

Amusement Parks 2017

Stagnant Attendance in the US

- According to Themed Entertainment Association (TEA), attendance at US theme parks increased by only 1.2% to 148 million. The market leader, Disney, had 1% fewer visitors at their parks, however revenue increased by 5% due to more spending per guest.
- The main winner domestically was Universal Studios with an increase of 7.4%, led by their Hollywood location which had a nearly 14% increase.
- In 2015, Disney dominated US theme park attendance with 9 of the top 10 spots. In 2016, their market share slipped, with Disney parks in only 6 of the top 10 spots.

Attendance at Top 10 Theme Parks, 2016

US Theme Parks	2016	2015	% Change
#1: Disney's Magic Kingdom	20.395 M	20.492 M	-0.5%
#2: Disneyland	17.943 M	18.278 M	-1.8%
#3: Epcot at Walt Disney World	11.712 M	11.798 M	-0.7%
#4: Disney's Animal Kingdom	10.844 M	10.922 M	-0.7%
#5: Disney's Hollywood Studios	10.776 M	10.828 M	-0.5%
#6: Universal Studios	9.998 M	9.585 M	+4.3%
#7: Universal's Islands of Adventure	9.362 M	8.792 M	+6.5%
#8: Disney's California Adventure	9.295 M	9.383 M	-0.9%
#9: Universal Studios Hollywood	8.086 M	7.097 M	+13.9%
#10: Seaworld Florida	4.402 M	4.777 M	+7.9%

Themed Entertainment Association/AECOM, 2016 Themed Index Report

Ratcheting Up the Fun

- TEA ascribes Disney's lower attendance numbers to the company's concentration of resources in their Asian parks, along with competition from Universal's Harry Potter attractions in both Hollywood and Orlando.
- For 2017, they forecast more Disney attendees due to the opening of the Pandora land based on the movie *Avatar* at Disney's Animal Kingdom. Universal is expected to increase attendance from its new Volcano Bay water park, opened May 2017.
- According to *Theme Park Tourist*, the percentage of international visitors has decreased, while the percentage of local visitors has increased, leading to 2016's lack of significant growth in attendance.

Repeat Visits to Theme Parks

Visitor behavior & attitudes	%
Travelled 50 miles or more from home	52%
Used a theme park season pass	23%
Said they had visited this park before	74%
Likely to recommend park to others	52%

2017 Voice of the Visitor

Dampening Attendance at Waterparks

- In North America, water park revenue decreased by 0.7%, although Six Flags Whitewater and Hurricane Harbor showed increases of 5.0% and 2%, respectively.
- Attendance at Disney’s Typhoon Lagoon and Blizzard Beach each dropped by a little less than 1%, and SeaWorld’s Aquatica attendance decreased by 4%.
- On a 5-point scale, water parks scored an average of 4.05 when visitors were asked how likely it was for them to return to the same park in 2017. Based on this survey, water park attendance is forecasted to decrease by 0.7% in 2017.

Top 10 North American Water Parks, 2014

Park	2016	2015	% Change
Typhoon Lagoon at Disney World, Orlando, FL	2.28 million	2.29 million	-0.7%
Blizzard Beach at Disney World, Orlando, FL	2.09 million	2.11 million	-0.8%
Aquatica, Orlando, FL	1.54 million	1.60 million	-4.0%
Wet `N` Wild, Orlando, FL	1.31 million	1.31 million	0.0%
Schlitterbahn, New Braunfels, TX	1.04 million	1.04 million	0.0%
Water Country USA, Williamsburg, VA	733,000	726,000	+1.0%
Adventure Island, Tampa, FL	650,000	663,000	-2.0%
Six Flags White Water, Marietta, GA	568,000	541,000	+5.0%
Schlitterbahn, Galveston, TX	562,000	551,000	+2.0%
Six Flags-Hurricane Harbor, Arlington, TX	549,000	549,000	0.0%

Themed Entertainment Association/AECOM, 2017 Themed Index Report

Changing Face of Water and Theme Park Visitors

- Slightly more than half (52%) of visitors traveled more than 50 miles to visit a theme park, a decrease of 9% from 2015.
- The largest demographic age group represented among visitors is the millennials, at 56% of water park visitors and 50% of theme park visitors, followed by Gen X at 27% of both water park and theme park guests.
- Perhaps due to rising theme park ticket prices, the average income of theme park and water park guests has risen to \$86K for both theme and water park guests. The average income in the US is \$55,775.

Key Demographics of Theme and Water Park Attendees, 2016

Characteristic	Theme parks	Water parks
Average age	41	38
Families	41%	56%
Have season pass	23%	26%
Have college degree	60%	57%

Voice of the Visitor, 2017

Look for These Theme Park Trends

- Theme parks will increasingly use RFID technology, as Disney is already doing with its Magic Bands. The big data from these devices will enable parks to more efficiently maximize revenue, analyze guest activity and preferences and reward pass holders.
- Parks will be offering more premium experiences to guests for an upcharge. Current upcharge experiences include \$700 tents at Tomorrowland and VIP spots for parade viewing.
- Parks will be hosting more limited-time special events. At Epcot, for example, more than half of 2017 will be taken up by special events like the Epcot International Festival of the Arts and the Epcot International Food and Wine Festival.
- Technology including mobile devices and kiosks will help minimize lines by allowing patrons to schedule their rides.
- Attractions will be more continuous and multi-sensory to provide more guest engagement and make the parks more memorable.
- Rides will involve more choices and be more thrilling and scary, and not just on Halloween. Industry experts say this will appeal more to adults, especially millennials and will encourage repeat rides.
- Food at parks will be higher quality, healthier and more creative. Food will be integrated into the overall experience of the attractions rather than something consumed between rides.

Additional Analysis

According to Travel & Leisure magazine, these are the fastest, scariest and overall best theme park rides opening in 2017 and will be major drivers of visitors this year.

Best New Theme and Water Park Rides in 2017

Ride	Theme park	Location
Pandora: World of Avatar	Disney's Animal Kingdom	Orlando, FL
Wave Breaker	SeaWorld	San Antonio, TX
The Ocean Explorer	SeaWorld	San Diego, CA
Race Through New York with Jimmy Fallon	Universal Studios	Orlando, FL
Joker 4D Coaster	Six Flags	Texas, New England, Great America
Kraken Virtual Reality	SeaWorld	Orlando, FL
Ninjago World	Legoland	Orlando, FL
Guard. of the Galaxy:Mission Breakout	Disney California Adventure	Anaheim, CA

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