

Bespoke Survey Research

August 2023

Theme Parks and Cruises

Volume 3 | Quarterly Survey

1,250+ US Consumers Balanced To Census

Tickers Covered: DIS, SIX, FUN, SEAS.

KPIs and Key questions

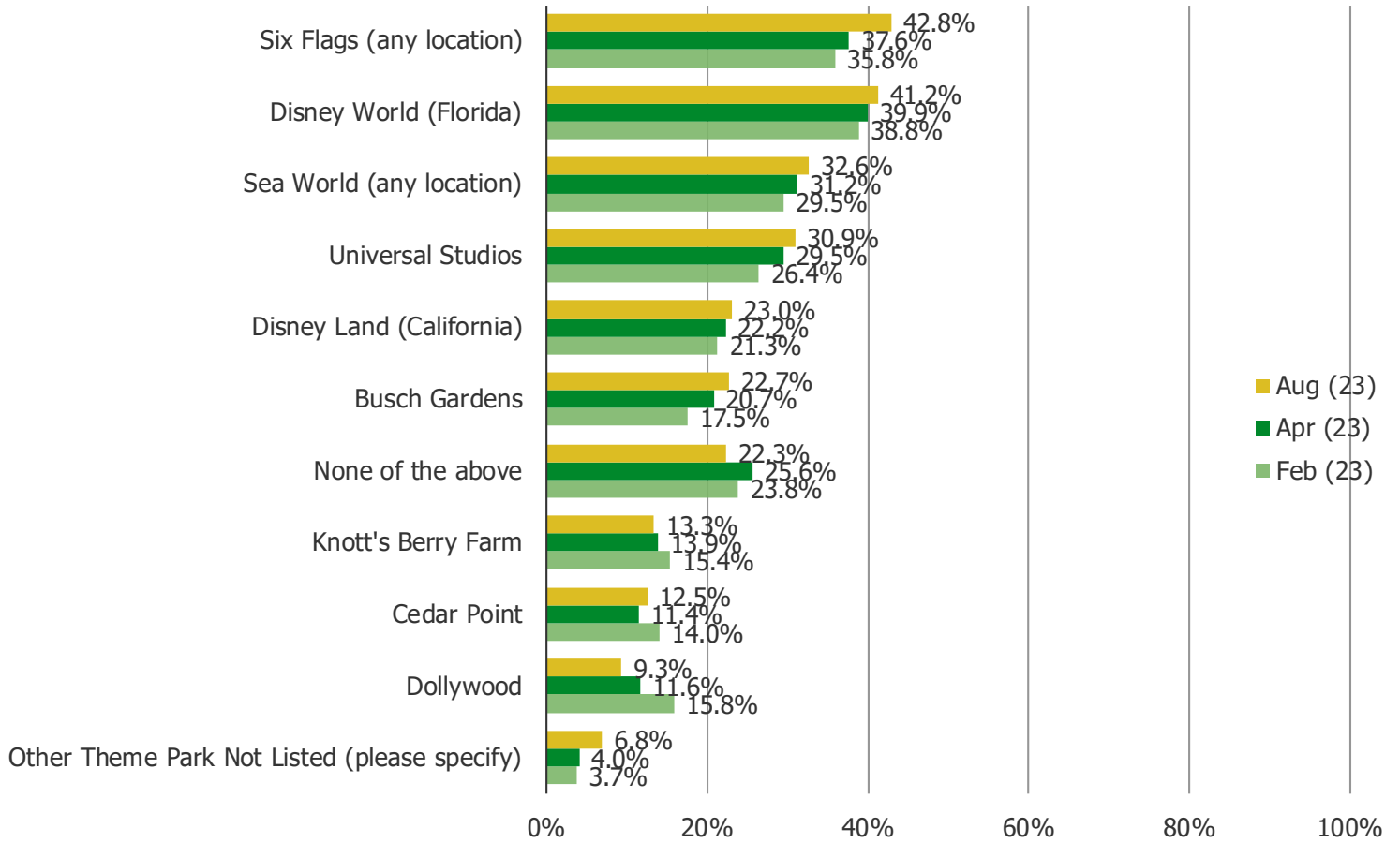
1. The share of consumers who have ever visited theme parks like Six Flags, Disney, Sea World, Universal, etc, has increased over time.
2. Consumers have a generally positive, but slightly softening, opinion of the theme parks in our survey.
3. Consumers like the in-park experience, but their opinion of pricing and price to value has declined relative to readings earlier in the year.
4. In two separate surveys in which we track expected visits looking forward, the data has softened sequentially (distance and pricing are the primary reasons for not expecting to visit).
5. Consumers associate each theme park primarily with the adjective, "Fun." Some theme parks are more likely to have consumers call out "expensive" as a primary adjective as well (particularly for Disney World and Disney Land).

Noteworthy Stats:

- 21.5%** Of respondents who don't have plans to visit Six Flags say that money/too expensive is the main reason why they will not visit in the next 12 months.
- 43.9%** Of respondents who don't have plans to visit a Disney theme park in the next 12 months say it is because it is too expensive.
- 30.1%** Of respondents who don't have plans to visit a Sea World theme park in the next 12 months say it is because it is too expensive/money.

HAVE YOU EVER VISITED ANY OF THE FOLLOWING THEME PARKS? SELECT ALL THAT APPLY

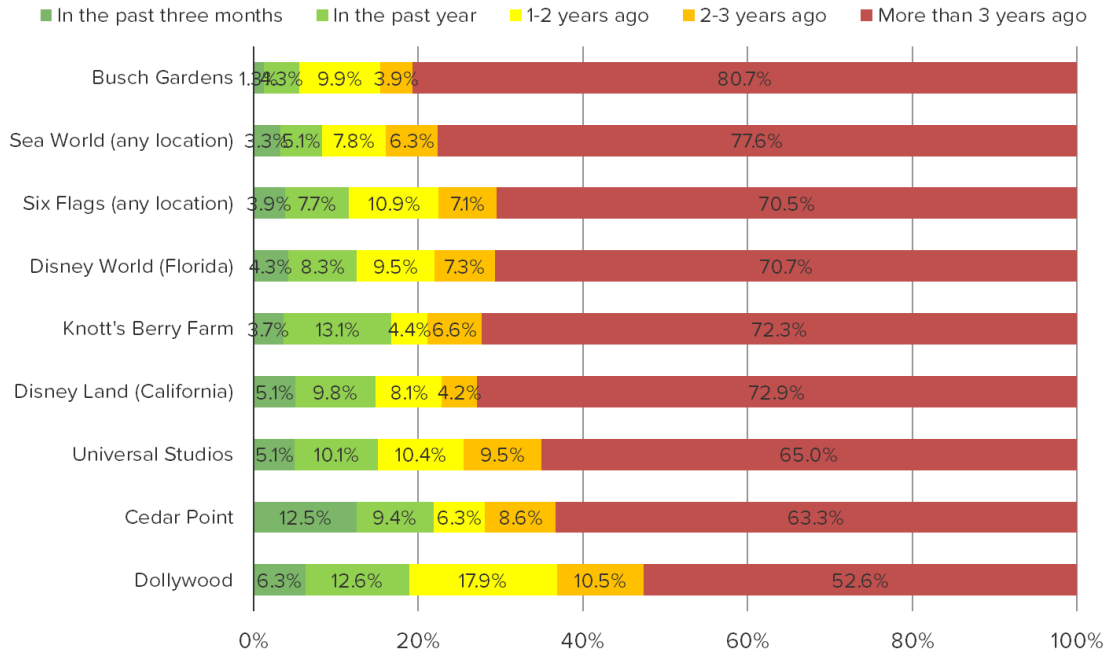
Posed to all respondents.



WHEN DID YOU MOST RECENTLY VISIT THIS THEME PARK?

Posed to all respondents who have visited each of the below.

August 2023

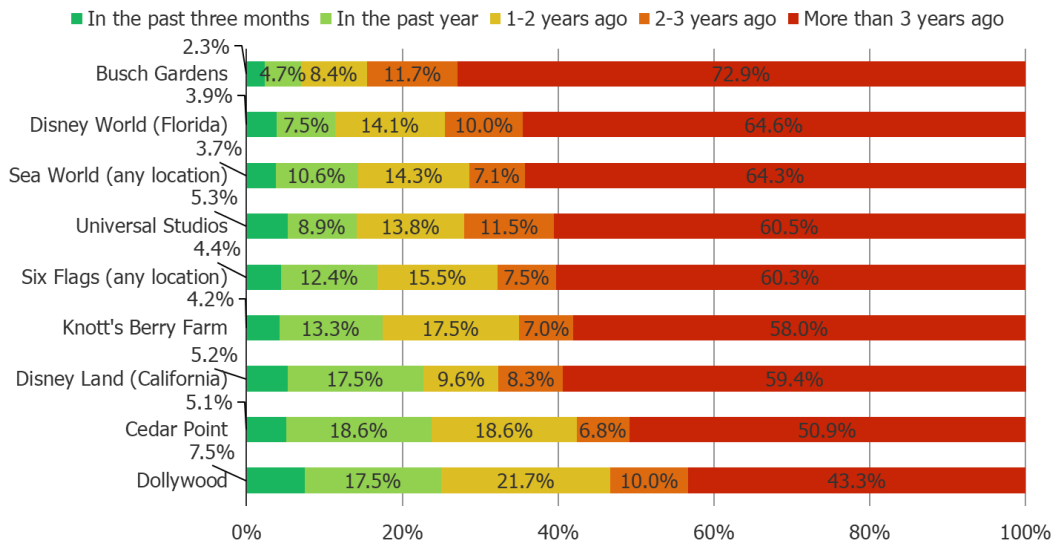


	N=
Dollywood	95
Cedar Point	128
Universal Studios	317
Disney Land (California)	236
Knott's Berry Farm	137
Disney World (Florida)	423
Six Flags (any location)	440
Sea World (any location)	335
Busch Gardens	233

WHEN DID YOU MOST RECENTLY VISIT THIS THEME PARK?

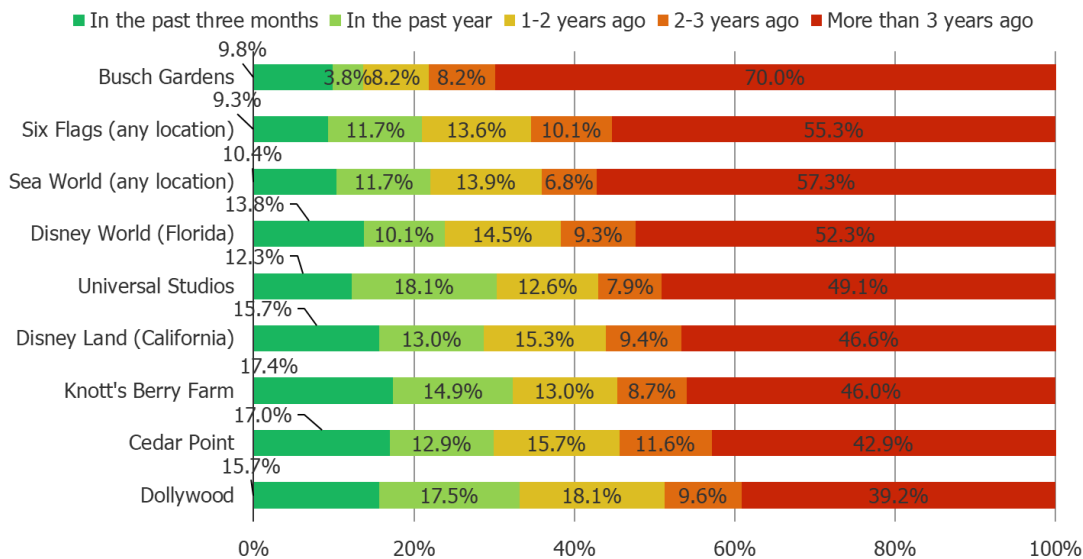
Posed to all respondents who have visited each of the below.

April 2023



	N=
Disney World (Florida)	412
Disney Land (California)	229
Six Flags (any location)	388
Universal Studios	304
Sea World (any location)	322
Cedar Point	118
Knott's Berry Farm	143
Dollywood	120
Busch Gardens	214

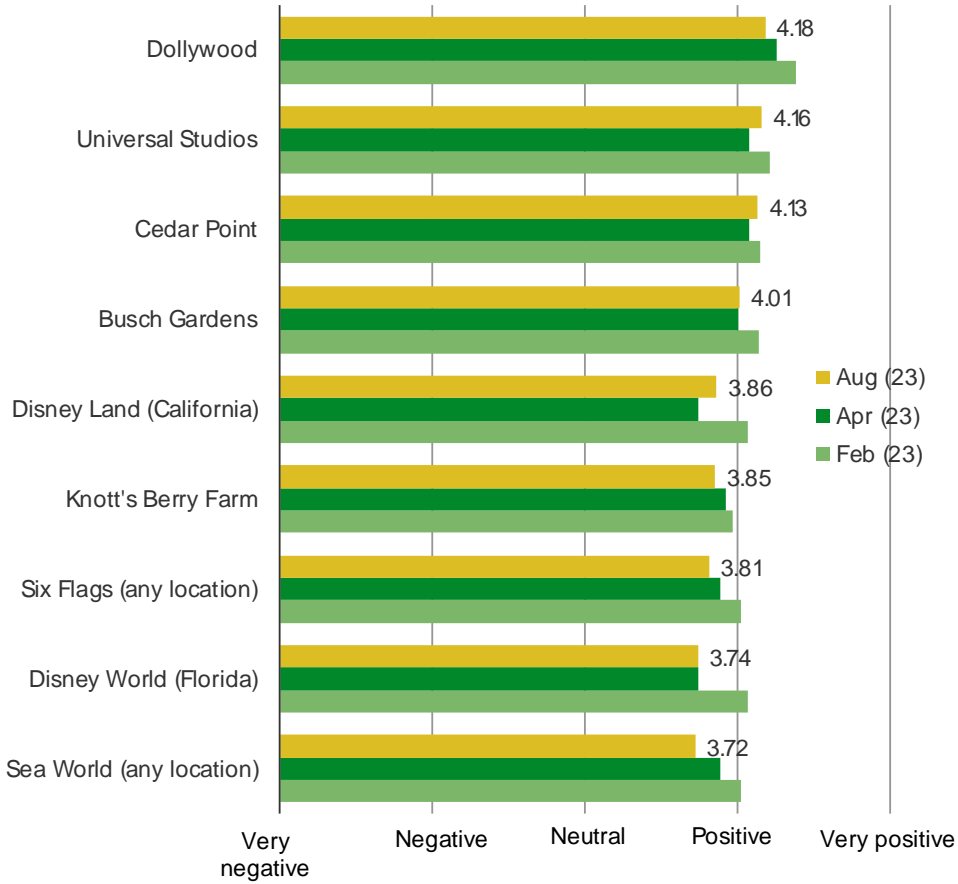
February 2023



	N =
Dollywood	166
Cedar Point	147
Knott's Berry Farm	161
Disney Land (California)	223
Universal Studios	277
Disney World (Florida)	407
Sea World (any location)	309
Six Flags (any location)	376
Busch Gardens	183

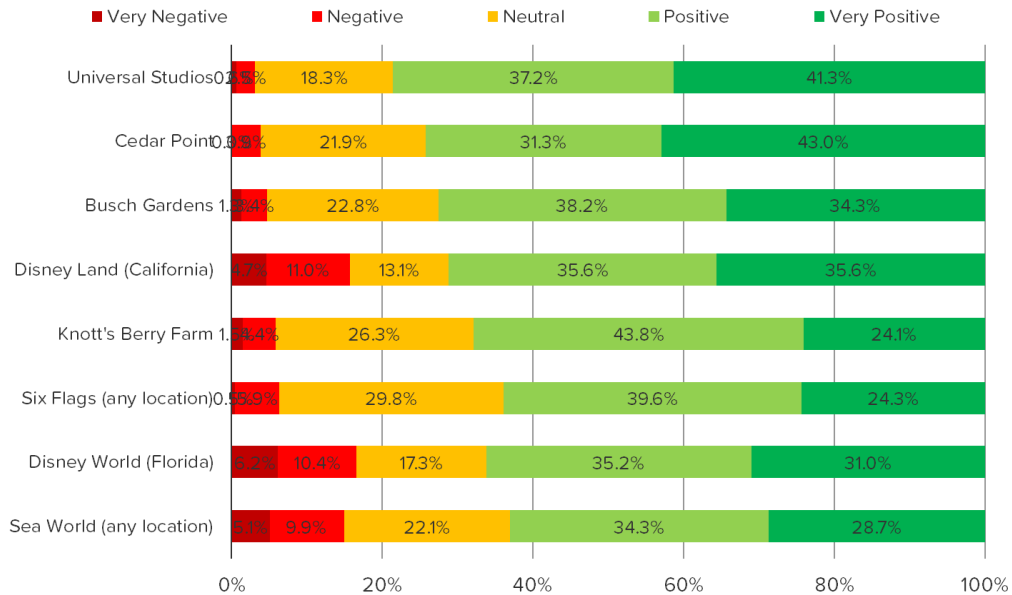
WHAT IS YOUR OPINION OF THE FOLLOWING:

Posed to all respondents who have visited the below.



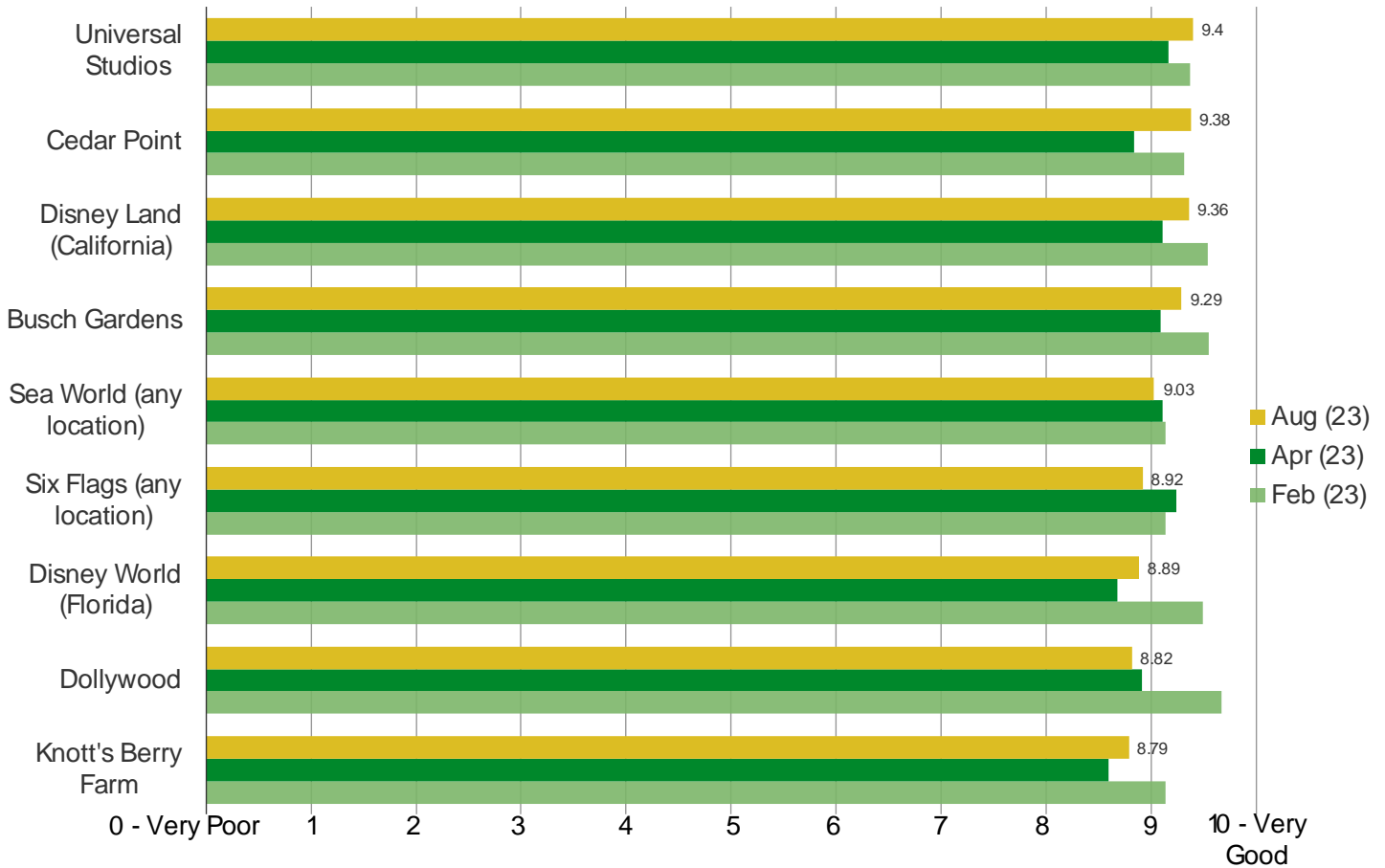
	N=
Sea World (any location)	335
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August 23 Data Breakout



THINKING ABOUT YOUR MOST RECENT VISIT, HOW WOULD YOU RATE THE EXPERIENCE YOU HAD IN THE THEME PARK?

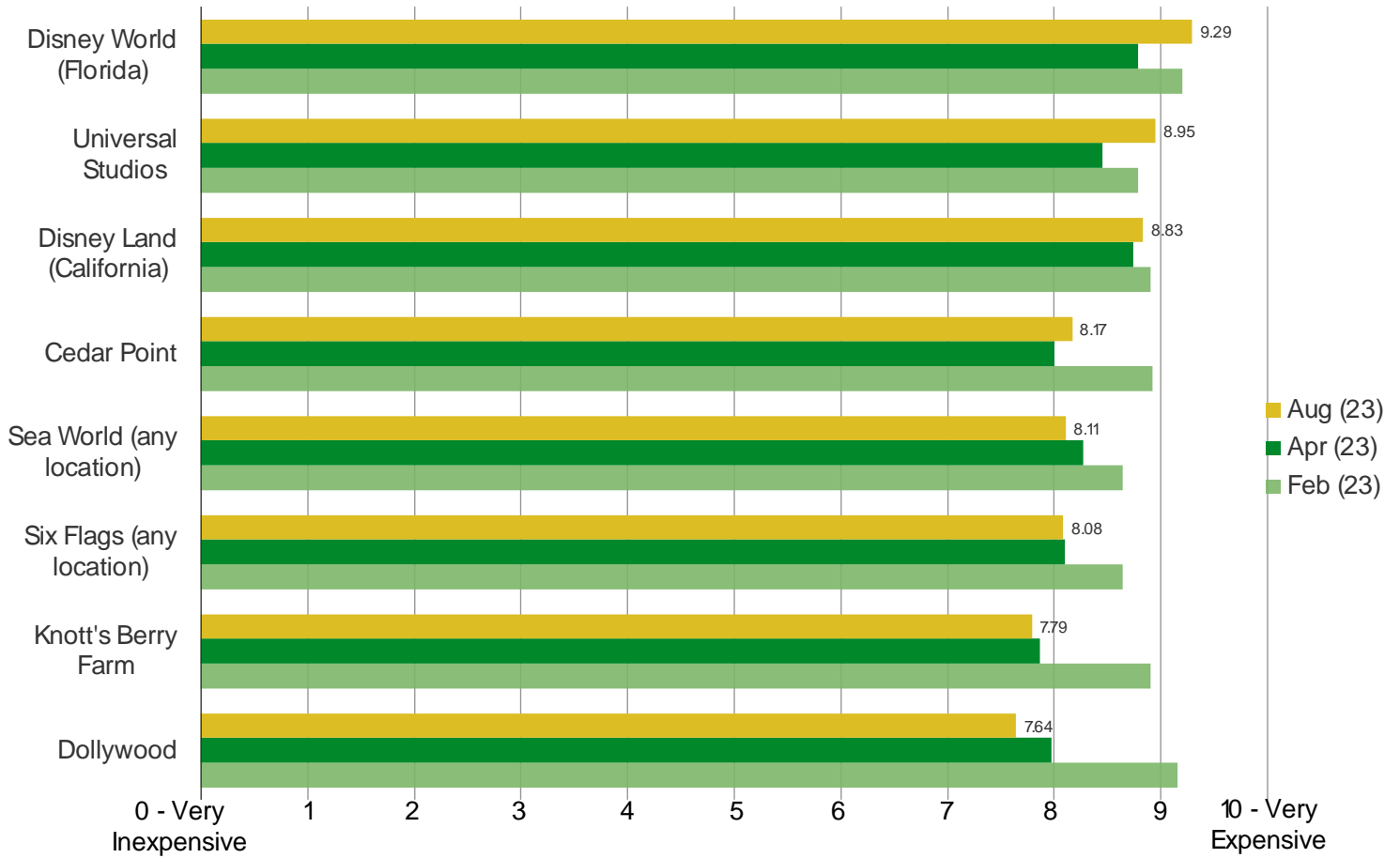
Posed to all respondents who have visited the below most recently in the past three years.



	N=
Disney World (Florida)	124
Disney Land (California)	64
Six Flags (any location)	130
Universal Studios	111
Sea World (any location)	75
Cedar Point	47
Knott's Berry Farm	38
Dollywood	45
Busch Gardens	45

THINKING ABOUT YOUR MOST RECENT VISIT, HOW WOULD YOU RATE THE PRICING OF VISITING THE THEME PARK?

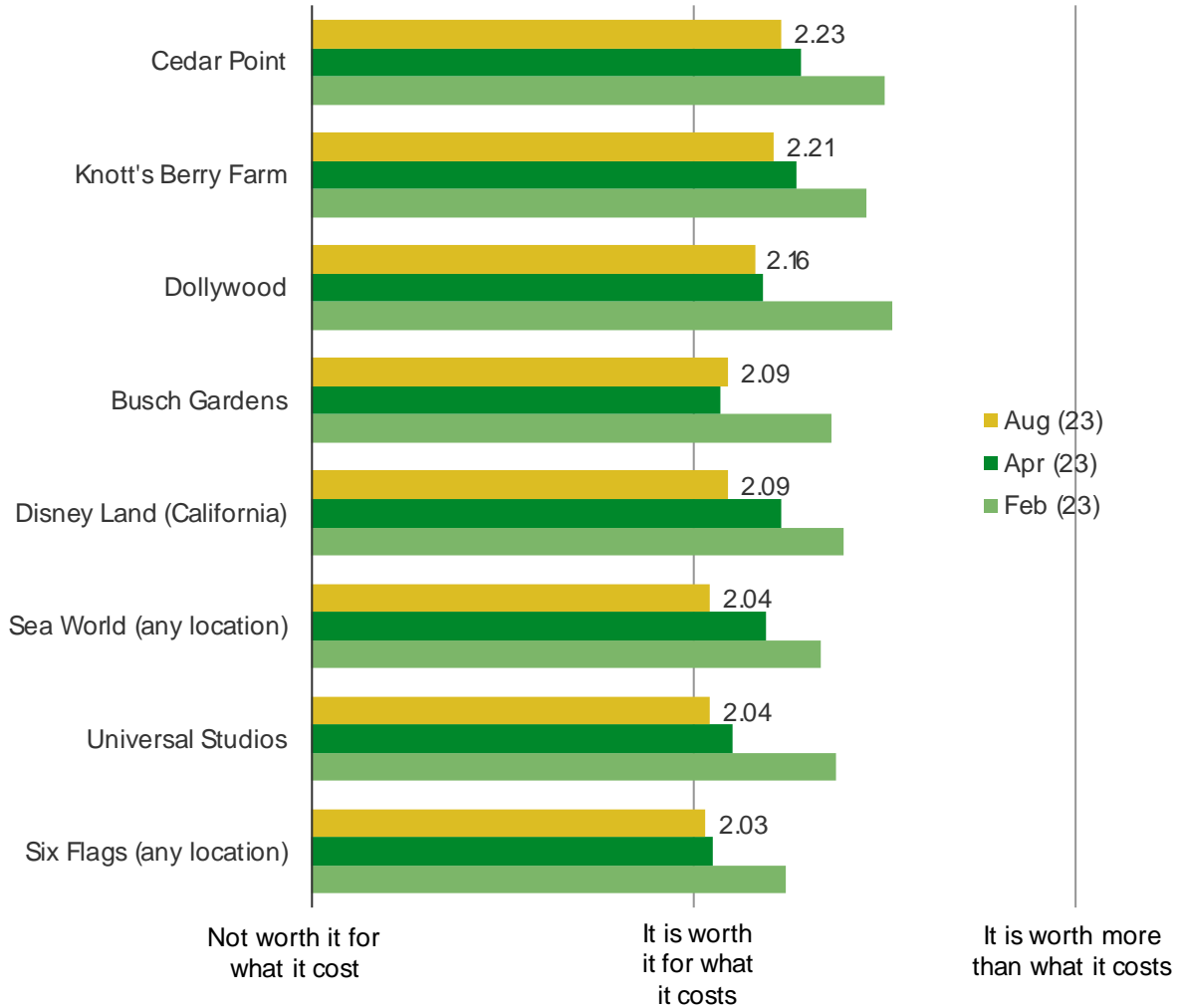
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Busch Gardens	45

IN YOUR OPINION, HOW WORTH IT IS THE EXPERIENCE FOR THE PRICE THAT IT COST TO VISIT THE THEME PARK?

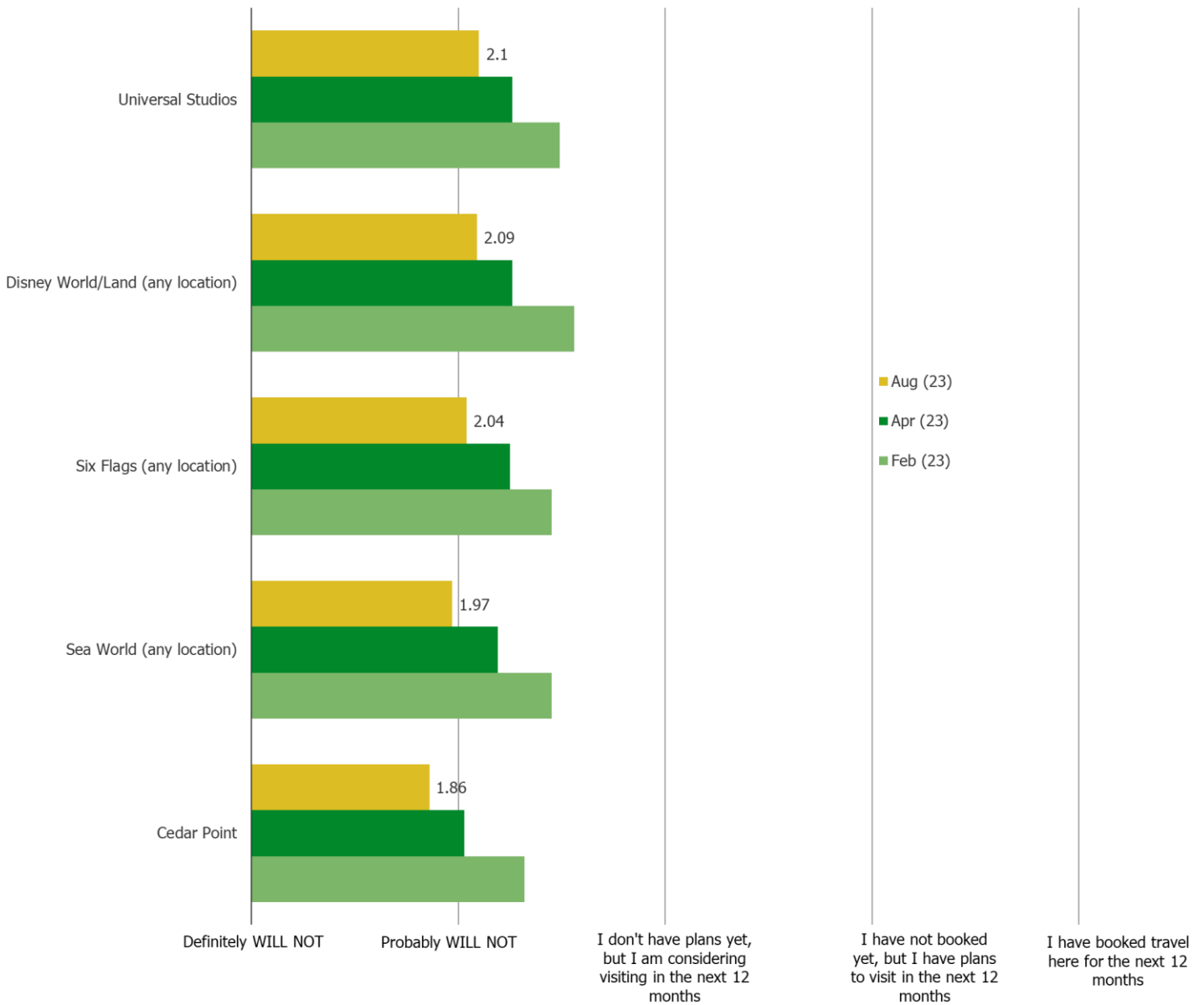
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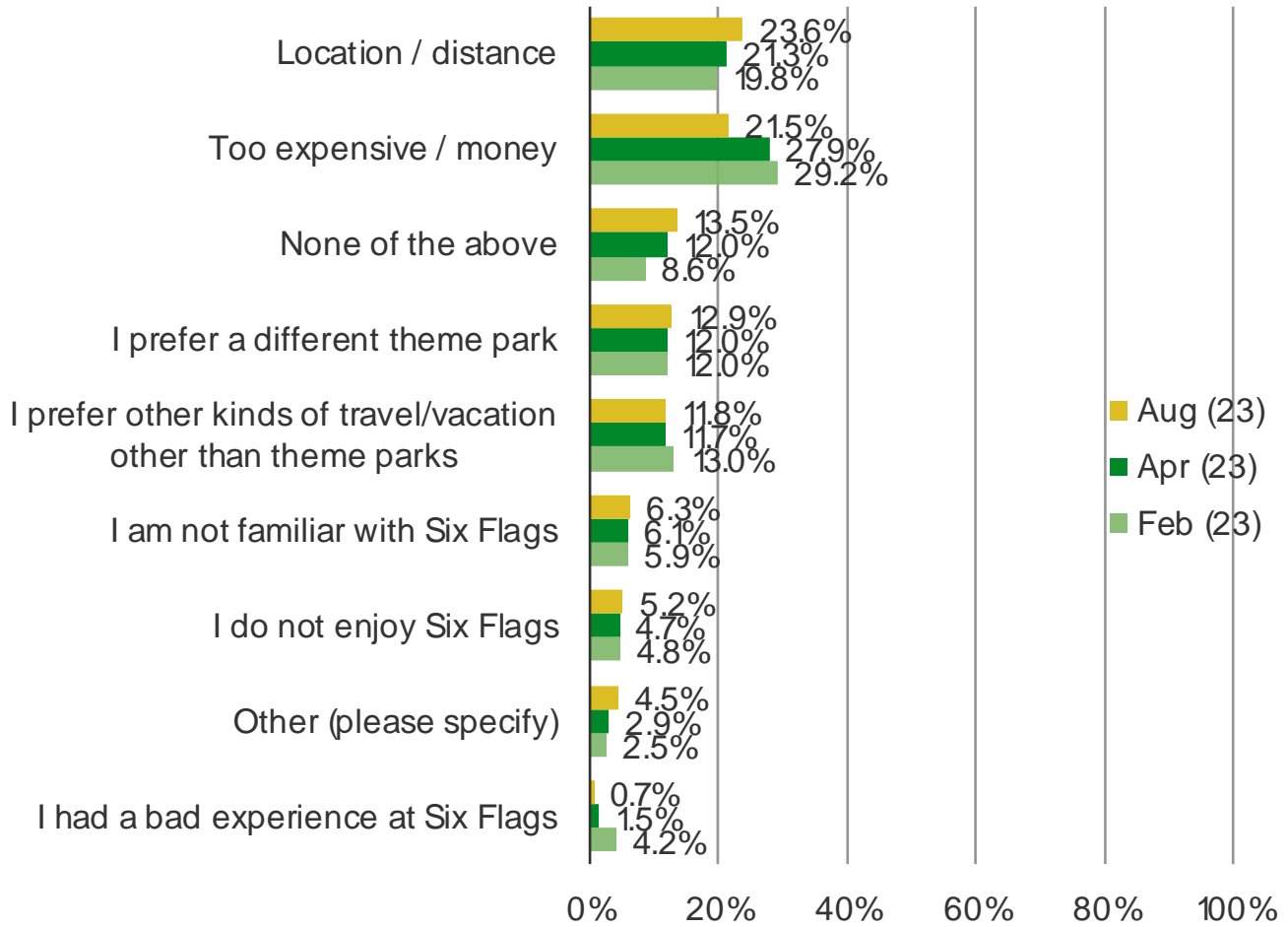
IN YOUR OPINION, HOW WORTH IT IS THE EXPERIENCE FOR THE PRICE THAT IT COST TO VISIT THE THEME PARK?

Posed to all respondents.



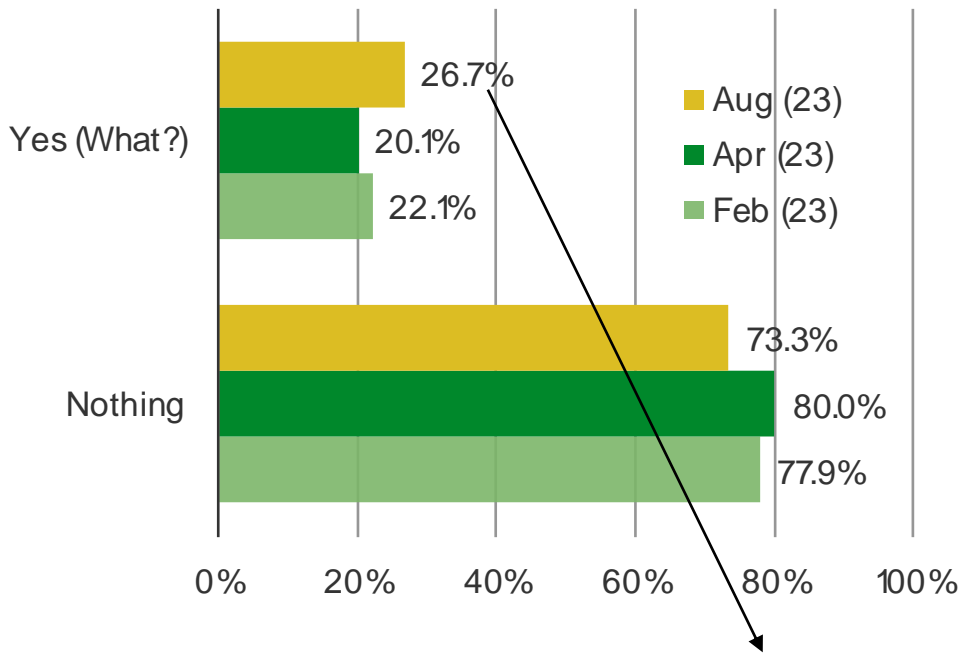
WHAT IS THE PRIMARY REASON YOU ARE NOT VISITING A SIX FLAGS THEME PARK IN THE NEXT 12 MONTHS?

Posed to all respondents who do not have plans to visit the above.



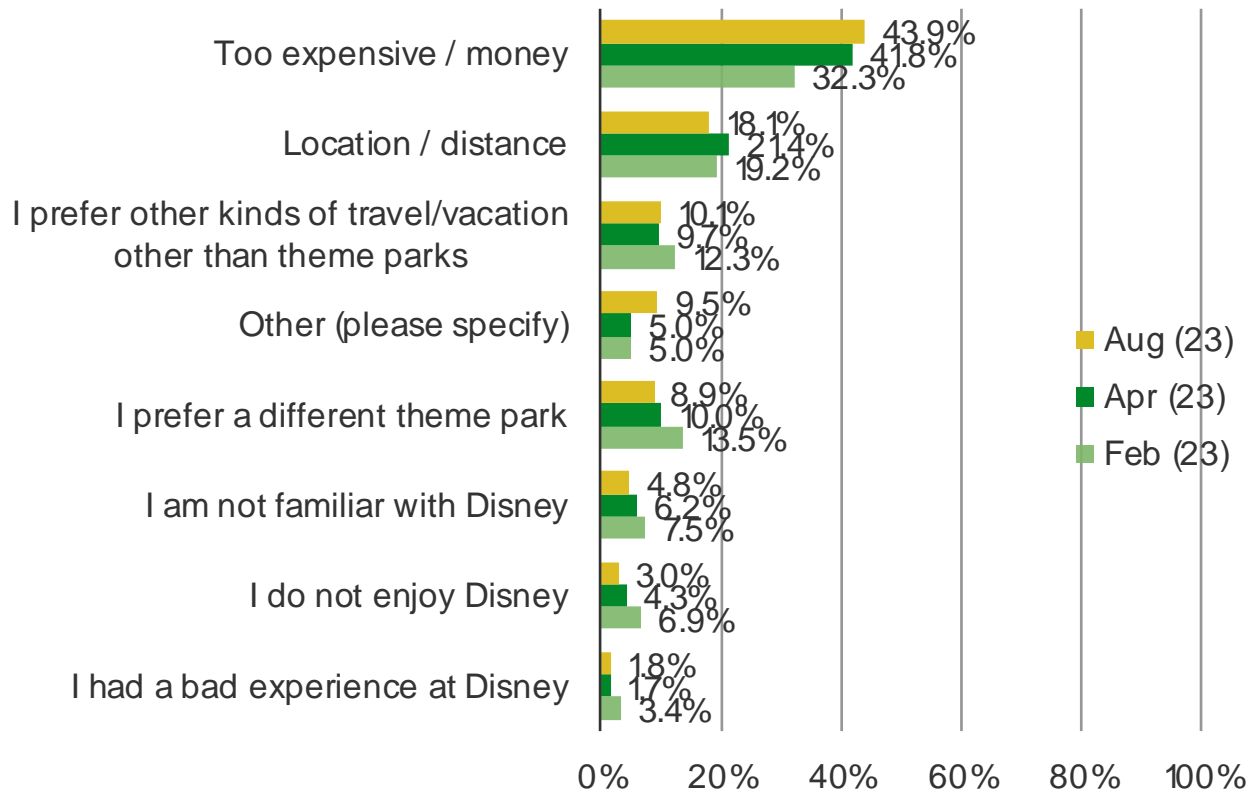
IS THERE ANYTHING THAT WOULD MAKE YOU INTERESTED IN VISITING A SIX FLAGS THEME PARK IN THE FUTURE?

Posed to all respondents who do not have plans to visit the above.



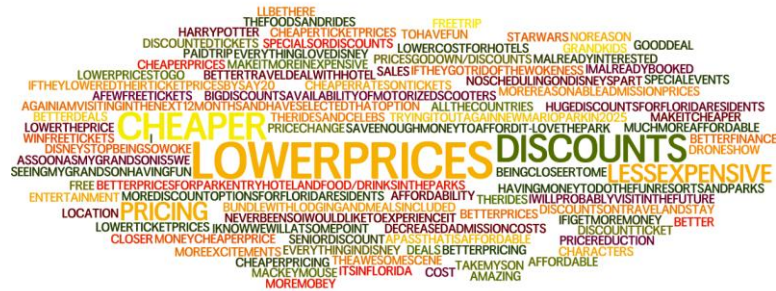
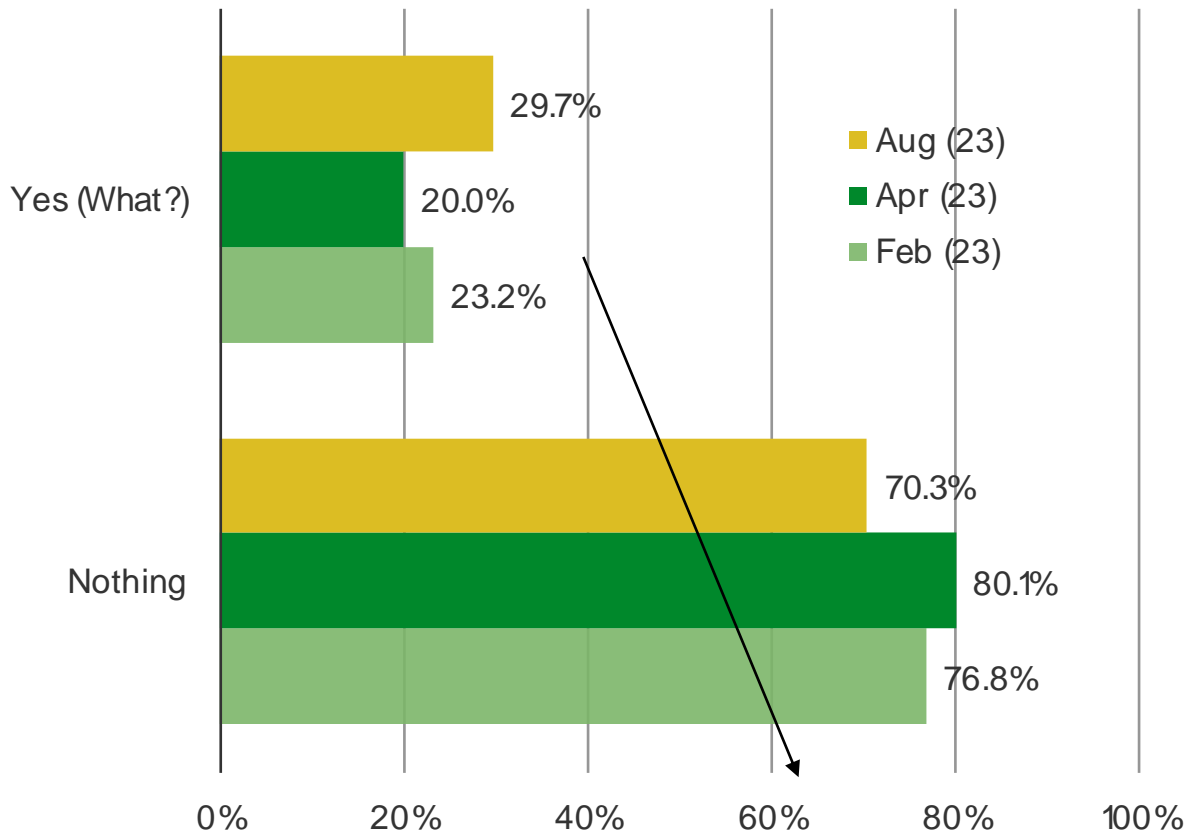
WHAT IS THE PRIMARY REASON YOU ARE NOT VISITING A DISNEY THEME PARK IN THE NEXT 12 MONTHS?

Posed to all respondents who do not have plans to visit the above.



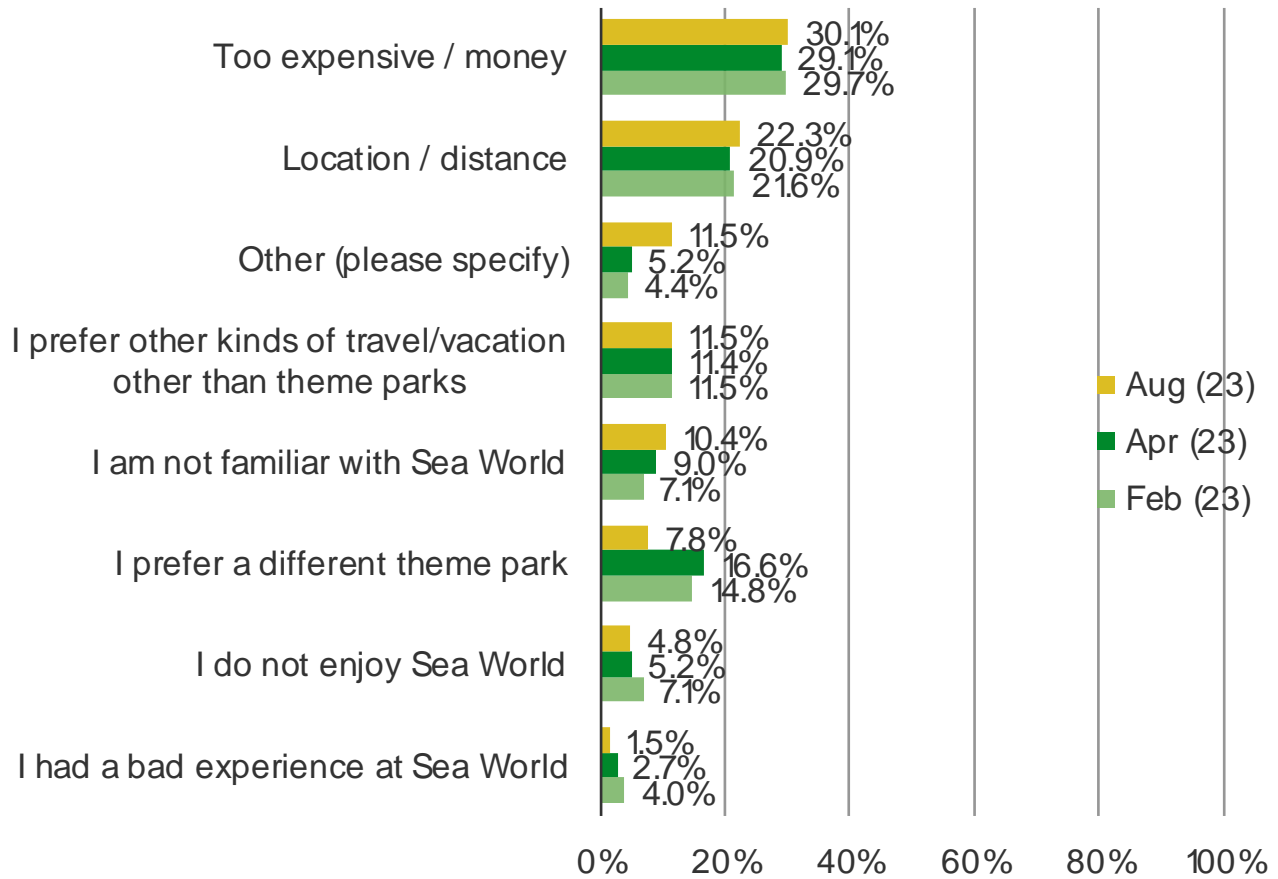
IS THERE ANYTHING THAT WOULD MAKE YOU INTERESTED IN VISITING A DISNEY THEME PARK IN THE FUTURE?

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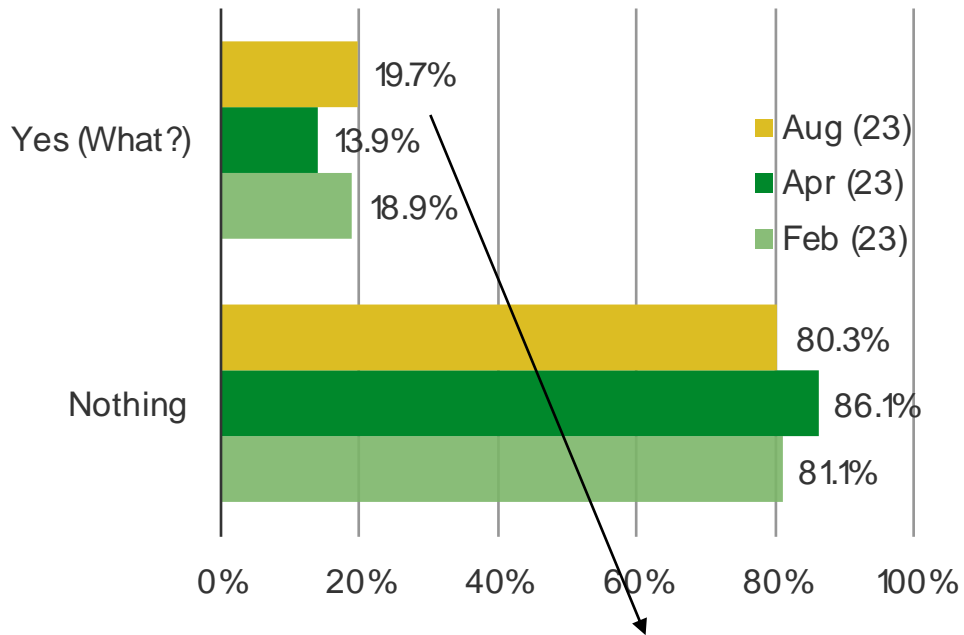
WHAT IS THE PRIMARY REASON YOU ARE NOT VISITING A SEA WORLD THEME PARK IN THE NEXT 12 MONTHS?

Posed to all respondents who do not have plans to visit the above.



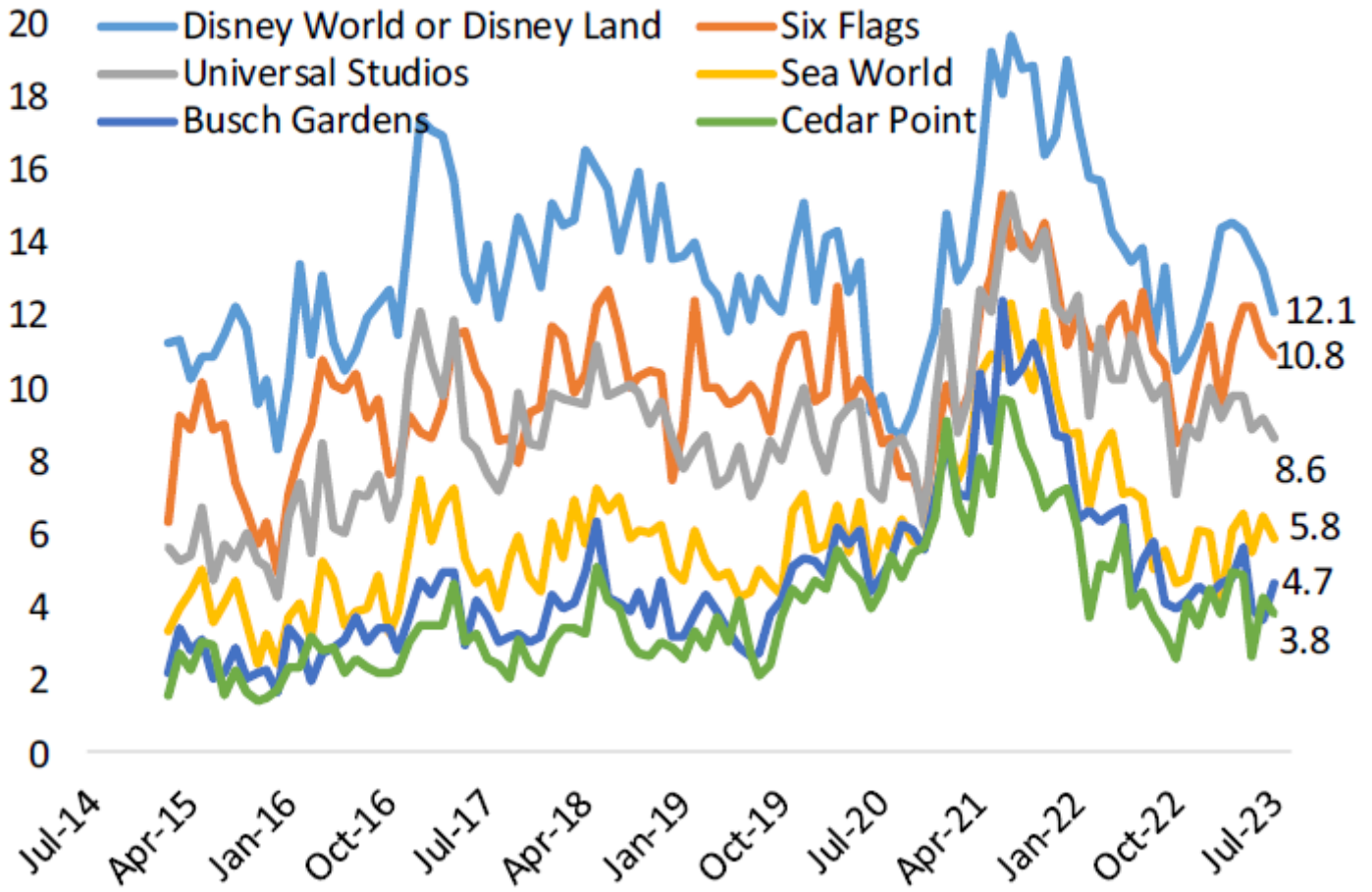
IS THERE ANYTHING THAT WOULD MAKE YOU INTERESTED IN VISITING A SEA WORLD THEME PARK IN THE FUTURE?

Posed to all respondents who do not have plans to visit the above.



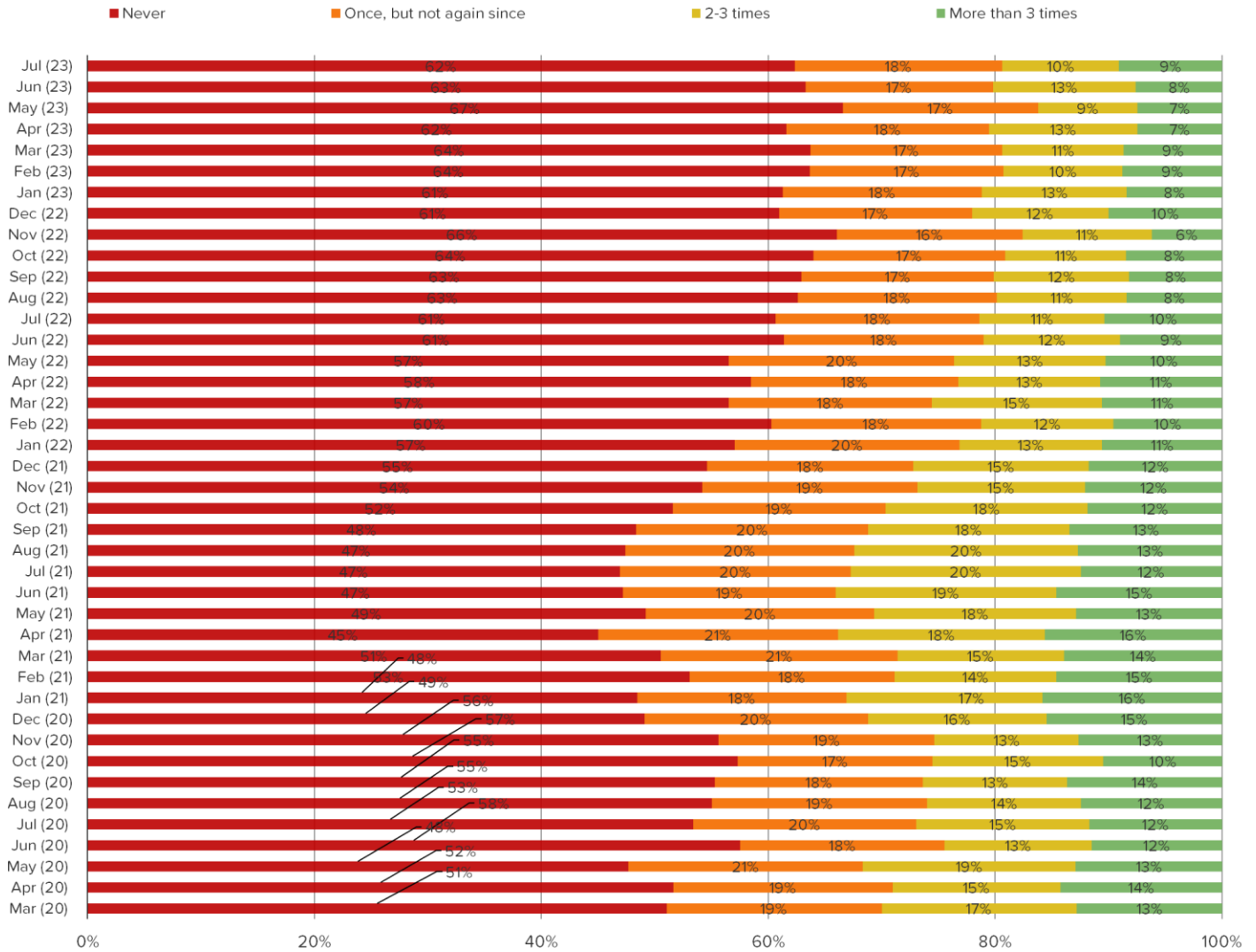
MONTHLY SURVEY – THEME PARK VISIT INTENTIONS TRACKER

Plans To Visit Theme Parks: Next Six Months (% Respondents)



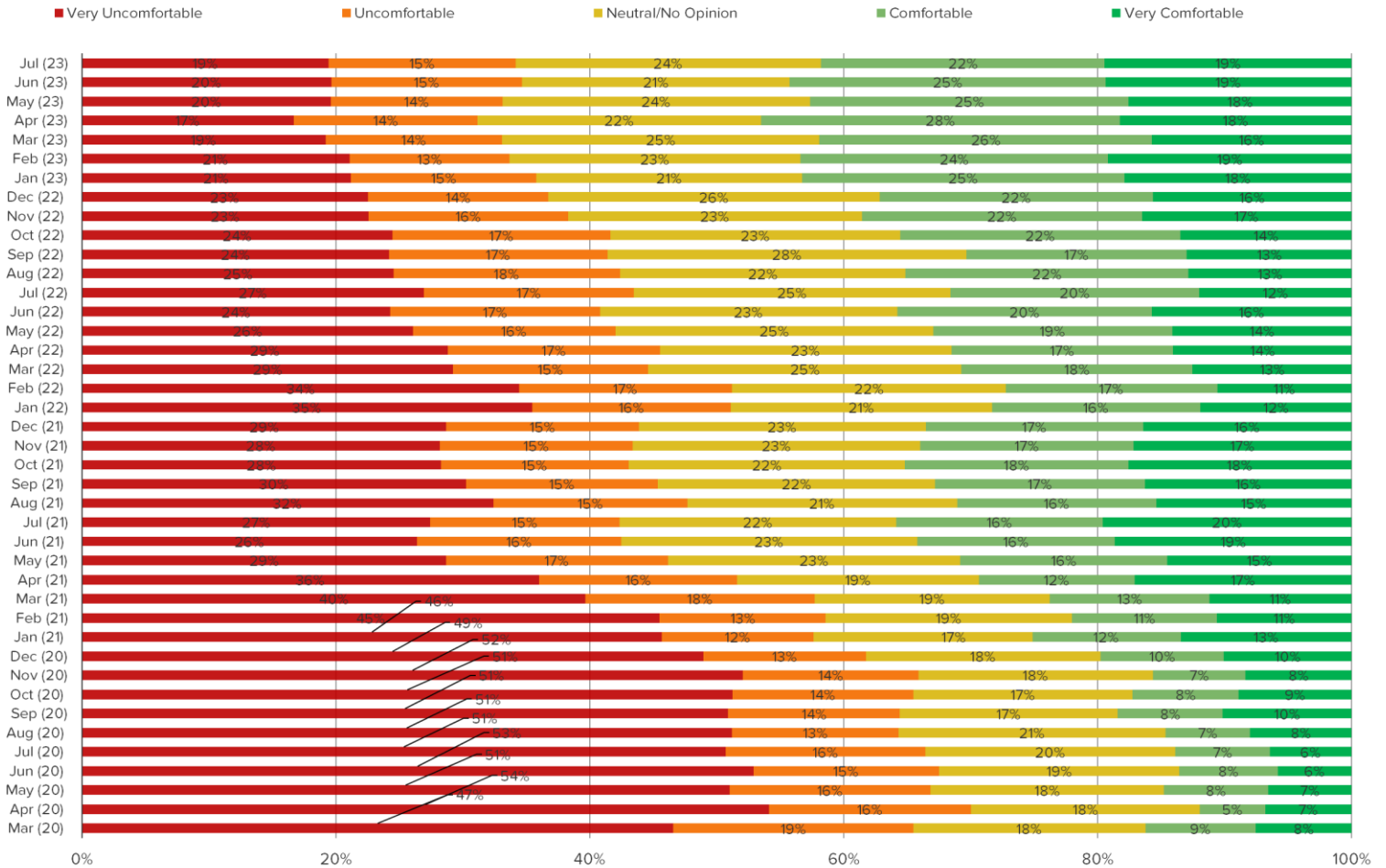
HAVE YOU EVER GONE ON A CRUISE? (FROM OUR MONTHLY SURVEY)

Posed to all respondents.



WOULD YOU FEEL COMFORTABLE GOING ON A CRUISE TODAY?

Posed to all respondents.



AMONG THOSE NOT CURRENTLY COMFORTABLE WITH GOING ON A CRUISE | WHEN WOULD YOU FEEL COMFORTABLE GOING ON A CRUISE?

Posed to respondents who currently wouldn't feel comfortable going on a cruise (the N size has declined over time (see prior page)

