

KAM

THE COMPETITIVE SOCIALISING CUSTOMER

Customer trends for
activity-led venues.

2026



WELCOME TO COMPETITIVE SOCIALISING 2026



Competitive socialising has grown up.

What started as something a bit different to do on a night out is now a proper part of the hospitality mix. People are visiting more often, using these venues for more occasions, and expecting a lot more than just a decent game when they get there.

And that's where it gets interesting.

Because the activity might get you considered, but it doesn't necessarily win the whole occasion. Guests are judging the food, the drinks, the value, the atmosphere, the booking journey and whether there's enough going on to make them want to come back. Half of personal spend in a competitive socialising venue is now on food and drink, yet plenty of that spend is still leaking elsewhere before and after the visit.

There's another challenge too: competitive socialising venues no longer have the playground to themselves. Pubs and bars are adding games, activity-led experiences are becoming more mainstream, and customers can increasingly get their competitive fix without ever stepping inside a dedicated competitive socialising venue.

So the question is no longer simply, "Have we got a great game?" It's "Are we giving people enough reasons to choose us, stay with us and come back?"

That's what this report is really about. Not just what customers are doing, but where the commercial opportunities are hiding - in the game mix, the food, the bar, the booking journey and, crucially, everything happening around the activity itself.

There's plenty here to feel positive about. But there are also a few things I suspect might make operators slightly uncomfortable. Which is usually where the useful stuff starts."

Katie Jenkins
Marketing Director
KAM



WHAT'S ON THE MENU?

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METHODOLOGY

KAM data is based on an online survey of 752 UK adults aged 18+ who have visited a competitive socialising venue. The survey was conducted in September 2026.

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WHY COMPETITIVE SOCIALISING MATTERS

78%

want pubs, bars and restaurants to provide **an experience they can't get at home**

66%

say hospitality venues have a responsibility to **create a memorable experience** for guests

57%

would rather **spend money on experiences** than material goods



GOING OUT NEEDS TO GIVE US MORE

For a good few years we've talked about consumers shifting their spend towards experiences. That shift has now become embedded in the way Brits socialise. We're increasingly spending our leisure time and money on doing something together, with food and drink forming just part of the experience rather than always being the experience itself.

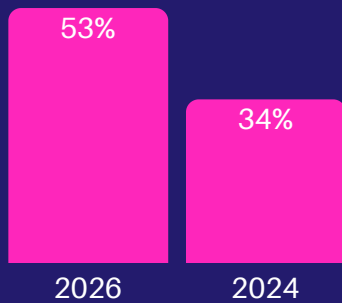
For operators, that means the battleground is no longer simply product, price and service. Increasingly, consumers are looking for something to do, something to share and something worth remembering. That is exactly the space competitive socialising occupies.



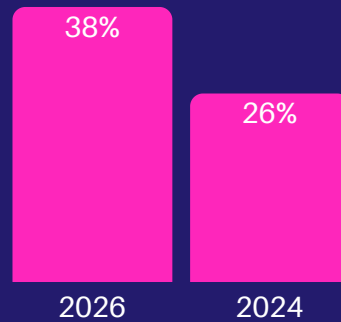
FROM OCCASIONAL TREAT TO REGULAR HABIT

Competitive socialising is becoming a more regular part of the way people go out, with customers increasingly building competitive socialising into their wider repertoire of nights out, celebrations and social occasions.

% who visit at least monthly



% visiting *more often* vs last year

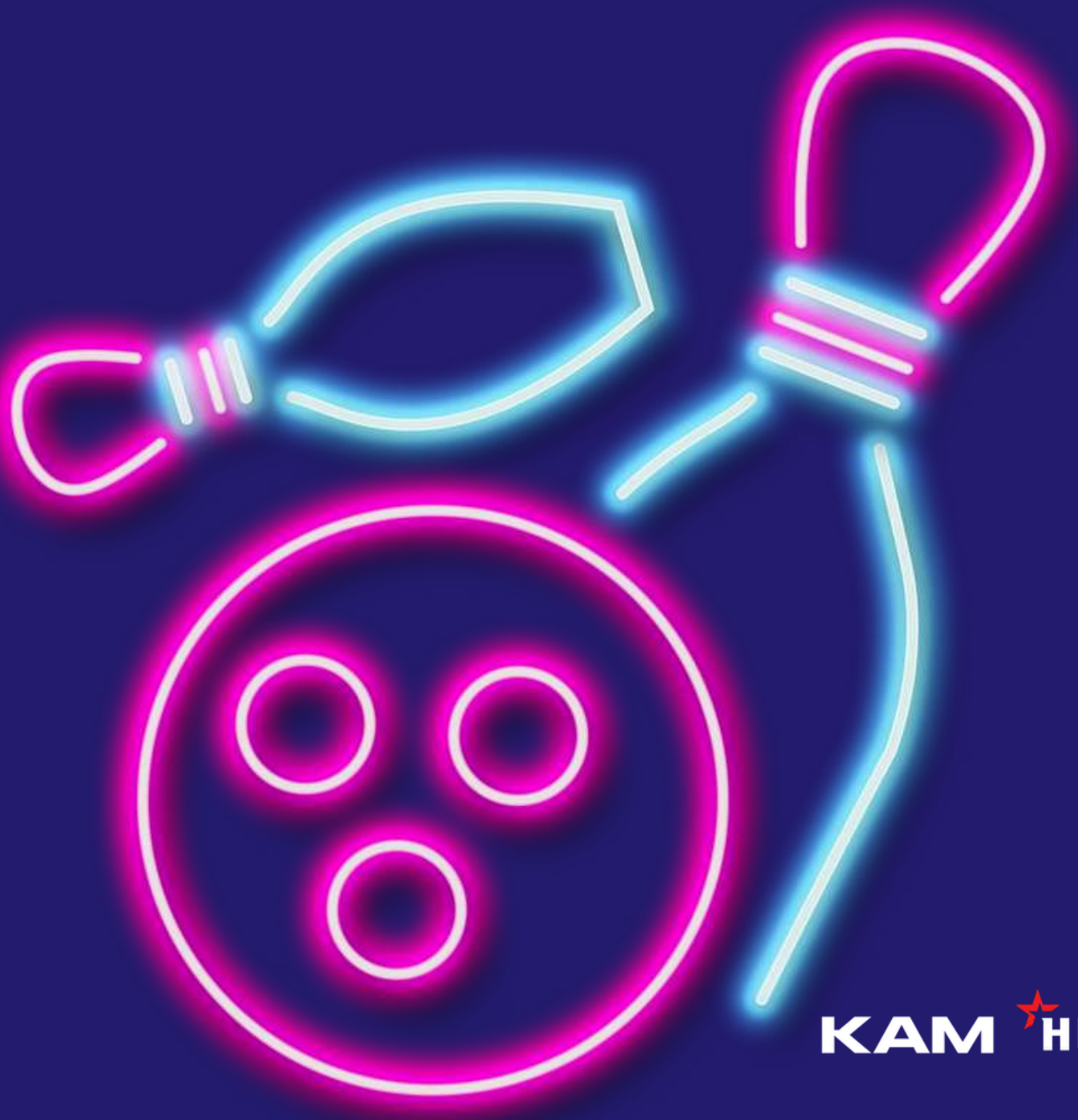


When guests visit more often, variety, freshness and reasons to return matter more. A great first visit is important but sustaining frequency depends on making sure the experience doesn't start to feel repetitive.

**MORE FREQUENT VISITS RAISE
THE BAR FOR FRESHNESS,
VARIETY AND REPEATABILITY.**



SAY HELLO TO THE COMPETITIVE SOCIALISING CUSTOMER



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COMPETITIVE SOCIALISING IS A SOCIAL OCCASION

Competitive socialising is built around being together. Friends are the most common companions, but the occasion stretches well beyond that, from date nights and family outings to after-work socials.

Most visits are relatively small-group occasions. **Two thirds of recent visits were with just two to four people**, with four people the most common group size. That means venues need to work for different group types, not just large parties, from couples and families to friends and colleagues.

Who do guests usually visit with?

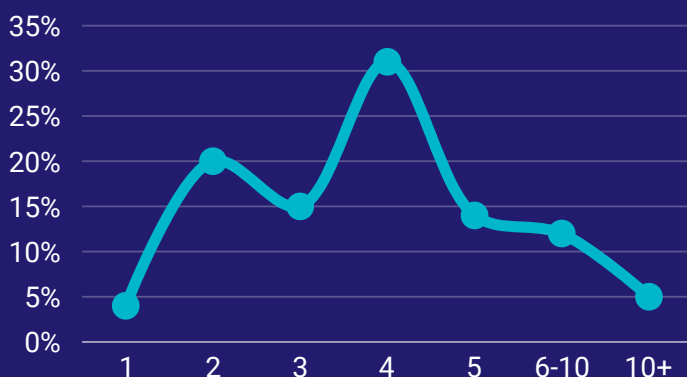
70% with friends

41% with partner/date

26% with children

21% with co-workers

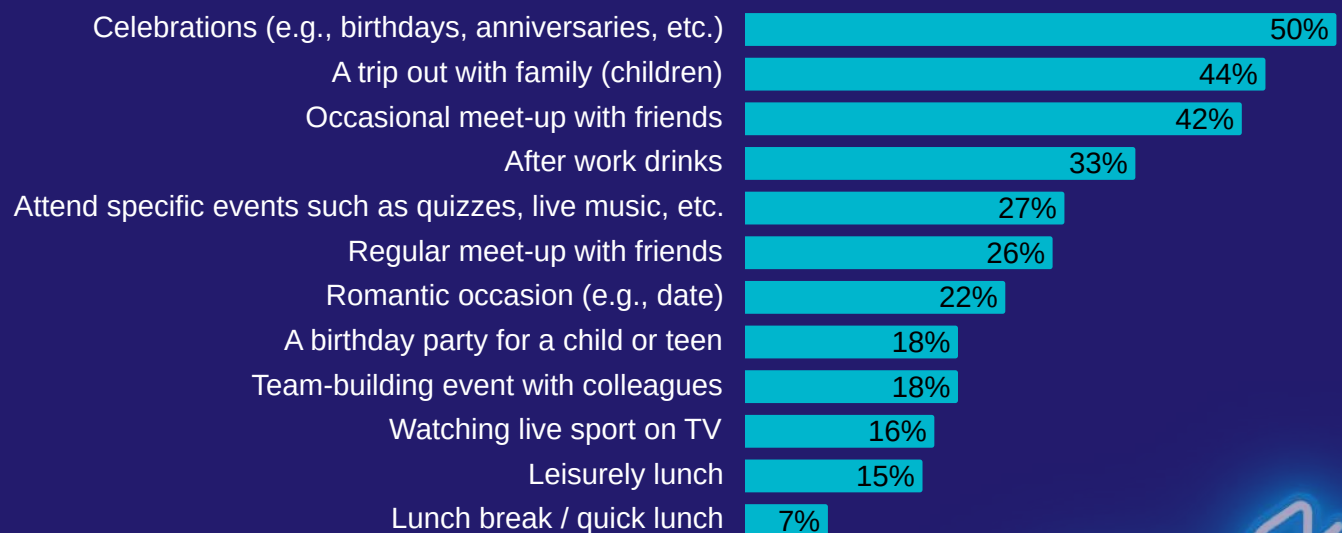
Most recent group size:



MORE REASONS TO PLAY

Competitive socialising is stretching beyond the big night out. Family, friendship, work and celebration are all now meaningful parts of the mix.

Why do people visit a competitive socialising venue?



	2024	2026	
Celebrations:	41% → 50%.	+9pts	
Family outing:	32% → 44%.	+12pts	
After-work drinks:	22% → 33%.	+11pts	
Specific events:	21% → 27%.	+6pts	

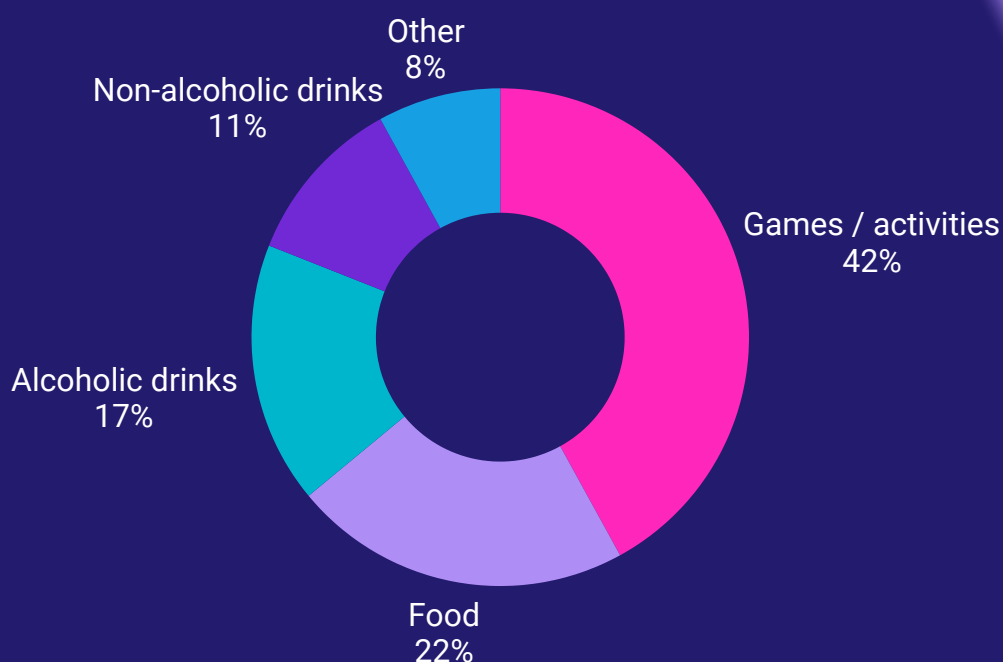


Competitive socialising is attracting a broader range of occasions. Celebrations still lead the way, but family outings, casual catch-ups, after-work drinks and date nights are all firmly part of the mix. And several of those occasions are growing. That gives operators more opportunities to drive frequency but also means the experience needs to flex for very different groups, dayparts and reasons to visit.

THE GAME IS ONLY PART OF THE SPEND

£38 average personal spend per visit

How guests split their spend:



HALF OF SPEND GOES ON FOOD AND DRINK

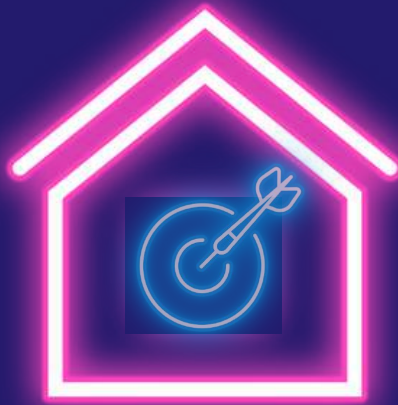
Competitive socialising may be built around the activity, but the commercial opportunity goes well beyond it. Guests spend around £38 per person on a typical visit, and only 42% of that goes on the games themselves. Half of all personal spend is on food and drink, making the wider hospitality offer a major part of the value of each occasion.

COMPETITIVE SOCIALISING VENUES SIT WITHIN A WIDER OCCASION



28%

always/often drink elsewhere **BEFORE** a competitive socialising visit
(30% have food before)



71%

at least sometimes combine a **competitive socialising visit with other hospitality or leisure venues**



39%

always/often drink elsewhere **AFTER** a competitive socialising visit
(38% have food after)

Competitive socialising is often just one stop in a wider day or night out. 71% of guests say their visit is at least sometimes combined with other hospitality or leisure venues. That means the opportunity isn't only to increase spend during the visit. There is already food and drink spend happening around the occasion, particularly afterwards.

THE OPPORTUNITY IS TO WIN MORE OF THE OCCASION

CHOOSING THE VENUE

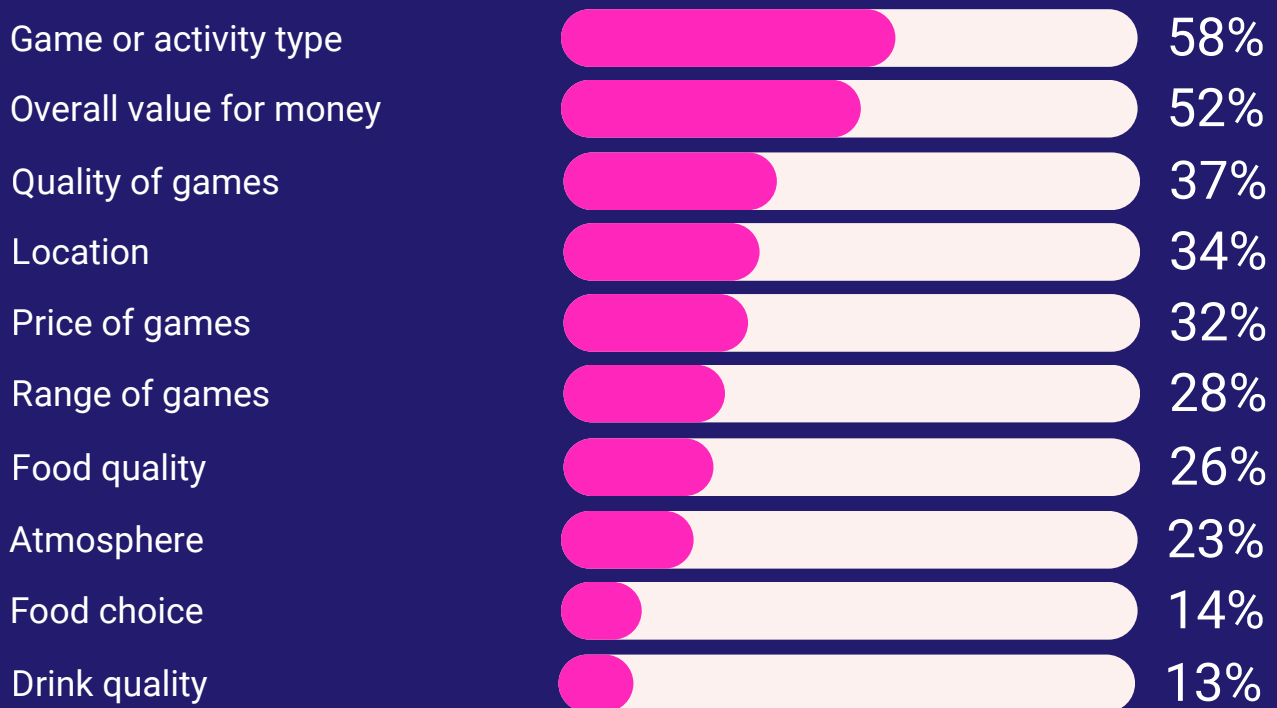
What gets a competitive socialising venue
onto the shortlist



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THE GAME STILL LEADS THE DECISION

What's most important when choosing a competitive socialising venue?



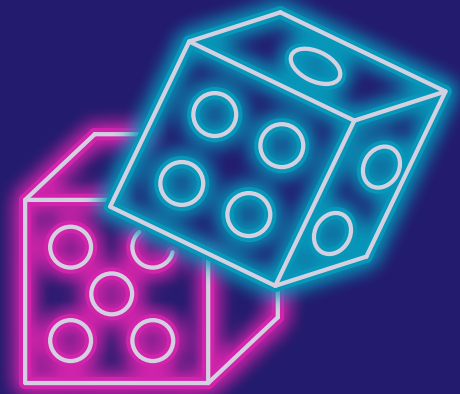
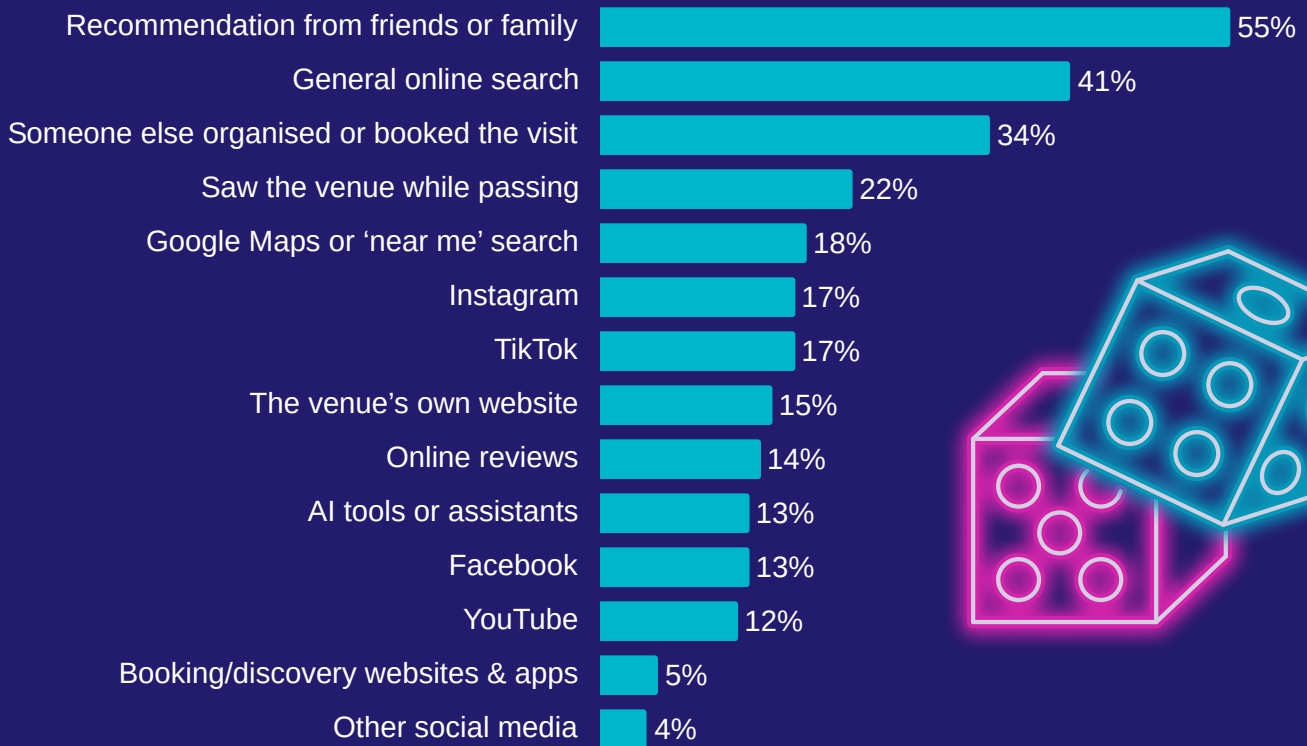
The game gets you considered. Value helps you win.



The activity still leads the decision, but value for money is almost as important. Once the game is good enough to get a venue onto the shortlist, the wider proposition - price, location, food and atmosphere - helps decide where people actually go.

THE JOURNEY STARTS LONG BEFORE BOOKING

How guests discover competitive socialising venues:



13% have used AI tools to help discover or choose a venue

Discovery is spread across search, social, maps, reviews and AI, but 'word of mouth' remains the strongest route in. For operators, visibility matters across multiple channels, but the experience itself still has to be good enough for people to recommend.

MAKE IT EASY TO BOOK



35%

have discovered a venue through social media and gone on to visit or book

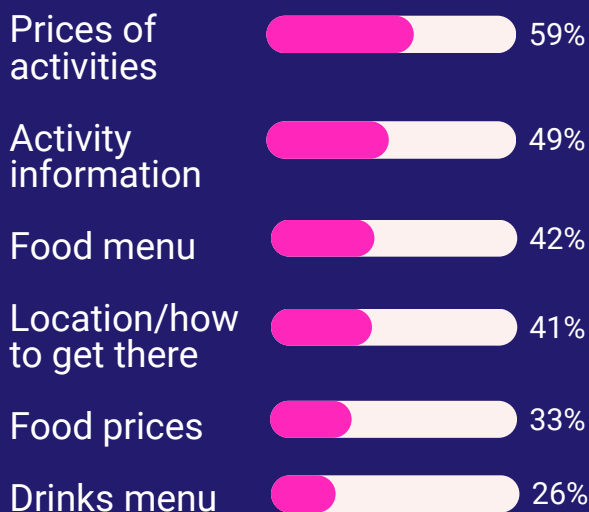
55%

prefer to book directly via the venue website

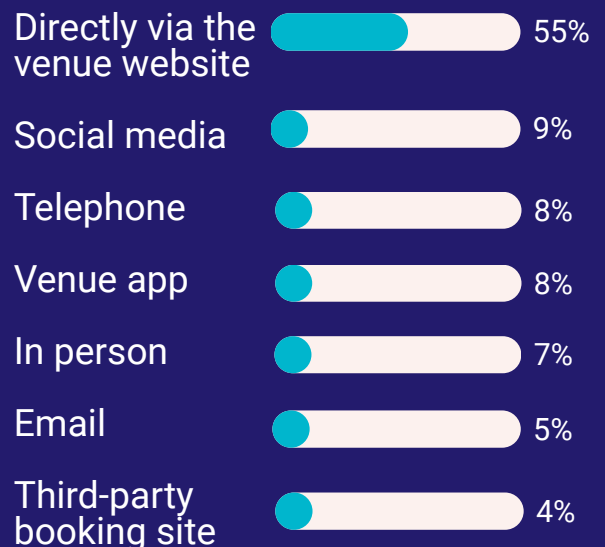


FROM RESEARCH TO RESERVATION

What information are guests looking for?

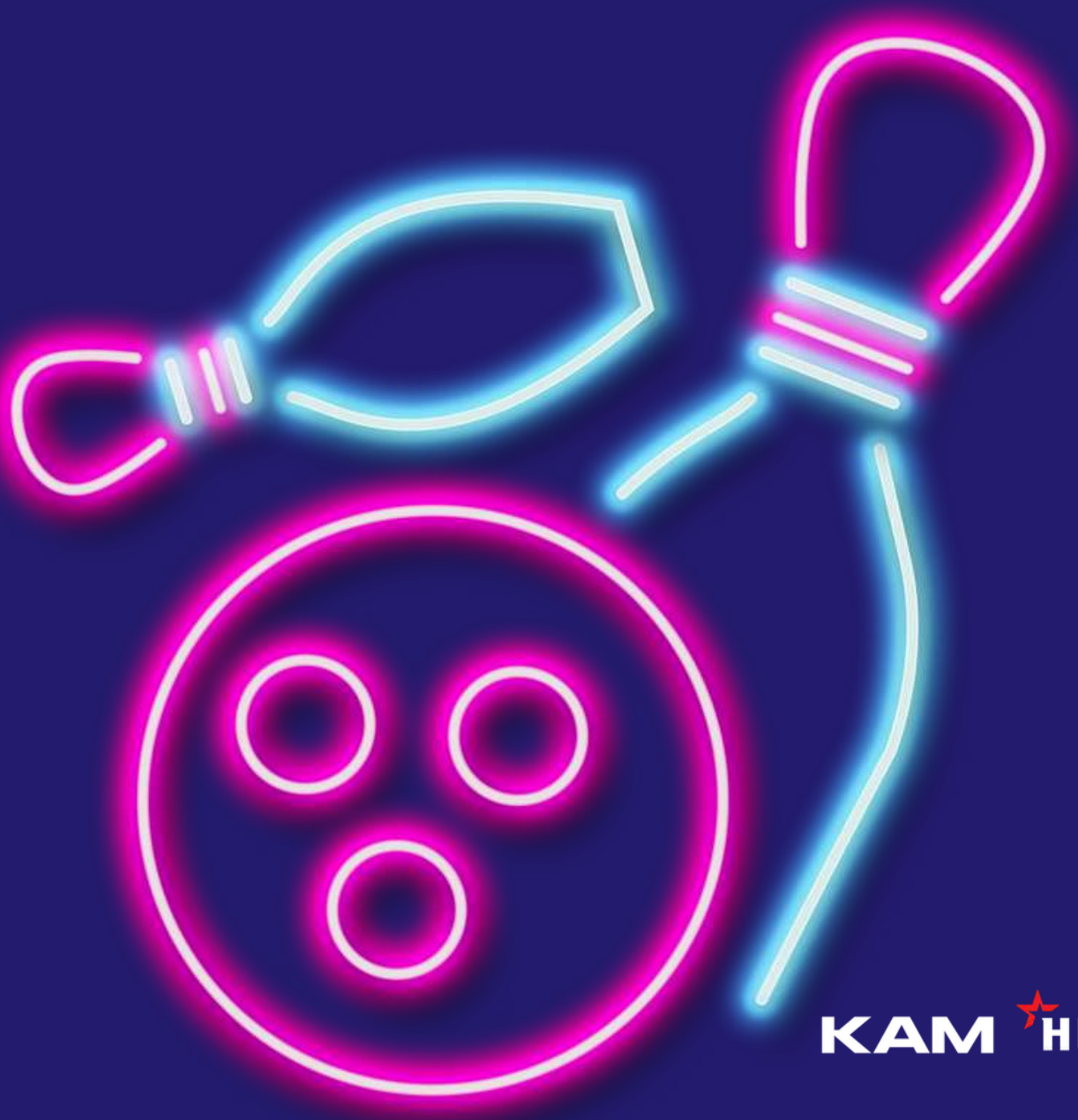


How they want to book...



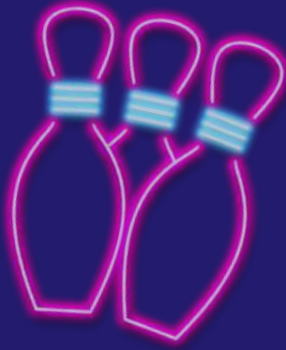
Guests want enough information to make the decision quickly, particularly price, activity details, food and location. Once they're ready to book, the venue website is still the clear preference.

WINNING THE GAME



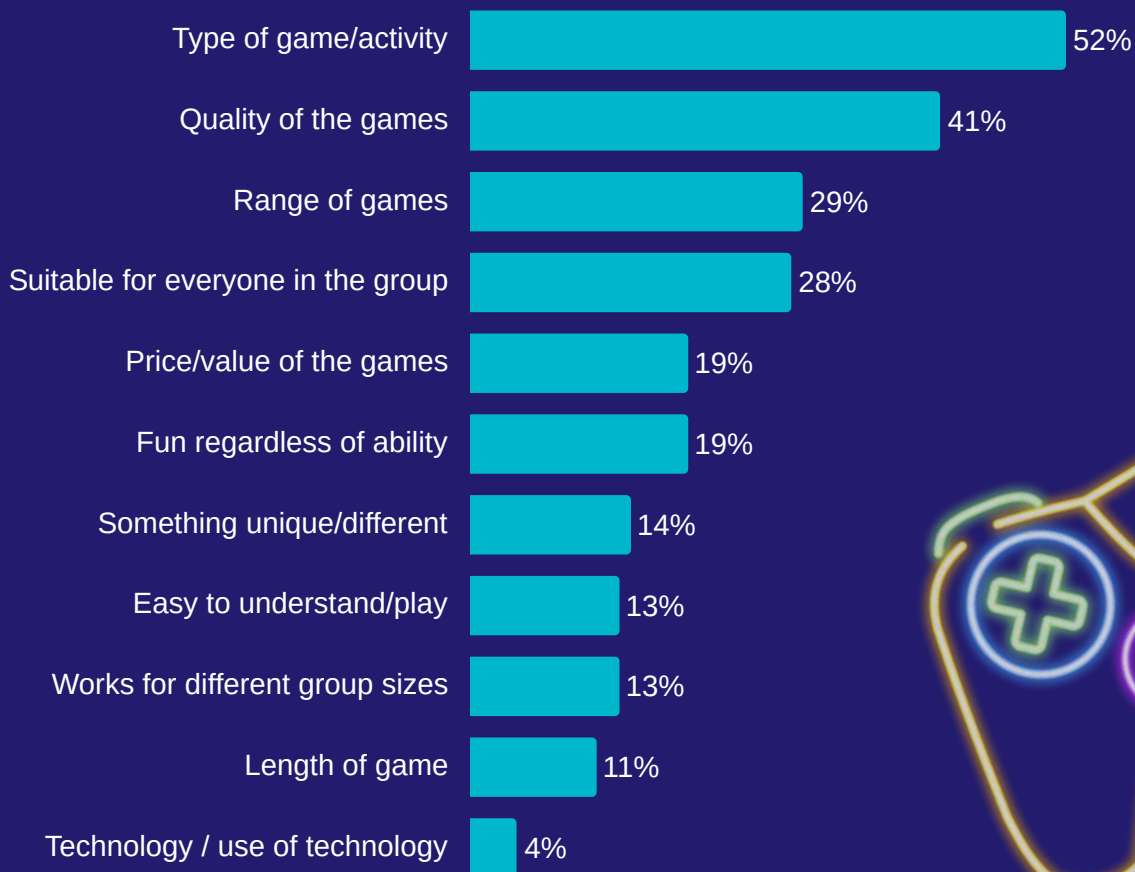
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THE GAME STILL COMES FIRST



Game choice and game quality dominate. Guests want activities they actually want to play, with enough variety to keep the visit interesting and options that work for the whole group. What they don't particularly care about is technology for technology's sake. At just 4%, tech sits well behind the basics of type, quality and range.

What matters most about the games when choosing a venue:



THE GAMES GUESTS LOVE MOST

Arcades have surged to become the clear favourite in 2026, while established formats such as crazy golf and bowling remain strong. Meanwhile, the virtual formats that surged in 2024 have fallen back, showing how quickly tastes can shift. Classic games still have broad appeal, but the strongest concepts give familiar formats a fresh twist through gamification, presentation and technology. The mix needs to keep evolving with what guests want to play.



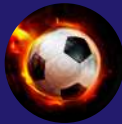
1 Arcades 42% (up from 20% in 2024)



2 Crazy/adventure golf 25%



3 Ten-pin bowling 25%



4 Football-related games 22%



5 Bingo 20%



6 Darts 18%



7 Board games 17%



8 Axe throwing 13%



9 Escape rooms 13%



10 Pool 13%

CASE STUDY:

Roxy Leisure Keeping the games fresh



Roxy Leisure has built its offer around variety. Across its venues, guests can choose from a broad mix of games including bowling, crazy golf, darts, pool, shuffleboard, table tennis, arcade games, beer pong and its own exclusive Crazy Pool concept.

That breadth matters because it gives customers more reasons to return. Rather than relying on one hero activity, Roxy combines familiar games with newer formats, creating venues where groups can move between different experiences in the same visit.

Crazy Pool is a good example of how Roxy keeps that offer fresh. The game combines the skill of pool with the unpredictability of mini golf, with players working their way around a course of specially designed tables. Crucially, every Crazy Pool installation is designed in-house and no two courses are the same, giving each venue its own version of the experience.

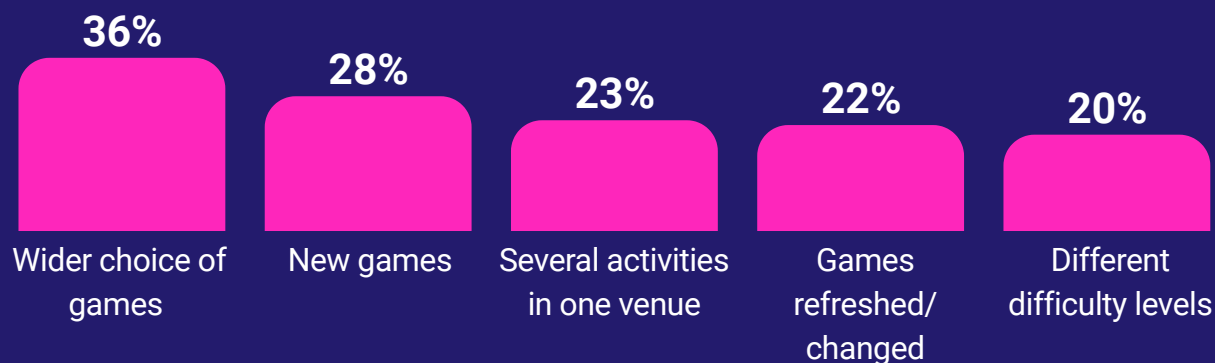
That approach creates variety both across the estate and for repeat customers. It also allows Roxy to keep evolving the game rather than treating it as a fixed format.

Crazy Pool has become one of the brand's most successful activities, now available across 13 venues. In 2025 alone, more than 210,000 games were played, generating £1.7 million in net revenue.

Roxy has also worked hard to keep the activity visible and relevant beyond the game itself. National Crazy Pool Day evolved into a week-long campaign in 2026, with prizes, promotional offers and loyalty-app activity designed to encourage participation. During campaign week, Crazy Pool bookings increased by 35% year on year.

VARIETY DRIVES REPEAT VISITS

What would make guests more likely to return?



Choice helps get people through the door, but freshness gives them a reason to come back. Guests want variety of games within the venue and freshness over time. For operators, that means repeatability needs to be designed into the experience, not left to chance.

58%

prefer a venue with multiple activities

40%

say repeat visits are limited if the games don't change



RELIABILITY BEATS FLASHY TECH

What frustrates guests most about the games?

38% Technology/equipment failure

36% Too much waiting

29% Games finish too quickly

25% Not enough variety

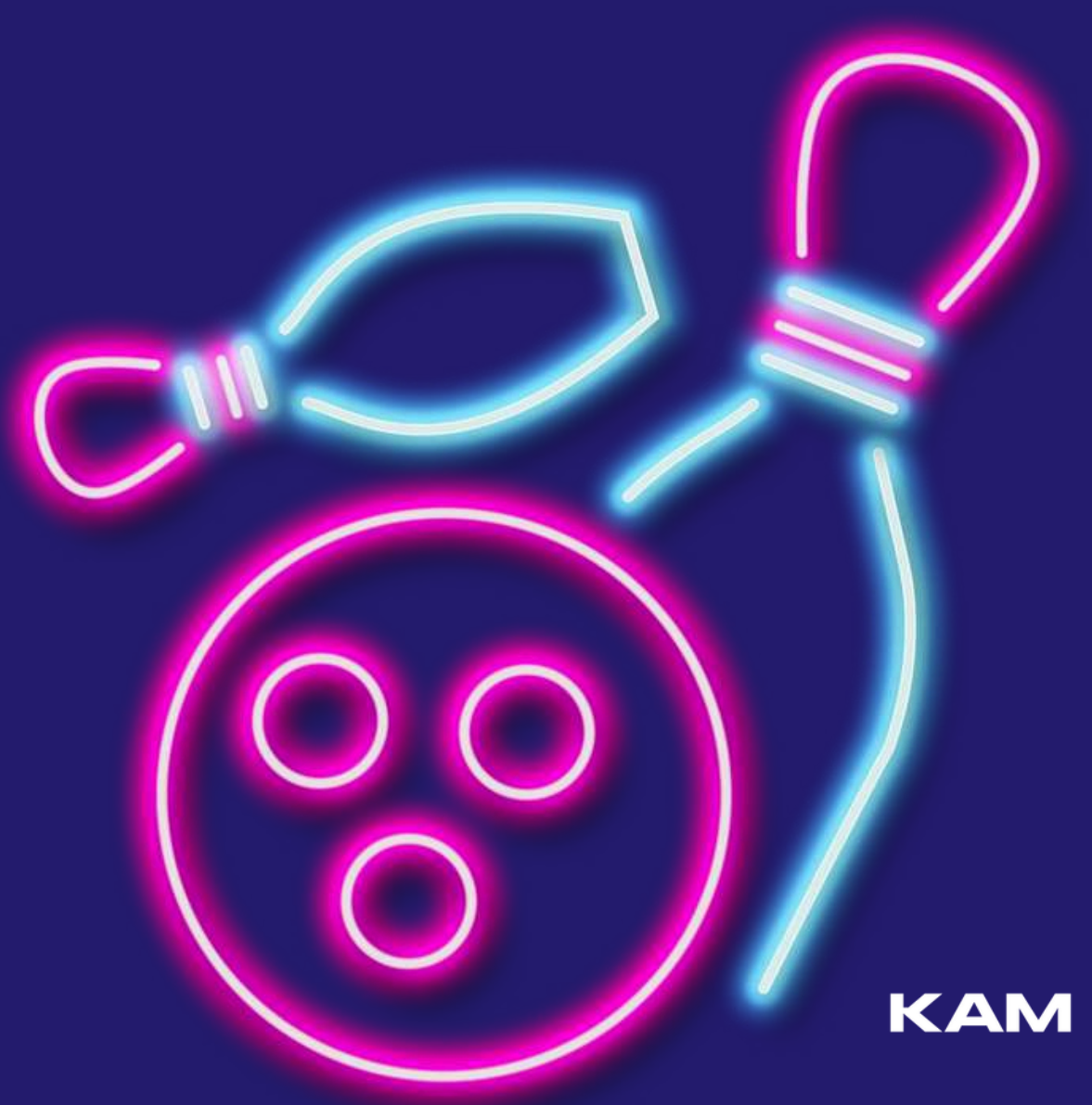
24% Unclear rules

Only 4% said technology itself is important when choosing a venue, but 38% are frustrated when the technology/equipment fails.

Guests don't need technology for technology's sake — but they do expect it to work. Equipment failure is now the biggest frustration, closely followed by waiting too long to play. The basics matter: reliable games, clear rules, sensible pacing and minimal downtime.

FIX THE BASICS BEFORE ADDING MORE BELLS AND WHISTLES

WINNING MORE OF THE F&B OCCASION



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THE F&B EXPERIENCE HAS IMPROVED BUT THE GAME STILL DEFINES DWELL

Competitive socialising operators appear to have made progress on some of the operational pain points. Ordering while playing and finding somewhere to eat or relax are much less of an issue than they were in 2023. But almost half still say they wouldn't stay in the venue unless they were playing, showing there's still work to do to make the venue itself worth lingering in.

What still gets in the way of the wider F&B experience?

2023 compared to 2026



THE GAME BRINGS THEM IN. EXPERIENCE KEEPS THEM THERE.

THERE'S STILL FOOD SPEND WALKING OUT THE DOOR

30%

always/often eat elsewhere **before** the competitive socialising venue

49%

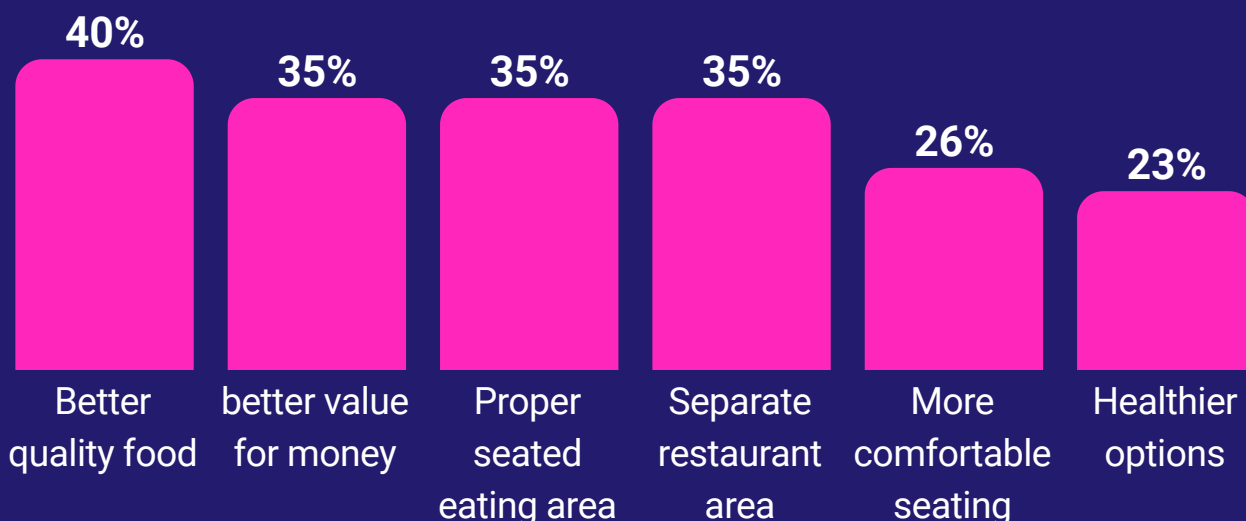
always/often eat **at** the competitive socialising venue

38%

always/often eat elsewhere **afterwards**

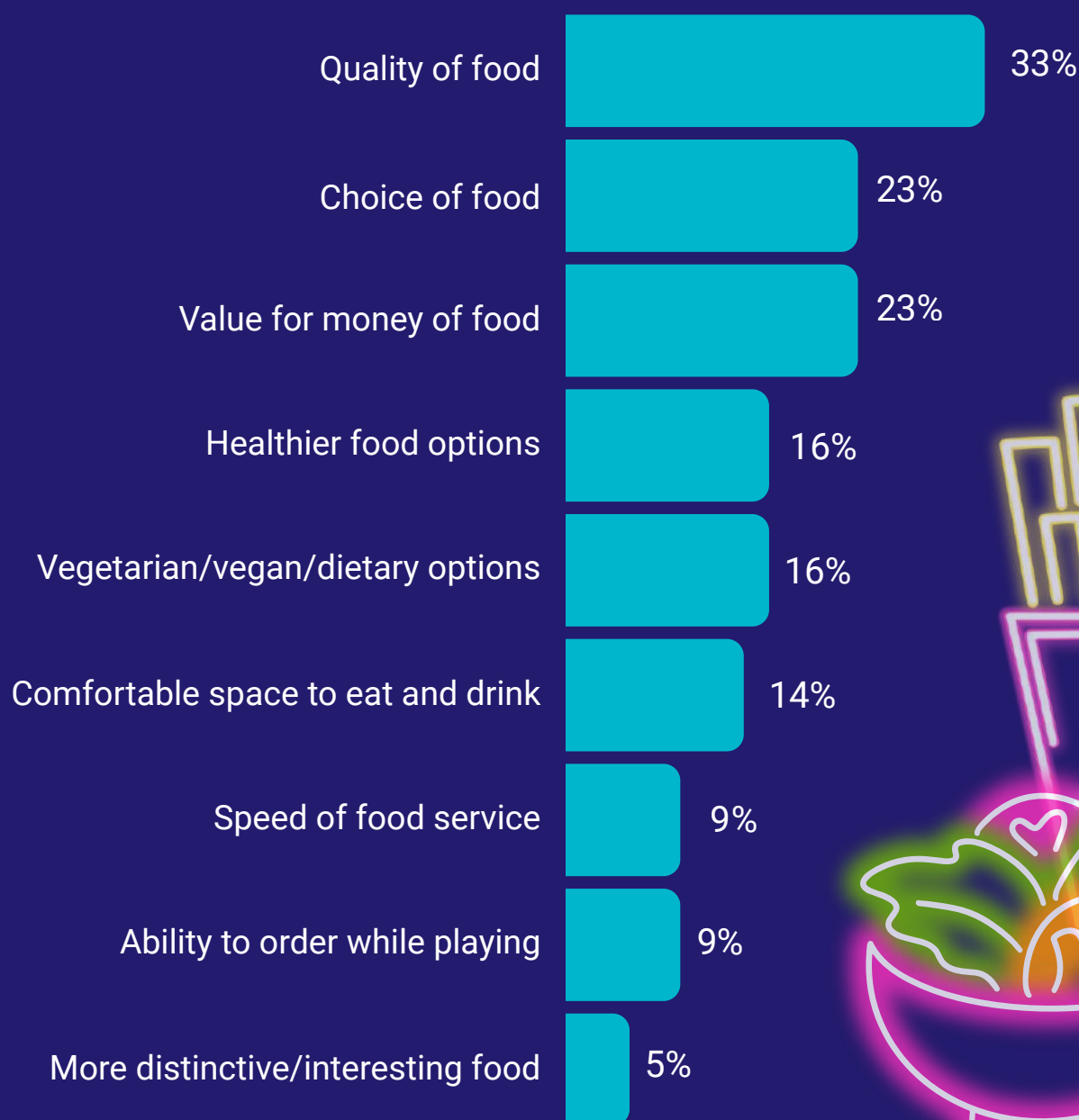
Almost half of competitive socialising guests regularly eat at the venue when they play, but plenty of food spend is still happening elsewhere, particularly after the activity. The biggest opportunities are fairly straightforward: better quality, better value and somewhere comfortable to sit and eat.

WHAT WOULD ENCOURAGE GUESTS TO EAT MORE AT THE VENUE?



WINNING MORE OF THE FOOD OCCASION

What most needs improving in the overall food offer in competitive socialising venues?



DRINKS ARE ALREADY A BIG PART OF THE OCCASION

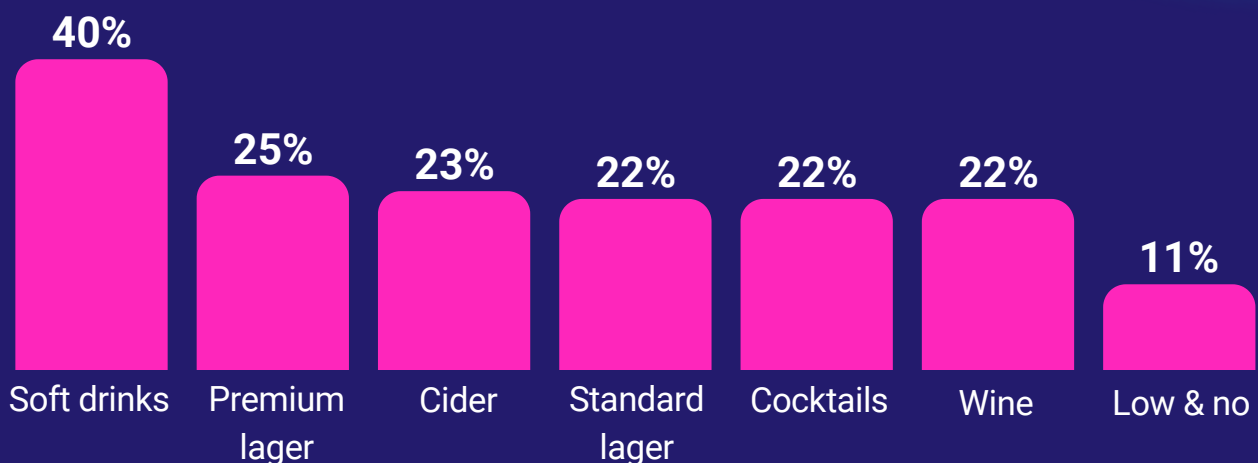
Drinks are already central to the competitive socialising occasion. The mix is broad too, from soft drinks and lager through to cider, cocktails and wine, meaning the opportunity isn't about one drinks category, but getting the overall offer right for different guests and occasions.



41% often/always have an alcoholic drink at the venue

53% often/always have a non-alcoholic drink

What do guests typically drink in competitive socialising venues?



THE DRINKS OPPORTUNITY IS BROADER THAN ALCOHOL ALONE.

THE COMMERCIAL VALUE OF A BETTER F&B OFFER

Improving the F&B offer can directly change customer behaviour, increasing dwell time, spend and visit frequency, while helping keep more of the occasion in-venue.

44% Would stay longer

34% Would spend more on food

31% Would visit more often

31% Would eat at the venue rather than elsewhere

24% Would spend more on drinks

CASE STUDY:

Poolhouse Making F&B part of the main event



At Poolhouse in London, food and drink have been designed to stand alongside the games rather than sit behind them. The menu is built around globally inspired sharing dishes that are easy to eat around the table without interrupting play. The focus is on premium small plates and dishes designed for groups to share between shots, including Wagyu beef sliders, fried chicken baos, tacos, lobster rolls and New York-style pizzas.

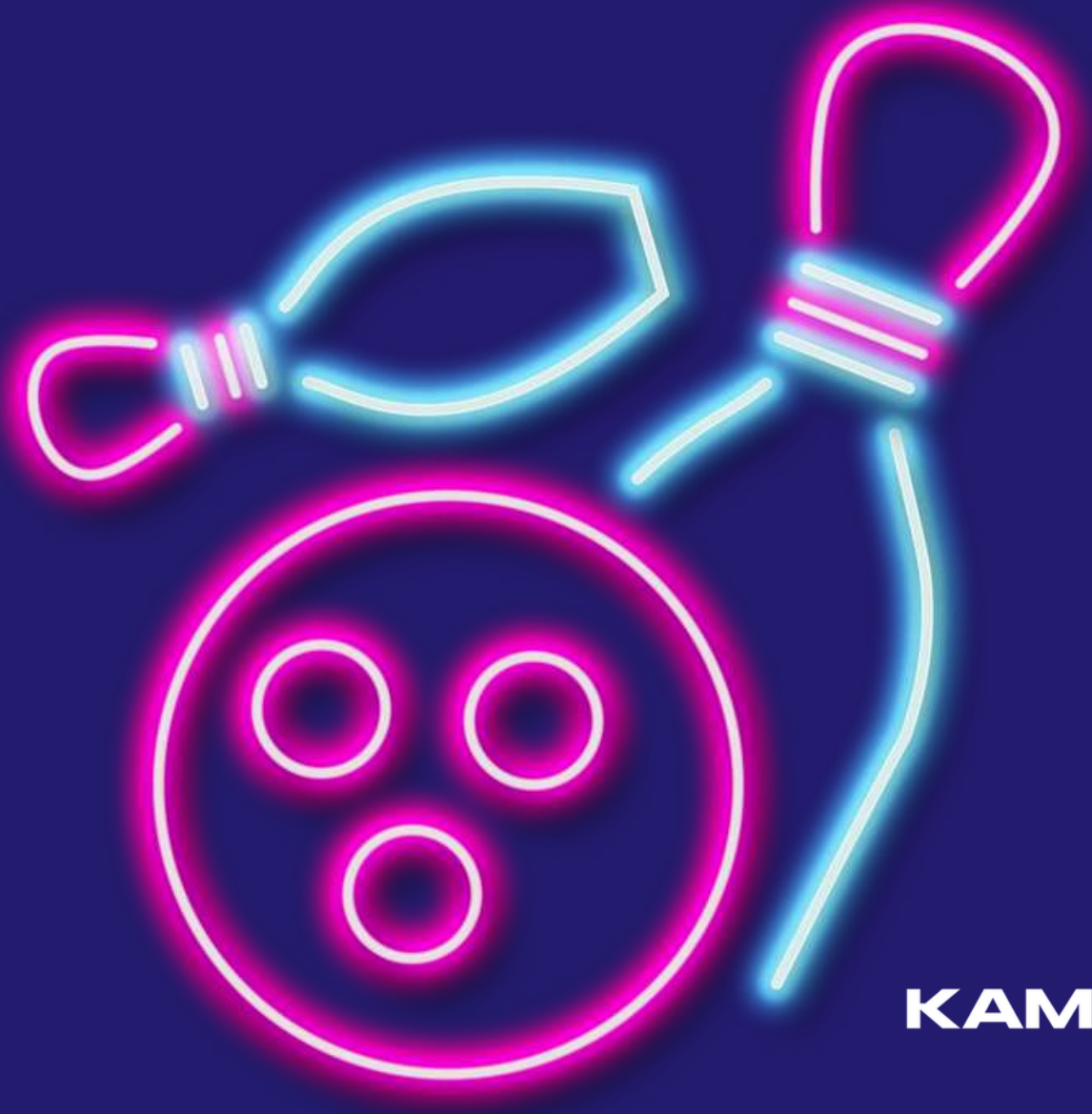
The drinks offer has been given the same level of attention. Poolhouse worked with the team behind Three Sheets to develop a cocktail menu intended to compete with leading London bars, alongside premium spirits, wine and a carefully managed Guinness programme. That includes specialist cellar installation, calibrated gas blends, staff training and strict pouring standards.

Importantly, the offer has been designed around how guests actually use the venue. Food is shareable, service is built around social play and group occasions, and drinks packages and hosted service support corporate events and celebrations without pulling people away from the experience.

There are also small touches designed to create talking points and encourage repeat visits, from branded bao buns and custom hand wipes to a hidden “secret menu” dish that is only available to guests who know to ask for it. Seasonal drinks collaborations help keep the offer fresh too.

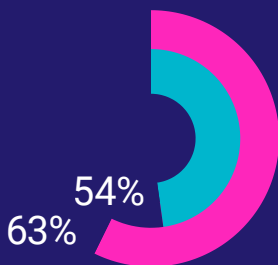
Perhaps the strongest sign that the strategy is working came just two months after opening. Demand from guests wanting to visit purely for food and drink led Poolhouse to adapt its booking platform so customers could reserve bar and dining tables without booking a game of pool. What started as an activity-led venue was already attracting customers for lunch, dinner, after-work drinks and cocktails in its own right.

The rise in demand for activity-led socialising

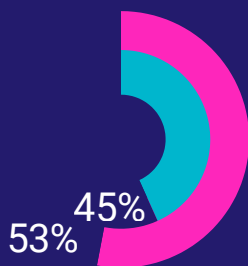


COMPETITIVE PLAY IS GROWING BEYOND DEDICATED VENUES

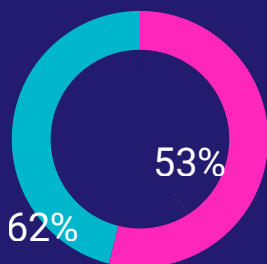
Competitive socialising has extended beyond dedicated venues, with games and activities becoming an increasingly familiar part of the wider pub and bar experience.



have been to a traditional pub that offers an element of competitive socialising



say games make a traditional pub/bar more appealing



would like to see more pubs and bars offer competitive games/activities

2026

2024

Competitive socialising is no longer confined to dedicated venues. Games and activities are increasingly part of the wider pub and bar experience, with almost two thirds of guests having visited a traditional venue offering them in the last year. For pubs and bars, the opportunity is clear: competitive play can add another reason to visit, stay longer and choose one venue over another.

GAMES HAVE BECOME A KEY INGREDIENT IN MAINSTREAM HOSPITALITY.

CASE STUDY:

The Phipps Creating more reasons to visit



For The Phipps in Northampton, diversification has meant using the existing pub space more effectively, creating new reasons to visit and making the venue work harder across different dayparts and occasions.

The family-run pub already had a strong offer built around food, drink, live sport and entertainment. The team reconfigured the bar to create more room for vertical drinking, introduced a dedicated dance floor and raised stage, and transformed underused space into a SingPods karaoke room.

The result is a venue that evolves throughout the day. Live sport provides regular footfall, food and drink support more relaxed daytime visits, while live music, karaoke and late-night entertainment give customers different reasons to stay longer or return.

That flexibility is key. The Phipps caters for families, diners, sports fans, birthday groups and customers looking for a night out, while retaining comfortable seating and flexible areas so different audiences can use the venue in different ways.

Karaoke has added another layer to the offer. By converting previously underused space into a dedicated SingPods experience, The Phipps created a new bookable occasion without reinventing the whole business. It gives groups another reason to choose the pub and helps it compete for celebrations and social occasions that may otherwise have gone elsewhere.

For The Phipps, competitive socialising has become part of a wider entertainment mix rather than a standalone proposition. The commercial logic is straightforward: create more visit occasions, encourage people to stay longer and make better use of the space available.

The key lesson is simple: diversification does not have to mean changing what a pub is. It can mean giving customers more reasons to choose it.

KEY TAKEAWAYS

THE GAME IS NOT THE WHOLE BUSINESS MODEL

Only 42% of personal spend goes on the activity itself. Half goes on food and drink. The commercial win is not just getting people to book a game, it is getting them to stay, eat, drink and choose you for more of the occasion.

REPEAT VISITS DON'T HAPPEN BY ACCIDENT

40% say there is a limit to how often they would return if the games stay the same, while wider choice, new games and refreshed formats are all strong return drivers. Operators need to think more like entertainment businesses: what is the reason to come back next month?

FIX THE BASICS BEFORE ADDING TECH

Technology itself is a low priority when choosing a venue, yet 38% are frustrated when technology or equipment fails. Guests do not want tech for tech's sake, they want the game to work, flow well and feel worth playing.

F&B CAN'T BE AN AFTERTHOUGHT

On food, quality leads the improvement list. On drinks, value and quality lead. Better F&B would make guests stay longer, spend more and visit more often. Before inventing something clever, fix the food, the drinks, the seating and the service.

WIN MORE OF THE NIGHT OUT

71% at least sometimes combine competitive socialising with other hospitality or leisure venues. A lot of food and drink spend is happening before and after the visit. The question is not just "how do we win the booking?" but "how much of the occasion can we own?"

PLAY HAS MOVED INTO MAINSTREAM HOSPITALITY

63% have visited a traditional pub or bar with games, and 62% want to see more pubs and bars offer competitive activities. The threat — and opportunity — is that the lines are blurring. Dedicated venues need to keep raising the experience; traditional hospitality can increasingly borrow the best bits of competitive socialising.

Meet KAM

KAM is a specialist hospitality, food and drink insight consultancy that helps operators, suppliers and investors better understand their customers and make smarter commercial decisions. Through insight-led consultancy, bespoke consumer research and market intelligence, KAM helps clients identify opportunities, improve performance and respond to changing consumer behaviour.

Alongside its bespoke consultancy work, KAM publishes industry-leading sector reports and hosts events that bring together senior leaders from across hospitality, food and drink.

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