

# Competitive Socialising Investment Insight

*Data-Led Analysis for Investors*



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## The Experience Economy

The UK leisure sector is undergoing a drastic transformation. Traditional models built around alcohol-led nightlife are facing sustained pressure from changing consumer habits, rising operating costs and declining footfall.

At the same time, experience-led leisure formats that prioritise social interaction, participation and immersion are gaining momentum. Competitive socialising has emerged as one of the most innovative responses to this shift.

Rumble Rooms™, operated by Primal Playground Limited, the lead franchisee, is a competitive socialising concept developed in response to these market dynamics.

The venues blend entertainment, food, drink and social connection into a single destination, creating environments designed for engagement rather than consumption alone.

**BBC**

'Young People aren't clubbing'



### Traditional Nightlife in Decline

Almost 1,000 night-time businesses have closed in the East of England in the past five years. As of June 2025, that number had dropped to 6,042.

Source: [BBC, 22nd July 2025](#)

**the drinks business**

"Experiences are increasingly at the heart of going out."



### How Brits will go out in 2026

Data uncovers three major trends that highlight growing consumer shifts. 2026 will be the year to test fresh experiences.

Source: [The Drinks Business, 2025](#)

**savills**

"The immersive sector is no longer new and untested, it has evolved, and with it has the property market

- Jessica Hill, Graduate Surveyor, Central London Retail

### The Rise of Social Experiences

Competitive socialising has firmly established itself as a stalwart of the leisure market, whilst immersive leisure is the fastest-growing subsector in the UK's major city centres

Source: [Savills Insight & Opinion, 2024](#)

## Is competitive socialising a fad or the future of UK leisure?



This video examines the rise of experience-led social venues and what it means for the evolving nightlife landscape. The discussion provides useful context on why these venues are gaining traction among younger demographics and why the sector is attracting increasing attention.

# Market Data

Independent research and industry reporting point to sustained momentum across experience-led venues.

These formats benefit from longer dwell times, group-based bookings and repeat visits, which support more resilient revenue profiles compared with traditional hospitality models.

For investors, this shift is significant. Experience-led leisure concepts aligned with changing consumer behaviour are positioned to capture a growing share of discretionary spending.

As competitive socialising continues to scale, businesses operating within this segment may benefit from both operational growth and increased strategic interest across the wider leisure and property markets.

## 40% Competitive Socialising Venue Growth

The number of competitive socialising venues in the UK has increased by approximately 40% since 2018, reflecting sustained demand for interactive, experience-led leisure formats.

## 800+ Venues Forecast by 2029

Industry forecasts suggest the UK could exceed 800 competitive socialising venues by 2029 as experiential leisure continues to expand across major cities.

## Decline of Traditional Nightlife

Traditional pubs, bars and nightclubs have experienced declining footfall as consumer habits shift away from alcohol-led socialising towards activity-based experiences.

## Shifting Drinking Trends

Younger demographics are drinking less than previous generations, accelerating demand for social venues where alcohol is complementary rather than central.

## Longer Dwell Times & Repeat Visits

Experience-led social venues typically benefit from longer customer dwell times and higher repeat visitation, supporting more resilient leisure models.

## Rising Institutional & Landlord Interest

Competitive socialising formats are attracting increased interest from landlords and institutional operators seeking leisure tenants that drive footfall and engagement.



## Rumble Rooms at a Glance



### First Venue Opened

December 2024  
Milton Keynes



### Proven Founders

Rich Beese & David White  
*Entrepreneurs with prior experience founding and scaling Boom Battle Bar, one of the UK's best-known competitive socialising brands.*



### Track Record

Previously founded Boom Battle Bar  
Acquired for £18m within ~18 months



### Sector Focus

Competitive socialising  
Experience-led leisure venues



### Expansion Strategy

Multi-site UK rollout  
Major city locations targeted



### Institutional Market Validation

Competitive socialising attracting  
increasing landlord & investor interest

#### Sources:

- Savills Research, [UK Leisure Spotlight/Competitive Socialising](#)
- Office for National Statistics (ONS), [Economies of ale](#)
- BBC News, [Why are so many pubs and clubs closing?](#)
- Yahoo Finance UK, [Young people are drinking less](#)



# A Scaled Brand Within a Global Leisure Group

Rumble Rooms is a competitive socialising brand and has awarded a development buildout to Primal Playground Ltd as a Franchisee, to acquire, build and operate the brand throughout the UK. Rumble Rooms sits within the We Do Play portfolio of companies, a global leisure and hospitality group owned by MFT Capital Ltd.

We Do Play develops and scales immersive leisure concepts across multiple formats, including Activate, Flip Out, Laser Quest, VRXtra and PuttPutt Social, positioning the group as a platform operator within the competitive socialising and experiential leisure market.

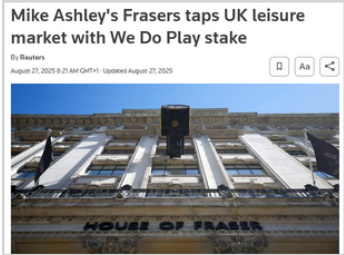
In August 2025, Frasers Group, the FTSE 250 retail group controlled by Mike Ashley, acquired a strategic stake in We Do Play as part of its diversification into experience-led leisure, reflecting growing institutional confidence in scalable, activity-based social formats.

The team behind Rumble Rooms previously founded Boom Battle Bar, which grew to become the UK's largest competitive socialising brand before being sold in November 2021 for £18 million.

Following the expiry of a competitive restriction period at the end of 2024, the team returned to the sector with the launch of Rumble Rooms.

The first Rumble Rooms venue has opened in Milton Keynes and is fully operational, providing an initial trading base ahead of further expansion.

# Independent Media Coverage



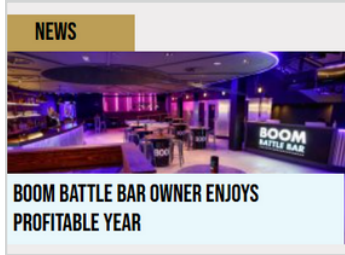
Frasers, owned by British retail tycoon Mike Ashley, has entered the leisure activity market with a stake in We Do Play, the operator of gaming and socialising venues Activate and Rumble Rooms. Source: [Reuters](#)



Frasers, which runs Sports Direct and House of Fraser, said it will be the company's first move into the UK leisure market. We Do Play also runs the Putt Putt Social and Rumble Rooms brands. Source: [The Independent](#)



The new opening has created a "social jungle" where customers can enjoy drinks and take part in some of the games on offer including axe throwing, shuffleboard, beer pong, darts, arcades and karaoke. Source: [Catering Today](#)



Group adjusted EBITDA rose to £10.5m from £9.9m, while adjusted operating profit was £3.5m. The growth is attributed to the number of openings over the past year. Source: [Pub & Bar](#)



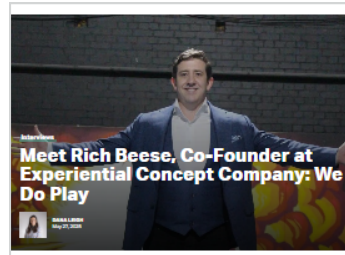
Activate, the fast-growing immersive leisure brand, is levelling up its presence in the capital with three new London venues launching before Christmas 2025. Source: [Premier Construction News](#)



Flip Out Leeds, one of the world's biggest indoor adventure and trampoline parks, has welcomed 120,000 visitors in the first three months since it opened in October. Source: [Yorkshire Evening Post](#)



Are you ready to rumble? Rumble Rooms Milton Keynes – Where the fun never stops! It's the best spot for birthdays, nights out, or just some friendly competition. Source: [Promotional Video, Rumble Rooms](#)



"We will continue to innovate and surprise the market. I'm always on the lookout for fresh and engaging ideas and want to continue the company's expansion." Source: [TechRound](#)



## Enterprise Investment Scheme (EIS) Overview

The Enterprise Investment Scheme (EIS) is a UK government initiative designed to encourage private investment into early-stage trading companies by offering tax reliefs to qualifying investors, subject to individual circumstances and HMRC rules.

The scheme is intended to support business growth by improving access to development capital while recognising the higher risks associated with early-stage investment.

## A Platform Built for Expansion

Investment into the Rumble Rooms opportunity is structured through the lead franchisee, Primal Playground Ltd. The structure has been designed to support the rollout of experience-led leisure venues while aligning with the Enterprise Investment Scheme (EIS) framework. The franchise-led model enables rapid expansion while benefiting from central brand development, operational expertise and group-level support.

This approach is designed to support scalable growth across multiple locations while aligning with the Enterprise Investment Scheme (EIS), creating an attractive framework for investors seeking both growth potential and tax efficiency.

## Key EIS Investor Benefits

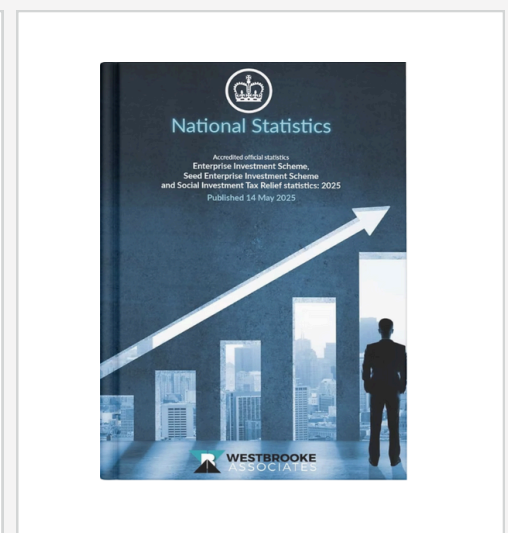
For qualifying investors, EIS offers several potential tax advantages designed to support investment into early-stage trading businesses, subject to individual circumstances and HMRC rules:

- ✓ Income tax relief of up to 30% on qualifying investments
- ✓ Capital gains tax exemption on shares held for the required period
- ✓ Capital gains deferral relief, allowing existing gains to be deferred
- ✓ Loss relief, designed to reduce downside risk, in the unlikely event that the investment underperforms

Combined with a franchise-led expansion strategy and exposure to a fast-growing leisure sector, the EIS structure amplifies the overall risk-reward profile of the Rumble Rooms opportunity.

## EIS Investor Resources

*Click to view supporting materials:*



# The Perfect Market Timing

The UK leisure sector is undergoing a significant shift. Traditional, alcohol-led nightlife is facing declining footfall as consumer preferences move towards more immersive and participatory social experiences. This change has created a clear moment where established formats are losing relevance and new leisure concepts are gaining traction.

## Why Rumble Rooms is Well-Positioned

- ✓ **Experience-Led Concept:** Designed around interactive social activities rather than passive drinking.
- ✓ **Reduced Reliance on Alcohol:** Food and drink complement the experience instead of driving it.
- ✓ **Proven Leadership:** Founders with previous experience scaling competitive socialising venues.
- ✓ **Scalable Format:** Suitable and ready for rollout across multiple UK cities.
- ✓ **Timing Advantage:** Entering the market as demand for immersive leisure accelerates.



## A Leisure Market Ready for Change

Industry commentary increasingly highlights demand for social venues that offer participation, consistency and atmosphere. As traditional nightlife struggles to adapt, experience-led leisure formats are filling the gap between consumer expectations and existing supply.

## Perfect Timing for Rumble Rooms

Current market conditions reflect growing dissatisfaction with alcohol-centric venues and increasing appetite for shared experiences. Competitive socialising sits at the intersection of entertainment and hospitality, aligning closely with these evolving preferences.

## Consumer Expectations

Consumers now prioritise social interaction, engagement and memorable experiences over traditional nights out. Group-based activities and immersive environments are increasingly favoured, supporting repeat visits and longer dwell times.

## Trust as a Differentiator

Experience-led venues differentiate themselves through engagement rather than scale alone. Competitive socialising encourages interaction and connection, creating environments that naturally support sustained customer interest.

## The Case for Early Investment

As consumer behaviour continues to shift, experience-led leisure formats are positioned to capture a growing share of discretionary spend. Rumble Rooms has been developed in direct response to these changes, aligning timing, demand and market momentum.

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