



A Comparative study of five different theme parks of india to evaluate their quality parameters for value addition in tourism sector

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Abstract: In tourism industry, theme parks play a significant role in enhancing the demand of tourism and revenue which stimulates tourism trips. The Amusement Park Industry have to focus on delivery of high quality services to guests which is one of the key performance factors. Competition in Theme park grows along with the growing number of parks and the variety of leisure activities inside the park. There is always a need for optimization with this ever changing market and the trends of consumer behavior for a stay in this competition. This article attempts to find out the competitive parameters like Factor of Entertainment Quality & Value, the quality of theming, landscaping, financial revenue aspect, the strengths and weakness for a competitive mapping of five different Indian Theme Parks to find out the areas of improvement for the value addition of Tourism Sector.

Key Words: Amusement Park, Tourism Industry, Competitive Parameters.

I. INTRODUCTION

India has witnessed the growth of Amusement Park in the last two decades and little more only. It first started in the few metro cities and later, slowly the spread continued to different other cities of India-- tier I and even tier II cities. Today India stands with a total number of 150 Amusement parks with a varied investment range of 5cr to 150cr to 300cr and above. The Amusement park industry contributes around 40% of the total turnover of Indian Leisure Industry with its growth and development. Theme park sector is always different from the traditional outlets of Tourist attractions because it's totally human created and made in an artificial environment, yet it has developed out very competitive and attractive sector (Lillestol, Timothy, Goodman, 2015).

Tourism Industry in India is vibrant and substantial and contributes to one of the profitable industries contributing a significant amount of foreign exchange, with total contribution of over 247 billion US dollars to the country's GDP in 2018. It's expected to gain a high jump over 500 billion US dollar by 2029. (Statista -Travel and tourism industry in India - Statistics & Facts, Sandhya, Keelery, Nov 19, 2020)

An Amusement park is a place for a group of open rides, or events for the fun and enjoyment catering to a large number of people. It is aimed for all aged groups, some to certain age groups, specific types but keeping the aim of providing unlimited happiness, fun and frolic to the people. Theme parks are considered to be that amusement park that grows and develops around only any one specific theme and built different games and rides based on those themes. Amusement Parks in India attracts over 30 million visitors annually and efforts should be made to increase it every year. The goal of IAAPI (Indian

Association of Amusement Park Industry) is very focused to establish the fact that Amusement parks is not limited to only fun rides and games, but rising more into tourist destination.

The objective of this article identifies five different Indian Theme Parks with some competitive mapping for the purpose:

1. Identify few areas of improvement
2. How well these improvements will be benefited to the Indian Tourism Sector
3. Identify few challenges for amusement parks
4. How this Improvement affects revenue

THE INDIAN AMUSEMENT PARK INDUSTRY

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The beginning of 21st century saw the evolving of so many parks like Appu Ghar in 1984 to Esselworld to Nicco Park and many more in small to big cities, depending on the class of the city, investment and many other factors. During last 10 years at least 40 new parks came up with an investment ranging from 5cr to 30cr in different cities other than metros. It is very much noted fact that due to huge land requirement, majority of the parks are set outside the city area. According to IAAPI (Indian Association of Amusement Parks and Industries), the Indian amusement and theme park industry has been growing at a CAGR of more than 17.5% with annual revenue of INR 17 billion.

The industry with its so many openings offers a huge employment to the youngsters in varied fields encircling this amusement park. Service related training also help to boost up the employment and increase the customer satisfaction. Along with employment many business cornered around with a broad data base like retails, restaurant, and transportation. Indeed this industry sector is a boon to Indian economy provided it's guided in the right direction with trained staff and given due recognition.

COMPETITION AND STRATEGY

Tourism companies, always put consumers as their first priority with radical and far reaching innovations and strategies. Any successful tourism destination or theme parks consider customer satisfaction as most important source of competitive advantage (Fuchs, 2004). As theme park sector are in a continuous process of growth and change, so competitiveness stands as a key element to study and do research in this sector. As the old theories of competitiveness has gone obsolete, so research needs to be done for the existing theories and the applicability of these theories and discuss their relevancy in present business.

Strategy, on the other hand, defines the means to achieve the competitive advantage in any forms in any industry. It is a position which a company desires for making its progress. Lillestol, Timothy and Goodman (2016) came up with a model based on last 35 years of research to understand the strategies applicable for Theme parks.

Strategies are defined in the following manner:

1. Value: When a company sells its products at a much cheaper rate than its competitors, and later this factor turns out to be sole factor for positioning strategy.
2. Uniqueness: The Company provides something which others do not; that makes their product sell high. Service oriented organization can definitely make success with their uniqueness in products (Pine and Gillmore, 1999)
3. Niche: It's an opportunity to sell a particular product to a particular group of people.
4. Innovation: To attract the tourists it's important for every theme park to get their products innovated, and use it as flexible specialization strategy. Business will increase with the repeat customers and to add them more it's a must to get the products innovated, optimized, construction of new rides, and with large investment the renovation of the existing rides (Clave', 2007).

5. Variety: This strategy is adopted by companies to provide as many options possible to the customers for their satisfaction. Here, flexibility is the main goal to provide the competitive advantage and required in tourism industry (Milman, 2009).

6. Quality--- It has been noted that to stand unique in theme park, you need to satisfy clients with your quality of service and products (Clave' 2007).

Generally, Theme Parks are considered to be a subset of Visitors attraction, where the later can be characterized and defined as any resources which are permanent and are modified, re-constructed and managed for entertainment, enjoyment, recreation and amusement. As a new concept of Amusement parks, attempts are always made to create a fantasy and imaginary environment for the fun and enjoyment (Milman 2008). As Milman (2008) states that for a contemporary theme park, theming is related and reflected through architectural point, through the landscaping, and the quality of theming. Along with this, come the costumed personnel, rides, shows, and uniqueness in shows, merchandising products and other services and these all count for the impact of guest's experiences.

According to Kotler (1994) and Swarbrooke (1995), there are three levels of a product in a theme park, and each level has its own features (Fig 1):

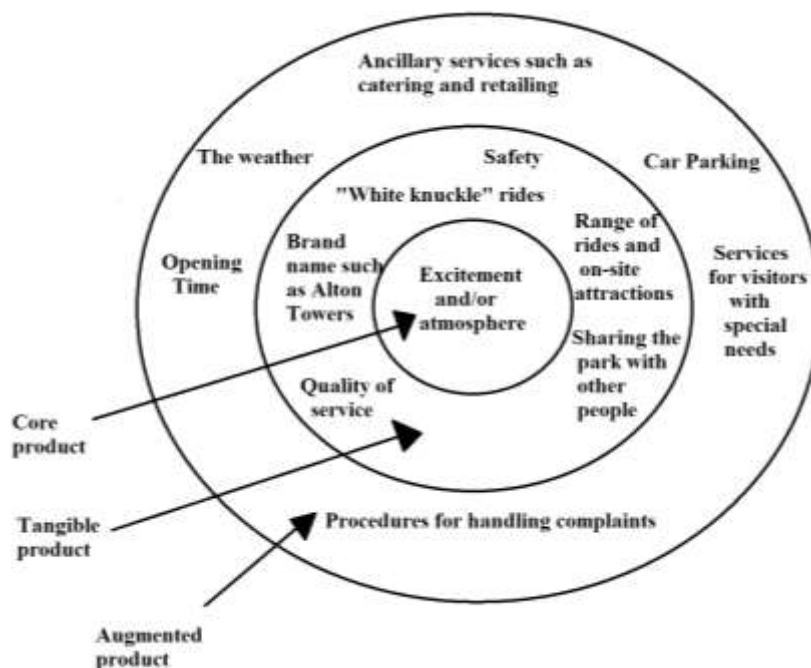


FIGURE 1- The three levels of product of amusement park

Theme Park: Education Bureau www.edb.gov.hk

Core product is at the fundamental level and what exactly the visitor is actually buying. Tangible product or the Supported Product is the extra products that add to the value of core product. It is these Tangible products only that differentiated on e park from the other. Last is the Augmented product - which the customers are actually not buying but these features in the park make the trip experience more comfortable and enhance the guests' experience. The above picture (Fig 1) is self-explanatory and well mentioned that for Theme parks these three levels of are a must to get the product go on sale.

Key Findings

This research has been undertaken to find out the competitive mapping of five different Theme Parks of India to find how well these factors can be used for the benefit of the Tourism Sector of India, in terms of value addition, more revenue generation and betterment.

The Parks taken for competitive landscaping are:

1. Nicco Park, Kolkata
2. Wonderla, Bangalore
3. Imagica, Pune - Mumbai
4. Essel World, Mumbai
5. Aatapi Wonderland, Vadodara.

Competitive factors of Selected Amusement parks:

(I) Year of Establishment and Land area:

The first basic parameter taken is the year of Establishment and total acres of land on which the park is spread

Table 1:

	Nicco Park	Wonderla	Imagica	Essel World	Aatapi
Est. Yr	1991	2005	2013	1989	2018
Total Acres	40 acre	82 acres	130 acres	26 ha	70 acres

The highest spread out of these 5 parks is for Imagica with 130 acres, followed by Aatapi with 70 acres. But both of these parks are established in the last 7 years. While Imagica has entered the market in 2018 but captured very well the domestic market, Aatapi with its tenure of just 2 years yet to prove it.

(II) Rides - Segment Analysis

The mechanical rides section is the major shareholder while comparing the different amusement parks. It is due to the number of guests' demand and the rush for the latest 4D rides, giant rides, the challenging roller coasters that makes excitement go different from park to park. The launch of the new theme parks with enlarging the scope of mechanical rides has made the customers meets their enjoyment factor reach high.

Table 2: Variety of rides with the latest technology

	Nicco Park	Wonderla	Imagica	Essel World	Aatapi
Total rides	35	61	38	71	42

Analysis of the rides:

Some of the latest mechanical rides installed in the different Amusement parks created a high demand for these parks. The 35 - 50 age groups accounts for the excitement market in amusement parks.




1. THRILLER RIDES

Imagica- Dare2drop (D2)	Aatapi - Skydrop	Nicco Park -Sky Dive
Shoots the riders up to a height of 132 feet with speed of 73kmph. It shoots and bounces several times to make the riders feel weightlessness.	Height being considerably low with approx. 50ft and low speed but definitely gives the same adrenaline rush to riders for the high level screaming. It shoots up but doesn't bounce back several times.	It is an 80 ft. long shoot out with less speed. But it is definitely a high thriller ride and gives the same sensation to guests







PENDULUM RIDES

These types of thriller rides are based on the motion of fixed pendulum. Below table gives a more comprehensive comparison between the different parks on this ride.

Imagica- Scream Machine	Aatapi - Thriller Engine	Wonderla - Equinox
It operates on a rotating pendulum, gaining momentum at the beginning and slowly starts to swing and start spinning. Moves at an angle of 120 degree with a climbing height of 142 ft. Works in pneumatics phenomenon	Same mechanism working with a rotation of 120 degree oscillation with 10Rpm. It has a capacity of 30 seats and hydraulically controlled.	It creates the same thriller, with the capacity of 25 guests, with suspended seats and each seat with an individual shoulder harness and a lock sensor. The seats rotate on the axis and at peak it moves to 70km/hr, 16 mt above the ground and upside down.
		

CAROUSEL RIDES

A carousel is a merry go round and an amusement ride consisting of a round and circular platform with seats on it for rides. The seats are made to look like objects as automobiles, trains or any animals for attraction. Usually the speed is low because it keeps the centrifugal force low. And faster it turns the more centrifugal force the rides will have. The axis, in the middle has centripetal force, which is opposite of centrifugal force. Based on this basic principal, different parks have developed this theory and catered it with modification for the guests under the Thriller Ride category.

Imagica- Magic Carousel	Aatapi - Flying Hourses	Wonderla - Carousel	Nicco Park - Merry Go Round
This classic carousel is imported from Italy to get the old vintage look, with variety of seats. It's a single layered ride	Kids allowed with specific heights with a rotation of 5Rpm, with strength of 38 guests. It rotates up and down and hence kids enjoy this ride with full vigor. Its double layered ride	Made for kids entertainment, with lovely ambiance and lights. Illumination makes safe for the kids to ride even after sunset. With proper safety measures it's been operated for kids	It's a simple merry go round ride for kids. Its age old and moves with low speed and less attractions
			

Like the above mentioned rides, every ride in every park, named differently, operated on the same basis but have varied heights, movements and mechanism. Every amusement park has its uniqueness catering to the mass as per the age group for the ultimate enjoyment.

(III) Quality & Importance of Theming & Landscaping

A theme can take any form - geographical, historical, social; but the best is to take one theme and execute it well rather than combining too many of them and making public confused. Multiple themes can often result in budgetary issues. So the developers usually think about how much theming is appropriate and whether the the guest experience is sufficient or not.

Imagica, has divided its entire space into zone of different regions of the world and has developed rides and ambiance according to that zone. Imagica with the concept to unite all the guests under one umbrella, stands unique with its different regions associated with different fun experience. Adlabs Imagica is India's first and only International Standard Theme Park, offering fun, action, entertainment, dining and shopping at a single location. According to Lillestol et al (2015), in theme park, creating an image for the theme is much important, rather than focusing only on the rides itself.

The concept of theme does not limit itself to the rides, but extends to the category of dining too (F&B). A major portion of revenue generation has been noticed from this dining section. The popularity of this section caters to the guests with 8 unique **themed restaurants**, 13 food kiosks, with 90,000 sqft of F&B space. The themed restaurants are named differently and behind every name there is history covering the name. On one hand there is Arrmada; the other side is Red Boner American Dinner. The multi cuisine Veg restaurant as Roberto's FoodCourt and the African Tribal outpost named as Zeze Bar & Grill makes food more exciting attracting hundreds of guests.

Aatapi Wonderland, just being 3 years in this market captured a good number of customers with repeat numbers because of its different new additional features in the park. Innovation is an ongoing strategy which is necessary for the survival of theme parks. There is no single theme available at Aatapi; it has been spread across. A different version of the rides with some additional features is installed. But what

excites the guests is the landscaping, the greenery. Guests love the Spectacular Water Laser Show, mesmerizing Jugnoo World which is India's 1st Glow Garden, Lost Valley Dinossaur attraction, Vrindavan Garden with dancing fountain and magical colors, India's first Tubby Jump. And lot many more. The village of Dholakpur coming soon from the animation world of Chota Bheem is also about to open soon. More craze for making the guest visit the park are many more to come.

Wonderla, spread over 82 acres of landscaped garden, has large quantity of different rides, full-fledged dance floor with a twist and electronically controlled rain showers. Wonderla has tagline of India's best Amusement park and has few themed rides being made in-house as well as imported.

Chikku, the Prime mascot of Wonderla, has ride attractions based on the same, and their logos also include the Chikku unit. Rain Disco & Adventure shows of Chikku. They are the most popular themes of Wonderla. Wonderla Bangalore makes the exciting themes on water rides like Yscream, Twisters etc. Theme based F&B also attracts a lot to the tourists for the Park-view restaurant, Chilies restaurant, Greens restaurant, Waves restaurant, and few more. The names are self-explanatory and they have a wide spread from Indian and Chinese to Continental and Italian.

Nicco Park has approximately 35 rides that include the Toy train, Tilt a Whirl, Striking Cars, Paddle Boat, Flying Saucer, Pirate Ship etc. As it is one of the most premiere / oldest parks of India it has some natural attractions which includes rose garden, a 40 ft high waterfall. An educational value is attached to Nicco Park theme of a decommissioned MIG 21 fighter aircraft from the Bagdogra airbase for display, which pulls the students adding a value to the park. The park has its theme also encircling water bodies named as Water parks, Wet-o-Wild, some rain dance performances. An area spread over 40 acres of land have lots of greenery and plantations and landscaping emphasizing on recreation.

(IV) Pricing: This particular strategy for revenue generation in the Amusement Park Industry for Indian market needs to be priced very carefully considering the People, the economic position and the availability of the disposable income of the mass.

Table 3: Comparison of pricing

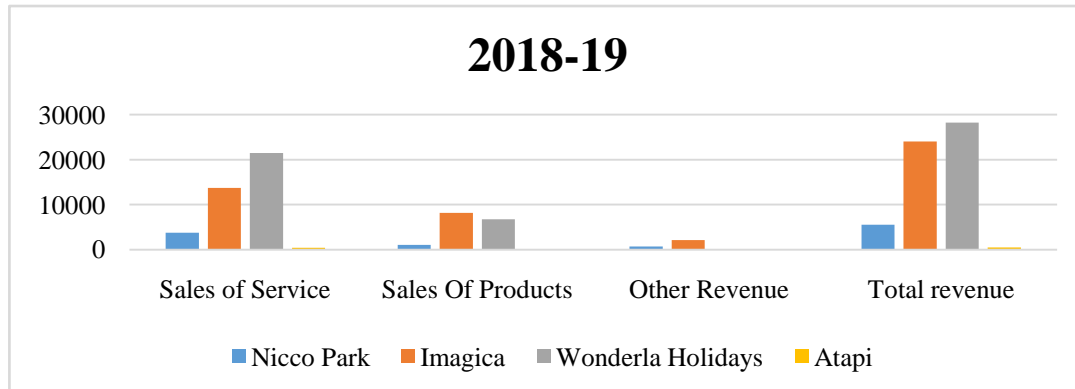
	Nicco Park	Wonderla	Imagica	Essel World	Aatapi
TICKET RATES & PRICING	Rs 300 per head (which includes 13 specified rides & attractions)	Normal Tickets: Rs. 999 Fastrack Tickets: Rs. 1499 (inclusive of GST)	Theme Park - 1499/ person Water Prk 999/ per person	Basic Package 290/ per adult Silver adult 885/ - access to all adult and family rides	Gold Package -900/ ; Silver package 350/

(V) Financial Comparison: Below is the revenue generation comparison. Data were collected from their individual website and Aatapi collected from Source

(Rs. In Lakhs)	Nicco Park		Imagica		Wonderla Holidays	Aatapi		
Statement of Revenues	FY 19-20	FY 18-19	FY 18-19	FY 17-18	FY 19-20	FY 18-19	FY 19-20	FY 18-19

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Sale of Services								
Entry Fees	967.13	965.75	11447.59	13008.31	19431.2	20249.47	1154.3771	403.154925
Room revenue			2262.99	2044.57	639.06	613.80	0	0.00
Rides,Games & Other Related Items	2611.79	2548.85						
License Fees	222.97	220.06						
Other Counter Collection					550.53	578.83		
	3801.89	3734.66	13710.58	15052.88	20620.79	21442.10	1154.3771	403.154925
Sale of Products								
Foods	579.39	623.99			3715.11	3831.38	217.4594	98.985925
Soft drinks,Ice creams	200.09	201.17	6363.68	5201.89	828.02	919.13		
Beverages	143.07	164.87						
Readymade Garments					1521.09	1615.79		
Souveneir & Other Items	14.77	11.25			383.03	372.67		
Construction Contract	9.00	41.11	1802.85	1983.65				
Components for Rides-Project	10.00	32.97						
	956.32	1075.36	8166.53	7185.54	6447.25	6738.97	217.4594	98.985925
Other Operating revenue								
Sponshorhip & Branding	79.68	71.83						
Technical Consultancy Fees	70	3.4						
Recerational Facility Income	518.03	634.79	341.69	265.85				
Income From Parking Fees	29.24	25.42	143.88	145.81				
income from Third Party Logistics Service			366.74	489.41				
Income from Lockers			240.87	182.94				
Misc. Income			1067.59	306.34	19.10	23.12		
	696.95	735.44	2160.77	1390.35	19.10	23.12		
Grand Total	5455.16	5545.46	24037.88	23628.77	27087.14	28204.19	1371.8365	502.14085
Annual Footfall	13.20	12.16	16.34	17.22		25.23	5.1026875	

Average Revenue Per User (APRU)			1474	1485				
			Q1 result Only					



Segmental analysis has been done from the available data, for 2018 - 19

THEME PARK CHALLENGES

It is evidenced from the above study, that all Theme parks are facing some of the challenges in different ways for attracting the guests and increase revenue. Till date, this sector is surviving on seasonal basis, which is one of the biggest challenge in any Theme Park which means the park planners need to plan facilities in a way that be whatever the season, the visitors experience in the park are optimal. Bundling of services, tie-ups with Govt. tourist packages should be encouraged so that parks get a constant flow and influx of visitors. So, capacity planning, minimize waiting time at the activities are the high on demand planning which few parks do, and few not. These areas should be taken into consideration at national level so that all parks maintain a standard operating procedure for these segments. Setting and establishing a Theme Park in Indian market is a tough job when finance goes in crores. Only big giants in this market can enter, as acquiring land is the issue, compliance needs to be made, and strict statutory regulations makes it more harder.

II. CONCLUSION

The present review study can be concluded that the comparative mapping for five different Amusement parks is beneficial to evaluate their impact on tourism sector as well as the gaps which are to be improved further for the advancement of Tourism sector. The present comparison study has been undertaken on few parameters like land area, quality of entertainments, the rides, costing and theme quality. The comparison of these parameters is useful to assess their theme park quality as well as deficiency. These features can be helpful in evaluating the impact of these parks on tourism sector. To attract the national and the international visitors, the amusement parks should also be spread all over India with the same standard of attractions all over.

This article finds few areas of improvement in the theme parks. There should be a *Collaboration Not Competition* among the Theme parks. Many practices should be interchanged and exchanged and switched over between different amusement parks of India who has the capacity of attracting national and international visitors. Amusement parks should also be taken up by Government to promote as they

significantly require public private cooperation. Understanding the roles of both the sectors is needed for the attractions, services, transportation and many more management policies of government. Government should initiate training at all the parks, expert exchange should be encouraged, and more stress should be given on- job training, classroom training at every level of the management. Senior officials of Theme parks should be encouraged to visit International Theme parks and get train on different segments of theme park. Attempt should be made to meet the tourists' demand, the family budget, the up gradations of attractions and a stable increase in figure for the Tourism sector.

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