

THE GLOBAL RESOURCE FOR ATTRACTIONS PROFESSIONALS

Attractions

MANAGEMENT

2018-2019 HANDBOOK

in association with



PolinWaterparks



FUTURE VIEW

16 Development Pipeline

Global projects breaking ground sector-by-sector: theme parks; visitor attractions; waterparks; zoos and aquariums; planetariums and science centres; museums and galleries; parks; and expos

INDUSTRY INSIGHTS

72 One Planet

Socially relevant exhibitions in a fast-moving market puts leading science attraction Museon one step ahead. Maarten Okkersen tells us how

80 Dusk til Dawn

Nick Stockman from Culture24 is campaigning for the arts community to drive the trend for 'out of hours' events, profiting attractions and the high street

88 Just the Ticket

AECOM's latest Theme Park and Museums Index showcases the stats behind the global attractions industry – and just how well it's performing

94 EMEA Focus

Margreet Papamichael shines a spotlight on the ups and downs of the theme park and waterpark markets in Europe, the Middle East and Asia

98 Striving for Sustainability

We should all join the battle against climate change, plastic pollution and the illegal wildlife trade. Doug Cress from WAZA speaks out on sustainability

104 Splashing Out

Kathleen LaClair and Brian Sands have teamed up to give us an insight into the potential growth of the waterparks market. Is enough ever enough?



CONTENTS

112



Can science centres help to halt fake news

FEATURES

112 Fact or Fiction?

Public trust in established institutions is at an all-time low, providing a post-truth platform for social media hearsay. Linda Conlon warns against the rising tide of inaccurate data and tells us how science centres can equip us with the tools to tell fantasy from reality

122 On Reflection

Epic, Wild and Great. Helen Patenall, editor of *Attractions Management Handbook*, takes a look at some of the stand out waterparks that made a monumental splash onto the global scene in 2018, setting a high benchmark for the years ahead

128 Work Your 'Sox' Off

We ask Thomas Mack about Europa-Park's latest foray – this time into the world of health and fitness. The German theme park's Boston Red Sox Gym enterprise offers visitors time out to relax from the thrills while boosting off-season attendance with local members

132 Diving into 2019

TrendWatcher Henry Mason is always one step ahead, analysing today's trends to anticipate what tomorrow might bring. Ever-enlightening, Henry looks at current consumer expectations to help us foresee how best to plan for constantly evolving audiences

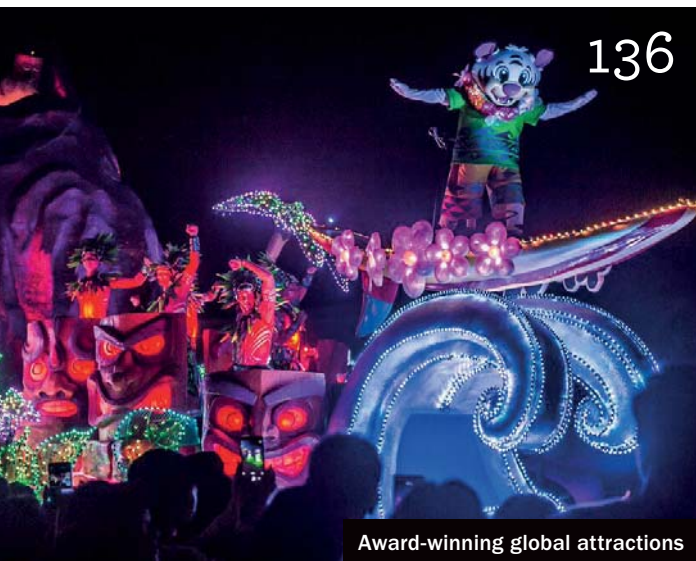
136 Thea Awards

Compelling, engaging, artistic, entertaining and educational – the best themed entertainment and experience designs in global attractions. Matt Kerr summarises the latest Themed Entertainment Association's Thea Awards taking the sector by storm

154 Good Natured

Attractions Management Handbook editor Helen Patenall takes a tour of some awesome technological approaches being embraced by zoos and aquariums around the world that are championing animal welfare and how we all interact with the natural world

136



Award-winning global attractions



122

World-class waterparks offering more splashes than ever

RESOURCES

162 Company Profiles

A snapshot of the leading suppliers, designers and service providers immersed in the attractions market around the world. What could they do for you?

202 Product Innovation

Suppliers and designers tell the stories behind their latest innovations and product launches, with full contact details available at www.attractions-kit.net

214 Events Calendar

A month-by-month guide to conferences, exhibitions and expos giving us the low down on what's happened – and what's on the cards – in attractions

218 Industry Associations

Contact details of trade organisations representing operators, manufacturers and suppliers in the global attractions market

220 Green Resources

Organisations supporting sustainability

222 Address Book

Contact details of leading companies

248 Product Selector

Key attractions suppliers by sector

270 Attractions Management Gallery

Key suppliers in the attractions sector

THE TEAM



Helen Patenall
HANDBOOK EDITOR
helenpatenall@leisuremedia.com
tel: +44 1462 471 922
twitter: @helenpatenallLM



Liz Terry
EDITORIAL DIRECTOR
liz@leisuremedia.com
tel: +44 1462 435 502
twitter: @elizterry



Tom Anstey
MANAGING EDITOR
tomanstey@leisuremedia.com
tel: +44 1462 471 916
twitter: @TheTomAnstey



Julie Badrick
PUBLISHER
juliebadrick@leisuremedia.com
tel: +44 1462 471 919
twitter: @JulieBadrickAM

SUBSCRIPTIONS / SALES

Denise Adams +44 1462 471 930

NEWSDESK

Tom Anstey +44 1462 471 916

ADVERTISING SALES

Jan Williams +44 1462 471 909

WEB TEAM

Michael Paramore +44 1462 471 926

Dean Fox +44 1462 471 900

Emma Harris +44 1462 471 921

LEISURE MEDIA STUDIO / SOCIAL

Tim Nash +44 1462 471 917

PRODUCTS EDITOR

Lauren Heath-Jones +44 1462 471 927

DESIGN

Sharon Hale +44 1462 471 916

FINANCE

Rebekah Wilkinson +44 1462 733 477

CIRCULATION

Michael Emmerson +44 1462 471 932

ISBN 978-1-870416-29-0

Attractions MANAGEMENT



PRINT

The *Attractions Management Handbook* is available in glossy print on subscription



DIGITAL

Read the *Attractions Management Handbook* free on digital turning pages and enjoy extra links and searchability



PDF

The *Attractions Management Handbook* is also available as a PDF edition

OTHER RESOURCES FROM ATTRACTIONS MANAGEMENT

Attractions Management magazine

Attractions Management subscribers work in all areas of the global attractions industry. The magazine is available in print, digital and PDF

■ **Read online:**

www.attractionsmanagement.com/digital

Attractions Management ezine

The *Attractions Management* ezine brings the best of the week's news and jobs to your inbox every Wednesday

■ **Sign up here:**

www.leisuremedia.com/subscribe

attractionsmanagement.com

The *Attractions Management* website features daily news and jobs, access to digital editions of *Attractions Management* and links to other Leisure Media magazines and websites

■ **Visit the website:**

www.attractionsmanagement.com

AM2

Our sister title focuses on news, jobs and training with a daily website, www.am2.jobs, an ezine and an instant alerts service

■ **Read online:**

www.am2.jobs/digital

■ **Sign up here:**

www.leisuremedia.com/subscribe

attractions-kit.net

The search engine for buyers lists contacts and details for 5,000 suppliers. Find all the connections you need to streamline your buying and get news via the weekly ezine

■ **Visit the website:**

www.attractions-kit.net

Instant alerts & RSS

Get the news and latest job openings and tenders the second they're posted online – sign up for our free, customisable instant news alerts and RSS feeds

■ **Sign up here:**

www.leisuremedia.com/subscribe

The views expressed in individual articles are those of the author and don't necessarily represent those of the publisher, Leisure Media. All rights reserved. No part of this book may be reproduced, stored in a retrieval system or transmitted in any form or by any means without permission of the copyright holder. ©Cybertrek 2019.

DUSK TILL DAWN

Developing a 'Culture of Lates' at museums and galleries profits cultural attractions, F&B providers, high street retailers and visitors. Nick Stockman tells us more about the huge potential of night-time events





Night-time tours at London's Old Royal Naval College attract a late-night crowd

A BRIGHT IDEA

A new festival of museum night-time events (Lates) will take place in London on midsummer's weekend in June 2019. This inaugural Otherworld festival (formerly Museums at Night) will spearhead 'A Culture of Lates' – a commitment by policymakers and museum leaders to invest in Lates as the industry's contribution to the UK's burgeoning night-time economy (NTE).

The concept of A Culture of Lates was first proposed in February 2018 when three linked research reports were published by Culture24 (supported by the Arts Council England, the Winston Churchill Memorial Trust and Airbnb), examining for the first time the role that Lates play in the NTE, both in the UK and internationally (with case studies from Sydney, Melbourne, Moscow and Mexico City) – in addition to the potential positive impact of cultural tourism.

A NATION OF LATES

The research findings point to healthy prospects for the growth of UK Lates, and these opportunities can be seen as a roadmap for future development:

- supporting Lates to develop them into a significant contributor to a diverse and harmonious NTE
- offering a high-quality product that generates additional income for museums and galleries
- exploiting the growing demand for an offer that combines creative content with food and beverage under one roof
- combining regular programming with big festival moments to build event capacity
- using the power of customer data to help policymakers and programmers develop future strategy

The new London Lates festival (Otherworld) is one example of how Culture24 is supporting the sector to exploit these opportunities. The festival



© PETE CARR COURTESY OPEN CULTURE

OTHERWORLD, UK

In June 2019, the Otherworld festival will replace Museums at Night in London. Targeted at 18-35 year olds, guests with pre-paid wristband tickets will have access to every event on a chosen night and can move around attractions in a circuit or travel to venues in any area.

<https://weareculture24.org.uk>



MUSEUMNACHT (N8), THE NETHERLANDS

Every November, around 50 museums in Amsterdam open their doors from 19:00 to 02:00 to offer special events like workshops, concerts, special tours and performances, and even food and beverage.



© OPEN CULTURE

LightNight is Liverpool's free one-night arts festival involving 100 organisations annually to create an inspiring trail of events for a diverse audience of 15,000



© BENEDICT JOHNSON

Science Museum London hosts regular Silent Disco Lates

will offer customers a high-quality, unique offer, simple to understand and attractive to identify with. Venues will get an opportunity to reach new people, earn revenue and work together, synthesising the opportunities the research identified into market-ready practice. This new model for a UK museum festival can be applied to any town or city with a handful of non-performing arts venues in close proximity to each other: Amsterdam and Budapest's versions (Museumnacht and Nights of the Museum) are approaching their third decades of successful life.

FOR WHAT'S IT WORTH

If creative opportunities like Otherworld are grasped by policymakers and venues in a planned and systematic way, UK towns and cities could benefit from an increase in the number of Lates events, the number of people attending them and income generation.

Culture24 has calculated the current domestic Lates event market to be worth £9.6m in ticket earnings annually. If the report's recommendations are implemented and it leads to year-on-year growth in ticket capacity, sales and earnings of five per cent, this would add an additional £7.7m to ticket income over a five-year period. This growth in economic activity would lead to growth in the venues' F&B income and boosted earnings for surrounding local businesses and supply chains.

These economic impact figures do not take into account the 29 per cent of Lates in the UK that don't charge for entrance but still generate secondary income for venues in F&B spend, merchandise, corporate hires and membership packages – and for towns and cities from travel and high street spend.

Equally important is the social value capital that Lates generate. They simply



Experiences are made more memorable by participation - the act of doing leaves a lasting impression on the psyche

© JOE VAN AERT



Lates enable people to enjoy their local and national culture at a time that's convenient



There's a feeling that
Lates are only open
to the elite few ...
those in 'the know'

enable people to enjoy their local and national culture at a time that's convenient. Don't underestimate how positive simple accessibility is or how alienating it is for communities not to be able to enjoy institutions they own and pay for when they want to.

HIGH STREET REVIVAL

The typical UK high street is changing and retail is struggling, but people are willing to pay for experiences such as new F&B offerings. Museums and galleries have an opportunity to help the high street evolve, sucking people back into city centres from soulless out-of-town retail parks. To succeed they must embrace their assets: their unusual spaces set in beautiful buildings, often well equipped with technical infrastructure and expertise.

F&B is a big part of an experiential offer; many institutions farm out this potentially lucrative income stream to third-parties often owned by remote behemoth corporations. A successful experiential offer is high quality and authentic from the first marketing touchpoint, through to the primary event content and supplementary relationships like customer service, before ending on the good night and follow-up email.



© BENJAMIN EALOVEGA

Science Museum Lates are adults-only, after-hours theme nights with a F&B offer

LOSE YOUR INHIBITIONS

Experiences are made more memorable by participation – the act of doing leaves a lasting impression on the psyche.

Museums and galleries can be supportive spaces for adults to lose their inhibitions around playfulness and many have great relationships with the 'spirit guides' of participation – artists.

Artists love playing around in the vaulted ceilings and within the decorated walls of museums and galleries when the light outside is lost. Creatives' imaginations burst into life, license extended – permission granted, to turn stasis into static electricity for participation-hungry audiences.

Responses to public surveys indicate customers want events to include music,

artists, talks plus food and drink. Event listings data shows this is exactly the offer museums are increasingly providing, proving venues are alive to demand.

Rainbow Makers

Danish-born artist Tine Bech devised a participatory and playful treasure hunt type intervention called Rainbow Makers¹, and activated it at Whitworth Art Gallery in Manchester in 2016. Participant groups (Rainbow Makers) wore light vests adorned with interchangeably-coloured remotely controlled LEDs and were tasked with finding seven iconic art pieces, each designated with a colour of the rainbow and 'guarded' by 'Gatekeepers'. On finding the artworks, the Gatekeepers switched each team's vest colours



MÚZEUMOK ÉJSZAKÁJ, HUNGARY

For more than 16 years, the doors to Budapest's museums have been open late for one night annually, inviting residents to choose from almost 1,000 events across the city. June 2018 celebrated the theme: "What binds us: family and culture".

on using handheld remotes and took photos, uploading them to a giant screen in the venue's hub. On completing the seven-stage quest, the teams returned to the hub to see their photos on a giant onscreen rainbow and collected a print of their favourite Rainbow Maker image.

The sell out event appealed to the local catchment of diverse young people. The game permitted play with friends, family and strangers, introduced artworks in an interactive way and was great fun. The palpable excitement while donning the vests set the tone for the whole event.

London leads

London's offer leads the way in the UK. Each exhibition at the Royal Academy of Arts has its own one-off "RA Late" held

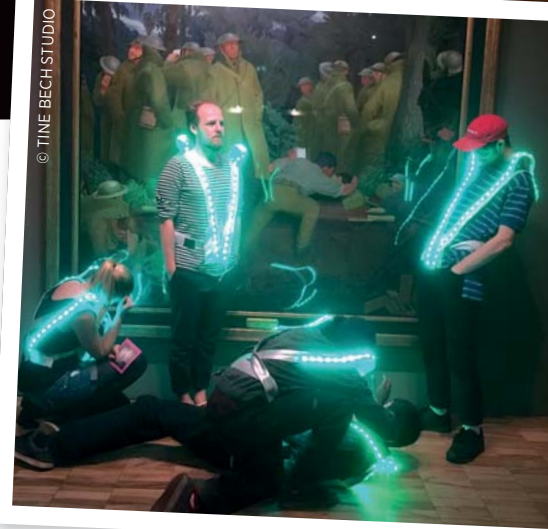


RA's Summer Pleasure Garden (above) and Rainbow Makers at Whitworth Art Gallery (right) embrace luminous themes

on a Saturday night – the programme has included an inflatable cosmic installation, themed supper clubs, a UV Garden of Eden life-painting, Klezmer dancing, Pollock-inspired paint splattering and robotic displays. Science Museum Lates hosts adults-only, after-hours theme nights on the last Wednesday of the month.

Widen the net

Although magic can be conjured up in museums at night, there remains a feeling that these shows are only open to the elite few, those in 'the know', well-connected or simply lucky enough to be in the right place at the right time. A big chunk of Lates also happen on the same day of the last week of the month.



AROUND THE WORLD

In cities like Berlin, Moscow and Paris, annual museum night-time events and festivals attract hundreds of thousands of people. How do they do it?



Amsterdam's N8 is run by young people for young people and sells out in just five weeks

Moscow never sleeps

Moscow is a particularly instructive example – its policymakers and programmers have embraced late opening and it's simply normal to visit museums, galleries and libraries until 10pm.

In this environment, their three annual showpiece nights – Museums, Art and Libraries Nights – thrive. In Moscow people expect their cultural services to be open at convenient times, so when there's a fabulous big annual moment with bags of extra creative content and multi-faceted partners, they're ready!

Moscow Central Library's director Maria Privalova explains: "Part of the 90s was that everything was 24 hours. [It] was

part of earning more money basically. So this was something that everybody started to do. It feels very not Muscovite that all these restaurants are [now] closing at 11, it's crazy, they should be 24 hours. When something is not open at night, I think it's strange."

Mexico City joins hands

Mexico City's monthly Noche De Museos festival is one of the most prolific Lates programmes in the world: 40 to 50 venues join hands every month for a night of Lates organised by the city council.

Ana Rita Garcia-Lascurain, director of Mexico City's Chocolate Museum, says: "Having the obligation of doing something

every last Wednesday of the month has been very motivational."

Amsterdam blazes a trail

Amsterdam's annual Museumnacht event, known as N8, is a phenomenal trail-blazing event and organisation. Run by young people for young people, the four paid employees must be under 30 years and be in the post no longer than three years. N8 sells out its 33,000 tickets every year in just five weeks to Amsterdam postcode residents only.

Sheffield's alive after 5

It's clear from such examples that Lates can play a fundamental role in how a



Noche de Museos annually unites up to 50 venues across in Mexico City (above). Museums Sheffield partners up with local businesses (right)



town or city perceives itself, that each location's offer is unique, a reflection of the place it's rooted in and the journey they want to go on.

This placemaking aspect of the Lates phenomenon has been picked up by Sheffield in the UK where Museums Sheffield is working in close partnership with the area's Business Improvement District organisation. Museums and the retail sector now offer joint incentives to customers to stay on in the city centre under the Alive After Five banner. Both sectors have made a commitment over a number of years to work together to send a message to locals that their high street is open for business well into the evening.

URBAN CULTURE

For years we've been encouraging people to get into their cars and travel out of cities to purchase food and clothing and take advantage of leisure opportunities. The pendulum has started swinging back into city and town centres. Environmental awareness, travel costs and inner-city



Culture24 calculated the UK Lates event market to be worth £9.6m in ticket earnings annually

residential building have all contributed to a newly vigorous sense of urban living.

Travel and tourism disruptors like Airbnb are enticing more people to stay in city centres, many driven to new places by attractive cultural offers. Suddenly a whole new generation of visitors is available to museums and galleries, less encumbered by past prejudices.

But more investment is needed to enable them to open later. The offer is not complete without programming and that must be paid for if artists are to earn

a decent living. Venues can be subsidised to offer free access and/or the audience asked to pay a fair price for a high-end offer. Both models can work side-by-side to build capacity and meet demand.

We all have notions of what people, places and institutions are going to be like before we first experience them. Lates are an opportunity for the sector to collaborate to create this other world where people's expectations of what museums and galleries are like are turned upside down. There's nothing more memorable than that, is there? ●

¹ www.tinebech.com

About the author

Nick Stockman is campaigns manager at Culture24 – an independent charity aimed at bringing UK arts and heritage organisations closer to their audiences

www.weareculture24.org.uk [@Culture24](https://twitter.com/Culture24)
E: LatesResearch@culture24.org.uk



Attractions

MANAGEMENT

2018-2019 HANDBOOK

DEVELOPMENT PIPELINE

INDUSTRY INSIGHTS

THEME & MUSEUM INDEX

THEA AWARDS

COMPANY PROFILES

PRODUCT INNOVATION

EVENTS CALENDAR

INDUSTRY ASSOCIATIONS

GREEN RESOURCES

ADDRESS BOOK

WEB GALLERY



www.attractionshandbook.com

978-1-870416-29-0

