

### January 2020

#### Cinemas - UK

“The UK cinema industry looks set to enjoy another bumper year on the back of record-breaking returns in the summer months for admissions at the box office. Wider revenues from retail spend per head look set to grow, as exhibitors upgrade their portfolio of sites to enhance retail offerings and ...

### December 2019

#### Leisure Review - UK

“More options than ever mean consumers are at a crossroads when it comes to leisure activities. The choice is no longer between which restaurant or pub to visit, but whether to go out at all. Operators must tap into the experience economy to entice consumers to venues, or utilise technology ...

#### The Leisure Outlook - UK

“Consumers have begun preparing for Christmas by adding to savings and reducing spend on nights out. While participation in some leisure activities is expected to take a hit, indoor venues look set to at least maintain trading levels as the winter cold settles in. Pubs hope to boost pre-Christmas trade ...

### November 2019

#### Consumers and the Economic Outlook - UK

“Brexit has been delayed again. The public faces a Christmas general election. And the economy narrowly avoided a recession in September. It is no wonder, then, that consumer confidence has taken a hit. However, financial well-being is holding up and the vast majority of people think they’ll be OK in ...

#### Sports Participation - UK

“The sports participation market is struggling to expand its player pool but has new potential to grow through a

#### Online Gaming and Betting - UK

“After a period of impressive growth, the UK online gambling market has started to face some headwinds, which will hinder near-term growth prospects. Smartphone penetration appears to have levelled off, while increased regulatory scrutiny on the gambling industry has resulted in a more difficult operating environment. Despite these challenges, well-capitalised ...

#### Spectator Sports - UK

“A golden year for women’s sport and high levels of public interest in seeing more of it have created an unprecedented opportunity for female teams and athletes to step into the market’s mainstream.”

shift in policy and promotional focus from activity for fitness to activity for health.”

– **David Walmsley, Senior Leisure Analyst**

### October 2019

#### Visitor Attractions - UK

“The UK visitor attractions sector continues to benefit from continuing ‘staycation’ habits, the draw of creative attractions and investment in technology. Forming partnerships with travel operators and enhancing the visitor experience will help the sector to continue its momentum amidst uncertainties.”

– **Lauren Ryan, Leisure Analyst**

#### Competitive Socialising - UK

“The UK competitive socialising market is evolving rapidly due to strong consumer appetite for unique and challenging experiences. Updated takes on classic activities are pushing the industry forward, with plenty of innovation still to come. Established brands need to strengthen their proposition to compete with emerging adult-only concepts, which are ...

### September 2019

#### Leisure Centres and Swimming Pools - UK

“An increase in facility numbers helped the public leisure centres and swimming pools market return to growth in 2019 but the difficulty of upgrading an ageing venue stock while local authority budgets remain heavily constrained means potential for further expansion is limited at best.”

#### The Leisure Outlook - UK

“Whereas the UK leisure economy benefitted from 2018’s summer heatwave and England’s run in the FIFA Men’s World Cup, participation in leisure activities has continued to increase in 2019 so far, with expenditure likely to follow. Whilst high employment levels and positive real wage growth has boosted sentiment, the coming ...

#### Consumers and the Economic Outlook - UK

“It is a confusing time for the British public. The new Government has been unable to agree a Brexit deal with the EU and Parliament has passed legislation obliging the Prime Minister to request a further extension if he cannot get one. Despite this, Boris Johnson has maintained his stance ...

### August 2019

#### Video Games and Consoles - UK

“The video games and console market is estimated to continue its decline in 2019 and much of 2020. However, the launches of the next Xbox and possibly PlayStation towards the end of next year are set to

#### Sports Betting - UK

“The balance of power in the sports betting market tilted further towards its online segment in 2018/19 but in-person activity will remain an important influence on

significantly boost the market from that point on. Another growing trend in the ...

player volumes and the future shape of the sportsbook offer.”

### Music Concerts and Festivals - UK

“The UK music concerts and festivals market continues to grow steadily, fuelled by more events, investment from the recorded music sector and economic uncertainty prompting some Brits to substitute overseas trips in favour of UK-based leisure activities. In an increasingly crowded market, operators need to utilise elements of the entire ...

## July 2019

### Health and Fitness Clubs - UK

“Growth in the health and fitness club market is being driven by low-cost operators, with little sign of the expansion of locations slowing in the short term. While people are keener than ever to take on active challenges and boost their health, intense competition is coming from the home workout ...

### Consumers and the Economic Outlook - UK

“The closer we got to the planned Brexit Day, the more worried people became about the impact it’d have on the UK’s economy. With the delay to Brexit, these concerns seem to have melted away. People are far more relaxed about what Brexit will mean for both their own finances ...

## June 2019

### The Leisure Outlook - UK

“The Easter heatwave provided a boost to the pub sector as more people headed out for food and drinks in casual, outdoor settings. However young people showed a desire to strike a balance between health and indulgence, as many kept up regular exercise routines.”

– Paul Davies, Category Director ...

### Gambling Review - UK

“The retail gambling market is facing a prolonged period of potentially major change as the betting shop business model is challenged fundamentally by gaming machines’ new regulatory regime.”

## May 2019

### Pub Visiting - UK

“Locally sourced food and drink attracts strong consumer interest and offers a viable means for pubs/bars to appeal beyond price. Flagging up that certain meal components or drinks are sourced locally would also help to strengthen the idea of pubs as supporting the local economy, evoking a feel-good factor ...

### April 2019

#### Online Dating - UK

"Many apps are moving away from the gamified swiping feature that drove Tinder's popularity and helped bring online dating into the mainstream. Instead, focus is returning to helping make meaningful personality-based connections, with the aid of increasingly sophisticated artificial intelligence".

#### Betting Shops - UK

"With the new stake limit coming into play, the future looks bleak for the betting shops market. If operators can move away from their heavy reliance on gaming machines and towards improving customer experience and promoting a community spirit, they're more likely to weather the storm".

- Zameira Hersi, Leisure Analyst

### March 2019

#### Casinos and Bingo - UK

"The vast majority of consumers have not visited a casino or bingo club in the past year. Many cite a lack of interest in the games as a reason for not visiting and say nothing would encourage them to visit. Whilst this picture appears bleak, there are opportunities to get ...

#### Cycling - UK

"Cycling ticks all of the right boxes on physical and mental health, pollution, congestion and low-carbon sustainability, but there are few signs of growth and all stakeholders, public and commercial, will need to combine their collective energies if this potential is to be realised."

#### The Leisure Outlook - UK

"Consumers spent cautiously over the Christmas and New Year season of 2018/19 despite having money left at the end of the month. Yet the promise of spring looks strong, partly due to people's plans for the coming quarter, which should help the leisure sector rebound from the recent lull ...

### February 2019

#### Consumers and the Economic Outlook - UK

"Concern over the impact of Brexit is more severe than at any other time since Mintel started tracking this measure, including the initial shock in the immediate aftermath of the vote. Theresa May's withdrawal agreement was the first glimpse of anything resembling certainty since Article 50 was triggered in March ...

#### Hobbies and Interests - UK

"Increasing awareness of the health and wellbeing benefits of taking part in hobbies and interests is set to be the next big driver of market growth."

- David Walmsley, Senior Leisure Analyst

### January 2019

#### Lotteries - UK

#### Sport and the Media - UK



## Leisure - UK

“By positioning digital platforms as an easier way for players to purchase tickets and a way to ensure they never miss their chance of taking part, operators can increase not only the number of those playing, but the frequency with which they do so.”

“Currently pay-TV providers have a fairly strong hold on UK sports broadcasting, making it difficult for new entrants into the market, such as Eleven Sports. However, as Amazon further pushes into the live sports arena and more sports introduce their own subscription streaming services the dominance of Sky and BT ...