



IAAPA FAMILY ENTERTAINMENT CENTER BENCHMARK REPORT FOR FY2019

September 2020



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IAAPA is the premier trade association representing the diverse and ever-changing attractions industry. For more than a century we have connected companies of all sizes, and people of all levels to provide meaningful experiences for their guests around the world.

IAAPA hosts global events and conferences that spread successful ideas and practices. We also provide valuable tools and resources that make all of our businesses smarter, safer, and more profitable, while delivering guest experiences that surprise and delight.

With more than 6,000 member companies from more than 100 countries, IAAPA is the sum of its unique perspectives. And when we inspire each other, we move the attractions industry forward. IAAPA is a non-profit organization.

The association's global headquarters is in Orlando, Florida, in the United States. It maintains regional offices in Brussels; Hong Kong; Mexico City; Shanghai; and Alexandria, Virginia

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Strategic global market research

provider with over 40 years
researching international markets

About Euromonitor International

Our Services

- Syndicated market research
- Custom research and consulting

Expansive Network

- On-the-ground researchers in 80 countries
- Complete view of the global marketplace
- Cross-comparable data across every market

Our Expertise

- Consumer trends and lifestyles
- Companies and brands
- Product categories and distribution channels
- Production and supply chains
- Economics and forecasting
- Comparable data across markets



BACKGROUND

Survey methodology

SURVEY OUTREACH AND ACCESS

- Respondents came from a variety of sources, including:
 - Current FEC members of IAAPA
 - Respondents who completed IAAPA's previous FEC Benchmark Surveys
 - Various parties interested in the FEC industry, who agreed to send Emails to their customers/contacts on behalf of IAAPA
 - Visitors to the IAAPA website (www.iaapa.org)
 - Various member associations serving the FEC industry who sent Emails on behalf of IAAPA
 - An Email, with a link to the online version of the survey

RESPONDENT PROFILE

- Potential respondents were provided access to the survey via online links delivered using several methods, all available exclusively online. Methods of delivery were as follows:
 - An Email, with a link to an internet version of the survey was delivered several times.
 - Survey links were prominently available at www.iaapa.org and through its various social media channels—predominantly LinkedIn.
 - The survey was delivered to readers of IAAPA's "News Flash" e-newsletter
 - Outreach was conducted by industry leaders serving on IAAPA committees.

INCENTIVES

- The first 50 respondents to fully complete the survey were given a \$100 global Visa gift card.
- Respondents could answer either for an individual location or for the corporation.

BACKGROUND

Facility definitions used for reporting

Family Entertainment Centers (FECs)

FECs have evolved to include a variety of attractions and experiences, and those facilities are the focus of this survey. For the purposes of this survey, an FEC must have had more than just a single type of attraction to participate.

Some common characteristics of an FEC include:

- Primarily offers some combination of at least three participatory activities (including but not limited to go-karts, batting cages, miniature golf, arcades, video games, trampolines, climbing walls, laser tag, birthday parties, kiddie rides (iron rides included), inflatables, bowling alleys, indoor playground, etc.) as well as some type of food concession or service.
- Is often located within a commercial, tourist, or entertainment complex.
- Admissions vary with many having games and attractions being “pay-as-you-go” and some charging a general admission fee. Those with a general admission fee may have some activities with an additional fee.
- It may or may not be “gated” based on its admissions policy.
- Often indoors but can be outdoors or a combination of indoor and outdoor.
- May target a certain age group or specific market such as children's entertainment center or adult entertainment center.

The following sections of this report have the overall results from 201 FECs that completed the IAAPA Benchmark Series Survey for 2020.

BACKGROUND

Report segmentation

FECs

The following sections of this report have the overall results from 201 FECs that completed the IAAPA Benchmark Series Survey for 2020.

Following each of these sections is an appendix section. The appendix has tables and the summary analysis are further divided (cross-tabulated) by the following three criteria for a more thorough analysis of some questions:

Facility type	<ul style="list-style-type: none"> • Indoor only • Outdoor only • Both indoor and outdoor
Guest attendance	<ul style="list-style-type: none"> • Less than 50,000 • 50,001–150,000 • 150,001–500,000 • 500,001–1 million • More than 1 million
Region	<ul style="list-style-type: none"> • Asia Pacific • Latin America and the Caribbean • Europe/Middle East/Africa • United States/Canada
FEC type	<ul style="list-style-type: none"> • As a corporation • For an individual location

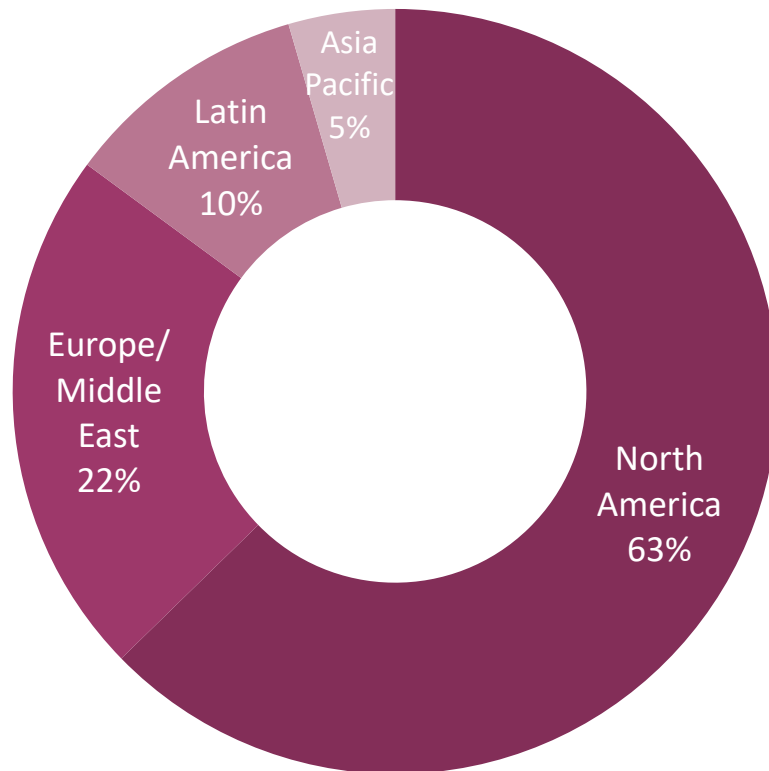
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RESPONDENT DEMOGRAPHICS

Nearly two-thirds of FEC respondents are located in the United States.

Regional Breakdown of Total FEC Respondents













Specific Country	Overall	Corporate	Individual
United States	117	36	81
• Northeast	25	7	18
• South	49	11	38
• Midwest	30	12	18
• West	13	6	7
Canada	9	4	5
Eastern Europe	11	7	4
Western Europe	27	15	12
Middle East	5	5	0
Latin America	21	16	5
Australia/ New Zealand	1	1	0
China	4	1	3
Other Asia Pacific	4	1	3
Africa	2	2	0

Q1.2 In what country or region is the facility located or headquartered? (n: overall=201, corporate=88, individual=113)

RESPONDENT DEMOGRAPHICS

82 percent of FECs focus on entertaining the whole family; arcades and video games are the most common main activity offered.

FEC Description		North America	Europe/ Middle East	Latin America	Asia Pacific
Arcade and video games	 20%	19%	11%	48%	11%
Go-karting facility	 11%	17%	0%	10%	0%
Indoor playground	 11%	8%	24%	0%	22%
Bowling center	 11%	12%	11%	10%	0%
Inflatable center	 9%	10%	7%	14%	0%
Laser tag center	 7%	6%	9%	0%	11%
Trampoline center	 7%	5%	11%	5%	11%
Outdoor adventure facility	 4%	2%	9%	0%	11%
Miniature-golf course	 3%	5%	0%	0%	0%
Ziplines/rope course	 3%	5%	0%	0%	0%
		n=126	n=45	n=21	n=9

- 82 percent of respondents described their facility as “whole family entertainment center”, while 16 percent said, “children’s entertainment center”, and two percent “adult entertainment center”.

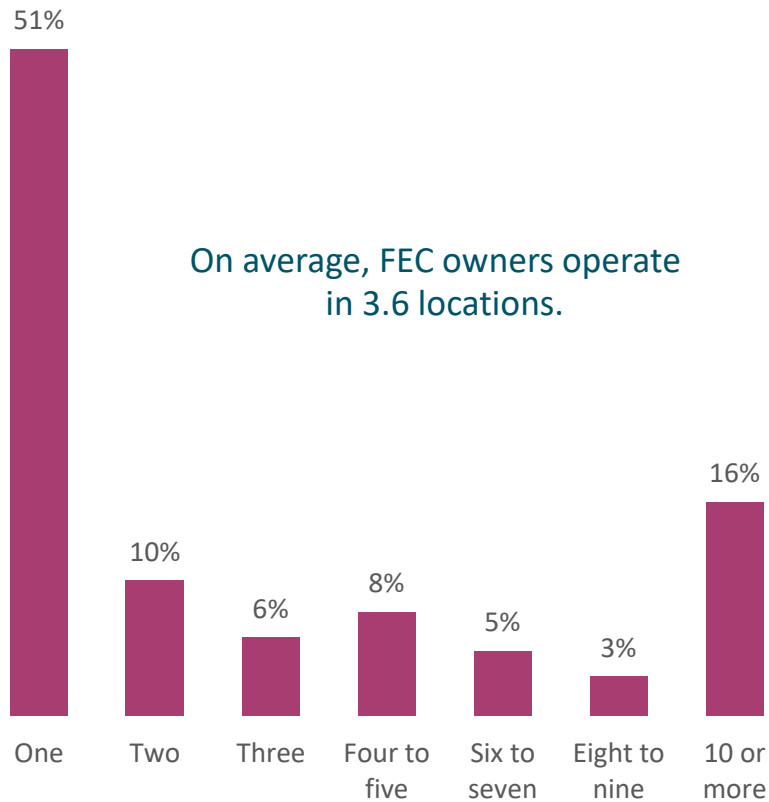
Q1.1a Which phrase best describes the primary focus of the FEC(s) being reported on for this survey? (Choose the option that best describes the facility.) (n=201)

Q1.1b. Which is the main activity at your FEC(s)? (n=201)

RESPONDENT DEMOGRAPHICS

Half of all FECs operated in one location in 2019.

Number of Locations



Other Facilities Operated by Multiple Location Owners (n=98)	n=	%
FEC	94	96%
Amusement park	12	12%
Water park	2	2%
Other attraction	16	16%
Zoo and aquarium	0	0%
Museum and science center	1	1%

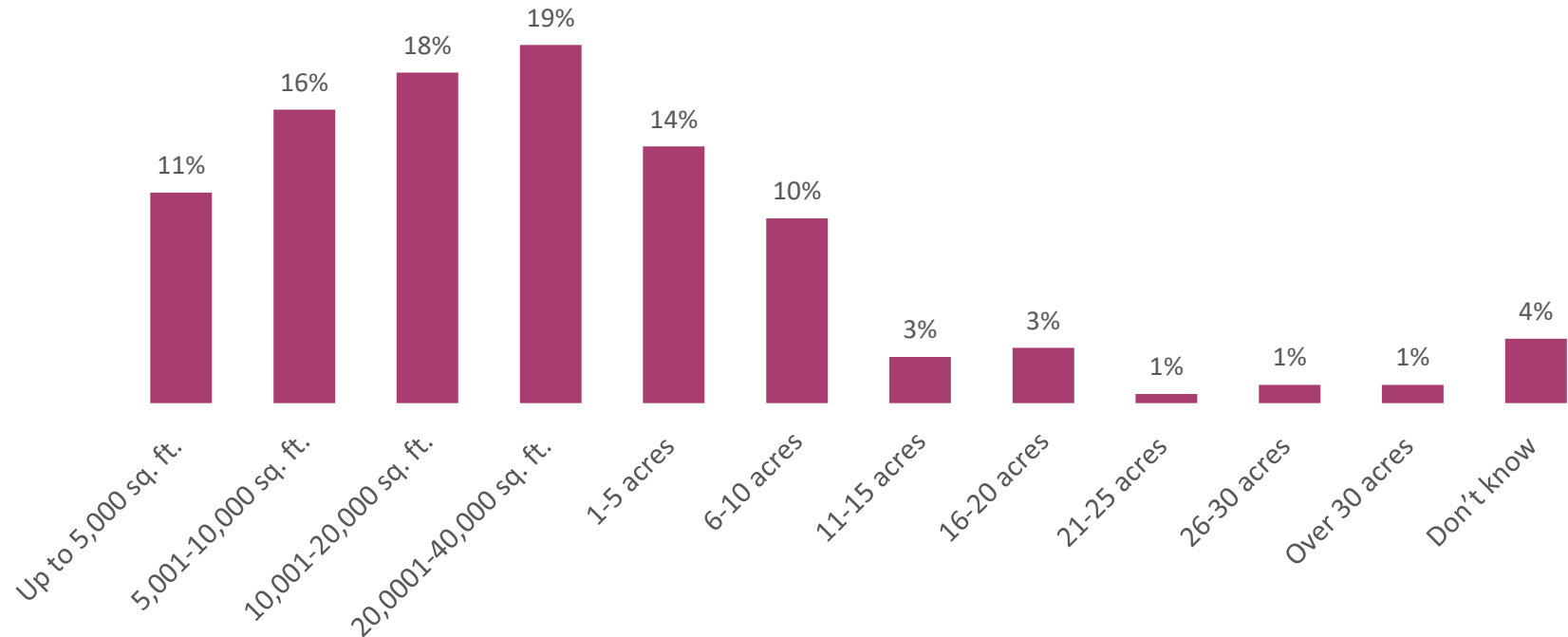
- Of FECs surveyed in 2020, 51 percent operated in one location, which is slightly lower than 57 percent surveyed in 2019.
- In Latin America, 86 percent of FECs surveyed own multiple facilities, highest of all regions.
- 62 percent of operators in North America own only one facility, highest of all regions.

Q2.2 How many locations does your company own or operate in total, including the facility you are reporting on for this survey? (n=201)

RESPONDENT DEMOGRAPHICS

Like previous years, most FECs are between 20,001 and 40,000 sq. ft. in total size.

Facility Size (% of respondents)



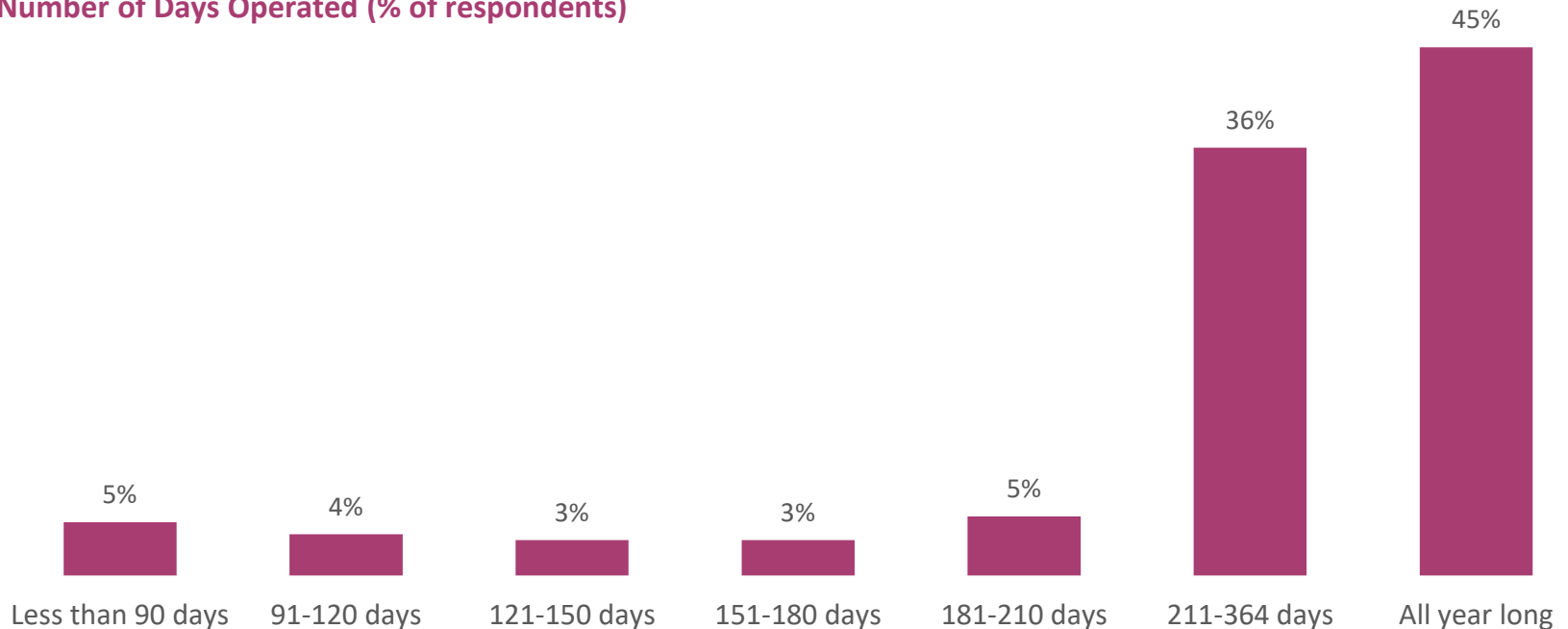
- The average area of FECs surveyed in 2020 is 3.1 acres.
- FECs in North America at an average of 3.9 acres were found to operate the largest facilities relative to other regions.
- The average size of individual location facilities is 2.8 acres, whereas, corporate facilities average 2.8 acres.

Q2.4 How large is the FEC being reported on for this survey (total sq. ft./acreage, including dedicated guest parking and behind-the-scenes areas)? Please select the most accurate size below. (n=201)

RESPONDENT DEMOGRAPHICS

FECs reported operating an average of 294 days in 2019.

Number of Days Operated (% of respondents)



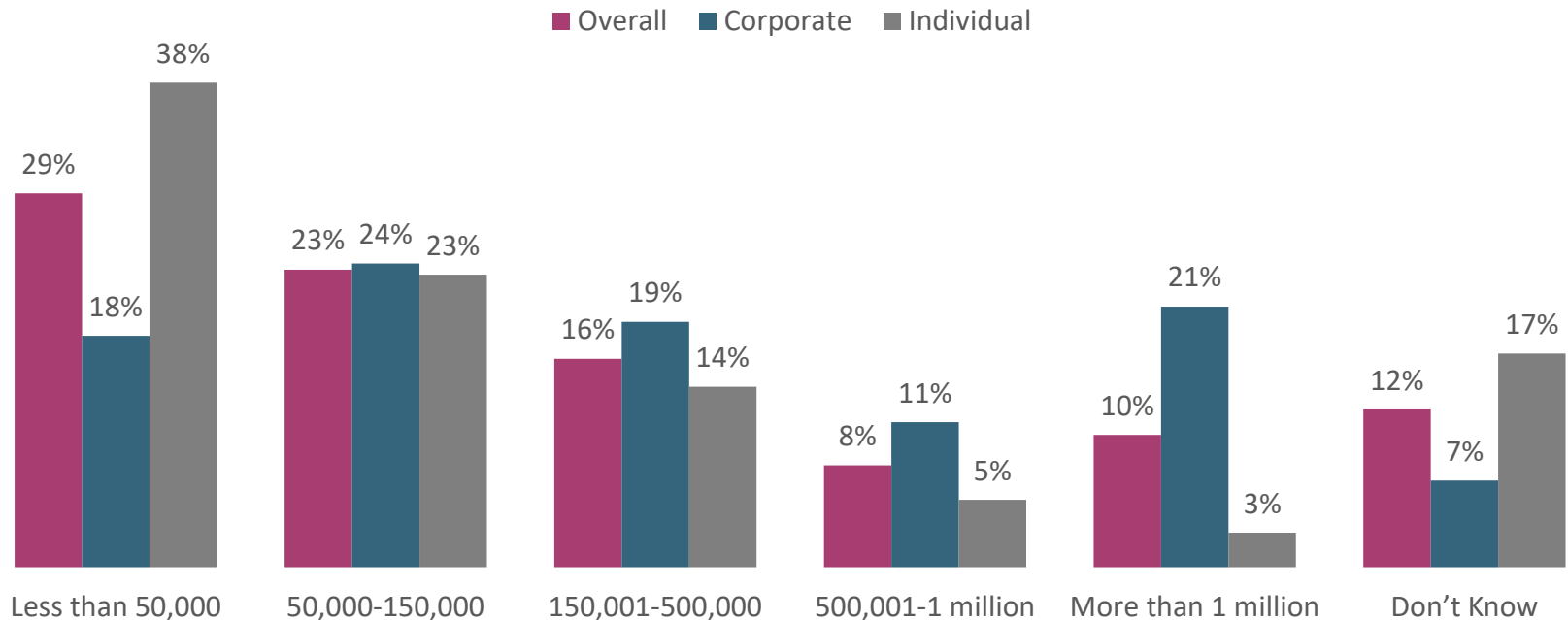
- 45 percent of FECS surveyed in 2020 operated all year long vs. 48 percent of FECs surveyed in 2019.
- Facilities located in Asia Pacific operated for fewer days than those in other regions.
- Corporate FECs operated for more days than individual location facilities (307 days vs. 285 days).

Q2.5 How many days did this facility operate (covers both public or private events or full or partial days)? (n=201)

RESPONDENT DEMOGRAPHICS

On average, all FECs reported 321,733 visitors in 2019. Corporate facilities averaged 468,598 visitors, whereas individual location facilities averaged 193,617 visitors.

Estimated Total Attendance (% of respondents)



- Among regions, FEC facilities in Latin America received the highest number of visitors in 2019 (396,429 on average), followed by Europe/Middle East with average visitors of 364,773.

Q2.6 What was the estimated total attendance for this facility? (n: overall=201, corporate=88, individual=113)

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II. RESPONDENT DEMOGRAPHICS

III. **FEC BENCHMARKS**

ADMISSIONS

ATTRACTIONS

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PARKING

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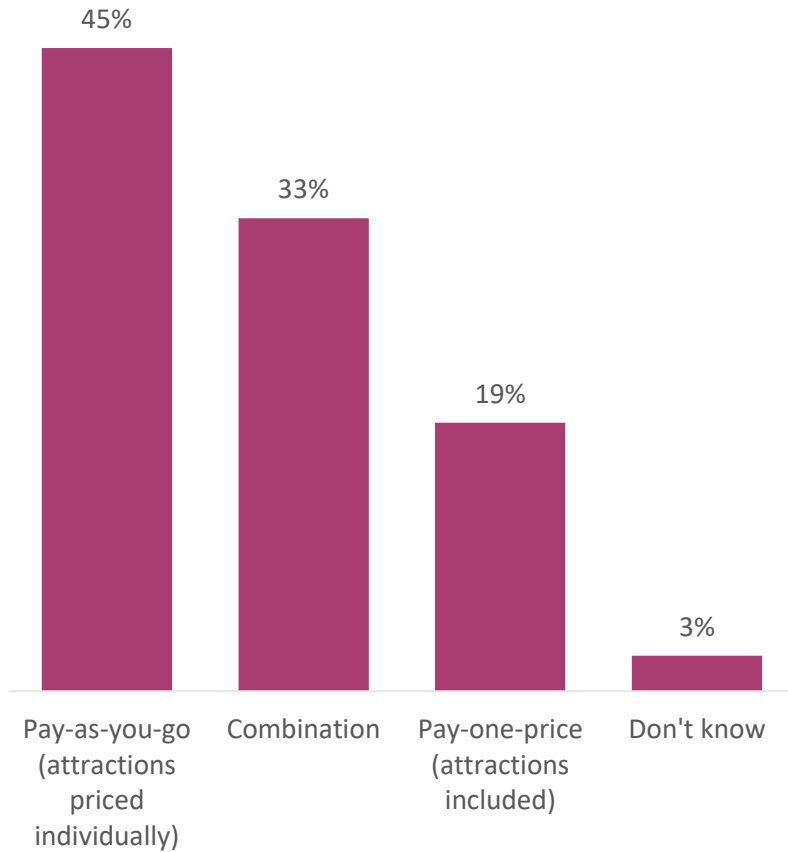
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ADMISSIONS

Average one-day prices at FECs were \$19.41, with attractions priced at \$12.46.

Admission Pricing Policy (% of respondents)



Entry for One-Day, General Admission Cost at the Park (in U.S. dollars)	Overall (n=105)
\$1-10	29%
\$11-20	31%
\$21-30	23%
\$31-40	14%
\$41-50	2%
\$51-125	0%
More than \$125	1%

Average (US\$) **\$19.41**

Average Cost per Attraction for Facilities With Pay-as-You-Go Pricing (in U.S. dollars)	Overall (n=158)
\$1-3	14%
\$4-6	11%
\$7-9	19%
\$10-12	22%
\$13-15	6%
\$16-18	2%
\$19-21	2%
\$22-25	8%
More than \$25	16%

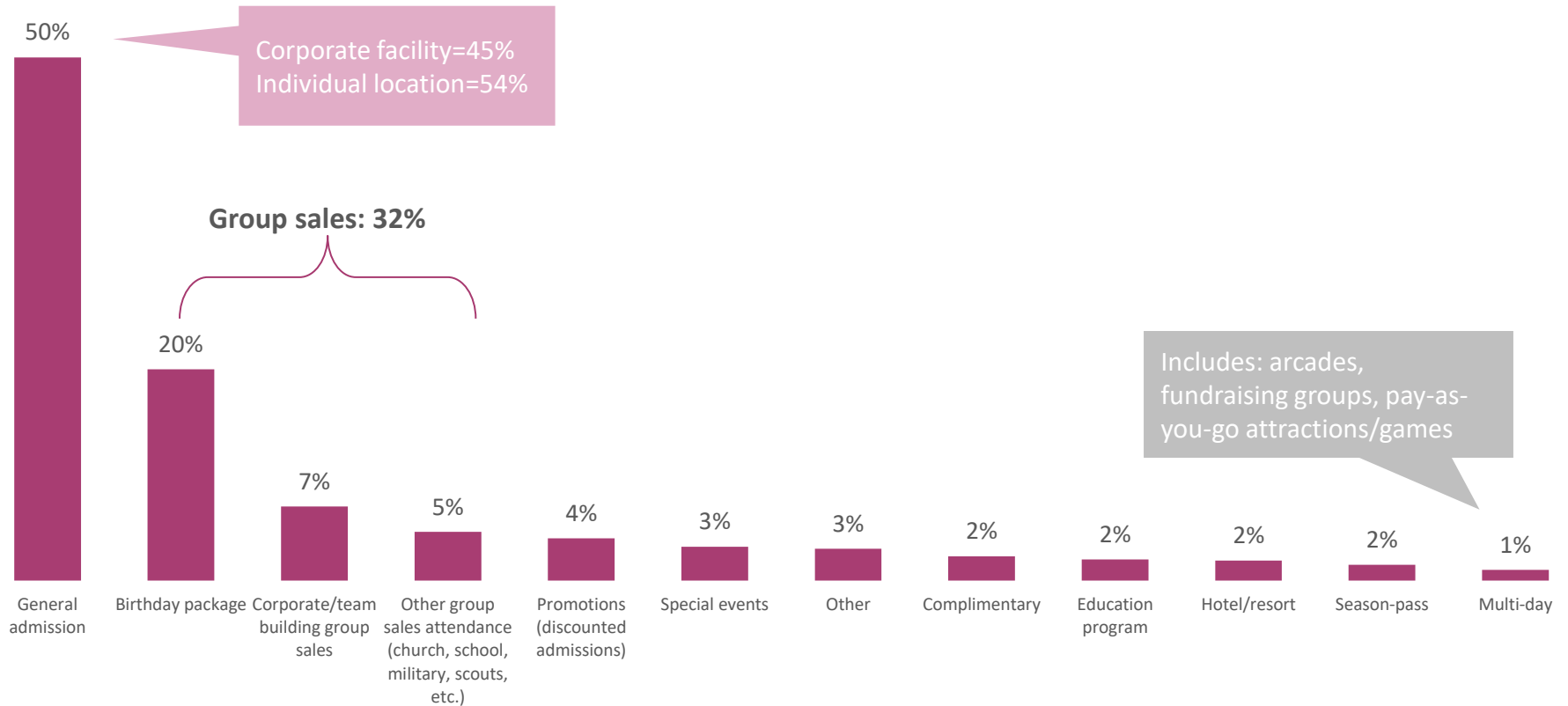
Average (US\$) **\$12.46**

Q3.1 What statement below best describes the admission pricing policy at the facility? (n=201)

ADMISSIONS

In 2019, FECs reported 50 percent of all attendance entered under general admission tickets.

Admission Category of Total Attendance (avg. %) in 2019



Q3.4 Of the facility's total attendance in 2019, approximately what percentages fell into the following [...] (n=140, remaining did not answer)

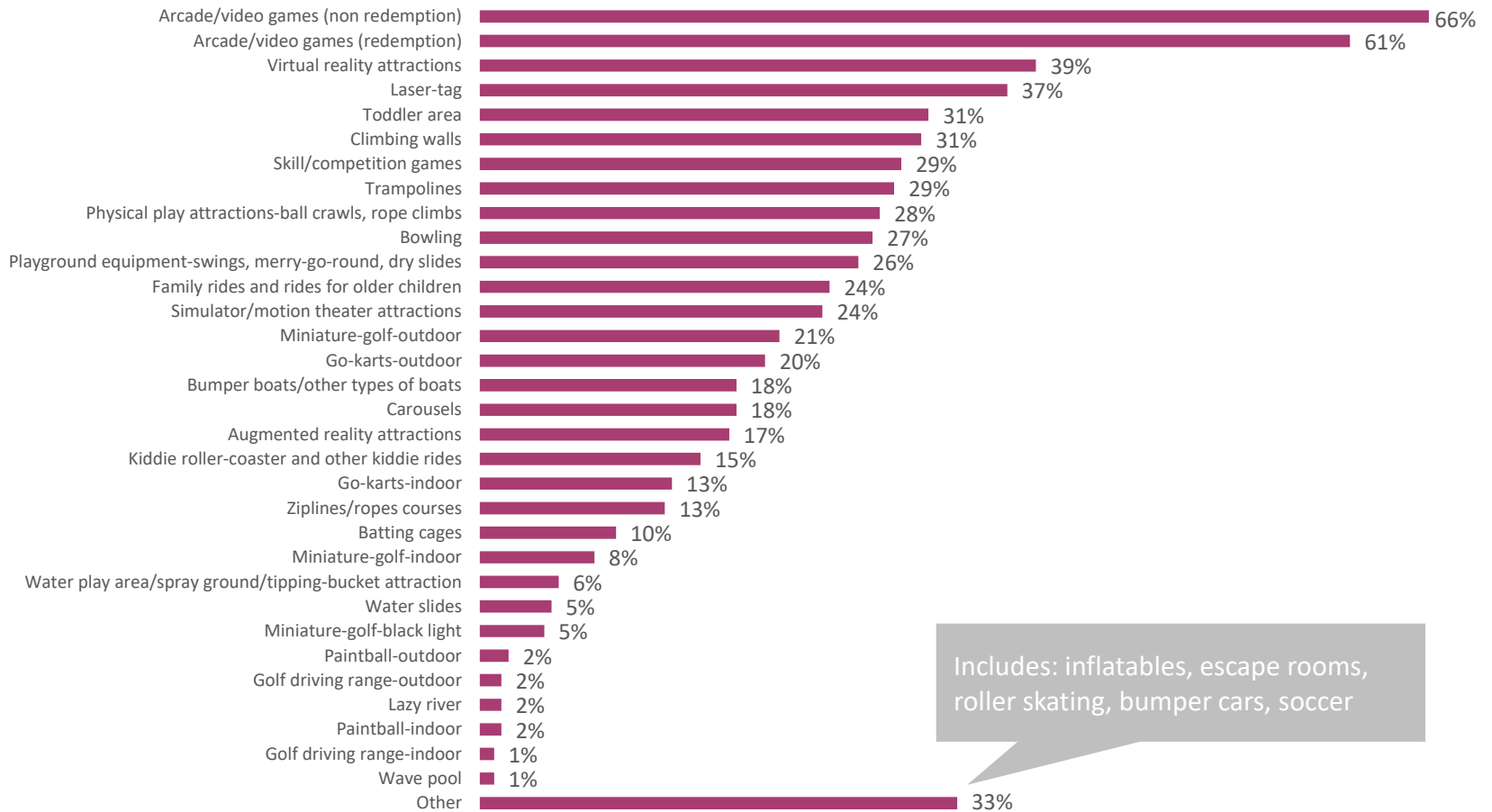
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ATTRACTIONS

Arcade/video games are the most common attractions for FECs.

Current Attractions at Facility (% of respondents)



Q4.1 What attractions do you currently have at the facility? Please select all that apply. (n=201)

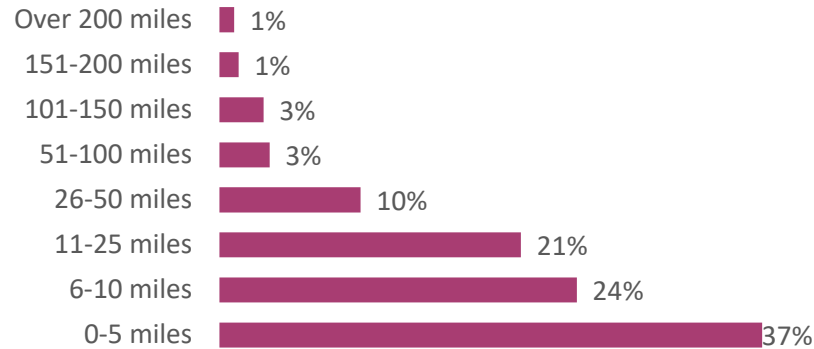
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GUESTS – CORPORATE FEC RESPONDENTS ONLY

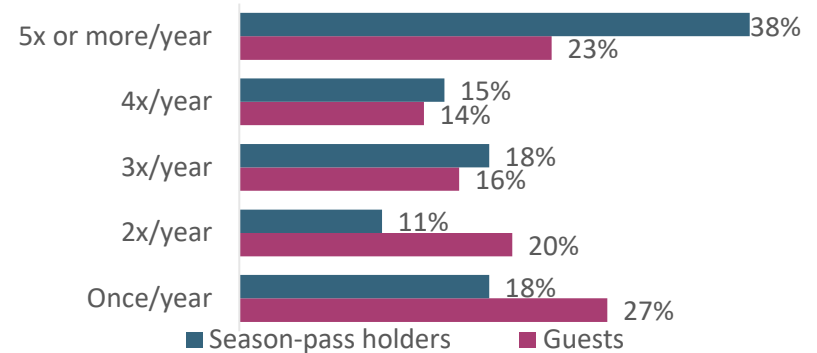
Corporate FEC guests averaged 20 years old, traveled 20.8 miles, and spent an average of 2.3 hours per visit as reported in 2020.

Distance Traveled by Guests to Visit (avg. %)



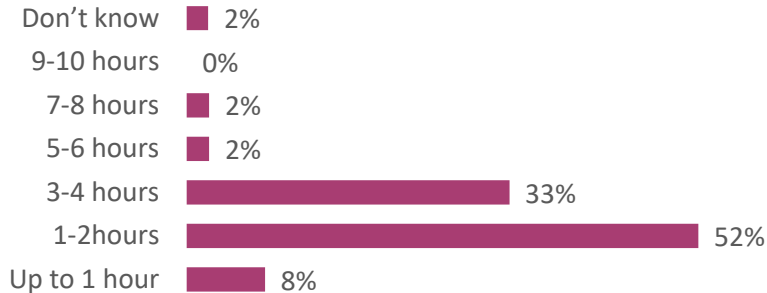
Average distance traveled = **20.8 miles**

Visit Frequency (avg. %)



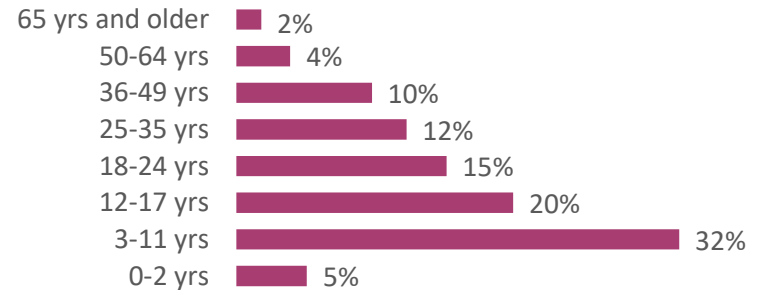
3.4 times vs. **2.9 times** on average

Average Length of Stay per Visit



Average stay = **2.3 hours**

Guests' Age Bracket (avg. %)



Average age = **19.6 years old**

Q5.1 How far do your guests typically travel to visit the facility? (n=67)

Q5.2 Approximately how many hours do your guests spend at the facility (average length of stay) each time they visit? (n=88)

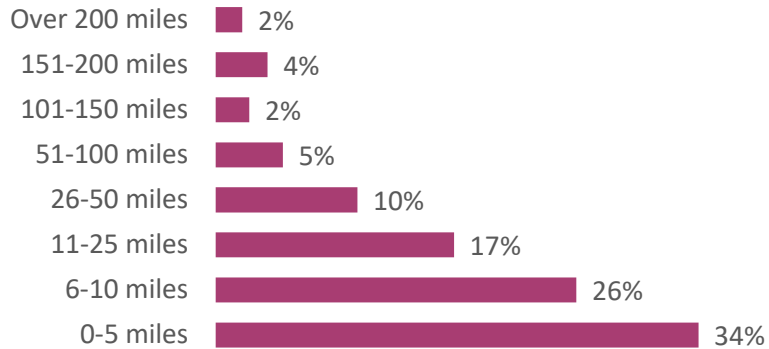
Q5.3 How often do guests visit the facility? (Guests, n=54; Season-pass holders, n=31)

Q5.4 Approximately what percentage of your guests falls into the following age categories? (n=64)

GUESTS – INDIVIDUAL LOCATION FEC RESPONDENTS ONLY

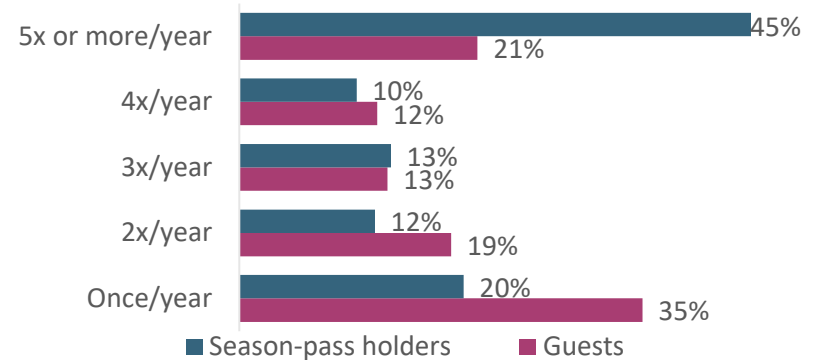
Individual location FEC guests averaged 19 years old, traveled 26.8 miles and, spent an average of 2.6 hours per visit as reported in 2020.

Distance Traveled by Guests to Visit (avg. %)



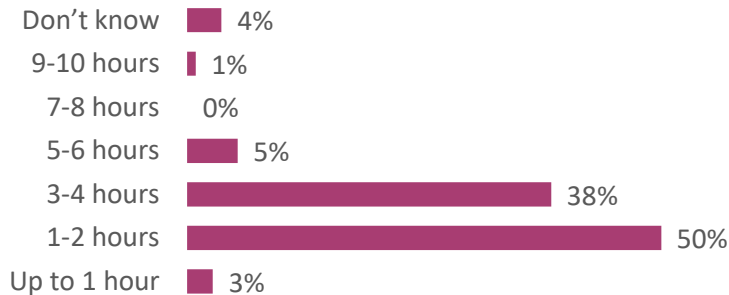
Average distance traveled = **26.8 miles**

Visit Frequency (avg. %)



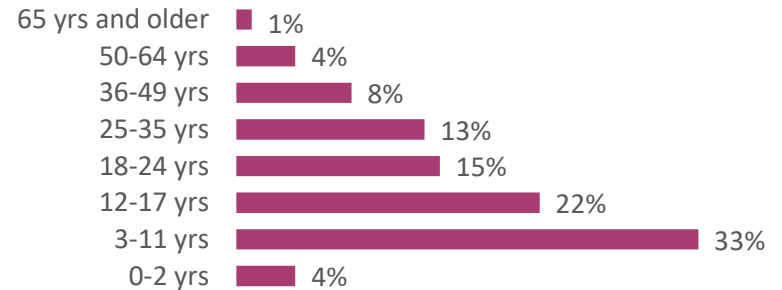
3.5 times vs. **2.6 times** on average

Average Length of Stay per Visit



Average stay = **2.6 hours**

Guests' Age Bracket (avg. %)



Average age = **19.1 years old**

Q5.1 How far do your guests typically travel to visit the facility? (n=70)

Q5.2 Approximately how many hours do your guests spend at the facility (average length of stay) each time they visit? (n=113)

Q5.3 How often do guests visit the facility? (Guests, n=57; Season-pass holders, n=32)

Q5.4 Approximately what percentage of your guests falls into the following age categories? (n=72)

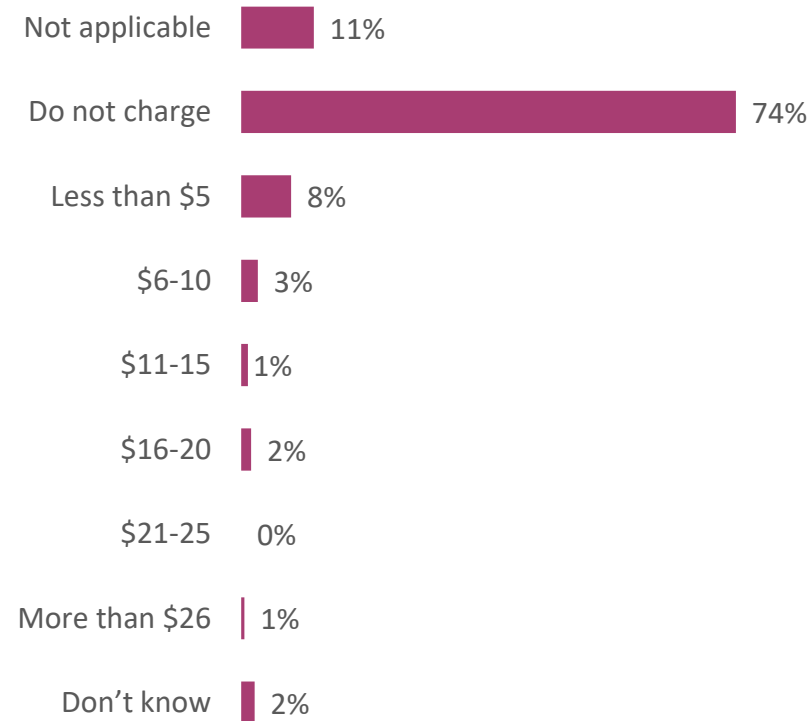
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PARKING

The majority of FECs offer free parking on site.

Regular Parking Prices



	Estimated Total Attendance in 2019				
	Less than 50,000	50,000-150,000	150,001-500,000	500,001-1 million	More than 1 million
Not applicable	15%	6%	9%	19%	10%
Do not charge	66%	83%	73%	75%	67%
Less than \$5	12%	6%	9%	0%	5%
\$6-10	2%	0%	3%	0%	10%
\$11-15	0%	2%	0%	6%	0%
\$16-20	2%	0%	3%	0%	5%
\$21-25	0%	0%	0%	0%	0%
More than \$26	2%	0%	0%	0%	0%
Don't know	2%	2%	3%	0%	5%
n	59	47	33	16	21
Average charge	\$8.70	\$7.00	\$8.20	\$13.00	\$9.75

Average charge = US\$8.50

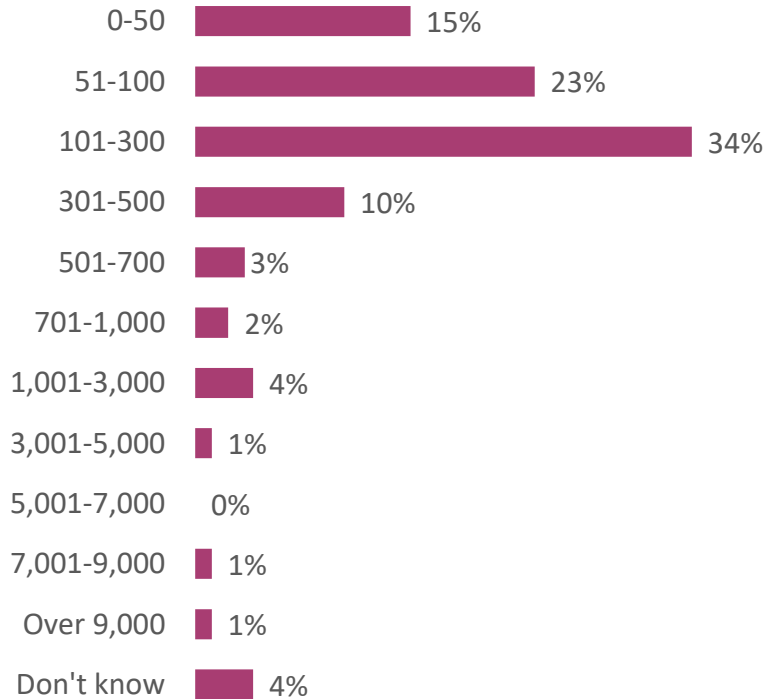
Assumes “not applicable” responses represent the percentage of FECs that do not offer parking

Q6.1. How much does the facility charge for regular parking (in US\$)? (n=201)

PARKING

FECs average 523 parking spaces, with higher trafficked destinations averaging over 1,000 parking spaces.

Number of Parking Spaces



Average no. of spaces = 523

Estimated Total Attendance in 2019				
Less than 50,000	50,000-150,000	150,001-500,000	500,001-1 million	More than 1 million
33%	9%	7%	0%	11%
24%	37%	28%	15%	0%
22%	42%	31%	38%	22%
8%	2%	17%	31%	17%
4%	0%	3%	0%	17%
0%	2%	3%	8%	0%
6%	2%	7%	0%	0%
0%	0%	0%	0%	11%
0%	0%	0%	0%	0%
0%	0%	0%	0%	11%
0%	0%	3%	8%	0%
2%	5%	0%	0%	11%
n=49	n=43	n=29	n=13	n=18
256	199	686	1,046	1,741

Q6.2 What was the estimated total number of parking spots at this facility in 2019? (n=201)

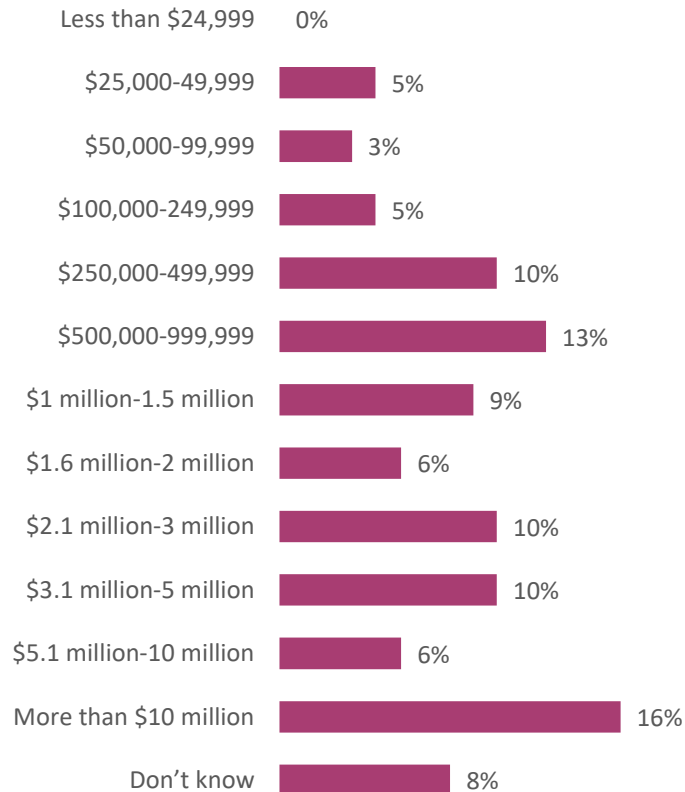
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FINANCIALS – CORPORATE FEC RESPONDENTS ONLY

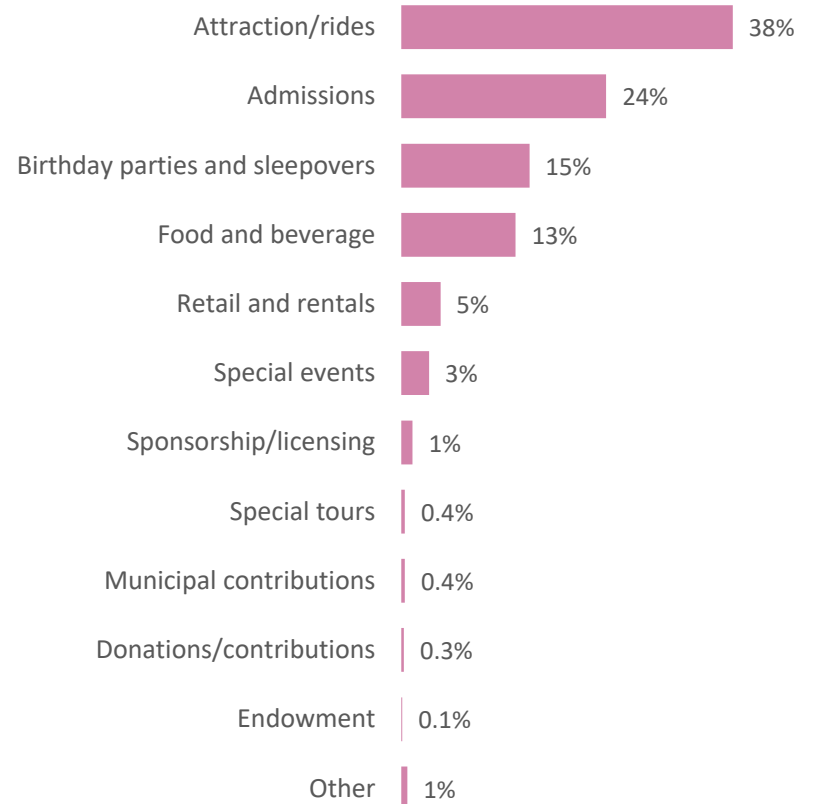
Corporate FECs reported an average revenue exceeding US\$3 million in 2019.

Estimated Total Gross Revenues in 2019



Average revenue = US\$3.32 million

Average % of Revenue Collected by Category in 2019



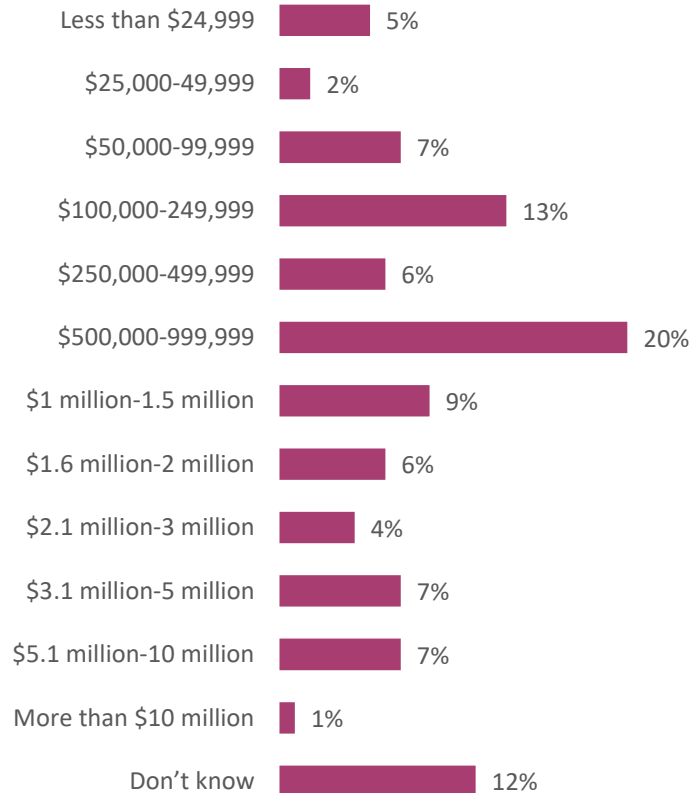
Q7.1 What were the estimated total gross revenues for the facility in 2019? (n=88)

Q7.3 Please indicate the percentage of revenue received in these categories for your facility. (n=57, remaining respondents of corporate FECs did not answer)

FINANCIALS – INDIVIDUAL LOCATION FEC RESPONDENTS ONLY

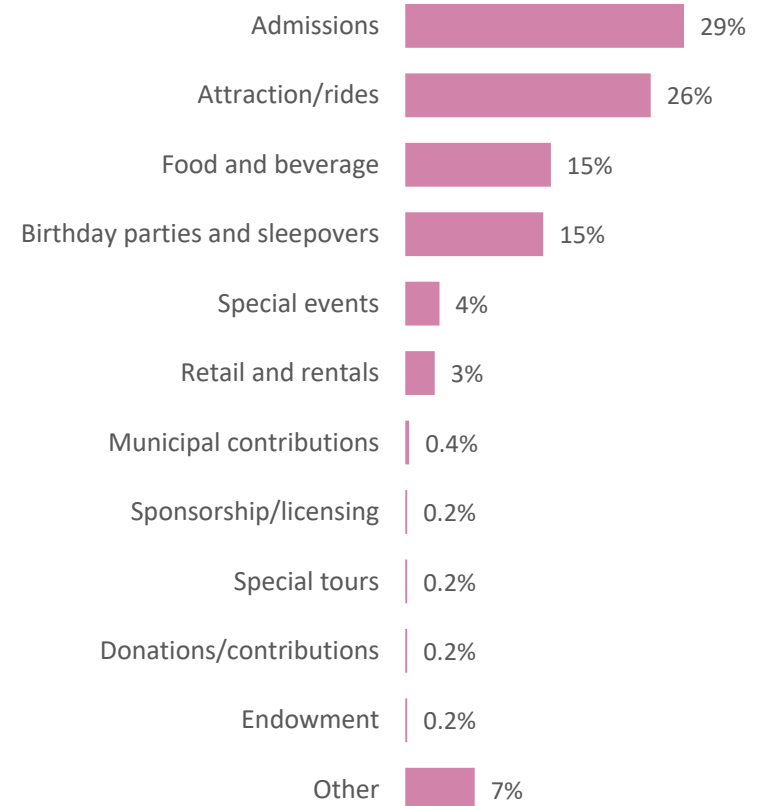
One-third of individual location FECs reported revenue exceeding US\$1 million in 2019.

Estimated Total Gross Revenues in 2019



Average revenue = US\$1.64 million

Average % of Revenue Collected by Category in 2019



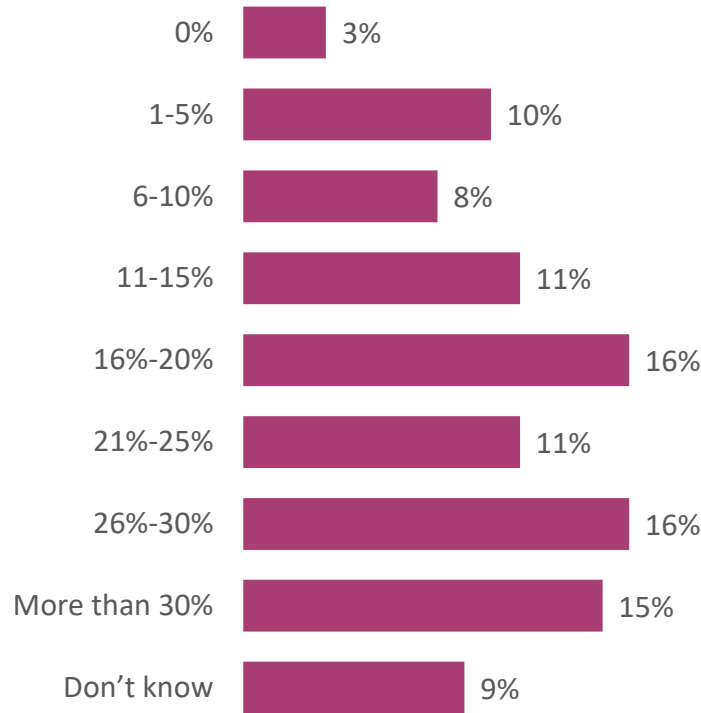
Q7.1 What were the estimated total gross revenues for the facility in 2019? (n=113)

Q7.3 Please indicate the percentage of revenue received in these categories for your facility. (n=63, remaining respondents of individual location FECs did not answer)

FINANCIALS – CORPORATE FEC RESPONDENTS ONLY

Corporate FECs claimed an average profit margin of 18.6 percent in 2019.

Estimated Profit in 2019



Average profit margin = **18.6%**

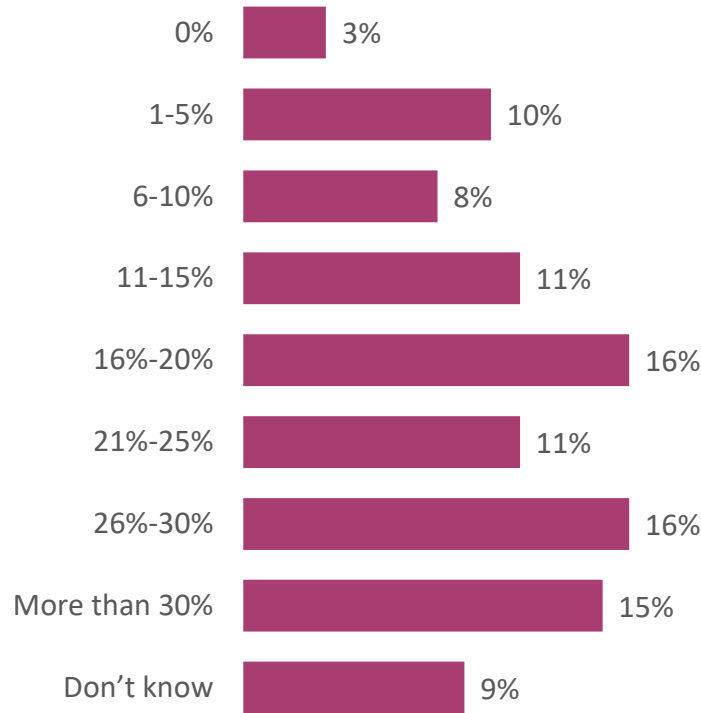
Estimated Total Attendance in 2019				
Less than 50,000	50,000-150,000	150,001-500,000	500,001-1 million	More than 1 million
19%	0%	0%	0%	0%
0%	5%	24%	10%	11%
19%	5%	0%	20%	6%
19%	19%	6%	10%	6%
13%	33%	18%	10%	0%
6%	5%	18%	0%	28%
13%	14%	6%	10%	33%
6%	14%	29%	40%	0%
6%	5%	0%	0%	17%
n=16	n=21	n=17	n=10	n=18
13.9%	19.5%	19.5%	20.2%	20.7%

Q7.2 What was the estimated profit for the facility operation in 2019 as a percentage of revenue? (n=88)

FINANCIALS – INDIVIDUAL LOCATION FEC RESPONDENTS ONLY

Individual location FECs claimed an average profit margin of 14.8 percent in 2019.

Estimated Profit in 2019



Average profit margin = **14.8%**

Estimated Total Attendance in 2019				
Less than 50,000	50,000-150,000	150,001-500,000	500,001-1 million	More than 1 million
12%	0%	0%	0%	0%
21%	4%	13%	0%	0%
19%	12%	13%	17%	0%
7%	23%	13%	33%	0%
7%	8%	13%	17%	33%
7%	12%	0%	0%	0%
7%	12%	6%	17%	0%
9%	4%	19%	17%	0%
12%	27%	25%	0%	67%
n=43	n=26	n=16	n=6	n=3
12.1%	17.1%	17.1%	18.5%	18.0%

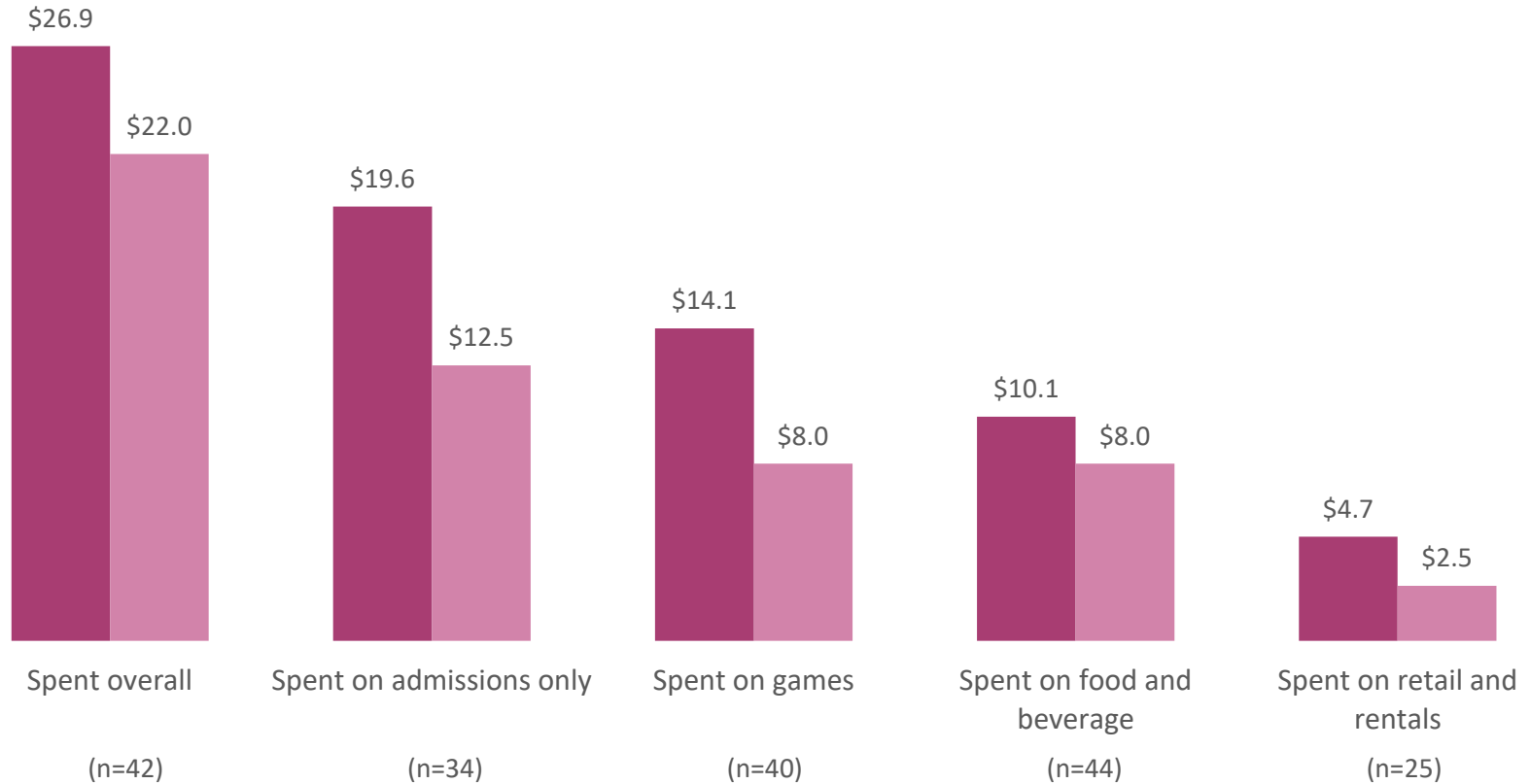
Q7.2 What was the estimated profit for the facility operation in 2019 as a percentage of revenue? (n=113)

FINANCIALS – CORPORATE FEC RESPONDENTS ONLY

Guests spent US\$27 on average at corporate FECs in 2019.

Per Capita Spend (US\$)

■ Average per capita spend ■ Median per capita spend



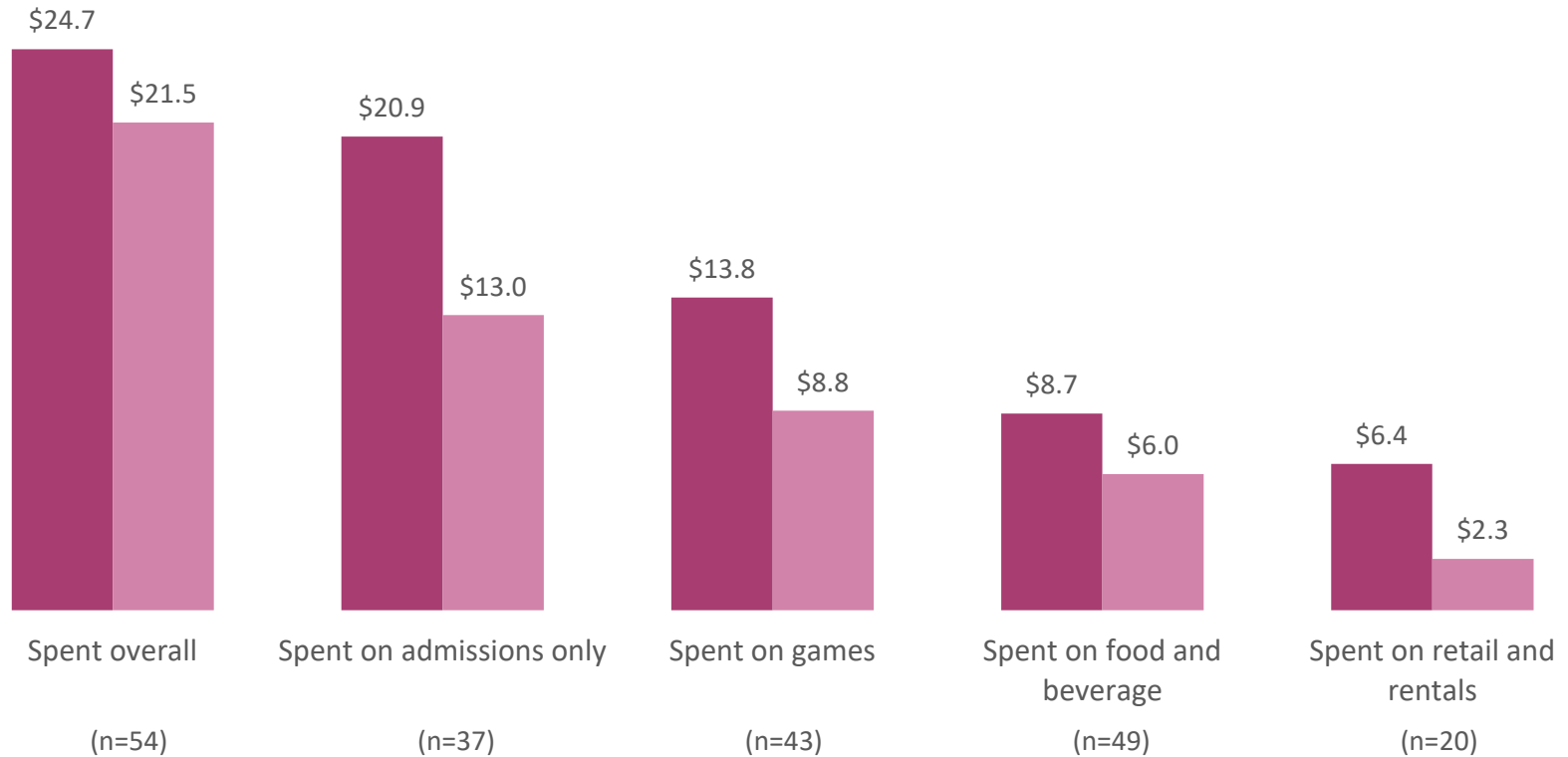
Q7.4 For 2019, please indicate in the chart below the estimated average spend per person in U.S. dollars for each category. (n=88)

FINANCIALS – INDIVIDUAL LOCATION FEC RESPONDENTS ONLY

Guests spent US\$25 on average at individual location FECs in 2019.

Per Capita Spend (US\$)

■ Average per capita spend ■ Median per capita spend



Q7.4 For 2019, please indicate in the chart below the estimated average spend per person in U.S. dollars for each category. (n=113)

FINANCIALS

Employee payroll and rent/mortgage remain the biggest expenses for FECs.

Percentage of Total Costs Spent by Category in 2019	Overall	Corporate	Individual
Employee-payroll	24%	24%	25%
Employee-benefits	3%	3%	2%
Employee-payroll taxes	6%	6%	6%
Employee-other, including deferred compensation and pension costs	1%	2%	1%
Rent/mortgage	14%	15%	12%
Education/training of employees	2%	2%	2%
Depreciation	4%	4%	5%
Maintenance (ride/equipment, grounds, tools, computers, etc.)	6%	6%	6%
Management (dues, office supplies, legal/accounting services etc.)	3%	3%	3%
Marketing (advertising/promotion, group sales expenses)	5%	3%	6%
Shows and entertainment expense (not including labor)	1%	1%	0%
Food and beverage expense (not including labor)	7%	6%	7%
Game and arcade expense (not including labor)	4%	3%	4%
Merchandise/retail expense (not including labor)	2%	2%	2%
Ride supplies expense	1%	1%	1%
Credit card fees	1%	1%	2%
Utilities (sewer, trash, fuel, telephone, etc.)	3%	3%	4%
Taxes and permits	3%	2%	3%
Insurance	3%	2%	3%
Outside contractors/service	1%	2%	1%
Rental expenses	3%	3%	2%
Miscellaneous expenses	5%	5%	5%

Q7.5 What percentage of annual gross revenue did the facility spend on each expense category in 2019? (n: overall=115, corporate=58, individual=57; remaining respondents did not answer)

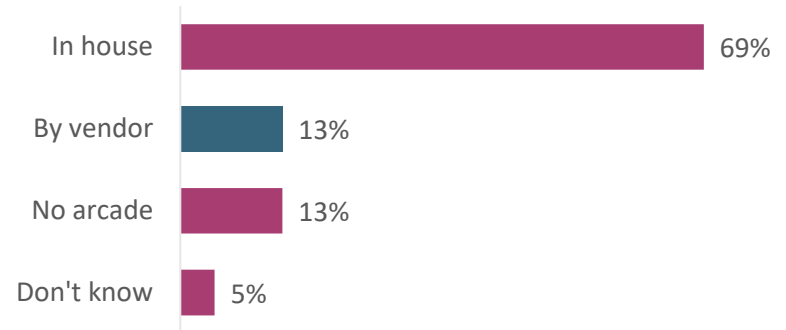
FINANCIALS

Arcade games account for more than 40 percent of the floorplan and are commonly managed in house by FECs.

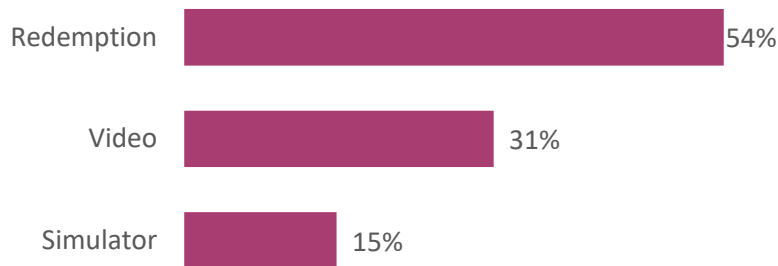
Average % of Square Footage Dedicated to Arcades

41%

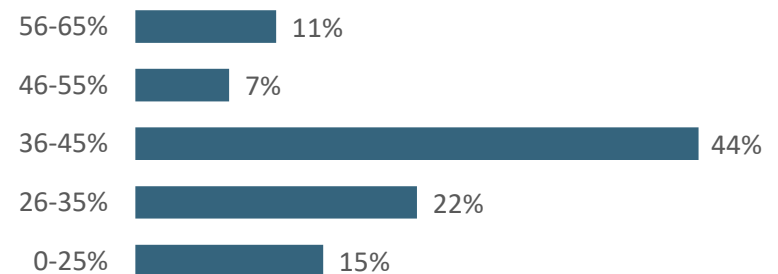
Arcade Program Management (% of responses)



Average % of Total Games Area by Type



Approximate Revenue Share (vendor managed)



Q7.7 What percentage (%) of your building's (front of house) square footage is dedicated to game space/arcades? (n=168)

Q7.8 Of your total games inventory, what percentage (out of 100 percent) represents redemption, simulator, and video? (n=135)

Q7.6 Is your arcade program managed in house or by a revenue share partner? (n=201)

Q7.9 What is your approximate revenue percentage share when the arcade program is managed by a vendor? (n=27)

- I. BACKGROUND
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 - PARKING
 - FINANCIALS
 - HUMAN RESOURCES**
 - ADDITIONAL INFO
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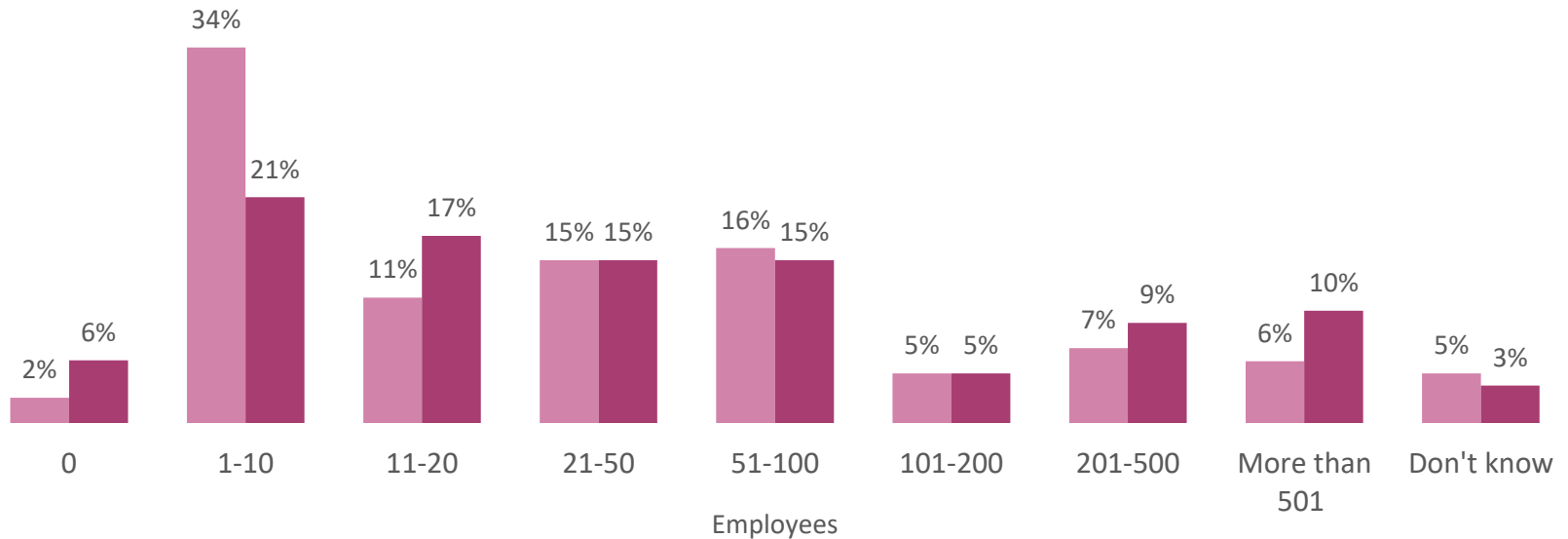


HUMAN RESOURCES – CORPORATE FEC RESPONDENTS ONLY

Most employees at corporate FECs work part time during peak seasons.

No. of Full Time and Part Time Employees (% of respondents)

■ Full time ■ Part time



55%

Overall employee retention rate at peak season.

- In 2019, corporate FECs employed, on average, 86 full time and 119 part time employees, during the peak season.

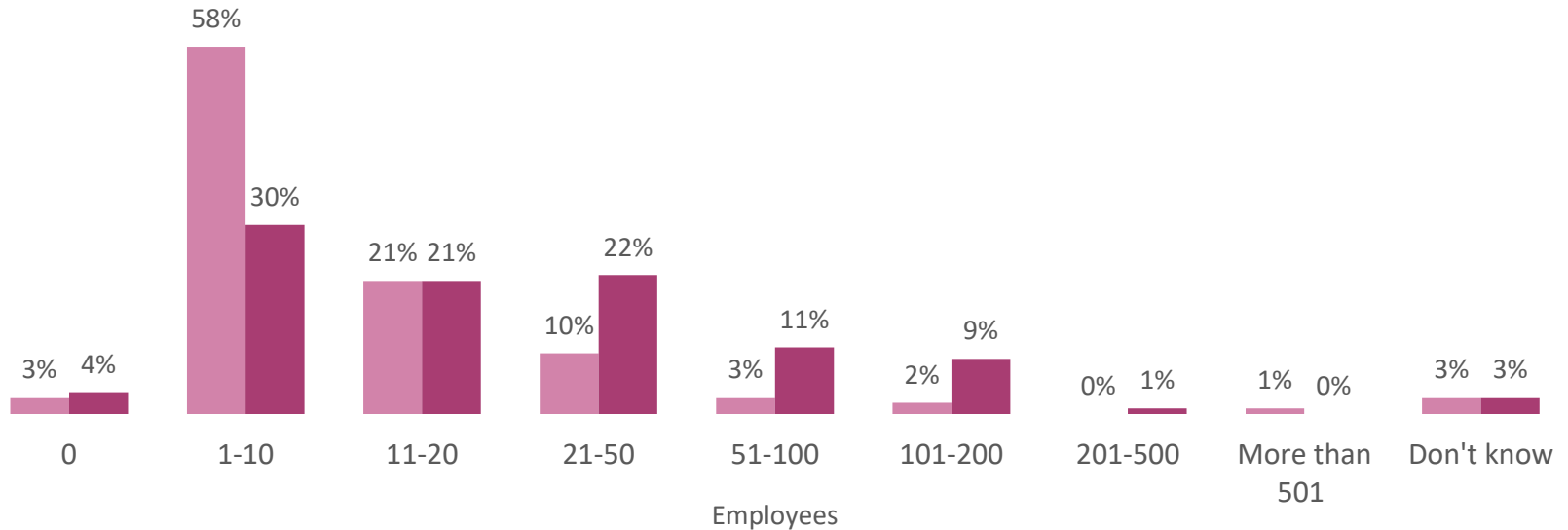
Q8.1 How many full-time and part-time employees do you have at the facility during peak season? (n=88)

HUMAN RESOURCES – INDIVIDUAL LOCATION FEC RESPONDENTS ONLY

Most employees at individual location FECs work part time during peak seasons.

No. of Full Time and Part Time Employees (% of respondents)

■ Full time ■ Part time



54%

Overall employee retention rate at peak season.

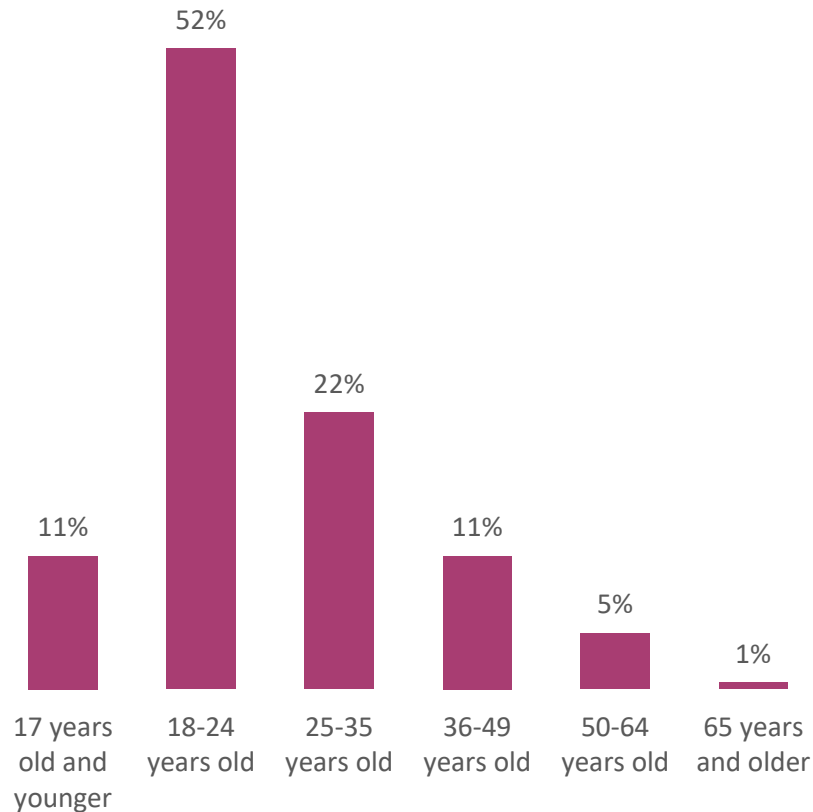
■ In 2019, individual location FECs employed, on average, 20 full time and 38 part time employees, during the peak season.

Q8.1 How many full-time and part-time employees do you have at the facility during peak season? (n=113)

HUMAN RESOURCES – CORPORATE FEC RESPONDENTS ONLY

More than 60 percent of corporate FEC staff are 24 years old or younger.

Employee Age Bracket (avg. %)



**26.7
years**

Average age of corporate FEC employees.

70%

of employees in North America are 24 years old or younger.

35%

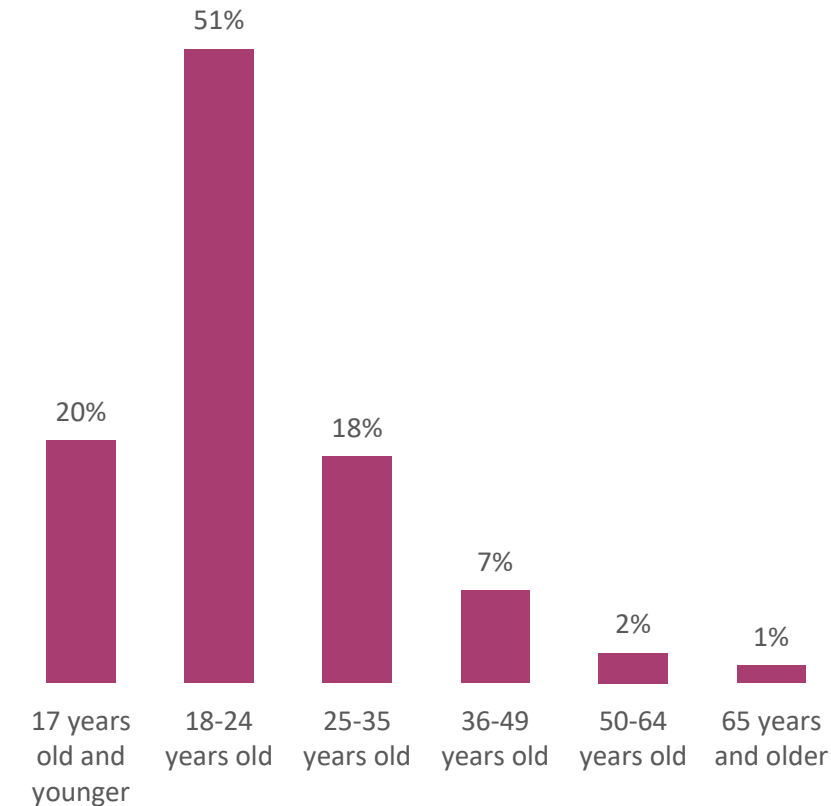
of employees in Europe/Middle East are aged 25-49 years old.

Q8.3 What percentage of your employees fall into each of the following age categories? (n=78, remaining 10 respondents of corporate FECs did not answer)

HUMAN RESOURCES – INDIVIDUAL LOCATION FEC RESPONDENTS ONLY

With 71 percent 24 years old or younger, individual location FEC staff are slightly younger than corporate FEC staff.

Employee Age Bracket (avg. %)



24.9 years

Average age of individual location FEC employees.

74%

of employees in North America are 24 years old or younger.

34%

of employees in Europe/Middle East are aged 25-49 years old.

Q8.3 What percentage of your employees fall into each of the following age categories? (n=95, remaining 13 respondents of individual location FECs did not answer)

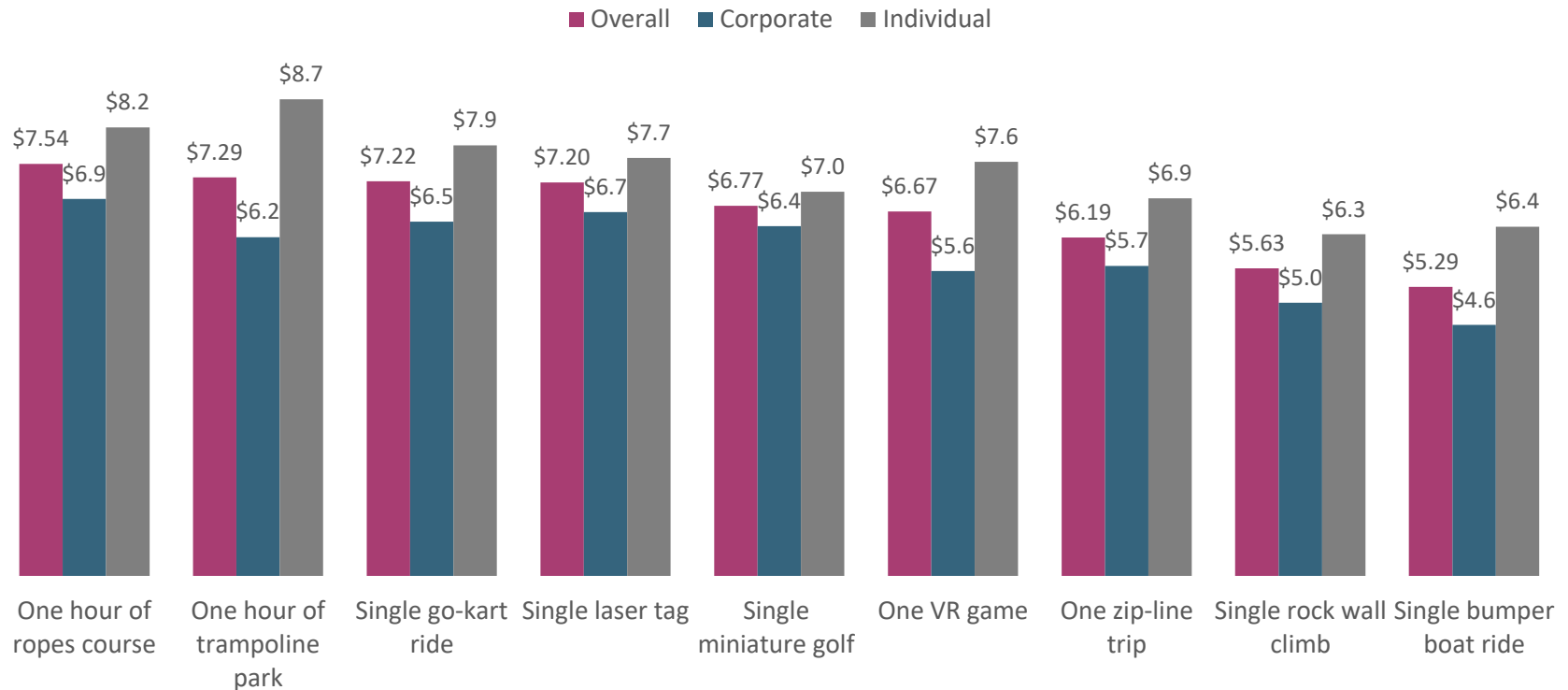
- I. BACKGROUND
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ADDITIONAL INFO

Standard charges for attractions range from \$5 to \$8 for FECs; price range is higher at individual location FECs compared to corporate ones.

Average Standard Charges in US\$



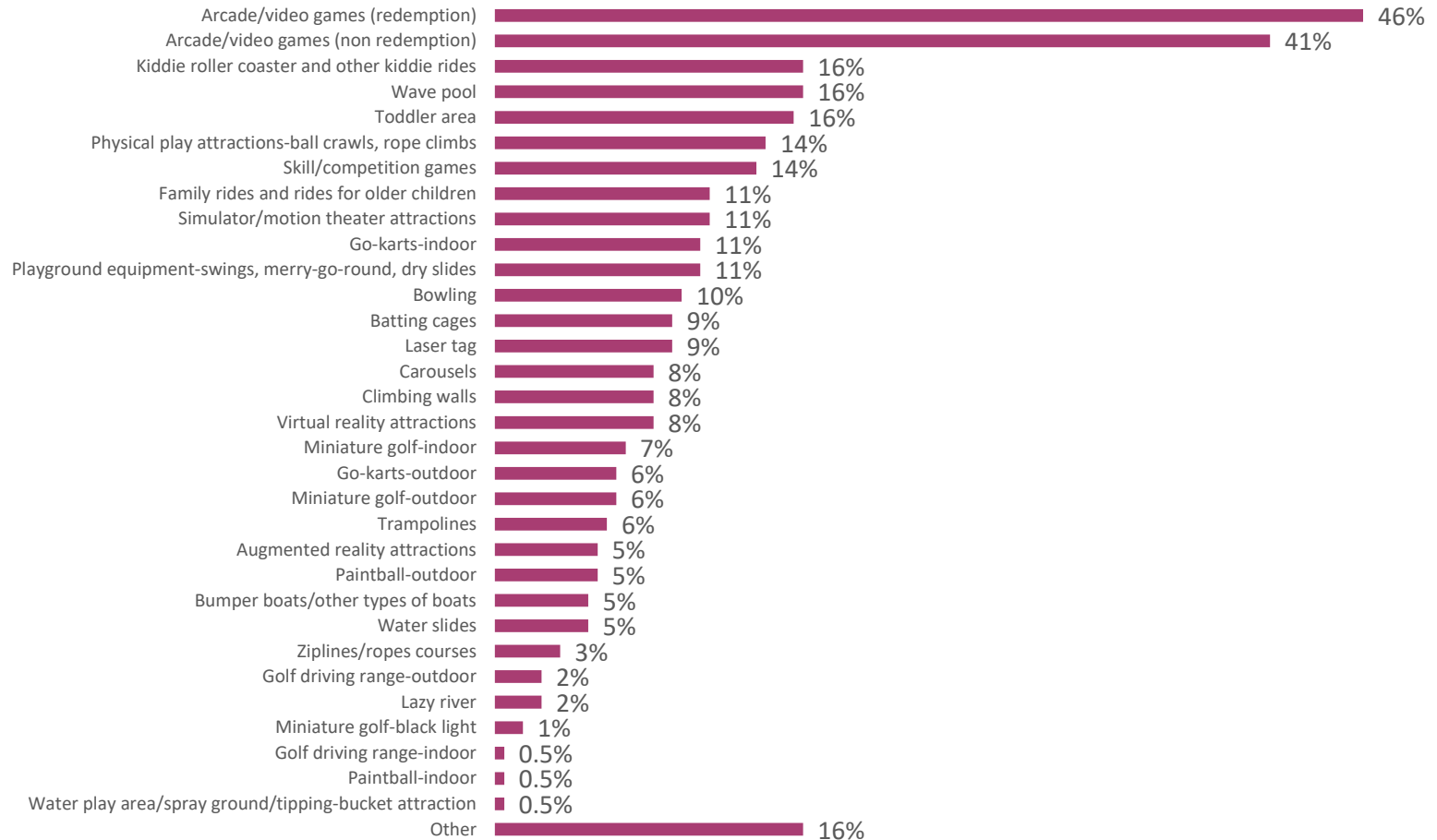
- Standard charges are consistently higher in North America than in other regions.
- The highest charge across all attractions was an hour of ropes course and trampoline play in North America (US\$9.28 and US\$9.20 respectively).

Q9.1 What is your standard charge in U.S. dollars for each of the following attractions? Please select all that apply.
(n: overall=201, corporate=88, individual=113)

ADDITIONAL INFO

Arcade video games represent top revenue sources for FECs.

Top 5 Revenue Source (% of responses)

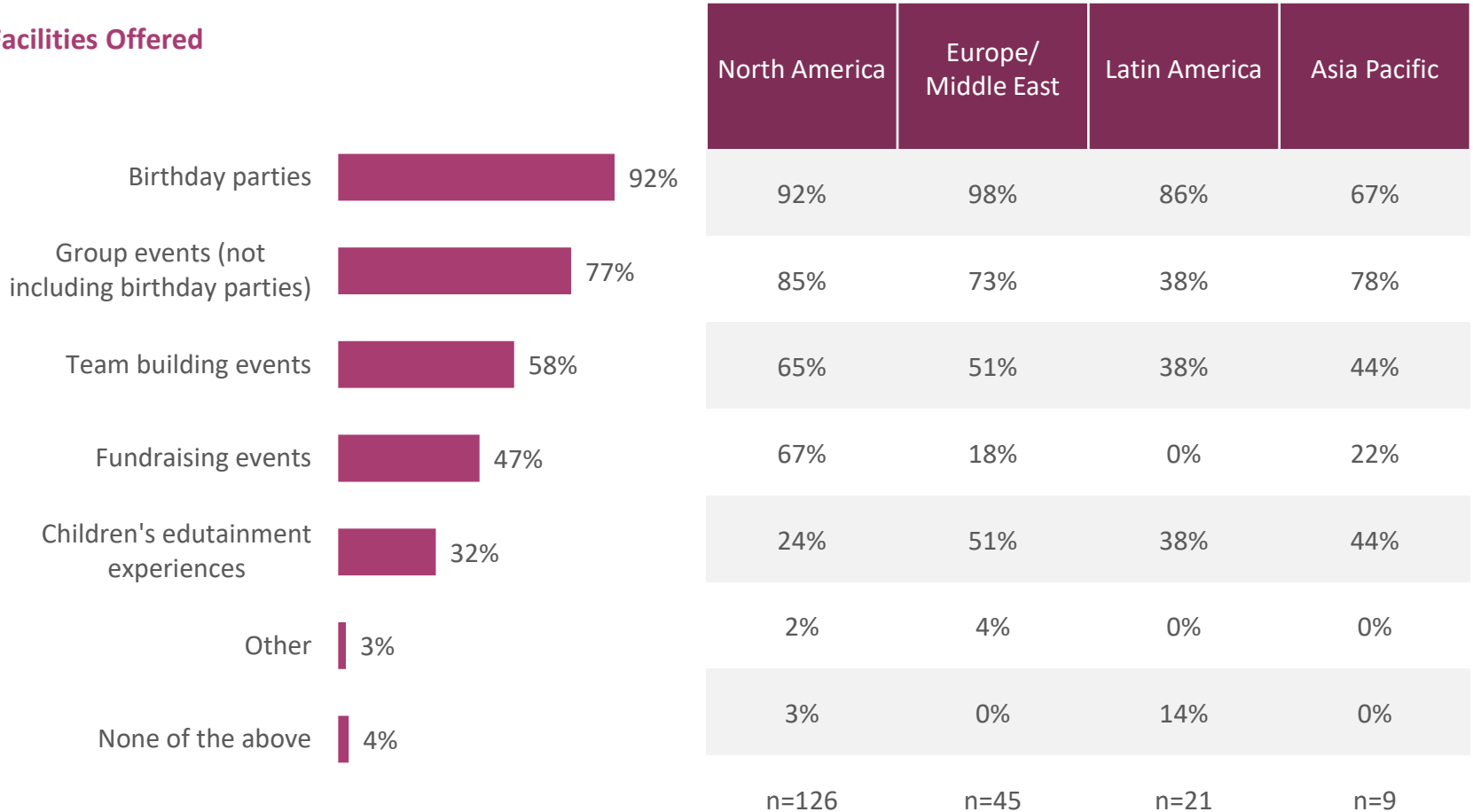


Q9.2 Please rank your top five revenue sources from these attractions, no. 1 for the highest source through no. 5 as the lowest source. You may choose only one source for each number. Skip this question if you don't know. (n=201)

ADDITIONAL INFO

Most FECs offer birthday parties and other group events.

Facilities Offered



Q9.3 Which of these experiences do you currently offer at your facilities? (Check all that apply.) (n=201)

- I. BACKGROUND
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APPENDIX 1.1

Number of Locations

Number of Locations	North America		Europe/ Middle East		Latin America		Asia Pacific		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%
One	78	62%	17	38%	3	14%	5	56%	70	51%	23	51%
Two	14	11%	5	11%	2	10%	0	0%	15	11%	5	11%
Three	8	6%	4	9%	0	0%	0	0%	7	5%	4	9%
Four to five	7	6%	3	7%	4	19%	2	22%	10	7%	4	9%
Six to seven	4	3%	4	9%	2	10%	0	0%	7	5%	2	4%
Eight to nine	3	2%	1	2%	2	10%	0	0%	4	3%	1	2%
10 or more	12	10%	11	24%	8	38%	2	22%	25	18%	6	13%
Total	126	100%	45	100%	21	100%	9	100%	138	100%	45	100%
Average	2.7 locations		4.6 locations		6.8 locations		4.0 locations		3.8 locations		3.3 locations	

Q2.2 How many locations does your company own or operate in total, including the facility you are reporting on for this survey?

APPENDIX 1.2

Facility Area

Facility Area	North America		Europe/ Middle East		Latin America		Asia Pacific		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%
Up to 5,000 sq. ft.	11	9%	7	16%	4	19%	1	11%	16	12%	4	9%
5,001-10,000 sq. ft.	13	10%	8	18%	9	43%	2	22%	23	17%	8	18%
10,001-20,000 sq. ft.	20	16%	9	20%	3	14%	4	44%	34	25%	2	4%
20,001-40,000 sq. ft.	24	19%	12	27%	3	14%	0	0%	33	24%	5	11%
1-5 acres	22	18%	3	7%	2	10%	1	11%	18	13%	7	16%
6-10 acres	18	14%	1	2%	0	0%	1	11%	6	4%	10	22%
11-15 acres	4	3%	1	2%	0	0%	0	0%	2	1%	2	4%
16-20 acres	4	3%	2	4%	0	0%	0	0%	1	1%	3	7%
21-25 acres	1	1%	0	0%	0	0%	0	0%	0	0%	0	0%
26-30 acres	2	2%	0	0%	0	0%	0	0%	0	0%	1	2%
Over 30 acres	1	1%	1	2%	0	0%	0	0%	0	0%	2	4%
Don't know	6	5%	1	2%	0	0%	0	0%	5	4%	1	2%
Total	126	100%	45	100%	21	100%	9	100%	138	100%	45	100%
Average	3.9 acres		2.5 acres		0.5 acres		1.4 acres		1.4 acres		6.3 acres	

Q2.4 How large is the FEC being reported on for this survey (total sq. ft./acreage, including dedicated guest parking and behind-the-scenes areas)? Please select the most accurate size.

APPENDIX 1.3

No. of Days Operated

No. of Days Operated (2019)	North America		Europe/Middle East		Latin America		Asia Pacific		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%
Less than 90	6	5%	1	2%	0	0%	2	22%	6	4%	1	2%
91-120	5	4%	2	4%	0	0%	0	0%	1	1%	2	4%
121-150	2	2%	2	4%	2	10%	0	0%	1	1%	3	7%
151-180	5	4%	1	2%	0	0%	0	0%	3	2%	1	2%
181-210	5	4%	4	9%	1	5%	0	0%	7	5%	2	4%
211-364	57	45%	10	22%	2	10%	4	44%	58	42%	12	27%
All year long	46	37%	25	56%	16	76%	3	33%	62	45%	24	53%
Total	126	100%	45	100%	21	100%	9	100%	138	100%	45	100%
<i>Average</i>	<i>288 days</i>		<i>300 days</i>		<i>328 days</i>		<i>269 days</i>		<i>304 days</i>		<i>299 days</i>	

Q2.5 Approximately how many days was the facility open to the public in 2019? (Covers both public or private events or full or partial days.)

APPENDIX 1.4

Estimated Total Attendance

Estimated Total Attendance (2019)	Less than 50,000	50,000-150,000	150,001-500,000	500,001-1 million	More than 1 million	Attendance
	n=	n=	n=	n=	n=	Avg.
Region						
• North America	34	31	19	10	9	288,592
• Europe/Middle East	16	9	8	4	7	364,773
• Latin America	7	5	3	2	4	396,429
• Asia Pacific	2	2	3	0	1	315,625
Type of Park						
• Indoor-only	39	33	18	11	18	351,681
• Both indoor/outdoor	12	10	12	5	3	309,524
Days Operated in 2019						
• Less than 90	8	0	0	0	0	50,000
• 91-120	6	1	0	0	0	57,143
• 121-150	2	1	1	0	0	131,250
• 151-180	3	1	0	0	0	62,500
• 181-210	3	3	1	0	2	363,889
• 211-364	20	16	12	4	8	325,000
• All year long	17	25	19	12	11	384,226

Q2.6 What was the estimated total attendance for this facility in 2019?

APPENDIX 2.1

Admission Structure

Admission Structure	Admission Pricing Policy			Average One-Day, General Admission Ticket Price (US\$)	Average Cost per Attraction (US\$)
	Pay-One-Price (n=)	Pay-as-You-Go (n=)	Combination (n=)		
Overall	38	91	67	\$19.41	\$12.46
Region					
• North America	27	53	44	\$21.56	\$14.68
• Europe/Middle East	7	20	15	\$14.14	\$8.86
• Latin America	2	16	3	\$9.50	\$7.53
• Asia Pacific	2	2	5	\$21.21	\$13.14
Type of Park					
• Both indoor/outdoor	5	19	21	\$20.12	\$12.88
• Indoor-only	28	66	40	\$16.97	\$12.10
Estimated Total Attendance in 2019					
• 0-50,000	19	25	14	\$17.03	\$10.92
• 50,001-150,000	8	22	16	\$19.67	\$13.05
• 150,001-500,000	6	11	15	\$18.36	\$11.69
• 500,001-1 million	1	10	5	\$27.17	\$13.80
• More than 1 million	2	12	6	\$20.50	\$12.33

Q3.1 What statement below best describes the admission pricing policy at the facility?

Q2.6 What was the estimated total attendance for the facility in 2019?

APPENDIX 2.2

Admission Category

Admission Category of Total Attendance (2019)	North America	Europe/ Middle East	Latin America	Asia Pacific
	Avg.	Avg.	Avg.	Avg.
General admission	51%	51%	41%	40%
Birthday package	22%	17%	22%	8%
Complimentary	2%	3%	4%	5%
Corporate/team-building group sales	6%	8%	6%	11%
Education program	1%	2%	1%	18%
Hotel/resort	2%	2%	1%	0%
Multi-day	1%	2%	1%	0%
Other group sales (church, school, military, scouts, etc.)	5%	5%	2%	5%
Special events	3%	3%	3%	4%
Promotions (discounted admissions)	3%	3%	8%	9%
Season-pass	1%	1%	6%	1%
Other	3%	1%	6%	0%
Total	n=82	n=36	n=16	n=6

Q3.4 Of the facility's total attendance in 2019, approximately what percentages fell into the following categories?

APPENDIX 3.1

Attractions

Attractions	North America		Europe/ Middle East		Latin America		Asia Pacific	
	n=	%	n=	%	n=	%	n=	%
Arcade/video games (non redemption)	93	74%	23	51%	14	67%	3	33%
Arcade/video games (redemption)	87	69%	19	42%	13	62%	3	33%
Augmented reality attractions	17	14%	10	22%	6	29%	2	22%
Batting cages	18	14%	1	2%	0	0%	0	0%
Bowling	38	30%	12	27%	4	19%	1	11%
Bumper boats/other types of boats	20	16%	11	24%	4	19%	1	11%
Carousels	14	11%	12	27%	9	43%	1	11%
Climbing walls	33	26%	18	40%	5	24%	6	67%
Family rides and rides for older children	22	18%	13	29%	11	52%	3	33%
Go-karts-indoor	14	11%	9	20%	3	14%	1	11%
Go-karts-outdoor	31	25%	5	11%	3	14%	1	11%
Golf driving range-indoor	1	1%	0	0%	0	0%	1	11%
Golf driving range-outdoor	3	2%	0	0%	0	0%	0	0%
Kiddie roller-coaster and other kiddie rides	17	14%	9	20%	4	19%	1	11%
Laser-tag	54	43%	16	36%	1	5%	3	33%
Lazy river	2	2%	1	2%	0	0%	0	0%
Miniature-golf-indoor	13	10%	2	4%	1	5%	0	0%
Miniature-golf-outdoor	38	30%	3	7%	0	0%	1	11%
Miniature-golf-black light	8	6%	1	2%	0	0%	0	0%
Paintball-indoor	1	1%	2	4%	0	0%	0	0%
Paintball- outdoor	1	1%	2	4%	0	0%	1	11%

Q4.1 What attractions do you currently have at the facility? Please select all that apply.

APPENDIX 3.1

Attractions (cont'd)

Attractions	North America		Europe/ Middle East		Latin America		Asia Pacific	
	n=	%	n=	%	n=	%	n=	%
Physical play attractions-ball crawls, rope climbs	31	25%	13	29%	10	48%	2	22%
Playground equipment-swings, merry-go-round, dry slides	23	18%	22	49%	5	24%	3	33%
Simulator/motion theater attractions	22	18%	15	33%	9	43%	2	22%
Skill/competition games	29	23%	17	38%	10	48%	3	33%
Toddler area	29	23%	21	47%	10	48%	3	33%
Trampolines	15	12%	29	64%	9	43%	5	56%
Virtual reality attractions	52	41%	14	31%	8	38%	4	44%
Water play area/spray ground/tipping- bucket attraction	3	2%	5	11%	1	5%	2	22%
Water slides	6	5%	3	7%	0	0%	1	11%
Wave pool	2	2%	0	0%	0	0%	0	0%
Ziplines/ropes courses	18	14%	5	11%	2	10%	1	11%
Other	51	41%	11	24%	3	14%	2	22%

Q4.1 What attractions do you currently have at the facility? Please select all that apply.

APPENDIX 4.1

Guest Profile (visits)

Guest Profile	Overall		North America		Europe/ Middle East		Latin America		Asia Pacific		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%
Distance Traveled to Visit Facility														
• 0-5 miles	49	36%	24	29%	16	42%	8	54%	2	44%	34	37%	11	32%
• 6-10 miles	34	25%	21	26%	9	24%	4	26%	1	23%	25	27%	8	24%
• 11-25 miles	26	19%	16	20%	7	19%	1	9%	1	29%	18	20%	5	16%
• 26-50 miles	13	10%	10	12%	3	8%	1	6%	0	5%	8	8%	4	12%
• 51-100 miles	6	4%	4	5%	2	4%	0	2%	0	0%	3	4%	1	4%
• 101-150 miles	4	3%	2	3%	1	3%	0	3%	0	0%	1	1%	2	7%
• 151-200 miles	3	3%	3	4%	0	0%	0	1%	0	0%	3	3%	1	2%
• Over 200 miles	2	2%	2	2%	0	1%	0	0%	0	0%	1	1%	1	3%
Total	137	100%	81	100%	38	100%	14	100%	4	100%	93	100%	34	100%
Average Distance	23.9 miles		29.0 miles		18.4 miles		13.8 miles		10.0 miles		21.0 miles		31.5 miles	
Average Length of Stay per Visit														
• Up to 1 hour	10	5%	2	2%	1	2%	6	29%	1	11%	6	4%	2	4%
• 1-2 hours	102	51%	60	48%	26	58%	12	57%	4	44%	74	54%	24	53%
• 3-4 hours	72	36%	50	40%	16	36%	3	14%	3	33%	51	37%	15	33%
• 5-6 hours	8	4%	7	6%	1	2%	0	0%	0	0%	3	2%	1	2%
• 7-8 hours	2	1%	0	0%	1	2%	0	0%	1	11%	1	1%	1	2%
• 9-10 hours	1	1%	1	1%	0	0%	0	0%	0	0%	1	1%	0	0%
• Don't know	6	3%	6	5%	0	0%	0	0%	0	0%	2	1%	2	4%
Total	201	100%	126	100%	45	100%	21	100%	9	100%	138	100%	45	100%
Average Visit	2.5 hours		2.6 hours		2.4 hours		1.5 hours		2.7 hours		2.4 hours		2.4 hours	

Q5.1 How far do your guests typically travel to visit the facility?

Q5.2 Approximately how many hours do your guests spend at the facility (average length of stay) each time they visit?

APPENDIX 4.2

Guest Profile (visit frequency)

Guest Profile	Overall		North America		Europe/ Middle East		Latin America		Asia Pacific		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	avg.	n=	avg.	n=	avg.	n=	avg.	n=	avg.	n=	avg.	n=	avg.
Visit Frequency (guests)														
• Once a year	35	31%	19	33%	11	33%	2	13%	4	50%	21	30%	10	32%
• Twice a year	22	19%	12	21%	7	21%	1	10%	2	23%	14	19%	6	22%
• Three times a year	16	15%	8	14%	6	18%	2	12%	1	8%	10	13%	6	19%
• Four times a year	14	13%	6	10%	3	11%	5	31%	0	5%	9	13%	4	13%
• Five or more times	24	22%	12	22%	6	18%	5	35%	1	14%	18	25%	4	14%
Total	111	100%	57	100%	32	100%	15	100%	7	100%	72	100%	30	100%
Average Visits/Year	2.7 visits		2.7 visits		2.6 visits		3.7 visits		2.1 visits		2.8 visits		2.6 visits	
Visit Frequency (season-pass holders)														
• Once a year	12	19%	5	15%	5	29%	1	21%	1	11%	6	16%	5	27%
• Twice a year	7	11%	2	8%	2	11%	1	11%	2	33%	4	10%	2	14%
• Three times a year	10	16%	4	14%	3	17%	2	30%	0	6%	4	10%	4	26%
• Four times a year	8	13%	4	13%	2	13%	1	17%	0	5%	6	15%	2	10%
• Five or more times	26	41%	16	51%	6	31%	1	21%	3	45%	20	50%	4	23%
Total	63	100%	32	100%	18	100%	7	100%	6	100%	41	100%	17	100%
Average Visits/Year	3.5 visits		3.8 visits		3.1 visits		3.1 visits		3.4 visits		3.7 visits		2.9 visits	

Q5.3 How often do guests visit the facility? Please indicate the estimated share of guests by visit frequency as a percentage.

APPENDIX 4.3

Guest Profile (visit frequency, age)

Visit Frequency vs. Est. Attendance in 2019	Less than 50,000		50,001-150,000		150,001-500,000		500,001-1 million		More than 1 million					
	n=	avg.	n=	avg.	n=	avg.	n=	avg.	n=	avg.				
Guests														
• Once a year	11	34%	9	31%	6	33%	3	28%	3	20%				
• Twice a year	5	16%	5	18%	4	22%	2	23%	4	26%				
• Three times a year	4	12%	3	12%	3	20%	1	14%	3	20%				
• Four times a year	4	14%	4	14%	1	8%	2	14%	2	16%				
• Five or more times	8	24%	7	25%	3	17%	2	21%	3	19%				
Total	32	100%	28	100%	17	100%	11	100%	14	100%				
Average Visits/Year	2.8 visits		2.9 visits		2.5 visits		2.8 visits		2.9 visits					
Guests by Age Bracket	Overall		North America		Europe/Middle East		Latin America		Asia Pacific		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	avg.	n=	avg.	n=	avg.	n=	avg.	n=	avg.	n=	avg.	n=	avg.
0-2 years old	6	5%	3	4%	2	5%	1	7%	0	2%	5	5%	1	3%
3-11 years old	44	33%	22	30%	15	38%	6	34%	2	23%	34	36%	9	28%
12-17 years old	28	21%	15	21%	7	19%	4	21%	2	30%	20	21%	7	21%
18-24 years old	20	15%	12	16%	5	12%	2	14%	1	19%	12	13%	6	19%
25-35 years old	18	13%	10	14%	5	12%	2	12%	1	13%	11	12%	4	15%
36-49 years old	12	9%	6	9%	3	9%	2	10%	1	10%	8	8%	3	10%
50-64 years old	5	4%	4	5%	1	3%	0	2%	0	3%	4	4%	1	3%
65 years or older	2	1%	1	2%	1	1%	0	1%	0	1%	1	2%	0	1%
Total	136	100%	74	100%	38	100%	17	100%	7	100%	96	100%	31	100%
Average Age	19.3 years		20.1 years		18.3 years		18.0 years		20.5 years		18.6 years		20.2 years	

Q5.3 How often do guests visit the facility? Please indicate the estimated share of guests by visit frequency as a percentage.

Q5.4 Approximately what percentage of your guests falls into the following age categories?

APPENDIX 5.1

Parking Fees

Regular Parking Fees (in U.S. dollars)	North America		Europe/ Middle East		Latin America		Asia Pacific	
	n=	%	n=	%	n=	%	n=	%
Do not charge	105	83%	34	76%	9	43%	1	11%
Less than \$5	5	4%	1	2%	4	19%	5	56%
\$6-10	2	2%	1	2%	1	5%	1	11%
\$11-15	1	1%	1	2%	0	0%	0	0%
\$16-20	1	1%	2	4%	0	0%	0	0%
\$21-25	0	0%	0	0%	0	0%	0	0%
More than \$26	1	1%	0	0%	0	0%	0	0%
Don't know	1	1%	0	0%	3	14%	0	0%
Not applicable	10	8%	6	13%	4	19%	2	22%
Total	126	100%	45	100%	21	100%	9	100%
<i>Average charges (US\$)</i>	\$9.80		\$12.40		\$5.60		\$5.50	

Q6.1 How much does the facility charge for regular parking (in U.S. dollars)?

APPENDIX 6.1

Estimated Gross Revenues

Estimated Total Gross Revenues in 2019	Overall		North America		Europe/ Middle East		Latin America		Asia Pacific	
	n=	%	n=	%	n=	%	n=	%	n=	%
Less than \$24,999	6	3%	4	3%	1	2%	0	0%	1	11%
\$25,000-49,999	6	3%	1	1%	3	7%	2	10%	0	0%
\$50,000-99,999	11	6%	5	4%	2	4%	3	14%	1	11%
\$100,000-249,999	19	10%	12	10%	5	11%	2	10%	0	0%
\$250,000-499,999	16	8%	5	4%	9	20%	1	5%	1	11%
\$500,000-999,999	34	17%	22	18%	9	20%	3	14%	0	0%
\$1 million-1.5 million	18	9%	12	10%	4	9%	1	5%	1	11%
\$1.6 million-2 million	12	6%	9	7%	1	2%	1	5%	1	11%
\$2.1 million-3 million	14	7%	9	7%	2	4%	2	10%	1	11%
\$3.1 million-5 million	17	9%	12	10%	3	7%	1	5%	1	11%
\$5.1 million-10 million	13	7%	10	8%	3	7%	0	0%	0	0%
More than \$10 million	15	8%	10	8%	1	2%	4	19%	0	0%
Don't know	20	10%	15	12%	2	4%	1	5%	2	22%
Total	201	100%	126	100%	45	100%	21	100%	9	100%
<i>Average revenue (US\$)</i>	<i>\$2.4 million</i>		<i>\$2.7 million</i>		<i>\$1.6 million</i>		<i>\$2.8 million</i>		<i>\$1.5 million</i>	

Q7.1 What were the estimated earned revenues for your FEC operation in 2019 (in U.S. dollars)?

APPENDIX 6.2

Estimated Margins and Revenue

Percentage of Revenue	Total		North America		Europe/Middle East		Latin America		Asia Pacific		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%
Estimated Profit Margin in 2019 (% of revenue)														
• 0%	8	4%	4	3%	3	7%	0	0%	1	11%	7	5%	0	0%
• 1-5%	21	10%	11	9%	8	18%	1	5%	1	11%	16	12%	3	7%
• 6-10%	25	12%	17	14%	4	9%	4	19%	0	0%	15	11%	9	20%
• 11-15%	23	11%	15	12%	4	9%	4	19%	0	0%	14	10%	7	16%
• 16-20%	25	12%	15	12%	6	13%	3	14%	1	11%	18	13%	4	9%
• 21-25%	17	9%	8	6%	7	16%	2	10%	0	0%	11	8%	5	11%
• 26-30%	23	11%	11	9%	3	7%	7	33%	2	22%	17	12%	5	11%
• More than 30%	22	11%	12	10%	8	18%	0	0%	2	22%	14	10%	6	13%
• Don't know	37	18%	33	26%	2	4%	0	0%	2	22%	26	19%	6	13%
Total	201	100%	126	100%	45	100%	21	100%	9	100%	138	100%	45	100%
Average Profit (%)	16.6%		16.1%		16.5%		18.2%		19.9%		16.4%		17.6%	
Average Percentage of Revenue Collected From Different Categories in 2019														
• Attractions/rides	32%		30%		27%		59%		10%		27%		45%	
• Admission	27%		26%		30%		10%		56%		30%		18%	
• Food and beverage	14%		15%		17%		10%		2%		14%		16%	
• Birthday parties	15%		16%		13%		15%		2%		17%		9%	
• Retail and rentals	4%		4%		4%		3%		7%		4%		3%	
• Special events	3%		3%		3%		1%		17%		3%		3%	
• Other	5%		6%		6%		2%		6%		5%		6%	
Total	n=120		n=66		n=35		n=14		n=5		n=83		n=29	

Q7.2 What was the estimated profit for the facility in 2019 as a percentage of revenue?

Q7.3 Please indicate the percentage of revenue received in these categories for your FEC.

APPENDIX 6.3

Average Spend per Capita

Estimated Average Spend per Capita in U.S. dollars (2019)	Overall		North America		Europe/ Middle East		Latin America		Asia Pacific	
	Median	Avg.	Median	Avg.	Median	Avg.	Median	Avg.	Median	Avg.
Spend overall (n=96)	\$21.5	\$25.7	\$23.5	\$27.6	\$20.0	\$20.7	\$11.2	\$15.3	\$52.0	\$54.8
Spend on admissions only (n=71)	\$12.9	\$20.3	\$14.3	\$25.5	\$12.0	\$13.4	\$6.1	\$8.8	\$25.0	\$24.0
Spend on food and beverage (n=93)	\$7.0	\$9.4	\$9.0	\$10.1	\$5.5	\$6.8	\$5.0	\$6.1	\$18.5	\$20.8
Spend on retail and rentals (n=45)	\$2.5	\$5.5	\$2.0	\$6.0	\$2.2	\$3.5	\$2.0	\$3.3	\$12.5	\$11.8
Spend on games (n=83)	\$10.0	\$13.9	\$10.0	\$16.5	\$5.0	\$7.1	\$10.0	\$13.8	\$6.5	\$11.0

Q7.4 For 2019, please indicate the estimated average spend per person (per capita) in U.S. dollars for each category listed below.

APPENDIX 6.4

Estimated Costs (by category)

Percentage of Total Costs Spent by Category in 2019	North America	Europe/ Middle East	Latin America	Asia Pacific
Employee-payroll	26%	23%	16%	26%
Employee-benefits	2%	2%	5%	3%
Employee-payroll taxes	6%	8%	4%	5%
Employee-other, including deferred compensation and pension costs	1%	2%	4%	1%
Rent/mortgage	14%	16%	11%	6%
Education/training of employees	2%	3%	2%	3%
Depreciation	4%	3%	5%	7%
Maintenance (ride/equipment, grounds, tools, computers, etc.)	5%	7%	5%	8%
Management (dues, office supplies, legal/accounting services etc.)	2%	4%	4%	3%
Marketing (advertising/promotion, group sales expenses)	4%	5%	3%	6%
Shows and entertainment expense (not including labor)	1%	1%	0%	0%
Food and beverage expense (not including labor)	7%	7%	4%	4%
Game and arcade expense (not including labor)	4%	2%	4%	10%
Merchandise/retail expense (not including labor)	2%	2%	2%	2%
Ride supplies expense	1%	1%	2%	0%
Credit card fees	2%	0%	1%	1%
Utilities (sewer, trash, fuel, telephone, etc.)	3%	3%	3%	5%
Taxes and permits	3%	3%	5%	3%
Insurance	4%	2%	1%	4%
Outside contractors/service	1%	3%	2%	1%
Rental expenses	1%	3%	9%	3%
Miscellaneous expenses	6%	2%	6%	1%
Total	n=69	n=26	n=13	n=7

Q7.5 What percentage of annual gross revenue did the facility spend on each expense category in 2019?

APPENDIX 7.1

Full Time/Part Time Employees

No. of Employees (peak season)	Overall		North America		Europe/ Middle East		Latin America		Asia Pacific	
	n=	%	n=	%	n=	%	n=	%	n=	%
Full Time Employees										
• 0	5	3%	4	3%	1	2%	0	0%	0	0%
• 1-10	96	48%	66	52%	22	49%	6	29%	2	22%
• 11-20	34	17%	23	18%	6	13%	2	10%	3	33%
• 21-50	24	12%	14	11%	5	11%	5	24%	0	0%
• 51-100	17	9%	11	9%	2	4%	2	10%	2	22%
• 101-200	6	3%	2	2%	1	2%	2	10%	1	11%
• 201-500	6	3%	1	1%	3	7%	1	5%	1	11%
• More than 501	6	3%	0	0%	3	7%	3	14%	0	0%
• Don't know	7	4%	5	4%	2	4%	0	0%	0	0%
Average (no.)	48		22		78		128		78	
Part Time Employees										
• 0	9	5%	5	4%	2	4%	2	10%	0	0%
• 1-10	52	26%	29	23%	15	33%	6	29%	2	22%
• 11-20	39	19%	23	18%	8	18%	4	19%	4	44%
• 21-50	38	19%	24	19%	9	20%	4	19%	1	11%
• 51-100	25	12%	18	14%	5	11%	1	5%	1	11%
• 101-200	14	7%	12	10%	2	4%	0	0%	0	0%
• 201-500	9	5%	4	3%	1	2%	3	14%	1	11%
• More than 501	9	5%	6	5%	2	4%	1	5%	0	0%
• Don't know	6	3%	5	4%	1	2%	0	0%	0	0%
Average (no.)	73		76		60		91		59	
Retention Rate	54%		55%		54%		67%		75%	

Q8.1 How many full-time and part-time employees (incl. management) to you have at the facility during peak season?

Q8.2 What is your estimated seasonal employee retention rate?

APPENDIX 7.2

Full Time/Part Time Employees

No. of Employees (peak season)	Estimated Total Attendance										Facility Type			
	Less than 50,000		50,001-150,000		150,001-500,000		500,001-1 million		More than 1 million		Indoor-Only Attractions		Both Indoor and Outdoor	
	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%	n=	%
Full Time Employees														
• 0	3	5%	1	2%	0	0%	0	0%	1	5%	4	3%	1	2%
• 1-10	40	68%	26	55%	11	33%	4	25%	1	5%	66	48%	22	49%
• 11-20	8	14%	8	17%	10	30%	2	13%	4	19%	20	15%	8	18%
• 21-50	5	9%	8	17%	3	9%	3	19%	2	10%	17	12%	5	11%
• 51-100	1	2%	4	9%	4	12%	4	25%	3	14%	11	8%	6	13%
• 101-200	0	0%	0	0%	2	6%	3	19%	1	5%	6	4%	0	0%
• 201-500	0	0%	0	0%	2	6%	0	0%	4	19%	5	4%	1	2%
• More than 501	1	2%	0	0%	1	3%	0	0%	4	19%	4	3%	1	2%
• Don't know	1	2%	0	0%	0	0%	0	0%	1	5%	5	4%	1	2%
Average (no.)	19		18		65		57		206		52		40	
Part Time Employees														
• 0	4	7%	1	2%	1	3%	1	6%	1	5%	6	4%	1	2%
• 1-10	26	44%	13	28%	5	15%	3	19%	0	0%	38	28%	11	24%
• 11-20	17	29%	10	21%	5	15%	2	13%	1	5%	28	20%	6	13%
• 21-50	9	15%	13	28%	7	21%	1	6%	3	14%	26	19%	10	22%
• 51-100	2	3%	7	15%	7	21%	1	6%	5	24%	17	12%	5	11%
• 101-200	0	0%	2	4%	5	15%	3	19%	1	5%	7	5%	5	11%
• 201-500	0	0%	0	0%	2	6%	2	13%	5	24%	7	5%	2	4%
• More than 501	0	0%	1	2%	1	3%	3	19%	4	19%	5	4%	4	9%
• Don't know	1	2%	0	0%	0	0%	0	0%	1	5%	4	3%	1	2%
Average (no.)	15		44		87		185		230		68		103	
Retention Rate	67%		52%		47%		58%		38%		52%		56%	

Q8.1 How many full-time and part-time employees (incl. management) to you have at the facility during peak season?

Q8.2 What is your estimated seasonal employee retention rate?

APPENDIX 7.3

Employee Profile (age)

Age Bracket	Overall	North America	Europe/ Middle East	Latin America	Asia Pacific	Indoor-Only Attractions	Both Indoor and Outdoor
	Avg.	Avg.	Avg.	Avg.	Avg.	Avg.	Avg.
17 years old and younger	16%	22%	7%	0%	14%	14%	19%
18-20 years old	51%	51%	55%	52%	35%	53%	48%
21-30 years old	20%	15%	24%	33%	39%	20%	20%
31-50 years old	9%	8%	11%	10%	9%	8%	9%
51-64 years old	3%	3%	3%	4%	2%	3%	3%
65 years old and older	1%	2%	0%	0%	0%	1%	0%
Average Age	25.8 years	25.1 years	26.4 years	27.8 years	26.7 years	25.8 years	25.3 years
Total	n=173	n=106	n=40	n=20	n=7	n=119	n=41

Q8.3. What percentage of your employees fall into each of the following age categories?

APPENDIX 8.1

Standard charges and experiences offered

Attractions	North America	Europe/Middle East	Latin America	Asia Pacific
Average Charges (in U.S. dollars)				
• Single bumper boat ride	\$6.73	\$3.50	\$2.30	\$1.50
• Single miniature-golf game	\$7.25	\$4.50	\$1.50	\$9.00
• Single laser tag game	\$7.86	\$6.38	\$1.50	\$6.17
• Single rock wall climb	\$6.73	\$4.55	\$3.00	\$4.83
• One hour of trampoline park	\$9.20	\$6.77	\$4.06	\$10.00
• One hour of ropes course	\$9.28	\$5.75	\$4.50	\$7.25
• Single go-kart ride	\$8.22	\$4.43	\$6.40	\$8.50
• One zip-line trip	\$7.32	\$4.82	\$5.25	\$8.50
• One VR game	\$7.60	\$5.50	\$3.68	\$7.10
Experiences Currently Offered				
• Single bumper boat ride	28%	41%	28%	14%
• Single miniature-golf game	47%	29%	13%	25%
• Single laser tag game	50%	60%	19%	38%
• Single rock wall climb	33%	67%	18%	75%
• One hour of trampoline park	16%	72%	44%	57%
• One hour of ropes course	21%	44%	19%	29%
• Single go-kart ride	40%	45%	29%	25%
• One zip-line trip	15%	34%	13%	29%
• One VR game	53%	54%	61%	75%
Total	n=126	n=45	n=21	n=9

Q9.1 What is the facility's standard charge (in U.S. dollars) for each of the following attractions? (Select all that apply.)

APPENDIX 8.2

Standard charges and experiences offered

Attractions	Less than 50,000	50,001-150,000	150,001-500,000	500,001-1 million	More than 1 million	Indoor-Only Attractions	Both Indoor and Outdoor
Average Charges (in U.S. dollars)							
• Single bumper boat ride	\$5.77	\$5.95	\$5.00	\$7.50	\$2.75	\$4.24	\$5.81
• Single miniature-golf game	\$5.67	\$6.61	\$6.97	\$7.42	\$6.07	\$6.12	\$7.37
• Single laser tag game	\$7.32	\$7.20	\$6.47	\$8.50	\$5.17	\$7.02	\$7.50
• Single rock wall climb	\$6.45	\$6.24	\$5.33	\$5.33	\$4.25	\$5.80	\$4.95
• One hour of trampoline park	\$7.15	\$7.33	\$8.42	\$6.60	\$5.33	\$8.04	\$5.22
• One hour of ropes course	\$7.56	\$9.36	\$6.81	\$8.10	\$5.25	\$7.95	\$6.50
• Single go-kart ride	\$6.61	\$6.88	\$7.23	\$7.89	\$6.06	\$6.81	\$7.46
• One zip-line trip	\$6.33	\$7.94	\$6.58	\$3.50	\$2.63	\$5.42	\$5.89
• One VR game	\$7.10	\$6.81	\$6.44	\$7.15	\$4.54	\$6.70	\$6.45
Experiences Currently Offered							
• Single bumper boat ride	24%	27%	15%	64%	56%	21%	46%
• Single miniature-golf game	21%	45%	57%	64%	44%	25%	66%
• Single laser tag game	38%	39%	52%	79%	59%	49%	51%
• Single rock wall climb	27%	45%	58%	55%	65%	35%	51%
• One hour of trampoline park	32%	16%	46%	42%	59%	36%	26%
• One hour of ropes course	17%	19%	31%	45%	53%	22%	37%
• Single go-kart ride	28%	30%	54%	69%	47%	26%	64%
• One zip-line trip	15%	22%	24%	10%	38%	14%	27%
• One VR game	42%	54%	61%	77%	76%	58%	53%
Total	n=59	n=47	n=33	n=16	n=21	n=138	n=45

Q9.1 What is the facility's standard charge (in U.S. dollars) for each of the following attractions? (Select all that apply.)



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