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THEME PARKS AND ATTRACTIONS IN SINGAPORE: AN OVERVIEW

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ABSTRACT

Singapore attracted almost 7 million visitors in 1994. Receipts from tourists also accounted for about 10 percent of the gross national product. As a small island of only 640 square kilometers, Singapore has almost no natural scenery to offer. Many of its tourism attractions are man-made and theme parks play an important role in attracting visitors not only from abroad but also locally. This paper aims to describe the local theme park industry and examine its problems and prospects. It is found that the theme parks in Singapore will face stiff competition, not only from each other, but also from the region where theme park development projects are abound. The changing environment also dictates that these theme parks will have to be innovative and must attempt to accommodate the changing needs of the visitors in order to stay viable.

INTRODUCTION

Singapore attracted 6.9 million of tourists in 1994, an increase of almost 30 percent from the 5.32 million achieved in 1990. Tourist

receipts for 1994 reached S\$10.9 billion. This is about 10 percent of the gross national product of S\$104.9 billion generated in the same year. This is quite remarkable given the fact that Singapore is only a small island with about 640 square kilometers of land and has no natural scenery to offer, although several of its smaller outlying islands are also developed for tourism purposes.

Tourism is an important industry to Singapore. According to the Report of the Tourism Task Force published by the Singapore Ministry of Trade and Industry (1984), tourism was considered as a major export industry and its role in the Singapore economy would continue to be emphasized. Several measures were proposed by the report in enhancing the attractiveness of Singapore as a tourist destination. These included improving existing attractions such as the restoration of Chinatown and other historical and tourist sites. The other strategy was to develop new attractions. In the strategic plan 1993-95 developed by the Singapore Tourist Promotion Board, the importance of developing new directions in product development was again emphasized. Eleven tourism themes were proposed. One

of the themes was related to the development of family theme parks. The aim was to cater to the increasing numbers of families visiting Singapore.

According to Milman (3), theme parks attempt to "create an atmosphere of another place and time, and usually emphasize one dominant theme around which architecture, landscaping, costumed personnel, rides, shows, food services, and merchandise are coordinated". In addition, theme parks are designed mainly to cater to the family as a visiting unit. In this paper, theme parks are classified primarily according to entertainment, historical, and safari parks but other attractions are also described to provide an overview of the competitive market situation in this industry in Singapore.

THEME PARKS AND ATTRACTIONS

The theme parks and attractions in Singapore can be divided into five different categories. These are (1) islands; (2) wild life; (3) theme parks; (4) museums and (5) gardens and parks. In this section, the main tourist island--Sentosa will be described as it has several of the theme parks located there. The other three attractions with animal themes, other than the zoo, will also be discussed.

Sentosa Island

Sentosa Island is the most popular tourist attraction in Singapore. It lies just half a kilometer south of the mainland Singapore. It was previously a fishing village and later used as a fortress and a British military base until 1967 when the British decided to withdraw its forces from Singapore. When it was handed back to the Singapore

government, various proposals were put forward to develop the island, ranging from using it as industrial or military site, a port or to manage it as a tourism development.

Sentosa (a Malay word for peace and tranquillity) is now a holiday resort island with lush tropical flora and many attractions to lure the tourists. It can be reached from mainland Singapore by ferry, coach or cable car. Visitors can also walk or cycle to the island. The island has various attractions, facilities and activities to keep both families and individuals engaged. In fact, three of the theme parks in Singapore are located in this island alone. These three are the Asian Village, Fantasy Island and Volcanoland. The other attraction is the Underwater World. Each of these will be described in detail.

Asian Village

Asian Village, as its name implies, is a S\$75 million waterfront theme park that attempts to showcase the multi-cultural and architectural heritage of countries in East Asia, South-East Asia and South Asia. It has three theme villages constructed around a landscaped lake. Each of these three villages is distinct on its own and aims to provide an authentic imitation of the different regions it represents.

The Asian Village occupies an area of about 8 hectares. In the village, there is an adventure park that features 11 theme rides for visitors of all ages. Within the lush and beautiful surroundings, one can also find open air bazaars and Thai floating markets, accompanied by the different types of Asian music to complement the different regions it represents. There is also an amphitheater which can accommodate 1200 people.

Within each of the theme villages, there are shops that sell Asian wares such as Burmese lacquer ware, Chinese painting and pottery and so on. Apart from these merchandise, the Asian Village also features fine cuisine from the different regions of Asia. There are also cultural shows to depict the lives and cultures from the different regions. Performers and craftsmen such as Indian sculptors, Chinese calligraphers and Filipino artists have also been hired to showcase the regions in each of the villages.

When the Village was first opened to the public, an admission charge of about S\$10 was imposed. However, the management found that many people avoided going to the Village. Finally, admission charge was waived. However, visitors are required to pay for rides in the village, ranging from S\$1 to S\$3 each time. Visitors can also pay S\$10 to get unlimited rides. In 1994, the Asian Village attracted 1,018,000 visitors out of a total of 4 million visitors who toured the Sentosa Island. It was ranked as Sentosa's top five attractions for that year.

Fantasy Island

Fantasy Island is a S\$52-million development located in Sentosa. It is reputed to be the largest water theme park in the region. It has about 32 slides and promised to offer both passive and exciting rides for different types of customers. In addition to the rides, there are also restaurants and pubs. It occupies an area of about 71,000 square meters, equivalent to about 56 Olympic-sized swimming pools. About 6.3 million liters of water are needed for the park's water slides. The biggest of which is called the Subaru, which lets the visitors slide down at a very fast speed. There are also sharp drops, serpentine-shaped slides, river rapids and so

forth which provide thrill and excitement for the families.

The theme park is opened from 9.30 a.m. to 7 p.m. and admission charge is S\$16 for adults and S\$10 for children under 12. Before entering the park, visitors can also visit the dynamic motion simulator, CineMania, at the entertainment mall. The ride lasts for about four minutes at a charge of S\$6 for adults and S\$4 for kids.

Volcanoland

Another theme park located in Sentosa is the S\$20 million Volcanoland. As the name implies, the Volcanoland is aimed at offering an exciting perspective of the inside of a volcano. It has a 20-meter-high volcano which "erupts" every thirty minutes, spewing smoke about ten meters high into the sky. Visitors can ride to the bowels of the simulated active volcano, walk across a rope bridge above bubbling flows of "lava". They can also see the underground waterfalls and prehistoric fossils and observe a three-dimensional show of the creation of the universe. In addition, visitors can also make an archaeological expedition to discover the long-lost Maya civilization.

The admission charges are S\$10 for adults and S\$6 for children from 3-12. The park is opened from 9.00 a.m. to 9.00 p.m. daily.

Underwater World

Located at Sentosa island, this oceanarium offers an insight into the marine world. Visitors walk through a 83 meter long acrylic tunnel with a moving pathway that allows them to view over 600 marine specimens of 350 species. They will be able to experience having fishes swimming over

their heads and coming to within inches of them. They will feel as if they are walking along the sea bed in the deep, blue ocean together with these fishes. Visitors can also watch divers feeding stingrays, sharks and gigantic groupers. To excite primarily the children, there is also a touch pool where visitors can get to feel and fondle starfishes, sea cucumbers and other fishes.

Admission fees are S\$12 for adults and S\$6 for children. It is opened from 9.00 a.m. to 9.00 p.m.

Tang Dynasty City

The Tang Dynasty City (TDC) is a S\$70 million theme park located on a 12 hectare land on the west coast of Singapore. It was opened to the public on 12 January 1992. TDC was originally designed to take the form of a leisure and entertainment theme park, emphasizing ancient Chinese culture and history. It is modeled after the ancient capital city of Chang-An (meaning Eternal Peace and is now known as Xian) in the Tang dynasty and promised to transport visitors 1300 years back to one of the most glorious period of Chinese history, the Tang Dynasty (618-907 AD). The Tang Dynasty City attempts not only to feature the unique scenery, architecture and works of art of the Tang era but also the way of life of the people then.

The theme park is fenced in by a 10-meter high and 30 meter thick wall, utilizing bricks shipped directly from China. On entering the city, visitors can ascend the Arch Bridge and come to the Silk Road Open City where a teahouse, medical halls, fortune tellers, paper-makers, wine merchants and shops selling handicrafts and calligraphy can be found. Visitors can also offer prayers at the Buddhist temple. Every

staff at the city is dressed in period costume. Camels and horses which used to serve as transportation means in the Tang period can also be found.

Inside the theme park, one can also find the replica of the original Daming Palace which depicts the grandeur of the Tang dynasty's architecture, complete with antiques and artifacts. The Imperial Banquet Hall, which can be hired out for conventions and theme parties can accommodate 2500 guests. Another important building under development is the Underground Palace which is to house terra-cotta warriors and horses fashioned after the real ones in China. Under construction is the 55 meter high Heng Yang Pagoda where visitors can enjoy a panoramic view of the entire theme city.

Other than the buildings, the theme parks provides other activities to keep the visitors enthralled. It has wedding parade, stunt-man shows and other activities to keep both adults and children engaged. A wax museum depicting effigies of the various emperors and magnificent personages in Chinese history is also opened to the public. The effigies displayed here are in chronological and dynastic order and visitors can trace the progress of political, economic and cultural development in China. Another recently added attraction is the Ghost Mansion where visitors are offered the chance to experience "Poltergeist" 3-D Sound Illusion and "Bodysonic" effect, claimed to be the only one in the Asia-Pacific region outside Japan.

The Tai He Lou Theater Restaurant offers visitors the opportunities to dine and watch acrobatic and martial arts show. Several other eating places including a Japanese restaurant and local food court, are also

available. Entrance charges are S\$15 for adults and S\$10 for child below 12 years. It is opened from 9.30 a.m. to 10 in the evening when evening entrance fees are reduced.

Haw Par Villa Dragon World

Haw Par Villa also known as the Tiger Balm Gardens was originally built in 1937 by the millionaire philanthropist Aw Boon Haw. It was destroyed during the Japanese occupation but rebuilt after the war. The park-like ground had a wide collection of unique statues based on Chinese legends and beliefs. It became one of the premier attractions in Singapore at that time when it was opened to the public. However, as the years passed, it fell into disrepair and needed to be rebuilt. The Singapore Tourist Promotion Board decided to call for a tender to convert the Tiger Balm Gardens into a Chinese mythological theme park. The Villa was thus completely transformed at a cost of S\$80 million and opened to the public again on 2 October 1990. The newly-revamped theme park was renamed the Haw Par Villa Dragon World, to be distinguished from its old identify. It now occupies an area of about 9.5 hectares and is five times larger than the old one.

The mythological statues which were the original attractions of the Villa have been restored, repainted and regrouped for easier viewing. The completely new attractions are three open-air theaters, three fully equipped indoor theaters and two exciting rides. On entering the theme park, one of the first stops is the Four Seasons Theater where costumed actors entertain audiences with their jokes, clowning and tales from

ancient China. Visitors are often invited to join in. An outdoor puppet theater, designed with children in mind, has computerized puppets.

The South China Sea amphitheater, the biggest in the park, is able to accommodate 2000 visitors. Chinese operas, martial arts and lion dances are held here and audience are invited to participate. There are also high-tech indoor theaters. For instance, the Creation of the World Theater presents visitors with the classic tales of how the world was first created, using three dimensional slides, lasers and other optical effects. The Legend and Heroes Theater has a life-sized and life-like robot programmed as an old storyteller who tells his tales using multi-image slides and theatrical lights. The Spirit of the Orient Theater features a video show and audio visual explanations about Chinese folklore, customs, traditions and festivals.

Two of the park's most popular attractions are the Wrath of the Water Gods Flume Ride and the Tales of China Boat Ride. The former invites visitors to sit in a five-man boats and takes a breath-taking 18 minutes rides with two plunges, much like a roller coaster ride. In the China Boat Ride, visitors are to sit in a 16-seat boat which weaves its way inside a dragon's "belly". It passes statues on both banks that depict the battles of the Eight Immortals, the infamous Ten Courts of Hell and many others.

There are also gift shops and picturesque hand-carts selling souvenirs around the garden. Food-carts and restaurants are also established to serve the visitors. The park is opened from 9 a.m. to 6 p.m. Admission tickets are S\$16 for adults and S\$10 for kids.

The Night Safari

The Night Safari is located next to the Singapore Zoological Gardens and occupies about 40 hectares of land. As the name implies, the animals kept are primarily nocturnal and best observed during the night. The Night Safari is home to more than 1200 animals of over 110 exotic species. It also serves as a conservation center for the breeding of endangered species.

At the entrance of the park is a man-made landscape with lush vegetation and a waterfall. Visitors can decide to take a slow stroll along the well-lit foot path or get on a tram to look at the animals. The entrance fee is S\$15 for adults and S\$10 for children. Operating hours are from 7.30 p.m. to mid-night.

Jurong Bird Park

Jurong Bird Park is set in 20 hectares of lush tropical vegetation and is home to one of the largest, most spectacular collections of exotic birds in the world. There are close to 8000 birds representing about 600 species from different continents. The birds are classified into several categories and located at different parts of the park.

One of the main attractions of the park is the Waterfall Aviary. It is considered to be the world's largest walk-in aviary and has the tallest man-made waterfall. The birds are allowed to roam around free and visitors get to see them in its most natural state. The South East Asian Birds Aviary features 100 exotic and endangered species of birds from the South East Asian region. The Birds of Prey Show allows visitors to observe eagles, hawks and falcons in a magnificent display of free flight at this show. These birds of

prey are trained to follow instructions of trainers. The All Star Bird Show features talented and well trained birds doing different tricks to keep the audience entertained. The Penguin Parade provides visitors the opportunities to catch these birds swimming and feeding underwater.

Visitors can choose to walk around the park or take a ride to cruise the park. There are many eateries in the park and visitors can even arrange to have their breakfast in the park with birds singing and chirping in the background.

Entrance tickets are S\$9 for adults and S\$3 for children. The park is opened from 9.00 a.m. to 6.00 p.m.

PROBLEMS FACING THE THEME PARK INDUSTRY

The theme park industry in Singapore is facing changes in demographics, technology, economic and social conditions. These changes pose not only threats but also offer opportunities and challenges. It is therefore imperative that marketers of these theme parks be proactive in their planning and strategy formulations so that the industry will not only survive but prosper in the future. In this section, the problems will first be discussed, followed by an examination of the prospect of the industry.

Changing Demographics

The Singapore population structure is undergoing changes. The rate of population has slowed over the last few decades. The median age had increased from 24.4 years in 1980 to 29.8 years in 1990. The proportion of persons aged under 15 has also decreased from 43 percent in 1980 to 34 percent in

1990. Moreover, the rate of family formation had also slowed down considerably. For instance, the proportion of single females (age group 30-39) had increased from 25.1 percent in 1980 to 35.7 percent in 1990. This is reported in the Population Census of Singapore 1990. The main implication is that the primary market segment of the theme park industry, the family units, may not increase as fast as desired. As a result, reliance on foreign visitors (consisting of family units) will be more urgently needed.

Local and Foreign Competition

The competition among the various theme parks and attractions will be intensified in future. Other than those described in the earlier sections, there are many other attractions which have been quite well patronized by the local and foreign tourists alike. The most popular of these is the Singapore Zoological Garden which attracted close to 1.5 million visitors in 1993. Table 1 below shows the number of visitors to the various tourist attractions in Singapore.

Most of the theme parks were set up in the 1991-1994 period and being privately owned did not publish visitors statistics. It is therefore difficult to gauge the extent of their success. According to the Survey of Overseas Visitors to Singapore 1994 published by the Singapore Tourist Promotion Board, of the 10,039 visitors surveyed, about 40 percent of them visited Sentosa. Of the various tourist attractions mentioned, about a quarter of them visited the Underwater World. Almost 11 percent visited the Coralarium and 10.2 percent went to the Asian Village. No statistics were available about the percentage of visitors who called on the other two theme

parks located in Sentosa (Volcanoland and Fantasy Island) as both were not opened to the public yet. Of the tourist sites located on the mainland, the Jurong Bird Park attracted 16.2 percent of visitors. This was followed by the Singapore Zoological Gardens (11.8 percent), Haw Par Villa Dragon World (9.1 percent). The other theme park, the Tang Dynasty City attracted only 1.6 percent of the visitors.

There are other signs that the theme parks are not attracting the number of visitors desired. Based on a report published by the local newspaper (The Straits Times) on 27 August 1995, both the management of Tang Dynasty City and Fantasy Island admitted that they had to revamp their operations to attract more visitors. An earlier report by the same paper on 31 July 1995 also mentioned that the Haw Par Villa Dragon World also planned to add "gimmicks" so that it will become more attractive to visitors. In general, the report observed that the visitor figures for all the theme parks which charged admission had dipped.

These existing theme parks are not only competing among themselves but have also to be wary of new entrants to the market place. There is a plan by a local company to tie up with Japanese entertainment giant Sega Enterprises and a Hong Kong company to build a S\$50 million high-tech theme park on the east coast of Singapore.

Competition of the various theme parks may not confine to only among the local establishments. According to another report (The Straits Times on 11 December 1994), over 200 parks have been planned for the Asian region over the next 10 years. This made Asia the fastest growing region for theme park developments. For instance, the Samaworld, a 140 hectare and S\$194

million development, will be opened to the public in Malaysia's Gentling Highlands. Other popular theme parks which are in operation include the Disneyland in Tokyo, Japan, the Siam Park City in Bangkok, Thailand, the Ancol in Jakarta, Indonesia, the Mini China and Cultural Village in Shenzhen, China. It is envisaged that the theme park industry competition will grow even more intensified in the near future.

Changing Patterns of Visitors

According to the Singapore Tourist Promotion Board Report 1993/94, visitors totaled 6.4 million in 1993. The proportion of visitors from Asia continued to dominate the market, contributing to almost 70 percent of total arrivals. In terms of country of residence, the majority of them came from the Asean region (30.2 percent). This was followed by Japan (15.6 percent) and Taiwan (6.6 percent). In terms of growth, China was the top-performing market with arrivals increasing by 143 percent over that of 1992.

The length of stay of visitors had decreased by 4 percent to 3.59 days. This has serious implications for the theme park industry. Given the short stay, tourists have to decide between spending more time shopping or visiting tourist sites. Of the many attractions available, it is evident that theme parks have to compete vigorously for a share of the market.

As many of the tourists are from the Asian region, a theme park like the Asian Village may not be as attractive to them. Theme parks such as the Tang Dynasty City, on the other hand, may not be able to draw enthusiastic visitors from China, Taiwan or Hong Kong. Tourists from these places may have visited the real Xian city in China or

are so familiar with the theme of the park that they find it lower on their list of "must see" attractions.

Changing Taste of Visitors

The tastes of tourists have undergone changes over the years. In the old days, visitors to tourist sites would be contented with watching shows or admiring the various buildings and structures. With the new generation of visitors, they look forward not to passive displays or shows but favor more interactive types of attractions. In the case of the theme parks in Singapore, the extent of audience participation is still minimal. With the exception of Fantasy Island where visitors are supposed to take water rides of different kinds, the other theme parks appear to offer fewer opportunities for audience participation. It is therefore imperative that theme parks operators must cater to the changing needs and desires of the potential visitors and meet their aspirations for a more active and participative types of entertainment.

Cost of Visits

The admission charges for most of the theme parks are about S\$15 for adults and S\$10 for children. With a family of four, the total admission charges may add up to S\$50 for a local family contemplating of visiting the parks. For the tourists from the Asian region, the admission charge would be considered as expensive, given the strength of the Singapore dollars. Moreover, these theme parks generally provide attraction lasting less than 4 hours on average, unlike mega-theme parks like those in the U.S. where visitors can spend not only hours but days keeping themselves and families entertained. Potential visitors may thus feel that the entertainment values

may be less than the costs of the visit. This perception will affect the level of patronage.

Advancement in Technology

The advent of new technology and the pace of technological changes may render some existing theme parks obsolete in their offers of entertainment activities. It is also possible, as mentioned in a talk given by Graff (1) that future entertainment activities may be carried out at home electronically. This may make visiting theme parks less attractive as it involves both financial cost and time. However, he did caution that the need to go outside of home environment for entertainment. This is because human beings as social animals still treasure certain kinds of personal interactions. Nevertheless, it is essential that theme parks operators be constantly aware of the threats posed by technology and alert of the opportunities to exploit the wonder of technology in order to make theme parks more attractive.

PROSPECTS OF THE THEME PARK INDUSTRY

Not every thing is gloomy with the theme industry in Singapore. Several changing trends may offer opportunities for the industry to grow and even prosper in the future. Some of these trends are discussed in this section.

Singapore as Tourist Destination

Singapore attracted 6.9 million visitors in 1994. This number is expected to continue growing but at an abated rate. With Singapore keeping its image as a clean, green and safe city, it is anticipated that more visitors will continue to visit the Republic. The Singapore Tourist Promotion

Board will continue to boost Singapore's image as a safe and attractive tourist destination. There are also talks given by government officials that Singapore needs to develop its tourism industry in conjunction with its neighboring countries as cluster. This is to ensure that tourists while visiting Singapore will also be encouraged to visit the adjoining countries together. This will be a win-win strategy and will gain the support of the neighboring countries. If this strategy works, it is forecast that visitors to Singapore will continue to grow.

Theme Parks Operators are Changing

With a declining number of visitors, many theme parks operators in Singapore are implementing changes to arrest the decline. These changes are aiming at meeting the needs and wants of the consumers. For instance, the Tang Dynasty City has proposed to have interactive exhibits, including virtual reality, and a program of new activities to enhance its appeal. The acrobatic and stunt shows will also involve the audience. It has also proposed to add a family entertainment center to increase its appeal to children, as the current set up is primarily adult oriented. The Fantasy Island, on the other hand, plans to introduce new water rides and other features every three years. This is to ensure that visitors will be happy to return to the park as they get bored with existing rides and features. Haw Par Villa Dragon World is also planning to add about 170 statues from the old Tiger Balm Gardens which have been in storage. Other measures are being planned to make the Villa more attractive.

It is evident that theme parks in Singapore must continue to innovate in order to keep pace with the changing tastes and wants of the visitors.

Growing Affluence of Neighboring Countries

It is fortunate that Singapore is located in the Asia Pacific region where economic growth is expected to continue unabated, barring an unpredictable change in the political environment. With growing affluence in the region, more and more people are able and keen to travel outside their own countries. This is evident judging from the growing number of tourists coming to Singapore from the Asean region, China, Taiwan and Korea. The theme park industry in Singapore must therefore be prepared to study the needs and wants of these tourists/consumers to understand their demographic and psychographic make-up, their motives, benefits sought and general consumption behavior. Only with such understanding will they be able to offer the right combinations of tourism products and services desired.

SUMMARY AND CONCLUSION

This paper provides an illustration of the various theme parks in Singapore and their essential characters. They range from the

culture based (e.g. Haw Par Villa Dragon World, Tang Dynasty City and Asian Village) to the modern and excitement based (e.g. Fantasy Island, Volcanoland and Underwater World). They aim to cater to different tastes of the visitors and generally aspire to provide family entertainment and recreation values. However, many of the theme parks are not meeting the desired targets of visitors. The problems faced could be due to the passive nature of the exhibits, the inadequate values obtained (as judged by admission fees and the entertainment provided) and other factors. It is therefore essential that the theme parks operators must be prepared to mount a study of this lack of support, both by the locals and foreign visitors so that a new set of strategy can be formulated to rectify the undesirable situations.

Although the theme park industry is facing problems now, these are not insurmountable. With the continued support provided by the government in attracting more tourists to come to Singapore and the theme park industry striving to innovate in a proactive manner, it is highly probable that the theme park industry will be able to survive and grow in the near future.

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Table 1
Visitors to Places of Interest 1985, 1990 and 1993
(in thousands)

		1985	1990	1993
1	Sentosa	1641	2590	4040*
	Underwater World	n.a.	n.a.	1882*
	Asian Village	n.a.	n.a.	1018*
2	Zoological Gardens	850	1341	1487
3	Jurong Bird Park	741	1010	1550
4	Science Center	559	712	534
5	Chinese/Japanese Gardens	642	453	287

Source: Singapore Annual Report on Tourism Statistics, various years, Sentosa Annual Report 1993/94

*Financial year 1993/94