

A nighttime photograph of a large, illuminated stone castle or fortress with a crenellated roof. In the foreground, a large, multi-tiered fountain with numerous vertical jets of water is lit up. A large crowd of people in various costumes is gathered in front of the fountain, many with their arms raised. The sky is dark with several bright fireworks exploding. The overall scene is festive and celebratory.

**THEME
INDEX
MUSEUM INDEX 2020**

**Global
Attractions
Attendance
Report**

AECOM

TEA THEMED
ENTERTAINMENT
ASSOCIATION

Cover image:

Puy du Fou España in Toledo, Spain features four daytime shows, three period villages and a night show. The newly opened park builds on the success of the operator's original Puy du Fou park in France. Photo courtesy Puy du Fou.

Credits

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Editor: Judith Rubin

Producer: Linda Cheu

Lead Designers: Miguel Nonato, Mel Patrick Kasingsing

Publication team: Humberto Castro, Beth Chang, Linda Cheu, Lucia Fischer, Marina Hoffman, Doris Li, Jodie Lock, Jason Marshall, Miguel Nonato, Michael Posso, John Robinett, Judith Rubin, Chris Yoshii

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Contacts

For further information about AECOM:

John Robinett

Senior Vice President – Economics
john.robinett@aecom.com
T +1 213 593 8785

Abe Chorbajian, AIA NCARB, LEED AP

Senior Vice President/Lead – Global Leisure
abe.chorbajian@aecom.com
T +1 213 593 8399

Marina Hoffman

Senior Analyst – Economics, Americas
marina.hoffman@aecom.com
T +1 203 969 5764

Linda Cheu

Vice President – Economics, Americas
linda.cheu@aecom.com
T +1 415 955 2928

Chris Yoshii

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

Beth Chang

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

Jodie Lock

Associate Director – Economics, Asia-Pacific and EMEA
jodie.lock@aecom.com
T +852 3922 9000

aecom.com/economics

For information about TEA (Themed Entertainment Association):

Judith Rubin

Theme Index editor and press contact
judy@judithrubinetc.com
T +1 314 853 5210

Lindsey Nelson

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

TEAconnect.org



THEME INDEX MUSEUM 2020 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

Continuity and hope

The year 2020 is one that we'd probably all prefer to forget. While hesitant to report on the woes of our industry during the pandemic, we have abided by our general principle that transparent documentation of our industry is for the benefit of all. And it's not all bad news. Our industry has persevered through this disruption with some innovative products and services emerging in multiple sectors. We have also seen a positive comeback in 2021, with pent-up demand fueling many parks, albeit still at reduced capacity for some.

Global attraction attendance fell from 50% to 90% in 2020 depending on the extent of the pandemic and the type of parks in various regions - one of the steepest annual drops the industry has ever faced. That decline came on the heels of one of the strongest years: 2019 attendance numbers were an economic peak for the industry, the best in five decades according to the performance of the top global operators that we track. (See last year's report.)



John Robinett

Senior Vice President,
Economics





Tivoli Gardens in Copenhagen, Denmark put on an American-style 4th of July celebration in 2021 complete with burgers, classic cars and fireworks. Founded in 1843, Tivoli is one of the oldest amusement parks in the world and was honored with the Thea Classic Award.
© Tivoli Gardens

In the Americas, many full-season parks had several operating months in early 2020 before being mostly shut down in March for anywhere from several months to the remainder of the year. Overall attendance drops generally ranged from 70%-80%. China was about three months ahead of this schedule and had milder losses of 50-70%. EMEA also had more modest losses typically from 60% to 65%. The Americas, with many major destination parks dependent on tourism, had this component of attendance largely eliminated. Notable exceptions to these regional numbers were China's OCT parks, which reported an average decline of only 14%, and Fantawild parks, which dropped an average of 20%. Both of these Chinese operators rely largely on resident markets. And similarly, in Europe, Efteling Park in the Netherlands, which also is oriented towards local guests, and was hit by COVID-19 later in the season, declined by only 45%.

Park closures as well as the loss of international and domestic tourists varied from country to country creating a patchwork

of performance worldwide in 2020. Accordingly, 2020's attendance is largely a function of regulatory agency restrictions limiting parks' operating days and capacities and not park popularity and management. Therefore, we have decided to keep our 2019 rankings in place for our 2020 report. This will be re-ranked in 2021 once global health conditions stabilize.

83.3m

Top 25 theme parks worldwide attendance 2020

253.7m

Top 25 theme parks worldwide attendance 2019





SeaWorld will open Sesame Place San Diego in 2022.
© SeaWorld Parks & Entertainment

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2020’s attendance is largely a function of regulatory agency restrictions limiting parks’ operating days and capacities and not park popularity and management.

The cycle of recovery

It is not reasonable to expect recovery to equal an instant return to record 2019 numbers; a more realistic expectation in the short term would be to return to a level comparable to an average of the recent years prior to COVID.

Because the attractions industry model is dependent on bringing people together in groups, and relying to some extent on tourists, it was especially vulnerable to suffer economic harm from COVID. The heartening news is that our industry has faced downturns before and recovered, with the most recent example being the Great Recession of 2007-2009. If you recall, during this crisis the tourist-based parks were hurt more than the resident-based parks. Our current situation is, not surprisingly, similar.



There is an historic model for the cycle of downturn, bounce-back and recovery that has been observed in past tourism and attraction markets that can be applied to the COVID-19 pandemic (assuming, of course, that all other things remain equal and the Pandemic is generally contained). Our research shows that the pattern applies whether the catalyst is terrorism, civil unrest, economic decline or pandemic. The cycle shows a steep drop-off in the initial year, followed by a three-year recovery curve. Applying this cycle to the current pandemic, subsequent to the declines of 2020 we can expect 2021 to manifest as a bounce-back year. The following year, 2022, would begin to usher in real recovery - it could be expected to be a full operating year for everyone, but still limited in ways. In 2023, guest expectations would rise - they would start looking for new attractions - and operators should plan and budget for reinvestment accordingly. And indeed many have, with a number of new parks, rides, and specialty attractions either opening during COVID or in the near future. Details on this are in the body of our report.

Innovation and demand

It is difficult to pinpoint which changes will stay and which will vanish in recovery, but there are some trends to observe.

Virtual gatherings and programs quickly became one of the most important tools of continuity and communication during pandemic shutdowns. At this stage, participation in virtual events has dropped from those early months of the crisis. People have digital burnout and want to go back to in-person experiences where and when they can, for business and leisure. But virtual events and online meetings are not disappearing any time soon. COVID-19 closed offices as well as theme parks, and many will continue to work remotely even after recovery, though some will adopt flex schedules. There will still be online meetings. This will feed the continuing demand of the public to get out and have real experiences, which includes theme parks and attractions. The change of the

nature of work will likely create new demand for the leisure products of our industry.

Another prevalent trend was the use of technology to adapt operations to new conditions and create efficiencies for the future. The advancement of electronic ticketing being a good example. The use of more advanced ticketing and reservations software enabled parks to better serve customers directly rather than relying on third party bookings, and the incorporation of devise, artificial intelligence, and facial recognition driven applications, has provided for handsfree admissions, purchasing, and interactives. All of these, along with virtual queueing, and other enterprise software programs have allowed for rich data collection which can improve everything from ride maintenance to the personalization of guest experiences.

A final trend that has continued this year is the planning, development, and rollout of smaller immersive experiences using

new media technologies. Examples include the new units being opened by Meow Wolf, Illuminarium, teamLab and several others.

Our industry has a fundamental product that delivers family together time, nostalgia, and escape. The demand will always be there, and our industry will be there to provide for it. We are already seeing abundant proof of this in the pent-up demand surge reported to us by operators in the course of researching this report. As soon as they were able to reopen, guests came flooding back. This points toward a positive and improved industry of the future.

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The change of the nature of work will likely create new demand for the leisure products of our industry.



Top 25 Amusement/Theme Parks Worldwide

2019 RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2020	ATTENDANCE 2019
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	-66.9%	6,941,000	20,963,000
2	DISNEYLAND PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	-80.3%	3,674,000	18,666,000
3	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	-76.8%	4,160,000	17,910,000
4	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	-76.8%	3,400,000	14,650,000
5	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	-66.2%	4,901,000	14,500,000
6	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	-70.0%	4,166,000	13,888,000
7	EPCOT AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	-67.5%	4,044,000	12,444,000
8	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	-59.1%	4,797,000	11,736,000
9	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	-68.0%	3,675,000	11,483,000
10	SHANGHAI DISNEYLAND AT SHANGHAI DISNEY RESORT, SHANGHAI, CHINA	-50.9%	5,500,000	11,210,000
11	UNIVERSAL STUDIOS FLORIDA AT UNIVERSAL ORLANDO, FL, U.S.	-62.5%	4,096,000	10,922,000
12	UNIVERSAL'S ISLANDS OF ADVENTURE AT UNIVERSAL ORLANDO, FL, U.S.	-61.4%	4,005,000	10,375,000

2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

2019 RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2020	ATTENDANCE 2019
13	DISNEYLAND CALIFORNIA ADVENTURE PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	-80.5%	1,919,000	9,861,000
14	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-73.1%	2,620,000	9,745,000
15	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	-85.8%	1,299,000	9,147,000
16	EVERLAND, GYEONGGI-DO, SOUTH KOREA	-58.2%	2,760,000	6,606,000
17	LOTTE WORLD, SEOUL, SOUTH KOREA	-73.8%	1,560,000	5,953,000
18	NAGASHIMA SPA LAND, KUWANA, JAPAN	-59.7%	2,400,000	5,950,000
19	EUROPA-PARK, RUST, GERMANY	-56.5%	2,500,000	5,750,000
20	OCEAN PARK, HONG KONG SAR	-61.4%	2,200,000	5,700,000
21	HONG KONG DISNEYLAND, HONG KONG SAR	-70.1%	1,700,000	5,695,000
22	DE EFTELING, EFTELING THEME PARK RESORT, KAATSHEUVEL, NETHERLANDS	-44.9%	2,900,000	5,260,000
23	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-73.1%	1,410,000	5,245,000
24	OCT HAPPY VALLEY, BEIJING, CHINA	-23.4%	3,950,000	5,160,000
25	CHIMELONG PARADISE, GUANGZHOU, CHINA	-45.3%	2,681,000	4,905,000
TOP 25 TOTAL ATTENDANCE 2020			83,258,000	253,724,000
TOP 25 ATTENDANCE CHANGE 2019-20			-67.2%	83,258,000 253,724,000

© 2020 TEA / AECOM

-67.2%

Top 25 amusement/theme parks worldwide attendance change 2019-20

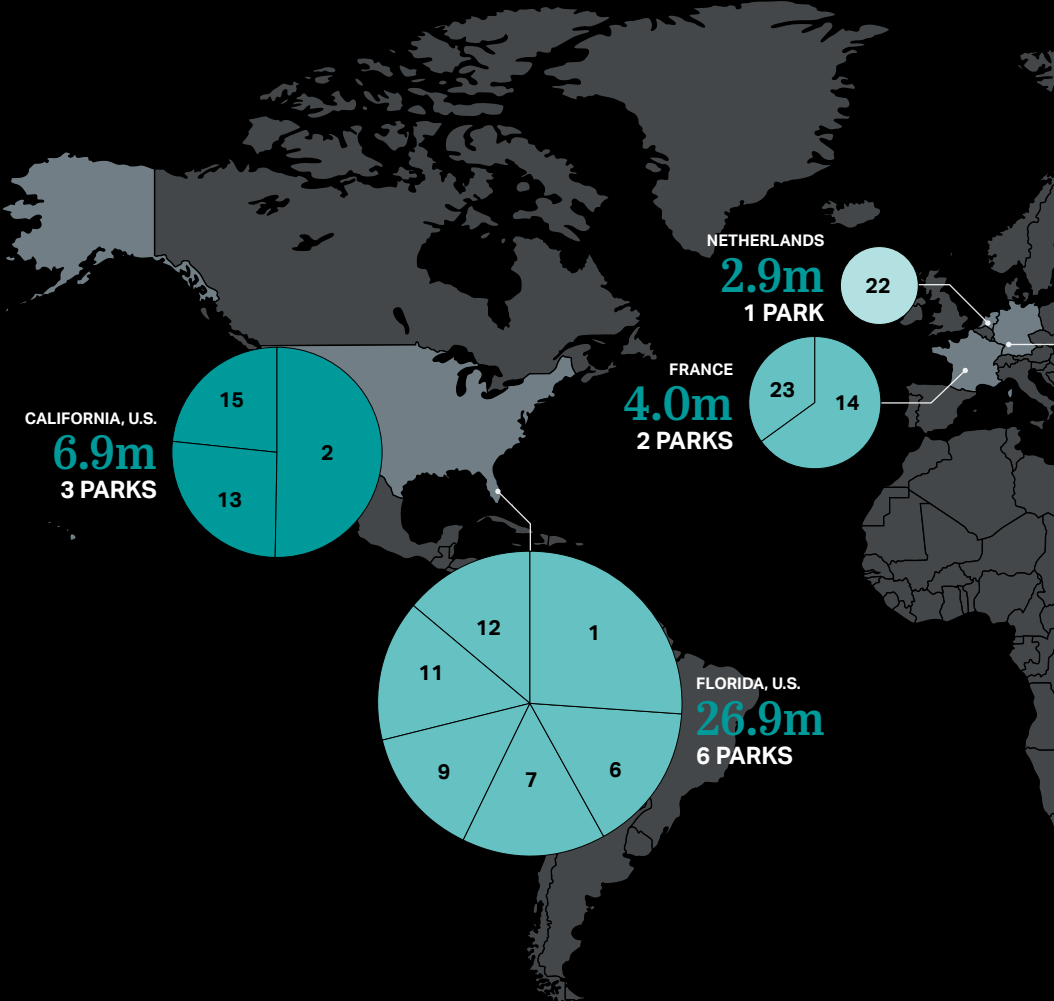
83.3m

Top 25 amusement/theme parks worldwide attendance 2020

253.7m

Top 25 amusement/theme parks worldwide attendance 2019

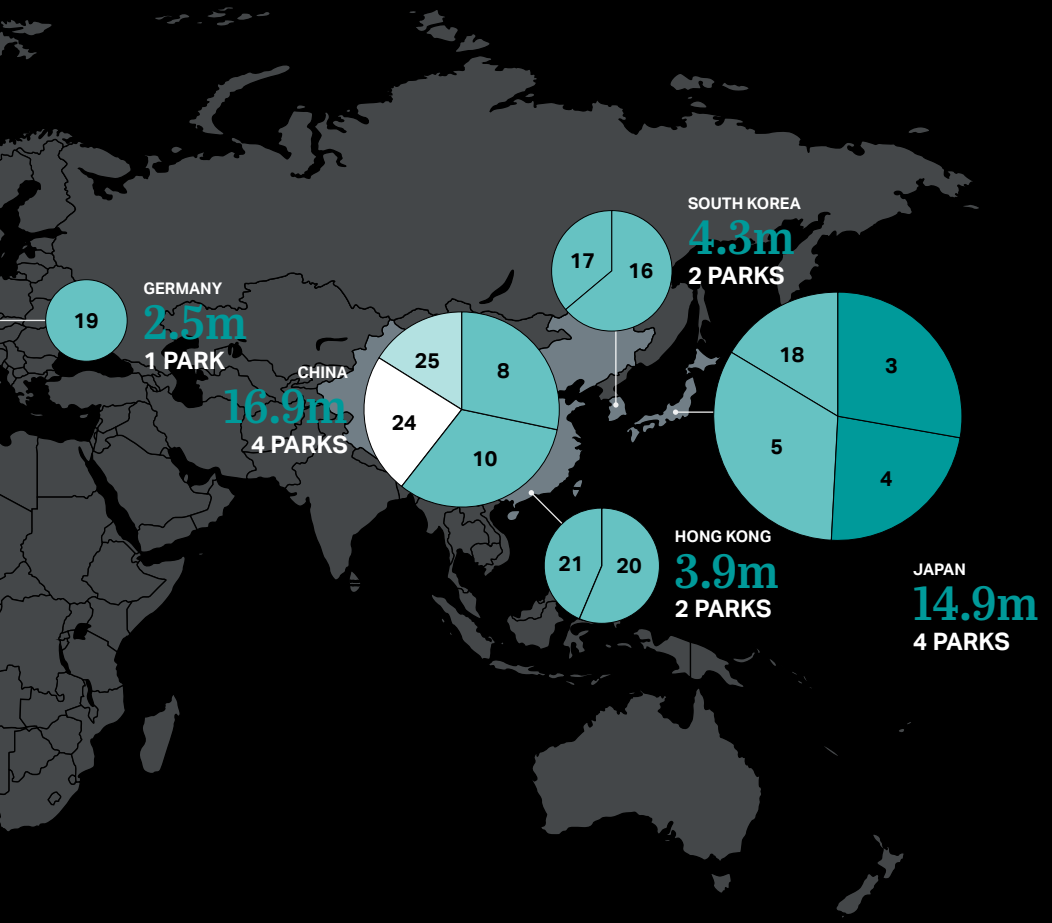
Top 25 Amusement/Theme Parks Worldwide



Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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.



-67.2%

Top 25 amusement/theme parks worldwide attendance change 2019-20

83.3m

Top 25 amusement/theme parks worldwide attendance 2020

253.7m

Top 25 amusement/theme parks worldwide attendance 2019

The Americas

A disturbance in the force

Theme parks, amusement parks and water parks everywhere in the world struggled in 2020. Due to the COVID-19 pandemic, they were closed for part if not all of their operating seasons.

This report studies the top-attended parks, and most of those major players normally operate year-round. In the US, most of these attractions were open Jan 1, 2020, but shut down mid-March. The top 20 North American theme parks saw a 72% drop in attendance numbers.

Closures and re-openings were state regulated. Florida parks were generally shut for four months and began re-opening in early to mid-summer 2020, with capacity limits. In California, most major parks were shut down for most or all of 2020, with a few exceptions noted below.

The pain rippled through the industry as well as the fan base. Let's face it, there is a real disturbance in the force if Disneyland is closed!

At this writing in September 2021, most parks in the Americas have been open for the season and doing well. Attendance caps have largely been eliminated, with the largest operators reporting some days that measure up to 2019 levels, economically speaking. The TEA/AECOM Theme Index being a calendar-year study, next year's report will present the 2021 numbers.

The calendar has been a factor in terms of when a region was hardest hit by infection relative to operating season. In the Americas, water parks suffered more than theme parks for this reason, and parks with limited seasons suffered more than those designed to operate year-round. The 2019 top ranked 20 North American theme parks saw a 72% drop in attendance numbers from 2019 to 2020.



Marina Hoffman

Senior Analyst,
Economics





Bouncing back

As soon as parks could open back up, they had streams of guests. Some operators expressed amazement at how many people showed up. It was a testament to how much people love our industry's product. Operators adapted in ways to prioritize safety and reassure patrons while seeking to provide the best possible guest experience - and were able to recoup some of their lockdown losses.

It was a plus that theme parks and water parks offer a mostly outdoor experience and outdoor activities have been favored as less risky for contagion. (Museums and other indoor venues suffered much more, as reflected in the Museum Index section of this report.)

Broadly speaking, for those that were allowed to open, North American theme parks operated at 25% capacity through summer 2020. Capacity was allowed to increase in the fall to 35%, and some properties were able to accommodate 50%. Within those estimates there are finer shadings. The actual attendance caps varied from state to state and province to province. And some municipalities instituted attendance caps stronger than those imposed by their states. Actual demand was probably higher than what these caps allowed, and had greater capacity been allowed, attendance would have been higher.

In Latin America, theme park and water park operators were hit hard by the effects of the pandemic and have had less opportunity to recover due to less vaccine availability than the US. Our research pointed to an overall attendance decline of 71% for the theme parks and a decline of 61% for the water parks. Parks in Latin

America were open at the beginning of 2020 and closed mid-March, but did not reopen until mid-October at a preliminary reduced capacity of 35%.

Staffing has been an issue, particularly for water parks. Under the circumstances, operators have been consolidating staff and resources where they could. Whether open or closed, a park has fixed costs including labor, real estate tax, insurance, administration, executive salaries and utilities, regardless of whether revenue is coming in. Reducing staff may save as much as 50% of fixed costs, but not 100%. This is most challenging for smaller parks, many of which are likely to become acquisition targets due to the pandemic.

Market changes

Shifts in real estate, retail and tourism markets affect the picture in various ways that will play out in future attraction development. As consumer buying patterns have shifted to online shopping, there are sizeable retail assets available, such as shopping mall space, that can be utilized for entertainment. And as many middle-income wage-earners, now working from home, have been relocating away from large urban centers to more affordable places, secondary markets have become high-growth markets able to sustain new leisure development.

Regionalization is further accentuated by the lack of international tourism due to travel bans and basic caution. Some North American parks, particularly the top-attended major operators that are the focus of this report, normally rely heavily on international visitors and welcome significant numbers of guests from the UK, Germany, China, and Japan. They are having to shift focus. Disney localized their openings working with local and national

health authorities and their own internal doctors and in many cases opened with lower capacities than required.

Domestic tourism has been making a very strong comeback, which is good news for the smaller and more regional parks catering to mostly domestic visitor bases. Hotel occupancy, Airbnb, and auto vehicle counts are all up by large margins, especially in destination areas a short distance from major cities. We're hearing reports of some of the highest such numbers ever seen. National parks and campgrounds are doing great business. The domestic tourism boom should continue and be a lifeline as we wait for borders to reopen.

For their part, airlines have been seeing leisure but not business travelers, meaning airline revenues are down although planes and airports are full.

44.3m

Top 20 theme parks in
North America attendance 2020

159.1m

Top 20 theme parks in
North America attendance 2020





Theme parks

The spirit of recovery is evident in how our theme park and water park operators have adapted and innovated to continue doing what they do best - welcoming and entertaining the public, providing a unique environment in which to gather with friends and family, and making that environment as safe a space as possible.

Disney, the world's top theme park operator, conceived and implemented some new, innovative ways to design attractions and entertainment and to operate its parks, and many of these changes will continue in the future. Disney is continuing to invest in the guest experience. While some construction projects paused out of necessity, planning, investment, and development are up and running again.

In 2020, all Disney World theme parks closed to guests by March 16.

Disney Springs closed all the Disney-owned shops and restaurants on March 17. A few days later, on March 20, Disney Resort hotels were closed. A phased reopening of Disney Springs began on May 20. Magic Kingdom and Animal Kingdom reopened July 11; EPCOT and Disney's Hollywood Studios reopened July 15. In Anaheim, CA, Disneyland Resort reopened April 30, 2021, to California residents only due to regulatory and health agencies requirements. The residency requirement was dropped June 15, 2021. The new Avengers Campus opened June 4, 2021, at Disneyland, featuring encounters with Marvel characters and villains and an interactive, Spider-Man ride.

NBC Universal kept its parks moving forward with development and expansion plans. Universal Studios Hollywood reopened with two major additions - Secret Life of Pets: Off the Leash dark ride, which was delayed from 2020, and Jurassic World™ - The Ride, which had opened in 2019, but added a new,

full-sized animatronic Indominus Rex (it fights the T-Rex in the final scene) for the park's reopening. The Bourne Stuntacular premiered June 30, 2020, at Universal Orlando, 25 days after the park reopened; the elaborate new stunt show was recently honored with a Thea Award. In Orlando, the new Jurassic World Velocicoaster that opened June 10, 2021 has been well received. After a 2020 pause, work has resumed on Epic Universe, which will be the fourth theme park at Universal Orlando. (Meanwhile, on the other side of the globe in China, Universal Beijing Resort opened in September 2021.)

Two California parks having a significant animal attraction component were

fortunate to be able to reopen in 2020 under the state's zoo/aquarium guidelines, making the most of a survival tactic available to them while other parks were obliged to remain shut. Six Flags Discovery Kingdom (Vallejo) reopened on July 2 and SeaWorld San Diego on August 28.

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NBC Universal kept its parks moving forward with development and expansion plans.





But there were other ways guests could still visit some of the parks prior to that. Although the State of California closed down typical operations at theme parks, both Discovery Kingdom and Magic Mountain converted their Holiday in the Park experiences to drive-through attractions. Discovery Kingdom went on to offer drive-throughs that featured special scenes around the different holiday celebrations at the park, such as 4th of July and Fright Nights. Magic Mountain offered one through a custom car show coordinated by West Coast Customs. SeaWorld San Diego also offered a drive-through Christmas experience, starring Sesame Street characters.

Cedar Fair operators also displayed ingenuity and hospitality. Knott's Berry Farm doubled down on its popular tradition of hosting festivals to enable guests to gather on the park grounds for food, beverages and merchandise even while the park's rides were shut down. These included Taste of Calico in Ghost Town, subsequently expanded throughout

the park as Taste of Knott's; and in the Halloween season, in lieu of the annual classic Knott's Scary Farm, the park hosted Taste of Fall-O-Ween, finishing out 2020 with Taste of Merry Farm and then in March 2021, the Taste of Boysenberry Festival. All these festivals were limited-ticket events that took place prior to the park's being able to fully reopen.

When it came time to reopen at last in spring 2021, both Knott's and Cedar Point held anniversary celebrations and opened new rides. Knott's celebrated its centennial and premiered the new Knott's Berry Tales: Return to the Fair dark ride. In Sandusky, Ohio, Cedar Point opened the new Snake River Expedition riverboat attraction and marked 150 years of thrills.

Herschend Entertainment was also visible and active. Dollywood reopened on June 17, 2020; Silver Dollar City on June 15 and the following month premiered Mystic

River Falls, its new, \$23 million rapids ride. Herschend also embarked on new acquisitions, purchasing the Kentucky Kingdom park and the Vancouver Aquarium in spring 2021.

On a general note, most regional chains extended their 2020 annual passes and memberships an extra year for no additional fee to keep locals engaged. Combined with travel slowdowns, this meant that a great many of the returning guests were existing passholders. This is deep discounting but from an operational standpoint the loss in ticketing revenue can be offset by per caps spending and the value in goodwill.

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Operators displayed ingenuity and hospitality in 2020, hosting festivals and drive-through tours even while rides were closed, extending annual passes and in a few cases, operating under zoo and aquarium guidelines.

**Knott's Scary Farm Halloween festival
at Knott's Berry Farm, Buena Park, CA**
© Knott's Berry Farm



Water parks

Water parks tend to operate on a seasonal schedule. In the US, they usually open around May for the Memorial Day holiday, and close in September. By June 2020, with the pandemic in full swing, US water parks were obliged to operate at reduced capacities. They have reportedly done much better in 2021, seeing a flurry of pent-up demand, though still at reduced capacity.

Water parks in most US states were following CDC guidelines, which were devised with the assistance of the World Waterpark Association - generally for masks to be worn everywhere except in the water. The role played by WWA was an excellent instance of an industry association stepping up to work with government to devise achievable operating plans in a pandemic.

Maintaining staffing levels has been especially difficult for water parks in the pandemic. In a smart move to consolidate staff and resources particularly while operating at reduced capacity, in Orlando Disney kept its Typhoon Lagoon water park closed but Blizzard Beach open.

Water parks in hub locations have been missing many of their tourists. Brazil plays a major role in international tourism to Orlando, for example. In 2019, 1.22 million Brazilians flew into Orlando, third behind visitors from Canada and the UK. In California, not a single water park was legally permitted to operate during 2020.

But even in the hard-hit water parks sector, there was some encouraging new development in 2020. Soaky Mountain opened in Sevierville, Tennessee on June 27. It is owned by hospitality and attraction company Wilderness Resorts. In Round Rock, Texas, Kalahari Resorts and Conventions opened Kalahari Round Rock on November 12. It is an indoor water park that is part of a hospitality and mixed-use resort. These reflect a continuing trend of bundling attractions and waterparks with resort properties.

We're looking forward to bringing more and better news on water parks in next year's report, when we expect to chronicle bounce-back and the beginnings of recovery in North America and Latin America.



Even in the hard-hit water parks sector, there was some encouraging new development in 2020.

3.8m

Top 20 water parks in North America attendance 2020

16.4m

Top 20 water parks in North America attendance 2019



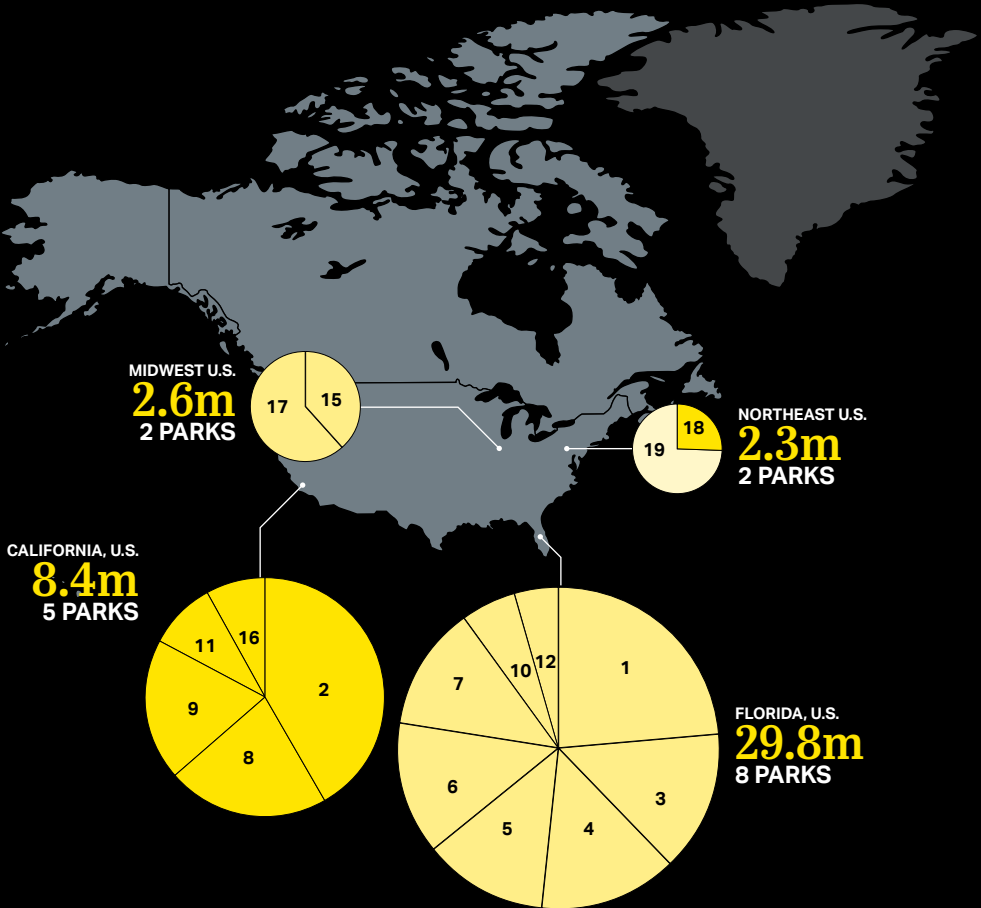


Typhoon Texas, Pflugerville, TX
© Typhoon Texas



Ihu's Breakaway Falls, Aquatica Orlando
© SeaWorld Parks & Entertainment

Top 20 Amusement/Theme Parks North America



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >75%

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	ATTENDANCE 2020	ATTENDANCE 2019
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	-66.9%	6,941,000	20,963,000
2	DISNEYLAND PARK AT DISNEYLAND RESORT, ANAHEIM, CA, U.S.	-80.3%	3,674,000	18,666,000
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9	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	-85.8%	1,299,000	9,147,000
10	SEAWORLD ORLANDO, ORLANDO, FL U.S.	-65.6%	1,598,000	4,640,000
11	KNOTT'S BERRY FARM, BUENA PARK, CA U.S.	-80.9%	811,000	4,238,000
12	BUSCH GARDENS TAMPA BAY, TAMPA, FL U.S.	-69.2%	1,288,000	4,180,000
13	CANADA'S WONDERLAND, MAPLE, ONTARIO, CANADA	-	-	3,950,000
14	SEAWORLD SAN DIEGO, SAN DIEGO, CA, U.S.	-69.5%	1,139,000	3,731,000
15	CEDAR POINT, SANDUSKY, OH, U.S.	-71.7%	1,020,000	3,610,000
16	SIX FLAGS MAGIC MOUNTAIN, VALENCIA, CA, U.S.	-80.5%	686,000	3,521,000
17	KINGS ISLAND, KINGS ISLAND, OH, U.S.	-53.3%	1,626,000	3,485,000
18	SIX FLAGS GREAT ADVENTURE, JACKSON, NJ, U.S.	-82.7%	598,000	3,451,000
19	HERSHEYPARK, HERSHEY, PA, U.S.	-49.3%	1,717,000	3,384,000
20	SIX FLAGS GREAT AMERICA, GURNEE, IL, U.S.	-	-	3,169,000
TOP 20 TOTAL ATTENDANCE 2020			44,302,000	159,108,000
TOP 20 ATTENDANCE CHANGE 2019-20			-72.2%	44,302,000 159,108,000

© 2020 TEA / AECOM

-72.2%

Top 20 amusement/theme parks North America attendance change 2019-20

44.3m

Top 20 amusement/theme parks North America attendance 2020

159.1m

Top 20 amusement/theme parks North America attendance 2019

Top 10 Amusement/Theme Parks Latin America



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019
1	SIX FLAGS MEXICO, MEXICO CITY, MEXICO	-75.0%	701,000	2,803,000
2	BETO CARRERO WORLD, SANTA CATARINA, BRAZIL	-44.1%	1,252,000	2,241,000
3	PARQUE XCARET, CANCUN, MEXICO	-62.4%	736,000	1,960,000
4	MUNDO PETAPA, GUATEMALA CITY, GUATEMALA	-79.8%	268,000	1,330,000
5	LA FERIA DE CHAPULTEPEC, MEXICO CITY, MEXICO	-	-	1,306,000
6	PLAZA DE SESAMO, MONTERREY, MEXICO	-	-	1,173,000
7	PARQUE MUNDO AVENTURA, BOGOTÁ, COLOMBIA	-70.1%	344,000	1,151,000
8	FANTASIALANDIA, SANTIAGO, CHILE	-60.9%	430,000	1,100,000
9	THEME PARQUE NACIONAL DEL CAFÉ, QUINDIO, COLOMBIA	-69.2%	321,000	1,043,000
10	PARQUE DE LA COSTA, BUENOS AIRES, ARGENTINA	-72.8%	263,000	968,000
TOP 10 TOTAL ATTENDANCE 2020			4,315,000	15,075,000
TOP 10 ATTENDANCE CHANGE 2019-20		-71.4%	4,315,000	15,075,000

© 2020 TEA / AECOM

-71.4%

Top 10 amusement/theme parks Latin America attendance change 2019-20

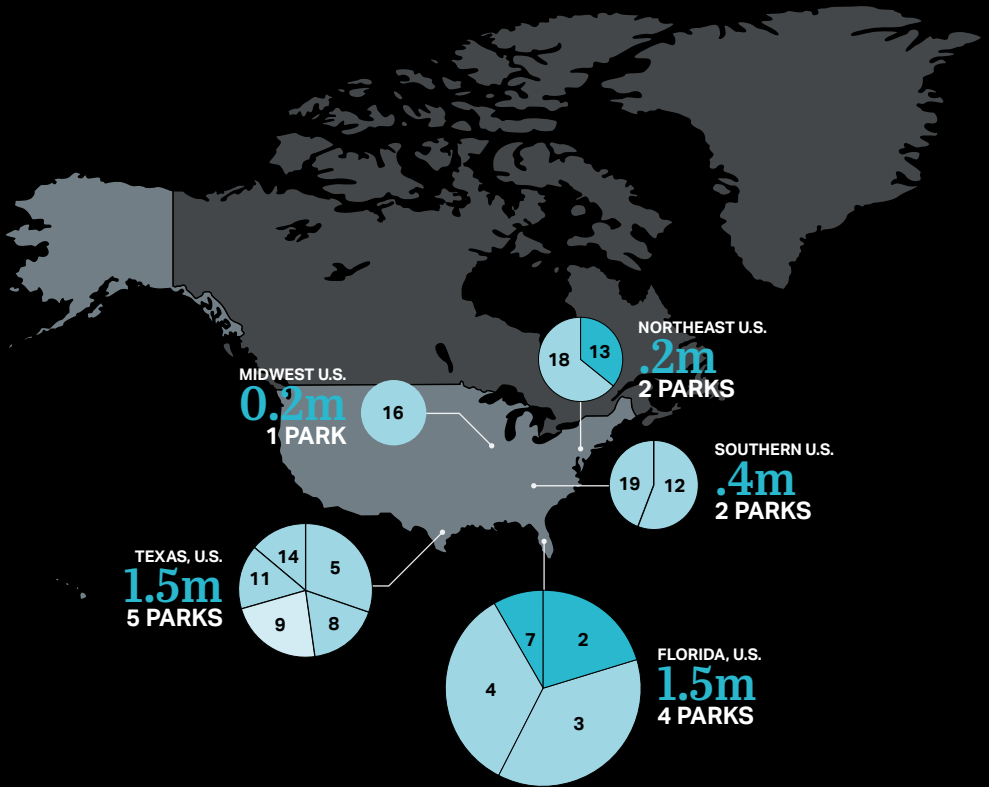
4.3m

Top 10 amusement/theme parks Latin America attendance 2020

15.1m

Top 10 amusement/theme parks Latin America attendance 2019

Top 20 Water Parks North America



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019
1	DISNEY'S TYPHOON LAGOON WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	-	-	2,248,000
2	DISNEY'S BLIZZARD BEACH WATER PARK AT WALT DISNEY WORLD RESORT, ORLANDO, FL, U.S.	-84.1%	316,000	1,983,000
3	UNIVERSAL'S VOLCANO BAY, ORLANDO, FL, U.S.	-69.6%	551,000	1,811,000
4	AQUATICA, ORLANDO, FL, U.S.	-65.6%	528,000	1,533,000
5	SCHLITTERBAHN, NEW BRAUNFELS, TX, U.S.	-54.7%	451,000	996,000
6	WATER COUNTRY USA, WILLIAMSBURG, VA, U.S.	-	-	736,000
7	ADVENTURE ISLAND, TAMPA, FL, U.S.	-80.9%	125,000	656,000
8	AQUATICA SAN ANTONIO, SAN ANTONIO, TX, U.S.	-59.6%	263,000	651,000
9	SCHLITTERBAHN, GALVESTON, TX, U.S.	-40.6%	337,000	567,000
10	SPLISH SPLASH, CALVERTON NY, U.S.	-	-	542,000
11	SIX FLAGS-HURRICANE HARBOR, ARLINGTON, TX, U.S.	-56.3%	235,000	538,000
12	SIX FLAGS WHITE WATER ATLANTA, MARIETTA, GA, U.S.	-54.8%	238,000	526,000
13	SIX FLAGS HURRICANE HARBOR, JACKSON, NJ, U.S.	-82.4%	85,000	482,000
14	TYPHOON TEXAS, KATY, TX, U.S.	-57.5%	203,000	478,000
15	SIX FLAGS HURRICANE HARBOR SPLASHTOWN, SPRING, TX, U.S.	-	-	475,000
16	ZOOMBEZI BAY, POWELL, OH, U.S.	-62.2%	176,000	466,000
17	SIX FLAGS HURRICANE HARBOR PHOENIX, GLENDALE, AZ, U.S.	-	-	441,000
18	CAMELBEACH, TANNERSVILLE, PA, U.S.	-65.6%	151,000	439,000
19	DOLLYWOOD'S SPLASH COUNTRY, PIGEON FORGE, TN, U.S.	-56.6%	188,000	433,000
20	CEDAR POINT SHORES, SANDUSKY, OH, U.S.	-	-	424,000
TOP 20 TOTAL ATTENDANCE 2020			3,847,000	16,425,000
TOP 20 ATTENDANCE CHANGE 2019-20		-76.6%	3,847,000	16,425,000

© 2020 TEA / AECOM

-76.6%

Top 20 water parks North America attendance change 2019-20

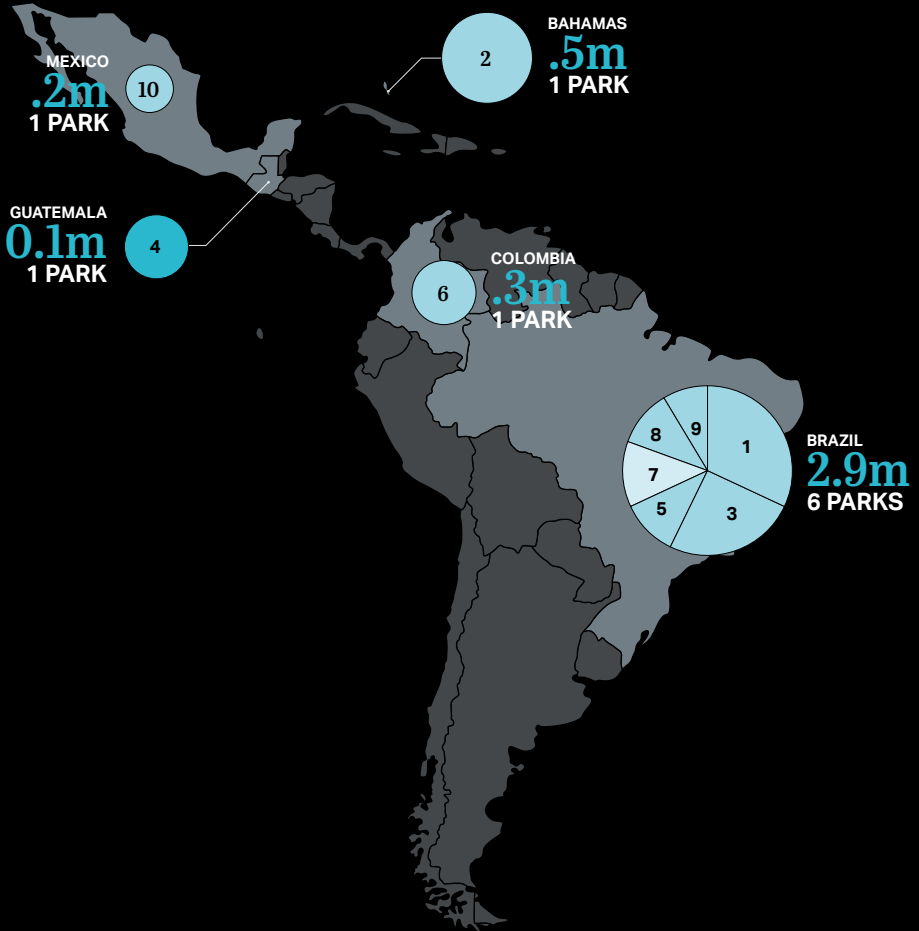
3.8m

Top 20 water parks North America attendance 2020

16.4m

Top 20 water parks North America attendance 2019

Top 10 Water Parks Latin America



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

2019 RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2020	ATTENDANCE 2019
1	THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	-50.0%	922,500	1,845,000
2	BAHAMAS AQUAVENTURE WATER PARK, PARADISE ISLAND (NASSAU, NEW PROVIDENCE), BAHAMAS	-72.8%	494,000	1,813,000
3	HOT PARK RIO QUENTE, CALDAS NOVAS, BRAZIL	-50.0%	734,500	1,469,000
4	PARQUE ACUATICO XOCOMIL, SAN MARTÍN ZAPOTITLÁN, RETALHULEU, GUATEMALA	-86.5%	121,000	894,000
5	BEACH PARK, AQUIRAZ, BRAZIL	-65.0%	312,000	890,000
6	PISCILAGO, GIRARDOT (BOGOTA), COLOMBIA	-65.0%	307,000	876,000
7	MAGIC CITY WATER PARK, SUZANO, BRAZIL	-47.9%	355,000	681,000
8	THERMAS WATER PARK, SÃO PEDRO, BRAZIL	-50.9%	315,000	641,000
9	HOT BEACH, OLYMPIA, BRAZIL	-60.0%	243,200	608,000
10	PARQUE ACUATICO EL ROLLO, MORELOS, MEXICO	-60.0%	210,000	525,000
TOP 10 TOTAL ATTENDANCE 2020			4,014,200	10,242,000
TOP 10 ATTENDANCE CHANGE 2019-20		-60.8%	4,014,200	10,242,000

© 2020 TEA / AECOM

-60.8%

Top 10 water parks
Latin America attendance
change 2019-20

4.0m

Top 10 water parks
Latin America attendance
2020

10.2m

Top 10 water parks
Latin America attendance
2019

Asia-Pacific

A story of growth interrupted

Attendance numbers for parks and attractions throughout Asia were down sharply in 2020 due to closures, regulations, and restrictions. To what degree they were affected varied depending on when a particular country or region was hit by the first COVID wave, the timing and duration of lockdowns and closures, travel limitations, the rate of vaccination, and other control measures as well as geography and the nature of the property itself.



Beth Chang

Executive Director –
Economics, Asia-Pacific



Chris Yoshii

Vice President – Economics,
Asia-Pacific





Rendering of Chimelong Marine Science Park,
set to open next to Chimelong Ocean Kingdom in
2021 as a second gate of the Chimelong
International Ocean Tourist Resort in Zhuhai, China.
© Chimelong Group



Asia's theme parks and water parks

How much parks were able to bounce back in 2020 after re-opening also varied, tied to a host of factors including location, operating season, special offers and marketing, travel patterns and type of facility. In the third quarter of 2021, at this writing, emerging new variants of the COVID-19 virus are bringing fresh challenges.

In the Asia-Pacific region, the top 20 theme parks saw attendance numbers drop a total of 58% in 2020. The impact to China has been different than in other parts of Asia.

Being hit very early in the pandemic China was the first to implement restrictions and closures. Nonetheless, new parks and attractions continued to open even during the pandemic, though with some delays. China added nearly 20 parks. The most

prestigious of these is Universal Beijing, with its September 2021 grand opening. The OCT and Fantawild chains both opened new parks, while Chimelong Paradise expanded. Ocean Park Hong Kong has opened its new, year-round water park, Water World. In Osaka, Japan, Universal Studios Japan opened Super Nintendo World™ in March 2021. Meanwhile there are still quite a few new properties under construction, and plenty of buzz about new projects. The trend is toward mixed-use: clusters of small attractions, which are easier to finance than one large park.

Like their counterparts around the world, Asian parks turned to technology to adapt operations and guest services for pandemic conditions. Operators that had long depended on third-party bookings upgraded their systems and websites,

allowing them to serve customers directly and gaining more control over ticket sales and data collection, which helps boost profitability.

China

As mentioned above, our research indicates that most parks in China saw attendance numbers drop significantly in 2020 due to closures and capacity restrictions, with certain exceptions. Not only was international tourism at a standstill, domestic tourism (from one province to another within the country) was also banned during this period. As a result, even after reopening, most of China's theme parks and water parks have been drawing on a much smaller pool of visitors than previously, although the country's sizeable resident population is a home advantage.

Parks in China had the first wave of closures in 2020 in late January and first reopened by late March at about one-third capacity, while the country gradually returned to something like business as usual (sans international tourism). Domestic air travel and high-speed rail were operating at about 90% of normal capacity; outdoor scenic areas and parks were doing well, with people seeking open, outdoor activities.

“

China added nearly 20 parks during the pandemic.

Shanghai Disneyland, Shanghai, China
© Disney



The major operators

Some parks were able to sustain higher attendance numbers as they were already oriented to local markets. Notably in this category was the government-owned chain OCT Group, which reported an average decline of only 14% among its 37 parks in more than 20 cities. OCT did a lot of marketing to encourage guests to return - and sweetened the deal with deep discounts on admission. And even though it was 2020, OCT moved ahead with expansions and additions, including a new Happy Valley theme park in Nanjing, three new water parks in Nanjing, Shunde and Xiangyang, and several small attractions including an observation wheel in Shunde.

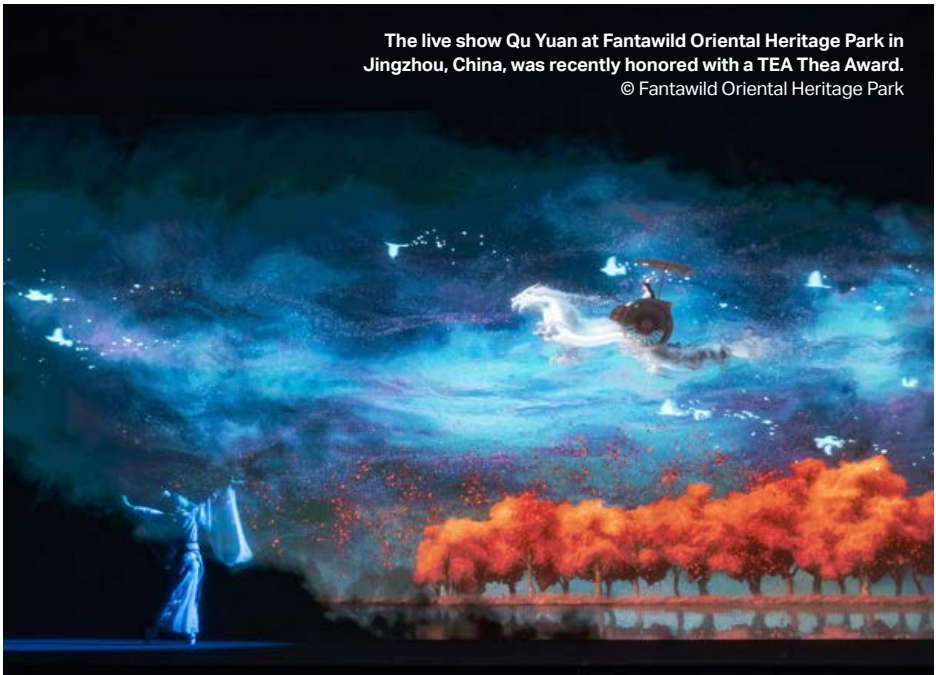
Fantawild parks are primarily targeted to local audiences, including school groups, with their local culture and history theme.

For this chain, 2020 attendance numbers dropped an average of 20%, with declines ranging from 10% to 60% among the operator's 26 parks. In 2019-2020, some were open only part of the year and some closed altogether. Nonetheless, in 2020 Fantawild opened a new Oriental Heritage park in Mianyang. The Fantawild Oriental Heritage Park in Jingzhou was recently honored with a Thea Award for the live show Qu Yuan, which marks the second Thea honor for this operator.

Being more tourism-dependent than the other chains, and featuring many indoor shows, Chimelong Group properties experienced a more severe attendance drop in 2020, averaging 59% across the various parks. As the most locally oriented of Chimelong parks, Chimelong Paradise in Guangzhou saw the best returns of the group, and also opened a new show and themed area in 2020.

The live show Qu Yuan at Fantawild Oriental Heritage Park in Jingzhou, China, was recently honored with a TEA Thea Award.

© Fantawild Oriental Heritage Park





Everland, Seoul, South Korea
© Everland

Disney, the world's leading theme park operator, has demonstrated optimism about the future. Shanghai Disney Resort has been celebrating its fifth anniversary in 2021 and has announced another admission price increase, planned to take effect in January 2022. This would be the third time the park has raised the price since first opening to the public in 2016.

The move, along with the planned expansion with an under-construction land themed to Zootopia, reflects Disney's confidence in its operations in China, as well as the company strategy to keep growing per-visitor revenue. Development of a new, Frozen-themed land at Hong Kong Disneyland is also underway.

Looking ahead

Even in the pandemic, China's attractions industry continues to evolve and expand as the country moves toward a leading global position. A number of older theme parks are beginning to shut down or relocate as they reach the end of their land leases (generally 40 years). Built on the outskirts of cities that have continued to grow, surrounding them with urban development, these parks are sitting on land that has increased greatly in value, presenting the opportunity to relocate to parcels farther out and redevelop the parks. As they do so, Chinese parks have plenty of opportunity to raise their game with technology such as virtual ride queues and to support VIP experiences and operations in general.

Discounting admission to boost attendance is a short-term strategy. To succeed over the long term, a park needs to deliver a high-quality experience. Engaged guests stay longer, spend more money, share their experiences with others and come back for more. In a situation such as the current pandemic, people are limiting how much they go out and the decision to visit a theme park is not made lightly. People do want to get out, to gather with friends and family, to enjoy time outdoors - but they will look for high-quality options. The better-quality parks are able to stand more firmly on price, and their per caps revenue will recover more quickly.

Due to travel constraints, Universal Beijing Resort will need to draw its initial attendance from the approximately 20 million population in the nation's capital city. The summer season portends to be uneven, and the Beijing winter is quite cold, so the park's first big year entertaining the public will most likely be 2022. What happens in winter may

be instructive: If Universal Beijing sets a successful example for winter operations, it will influence the market for other parks in the northern regions.

Be that as it may, the establishment of Universal Beijing Resort, and the ongoing expansion of Shanghai Disney Resort, continue an upward trajectory for the industry, and reinforce the notion of quality entertainment for parks in China and Asia—raising the bar in the use of technology and media and leading other parks and all sorts of attractions to follow suit. Many operators have already been part of this trend, with substantial upgrades to their properties. Universal Beijing has also set an exemplary standard in being the first LEED-certified theme park in the world. As China pushes to reduce greenhouse gas emissions and cut its carbon footprint, we will see more innovation of this kind, moving toward reduced energy consumption and more sustainable development with less waste.

Ocean Park Hong Kong, Hong Kong, SAR
© Lee Yiu Tung | Shutterstock





Even in the pandemic, China's attractions industry continues to evolve and expand as the country moves toward a leading global position.

Japan

Because Tokyo's two Disney parks were shut down by February 2020 and didn't reopen until July, their attendance drop for the year was close to 80%. Similarly, Universal Studios Japan (Osaka), reopened earlier in June, suffering a smaller, 66% drop in 2020; however, the much-anticipated Super Nintendo World opened there in March 2021.

Korea

Korea was hit early by the pandemic and experienced multiple cycles of businesses opening and closing. Everland and Lotte World respectively were hit with 58% and 74% attendance decreases. Everland's better figures likely reflect its having more outdoor experiences and being more of a vacation destination whereas Lotte World is more of an urban, indoor facility.

Southeast Asia

In warmer climates such as Southeast Asia, parks tend to have longer operating seasons and, in 2020, this gave them more time to recoup attendance losses after reopening. The average attendance drop was 40-50%. However, due to the region's high rate of COVID infection and low vaccination rate, parks in Southeast Asia may not do as well in 2021.



59.5m

Top 20 theme parks in Asia-Pacific attendance 2020

141.3m

Top 20 theme parks in Asia-Pacific attendance 2019



Water parks

How well a particular water park did in terms of attendance in 2020 in Asia depended on whether conditions allowed it to be open for the summer season.

Chinese water parks, allowed to open by late May, were pretty much able to capture summer, though with limited capacity and the need to address guests' heightened hygiene concerns. The Atlantis Sanya resort water park was the only one with essentially no loss of attendance. Geography and demographics were in its favor - it is located on an island that was able to better contain the pandemic, and as an established resort destination, it drew affluent Chinese guests who weren't able to travel overseas. Tickets also were heavily discounted. In general, when a market starts to recover, it recovers

more quickly at the higher end as the affluent recover their ability to travel first. This is well demonstrated by the cruise ship industry.

Poseidon Beach Water World in Harbin (China) had a typical result for a facility with mostly indoor activities, with a 67% drop in attendance. Water parks with more outdoor features did best.

Australia did a very good job of containing the pandemic in 2020, and because of its seasonal cycle, parks were not overly affected when the warm weather began, especially on the Gold Coast. This year, however, has brought new challenges and lockdowns to the country.





“

Chinese water parks, allowed to open by late May, were pretty much able to capture summer, though with limited capacity and the need to address guests' heightened hygiene concerns.

11.1m

Top 20 water parks in
Asia-Pacific attendance 2020

21.6m

Top 20 water parks in
Asia-Pacific attendance 2019



Adapting and improving

In China, various strategies and fresh approaches are being employed to help water parks perform better in the new conditions, and these can be instructive examples for all park operators.

The pandemic accelerated the transition to electronic ticketing. Guests now use apps within WeChat to make reservations and pay for admissions. Facial recognition technology has been adopted at some water parks. This enables guests to enter, participate and make purchases without having to carry their wallet and phone around the property.

We've also observed that in 2021 a number of water parks opened a bit earlier (April vs. June) to extend the season. However, the appearance of the Delta virus variant put a damper on this, entering China in mid-summer and interrupting domestic travel across provinces.

The Chinese government is promoting a "nighttime economy" to help stimulate domestic demand. Many attractions have been adding evening activities this year, including water parks that traditionally avoided nighttime operations. The new OCT Shunde water park has had success offering nighttime ticket discounts, drawing as much as three-quarters of the day's attendance and giving guests the opportunity to experience the park without the intense summer heat and sun of Southern China. The EDM (electronic dance music festival) is popular in China among young people, and some water parks are incorporating it for nighttime operations. One water park's creative and highly Instagrammable twist: placing boats in the lazy river for guests to row, and enhancing the path with colorful lighting.



To utilize their space more fully at all times of year, many water parks have begun to explore hosting seasonal events such as Halloween in fall, ice-and-snow festivals in winter, light festivals around the Chinese New Year, etc.

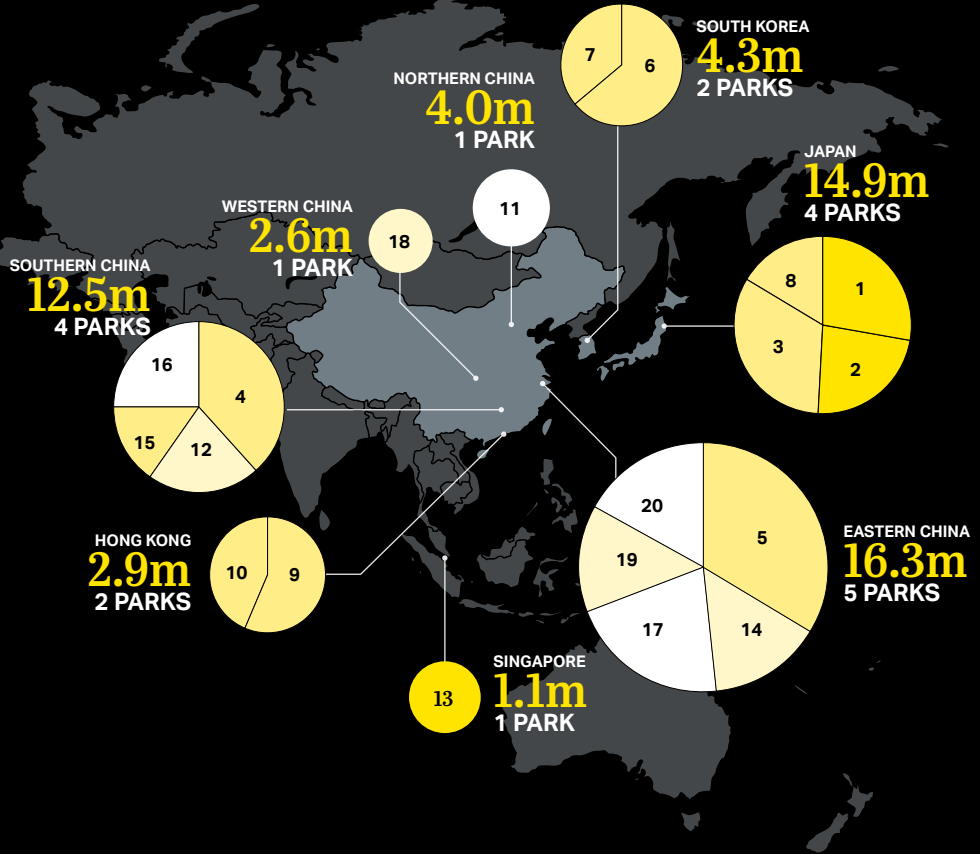
A new wave of boutique water parks as resort amenities cater to increased demand for short-distance, regional travel and staycation options. These mid- to small-scale indoor/ outdoor water parks are being packaged with on-site hotels. This trend, begun a few years ago, aligns well with guests' needs in the pandemic today and we expect to see it in some high-profile future developments.



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The Chinese government is promoting a *nighttime economy* to help stimulate domestic demand. Many attractions have been adding evening activities this year, including water parks that traditionally avoided nighttime operations.

Top 20 Amusement/Theme Parks Asia-Pacific



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Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019
1	TOKYO DISNEYLAND AT TOKYO DISNEY RESORT, TOKYO, JAPAN	-76.8%	4,160,000	17,910,000
2	TOKYO DISNEYSEA AT TOKYO DISNEY RESORT, TOKYO, JAPAN	-76.8%	3,400,000	14,650,000
3	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	-66.2%	4,901,000	14,500,000
4	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	-59.1%	4,797,000	11,736,000
5	SHANGHAI DISNEYLAND AT SHANGHAI DISNEY RESORT, SHANGHAI, CHINA	-50.9%	5,500,000	11,210,000
6	EVERLAND, SEOUL, SOUTH KOREA	-58.2%	2,760,000	6,606,000
7	LOTTE WORLD, SEOUL, SOUTH KOREA	-73.8%	1,560,000	5,953,000
8	NAGASHIMA SPA LAND, KUWANA, JAPAN	-59.7%	2,400,000	5,950,000
9	OCEAN PARK, HONG KONG SAR	-61.4%	2,200,000	5,700,000
10	HONG KONG DISNEYLAND, HONG KONG SAR	-70.1%	1,700,000	5,695,000
11	OCT HAPPY VALLEY, BEIJING, CHINA	-23.4%	3,950,000	5,160,000
12	CHIMELONG PARADISE, GUANGZHOU, CHINA	-45.3%	2,681,000	4,905,000
13	UNIVERSAL STUDIOS SINGAPORE, SINGAPORE	-75.6%	1,098,000	4,500,000
14	CHINA DINOSAUR PARK, CHANGZHOU, CHINA	-46.4%	2,375,000	4,434,000
15	OCT WINDOW OF THE WORLD, SHENZHEN, CHINA	-52.6%	1,890,000	3,990,000
16	OCT HAPPY VALLEY, SHENZHEN, CHINA	-21.6%	3,120,000	3,980,000
17	ZHENGZHOU FANTAWILD ADVENTURE, ZHENGZHOU, CHINA	-10.9%	3,421,000	3,840,000
18	OCT HAPPY VALLEY, CHENGDU, CHINA	-26.8%	2,620,000	3,580,000
19	NINGBO FANTAWILD ORIENTAL HERITAGE, NINGBO, CHINA	-36.9%	2,257,000	3,575,000
20	OCT HAPPY VALLEY, SHANGHAI, CHINA	-19.5%	2,730,000	3,390,000
TOP 20 TOTAL ATTENDANCE 2020			59,520,000	141,264,000
TOP 20 ATTENDANCE CHANGE 2019-20			-57.9%	59,520,000 141,264,000

© 2020 TEA / AECOM

-57.9%

Top 20 amusement/theme parks attendance change Asia-Pacific 2019-20

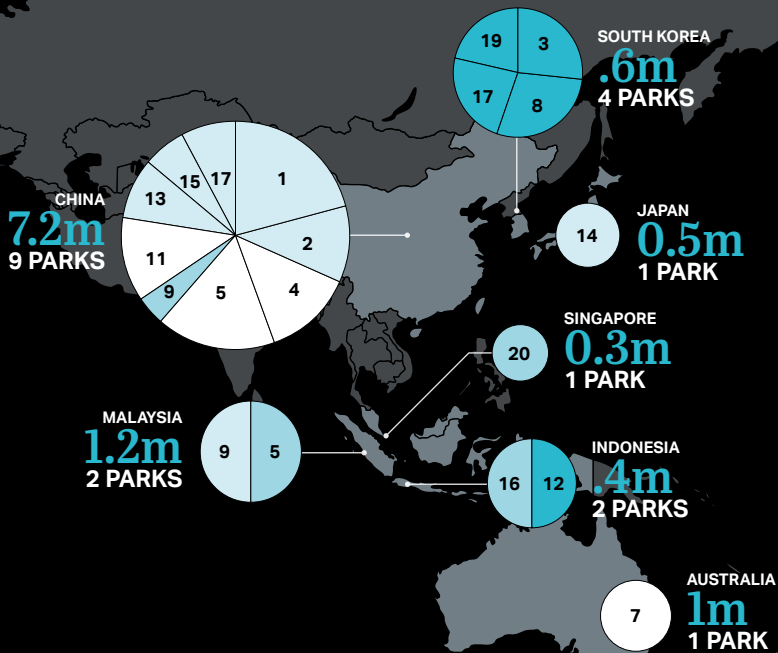
59.5m

Top 20 amusement/theme parks Asia-Pacific attendance 2020

141.3m

Top 20 amusement/theme parks Asia-Pacific attendance 2019

Top 20 Water Parks Asia-Pacific



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

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- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019	
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	-49.8%	1,512,000	3,014,000	
2	WUHU FANTAWILD WATER PARK, WUHU, CHINA	-42.8%	770,800	1,348,000	
3	CARIBBEAN BAY, SEOUL, SOUTH KOREA	-87.4%	168,000	1,333,000	
4	PLAYA MAYA WATER PARK, WUHAN, CHINA	-23.1%	930,000	1,210,000	
5	AQUAVENTURE ATLANTIS, SANYA, CHINA	0.0%	1,200,000	1,200,000	
	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	-50.0%	600,000	1,200,000	
7	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	-15.0%	952,000	1,120,000	
8	OCEAN WORLD, HONGCHEON, SOUTH KOREA	-83.2%	180,000	1,071,000	
9	POSEIDON BEACH WATER WORLD, HARBIN, CHINA	-67.3%	299,600	916,700	
	SUNWAY LOST WORLD OF TAMBUN, PERAK, MALAYSIA	-40.0%	600,000	1,000,000	
11	PLAYA MAYA WATER PARK, SHANGHAI, CHINA	-11.3%	860,000	970,000	
12	ATLANTIS WATER ADVENTURE, JAKARTA, INDONESIA	-75.8%	220,000	910,000	
13	ZHENGZHOU FANTAWILD WATER PARK, ZHENGZHOU, CHINA	-31.2%	622,300	905,000	
14	SUMMERLAND, TOKYO, JAPAN	-47.7%	454,000	868,000	
15	XIAMEN FANTAWILD WATERPARK, XIAMEN, CHINA	-46.9%	442,000	832,000	
16	THE JUNGLE WATER ADVENTURE, BOGOR, WEST JAVA, INDONESIA	-74.5%	200,000	785,000	
17	PLAYA MAYA WATER PARK, TIANJIN, CHINA	-26.7%	550,000	750,000	
	WOONGJIN PLAYDOCI WATERDOCI, BUCHEON, SOUTH KOREA	-80.5%	146,000	750,000	
19	LOTTE WATER PARK, GIMHAE, SOUTH KOREA	-82.1%	132,800	740,000	
20	ADVENTURE COVE WATER PARK, SINGAPORE	-57.7%	300,000	710,000	
TOP 20 TOTAL ATTENDANCE 2020			11,139,500	21,632,700	
TOP 20 ATTENDANCE CHANGE 2019-20			-48.5%	11,139,500	21,632,700

© 2020 TEA / AECOM

-48.5%

Top 20 water parks Asia-Pacific attendance change 2019-20

11.1m

Top 20 water parks Asia-Pacific attendance 2020

21.6m

Top 20 water parks Asia-Pacific attendance 2019

Europe's Regional Advantage

In the EMEA region total attendance decline in 2020 was 66% for the top 20 theme parks and 61% for the top 10 water parks.

Park attendance in Spain was down 80% while Efteling Park in The Netherlands, for instance, was down only 45%.

As in other parts of the world, the impact on attendance depended on a range of factors besides international tourism - including when and how COVID spread in a particular country relative to the operating season and the number of days a park was closed, the type of restrictions enacted, the type of park, and people's degree of concern about being in large groups. The pandemic became severe in Italy, the UK and Spain at an early stage. Germany and The Netherlands were hit later in the year, which enabled parks there to serve their mostly domestic markets in the peak summer season.



Jodie Lock

Associate Director – Economics,
Asia-Pacific and EMEA





Liseberg, Gothenburg, Sweden
© Liseberg

Overall, the sector did relatively well in pandemic-hit 2020 and is poised to recover more quickly than some other markets, simply because European parks skew regional. Most of these parks were constructed 30-50 years ago, some distance away from city centers and mainly reachable by car.

Many parks made the best of the downtime, positioning for recovery by moving ahead with new openings, expansions and improvements with more to follow.

Dubai was set to host the very first world's fair in the Middle East in 2020. The pandemic pushed back the expo's schedule, and while retaining the original name Expo 2020 Dubai, its new opening date is Oct. 1, 2021. The expo will conclude its six-month run March 31, 2022.

22.2m

Top 20 theme parks in EMEA attendance 2020

64.5m

Top 20 theme parks in EMEA attendance 2019

Women of Warner,
Warner Bros. World, Abu Dhabi, U.A.E.
© Warner Bros.





Max and Moritz family roller coaster, Efteling Park
© Efteling

Around the region

Efteling was fortunate in having the advantages of an established local following during a time of travel bans and being able to welcome guests for 268 days in 2020, though its attendance numbers were down by 45%. The Dutch park was obliged to close for only a fraction of the time many other parks were shut, and in the course of its 2020 season opened a new ride (the family rollercoaster Max & Moritz, based on a well-known German poem), presented its Aquanura water show in the fall, and hosted the Warme Winter Weide winter garden. Efteling also took the opportunity to provide continuity and content to its website visitors in 2020, including a drone view of the park in full bloom as well as a virtual tour through the Fairytale Forest. The park marked 69 years in June 2021 and is currently moving forward on its "World of Efteling 2030" plan that was recently approved by the Dutch Council of State.

In Spain, at PortAventura World - now a three-gated resort with multiple hotels - attendance was down 80% in 2020, due to its being open for only 101 days (closed for 264 days) and unable to open its water park. This was due to strict controls in the province of Catalonia and restrictions on movement between provinces, which stifled domestic tourism. The operator is moving ahead with expansion plans for one of its hotels and was honored this year with a Thea Award for its Sesame Street: Street Mission attraction.

In France, the Disney parks suffered from untimely closures, impacting the usually lucrative spring/summer holiday period and seasonal festivities around Halloween and Christmas. The parks were closed 198 days in total, covering the periods running from mid-March through to the end of July, and late-October until the New Year. As one of few major IP parks in Europe, Disneyland Paris is very reliant on international visitation; therefore, the Disney properties were more acutely impacted by



Peppa Pig Land at Gardaland Park, Italy
© Merlin Entertainments



The new Hotel New York – Art of Marvel at Disneyland Paris
© Disneyland Paris



Development on new experiences continued at Disneyland Paris, which reopened with the new Cars Road Trip, followed by Hotel New York—Art of Marvel and Disney Junior Dream Factory.

international travel restrictions than most other theme parks in Europe. However, as with other Disney parks, development on new experiences continued and Disneyland Paris was able to reopen with the new Cars Road Trip - and shortly thereafter, Hotel New York - Art of Marvel and Disney Junior Dream Factory also opened.

Futuroscope (Poitiers, France) was open for 168 days in 2020 instead of its usual 280 days. Fortunately, those 168 days allowed the park to capture the peak summer season and therefore experience what was a relatively low attendance drop in 2020. Cultivating optimism, Futuroscope persevered with plans for "Vision 2025" - an extensive, 300 million Euro growth/transformation leveraging the park as an economic catalyst for the region. Vision 2025 will expand Futuroscope's offerings in hospitality, entertainment and education with two hotels, a water park, three new attractions and a new night show, and an emphasis on green construction. To achieve this in the midst of a COVID crisis required a speedy adaptation to remote work, meetings and file sharing. The park also supported research on COVID and made a special effort to give moral support to its health staff.



Parc Asterix, Plailly, France
© Parc Asterix



PortAventura World, Salou, Spain
© PortAventura World



Puy du Fou (Les Epesses, France) experienced a delayed 2020 season, opening in July rather than April, thus losing three months. However, the operator continued its expansion momentum during the pandemic to open Puy du Fou España in Toledo in March 2021, building on the success of its original park in France, which will also roll out a series of new attractions in the near future. Puy du Fou España features four daytime shows, three period villages and a night show. The operator is also expanding into China, with a standalone show, SAGA SHANGHAI, to open in 2022.

Also expanding eastward: Merlin Entertainments, which already operates a host of mature parks and attractions in Europe (many of them in the hard-hit UK) and North America. Its LEGOLAND New York opening was pushed back but took place in May 2021, to be followed by LEGOLAND Korea Resort in spring

2022. Meanwhile Merlin has also entered a cooperation agreement in Shanghai to develop a resort there and has agreements in Szechuan and Guangdong as well.

Merlin's UK parks suffered badly from the pandemic situation due to strict COVID controls, travel bans and lockdowns, though its LEGOLAND parks benefited from staycationers, as did its resort properties. In general, the effect on attendance at parks in the UK has been exacerbated by fears and hesitancy about being in crowds.

Liseberg (Sweden) also focused on the future while enduring a difficult present, under the mandatory closure imposed on all theme parks in Sweden in 2020. The park's expansion plans will help extend its operating season and guests' length of stay. Liseberg will add a new, 457-room hotel and indoor water park projected to open in 2023-24.

What about the Middle East and Africa, the "MEA" in EMEA?

The UAE was one of a short list of destinations that were open in 2020 to British and German tourists seeking winter weather respite, so theme parks there may have had a better-than-usual season in spite of everything else. At this point, no theme park in the Middle East has yet achieved the attendance numbers that would earn it a place on our charts. That said, the UAE boasts several notable and even pioneering theme parks and water parks - among them are Warner Bros. World Abu Dhabi (recipient of a Thea Award last year), Ferrari World Abu Dhabi, Yas Waterworld and IMG Worlds of Adventure. There has also been a flurry of activity in recent years around the development of Expo 2020 Dubai.

On the continent of Africa, the pain in the attractions sector was severe indeed in 2020. As of yet, no parks in Africa have sufficient attendance to land on our charts, but we are watching this region as well. Attractions in South Africa were unfortunately beset with revenue losses and financial challenges due to closures in 2020, though eventually reopening under strict safety protocols. Gold Reef City in Joburg, for example, was closed March-December. In Durban, uShaka Marine World reported that its normal capacity of 8,000 was curtailed to 250. The South Africa tourism department noted in April 2020 that revenues had declined 80% and bookings 71% in the “activities and experiences” sub-sector.

“

Cultivating optimism, Futuroscope persevered with plans for *Vision 2025*—an extensive, 300 million Euro growth/transformation leveraging the park as an economic catalyst for the region.



Phantasialand, Brühl, Germany
© Y. Pieper | Shutterstock

Water Parks

Our research shows that water parks in EMEA performed marginally better in 2020 than theme parks. The top-attended parks that are the subject of our study are mostly located in Northern Europe and the UAE. Their annual attendance in 2020 was down by 61.3% to 65.5%.

As elsewhere, how much the park depended on tourism vs a resident visitor base made a significant difference. The more regional, the better. Parks in Germany, Denmark and the Netherlands with strong resident visitor followings were down 50%-60%. Worst affected was Siam Park in Tenerife, Spain, an island with a small residential population that is an international tourist destination and very popular with the British, who make up 40% of tourist visitation (almost triple the number of visitors from Mainland Spain).



Dubai's Aquaventure, the second-most visited water park in EMEA, is setting up for future success with the stated goal of reaching the two million visit mark by the end of 2023.

Many facilities sought government assistance. All parks have fixed costs that continue whether or not the property is open to visitors. Indoor water parks, particularly those with spa settings such as Germany's Therme Erding, bore a unique burden in the need to keep a certain level of maintenance and climate control to preserve their trees and waterculture.



Yas Waterworld, Abu Dhabi, U.A.E.
© Yas Waterworld



Rulantica Water Park at
Europa-Park, Rust, Germany
© Europa-Park

In Dubai, Aquaventure - normally the second-most visited water park in EMEA - was operating at about 25% capacity in 2020 but is setting up for future success with the stated goal of reaching the two million visit mark by the end of 2023. The operator rolled out what appears to be the biggest water park expansion in history, bringing the property to 17.5 hectares with an addition of 5.5 hectares. The expansion includes 79 rides and a 450-meter slide, 26 water sports activities and 26 food and beverage outlets.

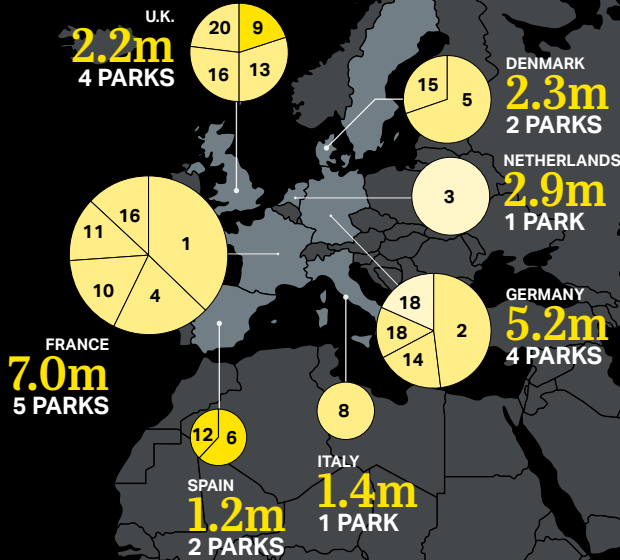
4.1m

Top 10 water parks in
EMEA attendance 2020

10.7m

Top 10 water parks in
EMEA attendance 2019

Top 20 Amusement/Theme Parks EMEA



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019
1	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-73.1%	2,620,000	9,745,000
2	EUROPA-PARK, RUST, GERMANY	-56.5%	2,500,000	5,750,000
3	EFTELING, EFTELING THEME PARK RESORT, KAATSHEUVEL, NETHERLANDS	-44.9%	2,900,000	5,260,000
4	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-73.1%	1,410,000	5,245,000
5	TIVOLI GARDENS, COPENHAGEN, DENMARK	-64.5%	1,628,000	4,581,000
6	PORTAVENTURA WORLD, SALOU, SPAIN	-81.3%	700,000	3,750,000
7	LISEBERG, GOTHENBURG, SWEDEN	-	-	2,950,000
8	GARDALAND, CASTELNUOVO DEL GARDA, ITALY	-53.8%	1,350,000	2,920,000
9	LEGOLAND WINDSOR, WINDSOR, U.K.	-81.5%	450,000	2,430,000
10	PARC ASTERIX, PLAILLY, FRANCE	-50.0%	1,163,000	2,326,000
11	PUY DU FOU, LES EPESSES, FRANCE	-60.0%	923,000	2,308,000
12	PARQUE WARNER, MADRID, SPAIN	-79.8%	450,000	2,232,000
13	ALTON TOWERS, STAFFORDSHIRE, U.K.	-68.5%	670,000	2,130,000
14	PHANTASIALAND, BRÜHL, GERMANY	-51.2%	1,000,000	2,050,000
15	LEGOLAND BILLUND, BILLUND, DENMARK	-64.1%	700,000	1,950,000
16	THORPE PARK, CHERTSEY, U.K.	-68.4%	600,000	1,900,000
	FUTUROSCOPE, JAUNAY-CLAN, FRANCE	-52.6%	900,000	1,900,000
18	LEGOLAND DEUTSCHLAND, GÜNZBURG, GERMANY	-55.9%	750,000	1,700,000
	HEIDE PARK, SOLTAU, GERMANY	-44.1%	950,000	1,700,000
20	CHESSINGTON WORLD OF ADVENTURES, CHESSINGTON, U.K.	-69.8%	510,000	1,690,000
TOP 20 TOTAL ATTENDANCE 2020			22,174,300	64,517,000
TOP 20 ATTENDANCE CHANGE 2019-20		-65.6%	22,174,300	64,517,000

© 2020 TEA / AECOM

-65.6%

Top 20 amusement/theme parks EMEA attendance change 2019-20

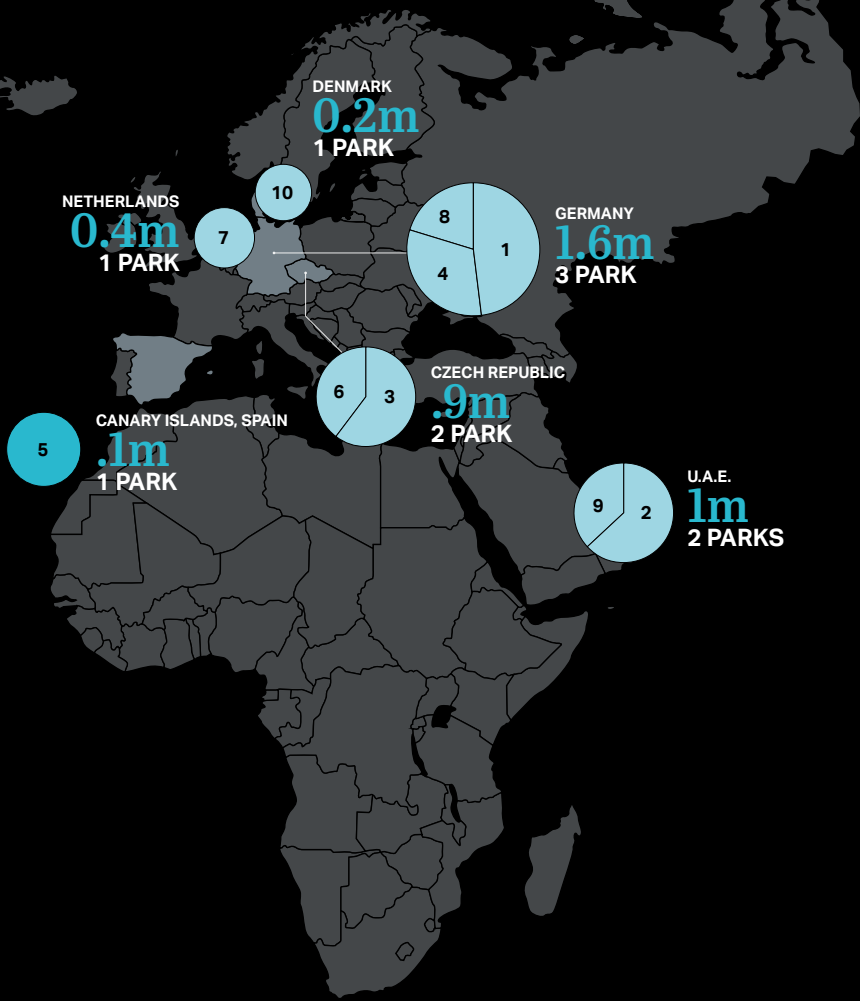
22.2m

Top 20 amusement/theme parks EMEA attendance 2020

64.5m

Top 20 amusement/theme parks EMEA attendance 2019

Top 10 Water Parks EMEA



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019
1	THERME ERDING, ERDING, GERMANY	-59.5%	750,000	1,850,000
2	AQUAVENTURE WATER PARK, DUBAI, U.A.E.	-54.6%	600,000	1,322,000
3	AQUAPALACE, PRAGUE, CZECH REPUBLIC	-58.7%	537,000	1,300,000
4	TROPICAL ISLANDS, KRAUSNICK, GERMANY	-60.0%	493,000	1,233,000
5	SIAM PARK, SANTA CRUZ DE TENERIFE, SPAIN	-91.9%	97,000	1,200,000
6	AQUALAND MORAVIA, PASOHLÁVKY, CZECH REPUBLIC	-54.3%	368,000	806,000
7	TIKI POOL, DUINRELL, THE NETHERLANDS	-51.3%	390,000	800,000
8	NETTEBAD, OSNABRÜCK, GERMANY	-58.9%	311,000	756,000
9	WILD WADI, DUBAI, U.A.E.	-52.7%	350,000	740,000
10	LALANDIA, BILLUND, DENMARK	-64.8%	240,000	682,000
TOP 10 TOTAL ATTENDANCE 2020			4,136,000	10,689,000
TOP 10 ATTENDANCE CHANGE 2019–20		-61.3%	4,136,000	10,689,000

© 2020 TEA / AECOM

-61.3%

Top 10 water parks EMEA attendance change 2019–20

4.1m

Top 10 water parks EMEA attendance 2020

10.7m

Top 10 water parks EMEA attendance 2019

Museums

Inspiring innovation

The experience of the museum industry during 2020 is perhaps the most complex of all attraction types to characterize. Across the board, the COVID-19 pandemic has damaged a thriving, global industry.

There were major declines in attendance due to closures and capacity limitations. There were severe funding challenges leading to staff layoffs. And yet - at the same time, it was a period of unprecedented innovation and growth. Museums made significant investments in technology, staff training, and audience engagement to support a robust and diverse array of wide-reaching virtual programming - a very positive trend in the cycle toward recovery.



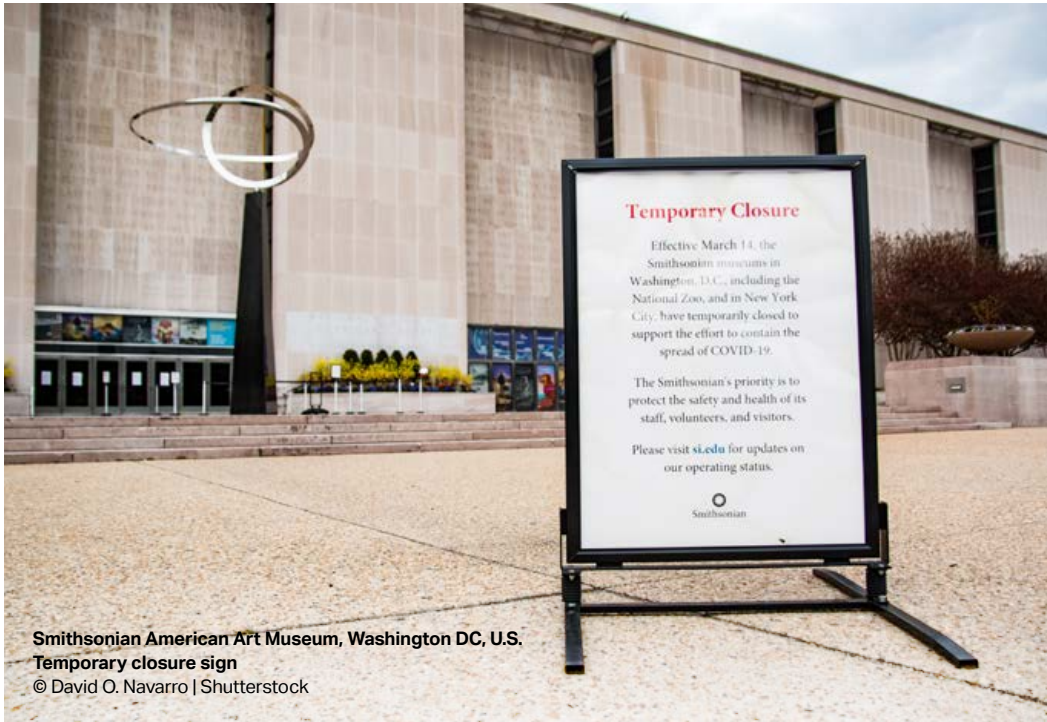
Linda Cheu

Vice President – Economics,
Americas





The Art Institute of Chicago,
Chicago, IL, U.S.
© Kevin Kipper | Shutterstock



Smithsonian American Art Museum, Washington DC, U.S.
Temporary closure sign
© David O. Navarro | Shutterstock

Challenging times

Attendance at the world's top 20 museums in 2020 showed a decrease of 78% across all regions from the prior year, based on our research. Museums were one of the visitor attraction categories most severely affected by COVID-19, liable to be closed for long periods while their regions grappled with its emergence, and subject to rigorous capacity limits and control measures due to being primarily indoor facilities. Closures began in March 2020, and some remained closed for a year or longer, while others opened and then closed again, with variation from one region to another depending on regulations, local conditions and the nature of the facility. Science centers, children's museums, and other museums anchored by hands-on activities experienced particularly lengthy closures. Those museums with

attendance models heavily reliant on international tourism suffered most.

The customary drivers of attendance for museums that we have documented every year since 2012 - when the Museum Index became part of this report - were likewise absent. Tourism and travel came to a halt in 2020, and blockbuster exhibitions were canceled. Older adults, a primary demographic for many museums, were most vulnerable to the virus and deterred from leisure activities. Social events featuring music, food and beverage - that had in recent years become the mainstay in the strategy to attract younger generations and had grown to represent as much as 10% of museum attendance for many institutions - stopped abruptly due to pandemic restrictions around large gatherings.

Audience recovery and expansion

While full recovery is projected to take two to three years, particularly for the large museums dependent upon tourism - especially international tourism - post reopening numbers have been very encouraging, reflecting substantial, pent-up demand for in-person museum experiences. Museums of all types are reporting that particularly on weekends, visitor numbers often reach capacity, with some facilities having to turn away walk-up visitors. In fact, demand is often exceeding supply from an operational perspective as well, as museums deal with staff shortages and hiring challenges.



Museum attendance in 2020 was not an indicator of scale, popularity, marketing, market size, or special exhibitions, but rather the unusual conditions imposed by the pandemic.



California Academy of Sciences,
San Francisco, CA, U.S.
© California Academy of Sciences

Amid the challenges of the pandemic are the signs of a remarkable and resilient industry. Museums everywhere showed themselves to be innovative in finding ways to continue serving their missions and their communities during the pandemic. There is example upon example of museums stepping up to provide online content, to stay connected with and even grow their audiences beyond their traditional markets, and to address contemporary issues - even while their doors were closed and they were understaffed and struggling to find a way to survive, reopen and reinvent for the future. In fact, during the peak of the pandemic when all attraction types were closed in many regions, museums, as mission driven organizations, were often the most active.

Methodology change for 2020

In our top-visited museum charts shown here for 2020, we have not altered the attendance rankings from the 2019 figures. Attendance in 2020 was not an indicator of scale, popularity, marketing, market size, or special exhibitions, but rather the unusual conditions imposed by the pandemic. We will return to the ranking system in next year's Museum Index (a study of calendar year 2021), which will inevitably show some movement up and down, and some new entrants as the market settles into its recovery pattern. However, for this year, we have reported the 2020 attendance numbers for the top 20 museums of 2019, documenting the tremendous shock to the industry and providing a baseline of data for telling the story of recovery in 2021 and beyond.





Vatican Museums, Vatican, Vatican City
© Easy Camera | Shutterstock

Tourist-free Europe

In 2020, as borders closed and other restrictions went into effect in pandemic-stricken Europe, tourism came to a standstill, depriving museums of their summer patrons. Mandated closures cut an average of 112 days from the museums' operating calendars. The total attendance drop of 76% across the top 20 museums in the region reflects this. Recovery will be very much contingent on international travel, with 2024 or 2025 the expected window for tourism-dependent museums in the EMEA region to return to something like pre-COVID levels of attendance. Museums serving regional markets will recover more quickly.

The Louvre in Paris usually occupies the top spot on our charts, and it retained its most-visited status for 2020 as well

thanks to what was reportedly its all-time, most-attended-ever exhibition, attracting 10,000 visits a day: Leonardo da Vinci (Oct 24, 2019 - Feb 24, 2020). Because of those early months of Leonardo, the Louvre's 2020 attendance dip of 72% was considerably less than it might have been. In past years, international tourists have made up 70% of visitors to French museums. But due to the pandemic's effects, arrivals in Paris in 2020 shrank to just 5% of those recorded in 2019.

In London, the Tate Modern was closed for 173 days, leading to a 2020 attendance of 1.43 million, a drop of 77%. The top-attended museum in the UK - London's British Museum, was closed 209 days out of the year with annual attendance of 1.28 million, an 80% decline from 2019. The lack of international tourism had a dramatic impact on the British Museum, which normally receives more than three-quarters of its visits from international visitors.

Italy and Spain's top museums depend very heavily on international tourism, and these countries were the first to impose lockdowns in the 2020 COVID cycle. Italy's was the most heavily affected museum market in Europe. Vatican Museums had the steepest attendance decline of all Europe's museums.

Museums in the Middle East and Africa were not unscathed by the effects of the pandemic, with a lack of tourism reducing visitation across the board and limited access to indoor cultural institutions. This is in contrast to the theme parks and water parks in this region that benefited from European tourists seeking outdoor experiences in warm climates. Looking ahead, news that the UAE has pledged a USD \$6 billion investment to develop creative and cultural industries over the next five years comes at a critical time for the sector.

This investment will support the development of the upcoming Zayed National Museum and Guggenheim Abu Dhabi, building upon the momentum of major projects such as Saadiyat Cultural District, which includes The Louvre Abu Dhabi, and Yas Creative Hub.

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Museums everywhere showed themselves to be innovative in finding ways to continue serving their missions and their communities during the pandemic.





Museum of Science and Industry, Chicago, IL, U.S.
Dr. Strange's mirror room at Marvel: Universe of Super Heroes
© Christine Mitchell

North America

Our research indicates an attendance drop of 81% for the top 20 museums in North America in 2020. Most were closed for a little over a year, starting in March 2020. Some reopened briefly in the spring or summer of 2020 but closed again during late fall, then reopened again in spring 2021 as vaccines rolled out to the public.

Attendance was largely defined by closure dates, capacity restrictions, and composition of attendance between the resident and tourist markets. Those in the largest cities that customarily have significant market support from international tourists were particularly hard hit. This was compounded as urban areas also experienced decreases in resident population as people sought lower density environments.

For example, many of the Smithsonian museums, which are strongly reliant on national and international tourism, were challenged by mandatory closures for two-thirds of the year - with some only open for approximately 120 days in 2020. This led to steep declines in attendance for most, ranging between 80% and 90%. Museums in California struggled with strict pandemic policies; for most, the number of days open in 2020 was between 70 and 120, with corresponding declines in attendance.

In many cases, medium-size museums located outside of major urban areas performed better on a year-over-year percentage basis, due to less reliance on the tourist market and more lenient COVID-19 restrictions. For example, the Denver Museum of Nature and Science experienced a relatively small attendance decrease of 33% - with 991,000 attendees in 2020 -



which represents the lowest year-over-year decline of the top 20 on our North America chart. The museum benefited from a strong resident market base and being able to stay open for all but 100 days in 2020 (most other museums in the top 20 were closed between 200 and 280 days).

During 2020, revenue losses often accompanied drops in attendance, though this varied based upon funding mix. During the Great Recession of 2007-2009, museums experienced substantial declines in endowment and foundation revenue but often saw more stable earned revenue, as museums served as substitute products for more expensive vacations. In contrast, during 2020, museums having large endowments and a higher percentage of revenue from philanthropic donors were somewhat protected, relative to museums more dependent on earned revenue. Publicly-owned-and-operated museums were often able to keep staff and avoid

layoffs and furloughs. Others that were in regions with shorter mandatory closures and fewer capacity restrictions were able to successfully utilize COVID-19 relief funding to help stay afloat during their briefer, temporary closures.



Upon reopening in the spring of 2021, many of the top museums in North America reported selling out of timed tickets and having to turn away walkup visitors.

Continuing to serve mission and markets

Despite these challenges, museums in the US and North America have made an extraordinary effort to pivot and reposition in order to continue serving their audiences and fulfilling their missions with the resources available to them, with a robust array of virtual programming from summer camps to social events to science experiments.

Upon reopening in the spring of 2021, many of the top museums in North America reported selling out of timed tickets and having to turn away walk-up visitors. Older adults, a key visitor demographic for many museum types, returned quickly once they had access to vaccines, and there was a new influx of younger visitors seeking alternatives to bars and restaurants. Many had to reduce staff during the initial shutdowns and subsequently found it difficult to rehire due to a variety of labor market factors, so often times operational issues created additional capacity limitations that exceeded local COVID-19 regulations.

There were a number of notable museums that opened during the pandemic in 2020, including Planet Word in Washington, D.C., the Harriet Tubman Museum in Cape May, New Jersey, the US Olympic and Paralympic Museum in Colorado Springs, and the National Museum of African American Music in Nashville. The art collective Meow Wolf opened two new venues this year, building on the success of its original location, House of Eternal Return in Santa Fe, NM: Omega Mart in Las Vegas, and Convergence Station in Denver.

Finally, major blockbusters and traveling exhibitions are coming back, examples including the traveling immersive Van Gogh exhibits, teamLab: Continuity at the Asian Art Museum in San Francisco, Marvel: Universe of Super Heroes at the Museum of Science and Industry, Chicago, and the Rembrandt in Amsterdam exhibit at the National Gallery of Canada in Ottawa.



Planet Word, Washington, DC, U.S.
Voice-activated interactive dioramas
© Planet Word

Asia

As in other parts of the world, museums in Asia were hard-hit by the pandemic, but the total attendance drop of 72% for the top 20 museums in Asia-Pacific in 2020 was better than in some other regions. China and Taiwan helped to boost this average. Museum closure days ranged widely across Asia. Taiwan more or less escaped the pandemic in 2020 by virtue of its island geography and closed border, and its museums remained open. Chinese museums were closed, on average, for as few as 30 days in 2020. And even with restrictions on international and domestic travel, sheer population numbers kept the museums in China supplied with visitors. The emerging virus variants may affect the picture for 2021, however.

China

The Chinese government in the past decade has been encouraging the development of new museums. The estimate is that a new museum has opened roughly every two days over the past five years, which brought the total number of museums in China close to 6,000 by the end of 2020.

In the early stages of this aggressive museum development boom, there was a lot of emphasis on the architecture and exterior look. This often took the lion's share of the budget, leaving less for collections and the exhibits. However, we have observed this trend shifting over the past two years and the quality of museum exhibits, events and education programs has greatly improved.



National Palace Museum, Taipei, Taiwan
© National Palace Museum



The Shanghai Astronomy Museum boasts the vast, new Shanghai Planetarium with an 8K ultra-high-def dome theater.
© ABCDstock | Shutterstock

As many as 90% of the Chinese museums are now free of admission charges, which encourages attendance. Advance reservation systems have been in place for some time, however, so that even before the pandemic, visitors had developed the habit of planning their museum visits ahead of time.

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Even with restrictions on international and domestic travel, sheer population numbers kept the museums in China supplied with visitors.

Virtual Exhibits

In spring of 2020, Sanxingdui Museum in Sichuan had just completed its renovation on the main exhibit hall. Just one day after its soft opening, however, the museum was obliged to close due to government-imposed COVID restrictions. The museum rebounded by turning the entire opening ceremony and activities into virtual events. It has been able to reach as many as 160,000 visitors online, much higher than what it could have accommodated physically, and subsequently won awards for its online exhibits.

Many other museums in China have also developed virtual tours of their galleries and collections, via their websites and/or their official accounts on WeChat.

National Museum of Natural History,
Washington DC, U.S.
© Chip Clark | Smithsonian Institution



Museums' virtual renaissance

The COVID-19 pandemic created an exponential increase in demand and supply of virtual programming and increased people's comfort with online engagement in activities that previously would only have taken place in person. In some cases, it has become the preferred format for learning or programming and will likely persist post-COVID, while in others, in-person experiences will likely once again become the norm.

Supply, demand and access

The market demand for virtual programming was accelerating pre-COVID as, over the past decade, educators began using more digital content in the classroom. The trend has been supported by technological advances and decreasing technology costs that enable greater access and engagement with at-home audiences. Science centers are often at the forefront of applying technology into museum experience, and some of the largest science centers in the country have invested in digital content, but the trend now also spans other types of museums, including art museums. More than 2,000 museums have partnered with Google Arts & Culture to allow users to access their collections and interactive content online.

In March 2020, sudden, stay-at-home orders due to the COVID-19 pandemic created unprecedented and instant demand for virtual programming. The user base broadened as in the months that followed, audiences across all market segments - including students, teachers, parents, and people of all ages and backgrounds - became more comfortable with virtual programming and invested in technology equipment and infrastructure to improve their experiences. Museums saw attendance to virtual programs such as speaker series, summer camps, and after school programs increase exponentially in some cases relative to attendance to in-person events. For example, California Academy of Sciences transitioned its ever-popular weekly Nightlife event to NightSchool, which had nearly 300,000 views in 2020, and offered a Breakfast Club

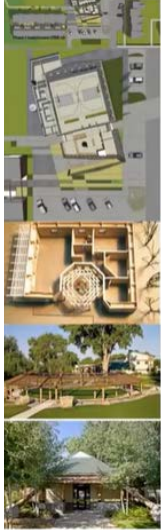
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The COVID-19 pandemic created an exponential increase in demand and supply of virtual programming.



Artful Conversations
National Gallery of Art, Washington, DC, U.S.
© National Gallery of Art

Indigenous Film and Architecture was part of "DMNS On-Demand" virtual programming from the Denver Museum of Nature and Science



CULTURAL ELEMENTS

Tolowa Dee-ni' Nation

7 Directions
Architects / Planners

virtual program, where Academy scientists offered mini-classes on a wide variety of topics from sharks to biodiversity to poisonous birds. Natural History Museum in London created a wide range of digital content, including a 360° virtual tour on Google Arts & Culture of the Fantastic Beasts™ The Wonder of Nature exhibition. We saw this trend in Asia as well, where prior to the pandemic, the "Panoramic Palace Museum" program was available to users through an app, computer, and WeChat. During the pandemic, the Chinese government encouraged museums to promote new technology to support the country's cultural heritage, and over 100 museums created virtual exhibitions located on a centralized portal. The Suzhou Museum created four online games through WeChat and Weibo accounts, where users would assemble Ming Dynasty furniture and create digital artworks by arranging classic Chinese painting elements.

A tale of two cities

Virtual engagement increased the reach of museums to greater audiences but also highlighted the equity issues related to access to - and comfort with - technology. Audience segments - from working mothers, to people with disabilities, to seniors with limited mobility and transportation options - were able to access an international platform of museum programming and content from their homes, which resulted in an exponential increase in attendance to online programs.

Yet there remain significant concerns about the digital divide and equity. The extremely rapid transition to a virtual world has highlighted the considerable challenges to access to technology for certain communities, underscoring the need for more equitable access, particularly in regard to the virtual classroom.

Stories to tell

Museums were able to create topical digital programming that aligned with their missions. The National Museum of American History highlighted a series of new digital programs – “Pandemic perspectives,” “History Time,” “Youth Speak Out,” etc. - that were in response to the unprecedented events of 2020. The University of St. Thomas in St. Paul created an online museum – the Urban Art Mapping George Floyd & Anti-Racist Street Art database documenting the protest art. The Whitney Museum of American Art’s assistant curator, Rujeko Hockley, worked with Instagram to create an online show of Black protest art for Juneteenth.

Museums will tell the story of the pandemic as well. The Singapore National Museum has requested artifacts from the public documenting the pandemic, including

unique face masks and other innovative and creative responses to COVID-19, from objects that people have created or adapted to help them face pandemic challenges to creative works reflecting people’s thoughts on the pandemic. The Victoria and Albert Museum has launched Pandemic Objects, an editorial project that compiles and reflects on objects such as oximeters, soap, bicycles, and toilet paper, that have taken on new meaning and purpose during the pandemic.



The *post-pandemic* museum industry

Virtual programming has the advantage of being flexible and responsive in a shorter timeline with lower required investment than the typical multi-year cycle for planning a blockbuster exhibition. It allows museums to respond to current events and participate in community conversations. Yet weekend after weekend of sold-out entries, with walk-up visitors often turned away, tells us that there is strong demand for in-person museum experiences.

As COVID restrictions lessen, virtual programming is not likely to continue across all categories as museums face continual funding and operational challenges in meeting demand for in-person experiences. Their outpouring of virtual programming represents an investment in time and resources that museums have, so far, found difficult to monetize in any significant way, though it does help reinforce membership and grow audiences. And although they generally hold a position of trust and

authenticity within their communities and with their education partners, museums are facing competition on the content front as private providers have also entered the virtual programming space with its low barriers to entry.

The issues of diversity and inclusion laid bare in 2020 also prompted a call from within and without the museum community to confront those issues within their own organizations. And as noted above, now they have the challenge of how to tell the story of the pandemic as well.

We're optimistic that museums will emerge from the pandemic crisis as stronger cultural assets with a more meaningful connection to their communities and more truly representative of those communities. Those that are most powerfully tied to mission will be the strongest. They will continue to have financial challenges in recovery but will meet those challenges with creativity and ingenuity, taking lessons from other sectors and continuing to refine and define what a sustainable business model looks like for this industry.



The Metropolitan Museum of Art reopened Aug 29, 2020, with the entrance flanked by two banners created by Yoko Ono.
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“

We're optimistic that museums will emerge from the pandemic crisis as stronger cultural assets with a more meaningful connection to their communities and more truly representative of those communities.

22.4m

Top 20 museums worldwide attendance 2020

105.5m

Top 20 museums worldwide attendance 2019



Top 20 Museums Worldwide

2019 RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2020	ATTENDANCE 2019	FREE/PAID
1	LOUVRE, PARIS, FRANCE	-71.9%	2,700,000	9,600,000	P
2	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	-78.3%	1,600,000	7,390,000	F
3	VATICAN MUSEUMS, VATICAN, VATICAN CITY	-81.1%	1,300,000	6,883,000	P
4	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	-83.4%	1,125,000	6,770,000	P
5	BRITISH MUSEUM, LONDON, U.K.	-79.5%	1,275,000	6,208,000	F
6	TATE MODERN, LONDON, U.K.	-76.5%	1,433,000	6,098,000	F
7	NATIONAL GALLERY, LONDON, U.K.	-80.1%	1,197,000	6,011,000	F
8	NATURAL HISTORY MUSEUM, LONDON, U.K.	-77.9%	1,197,000	5,424,000	F
9	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	n/a	n/a	5,000,000	P
10	STATE HERMITAGE, ST PETERSBURG, RUSSIA	-78.8%	969,000	4,957,000	P

2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

2019 RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2020	ATTENDANCE 2019 FREE/PAID
11	SHANGHAI SCIENCE AND TECHNOLOGY MUSEUM, SHANGHAI, CHINA	-72.0%	1,351,000	4,824,000 (P)
12	REINA SOFÍA, MADRID, SPAIN	-71.8%	1,248,000	4,426,000 (F)
13	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, D.C., U.S.	-86.4%	573,000	4,200,000 (F)
14	NANJING MUSEUM, NANJING, CHINA	-63.7%	1,515,000	4,169,000 (F)
15	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-73.3%	1,108,000	4,150,000 (F)
16	NATIONAL GALLERY OF ART, WASHINGTON, D.C., U.S.	-82.1%	730,000	4,074,000 (F)
17	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	-77.8%	872,000	3,921,000 (P)
18	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	-82.3%	690,000	3,891,000 (P)
19	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	-83.2%	643,000	3,832,000 (P)
20	MUSÉE D'ORSAY, PARIS, FRANCE	-76.3%	867,000	3,652,000 (F)
TOP 20 TOTAL ATTENDANCE 2020			22,393,000	105,480,000
TOP 20 ATTENDANCE CHANGE 2019-20			-77.7%	22,393,000 105,480,000

© 2020 TEA / AECOM

-77.7%

Top 20 amusement/theme parks worldwide attendance change 2019-20

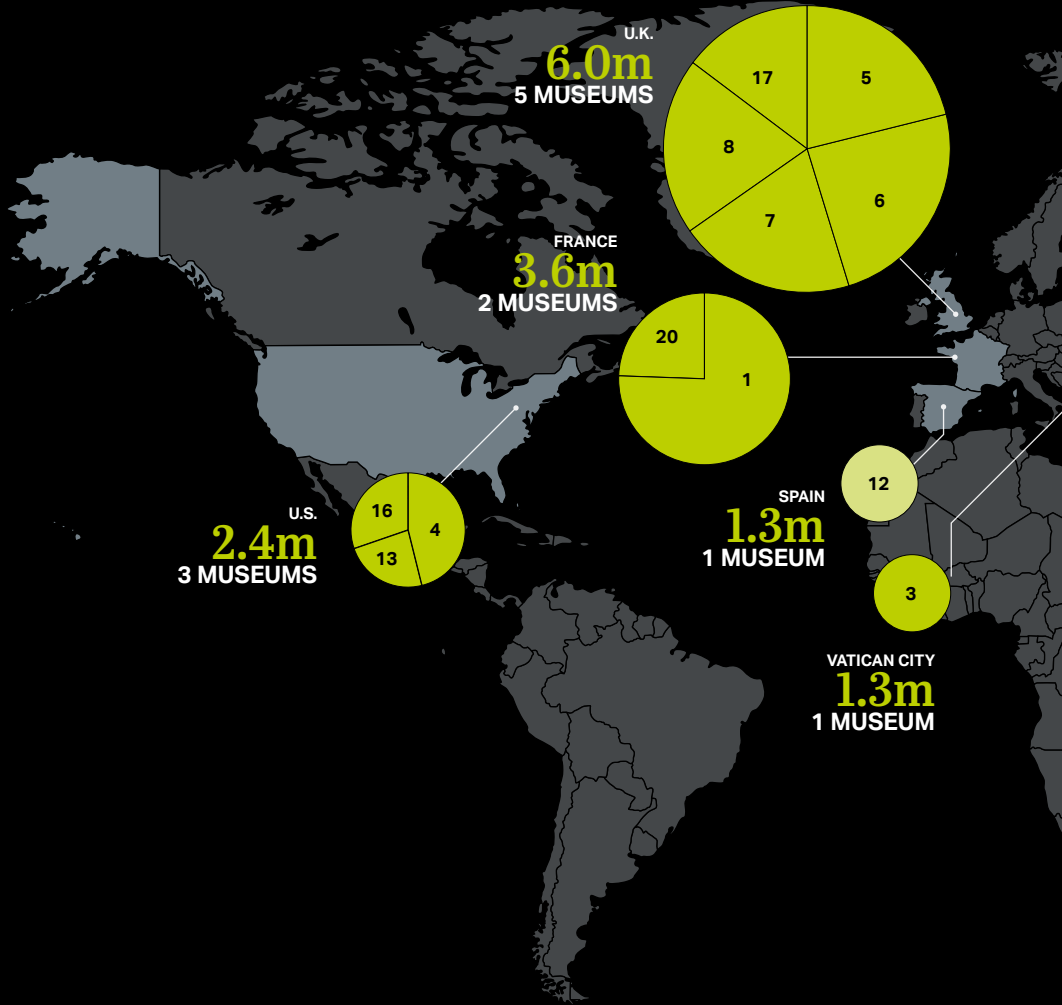
22.4m

Top 20 museums worldwide attendance 2020

105.5m

Top 20 museums worldwide attendance 2019

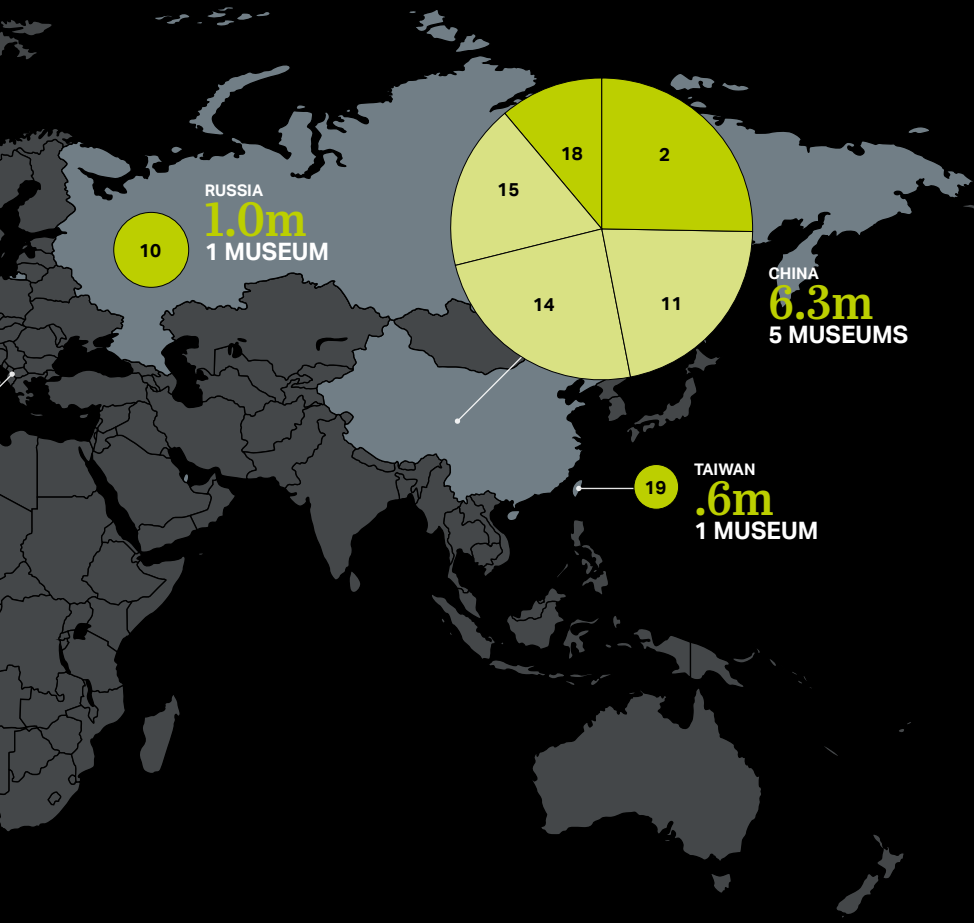
Top 20 Museums Worldwide



Key

- 0—24.9%
- 25%—49.9%
- 50%—74.9%
- >75%

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.



-77.7%

Top 20 amusement/theme parks worldwide attendance change 2019-20

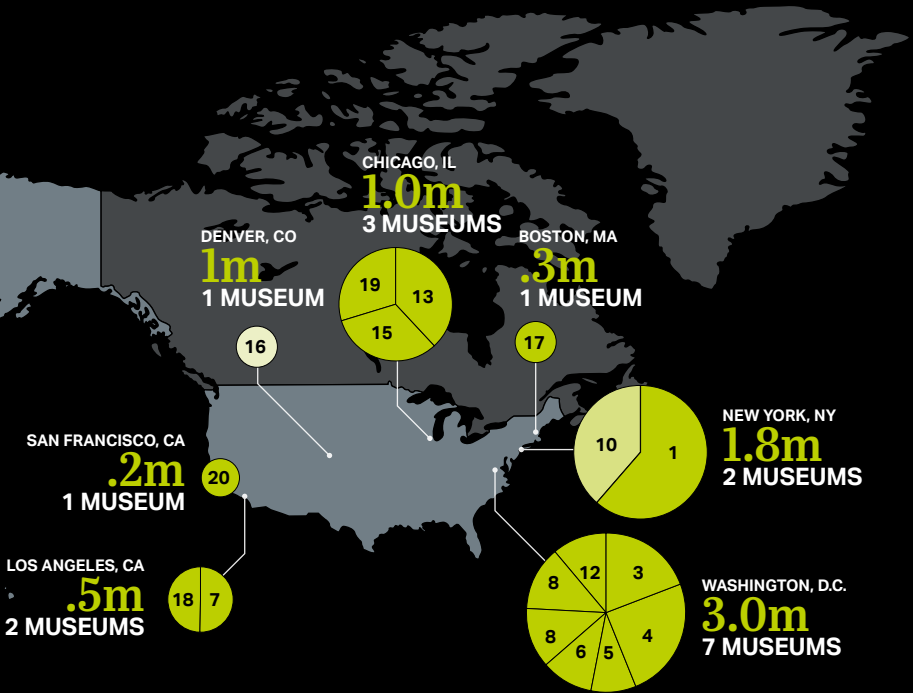
22.4m

Top 20 amusement/theme parks worldwide attendance 2020

253.7m

Top 20 amusement/theme parks worldwide attendance 2019

Top 20 Museums North America



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019	FREE/PAID
1	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	-83.4%	1,125,000	6,770,000	P
2	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	n/a	n/a	5,000,000	P
3	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC, U.S.	-86.4%	573,000	4,200,000	F
4	NATIONAL GALLERY OF ART, WASHINGTON, DC, U.S.	-82.1%	730,000	4,074,000	F
5	NATIONAL AIR AND SPACE MUSEUM, WASHINGTON, DC, U.S.	-91.7%	267,000	3,200,000	F
6	NATIONAL MUSEUM OF AMERICAN HISTORY, WASHINGTON, DC, U.S.	-88.9%	311,000	2,800,000	F
7	CALIFORNIA SCIENCE CENTER, LOS ANGELES, CA, U.S.	-87.7%	271,000	2,200,000	P
8	NATIONAL MUSEUM OF AFRICAN AMERICAN HISTORY AND CULTURE, WASHINGTON, DC, U.S.	-81.6%	368,000	2,000,000	F
	SMITHSONIAN AMERICAN ART MUSEUM (WITH THE RENWICK GALLERY), WASHINGTON DC, U.S.	-80.7%	387,000	2,000,000	F
10	THE MUSEUM OF MODERN ART, NEW YORK, NY, U.S.	-64.6%	706,000	1,992,000	P
11	HOUSTON MUSEUM OF NATURAL SCIENCE, HOUSTON, TX, U.S.	n/a	n/a	1,974,000	F
12	NATIONAL PORTRAIT GALLERY, WASHINGTON, DC, U.S.	-81.1%	321,000	1,700,000	F
13	THE ART INSTITUTE OF CHICAGO, CHICAGO, IL, U.S.	-77.5%	375,000	1,666,000	P
14	U.S. HOLOCAUST MEMORIAL MUSEUM, WASHINGTON, DC, U.S.	n/a	n/a	1,600,000	P
15	FIELD MUSEUM OF NATURAL HISTORY, CHICAGO, IL, U.S.	-78.8%	316,000	1,494,000	P
16	DENVER MUSEUM OF NATURE & SCIENCE, DENVER, CO, U.S.	-33.4%	991,000	1,487,000	P
17	MUSEUM OF SCIENCE, BOSTON, MA, U.S.	-76.3%	345,000	1,458,000	P
18	THE J. PAUL GETTY CENTER, LOS ANGELES, CA, U.S.	-81.4%	267,000	1,439,000	F
19	MUSEUM OF SCIENCE AND INDUSTRY, CHICAGO, IL, U.S.	-79.0%	291,000	1,388,000	P
20	CALIFORNIA ACADEMY OF SCIENCES, SAN FRANCISCO, CA, U.S.	-81.8%	240,000	1,321,000	P
TOP 20 TOTAL ATTENDANCE 2020			7,884,000	49,763,000	
TOP 20 TOTAL ATTENDANCE CHANGE 2019-20			-80.9%	7,884,000	49,763,000

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-80.9%

Top 20 museums North America attendance change 2019–20

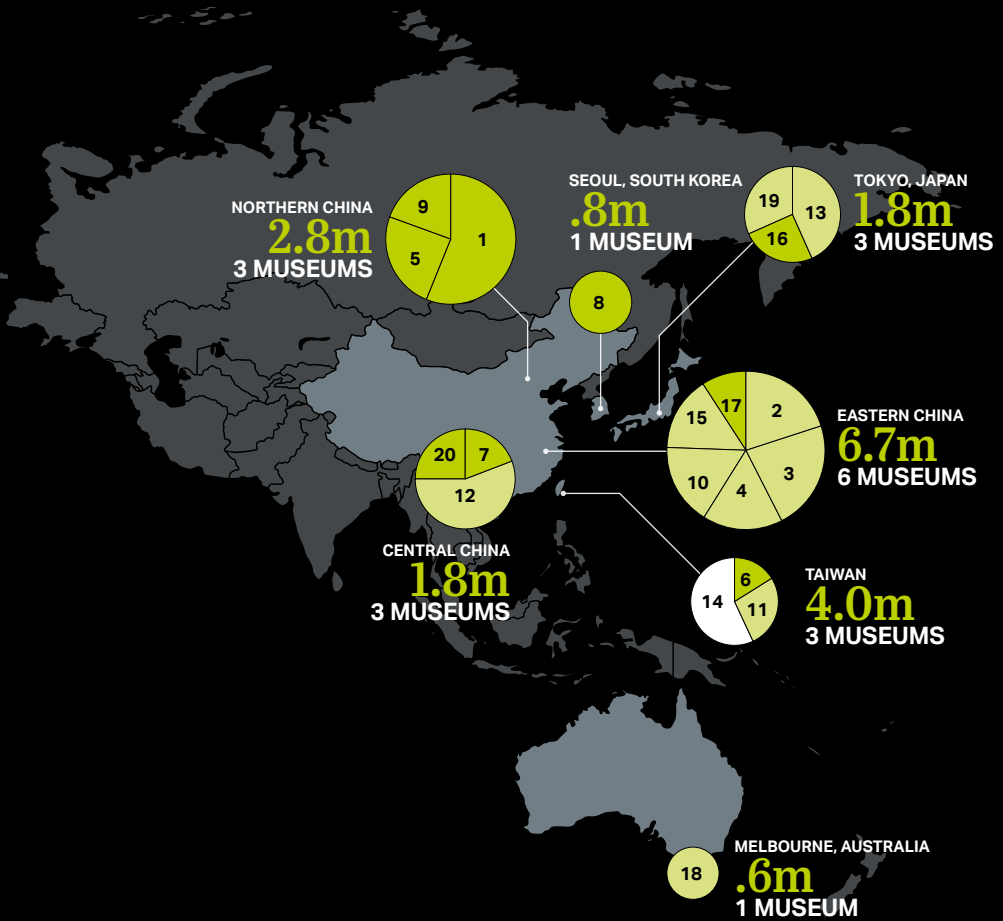
7.9m

Top 20 museums North America attendance 2020

49.8m

Top 20 museums North America attendance 2019

Top 20 Museums Asia-Pacific



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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	ATTENDANCE 2020	ATTENDANCE 2019	FREE/PAID
1	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	-78.3%	1,600,000	7,390,000	(F)
2	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, SHANGHAI, CHINA	-72.0%	1,351,000	4,824,000	(P)
3	NANJING MUSEUM, NANJING, CHINA	-63.7%	1,515,000	4,169,000	(F)
4	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-73.3%	1,108,000	4,150,000	(F)
5	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	-82.3%	690,000	3,891,000	(P)
6	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	-83.2%	643,000	3,832,000	(P)
7	XIAN MUSEUM, XIAN, CHINA	-89.8%	348,000	3,420,000	(F)
8	NATIONAL MUSEUM OF KOREA, SEOUL, SOUTH KOREA	-76.9%	774,000	3,354,000	(F)
9	TIANJIN NATURAL HISTORY MUSEUM, TIANJIN, CHINA	-82.5%	550,000	3,150,000	(F)
10	HUNAN MUSEUM, CHANGSHA, CHINA	-64.0%	1,130,000	3,140,000	(F)
11	NATIONAL TAIWAN SCIENCE EDUCATION CENTER, TAIPEI, TAIWAN	-63.9%	1,082,000	3,000,000	(P)
12	SHANXI HISTORY MUSEUM, XIAN, CHINA	-65.5%	1,000,000	2,900,000	(F)
13	TOKYO METROPOLITAN ART MUSEUM, TOKYO, JAPAN	-82.3%	510,000	2,874,000	(P)
14	NATIONAL MUSEUM OF NATURAL SCIENCE, TAICHUNG, TAIWAN	-14.6%	2,263,000	2,650,000	(P)
15	SHANGHAI NATURAL HISTORY MUSEUM, SHANGHAI, CHINA	-59.2%	1,040,000	2,549,000	(P)
16	NATIONAL MUSEUM OF NATURE AND SCIENCE, TOKYO, JAPAN	-76.4%	580,000	2,460,000	(P)
17	ZHEJIANG MUSEUM OF NATURAL HISTORY, HANGZHOU, CHINA	-75.4%	600,000	2,443,000	(P)
18	NATIONAL GALLERY OF VICTORIA, MELBOURNE, AUSTRALIA	-73.8%	637,000	2,433,000	(F)
19	TOKYO NATIONAL MUSEUM, TOKYO, JAPAN	-70.2%	725,000	2,431,000	(F)
20	HUBEI PROVINCIAL MUSEUM, WUHAN, CHINA	-81.4%	446,000	2,400,000	(F)
TOP 20 TOTAL ATTENDANCE 2020			18,592,000	67,460,000	
TOP 20 TOTAL ATTENDANCE CHANGE 2019-20			-72.4%	18,592,000	67,460,000

© 2020 TEA / AECOM

-72.4%

Top 20 museums Asia-Pacific attendance change 2019-20

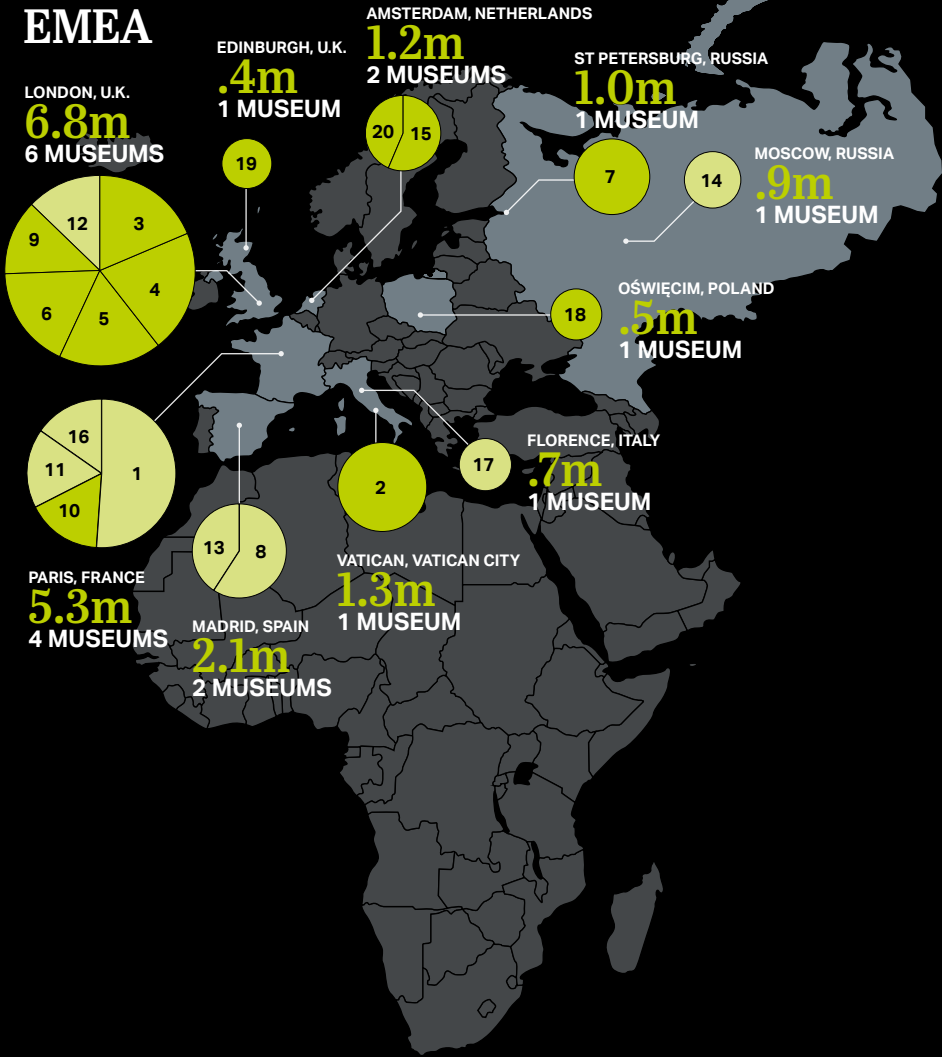
18.6m

Top 20 museums Asia-Pacific attendance 2020

67.5m

Top 20 museums Asia-Pacific attendance 2019

Top 20 Museums EMEA



2020 attendance declines were largely due to agency restrictions limiting operating days and capacities in the COVID-19 pandemic. Therefore, we have kept the 2019 rankings in place for the 2020 report.

Key

- 0—24.9%
- -25%—49.9%
- 50%—74.9%
- >-75%

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.

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4	TATE MODERN, LONDON, U.K.	-76.5%	1,433,000	6,098,000	F
5	NATIONAL GALLERY, LONDON, U.K.	-80.1%	1,197,000	6,011,000	F
6	NATURAL HISTORY MUSEUM, LONDON, U.K.	-77.9%	1,197,000	5,424,000	F
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9	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	-77.8%	872,000	3,921,000	F
10	MUSÉE D'ORSAY, PARIS, FRANCE	-76.3%	867,000	3,652,000	F
11	CENTRE POMPIDOU, PARIS, FRANCE	-72.1%	913,000	3,270,000	P
12	SCIENCE MUSEUM (SOUTH KENSINGTON), LONDON, U.K.	-73.5%	862,000	3,254,000	P
13	MUSEO NACIONAL DEL PRADO, MADRID, SPAIN	-73.4%	852,000	3,203,000	P
14	STATE TRET'YAKOV GALLERY, MOSCOW, RUSSIA	-68.5%	894,000	2,836,000	P
15	RIJKSMUSEUM, AMSTERDAM, THE NETHERLANDS	-75.0%	675,000	2,700,000	P
16	CITE DES SCIENCES ET DE L'INDUSTRIE, PARIS, FRANCE	-66.5%	793,000	2,370,000	P
17	GALLERIA DEGLI UFFIZI, FLORENCE, ITALY	-72.1%	659,000	2,362,000	P
18	AUSCHWITZ-BIRKENAU MUSEUM, OŚWIĘCIM, POLAND	-78.2%	502,000	2,300,000	P
19	NATIONAL MUSEUM OF SCOTLAND, EDINBURGH, U.K.	-79.9%	444,000	2,210,000	F
20	VAN GOGH MUSEUM, AMSTERDAM, THE NETHERLANDS	-75.4%	517,000	2,100,000	P
TOP 20 TOTAL ATTENDANCE 2020			20,169,000	83,785,000	
TOP 20 TOTAL ATTENDANCE CHANGE 2019-20			-75.9%	20,169,000	83,785,000

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-75.9%

Top 20 museums EMEA attendance change 2019-20

20.2m

Top 20 museums EMEA attendance 2020

83.8m

Top 20 museums EMEA attendance 2019

About the Study

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

This is the fifteenth 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, AECOM



Judith Rubin
Editor,
TEA/AECOM Theme Index

John Robinett and Judith Rubin have worked together on every edition of the TEA/AECOM Theme Index since 2006 — for as long as the Themed Entertainment Association and the Economics practice at AECOM have been collaborating to produce the annual attendance study. They have both been honored with the TEA Peter Chernack Distinguished Service Award, recognizing exceptional service to the attractions industry community.

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 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 2020 version of the report; AECOM has reported 2020 attendance estimates for the top theme and water parks included in the 2019 version. Where park attendance was not provided by operators, AECOM conducted analysis regarding park operating days, regulatory agency operating guidelines, visitor participation trends, and local market considerations to help inform park estimates.
- Similar to theme parks, museum attendance was also primarily driven by public regulatory agency regulations affecting closures and capacity restrictions. As indoor attractions, they were often subject to much stricter regulations than theme parks. Since attendance was largely driven

by these external factors, we have also not ranked museums by attendance this year, but rather, reported 2020 attendance for the top 20 museums from 2019. A few museums did not have data available, and attendance have not been estimated.

- We start by reviewing publicly available information about the performance of the multi-park/attraction operators and also the individual parks/museums. We also review information that we have collected as part of the previous year's report and throughout the year.
- Where park/museum-level information is missing, the multi-park operators and the individual parks/museums are asked to provide their attendance figures, and many of them do so directly.
- Where specific park/museum-level figures are not received from the operator, AECOM researchers use a detailed methodology that considers the following: historic attendance trends at the park/museum; generally available information on the park/museum and/or operator; park/museum changes, such as new rides, areas, shows, exhibits, ticket prices, intellectual property connections, etc.; general economy of the nation and the specific metropolitan area; tourism trends nationally and in the metropolitan area; for parks, weather trends in the area, particularly during peak periods; the performance of nearby parks/museums and other attractions; media coverage about the operator/park/museum; and select factors as relevant.
- Park/museum operators are also given the opportunity to review and comment on AECOM's estimate before the Theme Index and Museum Index are finalized and published. Of those that don't provide official figures at the park/museum level, the research team generally receives some form of feedback regarding the individual parks/museums. Leadership

at TEA (the Themed Entertainment Association, which publishes and helps edit the report) plays an important role here, encouraging responses.

- As the leading provider of business planning studies worldwide for attractions, AECOM's group also works frequently with all of the major operators, parks and museums, providing the AECOM team the opportunity to periodically compare estimates with actual exact figures. They are used to refine the methodology where necessary.
- As part of its active work in these markets and to maintain awareness of what drives performance and the macroeconomics of different countries, members of the research group visit the parks and museums, watching for new development and trends. This helps to bring professional processes to the industry so that a higher level of quality can be transmitted from more developed markets into emerging markets. AECOM consultants frequently work for operators who are looking to enter the attractions business, or to grow or improve their existing operations. They also team with attraction master planners and designers to help correctly position and right-size parks and museums to match their market potential and optimize their financial performance. In addition, they regularly speak at industry events, such as those organized by TEA, IAAPA, WWA, AAM, AZA, ULI, and many others, about industry trends, and also contribute to articles to industry publications and in more general media publications.

How is a water park defined for the purposes of the Theme Index?

A water park must have a minimum of three water slides / flumes, a wave pool, retail and food areas, and at least two of the following other elements: tube rides; free-form pool; lazy river; and kids' water play area. In Asia and America, the water parks are defined as outdoor facilities. If a water park also has a

separate spa facility, only the entertainment-related attendance is factored into our study.

Why aren't other attraction types included, such as zoos and aquariums, observation experiences, and sports and performance venues?

The report has evolved over the years, starting as just a report on major U.S. theme parks, with additional regions (EMEA, Asia, Latin America) and attraction types (water parks, museums) added over time. That said, we are indeed considering additional attraction types and will include these as interest is shown and resources allow.

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

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

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

Generally, the answer is yes, with attractions of all types and scales facing many of the same ongoing challenges, which include meeting visitor expectations, hiring and retaining good management and staff, efficient operations, understanding and applying new technology, addressing the need for continuous reinvestment, and the like. That said, smaller and more regional venues have their own unique place in the market. They have distinct challenges when it comes to marketing,

investment and guest retention, making the most of smaller budgets, and differentiating themselves from other leisure options competing for visitors' time and money. How they respond to those challenges often sets an example of creativity, innovation, leadership and/or economic stimulus that influences the rest of the sector — many such examples have appeared in the annual slate of TEA Thea Awards recipients over the years.

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

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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. 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.

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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:

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