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GLOBAL ATTRACTIONS ATTENDANCE REPORT
The definitive annual attendance study for the themed entertainment and museum industries.
Published by the Themed Entertainment Association (TEA) and the Economics practice at AECOM.
THE BIG PICTURE
A year of exceptional performance globally, with Asia leading the pack and a return of activity in the Middle East.

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<td>7 Top 20 water parks in North America</td>
<td>32–33</td>
</tr>
<tr>
<td>8 Top 10 water parks in Latin America</td>
<td>34–35</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td></td>
</tr>
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<td>9 Top 20 amusement/theme parks in Asia-Pacific</td>
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<td>44–45</td>
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<td>14 Top 20 museums in Asia-Pacific</td>
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How has the themed attraction industry performed this year?

We’ve seen healthy growth this year, with the major theme park operators posting 5.4 percent growth overall, and the top 25 theme parks growing at a similar rate of 4.3 percent. This is exceptional performance, particularly in view of the modest growth of major North American and European markets.

Where has the growth occurred?

Consistent with recent years, Asia has led the pack at 7.5 percent growth with the Americas growing in the 3 to 4 percent range. The Middle East is starting to pick up again with some major projects such as Warner Bros. Abu Dhabi underway. Europe’s overall growth has remained flat again, however there has been some light at the end of the tunnel with some strong performance in the U.K., Germany, and Denmark. Southern Europe remains under the burden of challenged economies.

How about Water Parks and Museums, how did they do?

Surprisingly well. Water parks grew at over 7 percent globally with some good numbers coming out of Asia, and increasingly Latin America with Beach Park in Brazil up 14 percent and in the top 20 water parks globally.

Museums had a strong year as well up over 7 percent from last year. The U.K. again performed well with a number of museums up 15 to 20 percent. The Asian museums were notably up also.
Are there any trends we should be paying attention to?

I believe there is a global rise in the importance of leisure as a driving influence in culture and economies. In the U.S., the leisure industry is now the number two producer of jobs in the private sector after health care. In China, India, and increasingly in Latin America, this industry is growing at a rapid rate as middle class markets emerge. And, barring major economic or social disruptions, this should continue into the future. Finally, as post-modern society in the West continues to change, as the immediacy of knowledge increases due to the internet, and as global militantism spreads, many traditional societal structures and securities are fraying creating uncertainty, and in some cases anxieties. Leisure and culture are, and will continue to be, a perfect antidote to these circumstances.

Any trends specific to attractions?

Yes. We’re seeing a new level of attention being paid to intellectual properties and international brands in our attractions. Many of the most successful new rides and shows are themed around popular media products, in addition to which many of the global media companies are actively pursuing major projects around the world. Notable examples are Fox’s new project in Malaysia, Warner Bros. in Abu Dhabi, and plans at Dreamworks for attractions based on their popular animated features. And then of course Disney and Universal continue to expand.

I think a final trend to keep an eye on is the transformation of theme parks into destination resorts by the addition of themed hotels, second and third gates, and retail, dining, and entertainment developments. This has a profound impact on the economics of these attractions. Europa Park is a great example of this transformation.

The final trend to keep an eye on is the transformation of theme parks into destination resorts.
TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE

Where are the top 25 amusement/theme parks worldwide?

4 parks
California, U.S.A.

7 parks
Florida, U.S.A.

5 parks
Europe

2 parks
South Korea

5 parks
Japan

VISITORS (MILLIONS)

- Up to 5 m
- 5 m–10 m
- 10 m–15 m
- 15 m+

Figure 2A

4.3%
2013–12 top 25 amusement/theme parks worldwide attendance growth

214.7 m
2013 top 25 amusement/theme parks worldwide attendance

205.9 m
2012 top 25 amusement/theme parks worldwide attendance
### TOP 25 THEME/AMUSEMENT PARKS WORLDWIDE

<table>
<thead>
<tr>
<th>PARK AND LOCATION</th>
<th>CHANGE</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 MAGIC KINGDOM at Walt Disney World, Lake Buena Vista, FL</td>
<td>6.0%</td>
<td>18,588,000</td>
<td>17,536,000</td>
</tr>
<tr>
<td>2 TOKYO DISNEYLAND, Tokyo, Japan</td>
<td>15.9%</td>
<td>17,214,000</td>
<td>14,847,000</td>
</tr>
<tr>
<td>3 DISNEYLAND, Anaheim, CA</td>
<td>1.5%</td>
<td>16,202,000</td>
<td>15,963,000</td>
</tr>
<tr>
<td>4 TOKYO DISNEY SEA, Tokyo, Japan</td>
<td>11.3%</td>
<td>14,084,000</td>
<td>12,656,000</td>
</tr>
<tr>
<td>5 EPCOT at Walt Disney World, Lake Buena Vista, FL</td>
<td>1.5%</td>
<td>11,229,000</td>
<td>11,063,000</td>
</tr>
<tr>
<td>6 DISNEYLAND PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France</td>
<td>-6.9%</td>
<td>10,430,000</td>
<td>11,200,000</td>
</tr>
<tr>
<td>7 DISNEY’S ANIMAL KINGDOM at Walt Disney World, Lake Buena Vista, FL</td>
<td>2.0%</td>
<td>10,198,000</td>
<td>9,998,000</td>
</tr>
<tr>
<td>8 DISNEY’S HOLLYWOOD STUDIOS at Walt Disney World, Lake Buena Vista, FL</td>
<td>2.0%</td>
<td>10,110,000</td>
<td>9,912,000</td>
</tr>
<tr>
<td>9 UNIVERSAL STUDIOS JAPAN, Osaka, Japan</td>
<td>4.1%</td>
<td>10,100,000</td>
<td>9,700,000</td>
</tr>
<tr>
<td>10 DISNEY’S CALIFORNIA ADVENTURE, Anaheim, CA</td>
<td>9.5%</td>
<td>8,514,000</td>
<td>7,775,000</td>
</tr>
<tr>
<td>11 ISLANDS OF ADVENTURE at Universal Orlando, FL</td>
<td>2.0%</td>
<td>8,141,000</td>
<td>7,981,000</td>
</tr>
<tr>
<td>12 OCEAN PARK, Hong Kong SAR</td>
<td>0.5%</td>
<td>7,475,000</td>
<td>7,436,000</td>
</tr>
<tr>
<td>13 HONG KONG DISNEYLAND, Hong Kong SAR</td>
<td>10.4%</td>
<td>7,400,000</td>
<td>6,700,000</td>
</tr>
<tr>
<td>14 LOTTE WORLD, Seoul, South Korea</td>
<td>15.9%</td>
<td>7,400,000</td>
<td>6,383,000</td>
</tr>
<tr>
<td>15 EVERLAND, Gyeonggi-Do, South Korea</td>
<td>6.6%</td>
<td>7,303,000</td>
<td>6,853,000</td>
</tr>
<tr>
<td>16 UNIVERSAL STUDIOS at Universal Orlando, FL</td>
<td>14.0%</td>
<td>7,062,000</td>
<td>6,195,000</td>
</tr>
<tr>
<td>17 UNIVERSAL STUDIOS HOLLYWOOD, Universal City, CA</td>
<td>4.0%</td>
<td>6,148,000</td>
<td>5,912,000</td>
</tr>
<tr>
<td>18 NAGASHIMA SPA LAND, Kuwana, Japan</td>
<td>-0.2%</td>
<td>5,840,000</td>
<td>5,850,000</td>
</tr>
<tr>
<td>19 SEAWORLD, Orlando, FL</td>
<td>+5.0%</td>
<td>5,090,000</td>
<td>5,358,000</td>
</tr>
<tr>
<td>20 EUROPA PARK, Rust, Germany</td>
<td>6.5%</td>
<td>4,900,000</td>
<td>4,600,000</td>
</tr>
<tr>
<td>21 WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France</td>
<td>-6.9%</td>
<td>4,470,000</td>
<td>4,800,000</td>
</tr>
<tr>
<td>22 SEAWORLD, San Diego, CA</td>
<td>-3.0%</td>
<td>4,311,000</td>
<td>4,444,000</td>
</tr>
<tr>
<td>23 TIVOLI GARDENS, Copenhagen, Denmark</td>
<td>4.1%</td>
<td>4,200,000</td>
<td>4,033,000</td>
</tr>
<tr>
<td>24 DE EFTELING, Kaatsheuvel, Netherlands</td>
<td>-1.2%</td>
<td>4,150,000</td>
<td>4,200,000</td>
</tr>
<tr>
<td>25 YOKOHAMA HAKKEIJIMA SEA PARADISE, Yokohama, Japan</td>
<td>2.4%</td>
<td>4,149,000</td>
<td>4,050,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4.3%</td>
<td>214,708,299</td>
<td>205,906,000</td>
</tr>
</tbody>
</table>

Figure 2B
Where are the top 20 water parks worldwide?

**Visitors (Millions)**
- Up to 1 m
- 1 m–2m
- 2 m+

**Figure 3A**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Park</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PARK</td>
<td>TEXAS, U.S.A.</td>
</tr>
<tr>
<td>2</td>
<td>PARK</td>
<td>FLORIDA, U.S.A.</td>
</tr>
<tr>
<td>3</td>
<td>PARK</td>
<td>COLOMBIA</td>
</tr>
<tr>
<td>4</td>
<td>PARKS</td>
<td>BRAZIL</td>
</tr>
<tr>
<td>5</td>
<td>PARK</td>
<td>THERMAL</td>
</tr>
<tr>
<td>6</td>
<td>PARK</td>
<td>U.A.E.</td>
</tr>
<tr>
<td>7</td>
<td>PARK</td>
<td>JAPAN</td>
</tr>
<tr>
<td>8</td>
<td>PARK</td>
<td>CHINA</td>
</tr>
<tr>
<td>9</td>
<td>PARK</td>
<td>SOUTH KOREA</td>
</tr>
<tr>
<td>10</td>
<td>PARK</td>
<td>HONG KONG</td>
</tr>
<tr>
<td>11</td>
<td>PARK</td>
<td>MALAYSIA</td>
</tr>
<tr>
<td>12</td>
<td>PARK</td>
<td>INDONESIA</td>
</tr>
<tr>
<td>13</td>
<td>PARK</td>
<td>AUSTRALIA</td>
</tr>
<tr>
<td>14</td>
<td>PARK</td>
<td>BRAZIL</td>
</tr>
<tr>
<td>15</td>
<td>PARK</td>
<td>BRITAIN</td>
</tr>
<tr>
<td>16</td>
<td>PARK</td>
<td>SPAIN</td>
</tr>
<tr>
<td>17</td>
<td>PARK</td>
<td>MEXICO</td>
</tr>
<tr>
<td>18</td>
<td>PARK</td>
<td>CHINA</td>
</tr>
<tr>
<td>19</td>
<td>PARK</td>
<td>INDONESIA</td>
</tr>
<tr>
<td>20</td>
<td>PARK</td>
<td>THERMAL</td>
</tr>
</tbody>
</table>
**TOP 20 WATER PARKS WORLDWIDE**

<table>
<thead>
<tr>
<th>PARK AND LOCATION</th>
<th>CHANGE</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 CHIMELONG WATERPARK, Guangzhou, China</td>
<td>7.5%</td>
<td>2,172,000</td>
<td>2,021,000</td>
</tr>
<tr>
<td>2 TYPHOON LAGOON AT DISNEY WORLD, Orlando, FL</td>
<td>2.0%</td>
<td>2,142,000</td>
<td>2,100,000</td>
</tr>
<tr>
<td>3 BLIZZARD BEACH AT DISNEY WORLD, Orlando, FL</td>
<td>2.0%</td>
<td>1,968,000</td>
<td>1,929,000</td>
</tr>
<tr>
<td>4 OCEAN WORLD, Gangwon-Do South Korea</td>
<td>-1.2%</td>
<td>1,700,000</td>
<td>1,720,000</td>
</tr>
<tr>
<td>5 THERMAS DOS LARANJAIS, Olimpia, Brazil</td>
<td>26.9%</td>
<td>1,650,000</td>
<td>1,300,000</td>
</tr>
<tr>
<td>6 CARIBBEAN BAY, Gyeonggi-Do, South Korea</td>
<td>7.6%</td>
<td>1,623,000</td>
<td>1,508,000</td>
</tr>
<tr>
<td>7 AQUATICA, Orlando, FL</td>
<td>1.0%</td>
<td>1,553,000</td>
<td>1,538,000</td>
</tr>
<tr>
<td>8 WET N WILD GOLD COAST, Australia</td>
<td>17.4%</td>
<td>1,409,000</td>
<td>1,200,000</td>
</tr>
<tr>
<td>9 WET ‘N WILD, Orlando, FL</td>
<td>1.0%</td>
<td>1,259,000</td>
<td>1,247,000</td>
</tr>
<tr>
<td>10 RESOM SPA CASTLE, Deoksan, South Korea</td>
<td>2.7%</td>
<td>1,189,000</td>
<td>1,158,000</td>
</tr>
<tr>
<td>11 AQUAVENTURE, Dubai, UAE</td>
<td>-7.7%</td>
<td>1,200,000</td>
<td>1,300,000</td>
</tr>
<tr>
<td>12 SUNWAY LAGOON, Kuala Lumpur, Malaysia</td>
<td>-8.3%</td>
<td>1,100,000</td>
<td>1,200,000</td>
</tr>
<tr>
<td>13 SHENYANG ROYAL HAWAII WATER PARK, Shenyang, China</td>
<td>10.0%</td>
<td>1,100,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>14 PISCILAGO, Girardo (Bogota), Colombia</td>
<td>0.2%</td>
<td>1,035,000</td>
<td>1,033,000</td>
</tr>
<tr>
<td>15 SCLITTERBAHN, New Braunfels, TX</td>
<td>1.0%</td>
<td>1,027,000</td>
<td>1,017,000</td>
</tr>
<tr>
<td>16 WOONGJIN PLAYDOCWATERDOCI, Gyeonggi-Do, South Korea</td>
<td>-0.6%</td>
<td>997,000</td>
<td>1,003,000</td>
</tr>
<tr>
<td>17 ATLANTIS WATER ADVENTURE, Jakarta, Indonesia</td>
<td>-2.0%</td>
<td>980,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>18 BEACH PARK, Aquiraz, Brazil</td>
<td>14.4%</td>
<td>964,000</td>
<td>843,000</td>
</tr>
<tr>
<td>19 SUMMERLAND, Tokyo, Japan</td>
<td>-5.2%</td>
<td>939,000</td>
<td>990,000</td>
</tr>
<tr>
<td>20 THE JUNGLE WATER ADVENTURE, Bogor, West Java</td>
<td>-7.5%</td>
<td>880,000</td>
<td>951,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>7.1%</strong></td>
<td><strong>26,887,000</strong></td>
<td><strong>25,100,000</strong></td>
</tr>
</tbody>
</table>
Where are the top 20 museums worldwide?

7.2%
2013–12 top 20 museums worldwide attendance growth

106.6 m
2013 top 20 museums worldwide attendance

98.5 m
2012 top 20 museums worldwide attendance
<table>
<thead>
<tr>
<th>MUSEUM AND LOCATION</th>
<th>CHANGE</th>
<th>2013</th>
<th>2012</th>
<th>ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  LOUVRE, Paris, France</td>
<td>-4.0%</td>
<td>9,334,000</td>
<td>9,720,000</td>
<td>PAID</td>
</tr>
<tr>
<td>2  NATIONAL MUSEUM OF NATURAL HISTORY, Washington DC</td>
<td>5.3%</td>
<td>8,000,000</td>
<td>7,800,000</td>
<td>FREE</td>
</tr>
<tr>
<td>3  NATIONAL MUSEUM OF CHINA, Beijing, China</td>
<td>38.7%</td>
<td>7,450,000</td>
<td>5,370,000</td>
<td>FREE</td>
</tr>
<tr>
<td>4  NATIONAL AIR AND SPACE MUSEUM, Washington DC</td>
<td>2.5%</td>
<td>6,970,000</td>
<td>6,800,000</td>
<td>FREE</td>
</tr>
<tr>
<td>5  BRITISH MUSEUM, London, U.K.</td>
<td>20.2%</td>
<td>6,701,000</td>
<td>5,576,000</td>
<td>FREE</td>
</tr>
<tr>
<td>6  THE METROPOLITAN MUSEUM OF ART, New York NY</td>
<td>2.7%</td>
<td>6,280,000</td>
<td>6,116,000</td>
<td>PAID</td>
</tr>
<tr>
<td>7  NATIONAL GALLERY, London, U.K.</td>
<td>16.8%</td>
<td>6,031,000</td>
<td>5,164,000</td>
<td>FREE</td>
</tr>
<tr>
<td>8  VATICAN MUSEUMS, Vatican</td>
<td>7.8%</td>
<td>5,459,000</td>
<td>5,065,000</td>
<td>PAID</td>
</tr>
<tr>
<td>9  NATURAL HISTORY MUSEUM, London, U.K.</td>
<td>6.4%</td>
<td>5,250,000</td>
<td>4,936,000</td>
<td>FREE</td>
</tr>
<tr>
<td>10 AMERICAN MUSEUM OF NATURAL HISTORY, New York</td>
<td>0.0%</td>
<td>5,000,000</td>
<td>5,000,000</td>
<td>PAID</td>
</tr>
<tr>
<td>11 NATIONAL MUSEUM OF AMERICAN HISTORY, Washington DC</td>
<td>2.1%</td>
<td>4,900,000</td>
<td>4,800,000</td>
<td>FREE</td>
</tr>
<tr>
<td>12 TATE MODERN, London, U.K.</td>
<td>-8.2%</td>
<td>4,885,000</td>
<td>5,319,000</td>
<td>FREE</td>
</tr>
<tr>
<td>13 NATIONAL PALACE MUSEUM (TAIWAN), Taipei, Taiwan</td>
<td>1.2%</td>
<td>4,412,000</td>
<td>4,361,000</td>
<td>PAID</td>
</tr>
<tr>
<td>14 NATIONAL GALLERY OF ART, Washington DC</td>
<td>-2.4%</td>
<td>4,100,000</td>
<td>4,200,000</td>
<td>FREE</td>
</tr>
<tr>
<td>15 CENTRE POMPIDOU, Paris, France</td>
<td>-1.4%</td>
<td>3,745,000</td>
<td>3,800,000</td>
<td>PAID</td>
</tr>
<tr>
<td>16 SHANGHAI SCIENCE &amp; TECHNOLOGY MUSEUM, Shanghai, China</td>
<td>11.5%</td>
<td>3,580,000</td>
<td>3,210,000</td>
<td>PAID</td>
</tr>
<tr>
<td>17 MUSEE D’ORSAY, Paris, France</td>
<td>-2.7%</td>
<td>3,482,000</td>
<td>3,579,000</td>
<td>PAID</td>
</tr>
<tr>
<td>18 NATIONAL MUSEUM OF NATURAL SCIENCE, Taichung, Taiwan</td>
<td>15.0%</td>
<td>3,396,000</td>
<td>2,954,000</td>
<td>PAID</td>
</tr>
<tr>
<td>19 SCIENCE MUSEUM (SOUTH KENSINGTON), London, U.K.</td>
<td>10.9%</td>
<td>3,317,000</td>
<td>2,990,000</td>
<td>FREE</td>
</tr>
<tr>
<td>20 VICTORIA &amp; ALBERT MUSEUM, London, U.K.</td>
<td>1.8%</td>
<td>3,290,000</td>
<td>3,232,000</td>
<td>FREE</td>
</tr>
</tbody>
</table>

| TOTAL | 7.2% | 105,582,000 | 96,486,000 |

Figure 4B
THE AMERICAS

Latin American water parks demonstrate potential; North American theme parks show maturity, resilience and growth

The 2013 North America theme park numbers reach beyond post-recession recovery to mark significant, historic growth.

The estimated 135.1 million visits to the top 20 parks equates to 3.6 million more visits, 2.7 percent higher than in 2012. This is the third consecutive year recently with this level of growth. A look behind these numbers reveals the competitive resilience of the themed entertainment industry and the opportunities for continued innovation and increases of revenue within a mature market. Technology, top media brands, increased international tourism and other contributing factors are discussed below.

The top 10 theme parks in Latin America had an estimated 13.7 million visits in 2013, which on a same-parks basis were up by about 500,000 visits or 3.8 percent versus 2012.

Water parks reveal a different dynamic. The top 20 water park market in North America declined 2.3 percent to 15.0 million visits for 2013. In Latin America, however, this sector is visibly emerging. For the first time the top 10 water parks in Latin America are broken out as a separate list in this study, showing 6.4 million visits. Continued growth and innovation are expected.

In addition to showing post-recession recovery, how do the 2013 North America theme park numbers look in a broader context?

2013 represents the fourth straight year of growth since the worst of the Great Recession. Looking back a full decade, those numbers are also up significantly. In 2013, the Top 20 theme parks in North America attracted 135.1 million visits; in 2004, 115.4 million visits. That’s an increase of 17 percent. By contrast, U.S. population grew about half as quickly, at 9 percent. Attendance at alternative leisure activities was stagnant or even declined. For example, Major League Baseball attendance grew only 1 percent, National Parks recreational visits declined by 1 percent, and movie theater ticket sales dropped 11 percent.

135.1 m
2013 top 20 theme/amusement parks North America attendance — an increase of 2.7% since 2012

13.7 m
2013 top 10 theme/amusement parks Latin America attendance — an increase of 3.8% since 2012

15.0 m
2013 top 20 water parks North America attendance — a decrease of 2.3% since 2012

6.4 m
2013 top 10 water parks Latin America attendance

Interview with Brian Sands
Vice President Economics, Americas
What are some keys to this resilience and growth?

I would stress five things:

- The ability to provide ever more compelling experiences due to creativity and technology.
- The power of branding.
- Shared experiences you can’t get at home.
- Smart reinvestment.
- Smart operations.

Technology also provides the means for hard rides and dark rides to become ever more sophisticated, unique and versatile. Examples include Cedar Point’s new Gatekeeper coaster, Six Flags Magic Mountain’s Full Throttle, and SeaWorld Florida’s Antarctica: Empire of the Penguins.

Every time the bar gets raised, the themed entertainment industry is there to meet and surpass it. Technology also becomes less expensive over time and brings high-end effects within the reach of more parks.

There is a virtuous cycle playing out here, where increasingly engaging films, television shows, games, and the like are supported by immersive real-world experiences that people want to visit, followed by positive reviews by them and industry watchers in traditional and social media, which drives more attendance as well as more movies and the like.

Another factor is the growth in season pass sales, which helps operators increase attendance during the shoulder periods, at the seasonal level and even at the daily level. Both Cedar Fair and Six Flags identified season passes as major drivers for growth in their attendance in 2013.

Growth in tourism also plays a major role. The number of person trips by U.S. residents for leisure purposes increased 11 percent from 2004 to 2013, and international arrivals increased an amazing 51 percent! Areas with major theme park concentrations, such as Orlando, Los Angeles, and even the Upper Midwest, are benefiting.

All major operators with significant operations in North Americas reported increased per capita revenues, some markedly. These increases were due to a combination of factors, including continuing improvements to the economy leading to greater visitor spending, ticket and other price increases, as well as growing up-charges for enhanced experiences and services. Potentially countering these were also increased use of season passes by some operators. However, most operators are aiming to increase in-park spending by visitors by increasing the sale of pre-paid packages and through the use of innovative technologies that alter visitors’ psychology and subsequent spending patterns — Disney’s MyMagic+ is the most visible example. As visitors increasingly make their largest payment before they arrive and have less need for historic forms of payment (i.e., cash, credit cards), per capita revenues should increase. These technologies may also allow for reduced queuing times at the entry gate and at individual rides.

In 2013, what parks experienced the strongest growth and why?

We estimate that the Magic Kingdom at Walt Disney World in Florida grew by nearly 6.0 percent, maintaining its position as the most visited theme park in the world with a total of 18.6 million visits. Driving this were the renovation and significant expansion of Fantastylan. This investment built strongly on Disney’s traditional focus on families with young children, leveraging recent movie and DVD releases.

The opening this year of Transformers™: The Ride 3-D at Universal Studios Florida pushed attendance up significantly to an estimated 7.1 million visits in 2013, an increase of 14.0 percent. Also contributing to growth at the park was the opening of a new Springfield area anchored by The Simpsons Ride.

All major operators with significant operations in North America reported increased per capita revenues, some markedly.
On the West Coast, attendance at Disney California Adventure increased in 2013 by 9.5 percent to reach an estimated 8.5 million visits, driven by the continued strong appeal of Cars Land. Neighboring Disneyland (whose Tiki Room celebrated its 50th anniversary in June 2013 and received TEA’s 2014 Thea Classic Award) bounced back a bit, to reach 16.2 million visits, an increase of 1.5 percent.

Helping all parks in the region was the continued strengthening of the economy and tourism in Southern California. However, in the global rankings, Disneyland has slipped to number three, behind Tokyo Disneyland.

Some of the regional theme parks in the U.S. also experienced good growth. Six Flags Great Adventure grew by 5.7 percent to reach 2.8 million due primarily to the absorption of the formerly separately ticketed adjacent safari park. Knott’s Berry Farm grew 5 percent to reach 3.7 million visits, with the opening of the new Boardwalk Pier area. Cedar Point grew 5 percent to nearly 3.4 million visits driven by the opening of The Gatekeeper. Two major new coasters at Six Flags Magic Mountain, Full Throttle and Superman: Escape From Krypton, were the forces behind an increase of 3.5 percent, pushing the park up to 2.9 million visits.

Two parks experienced declines in 2013, with Mundo Petapa in Guatemala City declining to under 1.1 million visits and Parque de la Costa in Tigre, Argentina to 1.05 million visits, with the latter due to bad weather during the winter holidays.

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TOP 20 THEME/AMUSEMENT PARKS NORTH AMERICA

Where are the top 20 theme/amusement parks in North America?

Figure 5B

Figure 5A

VISITORS (MILLIONS)

Up to 5 m
5 m–10 m
10 m–15 m
15 m+

Figure 5A

2.7 %

2013–12 top 20 theme/amusement parks North America amusement growth

135.1 m

2013 top 20 theme/amusement parks North America attendance

131.5 m

2012 top 20 theme/amusement parks North America attendance
### Top 10 Theme/Amusement Parks Latin America

Where are the top 10 theme/amusement parks in Latin America?

<table>
<thead>
<tr>
<th>Park and Location</th>
<th>2013 Change</th>
<th>2013 Attendance</th>
<th>2012 Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIX FLAGS MEXICO, Mexico City, Mexico</td>
<td>1.5%</td>
<td>2,345,000</td>
<td>2,310,000</td>
</tr>
<tr>
<td>HOPI HARI, São Paulo, Brazil</td>
<td>3.5%</td>
<td>1,885,000</td>
<td>1,628,000</td>
</tr>
<tr>
<td>LA FERIA DE CHAPULTEPEC, Mexico City, Mexico</td>
<td>0.0%</td>
<td>1,537,000</td>
<td>1,537,000</td>
</tr>
<tr>
<td>BETO CARRERO WORLD, Santa Catarina, Brazil</td>
<td>2.0%</td>
<td>1,530,000</td>
<td>1,500,000</td>
</tr>
<tr>
<td>PLAZA DE SESAMO, Monterrey, Mexico</td>
<td>1.0%</td>
<td>1,209,000</td>
<td>1,197,000</td>
</tr>
<tr>
<td>PARQUE MUNDO AVENTURA, Bogota, Colombia</td>
<td>8.2%</td>
<td>1,152,000</td>
<td>1,065,000</td>
</tr>
<tr>
<td>FANTASIALANDIA, Santiago, Chile</td>
<td>1.5%</td>
<td>1,086,000</td>
<td>1,070,000</td>
</tr>
<tr>
<td>MUNDO PETAPA, Guatemala City, Guatemala</td>
<td>-15.7%</td>
<td>1,056,000</td>
<td>1,253,000</td>
</tr>
<tr>
<td>EL SALITRE MAGICO, Bogota, Colombia</td>
<td>10.0%</td>
<td>1,054,000</td>
<td>956,000</td>
</tr>
<tr>
<td>PARQUE DE LA COSTA, Tigre, Argentina</td>
<td>-3.8%</td>
<td>1,050,000</td>
<td>1,091,000</td>
</tr>
</tbody>
</table>

**Total Change:** 3.8% | 13,704,000 | 13,199,000

**Visitors (Millions):**
- Up to 5 m
- 5 m–10 m
- 10 m–15 m
- 15 m+

**Figures:**
- **Figure 6A:** Where are the top 10 theme/amusement parks in Latin America?
- **Figure 6B:** 2013–12 top 10 theme/amusement parks Latin America attendance growth.
TOP 20 WATER PARKS
NORTH AMERICA

Where are the top 20 water parks in North America?

1. DISNEY'S TYPHOON LAGOON AT DISNEY WORLD, Orlando, FL
   - Change: 2.0%
   - 2012: 1,929,000
   - 2013: 2,142,000

2. DISNEY'S BLIZZARD BEACH AT DISNEY WORLD, Orlando, FL
   - Change: 2.0%
   - 2012: 1,929,000
   - 2013: 2,142,000

3. AQUATICA, Orlando, FL
   - Change: 1.0%
   - 2012: 1,538,000
   - 2013: 1,553,000

4. WET 'N' WILD, Orlando, FL
   - Change: 1.0%
   - 2012: 1,247,000
   - 2013: 1,259,000

5. SCHLITTERBAHN, New Braunfels, TX
   - Change: 1.0%
   - 2012: 1,017,000
   - 2013: 1,027,000

6. WATER COUNTRY USA, Williamsburg, VA
   - Change: -2.9%
   - 2012: 748,000
   - 2013: 726,000

7. ADVENTURE ISLAND, Tampa, FL
   - Change: -2.0%
   - 2012: 651,000
   - 2013: 638,000

8. SCHLITTERBAHN, Galveston, TX
   - Change: 0.0%
   - 2012: 546,000
   - 2013: 546,000

9. HYLAND HILLS WATER WORLD, Denver, CO
   - Change: 0.0%
   - 2012: 538,000
   - 2013: 538,000

10. SIX FLAGS-HURRICANE HARBOR, Arlington, TX
    - Change: 2.0%
    - 2012: 508,000
    - 2013: 518,000

11. SIX FLAGS-WHITE WATER, Marietta, GA
    - Change: 0.0%
    - 2012: 505,000
    - 2013: 505,000

12. WET 'N' WILD, Phoenix, AZ
    - Change: 2.4%
    - 2012: 461,000
    - 2013: 472,000

13. SIX FLAGS HURRICANE HARBOR, Jackson, NJ
    - Change: 1.9%
    - 2012: 424,000
    - 2013: 432,000

14. RAGING WATERS, San Dimas, CA
    - Change: -5.6%
    - 2012: 448,000
    - 2013: 423,000

15. SPLISH-SPASH, Riverhead, NY
    - Change: -5.5%
    - 2012: 435,000
    - 2013: 411,000

16. WET 'N' WILD EMERALD POINT, Greensboro, NC
    - Change: -2.0%
    - 2012: 406,000
    - 2013: 398,000

17. SOAK CITY CEDAR POINT, Sandusky, OH
    - Change: -6.0%
    - 2012: 403,000
    - 2013: 379,000

18. KNOTT'S SOAK CITY USA, Buena Park, CA
    - Change: 5.1%
    - 2012: 350,000
    - 2013: 368,000

19. CAMELBEACH, Tannersville, PA
    - Change: 0.0%
    - 2012: 367,000
    - 2013: 367,000

20. ZOOMEZI BAY, Powell, OH
    - Change: -7.5%
    - 2012: 389,000
    - 2013: 360,000

TOTAL
-2.3%

2013–12 top 20 water parks North America attendance growth

15.0 m
2013 top 20 water parks North America attendance

15.4 m
2012 top 20 water parks North America attendance
Where are the top 10 water parks in Latin America?

**TOP 10 WATER PARKS**
**LATIN AMERICA**

1. **THERMAS DOS LARANJAS**, Olimpia, Brazil - 1,650,000
2. **PISCILAGO**, Girardo (Bogota), Colombia - 1,035,000
3. **BEACH PARK**, Aquiraz, Brazil - 964,000
4. **PARQUE ACUATICO XOCOMIL**, San Martin Zapotitlán, Retalhuleu, Guatemala - 786,000
5. **BAHAMAS AQUAVENTURE WATER PARK**, Paradise Island, Bahamas - 450,000
6. **WET 'N WILD SAO PAULO**, São Paulo, Brazil - 395,000
7. **RIO WATER PLANET**, Rio de Janeiro, Brazil - 350,000
8. **PARQUE ACUATICO EL ROLLO**, Morelos, Mexico - 300,000
9. **WET 'N WILD**, Cancun, Mexico - 250,000
10. **HOT PARK RIO QUENTE**, Caldas Novas, Brazil - 250,000

**TOTAL** - 6,430,000

**VISITORS (MILLIONS)**
- Up to 1 m
- 1 m–2 m
- 2 m+

**Figure 8B**

**6.4 m**
2013 top 10 water parks
Latin America attendance
2013 was a very strong year overall for theme parks and water parks in Asia.

The top theme parks had a combined attendance increase of 7.5 percent. Water parks came in at a 6 percent increase — well above 2012 levels. As the Asian entertainment sector continues to accelerate and take shape, individual parks and chains are moving up the ranks, and trends are distinguishing themselves.

The largest parks keep getting bigger, investing and expanding with new themed lands, anniversary celebrations and attractions. Fantawild Group appears on the list of top global theme park operators for the first time. Fantawild is the third Chinese company to enter the global chain list, joining OCT and Haichang Group. There is much anticipation for big new parks and attractions coming online in the next few years, such as the Harry Potter land at Universal Osaka, and Shanghai Disneyland, which will positively affect the rest of the market. Within the industry, the expectation is that these high-end major parks and attractions will raise market expectations and result in quality standards for this type of facility across the region.

In keeping with the steady ascendancy of Asia’s themed entertainment sector, the industry has also become more organized and active on a professional level within Asia: IAAPA’s Asia Attractions Expo regularly sells out its exhibit floor space, and TEA has a growing presence through its Asia Pacific Division. Also more operators are actively taking part in this Theme Index study, cooperating and sharing information with researchers.

Asia’s market keeps growing and will continue to grow organically as the regional economies grow and more people achieve middle class status. As people have more discretionary income, they look for family leisure offerings, and this motivates growth and improvement in the entertainment sector. It’s a positive cycle where parks and park developers realize that if they make the investment, they will reap the rewards.

Interviews with Chris Yoshii, Vice President Economics, Asia-Pacific

Beth Chang, Regional Director Economics, Asia-Pacific
Tell us about the new Asian arrivals on the global charts.

Fantawild is number 9 on the Top 10 worldwide operators list after opening three new properties between 2012–2013, yet none of its facilities appear on the top-attended lists. This is due to their focusing on smaller parks in second- and third-tier cities. The individual properties are not massive scale, but they add up significantly.

Seoulland made it to the Top 20 Theme/Amusement Parks Worldwide list for the first time, thanks to an attendance increase of 8 percent that brought its 2013 total to 2,300,000. Celebrating its 25th anniversary, Seoulland made many improvements and investments. Attractions were renovated with themes based on popular TV and video game characters. The theming was further enhanced with new parades and live performances featuring these characters. A new nighttime spectacular show was also introduced.

Tell us about the parks showing the biggest increases in attendance.

The five parks with the greatest attendance increases (Tokyo Disneyland at 15.9 percent, Tokyo Disney Sea at 11.3 percent, Hong Kong Disneyland at 10.4 percent, Lotte World at 15.9 percent, and Seoulland at 8 percent) all added attractions and underwent expansions and/or renovations. Some were also celebrating milestones. Seoulland’s 25th anniversary was the occasion for many upgrades, as already mentioned. Lotte World installed six new attractions in 2013, and expanded its “Underland” zone by about 6,200 square meters. It also boosted its social media marketing.

Tokyo Disneyland introduced a new parade and a new attraction for its 30 year anniversary. The occasion, aided by good weather and an increase in domestic tourism, helped fuel big attendance jumps at both of Japan’s Disney parks. At Hong Kong Disneyland, increases can be credited to expansion, strong marketing, effective management strategies and healthy tourism growth. The park’s Mystic Point zone opened in May 2013, marking the completion of an expansion begun in 2009, which increased the park’s total size by 25 percent and brought the total number of attractions and entertainment offerings to more than 100.

In new parks, all eyes are of course on Shanghai, as the much-anticipated 2015 opening of Shanghai Disneyland approaches.

What will the next significant stage of growth look like in Asian theme parks?

In existing parks, Lotte World and Universal Studios Japan can be expected to post big increases for 2014. Lotte World is celebrating its 25th anniversary, and unveiling two more attractions and renovating its nighttime parade. Universal Studios Japan will debut its new Harry Potter themed land this summer. Chimelong Group opened their new destination theme park and resort Ocean Kingdom in Zhuhai, China receiving huge crowds to the theme park as well as their 1,888 room hotel.

In new parks, all eyes are of course on Shanghai, as the much-anticipated late 2015 opening of Shanghai Disneyland approaches. Its attendance numbers are expected to significantly rearrange the numbers on this annual Theme Index in 2016, after the new park has been open for a full year. This would instantly propel Shanghai Disney into the top five parks in Asia, with China topping the list for the first time.

It has been widely announced in recent news that anticipating the need for more capacity than was originally forecast, Shanghai Disneyland’s developers have significantly increased the project budget. Their decision was triggered by research — monitoring trends, market growth, and customer feedback. From what we understand, the development process is going reasonably well and is on track. A huge effort has been mounted to get the park open, with literally a million details to address. This park will feature some of the industry’s most advanced rides and attractions, and both Disney and the China investors perceive the need to get it right.
The park’s new Constrictor water slide, introduced in Sept 2012, was ranked fourth best in the world by the Travel Channel. Wet ‘n’ Wild also benefited from favorable weather and strong VIP sales.

Do Asian park operators embrace branding to the extent we’re seeing in North America and Europe?

The licensing of IPs for theme park attractions is definitely a late coming trend in Asia. There is a cost to bring in IP, and locally owned parks are evaluating if it is worth the cost. Looking ahead, developers will manifest an increasing interest in using international IPs in theme parks. And we’re already seeing major IP groups active in the market in Asia: Fox, Paramount, Warner Bros. and Dreamworks all very much so. Fox World in Malaysia is a complete redevelopment of an existing park, but most other projects in the works are new-built, and they are for the most part structured with a local developer as the investor and owner, with the IP owner retaining a level of control over design and other aspects.

Going a different direction, away from international brands, some of the new parks are really trying to promote Chinese culture and stories and themes. We’ll continue to see a very diverse range of attractions and a wide mix of different themes. Unlike the U.S. where there was a push to create a standard, in Asia there’s a lot of variety and experimentation. What we are seeing is that some developers will go international, and others will focus on local culture, themes and stories.

The Top 15 list of water parks includes three new entries that completed their first full year of operation in 2013.

Chimelong water park in Guangzhou tops the list of Top 20 Water Parks Worldwide as well as the Top 15 Water Parks in Asia. Tell us about that, and about growth in this sector.

As mentioned previously, overall attendance reflects strong growth in 2013, at around 6 percent. Chimelong remains number one, having had a 7.5 percent increase in attendance. Scenes from the Chinese blockbuster movie “Dad, Where are We Going?” were shot at the facility, providing great publicity and boosting its reputation. In terms of reinvesting in the guest experience, Chimelong’s outdoor heated water system was extended to cover almost the whole park. The opening of the Zhuhai Chimelong Ocean Kingdom Resort also greatly enhanced Chimelong’s brand recognition and popularity.

There are a lot of new water parks opening up in Asia, and that’s reflected on the charts. We expect this list to continue to evolve as there is huge growth in this area and room for a lot more. Water parks are an easier venture than theme parks as they incur lower capital costs and a smaller footprint. The Top 15 list includes three new entries in the market that completed their first full year of operation in 2013: Playamaya Water Park (Wuhan), Adventure Cove (Singapore) and Bali Water Park (Fushun). There are also two existing parks that appear on the Top 15 list for the first time in the 2013 report: Woongjin Playdoci Waterdoci, an indoor-only water park in Korea, and Royal Hawaii Water Park (Shenyang, China).

In Australia, Wet ‘n’ Wild Gold Coast, number 4 on the Top 15 list, posted an attendance increase of 17.4 percent.

The park’s new Constrictor water slide, introduced in Sept 2012, was ranked fourth best in the world by the Travel Channel. Wet ‘n’ Wild also benefited from favorable weather and strong VIP sales.

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There is huge growth in the number of water parks in Asia and room for a lot more.
TOP 20 THEME/AMUSEMENT PARKS
ASIA-PACIFIC

Where are the top 20 theme/amusement parks in Asia-Pacific?

1 PARK
SINGAPORE

2 PARKS
HONG KONG

3 PARKS
SOUTH KOREA

9 PARKS
CHINA

PARK AND LOCATION                CHANGE 2013       2012
1 TOKYO DISNEYLAND, Tokyo, Japan   15.9%       17,213,900   14,847,000
2 TOKYO DISNEY SEA, Tokyo, Japan   11.3%       14,084,100   12,656,000
3 UNIVERSAL STUDIOS JAPAN, Osaka, Japan 4.1%   10,100,000   9,700,000
4 OCEAN PARK, Hong Kong SAR       0.5%        7,475,000    7,436,000
5 HONG KONG DISNEYLAND, Hong Kong SAR 10.4%  7,400,000   6,700,000
6 LOTTE WORLD, Seoul, South Korea   15.9%       7,400,000   6,383,000
7 EVERLAND, Gyeonggi-do, South Korea 6.6%   7,303,000   6,853,000
8 NAGASHIMA SPA LAND, Kuwana, Japan  -0.2%    5,840,000   5,850,000
9 YOKOHAMA HAKKEIJIMA SEA PARADISE, Yokohama, Japan 2.4%   4,149,000   4,050,000
10 SONGCHENG PARK, Hangzhou, China  7.9%        4,100,000   3,800,000
11 OCT EAST, Shenzhen, China      -5.9%      3,950,000   4,196,000
12 UNIVERSAL STUDIOS SINGAPORE, Singapore 4.9%   3,850,000   3,480,000
13 CHANGZHOU DINOSAUR PARK, Changzhou, China 5.9%   3,600,000   3,400,000
14 HAPPY VALLEY, Shenzhen, China   2.1%        3,280,000   3,212,000
15 WINDOW OF THE WORLD, Shenzhen, China 2.5%   3,250,000   3,170,000
16 CHIMELONG PARADISE, Guangzhou, China 7.7%   3,200,000   2,970,000
17 HAPPY VALLEY, Beijing, China    1.5%        3,100,000   3,055,000
18 ZHENZHOU FANTAWILD ADVENTURE, Zhenzhou, China (new) NA   2,850,000   NA
19 HAPPY VALLEY, Chengdu, China    4.7%        2,560,000   2,445,000
20 SEOULLAND, Gyeonggi-do, South Korea 8.0%   2,300,000   2,130,000
TOTAL                               7.5%        116,805,000 108,689,000

7.5%  2013–12 top 20 theme/amusement parks Asia-Pacific attendance growth
116.8 m  2013 top 20 theme/amusement parks Asia-Pacific attendance
108.7 m  2012 top 20 theme/amusement parks Asia-Pacific attendance

Visitors (Millions)

- Up to 5m
- 5m–10m
- 10m–15m
- 15m+

Figure 9A

Figure 9B

2013–12 top 20 theme/amusement parks Asia-Pacific attendance growth
2013 top 20 theme/amusement parks Asia-Pacific attendance
2012 top 20 theme/amusement parks Asia-Pacific attendance
### Top 15 Water Parks Asia-Pacific

**Table:**

<table>
<thead>
<tr>
<th>Park and Location</th>
<th>Change</th>
<th>2013</th>
<th>2012</th>
</tr>
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<tbody>
<tr>
<td>Chimelong Waterpark, Guangzhou, China</td>
<td>7.5%</td>
<td>2,172,000</td>
<td>2,021,000</td>
</tr>
<tr>
<td>Ocean World, Gangwon-Do, South Korea</td>
<td>-1.2%</td>
<td>1,700,000</td>
<td>1,720,000</td>
</tr>
<tr>
<td>Caribbean Bay, Gyeonggi-Do, South Korea</td>
<td>7.6%</td>
<td>1,623,000</td>
<td>1,508,000</td>
</tr>
<tr>
<td>Wet ‘N’ Wild Gold Coast, Australia</td>
<td>17.4%</td>
<td>1,409,000</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Resom Spa Castle, Deoksan, South Korea</td>
<td>2.7%</td>
<td>1,189,000</td>
<td>1,158,000</td>
</tr>
<tr>
<td>Royal Hawaii Waterpark, Fushun, China</td>
<td>10.0%</td>
<td>1,100,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Sunway Lagoon, Kuala Lumpur, Malaysia</td>
<td>-8.3%</td>
<td>1,100,000</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Woongjin Playdoci Waterdoci, Gyeonggi-Do, South Korea</td>
<td>-0.6%</td>
<td>997,000</td>
<td>1,003,000</td>
</tr>
<tr>
<td>Atlantis Water Adventure, Jakarta, Indonesia</td>
<td>-2.0%</td>
<td>980,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Summerland, Tokyo, Japan</td>
<td>-5.2%</td>
<td>939,000</td>
<td>990,000</td>
</tr>
<tr>
<td>The Jungle Water Adventure, Bogor, West Java</td>
<td>-7.5%</td>
<td>880,000</td>
<td>951,000</td>
</tr>
<tr>
<td>Ocean Park Water Adventure, Jakarta, Indonesia</td>
<td>8.7%</td>
<td>800,000</td>
<td>750,000</td>
</tr>
<tr>
<td>Playamaya Water Park, Wuhan, China (new)</td>
<td>NA</td>
<td>740,000</td>
<td>NA</td>
</tr>
<tr>
<td>Resom Ocean Castle, Chungcheongnam-Do, South Korea</td>
<td>7.4%</td>
<td>685,000</td>
<td>638,000</td>
</tr>
<tr>
<td>Adventure Cove Waterpark, Singapore (new)</td>
<td>NA</td>
<td>648,000</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>6.0%</td>
<td>16,962,000</td>
<td>15,999,000</td>
</tr>
</tbody>
</table>

**Figure 10A:**
- **Visitors (Millions):**
  - Up to 1m
  - 1m–2m
  - 2m+

**Figure 10B:**
- **Top 15 Water Parks Asia-Pacific:**
  - 1 park in Japan
  - 5 parks in South Korea
  - 3 parks in China
  - 3 parks in Indonesia
  - 1 park in Singapore
  - 1 park in Australia
  - 3 parks in Malaysia
  - 4 parks in Indonesia

**Figure 10C:**
- **2013–12 Top 15 Water Parks Asia-Pacific Attendance:**
  - 6.0%
  - 17.0m
  - 16.0m

**Figure 10D:**
- **2013 Top 15 Water Parks Asia-Pacific:**
  - 2013–12 Top 15 Water Parks Asia-Pacific Attendance.
Overall attendance performance at European theme parks was mixed in 2013, giving rise to yet another static year for the top 20 parks.

Despite hefty investment by a number of parks during the winter preceding the start of the 2013 season, the overall picture displays an aggregate stabilized attendance figure of 58 million visitors.

This year there is a clear divide between the performance of North European parks and South European parks. The former were in a better position largely due to a strengthening economy and good weather. The U.K. tourism sector had a fantastic year. But in Southern Europe, parks were prevented from reaching their full potential due to the challenging economic situation (tax increases, salary cuts, job cuts, euro uncertainty). In addition there was a tax increase of 13 percent in Spain.

Following a period of construction stagnation post-recession, we are witnessing the return of an appetite for development across a wide range of land uses in the Middle East, particularly the UAE. Dubai’s having been approved to host the 2020 World Expo is also triggering a new wave of development.

Another emerging economy to watch is Russia.

What are European theme parks doing to stay solvent and competitive in continued tough times?

While awaiting increases in leisure spending that are forecast in Europe in the medium term, many are adopting a prudent approach to business activity, focusing on marketing strategies, limited capital expenditures (CapEx) and ways to boost visitors’ per capita spending. Parks with limited means are choosing to invest in shows or soft programming in order to maintain low CapEx. Disney, for example, has invested in nighttime shows at its Paris-based attractions. These attractions add to the appeal of the resort and extend the visitors’ day, with the end aim of increasing visitation while limiting costs.

In Europe, full economic recovery is still elusive. In the Middle East, the pace starts to pick up again.
What kinds of reinvestment/upgrades are paying off for European theme parks?

The current European theme park market is characterized by new openings in Eastern Europe and a focus on innovations in Western Europe, the latter characterized by expansions and second gates at strong-performing parks. The aim here is to turn standalone theme parks into destination resorts by offering visitors the ability to stay longer at their facilities with the construction of new hotels to encourage overnight stays. This trend is further accentuated by the continuation of the staycation trend, which favors short breaks over lengthy holidays. Destination resorts inclusive of a wide range of attractions are positioned to capitalize on this.

Reinvestment has also focused on low-cost measures, such as new shows or soft programming. Thorpe Park did not deliver a major new ride in 2013, instead concentrating on extending its day by organizing evening events during the summer months and successful Ministry of Sound clubbing nights. The park also introduced a new mobile ticketing service and various social media initiatives.

Poor weather is often to blame for dips in theme park attendance, and perhaps as a result of a more prudent way of thinking post-recession, some parks are beginning to think of innovative ways to overcome the issue. By balancing indoor and outdoor activities, attractions are able to maintain a more stable trading performance throughout the year. Diversification of an operator’s portfolio of parks across a wide geographical spread also serves to mitigate some of the risks caused by extreme weather for larger operators. Moreover, encouraging pre-booking and targeted promotions is a core strategy utilized by Merlin as a way to offset the impact of poor weather conditions on attendance.

Converse to what one might expect, Europa Park’s new winter opening season proved to be a huge magnet for visitation. Winter opening became a stimulus for growth with close to 500,000 visitors entering the park in this period alone. The proportion of first-time visitors was actually higher in winter than in summer in 2013.

Reinvestment has also focused on low-cost measures, such as new shows or soft programming. Attractions are also undertaking intensive market research in order to further understand their visitors. This helps ensure perceived value for money and triggers project reviews. Merlin’s ability to diversify risk by operating businesses in a large number of countries serves to offset overall swings in attendance. Over-reliance on a particular market segment or country can expose operators to economic fluctuations to a far greater extent.

Some parks had big attendance jumps. What did they do to accomplish this?

Merlin Entertainments, operator of just over one-third of the top 20 European parks, performed extremely well in 2013. The operator’s U.K. parks performed particularly well. Key drivers behind this are the transformation of standalone theme parks into destination resorts, continued capital investment in new attractions and the exploitation of synergies between attractions. Chessington World of Adventures enjoyed a bumper year, with attendance increasing by more than 15 percent to 1.5 million visitors. The primary driver behind this was the addition of ‘Zufari — Ride into Africa,’ an off-road safari trail.

Show-based theme park Puy du Fou continues to make waves in the European market, witnessing another year of strong growth recorded at almost nine percent. Increased occupancy at on-site hotels boosted attendance significantly. Puy du Fou has also benefited from strong publicity and heightened international awareness of the park’s unique concept and relatively modest price structure. It seems that people have a strong appetite for a park very much differentiated from the crowd!

Merlin’s ability to diversify risk by operating businesses in a large number of countries serves to offset overall swings in attendance.

<table>
<thead>
<tr>
<th>Park</th>
<th>Attendance Growth 2013–2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chessington World of Adventures, U.K.</td>
<td>15.4%</td>
</tr>
<tr>
<td>Thorpe Park, U.K.</td>
<td>11.1%</td>
</tr>
<tr>
<td>Europa Park, Germany</td>
<td>6.5%</td>
</tr>
</tbody>
</table>
A particularly interesting change in this year’s report is the replacement of Walt Disney Studios Park with Europa Park as the second most-visited theme park in Europe.

A particularly interesting change in this year’s report is the replacement of Walt Disney Studios Park with Europa Park as the second most-visited theme park in Europe.

As is the case in North America, branding is also a huge trend at European attractions. Leading brands are increasingly becoming affiliated with attractions, be it on a park-wide scale (as per Ferrari World in Abu Dhabi and Angry Birds in Finland), a ride-based scale or a strategic partnership for marketing purposes. Merlin Entertainments this year took out a new strategic partnership with Kellogg’s, offering discount vouchers to their attractions on the back of cereal packets. This is just one of many key brands linked to Merlin-operated attractions. Companies are able to sponsor events, experiences, rides, soft programming and even hotel rooms.

What is the significance of Europa Park’s number two position on the chart for 2013?

A particularly interesting change in this year’s report is the replacement of Walt Disney Studios Park with Europa Park as the second most-visited theme park in Europe. Having experienced consistent growth in attendance over the last five years, the combined figure for the two Disney parks slipped back to a level not seen since 2007. Continuous economic slowdown in France and Southern Europe is reputedly to blame, with visitation from these areas in particular being down from previous years. Over 100,000 fewer room nights were sold at Disney Village in 2013, reducing occupancy rates and hence attendance figures into the resort. In addition to this, the Disney parks are undergoing a period of refinacing in order to decrease their debt burden. The negative implication of this is their inability to reinvest heavily in new rides, often key to an established attractions’ continuing appeal. However, we understand construction is currently well-underway for a dark ride based on Pixar’s ‘Ratatouille,’ which is scheduled to open at Walt Disney Studios Park in mid-2014.

Tell us about the resurgence of attraction development and planning in the UAE, and the emergence of Russia as a theme park market.

Pre-recession plans such as Dubai Land are coming back to life, with perhaps more compatible concepts and realistic proportions than before. Visitor attraction development in the UAE is likely to be more tourist-oriented, with less attendance projected or expected from the resident population.

In Russia, mega projects, often with ambitious concepts, have long been on the radar but were stalled by the recession. Although nothing has opened as of yet, a balancing of realism and ambition is beginning to prevail and operators are starting to seek out local partners. A number of predominantly indoor attractions are currently in the pipeline, including Moscow Ocean Park and Sochi Park. Since international visitation will be somewhat constrained by visa issues, we expect demand to be driven by the local resident market.

How is the trend toward IPs and branding expressed in Europe and Middle East theme parks?

As is the case in North America, branding is also a huge trend at European attractions. Leading brands are increasingly becoming affiliated with attractions, be it on a park-wide scale (as per Ferrari World in Abu Dhabi and Angry Birds in Finland), a ride-based scale or a strategic partnership for marketing purposes. Merlin Entertainments this year took out a new strategic partnership with Kellogg’s, offering discount vouchers to their attractions on the back of cereal packets. This is just one of many key brands linked to Merlin-operated attractions. Companies are able to sponsor events, experiences, rides, soft programming and even hotel rooms.

Until recently, the Mack family who own Europa Park in Germany, invented their own characters for each area themed around countries in the European Union. However, the park welcomed Arthur and the Invisibles into the attraction mix this year to specifically target French visitors — their fastest growing visitor segment in recent years.
### Top 20 Theme/Amusement Parks in Europe

**Where are the top 20 theme/amusement parks in Europe?**

<table>
<thead>
<tr>
<th>PARK AND LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 DISNEYLAND PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France</td>
</tr>
<tr>
<td>2 EUROPA PARK, Rust, Germany</td>
</tr>
<tr>
<td>3 WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France</td>
</tr>
<tr>
<td>4 TIVOLI GARDENS, Copenhagen, Denmark</td>
</tr>
<tr>
<td>5 DE EFTELING, Kaatsheuvel, Netherlands</td>
</tr>
<tr>
<td>6 PORTAVENTURA, Salou, Spain</td>
</tr>
<tr>
<td>7 LISEBERG, Gothenburg, Sweden</td>
</tr>
<tr>
<td>8 GARDALAND, Castelnuovo del Garda, Italy</td>
</tr>
<tr>
<td>9 LEGOLAND WINDSOR, Windsor, England</td>
</tr>
<tr>
<td>10 THORPE PARK, Chertsey, England</td>
</tr>
<tr>
<td>11 LEGOLAND BILLUND, Billund, Denmark</td>
</tr>
<tr>
<td>12 PHANTASIALAND, Brühl, Germany</td>
</tr>
<tr>
<td>13 PUY DU FOU, Les Epesses, France</td>
</tr>
<tr>
<td>14 PARC ASTERIX, Plailly, France</td>
</tr>
<tr>
<td>15 GRONALUND, Stockholm, Sweden</td>
</tr>
<tr>
<td>16 CHESSINGTON WORLD OF ADVENTURES, Chessington, U.K.</td>
</tr>
<tr>
<td>17 FUTUROSCOPE, Saumur, France</td>
</tr>
<tr>
<td>18 HEIDE PARK, Soltau, Germany</td>
</tr>
<tr>
<td>19 DUINRELL/ATTRAKTIEPARK, Netherlands</td>
</tr>
</tbody>
</table>

**TOTAL**: -0.1% 57,809,000 57,894,000

---

**Figure 11B**

**Visitors (Millions)**

- Up to 5 m
- 5 m–10 m
- 10 m–15 m
- 15 m+

**Figure 11A**

**-0.1%**

2013–12 top 20 theme/amusement parks Europe attendance growth

**57.8 m**

2013 top 20 theme/amusement parks Europe attendance

**57.9 m**

2012 top 20 theme/amusement parks Europe attendance
This is the second year researching and publishing the TEA/AECOM Museum Index in tandem with the annual Theme Index.

In terms of data gathering for museums, we are still at a relatively early stage. A year from now, with three years of data in hand we will have a more substantial sample for interpreting the data in context, and identifying significant trends.

One thing that is readily apparent is that museums can show very dramatic attendance swings from year to year. In mature European or North American markets, these are mostly attributable to blockbuster exhibits and other unique programming that cause attendance spikes one year and drop-offs the next. In emerging Asian markets, big attendance increases are more often connected to new development.

Reinvestment is a key factor in driving repeat visitation to museums. Reinvestment can take the form of capital improvements such as an expansion — a new or renovated wing or exhibition hall, a new or upgraded theater or planetarium, or a new signature acquisition. It can take the form of a blockbuster exhibition. And it can also be in such areas as retail or restaurant offerings, marketing, customer service and staff training, and support technologies.

Europe leads the world market in museums, with the Louvre heading the list, and Europe’s top-attended museums are institutions of art, history and culture, with just one science museum in its Top 20. North America is also a leader in the field and its highest performers are art and history museums in East Coast destination cities, but the Americas list has nine science institutions and one children’s museum in its Top 20 mix. Of the top 20 museums in Asia, eight are science-related.

<table>
<thead>
<tr>
<th>2013–12 Top 20 Museums Growth Worldwide</th>
<th>105.6m</th>
<th>98.5m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance Worldwide</td>
<td>2013 Top 20 Museums Attendance Worldwide</td>
<td>2012 Top 20 Museums Attendance Worldwide</td>
</tr>
</tbody>
</table>
Double-digit attendance jumps at museums in Asia for 2013 can be credited either to a popular exhibit, or to significant renovations that produce a visitation surge on reopening. We will see these sorts of ups and downs as we continue to track the sector’s performance.

Many of the top museums in the U.S. — the Smithsonian facilities, for example, are free admission. In China, the government has mandated that publicly supported museums be free. Yet the most highly attended museum in the world, the Louvre, requires paid admission. Please discuss some of the variables here.

We have found several things in studying museum pricing. First of all, if the offering is compelling enough, people are going to go there no matter what, up to a certain point. Small increases in ticket price don’t affect that. Length of stay tends to be longer at paid-admission venues, and per capita spending is higher as well. The more immersive the visitor experience, the more patrons tend to spend on retail. Looking at museums that have transitioned from paid admission to free, we’ve noted considerable challenges. Admissions fees represent a huge part of earned revenue — about 60 percent. Free admission will bring you more traffic but not necessarily higher revenues. There’s no way to make it up through retail, and the museum has to have other forms of support in place.

How do museums address the need for revenue? Has this changed in the U.S. due to the recession?

In contrast to a straight-up, for-profit entity, they depend on a combination of earned income plus contributed income. Year to year, a museum’s focus may vary from sometimes being more mission-driven, and sometimes more revenue-driven, resulting in a mix of programming. Conflicts can arise. In our consulting work we see the decisions that museums have to make on a daily basis to balance mission with revenue needs.

Museums’ financial resources include earned revenue, endowment income and contributed income. With the economy improving, we’re seeing endowments starting to increase for those museums that have them, as well as earned income, now that visitors have more money to spend on leisure activities. The last five years have been a major wakeup call for museums in general — especially those dependent primarily on one income source. Even prior to the recession, however, U.S. museums were struggling with challenges to their funding, and looking for alternative revenue streams.

The 2012 Olympic Games helped London museums post excellent attendance figures in 2013.

It was a good year for museums in Asia, where overall attendance at the top museums reflected strong growth at around 28%. Asian countries, especially China, are currently putting substantial resources into museum development.

We’ve compiled a list of selected museum openings around the world in the last couple of years. Typically new museums experience increased attendance in the first few years between 10 to 30 percent higher than what their attendance will eventually stabilize at 3 or 4 years into their operations. Once these new museums have been operating a few years, we’ll track their attendance to understand their impact on the museum landscape. Around the world, what led to big attendance jumps at museums in 2013?

The U.K. was a special case. Hosting the 2012 Olympic Games meant that the city of London was marketed more than usual. Media coverage of the Games drew increased attention to the city, with lots of panoramic footage. That whetted people’s appetites for London as a destination. This is an example of how a major event can lead to a later bump in tourism to the host city and region, in addition to visitation at the event itself. Thus, the excellent numbers posted by London’s British Museum, National Gallery, Science Museum, Tower of London and the Victoria & Albert Museum.

In Los Angeles, The California Science Center posted a 31.5 percent attendance increase which is credited mostly to the draw of its new acquisition, the space shuttle Endeavour, for which it is currently building a new wing and exhibition environment. In St Petersburg, Russia, the State Hermitage Museum’s “Houghton Miracle” exhibit of the art collection of Britain’s first Prime Minister, Sir Robert Walpole, helped achieve an attendance increase of 8.3 percent. Reina Sofia Museum in Madrid, Spain, welcomed a 23.8 percent attendance increase from a record 732,339 visits to the Salvador Dali exhibition.

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20.2 %
British Museum,

31.5 %
California Science Center, Los Angeles, attendance growth 2013–2012

The acquisition of the Space Shuttle Endeavour drew increased attendance at the California Science Center.
We did see some museums holding their pricing down during recession, now bringing those prices up a little bit. The recession also provided opportunities for museums to build their local and regional audiences.

Tell us about museum attendance and development in Asia.

China is pursuing its initiative for all public museums to offer free admission. They’re about two-thirds of the way to that goal now. Local governments are interested in having developers build more museums, but the model is still evolving. China is also continuing to build many new museums as part of its goal to increase the ratio of museums to people, and we are still seeing about 100 new museums built annually there. However, the focus for these new museums tends to be on the building, and factors such as lack of collections, limited resources for staff training or changing exhibits, and inadequate budgets often challenge operations. We’re monitoring attendance at the new museums to see how the new museums perform. We have seen a trend towards private art museums opening, including the new Long Museum branch at the West Bund in Shanghai and the Yuz Museum, also part of the West Bund Cultural Corridor.

Several museums in Asia underwent major renovations in 2012, thus did not make the list last year but posted impressive attendance increases for 2013, namely Zhejiang Museum in Hangzhou, China, with a hefty 75 percent; National Gallery of Victoria in Sydney with 23.6 percent; and National Palace Museum of Korea in Seoul, with a whopping 118.8 percent.

The Hong Kong Science Museum hosted the most popular exhibit in its history, Legends of the Giant Dinosaurs. The museum attracted 770,000 visitors in five months, representing a 33.5 percent attendance jump because of one 2,500-square-meter exhibit.

What metrics should museums track to better gauge performance, and plan for the future?

Here is a basic list:

- Attendance — distinguishing paid programming, school groups, and traveling exhibitions
- Visitor origin, ideally by zip code in order to compare visitation to residential and tourist demographics for the region
- Square footage, in order to gauge the number of visitors per exhibit square foot. This measures how well you are able to attract people based on exhibition area. We find that more engaging exhibits require less area per visitor. The average number of visitors per square foot for all museums is five. If you break out science museums, it’s 10 or higher. History museums trend lower. High entertainment museums such as the Spy Museum can be 20 or higher.
- Penetration rates: The ratio of the number of visitors versus the overall size of the market
- Financial metrics — these have to be tracked anyway for tax purposes
- Per capita spending for retail, and retail sales per square foot
- Admission yield: The average admissions revenue per visitor. This enables you to determine the market rate top line admission price.

Topping the chart for Asia, the National Museum of China posted an attendance increase of 38.7 percent. Since reopening in 2011 and shifting its focus from local history to national history and art, this museum has regularly introduced temporary exhibitions from well-known overseas museums in order to attract a larger and more global audience.

Southeast Asian museums are comparatively weak, with only one making it to the list (National Science Museum, Thailand).

| National palace museum of Korea, Seoul, attendance growth 2013–2012 | 118.8% |
| National museum of China, Beijing, attendance growth 2013–2012 | 38.7% |
| Hong Kong Science Museum attendance growth 2013–2012 | 33.5% |
NOTABLE MUSEUM EXPANSIONS OR OPENINGS 2013–2014

EUROPE
1. Rijksmuseum
   Amsterdam, The Netherlands — April 2013
2. Museum of European and Mediterranean Civilization (MuCEM)
   Marseille, France — June 2013
3. Mystetskyi Arsenal
   Kiev, Ukraine — late 2014
4. Red Star Line Museum
   Antwerp, Belgium — September 2013
5. Danish National Maritime Museum
   Helsingør — October 2013
6. The Serpentine Sackler Gallery
7. ABBA The Museum
   Stockholm, Sweden — 2013
8. National Center for Civil and Human Rights
   Atlanta, GA, U.S.A. — June 2014
9. College Football Hall of Fame
   Atlanta, GA, U.S.A. — 2014

ASIA
10. China Wood Sculpture Museum
    Harbin, China — April 2013
11. Kyushu GeibuN Kan Museum
    Fukuoka, Japan — mid-2013
12. Long Museum
    West Bund, Shanghai, China — March 2014
    Seoul, Korea — end of 2013
14. Sifang Art Museum
    Nanjing, China — November 2013

NORTH AMERICA
15. Saint Louis Art Museum
    St. Louis, MO, U.S.A. — June 2013
16. 9/11 Memorial Museum
    New York, NY, U.S.A. — May 2014
17. Perez Art Museum
    Miami, FL, U.S.A. — 2013
18. Kimbell Art Museum
    Fort Worth, TX, U.S.A. — November 2013
19. Museum at Prairie Fire
    Overland Park, KS, U.S.A. — May 2014
20. National Center for Civil and Human Rights
    Atlanta, GA, U.S.A. — June 2014
21. College Football Hall of Fame
    Atlanta, GA, U.S.A. — 2014

LATIN AMERICA
22. BioMuseo
    Panama City, Panama — opened 2014
23. Museo Jumex
    Mexico City, Mexico — November 2013

Figure 12
### TOP 20 MUSEUMS NORTH AMERICA

#### Where are the top 20 museums in North America?

<table>
<thead>
<tr>
<th>MUSEUM AND LOCATION</th>
<th>CHANGE</th>
<th>2013 Attendance</th>
<th>2012 Attendance</th>
<th>ENTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. NATIONAL MUSEUM OF NATURAL HISTORY, Washington DC</td>
<td>5.3%</td>
<td>8,000,000</td>
<td>7,600,000</td>
<td>FREE</td>
</tr>
<tr>
<td>2. NATIONAL AIR AND SPACE MUSEUM, Washington DC</td>
<td>2.5%</td>
<td>6,970,000</td>
<td>6,800,000</td>
<td>FREE</td>
</tr>
<tr>
<td>3. THE METROPOLITAN MUSEUM OF ART, New York NY</td>
<td>2.7%</td>
<td>6,280,000</td>
<td>6,116,000</td>
<td>PAID</td>
</tr>
<tr>
<td>4. AMERICAN MUSEUM OF NATURAL HISTORY, New York NY</td>
<td>0.0%</td>
<td>5,000,000</td>
<td>5,000,000</td>
<td>PAID</td>
</tr>
<tr>
<td>5. NATIONAL MUSEUM OF AMERICAN HISTORY, Washington DC</td>
<td>2.1%</td>
<td>4,900,000</td>
<td>4,800,000</td>
<td>FREE</td>
</tr>
<tr>
<td>6. NATIONAL GALLERY OF ART, Washington DC</td>
<td>-2.4%</td>
<td>4,100,000</td>
<td>4,200,000</td>
<td>FREE</td>
</tr>
<tr>
<td>7. THE MUSEUM OF MODERN ART, New York NY</td>
<td>0.0%</td>
<td>2,800,000</td>
<td>2,800,000</td>
<td>PAID</td>
</tr>
<tr>
<td>8. CALIFORNIA SCIENCE CENTER, Los Angeles CA</td>
<td>31.5%</td>
<td>2,630,000</td>
<td>2,000,000</td>
<td>FREE</td>
</tr>
<tr>
<td>9. HOUSTON MUSEUM OF NATURAL SCIENCE, Houston TX</td>
<td>-3.9%</td>
<td>2,133,000</td>
<td>2,219,000</td>
<td>PAID</td>
</tr>
<tr>
<td>10. THE ART INSTITUTE OF CHICAGO, Chicago IL</td>
<td>2.7%</td>
<td>1,500,000</td>
<td>1,481,000</td>
<td>PAID</td>
</tr>
<tr>
<td>11. MUSEUM OF SCIENCE, Boston MA</td>
<td>-5.3%</td>
<td>1,420,000</td>
<td>1,500,000</td>
<td>PAID</td>
</tr>
<tr>
<td>12. CALIFORNIA ACADEMY OF SCIENCES, San Francisco CA</td>
<td>0.0%</td>
<td>1,400,000</td>
<td>1,400,000</td>
<td>PAID</td>
</tr>
<tr>
<td>13. MUSEUM OF SCIENCE AND INDUSTRY, Chicago IL</td>
<td>-6.7%</td>
<td>1,400,000</td>
<td>1,400,000</td>
<td>PAID</td>
</tr>
<tr>
<td>14. U.S. HOLOCAUST MEMORIAL MUSEUM, Washington DC</td>
<td>-1.9%</td>
<td>1,374,000</td>
<td>1,500,000</td>
<td>PAID</td>
</tr>
<tr>
<td>15. NATIONAL MUSEUM OF THE AMERICAN INDIAN, Washington DC</td>
<td>-14.8%</td>
<td>1,363,000</td>
<td>1,600,000</td>
<td>FREE</td>
</tr>
<tr>
<td>16. THE J. PAUL GETTY MUSEUM, Los Angeles CA</td>
<td>4.3%</td>
<td>1,356,000</td>
<td>1,300,000</td>
<td>FREE</td>
</tr>
<tr>
<td>17. UDVAR-HAZY CENTER, Washington DC</td>
<td>-7.1%</td>
<td>1,300,000</td>
<td>1,400,000</td>
<td>FREE</td>
</tr>
<tr>
<td>18. DENVER MUSEUM OF NATURE &amp; SCIENCE, Denver CO</td>
<td>4.0%</td>
<td>1,300,000</td>
<td>1,250,000</td>
<td>PAID</td>
</tr>
<tr>
<td>19. FIELD MUSEUM OF NATURAL HISTORY, Chicago IL</td>
<td>7.2%</td>
<td>1,288,000</td>
<td>1,200,000</td>
<td>PAID</td>
</tr>
<tr>
<td>20. THE CHILDREN’S MUSEUM OF INDIANAPOLIS, Indianapolis IN</td>
<td>-4.3%</td>
<td>1,215,000</td>
<td>1,270,000</td>
<td>PAID</td>
</tr>
</tbody>
</table>

**TOTAL**

1.6% attendance growth from 2012 to 2013 for the top 20 museums in North America.

**2013 Attendance**: 57,727,000

**2012 Attendance**: 56,816,000

**Change**: 1.6%

---

**Figure 13A**: Map of North America showing the locations of the top 20 museums.

**Figure 13B**: Top 20 museums and their attendance data.
Top 20 Museums Asia-Pacific

Where are the top 20 museums in Asia-Pacific?

Total 27.6% 2013–12 top 20 museums Asia-Pacific attendance growth

2013 top 20 museums Asia-Pacific attendance

2012 top 20 museums Asia-Pacific attendance

Figure 14B

Figure 14A
### Top 20 Museums in Europe

<table>
<thead>
<tr>
<th>Museum and Location</th>
<th>Change 2013</th>
<th>2013 Entry</th>
<th>2012 Entry</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Louvre, Paris, France</td>
<td>-4.0%</td>
<td>9,334,000</td>
<td>9,720,000</td>
<td>Paid</td>
</tr>
<tr>
<td>British Museum, London, U.K.</td>
<td>20.2%</td>
<td>6,701,000</td>
<td>5,576,000</td>
<td>Free</td>
</tr>
<tr>
<td>National Gallery, London, U.K.</td>
<td>16.8%</td>
<td>6,031,000</td>
<td>5,164,000</td>
<td>Free</td>
</tr>
<tr>
<td>Vatican Museums, Vatican, Vatican</td>
<td>7.8%</td>
<td>5,459,000</td>
<td>5,065,000</td>
<td>Paid</td>
</tr>
<tr>
<td>Natural History Museum, London, U.K.</td>
<td>6.4%</td>
<td>5,250,000</td>
<td>4,936,000</td>
<td>Free</td>
</tr>
<tr>
<td>Tate Modern, London, U.K.</td>
<td>-8.2%</td>
<td>4,885,000</td>
<td>5,319,000</td>
<td>Free</td>
</tr>
<tr>
<td>Centre Pompidou, Paris, France</td>
<td>-1.4%</td>
<td>3,745,000</td>
<td>3,800,000</td>
<td>Paid</td>
</tr>
<tr>
<td>Musee d’Orsay, Paris, France</td>
<td>-2.7%</td>
<td>3,482,000</td>
<td>3,579,000</td>
<td>Paid</td>
</tr>
<tr>
<td>Science Museum (South Kensington), London, U.K.</td>
<td>10.9%</td>
<td>3,317,000</td>
<td>2,990,000</td>
<td>Free</td>
</tr>
<tr>
<td>Victoria &amp; Albert Museum, London, U.K.</td>
<td>1.8%</td>
<td>3,290,000</td>
<td>3,232,000</td>
<td>Free</td>
</tr>
<tr>
<td>Reina Sofia, Madrid, Spain</td>
<td>23.8%</td>
<td>3,185,000</td>
<td>2,572,000</td>
<td>Paid</td>
</tr>
<tr>
<td>State Hermitage, St Petersburg, Russia</td>
<td>8.3%</td>
<td>3,120,000</td>
<td>2,882,000</td>
<td>Paid</td>
</tr>
<tr>
<td>Tower of London, London, U.K.</td>
<td>18.5%</td>
<td>2,895,000</td>
<td>2,444,000</td>
<td>Paid</td>
</tr>
<tr>
<td>Cite Des Sciences et de l’Industrie, Paris, France</td>
<td>-2.7%</td>
<td>2,570,000</td>
<td>2,641,000</td>
<td>Paid</td>
</tr>
<tr>
<td>Museo Nacional del Prado, Madrid, Spain</td>
<td>-14.9%</td>
<td>2,307,000</td>
<td>2,712,000</td>
<td>Paid</td>
</tr>
<tr>
<td>Rijksmuseum, Amsterdam, Netherlands</td>
<td>NA</td>
<td>2,200,000</td>
<td>NA</td>
<td>Free</td>
</tr>
<tr>
<td>National Portrait Gallery, London, U.K.</td>
<td>-3.8%</td>
<td>2,015,000</td>
<td>2,097,000</td>
<td>Free</td>
</tr>
<tr>
<td>Galleria Degli Uffizi, Florence, Italy</td>
<td>6.0%</td>
<td>1,876,000</td>
<td>1,769,000</td>
<td>Paid</td>
</tr>
<tr>
<td>National Museum of Scotland, Edinburgh, U.K.</td>
<td>-6.7%</td>
<td>1,768,000</td>
<td>1,894,000</td>
<td>Free</td>
</tr>
<tr>
<td>Tate Britain, London, U.K.</td>
<td>-10.2%</td>
<td>1,378,000</td>
<td>1,534,000</td>
<td>Free</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>4.6%</strong></td>
<td><strong>74,808,000</strong></td>
<td><strong>71,536,000</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 15A**

- **Visitors (Millions)**
  - Up to 2.5 m
  - 2.5 m–5 m
  - 5 m–7.5 m
  - 7.5 m+

**Figure 15B**

- **2013–12 top 20 museums Europe attendance growth**
  - **4.6%**
  - **74.8 m**
  - **71.5 m**

**Note:** The data represents the top 20 museums in Europe based on visitor numbers for the years 2012 and 2013. The change in attendance is indicated for each museum, with positive values indicating growth and negative values indicating decline. The categories Paid and Free denote the ticketing policy for each museum.
METHODOLOGY AND EVOLUTION OF THE TEA/AECOM THEME INDEX AND MUSEUM INDEX

Should your property be included?

This is the seventh annual Theme Index collaboration between the Themed Entertainment Association (TEA) and AECOM, although the study itself has been in existence for much longer. It began as an attendance report of major U.S. theme parks, produced by ERA (now part of AECOM) with Amusement Business magazine (now defunct). Over the years, this study evolved to add water park figures and address the international scope of the industry. Last year, the study expanded to include the Museum Index, and this year Latin American water parks have been added.

Inclusion in the annual Theme Index is now seen as a benchmark of success among operators. Every year AECOM hears from parks desiring to share their attendance increases and earn a place on the list. Operators who believe their properties should be included in the Theme Index are encouraged to contact the AECOM office in their region, after studying the criteria for consideration given below. The more feedback and information we receive, the more accurate this report will become.

AECOM obtains the figures used to create the TEA/AECOM Theme Index and Museum Index through a variety of sources, including statistics furnished directly by the operators, historical numbers, financial reports, the investment banking community and local tourism organizations, among others. The global market is studied as a whole, and each of its main regions is also studied separately: the Americas, Europe and Asia.

To be included in the study, unless it is a museum, a facility in general must be gated (entry ticket required). To be included on the top chains list, a chain operator must have theme parks in its portfolio.

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

About AECOM

AECOM is a global provider of professional technical and management support services to a broad range of markets, including transportation, facilities, environmental, energy, water and government. With approximately 45,000 employees around the world, AECOM is a leader in all of the key markets that it serves. AECOM provides a blend of global reach, local knowledge, innovation and technical excellence in delivering solutions that create, enhance and sustain the world’s built, natural and social environments. A Fortune 500 company, AECOM serves clients in more than 150 countries and has annual revenue in excess of $8.0 billion. More information on AECOM and its services can be found at www.aecom.com. Follow AECOM on Twitter at @AECOM.

About TEA

The TEA (Themed Entertainment Association) is an international nonprofit alliance founded in 1991 and based in Burbank, Calif. TEA represents some 8,000 creative specialists, from architects to designers, technical specialists to master planners, scenic fabricators to artists, and builders to feasibility analysts working in some 1,000 firms in 40 different countries. TEA presents the annual Thea Awards and the TEA Summit and hosts the annual SATE conference (Story, Architecture, Technology, Experience). TEA also produces a variety of print and electronic publications, including the TEA/AECOM Annual Theme Index, TEA Annual & Directory and Thea Awards Program.

Visit www.TEAConnect.org. On Twitter: @tea_connect.