

# Understanding the Data: A Breakdown of Attractions Industry Visitor Trends

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# About Hotel & Leisure Advisors



Hospitality consulting firm specializing in feasibility studies, appraisals, economic impact studies, operational reviews, and market research for:

- Hotels and Resorts
- Water Parks
- Amusement Parks
- Family Entertainment Centers
- Other Leisure Real Estate

# About Placer.ai



Placer.ai is a location intelligence company that provides businesses and public organizations with data-driven insights into foot traffic patterns and consumer behavior.

By analyzing anonymized mobile location data, Placer.ai helps users understand visitation trends, trade areas, and demographics, enabling more informed decisions across various sectors.



# Interpreting the Data

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# How Placer.ai Works

Observe. Analyze. Present.



For any location in the U.S., Placer.ai observes a portion of the visiting customers. Akin to a statistical survey, this observed data is aggregated and used to generate insights into any venue. Placer.ai then extrapolates a range of metrics that provide visibility into consumer behavior.

## 01 - Observe

Anonymized location data from tens of millions of mobile devices used as a core panel.

- Visitation Trends
- Trade Area Analysis
- Customer Demographics

## 02 - Analyze

Accurate and reliable estimations on activity across the entire U.S. population.

- Extrapolated Panel Data
- Normalized & Debiased
- "Ground Truth" Validated

## 03 - Present

A wealth of detailed reports containing critical insights into what is truly happening offline.

- 30M Active Devices
- 1.5B Monthly Retail Visits
- 500 Mobile Apps w/ SDK

# Segments Analyzed



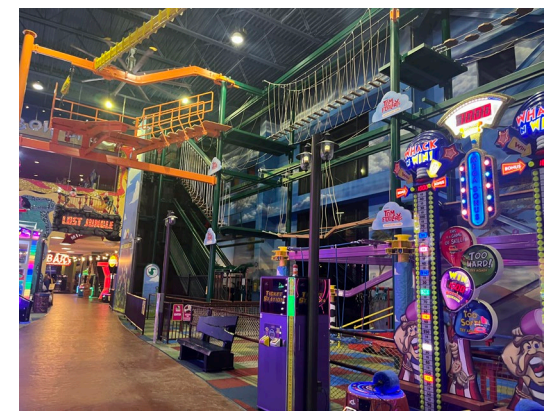
**Indoor Water Parks**



**Outdoor Water Parks**



**Theme Parks**



**Family Entertainment Centers**

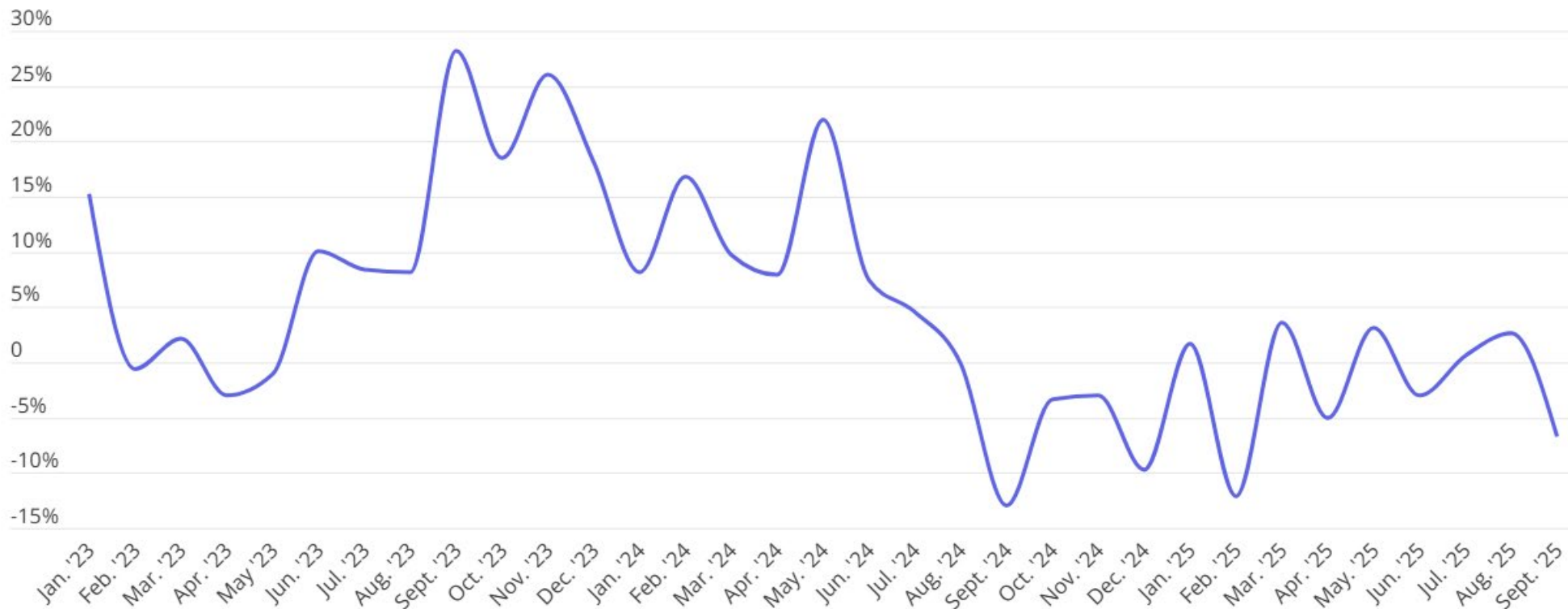
# Indoor Water Parks

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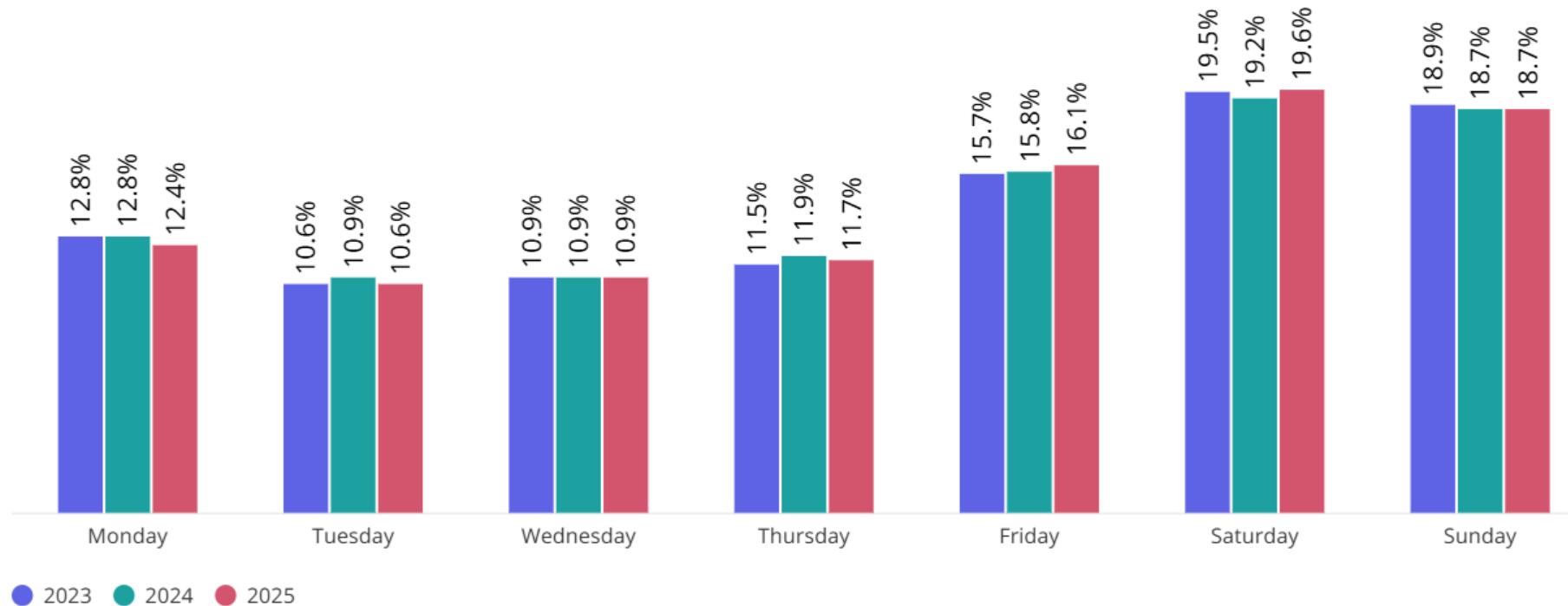
# Indoor Water Parks & Resorts Face Deceleration of Visits

## 📍 Change in Monthly Visits to Top U.S. Indoor Water Parks & Resorts



# Visitors More Likely to Attend on Fridays & Saturdays than Years Prior

📍 Distribution of Visits by Day of the Week to Top U.S. Indoor Water Parks



# Indoor Water Parks See Increase in Visits by Rural & Blue Collar Consumers

📍 Distribution of Visits by Consumer Segment to Top U.S. Indoor Water Parks



# Indoor Water Parks – Shifting the Guest Mix

- After strong recovery, visitation has leveled off, with lower usage levels for the grouping in 2025.
- Fridays and Saturdays remain key attendance days, reflecting short leisure getaways.
- Operators can adapt with flexible pricing, off-peak programming, and loyalty incentives.



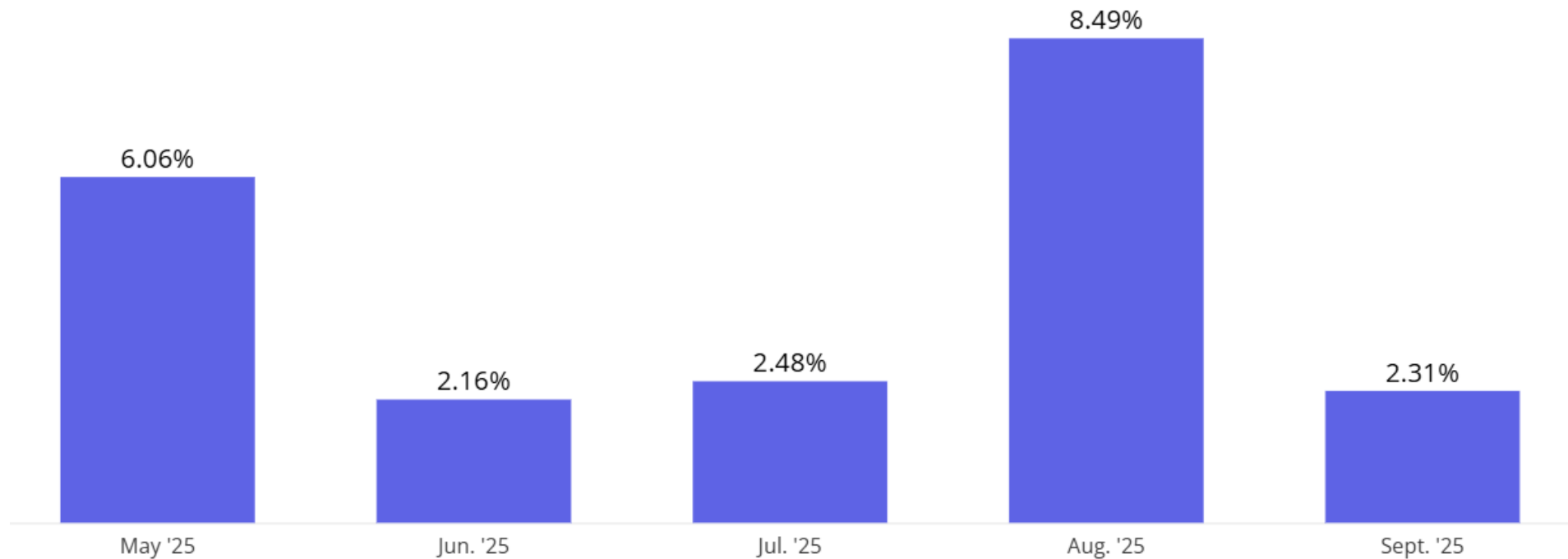
# Outdoor Water Parks

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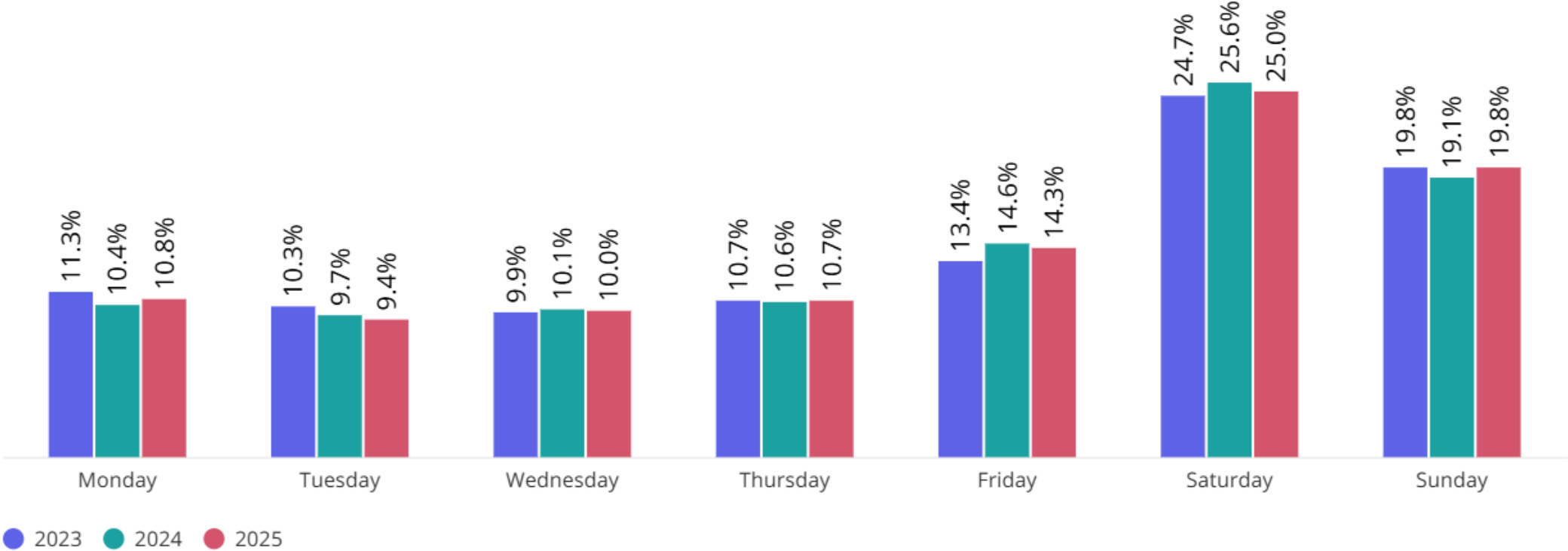
# Outdoor Water Parks Add Traffic in 2025

📍 Change in Monthly Visits to Top U.S. Outdoor Water Parks, <10 Minutes in Duration



# Extended Weekend Visits May Be a Trend

📍 Distribution of Visits by Day of the Week to Top U.S. Outdoor Water Parks



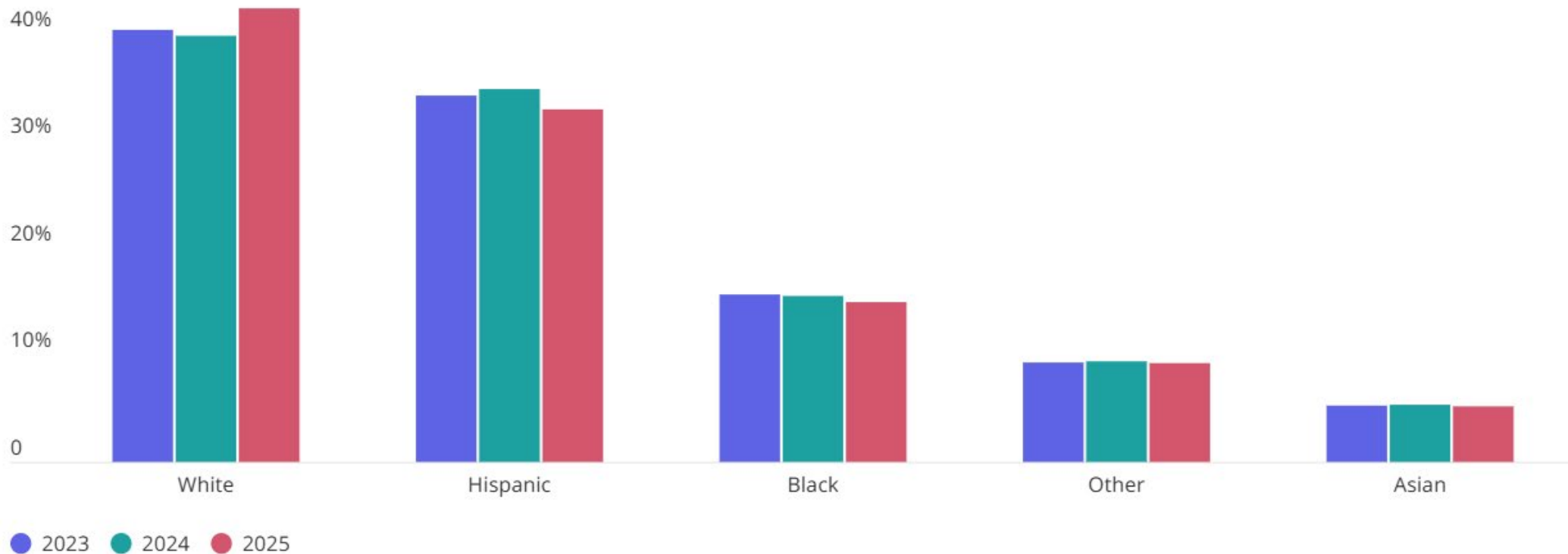
# Visitors to Water Parks are More Suburban Than Previous Years

📍 Distribution of Visits by Consumer Segment to Top U.S. Outdoor Water Parks



# Visitation by Ethnicity Signals Broader Changes

## 📍 Distribution of Visits by Ethnicity to Top U.S. Outdoor Water Parks



# Outdoor Water Parks – Broadly Appealing

- Outdoor water parks are seeing renewed growth, led by suburban and diverse audiences. Weather plays a major impact in outdoor waterpark performance.
- Weekends dominate visitation allowing properties to yield manage pricing and family promotions.



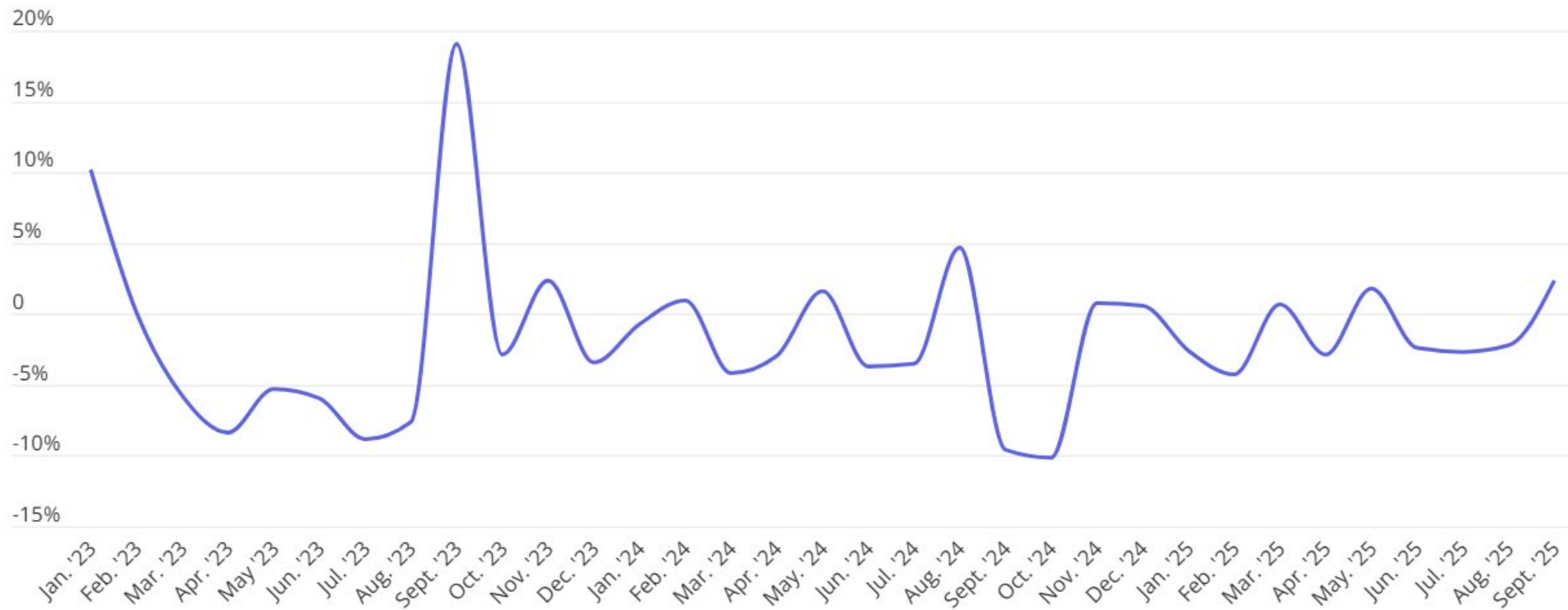
# Theme Parks

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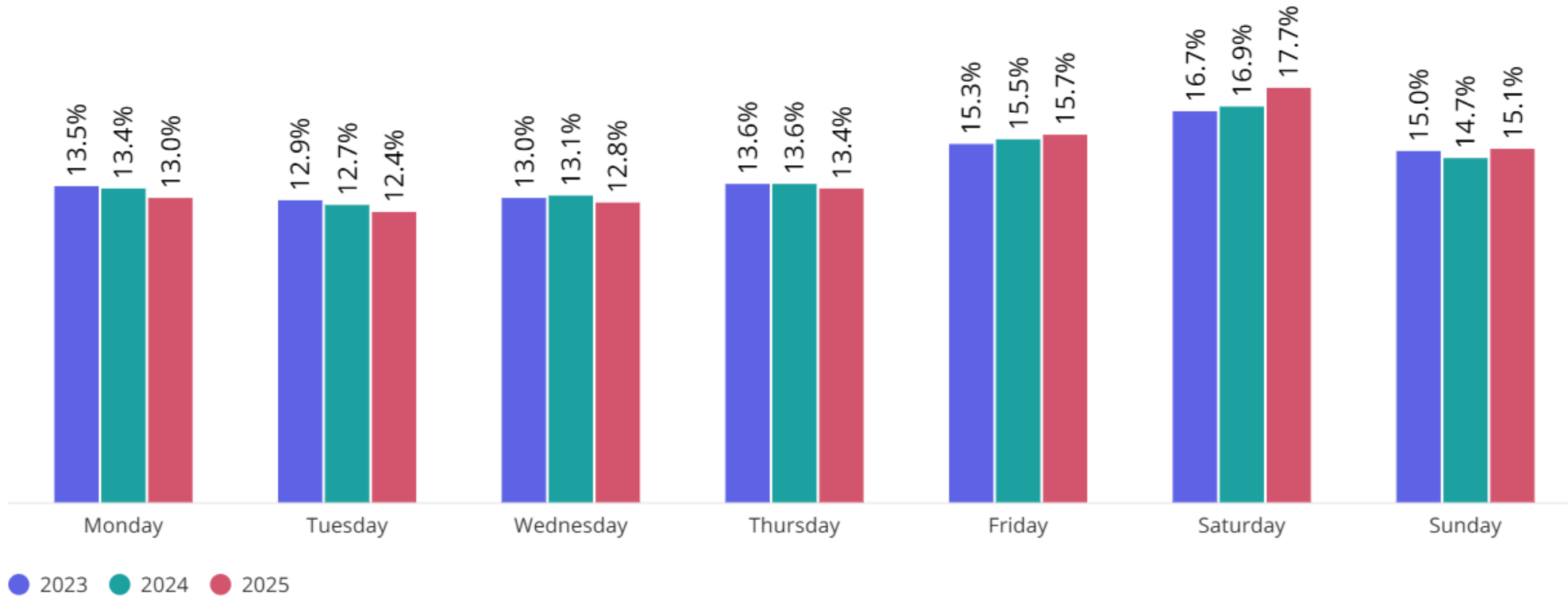
# Theme Park Visitation Remains Steady, But Limited Growth

📍 Monthly Change in Visits to Top U.S. Amusement & Theme Parks, <60 minutes in Duration



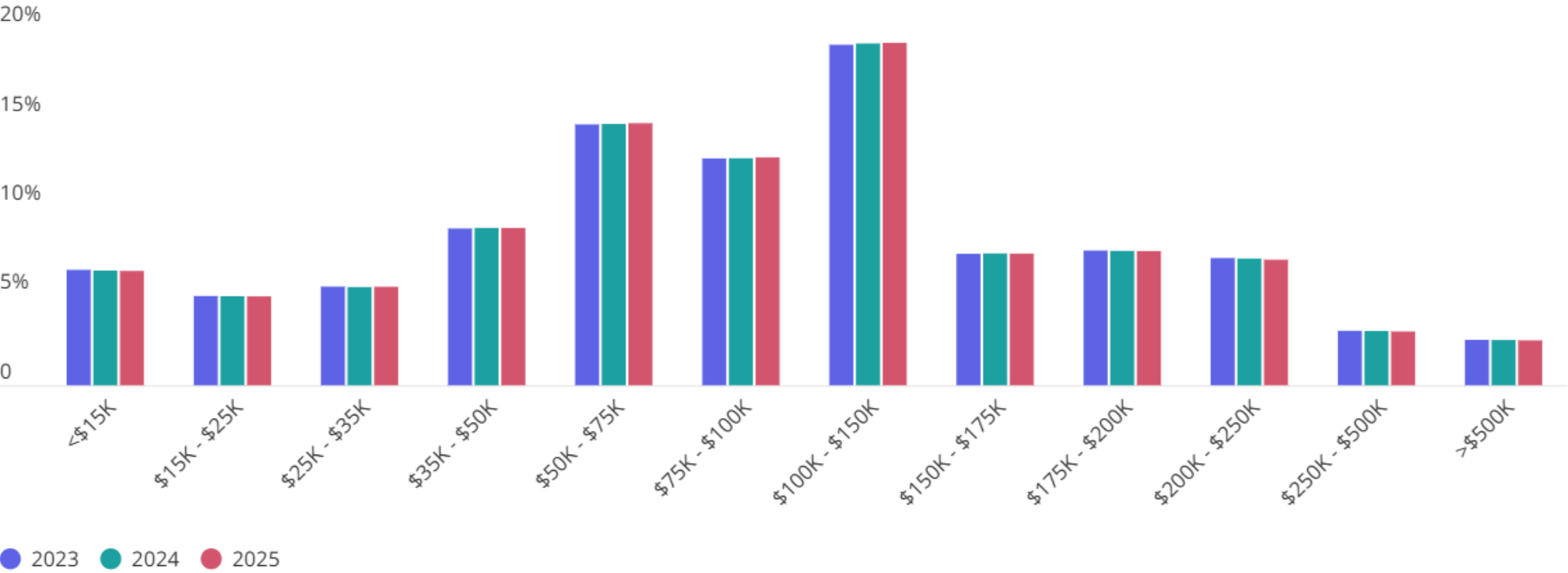
# Weekday Visits to Theme Parks are Less

📍 Distribution of Visits by Day of the Week to Top U.S. Amusement & Theme Parks



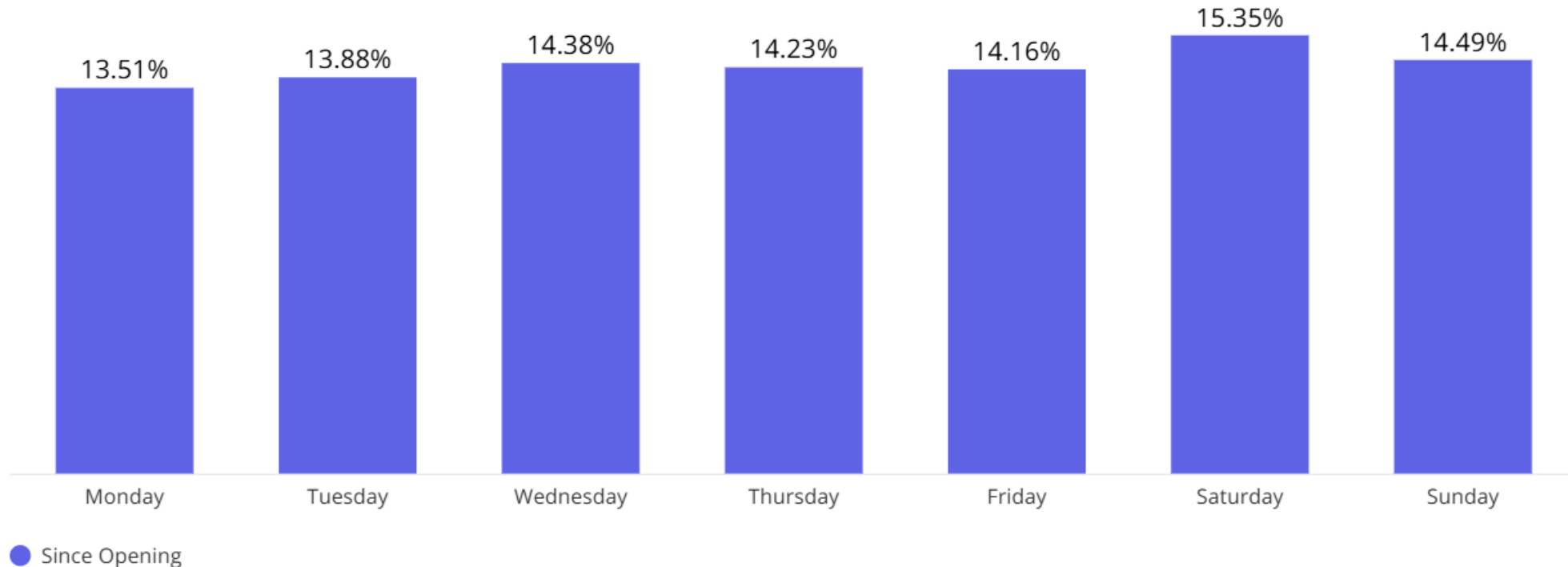
# Middle Class Visitors Represent Highest Visitation

📍 Distribution of Visits by Household Income to Top U.S. Amusement & Theme Parks



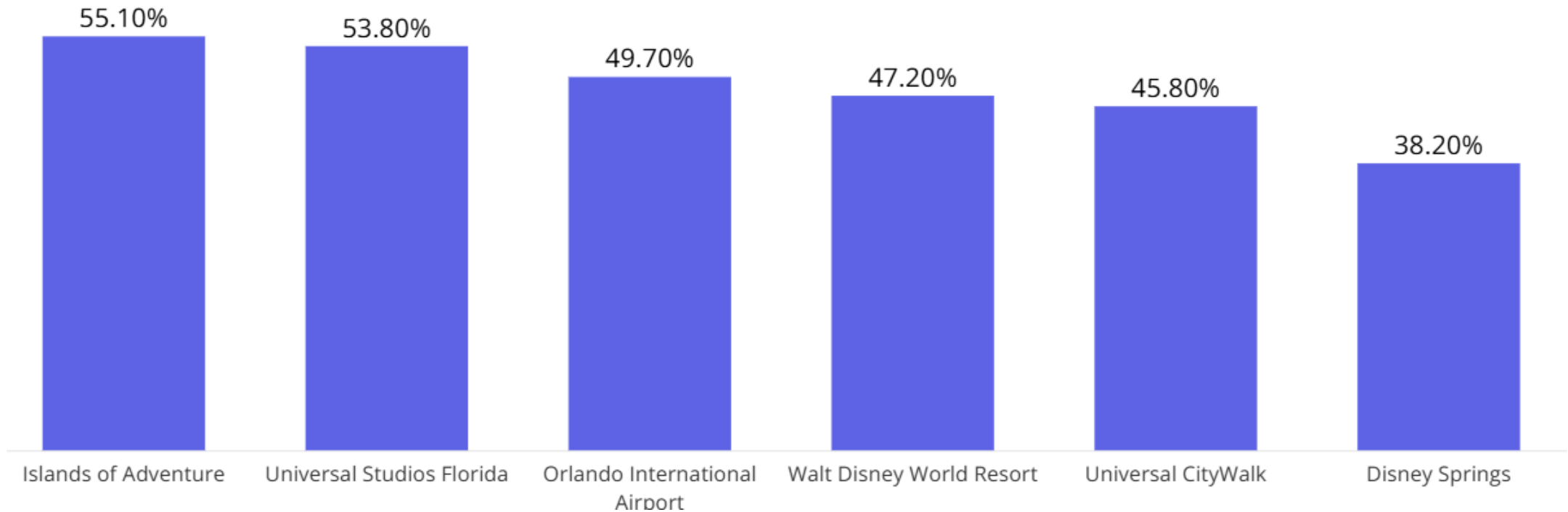
# Epic Universe Draws Even Distribution of Visits in Opening Months

📍 Distribution of Visits to Epic Universe by Day of the Week



# Epic Universe Shows High Cross-Visitation with Other Orlando Parks

📍 Percentage of Visits to Other Venues Among Visitors to Epic Universe Since Opening



# Cross-Visitation & Regional Synergies

- Epic Universe data shows strong first year performance and high crossover visitation with other Orlando parks.
- Multi-park behavior points to collaborative marketing and bundled ticketing opportunities.
- Understanding visitor travel radius supports regional destination strategies.
- Epic Universe cost a reported \$7 to 8 billion to develop.

# Theme Parks – Stable Yet Evolving

- Attendance remains steady but slow-growing, with a strong middle-class presence.
- Weekday softness continues, highlighting opportunities for targeted offers and events.
- Local and regional day-trip markets drive attendance—proximity remains key.
- Six Flags' recent partner in Travis Kelce could bolster chain.



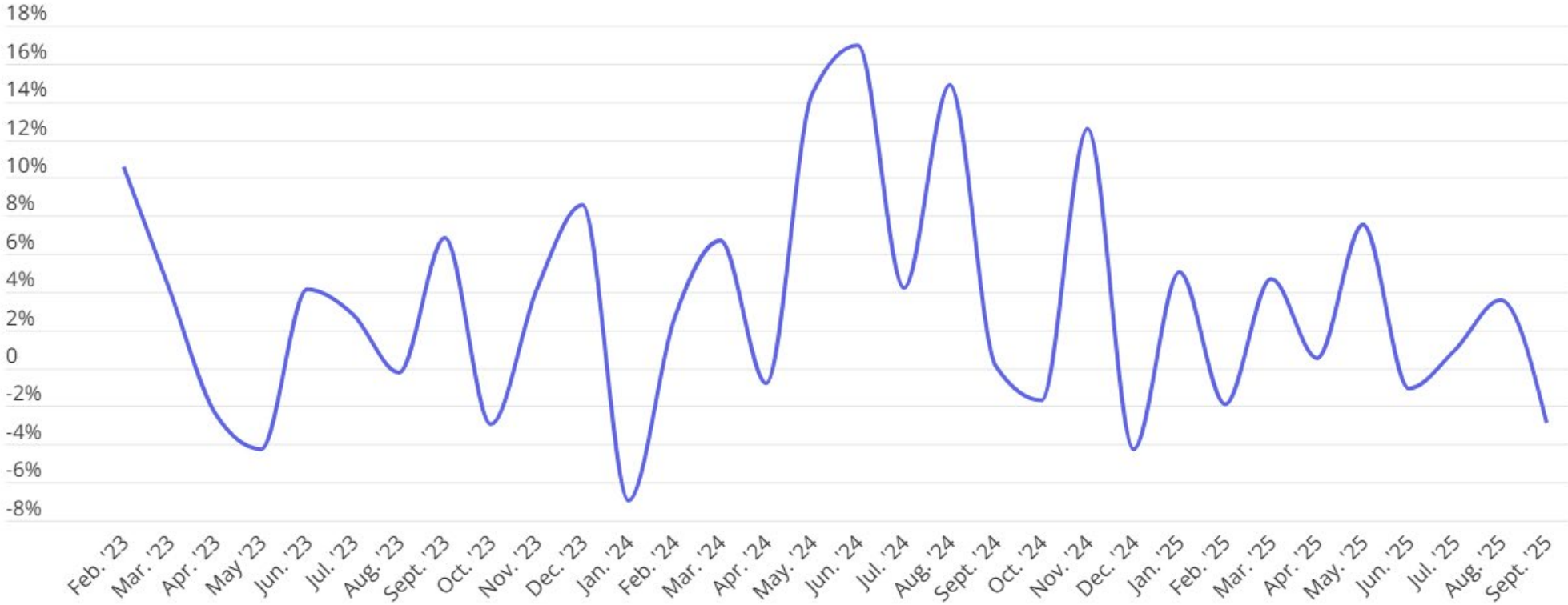
# Family Entertainment Centers

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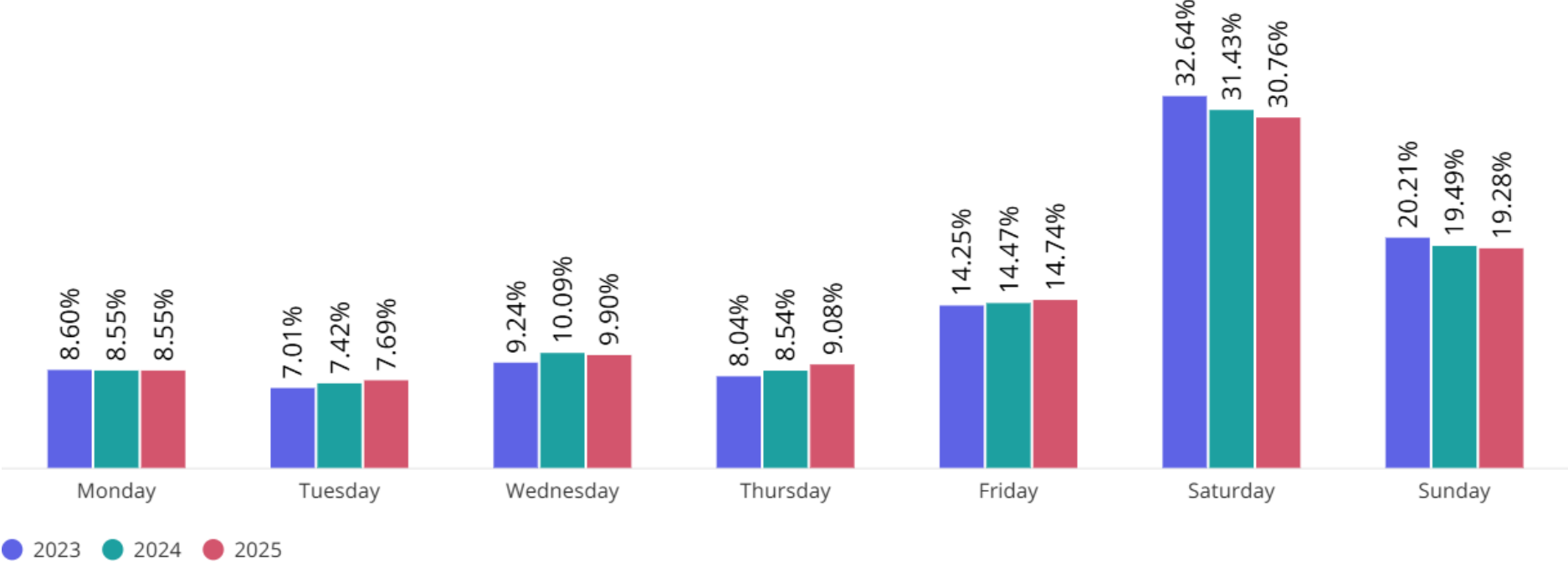
# FEC Chains Continue to See Volatility in Traffic

## 📍 Change in Monthly Visits to Top FEC Chains



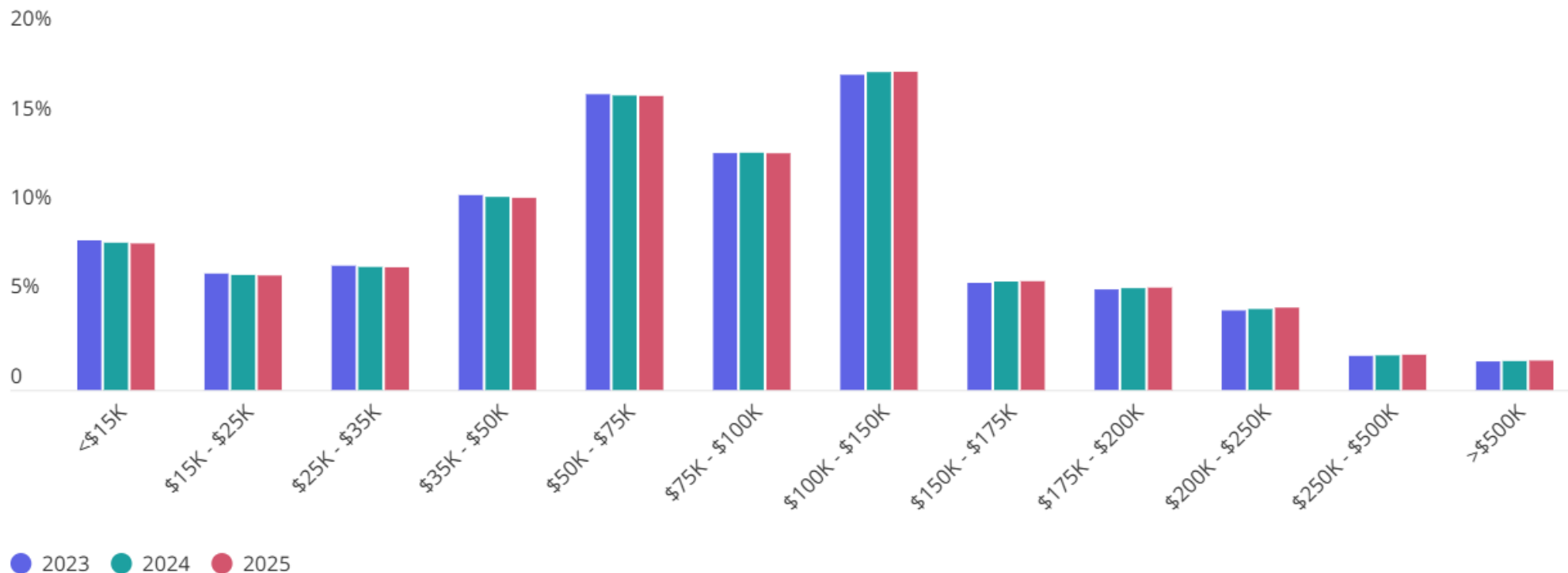
# FEC Chains See Higher Share of Weekend Visits

📍 Distribution of Visits by Day of the Week to Top FEC Chains



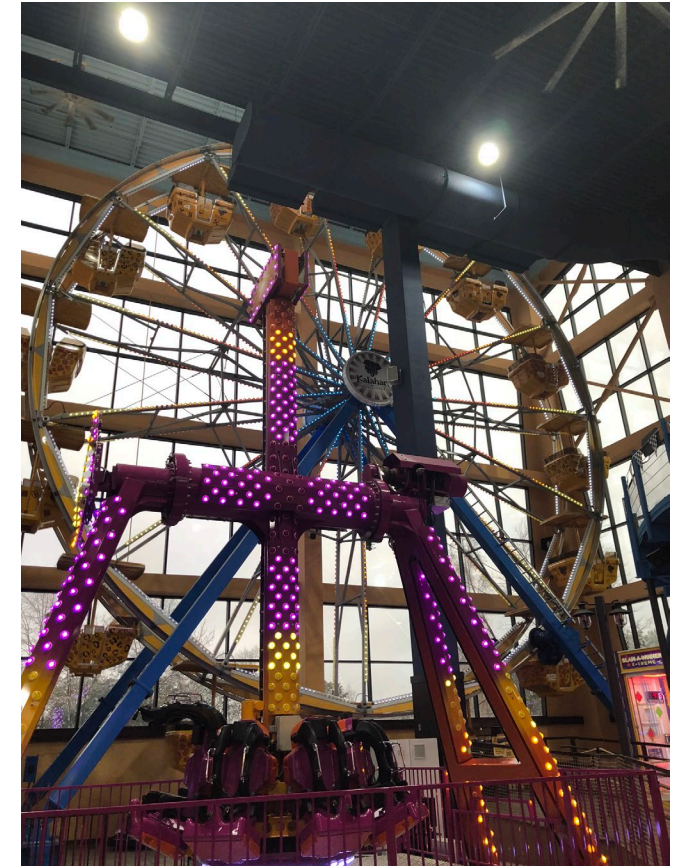
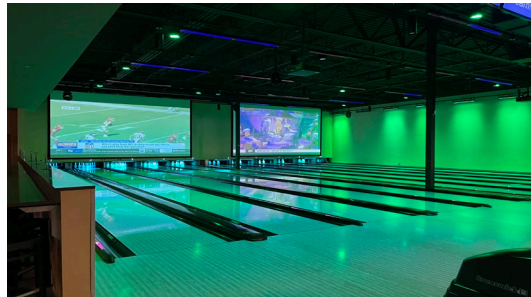
# Wealthier Families Growing Share of Visits to FEC Chains

## 📍 Distribution of Visits by Household Income to Top FEC Chains



# Family Entertainment Centers (FEC)

- FEC visitation is shaped by local market conditions and shorter visit durations.
- Saturdays are the busiest days.
- Operators can respond through hyperlocal marketing, loyalty programs, and premium experiences on slower days.



# Utilizing the Data

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# Why Visitor Analytics Matter

- Placer.ai provides real-time insights into who visits, when, and from where.
- Understanding visitation patterns supports better marketing, operational, and development decisions.
- Analytics transform raw data into actionable intelligence for growth and guest satisfaction.



# Feasibility Studies – Areas for Analysis

1. Area, Demographic, and Neighborhood Analysis
2. Site Review
3. Proposed Development Recommendations and Costs
4. Market Analysis
5. Proposed Development Usage and Pricing Analysis
6. Financial Analysis
7. Feasibility Analysis
8. Comparison of Value Created to Projected Costs

Areas of the feasibility study that are informed by attendance and usage data

# Feasibility Studies – Proposed Projects

## How We Use Placer.ai:

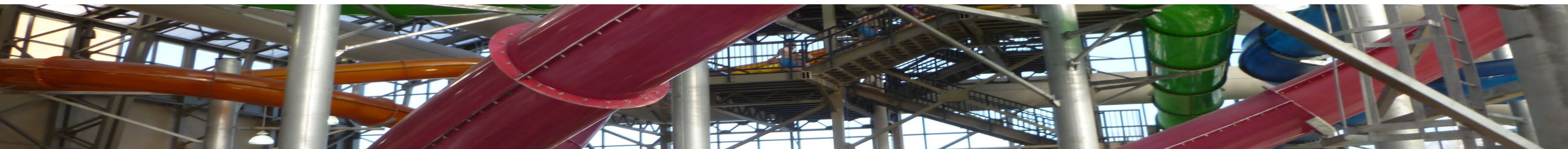
- **Regional Visitation Insights:** Analyze overall visitation to the market by focusing on one or more key attractions in the area.
- **Visitor Origin Analysis:** Identify where visitors are coming from to understand drive-time markets and regional draw.
- **Competitive Benchmarking:** Evaluate visitation and usage levels of comparable attractions in conjunction with market interviews to establish a baseline for attendance, occupancy, and performance expectations.
- **Attendance Modeling:** Use insights from Placer.ai data to inform realistic attendance projections and market capture rates for proposed projects.



# Market and Financial Analysis Studies – Existing Properties

## How We Use Placer.ai:

- **Historical Visitation Analysis:** Assess past visitation trends to understand seasonality, growth, and shifts in visitor patterns.
- **Operational Insights:** Identify opportunities for operational adjustments—such as hours, pricing, or programming—based on visitor trends and behavior.
- **Competitive Benchmarking:** Compare performance against similar regional attractions to gauge relative market positioning and identify areas for improvement.
- **Investment Support:** Use data-driven visitation trends to support recommendations for renovation, expansion, or repositioning.



# U.S. Attractions Landscape

- Millions of guests visit amusement parks, water parks, and FECs annually across the country.
- Each sector shows distinct seasonality, demographics, and spending behaviors.
- From 2020–2025, data reflects steady recovery and evolving consumer dynamics.
- Opportunities for new attractions development exist

# Using Data to Inform Operations

# Consultant & Developer Applications

- Usage data strengthens feasibility studies, financial modeling, and site selection.
- Provides additional benchmarking tools for existing and proposed projects nationwide
- Placer results are not always accurate and need to be confirmed with management at individual properties or other data sources.
- Informs strategic recommendations grounded in real visitation performance.
- Visitation data provides trends



# Insights for Future Operators

## Turning Data Into Operational Advantage

- Analytics reveal when, where, and who visits, enabling smarter planning.
- Operators can refine marketing, staffing, and guest engagement for measurable improvements.
- Data-driven agility enhances both efficiency and profitability.

## Optimize Resources with Real-Time Patterns

- Monitor peak and off-peak hours to guide staffing and maintenance.
- Align food, retail, and ride operations with traffic flow to boost per-capita spend.
- Plan maintenance and downtime for low-volume periods to minimize disruption.

# Strategic Planning

## Data-Informed Development and Investment

- Use visitation trends to plan new attractions and amenities.
- Compare markets to identify expansion opportunities.
- Incorporate origin and income data into pricing and capacity planning.
- Track outcomes to measure ROI and capital performance.



# Questions



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