The State of Competitive Socialising

October 2025

Insights from **3,000** UK consumers

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Luci Cunningham - Sales Director

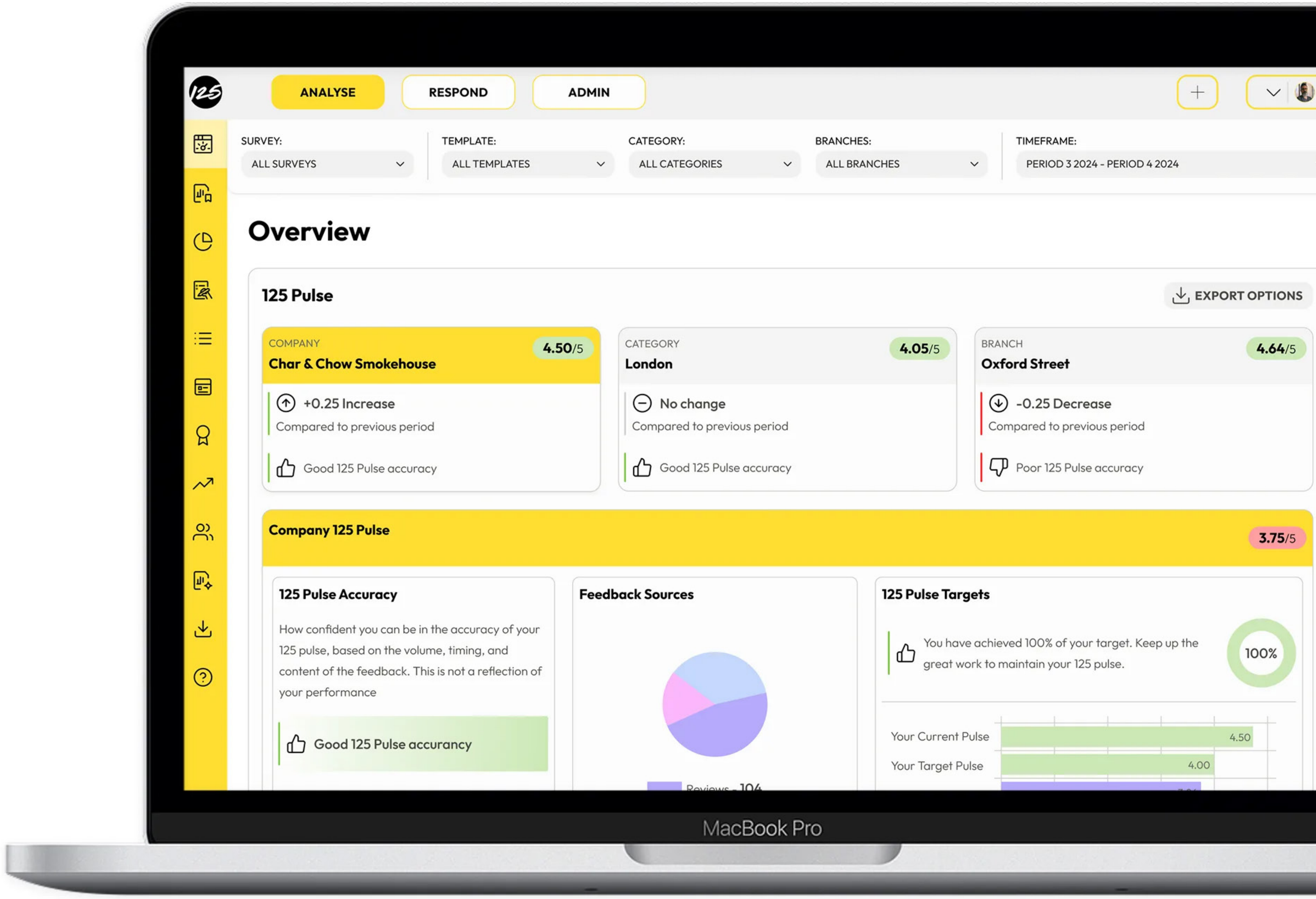
Executive Summary

Competitive socialising continues to carve out a strong role in UK leisure. Consumers see it as an experience-first category where the quality of games and the social environment matter most.

While spending pressures are real, with 57% of respondents saying they have already cut down on their 'leisure' expenses, the sector is proving resilient following years of growth and diversification.

With 38% of consumers visiting competitive socialising venues three or more times a year, and 30% saying it is the sector they are least likely to cut back on, **opportunities do exist to drive growth through pricing strategies, loyalty, and diversifying occasions to make visits feel less "special treat" and more "everyday social option".**

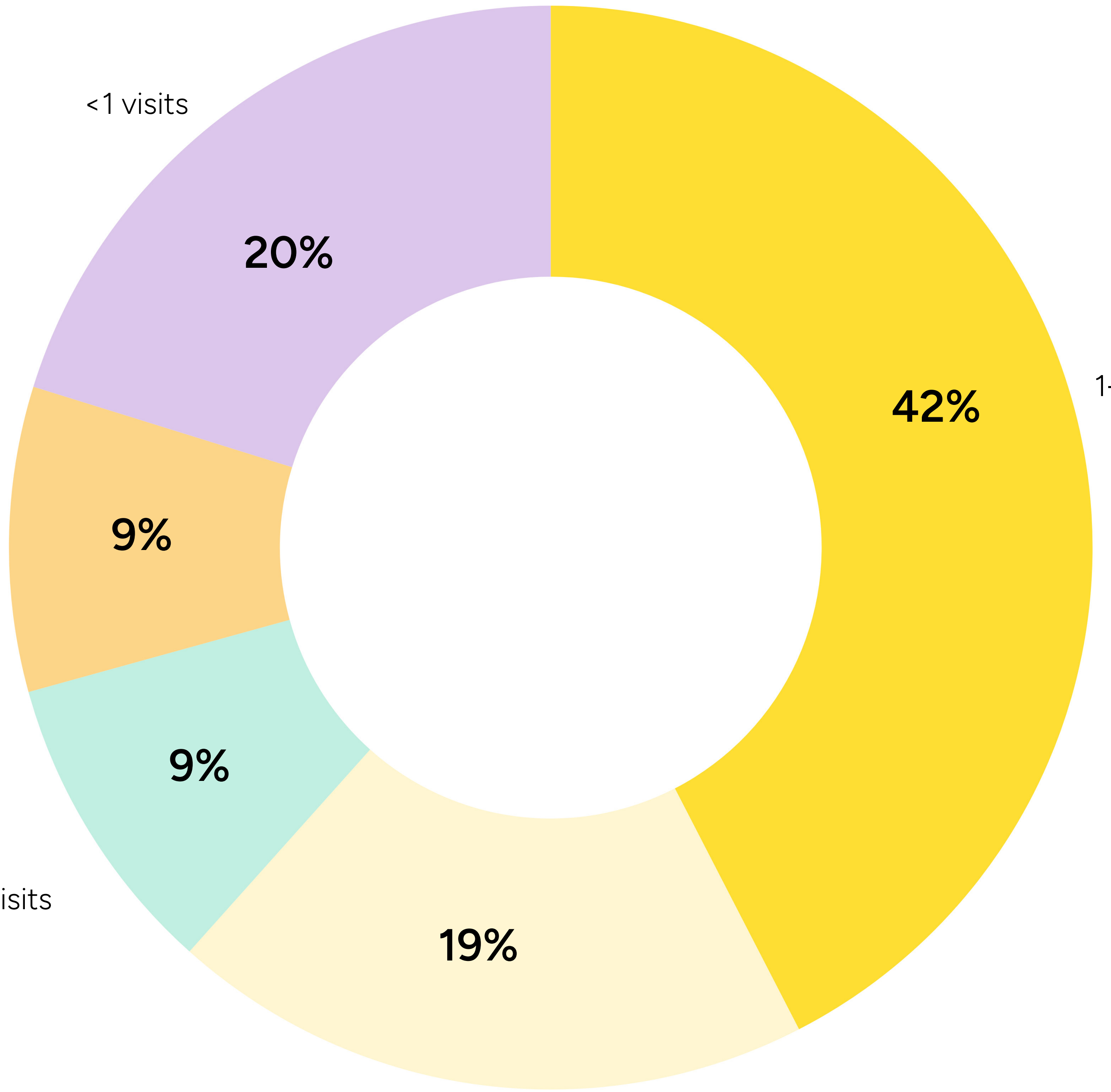
The following data and insights are taken from a survey of 3,000 UK consumers to have visited a competitive socialising venue. The survey was conducted during September 2025.



Visit Frequency and Occasions

The majority of consumers (42%) are visiting competitive socialising venues once or twice a year.

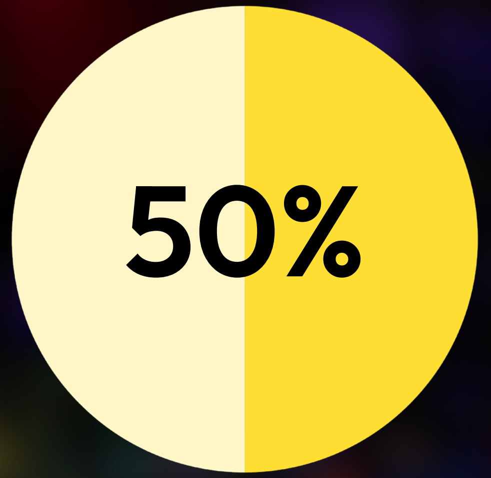
However, it is positive to see that 38% are visiting three times or more each year (19% three to five times, 9% five to ten times and 9% ten times or more).



Occasions driving visits:

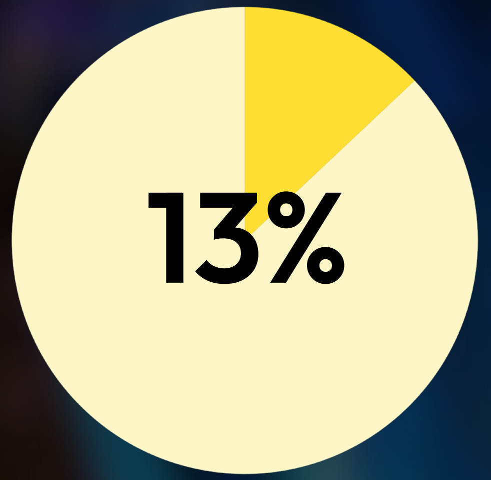
The data suggests that the sector still leans towards being an occasional treat rather than a weekly habit, with family and friends visits dominating 65% of the occasions, as opposed to work parties and date nights at only 15% combined.

Reasons for Visiting and Key Influencers



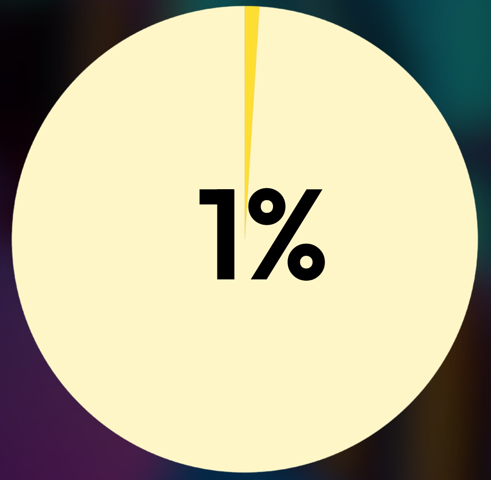
Games

50% of people say the games and activities are the **most important** factor when deciding where to go.



Price

13% stated that price was the most important factor.



Food

1% considered food and drink options as the most important factor.

Influence channels:

Recommendations from friends dominate at **27%**

Digital platforms are also key, with Instagram accounting for 19%, online search 18%, and TikTok 15%

Reviews on Google and TripAdvisor are less influential, accounting for 10% and 3% respectively.

The data is skewed showing that younger users rely more on social and interactive channels for discovery.

When looking at guests' comments, specifically when it involved families, the noise and cleanliness were often cited as reasons to visit somewhere, or a reason not to come back.

"The only reason I would visit competitive venues is if they offered a quieter atmosphere, either all the time, or on set days."

"Maybe not such loud music as it is extremely hard to hear staff or have the reception area in the quieter area."

"Cleanliness is a major factor and ultimately has made us choose one from the other venue."

The data suggests that value is derived from the experience itself of the games and activities. Competitive socialising is seen as an **"experience worth sharing"** – positioning venues well in the social content economy.

Price Sensitivity and Value for Money

Over 82% say activities above £15 per person are too expensive, yet **competitive socialising remains one of the least cut-back social outings,** with quality and atmosphere driving perceived value

- There is a clear price tipping point, with over **82% of consumers saying £15 plus per person is too expensive** for the cost of the activity.
- Once again the **quality of the games and activities stood out** as having the biggest influence on value for money - with 67% of respondents stating this.
- This was followed by the overall vibe (19%) and quality of service (11%) with **food and drink hardly taken into consideration.**
- **57% of respondents state to have either cut back** a lot (24%) or cut back a little (33%) in terms of spending money on eating, drinking and socialising out in general. Over a quarter (26%) said their spend patterns hadn't changed.
- The occasions that have been cut back the most are restaurant dining (40%) and nights out (28%) with **30% saying competitive socialising is the area they are least likely to cut back** on.

82%

say anything over £15 per person is too expensive for an activity

67%

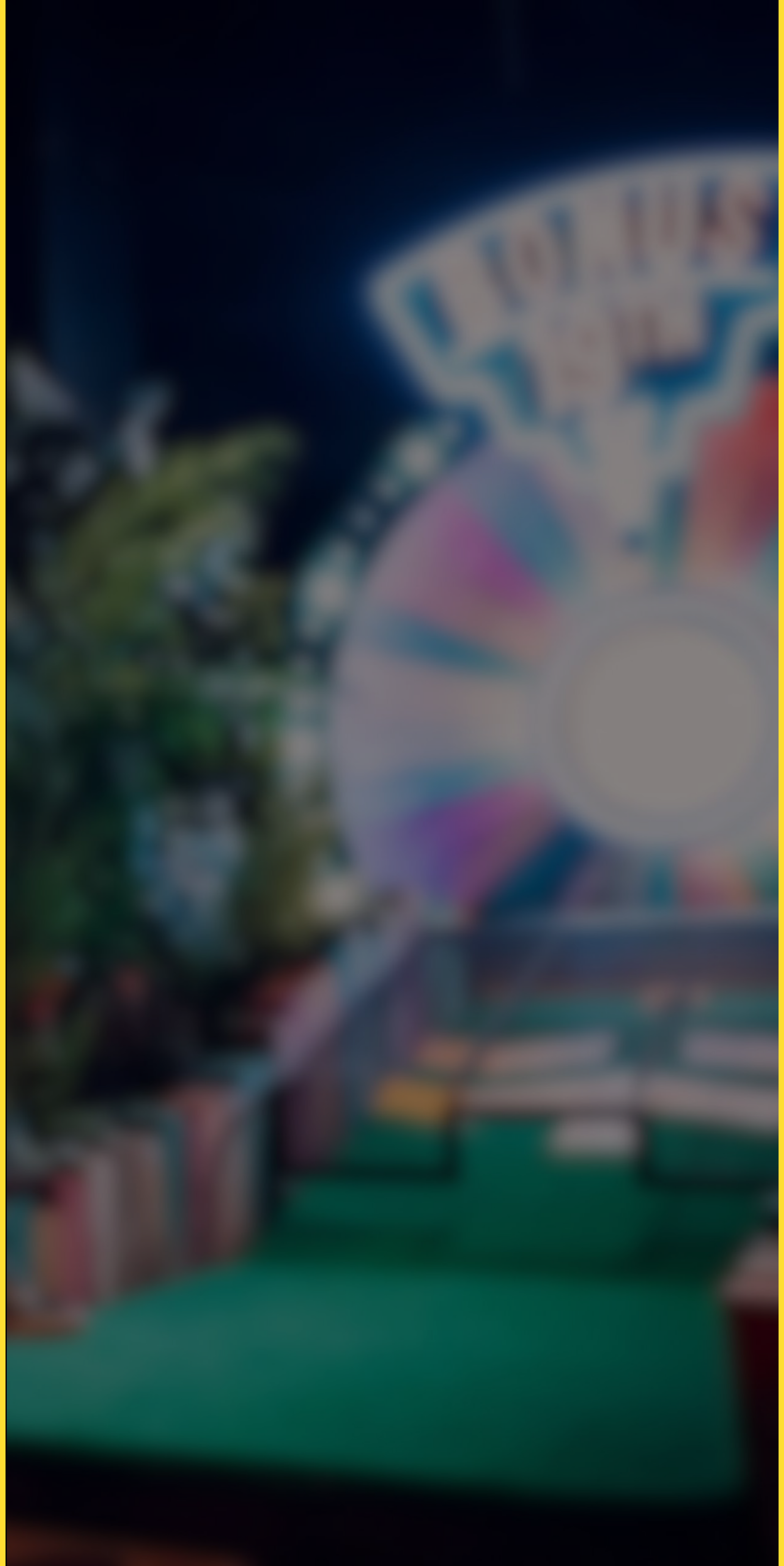
say game and activity quality drives value for money

57%

have cut back on eating, drinking, and socialising out

30%

say competitive socialising is the occasion they are least likely to cut back on



What was clear from customer comments is that price or value was often linked to how busy the venue was and the length of the games. If too quiet then there isn't any buzz and the atmosphere is flat, but equally if it is too busy people are paying to queue or wait. There's definitely a fine balance between price and capacity.

"18 quid for an hour when it's dead or quiet is a bit much."

"Price isn't off putting, what is off putting is the length of time the activity lasts."

"Considering what we paid, we only got 50% of the activities due to long waiting times."

When it comes to families, ensuring flexibility in ticket prices for quieter times, for different aged children and those with disabilities was also often cited.

"Membership at a good price would be a possible contender if the value for the entertainment vs the time I can invest in visiting would be competitive."

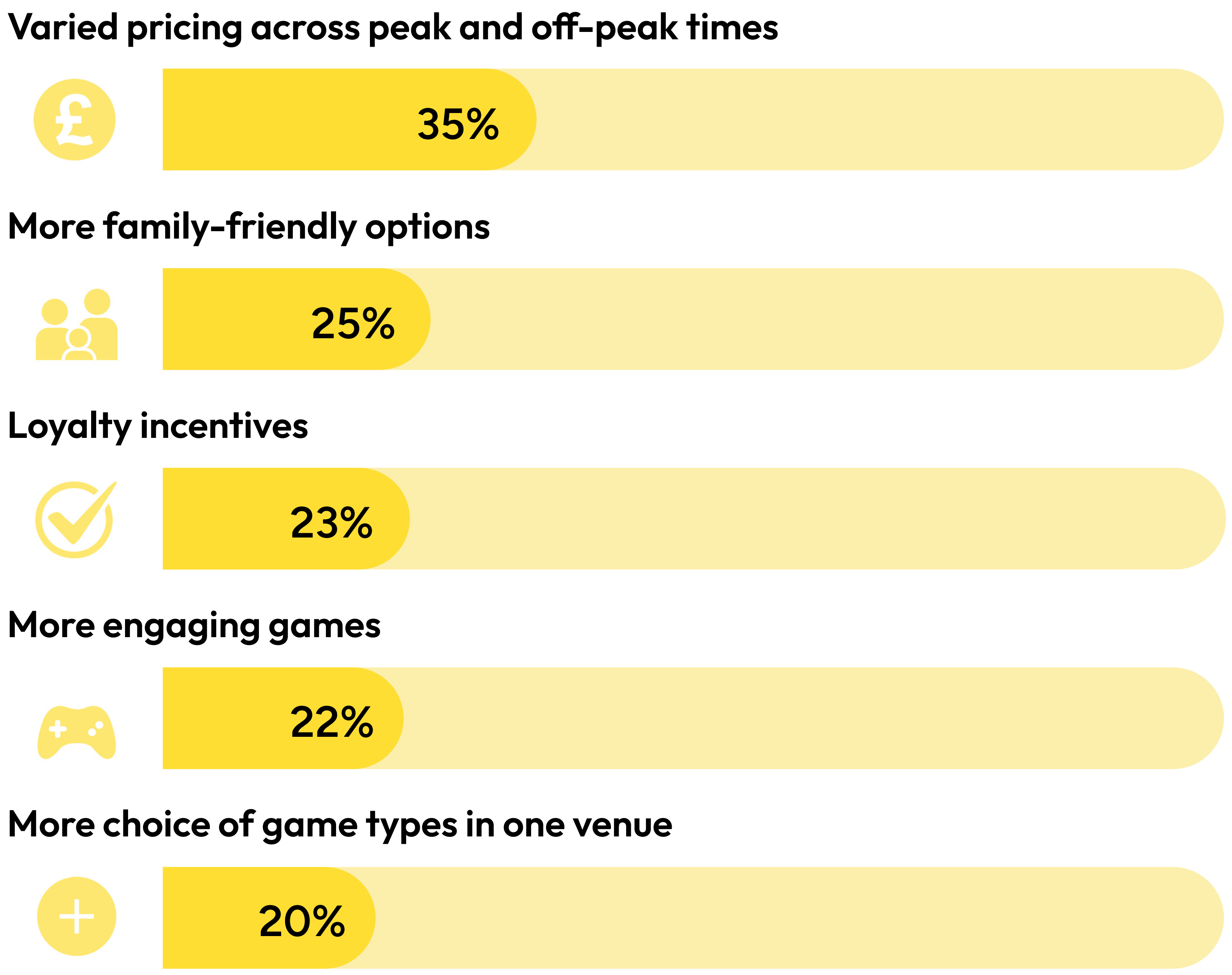
"Disability discounts. I had to pay an adult price, but spent a lot of time keeping my autistic son safe."

"Having options to suit our family and the range of ages we have so it's fun for all."

Consumers are price-sensitive but still willing to pay for unique, high-quality experiences.
Competitive socialising appears slightly more resilient compared to traditional hospitality categories.

Drivers to Increase Visit Frequency

The **top drivers** that would encourage **more frequent visits** are:



There is a sense of wanting to make the experience more competitive and bring in pricing packages or bundles, especially around peak and off-peak times.

"Price ranges for specific times to make the trip more affordable. On and Off peak times."

"Happy hour or continue the offer in the week where you have unlimited games for a set price."

"Family bundles for money saving as children's days out are so expensive and it makes it more accessible for everyone."

"I would like to have more challenging games for the players."

"In game competitions for free drinks or further money off games."

"Limited-time special events would be cool."

There is a clear opportunity to broaden the appeal. **Dynamic pricing, loyalty programmes and family-inclusive formats** could shift the category from an occasional treat to a more regular social activity. Continued investment in variety and innovation in games will also be critical to drive repeat visits.

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