

THEME INDEX MUSEUM INDEX 2022



Global
Attractions
Attendance
Report

AECOM

TEA
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ENTERTAINMENT
ASSOCIATION

Cover image:

Kings Island in Mason, Ohio celebrated its 50th anniversary in 2022.

© Cedar Fair

Opposite page:

Bugs, an exhibition created by Te Papa Tongarewa Museum of New Zealand and Weta Workshop

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Credits

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THEME INDEX MUSEUM 2022 INDEX

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.



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The Big Picture

While the unpredictable nature of the Covid-19 pandemic and related restrictions punctuated the recovery of some places in 2022, the year marked a return to normal for many attraction operators around the globe, who reported annual attendance or revenues (and sometimes both) at par or even above pre-pandemic levels.

This year's report marks the last in a three-year series documenting the impact of Covid-19 on the global attractions industry. As such, we have held the 2019 rankings as constant in order to show the recovery story of parks and museums and their performance relative to 2019 all the way through to 2022.

The global attractions industry hit an attendance peak in 2019, before the pandemic forced an abrupt stop to a multi-year growth streak. Although 2020 attendance figures showed one of the steepest year-over-year attendance drops in history, the industry also began to show its resilience by working with government agencies to facilitate safe and smooth reopenings and meet the pent-up demand of local markets eager to get out of the house.

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In 2022, operators became laser-focused on improving the guest experience.

”



Francisco Refuerzo

Senior Analyst,
AECOM Economics + Advisory





Jolly Rancher Remix
© Hersheypark

As predicted in the 2020 report, 2021 was a bounce-back year for many parts of the world. But savvy attractions operators had to figure out how to best serve the new, more sophisticated consumer base that emerged from the pandemic amidst everchanging government regulations and capacity restrictions, which ultimately led to innovations in guest services and accelerated the widespread adoption of new app-based technologies. In 2022, operators became laser-focused on improving the guest experience, learning that they were able to achieve or surpass pre-pandemic revenues even with reduced attendance levels, and realizing that in an increasingly competitive entertainment landscape, high-quality and memorable guest experiences are going to drive future demand.

Local Markets

Throughout the pandemic years, local markets played a critical role in keeping attractions alive. While travel restrictions were lifted in many parts of the world, overall travel figures had not completely

recovered in 2022. This was especially true for international travel. The major theme park hub of Orlando was able to achieve huge gains in attendance mostly due to the strength of the domestic market, with many major operators noting international and group business had not fully bounced back until the end of 2022. Despite travel restrictions and capacity limitations in Japan at the beginning of 2022, Universal Studios Japan had surprisingly strong attendance, buoyed by its new Super Nintendo World and demonstrating the strength and power of a popular homegrown brand.

198.7m

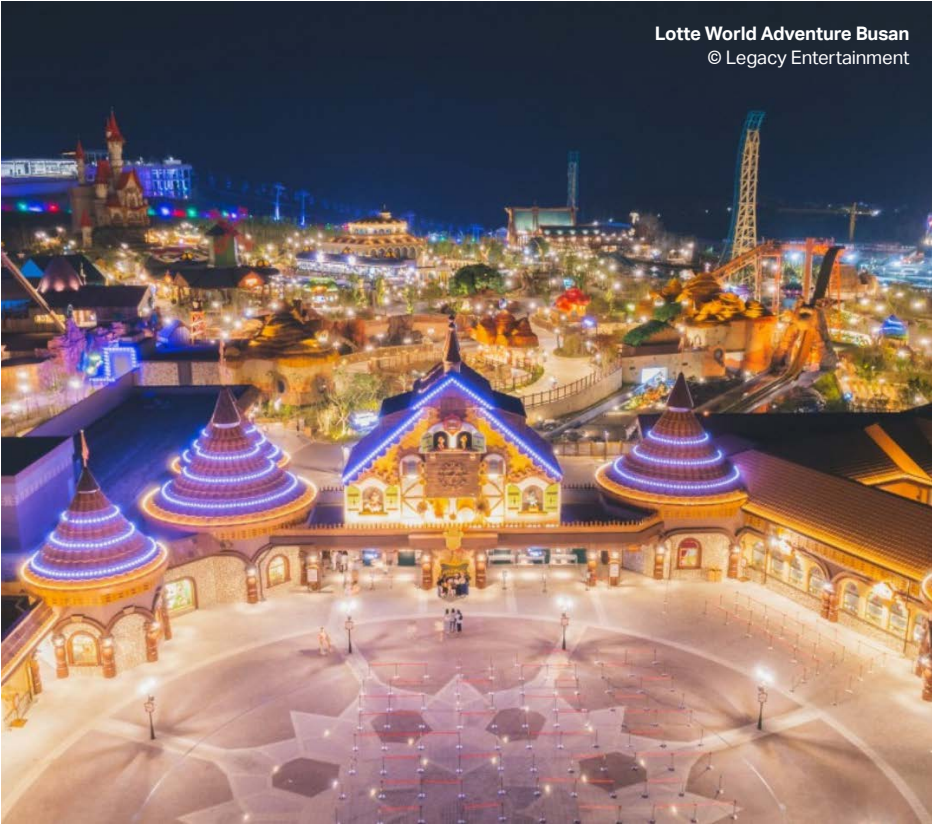
Top 25 theme parks worldwide attendance 2022

141.4m

Top 25 theme parks worldwide attendance 2021



Guests approach the Flight of the Sky Lion attraction at the LEGOLAND Windsor resort.
Photo courtesy of: LEGOLAND Windsor



Events and seasonal programming played an increasingly important role in attracting the local market, as operators created new reasons for guests to visit multiple times a year. Halloween season proved to be some of the most profitable and busiest days of the year. Operators with popular Halloween programming, such as Universal, Six Flags, and Cedar Fair are adding more capacity,

additional days, or moving to a system requiring separate tickets for such events. Many parks have offered discounted night tickets, but some parks are also getting creative with ways to capture repeat visitors. For example, Parque Xcaret in Mexico offers discounted rates that can be redeemed within a few days after your initial visit.

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Boysenberry Festival at Knott's Berry Farm in Bunea Park, California
© Cedar Fair

Sophisticated Consumer

The pandemic revealed a sophisticated consumer base that is willing to pay more for out of home entertainment and experiences. However, consumers also demand more in terms of comfort, ease, quality, and satisfaction. Overall tolerance for big crowds and long waits seems to have gone down. Operators continued to introduce strategies like dynamic pricing and ticketing products, as well as make big investments in mobile app services and improvements in the way they engage with guests. Business intelligence and data analytics were a big part of informing changes to operations and management for many parks.

In many ways operators have become more sophisticated as well, especially as they move to adopt new diversity, equity, and inclusion (DEI) and environmental, social, and governance (ESG) policies. Disney

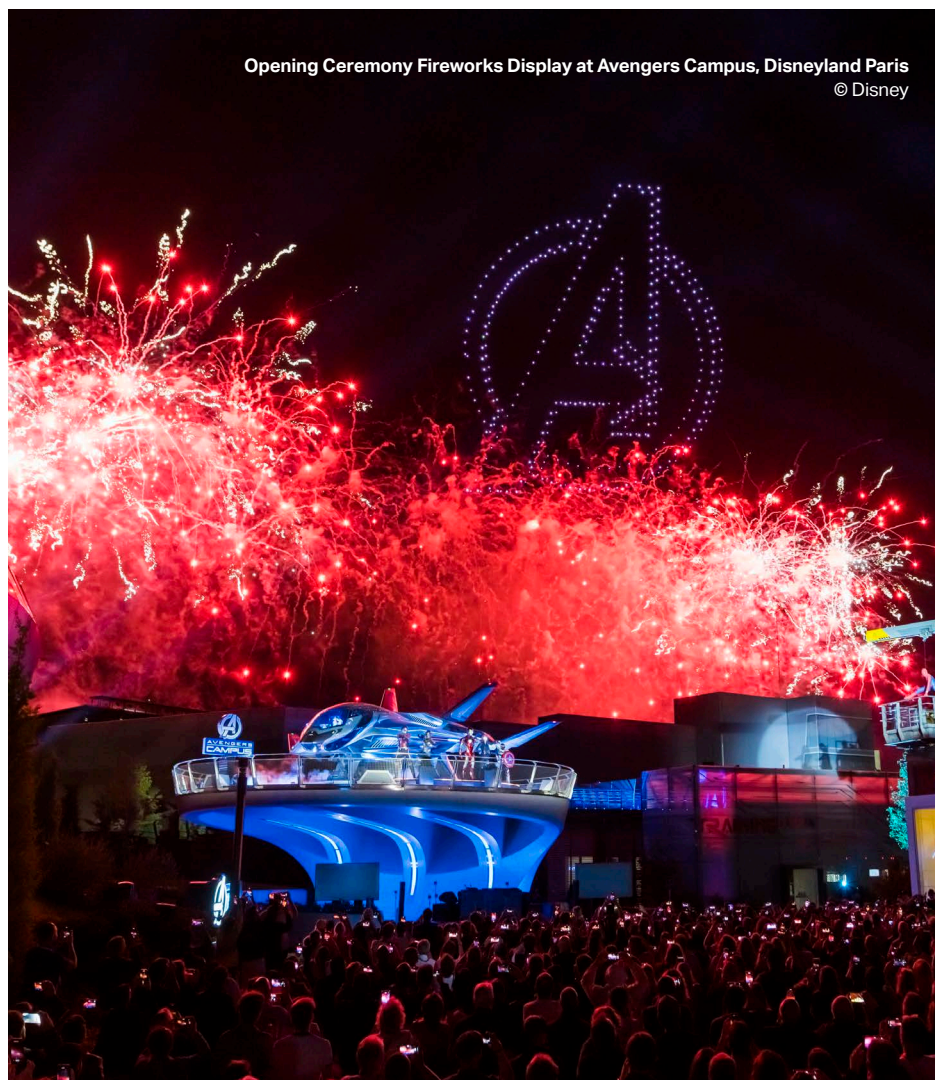
expanded its employee dress code to be more inclusive and allow cast members to express their identity. Cedar Fair embarked on an ESG strategy in 2022 and filed its first report at the start of 2023. Parks in the Europe, Middle East, and Africa region are pioneers in developing solutions and practices that address sustainability concerns. Efteling and PortAventura are leading examples on this front, reducing waste and carbon footprints, and relying on renewable energy through initiatives like the PortAventura Solar Project.

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The pandemic revealed a sophisticated consumer base that is willing to pay more for out of home entertainment and experiences.
”

Improving the Guest Experience

Lessons learned and trends emerging from the pandemic, many of them described above, have led attractions operators to center their investments and strategies

around improving the guest experience. And those improvements came in all shapes and sizes - from expansion of premium services like Disney's Genie+ that allow guests to experience more attractions to small but important improvements in food and beverage offerings such as Cedar Fair and Six Flags committing to complete overhauls of their food programs. Another strategy involving crowd control is Disney's efforts to purposefully limit capacity



Dutch theme park Efteling recently created a carport system with solar panels - a big step towards its goal to reach climate neutrality by 2030.

© Efteling



(sometimes by 20 percent) at some of its domestic and international parks during key holiday periods in order to preserve the guest experience.

Some of these improvements have the dual goal of maintaining the per capita spending and length of stay trends at parks that emerged post-pandemic. However, there has also been some resistance to the increased cost of visiting parks. In response to guest feedback, Disney announced efforts to make the parks more accessible, such as adding more of the lowest-price day tickets at Disneyland Resort in Anaheim. Similarly, in 2023 Cedar Point announced its first drop in gate ticket prices in nearly twenty years.

Around the world, parks looked for opportunities to engage with guests beyond the gate, such as developing their surrounding properties into full resort concepts by introducing themed or immersive hotels and/or new complimentary uses like retail and leisure activities. New

hotel openings included the Efteling Grand Hotel, Disney's Hotel New York- The Art of Marvel at Disneyland Paris, and the first Toy Story themed hotel at Tokyo Disney Resort. Larger resort expansions that include multiple hotel properties are underway at several resorts including PortAventura, Atlantis Dubai, Grupo Xcaret in the Riviera Maya, and Universal's Epic Universe in Orlando. The recently announced Disneyland Forward expansion plan in Anaheim is another reminder that even the oldest parks will continue to reinvent themselves and offer new experiences to keep guests coming back.

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Around the world, parks looked for opportunities to engage with guests beyond the gate.

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México Espectacular, Parque Xcaret
© Grupo Xcaret



Universal unveiled a new family-focused theme park concept slated for Texas.
© Universal Destinations & Experiences

Top 25 Amusement/Theme Parks Worldwide

2019 RANK	PARK LOCATION	% CHANGE 2021-2022	ATTENDANCE (in thousands)			
			2022	2021	2020	2019
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	35%	17,133	12,691	6,941	20,963
2	DISNEYLAND PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	97%	16,881	8,573	3,674	18,666
3	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	90%	12,000	6,300	4,160	17,910
4	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	74%	10,100	5,800	3,400	14,650
5	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	125%	12,350	5,500	4,901	14,500
6	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	25%	9,027	7,194	4,166	13,888
7	EPCOT AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	29%	10,000	7,752	4,044	12,444
8	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	-41%	4,400	7,452	4,797	11,736
9	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	27%	10,900	8,589	3,675	11,483
10	SHANGHAI DISNEYLAND AT SHANGHAI DISNEY RESORT, SHANGHAI, CHINA	-38%	5,300	8,480	5,500	11,210
11	UNIVERSAL STUDIOS FLORIDA AT UNIVERSAL ORLANDO, FL, U.S.	20%	10,750	8,987	4,096	10,922
12	UNIVERSAL'S ISLANDS OF ADVENTURE AT UNIVERSAL ORLANDO, FL, U.S.	21%	11,025	9,077	4,005	10,375

2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 report.

2019 RANK	PARK LOCATION	% CHANGE 2021-2022	ATTENDANCE (in thousands)			
			2022	2021	2020	2019
13	DISNEYCALIFORNIA ADVENTURE PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	81%	9,000	4,977	1,919	9,861
14	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	184%	9,930	3,500	2,620	9,745
15	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	53%	8,400	5,505	1,299	9,147
16	EVERLAND, GYEONGGI-DO, SOUTH KOREA	56%	5,770	3,710	2,760	6,606
17	LOTTE WORLD, SEOUL, SOUTH KOREA	84%	4,520	2,460	1,560	5,953
18	NAGASHIMA SPA LAND, KUWANA, JAPAN	17%	4,200	3,600	2,400	5,950
19	EUROPA-PARK, RUST, GERMANY	100%	6,000	3,000	2,500	5,750
20	OCEAN PARK, HONG KONG SAR	0%	1,400	1,400	2,200	5,700
21	HONG KONG DISNEYLAND, HONG KONG SAR	21%	3,400	2,800	1,700	5,695
22	DE EFTELING, EFTELING THEME PARK RESORT, KAATSHEUVEL, NETHERLANDS	65%	5,430	3,300	2,900	5,260
23	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	183%	5,340	1,884	1,410	5,245
24	OCT HAPPY VALLEY, BEIJING, CHINA	-24%	3,740	4,930	3,950	5,160
25	CHIMELONG PARADISE, GUANGZHOU, CHINA	-41%	2,300	3,890	2,681	4,905
TOP 25 TOTAL ATTENDANCE 2022		41%	198,696	141,350	83,258	253,724
TOP 25 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						78%

© 2023 TEA / AECOM

41%

Top 25 amusement/theme parks worldwide attendance change 2021-22

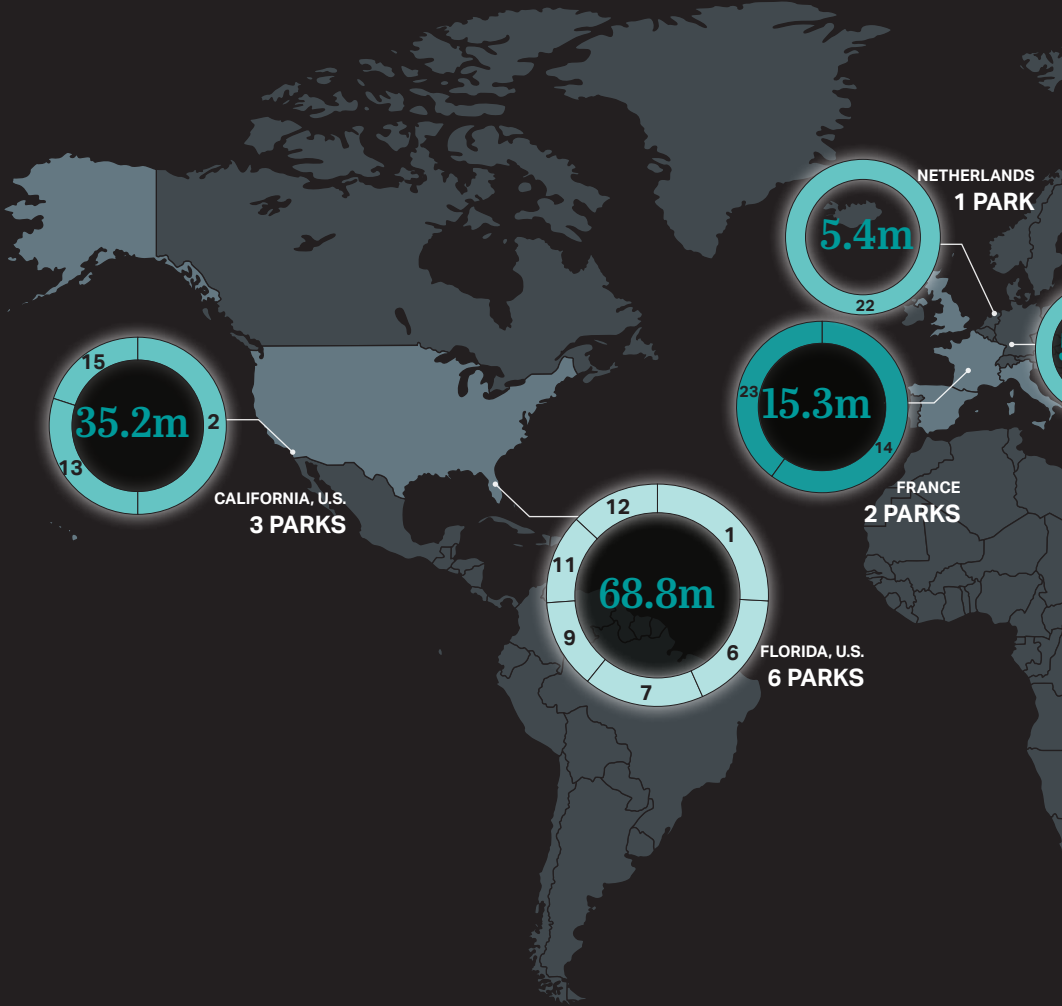
198.7m

Top 25 amusement/theme parks worldwide attendance 2022

141.4m

Top 25 amusement/theme parks worldwide attendance 2021

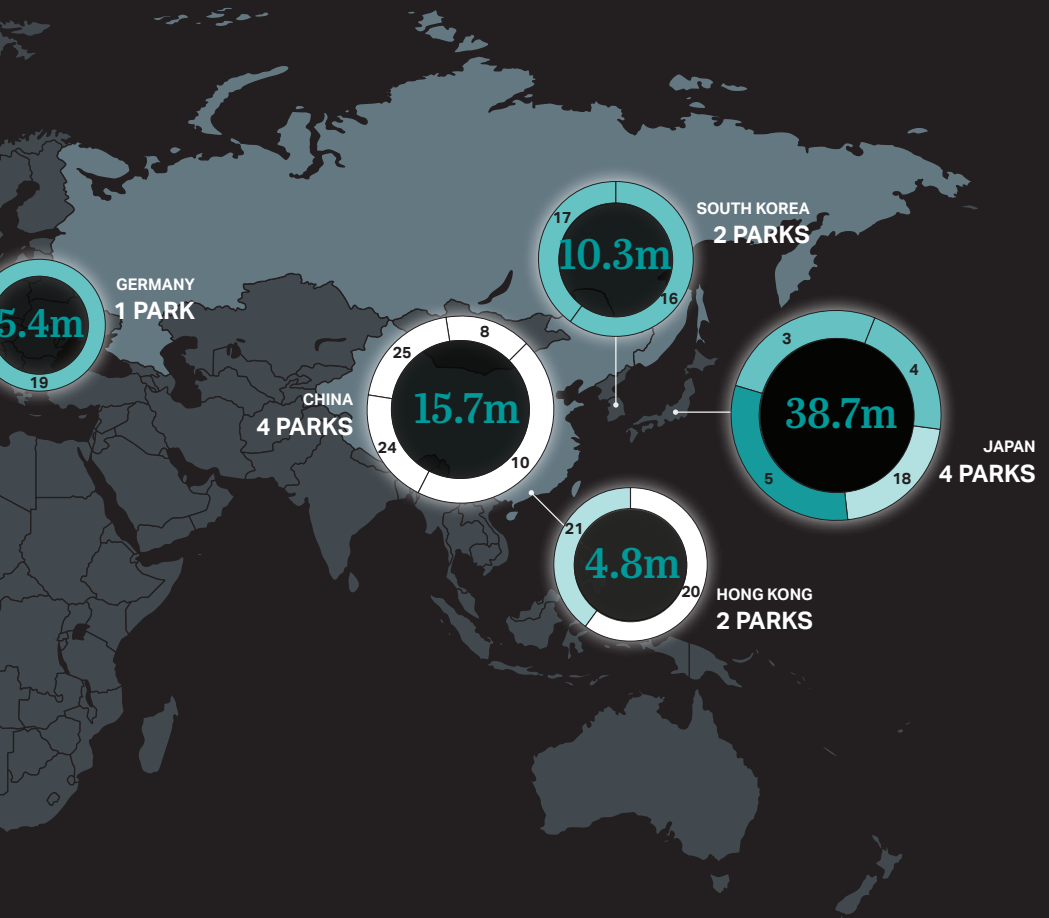
Top 25 Amusement/Theme Parks Worldwide



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

Quality over Quantity

Although general attendance trends in the Americas have returned to "pre-pandemic" levels, park operators have realized that attendance isn't everything.

In the Americas, the process of pandemic recovery continued throughout 2022. The prior year's trend of increased per capita spending has continued, and in some cases been amplified. Revenues, particularly for the major operators, are higher than pre-pandemic levels, even in instances where attendance has dropped or been controlled.

Though the region operated largely without travel restriction for the whole year, international travel to the US was down 30%. The United States dropped its inbound Covid testing requirement on June 12, 2022 – too late to really impact the lucrative summer travel season. International travel in the fourth quarter of 2022 resumed to mostly normal levels.



Francisco Refuerzo

Senior Analyst,
AECOM Economics + Advisory





This has resulted in a continued focus on creating the best guest experience. Whether through ticketing policy, new merchandise or continued investment in park attractions, being intentional about how visitors interact with (and in turn spend money with) the park and its brands has proven profitable.

Special events within the parks remain popular. Extra ticketed events, particularly around Halloween and the winter holidays, continue to drive additional attendance and revenue to the parks, adding a nice boost to bottom lines in Q3 and Q4. Operators are trying to expand that success into other quarters, such as Six Flags' haunt-themed Scream Break launched in spring of 2023.

One key trend is the continued refinement of in-park technology that completes the guest experience. The major parks have been focused on building highly themed, IP-driven lands for the past 10-15 years. Even regional chains like Cedar Fair are weaving more storytelling into

their land theming. Now the parks are more intentionally creating – and selling – technology to allow the guest to more fully interact with the land. Whether that is a wand, a wristband, or other device, guests need that technology in order to participate in the gamified elements of a land. This type of theming monetization is a trend we see continuing into the future.

“
The prior year’s trend of increased per capita spending has continued, and in some cases been amplified.
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Super Nintendo World, Universal Studios Hollywood
© Universal Destinations & Experiences

Disney

Bob Iger's return to the CEO role at Disney marked a review of the company's strategies and policies – in many cases making changes that improved the guest experience – starting with the company's ticketing policies. Disneyland increased the number of days that their lowest-priced ticket was available and resort parking fees for hotel guests were eliminated at The Walt Disney World Resort. Reducing fees in some areas allowed guests to spend more in the parks – and Disney provided plenty of opportunities to do so. Disney World's 50th anniversary, which ran throughout 2022, featured specialty retail as well as new attractions and shows. The new indoor roller coaster Guardians of the Galaxy: Cosmic Rewind was perhaps the biggest debut, driving attendance to Epcot. Disneyland showed the most dramatic increase over the previous year, as the park faced operating restrictions from the state of California throughout most of 2021.

Universal

Investment has been the name of the game at Universal. Coming on the heels of major investment in the company's Asia parks, the focus now seems to be on the USA, with Super Nintendo World opening recently in Hollywood and the new Epic Universe park rapidly continuing construction in Orlando. Universal's extremely popular Halloween Horror Nights (HHN) events in the fall continue to be a major driver of attendance for the company. As a separate ticketed event the parks essentially double their attendance for a day with day guests and night guests visiting the park. It's so popular that Universal Orlando announced early this year that HHN 2023 will take place over 44 nights, more than ever before.



Cedar Fair

Compared to other operators, Cedar Fair doesn't rely as much on its IP partnership with Peanuts to drive per capita spending. Instead, the company has raised ticket prices and invested in more and better food and beverage options. This was a multi-year program developed prior to the pandemic but accelerated during that down time. The result has been an overall increase in the number of transactions as well as an increase in the value per transaction. Cedar Fair has also invested in plussing their resort hotel offerings, specifically at the Cedar Point location.

Six Flags

The regional park chain is in the midst of a strategy overhaul, with new CEO Selim Bassoul (appointed late in 2021) working to change the parks' perception and audience. Six Flags has been lagging behind in both attendance and revenue, but Bassoul's attempt to bring in families with more money to spend (instead of the chain's primarily teenage audience) will hopefully yield big results soon. To start, Six Flags increased its ticketing prices, revamped its season pass program and eliminated its all-you-can-eat annual meal plan, although the chain has further adjusted some of those changes for the 2023 season.

New attractions opened across the park chain, perhaps most notably Wonder Woman Flight of Courage at Six Flags Magic Mountain, the park's twentieth roller coaster.

SeaWorld Parks & Entertainment

The company's strategy of holding off on new investments in the parks during the pandemic may have negatively impacted the chain in the short term, but now that new rides and attractions are starting to debut in 2022 and 2023, attendance projections are on the rise. Iron Gwazi, the highly anticipated replacement for Busch Gardens Tampa's Gwazi wooden coaster, opened in 2022 to fans' delight. The company has set a goal to get back to its chain-wide attendance record of 25 millions guests in 2008.

140.5m

Top 20 theme parks in North America attendance 2022

104.8m

Top 20 theme parks in North America attendance 2021

9.0m

Top 10 theme parks in Latin America attendance 2022

6.6m

Top 10 theme parks in Latin America attendance 2021

Smaller Parks

Lost Island Theme Park, the United States' first new theme park in years opened in 2022. Located in Waterloo, Iowa, the park is a second gate to Lost Island Water Park. It opened relatively late in the season but features an impressive array of rides, including a custom dark ride that helps tell the park's backstory.

Hersheypark rethemed an existing coaster and added a new flat ride to create a small Jolly Rancher themed area. The coaster includes a tunnel where riders experience the sweet scent of Jolly Rancher candy.

Latin America Theme Parks

Typically a quiet region when it comes to theme parks, Latin America has seen a good share of activity in the last several years. Since Covid, two of the top ten most visited theme parks in Latin America closed: La Feria De Chapultepec in Mexico City and Plaza de Sesamo in Monterey. Instead of pursuing the development of a traditional theme park, Mexico City initiated the Chapultepec site's transformation into a free admission, pay-as-you-go urban park open to the public, but capable of hosting large-scale events as well as a roller coaster and other rides.

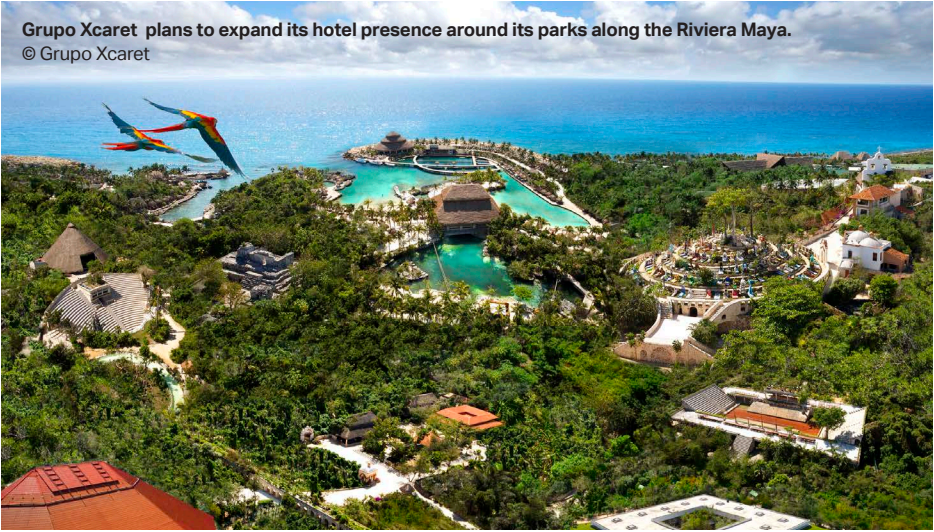
In southeast Mexico, federal and state governments have accelerated the Mayan Train construction, aiming to launch operations by December 2023. At over 900-miles long, the mega-project aims to connect the far reaches of the



Iron Gwazi replaced the Gwazi wooden coaster at Busch Gardens Tampa © SeaWorld Parks & Entertainment

Grupo Xcaret plans to expand its hotel presence around its parks along the Riviera Maya.

© Grupo Xcaret



Yucatan peninsula with stations at critical infrastructure points like airports, tourism hotspots such as Tulum and Cancun, and archaeologically-rich, and environmentally-sensitive places like Chichen Itza. The train is designed to generate economic benefits through enhancing tourism as well as improving travel logistics for both cargo and passengers. This greatly enhances the position of Grupo Xcaret, the region's dominant operator of eco-tourism parks, activities, and accompanying hotels. In recent years, Xcaret has moved swiftly into the hospitality sector, building out the land adjacent to their parks and creating their own ecosystem of products and experiences centered around local culture, heritage, and nature.

The group has expressed interest in building more hotels and parks in the region. It's most recent theme park, Xibalba, opened in 2022. The access the train will provide to their properties may have a big impact on how Xcaret approaches development in the future.

Also on the horizon is the Inka Park set to open in Peru in 2025. Located on the coast of Peru, Inka Park will be inspired by

Inka history and culture. It will include over 50 themed attractions in a natural setting, giving guests access to mysterious ruins, archaeological adventures and immersive lands. The resort will consist of a theme park, water park, botanical gardens, landscape park, golf course and multiple accommodations.

This trend of creating theme park experiences and brands around local culture, indigenous peoples and natural landscapes is popular within Latin America. In some ways, parks developed along these lines are creating their own IP that is every bit as valuable to them as titles created in Hollywood studios.

Water Parks

Water parks throughout the Americas performed similarly to theme parks. Absent of pandemic restrictions for 2022, water parks benefitted from pent-up demand and a largely good weather season. In 2021, water parks outperformed the other regions and sectors in terms of recovering pre-pandemic attendance, a trend that gave them strength leading into 2022.

Many park operators are beginning to re-evaluate the relationship between existing water parks and the rest of their operations. Perhaps the water park sector's demonstrated resilience during the pandemic, the mounting expectations around per capita spending, or a combination of the two, prompted the attention. Six Flags hopes to apply its premiumization strategy to water parks, developing new adults-only areas with food and alcohol, products such as advanced beach chair reservations, and luxuries like cabanas. Though often initially built as add-ons to theme parks, operators are now seeing potential for additional attendance and revenue from their water park investments.

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Universal saw this opportunity in 2017 when it introduced the Tapu Tapu wearable wristband system for its Volcano Bay park in Orlando. Every visitor receives a wristband upon entry, which allows them to link a form of payment, track photos of their party taken by park photographers, and engage with specific interactive elements in the park. Although the wristband does not represent a premium upsell product, Tapu Tapu exemplifies the trend mentioned above about technology that becomes the piece that completes the whole experience.

Other water park operators such as Cedar Fair, SeaWorld, and Disney continue to invest in their legacy properties as well as new water park products. Cedar Fair operates its Soak City brand of water parks, but 2022 marked the first full year of operating two Schlitterbahn water parks it purchased in 2019. SeaWorld operates several water park brands, but transformed the former Aquatica San Diego into Sesame Place, its family friendly quasi-theme-water park concept (and SeaWorld's first new park since 2013).

In 2019, Disney laid claim to the top two most visited water parks in the Americas with Typhoon Lagoon and Blizzard Beach at Walt Disney World in Orlando. However, since parks reopened with the loosening of Covid restrictions, Disney has mostly operated only one park at a time. Typhoon Lagoon was open for almost all of 2022 after being closed for all of 2021.



12.6m

Top 20 water parks in
North America attendance 2022

10.7m

Top 20 water parks in
North America attendance 2021

10.1m

Top 10 water parks in
Latin America attendance 2022

7.0m

Top 10 water parks in
Latin America attendance 2021

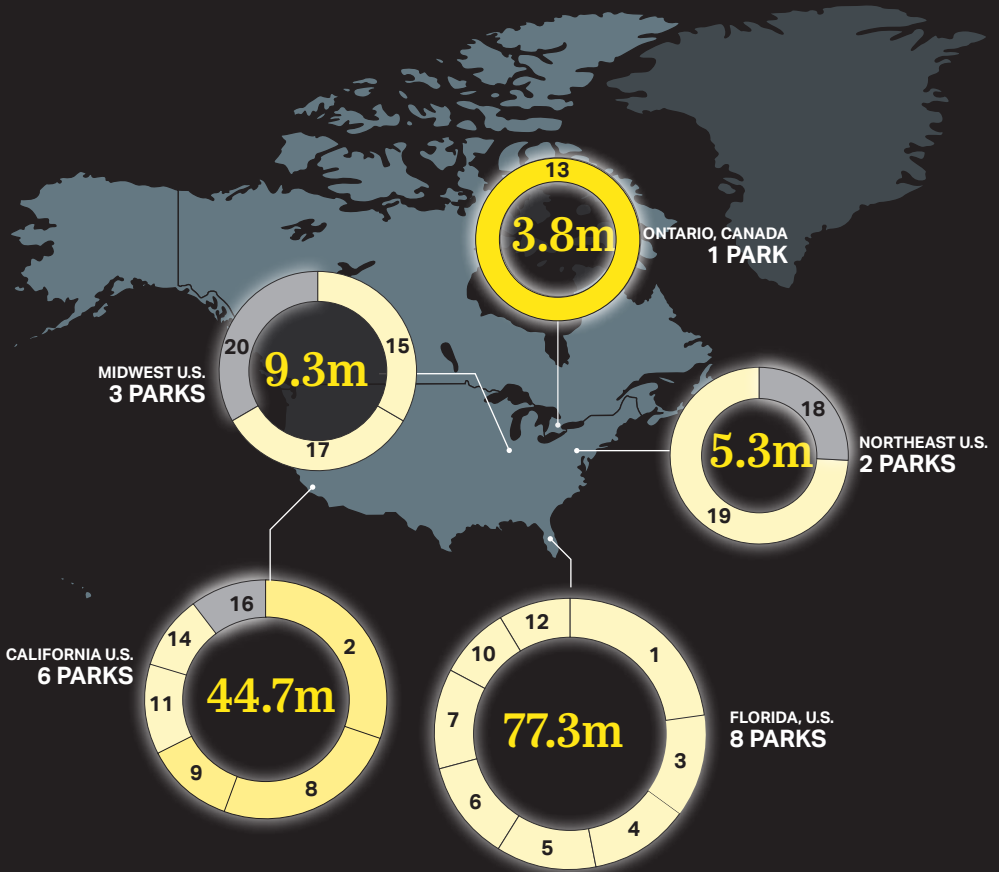
Krakatau Aqua Coaster at Universal's Volcano Bay Water Park
© Universal Destinations & Experiences



New themed area "Atlântica" opened at Magic City, Suzano, Brazil
© Magic City



Top 20 Amusement/Theme Parks North America



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Key

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9	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	53%	8,400	5,505	1,299	9,147
10	SEAWORLD ORLANDO, ORLANDO, FL, U.S.	46%	4,454	3,051	1,598	4,640
11	KNOTT'S BERRY FARM, BUENA PARK, CA, U.S.	6%	3,899	3,681	811	4,238
12	BUSCH GARDENS TAMPA BAY, TAMPA, FL, U.S.	26%	4,051	3,210	1,288	4,180
13	CANADA'S WONDERLAND, MAPLE, ONTARIO, CANADA	524%	3,768	587	-	3,950
14	SEAWORLD SAN DIEGO, SAN DIEGO, CA, U.S.	25%	3,507	2,800	1,139	3,731
15	CEDAR POINT, SANDUSKY, OH, U.S.	4%	3,444	3,327	1,020	3,610
16	SIX FLAGS MAGIC MOUNTAIN, VALENCIA, CA, U.S.	-2%	2,993	3,047	686	3,521
17	KINGS ISLAND, KINGS ISLAND, OH, U.S.	5%	3,340	3,181	1,626	3,485
18	SIX FLAGS GREAT ADVENTURE, JACKSON, NJ, U.S.	-26%	2,153	2,913	598	3,451
19	HERSHEYPARK, HERSHEY, PA, U.S.	6%	3,193	3,012	1,717	3,384
20	SIX FLAGS GREAT AMERICA, GURNEE, IL, U.S.	-5%	2,535	2,675	-	3,169
TOP 20 TOTAL ATTENDANCE 2022		34%	140,453	104,829	44,302	159,108
TOP 20 TOTAL ATTENDANCE AS% OF 2019 (PRE-PANDEMIC)						88%

© 2023 TEA / AECOM

34%

Top 20 amusement/theme parks North America attendance change 2021-22

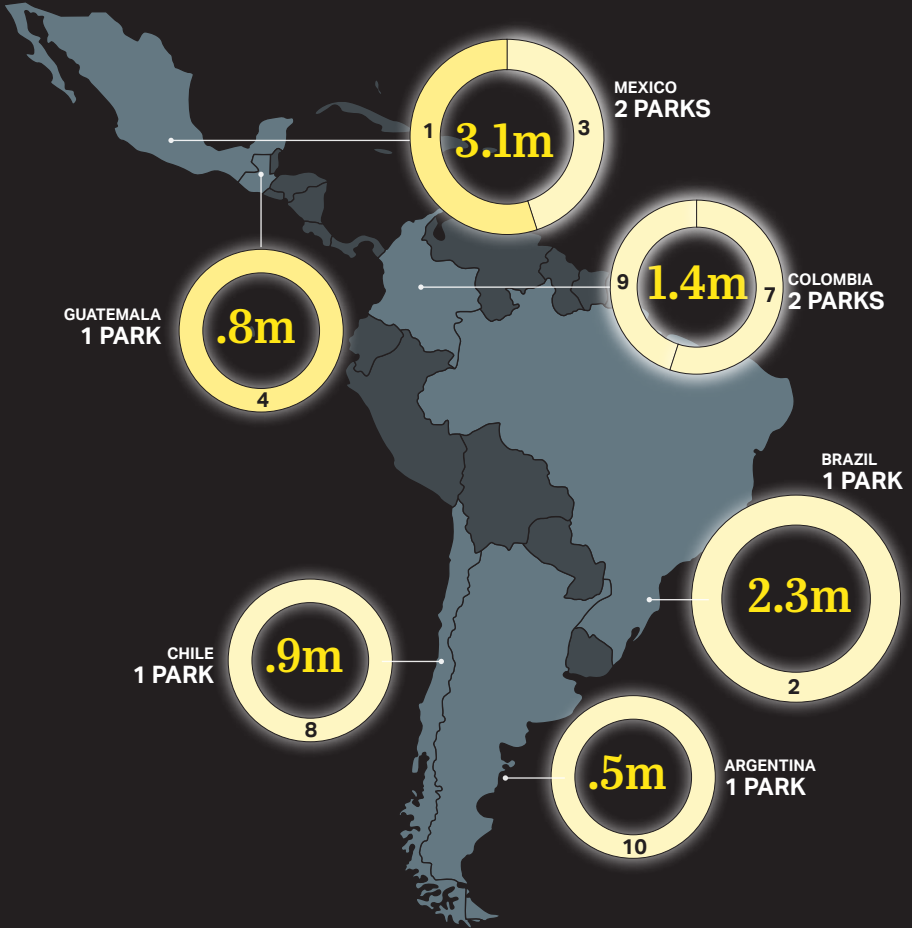
140.5m

Top 20 amusement/theme parks North America attendance 2022

104.8m

Top 20 amusement/theme parks North America attendance 2021

Top 10 Amusement/Theme Parks Latin America



2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 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 2021-2022	ATTENDANCE (in thousands)			
			2022	2021	2020	2019
1	SIX FLAGS MEXICO, MEXICO CITY, MEXICO	54%	1,727	1,125	701	2,803
2	BETO CARRERO WORLD, SANTA CATARINA, BRAZIL	23%	2,327	1,895	1,252	2,241
3	PARQUE XCARET, CANCUN, MEXICO	27%	1,399	1,104	736	1,960
4	MUNDO PETAPA, GUATEMALA CITY, GUATEMALA	99%	800	402	268	1,330
5	LA FERIA DE CHAPULTEPEC, MEXICO CITY, MEXICO	-	-	-	-	1,306
6	PLAZA DE SESAMO, MONTERREY, MEXICO	-	-	-	-	1,173
7	PARQUE MUNDO AVENTURA, BOGOTÁ, COLOMBIA	19%	752	631	344	1,151
8	FANTASIALANDIA, SANTIAGO, CHILE	38%	850	615	430	1,100
9	THEME PARQUE NACIONAL DEL CAFÉ, QUINDIO, COLOMBIA	30%	626	482	321	1,043
10	PARQUE DE LA COSTA, BUENOS AIRES, ARGENTINA	30%	514	395	263	968
TOP 10 TOTAL ATTENDANCE 2022		35%	8,995	6,649	4,315	15,075
TOP 10 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						71%

© 2023 TEA / AECOM

35%

Top 10 amusement/theme parks Latin America attendance change 2021-22

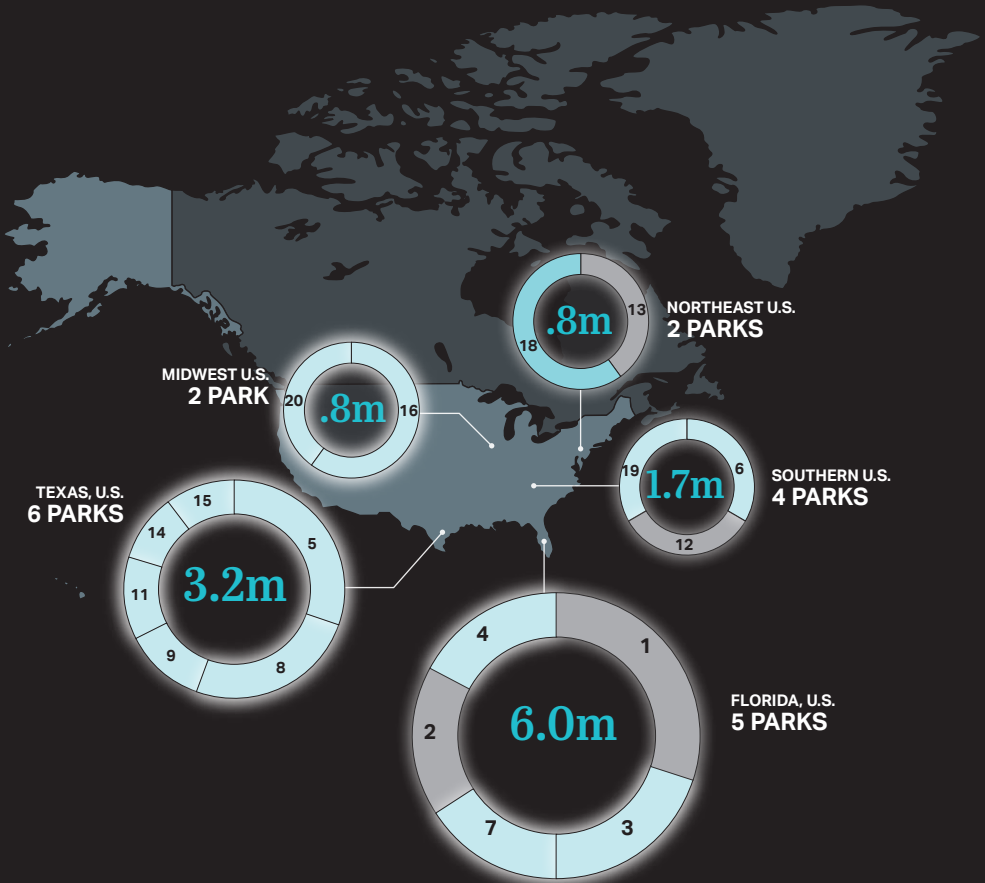
6.6m

Top 10 amusement/theme parks Latin America attendance 2022

4.3m

Top 10 amusement/theme parks Latin America attendance 2021

Top 20 Water Parks North America



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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 (in thousands)			
			2022	2021	2020	2019
1	DISNEY'S TYPHOON LAGOON WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	-	1,915	-	-	2,248
2	DISNEY'S BLIZZARD BEACH WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	-92%	101	1,201	316	1,983
3	UNIVERSAL'S VOLCANO BAY, ORLANDO, FL, U.S.	9%	1,850	1,691	551	1,811
4	AQUATICA, ORLANDO, FL, U.S.	35%	1,548	1,147	528	1,533
5	SCHLITTERBAHN, NEW BRAUNFELS, TX, U.S.	7%	946	888	451	996
6	WATER COUNTRY USA, WILLIAMSBURG, VA, U.S.	1%	707	700	-	736
7	ADVENTURE ISLAND, TAMPA, FL, U.S.	7%	636	593	125	656
8	AQUATICA SAN ANTONIO, SAN ANTONIO, TX, U.S.	8%	631	586	263	651
9	SCHLITTERBAHN, GALVESTON, TX, U.S.	34%	539	402	337	567
10	SPLISH SPLASH, CALVERTON, NY, U.S.	-	-	-	-	542
11	SIX FLAGS HURRICANE HARBOR, ARLINGTON, TX, U.S.	3%	388	377	235	538
12	SIX FLAGS WHITE WATER ATLANTA, MARIETTA, GA, U.S.	-5%	350	368	238	526
13	SIX FLAGS HURRICANE HARBOR, JACKSON, NJ, U.S.	-5%	426	448	85	482
14	TYPHOON TEXAS, KATY, TX, U.S.	7%	364	340	203	478
15	SIX FLAGS HURRICANE HARBOR SPLASHTOWN, SPRING, TX, U.S.	3%	343	333	-	475
16	ZOOMBEZI BAY, POWELL, OH, U.S.	7%	399	373	176	466
17	SIX FLAGS HURRICANE HARBOR PHOENIX, GLENDALE, AZ, U.S.	3%	318	309	-	441
18	CAMELBEACH, TANNERSVILLE, PA, U.S.	66%	373	225	151	439
19	DOLLYWOOD'S SPLASH COUNTRY, PIGEON FORGE, TN, U.S.	31%	368	281	188	433
20	CEDAR POINT SHORES, SANDUSKY, OH, U.S.	1%	405	402	-	424
TOP 20 TOTAL ATTENDANCE 2022		18%	12,607	10,664	3,847	16,425
TOP 20 ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						82%

© 2023 TEA / AECOM

18%

Top 20 water parks North America attendance change 2020-21

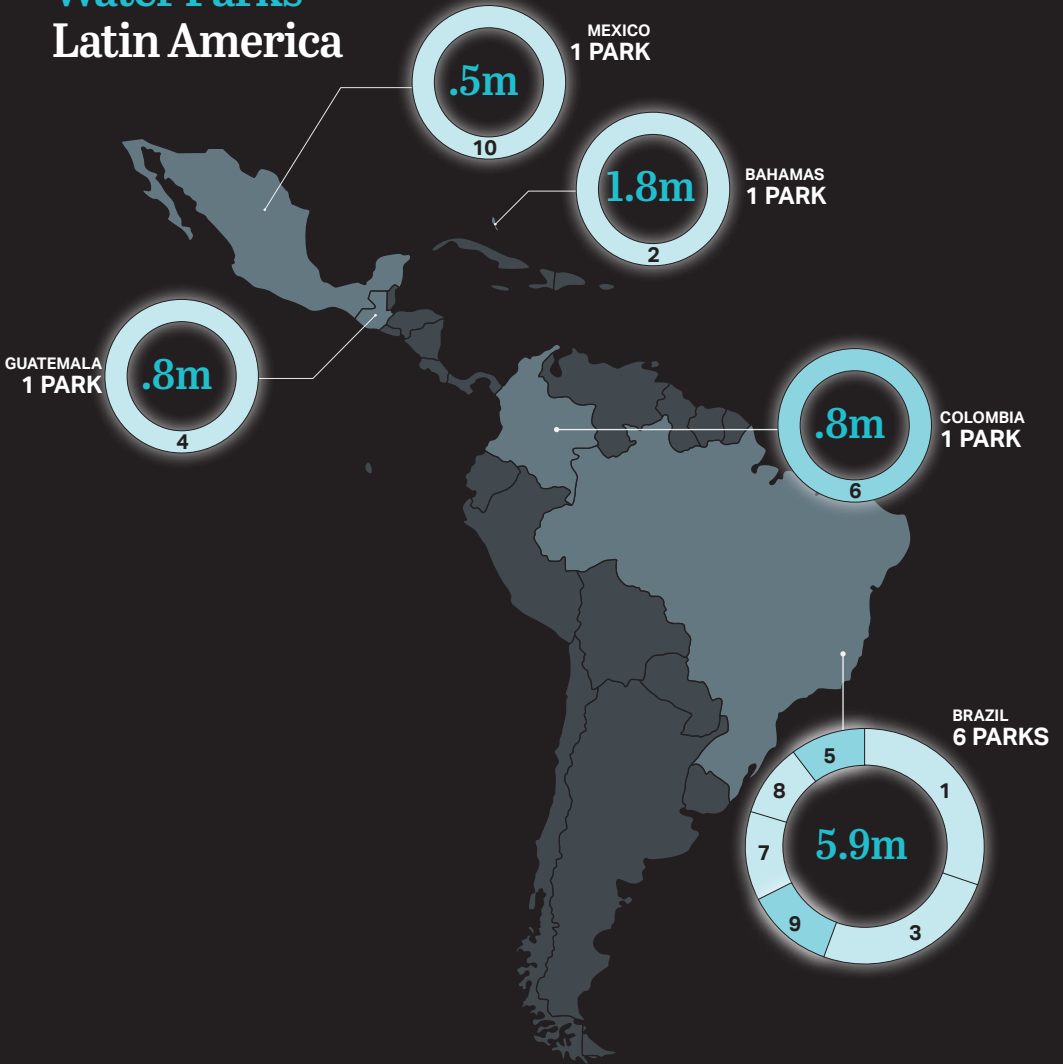
12.6m

Top 20 water parks North America attendance 2022

10.7m

Top 20 water parks North America attendance 2021

Top 10 Water Parks Latin America



2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 report.

Key

- < 0 %
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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 2021-2022	ATTENDANCE (in thousands)				
			2022	2021	2020	2019	
1	THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	47%	1,729	1,179	922	1,845	
2	BAHAMAS AQUAVENTURE WATER PARK, PARADISE ISLAND (NASSAU, NEW PROVIDENCE), BAHAMAS	38%	1,751	1,269	494	1,813	
3	HOT PARK RIO QUENTE, RIO QUENTE, BRAZIL	53%	1,430	933	734	1,469	
4	PARQUE ACUATICO XOCOMIL, SAN MARTÍN ZAPOTITLÁN, RETALHULEU, GUATEMALA	33%	833	626	121	894	
5	BEACH PARK, AQUIRAZ, BRAZIL	56%	782	500	312	890	
6	PISCILAGO, GIRARDOT (BOGOTÁ), COLOMBIA	34%	816	609	307	876	
7	MAGIC CITY WATER PARK, SUZANO, BRAZIL	32%	616	467	355	681	
8	THERMAS WATER PARK, SÃO PEDRO, BRAZIL	67%	753	452	315	641	
9	HOT BEACH, OLYMPIA, BRAZIL	54%	914	594	243	608	
10	PARQUE ACUATICO EL ROLLO, MORELOS, MEXICO	33%	489	368	210	525	
TOP 10 TOTAL ATTENDANCE 2022			45%	10,113	6,997	4,014	10,242
TOP 10 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)							99%

© 2023 TEA / AECOM

45%

Top 10 water parks Latin America attendance change 2021–22

10.1m

Top 10 water parks Latin America attendance 2022

7.0m

Top 10 water parks Latin America attendance 2021

APAC in 2022: A study of contrasts

While much of the world saw a steady pace of recovery from 2021 into 2022, the story in the Asia-Pacific region is more complex. Taken as a whole, the region's numbers were essentially flat, but there was great disparity between different countries.

Outside of China, pandemic restrictions were relaxed for nearly the entire year, resulting in impressive increases over 2021. Within China, lockdowns were more prevalent than before, drastically impacting park numbers, including a 30% drop for Shanghai Disneyland.

Nevertheless, the pandemic ushered in some trends that are here to stay. Managing park attendance and limiting ticket sales - or turning to timed entry - is good for operations by helping plan accurately for staffing and supplies, resulting in more efficient budgeting.

“
Taken as a whole, the region's numbers were essentially flat, but there was great disparity between different countries
”



Beth Chang

Executive Director –
Economics, Asia-Pacific



Chris Yoshii

Vice President –
Economics, Asia-Pacific







Asia's theme parks and water parks

Japan

Japan had an exceptionally good year and is well on its way (70-90%) to return to 2019 numbers. Getting there might not be possible - or even desirable - as major operators like Disney in Tokyo have publicly announced self-imposed attendance limits in order to create a better experience for guests. Plans are to cap their peak attendance (33 million visitors in 2019) at 75% by 2025. By managing the crowds, Disney hopes to grow per cap revenue, a strategy supported by behavior exhibited during the pandemic. Oriental Land Company, owner of the Tokyo Disney resort, is also not shy about investing in its parks, such as the Enchanted Tale of Beauty and the Beast dark ride that opened in 2022.

At Universal Studios Japan, Super Nintendo World, a home-grown brand, proved to be very popular. Once capacity restrictions were lifted, the new themed land propelled the park attendance to nearly 90% of the pre-pandemic level.

Korea

Korea is another bright spot in APAC. Although international arrivals were down to minimal levels until late 2022, domestic tourism had bounced back to nearly pre-pandemic levels. The two major parks, Lotte World and Everland, were back at 80-90%. The new Lotte World Busan hit over a million in attendance in its first year of operation, capturing a third of the city's residents.

China

Undoubtedly, 2022 was the worst year for Chinese attraction operators in the pandemic. Attendance was generally reduced to 35-50% of pre-pandemic levels. The country's biggest chains (OCT, Fantawild and Chimelong) saw a drop of 40-60% from 2021 to 2022. OCT's Happy Valley in Shanghai was hit hardest because lockdowns tended to affect major population centers the most. The power of the Disney brand seemed to help as Shanghai Disneyland, when allowed to be open, consistently brought crowds through the gates. Universal Studios Beijing was still largely affected by pandemic restrictions in 2022. It is seeing significantly improved attendance in the first six months of 2023, and the park's original attendance estimates are within reach if a good summer season ensues. Finally, Shanghai Haichang Ocean

Park achieved a notable 2.3 million guests in 2022, significant given their location in Shanghai was locked down over an extensive period. Their introduction of the Ultra Man IP, popular with Chinese boys, coincided with the summer season and a population ready to get out of their houses. They even converted a staff dorm into a popular Ultra Man themed hotel.

“

Undoubtedly, 2022 was the worst year for Chinese attraction operators in the pandemic.

”



Universal Studios Beijing
© Beijing Daily

Hong Kong

With virtually no overseas visitors throughout the year and operation days reduced to half a year, Ocean Park still managed to maintain its 2021 figure. This is still noteworthy as its efforts to attract the local market in 2021 continued to bring in people throughout 2022. Nearby, Hong Kong Disneyland continues to sell record amounts of annual passes. With an attendance of 3.4 million in 2022, Hong Kong Disneyland's penetration rate at the resident market is nearly 50%. Hong Kong's tourism market, while reopened, remains on shaky ground. Low-cost airlines and international flights dropped the city from their routes during the pandemic and it will take time and money to build up that network again.

Vietnam

Vietnam continues to be one of the fastest growing markets for the Asia leisure industry. The domestic market neared a full recovery in 2022 while international travel is recovering. Sun World is the largest theme park operator in Vietnam and investing aggressively in expansions and new projects. Sun World Ba Na Hills is the top theme park in Vietnam, achieving an attendance more than 5 million in 2019. In 2022, the park added new simulators and rides, earning 2.2 million visitors in the process - notable given the delayed recovery from the international market. Sun World Hon Thom in Phu Quoc added Vietnam's first wooden rollercoaster. With continuous investments and new park openings during the pandemic, attendance under the Sun World Group has surpassed its pre-pandemic level.



"Momentous" Nighttime Spectacular debuts at Hong Kong Disneyland.

© Disney



Singapore

Arguably, Singapore is leading the recovery in SE Asia. In addition to making the decision to reopen the country relatively early, the government has also pushed airlines to resume capacity to the country, resulting in an overall 50% return of tourism numbers. This helped boost attendance to Sentosa Island and the resident park, Universal Studios Singapore, whose attendance increased by 75% compared with 2021. There remains room to grow as the country attempts to return to pre-pandemic tourism highs.

“

Overall, the water park market has shown strong recovery. Other than Australia, Korea and Malaysia are the other two countries that saw the most consistent recovery among their water parks.

”

Water Parks

The water park figures are even more location specific. Overall, the market has shown strong recovery. Other than Australia, Korea and Malaysia are the other two countries that saw the most consistent recovery among their water parks. Not only had year-to-year attendance jumped, but their numbers are back to 75-80% of pre-pandemic level.

Some, such as Ancols Park in Jakarta, had such a shortened operating season in 2021 that their 2022 numbers show a 700% increase, but even that still leaves them 1/3 of the way to 2019 figures.

Chinese water parks faced more pandemic lockdowns and as such frequently saw drops in attendance compared to the previous year.

When lockdowns coincided with busy summer months, results suffered dramatically. OCT's Playa Maya park in Shanghai plummeted 70% because of the lockdowns. By comparison, Poseidon Beach Water World in Harbin was able to operate June through August and saw a modest 7% increase.

In a final, perfect example of the unusual and uneven results in the region during the pandemic, we turn to Atlantis Aquaventure Sanya. In last year's report, we highlighted the park's notable success rate in 2021 as a wealthy and captive Chinese population was able to travel to Hainan island to escape Covid. With the arrival of the Omicron variant in 2022, China locked down the island and the park saw a 50% drop from the previous year.

Regional Water Park Pipeline

Major parks in the region are well positioned for recovery, though the area is still handicapped by China's massive population not yet fully able to return to pre-pandemic outbound tourism numbers. Though Chinese travel restrictions are mostly lifted, availability and access to travel visas remains challenging and the country's economy took a major hit from the pandemic.

The reinvestment engine critical for sustained growth has restarted, but not as quickly as in other parts of the world. We are cautiously optimistic that 2023 will be a year of financial recovery for Asian parks and reinvestment in properties will start to happen in 2024. A more healthy and stable industry may not materialize until 2025, though many economic, political and cultural variables could easily impact that projection.



82.3m

Top 20 theme parks in
Asia-Pacific attendance 2022

13.7m

Top 20 water parks in
Asia-Pacific attendance 2022

77.0m

Top 20 theme parks in
Asia-Pacific attendance 2021

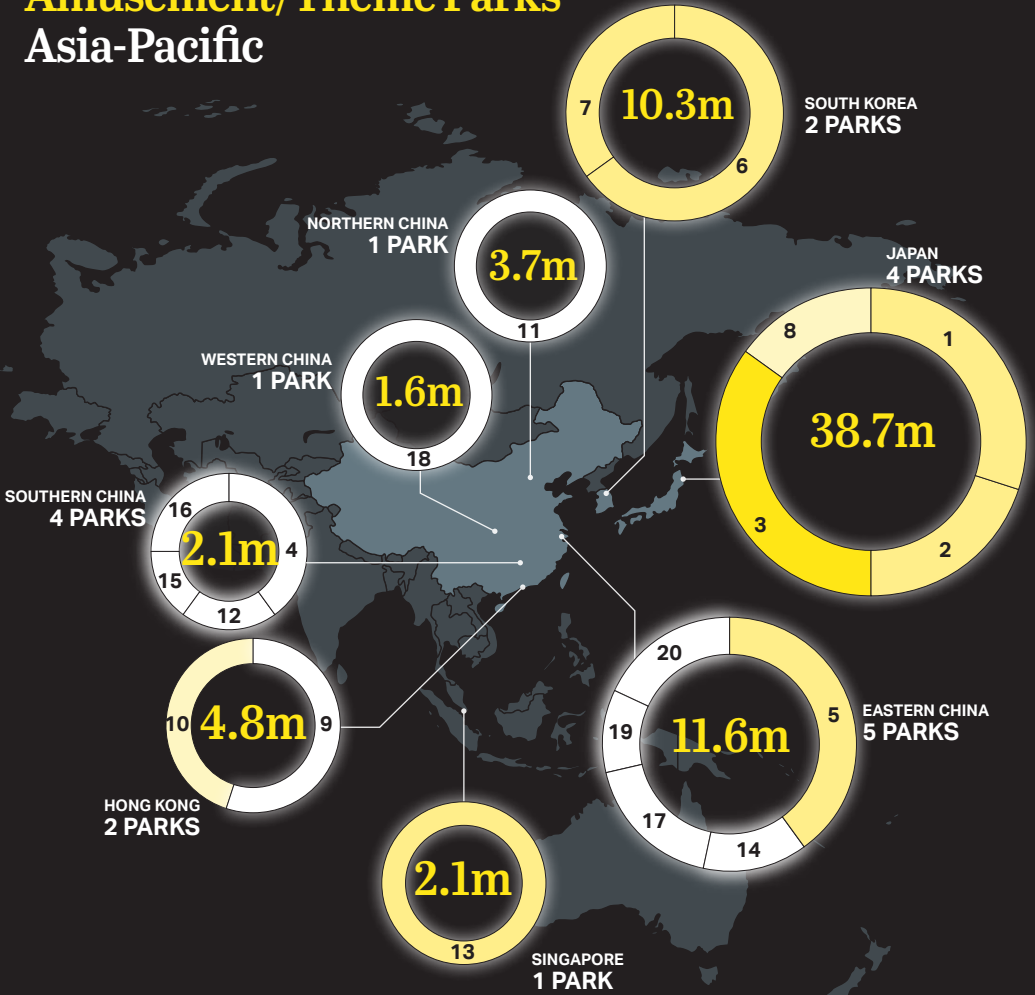
11.9m

Top 20 water parks in
Asia-Pacific attendance 2021



Night Park at Sunway Lagoon, Kuala Lumpur Malaysia.
© Sunway Lagoon

Top 20 Amusement/Theme Parks Asia-Pacific



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Key

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2019 RANK	PARK LOCATION	% CHANGE (2021-2022)	ATTENDANCE (in thousands)			
			2022	2021	2020	2019
1	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	90%	12,000	6,300	4,160	17,910
2	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	74%	10,100	5,800	3,400	14,650
3	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	125%	12,350	5,500	4,901	14,500
4	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	-41%	4,400	7,452	4,797	11,736
5	SHANGHAI DISNEYLAND AT SHANGHAI DISNEY RESORT, SHANGHAI, CHINA	-38%	5,300	8,480	5,500	11,210
6	EVERLAND, SEOUL, SOUTH KOREA	56%	5,770	3,710	2,760	6,606
7	LOTTE WORLD, SEOUL, SOUTH KOREA	84%	4,520	2,460	1,560	5,953
8	NAGASHIMA SPA LAND, KUWANA, JAPAN	17%	4,200	3,600	2,400	5,950
9	OCEAN PARK, HONG KONG SAR	0%	1,400	1,400	2,200	5,700
10	HONG KONG DISNEYLAND, HONG KONG SAR	21%	3,400	2,800	1,700	5,695
11	OCT HAPPY VALLEY, BEIJING, CHINA	-24%	3,740	4,930	3,950	5,160
12	CHIMELONG PARADISE, GUANGZHOU, CHINA	-41%	2,300	3,890	2,681	4,905
13	UNIVERSAL STUDIOS SINGAPORE, SINGAPORE	75%	2,100	1,200	1,098	4,500
14	CHINA DINOSAUR PARK, CHANGZHOU, CHINA	-12%	2,200	2,500	2,375	4,434
15	OCT WINDOW OF THE WORLD, SHENZHEN, CHINA	-54%	1,100	2,400	1,890	3,990
16	OCT HAPPY VALLEY, SHENZHEN, CHINA	-47%	1,750	3,310	3,120	3,980
17	ZHENGZHOU FANTAWILD ADVENTURE, ZHENGZHOU, CHINA	-42%	1,590	2,752	3,421	3,840
18	OCT HAPPY VALLEY, CHENGDU, CHINA	-47%	1,570	2,940	2,620	3,580
19	NINGBO FANTAWILD ORIENTAL HERITAGE, NINGBO, CHINA	-47%	1,230	2,308	2,257	3,575
20	OCT HAPPY VALLEY, SHANGHAI, CHINA	-62%	1,240	3,300	2,730	3,390
TOP 20 TOTAL ATTENDANCE 2022		7%	82,260	77,032	59,520	141,264
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						58%

© 2023 TEA / AECOM

7%

Top 20 amusement/theme parks attendance change Asia-Pacific 2021-22

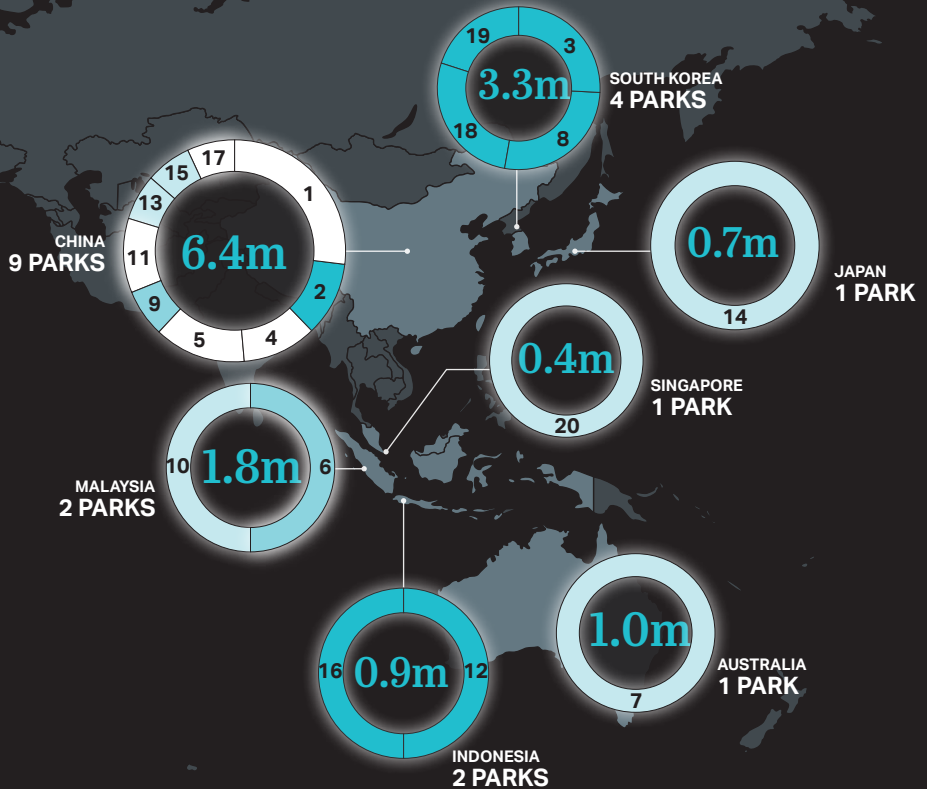
82.3m

Top 20 amusement/theme parks Asia-Pacific attendance 2022

77.0m

Top 20 amusement/theme parks Asia-Pacific attendance 2021

Top 20 Water Parks Asia-Pacific



2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 report.

Key

- < 0%
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2019 RANK	PARK LOCATION	% CHANGE (2020-2021)	ATTENDANCE (in thousands)			
			2022	2021	2020	2019
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	-27%	1,620	2,230	1,512	3,014
2	WUHU FANTAWILD WATER PARK, WUHU, CHINA	115%	928	431	770	1,348
3	CARIBBEAN BAY, SEOUL, SOUTH KOREA	348%	995	222	168	1,333
4	PLAYA MAYA WATER PARK, WUHAN, CHINA	-23%	560	730	930	1,210
5	AQUAVENTURE ATLANTIS, SANYA, CHINA	-48%	630	1,200	1,200	1,200
	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	58%	950	600	600	1,200
7	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	6%	1,030	970	952	1,120
8	OCEAN WORLD, HONGCHEON, SOUTH KOREA	552%	750	115	180	1,071
9	POSEIDON BEACH WATER WORLD, HARBIN, CHINA	7%	625	582	300	917
10	SUNWAY LOST WORLD OF TAMBUN, PERAK, MALAYSIA	33%	800	600	600	1,000
11	PLAYA MAYA WATER PARK, SHANGHAI, CHINA	-73%	290	1,080	860	970
12	ATLANTIS WATER ADVENTURE, JAKARTA, INDONESIA	777%	263	30	220	910
13	ZHENGZHOU FANTAWILD WATER PARK, ZHENGZHOU, CHINA	9%	484	443	622	905
14	SUMMERLAND, TOKYO, JAPAN	6%	690	650	454	868
15	XIAMEN FANTAWILD WATERPARK, XIAMEN, CHINA	23%	674	548	442	832
16	THE JUNGLE WATER ADVENTURE, BOGOR, WEST JAVA, INDONESIA	117%	582	268	200	785
17	PLAYA MAYA WATER PARK, TIANJIN, CHINA	-14%	630	730	550	750
	WOONGJIN PLAYDOCI WATERDOCI, BUCHEON, SOUTH KOREA	252%	327	93	146	750
19	LOTTE WATER PARK, GIMHAE, SOUTH KOREA	603%	548	78	133	740
20	ADVENTURE COVE WATER PARK, SINGAPORE	9%	360	330	300	710
TOP 20 TOTAL ATTENDANCE 2022		15%	13,736	11,930	11,139	21,633
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						63%

© 2023 TEA / AECOM

15%

Top 20 water parks Asia-Pacific attendance change 2021–22

13.7m

Top 20 water parks Asia-Pacific attendance 2022

11.9m

Top 20 water parks Asia-Pacific attendance 2021

Moving past pre-pandemic levels into a post-pandemic world

By all accounts, 2022 was a successful year for the EMEA region. Many theme parks had record attendance compared to 2019, evidence of pent-up demand coupled with the ease of access for most European parks.

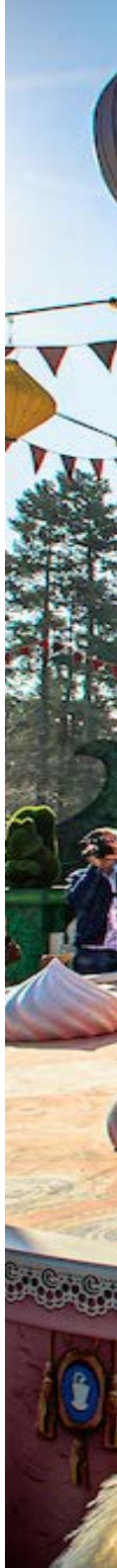
Less reliant on tourism from outside the continent, European parks showed resilience in recovery. Even Disneyland Paris, arguably the European theme park most impacted by reduced international travel, had a record year. The bellwether regional destination resorts of Europa-Park, Efteling and PortAventura all broke records. Added together, the attendance figures for 2022 show a 98% recovery rate to 2019 numbers.

Water parks also did particularly well, although the impact of the Omicron variant extended into the first quarter of 2022. Northern European water parks, more likely to be indoor facilities, were therefore negatively affected by restrictions. Still, the market recorded attendance at an impressive 96% of pre-Covid numbers.



Jodie Lock

Associate Director –
Economics, EMEA





Many parks took the pandemic time to further execute their sustainability plans. Parks in the EMEA region, such as PortAventura with its BCorp status and PortAventura Solar project, are leading the way in reducing their waste and carbon footprints, turning to renewable power, and implementing ecologically sound operating procedures.

Because we have kept rankings in place during pandemic recovery, theme parks in the Middle East and Africa are not included in our list. Our research indicates that an updated ranking would not include parks from these areas – yet! Continued strategy realignment and investment, including a planned Harry Potter land in the UAE, might be just the development needed for these parks to break into the top rankings

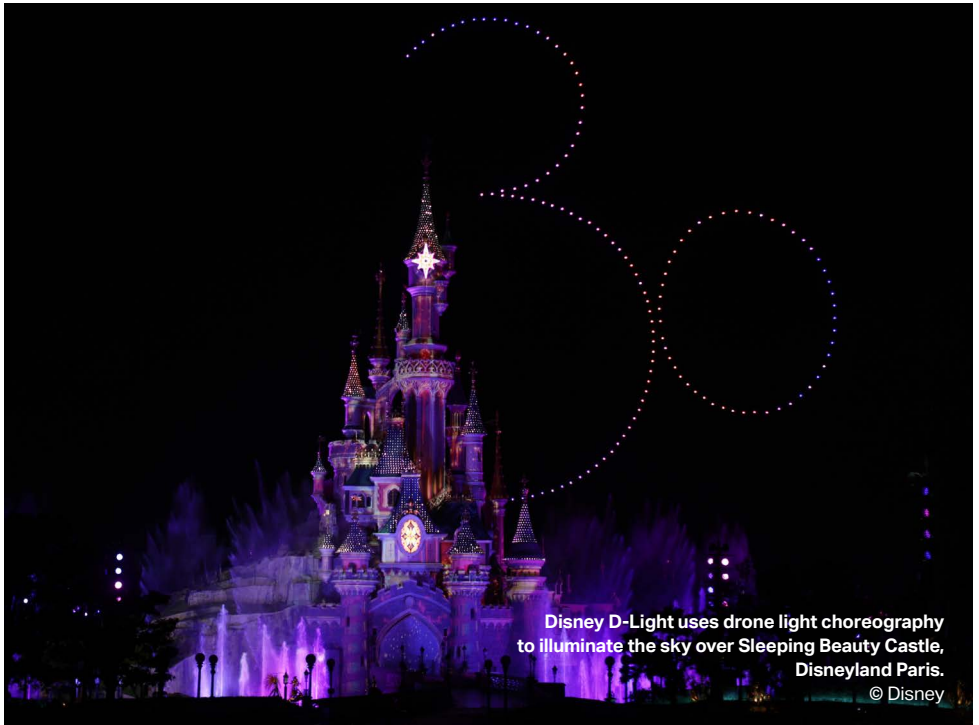
“

Less reliant on tourism from outside the continent, European parks showed resilience in recovery.

”

Regional destination park highlights:

- Disneyland Paris had its biggest year on record, perhaps helped by the park’s 30th anniversary, a new Avengers campus and Marvel-themed hotel.
- Europa-Park as a resort doubled their attendance from 2021 and is up 4% from 2019. With ongoing reinvestment, full operation of indoor waterpark Rulantica (900,000 visitors in 2022), six hotels and a



Disney D-Light uses drone light choreography to illuminate the sky over Sleeping Beauty Castle, Disneyland Paris.

© Disney



new immersive dining experience, Europa-Park is quickly delivering on their plans to become a major destination.

- Efteling celebrated their 70th anniversary and recorded a new attendance high, assisted in part from a robust return of passholders and delayed school groups. A new hotel and haunted attraction are under construction for 2024.
- PortAventura recorded resort-wide attendance on par with 2019 and record revenues of €285 million. In 2022 they acquired two hotels outside the resort on the Costa Dorada, marking a new model of growth for the resort. 2023 will bring the new dark ride roller coaster Uncharted.
- Liseberg recorded the highest revenue and profit ever, even though attendance hasn't caught up as fast as other parts of Europe. Similar to several other parks around the globe, Liseberg is opting to limit attendance in order to provide a

better guest experience, boosting levels of customer satisfaction and, hopefully, revenue. 2023 marks Liseberg's 100th anniversary and opening of a new hotel, roller coaster and indoor waterpark, Oceana.

- Tivoli, as a year-round destination, was impacted by closure restrictions at the start of 2022, but still tallied record high revenue and a blockbuster July. The park is approaching its 180th anniversary and expecting even bigger numbers to return in the months leading up to that.
- Parc Asterix is reaping the rewards of years of reinvestment, new attractions and hotels. They were up 14% over 2019 figures and Toutatis, their new roller coaster that opened spring 2023 is sure to continue to bring in crowds.
- Parque Warner has been affected by a decline in international tourism and has not yet recovered to pre-Covid levels. The park

has consciously opted to pursue a high-yield strategy and limit capacity, focusing on individualized experiences.

- Puy du Fou, known for its historical frescoes, welcomed 2.34 million visitors in 2022, a record since the creation of the site by Philippe de Villiers in 1989.
- Futuroscope exceeded pre-pandemic attendance levels, which aligns with other parks in France. The waterpark Aquascope is in the works, hopefully elevating Futuroscope into the destination park category.

Merlin

As a major operator in the region with eight parks in the top 20, Merlin makes up a huge portion of the EMEA attendance figures. Merlin's 2022 figures are not finalized so we have estimated totals based

on mid-year reporting, comparable park evaluations and other strategies in line with standard research methodologies. As a result, we are confident their EMEA parks, similar to neighboring parks, performed exceptionally well. Their development of Jumanji IP at Chessington and Gardaland is likely to be expanded to other parks in coming years.

63.4m

Top 20 theme parks in EMEA attendance 2022

36.1m

Top 20 theme parks in EMEA attendance 2021



The Tonnerre 2 Zeus roller coaster at Parc Asterix
Credit: Parc Asterix / A. Sobczyk



United Kingdom

Visitor attractions in the U.K. in general have not had as robust a recovery as elsewhere in Europe. Overall tourism levels were 25% less than before the pandemic. Brexit travel complications haven't helped, but the absence of Chinese visitors also played a role. Changes to U.K. duty-free rules have made the destination less attractive for shoppers, and that undoubtedly impacts attraction attendance as well, particularly in Central London.

United Arab Emirates

Despite a successful run of Expo 2020 Dubai (which operated October 2021 to March 2022), tourism is still down 14% from 2019, but up 97% year-over-year. Dubai and Abu Dhabi have successfully established their identity as vacation and entertainment

destinations during harsh winters in northern Europe and Russia. However, the role theme parks are playing leaves room for growth. The announcement in November 2022 of a Harry Potter land being added to Warner Bros. World Abu Dhabi shows that Middle East operators are willing to continue to invest in the parks in an effort to drive visitation.

Africa

The two largest parks, Ushaka Marine World in Durban and Gold Reef City in Johannesburg, both get in the 800,000 – 1,000,000 attendance range, but the parks – and larger region – have struggled to recover from Covid. Part of the challenge is in finding financial backing to invest in the parks. Ushaka recently petitioned the South African council for funds for exactly that purpose.



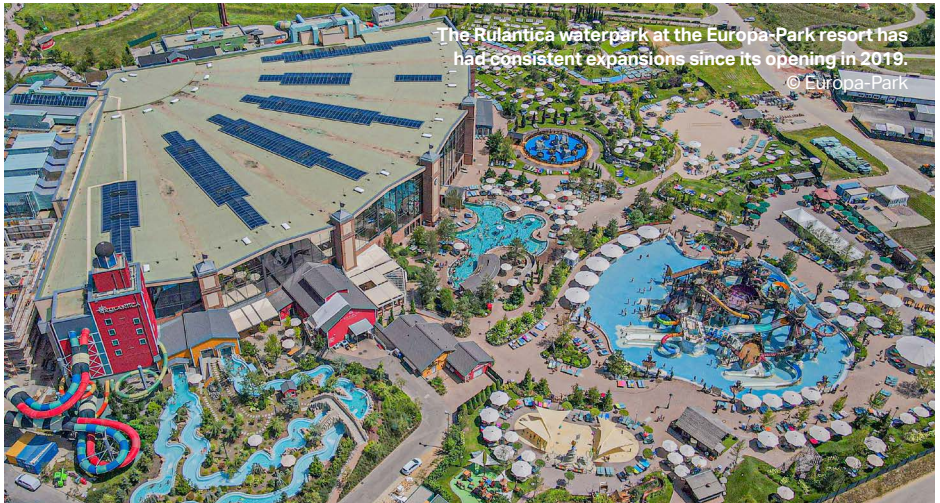
New ride 'Uncharted - The Enigma of Penitence' at PortAventura World.

© PortAventura



Therme Erding's Rainbow Racer, where guests can compete to get to the bottom of the slide first.

© Therme Erding



Water Parks

European water parks did well, overall achieving 96% of 2019 numbers. But the indoor nature of many parks in the north caused them to lose valuable operating days as Covid lockdowns interrupted the first three months of the year. The notable regional exception is Lalandia in Billund, Denmark. Billund saw impressive tourism numbers throughout the year, resulting in a gain of 3% over 2019. Once allowed to reopen, parks like Therme Erding saw record-breaking attendance. Aquaventure and Wild Wadi in Dubai also gained over 2019. Aquaventure benefited from the 2021 opening of a significant water park expansion, including the upscale Atlantis The Royal hotel. The added park and room capacity resulted in an impressive 13% gain, a standout in the waterpark crowd.

It should be noted that Europa-Park's Rulantica indoor water park, opened in 2021, had 900,000 visitors in 2022, enough to land them in the top water park list. Once we return to reranking parks post-pandemic, we expect to see Rulantica on the list.

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European water parks did well, overall achieving 96% of 2019 numbers.

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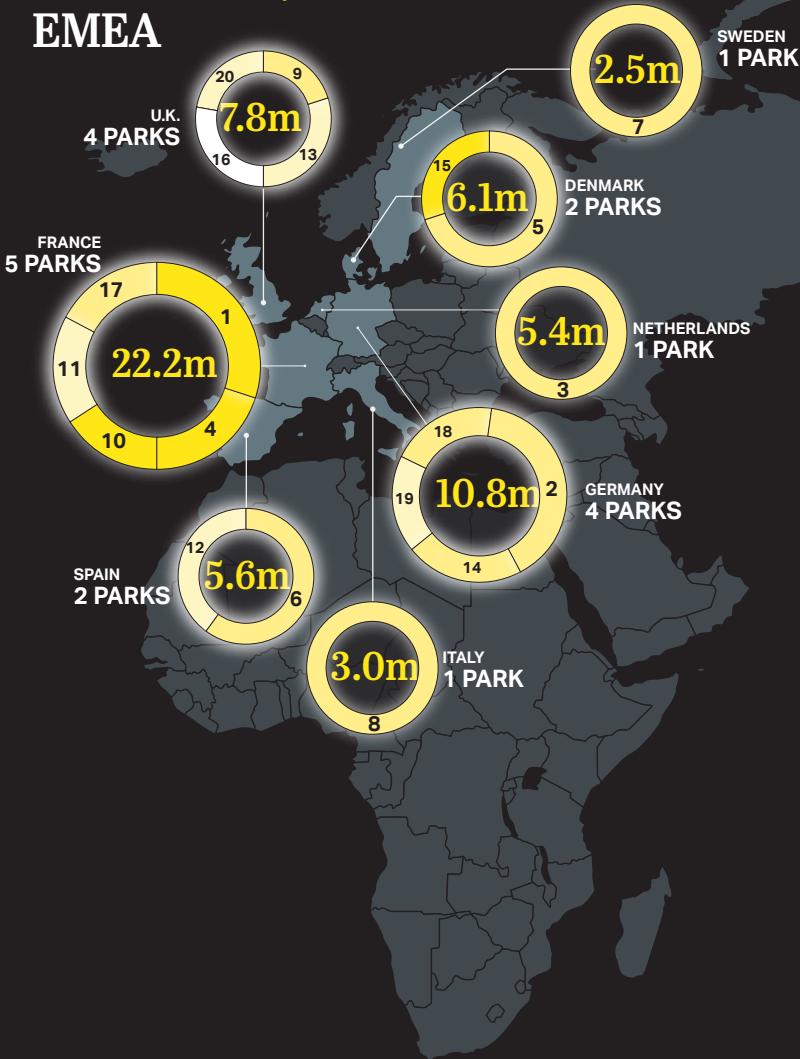
10.3m

Top 10 water parks in EMEA attendance 2022

5.1m

Top 10 water parks in EMEA attendance 2021

Top 20 Amusement/Theme Parks EMEA



2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 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 2021-2022	ATTENDANCE (in thousands)			
			2022	2021	2020	2019
1	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	184%	9,930	3,500	2,620	9,745
2	EUROPA-PARK, RUST, GERMANY	80%	5,400	3,000	2,500	5,750
3	DE EFTELING THEME PARK RESORT, KAAFSHEUVEL, NETHERLANDS	65%	5,430	3,300	2,900	5,260
4	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	183%	5,340	1,884	1,410	5,245
5	TIVOLI GARDENS, COPENHAGEN, DENMARK	61%	3,864	2,400	1,628	4,581
6	PORTAVENTURA WORLD, SALOU, SPAIN	56%	3,750	2,400	700	3,750
7	LISEBERG, GOTHENBURG, SWEDEN	73%	2,500	1,447	-	2,950
8	GARDALAND, CASTELNUOVO DEL GARDA, ITALY	34%	2,950	2,200	1,350	2,920
9	LEGOLAND WINDSOR, WINDSOR, U.K.	60%	2,400	1,500	450	2,430
10	PARC ASTERIX, PLAAILLY, FRANCE	102%	2,632	1,300	1,163	2,326
11	PUY DU FOU, LES EPESSES, FRANCE	45%	2,342	1,616	923	2,308
12	PARQUE WARNER, MADRID, SPAIN	43%	1,860	1,300	450	2,232
13	ALTON TOWERS, STAFFORDSHIRE, U.K.	28%	2,300	1,800	670	2,130
14	PHANTASIALAND, BRÜHL, GERMANY	78%	2,100	1,180	1,000	2,050
15	LEGOLAND BILLUND, BILLUND, DENMARK	164%	2,242	850	700	1,950
16	THORPE PARK, CHERTSEY, U.K.	-6%	1,600	1,700	600	1,900
	FUTUROSCOPE, JAUNAY-CLAN, FRANCE	75%	1,920	1,100	900	1,900
18	LEGOLAND DEUTSCHLAND, GÜNZBURG, GERMANY	89%	1,700	900	750	1,700
	HEIDE PARK, SOLTAU, GERMANY	23%	1,600	1,300	950	1,700
20	CHESSINGTON WORLD OF ADVENTURES, CHESSINGTON, U.K.	3%	1,500	1,450	510	1,690
TOP 20 TOTAL ATTENDANCE 2022		75%	63,361	36,127	22,174	64,517
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						98%

© 2023 TEA / AECOM

75%

Top 20 amusement/
theme parks EMEA
attendance change
2021-22

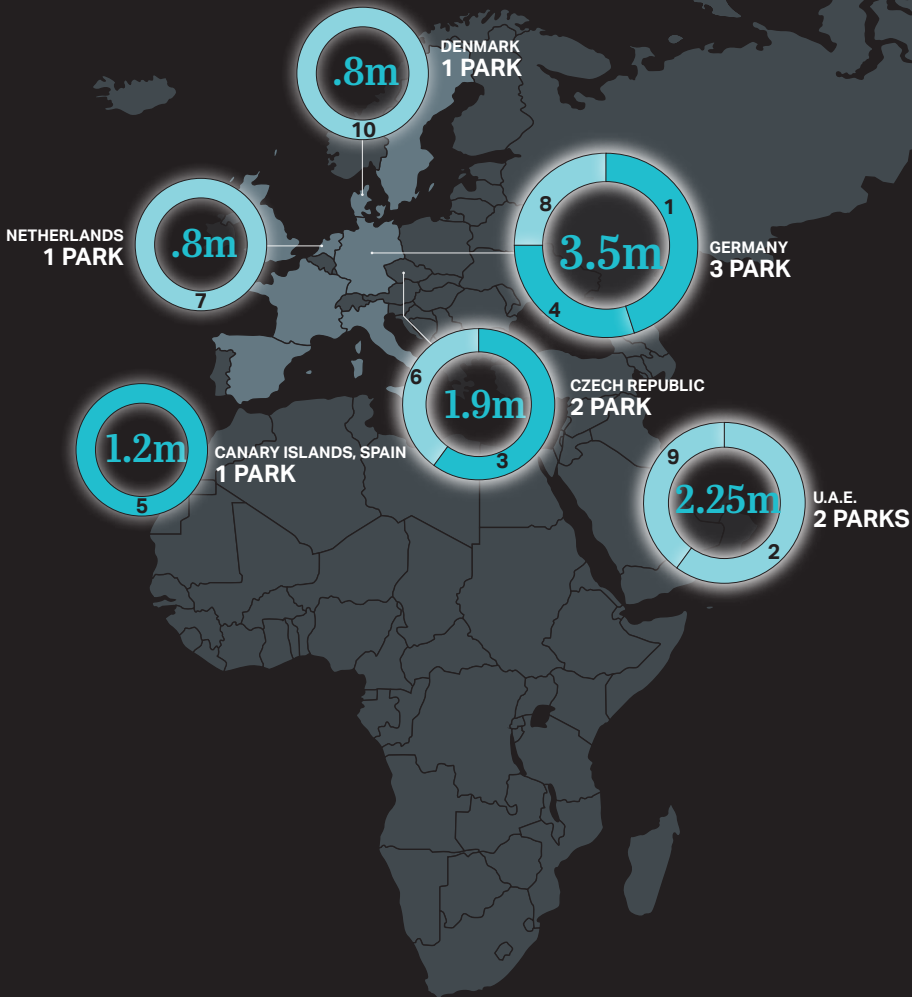
63.4m

Top 20 amusement/
theme parks EMEA
attendance 2022

36.1m

Top 20 amusement/
theme parks EMEA
attendance 2021

Top 10 Water Parks EMEA



2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 report.

Key

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- 51% - 100%
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- 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 2021-2022	ATTENDANCE (in thousands)			
			2022	2021	2020	2019
1	THERME ERDING, ERDING, GERMANY	143%	1,700	700	750	1,850
2	AQUAVENTURE WATER PARK, DUBAI, U.A.E.	88%	1,500	800	600	1,322
3	AQUAPALACE, PRAGUE, CZECH REPUBLIC	107%	1,200	580	537	1,300
4	TROPICAL ISLANDS, KRAUSNICK, GERMANY	130%	1,150	500	493	1,233
5	SIAM PARK, SANTA CRUZ DE TENERIFE, SPAIN	125%	1,150	511	97	1,200
6	AQUALAND MORAVIA, PASOHLÁVKY, CZECH REPUBLIC	88%	727	386	368	806
7	TIKI POOL, DUINRELL, NETHERLANDS	88%	750	400	390	800
8	NETTEBAD, OSNABRÜCK, GERMANY	87%	650	347	311	756
9	WILD WADI, DUBAI, U.A.E.	60%	750	470	350	740
10	LALANDIA, BILLUND, DENMARK	67%	750	450	240	682
TOP 10 TOTAL ATTENDANCE 2022		101%	10,327	5,144	4,136	10,689
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						97%

© 2023 TEA / AECOM

101%

Top 10 water parks EMEA attendance change 2021–22

10.3m

Top 10 water parks EMEA attendance 2022

5.1m

Top 10 water parks EMEA attendance 2021

Global Museum Recovery: Uncovering the Patchwork of Post-Pandemic Progress

In many ways, museums around the globe shared similar regional recovery challenges as theme and water parks. But as indoor attractions that operate year-round in major urban locations, they faced additional hurdles from the Covid Omicron variant in the first quarter of 2022, which is reflected in the overall pandemic recovery numbers.

In Europe and the US, restrictions were largely lifted by the spring, but the loss of the first few months of the year due to Omicron, coupled with international tourism levels in major cities below pre-pandemic levels, kept museums across both regions at roughly 70% of 2019 levels. By comparison, museum attendance in Asia only reached around 40% of pre-pandemic levels, with results varying tremendously depending on the institution and geographic area. Chinese museums in Beijing and Shanghai were subject to lockdowns and closures through most of the year, but other countries, like South Korea, saw very strong performance, with numbers bouncing back at or slightly above 2019 levels.



Linda Cheu

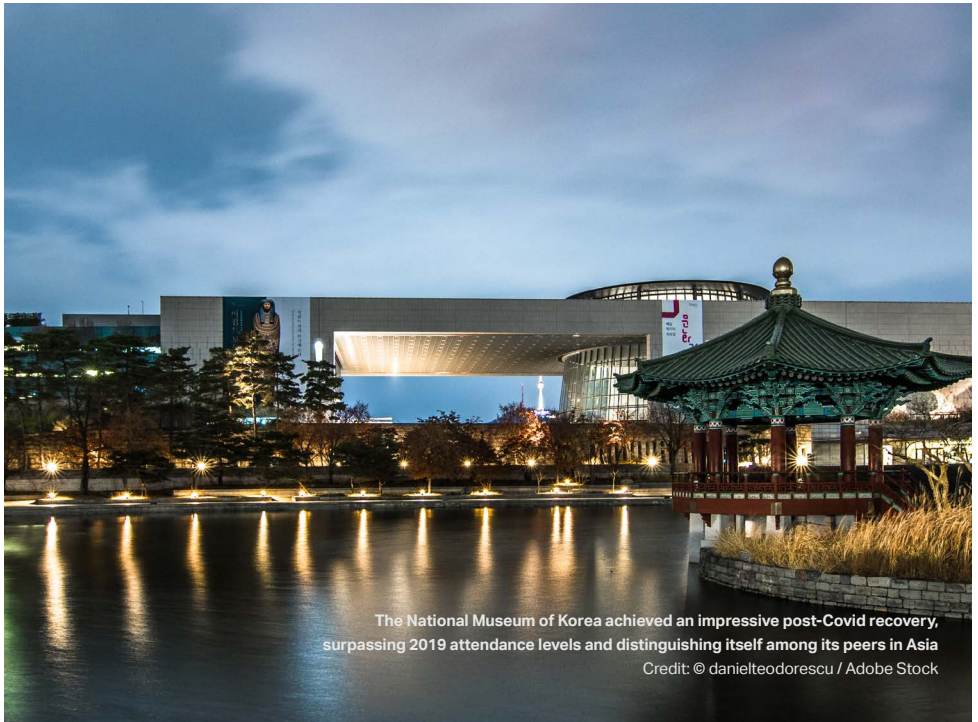
Vice President –
Economics, Americas





The Museum of Science and Industry in Chicago welcomed a SpaceX Dragon spacecraft in 2022, to become part of a permanent exhibit in 2023.

© Museum of Science and Industry, Chicago



The National Museum of Korea achieved an impressive post-Covid recovery, surpassing 2019 attendance levels and distinguishing itself among its peers in Asia

Credit: © danielteodorescu / Adobe Stock

Through our research we identified several trends impacting the museum market. Some are a continuation of existing trends while others appear to be emerging. First, and perhaps unsurprisingly, people's attention spans are decreasing, and their appetite for unique and engaging experiences is increasing. They are also looking for more opportunities to spend time together with family and friends. Museums are competing for visitors with all kinds of attractions and have to meet these guest needs in order to be successful. While temporary exhibits will also be important to museum attendance, we have started to see some museums pivot away from the blockbuster model, and instead focus reinvestment dollars on more permanent, immersive content. Across the industry, we are seeing museums explore and plan for major reinvestment into the visitor experience as they recover from the pandemic and look to the future.

The pandemic elevated museums to the role of thought leaders and knowledge-bearers in their communities. Even as visitors are returning to museums, the institutions still have a role to play in being a forum for ideas and conversation that is not confined to the walls of the museum. Many museums have invested in new partnerships and experiences outside their on-site facilities. The Denver Museum of Nature and Science, for example, operates two museum experiences in shopping centers – Zoom to Mars at Colorado Mills and Dinosaur Gulch in the Cherry Creek Shopping Center.

Another byproduct of the pandemic is how museums approach their outdoor spaces, which have become a precious commodity for guests. Museums are looking for new ways to engage their entire campuses, and outdoor events like food trucks, music festivals, or other adult- and family-driven

events have been effective ways to gain visibility.

Finally, as we mentioned in last year's report, museums continue to focus on increasing diversity in attendance, often through coordinated programming with community organizations, developing workforce diversity and ticketing initiatives

EMEA

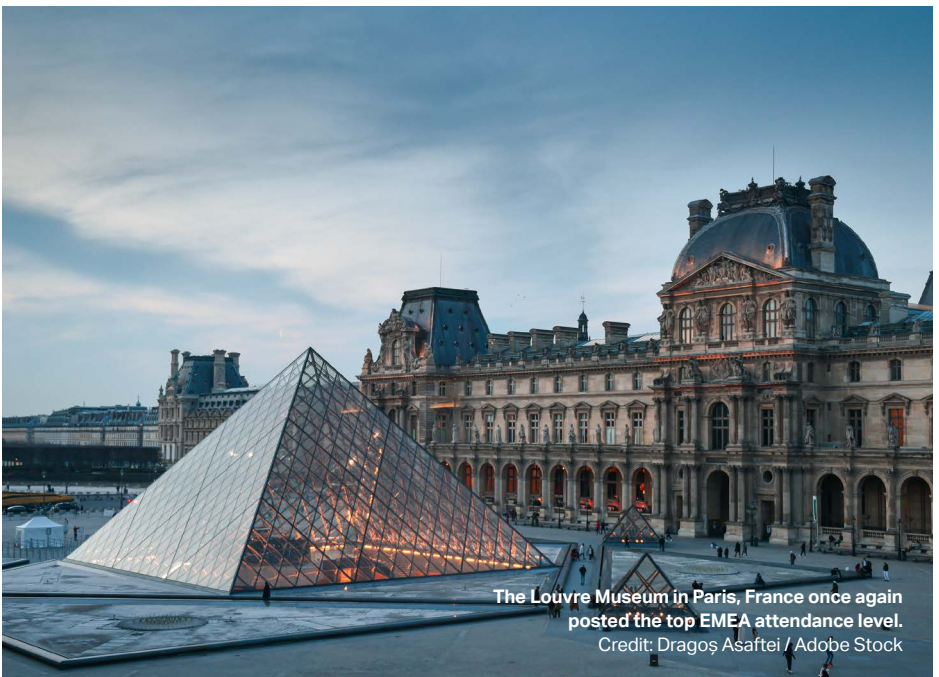
2022 continued the trend of recovery for museums in the EMEA region. Comparisons with 2021 show improvements for many facilities exceeding 200%, particularly in countries that had previously enacted strict lockdowns, like the U.K. Still, most museums remain down 20 to 40% compared to 2019, mostly due to weakened international travel and Omicron restrictions in the early part of the year. Similar to many indoor waterparks in the region, the impact on attendance in

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The pandemic elevated museums to the role of thought leaders and knowledge-bearers in their communities.

Even as visitors are returning to museums, the institutions still have a role to play in being a forum for ideas and conversation that is not confined to the walls of the museum.

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Q1 was more acutely felt for museums as compared to seasonal theme parks which enjoy outdoor facilities and a season that largely avoided lockdowns. Other outdoor cultural attractions, such as botanical gardens, also recovered faster, perhaps as lingering pandemic habits prompted people to seek out more time outside.

Two countries account for a majority of the EMEA list, and they are a study in contrasts. France saw an early and sustained return to tourism, resulting in The Louvre remaining at the top spot on our list. Still, their attendance was down 20% from 2019, though we may not see those numbers for quite some time as The Louvre plans to limit visitors and reduce overcrowding.

On the other end of the spectrum, U.K. museums have not experienced as robust a recovery due to ongoing challenges to the tourism industry. Complexities of Brexit, fewer Chinese visitors, the war in Ukraine, bad weather, transportation strikes, and the elimination of duty-free shopping all played a role in limiting tourists.

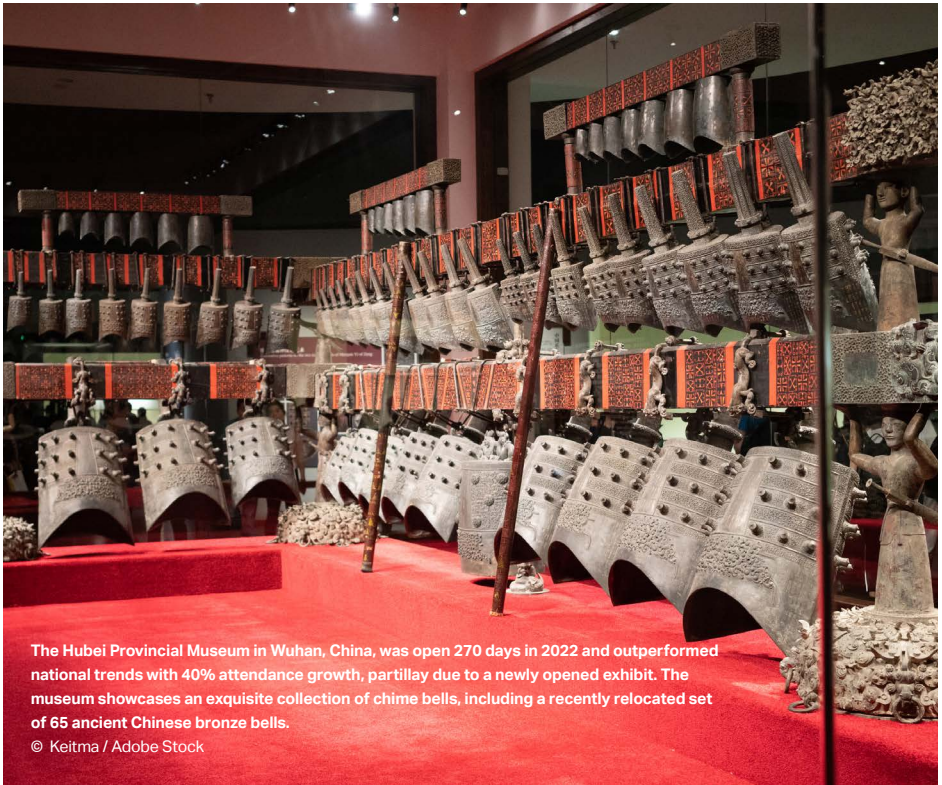
We should mention that if we were reranking the lists this year rather than tracking the recovery of the top 2019 museums, three museums in this region achieved visitation levels that would warrant their inclusion in the top 20. Berlin's new Humboldt Forum had 1.5 million visitors, the State Russian Museum in St. Petersburg received 2.65 million visitors, and the Acropolis Museum in Athens reported 1.45 million visitors in 2022.

APAC

As a region, APAC fared the worst in pandemic recovery for museums in 2022. Modest to strong increases in some countries were largely offset by major losses in China as well as places that rely on Chinese tourists. The top 20 list, when added together, is essentially flat from 2021 to 2022. Will that be the case going forward? China's reopening at the very end of 2022 removes one of the biggest hurdles for the region, though difficulties in obtaining visas and arranging travel in and out of China are likely to be problematic for the region in the short term.

The Acropolis Museum in Athens reported 1.45 million visitors in 2022, which would have placed it in our top 20 list for EMEA museums if we were re-ranking museums this year
© Lefteris Papoulakis / Adobe Stock





The Hubei Provincial Museum in Wuhan, China, was open 270 days in 2022 and outperformed national trends with 40% attendance growth, partially due to a newly opened exhibit. The museum showcases an exquisite collection of chime bells, including a recently relocated set of 65 ancient Chinese bronze bells.

© Keitma / Adobe Stock

South Korea was perhaps most successful in the region. The National Museum of Korea just about achieved its 2019 total attendance. The four branches of the National Museum of Modern and Contemporary Art also performed well, with the Seoul branch receiving 1.8 million visitors in 2022 (400,000 more than in 2019). Attendance was likely boosted by The Frieze Art Fair being held in Seoul for the first time.

Taiwan's recovery was varied. Still at only a fraction of 2019 attendance, most museums saw a modest increase of 10 to 60% over 2021, particularly those institutions that rely on international visitation for success, such as the National Palace Museum in Taipei. Exceptions include the National Museum of Marine Biology and Aquarium and National Museum of Natural Science,

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Museums are looking for new ways to engage their entire campuses, and outdoor events like food trucks, music festivals, or other adult- and family-driven events have been effective ways to gain visibility.

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both popular with families in the region, that have essentially recovered to pre-pandemic levels.

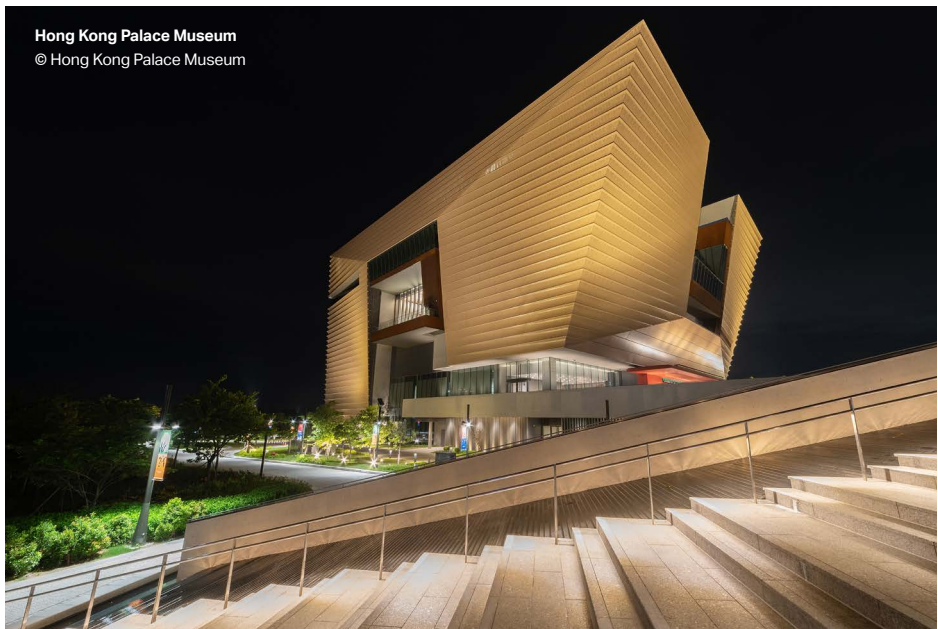
In Hong Kong, hopes and challenges coexist. Tourism has not recovered and faces strong headwinds as flights to Hong Kong were cut dramatically during the pandemic. Nevertheless, the M+ Museum in Hong Kong officially opened to the public in November 2021, and the Hong Kong Palace Museum opened in 2022. Although M+ was closed for nearly four months due to the pandemic, its attendance in 2022 reached an impressive 2.03 million.

China, which has the greatest number of museums on our top 20 list, was negatively impacted by the pandemic throughout 2022, with more lockdowns and restrictions than the previous year. This was particularly true in the largest cities of Beijing and Shanghai. As a result, most Chinese museums saw a drop of anywhere from 5 to 80% from 2021. Many institutions were required to check health codes and itineraries for visitors, in addition to enforcing facemasks and

temperature checks. There were exceptions to this. The Zhejiang Museum of Natural History in Hangzhou and the Hubei Provincial Museum in Wuhan either maintained or grew attendance, thanks to being in cities that were not as restrictive in terms of Covid control as well as to special exhibits. The Hubei Museum, for example, was open 270 days in 2022, which was higher than most cities in China.

North America

Similar to European institutions, some American museums faced restrictions in Q1 of 2022 that impacted their attendance figures. That, combined with soft international tourism, resulted in an average attendance that was 70% of 2019 levels (this number excludes the National Air and Space Museum, which was closed for a good portion of the year due to their expansion). The lack of school groups, which have not returned to museums completely, also played a role. All of the museums on our list posted a net gain over 2021, with



Hong Kong Palace Museum
© Hong Kong Palace Museum



most ranging from 50 to 200%. The National Museum of Natural History and the National Museum of American History both reported increases above 200%, at 297% and 216% respectively.

Many of the largest museums on our top 20 list are in global cities where international tourism typically accounts for a greater share of attendance than in regional museums. With US Covid testing restrictions eliminated for inbound travel, we would expect to see most museums continue to increase attendance in 2023, though many tourism agencies are predicting that visitor levels won't return to 2019 levels until 2024 or 2025.

Of note in the region, D.C. museums posted strong increases, but still not at pre-pandemic levels. The Smithsonian's National Air & Space Museum reopened in mid-October with eight new and renovated galleries in the west wing of its building in Washington, D.C. However, during most of the year it was inaccessible due to renovations.

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With US Covid testing restrictions eliminated for inbound travel, we would expect to see most museums continue to increase attendance in 2023, though many tourism agencies are predicting that visitor levels won't return to 2019 levels until 2024 or 2025.

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Denver Museum of Nature and Science's Mars Outpost, a custom space-themed, early childhood play area at Colorado Mills Mall. © Denver Museum of Nature and Science

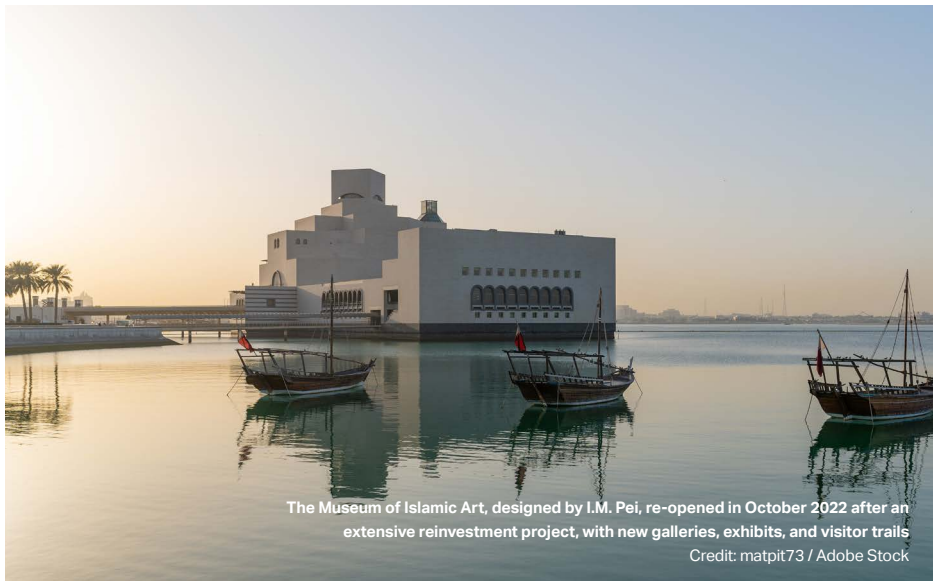
The Museum of Modern Art in New York City was the only museum to exceed 2019 figures, but this is somewhat misleading as they had a new 40,000 square foot expansion open in October 2019 and were closed for several months prior to opening due to construction. Other New York institutions were hampered by capacity restrictions during the first part of the year. The Museum of Science and Industry (MSI) in Chicago reached 82% of pre-pandemic attendance levels, in large part due to continued special exhibits (this year featured The Art of the Brick) and the arrival of the SpaceX Dragon spacecraft to MSI, which will be developed into a permanent exhibit in 2023. The Field Museum, also in Chicago, saw attendance grow nearly 70% between 2021 and 2022, in part due to the the popular Jurassic Oceans exhibit in 2022.

Finally, the Denver Museum of Nature and Science is a prime example of how museums are adapting to changing dynamics, bringing their offerings directly to the community. In 2022, the museum unveiled its second exhibit in a shopping center, Mars Outpost, at the Colorado Mills

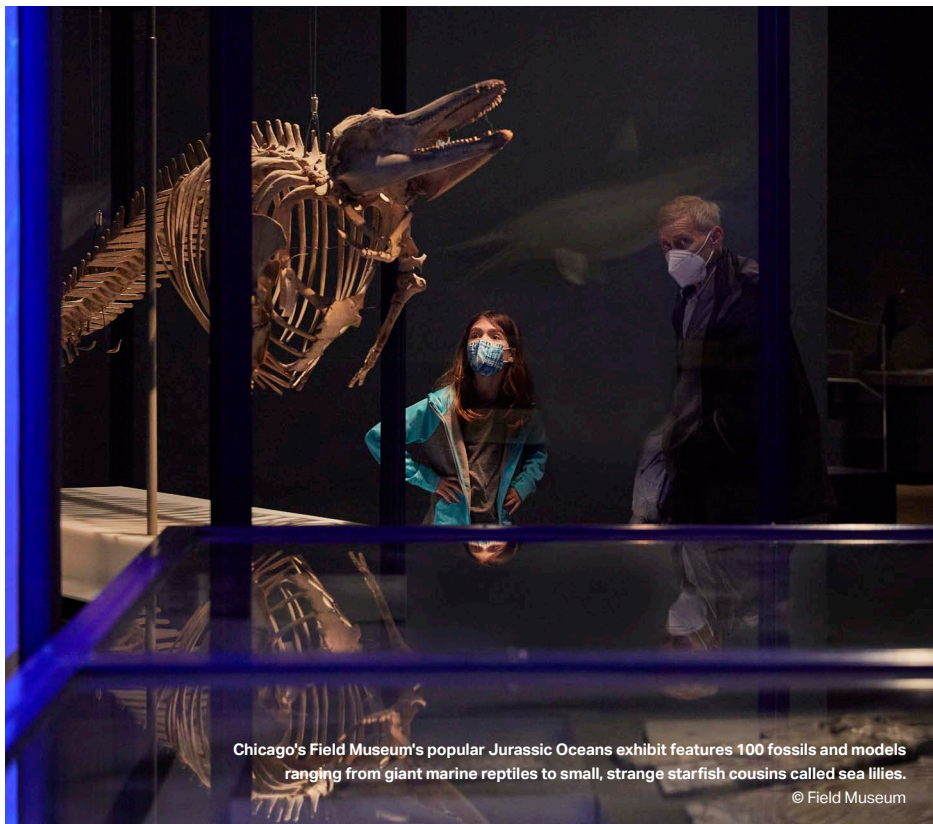
Mall. This initiative reflects a growing trend of museums engaging with audiences on their home turf, making knowledge and exploration more accessible to all.

New Museums in 2022

Finally, there were several new museums and expansion that opened in 2022. The Museum of Broadway in New York City, the Bob Dylan Center in Tulsa, Oklahoma, the National Museum of Norway in Oslo, and the Hong Kong Palace Museum in the West Kowloon Cultural District in Hong Kong are just a few examples of new openings. The Museum of Islamic Art in Doha, designed by I.M. Pei, reopened in October 2022 after an extensive reinvestment project, with new galleries, exhibits, and visitor trails. Looking ahead to 2023, after more than a decade of planning, the American Museum of Natural History just completed the \$465 million, 230,000 square foot Richard Gilder Center for Science, Education, and Innovation.



The Museum of Islamic Art, designed by I.M. Pei, re-opened in October 2022 after an extensive reinvestment project, with new galleries, exhibits, and visitor trails
Credit: matpit73 / Adobe Stock



Chicago's Field Museum's popular Jurassic Oceans exhibit features 100 fossils and models ranging from giant marine reptiles to small, strange starfish cousins called sea lillies.
© Field Museum

Top 20 Museums Worldwide

2019 RANK	MUSEUM LOCATION	% CHANGE 2021-2022	ATTENDANCE (in thousands)				FREE/PAID
			2022	2021	2020	2019	
1	LOUVRE, PARIS, FRANCE	173%	7,726	2,825	2,700	9,600	P
2	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	-31%	1,631	2,378	1,600	7,390	F
3	VATICAN MUSEUMS, VATICAN, VATICAN CITY	215%	5,081	1,613	1,300	6,883	P
4	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	64%	3,209	1,958	1,125	6,770	P
5	BRITISH MUSEUM, LONDON, U.K.	209%	4,097	1,327	1,275	6,208	F
6	TATE MODERN, LONDON, U.K.	236%	3,883	1,156	1,433	6,098	F
7	NATIONAL GALLERY, LONDON, U.K.	285%	2,727	709	1,197	6,011	F
8	NATURAL HISTORY MUSEUM, LONDON, U.K.	198%	4,655	1,564	1,197	5,424	F
9	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	n/a	n/a	n/a	n/a	5,000	P
10	STATE HERMITAGE, ST. PETERSBURG, RUSSIA	71%	2,813	1,649	969	4,957	P

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2019 RANK	MUSEUM LOCATION	% CHANGE 2021-2022	ATTENDANCE (in thousands)				FREE/PAID	
			2022	2021	2020	2019		
11	SHANGHAI SCIENCE AND TECHNOLOGY MUSEUM, SHANGHAI, CHINA	-79%	494	2,368	1,351	4,824	P	
12	REINA SOFÍA, MADRID, SPAIN	84%	3,063	1,643	1,248	4,426	F	
13	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, D.C., U.S.	297%	3,900	982	573	4,200	F	
14	NANJING MUSEUM, NANJING, CHINA	-21%	1,610	2,034	1,515	4,169	F	
15	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-6%	874	929	1,108	4,150	F	
16	NATIONAL GALLERY OF ART, WASHINGTON, D.C., U.S.	91%	3,256	1,705	730	4,074	F	
17	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	176%	2,370	858	872	3,921	P	
18	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	-39%	1,431	2,360	690	3,891	P	
19	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	149%	1,040	417	643	3,832	P	
20	MUSÉE D'ORSAY, PARIS, FRANCE	213%	3,270	1,044	867	3,652	F	
TOP 20 TOTAL ATTENDANCE 2022			94%	57,130	29,519	22,393	105,480	
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)							57%	

© 2023 TEA / AECOM

94%

Top 20 museums worldwide attendance change 2021–22

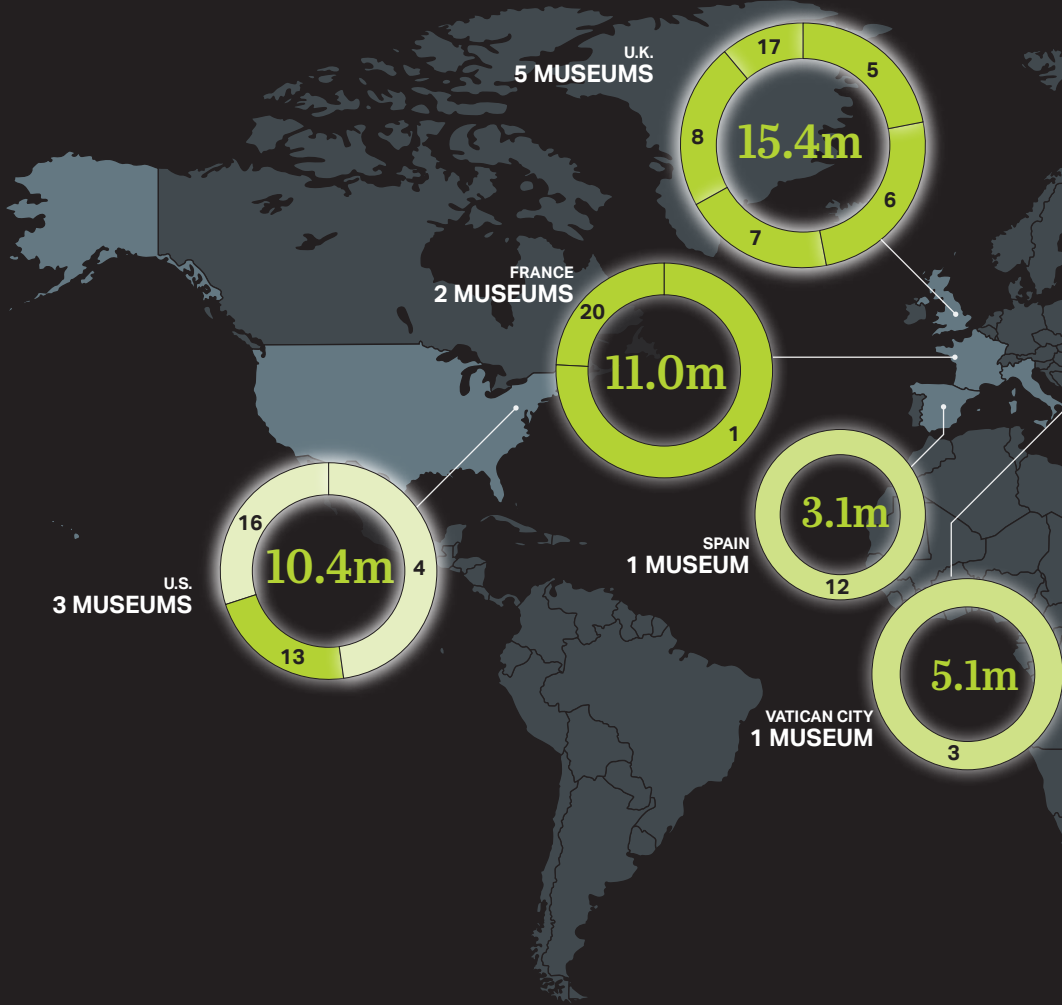
57,130m

Top 20 museums worldwide attendance 2022

29.5m

Top 20 museums worldwide attendance 2021

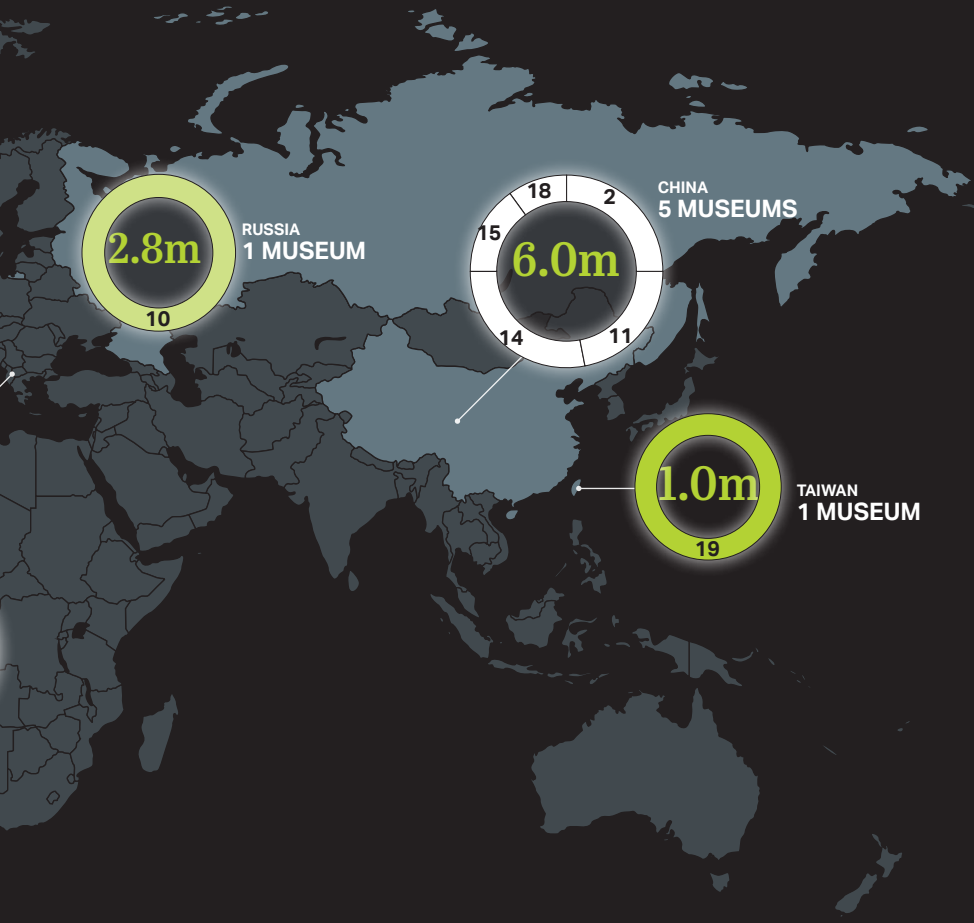
Top 20 Museums Worldwide



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.



88%

Top 20 museums worldwide attendance change 2021–2022

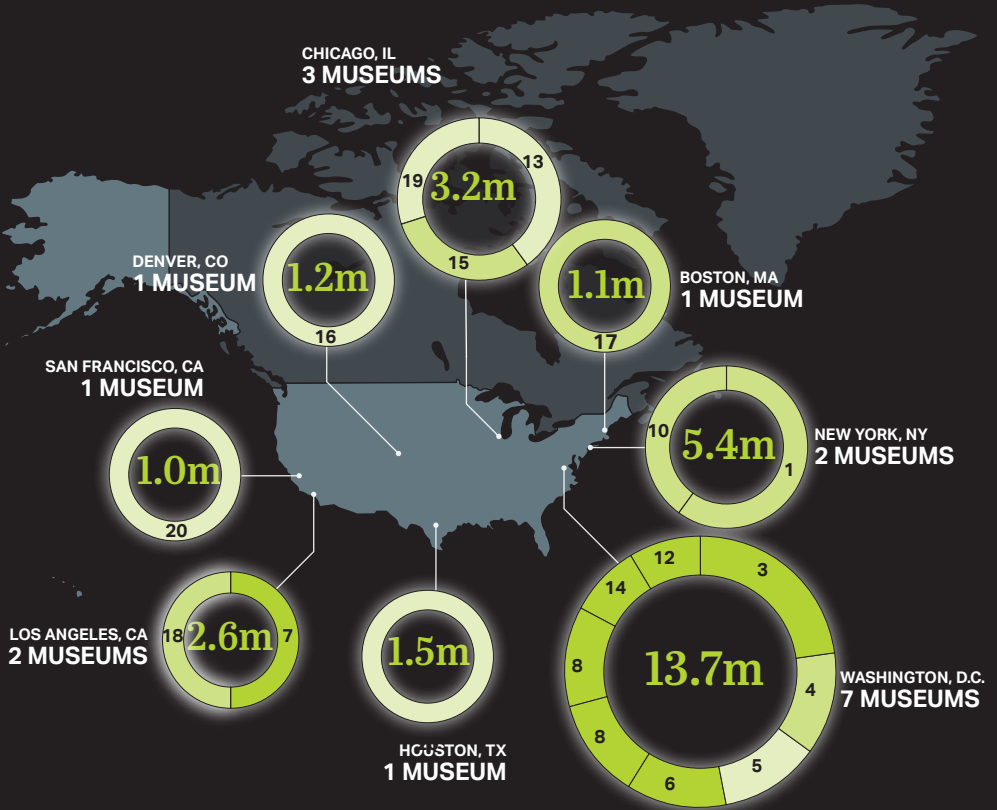
55.4m

Top 20 museums worldwide attendance 2022

29.5m

Top 20 museums worldwide attendance 2021

Top 20 Museums North America



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- > 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 2021-2022	ATTENDANCE (in thousands)				FREE/IPAID
			2022	2021	2020	2019	
1	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	64%	3,209	1,958	1,125	6,770	P
2	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	n/a	n/a	n/a	n/a	5,000	P
3	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC, U.S.	297%	3,900	982	573	4,200	F
4	NATIONAL GALLERY OF ART, WASHINGTON, DC, U.S.	91%	3,256	1,705	730	4,074	F
5	NATIONAL AIR AND SPACE MUSEUM, WASHINGTON, DC, U.S.	2%	419	411	267	3,200	F
6	NATIONAL MUSEUM OF AMERICAN HISTORY, WASHINGTON, DC, U.S.	216%	1,800	570	311	2,800	F
7	CALIFORNIA SCIENCE CENTER, LOS ANGELES, CA, U.S.	133%	1,694	726	271	2,200	P
8	NATIONAL MUSEUM OF AFRICAN AMERICAN HISTORY AND CULTURE, WASHINGTON, DC, U.S.	178%	1,093	393	368	2,000	F
	SMITHSONIAN AMERICAN ART MUSEUM (WITH THE RENWICK GALLERY), WASHINGTON DC, U.S.	162%	1,100	420	387	2,000	F
10	THE MUSEUM OF MODERN ART, NEW YORK, NY, U.S.	89%	2,190	1,161	706	1,992	P
11	HOUSTON MUSEUM OF NATURAL SCIENCE, HOUSTON, TX, U.S.	40%	1,520	1,086	n/a	1,974	F
12	NATIONAL PORTRAIT GALLERY, WASHINGTON, DC, U.S.	189%	954	330	321	1,700	F
13	THE ART INSTITUTE OF CHICAGO, CHICAGO, IL, U.S.	38%	1,037	700	375	1,666	P
14	U.S. HOLOCAUST MEMORIAL MUSEUM, WASHINGTON, DC, U.S.	164%	1,184	448	n/a	1,600	P
15	FIELD MUSEUM OF NATURAL HISTORY, CHICAGO, IL, U.S.	68%	1,018	605	316	1,494	P
16	DENVER MUSEUM OF NATURE & SCIENCE, DENVER, CO, U.S.	20%	1,151	959	991	1,487	P
17	MUSEUM OF SCIENCE, BOSTON, MA, U.S.	93%	1,123	583	345	1,458	P
18	THE J. PAUL GETTY CENTER, LOS ANGELES, CA, U.S.	80%	909	504	267	1,439	F
19	MUSEUM OF SCIENCE AND INDUSTRY, CHICAGO, IL, U.S.	45%	1,134	780	291	1,388	P
20	CALIFORNIA ACADEMY OF SCIENCES, SAN FRANCISCO, CA, U.S.	50%	966	646	240	1,321	P
TOP 20 TOTAL ATTENDANCE 2022		97%	29,657	13,433	7,884	49,763	
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						66%	

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97%

Top 20 museums North America attendance change 2021–22

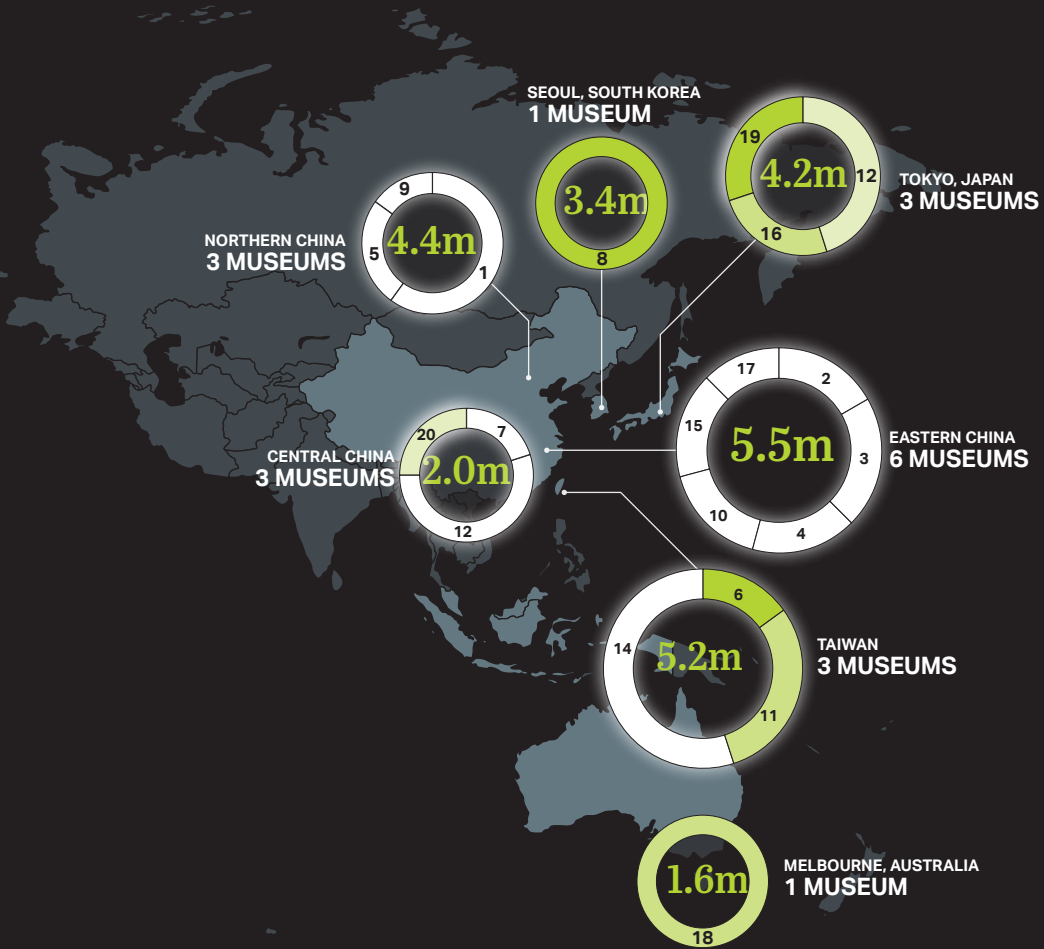
29.7m

Top 20 museums North America attendance 2022

13.4m

Top 20 museums North America attendance 2021

Top 20 Museums Asia-Pacific



2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 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 2021-2022	ATTENDANCE (in thousands)				FREE/PAID
			2022	2021	2020	2019	
1	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	-31%	1,631	2,378	1,600	7,390	F
2	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, SHANGHAI, CHINA	-79%	494	2,368	1,351	4,824	P
3	NANJING MUSEUM, NANJING, CHINA	-21%	1,610	2,034	1,515	4,169	F
4	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-6%	874	929	1,108	4,150	F
5	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	-39%	1,431	2,360	690	3,891	P
6	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	149%	1,040	417	643	3,832	P
7	XIAN MUSEUM, XIAN, CHINA	27%	401	315	348	3,420	F
8	NATIONAL MUSEUM OF KOREA, SEOUL, SOUTH KOREA	170%	3,411	1,263	774	3,354	F
9	TIANJIN NATURAL HISTORY MUSEUM, TIANJIN, CHINA	-17%	1,321	1,600	550	3,150	F
10	HUNAN MUSEUM, CHANGSHA, CHINA	-14%	1,221	1,421	1,130	3,140	F
11	NATIONAL TAIWAN SCIENCE EDUCATION CENTER, TAIPEI, TAIWAN	62%	1,879	1,158	1,082	3,000	P
12	SHANXI HISTORY MUSEUM, XIAN, CHINA	-54%	690	1,510	1,000	2,900	F
13	TOKYO METROPOLITAN ART MUSEUM, TOKYO, JAPAN	44%	1,510	1,049	510	2,874	P
14	NATIONAL MUSEUM OF NATURAL SCIENCE, TAICHUNG, TAIWAN	47%	2,300	1,566	2,263	2,650	P
15	SHANGHAI NATURAL HISTORY MUSEUM, SHANGHAI, CHINA	-75%	532	2,166	1,040	2,549	P
16	NATIONAL MUSEUM OF NATURE AND SCIENCE, TOKYO, JAPAN	69%	1,350	800	580	2,460	P
17	ZHEJIANG MUSEUM OF NATURAL HISTORY, HANGZHOU, CHINA	0%	738	740	600	2,443	P
18	NATIONAL GALLERY OF VICTORIA, MELBOURNE, AUSTRALIA	97%	1,580	802	637	2,433	F
19	TOKYO NATIONAL MUSEUM, TOKYO, JAPAN	127%	1,372	605	725	2,431	F
20	HUBEI PROVINCIAL MUSEUM, WUHAN, CHINA	37%	1,000	730	446	2,400	F
TOP 20 TOTAL ATTENDANCE 2022		1%	26,385	26,211	18,592	67,460	
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						39%	

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1%

Top 20 museums Asia-Pacific attendance change 2021-22

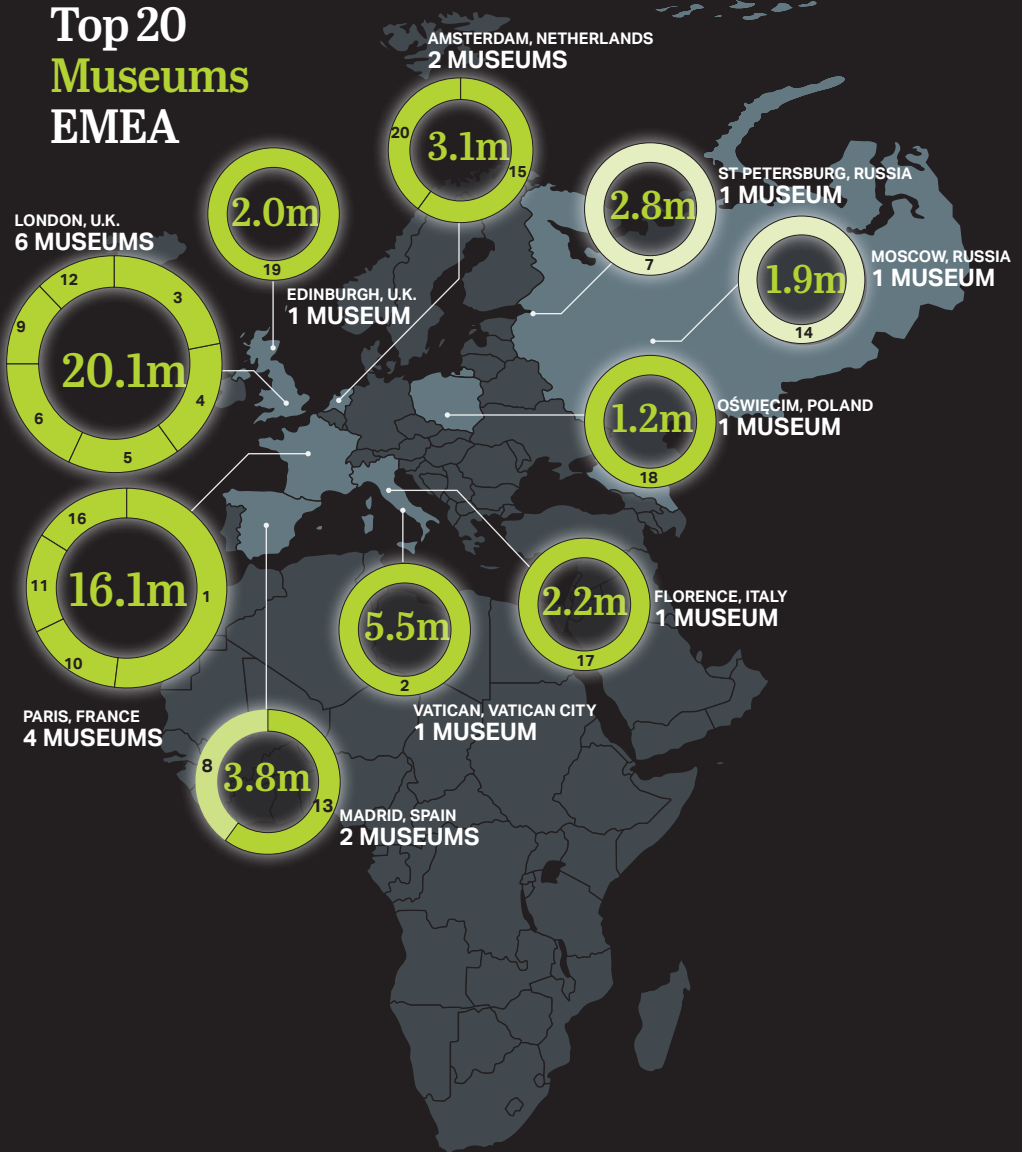
26.4m

Top 20 museums Asia-Pacific attendance 2022

26.2m

Top 20 museums Asia-Pacific attendance 2021

Top 20 Museums EMEA



2022 attendance trends were still impacted due to agency restrictions limiting travel, operating days, and capacities in the Covid-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2022 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 2021-2022	ATTENDANCE (in thousands)				FREE/PAID
			2022	2021	2020	2019	
1	LOUVRE, PARIS, FRANCE	173%	7,726	2,825	2,700	9,600	P
2	VATICAN MUSEUMS, VATICAN, VATICAN CITY	215%	5,081	1,613	1,300	6,883	P
3	BRITISH MUSEUM, LONDON, U.K.	209%	4,097	1,327	1,275	6,208	F
4	TATE MODERN, LONDON, U.K.	236%	3,883	1,156	1,433	6,098	F
5	NATIONAL GALLERY, LONDON, U.K.	285%	2,727	709	1,197	6,011	F
6	NATURAL HISTORY MUSEUM, LONDON, U.K.	198%	4,655	1,564	1,197	5,424	F
7	STATE HERMITAGE, ST PETERSBURG, RUSSIA	71%	2,813	1,649	969	4,957	P
8	REINA SOFÍA, MADRID, SPAIN	86%	3,063	1,643	1,248	4,426	F
9	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	176%	2,370	858	872	3,921	F
10	MUSÉE D'ORSAY, PARIS, FRANCE	213%	3,270	1,044	867	3,652	F
11	CENTRE POMPIDOU, PARIS, FRANCE	101%	3,010	1,501	913	3,270	P
12	SCIENCE MUSEUM (SOUTH KENSINGTON), LONDON, U.K.	262%	2,335	646	862	3,254	P
13	MUSEO NACIONAL DEL PRADO, MADRID, SPAIN	118%	2,457	1,127	852	3,203	P
14	STATE TRETYAKOV GALLERY, MOSCOW, RUSSIA	21%	1,910	1,581	894	2,836	P
15	RIJKSMUSEUM, AMSTERDAM, NETHERLANDS	183%	1,766	625	675	2,700	P
16	CITE DES SCIENCES ET DE L'INDUSTRIE, PARIS, FRANCE	114%	2,101	984	793	2,370	P
17	GALLERIA DEGLI UFFIZI, FLORENCE, ITALY	129%	2,223	970	659	2,362	P
18	AUSCHWITZ-BIRKENAU MUSEUM, OŚWIĘCIM, POLAND	110%	1,184	563	502	2,300	P
19	NATIONAL MUSEUM OF SCOTLAND, EDINBURGH, U.K.	199%	1,974	661	444	2,210	F
20	VAN GOGH MUSEUM, AMSTERDAM, NETHERLANDS	267%	1,346	366	517	2,100	P
TOP 20 TOTAL ATTENDANCE 2022		156%	59,991	23,412	20,169	83,785	
TOP 20 TOTAL ATTENDANCE AS % OF 2019 (PRE-PANDEMIC)						72%	

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148%

Top 20 museums EMEA attendance change 2021-22

60.0m

Top 20 museums EMEA attendance 2022

23.4m

Top 20 museums EMEA attendance 2021

About the Study

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

This is the seventeenth annual Theme Index and Museum Index collaboration between the Themed Entertainment Association (TEA) and AECOM, although the study itself has been in existence for much longer. The report has evolved over the years, starting as just a report on major U.S. theme parks, with additional regions (EMEA, Asia, Latin America) and attraction types (water parks, museums) added over time. The report represents a significant body of international research and annual tracking.

Inclusion in the annual Theme Index and Museum Index is now seen as a benchmark of success among operators, parks, and museums. Every year AECOM and TEA hear from parks and museums desiring to share their attendance increases and earn a place on the list. Those who believe their properties should be included in the report are encouraged to contact the AECOM office in their region, after studying the criteria for consideration given below. The more feedback and information we receive, the more accurate this report will become.

AECOM obtains the figures used to create the TEA/AECOM Theme Index and Museum Index through a variety of sources, including statistics furnished directly by the operators, historical numbers, financial reports, the investment banking community, local tourism organizations, and professional estimates where necessary.

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

For a theme park or water park to be included in the report, at a minimum the property must be gated (entry ticket required) and the park generally must be focused on the visitor experience. To be included in the top theme park groups list, an operator must have theme parks in its portfolio in which it has controlling ownership or that are branded by the operator (i.e., licensed).

Due to differences in reporting across operators and regions, there is some variation in the time periods for which figures are reported. Unless otherwise noted, figures for North America and Europe are calendar year figures, while most figures for Asia-Pacific are fiscal year figures. In Asia-Pacific, for those parks/museums with a fiscal year ending from June 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.



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 second 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.

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 2020-2022 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 2022 version of the report; AECOM has reported 2020 and 2021 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 2022 attendance for the top 20 museums from 2019.
- 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.

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

The two operators that most readily come to mind here are Merlin Entertainments Group and Parques Reunidos, both of which do make the Top 10 Theme Park Groups Worldwide list. In the case of Merlin Entertainments Group, they are the second most attended operator globally with attendance of 67.0 million in 2019, around one-third of which occurred at larger parks, with most of these located in the EMEA region (e.g., LEGOLAND Windsor, LEGOLAND Billund, Alton Towers, etc.). However, about two-thirds of Merlin's attendance occurs in mid- and small-size attractions, particularly at "midway" attractions, most of which are situated in highly trafficked locations in well-known locations, particularly top tourist destinations, with highly recognized individual brands (e.g., Madame Tussauds, SeaLife, the Dungeons, etc.). Similarly, with 20.9 million visitors in 2019, Parques Reunidos was the tenth most attended operator globally, with a strategy of focusing largely on a wide variety of attraction types, including amusement parks, zoos, aquariums, and IECs, primarily located in the EMEA region, but with a growing portfolio in North America (via its subsidiary Palace Entertainment). Clearly both Merlin Entertainments and Parques Reunidos have developed effective strategies to attract large numbers of visitors overall to their respective attraction portfolios, but a combination of factors such as their location, focus, and scale, inhibits most of their properties from reaching levels for inclusion in the Theme Index.

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 advisory, 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 and digital expertise, 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 \$13.1 billion in fiscal year 2022.

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

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

[**aecom.com/theme-index**](http://aecom.com/theme-index)

[**teaconnect.org/tea-theme--museum-index.html**](http://teaconnect.org/tea-theme--museum-index.html)