

# Bespoke Survey Research

November 2023

## Theme Parks and Cruises

Volume 4 | Quarterly Survey

1,250+ US Consumers Balanced To Census

Tickers Covered: DIS, SIX, FUN, SEAS.

### KPIs and Key questions

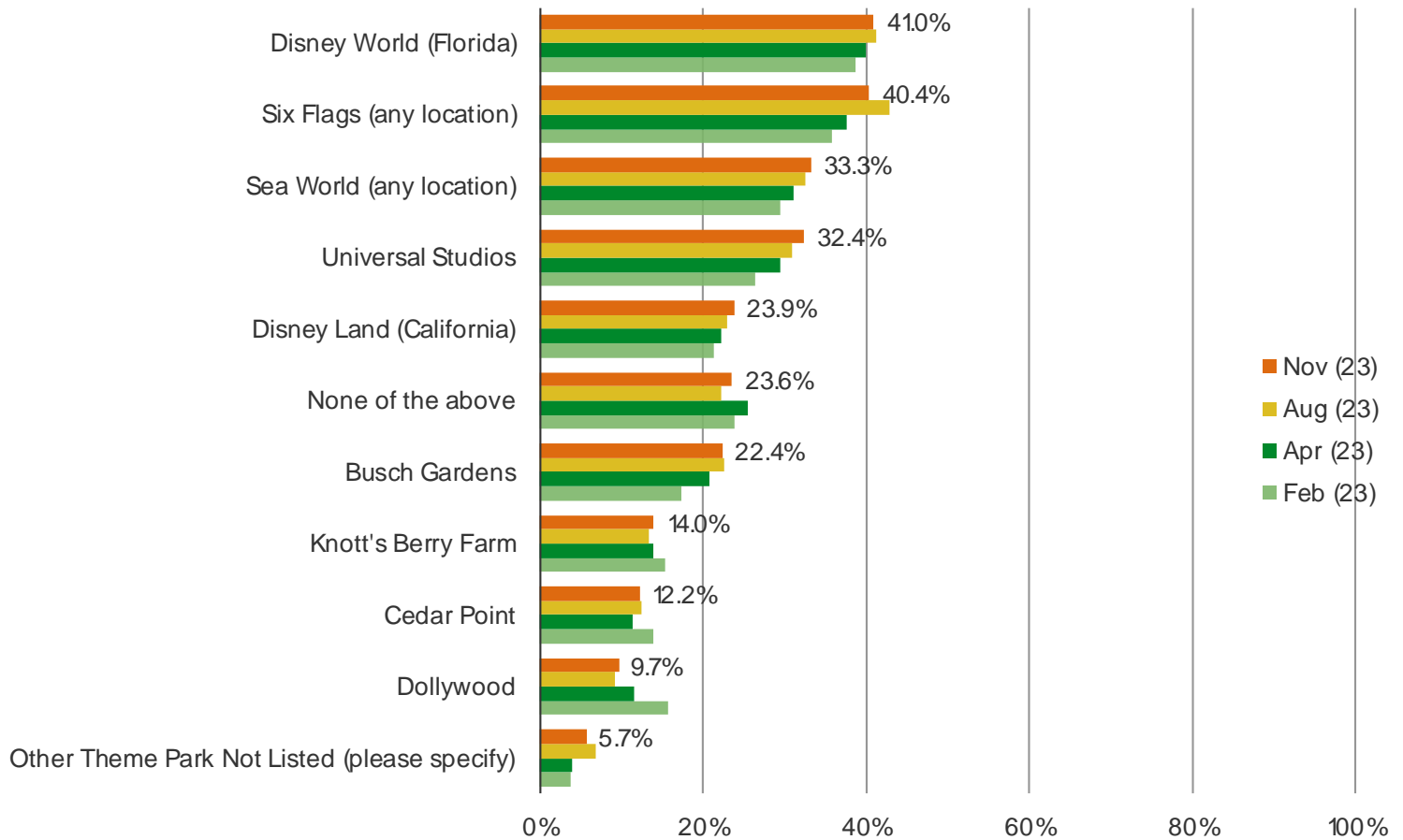
1. The share of consumers who have visited each of the theme parks in our survey has been in-line to better sequentially since we started tracking this in February of 2023.
2. Those who have visited the theme parks in our survey most associated each with the adjective "fun." Both Disney World and Disney Land also had a lot of people filling in the word "expensive."
3. Consumer opinions of theme parks tested in our survey and feedback related to in-park experience is generally positive and has changed little sequentially.
4. Visitors view both Disney parks and Universal as more expensive relative to alternatives we test like Sea World and Six Flags. Notably, customer views of Sea World has shifted in the direction of it being viewed as less expensive throughout this year.
5. Universal Studios received the strongest NPS score of all the theme parks in our survey. Segmented NPS readings are very different based on visit recency (ie, respondents who have been in the past year offer much stronger scores than those who have simply been at any point in their life).
6. In general, relative to earlier in the year visitor opinion of value of the visit relative to the cost has softened (still a net positive reading, but relatively softer compared to earlier in the year when customers were conceivably pushing back on price less).
7. Visit likelihood going forward improved q/q but is still worse than readings in the beginning of 2023. The top reason for not having plans to visit for each park is related to price.

### Noteworthy Stats:

- 25.4%** 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.
- 45.5%** 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.
- 31.8%** 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

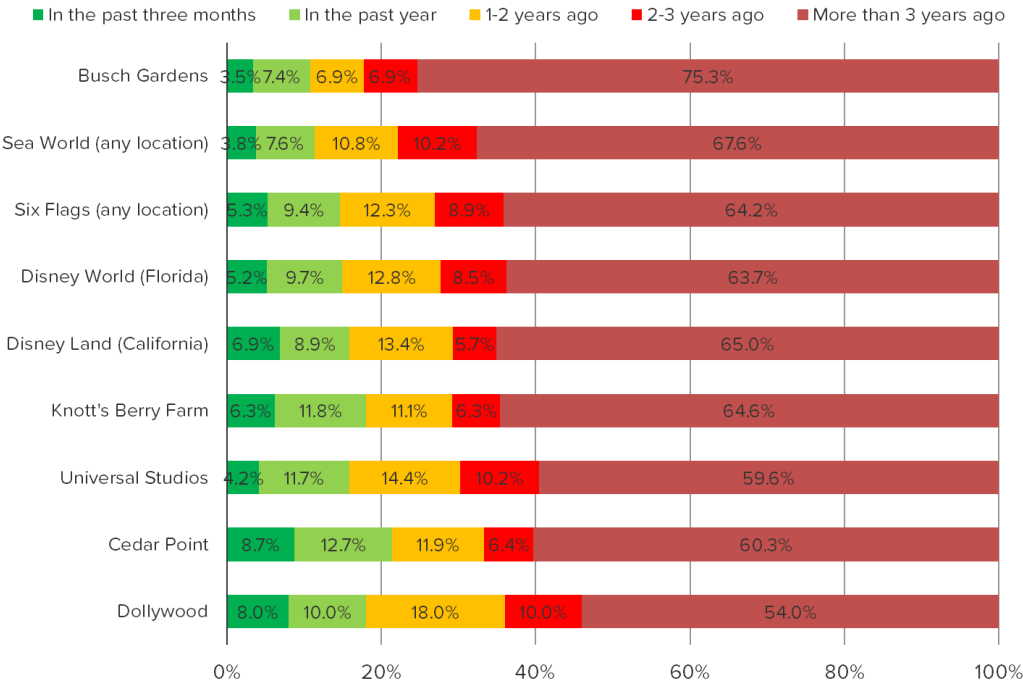
Posed to all respondents.



WHEN DID YOU MOST RECENTLY VISIT THIS THEME PARK?

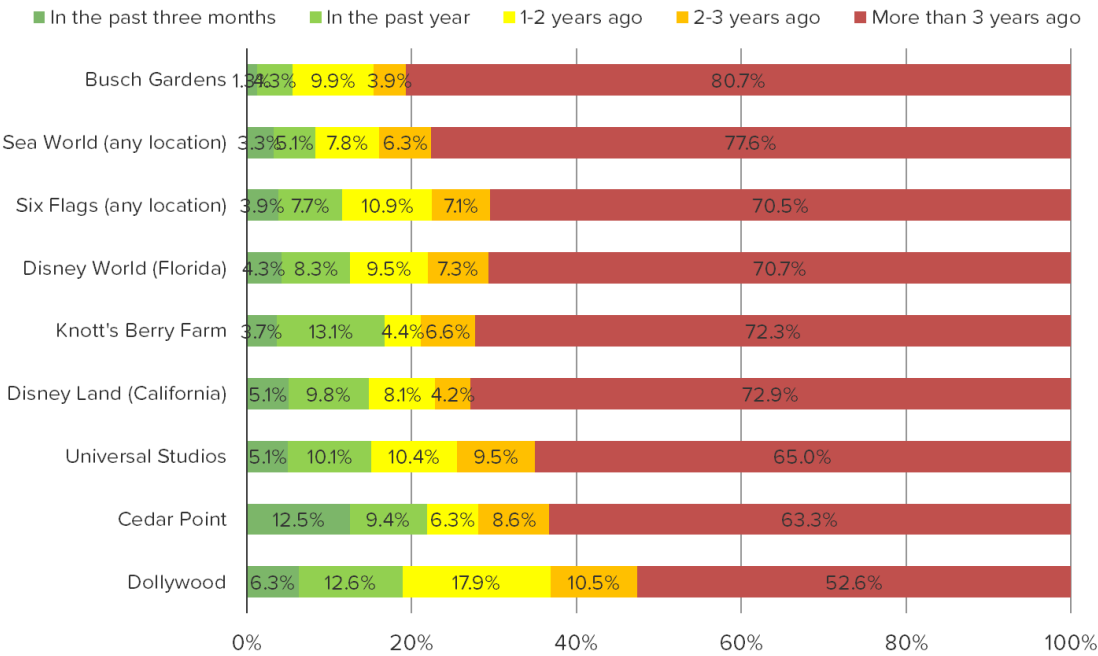
Posed to all respondents who have visited each of the below.

November 2023



	N=
Dollywood	100
Cedar Point	126
Universal Studios	334
Knott's Berry Farm	144
Disney Land (California)	246
Disney World (Florida)	422
Six Flags (any location)	416
Sea World (any location)	343
Busch Gardens	231

August 2023

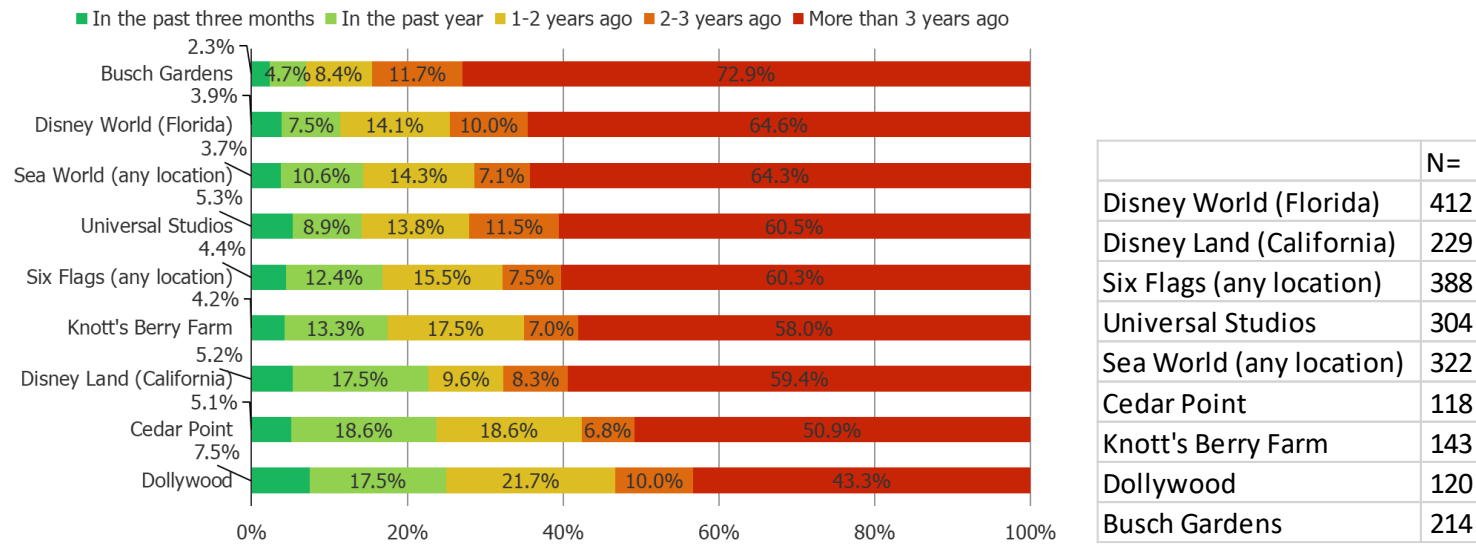


	N=
Dollywood	95
Cedar Point	128
Universal Studios	317
Disney Land (California)	236
Knott's Berry Farm	137
Disney World (Florida)	423
Six Flags (any location)	440
Sea World (any location)	335
Busch Gardens	233

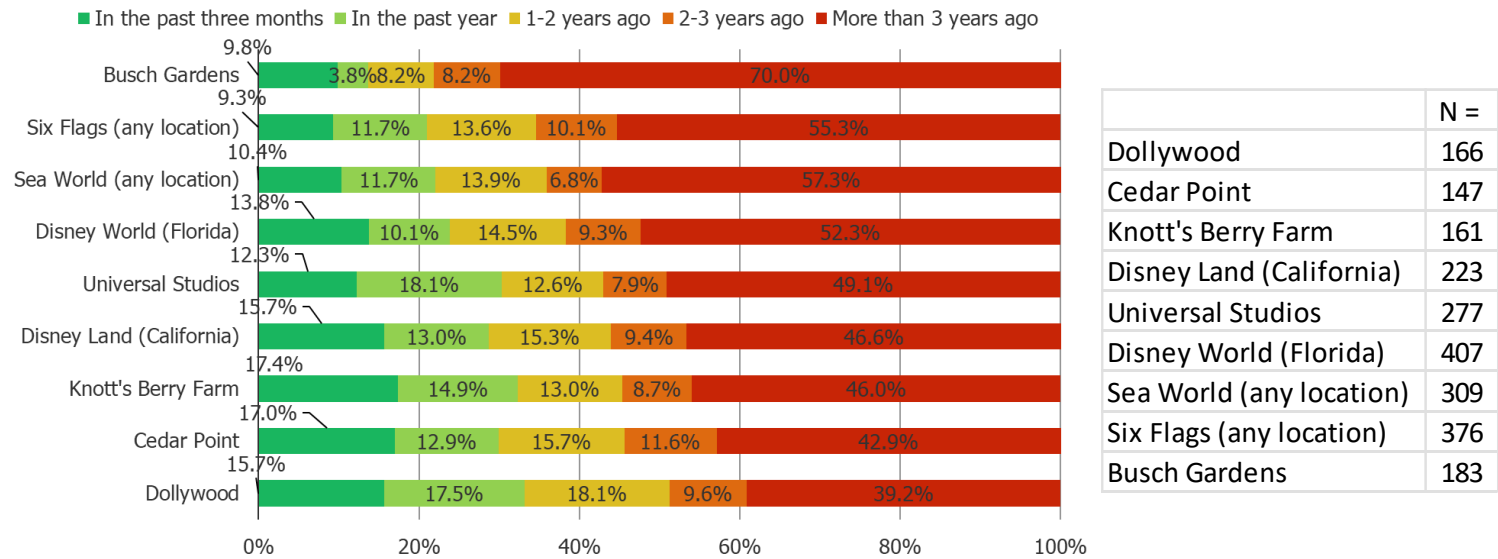
WHEN DID YOU MOST RECENTLY VISIT THIS THEME PARK?

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

April 2023



February 2023



IF YOU HAD TO USE ONE WORD TO DESCRIBE THE FOLLOWING, WHAT WOULD IT BE?

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

DISNEYWORLD



DISNEYLAND



SIX FLAGS



UNIVERSAL STUDIOS



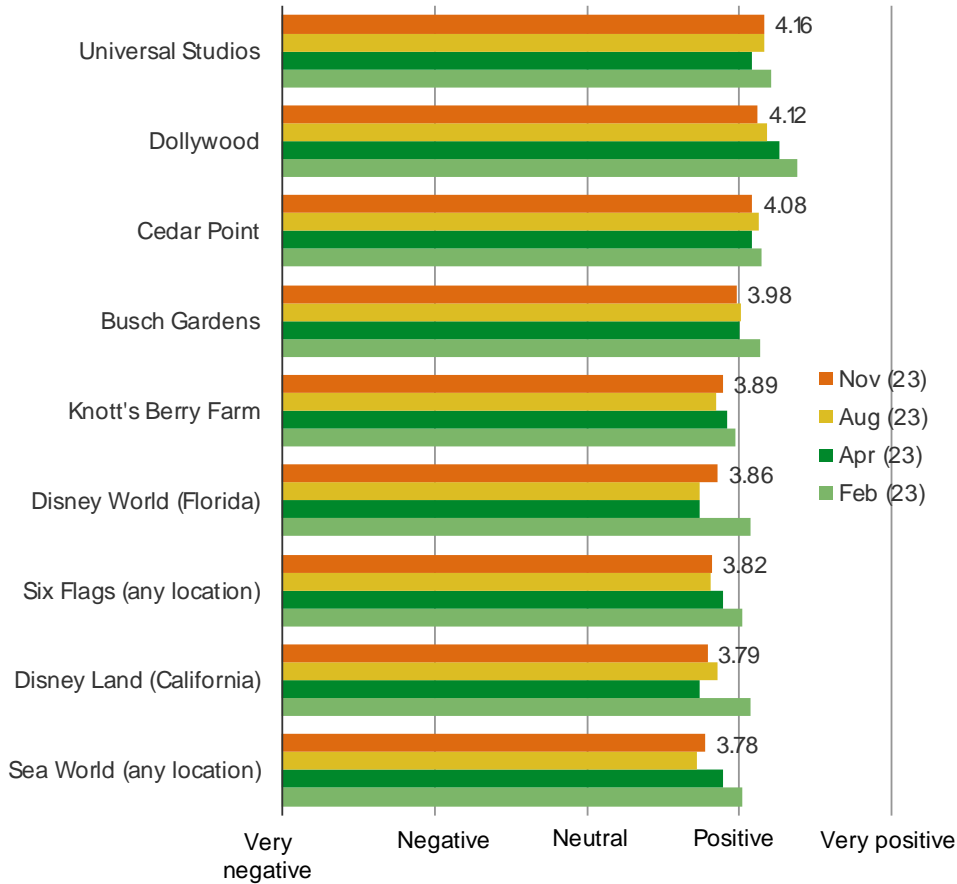
Posed to all respondents who have visited the below.

CEDAR POINT



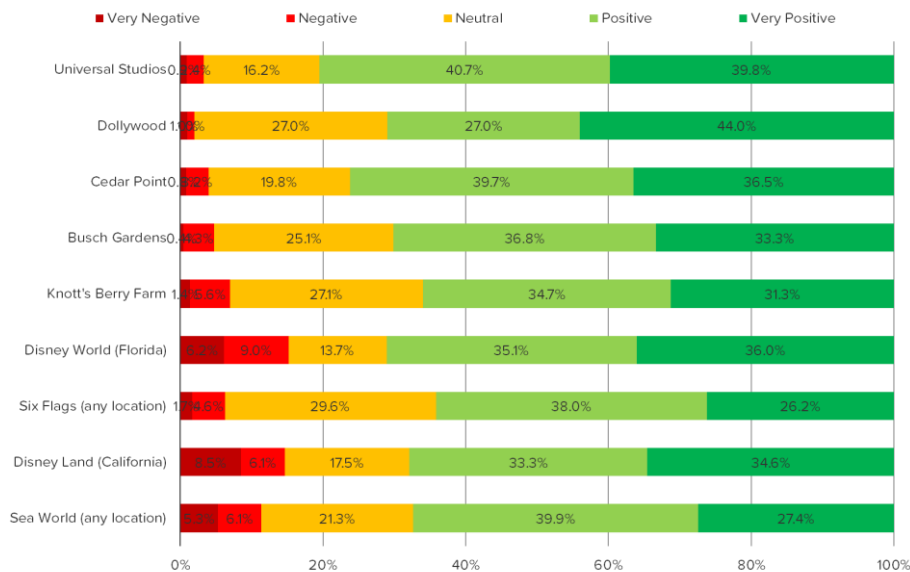
WHAT IS YOUR OPINION OF THE FOLLOWING:

Posed to all respondents who have visited the below.



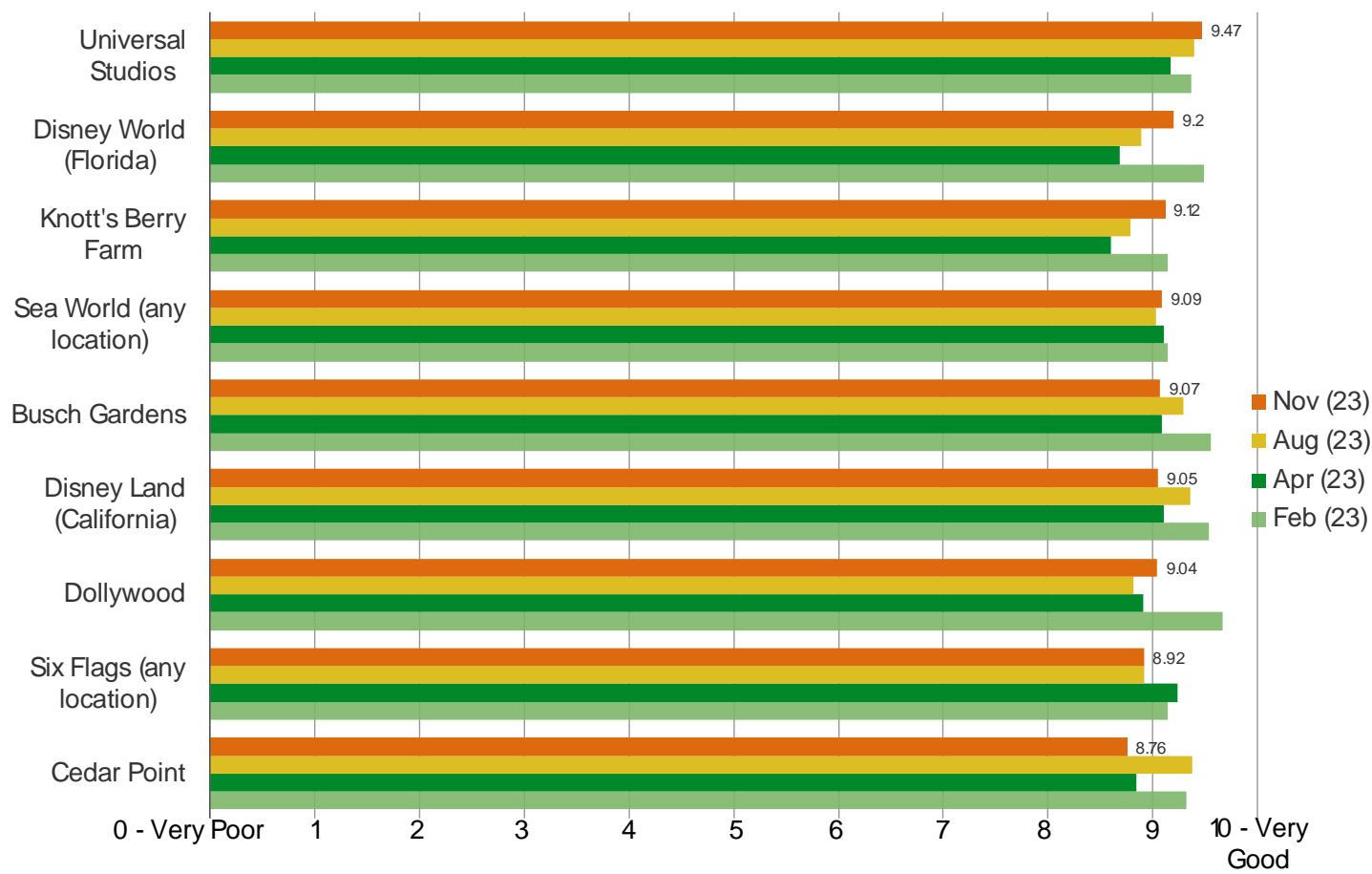
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Cedar Point	126
Dollywood	100
Universal Studios	334

November 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.

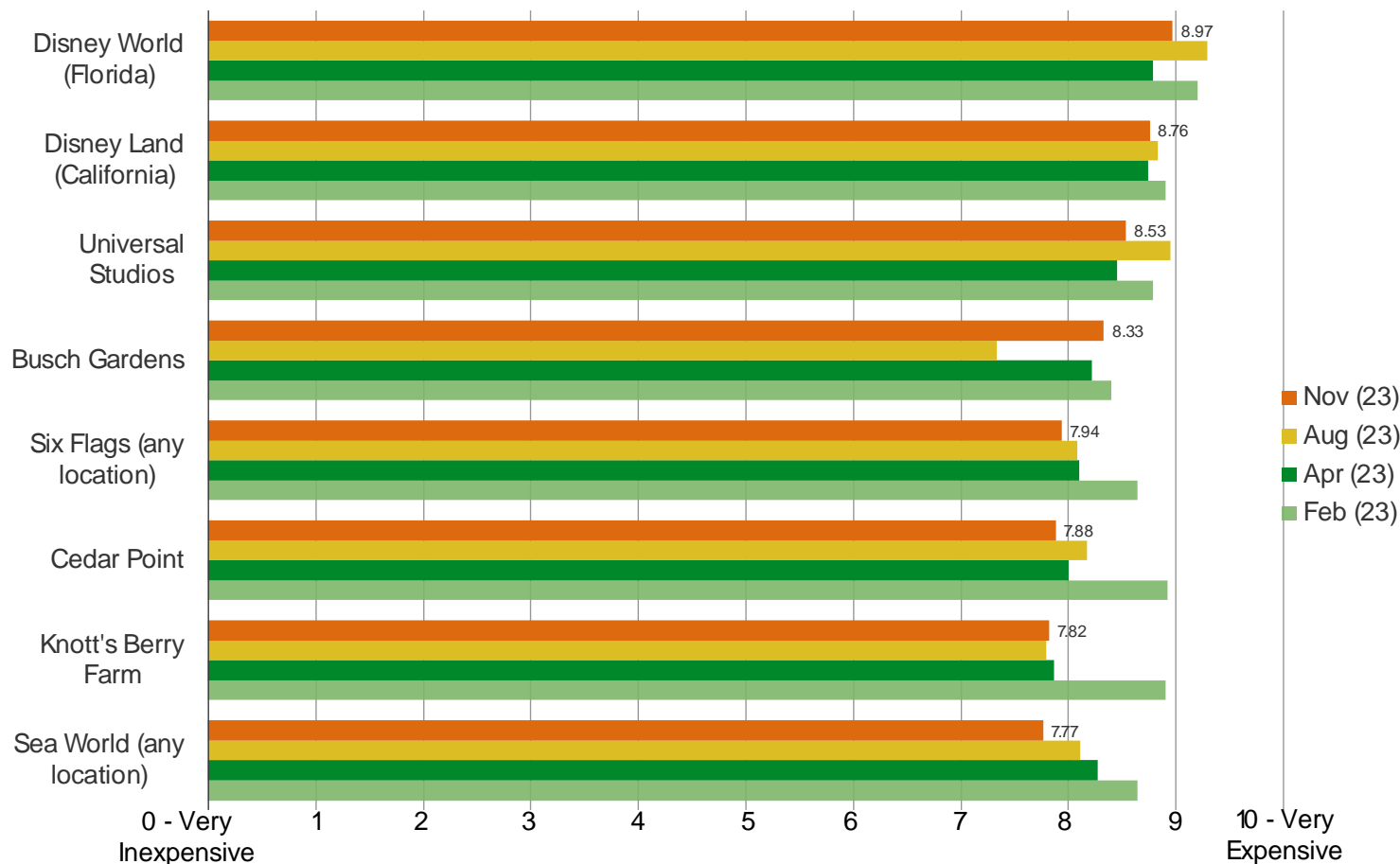


	N=
Disney World (Florida)	153
Disney Land (California)	86
Six Flags (any location)	149
Universal Studios	135
Sea World (any location)	111
Cedar Point	50
Knott's Berry Farm	51
Dollywood	46
Busch Gardens	57



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

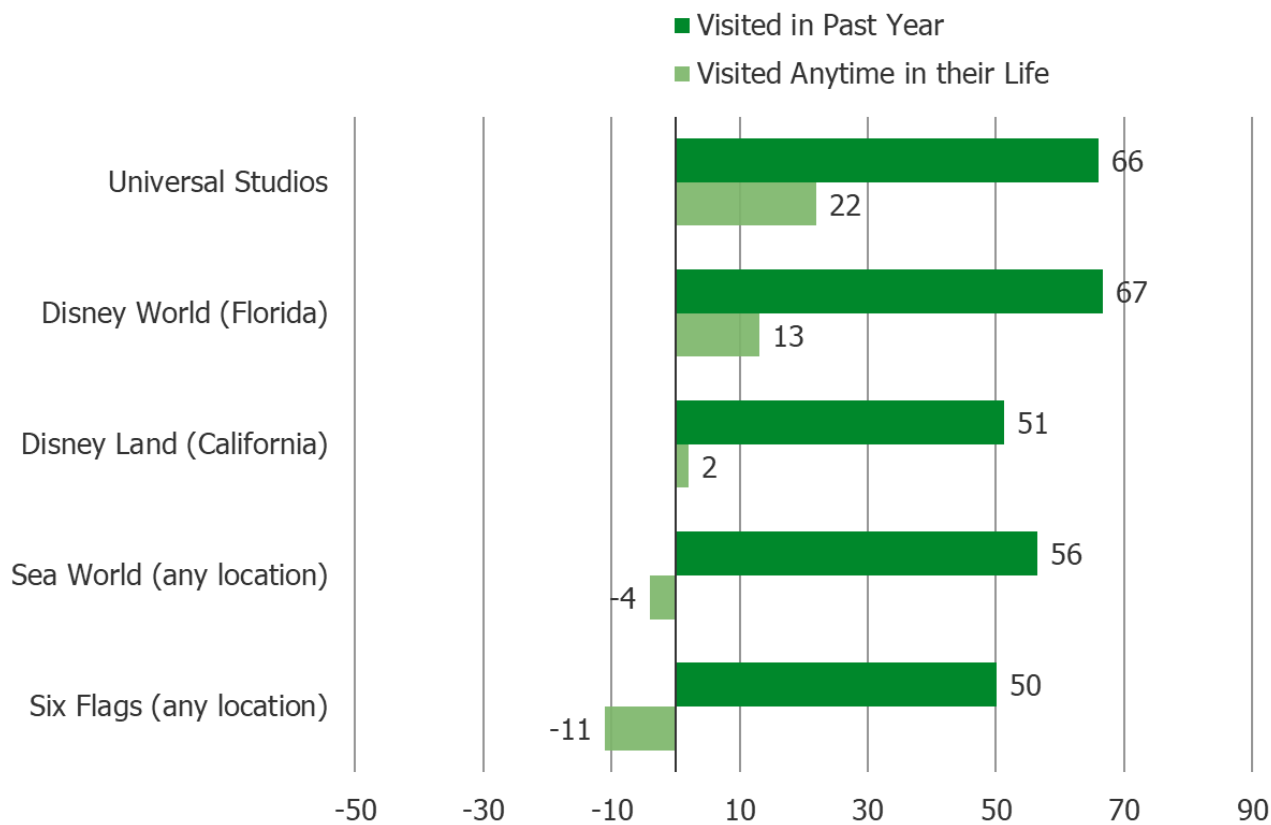
Posed to all respondents who have visited the below most recently in the past three years.



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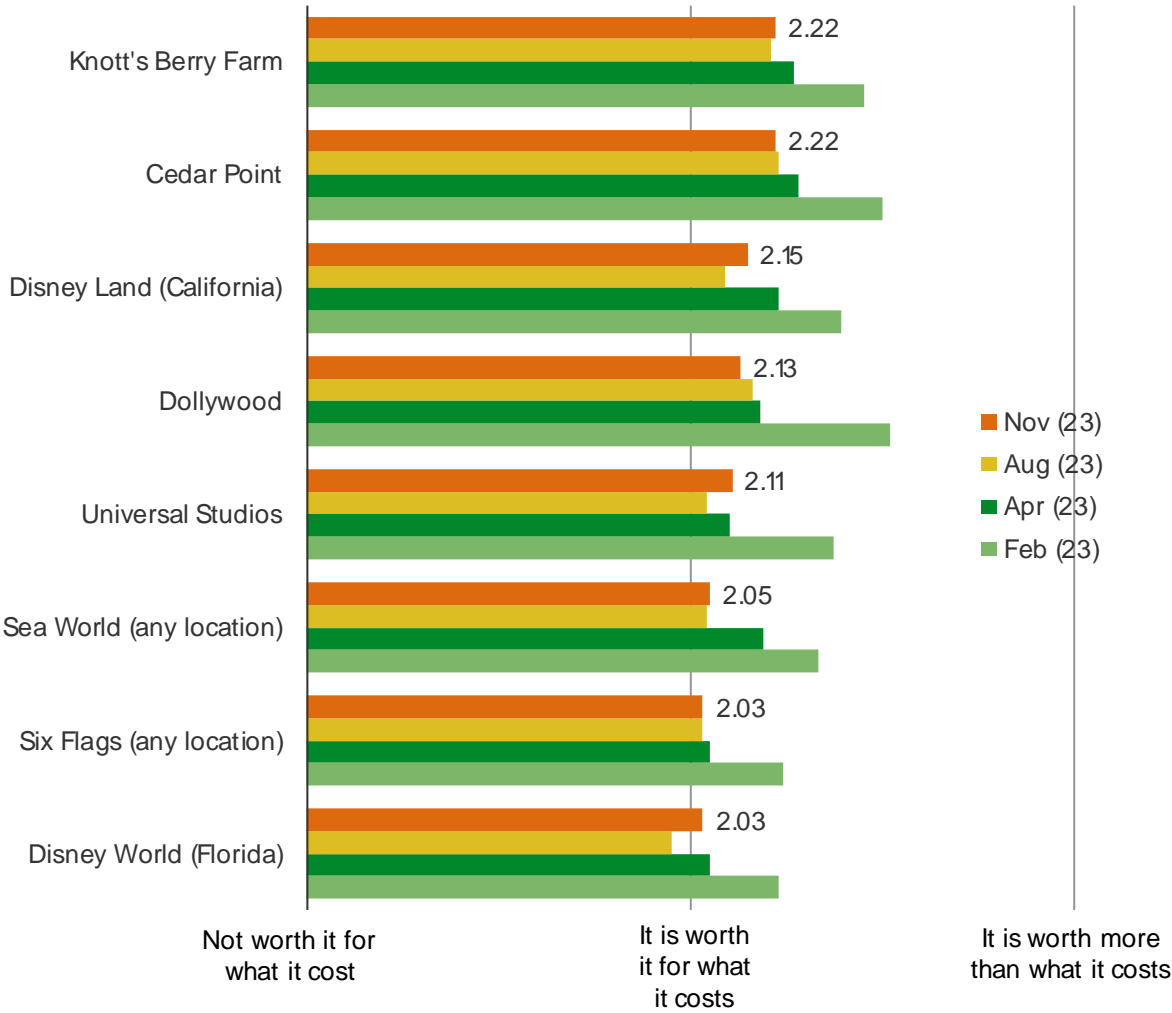
NPS – HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

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



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

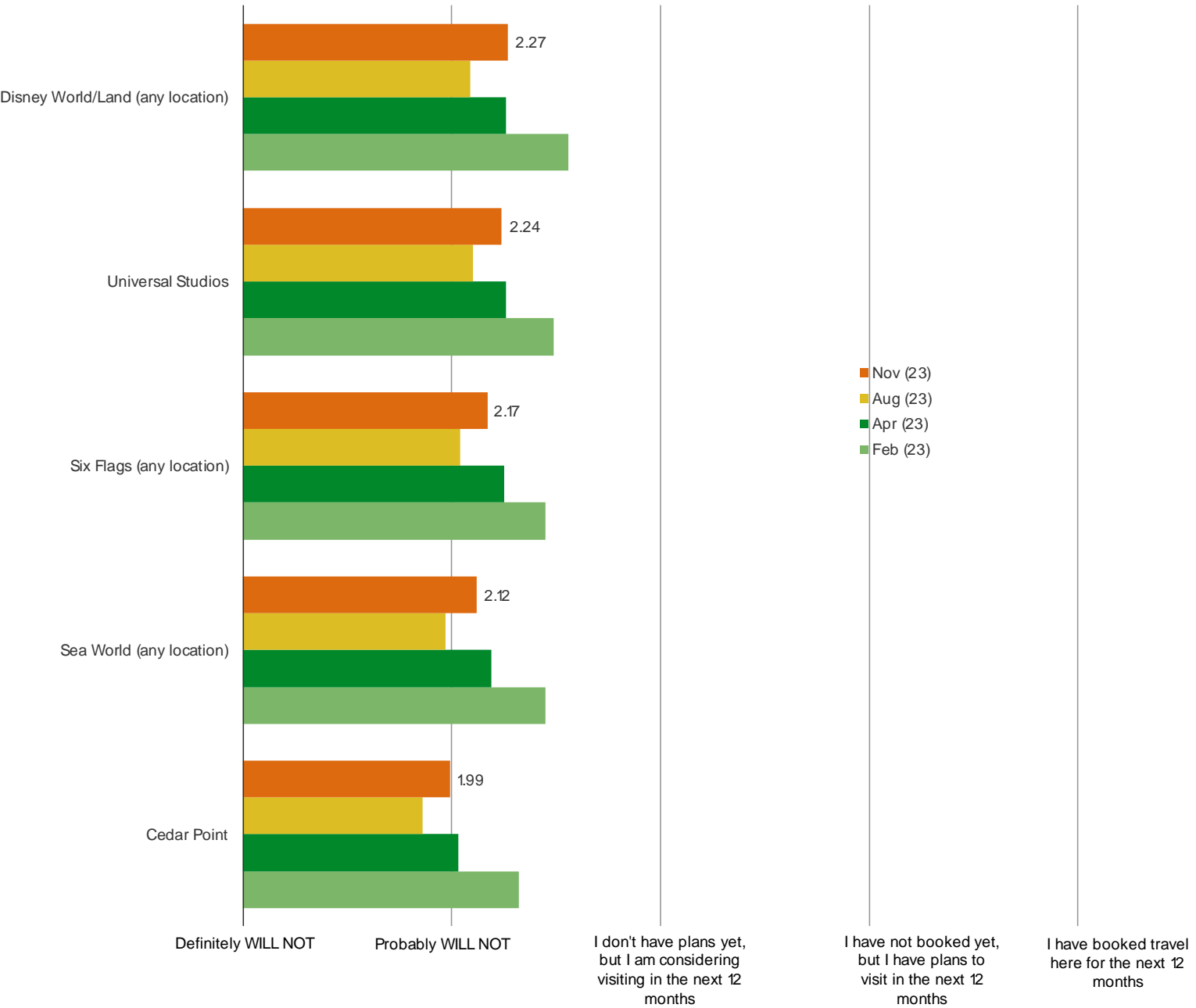
Posed to all respondents who have visited the below.



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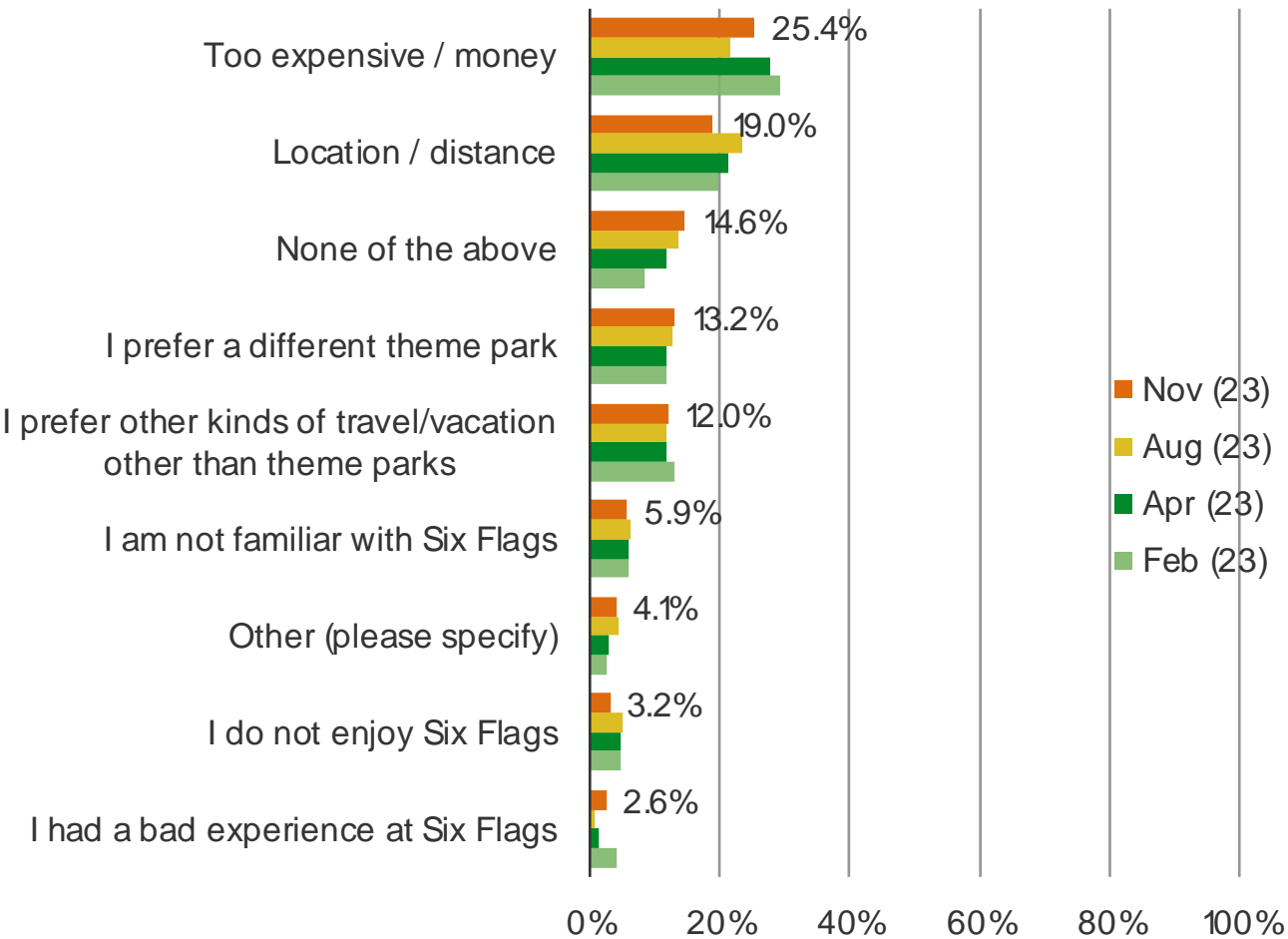
HOW LIKELY ARE YOU TO VISIT THE FOLLOWING IN THE NEXT 12 MONTHS...?

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.

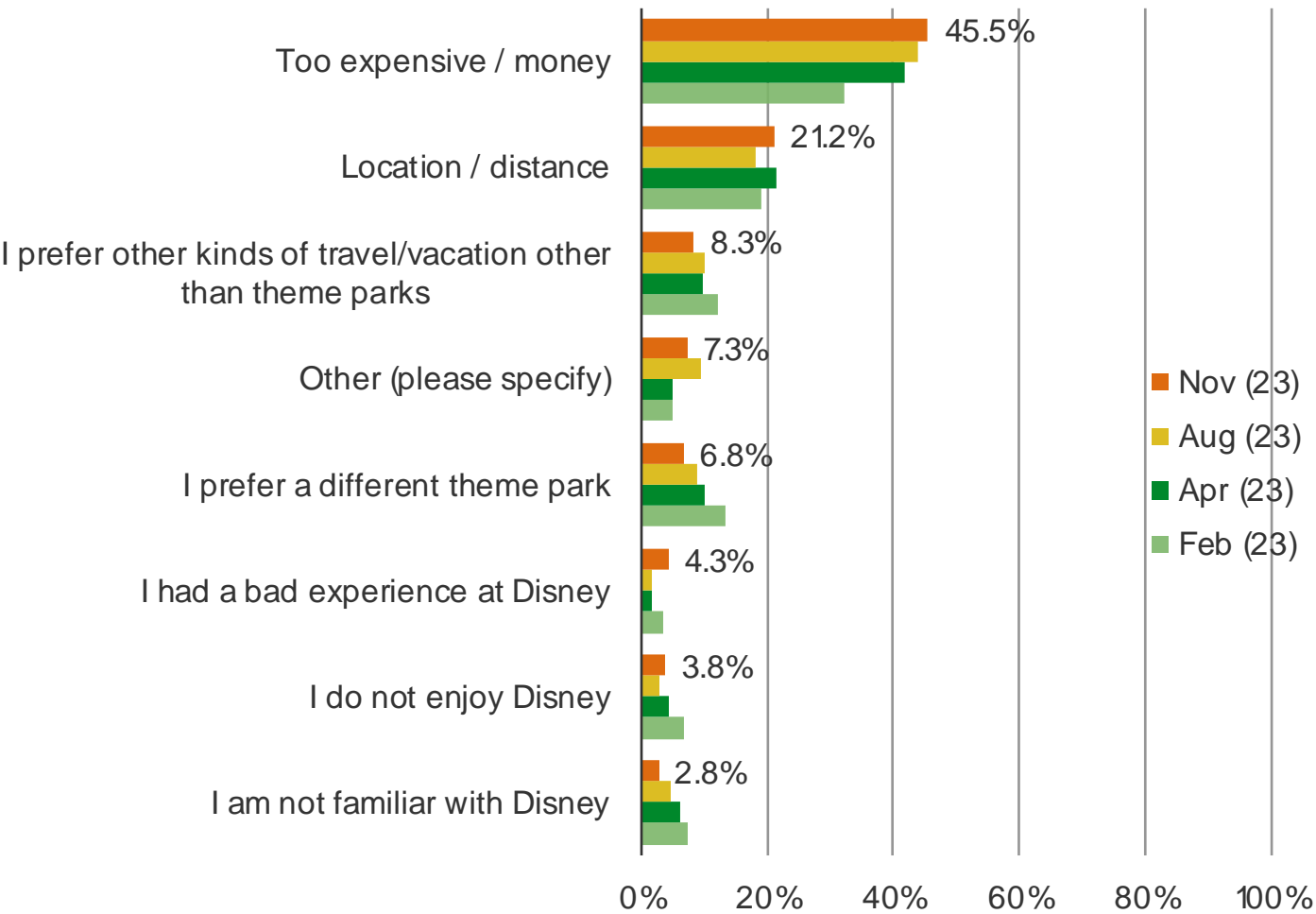


Posed to all respondents who do not have plans to visit the above.



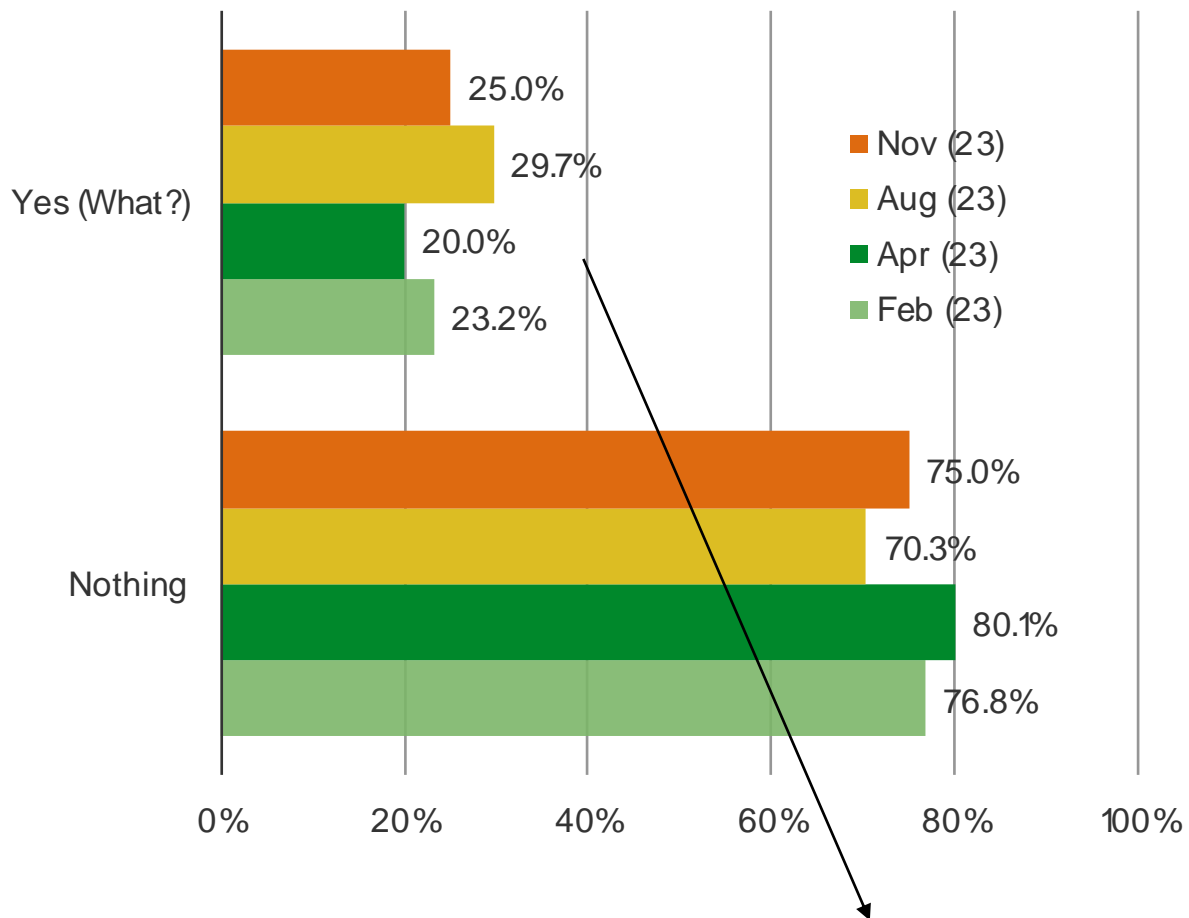
WHAT IS THE PRIMARY REASON YOU ARE NOT VISITING A DISNEY THEME PARK IN THE NEXT 12 MONTHS?

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?

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



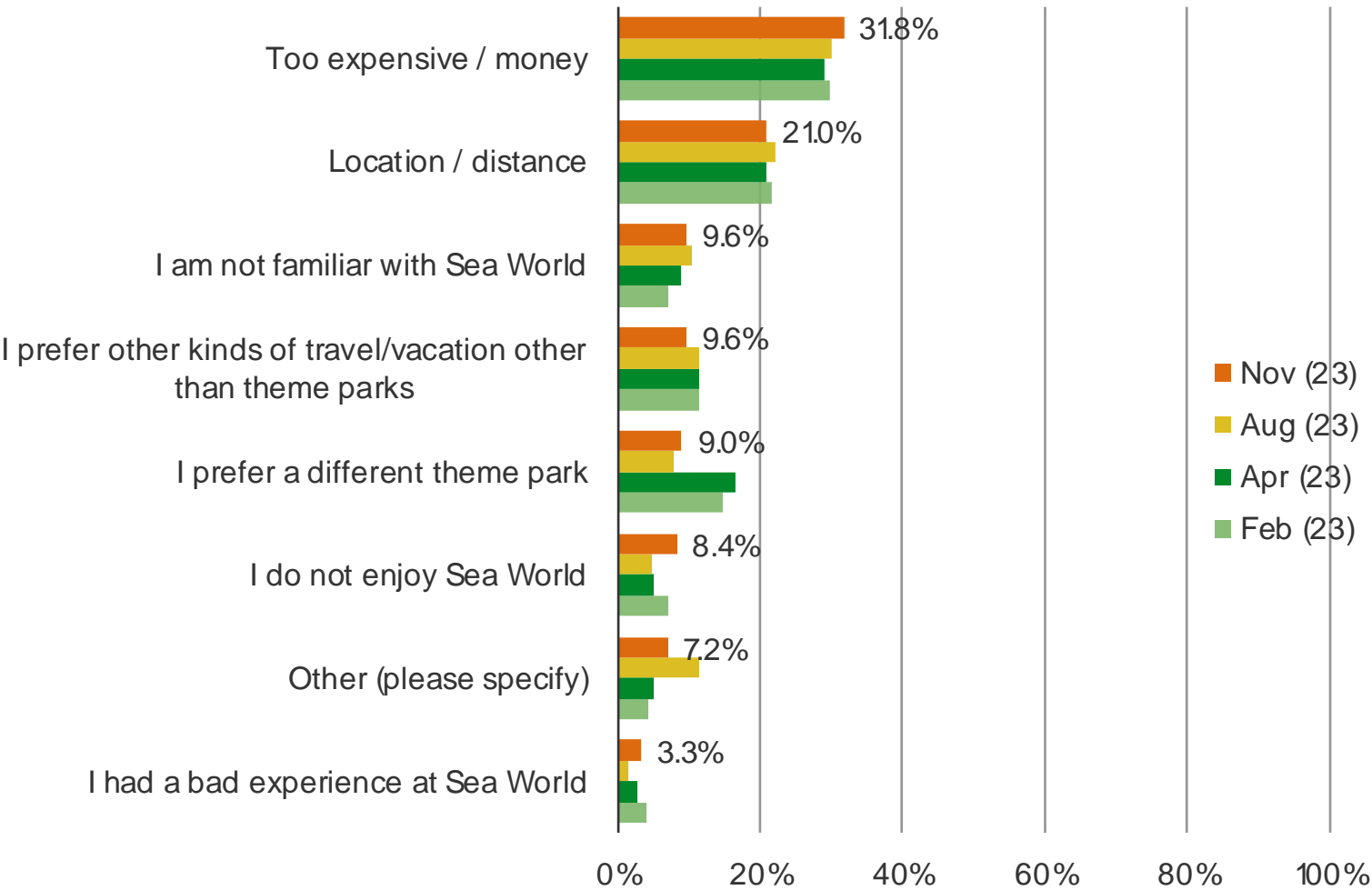
**LOWERPRICES**

PRETICKETS  
DISCOUNTS  
CHEAPER  
EVERYTHING



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

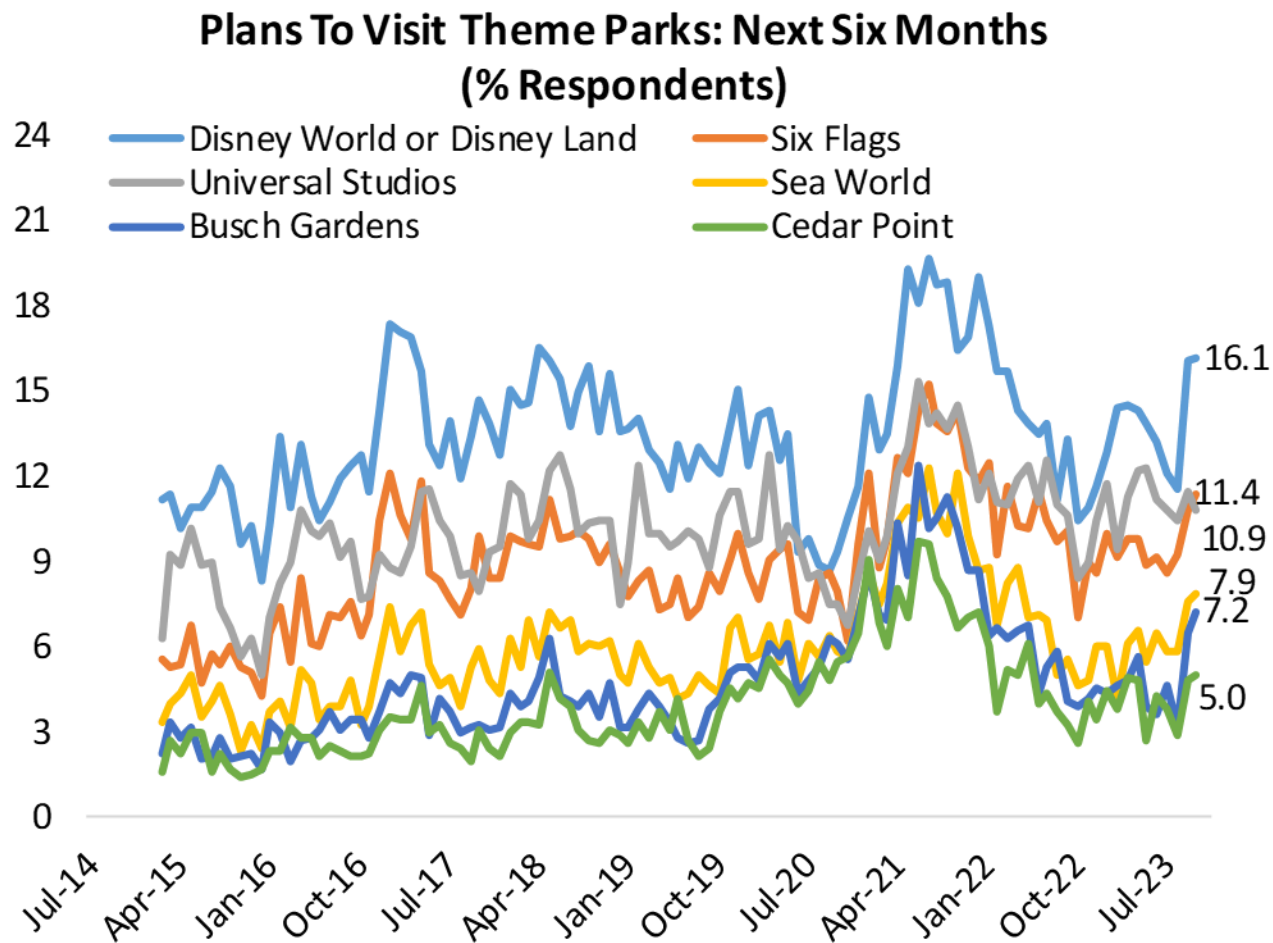
Posed to all respondents who do not have plans to visit the above.



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



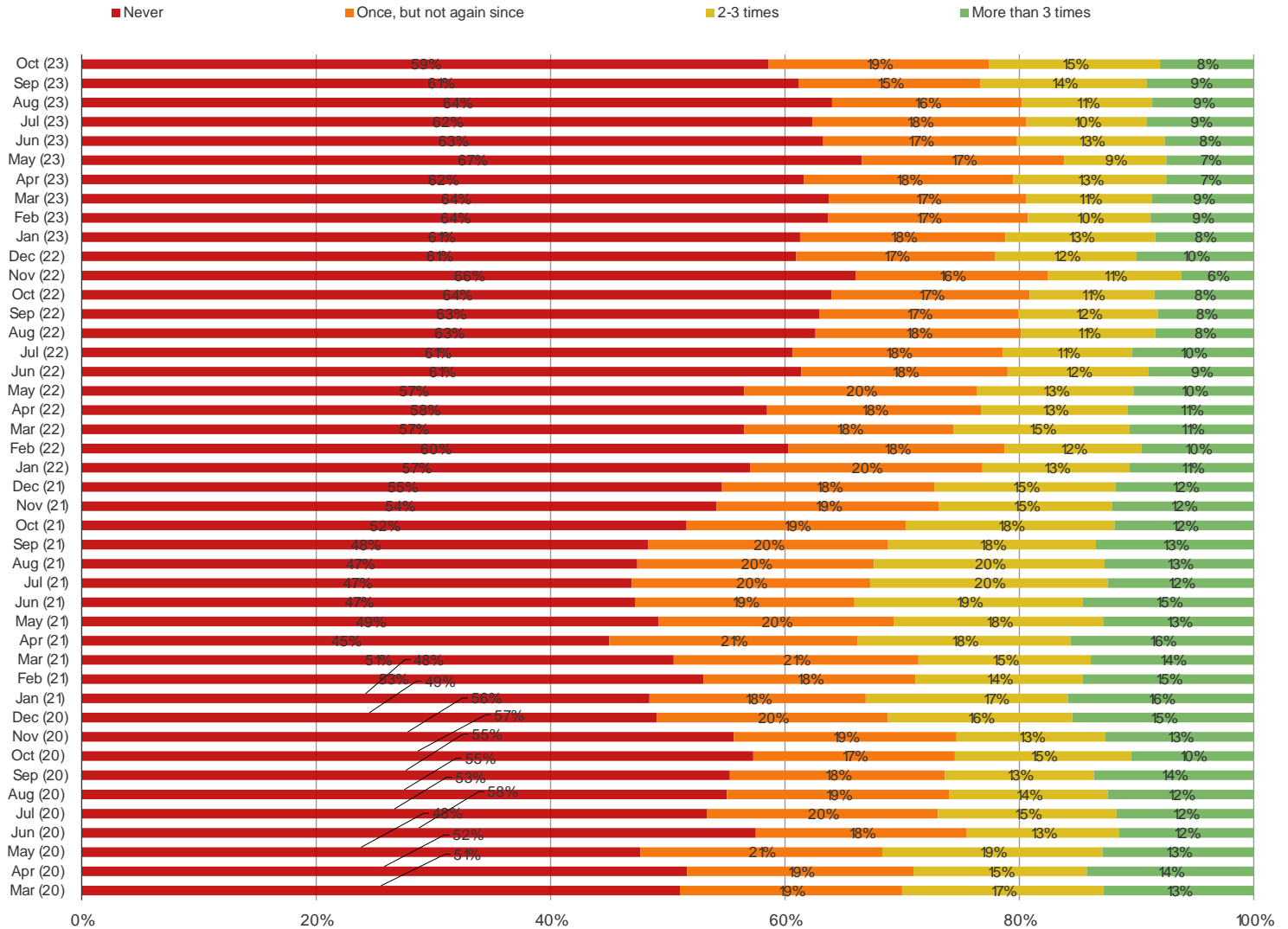
MONTHLY SURVEY – THEME PARK VISIT INTENTIONS TRACKER



Note: Latest Datapoint is October 2023

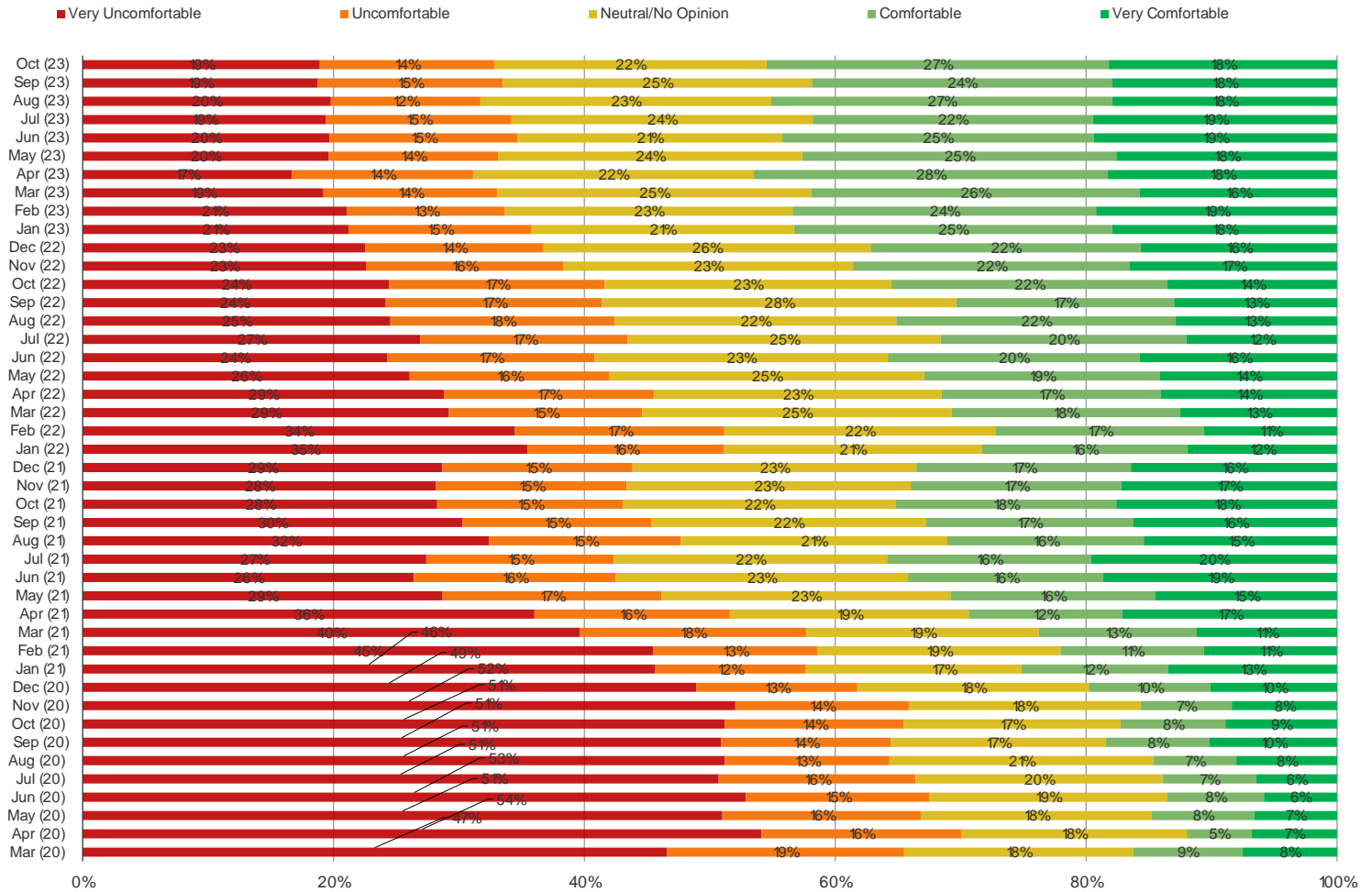
HAVE YOU EVER GONE ON A CRUISE? (FROM OUR MONTHLY SURVEY)

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)

