



2008

Attraction Attendance Report

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Themed Entertainment Association/Economics Research Associates' Attraction Attendance Report 2008

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Summary

A compilation of essential information for the industry

“Theme park and amusement park operators, developers, vendors, consultants, designers, and others in the visitor attractions industry need good information to build their businesses and make balanced decisions - now more than ever,” says TEA President Steve Thorburn of Thorburn Associates. “The industry numbers provided by the TEA/ERA Attraction Attendance Report are a resource that will help us all to work better and smarter in 2009 and to plan wisely for 2010. They are also relied upon by journalists, and are closely watched by parks enthusiasts.”

The TEA/ERA Attraction Attendance Report identifies the top commercial theme parks and waterparks around the world and reflects their performance in 2008. Global attendance data is broken down by geographic region, by chain and by type of venue. This vital report is issued annually and jointly produced by the TEA (Themed Entertainment Association) - the leading international trade alliance for the creators of compelling experiences and places - and ERA (Economics Research Associates) - a top international consulting firm providing economic analysis for the entertainment and leisure industry worldwide.

Destination parks hit harder than regional parks by the recession...

“It is typical of destination parks to be impacted more by a recession than regional parks, because they are located farther away from their markets, and cost more to visit,” states John Robinett, Senior Vice President of ERA. “But it should also be noted that the negative growth didn’t actually occur until the fall. The regional parks were mostly closed by then while year-round destination parks were still open, so they took the fourth-quarter hit.”

The above was evident in Europe as well as the US. ERA Director Lesley Morisetti notes, “In 2008, the European parks that are reliant on people taking a longer holiday were hit hardest because those locations are getting fewer visitors. Historically, in a recession the urban parks do much better than the resorts and tourist area parks, because people are more likely to take less costly day trips.” But, she adds, “They must continue to provide what the customer perceives as good value for the money.”

Overall, the numbers and the economy are pointing to lower attendance in 2009. “The decline looks as though it will last the majority of 2009 with some possibility of recovery by the end of the year or early 2010,” observes Edward Shaw, ERA Senior Associate.

Asia and especially China are bright spots with growing economies and an expanding middle class in the medium- to long-term. The region is very far from saturated and its performance is different from more mature markets. “There is lots of activity in theme parks, resorts, cultural facilities and other entertainment in Greater China, and the country’s economy, which has been

growing by double digits since the early 1990s, is still projected to grow 6-8% this year,” observes Christian Aaen, Managing Director of ERA’s new office in Hong Kong. India holds promise for the future. “India has historically kept out foreign investment but is now letting it in,” says Robinett. “The banking sector there is highly regulated so it wasn’t hit quite as hard.”

“We believe a lot of growth in the industry going forward will be in Asia,” says Ray Braun, Senior Vice President, ERA

Christian Aaen of ERA Hong Kong, notes that there is “a lot of development in the pipeline in Asia, including Legoland Malaysia, announced recently with a target opening in 2012, a Universal theme park on Sentosa Island opening in late 2009/10, and new KidZania attractions opening in Japan and Korea and planned elsewhere in Asia.”

...and Reinvestment and Research still rule

Because of the role they play as an interlude from the pressures of daily life, parks and attractions tend to fare relatively well during a recession. It’s a good position to be in but requires an effort to maintain, in light of the changing economic environment and the evolving customer viewpoint. “Our models suggest that reinvestment probably has a stronger correlation with attendance than does the economy,” remarks Robinett. “When parks reinvest in a major new ride or show or zone, the increase in attendance tends to be in the high single digits, whereas a recession impacts in the low single digits.”

In Japan, attendance numbers for parks were mostly flat or down, with the notable exception of Tokyo Disneyland (TDL) and Tokyo Disney Sea (TDS). “These two parks combined had

another record year, sparked mainly by the 25th anniversary of Tokyo Disneyland but also helped by investment in strong marketing and new attractions,” said Christian Aaen. “TDL’s performance was counter-cyclical and impressive.”

Based on ERA’s observation of past recessions, recovery is the reward of reinvestment: “Parks tend to bounce back rather quickly from a recession,” says Robinett. “You don’t see three-year drops; you see one- or two-year drops and then they bounce back.” If it is not the time to develop or open a new ride, attraction or area, a park can still reinvest in training, customer service, maintenance, marketing - and revisit its pricing structure. And, it can prepare for the future.

“The down times are a perfect time to start planning and implementing reinvestment, and to look at ways of improving your product and the customer experience,” explains Robinett. “You have staff that may be underutilized, you have all the vendors and planning consultants who need work and have lower prices, you can buy materials at a cheaper rate. Smart money comes in at the bottom of a cycle.”

David Camp, Director, ERA Europe/Middle East/Africa, emphasized the need to constantly check in with the customer. “The industry in Europe experienced a fairly stable year, but with only a modest increase and a lot of concern for the future. Parks should monitor customers’ perception of value for money by conducting research, including regular customer surveys, and being reactive to them.”

Some key figures and information from the report

(All figures are for calendar year 2008 unless otherwise indicated.)

- 122.7 million: Total visits to the top 20 parks in North America, level with the performance in 2007. Between 2005 and 2008 the top 20 North American parks grew by a total of 3.9 percent.
- 57.4 million: Attendance for the top 20 European parks, representing a growth rate of 1.1 percent. Attendance growth of 7.6 percent from 2005-2008 for top European parks.
- 12.2 million: Visits to top 10 parks in Mexico and Latin America
- 66.9 million: Total attendance to top 10 Asian/Pacific Rim parks
- 186 million: The total theme park attendance for top 25 worldwide parks in 2008, down 0.4% from 2007
- 12.5 million: Combined visitation to the top 15 US waterparks, a growth of 1.8 percent from 2007
- 20.2 million: Total attendance to top 20 worldwide waterparks, up 5.6 percent from 2007.

Regional Synopses

North America (see chart p. 6)

“While faring well the first part of the year, many of the major parks saw a poor fourth quarter due to the recession. Destination parks, of which there are many in our Top 20, were hit harder than regional parks. This is typical in a downturn when consumers choose the lower cost, closer-to-home attractions. Many of the regional parks were closed for the fall and dodged the recession bullet, while the year-round destination parks suffered.” – John Robinett, Senior Vice President, ERA

Europe (see chart p. 7)

“While much of Europe stood still in 2008, strong marketing and strategic investment for the 15th Anniversary of Disneyland Paris saw attendance growth at both the Disney parks.” – David Camp, Director, ERA

“In the past, recession has hit the parks most reliant on holiday tourists the hardest, as long holidays give way to shorter breaks and day visits. Attendance at regional and local parks has tended to hold up as a result. 2009 is likely to be challenging for everyone in terms of revenues, but the local and regional parks should perform the strongest in terms of attendance.” – Lesley Morisetti, Director, ERA

Middle East

“Most projects in Dubai and the United Arab Emirates have been stopped due to the global economic downturn. This is something of a blessing in disguise. Initial plans were probably too aggressive and likely to have led to an oversupply. The ultimate result will likely be more aligned with market realities.” – David Camp, Director, ERA

Asia/Pacific Rim (see chart p. 7)

“In Japan, the Tokyo Disneyland Resort’s two parks achieved an impressive record season of 26.8 million due to the strong impact of Tokyo Disneyland’s 25th anniversary celebration events, new attractions and effective regional marketing despite the economic downturn. Ocean Park in Hong Kong continued its stellar performance, exceeding last year’s record attendance up 2.2 percent to above 5 million, fueled by ‘Year of the Panda’ and 5 effective seasonal events. Hong Kong saw continued growth in tourism from Mainland China despite some visa restrictions and other impacts on travel. Hong Kong Disneyland is re-bounding from the last couple of years’ lower than expected attendance, up almost 8 percent to 4.5 million. Lotte World reopened in Seoul this year after having been closed 6 months for improvements. China’s Happy Valley chain of regional parks continues to expand and do well.”

“Most operators in Asia are cautiously optimistic for 2009. With the continued strong growth of the middle class in China and fundamentals in other markets, we expect significant development opportunities for the leisure and tourism industry in Asia, driven by Greater China.” – Christian Aaen, Managing Director, ERA

Mexico/Latin America (see chart p. 8)

“The 2008 season was challenging for most operators in Mexico and Latin America, with 5 out of 10 operators reporting declines in attendance with any significant reinvestment and difficult economic conditions. KidZania in Mexico City maintained its attendance and El Salitre Magico in Colombia and Parque de la Costa in Argentina exhibited good growth.” – Christian Aaen, Managing Director, ERA

Waterparks (see charts pgs. 10 & 11)

“U.S. waterparks were hit hard in the second half of 2008, as the recession wiped out gains from the first part of the year. Aquatica, which opened in March, was a bright spot, as it exceeded its opening year attendance target and grew the Orlando market.” – Edward Shaw, Senior Associate, ERA

“Several Asian waterparks performed well in 2008. Chimelong Waterpark continued its strong growth, with expansion of the waterpark adding new attractions and capacity, which led to a 14 percent increase in attendance. This makes Chimelong the highest attended waterpark in Asia, just surpassing Everland’s Caribbean Bay in Korea. Caribbean Bay managed to increase attendance with the strong opening of a new attraction, “Wild River,” which was popular in the domestic market. Ocean World also had a record year up 40 percent.” – Christian Aaen, Managing Director, ERA

Amusement/Theme Park Attraction Chains (see chart p. 8)

“The standouts were Merlin Entertainments and Parques Reunidos. Merlin was up an estimated 3 million, and Parques Reunidos’ acquisition of Palace Entertainment produced a big attendance jump from 12 million in 2007 to 24.9 million in 2008. Disney was up 1.5 million and Universal was down slightly, while Six Flags showed a small increase. In Asia, OCT Parks in China joined the Top 10 as no. 8 with 13.4 million” – Ray Braun, Senior Vice President, ERA

“In general, chains were either flat or slightly up, in line with the trends in their respective regions: North American parks were hit by the recession somewhat earlier than Asia, Mexico/Latin America and Europe. Overall, strong numbers in the first part of the year managed to balance out the weakening in the fourth quarter.” – Edward Shaw, Senior Associate, ERA

Top 20 Amusement Parks/Theme Parks North America (2008)

Rank	Park and Location	2008 Attendance	% Change	Comments
1	MAGIC KINGDOM at Walt Disney World, Lake Buena Vista, Florida	17,063,000	Flat	Extended "Year of a Million Dreams" marketing campaign after record attendance in 2007. Orlando tourism experienced moderate decline for year as a result of sharp decline in Q4. Welcomed 1 billionth guest in September 2008. Opened Tinkerbell attraction.
2	DISNEYLAND, Anaheim, California	14,721,000	-1.0%	No new major attraction openings. Continued "Year of a Million Dreams" campaign. Flat tourism in Southern California. Opened Tinkerbell attraction and The Innoventions Dream Home in May 2008.
3	EPCOT at Walt Disney World, Lake Buena Vista, Florida	10,935,000	Flat	Continued success of recently opened The Seas with Nemo & Friends. No major attraction openings. Increased guest spending.
4	DISNEY'S HOLLYWOOD STUDIOS at Walt Disney World, Lake Buena Vista, Florida	9,608,000	1.0%	Opened Toy Story Mania! in Summer 2008. Continued "Year of a Million Dreams" marketing campaign. Tourism flat.
5	DISNEY'S ANIMAL KINGDOM at Walt Disney World, Lake Buena Vista, Florida	9,540,000	0.5%	Record attendance season. Benefited from strong overall performance of WDW resort.
6	UNIVERSAL STUDIOS at Universal Orlando, Florida	6,231,000	0.5%	Slight attendance growth due to successful opening of The Simpsons Ride partially mitigated by the soft economy in the end of the year. Opened "Disaster - A Major Motion Picture Ride... Starring You" in January 2008.
7	SEAWORLD FLORIDA, Orlando, Florida *	5,926,000	-2.9%	Attendance slightly down due to decreased domestic tourism in latter half of year. Highly competitive market.
8	DISNEY'S CALIFORNIA ADVENTURE, Anaheim, California	5,566,000	-2.0%	Opened Toy Story Mania! to a strong reception. Continued \$1 billion park overhaul reinvestment.
9	ISLANDS OF ADVENTURE at Universal Orlando, Florida	5,297,000	-2.4%	Downward pressure on attendance due to soft economy and possibility of guests postponing visits in preparation for the 2010 opening of the Wizarding World of Harry Potter.
10	UNIVERSAL STUDIOS HOLLYWOOD, Universal City, California	4,583,000	-2.5%	Attendance negatively impacted by June fire on Universal Studios back lot and erroneous reports that fire forced the long-term closure of the theme park. Opened The Simpsons Ride. Flat tourism.
11	BUSCH GARDENS TAMPA BAY, Tampa Bay, Florida *	4,410,000	-2.0%	Opened two new attractions in 2008 - Jambo Junction in January 2008 and Jungala in April 2008.
12	SEAWORLD CALIFORNIA, San Diego, California	4,147,000	-2.7%	Despite decline in attendance, domestic market proved strong in light of weakening economy.
13	KNOTT'S BERRY FARM, Buena Park, California	3,565,000	-1.8%	Debuted new rollercoaster, Pony Express. Highly competitive Southern California market.
14	CANADA'S WONDERLAND, Maple, Ontario	3,380,000	4.0%	Behemoth roller coaster opened in May 2008 as the park's largest investment (\$26 million) in its 27 year history.
15	CEDAR POINT, Sandusky, Ohio	3,198,000	2.5%	Spent over \$5 million in capital improvements in 2008, including opening Planet Snoopy, new stage shows, and a refurbished Sandcastle Suites Hotel. Reduced ticket prices back to 2005 levels.
16	KINGS ISLAND, Kings Island, Ohio	3,126,000	2.5%	No new rides; however several of the existing rides have been renamed. In April 2009, \$22 million "Diamondback" coaster set to open.
17	BUSCH GARDENS EUROPE, Williamsburg, Virginia	3,094,000	-2.0%	After a number of new attractions opened in 2007, attendance flattened in 2008 in part due to weakening economy
18	HERSHEY PARK, Hershey, Pennsylvania *	2,842,000	-4.4%	Added the park's 11th roller coaster (Fahrenheit). Coming off strong 2007 season, high gas prices, economic uncertainty and inclement weather had an adverse impact on overall attendance.
19	SIX FLAGS GREAT ADVENTURE, Jackson, New Jersey	2,761,000	1.5%	Strong opening of The Dark Knight roller coaster and Glow in the Park Parade boosted attendance. Set to open floorless, looping coaster (Medusa renamed Bizzaro) in 2009.
20	SIX FLAGS GREAT AMERICA, Gurnee, Illinois	2,669,000	1.5%	Successful debut of The Dark Knight roller coaster. Used successful 2-for-1 promotion and reduced children's prices. Will add new water attraction (Buccaneer Battle) in 2009.

Note: Attendance figures are estimates, based on company information, annual reports, published information and from reliable TEA/ERA industry and tourism sources
Percent changes for 2008 for certain parks (noted by *) are based on adjusted/updated figures for 2007, thus not directly comparable to published TEA-ERA list for 2007/06
Source: TEA and Economics Research Associates (ERA)

Top 20 European Amusement/Theme Parks (2008)

Rank	Park and Location	2008 Attendance	% Change
1	DISNEYLAND PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France	12,688,000	5.7%
2	EUROPA PARK, Rust, Germany	4,000,000	Flat
3	TIVOLI GARDENS, Copenhagen, Denmark ¹	3,972,000	-3.4%
4	PORT AVENTURA, Salou, Spain ²	3,300,000	-10.8%
5	DE EFTELING, Kaatsheuvel, Netherlands	3,200,000	Flat
6	GARDALAND, Castelnovo del Garda, Italy	3,100,000	Flat
7	LISEBERG, Gothenburg, Sweden ¹	3,050,000	Flat
8	BAKKEN, Copenhagen, Denmark	2,700,000	Flat
9	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France	2,612,000	4.5%
10	ALTON TOWERS, Staffordshire, England	2,520,000	5.0%
11	PHANTASIALAND, Germany	1,900,000	Flat
12	LEGOLAND WINDSOR, Windsor, England	1,815,000	10.0%
13	PARC ASTERIX, France	1,800,000	11.1%
14	THORPE PARK, England	1,700,000	Flat
15	LEGOLAND BILLUND, Billund, Denmark	1,650,000	2.5%
16 =	MIRABILANDIA, Italy	1,600,000	-5.9%
16 =	FUTUROSCOPE, France	1,600,000	Flat
18	PARQUE DE ATRACCIONES, Madrid, Spain	1,500,000	Flat
19	DUINRELL/ATTRAKTIEPARK, Holland	1,356,000	0.4%
20	HEIDE PARK, Soltau, Germany	1,330,000	-5.0%

Note: '=' indicates a tie.

¹ Attendance for Tivoli and Liseberg includes Christmas market operations

² Attendance for Port Aventura is for theme park only (excl. waterpark - separate ticket)

Source: TEA and Economics Research Associates (ERA)

Top 10 Asian/Pacific Rim Amusement/Theme Parks (2008)

Rank	Park and Location	2008 Attendance	% Change
1	TOKYO DISNEYLAND, Tokyo, Japan	14,293,000	2.8%
2	TOKYO DISNEY SEA, Tokyo, Japan	12,498,000	0.7%
3	UNIVERSAL STUDIOS JAPAN, Osaka, Japan	8,300,000	-4.7%
4	EVERLAND, Gyeonggi-Do, South Korea ¹	6,600,000	-8.3%
5	OCEAN PARK, Hong Kong SAR	5,030,000	2.2%
6	YOKOHAMA HAKKEIJIMA SEA PARADISE, Yokohama, Japan *	4,555,000	-4.5%
7	HONG KONG DISNEYLAND, Hong Kong SAR *	4,500,000	7.9%
8	LOTTE WORLD, Seoul, South Korea ^{2*}	4,236,000	n.a.
9	NAGASHIMA SPA LAND, Kuwana, Japan	3,734,000	-4.5%
10	HAPPY VALLEY, Shenzhen, China *	3,180,000	-4.2%

¹ Everland attendance does not include Caribbean Bay water park visitation

² Lotte World attendance only includes theme park (adj. from previous year)-closed for first half of 2007 (renovations), re-opened July 1, 2007

Note: Percent changes for 2008 for certain parks (noted by *) are based on adjusted/updated figures for 2007, thus not directly comparable to published TEA-ERA list for 2007/06

Source: TEA and Economics Research Associates (ERA)

Top 10 Mexican/Latin America Amusement/Theme Parks (2008)

Rank	Park and Location	2008 Attendance	% Change
1	SIX FLAGS MEXICO, Mexico City, Mexico	2,020,000	-0.5%
2	PLAYCENTER, Sao Paulo, Brazil	1,600,000	Flat
3	LA FERIA DE CHAPULTEPEC, Mexico City, Mexico	1,473,000	-4.1%
4	HOPI HARI, Sao Paulo, Brazil	1,458,000	-2.7%
5	FANTASIALANDIA, Santiago, Chile	1,100,000	n.a.
6	EL SALITRE MAGICO, Bogota, Columbia	1,071,000	4.0%
7	PARQUE DE LA COSTA, Tigre, Argentina	1,036,000	9.6%
8	PLAZA DE SESAMO, Monterrey, Mexico	1,025,000	-11.6%
9	KIDZANIA, Mexico City, Mexico ^{1*}	792,000	0.3%
10	SELVA MAGICA, Guadalajara, Mexico	582,000	-17.1%

¹Changed name to KidZania from La Ciudad de los Ninos in 2008

Note: Percent changes for 2008 for certain parks (noted by *) are based on adjusted/updated figures for 2007, thus not directly comparable to published TEA-ERA list for 2007/06

Source: TEA and Economics Research Associates (ERA)

Top 10 Theme Park Chains Worldwide (2008)

Rank	Theme Park Attraction Chain	2008 Attendance (million)
1	WALT DISNEY ATTRACTIONS	118.0
2	MERLIN ENTERTAINMENTS GROUP	35.2
3	UNIVERSAL STUDIOS RECREATION GROUP	25.7
4	SIX FLAGS INC.	25.3
5	PARQUES REUNIDOS ¹	24.9
6	BUSCH ENTERTAINMENT	23.0
7	CEDAR FAIR ENTERTAINMENT COMPANY	22.7
8	OCT PARKS CHINA	13.4
9	COMPAGNIE DES ALPES (GREVIN)	9.5
10	HERSCHEND FAMILY ENTERTAINMENT	8.3

¹ Parques Reunidos acquired Palace Entertainment in 2007. Including an estimated 10 million visitors from Palace would bring the combined total to nearly 25 million (ranked no. 5)

Source: TEA and Economics Research Associates (ERA)

Top 25 Worldwide Amusement/Theme Parks (2008)

Rank	Park and Location	2008 Attendance
1	MAGIC KINGDOM at Walt Disney World, Lake Buena Vista, Florida, USA	17,063,000
2	DISNEYLAND, Anaheim, California, USA	14,721,000
3	TOKYO DISNEYLAND, Tokyo, Japan	14,293,000
4	DISNEYLAND PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France	12,688,000
5	TOKYO DISNEY SEA, Tokyo, Japan	12,498,000
6	EPCOT at Walt Disney World, Lake Buena Vista, Florida, USA	10,935,000
7	DISNEY'S HOLLYWOOD STUDIOS at Walt Disney World, Lake Buena Vista, Florida, USA	9,608,000
8	DISNEY'S ANIMAL KINGDOM at Walt Disney World, Lake Buena Vista, Florida, USA	9,540,000
9	UNIVERSAL STUDIOS JAPAN, Osaka, Japan	8,300,000
10	EVERLAND, Gyeonggi-Do, South Korea ¹	6,600,000
11	UNIVERSAL STUDIOS at Universal Orlando, Orlando, Florida	6,231,000
12	SEAWORLD FLORIDA, Orlando, Florida, USA	5,926,000
13	DISNEY'S CALIFORNIA ADVENTURE, Anaheim, California, USA	5,566,000
14	ISLANDS OF ADVENTURE at Universal Orlando, Orlando, Florida, USA	5,297,000
15	OCEAN PARK, Hong Kong SAR	5,030,000
16	UNIVERSAL STUDIOS HOLLYWOOD, Universal City, California, USA	4,583,000
17	YOKOHAMA HAKKEIJIMA SEA PARADISE, Yokohama, Japan	4,555,000
18	HONG KONG DISNEYLAND, Hong Kong SAR	4,500,000
19	BUSCH GARDENS TAMPA BAY, Tampa Bay, Florida, USA	4,410,000
20	LOTTE WORLD, Seoul, Korea ²	4,236,000
21	SEAWORLD CALIFORNIA, San Diego, California, USA	4,147,000
22	EUROPA-PARK, Rust, Germany	4,000,000
23	TIVOLI GARDENS, Copenhagen, Denmark	3,972,000
24	NAGASHIMA SPA LAND, Kuwana, Japan	3,734,000
25	KNOTT'S BERRY FARM, Buena Park, California, USA	3,565,000

¹ Everland attendance does not include Caribbean Bay water park visitation

² Lotte World attendance only includes theme park (adj. from previous year)-closed first half of 2007 (renovations) and re-opened July 1, 2007
Source: TEA and Economics Research Associates (ERA)

Top 15 U.S. Waterparks (2008)

Rank	Park and Location	2008 Attendance	% Change	Comments
1	TYPHOON LAGOON AT WALT DISNEY WORLD, Orlando, FL	2,059,000	-1.0%	Coming off strong previous year. Down slightly in light of declining economy, tourism and increased competition with opening of Aquatica.
2	BLIZZARD BEACH AT WALT DISNEY WORLD, Orlando, FL	1,891,000	-1.0%	Overall stable attendance at WDW resort helped to diffuse effects of weakening economy and Orlando tourist market.
3	WET 'N WILD, Orlando, FL	1,300,000	-5.1%	Negative impact on attendance as a result of Aquatica opening and declining tourism and economy in the last half of 2008.
4	AQUATICA, Orlando, FL	950,000	n.a.	Opened in March 2008 to positive response in Orlando market. Reached opening year target in first 6 months of operation.
5	SCHLITTERBAHN, New Braunfels, TX	882,000	2.0%	Attendance up in 2008 due to new Dragon's Revenge Water Coaster. Good waterpark weather almost all season. Park benefited from guests staying closer to home for vacation.
6	WATER COUNTRY USA, Williamsburg, VA	758,000	-1.9%	Balanced adverse effects of tourism decline with opening of Rock 'n' Roll Island/Jammin Jukebox slide tower (slides emptying into 9,000 sq.ft. pool surrounded by 700 ft. lazy river.).
7	ADVENTURE ISLAND, Tampa, FL	603,000	-2.0%	Drop in tourism to Central Florida due to poor economic conditions had negative impact on attendance.
8	SCHLITTERBAHN, Galveston, TX	558,000	1.5%	Attendance up slightly. Summer season cut short and Winter/Indoor season cancelled due to Hurricane Ike. Guests staying closer to home for vacation.
9 =	NOAH'S ARK, Wisconsin Dells, WI	533,000	-5.0%	Weak summer attendance during peak season. Major floods in the Dells during summer.
9 =	HYLAND HILLS WATER WORLD, Denver, CO	533,000	-4.5%	Slight attendance decline due to poorer summer weather conditions and a smaller boost from new attractions as compared to the prior year.
11	SPLISH-SPASH, Riverhead, New York	500,000	17.6%	Record attendance year. Strong performance despite weakening fourth quarter economy. Top performer among Palace Entertainment (Parques Reunidos) waterparks.
12	RAGING WATERS, San Dimas, CA *	490,000	-10.9%	Competitive market with multiple waterparks in the region. Economy and tourism had negative impact on attendance.
13	SIX FLAGS-WHITE WATER, Marietta, GA	481,000	2.6%	Successfully undertook water conservation efforts without shutting down any rides. Strong overall year.
14 =	DOLLYWOOD's SPLASH COUNTRY, Pigeon Forge, TN *	455,000	-5.0%	More rain than usual during early part of summer, which had an adverse effect on attendance during peak season.
14 =	SIX FLAGS-HURRICANE HARBOR, Arlington, TX	455,000	4.6%	Rolled back adult admission prices to \$24.99 for the 2008 Season. Opened new "Mega Wedgie" ride in 2008.

Note: "=" indicates a tie. Percent changes for 2008 for certain parks (noted by *) are based on adjusted/updated figures for 2007, thus not directly comparable to published TEA/ERA list for 2007/06

Source: TEA and Economics Research Associates (ERA)

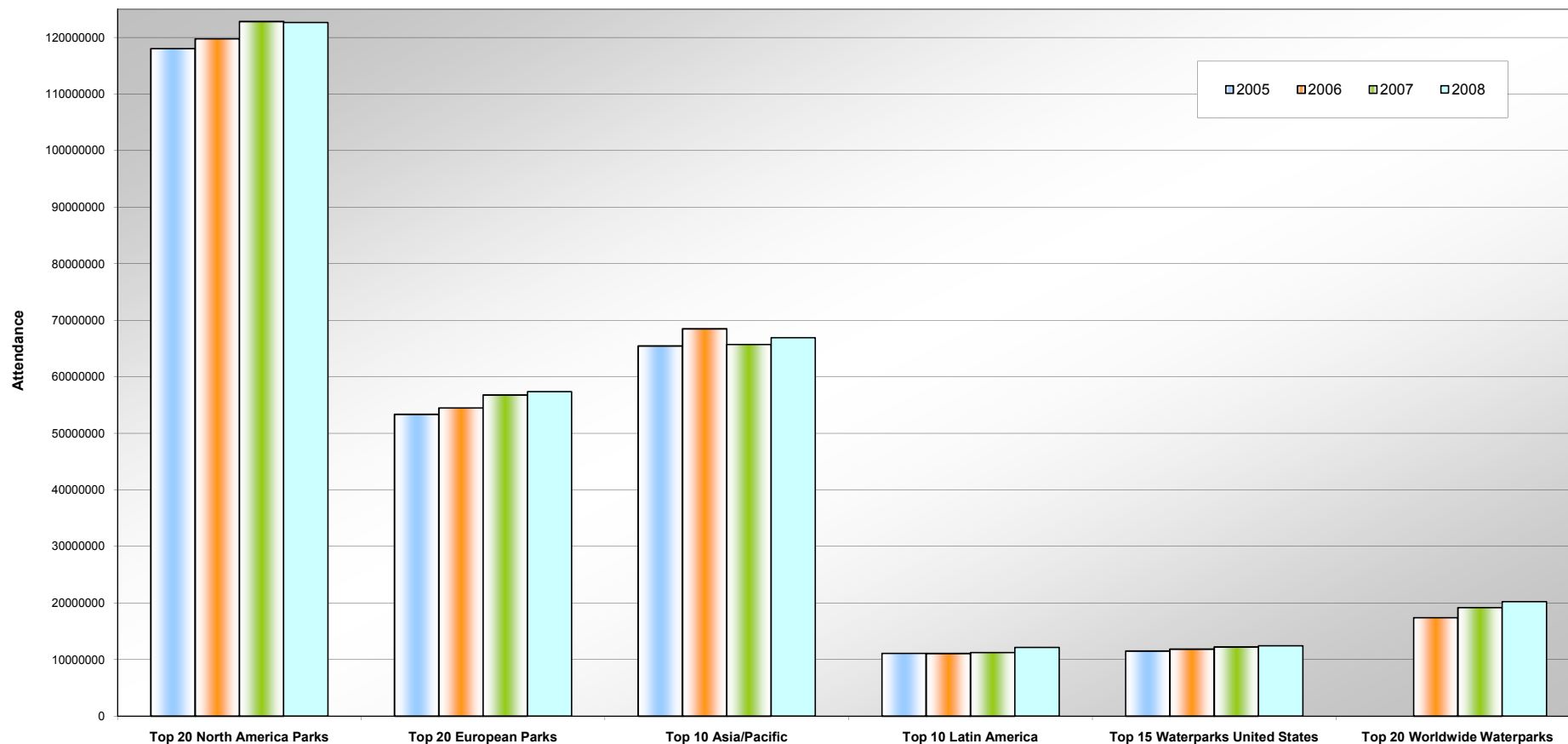
Top 20 Worldwide Waterparks (2008)

Rank	Park and Location	2008 Attendance	% Change
1	TYPHOON LAGOON AT DISNEY WORLD, Orlando, FL	2,059,000	-1.0%
2	BLIZZARD BEACH AT DISNEY WORLD, Orlando, FL	1,891,000	-1.0%
3	CHIMELONG WATER PARK, Guangzhou, China	1,600,000	14.3%
4	CARIBBEAN BAY AT EVERLAND RESORT, Gyeonggi-do, Korea	1,500,000	7.1%
5	WET 'N WILD, Orlando, FL	1,300,000	-5.1%
6	OCEAN WORLD, Gangwon-do, Korea	1,260,000	40.0%
7	SUNWAY LAGOON, Kuala Lumpur, Malaysia	1,100,000	21.0%
8	WET 'N WILD WATER WORLD, Gold Coast, Australia	1,025,000	Flat
9	AQUATICA, Orlando, FL	950,000	n.a.
10	SUMMERLAND, Tokyo, Japan	898,000	-2.5%
11	SCHLITTERBAHN, New Braunfels, TX	882,000	2.0%
12	WILD WADI, Dubai, U.A.E.	825,000	-2.4%
13	DEOKSAN SPA CASTLE, Chungcheong, Korea	800,000	Flat
14	WATER COUNTRY USA, Williamsburg, VA	758,000	-1.9%
15	SEORAK WATERPIA, Gangwon-do, Korea	670,000	Flat
16	ADVENTURE ISLAND, Tampa, FL	603,000	-2.0%
17	SCHLITTERBAHN, Galveston, TX	558,000	1.5%
18 =	NOAH'S ARK, Wisconsin Dells, WI	533,000	-5.0%
18 =	HYLAND HILLS WATER WORLD, Denver, CO	533,000	-4.5%
20	SPLISH-SPASH, Riverhead, New York	500,000	17.6%

Note: '=' indicates a tie.

Source: TEA and Economics Research Associates (ERA)

WORLDWIDE THEME PARK ATTENDANCE TRENDS -
TOP THEME PARKS AND WATERPARKS (2005-2008)



**Average Annual % Growth
(2005-2008)**

1.3%

2.5%

0.7%

3.1%

2.7%

7.8%

**Absolute % Change (2005-
2008)**

3.9%

7.6%

2.3%

9.7%

8.3%

16.3%

TEA/ERA Attraction Attendance Report for 2008 - Credits

Publisher: TEA (Themed Entertainment Association)

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About the numbers

ERA obtains the figures used to create this report through a variety of sources, including statistics furnished directly by the operators, historical numbers, financial reports, the investment banking community and local tourism organizations, among others. The global market is studied as a whole, and each of its four main regions are also studied separately: North America, Mexico/Latin America, Europe/Middle East and Asia/Pacific Rim. There is also a table of the top waterparks in the world and in the United States, and of the top global chain operators.

To be included in the study, a facility in general must be gated (entry ticket required). North American parks must have annual visits above one million. To be included on the top chains list, a chain operator must have theme parks in its portfolio. External and internal factors such as development, pricing, customer service, weather, demographics, investment/expansion, attendance and other dynamics that affect the estimated numbers are noted in comments within the charts.

About TEA

The [TEA](http://www.teaconnect.org) (Themed Entertainment Association) is an international nonprofit alliance founded in 1991 and based in Burbank, Calif. TEA represents some 7,000 creative specialists, from architects to designers, technical specialists to master planners, scenic fabricators to artists, and builders to feasibility analysts working in more than 600 firms in 33 US states and 40 different countries. TEA presents the annual Thea Awards and the TEA Summit and hosts the annual SATE conferences (Story, Architecture, Technology, Experience). TEA also produces a variety of print and electronic publications, including the TEA/ERA Attraction Attendance Report, TEA Project Development Guidelines, Thea Awards Program, TEA Market Sector Briefing: Architecture and Placemaking, and TEA Annual & Directory. Visit www.TEAconnect.org.

About ERA

[ERA](http://www.era.aecom.com) was founded as Economics Research Associates in Southern California in 1958. The firm's origins are in the commercial entertainment and attractions business. In the ensuing 50 years, ERA has built a diverse, global consulting business. The firm now has about 120 employees in 9 offices. We have completed nearly 18,000 assignments. In late 2007, ERA joined the AECOM family of companies. AECOM is a global leader in professional and management services involving all aspects of the built and natural environment. Its various operating companies generate over \$4 billion in annual revenues and employ more than 43,000 people around the world, dramatically expanding ERA's reach and service capability. ERA recently opened new offices in Hong Kong. Visit www.era.aecom.com.

About the Editor

Judith Rubin is a prominent editorial voice, since 1987 actively using the written word to promote the attractions community on behalf of trade associations, publications and creative companies. Visit www.judithrubin.blogspot.com.