



**THEME
INDEX
MUSEUM
INDEX 2021**



Global
Attractions
Attendance
Report

AECOM

TEA THEMED ENTERTAINMENT ASSOCIATION

Cover image:

Universal Beijing Resort opened on September 20, 2021 and includes the Universal Studios Beijing theme park, two resort hotels and Universal CityWalk Beijing.

© Universal Parks & Resorts

Credits

TEA/AECOM 2021 Theme Index and Museum Index: The Global Attractions Attendance Report

Publisher: Themed Entertainment Association (TEA)

Research: AECOM Economics + Advisory

Editor: Martin Palicki

Producer: Francisco Refuerzo and Linda Cheu

Lead Designer: Josue Thur de Koos

Publication team: Cristian Bevington, Beth Chang, Linda Cheu, Lucia Fischer, Lillian Holmes, Doris Li, Jodie Lock, Andrew Logan, Daisy Long, Jason Marshall, Martin Palicki, Michael Posso, Francisco Refuerzo, John Robinett, Pedro Spindler-Ruiz, Joseph Vitone, Chris Yoshii.

©2021 TEA/AECOM. All rights reserved.

Contacts

For further information about AECOM:

Economics + Advisory

John Robinett

Senior Vice President – Economics, Americas
john.robinett@aecom.com
T +1 213 593 8100

Linda Cheu

Vice President – Economics, Americas
linda.cheu@aecom.com
T +1 415 796 8100

Jodie Lock

Associate Director – Economics, EMEA
jodie.lock@aecom.com
T +44 207 061 7000

Chris Yoshii

Vice President – Economics, Asia-Pacific
chris.yoshii@aecom.com
T +852 3922 9000

Beth Chang

Executive Director – Economics, Asia-Pacific
beth.chang@aecom.com
T +852 3922 8109

Francisco Refuerzo

Senior Analyst – Economics, Americas
francisco.refuerzo@aecom.com
T +1 213 593 8490

Architecture and Design

Jeff Damron, AIA
Architect
jeff.damron@aecom.com
T +714 5677-2400

Zak Nawrocki, AIA, NCARB
Managing Principal—Orlando
Zachary.nawrocki@aecom.com
T +1 407 843 6552

For information about TEA (Themed Entertainment Association):

Martin Palicki

Theme Index Editor and Press Contact
martin@inparkmagazine.com
T +1 262 412 7107

Lindsey Nelson

TEA Executive Director
lindsey@teaconnect.org
T +1 818 843 8497

TEAconnect.org

THEME INDEX MUSEUM INDEX 2021

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.



Contents



The Big Picture	6
The Americas	18
Asia-Pacific	36
EMEA	50
Museums	62
About The Study	92
Frequently Asked Questions	93

Disney Enchantment at Magic Kingdom Park debuted in October of 2021 as part of Disney World's 50th Anniversary celebration

© Disney

The Big Picture

The industry started on the road to recovery in 2021. Compared to the year prior, theme parks increased attendance globally by an impressive 72%.

Total attendance in some areas of the world was in reach of pre-pandemic levels. The speed of recovery was largely influenced by the level of government restrictions, the success of vaccine rollouts, and general consumer confidence levels.

China, the engine behind Asia's growth in recent years, struggled with lockdowns, quarantines, and travel restrictions, resulting in only a 25% increase over 2020. North America fared exceptionally well with a 136% increase in attendance over 2020, fueled by pent-up demand and more relaxed restrictions during the key summer months.

With perhaps the notable exception of China, the marketplace has continued to bounce back this year. Although challenges like labor, supply chain, and inflation continue, the industry is poised to continue its comeback in 2022 and 2023.



John Robinett

Senior Vice President,
AECOM Economics + Advisory

“

Total attendance in some areas of the world was in reach of pre-pandemic levels.



Cedar Point 150th Anniversary Celebration, Sandusky, Ohio
© Cedar Fair

Ranking

Because of the vast disparity in operating conditions imposed on parks around the world, the playing field was not level. We decided to continue last year's system of holding the 2019 rankings and showing how parks performed relative to 2019 and 2020. We are optimistic that conditions will allow us to resume ranking parks and museums soon.

Unpacking the numbers

Across the board, facilities that operated seasonally and draw from a more local resident population performed better, largely because the summer of 2021 saw few governmental restrictions but also fewer international tourists. Parks and museums that normally see a large number of Chinese tourists were especially affected.

Despite continuing volume generally below pre-pandemic levels, many parks reported substantial gains in per capita spending. Part of that is due to consumers' pent-up demand from 2020, as well as elevated savings levels.

Parks capitalized on that through additional retail and food options, but they also turned to technology.

Technological solutions addressing ticketing, capacity, and queuing were accelerated during the pandemic. Dynamic pricing, required reservations, electronic ticketing, and queue management are examples of how parks have been able to provide more efficiency and sometimes monetize perks that used to be free. As a benefit to guests, the overall visitor experience was made more comfortable and less stressful.

141.35m

Top 25 theme parks worldwide attendance 2021

83.26m

Top 25 theme parks worldwide attendance 2020





The industry continues to face an ongoing labor shortage. The large amount of entry-level seasonal positions is particularly challenging to fill with the current labor market squeeze. Parks utilized a variety of solutions, from adjusting operating schedules, offering significant hiring bonuses, and in some cases, reducing the amount of workforce needed.

We would be remiss not to mention the current global economic situation. As always, there are certain factors we are not able to control within the industry. Global inflation and economic contraction are risks likely to shape the near future. These are part of the natural business cycle and our industry will respond professionally to them, as it always has.



China's OCT chain bounced back to a reported 97% of pre-pandemic numbers.

Asia Pacific

Pandemic restrictions varied widely from country to country, with China being one of the strictest in the world. The outsized role China plays in the market resulted in a dampening effect on parks all around the region, with results performing at 55% of 2019 attendance. One exception was China's OCT chain, which bounced back to a reported 97% of pre-pandemic numbers, in large part due to the acquisition of nine new properties and aggressive discounting.

Within the market we see a fairly strong pipeline of investment, as well as the start of consolidation as the industry in Asia begins to mature. Once the Chinese tourism engine is unshackled from government restrictions, we see a strong comeback for the entire region.



Tornado Chasers ride at Futuroscope
© Futuroscope

Europe, Middle East, Africa

Because many European parks are seasonal, it was largely back to business in the summer of 2021. Merlin notably reported revenues at some properties greater than 2019. On the attendance front, Europa-Park and Efteling were standouts both with over 3 million visitors, rivaling Disneyland Paris, which had the best numbers in Europe at 3.5 million.

We think demand is strong on the continent with investments being planned for upcoming years. All things remaining equal, 2022 and 2023 should be improved years.

Parks in the Middle East, particularly in the UAE, were open for visitors quickly thanks to effective vaccination efforts and relatively easy access. Expo 2020 Dubai served as a major draw for the end of 2021 and helped highlight the region's tourism potential. We hope some of the parks in Dubai and Abu



We think demand is strong on the continent with investments being planned for upcoming years.

Dhabi will soon make it onto our top-ranking lists.

Americas

Pent-up demand and reduced worries about COVID during the summer of 2021 led to the US outperforming every other market. This is impressive, given China's rapid outpacing of American parks prior to the pandemic. Of particular note were North American waterparks, which improved significantly from 2020 and even approached 2019

levels.

The region's hub of Orlando, Florida, home to many of our list's top operators, successfully welcomed backed visitors anxious to return to the parks while still navigating COVID precautions and reduced international travel. The word "resilient" comes to mind when looking at this market, as evidenced most recently by safe and quick re-openings following the damaging

Hurricane Ian.

It's worth noting that many major operators are moving ahead with planned investments, signaling that 2022 will be a strong year. Responding to guest expectations for new attractions and capital will be key for 2023 and beyond.





Museums

Because they are indoor, museums did not fare as well as outdoor parks in 2021. Though the top museums worldwide are up by 32% from 2020, attendance is still only 29% of 2019 levels. Many museums and their visitors tended to be more cautious with COVID, accounting for part of the disparity with other market segments. In fact, museums with outdoor elements such as sculpture gardens tended to see more attendance over the year.

Smartly, museums used the pandemic to create a wealth of digital programming in order to engage with guests remotely. The pivot to the electronic museum was swift and successful. We are already seeing a bounce back in attendance in 2022 and expect that to continue.



Smartly, museums used the pandemic to create a wealth of digital programming in order to engage with guests remotely.

Notes for the future

There are a few industry highlights worth considering while planning for the future. Immersive experiences are gaining in popularity. But what was once the realm of just theme parks and a few specialty attractions is now impacting a large swath of sectors, from zoos to retail to hospitality. Guest expectations for immersive experiences will continue to rise.

Premium experiences in attractions has always been a component of the industry; many parks have long offered up-charged VIP experiences for high end guests. But the larger industry is now looking for ways to provide for this market. In fact, part of the increase in per capita spending last year was due to capturing additional revenue streams from customers seeking more exclusive experiences.

The travel industry has faced significant challenges in the past two years. Clearly the demand for air travel is back, and airlines are sorting through the labor challenges to meet that demand. As they work through that, expect travel to largely return to normal patterns. This is good news for the attractions and leisure markets.

Our industry has proven to be resilient and did a very good job of managing during the worst of the pandemic. Operators are seeing positive signs of business improvement and are starting to reinvest now for a better visitor experience. I believe that our industry has an inherent mission to bring joy, excitement, and hope to people - particularly in times of struggle and adversity. Our industry delivered on that promise over the last few years, and we will continue to provide that during the next business cycle, and beyond.



Top 25 Amusement/Theme Parks Worldwide

2019 RANK	PARK LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	82%	12,691,000	6,941,000	20,963,000
2	DISNEYLAND PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	133%	8,573,000	3,674,000	18,666,000
3	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	51%	6,300,000	4,160,000	17,910,000
4	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	71%	5,800,000	3,400,000	14,650,000
5	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	12%	5,500,000	4,901,000	14,500,000
6	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	73%	7,194,000	4,166,000	13,888,000
7	EPCOT AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	92%	7,752,000	4,044,000	12,444,000
8	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	55%	7,452,000	4,797,000	11,736,000
9	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	134%	8,589,000	3,675,000	11,483,000
10	SHANGHAI DISNEYLAND AT SHANGHAI DISNEY RESORT, SHANGHAI,	54%	8,480,000	5,500,000	11,210,000
11	UNIVERSAL STUDIOS FLORIDA AT UNIVERSAL ORLANDO, FL, U.S.	119%	8,987,000	4,096,000	10,922,000
12	UNIVERSAL'S ISLANDS OF ADVENTURE AT UNIVERSAL ORLANDO, FL, U.S.	127%	9,077,000	4,005,000	10,375,000

2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

2019 RANK	PARK LOCATION	% CHANGE AS % OF 2019	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
13	DISNEYLAND CALIFORNIA ADVENTURE PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	159%	4,977,000	1,919,000	9,861,000
14	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	34%	3,500,000	2,620,000	9,745,000
15	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	324%	5,505,000	1,299,000	9,147,000
16	EVERLAND, GYEONGGI-DO, SOUTH KOREA	34%	3,710,000	2,760,000	6,606,000
17	LOTTE WORLD, SEOUL, SOUTH KOREA	58%	2,460,000	1,560,000	5,953,000
18	NAGASHIMA SPA LAND, KUWANA, JAPAN	50%	3,600,000	2,400,000	5,950,000
19	EUROPA-PARK, RUST, GERMANY	20%	3,000,000	2,500,000	5,750,000
20	OCEAN PARK, HONG KONG SAR	-36%	1,400,000	2,200,000	5,700,000
21	HONG KONG DISNEYLAND, HONG KONG SAR	65%	2,800,000	1,700,000	5,695,000
22	DE EFTELING, EFTELING THEME PARK RESORT, KAATSHEUVEL, NETHERLANDS	14%	3,300,000	2,900,000	5,260,000
23	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA- VALLEE, FRANCE	34%	1,884,000	1,410,000	5,245,000
24	OCT HAPPY VALLEY, BEIJING, CHINA	25%	4,930,000	3,950,000	5,160,000
25	CHIMELONG PARADISE, GUANGZHOU, CHINA	45%	3,890,000	2,681,000	4,905,000
TOP 25 TOTAL ATTENDANCE 2021		70%	141,351,000	83,258,000	253,724,000
TOP 25 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					56%

© 2021 TEA / AECOM

70%

Top 25 amusement/theme parks worldwide attendance change 2020–21

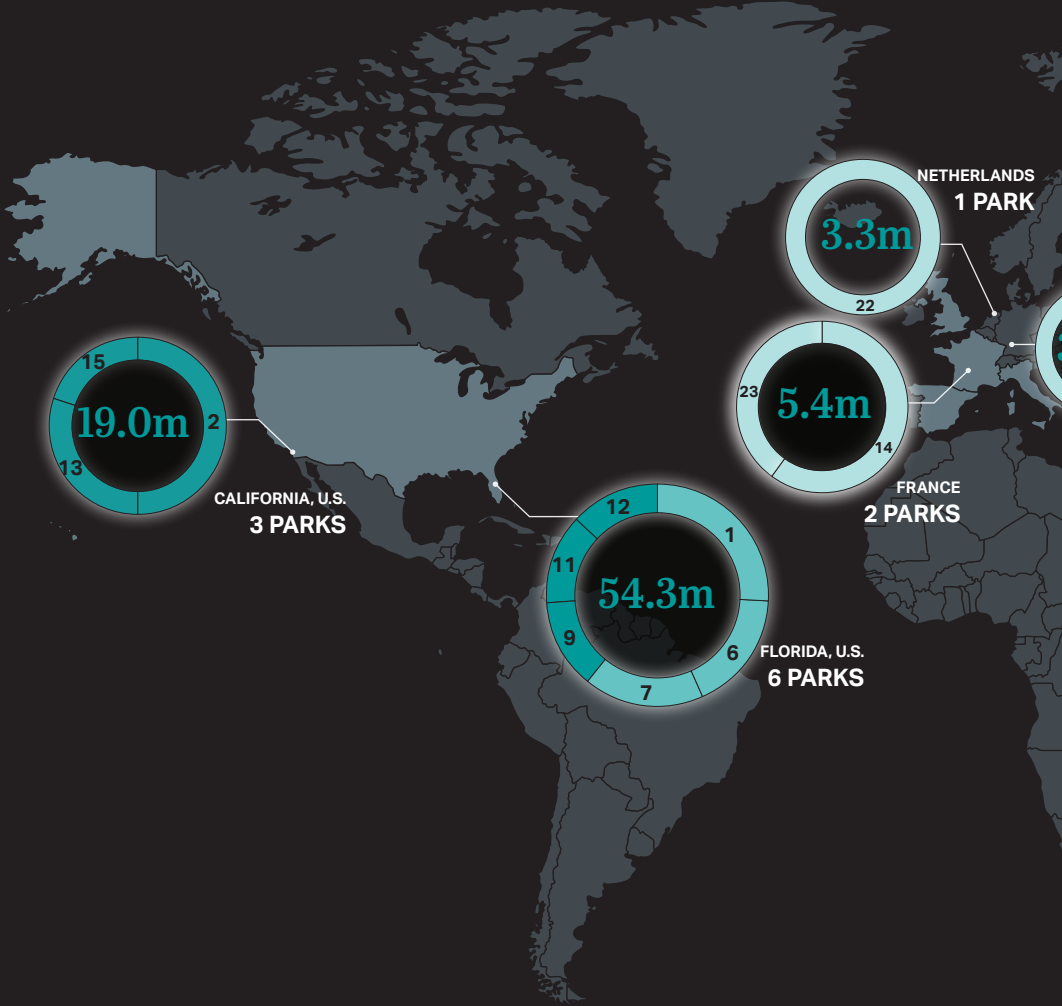
141.4m

Top 25 amusement/theme parks worldwide attendance 2021

83.3m

Top 25 amusement/theme parks worldwide attendance 2020

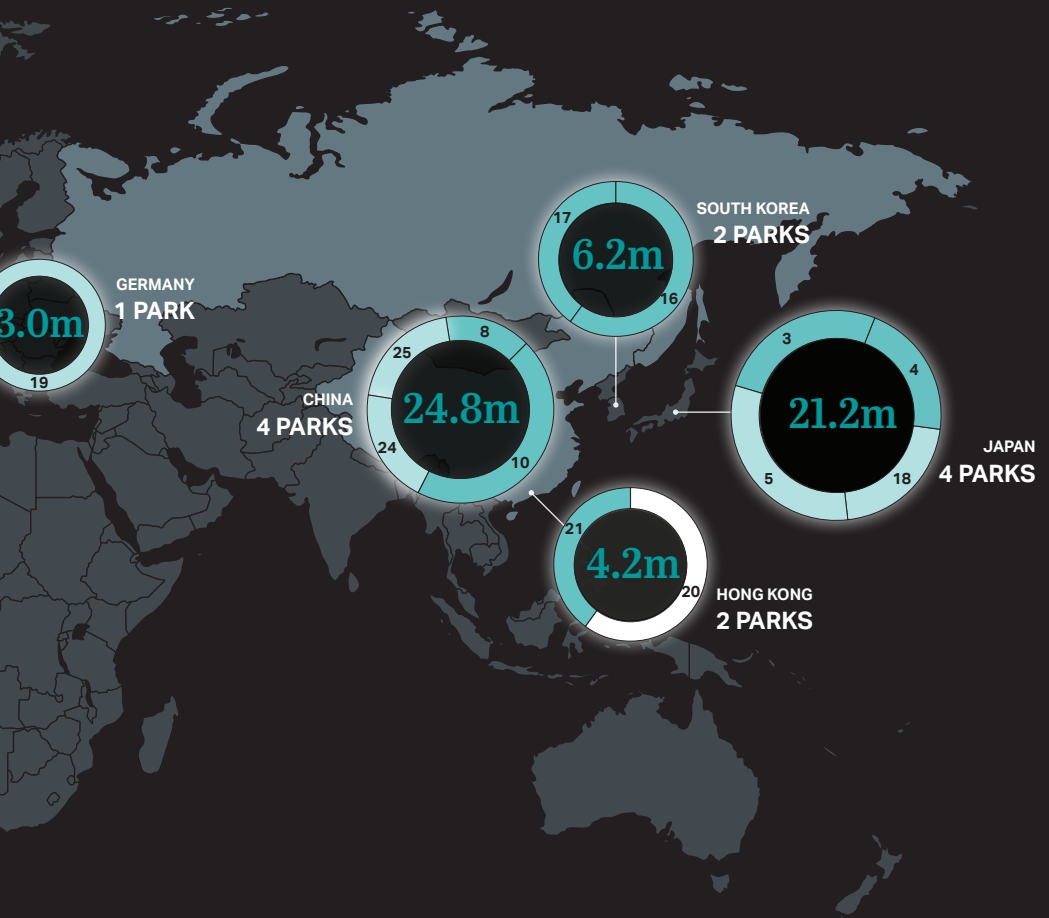
Top 25 Amusement/Theme Parks Worldwide



Key

- < 0 %
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.



70%

Top 25 amusement/theme parks worldwide attendance change 2020–21

141.4m

Top 25 amusement/theme parks worldwide attendance 2021

83.3m

Top 25 amusement/theme parks worldwide attendance 2020

The Americas

A New Normal... or a Moment in Time?

As many expected, 2021 was a year of recovery from the COVID-19 pandemic.

This was true for theme parks and water parks in North and South America, albeit uneven depending on government protocols, strength of local and tourist markets, and the individual strategies pursued by park operators. However, as vaccine rollout expanded, capacity restrictions loosened, and consumers' attitudes towards traveling and gathering shifted, one pattern seemed to ring true across the board: that attendance trended upward from the beginning of 2021 to the end of the year.

The 2021 post-Covid recovery story for theme parks and water parks in the Americas is marked by several major trends. Some of these trends emerged as operators reacted to an ever-changing web of government restrictions and diverse ideas on what consumer behavior and societal priorities should be in a pandemic; but some of these trends may be viewed as an accelerated response to cultural and generational shifts long in the making. The trends in the following pages characterize the Americas in 2021, but the jury is still out if they point to a new normal in the way we operate and experience theme parks, or if they just capture this moment in time.



Francisco Refuerzo

Senior Analyst,
AECOM Economics + Advisory



Rollercoaster of Recovery

Summer 2020 saw a downward trend in COVID-19 cases, ushering in a period of hope for the theme park industry as some governments cautiously allowed theme parks to reopen with varying degrees of capacity restrictions. Holiday spikes and new variants would soon bring a new wave of closures and lockdowns that prevented large events and indoor gathering in some

places. The year 2021 got off to a rocky start for theme park attendance as some parks were closed and others operated under government- or self-imposed capacity restrictions. But attendance accelerated quickly around the start of the summer season, and by the last quarter of 2021 some park operators were reporting attendance that reached pre-pandemic levels.



Shark Encounter at SeaWorld,
San Diego, California
© SeaWorld Entertainment

By July 2021, all of the top 20 theme parks in North America were in operation, and their collective attendance for 2021 amounted to 136% year-over-year growth, the biggest gain for theme parks across the other major regions. The top 20 water parks in North America had an even stronger showing with collective 2021 attendance up by 177% over 2020. Latin America's top theme parks and water parks posted attendance growth of 54% and 74%, respectively, over the previous year—less shocking than triple-digit growth, yet anything but modest.

Major operators had the difficult task of navigating layers of government restrictions and supporting the reopening of multiple parks, sometimes under wildly different state policies and timelines. Comparing Universal's Florida and California parks offers a clear example. All of Universal's Orlando and Hollywood parks operated without capacity limits in the third quarter of 2021, but Florida had state-level restrictions lifted earlier in the year, resulting in those parks performing better.

Canada's Wonderland was the last theme park in the North America top 20 to start operations in 2021 and was also closed longer than any park on the region's list—the park typically closes for winter

and had last been open in 2019. Provincial policies provided the park with several false starts for reopening in 2021, pushing the date from May to June to July, and leaving fans frustrated. Mexico also had strong park restrictions—Six Flags Mexico suspended operations in December 2020, but reopened in March 2021 with the government allowing operations at 20% capacity and limiting visitor access to outdoor areas only.

The US market stood out with theme park attendance increasing by 134% over 2020 figures. US theme park attendance was at 67% of 2019's peak numbers.

104.4m

Top 20 theme parks in North America attendance 2021

44.3m

Top 20 theme parks in North America attendance 2020

“

Major operators had the difficult task of navigating layers of government restrictions and supporting the reopening of multiple parks, sometimes under wildly different state policies and timelines.



Homecoming

Theme parks placed extra emphasis on their local markets in 2021, an effort to build up a loyal and lucrative base of repeat visitors. In some ways, the pandemic strengthened theme parks as a regional destination, a nostalgic, affordable, and safe outdoor alternative to destinations that require traveling.

International attendance, a factor for many of the destination parks, has been slower to recover. Until mid-2022, complicated COVID testing requirements hindered international travel to many destinations, including the US. According to Visit Orlando, international traffic made up 9% of visitors in 2019; in 2021 it was 4%. Not surprisingly, combined domestic and international travel to Orlando in 2021 was at 78% of 2019 levels, which aligns with attendance percentage reporting from central Florida's theme parks. International traffic is expected to return to pre-pandemic levels near the end of 2022, although a strengthening US dollar makes travel more expensive for overseas visitors planning to visit the parks on our Top 20 list.

Season passes played an important role

in the recovery. Nearly every major park took pandemic closures as an opportunity to review and rethink their approach to season passes. Some operators like Six Flags offered steep discounts to their pass program to entice people to come back. Others, like Disney, completely revamped their season passes and raised prices in the process. Universal Orlando offered ticketing and pass deals aimed at Florida residents in an effort to make up for the lack of international traffic. The focus on season pass sales were largely effective. SeaWorld Entertainment, for example, saw a 10% drop in general attendance from 2019 to 2021, but their season pass base was only down 3% for the same time frame.

Cedar Fair's Ohio parks (Cedar Point and Kings Island) were very successful in 2021, likely due to a combination of fewer opening restrictions and active local markets. Both were certainly helped by their reputations as regional destination parks. Visitors still not ready to hop on an airplane were likely more willing to take a road trip to a high-profile regional park. Cedar Point also offered a new season pass program that functioned more like a regional pass, extending its reach beyond core markets.

Betting Big on Intellectual Property

The dependence on Intellectual Property (IP) within the industry is expanding. Long a staple in major park attractions, IP is emerging in other forms of entertainment like family entertainment centers, waterparks, cafes, and hotels. Following its successful 2019 debut of the Star Wars: Galaxy's Edge themed area, Disney launched the Avengers Campus at California Adventure in 2021, with planned campuses opening in Paris (2022) and Hong Kong (2023).

IP is becoming increasingly important in the way we connect with and create experiences at theme parks. Consumers have strong connections with IP that transcend continents. Super Nintendo World opened at Universal Studios Japan in 2021 to rave reviews and will be replicated at its Hollywood and future Epic Universe parks. The park also opened

the DreamWorks Destination attraction, where guests can meet and interact with DreamWorks characters. Universal Studios Hollywood opened the Thea-awarded Secret Life of Pets dark ride, which was ready in 2020 but held until more favorable operating conditions. That park saw a 323% increase over 2020.

Unexpected COVID Side-effects

Since 2020, parks have had to think quick and make serious adjustments to their operations to safely accommodate visitors. Parks had to adapt to find operational efficiencies. Technologies like touchless payment and digital queueing were introduced to help comply with COVID protocols but they also provided better experiences for guests and tended to increase per capita spending. Though parks were already heading in this direction, the pandemic accelerated the trend.



Secret Life of Pets: Off the Leash, Universal Studios Hollywood
© Universal Parks & Resorts



Dynamic pricing and advance reservation systems were a way for parks to regulate attendance in their limited capacities, but have also proven to increase profitability. Consumers have become accustomed to advanced ticketing systems during the pandemic.

Labor availability and cost continued to be an issue for operators in 2021. Many parks enhanced their recruitment offerings or turned to technology. Kings Dominion adjusted their operating schedule to account for the reduced workforce, while SeaWorld implemented automation where possible to reduce the need for workers.

Parks took this time to evaluate how to improve the guest experiences and make strategic investments in order to maintain or enhance their market position. Sea World launched new iOS and Android apps in 2021 for each of its parks, but unlike other operators, SeaWorld chose to delay nearly all their capital investments for 2020 and 2021 until 2022. The decision has paid off in the longer term as the chain has seen strong attendance gains for 2022.

Just before the pandemic, Six Flags announced a transformation plan to modernize its guest experience and reinvigorate growth, but it has since used the time to assess some of its previous products and strategies, such as pricing and membership programs, finding that discounted ticketing was great for attendance but attracted too many teenagers with limited in-park spending potential. In addition to spending \$122 million on new projects and attractions in 2022, the operator is now making changes to operations and products, hoping that a "customer-obsessed" culture will improve its competitive position.

Hey, big spender

Despite lower attendance levels relative to 2019, reported revenues continue to rival and in some cases surpass equivalent quarters from 2019. Financial reports indicated dramatic increases in per capita spending at 19 of the top 20 North American parks. The increase was in part due to pent-up demand from park closures during the pandemic, increased savings from less travel and entertainment costs

during lockdown, and inflation.

But the parks have also figured out how to increase revenues: they adjusted their pricing, promoted advance ticket sales, and offered new and elevated merchandise and food options. In Q4, Walt Disney World debuted Genie+, an automated app that provides personalized itineraries for guests, effectively replacing the resort's free FastPass program with a tiered system that offers a base level of complimentary services and paid premium access for additional benefits.

This trend is probably the most significant from an operational standpoint. Increased spending will generate revenue growth that

“

Financial reports indicated dramatic increases in per capita spending at 19 of the top 20 North American parks.



will allow parks to invest in new attractions and experiences that keep visitors coming back. Whether increased spending represents a lasting evolution in consumer behavior or if it was just a side-effect of recovering from a pandemic may not matter, because these parks have weathered the perfect storm, and in the process have become really savvy at giving guests what they want.

North America Theme Parks

There were a few big anniversaries in 2021. Disney began celebrating the Walt Disney World Resort's 50th anniversary in October of 2021 with the debut of Remy's Ratatouille Adventure dark ride in the France pavilion at Epcot. New evening spectaculars, Disney Enchantment at Magic Kingdom and Harmonious at Epcot, also opened to celebrate the milestone. Cedar Point reached 150 years in 2020, but its major celebrations were postponed to 2021. Additionally, Knott's Berry Farm celebrated its 100th anniversary in 2021.

Legoland New York is the most significant theme park to debut in 2021. Although it is Legoland's first US park opening in 20 years, attention surrounding its opening seems to have been overshadowed by COVID-19 media coverage and other world events. SeaWorld redeveloped its Aquatica San Diego property into Sesame Place San Diego, which opened in 2022. Universal's debut of the high-speed Jurassic Park-themed Velocicoaster at Islands of Adventure in Orlando helped to boost attendance at that park ahead of Universal Studios Florida. Parks in development include Universal's Epic Universe in Orlando, set to open in 2025.

Latin America Theme

Parks

Two of Latin America's top 10 theme parks were permanently closed in 2021. La Feria de Chapultepec in Mexico City closed in 2019 and is being redeveloped as Parque Urbano Aztlan, a new amusement park and public space that offers free admission, although some attractions will require visitor payment. The other park is Parque Plaza Sesamo in Monterrey, which has been rebranded as Parque Fiesta Aventuras.

Six Flags Mexico City remains a top park in the region after debuting CraZanity, the world's largest pendulum ride, reaching a record height of 50 meters and speeds of 120kph. Beto Carreo World, which has held the title of largest theme park in Latin America, achieved another superlative in 2021—its estimated attendance of 1.90 million is the highest amongst the top 10 theme parks in the region.

Water Parks

In general, individual water parks did better than theme parks because their shorter seasons more closely aligned with increased vaccine availability, easing of COVID restrictions, and pre-Omicron optimism.

In the US, the top two waterparks are at Disney World Resort. Disney made the strategic decision to close one during the pandemic years and operate the other to cut costs. The #1 park in 2019, Typhoon Lagoon was closed for all of 2020 and 2021. At the start of 2022, Blizzard Beach closed and Typhoon Lagoon reopened.

In Latin America, water parks compete more evenly with theme parks than they do in the

US, in part because there is not a dominating group of large operators in the region.

A notable exception includes Mexico-based operator Grupo Xcaret, which is set to open Xibalbá Park in 2022. This new park will join a growing ecosystem of seven existing parks along the Riviera Maya, the flagship of which is Xcaret Park, the third-ranked theme park in Latin America. Grupo Xcaret's properties are part theme park, part water park, and part nature park - a concept that they continue to expand with significant investments. The operator opened two new luxury adults-only hotels in 2021, part of its plan to expand to 5,400 rooms in seven years.

Major investments in hotels and parks are also being developed across the Caribbean. In the Bahamas, Baha Bay, a 15-acre beachfront waterpark t attached to the all-inclusive Baha Mar Resort, opened in 2021. In the Dominican Republic, work began on El Dorado Park , which is being billed as the largest water park compound in the Caribbean.

10.7m

Top 20 water parks in North America attendance 2021

3.8m

Top 20 water parks in North America attendance 2020

7.0m

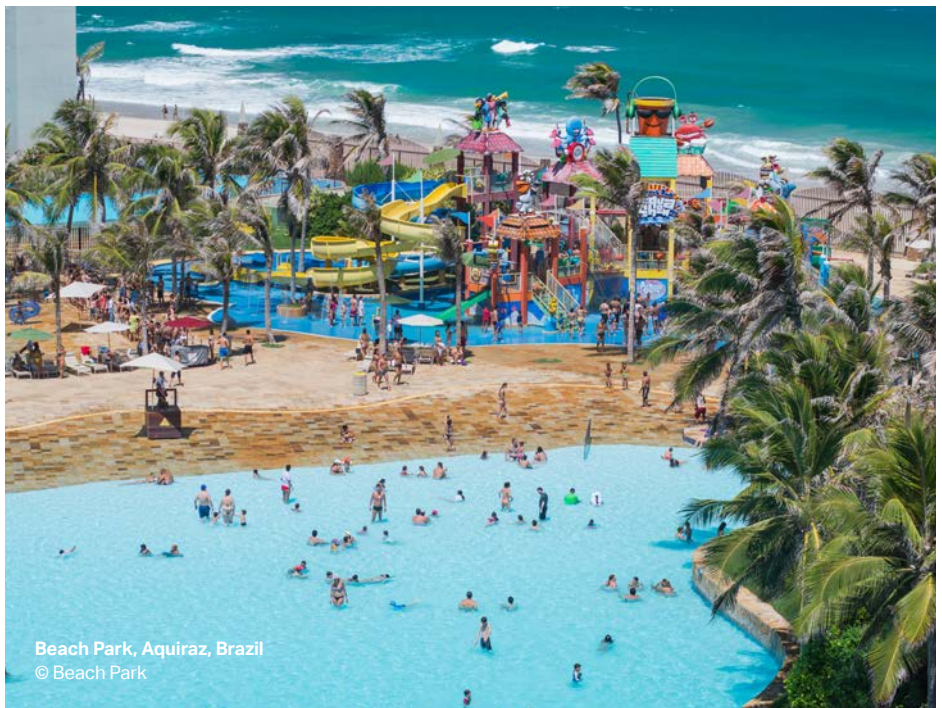
Top 10 water parks in Latin America attendance 2021

4.0m

Top 10 water parks in Latin America attendance 2020

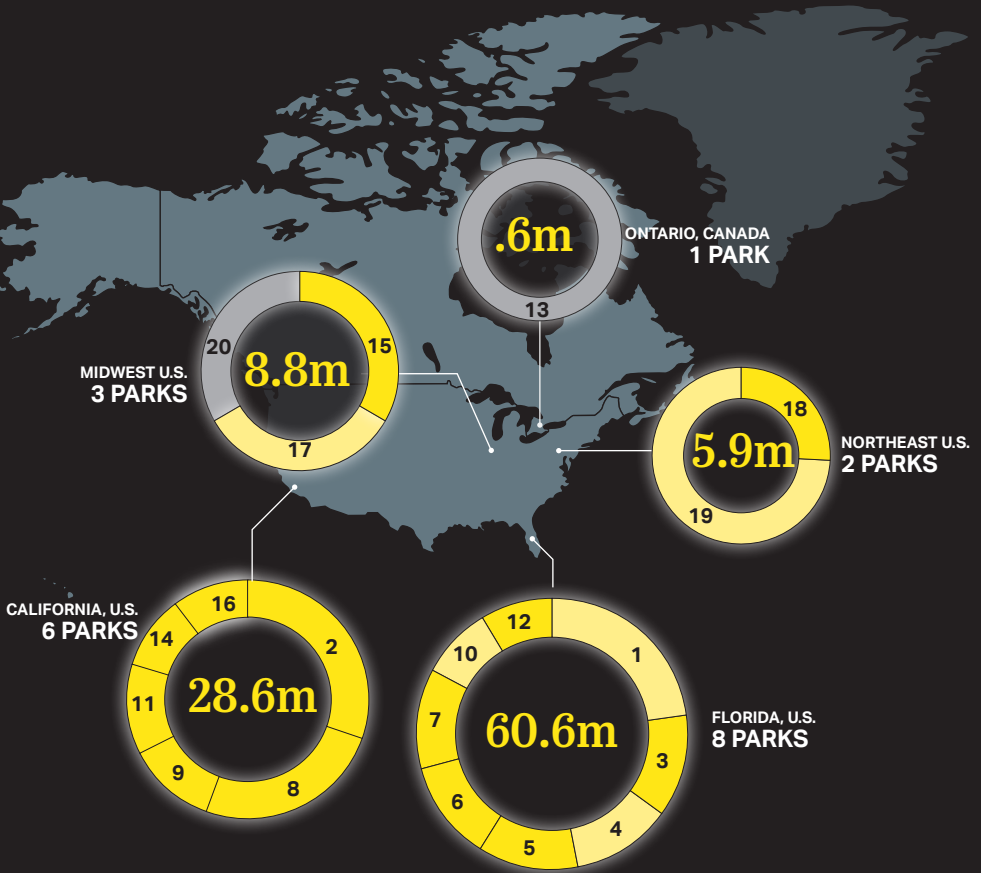


Typhoon Texas, Katy, TX
© Pyek Group



Beach Park, Aquiraz, Brazil
© Beach Park

Top 20 Amusement/Theme Parks North America



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0 %
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	83%	12,691,000	6,941,000	20,963,000
2	DISNEYLAND PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	133%	8,573,000	3,674,000	18,666,000
3	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	73%	7,194,000	4,166,000	13,888,000
4	EPCOT AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	92%	7,752,000	4,044,000	12,444,000
5	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	134%	8,589,000	3,675,000	11,483,000
6	UNIVERSAL STUDIOS FLORIDA AT UNIVERSAL ORLANDO, FL, U.S.	119%	8,987,000	4,096,000	10,922,000
7	UNIVERSAL'S ISLANDS OF ADVENTURE AT UNIVERSAL ORLANDO, FL, U.S.	127%	9,077,000	4,005,000	10,375,000
8	DISNEY CALIFORNIA ADVENTURE PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	159%	4,977,000	1,919,000	9,861,000
9	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	324%	5,505,000	1,299,000	9,147,000
10	SEAWORLD ORLANDO, ORLANDO, FL U.S.	91%	3,051,000	1,598,000	4,640,000
11	KNOTT'S BERRY FARM, BUENA PARK, CA U.S.	354%	3,681,000	811,000	4,238,000
12	BUSCH GARDENS TAMPA BAY, TAMPA, FL U.S.	149%	3,210,000	1,288,000	4,180,000
13	CANADA'S WONDERLAND, MAPLE, ONTARIO, CANADA	-	587,000	-	3,950,000
14	SEAWORLD SAN DIEGO, SAN DIEGO, CA, U.S.	146%	2,800,000	1,139,000	3,731,000
15	CEDAR POINT, SANDUSKY, OH, U.S.	187%	3,327,000	1,020,000	3,610,000
16	SIX FLAGS MAGIC MOUNTAIN, VALENCIA, CA, U.S.	344%	3,047,000	686,000	3,521,000
17	KINGS ISLAND, KINGS ISLAND, OH, U.S.	96%	3,181,000	1,626,000	3,485,000
18	SIX FLAGS GREAT ADVENTURE, JACKSON, NJ, U.S.	387%	2,913,000	598,000	3,451,000
19	HERSHEYPARK, HERSHEY, PA, U.S.	75%	3,012,000	1,717,000	3,384,000
20	SIX FLAGS GREAT AMERICA, GURNEE, IL, U.S.	-	2,675,000	-	3,169,000
TOP 20 TOTAL ATTENDANCE 2021		136%	104,427,000	44,302,000	159,108,000
TOP 20 TOTAL ATTENDANCE AS% OF 2019 (PRE-PANDEMIC)					66%

© 2021 TEA / AECOM

136%

Top 20 amusement/theme parks North America attendance change 2020-21

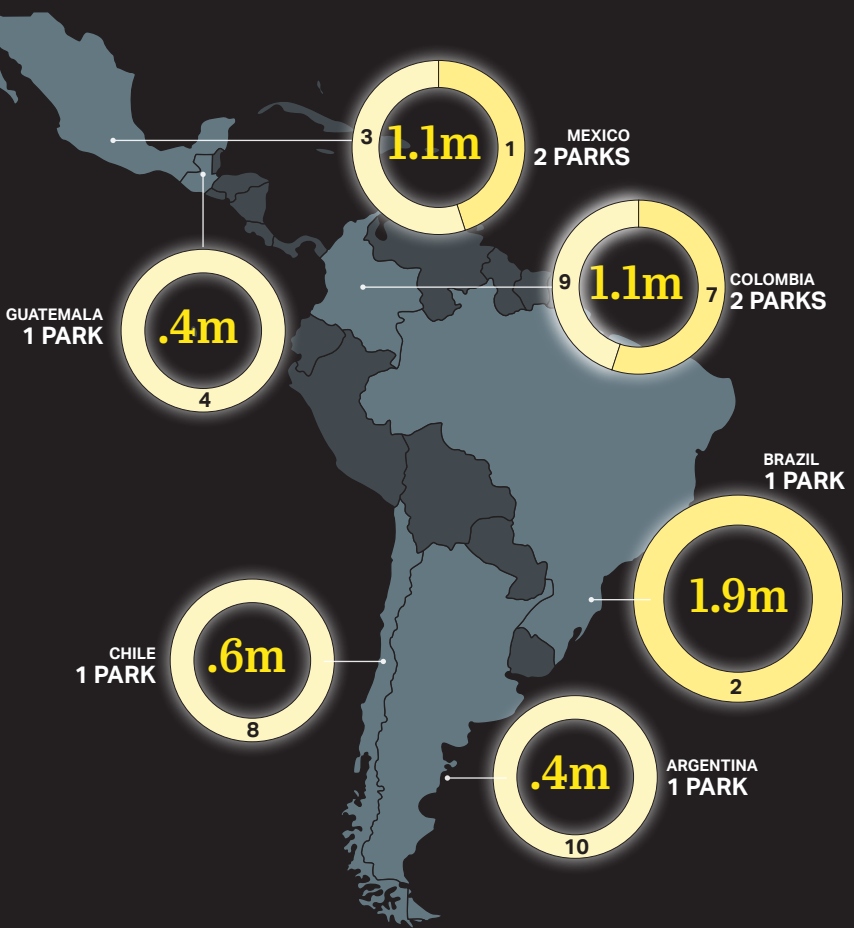
104.4m

Top 20 amusement/theme parks North America attendance 2021

44.3m

Top 20 amusement/theme parks North America attendance 2020

Top 10 Amusement/Theme Parks Latin America



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0 %
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	SIX FLAGS MEXICO, MEXICO CITY, MEXICO	60%	1,125,000	701,000	2,803,000
2	BETO CARRERO WORLD, SANTA CATARINA, BRAZIL	51%	1,895,000	1,252,000	2,241,000
3	PARQUE XCARET, CANCUN, MEXICO	50%	1,104,000	736,000	1,960,000
4	MUNDO PETAPA, GUATEMALA CITY, GUATEMALA	50%	402,000	268,000	1,330,000
5	LA FERIA DE CHAPULTEPEC, MEXICO CITY, MEXICO	-	-	-	1,306,000
6	PLAZA DE SESAMO, MONTERREY, MEXICO	-	-	-	1,173,000
7	PARQUE MUNDO AVENTURA, BOGOTÁ, COLOMBIA	83%	631,000	344,000	1,151,000
8	FANTASIALANDIA, SANTIAGO, CHILE	43%	615,000	430,000	1,100,000
9	THEME PARQUE NACIONAL DEL CAFÉ, QUINDIO, COLOMBIA	50%	482,000	321,000	1,043,000
10	PARQUE DE LA COSTA, BUENOS AIRES, ARGENTINA	50%	395,000	263,000	968,000
TOP 10 TOTAL ATTENDANCE 2021		54%	6,649,000	4,315,000	15,075,000
TOP 10 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					44%

© 2021 TEA / AECOM

54%

Top 10 amusement/theme parks Latin America attendance change 2020-21

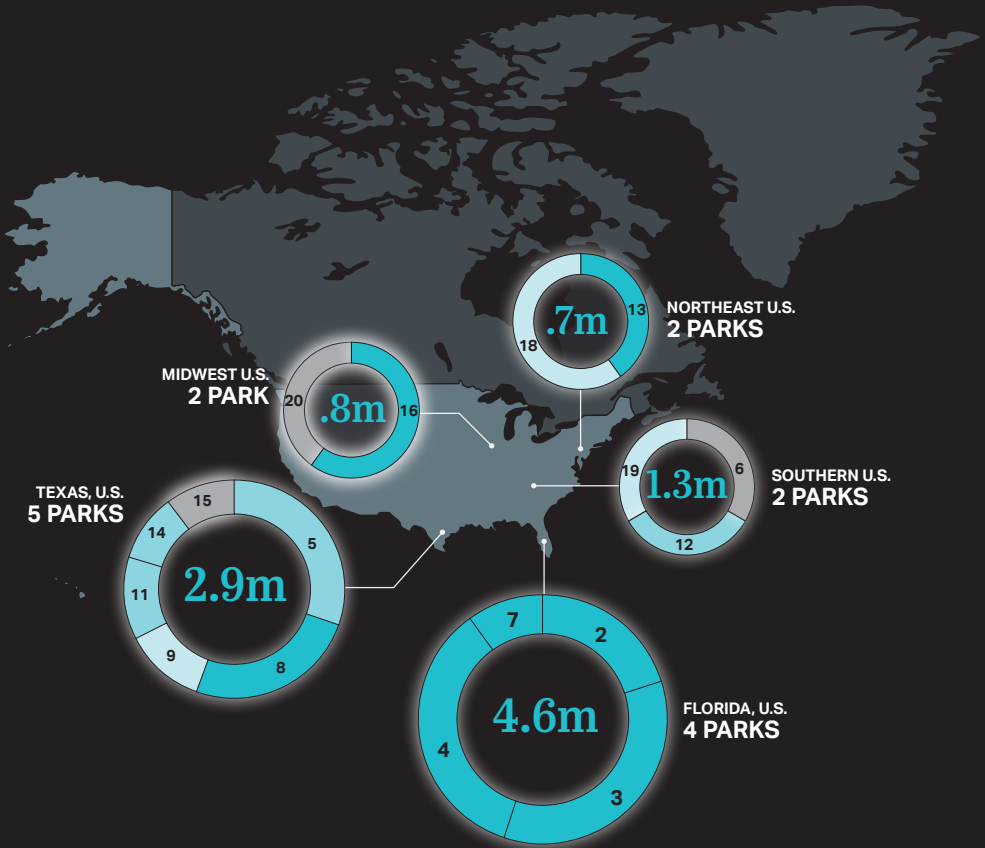
6.6m

Top 10 amusement/theme parks Latin America attendance 2021

4.3m

Top 10 amusement/theme parks Latin America attendance 2020

Top 20 Water Parks North America



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0 %
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	DISNEY'S TYPHOON LAGOON WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	-	-	-	2,248,000
2	DISNEY'S BLIZZARD BEACH WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	280%	1,201,000	316,000	1,983,000
3	UNIVERSAL'S VOLCANO BAY, ORLANDO, FL, U.S.	207%	1,691,000	551,000	1,811,000
4	AQUATICA, ORLANDO, FL, U.S.	117%	1,147,000	528,000	1,533,000
5	SCHLITTERBAHN, NEW BRAUNFELS, TX, U.S.	97%	888,000	451,000	996,000
6	WATER COUNTRY USA, WILLIAMSBURG, VA, U.S.	-	700,000	-	736,000
7	ADVENTURE ISLAND, TAMPA, FL, U.S.	374%	593,000	125,000	656,000
8	AQUATICA SAN ANTONIO, SAN ANTONIO, TX, U.S.	123%	586,000	263,000	651,000
9	SCHLITTERBAHN, GALVESTON, TX, U.S.	19%	402,000	337,000	567,000
10	SPLISH SPLASH, CALVERTON NY, U.S.	-	-	-	542,000
11	SIX FLAGS-HURRICANE HARBOR, ARLINGTON, TX, U.S.	60%	377,000	235,000	538,000
12	SIX FLAGS WHITE WATER ATLANTA, MARIETTA, GA, U.S.	55%	368,000	238,000	526,000
13	SIX FLAGS HURRICANE HARBOR, JACKSON, NJ, U.S.	427%	448,000	85,000	482,000
14	TYPHOON TEXAS, KATY, TX, U.S.	67%	340,000	203,000	478,000
15	SIX FLAGS HURRICANE HARBOR SPLASHTOWN, SPRING, TX, U.S.	-	333,000	-	475,000
16	ZOOMBEZI BAY, POWELL, OH, U.S.	112%	373,000	176,000	466,000
17	SIX FLAGS HURRICANE HARBOR PHOENIX, GLENDALE, AZ, U.S.	-	309,000	-	441,000
18	CAMELBEACH, TANNERSVILLE, PA, U.S.	49%	225,000	151,000	439,000
19	DOLLYWOOD'S SPLASH COUNTRY, PIGEON FORGE, TN, U.S.	49%	281,000	188,000	433,000
20	CEDAR POINT SHORES, SANDUSKY, OH, U.S.	-	402,000	-	424,000
TOP 20 TOTAL ATTENDANCE 2021		177%	10,664,000	3,847,000	16,425,000
TOP 20 ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					70%

177%

Top 20 water parks North America attendance change 2020-21

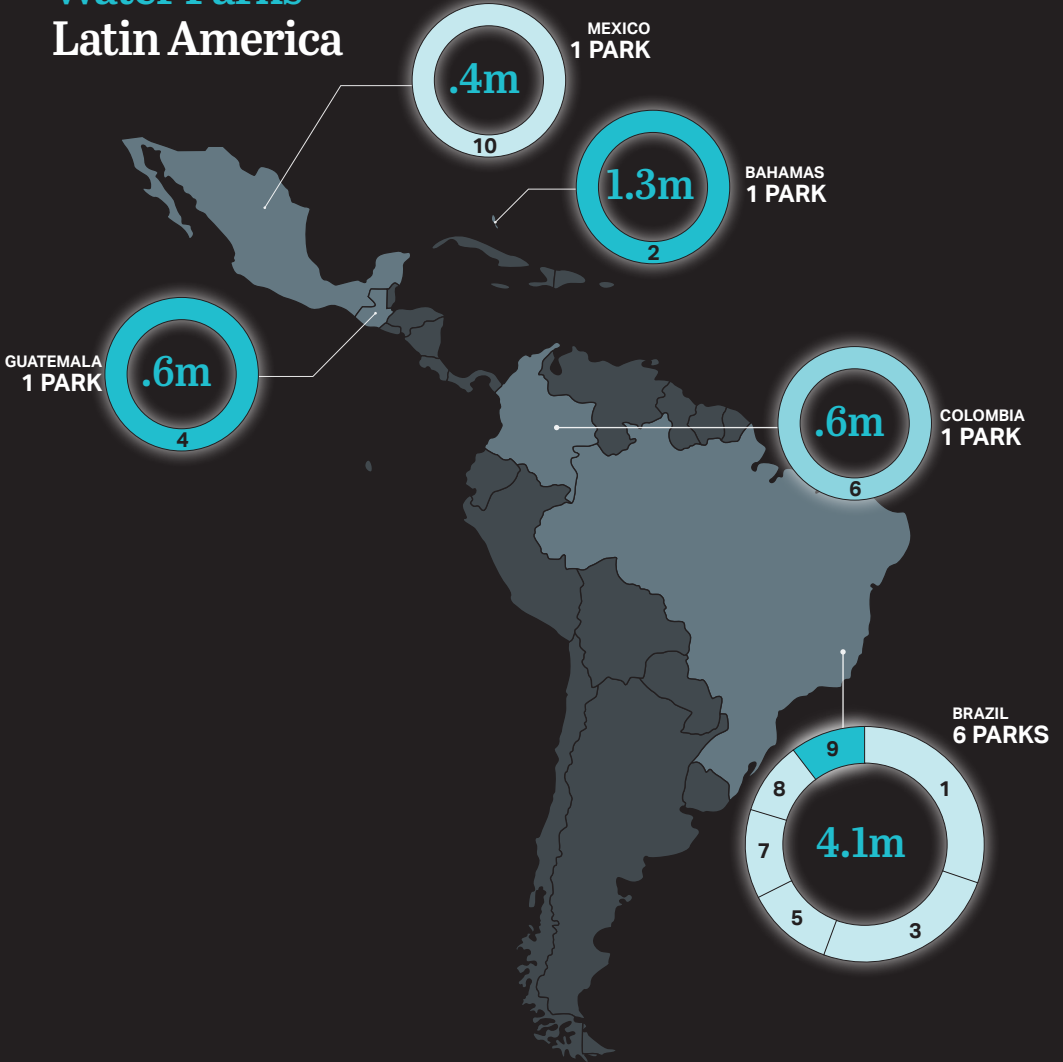
10.7m

Top 20 water parks North America attendance 2021

3.8m

Top 20 water parks North America attendance 2020

Top 10 Water Parks Latin America



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0%
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	28%	1,179,000	922,500	1,845,000
2	BAHAMAS AQUAVENTURE WATER PARK, PARADISE ISLAND (NASSAU, NEW PROVIDENCE), BAHAMAS	157%	1,269,000	494,000	1,813,000
3	HOT PARK RIO QUENTE, CALDAS NOVAS, BRAZIL	27%	933,000	734,500	1,469,000
4	PARQUE ACUATICO XOCOMIL, SAN MARTÍN ZAPOTITLÁN, RETALHULEU, GUATEMALA	417%	626,000	121,000	894,000
5	BEACH PARK, AQUIRAZ, BRAZIL	60%	500,000	312,000	890,000
6	PISCILAGO, GIRARDOT (BOGOTA), COLOMBIA	98%	609,000	307,000	876,000
7	MAGIC CITY WATER PARK, SUZANO, BRAZIL	32%	467,000	355,000	681,000
8	THERMAS WATER PARK, SÃO PEDRO, BRAZIL	43%	452,000	315,000	641,000
9	HOT BEACH, OLYMPIA, BRAZIL	144%	594,000	243,200	608,000
10	PARQUE ACUATICO EL ROLLO, MORELOS, MEXICO	75%	368,000	210,000	525,000
TOP 10 TOTAL ATTENDANCE 2021		74%	6,997,000	4,014,200	10,242,000
TOP 10 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					68%

© 2021 TEA / AECOM

74.0%

Top 10 water parks
Latin America attendance
change 2020-21

7.0m

Top 10 water parks
Latin America attendance
2021

4.0m

Top 10 water parks
Latin America attendance
2020

Asia-Pacific

Industry recovery from the pandemic in the APAC region was uneven, compared to other parts of the world. In 2021 governments across the region responded differently to new variants of COVID-19. Some countries alternated between opening and closing parks.

Others were able to operate nearly the whole year - although with restricted daily attendance. Shanghai Disneyland, for example, only closed for two days in 2021 but had strict daily capacity limits in place most of the year.

Generally, when restrictions were lifted people returned to attractions. If the timing coincided with holidays or vacation periods, attractions benefited even more. International and regional travel restrictions continued to impact the pool of tourists any given park could attract. Attractions that typically source a more local audience were able to do better than those that rely on visitors from afar. Around the region, attendance was anywhere from 40%-80%, averaging 50%, of 2019 levels.

Looking ahead, it's not certain when a return to normal travel patterns will resume, particularly in China. In 2022 Shanghai was put in a months-long lockdown as China doubled down on its zero-COVID policy. As of this writing, parks and attractions around the region continue to be affected by local government policies and regional travel restrictions limiting the flow of tourists. The outlook is more optimistic in Southeast Asia, where countries are aligning their COVID policies more closely with Europe and North America.



Beth Chang

Executive Director –
Economics, Asia-Pacific



Chris Yoshii

Vice President – Economics,
Asia-Pacific





Mickey and Friends celebrate the 20th Anniversary of Tokyo DisneySea
© Disney

Transformers Metrobase - Decepticoaster
© Universal Parks & resorts.



Asia's theme parks and water parks

China

China's combined attendance numbers were about 50 to 55% of pre-pandemic levels, roughly equivalent to the size of China's market share back in 2014-2015. This is an improvement from 2020 and highlights just how rapidly the Chinese attractions market grew in the years leading up to the pandemic.

The figures, though a move in the right direction, don't necessarily equate to a healthy financial recovery. Local governments in China, like some other countries, offered subsidies to parks that incentivized deep discounting of tickets. These subsidies helped artificially boost attendance in the short term.

The late September 2021 opening of Universal Studios Beijing (USB) was highly anticipated, marking the second major western theme park company to open a resort in mainland China. The market responded positively. Notably, park guests enjoyed interactions with Megatron, a TRANSFORMERS character well-suited to Beijing's style of humor. To control the pandemic and ensure a safe winter Olympics, the Beijing government discouraged domestic tourism to Beijing, which negatively impacted USB. The park is poised to increase its numbers significantly once travel restrictions are fully lifted.

Though not in the ranking charts, the pandemic appears to have initiated one of the first merger/acquisitions in China's rapidly growing (though still young) theme park industry. In December 2021, Haichang

Group sold four existing parks and one park under development to North Asia private equity group MBK Partners. Haichang will continue to manage the sold parks for MBK and retains ownership of one park in a new asset light business model seemingly favored by other operators, such as Fantawild.

OCT Group posted an 11% increase over 2020, approaching 97% of pre-pandemic levels. The boost came from the addition of nine new mid-sized properties combined with the company's practice of extensive promotions and complimentary admissions.

Fantawild has continually been expanding and upgrading their theme entertainment parks and offerings. Since 2017 Fantawild has focused its efforts on building new parks for local governments that own the properties and pay Fantawild to operate

them. They closed three of their legacy properties and opened four new parks using this model in 2021, bringing their combined attendance figures to 91% of pre-pandemic levels. This asset light model is expected to become commonplace in the future.

Japan

Disney's two parks in Japan were subject to strict attendance limits for most of 2021. Attendance caps varied throughout the year, being as low as 5,000 guests per park

“

China's combined attendance numbers were about 50 to 55% of pre-pandemic levels.



Shanghai Disneyland, Shanghai, China
© Disney

OCT's 5,000-square-meter immersive attraction based on CCTV's TV show "National Treasure" Jinan China

per day at some points. Tokyo DisneySea's 20th anniversary celebration buoyed attendance significantly by the end of the year. Though only at 40% of pre-pandemic levels, guests are eager to return to the parks as attendance caps are lifted. The largest expansion ever for Tokyo DisneySea is well underway. This new land, Fantasy Springs, will feature Frozen Port, Alice in Wonderland, Beauty & the Beast, and more. The expansion is an indication of the ongoing confidence of the Japanese market as well as the Asian regional destination market.

Universal Studios Osaka opened Super Nintendo World in March, 2021 to great fanfare and success. This major investment received very positive reviews and is expected to continue to be a major draw for the park, as the gamification elements incorporated into the land help drive repeat visitation. Due to the popularity of

the new land, a free timed entry system was introduced. With limits on park entry imposed, the success of the new land has not yet reflected on the attendance number. Riding on the success of Super Nintendo World, the park is in the process of adding the world's first Donkey Kong-themed area, set to open in 2024. The new section will increase Super Nintendo World by another 70%. Additionally, Universal Studios Osaka maintains a very vibrant and popular annual pass program with local youth making the park a top choice for social outings with friends.

Hong Kong

Ocean Park's long-awaited indoor/outdoor waterpark opened in September 2021, transforming the property into a multi-gate resort. With the waterpark open, Ocean Park turned its attention to the original theme





park, initiating a bidding process in 2021 for private investors to take over areas of the property, eventually transforming the lower park area into a commercial zone anchored by retail, dining, and entertainment.

Hong Kong Disneyland, deprived of mainland and international visitors, set records for season pass sales as the park focused on local residents. The park achieved a nearly 40% penetration rate in the local market, a rather impressive feat, given that government COVID regulations there were more strict than any of Disney's other properties around the world. The resort also continued along its multi-year expansion process. Hong Kong Disneyland

opened their completely redeveloped Castle of Magical Dreams in 2021 and is building a new Frozen-themed land to open soon. More Marvel theme attractions are planned in the future.

Southeast Asia

Southeast Asia was dramatically impacted by COVID in 2021 which resulted in movement restrictions and lockdowns in many countries. Theme park visitation was generally quite muted in the region. Most Southeast Asia countries have now changed their policies and theme park visitation is expected to rebound significantly in 2022.

Regional Theme Park Pipeline

The regional pipeline for new investments in theme parks and theme park lands remains strong although delays in opening dates have become common. Genting SkyWorld opened in February 2022 while Legoland Korea opened in May 2022. New construction is underway for major new lands at Universal Studios Singapore, Hong Kong Disneyland, Shanghai Disney Resort, and Tokyo DisneySea, among others. Legoland has announced three new theme park resorts in China in Shenzhen, Shanghai and Chengdu.

In contrast, theme park projects by Chinese real estate developers have largely been suspended as financial troubles limit new construction projects.

“

Hong Kong Disneyland achieved a nearly 40% penetration rate in the local market, a rather impressive feat, given that government COVID regulations there were more strict than any of Disney's other properties around the world.

50-55%

China's combined attendance numbers were about 50 to 55% of pre-pandemic levels



Water parks

Water parks in the region were subject to many of the same COVID restrictions as theme parks. As governments relaxed policies, demand spiked. Countries that kept restrictions in place negatively impacted water parks. Several parks in China, Korea and Indonesia saw attendance levels plummet further from 2020 levels as COVID variants affected their regions.

In contrast, Atlantis Aquaventure Sanya actually saw an attendance benefit from COVID. With Chinese nationals unable to leave the country, many of China's wealthy traveled to Hainan Island for recreation and duty-free luxury shopping. However, renewed lockdown restrictions in China during 2022 will impact this trend going forward.

In Korea, water park attendance was mixed with some showing a rebound in visitation and others a decline.

Somewhat of an outlier, Malaysia water parks saw guests returning in larger groups. Unlike elsewhere in the region, groups of 10-20 people began using the parks for family reunions, further increasing demand for the reopened water park market.

Interestingly, how water parks are utilized in the region may be shifting as well. Throughout Asia water parks are often used for couple outings: a dating excursion rather than a family getaway. Water parks are responding to this, creating evening events that feature shows and live music guests can enjoy while relaxing in the water. During the hot summer months, it is not uncommon for peak attendance to be at 6pm in the evening. Expanding offerings into the evenings with separate tickets boosts attendance and revenue.



Popular indoor waterparks had to end the 2021 season early in respond to COVID restrictions.

© Poseidon Beach Water World, Harbin China

Regional Waterpark

Pipeline

Waterparks remain popular for development in Asia given their smaller land area and lower investment costs. Many pipeline projects have been delayed and are awaiting improved economic conditions to move forward. Nonetheless, trends indicate a fast recovery of this market.

11.9m

Top 20 water parks in Asia-Pacific attendance 2021

21.6m

Top 20 water parks in Asia-Pacific attendance 2019





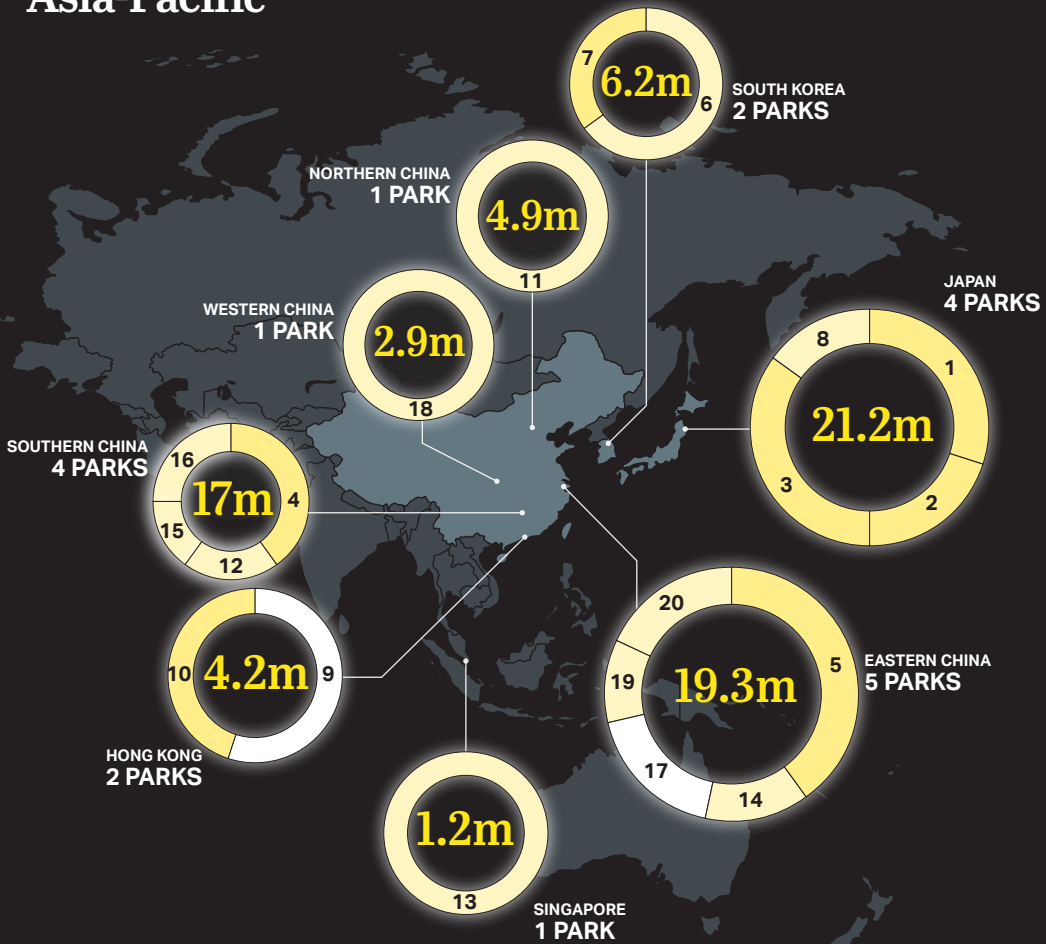
AQUAVENTURE

ATLANTIS
亚特兰蒂斯水世界



Elaborate night-time performance at Aquaventure Atlantis,
Sanya, Hainan
© Aquaventure Atlantis

Top 20 Amusement/Theme Parks Asia-Pacific



2021 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0%
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE (2020-2021)	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	51%	6,300,000	4,160,000	17,910,000
2	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	71%	5,800,000	3,400,000	14,650,000
3	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	12%	5,500,000	4,901,000	14,500,000
4	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	55%	7,452,000	4,797,000	11,736,000
5	SHANGHAI DISNEYLAND AT SHANGHAI DISNEY RESORT, SHANGHAI, CHINA	54%	8,480,000	5,500,000	11,210,000
6	EVERLAND, SEOUL, SOUTH KOREA	34%	3,710,000	2,760,000	6,606,000
7	LOTTE WORLD, SEOUL, SOUTH KOREA	58%	2,460,000	1,560,000	5,953,000
8	NAGASHIMA SPA LAND, KUWANA, JAPAN	50%	3,600,000	2,400,000	5,950,000
9	OCEAN PARK, HONG KONG SAR	-36%	1,400,000	2,200,000	5,700,000
10	HONG KONG DISNEYLAND, HONG KONG SAR	65%	2,800,000	1,700,000	5,695,000
11	OCT HAPPY VALLEY, BEIJING, CHINA	25%	4,930,000	3,950,000	5,160,000
12	CHIMELONG PARADISE, GUANGZHOU, CHINA	45%	3,890,000	2,681,000	4,905,000
13	UNIVERSAL STUDIOS SINGAPORE, SINGAPORE	9%	1,200,000	1,098,000	4,500,000
14	CHINA DINOSAUR PARK, CHANGZHOU, CHINA	5%	2,500,000	2,375,000	4,434,000
15	OCT WINDOW OF THE WORLD, SHENZHEN, CHINA	27%	2,400,000	1,890,000	3,990,000
16	OCT HAPPY VALLEY, SHENZHEN, CHINA	6%	3,310,000	3,120,000	3,980,000
17	ZHENGZHOU FANTAWILD ADVENTURE, ZHENGZHOU, CHINA	-20%	2,752,000	3,421,000	3,840,000
18	OCT HAPPY VALLEY, CHENGDU, CHINA	12%	2,940,000	2,620,000	3,580,000
19	NINGBO FANTAWILD ORIENTAL HERITAGE, NINGBO, CHINA	2%	2,308,000	2,257,000	3,575,000
20	OCT HAPPY VALLEY, SHANGHAI, CHINA	21%	3,300,000	2,730,000	3,390,000
TOP 20 TOTAL ATTENDANCE 2021		29%	77,032,000	59,520,000	141,264,000
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					55%

© 2021 TEA / AECOM

29%

Top 20 amusement/theme parks attendance change Asia-Pacific 2020-21

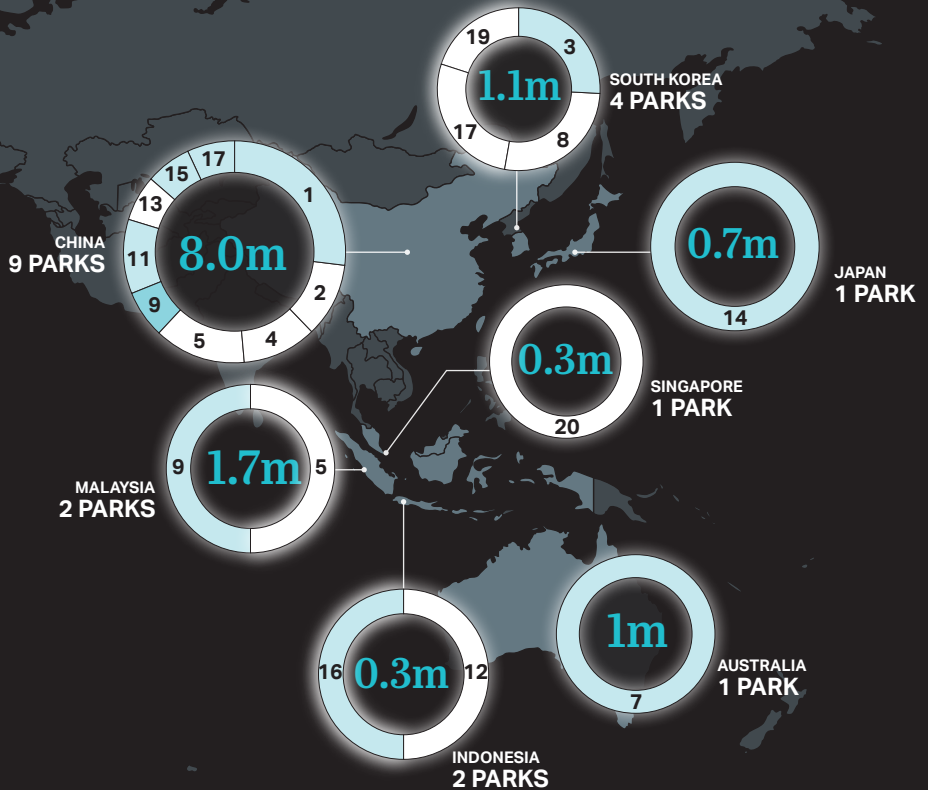
77.0m

Top 20 amusement/theme parks Asia-Pacific attendance 2021

59.5m

Top 20 amusement/theme parks Asia-Pacific attendance 2020

Top 20 Water Parks Asia-Pacific



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0 %
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE (2020-2021)	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	47%	2,230,000	1,512,000	3,014,000
2	WUHU FANTAWILD WATER PARK, WUHU, CHINA	-44%	431,000	770,800	1,348,000
3	CARIBBEAN BAY, SEOUL, SOUTH KOREA	32%	222,000	168,000	1,333,000
4	PLAYA MAYA WATER PARK, WUHAN, CHINA	-22%	730,000	930,000	1,210,000
5	AQUAVENTURE ATLANTIS, SANYA, CHINA	0%	1,200,000	1,200,000	1,200,000
	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	0%	600,000	600,000	1,200,000
7	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	2%	970,000	952,000	1,120,000
8	OCEAN WORLD, HONGCHEON, SOUTH KOREA	-36%	115,000	180,000	1,071,000
9	POSEIDON BEACH WATER WORLD, HARBIN, CHINA	94%	582,000	299,600	916,700
10	SUNWAY LOST WORLD OF TAMBUN, PERAK, MALAYSIA	0%	600,000	600,000	1,000,000
11	PLAYA MAYA WATER PARK, SHANGHAI, CHINA	26%	1,080,000	860,000	970,000
12	ATLANTIS WATER ADVENTURE, JAKARTA, INDONESIA	-82%	30,000	220,000	910,000
13	ZHENGZHOU FANTAWILD WATER PARK, ZHENGZHOU, CHINA	-29%	443,000	622,300	905,000
14	SUMMERLAND, TOKYO, JAPAN	43%	650,000	454,000	868,000
15	XIAMEN FANTAWILD WATERPARK, XIAMEN, CHINA	24%	548,000	442,000	832,000
16	THE JUNGLE WATER ADVENTURE, BOGOR, WEST JAVA, INDONESIA	34%	268,000	200,000	785,000
17	PLAYA MAYA WATER PARK, TIANJIN, CHINA	33%	730,000	550,000	750,000
	WOONGJIN PLAYDOCI WATERDOCI, BUCHEON, SOUTH KOREA	-36%	93,000	146,000	750,000
19	LOTTE WATER PARK, GIMHAE, SOUTH KOREA	-41%	78,000	132,800	740,000
20	ADVENTURE COVE WATER PARK, SINGAPORE	-10%	330,000	300,000	710,000
TOP 20 TOTAL ATTENDANCE 2021		8%	11,930,000	11,139,500	21,632,700
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					55%

© 2021 TEA / AECOM

8%

Top 20 water parks Asia-Pacific attendance change 2020–21

11.9m

Top 20 water parks Asia-Pacific attendance 2021

11.1m

Top 20 water parks Asia-Pacific attendance 2020

EMEA

The roots of recovery

The seasonal nature of most European attractions allowed many EMEA parks to enjoy nearly a full season of operation in 2021. Most closure restrictions were lifted in Q2, meaning many operators experienced only a slight delay in opening their gates for the busy summer season.

With Omicron not causing trouble until the end of the year when most parks were closed, timing was ideal for attractions in the region. Travel restrictions still had an impact on park operations, so larger destination resorts, mostly on the European continent, struggled to attract a steady stream of tourists. Domestic parks and resorts, notably Merlin's UK portfolio, recovered quickly - some even registering higher revenues than in 2019.



Jodie Lock

Associate Director – Economics,
EMEA



Successful rollouts of the COVID vaccine, starting in the UK and continuing throughout Europe, the Middle East and Africa, helped facilitate the easing of restrictions. Dubai, in particular, remained relatively open throughout the pandemic, providing an attractive escape for northern European sunseekers and resulting in a 32% increase in tourism to the UAE. The opening of Expo 2020 Dubai on October 1, 2021 (delayed one year due to COVID) provided additional incentive to travel to the region.

Inbound tourism from Asia is expected to be low throughout most of 2022 and perhaps beyond. This tends to disproportionately affect major museum and mega theme park destinations in Europe, which are more popular with long-haul tourists.

Many reinvestment projects, put on hold during 2020, resumed in 2021. New attractions, hotels and parks opened throughout the region and construction continued on those slated for 2022 and beyond. The new additions provided another compelling lure for guests returning to the parks as restrictions relaxed.

36.1m

Top 20 theme parks in EMEA attendance 2021

64.5m

Top 20 theme parks in EMEA attendance 2019





United Kingdom

UK attractions (including theme parks, water parks and museums) were closed for an average of 99 days during 2021. This was an improvement over 2020, and the pent-up demand helped compensate for some of the lost days. The government lowered VAT rates through October last year, further stimulating leisure spending.

The UK's parks are largely domestic focused, located away from major airports and tourist hubs. Most were able to open in April; waterparks opened in May – both a significant improvement over 2020's delayed July openings and ahead of many facilities elsewhere in Europe. This allowed some parks to register a 100% growth rate over 2020 and pull within 15% of 2019 figures.

Brexit was finalized in 2021. Direct impacts on the attractions industry are still being sorted, though it does seem likely that the UK's vaccine rollout ahead of the EU resulted in their parks opening earlier in the season. Labor shortages have become a problem, though, as many young European workers who typically staffed parks in the summer now need a sponsor to work in the UK.

Continental Europe

Throughout the rest of Europe, the situation showed improvement over 2020, though some places had better results than others. 50% capacity restrictions in Germany were restrictive, causing setbacks for facilities like Europa-Park and Heide Park. LEGOLAND Deutschland attendance lagged behind other domestic-focused parks due to its reliance on

international tourism, similar to other LEGOLAND parks. Disneyland Paris was in a similar position and was further impacted by closures.

The Netherlands' Efteling had one of the highest attendance figures for the region at 3.3 million visitors, despite being only open for 31 weeks of the year. In addition to benefiting from a more local audience, the park continued its multi-year investment plan. In 2021 the park renovated the Efteling Hotel, opened the artisanal bakery Bäckerei Krümel, and unveiled a new kid's play area: Nest! The park is focusing on accessibility and sustainability as it celebrates its 70th anniversary in 2022. The Efteling Grand Hotel and a new attraction on the site of the former Spookslot Haunted House are in the works for 2024.

Liseberg in Gothenburg, Sweden reopened

“

Throughout the rest of Europe, the situation showed improvement over 2020, though some places had better results than others.

in 2021 after being closed for the entirety of 2020, and achieved roughly 50% of pre-pandemic attendance, despite strict capacity restrictions. The park opened the highly themed family dark ride Underlandet in 2021 and continues construction on their 15,000 square meter indoor waterpark and 447 room hotel, both expected to open in the next two years.



Underlandet at Liseberg, Gothenburg, Sweden
Credit: Liseberg/Quarry Fold Studio



Efteling, Kaatsheuvel in the Netherlands
Credit: Efteling / Alamy Stock Photo

Spain's PortAventura christened the extension of its Colorado Creek Hotel with an additional 141 rooms, bringing the resort total to 2,400 rooms spread across six hotels. Once restrictions were lifted mid-year the resort was able to increase attendance by an impressive 267% over 2020 and the park reported Q4 sales above 2019 levels. Gardaland Resort in Italy opened in June, at a similar time and with similar attendance to 2020. They added a second gate to the property with the first LEGO themed water park in Europe: LEGOLAND Water Park.

Award-winning Puy du Fou opened their second park in Spain in 2021. Their original park in France was up 75% over 2020. With their plans to open parks and shows in China and North America, Puy du Fou will continue to be an operator to keep an eye on.

The Middle East and Africa

The UAE's successful vaccine rollout, relative ease of access for Europeans, and Expo 2020 Dubai helped to attract 7.2 million tourists in 2021. Although pandemic conditions weren't ideal for Expo, organizers reported 24 million visitors over Expo's six-month run from October 1, 2021 to March 31, 2022. One in three visitors came from overseas. Perhaps more importantly, infrastructure, attractions, and parks built in anticipation of the world's fair remain and Dubai's position in the leisure and tourism marketplace has been undoubtedly elevated. As a result, UAE theme parks are likely to become competitive for the top lists in coming years.

The Kingdom of Saudi Arabia (KSA) continues to announce mega projects across the country, many of which focus on leisure, sports and tourism. Plans like those for Qiddiya and NEOM are specifically designed to appeal to the leisure traveler and have the potential to disrupt the marketplace, possibly affecting other destinations in the region. Which projects advance and when remains to be seen.

Parks and attractions in Africa were further isolated during the pandemic due to travel restrictions. Despite the easing of pandemic-related restrictions and resumption of some flights, tourism volumes remained very low and attractions across the continent struggled. One of South Africa's most popular tourist attractions, Gold Reef City theme park, struggled to attract customers despite implementing strict COVID-19 measures to put visitors at ease. As the global situation continues to improve, expect attendance there to return to more normal levels.

“

Infrastructure, attractions, and parks built in anticipation of the world's fair remain and Dubai's position in the leisure and tourism marketplace has been undoubtedly elevated. As a result, UAE theme parks are likely to become competitive for the top lists in coming years.





Water Parks

The region's indoor water parks saw attendance remain relatively stable to 2020, while outdoor facilities saw a stronger recovery, likely due to an ongoing preference for outdoor activities during the pandemic. Siam Park in Tenerife, Spain provides a good example. In 2020 they were closed for the majority of the year and saw very low attendance. After reopening in late May 2021, the park saw a rebound in tourism over the summer season, returning to near pre-pandemic levels by Q4.

More indoor-oriented parks, particularly Therme Erding and Lalandia, were both subject to stricter capacity limits and closure periods.

Investment in the market continued with Rulantica (Europa-Park) opening the new Svalgurok outdoor slide and play structure and Aqualand Moravia planning a new inflatable Air Park, opening in 2022.

The UAE's waterparks saw a significant boost over 2020, drawing on the relative ease of access for European tourists, fewer government restrictions, and year-round operating seasons.

“

The region's indoor water parks saw attendance remain relatively stable to 2020, while outdoor facilities saw a stronger recovery, likely due to an ongoing preference for outdoor activities during the pandemic.

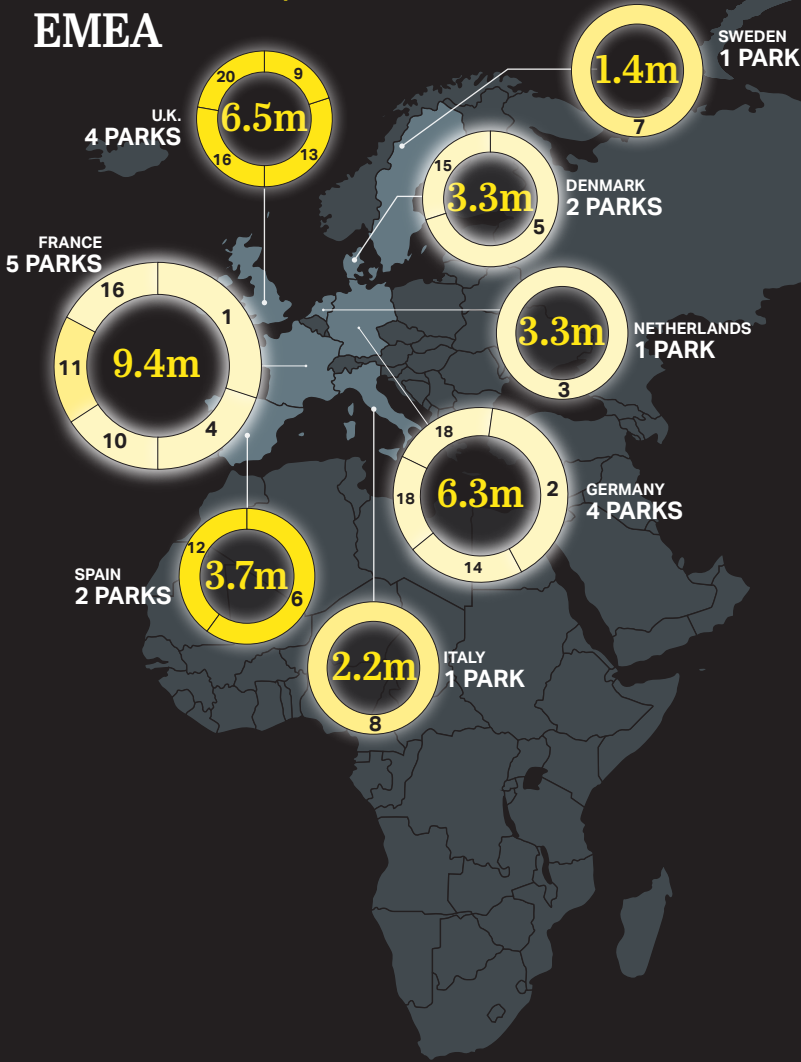
5.1m

Top 10 water parks in
EMEA attendance 2021

10.7m

Top 10 water parks in
EMEA attendance 2019

Top 20 Amusement/Theme Parks EMEA



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0%
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLÉE, FRANCE	34%	3,500,000	2,620,000	9,745,000
2	EUROPA-PARK, RUST, GERMANY	20%	3,000,000	2,500,000	5,750,000
3	EFTELING, THEME PARK RESORT, KAAATSHEUVEL, NETHERLANDS	14%	3,300,000	2,900,000	5,260,000
4	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLÉE, FRANCE	34%	1,884,000	1,410,000	5,245,000
5	TIVOLI GARDENS, COPENHAGEN, DENMARK	47%	2,400,000	1,628,000	4,581,000
6	PORTAVENTURA WORLD, SALOU, SPAIN	243%	2,400,000	700,000	3,750,000
7	LISEBERG, GOTHENBURG, SWEDEN	-	1,447,000	-	2,950,000
8	GARDALAND, CASTELNUOVO DEL GARDA, ITALY	63%	2,200,000	1,350,000	2,920,000
9	LEGOLAND WINDSOR, WINDSOR, U.K.	233%	1,500,000	450,000	2,430,000
10	PARC ASTERIX, PLAILLY, FRANCE	12%	1,300,000	1,163,000	2,326,000
11	PUY DU FOU, LES EPESES, FRANCE	75%	1,616,000	923,000	2,308,000
12	PARQUE WARNER, MADRID, SPAIN	189%	1,300,000	450,000	2,232,000
13	ALTON TOWERS, STAFFORDSHIRE, U.K.	169%	1,800,000	670,000	2,130,000
14	PHANTASIALAND, BRÜHL, GERMANY	18%	1,180,000	1,000,000	2,050,000
15	LEGOLAND BILLUND, BILLUND, DENMARK	21%	850,000	700,000	1,950,000
16	THORPE PARK, CHERTSEY, U.K.	183%	1,700,000	600,000	1,900,000
	FUTUROSCOPE, JAUNAY-CLAN, FRANCE	22%	1,100,000	900,000	1,900,000
18	LEGOLAND DEUTSCHLAND, GÜNZBURG, GERMANY	20%	900,000	750,000	1,700,000
	HEIDE PARK, SOLTAU, GERMANY	37%	1,300,000	950,000	1,700,000
20	CHESSINGTON WORLD OF ADVENTURES, CHESSINGTON, U.K.	184%	1,450,000	510,000	1,690,000
TOP 20 TOTAL ATTENDANCE 2021		63%	36,127,000	22,174,000	64,517,000
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					56%

63%

Top 20 amusement/
theme parks EMEA
attendance change
2020-21

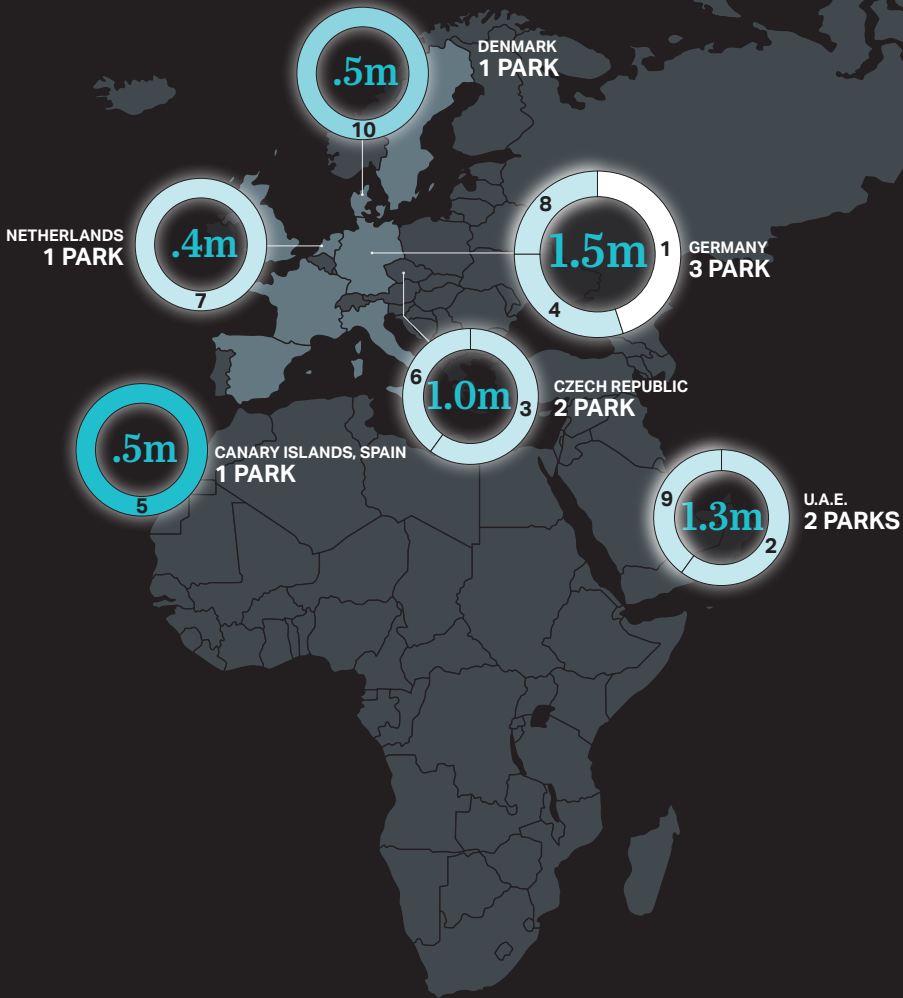
36.1m

Top 20 amusement/
theme parks EMEA
attendance 2021

22.2m

Top 20 amusement/
theme parks EMEA
attendance 2020

Top 10 Water Parks EMEA



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0 %
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	PARK LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019
1	THERME ERDING, ERDING, GERMANY	-7%	700,000	750,000	1,850,000
2	AQUAVENTURE WATER PARK, DUBAI, U.A.E.	33%	800,000	600,000	1,322,000
3	AQUAPALACE, PRAGUE, CZECH REPUBLIC	8%	580,000	537,000	1,300,000
4	TROPICAL ISLANDS, KRAUSNICK, GERMANY	1%	500,000	493,000	1,233,000
5	SIAM PARK, SANTA CRUZ DE TENERIFE, SPAIN	427%	511,000	97,000	1,200,000
6	AQUALAND MORAVIA, PASOHLÁVKY, CZECH REPUBLIC	5%	386,000	368,000	806,000
7	TIKI POOL, DUINRELL, THE NETHERLANDS	3%	400,000	390,000	800,000
8	NETTEBAD, OSNABRÜCK, GERMANY	12%	347,000	311,000	756,000
9	WILD WADI, DUBAI, U.A.E.	34%	470,000	350,000	740,000
10	LALANDIA, BILLUND, DENMARK	88%	450,000	240,000	682,000
TOP 10 TOTAL ATTENDANCE 2021		24%	5,144,000	4,136,000	10,689,000
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					48 %

© 2021 TEA / AECOM

24%

Top 10 water parks EMEA attendance change 2020–21

5.1m

Top 10 water parks EMEA attendance 2021

4.1m

Top 10 water parks EMEA attendance 2020

Museums

The museum sector in 2021 was impacted by a complex web of both supply and demand issues, and overall remained much more significantly impacted by the pandemic than the top theme parks and water parks internationally.

On the supply side, government restrictions generally eased throughout the year in most sections of the world. But as mostly year-round institutions, closures in the winter and spring of 2021 had a larger impact on museums than they did on other, more seasonal leisure offerings.

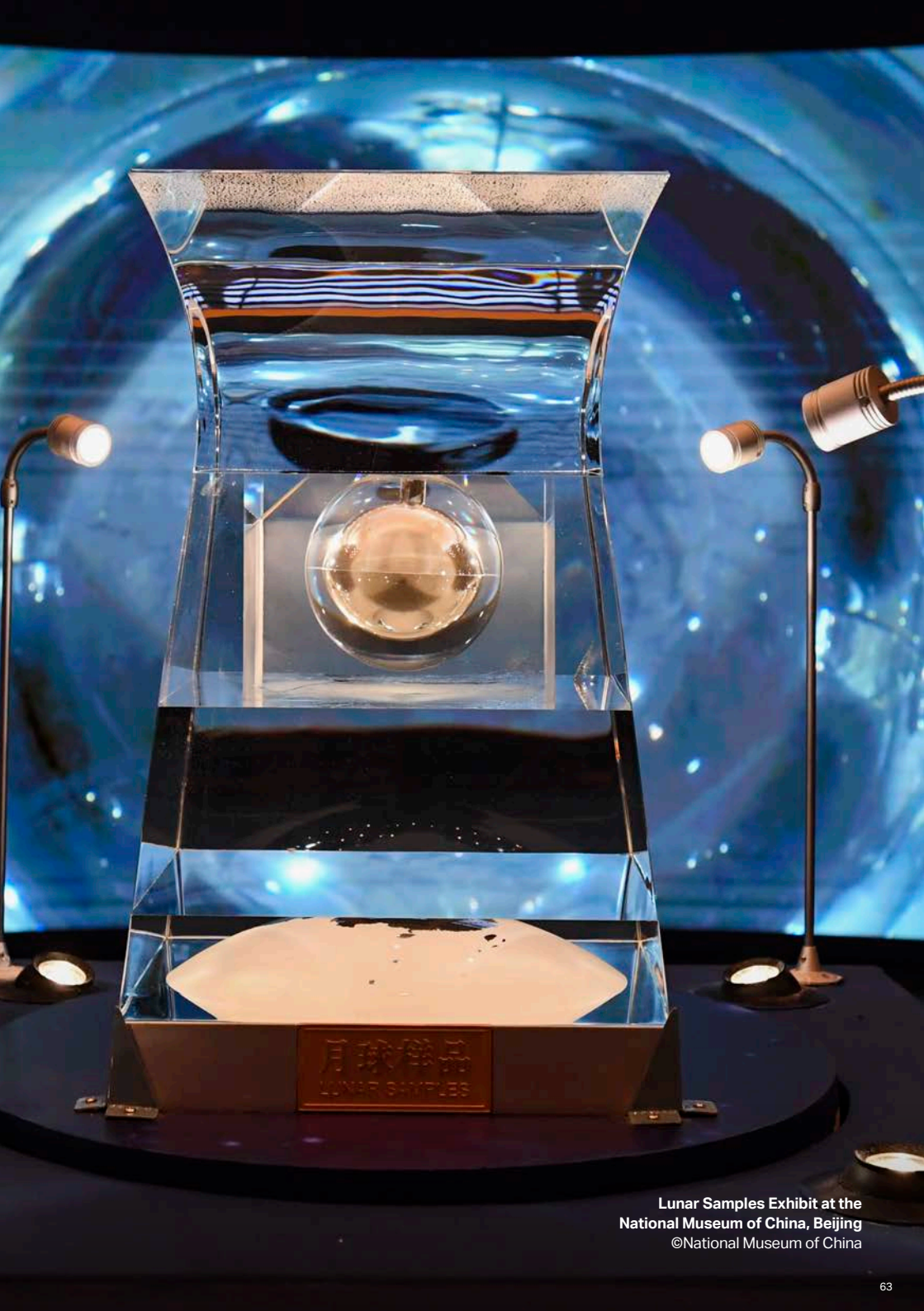
Many museums also had capacity restrictions, limiting the number of people allowed in each day. Those facilities with outdoor experiences, such as sculpture gardens, had more flexibility in allowing more visitors. Additionally, the evening “cocktail hour” style parties many museums began hosting prior to the pandemic, often attractive to younger folks during otherwise closed hours, remained unavailable to many institutions. Further contributing to capacity restrictions in 2021 were staff shortages, which led some museums to close for additional days during the week.



Linda Cheu

Vice President – Economics,
Americas





Lunar Samples Exhibit at the
National Museum of China, Beijing
©National Museum of China



Evening view of the new Humboldt Forum, Berlin, Germany
Credit: Timo Christ / Alamy Stock Photo

On the demand side, museums began to see a significant pent-up demand from visitors, with special exhibitions drawing large crowds. This led to a more typical pre-pandemic visitor mix, which usually comes from three categories: local residents, tourists and school groups. The latter two were still negatively impacted by COVID restrictions for much of 2021. Institutions that rely on international tourists in particular found it hard to make up that lost traffic, as tourism around the world last year remained at depressed levels. Facilities that primarily serve a local audience were able to more quickly recover as the local market segment is able to respond more rapidly to special exhibitions, new openings and other enticements.

Finally, in some regions there remained increased self-regulating demand on the part of visitors. Reluctant to be indoors with crowds of people, some museum guests

opted to stay home, spend their leisure time and spending on outdoor activities, or take advantage of museums' increasing digital offerings.

Museums that were able to open or re-open special exhibitions in 2021 were rewarded for their efforts with increased visitation and revenues. Overall, the impact on museum financials was significant, but mitigated by increased government assistance, more effective donor outreach, healthy endowment funds bolstered by the stock market performance, and increased per capita spending.

Downtime during the pandemic was used by some museums to engage in strategic planning and masterplanning. Notable museum openings in 2021 included the Academy Museum of Motion Pictures in Los Angeles, M+ Museum in Hong Kong, Humboldt Forum in Berlin and the opening

of the Frick Madison in the former Whitney Museum of American Art building in New York City, which will serve as its temporary location while its primary building is renovated.

Following the trends

The pandemic appears to have ushered in an era of timed ticketing that will likely continue to expand. Many museums implemented the technology as an easy way to limit capacity due to social distancing restrictions. As those restrictions have eased or disappeared, museums continue to find value in timed ticketing's benefits.

Museums continue to be on the leading edge of Diversity, Equity and Inclusion (DEI) initiatives. As museums focus on reaching underserved communities, they explore exhibits, experiences, and stories that will serve a broader audience. With more cultural attention paid to DEI, funding is



Museums continue to be on the leading edge of Diversity, Equity and Inclusion (DEI) initiatives.

As museums focus on reaching underserved communities, they explore exhibits, experiences, and stories that will serve a broader audience.



Día del Niño at Denver Museum of Nature and Science.
© Denver Museum of Nature & Science

more readily available to support these initiatives and underwrite the work and outreach needed for success.

As examples, The Queens Museum in New York engages in community partnerships focused on criminal justice and racial equity, and also hosted a food bank, COVID-19 testing and voter registration during the pandemic. The Metropolitan Museum of Art started a paid internship program that encourages students from more diverse socio-economic backgrounds to participate, thanks to a \$5 million donation.

Sustainability remains a hot topic for museums, with many science centers, zoos, and aquariums long advocating for biodiversity and environmental awareness. More museums are including sustainability pledges in their mission statements and are beginning to look at ways they can play their own role in conservation, even if it's not their main focus. The Serpentine Galleries

in London, for example, recently began examining climate and culture through a variety of conferences, film screenings, podcasts and more. The Field Museum has initiated a range of sustainability strategies, including using ionized water to clean the museum's large amounts of display glass, eliminating the need for chemical cleaners, providing sustainable, vegetarian friendly, and 5% local food offerings, and achieving a 74% waste diversion rate.

Looking ahead, museums will continue to find ways to reduce or eliminate their carbon footprint and provide a greener experience for guests. The Rijksmuseum in Amsterdam was the world's first museum to be awarded a BREAAAM-NL In-Use sustainability certificate with a rating of Outstanding (5 stars), the highest score, due to its efforts around water, energy, and waste management (BREAAAM is a worldwide sustainability assessment method).

Finally, the influence of themed entertainment and ubiquity of immersive experiences in attractions are also impacting museums. Museums are moving away from a reliance on static displays with textual interpretation and exploring opportunities to use new technologies to create environments and experiences that appeal to a broader audience and better engage visitors in mission-related themes and stories. This has bolstered DEI outreach efforts, as some communities historically were excluded by the museum glass-case model. While exhibits are redesigned, additional thought is being put into making stories and themes more inclusive.



No rankings for 2021

Because of the wide disparity in operating restrictions imposed on museums during the pandemic in different geographies and the tremendous toll the pandemic has



“

More museums are including sustainability pledges in their mission statements and are beginning to look at ways they can play their own role in conservation, even if it's not their main focus.

taken on the museum industry, we did not re-rank our 2019 list for 2021. Similar to our approach last year, we are taking the list from 2019 and updating with new figures, showing percentage changes from 2020 as well as the percentage of 2019 attendance as museums work their way back to pre-pandemic levels. We anticipate resuming attendance-based ranking in next year's report.

United States

Museums in the United States as a whole were up 95% from 2020, though still only at 37% of 2019 attendance levels. The museum epicenter of Washington, DC, was hit the hardest, relying extensively on school groups and tourism traffic to drive attendance. Smithsonian museums utilized a timed ticketing system until July of 2021 (the National Museum of African American History and Culture always had and continues to utilize timed

ticketing), restricting capacity, though likely providing a more accurate count of actual visitors to these free museums. The National Air & Space Museum's continued construction also limited their attendance. As the Omicron variant took over at the end of 2021, the Smithsonian Institution temporarily closed museums, including the National Museum of Natural History, due to a shortage of visitor service staff. Attendance at the Smithsonian museums in 2021 ranged from 13 to 23 percent of 2019 attendance, the lowest among their peers on the top 20 North American museums list.

The one notable exception in Washington, D.C. was the National Gallery of Art. Likely it was the museum's outdoor sculpture garden which opened in February (compared to most museum openings that happened in May) and ability to accommodate people

with an outdoor experience perceived by visitors to be safer that contributed to its relative success.

Museums in the population centers of California, Chicago and New York generally performed better than those in Washington, D.C., reaching between 30% and 60% of 2019 numbers. Many featured popular special exhibits upon opening. The California Academy of Sciences was ready for their reopening with five brand new exhibits in 2021 and 2022, including Sharks, Bugs, and a new outdoor interactive exhibit called Wander Woods. The Museum of Science and Industry in Chicago hosted the Marvel: Universe of Super Heroes exhibition. In New York, upon reopening, the American Museum of Natural History continued its T.Rex: The Ultimate Predator exhibit and The Nature of Color, and a recreated Creatures of Light exhibition.



Museum of Science and Industry, Chicago
MARVEL / Heidi Peters
© 2022 MARVEL



Rembrandt's Night Watch, with missing parts temporarily restored aided by artificial intelligence, Rijksmuseum, Amsterdam

Credit: REUTERS / Alamy Stock Photo
Photographer: Piroshka van de Wouw

EMEA

Museums in EMEA include some of the largest, oldest, most iconic and encyclopedic cultural venues in the world, typically accounting for 45% of attendance among the top museums globally. Due to their global and iconic stature, EMEA cultural institutions draw a significant share of visitors from international tourists, and therefore were disproportionately impacted by the pandemic.

Between 2019 and 2020, EMEA museum attendance dropped 76%, similar to Asia Pacific and North America. However, between 2020 and 2021, museum attendance only increased by 16% at the top museums, compared to 41% for Asia and 95% in North America. The 2021 attendance at the top museums in EMEA was 28% of 2019 numbers.



Due to their global and iconic stature, EMEA cultural institutions draw a significant share of visitors from international tourists, and therefore were disproportionately impacted by the pandemic.



Visitors return to the Louvre Museum in Paris to see the Mona Lisa
Andrea Izzotti / Alamy Stock Photo

Museums were open for more days in 2021 than in 2020, though results were varied, depending on the country and the particular demographic of each museum. Most institutions in Europe began to open around May 2021. Similar to other markets, facilities that relied on international tourism fared much worse than others. The Louvre, for example, saw a substantial increase over 2020 numbers with 2.8 million additional visitors, but remained well below their 2019 figure of 9.6 million. In contrast, Russian museums did relatively well. They were closed only a handful of days compared to over 100 days elsewhere in Europe.

London's cultural venues were closed for 139 days in 2021. That, coupled with their reliance on tourism, meant lower numbers for the Victoria & Albert Museum, National Gallery and Tate Modern. A lack of blockbuster special exhibitions also further hindered the UK's recovery.

Interestingly, to cope with challenges, some museums turned to the NFT market. Others engaged more aggressively with social media. The British Museum created digital NFT versions of its masterpieces. The Museo Nacional del Prado turned to TikTok to boost its visibility, and a #museummovement event on TikTok in May provided a livestream tour of 23 facilities, including Rijksmuseum in the Netherlands and the National Gallery in Singapore. Though nothing will ever replace an actual museum visit, we expect museums will continue to enlarge their web presence to supplement and enhance their visitor experience for years to come.

Asia

Most of our focus on the Asia museum space centers on China. The government continues to support expanding cultural institutions, while also pushing for free admission. China added nearly 400 museums in 2021, including the Shanghai Astronomy Museum, considered the world's largest planetarium at over 40,000 square meters. Currently, over 90% of China's museums are free to the general public.

China's approach during the pandemic has been creative. Faced with major obstacles restricting most travel in and out of the country, museums used a variety of innovative approaches to reach or attract people.

Many Chinese museums set up online presences with social media platform Bili Bili in attempts to reach younger audiences. Henan TV produced a dance show called "The Night Banquet in Tang Dynasty Palace" in an immersive theater setting with digital projection technology. The program featured

14 dancers mimicking colorful ceramic figurines from a famous painting at the Henan Museum.

In Shanghai, residents were able to visit life-size recreations of 29 well-known works from Spain's Prado Museum, presented as a pop-up exhibit in a Shanghai Metro station. Another creative approach museums use to connect with younger audiences is to hire vendors to develop murder mystery games based on the museum's collection.

“

China added nearly 400 museums in 2021, including the Shanghai Astronomy Museum, considered the world's largest planetarium at over 40,000 square meters.



Visitors role play while solving the mystery and learning about the works of art. Events typically last up to two hours and are a source of additional revenue.

On the retail front, Chinese museums continue to develop unique food items, gifts and souvenirs themed to their collections. In 2021, popular examples included artwork character popsicles from the National Museum of China, and chocolate masks with gold leaves by Sanxingdui Museum in Sichuan province.

In Hong Kong, the M+ (a “museum and more”) opened in 2021 as a contemporary visual culture museum in the West Kowloon Cultural District. The long-awaited Hong Kong Palace Museum, featuring artifacts from Beijing’s Palace Museum, opened in July 2022.

Looking ahead

Museums will need to continue to evolve to remain relevant and appeal to younger audiences. In 2020 the world moved to web conferences and an online presence. Now institutions are turning to social media and other platforms to appeal to new visitors. Inevitably the next social media tool is just around the corner.

The emergence of pop-up experiences featuring IP like Stranger Things, Alice in Wonderland, Monopoly and others will likely compete with more traditional museums for leisure time and spending. Such pop-up experiences function much like traveling exhibits and are popular in Western Europe and the US. Standalone facilities like Meow Wolf, Illuminarium, the new Perception experience coming to Las Vegas, and touring immersive art shows (such as the many Van Gogh experiences) also are likely to impact museums.



Academy Museum of Motion Pictures, Exterior. Photo by Josh White. JWPictures/@Academy Museum Foundation

Museums are innovating at an accelerated pace, incorporating new technologies to tell stories and inspire visitors around their mission, integrating IP and brand partnerships to engage more visitors and new audiences, experimenting with pop-up and shorter-term visitor experiences, and finding new ways to use food and beverage to bolster exhibit and programming themes. Many museums have used time during the pandemic to plan for future investments.

As we look ahead to 2022, attendance appears to be rebounding at an accelerated rate, with increased per capita spending. While museum pandemic recovery lagged behind the theme and water park industries, we would expect that next year's numbers will be substantially improved. In the meantime, there have been new museums that have been opened during the pandemic that will likely compete for a spot in the 2022 Museum Index.

“

Museums are innovating at an accelerated pace, incorporating new technologies to tell stories and inspire visitors around their mission.



Top 20 Museums Worldwide

2019 RANK	MUSEUM LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019 FREE/PAID
1	LOUVRE, PARIS, FRANCE	5%	2,825,000	2,700,000	9,600,000 (P)
2	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	49%	2,378,000	1,600,000	7,390,000 (F)
3	VATICAN MUSEUMS, VATICAN, VATICAN CITY	24%	1,613,000	1,300,000	6,883,000 (P)
4	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	74%	1,958,000	1,125,000	6,770,000 (P)
5	BRITISH MUSEUM, LONDON, U.K.	4%	1,327,000	1,275,000	6,208,000 (F)
6	TATE MODERN, LONDON, U.K.	-19%	1,156,000	1,433,000	6,098,000 (F)
7	NATIONAL GALLERY, LONDON, U.K.	-41%	709,000	1,197,000	6,011,000 (F)
8	NATURAL HISTORY MUSEUM, LONDON, U.K.	31%	1,564,000	1,197,000	5,424,000 (F)
9	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	n/a	n/a	n/a	5,000,000 (P)
10	STATE HERMITAGE, ST PETERSBURG, RUSSIA	70%	1,649,000	969,000	4,957,000 (P)

2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

2019 RANK	MUSEUM LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019 FREE/PAID
11	SHANGHAI SCIENCE AND TECHNOLOGY MUSEUM, SHANGHAI, CHINA	75%	2,368,000	1,351,000	4,824,000 (P)
12	REINA SOFÍA, MADRID, SPAIN	32%	1,643,000	1,248,000	4,426,000 (F)
13	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, D.C., U.S.	71%	982,000	573,000	4,200,000 (F)
14	NANJING MUSEUM, NANJING, CHINA	34%	2,034,000	1,515,000	4,169,000 (F)
15	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-16%	929,000	1,108,000	4,150,000 (F)
16	NATIONAL GALLERY OF ART, WASHINGTON, D.C., U.S.	134%	1,705,000	730,000	4,074,000 (F)
17	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	-2%	858,000	872,000	3,921,000 (P)
18	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	242%	2,360,000	690,000	3,891,000 (P)
19	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	-35%	417,000	643,000	3,832,000 (P)
20	MUSÉE D'ORSAY, PARIS, FRANCE	20%	1,044,000	867,000	3,652,000 (F)
TOP 20 TOTAL ATTENDANCE 2021		32%	29,519,000	22,393,000	105,480,000
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					29%

© 2021 TEA / AECOM

32%

Top 20 museums worldwide attendance change 2020–21

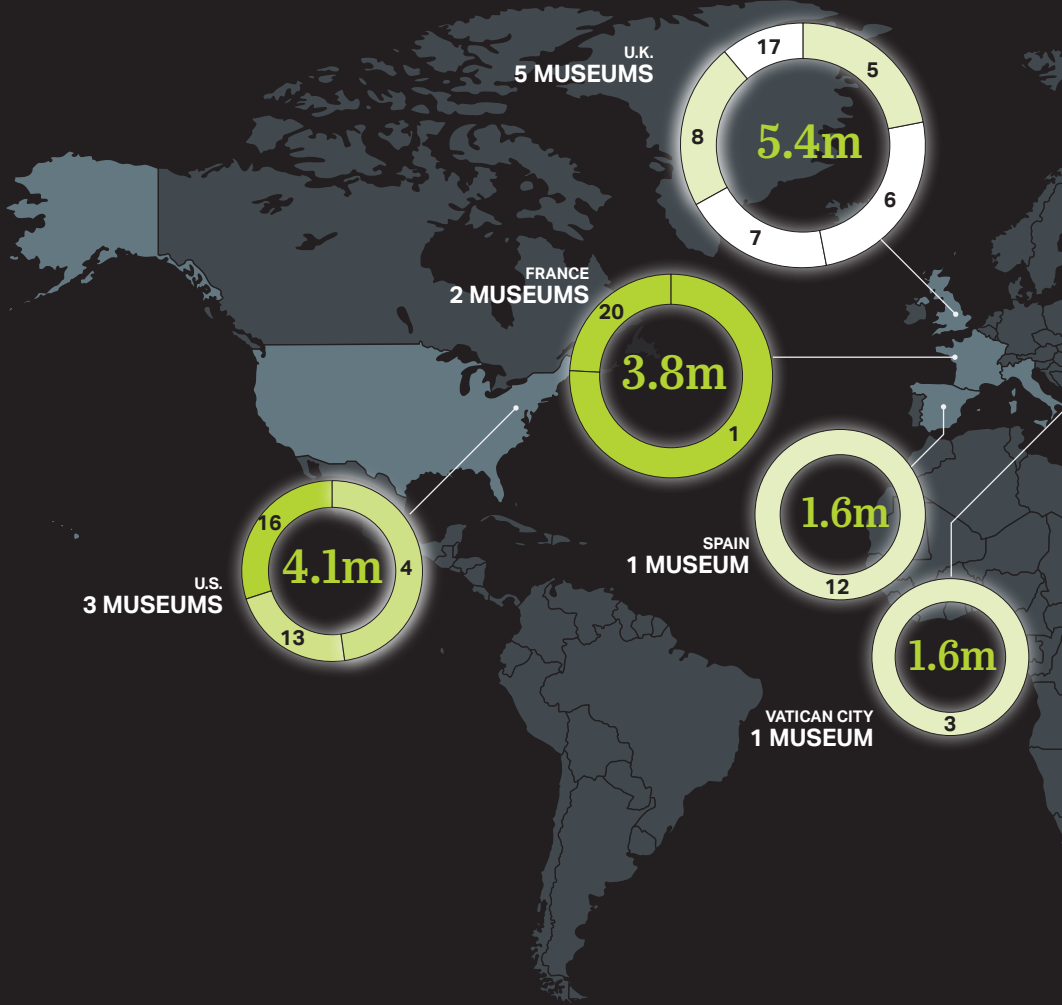
29.5m

Top 20 museums worldwide attendance 2021

22.4m

Top 20 museums worldwide attendance 2020

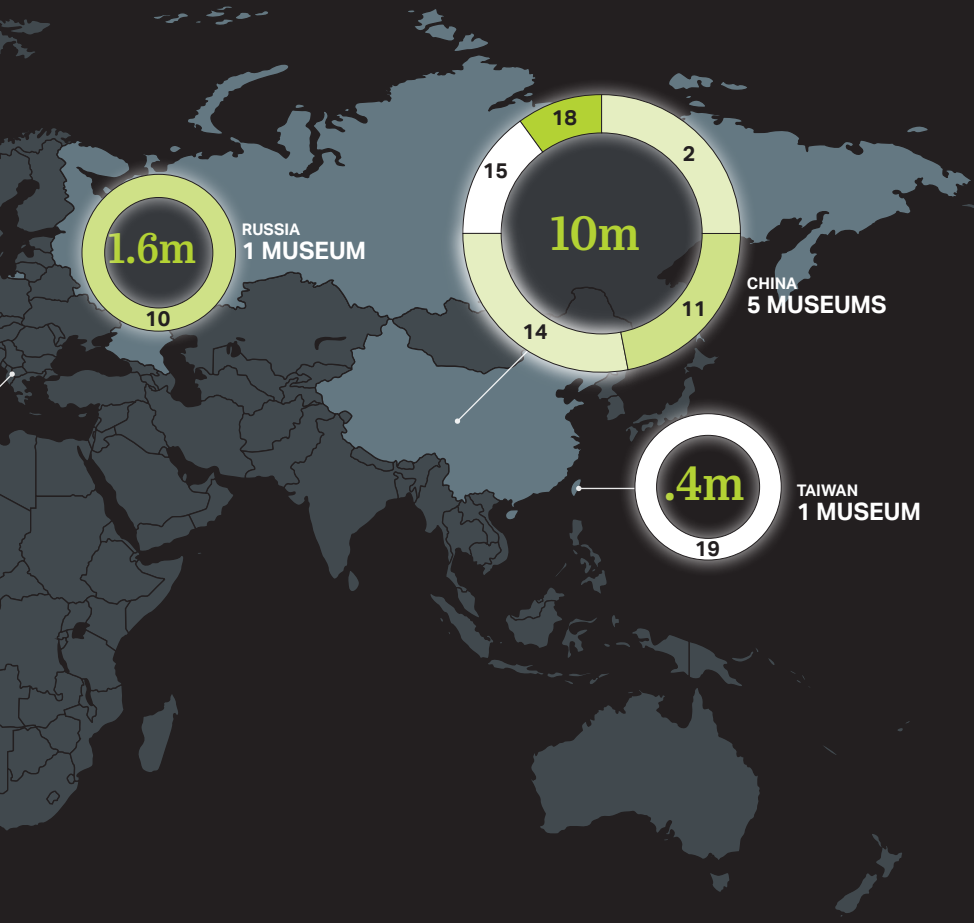
Top 20 Museums Worldwide



Key

- < 0%
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.



32%

Top 20 museums worldwide attendance change 2020–2021

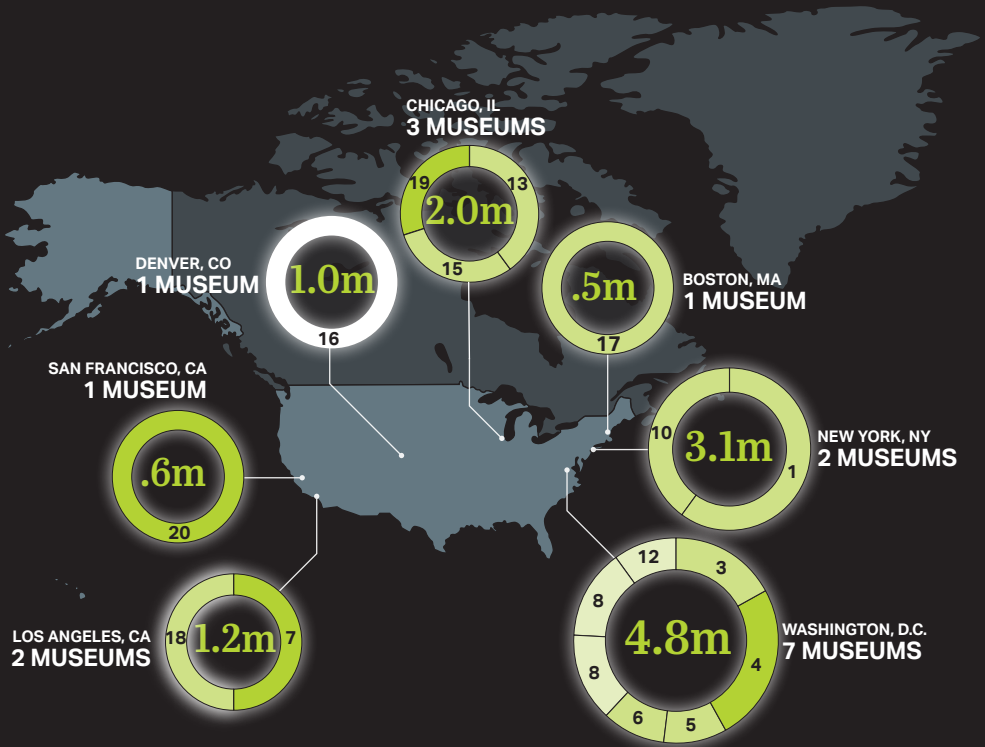
29.5m

Top 20 museums worldwide attendance 2021

22.4m

Top 20 museums worldwide attendance 2020

Top 20 Museums North America



2021 attendance trends were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0%
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	MUSEUM LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019	FREE/PAID
1	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	74%	1,958,000	1,125,000	6,770,000	P
2	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	n/a	n/a	n/a	5,000,000	P
3	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC, U.S.	71%	982,000	573,000	4,200,000	F
4	NATIONAL GALLERY OF ART, WASHINGTON, DC, U.S.	134%	1,705,000	730,000	4,074,000	F
5	NATIONAL AIR AND SPACE MUSEUM, WASHINGTON, DC, U.S.	54%	411,000	267,000	3,200,000	F
6	NATIONAL MUSEUM OF AMERICAN HISTORY, WASHINGTON, DC, U.S.	83%	570,000	311,000	2,800,000	F
7	CALIFORNIA SCIENCE CENTER, LOS ANGELES, CA, U.S.	168%	726,000	271,000	2,200,000	P
8	NATIONAL MUSEUM OF AFRICAN AMERICAN HISTORY AND CULTURE, WASHINGTON, DC, U.S.	7%	393,000	368,000	2,000,000	F
	SMITHSONIAN AMERICAN ART MUSEUM (WITH THE RENWICK GALLERY), WASHINGTON DC, U.S.	9%	420,000	387,000	2,000,000	F
10	THE MUSEUM OF MODERN ART, NEW YORK, NY, U.S.	64%	1,161,000	706,000	1,992,000	P
11	HOUSTON MUSEUM OF NATURAL SCIENCE, HOUSTON, TX, U.S.	n/a	n/a	n/a	1,974,000	F
12	NATIONAL PORTRAIT GALLERY, WASHINGTON, DC, U.S.	3%	330,000	321,000	1,700,000	F
13	THE ART INSTITUTE OF CHICAGO, CHICAGO, IL, U.S.	87%	700,000	375,000	1,666,000	P
14	U.S. HOLOCAUST MEMORIAL MUSEUM, WASHINGTON, DC, U.S.	n/a	n/a	n/a	1,600,000	P
15	FIELD MUSEUM OF NATURAL HISTORY, CHICAGO, IL, U.S.	92%	605,000	316,000	1,494,000	P
16	DENVER MUSEUM OF NATURE & SCIENCE, DENVER, CO, U.S.	-3%	959,000	991,000	1,487,000	P
17	MUSEUM OF SCIENCE, BOSTON, MA, U.S.	69%	583,000	345,000	1,458,000	P
18	THE J. PAUL GETTY CENTER, LOS ANGELES, CA, U.S.	89%	504,000	267,000	1,439,000	F
19	MUSEUM OF SCIENCE AND INDUSTRY, CHICAGO, IL, U.S.	168%	780,000	291,000	1,388,000	P
20	CALIFORNIA ACADEMY OF SCIENCES, SAN FRANCISCO, CA, U.S.	169%	646,000	240,000	1,321,000	P
TOP 20 TOTAL ATTENDANCE 2021		70%	13,433,000	7,884,000	49,763,000	
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					33%	

© 2021 TEA / AECOM

70%

Top 20 museums North America attendance change 2020–21

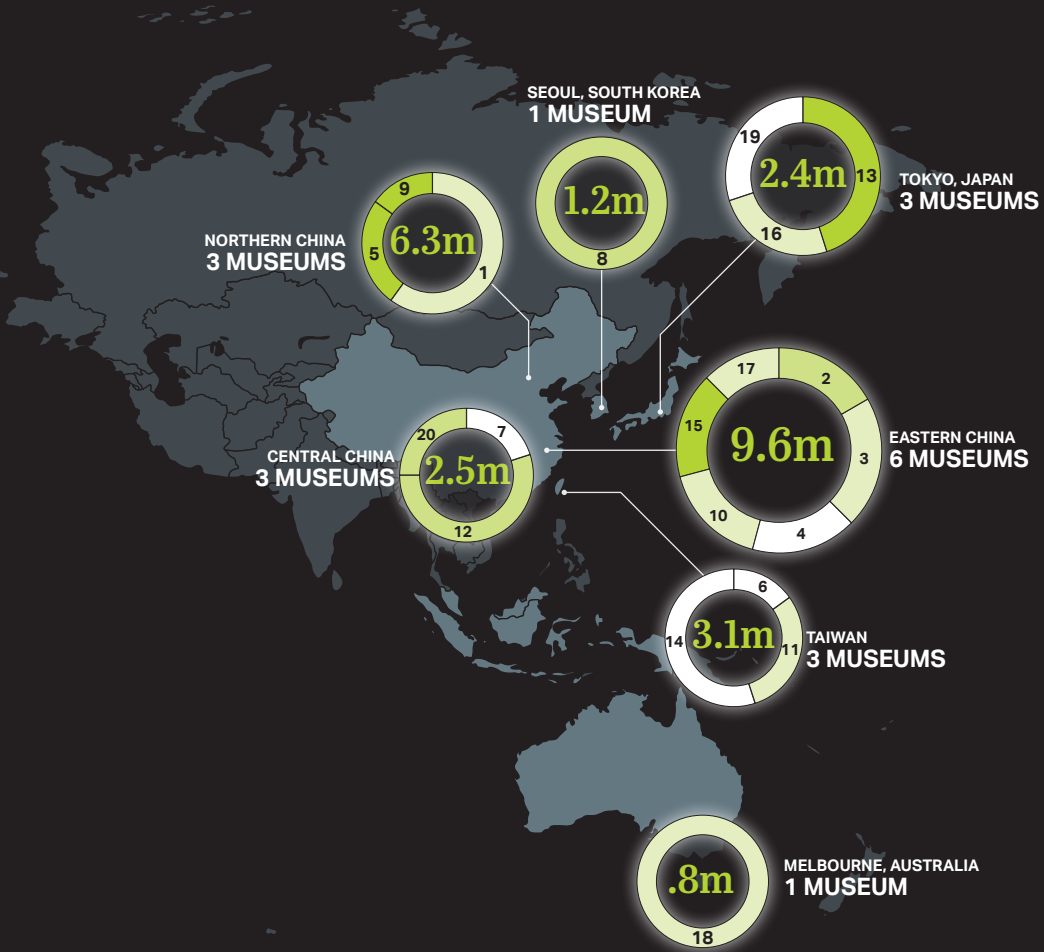
13.4m

Top 20 museums North America attendance 2021

7.9m

Top 20 museums North America attendance 2020

Top 20 Museums Asia-Pacific



2021 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0%
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	MUSEUM LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019	FREE/PAID
1	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	49%	2,378,000	1,600,000	7,390,000	F
2	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, SHANGHAI, CHINA	75%	2,368,000	1,351,000	4,824,000	P
3	NANJING MUSEUM, NANJING, CHINA	34%	2,034,000	1,515,000	4,169,000	F
4	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-16%	929,000	1,108,000	4,150,000	F
5	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	242%	2,360,000	690,000	3,891,000	P
6	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	-35%	417,000	643,000	3,832,000	P
7	XIAN MUSEUM, XIAN, CHINA	-10%	315,000	348,000	3,420,000	F
8	NATIONAL MUSEUM OF KOREA, SEOUL, SOUTH KOREA	63%	1,263,000	774,000	3,354,000	F
9	TIANJIN NATURAL HISTORY MUSEUM, TIANJIN, CHINA	191%	1,600,000	550,000	3,150,000	F
10	HUNAN MUSEUM, CHANGSHA, CHINA	26%	1,421,000	1,130,000	3,140,000	F
11	NATIONAL TAIWAN SCIENCE EDUCATION CENTER, TAIPEI, TAIWAN	7%	1,158,000	1,082,000	3,000,000	P
12	SHANXI HISTORY MUSEUM, XIAN, CHINA	51%	1,510,000	1,000,000	2,900,000	F
13	TOKYO METROPOLITAN ART MUSEUM, TOKYO, JAPAN	106%	1,049,000	510,000	2,874,000	P
14	NATIONAL MUSEUM OF NATURAL SCIENCE, TAICHUNG, TAIWAN	-31%	1,566,000	2,263,000	2,650,000	P
15	SHANGHAI NATURAL HISTORY MUSEUM, SHANGHAI, CHINA	108%	2,166,000	1,040,000	2,549,000	P
16	NATIONAL MUSEUM OF NATURE AND SCIENCE, TOKYO, JAPAN	38%	800,000	580,000	2,460,000	P
17	ZHEJIANG MUSEUM OF NATURAL HISTORY, HANGZHOU, CHINA	23%	740,000	600,000	2,443,000	P
18	NATIONAL GALLERY OF VICTORIA, MELBOURNE, AUSTRALIA	26%	802,000	637,000	2,433,000	F
19	TOKYO NATIONAL MUSEUM, TOKYO, JAPAN	-17%	605,000	725,000	2,431,000	F
20	HUBEI PROVINCIAL MUSEUM, WUHAN, CHINA	64%	730,000	446,000	2,400,000	F
TOP 20 TOTAL ATTENDANCE 2021		41%	26,211,000	18,592,000	67,460,000	
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					39%	

© 2021 TEA / AECOM

41%

Top 20 museums Asia-Pacific attendance change 2020–21

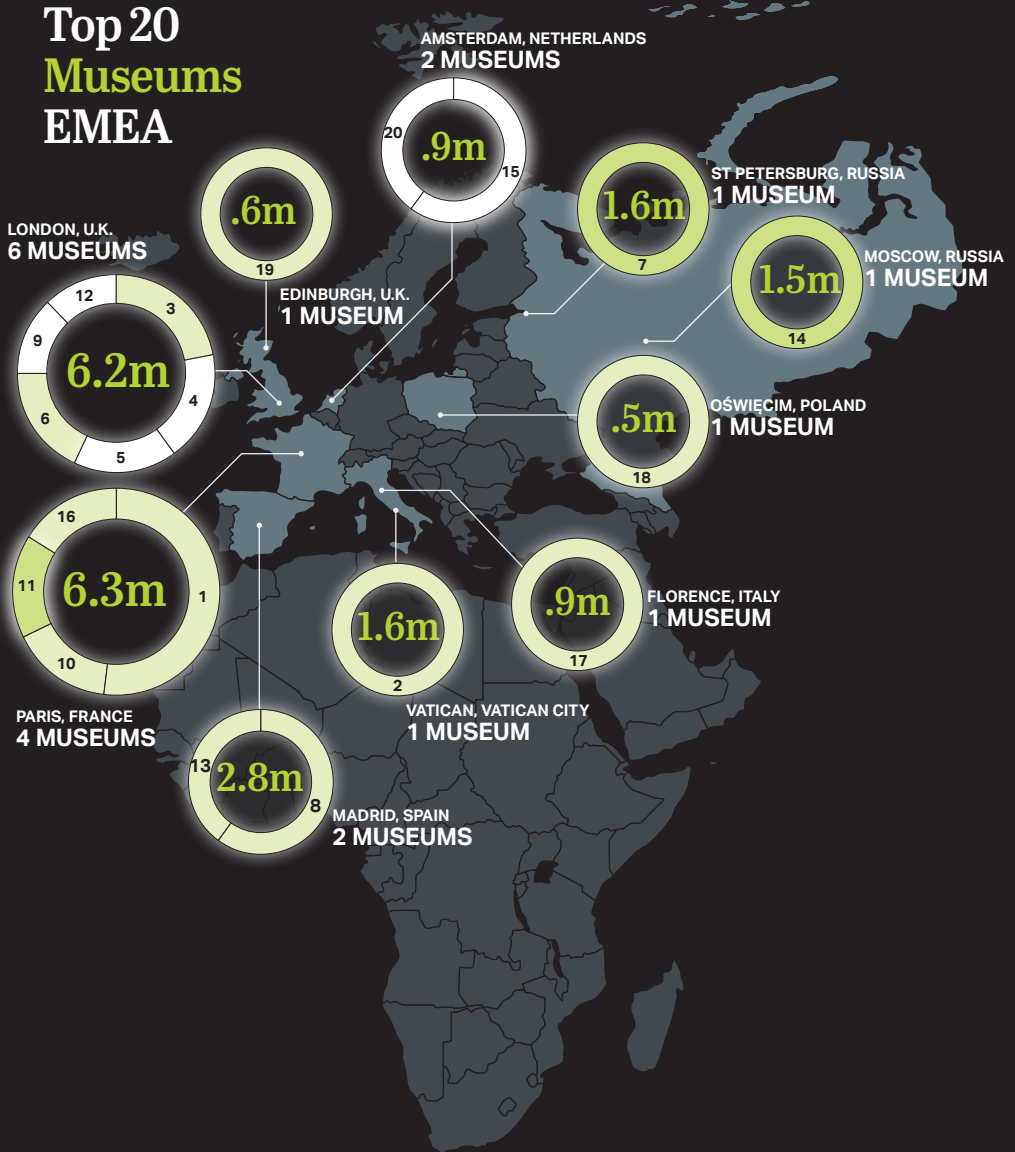
26.2m

Top 20 museums Asia-Pacific attendance 2021

18.6m

Top 20 museums Asia-Pacific attendance 2020

Top 20 Museums EMEA



2021 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2021 report.

Key

- < 0%
- 0.1% - 50%
- 51% - 100%
- > 100%
- n/a - undefined change

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 change at the ranked park versus all other ranked parks.

2019 RANK	MUSEUM LOCATION	% CHANGE 2020-2021	ATTENDANCE 2021	ATTENDANCE 2020	ATTENDANCE 2019	FREE/PAID
1	LOUVRE, PARIS, FRANCE	5%	2,825,000	2,700,000	9,600,000	P
2	VATICAN MUSEUMS, VATICAN, VATICAN CITY	24%	1,613,000	1,300,000	6,883,000	P
3	BRITISH MUSEUM, LONDON, U.K.	4%	1,327,000	1,275,000	6,208,000	F
4	TATE MODERN, LONDON, U.K.	-19%	1,156,000	1,433,000	6,098,000	F
5	NATIONAL GALLERY, LONDON, U.K.	-41%	709,000	1,197,000	6,011,000	F
6	NATURAL HISTORY MUSEUM, LONDON, U.K.	31%	1,564,000	1,197,000	5,424,000	F
7	STATE HERMITAGE, ST PETERSBURG, RUSSIA	70%	1,649,000	969,000	4,957,000	P
8	REINA SOFÍA, MADRID, SPAIN	32%	1,643,000	1,248,000	4,426,000	F
9	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	-2%	858,000	872,000	3,921,000	F
10	MUSÉE D'ORSAY, PARIS, FRANCE	21%	1,044,000	867,000	3,652,000	F
11	CENTRE POMPIDOU, PARIS, FRANCE	64%	1,501,000	913,000	3,270,000	P
12	SCIENCE MUSEUM (SOUTH KENSINGTON), LONDON, U.K.	-25%	646,000	862,000	3,254,000	P
13	MUSEO NACIONAL DEL PRADO, MADRID, SPAIN	38%	1,175,000	852,000	3,203,000	P
14	STATE TRETYAKOV GALLERY, MOSCOW, RUSSIA	77%	1,581,000	894,000	2,836,000	P
15	RIJKSMUSEUM, AMSTERDAM, THE NETHERLANDS	-7%	625,000	675,000	2,700,000	P
16	CITE DES SCIENCES ET DE L'INDUSTRIE, PARIS, FRANCE	24%	984,000	793,000	2,370,000	P
17	GALLERIA DEGLI UFFIZI, FLORENCE, ITALY	47%	970,000	659,000	2,362,000	P
18	AUSCHWITZ-BIRKENAU MUSEUM, OŚWIĘCIM, POLAND	12%	563,000	502,000	2,300,000	P
19	NATIONAL MUSEUM OF SCOTLAND, EDINBURGH, U.K.	49%	661,000	444,000	2,210,000	F
20	VAN GOGH MUSEUM, AMSTERDAM, THE NETHERLANDS	-29%	366,000	517,000	2,100,000	P
TOP 20 TOTAL ATTENDANCE 2021		16%	23,460,000	20,169,000	83,785,000	
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)					28%	

© 2021 TEA / AECOM

16%

Top 20 museums EMEA attendance change 2020-21

23.5m

Top 20 museums EMEA attendance 2021

20.2m

Top 20 museums EMEA attendance 2020

About the Study

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

This is the sixteenth 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).



John Robinett
Senior Vice President,
Economics + Advisory,
AECOM



Martin Palicki
Editor,
TEA/AECOM Theme Index

John Robinett has worked on every edition of the TEA/AECOM Theme Index since 2006 — for as long as the Themed Entertainment Association and AECOM have been collaborating to produce this annual study. He has been honored with the TEA Peter Chernack Distinguished Service Award, recognizing exceptional service to the attractions industry community.

Martin Palicki has reported on the Theme Index for many years in his publication, InPark Magazine and frequently can be seen taking photographs at TEA events. This marks his first year as editor of the Theme Index, and he is honored to follow in the footsteps of the previous editor: his colleague, mentor and friend, Judith Rubin.

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 30 to December 31, AECOM researchers 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 31, the following fiscal year numbers are used in the tables.

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 credible. 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 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:

- Given the unprecedented abnormalities experienced in 2020 and 2021 due to the COVID-19 global pandemic, to best report park attendance for the year, AECOM revised its methodology for visitor volume estimation, where necessary. Park attendance numbers were also not re-ranked for this 2021 version of the report; AECOM has reported 2020 attendance estimates for the top theme and water parks included in the 2019 version. Where park attendance was not provided by operators, AECOM conducted analysis regarding park operating days, regulatory agency operating guidelines, visitor participation trends, and local market considerations to help inform park estimates.
- Similar to theme parks, museum attendance was also primarily driven by public regulatory agency regulations affecting closures and capacity restrictions. As indoor attractions, they were often subject to much stricter regulations than theme parks. Since attendance was largely driven by these external factors, we have also not ranked museums by attendance this year, but rather, reported 2021 attendance for the top 20 museums from 2019. A few museums did not have data available, and attendance has not been estimated.
- 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, the multi-park operators and the individual parks/museums are asked to provide their attendance figures, and many of them do so directly.
- Where specific park/museum-level figures are not received from the operator, AECOM researchers 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.
- 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, the research team generally receives 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, AECOM's group also works frequently with all of the major operators, parks and museums, providing the AECOM team the opportunity to periodically compare estimates with actual exact figures. They are used to refine the methodology where necessary.
- As part of its active work in these markets and to maintain awareness of what drives performance and the macroeconomics of different countries, members of

the research group visit the parks and museums, watching for new development and trends. This helps to bring professional processes to the industry so that a higher level of quality can be transmitted from more developed markets into emerging markets. AECOM consultants frequently work for operators who are looking to enter the attractions business, or to grow or improve their existing operations. They also team with attraction master planners and designers to help correctly position and right-size parks and museums to match their market potential and optimize their financial performance. In addition, they regularly speak at industry events, such as those organized by TEA, IAAPA, WWA, AAM, AZA, ULI, and many others, about industry trends, and also contribute to articles to industry publications and in more general media publications.

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.

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 the world's trusted infrastructure consulting firm, delivering professional services throughout the project lifecycle – from planning, design and engineering to program and construction management. On projects spanning transportation, buildings, water, new energy and the environment, our public- and private-sector clients trust us to solve their most complex challenges. Our teams are driven by a common purpose to deliver a better world through our unrivaled technical expertise and innovation, a culture of equity, diversity and inclusion, and a commitment to environmental, social and governance priorities. AECOM is a *Fortune 500* firm and its Professional Services business had revenue of \$13.2 billion in fiscal year 2020.

See how we are delivering sustainable legacies for generations to come at aecom.com and [@AECOM](https://www.instagram.com/aecom).

About the Themed Entertainment Association (TEA)

The Themed Entertainment Association (TEA) is an international non-profit association representing the world's leading creators, developers, designers and producers of compelling places and experiences to share knowledge, collaborate, spark new ideas, celebrate innovation, and cultivate a diverse global membership. Our members bring the experience of engaging storytelling and entertainment to a vast number of theme parks, waterparks, museums, wildlife attractions, casinos, hotels/resorts, restaurants, retail stores, sports/performance venues, and an ever-growing list of destinations that aim to bring a higher level of visitor experiences worldwide.

Visit www.teaconnect.org.

#TEAthemeindex
[@tea_connect](https://www.instagram.com/tea_connect)

This version of the Theme and Museum Index and previous versions back to 2012 can be downloaded at the following links:

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