

**2015  
THEME  
INDEX**

**m** 2015  
MUSEUM  
INDEX

**Global  
Attractions  
Attendance  
Report**



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**COVER:** © Disneyland at Disneyland Resort®,  
Anaheim, CA, U.S.

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The definitive annual attendance study for the themed entertainment and museum industries.

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**Global  
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Report**



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# THE BIG PICTURE



**5.4%**

Top 25 amusement/theme parks attendance growth worldwide 2014–15

**235.6m**

Top 25 amusement/theme parks worldwide attendance 2015

**7.2%**

Top 10 theme park groups worldwide attendance growth 2014–15



**John Robinett**  
Senior Vice President,  
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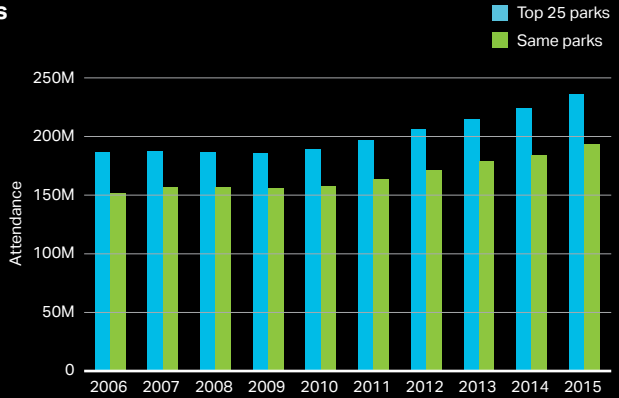
It is the 10 year anniversary of the TEA/ AECOM Theme Index, and what a year it has been. The top attraction operators saw growth of over 7%, with the Top 25 theme parks achieving over 5% growth — tremendous numbers for a relatively mature industry. Over our 10 years of tracking the industry we have seen steady improvements in business volume, despite a global recession, introduction of exciting new technologies, and continued internationalization of the attractions world.

This year, global theme park attendance was driven largely by strong performance of the major Asian and U.S. operators, including Chimelong, SongCheng, Disney and Universal. Water parks saw healthy attendance improvements of almost 4% with most markets doing well. Finally, museums, while having a few standouts with double digit growth such as the Hermitage in Russia, and the Shanghai Science and Technology Museum, held steady overall.

So what specific changes have occurred in the business over the last 10 years? Three areas stand out — Industry volume, distribution, and ownership.

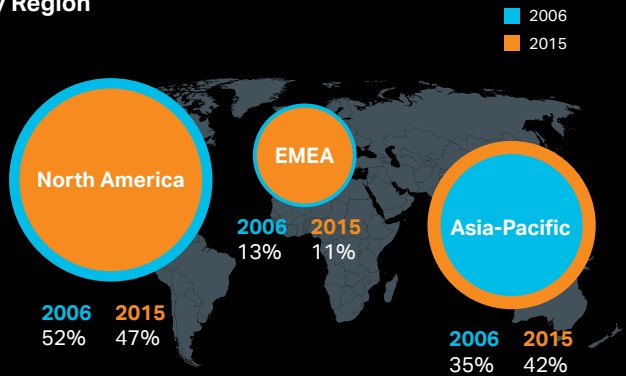
## Same Parks versus Top 25 Parks

As you can see opposite, industry volume as measured by theme park attendance has grown steadily, both organically and through new park additions. Attendance at the top 25 parks grew from 187 M in 2006 to 236 M in 2015, with a 2.6% annual growth rate. At the 18 parks that were in the list continuously over this period, attendance grew from 151 M in 2006, to 192 M in 2015, equal to a 2.7% growth rate.



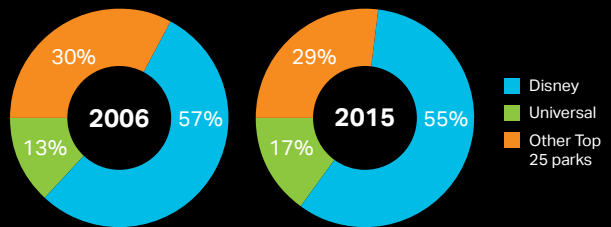
## Shares of Global Attendance by Region

The geographic distribution of attractions has moved east across the globe with Asia-Pacific now capturing 42% of the world's major attractions, up from 35% 10 years ago.



## Major Parks' Share of Global Attendance

And with regard to ownership, while the industry has certainly welcomed a number of high quality new operators, market share has actually consolidated under the two majors, Disney and Universal.



**It has been a good decade overall, and we look forward to what the next one will bring.**



# TOP 10 THEME PARK GROUPS WORLDWIDE



RANK	GROUP	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	WALT DISNEY ATTRACTIONS	2.7%	137,902,000	134,330,000
2	MERLIN ENTERTAINMENTS GROUP	0.2%	62,900,000	62,800,000
3	UNIVERSAL PARKS AND RESORTS	11.8%	44,884,000	40,152,000
4	OCT PARKS CHINA	7.8%	30,180,000	27,990,000
5	SIX FLAGS INC.	11.4%	28,557,000	25,638,000
6	CEDAR FAIR ENTERTAINMENT COMPANY	4.9%	24,448,000	23,305,000
7	CHIMELONG GROUP	26.4%	23,587,000	18,659,000
8	FANTAWILD (NEW)	77.4%	23,093,000	13,020,000
9	SEAWORLD PARKS & ENTERTAINMENT	0.3%	22,471,000	22,399,000
10	SONGCHENG WORLDWIDE	53.4%	22,338,000	14,560,000
<b>TOP 10 TOTAL ATTENDANCE 2015</b>			<b>420,360,000</b>	<b>382,853,000</b>
TOP 10 TOTAL ATTENDANCE 2014		<b>7.2%</b>	<b>392,039,000</b>	

## 7.2%

Top 10 theme park groups worldwide attendance growth 2014–15

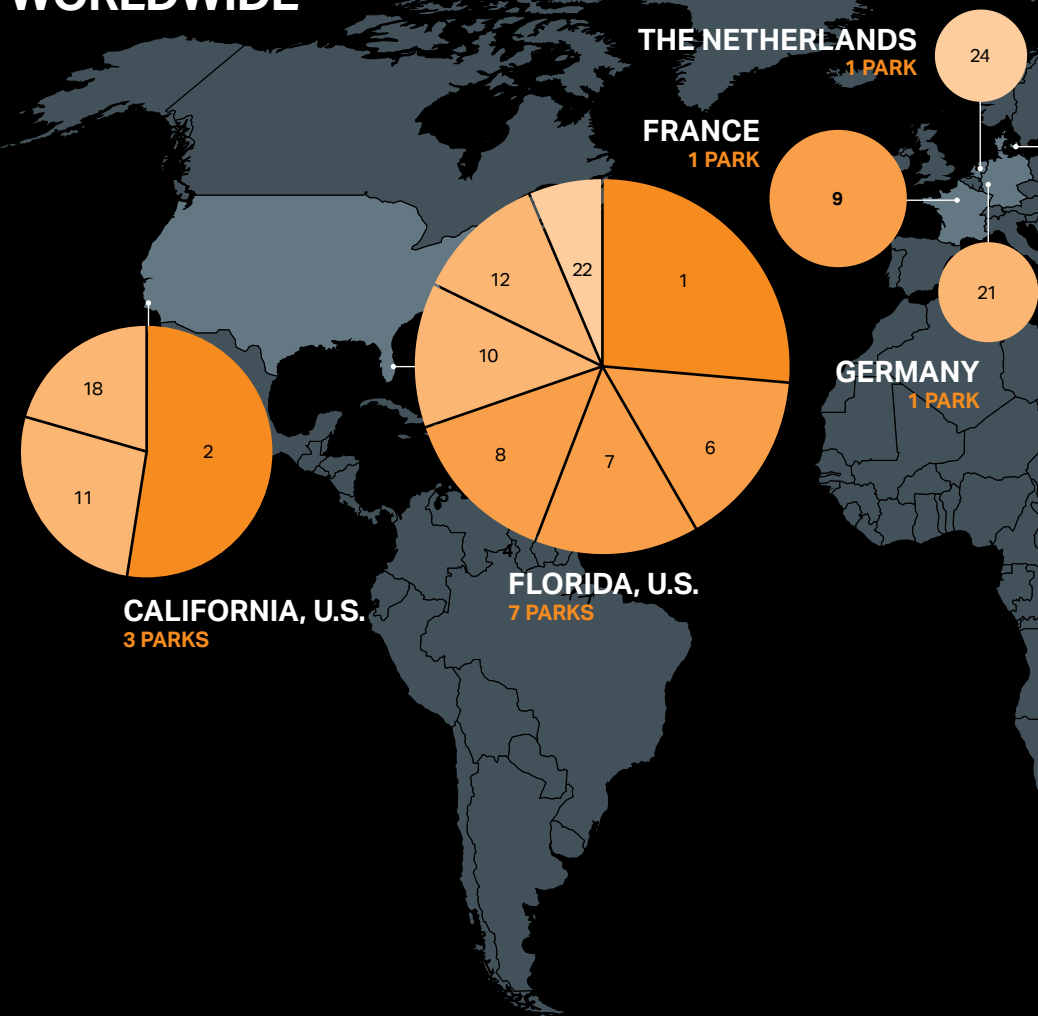
## 420.4m

Top 10 theme park groups worldwide attendance 2015

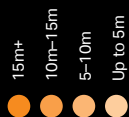
## 392.0m

Top 10 theme park groups worldwide attendance 2014

# TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE

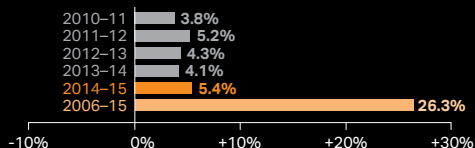


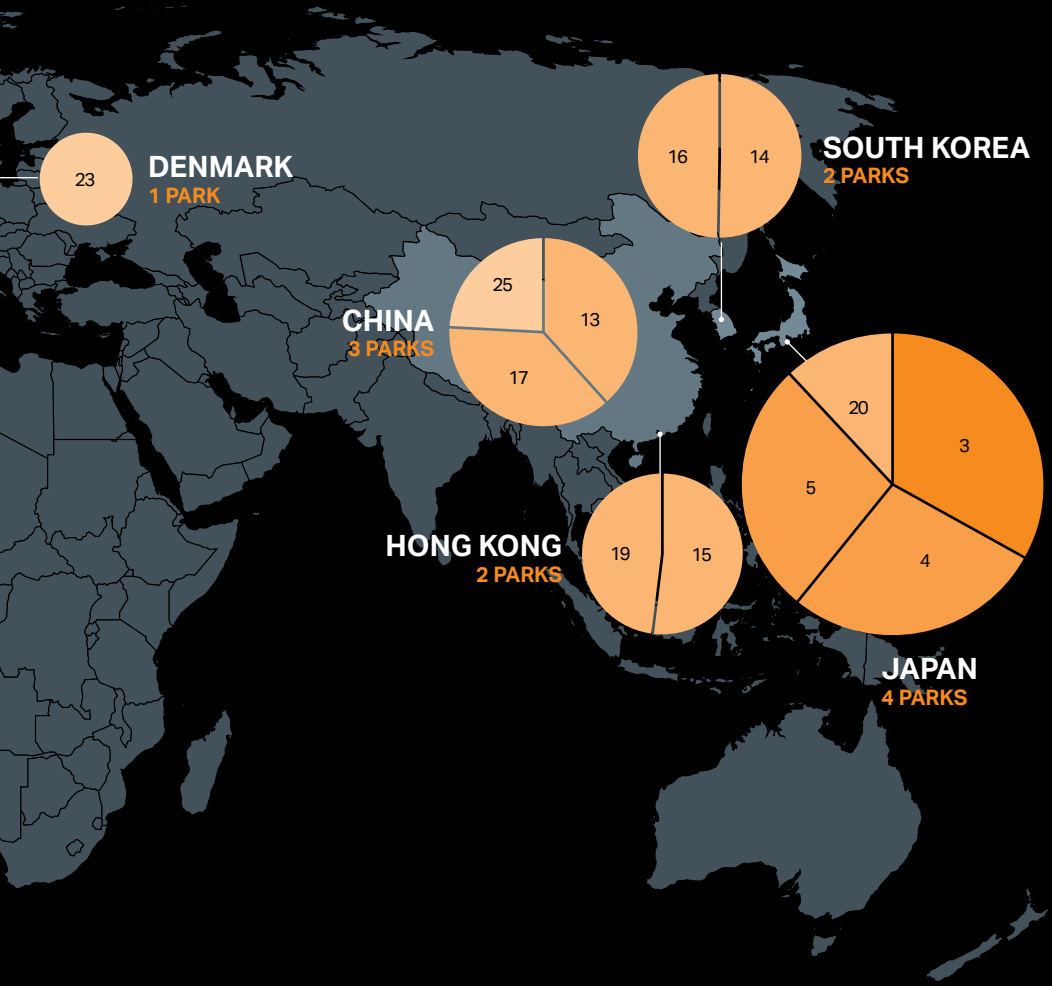
## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2006-15





**5.4%**

Top 25 amusement/theme parks attendance growth worldwide 2014-15

**235.6m**

Top 25 amusement/theme parks worldwide attendance 2015

**223.5m**

Top 25 amusement/theme parks worldwide attendance 2014

# TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE

RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	<b>MAGIC KINGDOM</b> at Walt Disney World, Lake Buena Vista, FL, U.S.	6.0%	20,492,000	19,332,000
2	<b>DISNEYLAND</b> , Anaheim, CA, U.S.	9.0%	18,278,000	16,769,000
3	<b>TOKYO DISNEYLAND</b> , Tokyo, Japan	-4.0%	16,600,000	17,300,000
4	<b>UNIVERSAL STUDIOS JAPAN</b> , Osaka, Japan	17.8%	13,900,000	11,800,000
5	<b>TOKYO DISNEY SEA</b> , Tokyo, Japan	-3.5%	13,600,000	14,100,000
6	<b>EPCOT</b> at Walt Disney World, Lake Buena Vista, FL, U.S.	3.0%	11,798,000	11,454,000
7	<b>DISNEY'S ANIMAL KINGDOM</b> at Walt Disney World, Lake Buena Vista, FL, U.S.	5.0%	10,922,000	10,402,000
8	<b>DISNEY'S HOLLYWOOD STUDIOS</b> at Walt Disney World, Lake Buena Vista, FL, U.S.	5.0%	10,828,000	10,312,000
9	<b>DISNEYLAND PARK AT DISNEYLAND PARIS</b> , Marne-la-Vallée, France	4.2%	10,360,000	9,940,000
10	<b>UNIVERSAL STUDIOS</b> at Universal Orlando, FL, U.S.	16.0%	9,585,000	8,263,000
11	<b>DISNEY'S CA ADVENTURE</b> , Anaheim, CA, U.S.	7.0%	9,383,000	8,769,000
12	<b>ISLANDS OF ADVENTURE</b> at Universal Orlando, FL, U.S.	8.0%	8,792,000	8,141,000
13	<b>CHIMELONG OCEAN KINGDOM</b> , Hengqin, China	36.0%	7,486,000	5,504,000

## 26.3%

Top 25 amusement/theme parks  
attendance growth worldwide  
2006-15

## 186.5m

Top 25 amusement/theme parks  
worldwide attendance 2006

RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
14	EVERLAND, Gyeonggi-Do, South Korea	0.6%	7,423,000	7,381,000
15	OCEAN PARK, Hong Kong SAR	-5.2%	7,387,000	7,792,000
16	LOTTE WORLD, Seoul, South Korea	-3.9%	7,310,000	7,606,000
17	HANGZHOU SONGCHENG PARK, Hangzhou, China	25.5%	7,289,000	5,810,000
18	UNIVERSAL STUDIOS HOLLYWOOD, Universal City, CA, U.S.	4.0%	7,097,000	6,824,000
19	HONG KONG DISNEYLAND, Hong Kong SAR	-9.3%	6,800,000	7,500,000
20	NAGASHIMA SPA LAND, Kuwana, Japan	4.3%	5,870,000	5,630,000
21	EUROPA-PARK, Rust, Germany	10.0%	5,500,000	5,000,000
22	SEAWORLD FL, Orlando, FL, U.S.	2.0%	4,777,000	4,683,000
23	TIVOLI GARDENS, Copenhagen, Denmark	5.7%	4,733,000	4,478,000
24	DE EFTELING, Kaatsheuvel, The Netherlands	6.4%	4,680,000	4,400,000
25	SONGCHENG LIJIANG ROMANCE PARK, Lijiang, China	170.4%	4,678,000	1,730,000
<b>TOP 25 TOTAL ATTENDANCE 2015</b>			<b>235,568,000</b>	<b>220,920,000</b>
<b>TOP 25 TOTAL ATTENDANCE 2014</b>			<b>5.4%</b>	<b>223,450,000</b>

# 5.4%

Top 25 amusement/theme parks attendance growth worldwide 2014-15

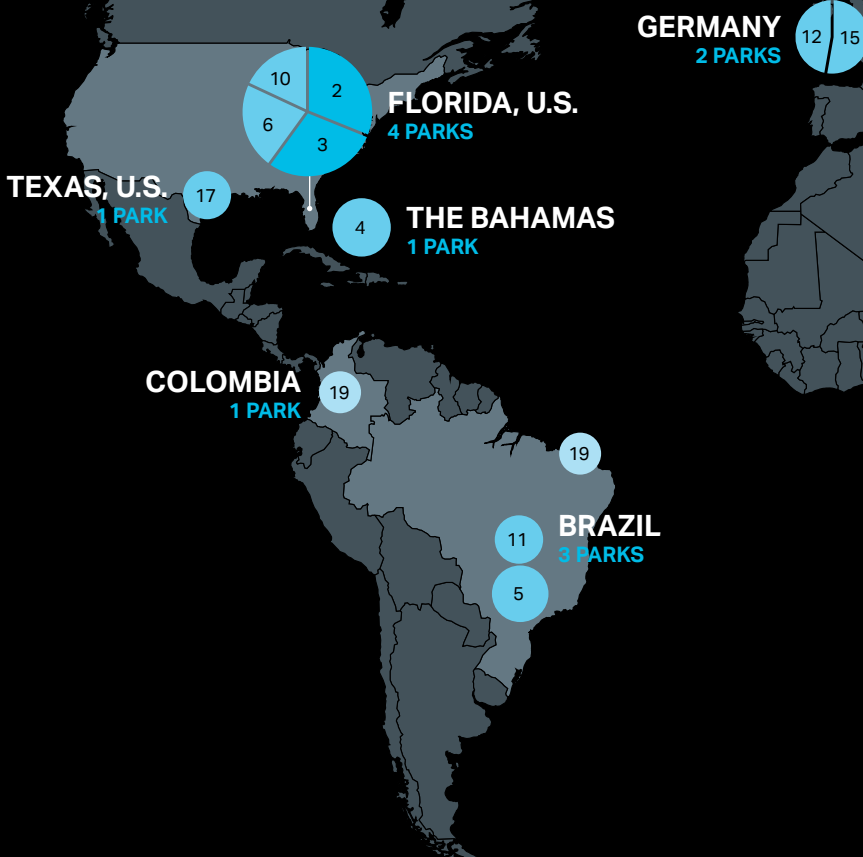
# 235.6m

Top 25 amusement/theme parks worldwide attendance 2015

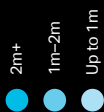
# 223.5m

Top 25 amusement/theme parks worldwide attendance 2014

# TOP 20 WATER PARKS WORLDWIDE

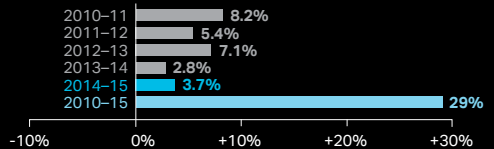


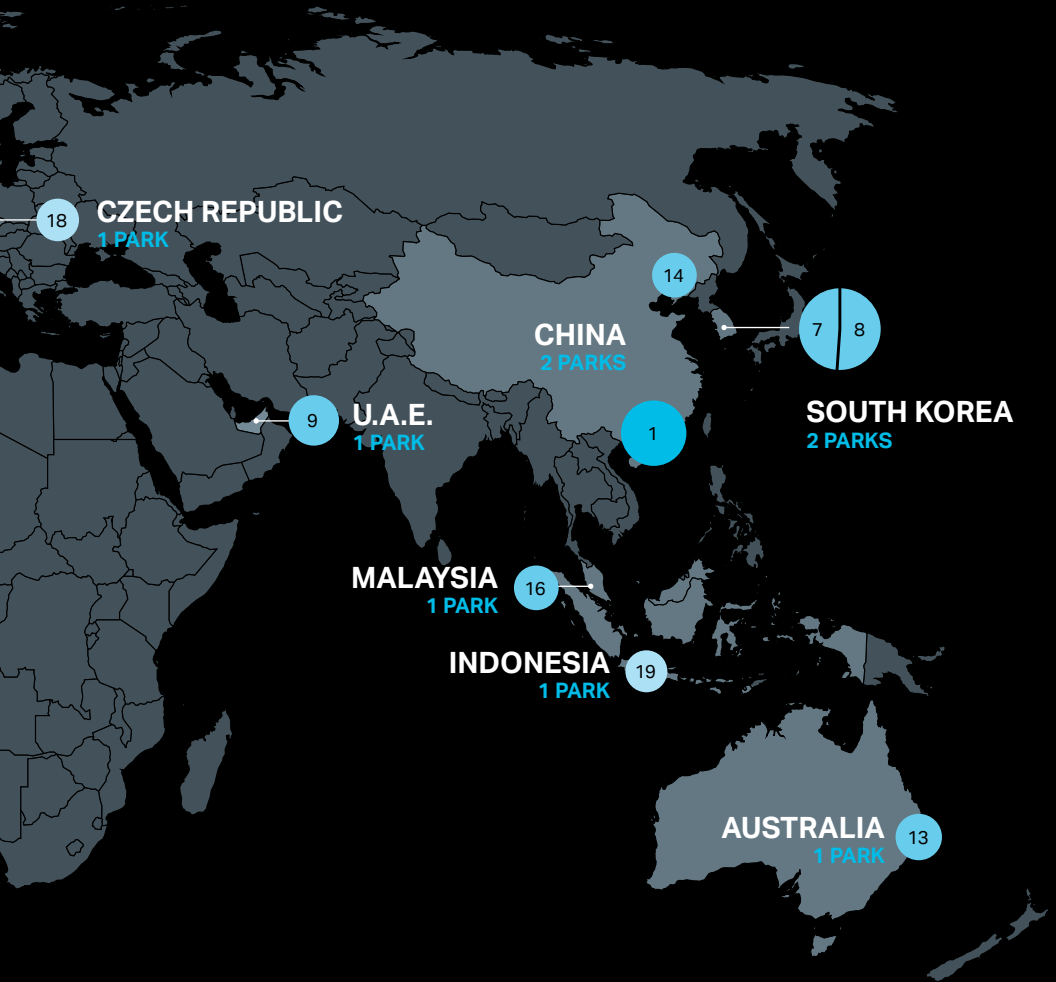
## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2010-15





**3.7%**

Top 20 water parks attendance growth worldwide 2014–15

**28.7m**

Top 20 water parks worldwide attendance 2015

**27.6m**

Top 20 water parks worldwide attendance 2014

# TOP 20 WATER PARKS WORLDWIDE

RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	CHIMELONG WATER PARK, Guangzhou, China	4.1%	2,352,000	2,259,000
2	TYPHOON LAGOON AT DISNEY WORLD, Orlando, FL, U.S.	5.0%	2,294,000	2,185,000
3	BLIZZARD BEACH AT DISNEY WORLD, Orlando, FL, U.S.	5.0%	2,107,000	2,007,000
4	BAHAMAS AQUAVENTURE WATER PARK, Paradise Island (Nassau, New Providence), Bahamas	1.0%	1,868,000	1,850,000
5	THERMAS DOS LARANJAIS, Olimpia, Brazil	-9.2%	1,761,000	1,939,000
6	AQUATICA, Orlando, FL, U.S.	2.0%	1,600,000	1,569,000
7	OCEAN WORLD, Gangwon-Do, South Korea	-5.9%	1,509,000	1,604,000
8	CARIBBEAN BAY, Gyeonggi-Do, South Korea	-4.0%	1,434,000	1,493,000
9	AQUAVENTURE WATER PARK, Dubai, U.A.E.	0.0%	1,400,000	1,400,000
10	WET 'N WILD, Orlando, FL, U.S.	2.0%	1,310,000	1,284,000



RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
11	<b>HOT PARK RIO QUENTE</b> , Caldas Novas, Brazil	0.0%	1,288,000	1,288,000
12	<b>THERME ERDING</b> , Erding, Germany	23.5%	1,235,000	1,000,000
13	<b>WET 'N' WILD GOLD COAST</b> , Gold Coast, Australia	0.0%	1,200,000	1,200,000
14	<b>SHENYANG ROYAL OCEAN PARK WATER WORLD</b> , Fushun, China	-1.9%	1,150,000	1,172,000
15	<b>TROPICAL ISLANDS</b> , Krausnick, Germany	10.0%	1,100,000	1,000,000
16	<b>SUNWAY LAGOON</b> , Kuala Lumpur, Malaysia	-2.1%	1,077,000	1,100,000
17	<b>SCHLITTERBAHN</b> , New Braunfels, TX, U.S.	0.0%	1,037,000	1,037,000
18	<b>AQUAPALACE</b> , Prague, Czech Republic	18.0%	997,000	845,000
19	<b>ATLANTIS WATER ADVENTURE</b> , Jakarta, Indonesia	1.0%	970,000	960,000
	<b>BEACH PARK</b> , Aquiraz, Brazil	2.2%	970,000	949,000
	<b>PISCILAGO</b> , Girardo (Bogotá), Colombia	-4.7%	970,000	1,018,000
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>28,659,000</b>	<b>28,141,000</b>
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>3.7%</b>	<b>27,627,000</b>

# 3.7%

Top 20 water parks attendance growth worldwide 2014–15

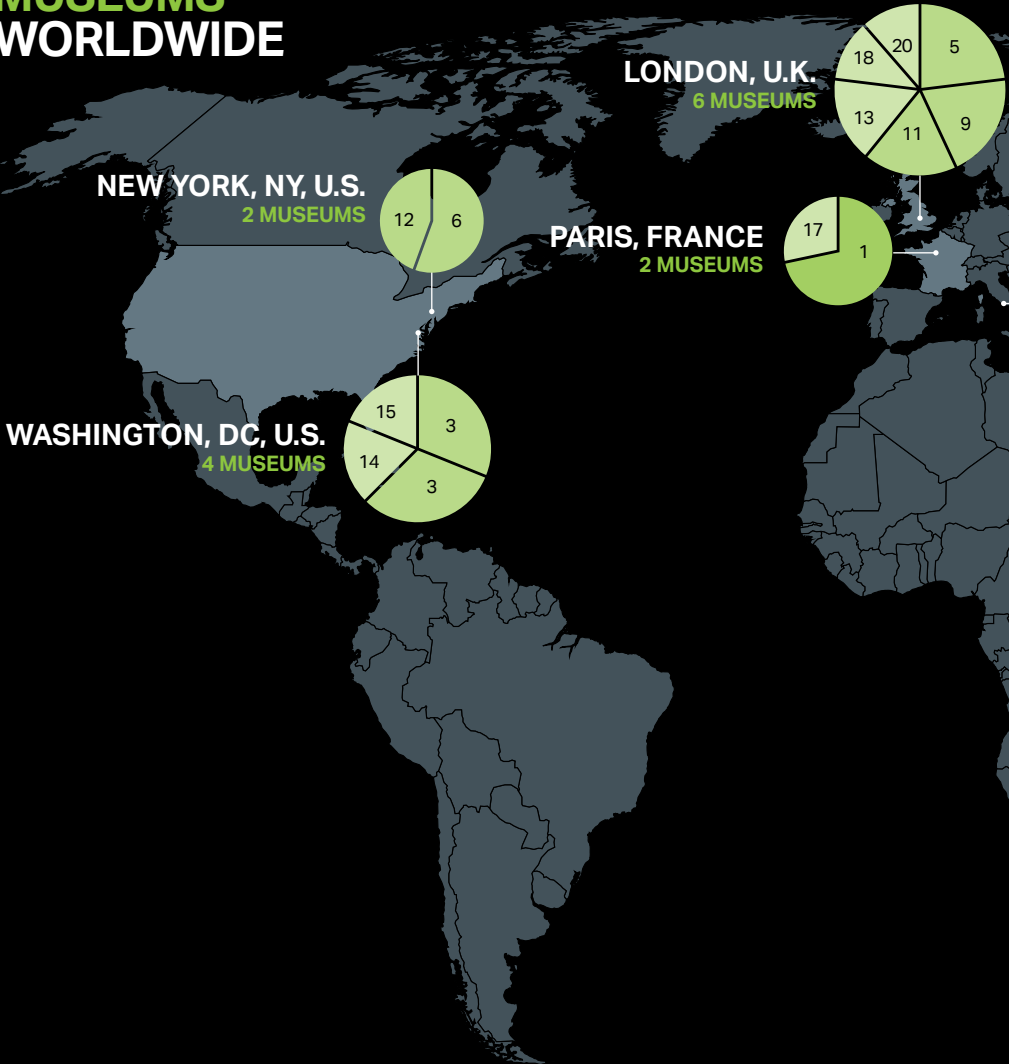
# 28.7m

Top 20 water parks worldwide attendance 2015

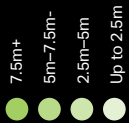
# 27.6m

Top 20 water parks worldwide attendance 2014

# TOP 20 MUSEUMS WORLDWIDE

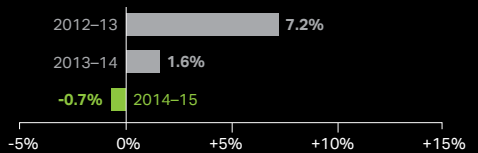


**Key**



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

**Growth 2012-15**





**-0.7%**

Top 20 museums attendance growth worldwide 2014-15

**106.5m**

Top 20 museums worldwide attendance 2015

**107.3m**

Top 20 museums worldwide attendance 2014

# TOP 20 MUSEUMS WORLDWIDE

RANK	MUSEUM Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014	FREE/PAID
1	<b>LOUVRE</b> , Paris, France	-6.5%	8,700,000	9,300,000	Paid
2	<b>NATIONAL MUSEUM OF CHINA</b> , Beijing, China	-4.5%	7,290,000	7,630,000	Free
3	<b>NATIONAL MUSEUM OF NATURAL HISTORY</b> , Washington, DC, U.S.	-5.5%	6,900,000	7,300,000	Free
	<b>NATIONAL AIR AND SPACE MUSEUM</b> , Washington, DC, U.S.	3.0%	6,900,000	6,700,000	Free
5	<b>BRITISH MUSEUM</b> , London, U.K.	1.9%	6,821,000	6,695,000	Free
6	<b>THE METROPOLITAN MUSEUM OF ART</b> , New York, NY, U.S.	1.6%	6,300,000	6,200,000	Paid
7	<b>VATICAN MUSEUMS</b> , Vatican, Vatican City	-2.8%	6,002,000	6,177,000	Paid
8	<b>SHANGHAI SCIENCE &amp; TECHNOLOGY MUSEUM</b> , Shanghai, China	40.9%	5,948,000	4,220,000	Paid
9	<b>NATIONAL GALLERY</b> , London, U.K.	-7.9%	5,908,000	6,417,000	Free
10	<b>NATIONAL PALACE MUSEUM (TAIWAN)</b> , Taipei, Taiwan	-2.1%	5,288,000	5,402,000	Paid

RANK	MUSEUM Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014	FREE/PAID
11	NATURAL HISTORY MUSEUM, London, U.K.	-1.9%	5,284,000	5,388,000	Free
12	AMERICAN MUSEUM OF NATURAL HISTORY, New York, NY, U.S.	0.0%	5,000,000	5,000,000	Paid
13	TATE MODERN, London, U.K.	-18.5%	4,713,000	5,785,000	Free
14	NATIONAL GALLERY OF ART, Washington, DC, U.S.	5.4%	4,104,000	3,892,000	Free
15	NATIONAL MUSEUM OF AMERICAN HISTORY, Washington, DC, U.S.	2.5%	4,100,000	4,000,000	Free
16	STATE HERMITAGE, St Petersburg, Russia	12.9%	3,668,000	3,248,000	Paid
17	MUSÉE D'ORSAY, Paris, France	-1.2%	3,440,000	3,481,000	Paid
18	VICTORIA & ALBERT MUSEUM, London, U.K.	7.9%	3,432,000	3,180,000	Free
19	CHINA SCIENCE TECHNOLOGY MUSEUM, Beijing, China	4.4%	3,360,000	3,218,000	Paid
20	SCIENCE MUSEUM (SOUTH KENSINGTON), London, U.K.	0.0%	3,356,000	3,356,000	Free
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>106,514,000</b>	<b>106,589,000</b>	
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>-0.7%</b>	<b>107,300,000</b>	

**-0.7%**

Top 20 museums attendance  
growth worldwide 2014–15

**106.5m**

Top 20 museums worldwide  
attendance 2015

**107.3m**

Top 20 museums worldwide  
attendance 2014

# THE AMERICAS



**5.9%**

Top 20 amusement/theme parks  
attendance growth North America  
2014–15

**146.3m**

Top 20 amusement/theme parks  
North America attendance 2015

**1.0%**

Top 10 amusement/theme parks  
attendance growth Latin America  
2014–15



**Brian Sands**  
Vice President,  
Economics, The  
Americas

## Remarkable growth in theme parks and water parks

### North American theme parks — up 5.9%

Last year we said everything was looking good in the Americas and poised for moderate growth — but 2015 blew the roof off moderate. This market did really well.

In theme parks, not only did the two top operators, Disney and Universal, both excel, the North American market as a whole did well, too. How well? Over the last couple years, the aggregate increase of the 20 top performing theme parks in North America was between 2% and 3.5% — good, steady, moderate growth. But it positively leapt beyond that in 2015 to an impressive 5.9% — almost three times the number for 2014. Disney was up 6% in attendance and alone accounted for nearly 40% of the growth by the top six operators in the U.S. (Disney, Universal, Sea World, Six Flags, Cedar Fair, and Merlin) — that's massive. Universal was up by a little over 9%, accounting for 18% of the top operators' attendance growth. But some of the regional chains also turned in impressive numbers. Six Flags was up a remarkable 11% and accounted for 22% of the top operators' growth. Cedar Fair was also up 4.9%, and Merlin was up 15%, albeit from a relatively low base in North America.

© Bootleggers Run,  
Splish Splash Water Park,  
Calverton, NY, U.S.

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From the perspective of a decade, the 10-year growth in this market is 22% — from about 120 M visits in pre-recession 2006, to more than 146 M in post-recession 2015, and including the low point of 2009.

North America's 5.9% stands up well even in the face of fast growing Asia, where the top performing parks were up 6.9% in 2015.

### **IP and the immersion factor**

What were some primary factors?  
Intellectual property (IP) was a big one. Universal's numbers continue to be driven primarily by Harry Potter at Universal

Orlando. Next year we'll see what the IP has done for Universal Hollywood, as well as how Universal begins to leverage its acquisition of DreamWorks.

With Disney, it's a combination of continuing to do many things well and the anticipation factor of Star Wars. We expect to see Disney realize many opportunities to satisfy guests over the next few years as Star Wars attractions, Star Wars lands and Star Wars character interactions unfold — and even before that happens, they're making the most of the anticipation with walk-throughs, stage shows, Jedi training camp and, naturally, retail — plenty of retail.

Magic Kingdom, © Walt Disney World®, Lake Buena Vista, FL, U.S.







“

## Visitation to Orlando has reportedly more than doubled over the past 20 years, growing from 32.4 M in 1995 to 66.1 M in 2015.

”

Themed and branded experiences are becoming ever more immersive, comprehensive, complete, and intimate from the guest's experience, starting online, extending to their approach to the park, the park itself obviously, and then again after the park via online communications. All of this translates to a better guest experience, longer stays, more repeat visits and more per cap spending.

### Good rides and smart business

Good rides and good marketing continue to prove their worth at all parks. The healthy attendance increase posted by Six Flags parks owes a lot to both; keeping regional markets and local fan base happy with new,

high-tech rides such as Justice League, which features DC Comics characters; with exciting new roller coasters and other improvements, plus discounts to encourage purchase of annual passes. Cedar Fair had similar success via such new attractions as Iron Reef at Knott's Berry Farm.

Catering to destination tourism as well as regional markets pays off. Orlando's tourism numbers were strong — they didn't fall off even though Latin America was hurting economically and more Latin Americans stayed home in 2015. In fact, visitation to Orlando has reportedly more than doubled over the past 20 years, growing from 32.4 M in 1995 to 66.1 M in 2015, solidifying Orlando's position as the most

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visited destination in the nation, thanks undoubtedly to the large and continued investments made in its theme parks, resorts, and related amenities.

Beyond attendance, the parks are simply doing smarter business, leaving less money on the table through variable pricing, better retail offerings that make shopping and dining an extension of the branded experience, and through embracing the integrated resort model of operation — reinforcing immersion. So even when attendance is flat, per caps revenue can be strong.

At SeaWorld parks, 2015 attendance numbers were basically flat, up 0.3% total, driven by mixed performance across their portfolio. Since taking the helm about a year ago, CEO Joel Manby, who has a strong track record from his years at the head of Herschend Family Entertainment, has put together a strong team and begun visibly

addressing the challenges. Integrated resorts are on the drawing board for SeaWorld's future.

### The resort model

The integrated resort reinforces the immersion factor by encouraging guests to remain in the operator's territory, within the experience bubble. Extend the stay, keep the revenue, serve up a more unified experience to the guest — that's a win-win-win that transforms a theme park or a water park into a multi-day destination, and has a ripple economic effect in the region.

Disney has long been a major resort operator with tremendous revenue, an unbeatable lifestyle brand and an expanding portfolio of leisure offerings. Looking regionally and sub-regionally, some of the smaller operators have also practiced this for a while to good effect. Examples include Herschend's offerings in the Pigeon Forge,

The New Revolution Virtual Reality Coaster, © Six Flags Magic Mountain, Valencia, CA, U.S.





TN area around Dollywood, as well as what Merlin Entertainments has been doing to leverage the popular LEGO IP, having added both a LEGOLAND park and a hotel near Orlando, a second hotel at LEGOLAND Carlsbad and looking at additional hospitality elements. Merlin is also considering new lodging types for its Orlando park.

The challenge is keeping the balance of elements — lodging, retail, dining and entertainment. Oversize the lodging product and the whole project suffers. On the other hand, create a compelling multi-day experience, single or multi-gated, with well-designed retail, dining and entertainment, and lodging that allows access to the park as well as separation

from those park guests not staying at the lodging, and you can achieve the holy grail of success. We're seeing Universal move into that space in a big way: in Orlando having opened Cabana Bay, and opening Sapphire Falls this year and Volcano Bay next year — getting in on the water park side. Tourists coming in for a week or more are looking for a range of experiences.

Helping to diversify the offering for tourists in Orlando and to grow its presence in the market, Merlin opened The Orlando Eye observation experience, a SEA LIFE Aquarium, and a Madame Tussauds, thereby anchoring the new I Drive 360 retail-dining-entertainment (RDE) center on International Drive.

**6.0%**

Magic Kingdom at Walt Disney World, attendance growth 2014–15

**16.0%**

Universal Studios at Universal Orlando, attendance growth 2014–15

**8.0%**

Cedar Point, Sandusky, attendance growth 2014–15

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## North American water parks — up 4.3%

Overall, water park attendance numbers in North America were also up significantly in 2015 for the Top 20 facilities — at 4.3%, nearly tripling the growth rate in 2014 numbers — a remarkably strong showing after the past two years' flat to negative numbers.

Looking back at attendance over a 10-year period for this market shows growth from slightly under 12 M to nearly 14 M, an increase of 17% for the decade. (Last year we began tabulating for the Top 20 but that's taken into account here.) Although that's not quite as much as the 22% growth over the equivalent period in North America's top theme parks, it's very good.

Driving 2015 growth for North American water parks were several with particularly healthy increases, including Typhoon Lagoon and Blizzard Beach, both up 5%

(around 100,000 each), benefiting from overall growth of the Orlando market. Also showing strong growth were Splish Splash, up 22% and Camelbeach, up 31%. More than 100k visits were tallied for Camelbeach which benefited from the opening of the Camelback Lodge and Aquatopia Indoor Water Park as the resort continues its development as a serious, year round destination. Splish Splash benefited primarily from a very hot and dry summer in that part of the world as well as some minor renovations.

Our charts for 2015 show a new entrant: Wet'n'Wild splash town near Houston, a park recently acquired and improved by CNL Properties. The benefits of CNL's multi-million-dollar reinvestment brought attendance numbers up to about a half million in 2015, spelling new competition in a region dominated by Schlitterbahn.

## Latin America

Though growth was modest at the Latin American theme parks in 2015, adding 1.0% to reach 14.7 M, the top theme parks in Latin America grew 33% over the last 10 years, which denotes strong growth, though from a relatively modest base. In Latin America's theme park and water park scene, we see encouraging growth and innovation in several respects, as well as areas that show room for future improvement. The region's economic and political volatility are apparent in the varying performance of the parks.

For Latin America's water parks, 2015 was a disappointing year for the most part, with some exceptions. At 9.5 M attendance for the top water parks, performance was



© Camelbeach, Tannersville, PA, U.S.

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basically flat. (We just started tracking these in 2013, so don't have a figure for 10-year growth yet.)

A struggling economy and currency decline relative to the dollar reduced tourism from Latin America to Orlando, and increased local visitation. This helped boost attendance by 10.0% at Brazil's Beto Carrero (with 2014 attendance restated, resulting in a modest increase), a multifaceted park that also benefited from having added some new kids' adventure areas, and good social media exposure.

A major attendance drop at Fantasilandia in Chile was due to the economy, which is certainly creating headwinds for many park operators in the region. Despite having added new features, Thermas dos Laranjais, Brazil, declined by more than 9%, due to a combination of the economy and an accident. Piscilago in Columbia posted an attendance decline of about 5%. Attendance at Bahamas Aquaventure has been restated for 2014, placing it at the top of Latin American water parks.

Despite the weak overall regional performance, a number of water parks performed very well. Parque Acuatico Xocomilin Guatemala credited a new area opened the previous year in the adjoining theme park (El Gran Parque de Diversiones Xetulul) for bringing in 22.6% more visitors. Parque Aquatic El Rollo in Mexico helped push attendance 8.5% with a new FlowRider and a giant inflatable slide. Beach Park also grew modestly (2.2%), likely helped by the economy pushing Brazilians to vacation in-country rather than in Orlando, for example.



Though it doesn't have parks in the top lists, the properties of Grupo Xcaret in the Cancun area are understood to have experienced good attendance growth, benefiting from the general growth of tourism from North America to Mexico. Many larger properties in Latin America and Mexico, especially those with water parks, do well as part of integrated resorts. But Xcaret focuses more on developing new attractions and experiences of high quality along with sub-brands and products, successfully capturing a large share of the eco-tourism and specialty attractions market with a range of activities and adventures, natural beauty, history and culture. It's a smart, authentic, well-located and clustered attractions product line that is right-sized and positioned to serve the regional market, and one that is growing over time.

# PERFORMANCE OF TOP OPERATORS IN NORTH AMERICA

This year we are including this special section reviewing the topline performance of the major operators in the North American market. As shown in the graphs below, despite the maturity of the market, it was generally a good year for the operators and in some cases it was remarkable.



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## The power of per caps

In total, estimated revenue at the top operators grew from \$16.6 B in 2014 to \$18.3 B in 2015, an increase of \$1.7 B or 10.4%. Growth of attendance was not quite as strong, but still very healthy, increasing from 186.8 M in 2014 to 199.5 M in 2015, an increase of 12.6 M or 6.8%. Combining these figures results in an increase in average revenue per attendee (or per capita) grew from \$88.80 to \$91.79, an increase of \$2.99 or 3.4%. While this may appear relatively modest, by comparison U.S. gross domestic product (GDP) grew by only 2.4% and the S&P 500 declined marginally (-0.7%).

Performance at the operator level varied considerably. Disney reports on a fiscal year basis and with the Parks and Resorts segment combined, with our estimate that the Parks sub-segment (i.e., excluding Resorts) had revenue of nearly \$10.9 B in 2015, an increase of \$983 M or 9.9% over the estimate of almost \$9.9 B in 2014. Disney remains far and away the largest operator, and singlehandedly accounted for 57% of the total revenue growth in 2015.

Attendance at Disney's domestic parks was estimated up a remarkable 6.0 percent last year, reaching 86.1 M visitors, and accounting for 39% percent of the total increase at the top operators. This

was driven by such factors as the 60th anniversary of Disneyland, the continued success of its major films with ties-in to its park, and associated investments. Taken together, we estimate that revenue at Disney's parks grew to over \$126 per visitor, an increase of 3.7%.

Universal's Theme Parks segment also performed very well, with estimated net revenue (excluding estimated revenues associated with its hotels and Universal Japan) reaching nearly \$3.1 B, up by \$522 M or 20.5%. Similarly, estimated attendance growth was strong at 9.3%, increasing attendance to 26.8 M, continuing to be primarily driven by its ongoing Harry Potter-related investments. The combined effect was estimated growth in revenue per attendee to Universal parks of 10.3%, pushing it over \$114 per visitor.

Cedar Fair had revenue growth of 7.5%, which when combined with its attendance growth of 4.9%, meant that revenue per attendee increased modestly by 1.6% to reach well over \$50 per visitor. Six Flags and Merlin also both grew revenues, but this was exceeded by attendance growth, which pushed down revenue per attendee for both. SeaWorld slightly grew attendance, but also experienced a modest decline in revenue, which resulted in a small decline in revenue per visitor.

These figures underscore a number of important industry axioms. First, it all starts and ends with the guest experience, which is driven by “the story” and its realization at the park, both of which require significant initial investment and regular reinvestment. Second, the importance of attendance as a metric is superseded by that of revenue, and ultimately profitability. Finally, if done right, it can be easier to get visitors to spend more than it is to get new visitors.

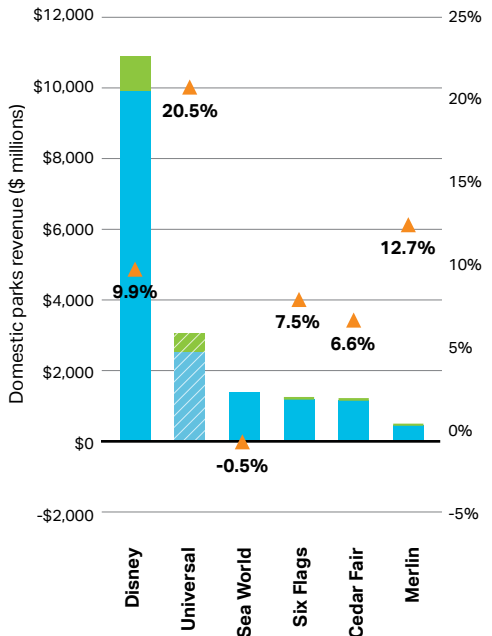
Note that where possible, the information in this special section was taken from public filings and other corporate releases, with estimates made by AECOM where information was unavailable or insufficiently detailed.

### Summary Indicators, Top Operators in North America, 2014 and 2015

	REVENUE	ATTENDANCE	REVENUE PER CAPITA
<b>2014</b>	\$16.6B	186.8M	\$88.80
<b>2015</b>	\$18.3B	199.5M	\$91.79
<b>2015 Change</b>	\$1.7B	12.6M	\$2.99
<b>% Change 2014–15</b>	10.4%	6.8%	3.4%

- 2014
- 2015
- ▲ % change
- ▨ estimated

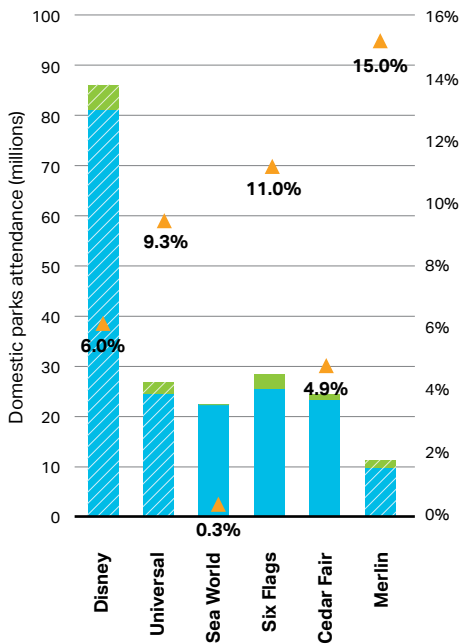
### Revenue grew



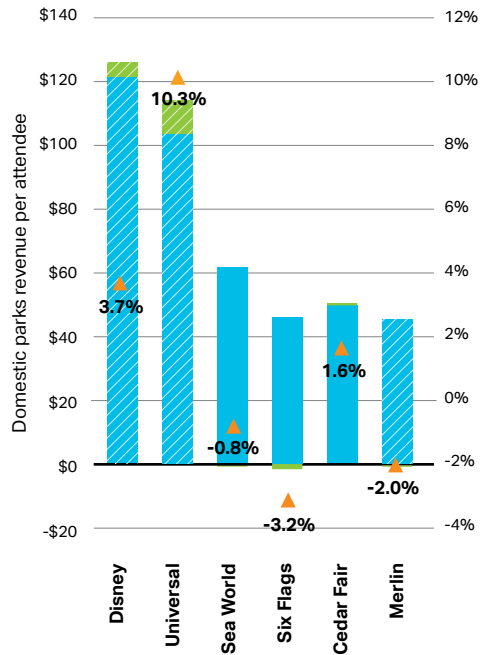




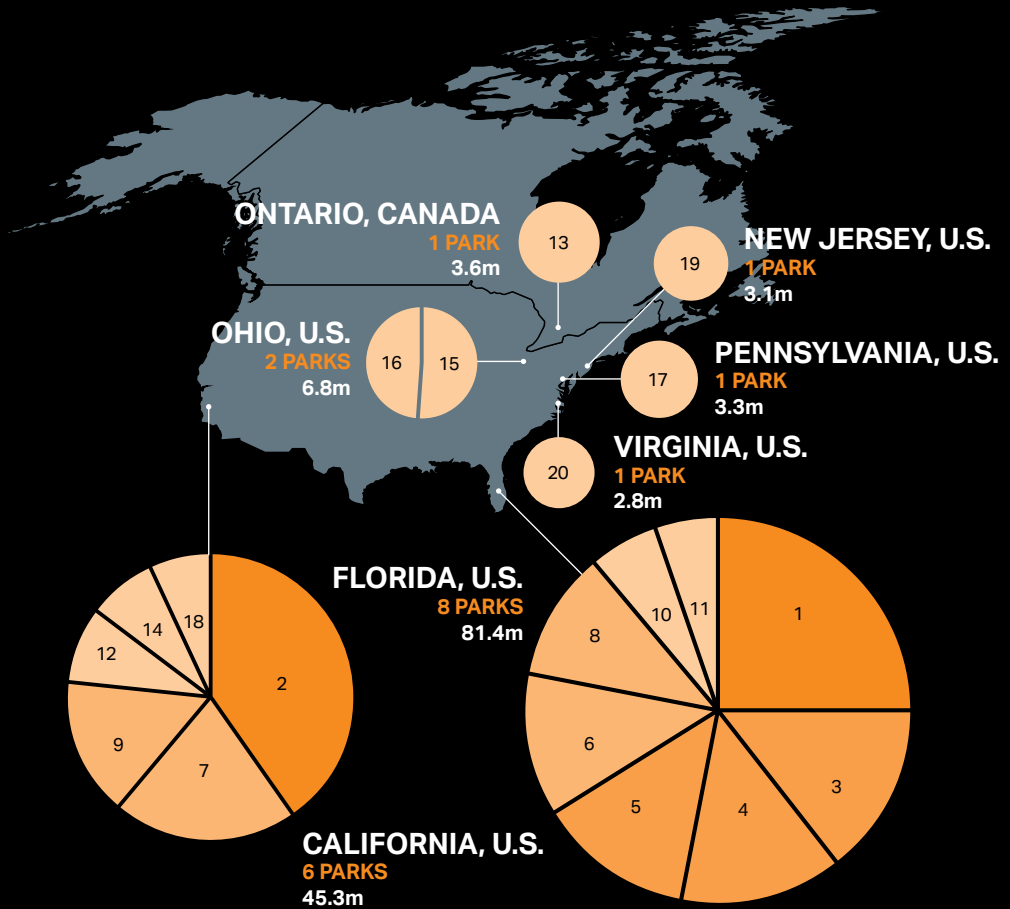
### Attendance grew



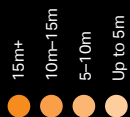
### Revenue per attendee was mixed



# TOP 20 AMUSEMENT/THEME PARKS NORTH AMERICA

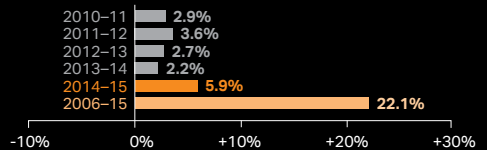


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2006-15



RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	<b>MAGIC KINGDOM</b> at Walt Disney World, Lake Buena Vista, FL	6.0%	20,492,000	19,332,000
2	<b>DISNEYLAND</b> , Anaheim, CA	9.0%	18,278,000	16,769,000
3	<b>EPCOT</b> at Walt Disney World, Lake Buena Vista, FL	3.0%	11,798,000	11,454,000
4	<b>DISNEY'S ANIMAL KINGDOM</b> at Walt Disney World, Lake Buena Vista, FL	5.0%	10,922,000	10,402,000
5	<b>DISNEY'S HOLLYWOOD STUDIOS</b> at Walt Disney World, Lake Buena Vista, FL	5.0%	10,828,000	10,312,000
6	<b>UNIVERSAL STUDIOS</b> at Universal Orlando, FL	16.0%	9,585,000	8,263,000
7	<b>DISNEY'S CA ADVENTURE</b> , Anaheim, CA	7.0%	9,383,000	8,769,000
8	<b>ISLANDS OF ADVENTURE</b> at Universal Orlando, FL	8.0%	8,792,000	8,141,000
9	<b>UNIVERSAL STUDIOS HOLLYWOOD</b> , Universal City, CA	4.0%	7,097,000	6,824,000
10	<b>SEAWORLD FL</b> , Orlando, FL	2.0%	4,777,000	4,683,000
11	<b>BUSCH GARDENS TAMPA BAY</b> , Tampa, FL	3.0%	4,252,000	4,128,000
12	<b>KNOTT'S BERRY FARM</b> , Buena Park, CA	5.0%	3,867,000	3,683,000
13	<b>CANADA'S WONDERLAND</b> , Maple, Ontario	2.0%	3,617,000	3,546,000
14	<b>SEAWORLD CA</b> , San Diego, CA	-7.0%	3,528,000	3,794,000
15	<b>CEDAR POINT</b> , Sandusky, OH	8.0%	3,507,000	3,247,000
16	<b>KINGS ISLAND</b> , Kings Island, OH	3.0%	3,335,000	3,238,000
17	<b>HERSHEY PARK</b> , Hershey, PA	2.0%	3,276,000	3,212,000
18	<b>SIX FLAGS MAGIC MOUNTAIN</b> , Valencia, CA	9.0%	3,104,000	2,848,000
19	<b>SIX FLAGS GREAT ADVENTURE</b> , Jackson, NJ	9.0%	3,052,000	2,800,000
20	<b>BUSCH GARDENS WILLIAMSBURG</b> , Williamsburg, VA	3.0%	2,780,000	2,699,000
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>146,270,000</b>	<b>138,144,000</b>
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>5.9%</b>	<b>138,144,000</b>

# 5.9%

Top 20 amusement/theme parks attendance growth North America 2014-15

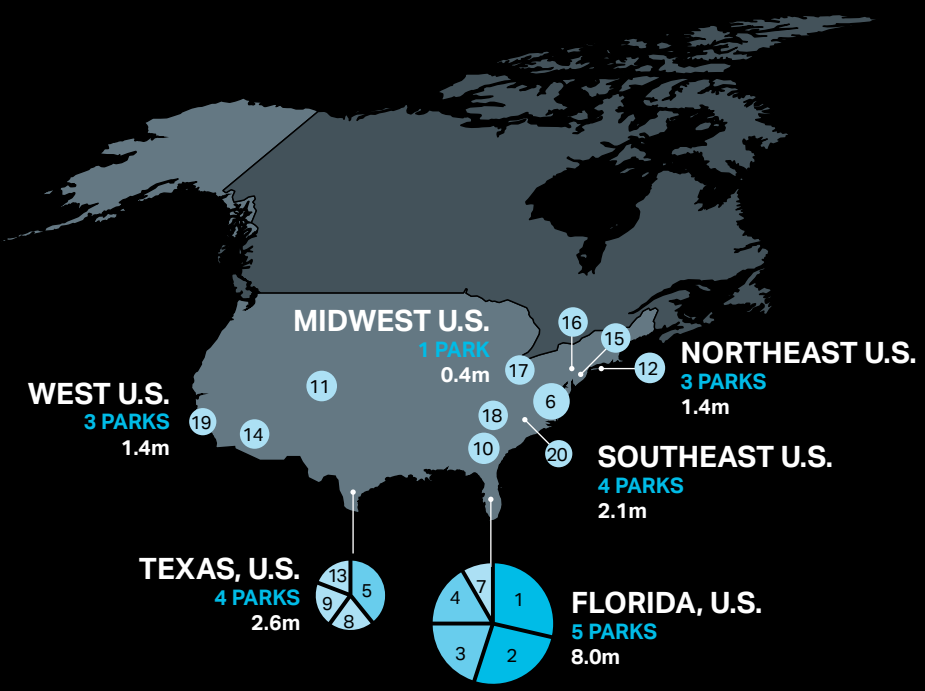
# 146.3m

Top 20 amusement/theme parks North America attendance 2015

# 138.1m

Top 20 amusement/theme parks North America attendance 2014

# TOP 20 WATER PARKS NORTH AMERICA

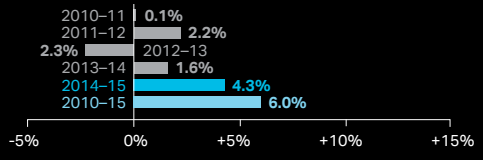


**Key**



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

**Growth 2010-15**



RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	<b>TYPHOON LAGOON AT DISNEY WORLD</b> , Orlando, FL	5.0%	2,294,000	2,185,000
2	<b>BLIZZARD BEACH AT DISNEY WORLD</b> , Orlando, FL	5.0%	2,107,000	2,007,000
3	<b>AQUATICA</b> , Orlando, FL	2.0%	1,600,000	1,569,000
4	<b>WET 'N WILD</b> , Orlando, FL	2.0%	1,310,000	1,284,000
5	<b>SCHLITTERBAHN</b> , New Braunfels, TX	0.0%	1,037,000	1,037,000
6	<b>WATER COUNTRY USA</b> , Williamsburg, VA	0.0%	726,000	726,000
7	<b>ADVENTURE ISLAND</b> , Tampa, FL	3.0%	663,000	644,000
8	<b>SCHLITTERBAHN</b> , Galveston, TX	0.0%	551,000	551,000
9	<b>SIX FLAGS-HURRICANE HARBOR</b> , Arlington, TX	5.0%	549,000	523,000
10	<b>SIX FLAGS-WHITE WATER</b> , Marietta, GA	6.1%	541,000	510,000
11	<b>HYLAND HILLS WATER WORLD</b> , Denver, CO	0.0%	527,000	527,000
12	<b>SPLISH-SPASH</b> , Calverton NY	21.9%	513,000	421,000
13	<b>WET'N'WILD SPLASHTOWN</b> , Houston, TX	0.8%	501,000	497,000
14	<b>WET N' WILD</b> , Phoenix, AZ	3.0%	481,000	467,000
15	<b>SIX FLAGS HURRICANE HARBOR</b> , Jackson, NJ	4.0%	440,000	423,000
16	<b>CAMEL BEACH</b> , Tannersville, PA	30.8%	437,000	334,000
17	<b>ZOOMEZI BAY</b> , Powell, OH	1.7%	423,000	416,000
18	<b>DOLLYWOOD'S SPLASH COUNTRY</b> , Pigeon Forge, TN	2.0%	416,000	408,000
19	<b>RAGING WATERS</b> , San Dimas, CA	-6.1%	403,000	429,000
20	<b>WET N' WILD EMERALD POINT</b> , Greensboro, NC	1.0%	402,000	398,000
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>15,921,000</b>	<b>15,356,000</b>
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>4.3%</b>	<b>15,268,000</b>

# 4.3%

Top 20 water parks attendance  
growth North America 2014–15

# 15.9m

Top 20 water parks North  
America attendance 2015

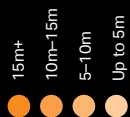
# 15.3m

Top 20 water parks North  
America attendance 2014

# TOP 10 AMUSEMENT/THEME PARKS LATIN AMERICA AND CARIBBEAN

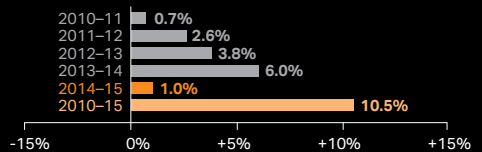


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2010-15



RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	SIX FLAGS MEXICO, Mexico City, Mexico	0.0%	2,368,000	2,368,000
2	BETO CARRERO WORLD, Santa Catarina, Brazil	10.0%	2,000,000	1,818,000*
3	HOPI HARI, São Paulo, Brazil	0.0%	1,668,000	1,668,000
4	LA FERIA DE CHAPULTEPEC, Mexico City, Mexico	2.1%	1,584,000	1,552,000
5	PARQUE MUNDO AVENTURA, Bogotá, Colombia	-2.4%	1,389,000	1,423,000
6	PARQUE XCARET, Cancun, Mexico	6.2%	1,287,000	1,212,000
7	PLAZA DE SESAMO, Monterrey, Mexico	0.0%	1,221,000	1,221,000
8	MUNDO PETAPA, Guatemala City, Guatemala	5.4%	1,199,000	1,138,000
9	FANTASIALANDIA, Santiago, Chile	-9.7%	1,003,000	1,111,000
10	PARQUE DE LA COSTA, Tigre, Argentina	-6.3%	956,000	1,020,000
<b>TOP 10 TOTAL ATTENDANCE 2015</b>			<b>14,675,000</b>	<b>14,531,000*</b>
<b>TOP 10 TOTAL ATTENDANCE 2014</b>			<b>1.0%</b>	<b>14,531,000*</b>

\* Figure restated since 2014 Theme Index

# 1.0%

Top 10 amusement/theme parks attendance growth Latin America 2014–15

# 14.7m

Top 10 amusement/theme parks Latin America attendance 2015

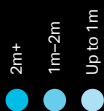
# 14.5m\*

Top 10 amusement/theme parks Latin America attendance 2014

# TOP 10 WATER PARKS LATIN AMERICA AND CARIBBEAN

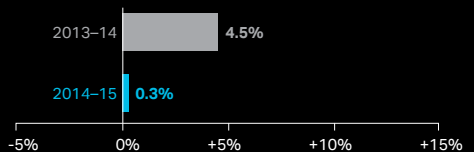


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2013-15





RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	<b>BAHAMAS AQUAVENTURE WATER PARK,</b> Paradise Island (Nassau, New Providence), Bahamas	1.0%	1,868,000	1,850,000*
2	<b>THERMAS DOS LARANJAIS,</b> Olimpia, Brazil	-9.2%	1,761,000	1,939,000
3	<b>HOT PARK RIO QUENTE,</b> Caldas Novas, Brazil	0.0%	1,288,000	1,288,000
4	<b>PISCILAGO,</b> Girardo (Bogotá), Colombia	-4.7%	970,000	1,018,000
	<b>BEACH PARK,</b> Aquiraz, Brazil	2.2%	970,000	949,000
6	<b>PARQUE ACUATICO XOCOMIL,</b> San Martín Zapotitlán, Retalhuleu, Guatemala	22.6%	940,000	767,000
7	<b>PARQUE ACUATICO EL ROLLO,</b> Morelos, Mexico	8.5%	510,000	470,000*
8	<b>WET 'N WILD SAO PAULO,</b> São Paulo, Brazil	0.0%	496,000	496,000
9	<b>RIO WATER PLANET,</b> Rio de Janeiro, Brazil	0.0%	400,000	400,000
10	<b>WET 'N WILD,</b> Cancun, Mexico	1.6%	259,000	255,000
<b>TOP 10 TOTAL ATTENDANCE 2015</b>			<b>9,462,000</b>	<b>9,432,000*</b>
<b>TOP 10 TOTAL ATTENDANCE 2014</b>			<b>0.3%</b>	<b>9,432,000*</b>

\* Figure restated since 2014 Theme Index

# 0.3%

Top 10 water parks attendance growth Latin America 2014–15

# 9.5m

Top 10 water parks Latin America attendance 2015

# 9.4m\*

Top 10 water parks Latin America attendance 2014

# ASIA-PACIFIC



**6.9%**

Top 20 amusement/theme parks  
attendance growth Asia-Pacific  
2014-15

**130.9m**

Top 20 amusement/theme parks  
Asia-Pacific attendance 2015

**19.6m**

Top 20 water parks Asia-Pacific  
attendance 2015



**Chris Yoshii**  
Vice President,  
Asia-Pacific

**Beth Chang**  
Regional Director,  
Economics, Asia-Pacific


## Theme parks: 6.9% attendance increase is Mainland China driven

### The impact of Chimelong and Songcheng

At 6.9%, attendance at the top theme parks in the Asia-Pacific region for 2015 reflects a year of strong growth. This number, which is good compared to previous years, was driven almost entirely by Mainland China, the primary factor being the many new parks that have recently completed their first full year of operation.

These included Chimelong Ocean Kingdom, which with 7.5 M attendance posted a 36% increase over 2014 and moved up to the #4 position on the chart. On the resort side, Ocean Kingdom added a second and third hotel, bringing its room total to more than 4,000. On the park side, a new 5D theater was added. These were backed by quite a bit of online marketing and promotion.

Songcheng Group is another major entrant, posting a 53% increase in total attendance for 2015. Due to the success of several new parks, Songcheng made a big splash on our charts — both the top 10 worldwide theme park operators and the top 20 theme parks within Asia.



Chimelong 5D Castle  
Theater, © Chimelong Ocean  
Kingdom, Hengqin, China

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The Songcheng parks' main feature is live, theatrical shows with a cultural theme. These shows are quite popular with tourists and the parks are well located — in Hangzhou, Lijiang and Sanya — to make the most of tour group business, especially within the mainland. The combination of high-traffic locations, live shows and culture and a relatively small footprint is a winner for Songcheng.

There's been a fair amount of press about softness in China's economy, but that reflects a shift from manufacturing to service. If you look at services, tourism and education, these things are booming. Entertainment spending is going up very fast; spending on education is increasing. This all spells good news for our tourism

and leisure-based industry. Developers are supporting that service industry; projects are getting approved and financed, and the amount of themed entertainment product keeps growing.

### Outside China, highs and lows

Results were more mixed for theme parks in other Asian countries than China, for 2015. With attendance of 13.9 M, Universal Studios Japan had a very good year, in fact beating their previous record year with a near 18% increase and lifting it to the position of #2 park in Asia (beating out Tokyo Disney Sea). This can be credited to its first full year of operation with the Harry Potter attractions.



The Wizarding World of Harry Potter™,  
© Universal Japan, Tokyo, Japan



## Universal Studios Japan had a very good year, in fact beating their previous record year with a near 18% increase. ”

In Korea, Everland was stable while Lotte World showed a decrease that can be interpreted as a fallback after a slate of new attractions brought an attendance surge in 2014.

In Hong Kong, Ocean Park and Disney both declined in visitation, attributable to fewer tourists from Mainland China, although the residential market remained strong. There had been protests in Hong Kong concerning tourism, which has grown significantly there in recent years. The protests prompted many Chinese to avoid Hong Kong and travel to other places such as Japan and Thailand.

Universal Studios Singapore saw a very good increase of 9% for 2015, quite strong. And it's worth noting that in Southeast Asia, many parks are doing well, although their numbers are not always big enough to earn a place on our top-attended lists. All in all, 2015 was a pretty good year for theme parks in Asia.

### Water parks: Chimelong on top again

Overall, water park visitation in 2015 in the Asia-Pacific region was slack, about 1% total for the top attended parks.

Weather was the culprit in Korea, which had a very wet summer. But even though Korea had a down year, the status and outlook of the water park scene in Asia are positive. China saw many new entries into the market — a huge construction boom in fact, that will influence the numbers in the future.

Chimelong Water park added attendance and maintained its status as the #1 water park in the world, even in the face of Disney's very good year back in the U.S., with Typhoon Lagoon and Blizzard Beach. Asia's water park sector outgrew North America's a couple of years ago and that position will be maintained. Part of the credit goes to Southeast Asia, where the weather supports year-round operation.

**17.8%**

Universal Studios Japan attendance growth 2014–15

**36%**

Chimelong Ocean Kingdom, China, attendance growth 2014–15

**170.4%**

Songcheng Lijiang Romance Park, China, attendance growth 2014–15



Water parks are harder to track than theme parks in Asia. They are being built at a faster pace — there might be as many as five water parks being built for every new theme park. Water parks also tend to be smaller and locally based.

### A volatile, growing market

Volatility will continue to be a hallmark of the Asia-Pacific market, as it is still growing rapidly and may not stabilize for perhaps another decade. The sector is still a long way from saturation and maturity. This will

shake up our charts each year with parks and operators climbing up and dropping off. As attendance increases at the top parks, it also raises the minimum attendance a park needs to achieve in order to stay on the charts.

Next year's charts will reflect the first half-year of attendance at Shanghai Disney, opening this season. Once it has been open a full year, we will have a better sense of when the Asian parks market will overtake North America altogether — whether it will be around 2020 as we've



**Volatility will continue to be a hallmark of the Asia-Pacific market, as it is still growing rapidly and may not stabilize for perhaps another decade.**





## **Disney Shanghai will be a watershed event. It is expected to do very well and have a positive effect on the region.**



previously estimated, or sooner. As things continue to evolve and mature in Asia, we'll see shifting ownership and consolidation of smaller parks into larger chains as part of the process.

### **Global context**

Disney Shanghai will be a watershed event. It is expected to do very well and have a positive effect on the region. The Asian market really likes the Disney product. Behind that, Universal Beijing is under construction, and other international brand IPs are looking around very actively in China. Operators, local governments and the IP companies all show definite interest in building branded attractions in a meaningful way, in the largest consumer market in the world.

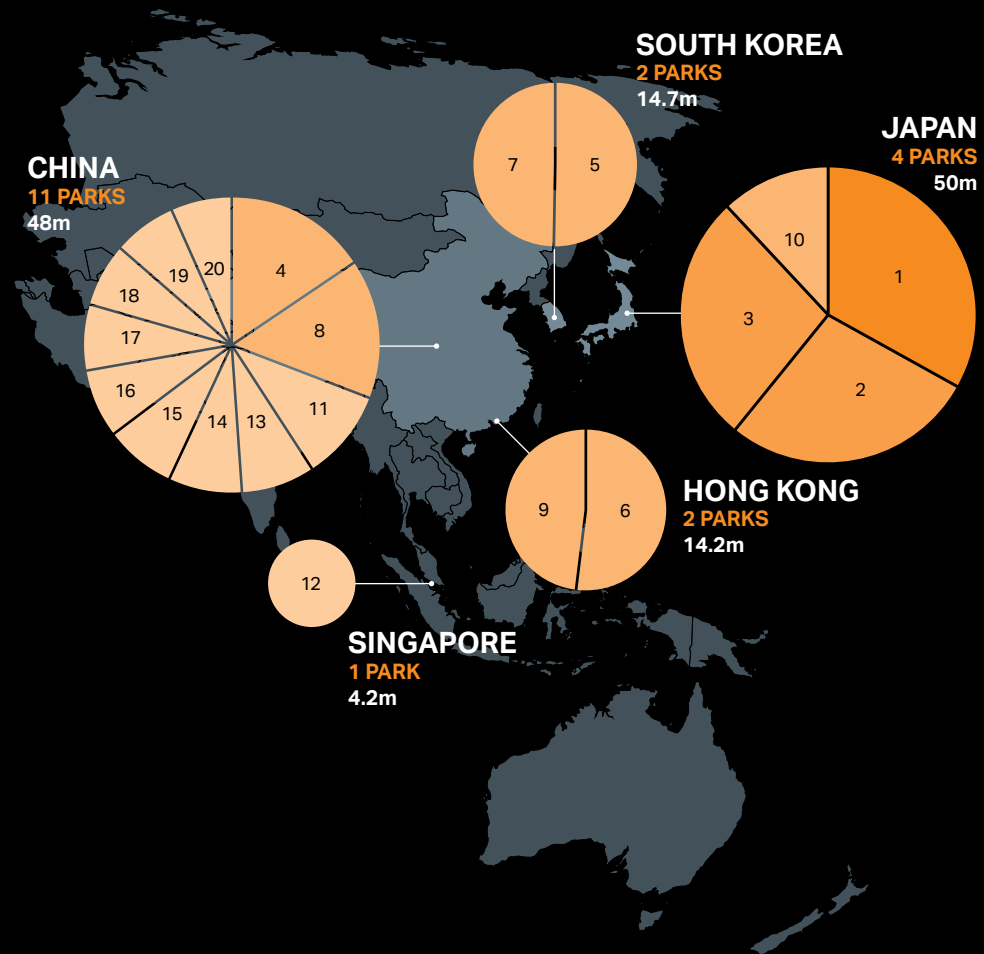
That said, the Chinese government is cautious about having too much Western content, and it will be interesting to see how Eastern projects blend local media, local culture and heritage with Western concepts and Western brands — and how much of that might translate back to attractions in the West. There's certainly room for something of everything in the market, including traditional culture-based attractions and Chinese media-based experiences as well as foreign.

We can see it already happening in the movie industry. Cinema box office revenue in China will pass North American at some point fairly soon, and studios have already been moving to a more international product, or at least a product with Asian elements.

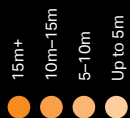
In Southeast Asia, a growing number of large, diversified media companies that are active in TV, broadcasting, gaming and mobile technology are exploring how to move into theme parks and family entertainment centers.

And even though they don't show up in this report, developers in Asia have a lot of interest in indoor entertainment — smaller size facilities of 30,000–50,000 square feet, usually within retail centers. Oriented to children, teens and families visiting for 2–3 hours at a stretch, these facilities represent opportunities for themed entertainment professionals. Shopping malls look to them for differentiation as Asia is moving very quickly to a saturated retail environment. Sometimes there's a cluster of attractions similar to the Merlin Entertainments business model.

# TOP 20 AMUSEMENT/THEME PARKS ASIA-PACIFIC

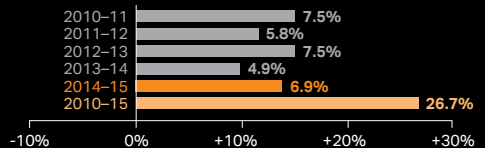


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2010-15





RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	TOKYO DISNEYLAND, Tokyo, Japan	-4.0%	16,600,000	17,300,000
2	UNIVERSAL STUDIOS JAPAN, Osaka, Japan	17.8%	13,900,000	11,800,000
3	TOKYO DISNEY SEA, Tokyo, Japan	-3.5%	13,600,000	14,100,000
4	CHIMELONG OCEAN KINGDOM, Hengqin, China	36.0%	7,486,000	5,504,000
5	EVERLAND, Gyeonggi-Do, South Korea	0.6%	7,423,000	7,381,000
6	OCEAN PARK, Hong Kong SAR	-5.2%	7,387,000	7,792,000
7	LOTTE WORLD, Seoul, South Korea	-3.9%	7,310,000	7,606,000
8	HANGZHOU SONGCHENG PARK, Hangzhou, China	25.5%	7,289,000	5,810,000
9	HONG KONG DISNEYLAND, Hong Kong SAR	-9.3%	6,800,000	7,500,000
10	NAGASHIMA SPA LAND, Kuwana, Japan	4.3%	5,870,000	5,630,000
11	SONGCHENG LIJIANG ROMANCE PARK, Lijiang, China	170.4%	4,678,000	1,730,000
12	UNIVERSAL STUDIOS SINGAPORE, Singapore	9.4%	4,200,000	3,840,000
13	CHANGZHOU DINOSAUR PARK, Changzhou, China	6.8%	3,950,000	3,700,000
14	OCT EAST, Shenzhen, China	4.2%	3,940,000	3,780,000
15	OCT HAPPY VALLEY, Beijing, China	12.0%	3,740,000	3,340,000
16	CHIMELONG PARADISE, Guangzhou, China	8.0%	3,619,000	3,351,000
17	OCT WINDOW OF THE WORLD, Shenzhen, China	-4.4%	3,440,000	3,600,000
18	SONGCHENG SANYA ROMANCE PARK, Sanya, China	72.1%	3,322,000	1,930,000
19	OCT HAPPY VALLEY, Shenzhen, China	-1.5%	3,250,000	3,300,000
20	JIUZHAI SONGCHENG RESORT, Jiuzhaigou, China	67.0%	3,140,000	1,880,000
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>130,944,000</b>	<b>120,874,000</b>
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>6.9%</b>	<b>122,527,000</b>

# 6.9%

Top 20 amusement/theme parks attendance growth Asia-Pacific 2014-15

# 130.9m

Top 20 amusement/theme parks Asia-Pacific attendance 2015

# 122.5m

Top 20 amusement/theme parks Asia-Pacific attendance 2014

# TOP 20 WATER PARKS ASIA-PACIFIC



## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	<b>CHIMELONG WATER PARK</b> , Guangzhou, China	4.1%	2,352,000	2,259,000
2	<b>OCEAN WORLD</b> , Gangwon-Do, South Korea	-5.9%	1,509,000	1,604,000
3	<b>CARIBBEAN BAY</b> , Gyeonggi-Do, South Korea	-4.0%	1,434,000	1,493,000
4	<b>WET 'N' WILD GOLD COAST</b> , Gold Coast, Australia	0.0%	1,200,000	1,200,000
5	<b>SHENYANG ROYAL OCEAN PARK — WATER WORLD</b> , Fushun, China	-1.9%	1,150,000	1,172,000
6	<b>SUNWAY LAGOON</b> , Kuala Lumpur, Malaysia	-2.1%	1,077,000	1,100,000
7	<b>ATLANTIS WATER ADVENTURE</b> , Jakarta, Indonesia	1.0%	970,000	960,000
8	<b>SUMMERLAND</b> , Tokyo, Japan	3.5%	915,000	884,000
9	<b>WOONGJIN PLAYDOCI WATERDOCI</b> , Gyeonggi-Do, South Korea	-5.0%	898,000	945,000
10	<b>SUNWAY LOST WORLD OF TAMBUN</b> , Perak, Malaysia	22.7%	859,000	700,000
11	<b>OCEAN PARK WATER ADVENTURE</b> , Jakarta, Indonesia	3.5%	804,000	777,000
12	<b>LOTTE WATER PARK</b> , Seoul, South Korea (new)	NA	772,000	NA
13	<b>WATER KINGDOM</b> , Mumbai, India	0.0%	750,000	750,000
14	<b>PLAYAMAYA WATER PARK</b> , Wuhan, China	35.2%	730,000	540,000
15	<b>WUHU FANTAWILD WATER PARK</b> , Wuhu, China	129.1%	708,000	309,000
16	<b>LEGOLAND WATER PARK</b> , Johor, Malaysia	11.1%	700,000	630,000
17	<b>ZHENGZHOU FANTAWILD WATER PARK</b> , Zhengzhou, China	215.5%	694,000	220,000
18	<b>CHANGDE HAPPY WATER WORLD</b> , Changde, China (new)	NA	690,000	NA
19	<b>WET 'N' WILD SYDNEY</b> , Sydney, Australia	-4.9%	675,000	710,000
20	<b>ADVENTURE COVE WATER PARK</b> , Singapore	7.5%	660,000	614,000
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>19,547,000</b>	<b>16,867,000</b>
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>1.0%</b>	<b>19,362,000</b>

# 1.0%

Top 20 water parks attendance growth Asia-Pacific 2014–15

# 19.5m

Top 20 water parks Asia-Pacific attendance 2015

# 19.4m

Top 20 water parks Asia-Pacific attendance 2014

# EMEA



**2.8%**

Top 20 amusement/theme parks  
attendance growth EMEA 2014–15

**61.2m**

Top 20 amusement/theme parks  
EMEA attendance 2015

**9.0m**

Top 10 water parks EMEA  
attendance 2015



**Margreet Papamichael**  
Director, EMEA

## EMEA's ups and downs

### Northern Europe outperforms Southern Europe

Overall the theme park and water park attendance numbers for 2015 in the EMEA region (Europe, Middle East and Africa) show quite a bit of growth, but a somewhat bumpy ride. In Europe particularly, some of the top parks did tremendously well while others just doodled by.

Euro Disney's numbers have been back on the upswing for two reasons: France as a whole is doing better economically, and Disney has made significant investments including new attractions themed on top IPs Star Wars and Frozen, as well as general improvements in the park.

Europa-Park in Rust, Germany, is consistently in the top 5 for attendance, as it was for 2015. This family-owned park does really well, going from strength to strength. In marking its 40th anniversary in 2015 Europa-Park brought in a 10% increase, which is huge. The park recently increased its accommodation offerings and benefited from that as well. Over the course of the last 10 years, this park has grown with a compound annual growth rate of around 3.4%, which shows great consistency.

Similarly, de Efteling in the Netherlands, another family-owned park, has shown consistent growth through the cycles with a very similar compound annual growth rate of around 3.9%. The park has recently announced both new attractions and additional accommodation, which may well see it increase its growth rate.

Other increases can mostly be credited to the market picking up and doing well, with Southern Europe slightly behind Northern Europe, a pattern we noted in 2014 as well.

### 10-year review, EMEA's top parks

<b>PARK</b> Location	<b>% CHANGE</b> <b>2005-2015</b>	<b>ATTENDANCE</b> <b>2015</b>	<b>ATTENDANCE</b> <b>2010</b>	<b>ATTENDANCE</b> <b>2005</b>
<b>DISNEYLAND PARK AT DISNEYLAND PARIS,</b> Marne-la-Vallée, France	0.2%	10,360,000	10,500,000	10,200,000
<b>EUROPA-PARK,</b> Rust, Germany	3.4%	5,500,000	4,250,000	3,950,000
<b>TIVOLI GARDENS,</b> Copenhagen, Denmark	1.2%	4,733,000	3,696,000	4,188,000
<b>DE EFTELING,</b> Kaatsheuvel, The Netherlands	3.9%	4,680,000	4,000,000	3,200,000
<b>WALT DISNEY STUDIOS PARK AT</b> <b>DISNEYLAND PARIS,</b> Marne-la-Vallée, France	7.8%	4,440,000	4,500,000	2,100,000
<b>PORT AVENTURA,</b> Salou, Spain	0.7%	3,600,000	3,050,000	3,366,000
<b>LISEBERG,</b> Gothenburg, Sweden	-0.2%	3,100,000	2,900,000	3,150,000
<b>GARDALAND,</b> Castelnuovo del Garda, Italy	-0.8%	2,850,000	2,800,000	3,100,000
<b>LEGOLAND WINDSOR,</b> Windsor, U.K.	4.9%	2,250,000	1,900,000	1,400,000
<b>ALTON TOWERS,</b> Staffordshire, U.K.	-1.3%	1,925,000	2,750,000	2,200,000
<b>LEGOLAND BILLUND,</b> Billund, Denmark	3.2%	2,050,000	1,650,000	1,490,000
<b>PUY DU FOU,</b> Les Epesses, France	8.7%	2,050,000	1,350,000	890,000
<b>THORPE PARK,</b> Chertsey, England	2.8%	1,850,000	1,850,000	1,400,000
<b>PHANTASIALAND,</b> Brühl, Germany	-0.5%	1,900,000	1,850,000	2,000,000
<b>PARC ASTERIX,</b> Plailly, France	0.3%	1,850,000	1,663,000	1,800,000
<b>FUTUROSCOPE,</b> Jaunay-Clan, France	2.5%	1,800,000	1,825,000	1,400,000
<b>PARQUE WARNER,</b> Madrid, Spain	5.1%	1,641,000	1,193,000	1,000,000
<b>CHESSINGTON WORLD OF ADVENTURES,</b> Chessington, U.K.	4.5%	1,640,000	1,200,000	1,054,000
<b>HEIDE PARK,</b> Soltau, Germany	2.3%	1,525,000	1,350,000	1,220,000
<b>GRONALUND,</b> Stockholm, Sweden	3.9%	1,461,087	1,305,612	1,000,000
<b>TOTAL</b>	<b>2.0%</b>	<b>61,205,087</b>	<b>55,582,612</b>	<b>50,108,000</b>



“

**De Efteling in the Netherlands has shown consistent growth through the cycles with a compound annual growth rate of around 3.9%.**

”

**The power of live shows and fun — the IP question**

Puy du Fou in Les Epesses, France, has steadily increased growth over the past five years regardless of external economics, showing us all what you can do with a park based on live shows. The park is highly seasonal, really creative, and it gets people stirred up emotionally. It depends on destination tourism as there is not much population within a 1-hour or even a 2-hour

radius. We were absolutely delighted to see Puy du Fou receive its second Thea Award, in 2016, from the Themed Entertainment Association, celebrating the new attraction Les Amoureux de Verdun. It was well deserved for this very original and creative attraction, where instead of delivering a performance on a stage, the guest walks through the staged, multimedia environment and experiences it directly. (Puy du Fou was honored with the Thea Classic Award in 2012.)

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In Poitiers, France, Futuroscope's impressive 8% attendance increase for 2015 outperformed French theme park numbers as a whole, which is a tribute to way they've been changing the park to offer a lot more fun, with attractions such as the Time Machine, an irreverent, whimsical "Raving Rabbid" experience created in partnership with Ubisoft and honored last year with a TEA Thea Award. Futuroscope is not just delivering the fun, they are also being vocal about it in their marketing.

The success of Time Machine, not to mention what's happening with theme park development in many parts of the world, raises the question of IP. Yes, IP providers are looking at the European market, but

I am cautious when talking to my clients about the use of IP. Europe's theme parks have many examples of success that don't depend on licensed IP. Look at Europa-Park, Tivoli and Efteling. They are all in the top 5, and they all emphasize home grown IPs that are relevant to their market. These parks have made their content and theming relevant to their regional markets without the cost of a global IP.

To IP, or not to IP, depends on your target market. For example, a destination like Dubai, wanting to attract tourism from all over the globe, will need IP and content relevant to a much wider audience, which thus leads very quickly to the use of a globally recognized IP.

“

**Europe's theme parks have many examples of success that don't depend on licensed IP.** ”

Tivoli Gardens, Copenhagen, Denmark







## Adding a second gate or a second type of experience in this way encourages longer stays and attendance tends to go up. ”

### Alternative programming, second gates and facing facts

In the U.K., Alton Towers experienced a dramatic attendance decline due to a truly tragic accident at the start of the season. The park and its parent company Merlin Entertainments dealt with it in a straightforward and exemplary fashion: they immediately closed down the park, secured everything and reviewed their procedures — not just at Alton Towers but in all their parks — to make sure something like that could never happen again. Numbers at Thorpe Park, also owned by Merlin, were also affected.

In Stockholm, Gröna Lund came in at #20 in the top attended EMEA parks of 2015. Their success story is an interesting lesson in alternative, soft programming, as they cite their evening concert program for the 11% growth. These are massive, big-name concerts that are hosted in the park. The

park also reported record sales in annual passes for the year, and for pass holders, the concert tickets were included. It's a clever use of a park's available space and its seasonal opportunities.

In Spain, Parque Warner Madrid posted a very impressive 12% growth figure for 2015, crediting Parque Warner Beach, the water park added in 2014, for boosting the theme park numbers. Adding a second gate or a second type of experience in this way encourages longer stays and attendance tends to go up. It's a popular move for developers and operators. The property becomes a true destination. Spain is beginning to emerge from its economic woes and we are looking forward to seeing more signs of improvement there. The increase in tourism to Spain for 2015 may also be partly attributable to changing travel patterns due to security concerns in other parts of the world such as Turkey and Tunisia.

**11.4%**

Gröna Lund, Sweden,  
attendance growth 2014–15

**12.4%**

Parque Warner, Spain,  
attendance growth 2014–15

**-25.2%**

Alton Towers, U.K.,  
attendance growth 2014–15



© Aquaventure Water Park, Dubai, U.A.E.

### Water parks indoor and outdoor

This is the second year that we have included a Top 10 for water parks of the EMEA region. We are grateful to those water parks that have provided us with their insights — and we also note that there may well be gems of water parks that have yet to come to our attention.

European water parks come in two basic forms: indoor facilities that operate year round and may have some outdoor components, and outdoor facilities that are usually seasonal. Northern Europe, for obvious reasons of climate, tends to have indoor facilities. Of these, we find the most successful ones are usually in locations where there is a strong cultural connection to water-based health therapies, and the water parks there usually have spa components as well. This is the case for Therme Erding, Aquapalace and Nettebad.

Most of the other successful water parks are outdoors, in locations with conducive weather: the Middle East and to some degree Southern Europe. Hospitality is often part of the overall complex, such as Aquaventure and Wild Wadi.

The water parks in the Middle East are showing water rides that are not just slides, but distinctly 'theme park'-ish rides. This seems of interest to other operators within Europe; however, at the moment they seem still only to occur in the Middle Eastern market. It would be great to see some European operators take the creative plunge.

### Middle East — the Dubai effect

While we await the 2016 openings of IMG Worlds of Adventure and Dubai Parks & Resorts, and other new parks and attractions also set to open their gates

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in the near future, there isn't a lot of news to report in terms of attendance growth for theme parks in the Middle East region.

Much of what is happening in this region isn't yet showing up on our charts of the top performers. It's a unique region with a unique business model that hasn't fully proved itself — yet — but is definitely something to watch with great attention in our industry.

Generally, people will travel up to two hours to visit a regional park — but in the Middle East, we are looking at a place that is first and foremost a destination — where the bulk of park visitors will be tourists. The questions are how far that assumption will hold and how much the Middle East can

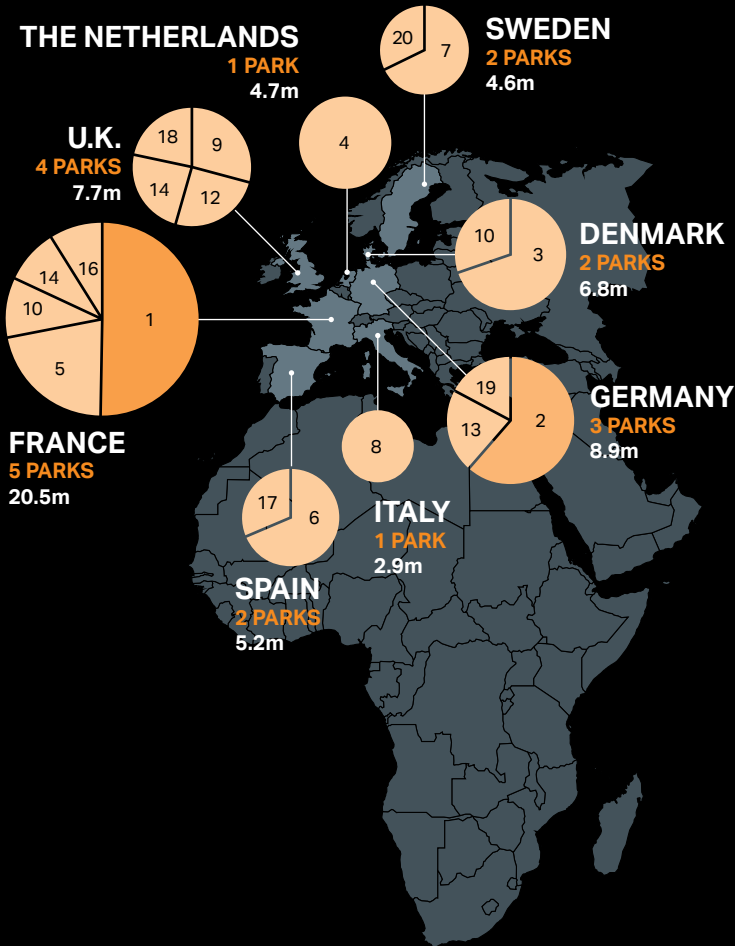
sustain it — and what the learning curve will be for everyone in the industry.

Theme parks will form an important aspect to the mix of land uses developers in the Middle East are putting together; the question is how much additional tourism that will generate. The expectations that are being announced in regard to future numbers of visitors there are very high. But we have been surprised by the Middle East already — for instance, by retail performance. What looked to the advisory profession to be an already oversaturated retail market turned out to be well able to add another successful shopping mall. The Dubai effect does exist! We are looking forward to being surprised again.

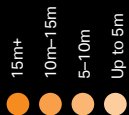
© Tropical Islands, Krausnick, Germany



# TOP 20 AMUSEMENT/THEME PARKS EMEA

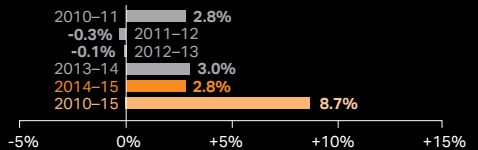


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2010-15



RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	<b>DISNEYLAND PARK AT DISNEYLAND PARIS,</b> Marne-la-Vallée, France	4.2%	10,360,000	9,940,000
2	<b>EUROPA-PARK,</b> Rust, Germany	10.0%	5,500,000	5,000,000
3	<b>TIVOLI GARDENS,</b> Copenhagen, Denmark	5.7%	4,733,000	4,478,000
4	<b>DE EFTELING,</b> Kaatsheuvel, The Netherlands	6.4%	4,680,000	4,400,000
5	<b>WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS,</b> Marne-la-Vallée, France	4.2%	4,440,000	4,260,000
6	<b>PORT AVENTURA,</b> Salou, Spain	2.9%	3,600,000	3,500,000
7	<b>LISEBERG,</b> Gothenburg, Sweden	0.0%	3,100,000	3,100,000
8	<b>GARDALAND,</b> Castelnovo del Garda, Italy	3.6%	2,850,000	2,750,000
9	<b>LEGOLAND WINDSOR,</b> Windsor, U.K.	2.3%	2,250,000	2,200,000
10	<b>LEGOLAND BILLUND,</b> Billund, Denmark	6.5%	2,050,000	1,925,000
	<b>PUY DU FOU,</b> Les Epees, France	7.2%	2,050,000	1,912,000
12	<b>ALTON TOWERS,</b> Staffordshire, U.K.	-25.2%	1,925,000	2,575,000
13	<b>PHANTASIALAND,</b> Brühl, Germany	3.0%	1,900,000	1,845,000
14	<b>PARC ASTERIX,</b> Plailly, France	2.8%	1,850,000	1,800,000
	<b>THORPE PARK,</b> Chertsey, U.K.	-11.9%	1,850,000	2,100,000
16	<b>FUTUROSCOPE,</b> Jaunay-Clan, France	8.1%	1,800,000	1,665,000
17	<b>PARQUE WARNER,</b> Madrid, Spain	12.4%	1,641,000	1,460,000
18	<b>CHESSINGTON WORLD OF ADVENTURES,</b> Chessington, U.K.	2.5%	1,640,000	1,600,000
19	<b>HEIDE PARK,</b> Soltau, Germany	3.4%	1,525,000	1,475,000
20	<b>GRÖNA LUND,</b> Stockholm, Sweden	11.4%	1,461,000	1,311,000
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>61,205,000</b>	<b>59,296,000</b>
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>2.8%</b>	<b>59,535,000</b>

# 2.8%

Top 20 amusement/theme parks attendance growth EMEA 2014-15

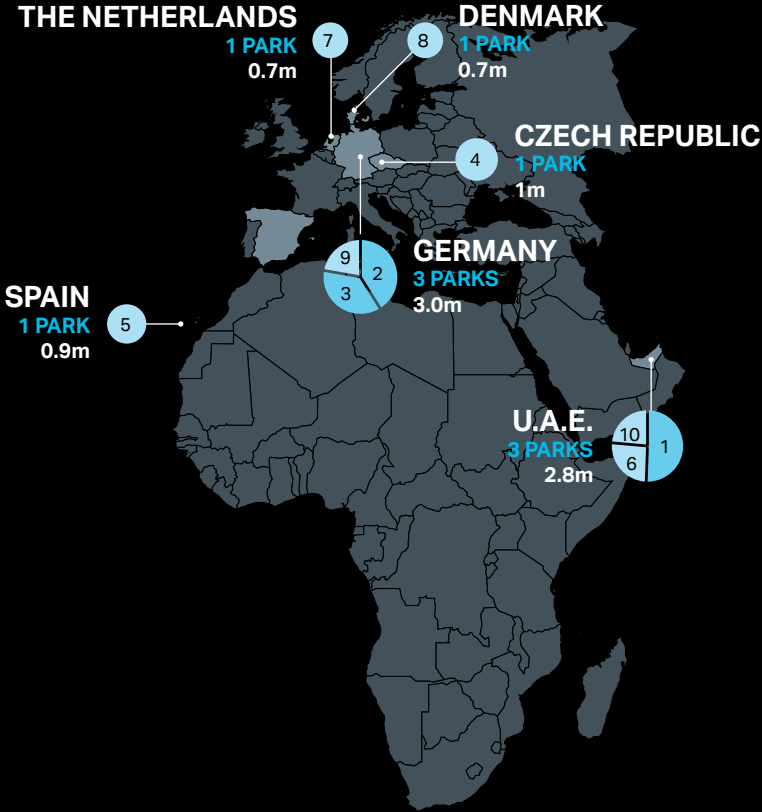
# 61.2m

Top 20 amusement/theme parks EMEA attendance 2015

# 59.5m

Top 20 amusement/theme parks EMEA attendance 2014

# TOP 10 WATER PARKS EMEA



## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

RANK	PARK Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014
1	<b>AQUAVENTURE WATER PARK</b> , Dubai, U.A.E.	0.0%	1,400,000	1,400,000
2	<b>THERME ERDING</b> , Erding, Germany	23.5%	1,235,000	1,000,000
3	<b>TROPICAL ISLANDS</b> , Krausnick, Germany	10.0%	1,100,000	1,000,000
4	<b>AQUAPALACE</b> , Prague, Czech Republic	18.0%	997,000	845,000
5	<b>SIAM PARK</b> , Santa Cruz de Tenerife, Spain	1.8%	865,000	850,000
6	<b>WILD WADI</b> , Dubai, U.A.E.	-1.4%	715,000	725,000
7	<b>TIKI POOL</b> , Duinrell, The Netherlands	0.0%	700,000	700,000
8	<b>LALANDIA</b> , Billund, Denmark	0.0%	680,000	680,000
9	<b>NETTEBAD</b> , Osnabrück, Germany	-0.2%	659,000	660,000
10	<b>YAS WATERWORLD</b> , Abu Dhabi, U.A.E.	-3.7%	650,000	675,000
<b>TOP 10 TOTAL ATTENDANCE 2015</b>			<b>9,001,000</b>	<b>8,535,000</b>
<b>TOP 10 TOTAL ATTENDANCE 2014</b>		<b>5.5%</b>	<b>8,535,000</b>	

# 5.5%

Top 10 water parks attendance growth EMEA 2014–15


# 9.0m

Top 10 water parks EMEA attendance 2015

# 8.5m

Top 10 water parks EMEA attendance 2014

# MUSEUMS



**57.5m**

Top 20 museums North  
America attendance 2015

**57.6m**

Top 20 museums Asia-Pacific  
attendance 2015

**74.1m**

Top 20 museums EMEA  
attendance 2015





**Linda Cheu**  
Vice President  
with contributions by  
**Beth Chang**, Vice President,  
Economics, Asia-Pacific;  
and **Margreet Papamichael**  
Director, EMEA

## Museums in transition

Looking at the top-attended museums worldwide in 2015, the first five on the list are exactly the same as in 2014. Museums on the rest of the list have reshuffled, but there has not been a massive change.

Museums are a decentralized industry in comparison to theme parks. Unlike theme parks, museums aren't dominated by a relatively small number of top operators and brands. On the other hand, just as with theme parks and water parks, the top performers tend to stay on top and to continue growing. This is the fourth year we have been tracking the performance of museums in the Museum Index, and once we have five years of data we'll understand patterns of growth and be able to identify trends.

Museums are mission-driven organizations and beacons of culture, arts, history, science, education, and entertainment. But they serve a changed and changing world. How are they adapting and continuing to drive attendance in that world? How do they adapt while remaining true to their missions?

The democratization of technology has led to a prevalence of entertainment and information available in people's homes. Having vast amounts of entertainment and information available electronically at a touch are things Millennials and today's children take for granted.



## Europe and North America are stable, mature markets, and museum attendance there tends to be driven by popular exhibits. ”

This will continue to challenge the demand for traditional museums and people's expectations for visitor experience. The guest experience in museums is continuing to move away from, or to augment, traditional exhibits and object based experiences. Museums are also increasingly acting as community gathering places, creating social experiences to draw visitors to their exhibits and programming.

Europe and North America are stable, mature markets, and fluctuations in museum attendance in these markets tend to be driven by popular temporary exhibits. Earned revenue is increasingly important to the U.S. markets, followed by the European markets, as they cope with declines in government funding.

Even art and history museums are embracing technology and learning to position themselves more as attractions, competing for people's discretionary time and money and finding new ways to explore their collections and bring them to life. For example, the British Museum found that VR and AR technology were just the thing to make its Bronze Age exhibit more engaging than ever, and that younger visitors embraced it without hesitation.

In Asia, especially China, the museum sector is volatile and growing rapidly — similar to the theme park sector in that part of the world. We can expect the global top 20 to remain fairly stable for the next five years or so, but over the longer term, China's museum building boom may start to become visible on our charts.



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## Focus on Europe

Attendance ups and downs at Europe's top museums are almost invariably tied to the presence or absence of big, popular exhibitions or major events occurring in their host markets.

An exception to this is the Auschwitz Museum in Poland which attracted record attendance in 2015, because the year marked the 70th anniversary of the liberation of the concentration camps in Europe at the end of World War II.

In Amsterdam, work on the museums around Museum Square has been very successful. This year the Van Gogh Museum increased attendance by 18% after reopening following a major refurbishment, with a new exhibition and a critically acclaimed new entry hall. This followed the re-opening of the Rijksmuseum.

The Museo Nacional Centro de Arte Reina Sofía in Madrid enjoyed a major 21% attendance jump in 2015 due to the popularity of its exhibition, "White Fire: Collectionism and Modernity", which drew 540,000 visits.

The Louvre maintained its position as the top-attended museum in the world, even though visitation there, and to Paris generally, was negatively affected by the high profile terrorist attack.

In the U.K., the Tate Modern had its lowest attendance in 10 years. Its sharp contrast to prior year attendance was in part due to the all-time high in 2014 for



the exhibition, "Henri Matisse: The Cut Outs," and exacerbated by widespread closures at the Southbank Centre next door, a multi-purpose performing arts center that people often visit in combination with the Tate. Meanwhile, the Victoria & Albert Museum saw a dramatic rise in attendance due to its most popular exhibition ever, "Savage Beauty: Alexander McQueen" (which was honored this year with a TEA Thea Award).

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## Focus on North America

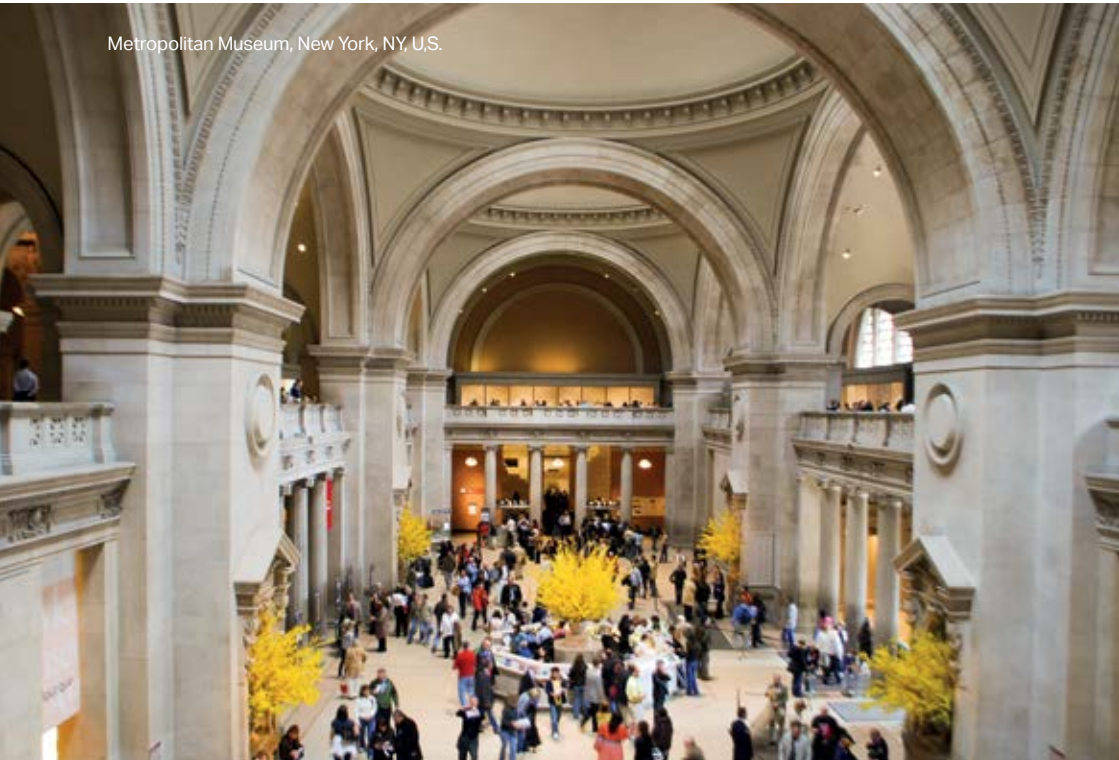
Science centers have generally been the museums that pushed the envelope in terms of technology. But as mentioned above, the increased acceptance of technology, plus its affordability trickling down from investments in the gaming industry along with the need to be competitive, has led to its adoption by other types of institutions as well.

In the U.S. we're seeing some very creative and effective applications, such as the "Dreams of Dali" exhibit at the Dali Museum which used virtual reality to supplement its more traditional galleries, and the "Rain Room" which made stops at some top venues such as LACMA and MOMA.

Technology also can facilitate networked experiences that make museum collections and exhibitions accessible from afar. For instance, Google Cardboard was used by the American Museum of Natural History, in a program tied to Google Expeditions that enables students in other locations to remotely tour the museum's Hall of Mammals.

Digital technology isn't only being used to explore art — it is a medium in itself, and can be a very engaging and interactive one for all ages. These trends are connected to the proliferation of Maker spaces; basically something that was pioneered at science centers such as the Exploratorium for years and has now taken off and led to the emergence of franchise type outlets supported by individual memberships,

Metropolitan Museum, New York, NY, U.S.





corporate sponsorship and partnerships with universities much in the manner of museums. The Arizona Science Center, for example, has a full-scale, 6,500 square foot maker workshop called Create, with separate admission, annual monthly membership options, art supplies, 3-D printers and tools.

Adult events are a very significant trend that can account for up to 10% to 15% of total attendance at some museums in the U.S. In the past these have been seen as ancillary but now they have become core programming, an integral part of attendance and a valuable stream of earned revenue — expanding the museum’s hours, the guest experience and the audiences. These events typically include access

to all the galleries, displays and exhibits just as in daytime hours, complete with resident experts and docents to talk to, but enhanced with entertainment, refreshment, music, special activities.

Examples include the weekly Nightlife gatherings at the California Academy of Sciences in San Francisco; Adult Sleepovers at AMNH in New York City, Cheap Date Night at the McDonnell Planetarium in Saint Louis, Adults Only Night at TELUS Spark in Calgary, Canada; Audubon Institute’s Summer of Sustainability Seafood Dinner Series in New Orleans.

Bottom line: What it means to visit a museum is changing.

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## Focus on Asia-Pacific

In China, private sector developers are establishing museums, then handing them to the government in exchange for getting prime land. While these may be world-class structures, they tend to be deficient in other areas: collections, content and operating budgets. It remains to be seen how they will fare over the next 10 to 20 years as the sector is still on a learning curve in terms of operations skills, budgeting, staffing, marketing, exhibit design and guest experience.

As members of Asia's expanding upper middle class travel and visit overseas museums, their expectations have been changing. This has put pressure on their local museums to grow and improve. Renovations are taking place mostly in the larger institutions and those that are privately owned; smaller museums may find it harder to keep up.

National policy has dictated that education and research should be the top priority for museums, where previously emphasis was placed on the collection. This policy change should lead to increased demand for exhibit content, making museums more visitor-oriented. New government requirements about education and class time are engendering field trips. This trend will lead to more of the kind of partnerships between museums and educators that are typical in the West.

Asian museums do not receive much support from private foundations and donations, but there are signs of change. In Beijing, the China Women's Federation, a nonprofit organization, opened China's first-ever corporate sponsored children's discovery center. We are seeing more interest in building such centers now, in a country that traditionally has almost no children's museums.



Shanghai Science & Technology Museum,  
Shanghai, China



National Museum of China, Beijing, China

National Art Center, Tokyo, Japan



Tokyo National Museum, Tokyo, Japan



National Palace Museum, Taipei, Taiwan



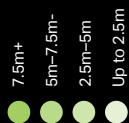
While the number of private museums in China continues to increase, the Chinese government has been altering its official definition of “museum” and leaving the private institutions without this designation. It will be interesting to see how this affects the sector. This move would have some connection to other recent government goals for museums in China. Free admission for all is one such goal, but museums retain some degree of freedom in this regard. The more modern science museums tend to charge admission. Large, provincial museums, which usually have collections of ancient relics, are usually free.

Looking at the numbers, the Shanghai Science Museum’s 41% attendance increase for 2015 was likely due to consolidation: one large museum and several small ones were combined. As in Europe and the Americas, as special exhibits come and go, so does attendance rise and fall, and this would be the reason for the decline in visitation at the Hong Kong Science Museum.

# TOP 20 MUSEUMS NORTH AMERICA

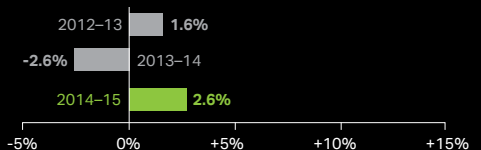


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2012-15





RANK	MUSEUM Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014	FREE/PAID
1	NATIONAL MUSEUM OF NATURAL HISTORY, Washington, DC	-5.5%	6,900,000	7,300,000	Free
	NATIONAL AIR AND SPACE MUSEUM , Washington, DC	3.0%	6,900,000	6,700,000	Free
3	THE METROPOLITAN MUSEUM OF ART, New York, NY	1.6%	6,300,000	6,200,000	Paid
4	AMERICAN MUSEUM OF NATURAL HISTORY, New York, NY	0.0%	5,000,000	5,000,000	Paid
5	NATIONAL GALLERY OF ART, Washington, DC	5.4%	4,104,000	3,892,000	Free
6	NATIONAL MUSEUM OF AMERICAN HISTORY, Washington, DC	2.5%	4,100,000	4,000,000	Free
7	THE MUSEUM OF MODERN ART, New York, NY	-0.3%	3,010,000	3,020,000	Paid
8	CALIFORNIA SCIENCE CENTER, Los Angeles, CA	0.0%	2,630,000	2,630,000	Free
9	HOUSTON MUSEUM OF NATURAL SCIENCE, Houston, TX	-3.2%	2,295,000	2,372,000	Paid
10	DENVER MUSEUM OF NATURE & SCIENCE, Denver, CO	18.9%	1,700,000	1,430,000	Paid
11	UDVAR-HAZY CENTER, Washington, DC	23.1%	1,600,000	1,300,000	Free
	U.S. HOLOCAUST MEMORIAL MUSEUM, Washington, DC	2.3%	1,600,000	1,564,000	Paid
13	THE J. PAUL GETTY CENTER , Los Angeles, CA	9.6%	1,580,000	1,441,000	Free
14	THE ART INSTITUTE OF CHICAGO, Chicago, IL	10.7%	1,550,000	1,400,000	Paid
15	MUSEUM OF SCIENCE AND INDUSTRY, Chicago, IL	7.1%	1,500,000	1,400,000	Paid
16	CALIFORNIA ACADEMY OF SCIENCES, San Francisco, CA	0.0%	1,400,000	1,400,000	Paid
17	FIELD MUSEUM OF NATURAL HISTORY, Chicago, IL	12.4%	1,382,000	1,229,000	Paid
18	MUSEUM OF SCIENCE , Boston, MA	-4.6%	1,380,000	1,446,000	Paid
19	DONALD W. REYNOLDS CENTER FOR AMERICAN ART AND PORTRAITURE, Washington, DC	18.2%	1,300,000	1,100,000	Free
20	THE CHILDREN'S MUSEUM OF INDIANAPOLIS, Indianapolis, IN	3.3%	1,250,000	1,210,000	Paid
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>57,481,000</b>	<b>56,034,000</b>	
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>2.6%</b>	<b>53,514,000</b>	

# 2.6%

Top 20 museums attendance growth North America 2014–15

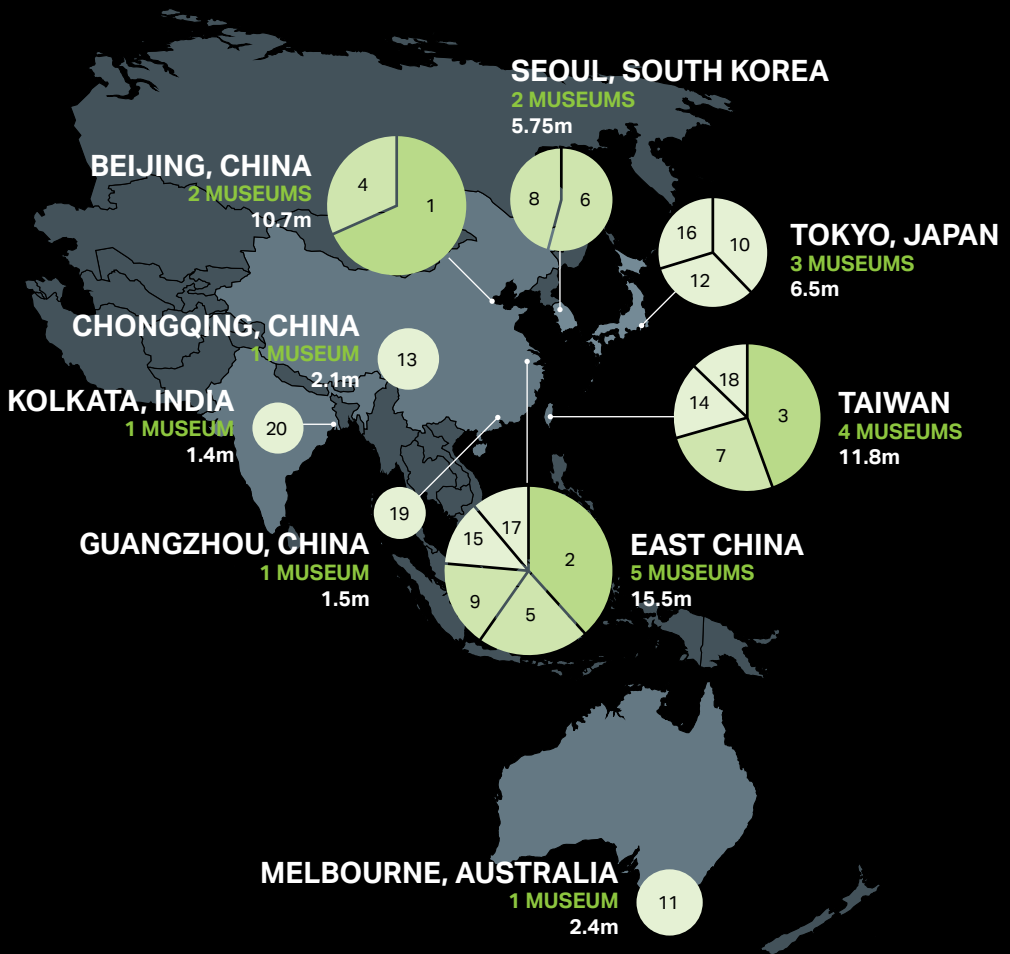
# 57.5m

Top 20 museums North America attendance 2015

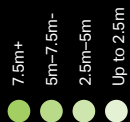
# 56m

Top 20 museums North America attendance 2014

# TOP 20 MUSEUMS ASIA-PACIFIC

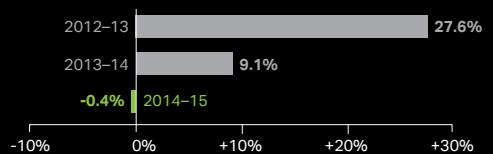


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2012-15



RANK	MUSEUM Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014	FREE/PAID
1	NATIONAL MUSEUM OF CHINA, Beijing, China	-4.5%	7,290,000	7,630,000	Free
2	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, Shanghai, China	40.9%	5,948,000	4,220,000	Paid
3	NATIONAL PALACE MUSEUM (TAIWAN), Taipei, Taiwan	-2.1%	5,288,000	5,402,000	Paid
4	CHINA SCIENCE TECHNOLOGY MUSEUM, Beijing, China	4.4%	3,360,000	3,218,000	Paid
5	ZHEJIANG MUSEUM, Hangzhou, China	10.4%	3,338,000	3,023,000	Free
6	NATIONAL MUSEUM OF KOREA, Seoul, South Korea	-11.5%	3,130,000	3,537,000	Free
7	NATIONAL MUSEUM OF NATURAL SCIENCE, Taichung, Taiwan	5.1%	3,075,000	2,927,000	Paid
8	NATIONAL FOLK MUSEUM OF KOREA, Seoul, South Korea	-19.9%	2,620,000	3,271,000	Free
9	NANJING MUSEUM, Nanjing, China	9.4%	2,582,000	2,360,000	Free
10	NATIONAL ART CENTER, Tokyo, Japan	3.4%	2,466,000	2,384,000	Paid
11	NATIONAL GALLERY OF VICTORIA, Melbourne, Australia	18.5%	2,411,000	2,035,000	Free
12	NATIONAL MUSEUM OF NATURE AND SCIENCE, Tokyo, Japan	18.2%	2,100,000	1,777,000	Paid
13	CHINA THREE GORGES MUSEUM (CHONGQING MUSEUM), Chongqing, China	22.4%	2,081,000	1,700,000	Free
14	NATIONAL SCIENCE & TECHNOLOGY MUSEUM, Kaohsiung, Taiwan	1.2%	1,958,000	1,934,000	Paid
15	SHANGHAI MUSEUM, Shanghai, China	-3.8%	1,924,000	2,001,000	Free
16	TOKYO NATIONAL MUSEUM, Tokyo, Japan	0.0%	1,915,000	1,915,000	Paid
17	SUZHOU MUSEUM, Suzhou, China	14.1%	1,690,000	1,481,000	Free
18	NATIONAL TAIWAN MUSEUM OF FINE ARTS, Taipei, Taiwan	20.9%	1,509,000	1,248,000	Free
19	GUANGDONG PROVINCE MUSEUM, Guangzhou, China	9.6%	1,489,000	1,358,000	Free
20	SCIENCE CITY, Kolkata, India	-0.7%	1,441,000	1,451,000	Paid
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>57,615,000</b>	<b>54,872,000</b>	
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>-0.4%</b>	<b>57,832,000</b>	

# -0.4%

Top 20 museums attendance growth Asia-Pacific 2014-15

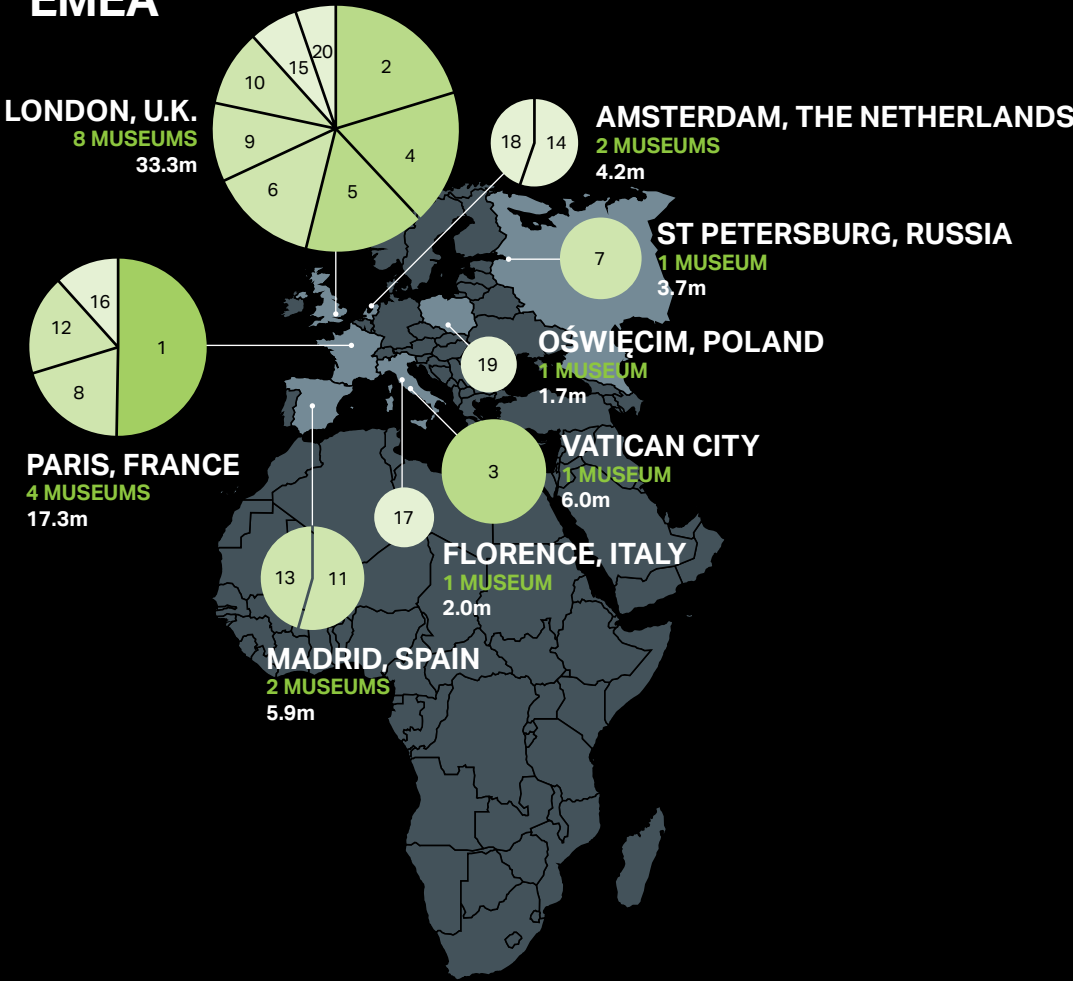
# 57.6m

Top 20 museums Asia-Pacific attendance 2015

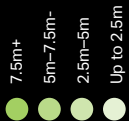
# 57.8m

Top 20 museums Asia-Pacific attendance 2014

# TOP 20 MUSEUMS EMEA

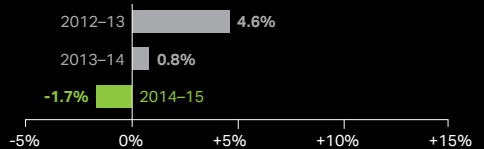


## Key



Circles represent size of attendance at ranked parks in the geography indicated. Slices within circles represent proportion of attendance in the geography from the ranked park indicated by number. Shading indicates attendance at the ranked park versus all other ranked parks.

## Growth 2012-15



RANK	MUSEUM Location	% CHANGE	ATTENDANCE 2015	ATTENDANCE 2014	FREE/PAID
1	LOUVRE, Paris, France	-6.5%	8,700,000	9,300,000	Paid
2	BRITISH MUSEUM, London, U.K.	1.9%	6,821,000	6,695,000	Free
3	VATICAN MUSEUMS, Vatican, Vatican City	-2.8%	6,002,000	6,177,000	Paid
4	NATIONAL GALLERY, London, U.K.	-7.9%	5,908,000	6,417,000	Free
5	NATURAL HISTORY MUSEUM, London, U.K.	-1.9%	5,284,000	5,388,000	Free
6	TATE MODERN, London, U.K.	-18.5%	4,713,000	5,785,000	Free
7	STATE HERMITAGE, St Petersburg, Russia	12.9%	3,668,000	3,248,000	Paid
8	MUSÉE D'ORSAY, Paris, France	-1.2%	3,440,000	3,481,000	Paid
9	VICTORIA & ALBERT MUSEUM, London, U.K.	7.9%	3,432,000	3,180,000	Free
10	SCIENCE MUSEUM (SOUTH KENSINGTON), London, U.K.	0.0%	3,356,000	3,356,000	Free
11	REINA SOFÍA, Madrid, Spain	21.5%	3,250,000	2,674,000	Paid
12	CENTRE POMPIDOU, Paris, France	-10.0%	3,105,000	3,450,000	Paid
13	MUSEO NACIONAL DEL PRADO, Madrid, Spain	6.3%	2,697,000	2,537,000	Paid
14	RIJKSMUSEUM, Amsterdam, The Netherlands	-4.1%	2,350,000	2,450,000	Paid
15	NATIONAL PORTRAIT GALLERY, London, U.K.	4.0%	2,145,000	2,063,000	Free
16	CITE DES SCIENCES ET DE L'INDUSTRIE, Paris, France	-24.7%	2,013,000	2,674,000	Paid
17	GALLERIA DEGLI UFFIZI, Florence, Italy	1.8%	1,972,000	1,936,000	Paid
18	VAN GOGH MUSEUM, Amsterdam, The Netherlands	18.0%	1,888,000	1,600,000	Paid
19	AUSCHWITZ-BIRKENAU MUSEUM, Oświęcim, Poland	12.4%	1,720,000	1,530,000	Paid
20	NATIONAL MARITIME MUSEUM, London, U.K.	10.6%	1,676,000	1,516,000	Free
<b>TOP 20 TOTAL ATTENDANCE 2015</b>			<b>74,140,000</b>	<b>75,457,000</b>	
<b>TOP 20 TOTAL ATTENDANCE 2014</b>			<b>-1.7%</b>	<b>75,410,900</b>	

# -1.7%

Top 20 museums attendance  
growth EMEA 2014–15

# 74.1m

Top 20 museums EMEA  
attendance 2015

# 75.4m

Top 20 museums EMEA  
attendance 2014

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# ABOUT THIS STUDY

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

This is the tenth annual Theme Index and Museum Index collaboration between the Themed Entertainment Association (TEA) and AECOM, although the study itself has been in existence for much longer. The report has evolved over the years, starting as just a report on major U.S. theme parks, with additional regions (EMEA, Asia, Latin America) and attraction types (water parks, museums) added over time. It is of course a significant effort to prepare now, with 190 attractions included in the report, and many more tracked annually.

Inclusion in the annual Theme Index and Museum Index is now seen as a benchmark of success among operators, parks, and museums. Every year AECOM hears from parks and museums desiring to share their attendance increases and earn a place on the list. Those who believe their properties should be included in the report 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, local tourism organizations, and professional estimates where necessary.

The global market is studied as a whole, and each of its main regions is also studied separately: the Americas, EMEA, and Asia.

For a theme park or water park to be included in the report, at a minimum the property must be gated (entry ticket required) and the park generally must be focused on the visitor experience. To be included on the top chains list, a chain operator must have theme parks in its portfolio.

## Frequently Asked Questions

### Why should parks share their numbers?

When operators share their information it is good for the industry. It ties directly into re-investing wisely in ways that bring in more attendance and more repeat visitation, driving revenue and profits. Tracking differences and fluctuations in attendance helps the industry recognize what drives changes in attendance. Knowing what works, what doesn't work — and where and why — allows operators to make wise investment decisions and to know what results can be expected. That's the heart of market and feasibility analysis.

### Do some operators exaggerate in order to look more successful? What can you do about that?

Our role is to share what the industry operators say officially or, if that information is not provided, to share our best estimate based on information that we do know as well as our professional experience. It's

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possible that some are over-reporting their numbers. We can't control that. However, all of the major operators are publicly owned and therefore obliged to report total attendance and financial performance information at the corporate level, even if they don't break it down to the park level.

Over-reporting may get an operator temporarily higher on the list than its competitors, but it will cause problems, some in the near term and others down the road. In the near term, if attendance is up but revenues or profitability are not, it raises questions. In the longer term, eventually, they'll hit a point where the numbers are too far off to be believable. Misrepresenting also complicates the picture if the company eventually goes public, or is acquired or wants to sell off an individual property. Operators know this.

Misreporting also raises false expectations. If you're trying to make an investment decision and forecast future performance, you need accurate information. If a property is not investing in regular improvements, yet reports that numbers are stable or growing, the numbers are suspect. Moreover, it's not the kind of secret that can be kept for long. People move from one operator to another and they take that knowledge with them. Consultants are called upon to help interested parties evaluate ongoing operations as well as potential new investments and activities.

In other words, over-reporting will eventually come to a point of correction. Our advice is to trust the process.

### **How do you estimate figures for individual parks and museums that don't report them?**

Fortunately, with more than 50-years experience working in the attractions industry, AECOM's Economics practice has a strong understanding of what drives performance at the park level and a robust process to estimate attendance where necessary.

The following outlines our general process:

- We start by reviewing publicly available information about the performance of the multi-park/attraction operators and also the individual parks/museums. We also review information that we have collected as part of the previous year's report and throughout the year.
- Where park/museum-level information is missing, we then ask the multi-park operators and the individual parks/museums to provide us with their attendance figures, and many of them do so directly.
- Where we do not receive specific park/museum-level figures from the operator, we use a detailed methodology that considers the following: historic attendance trends at the park/museum;

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generally available information on the park/museum and/or operator; park/museum changes, such as new rides, areas, shows, exhibits, ticket prices, intellectual property connections, etc.; general economy of the nation and the specific metropolitan area; tourism trends nationally and in the metropolitan area; for parks, weather trends in the area, particularly during peak periods; the performance of nearby parks/museums and other attractions; media coverage about the operator/park/museum; and select factors as relevant.

- Park/museum operators are also given the opportunity to review and comment on AECOM's estimate before the Theme Index and Museum Index are finalized and published. Of those that don't provide official figures at the park/museum level, we generally receive some form of feedback regarding the individual parks/museums. Leadership at TEA (the Themed Entertainment Association, which publishes and helps edit the report) plays an important role here, encouraging responses.
- As the leading provider of business planning studies worldwide for attractions, our group also works frequently with all of the major operators, parks, and museums, providing us with the opportunity to periodically compare our estimates with actual exact figures. We use this to adjust our methodology where necessary.
- As part of our active work in these markets and our awareness of what drives performance and the macroeconomics of different countries, we visit the parks and museums, watching for new development

and trends. We help to bring professional processes to the industry so that a higher level of quality can be transmitted from more developed markets into emerging markets. We frequently work for operators who are looking to enter the attractions business, or to grow or improve their existing operations. We also team with attraction master planners and designers to help correctly position and right-size parks and museums to match their market potential and optimize their financial performance.

### **What causes wide swings in performance at parks and museums?**

As can be seen from the process outlined above, there are a lot of factors affecting the performance of a park or museum, including past performance, new offerings, the economy, tourism, weather, media coverage, management, and more. Typically, large changes in attendance, up or down, are driven by major changes in one or more of these factors, with the relationship between the two frequently clear when examined in detail.

### **How is a water park defined for the purposes of the Theme Index?**

A water park must have a minimum of three water slides / flumes, a wave pool, retail and food areas, and at least two of the following other elements: tube rides; free-form pool; lazy river; and kids water play area. In Asia and America, the water parks are defined as outdoor facilities.



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**Why aren't other attraction types included, such as zoos and aquariums, observation experiences, and sports and performance venues?**

The report has evolved over the years, starting as just a report on major U.S. theme parks, with additional regions (EMEA, Asia, Latin America) and attraction types (water parks, museums) added over time. That said, we are indeed considering additional attraction types and will include these as interest is shown and resources allow.

**Is the Asian market on a path to saturation? So many projects are being announced.**

China still has quite a way to grow as do South East and South Asia. Demand from the market, population and tourism are all in a growth cycle. Smarter players understand the potential and the market is moving up to a better quality product. This is a boom time and likely to continue for another five years — and within it there will be great successes and failures. There will always be projects that don't succeed for one reason or another, such as poor concept, poor location, or under funding. There will be failures in the market when projects are done for the wrong reasons.

**How can so much growth (in Asia) be sustained?**

In China alone, there are about 200 cities with a population of one million or higher. That's not even considering Beijing or Shanghai. In the U.S., virtually every city with the equivalent population has a theme park or water park or similar kind of attraction. By this gauge, it is not surprising that China alone can support significant numbers of new parks.

**How does Asia's growth compare to the way the theme park industry developed in the U.S.?**

The difference is the scale and rapidity of growth, which is currently fueled by rapidly increasing income levels and a growing middle class. The development is also driven by government, which sees tourism, culture and theme parks as a good industry bet compared to smokestack industries. Growing the service economy, domestic tourism and domestic consumption are seen as employment generators. Government on all levels are encouraging the development of the themed entertainment industry in China and Asia.

**At what point will the Asian market overtake The Americas?**

We've forecast that will happen by 2020. It may be a little earlier than that; once we see Disney Shanghai and Universal Beijing open, we may revise the forecast.

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

#### **About AECOM**

AECOM is built to deliver a better world. We design, build, finance and operate infrastructure assets for governments, businesses and organizations in more than 150 countries. As a fully integrated firm, we connect knowledge and experience across our global network of experts to help clients solve their most complex challenges. From high-performance buildings and infrastructure, to resilient communities and environments, to stable and secure nations, our work is transformative, differentiated and vital. A *Fortune 500* firm, AECOM had revenue of approximately \$18 billion during fiscal year 2015. See how we deliver what others can only imagine at [aecom.com](http://aecom.com) and [@AECOM](https://twitter.com/AECOM).

#### **About TEA**

The TEA (Themed Entertainment Association) is an international, nonprofit membership association, founded in 1991 and based in Burbank, California USA. TEA represents some 10,000 creative specialists, from architects to designers, technical specialists to master planners, scenic fabricators to artists, and builders to feasibility analysts working in more than 1,250 firms in 40 different countries. TEA presents the annual Thea Awards and TEA Summit and hosts the annual SATE conference on Experience Design. TEA also produces a variety of print and electronic publications, and is pleased to collaborate with AECOM for the 10th consecutive year on the TEA/AECOM Theme Index and Museum Index. [www.teaconnect.org](http://www.teaconnect.org), [@TEA\\_Connect](https://twitter.com/TEA_Connect)