

The Economics of FEC Attractions: What Actually Produces Value?

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Abstract

Industry discussions frequently seek a universal ranking of the most effective family entertainment attractions. Such rankings are difficult to defend because attraction performance depends on concept, customer, capacity, footprint, pricing, labor, maintenance, capital cost, repeat use, birthday appeal, and the role of the attraction within the broader experience. Comparable national attraction-level financial data are also rarely public. This article therefore proposes a multidimensional Attraction Productivity Framework rather than naming a universal winner. The framework evaluates demand and capacity, space and capital economics, operating burden, and strategic family value. It distinguishes direct economic productivity from system contribution and introduces repeat-use and novelty-decay measures that are particularly important for membership-oriented parks. The paper argues that familiar attractions such as trampolines, slides, climbing, and digital games should not be rejected merely because they are conventional; instead, they can be redesigned with progressive challenge, interactive layers, social missions, and creation. The research priority is a standardized industry dataset capable of comparing attraction types across multiple dimensions.

Why 'Best Attraction' Is the Wrong Question

Family entertainment operators, investors, and landlords understandably want to know which attractions produce the strongest return. The question appears simple but is structurally ambiguous. Does 'best' mean highest revenue per square foot, highest attendance, highest contribution margin, fastest payback, strongest marketing draw, best birthday conversion, highest member repeat use, widest age range, or strongest parent approval?

A large ropes course can have powerful visual and marketing value while producing modest direct ticket revenue relative to its volume. An arcade game can generate high revenue per square foot but add little developmental differentiation. A toddler soft-play area can have limited premium pricing but support family acquisition and birthday demand. A creator station may earn less direct revenue while improving memberships, school programs, or brand position. The economic role of the attraction therefore depends on the system around it.

The lack of standardized public data is also important. Supplier case studies and individual operator disclosures can be useful, but they do not provide a controlled national ranking across attraction categories. Claims that one attraction universally produces the highest revenue per square foot or return on capital should therefore be treated cautiously unless the underlying sample and accounting definitions are available.

Dimension 1: Demand and Capacity

The first dimension is demand. Operators should measure participation rate, utilization by daypart, willingness to pay, repeat use, and demand by age or customer segment. However, demand must be interpreted with capacity. A highly desired attraction with severe throughput constraints can create long waits and reduce the experience of both users and non-users.

Capacity metrics can include guests per hour, turn time, dispatch interval, queue abandonment, and occupancy. The relevant unit is not simply how many people want the attraction, but how many satisfying uses the attraction can deliver within the physical and labor constraints of the park.

Theme-park research has long shown that queuing and time allocation matter to perceived value and loyalty. In a study of theme park experience, Godovykh, Milman, and Tasci (2019) examined relationships among pleasure, time allocation, perceived value, queuing quality, satisfaction, and loyalty. Although large theme parks differ from indoor FECs, the broader principle transfers: attraction demand cannot be separated from the time cost imposed on the guest.

Dimension 2: Space and Capital Economics

The second dimension evaluates what the attraction produces relative to scarce resources. Revenue per square foot is useful in leased environments, but contribution margin per square foot is often more informative because attractions have different labor, consumables, and maintenance burdens. Revenue per invested dollar or contribution per invested dollar captures a different constraint: capital.

An attraction can be space-efficient but capital-intensive. Another can occupy substantial area but require modest initial investment. The appropriate metric depends on which resource constrains the project. In a high-rent urban location, square footage may dominate. In a low-rent but capital-constrained expansion, investment productivity may matter more.

Attribution is a persistent problem. A highly visible attraction can generate traffic for the whole venue even if guests do not pay for it separately. Operators should therefore distinguish direct revenue from attributable system effects where possible.

Dimension 3: Operating Burden

The third dimension captures the cost and fragility of operating the attraction. Staffing, training, supervision intensity, maintenance, inspection, downtime, replacement parts, cleaning, utilities, consumables, licensing, insurance, and safety requirements all affect contribution.

Two attractions with identical revenue can have very different economics if one requires continuous skilled staffing and frequent downtime while the other runs with low variable cost. The same attraction can also perform differently across operators because preventive maintenance and staff productivity vary.

Operational sustainability is one reason the Future Experience Standard includes the requirement that an experience can be safely staffed, maintained, refreshed, and economically supported

(Future Experience Park, 2026). An attraction that produces strong theoretical revenue but creates chronic maintenance or labor pressure may weaken the park as a whole.

Dimension 4: Strategic Family Value

The fourth dimension is often missing from attraction scorecards. Some assets create value indirectly through marketing visibility, age breadth, parent approval, birthdays, memberships, developmental differentiation, social connection, or the overall customer journey. These effects are harder to measure but commercially important.

A signature slide may produce a memorable peak. A climbing progression system may create long-term mastery. A parent-child challenge may increase whole-family value. A creator station may generate take-home products and school relationships. A multipurpose area may be lightly utilized on ordinary open-play days but essential for birthdays, competitions, presentations, and community events.

Customer experience is multidimensional, and the attraction portfolio should therefore be evaluated as a portfolio rather than as a collection of independent profit centers (Godovykh & Tasci, 2020a). An attraction that looks weak in isolation can be strategically valuable if it fills a missing experience role.

Repeat Use and the Novelty Curve

Membership-oriented FECs require a fifth perspective: how the attraction performs across repeated visits. The first-visit participation rate can be misleading if use drops sharply after the child understands the experience. Operators should calculate a repeat-use index based on the probability of reusing the attraction on visits two, three, five, and ten.

The FEC Gap Taxonomy identifies novelty decay and replayability deficits as structural issues in fixed equipment environments (Godovykh, 2026). The attraction-economics framework should therefore include the cost of refreshing the experience. A low-cost physical asset with rapidly changeable content may outperform a more spectacular but static attraction over the lifetime of a membership relationship.

This is also where development and economics intersect. Levels, new routes, personal records, rotating missions, team challenges, or child-created rules can increase repeat use without replacing the asset. The operator should measure whether these interventions change the decay curve.

Familiar Attractions Can Be Redesigned

Innovation should not become an excuse to reject what families demonstrably enjoy. Trampolines, climbing, slides, arcades, ball games, and screens are understandable, immediately accessible experiences. The strategic question is how to deepen them.

A trampoline court can incorporate targets and team strategy. A climbing wall can support progressive routes. A slide can be part of a mission. A digital game can require whole-body

movement or allow the child to create content. An arcade mechanic can reward collaborative or physical performance. These redesigns may preserve familiar demand while addressing developmental, social, and novelty gaps.

This principle is consistent with *How to Build the Best Activity Park*, which argues that activity mix, zoning, economics, safety, operations, marketing, and loyalty should be designed together (Godovykh et al., 2026).

A Practical Attraction Scorecard

No single score should replace managerial judgment, but operators can compare attractions using a consistent dashboard.

- Demand: participation, utilization, willingness to pay, age breadth, birthday appeal.
- Capacity: guests per hour, turn time, queue length, abandonment, peak-day resilience.
- Space economics: revenue and contribution margin per square foot.
- Capital economics: revenue, contribution, and cash payback relative to installed investment.
- Operating burden: labor hours, maintenance, downtime, utilities, consumables, training, and safety complexity.
- Repeatability: use across successive visits, content refresh cost, and progression potential.
- Strategic value: marketing draw, parent approval, developmental contribution, social connection, membership value, and cross-selling effects.

Conclusion

There is unlikely to be one universally best family entertainment attraction. Performance depends on concept, customer, property, pricing, operating capability, and the rest of the portfolio. The industry's stronger research opportunity is to standardize measurement rather than repeat unsupported rankings. A useful attraction dataset should compare demand, capacity, space productivity, capital return, labor, maintenance, downtime, repeat use, parent value, and developmental contribution. Only then can operators determine what produces the greatest value for their particular family entertainment park.

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