

MILLENNIAL LEISURE AND TOURISM: THE RISE OF ESCAPE ROOMS

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1. INTRODUCTION

This article sheds light on a segment linked to tourism and recreation among the ‘millennials’: escape rooms. The segment is shown to be strongly linked to that generation vis-à-vis the age of the demand and respective entrepreneurship.

The live escape games sector is a recent leisure trend that has undergone extraordinary growth in the last three years. Escape rooms are live-action team-based games in which players discover clues, solve puzzles and accomplish tasks in one or more rooms to achieve a specific goal, usually escape from the site, in a limited time period, generally 60 minutes. The challenge usually covers additional goals such as finding a treasure, a jewel or an important document. These games have become one of the leading leisure activities, according to websites such as TripAdvisor. Indeed, escape rooms usually rank among the top positions in best-rated experiences of main European destinations.

The sector’s background can be found in the last three decades. First, graphic adventures in videogames can be highlighted, where players interact with objects and characters, find clues and solve puzzles to keep progressing in the story. Second, with respect to cinema, the role of certain films linked to adventures, fiction, claustrophobia and mystery, such as the Indiana Jones series (1981-2008), *The Cube* (1997) or *Saw* (2004-2010), can be underscored. Finally, the virtual ‘point and click’ escape games can be emphasized as a direct and primary precedent. The ‘jump’ to the real world occurred in 2011 in Budapest, where an entrepreneur named Attila Gyurkovics took advantage of semi-abandoned lots to create the first tangible escape room. Parapark, as it was called, soon spread as a franchise to other European cities, drawing up-and-coming entrepreneurs.

This leisure trend line is directly linked to the recent boom in urban tourism, the growth of a young and creative class in major cities, emerging millennial tourists and the use of new user-generated content by consumer reviews and blogs (influencers). The literature about such phenomena (summarized in the extended version of this paper) helps contextualize live escape games as both recreation sector and tourism segment.

The aim of this work is to define and characterize the phenomenon, study its evolution and distribution in Spain, and evaluate its leisure and tourism potential. Given the lack of specific literature or data regarding this topic, it became necessary to generate new and direct information via interviews and surveys and to use less conventional information from reviewer websites and blogs.

2. RESULTS: DISTRIBUTION, BUSINESS & DEMAND PROFILE AND TOURISM PERSPECTIVES

At the end of 2016 there were about 5,860 facilities situated in more than 98 countries. In this order, the United States, Canada, Germany, Spain, Malaysia and Australia are apparently the countries that have absorbed most of the business (China and Japan might be added to the list, but they are outside the data used). The sector is particularly widespread in Europe: besides the UK, central Europe and Hungary, it stands out in the east (Russia, Poland, and Rumania) and in the Mediterranean countries, particularly Spain. Global figures report the success of the franchise model in this business, whereby the original idea (and some of the equipment) is sold to different entrepreneurs in different cities of the world. This fact is later verified in a more detailed analysis focused on Spain.

In March 2017 the sector in Spain counted 275 facilities and 498 games, indicative of the activity's extraordinary growth (the mid-2016 figures were respectively 149 and 259). It has spread to all regions and at present only six provinces have no escape rooms. Catalonia (97), especially Barcelona (41) with its metropolitan area (38), has become the activity's epicenter. The Valencian Community (31), Madrid (29) and Andalusia (28) are far behind on the list. The establishment of a significant number of escape rooms outside provincial capitals has been observed, particularly along the coast. With some exceptions, the phenomenon does not seem to have arrived in small cities or rural areas.

A nationwide survey shows the business profile as outlined in this paper: a game based on an original idea (franchises account for about 20% on average), created by one or two partners from 25 to 35 years old. They manage the space and do not usually hire additional staff. This business is their only source of income (55% of those surveyed). The intense level of work is significant, as they rarely close for vacation, have only one weekly rest day and are open both mornings and afternoons. The internet is the gateway for their customers and they therefore pay special attention to their websites (design, multilingual translation, online payment) and review profiles. Depending on the location, the need to have an area of a certain size and the limited initial investment capacity (a factor again linked to the average age of the entrepreneur), have led the activity toward more modern urban expansion areas, where access is easier and prices more affordable. The periphery offers lower prices and more opportunities to add more space and rooms, though a few companies have located on the edge of the city. The survey indicated that the most important factors for managers are, in the following order: accessibility, purchase or rental price, closeness to the tourist area, size of the lot and closeness to other escape rooms. In coastal towns (Benidorm, Torrevieja, Marbella, Conil, Maspalomas) the proximity to tourism paths is particularly relevant. Location

pattern is conditioned by the initial investment: small companies tend to situate on less accessible streets, while franchises and other larger projects are located along avenues and in pedestrian areas and streets near the tourism flow.

Demand is as follows: young customers between 21 and 35 years old (80%), who play mainly with friends (53%), families, couples and co-workers. Decision factors are primarily the game's story (38%) and previous references (32%). Price, unlike the general characterization among the millennial tourist group, here becomes a subsidiary factor, which may be related to the relatively high age (the 31-35 group is predominant). Location seems to play a secondary role behind the story and the quality of the game.

What is this sector's importance as a tourism activity? The research indicates that 26% of the demand corresponds to tourists. For site operators this group is relevant and will become more important in the future, especially in major cities. Although born as a form of local entertainment, escape rooms soon became tourism products. Early fans began to direct their short weekend trips to destinations with escape rooms. While the main reasons for such trips were generally others (culture, sun and beach, family visit, etc.), the existence of escape rooms has become a decision-making factor. A survey of users of the Escape Room Lover blog (sample size 1,100), indicates that half include this activity in their travel plans, sometimes (29%) or always (21%). Although still on a minor scale, the newly arrived 'escape room tourism' is formed by people who travel with the main motivation of playing in escape rooms. Initial consolidation of this segment has been verified by recognition in Lonely Planet's prestigious travel guides and on institutional websites (VisitLondon, Parisinfo), as well as the creation of alliances among companies and subsequently of escape leagues or routes which stimulate customers to play in different cities (e.g. the 'northern Spain route' or the 'mysteries of Castile').

3. CONCLUSIONS

Several conclusions can be outlined based on the results obtained.

In an increasingly technological and digital world this live offline experience is apparently thriving. Escape games have several characteristics that explain their outstanding success: real interaction with objects, disconnection from the 'outside world', emotion of the moment and group dynamics.

The sector's main weakness is that it offers a service without repetition, i.e. capture of local customers is equivalent to reduction of future users in the more immediate surroundings. Here tourism is significant; as the site's customer population becomes exhausted, attraction of tourists becomes a key company strategy.

Diversity of rooms becomes the sector's main strength as a tourist segment. Once the activity's enthusiasts overcome the challenges available in their local areas they seek new challenges as tourists in other cities. This research establishes a link between escape rooms and travel, to the point that escape-room tourists do exist.

This activity aligns with the current paradigm of tourism development: sustainability, value of experience, contact with natives and promotion of local culture. It strengthens and diversifies the economy, involves entrepreneurship and employment (especially

among the younger generation), expands tourism areas, promotes dialogue between locals (game creators) and visitors (players) and, finally, provides a unique experience (in line with creative tourism). However, the growing spread of franchises and the relatively little connection between the narratives and local culture are signs of standardization. More emphasis should thus be placed on local history or legends.