COMPETITIVE SOCIALISING 2023

KAM

Introduction

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Competitive socialising is on the hospitality map, that can't be disputed. People are visiting the sector more often than they were last year which is driven by consumer trends focussing on experience but also the increase in choice!

Unlike with the paradox of choice where less is more, the increase in options for customers is only going to be a good thing, but that does mean that they will likely become more demanding, more knowledgeable and more particular when it comes to the venue of choice. Therefore, to win in the growing sector, venues must deliver a great experience, which starts by understanding your customers and what they want.

This report looks into the behaviour and attitudes of competitive socialising customers in relation to both the games and activities, as well as core hospitality elements such as food, drink and its role within more traditional venues.

Laurence Brown, Senior Insight Manager

KAM

Contents

- The state of play
- The competitive socialising crowd
- The path to discovery
- Being a part of the journey
- The in-venue experience
- The opportunity for wider hospitality

Methodology:
The data from KAM that features in this report is taken from a research study commissioned exclusively for this report (KAM - Competitive Socialising Report 2023). This research was a nationally representative online survey of UK adults (18+), sample size 529, conducted April 2023). Unless stated, all responses referenced have stated they visit competitive socialising venues.

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THE STATE OF PLAY

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39%...

…of the UK adult population said they have visited a competitive socialising

Up 12% on last year!

Source: KAM – Competitive Socialising 2023

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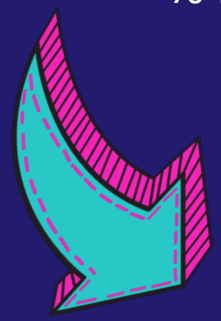
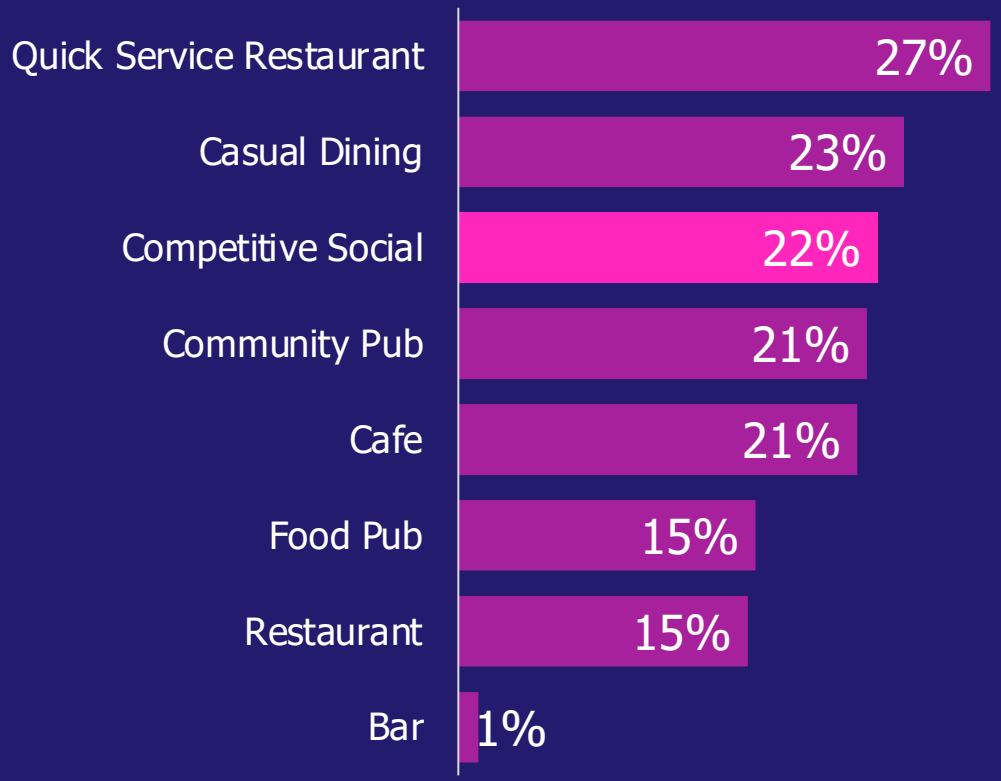
Changes in footfall in line with broader hospitality

% increase of WIFI logins April 2022-23 vs previous year





Last year hospitality footfall was 10% down on average. (Comparing Feb 2020 to Dec 2021, based on logins at venues)

But footfall at dedicated competitive socialising venues are less than 2% down indicating experiential venues bounced back slightly faster.

This year, however competitive Socialising is **holding it's own against the other categories**, but isn't an outlier in the same way as we saw previously (possibly because of it's faster recovery, it is harder to keep outperforming).

Wireless Social data based on 2,543,453 logins*. Provider had to be working with Wireless Social over full 2 year period*

The cost of living means that, as consumers, we demand more ‘value’ from our discretionary spend. The ‘value’ itself is defined based upon each individual consumers needs and priorities. It could mean the cheapest, but it can also mean the pleasure you gain from treating yourself. The Competitive Socialising market provides it’s value through delivering an experience that is hard for customers to replicate elsewhere.

The successful businesses are those which can combine simple but enthralling game play, with a killer atmosphere, coupled with a great F&B offer. The concept is successful in encouraging trial, the challenge is driving frequent visits and loyalty amongst the customer base in a growing competitive market.

In this section we look at the growing demand for Competitive Socialising, the mix of customer types, the types of games that are driving demand, and how variety is the spice of life!

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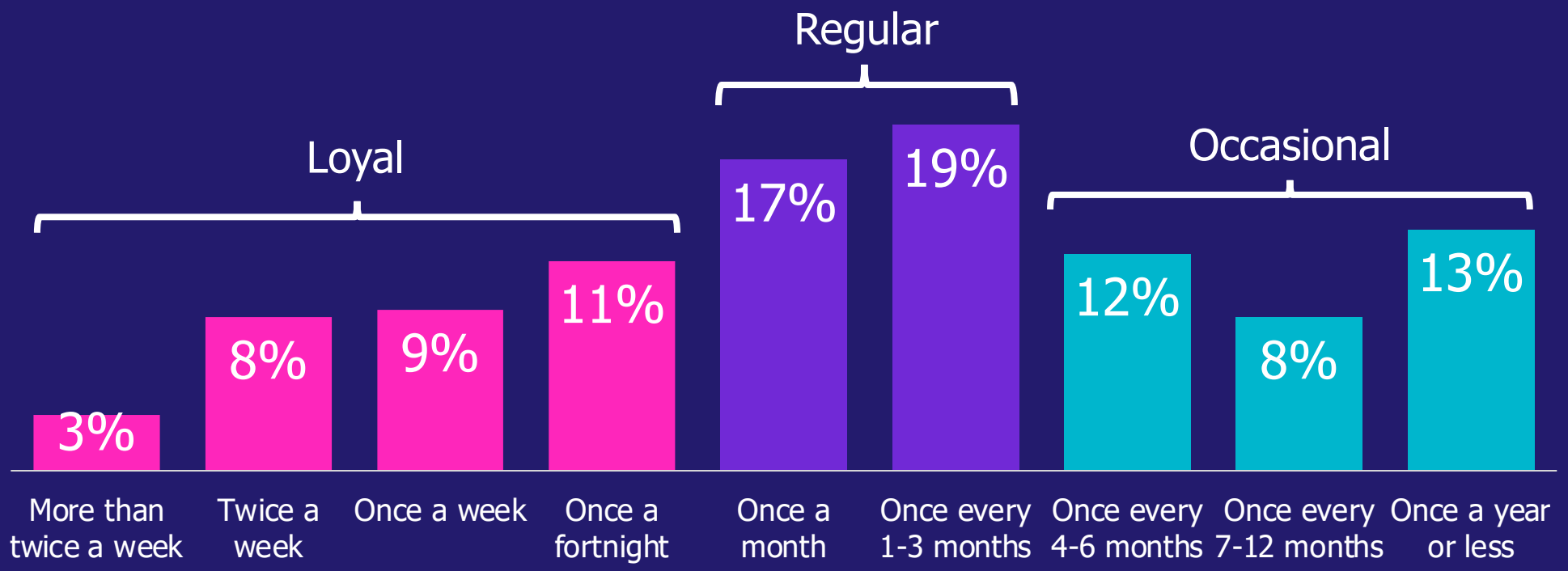
Customer visit patterns

On average, competitive socialising customers, visit venues 1.9 times per month. They can be quite evenly divided between 3 core groups – loyal, regular and occasional.

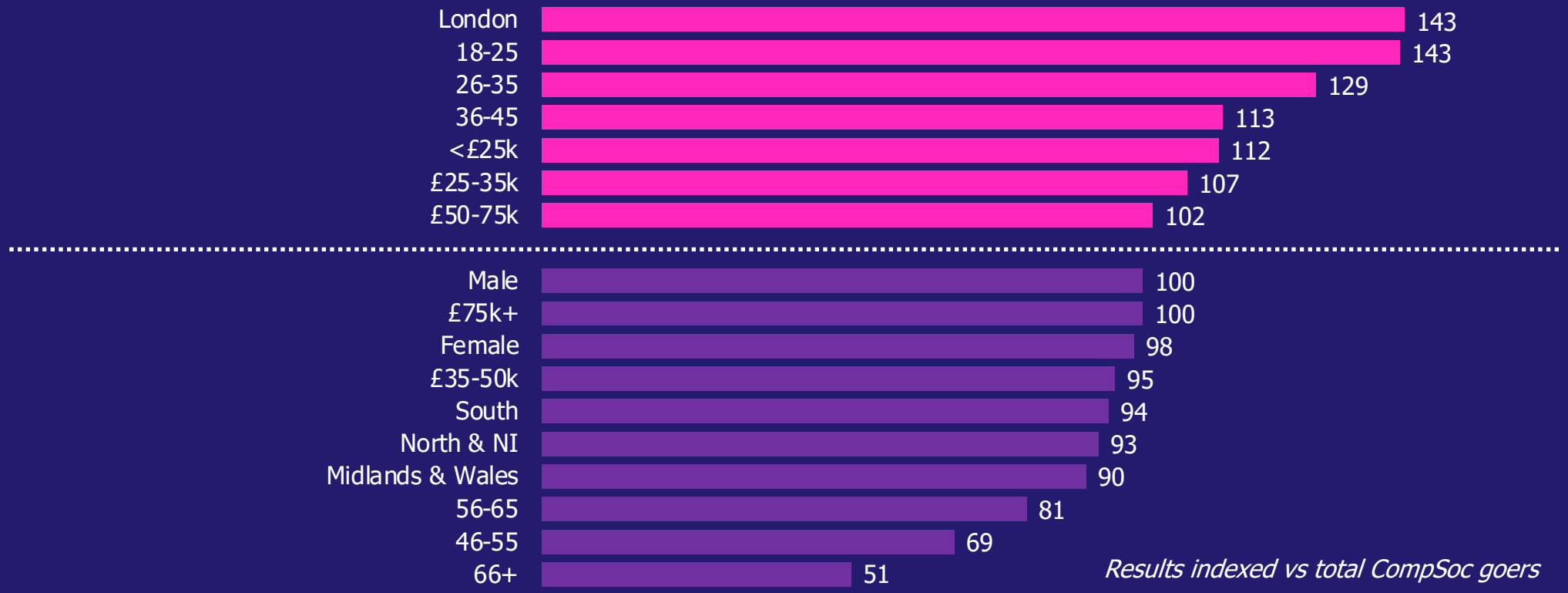


Source: KAM – Competitive Socialising 2023

Q. How often do you visit competitive socialising venues? - Competitive Socialising Report 2023

Who are the 'loyalist' CompSoc visitors?

It is the younger demographics who are most likely to be 'loyalists' to the sector, as well as those from London, likely driven by the amount of choice available



Source: KAM – Competitive Socialising 2023

Q. How often do you visit competitive socialising venues? - Competitive Socialising Report 2023

32%...

...are visiting competitive socialising venues MORE than they were last year with just **22% visiting less.**

This suggests that, despite challenging economic pressures, CompSoc customers see the 'value' and 'experience' that competitive socialising venues can offer.

Source: KAM – Competitive Socialising 2023

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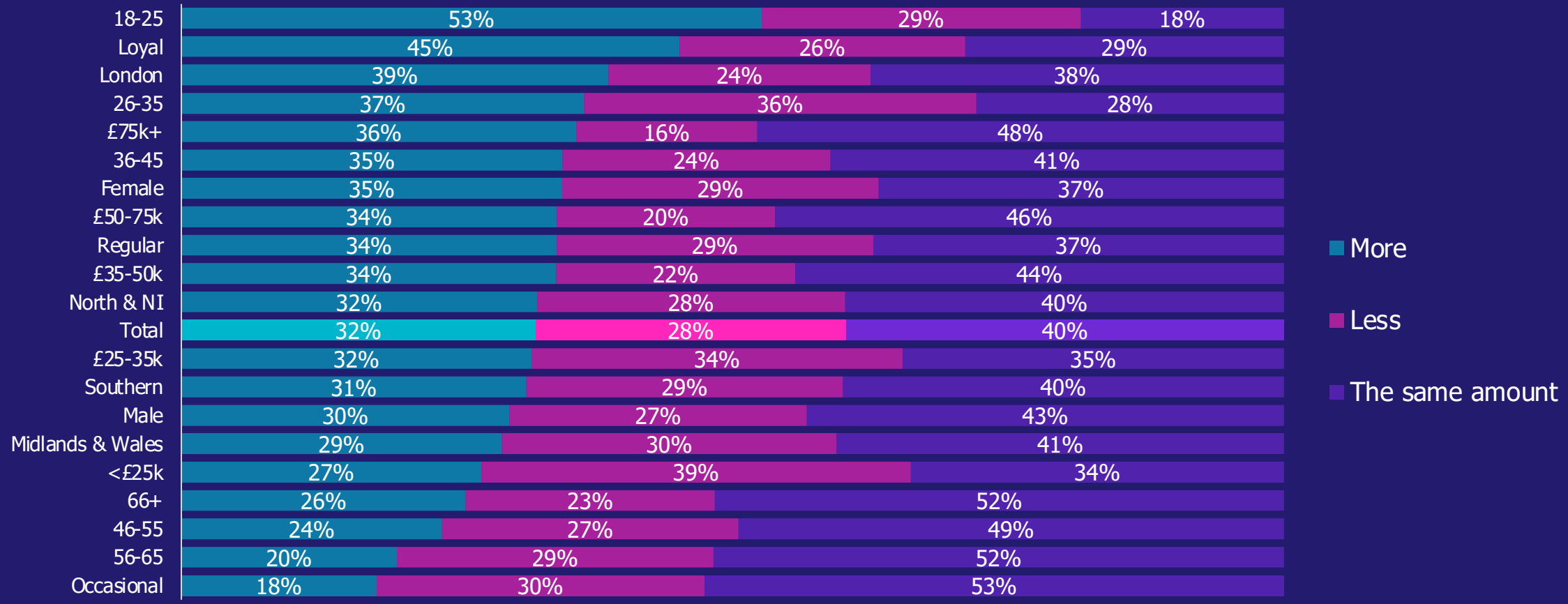
Affluent, loyal, London based CompSoc goers are driving the increase in frequency



Source: KAM – Competitive Socialising 2023

Q. How often do you visit competitive socialising venues? - Competitive Socialising Report 2023

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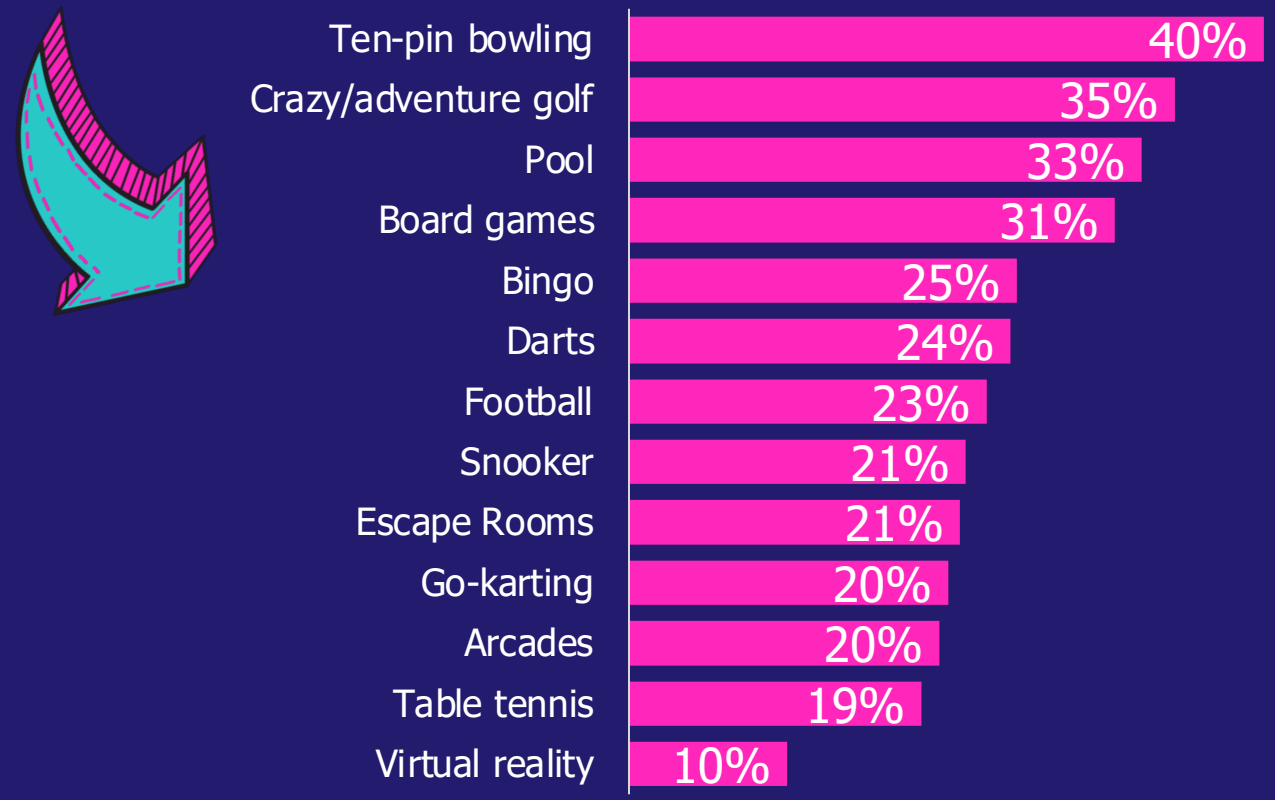
The most popular games

The top favourite games according to CompSoc goers



'Classic' gaming concepts will always prove popular with customers. Creating an entry point for the older generations, through familiarity, whilst also being accessible to younger generations. Venues that are able to add unique twists, enhanced gamification, and introduce technological advances are those that can bring these classic games into the modern entertainment space.

Source: KAM – Competitive Socialising 2023

Q. Which types of 'games' or 'activities', are your favourite to play or do in a competitive socialising venue?

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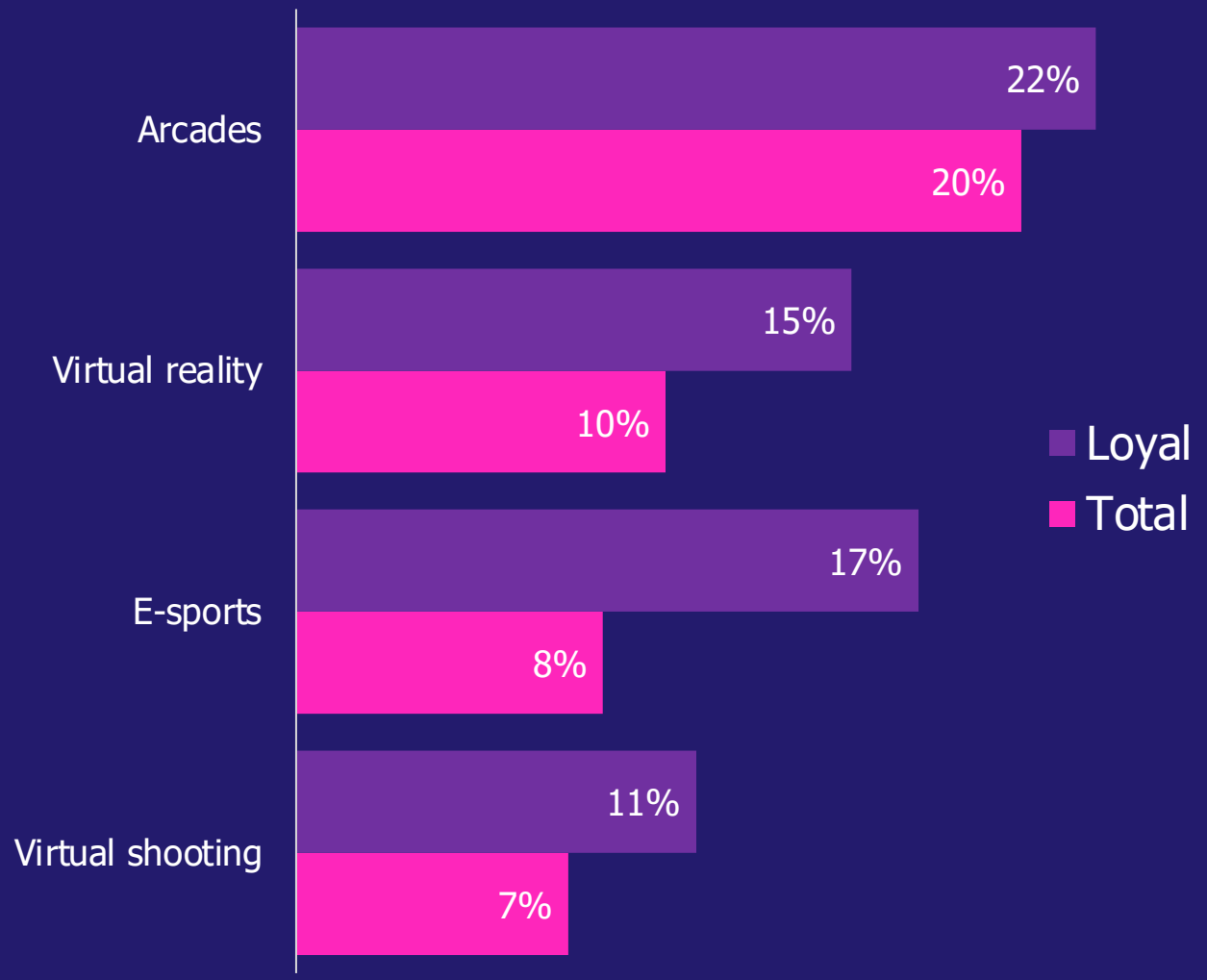
Tech based activities are still less 'mainstream'

Those who visit competitive socialising venues more often (loyalists), are the ones driving the trial of high-tech, virtual, innovative venues, highlighting it is yet to enter the mainstream repertoire of venues.

Alternatively, those who visit less often (occasional) are more likely to have just touch the surface of the sector with 'classic' CompSoc activities such as ten-pin bowling (48%) and crazy/adventure golf (40%).

Venues with multiple activities can use these more mainstream activities to help them trial other activities in the sector.



Q. Which types of 'games' or 'activities', are your favourite to play or do in a competitive socialising venue? (select up to 5)
Source: KAM - Competitive Socialising Report 2023

Variety is the spice of life

60%...

...of those who visit competitive socialising venues have visited venues that offer **multiple activities.**

83%...

...of those who have visited the multi-activity venues took part in **multiple activities in the same visit.**

Source: KAM – Competitive Socialising 2023

Q. Have you been to a competitive socialising venue that offers multiple activities/games e.g. bowling, darts and crazy golf in the same venue?

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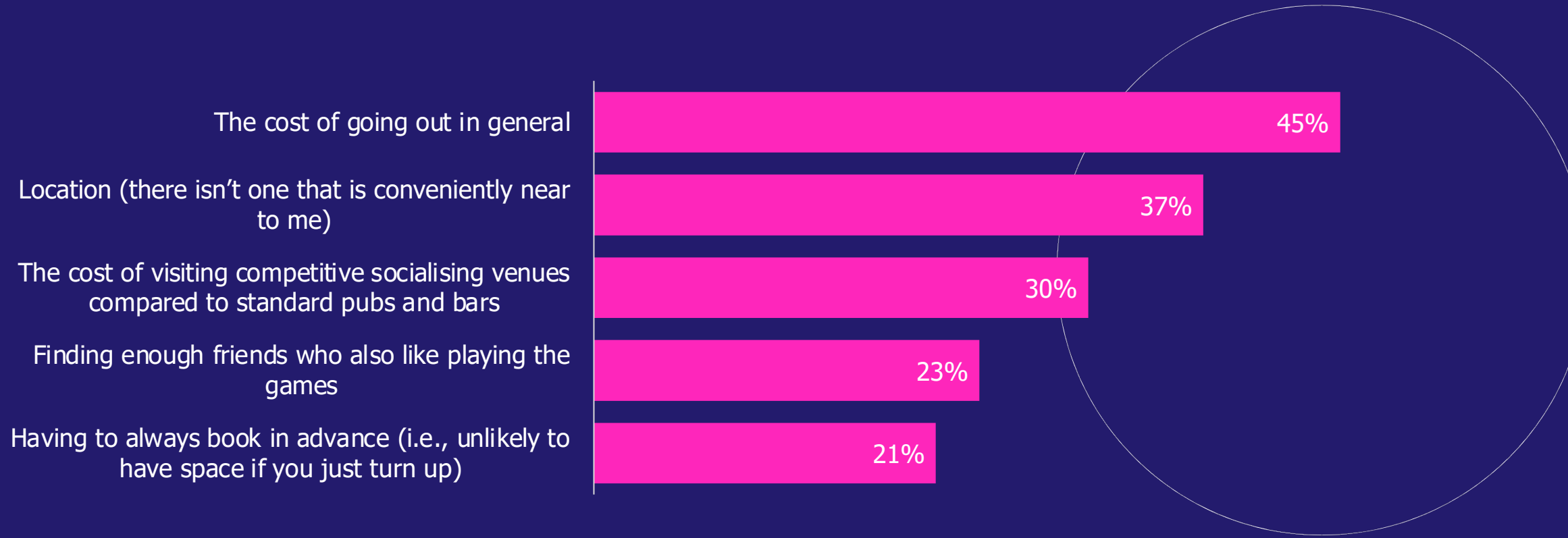
The barriers to increasing spend

Cost of living will of course put strains on the ability to go out more, but improving accessibility. Make it easier for customers to turn up and play and ensuring activities are suitable for smaller groups or individuals.



Source: KAM – Competitive Socialising 2023

Q. Which of the following, if any, prevents you from visiting competitive socialising venues more often than you currently do?

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Gone are the days of a pub that offers no experience or point of differentiation as people have realised they can drink or eat for cheaper at home. People now have a desire to do something, like an activity, as the core reason to their visit to a hospitality venue. Competitive Socialising offers exactly that "somewhere to do something while socialising".

Tom McMahon
Finance Director, Rileys Sports Bar

THE COMPETITIVE SOCIALISING CROWD

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Competitive Socialising can be seen as a natural progression for traditional pubs and bars in an increasingly digitalised and gamified social landscape. However, games have a broad appeal and are able to bring people together, of all ages and walks of life. Finding the sweet spot in this heady mix can unlock fantastic opportunities for operators and brands.

In this section we take a look at the group composition in Competitive Socialising venues, the most popular occasions that customers choose to visit for and what are the most important factors that make them choose one venue over another.

We also showcase the value to be had in the family groups. There are over 278 million family dining occasions in the UK each year. Switching just one of these visits, per month, from a traditional restaurant to a Competitive Socialising venue could be worth in excess of £3bn per year to the industry.

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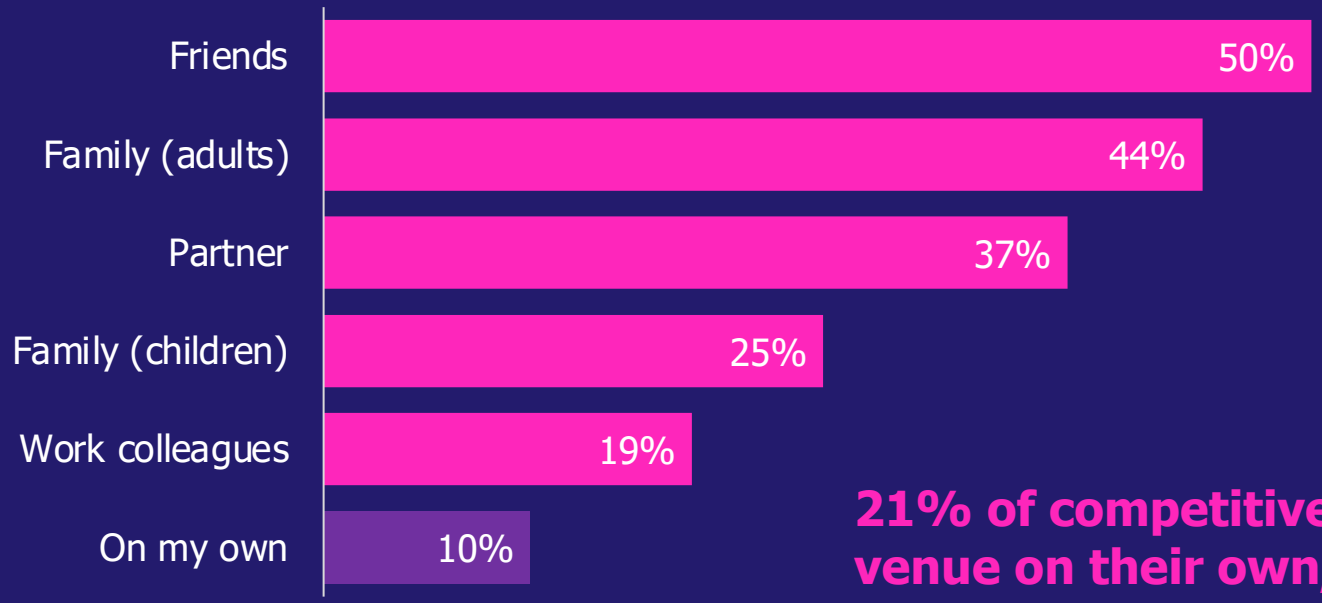
Group composition for CompSoc

Competitive socialising venues are as diverse as the rest of hospitality when it comes to the types of customers who would be visiting – showcasing that they are universal in their appeal



25% of London based respondents have been with work colleagues, compared to just 13% in Midlands and Wales. This highlights the importance of knowing your potential customer base and adapting the offering to match it.

21% of competitive socialising 'loyalists' have been to a venue on their own, not to be disregarded as group size

Source: KAM – Competitive Socialising 2023

Q. Who do you typically visit competitive socialising venues with?

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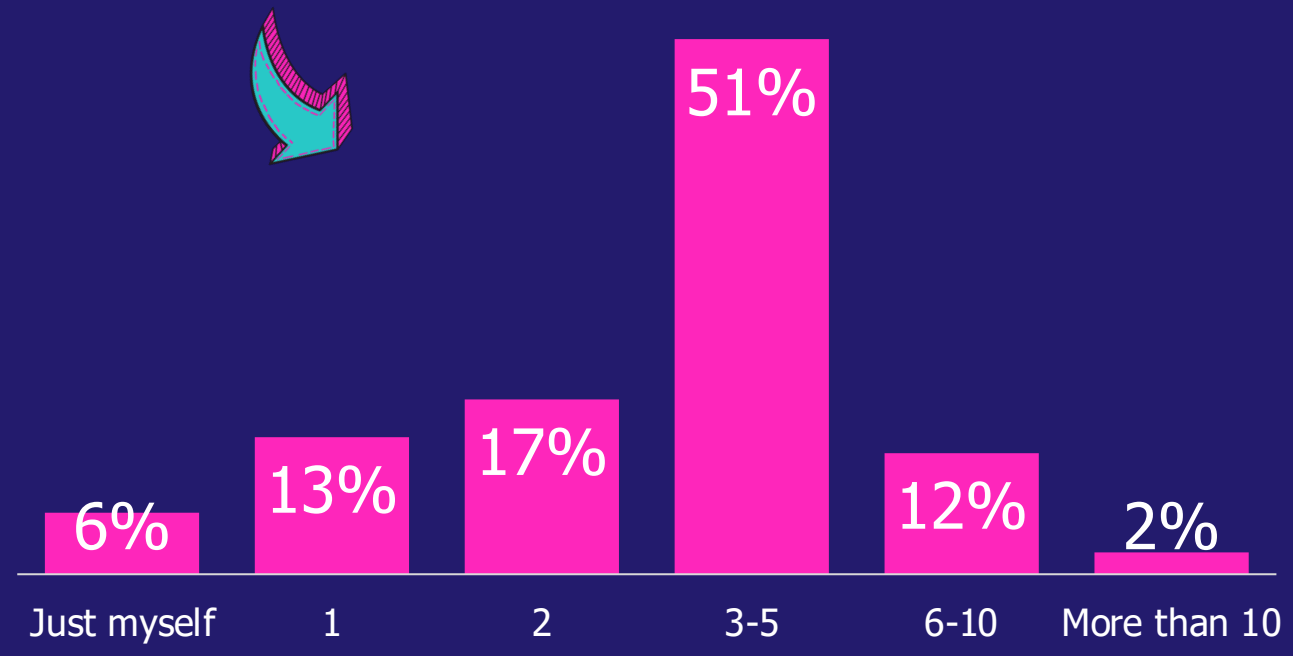
There's fun to be had in a crowd

The average number of people they visit competitive socialising venues with



The average total group size when visiting competitive socialising venues is

4.53

Older CompSoc goers are more likely to go in larger groups, perhaps driven by the work social occasion or it's a venue for a smaller, low-key catch up for younger age groups

Source: KAM – Competitive Socialising 2023

Q. On average, how many people do you go with when you visit competitive socialising venues?

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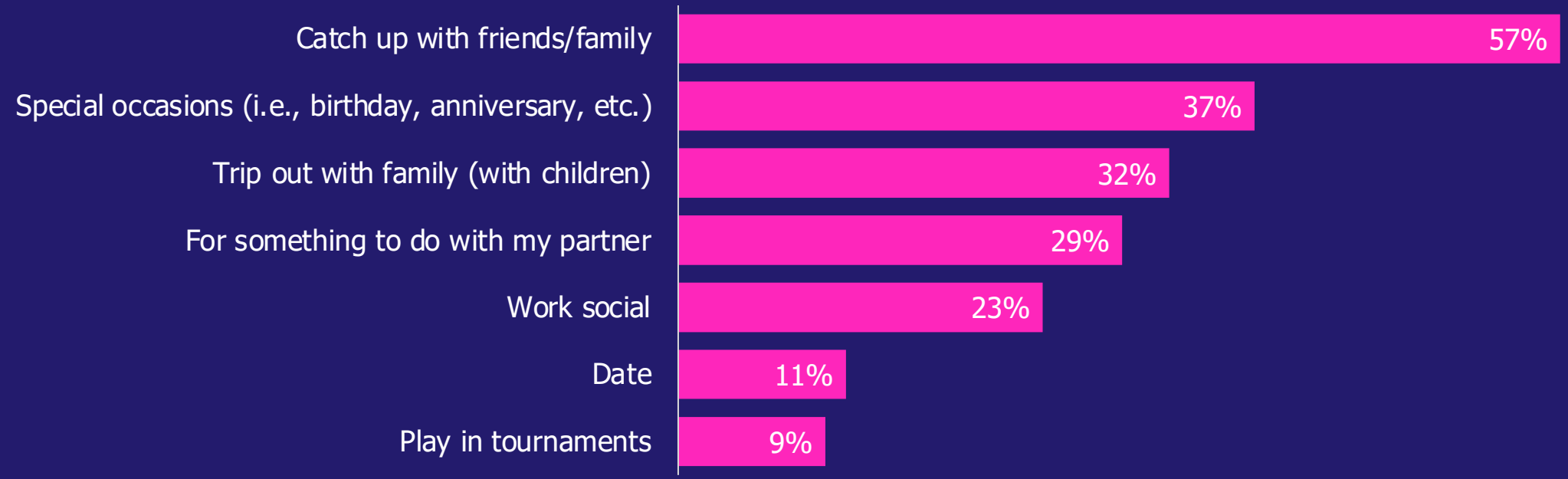
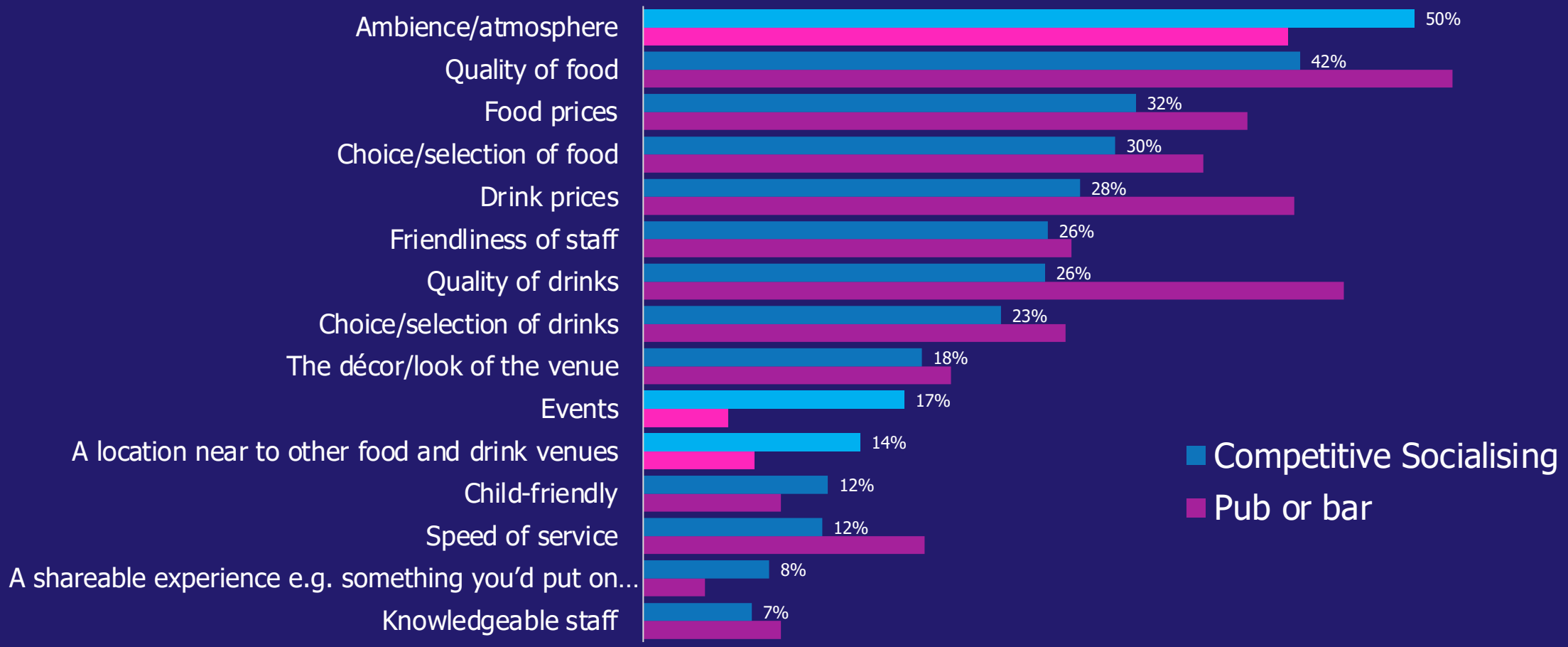
Similar to group types, the occasions vary

Venues need to consider the occasions they predominately serve, however there is opportunity to drive trial in multiple ways. Providing a specific offer and comms for birthdays, dates, work socials, tournaments etc would ensure most bases are covered



Q. For which of the following 'occasions' do you visit competitive socialising venues? (Select all that apply) -
Competitive Socialising Report 2023

Atmosphere, events and location important to CompSoc venues



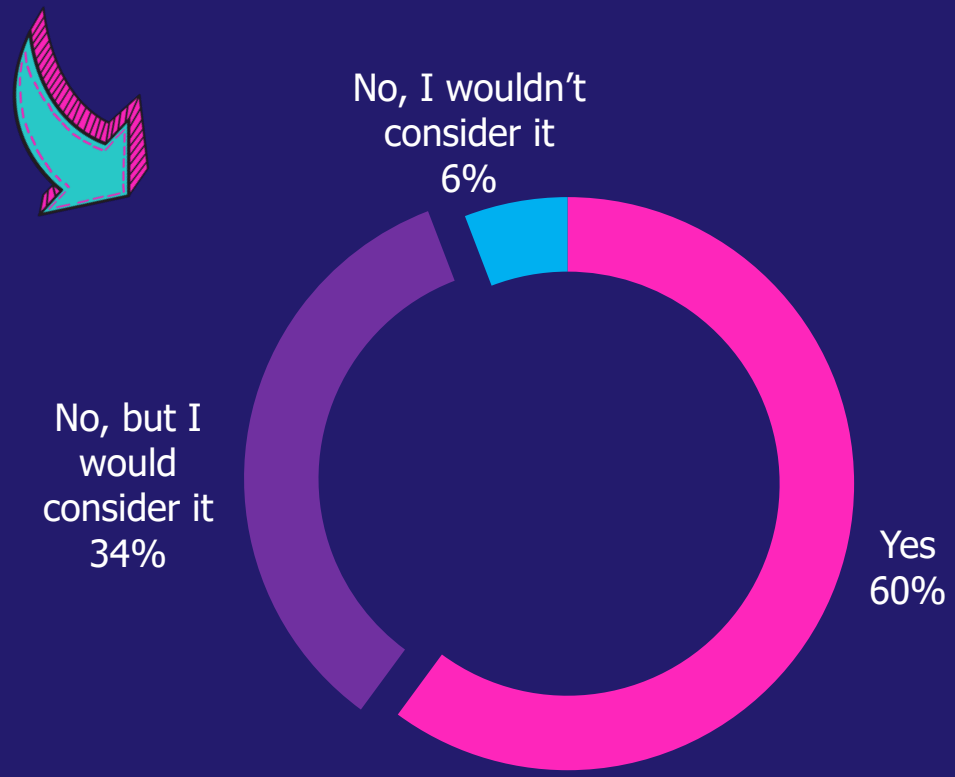
*Q. Of the following, what are the most important things that you look for when visiting a **competitive socialising/ pub or bar** venue? (Select top 5)* - Competitive Socialising Report 2023

The importance of ‘families’

42%...

...of respondents who have been to competitive socialising venues had children in their household ages 6-18

Of those with children 6-18 years old, nearly all would consider taking their children to a competitive socialising venue.



Source: KAM – Competitive Socialising 2023

Q. Have you taken your children to a competitive socialising venue? - Competitive Socialising Report 2023

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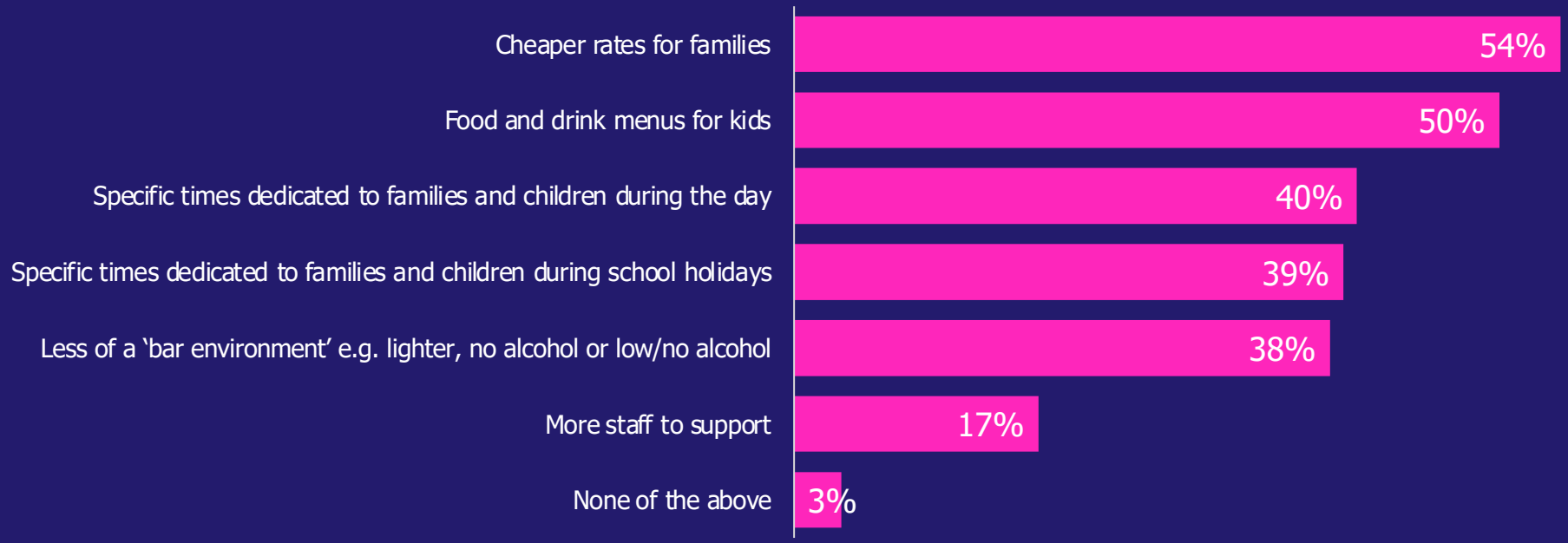
Winning the family spend

Of course attracting families to the venue may not be right for all venues, but it's an option to make the most of a space throughout the day. Venues wanting to achieve this should look at pricing structure and menu, as well as targeting key seasonal periods.



Source: KAM – Competitive Socialising 2023

Q. What would encourage you take you children to a competitive socialising venue more?

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Competitive Socialising is seeing the arrival to market of a more experience-led consumer generation, tech engagement and enhancing of the experience. Working patterns have changed, which has led to an increase in smaller gatherings and events, whilst we're seeing a demand from a new generation of consumers for entertainment and experiences.

Miguel Franco
Hospitality Operations Director, London Shuffle Club

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THE PATH TO DISCOVERY

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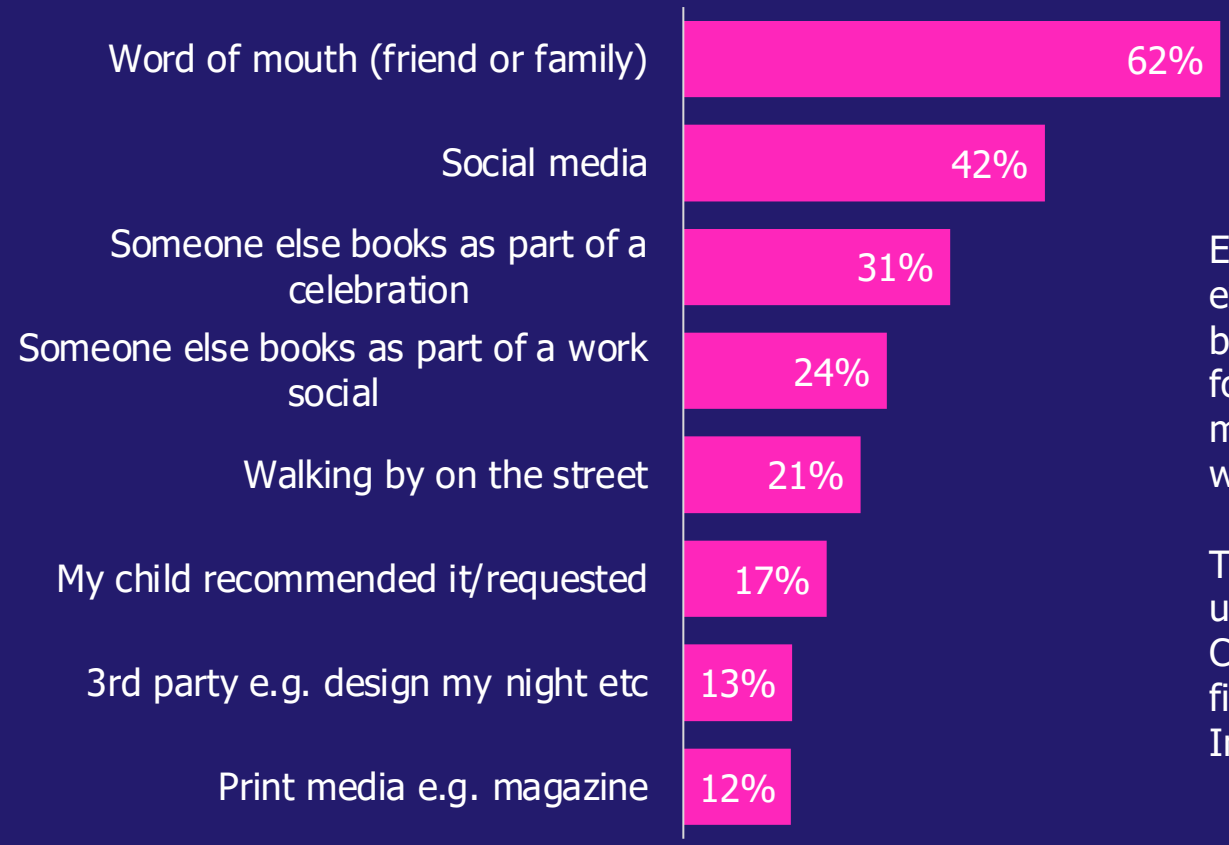
For many people, Competitive Socialising is a relatively unknown concept, so the discovery phase of their journey is critical for brands and operators to influence their path to purchase.

Driving awareness is the key to opening the door to increased footfall, and for the younger generation the master key resides within social media, and particularly Instagram and TikTok – both are incredibly powerful and influential in both how this generation discover new concepts and venues but also in how they interact and engage with a venue when they are there.

In this section we look at how venues can drive awareness and footfall, whilst taking a closer look at the methods by which they search for Competitive Socialising venues to visit, and the role that social media plays within their customer journey.

How to drive awareness and footfall

The top ways in which customers discover a competitive socialising venue



Encouraging trial and delivering a positive experience is key to growing the customers base with word of mouth the chief channel for discovery. Ensuring the venue is marketed and set up for celebrations and work socials is also key.

The role of social media, cannot be underplayed either, with nearly half of CompSoc goers discovering venues for the first time through here – make sure your Instagram and TikTok games are on point!

Source: KAM – Competitive Socialising 2023

Q. What would you say are the most likely/common way for you to discover a competitive socialising venue?

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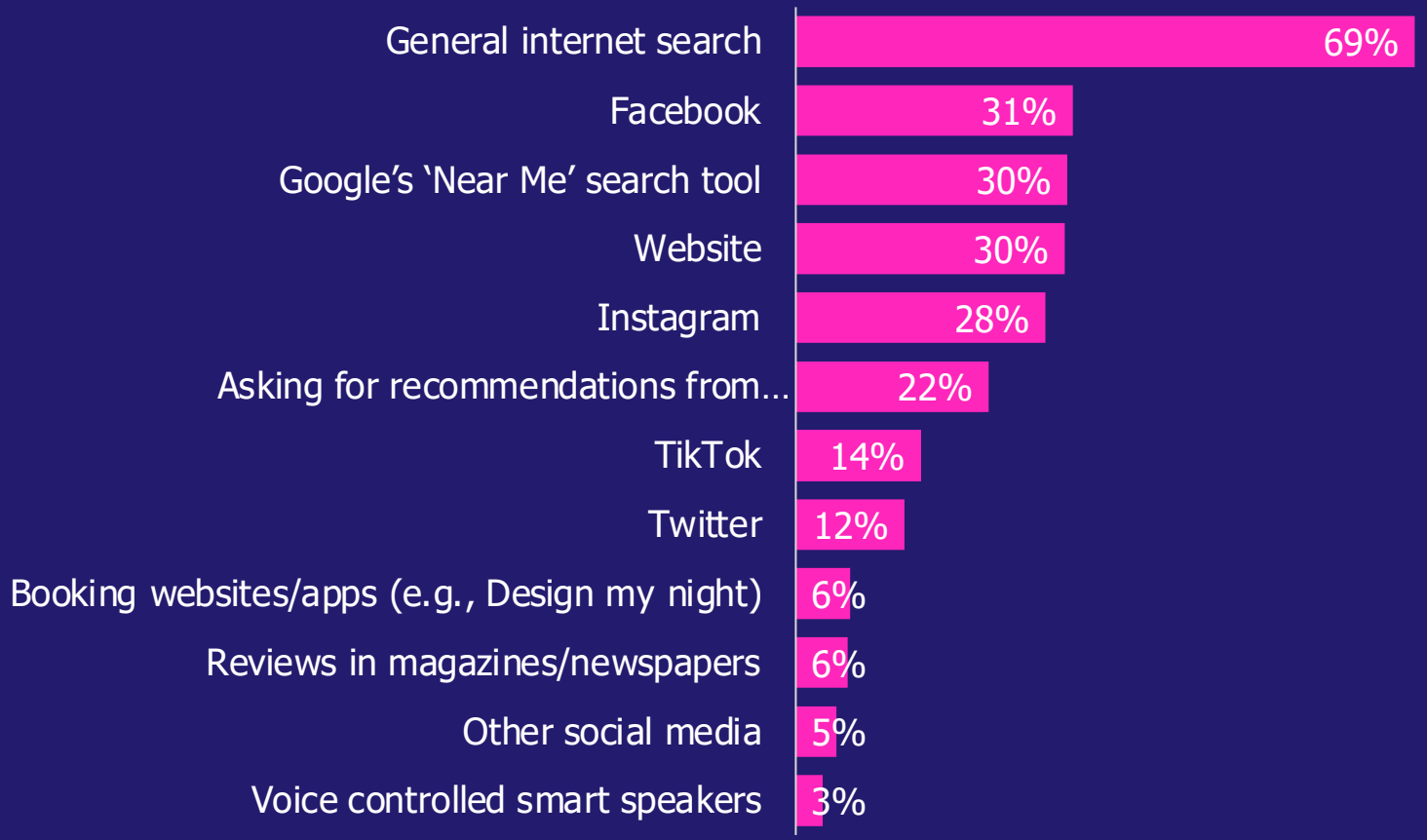
Customers are inquisitive

The top ways CompSoc goers research competitive socialising venues



60%

Have researched a venue before they visit

Despite social media playing a key role in discovery, it is more traditional, online methods that provide the source of information. Therefore, its important for venues to ensure they have engaging, informative websites and guaranteeing presence through SEO.

Source: KAM – Competitive Socialising 2023

Q. Have you used any of the following to find out information about competitive socialising venues in the past?

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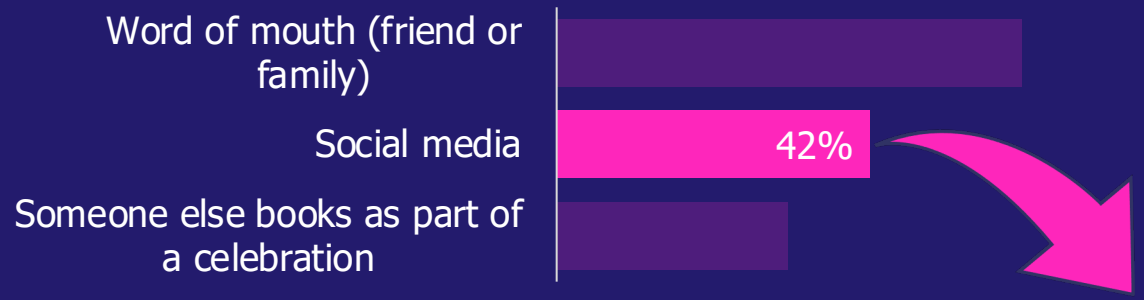
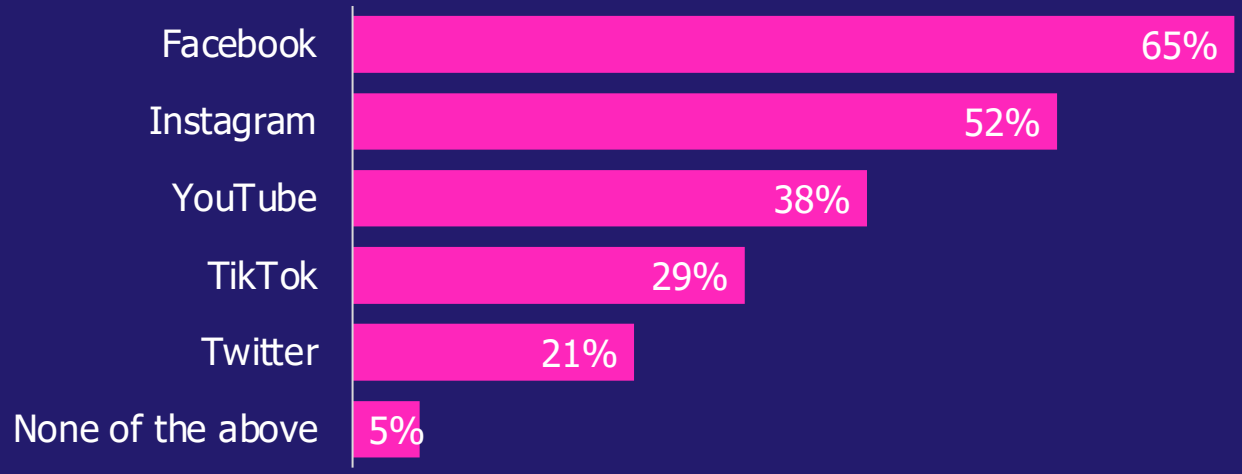
Social media is key for Gen Z



72% of 25-34 year olds who said they discovered venues on social media had done so through Instagram vs 52% of the total. Whereas only 25% of them had done so on TikTok, a huge drop off from those slightly younger.

85% of 18-24 year olds who said they discovered venues on social media had done so through TikTok vs 29% of the total. Whereas only 41% of them had done so on Facebook.



Source: KAM – Competitive Socialising 2023

Q. What would you say are the most likely/common way for you to discover a competitive socialising venue?
Q. What social media channels have you discovered a competitive socialising venue on?

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Lead time (for booking) has shortened

7.5 days

Q1 2022

3.4 days

Q1 2023

Source: Bums on Seats

Our friends at Bums on Seats shared data around ‘lead times’ for booking. They’ve seen a decrease year on year (which isn’t necessarily a good thing.)

The team at Bums on Seats suggested; “the lead times for key dates, occasions and celebrations are generally longer., so its important to ensure venues have them advertised and that they have sufficient packages to increase the spend per head, then you can create an experience within the CompSoc venue and drive revenue. Focussing on this and having a detailed strategy behind it can mean that the average group size can increase also.”

Interestingly KAM data shows people can be put off visiting CompSoc venues as many assume they can ONLY book in advance - is there an opportunity for highlighting when you have ‘same day’ availability?

BEING PART OF THE JOURNEY

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Over half of Competitive Socialising customers tend to visit other hospitality venues as part of their trip. Furthermore, these venues, sit mostly, either at the start or the middle of a day/night out. Ask yourself where are customers going before/ after us?

In this section we look at the the role that Competitive Socialising venues play in an average customers day/night out. How can brands and operators grab a larger share of this occasion spend, and what are the current barriers they need to overcome?

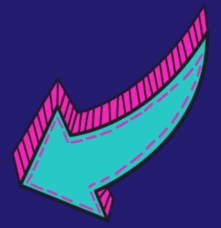
For these customers are not going home after they've left the venue – they're going and spending their money elsewhere.

CompSoc often plays a part in a wider social occasion for customer

54%...

...of competitive socialisers visit these venues as part of bar crawl or circuit with other bars or restaurants **(sometimes, often or always)**

How can competitive socialising venues improve their drinks/food offer to reduce these customers circuit repertoire by one – huge opportunity for unlocking additional revenue.



Source: KAM – Competitive Socialising 2023

Q. How often would you visit a competitive socialising venue as part of a circuit/crawl e.g., visit other bars or restaurant before or after?

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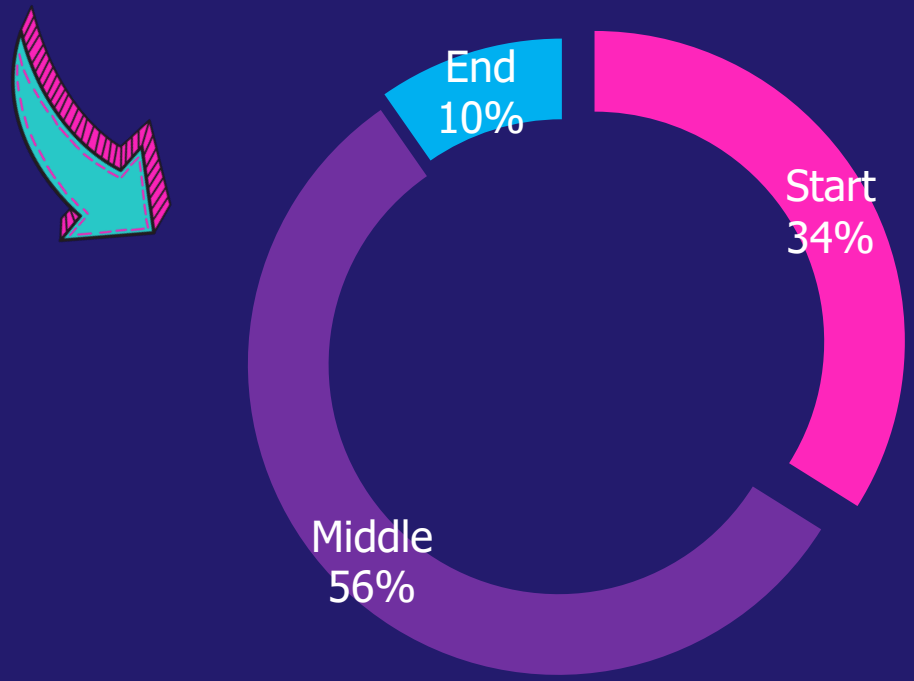
Where do CompSoc venues fit into the festivities?

Where would competitive socialising venues most likely fit as part of a crawl/circuit?



Venues should consider their current customer mix and understand times of day/days of the week in which they are typically quieter. Ask yourself where are customers going before/ after us?

Flexing the atmosphere (music/lighting), drinks range and food offer across day parts can help ensure customers stay for more rather than play and go, because more often than not they're not going home – they're going and spending their money elsewhere.

Source: KAM – Competitive Socialising 2023

Q. Where would a competitive socialising venue usually fit as part of a circuit/crawl – would it be at the start, in the middle or at the end?

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SOCIAL PLAYLIST

Most consumers are actively planning their nights out in the early evening from their smart phones. They make decisions quickly so need to be able to find out what you offer, where you are and why they should visit with a click and a scroll. The booking and payment process needs to be in as few clicks as possible, so that within a couple of minutes the booking is complete, and the correct expectation has been set for a great night out.

Jenn Hogg
Editor, Social Playlist

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THE IN-VENUE EXPERIENCE

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The in-venue experience is the bread and butter for Competitive Socialising. So, it's very encouraging to see the latest NPS data from Feed It Back show that in the last five months, Competitive Socialising is exceeding the rest of the industry, in terms of guest experience ratings in 2023.

In this section we analyse what customers want from the gaming experience, specifically, as well as how venues can look to improve both their food and drink offers to not only drive incremental spend but also ensure that customers see the venue as more than just a place to play games – focusing on the need to drive increased visit frequency and loyalty. Competitive Socialising can't just be for special occasions, it needs to hit every occasion in order to succeed.

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CompSoc is outperforming the wider hospitality industry in terms of NPS

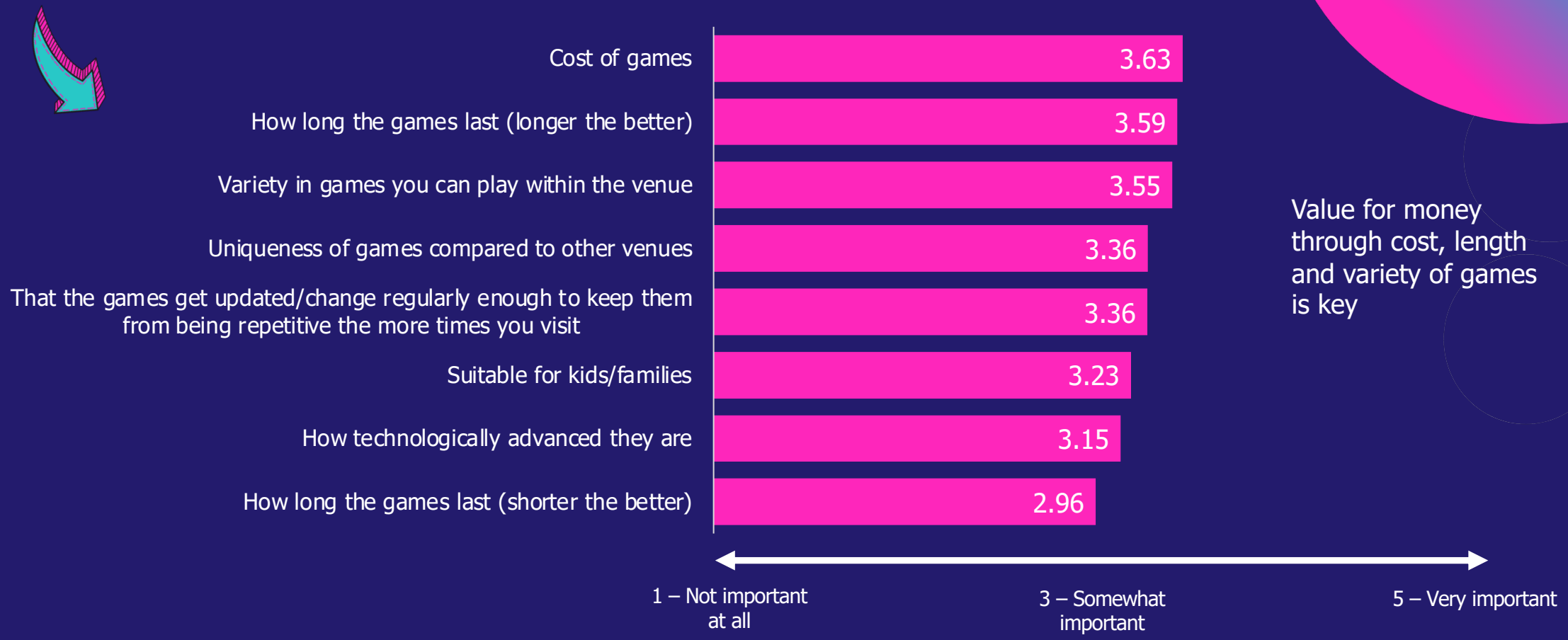
"Our friends at Feed It Back shared their NPS data with us and when benchmarking against the industry, its encouraging to see Competitive Socialising ahead of the industry, with the performance over Christmas particularly encouraging as we see a steeper drop in NPS for the industry during that Christmas silly season.

The last five months has seen competitive socialising pull away from the rest of the industry. In an industry seeing bad news almost daily regarding costs, staffing and guests pushing for more value for money, its safe to say that even in what are tough times for a lot of people, competitive socialising is a segment of the market that's nailing it in terms of guest experience in 2023!"

Source: Feed it Back

The perfect game

The most important factors that customers are looking for from competitive socialising games



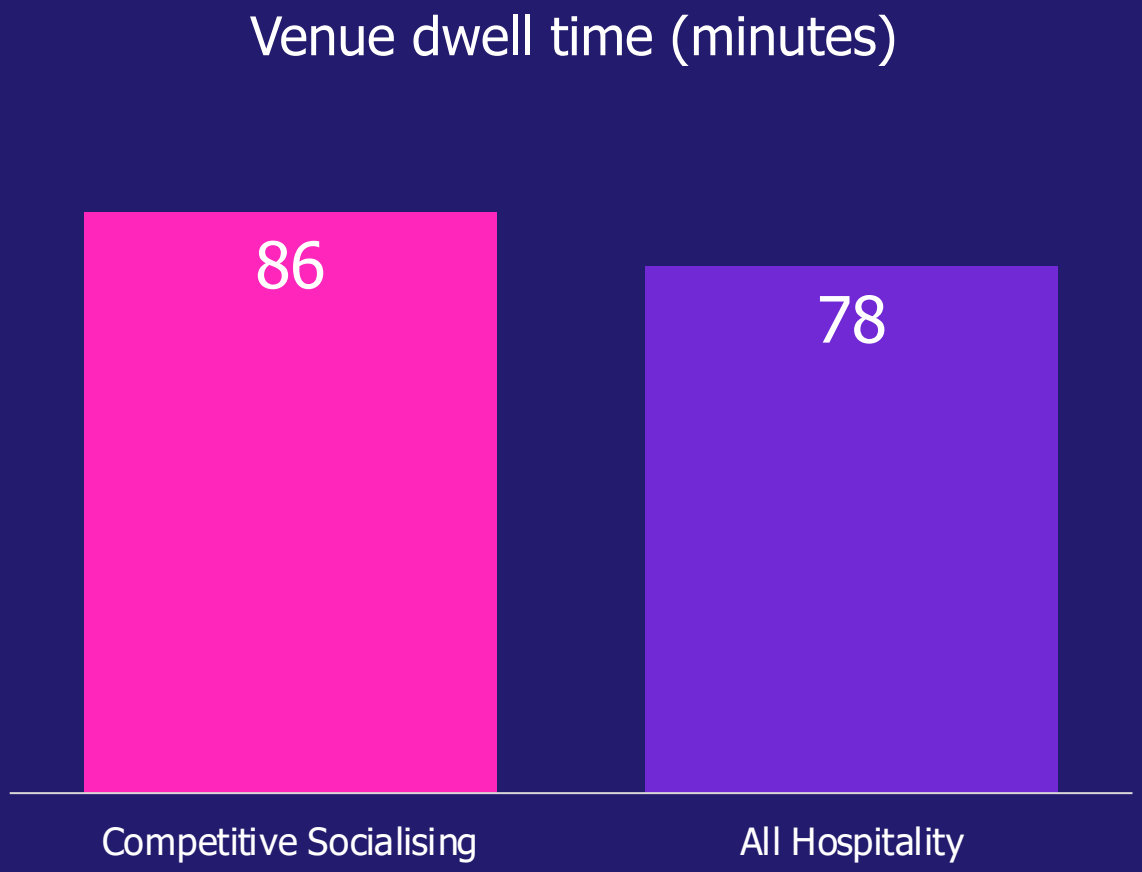
Value for money through cost, length and variety of games is key

Source: KAM – Competitive Socialising 2023

Q. Which types of 'games' or 'activities', are your favourite to play or do in a competitive socialising venue?

Wireless Social

Room for improvement in dwell time



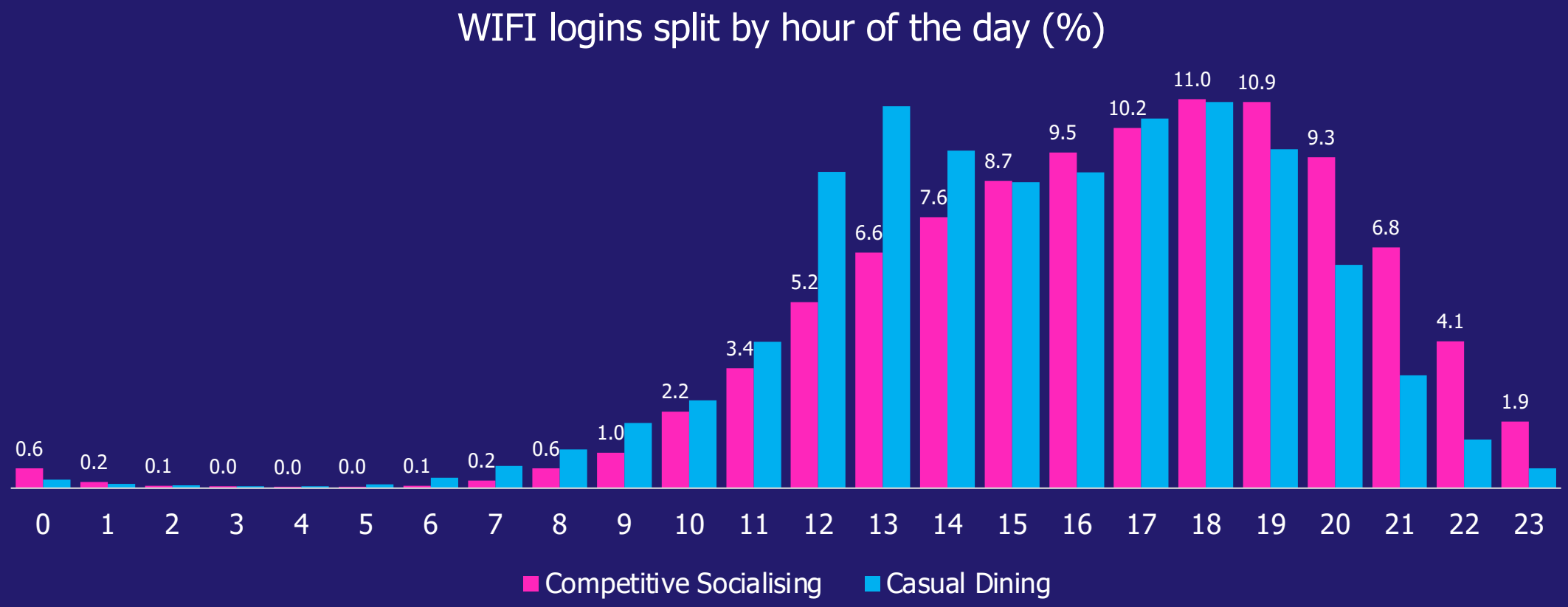
"Wireless Social have shared dwell time data, comparing competitive socialising venues with the rest of hospitality. On the surface, its great that competitive socialising on average has a longer dwell time, but there is no doubt this is an area of opportunity.

We know a large % of CompSoc goers are going to venues before or after they visit and that the location of CompSoc venue in relation other food and drink venues is comparatively important. Partner this with an 86-minute dwell time, there is a strong indication that through providing are more compelling food offering or an atmosphere that rivals, if not betters a late-night venue, may prevent customers from moving on and spending time elsewhere".

Source: Wireless Social (2023 – Q1)

Wireless Social

...and only 23% of time spent in CompSoc venues is from 8pm till close



Source: Wireless Social (2023 – Q1)

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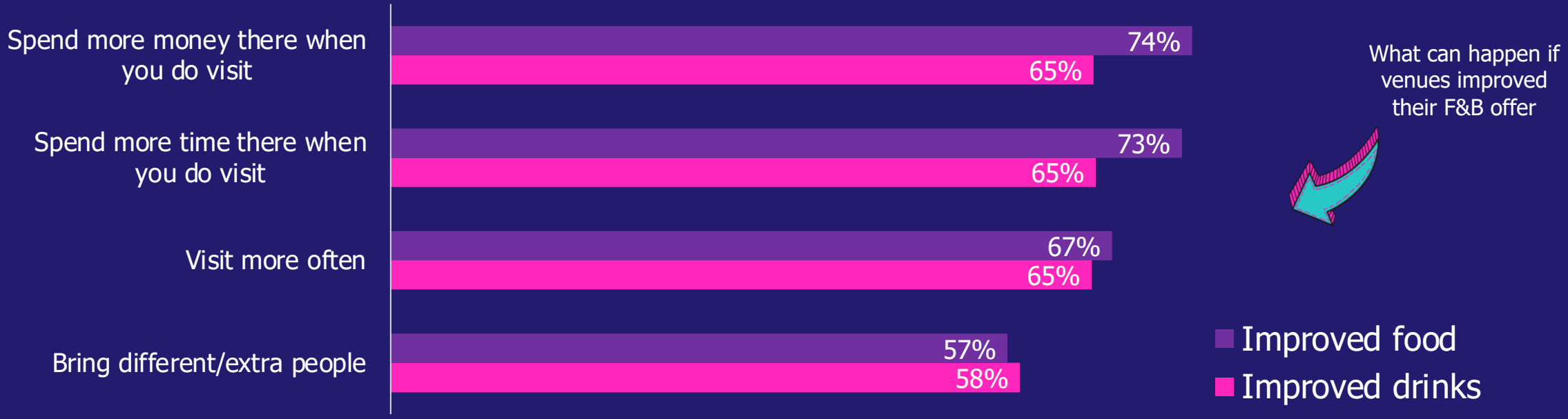
Improving F&B can equal big gains

Improving the food offering is more likely to influence customer behaviour compared to improving the drink offering, with almost 3 in 4 claiming it would increase the amount of time spent in venue and the amount of money spent. Considering that 9 in 10 customers are going somewhere after they visit a competitive socialising venue, this can prove a vital step in increasing dwell time and driving additional spend per head.



Source: KAM – Competitive Socialising 2023

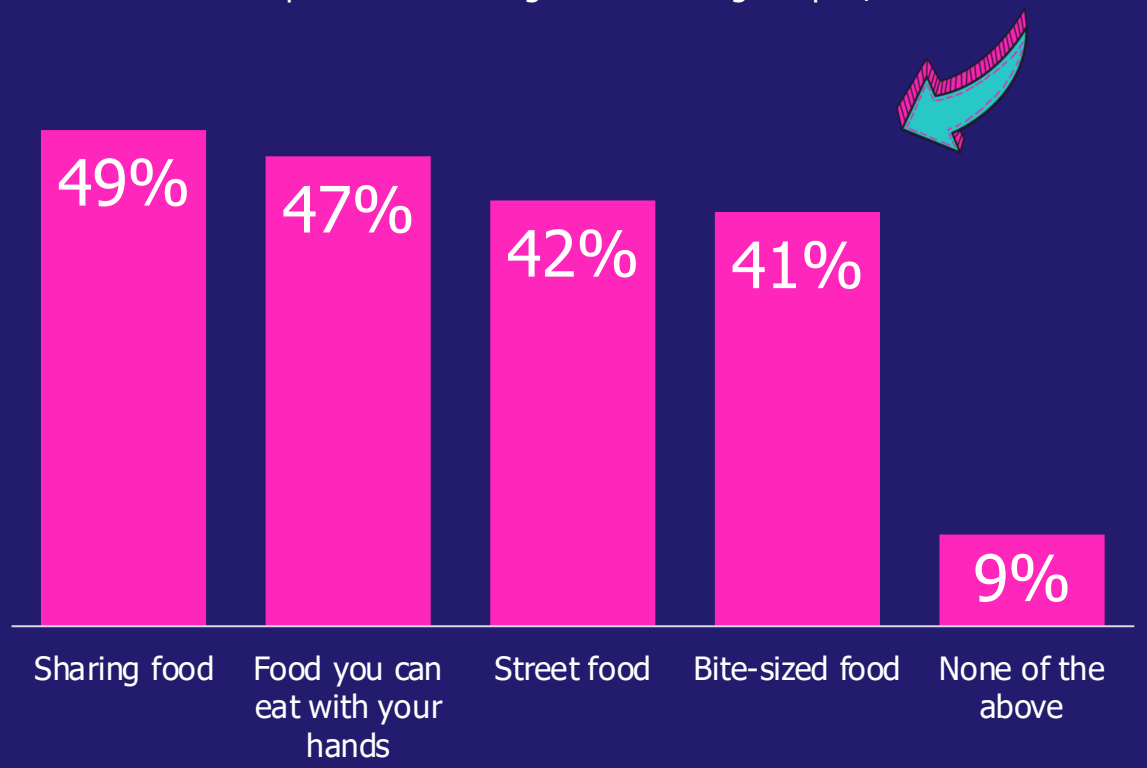
Q. Do you think that if competitive socialising venues improved their food/drink, that it would make you…?

What customers want food-wise

Adapting the food offering in some way is encouraged for competitive socialising venues

Sharing food (65%) and **street food (50%)** are much more popular amongst 25-34 year olds, but there is not one food type outlier, indicating venues that offer food have room to experiment and excite their customers.

Top food types that customers are MORE LIKELY to want in competitive socialising venues vs regular pub/bar

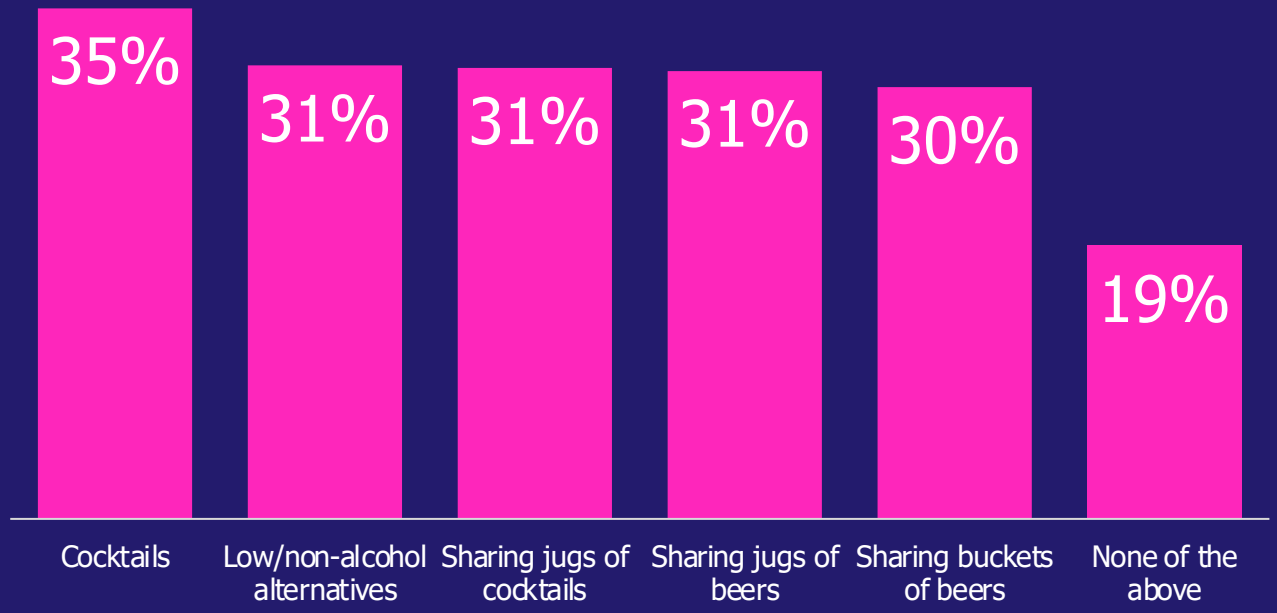


Source: KAM – Competitive Socialising 2023

Q. Are you more likely to want any of the following types of food when visiting competitive socialising venues compared with a regular pub or bar?

What customers want drink-wise

Top drinks that customers are MORE LIKELY to want in competitive socialising venues vs regular pub/bar



The drinks offering doesn't need to be vastly different to a regular pub or bar

Cocktails are particularly popular amongst the Gen Z customer with **59%** more likely to want cocktails and **44%** wanting jugs of cocktails. This indicates younger customers are more likely to see and use these these venues as separate or different to regular pubs or bars

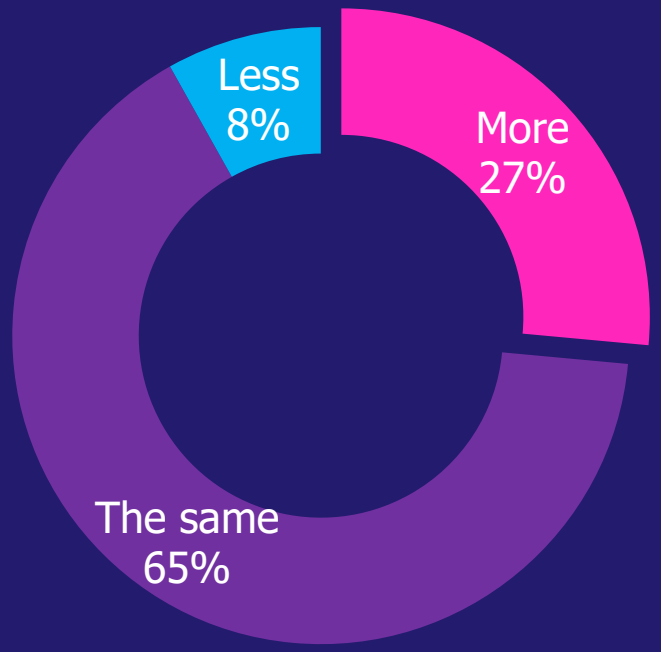
Source: KAM – Competitive Socialising 2023

Q. Are you more likely to want any of the following types of drinks when visiting competitive socialising venues compared with a regular pub or bar? (select all that apply) - Competitive Socialising Report 2023

KAM

Digital order & pay is a must have

Do customers think being able to order and pay for food and drink through your phone or a touchscreen is more or less important in a competitive socialising venue compared with a regular pub or bar?



1 in 4 feel the ability to order and pay at table is more important than in a regular pub or bar

Source: KAM – Competitive Socialising 2023

We have to keep up with evolving consumer trends to ensure that we remain relevant. Being aware of the types of games and experiences which are growing in popularity is key so that we can stay one step ahead and be at the forefront of the Competitive Socialising scene. We need to always be learning as the industry is moving at a rapid pace.

Competitive Socialising Operator

Source: KAM – Competitive Socialising 2023

THE OPPORTUNITY FOR WIDER HOSPITALITY

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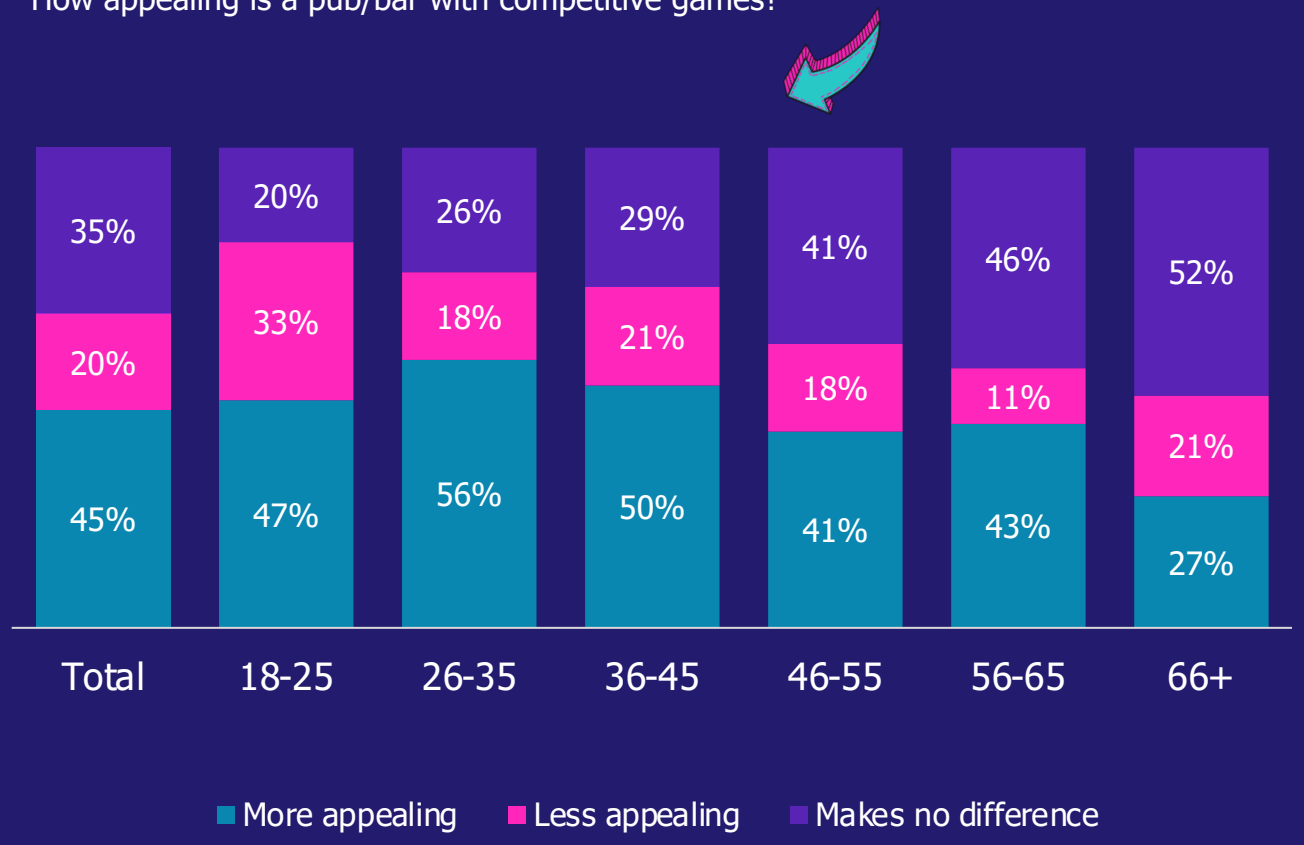
Of course, the majority of this research has focussed on dedicated Competitive Socialising venues, however there are a lot of learnings that traditional pub and bar venues can take. We've seen that the experience doesn't have to be 'all bells and whistles', but it's about creating an atmosphere and experience that is hard to replicate at home, and introducing an element of gaming to a pub or bar can be a great way to just elevate the current offer.

In this section we look at latest customer demand for competitive gaming within traditional pubs and bars and the opportunity that gamification of traditional venues can deliver across customer groups.

Encouraging 'activity-led' occasions can drive footfall

How appealing is a pub/bar with competitive games?



Almost half of competitive socialises think pubs/bars with competitive gaming makes them more appealing

If pubs are trying to bring in a younger audience, competitive gaming could help as ss those under 45 tend to find it particularly appealing. A third of 18-25 year olds would find it less appealing however, perhaps as they see these types of venues as an entirely separate offer

Source: KAM – Competitive Socialising 2023

Q. Does a pub/bar having competitive games in (i.e. pool, darts, shuffleboard, etc.) make it more or less appealing as a place to visit over a regular pub/bar? - Competitive Socialising Report 2023

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50%...

...of people said "I want to see more pubs and bars offer elements of competitive gaming"

Source: KAM – Competitive Socialising 2023

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KEY TAKEOUTS

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Top take outs

- The sector is growing, 32% are going more than they were last year and WIFI logins have increased by 21%.
- The occasions to visit a competitive socialising venues and the influences at play differ to a standard pub or bar. Events, ensuring it's a shareable experience, dates and work socials are comparatively important.
- Delivering a positive experience is key as word of mouth is the primary method of hearing about a venue (62%). However, customers are also inquisitive with 60% researching before they visit, highlighting the importance of a venues online presence.
- Its not about the destination, its about the journey. The majority of competitive socialisers visit these venues as part of a circuit or crawl, with most going somewhere after.
- Competitive socialising venues outperform casual dining on NPS, the sector is getting it right! When it comes to the games, value is delivered through a combination of the cost, the length, the variety and uniqueness of the games
- Half of competitive socialisers want to see regular pubs and bars bring some form of competitive gaming into their venue, something that is seen as particularly appealing for 26-35 year olds.

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COMPETITIVE SOCIALISING 2023

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