

2009

THEME

INDEX

THE GLOBAL ATTRACTIONS
ATTENDANCE REPORT



REPRESENTING
CREATORS OF
COMPELLING
PLACES & EXPERIENCES

AECOM

Economics

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GLOBAL TRENDS

IN A CHALLENGING YEAR, RESILIENCE AND REPOSITIONING

JUDITH RUBIN TEA PUBLICATIONS EDITOR

2009 saw a second consecutive year of global economic turmoil adversely impacting attendance in the themed attraction industry. Nevertheless, despite the challenges presented by the reduced consumer spending and budgets, attraction operators managed to weather the storm at a level equal or ahead of many other industries.

“The international theme park and attractions industry is coming off a challenging year due to the global economic recession,” said Themed Entertainment Association (TEA) president Steve Thorburn of Thorburn Associates, in spring 2010. “The figures within the 2009 TEA/AECOM Attraction Attendance Report reflect that. But they also reflect the resilience and creativity of the industry and show us the way to future growth. Under the circumstances, in 2009 the major parks did remarkably well. TEA and AECOM join forces each year to create this report for the benefit of the industry.”

In 2009, most of the top theme parks and leisure destinations saw either flat attendance or a decline. This was due in large part to reduced spending and travel by consumers reacting to the recession, along with the effects of the H1N1 flu virus. “Most parks felt the impact of the deepest recession since the Great Depression,” said Ray Braun, Senior Vice President, AECOM and head of its Entertainment and Recreation Economics operation. The strategies parks employed to sustain numbers and make the best of a troubled situation underscore the basic fundamentals of good business in the visitor attractions industry: reinvestment in the guest experience, creative targeted marketing and building the relationship with the customer.



REPOSITIONING FOR THE REGIONAL

Destination parks rely on a combination of tourists and locals, but in 2009 had fewer of the former coming through the turnstiles: total visitation to Orlando in 2009, for instance, was down 9 percent. Destination parks endeavoured to maintain their attendance totals at healthy levels via strategies that put more emphasis on building relationships with customers and less on revenue, offsetting the lower levels of tourism by encouraging regional attendance and repeat visits through special programs, passes and discounts.

While destination parks are adversely impacted by an economic downturn as discretionary spending declines, lower cost regional parks and attractions tend to benefit from those same trends, as consumers shift to the less expensive entertainment option. Other regional attractions such as museums and zoos tend to fare better as well during tighter economic periods.

In 2009, the top-25 global parks attracted slightly below the 186 million visits in 2008. North American parks experienced a slight decline of just over 1 percent, buoyed in large part by the strong performance of the Disney parks. In light of the overall US economy's decline of 2.5 percent based on Real GDP Growth, the theme park industry fared quite well. In Europe and Asia, parks were slightly down, while Mexico and Latin America overall experienced an increase.

AROUND THE WORLD, BETTER TIMES AHEAD

Taken together, the numbers this year reflect an industry that is stable at its core and well equipped to survive, recover and continue its expansion into new markets as the world economy recovers. Surveying the globe, North America remains the epicenter of the amusement business with 12 of the top-25 attended parks in the world. Shifting east, although affected by the global downturn, Asia continues to be the foremost emerging market and promises strong growth well into the future. "China and key markets in Asia have a significant development pipeline compared to anywhere else in the world. The opening of Universal Studios Singapore in the first quarter of 2010 marked the beginning of the new decade where Asia will dominate and remain the primary region for future growth of the industry in terms of new development potential," said Christian Aaen, Regional Director of AECOM's Economics practice in Asia.

Once-high expectations for Dubai and the UAE have been curtailed, for the time being at least. "Ferrari World in Abu Dhabi is on track to open in 2010 but that seems destined to be the flag bearer for the region for the next few years until the economic situation stabilises," said David Camp, Director of AECOM's Economics practice. In Europe, regional parks maintained attendance with some exceptions. "Overall, 2009 was another good year for Europe's theme parks," reported Lesley Morisetti, Director of AECOM's Economics practice. Despite challenges, "there were signs of growth and development in the Mexico/Latin America region, especially in Brazil," said Edward Shaw, Senior Associate with AECOM's Economics practice.

This year's attendance numbers show that parks are weathering the recession and positioning themselves for the recovery. "We expect next year to show stronger figures with continued economic recovery and pent-up demand," says John Robinett, Senior Vice President of AECOM's Economics practice.

185.6 million

Total theme park attendance for top 25 worldwide parks, a **decline of 0.2 percent** from 2008.

121.4 million

Total visits to the top 20 parks in North America, a **decline of 1.1 percent** from 2008.
Since 2005, attendance to the top 20 parks in North America has grown by 2.8 percent.

57.3 million

Attendance for the top 20 European parks, **level** with 2008 numbers.
Total attendance for top 20 parks has grown by 7.3 percent since 2005.

65.5 million

Total visits to the top 10 Asian parks **down 3.5 percent** from 2008.
For the new top 15 Asian parks, total attendance was 77.6 million in 2009, a decline of 2.9 percent compared to 2008.

12.3 million

Attendance to top 10 parks in Mexico and Latin America **up 1.3 percent** from 2008.

20.7 million

Top 20 worldwide waterparks attendance in 2009 –
an **increase of 2.1 percent** from 2008.

12.8 million

Total visitation to top 15 waterparks in US,
a **growth of 3.0 percent** from 2008 and 11.6 percent from 2005.

REGIONAL OBSERVATIONS: AECOM PRINCIPALS WEIGH IN

NORTH AMERICA

“Most parks felt the impact of the deepest recession since the Great Depression. The notable exception was the biggest operator, Disney, which held its own in Florida and was up significantly in California. Disney successfully marketed special programs to its resident market base at substantial discounts.”

Ray Braun,
Senior Vice President, AECOM Economics

“The brunt of the North American recession was felt in this year’s numbers. The two major markets, Los Angeles and Orlando, suffered from weak tourism and both saw single and sometimes double digit declines in their major parks – the exception being Disney which countered the trend through aggressive discounting and marketing. We expect next year to show stronger figures with continued economic recovery and pent-up demand.”

John Robinett,
Senior Vice President, AECOM Economics

EUROPE

“With consumers around the world cutting back, a number of European countries have seen increases in domestic tourism, or “staycations” at the expense of overseas trips. This has benefited many of the large regional parks, particularly in the UK and Germany, but has proven challenging for some destination parks. Some of the more tourist-oriented parks such as Port Aventura suffered as holiday makers tightened their belts, and Tivoli was hit by the Climate Conference taking place in Copenhagen during its Christmas season, but overall 2009 was another good year for Europe’s theme parks.”

Lesley Morisetti,
Director, AECOM Economics

MIDDLE EAST

“And what of the much-hyped Middle East theme park market? The multitude of grand plans for Dubai and other parts of the region have fallen foul of the global recession and Dubai’s over-exuberance. Ferrari World

in Abu Dhabi is on track to open in 2010 but that seems destined to be the flag bearer for the region for the next few years until the economic situation stabilises.”

David Camp,
Director, AECOM Economics

MEXICO/LATIN AMERICA

“Attractions throughout Latin America and Mexico were adversely impacted by the recession and the outbreak of the H1N1 virus – particularly in Mexico. However, despite those challenges, there were signs of growth and development in the region, especially in Brazil. Revenues and profit margins tightened throughout Mexico and Latin America as discounting and promotional programs were aggressively implemented in order to maintain attendance.”

Edward Shaw,
Senior Associate, AECOM Economics

WATERPARKS

“Similar to the rest of the global attractions market, waterparks in the U.S. employed significant customer loyalty programs in 2009 in order to maintain visitation from 2008. Parks such as Schlitterbahn in New Braunfels, Texas, and Adventure Island in Tampa, Florida, showed growth in attendance. The two Disney waterparks in Orlando also maintained their numbers from 2008 by offering resident-targeted packages and options.”

Edward Shaw,
Senior Associate, AECOM Economics

“As expected, most of the major waterparks in Asia were impacted by H1N1 flu and the worldwide financial crisis, with several parks experiencing significant drops in attendance. Despite the challenging operating environment, key parks including Chimelong Water Park (China), Wet ‘N Wild Water World (Australia) and Ocean World (South Korea) managed to grow attendance between 4 and 12.5 percent. In particular, Chimelong Water Park continued its strong performance as the most attended waterpark in Asia with effective marketing to local and regional market, promotions

and an increase in events/shows. Management of most waterparks maintain a positive outlook for 2010 as the economy recovers and new attractions will be added”

Janice Li,
Senior Associate, AECOM Economics

ASIA

“Parks in Asia also felt the impact of the global recession with attendance declines at many major parks.”

Ray Braun,
Senior Vice President, AECOM Economics

“Most operators in Asia were cautiously optimistic for the 2009 season, and that caution was justified. The season turned out to be challenging due to the global financial crisis, outbreak of H1N1 and poor weather conditions in some markets in Asia.”

Christian Aaen,
Regional Director, AECOM Economics

“Still, new parks opened in China and key markets in Asia have a significant development pipeline compared to anywhere else in the world. The opening of Universal Studios Singapore in the first quarter of 2010 marked the beginning of the new decade where Asia will dominate and remain the primary region for future growth of the industry in terms of new development potential.”

Christian Aaen,
Regional Director, AECOM Economics

“With key fundamentals in place such as the growing middle class and incomes in Asia, as well as demand for entertainment and leisure time, this is the perfect product for tourism and economic development. We expect Asia to fast track the growth curve and theme park product development lifecycle in this new decade with increasing visits per capita and worldwide market share.”

Christian Aaen,
Regional Director, AECOM Economics

SPOTLIGHT: ASIA

CHRISTIAN AEN
REGIONAL DIRECTOR (ASIA), AECOM ECONOMICS

As noted in the 2008 TEA/ERA Attraction Attendance Report most operators in Asia were cautiously optimistic for 2009. The 2009 season turned out to be a challenging year for most markets in Asia, from Japan to Korea and China. Ten out of the top 15 parks in Asia were down, ranging from less than one percent to almost 12 percent decline.

CHINA: DRIVING GROWTH

The industry is moving to Asia. At AECOM, we really view Asia and in particular China as the major growth region now and in the future. Overall the total attendance for the Asian Top 15 for 2009 was 77.6 million, down from just under 80 million in 2008. The Asian market fell by an average 2.9 to 3.5 percent in 2009 among the top 10-15 theme parks, due to the global financial slowdown and recession, outbreak of H1N1 and poor weather conditions in some markets. However, a number of new parks are planned in the region and so the expectation is that Asia will rebound quickly and continue as the main growth engine for the industry led by China.

Among the Asian countries, China presents the greatest opportunities for emerging middle class products such as theme parks and attractions. Beijing and Shanghai in particular as well as Southern China represent key strategic markets for future branded destination theme park development based on the scale of the resident and tourist markets. We believe China over time can support multiple theme park destination developments.

GROWTH HOT SPOTS

There are a number of growth “hot spots” in the region: Tianjin, Chengdu and Southern China



OCEAN PARK, HONG KONG

(Guangzhou/Shenzhen) in addition to Beijing and Shanghai. After more than a decade of talks and negotiations, Shanghai has finally secured the Mainland’s first Disneyland with expected opening in 2014/15. On top of that, Shanghai is hosting what is likely to be the largest world’s fair in history: Expo 2010 Shanghai will open in May 2010 with an expected 70+ million visitors over the six months of operations.

Universal is looking at several cities as possible park sites in China and Asia as well as other international operators including LEGOLAND, Village Roadshow and more.

Shenzhen, Guangzhou, Macau and Hong Kong are

poised for growth, as well as Chengdu, “Gateway to the Panda,” and in particular Hainan Island, a top vacation destination that has a tropical feel, something like a combination of Hawaii and central Florida, with potential for multiple major attractions as a destination resort market. In Hainan, AECOM is currently working on a project for China Aerospace - a unique, space theme park attraction and future tourism development - scheduled to open in 2013 or 2014.

Macau is a special case due to its many casinos. Developers in Macau have been expanding aggressively during the past five years, working to add other kinds of leisure and culture attractions to diversify the mix of offerings.

Ocean Park, a well-established amusement park in Hong Kong, is in the process of implementing a US\$712 million redevelopment master plan, expected to be completed by 2012. This will enlarge the park by 12-15 acres and double the number of attractions and rides.

The OCT Holding, developer of the Happy Valley regional theme parks in China, plans to expand the brand with other projects. OCT is one of the most active and experienced developers in China, with parks in Beijing, Shanghai and Chengdu. OCT is looking at expansion in second-tier cities in China, such as Wuhan. OCT is also opening new tourism products such as OCT East Resort in Shenzhen.

Guangzhou is home to Chimelong Group, a trio of successful safari, amusement and water parks, including the highest attended water park in China - a true destination resort with a 1,200-room hotel and convention and meeting facilities, themed but not quite to the extent of properties in Orlando. The Chimelong Group is also currently looking at developing "Zhuhai Ocean World" destination theme park in Hengqin Island just opposite Macau.

MORE ASIAN MARKETS: REGIONAL SNAPSHOTS

Singapore

The island nation is a hot spot because of the newly developed Integrated Resorts. Examples are Marina Bay and Sands Resort (MBS), as well as Genting's Resorts World on Sentosa Island (RWS). The Universal Studios theme park just had its soft opening in March 2010, and will have phased opening of a new Maritime Museum, and a unique "aquatic immersive attraction." Those projects will be a major boost to Singapore. They will broaden the market, bring in families, and boost tourism arrivals significantly.

Malaysia

The Southern Malaysian - Iskandar Region is almost three times the size of Singapore. The Legoland Malaysia Resort is scheduled for a late 2012 opening, with a hotel and adjacent large-scale mixed-use project including a shopping center. The companies behind that development are Iskandar Investments and Khazanah Nasional (via its Themed Attractions and Resorts) - two key driving forces in the fast developing Malaysian tourism industry. In Kuala Lumpur, there are several projects in early planning, related to cultural tourism with very interesting potential. This also includes Malaysia's first KidZania attraction in 2012.

South Korea

Several major internationally branded theme park projects have been proposed and are currently under consideration in and around the Seoul capital region, including Universal Studios Korea. KidZania is continuing its expansion in Asia and recently opened at Lotte World in February 2010.

Japan

HIT Entertainments recently opened its first prototype indoor children's attraction at a regional mall in a suburb of Tokyo. Earlier in the year, KidZania opened its second location in Koshien (Osaka) which is performing very strongly. There is very strong potential in the branded indoor

children's attraction market in Asia, and several consumer brand and entertainment firms are currently looking actively at this market.

Indochina

Vietnam has been growing quite fast, with a focus on Hanoi and Ho Chi Minh City as well as selected coastal areas for resort development and golf. The focus is on mixed-use, because income is more moderate than other parts of the region, but it will catch up with other areas over time.

India

In the short to medium term, India is more focused on retail development and indoor attractions. Major themed attractions and destinations may come along eventually, as infrastructure and income levels increase, but at this stage India significantly trails China.

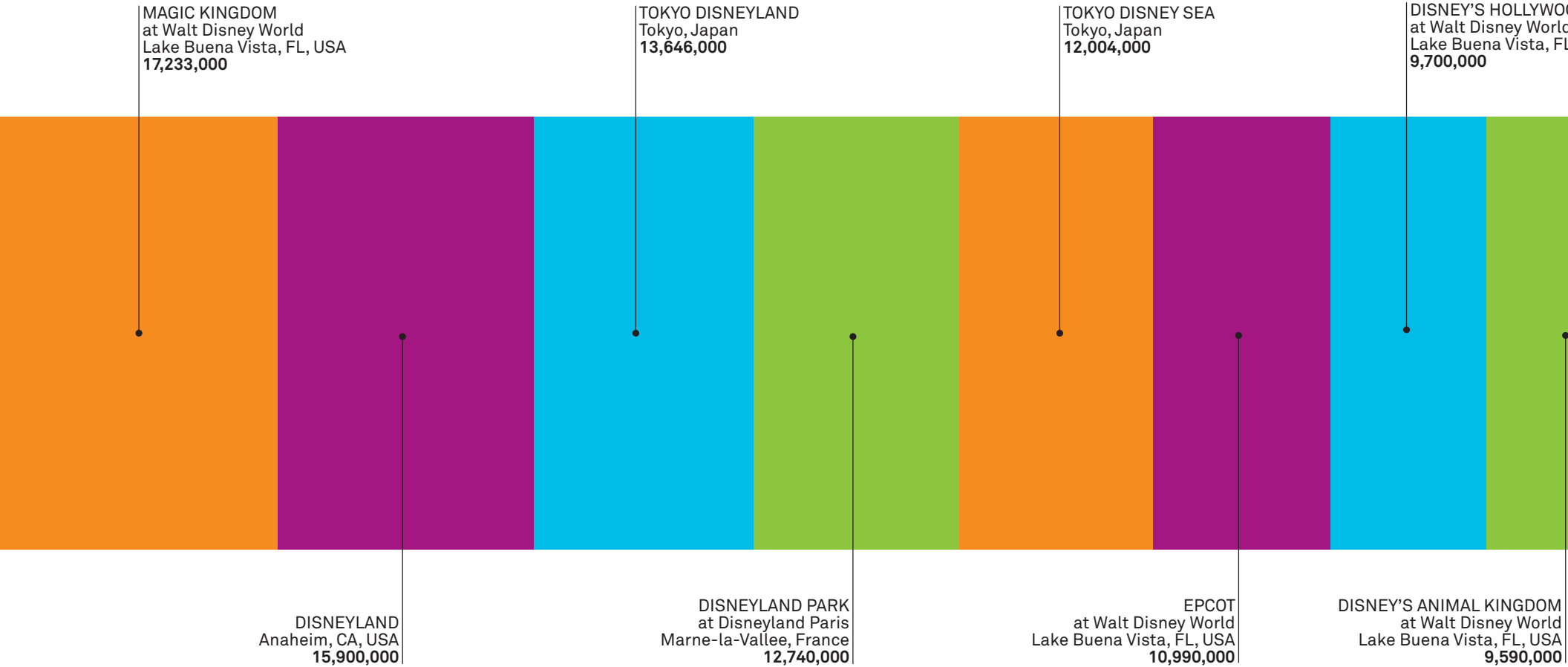
Thailand

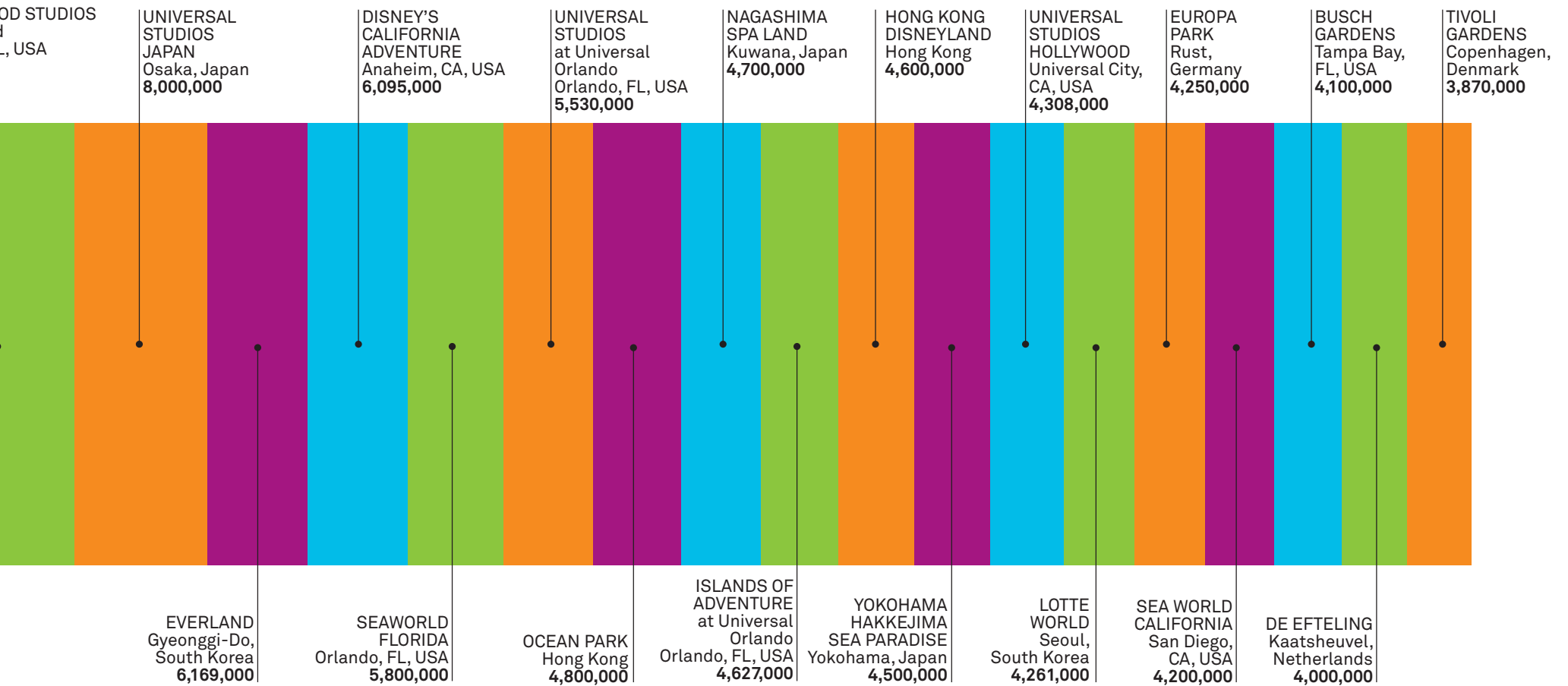
New developments are currently in the pipeline for Bangkok including a Madame Tussauds attraction as part of the Siam Paragon Group's shopping complex in central Bangkok as well as a new KidZania attraction. The rest of Thailand is more on the resort side. Thailand has been up and down, based on the geo-political environment, but is coming back and attracting developers and investors.

GLOBAL NUMBERS

Attraction operators continued to weather the economic storm at a level equal or ahead of many industries in 2009. The top 25 global parks attracted slightly below the 186 million visits in 2008.

TOP 25 THEME PARKS





TOP 25 THEME PARKS

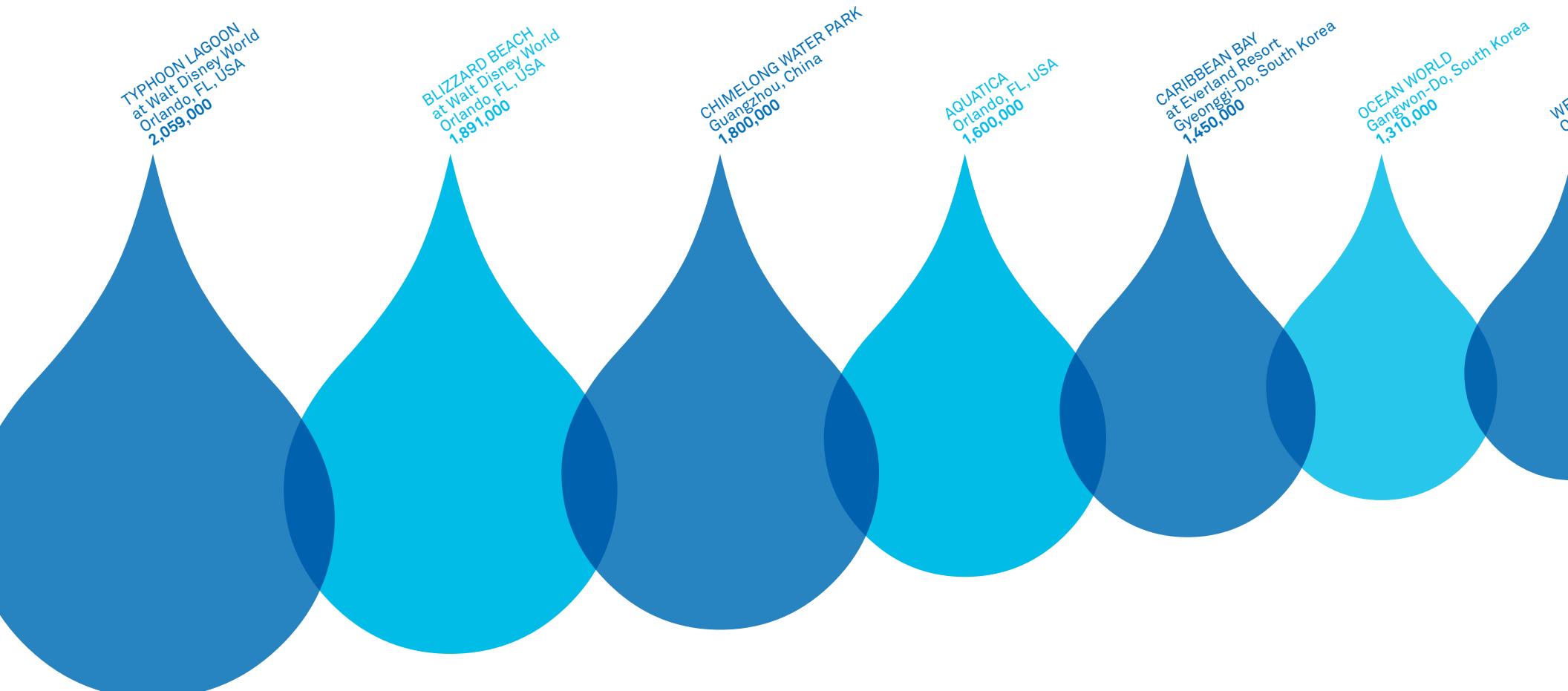
1	MAGIC KINGDOM at Walt Disney World Lake Buena Vista, FL, USA	17,233,000	visitors	↑ 1.0%
2	DISNEYLAND Anaheim, CA, USA	15,900,000	visitors	↑ 8.0%
3	TOKYO DISNEYLAND Tokyo, Japan	13,646,000	visitors	↓ 4.5%
4	DISNEYLAND PARK at Disneyland Paris Marne-la-Vallee, France	12,740,000	visitors	↑ 0.4%
5	TOKYO DISNEY SEA Tokyo, Japan	12,004,000	visitors	↓ 4.0%
6	EPCOT at Walt Disney World Lake Buena Vista, FL, USA	10,990,000	visitors	↑ 0.5%
7	DISNEY'S HOLLYWOOD STUDIOS at Walt Disney World Lake Buena Vista, FL, USA	9,700,000	visitors	↑ 1.0%
8	DISNEY'S ANIMAL KINGDOM at Walt Disney World Lake Buena Vista, FL, USA	9,590,000	visitors	↑ 0.5%
9	UNIVERSAL STUDIOS JAPAN Osaka, Japan	8,000,000	visitors	↓ 3.6%
10	EVERLAND Gyeonggi-Do, South Korea	6,169,000	visitors	↓ 6.5%
11	DISNEY'S CALIFORNIA ADVENTURE Anaheim, CA, USA	6,050,000	visitors	↑ 9.5%
12	SEAWORLD FLORIDA Orlando, FL, USA	5,800,000	visitors	↓ 6.8%
13	UNIVERSAL STUDIOS at Universal Orlando Orlando, FL, USA	5,530,000	visitors	↓ 10.0%

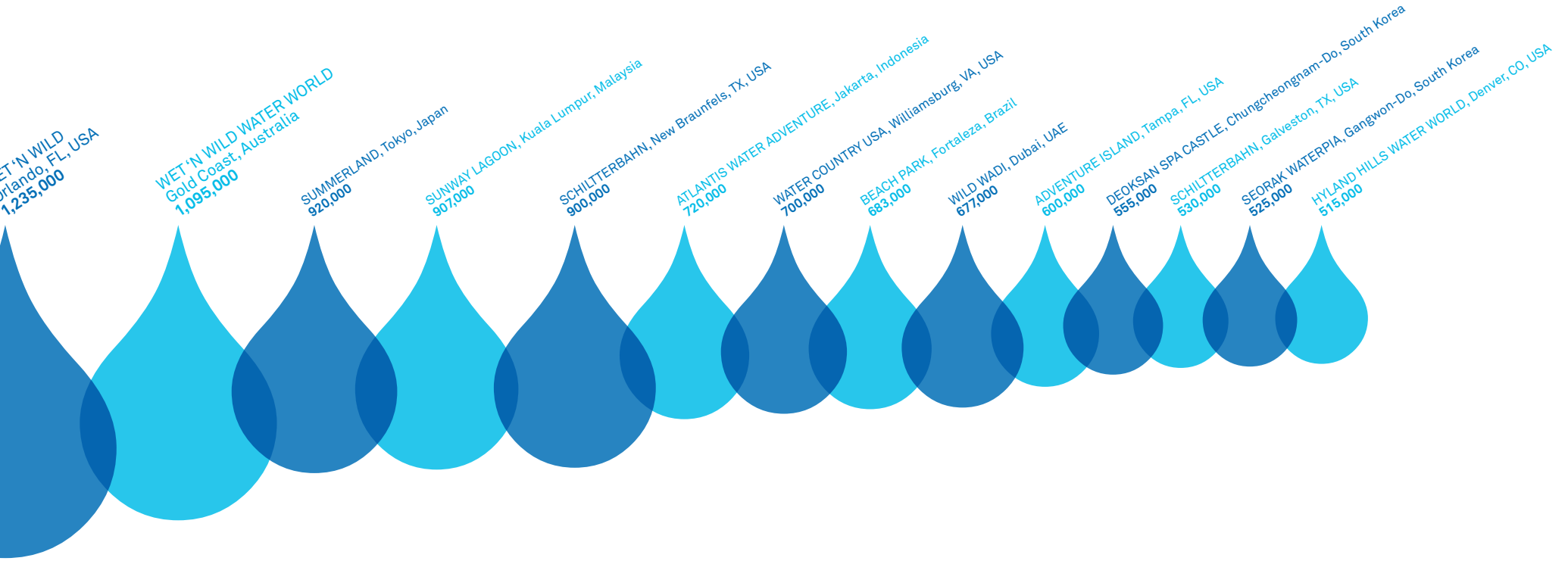
14	OCEAN PARK Hong Kong	4,800,000	visitors	↓ 4.6%
15	NAGASHIMA SPA LAND Kuwana, Japan	4,700,000	visitors	↑ 1.1%
16	ISLANDS OF ADVENTURE at Universal Orlando Orlando, FL, USA	4,627,000	visitors	↓ 11.3%
17	HONG KONG DISNEYLAND Hong Kong	4,600,000	visitors	↑ 2.0%
18	YOKOHAMA HAKKEIJIMA SPA PARADISE Yokohama, Japan	4,500,000	visitors	↓ 0.7%
19	UNIVERSAL STUDIOS HOLLYWOOD Universal City, CA, USA	4,308,000	visitors	↓ 6.0%
20	LOTTE WORLD Seoul, South Korea	4,261,000	visitors	↑ 0.6%
21	EUROPA PARK Rust, Germany	4,250,000	visitors	↑ 6.3%
22	SEAWORLD CALIFORNIA San Diego, CA, USA	4,200,000	visitors	↓ 12.6%
23	BUSCH GARDENS TAMPA BAY Tampa Bay, FL, USA	4,100,000	visitors	↓ 12.3%
24	DE EFTELING Kaatsheuvel, Netherlands	4,000,000	visitors	↑ 25.0%
25	TIVOLI GARDENS Copenhagen, Denmark	3,870,000	visitors	↓ 2.6%

Note: Attendance figures are estimates, based on company information, annual reports, published information and from reliable TEA/AECOM industry and tourism sources. Percent changes for 2009 for certain parks are based on adjusted/updated figures for 2008, thus not directly comparable to published TEA/AECOM list for 2008/07.

Source: TEA / AECOM

TOP 20 WATERPARKS





TOP 20 WATERPARKS

1	TYPHOON LAGOON at Walt Disney World Orlando, FL, USA	2,059,000 visitors	↔ 0%
2	BLIZZARD BEACH at Walt Disney World Orlando, FL, USA	1,891,000 visitors	↔ 0%
3	CHIMELONG WATER PARK Guangzhou, China	1,800,000 visitors	↑ 12.5%
4	AQUATICA Orlando, FL, USA	1,600,000 visitors	↓ 6.8%
5	CARIBBEAN BAY at Everland Resort Gyeonggi-Do, South Korea	1,450,000 visitors	↓ 3.3%
6	OCEAN WORLD Gangwon-Do, South Korea	1,310,000 visitors	↑ 4.0%
7	WET 'N WILD Orlando, FL, USA	1,235,000 visitors	↓ 5.0%
8	WET 'N WILD WATER WORLD Gold Coast, Australia	1,095,000 visitors	↑ 6.8%
9	SUMMERLAND Tokyo, Japan	920,000 visitors	↑ 1.9%
10	SUNWAY LAGOON Kuala Lumpur, Malaysia	907,000 visitors	↓ 17.5%
11	SCHLITTERBAHN New Braunfels, TX, USA	900,000 visitors	↑ 2.0%
12	ATLANTIS WATER ADVENTURE (Taman Impian Jaya Ancol) Jakarta, Indonesia	720,000 visitors	↓ 10.0%
13	WATER COUNTRY USA Williamsburg, VA, USA	700,000 visitors	↓ 2.2%

14	BEACH PARK Fortaleza, Brazil	683,000	visitors	↑	29.4%
15	WILD WADI Dubai, UAE	677,000	visitors	↓	17.9%
16	ADVENTURE ISLAND Tampa, FL, USA	600,000	visitors	↑	9.3%
17	DEOKSAN SPA CASTLE Chungcheongnam-Do, South Korea	555,000	visitors	↓	7.5%
18	SCHLITTERBAHN Galveston, TX, USA	530,000	visitors	↓	5.0%
19	SEORAK WATERPIA Gangwon-Do, South Korea	525,000	visitors	↓	16.0%
20	HYLAND HILLS WATER WORLD Denver, CO, USA	515,000	visitors	↓	3.4%

Note: Attendance figures are estimates, based on company information, annual reports, published information and from reliable TEA/AECOM industry and tourism sources. Percent changes for 2009 for certain parks are based on adjusted/updated figures for 2008, thus not directly comparable to published TEA/AECOM list for 2008/07.

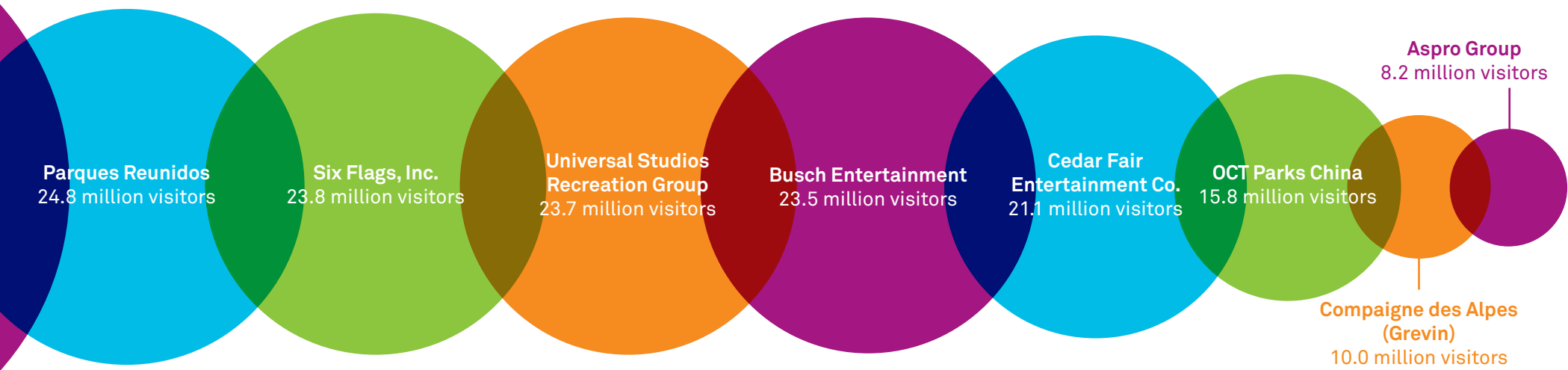
Source: TEA / AECOM

TOP 10 THEME PARK CHAINS



Walt Disney Attractions
119.1 million visitors

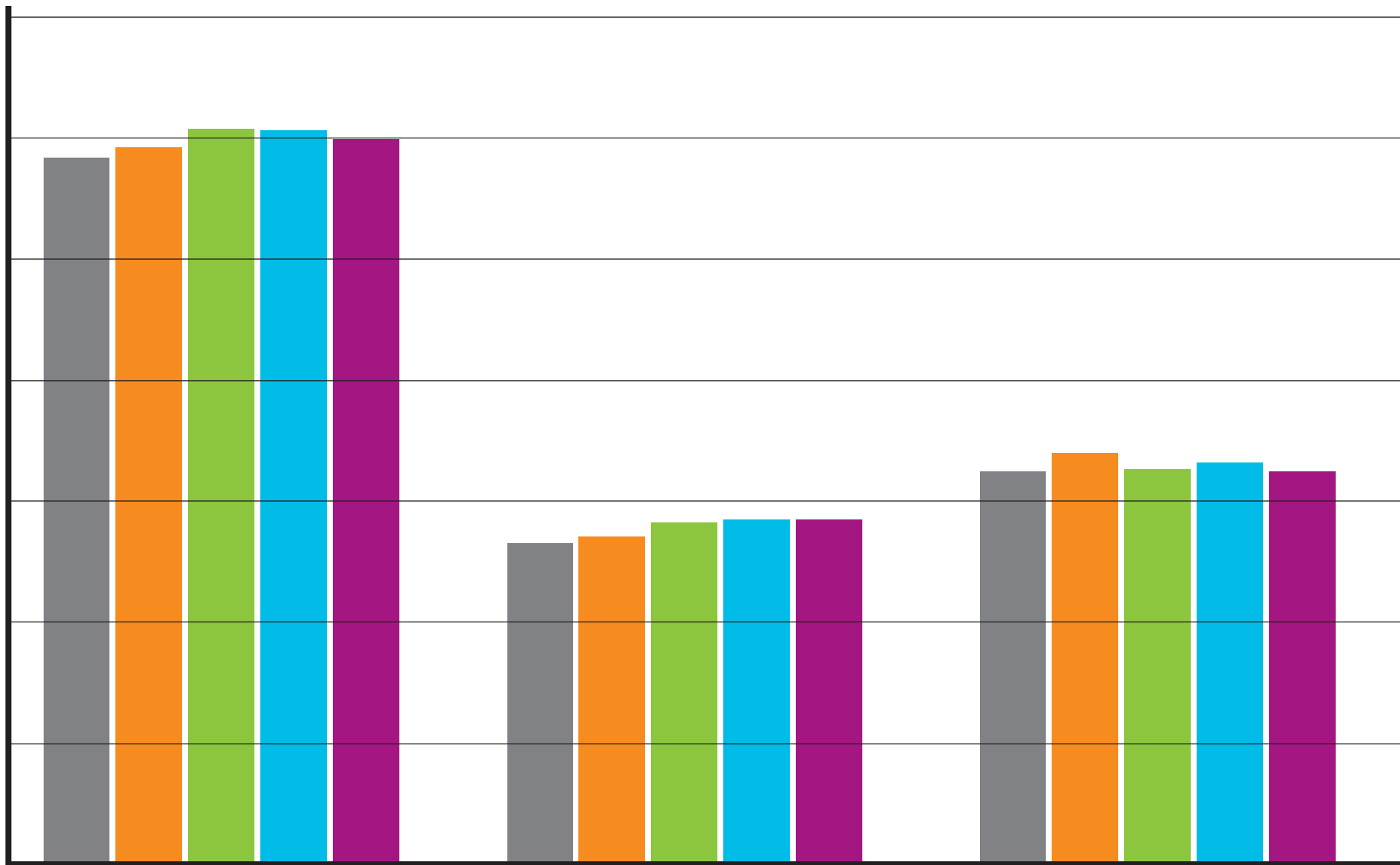
Merlin Entertainments Group
38.5 million visitors



CHARTING GLOBAL TRENDS

GLOBAL ATTENDANCE TRENDS TOP THEME PARKS AND WATERPARKS 2005-2009

140M VISITORS
120M VISITORS
100M VISITORS
80M VISITORS
60M VISITORS
40M VISITORS
20M VISITORS



TOP 20
NORTH AMERICAN
PARKS

TOP 20
EUROPEAN
PARKS

TOP 10
ASIAN
PARKS



TOP 10
LATIN AMERICAN
PARKS



TOP 15
U.S. WATERPARKS



TOP 20
GLOBAL WATERPARKS

REGIONAL NUMBERS

In 2009, North American parks experienced a slight decline of just over 1 percent, buoyed in large part by the strong performance of the Disney parks. In Europe and Asia, parks were slightly down, while Mexico and Latin America overall experienced an increase.



NEARLY 120 MILLION
PEOPLE VISITED WALT
DISNEY PARKS IN
THE UNITED STATES,
FRANCE, JAPAN AND
HONG KONG.

2009 THEME MAP

North America: Top 20 Parks

1. Magic Kingdom at Walt Disney World, Lake Buena Vista, FL, USA
2. Disneyland, Anaheim, CA, USA
3. Epcot at Walt Disney World, Lake Buena Vista, FL, USA
4. Disney's Hollywood Studios, Lake Buena Vista, FL, USA
5. Disney's Animal Kingdom, Lake Buena Vista, FL, USA
6. Disney's California Adventure, Anaheim, CA, USA
7. Seaworld Florida, Orlando, FL, USA
8. Universal Studios at Universal Orlando, Orlando, FL, USA
9. Islands of Adventure at Universal Orlando, Orlando, FL, USA
10. Universal Studios Hollywood, Universal City, CA, USA
11. Seaworld California, San Diego, CA, USA
12. Busch Gardens, Tampa Bay, FL, USA
13. Knott's Berry Farm, Buena Park, CA, USA
14. Canada's Wonderland, Maple, ON, Canada
15. Kings Island, Kings Island, OH, USA
16. Cedar Point, Sandusky, OH, USA
17. Busch Gardens Europe, Williamsburg, VA, USA
18. Hershey Park, Hershey, PA, USA
19. Six Flags Great Adventure, Jackson, NJ, USA
20. Six Flags Magic Mountain, Valencia, CA, USA
20. Six Flags Great America, Gurnee, IL, USA

SCALE Total visitors per year

15m

10m

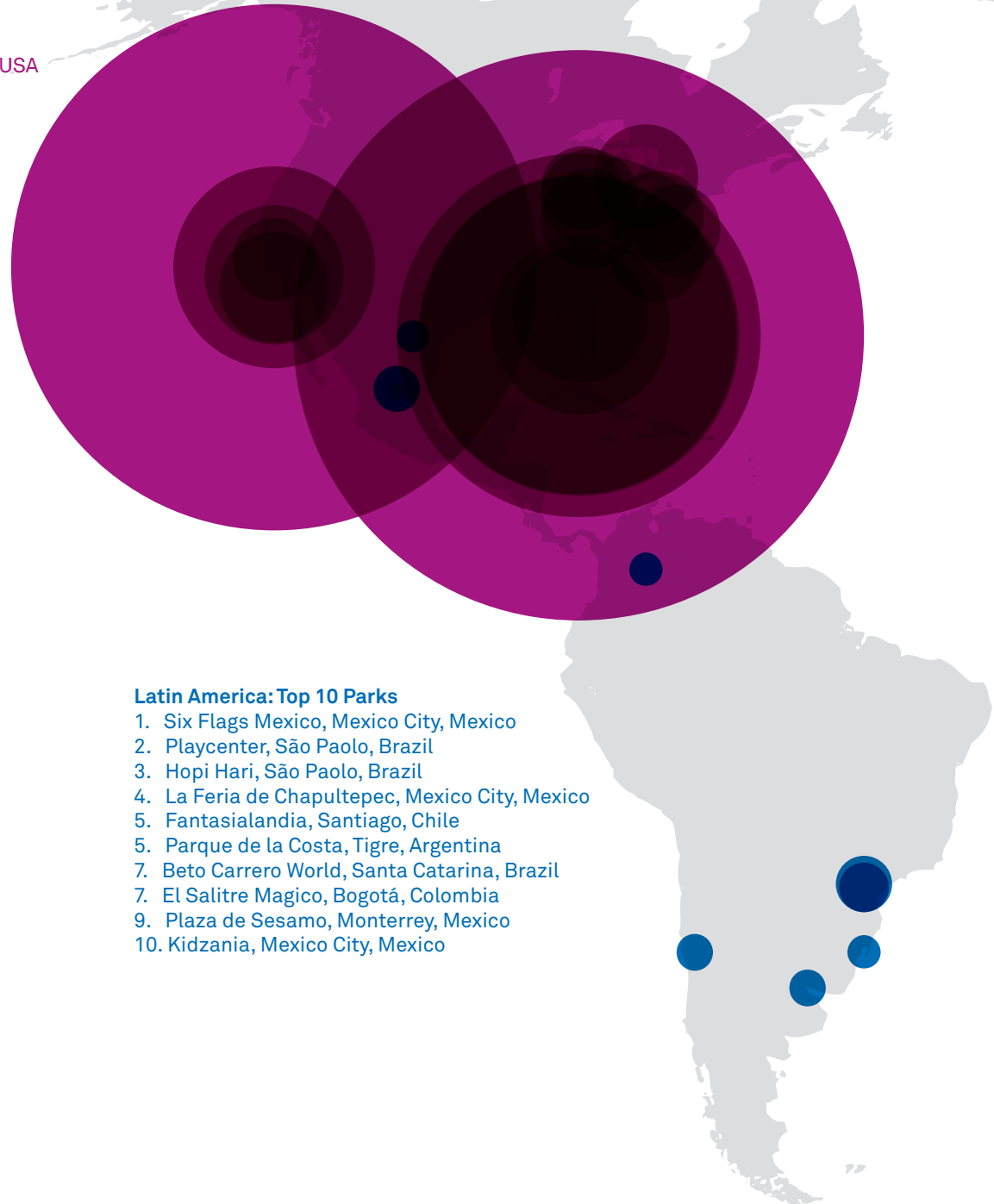
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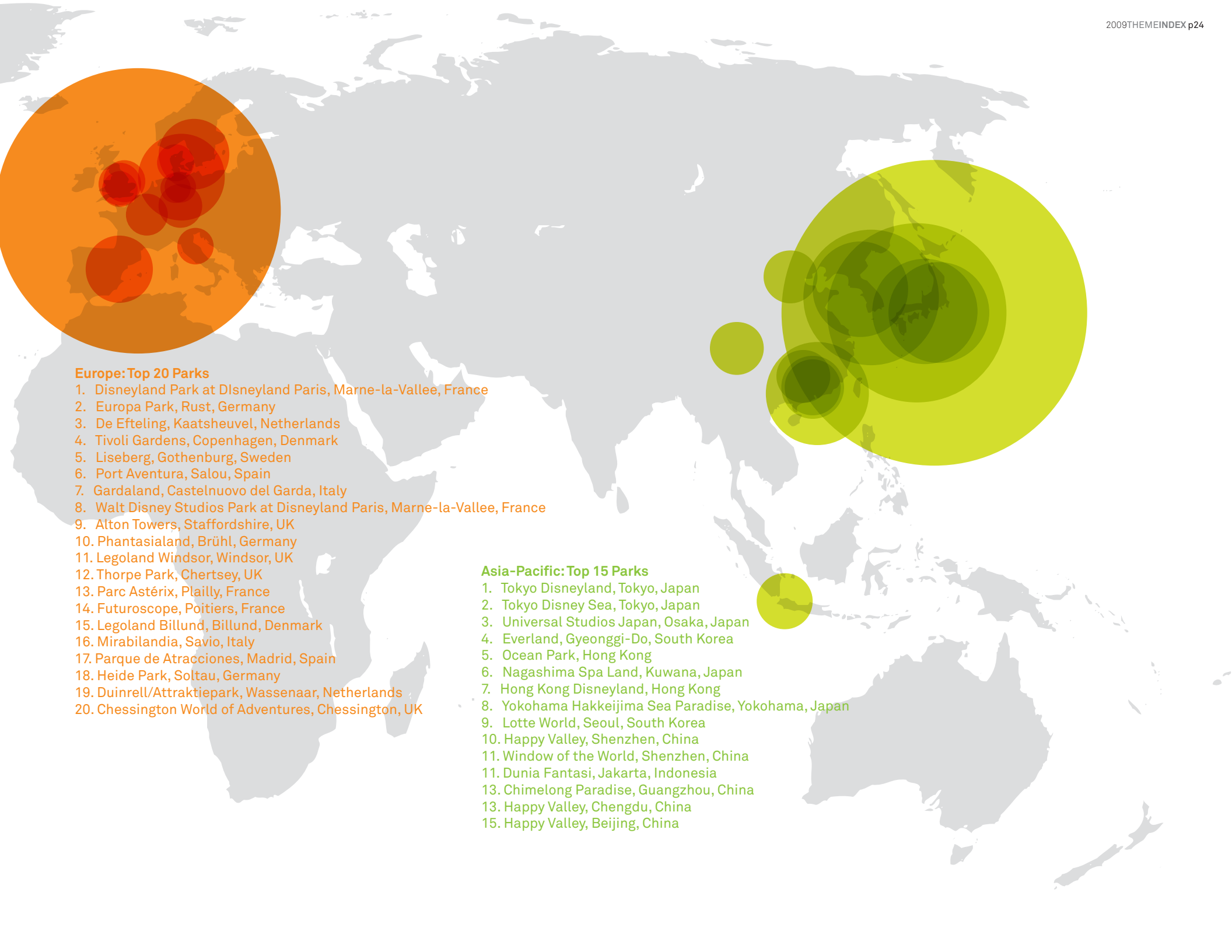
2m

1m

Latin America: Top 10 Parks

1. Six Flags Mexico, Mexico City, Mexico
2. Playcenter, São Paulo, Brazil
3. Hopi Hari, São Paulo, Brazil
4. La Feria de Chapultepec, Mexico City, Mexico
5. Fantasilandia, Santiago, Chile
5. Parque de la Costa, Tigre, Argentina
7. Beto Carrero World, Santa Catarina, Brazil
7. El Salitre Magico, Bogotá, Colombia
9. Plaza de Sesamo, Monterrey, Mexico
10. Kidzania, Mexico City, Mexico





Europe: Top 20 Parks

1. Disneyland Park at Disneyland Paris, Marne-la-Vallee, France
2. Europa Park, Rust, Germany
3. De Efteling, Kaatsheuvel, Netherlands
4. Tivoli Gardens, Copenhagen, Denmark
5. Liseberg, Gothenburg, Sweden
6. Port Aventura, Salou, Spain
7. Gardaland, Castelnuovo del Garda, Italy
8. Walt Disney Studios Park at Disneyland Paris, Marne-la-Vallee, France
9. Alton Towers, Staffordshire, UK
10. Phantasialand, Brühl, Germany
11. Legoland Windsor, Windsor, UK
12. Thorpe Park, Chertsey, UK
13. Parc Astérix, Plailly, France
14. Futuroscope, Poitiers, France
15. Legoland Billund, Billund, Denmark
16. Mirabilandia, Savio, Italy
17. Parque de Atracciones, Madrid, Spain
18. Heide Park, Soltau, Germany
19. Duinrell/Attraktiepark, Wassenaar, Netherlands
20. Chessington World of Adventures, Chessington, UK

Asia-Pacific: Top 15 Parks

1. Tokyo Disneyland, Tokyo, Japan
2. Tokyo Disney Sea, Tokyo, Japan
3. Universal Studios Japan, Osaka, Japan
4. Everland, Gyeonggi-Do, South Korea
5. Ocean Park, Hong Kong
6. Nagashima Spa Land, Kuwana, Japan
7. Hong Kong Disneyland, Hong Kong
8. Yokohama Hakkeijima Sea Paradise, Yokohama, Japan
9. Lotte World, Seoul, South Korea
10. Happy Valley, Shenzhen, China
11. Window of the World, Shenzhen, China
11. Dunia Fantasi, Jakarta, Indonesia
13. Chimelong Paradise, Guangzhou, China
13. Happy Valley, Chengdu, China
15. Happy Valley, Beijing, China

NORTH AMERICA

TOP 20 AMUSEMENT AND THEME PARKS

1	MAGIC KINGDOM at Walt Disney World Lake Buena Vista, FL, USA	17,233,000 visitors	↑ 1.0%
2	DISNEYLAND Anaheim, CA, USA	15,900,000 visitors	↑ 8.0%
3	EPCOT at Walt Disney World Lake Buena Vista, FL, USA	10,990,000 visitors	↑ 0.5%
4	DISNEY'S HOLLYWOOD STUDIOS at Walt Disney World Lake Buena Vista, FL, USA	9,700,000 visitors	↑ 1.0%
5	DISNEY'S ANIMAL KINGDOM at Walt Disney World Lake Buena Vista, FL, USA	9,590,000 visitors	↑ 0.5%
6	DISNEY'S CALIFORNIA ADVENTURE Anaheim, CA, USA	6,095,000 visitors	↑ 9.5%
7	SEAWORLD FLORIDA Orlando, FL, USA	5,800,000 visitors	↓ 6.8%
8	UNIVERSAL STUDIOS at Universal Orlando Orlando, FL, USA	5,530,000 visitors	↓ 10.0%
9	ISLANDS OF ADVENTURE at Universal Orlando Orlando, FL, USA	4,627,000 visitors	↓ 11.3%
10	UNIVERSAL STUDIOS HOLLYWOOD Universal City, CA, USA	4,308,000 visitors	↓ 6.0%
11	SEAWORLD CALIFORNIA San Diego, CA, USA	4,200,000 visitors	↓ 12.6%
12	BUSCH GARDENS TAMPA BAY Tampa, FL, USA	4,100,000 visitors	↓ 12.3%
13	KNOTT'S BERRY FARM Buena Park, CA, USA	3,333,000 visitors	↓ 6.5%
14	CANADA'S WONDERLAND Maple, ON, Canada	3,160,000 visitors	↓ 6.5%
15	KINGS ISLAND Kings Island, OH, USA	3,000,000 visitors	↓ 4.0%
16	CEDAR POINT Sandusky, OH, USA	2,942,000 visitors	↓ 8.0%
17	BUSCH GARDENS EUROPE Williamsburg, VA, USA	2,900,000 visitors	↑ 3.7%
18	HERSHEY PARK Hershey, PA, USA	2,807,000 visitors	↓ 1.2%
19	SIX FLAGS GREAT ADVENTURE Jackson, NJ, USA	2,634,000 visitors	↓ 4.6%
20*	SIX FLAGS MAGIC MOUNTAIN Valencia, CA, USA	2,500,000 visitors	↓ 2.5%
20*	SIX FLAGS GREAT AMERICA Gurnee, IL, USA	2,500,000 visitors	↓ 6.3%

Note: ** indicates a tie. Attendance figures are estimates, based on company information, annual reports, published information and from reliable TEA/AECOM industry and tourism sources. Percent changes for 2009 for certain parks are based on adjusted/updated figures for 2008, thus not directly comparable to published TEA/AECOM list for 2008/07. Source: TEA / AECOM

EUROPE

TOP 20 AMUSEMENT AND THEME PARKS

1	DISNEYLAND PARK at Disneyland Paris Marne-la-Vallee, France	12,740,000 visitors	↑ 0.4%
2	EUROPA PARK Rust, Germany	4,250,000 visitors	↑ 6.3%
3	DE EFTELING Kaatsheuvel, Netherlands	4,000,000 visitors	↑ 25.0%
4	TIVOLI GARDENS ¹ Copenhagen, Denmark	3,870,000 visitors	↓ 2.6%
5	LISEBERG ¹ Gothenburg, Sweden	3,150,000 visitors	↑ 3.3%
6	PORT AVENTURA ² Salou, Spain	3,000,000 visitors	↓ 9.1%
7	GARDALAND ³ Castelnuovo del Garda, Italy	2,900,000 visitors	↑ 4.0%
8	WALT DISNEY STUDIOS PARK at Disneyland Paris Marne-la-Vallee, France	2,655,000 visitors	↑ 1.6%
9	ALTON TOWERS Staffordshire, UK	2,650,000 visitors	↑ 5.0%
10	PHANTASIALAND Brühl, Germany	1,950,000 visitors	↑ 2.6%
11	LEGOLAND WINDSOR Windsor, UK	1,900,000 visitors	↑ 5.0%
12	THORPE PARK Chertsey, UK	1,870,000 visitors	↑ 10.0%
13	PARC ASTERIX Plailly, France	1,820,000 visitors	↑ 1.1%
14	FUTUROSCOPE Potiers, France	1,700,000 visitors	↑ 6.3%
15	LEGOLAND BILLUND Billund, Denmark	1,650,000 visitors	↔ 0%
16	MIRABILANDIA Savio, Italy	1,624,000 visitors	↑ 1.5%
17	PARQUE DE ATRACCIONES Madrid, Spain	1,500,000 visitors	↔ 0%
18	HEIDE PARK Soltau, Germany	1,400,000 visitors	↑ 5.0%
19	DUINRELL / ATTRAKTIEPARK Wassenaar, Netherlands	1,349,000 visitors	↓ 0.5%
20	CHESSINGTON WORLD OF ADVENTURES Chessington, UK	1,300,000 visitors	n/a

1. Attendance for Tivoli and Liseberg includes Christmas market operations.

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

3. Attendance for Gardaland is for theme park only (excluding waterpark and Sea Life Centre - separate tickets).

4. Bakken (No. 8 in the 2008 list) in Copenhagen was not included this year as guests do not buy a ticket to enter the part (it is not gated).

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ASIA-PACIFIC TOP 15 AMUSEMENT AND THEME PARKS

1	TOKYO DISNEYLAND Tokyo, Japan	13,646,000 visitors	↓ 4.5%
2	TOKYO DISNEY SEA Tokyo, Japan	12,004,000 visitors	↓ 4.0%
3	UNIVERSAL STUDIOS JAPAN Osaka, Japan	8,000,000 visitors	↓ 3.6%
4	EVERLAND¹ Gyeonggi-Do, South Korea	6,169,000 visitors	↓ 6.5%
5	OCEAN PARK Hong Kong	4,800,000 visitors	↓ 4.6%
6	NAGASHIMA SPA LAND Kuwana, Japan	4,700,000 visitors	↑ 1.1%
7	HONG KONG DISNEYLAND Hong Kong	4,600,000 visitors	↑ 2.0%
8	YOKOHAMA HAKKEIJIMA SEA PARADISE Yokohama, Japan	4,500,000 visitors	↓ 0.7%
9	LOTTE WORLD² Seoul, South Korea	4,261,000 visitors	↑ 0.6%
10	HAPPY VALLEY Shenzhen, China	2,800,000 visitors	↓ 11.9%
11*	WINDOW OF THE WORLD Shenzhen, China	2,500,000 visitors	↓ 4.9%
11*	DUNIA FANTASI Jakarta, Indonesia	2,500,000 visitors	↓ 3.8%
13*	CHIMELONG PARADISE Guangzhou, China	2,400,000 visitors	↓ 7.7%
13*	HAPPY VALLEY Chengdu, China	2,400,000 visitors	new park
15	HAPPY VALLEY Beijing, China	2,350,000 visitors	↑ 11.9%

1. Everland attendance does not include Caribbean Bay water park visitation.

2. Lotte World attendance only includes theme park.

Note: '*' indicates a tie. Attendance figures are estimates, based on company information, annual reports, published information and from reliable TEA/AECOM industry and tourism sources. Percent changes for 2009 for certain parks are based on adjusted/updated figures for 2008, thus not directly comparable to published TEA/AECOM list for 2008/07. **Source: TEA / AECOM**

LATIN AMERICA

TOP 10 AMUSEMENT AND THEME PARKS

1	SIX FLAGS MEXICO Mexico City, Mexico	1,950,000 visitors	↓ 3.5%
2	PLAYCENTER São Paulo, Brazil	1,700,000 visitors	↑ 6.3%
3	HOPI HARI São Paulo, Brazil	1,500,000 visitors	↑ 2.9%
4	LA FERIA DE CHAPULTEPEC Mexico City, Mexico	1,400,000 visitors	↓ 5.0%
5*	FANTASIALANDIA Santiago, Chile	1,100,000 visitors	↔ 0%
5*	PARQUE DE LA COSTA Tigre, Argentina	1,100,000 visitors	↑ 6.2%
7*	BETO CARRERO WORLD Santa Catarina, Brazil	1,000,000 visitors	n/a
7*	EL SALITRE MAGICO Bogotá, Colombia	1,000,000 visitors	↓ 6.6%
9	PLAZA DE SESAMO Monterrey, Mexico	970,000 visitors	↓ 5.4%
10	KIDZANIA Mexico City, Mexico	601,000 visitors	↓ 24.1%

Note: '*' indicates a tie. Attendance figures are estimates, based on company information, annual reports, published information and from reliable TEA/AECOM industry and tourism sources. Percent changes for 2009 for certain parks are based on adjusted/updated figures for 2008, thus not directly comparable to published TEA/AECOM list for 2008/07. **Source: TEA / AECOM**

TOP 20 WATERPARKS UNITED STATES

1	TYPHOON LAGOON at Walt Disney World Lake Buena Vista, FL	2,059,000	visitors	↔ 0%
2	BLIZZARD BEACH at Walt Disney World Lake Buena Vista, FL	1,891,000	visitors	↔ 0%
3	AQUATICA Orlando, FL	1,600,000	visitors	↓ 6.8%
4	WET 'N WILD Orlando, FL	1,235,000	visitors	↓ 5.0%
5	SCHLITTERBAHN New Braunfels, TX	900,000	visitors	↑ 2.0%
6	WATER COUNTRY USA Williamsburg, VA	700,000	visitors	↓ 2.2%
7	ADVENTURE ISLAND Tampa, FL	600,000	visitors	↑ 9.3%
8	SCHLITTERBAHN Galveston, TX	530,000	visitors	↓ 5.0%
9	HYLAND HILLS WATER WORLD Denver, CO	515,000	visitors	↓ 3.4%
10	SPLISH-SPLASH Riverhead, NY	495,000	visitors	↓ 1.0%
11	NOAH'S ARK Wisconsin Dells, WI	490,000	visitors	↓ 8.1%
12	RAGING WATERS San Dimas, CA	466,000	visitors	↓ 3.1%
13*	SIX FLAGS WHITE WATER Marietta, GA	450,000	visitors	↓ 8.2%
13*	SIX FLAGS HURRICANE HARBOR Arlington, TX	450,000	visitors	↓ 1.1%
15	DOLLYWOOD'S SPLASH COUNTRY Pigeon Forge, TN	446,000	visitors	↓ 2.0%
16	WET 'N WILD EMERALD POINT Greensboro, NC	390,000	visitors	n/a
17	SOAK CITY CEDAR POINT Sandusky, OH	375,000	visitors	n/a
18	SIX FLAGS HURRICANE HARBOR Jackson, NJ	360,000	visitors	n/a
19	CAMELBEACH Tannersville, PA	350,000	visitors	n/a
20	ZOOMEZI BAY Powell, OH	325,000	visitors	n/a

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ABOUT THIS STUDY

The TEA/AECOM Attraction Attendance Report identifies the top commercial theme parks and waterparks around the world and reflects their performance for the previous year. Global attendance data are broken down by geographic region, by chain and by type of venue. The report is a valuable business reference and resource for the industry.

This vital report is issued annually and jointly produced and distributed by the TEA (Themed Entertainment Association) – the leading international trade alliance for the creators of compelling experiences and places – and the Economics practice at AECOM, formerly Economics Research Associates (ERA) – the world leader in economic consulting for the entertainment and leisure industry. The Economics practice at AECOM began producing the report in 2004 (as the Amusement Business-ERA Year End Attendance Report), which became the TEA-ERA Year End Attendance Report as of 2006, and is now produced by TEA and AECOM.

AECOM obtains the figures used to create the TEA/AECOM Attraction Attendance 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 is also studied separately: North America, Mexico/Latin America, Europe and Asia. 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 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. Both external and internal factors including development costs, pricing, customer service, weather, demographics, investment/expansion, and other dynamics impact the estimated numbers.

TEA and AECOM express thanks to the numerous park operators who graciously and generously furnished attendance information, enabling this report to be as complete and accurate as possible.

The Economics practice at AECOM (formerly Economics Research Associates) is the world leader in real estate consulting services. It advises clients on economic and financial planning issues for a myriad of commercial land uses, including theme parks, hotels and resorts, sports venues and major events, cultural facilities, tourism, complex mixed-use developments as well as economic regeneration schemes. The Economics practice at AECOM has made important contributions to some of the world's most innovative and successful projects. AECOM (NYSE: ACM) is a global provider of professional technical and management support services to a broad range of markets, including transportation, facilities, environmental, energy, water and government. A Fortune 500 company, AECOM employs approximately 45,000 people and serves clients in more than 100 countries and had revenue of \$6.1 billion during the 12-month period ended December 31, 2009. More information on AECOM and its services can be found at www.aecom.com.

The TEA (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 39 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/AECOM Global Attraction Attendance Report, TEA Project Management Guidelines, and TEA Annual & Directory. Visit www.TEAconnect.org.

