

PLANNING FOR LA28 AUDIENCES

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TABLE OF CONTENTS

Overview	1
Los Angeles 1984 Olympic Games	3
London 2012 Olympic and Paralympic Games	5
Qatar 2022 FIFA World Cup	8
Paris 2024 Olympic and Paralympic Games	10
Cross-Case Findings	12
Bibliography	15

OVERVIEW

Museum Audiences During Mega-Sporting Events

Mega-events can bring millions of visitors to a host city without producing a corresponding increase in museum attendance. Across London 2012, Qatar 2022, and Paris 2024, international visitor volume did not reliably translate into visits to established cultural institutions; in some cases, major museums experienced pronounced declines. Local and regional audiences therefore emerge as central to Games-time cultural planning. Institutions with strong community relationships may be better positioned to sustain participation, while programming located along established routes and gathering places can reach broader Games-time audiences.

This report examines audience behavior during the LA84 Olympic Games, London 2012 Olympic and Paralympic Games, Qatar 2022 FIFA World Cup and Paris 2024 Olympic and Paralympic Games. **The case studies assess visitor composition, cultural attendance, movement and spending, and institutional approaches to reaching Games-time audiences.** The analysis draws on official post-event evaluations, institutional and tourism data, published research, and stakeholder interviews with cultural and event-sector practitioners conducted through the Staging Heritage project.

Local residents, domestic visitors and day-trippers formed substantial parts of the host-city audience across the four cases. International spectators also presented opportunities, while companions, volunteers, event personnel and visitors to fan zones created additional audiences for institutions able to connect with Games-related activity.

Spectators often have limited time and discretionary spending for cultural visits. Competition schedules structure their movement, while travel, accommodation and tickets absorb significant portions of visitor budgets. Cultural experiences must therefore be accessible, clearly communicated and compatible with the practical demands of Games-time travel.

Institutional outcomes varied according to location, access, audience base and event relevance. Security perimeters and transport changes reduced attendance at some museums, while some institutions connected to venues, visitor routes, or Games-related narratives attracted substantial attention. Short formats and free or low-cost admission may make participation more compatible with Games-time schedules and spending constraints.

For LA28, international visitors should not be considered as the primary or most dependable audience base for cultural institutions. Planning should begin with the communities of Los Angeles and the wider region: the people most likely to remain present throughout the Games, return afterward, and sustain cultural participation beyond 2028. Museums should plan programming, communications, pricing, and partnerships around these audiences while identifying targeted opportunities to reach spectators and other Games-adjacent groups.

Understanding Games-Time Audiences

Mega-sporting events change how people move through a host city, allocate their time and spending, and decide whether to visit cultural institutions. Museums preparing for LA28 should consider changes among their existing audiences alongside opportunities to reach spectators, companions, volunteers, local residents and regional visitors.

WORKING DEFINITIONS

Games-time audience:

The full range of local, regional and international visitors who may engage with museums during the Games, including regular audiences and people whose presence is connected to the event.

Audience displacement:

A temporary reduction or change in ordinary visitation when tourists or local audiences postpone museum visits because of congestion, costs, transport disruption or security restrictions.

Games-adjacent audience:

People whose primary activity is connected to the Games but who may visit cultural institutions before, between or after events, including spectators, companions, volunteers and fan-zone visitors.

Visitor substitution:

The redirection of visitors' time and spending from museums and other attractions toward sporting events and Games-related activities.

Event relevance:

A clear connection between a cultural offer and the Games, host city or visitor experience that increases its appeal during the event period.

COMPARATIVE INSTITUTIONAL QUESTIONS

- Which audiences are cultural institutions most likely to reach during the Games?
- How do mega-events affect ordinary museum visitation?
- How do event schedules, travel costs and security restrictions shape cultural participation?
- Which programming formats are compatible with Games-time visitor behavior?
- How can institutions remain accessible and relevant to local and regional audiences?

LOS ANGELES 1984 OLYMPIC GAMES

Uneven Visitor Patterns and Cultural Attendance

The LA84 official report records substantial changes in ordinary visitor behavior. With the Games scheduled six years in advance, some tourists and regional residents made alternative vacation and visitation plans, while some business trips were postponed. Regional residents also redirected spending from other recreational activities toward participation in the Games.

The report presented USD 331 million as a potential worst-case displacement estimate encompassing both a generally slow tourist summer and Games-related displacement; it did not treat the full amount as a loss caused by the Games. Overall, the report concluded that the Games generated a positive economic impact for Southern California (Los Angeles Olympic Organizing Committee, 1985).

A Distributed Cultural Program

The ten-week Olympic Arts Festival ran from June 1 to August 12, with most of its programming taking place before the sporting competitions and its final sixteen days overlapping with the Games. Museums, galleries, theaters, dance companies, and cultural and community centers participated as co-producers.

Across 48 venues, the Festival presented 72 performing-arts productions and more than 30 visual-arts exhibitions. The official report recorded approximately 970,000 paid attendances across the Festival's arts programming (Los Angeles Olympic Organizing Committee, 1985).

Concentrated Gains at Exposition Park

The official report also records substantial attendance at cultural facilities in Exposition Park. New museums and exhibitions there received approximately 1.5 million visits during the Games, with substantial attendance increases reportedly continuing afterward. This concentrated result occurred alongside wider visitor displacement across Southern California.

It indicates that cultural institutions could attract Games-time audiences when their location and programming connected them clearly to Games-related activity, even as the wider visitor economy experienced uneven outcomes (Los Angeles Olympic Organizing Committee, 1985).

LA84 TAKEAWAYS FOR LA28



Prayitno / Thank you for (12 millions +) view from Los Angeles, USA, Public domain, via Wikimedia Commons

Citywide visitation should not be considered a reliable basis for projecting museum attendance. LA84 produced both visitor displacement across Southern California and substantial attendance at particular cultural facilities. Institutional projections for LA28 should therefore be based on location, access, existing audiences, and specific programming conditions.

Cultural participation can begin well before the competition period. Seven of the Olympic Arts Festival's ten weeks preceded the Games. This expanded the period for cultural engagement and reduced direct overlap between most of the Festival and the sporting schedule.

Venue-adjacent attendance can be significant, although the effect should not be generalized. The 1.5 million visits reported at Exposition Park show that some cultural facilities attracted substantial Games-time audiences. However, the available evidence does not establish whether this resulted from proximity, programming, new facilities, or a combination of factors.

LONDON 2012 OLYMPIC AND PARALYMPIC GAMES

London 2012 attracted a substantial Games-related audience without producing an overall increase in international visitation. Between July and September 2012, more than 800,000 overseas visitors attended a Games-related event or identified the Games as their principal reason for visiting the UK. Together, they spent nearly £1.1 billion. Nevertheless, international visitor numbers fell significantly relative to recent trends during the same quarter, indicating that Games-related travel partly displaced ordinary tourism (Department for Culture, Media and Sport, 2013). Most ticketed spectators were domestic visitors. Estimates cited in the government's post-Games evaluation indicate that UK residents purchased 80–

85 percent of the 11 million Olympic and Paralympic tickets sold (Department for Culture, Media and Sport, 2013). This underscores the importance of distinguishing the international profile of a mega-event from the composition of its in-person audience.

Games-related visitors directed considerable spending toward the event experience. Visitors attending sporting or cultural events spent more than £2.4 billion in total, including ticket purchases. When ticket sales were excluded, estimated spending fell to approximately £1.8 billion (Department for Culture, Media and Sport, 2013). The difference illustrates how event costs can absorb a substantial share of visitor spending before museums and other attractions are considered.



Museum and Cultural Attendance During the Games

London's major museums experienced marked attendance declines during parts of the Olympic period. The British Museum received 169,970 fewer visitors in July 2012 than in July 2011, a decrease of approximately 25 percent. The National Portrait Gallery recorded 58,461 fewer visitors over the same period, while attendance at the National Gallery was 40 percent lower during the first week of August than during the equivalent week in 2011 (Steel, 2012). Location near Games activity did not automatically increase museum visitation. The National Maritime Museum, located near the Olympic equestrian venue in Greenwich, adjusted its opening hours to accommodate spectators

but still received 11,167 fewer visitors in July than in the previous year.

Its attendance had increased by 63,356 visitors in June, however, demonstrating that effects could vary substantially across different stages of the Games period (Steel, 2012). These short-term declines occurred even though domestic day visits to London peaked in 2012. The coexistence of high citywide visitation and lower attendance at individual museums shows that aggregate tourism figures do not reliably predict institutional outcomes. Museum attendance remained sensitive to timing, location, ordinary audience behavior, and the ways visitors prioritized Games-related activities (Department for Culture, Media and Sport, 2020).

Strategies for Reaching Cultural Audiences

London's evidence points to two strategies used to reach cultural audiences under Games-time conditions:

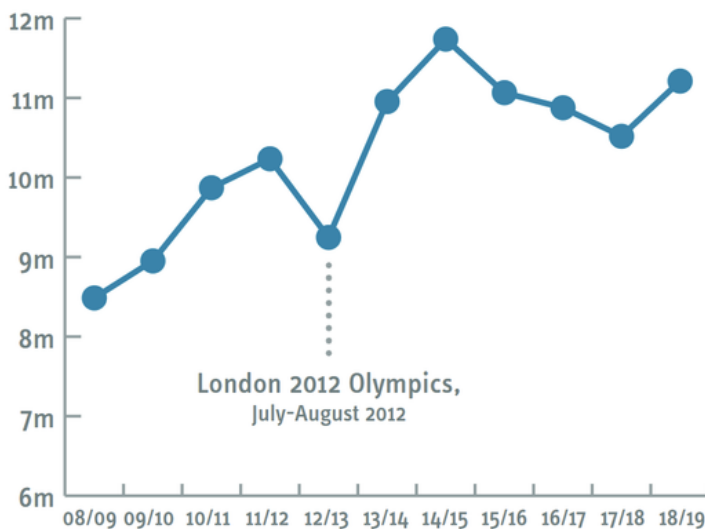
Programming that leveraged the Games audience.

Festival events, free-to-view activities, Live Sites, and Torch Relay events connected cultural programming to the Games experience without competing directly with ticketed sports schedules (Department for Culture, Media and Sport, 2013).

Local audience retention strategies. Maintaining engagement with habitual cultural audiences helped institutions respond to fluctuations in tourism and museum attendance, consistent with the DCMS museum trend study's emphasis on the "active culture market" (Department for Culture, Media and Sport, 2020).

Visits to DCMS-sponsored museums in London in Quarter 2

[DCMS visit numbers]



DCMS (UK Government). *DCMS-sponsored museum visit trends (Main Report)* (includes evidence on museum visit dips during Olympics period; "active culture market" vs mass market; audience context).

LONDON 2012 TAKEAWAYS FOR LA28

High visitor numbers during the Games do not necessarily translate into higher museum attendance. London attracted a substantial Games-related audience while several major museums experienced significant attendance declines. Visitors present in the city may prioritize competitions, celebrations, and temporary events, while regular tourists and local audiences may change or postpone their usual cultural activities. LA28 visitor projections should therefore provide context, but should not be treated as direct forecasts of attendance at individual institutions.

Cultural programming may reach Games-time audiences more effectively when it forms part of the wider event experience. London's festival events, Live Sites, free-to-view activities, and Torch Relay events created opportunities for participation within Games-related locations, schedules, and patterns of movement. The evidence suggests particular value in cultural experiences that are visible, easy to access, and compatible with the limited time available between sporting events, although these formats should not be assumed to generate visits to museums themselves.

Museums should continue engaging their regular audiences throughout the Games. London's experience indicates that institutions cannot rely solely on Games-related tourists to replace displaced visitors. Continued engagement with habitual museum-goers and other culturally active residents may provide greater continuity when tourism fluctuates or city conditions discourage ordinary visits. For LA28, audience planning should therefore consider how institutions can remain accessible and relevant to established audiences alongside efforts to reach spectators and other Games-adjacent groups.

QATAR 2022 FIFA WORLD CUP

Visitor Scale, Movement, and Time Constraints

More than one million international visitors traveled to Qatar to attend matches during the World Cup. The leading visitor markets included Saudi Arabia, India, the United States, the United Kingdom, and Mexico. FIFA separately reported that more than 1.4 million fans from around the world were present for the tournament, indicating a large, internationally diverse Games-time audience (FIFA, 2022a; FIFA, 2022b).

Qatar's compact geography shaped how this audience experienced the tournament. FIFA described Qatar 2022 as the most compact World Cup since 1930, allowing spectators to attend several matches and entertainment activities in a single day. More than 1.8 million visits were recorded at the FIFA Fan Festival at Al Bidda Park, while the host country reported more than 530,000 attendances at entertainment events each day.

These figures demonstrate the scale of activity outside the stadiums and the importance of fan-oriented public environments (FIFA, 2022a; FIFA, 2022b).

The regional distribution of visitors also affected the time available for cultural participation. The IMF estimated that approximately 300,000 of the tournament's one million visitors stayed in neighboring Gulf countries and commuted to Qatar, reducing the time some spectators had available in Qatar for other activities. Its economic analysis also treated airfare, accommodation, match tickets, and other expenses as major components of estimated visitor spending. Together, these conditions suggest that cultural visits had to fit around tightly structured schedules, regional travel, and substantial event-related costs (Bibolov et al., 2024).

Table 1. Qatar: World Cup-Related Revenue and GVA 1/

	Spending per visitor (In US dollar)		Number	Visitors (In millions)	GVA ratio	GVA (In US\$ millions)	
	Low	High				Low	High
Air fare	800	2,000	1	0.7	0.31	174	434
Accommodation 2/	480	529	2	0.7	0.52	350	385
Restaurants	20	200	2	0.7	0.42	12	118
Venue catering	20	200	1	1.0	0.50	10	100
Shopping	100	500	1	1.0	0.82	82	410
Other revenue	50	100	1	0.7	0.50	18	35
Broadcasting revenue	930	930	1	1.0	1.0	930	930
Total							
In US\$ millions						1,575	2,412
% of 2022 GDP						0.7	1.0

Sources: Various reports cited in this note and IMF staff calculations.

1/ Per-visitor spending is estimated as the sum of air fare (internet search results for coach to Doha during the World Cup), accommodation for 2 nights, the cost for visiting one game, and some other spending. It is scaled up by the estimated number of visitors (1 million, of which 0.7 million lodged in Qatar) and converted to gross value added, or contributions to Qatar's GDP, using the gross value-added (GVA) ratio from the [planning and statistics authority](#). Qatar is assumed to have received 1/3 of the total World Cup broadcasting rights, [reportedly worth \\$1.85 billion](#), similar to the arrangements for the Olympic Games (Zimbalist, 2016).

2/ Using estimated elasticity of hotel GDP to bookings per day. GVA represents difference between estimated monthly hotel GDP during WC and that in 2021Q4. See Annex II.

How Museums and Cultural Institutions Met Visitors

Qatar's cultural institutions used fan-oriented communications to position museums within the World Cup experience. The Qatar Creates pocket guide presented museums, galleries, heritage sites, and exhibitions as part of a wider calendar of cultural activities during the tournament. Qatar Museums also published a dedicated guide recommending cultural experiences before and between matches (Qatar Creates, 2022; Qatar Museums, 2022a).

Cultural content was also incorporated into a major fan environment. The FIFA Museum's special exhibition at the FIFA Fan Festival in Al Bidda Park received approximately 179,000 visits during its four-week run. The wider Fan Festival recorded more than 1.8 million visits throughout the tournament (FIFA, 2022a; FIFA Museum, 2023).

Although these figures do not demonstrate that fan-zone audiences subsequently visited museums elsewhere, they show that museum content could attract substantial participation when embedded within an established gathering place.

Qatar Museums later described the tournament period as record-breaking for attendance across its museums, galleries, heritage sites, and creative spaces. Publicly available reporting does not provide institution-by-institution figures, however, so the scale and distribution of these increases cannot be independently assessed. The evidence nevertheless documents a coordinated effort to make cultural institutions visible and accessible to World Cup visitors (Qatar Museums, 2022b).

WHAT QATAR 2022 SUGGESTS FOR LA28 AUDIENCE PLANNING

Fan-oriented communications can make cultural offerings easier to navigate. Qatar Creates and Qatar Museums organized cultural experiences into accessible guides that helped visitors identify activities suited to their interests, locations, and schedules.

Established fan environments can bring cultural content to substantial audiences. The FIFA Museum exhibition at Al Bidda Park reached visitors within a major gathering place, extending museum participation beyond conventional institutional settings.

Short experiences can fit between Games-related activities. Qatar Museums promoted cultural visits before and between matches, illustrating a planning approach centered on concise, conveniently located programming designed around spectators' schedules.

Attendance reporting should distinguish system-wide and institution-specific results. Qatar Museums reported record visitation during the World Cup, but available data do not show how attendance was distributed among individual institutions.

PARIS 2024 OLYMPIC AND PARALYMPIC GAMES

Visitor Composition and Movement

Greater Paris recorded an estimated 11.2 million visitors during the Olympic period, broadly matching the pre-Games forecast of 11.3 million and representing a 4 percent increase over 2023. This total included tourists, day-trippers, and residents participating in Games-related activity. French visitors accounted for approximately 85 percent of the audience, demonstrating that the Games depended substantially on domestic and regional participation despite their international profile (Paris je t'aime, 2024).

The audience included approximately 3.1 million tourists, of whom 1.4 million were French and 1.7 million were international. A further 3.1 million visitors were

day-trippers, while residents of the Île-de-France region represented 44.6% of the overall total. Among international tourists, the United States, Germany, and the United Kingdom were the leading visitor markets (Paris je t'aime, 2024; OECD, 2025).

Visitor activity was concentrated around competition venues and other locations directly associated with the Games. Paris je t'aime recorded particularly strong increases near sites such as the South Paris Arena and Club France (Paris je t'aime-Tourist Office, 2024a). These localized concentrations show that overall visitor growth was distributed unevenly and followed Games-related destinations and patterns of movement.

Museum Attendance During the Games

Several major cultural institutions experienced substantial attendance declines during summer 2024 despite the increase in tourism during the Olympic period. The Louvre reported a 14% decline across July and August compared with the same months in 2023. Attendance fell by 28 percent at the Centre Pompidou, 26 percent at the Musée d'Orsay, and 50% at the Hôtel de la Marine. Other sites, including the Catacombs and the Basilica of Saint-Denis, maintained or increased their visitation, demonstrating that the effects were not uniform across institutions (OECD, 2025).

The Louvre received 331,760 visitors between July 27 and August 11 and 275,500 during the Paralympic Games. Its accessibility was affected before the opening ceremony: the museum fell within the security perimeter for nine days and closed on July 25 and 26.

At the same time, the Olympic cauldron in the neighboring Tuileries Garden and sporting events passing through the estate generated substantial activity and visibility outside the museum (Musée du Louvre, 2025).

The Paris 2024 case study therefore reveals a distinction between institutional attendance and visibility in the surrounding public realm. Museums and monuments could feature prominently in the visual and spatial experience of the Games without receiving corresponding increases in visitors. Attendance also varied considerably among institutions, indicating that aggregate tourism figures alone cannot explain how Games-time audiences engaged with individual cultural sites.

La Monnaie de Paris was a notable exception. The institution reported a 62% increase in average attendance during the two weeks of Olympic competition compared with the preceding two weeks (Préfecture de la Région d'Île-de-France, 2025). It **minted and exhibited the Paris 2024 medals and presented an exhibition on the history of Olympic medals**, giving visitors a direct connection to the Games. The comparison period differs from the year-over-year figures reported by other museums, but the increase illustrates how clear event relevance could attract visitors even as attendance declined across many established institutions.



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PARIS 2024 TAKEAWAYS FOR LA28

Most Games-time visitors may come from the host region and domestic market. French visitors accounted for approximately 85% of the Paris 2024 audience, while Île-de-France (wide region) residents represented a substantial share of overall participation. LA28 audience planning should therefore address Southern California residents and domestic visitors alongside international spectators.

Visitor activity is likely to concentrate around Games-related destinations. Paris recorded particularly strong activity near competition venues and celebration sites, while visitation remained uneven elsewhere. Cultural institutions should consider how their location, accessibility, and connection to Games-time routes may shape their ability to reach visitors.

Prominence during the Games does not guarantee museum attendance. Several Paris museums experienced substantial declines even when their buildings and surrounding public spaces featured prominently in the event. Cultural visibility and institutional visitation should therefore be treated as distinct outcomes.

Security and transportation measures can significantly affect cultural access. The Louvre's location within the opening-ceremony security perimeter restricted access and required temporary closure. LA28 institutions should assess how security zones, street closures, and transportation changes may affect both visitors and staff.

CROSS-CASE FINDINGS

1. Cultural programming can reach Games-time audiences by meeting them where they are

Across the cases, cultural programming reached substantial audiences when it aligned with Games-time patterns of movement instead of depending exclusively on separate visits to cultural institutions. Interviews with staff from Qatar's Supreme Committee for Delivery and Legacy described "cultural buffer zones" along pedestrian routes leading to World Cup stadiums. These areas included performances, crafts, cultural displays, memorabilia, and opportunities to purchase locally produced goods. Organizers worked with communities surrounding the stadiums to identify what they wanted to present to visitors, connecting cultural programming to both neighborhood identity and established spectator routes.

London's Live Sites, free-to-view events, and Torch Relay activities followed a similar principle by placing cultural experiences within public spaces and Games-related environments. In Paris, visitor activity also concentrated around competition venues and celebration sites. Together, these cases indicate the potential for cultural programming to reach Games-time audiences when it is located along routes they already use and within places where they already gather.

2. High host-city visitation does not guarantee higher museum attendance

London and Paris both attracted substantial Games-related audiences while several major museums experienced significant attendance declines. LA84 similarly combined wider visitor displacement with concentrated attendance gains at particular cultural facilities. Qatar reported record cultural attendance, although publicly available institution-level data are insufficient to determine how those gains were distributed.

The cases therefore show that citywide visitor estimates cannot be treated as museum attendance forecasts. Outcomes depend on location, accessibility, institutional relevance, audience composition, security conditions, transportation changes, and the competition for visitors' limited time.

3. Games-time cultural offers must compete for visitors' time and spending

Across the cases, visitors organized much of their time and spending around event tickets, accommodations, transportation, and Games-related activities. Cultural participation therefore occurred within schedules and budgets already shaped by the event.

Free and low-cost programming can reduce an additional barrier to participation, particularly when offered near venues, fan environments, transportation routes, or neighborhood gathering places. Short-form and drop-in experiences may also be better suited to spectators seeking activities before, between, or after events than cultural offers requiring a substantial separate commitment.

4. Local communities are both core audiences and cultural partners

The case studies consistently challenge the assumption that international tourists will constitute the primary cultural audience during a mega-event. Most London 2012 ticket holders were domestic, while French visitors accounted for approximately 85% of the Paris 2024 audience. Stakeholders interviewed through the British Council reported that London museums with strong relationships to local communities experienced less pronounced attendance declines than institutions more dependent on tourism.

Qatar's cultural buffer zones extended this principle beyond audience retention. Communities surrounding stadiums helped determine which crafts, performances, and forms of local culture would be presented to visitors. Local communities therefore contributed both as audiences and as participants in shaping the host city's cultural representation.

For LA28, neighborhood-based institutions may be especially well positioned because they already hold local relationships, knowledge, and trust. These museums and institutions can also help ensure that Games-time cultural programming reflects the communities through which audiences will move.

5. Direct Games relevance can distinguish an institution within a crowded cultural environment

La Monnaie de Paris provides the clearest example of this: its role in producing and exhibiting the Olympic medals gave visitors an immediate reason to connect the museum with Paris 2024, and its attendance increased while many other major institutions experienced declines.

The broader cases suggest that **relevance can also be created through programming, interpretation, location, or participation in a coordinated public program**. This finding indicates that visitors should be able to understand quickly why a cultural experience is meaningful during the Games.

6. Institutional outcomes will likely remain uneven

No single strategy produced uniform results across the four cases. Museums close to venues did not necessarily benefit, extended hours did not guarantee higher attendance, and visibility in the public realm did not always result in museum entry. At the same time, some institutions and public programs reached substantial audiences in circumstances involving favorable location, clear event relevance, accessibility, or strong connections to established communities.

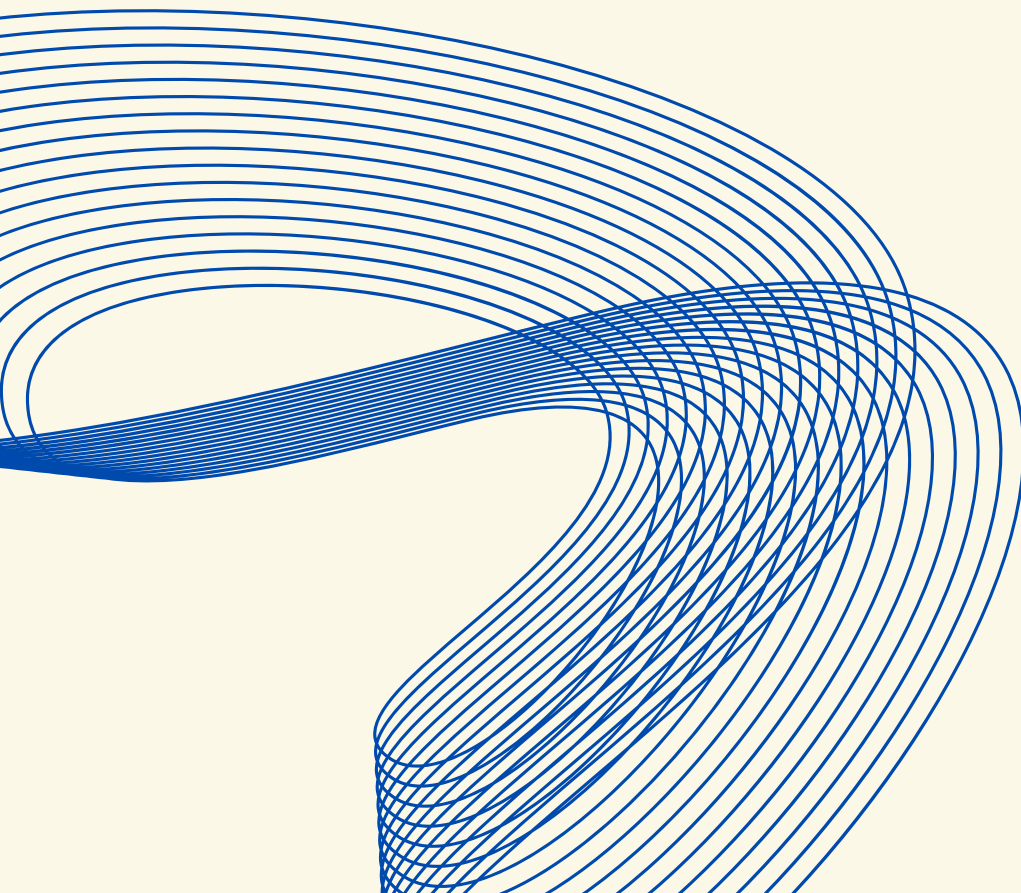
For LA28, international tourism should not be treated as the primary or most dependable audience base for cultural institutions. Planning should begin with the communities of Los Angeles and the wider region: the people most likely to remain present throughout the Games, return afterward, and sustain cultural participation beyond 2028.



Limitations

This report draws on official evaluations, institutional attendance data, tourism and economic reporting, published research, and stakeholder interviews. Host cities used different reporting periods, geographic boundaries, and measures of attendance and participation, while institution-level data—particularly for smaller and community-based organizations—remain uneven.

Attendance patterns may reflect multiple overlapping factors and do not independently establish causation. Interview findings provide valuable practitioner perspectives but are not representative of every institution or audience. Finally, the four host contexts differ substantially from Los Angeles; their experiences identify relevant patterns and planning considerations for LA28, but should not be considered as predicted outcomes for individual LA institutions.



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