INTEGRATED INSIGHT

Navigating the New Leisure Landscape

Presented by:

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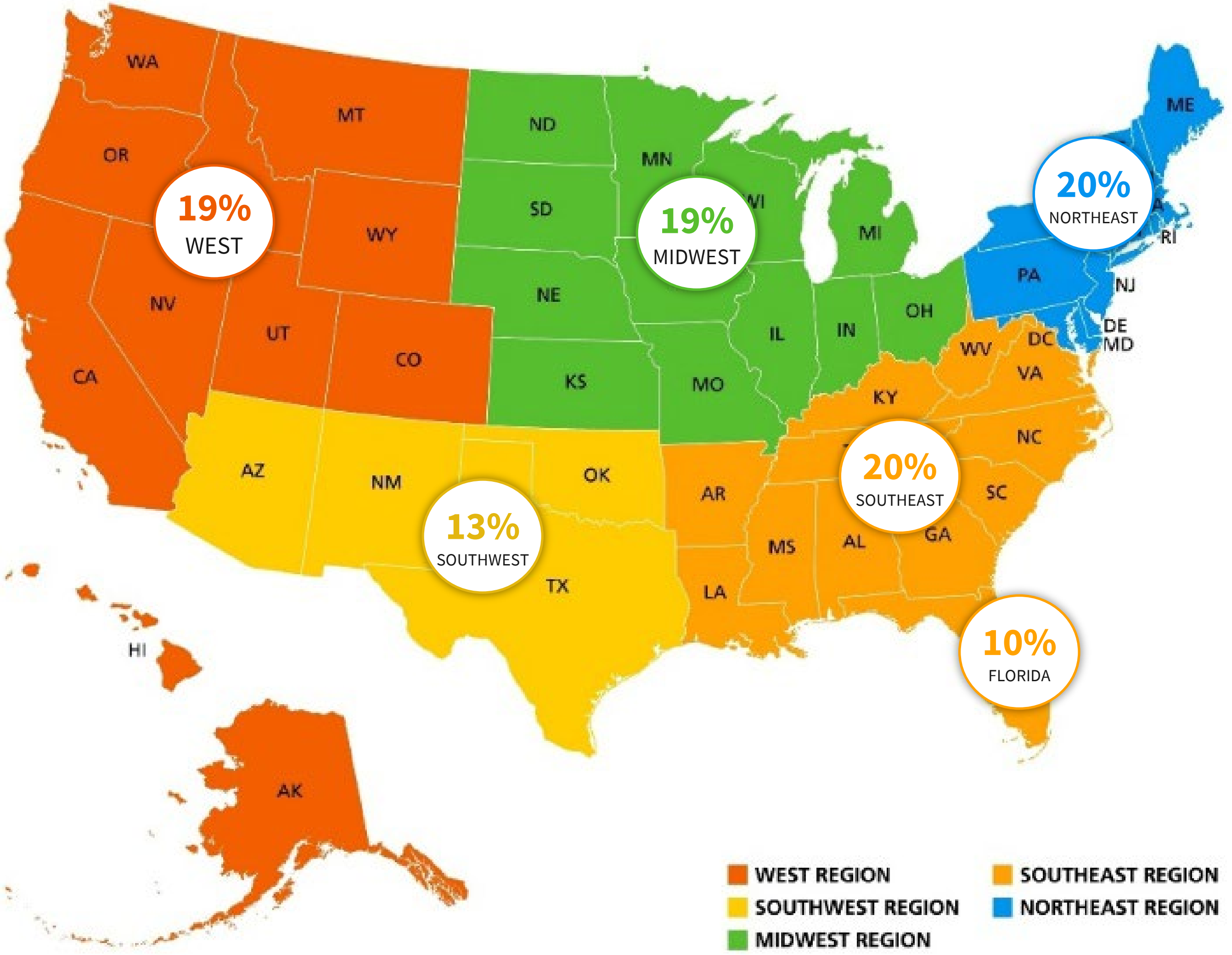
A Word About The Survey

Understanding how “attraction consumers” make decisions helps inform product and marketing strategies.

7,200 respondents, representative of the U.S. population, started the survey.

2,350 successfully made it through the screener:

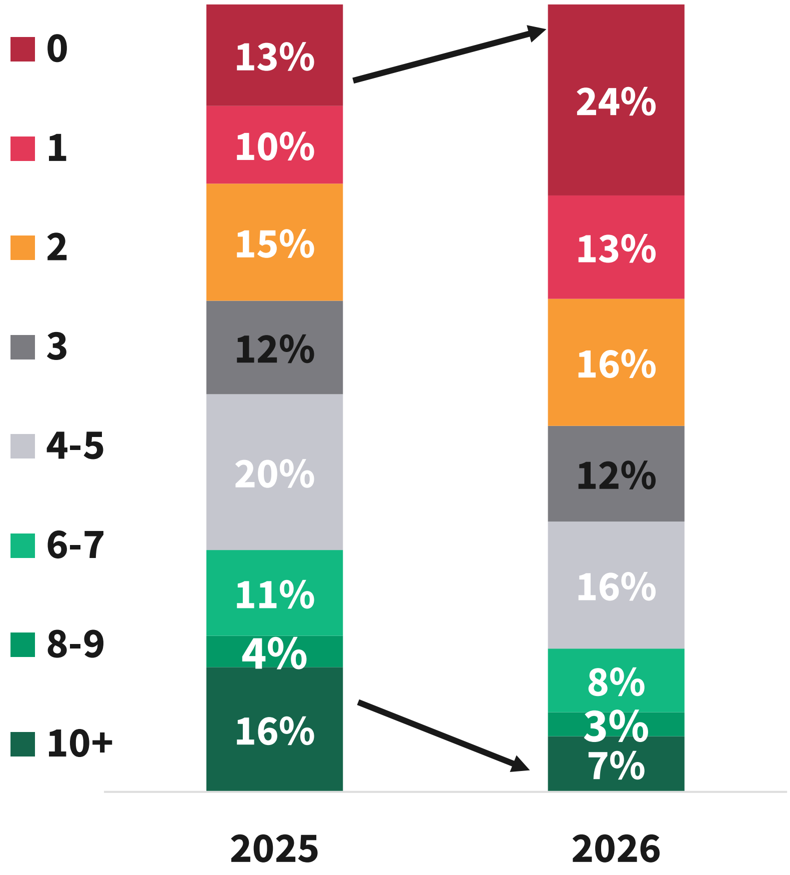
- ✓ Ages 18-70
- ✓ Minimum household income of $35K with brackets for income levels
- ✓ 8-10 interest in participating in at least one paid leisure activity among a list of 23
- ✓ Have participated in at least one of those paid activities in the past 12 months
- ✓ Participate in planning leisure decisions



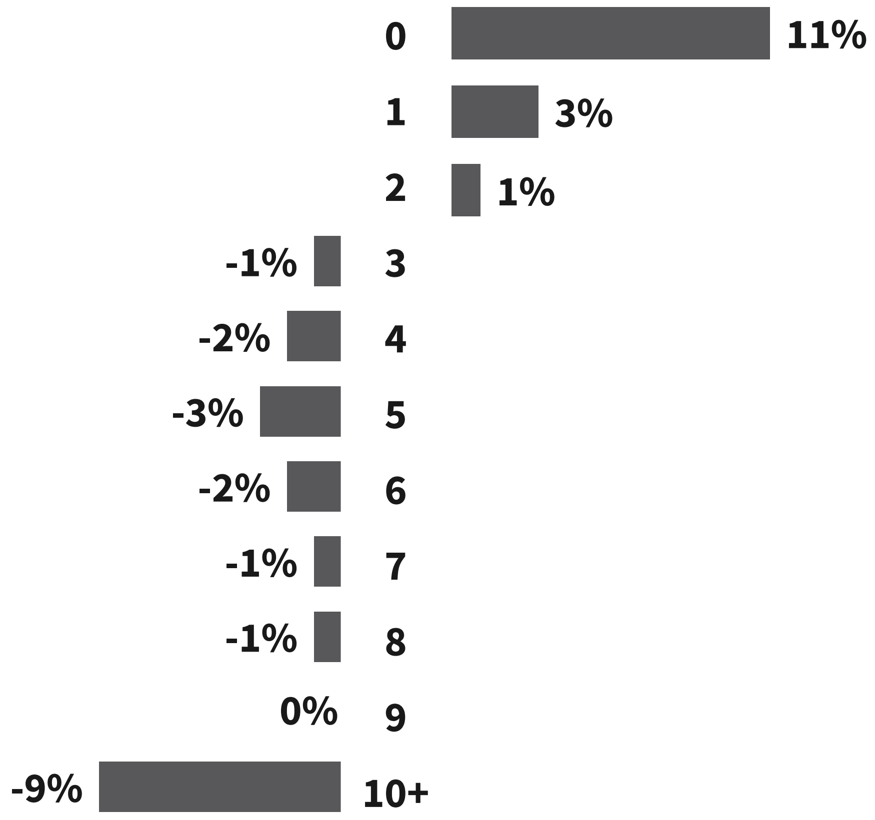
Market Shifting Away From Paid Leisure Experiences

Fewer respondents visited any paid attraction this year, and most cut back on the total number of activities.

HOW MANY PAID LEISURE ACTIVITIES DID YOU DO IN THE LAST 12 MONTHS?

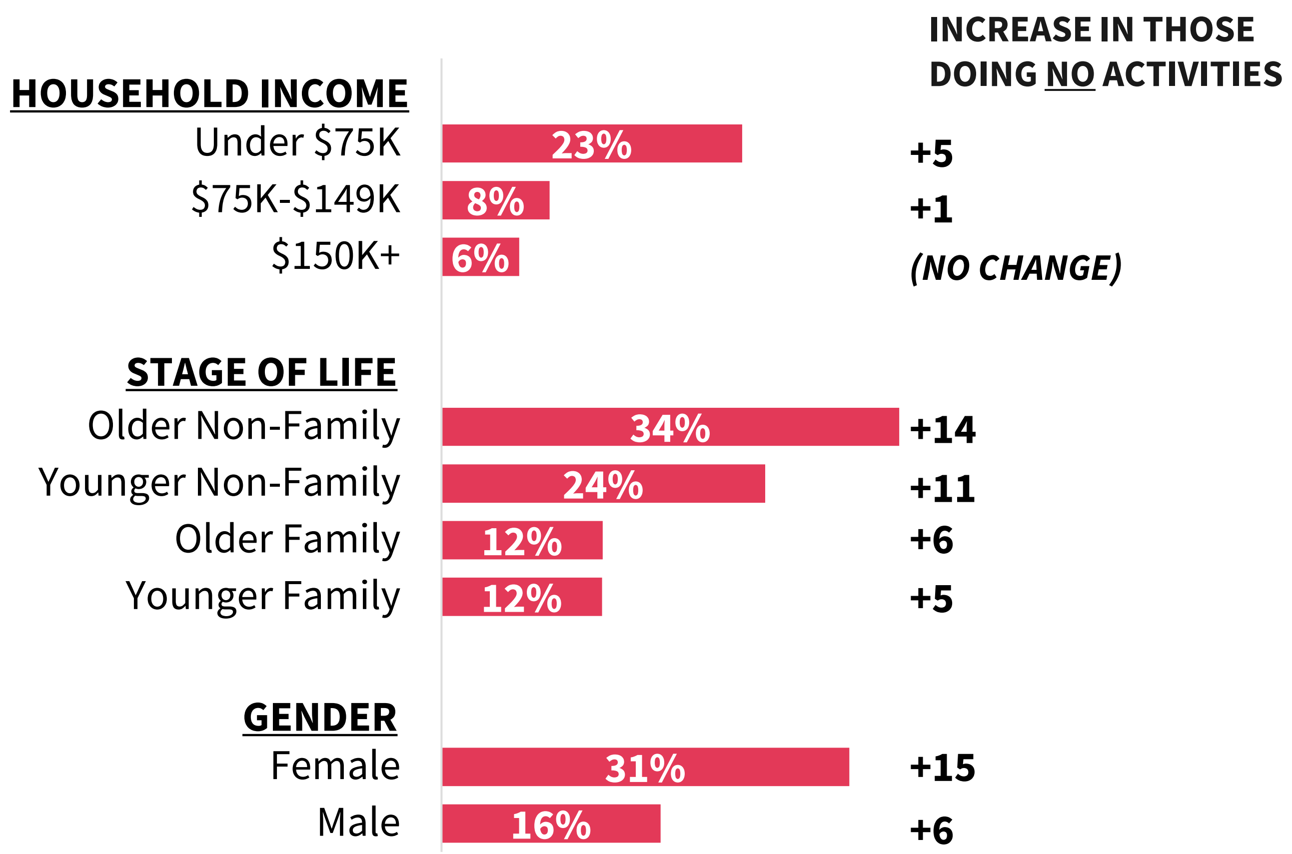


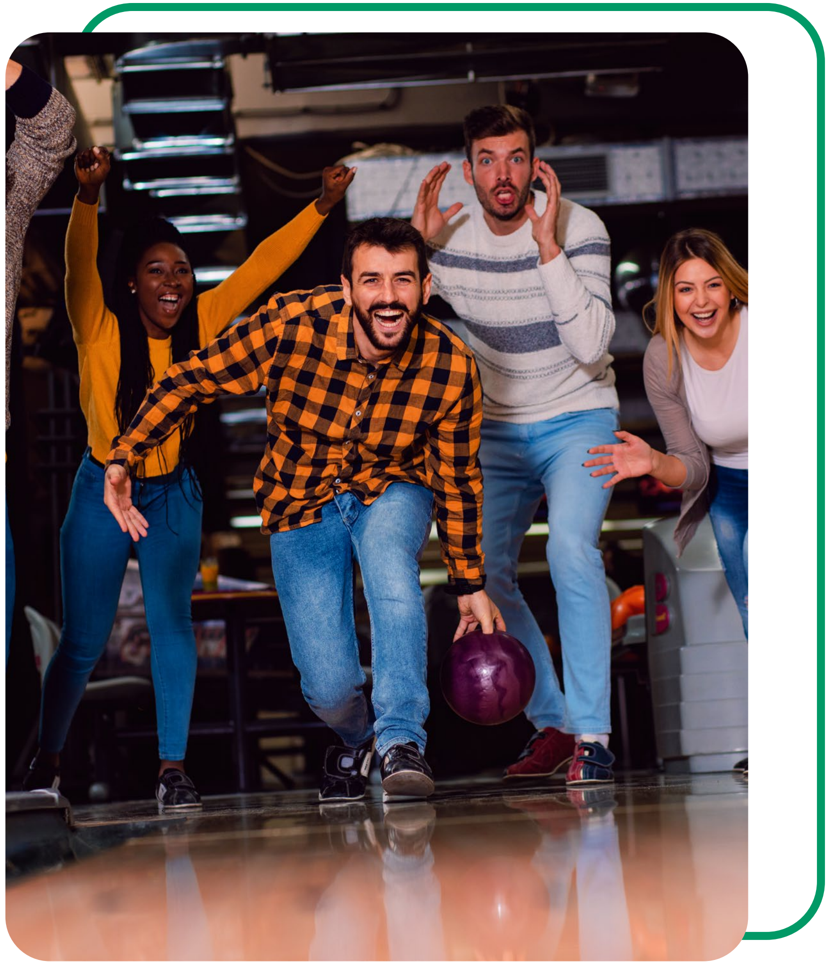
SHIFT IN NUMBER OF PAID LEISURE ACTIVITIES 2025 VS 2026



Fallout Most Substantial Among Lower Income HH, Those Without Children, And Women

NO PAID LEISURE EXPERIENCES IN PAST 12 MONTHS



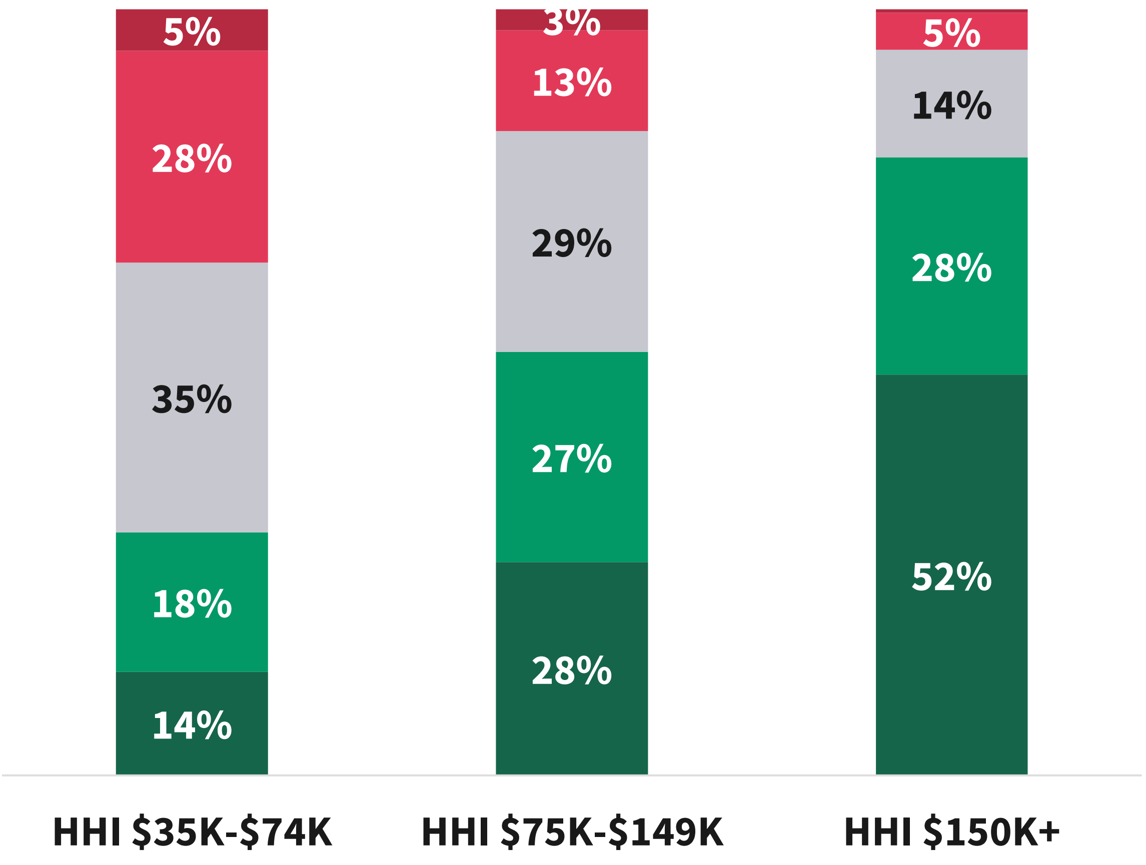


The "K" Shaped Economy Becomes More Pronounced

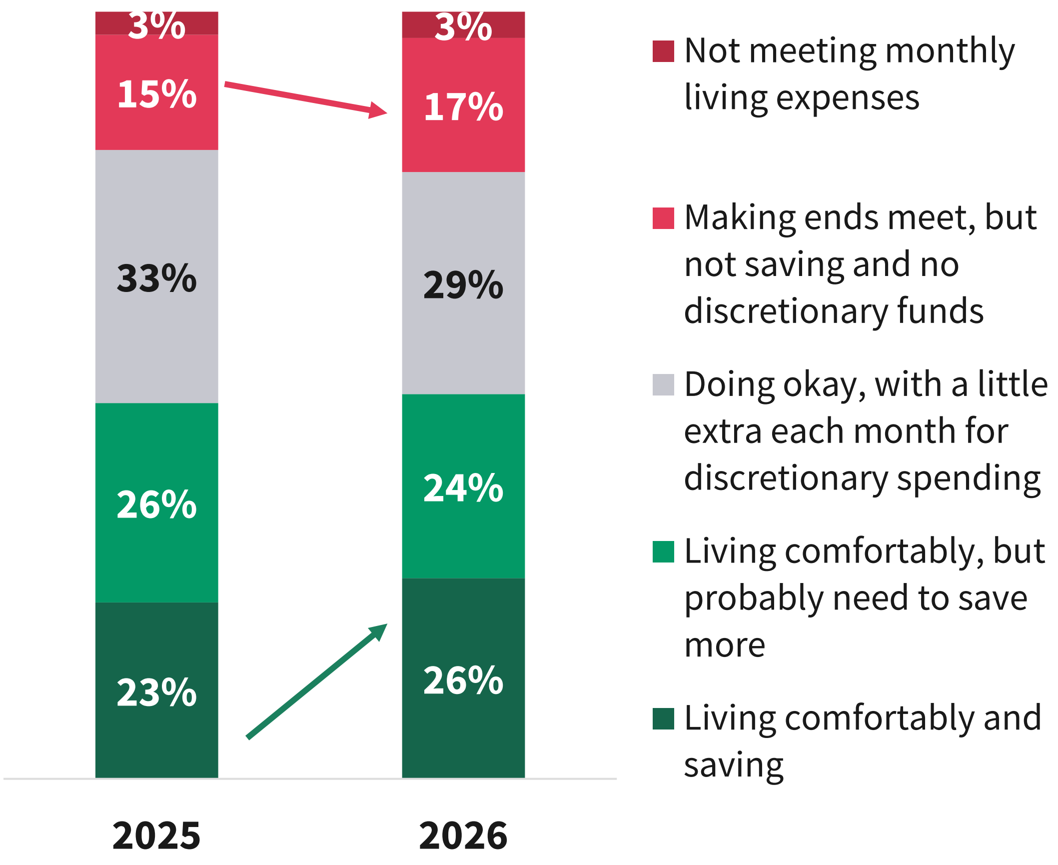
More households are living without any discretionary funds, while those living comfortably are becoming more secure.

Lower income households are most at risk.

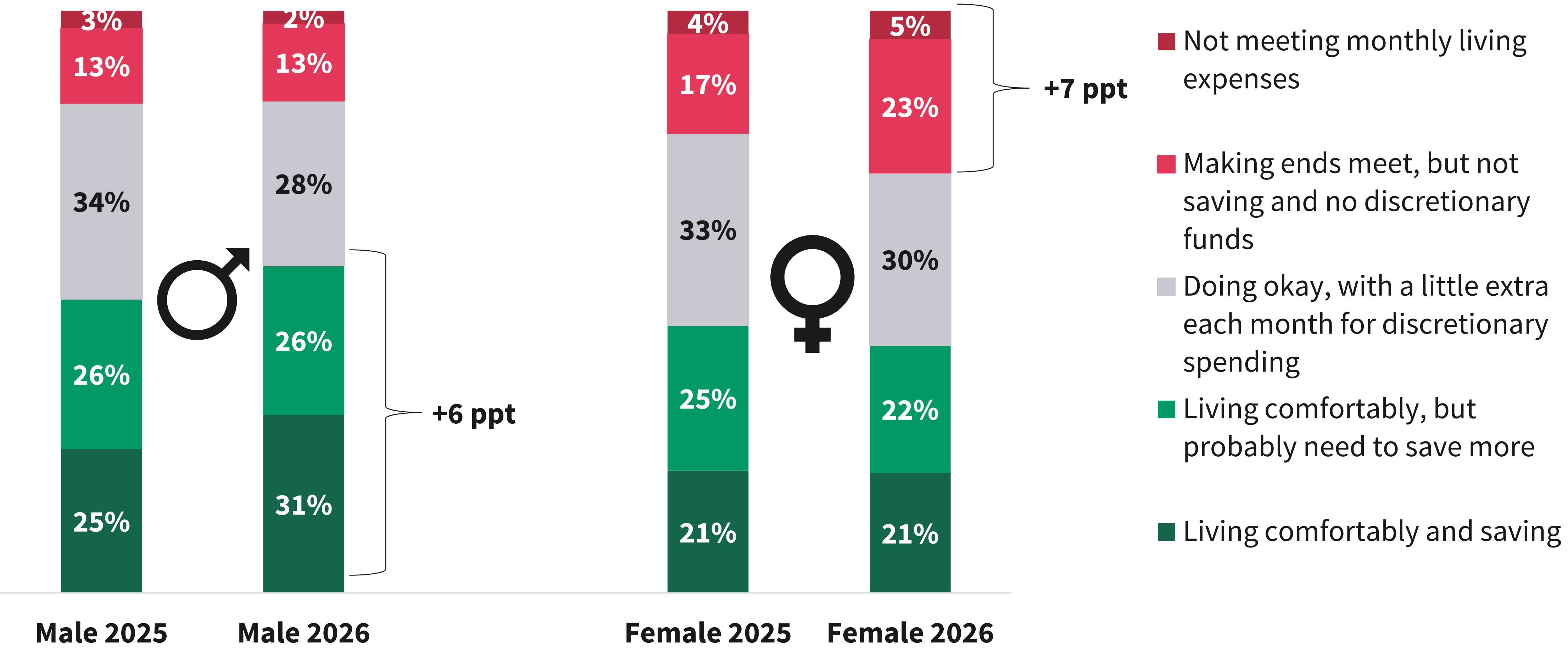
2026 BY INCOME BRACKET



HOUSEHOLD'S CURRENT FINANCIAL SITUATION



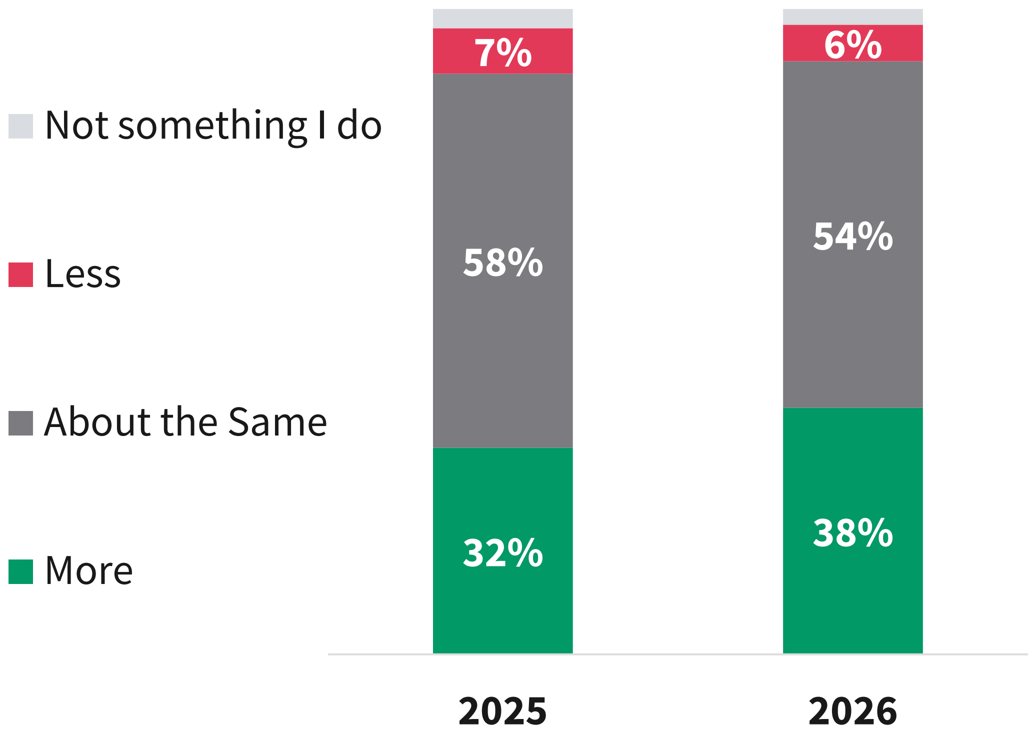
Men Feeling Better About Finances; Women Becoming More Pessimistic



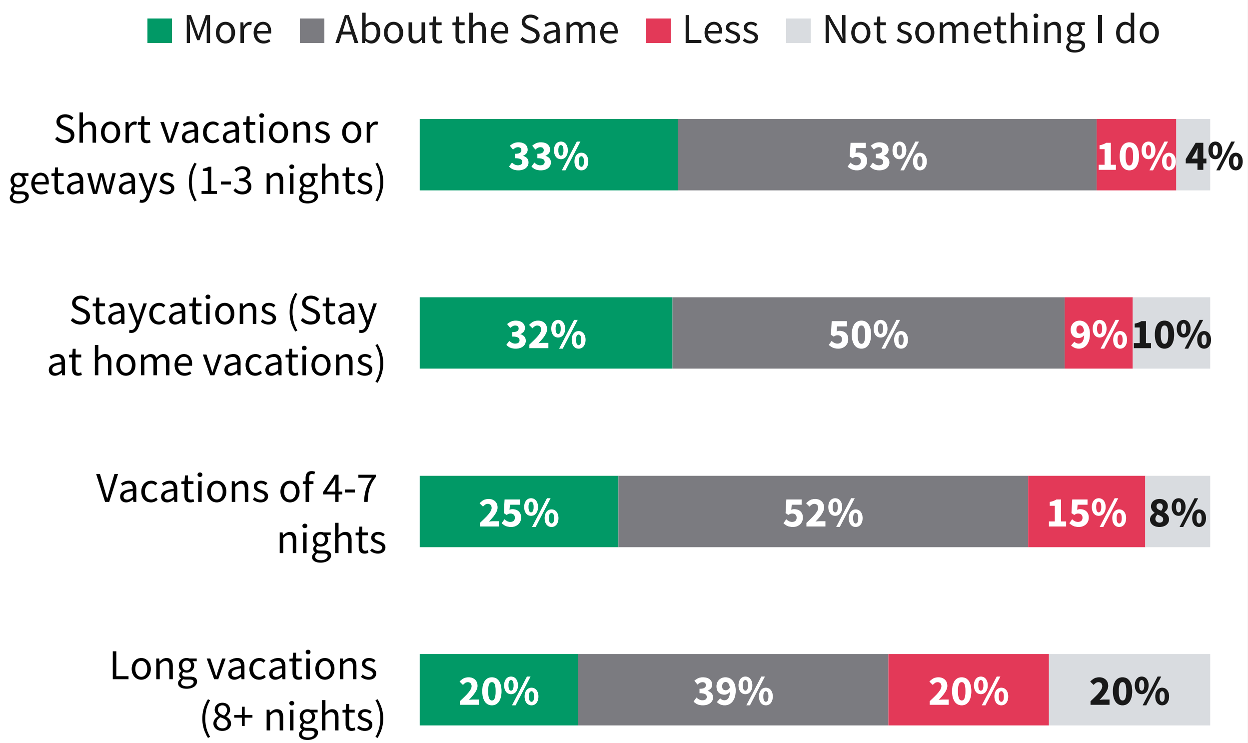
Staycations On The Rise

Intent to do more staycations jumped 7 ppts from 2025. All other vacation intent remained relatively the same. Local attractions and activities will be the beneficiary of more staycations.

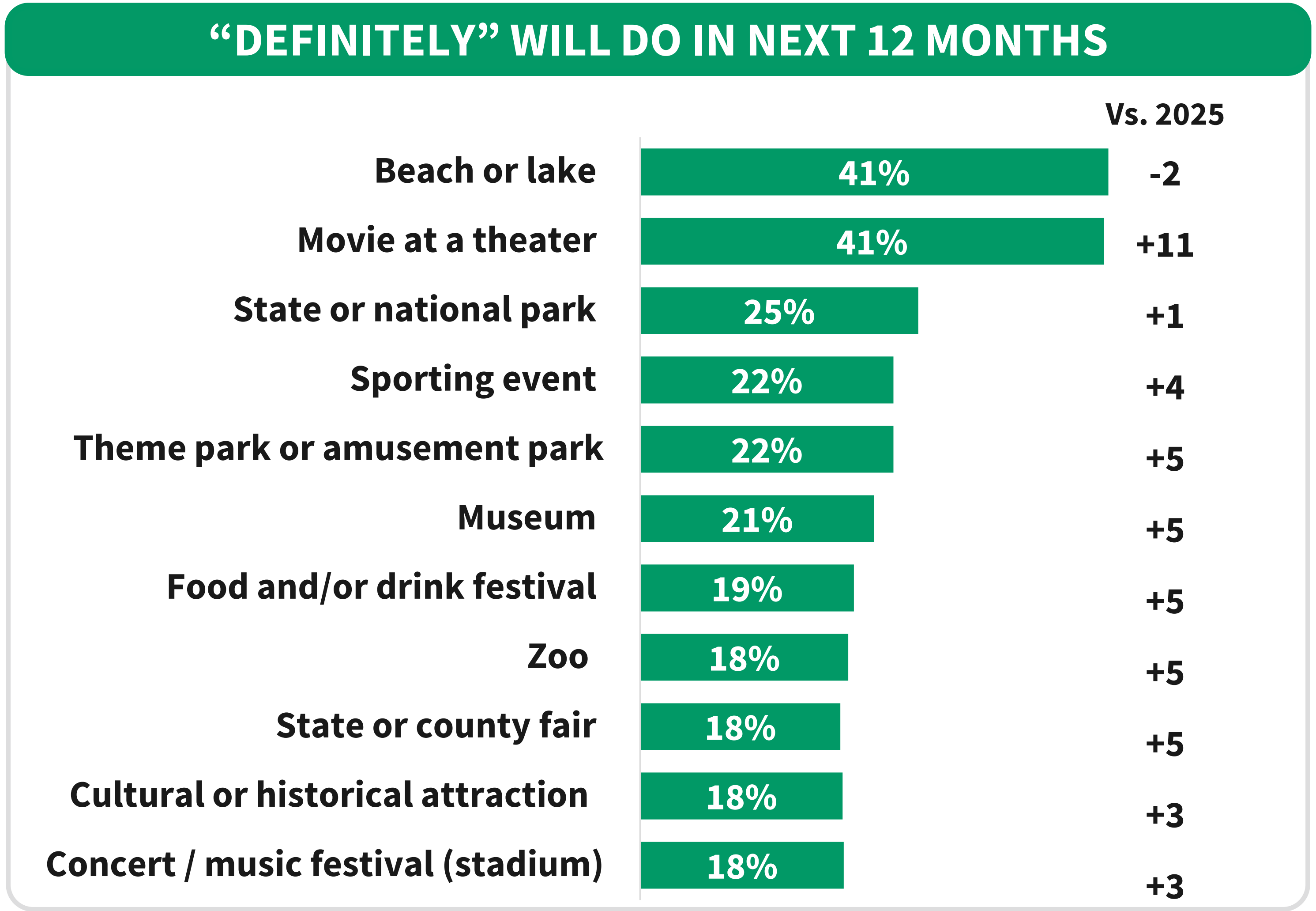
WILL YOU DO MORE LOCAL ACTIVITIES?



WILL YOU TAKE MORE VACATIONS IN THE NEXT 12 MONTHS?



Free / Low-cost Options Showing Strongest Intent…

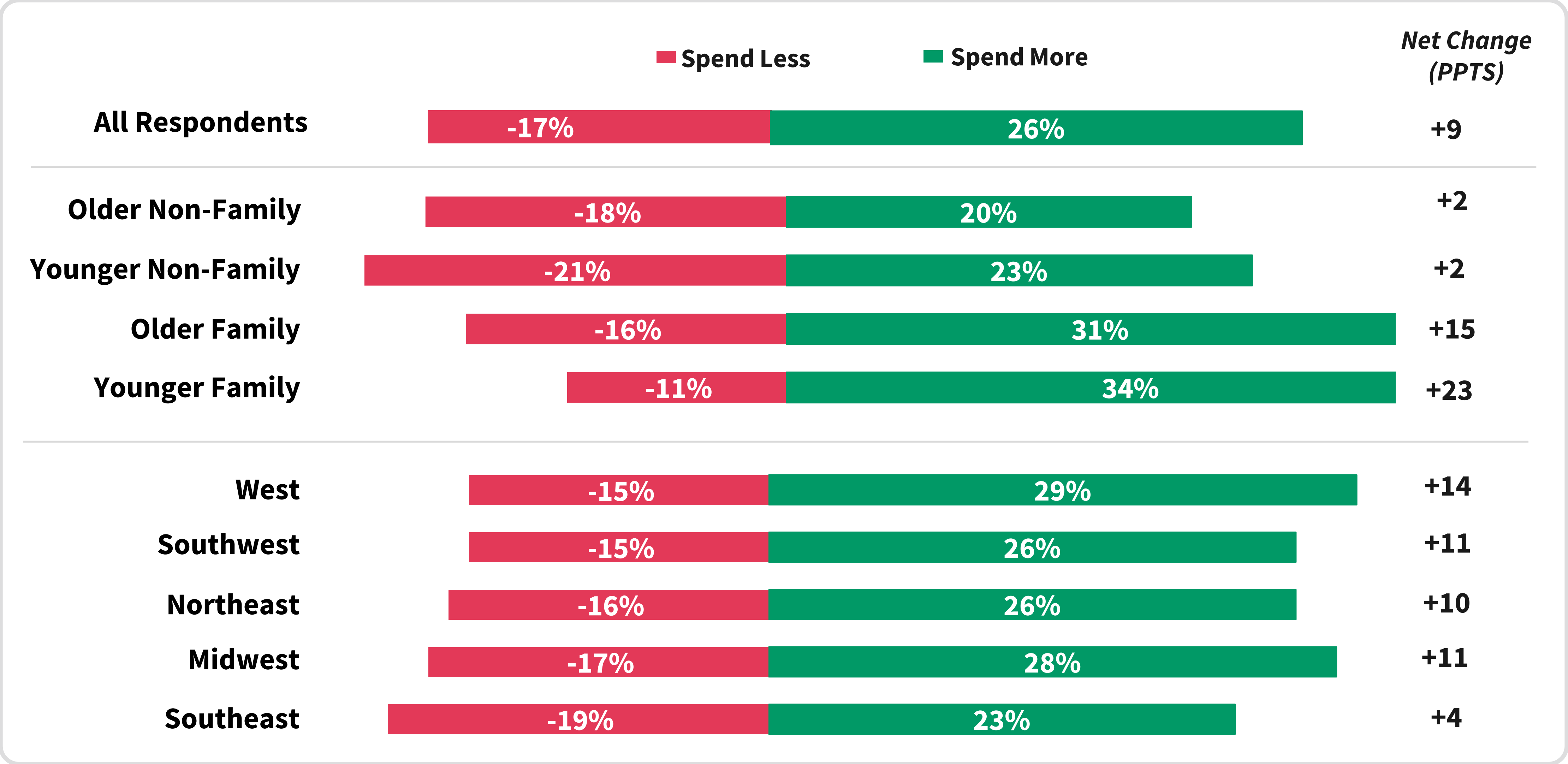


… But More Will Do Paid Attractions Vs Last Year

“DEFINITELY” WILL DO IN NEXT 12 MONTHS

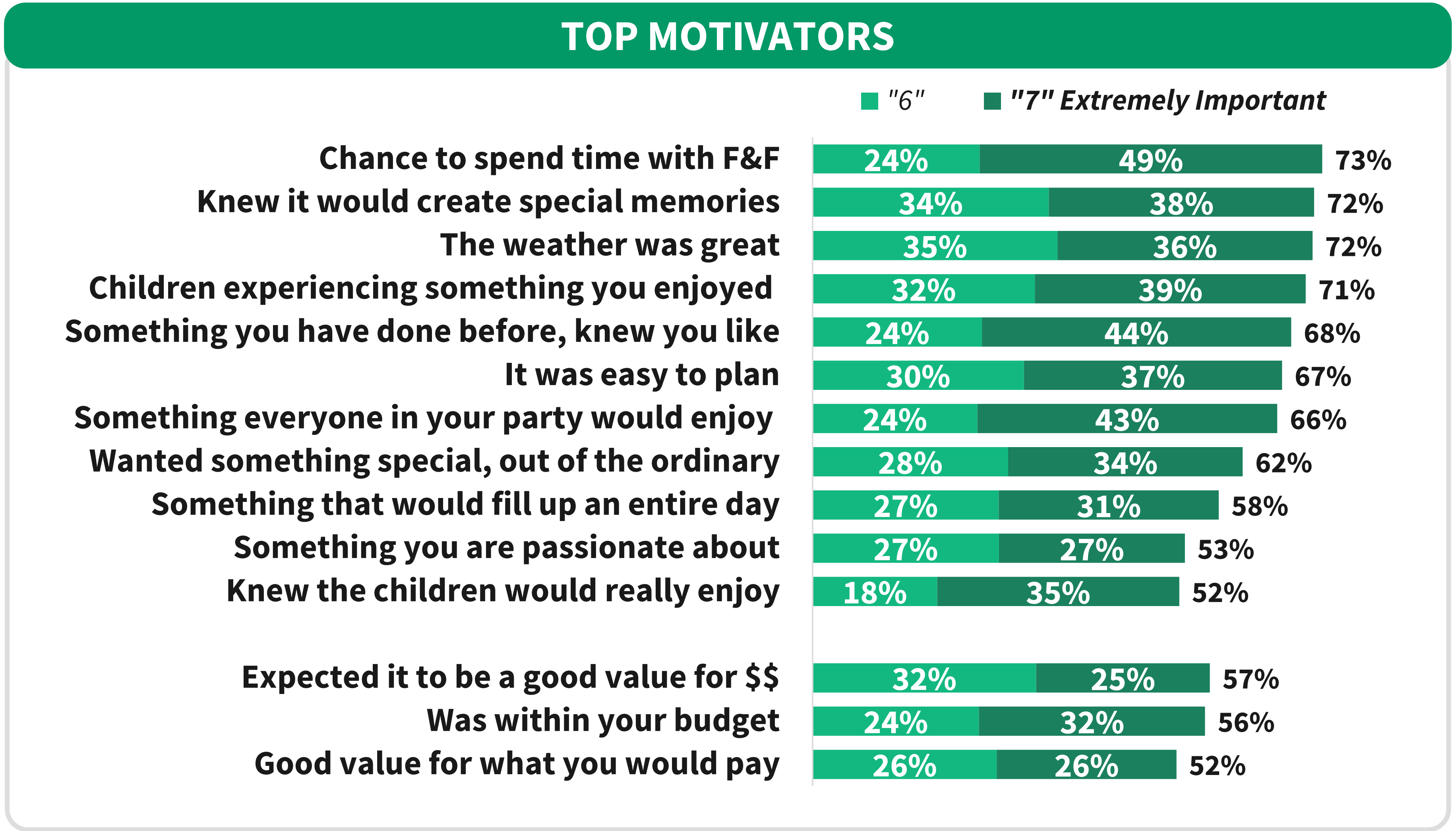
		Vs. 2025
Musical event (smaller venue)	16%	+2
Sports/adventure attraction	15%	+7
Gaming center/arcade	15%	+5
Outdoor water park	15%	+5
Aquarium	14%	+5
Theatrical performance	13%	+3
Arts and/or crafts festival	13%	+3
Indoor water park	12%	+6
Permanent immersive experience	10%	+6
Science center	10%	+4
Escape room	9%	+4
Pop-up immersive experience	8%	+5

Most Expect To Spend More On Out-of-home Entertainment



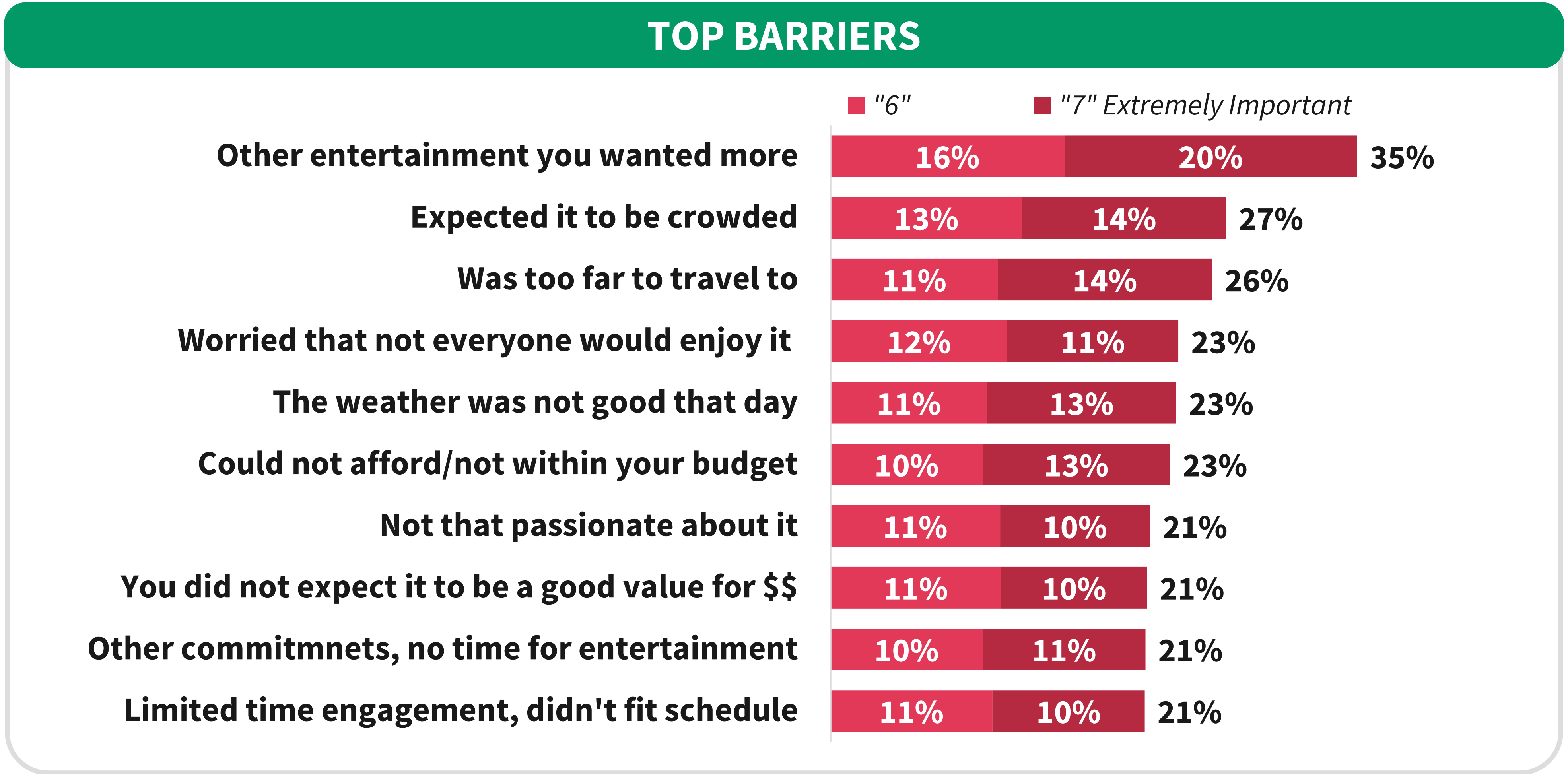
Intangible Factors Drive Decision To Visit Paid Attractions

Spending time with family and friends and making memories are key motivations.



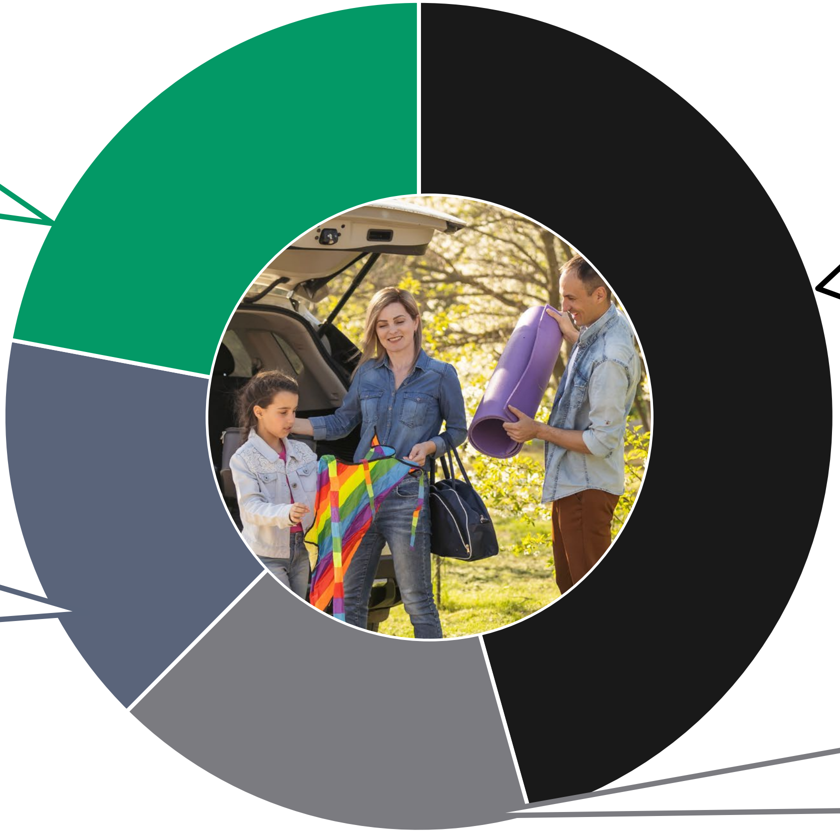
Competition Is The Largest Barrier

Price, affordability and value for price paid, as well as not having a discount, deemed important by about one in five.



Most Evaluate The Total Cost For The Whole Party Before Deciding

If we really want to do it, **we do not worry about cost.** **22%**



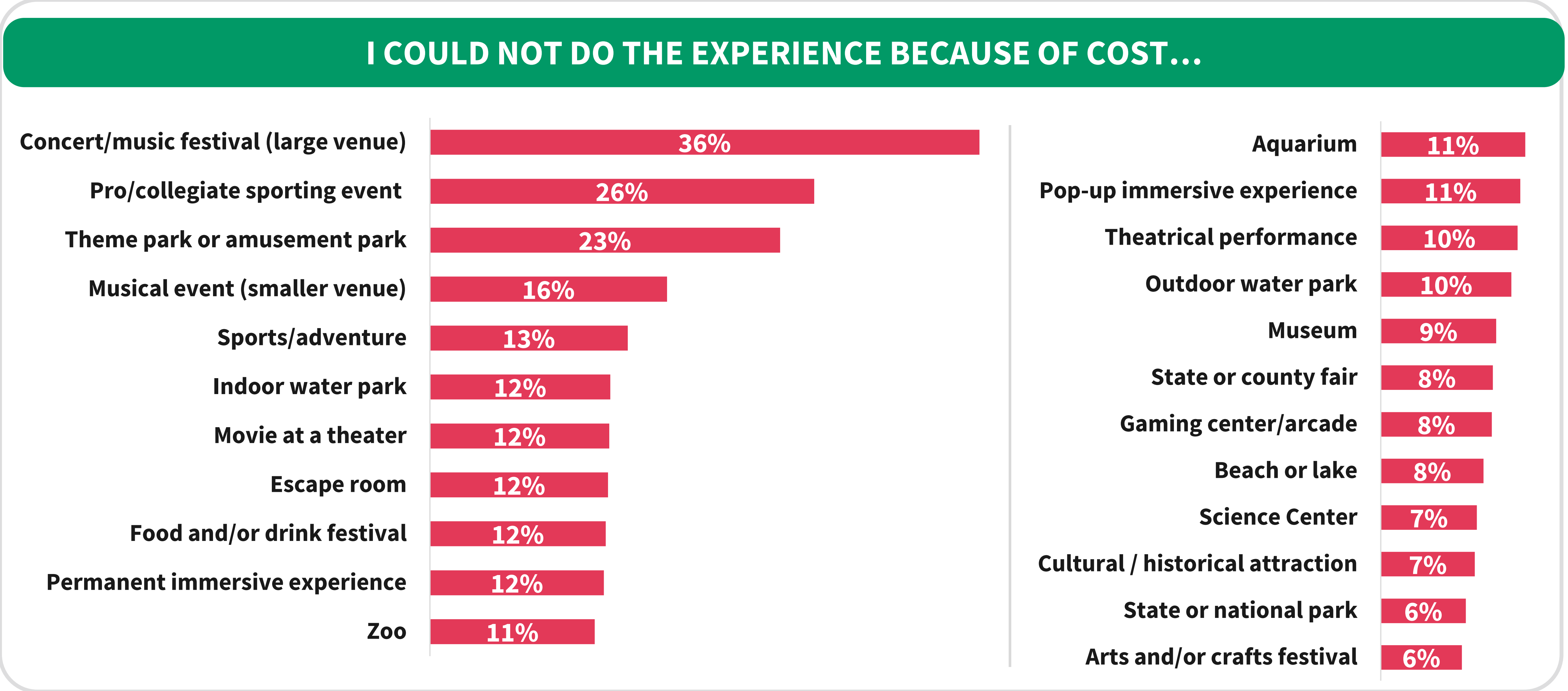
46% I add up the total cost for everyone, including **admission, add on experiences, F&B, Parking** and **Transportation**.

I look up the cost **per person.** **16%**

17% I add up the total cost for everyone, focusing on **admission** and **add-on experiences**.

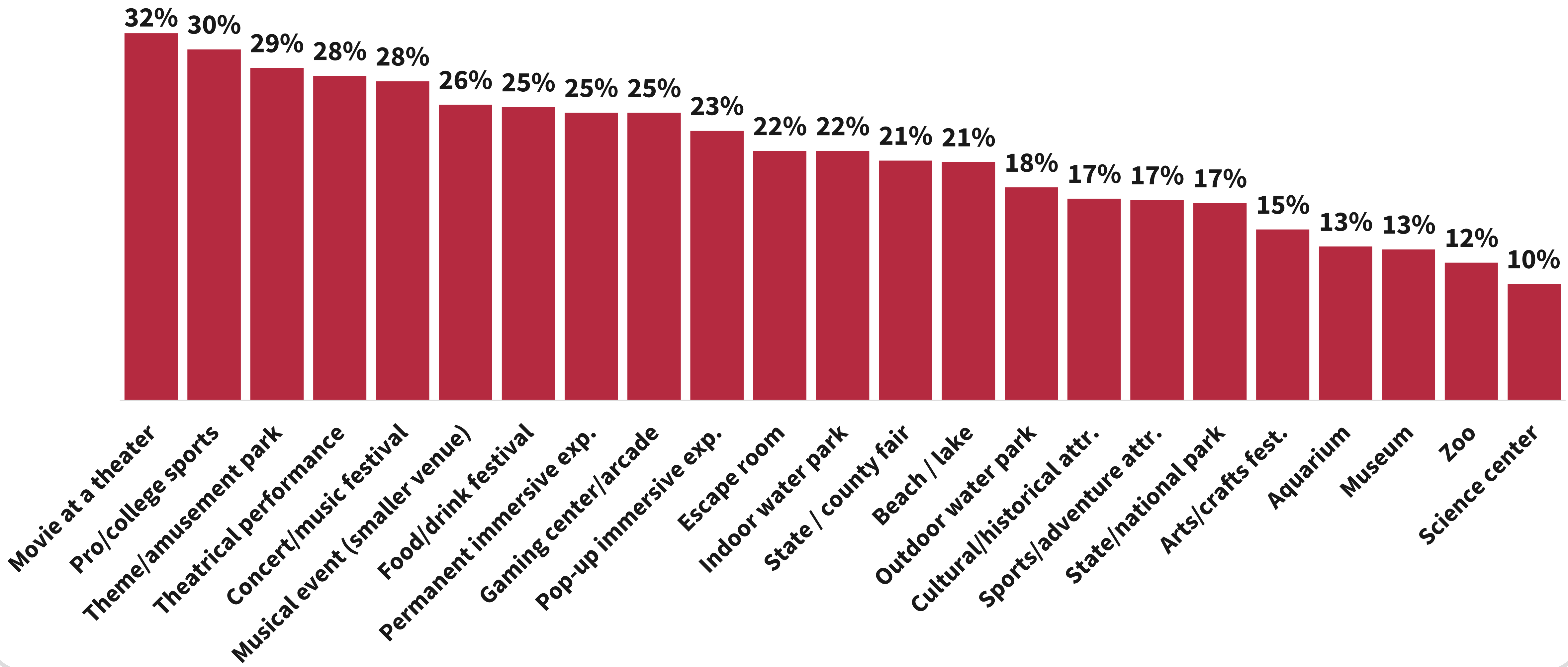
Price Is a Barrier For High-Cost Experiences

Half chose not to do an activity **due to costs.**

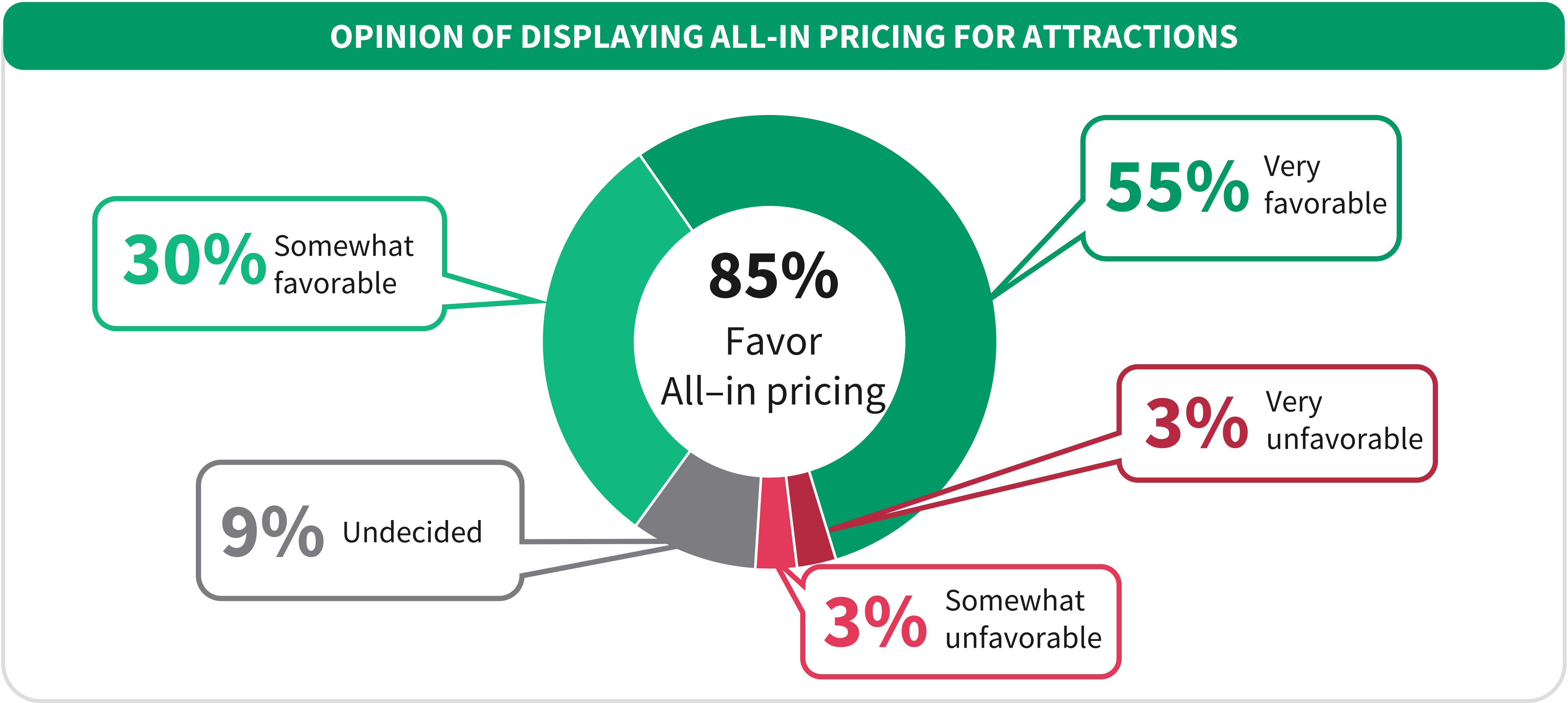


Where Value Fails To Justify Cost

I SKIPPED AN EXPERIENCE BECAUSE THE VALUE FOR PRICE WAS NOT STRONG



Leisure Guests Prefer To Know The Total Cost Up Front …

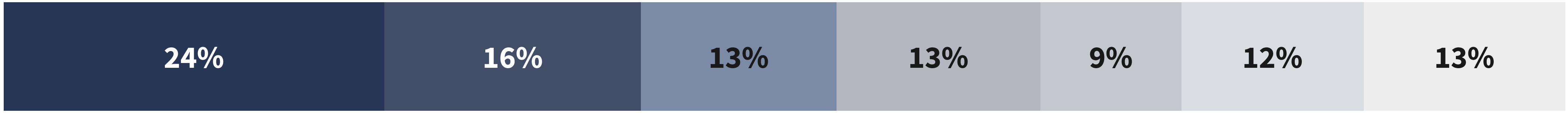


… But Expect To See A Breakdown Of Fees At Some Point

And some will balk at unexpected fees

I like to **see a breakdown of ticket prices**, fees, etc. when making a purchase

I am only **interested in the total purchase price** when buying tickets

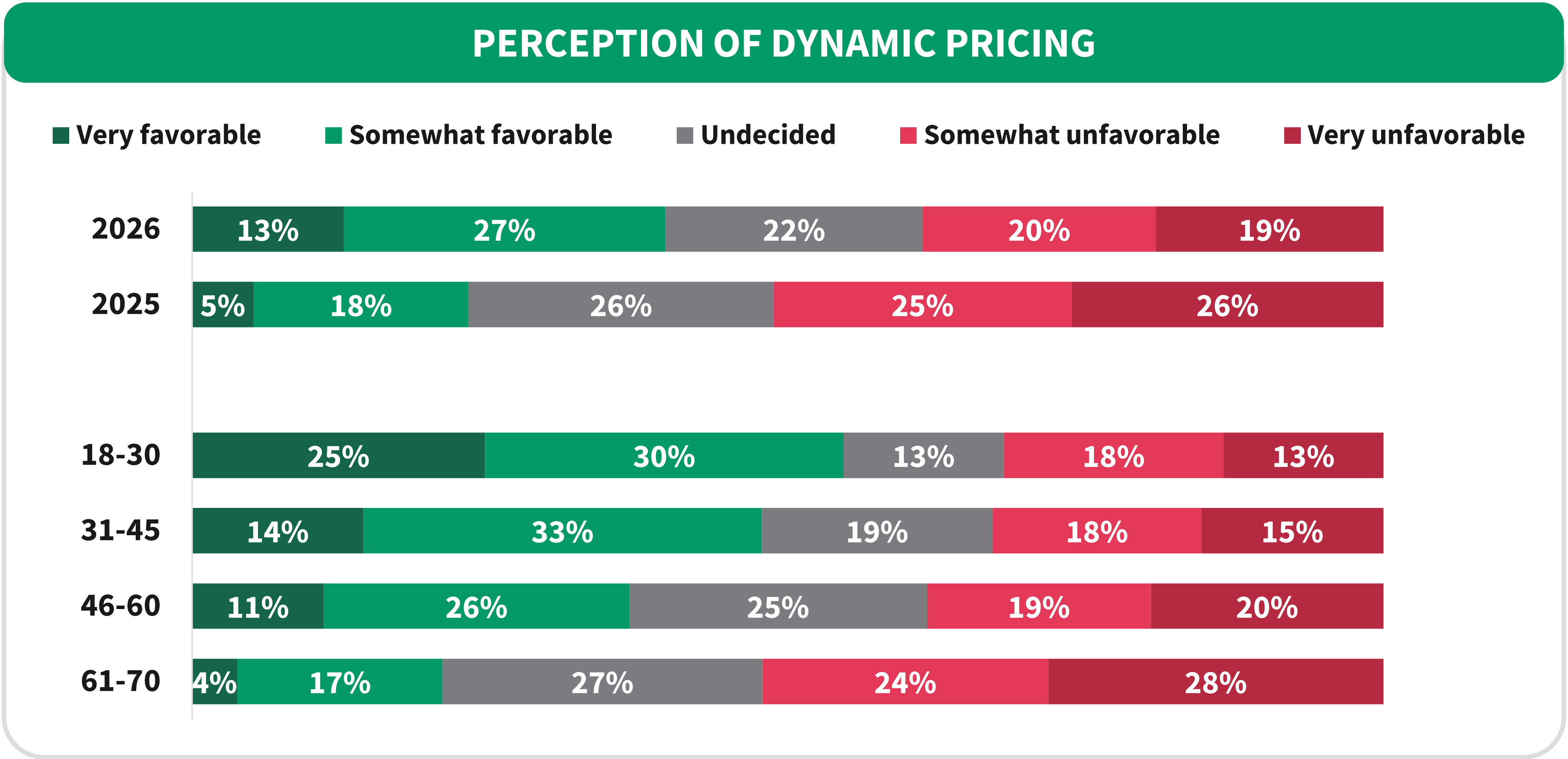


If I see **unexpected fees, I will buy somewhere else or not at all**

I do not worry about fees, so long as the ticket price is what I expected

Acceptance Of Dynamic Pricing Gaining Traction

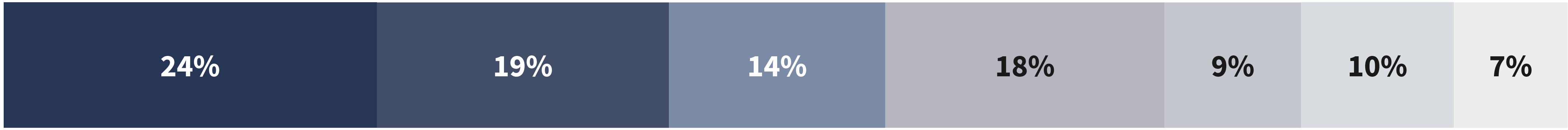
CAUTION! Attractions visitors expect *at least* a **15%** discount to visit on a less desirable day or time.



Most Prefer To Buy Direct From The Attraction, And Often Visit The Website Multiple Times

I buy **direct from the venue** to ensure the ticket is valid

I buy from **discount sellers** to get the best price



I **visit a website a couple of times** before purchasing tickets

I **purchase the first time I am on a website**, provided I know the venue and like the price

In Conclusion …

- Paid attraction participation is **shrinking overall,** driven by reduced per-capita activity and a widening economic divide
  - Hardest-hit are **households under $75K HHI, women**, and **households without children**
- Expect **intense competition** from direct competitors and **low-cost or free alternatives**
- Focus marketing, pricing and product development on those still engaged (shifting towards higher income, men, and families with children)
  - Align messaging with **emotional drivers** by emphasizing intangible benefits like family time, connection, memory-making, and unplugged, off-screen time
- To **reduce pricing friction** …
  - If executing variable / dynamic pricing strategies or promotions, employ **meaningful discounts** (15% or more) to avoid diluting revenue
  - Use **percentage-off messaging** over flat dollar discounts for higher conversion
  - Create transparency by framing **total costs** upfront
  - Utilize **"Good, Better, Best"** strategies to offer guests options
  - Develop **bundles** to maximize perceived value and reduce overall cost as a barrier

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THANK YOU!