

Presence

as the product

HUMANX BY IA RETAIL

The Future of Entertainment



HumanX by IA Retail is a research initiative committed to reshaping the future of design, grounded in a deep, nuanced understanding of consumer needs, behaviors, and expectations.

In this edition, we invite you to join us as we explore the future of entertainment. Drawing from original research, emerging consumer sentiment, and project insights, we illuminate what's next for experience-driven spaces.

As attention spans shrink and expectations rise, physical environments must rise to meet the moment. We examine how spaces can evolve into responsive, immersive ecosystems—places that intuitively engage across generations and contexts, where presence itself becomes the product.

Foreword

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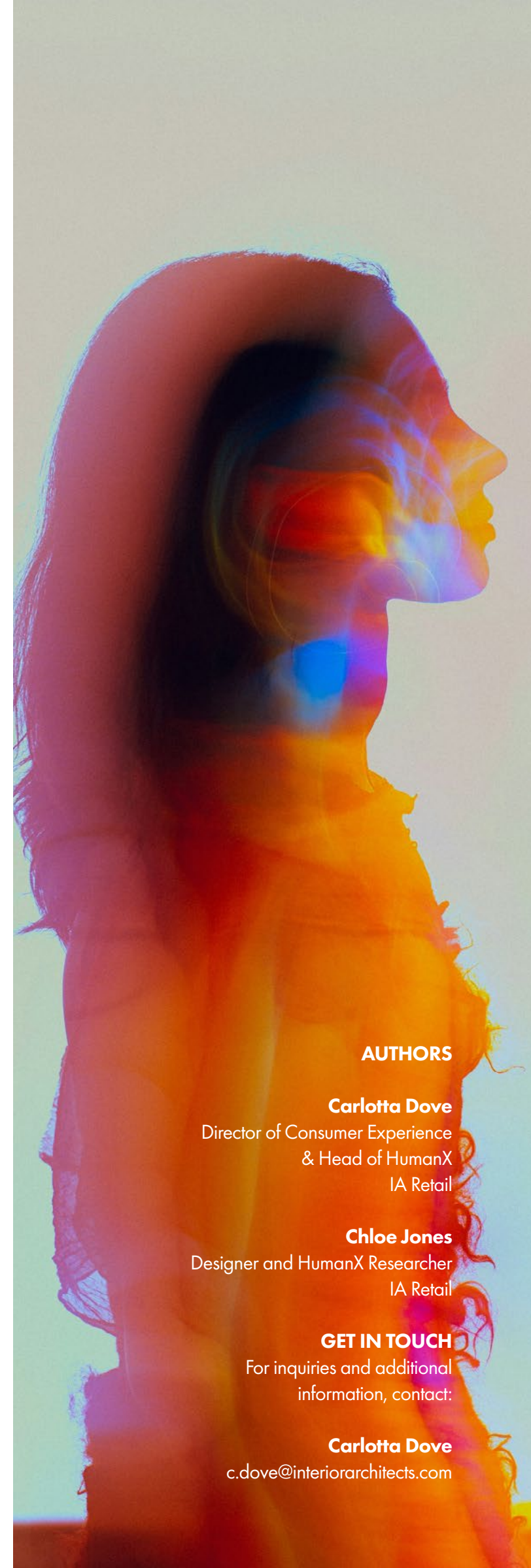
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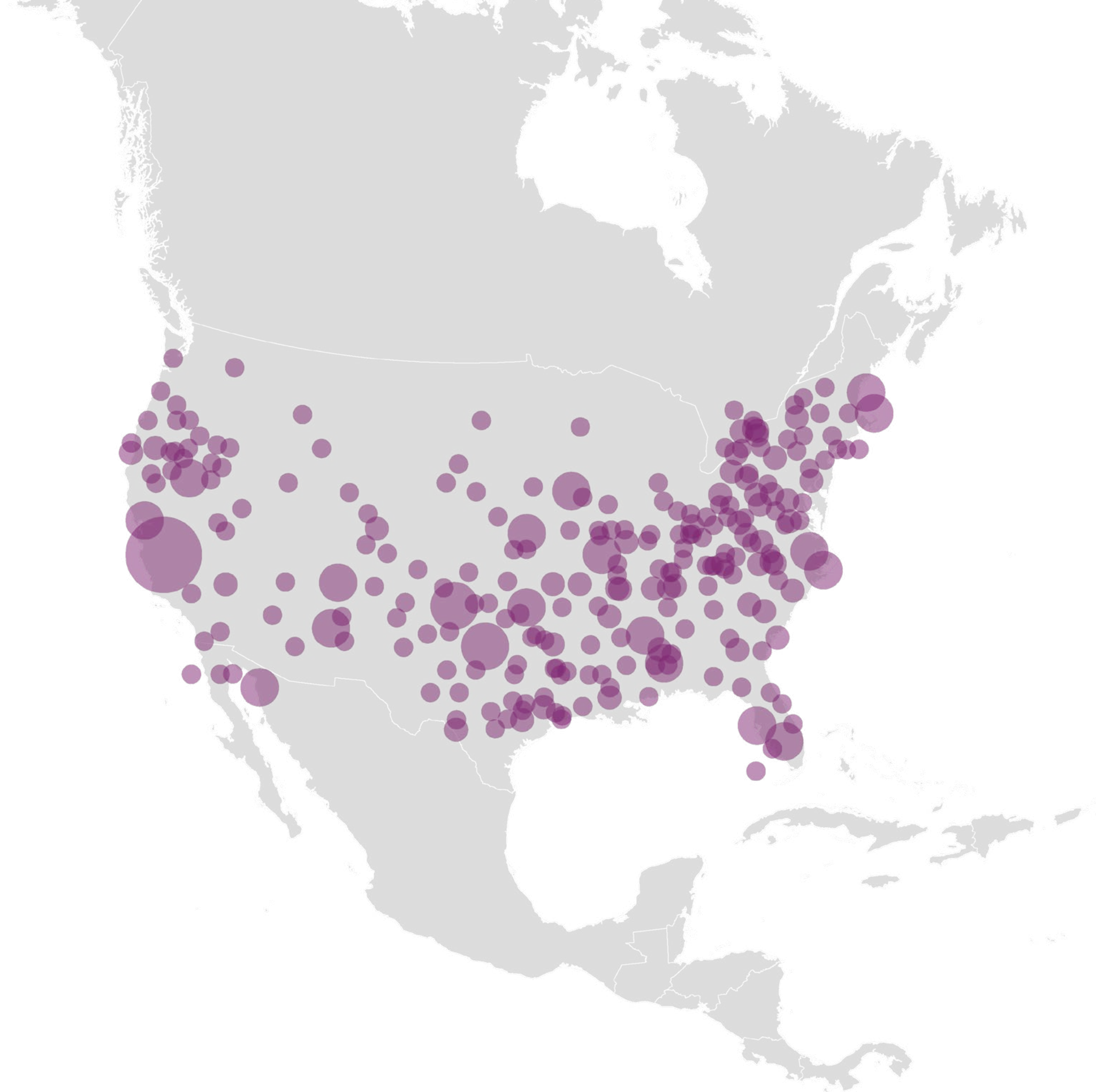
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Audience Reach. To uncover the shifting expectations redefining the current entertainment landscape, we surveyed over 400 U.S. respondents in a nationally representative study.

Our objective is to identify the emotional motivations, emerging behaviors, and experience-led priorities that shape how audiences engage with entertainment spaces, and what keeps them coming back, now and in the future.

Audience Insights. Younger audiences aren't just seeking entertainment, they're seeking presence: raw, real, and shared in the moment.

01



Unscripted Moments

As digital habits rewire our brains for constant input, **real-world spaces must now rival the dopamine rush of screens.** More change. More awe. More now.

02



Stimulation Seekers

Inspired by new concepts of fandom, shared escapism, and collective moments that offer emotional release, **play and presence are on the rise.**

03



Parallel Play

Inspired by new concepts of fandom, shared escapism, and collective moments that offer emotional release, **play and presence are on the rise.**



01 Unscripted Moments

Younger audiences are turning away from aesthetic sameness. They crave spaces that feel human, imperfect, spontaneous, and emotionally textured.

The design challenge is to **create environments that feel real**, supporting unplanned interaction, emotional resonance, and flexible layouts that invite spontaneity over perfection.



TOP MOTIVATORS FOR VISITING ENTERTAINMENT SPACES



“No matter what entertainment I’m looking for, the experience as a whole needs to be inclusive, authentic and feel deeply human. I don’t like forced, perfected fun.”

GEN Z RESPONDENT



“I want more than just another fun thing to do. Entertainment spaces should help me connect with others in a deeper, more genuine way, and feeling and seeing people I relate to and who understand me.”

GEN ALPHA RESPONDENT



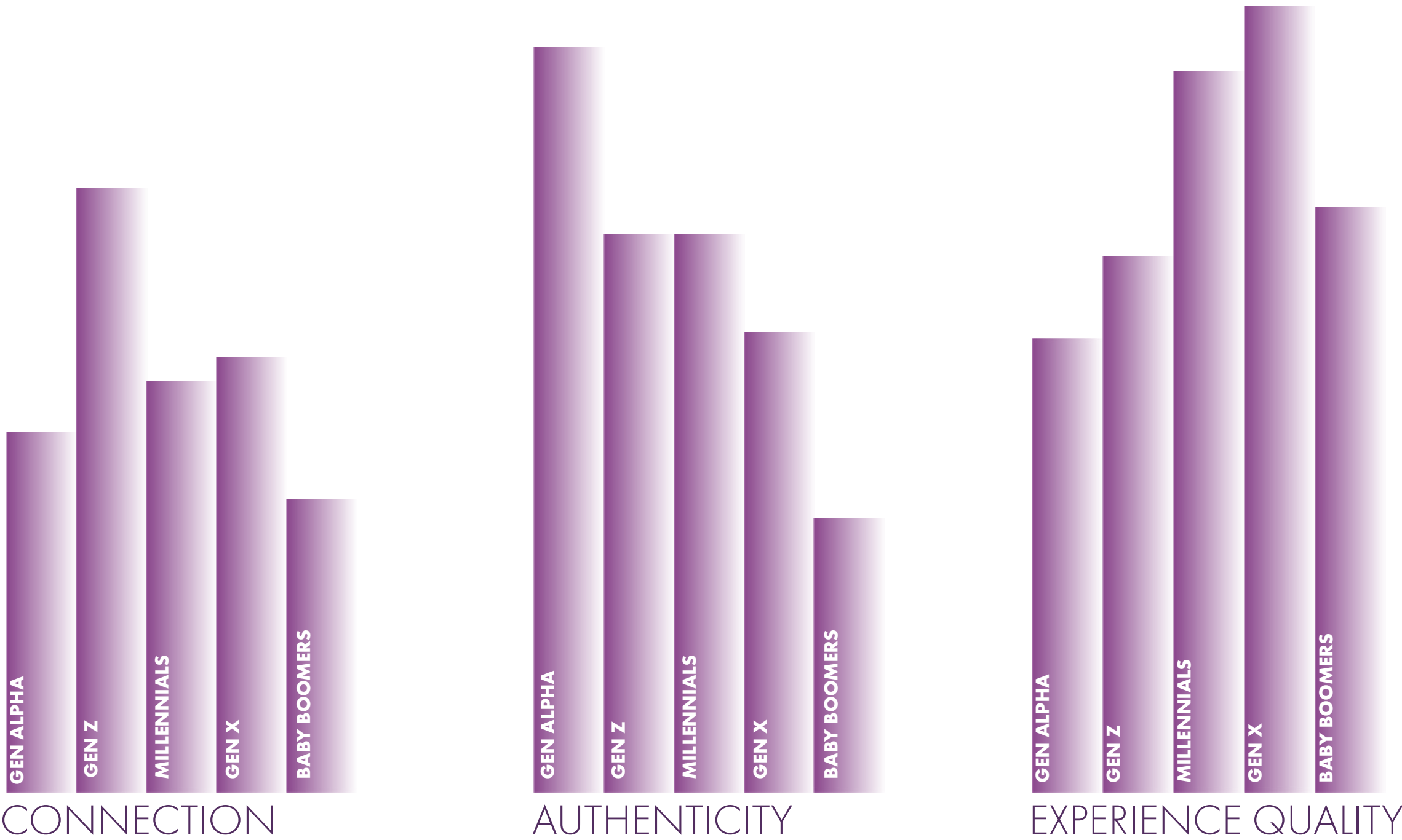
TOP MOTIVATORS FOR VISITING ENTERTAINMENT SPACES

Generational preferences around entertainment are shifting. Younger audiences crave authenticity. Older generations value quality and comfort. Everyone seeks connection.

Younger audience, particularly Gen Z and Gen Alpha, gravitate toward authenticity, favoring design, programming, and brand expression that align with personal values and cultural relevance.

Older generations, including Gen X and Boomers, tend to prioritize quality of experience, citing comfort, service, and atmosphere as key reasons for returning.

Across all age groups, social connection remains a consistent motivator, with Gen Z showing the strongest affinity.



TOP MOTIVATORS FOR VISITING ENTERTAINMENT SPACES



Gen Z & Gen Alpha

Unscripted Moments

- 75% of Gen Alpha prioritize real, in-the moment experiences
- 59% of Gen Z value emotionally resonant, shareable moments
- Both generations are rejecting overly curated environments in favor of authenticity and spontaneity

ENTERTAINMENT SPACE PRIORITIES

Flexible and interactive spaces, with emotionally engaging storytelling elements and zones that foster play, social connection, and self-expression.



Millennials

Connection Cravers

- 56% of Millennials prioritize creative and skill building environments
- Millennials prefer authenticity, connection, and experience quality in equal prioritization

ENTERTAINMENT SPACE PRIORITIES

Comfort, intuitive flow, and refined amenities that support ease, reliability, and a polished overall experience.



Gen X & Boomers

Curated Comfort

- 72% of Gen X and 66% of Baby Boomers prioritize polished, dependable experiences
- Both generations value comfort, consistency, and environments that feel intentional and well-executed

ENTERTAINMENT SPACE PRIORITIES

Quality of amenities food and drink options. Nicely designed lounge spaces, restrooms and spaces that promote access and ease.

02 Stimulation Seekers

For Gen Z and Gen Alpha, dopamine isn't just about pleasure, it's about seeking. Raised on constant scroll, they respond to novelty, surprise, and social validation.

Millennials crave meaning behind the moment. Challenge, learning, and emotional depth still matter.

The design challenge? Craft spaces that spark emotion, invite discovery, and keep pace with a digitally primed brain.



TOP DOPAMINE DRIVERS FOR VISITING ENTERTAINMENT SPACES



"I want to walk in and feel something instantly, like the energy is alive and anything could happen."

Gen Z Respondent



"I love experiences that push me just outside my comfort zone. Exciting, unpredictable, and full of adrenaline."

Millennial Respondent



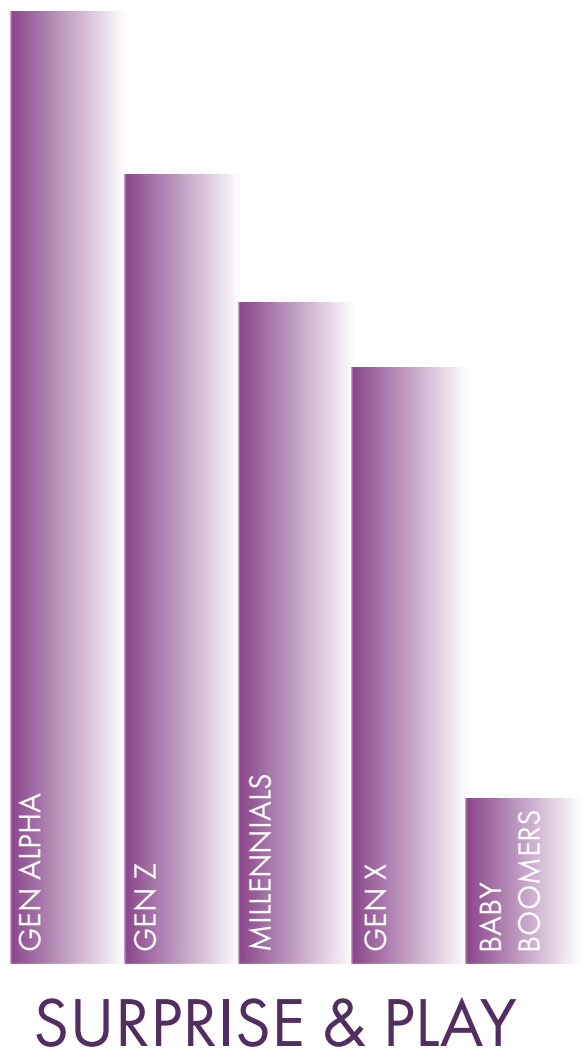
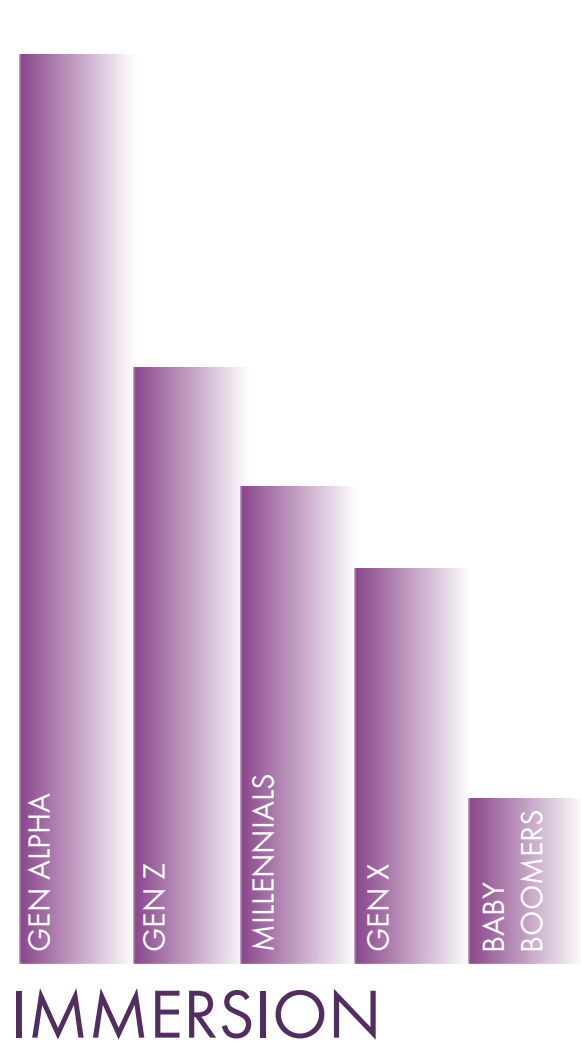
TOP DOPAMINE DRIVERS FOR VISITING ENTERTAINMENT SPACES

Stimulation isn't one-size-fits-all. What sparks curiosity for younger audiences is immersion and unpredictability, while older generations seek meaning and depth.

Different generations are triggered by distinct forms of stimulation. For Gen Alpha and Gen Z, dopamine is sparked through immersion, novelty, and playful unpredictability.

These younger cohorts are drawn to multi-sensory design, gamified layers, and spatial storytelling that encourages exploration, surprise, and play.

In contrast, Millennials, Gen X, and Boomers show a stronger affinity for meaning-driven experiences, where challenge, discovery, and cognitive stimulation provide the reward.



TOP DOPAMINE DRIVERS FOR VISITING ENTERTAINMENT SPACES



Stimulus Chasers

- 62% Gen Alpha, and 49% Gen Z cite surprise and playful discovery as their biggest dopamine drivers
- Being fully immersed and transported to a new environment emerged as the second largest dopamine driver for both generations (50% & 36%, respectively)

ENTERTAINMENT SPACE PRIORITIES

Ever-changing, emotionally charged spaces that feel spontaneous and interactive - designed for discovery, surprise, and share-ability.



Immersion Control

- 43% of Millennials prefer learning and challenges as a dopamine driver
- Spontaneous joy still plays a role, especially for Millennials

ENTERTAINMENT SPACE PRIORITIES

Comfort, intuitive flow, and refined amenities, supporting ease, reliability, and a polished overall experience.



Learning & Familiarity

- 43% of Boomers cite learning and mental challenges as a primary driver as well but with much lower emphasis on surprise
- While compared to Millennials, Gen X enjoys spontaneity but within more structured, familiar formats

ENTERTAINMENT SPACE PRIORITIES

Clarity, comfort, and cognitive engagement. Prioritize spatial logic, layered storytelling, and environments that reward focused attention over stimulation.

03 Parallel Play

For Gen Z and Gen Alpha, connection isn't built through conversation—it's forged through shared immersion. From fandoms to competitive socializing and sober-curious formats, bonding now happens through doing, not talking.

The design challenge? Create spaces that foster collective presence, playful participation, and new ways of connecting without the social pressure.



SHIFTING SOCIAL PREFERENCES IN ENTERTAINMENT SPACES



"Being immersed in competitive challenges and testing out the newest and most innovative technology."

Gen Z Respondent



"I'm most engaged when I'm learning something by doing. Give me immersive, hands-on experiences, paired with great food and drinks I haven't tried before."

Gen Z Respondent

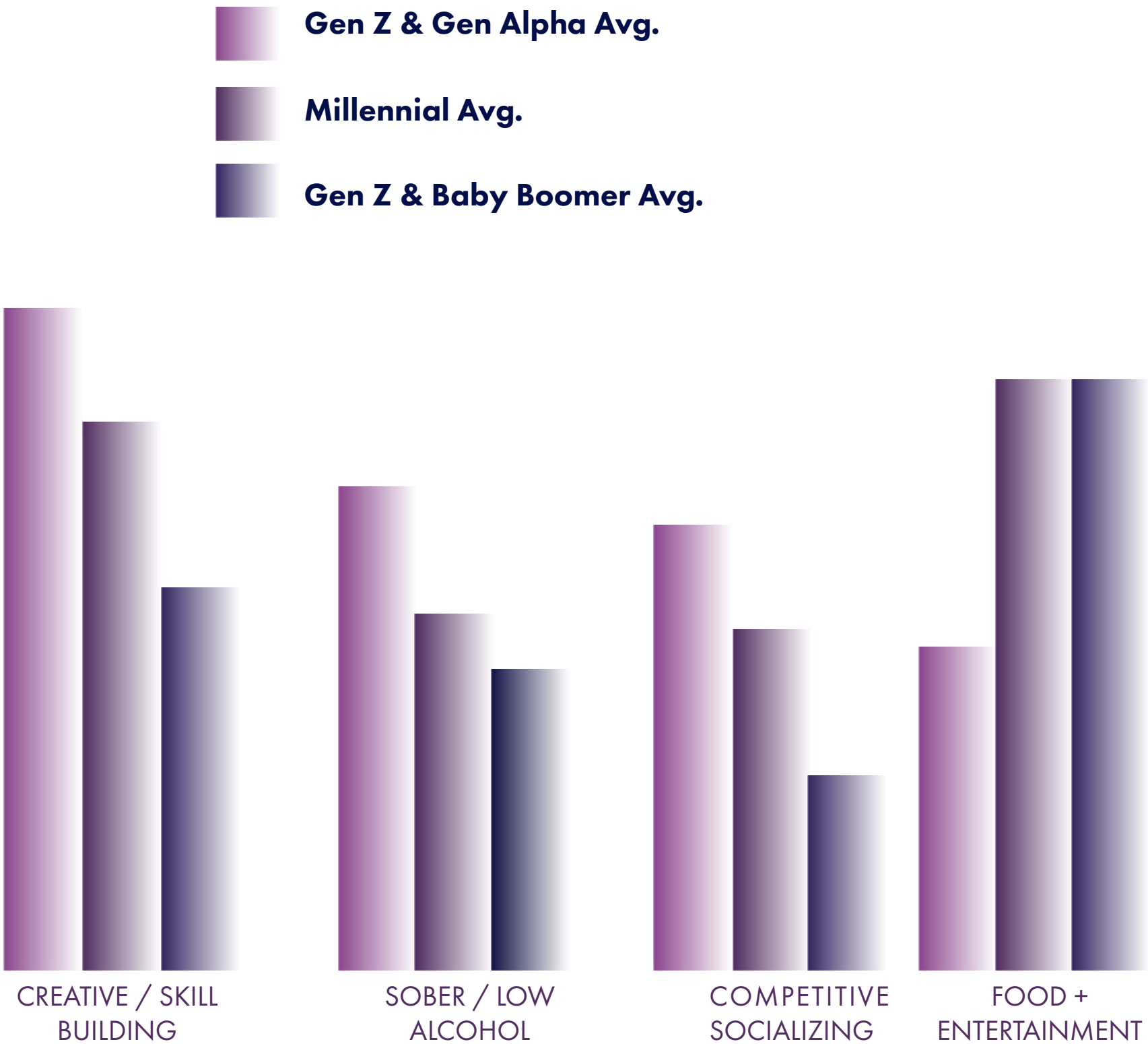


SHIFTING SOCIAL PREFERENCES IN ENTERTAINMENT SPACES

Socializing is evolving. Younger generations are redefining connection through creativity, intention, and presence—not just consumption.

Attitudes toward socializing are moving beyond traditional formats and passive consumption toward experiences that emphasize creativity, intention, and shared participation. Gen Z and Gen Alpha are leading this shift, favoring creative, skill-building activities and low- or no-alcohol formats that prioritize presence, self-expression, and social fluidity.

Millennials envision the ideal entertainment space that merges culture, curation, and comfort. Gen X and Boomers, by contrast, show a continued preference for entertainment that revolves around high-quality food, drink, and hospitality.



SHIFTING SOCIAL PREFERENCES IN ENTERTAINMENT SPACES



Gen Z & Gen Alpha

Stimulus Chasers

- 63% of Gen Alpha and 70% of Gen Z are spending more time on creative or skill-building activities
- 63% of Gen Alpha report more time spent on competitive group activity
- Sober or low-alcohol formats resonate for Gen Z

ENTERTAINMENT SPACE PRIORITIES

Flexible, side-by-side environments that support creativity, casual competition, and low-pressure connection.



Millennials

Immersion Control

- 64% of Millennials prefer food and entertainment as a priority in new social preferences
- Millennials still enjoy creative environments and competitive socializing similar to those of Gen Alpha and Gen Z

ENTERTAINMENT SPACE PRIORITIES

Activities and spaces with depth and takeaways that offer a chance to learn or improve a skill within a food forward experiences.



Gen X & Boomers

Learning & Familiarity

- Food and entertainment is the strongest shared priority across this group: 61% of Gen X and 66% of Boomers are spending more time here
- Low-alcohol socializing is more common with Millennials (37%) and Gen X (33%), while Boomers show lower engagement

ENTERTAINMENT SPACE PRIORITIES

Prioritize hospitality-driven settings with structured flow and ambient comfort. Spaces that support conversation, relaxation, and familiar rituals.

Experience Drivers. Memorable spaces thrive on spontaneity, flexibility, and cultural resonance.

01



Spatial Serendipity

Design moments are crafted as conversation starters and memory makers, offering playful surprises that invite interaction, discovery, and shared story telling. Sensory shifts keep curiosity alive and promotes reflection.

02



Elastic Ecosystems

Zones that adapt and transition offer a customizable experience which empowers guests to engage on their own terms. Spaces can fluctuate with range based on mood, times of day, activity preference, and evolving behavior.

03



Resonance & Belonging

Emphasizing cultural anchors and tapping into stories and nostalgia of local spaces to highlight in the experience of place heightens human engagement. Authenticity, purposeful moments of pause and presence create the environment.

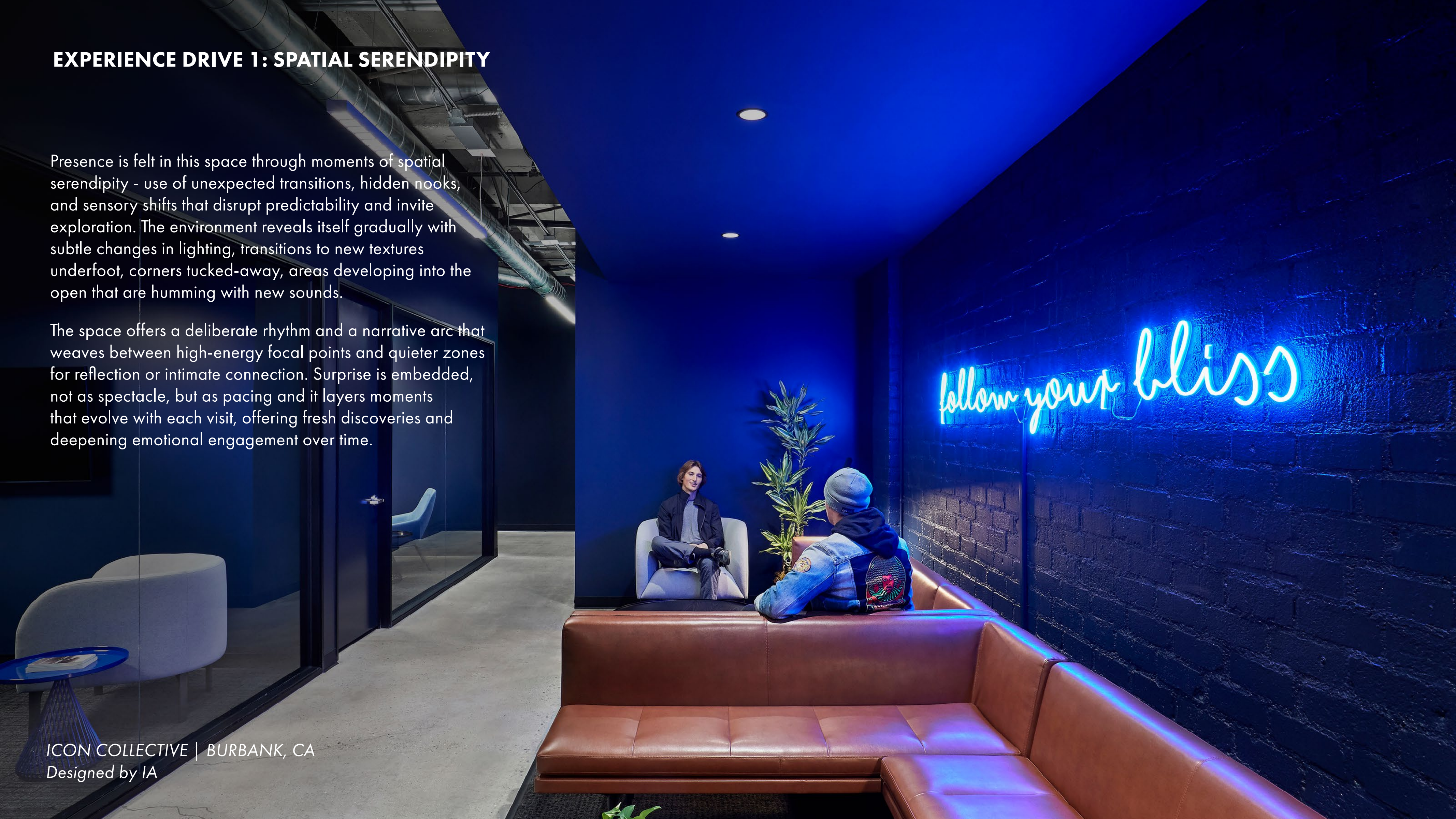


EXPERIENCE DRIVE 1: SPATIAL SERENDIPITY

Presence is felt in this space through moments of spatial serendipity - use of unexpected transitions, hidden nooks, and sensory shifts that disrupt predictability and invite exploration. The environment reveals itself gradually with subtle changes in lighting, transitions to new textures underfoot, corners tucked-away, areas developing into the open that are humming with new sounds.

The space offers a deliberate rhythm and a narrative arc that weaves between high-energy focal points and quieter zones for reflection or intimate connection. Surprise is embedded, not as spectacle, but as pacing and it layers moments that evolve with each visit, offering fresh discoveries and deepening emotional engagement over time.

ICON COLLECTIVE | BURBANK, CA
Designed by IA



EXPERIENCE DRIVE 1: SPATIAL SERENDIPITY

Hidden layers, subtlety, and mystery come to life through secret passageways, concealed sensors, and playful moments of surprise. Designed as a rhythm of space meant to be uncovered rather than simply seen, the environment invites deeper engagement and fosters authentic presence.

ICON Collective highlights the student experience as the key to unlocking a unique creative process. In this high-functioning space, the energy of its students takes center stage.

ICON COLLECTIVE | BURBANK, CA
Designed by IA

DESIGN DRIVER 2: ELASTIC ECOSYSTEMS

Use of modular and scalable designs (such as prefab or plug-and-play elements) promotes spaces that adapt to site size, time of day, guest flow, and evolving behaviors. This maximizes the space as an elastic ecosystem.

The space should not force a single mode of engagement; rather, it should empower people to choose their preferred level of interaction—whether active or passive. Adaptable zones with time-based transitions and customizable experiences allow guests to engage on their own terms, encouraging mindful presence.



DESIGN DRIVER 2: ELASTIC ECOSYSTEMS



This means building with scalable, elastic infrastructure, fluid transitions, and sensory cues that support shifting moods, demographics, and behaviors. Flexibility is not just about layout; it is about creating spaces that respond in real time to presence, preference, and pace. Younger customers seek open-ended exploration, while older visitors gravitate toward narrative clarity, expert framing, and optional depth.

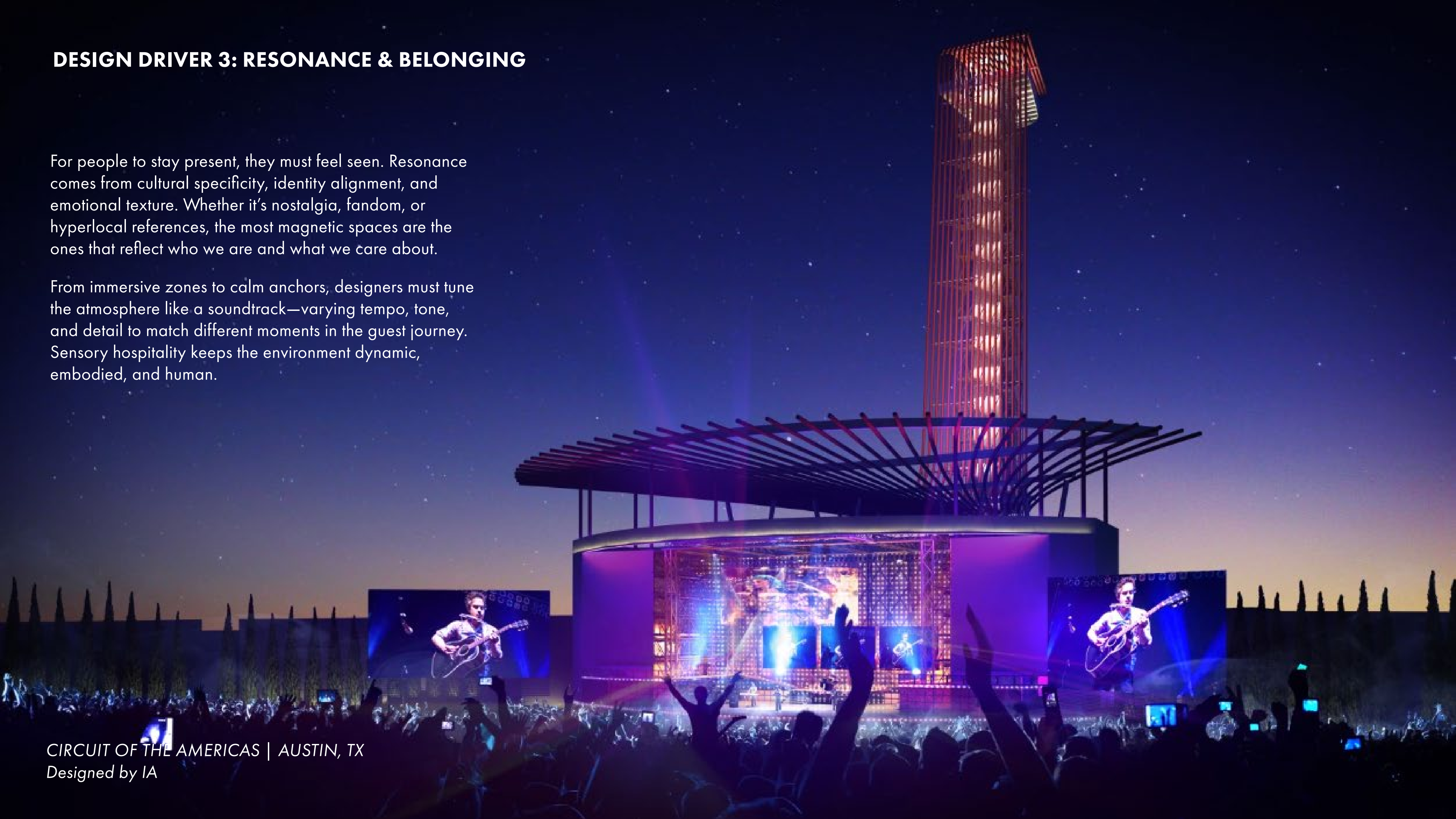
Puttshack prioritizes pre-fab modular putt-putt stations designed for flow, not just fixed moments. Plug-and-play designs enable activation and adaptability across different site sizes, support quick rollout procedures, and allow room for community-driven growth.

DESIGN DRIVER 3: RESONANCE & BELONGING

For people to stay present, they must feel seen. Resonance comes from cultural specificity, identity alignment, and emotional texture. Whether it's nostalgia, fandom, or hyperlocal references, the most magnetic spaces are the ones that reflect who we are and what we care about.

From immersive zones to calm anchors, designers must tune the atmosphere like a soundtrack—varying tempo, tone, and detail to match different moments in the guest journey. Sensory hospitality keeps the environment dynamic, embodied, and human.

CIRCUIT OF THE AMERICAS | AUSTIN, TX
Designed by IA



DESIGN DRIVER 3: RESONANCE & BELONGING

This is about the orchestration of culture. Seating clusters around a shared meal, a projection wall, or a listening station invite communal experience, while the edges offer more intimate zones for reflection or quiet conversation. Circulation feels intuitive, with curved forms and slow thresholds that draw people inward.

Physical cues signal shared culture and story: art by local creators, soundscapes rooted in community, and tactile materials that evoke memory. People are encouraged to leave traces, turning the space into a living archive of those who pass through. With more connection comes deeper presence.

COTA captivates both local and international visitors by drawing from Texas culture and the F1 community, elevating the atmosphere and shaping a distinct user experience.

As location-based entertainment becomes more crowded, brands need a distinctive twist and continuous evolution to keep audiences coming back.

The spaces that succeed are those that balance seemingly opposing needs: authentic and uncurated, yet awe-inspiring and constantly evolving. They tap into our growing desire to connect through shared moments and niche communities.

The most valuable offering these spaces provide is the experience of being fully present. By placing human connection at the center, they become stages for play, self-expression, and genuine interaction, creating environments where people don't just consume, but truly belong, and where returning feels like coming back to something alive.

Afterword

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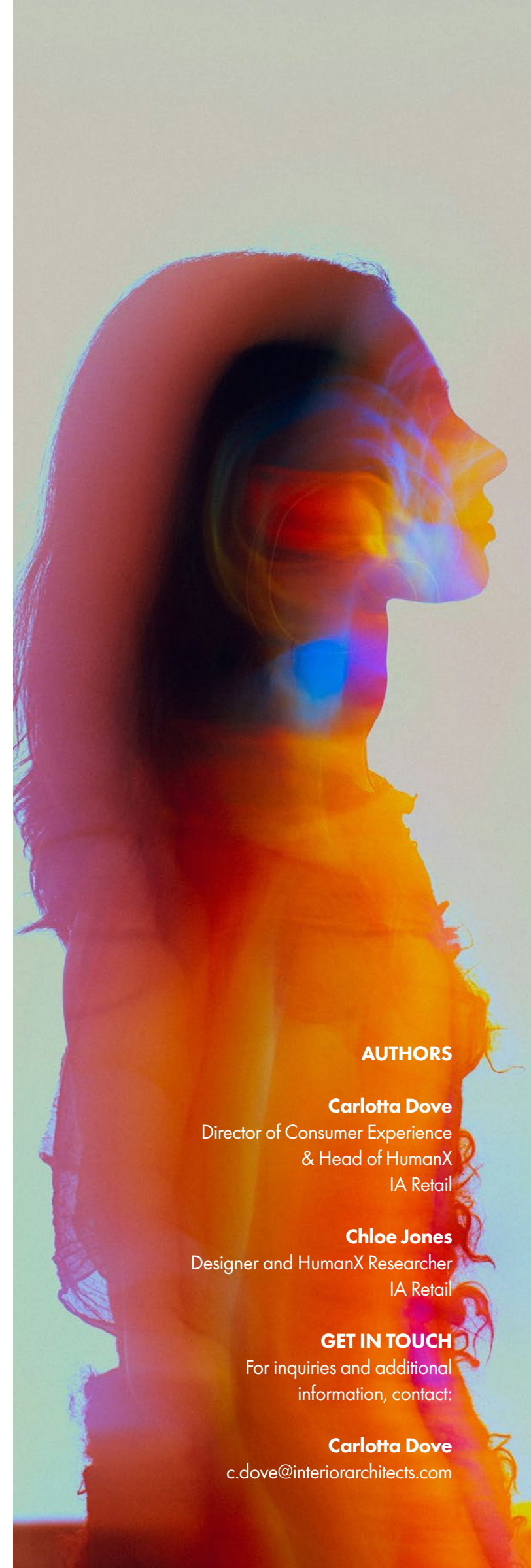
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