Leisure + Culture

AECOM

2013 THEME INDEX

2013 MUSEUM INDEX

TEA THEMED ENTERTAINMENT ASSOCIATION

GLOBAL ATTRACTIONS ATTENDANCE REPORT

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2013 THEME INDEX

2013 MUSEUM INDEX

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 6

A year of exceptional performance globally, with Asia leading the pack and a return of activity in the Middle East.

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THE BIG PICTURE

Interview with John Robinett Senior Vice President Economics

We've seen healthy growth this year, with the major theme park operators posting 5.4 percent growth overall.

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 9 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.

5.4 %

2013–12 top 10 theme park groups worldwide growth

377.1 m

2013 top 10 theme park groups worldwide attendance

4.3%

2013–12 top 25 amusement / theme parks worldwide growth

214.7 m

2013 top 25 amusement / theme parks worldwide attendance

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 10 THEME PARK GROUPS WORLDWIDE

GROUP		*CHANGE*	*2013*	*2012*
1	WALT DISNEY ATTRACTIONS	4.8%	132,549,000	*126,479,000*
2	MERLIN ENTERTAINMENTS GROUP	10.7%	59,800,000	*54,000,000*
3	UNIVERSAL PARKS AND RESORTS	5.3%	36,360,000	*34,515,000*
4	OCT PARKS CHINA	12.1%	26,180,000	*23,359,000*
5	SIX FLAGS INC.	1.4%	26,100,000	*25,750,000*
6	PARQUES REUNIDOS	-4.1%	26,017,000	*27,130,000*
7	CEDAR FAIR ENTERTAINMENT COMPANY	0.9%	23,519,000	*23,300,000*
8	SEAWORLD PARKS & ENTERTAINMENT	-4.1%	23,400,000	*24,391,000*
9	FANTAWILD GROUP (NEW)	42.7%	13,118,000	*9,193,000*
10	HAICHANG GROUP	7.4%	10,096,000	*9,400,000*
TOTAL		*5.4%*	*377,139,000*	*357,843,000*

Figure 1

5.4%

2013–12 top 10 theme park groups worldwide growth

377.1 m

2013 top 10 theme park groups worldwide attendance

357.8 m

2012 top 10 theme park groups worldwide attendance

TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE

Where are the top 25 amusement/ theme parks worldwide?

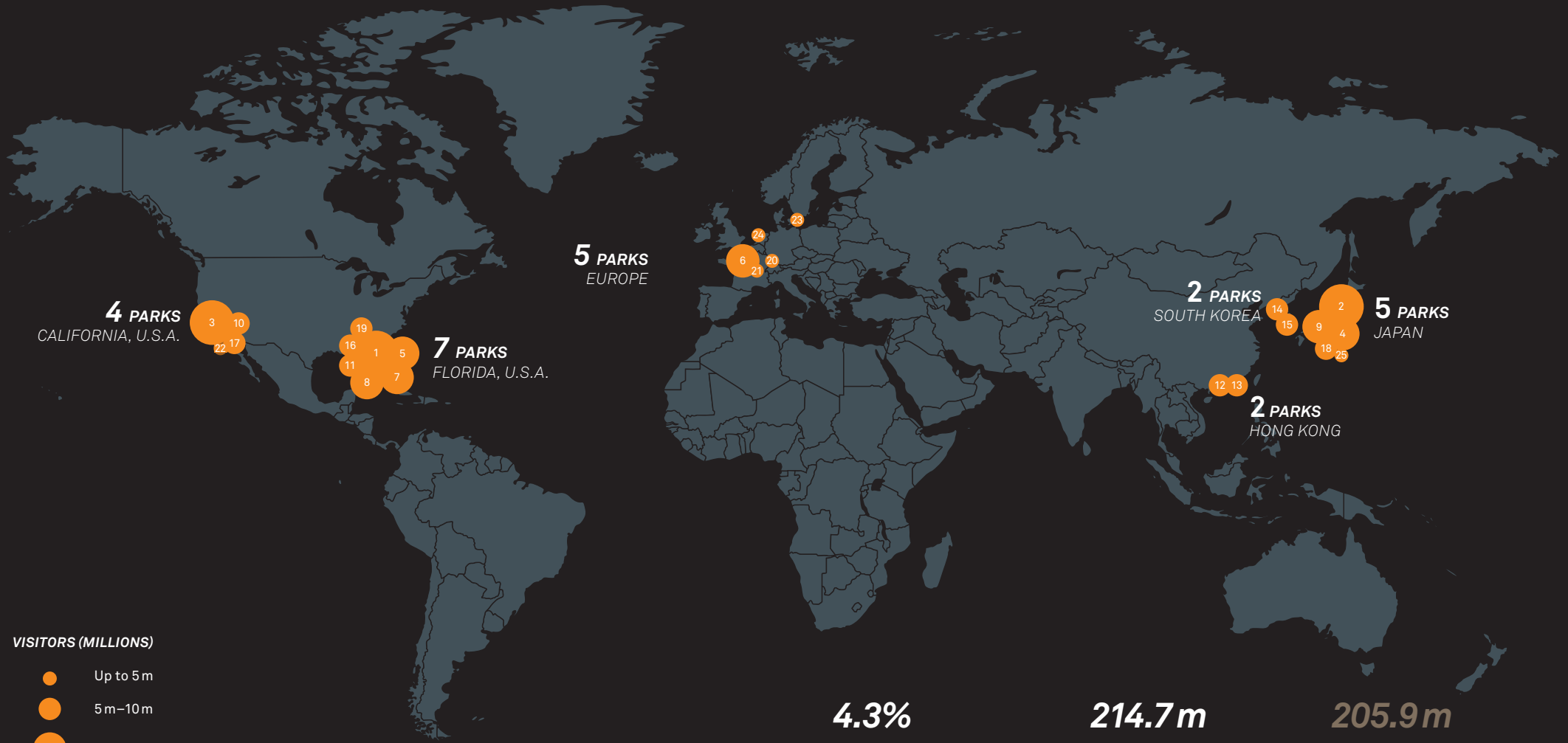


Figure 2A

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 f 25 amusement/theme parks worldwide attendance

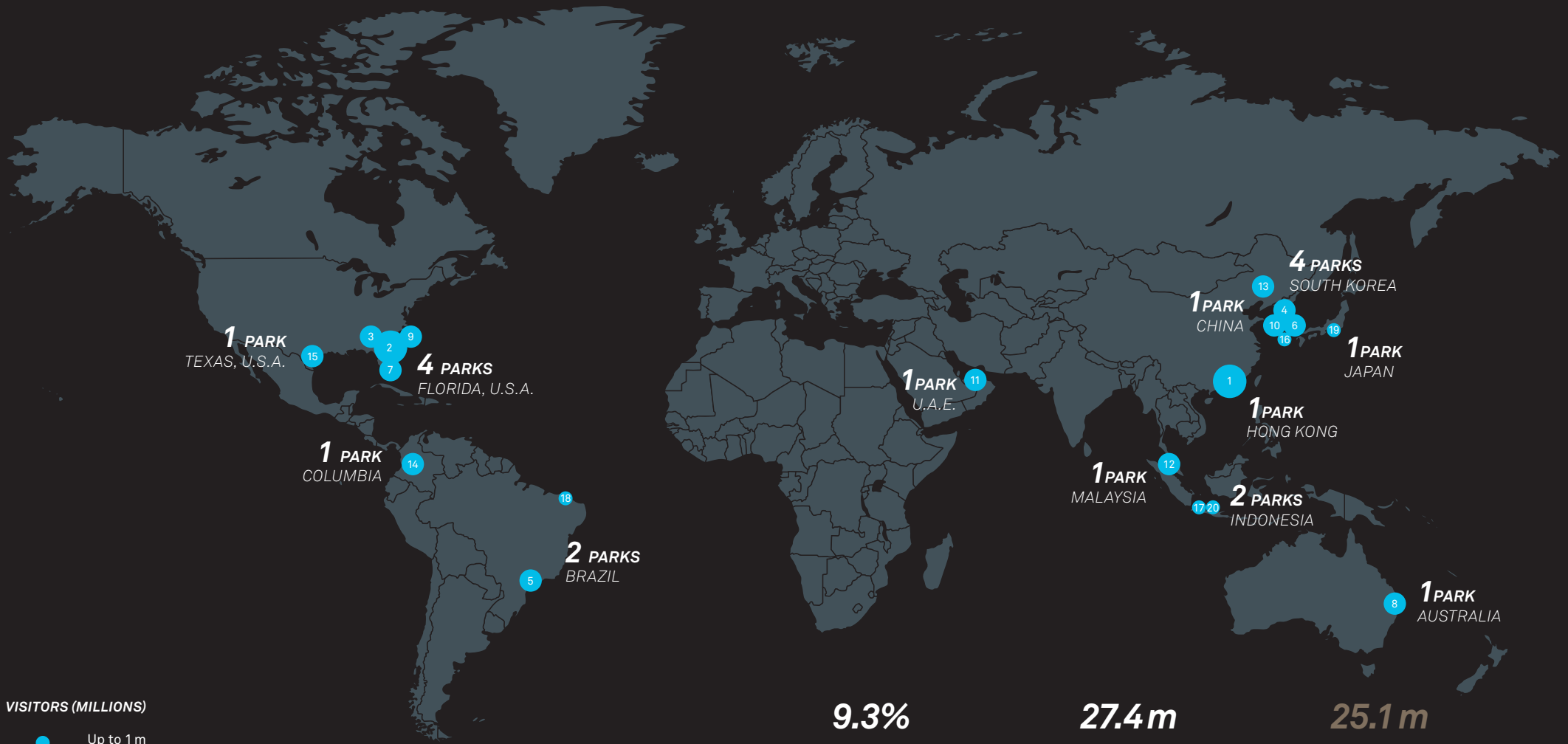
TOP 25 THEME/AMUSEMENT PARKS WORLDWIDE

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

Figure 2B

TOP 20 WATER PARKS WORLDWIDE

Where are the top 20 water parks worldwide?



VISITORS (MILLIONS)

- Up to 1 m
- 1 m–2m
- 2 m+

Figure 3A

9.3%

2013–12 top 25 water parks worldwide attendance growth

27.4m

2013 top 25 water parks worldwide attendance

25.1m

2012 top 25 water parks worldwide attendance

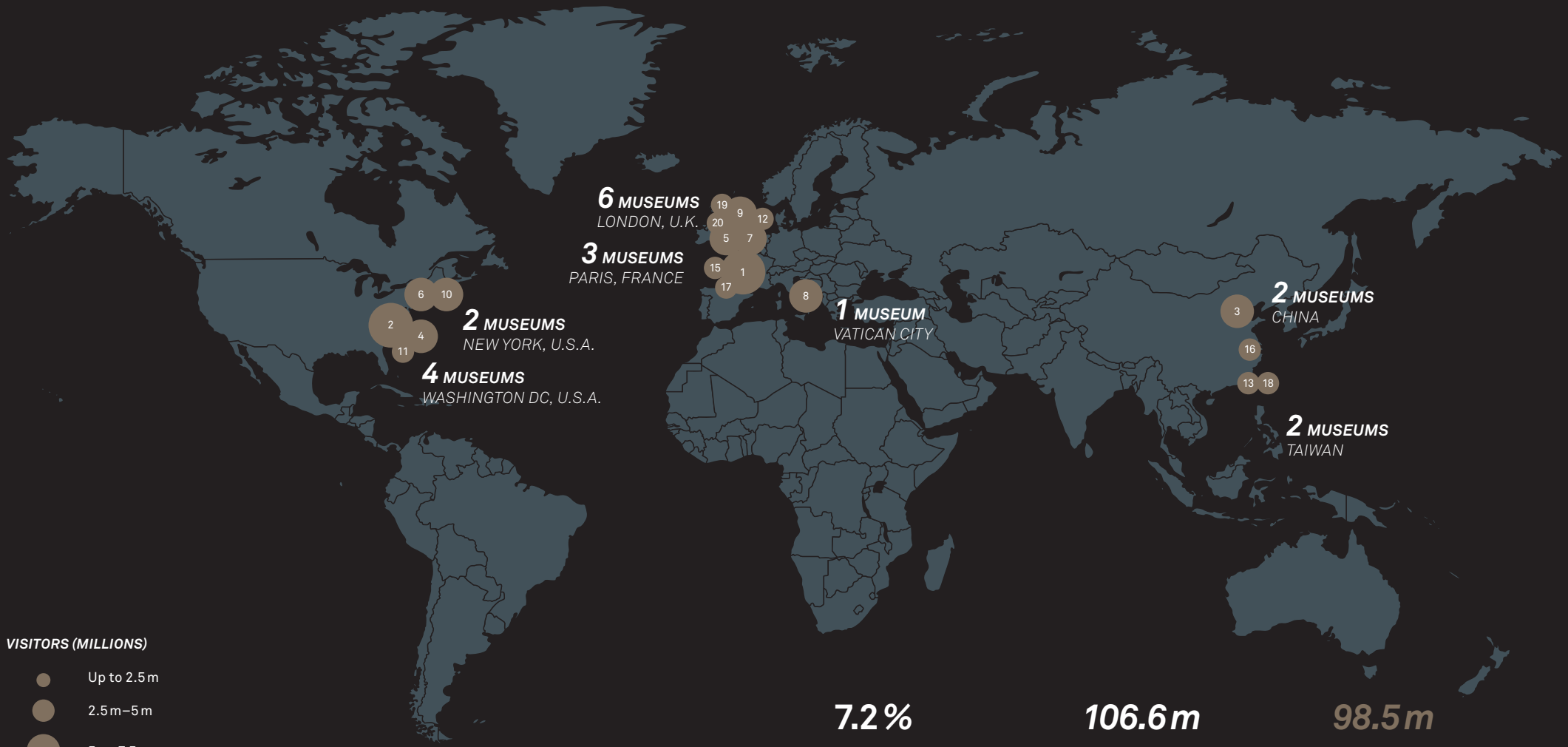
TOP 20 WATER PARKS WORLDWIDE

	PARK AND LOCATION	*CHANGE*	*2013*	*2012*
1	CHIMELONG WATERPARK, Guangzhou, China	34.1%	2,710,000	2,021,000
2	TYPHOON LAGOON AT DISNEY WORLD, Orlando, FL	2.0%	2,142,000	2,100,000
3	BLIZZARD BEACH AT DISNEY WORLD, Orlando, FL	2.0%	1,968,000	1,929,000
4	OCEAN WORLD, Gangwon-Do South Korea	-1.2%	1,700,000	1,720,000
5	THERMAS DOS LARANJAIS, Olimpia, Brazil	26.9%	1,650,000	1,300,000
6	CARIBBEAN BAY, Gyeonggi-Do, South Korea	7.6%	1,623,000	1,508,000
7	AQUATICA, Orlando, FL	1.0%	1,553,000	1,538,000
8	WET N WILD GOLD COAST, Austrailia,	17.4%	1,409,000	1,200,000
9	WET 'N WILD, Orlando, FL	1.0%	1,259,000	1,247,000
10	RESOM SPA CASTLE, Deoksan, South Korea	2.7%	1,189,000	1,158,000
11	AQUAVENTURE, Dubai, UAE	-7.7%	1,200,000	1,300,000
12	SUNWAY LAGOON, Kuala Lumpur, Malaysia	-8.3%	1,100,000	1,200,000
13	SHENYANG ROYAL HAWAII WATER PARK, Shenyang, China	10.0%	1,100,000	1,000,000
14	PISCILAGO, Girardo (Bogota), Colombia	0.2%	1,035,000	1,033,000
15	SCHLITTERBAHN, New Braunfels, TX	1.0%	1,027,000	1,017,000
16	WOONGJIN PLAYDOCI WATERDOCI, Gyeonggi-Do, South Korea	-0.6%	997,000	1,003,000
17	ATLANTIS WATER ADVENTURE, Jakarta, Indonesia	-2.0%	980,000	1,000,000
18	BEACH PARK, Aquiraz, Brazil	14.4%	964,000	843,000
19	SUMMERLAND, Tokyo , Japan	-5.2%	939,000	990,000
20	THE JUNGLE WATER ADVENTURE, Bogor, West Java	-7.5%	880,000	951,000
	TOTAL	**9.3%**	**27,425,000**	**25,100,000**

Figure 3B

TOP 20 MUSEUMS WORLDWIDE

Where are the top 20 museums worldwide?



VISITORS (MILLIONS)

- Up to 2.5 m
- 2.5 m–5 m
- 5 m–7.5 m
- 7.5 m+

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 20 museums worldwide attendance

Figure 4A

TOP 20 MUSEUMS WORLDWIDE

	MUSEUM AND LOCATION	*CHANGE*	*2013*	*2012*	*ENTRY*
1	LOUVRE, Paris, France	-4.0%	9,334,000	9,720,000	PAID
2	NATIONAL MUSEUM OF NATURAL HISTORY, Washington DC	5.3%	8,000,000	7,600,000	FREE
3	NATIONAL MUSEUM OF CHINA, Beijing, China	38.7%	7,450,000	5,370,000	FREE
4	NATIONAL AIR AND SPACE MUSEUM, Washington DC	2.5%	6,970,000	6,800,000	FREE
5	BRITISH MUSEUM, London, U.K.	20.2%	6,701,000	5,576,000	FREE
6	THE METROPOLITAN MUSEUM OF ART, New York NY	2.7%	6,280,000	6,116,000	PAID
7	NATIONAL GALLERY, London, U.K.	16.8%	6,031,000	5,164,000	FREE
8	VATICAN MUSEUMS, Vatican	7.8%	5,459,000	5,065,000	PAID
9	NATURAL HISTORY MUSEUM, London, U.K.	6.4%	5,250,000	4,936,000	FREE
10	AMERICAN MUSEUM OF NATURAL HISTORY, New York	0.0%	5,000,000	5,000,000	PAID
11	NATIONAL MUSEUM OF AMERICAN HISTORY, Washington DC	2.1%	4,900,000	4,800,000	FREE
12	TATE MODERN, London, U.K.	-8.2%	4,885,000	5,319,000	FREE
13	NATIONAL PALACE MUSEUM (TAIWAN), Taipei, Taiwan	1.2%	4,412,000	4,361,000	PAID
14	NATIONAL GALLERY OF ART, Washington DC	-2.4%	4,100,000	4,200,000	FREE
15	CENTRE POMPIDOU, Paris, France	-1.4%	3,745,000	3,800,000	PAID
16	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, Shanghai, China	11.5%	3,580,000	3,210,000	PAID
17	MUSEE D'ORSAY, Paris, France	-2.7%	3,482,000	3,579,000	PAID
18	NATIONAL MUSEUM OF NATURAL SCIENCE, Taichung, Taiwan	15.0%	3,396,000	2,954,000	PAID
19	SCIENCE MUSEUM (SOUTH KENSINGTON), London, U.K.	10.9%	3,317,000	2,990,000	FREE
20	VICTORIA & ALBERT MUSEUM, London, U.K.	1.8%	3,290,000	3,232,000	FREE
	TOTAL	**7.2%**	**105,582,000**	**98,486,000**	

Figure 4B

Universal Studios,
Florida, U.S.A.

THE AMERICAS

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

Interview with Brian Sands Vice President Economics, Americas

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

2013 represents the fourth straight year of growth since the worst of the Great Recession.

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 upgrades give creatives state-of-the-art storytelling tools and the ability to produce environments and experiences that simply weren't possible a decade ago. This is often coupled with the deft use of studio intellectual properties (IPs). Some outstanding recent examples include Cars Land (Disney) and the Wizarding World of Harry Potter, and Transformers™: The Ride-3D (Universal Studios). Technology gives IP owners the ability to tell their stories across multiple platforms very effectively.

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 Fantasyland. 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.

17%

top 20 theme/ amusement parks in North America increase in attendance over 10 years

18.6 m

Attendance at Magic Kingdom, 2013 — the most visited theme park in the world

6 %

Magic Kingdom Florida attendance growth 2013–2012

14 %

Universal Studios Florida attendance growth 2013–2012

All major operators with significant operations in North America reported increased per capita revenues, some markedly.

The Latin American water park sector is growing rapidly and expected to continue to do so.

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.

Tell us about the Latin American theme park market.

In Latin America, the top 10 theme park market experienced an increase to 13.7 million visits in 2013 or 3.8 percent. This is good given the slowing of the Latin American economies, though it must be acknowledged that on a same park basis, growth was only about 1 percent.

At the park level, results were very mixed. The two largest parks, Six Flags Mexico in Mexico City and Hopi Hari near São Paulo, are estimated to have had modest positive increases to reach 2.3 million and 1.7 million, respectively. Six Flags Mexico's increase was driven primarily by the addition of a new ride (The Joker), while Hopi Hari's increase was driven by the new Justice League area.

The two Latin American parks with the largest increases were Parque Mundo Aventura and Salitre Magico, both in Bogotá, Colombia, with just under 100,000 additional visits each, remaining at about 1.1 million visits each — both benefited from relatively strong growth of the national and regional economy as well as capital improvements. Beto Carrero World in Penha, Brazil also had an increase to reach 1.5 million visitors, driven by minor changes at the park, placing it just behind La Feria de Chapultpepec in Mexico City.

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.

What are some key points for North American water parks?

The top 20 water parks declined by about 2.3 percent to 15.0 million visits, so performance was not spectacular but the sector displays long-term vigor. Comparing the top 10 water parks in 2004 with those same parks in 2013, they had 8.69 million visits a decade ago, while in 2013 those same parks had 9.75 million visits: an increase of 12 percent. Again, by comparison, over this period the U.S. population grew at 9 percent.

As with theme parks, reinvestment and advances in technology over the last decade have significantly improved the quality, uniqueness, and intensity of the experience for visitors, who may for instance opt to slide through a dolphin tank (Aquatica), be shot uphill on a raft (Schlitterbahn New Braunfels), slide for over two minutes (Splashin' Safari), loop vertically (Noah's Ark), or float for a mile (Schlitterbahn Galveston).

Why are you introducing the Top 10 Water Parks in Latin America as a new separate list this year?

Total attendance at these parks was 6.43 million in 2013. The Latin American water park sector is growing rapidly and expected to continue to do so. As an example, Beach Park in Fortaleza, Brazil, had 964,000 visits in 2013 (placing it 18th worldwide), up over 14 percent versus last year and almost triple its attendance around a decade ago. This park benefits from an excellent beach location and strong management, and has invested in new rides, improved the quality of guest services, increased its stock of on-site hotel rooms, and improved linkages with air and tour operators. We see similarly strong increases occurring at several major water parks in the region and expect other parks to learn from these examples.

Reinvestment and advances in technology over the last decade have significantly improved the quality, uniqueness, and intensity of the experience for visitors.

TOP 20 THEME/AMUSEMENT PARKS NORTH AMERICA

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

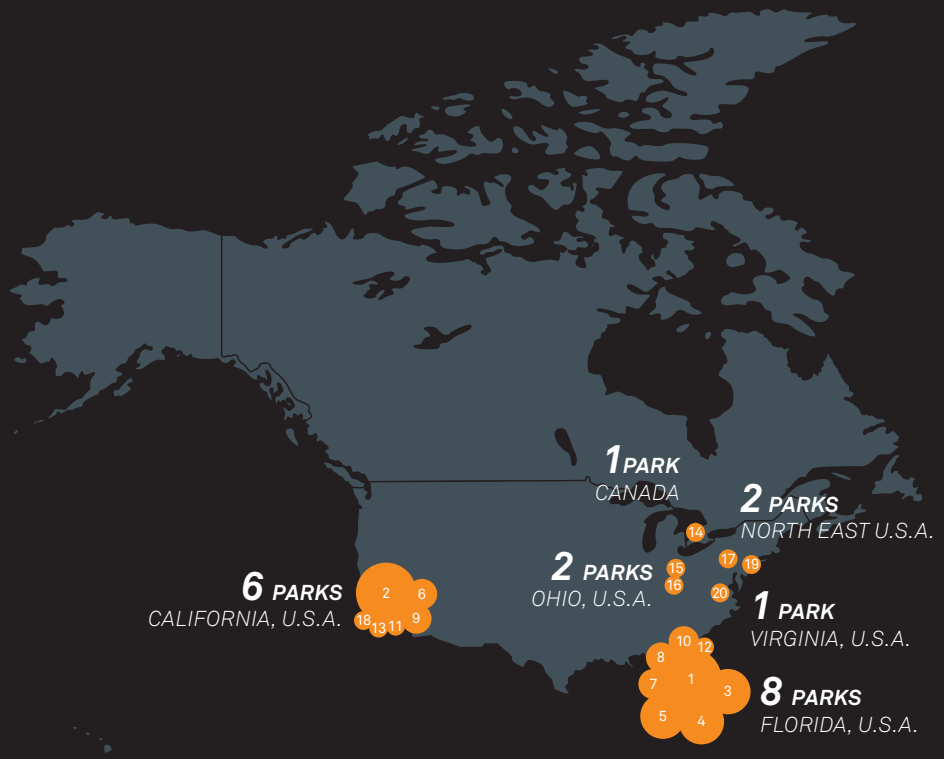


Figure 5A

	PARK AND LOCATION	CHANGE	2013	2012
1	MAGIC KINGDOM at Walt Disney World, Lake Buena Vista, FL	6.0%	18,588,000	17,536,000
2	DISNEYLAND, Anaheim, CA	1.5%	16,202,000	15,963,000
3	EPCOT at Walt Disney World, Lake Buena Vista, FL	1.5%	11,229,000	11,063,000
4	DISNEY'S ANIMAL KINGDOM at Walt Disney World, Lake Buena Vista, FL	2.0%	10,198,000	9,998,000
5	DISNEY'S HOLLYWOOD STUDIOS at Walt Disney World, Lake Buena Vista, FL	2.0%	10,110,000	9,912,000
6	DISNEY'S CALIFORNIA ADVENTURE, Anaheim, CA	9.5%	8,514,000	7,775,000
7	ISLANDS OF ADVENTURE at Universal Orlando, FL	2.0%	8,141,000	7,981,000
8	UNIVERSAL STUDIOS at Universal Orlando, FL	14.0%	7,062,000	6,195,000
9	UNIVERSAL STUDIOS HOLLYWOOD, Universal City, CA	4.0%	6,148,000	5,912,000
10	SEAWORLD FL, Orlando, FL	-5.0%	5,090,000	5,358,000
11	SEAWORLD CA, San Diego, CA	-3.0%	4,311,000	4,444,000
12	BUSCH GARDENS TAMPA BAY, Tampa, FL	-6.0%	4,087,000	4,348,000
13	KNOTT'S BERRY FARM, Buena Park, CA	5.0%	3,683,000	3,508,000
14	CANADA'S WONDERLAND, Maple, Ontario	-2.0%	3,582,000	3,655,000
15	CEDAR POINT, Sandusky, OH	5.0%	3,382,000	3,221,000
16	KINGS ISLAND, Kings Island, OH	0.0%	3,206,000	3,206,000
17	HERSHEYPARK, Hershey, PA	1.3%	3,180,000	3,140,000
18	SIX FLAGS MAGIC MOUNTAIN, Valencia, CA	3.5%	2,906,000	2,808,000
19	SIX FLAGS GREAT ADVENTURE, Jackson, NJ	5.7%	2,800,000	2,650,000
20	BUSCH GARDENS WILLIAMSBURG Williamsburg, VA	-4.5%	2,726,000	2,854,000
TOTAL		**2.7%**	**135,145,000**	**131,555,000**

Figure 5B

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?

Figure 6A

	PARK AND LOCATION	CHANGE	2013	2012
1	SIX FLAGS MEXICO, Mexico City, Mexico	1.5%	2,345,000	2,310,000
2	HOPI HARI, São Paulo, Brazil	3.5%	1,685,000	1,628,000
3	LA FERIA DE CHAPULTEPEC, Mexico City, Mexico	0.0%	1,537,000	1,537,000
4	BETO CARRERO WORLD, Santa Catarina, Brazil	2.0%	1,530,000	1,500,000
5	MUNDO PETAPA, Guatemala City, Guatemala	-15.7%	1,056,000	1,253,000
6	PLAZA DE SESAMO, Monterrey, Mexico	1.0%	1,209,000	1,197,000
7	PARQUE DE LA COSTA, Tigre, Argentina	-3.8%	1,050,000	1,091,000
8	FANTASIALANDIA, Santiago, Chile	1.5%	1,086,000	1,070,000
9	PARQUE MUNDO AVENTURA, Bogota, Colombia	8.2%	1,152,000	1,065,000
10	EL SALITRE MAGICO, Bogota, Colombia	10.0%	1,054,000	958,000
TOTAL		**3.8%**	**13,704,000**	**13,199,000**

Figure 6B

3.8%

2013–12 top 10 theme/amusement parks Latin America attendance growth

13.7m

2013 top 10 theme/amusement parks Latin America attendance

13.2m

2012 top 10 theme/amusement parks Latin America attendance

TOP 20 WATER PARKS NORTH AMERICA

Where are the top 20 water parks in North America?

Figure 7A

	PARK AND LOCATION	CHANGE	2013	2012
1	DISNEY'S TYPHOON LAGOON AT DISNEY WORLD, Orlando, FL	2.0%	2,142,000	2,100,000
2	DISNEY'S BLIZZARD BEACH AT DISNEY WORLD, Orlando, FL	2.0%	1,968,000	1,929,000
3	AQUATICA, Orlando, FL	1.0%	1,553,000	1,538,000
4	WET 'N' WILD, Orlando, FL	1.0%	1,259,000	1,247,000
5	SCHLITTERBAHN, New Braunfels, TX	1.0%	1,027,000	1,017,000
6	WATER COUNTRY USA, Williamsburg, VA	-2.9%	726,000	748,000
7	ADVENTURE ISLAND, Tampa, FL	-2.0%	638,000	651,000
8	SCHLITTERBAHN, Galveston,TX	0.0%	546,000	546,000
9	HYLAND HILLS WATER WORLD, Denver, CO	0.0%	538,000	538,000
10	SIX FLAGS-HURRICANE HARBOR, Arlington, TX	2.0%	518,000	508,000
11	SIX FLAGS-WHITE WATER, Marietta, GA	0.0%	505,000	505,000
12	WET 'N' WILD, Phoenix, AZ	2.4%	472,000	461,000
13	SIX FLAGS HURRICANE HARBOR, Jackson, NJ	1.9%	432,000	424,000
14	RAGING WATERS, San Dimas, CA	-5.6%	423,000	448,000
15	SPLISH-SPASH, Riverhead, NY	-5.5%	411,000	435,000
16	WET 'N' WILD EMERALD POINT, Greensboro, NC	-2.0%	398,000	406,000
17	SOAK CITY CEDAR POINT, Sandusky, OH	-6.0%	379,000	403,000
18	KNOTT'S SOAK CITY USA, Buena Park, CA	5.1%	368,000	350,000
19	CAMELBEACH, Tannersville, PA	0.0%	367,000	367,000
20	ZOOMEZI BAY, Powell, OH	-7.5%	360,000	389,000
	TOTAL	**-2.3%**	**15,030,000**	**15,386,000**

Figure 7B

-2.3%

2013–12 top 20 water parks North America attendance growth

15.0m

2013 top 20 water parks North America attendance

15.4m

2012 top 20 water parks North America attendance

TOP 10 WATER PARKS LATIN AMERICA

Where are the top 10 water parks in Latin America?

Figure 8A

	PARK AND LOCATION	2013
1	THERMAS DOS LARANJAIS, 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 Martín 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**

Figure 8B

6.4 m

2013 top 10 water parks Latin America attendance

ASIA-PACIFIC

Accelerating growth

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

Beth Chang, Regional Director Economics, Asia-Pacific

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 9 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.

7.5%

2013–12 top 20 theme/ amusement parks Asia-Pacific attendance growth

116.8m

2013 top 20 theme/ amusement parks Asia-Pacific attendance

108.7m

2012 top 20 theme/ amusement parks Asia-Pacific attendance

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 five parks with the greatest attendance increases all added attractions and underwent expansions and/or renovations.

17.2 m

Attendance at Tokyo Disneyland — the second most visited theme park in the world

15.9 %

Tokyo Disneyland attendance growth 2013–2012

34.1 %

Chimelong Water Park attendance growth 2013–2012

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 9 percent. Chimelong remains number one, having had an incredible 34.1 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.

There is huge growth in the number of water parks in Asia and room for a lot more.

Unlike the U.S. where there was a push to create a standard, in Asia there's a lot of variety and experimentation.

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.

9.4%

2013–12 top 15 water parks growth Asia-Pacific

17.4%

2013–12 Wet 'n' Wild Gold Coast, Australia, attendance growth

TOP 20 THEME/AMUSEMENT PARKS ASIA-PACIFIC

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

Figure 9A

	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, Hanghzou, 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%	3,650,000	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

Figure 9B

7.5%

2013–12 top 20 theme/amusement parks Asia-Pacific attendance growth

116.8m

2013 top 20 theme/amusement parks Asia-Pacific attendance

108.7m

2012 top 20 theme/amusement parks Asia-Pacific attendance

TOP 15 WATER PARKS ASIA-PACIFIC

Where are the top 15 water parks in Asia-Pacific?

VISITORS (MILLIONS)

- Up to 1 m
- 1 m–2m
- 2 m+

Figure 10A

	PARK AND LOCATION	*CHANGE*	*2013*	*2012*
1	CHIMELONG WATERPARK, Guangzhou, China	34.1%	2,710,000	2,021,000
2	OCEAN WORLD, Gangwon-Do South Korea	-1.2%	1,700,000	1,720,000
3	CARIBBEAN BAY, Gyeonggi-Do, South Korea	7.6%	1,623,000	1,508,000
4	WET 'N' WILD GOLD COAST, Austrailia,	17.4%	1,409,000	1,200,000
5	RESOM SPA CASTLE, Deoksan, South Korea	2.7%	1,189,000	1,158,000
6	ROYAL HAWAII WATER PARK, Fushun, China	10.0%	1,100,000	1,000,000
7	SUNWAY LAGOON, Kuala Lumpur, Malaysia	-8.3%	1,100,000	1,200,000
8	WOONGJIN PLAYDOCI WATERDOCI, Gyeonggi-Do, South Korea	-0.6%	997,000	1,003,000
9	ATLANTIS WATER ADVENTURE, Jakarta, Indonesia	-2.0%	980,000	1,000,000
10	SUMMERLAND, Tokyo, Japan	-5.2%	939,000	990,000
11	THE JUNGLE WATER ADVENTURE, Bogor, West Java	-7.5%	880,000	951,000
12	OCEAN PARK WATER ADVENTURE, Jakarta, Indonesia	6.7%	800,000	750,000
13	PLAYAMAYA WATER PARK, Wuhan, China (new)	NA	740,000	NA
14	RESOM OCEAN CASTLE, Chungcheongnam-Do, South Korea	7.4%	685,000	638,000
15	ADVENTURE COVE WATERPARK, Singapore (new)	NA	648,000	NA
TOTAL		**9.4%**	**17,500,000**	**15,999,000**

Figure 10B

9.4%

2013–12 top 15 water parks Asia-Pacific

17.5m

2013 top 15 water parks Asia-Pacific attendance

16.0m

2012 top 15 water parks Asia-Pacific attendance

Tivoli Gardens,
Copenhagen, Denmark

EMEA

In Europe, full economic recovery is still elusive. In the Middle East, the pace starts to pick up again.

Interview with Jodie Lock, Senior Analyst Economics, Europe

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.

-0.1 %

2013–12 top 15 theme/ amusement park 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

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

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!

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.

15.4%

Chessington World of Adventures , U.K., attendance growth 2013–2012

11.1%

Thorpe Park, U.K., attendance growth 2013–2012

6.5%

Europa Park, Germany, attendance growth 2013–2012

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

A particularly interesting change in this years' 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 refinancing 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.

Are there any significant trends in acquisition/ownership of parks and chains in Europe?

The European attraction market remains fragmented, with a large number of independently owned parks. However, it has become apparent that the aura of mistrust surrounding private equity firms has finally been lifted. In November 2013, KKR (a U.S. private equity firm) picked up a 49.9 percent stake in PortAventura, Spain in a deal that gave the company a valuation of €439 million. This acquisition adds weight to a growing trend of private-equity backed attractions, such as those operated by Merlin Entertainments (Blackstone and CVC Capital) and Parques Reunidos (Arle Capital Partners). The IPO of Merlin in November 2013 proved successful, where it debuted at 315p per share on the London Stock Exchange. This is not just a European trend, it is a global one.

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.

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

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.

The country understands it needs to build upon and sustain itself as a competitive global tourism destination and in order to do this they must provide a broader spectrum of visitor experiences. This knowledge underpins the development of a museum cluster on Saadiyat Island and has always been a key reason behind the plans for visitor attractions across the UAE.

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.

TOP 20 THEME/AMUSEMENT PARKS EUROPE

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

2 ***PARKS***
HONG KONG

VISITORS (MILLIONS)

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

Figure 11A

	PARK AND LOCATION	*CHANGE*	*2013*	*2012*
1	DISNEYLAND PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France	-6.9%	10,430,000	11,200,000
2	EUROPA PARK, Rust, Germany	6.5%	4,900,000	4,600,000
3	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, Marne-La-Vallee, France	-6.9%	4,470,000	4,800,000
4	TIVOLI GARDENS, Copenhagen, Denmark	4.1%	4,200,000	4,033,000
5	DE EFTELING, Kaatsheuvel, Netherlands	-1.2%	4,150,000	4,200,000
6	PORTAVENTURA, Salou, Spain	-4.0%	3,400,000	3,540,000
7	LISEBERG, Gothenburg, Sweden	2.1%	2,860,000	2,800,000
8	GARDALAND, Castelnuovo del Garda, Italy	0.0%	2,700,000	2,700,000
9	ALTON TOWERS, Staffordshire, England	4.2%	2,500,000	2,400,000
10	LEGOLAND WINDSOR, Windsor, England	2.5%	2,050,000	2,000,000
11	THORPE PARK, Chertsey, England	11.1%	2,000,000	1,800,000
12	LEGOLAND BILLUND, Billund, Denmark	9.1%	1,800,000	1,650,000
13	PHANTASIALAND, Brühl, Germany	0.0%	1,750,000	1,750,000
14	PUY DU FOU, Les Epesses, France	8.8%	1,740,000	1,600,000
15	PARC ASTERIX, Plailly, France	-6.0%	1,620,000	1,723,000
16	GRONALUND, Stockholm, Sweden	6.6%	1,500,000	1,408,000
17	CHESSINGTON WORLD OF ADVENTURES, Chessington, U.K.	15.4%	1,500,000	1,300,000
18	FUTUROSCOPE, Jaunay-Clan, France	-15.4%	1,464,000	1,730,000
19	HEIDE PARK, Soltau, Germany	7.7%	1,400,000	1,300,000
20	DUINRELL/ATTRAKTIEPARK, Netherlands	1.1%	1,375,000	1,360,000
TOTAL		**-0.1%**	**57,809,000**	**57,894,000**

Figure 11B

-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

Tower of London,
London, UK

MUSEUMS

Reinvestment is a key factor in driving repeat visitation. Attendance swings from year to year in mature markets are mostly attributable to blockbuster exhibits. It was a good year in Asia's emerging museum sector.

Interview with
Linda Cheu
Vice President
With contributions
by Beth Chang and
Jodie Lock

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.

7.2%
2013–12 top 20 museums growth worldwide

105.6m
2013 top 20 museums attendance worldwide

98.5m
2012 top 20 museums attendance worldwide

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.

20.2%

British Museum, London, attendance growth 2013–2012

31.5%

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

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 acquisition of the Space Shuttle Endeavour drew increased attendance at the California Science Center.

China is pursuing its initiative for all public museums to offer free admission.

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.

118.8%

National palace museum of Korea, Seoul, attendance growth 2013–2012

38.7%

National museum of China, Beijing, attendance growth 2013–2012

33.5%

Hong Kong Science Museum attendance growth 2013–2012

Attendance at The Hong Kong Science Museum increased by 33.5 percent because of one 2,500-square-meter exhibit.

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.

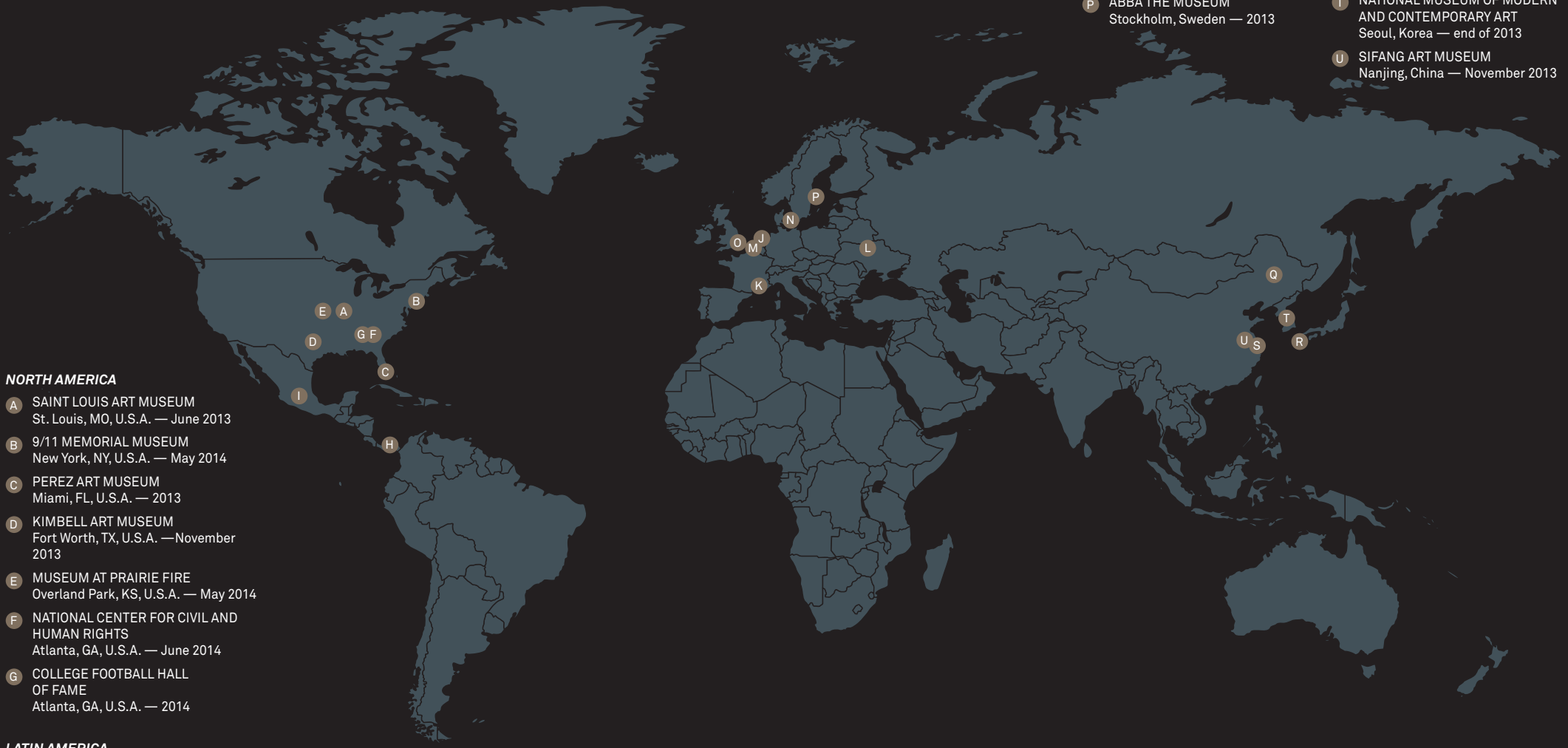
Southeast Asian museums are comparatively weak, with only one making it to the list (National Science Museum, Thailand).

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.

NOTABLE MUSEUM EXPANSIONS OR OPENINGS 2013–2014



NORTH AMERICA

- A SAINT LOUIS ART MUSEUM
  St. Louis, MO, U.S.A. — June 2013
- B 9/11 MEMORIAL MUSEUM
  New York, NY, U.S.A. — May 2014
- C PEREZ ART MUSEUM
  Miami, FL, U.S.A. — 2013
- D KIMBELL ART MUSEUM
  Fort Worth, TX, U.S.A. —November 2013
- E MUSEUM AT PRAIRIE FIRE
  Overland Park, KS, U.S.A. — May 2014
- F NATIONAL CENTER FOR CIVIL AND HUMAN RIGHTS
  Atlanta, GA, U.S.A. — June 2014
- G COLLEGE FOOTBALL HALL OF FAME
  Atlanta, GA, U.S.A. — 2014

LATIN AMERICA

- H BIOMUSEO
  Panama City, Panama — opened 2014
- I MUSEO JUMEX
  Mexico City, Mexico — November 2013

EUROPE

- J RIJKSMUSEUM
  Amsterdam, The Netherlands — April 2013
- K MUSEUM OF EUROPEAN AND MEDITERRANEAN CIVILIZATION (MUCEM) Marseille, France — June 2013
- L MYSTETSKYI ARSENAL
  Kiev, Ukraine — late 2014
- M RED STAR LINE MUSEUM
  Antwerp, Belgium — September 2013
- N Danish National Maritime Museum
  Helsingør — October 2013
- O THE SERPENTINE SACKLER GALLERY London, U.K. — 2013
- P ABBA THE MUSEUM
  Stockholm, Sweden — 2013

ASIA

- Q CHINA WOOD SCULPTURE MUSEUM
  Harbin, China — April 2013
- R KYUSHU GEIBUN KAN MUSEUM
  Fukuoka, Japan — mid-2013
- S LONG MUSEUM
  West Bund, Shanghai, China — March 2014
- T NATIONAL MUSEUM OF MODERN AND CONTEMPORARY ART
  Seoul, Korea — end of 2013
- U SIFANG ART MUSEUM
  Nanjing, China — November 2013

Figure 12

TOP 20 MUSEUMS NORTH AMERICA

Where are the top 20 museums In North America?

VISITORS (MILLIONS)

- Up to 2.5 m
- 2.5 m–5 m
- 5 m–7.5 m
- 7.5 m+

Figure 13A

	MUSEUM AND LOCATION	*CHANGE*	*2013*	*2012*	*ENTRY*
1	NATIONAL MUSEUM OF NATURAL HISTORY, Washington DC	5.3%	8,000,000	7,600,000	FREE
2	NATIONAL AIR AND SPACE MUSEUM , Washington DC	2.5%	6,970,000	6,800,000	FREE
3	THE METROPOLITAN MUSEUM OF ART, New York NY	2.7%	6,280,000	6,116,000	PAID
4	AMERICAN MUSEUM OF NATURAL HISTORY, New York NY	0.0%	5,000,000	5,000,000	PAID
5	NATIONAL MUSEUM OF AMERICAN HISTORY, Washington DC	2.1%	4,900,000	4,800,000	FREE
6	NATIONAL GALLERY OF ART, Washington DC	-2.4%	4,100,000	4,200,000	FREE
7	THE MUSEUM OF MODERN ART, New York NY	0.0%	2,800,000	2,800,000	PAID
8	CALIFORNIA SCIENCE CENTER, Los Angeles CA	31.5%	2,630,000	2,000,000	FREE
9	HOUSTON MUSEUM OF NATURAL SCIENCE, Houston TX	0.0%	2,133,000	2,219,000	PAID
10	THE ART INSTITUTE OF CHICAGO, Chicago IL	2.7%	1,500,000	1,461,000	PAID
11	MUSEUM OF SCIENCE, Boston MA	-5.3%	1,420,000	1,500,000	PAID
12	CALIFORNIA ACADEMY OF SCIENCES, San Francisco CA	0.0%	1,400,000	1,400,000	PAID
13	MUSEUM OF SCIENCE AND INDUSTRY, Chicago IL	-6.7%	1,400,000	1,500,000	PAID
14	U.S. HOLOCAUST MEMORIAL MUSEUM, Washington DC	-1.9%	1,374,000	1,400,000	PAID
15	NATIONAL MUSEUM OF THE AMERICAN INDIAN, Washington DC	-14.8%	1,363,000	1,600,000	FREE
16	THE J. PAUL GETTY MUSEUM, Los Angeles CA	4.3%	1,356,000	1,300,000	FREE
17	UDVAR-HAZY CENTER, Washington DC	-7.1%	1,300,000	1,400,000	FREE
18	DENVER MUSEUM OF NATURE & SCIENCE, Denver CO	4.0%	1,300,000	1,250,000	PAID
19	FIELD MUSEUM OF NATURAL HISTORY, Chicago IL	7.2%	1,286,000	1,200,000	PAID
20	THE CHILDREN'S MUSEUM OF INDIANAPOLIS, Indianapolis IN	-4.3%	1,215,000	1,270,000	PAID
TOTAL		**1.6%**	**57,727,000**	56,816,000	

Figure 13B

1.6%

2013–12 top 20 museums North America attendance growth

57.7m

2013 top 20 museums North America attendance

56.8m

2012 top 20 20 museums North America attendance

TOP 20 MUSEUMS ASIA-PACIFIC

Where are the top 20 museums in Asia-Pacific?

Figure 14A

	MUSEUM AND LOCATION	CHANGE	2013	2012	PAID
1	NATIONAL MUSEUM OF CHINA, Beijing, China	38.7%	7,450,000	5,370,000	FREE
2	NATIONAL PALACE MUSEUM (TAIWAN), Taipei, Taiwan	1.2%	4,412,000	4,361,000	PAID
3	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, Shanghai, China	11.5%	3,580,000	3,210,000	PAID
4	NATIONAL MUSEUM OF NATURAL SCIENCE, Taichung, Taiwan	15.0%	3,396,000	2,954,000	PAID
5	NATIONAL MUSEUM OF KOREA, Seoul, South Korea	-2.4%	3,053,000	3,128,000	FREE
6	CHINA SCIENCE TECHNOLOGY MUSEUM, Beijing, China	3.8%	3,020,000	2,910,000	PAID
7	NATIONAL FOLK MUSEUM OF KOREA, South Korea	2.5%	2,706,000	2,640,000	FREE
8	NATIONAL MUSEUM OF NATURE AND SCIENCE, Japan	20.2%	2,420,000	2,014,000	PAID
9	NATIONAL ART CENTER, Tokyo, Japan	15.0%	2,346,000	2,040,000	PAID
10	NATIONAL SCIENCE & TECHNOLOGY MUSEUM, Kaohsiung, Taiwan	4.1%	2,265,000	2,175,000	PAID
11	ZHEJIANG MUSEUM, Hangzhou, China	75.0%	2,258,000	1,290,000	FREE
12	CHINA THREE GORGES MUSEUM (CHONGQUING MUSEUM), Chongqing, China	14.0%	2,030,000	1,781,000	FREE
13	HENAN MUSEUM, Zhengzhou, China	-1.0%	2,030,000	2,050,000	FREE
14	SHANGHAI MUSEUM, Shanghai, China	0.1%	1,946,000	1,945,000	PAID
15	NATIONAL GALLERY OF VICTORIA, Sydney, Australia	23.6%	1,942,000	1,571,000	FREE
16	NATIONAL PALACE MUSEUM OF KOREA, Seoul, South Korea	118.8%	1,847,000	844,000	FREE
17	HONG KONG SCIENCE MUSEUM, Hong Kong	33.4%	1,719,000	1,289,000	PAID
18	NATIONAL SCIENCE MUSEUM, Pathum Thani, Thailand	-2.1%	1,621,000	1,655,000	PAID
19	SCIENCE CITY, Kolkata, India	0.1%	1,538,000	1,537,000	PAID
20	SUZHOU MUSEUM, Suzhou, China	0.3%	1,445,000	1,440,000	FREE
TOTAL		**27.6%**	**53,024,000**	**41,568,000**	

Figure 14B

27.6%

2013–12 top 20 museums Asia-Pacific attendance growth

53.0m

2013 top 20 20 museums Asia-Pacific attendance

41.6m

2012 top 20 museums Asia-Pacific attendance

TOP 20 MUSEUMS EUROPE

Where are the top 20 museums in Europe?

Figure 15A

	MUSEUM AND LOCATION	CHANGE	2013	2012	ENTRY
1	LOUVRE, Paris, France	-4.0%	9,334,000	9,720,000	PAID
2	BRITISH MUSEUM, London, U.K.	20.2%	6,701,000	5,576,000	FREE
3	NATIONAL GALLERY, London, U.K.	16.8%	6,031,000	5,164,000	FREE
4	VATICAN MUSEUMS, Vatican, Vatican	7.8%	5,459,000	5,065,000	PAID
5	NATURAL HISTORY MUSEUM, London, U.K.	6.4%	5,250,000	4,936,000	FREE
6	TATE MODERN, London, U.K.	-8.2%	4,885,000	5,319,000	FREE
7	CENTRE POMPIDOU, Paris, France	-1.4%	3,745,000	3,800,000	PAID
8	MUSEE D'ORSAY, Paris, France	-2.7%	3,482,000	3,579,000	PAID
9	SCIENCE MUSEUM (SOUTH KENSINGTON), London, U.K.	10.9%	3,317,000	2,990,000	FREE
10	VICTORIA & ALBERT MUSEUM, London, U.K.	1.8%	3,290,000	3,232,000	FREE
11	REINA SOFIA, Madrid, Spain	23.8%	3,185,000	2,572,000	PAID
12	STATE HERMITAGE, St Petersburg, Russia	8.3%	3,120,000	2,882,000	PAID
13	TOWER OF LONDON, London, U.K.	18.5%	2,895,000	2,444,000	PAID
14	CITE DES SCIENCES ET DE L'INDUSTRIE, Paris, France	-2.7%	2,570,000	2,641,000	PAID
15	MUSEO NACIONAL DEL PRADO, Madrid, Spain	-14.9%	2,307,000	2,712,000	PAID
16	RIJKSMUSEUM, Amsterdam, Netherlands	NA	2,200,000	NA	FREE
17	NATIONAL PORTRAIT GALLERY, London, U.K.	-3.9%	2,015,000	2,097,000	FREE
18	GALLERIA DEGLI UFFIZI, Florence, Italy	6.0%	1,876,000	1,769,000	PAID
19	NATIONAL MUSEUM OF SCOTLAND, Edinburgh, U.K.	-6.7%	1,768,000	1,894,000	FREE
20	TATE BRITAIN, London, U.K.	-10.2%	1,378,000	1,534,000	FREE
TOTAL		**4.6%**	**74,808,000**	**71,536,000**	

Figure 15B

4.6%

2013–12 top 20 museums Europe attendance growth

74.8m

2013 top 20 museums Europe attendance

71.5m

2012 top 20 museums Europe attendance

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.

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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.

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