

### December 2018

#### Leisure Review - UK

“Consumers are actively seeking the ‘new’ and they’re willing to pay for it. Activities which encourage them to step outside of their comfort zones and exert themselves both mentally and physically will appeal.”

#### Online Gaming and Betting - UK

“Technology trends and the migration of gamblers from retail to remote channels are driving online gaming and betting growth, but a static player base and possible peak in smartphone penetration are increasing its reliance on the same people spending more money, more often.”

#### The Leisure Outlook - Quarterly Update - UK

“The leisure industry continues to benefit from consumer drive towards experiences. As winter temperatures settle in, consumers are turning to indoor activities, especially visiting museums and art galleries. While pubs and nightclubs remain key to the night economy, operators need to find ways of holding up demand as consumers are ...

#### Cinemas - UK

“Rising ticket prices may deter cinema-goers from visiting as regularly as they’d like. Cinema operators are therefore looking at revenue streams beyond raising ticket base prices, including investing in widescreen theatres and ultra-comfortable VIP seating. However, by increasing the range of ticket options they risk losing clear differentiation between standard ...

### November 2018

#### Consumers and the Economic Outlook - Quarterly Update - UK

“Financial well-being and confidence was lower in each of the three months to October than we reported throughout the summer months. This matches the stagnant economic performance in August and September. Overall though, most consumers are still getting by, and remain relatively optimistic about their financial future.”

– Rich ...

#### Visitor Attractions - UK

“A long, hot summer gave welcome impetus to the UK visitor attractions market in 2018, but it is the economic climate that remains the strongest determinant of the sector’s size and shape, particularly through its influence on consumers’ holiday choices.”

### October 2018

#### The Football Industry - UK

“Fan preferences for the big-screen experience of television mean football’s first OTT (over-the-top) streaming services will change what we watch rather than how we do so.”

– David Walmsley, Senior Leisure Analyst

#### Spectator Sports - UK

“The cost of attending live sport events can be a barrier for some, even though the atmosphere is generally agreed to be far superior to watching sports in other ways. Venues are using technology to enhance the customer experience so this will help give fans more of an incentive to ...

### September 2018

#### Leisure Centres and Swimming Pools - UK

“The public leisure centre and swimming pool industry may have to experience a short-term downfall to make a long-term gain. Investments are required to ensure the whole estate is up to the standard that consumers expect. It is important that operators stay relevant and provide users, many of whom are ...

#### Sports Participation - UK

“With participation rates effectively static, growing the player base is now a common challenge for all sports. Breaking down barriers to play, however, will require an individual rather than collective approach as their strength and nature vary significantly from activity to activity.”

– David Walmsley, Senior Leisure Analyst

### August 2018

#### Consumers and the Economic Outlook - Quarterly Update - UK

“Consumers continue to worry about the impact Brexit will have on the UK economy. But people are still focussing much more on their own financial situations, which are currently in a pretty healthy state. The base rate rise will make it harder for some, but the general outlook is positive ...

#### Sports Betting - UK

“The 2018 FIFA World Cup will have accelerated growth in sports betting market value but is likely to have been less successful in growing the player pool or promoting new technologies.”

– David Walmsley, Senior Leisure Analyst

### July 2018

#### Health and Fitness Clubs - UK

#### The Leisure Outlook - Quarterly Update - UK

“Consumers are reprioritising their leisure spending towards sharing experiences and habitual leisure activities, including frequent visits to pubs for drinks, working out in a gym and buying takeaways. Meanwhile, England’s success in the FIFA World Cup combined with the recent heatwave has helped boost the UK leisure economy.”

– ...

#### Music Concerts and Festivals - UK

“The UK music concert and festivals market continues to grow in value, fuelled by more events, higher ticket prices and a rise in the number of music tourists from overseas. The industry can’t rely on international visitors to keep the market afloat. If music fans begin to cut-back or Brexit ...

#### Video Games and Consoles - UK

“Volume sales of video games are consistently declining despite the rising popularity of gaming and increased frequency of play. This reflects the extent of competitive online play, with gamers seeking to improve their performance and focus on fewer titles. Consequently, revenue streams are shifting towards online subscriptions, in-game payments for ...

“Operators need to embrace technology but remember that this is no substitute for personal interaction. Personal trainers and gym staff are a brand’s strongest asset. Affordability of personal training can be addressed, while using online channels to build rapport with customers can help overcome barriers to interaction.”

– Helen ...

### June 2018

#### Consumers and the Economic Outlook - Quarterly Update - UK

“The increase in confidence that we discussed in Consumers and the Economic Outlook – UK – March 2018 clearly wasn’t a one-off. Our confidence data has been running for almost a decade now, and people’s assessments, both of their current financial situation and how they expect their finances to shape ...

#### The Leisure Outlook - Quarterly Update - UK

“Consumers cut back on spending and put more focus on their health at the start of the year. As we approach summer peoples’ priorities appear to be shifting. A quality over quantity mind-set is still apparent but intention to spend on drinking and dining out is on the rise. Leisure ...

#### Gambling Review - UK

“A fall in lottery sales and a forthcoming cut in gaming machine stakes are presenting significant challenges to the retail gambling market’s most valuable segments.”

– David Walmsley, Senior Leisure Analyst

### May 2018

#### Pub Visiting - UK

“Millennials are particularly likely to view pubs as all-round leisure experiences and are receptive to new and more unusual forms of entertainment. The difficulty for landlords will be to cater for these more open-minded pub-goers while also meeting the needs of more traditional patrons who tend to see the pub ...

### April 2018

#### Betting Shops - UK

“The 2018 FIFA World Cup will not shield betting shops from the full impact of an imminent gaming machine stake cut, but it can help shore up the sporting side of the business.”

– David Walmsley, Senior Leisure Analyst

### March 2018

#### Consumers and the Economic Outlook - Quarterly Update - UK

“People are still wary about the potential impact of Brexit – particularly when it comes to the cost of living. But people seem able to separate these macro-economic concerns from their own personal financial situation. Unemployment remains at record lows, and while average wages are still increasingly more slowly than ...

#### Cycling - UK

“An uncertain macroeconomic environment is likely to affect mass-market demand among more ‘casual cyclists’. On the plus side, ‘cycling enthusiasts’ remain willing to spend on their hobby. Continual innovation in bicycle design and components, and new premium bicycles, including e-bikes, should help to sustain growth in market value.”

#### The Leisure Outlook - Quarterly Update - UK

“Although participation in many leisure activities continues to grow there are areas of the market that may begin to struggle if consumers begin to increase their saving habits. There is a growing range of eating out venues so pubs and restaurants need to stay innovative.”

– Helen Fricker, Associate ...

#### Casinos and Bingo - UK

“Casinos and bingo clubs are looking to external forces of regulation and technology as enablers of new formats and facilities that can reduce their reliance on the willingness to spend of their core customer base.”

### February 2018

#### Hobbies and Interests - UK

“UK consumers’ favourite hobbies are those which involve minimal outlay such as reading, listening to music and baking/cooking. As consumers are choosing to save, more costly activities may be deemed less affordable. The influence that online content is having on consumers, especially Millennials, cannot be ignored. These online influencers ...

### January 2018

#### Lotteries - UK

“Sliding sales of National Lottery draw games and scratchcards have damaged the market as a whole but could usher in a new period of innovation as Camelot scrambles to recover and its rivals look to cash in.”