

EAS
2008

Euro Attractions Show

Ode to Joy:
The State of the
European Attractions Industry

Euro Attractions Show

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Munich, Germany

Presentation material is also available at: www.iaapa.org

Ode to Joy



The State of the European Industry

Roland Mack, Europa Park

Richard Golding, Parques Reunidos

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Economics Research Associates

Leading European Parks



Top 20 Amusement/Theme Parks - Europe (2007)



Rank	Park and Location	2007 Attendance	% Change
1	DISNEYLAND PARIS, Marne-La-Vallée, France	12,000,000	13.1%
2	PLEASURE BEACH, Blackpool, UK	5,500,000	-8.3%
3	TIVOLI GARDENS, Copenhagen, Denmark [†]	4,110,000	-6.5%
4	EUROPA PARK, Rust, Germany	4,000,000	1.3%
5	PORT AVENTURA, Salou, Spain [†]	3,700,000	5.7%
6	DE EFTELING, Kaatsheuvel, Netherlands	3,200,000	0.0%
7	GARDALAND, Castelnuovo del Garda, Italy	3,100,000	0.0%
8	LISEBERG, Gothenburg, Sweden [†]	3,050,000	3.4%
9	BAKKEN, Copenhagen, Denmark	2,700,000	0.0%
10	WALT DISNEY STUDIOS, Marne-La-Vallée, France	2,500,000	13.6%
11	ALTON TOWERS, Staffordshire, UK	2,400,000	0.0%
12	PHANTASIALAND, Brühl, Germany	1,900,000	0.0%
13	THORPE PARK, Surrey, UK	1,700,000	0.0%
14	MIRABILANDIA, Salsò, Italy	1,700,000	0.0%
15	LEGOLAND WINDSOR, Windsor, UK	1,650,000	11.5%
16	PARC ASTERIX, Platy, France	1,620,000	-4.7%
17	LEGOLAND BILLUND, Billund, Denmark	1,610,000	10.3%
18	FUTUROSCOPE, Pullen, France	1,600,000	6.7%
19	PARQUE DE ATRACCIONES, Madrid, Spain	1,500,000	0.0%
20	HEIDE PARK, Sottau, Germany	1,400,000	16.7%



Economics Research Associates

Roland Mack



Consolidation is the name of the game. There are now three big groups in Europe.
Are there still deals to be had or is the fruit all gone?
Are expectations of prices too high?
How do buyers assess opportunities?

Leading Operating Groups



Top 10 Amusement/Theme Park Attraction Chains - World (2007)



Rank	Theme Park Attraction Chain	2007 Attendance (millions)
1	WALT DISNEY ATTRACTIONS	116.5
2	MERLIN ENTERTAINMENT GROUP	32.1
3	UNIVERSAL STUDIOS RECREATION GROUP	26.4
4	SIX FLAGS INC.	24.9
5	BUSCH ENTERTAINMENT	22.3
6	CEDAR FAIR ENTERTAINMENT COMPANY	22.1
7	PARQUES REUNIDOS	12.0
8	COMPAGNIE DES ALPES (GREVIN)	9.6
9	HERSCHEM FAMILY ENTERTAINMENT	8.9
10	EVERLAND	8.6

Source: TEA and Economics Research Associates (ERA)



Economics Research Associates

Richard Golding



PARQUES REUNIDOS

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How do you improve an attraction you have taken over?

What are the 2 or 3 key operational changes that often enhance performance?

How do you enhance operations that you currently have?

What are some of the best examples of improvements that you have seen?

2008 - How Has it Been?



With few parks available to buy is the time ready for new developments or are they just too expensive to build?

Are we just going to see roll-outs of smaller-budget offerings in the future?

Is there potential for new build theme parks in Europe?

The Financial Crisis



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Does a brand make a project?

Can a brand detract from a project?

What is the impact that a brand can have on a scheme?

Are we becoming over-reliant on brands?

How can we create a brand?

Is the Middle East in danger of being over-branded?

Deal or No Deal?



Anheuser-Busch (BUD): Let The Theme Park Sale Begin (BUD)
Corey Lotnisky | Jul 15, 08 8:57 AM

Now that Belgian brewer InBev has agreed to buy Anheuser-Busch (BUD), it will soon be stuck with a whole lot of debt. So what will a savvy company like InBev do? Have a fire sale for all the low-growth components of BUD. The likely candidates for sale are:

- the theme-park division (good riddance)

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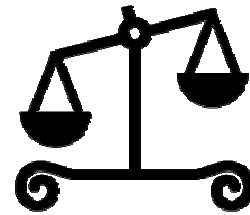
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Price v Volume



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- How do you retain customers amid so much competition for their time?
- How do you know what your customers are thinking and doing?
- What research and communications tools do you find most effective?
- How useful are CRM systems in an occasional purchase offering?

New Markets



How do you measure your performance?

What are the KPI's that you examine on a daily, weekly & monthly basis and how is this data gathered?

Is it useful to compare across a group or more valuable to compare sites over time?

Future Developments



How do you decide on what to add to your attractions?

Do you research customers on their wants & needs, if so how?

Do you target new attractions at specific segments of your market?

How do you monitor if the attraction has worked?

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