

THEME INDEX MUSEUM 2018 INDEX



GLOBAL ATTRACTIONS
ATTENDANCE REPORT

AECOM

TEA
THEMED
ENTERTAINMENT
ASSOCIATION

Cover image:
Chimelong Ocean Kingdom's Journey
Of Lights Parade — Zhuhai, China
Photo courtesy of Miziker Entertainment

CREDITS

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GLOBAL ATTRACTIONS ATTENDANCE REPORT

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

Published by the Themed Entertainment Association (TEA) and the Economics practice at AECOM.

1.9m

Thermas Water Park,
São Pedro, Brazil,
attendance 2018

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THE BIG PICTURE

5.4%

Top 10 theme park groups worldwide attendance growth 2017–18

501.2m

Top 10 theme park groups worldwide attendance 2018

475.8m

Top 10 theme park groups worldwide attendance 2017



JOHN ROBINETT

Senior Vice President – Economics

7.9%

Tokyo Disneyland at Tokyo Disney Resort, Tokyo, Japan, attendance growth 2017–18

2018 HAS BEEN A MILESTONE YEAR FOR THE THEMED ENTERTAINMENT INDUSTRY

Attendance at themed attractions at the major operators has exceeded half a billion visits for the first time in history. This is equivalent to almost 7% of the world population. And not only that, but this number keeps growing. Just five years ago, the market capture of the industry was only 5% of the global population.

This noteworthy achievement has been accomplished by focused capital investment, technology enhanced products, intellectual property based stories, and destination tourism development.

Tokyo Disneyland at Tokyo Disney Resort Tokyo, Japan
© Tokyo Disney Resort

This year also showed strong and steady business volume through most regions and attraction types. In an unusual alignment, theme park attendance grew by roughly 4% in all major markets. Waterparks' attendance rose at 2.5% globally, with North America at 5.8% and EMEA showing strong growth of 6.7%. The top museums were relatively flat this year.

Honorable mentions are in order this year for a number of players including: SeaWorld Parks & Entertainment which turned around from a 5% drop last year to an almost 9% increase this year; and several individual parks with double digit increases including: Chimelong Paradise in Guangzhou, Parque Warner in Madrid, Parque Xcaret in Mexico, and Changzhou Dinosaur Park in China.

We have observed a number of phenomena that have led to this and other strong years' performance in the business. These include the addition of second gates, the continued leveraging of blockbuster IP's, and the building of resort hotels adjacent to park properties.

Overall, it's been an outstanding year, as the themed entertainment industry has matured and been recognized not only as a significant driver of international development, economic impact, and tourism, but as a common shared global experience. We're looking forward to what next year brings with several special new attractions coming on line such as Disney's Star Wars: Galaxy's Edge, opening in both California and Florida.



18.8%

Parque Warner, Madrid, Spain attendance growth 2017-18

Parque Warner, Madrid, Spain © Parque Warner

TOP 10 THEME PARK GROUPS WORLDWIDE

RANK	GROUP NAME	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	WALT DISNEY ATTRACTIONS	4.9%	157,311,000	150,014,000
2	MERLIN ENTERTAINMENTS GROUP	1.5%	67,000,000	66,000,000
3	UNIVERSAL PARKS AND RESORTS	1.2%	50,068,000	49,458,000
4	OCT PARKS CHINA	15.1%	49,350,000	42,880,000
5	FANTAWILD	9.3%	42,074,000	38,495,000
6	CHIMELONG GROUP	9.6%	34,007,000	31,031,000
7	SIX FLAGS INC.	5.3%	32,024,000	30,421,000*
8	CEDAR FAIR ENTERTAINMENT COMPANY	0.7%	25,912,000	25,723,000*
9	SEAWORLD PARKS & ENTERTAINMENT	8.6%	22,582,000	20,798,000*
10	PARQUES REUNIDOS	1.5%	20,900,000	20,600,000
TOP 10 ATTENDANCE GROWTH 2017-18		5.4%	501,228,000	475,767,000*

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* Adjustment versus the figure we published in last year's report

5.4%

Top 10 theme park groups worldwide attendance growth 2017-18

501.2m

Top 10 theme park groups worldwide attendance 2018

475.8m*

Top 10 theme park groups worldwide attendance 2017

TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	2.0%	20,859,000	20,450,000
2	DISNEYLAND PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	2.0%	18,666,000	18,300,000
3	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	7.9%	17,907,000	16,600,000
4	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	8.5%	14,651,000	13,500,000
5	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	-4.3%	14,300,000	14,935,000
6	DISNEY'S ANIMAL KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	10.0%	13,750,000	12,500,000
7	EPCOT THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	2.0%	12,444,000	12,200,000
8	SHANGHAI DISNEYLAND, SHANGHAI, CHINA	7.3%	11,800,000	11,000,000
9	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	5.0%	11,258,000	10,722,000
10	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	10.6%	10,830,000	9,788,000
11	UNIVERSAL STUDIOS FLORIDA THEME PARK AT UNIVERSAL ORLANDO RESORT, FL, U.S.	5.0%	10,708,000	10,198,000
12	DISNEY CALIFORNIA ADVENTURE PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	3.0%	9,861,000	9,574,000

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	
13	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	1.9%	9,843,000	9,660,000	
14	UNIVERSAL'S ISLANDS OF ADVENTURE THEME PARK AT UNIVERSAL ORLANDO RESORT, FL, U.S.	2.5%	9,788,000	9,549,000	
15	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	1.0%	9,147,000	9,056,000	
16	HONG KONG DISNEYLAND, HONG KONG SAR	8.1%	6,700,000	6,200,000	
17	LOTTE WORLD, SEOUL, SOUTH KOREA	-11.2%	5,960,000	6,714,000	
18	NAGASHIMA SPA LAND, KUWANA, JAPAN	-0.2%	5,920,000	5,930,000	
19	EVERLAND, GYEONGGI-DO, SOUTH KOREA	-7.3%	5,850,000	6,310,000	
20	OCEAN PARK, HONG KONG SAR	0.0%	5,800,000	5,800,000	
21	EUROPA PARK, RUST, GERMANY	0.4%	5,720,000	5,700,000	
22	DE EFTELING, KAATSHEUVEL, NETHERLANDS	4.2%	5,400,000	5,180,000	
23	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	1.9%	5,298,000	5,200,000	
24	TIVOLI GARDENS, COPENHAGEN, DENMARK	4.5%	4,850,000	4,640,000	
25	CHIMELONG PARADISE, GUANGZHOU, CHINA	11.9%	4,680,000	4,181,000	
TOP 25 TOTAL ATTENDANCE 2018			251,490,000	243,887,000	
TOP 25 ATTENDANCE GROWTH 2017-18			3.3%	251,990,000	243,926,000

© 2019 TEA / AECOM

3.3%

Top 25 amusement/theme parks worldwide attendance growth 2017-18

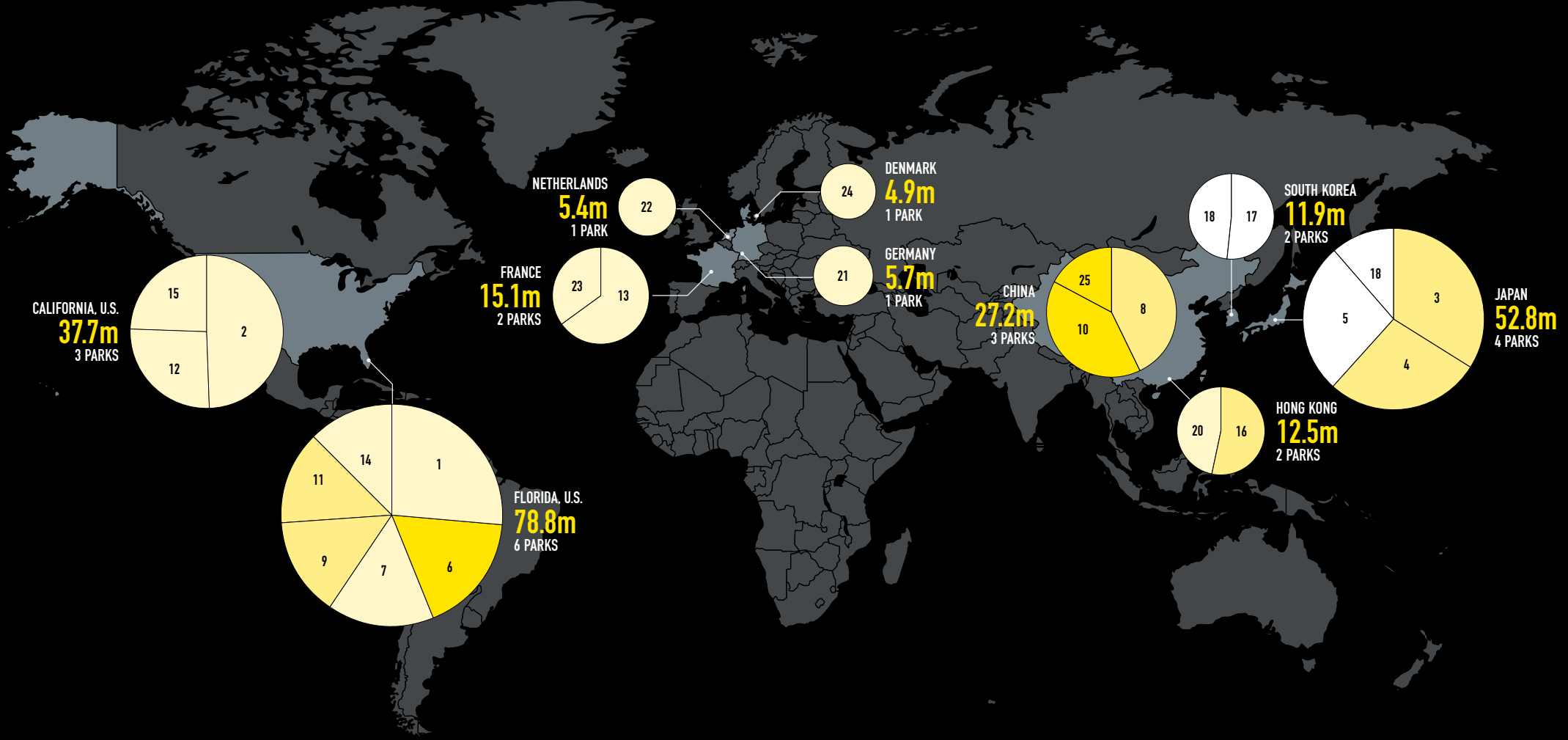
252.0m

Top 25 amusement/theme parks worldwide attendance 2018

243.9m

Top 25 amusement/theme parks worldwide attendance 2017

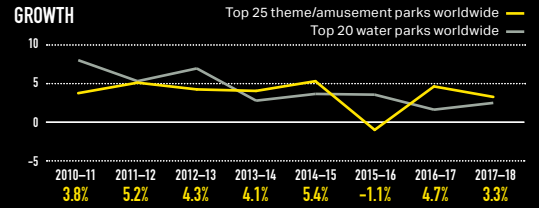
TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE



MAP KEY

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

- <0% (White)
- 0%-4.9% (Light Yellow)
- 5%-9.9% (Yellow)
- 10%+ (Dark Yellow)



3.3%
Top 25 amusement/theme parks worldwide attendance growth 2017-18

252.0m
Top 25 amusement/theme parks worldwide attendance 2018

243.9m
Top 25 amusement/theme parks worldwide attendance 2017

TOP 20 WATER PARKS WORLDWIDE

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	1.9%	2,740,000	2,690,000
2	TYPHOON LAGOON WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	5.0%	2,271,000	2,163,000
3	DISNEY'S BLIZZARD BEACH WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	3.0%	2,003,000	1,945,000
4	PARQUE AQUÁTICO THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	-1.8%	1,971,000	2,007,000
5	AQUAVENTURE ATLANTIS BAHAMAS WATERPARK, PARADISE ISLAND, BAHAMAS	0.0%	1,831,000	1,831,000
6	VOLCANO BAY WATER THEME PARK AT UNIVERSAL ORLANDO RESORT, ORLANDO, FL, U.S.	15.0%	1,725,000	1,500,000
7	AQUATICA ORLANDO, ORLANDO, FL, U.S.	8.5%	1,556,000	1,434,000*
8	THERME ERDING, ERDING, GERMANY	13.6%	1,500,000	1,320,000
9	HOT PARK RIO QUENTE, CALDAS NOVAS, BRAZIL	-3.2%	1,433,000	1,481,000

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
10	AQUAVENTURE WATER PARK, DUBAI, U.A.E.	3.5%	1,397,000	1,350,000
11	WUHU FANTAWILD WATER PARK, WUHU, CHINA	13.3%	1,360,000	1,200,000
12	KAIFENG YINJI WATER PARK, KAIFENG, CHINA	3.8%	1,350,000	1,300,000
13	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	0.0%	1,300,000	1,300,000
14	AQUAPALACE, PRAGUE, CZECH REPUBLIC	6.0%	1,288,000	1,215,000
15	OCEAN WORLD, GANGWON-DO, SOUTH KOREA	-5.0%	1,264,000	1,330,000
16	SIAM PARK, SANTA CRUZ DE TENERIFE, SPAIN	0.1%	1,210,000	1,209,000
17	CARIBBEAN BAY, GYEONGGI-DO, SOUTH KOREA	-13.0%	1,200,000	1,380,000
	SHENYANG ROYAL OCEAN PARK — WATER WORLD, FUSHUN, CHINA	0.0%	1,200,000	1,200,000
	TROPICAL ISLANDS, KRAUSNICK, GERMANY	2.7%	1,200,000	1,168,000
20	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	-5.1%	1,120,000	1,180,000
TOP 20 TOTAL ATTENDANCE 2018			30,919,000	30,203,000
TOP 20 ATTENDANCE GROWTH 2017-18		2.5%	30,919,000	30,155,000

© 2019 TEA / AECOM

* Adjustment versus the figure we published in last year's report

2.5%

Top 20 water parks worldwide attendance growth 2017-18

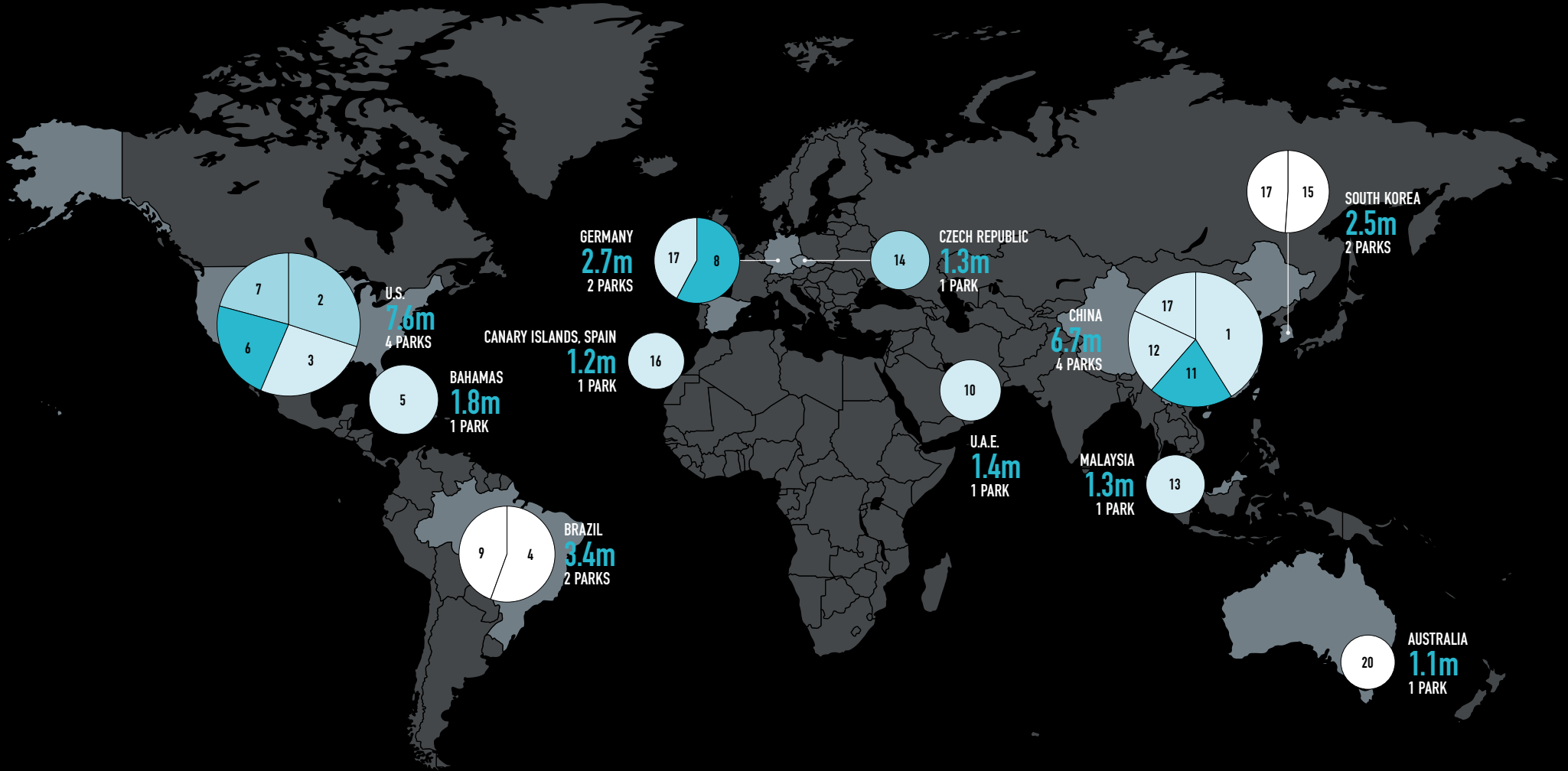
30.9m

Top 20 water parks worldwide attendance 2018

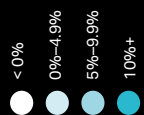
30.2m

Top 20 water parks worldwide attendance 2017

TOP 20 WATER PARKS WORLDWIDE

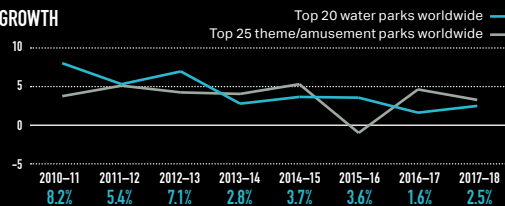


MAP KEY



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

GROWTH



2.5%

Top 20 water parks worldwide attendance growth 2017-18

30.9m

Top 20 water parks worldwide attendance 2018

30.2m

Top 20 water parks worldwide attendance 2017

TOP 20 MUSEUMS WORLDWIDE

RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	FREE/PAID
1	LOUVRE, PARIS, FRANCE	25.9%	10,200,000	8,100,000	P
2	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	6.8%	8,610,000	8,063,000	F
3	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	5.1%	7,360,000	7,000,000	P
4	VATICAN MUSEUMS, VATICAN, VATICAN CITY	5.1%	6,756,000	6,427,000	P
5	NATIONAL AIR AND SPACE MUSEUM, WASHINGTON, DC, U.S.	-11.4%	6,200,000	7,000,000	F
6	BRITISH MUSEUM, LONDON, U.K.	3.8%	5,869,000	5,656,000	F
7	TATE MODERN, LONDON, U.K.	-1.3%	5,829,000	5,907,000	F
8	NATIONAL GALLERY, LONDON, U.K.	9.7%	5,736,000	5,229,000	F
9	NATURAL HISTORY MUSEUM, LONDON, U.K.	17.8%	5,226,000	4,435,000	F
10	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	0.0%	5,000,000	5,000,000	P

RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	FREE/PAID
11	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC, U.S.	-20.0%	4,800,000	6,000,000	F
12	NATIONAL GALLERY OF ART, WASHINGTON, DC, U.S.	-15.8%	4,404,000	5,232,000	F
13	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	10.5%	4,400,000	3,983,000	P
14	STATE HERMITAGE, ST PETERSBURG, RUSSIA	1.8%	4,294,000	4,220,000	P
15	ZHEJIANG MUSEUM, HANGZHOU, CHINA	14.4%	4,200,000	3,670,000	F
16	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	4.7%	3,968,000	3,790,000	P
17	REINA SOFÍA, MADRID, SPAIN	0.0%	3,898,000	3,897,000	F
18	NATIONAL PALACE MUSEUM (TAIWAN), TAIPEI, TAIWAN	-13.0%	3,860,000	4,436,000	P
19	NATIONAL MUSEUM OF AMERICAN HISTORY, WASHINGTON, DC, U.S.	0.0%	3,800,000	3,800,000	F
20	NANJING MUSEUM, NANJING, CHINA	11.2%	3,670,000	3,300,000	F
TOP 20 TOTAL ATTENDANCE 2018			108,080,000	105,145,000	
TOP 20 ATTENDANCE GROWTH 2017-18			0.1%	108,080,000	107,967,000

© 2019 TEA / AECOM

0.1%

Top 20 museums worldwide attendance growth 2017-18

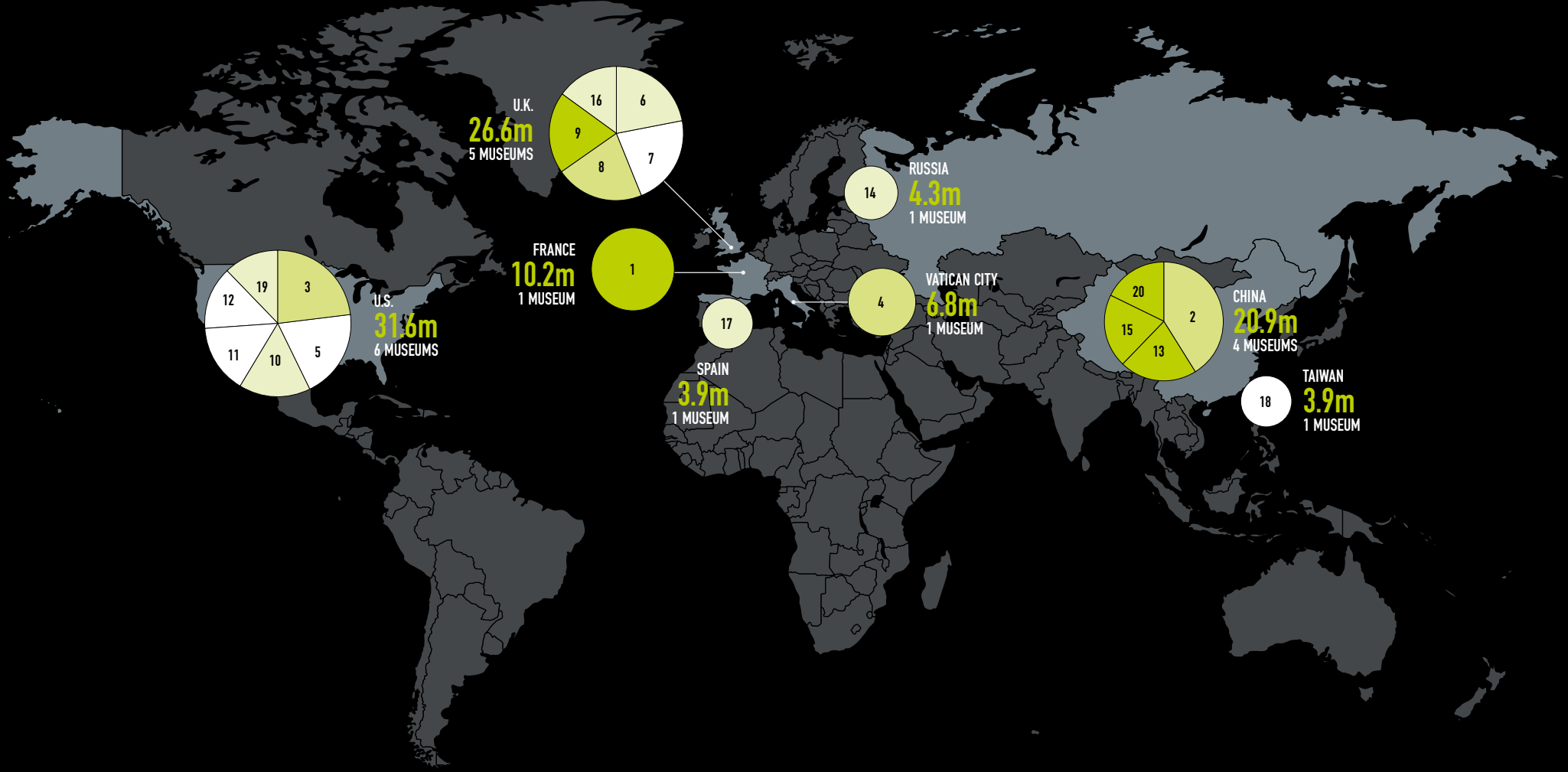
108.1m

Top 20 museums worldwide attendance 2018

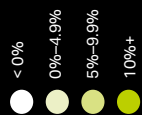
108.0m

Top 20 museums worldwide attendance 2017

TOP 20 MUSEUMS WORLDWIDE

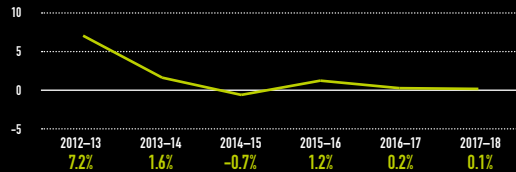


MAP KEY



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

GROWTH



0.1%

Top 20 museums worldwide attendance growth 2017-18

108.1m

Top 20 museums worldwide attendance 2018

108.0m

Top 20 museums worldwide attendance 2017

THE AMERICAS

4.0%

Top 20 amusement/
theme parks North
America attendance
growth 2017–18

157.5m

Top 20 amusement/
theme parks North
America attendance
2018

151.4m

Top 20 amusement/
theme parks North
America attendance
2017



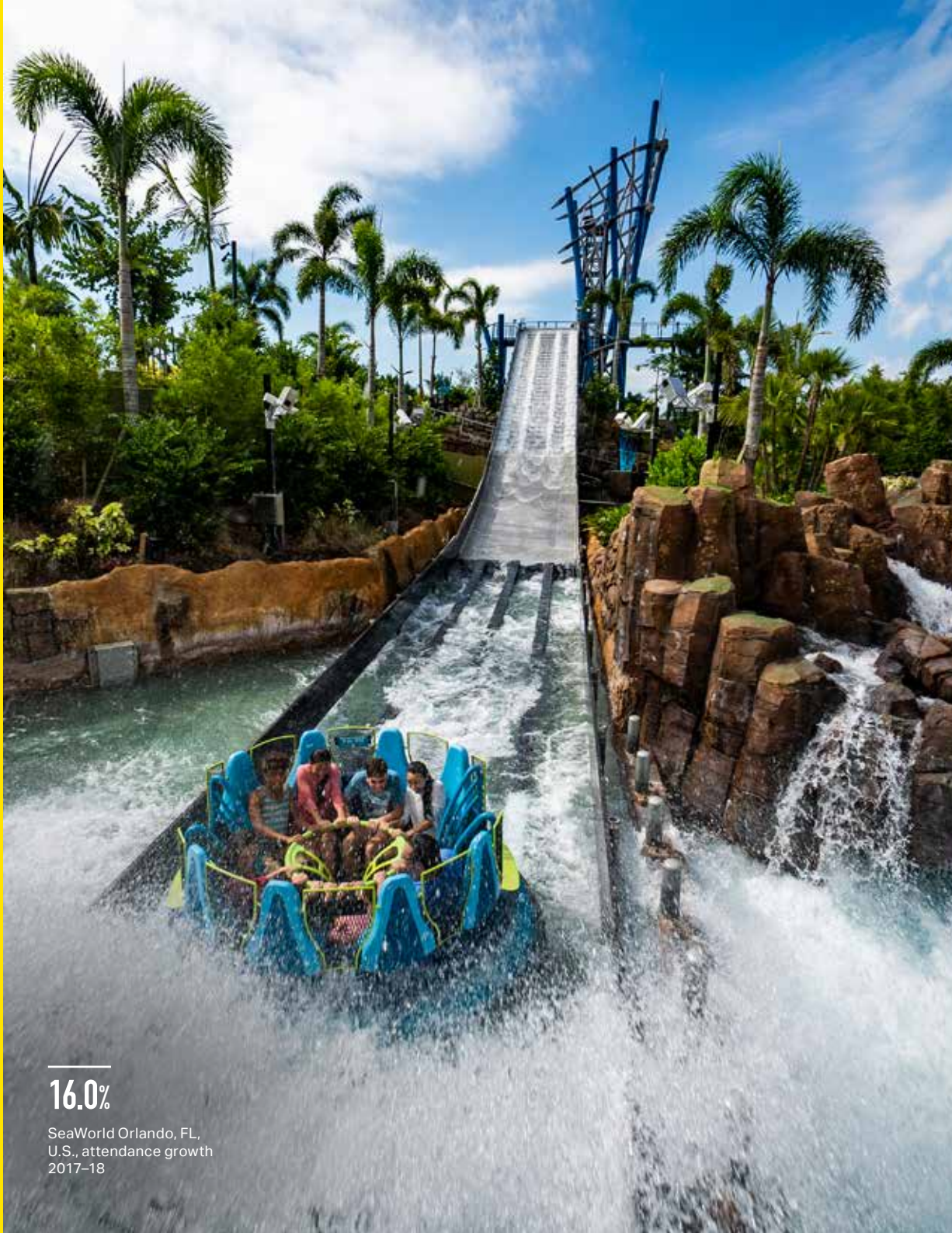
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16.0%

SeaWorld Orlando, FL,
U.S., attendance growth
2017–18

Theme parks

BIG GROWTH IS IP-DRIVEN

Attendance at the Top 20 North American Theme Parks grew by 4% overall in 2018, a substantial increase for this mature market, representing growth of 6.1 million visits. This was notably higher than the previous two years' increases (2.3% in 2017 and 1.2% in 2016).

The increase of more than 6 million visits at North American parks was led by growth among top operators Disney, Universal and SeaWorld, with particularly good performance from Disney's Animal Kingdom, SeaWorld Orlando and SeaWorld San Diego, Disney's Hollywood Studios, and Universal Studios in Florida. The Six Flags chain also showed increases for 2018, largely driven by the acquisition of five new parks bringing about 2 million in additional attendance.

The biggest growth is IP-driven. Innovative experiences, rides and programming are also important drivers. The big players are in a position to command the big IP. They have full awareness to the power of these franchises and to what good, creative use of IP in a storytelling environment — made immersive with state-of-the-art technology — enables them to do.

SeaWorld Orlando, FL, U.S.
© SeaWorld Orlando

Disney and Universal

For the biggest operators, even a modest year-over-year increase represents a lot of visitation, as evidenced by what our charts show for Disney and Universal parks in Florida and California.

Speaking of big IPs, since first bringing the Avatar IP to life on the theme park platform in May 2017 at Disney's Animal Kingdom (Orlando), Pandora — The World of Avatar continued to be a strong attendance driver in 2018. Toy Story Land, the latest iteration of which opened at Disney's Hollywood Studios in June 2018, was another driver. The Toy Story franchise continues to capture a new generation of children every time a new movie comes out while older fans stay fans.

Looking ahead, we can expect that next year's numbers will likely show massive attendance impact for Disney in North America, from the 2019 openings of Star Wars: Galaxy's Edge at Disneyland in May and at Walt Disney World in August. Attendance at Disney's Typhoon Lagoon and Blizzard Beach water parks bounced back in 2018 after a decline in 2017 attributed to poor weather — these water parks continue to be the most visited in North America.

Universal Studios parks in North America earned modest attendance increases overall in 2018, with the biggest growth at Volcano Bay, Universal's new water theme park, open since May 2017 and recipient of a TEA Thea Award in 2019.



18.7m

Disneyland Park,
Anaheim, CA, U.S.,
attendance 2018

Pixar Play Parade, Disneyland Park,
Disneyland Resort, Anaheim, CA, U.S.
© Joshua Sudock/Disneyland Resort



9.1m

Universal Studios
Hollywood, Universal
City, CA, U.S.,
attendance 2018

Kung Fu Panda, Universal Studios
Hollywood, Universal City, CA, U.S.
© Universal Studios Hollywood

In Orlando, Universal is continuing to build, having acquired new real estate and with a new gate, new land, and Nintendo theming among the coming developments at Universal Studios Florida as the area rebounds from tourism lost due to hurricanes in 2017. In Universal City, California, attendance growth at Universal Studios Hollywood was about 1%, attributable to overall growth of the market supported by reinvestment such as the park's new Kung Fu Panda attraction.

SeaWorld

SeaWorld parks had been moving down our charts for several years but 2018 attendance numbers show a nice comeback with room for more regrowth. Globally — referencing our Top 25 Theme Park Groups Worldwide chart — SeaWorld 2018 attendance ranks below that of North American regional chains Six Flags and Cedar Fair, but more change is in the wind as SeaWorld starts to become an international brand.

The 2018 SeaWorld Parks attendance figures recoup the previous year's decline and surpass it, helped by significant increases at SeaWorld Orlando and SeaWorld San Diego as well as a modest increase at Busch Gardens Tampa.

SeaWorld's good performance is creditable to investments in new rides and programming and leveraging the Sesame Street IP, in addition to working actively to change the conversation about the parks — internally and externally — and making other positive changes.

Staying competitive: IP, immersion and expansion

The level of immersion that our industry is now able to deliver is other-worldly, thanks to digital technology. The past few years have seen Universal and Disney each roll out unique, super-rich IP-based environments, in the form of the Harry Potter worlds (Universal) and Avatar realm (Disney), whose tremendous success has reset the entire industry. Looking forward, Disney's soon-to-open Star Wars: Galaxy's Edge lands are expected to take things to a whole new level of immersion.

This trend has enabled the high levels of investment we're now seeing and will continue to see as operators mine the riches of their IP and creatives explore the possibilities of available technology. There will be more, great and game-changing, new out-of-home guest experiences coming our way. The big parks have the resources to create and deliver experiences people can't get at home. And it's important to note that immersive environments aren't just about what you do — they're also elaborate photo backdrops, providing guests with settings that facilitate their online personae.

That said, everyone is paying attention to the dramatic growth of the video games industry along with the rise of competitive video gaming/esports as an industry, and the power of both. Fortnite is a compelling example of a gaming platform that's also a social platform. But parks have the ability to deliver shared, real-world immersive experiences with broad appeal, and are collaborating with IP owners to leverage multi-channel marketing.

Regionality

For smaller parks to also serve up magically immersive experiences is more within reach than it was 20 years ago — or even five years ago — because of the accessibility of technology. The big question is, what IPs will they have access to? However, we do see operators other than Disney and Universal working with the IP model: Cedar Fair and Snoopy (Peanuts), SeaWorld and Sesame Street, Six Flags and DC Comics. The challenges to do so include making licensing arrangements with the IP holder, which can be costly, and all the subsequent steps of creating the built environment and experience that are true to the IP.



THERE WILL BE MORE, GREAT AND GAME-CHANGING, NEW OUT-OF-HOME GUEST EXPERIENCES COMING OUR WAY. THE BIG PARKS HAVE THE RESOURCES TO CREATE AND DELIVER EXPERIENCES PEOPLE CAN'T GET AT HOME.

Or will regional parks note the Meow Wolf model and bring in the local art collective instead? We've seen that happen recently at Elitch Gardens and spark a lot of interest on social media and mainstream media. Emphasizing the flavor of one's particular region can be a powerful differentiator, and North American regional parks could do well to take a page from European parks' success on that front.

Expansion, hospitality and season passes are all methods of increasing attendance. Adding a second gate and adding hotels transform a park into a resort and a day trip into a longer stay. The recent Six Flags acquisitions have been part of a strategy to add existing water parks located near the chain's existing theme parks. Giving guests the option to buy a multi-park pass that lets them enjoy two different experiences in the same metro area encourages the overnight stay and gives people more things to do.



20.1%

SeaWorld San Diego, CA, U.S., attendance growth 2017-18

SeaWorld San Diego, CA, U.S.
© SeaWorld San Diego

LATIN AMERICA AND MEXICO — A LOCALIZED FOCUS

The top theme parks in Latin America enjoyed aggregate attendance growth of more than 4%, which is excellent. As with North America, this growth is partly due to recovery from the prior year's bad weather (the numbers were down by 2% in 2017), and partly a testament to the benefits of reinvesting and season extension. An unfortunate exception is Hopi Hari, which in the past held a high ranking but recently spiraled into bankruptcy and slipped off the list of top theme parks in Latin America.

Parks in these regions cater primarily to residents and domestic tourists. Success comes from understanding those markets and serving them with unique, tailored experiences that play to the region's unique character.

Along the coast near Cancun, Mexico's Grupo Xcaret is one for all regional operators to watch and learn from, as it has continued to grow its signature innovative offerings and attendance, year over year. In terms of sophisticated, regional authenticity and consistency this operator is outstanding, knowing and serving local and residential tourist markets, in naturalistic settings with water features and historical and geological elements. Each is within driving distance of the others, and offered on a standalone or package basis. Each is a unique, picturesque park or experience with its own identity and mix of activities, including cultural programs, historic components, underwater cave swimming, luxurious dining on a lake, swimming with dolphins and more. Two hotels are now part of the Xcaret mix, located adjacent to Parque Xcaret, pushing its attendance up by a remarkable 25%. This exemplifies regionally tailored, multi-gate, multi-day destination resort development at its best.



6.4%

Parque del Café,
Quindío, Colombia,
attendance growth
2017-18

Parque del Café, Quindío, Colombia
© Parque del Café



SUCCESS COMES FROM UNDERSTANDING THOSE MARKETS AND SERVING THEM WITH UNIQUE, TAILORED EXPERIENCES THAT PLAY TO THE REGION'S UNIQUE CHARACTER.

In the Mexico City area, Six Flags México and La Feria de Chapultepec both prosper by making the most of serving residential and regional markets with earmarks of regional culture that look and feel authentic.

In Bogota, Salitre Mágico extends its calendar with the Festival of Terror, a scare experience featuring sinister clowns. Outside Bogota, Parque del Café is themed on coffee. Fantasilandia has extended its operating season.

Water parks

NORTH AMERICA: BETTER WEATHER AND BETTER NUMBERS

It's heartening to see that the 2018 water park attendance numbers show recovery and then some from the weather-related dip of the previous year. The top North American water parks showed attendance growth of nearly 6% for 2018. Some parks benefited from substantial increases, reflecting new attractions as well as recovery from the previous year's weather including Zoombezi Bay (Powell, OH), Typhoon Texas, Adventure Island in Tampa and Splish Splash (Calverton, NY). Reinvestment helped in addition to better weather: Typhoon Texas added three new pools and Splish Splash added two new rides. Disney's Orlando water parks Typhoon Lagoon and Blizzard Beach retained their positions at the top.



7.9%

Typhoon Texas
Waterpark, Katy,
TX, U.S., attendance
growth 2017-18

Typhoon Texas Waterpark, Katy, Texas, U.S.
© Typhoon Texas

Universal's Volcano Bay, a unique newcomer settling into its market, drew excellent attendance, up 15% versus its first year. As a separate-gate offering, Volcano Bay is a valuable addition to Universal's continued expansion and diversification of its Orlando property as a destination resort.

Under the SeaWorld umbrella, Aquatica in Orlando bounced back with visitation growth of about 125,000. Recently repositioned as a second gate to SeaWorld San Antonio, the Aquatica park in that city also did well in 2018.

LATIN AMERICA: NEW TRENDS AND PLAYERS

The top water parks in Latin America had essentially flat attendance in 2018, with up and down fluctuations and some parks making their first appearance on the list.

In Olimpia, Brazil, Parque Aquático – Thermas dos Laranjais attendance numbers were down by nearly 2% for 2018. The park maintained its first-place position on our list of the Top 10 Water Parks in Latin America and is in fourth place on our list of Top 20 Water Parks Worldwide; however, it faces new competition from nearby Hot Beach, which recently zoomed onto the scene and has changed the local landscape. Parque Aquático – Thermas dos Laranjais — a massive, busy property — has enjoyed a large market share for many years with its low- to mid-priced offerings targeted to guests who primarily visit by automobile from São Paulo. Hot Beach has differentiated itself and shown there's a market among upper-middle-class air travelers, who also avail themselves of the park's integrated hotels, also higher-end than Thermas' adjoining hotel towers.



SUCCESS COMES WHEN OPERATORS HAVE A CLEAR SENSE OF THEIR MARKETS AND HOW TO SERVE THEM WITH GOOD OPERATIONS AND, OF COURSE, SMART REINVESTMENT

In São Pedro, Thermas Water Park has shown significant attendance growth for the past two years (more than 18% in 2017 and more than 22% in 2018). The park added nearly 500 rooms with its new hotel/vacation club property that opened in late 2017 and has further strengthened its position through reinvestment and growing its market via strategic alliances with national tourism agencies.

Wet 'n Wild São Paulo posted a modest increase of about 5%. This water park, which serves the same market as did Hopi Hari before the latter collapsed, reinvested with a new ride and new drop slide. Numbers were relatively flat for Piscilago (Bogota), Parque Acuático Xocomil (Guatemala) and El Rollo Parque Acuatico (Mexico).

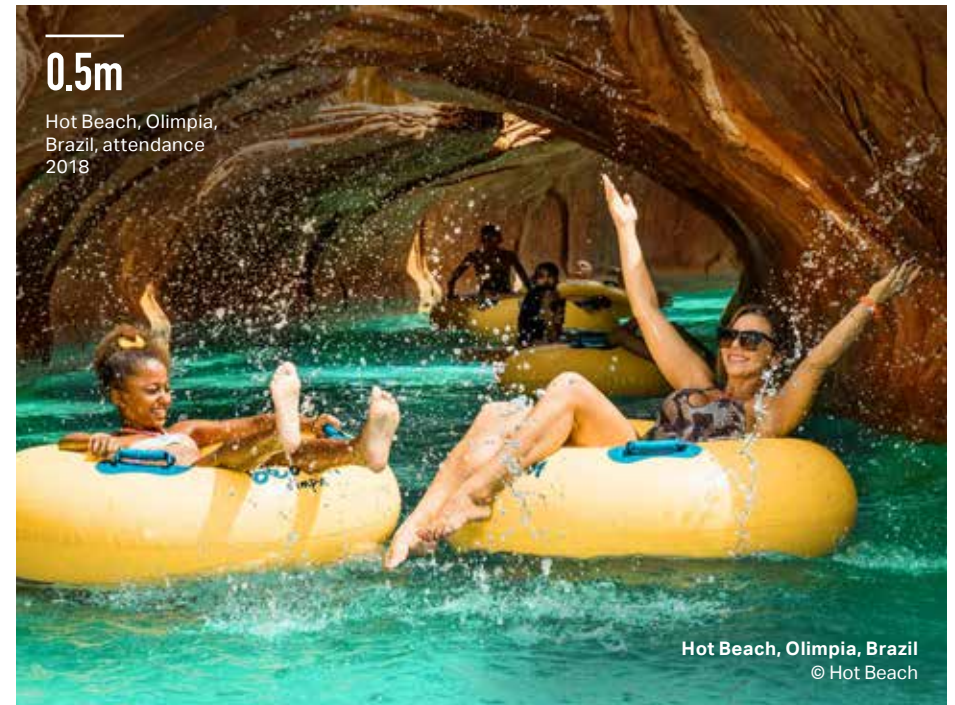
Ups and downs in the water park sector generally can be traced to weather, economic and/or political situations, reinvestment or lack thereof, and challenges from the competition. Success comes when operators have a clear sense of their markets and how to serve them with good operations and, of course, smart reinvestment.



13.5%

Zoombezi Bay,
Powell, OH, U.S.,
attendance growth
2017-18

Zoombezi Bay, Powell, OH, U.S.
© Graham S. Jones, Columbus Zoo and Aquarium

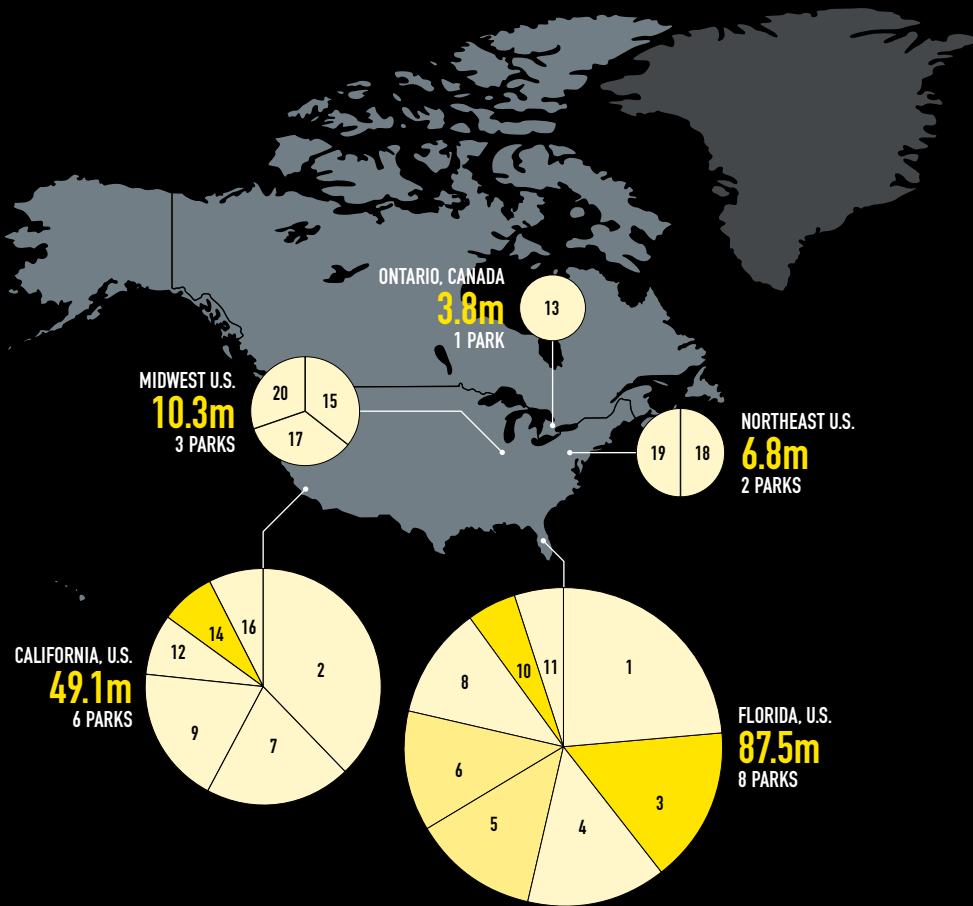


0.5m

Hot Beach, Olimpia,
Brazil, attendance
2018

Hot Beach, Olimpia, Brazil
© Hot Beach

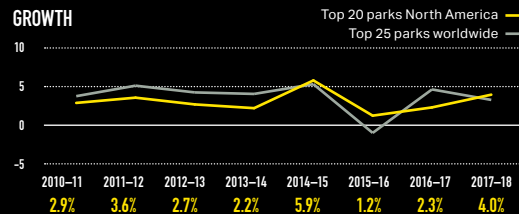
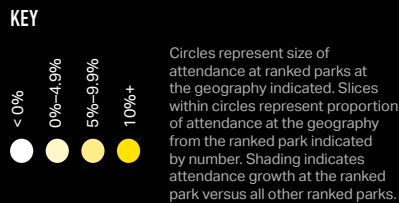
TOP 20 AMUSEMENT/THEME PARKS NORTH AMERICA



RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	2.0%	20,859,000	20,450,000
2	DISNEYLAND PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	2.0%	18,666,000	18,300,000
3	DISNEY'S ANIMAL KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	10.0%	13,750,000	12,500,000
4	EPCOT THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	2.0%	12,444,000	12,200,000
5	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	5.0%	11,258,000	10,722,000
6	UNIVERSAL STUDIOS FLORIDA THEME PARK AT UNIVERSAL ORLANDO RESORT, FL, U.S.	5.0%	10,708,000	10,198,000
7	DISNEY CALIFORNIA ADVENTURE PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	3.0%	9,861,000	9,574,000
8	UNIVERSAL'S ISLANDS OF ADVENTURE THEME PARK AT UNIVERSAL ORLANDO RESORT, FL, U.S.	2.5%	9,788,000	9,549,000
9	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	1.0%	9,147,000	9,056,000
10	SEAWORLD ORLANDO, ORLANDO, FL, U.S.	16.0%	4,594,000	3,962,000
11	BUSCH GARDENS TAMPA BAY, TAMPA, FL, U.S.	4.5%	4,139,000	3,961,000
12	KNOTT'S BERRY FARM, BUENA PARK, CA, U.S.	2.0%	4,115,000	4,034,000
13	CANADA'S WONDERLAND, MAPLE, ONTARIO, CANADA	1.0%	3,798,000	3,760,000
14	SEAWORLD SAN DIEGO, SAN DIEGO, CA, U.S.	20.1%	3,723,000	3,100,000
15	CEDAR POINT SHORES WATERPARK, SANDUSKY, OH, U.S.	2.0%	3,676,000	3,604,000
16	SIX FLAGS MAGIC MOUNTAIN, VALENCIA, CA, U.S.	2.6%	3,592,000	3,500,000*
17	KINGS ISLAND, KINGS ISLAND, OH, U.S.	0.5%	3,486,000	3,469,000
18	SIX FLAGS GREAT ADVENTURE, JACKSON, NJ, U.S.	0.0%	3,400,000	3,400,000*
19	HERSHEYPARK, HERSHEY, PA, U.S.	2.0%	3,367,000	3,301,000
20	SIX FLAGS GREAT AMERICA, GURNEE, IL, U.S.	0.0%	3,107,000	3,107,000*
TOP 20 TOTAL ATTENDANCE 2018			157,478,000	151,747,000
TOP 20 ATTENDANCE GROWTH 2017-18			4.0%	157,478,000

© 2019 TEA / AECOM

* Adjustment versus the figure we published in last year's report



4.0%

Top 20 amusement/theme parks North America attendance growth 2017-18

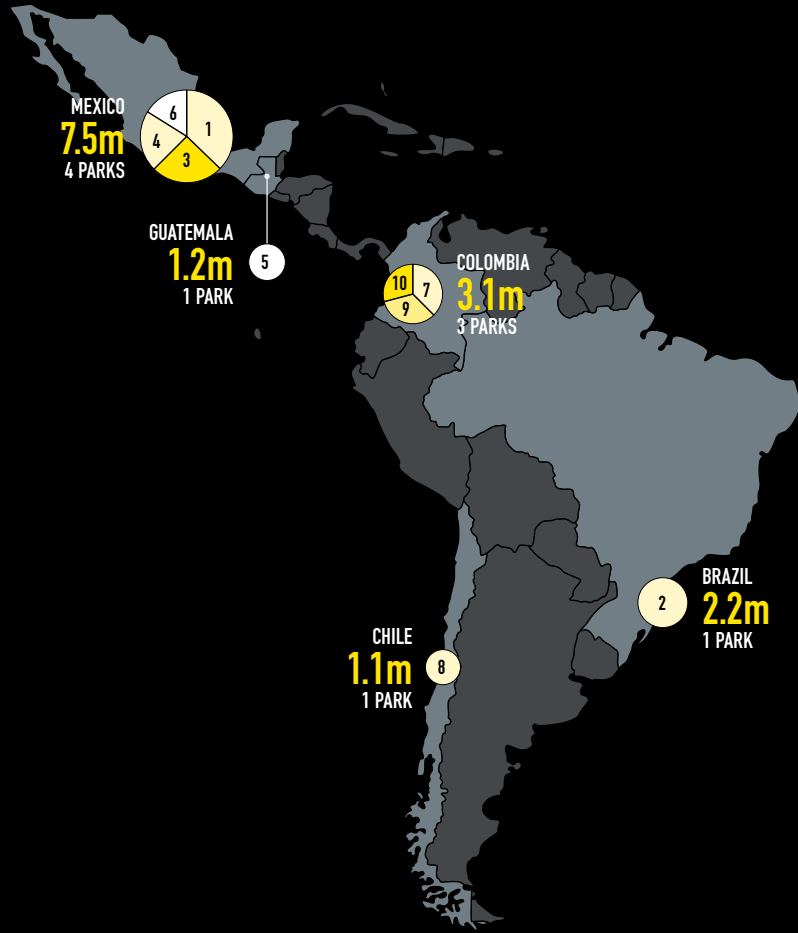
157.5m

Top 20 amusement/theme parks North America attendance 2018

151.4m

Top 20 amusement/theme parks North America attendance 2017

TOP 10 AMUSEMENT/THEME PARKS LATIN AMERICA

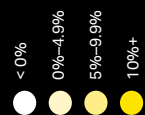


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	
1	SIX FLAGS MÉXICO, MEXICO CITY, MEXICO	2.0%	2,789,000	2,734,000*	
2	BETO CARRERO WORLD, SANTA CATARINA, BRAZIL	3.7%	2,200,000	2,122,000	
3	PARQUE XCARET, CANCUN, MEXICO	25.2%	1,885,000	1,505,000	
4	LA FERIA DE CHAPULTEPEC, MEXICO CITY, MEXICO	0.1%	1,593,000	1,591,000	
5	MUNDO PETAPA, GUATEMALA CITY, GUATEMALA	-1.0%	1,226,000	1,239,000	
6	PARQUE PLAZA SÉSAMO, MONTERREY, MEXICO	-1.0%	1,185,000	1,197,000	
7	PARQUE MUNDO AVENTURA, BOGOTÁ, COLOMBIA	0.4%	1,158,000	1,153,000	
8	FANTASIALANDIA, SANTIAGO, CHILE	4.8%	1,100,000	1,050,000	
9	PARQUE DEL CAFÉ, QUINDIO, COLOMBIA	6.4%	1,028,000	966,000	
10	SALITRE MÁGICO, BOGOTÁ, COLOMBIA	18.4%	900,000	760,000	
TOP 10 TOTAL ATTENDANCE 2018			15,064,000	14,317,000	
TOP 10 ATTENDANCE GROWTH 2017-18			4.2%	15,064,000	14,461,000

© 2019 TEA / AECOM

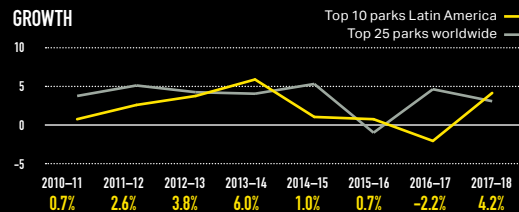
* Adjustment versus the figure we published in last year's report

KEY



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

GROWTH



4.2%

Top 10 amusement/theme parks Latin America attendance growth 2017-18

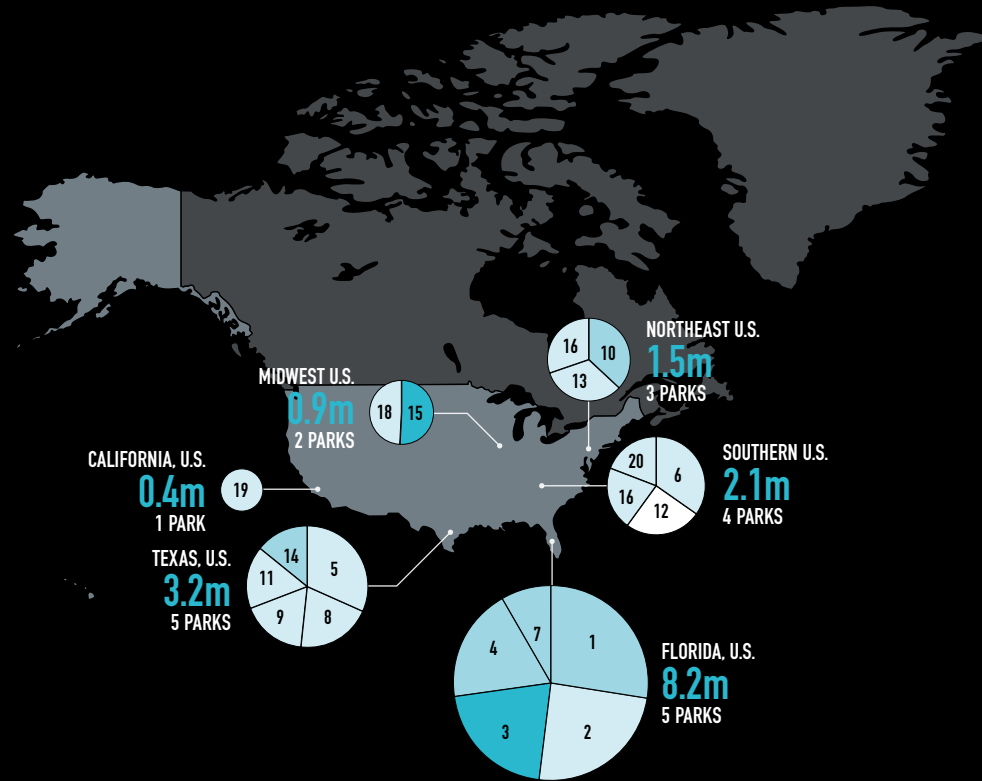
15.1m

Top 10 amusement/theme parks Latin America attendance 2018

14.5m

Top 10 amusement/theme parks Latin America attendance 2017

TOP 20 WATER PARKS NORTH AMERICA

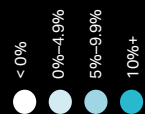


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	
1	TYPHOON LAGOON WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	5.0%	2,271,000	2,163,000	
2	DISNEY'S BLIZZARD BEACH WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	3.0%	2,003,000	1,945,000	
3	VOLCANO BAY WATER THEME PARK AT UNIVERSAL ORLANDO RESORT, ORLANDO, FL, U.S.	15.0%	1,725,000	1,500,000	
4	AQUATICA ORLANDO, ORLANDO, FL, U.S.	8.5%	1,556,000	1,434,000*	
5	SCHLITTERBAHN WATER PARK AND RESORT NEW BRAUNFELS, NEW BRAUNFELS, TX, U.S.	1.0%	1,016,000	1,006,000	
6	WATER COUNTRY USA, WILLIAMSBURG, VA, U.S.	2.5%	729,000	711,000	
7	ADVENTURE ISLAND, TAMPA, FL, U.S.	6.0%	669,000	631,000	
8	AQUATICA SAN ANTONIO, SAN ANTONIO, TX, U.S.	3.2%	645,000	625,000	
9	SCHLITTERBAHN WATERPARK GALVESTON, GALVESTON, TX, U.S.	2.6%	559,000	545,000	
10	SPLISH SPASH, CALVERTON, NY, U.S.	5.1%	539,000	513,000	
11	SIX FLAGS HURRICANE HARBOR ARLINGTON, ARLINGTON, TX, U.S.	0.0%	533,000	533,000	
12	SIX FLAGS WHITE WATER ATLANTA, MARIETTA, GA, U.S.	-5.0%	531,000	559,000	
13	SIX FLAGS HURRICANE HARBOR NEW JERSEY, JACKSON, NJ, U.S.	0.0%	475,000	475,000*	
14	TYPHOON TEXAS WATERPARK, KATY, TX, U.S.	7.9%	451,000	418,000	
15	ZOOMBEZI BAY, POWELL, OH, U.S.	13.5%	438,000	386,000	
16	CAMELBEACH MOUNTAIN WATERPARK, TANNERSVILLE, PA, U.S.	3.1%	437,000	424,000	
	DOLLYWOOD'S SPLASH COUNTRY WATER ADVENTURE PARK, PIGEON FORGE, TN, U.S.	3.1%	437,000	424,000	
18	CEDAR POINT SHORES WATERPARK, SANDUSKY, OH, U.S.	1.9%	420,000	412,000	
19	KNOTT'S SOAK CITY WATER PARK, BUENA PARK, CA, U.S.	1.5%	405,000	399,000	
20	WET 'N WILD EMERALD POINTE, GREENSBORO, NC, U.S.	0.0%	398,000	398,000	
TOP 20 TOTAL ATTENDANCE 2018			16,237,000	15,501,000	
TOP 20 ATTENDANCE GROWTH 2017-18			5.8%	16,237,000	15,346,000

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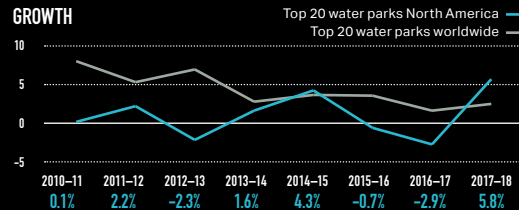
* Adjustment versus the figure we published in last year's report

KEY



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

GROWTH



5.8%

Top 20 water parks North America attendance growth 2017-18

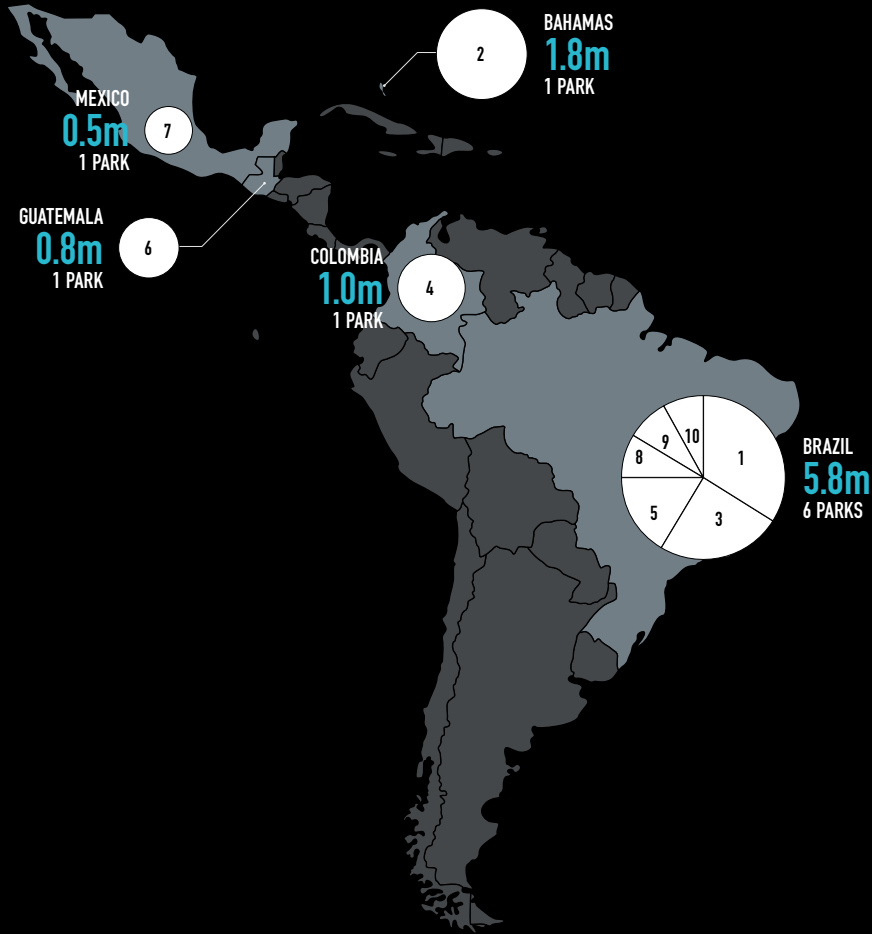
16.2m

Top 20 water parks North America attendance 2018

15.3m

Top 20 water parks North America attendance 2017

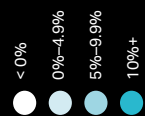
TOP 10 WATER PARKS LATIN AMERICA



RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	PARQUE AQUÁTICO THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	-1.8%	1,971,000	2,007,000
2	AQUAVENTURE ATLANTIS BAHAMAS WATERPARK, PARADISE ISLAND, BAHAMAS	0.0%	1,831,000	1,831,000
3	HOT PARK RIO QUENTE, CALDAS NOVAS, BRAZIL	-3.2%	1,433,000	1,481,000
4	PISCILAGO, GIRARDOT (BOGOTÁ), COLOMBIA	0.1%	990,000	989,000
5	BEACH PARK, AQUIRAZ, BRAZIL	-7.6%	950,000	1,028,000
6	PARQUE ACUÁTICO XOCOMIL, SAN MARTÍN ZAPOTITLÁN, RETALHULEU, GUATEMALA	1.6%	840,000	827,000
7	EL ROLLO PARQUE ACUÁTICO, MORELOS, MEXICO	0.0%	530,000	530,000
8	WET 'N WILD, SÃO PAULO, BRAZIL	5.0%	500,000	476,000
9	THERMAS WATER PARK, SÃO PEDRO, BRAZIL	22.7%	481,000	392,000
10	HOT BEACH, OLIMPIA, BRAZIL	90.1%	462,000	243,000
TOP 10 TOTAL ATTENDANCE 2018			9,988,000	9,804,000
TOP 10 ATTENDANCE GROWTH 2017-18			0.6%	9,933,000

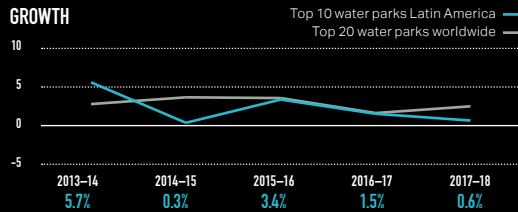
© 2019 TEA / AECOM

KEY



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GROWTH



0.6%

Top 10 water parks Latin America attendance growth 2017-18

10.0m

Top 10 water parks Latin America attendance 2018

9.9m

Top 10 water parks Latin America attendance 2017

ASIA-PACIFIC

3.6%

Top 20 amusement/theme parks Asia-Pacific attendance growth 2017-18

139.1m

Top 20 amusement/theme parks Asia-Pacific attendance 2018

134.2m

Top 20 amusement/theme parks Asia-Pacific attendance 2017



CHRIS YOSHII
Vice President – Economics,
Asia-Pacific



BETH CHANG
Executive Director –
Economics, Asia-Pacific

27.9%

Changzhou China Dinosaurs Park, Changzhou, China, attendance growth 2017-18

Theme parks

ASIA-PACIFIC GROWTH STEADY AT 4%

Theme parks are big

Overall attendance growth was 3.6% in 2018 for the Top 20 Asian theme parks. While exhibiting the volatility of a young industry, the sector is doing very well. The big parks are getting bigger: The larger parks with higher attendance continue to grow fairly rapidly. To make it onto our Top 20 chart, a park needs a minimum of 3.1 million annual attendance, which is substantial.

Negative results in 2018 were often weather-related, or due to a decline in tourism from China. Big increases were attributable to special occasions, new attractions and good marketing strategies.

Regionally and internationally, Disney has readily maintained its position at the top of the list. Disney parks across Asia had a very strong year overall. Tokyo Disneyland and Tokyo DisneySea enjoyed substantial attendance increases in 2018 on top of the previous year's good numbers. The former, in conjunction with its 35th anniversary, rolled out a grand new parade, "Happiest Celebration"; the latter drew visitors with major festivals and seasonal activities such as "Disney Pirates Summer."



Changzhou China Dinosaurs Park
© Changzhou China Dinosaurs Park



Fantawild Asian Legend, Nanning, China
© Fantawild

Hong Kong Disneyland and Shanghai Disneyland also enjoyed substantial growth. The Shanghai park launched programs to help draw in more of the resident market, including its first annual pass. A season pass is a relatively new thing to the market in China, but there are signs that other parks will follow suit.

Behind the numbers: Disney and Chimelong

In the two years since its opening, Shanghai Disneyland has quickly become a standard-bearer for Asia and particularly China. It has set the example for and shown the benefits of high-quality design and content, as well as good operations, and wise management that includes investment in new attractions and programmatic activities. Its influence has led other parks to upgrade their offerings and guest experience, though for the most part, a significant gap remains.

Hong Kong Disneyland opened a new show “Moana: A Homecoming Celebration,” but its attendance increase of 8% for 2018 is also due to a pair of infrastructure improvements that have greatly expanded public access. One is a new high-speed rail line from China to the Hong Kong city center, and the other is the new Hong Kong-Macau-Zhuhai bridge. These new passages also helped stabilize attendance numbers at Ocean Park Hong Kong. Visitors availed themselves of tourist packages that bundled transportation with park admission.

Chimelong Group was another operator whose numbers tell the story of significant growth. In Zhuhai, several factors may be credited for Chimelong Ocean Kingdom’s 2018 attendance increase of over 10%. The park’s nighttime spectacle — the Journey of Lights parade, which was honored with a Thea Award in 2018 — is quite popular.

Ocean Kingdom also opened a new land, reaped exposure from a Chinese New Year TV special shot on-site, and fostered more two-day visits and off-season visits by bundling overnight stays with park admission (the Ocean Kingdom resort has some 4,588 hotel rooms on site.) The new bridge mentioned above was also a significant new gateway to the park.

Chimelong Paradise in Guangzhou, which was one of the earlier Chimelong parks to be built and opened in 2006, has instituted significant upgrades and introduced Halloween events, and been rewarded with a significant (12%) increase in attendance.



A SEASON PASS IS A RELATIVELY NEW THING TO THE MARKET IN CHINA, BUT THERE ARE SIGNS THAT OTHER PARKS WILL FOLLOW SUIT.



7.3%

Shanghai Disneyland, Shanghai, China, attendance growth 2017-18

Shanghai Disneyland, Shanghai, China © Disney



10.6%

Chimelong Ocean Kingdom attendance growth 2017–18

Hero Island, Chimelong Ocean Kingdom, Hengqin, China © Chimelong

New infrastructure and shifting development models

The past 18 months or so have brought a sharp slowdown in new construction projects and the development of new parks in China. This has to do with bank financing and liquidity problems connected to changes in government policy and other economic factors.

In the past, much theme park development in China has been tied to mixed-use real estate projects that involved other elements such as hospitality, retail and residential. The central government recently de-linked park development from residential development, mostly in connection with new projects. The result is that new theme park projects need to be financed on their own; fundamentally a sensible move, but one that has stalled or canceled numerous projects that had been in the pipeline.

The move grew out of concern that theme park projects were being proposed or built simply in order to get approval for residential development.

While these shifts have slowed down new projects for the time being, the promise contained within the change is that new and better development models will emerge that will be good for the industry. Meanwhile, existing parks are doing well.

Ups and downs

Lotte World and Samsung Everland both suffered significant attendance drops, along with other parks in Korea. The reason cited across the board was a decline in tourism from China; for political reasons, Korea has fallen out of favor as a destination from this source market.

Changzhou China Dinosaurs Park (China) raised interest with a recorded 28% jump in attendance. The park is establishing itself as a resort destination with newly developed hotel, RDE commercial and a hot spring spa attraction.

OCT parks generally saw an attendance increase, driven by a first-ever “Cultural Tourism Festival” featuring special events held at OCT attractions across 50 Chinese cities. Looking at the three leading Chinese theme park groups on our charts, OCT shows a 15% attendance jump for 2018, approaching Universal Studios numbers; however, the OCT business model is unique and dependent on this government-owned company’s continued acquisition of small parks and attractions as well as new construction.

Attendance growth follows a more organic pattern at top operators Chimelong and Fantawild. The latter’s attendance numbers jumped by about 9%, supported by opening of two new Fantawild parks in 2017 that have now been operating for a full year. Chimelong has some new parks in the pipeline that we’ll be watching in the near future. Both Chimelong and Fantawild were TEA Thea Awards recipients in 2019.

Water parks

Overall, water park attendance was flat for 2018 in Asia. In this sector, weather is a big factor influencing attendance and there were some big jumps as well as some fairly large drops. Water parks in Korea suffered declines from the slowdown in tourism from China mentioned above.

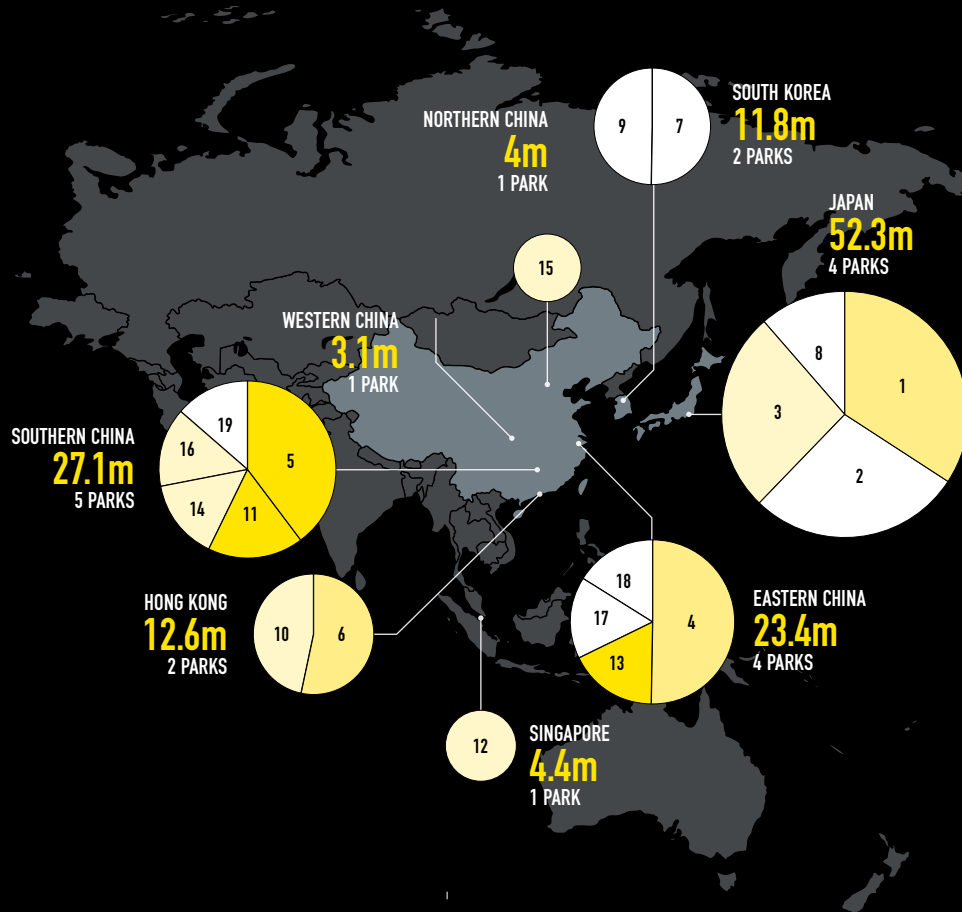
For those water parks that did especially well, discounts and passes played a notable part. OCT offered a popular, cross-visitation, multiple-admission pass — a one-price ticket that admitted the customer to any and all of the OCT water parks and theme parks. This led to a rise in attendance.

NEW OPENING



OCT Tianjin Playa Maya, Tianjin, China © OCT

TOP 20 AMUSEMENT/THEME PARKS ASIA-PACIFIC

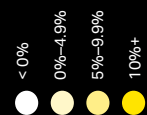


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	7.9%	17,907,000	16,600,000
2	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	8.5%	14,651,000	13,500,000
3	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	-4.3%	14,300,000	14,395,000
4	SHANGHAI DISNEYLAND, SHANGHAI, CHINA	7.3%	11,800,000	11,000,000
5	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	10.6%	10,830,000	9,788,000
6	HONG KONG DISNEYLAND, HONG KONG SAR	8.1%	6,700,000	6,200,000
7	LOTTE WORLD, SEOUL, SOUTH KOREA	-11.2%	5,960,000	6,714,000
8	NAGASHIMA SPA LAND, KUWANA, JAPAN	-0.2%	5,920,000	5,930,000
9	EVERLAND, GYEONGGI-DO, SOUTH KOREA	-7.3%	5,850,000	6,310,000
10	OCEAN PARK, HONG KONG SAR	0.0%	5,800,000	5,800,000
11	CHIMELONG PARADISE, GUANGZHOU, CHINA	11.9%	4,680,000	4,181,000
12	UNIVERSAL STUDIOS SINGAPORE, SINGAPORE	4.3%	4,400,000	4,220,000
13	CHANGZHOU CHINA DINOSAURS PARK, CHANGZHOU, CHINA	27.9%	4,106,000	3,210,000*
14	OCT WINDOW OF THE WORLD, SHENZHEN, CHINA	0.3%	3,990,000	3,980,000
15	OCT HAPPY VALLEY, BEIJING, CHINA	0.8%	3,980,000	3,950,000
16	OCT HAPPY VALLEY, SHENZHEN, CHINA	0.3%	3,910,000	3,900,000
17	ZHENGZHOU FANTAWILD ADVENTURE, CHANGZHOU, CHINA	-0.5%	3,800,000	3,819,000
18	NINGBO FANTAWILD ORIENTAL HERITAGE, NINGBO, CHINA	-2.3%	3,740,000	3,827,000
19	OCT EAST, SHENZHEN, CHINA	-7.1%	3,680,000	3,960,000
20	OCT HAPPY VALLEY, CHENGDU, CHINA	4.4%	3,100,000	2,970,000
TOP 20 TOTAL ATTENDANCE 2018			139,104,000	134,794,000
TOP 20 ATTENDANCE GROWTH 2017-18			3.6%	139,104,000 134,224,000*

© 2019 TEA / AECOM

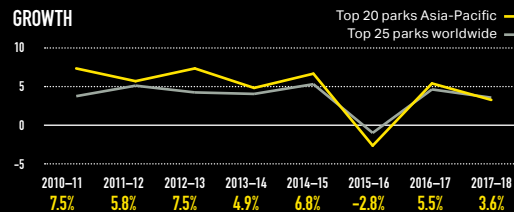
* Adjustment versus the figure we published in last year's report

KEY



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

GROWTH



© 2019 TEA / AECOM

3.6%

Top 20 amusement/theme parks attendance growth Asia-Pacific 2017-18

139.1m

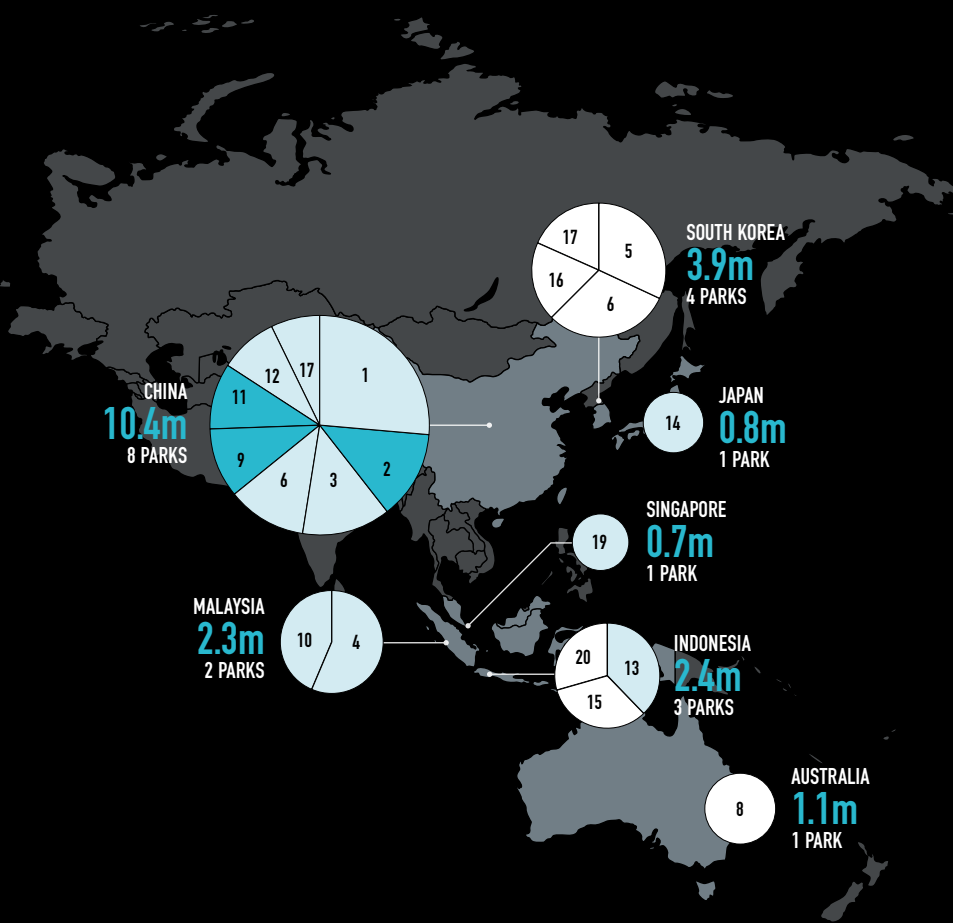
Top 20 amusement/theme parks Asia-Pacific attendance 2018

134.2m

Top 20 amusement/theme parks Asia-Pacific attendance 2017

© 2019 TEA / AECOM

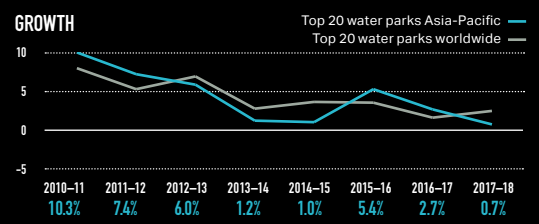
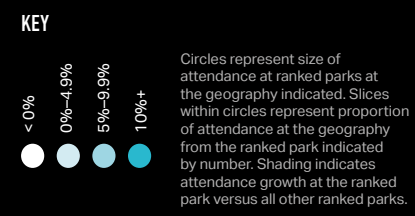
TOP 20 WATER PARKS ASIA-PACIFIC



RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	1.9%	2,740,000	2,690,000
2	WUHU FANTAWILD WATER PARK, WUHU, CHINA	13.3%	1,360,000	1,200,000*
3	KAIFENG YINJI WATER PARK, KAIFENG, CHINA	3.8%	1,350,000	1,300,000
4	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	0.0%	1,300,000	1,300,000
5	OCEAN WORLD, GANGWON-DO, SOUTH KOREA	-5.0%	1,264,000	1,330,000
6	CARIBBEAN BAY, GYEONGGI-DO, SOUTH KOREA	-13.0%	1,200,000	1,380,000
	SHENYANG ROYAL OCEAN PARK — WATER WORLD, FUSHUN, CHINA	0.0%	1,200,000	1,200,000
8	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	-5.1%	1,120,000	1,180,000
9	PLAYA MAYA WATER PARK, WUHAN, CHINA	54.3%	1,080,000	700,000
10	SUNWAY LOST WORLD OF TAMBUN, PERAK, MALAYSIA	0.0%	1,000,000	1,000,000
11	PLAYA MAYA WATER PARK, SHANGHAI, CHINA	11.2%	990,000	890,000
12	ZHENGZHOU FANTAWILD WATER PARK, ZHENGZHOU, CHINA	1.3%	910,000	898,000
13	ATLANTIS WATER ADVENTURE, JAKARTA, INDONESIA	2.5%	907,000	885,000
14	SUMMERLAND, TOKYO, JAPAN	1.0%	820,000	812,000
15	THE JUNGLE WATER ADVENTURE, BOGOR, WEST JAVA, INDONESIA	-14.0%	783,000	910,000
16	LOTTE WATER PARK, GIMHAE, SOUTH KOREA	-6.8%	744,000	798,000
17	WOONGJIN PLAYDOCI WATERDOCI, GYEONGGI-DO, SOUTH KOREA	-18.3%	720,000	881,000
	PLAYA MAYA WATER PARK, TIANJIN, CHINA	NEW	720,000	-
19	ADVENTURE COVE WATER PARK, SINGAPORE	2.9%	700,000	680,000
20	OCEAN PARK WATER ADVENTURE, JAKARTA, INDONESIA	-3.3%	698,000	722,000
TOP 20 TOTAL ATTENDANCE 2018			21,606,000	20,756,000
TOP 20 ATTENDANCE GROWTH 2017-18			0.7%	21,606,000

© 2019 TEA / AECOM

* Adjustment versus the figure we published in last year's report



0.7%

Top 20 water parks Asia-Pacific attendance growth 2017-18

21.6m

Top 20 water parks Asia-Pacific attendance 2018

21.5m

Top 20 water parks Asia-Pacific attendance 2017

© 2019 TEA / AECOM

EMEA

4.4%

Top 20 amusement/
theme parks EMEA
attendance growth
2017–18

65.4m

Top 20 amusement/
theme parks EMEA
attendance 2018

62.6m

Top 20 amusement/
theme parks EMEA
attendance 2017



JODIE LOCK
Associate – Economics,
Asia-Pacific and EMEA

11.5%

Gardaland, Castelnuovo
Del Garda, Italy, attendance
growth 2017–18



Peppa Pig Land, Gardaland,
Castelnuovo del Garda, Italy
© Merlin Entertainments Group

Theme parks

POWER OF THE DESTINATION

**Destination development rules
when it comes to staying at the top
and moving up the ranks of the Top
20 theme parks in Europe.**

While our study encompasses the EMEA region, the parks on our Top 20 list are all mature parks in Europe. For the most part these parks have remained consistent and stable over the past eight years, with moderate ups and downs in attendance depending on reinvestment and other factors. No Middle East parks have yet made it into the Top 20.

5.3m

Walt Disney Studios Park at Disneyland Paris, Marne-La-Vallee, France, attendance 2018

Marvel Summer of Super Heroes, Walt Disney Studios Park at Disneyland Paris, Marne-La-Vallee, France © Disney



Europe — packaging appeals

Disney is the top worldwide operator and the top European operator, and the Disney parks in Paris showed moderate attendance growth and stability in 2018, following a 25th anniversary bump in 2017.

Meanwhile, other top European parks are making their way up the charts, showing off the positive effects of building up their destinations. Europa-Park (Germany), Efteling (Netherlands), Tivoli (Denmark), Gardaland (Italy) and Alton Towers (UK) are among those that did well.

Parque Warner in Madrid displays the biggest attendance increase for a European theme park on our 2018 charts (approaching 19%). This growth is attributed to expansion of the Aquopolis water park, a strong marketing campaign, and a range of packages and “Bono Parques” passes from operator Parques Reunidos that extend a park visit into a multifaceted resort experience.

A park ticket can be bundled with transportation, hotels and other proximate leisure properties operated by Parques Reunidos, including Warner Beach, Parque de Atracciones de Madrid and Zoo Aquarium Madrid.

Merlin Entertainments Group has also benefited from bundling its parks and attractions, and from aggressively reinvesting in its parks. This strategy, along with good weather, proved advantageous in 2018 for Merlin’s UK parks, such as Alton Towers, Chessington World of Adventures, and LEGOLAND Windsor. The popular, new Wicker Man ride and seasonal Scarefest at Alton Towers propelled attention and helped the park recover from the attendance decline of a few years back, which also affected other Merlin-operated theme parks across the UK.

10.5%

Alton Towers, Staffordshire, U.K., attendance growth 2017–18

Wicker Man, Alton Towers, Staffordshire, U.K. © Merlin Entertainments Group



EUROPEAN PARKS ARE MAKING THEIR WAY UP THE CHARTS, SHOWING OFF THE POSITIVE EFFECTS OF BUILDING UP THEIR DESTINATIONS.

In the Netherlands, Efteling continues to do well, with attendance growth of more than 4% in 2018 following a dramatic increase of nearly 9% in 2017, showing how a park can continue to drive attendance in times of stability. Efteling has benefited from season pass sales, overnight stays and the draw of unique new attractions such as Symbolica, a dark ride that opened in 2017 and was honored with a TEA Thea Award.

Outside of Paris, Parc Astérix attendance grew by 8.7% in 2018, reaping the benefits of a 100 million Euro investment plan that rolled out in 2017 and continues through to 2020. This has enabled the park to thrive despite factors negatively impacting other parks in continental Europe. The improvements include a new, 150-room hotel that doubled the park’s accommodation capacity in 2018. The park recently marked a key operations milestone — 50 million visits since opening in 1989 — and is gearing up for 30th anniversary celebrations.



2.3m

Legoland Billund, Denmark, attendance 2018

Legoland Billund, Denmark © Merlin Entertainments Group

Gardaland (Italy) added Peppa Pig Land, based on the popular cartoon pig from the namesake children’s television show. The new land was largely responsible for increasing attendance at the park to 2.9 million. The Peppa Pig IP has proved hugely popular in global markets, achieving near-cult status in some and beloved by adults as well as children.

Futuroscope (France) and Gröna Lund and Liseberg (Sweden), struggled to maintain attendance in 2018, attributed, ironically enough, to the kind of very good weather that makes people head for the great outdoors. The World Cup was also cited as a factor motivating people to seek the great indoors during what is traditionally the parks’ peak season. Futuroscope will likely show a healthy increase in the near future when its new kids’ land opens, with some 21 attractions.



EXPANSION INTO NEW REGIONS WHILE CONTINUING TO BUILD ONE’S CORE OFFERING IS ANOTHER STRATEGY.

PortAventura (Spain) as a destination recorded an impressive 5 million visits for 2018, taking in all three of its separate gates. This comprised 3.65 million visits to the main gate theme park; 350,000 visits to the park’s second gate, water park Caribe Aquatic; and 1 million visits to the new third gate, Ferrari Land, which completed its first full year.

Keys to growth and success

As shown above, when it comes to attendance growth at theme parks in Europe, a broad trend is the increase in overnight stays and the expansion into destinations. Another, familiar trend is acquisition — building up one’s portfolio by acquiring and overhauling smaller, underperforming parks. It’s all about expanding the guest’s options and promoting a longer stay: adding a second (or third) gate, hotel, FEC, adventure park, seasonal event or other variety.

Whether mature theme park markets in Europe need another big theme park is open to question. Compared to Asia and the Middle East, leisure sector investment in Europe is smaller-scale. British parks have done well and attracted many visitors from abroad, with lower relative prices being an advantage.

We’re seeing our big European operators such as Parques Reunidos and Merlin diversifying into different concepts, such as adventure parks and FECs.

FECs will be interesting to watch in the future as a strategy to revitalize shopping centers and retail stores. Retail centers tend to be well located in large urban markets served by transit. Some leisure operators and entertainment companies, including Parques Reunidos and Nickelodeon, have already begun to explore the sector and collaborate on projects.

Expansion into new regions while continuing to build one’s core offering is another strategy. Puy du Fou is a good example, rolling out new attractions in its original park in France while bringing its brand to Spain and exploring options in China as well. The Puy du Fou signature spectacular, grand, theatrical live show ought to adapt well in those markets, if sensitively applied.



2.3m

Puy du Fou, Epesses, France, attendance 2018

Mystère de La Pérouse, Puy du Fou, Epesses, France © Puy du Fou



3.7m

PortAventura,
Salou, Spain,
attendance 2018

Ferrari Land, PortAventura, Salou, Spain
© PortaAventura

Middle East

In Dubai, entertainment and retail operators are gearing up for 2020 in anticipation of the world expo with numerous leisure attractions launching in the run up to expo year. This is a unique market that depends very heavily on tourism for its patronage. And as the UAE builds up its locations as destinations and works on its family-friendly image, year after year attendance is increasing. We see strengthening results from the newer properties such as IMG Worlds of Adventure and the multi-gate Dubai Parks and Resorts as well as the more established Ferrari World Abu Dhabi, and various water parks.

The UAE is best known as a shopping destination for Gulf residents and Europeans who fly in and out, often in the course of a business trip. Yet this region is working to heighten appeal among the global tourist market, with some positive results seen such as the consistent growth in water parks. It will be interesting to see what happens with the Dubai 2020 expo. An expo triggers infrastructure development and a real estate ripple and can go a long way toward building a city or a region's tourism profile, but expos can also prompt domestic tourists and locals to avoid the city during expo year.



SAUDI ARABIA LOOKS SET FOR AN ENTERTAINMENT REVOLUTION AND TO MAKE A BIG ENTRANCE INTO THE THEME PARK MARKET.

At present, the number of visitor attractions in Dubai is large, relative to the size of its market. It is comparable to emerging markets in Asia, such as China, in that it has grown its leisure sector at a very rapid pace, but without the equivalent of China's vast, resident population. This is a more high-risk process than the slower, organic growth that typified mature Western markets such as Orlando.

Another market to watch in the future will be Saudi Arabia. With a vast population, strengthening demographic fundamentals, enabling policy changes, and a significantly under-developed leisure market, it will be interesting to see what transpires from ambitious Government-supported plans to boost tourism and develop theme park mega-projects across the country. Saudi Arabia looks set for an entertainment revolution and to make a big entrance into the theme park market.

Water parks

As mentioned above, good attendance growth was seen at some water parks in the Middle East in 2018. In Dubai, these include Aquaventure, which is on our Top 20 Water Parks Worldwide list (3.5% increase in 2018) and Wild Wadi (3.3% increase in 2018), which is tied for eighth place on our Top 10 EMEA Water parks list, with Aqualand Moravia in the Czech Republic.

Staying competitive in this space means anticipating competition — such as new water parks from IMG Worlds and LEGOLAND — and keeping up accordingly with reinvestment, special events and unique offerings. Aquaventure, for instance, opened a new family area, and hosted after-dark events with entertainment appealing to an adult audience.

Hot weather is always a motivating factor for water park guests in continental Europe, and this was the case in 2018.

Therme Erding in Germany and Tiki Pool in the Netherlands both enjoyed double-digit increases; Therme Erding moved into first place on the Top 10 list with 13.6% growth and Tiki Pool, with 14.3% growth, moved up from #7 to #6 on the list. Germany's Nettebad differentiated itself and broadened its market by cross selling sports and leisure facilities, including an on-site sauna.

As we've seen, a key trend across the market is achieving repeat visitation via such drivers as seasonal events, evening events and season passes, in addition to packages and building destination appeal. Weather can swing either way, either boosting attendance or depressing it. Many operators now compete on the destination level in Europe, and in the Middle East, the destination development model has been in place from the first, with a new property often launched with a hotel and two gates. The hotel is a factor that enhances tracking and a better understanding of guests' needs, and the longer stay supports higher per capita spending.

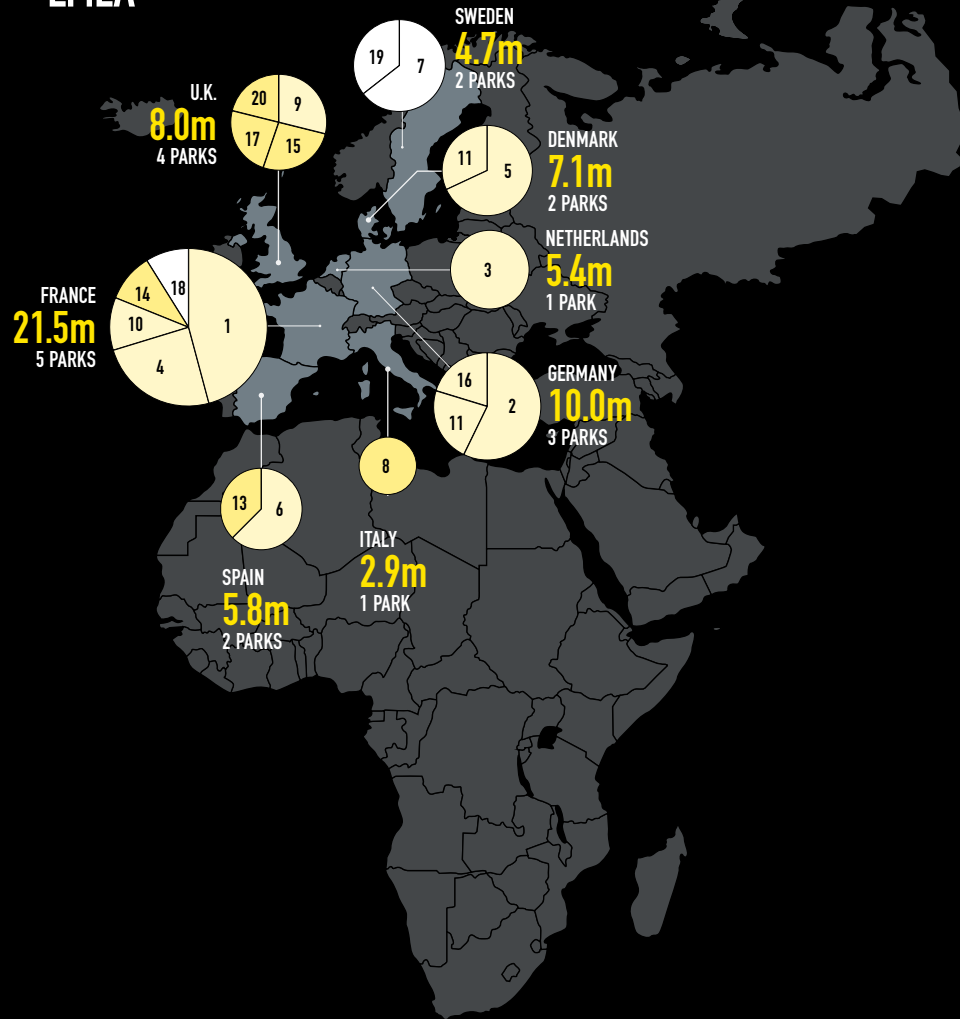


18.8%

Parque Warner,
Madrid, Spain
attendance growth
2017-18

Parque Warner, Madrid, Spain
© Parque Warner

TOP 20 AMUSEMENT/THEME PARKS EMEA

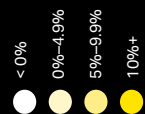


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	1.9%	9,843,000	9,660,000
2	EUROPA PARK, RUST, GERMANY	0.4%	5,720,000	5,700,000
3	DE EFTELING, KAATSHEUVEL, NETHERLANDS	4.2%	5,400,000	5,180,000
4	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	1.9%	5,298,000	5,200,000
5	TIVOLI GARDENS, COPENHAGEN, DENMARK	4.5%	4,850,000	4,640,000
6	PORT AVENTURA, SALOU, SPAIN	0.0%	3,650,000	3,650,000
7	LISEBERG, GOTHENBURG, SWEDEN	-0.2%	3,055,000	3,061,000
8	GARDALAND, CASTELNUOVO DEL GARDA, ITALY	11.5%	2,900,000	2,600,000
9	LEGOLAND WINDSOR, WINDSOR, U.K.	2.9%	2,315,000	2,250,000*
10	PUY DU FOU, LES EPPESSES, FRANCE	2.0%	2,305,000	2,260,000
11	LEGOLAND BILLUND, BILLUND, DENMARK	2.3%	2,250,000	2,200,000*
	LEGOLAND DEUTSCHLAND, GERMANY	4.7%	2,250,000	2,150,000*
13	PARQUE WARNER, MADRID, SPAIN	18.8%	2,185,000	1,840,000
14	PARC ASTERIX, PLAAILLY, FRANCE	8.7%	2,174,000	2,000,000
15	ALTON TOWERS, STAFFORDSHIRE, U.K.	10.5%	2,100,000	1,900,000*
16	PHANTASIALAND, BRUHL, GERMANY	0.3%	2,000,000	1,995,000
17	THORPE PARK, CHERTSEY, U.K.	7.4%	1,880,000	1,750,000*
18	FUTUROSCOPE, JAUNAY-CLAN, FRANCE	-7.5%	1,850,000	2,000,000
19	GRÖNA LUND, STOCKHOLM, SWEDEN	-0.8%	1,676,000	1,690,000
20	CHESSINGTON WORLD OF ADVENTURES, CHESSINGTON, U.K.	9.9%	1,670,000	1,520,000
TOP 20 TOTAL ATTENDANCE 2018			65,371,000	63,246,000
TOP 20 ATTENDANCE GROWTH 2017-18		4.4%	65,371,000	62,596,000

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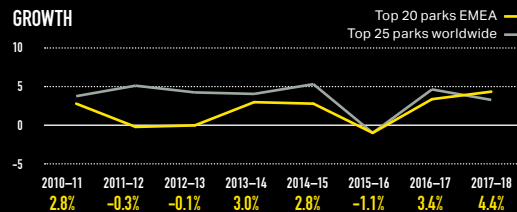
* Adjustment versus the figure we published in last year's report

KEY



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

GROWTH



4.4%

Top 20 amusement/theme parks EMEA attendance growth 2017-18

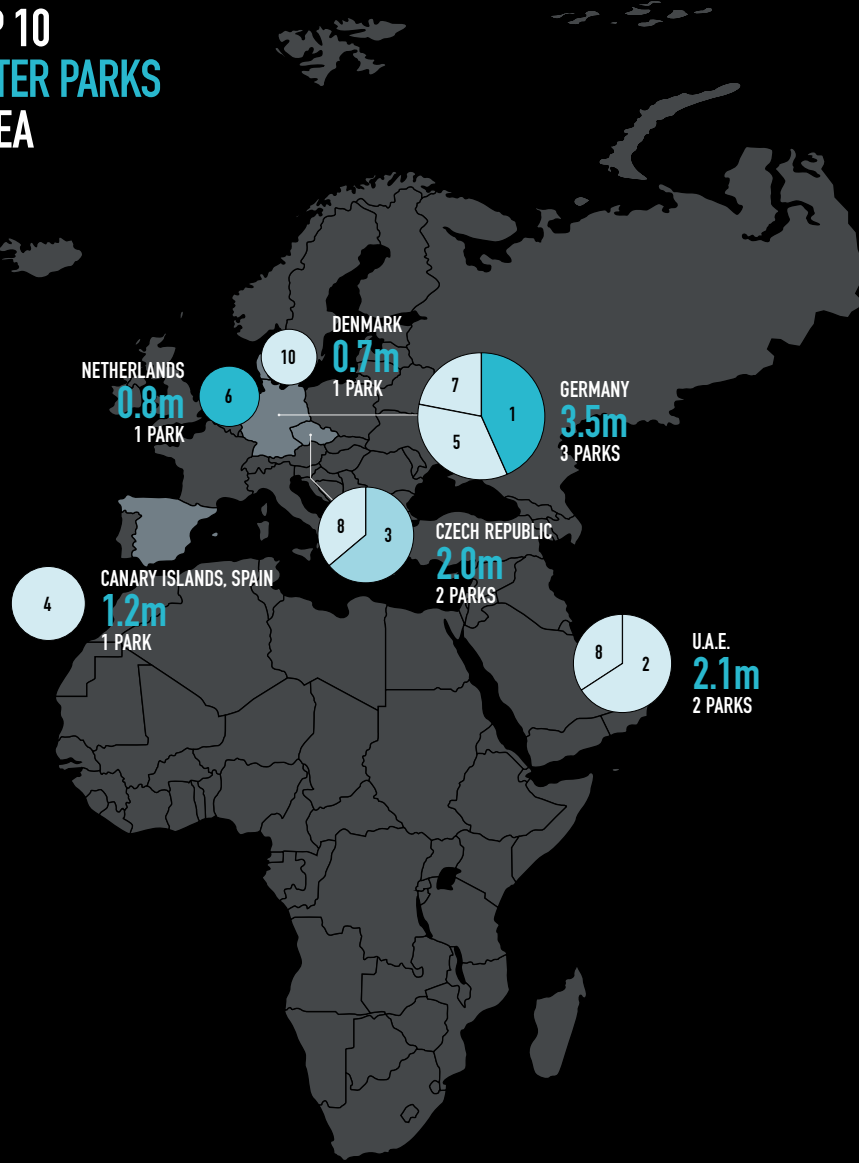
65.4m

Top 20 amusement/theme parks EMEA attendance 2018

62.6m

Top 20 amusement/theme parks EMEA attendance 2017

TOP 10 WATER PARKS EMEA

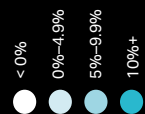


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017
1	THERME ERDING, ERDING, GERMANY	13.6%	1,500,000	1,320,000
2	AQUAVENTURE WATER PARK, DUBAI, U.A.E.	3.5%	1,397,000	1,350,000
3	AQUAPALACE, PRAGUE, CZECH REPUBLIC	6.0%	1,288,000	1,215,000
4	SIAM PARK, SANTA CRUZ DE TENERIFE, SPAIN	0.1%	1,210,000	1,209,000
5	TROPICAL ISLANDS, KRAUSNICK, GERMANY	2.7%	1,200,000	1,168,000
6	TIKI POOL, DUINRELL, THE NETHERLANDS	14.3%	800,000	700,000
7	NETTEBAD, OSNABRÜCK, GERMANY	1.9%	758,000	744,000
8	AQUALAND MORAVIA, CZECH REPUBLIC WILD WADI, DUBAI, U.A.E.	1.1% 3.3%	720,000 720,000	712,400* 697,000
10	LALANDIA, BILLUND, DENMARK	0.3%	682,000	680,000
TOP 10 TOTAL ATTENDANCE 2018			10,275,000	9,795,400
TOP 10 ATTENDANCE GROWTH 2017-18		6.7%	10,275,000	9,633,000

© 2019 TEA / AECOM

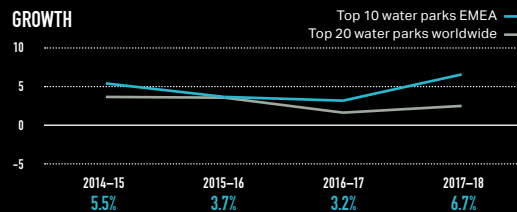
* Adjustment versus the figure we published in last year's report

KEY



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

GROWTH



6.7%

Top 10 water parks EMEA attendance growth 2017-18

10.3m

Top 10 water parks EMEA attendance 2018

9.6m

Top 10 water parks EMEA attendance 2017

MUSEUMS

0.1%

Top 20 museums attendance growth worldwide 2017–18

108.1m

Top 20 museums worldwide attendance 2018

108.0m

Top 20 museums worldwide attendance 2017



LINDA CHEU

Vice President – Economics, Americas

With contributions from **Sarah Linford**, Senior Associate – Economics, Americas, **Beth Chang**, Executive Director – Economics, Asia Pacific and **Jodie Lock**, Associate – Economics, Asia-Pacific and EMEA.

10.2m

Louvre, Paris, France, attendance 2018



Louvre, Paris, France

WORLDWIDE

Around the world, the museum experience is being redefined.

Attendance at the top 20 worldwide museums was relatively stable overall, growing slightly from 108 million in 2017 to 108.1 million in 2018. European museums continue to represent the largest percentage on our Museum Index Top 20 worldwide list, with 9 out of 20 museums and 48% of attendance. Of the others on the list, six museums are in North America and five in Asia.

The Louvre in Paris, France was once again the leader in attendance, with 10.2 million visitors in 2018, a significant increase over last year's 8.1 million. Museums in China also exhibited strong growth, with attendance of those on the Top 20 list growing between 5% and 15%. There was a great deal of volatility among the largest museums in North America, with some experiencing double-digit declines and others seeing significant increases in attendance.

Internationally renowned architect I.M. Pei, who died May 16 at age 102, was best known for designing the 1989 glass Louvre pyramid addition shown here.

Generally, museum attendance continues to be driven by temporary exhibitions, facility improvements or expansions, external market factors, and improvements to competitive museums in the same market. But there are other drivers, too, as museums across geographic sectors are innovating in areas including visitor experiences, exhibitions, and operations.

EUROPE — FINDING NEW AUDIENCES

Temporary exhibitions and geopolitical changes continue to serve as key attendance drivers for museums in Europe, the global market leader. But there are also some new factors including social media and special events.

New drivers include the successful engagement and expanded use of multiple marketing channels, particularly social media platforms. In addition, major museums are modernizing their systems. For example, new online ticketing systems were launched in 2018 at The Louvre in Paris and the Van Gogh Museum in Amsterdam.

The path to continued success and growth for Europe's museums also includes special events and new collaborations with well-recognized celebrities, designers, and relevant IP. Museums are also actively extending their brands and their reach, as well as ancillary revenues, through new locations and traveling exhibitions.



THE PATH TO CONTINUED SUCCESS AND GROWTH FOR EUROPE'S MUSEUMS ALSO INCLUDES SPECIAL EVENTS AND NEW COLLABORATIONS WITH WELL-RECOGNIZED CELEBRITIES, DESIGNERS, AND RELEVANT IP.

The Natural History Museum in London's collaboration with Dippy the Dinosaur (children's character) to deliver touring exhibits is another example of leveraging IP. Known as "Dippy On Tour: A Natural History Adventure," this package of special temporary events and themed exhibitions will be touring multiple locations for a limited time only. The objective is to reach 1.5 million visitors over a three-year period, which preliminary indicators suggest is achievable.

The museum at Auschwitz Birkenau in Poland grew attendance sufficiently to earn a place among the Top 20 museums in Europe for the first time, not an easy feat in this mature market. The museum preserved a Nazi concentration camp to document Holocaust atrocities perpetrated during World War II. Its inaugural appearance in the TEA/AECOM Museum Index is attributed to broad awareness created through social media platforms.

Breaking attendance records

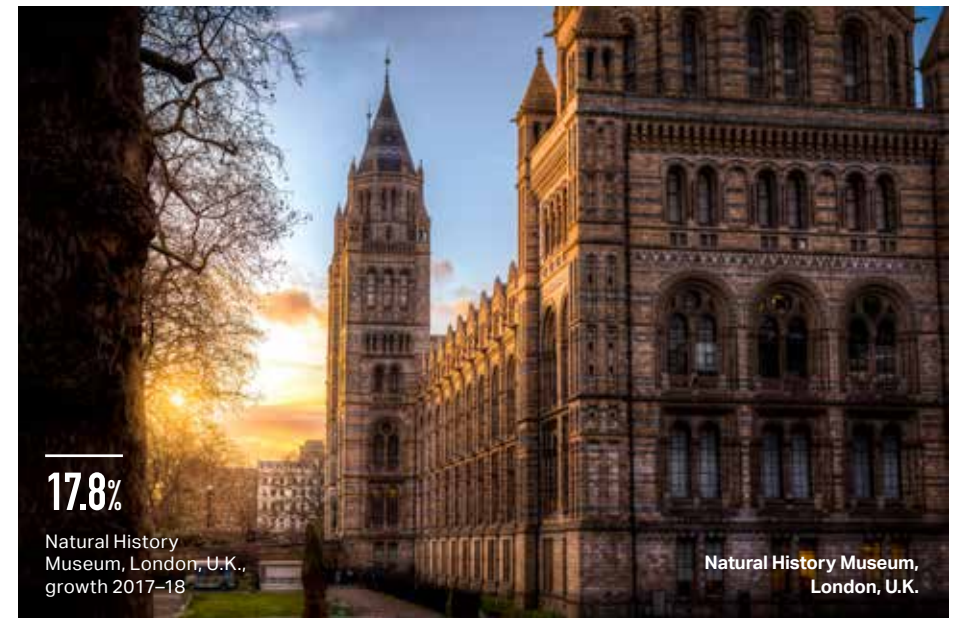
The Musée du Louvre in Paris, already the world's top-attended museum, had a record-breaking year with 10.2 million visits in 2018, smashing its previous record in 2012 of 9.7 million visits. This represents a recovery from the museum's 30% downturn in 2017, a drop largely attributed to a plunge in tourism volumes to Paris during a time of unrest.

Numerous factors contributed to the Louvre's 2018 attendance surge. A social media flurry surrounding Beyoncé and Jay Z's music video being filmed at the museum sparked interest among new markets. This was in line with the museum's goal to reach audiences with limited prior access or exposure to museum culture. During 2018, the Louvre also hosted the most popular temporary exhibition in its history featuring the work of Eugène Delacroix and drawing 540,000 visits.

In a collaboration between the City of Abu Dhabi and the government of France, the Louvre Abu Dhabi, designed by Pritzker Prize honored "starchitect" Jean Nouvel, launched in 2017 and received 1 million visits in its first year. Funds drawn from this agreement supported a €60m investment at the Louvre Paris. This helped boost capacity, online ticketing, and services targeted to the international tourists who comprise 75% of the museum's visitors.

The Natural History Museum, London also enjoyed a record year (17.8% growth to 5.2 million). Attendance was driven by the opening of its re-imagined main gallery Hintze Hall, featuring "Hope," a 25-meter blue whale skeleton suspended from the ceiling. Other attendance boosters came from collaboration on events and products with leading IP, such as Dippy the Dinosaur (see above); Roald Dahl Story Company and LEGO Group, and the addition of a new, 357-seat traditional performance theater. Its peak attendance day in 2018 topped off the year with 28,000 on December 30.

Also in London, the Victoria & Albert Museum broke its prior attendance record with the number of visits up by 178,000 in 2018. Traffic was driven by three, hugely popular temporary exhibitions: "Frida Kahlo: Making Her Self Up," "Winnie the Pooh: Exploring a Classic" and "Balenciaga: Shaping Fashion."



17.8%

Natural History Museum, London, U.K., growth 2017-18

Natural History Museum, London, U.K.

NORTH AMERICA — TRENDS IN THE NUMBERS

Overall attendance at the top 20 museums in North America was relatively stable in 2018, with a decrease from 59.1 million in 2017 to 57.3 million in 2018. In this mature market, changes in attendance are due primarily to the presence or absence of blockbuster exhibits, facility changes, in addition to some external factors.

Most of the volatility in the numbers was seen in Washington, D.C. based institutions. While attendance at most Smithsonian museums was down or flat, there was record attendance of 2.3 million (a major increase of about 1 million) at the Donald W. Reynolds Center for American Art and Portraiture (aka National Portrait Gallery) driven by the exhibition of the new portraits of President Barack Obama and First Lady Michelle Obama, painted by Kehinde Wiley and Amy Sherald.



The National Museum of African American History and Culture (NMAAHC, a past TEA Thea Award recipient) held steady with an impressive 2.4 million visits.

A decrease in attendance of nearly 16% at the National Gallery of Art in D.C. is likely a stabilization impact after a surge in attendance the previous year due to the recently re-opened East Building, in addition to related special events and celebrations. The month-long government shutdown in the U.S. (December 22, 2018 to January 25, 2019) has also been identified by the Smithsonian as a factor related to declines in attendance.

In New York City, “Heavenly Bodies: Fashion and the Catholic Imagination,” which closed in October 2018, was the most-visited exhibition in the Metropolitan Museum of Art’s 148-year history. Organized by the museum’s Costume Institute, it attracted nearly 1.7 million visits over the course of five months and brought total visits for 2018 to 7.4 million, up from 7 million in 2017.

In Chicago, the attendance decline at the Field Museum is likely attributable to the museum having been under repair for much of 2018. In Los Angeles, the California Science Center rang in its 20th anniversary in 2018 with attendance growth of nearly 20%, from 2.1 million in 2017 to 2.5 million in 2018 and a hefty turnout for “King Tut: Treasures of the Golden Pharaoh.” The nine-gallery exhibit presages the centennial of the discovery of the famous tomb and includes multimedia features such as 3D scans of artifacts.



The Rise of Instagram, Pop-Up and Immersive Experiences

The fantastical environments created by the artist collective Meow Wolf in Santa Fe (with new installations coming soon to Denver and Las Vegas). Candytopia, a self-described “outrageously interactive candy wonderland” in Atlanta and Dallas (so far). Wisdom in Los Angeles, with near-religious meditation ceremonies. The Museum of Pizza in New York, where you can see a Totino’s sponsored Pizza Heaven diorama featuring dead pizza rolls in the clouds. The Rosé Mansion (NYC), a “labyrinth of science, history and wine culture.” Human’s Best Friend (NYC), “a pop-up experience for dogs and the humans who love them” where you can bring your dog to be immersed and have over 20 photo opportunities.

These and other cultural experiences are competing with traditional museums for leisure time and dollars. They are artistic, theatrical, musical, often food-oriented and quirky. They tend to “pop-up” in multiple locations, offer immersive environments rich in “Instagrammable” photo ops, attract significant corporate sponsorship, and operate on a for-profit basis. The admission price can be high, with minimal discounting. The visitors are primarily millennials and families, plus a high proportion of social media influencers.

Although repeat visitation tends to be minimal, they attract large numbers of people in very short time frames — in some cases hundreds of thousands of people — with sold-out tickets and long lines. They tend to be oriented toward the use of smartphones and devices. While some are organized by serious artists and are exploring the potential of digital media and technology in art, others are more whimsical and focus on food experiences. They’re an international phenomenon — one of today’s most famous examples is MORI Building teamLab in Tokyo, an immersive digital art experience that was honored in 2019 with a TEA Thea Award, and will soon have a new installation in Brooklyn. There are other examples around the world.

These new kinds of educational and entertaining experiences have become a formidable new category — easy to recognize, but hard to fully define, partly because their business models are evolving. A leading example is the Museum of Ice Cream, which began as a pop-up but has now established a permanent location in San Francisco and sells its own brand of ice cream at Target.

Another trend to watch is the customization and personalization of experiences, through technology, digital media and data collection. The new National Comedy Center in Jamestown, New York, is an example of this. The experience begins with a touchscreen survey where visitors indicate their favorite comedy television shows, movies, and comedians. This information is used to customize the visitor experience and even crowd-source preferences for shared audience experiences. Another example is “David Bowie Is,” an exhibit that uses technology to deliver content individually to the visitor. Museum Hack, a third-party operation that provides unorthodox tours and team building activities in museums across the country, is another example of customizing experiences within museums. These experiences cater to modern visitors and help out-of-home leisure differentiate itself and remain competitive.

ASIA PACIFIC

Chinese museums in 2018 generally performed well with respect to attendance. The National Museum of China in Beijing held onto its first-place position on our list of the Top 20 Museums, Asia Pacific — with 8.6 million visits in 2018, representing a remarkable increase of 550,000 visits over 2017.

Three new Chinese museums entered the Top 20 this year, and double-digit attendance increases were recorded at multiple existing museums across the country, suggesting that governmental initiatives to invest in and boost cultural appreciation are paying off. The Hunan Provincial Museum celebrated its first year of operations after re-opening in a new building and immediately entered our 2018 Top 20, in sixth place.



17%

Suzhou Museum,
Suzhou, China,
attendance growth
2017–18

Suzhou Museum, Suzhou, China



3.6m

Hunan Provincial
Museum, Hunan, China,
attendance 2018

Hunan Provincial Museum,
Hunan, China
© Hunan Provincial Museum

Similar to the Beyoncé effect at The Louvre in Paris, Chinese museums are also looking to celebrity influencers to help drive up attendance. The popular “National Treasure” TV show blends heritage with celebrity sketches and was renewed for a second year in 2018. Participating museums included The Palace Museum, Shanghai Museum, Hunan Provincial Museum and Nanjing Museum, among others.

A trend to watch is foreign museums coming to China. Sea World Culture and Arts Center, opened in Dec. 2017, is a multi-use culture and arts center in Shenzhen. The project is a joint venture between the state-owned China Merchants Group and London’s Victoria & Albert Museum. Later in 2019, Center Pompidou is opening a branch in Shanghai.

The “mediatification” of exhibits is another key direction. Instagrammable media moments are being incorporated at museums to crowd-please those active on social media platforms. Art is being blended into interactive exhibits, allowing visitors to step into, touch, and move through the artwork — and, of course, capture all of this on camera. Immersive exhibits are popular and often incorporate digital media environments, rain rooms, smoke rooms, and mirror rooms.

In Australia, The National Gallery of Victoria had a great year, recording an 11.5% increase for 2018. This was driven by the huge success of the co-curated, temporary exhibition “MoMA at NGV: 130 Years of Modern and Contemporary Art” — the largest Melbourne Masterpieces exhibition the Gallery has ever presented.

11.5%

Tokyo National Museum,
Tokyo, Japan,
attendance growth
2017–18

Tokyo National Museum,
Tokyo, Japan



Moreover, a strong emphasis on summer and evening programming paid dividends, as did a series of initiatives to boost and diversify audience engagement, such as the “NGV Kids Summer Festival,” workshops, and “Friday Nights” social events.

Overall, 11 of the 20 museums featured in our Asia Pacific Top 20 are free-admission. In total, these free museums recorded an overall increase in attendance, while attendance to paid museums slipped by 3.2%. However, we find that this disparity is more due to the location of those museums (as opposed to the existence of an admission fee) and to the relative popularity of 2018 temporary exhibitions as compared to those that ran in 2017.

Taiwanese museums continued to be negatively impacted by a slump in tourism, particularly from China. Most severely affected was the National Palace Museum in Taipei, which experienced a decrease of 13%.



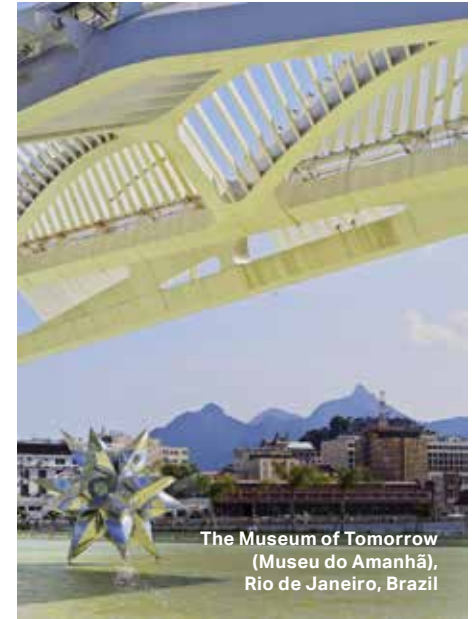
A STRONG EMPHASIS ON SUMMER AND EVENING PROGRAMMING PAID DIVIDENDS.

LATIN AMERICA

There are some instructive and inspiring examples in Latin America’s museum industry, although as of yet no museums from this region appear on our published charts. One is The Museum of Tomorrow (Museu do Amanhã), which opened in Rio de Janeiro in December 2015. The museum, which is approximately 161,000 square feet of exhibit area and nearly five acres of outdoor space, is a new feature on the harbor and was designed by Santiago de Calatrava. The museum has attracted over three million visitors since its opening in December 2015. Rio was home to the 2014 World Cup and the 2016 Summer Olympics, which increased visitation to Rio and its attractions in those years.

Modern in concept, mission and presentation, Museum of Tomorrow is described as an experimental science museum “where the content is presented through a narrative that combines the accuracy of science with the expressiveness of art, using technology as a support in interactive environments and audiovisual and gaming facilities created from scientific studies conducted by experts and data released all over the world.”

The discussion of sustainability is a theme in other new Latin American museums as well. Biomuseo is a 44,000 square foot museum that opened in 2014 with six acres of gardens focused on the natural history of Panama. The museum consists of eight galleries which tell the origin of the Panamanian isthmus and its impact on the planet’s biodiversity. The indoor galleries were designed by Canadian designer Bruce Mau, founder of the Institute Without Boundaries, and the outdoor exhibits were designed by Edwina von Gal.



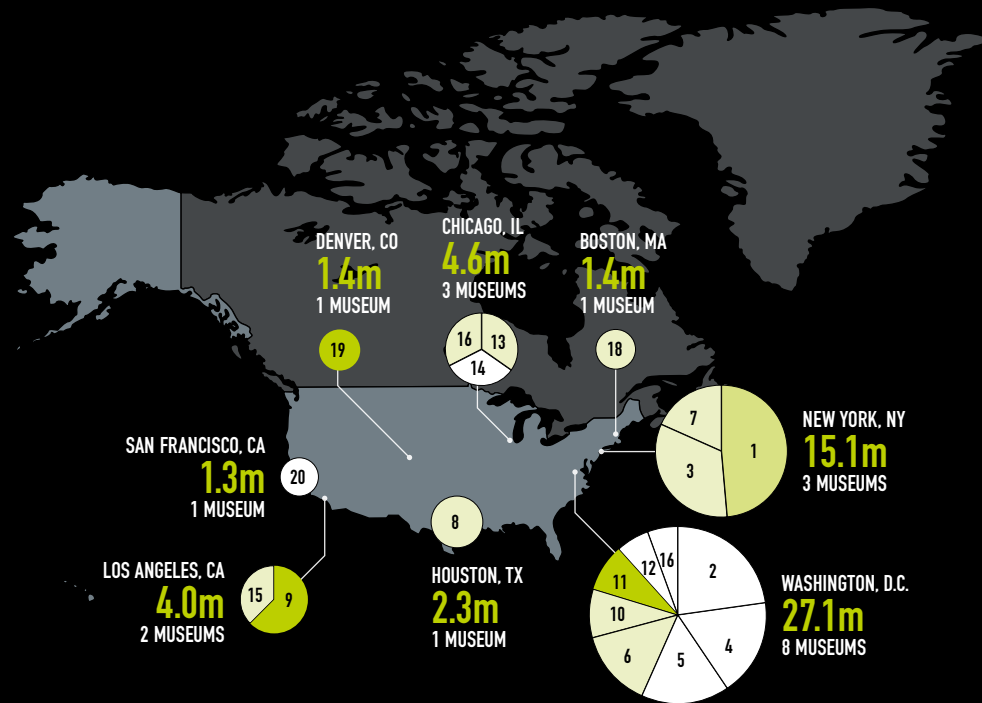
The Museum of Tomorrow
(Museu do Amanhã),
Rio de Janeiro, Brazil

The Biomuseo is a Smithsonian Affiliate, which along with the University of Panama helped develop its scientific content. The Museum highlights scientific research resulting from its partnership between Panama and the Smithsonian Tropical Research Institute.

While most museums in Latin America are government owned and run, a handful of cultural attractions have emerged that are managed by public-private partnerships between government agencies, corporations, and nonprofit organizations or foundations.

We must also speak of the great tragedy of the Brazil National Museum, a 200-year-old natural history museum that was an icon of Rio. The building and most of its 2,000 artifacts were lost in a fire in September 2018.

TOP 20 MUSEUMS NORTH AMERICA

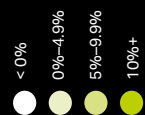


RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	FREE/PAID
1	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	5.1%	7,360,000	7,000,000	P
2	NATIONAL AIR AND SPACE MUSEUM, WASHINGTON, DC, U.S.	-11.4%	6,200,000	7,000,000	F
3	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	0.0%	5,000,000	5,000,000	P
4	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC, U.S.	-20.0%	4,800,000	6,000,000	F
5	NATIONAL GALLERY OF ART, WASHINGTON, DC, U.S.	-15.8%	4,404,000	5,232,000	F
6	NATIONAL MUSEUM OF AMERICAN HISTORY, WASHINGTON, DC, U.S.	0.0%	3,800,000	3,800,000	F
7	THE MUSEUM OF MODERN ART, NEW YORK, NY, U.S.	0.9%	2,774,000	2,750,000	P
8	CALIFORNIA SCIENCE CENTER, LOS ANGELES, CA, U.S.	19.7%	2,520,000	2,106,000	P
9	NATIONAL MUSEUM OF AFRICAN AMERICAN HISTORY AND CULTURE, WASHINGTON, DC, U.S.	0.0%	2,400,000	2,400,000	F
10	HOUSTON MUSEUM OF NATURAL SCIENCE, HOUSTON, TX, U.S.	0.8%	2,313,000	2,295,000	F
11	DONALD W. REYNOLDS CENTER FOR AMERICAN ART AND PORTRAITURE, WASHINGTON, DC, U.S.	76.9%	2,300,000	1,300,000	F
12	U.S. HOLOCAUST MEMORIAL MUSEUM, WASHINGTON, DC, U.S.	-2.9%	1,650,000	1,700,000	P
13	THE ART INSTITUTE OF CHICAGO, CHICAGO, IL, U.S.	0.7%	1,622,000	1,610,000	P
14	FIELD MUSEUM OF NATURAL HISTORY, CHICAGO, IL, U.S.	-15.3%	1,525,000	1,800,000	P
15	THE J. PAUL GETTY CENTER, LOS ANGELES, CA, U.S.	3.9%	1,509,000	1,452,000	F
16	UDVAR-HAZY CENTER, WASHINGTON, DC, U.S.	-6.3%	1,500,000	1,600,000	F
17	MUSEUM OF SCIENCE AND INDUSTRY, CHICAGO, IL, U.S.	0.7%	1,500,000	1,490,000	P
18	MUSEUM OF SCIENCE, BOSTON, MA, U.S.	4.1%	1,458,000	1,400,000	P
19	DENVER MUSEUM OF NATURE & SCIENCE, DENVER, CO, U.S.	11.2%	1,415,000	1,273,000*	P
20	CALIFORNIA ACADEMY OF SCIENCES, SAN FRANCISCO, CA, U.S.	-4.9%	1,295,000	1,362,000	P
TOP 20 TOTAL ATTENDANCE 2018			57,345,000	58,570,000	
TOP 20 TOTAL ATTENDANCE GROWTH 2017-18			-3.0%	57,345,000	59,097,000

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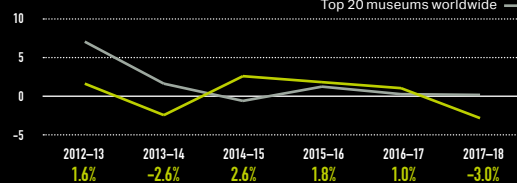
* Adjustment versus the figure we published in last year's report

KEY



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

GROWTH



-3.0%

Top 20 museums North America attendance growth 2017-18

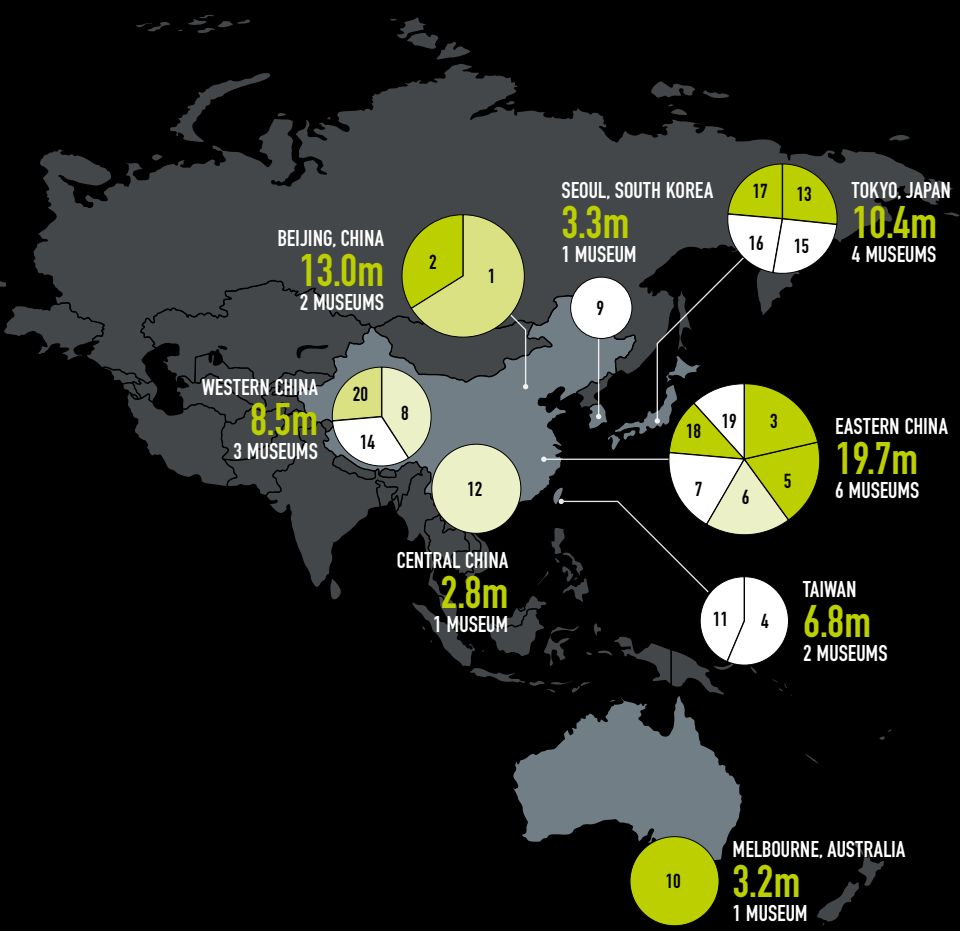
57.3m

Top 20 museums North America attendance 2018

59.1m

Top 20 museums North America attendance 2017

TOP 20 MUSEUMS ASIA-PACIFIC



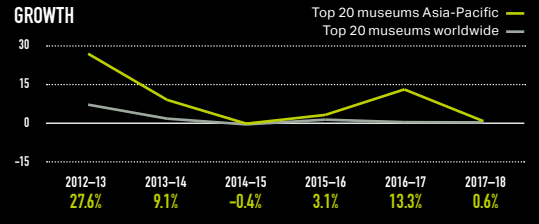
RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	FREE/PAID
1	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	6.8%	8,610,000	8,063,000	F
2	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	10.5%	4,400,000	3,983,000	P
3	ZHEJIANG MUSEUM, HANGZHOU, CHINA	14.4%	4,200,000	3,670,000	F
4	NATIONAL PALACE MUSEUM (TAIWAN), TAIPEI, TAIWAN	-13.0%	3,860,000	4,436,000	P
5	NANJING MUSEUM, NANJING, CHINA	11.2%	3,670,000	3,300,000	F
6	HUNAN PROVINCIAL MUSEUM, HUNAN, CHINA	NEW	3,600,000	-	F
7	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, SHANGHAI, CHINA	-11.1%	3,540,000	3,980,000	P
8	GANSU PROVINCIAL MUSEUM, LANZHOU, CHINA	4.5%	3,500,000	3,350,000	F
9	NATIONAL MUSEUM OF KOREA, SEoul, SOUTH KOREA	-5.1%	3,300,000	3,477,000	F
10	NATIONAL GALLERY OF VICTORIA, MELBOURNE, AUSTRALIA	11.5%	3,200,000	2,869,000	F
11	NATIONAL MUSEUM OF NATURAL SCIENCE, TAICHUNG, TAIWAN	-5.0%	2,960,000	3,115,000	P
12	SHANXI HISTORY MUSEUM, XIAN, CHINA	3.7%	2,800,000	2,700,000	F
13	TOKYO METROPOLITAN ART MUSEUM, TOKYO, JAPAN	2.4%	2,790,000	2,724,000	P
14	CHENGDU MUSEUM, CHENGDU, CHINA	-7.3%	2,780,000	3,000,000	F
15	NATIONAL ART CENTER, TOKYO, JAPAN	-8.9%	2,720,000	2,987,000	P
16	NATIONAL MUSEUM OF NATURAL SCIENCE, TOKYO, JAPAN	-5.4%	2,460,000	2,600,000	P
17	TOKYO NATIONAL MUSEUM, TOKYO, JAPAN	11.5%	2,430,000	2,180,000	P
18	SUZHOu MUSEUM, SUZHOU, CHINA	17.0%	2,340,000	2,000,000	F
19	CHINA ART MUSEUM, PUDONG XINQU (SHANGHAI), CHINA	-9.8%	2,300,000	2,550,000	P
20	CHINA THREE GORGES MUSEUM, CHONGQING, CHINA	6.1%	2,240,000	2,112,000	F
TOP 20 TOTAL ATTENDANCE 2018			67,700,000	63,096,000	
TOP 20 TOTAL ATTENDANCE GROWTH 2017-18			0.6%	67,700,000	67,322,000

© 2019 TEA / AECOM

KEY

- <0%
- 0%-4.9%
- 5%-9.9%
- 10%+

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



0.6%

Top 20 museums Asia-Pacific attendance growth 2017-18

67.7m

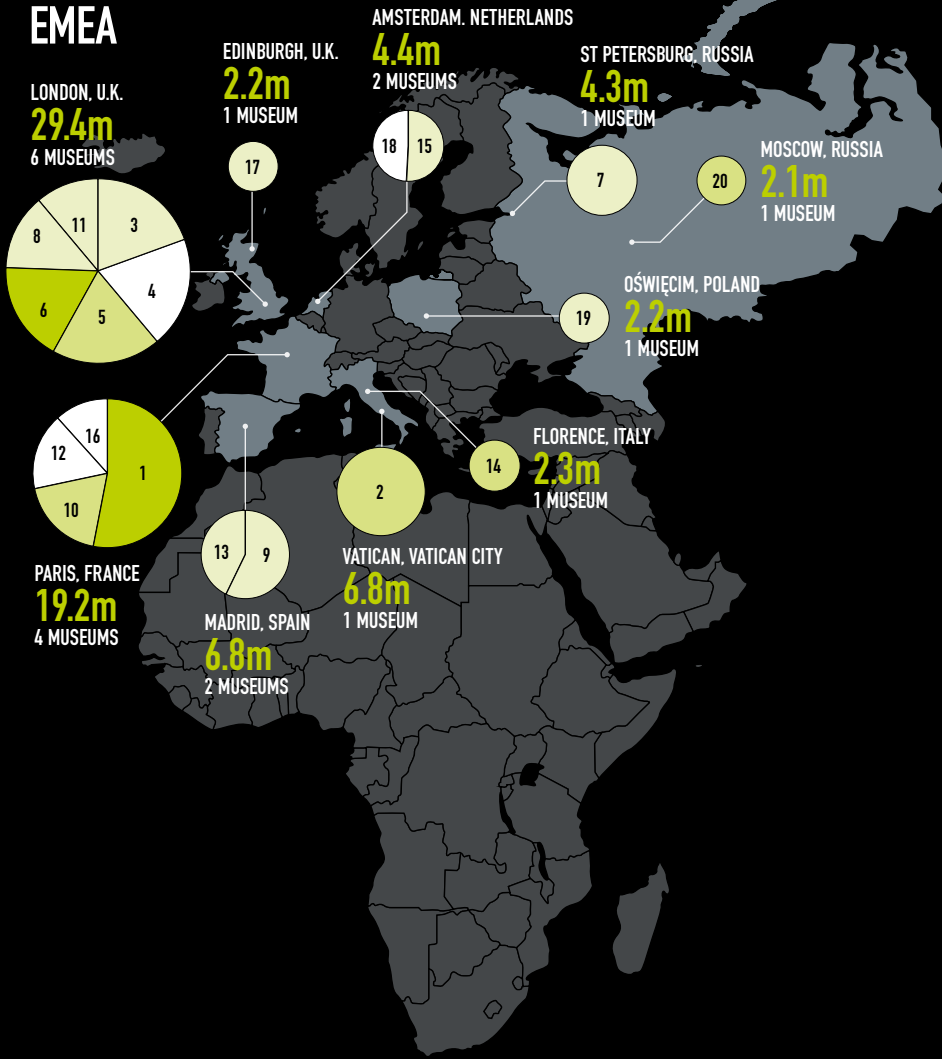
Top 20 museums Asia-Pacific attendance 2018

67.3m

Top 20 museums Asia-Pacific attendance 2017

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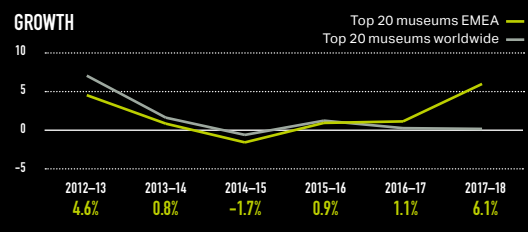
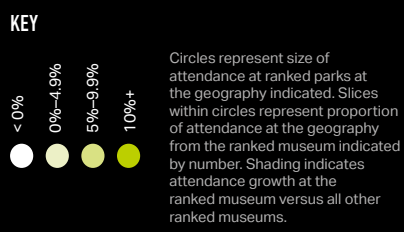
TOP 20 MUSEUMS EMEA



RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2018	ATTENDANCE 2017	FREE/PAID
1	LOUVRE, PARIS, FRANCE	25.9%	10,200,000	8,100,000	P
2	VATICAN MUSEUMS, VATICAN, VATICAN CITY	5.1%	6,756,000	6,427,000	P
3	BRITISH MUSEUM, LONDON, U.K.	3.8%	5,869,000	5,656,000	F
4	TATE MODERN, LONDON, U.K.	-1.3%	5,829,000	5,907,000	F
5	NATIONAL GALLERY, LONDON, U.K.	9.7%	5,736,000	5,229,000	F
6	NATURAL HISTORY MUSEUM, LONDON, U.K.	17.8%	5,226,000	4,435,000	F
7	STATE HERMITAGE, ST PETERSBURG, RUSSIA	1.8%	4,294,000	4,220,000	P
8	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	4.7%	3,968,000	3,790,000	P
9	REINA SOFÍA, MADRID, SPAIN	0.0%	3,898,000	3,897,000	F
10	CENTRE POMPIDOU, PARIS, FRANCE	5.4%	3,552,000	3,371,000	P
11	SCIENCE MUSEUM (SOUTH KENSINGTON), LONDON, U.K.	3.4%	3,286,000	3,178,000	P
12	MUSÉE D'ORSAY, PARIS, FRANCE	-2.3%	3,175,000	3,251,000	F
13	MUSEO NACIONAL DEL PRADO, MADRID, SPAIN	2.4%	2,893,000	2,824,000	P
14	GALLERIA DEGLI UFFIZI, FLORENCE, ITALY	7.9%	2,330,000	2,160,000	P
15	RIJKSMUSEUM, AMSTERDAM, THE NETHERLANDS	1.8%	2,300,000	2,260,000	P
16	CITE DES SCIENCES ET DE L'INDUSTRIE, PARIS, FRANCE	-0.2%	2,231,000	2,235,000*	P
17	NATIONAL MUSEUM OF SCOTLAND, EDINBURGH, U.K.	2.9%	2,228,000	2,166,000	F
18	VAN GOGH MUSEUM, AMSTERDAM, THE NETHERLANDS	-9.6%	2,206,000	2,439,000	P
19	AUSCHWITZ-BIRKENAU MUSEUM, OŚWIĘCIM, POLAND	2.5%	2,152,000	2,100,000	P
20	STATE TRETYAKOV GALLERY, MOSCOW, RUSSIA	6.2%	2,149,000	2,024,000	P
TOP 20 TOTAL ATTENDANCE 2018			80,278,000	75,669,000	
TOP 20 TOTAL ATTENDANCE GROWTH 2017-18			6.1%	80,278,000	75,634,000

© 2019 TEA / AECOM

* Adjustment versus the figure we published in last year's report



6.1%
Top 20 museums EMEA attendance growth 2017-18

80.3m
Top 20 museums EMEA attendance 2018

75.6m
Top 20 museums EMEA attendance 2017

OBSERVATION EXPERIENCES

SPECIAL FEATURE



BRIAN SANDS

Vice President / Director –
Economics, Americas



KATHLEEN LACLAIR

Associate Principal –
Economics, Americas

6.4m

Tokyo Skytree, Tokyo,
Japan, attendance: 2018

Observation Experiences

ON TOP OF THE WORLD

Observation experiences are a type of specialty attraction proliferating across the globe. This growth is driven primarily by a combination of increasing urbanization, technology improvements allowing for higher building heights as well as faster and more reliable mechanical systems, and the realization by developers and operators that they can provide significant revenue. In the best cases, they have iconic architecture and become “must-do” visitor experiences, helping to create a symbol for a city or region.

The diversity of design in the top 20 observation experiences worldwide is notable. It includes observation decks in purpose-built towers and in multi-use buildings (which may include retail, office, and residential uses), wheels that hark back to the original Ferris wheel (designed and constructed by George Washington Gale Ferris Jr. as a landmark for the 1893 World’s Columbian Exposition in Chicago), as well as a religious monument and a cable car.

Tokyo Skytree,
Tokyo, Japan

Ever since people have had the chance to get above their immediate surroundings, such as on a high building or a mountaintop, they have enjoyed the view, thinking about the meaning of what they saw, and daydreaming about visiting all they see. The Eiffel Tower, opened in Paris as the centerpiece of the 1889 Universal Exposition, was perhaps the first notable gated observation experience in the world. It remains a very popular icon, with recent attendance ranging between 6 million and 7 million annually.

With 6.4 million annual visits, the Tokyo Tree is the most-attended observation experience globally, which by comparison would place it near the middle of the most-attended theme parks globally. The Empire State Building and the London Eye, both at around 4 million visitors annually, are also very popular and iconic observation experiences. Notably, the combined annual attendance at the top 20 observation experiences worldwide of nearly 53 million surpasses by a wide margin the total for the top 20 water parks worldwide, though it is approximately one-half of the total for the top 20 museums worldwide.

With the right combination of factors — such as location, adjacent or nearby attractions and other uses, quality and uniqueness of the visitor experience, pricing, market size and characteristics, and competitive position — these specialty attractions can also generate significant revenue. For example, the Empire State Building reported \$131 million in revenue from its observatory in 2018.

That said, as these attractions proliferate across urban markets globally, and particularly as multiple observation experiences compete in the same market, there is growing concern about the likely performance of the new experiences as well as existing ones.

Recently, the Economics practice at AECOM has worked on a number of proposed new observation experiences in major markets with multiple existing well-established observation attractions, such as the soon-to-open Edge at Hudson Yards in New York City, which will be competing head-to-head with the Empire State Building, Top of the Rock, and One World Observatory (a TEA Thea Award recipient in 2016) as well as several others under construction or in-planning.

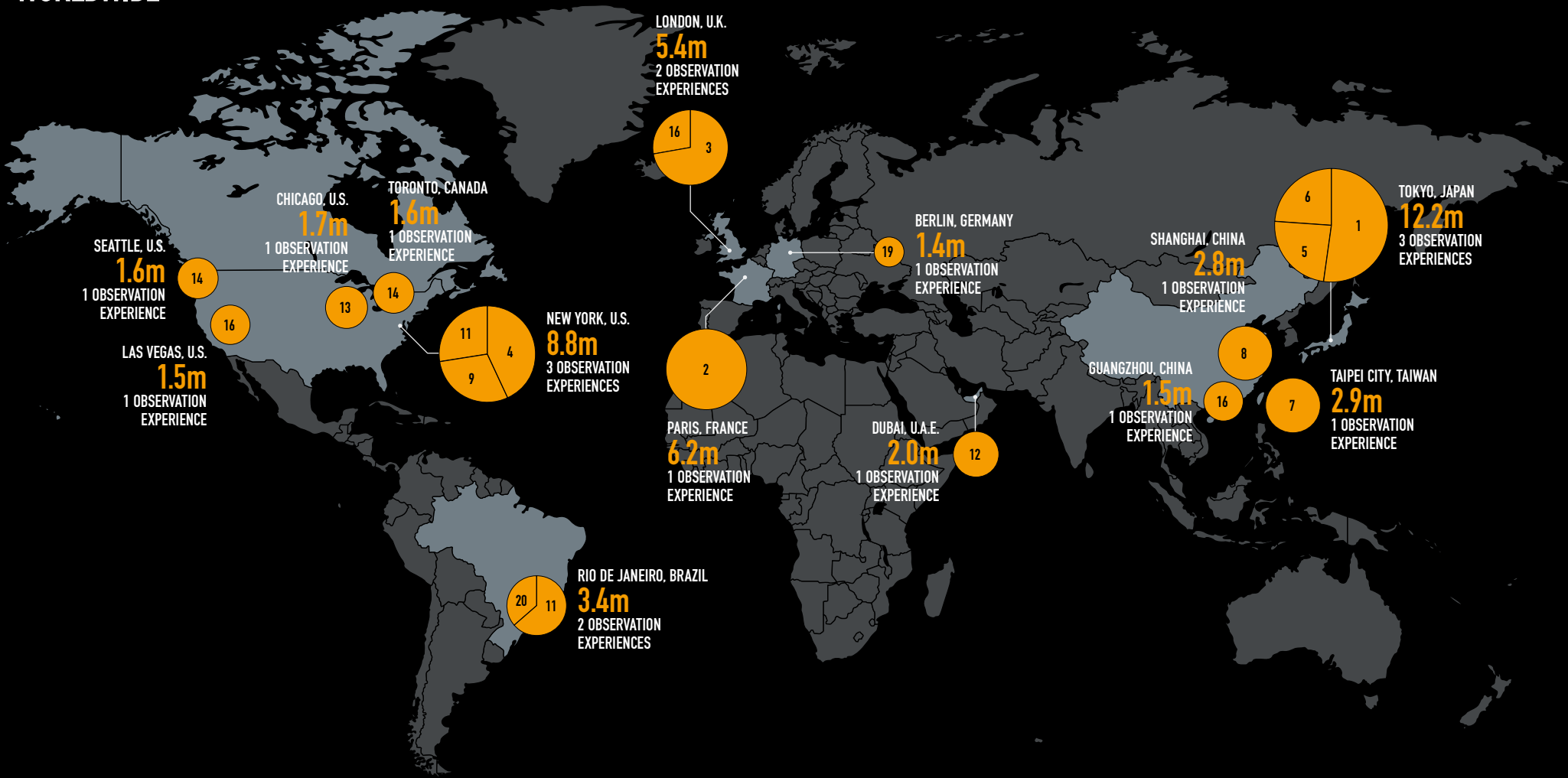


Our analyses reveal that when attendance at these attractions within a market is combined (also known as aggregated attendance), they are able to capture one-fifth to one-quarter of the combined resident and tourist markets. Given the large size of these markets, and the relatively small physical size of the attractions and the generally short length of stay for visitors, this is a remarkable achievement.

As the competition increases in these markets, it will be interesting to see what kinds of innovations occur in the visitor experience that helps to keep them fresh and fun for new and returning visitors.



TOP 20 OBSERVATION EXPERIENCES WORLDWIDE



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked museum indicated by number.

53.0m

Top 20 observation experiences worldwide 2018

TOP 20 OBSERVATION EXPERIENCES WORLDWIDE

RANK	ATTRACTION LOCATION	OBSERVATION EXPERIENCE TYPE	ESTIMATED ATTENDANCE 2018
1	TOKYO SKYTREE, TOKYO, JAPAN	TOWER	6,400,000
2	EFFEL TOWER, PARIS, FRANCE	TOWER	6,207,000
3	COCA-COLA LONDON EYE, LONDON, U.K.	WHEEL	3,900,000
4	EMPIRE STATE BUILDING, NEW YORK, NY, U.S.	MULTI-USE	3,805,000
5	TOKYO TOWER, TOKYO, JAPAN	TOWER	2,920,000
6	TOKYO CITY VIEW, TOKYO, JAPAN	MULTI-USE	2,900,000
7	TAIPEI 101, TAIPERI CITY, TAIWAN	MULTI-USE	2,880,000
8	ORIENTAL PEARL, SHANGHAI, CHINA	TOWER	2,800,000
9	TOP OF THE ROCK, NEW YORK, NY, U.S.	MULTI-USE	2,600,000
10	ONE WORLD OBSERVATORY, NEW YORK, NY, U.S.	MULTI-USE	2,400,000

RANK	ATTRACTION LOCATION	OBSERVATION EXPERIENCE TYPE	ESTIMATED ATTENDANCE 2018
11	CHRIST THE REDEEMER, RIO DE JANEIRO, BRAZIL	MONUMENT	2,200,000
12	AT THE TOP – BURJ KHALIFA, DUBAI, U.A.E.	MULTI-USE	2,000,000
13	WILLIS TOWER SKYDECK, CHICAGO, IL, U.S.	MULTI-USE	1,652,000
14	CN TOWER, TORONTO, ONTARIO, CANADA	TOWER	1,600,000
	SPACE NEEDLE, SEATTLE, WA, U.S.	TOWER	1,600,000
16	CANTON TOWER, GUANGZHOU, CHINA	MULTI-USE	1,500,000
	HIGH ROLLER, LAS VEGAS, NV, U.S.	WHEEL	1,500,000
	SKY GARDEN, LONDON, U.K.	MULTI-USE	1,500,000
19	BERLINER FERNSEHTURM, BERLIN, GERMANY	TOWER	1,350,000
20	SUGARLOAF CABLE CAR, RIO DE JANEIRO, BRAZIL	RIDE	1,249,000
TOP 20 ATTENDANCE 2018			52,963,000

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53.0m

Top 20 observation experiences
worldwide 2018

ABOUT THE STUDY

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

This is the thirteenth 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. The report represents a significant body of international research and annual tracking.

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 and TEA hear 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-Pacific.

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 in the top theme park groups list, an operator must have theme parks in its portfolio in which it has controlling ownership or that are branded by the operator (i.e., licensed).

Due to differences in reporting across operators and regions, there is some variation in the time periods for which figures are reported. Unless otherwise noted, figures for North America and Europe are calendar year figures, while most figures for Asia-Pacific are fiscal year figures. In Asia-Pacific, for those parks/museums with a fiscal year ending from June 30th to December 31st, we use the current fiscal year number in our tables, while for those parks/museums with a fiscal year ending early in the year, for example on March 31st, we use the following fiscal year number in our tables. By way of example, Ocean Park Hong Kong fiscal year ends June 30, 2018, so we use fiscal year 2018 in our 2018 table, while Tokyo Disneyland's fiscal year ends on March 31, so we use fiscal year 2019 in our 2018 table.

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 professional estimate. It's 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 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 60-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; 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.

to help correctly position and right-size parks and museums to match their market potential and optimize their financial performance. In addition, we regularly speak at industry events, such as those organized by TEA, IAAPA, WWA, AAM, AZA, ULL, and many others, about industry trends, and also contribute to articles to industry publications and in more general media publications.

What causes wide swings in performance at parks and museums?

As can be seen from the process outlined above, there are many 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. If a water park also has a separate spa facility, only the entertainment-related attendance is factored into our study.

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.

Why do you focus on the top-attended parks and museums?

The top-attended parks and museums are a clear indicator of the overall state of the industry and associated trends. In addition, trends and activities at the top-attended parks and museums signal both what is currently occurring in the industry more broadly, as well as what is likely to occur in the future, particularly in such areas as investment, technology, IP, marketing, facility spending, visitor spending and behavior. This is also why the top-attended parks and museums tend to be the most-watched by the media as well as the industry. The report currently lists more than 200 parks and museums, the result of a significant research, tracking and evaluation effort on the part of our team.

Can we assume that the same dynamic of the top parks is playing out in the smaller parks and museums?

Generally, the answer is yes, with attractions of all types and scales facing many of the same ongoing challenges, which include meeting visitor expectations, hiring and retaining good management and staff, efficient operations, understanding and applying new technology, addressing the need for continuous reinvestment, and the like. That said, smaller and more regional venues have their own unique place in the market. They have distinct challenges when it comes to marketing, investment and guest retention, making the most of smaller budgets, and differentiating themselves from other leisure options competing for visitors' time and money. How they respond to those challenges often sets an example of creativity, innovation, leadership and/or economic stimulus that influences the rest of the sector — many such examples have appeared in the annual slate of TEA Thea Awards recipients over the years.

How do you account for the performance of operators of numerous smaller attractions that don't make the lists, but that are still large operators?

The two operators that most readily come to mind here are Merlin Entertainments Group and Parques Reunidos, both of which do make the Top 10 Theme Park Groups Worldwide list. In the case of Merlin Entertainments Group, they are the second most attended operator globally with attendance of 67.0 million in 2018, around one-third of which occurred at larger parks, with most of these located in the EMEA region (e.g., LEGOLAND Windsor, LEGOLAND Billund, Alton Towers, etc.). However, about two-thirds of Merlin's attendance occurs in mid- and small-size attractions, particularly at "midway" attractions, most of which are situated in highly trafficked locations in well-known locations, particularly top tourist destinations, with highly recognized individual brands (e.g., Madame Tussauds, SeaLife, the Dungeons, etc.). Similarly, with 20.9 million visitors in 2018, Parques Reunidos was the tenth most attended operator globally, with a strategy of focusing largely on a wide variety of attraction types, including amusement parks, zoos, aquariums, and IECs, primarily located in the EMEA region, but with a growing portfolio in North America (via its subsidiary Palace Entertainment). Clearly both Merlin Entertainments and Parques Reunidos have developed effective strategies to attract large numbers of visitors overall to their respective attraction portfolios, but a combination of factors such as their location, focus, and scale, inhibits most of their properties from reaching levels for inclusion in the Theme Index.

- 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 refine 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

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

About AECOM

AECOM is built to deliver a better world. We design, build, finance and operate critical infrastructure assets for governments, businesses and organizations. 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 \$20.2 billion during fiscal year 2018. See how we deliver what others can only imagine at aecom.com and [@AECOM](https://twitter.com/AECOM).

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About the Themed Entertainment Association (TEA)

Through its activities in the global themed entertainment community, TEA leads the conversation about how great guest experiences are conceived and realized, and helps focus attention on themed entertainment as a vital niche of popular culture, and its essential role in global economic development. As a nonprofit membership association representing the creators of compelling places and experiences worldwide, TEA encompasses some 1,700 member companies and produces a full calendar of conferences and events including the prestigious, annual TEA Thea Awards. TEA was founded in 1991 and is headquartered in the Los Angeles area.

Visit www.teaconnect.org. On Twitter: [@TEA_Connect](https://twitter.com/TEA_Connect).

This version of the Theme and Museum Index and previous versions back to 2006 can be downloaded at the following links:

aecom.com/theme-index
teaconnect.org/resources/theme-index