

### January 2023

#### Cinemas - UK

“Recovery for the cinema market has so far been slow, with a weak slate of films in 2022 and the cost-of-living crisis making it more challenging to get people back through the door. In the longer term, further differentiation of the cinema experience, such as the introduction of more social ...

#### Visitor Attractions - UK

“Despite the rising cost of living, and subsequent squeeze on disposable incomes, visitor attractions remain a popular pastime for many. The end of COVID-19 restrictions and improved consumer confidence in visiting cities and their popular attractions has seen the size of the market return to close to its pre-pandemic level ...

### November 2022

#### Pub Visiting - UK

“The pub industry is recovering well from the extended implications of the COVID-19 pandemic, and is nearly back to its pre-pandemic value. The sector faces increased competition from competitive socialising venues, which continue to be popular – particularly amongst Gen Zs. Moving forward, pubs should focus on diversifying their offerings ...

#### Leisure Outlook - UK

“The recent increase in gym usage highlights the importance consumers continue to place on good physical and mental wellbeing. However, the fact that over-65s are most likely to be motivated by activities that are good for their physical wellbeing, but the least likely to attend the gym suggests there are ...

### October 2022

#### E-mobility: Electric Bikes and Scooters - UK

#### Leisure Trends - UK

“The foodservice-led recovery of overall market value is masking a slower revival in many out-of-home segments that leaves them vulnerable to the current income squeeze. A focus on mental wellbeing, physical health and simple escapism will be key to keeping their customers spending.”

#### Spectator Sports - UK

“Major events and Premier League football have led the market’s recovery in 2022, but attendance in other segments has been slower to return and is now vulnerable to the impact of the cost-of-living crisis.”

#### Esports - UK

“Esports continues to be a male-dominated industry, but scaling back the ‘win at all costs’ mentality could prove an effective way of making the industry more inclusive and getting more women involved in watching gaming content. Women-only tournaments with exhibition matches can provide a better sense of community for women ...

#### Sports Participation - UK

“Sports participants are determined to maintain their activity in the face of the cost-of-living crisis but many

“Despite relatively low levels of current usage, there is a widespread public view that e-mobility will play an increasing role in our transport future. Innovation is making e-bikes a more attractive consumer product, which have the potential to draw in new customers outside of the traditional cycling base. The cost-of-living ...

will have to make compromises and consider trading-down options to do so.”

### September 2022

#### Health and Fitness Clubs - UK

“74% of consumers would either make changes to, or cancel entirely, their health and fitness club memberships in order to save money amidst the backdrop of the cost of living crisis. Clubs should increasingly offer a range of tiered membership subscriptions to cater for consumers’ needs, as well as presenting ...

### August 2022

#### Leisure Outlook - UK

“Levels of pub visiting are on the rise, having been spurred on by multiple bouts of good weather over the past few months. Although visiting frequency is still not quite back to pre-pandemic levels, consumers are now spending more money when they venture out for a pub meal. Pubs have ...

#### Leisure Centres and Swimming Pools - UK

“The large majority of leisure centres and swimming pools survived the worst of the COVID-19 pandemic but inflationary pressures and the cost-of-living crisis are now adding to the threat that long-running investment issues pose to the most vulnerable.”

### June 2022

#### Gambling Trends - UK

“The market is making a strong recovery from the COVID-19 pandemic but is likely to have its wings clipped by new remote sector restrictions driven by player safety concerns. Operators will respond by targeting more recreational customers with an entertainment-led approach.”

– **David Walmsley, Senior Leisure Analyst – June ...**

#### Music Concerts and Festivals - UK

“The live music industry is well-positioned to navigate the cost of living crisis. Having been deprived of attending events as a result of the pandemic, there is significant pent-up consumer demand for live music and this will lead many people to prioritise spending money on tickets. Meanwhile the livestreaming of ...

### May 2022

#### Sport and the Media - UK

#### Leisure Outlook - UK

“Sport remains one of the most important segments of the media market but needs to encourage younger fans to broaden their interest beyond football and boxing and find new ways of monetising the wider engagement of older followers.”

“18-24s are now as likely to take part in competitive socialising activities as they are to go to the pub for drinks, highlighting their desire for new and varied activities that provide a sense of adrenaline but don’t necessarily involve consuming alcohol”.

– **Paul Davies, Category Director – Leisure, Travel ...**

### April 2022

#### Exercise Trends - UK

“While gyms and other paid exercise venues are seeing a rapid return of customers following the lifting of COVID-19 restrictions, the looming cost-of-living crisis threatens to push people back to the cheaper in-home and outdoor activity they became accustomed to during lockdowns.”

– **David Walmsley, Senior Leisure Analyst, April ...**

#### Consumers and the Economic Outlook Q1 - UK

“Even before the conflict in Ukraine, inflation had become the biggest concern for consumers, brands and the British economy for 2022. Households are set to endure the biggest squeeze on real incomes in decades, and the conflict in Ukraine will only add to existing inflationary pressures. This is seen in ...

### March 2022

#### Cycling - UK

“Rising petrol prices, and the possibility of a protracted oil crisis as a result of the conflict in Ukraine, could help to ‘nudge’ more people from car travel towards cycling. The impact of these events, along with UK net-zero carbon targets, is likely to strengthen the long-term case for energy ...

#### Casinos - UK

“Land-based casinos have begun to bounce back from the COVID-19 crisis as restrictions have been lifted, while online operators are retaining much of the business they gained during lockdowns. Forthcoming regulatory reform could benefit venues and damage remote revenues but both segments face a more immediate danger from a cost-of-living ...

### February 2022

#### Leisure Outlook - UK

“The first signs of how inflation will impact the foodservice market are beginning to show. Takeaways remain a popular option with consumers’ substituting evenings out with evenings in, meanwhile those heading out for a meal are favouring full-service restaurants that justify the expense by offering something extra special”.

#### Hobbies and Interests - UK

“The pandemic has raised the importance of hobbies in people’s lives, and seen many adults take up brand new interests, revisit old pastimes and rediscover a sense of childhood play. Hands-on physical activities offer digital downtime and provide a therapeutic pressure valve in a stressed society.”

– **John Worthington ...**

### January 2022



### Lotteries - UK

“Lottery play has remained resilient throughout the pandemic and can grow into the medium term through new opportunities for innovation in game formats, distribution channels and non-cash prize structures.”