KAM

THE COMPETITIVE SOCIALISING CUSTOMER

Customer trends for
activity-led venues.

2025

The power of play.

Something special is happening across the UK's social scene and it's being fuelled by more than pints and playlists. Our latest research with a nationally representative sample of 500 UK adults (18+), conducted in May 2025, discovers the consumer trends that are driving this new era of competitive socialising, where connection, play and purpose collide to create something truly unforgettable.

This isn't just a trend, it's a movement. Nearly 1 in 3 UK adults have visited a competitive socialising venue in the past year, and among those who go, 41% are now returning at least once a month, up from 35% last year. Even more striking? Over a third say they're visiting more often than they were 12 months ago.

This is a sector on the rise and it's winning hearts, not just footfall. Why? Because it speaks to something deeper. At a time when people are looking to escape stress, strengthen friendships and find joy in the everyday, competitive socialising is stepping in as a new kind of essential. It's where 83% say they make more lasting memories, 76% feel closer to friends, and 80% believe they're more likely to land a second date. Not bad for a night of darts, bowling or crazy golf.

And it's breaking the rules of traditional nights out. 77% of people say they need less alcohol to have a good time in these spaces. 65% believe introverts feel more comfortable socialising, and 82% say these venues are more inclusivethan standard bars and pubs. This is about reimagining what going out looks like—and who gets to enjoy it.

For younger generations especially, competitive socialising is fast becoming the go-to. It brings energy, escapism and emotional payoff—and all with a bat, a ball, or a buzzer in hand.

So what's next? For operators, investors, and innovators: the message is clear. This is your chance to design for connection, not just consumption. It's time to elevate your experience, tap into the emotional drivers, and create spaces that leave people buzzing—long after the game is over.

Blake Gladman, Strategy & Insight Director, KAM

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The future of going out is competitive, collaborative and, above all, unforgettable. Are you ready to play?

Competitive socialising continues its winning streak.

The popularity of competitive socialising venues with the UK customer remains strong, whilst visit frequency is increasing.

29% Of the UK adult population said they've visited a competitive socialising venue in the last 12 months
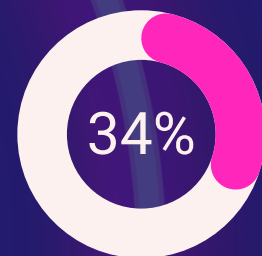
Competitive socialising venues continue to grow in popularity across the UK, with a significant portion of the adult population engaging in this emerging hospitality trend. 29% of UK adults reported visiting a competitive socialising venue, such as those offering games, activities, or experiences alongside food and drink, in the past 12 months. This indicates a broad and sustained appeal, with interest reaching nearly a third of the adult market.

More notably, visit frequency is on the rise. This uptick reflects a growing appetite for social experiences that go beyond the traditional pub or restaurant setting. Consumers are not only trying these venues but incorporating them into their regular social routines. The increase in repeat visits suggests these venues are successfully delivering on customer expectations, combining entertainment with quality hospitality.

Overall, competitive socialising is not just a passing trend, it's becoming a key part of the UK leisure landscape. For operators, this presents an opportunity to innovate, diversify offerings, and tap into a growing segment that values shared experiences, novelty, and fun.
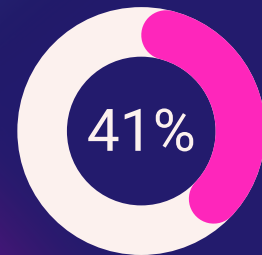
**41%** Of customers visit a competitive socialising venue at least once a month vs 35% in 2023

34% Of competitive socialising visitors are visiting more often than they were last year

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# Appeal continues to grow outside of dedicated venues.

The competitive spirit is strong among consumers of all ages, leading traditional venues like pubs and bars to incorporate competitive gaming alongside dedicated socialising venues.
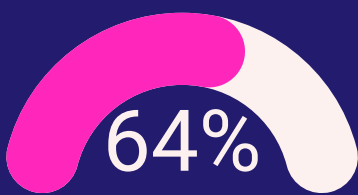
64% Of the UK adult population have been to a traditional pub that offers an element of competitive socialising
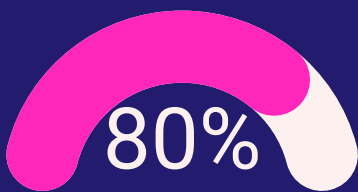
80% ...say it was a positive addition to their overall experience
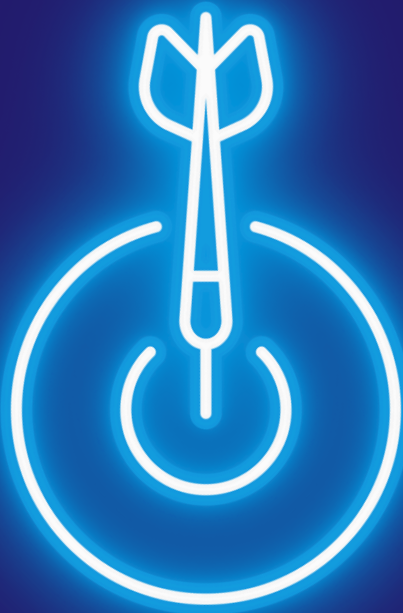
The trend of competitive socialising is expanding beyond dedicated venues into traditional pubs, with nearly two-thirds of people experiencing pubs that offer activities like darts and arcade games. About 80% of these patrons view it positively, enhancing their overall pub experience.

There's a growing demand for more pubs to adopt these features, with 53% of respondents in favor. Younger demographics, particularly those aged 18-35, show the most enthusiasm (77% and 74% respectively), while interest declines in those over 66 (25%).

This indicates a need for pub operators to understand their audience and adapt accordingly, presenting an opportunity to innovate and future-proof venues.

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The most loved games according to competitive socialising customers

'Classic' gaming concepts continue to enchant customers, serving as a nostalgic gateway for older generations through their familiar charm, while remaining inviting to the younger crowd. Establishments that weave unique twists into these timeless gaming ideas, enriched by enhanced gamification and the infusion of technological marvels, are those poised to elevate these classic games into the vibrant realm of contemporary entertainment.
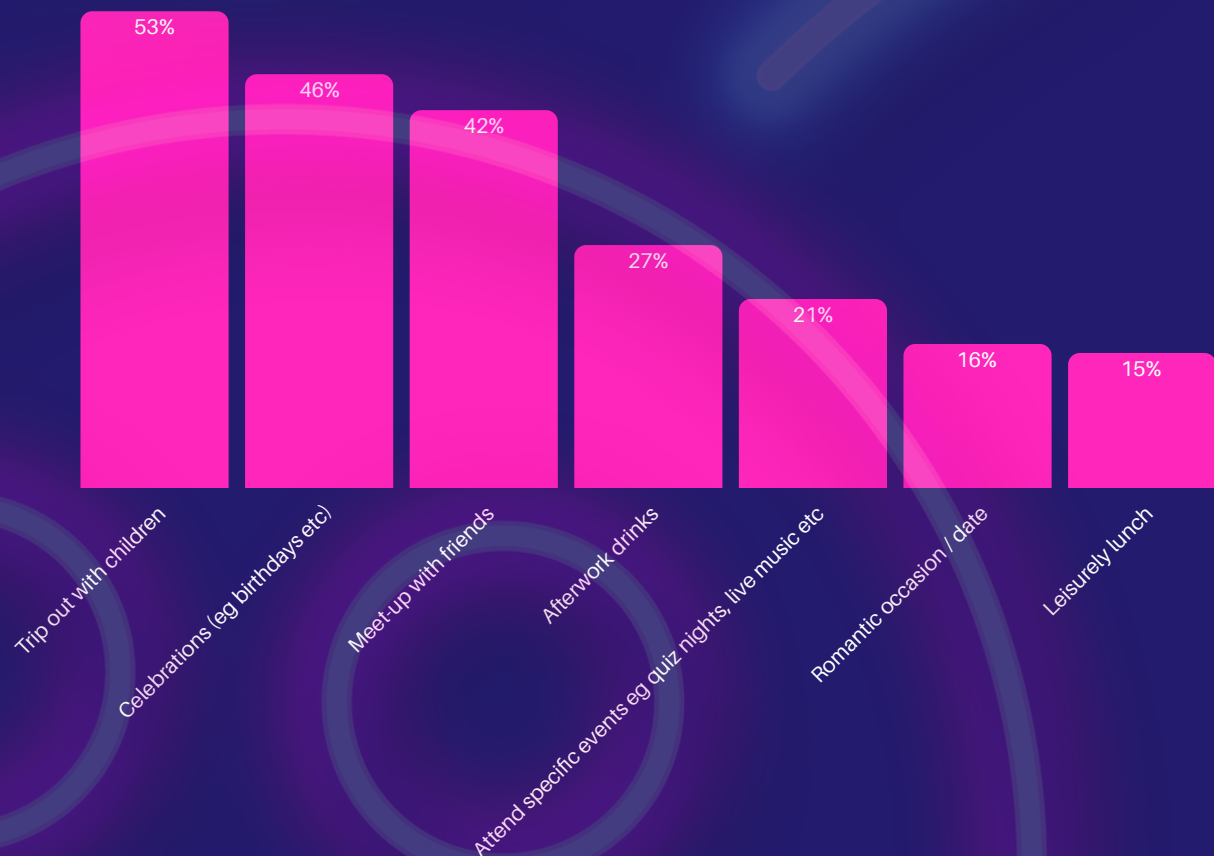
Everything remains relatively stable compared to last year, save for the remarkable resurgence in the allure of arcades.

1 Arcades

2 Ten Pin Bowling

3 Crazy / Adventure Golf

4 Bingo

5 Football

6 Pool

7 Darts

8 Board Games

9 Escape Rooms

10 Go Karting

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The competitive occasions.

The most valuable customers to the competitive socialsing sector currently are families (£1,410 per annum). Families are worth over £400 MORE per annum to the sector than groups of friend/co-workers (£986 per annum), with 'date nights' the second highest spend (£1,153 per annum).

For what occasions do people visit a dedicated competitive socialising venue <u>vs a regular venue?</u>

Occasion	Percentage
Trip out with children	53%
Celebrations (eg birthdays etc)	46%
Meet-up with friends	42%
Afterwork drinks	27%
Attend specific events eg quiz nights, live music etc	21%
Romantic occasion / date	16%
Leisurely lunch	15%

Competitive socialising venues are popular for various occasions, combining entertainment and hospitality to engage both kids and adults. They are ideal for celebrations, casual meet-ups, and afterwork gatherings, offering interactive experiences beyond traditional bars and restaurants. The blend of good food, drinks, and playful activities makes these venues appealing for planned events or spontaneous outings, establishing a strong niche in leisure activities.

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Barriers continue to hold customers back.

While competitive socialising venues are on the rise, a number of barriers still limit how often people visit. Unsurprisingly, the biggest hurdle is cost. Nearly half of consumers say that the general expense of going out is a major deterrent. Highlighting the pressure on discretionary spending in a tighter economic climate.

Accessibility also plays a role. For many, the issue isn't interest, it's proximity. A significant number say they don't have a conveniently located venue nearby, and even when they do, it can be difficult to coordinate a group of friends who all enjoy the games on offer.

Another point of friction is spontaneity. Having to book ahead puts off a quarter of potential customers who prefer to keep plans flexible. For some, the premium price point of experiential venues compared to standard pubs or bars adds to the hesitation.

The takeaway? While competitive socialising continues to grow in popularity, operators must be mindful of these practical barriers. Addressing them, whether through local expansion, more flexible booking options, or clearer value propositions, will be key to converting occasional visitors into regular ones.

| Barrier	%
The cost of going out in general	48%
Location (there isn't one that is conveniently near to me)	28%
Finding enough other people who also like playing the games	27%
Having to always book in advance (i.e., unlikely to have space if you just turn up)	25%
The cost of visiting experiential leisure venues compared to standard pubs and bars	22%

# When money or time are tight what gets cut first?

In a cost-conscious climate, consumers are having to make tough choices about their leisure time and competitive socialising is holding its ground. When asked where they'd scale back if money were tight, people were equally likely to cut back on food or entertainment, while slightly more said they'd reduce their spend on drinks. This suggests that experiential activities are seen as valuable enough to compete directly with more traditional hospitality staples.

Time too is a factor. If forced to trim down a night out that includes a restaurant, a pub/bar, and a competitive socialising venue, most would cut the pub or bar. Interestingly, experiential venues are the least likely to be dropped. It would appear that for a growing number of people, competitive socialising isn't just a novelty - it's becoming the part of the night they most want to keep.

If money was tight and you had to reduce your spend
in one of the below, which would it be?

Going out for food	Going out for drinks	Going out for entertainment
32%	36%	32%
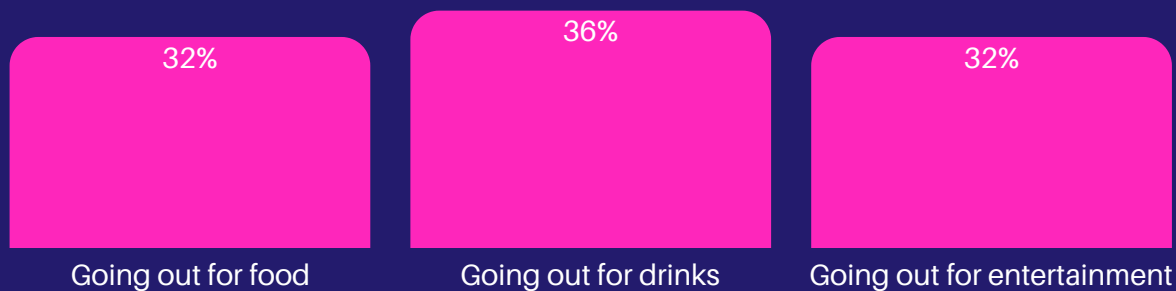
If you were planning a night out with friends and you had a restaurant, a bar/pub and an experiential leisure venue lined up BUT you had to cancel one of them due to a lack of time, which one would you remove from your night out?

Restaurant	Bar/pub	Experiential leisure venue
32%	39%	28%
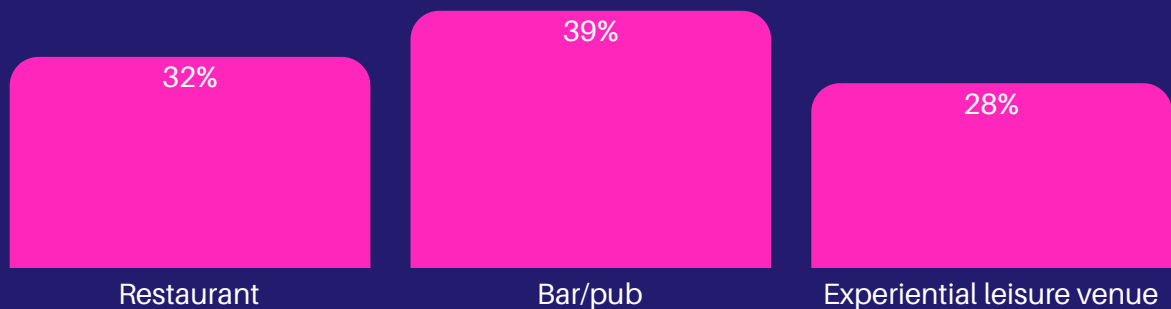
The feel-good factor. Competitive socialising can lift the nations mood.

Which of the following psychological benefits do you gain from going out and socialising with friends, in general?

Benefit	Percentage
Improved mood	66%
Increased enjoyment / buzz	51%
Reduced stress	46%
Increased sense of belonging	35%
Reduced loneliness	33%
Mentally stimulated	27%
Emotionally stimulated	25%
Physically stimulated	20%

Which, if any, of these do you feel are impacted GREATER when visiting an experiential leisure venue compared to a regular pub or bar?

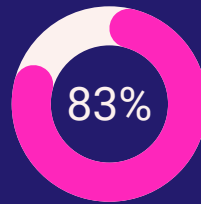| Benefit	Percentage
Improved mood	39%
Increased enjoyment / buzz	27%
Reduced stress	20%
Increased sense of belonging	14%
Mentally stimulated	14%
Reduced loneliness	12%
Emotionally stimulated	10%
Physically stimulated	10%

For many, going out with friends isn't just about having a good time - it's a vital wellbeing boost. Two-thirds of people say socialising improves their mood, while nearly half credit it with lowering stress. Others highlight deeper emotional gains: reduced loneliness, a sense of belonging, and the all-important ability to switch off from everyday life.

The data shows that the immersive, interactive nature of experiential venues intensifies the psychological pay-off for many. Over a quarter of people say these venues give them a greater "buzz" and enjoyment, while nearly four in ten feel their mood is lifted more than it would be in a standard pub environment.

While not everyone sees a dramatic shift in emotional impact, the sense of mental stimulation, escapism, and connection is consistently higher in competitive socialising settings. This underscores their growing appeal, not just as places to play, but as places that actively contribute to emotional wellbeing. In a time where mood and mental health matter more than ever, the power of play is proving to be more than just fun - it's therapeutic.

# Play, connect, repeat. Competitive socialising is making moments that matter.

Cementing friendships and making new connections. It turns out that playing games and sharing new experiences isn't just fun, it's meaningful. A striking majority of people say they make stronger memories at experiential leisure venues than they do at regular pubs or bars. Whether it's the laughter over a game of darts or the adrenaline rush of mini golf, 83% of respondents feel these settings create more memorable moments.
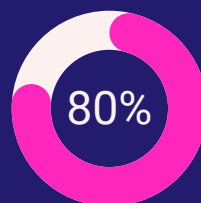
But the magic doesn't stop there. Nearly 8 in 10 say these venues help strengthen friendships, suggesting that doing something together, rather than simply chatting over drinks, deepens bonds. It's no surprise, then, that experiential venues are also winning the dating game. Over three-quarters of people would prefer to take a date to a competitive socialising venue over a standard bar, and 80% believe it would actually increase their chances of scoring a second date.

83% Of the UK adults think you make more memories when visiting an experiential leisure venue compared to a regular pub or bar
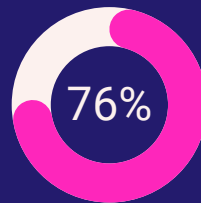
76% Think their friendships strengthen more when visiting an experiential leisure venue compared to a regular pub or bar
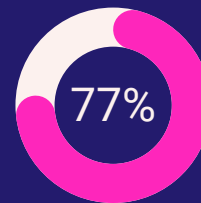
77% Of those adults currently dating, would you prefer to take a date to an experiential leisure venue compared to a regular pub or bar

80% Of those adults currently dating, think they'd be more likely to get a second date if they went to an experiential leisure venue compared to a regular pub or bar on their first date

In a world where connection matters more than ever, these spaces are proving they're not just about the activity, they're about the emotional experience. Whether you're nurturing a lifelong friendship or sparking a new romance, competitive socialising seems to be the backdrop where the best stories begin.

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Creating an inclusive experience. Redefining socialising.
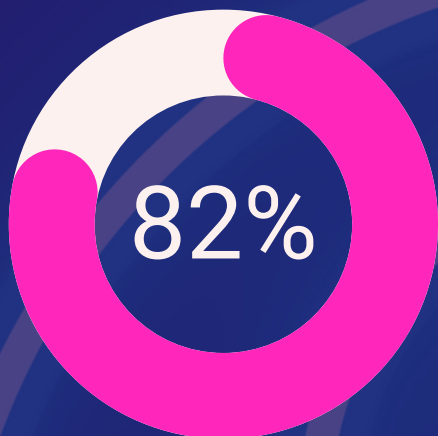
82% Think experiential leisure venues are more inclusive (i.e. appeal to and welcome a broader variety of people) compared to a regular pub or bar
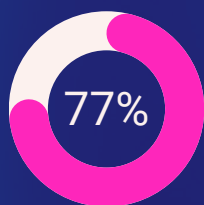
77% Of the UK adults think that you are less likely to need alcohol to have a good time when visiting an experiential leisure venue compared to a regular pub or bar
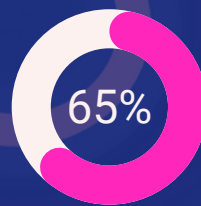
65% Think that introverts are more likely to enjoy going out and socialising with other people when visiting an experiential leisure venue compared to a regular pub or bar

Experiential leisure venues are doing more than redefining nights out - they're helping to reshape social norms. For many, they offer a refreshing shift from the traditional pub or bar scene. In fact, 77% of people say they feel less reliant on alcohol to have a good time when visiting these venues. The focus shifts from what's in your glass to what you're doing and who you're doing it with.

It's not just moderators who are taking notice. These activity-driven spaces also appear to be a welcome antidote for introverts, with 65% of people believing that those who are typically more reserved are more likely to enjoy socialising at an experiential venue. By removing the pressure of conversation and adding the ease of shared play, these venues help level the social playing field.

Perhaps most telling is the overwhelming belief that these venues are simply more inclusive. A striking 82% of people say experiential venues appeal to and welcome a broader mix of people than traditional pubs or bars. Whether it's their lighter atmosphere, interactive design, or broader appeal beyond drinking, it's clear that competitive socialising is creating spaces where more people feel like they belong and that's a win for everyone.

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Meet KAM

KAM is a research and insight consultancy committed to helping hospitality and food service businesses make better decisions. We take pride in offering cutting-edge consultancy backed by deep insights.

We work with operators, suppliers, and service providers to uncover what consumers, customers and teams really think — and what to do about it. From improving guest experiences to fine-tuning customer proposition and comms to building stronger teams, we turn data into clear, useful insight. We're proud to be a trusted voice in the hospitality industry, helping shape outstanding experiences everywhere from the front line to the boardroom.

If you're ready to be informed, educated, and inspired, hop on board and let's embark on an exciting journey together.

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