ZERO LATENCY VR

THE STATE OF LOCATION-BASED VR 2026

The largest global consumer study in location-based VR.

FOREWORD

IT IS TIME TO TAKE YOUR VENUE TO THE NEXT LEVEL

Back in 2015, Zero Latency opened the doors to the world's first free-roam VR venue, in Melbourne. Since then we have delivered thrilling, immersive experiences to millions of players worldwide, and watched consumer demand for VR evolve first-hand.

In 2023 we commissioned the first major consumer study into location-based VR. We have now run it again in 2026, with 2,386 people across North America, Europe and ANZ, and the message is clearer than ever: more people want VR than any other attraction, and it is the quality of the experience that sets venues apart.

Virtual reality entertainment has matured. It is no longer a novelty. It is a premium, social experience guests will happily pay for, and one they simply cannot get at home. For entertainment centers, that is a rare opportunity: proven demand for an attraction most venues still do not offer. This report lays out what guests told us they want, what they will pay for it, and how they choose where to go. We hope it helps you win.

Daniel Littlepage
Chief Growth Officer, Zero Latency VR

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KEY TAKEAWAYS

THE FIVE THINGS THAT MATTER MOST

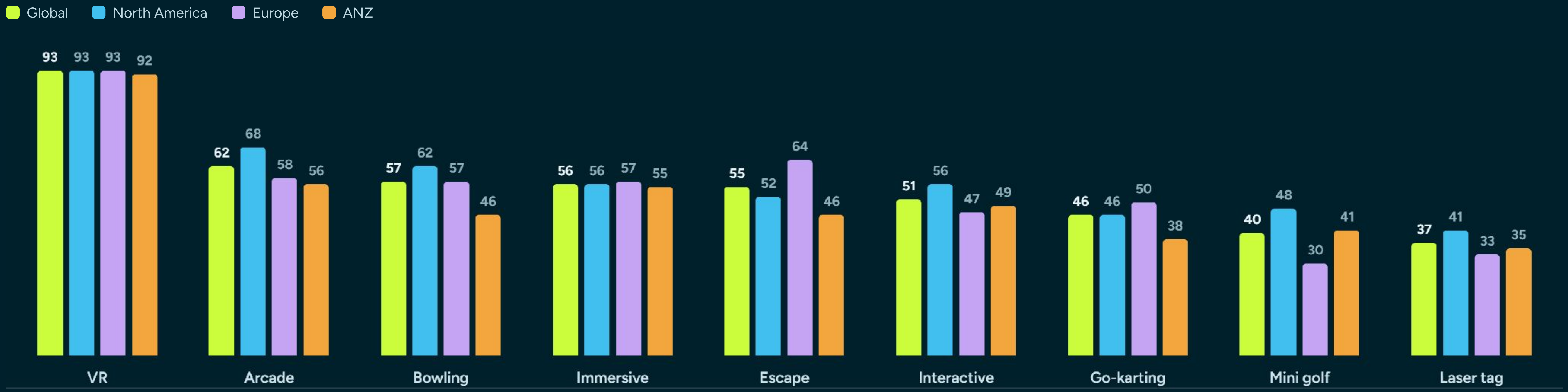
01	**Demand is settled**	VR is the most wanted attraction at **93%**, and interest holds across every region, household and income band.
02	**Quality is the new bar**	Guests expect premium, immersive, social experiences and will pay for them. Novelty alone no longer sells.
03	**It powers a bigger day out**	**78%** want VR alongside other attractions; it draws groups in and lifts spend across the floor.
04	**Friction, not desire, is the blocker**	The barriers guests name are operational: price perception, proximity and organising a group.
05	**Affluent, adult and family-led**	Higher earners and families are the keenest and least price-sensitive, in every market.

01 THE DEMAND VERDICT

THE ONE ATTRACTION MOST VENUES STILL DON'T OFFER

Asked which entertainment experiences they are interested in, consumers put virtual reality first, at 93%, ahead of arcades (62%), bowling (57%) and escape rooms (55%). It ranks number one in every region we surveyed, yet it is the one attraction most venues still do not have on the floor.

CONSUMER INTEREST BY ATTRACTION (% INTERESTED): GLOBAL VS REGION



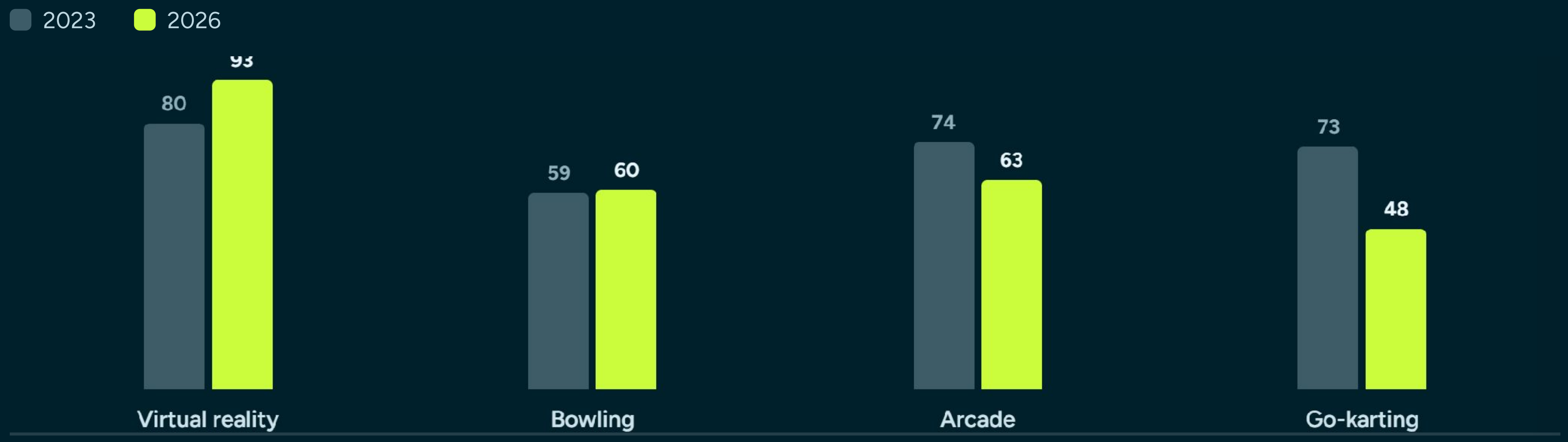
OPERATOR TAKEAWAY

VR out-draws every option guests can already get elsewhere. Add it and you capture the biggest pull in entertainment; leave it off and a competitor will.

01 THE DEMAND VERDICT

VR HAS STRENGTHENED SINCE 2023

VR is the one major attraction whose pull grew between our two studies, from 80% rating it very or extremely appealing in 2023 to 93% interested in 2026, while several familiar attractions softened.



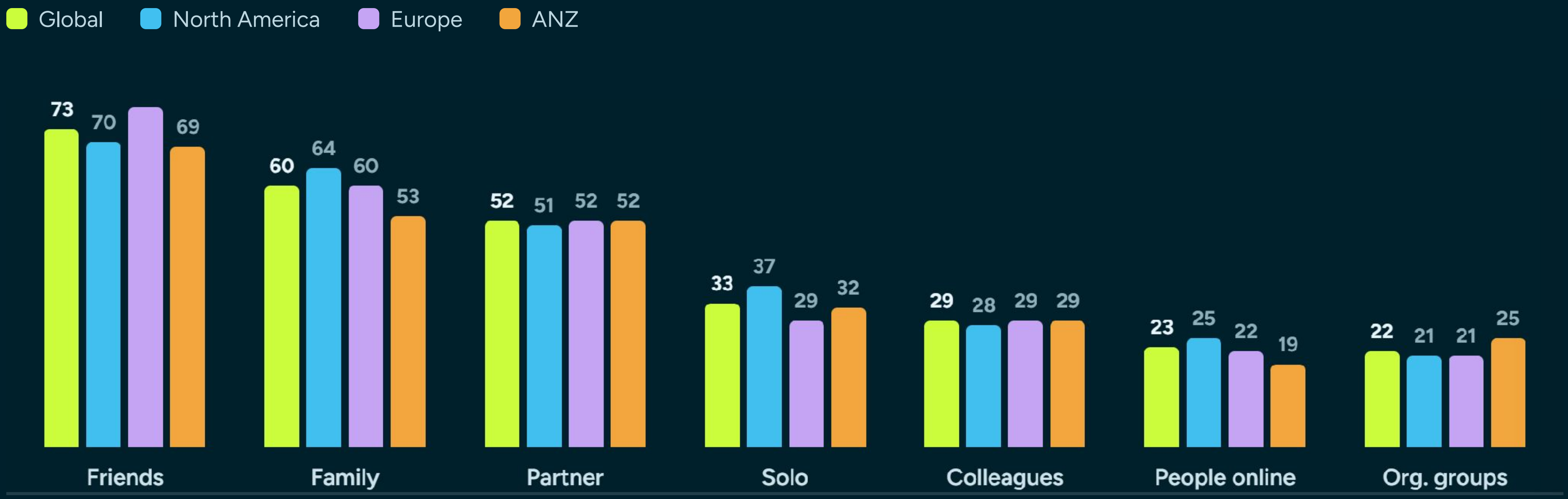
OPERATOR TAKEAWAY

Arcades are slipping as a quick, solo hit that leaves little memory, and go-karting has ceded ground to more inclusive, social competition. VR answers both: memorable, and built around people playing together.

VR ATTRACTS GROUPS

Consumers see a location-based VR experience as a group outing: 73% come with friends, 60% with family and 52% with a partner, while only a third ever play solo.

WHO CONSUMERS VISIT WITH (%): GLOBAL vs REGION



OPERATOR TAKEAWAY

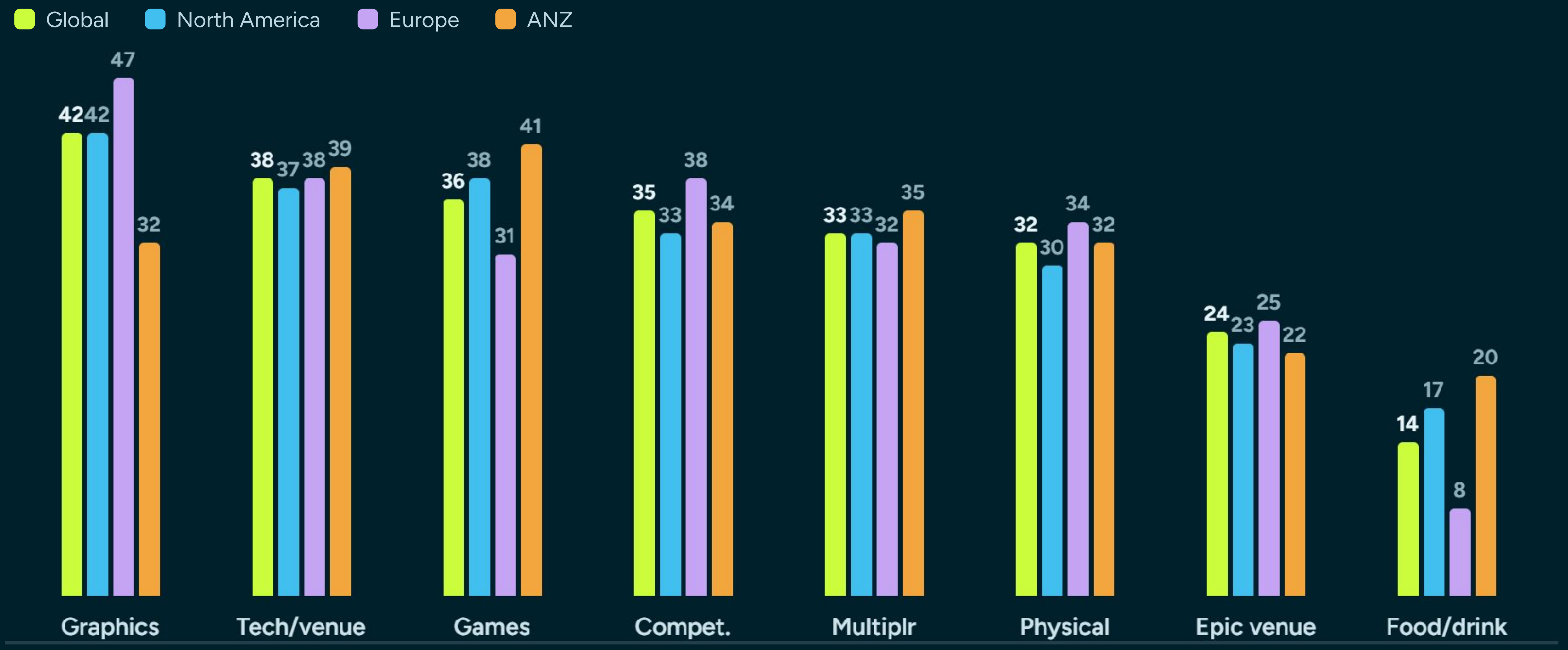
Favour attractions that are group-first, family-friendly and multi-mode, so one investment serves every audience.

03 THE PREMIUM DIFFERENCE

QUALITY IS THE EXPECTATION, NOT A BONUS

When guests picture VR, they expect quality first: impressive graphics (42%), the technology and venue (38%) and great games (36%). The quality of the in-game experience matters more to them than the surrounding environment, and it does not need to be paired with food and drink to draw a crowd.

WHAT CONSUMERS EXPECT FROM A VR EXPERIENCE (%): GLOBAL VS REGION



2023 VS 2026 RANK	'23	'26
Impressive graphics	#1	#1
Technology & venue	#2	#2
Great games	#6	#3
Physical movement	#3	#6

OPERATOR TAKEAWAY

Invest in the visuals, the kit and the content, or partner with a premium provider that keeps them current. And lean on IP-based games, which bring built-in familiarity alongside the quality guests expect.

WHAT MAKES PEOPLE BOOK HAS SHIFTED SINCE 2023

The top reasons people give for booking a VR experience are the thrill (36%) and a social experience with friends or family (35%), with doing something new close behind. Back in 2023, trying new technology was the number-one reason; today it sits fourth, a key signal the category has matured from novelty into a genuine experience.

WHAT WOULD MOTIVATE A BOOKING (% GLOBAL)

FACTOR	2023	2026
Trying new technology	#1	#4
Thrill / excitement	#3	#1
Social experience	#2	#2
Escaping everyday life	#4	#5

Rank in the list. Selection rules changed between waves, so ranks compare, not scores.

OPERATOR TAKEAWAY

Sell the emotion, not the technology.

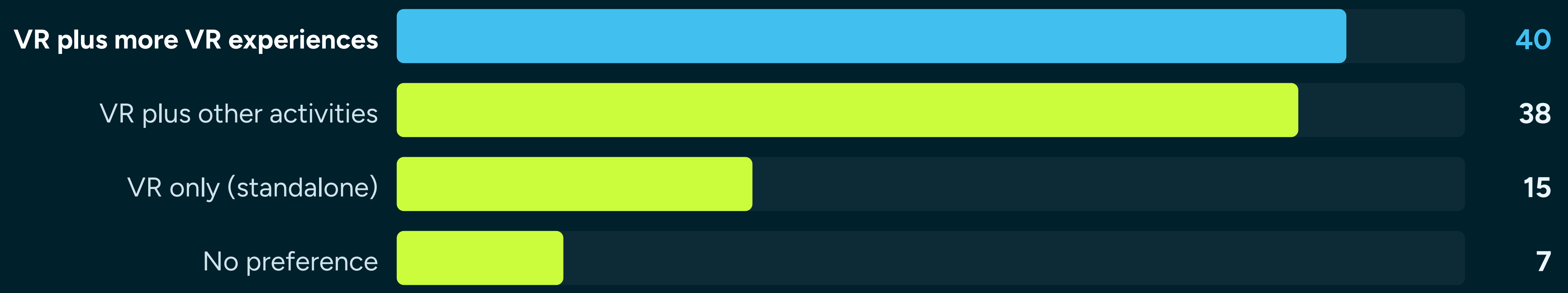
VR POWERS A BIGGER DAY OUT

With many VR experiences lasting under an hour, guests treat VR as part of a bigger day out rather than a one-off, and they want that day out under one roof. 78% prefer a venue that offers VR alongside other attractions, whether more VR experiences (40%) or activities like bowling and mini golf (38%), while just 15% want a standalone, single VR experience. Groups are after a day out together, made up of several shared experiences.

78%

want VR alongside other attractions, not on its own

PREFERRED TYPE OF VR VENUE (% GLOBAL)



North America leans most to a mixed venue; Europe is the most open to a VR-dedicated one.

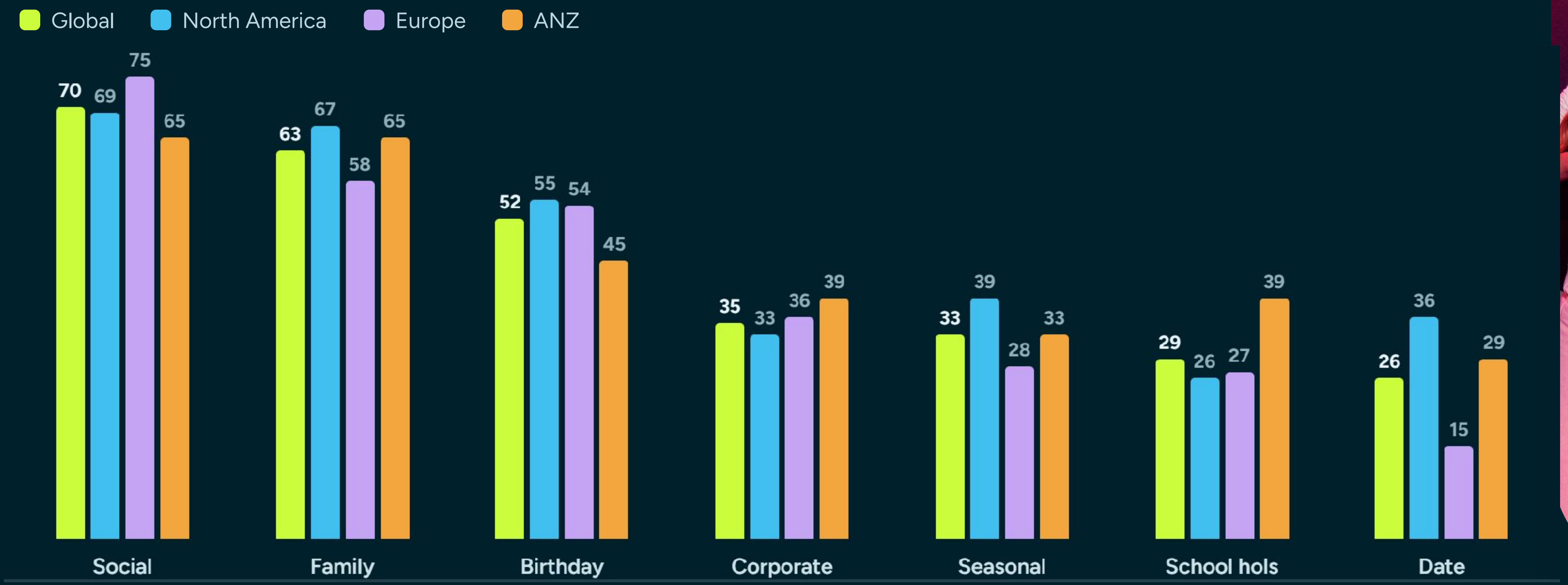
OPERATOR TAKEAWAY

Position VR as an anchor attraction of a multi-attraction visit, and bundle it with other attractions to lift both spend and satisfaction. Invest in a VR attraction that offers multiple experiences.

THE OCCASIONS WORTH MARKETING FOR

Guests would visit VR for the bookings that matter most to a venue: social outings (70%), family days (63%), birthdays and celebrations (52%) and corporate or team events (35%). Regional accents differ with date nights index high in North America and as a school holiday activity in ANZ.

OCCASIONS GUESTS WOULD VISIT FOR (%): GLOBAL vs REGION



OPERATOR TAKEAWAY

Match your marketing and packaging to these occasions: celebration and birthday packages, corporate and team bundles, and family offers — each with its own assets and messaging.

AFFLUENT, ADULT AND FAMILY-LED

VR is not a teenage niche. VR interest is high across every household type and peaks with families: partner-and-children homes (94%) are the largest single group and the keenest to book family outings and birthdays. Interest rises with income, so the keenest guests are often the most able to spend.

VR INTEREST BY HOUSEHOLD TYPE (% INTERESTED)

OPERATOR TAKEAWAY

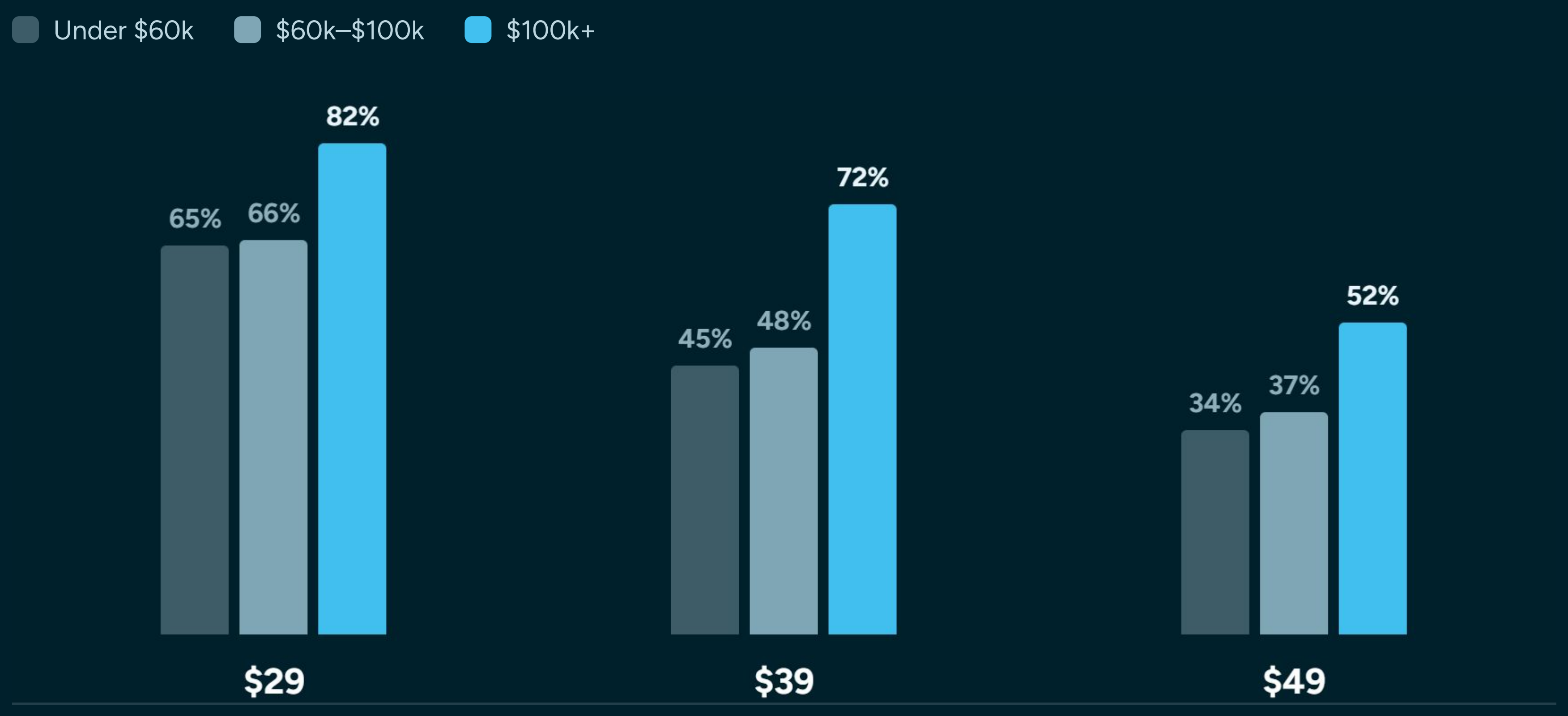
Choose VR attractions with something for every age group to capitalize on the VR boom, and keep the offering premium to draw the high-income audiences most willing to pay for it.

05 THE ANCHOR ECONOMICS

CONSUMERS ARE WILLING TO SPEND MORE ON VR THAN TRADITIONAL ATTRACTIONS

VR clears the dollar-a-minute mark for the majority of guests. At $39 for a 30-minute session, 57% still find the price appealing. And the more guests earn, the less price matters: at $49, appeal holds at 52% of $100k-plus households versus 34% under $60k, with the premium audience staying enthusiastic right up the price ladder.

PRICE APPEAL BY HOUSEHOLD INCOME (%) US ONLY. BASED ON 30 MIN EXPERIENCE



HOW TO WIN ON VALUE

Package for value
Bundle VR with other attractions to increase perceived value of the group day out.

Position quality clearly
Make it clear how your attraction differs from at-home VR.

Lower the cost of the first try
Make your VR arena visible to the rest of the venue, so passing guests can see the fun in action. And offer taster or shorter intro sessions that let newcomers feel the quality before they commit.

OPERATOR TAKEAWAY

Design your attraction mix and pricing for the premium, higher-income guest, and let quality and positioning do the justifying. Layer in peak and off-peak rates to match demand. Consider licensed IP VR experiences, which support a higher price because guests already feel a connection to the world.

WHAT MAKES A BOOKING MORE APPEALING

Asked which offers would most make them book, guests put longer play time first (49%), just ahead of group discounts (47%), with food and drink packages (40%) and loyalty rewards (37%) close behind. Tellingly, the strongest pull is more time in the experience, not a price cut, another sign this is a premium, quality-led purchase.

OFFERS THAT WOULD MAKE BOOKING MORE APPEALING (% RANKING IN TOP 3) GLOBAL

OPERATOR TAKEAWAY

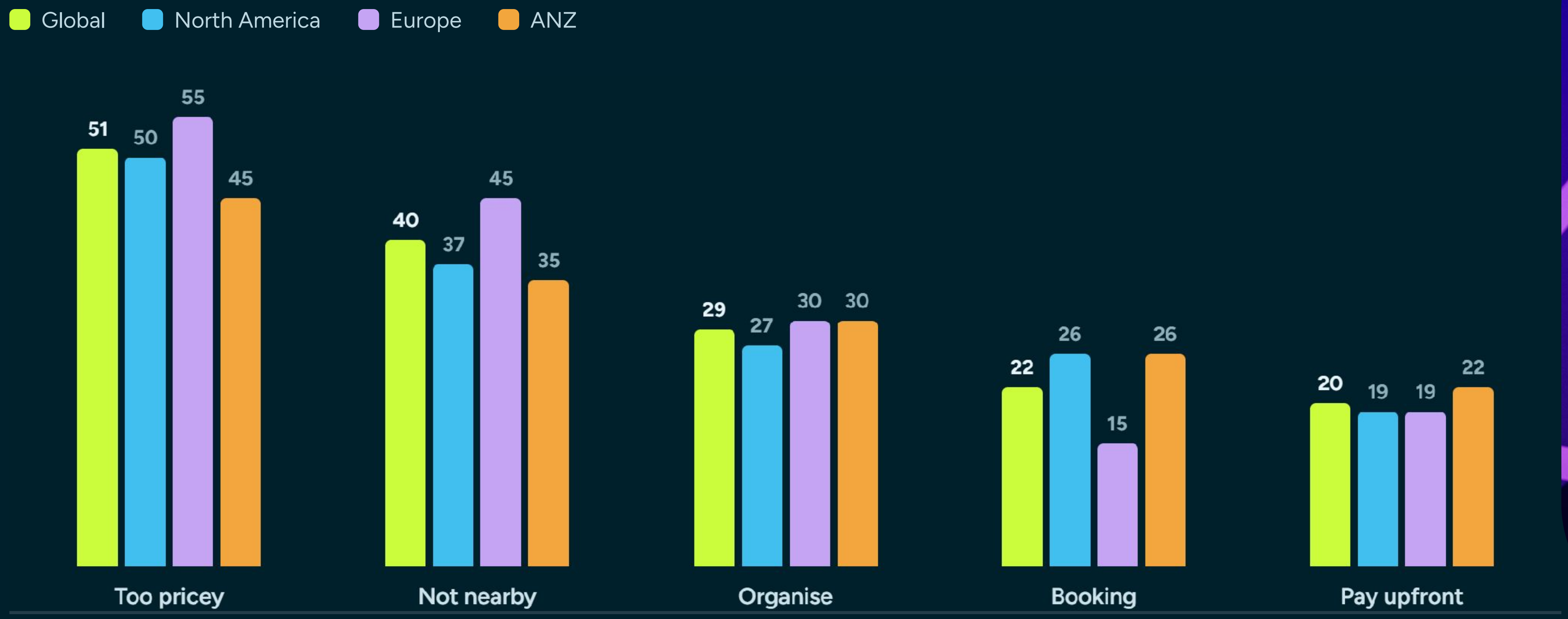
Lead with longer sessions; the category has moved well beyond the 5 to 10 minute novelty mini-game. And consider incentives tied to group size and play frequency.

06 BOOKING BARRIERS

THE BARRIERS ARE YOURS TO FIX

The barriers guests name are operational, not a lack of interest: cost perception (51%) and proximity (40%) lead, then the effort of organising a group. Europe feels least served on proximity (45%); North America and ANZ cite booking friction more.

BARRIERS TO TAKING PART IN A VR EXPERIENCE (%): GLOBAL



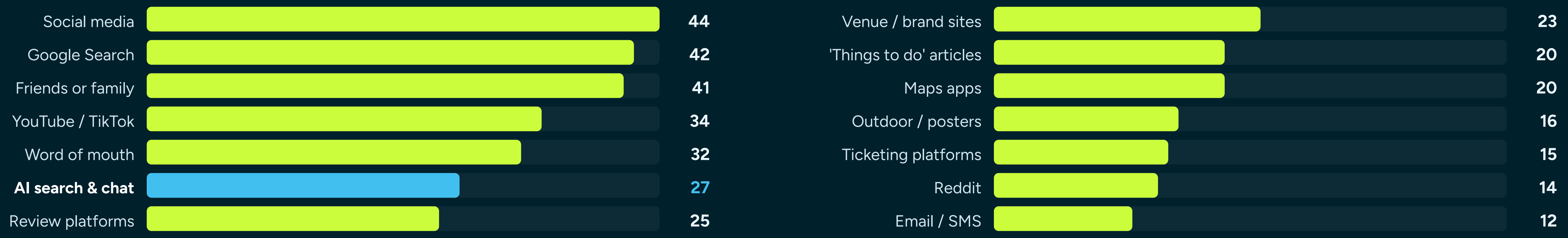
OPERATOR TAKEAWAY

Remove the practical friction with clear pricing, easy group booking, split payment and private sessions.
And check what VR nearby venues offer, then invest in the best to meet the demand they are missing.

HOW GUESTS FIND YOU, AND AI ARRIVES

Guests discover things to do through social media (44%), Google (42%) and friends and family (41%), with video close behind. A channel that did not feature in 2023 has arrived: more than a quarter now use AI tools like ChatGPT, and that is level across every region. North America is the most multi-channel market, over indexing on map apps and Reddit.

WHERE CONSUMERS LOOK FOR THINGS TO DO (%): GLOBAL



OPERATOR TAKEAWAY

Earn social and video reach to drive awareness, and encourage guests to leave reviews on Google, other review platforms and Reddit. And build answer engine optimisation into your SEO strategy, as LLMs increasingly reshape the path to purchase.

ABOUT THIS STUDY

THE LARGEST CONSUMER STUDY IN LOCATION-BASED VR

This study was conducted by independent research agency Glow, commissioned by Zero Latency VR, and first run in 2023 (n=2,318 across nine markets). The 2026 wave surveyed 2,386 people via online panel across the United States, Canada, Australia, France and Spain. Respondents were adults aged 18 to 54, balanced by gender.

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To qualify, respondents had to take part in an entertainment activity at least monthly (from gym, movies and gaming to team sports, live sport, outdoor activities and arts and crafts) and be aware of VR or immersive entertainment. The sample represents active, entertainment-engaged, VR-aware consumers.

It measures entertainment habits, category awareness, expectations, pricing, booking behaviour, barriers and reactions to VR. Where we compare to 2023, trend figures use the markets common to both waves, and where the survey design changed we compare rankings rather than absolute scores.

2,386

respondents across 5 markets and 3 regions

5

markets surveyed

2

waves: 2023 & 2026

ABOUT ZERO LATENCY VR

THE WORLD'S FIRST, BIGGEST AND BEST FREE-ROAM VR

We pioneered free-roam VR in 2015 and have delivered mind-blowing, social experiences to millions of guests worldwide.

A Zero Latency attraction opens a portal to something extraordinary: heart-pounding, wire-free adventures, from deep space to zombie showdowns to blockbuster worlds, that guests cannot get anywhere else.

Developed in partnership with HTC Vive, the system delivers ultra-sharp 5K visuals, 3D spatial audio and fully trackable controllers, for groups of up to eight at a time.

Over more than ten years we have partnered with some of the world's biggest technology brands and content studios, bringing award-winning AAA titles and licensed worlds including Jumanji, Warhammer 40,000: Space Marine, Cyberpunk and Far Cry.

A proven multi-attraction model: premium positioning, high ROI, maximum throughput and low operational complexity. Zero Latency is the chosen VR partner of entertainment centers.

150+
installs worldwide

30
countries

4.9
avg guest rating / 5

6M+
Memories Made

BRING PREMIUM FREE-ROAM VR TO YOUR FACILITY

The demand is proven. The next move is yours.
Book a consultation with our expert team.

zerolatencyvr.com