

## January 2018

### The Leisure Outlook - UK

“Changes in leisure activity participation and spending indicate that consumers are choosing quality over quantity when it comes to drinking and dining out. Increased voucher usage also reflects that Brits are keen to keep up their leisure habits but seeking ways to make this more affordable.”

– Helen Fricker ...

### Leisure Review - UK

“Consumers are seeking experiences more than ever so activities that provide this in a unique, immersive and active way are likely to be popular. Activities needn’t be highly technological or obscure but rather bring people together and allow them to reconnect in an increasingly digitised world.”

## December 2017

### Online Gaming and Betting - UK

“Multichannel gamblers play primarily online but their retail habits are being kept alive by a continuing reluctance to take remote activity outside the home.”

## November 2017

### Cinemas - UK

“High consumer interest in 4DX cinema indicates that the format will not simply be a gimmick but could potentially become a genuine staple of the industry. Broadening the scope and appeal of the format will rest on using it to different degrees for different genres, with some films only having ...

### Visitor Attractions - UK

“Visitor attractions continue to benefit from an expanding pool of potential patrons as a weak pound boosts inbound tourism and holidaying at home, while new technologies and venue formats have an important role to play in keeping experiences refreshed.”

### Holiday Beauty - UK

“NPD in the holiday beauty sector largely focuses on convenience, with travel-sized products and on-the-go claims. However, with the majority of people choosing not to buy beauty products specifically for use on holidays there is a perceived lack of need in the sector. NPD in products by holiday type as ...

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

“Consumers’ spending power is being hit by the squeeze on incomes as inflation continues to outpace average wage rises. In four of the last five months, people have been more likely to feel worse off compared to a year ago than to say that their finances have improved. This is ...

## October 2017

### Spectator Sports - UK

“Live streaming shows growing potential to open spectator sports to a wider range of demographics, while stadium operators can turn to good old-fashioned

atmosphere to help event attendance stand out from the leisure crowd.”

– David Walmsley, Senior Leisure Analyst

## September 2017

### Sports Participation - UK

“Fitness is both the main driver of participation in sport and the principal barrier to taking part. Successful providers need therefore to articulate the fitness benefits of their activities while allaying the fears of potential newcomers that they are not fit enough to join in.”

– David Walmsley, Senior ...

### The Leisure Outlook - UK

“Leisure activities are driven by younger Millennials and parents of under-16s. Eating at pubs is a popular leisure activity, yet so is staying-in and ordering a takeaway. As the pay squeeze intensifies, more people are turning to free activities such as museums and galleries. Meanwhile, people are continuing to focus ...

### Leisure Centres and Swimming Pools - UK

“With more public leisure centres and swimming pools being run out-of-house by external companies, the standard of these facilities may improve. All the signs are there for increased usage; both consumers and the Government appear to be placing greater focus on leading active lives which should benefit leisure centres.” ...

## August 2017

### Music Concerts and Festivals - UK

“Technology is helping to increase spend while at events and cashless payment in the form of wristbands is likely to become fully available. Consumers are seeking out more experiences than material possessions which is benefitting the music festival and concert market.”

– Helen Fricker, Senior Leisure Analyst

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

“The snap election clearly unsettled consumers. All three of our measures of sentiment fell between April and May. And the inconclusive result means that there was no immediate bounce in confidence post-election. Instead, our data shows that people were even more concerned after the results were announced than they were ...

### Sports Betting - UK

“The sports betting market, now dominated by online activity, is looking for mobile users to extend their staking habits beyond the home and for social media to finally come of age as a platform for play.”

## July 2017

### Health and Fitness Clubs - UK

“The health and fitness market is in a strong position to continue growing. With an increased focus on active lives, healthy eating, and exercise from both consumers and other industries this should feed into the health club sector. Operators need to keep up with market trends, especially technology.”

– ...

## June 2017

### Gambling Review - UK

“The UK’s retail gambling market faces some potential headwinds to sustained spending growth but can limit that impact by tapping into younger demographics’ growing interest in particular modes of play.”

– David Walmsley, Senior Leisure Analyst

### Attitudes towards Leisure Venue Catering - UK

“UK consumers are taking part in leisure activities more frequently than in recent years. With the value of the pound being affected by Brexit venues should see further increases in both UK and overseas visitors. Catering facilities at these venues are in a prime position to take advantage of this ...

## May 2017

### British Lifestyles: Preparing for Change - UK

“Whether in favour of or against the UK’s decision to leave the EU, it has undoubtedly triggered a period of great political, social and economic change. However, while Brexit will almost certainly present challenges for UK businesses and consumers alike, there remain opportunities for brands to drive growth, with the ...

### Tenpin Bowling - UK

“The industry is currently half way on a journey between the old-style bowling alley and its hoped-for new destination as a modern, multi-generational entertainment centre providing a light-hearted competitive social experience, where bowling is increasingly blended with other forms of activity alongside an enhanced dining offer.”

– John Worthington ...

### Pub Visiting - UK

“Continuing to grow sales will be particularly important to pub operators in order just to stand still in terms of profits, given increased operating costs in 2017. Household budgets also look likely to be squeezed during 2017 by rising inflation, impacting on discretionary spending in pubs. This will all make ...

### The Leisure Outlook - UK

“Overall almost all the leisure activities covered have seen increased visitation over the last 12 months which is good news for the industry. It is hard to predict what Brexit will mean in terms of consumer behaviour but it does appear that it is driving more cautious spending and not ...

### Betting Shops - UK

“Will the party soon be over for betting shop gaming machines? Investment in new sports betting technologies looks increasingly important in helping bookmakers lessen the impact of any forthcoming regulatory hit.”

– **David Walmsley, Senior Leisure Analyst**

## March 2017

### Casinos and Bingo - UK

“The traditional gambling products at the heart of the casino and bingo club experiences remain central to their appeal and stand as important differentiators of these venues from both online alternatives and high street rivals in the out-of-home entertainment sector.”

– **David Walmsley, Senior Leisure Analyst**

### Bicycles - UK

“The good weather and Olympic success have culminated in a much more positive year for the cycling market than was witnessed in 2015. Although the effect of Brexit on the exchange rates will impact the cost of imports over time, with more work being done to encourage UK consumers to ...

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

“Consumer sentiment has remained strong, reflecting growing real wages, low unemployment and, as yet, the absence of any major economic upheaval post-EU vote. When it comes to the impact of the vote, people are relatively positive about the big-picture issues such as the UK’s economic growth, and most feel ...

## February 2017

### Hobbies and Interests - UK

“The activities that Brits are choosing to do in their spare time seem to, in some instances, mirror a trend for cutting back with low-cost gyms more popular than ever and a huge increase in participation in hobbies which involve minimal outlay such as baking and knitting.”

– **Helen ...**

## January 2017

### Sport and the Media - UK

“There are signs that major media players, including Facebook, Twitter and Amazon, are looking to make significant plays in regards to live sport broadcasting



## Leisure - UK

over the coming years. Live sport could offer these platforms a powerful differentiating feature within competitive marketplaces, while also potentially presenting a genuine threat to the ...