

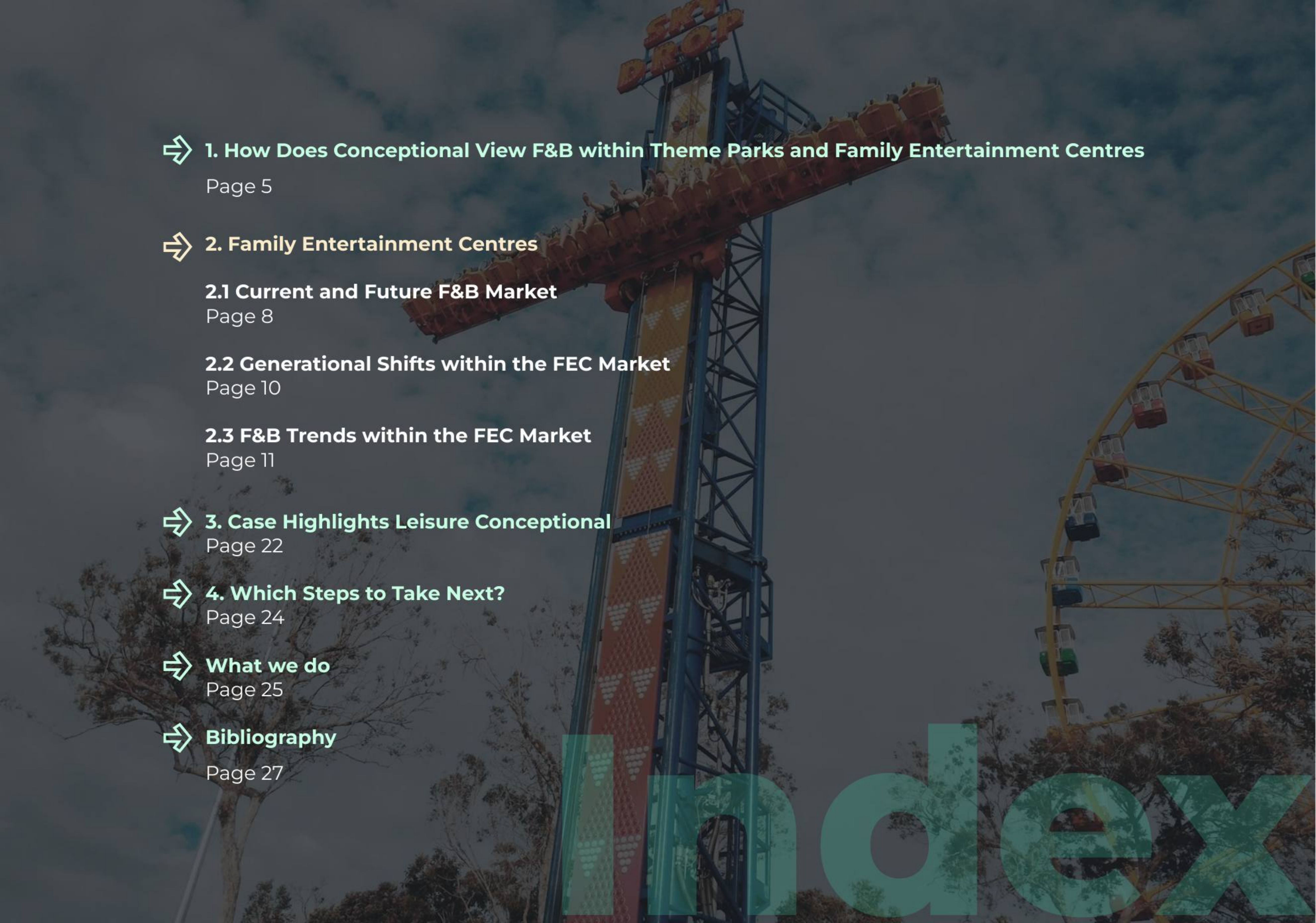
CONCEPTIONAL®

2025

# CONCEPTIONAL FOOD & BEVERAGE TREND REPORT

PART 2: FAMILY ENTERTAINMENT CENTRES  
EUROPE & MENA





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Dear readers,

We as Conceptional are proud to present to you, our 8th Trend Report, this time focused on F&B within the dynamic world of leisure. Based on our experience and perspective, the leisure industry is vast and diverse. To deliver the most value and expertise, we specifically zoom in on the **trends shaping F&B in the Family Entertainment Centre (FECs) market, with a clear focus on Europe and the Middle East**. This trend report is divided into two parts. This part, part 2, provides an in-depth exploration of F&B trends within Family Entertainment Centre market. Part 1 focussed on F&B trends in the Theme Park market.

Leisure destinations are evolving rapidly. **From immersive Theme Park experiences to the rise of social competitive FECs, one thing is clear: food & beverage is no longer just a side offering, it's a vital part of the total guest journey and the overall revenue.** These shifts are driven by new generations of visitors, changing expectations, and an increased demand for seamless, experience driven environments.

This report outlines how Conceptional views the role of F&B in today's leisure landscape. It dives into market developments, explores generational shifts in guest behaviour, and highlights key F&B trends across FECs. In addition, we highlight best practices drawn from both our own recent projects and leading industry examples that exemplify the key F&B trends shaping the future of F&B in leisure.

By sharing these insights and take-outs, we aim to inspire and support you in strengthening your F&B strategy, whether you're developing a new destination or optimising an existing concept.

Let's shape the future of F&B together.

Enjoy the read!

Reoewein Niesten, Claartje Verschoor & Manou Kooman



**Reoewein Niesten**

Founder & CEO

T: +31 70 20 55 688

E: [niesten@conceptional.nl](mailto:niesten@conceptional.nl)

# Introduction

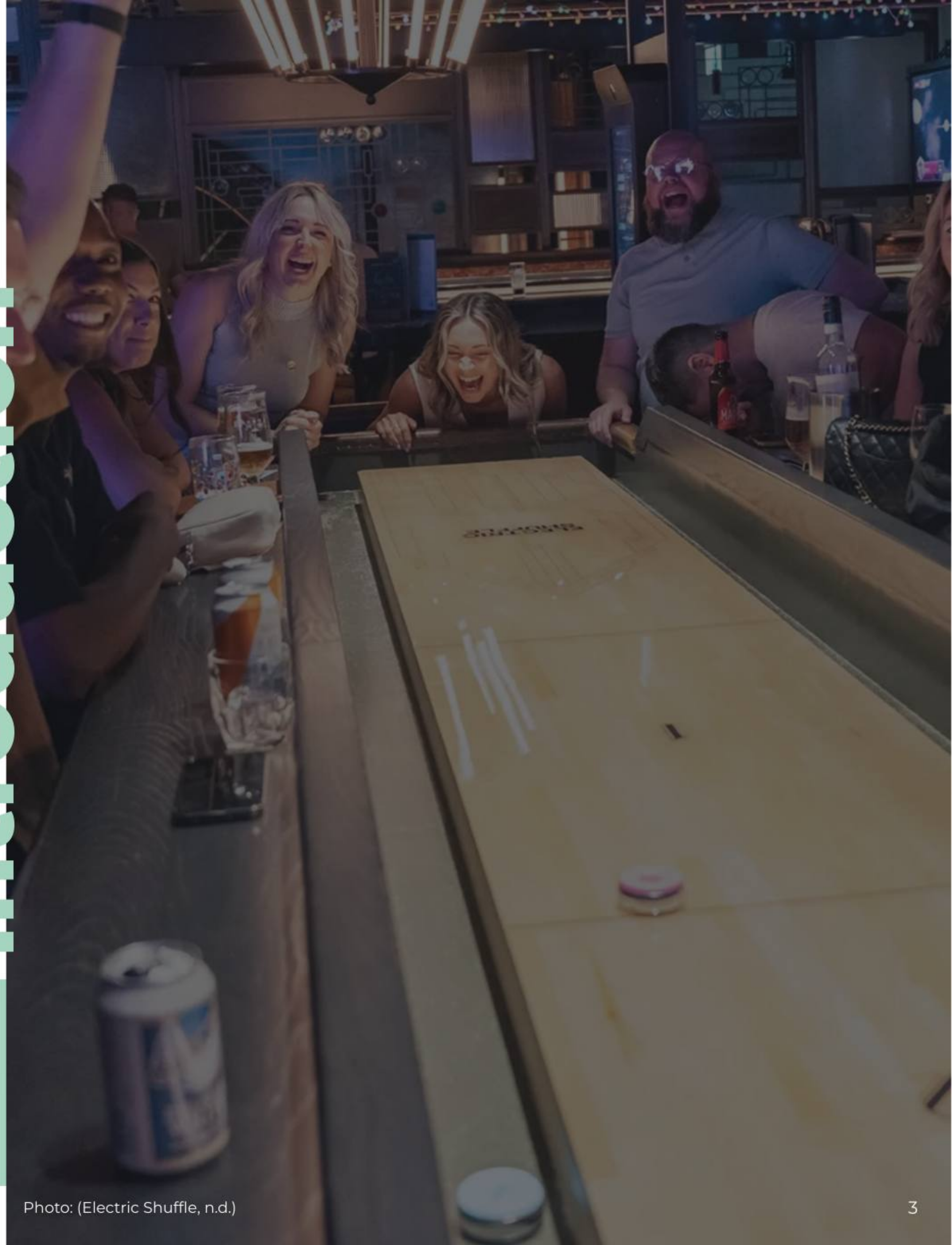


Photo: (Electric Shuffle, n.d.)



# Who are we?

CONCEPTIONAL®



**Reoewein Niesten**  
Founder & CEO

**Fred van Aken**  
Managing Partner

**Dirk van den Wijngaard**  
Creative Director

**Edwin Spruijt**  
Managing Director Iberia

**Andres Gonzalez**  
Managing Director MENA



**Jeanne Dinkgreve**  
Senior Concept Developer

**Stefano Zese**  
Senior Concept Developer

**Lennard Poillot**  
Senior Concept Developer

**Ronald Groen**  
Senior Kitchen Specialist

**Anastasiia Hrin**  
Business Developer

**Hidde Verschuren**  
Medior Concept Developer

**Marina Gonzalez**  
Medior Concept Developer



**Carole Lionet**  
Medior Concept Developer

**Judit Szöllösi**  
Associate Concept Developer

**Claartje Verschoor**  
Associate Concept Developer

**Luca Scholp**  
Foodservice AI Specialist

**Jane de Kort**  
Associate Concept Developer

**Manou Kooman**  
Trainee

**Rares Pricopi**  
Trainee



# 1. How Does Conceptual View F&B within Theme Parks and Family Entertainment Centres?

In both Theme Parks and Family Entertainment Centres (FECs), F&B is no longer just a necessary service, it plays a **central role** in how guests remember, feel, and engage with a company. It adds **value**, builds **trust**, and has the potential to greatly **improve brand perception and revenue**.

However, many FECs make it feel more functional than experience driven by failing to include F&B into the overall guest experience. By more thoughtfully integrating F&B, FECs can **transform** these services from merely functional **to truly memorable**.

When it comes to Theme Parks, expectations are even higher. Visitors often arrive **expecting more than just entertainment**, they seek **immersive F&B experiences** that align with the themed environments around them. From unique snacks to themed restaurants, F&B has an outstanding opportunity to make a lasting impression if done with creativity and intent. It **drives dwell time**, **supports storytelling**, and establishes a **personal connection** with visitors.

Nonetheless, both Theme Parks as FECs often underuse and **underestimate its potential**. F&B can sometimes be seen as a logistical afterthought with little connection to the brand story. This perception arises when companies do not fully recognise its potential. "There often is no concept behind the menu, and it's not connected to the story".

We as Conceptual see this differently. By improving F&B diversification and optimizing capacity use, you give guests more reasons to spend on F&B more often. We believe that when F&B is treated with the same care as attractions, decor, and guest flow, it becomes an **experience on its own**. This philosophy is at the heart of every project we undertake: "We create sustainable F&B concepts and places that understand and surprise you and your guests".



# Key Takeouts from the Team

"F&B can contribute up to 20–30% of **total revenue** in Theme Parks and FECs, it's not just a service, it's a business driver."

"F&B must align seamlessly with the overall (themed) experience. It should be **immersive** and of **high quality**, if it doesn't match the story, it breaks the immersion."

"Price-to-quality ratio is crucial, an **intelligent pricing strategy** is key to both guest satisfaction and profitability. Therefore, **uniqueness** and **differentiation**, driven by **strong IPs** and **creative product** and **service design**, are essential."

"**Visitor flow within Theme Parks and FECs must be clearly mapped**, ensuring each F&B concept is positioned to reach the right target audience at the right moment."

"F&B is an **integrated part of the overall development**, carefully aligned with the expected guest experience, price point, volume flows, and available capacity."

"F&B should be designed to **support the entire guest journey**, offering relevant experiences at **every moment of the day**. With variety across day-parts to create more reasons to buy."





## 2. Family Entertainment Centres

A Family Entertainment Centre (FEC) is an indoor or mixed-use leisure venue that offers a variety of games, attractions, and activities.

F&B is becoming more and more acknowledged as an essential tool in FECs. Guests now expect to enjoy food and drinks during activities, enhancing both convenience and spend. This seamless integration makes F&B more important than ever.

This section explores the current and future market outlook, the influence of generational shifts, and emerging trends, supported by inspiring best practices and Conceptional's project cases.



## 2.1 Current and Future F&B Market Insights within the FEC Market

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“When F&B is not executed well or when it is unreasonably priced, it can have a negative impact on the total experience.” - Conceptional

Family Entertainment Centres (FEC) are indoor or mixed-use leisure venues designed for all age groups, offering a **mix of attractions** like arcade games, indoor playgrounds, mini golf, laser tag, VR zones, and sports such as bowling, climbing or go-karting. In regions like MENA and Europe, FECs range from **compact**, mall-based concepts to **large-scale, immersive destinations**.

Family Entertainment Centres (FECs) are rapidly evolving. While FECs were once defined by stand-alone indoor attractions like bowling or arcades, the definition is now expanding to include **experiential social competitive** venues like Mooie Boules and Flight Club. These concepts represent a new era of ‘**eaterertainment**’: experiences where **F&B** are no longer separated, but an **integrated** and **elevated** part of it (8).

Guests increasingly want to be **entertained while they eat**, seeking **shared, social experiences** that combine activities, dining, and atmosphere in a single setting. The rise of **social competitive concepts**, like darts, shuffle or jeu de boules paired with food and drinks, reflects this trend. As a result, FECs are diversifying their income strategies. While entry fees remain important, **F&B** has emerged as a **primary revenue generator** (6, 7).

Industry experts highlight the growing demand for hybrid venues that feel both **premium** and **playful**. The modern FEC is no longer a simple “play zone with snacks,” but a carefully designed leisure destination that **blends leisure, hospitality, and design** in a cohesive way.

F&B services now generate **around 30% of global FEC revenue**, underscoring their importance in **driving guest satisfaction** and **extending dwell time** (6, 7).

Operators like Electric Shuffle and Brass Monkey are leading the way and have similarly emphasised F&B as a strategic lever, investing in branded food zones and high quality menus to boost per-capita spend and create memorable experiences (9).



# FEC Market Outlook



**USD 52.35 Billion**

Market size in 2024.  
Expected to reach USD 59.17 billion by 2025 (6).



**USD 110.97 Billion**

Expected global market size in 2030 for FECs (6).



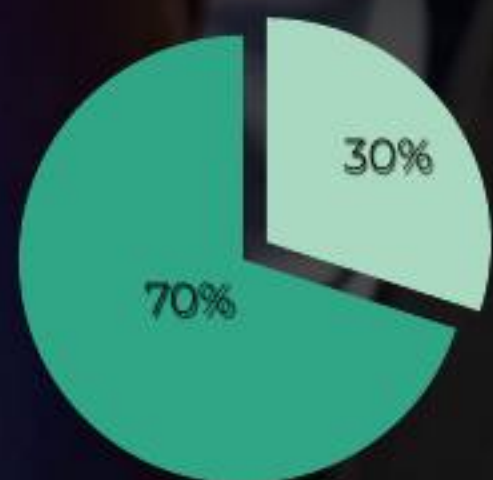
## Single-activity destinations

the market is changing from single activity destinations like a bowling alley or a dart bar to multi-activity destinations.



## Multi-activity destinations

FECs are turning into multi-activity, experience-driven destinations. This model is often referred to as Eatertainment or Competitive Socialising, think of venues that offer both bowling, karaoke and darts (8).



● F&B  
● Other revenue streams

## F&B generates 30% of overall FEC revenue

F&B services generates around 30% of overall FEC revenue globally (6, 7)



## 10-13% CAGR

The Family Entertainment Centre market size is expected to be growing at a compound annual growth rate (CAGR) of 10 till 13% by 2030 (6, 7).



## 2.2 Generational Shifts within the FEC Market

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FECs are rapidly evolving in response to shifting demographics and lifestyle trends. With fewer households having young children, FECs are **moving beyond family-only audiences to attract Millennials and Gen Z**, who value shareable, experience-driven moments over material goods (10, 11).

The rise of social media and demand for **immersive, group-based activities** have positioned FECs as ideal destinations for **social fun**. To stay relevant, operators are rethinking their F&B, design, and guest journey to meet the expectations of these new experience-focused visitors (12).

### 1. Technological Integration

Above mentioned generations have grown up with digital tools and expect seamless tech integration during their visit. From mobile ordering and game-based scoring apps to digital upsell prompts and seamless booking systems. Technology in FECs isn't just a convenient tool, it's central to making the guest experience smooth, intuitive, and engaging.

### 2. Shared Dining

Shared dining has become a popular food trend among Millennials and Gen Z. In FECs, shared dining enhances the group experience, whether during gameplay or while relaxing between or after activities. Menus designed around snacks, small plates, and global flavours encourage longer stays and create a more dynamic atmosphere.

### 3. Premium (non) Alcoholic Beverages

Drinks are no longer just an add-on, they're a core part of the experience. High-quality cocktails and mocktails, craft beers, and premium soft drinks are increasingly expected. These offerings allow FECs to appeal to both adults and younger guests in inclusive and upscale ways.

### 4. Activity + Dining Integration

Today's visitors expect to enjoy both entertainment and food without compromise. The best FECs offer full menus of quality dishes served at the lane, booth, or karaoke box, eliminating the need to leave the venue for a proper meal. Dining and play are becoming one.



## 2.3 F&B Trends within the FEC Market

### 1. Tech-enabled journey

Technology is becoming a key factor in the F&B journey within FECs. Guests expect fast, frictionless service, whether at a bowling alley or karaoke room. Mobile ordering, tablet control, and table payment increase flexibility and reduce waiting times, allowing guests to stay immersed. Technology also enables upselling through timed pop-ups and helps promote specials or products nearing expiry, maximising sales and minimising waste.

 **Duke of Tokyo - The Netherlands**

### 2. Non-alcoholic beverages

The demand for creative non-alcoholic beverages is rising in FECs. As younger generations embrace healthier lifestyles, offering premium mocktails, sodas, and artisanal drinks creates a more inclusive and elevated experience. Kids' mocktails and premium soft drinks are also appearing more often on menus, helping younger guests feel special and part of the occasion. Expanding non-alcoholic options allows FECs to meet evolving guest expectations and boost overall satisfaction.

 **Sixes Social Cricket - UK**

 **Tenpin - UK**

### 3. Food and fun packages

Combining food with activities is becoming a popular strategy in FECs. Guests are more likely to enjoy their visit when food is seamlessly integrated into the experience. Packages that combine gameplay with snacks, drinks, or meals increase convenience and value, and help raise minimum spend per ticket, especially for families and returning members. However, as packages do not automatically increase average spend, it remains important to push for add-ons to further boost per capita revenue.

 **Jeu de boules bar - The Netherlands**

 **Magic Planet - Middle East**

### 4. Shared dining and global flavours

Sharing dishes inspired by international cuisines is becoming a major trend within FECs. Guests increasingly prefer small, shareable portions that can be enjoyed casually during activities. Snack platters, global street food, and flexible menus make it easy to combine eating with socialising. While classics like burgers will remain popular, shared dining formats will play a much larger role in shaping the future F&B experience in FECs.

 **NondeJeu - The Netherlands**

 **Puttshack - United Kingdom**



# F&B Trends within the FEC Market

## 5. *Day-part expansion*

Many FECs have traditionally focused on family activities in the afternoons, but now also host events and social gatherings for a broader target group. This expanded day-part coverage not only maximises use of the venue but also taps into new audiences, increasing revenue beyond the traditional daytime market and the sometimes limited use of F&B in the venue. Concepts like bottomless brunches, live music nights, viewing parties for major sports events, themed quizzes, or gaming tournaments are gaining popularity, transforming FECs into vibrant multi day-part destinations.

 **Ski Dubai - United Arab Emirates**

 **Sixes Social Cricket - United Kingdom**

## 6. *Elevated F&B experiences*

Guests now expect to enjoy high-quality dining at the same venue as where they plan their activities. As a result, FECs are elevating their culinary offerings to create seamless experiences where high-quality dining and entertainment go hand-in-hand, increasing dwell time and overall spend.

 **O' Learys - Worldwide 100+ locations**

## 7. *F&B themed in line with activity*

FECs are moving beyond purely functional dining spaces by designing F&B concepts that are fully integrated into the venue's theme and storytelling. From the interior design to the style of the menu, food and beverage outlets now extend the entertainment experience, making dining a natural and immersive part of the guest journey.

 **Central - United Arab Emirates**

 **Neverland - Hungary**

 **Sparkx - The Netherlands**





# Topgolf

## Worldwide - 100+ locations

Topgolf is a global entertainment venue that blends tech-enabled golf games with casual dining and drinks. It offers an interactive, accessible golf experience for all skill levels, supported by bars, live music, and event spaces, creating a fun, all-in-one leisure destination.

1. Tech-enabled journey
3. Food and fun packages
5. Day-part expansion

➡ Topgolf seamlessly combines food and entertainment with packages like brunch-and-play, tapping into the demand for food & fun experiences. Events such as ladies' nights and trivia evenings expand appeal across day-parts and guests can order via in-booth tablets, which prompt reorders every 20 minutes.





# Electric Shuffle

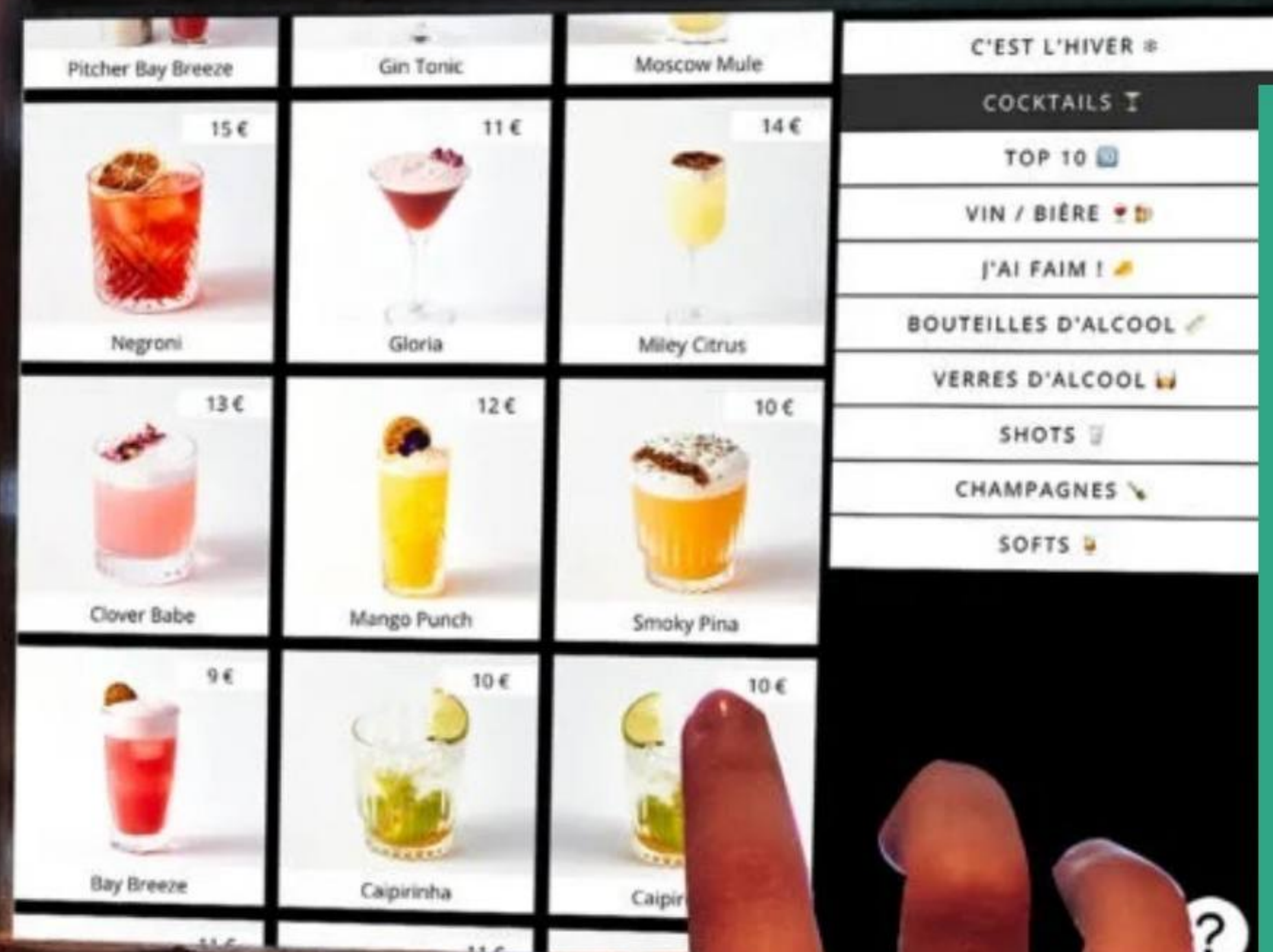
UK | USA - 9 locations

Electric Shuffle reinvents traditional shuffleboard with group gameplay and touchscreen tech. Set in stylish, industrial-inspired interiors, it blends competitive socialising with premium food, craft cocktails, and mocktails, designed for sharing. Electric Shuffle caters to everything from casual outings to corporate events and bottomless brunches.

- 1. Tech- enabled journey
- 2. Non- alcoholic beverages
- 4. Shared dining and global flavours
- 5. Day- part expansion

➡ Electric Shuffle is a strong example of a modern FEC, combining tech-driven gameplay with pre-ordering a wide range of cocktails and premium soft drinks, and shared dining. With food-and-fun packages, day-part events like bottomless brunch, and theming aligned to the shuffleboard experience, F&B becomes a seamless part of the social, guest-focused journey.





# BAM Karaoke Box

France | Spain | UK - 10 locations

BAM Karaoke Box is a premium karaoke concept that operates 10 locations across Europe, including its flagship UK venue in London, currently the largest karaoke venue in Europe. Known for blending private karaoke rooms with high-end hospitality, BAM offers a full dining and entertainment experience under one roof.

1. Tech- enabled journey
2. Non- alcoholic beverages
4. Shared dining and global flavours
5. Day- part expansion

⇒ BAM fits key FEC trends by combining tech-enabled in-room ordering, high end premium mocktails, and a globally inspired menu designed for sharing. Guests enjoy events like quiz nights, Pride nights or screenings and dine either in the restaurant or mid-song in their karaoke box.





# Flight Club

UK | IRL | AUS | USA - 20+ locations

Flight Club is a social darts venue that combines high-tech multiplayer darts with a vibrant bar and shared dining experience. Inspired by Victorian fairgrounds, it blends competitive socialising with premium food, drinks, and playful, nostalgic theming.

- 2. Non- alcoholic beverages
- 6. Elevated F&B experiences
- 4. Shared dining and global flavours
- 7. F&B themed in line with activity

⇒ Flight Club offers a great selection of drinks, including a wide range of non-alcoholic beers, and organises events like group tournaments with game masters. The extensive menu is built around shared dining, designed to be enjoyed while playing or at the bar. The interior reflects the energy of darts and offers a seamless themed F&B experience.





# Mooie Boules

## The Netherlands - 6 locations

Mooie Boules is a food hall and indoor jeu-de-boules venue originating in the Netherlands. It combines casual pétanque (French-style boules), karaoke, shuffle and boardgames with high-quality street food and a lively bar atmosphere. Guests can play, eat, and drink in one dynamic setting.

- 4. Shared dining and global flavours
- 5. Day- part expansion
- 6. Elevated F&B experiences

➡ Mooie Boules offers high quality street food-style dishes made for sharing from well-known local chefs. Through events like tournaments and football nights, Mooie Boules actively supports day-part expansion. The setup encourages guests to enjoy F&B while playing or between and after games, making the overall experience seamless and social.



# Brass Monkey

## UAE | Egypt - 3 locations

Brass Monkey is a vibrant social entertainment venue located in Dubai and Cairo, combining retro arcade games, bowling alleys, VR simulators, and live music with a lively bar and dining atmosphere. It offers a playful, adults-only take on the family entertainment centre.

- 4. Shared dining and global flavours
- 5. Day- part expansion
- 7. F&B themed in line with activity

➔ With curated food and fun packages, guests can enjoy activities alongside set menus and high quality shared dining. Events like Ladies Night and Taco Tuesday support day-part expansion. Its fully themed interior aligns perfectly with the energetic and playful spirit of the activities, making F&B an integral part of the overall experience.





# OliOli

## United Arab Emirates

OliOli is an interactive play museum in Dubai, designed to spark curiosity, creativity, and exploration in children through hands-on, interactive exhibits. Spread across themed galleries like Water, Air, Toshi's Net, and Future Park, it blends play with learning in a carefully curated environment. OliOli is built on the principles of open-ended exploration and meaningful engagement, making it a standout destination for families seeking enriching, screen-free experiences.

**3.** Food and fun packages

**7.** F&B themed in line with activity

➡ OliOli aligns strongly with the “food and fun” package trend by offering tailored birthday and school group packages that combine playful learning with curated F&B options. Their on-site café, La Petite Treehouse Café, complements the museum's aesthetic with a wholesome, child-friendly menu and a calm, nature-inspired atmosphere.





# Clays Bar

## United Kingdom - 4 locations

Clays Bar is a venue that combines tech-enabled clay target shooting with a lively bar and dining experience. Using digital screens and replica shotguns, guests can engage in interactive clay shooting games. Clays offers a unique group activity blending play, F&B, and nightlife in one seamless experience.

- 2. Non- alcoholic beverages
- 3. Food and fun packages
- 5. Day-part expansion

⇒ Clays Bar fits key industry trends by offering a wide range of low- and no-alcohol drinks, like mocktails and even 0% spirits. Its packages cater to groups from 2 to 430 people, combining interactive clay shooting with tailored F&B. Clays also enables full day-part expansion, with private rooms, AV-equipped spaces for meetings and conferences, and full venue takeovers, making it a versatile choice for both business and social events.





# Interested in part 1?

Check our [website!](#)

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25

## CONCEPTIONAL FOOD & BEVERAGE TREND REPORT

PART 1: THEME PARKS  
EUROPE & MENA



# 3. Case Highlights Leisure Conceptional

IAAPA BRASS RING AWARD



## Polles Keuken Efteling - The Netherlands

Brass Ring Award winning concept Polles Keuken is an immersive pancake restaurant rooted next to the park's fairytale forest. As a simplusive concept, it focuses entirely on one core product: pancakes. Conceptional supported Efteling with this F&B plan and concept.



## Majid al Futtaim MENA region

Majid Al Futtaim operates in various sectors in the MENA region, including in the development and operation of leisure & entertainment and lifestyle & retail. Conceptional, Together with the MAF team, Conceptional delivered a validated plan to support future revenue growth.



## Walibi Walibi Holland - The Netherlands

Walibi Holland is a Theme Park in Biddinghuizen, the Netherlands. The park aims to reach a visitor number of more than 1 million within a few years. Conceptional was asked by Walibi Holland to draw up an F&B Masterplan 2024-2028.



## CJ Live City Seoul - South Korea

CJ Group, a South Korean holding company, asked Conceptional to develop an F&B Master Plan and vision for a new to be build entertainment complex at CJ Live City in Seoul, aiming to attract top operators and ensure optimal operations.

## Projects in leisure

Efteling

CJ LIVECITY

WALIBI

universe

WILDLANDS

Plopsaland DE PANNE

THE LAND OF LEGENDS

madurodam

TOVERLAND

PLASWICK PARK

INKA PARK

MAJID AL FUTTAIM

Holiday PARK GERMANY

CITY CONCORDE LIFESTYLE CENTER

landal Holiday breaks in nature

BURGERS' ZOO

PATHE

Roompot

HOLLAND CASINO



# Case Highlights Leisure Conceptional



## **SparkX** Hasselt - Belgium

Sparkx Hasselt is an indoor "sportainment" park, offering over 50 different sports experiences, from AR-enhanced football to curling. Conceptional was asked to develop the conceptplans and the functional plan, laying out the overall park vision, zoning of sports and F&B areas, and detailed guest flow strategies.



## **Universe Science Park** - Denmark

Universe Science Park in Denmark is an Adventure Park where Fun is Science. Conceptional took on the Food & Beverage strategy and coached on operations. The first result was an increase in average spending of more than 25% in the first year.



## **Plopsaland** De Panne - Belgium

Plopsaland De Panne is a theme park inspired by beloved Studio 100 characters. Conceptional was brought in to create the comprehensive masterplan. This work helped ensure a seamless integration of storytelling, operations, and visitor flow across the park.



## **Efteling Grand Hotel** - The Netherlands

Grand Hotel, opening August 2025, will be the first luxury hotel within the park itself. Conceptional was asked to craft the masterplan for the hotel and also developed the conceptplans for both Restaurant-Bar Mystique, Brasserie 7 and Café Biscuit. Finally, Conceptional delivered the functional layouts and provided guidance with the design.

## Projects in leisure

Efteling

CJ LIVECITY

W  
WALIBI

universe

WILDLANDS  
ADVENTURE ZOO INHARN

Plopsaland  
DE PANNE

THE LAND OF  
LEGENDS  
THEME PARK • HOTEL • SHOPPING AVENUE

madurodam

TOVERLAND

PLASWICK  
PARK

INKA  
PARK

ماجد الفطيم  
MAJID AL FUTTAIM

Holiday PARK  
GERMANY

CITY CONCORDE  
LIFESTYLE CENTER

landal  
Holiday breaks in nature

BURGERS' ZOO

PATHE

Roompot

HOLLAND  
CASINO



# 4. Which steps to take in F&B?

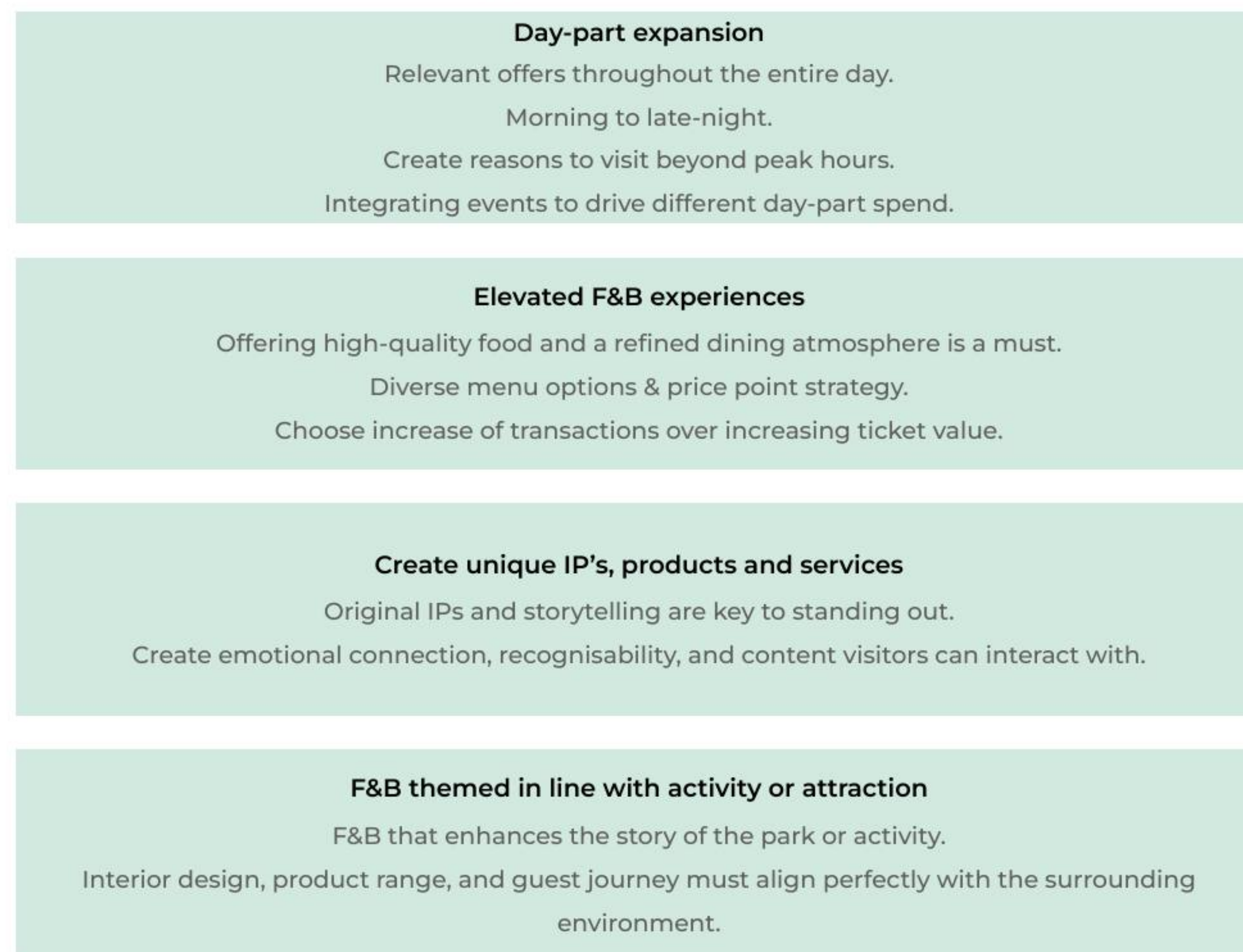
*F&B could now accounts for up to 30% of total revenue in many Theme Parks and FECs. Conceptional is your strategic partner to unlock it's potential, through market insight, concept creation, and operational excellence.*

**CONCEPTIONAL®**

## Which steps to take in F&B?



## Which points to consider



*Curious how we can enhance your F&B services in the leisure sector?  
[Get in touch to learn how we can elevate your offering!](#)*



# WHAT WE DO?

CONCEPTIONAL<sup>®</sup>

*CONCEPT DEVELOPMENT*  
**WE CREATE RESTAURANT  
CONCEPTS WITH A HEART.**

*F&B MASTERPLANNING*  
**WE CRAFT STRATEGIC  
VISIONS FOR SPACES  
WITH MULTIPLE F&B  
VENUES.**

*STRATEGY &  
TRANSFORMATION*  
**WE SUPPORT  
SUSTAINABLE GROWTH  
AND SUCCESSFUL  
TRANSFORMATIONS.**

*SUSTAINABLE FOOD ROUTE*  
**WE IMPLEMENT  
SUSTAINABILITY INTO  
YOUR VISION,  
ORGANISATION AND F&B  
OFFERING**



**analyse.  
amaze.  
enjoy.**

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F&B CONCEPT DEVELOPMENT . F&B MASTERPLANNING  
F&B SUSTAINABLE FOOD ROUTE . F&B STRATEGY & TRANSFORMATION

Conceptional B.V.

A. Saturnusstraat 60, unit 60  
2516 AH The Hague  
The Netherlands

T. +31(0)70 20 55 688

E. [info@conceptional.nl](mailto:info@conceptional.nl)

W. [www.conceptional.nl](http://www.conceptional.nl)



Photo: (Brass Monkey, n.d.)

**Interested how  
we can elevate  
your F&B  
experience  
within leisure?  
Give us a call!**

Do you also believe F&B deserves the best attention and care in your foodservice or leisure company? Do you think that your guests deserve the best attention and care? Looking for a reliable, experienced business partner to develop F&B concepts and places that work? We at Conceptional are keen to discuss options in more detail with you. Let us understand and surprise you and your guests!

**Reoewein Niesten**

Founder & CEO

T. +31 70 20 55 688

E. [niesten@conceptional.nl](mailto:niesten@conceptional.nl)





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## Photos

Photo: (Electric Shuffle, n.d.)

Photo: (Europa Park, n.d.)

Photo: (Efteling, n.d.)

Photo: (YAS ISLAND, n.d.)

Photo: (Liseberg Park, n.d.)

Photo: (Walibi Holland, n.d.)

Photo: (Tivoli, n.d.)

Photo: (Boulderhal de campus, 2024)

Photo: (Brass Monkey, n.d.)

Photo: (BAM Karaoke Box, n.d.)

Photo: (wbworldabudhabi, n.d.)

Photo: (Wavehouse, n.d.)

Photo: (Seaworldabudhabi, n.d.)

Photo: (ClaysBar, 2020)

Photo: (OliOli, n.d.)

Photo: (Disneylandparis, n.d.)

Photo: (Vicars, 2024)

Photo: (Sixescricket, n.d.)