Economics

AECOM

2012 THEME INDEX

2012 MUSEUM INDEX

Global Attractions Attendance Report

TEA

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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.

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2012THEME INDEX

2012 MUSEUM INDEX

THE BIG PICTURE

Interview with John Robinett
Senior Vice President, Economics

Optimism and economic recovery, Asia starts to pull ahead of North America, and Museums join the mix.

In broad strokes, what kind of a year did the global theme park/water park industry have in 2012?

5.2%

Global increase in attendance to theme parks from 2012

The European, Asian, and North American major operators all had a successful year with an average attendance increase of 6.7% at the top ten global operators. In Asia and North America attendance was strong, with each over 3%. Europe, which is still in recession, experienced softer numbers. It is our view that, given the economic conditions, theme parks have done a good job this year in maintaining single digit growth in major markets.

The market in North America was, this year as last year, driven by major reinvestment at major operators' parks. Last year, Orlando led the way with The Wizarding World of Harry Potter at Universal Studios Florida. This year, it was Southern California, with substantial increases at Disney California Adventure (where additions included Cars Land) as well as Universal Studios Hollywood (which added Transformers: the Ride 3-D).

The European, Asian and North American major operators all had a successful year.

In Asia there has been double digit growth on the part of leading international and domestic operators. Hong Kong Disney and Universal Studios Japan were up 14%. Lotte World, Chimelong and other major parks saw tremendous growth as well.

Europe's theme parks experienced, for the most part, some small gains and some small losses, consistent with the region's economic malaise. But in the midst of that were some inspiring successes. Parc Asterix, Legoland Windsor and Puy du Fou all benefited from smart reinvestment in attractions as well as marketing, reaping attendance increases ranging from 5 to 8%.

16m

Top 15 Asia-Pacific waterparks total attendance in 2012

The water parks business grew in both North America and Asia. We forecasted in last year's Theme Index that the industry in Asia would begin to outpace the industry in North America; in the water parks we track, we've seen the first clear sign of it. Our water park figures show that the Asian attendance totals have for the first time surpassed those of North America. The Asian water parks market showed 7.4% growth with total attendance at 16 million, about 1 million more than North America. Especially strong performance was seen in China and Southeast Asia.

When do you forecast Asian theme park attendance will overtake North America?

10m

Expected attendance in first year at Shanghai Disney, opening in 2015

I wouldn't want to box myself into predicting a specific year, but we will hit a milestone with the opening of Shanghai Disney in 2015. Assuming that the Shanghai Disney opening will be consistent with the openings of other major Disney parks in large international markets, it's reasonable to expect something in the neighborhood of 10 million attendance in its first year. It will be the largest theme park development in China to date and can be expected to put Asia within striking distance of surpassing North American theme park attendance totals.

Weather was a big factor holding back attendance growth in European theme parks in 2012. Should operators consider climate patterns when they think about reinvestment to boost growth?

If exposure to extreme or uncomfortable weather conditions is keeping visitors away, it's worth addressing the issue with careful and thoughtful investment. The cost of creating comfort should create commensurate benefits. Short of enclosing a property outright, there are plenty of options that can provide relief to guests, such as shade structures, landscaping, misters, air-conditioned theaters, and outdoor heaters.

What are some important trends as Asia grows toward global dominance in visitor attractions?

Asia brought something new to the destination resort mix by incorporating casinos and cultural facilities along with theme parks, retail and hospitality, what they call "integrated resorts". This broader spectrum of elements has been very successful in their markets. It's a business model of cross subsidization, with the high cash flow casinos supporting the lower cash flow cultural elements.

Is the Middle East attractions market making a comeback?

What's happening in the Middle East, especially Dubai and Abu Dhabi, reflects the overall, worldwide return to a positive outlook in attractions markets. There is more optimism now, a lot of interesting projects being planned, and expectation of future growth and expansion. One unique factor is demographics, in some Middle East countries, people are much younger than in other markets.

What's happening in the Middle East, especially Dubai and Abu Dhabi, reflects the overall, worldwide return to a positive outlook in attractions markets.

This year's Theme Index includes attendance numbers for top museums in Europe, North America and Asia. Why has AECOM begun to track museums?

Museums represent a very important category of the leisure market with clear commonalities to commercial attractions. They compete for people's time and money in similar markets; they cater to families; they help drive tourism; and they play a cultural and economic role in their communities. Increasingly, museums are focusing on the guest experience, operations, and marketing in ways that mirror commercial attractions. While their markets are not identical, they overlap and are similar in scale. Both court group attendance.

Although museums are nonprofit entities with educational missions, earned revenue streams are important to them — especially as government funding sources have receded. Tracking their attendance from year to year and studying the growth factors, as we do with theme parks and water parks, will help convey a picture of the dynamics that is instructive to both sectors.

Tracking museums in addition to theme parks puts Europe in a different light. While Europe came in last for theme park attendance compared to other major global markets in 2012, it was first in museums. In Europe, the top museums get more visitation than do theme parks: 72 million total attendance for museums versus 58 million for theme parks. Further, museum attendance was up 5% in Europe, where theme parks were flat.

Increasingly museums are focusing on the guest experience, operations, and marketing in ways that mirror commercial attractions.

Although museums are nonprofit entities with educational missions, earned revenue streams are important to them — especially as government funding resources have receded.

AECOM and TEA, the producers of this report, are both very active within the museum community. AECOM is interested in helping operators improve how they track and analyze their audiences and operations to better achieve their missions, serve their communities and maximize the bottom line. IAAPA's annual Museum Day, set up specifically for this kind of information exchange, is one of the forums in which we regularly participate.

For its part, TEA recognizes museums as a significant client market for its members, and reaches out to museum operators to honor excellence in the field with its Thea Awards. Museums and museum exhibits that have been honored with Thea Awards include Canada's Sports Hall of Fame, the Coal Mine and the U-505 exhibits at MSI Chicago and Beyond All Boundaries at the National World War II Museum. Museums can achieve dramatic attendance growth through reinvestment and improvement of the guest experience — it's just as true for them as it is for theme parks.

We'll be publishing museum attendance numbers as part of the TEA/AECOM Theme Index every year from now on, and we hope to receive feedback from the community. We welcome comments, questions and suggestions — and of course you should contact us if you believe your facility belongs on the list.

2012 THEME INDEX

Top 10 theme park groups worldwide

	PARK , location	change	2012	2011
1	WALT DISNEY ATTRACTIONS	4.7%	126,479,000	121,821,000
2	MERLIN ENTERTAINMENTS GROUP	16.4%	54,000,000	46,400,000
3	UNIVERSAL STUDIOS RECREATION GROUP	7.9%	34,515,000	31,990,000
4	PARQUES REUNIDOS	3.5%	27,130,000	26,220,000
5	SIX FLAGS INC.	6.0%	25,750,000	24,300,000
6	SEAWORLD PARKS & ENTERTAINMENT	3.0%	24,310,000	23,600,000
7	CEDAR FAIR ENTERTAINMENT COMPANY	0.9%	23,600,000	23,400,000
8	OCT PARKS CHINA	7.5%	23,359,000	21,731,000
9	HAICHANG GROUP	24.5%	9,400,000	7,550,000
10	COMPAGNIE DES ALPES	1.0%	9,300,000	9,210,000

Figure 1

6.7%

2012–11 top 10 theme park groups worldwide growth

357.8m

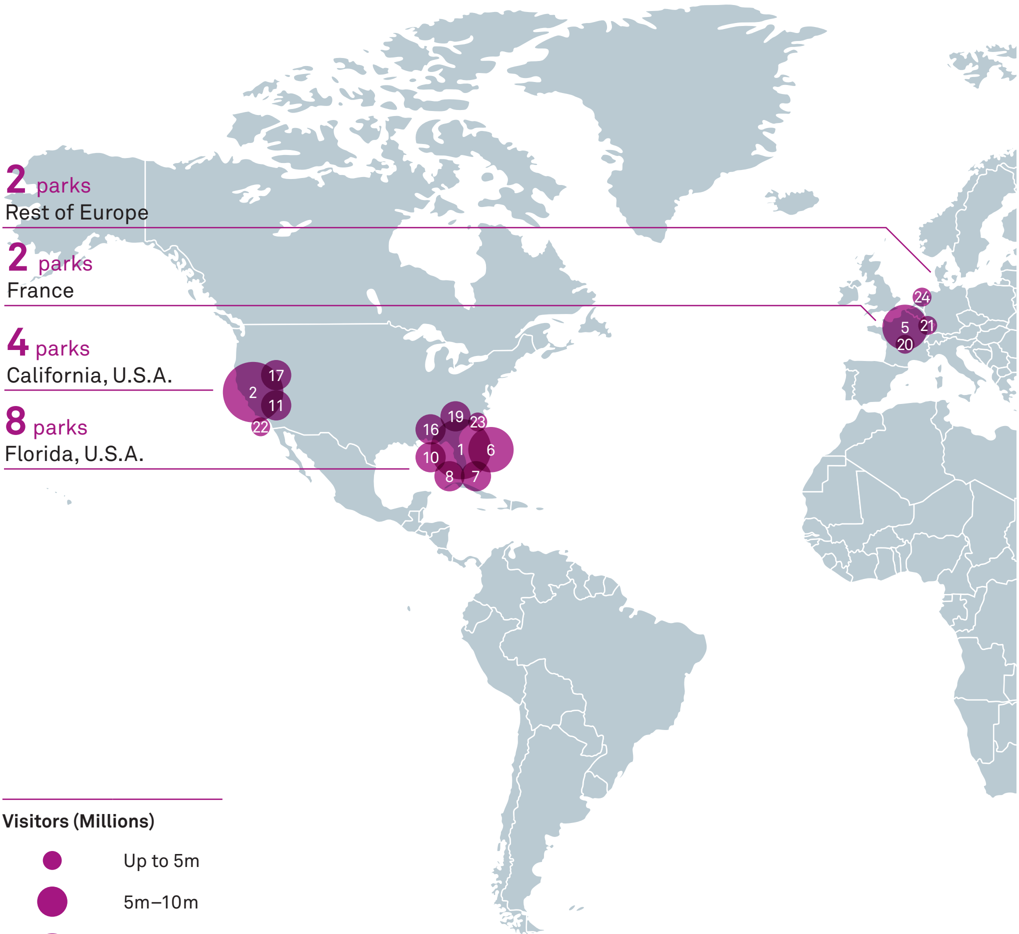
2012 top 10 theme park groups worldwide attendance

335.2m

2011 top 10 theme park groups worldwide attendance

Top 25 amusement/theme parks worldwide

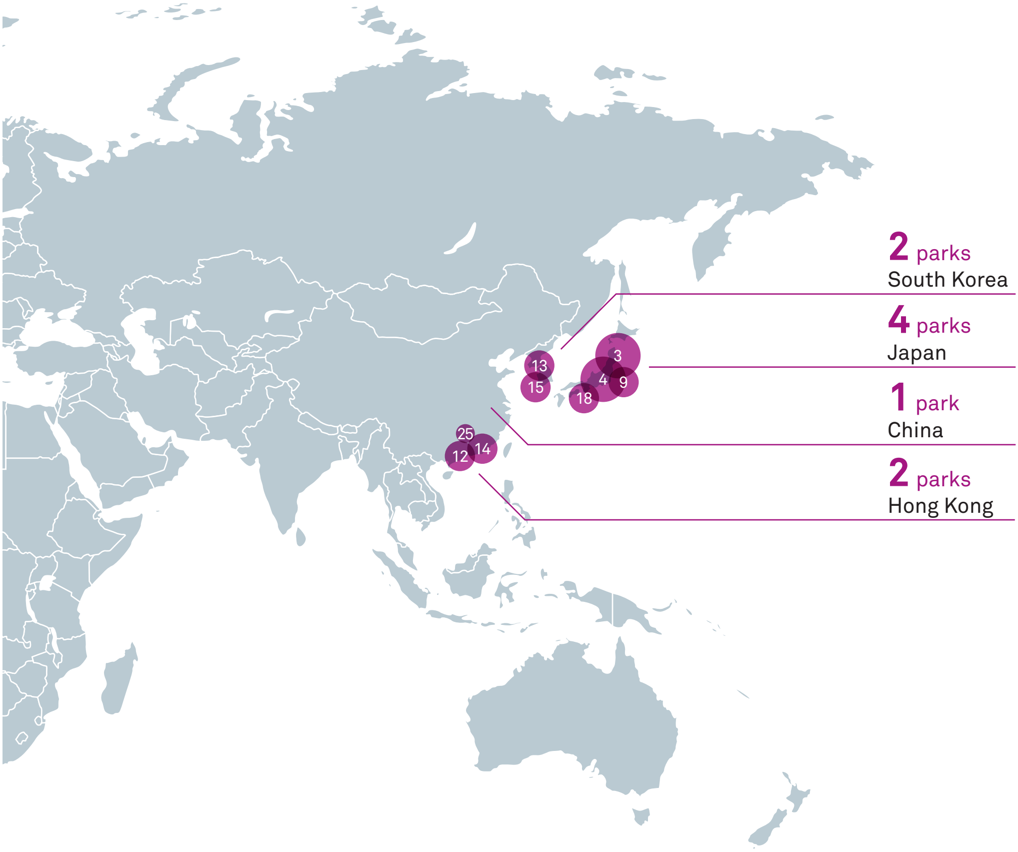
Where are the top 25 amusement/ theme parks worldwide?



Visitors (Millions)

- Up to 5m
- 5m–10m
- 10m–15m
- 15m+

Figure 2A



5.2%

2012–11 top 25 amusement / theme parks worldwide growth

205.9m

2012 top 25 amusement / theme parks worldwide attendance

195.7m

2011 top 25 amusement / theme parks worldwide attendance

Top 25 amusement/theme parks worldwide

	PARK , location	change	2012	2011
1	MAGIC KINGDOM at Walt Disney World, Lake Buena Vista, Florida	2.3%	17,536,000	17,142,000
2	DISNEYLAND Anaheim, California	-1.1%	15,963,000	16,140,000
3	TOKYO DISNEYLAND Tokyo, Japan	8.5%	14,847,000	13,683,000
4	TOKYO DISNEY SEA Tokyo, Japan	8.5%	12,656,000	11,664,000
5	DISNEYLAND PARK AT DISNEYLAND PARIS Marne-La-Vallée, France	1.9%	11,200,000	10,990,000
6	EPCOT at Walt Disney World, Lake Buena Vista, Florida	2.2%	11,063,000	10,825,000
7	DISNEY'S ANIMAL KINGDOM at Walt Disney World, Lake Buena Vista, Florida	2.2%	9,998,000	9,783,000
8	DISNEY'S HOLLYWOOD STUDIOS at Walt Disney World, Lake Buena Vista, Florida	2.2%	9,912,000	9,699,000
9	UNIVERSAL STUDIOS JAPAN Osaka, Japan	14.1%	9,700,000	8,500,000
10	ISLANDS OF ADVENTURE at Universal Orlando, Florida	4.0%	7,981,000	7,674,000
11	DISNEY'S CALIFORNIA ADVENTURE Anaheim, California	22.6%	7,775,000	6,341,000
12	OCEAN PARK Hong Kong SAR	6.9%	7,436,000	6,955,000
13	EVERLAND Gyeonggi-Do, South Korea	4.3%	6,853,000	6,570,000
14	HONG KONG DISNEYLAND Hong Kong SAR	13.6%	6,700,000	5,900,000
15	LOTTE WORLD Seoul, South Korea	10.4%	6,383,000	5,780,000

	PARK , location	change	2012	2011
16	UNIVERSAL STUDIOS at Universal Orlando, Florida	2.5%	6,195,000	6,044,000
17	UNIVERSAL STUDIOS HOLLYWOOD Universal City, California	15.0%	5,912,000	5,141,000
18	NAGASHIMA SPA LAND Kuwana, Japan	0.5%	5,850,000	5,820,000
19	SEAWORLD FLORIDA Orlando, Florida	3.0%	5,358,000	5,202,000
20	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS Marne-La-Vallee, France	1.9%	4,800,000	4,710,000
21	EUROPA PARK Rust, Germany	2.2%	4,600,000	4,500,000
22	SEAWORLD CALIFORNIA San Diego, California	3.5%	4,444,000	4,294,000
23	BUSCH GARDENS TAMPA BAY Tampa, Florida	1.5%	4,348,000	4,284,000
24	DE EFTELING Kaatsheuvel, Netherlands	1.8%	4,200,000	4,125,000
25	OCT EAST Shenzhen, China	7.9%	4,196,000	3,890,000

Figure 2B

Top 20 water parks worldwide

Where are the top 20 water parks worldwide?

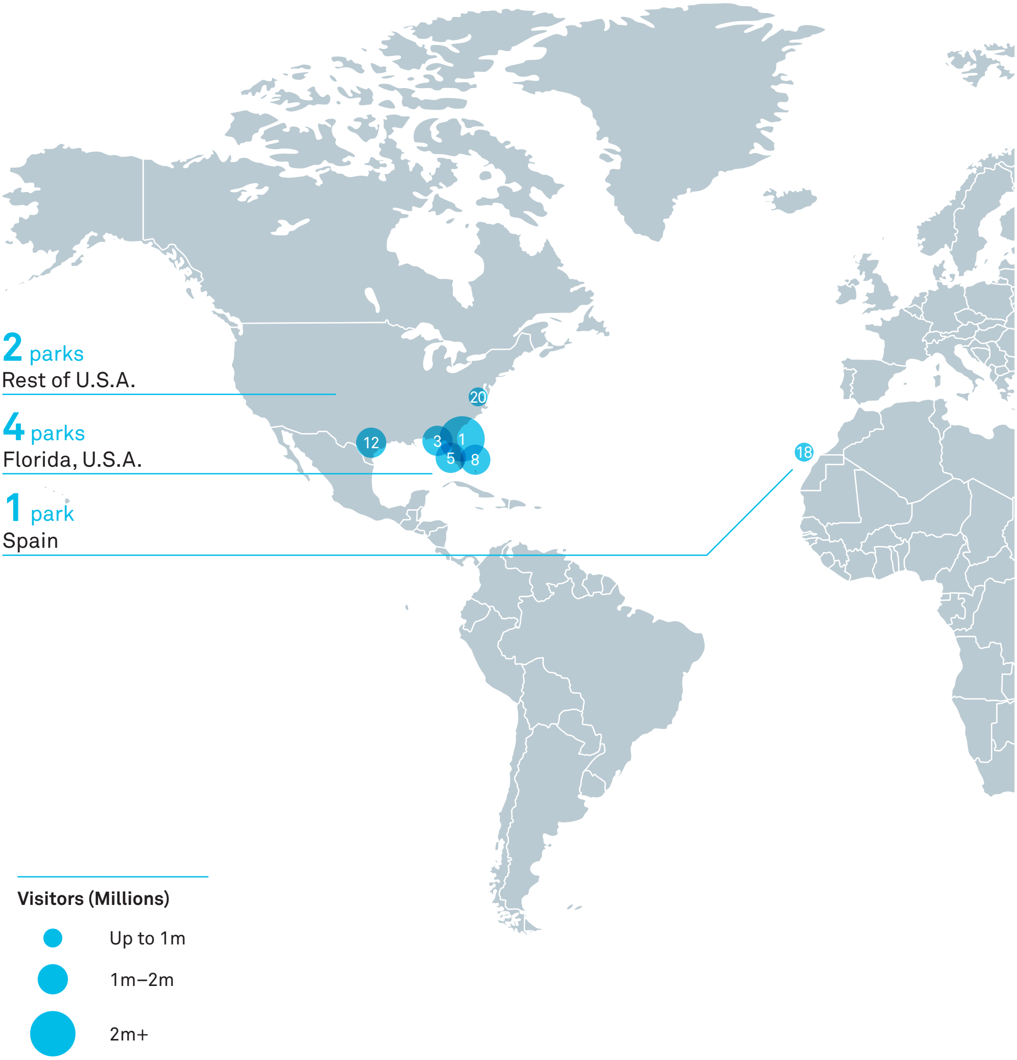
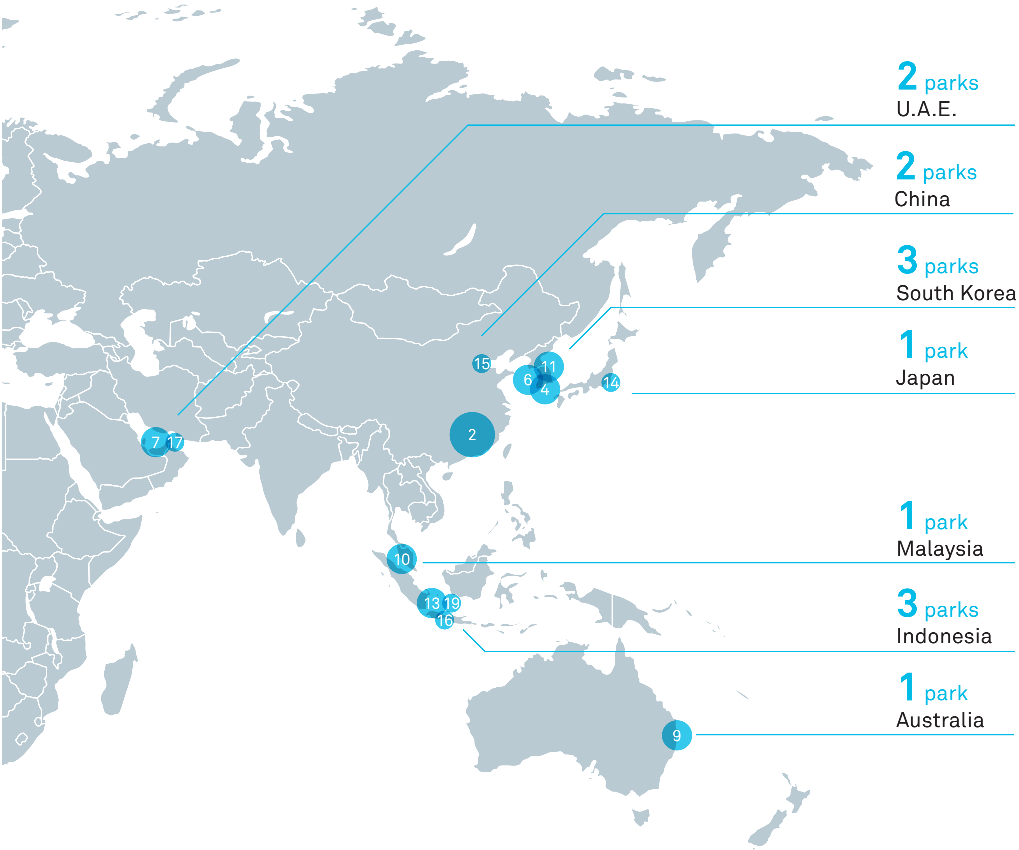


Figure 3A



5.4%

2012–11 top 25 amusement / theme parks worldwide growth

25.0m

2012 top 25 amusement / theme parks worldwide attendance

23.7m

2011 top 25 amusement / theme parks worldwide attendance

Top 20 water parks worldwide

	PARK , location	change	2012	2011
1	TYPHOON LAGOON AT DISNEY WORLD Orlando, FL, U.S.A.	2.0%	2,100,000	2,058,000
2	CHIMELONG WATERPARK Guangzhou, China	6.4%	2,021,000	1,900,000
3	BLIZZARD BEACH AT DISNEY WORLD Orlando, FL, U.S.A.	2.0%	1,929,000	1,891,000
4	OCEAN WORLD, Gangwon-Do, South Korea	-0.3%	1,720,000	1,726,000
5	AQUATICA Orlando, FL, U.S.A.	2.5%	1,538,000	1,500,000
6	CARIBBEAN BAY Gyeonggi-Do, South Korea	0.7%	1,508,000	1,497,000
7	AQUAVENTURE Dubai, U.A.E.	8.3%	1,300,000	1,200,000
8	WET 'N WILD Orlando, FL, U.S.A.	2.0%	1,247,000	1,223,000
9	WET N WILD GOLD COAST Gold Coast, QLD, Australia	0.0%	1,200,000	1,200,000
10	SUNWAY LAGOON Kuala Lumpur, Malaysia	15.4%	1,200,000	1,040,000
11	RESOM SPA CASTLE Chungcheongnam-Do, South Korea	12.0%	1,158,000	1,034,000
12	SCHLITTERBAHN New Braunfels, TX, U.S.A.	3.6%	1,017,000	982,000

	PARK , location	change	2012	2011
13	ATLANTIS WATER ADVENTURE Jakarta, Indonesia	5.3%	1,000,000	950,000
14	SUMMERLAND Tokyo , Japan	13.1%	990,000	875,000
15	HAPPY MAGIC WATER CUBE Beijing, China	26.0%	968,000	768,000
16	THE JUNGLE WATER ADVENTURE Bogor, West Java, Indonesia	9.2%	951,000	871,000
17	WILD WADI WATER PARK Dubai, U.A.E.	-3.4%	860,000	890,000
18	SIAM WATER PARK Tenerife, Spain	0.0%	800,000	800,000
19	OCEAN PARK WATER ADVENTURE Jakarta, Indonesia	25.0%	750,000	600,000
20	WATER COUNTRY USA Williamsburg, VA, U.S.A.	3.5%	748,000	723,000

Figure 3B

THE AMERICAS

Interview with
Brian Sands
Vice President,
Economics,
Americas

Continued growth and economic recovery

Overall growth in the North American theme park market was substantial in 2012, with 131.6 million visits to the top 20 theme parks, equal to 4.6 million more visits or 3.6 percent higher than 2011. This is the second consecutive year recently with growth of around three percent.

131.6m

Top 20 theme/amusement parks in North America attendance in 2012 — an increase of **3.6%** since 2011

Latin America's top theme/amusement and water parks saw 13.2 million visits in 2012, representing growth of 2.6 percent or 336,000 visits — a jump in comparison to 2011's very modest growth. The water park market in North America grew comparably, to 15.4 million visits in 2012, up 2.2 percent or 332,000 visits. These numbers indicate strong resurgence after a flat performance in 2011, which was primarily due to the impact of Hurricane Irene on the East Coast that August.

13.2m

Top 10 theme/amusement parks in Latin America attendance in 2012 — an increase of **2.6%** since 2011

How does the North American theme park recovery look if you trace it back to the start of the recession?

7.0%

Top 20 theme/amusement parks in North America growth in attendance since 2007–2008

The North American theme park market is now up by about 9 million visits or about 7.0 percent versus approximately 123 million visits in 2007 and 2008. This second year of solid growth is very encouraging.

How does the North American theme park attendance growth of 3.6 percent look against other relevant statistics?

Interesting figures to compare with include 2.2 percent growth of US gross domestic product (GDP) in 2012 and 1.4 percent growth at the National Parks Service (NPS). In the other direction, admissions at US movie theaters reportedly increased by 4.1 percent in 2012.

232.8m

The National Parks Service (NPS) 2012 attendance — an increase of **2.2%** since 2011

National parks are a day- or multi-day activity that benefited during the recession. NPS, which is one of the single largest leisure industry operators in the US, reported 282.8 million visits in 2012 and 278.9 million in 2011. With continued economic recovery, the NPS numbers may begin to flatten out — and theme park numbers keep rising — as people return to previous vacation and spending patterns. Attendance at movie theaters is still down from the historic highs of the early 2000s.

In 2011, the outstanding success of Wizarding World of Harry Potter at Universal Studios Florida gave a huge lift to the North America attendance totals. Is growth more evenly distributed this year?

Yes. Together, three parks from global leaders — Disney California Adventure, Universal Studios Hollywood, and Magic Kingdom at Walt Disney World — accounted for 57 percent of the increase in visits to the top 20 parks in North America in 2012.

Overall growth in North American theme park market was substantial in 2012.

A lot of that growth was, as expected, driven by re-investment — the eternal necessity to drive additional attendance.

Disneyland Resort in Anaheim had 23.7 million visits in 2012, an increase of 1.3 million visits versus 2011. This increase was driven by the opening of Cars Land at Disney California Adventure which boosted total visits to the park to 7.8 million, a remarkable jump of 1.4 million. Cars Land was recently honored by TEA with a Thea Award for Outstanding Achievement. The large increase in attendance at Disney California Adventure was partly supported by a shift in attendance from Disneyland, which experienced a slight decline in attendance to just under 16 million visits.

7.8m

Disney California Adventure attendance in 2012 — an increase of **22.6%** since 2011

Universal Studios parks performed strongly again in 2012. Transformers: The Ride 3-D at Universal Studios Hollywood helped attract 5.9 million visits, a jump of over three-quarters of a million, moving the park up to ninth position on the North American Top 20, ahead of SeaWorld Florida which itself had respectable growth of 3.0 percent. Transformers: The Ride 3-D earned awards from TEA and the International 3D Society.

Disney World Resort in Orlando maintained its worldwide dominance at 48.5 million+ visits. Magic Kingdom increased by nearly 400,000 visits thanks to several new and renovated attractions, including The Barnstormer, Sorcerers of the Magic Kingdom, Fantasyland, Little Mermaid, and Dumbo the Flying Elephant. Other additions to Disney's Orlando presence include the Richard Petty Driving Experience and the Art of Animation Resort.

48.5m

Disney World Resort, Orlando visitors in 2012 — an increase of **2.2%** since 2011

Were there any significant attendance declines among the top performing North American parks in 2012?

The only decline to note was at Knott's Berry Farm, due to the closure for redevelopment of Perilous Plunge and associated areas. We look forward to the reopening of this part of the park. Knott's parent chain is Cedar Fair, and other Cedar Fair properties are doing well under the leadership of the new CEO, Matt Ouimet.

1.5m

Beto Carrero World, Brazil attendance in 2012 — an increase of **42.9%** since 2011

1.2m

Parque Plaza Sesamo, Mexico visitors in 2012 — an increase of **33%** since 2011

2.2%

Top 20 waterparks in North America increase in attendance since 2011

Tell us about the ups and downs of the Latin American market.

Overall, Latin America is growing. The market is now up by about 1 million visits or about 8.2 percent to 13.2 million, versus the approximately 12.2 million visits to Latin American parks in 2007 and 2008.

The leader in growth was Beto Carrero World (Penha, Brazil) with 450,000 additional visits for a total of 1.5 million, helped by numerous new cinema-branded attractions (Kung Fu Panda, Madagascar, Shrek) plus a strong marketing program. Parque Plaza Sesamo in Monterrey, Mexico, also reported substantial growth of nearly 300,000 new visits, reaching nearly 1.2 million. The closure of the historic Playcenter in Sao Paulo paved the way for Beach Park in Aquiraz, Brazil to join the Latin America Top 10 list, with 843,000 visits in 2012 — a solid increase of 55,000 over the previous year.

A number of Latin American parks had challenges in 2012. Hopi Hari in Sao Paulo, Brazil, experienced its second consecutive decline with1.63 million visits (down 12 percent). The park was closed for a month due to the accidental death of a visitor on a ride. Bad weather was primarily responsible for declines at Parque Mundo Aventura and Salitre Magico in Bogota, and Fantasialandia in Santiago.

What are some key points for North American waterparks?

Orlando market leaders — Typhoon Lagoon, Blizzard Beach, and Aquatica — all benefited from the 2.2 percent increase in tourism to that area in 2012. Elsewhere, major reinvestments paid off. In New Braunfels, Texas, Schlitterbahn opened The Falls - identified as the longest water park ride in the world and raising visitation past one million. Splish Splash in Calverton, New York, added a new wave pool and grew attendance by 31,000 to reach 463,000 visits.

> Overall, Latin America is growing, but unfortunately a number of Latin American parks had challenges in 2012.

As this part of the world continues to pull out of recession, we should see a return to people taking longer vacations and traveling further.

Six Flags Hurricane Harbor in Jackson, New Jersey added two new rides, with visits increasing to 424,000. East Coast parks also benefited from the bounceback after the impact of Hurricane Irene.

Despite good weather and a major new ride, The Mile High Flyer, Hyland Hills Water World in Denver experienced a decline in visitation due apparently to a combination of a sluggish regional economy and a significant rise in the entry charge in 2012.

-3.8%

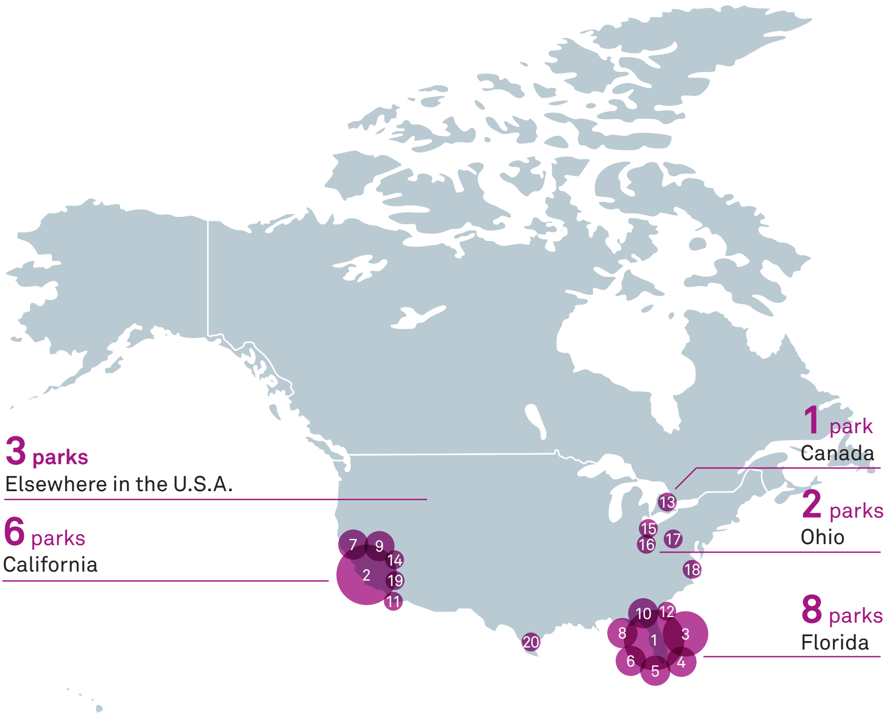
Hyland Hills Water World, Denver, decrease in attendance since 2011

What trends are you seeing now that may influence future performance?

As this part of the world continues to pull out of recession, we should see a return to people taking longer vacations and traveling further. Sensitivity on pricing is going to remain for a while — however, with technologies and practices such as online ticketing, installment payments and credit wristbands parks are finding ways to cross psychological spending barriers. It's important that visitors perceive value for their money. Discounting and packaging will continue to be important. There is room for additional, specialized, add-on and VIP experiences in attractions and we should continue to see more of those. As urbanization and globalization continue apace, I also think profitable new categories of attractions — such as observation decks — will continue to emerge and compliment the well-established theme and water park market.

Top 20 Amusement/Theme Parks in North America

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



Visitors (Millions)

- Up to 5m
- 5m–10m
- 10m–15m
- 15m+

Figure 4A

3.6%
2012–11 North America top 20 amusement / theme parks growth

131.5m
2012 North America top 20 amusement / theme parks attendance

127m
2011 North America top 20 amusement / theme parks attendance

	PARK , location	change	2012	2011
1	MAGIC KINGDOM at Walt Disney World, Lake Buena Vista, FL, U.S.A.	2.3%	17,536,000	17,142,000
2	DISNEYLAND Anaheim, CA, U.S.A.	-1.1%	15,963,000	16,140,000
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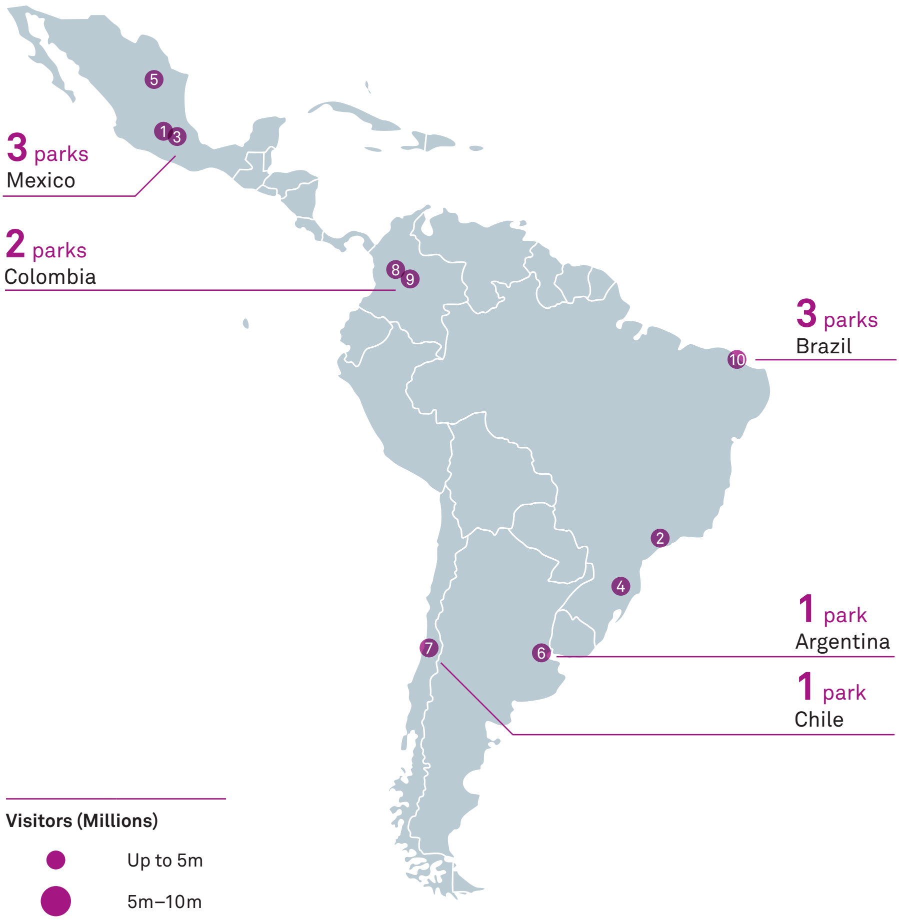
11	SEAWORLD CALIFORNIA San Diego, CA, U.S.A.	3.5%	4,444,000	4,294,000
12	BUSCH GARDENS TAMPA BAY Tampa, FL, U.S.A.	1.5%	4,348,000	4,284,000
13	CANADA'S WONDERLAND Maple, ON, Canada	5.0%	3,655,000	3,481,000
14	KNOTT'S BERRY FARM Buena Park, CA, U.S.A.	-4.0%	3,508,000	3,654,000
15	CEDAR POINT Sandusky, OH, U.S.A.	2.5%	3,221,000	3,143,000
16	KINGS ISLAND Kings Island, OH, U.S.A.	2.0%	3,206,000	3,143,000
17	HERSHEY PARK Hershey, PA, U.S.A.	6.5%	3,140,000	2,949,000
18	BUSCH GARDENS EUROPE Williamsburg, VA, U.S.A.	4.0%	2,854,000	2,744,000
19	SIX FLAGS MAGIC MOUNTAIN Valencia, CA, U.S.A.	4.0%	2,808,000	2,700,000
20	SEAWORLD SAN ANTONIO, TX San Antonio, TX, U.S.A.	3.0%	2,678,000	2,600,000

Figure 4B

Top 10 amusement/theme parks in Latin America

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



Visitors (Millions)

- Up to 5m
- 5m–10m
- 10m–15m
- 15m+

Figure 5A

2.6%

2012–11 Latin America top 10 amusement / theme parks growth

13.2m

2012 Latin America top 10 amusement / theme parks attendance

12.9m

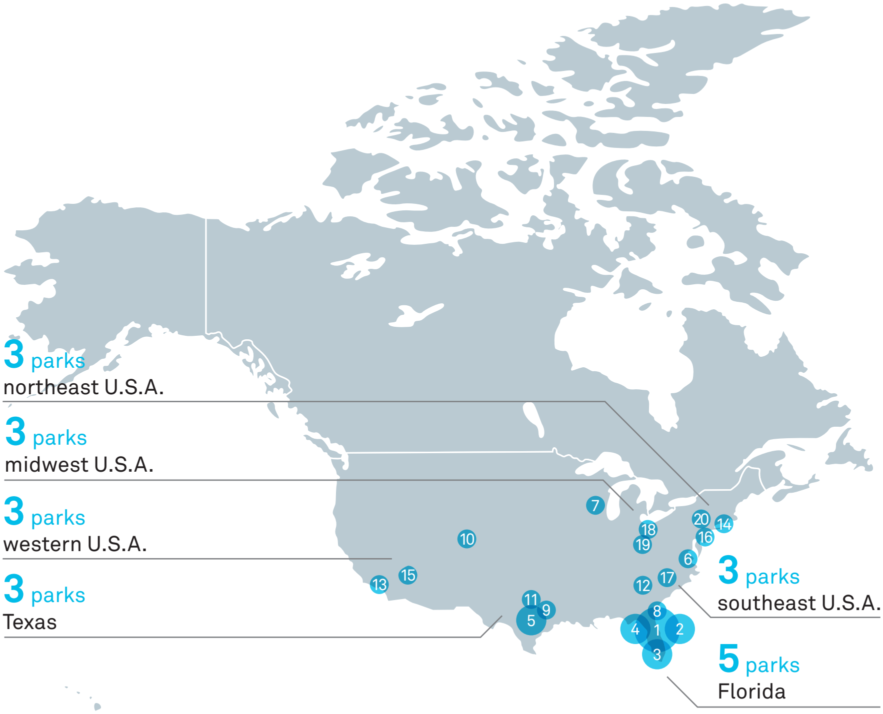
2011 Latin America top 10 amusement / theme parks attendance

	PARK , location	change	2012	2011
1	SIX FLAGS MEXICO Mexico City, Mexico	**5.0%**	**2,310,000**	2,200,000
2	HOPI HARI São Paulo, Brazil	**-12.0%**	**1,628,000**	1,850,000
3	LA FERIA DE CHAPULTEPEC Mexico City, Mexico	**2.0%**	**1,537,000**	1,507,000
4	BETO CARRERO WORLD Santa Catarina, Brazil	**42.9%**	**1,500,000**	1,050,000
5	PLAZA PLAZA SESAMO Monterrey, Mexico	**33.0%**	**1,197,000**	900,000
6	PARQUE DE LA COSTA Tigre, Argentina	**1.0%**	**1,091,000**	1,080,000
7	FANTASIALANDIA Santiago, Chile	**-9.3%**	**1,070,000**	1,180,000
8	PARQUE MUNDO AVENTURA Bogotá, Colombia	**-11.8%**	**1,065,000**	1,208,000
9	EL SALITRE MAGICO Bogotá, Colombia	**-13.0%**	**958,000**	1,101,000
10	BEACH PARK Fortaleza, Brazil	**7.0%**	**843,000**	788,500

Figure 5B

Top 20 water parks in North America

Where are the top 20 water parks in North America?



Visitors (Millions)

- Up to 1m
- 1m–2m
- 2m+

Figure 6A

2.2%
2012–11 North America top 20 water parks growth

15.4m
2012 North America top 20 water parks attendance

15.1m
2011 North America top 20 water parks parks attendance

	PARK , location	change	2012	2011
1	TYPHOON LAGOON AT DISNEY WORLD Orlando, FL, U.S.A.	2.0%	2,100,000	2,058,000
2	BLIZZARD BEACH AT DISNEY WORLD Orlando, FL, U.S.A.	2.0%	1,929,000	1,891,000
3	AQUATICA Orlando, FL, U.S.A.	2.5%	1,538,000	1,500,000
4	WET 'N WILD Orlando, FL, U.S.A.	2.0%	1,247,000	1,223,000
5	SCHLITTERBAHN New Braunfels, TX, U.S.A.	3.6%	1,017,000	982,000
6	WATER COUNTRY USA Williamsburg, VA, U.S.A.	3.5%	748,000	723,000
7	NOAH'S ARK Wisconsin Dells, WI, U.S.A.	3.6%	666,000	643,000
8	ADVENTURE ISLAND Tampa, FL, U.S.A.	1.1%	651,000	644,000
9	SCHLITTERBAHN Galveston,TX, U.S.A.	2.1%	546,000	535,000
10	HYLAND HILLS WATER WORLD Denver, CO, U.S.A.	-3.8%	538,000	559,000
11	SIX FLAGS-HURRICANE HARBOR Arlington, TX, U.S.A.	1.6%	508,000	500,000
12	SIX FLAGS-WHITE WATER Marietta, GA, U.S.A.	1.0%	505,000	500,000
13	RAGING WATERS San Dimas, CA, U.S.A.	1.9%	480,000	471,000
14	SPLISH-SPASH Riverhead, NY, U.S.A.	7.2%	463,000	432,000
15	WET N' WILD Phoenix, AZ, U.S.A.	0.0%	461,000	461,000
16	SIX FLAGS HURRICANE HARBOR Jackson, NJ, U.S.A.	6.0%	424,000	400,000
17	WET N' WILD EMERALD POINT Greensboro, NC, U.S.A.	2.0%	406,000	398,000
18	SOAK CITY CEDAR POINT Sandusky, OH, U.S.A.	2.0%	403,000	395,000
19	ZOOMEZI BAY Powell, OH, U.S.A.	4.0%	389,000	374,000
20	CAMELBEACH Tannersville, PA, U.S.A.	0.5%	367,000	365,000

Figure 6B

ASIA-PACIFIC

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

Beth Chang
Regional Director, Economics

5.8%

Top 20 theme/amusement parks in Asia growth in attendance since 2011

14%

Universal Studios Japan growth in attendance since 2011

All eyes on the Mainland Chinese tourist

Combined attendance at the Top 20 Asian theme parks increased by 5.8% overall in 2012 to a record 108.7 million visits. This solid growth was led by the post-tsunami recovery of Tokyo Disneyland and Tokyo Disney Sea, as well as significant new attractions added to major parks. Big gainers for the year include Universal Studios Japan showing an impressive 14% jump in attendance with 9.7 million visits on the back of Universal Wonderland; Hong Kong Disneyland (13.6% increase) with the Grizzly Gulch themed zone opening, and Soncheng Park in Hangzhou (14.2% increase) which also opened a large new attraction zone.

109m

Asia theme/ amusement park attendance in 2012 compared to **131m** in the U.S.

Two China-based theme park chains, OCT Group and Haichang Group, have now entered the Top 10 global theme park chains with 23.4 and 9.4 million visits respectively and intentions of future expansion. The Top 15 Asian water parks advanced at a greater rate than theme parks, with 7.4% growth to 16 million, surpassing the Top 15 North American water parks. In the not-too-distant future, total theme park visits in China will also surpass those of North America; for 2012, those totals were respectively some 109 million and 132 million.

Within Asia there continues to be an increase of interest in building visitor attractions. AECOM can testify that there is a great deal of discussion going on regarding a wide variety of theme parks including indoor theme parks in an urban setting, indicating a trend toward very large, enclosed projects in many cities in China and Southeast Asia.

As a driver of global tourism, the mainland Chinese tourist is fast becoming the most sought-after visitor in the world, and will continue to be so for many years to come. This vast market sector is still at the very early stages of growth. Ten years from now all numbers will be significantly higher.

What fueled the increases in parks in South Korea and Hong Kong?

In Korea, Everland and Lotte World both enjoyed significant growth resulting from a combination of adding new attractions and an increase of inter-Asia tourism, primarily from Southeast Asia and mainland China.

Similarly, both Ocean Park Hong Kong and Hong Kong Disneyland had record years for attendance that can be credited to huge investments in significant new attractions, great marketing efforts by both parks and a substantial rise in tourism, mostly from the mainland, with a large increase in day trips. There were also dramatic increases in local visits from Hong Kong residents.

In the not-too-distant-future, total theme park visits in China will exceed those of the US.

As a driver of global tourism, the mainland Chinese tourist is fast becoming the most sought-after visitor in the world.

How do the Hong Kong numbers compare with visitation patterns at destination parks in North America?

The proportion of tourists to residents is about 70/30 at Hong Kong Disney and Ocean Park Hong Kong. Of those tourists, about 65-80% are mainland Chinese. Orlando has similar proportions, but in Southern California, more than half the visitors to Disney and Universal parks come from resident markets. Another difference is that a high percentage of tourists in Asia travel in groups, sharing transportation and other costs. The groups tend to visit theme parks.

How might those tourist-to-resident visitor proportions settle out in Asia, longterm?

We see tourists continuing to be a larger percent of visitation, even to the more regional parks. The market is still far from the saturation point, and in most parts of Asia, having a theme park in your local city is still relatively rare. Over the very long term that will change, but the tourism market will be crucial for a long time to come.

What's an important influence in Asian theme park development right now?

Disney is on track to open its Shanghai park in 2015, and that is generating a lot of interest among other developers and investors. It will have a major, positive impact — raising the bar for quality and guest experience, and setting a leading price point in the market.

70/30

Proportion of tourists to residents at Hong Kong Disney in 2012

70/30

Proportion of tourists to residents at Ocean Park Hong Kong in 2012

The expansion of theme park chains is an important trend in China with OCT Group leading the way. In 2012, OCT opened a new Happy Valley park and a water park in Wuhan, and a new destination theme park and water park will open in Tianjin this year. Notably, this group has also added a children's educational attraction, similar to a KidZania, at its new Shenzhen themed retail dining and entertainment district, OCT Bay.

3.5m

Universal Studios Singapore attendance in 2012

The integrated resort continues to be the model of development in Asia. Resorts World Sentosa (RWS) recently opened a major aquarium that generated a lot of positive interest and rounded out the tourist offerings there. The Universal Studios Singapore theme park within RWS seems to have stabilized at around 3.5 million visits. The mix of anchors creates some internal competition at an integrated resort, but overall visitation increases each time something is added. Just about all new projects of this kind coming up have a destination element, such as Ocean Kingdom in Zhuhai by the Chimelong Group, set to be open by the end of 2013, featuring an Ocean theme park and 1,888-room hotel.

What factors drove the mostly strong performance in Asian water parks for 2012?

Two newer parks in Beijing have drawn a lot of resident market interest and made it to the Top 15: Happy Magic Water Cube and Olympic Water Cube Indoor Water Park. Both opened in 2011, and 2012 was their first full year of operations. Olympic Water Cube extended its hours to 10 pm. In Guangzhou, China Chimelong Waterpark held onto the #1 spot on the list. In 2012, the park extended its season, opening in April, a month earlier than before, and with the addition of a warm water pool.

The integrated resort continues to be the model of development in Asia.

Ocean Park Hong Kong plans to open an indoor/outdoor water park in 2017.

Southeast Asia is a strong market for water parks and Sunway Lagoon in Kuala Lumpur showed a 15% increase. The park celebrated its 20th anniversary in 2012. The operator of Korea's two top water parks, Resom Spa Castle and Resom Ocean Castle, started online sales in 2012 and this helped keep attendance numbers up. In Mumbai, Water Kingdom saw a drop in attendance, and in Australia, Wet N Wild Gold Coast's numbers were flat as there were no new attractions at either park in 2012.

15%

Sunway Lagoon, Kuala Lumpur attendance growth since 2011.

What are some of the things driving and distinguishing the Asian water park market as it continues to dramatically expand?

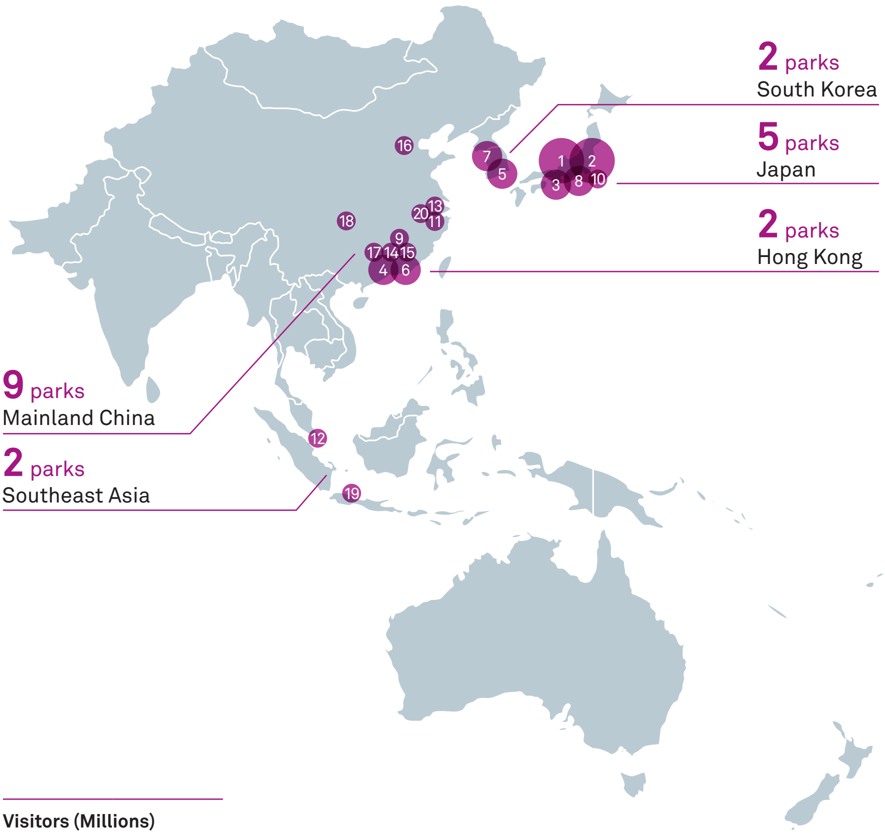
This continues to be a very promising market with a lot of room for growth. Ocean Park Hong Kong plans to open an indoor/outdoor water park in 2017; two new OCT water parks open this year, and another new water park has been announced for Shanghai.

Water parks require less initial investment than theme parks, attracting the interest of developers. The popular indoor/outdoor facilities extend the season and provide more control over the environment. Asians won't get into the water unless it is very warm.

The water park experience in the US is very family oriented, kid-oriented. But in Asia, the typical water park visitors are young adults, often on a group outing: it's a day out with work colleagues, fellow students, or friends. There's something of a crossover with the culture of spas and hot springs. The settings tend to be more tranquil with premium elements available — food service, massages, concerts, entertainment: things that extend the average length of stay and raise per caps.

Top 20 amusement/theme parks in Asia-Pacific

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



Visitors (Millions)

Up to 5m

5m–10m

10m–15m

15m+

Figure 7A

5.8%
2012–11 Asia-Pacific top 20 amusement / theme parks growth

108.7m
2012 Asia-Pacific top 20 amusement / theme parks attendance

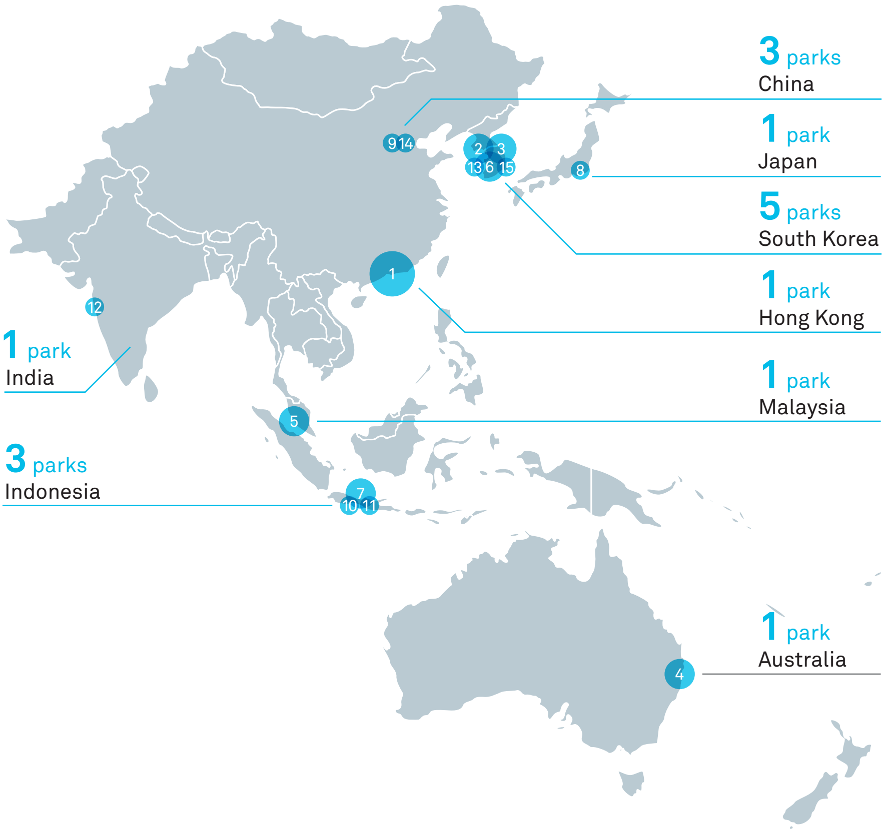
103.2m
2011Asia-Pacific top 20 amusement / theme parks attendance

	PARK, location	change	2012	2011
1	TOKYO DISNEYLAND Tokyo, Japan	**8.5%**	**14,847,000**	13,683,000
2	TOKYO DISNEY SEA Tokyo, Japan	**8.5%**	**12,656,000**	11,664,000
3	UNIVERSAL STUDIOS JAPAN Osaka, Japan	**14.1%**	**9,700,000**	8,500,000
4	OCEAN PARK Hong Kong SAR	**6.9%**	**7,436,000**	6,955,000
5	EVERLAND Gyeonggi-Do, South Korea	**4.3%**	**6,853,000**	6,570,000
6	HONG KONG DISNEYLAND Hong Kong SAR	**13.6%**	**6,700,000**	5,900,000
7	LOTTE WORLD Seoul, South Korea	**10.4%**	**6,383,000**	5,780,000
8	NAGASHIMA SPA LAND Kuwana, Japan	**0.5%**	**5,850,000**	5,820,000
9	OCT EAST Shenzhen, China	**7.9%**	**4,196,000**	3,890,000
10	YOKOHAMA HAKKEIJIMA SEA PARADISE Yokohama, Japan	**3.1%**	**4,050,000**	3,930,000
11	SONGCHENG PARK Hangzhou, China	**14.2%**	**3,800,000**	3,327,000
12	UNIVERSAL STUDIOS SINGAPORE Singapore	**2.0%**	**3,480,000**	3,411,000
13	CHANGZHOU DINOSAUR PARK Changzhou, China	**-2.9%**	**3,400,000**	3,500,000
14	HAPPY VALLEY Shenzhen, China	**-2.0%**	**3,212,000**	3,276,000
15	WINDOW OF THE WORLD Shenzhen, China	**1.5%**	**3,170,000**	3,123,000
16	HAPPY VALLEY Beijing, China	**-11.1%**	**3,055,000**	3,438,000
17	CHIMELONG PARADISE Guangzhou, China	**10.0%**	**2,970,000**	2,700,000
18	HAPPY VALLEY Chengdu, China	**0.1%**	**2,445,000**	2,443,000
19	DUNIA FANTASI Jakarta, Indonesia	**-9.8%**	**2,300,000**	2,550,000
20	FANTAWILD ADVENTURE Wuhu, China	**-2.0%**	**2,186,000**	2,230,000

Figure 7B

Top 15 water parks in Asia-Pacific

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



Visitors (Millions)

- Up to 1m
- 1m–2m
- 2m+

Figure 8A

7.4%
2012–11 Asia-Pacific top 15 water parks growth

16m
2012 Asia-Pacific top 15 water parks attendance

14.9m
2011 Asia-Pacific top 15 water parks attendance

	PARK, location	change	2012	2011
1	CHIMELONG WATERPARK Guangzhou, China	6.4%	2,021,000	1,900,000
2	OCEAN WORLD Gangwon-Do, South Korea	-0.3%	1,720,000	1,726,000
3	CARIBBEAN BAY Gyeonggi-Do, South Korea	0.7%	1,508,000	1,497,000
4	WET N WILD GOLD COAST Gold Coast, Australia	0.0%	1,200,000	1,200,000
5	SUNWAY LAGOON Kuala Lumpur, Malaysia	15.4%	1,200,000	1,040,000
6	RESOM SPA CASTLE Chungcheongnam-Do, South Korea	12.0%	1,158,000	1,034,000
7	ATLANTIS WATER ADVENTURE Jakarta, Indonesia	5.3%	1,000,000	950,000
8	SUMMERLAND Tokyo, Japan	13.1%	990,000	875,000
9	HAPPY MAGIC WATER CUBE Beijing, China	26.0%	968,000	768,000
10	THE JUNGLE WATER ADVENTURE Bogor, West Java, Indonesia	9.2%	951,000	871,000
11	OCEAN PARK WATER ADVENTURE Jakarta, Indonesia	25.0%	750,000	600,000
12	WATER KINGDOM Mumbai, India	-12.5%	700,000	800,000
13	RESOM OCEAN CASTLE Chungcheongnam-Do, South Korea	9.6%	638,000	582,000
14	OLYMPIC WATER CUBE INDOOR WATERPARK Beijing, China	21.0%	605,000	500,000
15	SEORAK WATERPIA Gangwon-Do, South Korea	7.3%	590,000	550,000

Figure 8B

EUROPE

Interview with
Natalia Bakhlina
Associate Director, Economics Europe

58m

Top 20 European theme / amusement parks attendance in 2012

Thrill coasters + family leisure = success

Overall attendance at theme parks in Europe has been relatively static for two consecutive years, hovering around 58 million visits to the top 20 parks. The industry has suffered from the enduring recession climate, worsened by cold and rainy weather in Northern European countries. The staycation trend helped the industry in 2011, but cold, wet summers in 2012 seem to have offset this trend and some theme parks and outdoor attractions struggled.

That said, the top parks all grew fairly consistently, but more slowly than the previous year. A number of parks show attendance declines for 2012, but there are several standouts that show what can be done even in the face of recession. The accomplishments of Parc Asterix, Puy du Fou and LEGOLAND Windsor in this difficult year should be instructive for the industry. And it's been a good year for new, extreme roller coasters, as well as children's attractions.

UK parks took a triple hit from continuing economic recession, bad weather and the London 2012 Olympic Games.

17%

Of UK population changed holiday plans in 2012 due to poor weather

What were the main factors behind the 2012 attendance decline at theme parks in the United Kingdom?

It has been an extraordinarily tough year, let's face it. UK parks took a triple hit from continuing economic recession, cold and wet weather and the London 2012 Olympic Games. It's instructive to see how much harm poor weather can do to the theme park industry. 2012 had record cold, and the chilly temperatures were accompanied by nonstop, pouring rain in June and July. In fact, 2012 was the wettest year for 100 years, and according to VisitEngland staycation survey 17% of respondents changed their holiday plans in 2012 due to weather, either going abroad or shortening/cancelling the trip. It may have longer-term implications for the UK parks with 16 percent saying that poor weather in 2012 has put them off taking trips in England in 2013.

The Olympics took an especially heavy toll on local tourism in general, due to the city being deserted for several weeks in summer, traditionally the busiest period for UK parks. Despite that, LEGOLAND Windsor had quite a successful year, due to its new strategy of evolving the property into a family destination through the addition of a hotel.

How did the Olympics harm UK tourism?

Everybody went away to avoid the crowds. The Mayor of London made an announcement warning everyone about the Olympics influx and Transport for London carried out a massive campaign to avoid chaos. It worked too well: Central London was virtually empty. The tourists who came over for the Games were concentrated in the Olympic venue areas. Those locals who did stay behind had a great time...

This is a pattern seen with mega-events such as international sports events and world expos. There's anticipation that it will bring huge crowds and increase visitor flow throughout the metropolitan area. In reality it doesn't always happen that way – the impact of the tourism is often less than expected. London 2012 counts as a huge success in many ways, and aspects of the industry will have benefited – hotels, transportation and sports, for instance. But the impact is not overall.

What contributed to the 2012 attendance declines at theme parks in Northern Europe and Italy?

In Northern Europe, cold and wet weather is the primary culprit. Italy has suffered greatly from economic troubles and a new kind of property tax, the INU, has cut into discretionary spending. Homeowners were all obliged to pay a sum of money on a particular day of the year – it applied to both primary and second homes. This is symptomatic in many European countries – austerity measures imposed as a result of the recession have a discouraging effect on leisure spending.

33%

Overall growth in attendance at Merlin's legoland parks

The charts also show declines at European theme parks owned by Merlin Entertainments Group, as that company prepares for an IPO.

The group was unfortunate with the majority of its parks located in UK and Italy - the markets most hit in 2012. However, theme parks are only part of the picture for Merlin. While resort theme park operations for the group suffered in 2012 with an overall decline of 11%, Merlin's LEGOLAND Parks and "midway attractions" have done very well, growing by 33% and 23%, respectively. "Midway attractions" include the Sea Life aquariums, Dungeons, and the Tussauds group sites – everything but theme parks and LEGO parks. Several new Merlin attractions in Asia have been very successful, including LEGOLAND Malaysia, opened in 2012. And the LEGO parks continue to grow as Merlin adds accommodations to develop them into family destination resorts.

54m

Merlin Entertainment total visitors across all properties in 2012

27m

Parques Reunidos total visitors across all properties in 2012

Austerity measures imposed as a result of the recession have a discouraging effect on leisure spending.

Park Asterix and Puy du Fou all show significant growth for 2012. How did these parks succeed in the face of the continuing recession?

Considerable reinvestment and awards.

8%

Parc Asterix increase in park attendance in 2012

Parc Asterix, a top performer in 2012, increased the area of the park by about 10%, or just under 3 hectares which grew attendance by 8%. Improvements include a new Egypt themed land for children and several highly anticipated rides including the 40-meter-high OzIris inverted coaster that dips underwater in the course of its several loops. For children, there's the new SOS Numérobis ride in the park's new land.

90,000

People attracted by Puy Du Fou Christmas show Grand Noël in 2012

Celebrating 35th anniversary of its original show Cinescenie, Puy du Fou operators believe a key driver of the 2012 visitation spike was the global recognition the park received as a result of being named for TEA's Thea Classic award in 2012. The honor drew international press attention, and the park made the most of it in their marketing. Puy du Fou president has said to me that the Thea Classic Award helped establish their park as the place to spend family time for the domestic market, thus growing visitation from the French. They also feel that people value the authenticity of the live shows that differentiate Puy du Fou from other parks. The park's new Christmas show Grand Noel is reported to have been a success attracting 90,000 spectators.

In current economic conditions, even a modest growth is an achievement for a theme park, and timely reinvestment is key in this. PortAventura is very much in the press now having just opened its renovated Costa Caribe Aquatic Park, and in 2012 drew crowds to its new roller coaster, "Shambhala: expedition to the Himalaya," which has broken roller coaster records in Europe for height (76 meters), drop

Spanish parks in general are not thriving, but PortAventura has shown what can be done even in the midst of a recesssion, especially if you have good weather.

There's a lot of interest in thrill coasters in Europe.

(78 meters) and speed (134 km/h on the first descent). The trade magazine Kirmes & Parks honored Shambhala with its award for "Best European Attraction 2012." The new children's area SésamoAventura, opened in 2011 keeps thriving. As a result, the improvements made under the auspices of InvestIndustrial, which took full control of the park in 2012 by purchasing the remaining 50% of the stake, led to growth amidst the general decline of the Spanish theme park industry.

76 meters
78 meters
134 km/h

Height, drop and speed respectively for PortAventura's "Shambhala: Expedition to the Himalaya." A triple record in Europe.

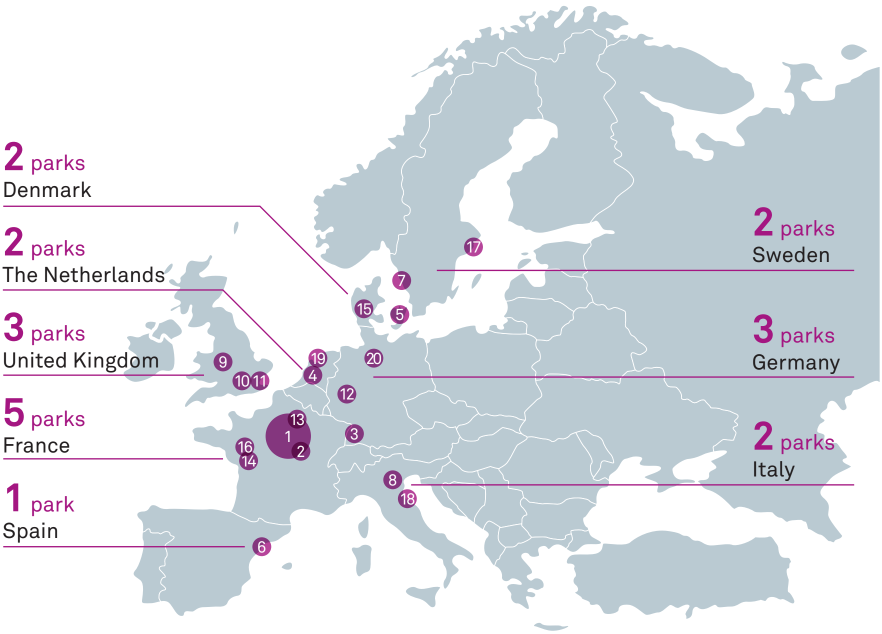
So there are indications here of how European parks can counter the negative trends of poor weather and recession.

Certainly cold weather is less of an issue at Christmas time. The same goes for Halloween. More parks might look at what they can do with certain kinds of investments, and making the most of holidays, to offset bad summer numbers and even overcome negative trends. Europe, especially Northern Europe, hasn't seen a good summer in a long time. With the uncertainty of the weather over the past few years, it might be time to explore more options.

There's a lot of interest in thrill coasters in Europe. At the same time, catering to families with young children is more important than ever. PortAventura has set its strategy on becoming the best family destination in Europe, Parc Asterix has balanced its new thrill coaster with a child ride, and Puy du Fou allows the whole family to enjoy its shows at the same time without worrying about age and height restrictions. LEGO Parks have joined the trend by starting to evolve into family resort destinations through delivering hotels and holiday villages.

Top 20 amusement/theme parks in Europe

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



Visitors (Millions)

- Up to 5m
- 5m–10m
- 10m–15m
- 15m+

Figure 9A

-0.3%
2012–11 Europe top 20 amusement/ theme parks growth

58m
2012 Europe top 20 amusement/theme parks attendance

58.2m
2011 Europe top 20 amusement/theme parks attendance

	PARK, location	change	2012	2011
1	DISNEYLAND PARK AT DISNEYLAND PARIS Marne-La-Vallée, France	1.9%	11,200,000	10,990,000
2	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS Marne-La-Vallée, France	1.9%	4,800,000	4,710,000
3	EUROPA PARK Rust, Germany	2.2%	4,600,000	4,500,000
4	DE EFTELING Kaatsheuvel, Netherlands	1.8%	4,200,000	4,125,000
5	TIVOLI GARDENS Copenhagen, Denmark	1.8%	4,033,000	3,963,000
6	PORT AVENTURA Salou, Spain	0.5%	3,540,000	3,522,000
7	LISEBERG Gothenburg, Sweden	-3.4%	2,800,000	2,900,000
8	GARDALAND Castelnuovo del Garda, Italy	-10.0%	2,700,000	3,000,000
9	ALTON TOWERS Staffordshire, U.K.	-9.4%	2,400,000	2,650,000
10	LEGOLAND WINDSOR Windsor, U.K.	5.3%	2,000,000	1,900,000
11	THORPE PARK Chertsey, U.K.	-10.0%	1,800,000	2,000,000
12	PHANTASIALAND Brühl, Germany	0.0%	1,750,000	1,750,000
13	PARC ASTERIX Plailly, France	8.0%	1,723,000	1,595,000
14	FUTUROSCOPE Jaunay-Clan, France	-2.4%	1,700,000	1,741,000
15	LEGOLAND BILLUND Billund, Denmark	3.1%	1,650,000	1,600,000
16	PUY DU FOU Les Epesses, France	6.7%	1,600,000	1,500,000
17	GRONALUND Stockholm, Sweden	-3.8%	1,408,200	1,464,000
18	MIRABILANDIA Savio, Italy	-6.1%	1,390,000	1,481,000
19	DUINRELL/ATTRAKTIEPARK Wassenaar, The Netherlands	-0.1%	1,360,000	1,362,000
20	HEIDE PARK Soltau, Germany	-7.1%	1,300,000	1,400,000

Figure 9B - 2011 numbers have changed since previous issue of the report due to new information released by Merlin Entertainments Group

2012 MUSEUM INDEX

MUSEUMS

Interview with
Linda Cheu
Vice President

Drivers of economic and cultural transformation

With this publication, AECOM has begun to track visitation at the world's most-visited museums in three primary markets: Europe, North America and Asia. We have performed due diligence to verify all figures reported here for 2012. Some markets, such as the UK and Europe, have close government monitoring of museums. Others are less regulated. Excluded from this report were historic buildings, ancient remains and religious buildings. To be eligible for consideration in this report, a facility had to have a substantial collection that would be key to its visitation.

TEA and AECOM welcome feedback of all kinds from the museum community regarding this report and how we might address museums in future reports.

What are some of the big lessons to learn from the 2012 museum numbers and the three markets studied?

European museums are, not surprisingly, dominated by art: some of the best art collections in the world are in major, international destination cities, such as London, Paris, Madrid and St Petersburg. In Europe, a lot of museums are free, and that helps feed attendance. It's government policy that state-sponsored museums in the UK are free, and they dominate the Euro list. Blockbuster exhibits can add a lot to a museum's attendance totals. The Victoria & Albert Museum in London recorded its highest attendance ever in 2012 and this was due to its special design exhibitions, including British design, Hollywood costume and British ballgowns. Reinvestment is what creates attendance spikes: new wings, new exhibits. In Europe, the Louvre opened a new wing of Islamic art. At the National Museum of Scotland, a 47 million pound refurbishment helped triple the previous attendance.

In the Middle East and Asia, the role of museums in driving tourism has caused a sea change in how they are perceived from an economic impact perspective. A world-class city must have world-class museums, and therefore museums are building blocks for cities such as Singapore, Macau, Beijing and Jakarta as they work to become top international destinations. China plans to establish 1,000 new museums in the next 10 years, and by 2020 total museum attendance in China is projected to be 1 billion. The Chinese government recently instituted laws mandating free admission to museums in that country. Museums are slowly shifting from displays of antiquities to places with more visitor-oriented, interactive exhibits that make use of technology.

In North America, the most-represented category of the top 20 museums is science and natural history, followed by large, encyclopedic art museums. While average science

100 museums

China plans to establish 100 museums in the next 10 years.

1 billion

Expected total museum attendance in China by 2020.

71m

Total attendance for museums in Europe — compared to **58m** for theme parks.

centers attract primarily resident visitors, the largest science and natural history museums in North America shown on this list attract a mix of tourists and local residents. The leading art institutions, with their unique collections, are always a strong tourist draw. Some of the largest museums in North America are free and part of the Smithsonian Institution. Many of the New York museums on this list attract major international visitation, including the American Museum of Natural History, the Met and MOMA. Reinvestment and new exhibits continue to be important; the space shuttle Endeavor has helped boost attendance at the California Science Center to about 2 million this past year.

Do the top 20 lists of museums reflect the dynamics of most museums in their respective markets?

Our Top 20 list studies the biggest institutions in the big cities — but the majority of museums have fewer than 1 million attendees per year. The Institute of Museum and Library Services recently estimated that there are over 17,500 museums in the United States alone, so our list represents a very small percentage of the total market. This dynamic applies to most of the geographies that we have covered. There are many small and medium-sized museums and they're found in every city and town. The characteristics of the smaller and mid-sized museums may well differ from the top-destination facilities.

It was pointed out in a recent survey by the American Alliance of Museums (AAM), that museums in North America on the whole enjoyed attendance increases in 2012 while still struggling with the effects of the recession. How can they retain those higher attendance numbers in coming years?

Reinvestment is a key factor in fostering attendance at museums just as it is for commercial attractions, and so museums must call on their nonprofit funding sources to reinvest. There is plenty of motivation to do so when one takes into account their value to the local community as an educational force, local economic engine and development catalyst. Everyone stands to benefit from a fuller understanding of just how much museums contribute.

Museums are powerful generators of cultural capital. Cities and local communities and their elected officials look to museums and other cultural anchors as a way of revitalizing neighborhoods, and recent studies confirm their social and economic impact. They spend locally, and they help make cities more attractive for broader economic efforts.

Tell us more about the positive economic impact of museums and your research findings.

There is a strong and documented connection between the success of art and culture, and regional economic success. We found that museums are drivers of economic growth and community revitalization in a way that goes far beyond traditional economic impact analysis. Museums support creative industries, and also play an important role in helping cities attract a well-educated work force – the "creative class," and the kinds of businesses that employ them. We are increasingly being asked by our clients to help measure economic impact and the museum's role in revitalization of their neighborhood and supporting their city's economy.

Many recent publications and research support the link between museums and the economy. In the Warhol Economy, Elizabeth Currid identifies the culture and arts industry, the fourth largest employer in New York City, as New York City's true competitive advantage, with a more important role than the finance industry in supporting the local economy.

The recently published World Culture Report 2012 states: "Cultural prowess and economic success are increasingly seen as interlinked. Those cities with historically strong cultural offers, such as London, New York and Paris, see culture as a vital part of their economic strength. This is expressed in two ways. Firstly, the commercial forms of culture — the creative industries – make up a large and growing share of the economies of large cities. Given the challenges facing some other sectors of the economy… the creative industries represent a large source of employment, exports and tax revenue that needs to be better understood by policymakers in both the cultural and economic fields. The second contribution of culture to urban economies is, if anything, more fundamental. Culture in all its diverse forms is central to what makes a city appealing to educated people and hence to the businesses which seek to employ them. In the globalized knowledge economy, having a well-educated workforce is the key to success … A rich and vibrant culture thus also becomes an indirect source of economic success."

Top 20 Global Museums

	MUSEUM, Location	2012 visitors	Admission
1	LOUVRE Paris, France	**9,720,000**	Paid
2	NATIONAL MUSEUM OF NATURAL HISTORY Washington, DC, U.S.A.	**7,600,000**	Free
3	NATIONAL AIR AND SPACE MUSEUM Washington, DC, U.S.A.	**6,800,000**	Free
4	THE METROPOLITAN MUSEUM OF ART New York, NY, U.S.A.	**6,116,000**	Paid
5	BRITISH MUSEUM London, U.K.	**5,576,000**	Free
6	TATE MODERN London, U.K.	**5,319,000**	Free
7	NATIONAL GALLERY London, U.K.	**5,164,000**	Free
8	VATICAN MUSEUMS Vatican	**5,065,000**	Paid
9	AMERICAN MUSEUM OF NATURAL HISTORY New York, NY, U.S.A.	**5,000,000**	Paid
10	NATURAL HISTORY MUSEUM London, U.K.	**4,936,000**	Free
11	NATIONAL MUSEUM OF AMERICAN HISTORY, Washington, DC, U.S.A.	**4,800,000**	Free
12	NATIONAL PALACE MUSEUM (TAIWAN) Taipei, Taiwan	**4,361,000**	Paid
13	NATIONAL GALLERY OF ART Washington DC, U.S.A.	**4,200,000**	Free
14	NATIONAL MUSEUM OF CHINA Beijing, China	**4,100,000**	Free
15	CENTRE POMPIDOU Paris, France	**3,800,000**	Paid
16	MUSEE D'ORSAY Paris, France	**3,579,000**	Paid
17	VICTORIA & ALBERT MUSEUM London, U.K.	**3,232,000**	Free
18	NATIONAL MUSEUM OF KOREA Seoul, South Korea	**3,128,000**	Free
19	GEOLOGICAL MUSEUM OF CHINA Beijing, China	**3,000,000**	Paid
20	SCIENCE MUSEUM (SOUTH KENSINGTON) London, U.K.	**2,990,000**	Free

Figure10 A

Top 20 Museums Worldwide

Where are the top 20 museums worldwide?

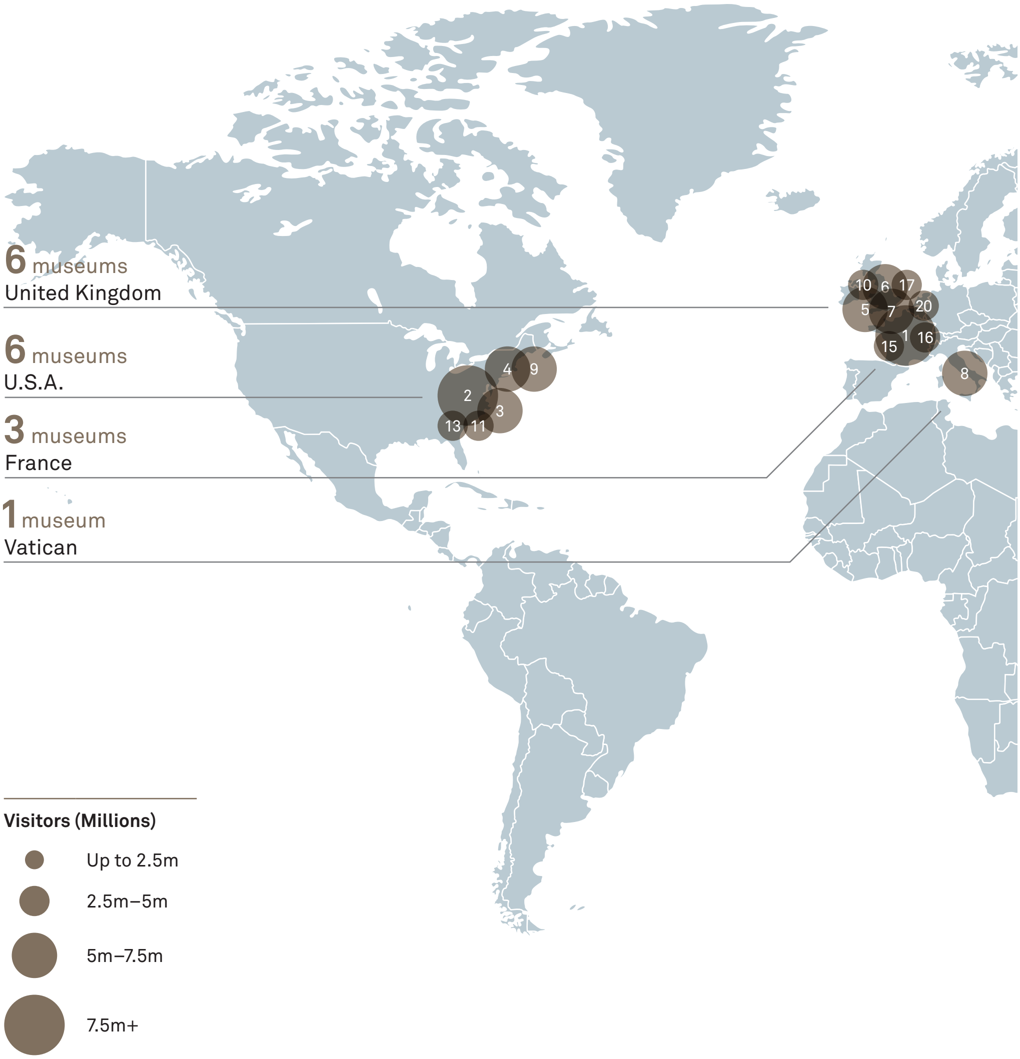
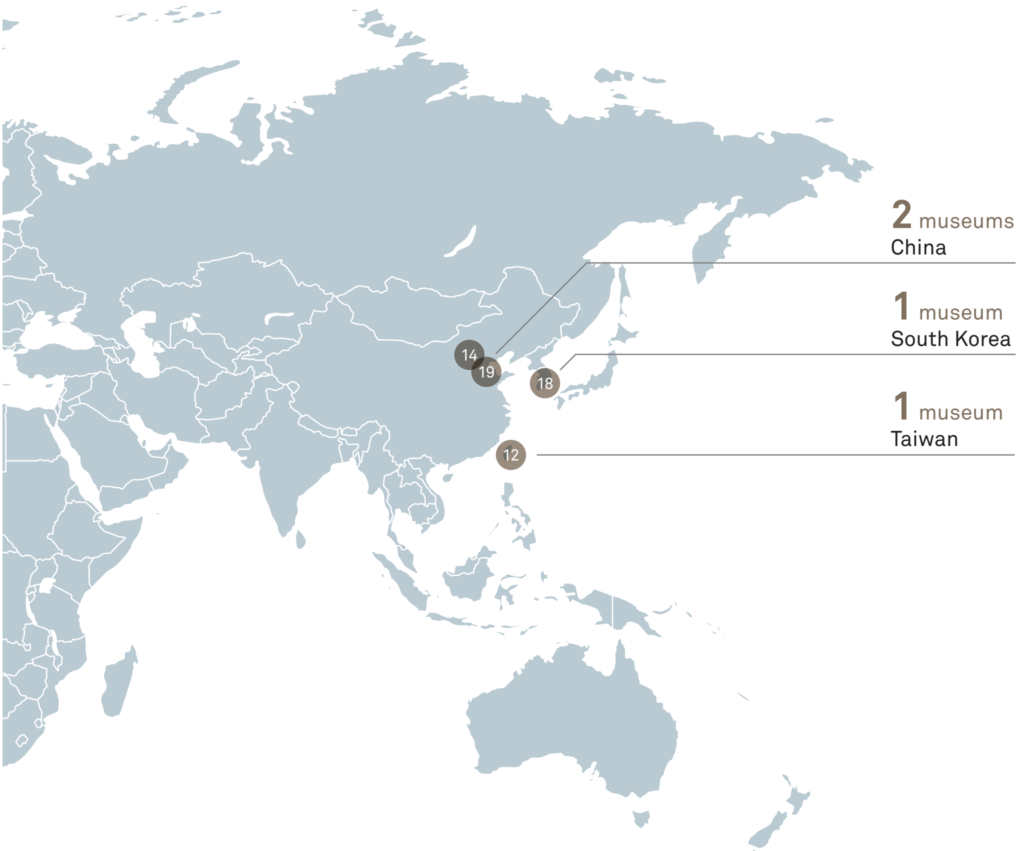


Figure 10B

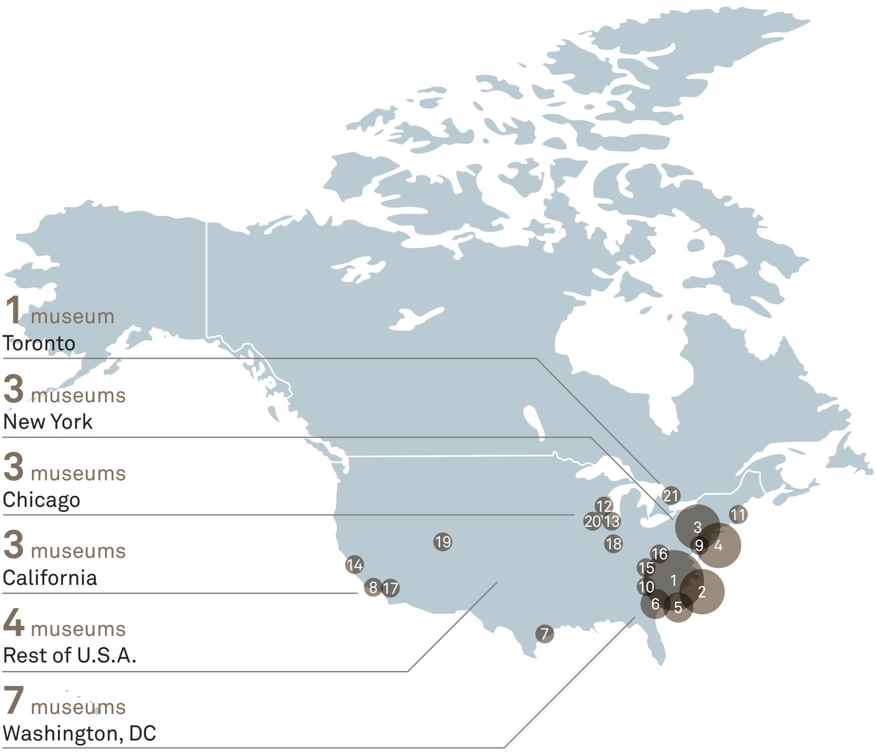


98.5m

2012 top 20 museums worldwide attendance

Top 20 Museums in North America

Where are the top 20 museums in North America?



Visitors (Millions)

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

Figure 11A

57m

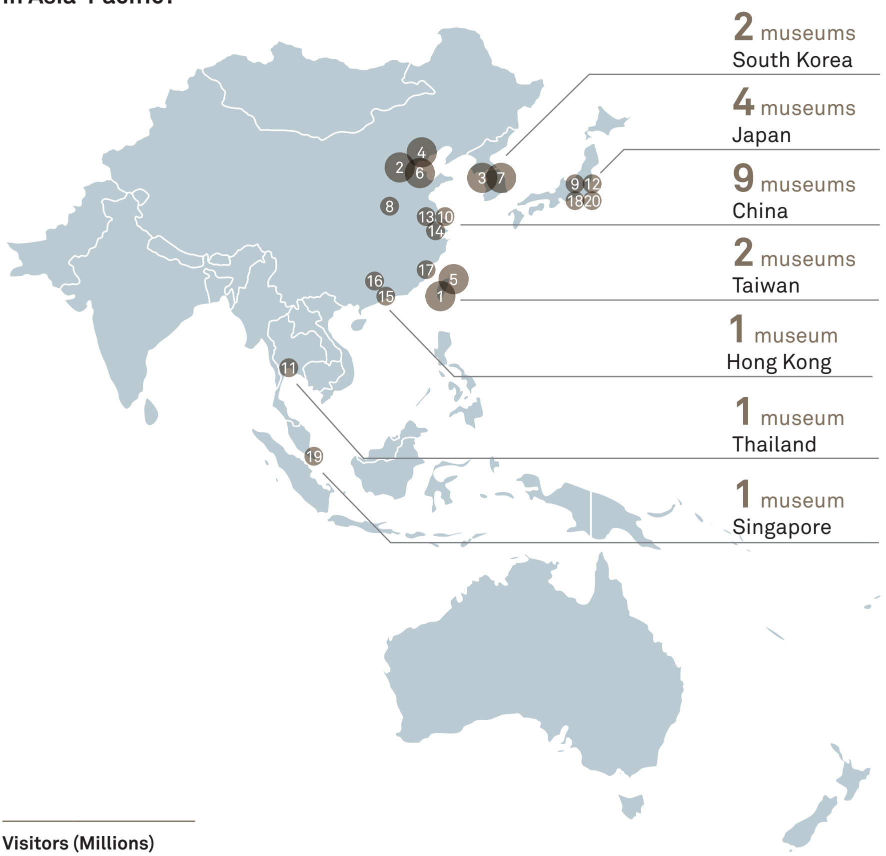
2012 North America top 20 museums attendance

	MUSEUM, Location	2012 visitors	Admission
1	NATIONAL MUSEUM OF NATURAL HISTORY Washington, DC, U.S.A.	**7,600,000**	Free
2	NATIONAL AIR AND SPACE MUSEUM Washington, DC, U.S.A.	**6,800,000**	Free
3	THE METROPOLITIAN MUSEUM OF ART New York, NY, U.S.A.	**6,116,000**	Paid
4	AMERICAN MUSEUM OF NATURAL HISTORY New York, NY, U.S.A.	**5,000,000**	Paid
5	NATIONAL MUSEUM OF AMERICAN HISTORY Washington, DC, U.S.A.	**4,800,000**	Free
6	NATIONAL GALLERY OF ART Washington DC, U.S.A.	**4,200,000**	Free
7	HOUSTON MUSEUM OF NATURAL SCIENCE Houston, TX, U.S.A.	**2,219,000**	Paid
8	CALIFORNIA SCIENCE CENTER Los Angeles, CA, U.S.A.	**2,000,000**	Free
9	THE MUSEUM OF MODERN ART New York, NY, U.S.A.	**1,800,000**	Paid
10	NATIONAL MUSEUM OF THE AMERICAN INDIAN Washington, DC, U.S.A.	**1,600,000**	Free
11	MUSEUM OF SCIENCE Boston MA, U.S.A.	**1,500,000**	Paid
12	MUSEUM OF SCIENCE AND INDUSTRY Chicago, IL, U.S.A.	**1,500,000**	Paid
13	THE ART INSTITUTE OF CHICAGO Chicago, IL, U.S.A.	**1,461,000**	Paid
14	CALIFORNIA ACADEMY OF SCIENCES San Francisco, CA, U.S.A.	**1,400,000**	Paid
15	UDVAR-HAZY CENTER, Washington, DC, U.S.A.	**1,400,000**	Free
16	U.S. HOLOCAUST MEMORIAL MUSUEM Washington, DC, U.S.A.	**1,400,000**	Paid
17	THE J. PAUL GETTY MUSEUM Los Angeles, CA, U.S.A.	**1,300,000**	Free
18	THE CHILDREN'S MUSEUM OF INDIANAPOLIS Indianapolis, IN, U.S.A.	**1,270,000**	Paid
19	DENVER MUSEUM OF NATURE & SCIENCE Denver, CO, U.S.A.	**1,250,000**	Paid
20	FIELD MUSEUM OF NATURAL HISTORY Chicago, IL, U.S.A.	**1,200,000**	Paid
21	ONTARIO SCIENCE CENTER Toronto, ON, Canada	**1,200,000**	Paid

Figure 11B

Top 20 Museums in Asia-Pacific

Where are the top 20 museums in Asia-Pacific?



Visitors (Millions)

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

Figure 12A

41.6m

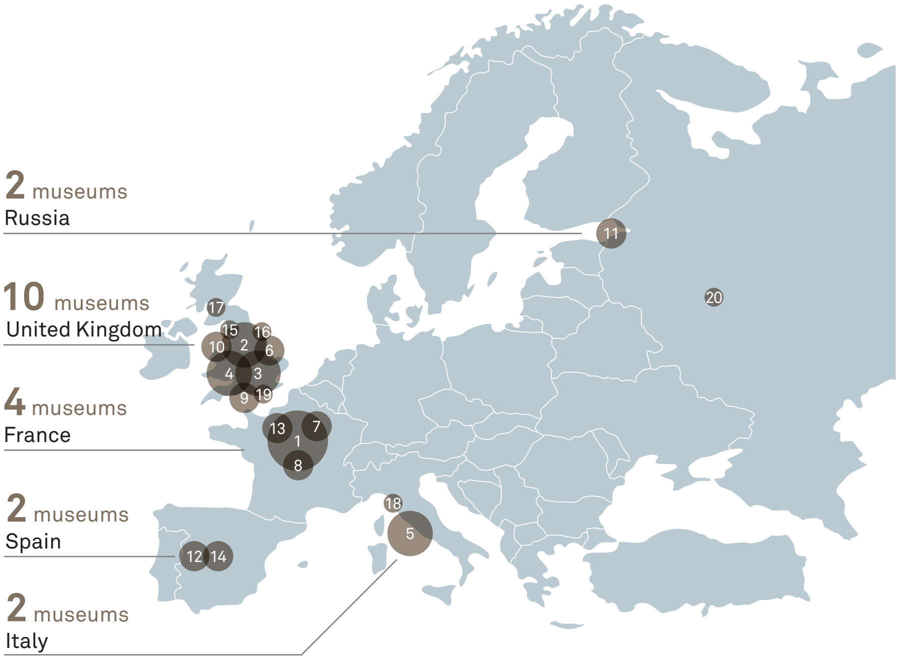
2012 Asia-Pacific top 20 museums attendance

	MUSEUM, Location	2012 visitors	Admission
1	NATIONAL PALACE MUSEUM (TAIWAN) Taipei, Taiwan	4,361,000	Paid
2	NATIONAL MUSEUM OF CHINA Beijing, China	4,100,000	Free
3	NATIONAL MUSEUM OF KOREA Seoul, South Korea	3,128,000	Free
4	GEOLOGICAL MUSEUM OF CHINA Beijing, China	3,000,000	Paid
5	NATIONAL MUSEUM OF NATURAL SCIENCE Taichung, Taiwan	2,954,000	Paid
6	CHINA SCIENCE TECHNOLOGY MUSEUM Beijing, China	2,820,000	Paid
7	NATIONAL FOLK MUSEUM OF KOREA Seoul, South Korea	2,640,000	Free
8	HENAN MUSEUM Zhengzhou, China	2,050,000	Free
9	NATIONAL MUSEUM OF NATURE AND SCIENCE Tokyo, Japan	2,014,000	Paid
10	SHANGHAI MUSEUM Shanghai, China	1,940,000	Paid
11	NATIONAL SCIENCE MUSEUM Bangkok, Thailand	1,655,000	Paid
12	TOKYO NATIONAL MUSEUM Tokyo, Japan	1,471,000	Paid
13	SUZHOU MUSEUM Suzhou, China	1,440,000	Free
14	ZHEJIANG MUSEUM Hangzhou, China	1,290,000	Free
15	HONG KONG SCIENCE MUSEUM Hong Kong SAR	1,288,000	Paid
16	GUANGDONG PROVINCE MUSEUM Guangzhou, China	1,250,000	Free
17	FUJIAN MUSEUM Fuzhou, China	1,080,000	Free
18	MORI ART MUSEUM Tokyo, Japan	1,066,000	Paid
19	SCIENCE CENTER SINGAPORE Singapore	1,054,000	Paid
20	THE NATIONAL MUSEUM OF WESTERN ART Tokyo, Japan	967,000	Free

Figure 12B

Top 20 Museums in Europe

Where are the top 20 museums in Europe?



Visitors (Millions)

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

Figure 13A

71.5m

2012 Europe top 20 museums attendance

	MUSEUM, Location	2012 visitors	Admission
1	LOUVRE Paris, France	9,720,000	Paid
2	BRITISH MUSEUM London, U.K.	5,576,000	Free
3	TATE MODERN London, U.K.	5,319,000	Free
4	NATIONAL GALLERY London, U.K.	5,164,000	Free
5	VATICAN MUSEUMS Vatican, Vatican	5,065,000	Paid
6	NATURAL HISTORY MUSEUM London, U.K.	4,936,000	Free
7	CENTRE POMPIDOU Paris, France	3,800,000	Paid
8	MUSEE D'ORSAY Paris, France	3,579,000	Paid
9	VICTORIA & ALBERT MUSEUM London, U.K.	3,232,000	Free
10	SCIENCE MUSEUM (SOUTH KENSINGTON) London, U.K.	2,990,000	Free
11	STATE HERMITAGE St Petersburg, Russia	2,882,000	Paid
12	MUSEO NACIONAL DEL PRADO Madrid, Spain	2,830,000	Paid
13	CITE DES SCIENCES ET DE L'INDUSTRIE Paris, France	2,641,000	Paid
14	REINA SOFIA Madrid, Spain	2,572,000	Paid
15	TOWER OF LONDON London, U.K.	2,444,000	Paid
16	NATIONAL PORTRAIT GALLERY London, U.K.	2,097,000	Free
17	NATIONAL MUSEUM OF SCOTLAND Edinburgh, U.K.	1,894,000	Free
18	GALLERIA DEGLI UFFIZI Florence, Italy	1,769,000	Paid
19	TATE BRITAIN London, U.K.	1,534,000	Free
20	TRETYAKOV GALLERY Moscow, Russia	1,492,000	Paid

Figure 13B

Methodology and evolution of the TEA/AECOM Theme Index and Museum Index

Should your property be included?

This is the sixth 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 waterpark figures and address the international scope of the industry.

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 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. There is also a table of the top waterparks in the world and in the United States, and of the top global chain operators.

To be included in the study, a facility in general must be gated (entry ticket required). North American parks must have annual visits above one million. 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 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 140 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.

About TEA
The TEA (Themed Entertainment Association) is an international nonprofit alliance founded in 1991 and based in Burbank, Calif. TEA represents some 7,000 creative specialists, from architects to designers, technical specialists to master planners, scenic fabricators to artists, and builders to feasibility analysts working in more than 680 firms in 39 different countries. TEA presents the annual Thea Awards and the TEA Summit and hosts the annual SATE conferences (Story, Architecture, Technology, Experience). TEA also produces a variety of print and electronic publications, including the TEA/AECOM Annual Theme Index, TEA Project Development Guidelines, and TEA Annual & Directory.

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