

BESPOKE SURVEYS

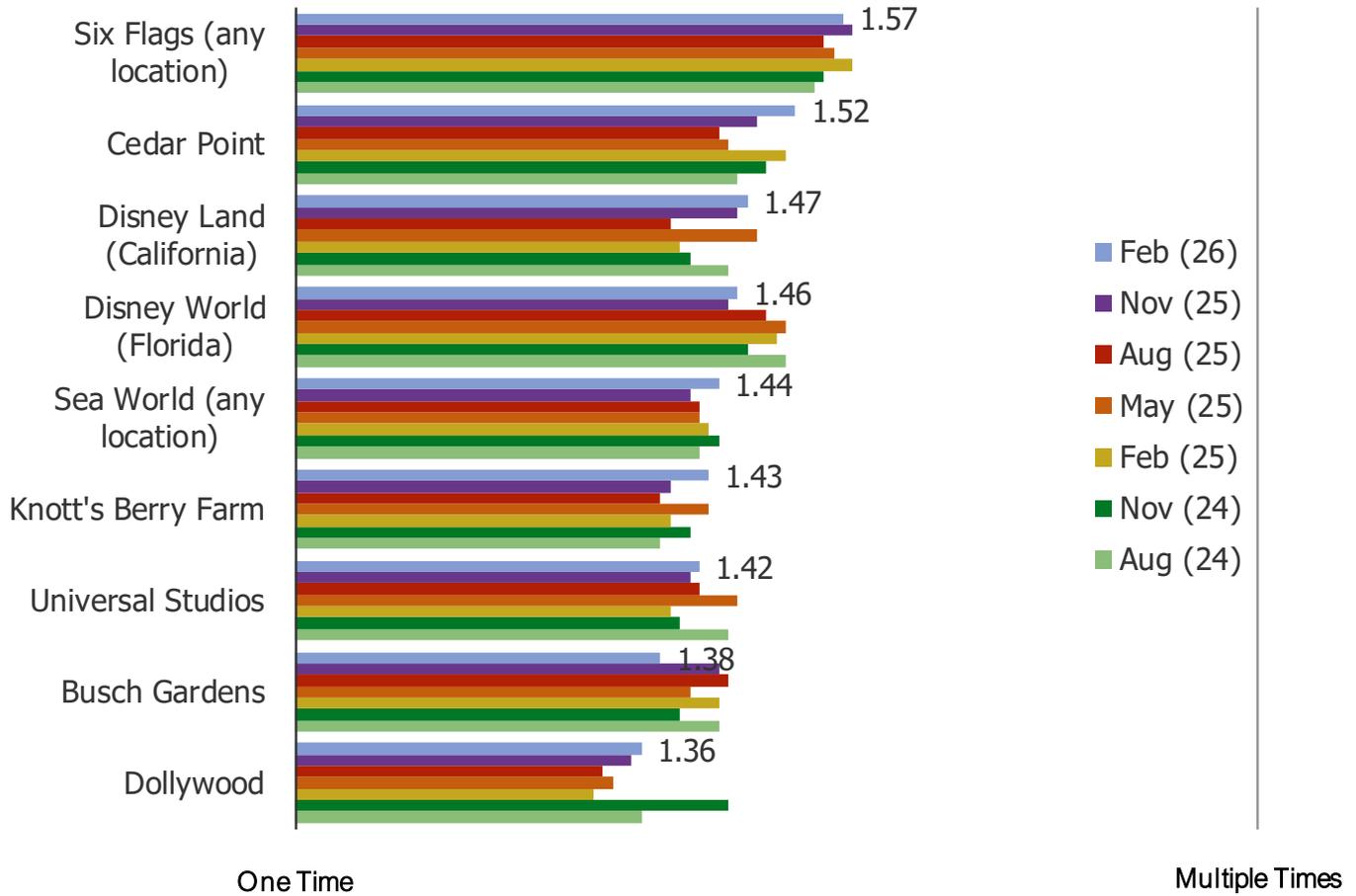
## Theme Parks and Cruises | Vol 13

1,000 US Consumers Balanced to Census  
Tickers Covered: DIS, SIX, FUN, SEAS

FEBRUARY 2026

HOW MANY TIMES HAVE YOU TAKEN TRIPS TO THE FOLLOWING OVER THE YEARS?

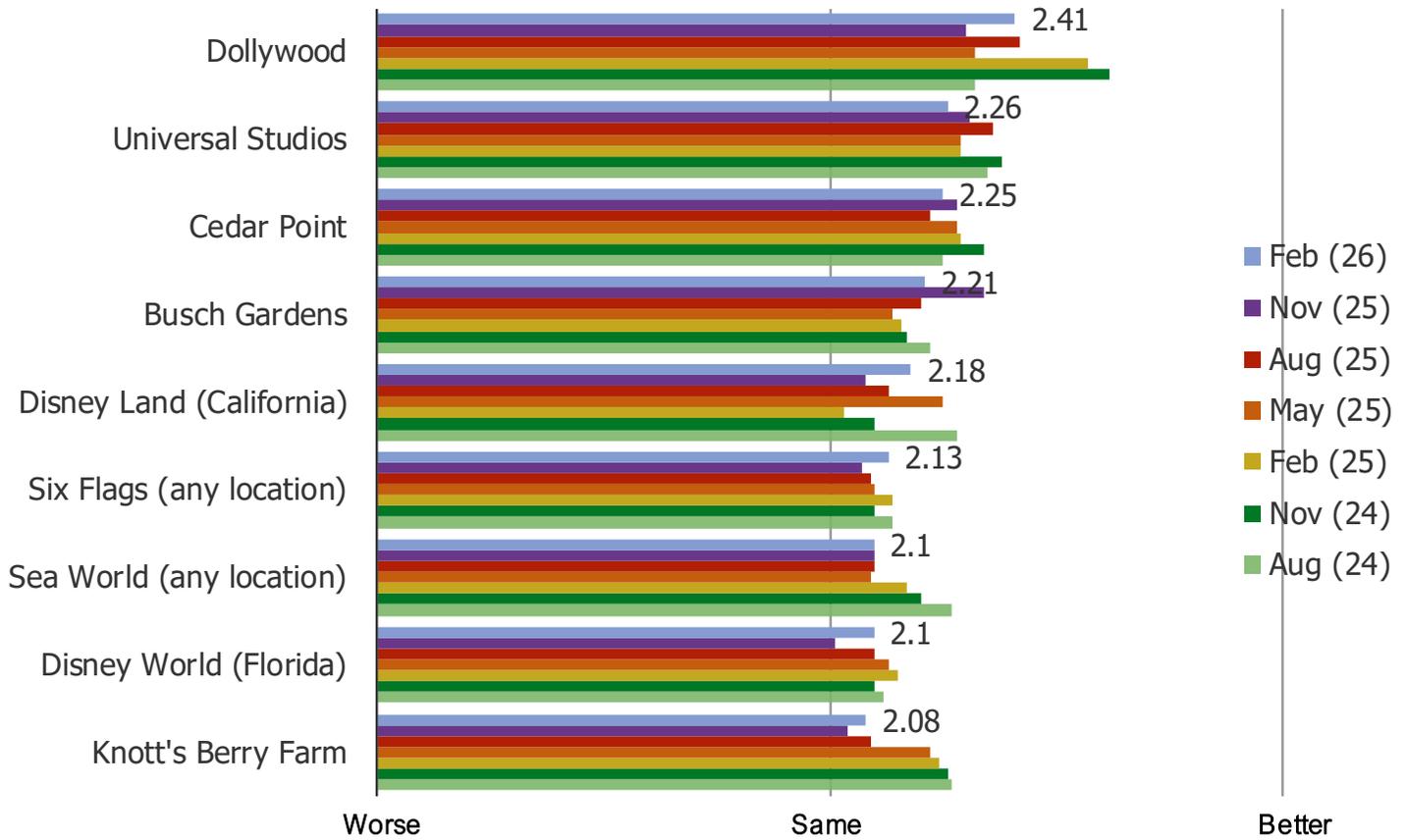
Posed to all respondents who have visited each of the below...



	N=
Busch Gardens	182
Cedar Point	107
Disney Land (California)	222
Disney World (Florida)	382
Dollywood	113
Knott's Berry Farm	123
Sea World (any location)	296
Six Flags (any location)	346
Universal Studios	313

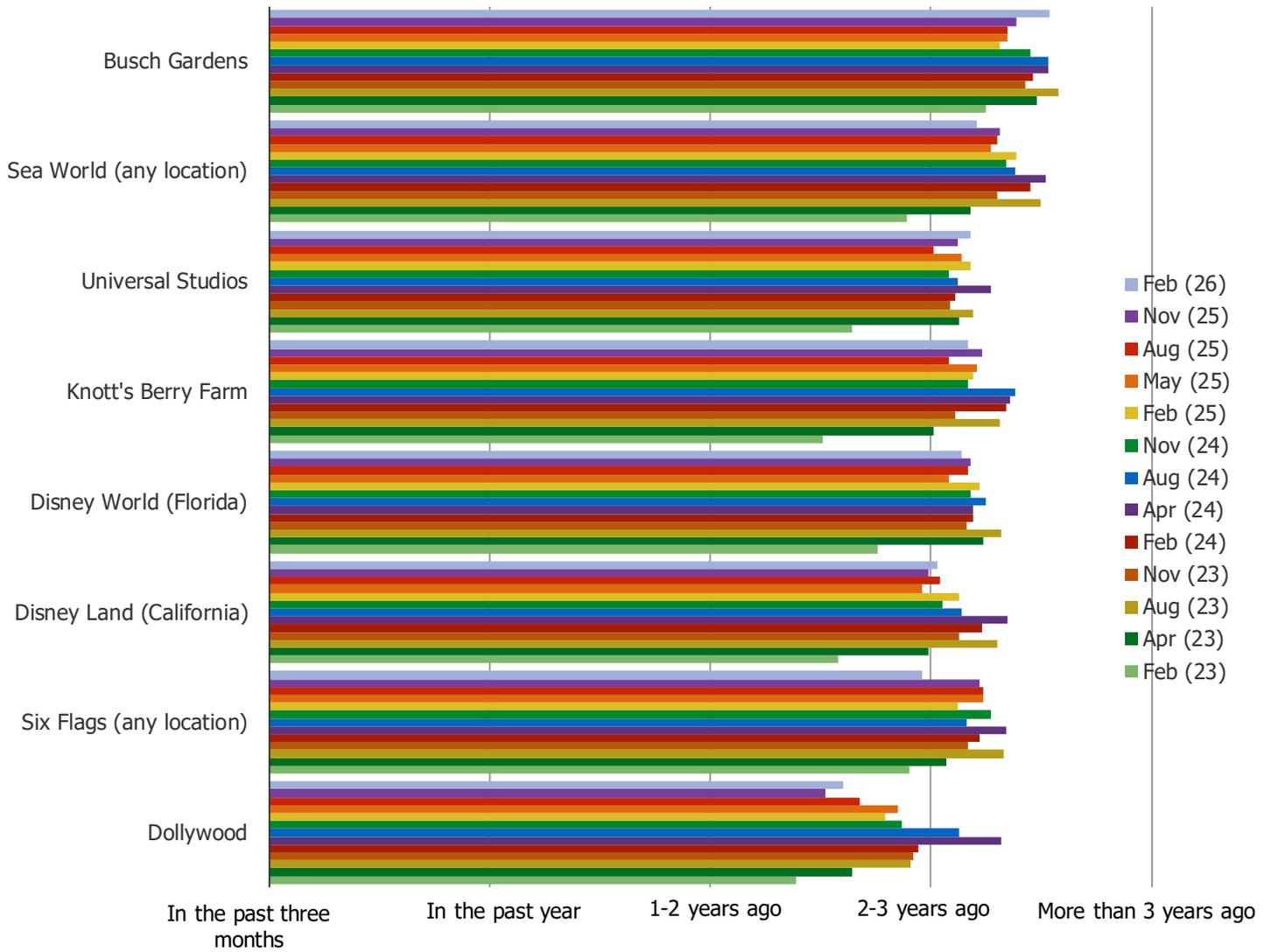
YOU MENTIONED THAT YOU HAVE TAKEN VISITS TO THE FOLLOWING MULTIPLE TIMES. IN YOUR OPINION, HAS THE EXPERIENCE GOTTEN BETTER OR WORSE VISITING THE FOLLOWING OVER TIME?

Posed to respondents who have visited each of the below multiple times...



WHEN DID YOU MOST RECENTLY VISIT THIS THEME PARK?

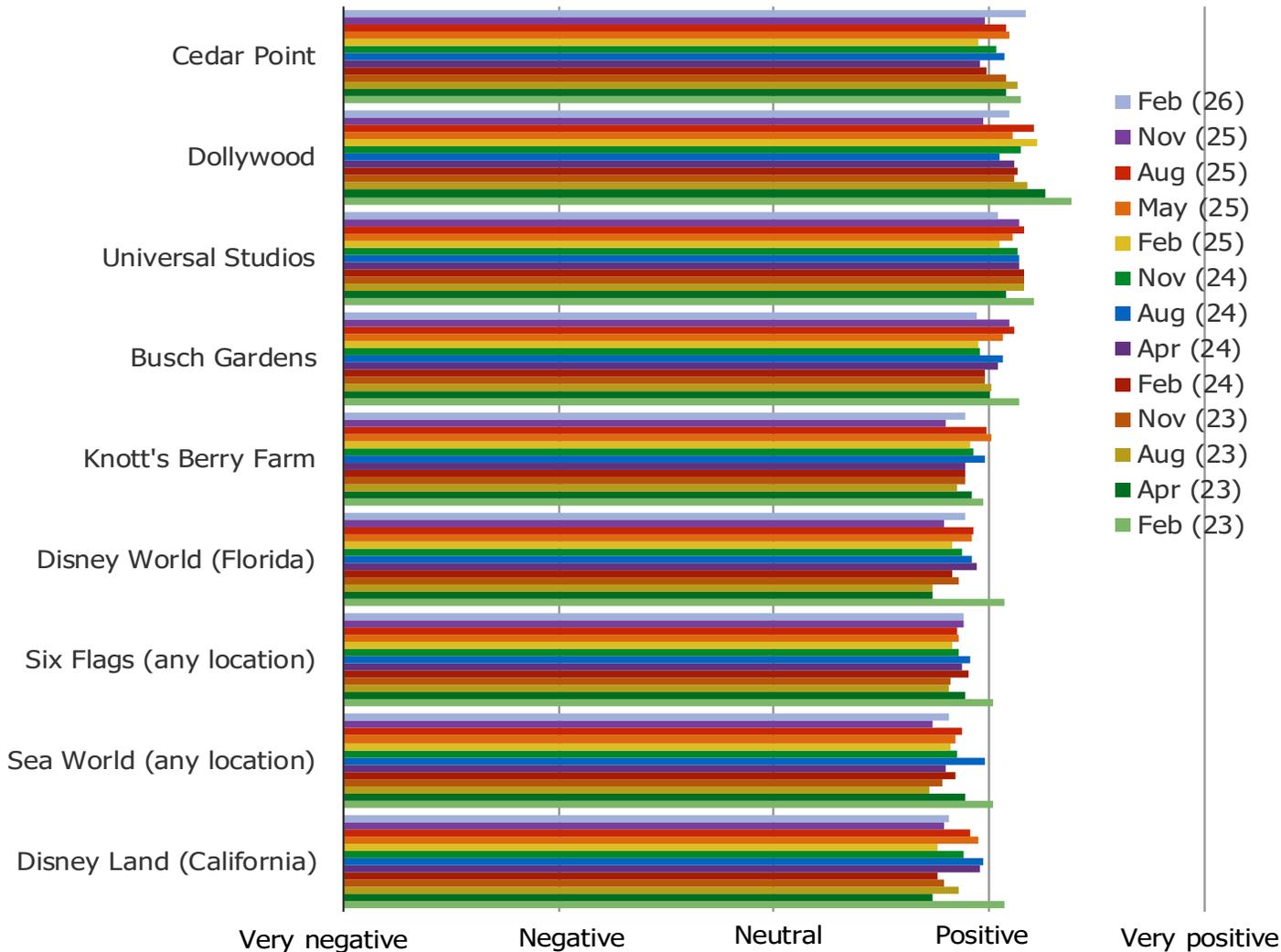
Posed to all respondents who have visited each of the below.



← More Recent

WHAT IS YOUR OPINION OF THE FOLLOWING:

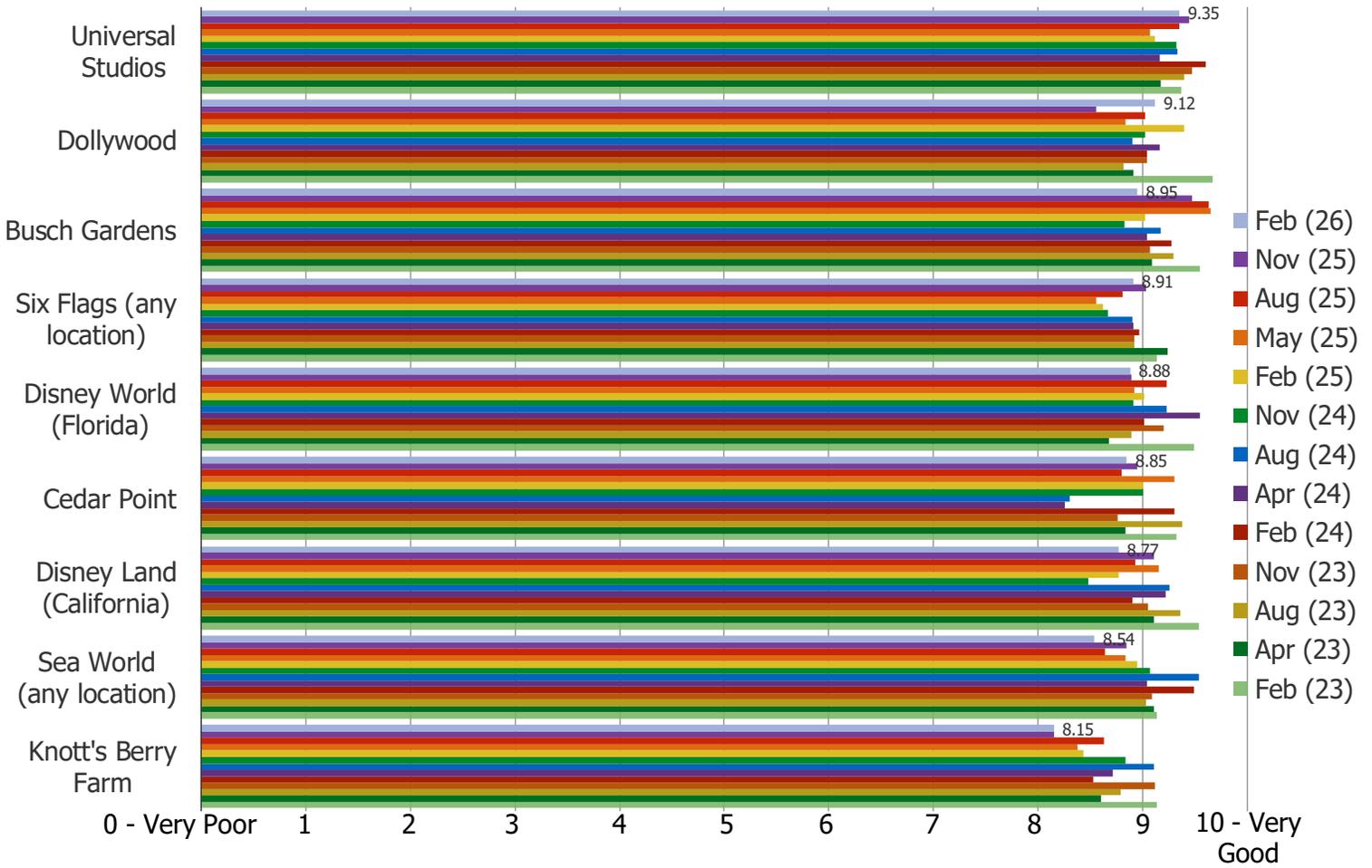
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THINKING ABOUT YOUR MOST RECENT VISIT, HOW WOULD YOU RATE THE EXPERIENCE YOU HAD IN THE THEME PARK?

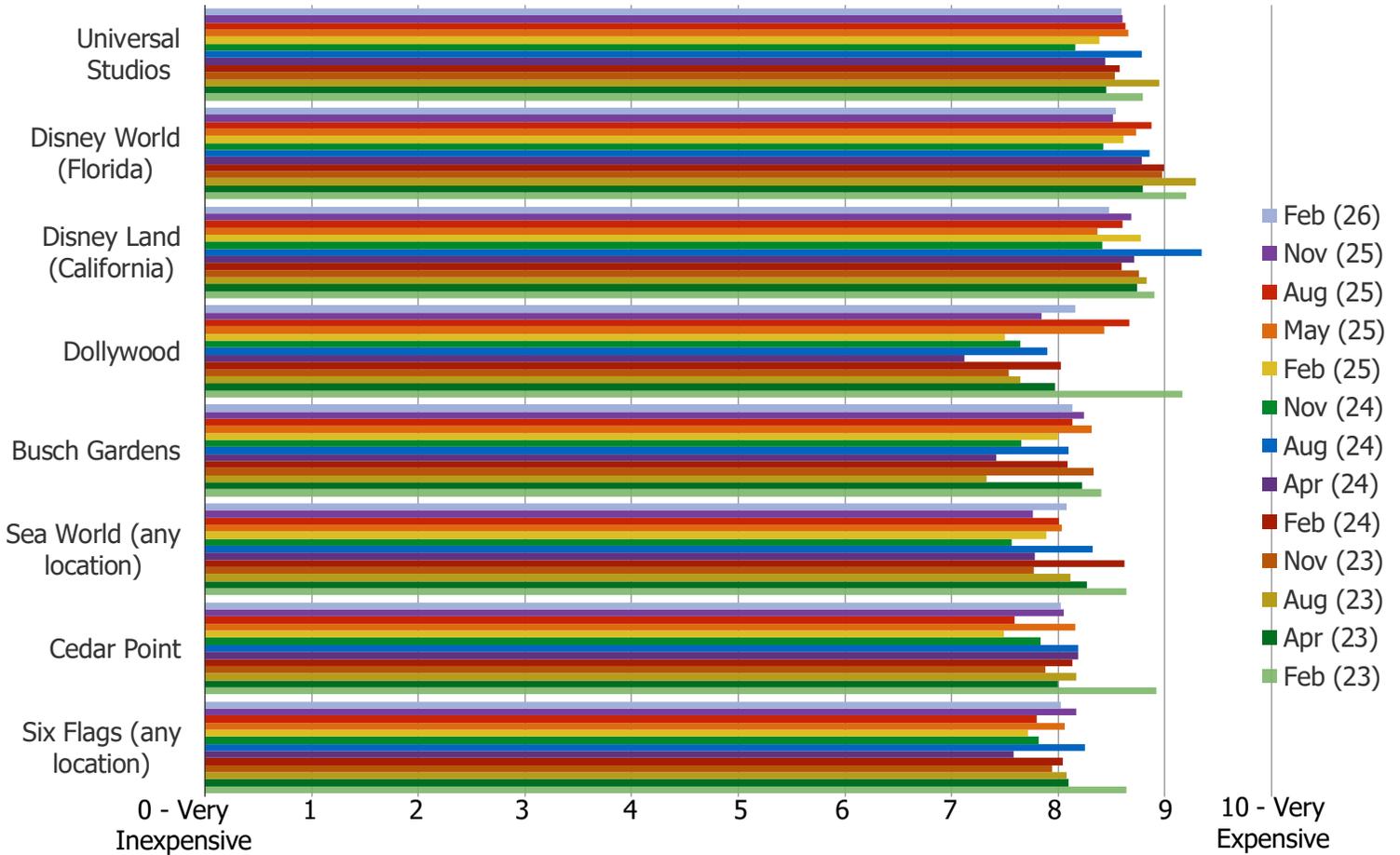
Posed to all respondents who have visited the below most recently in the past three years.



	N=
Disney World (Florida)	145
Disney Land (California)	84
Six Flags (any location)	147
Universal Studios	115
Sea World (any location)	100
Cedar Point	59
Knott's Berry Farm	46
Dollywood	69
Busch Gardens	38

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

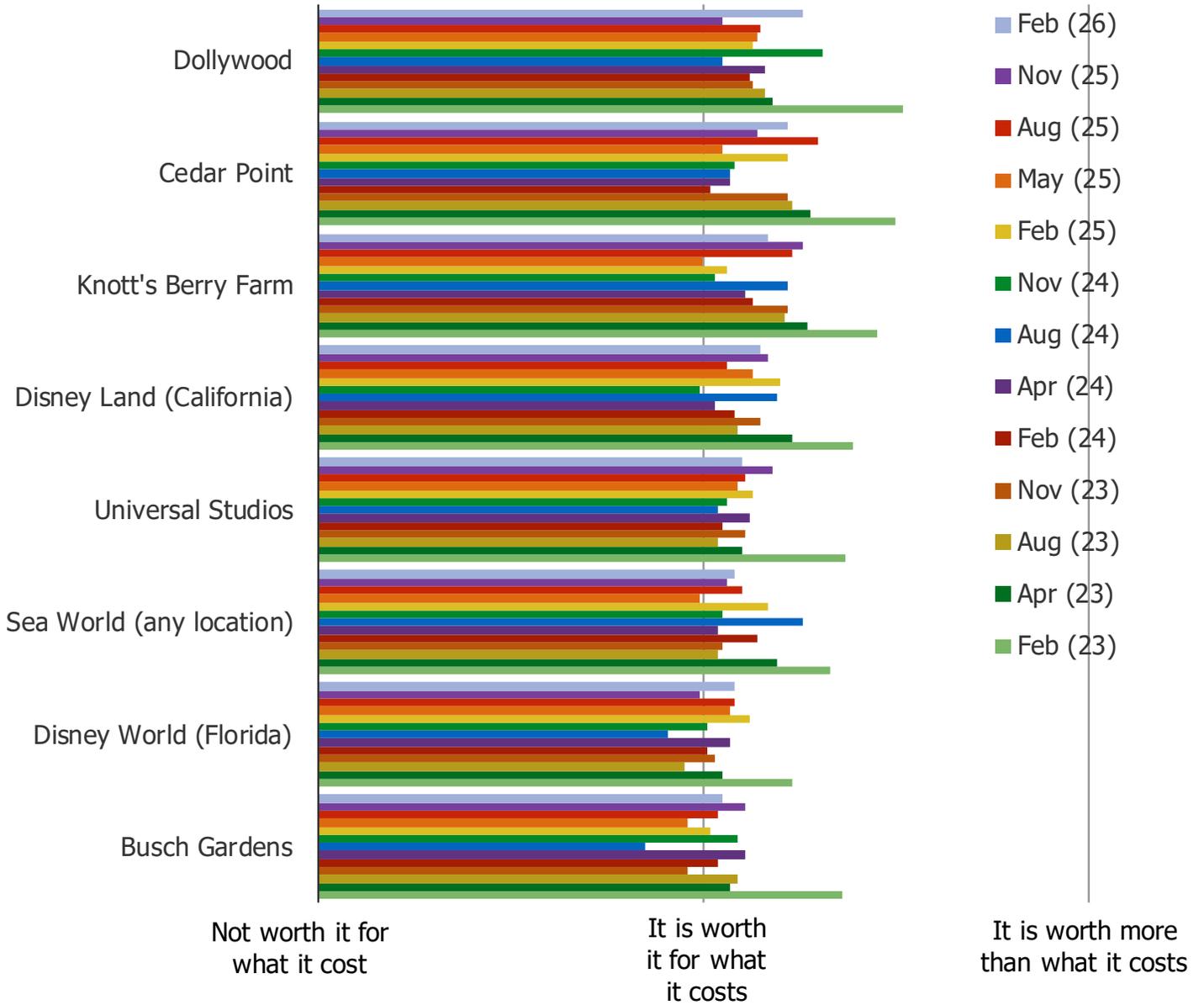
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IN YOUR OPINION, HOW WORTH IT IS THE EXPERIENCE FOR THE PRICE THAT IT COST TO VISIT THE THEME PARK?

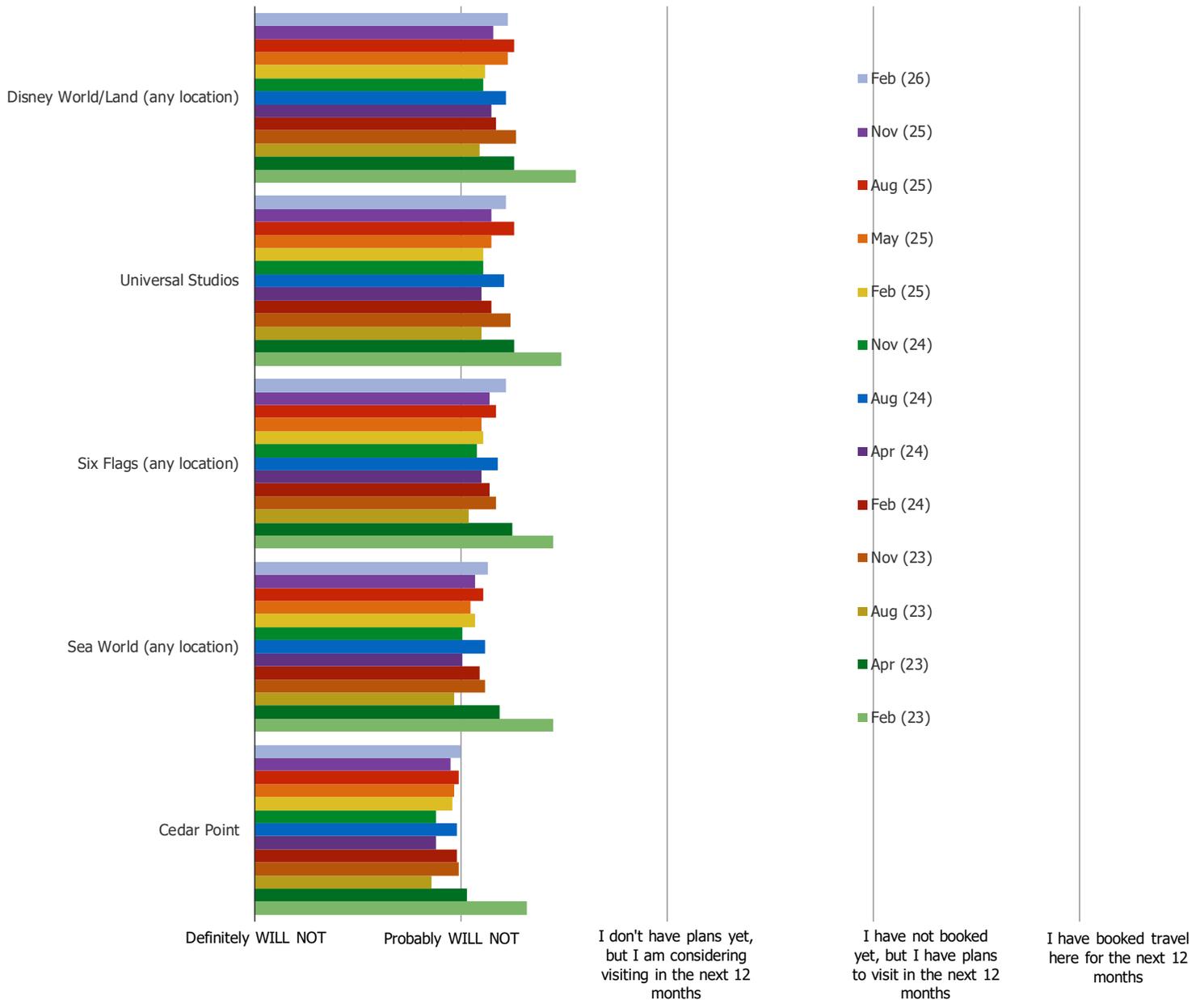
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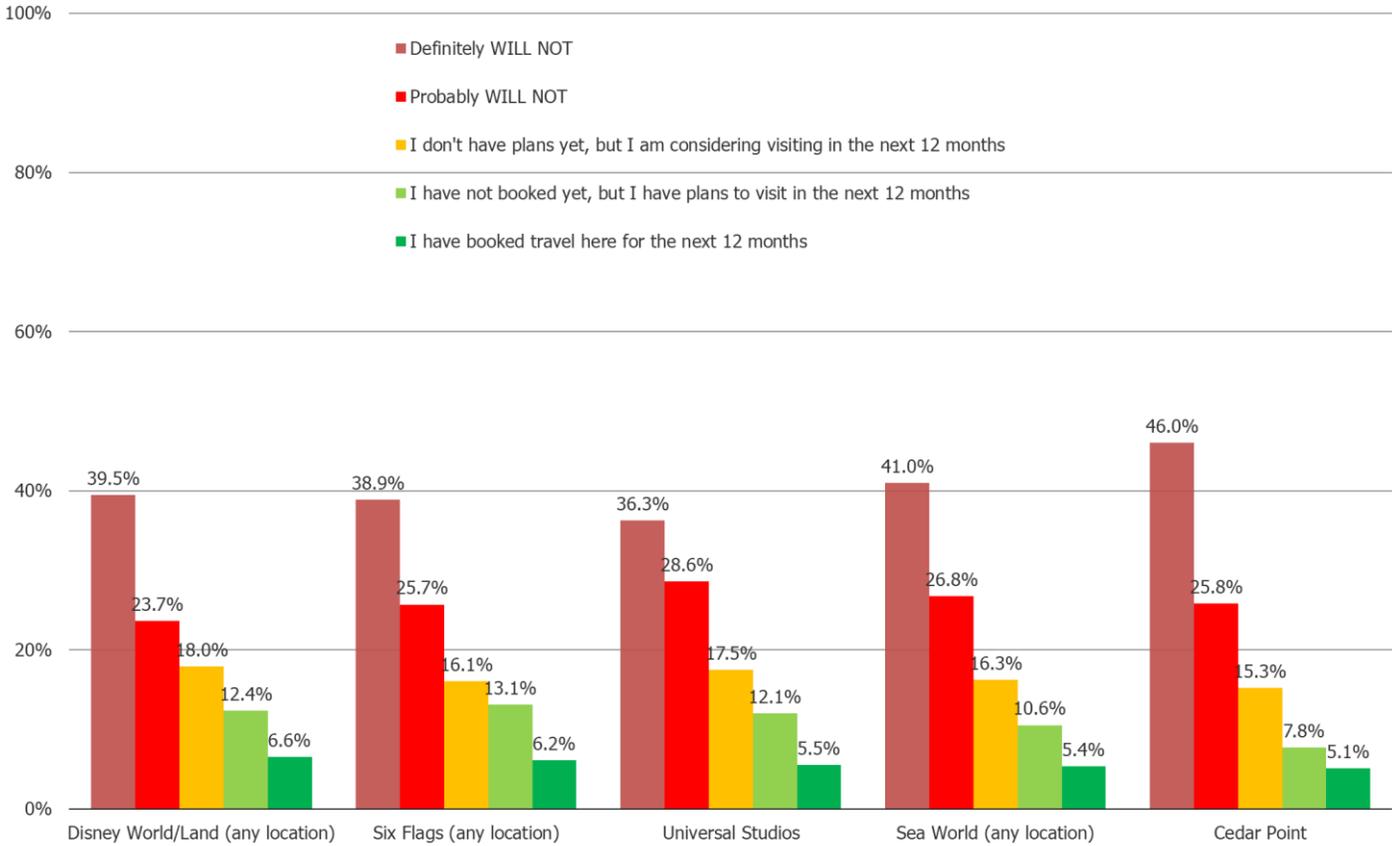
HOW LIKELY ARE YOU TO VISIT THE FOLLOWING IN THE NEXT 12 MONTHS...?

Posed to all respondents.



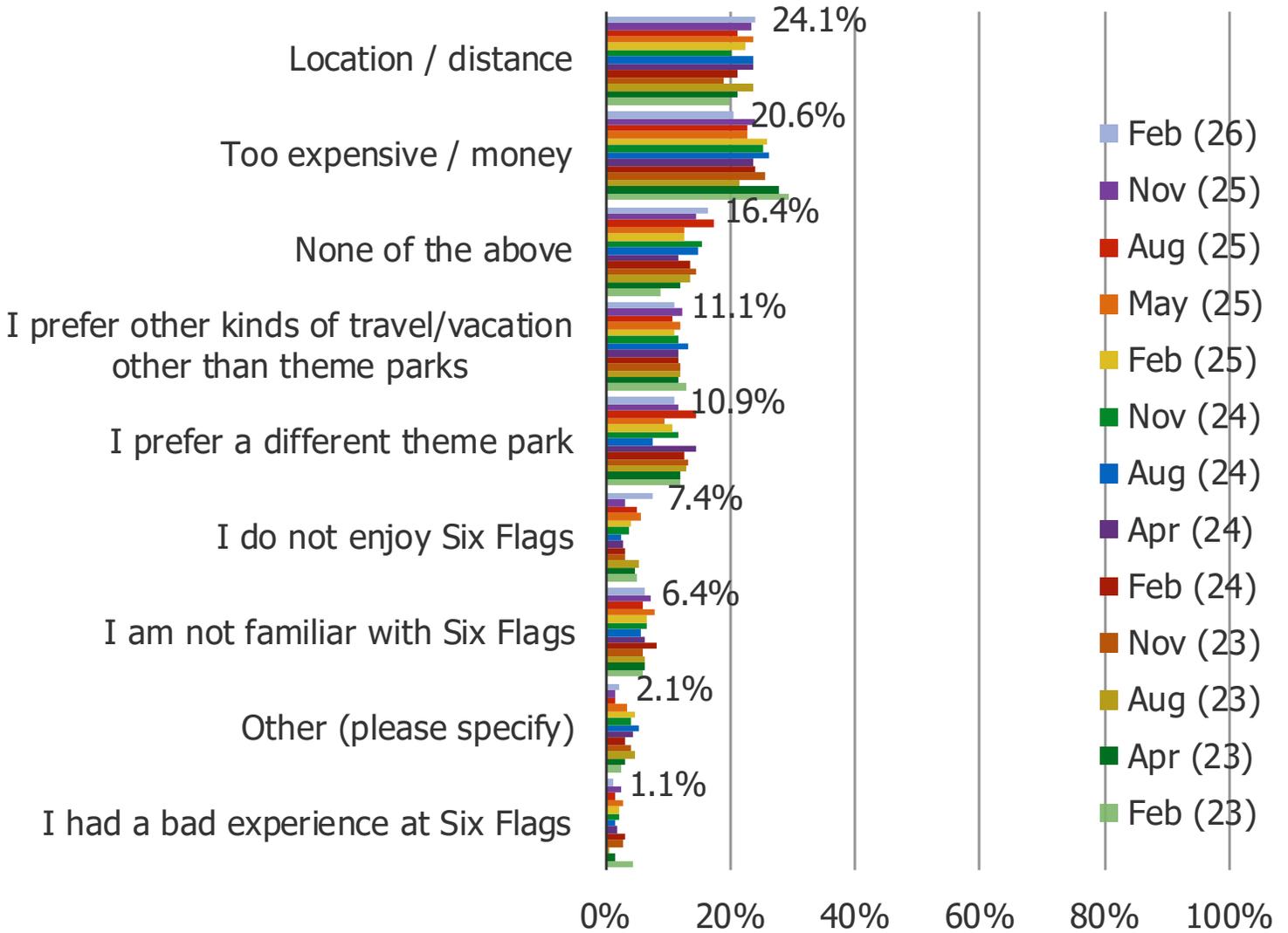
HOW LIKELY ARE YOU TO VISIT THE FOLLOWING THEME PARKS IN THE NEXT 12 MONTHS?

Posed to all respondents.



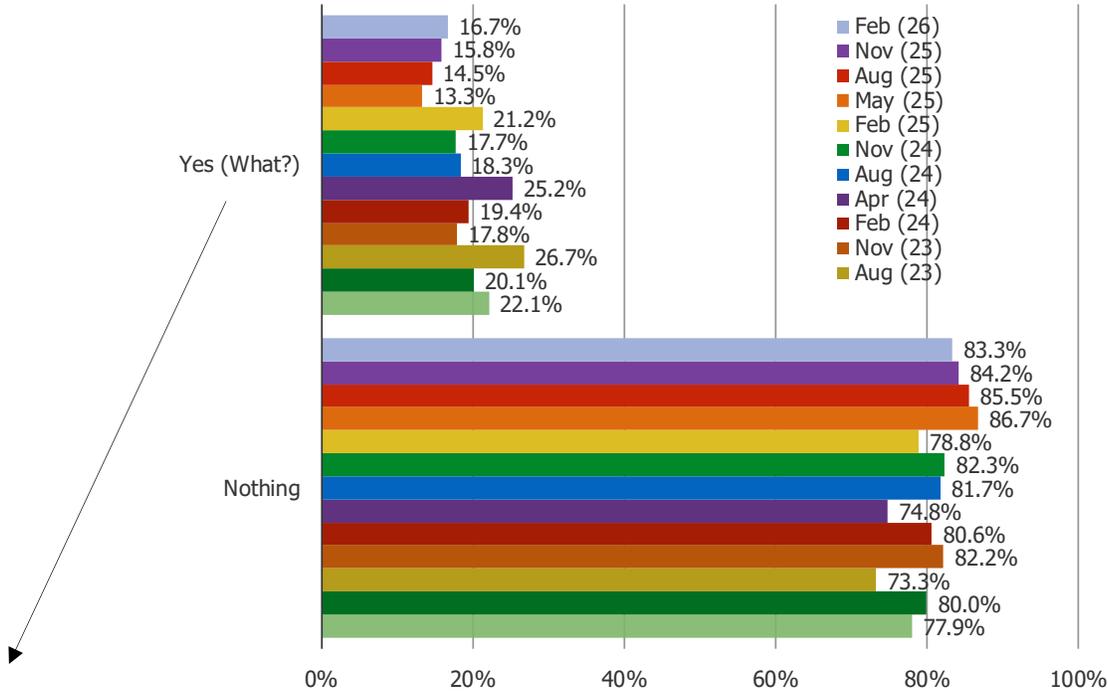
WHAT IS THE PRIMARY REASON YOU ARE NOT VISITING A SIX FLAGS THEME PARK IN THE NEXT 12 MONTHS?

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



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.

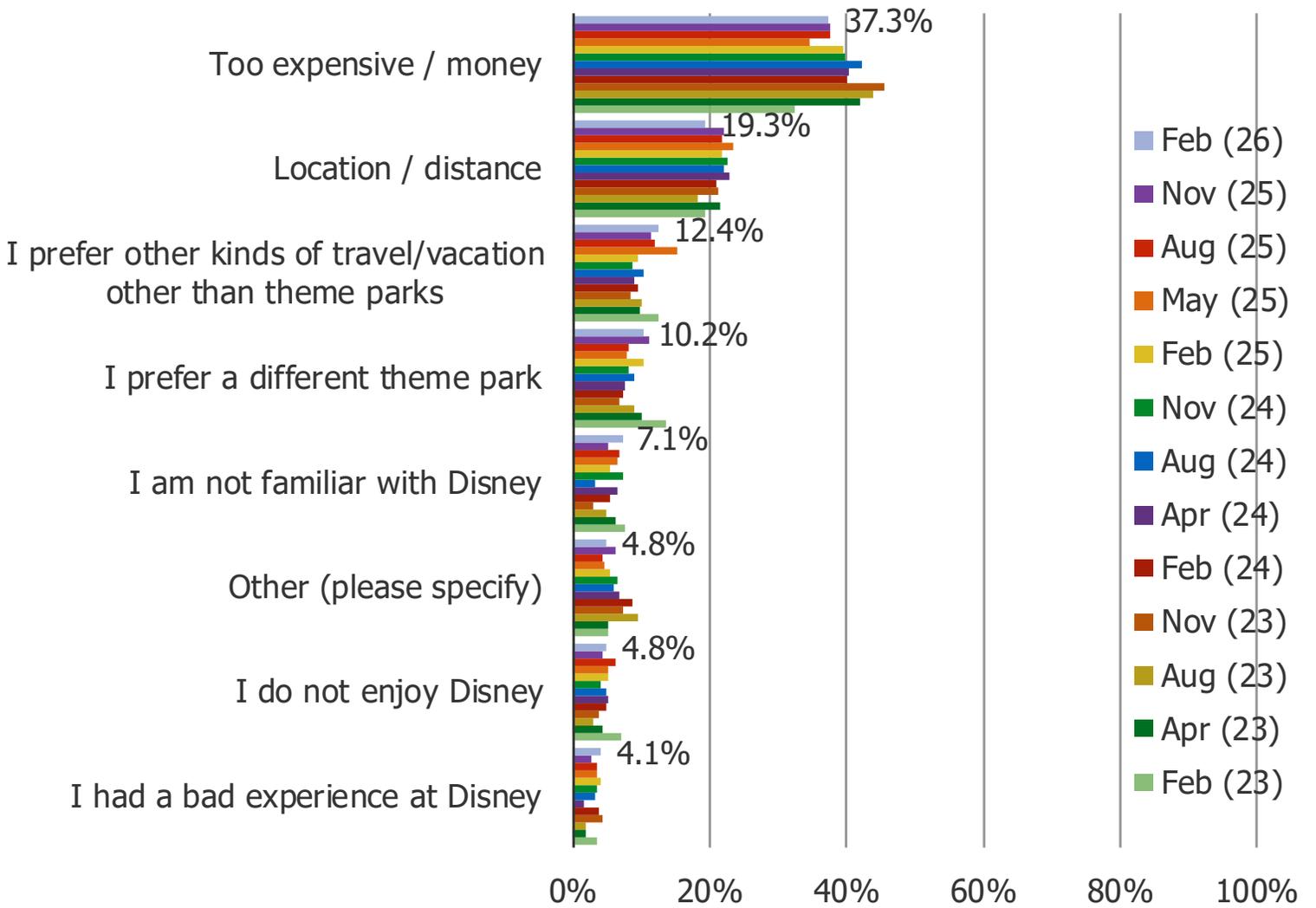


Trailing 4-Quarters Ending In...	2023Q4	2024Q1	2024Q2	2024Q3	2024Q4	2025Q1	2025Q2	2025Q3	2025Q4	2026Q1	R-Squared	P-Value	Trend
Lower Prices, Deals & Discounts	29.63%	34.83%	37.04%	41.34%	39.15%	36.01%	34.30%	32.03%	37.93%	40.45%	0.12	0.327	Up
Rides, Coasters & New Attractions	16.05%	20.69%	21.21%	19.79%	22.06%	19.93%	17.77%	16.02%	12.07%	12.27%	0.43	0.039	DOWN
General Fun & Experiences	11.42%	7.59%	7.74%	7.07%	6.76%	7.34%	6.61%	9.52%	7.33%	6.36%	0.216	0.176	Down
Closer Location / Convenience	5.25%	5.52%	6.73%	6.36%	6.05%	8.39%	7.85%	6.93%	6.03%	4.09%	0	0.97	Up
Family, Friends & Kids	5.86%	5.17%	3.70%	3.53%	4.63%	5.59%	4.96%	5.19%	3.88%	3.18%	0.161	0.25	Down
Weather, Season & Operating Hours	2.16%	2.41%	2.36%	1.41%	1.78%	2.10%	3.31%	3.46%	3.45%	3.18%	0.483	0.026	UP
Food & Drink	2.78%	1.72%	1.68%	2.12%	1.78%	1.05%	1.24%	0.87%	1.72%	2.73%	0.051	0.531	Down
Events, Themes & Atmosphere	2.16%	2.41%	2.02%	1.06%	1.42%	1.40%	2.48%	2.60%	1.72%	3.18%	0.105	0.361	Up
Shorter Lines & Less Crowded	0.62%	1.03%	1.68%	1.41%	1.07%	1.40%	0.83%	0.87%	2.16%	2.27%	0.321	0.088	Up

- **Price is king:** Lower prices, deals, and discounts are overwhelmingly the #1 driver for attendance (~35%). New rides are losing pull:
- **Demand for new coasters and attractions is steadily declining** (statistically significant). Operations matter more now:
- **Requests for better weather and longer operating hours are rising** (statistically significant).
- **Line fatigue is growing:** The demand for shorter lines and less crowded parks is trending upward.
- **IP is not a major draw:** Themed events and intellectual property (e.g., Batman, Looney Tunes) do not drive significant interest (~2%).

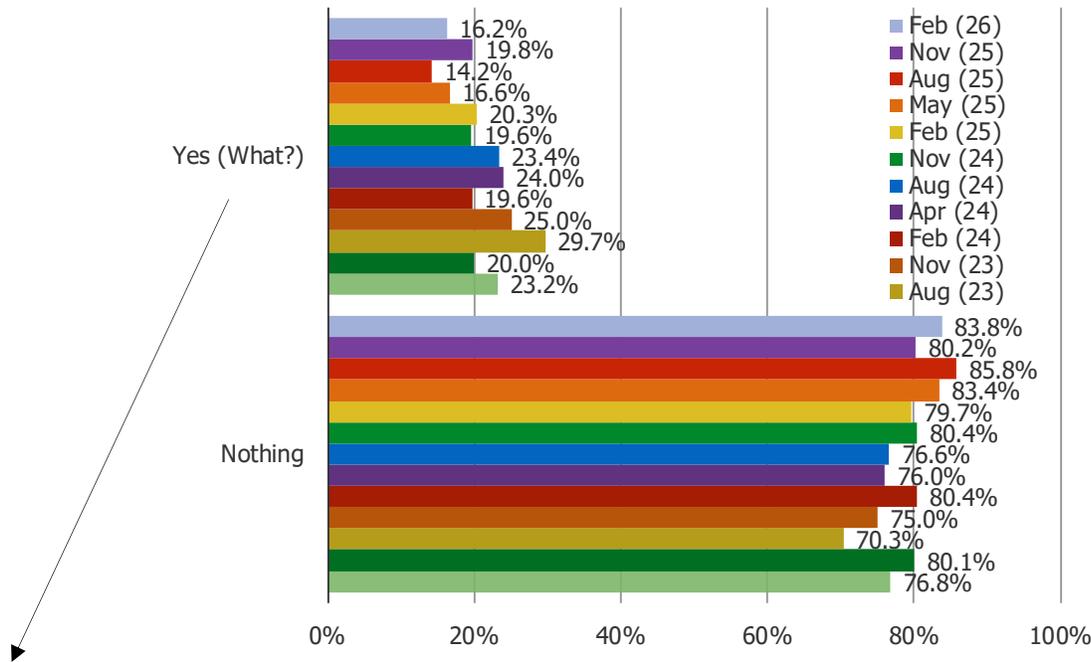
WHAT IS THE PRIMARY REASON YOU ARE NOT VISITING A DISNEY THEME PARK IN THE NEXT 12 MONTHS?

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.

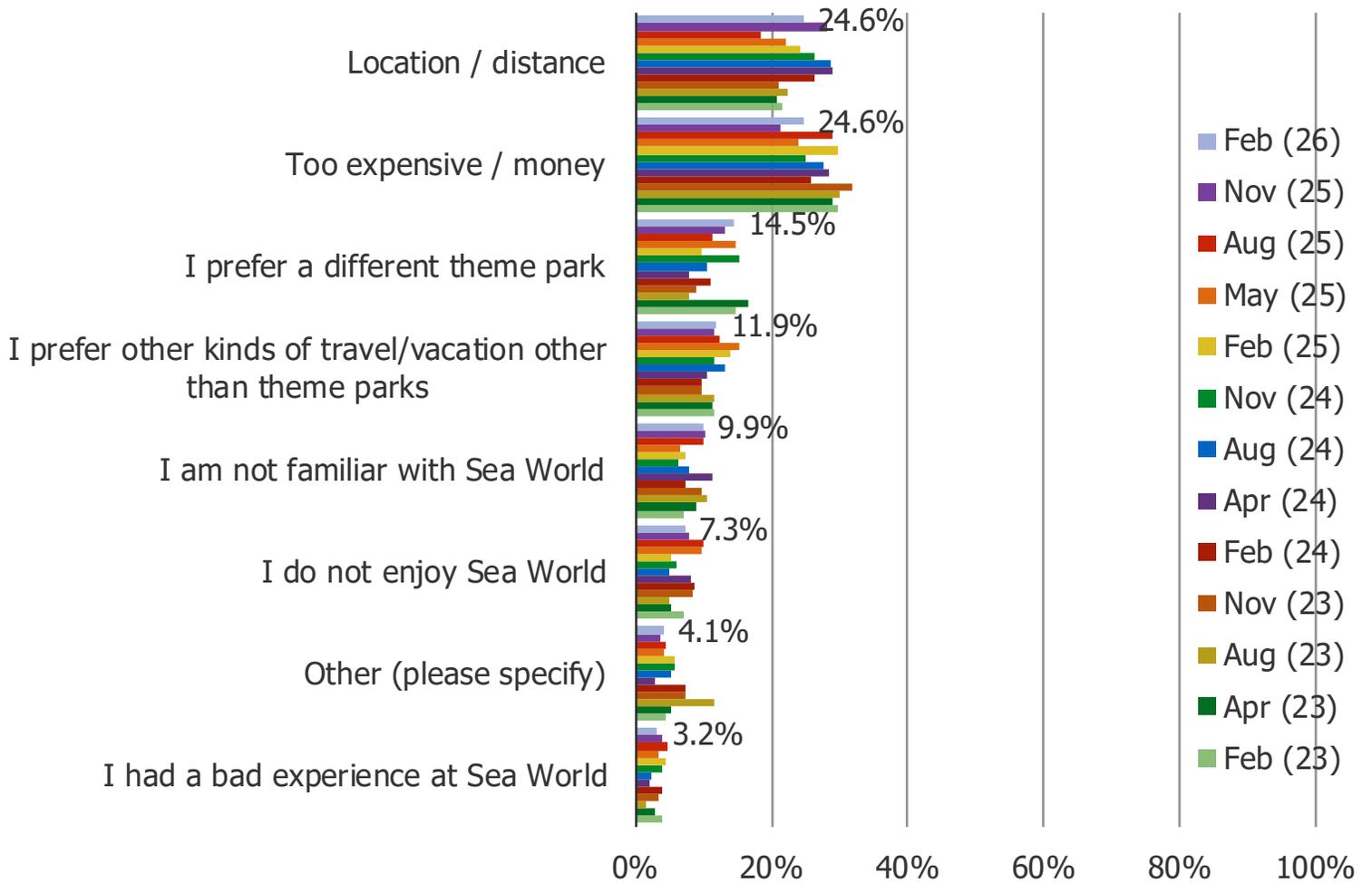


Trailing 4-Quarters Ending In...	2023Q4	2024Q1	2024Q2	2024Q3	2024Q4	2025Q1	2025Q2	2025Q3	2025Q4	2026Q1	R-Squared	P-Value	Trend
Lower Prices, Deals & Discounts	46.58%	55.46%	58.29%	59.89%	60.99%	57.28%	54.21%	49.81%	51.66%	53.85%	0.01	0.788	Down
General Fun & Experiences	16.46%	10.92%	10.22%	9.32%	6.50%	7.12%	7.41%	9.89%	8.86%	9.23%	0.319	0.089	Down
Rides, Shows & Attractions	6.84%	7.00%	6.35%	6.78%	6.81%	6.81%	6.73%	5.32%	3.69%	3.85%	0.632	0.006	DOWN
Family, Friends & Kids	5.82%	6.16%	6.35%	5.37%	5.88%	7.12%	6.06%	7.60%	5.54%	4.23%	0.032	0.619	Down
Characters, Specific IP & Magic	3.54%	2.80%	3.31%	2.82%	3.72%	4.33%	3.37%	4.56%	4.06%	3.08%	0.159	0.254	Up
Closer Location / Convenience	2.28%	2.52%	3.59%	3.39%	2.79%	3.10%	2.69%	2.28%	2.58%	2.69%	0.031	0.627	Down
Weather, Season & Time	0.51%	0.56%	0.55%	0.85%	0.62%	0.62%	1.35%	1.90%	1.85%	3.08%	0.753	0.001	UP
Food & Drink	0.76%	0.28%	0.00%	0.00%	0.00%	0.31%	0.34%	0.76%	1.11%	1.15%	0.355	0.069	Up
Less Political / Anti-'Woke'	1.01%	0.84%	1.10%	0.56%	0.62%	0.62%	0.00%	0.00%	0.00%	0.00%	0.844	0	DOWN
Shorter Lines & Less Crowded	0.25%	0.56%	0.28%	0.56%	0.62%	0.31%	0.34%	0.00%	0.37%	0.38%	0.065	0.477	Down

- **Price is the ultimate barrier:** Over half of all respondents (~53%) cite lower prices and discounts as their primary requirement to visit—far higher than Six Flags.
- **The "culture war" is over:** Objections to Disney being "woke" or too political have completely vanished from the dataset (statistically significant).
- **Attractions are losing pull:** Just like Six Flags, the demand for physical rides and shows is steadily declining (statistically significant).
- **Weather and comfort matter more now:** Consumer demands for better weather and seasonal timing are sharply increasing (statistically significant).

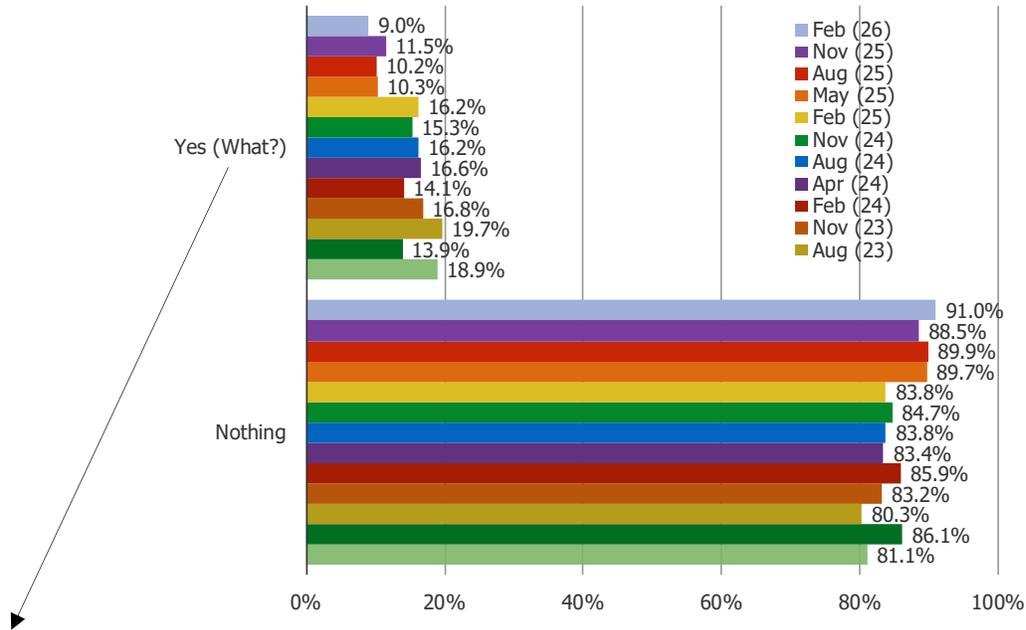
WHAT IS THE PRIMARY REASON YOU ARE NOT VISITING A SEA WORLD THEME PARK IN THE NEXT 12 MONTHS?

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.

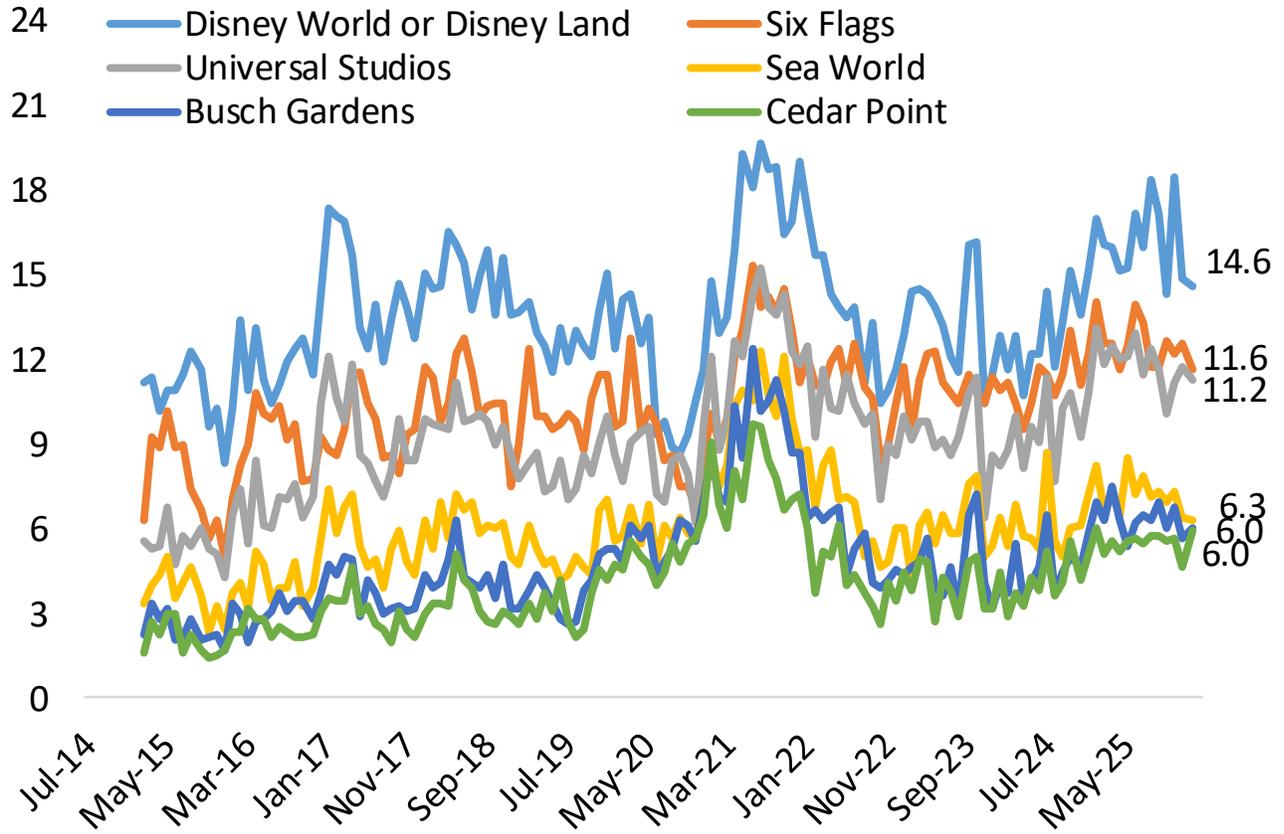


Trailing 4-Quarters Ending In...	2023Q4	2024Q1	2024Q2	2024Q3	2024Q4	2025Q1	2025Q2	2025Q3	2025Q4	2026Q1	R-Squared	P-Value	Trend
Lower Prices, Deals & Discounts	26.56%	33.33%	34.48%	38.83%	41.75%	38.92%	42.39%	42.59%	42.04%	44.44%	0.802	0.00%	UP
General Fun & Experiences	22.41%	15.20%	12.81%	12.14%	10.82%	13.79%	15.22%	16.05%	12.74%	9.63%	0.288	0.11	Down
Animals, Marine Life & Exhibits	7.47%	9.80%	11.33%	8.25%	7.73%	8.87%	6.52%	8.64%	9.55%	7.41%	0.067	0.471	Down
Closer Location / Convenience	8.71%	10.78%	10.34%	10.19%	8.25%	6.90%	6.52%	3.70%	3.18%	3.70%	0.823	0	DOWN
Family, Friends & Kids	5.81%	7.35%	6.40%	5.34%	5.15%	5.42%	4.89%	5.56%	5.73%	6.67%	0.046	0.551	Down
Rides, Coasters & Attractions	2.90%	2.94%	3.94%	3.88%	3.61%	3.45%	2.17%	1.85%	1.91%	3.70%	0.127	0.312	Down
Weather, Season & Time	3.32%	3.92%	3.94%	3.40%	2.58%	1.48%	1.09%	1.23%	0.64%	2.22%	0.659	0.004	DOWN
Food & Merchandise	2.90%	1.96%	1.48%	1.46%	1.55%	0.99%	1.09%	0.62%	0.00%	0.00%	0.907	0	DOWN
Shows, Events & Entertainment	1.24%	1.47%	0.49%	0.00%	0.00%	0.49%	0.54%	0.62%	1.27%	0.74%	0.013	0.754	Down
Better Animal Welfare	0.41%	0.49%	0.99%	0.49%	1.03%	0.99%	0.54%	0.62%	0.00%	0.00%	0.19	0.208	Down

- **Price Sensitivity is Soaring (Statistically Significant):** Lower Prices & Discounts are overwhelmingly the #1 requirement for attendance, and this demand is growing rapidly (\$p = 0.000\$). In late 2023, 26% of respondents cited price. By early 2026, it nearly doubled to 44.4%.
- **The "Blackfish Effect" is Non-Existent:** There is almost zero top-of-mind consumer objection to animal captivity. Mentions of animal welfare, cruelty, or releasing the whales account for less than 1% of the data across all periods, and the trend is flat-to-down.
- **Marine Life Easily Beats Coasters:** Despite SeaWorld's heavy recent investments in roller coasters, consumers still view it as a marine park. They cite Animals, Marine Life & Exhibits as a reason to visit at more than double the rate of Rides & Coasters (8.0% vs. 3.4%).
- **Location/Travel is Becoming Less of a Barrier (Statistically Significant):** The share of people saying "if it was closer to me" has dropped steadily and significantly (\$p = 0.000\$), falling from 10.8% to 3.7%.

MONTHLY SURVEY – THEME PARK VISIT INTENTIONS TRACKER

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



Note: Latest Datapoint is January 2026