KAM

COMPETITIVE SOCIALISING 2024

Consumer trends for activity-led venues.

QUIZ!

INTRODUCTION

Competitive socialising is the much-needed break we all want from our busy lives. Ultimately, it consists of playing games over food and drink. It's a reason to bring friends and family together to laugh, have fun and create lasting memories - which is why it's no surprise that competitive socialising is so appealing to people of all ages and backgrounds.

Pool, darts and snooker are some of the most enduring and popular competitive socialising activities in the UK hospitality market. Many new venues have opened up in the last few years that are bringing these types of 'games' bang up to date. For example, crazy golf, shuffleboard, ten-pin bowling, axe throwing, virtual reality and much more!

This report aims to give a flavour of the customer who visits Competitive Socialising venues; who they are, why they visit and most importantly to identify opportunities for venues and Competitive Socialising brands to drive footfall, improve their experience and grow spend and loyalty.

The data in this report is based on online interviews with 600 UK adults who had visited a Competitive Socialising venues in the last 12 months.
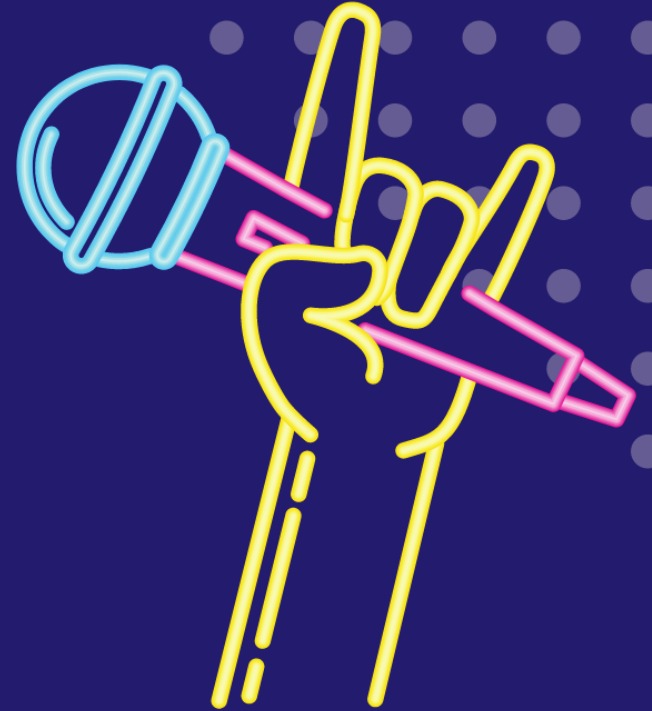
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Overall sector interaction

Number of competitive socialisers

30%...

...of the UK adult population have previously 'been' to a competitive socialising venue (nationally representative sample)

Headroom is there to grow

57%
of those who haven't been said they would consider it in the future.

Not being **aware**, not having any in the **area** or not having a **group to go with** are the 3 most cited reasons for not having been!

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Customer visit patterns

On average, competitive socialising customers visit venues 1.2 times per month.

Sporadic

Occasional

Regular

| 12% | 7% | 15% | 17% | 12% | 7% | 31% |
| Once a week or more | Once a fortnight | Once a month | Once every 1-3 months | Once every 4-6 months | Once every 7-12 months | Once a year or less |
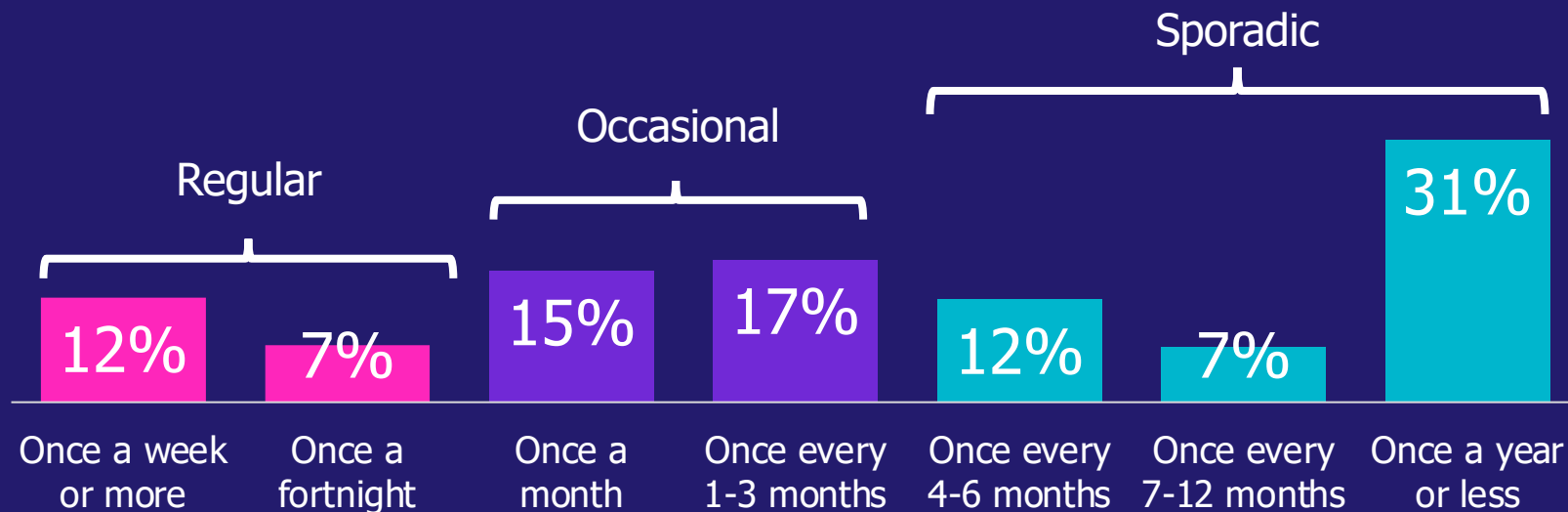
Q. How often do you visit competitive socialising venues? - Competitive Socialising Report 2024

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Who are the 'loyalist' CompSoc visitors?

Segment	Index
18-25	154
26-35	147
36-45	128
Male	121
£35K-£50K	113
Midlands & Wales	109
£75K+	106
£50K-£75K	104
The South & London	104
<£35K	95
The North, NI & Scotland	88
46-55	82
Female	80
66+	55
56-65	46

This index shows who are the most frequent visitors to competitive socialising venues. Any score over 100 means that segment are more likely to be 'loyal' than than those under 100.
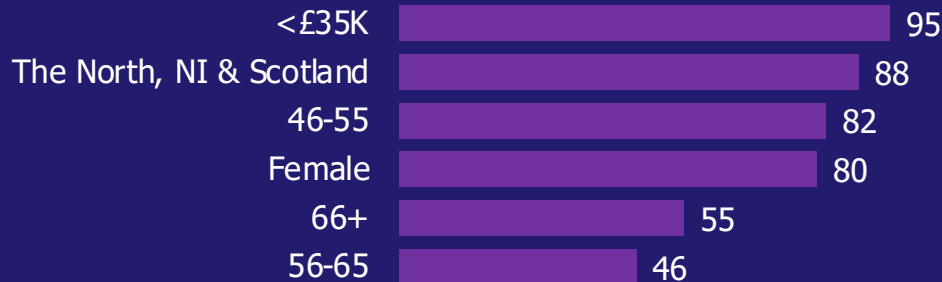
Loyal visitors are more likely to be younger, male, affluent and from the midlands or southern UK.

Results indexed vs total CompSoc goers.

26%...

...of Comp Soc customers are visiting competitive socialising venues **MORE OFTEN** than they were last year. (24.5% say they are visiting less.)

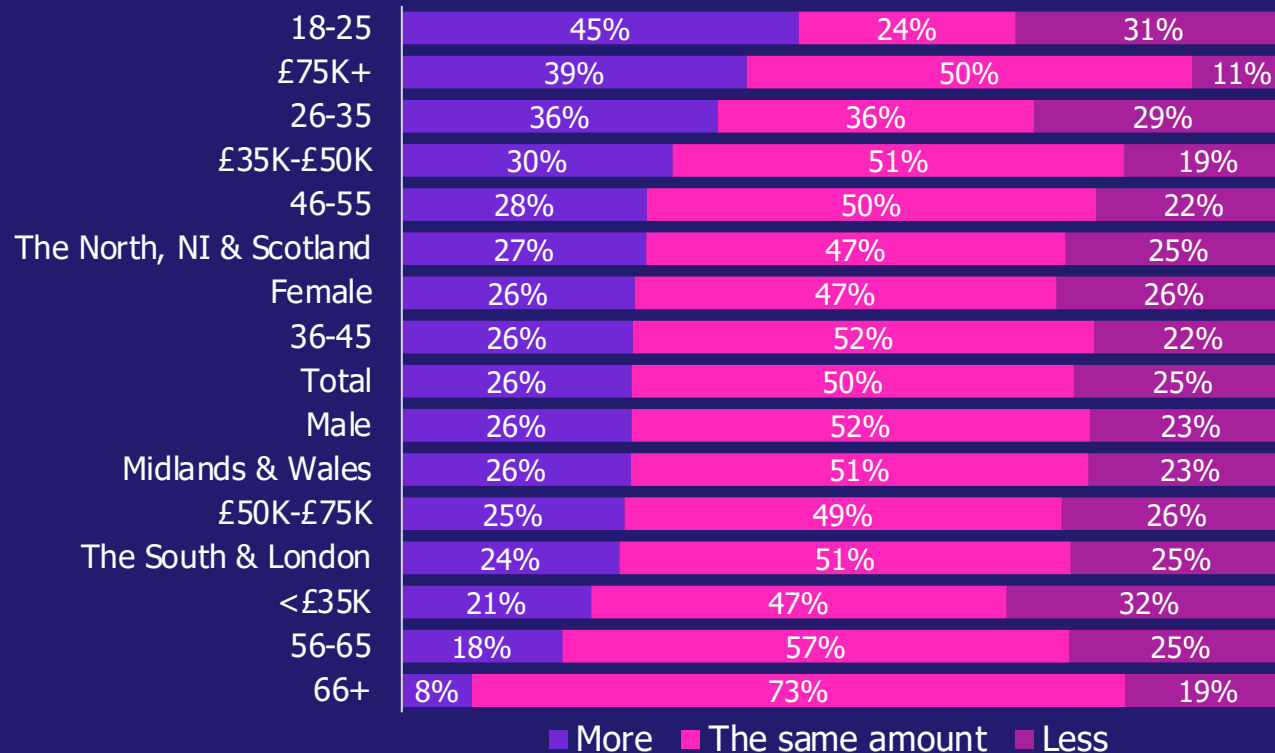Given that last year 32% were visiting more and 22% less, this suggests that the sector is starting to mature but also we know the pressure of cost of living crisis is also be having an impact, further highlighting the importance of delivering value for money.

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Which customers are visiting more often than last year?

Category	More	The same amount	Less
18-25	45%	24%	31%
£75K+	39%	50%	11%
26-35	36%	36%	29%
£35K-£50K	30%	51%	19%
46-55	28%	50%	22%
The North, NI & Scotland	27%	47%	25%
Female	26%	47%	26%
36-45	26%	52%	22%
Total	26%	50%	25%
Male	26%	52%	23%
Midlands & Wales	26%	51%	23%
£50K-£75K	25%	49%	26%
The South & London	24%	51%	25%
<£35K	21%	47%	32%
56-65	18%	57%	25%
66+	8%	73%	19%

■ More ■ The same amount ■ Less

Growth in the sector is also coming from the Gen Z age group.

However, higher income individuals are also visiting more compared to those who earn <£35k, indicating that disposable income is playing a role in visit frequency.

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Reasons for not visiting as often...

The cost of going out in general — 45%

Location (there isn't one that is conveniently near to me) — 32%

The cost of visiting comp soc venues compared to standard pubs and bars — 29%

Finding enough other people who also like playing the games — 19%

Having to always book in advance (can't just turn up) — 19%

I don't enjoy competitive socialising — 10%

They can get boring as the games don't change — 8%

They aren't 'family' friendly — 6%

Location is down from 37% last year, perhaps an indication that new venues and concepts are reaching more areas of the UK.

The **cost and location** are the two main reason that prevent people from visiting as often as opposed to the concept itself.

How can venues get creative with pricing that encourages repeat visits perhaps in quieter periods?

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

Source: KAM - Competitive Socialising Report 2024
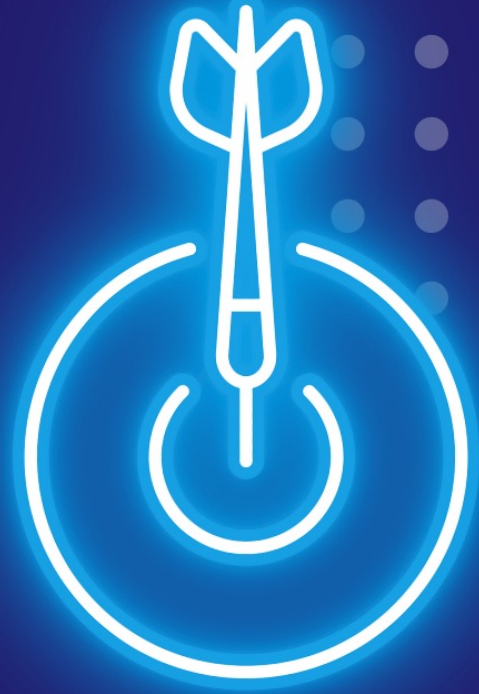
Key take-outs
Sector interaction

o There is headroom to attract new customers to the sector, with over half of those who haven't ever been to a Competitive Socialising venue saying they'd consider it in the future with awareness and convenient locations the main hurdles to overcome.

o The impact of the cost-of-living crisis is the main barrier to competitive socialisers visiting more often, highlighting that delivering value for money is a particularly high priority in this sector.

o With the sector maturing, visit frequency stabilising and the financial pressures, people are being more selective and looking for options. Therefore, it is important to assess how venues stack up against wider hospitality which is addressed in the next section.
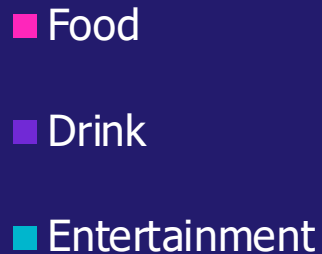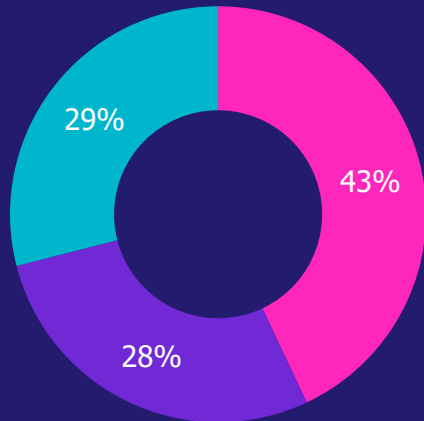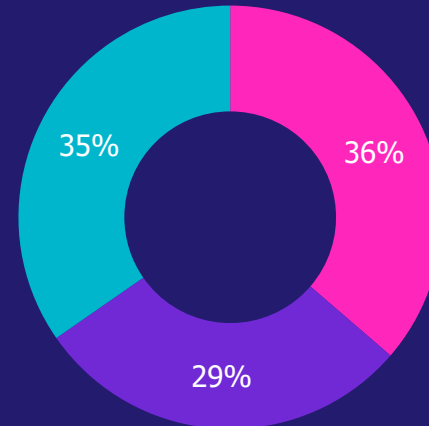
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Competing for spend

A good food and drink offering is important to support venues in competing for spend with wider hospitality. Spend on drinks is more resistant to financial pressures than entertainment and the % monthly spend on entertainment is some way behind food. Therefore, this indicates that to be driving spend per head and encouraging people to visit when money is tight, food and drink is integral.

% split of monthly spend on 'going out'

- 29%
- 43%
- 28%

Legend:
- ■ Food
- ■ Drink
- ■ Entertainment

Which spend would you reduce if money was tight?

- 35%
- 36%
- 29%

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Q. In an average month, how do you split the money you spend on going out for food, drinks and entertainment?
Q. If money was tight and you had to reduce your spend in one of the below, which would it be?

Source: KAM - Competitive Socialising Report 2024

If you had to cancel one...

Competitive socialising venues are more vulnerable than traditional hospitality when visitors are planning a night out with multiple venues. Despite the growth of the sector, when pitted against more traditional venues, it is slightly more dispensable, once again, showcasing the importance of continuing to improve the offer.

30%

34%

36%

Restaurant

Bar/pub

Competitive socialising venue

26–35-year-olds (19%) and regular comp soc visitors (21%) would be much less likely to cancel the competitive socialising venue

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Q. If you were planning a night out with friends and you had a restaurant, a bar/pub and a competitive socialising venue lined up BUT you had to cancel one of them due to a lack of time, which one would you remove from your night out?

Planning the night out

Last year 54% of comp soc visitors 'sometime', 'often' or 'always' visited comp soc venues as part of a crawl or circuit with other restaurants, pubs or bars. We also know competitive socialising venues and entertainment is vulnerable due to a lack of money or time. Knowing that competitive socialising venues are most likely to visited last when on a crawl showcases the importance of trying to get people to visit one drink earlier or have to a bite to eat, rather than just increasing dwell time or spend but overall.

Venue	Visit 1st	Visit 2nd	Visit 3rd
Restaurant	43%	34%	23%
Bar/pub	33%	33%	34%
Competitive socialising venue	25%	33%	43%

■ Visit 1st   ■ Visit 2nd   ■ Visit 3rd

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Q. If you were planning a night out with friends and you had a restaurant, a bar/pub and a competitive socialising venue lined up, in which order would you visit them?
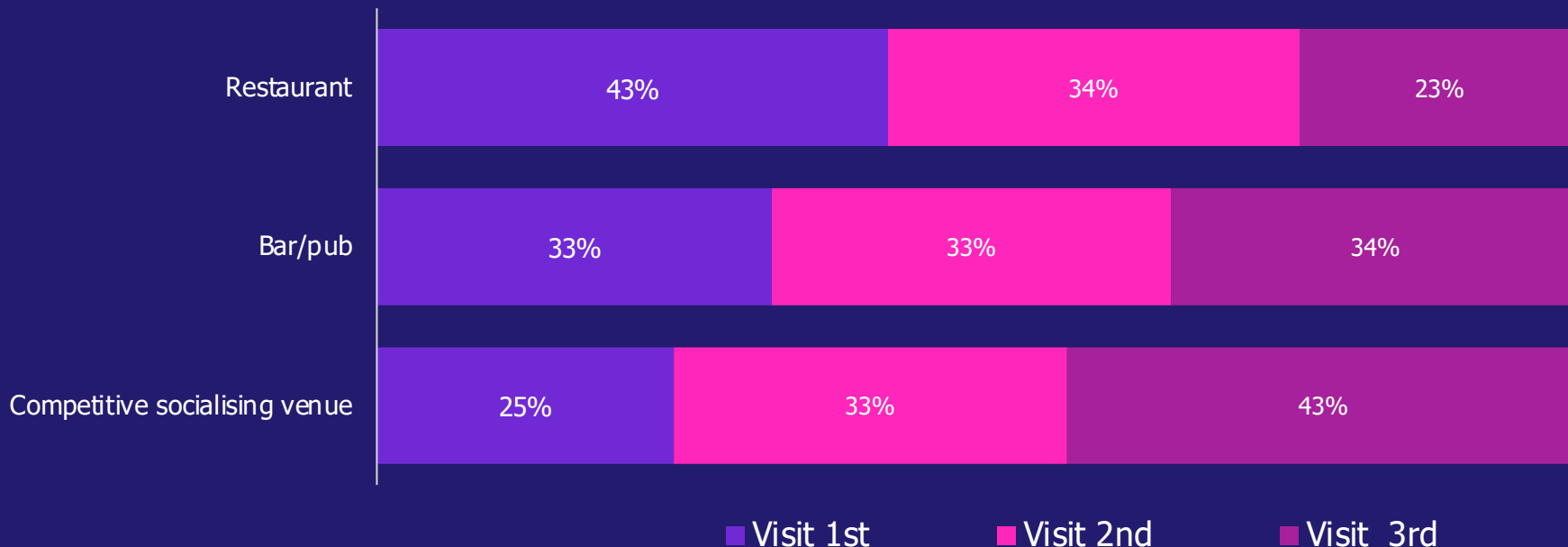
Key take-outs
Competing for hospitality spend

o Entertainment spend is most at risk. Monthly 'going out' spend on entertainment is similar to that of spend on drink but below food. However, if / when money is tight, entertainment spend is more likely to be reduced than spend on drink.

o When planning a night out, competitive socialisers would be more likely to cancel CS venues than restaurants and pubs / bars if they had a lack of time, highlighting the need to offer a better experience.

o We know many visits to comp soc venues also involve a visit to another venue before or after. In this case, the competitive socialising venue is most likely to be last. Not just focusing on dwell time or spend per head, but giving the reason to visit for a wider selection of occasions such as just a meet up with friends is key! The next section shows how to do this...
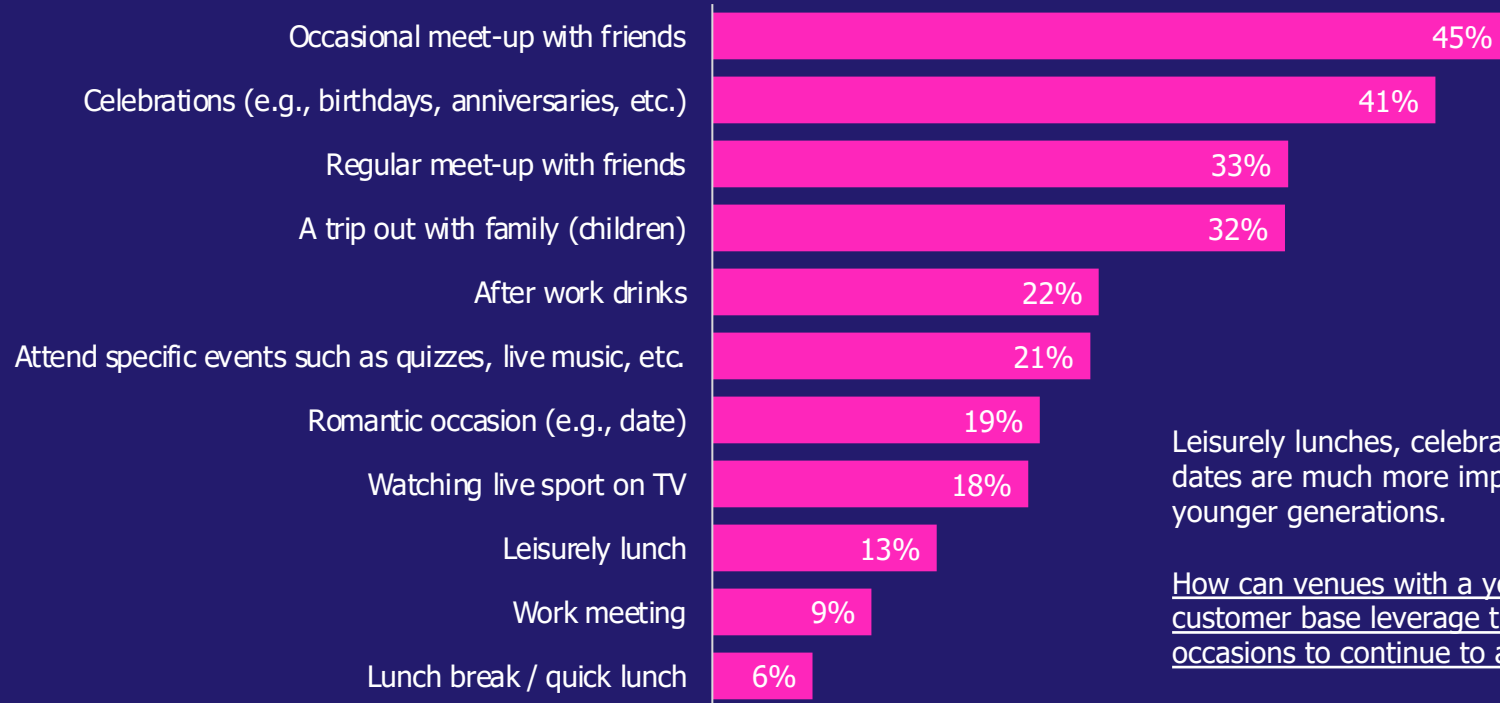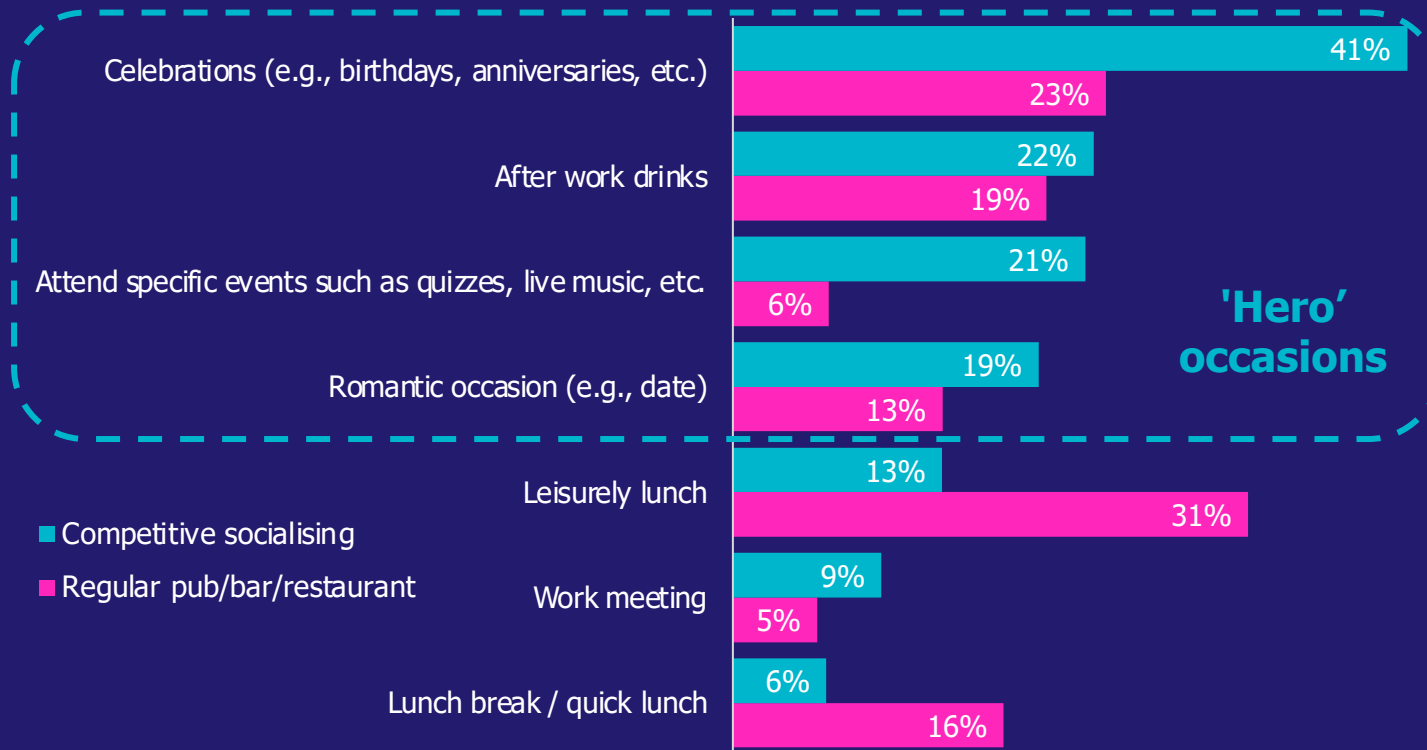
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Deep dive into occasions

Why people go to an activity-led venue

Occasion	Percentage
Occasional meet-up with friends	45%
Celebrations (e.g., birthdays, anniversaries, etc.)	41%
Regular meet-up with friends	33%
A trip out with family (children)	32%
After work drinks	22%
Attend specific events such as quizzes, live music, etc.	21%
Romantic occasion (e.g., date)	19%
Watching live sport on TV	18%
Leisurely lunch	13%
Work meeting	9%
Lunch break / quick lunch	6%

Leisurely lunches, celebrations and dates are much more important to younger generations.

How can venues with a younger customer base leverage these occasions to continue to attract them?

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Q. Which of the following 'occasions' would you consider visiting a competitive socialising venue for?

For what occasions do people visit an activity-led venue vs a regular venue?

Celebrations (e.g., birthdays, anniversaries, etc.)
- 41%
- 23%

After work drinks
- 22%
- 19%

Attend specific events such as quizzes, live music, etc.
- 21%
- 6%

Romantic occasion (e.g., date)
- 19%
- 13%

'Hero' occasions

Leisurely lunch
- 13%
- 31%

■ Competitive socialising
■ Regular pub/bar/restaurant

Work meeting
- 9%
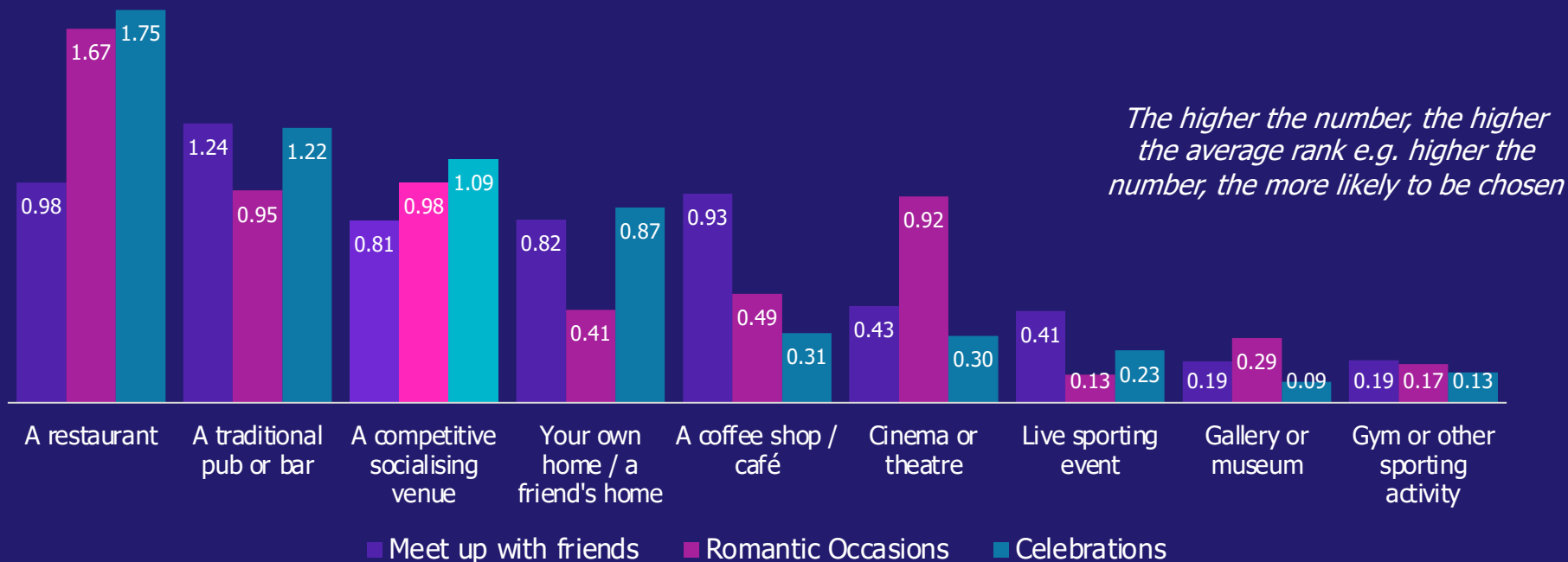- 5%

Lunch break / quick lunch
- 6%
- 16%

Comparing the results to KAM's Plan to Plate research, the point of difference for CS venues vs regular pub, bars and restaurants is providing a venue for celebrations, events and date night.

Are we happy as a sector for being seen as a place for special occasions? There are only so many in a year.

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Preferred venue type by 'occasion'

Competitive socialising does not rank highly as a venue for a 'meet up with friends'. Comp soc visitors were more likely to choose a home or a café to meet their friends than go to a competitive socialising venue, showcasing the challenge to grow visit frequency.

The higher the number, the higher the average rank e.g. higher the number, the more likely to be chosen

Venue	Meet up with friends	Romantic Occasions	Celebrations
A restaurant	0.98	1.67	1.75
A traditional pub or bar	1.24	0.95	1.22
A competitive socialising venue	0.81	0.98	1.09
Your own home / a friend's home	0.82	0.41	0.87
A coffee shop / café	0.93	0.49	0.31
Cinema or theatre	0.43	0.92	0.30
Live sporting event	0.41	0.13	0.23
Gallery or museum	0.19	0.29	0.09
Gym or other sporting activity	0.19	0.17	0.13

■ Meet up with friends   ■ Romantic Occasions   ■ Celebrations

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Q. Please rank the following venue types in order of where you would most likely choose to go for [meeting up with friends / celebrations / romantic occasions]?

Source: KAM - Competitive Socialising Report 2024

Lead time (for booking) is back up again

BUMS on SEATS

7.5 days

Q1 2022

3.4 days

Q1 2023

7.1 days

Q1 2024

Our friends at Bums on Seats shared data around 'lead times' for booking. The increase to 7.1 days vs 3.4 days last year aligns to 'hero' occasions identified, which are planned, larger occasions, requiring a booking further in advance.
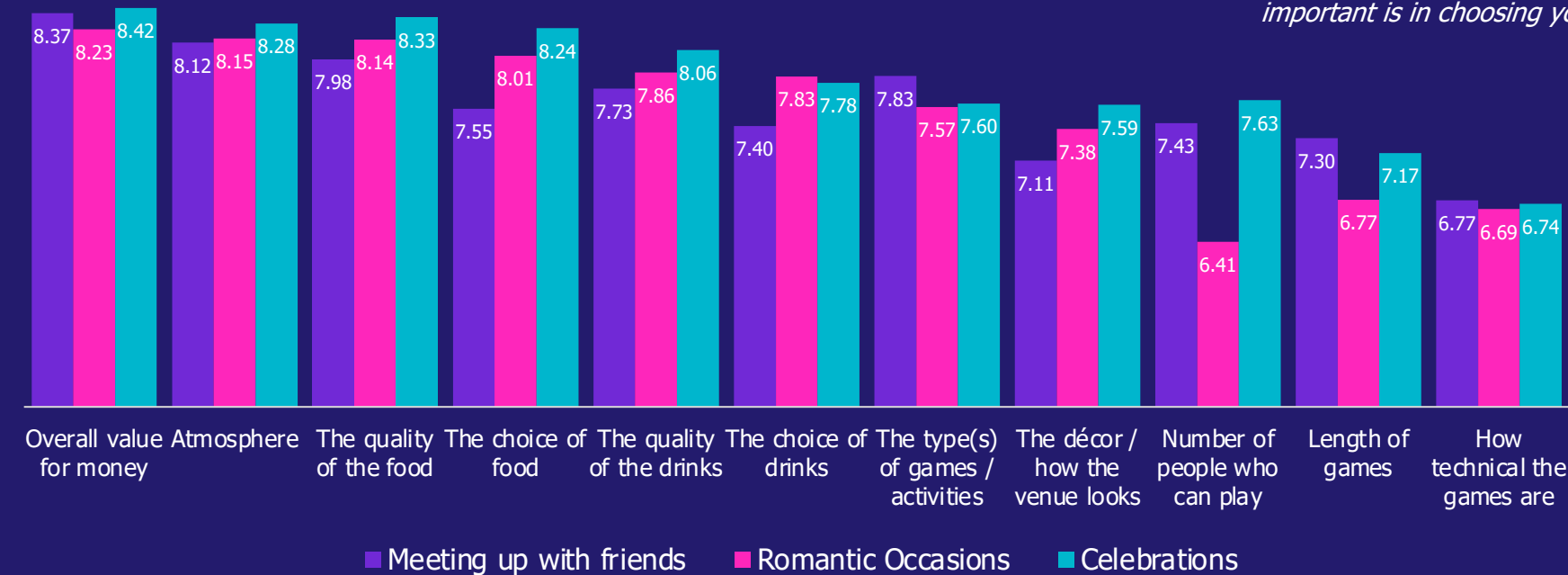
The team at Bums on Seats suggested; "This shows a change in consumer behaviour to immediate post-pandemic levels, where there was excitement and a need to reserve. That the level of demand has increased to previous levels is a real positive sign for the sector, as guests are realising and changing behaviour to book earlier to ensure they can get a reservation."

This story is a double-edged sword. Of course, it is great that people are thinking about competitive socialising in advance and booking. The sector can be trusted with the big-ticket occasions. However, we need to make sure that it can also deliver on the spontaneous, casual occasions.

Choosing venue by 'occasion'

Given there is a challenge to get comp soc visitors to choose competitive socialising venues for 'meeting up with friends' it is important to focus on what is important when visiting for this occasion. Games and elements of the games become more important when meeting up friends, presumably to bring variation and excitements that fit the group. **Is the game interesting? Can I play with 2 or 6 mates? Can I play for 15 minutes and 2 hours?**

The higher the number the more important is in choosing your venue

Factor	Meeting up with friends	Romantic Occasions	Celebrations
Overall value for money	8.37	8.23	8.42
Atmosphere	8.12	8.15	8.28
The quality of the food	7.98	8.14	8.33
The choice of food	7.55	8.01	8.24
The quality of the drinks	7.73	7.86	8.06
The choice of drinks	7.40	7.83	7.78
The type(s) of games / activities	7.83	7.57	7.60
The décor / how the venue looks	7.11	7.38	7.59
Number of people who can play	7.43	6.41	7.63
Length of games	7.30	6.77	7.17
How technical the games are	6.77	6.69	6.74

■ Meeting up with friends ■ Romantic Occasions ■ Celebrations

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Q. If you were picking a competitive socialising venue for [meeting up with friends / romantic occasions / celebrations] how important (on a scale of 1-10, where 1 is very unimportant and 10 is very important) would the following factors be in choosing your venue?
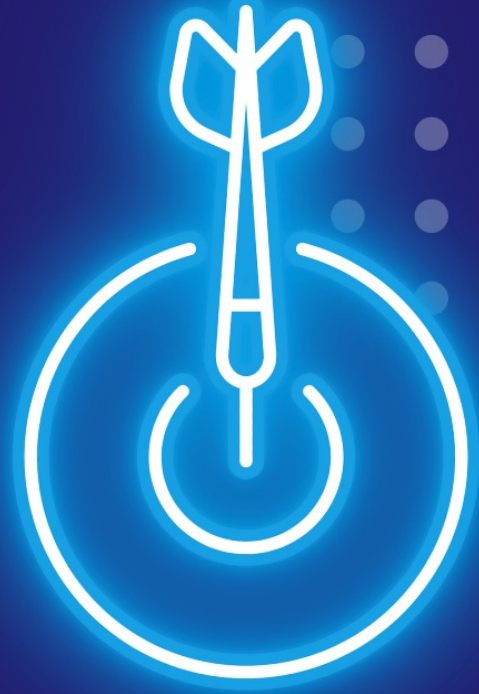
Key take-outs
Deep dive into occasions

○ Although using Competitive Socialising venues to 'meet up with friends' is the top occasions, the sector's real point of difference is attracting customers for 'celebrations', 'special events' and 'romantic occasions.'

○ For a casual 'meet up with friends', are more likely to choose a restaurant, a bar, even a coffee shop or at home before choosing a Competitive Socialising venue. Price is likely to be a factor in this. Making venues more suitable for the more casual, frequent occasions could help counteract this.

○ Depending on the occasion, certain elements of the venue are more or less important. Food is particularly important for 'celebrations', whereas features around the game are more important when 'meeting up with friends', something we will look at in the next section.
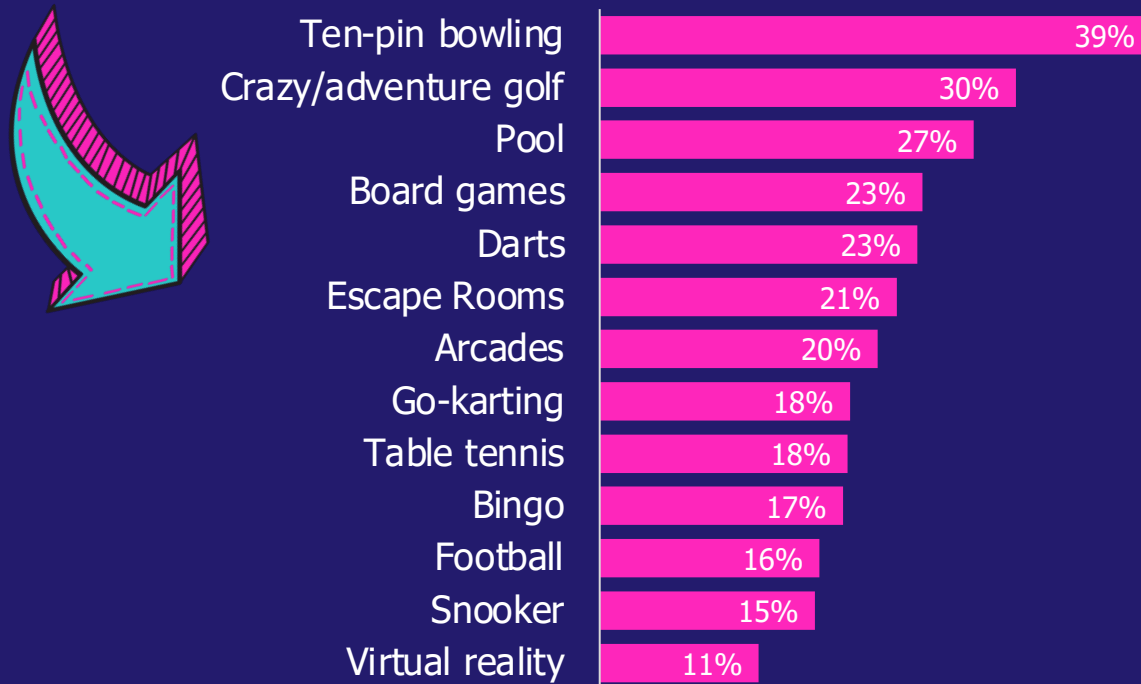
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Focus on the games / activity

The most popular games

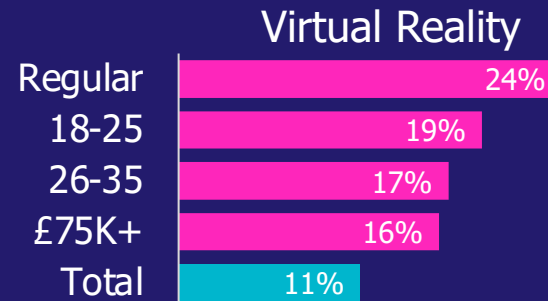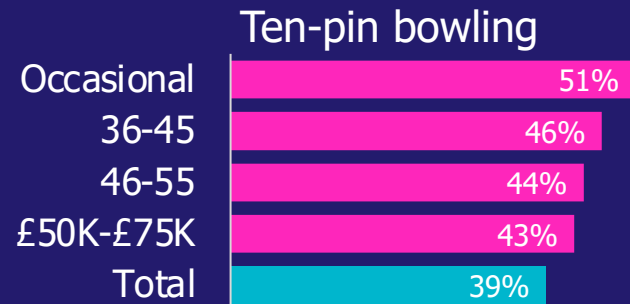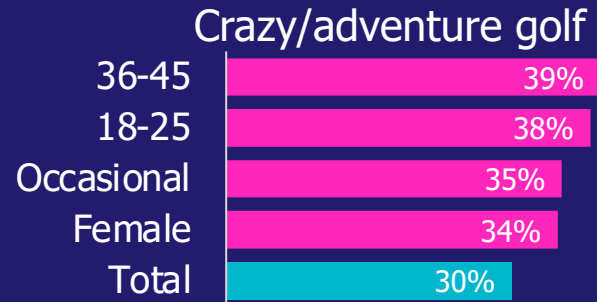The 'most loved' games according to CompSoc goers:

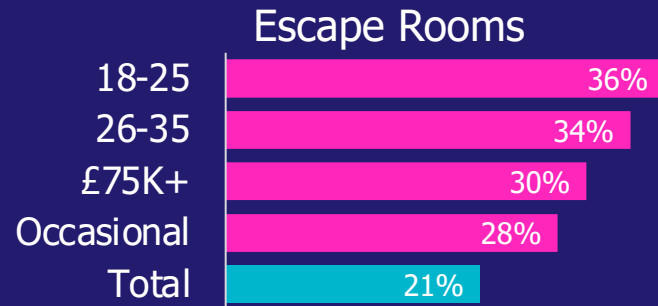| Game	Percentage
Ten-pin bowling	39%
Crazy/adventure golf	30%
Pool	27%
Board games	23%
Darts	23%
Escape Rooms	21%
Arcades	20%
Go-karting	18%
Table tennis	18%
Bingo	17%
Football	16%
Snooker	15%
Virtual reality	11%

'Classic' gaming concepts still prove most popular with customers, perhaps as they provide an entry point for the older generations, through familiarity, whilst also being accessible to younger generations.

Venues that are able to add unique twists to these classic gaming concepts through enhanced gamification and introduce technological advances are those that can bring these classic games into the modern entertainment space.

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

Who loves which games?

Looking at 4 specific games / activities that resonate with a specific audience, it highlights the importance to choose the right game to introduce or add to a venue to align to the objectives of the business. For example, if a comp soc venue with a Gen Z audience with a loyal customer base wanted to add in another game, virtual reality would work well!

Escape Rooms

18-25	36%
26-35	34%
£75K+	30%
Occasional	28%
Total	21%

Crazy/adventure golf

36-45	39%
18-25	38%
Occasional	35%
Female	34%
Total	30%

Ten-pin bowling

Occasional	51%
36-45	46%
46-55	44%
£50K-£75K	43%
Total	39%

Virtual Reality

Regular	24%
18-25	19%
26-35	17%
£75K+	16%
Total	11%

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

Source: KAM - Competitive Socialising Report 2024

Biggest climbers in popularity vs last year

Last year, virtual games or activities over indexed with the most frequent competitive socialisers. It would appear these type of games have become even more into the mainstream with the fastest growth. Classic concepts that bring in technology such as augmented reality is a potential way to bridge this gap.

+22%	+18%	+13%	+9%
Virtual golf	Virtual reality	Virtual shooting	Shuffle-board

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

Multiple-activity venues are popular

People like variation. When they visit the venues the venues, they like options and flexibility, particularly for Gen Z.

Have you been to a venue with multiple activities?

- Yes
- No

46%
54%
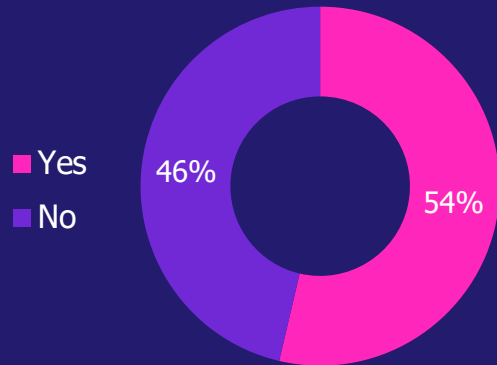
83% of those under 35 have been to a venue offering multiple activities compared to 24% of those over 55, strongly indicating that the having the ability to play multiple games / activities in a single visit is desirable for younger visitors

Did you take part in multiple activities in the same visit?

- Yes
- No
- I didn't take part in any

2%
21%
78%
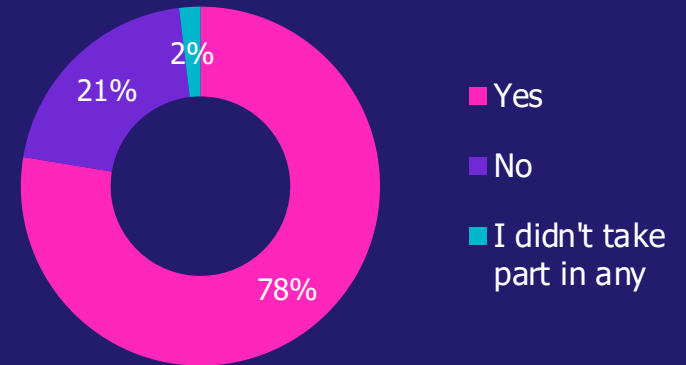
Regardless of whether people have been to a venue with multiple activities or not, 57% said they prefer it, with 17% saying they prefer a venue dedicated to one activity.
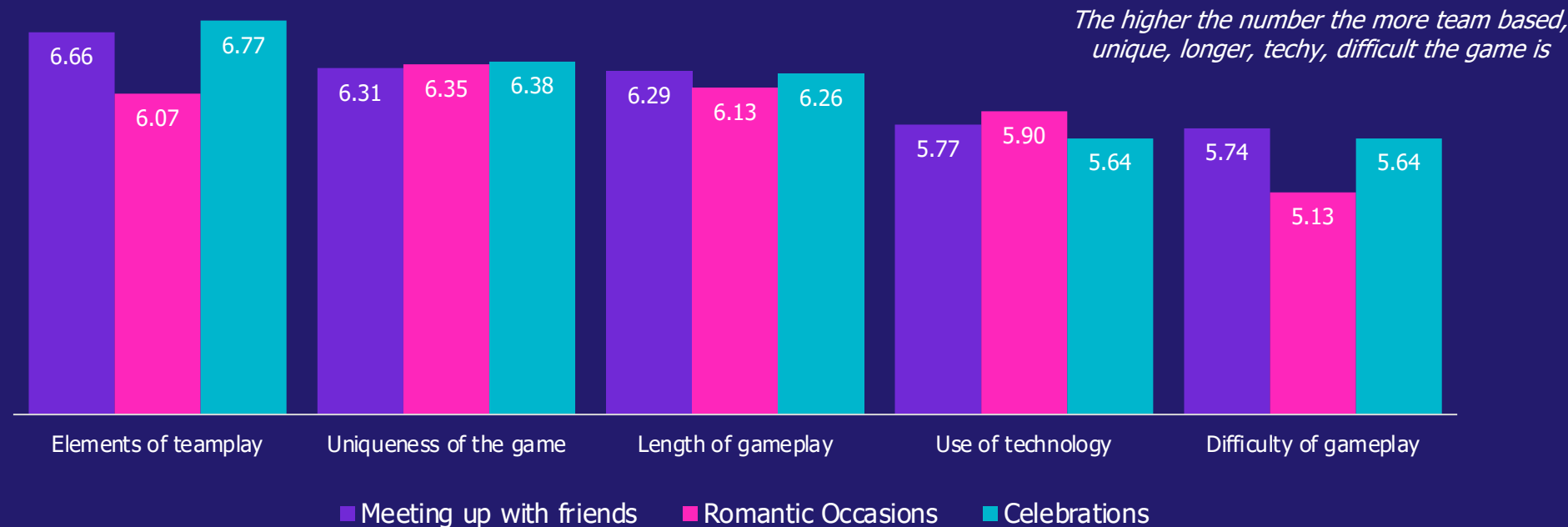
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> Adding in activities other than bowling such as nostalgic video games, fairground games like basketball, boxing, whack a mole etc has been brilliant. In some case we have managed to get ROI in as little as 12 weeks. It provided small incremental spends from those already in venue and immediate hits to the bottom line."

Graham Cook
CEO, All Star Lanes

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Choosing venue by 'occasion'

When it comes to specifics of the game / activity, there are no huge differences between what people want when visiting for different occasions. When it comes to technology, it is not something that is people are overly bothered by (72% voting 3 to 7 out of 10), therefore tech should ideally be used to flex the the other elements such as length or teamplay. **Not just tech for tech sake!**

The higher the number the more team based, unique, longer, techy, difficult the game is

	Meeting up with friends	Romantic Occasions	Celebrations
Elements of teamplay	6.66	6.07	6.77
Uniqueness of the game	6.31	6.35	6.38
Length of gameplay	6.29	6.13	6.26
Use of technology	5.77	5.90	5.64
Difficulty of gameplay	5.74	5.13	5.64

■ Meeting up with friends   ■ Romantic Occasions   ■ Celebrations

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Q. Thinking about your ideal competitive socialising venue for [occasion], what would you want in regard to the [element of gameplay]?

Source: KAM - Competitive Socialising Report 2024

Key take-outs
Focus on games / activity

○ The classic concepts are still the most popular games however this differs considerably by demographic. If implementing new games or adding to a traditional hospitality venue, understanding the objective of that game by demographic is important.

○ Virtual games have seen the sharpest increases in popularity over the previous year. Last year it was the most frequent visitors who over indexed in these, indicating it has moved further into the mainstream.

○ People like variation. When they visit the venues the venues, they like options and flexibility, particularly for Gen Z.

○ What people want from games doesn't vary a huge amount by occasion, however, people are more indifferent when it comes to level of tech, indicating tech should be used to alter the level of teamplay, length and add variation to the game.
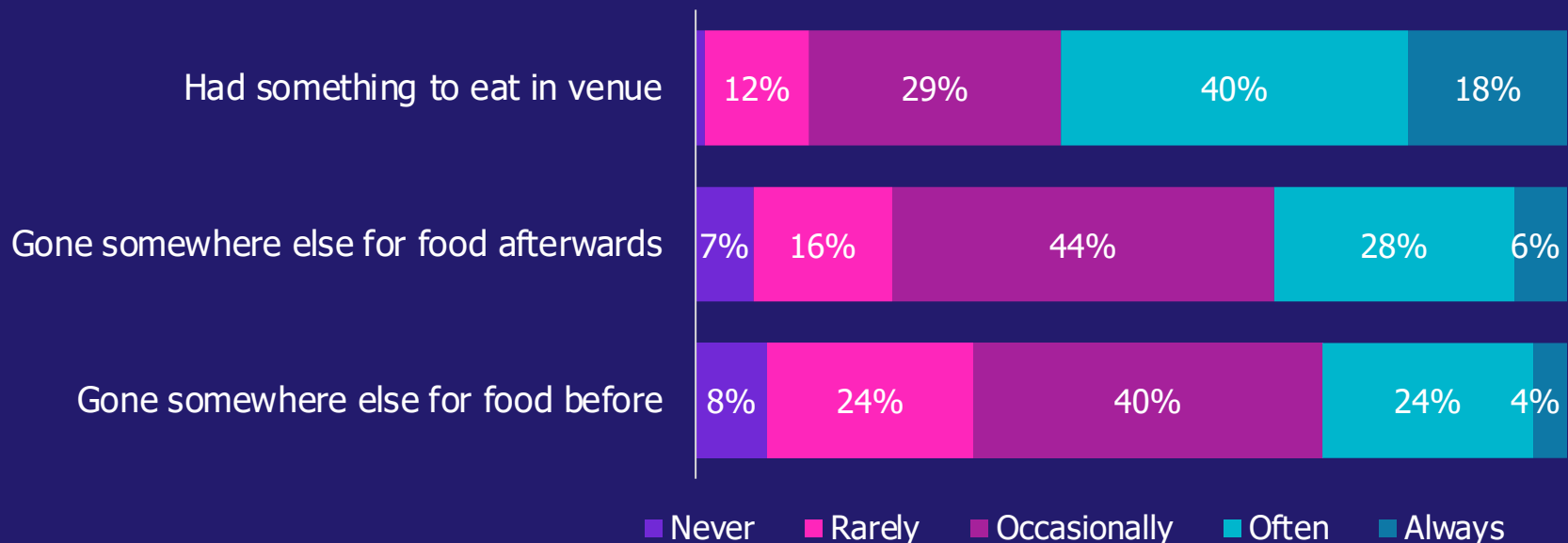
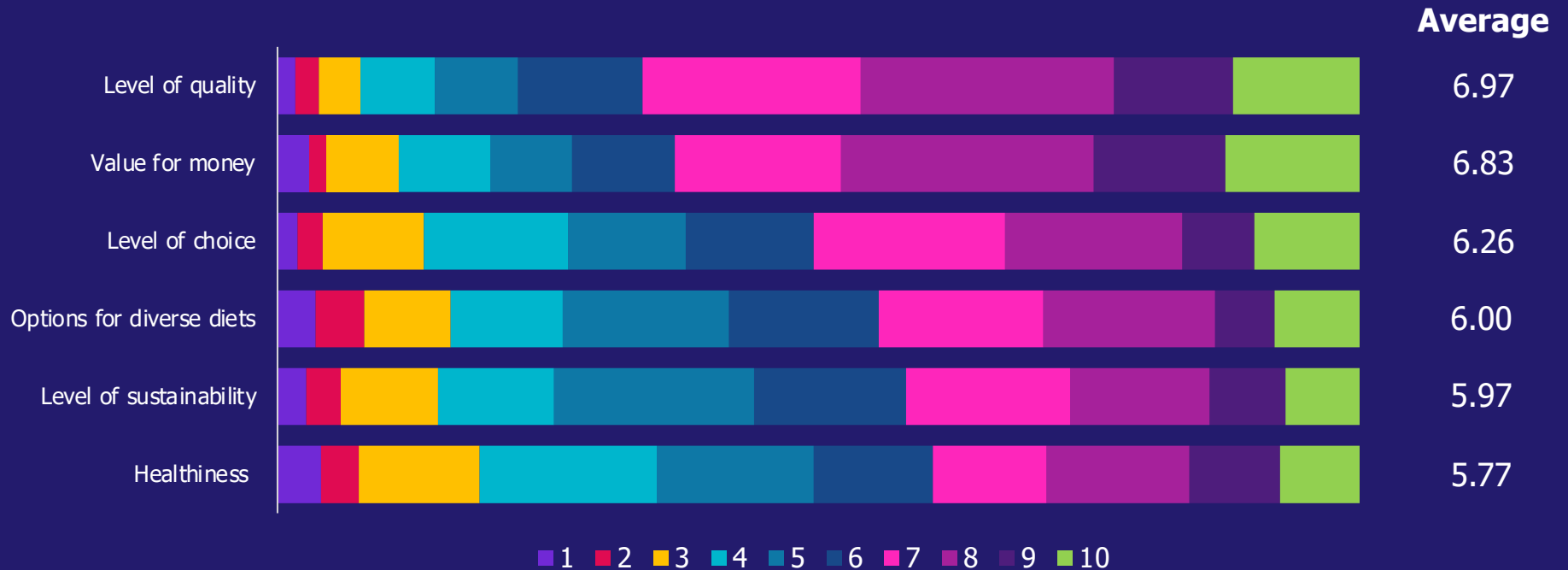**KAM**
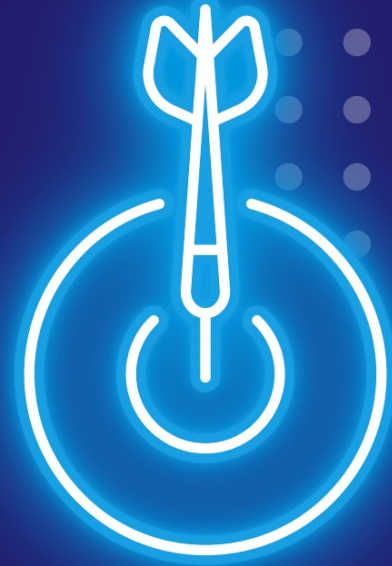
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Focus on food & drink

Eating during, before or after Comp Soc visits

58% of visits 'often' or 'always' involve eating something in the venue. However, many are also going somewhere before or after they visit the venue, suggesting they may be snacking and not having a full meal. Of the regular comp soc visitors (<once a month), 39% 'often' or 'always' eat some somewhere else before, highlighting the opportunity to grow spend per guest.

	Never	Rarely	Occasionally	Often	Always
Had something to eat in venue		12%	29%	40%	18%
Gone somewhere else for food afterwards	7%	16%	44%	28%	6%
Gone somewhere else for food before	8%	24%	40%	24%	4%

Legend: Never · Rarely · Occasionally · Often · Always

Q. When you have gone to a competitive socialising venue in the past, how often have you done the following?

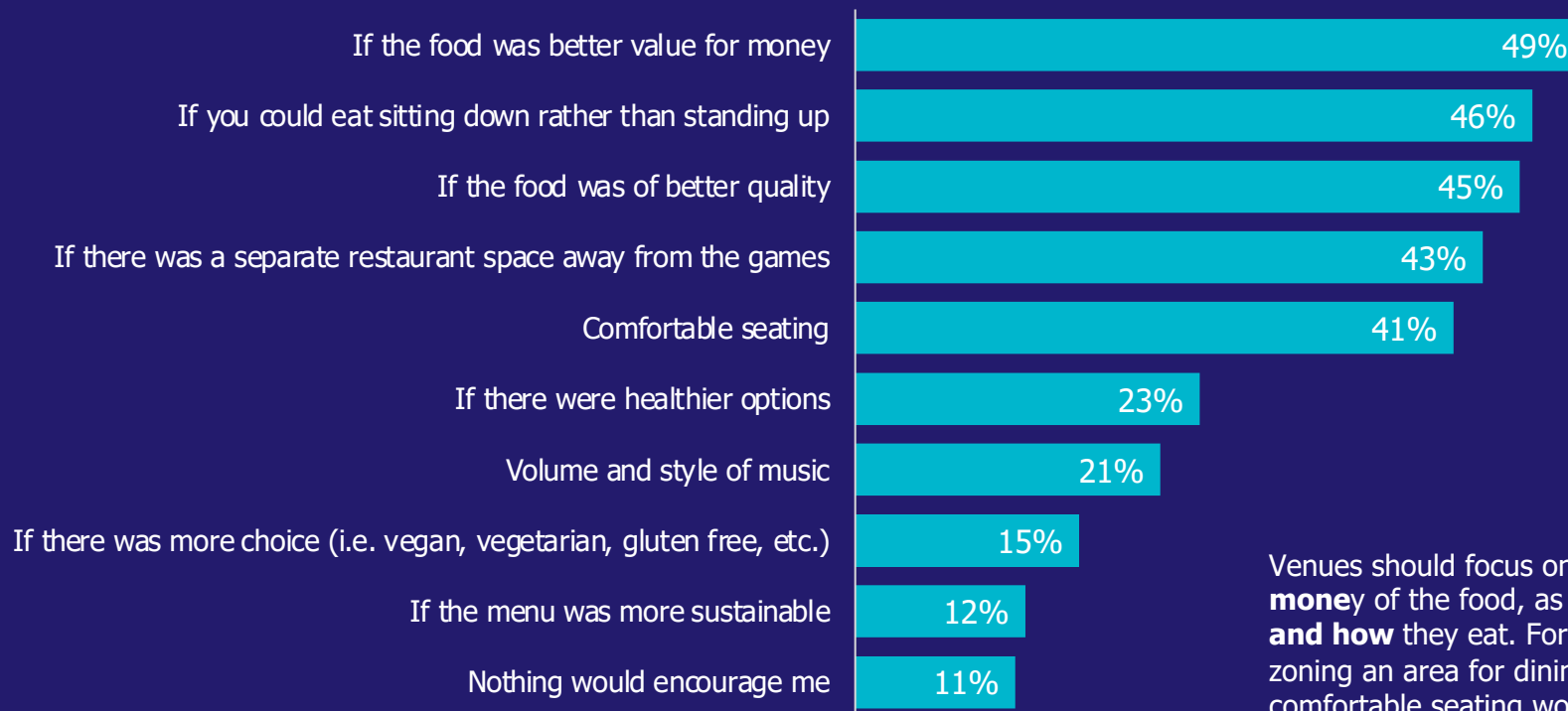Source: KAM - Competitive Socialising Report 2024

Expectations for 'food' in a Comp Soc venue

Expectations across all aspects of the food in Competitive Socialising venues is low and therefore has room to grow. However, the expectation of value for money and quality is above that of health and sustainability, indicating there is even more room to deliver on these aspects.
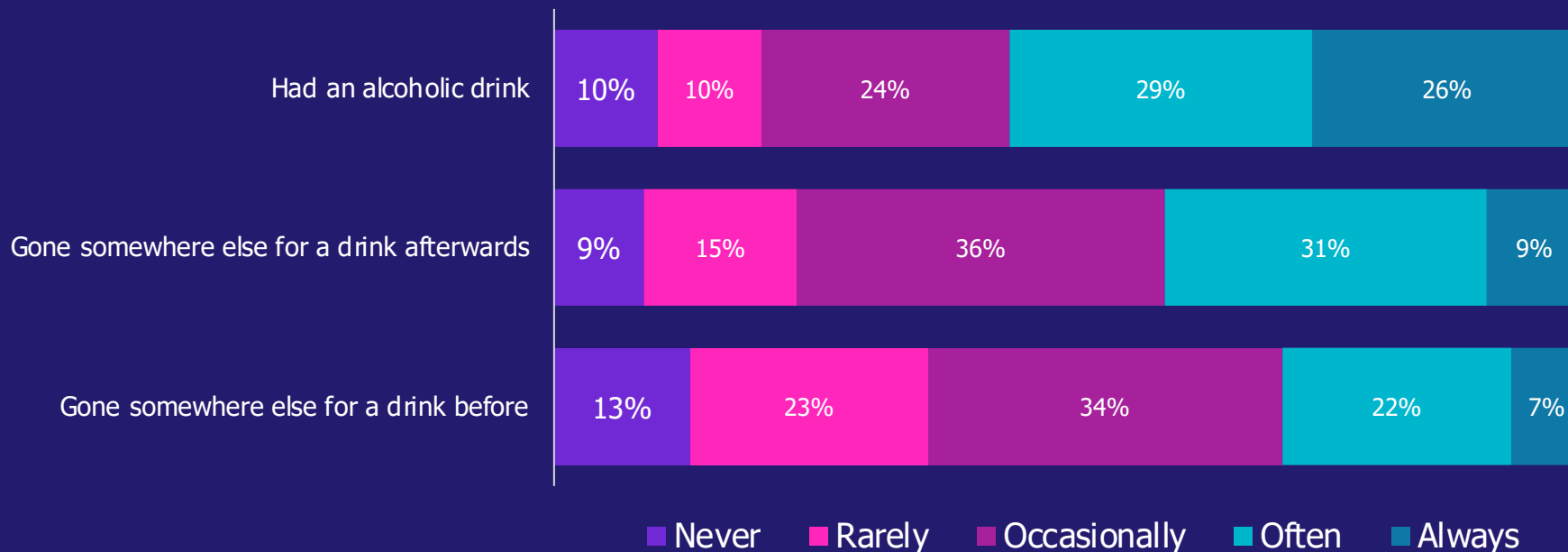
Average

Category	Average
Level of quality	6.97
Value for money	6.83
Level of choice	6.26
Options for diverse diets	6.00
Level of sustainability	5.97
Healthiness	5.77

Legend: ■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10

Q. In your opinion, what would you expect the food to be like in a competitive socialising venue? (1 being poor, not at all, limited etc and 10 being brilliant, very, or expansive)

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Encouraging visitors to stay and eat

Category	Percentage
If the food was better value for money	49%
If you could eat sitting down rather than standing up	46%
If the food was of better quality	45%
If there was a separate restaurant space away from the games	43%
Comfortable seating	41%
If there were healthier options	23%
Volume and style of music	21%
If there was more choice (i.e. vegan, vegetarian, gluten free, etc.)	15%
If the menu was more sustainable	12%
Nothing would encourage me	11%

Venues should focus on the **value for money** of the food, as well as **where and how** they eat. For example, zoning an area for dining with comfortable seating would be effective.

KAM

Q. Which of the following, if any, would encourage you to have something to eat the next time you visit a competitive socialising venue?

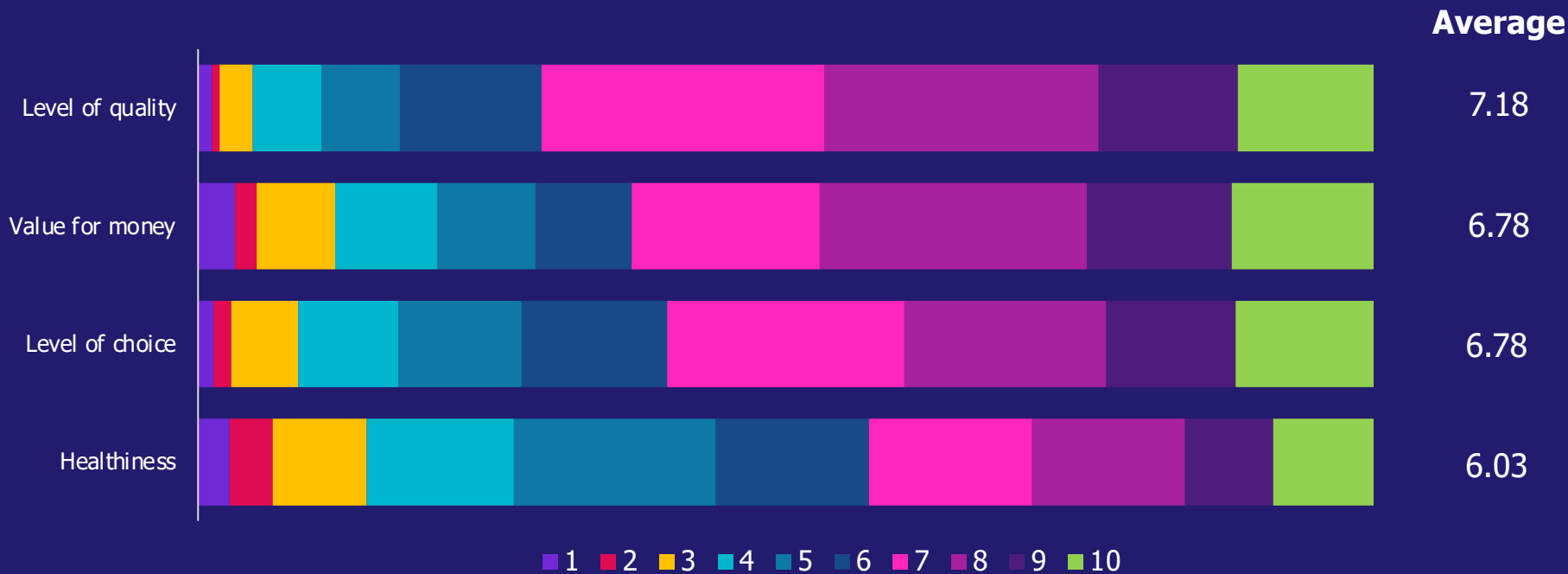Source: KAM - Competitive Socialising Report 2024

Drinking during, before or after Comp Soc visits

2 in 5 visitors to competitive socialising venues either 'often' or 'always' go for a drink somewhere afterwards. Encouraging these visitors to stay could drastically increase the spend per head.
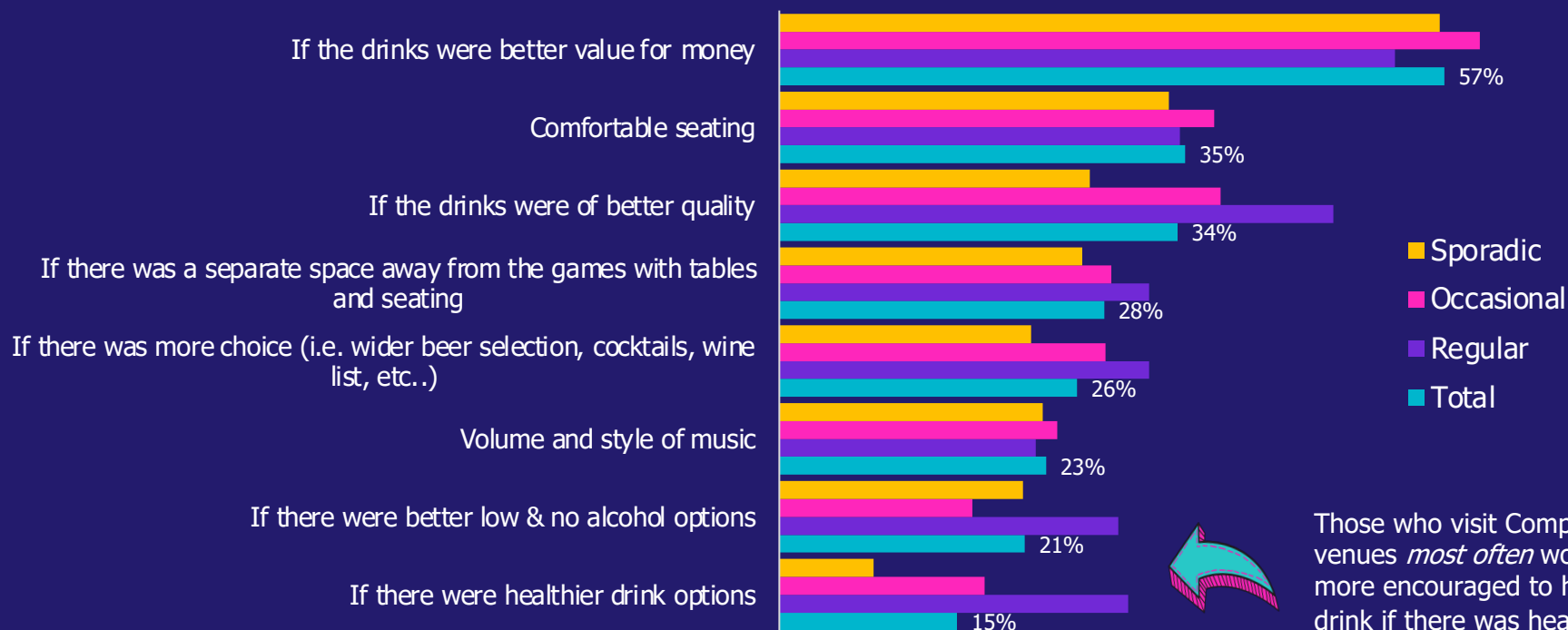
	Never	Rarely	Occasionally	Often	Always
Had an alcoholic drink	10%	10%	24%	29%	26%
Gone somewhere else for a drink afterwards	9%	15%	36%	31%	9%
Gone somewhere else for a drink before	13%	23%	34%	22%	7%

■ Never ■ Rarely ■ Occasionally ■ Often ■ Always

KAM

Q. When you have gone to a competitive socialising venue in the past, how often have you done the following?

Expectation for 'drinks' available in Comp Soc venues

Similarly with the food, many comp soc goers do not expect healthy options. Given the younger demographic of visitors to the sector and the known shift away from alcohol to low and no or functional drinks, this is an area venues can achieve a quick win, particularly given 18–25-year-olds were even less expectant of venues to have healthy options (5.75).

Average

Category	Average
Level of quality	7.18
Value for money	6.78
Level of choice	6.78
Healthiness	6.03

Legend: ■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10

Q. In your opinion, what would you expect the food to be like in a competitive socialising venue? (1 being poor, not at all, limited etc and 10 being brilliant, very, or expansive)

KAM

Encouraging visitors to stay and have a drink

To get competitive socialisers to stay and have a drink, similarly to food, value for money, comfortable seating and quality are the important. However, for those who visit more often, healthier, low and no options are comparatively very important, suggesting this is currently a barrier to getting regulars to come even more and spend more!

If the drinks were better value for money — **57%**

Comfortable seating — **35%**

If the drinks were of better quality — **34%**

If there was a separate space away from the games with tables and seating — **28%**

If there was more choice (i.e. wider beer selection, cocktails, wine list, etc..) — **26%**

Volume and style of music — **23%**

If there were better low & no alcohol options — **21%**

If there were healthier drink options — **15%**

Legend:
- Sporadic
- Occasional
- Regular
- Total

Those who visit Comp Soc venues *most often* would be more encouraged to have a drink if there was healthier or low and no options.

KAM

Q. Which of the following, if any, would encourage you to have a drink the next time you visit a competitive socialising venue? (select all that apply)

Source: KAM - Competitive Socialising Report 2024

Key take-outs
Focus on food and drink

o 58% of visits 'often' or 'always' involve eating something in the venue, so food plays a key role in overall experience.

o The expectation of the food is low, with the highest areas of expectation on the quality only scoring 6.97/10. Conversely, visitors don't expect the food served to be healthy or sustainable, presenting an opportunity to venues to re-position their offer.

o Along with 'value for money' and 'quality', a 'comfortable, designated space' to eat would go a long way to encouraging people to stay and eat.

o 'Healthiness' of drinks also has low expectations from visitors, something that along with a good 'low and no' offer would be an effective lever to keep regulars there for longer.

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Competitive socialising activities in wider hospitality
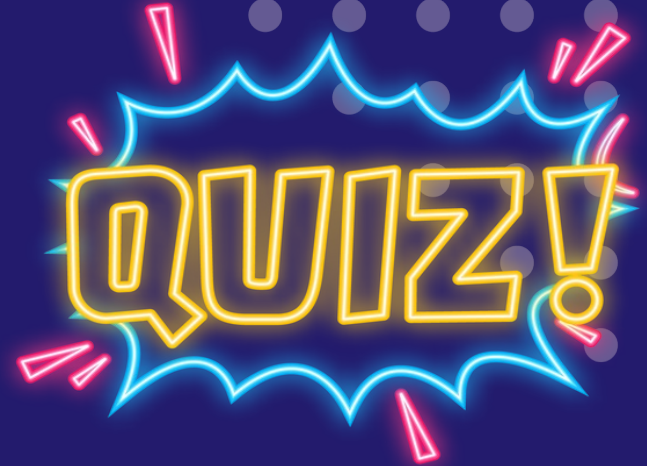
Traditional venues with games/activities

Have you been to a traditional pub or bar that offers competitive socialising games/activities?
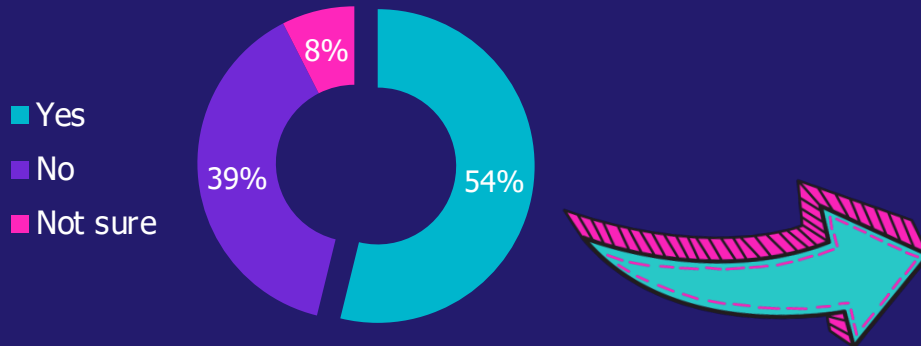
- Yes
- No
- Not sure

8%

39%

54%

3 in 4 people who had been to a traditional venue with an element of competitive socialising said it was positive to their experience, showcasing the opportunity for pubs and bars to adapt and flex their space.

How positive was the activity to the experience?

			54.2%	
		24.5%		20.7%
0.3%	0.3%			
Very negative	Negative	Neutral	Positive	Very positive

Q. In the last 12 months, have you been to a traditional pub or bar that offers an element of competitive socialising such as darts, shuffleboard, pool etc?
Q. How positive was the addition of the activity to your overall experience?

Source: KAM - Competitive Socialising Report 2024
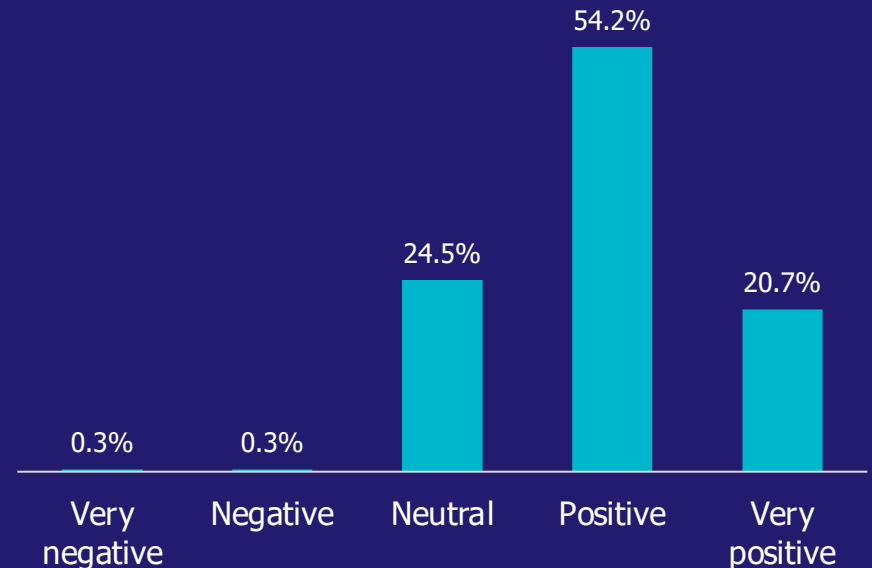
53%...

...said they would like to see more traditional pubs and bars offer elements of competitive socialising (31% said not sure and 16% said no).

It is important to understand your visitors and the surrounding area. For example, for 18-25-year-olds (77%) and 26-35-year-olds (74%) they are much more likely to want to see pub and bars offer elements of competitive socialising, whereas this is drops to 25% of those over 66-years-old.

This figure is up slightly on last year from 50%, indicating people are becoming more open to traditional venues including it.

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Key take-outs
Activities in wider Hospitality

o **3 in 4** people who had been to a traditional venue with an element of competitive socialising said it was positive to their experience, showcasing the opportunity for pubs and bars to adapt and flex their space.

o Over half of competitive socialiser would like to see traditional venues offer more element of competitive socialising, but this differs hugely by age. If you are a venue with a older customer base this may not be the best approach as only 25% of those 66+ would like to see this.

KAM
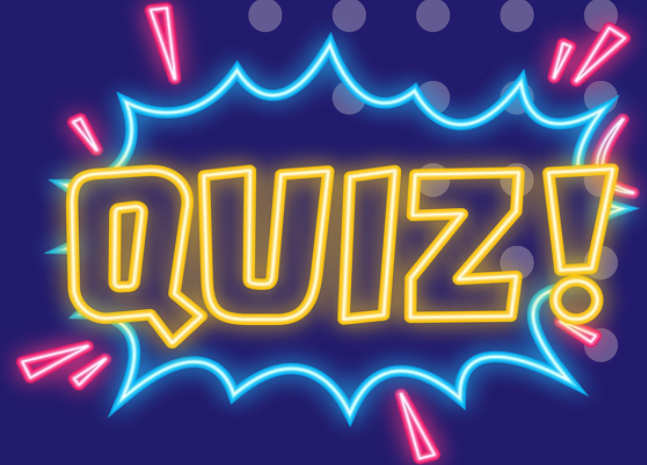
KAM

Discovering & researching new venues

Discovering new venues

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

Word of mouth (friend or family)
64%

Social media
42%

Someone else books as part of a celebration
31%

Someone else books as part of a work social
19%

Walking by on the street
18%

Print media e.g. magazine
12%

My child recommended it/requested
10%

3rd party e.g. design my night etc
6%

■ 2023
■ 2024
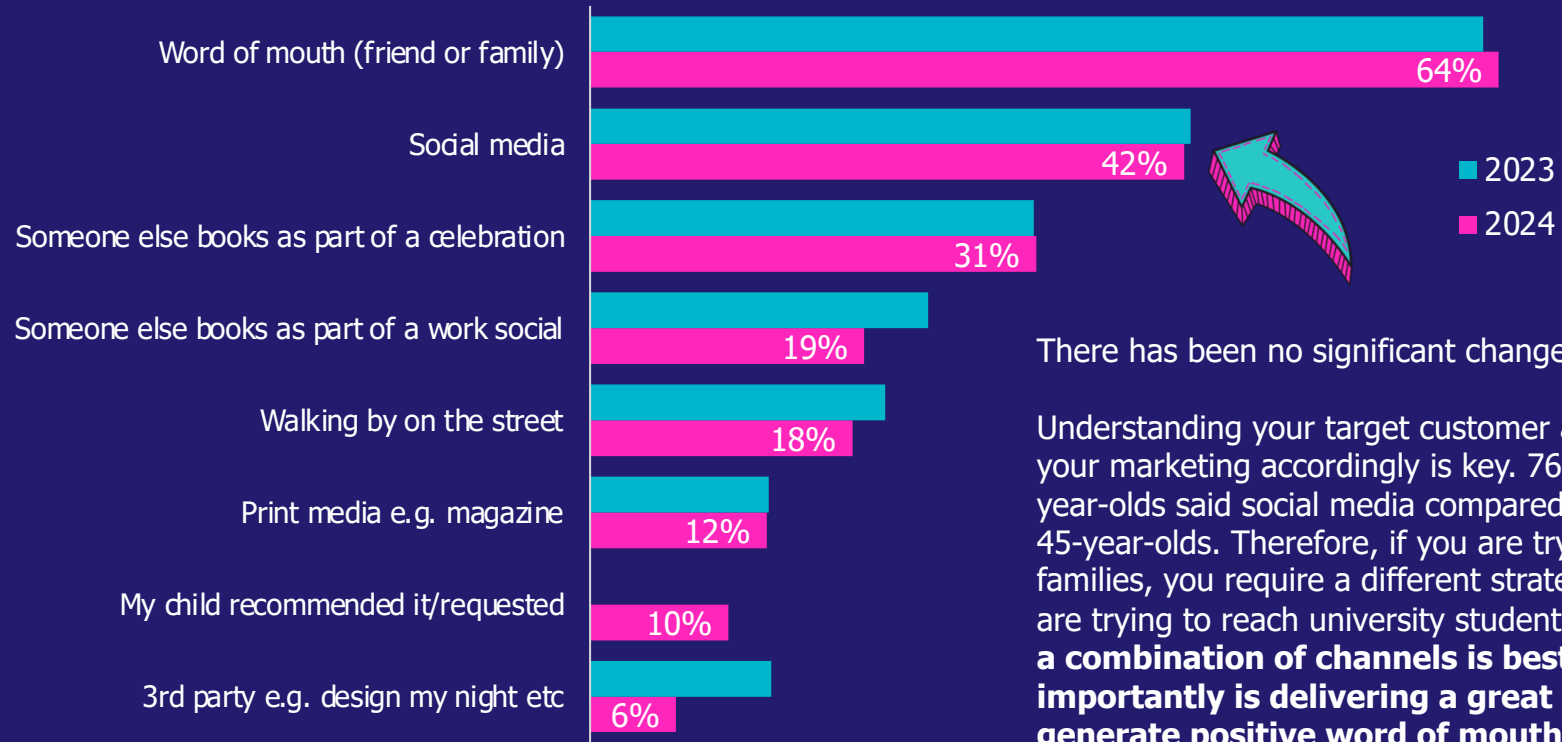
There has been no significant change YoY.

Understanding your target customer and adapting your marketing accordingly is key. 76% of 18-25-year-olds said social media compared to 43% of 36-45-year-olds. Therefore, if you are trying to reach families, you require a different strategy than if you are trying to reach university students. **Ultimately, a combination of channels is best, but most importantly is delivering a great experience to generate positive word of mouth!**

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Method of research

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

Method	Percentage
General internet search	30%
Asking for recommendations from friends/family	28%
Website	26%
Facebook	24%
Instagram	21%
Google's 'Near Me' search tool	18%
TikTok	14%
Twitter / X	10%
Other social media	8%
Booking websites/apps (e.g., Design my night)	8%
Voice controlled smart speakers (e.g., Amazon Alexa,…	6%
Reviews in magazines/newspapers	5%
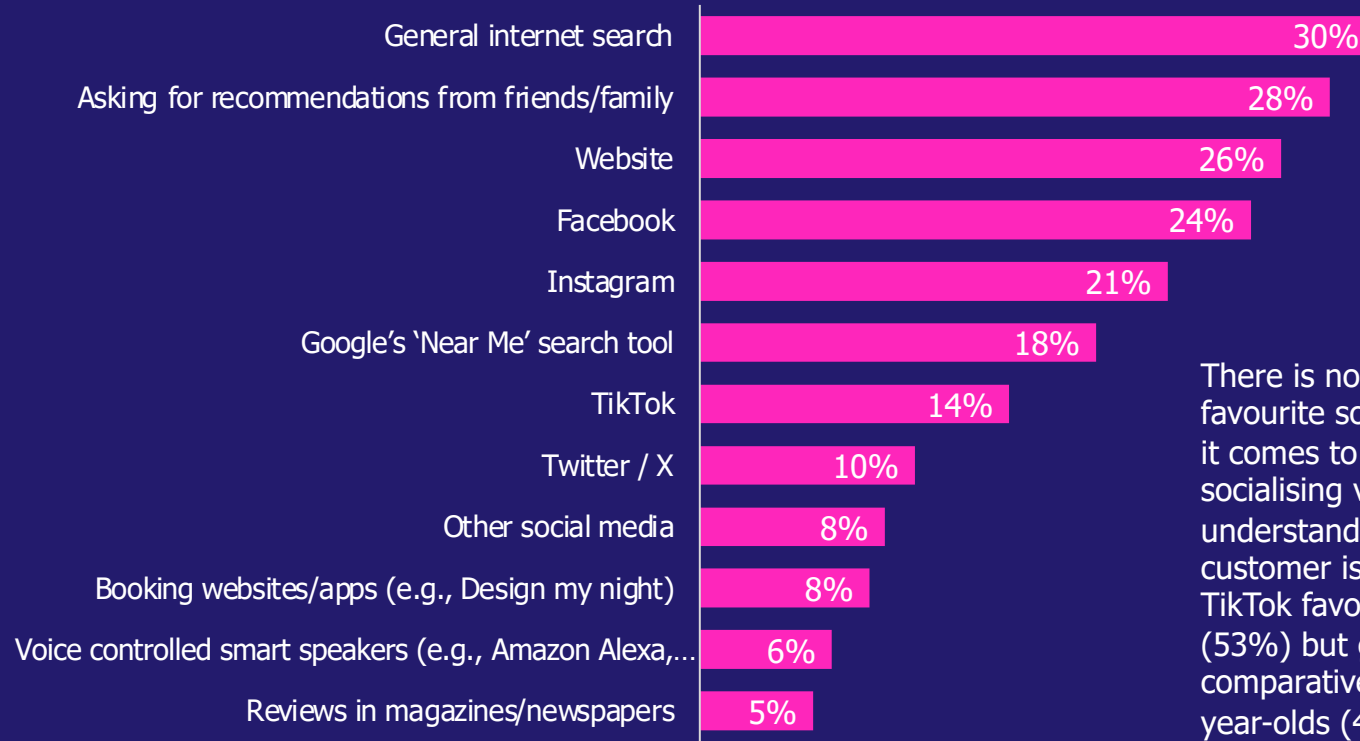
There is not one overwhelming favourite source of information when it comes to researching competitive socialising venues. Once again understanding the venues target customer is crucial at first, with TikTok favourable to 18–25-year-olds (53%) but general internet search comparatively important to 36-45-year-olds (48%)

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Current in-venue experience
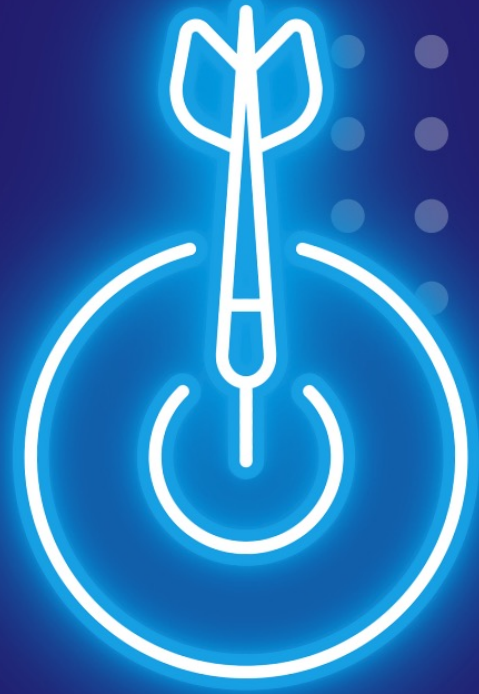
30%...

...said that in the past, a competitive socialising venue has NOT delivered on value for money, rising to 44% for those who visits at least once a month.

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Biggest frustrations with Competitive Socialising venues...

Q. Below are some reasons that people get frustrated/annoyed with the games at competitive socialising venues, which of these statements, if any, do you agree with?

The biggest pain points for comp soc visitors is focused on game length or time left waiting around as opposed to difficulty. To ensure value for money this is the area venue should focus on.

Statement	Percentage
It's annoying when there's too much waiting around in between turns	48%
It's annoying when the games are over too quickly	36%
It's annoying when the games take too long to finish	26%
It's annoying when the game is too hard	25%
None of the above	21%
It's annoying when the game is too easy	18%
It's annoying when there isn't an overall winner at the end	13%

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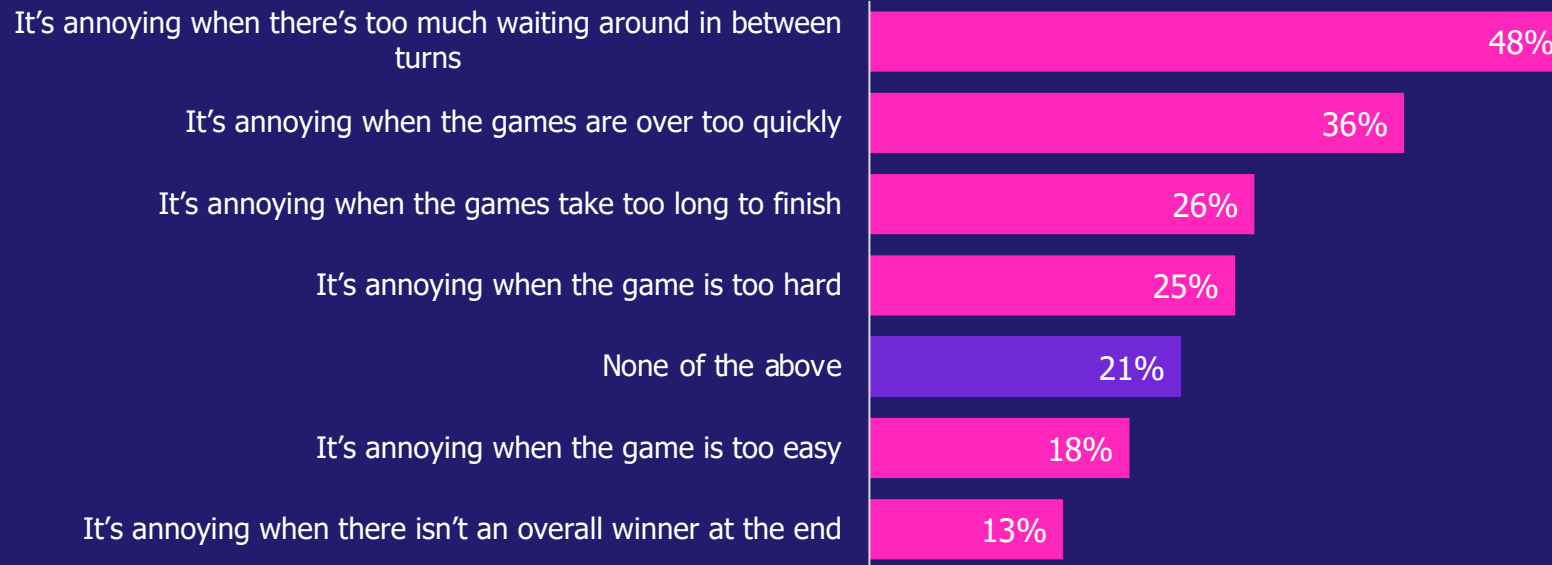
Frustrations *outside* of the games...

Once again, when it comes to the venue as a whole and the operations, it is the synergy between the activity and food that can cause frustration. Ensuring it is easy to order, comfortable to eat and choice is the key to a positive experience.

Statement	%
The food options are limited	33%
There isn't a good area to eat and relax when not playing	31%
It's difficult to order a drink while playing	27%
Ordering drinks/food while playing stops the flow of the activity	25%
I wouldn't stay at the venue unless I was playing/doing a game/activity	25%
It's the sort of place you visit once but not again	22%
None of the above	21%
There isn't enough variety in the games	15%

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One thing customers would add or change this year

1. Better Facilities and Amenities:
  i. A separate area for relaxation or socializing away from gaming areas, comfortable seating areas, improved accessibility for disabled individuals for better dining experiences.
  ii. Requests for more spacious venues, quieter areas for conversation, and areas specifically designated for eating and drinking are also common.

2. Variety and Quality:
  i. A wider variety of games and activities available, including options suitable for different age groups and interests.
  ii. Improvements in the quality and variety of food and drink offerings are desired, including more affordable options, heathier options and consideration for dietary preferences such as vegan or gluten-free

3. Affordability and Value:
  i. Concerns about pricing, with requests for lower prices, better value for money, and discounts for group bookings or loyalty programs.
  ii. Package deals or promotions on food and drinks, particularly during off-peak times.

4. Atmosphere and Experience:
  i. Requests for quieter environments, less crowded spaces, and options for more relaxed or family-friendly experiences.
  ii. Improvements in customer service, such as staff taking drink orders or better organization, are also mentioned.

5. Innovation and Differentiation:
  i. Innovation such as including the introduction of new, unique experiences, incorporating technology for ordering or gameplay, and diversifying activities to appeal to a wider audience.

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Key take-outs

Key take-outs

o **State of the sector –** it has matured and visit frequency stabilised. Cost-of-living is the main barrier to visiting more so understanding how it stacks up vs wider hospitality is key.

o **Entertainment spend at risk –** with many visits to CS involving visits elsewhere, entertainment spend is most at-risk vs food and drink spend.

o **'Hero' occasions** – celebrations, events and romantic occasions are the occasions that the sector over indexes in.

o **Capturing the casual occasions –** CS falls down the pecking order of venues for the 'meeting up with friends' occasion. Features around the game such as the type, length, number of players is important for this.

o **Growth in virtual** – of the specific type of activity, although not the most popular, games with element of a virtual reality have seen the biggest growth. Using tech to help classic concepts evolve and innovate is a great way to bridge the gap.

o **Game time** - When it comes to games, reducing the wait time and increasing the total game will remove the main sources of frustration.

o **Food / drink reputation –** the expectation of food is low, even on quality. Visitors don't expect healthy options, similarly to the low and no offer, something that would encourage regular visitors.

o **Understand your customer** – how people discover / research venues, what games they want, drinks offer or what they want from traditional hospitality differ drastically depending on age. It needs to match the overall strategy!

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Closing statement

"Pulling this report together, as well as being an avid visitor to the competitive socialising sector has certainly put some data points behind some of the thoughts and experiences I have had over the past year. As more and more venues and activities enter the sector, as well as the introduction of activities in to regular pubs and bars, the sector is maturing and is therefore presented with new challenges. Visit frequency is down, the number of people visiting more or less has stabilised as the expectations of people change and the desire for continually new experiences. Partner this with the strain on spend within the hospitality sector, be that on food, drink or entertainment, it would suggest the future years for competitive socialising could become more challenging.

'Hero' occasions Celebrations, events and work parties are occasions that competitive socialising venues can continue to attract, but if the sector is to increase frequency again and build loyalty, the casual occasions can not be ignored. I see one of the big wins coming through ensuring the game length, type and player numbers can be adapted where possible. Often achieved through technology this will stand venues in good stead making them suitable for multiple occasions and ideally reducing the repetitiveness of the games.

Food remains an important growth opportunity, but the sector faces challenges as a whole with reputation and expectation of the current food offer. Although many venues have made great strides in this, if potential visitors don't expect it because of the reputation in the sector, then these changes will be to little benefit. When it comes to eating drinking, ensuring the environment is good to do so is key to encouraging the more casual meet up friends, as well as offering a well rounded drinks range that keeps the regulars coming back.

Ultimately every venue, including pubs and bars, is different and has their own unique challenges and opportunities. Taking time to understand your customer, the surrounding area and the overall objective is the key to making any changes to the venue or customer proposition."

Laurence Brown, Senior Insight manager, KAM

For more information on any of the insight or data in this report, including case studies or ideas as to how we can support your business objectives, please contact me by email on **laurence@kaminsight.com**

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