

THEME INDEX MUSEUM INDEX 2023

GLOBAL ATTRACTIONS ATTENDANCE REPORT



Cover image:

SeaWorld Abu Dhabi opened in 2023 on Yas Island, the first SeaWorld location outside of the U.S.

Image credit: © United Parks & Resorts

Opposite page:

An artist's rendering of Dark Universe, the monster-themed land currently under construction at Universal Epic Universe in Orlando, Florida

© Universal Destinations & Experiences

Credits

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**THEME
INDEX
MUSEUM
INDEX 2023**

Global Attractions Attendance Report

The definitive annual attendance study for the themed entertainment and museum industries

Published by the Themed Entertainment Association (TEA) and AECOM Economics & Advisory



Contents

- 6 Foreword
- 8 The Big Picture
- 22 The Americas
- 38 Asia-Pacific
- 50 EMEA
- 60 Museums
- 82 About The Study

A MESSAGE FROM OUR PRESENTING PARTNER



Benchmark: a standard or point of reference against which things may be compared or assessed

The TEA/AECOM Theme Index and Museum Index, now proudly presented in partnership with Storyland Studios, has been a longstanding source of themed entertainment industry data. This annual publication is a pillar of industry benchmarking, providing insights and analysis of the global market, and is leveraged by operators, investors, and management consulting firms around the world. In no other medium will you find a collection of data that enables you to measure the success, opportunities, and trends of the industry in a single place.

The global theme park and museum industry has demonstrated remarkable resilience and adaptability amidst various challenges in 2023. In the face of weather anomalies, ongoing supply chain issues, and elevated inflation, the industry's ability to innovate through broad market offerings, intelligent automation, and activation of intellectual property underscores the ability of our location-based experience economy to maintain profitability, even in the face of fluctuating visitor numbers.

This year's report reflects the industry's dynamic nature and its capacity to adapt, innovate, and thrive in the face of all challenges. As the industry continues to move forward from the Covid-19 pandemic, the continued emphasis on enhancing guest experiences, strategic investments, and leveraging IP - both evergreen and emerging - will be pivotal in sustaining growth and success across the global theme park and museum landscape.

This invaluable (and free!) resource continues to be the ultimate source of theme park and museum data available to the public. It is an honor to present the 2023 TEA / AECOM Theme Index and Museum Index in partnership with these two excellent organizations.



BEN THOMPSON
Chief Strategy Officer
STORYLAND STUDIOS

“ In no other medium will you find a collection of data that enables you to measure the success, opportunities, and trends of the industry in a single place. ”



From top to bottom
Storyville Gardens: an immersive, interactive theme park featuring beloved stories from around the world
Porto Boega: a world-class resort, working in harmony with the local culture, community, and environment
Kebulania: a first-of-its-kind film city in Lagos, Nigeria
 All images credited to Storyland Studios

Onward & Upward

With the pandemic firmly in the past, a stabilized global attractions industry moves towards future development

The year 2023 marked a turning point for the global attractions industry. With pandemic-related operating restrictions essentially gone, theme parks, water parks and museums were able to turn their attention from recovery and focus on the future. During the pandemic, the industry made big strides toward stabilization as operators harnessed the very creative energy and ingenuity that are hallmarks of this industry, activating plans to safely reopen and developing strategies to entice guests to return.

To better capture and identify that process, we froze our ranking lists from 2019 for the 2020, 2021 and 2022 reports. In essence, our 2019 list was a control set that we followed during the recovery period. This year is the right time to return to our normal process of ranking. Every region has approached or exceeded 2019 figures, and if we look at an average of attendance leading up to the pandemic, the industry has basically returned to its pre-pandemic position.

That's not to say things are the same. This report identifies the start of some global shifts for the industry, and while the effects of the pandemic might be behind us, socio-political events could bring further change. And for those institutions that have not seen a full recovery, many are beginning to ask: Is this the new normal?



Francisco Refuerzo

Senior Analyst,
AECOM Economics + Advisory

THE BIG PICTURE



Chimelong Spaceship,
Zhuhai, China.
Image credit: © Chimelong Group



A parade at Disneyland Park.
Anaheim, California
Image credit: © Disney

Global Attendance Trends

The museum market is perhaps seeing the most dramatic change, as the well-established European institutions are starting to be eclipsed by new facilities in Asia. China's strong push for education has resulted in a wealth of new museums, and the country's large population centers combined with free admission are a recipe for big attendance. North America's museums were relatively slow to recover, but a large number are in the midst of massive reinvestment campaigns, upgrading exhibits and facilities with an eye towards more engaging experiences - all in an effort to compete for visitors' time, attention and money.

On the theme park side, there aren't as many surprises. Notably, the first Middle East theme park makes our global list with the entry of Warner Bros. World Abu Dhabi.

244.6m

Top 25 theme parks worldwide attendance 2023

198.7m

Top 25 theme parks worldwide attendance 2022

Neighboring park SeaWorld Abu Dhabi opened to international acclaim midway through 2023, and if it continues on its current attendance trajectory, will easily place in our 2024 list as well.

Elsewhere, European parks performed exceptionally well while parks in the Americas experienced more modest growth. Generally, parks that invested regularly throughout the pandemic years tended to perform better over time. Asian parks, most drastically affected by pandemic restrictions, showed great year-over-year rebounds but it remains to be seen if the great growth of the Asian market that we saw pre-pandemic will continue in coming years.

On the operator front, China's Fantawild has moved into the #2 spot on our top operators

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Every region has approached or exceeded 2019 figures, and if we look at an average of attendance leading up to the pandemic, the industry has basically returned to its pre-pandemic position.

”



The Tropical Rain Forest Greenhouse at the National Museum of Natural Science.
Taichung, Taiwan
Image credit: Sean Hsu / Alamy Stock Photo



Boardwalk at Knott's Berry Farm.
Buena Park, California
Image credit: © Six Flags Entertainment Corporation

“

Generally, parks that invested regularly throughout the pandemic years tended to perform better over time.

”

list. Their “asset light” model relies on government entities to fund new parks while Fantawild operates them. They opened an impressive 10 new parks between 2020 and 2023, with further growth expected. In the U.S., Six Flags and Cedar Fair completed a merger in 2024. The newly formed company has a combined portfolio of 27 amusement parks and 15 water parks across 18 states, Canada, and Mexico. They are now the largest regional amusement park operator in the Americas by number of parks, and have a combined 2023 attendance that would rank fifth in the world.

Water parks remain generally solid and reliable around the world. Although indoor water parks were disproportionately impacted by the pandemic, most water parks draw from a more local market and were less impacted by travel restrictions.

“

Looking to 2024 and beyond, things look positive for the industry. Many facilities have succeeded in regaining market share while managing to increase per-capita spending as well.

”

Latin American and EMEA water parks did especially well in 2023. In the EMEA region, this was helped by increased attendance in Dubai and two new entries: Rulantica at Europa-Park and Therme Bucharest. In Latin America, water park operators made significant investments to expand and improve existing water parks, continuing the market's third year of double-digit attendance growth.

Looking to 2024 and beyond, things look positive for the industry. Many facilities have succeeded in regaining market share while managing to increase per-capita spending as well. Whether or not there's an upper limit to that trend remains to be seen, but for the time being, theme parks, water parks and museums around the world have much to look forward to.

A 40-foot inflatable panda bear greets visitors at Everland Park.

Yongin, South Korea
Image credit: © Newsis



On Trend: Wellbeing in focus at thermal attractions

A new sub-sector called wellbeing attractions caters to the rising demand for health and wellness alongside leisure facilities, whereby thermal bathing and other wellbeing experiences feature as an integral part of the product offering. The recent explosion of wellbeing attractions is a “new-old” trend, drawing on traditional bath house concepts common in Europe during Roman times and public bathhouses or sento that have long been central in Asian cultures.

In many cases, wellbeing attractions are becoming new social wellness hubs for day visitors, integrating mixed use leisure, hospitality, F&B and wellness concepts. Some feature both family friendly attractions and rides, as well as adults-only areas that focus on balneotherapy, hydrotherapy and saunas. Some of these larger-format attractions offer daily attendance hybrid water park / thermal bathing experiences combined with overnight accommodation, such as Therme Erding and Tropical Islands.

Therme Group, a global developer founded in 2011, has built on that market trend with

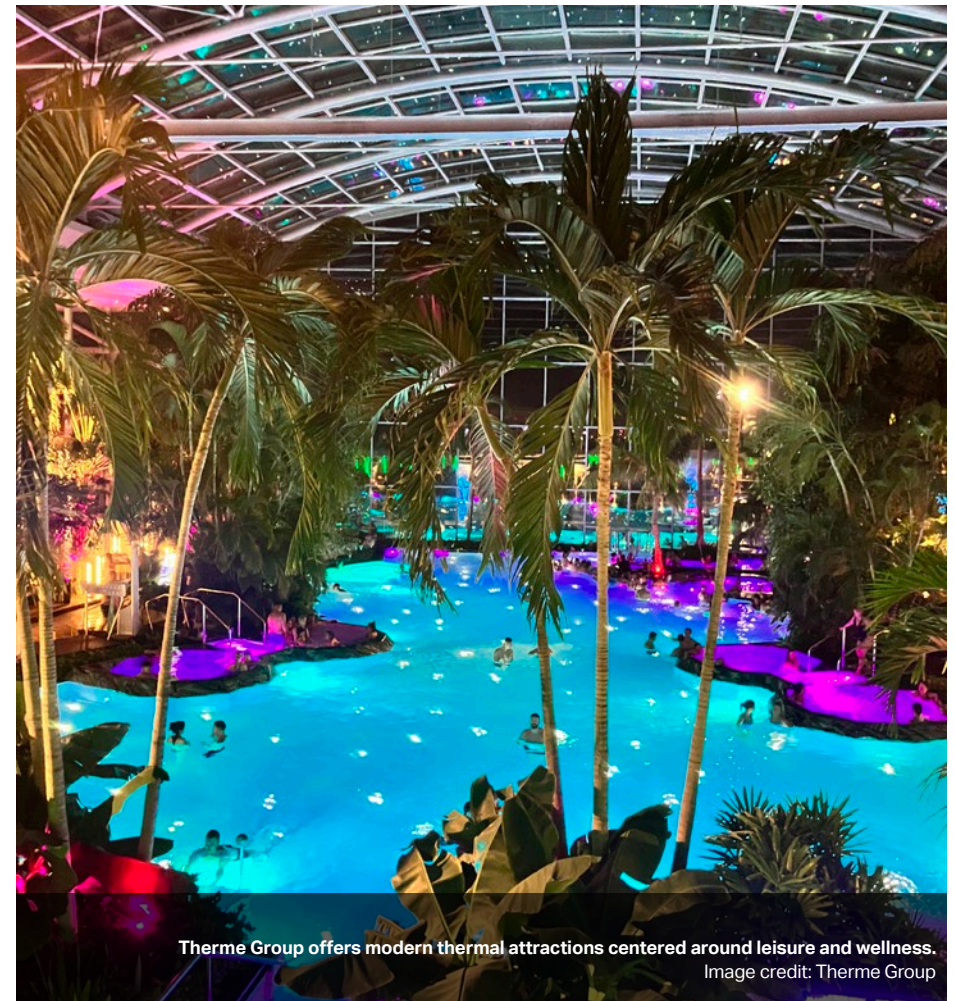
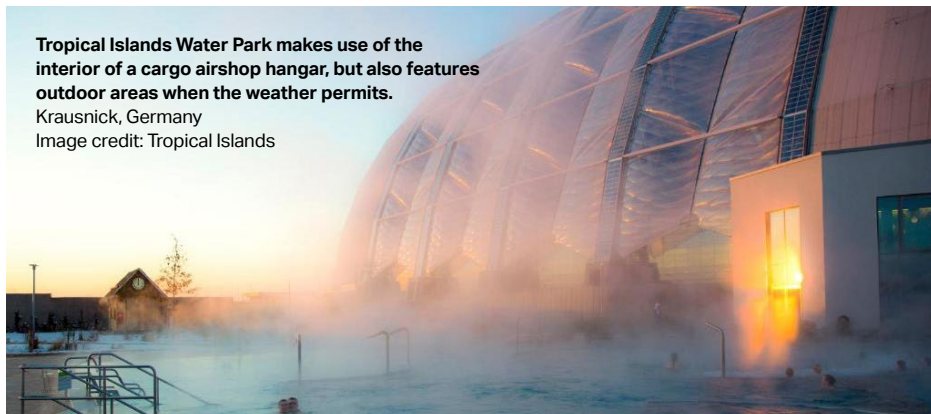
two contemporary facilities, Therme Erding and Therme Bucharest. Both are featured on our top EMEA water parks list. Therme Group is currently developing a number of projects around the world that integrate immersive communal experiences, high quality healthy dining, sauna rituals, water slides, and live performances. The company’s ambitious expansion strategy includes plans for new locations across the U.K., Asia, and North America. The focus is on offering “affordable wellness for all.”

While North America has been an innovator when it comes to water parks and themed entertainment, the region is playing catch-up when it comes to wellbeing attractions. Meow Wolf co-founder Corvas Brinkerhoff is developing an immersive spa named Submersive in Austin, Texas. The 25,000-square-foot wellness facility will incorporate immersive art, video projections, lasers, and AI technology. Slated to launch an initial phase in 2026 with full completion in 2028, Submersive aims to redefine the bathing experience by combining immersive art, neuroscience, and social bathing.

Thank you to Adam Bamba Tanaka and Mariana Sucui at Therme Group for their support on this trend feature.

Tropical Islands Water Park makes use of the interior of a cargo airship hangar, but also features outdoor areas when the weather permits.

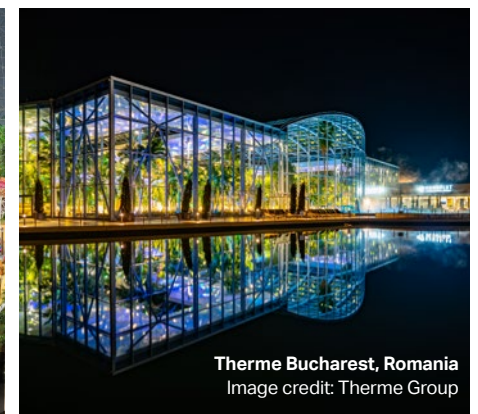
Krausnick, Germany
Image credit: Tropical Islands



Therme Group offers modern thermal attractions centered around leisure and wellness.
Image credit: Therme Group



Tropical Islands Water Park. Krausnick, Germany
Image credit: dpa picture alliance / Alamy Stock Photo



Therme Bucharest, Romania
Image credit: Therme Group

Hacienda Nápoles' Mundo Pangea at nighttime. Parque Temático Hacienda Nápoles
 Puerto Triunfo, Antioquia, Colombia
 Image credit:
 © Parque Temático Hacienda Nápoles



Artist rendering of Celestial park , currently under construction at Universal Epic Universe
 Orlando, Florida
 Image credit: © Universal Destinations & Experiences

Top 10 Amusement/Theme Park Operators Worldwide

2023 RANK	OPERATOR	% CHANGE 2022-2023	ATTENDANCE (in thousands)		
			2023	2022	
1	DISNEY EXPERIENCES	17%	142,083	121,027	
2	FANTAWILD GROUP	111%	85,690	40,530	
3	MERLIN ENTERTAINMENTS GROUP	13%	62,100	55,100	
4	UNIVERSAL DESTINATIONS & EXPERIENCES	18%	60,810	51,380	
5	CHIMELONG GROUP	148%	36,090	14,540	
6	HAPPY VALLEY GROUP CHINA	57%	35,710	22,710	
7	CEDAR FAIR ENTERTAINMENT COMPANY	-1%	26,700	26,887	
8	SIX FLAGS INC.	8%	22,206	20,471	
9	UNITED PARKS & RESORTS	-2%	21,606	21,940	
10	PARQUES REUNIDOS	5%	19,340	18,500	
TOP 10 TOTAL ATTENDANCE			30%	512,335	393,085

© 2024 TEA / AECOM

30%

Top 10 theme park operator groups worldwide change 2022-23

512.3m

Top 10 theme park operator groups worldwide attendance 2023

393.1m

Top 10 theme park operator groups worldwide attendance 2022

Top 25 Amusement/Theme Parks Worldwide

2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL	3.4%	17,720	17,133
2	DISNEYLAND PARK, ANAHEIM, CA	2.2%	17,250	16,881
3	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	29.6%	16,000	12,350
4	TOKYO DISNEYLAND, TOKYO, JAPAN	25.8%	15,100	12,000
5	SHANGHAI DISNEYLAND, SHANGHAI, CHINA	164.2%	14,000	5,300
6	CHIMELONG OCEAN KINGDOM, ZHUHAI, CHINA	184.5%	12,520	4,400
7	TOKYO DISNEYSEA, TOKYO, JAPAN	22.8%	12,400	10,100
8	EPCOT AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL	19.8%	11,980	10,000
9	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	4.7%	10,400	9,930
10	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL	-5.5%	10,300	10,900
11	UNIVERSAL ISLANDS OF ADVENTURE AT UNIVERSAL ORLANDO, FL	-9.3%	10,000	11,025
11	DISNEY CALIFORNIA ADVENTURE PARK, ANAHEIM, CA	11.1%	10,000	9,000

2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
13	UNIVERSAL STUDIOS FLORIDA AT UNIVERSAL ORLANDO, FL	-9.3%	9,750	10,750
14	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA	15.0%	9,660	8,400
15	UNIVERSAL STUDIOS BEIJING, BEIJING, CHINA	109.3%	9,000	4,300
16	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL	-2.8%	8,770	9,027
17	HONG KONG DISNEYLAND, HONG KONG SAR	88.2%	6,400	3,400
18	EUROPA-PARK, RUST, GERMANY	11.1%	6,000	5,400
19	EVERLAND, GYEONGGI-DO, SOUTH KOREA	1.9%	5,880	5,770
20	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	6.7%	5,700	5,340
21	CHIMELONG PARADISE, GUANGZHOU, CHINA	142.6%	5,580	2,300
22	DE EFFEELING, KAATSHEUVEL, NETHERLANDS	2.4%	5,560	5,430
23	LOTTE WORLD, SEOUL, SOUTH KOREA	14.8%	5,190	4,520
24	ZIGONG FANTAWILD DINO KINGDOM, ZIGONG, CHINA	177.9%	4,860	1,749
25	MIANYANG FANTAWILD ORIENTAL HERITAGE, MIANYANG, CHINA	76.9%	4,620	2,611
TOP 25 TOTAL ATTENDANCE		23.5%	244,640	198,016
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*		23.1%	244,640	198,696

© 2024 TEA / AECOM

23%

Top 25 amusement/theme parks worldwide attendance change 2022–23*

244.6m

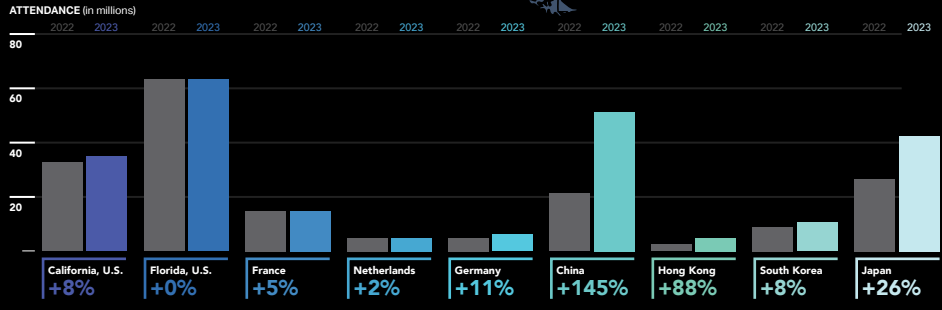
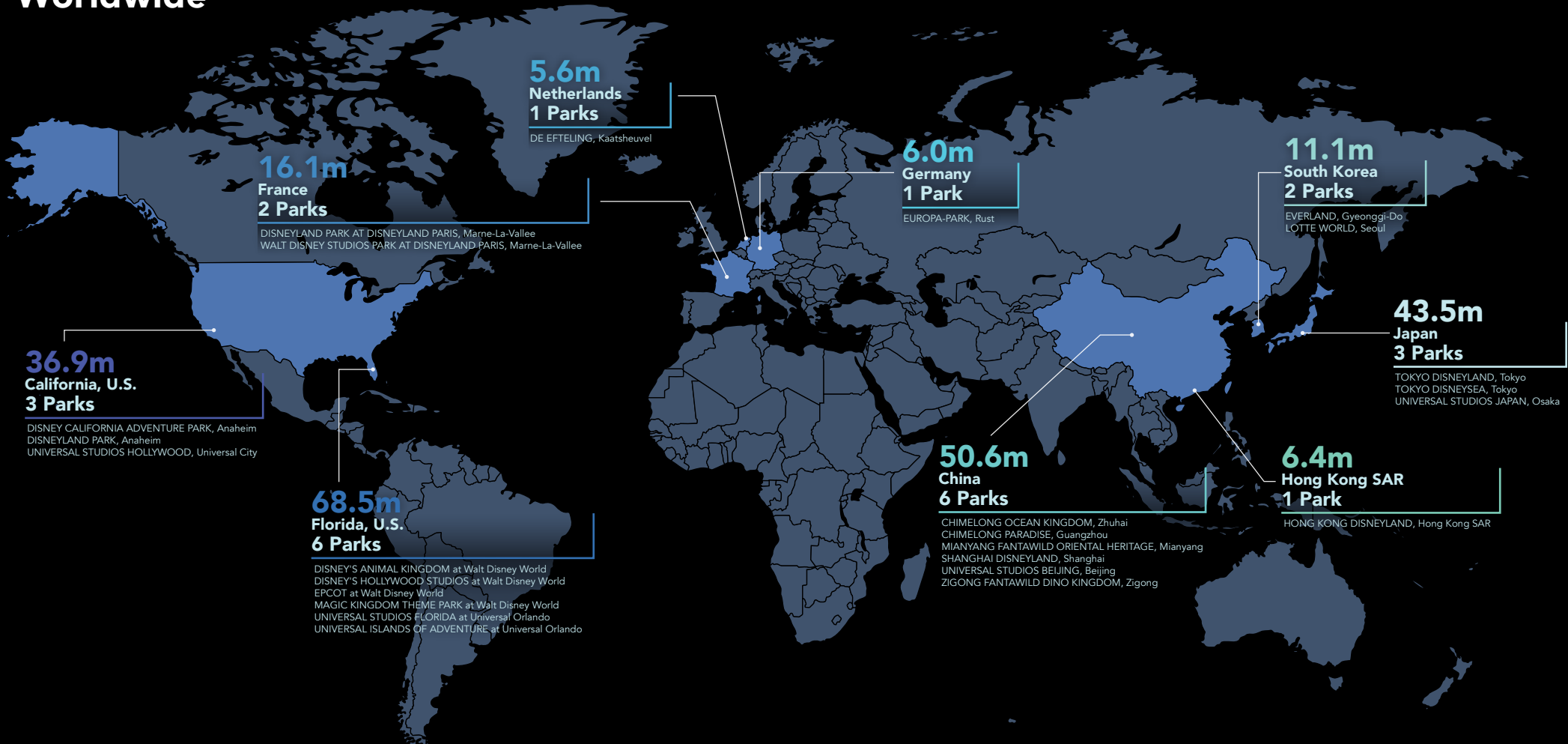
Top 25 amusement/theme parks worldwide attendance 2023

198.7m

Top 25 amusement/theme parks worldwide attendance 2022

*Estimated total attendance from the Top 25 parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Top 25 Amusement/Theme Parks Worldwide



23%

Top 25 amusement/theme parks worldwide attendance change 2022-23*

244.6m

Top 25 amusement/theme parks worldwide attendance 2023

198.7m

Top 25 amusement/theme parks worldwide attendance 2022*

*Change in attendance is calculated using the total attendance of the top parks listed in this year's list (2023) and the estimated total attendance of the top parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Sometimes less is more

Attendance to North American theme parks was a mixed bag in 2023, but operators delivered with strong underlying metrics, demonstrating newfound resilience in light of new challenges, and with an eye towards the future

In stark contrast with the rest of the world, attendance at North American theme parks was somewhat stagnant for 2023, showing a collective and modest increase of about 3% from 2022. In other time periods a 3% gain in attendance would be applauded, but North American parks fell short of fully regaining their 2019 pre-pandemic attendance. However, most parks fall within the 5-year range preceding the pandemic.

In 2023, only two major operators posted portfolio-wide attendance gains: Disney and Six Flags. For the latter, it was something of a reversal of fortunes. Six Flags posted poor attendance numbers in 2022 while other operators experienced significant attendance gains, making it hard to top in 2023. Much of this was likely tied to predicted declines in levels of pent-up demand, slower than expected return of international visitors, and the timing of and levels of investment in new attractions.



Francisco Refuerzo

Senior Analyst,
AECOM Economics + Advisory

THE AMERICAS



Universal Volcano Bay water park
Orlando, Florida
Image credit:
© Universal Destinations & Experiences

Even though attendance is down across some areas of the region, per capita spending has been steadily increasing, a trend continuing from the first few quarters when parks reopened in the pandemic. Some operators have seen consistent gains. United Parks & Resorts (formerly SeaWorld Parks & Entertainment) had six quarters in a row with record per capita spending, showing that parks can make more money with fewer guests.

The secret seems to be putting focus on the guest experience and finding ways to translate that into more spending. The two tend to go hand in hand. People expect

that if you pay more you will get more, and that if you're getting something better, its cost will also increase. Most of the uptick in spending came from food and beverage. Dining options expanded at all price points, and included options like healthy food, upscale sit-down restaurants, more quick service outlets, and food festival/taste-of-the-world type events.

To be fair, some of this increase likely comes from being in an inflationary market, where operators not only have increased costs to cover, but also an opportunity to pad the price a bit more. Contrary to that notion, the boost in spending is coming

“ **Per capita spending has been steadily increasing, a trend continuing from the first few quarters when parks reopened in the pandemic.** ”



The first Super Nintendo World in the U.S. opened on January 29, 2023 at Universal Studios Hollywood. Image credit: © Universal Destinations & Experiences

not only from increased per bill averages but also from an increased number of transactions – somewhat surprising given the decrease in attendance. Guests are spending more, and more often.

For most parks, ticket prices also increased, though not everywhere. Six Flags drew added attendance by lowering ticket prices and prioritizing season passholders. The bump in attendance helped offset the lower prices and resulted in significant year-over-year revenue increases.

A diverse range of factors

Weather patterns and anomalies are playing a larger role in determining a park's seasonal success. California had an unusually wet winter early in 2023 and that negatively impacted California parks. Texas had

extreme weather events during the summer, including extreme heat and related power grid problems. Canadian forest fires covered wide swaths of the U.S. with hazy smoke and particulate matter that negatively affected attendance at East Coast parks.

To mitigate potential regional problems, one solution is to diversify a park portfolio geographically. The Six Flags and Cedar Fair merger, finalized in 2024, is creating a larger footprint for the company that can help it weather unfavorable conditions in a particular area.

Diversity in audience also makes a difference. Six Flags made a deliberate attempt to invest more heavily in family-friendly activities, while still maintaining their reputation for providing thrill rides. They put renewed focus on their water park products, which tend to appeal more to families. Special event programming has also reflected this ideology. The Fright Fest Halloween event at Six Flags has long



Mickey & Minnie's Runaway Railway debuted at Disneyland Park in Anaheim in 2023 amidst a revamped Mickey's Toontown. Image credit: © Disney

been popular with the teen and young adult market, but their newer Kids Boo Fest expands the holiday's appeal to multi-generational groups.

Operational challenges and trends

On the operations front, inflation and increased costs were cited as concerns from multiple operators. Labor and replacement part costs continued to increase, and some supply chain issues persisted. To address these, some parks turned to automation to reduce the need for staffing. Self-serve kiosks and online ordering were two pandemic-era solutions that gained popularity and became more widespread in the years that followed. Larger chains also tried to flex their pricing muscle when negotiating with food and merchandise vendors.

Halloween events revolutionized the traditional summer theme park calendar and continue to bring in lots of people. Parks are trying to create that same level of

“

Halloween events revolutionized the theme park calendar. Parks are trying to create that same level of demand through other special events held throughout the season.

”

demand through other special events held throughout the season. Some, like spring break events or Winterfests, are tied to certain times of the year. Others, like food and wine festivals, concert series or Pride Days, can be more flexible and slotted in during slower attendance periods.

Intellectual Property (IP) remains an important differentiator for major park chains. As part of its family-friendly push, Six Flags heavily leaned into the DC and Looney Tunes IPs. United Parks & Resorts has been leveraging the Sesame Street brand, and Disney continues to insert its film characters in many park attractions, both new and old. Super Nintendo World at Universal Studios Hollywood opened at the start of 2023 and continues to be a major draw for attendance at the park.

145.0m

Top 20 theme parks in North America attendance 2023

140.5m

Top 20 theme parks in North America attendance 2022

12.8m

Top 10 theme parks in Latin America attendance 2023

10.0m

Top 10 theme parks in Latin America attendance 2022

The Orlando juggernaut

Orlando remains a heavy hitter in the theme park world, with seven theme parks and three water parks making our list. But attendance in Orlando was down in 2023 and the cluster of parks there is not performing on par with other regions around the country. A large part of that is related to international travel that has still not returned to pre-pandemic levels. While multiple factors affect travel choices, an important one is the relative strength of the U.S. dollar, which makes inbound international travel much less attractive. The parks also cite a decrease in group travel as a key reason for lower numbers.

Even though performance elsewhere in the U.S. was stable or up, the weight Florida has on the whole North American market pulled average numbers down, resulting in very little net growth for the entire North American region.

Nevertheless, Orlando remains a strong primary hub of the industry. There may be



a lull, but the party is far from over. In 2023 Disney opened the TRON Lightcycle / Run roller coaster at Magic Kingdom and the walkthrough attraction Journey of Water, Inspired by Moana at EPCOT. Disney has pledged \$60 billion for global investment over the next decade, looking to continue "turbocharging" Disney Experiences. In Orlando, this includes a Magic Kingdom expansion as well as new Disney IP integrations (e.g., reimagining Animal Kingdom's Dinoland with Encanto and Indiana Jones). SeaWorld Orlando is also continuing the multi-year investments in its property, including new roller coasters, water slides and more. Finally, Universal's big investment in Epic Universe, scheduled to open in 2025, will create major buzz for the market.

The reliable water park market

In the Americas region, water parks remain mostly stable and successful. They typically draw from a local base and don't have as many multiple-day visitors as theme parks, so operators have had to become more thoughtful in their approach to marketing. In particular, Six Flags has more effectively integrated water parks into its ecosystem, providing extra perks for season passholders, such as VIP areas or premium cabana locations, all designed to increase the length of stay and number of visits.

Six Flags also rolled out its new SixPay system, an RFID wristband product that allows guests to load money into their account and pay with their wristbands throughout the water park. Other major global operators like Disney and Universal have been doing this for a while, and it is a reliable method for increasing in-park spend, particularly at water parks.

In Latin America, water park growth is strong, with five parks surpassing the 1 million visitor benchmark. The Latin American water park market has proven steadfast and strong, marking its third year of double-digit growth and far surpassing pre-pandemic records, a feat that seems a few years out for Latin American theme and amusement parks. Although larger growth from previous years seems to have slowed as the market matures, savvy operators have invested considerably in marketing and technology upgrades, strengthened brand partnerships, expanded guest services and offerings, and made concerted effort to extend visitor length of stay. In Brazil, parks have started to build out an expanded real estate portfolio by offering a fractional product (timeshare) tied to water parks that has also driven attendance.

13.7m

Top 20 water parks in North America attendance 2023

12.6m

Top 20 water parks in North America attendance 2022

12.0m

Top 10 water parks in Latin America attendance 2023

10.1m

Top 10 water parks in Latin America attendance 2022

Pirates themed wave pool at Thermas Water Park. Sao Pedro, Brazil.

Image credit: Thermas Water Park

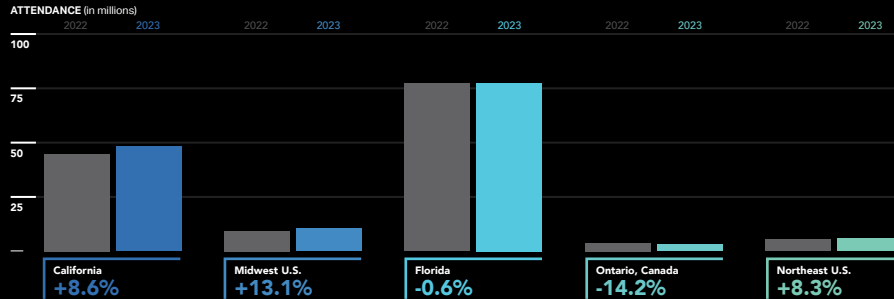
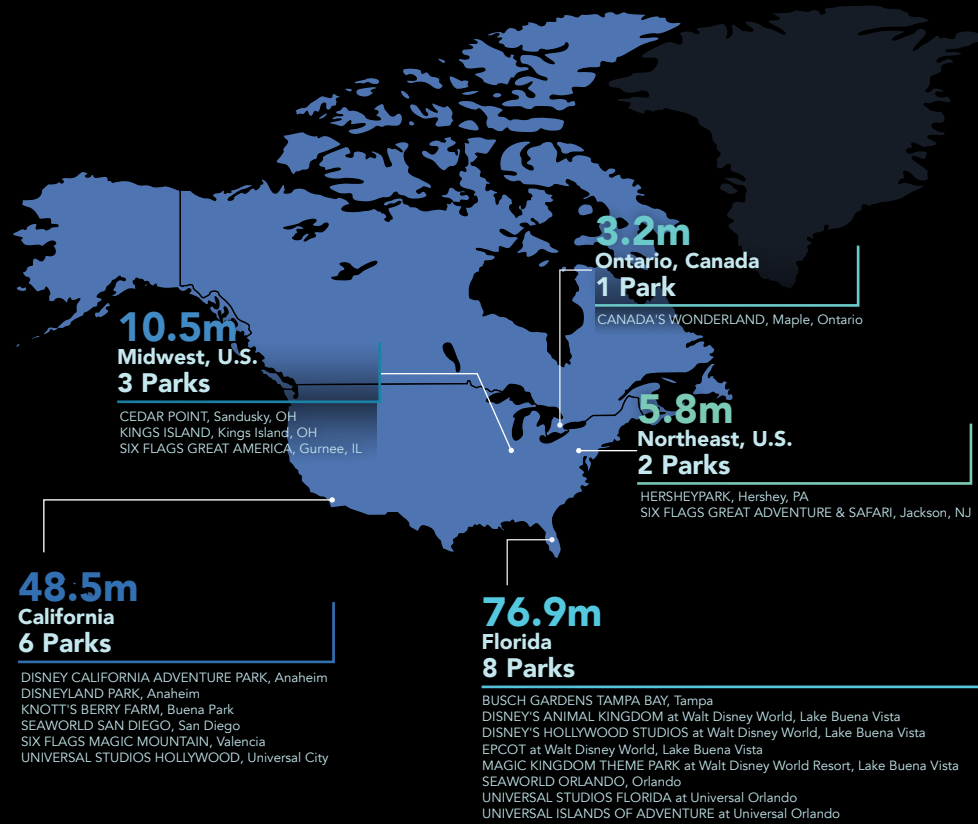


Parque Temático Hacienda Nápoles. Puerto Triunfo, Antioquia, Colombia.

Image credit: Parque Temático Hacienda Nápoles



Top 20 Amusement/Theme Parks North America



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)		
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9	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL	-2.8%	8,770	9,027	
10	SEAWORLD ORLANDO, ORLANDO, FL	-2.5%	4,342	4,454	
11	KNOTT'S BERRY FARM, BUENA PARK, CA	8.4%	4,228	3,899	
12	CEDAR POINT, SANDUSKY, OH	17.6%	4,050	3,444	
13	BUSCH GARDENS TAMPA BAY, TAMPA, FL	-1.3%	4,000	4,051	
14	SEAWORLD SAN DIEGO, SAN DIEGO, CA	13.8%	3,990	3,507	
15	KINGS ISLAND, KINGS ISLAND, OH	4.4%	3,488	3,340	
16	SIX FLAGS MAGIC MOUNTAIN, VALENCIA, CA	13.6%	3,400	2,993	
17	HERSHEYPARK, HERSHEY, PA	3.0%	3,321	3,223	
18	CANADA'S WONDERLAND, MAPLE, ONTARIO	-14.2%	3,232	3,768	
19	SIX FLAGS GREAT AMERICA, GURNEE, IL	18.3%	3,000	2,535	
20	SIX FLAGS GREAT ADVENTURE & SAFARI, JACKSON, NJ	16.1%	2,500	2,153	
TOP 20 TOTAL ATTENDANCE			3.2%	144,981	140,483
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*			3.2%	144,981	140,483

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3%

Top 20 amusement/theme parks North America attendance change 2022-23*

145.0m

Top 20 amusement/theme parks North America attendance 2023

140.5m

Top 20 amusement/theme parks North America attendance 2022*

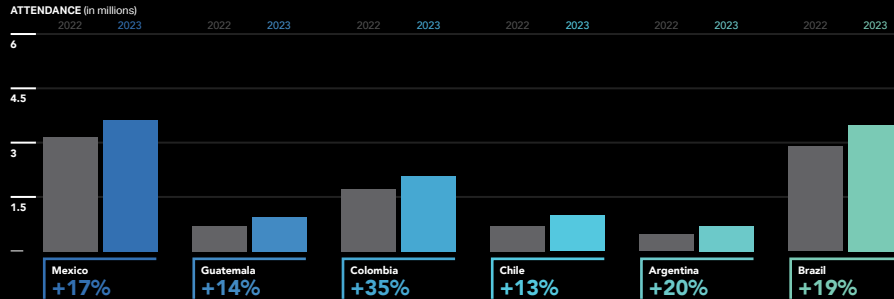
*Year over year attendance growth is calculated by assessing the total attendance of the top parks listed in this year's list (2023) and the estimated total attendance of the top parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Top 10 Amusement/Theme Parks Latin America



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)		
			2023	2022	
1	BETO CARRERO WORLD, SANTA CATARINA, BRAZIL	20.0%	2,792	2,327	
2	SIX FLAGS MEXICO, MEXICO CITY, MEXICO	17.0%	2,021	1,727	
3	PARQUE XCARET, CANCUN, MEXICO	17.0%	1,637	1,399	
4	PARQUE MUNDO AVENTURA, BOGOTÁ, COLOMBIA	35.0%	1,015	752	
5	FANTASIALANDIA, SANTIAGO, CHILE	13.1%	961	850	
6	MUNDO PETAPA, GUATEMALA CITY, GUATEMALA	14.0%	912	800	
7	THEME PARQUE NACIONAL DEL CAFÉ, QUINDIO, COLOMBIA	35.0%	845	626	
8	HOPI HARI, VINHEDO, BRAZIL	15.2%	720	625	
9	PARQUE DE LA COSTA, BUENOS AIRES, ARGENTINA	20.0%	617	514	
10	EL SALITRE MAGICO, BOGOTÁ, COLOMBIA	35.1%	608	450	
TOP 10 TOTAL ATTENDANCE			20.4%	12,128	10,070
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*			34.8%	12,128	8,995

© 2024 TEA / AECOM



35%

Top 10 amusement/theme parks North America attendance change 2022-23*

12.1m

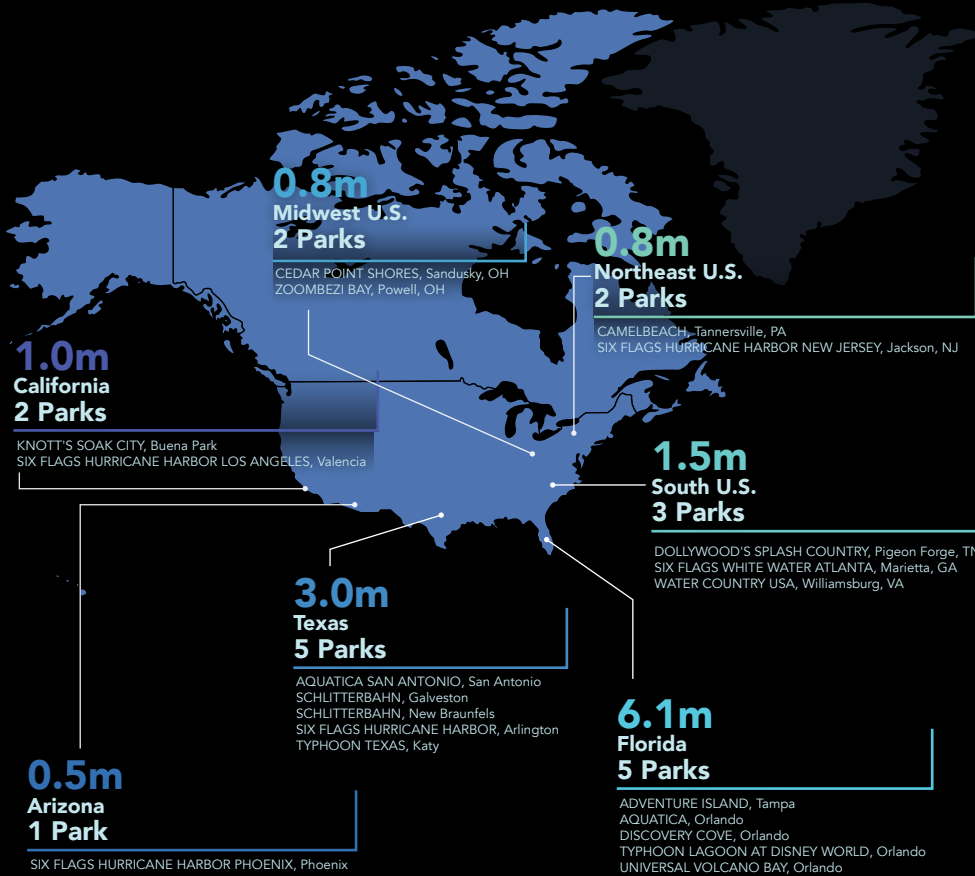
Top 10 amusement/theme parks Latin America attendance 2023*

9.0m

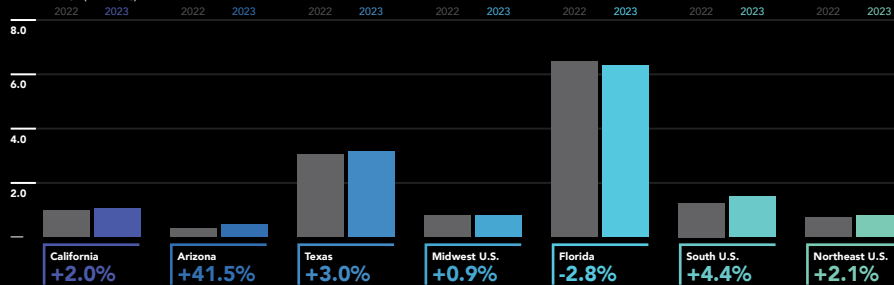
Top 10 amusement/theme parks Latin America attendance 2022*

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Top 20 Water Parks North America



ATTENDANCE (in millions)



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
1	TYPHOON LAGOON AT DISNEY WORLD, ORLANDO, FL	-0.9%	1,898	1,915
2	UNIVERSAL VOLCANO BAY, ORLANDO, FL	-2.7%	1,800	1,850
3	AQUATICA, ORLANDO, FL	-7.2%	1,437	1,548
4	SCHLITTERBAHN, NEW BRAUNFELS, TX	-1.4%	933	946
5	WATER COUNTRY USA, WILLIAMSBURG, VA	4.1%	736	707
6	AQUATICA SAN ANTONIO, SAN ANTONIO, TX	3.0%	650	631
7	ADVENTURE ISLAND, TAMPA, FL	0.6%	640	636
8	KNOTT'S SOAK CITY, BUENA PARK, CA	-3.3%	580	600
9	SCHLITTERBAHN, GALVESTON, TX	0.0%	539	539
10	SIX FLAGS HURRICANE HARBOR, ARLINGTON, TX	22.7%	476	388
11	SIX FLAGS HURRICANE HARBOR NEW JERSEY, JACKSON, NJ	5.6%	450	426
12	SIX FLAGS HURRICANE HARBOR PHOENIX, PHOENIX, AZ	41.5%	450	318
13	SIX FLAGS HURRICANE HARBOR LOS ANGELES, VALENCIA, CA	10.0%	440	400
14	ZOOMBEZI BAY, POWELL, OH	3.0%	411	399
15	CEDAR POINT SHORES, SANDUSKY, OH	-1.2%	400	405
16	DOLLYWOOD'S SPLASH COUNTRY, PIGEON FORGE, TN	3.0%	379	368
17	SIX FLAGS WHITE WATER ATLANTA, MARIETTA, GA	6.6%	373	350
18	CAMELBEACH, TANNERSVILLE, PA	-1.9%	366	373
19	DISCOVERY COVE, ORLANDO, FL	-0.3%	363	364
20	TYPHOON TEXAS, KATY, TX	-1.9%	357	364

TOP 20 TOTAL ATTENDANCE	1.1%	13,678	13,527
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*	8.5%	13,678	12,607

© 2024 TEA / AECOM

9%

Top 20 water parks North America attendance change 2022-23*

13.7m

Top 20 water parks North America attendance 2023*

12.6m

Top 20 water parks North America attendance 2022*

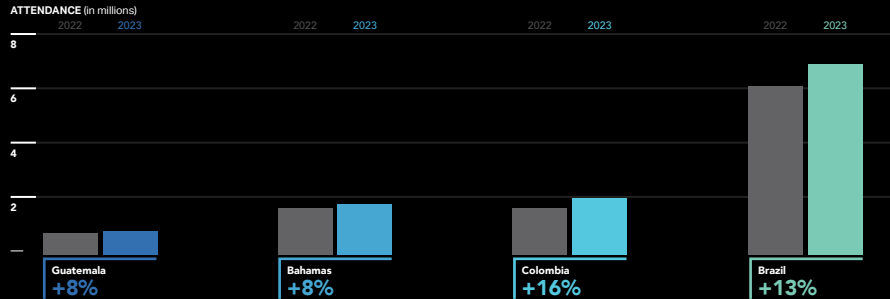
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Top 10 Water Parks Latin America



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)		
			2023	2022	
1	THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	13.0%	1,954	1,729	
2	AQUAVENTURE ATLANTIS PARADISE ISLAND, NASSAU, BAHAMAS	8.0%	1,891	1,751	
3	HOT PARK RIO QUENTE, CALDAS NOVAS, BRAZIL	11.9%	1,600	1,430	
4	HACIENDA NAPOLES THEME PARK, MEDELLIN, COLOMBIA	20.0%	1,200	1,000	
5	HOT BEACH, OLIMPIA, BRAZIL	13.2%	1,035	914	
6	PISCILAGO, GIRARDOT (BOGOTA), COLOMBIA	12.0%	914	816	
7	PARQUE ACUATICO XOCOMIL, SAN MARTÍN ZAPOTITLÁN, RETALHULEU, GUATEMALA	8.0%	900	833	
8	BEACH PARK, AQUIRAZ, BRAZIL	15.1%	900	782	
9	THERMAS WATER PARK, SAO PEDRO, BRAZIL	15.1%	867	753	
10	MAGIC CITY WATER PARK, SUZANO, BRAZIL	12.0%	690	616	
TOP 10 TOTAL ATTENDANCE			12.5%	11,951	10,624
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*			18.2%	11,951	10,113

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18%
Top 10 water parks North America attendance change 2022-23*

12.0m
Top 10 water parks Latin America attendance 2023*

10.1m
Top 10 water parks Latin America attendance 2022*

*Year over year attendance growth is calculated by assessing the total attendance of the top parks listed in this year's list (2023) and the estimated total attendance of the top parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Bigger is better as the market returns

The APAC region rebounds to 4% above pre-pandemic numbers with eight new parks on the list; larger properties receive the biggest boosts; smaller water parks see more tepid results

The Asia-Pacific region made great strides towards returning to pre-pandemic levels, with the top 20 parks totaling attendance 4% above 2019 numbers. China, basically free of pandemic restrictions for 2023, saw the greatest boost of attendance, with Shanghai Disneyland leading the pack at a nearly 25% increase over 2019. Every single park on our top 20 list had a net gain of attendance over 2022, with almost half the list doubling their attendance in 2023, and several nearly tripling it.



Beth Chang

Executive Director –
Economics, Asia-Pacific



Chris Yoshii

Vice President –
Economics, Asia-Pacific



ASIA-PACIFIC



The NO LIMIT! Summer Splash Parade made its debut in 2024 at Universal Studios Japan. Image credit: © Universal Destinations & Experiences

The year 2023 marks the first re-ranking of our lists since 2019, and eight new parks have entered the list - all of them in China. With the exception of Universal Studios Beijing - which entered the list this year at #6 with attendance of 9 million - every other new park was in the 4-5 million range. Fantawild operates six of these parks. Shanghai Haichang Ocean Park, opened in late 2018, also joins the list. They replaced notable contenders like Ocean Park (Hong Kong), Universal Studios Singapore, and multiple OCT parks.

While this notable story of recovery is impressive, these attendance figures are

not necessarily translating to increased revenues, particularly for China's parks. Chinese nationals appear hesitant to increase spending due to general uncertainty about the Chinese economy, resulting in a significant reduction in per capita revenue for parks.

Japan

Universal Studios Japan took the top spot on the APAC list, thanks in part to the continued popularity of Super Nintendo World, which opened in 2021. Leaning into the strength of homegrown brands,

“ While this notable story of recovery is impressive, these attendance figures are not necessarily translating to increased revenues



Universal will open a Donkey Kong-themed addition to the land later in 2024, likely driving additional attendance to the park.

Tokyo Disneyland and Tokyo DisneySea saw a combined 24.5% attendance increase from last year. This is still below 2019 numbers, due to Oriental Land Company intentionally managing attendance at both parks, while laying increased emphasis on revenue growth. Fantasy Springs, DisneySea's largest expansion ever, opened in June 2024. It adds significant capacity to the park and is expected to boost attendance in the coming years.

Hong Kong SAR

Hong Kong continued to be a challenging market for themed entertainment post-pandemic, with travel still relatively expensive in 2023. Tourism recovery was

more evident towards the end of 2023 and beginning of 2024. That said, Hong Kong Disneyland jumped to the #7 spot on the APAC list, returning to its pre-pandemic level. Out of its 6.4 million visitors, a record-breaking 4.1 million were local residents. This indicates a remarkable 55% capture rate of the resident market. The park opened the large World of Frozen expansion in November 2023, which is likely to bring its attendance numbers up even more in 2024.

China

Numbers for China's top parks are impressive, but in some cases they don't tell the whole story. Without a doubt, Shanghai Disneyland is extremely popular and the most-attended park in China. The new Zootopia-themed area that opened in late 2023 (and heavily marketed in both Shanghai and Beijing) might be enough



Everland Resort. Yongin, Gyeonggi-do, South Korea Image credit: © Samsung Everland

to drive the park into the top spot on our list next year. A recently announced development to the south of the resort is expected to include about 6,000 hotel rooms, along with additional entertainment, commercial and residential facilities. While direct competition for Disney seems unlikely, a cluster of international IP-themed hotels is expected to arise, feeding demand for lodging near the resort.

Chimelong Group opened its new Spaceship indoor marine-themed park and continues to invest in its other locations. The company's larger properties, such as Ocean Kingdom and Chimelong Paradise, have returned to pre-pandemic attendance levels. Chimelong's smaller attractions lag behind, perhaps pointing to a trend of Chinese consumers prioritizing saving for destination parks over smaller, regional properties.

In 2023, OCT's Happy Valley Group subsidy began reporting numbers for its 17 theme parks and eight water parks. Attendance for the chain has been slow to recover, perhaps due to a lack of continued investment in the parks during the pandemic. The only park to remain on the list this year – Happy Valley Beijing – saw a modest 16% increase from 2022 and remains down 16% from 2019 numbers.

Statistically, Fantawild had an impressive year, with six parks appearing on our list for the first time. The chain has continued to expand under the "asset light" model we've mentioned for the last few years. In the typical setup, local governments own the parks with Fantawild providing operational services. As such, the profit motives might be different, and many tickets are reportedly distributed at low or no cost with a special focus on group admissions.

Nevertheless, Fantawild now operates 35 parks, including two that opened in 2023. While their model might not translate to

traditional per capita spending levels, it has shown effective in encouraging attendance to Fantawild parks.

Of special note: two parks on our list – China Dinosaur Park and Shanghai Haichang Ocean Park – have owners that are expanding into the FEC market. Catering to a cultural demand for increased educational opportunities for children, Dinoman Clubs are being developed to incorporate science and sports into entertainment. Haichang is rolling out 30 oceanariums - mostly in retail malls - that operate on the "light asset" model.

“

Some park owners are expanding into the FEC market. Catering to a cultural demand for increased educational opportunities for children, [new concepts] are being developed to incorporate science and sports into entertainment

”



Chimelong Group opened its new Chimelong Spaceship theme park in 2023.
Image credit: © Zhou Hao



Shanghai Disneyland Park
Shanghai, China
Image credit: © Disney

Water parks

Interestingly, all of our 2023 APAC water parks were on the list in 2019, just with some rankings shifting. No new parks entered the list post-pandemic.

The water park scene is really two stories rolled into one. Many of the larger water parks have nearly completely recovered, while smaller parks are still significantly behind 2019 numbers. The collective list is 13% below its pre-pandemic peak.

Aquaventure Atlantis Sanya saw the biggest post-pandemic surge with a 33% increase over 2019. Though travel opened up for

Chinese tourists, costs of travel overseas remained prohibitive for many, resulting in Sanya being a reasonable alternative with its high-end hotels and attractions.

Even though our list hasn't changed dramatically and some numbers remain depressed, that doesn't mean there isn't new growth in this market, particularly in China. Most of the country's weather is not favorable for year-round operation, with many major population centers having 100 days (or fewer) of seasonal operation available to them. Naturally, those parks are smaller with limited capacity. While they can ultimately be successful, it's difficult for them to meet the threshold for our list.

146.2m

Top 20 theme parks in Asia-Pacific attendance 2023

19.2m

Top 20 water parks in Asia-Pacific attendance 2023

82.3m

Top 20 theme parks in Asia-Pacific attendance 2022

13.7m

Top 20 water parks in Asia-Pacific attendance 2022

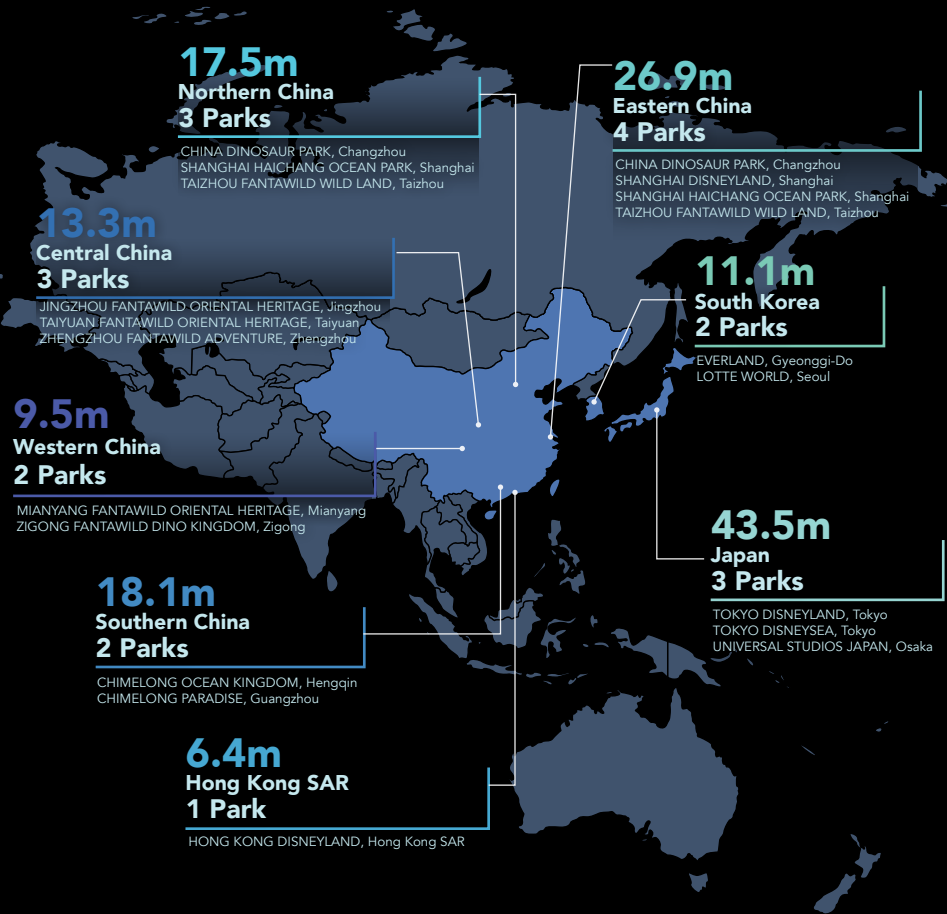


Atlantis Aquaventure Waterpark, Sanya, Hainan Island, China
© Aquaventure Atlantis

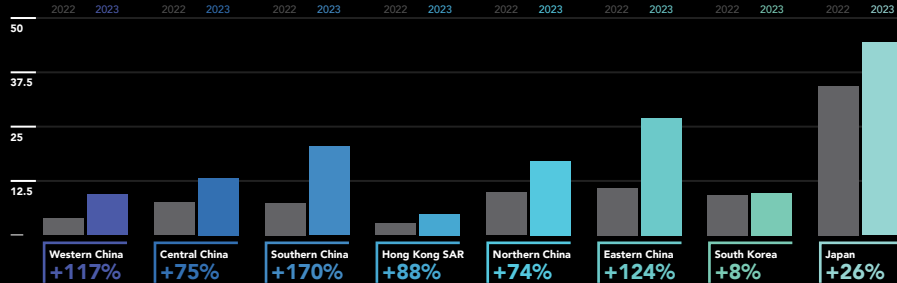


The new Bermuda Storm ride at Chimelong Spaceship
Zhuhai, China
© Chimelong Group

Top 20 Amusement/Theme Parks Asia-Pacific



ATTENDANCE (in millions)



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
1	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	29.6%	16,000	12,350
2	TOKYO DISNEYLAND, TOKYO, JAPAN	25.8%	15,100	12,000
3	SHANGHAI DISNEYLAND, SHANGHAI, CHINA	164.2%	14,000	5,300
4	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	184.5%	12,520	4,400
5	TOKYO DISNEYSEA, TOKYO, JAPAN	22.8%	12,400	10,100
6	UNIVERSAL STUDIOS BEIJING, BEIJING, CHINA	109.3%	9,000	4,300
7	HONG KONG DISNEYLAND, HONG KONG SAR	88.2%	6,400	3,400
8	EVERLAND, GYEONGGI-DO, SOUTH KOREA	1.9%	5,880	5,770
9	CHIMELONG PARADISE, GUANGZHOU, CHINA	142.6%	5,580	2,300
10	LOTTE WORLD, SEOUL, SOUTH KOREA	14.8%	5,190	4,520
11	ZIGONG FANTAWILD DINO KINGDOM, ZIGONG, CHINA	177.7%	4,860	1,750
12	MIANYANG FANTAWILD ORIENTAL HERITAGE, MIANYANG, CHINA	77.0%	4,620	2,610
13	JINGZHOU FANTAWILD ORIENTAL HERITAGE, JINGZHOU, CHINA	92.1%	4,610	2,400
14	ZHENGZHOU FANTAWILD ADVENTURE, ZHENGZHOU, CHINA	178.6%	4,430	1,590
15	OCT HAPPY VALLEY, BEIJING, CHINA	16.0%	4,340	3,740
16	CHINA DINOSAUR PARK, CHANGZHOU, CHINA	95.5%	4,300	2,200
17	SHANGHAI HAICHANG OCEAN PARK, SHANGHAI, CHINA	84.9%	4,290	2,320
18	TAIZHOU FANTAWILD WILD LAND, TAIZHOU, CHINA	98.4%	4,286	2,160
19	TAIYUAN FANTAWILD ORIENTAL HERITAGE, TAIYUAN, CHINA	18.2%	4,230	3,580
20	SHENYANG FANTAWILD ADVENTURE, SHENYANG, CHINA	103.9%	4,200	2,060
TOP 20 TOTAL ATTENDANCE			146,236	88,850
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*			77.8%	82,260

© 2024 TEA / AECOM

78%

Top 20 amusement/ theme parks Asia-Pacific attendance change 2022-23*

146.2m

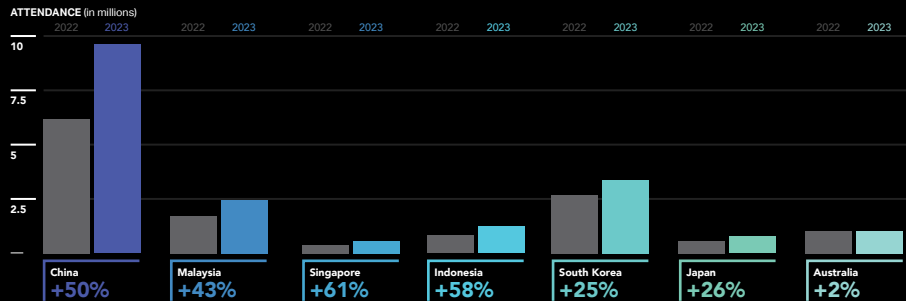
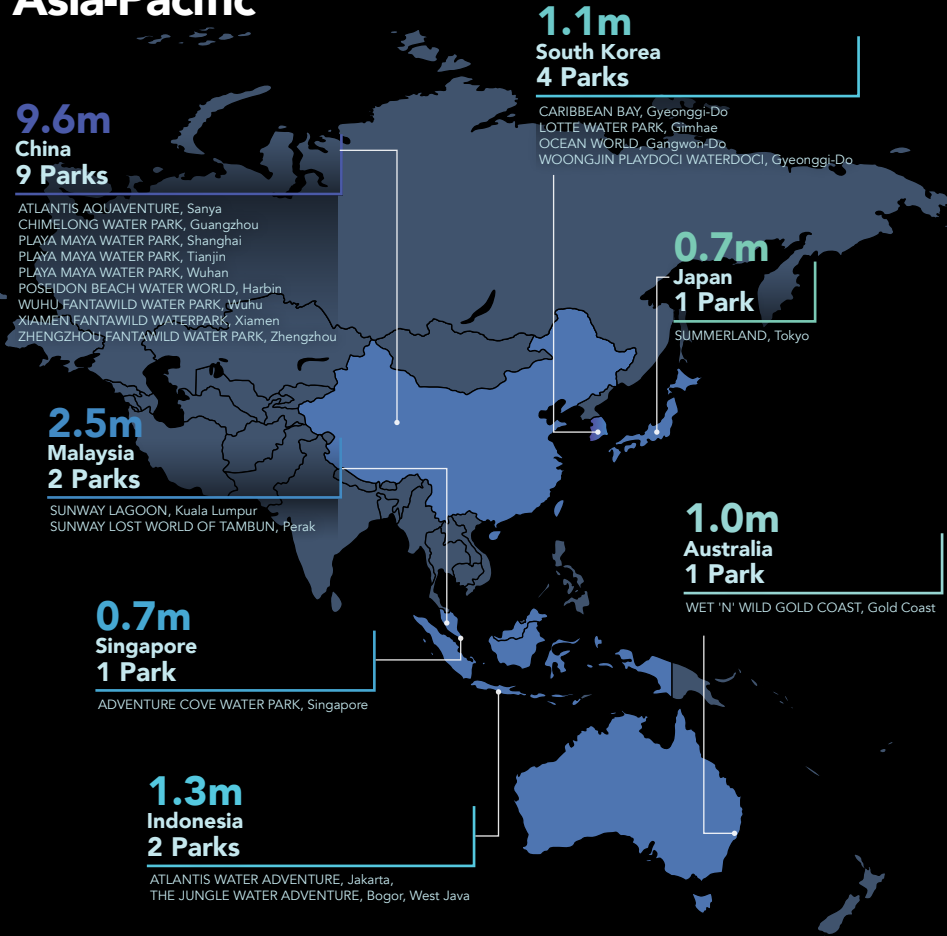
Top 20 amusement/ theme parks Asia-Pacific attendance 2023*

82.3m

Top 20 amusement/ theme parks Asia-Pacific attendance 2022*

*Year over year attendance growth is calculated by assessing the total attendance of the top parks listed in this year's list (2023) and the estimated total attendance of the top parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Top 20 Water Parks Asia-Pacific



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	73.3%	2,807	1,620
2	ATLANTIS AQUAVENTURE, SANYA, CHINA	154.0%	1,600	630
3	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	57.9%	1,500	950
4	CARIBBEAN BAY, GYEONGGI-DO, SOUTH KOREA	27.6%	1,270	995
5	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	1.9%	1,050	1,030
6	SUNWAY LOST WORLD OF TAMBUN, PERAK, MALAYSIA	25.0%	1,000	800
7	OCEAN WORLD, GANGWON-DO, SOUTH KOREA	28.0%	960	750
8	WUHU FANTAWILD WATER PARK, WUHU, CHINA	-0.6%	922	928
9	XIAMEN FANTAWILD WATERPARK, XIAMEN, CHINA	34.3%	905	674
10	POSEIDON BEACH WATER WORLD, HARBIN, CHINA	43.2%	895	625
11	SUMMERLAND, TOKYO, JAPAN	26.1%	870	690
12	ZHENGZHOU FANTAWILD WATER PARK, ZHENGZHOU, CHINA	61.8%	783	484
13	PLAYA MAYA WATER PARK, SHANGHAI, CHINA	155.2%	740	290
14	THE JUNGLE WATER ADVENTURE, BOGOR, WEST JAVA, INDONESIA	15.8%	674	582
15	ATLANTIS WATER ADVENTURE, JAKARTA, INDONESIA	149.8%	657	263
16	LOTTE WATER PARK, GIMHAE, SOUTH KOREA	12.0%	614	548
17	ADVENTURE COVE WATER PARK, SINGAPORE	61.1%	580	360
18	PLAYA MAYA WATER PARK, TIANJIN, CHINA	-20.6%	500	630
19	PLAYA MAYA WATER PARK, WUHAN, CHINA	-12.5%	490	560
20	WOONGJIN PLAYDOCI WATERDOCI, GYEONGGI-DO, SOUTH KOREA	27.8%	418	327
TOP 20 TOTAL ATTENDANCE 2023		40.0%	19,235	13,736
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*		40.0%	19,235	13,736

© 2024 TEA / AECOM

40%

Top 20 water parks in Asia-Pacific attendance change 2022-23*

19.2m

Top 20 water parks in Asia-Pacific attendance 2023*

13.7m

Top 20 water parks in Asia-Pacific attendance 2022*

*Year over year attendance growth is calculated by assessing the total attendance of the top parks listed in this year's list (2023) and the estimated total attendance of the top parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Returning to a stable, growing market

European parks post strong numbers on a backbone of continued investment; the Middle East joins our Top 20 list

The Top 20 theme parks in the EMEA region collectively broke through pre-pandemic numbers for the first time. A combined attendance of 64.5 million in 2019 was outpaced by 66.2 million in 2023, marking an official end to the recovery period in the EMEA region. This impressive total represents a nearly 5% increase over 2022.

About 40% of the parks in our list are still below 2019 numbers; all but one are at least 85% recovered. Liseberg in Sweden is the list's sole outlier. An unfortunate weather season and publicity surrounding an accident at Gröndal brought the park down 8% from 2022 and kept it at only 78% of 2019.

Notably, operators are reporting higher per cap spending. Profitability appears to be outpacing the boost from attendance. Operators are focused on providing higher quality experiences, serving better food, and charging more for all of it. Although in this region consumers tend to resist higher ticket prices, they are willing to pay more inside the park to enjoy a better product.



Jodie Lock

Associate Director of Economic Development – Economics, EMEA

EMEA

Disneyland Paris celebrated its 30th anniversary in 2023.

Marne-La-Vallée, France.
Image credit: © Disney

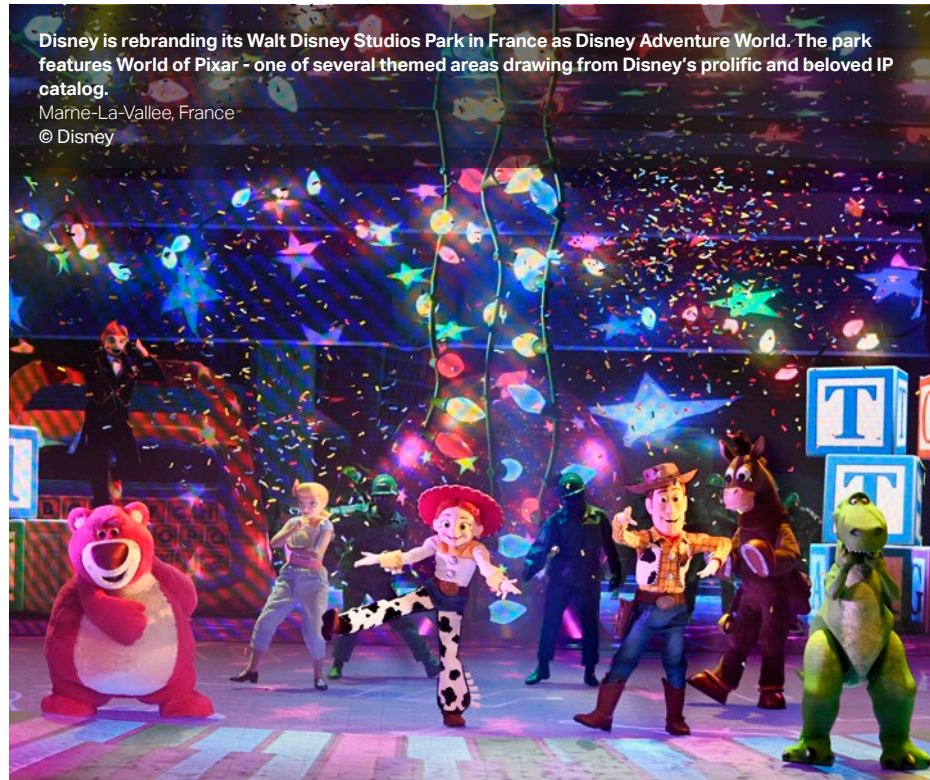


Destination Resorts

The strongest growth occurred at parks with overnight accommodations and a second gate. Disneyland Paris remains the region leader, with over 16 million in combined attendance between its two parks. The resort has invested US\$1.5 billion into its Walt Disney Studios Park over the past five years, as well as continued to celebrate the resort's 30th anniversary throughout much of 2023. Attendance was also buoyed by a regional boost in tourism, up 8% year-over-year. The continued investment in Walt Disney Studios Park (including an upcoming rebranding into Disney Adventure World) will hopefully help raise this park's profile, which has underperformed the company's second-gate parks elsewhere around the world.

Europa-Park in Germany also continued to grow its resort offerings. The park steadily invested in recent years, including Eatrenalin in 2023. The innovative restaurant puts guests in individual ride vehicles that move throughout the building, with a different course served in each room. It highlights the resort's continued commitment to expanding its appeal as a vacation destination. Two new hotels are in the works, along with additional investment ahead of the park's 50th anniversary in 2025.

Spain's PortAventura World also benefits from being a multi-gate destination. The resort has expanded its number of hotel rooms in recent years and 2023 marked the opening of Uncharted: The Enigma of Penitence, a hybrid roller coaster and dark ride attraction inspired by the Columbia



Pictures film of the same name. Both attendance and revenues reached a record high in 2023.

Efteling in The Netherlands saw record attendance years in both 2022 and 2023. The park focused extensively on cultural heritage, park improvements and conservation projects, including adding 12,000 more solar panels to their already impressive array. The park is anticipating its next new attraction, Danse Macabre, in 2024 and the Efteling Grand Hotel in 2025.

Other parks in Europe, (e.g. Parc Astérix and Futuroscope), have noted this resort destination trend and moved to take advantage of it. Parc Astérix added its extremely popular roller coaster, Toutatis, as part of a major expansion that included a large playground and new restaurant. The park is celebrating its 35th anniversary in 2024 with additional investments coming online. Futuroscope is in the midst of a 10-year strategic plan. Recent hotel openings, combined with new in-park outlets and an indoor water park, have proven successful for the park.

“

The strongest growth occurred at parks with overnight accommodations and a second gate.

”

Regional success stories

Even parks that draw from more local audiences tended to keep up with investment during the pandemic and are now seeing the benefits with stable and growing attendance figures.

Puy du Fou opened a new theater and show, *Le Mime et l'Etoile*, at its flagship location in France, which received several industry awards, including an IAAPA Brass Ring and TEA Thea Award. The company has expanded in Spain and China, with more plans in development. Still, it is the original park in France that maintains a solid footing in our top 20 list.

Phantasialand (Germany) continues to roll out additions. The park is space-constrained, and they frequently have to replace rather than expand. Phantasialand benefits from a positive reputation and consistent performance.

66.2m

Top 20 theme parks in EMEA attendance 2023

63.4m

Top 20 theme parks in EMEA attendance 2022



The Middle East makes the list

The first Middle East park to enter our list – Warner Bros. World Abu Dhabi – posted an attendance of 1.75 million, landing them in spot #17 and marking a milestone for the region. The park would have made the list in 2022 had the lists not been frozen during the pandemic.

Located just around the corner, SeaWorld Abu Dhabi opened in May of 2023 and posted an impressive attendance of 1.3 million over just seven months. Should this attendance trend continue, the park will easily make our 2024 list, making 10% of the parks on our list from Yas Island. Combined with the established water parks already on the rankings, it's clear that the region has made significant inroads to the global attractions scene.

United Kingdom reports tepid growth

Some of the smallest growth percentages this year came from the U.K. There are a few reasons for this. Overall tourism to the U.K. remains below pre-pandemic levels, with Brexit providing both actual and perceived barriers to entry. Additionally, the government ended the VAT Retail Export Scheme, which reportedly has deterred 2 million tourists and cost over £10.6 billion in sales. The change has also impacted the museum, hospitality and entertainment markets.

In 2023, UK operator Merlin Entertainments saw steady gains of 1-5% across its parks over 2022. Heide Park in Germany and Gardaland in Italy were some of the best performers out of their European resort portfolio. Investments at the LEGO

branded properties tended to boost their attendance as well. Chessington World of Adventures slipped off the list this year, but only just barely - remaining a contender for the future.

Finally, Universal recently announced a potential park and resort in the UK near Bedford (roughly halfway between London and Birmingham). Though nothing has been confirmed, the addition of a major operator and park to England could have a dramatic effect on the parks in the region

Africa expecting growth

South Africa remains the only country supporting any sizeable attractions facilities on the African continent. uShaka Marine World reportedly draws in 1.5 million visitors each year, spread across multiple attractions including an aquarium and water park. Johannesburg's Gold Reef City, the largest theme park in South Africa, is also a multi-attraction destination with an extremely reasonable entrance fee under \$15.

As a result of relaxed visa restrictions, South Africa is poised for an uptick in tourism in 2024 and beyond. This should positively impact attractions and parks throughout the country.

Water parks

Our Top 10 list of water parks also set a record for attendance, outpacing 2019's total number by nearly 3.5 million. The list remains largely similar, with two new additions. Water parks benefited from a full year free of pandemic restrictions for the first time since 2019, especially those with indoor elements.

Therme Erding in Germany retains the top spot with Aquaventure in Dubai holding on to second place. Aquaventure posted a staggering 57% increase over 2022, boosted by the high-end Atlantis Royal addition and a regional increase in attractions, driving tourism. The Middle East water park market hasn't seen new parks in a while, so the existing facilities tend to benefit from the increase in tourists without an increase in direct competition.

Therme Erding is joined in third place by the increasingly popular Therme Bucharest (Romania). The Therme wellness attraction model is a hybrid blend of wellness and leisure facilities and a trend that appears to be catching on in locations around the world (see The Big Picture).

Rulantica is another addition to the list. As part of the larger Europa-Park resort it quickly earned an audience. The mostly indoor park has added seasonal outdoor sections and is connected to one of the resort's newest hotels. The park would have entered our list sooner if we had reranked during the pandemic.

Finally, in a look at the potential future of water parks, Nettebad installed a new AI-powered monitoring system at its park. Cameras watch the pool area and alert lifeguards if it detects someone in need of help. The park reports that the system has been helpful and points out that the technology assists the human staff but does not replace them.

12.5m

Top 10 water parks in EMEA attendance 2023

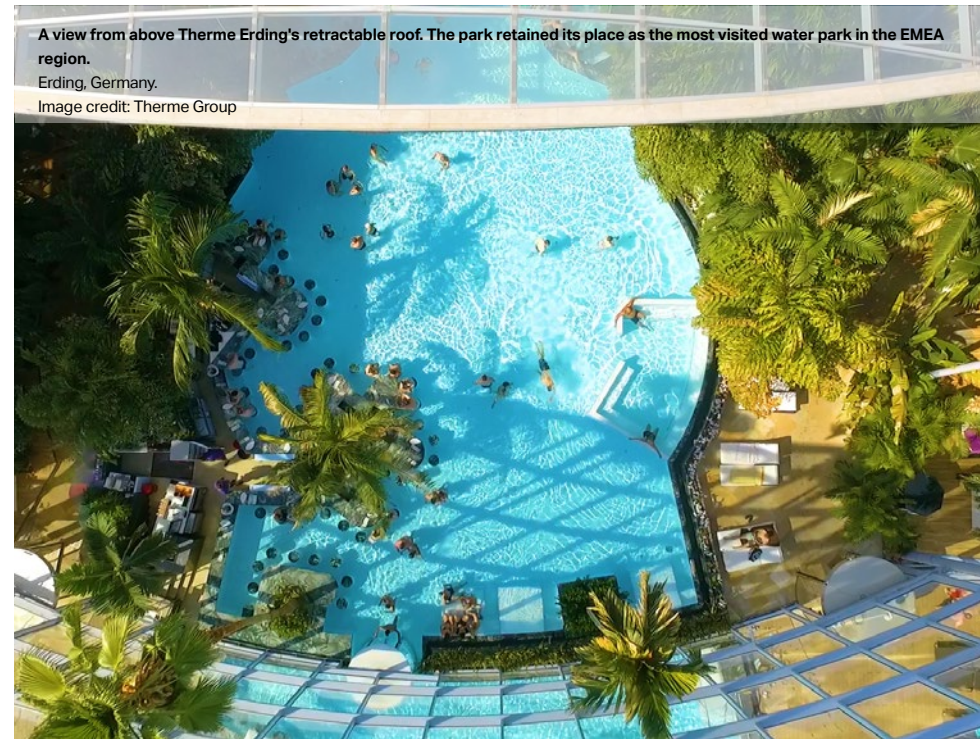
10.3m

Top 10 water parks in EMEA attendance 2022

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The EMEA top 10 list of water parks also set a record for attendance, outpacing 2019's total number by nearly 3.5 million

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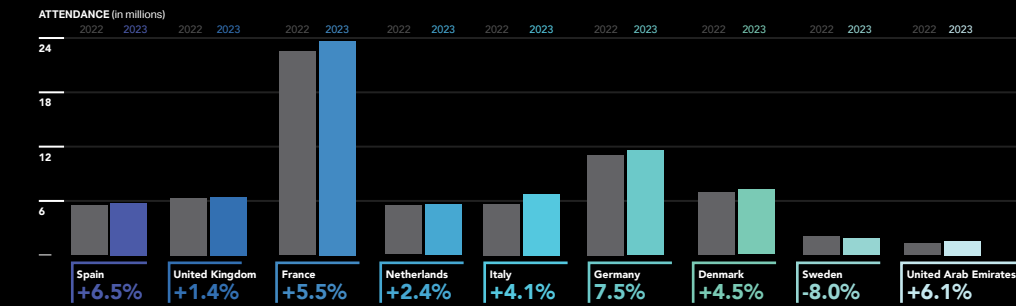
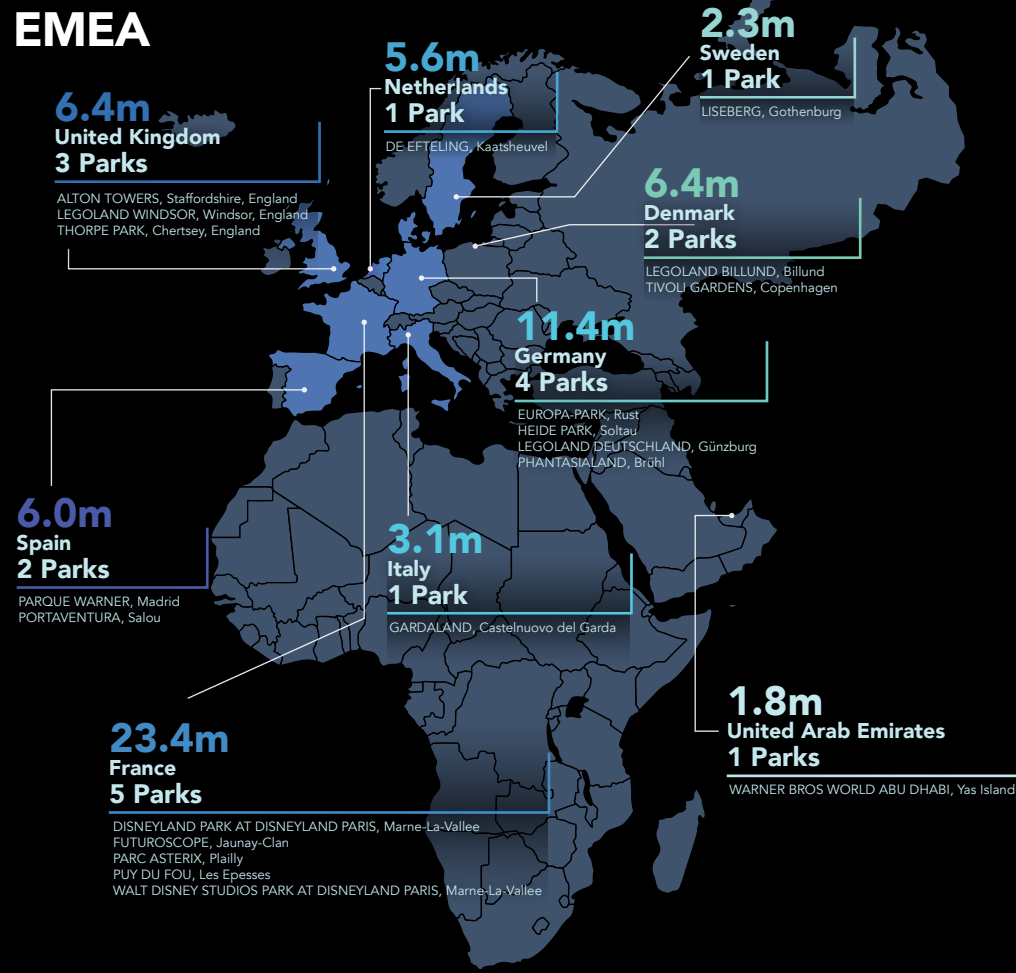


A view from above Therme Erding's retractable roof. The park retained its place as the most visited water park in the EMEA region.
Erding, Germany.
Image credit: Therme Group



Rulantica water park at Europa-Park makes its debut at #7 on the list of top EMEA water parks.
Rust, Germany.
Image credit: © Europa-Park

Top 20 Amusement/Theme Parks EMEA



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	2023	2022
			ATTENDANCE (m)	ATTENDANCE (m)
1	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	4.7%	10,400	9,930
2	EUROPA-PARK, RUST, GERMANY	11.1%	6,000	5,400
3	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	6.7%	5,700	5,340
4	DE EFTELING, KAATSHEUVEL, NETHERLANDS	2.4%	5,560	5,430
5	TIVOLI GARDENS, COPENHAGEN, DENMARK	4.3%	4,031	3,864
6	PORTAVENTURA, SALOU, SPAIN	6.0%	3,975	3,750
7	GARDALAND, CASTELNUOVO DEL GARDA, ITALY	4.1%	3,070	2,950
8	PARC ASTERIX, PLAILLY, FRANCE	7.0%	2,815	2,632
9	PUY DU FOU, LES EPESSES, FRANCE	6.7%	2,500	2,342
10	LEGOLAND WINDSOR, Q WINDSOR, ENGLAND	0.8%	2,420	2,400
11	ALTON TOWERS, STAFFORDSHIRE, ENGLAND	2.2%	2,350	2,300
12	LEGOLAND BILLUND, BILLUND, DENMARK	4.8%	2,350	2,243
13	LISEBERG, GOTHENBURG, SWEDEN	-8.0%	2,300	2,500
14	PHANTASIALAND, BRÜHL, GERMANY	1.9%	2,140	2,100
15	PARQUE WARNER, MADRID, SPAIN	7.5%	2,000	1,860
16	FUTUROSCOPE, JAUNAY-CLAN, FRANCE	2.9%	1,975	1,920
17	WARNER BROS ABU DHABI, ABU DHABI, U.A.E.	6.1%	1,750	1,650
18	HEIDE PARK, SOLTAU, GERMANY	5.0%	1,680	1,600
19	THORPE PARK, CHERTSEY, ENGLAND	1.3%	1,620	1,600
20	LEGOLAND DEUTSCHLAND, GÜNZBURG, GERMANY	5.0%	1,575	1,500
TOP 20 TOTAL ATTENDANCE		4.6%	66,211	63,311
YOY % GROWTH FROM ATTENDANCE REPORTED IN PRIOR YEAR (2022)*		4.5%	66,211	63,361

© 2024 TEA / AECOM

5%

Top 20 amusement/theme parks in EMEA attendance change 2022-23*

66.2m

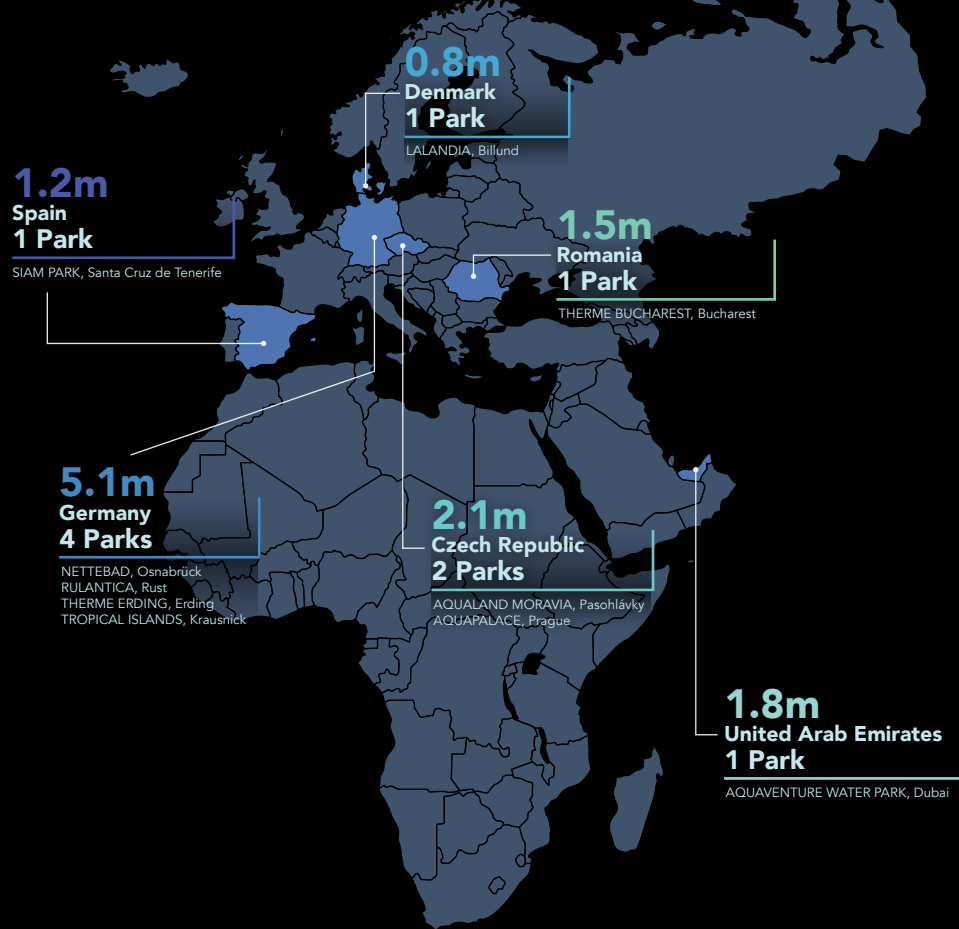
Top 20 amusement/theme parks in EMEA attendance 2023*

63.4m

Top 20 amusement/theme parks in EMEA attendance 2022*

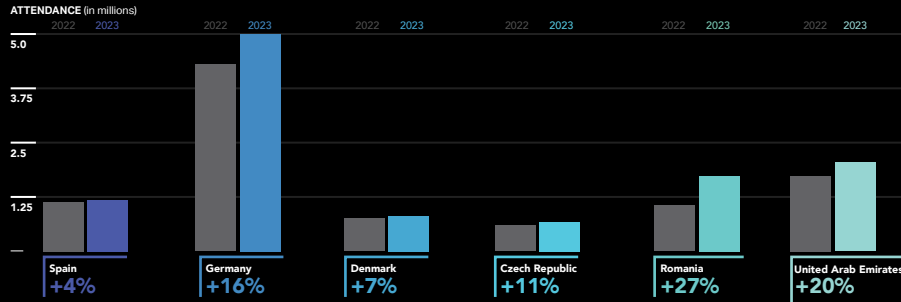
*Year over year attendance growth is calculated by assessing the total attendance of the top parks listed in this year's list (2023) and the estimated total attendance of the top parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Top 10 Water Parks EMEA



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
1	THERME ERDING, ERDING, GERMANY^	9.4%	1,860	1,700
2	AQUAVENTURE WATER PARK, DUBAI, U.A.E.	20.0%	1,800	1,500
3	THERME BUCHAREST, BUCHAREST, ROMANIA^	26.7%	1,520	1,200
4	AQUAPALACE, PRAGUE, CZECH REPUBLIC^	8.3%	1,300	1,200
5	TROPICAL ISLANDS, KRAUSNICK, GERMANY^	13.0%	1,300	1,150
6	SIAM PARK, SANTA CRUZ DE TENERIFE, SPAIN	4.3%	1,200	1,150
7	RULANTICA, RUST, GERMANY	33.3%	1,200	900
8	AQUALAND MORAVIA, CZECH REPUBLIC^	14.4%	835	NA
9	LALANDIA, BILLUND, DENMARK	6.7%	800	750
10	NETTEBAD, OSNABRÜCK, GERMANY^	10.8%	720	NA
TOP 10 TOTAL ATTENDANCE		14.7%	12,535	10,930
YOY % GROWTH FROM ATTENDANCE PUBLISHED IN PRIOR REPORT (2022)*		21.4%	12,535	10,327

© 2024 TEA / AECOM



21%

Top 20 water parks in EMEA attendance change 2022-23*

12.5m

Top 20 water parks in EMEA attendance 2023*

10.3m

Top 20 water parks in EMEA attendance 2022*

^These properties include extensive thermal attraction components, such as saunas, steam rooms and other thermal wellness features.

*Year over year attendance growth is calculated by assessing the total attendance of the top parks listed in this year's list (2023) and the estimated total attendance of the top parks published in the prior year's report (2022). The parks on this list in the current year may be different than the parks listed in the prior year.

Museums on the move

Global market shares are shifting from Europe to Asia; North America in major reinvestment period

Our Museum Index saw the most dramatic changes this year relative to other attraction categories. This shift is partly because rankings were frozen during the past few years due to the unusual operating conditions created during the pandemic. During this time, there were also significant regional shifts in the museum industry that have influenced the performance of cultural institutions around the world.

Historically, Europe dominated market share, but Asia is rapidly closing the gap. In 2019, Asia held six of the top 20 spots, North America had four, and EMEA dominated with 50% of the list. Following this year's reassessment of rankings, Asia and EMEA each occupy eight of the top 20 spots on the list, while North America remains at four. With respect to attendance volume, EMEA accounted for 54% of global museum attendance at the top 20 museums in 2019, dropping to 42% in 2023. Asia's share of attendance increased from 27% to 39%, while North America remained stable at nearly 19%. It is still too early to determine if this shift is a long-term trend or merely temporary.



Linda Cheu

Principal Consultant,
Robinett Economics

MUSEUMS



The American Museum of Natural History's Richard Gilder Center for Science, Education, and Innovation is a \$465 million expansion project that opened in 2023, adding 230,000 square feet to the museum. Image Credit: Albeto-G-R / Alamy Stock Photo



The Suzhou Museum was a new entrant to our list with 4.9 million attendance. ImageCredit: © Michael Feeman / Alamy Stock Photo

If we analyze pandemic recovery trends, attendance at the top 60 museums globally reached 94% of 2019 levels, although the specific museums included in these lists differ. In Asia, attendance at leading museums has surpassed pre-pandemic levels, hitting 106%. Meanwhile, annual attendance at the top museums in EMEA and North America is still slightly below 2019 figures, at 87% and 90%, respectively.

In Asia, the increases are essentially due to China, where governmental policies have led to the rapid development of new museums. EMEA's recovery struggles are harder to pinpoint, though challenges within the U.K. continue to linger. North America is dealing with weaker demand from international tourism and in the midst of a major reinvestment period that is long overdue.

North America

Most museums in North America continued steadily on the road to recovery, though at this point many are considering 2023 attendance as their new baseline. Collectively, North American museums grew 34% over 2022 and achieved 90% of 2019 levels. Recovery levels, growth, and museum performance do not appear to vary based upon geography, museum type, or whether or not they have free or paid admission. Instead, recovery appears to be most closely tied to reliance on tourist markets, tourism recovery, and reinvestment into new visitor experiences.

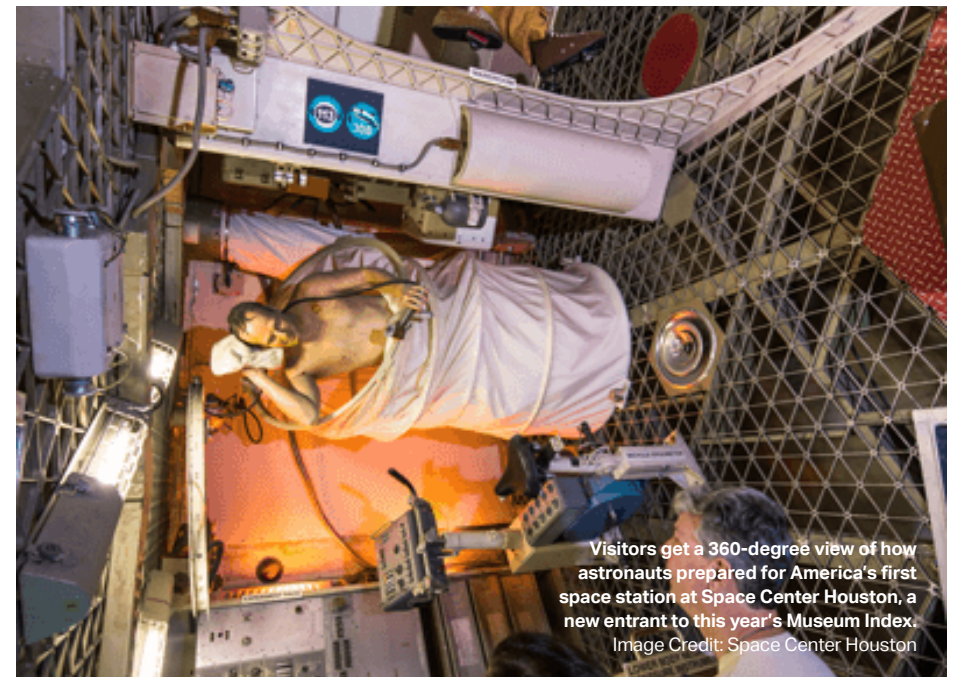
With 2023 being the first full year without major Covid-related restrictions or staffing shortages, we expected to see the most typical year since the pandemic began. But the results don't fully support that.

Outbound travel from the U.S. has been on the rise, which might be displacing some museum visits from domestic tourists.

International inbound travel to the U.S. remains below pre-pandemic levels, even into 2024. Relevant factors, according to analysts, include a strong dollar, the global macroeconomic slowdown, long visa wait times, and limited investment in new facilities and infrastructure.

Many museums on our list are well-known, iconic institutions situated in large urban markets with significant tourism, resulting in a relatively higher ratio of tourists compared to their counterparts in smaller markets. While some museums have successfully replaced the reduced number of tourist visits with local residents through innovative programming, temporary exhibits, food and beverage-centered events, and membership strategies, others have faced challenges in maintaining attendance, especially with the rising competition from

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If we analyze pandemic recovery trends, attendance at the top 60 museums globally reached 94% of 2019 levels.
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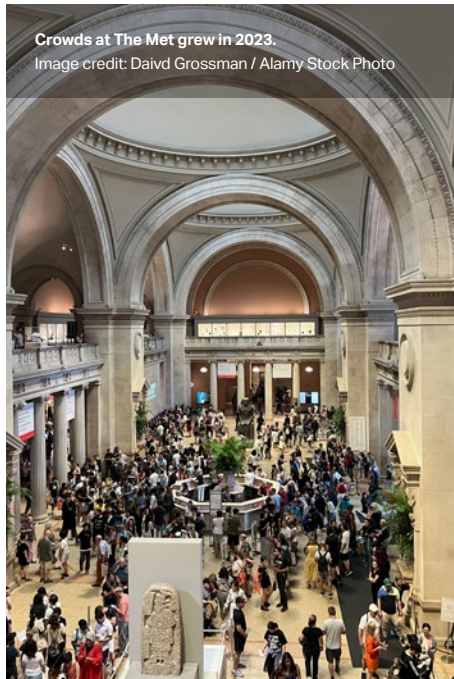


Visitors get a 360-degree view of how astronauts prepared for America's first space station at Space Center Houston, a new entrant to this year's Museum Index. Image Credit: Space Center Houston

immersive traveling exhibits and other new entertainment options

Of the North American list, 60% of museums are or have recently engaged in major capital campaigns for reinvestment into the visitor experience. For many, this investment means more effectively competing with other leisure destinations and attractions that were quick to adopt immersive and media-rich experiences. Importantly, the investments are working. Growth in attendance has tended to follow new exhibits and development.

In New York City, the American Museum of Natural History's (AMNH) new Gilder Center opened in 2023. This eagerly anticipated 230,000-square-foot, \$465 million investment connected several buildings on campus with an architecturally unique structure that includes an immersive theater experience, a new butterfly conservatory, insectarium, substantial education space, and more.



Crowds at The Met grew in 2023.
Image credit: David Grossman / Alamy Stock Photo

Also in New York, the Metropolitan Museum of Art (The Met), while not fully recovered, showed tremendous growth – up 2.2 million or 67% from 2022 – and has also announced plans to replace the Tang Wing with a new 125,000-square-foot building, anticipated to be a \$500 million project that is projected to open in 2029. Meanwhile, the Museum of Modern Art (MoMA) was finally able to benefit from their \$450 million, 47,000-square-foot expansion, which was completed just prior to the pandemic. Attendance at MoMA grew from close to 2.2 million in 2022 to over 2.8 million in 2023, a gain of 30%.

In Washington, D.C., tourism has fully recovered. Looking at the Smithsonian network, the National Museum of Natural History's numbers reflect this return with attendance that is 105% of 2019 levels. The National Air and Space Museum is five years into a seven-year, approximately \$1 billion renovation, with 2023 attendance still lagging due to continued work on galleries at the museum. When it fully opens in 2026, in time for the museum's 50th anniversary and the United States' 250th birthday, we expect to see a major boost in attendance.

The newly renamed Griffin Museum of Science and Industry in Chicago (formerly MSI Chicago) has been engaged in a steady stream of investments in the visitor experience for the past few years, which is reflected in a strong 2023 performance, surpassing pre-pandemic attendance. In July 2023, the museum opened The Blue Paradox, a very popular immersive exhibit focused on the ocean's plastic crisis. Prior to that the museum hosted a preview of the SpaceX Dragon, which is now part of the recently renovated Henry Crown Space Center. In 2024, the highly anticipated Griffin Studio opened with Notes to Neurons, a multimedia experience utilizing immersive audio, gesture, and movement recognition to engage visitors on a journey to discover the power of music in our lives. These exhibits were supported by a \$125 million gift from



The Blue Paradox at the newly renamed Griffin Museum of Science and Industry in Chicago opened in 2023 as a powerful, immersive experience allowing visitors to explore the impact plastic pollution has had on the ocean.
Image Credit: Griffin Museum of Science and Industry

Ken Griffin. Also in Chicago, the Art Institute of Chicago has plans for transformational investments to visitor spaces, including the Bucksbaum Photography Center, the Nichols Family Skyline Garden, and others.

Reinvestment is occurring in cities beyond New York, Washington, D.C., and Chicago. The Denver Museum of Nature and Science, which attracts over 1.3 million on-site visitors in a modest size market (relative to others on the list), is partnering with Denver Parks & Recreation to develop Nature Play, a four-acre immersive experience anticipated to open in 2024 and has also announced a major renovation of its East Wing into an updated campus-style facility with indoor/outdoor spaces and gathering places. Space Center Houston, a new entrant to our list this year with nearly 1.3 million visitors in 2023, is embarking on a facilities masterplan to support the growing need for space exploration, learning and training. And finally, further west, the California Science Center is working on a \$400 million capital campaign

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Of the North American list, 60% of museums are or have recently engaged in major capital campaigns for reinvestment into the visitor experience.
”

for a 200,000-square foot addition, the Samuel Oschin Air and Space Center project.

All of these and more are part of massive investment programs. The lesson? Museums need to consider renewal and reinvestment to avoid attendance decline - a basic tenet that applies to attractions of all types. The intense competition for leisure time and money all along the themed entertainment spectrum (from permanent art collective experiences like Meow Wolf to pop-up IP experiences like Stranger Things and Monopoly Lifesized) means museums must continue to innovate to remain relevant and appeal to audiences.

As a final note, three museums fell off our list this year: the Field Museum of Natural History (Chicago), the National Portrait Gallery and the US Holocaust Memorial Museum (both in Washington, DC); they were replaced by the 9/11 Museum (New York City), National Air and Space Museum's Steven F. Udvar-Hazy Center (Washington, DC), and Space Center Houston.

Asia-Pacific

The story of Asian museums in this year's Museum Index is really the story of China. And what a turnaround story it is! In 2022 Chinese museums fared the worst due to travel and operational restrictions during the pandemic. In 2023, they gained significant ground on the global list and regionally achieved nearly 72 million visits, on par with EMEA.

Chinese museums occupy 14 of the top 20 regional list positions, with several new entrants this year. The government has outlined a plan to become a museum powerhouse by 2035, including the development of 10 to 15 world-class museums, major museums at the provincial

and prefecture levels, smaller museums across the country, and major exhibits on themes such as the Belt and Road Initiative, the Great Wall, and the Grand Canal. It is estimated that more than 20 new museums were built between 2020 and 2023. Chinese museums have benefited from free admission, huge population centers and an improvement in exhibit quality in recent years. However, there are continuing challenges to the Chinese museum industry, including a number of high-profile museum closures, censorship and regulation, "ghost museums" that sit empty or with minimal exhibit content, lack of a sustainable business and operating model, and barriers to entry for international tourists.

Despite operating every day of the week with longer hours in summer, museums in China are seeing low per capita spending. For example, Suzhou Museum, with nearly 4.9 million attendance, reported a per-visitor spend of CNY 15, around \$2. As is the case with other regions, online booking is now ubiquitous in the post-pandemic museum market, and the benefits in visitor management and operations seem to indicate it's likely to stay. Still, some facilities are starting to remove the feature. For example, Hubei Museum eliminated the advance booking requirement and saw its attendance jump to 4.3 million in 2023.

The museum boom in China has also led to some high quality and unique museums that fell short of our list threshold. Of special note, the new Shanghai Astronomy Museum did not make the list but is reportedly the largest planetarium in the world and one of the best museums in China for science. Its 2023 attendance was at 1.08 million, much lower than that of its peers. The museum continues to restrict daily attendance to 4,500 even during the peak summer season, resulting in this lower figure. In addition, specialty museums such as the Beijing Sound Art Museum, the Chengdu Science Fiction Museum, and the

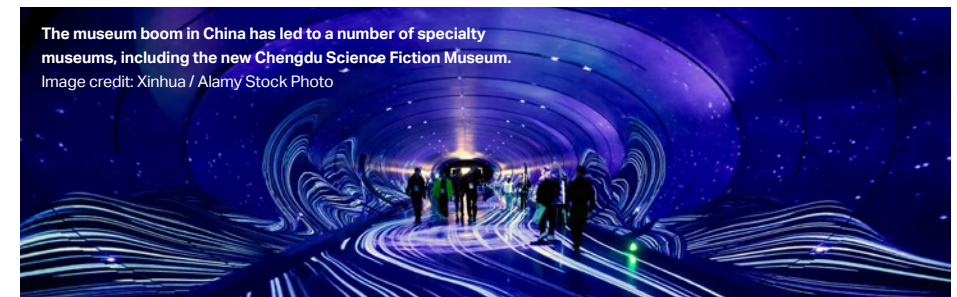
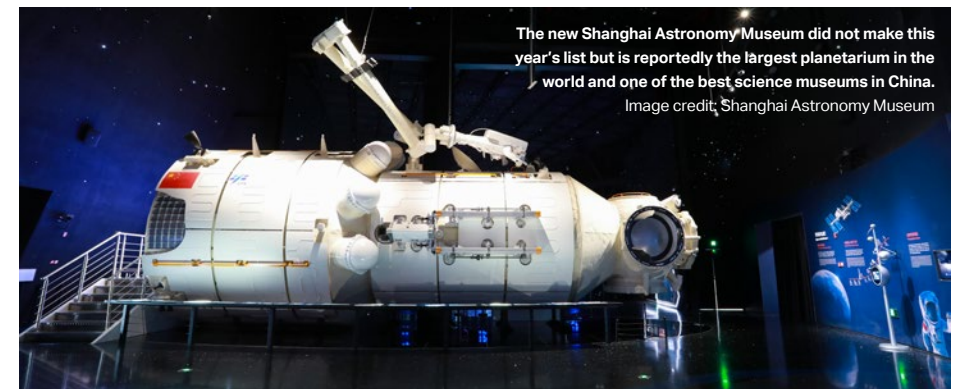
Sui-Tang Dynasties Grand Canal Cultural Museum have recently opened.

In Hong Kong, M+ ended its first year of free admission in 2022, but through high-quality and dynamic exhibits, community programming, international partnerships, and strong support from the Hong Kong government, still achieved a relatively strong attendance number of 2.8 million in 2023. The neighboring Hong Kong Palace Museum brought in about 1.5 million visitors. M+ is more popular with a younger crowd, while the Hong Kong Palace Museum draws older visitors. For both museums, about

30% of the attendance are locals, 20% are international visitors and 50% are Chinese.

Three of Taiwan's science museums – all charging admission – made it to the region's top 20. Coincidentally, the only Japanese museum on the top 20 list, the National Museum of Nature and Science, is also a paid science museum. This reflects both cultures' emphasis on and interest in science education.

“ **The story of Asian museums in this year's index is really the story of China...Chinese museums occupy 14 of the top 20 regional list, with several new entrants this year.** ”



EMEA

In some ways, Europe mirrored North America. Both returned 2023 numbers at close to 90% of 2019. Similarly, there's no real geographic pattern to which ones performed better than others. Eight museums on our list reached pre-pandemic levels.

The State Russian Museum in St. Petersburg performed the best, possibly due to outbound travel sanctions encouraging Russians to explore more within the country. Russia's other major museums generally struggled in 2023, likely due to a lack of international tourism.

Rijksmuseum in Amsterdam returned to pre-pandemic performance with year-over-year growth of 53% - the highest and most impressive of all museums on the list. This performance was supported by a blockbuster Vermeer exhibition.

Museums located in regions with booming tourism saw notable attendance increases. The Museo Nacional del Prado also saw strong year-over-year growth of 36%, propped up by record-breaking tourism to Madrid in 2023 and a strong exhibit and events program.

Founded in 2009, the Acropolis Museum saw a 31% increase over 2022, landing a place on our list for the first time. Athens also experienced a record-breaking year for tourism in 2023, with international arrivals up 10% over their previous pre-pandemic high. In addition to State Russian Museum and Acropolis Museum, the Humboldt Forum joined our list for the first time. It opened during the height of Covid and is only just starting to realize its potential, having already become Germany's most-visited art museum.

The Louvre in Paris continues in the top spot on the list. The Louvre Abu Dhabi

doesn't quite make it but did welcome a commendable 1.2 million visitors in 2023, making it the most-visited museum in the Middle East.

The United Kingdom's museum performance in 2023 remained a mixed bag with the top 10 museums still down 15% from 2019 levels, despite international tourism only being down 7% for the same period. The National Gallery in London was the worst performer with recovery tracking at just 52%. However, large parts of the gallery are under refurbishment and reopening is scheduled for 2025, suggesting a further year of suppressed visitor numbers.

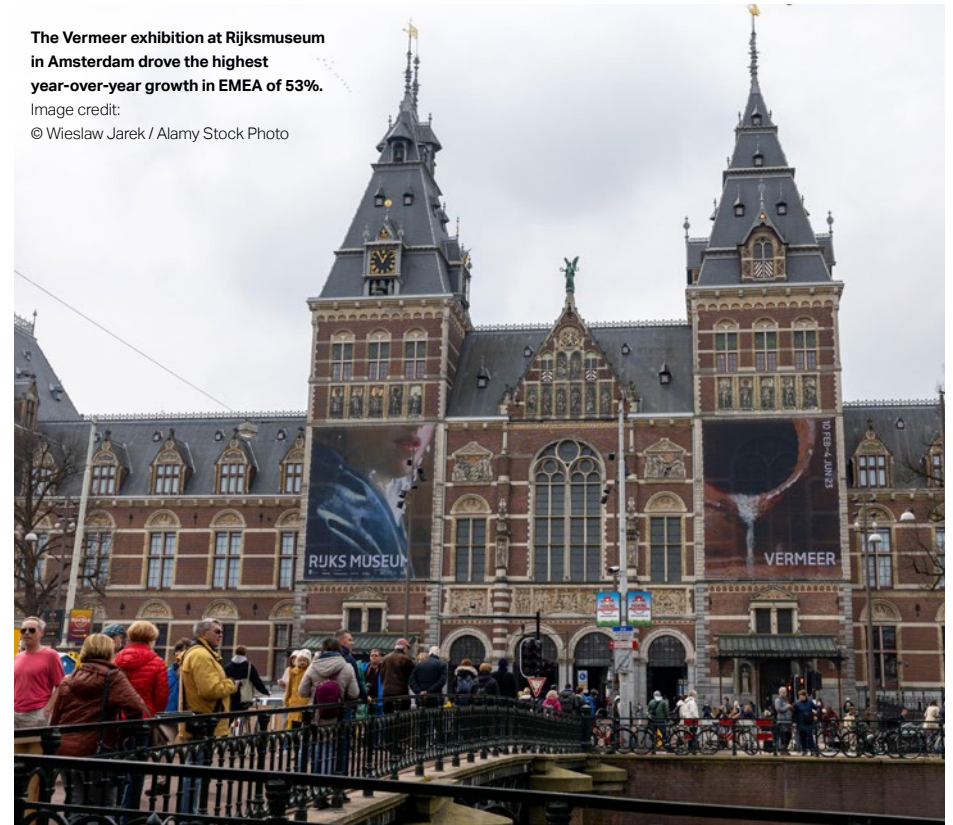
Throughout the region, many museums have continued to implement advanced booking systems, with some facilities (notably in London) also instituting attendance caps to ensure a more pleasant visitor experience during busier times.

Looking forward

The past few years have been a time of significant transformation in the museum industry, with both challenges and opportunities. In some ways, the pandemic acted as a catalyst for museums. It allowed them to strategically consider investments in the visitor experience, new programming, and different operating and business models to appeal to changing audience interests and increasing competition. Over the next few years, we will begin to understand the impact of these investments on the global museum industry.

The Vermeer exhibition at Rijksmuseum in Amsterdam drove the highest year-over-year growth in EMEA of 53%.

Image credit:
© Wieslaw Jarek / Alamy Stock Photo



New entrant Acropolis Museum benefited from record-breaking tourism in Athens, with international arrivals up 10% over the pre-pandemic high.

Image Credit: Hercules Milas / Alamy Stock Photo

Top 20 Museums Worldwide

2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
1	LOUVRE, PARIS, FRANCE	14.7%	8,860	7,726
2	VATICAN MUSEUMS, VATICAN, VATICAN CITY	33.1%	6,765	5,081
3	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	314.3%	6,757	1,631
4	BRITISH MUSEUM, LONDON, U.K.	42.1%	5,821	4,097
5	NATURAL HISTORY MUSEUM, LONDON, U.K.	22.2%	5,689	4,655
6	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	67.2%	5,364	3,209
7	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	271.4%	5,315	1,431
8	NANJING MUSEUM, NANJING, CHINA	211.0%	5,007	1,610
9	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	NA	5,000	NA
10	SUZHOU MUSEUM, SUZHOU, CHINA	242.4%	4,852	1,417

2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
11	TATE MODERN, LONDON, U.K.	22.1%	4,742	3,883
12	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, D.C.	12.8%	4,400	3,900
13	HUNAN MUSEUM, CHANGSHA, CHINA	260.2%	4,398	1,221
14	HUBEI PROVINCIAL MUSEUM, WUHAN, CHINA	330.0%	4,300	1,000
15	NATIONAL MUSEUM OF KOREA, SEOUL, SOUTH KOREA	22.5%	4,180	3,411
16	GUANGDONG PROVINCE MUSEUM, GUANGZHOU, CHINA	19.0%	4,000	3,360
17	MUSÉE D'ORSAY, PARIS, FRANCE	18.4%	3,871	3,270
18	NATIONAL GALLERY OF ART, WASHINGTON, D.C.	17.6%	3,830	3,256
19	MUSEO NACIONAL DEL PRADO, MADRID, SPAIN	35.9%	3,338	2,457
20	STATE HERMITAGE, ST PETERSBURG, RUSSIA	16.4%	3,274	2,813
TOP 20 ATTENDANCE FROM 2023 AND 2022 (PUBLISHED PRIOR YEAR TOTAL)^		65.9%	99,763	57,130
2023 ATTENDANCE AS % OF 2019 PUBLISHED ATTENDANCE*		94.6%		

© 2024 TEA / AECOM

66%

Top 20 museums worldwide attendance change 2022-23^

99.8m

Top 20 museums worldwide attendance 2023*

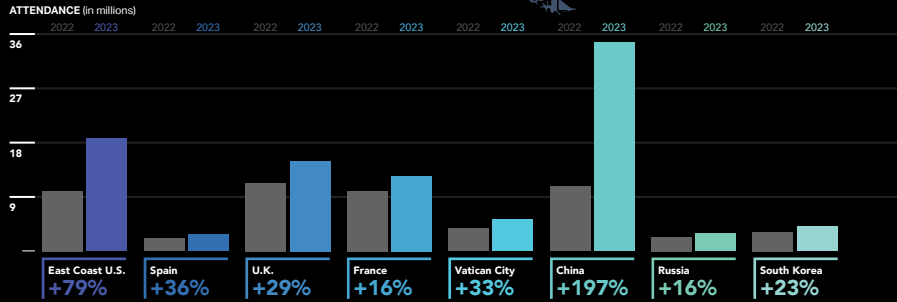
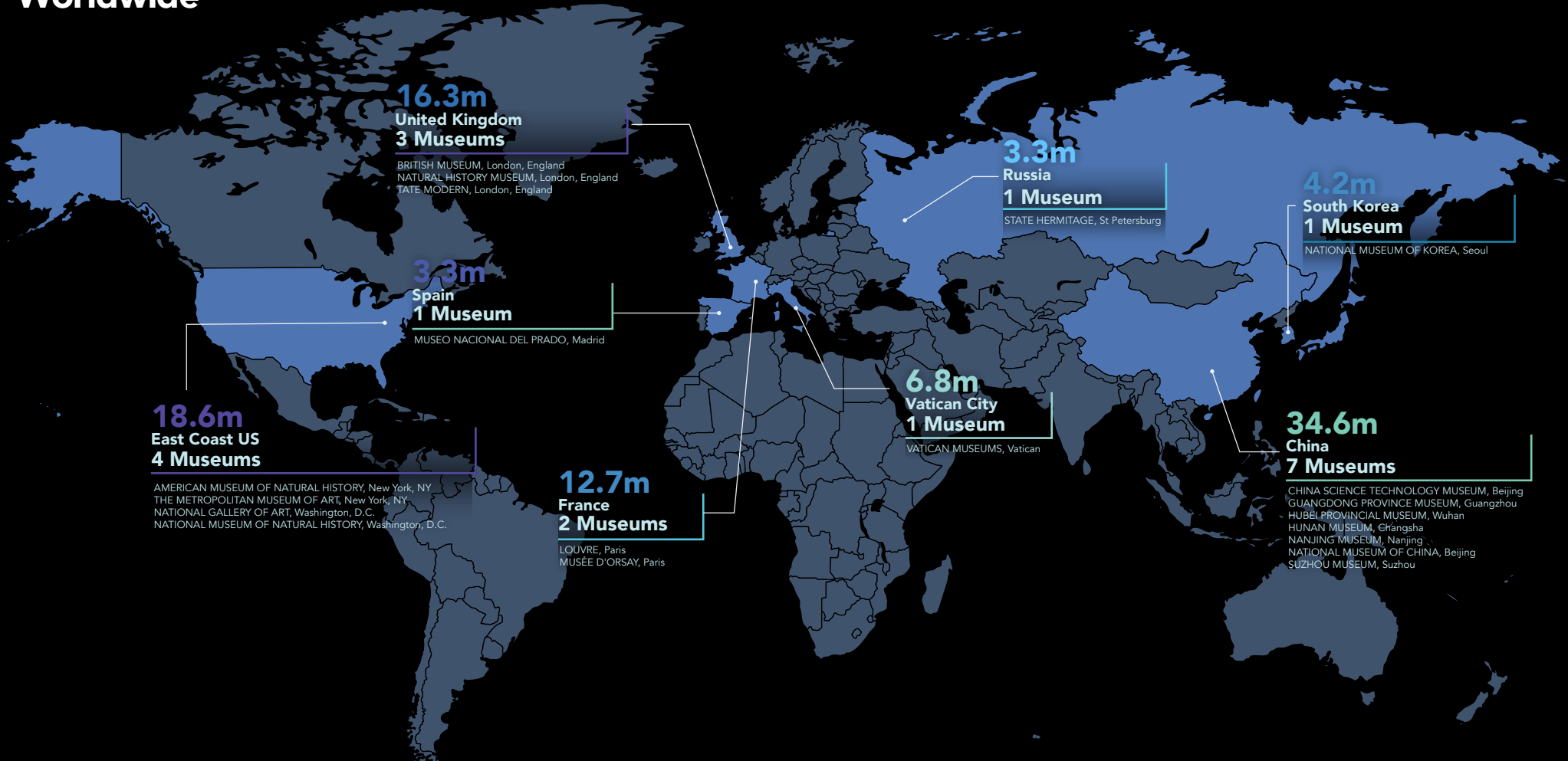
57.1m

Top 20 museums worldwide attendance 2022^*

^Percent change was calculated excluding attendance from non-reporting institutions from 2022

*The parks on this list in the current year may be different than the parks listed in the prior year 2022 or those listed in 2019

Top 20 Museums Worldwide



66%

Top 20 museums worldwide attendance change 2022-23^{^*}

99.8m

Top 20 museums worldwide attendance 2023^{*}

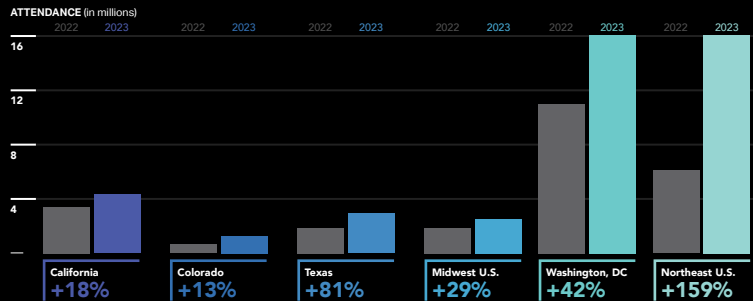
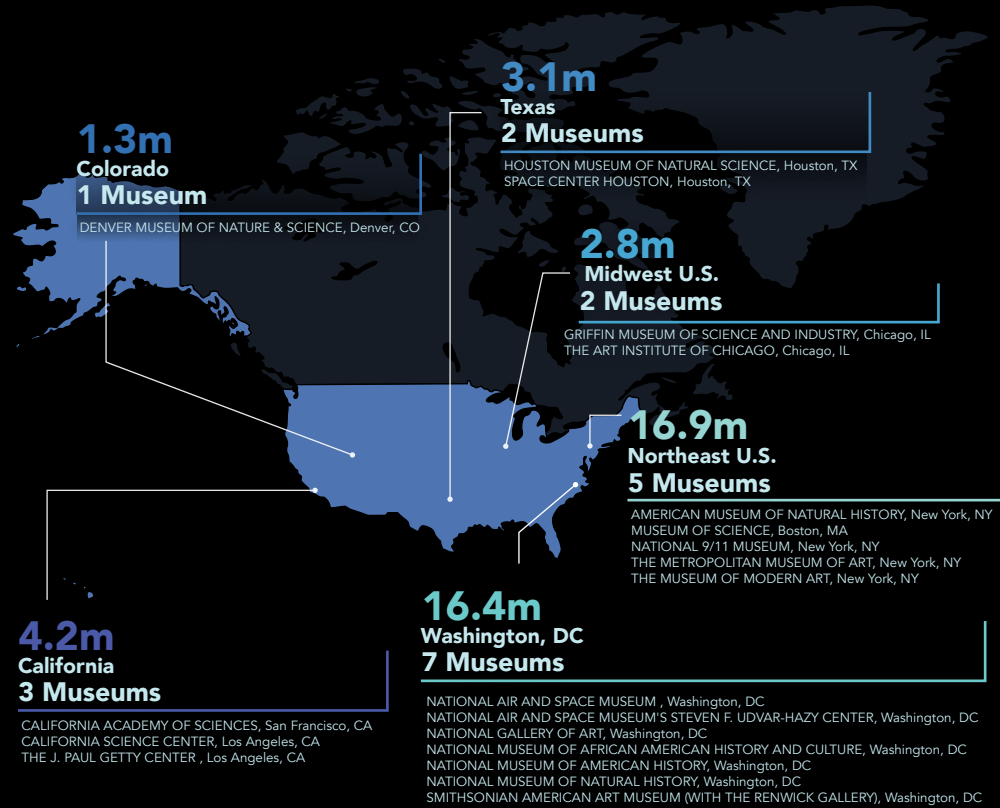
57.1m

Top 20 museums worldwide attendance 2022^{^*}

[^]Percent change calculated excluding attendance from non-reporting institutions from 2022

^{*}The parks on this list in the current year may be different than the parks listed in the prior year 2022 or those listed in 2019

Top 20 Museums North America



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	ATTENDANCE (in thousands)	
			2023	2022
1	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY	67.2%	5,364	3,209
2	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY	NA	5,000	NA
3	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC	12.8%	4,400	3,900
4	NATIONAL GALLERY OF ART, WASHINGTON, DC	17.6%	3,830	3,256
5	THE MUSEUM OF MODERN ART, NEW YORK, NY	29.7%	2,840	2,190
6	NATIONAL 9/11 MUSEUM, NEW YORK, NY	NA	2,265	NA
7	NATIONAL MUSEUM OF AMERICAN HISTORY, WASHINGTON, DC	16.7%	2,100	1,800
8	NATIONAL AIR AND SPACE MUSEUM, WASHINGTON, DC	353.5%	1,900	419
9	HOUSTON MUSEUM OF NATURAL SCIENCE, HOUSTON, TX	5.9%	1,800	1,700
10	CALIFORNIA SCIENCE CENTER, LOS ANGELES, CA	0.4%	1,700	1,694
11	NATIONAL MUSEUM OF AFRICAN AMERICAN HISTORY AND CULTURE, WASHINGTON, DC	46.4%	1,600	1,093
12	GRIFFIN MUSEUM OF SCIENCE AND INDUSTRY, CHICAGO, IL	30.2%	1,476	1,134
13	SMITHSONIAN AMERICAN ART MUSEUM (WITH THE RENWICK GALLERY), WASHINGTON DC	27.3%	1,400	1,100
13	MUSEUM OF SCIENCE, BOSTON, MA	24.7%	1,400	1,123
15	THE ART INSTITUTE OF CHICAGO, CHICAGO, IL	27.5%	1,322	1,037
16	DENVER MUSEUM OF NATURE & SCIENCE, DENVER, CO	13.5%	1,306	1,151
17	SPACE CENTER HOUSTON, HOUSTON, TX	NA	1,270	NA
18	THE J. PAUL GETTY CENTER, LOS ANGELES, CA	37.6%	1,251	909
19	CALIFORNIA ACADEMY OF SCIENCES, SAN FRANCISCO, CA	28.9%	1,245	966
20	NATIONAL AIR AND SPACE MUSEUM'S STEVEN F. UDVAR-HAZY CENTER, WASHINGTON, DC	9.1%	1,200	1,100
TOP 20 ATTENDANCE FROM 2023 AND 2022 (PUBLISHED PRIOR YEAR TOTAL)¹**		33.8%	44,669	29,657
2023 ATTENDANCE AS % OF 2019 PUBLISHED ATTENDANCE²*		89.8%		

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34%
Top 20 museums North America attendance change 2022-23[^]

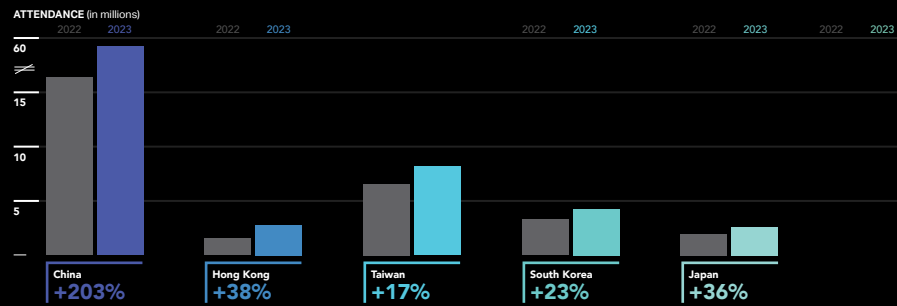
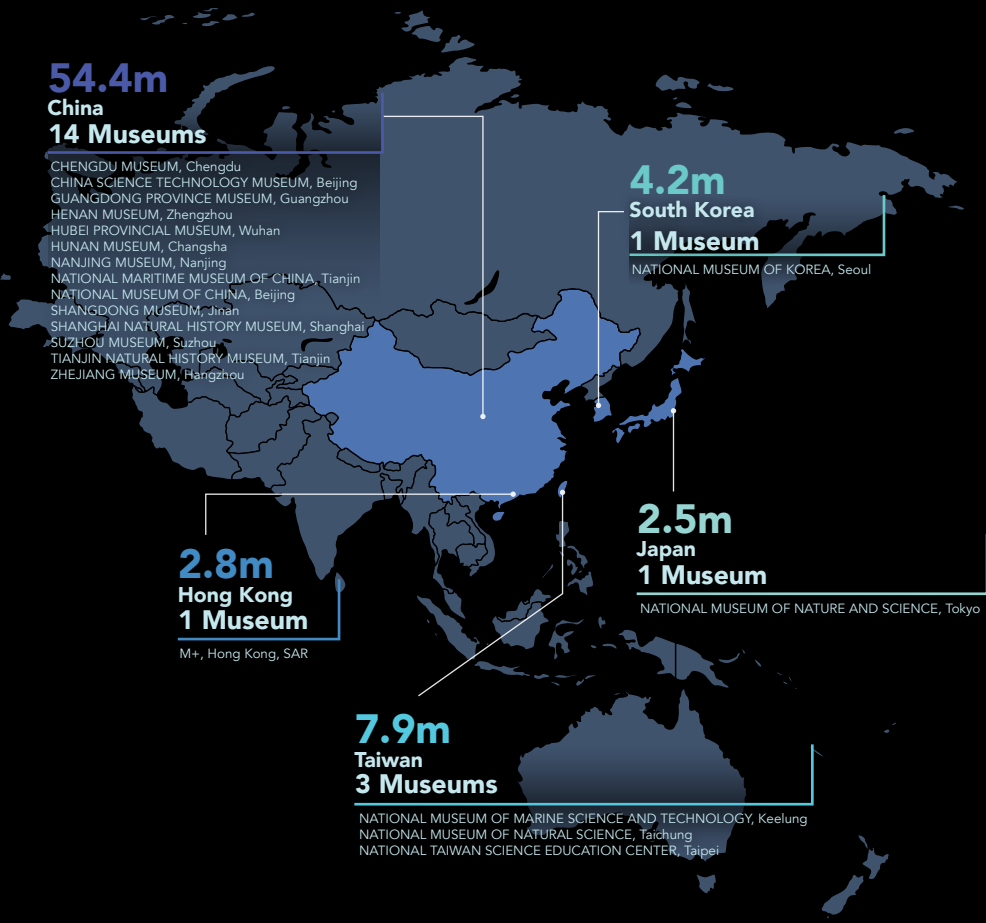
44.7m
Top 20 museums North America attendance 2023^{*}

29.7m
Top 20 museums North America attendance 2022^{**}

¹Percent change calculated excluding attendance from non-reporting institutions from 2022

²The parks on this list in the current year may be different than the parks listed in the prior year 2022 or those listed in 2019

Top 20 Museums Asia-Pacific



2023 RANK	PARK LOCATION	ATTENDANCE (in thousands)	
		2023	2022
1	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	6,757	1,631
2	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	5,315	1,431
3	NANJING MUSEUM, NANJING, CHINA	5,007	1,610
4	SUZHOU MUSEUM, SUZHOU, CHINA	4,852	1,417
5	HUNAN MUSEUM, CHANGSHA, CHINA	4,398	1,221
6	HUBEI PROVINCIAL MUSEUM, WUHAN, CHINA	4,300	1,000
7	NATIONAL MUSEUM OF KOREA, SEOUL, SOUTH KOREA	4,180	3,411
8	GUANGDONG PROVINCE MUSEUM, GUANGZHOU, CHINA	4,000	3,360
9	CHENGDU MUSEUM, CHENGDU, CHINA	3,100	1,405
10	TIANJIN NATURAL HISTORY MUSEUM, TIANJIN, CHINA	3,074	1,321
11	NATIONAL MARITIME MUSEUM OF CHINA, TIANJIN, CHINA	2,900	508
12	M+, HONG KONG, CHINA	2,798	2,034
13	SHANGHAI NATURAL HISTORY MUSEUM, SHANGHAI, CHINA	2,792	532
14	NATIONAL MUSEUM OF NATURAL SCIENCE, TAICHUNG, TAIWAN	2,738	2,300
15	NATIONAL MUSEUM OF MARINE SCIENCE AND TECHNOLOGY, KEELUNG, TAIWAN	2,726	2,582
16	HENAN MUSEUM, ZHENGZHOU, CHINA	2,700	640
17	ZHEJIANG MUSEUM, HANGZHOU, CHINA	2,624	874
18	SHANGDONG MUSEUM, JINAN, CHINA	2,540	962
19	NATIONAL MUSEUM OF NATURE AND SCIENCE, TOKYO, JAPAN	2,500	1,843
20	NATIONAL TAIWAN SCIENCE EDUCATION CENTER, TAIPEI, TAIWAN	2,468	1,879

TOP 20 ATTENDANCE FROM 2023 AND 2022 (PUBLISHED PRIOR YEAR TOTAL)*	167.5%	71,769	26,828
2023 ATTENDANCE AS % OF 2019 PUBLISHED ATTENDANCE*	106.4%		

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168%

Top 20 museums in Asia-Pacific attendance change 2022-23*

71.8m

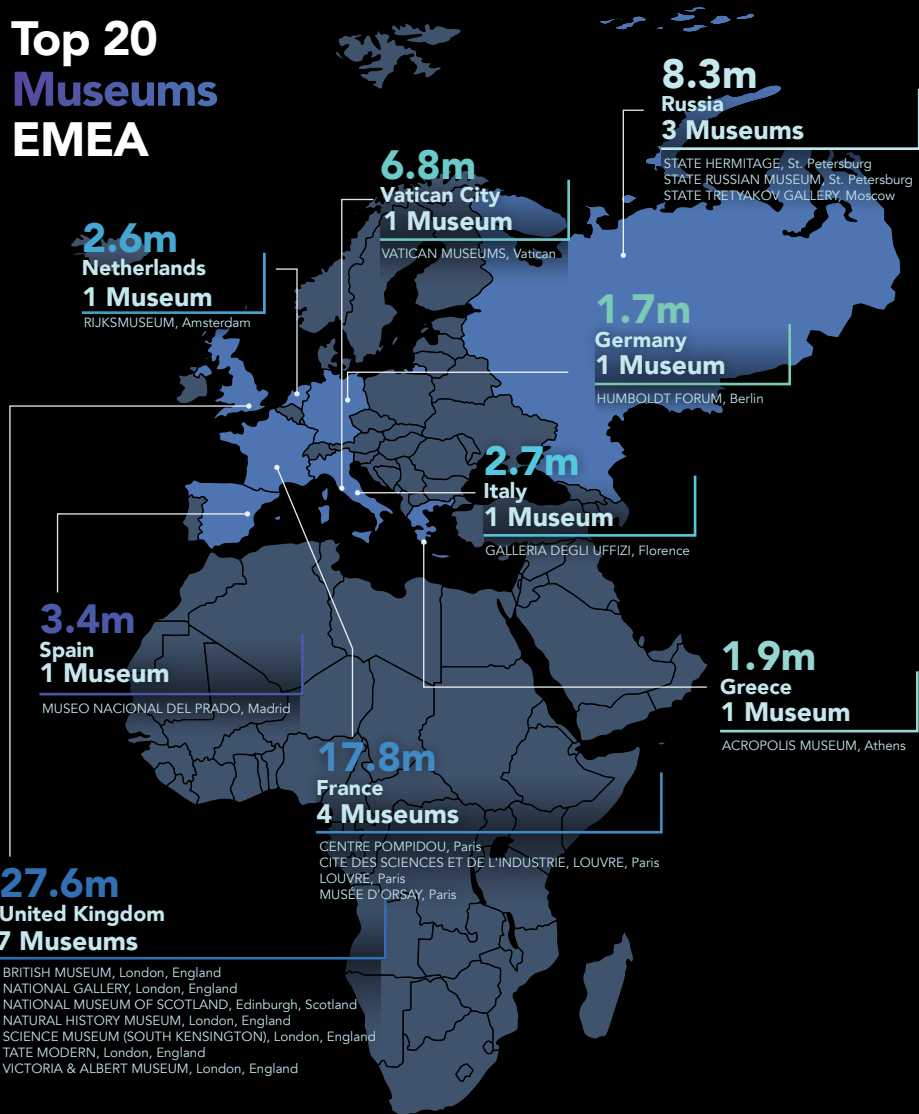
Top 20 museums in Asia-Pacific attendance 2023*

26.8m

Top 20 museums in Asia-Pacific attendance 2022*

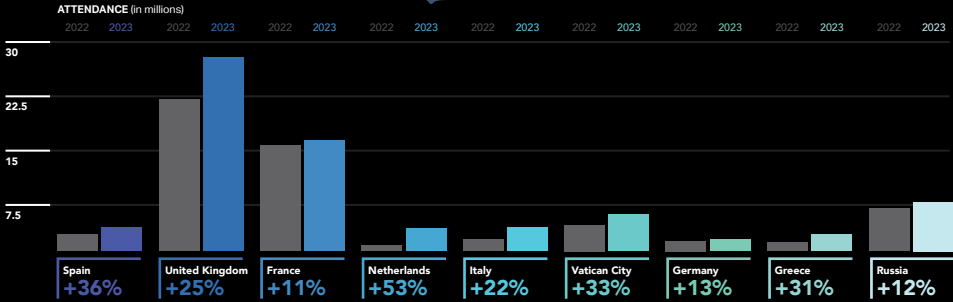
*The museums on this list in the current year may be different than the museums listed in the prior year 2022 or those listed in 2019

Top 20 Museums EMEA



27.6m United Kingdom 7 Museums

- BRITISH MUSEUM, London, England
- NATIONAL GALLERY, London, England
- NATIONAL MUSEUM OF SCOTLAND, Edinburgh, Scotland
- NATURAL HISTORY MUSEUM, London, England
- SCIENCE MUSEUM (SOUTH KENSINGTON), London, England
- TATE MODERN, London, England
- VICTORIA & ALBERT MUSEUM, London, England



2023 RANK	PARK LOCATION	% CHANGE 2022-2023	2023		2022	
			2023	2022	2023	2022
1	LOUVRE, PARIS, FRANCE	14.7%	8,860	7,726		
2	VATICAN MUSEUMS, VATICAN, VATICAN CITY	33.1%	6,765	5,081		
3	BRITISH MUSEUM, LONDON, U.K.	42.1%	5,821	4,097		
4	NATURAL HISTORY MUSEUM, LONDON, U.K.	22.2%	5,689	4,655		
5	TATE MODERN, LONDON, U.K.	22.1%	4,742	3,883		
6	MUSÉE D'ORSAY, PARIS, FRANCE	18.4%	3,871	3,270		
7	MUSEO NACIONAL DEL PRADO, MADRID, SPAIN	35.9%	3,338	2,457		
8	STATE HERMITAGE, ST PETERSBURG, RUSSIA	16.4%	3,274	2,813		
9	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	31.2%	3,110	2,370		
10	NATIONAL GALLERY, LONDON, U.K.	13.6%	3,097	2,727		
11	SCIENCE MUSEUM (SOUTH KENSINGTON), LONDON, U.K.	26.6%	2,957	2,335		
12	STATE RUSSIAN MUSEUM, SAINT PETERSBURG, RUSSIA	9.4%	2,900	2,652		
13	GALLERIA DEGLI UFFIZI, FLORENCE, ITALY	22.3%	2,718	2,223		
14	RIJKSMUSEUM, AMSTERDAM, THE NETHERLANDS	53.1%	2,703	1,766		
15	CENTRE POMPIDOU, PARIS, FRANCE	-12.9%	2,622	3,010		
16	CITE DES SCIENCES ET DE L'INDUSTRIE, PARIS, FRANCE	16.9%	2,456	2,101		
17	NATIONAL MUSEUM OF SCOTLAND, EDINBURGH, U.K.	10.8%	2,187	1,974		
18	STATE TRETYAKOV GALLERY, MOSCOW, RUSSIA	9.9%	2,100	1,910		
19	ACROPOLIS MUSEUM, ATHENS, GREECE	31.1%	1,904	1,452		
20	HUMBOLDT FORUM, BERLIN, GERMANY	13.3%	1,700	1,500		

TOP 20 ATTENDANCE FROM 2023 AND 2022 (PUBLISHED PRIOR YEAR TOTAL)*	21.4%	72,814	59,991
2023 ATTENDANCE AS % OF 2019 PUBLISHED ATTENDANCE*	86.9%		

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21%

Top 20 museums in EMEA attendance change 2022-23

72.8m

Top 20 museums in EMEA attendance 2023*

60.0m

Top 20 museums in EMEA attendance 2022*

*The parks on this list in the current year may be different than the parks listed in the prior year 2022 or those listed in 2019

About the Study

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

This is the eighteenth 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 some 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.

Beth Chang has worked on every edition of the TEA/AECOM Theme Index since 2011. She is currently serving on the TEA Asia Pacific Board. Over her 26-year career in the economics of entertainment, Beth has worked with many leading companies and projects around the world.

Martin Palicki has reported on the Theme Index for many years in his publication, InPark Magazine, and frequently can be seen taking photographs at TEA events. This marks his third year as editor of the Theme Index. Martin also collaborates with TEA on production of the Thea Awards Program and the SATE North America and INSPIRE programs.

Frequently Asked Questions

Did you re-rank the parks and museums for 2023?

Yes. For this 2023 report we returned to ranking parks and museums based on attendance. Due to the Covid-19 global pandemic, AECOM froze the rankings from 2019 for the 2020, 2021 and 2022 reports. Varying responses to the pandemic and government restrictions created an uneven playing field for parks and museums and updating rankings would have presented an incomplete and misleading picture of the industry. Additionally, by comparing the same set of parks, we were able to better track the industry's recovery during that period. Throughout 2023, nearly all pandemic restrictions directly affecting operations were lifted, so we returned to our normal ranking and methodology for all theme parks, water parks and museums.

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 overreporting 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.

Overreporting 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, overreporting 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 of 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:

- 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



Beth Chang
Executive Director –
AECOM Economics,
Asia-Pacific



Martin Palicki
Editor –
TEA/AECOM Theme Index

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 one of the most-attended operators globally with attendance of 62 million in 2023, 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 cities, particularly top tourist destinations, with highly recognized individual brands (e.g., Madame Tussauds, SeaLife, the Dungeons).

Similarly, with over 19 million visitors in 2023, Parques Reunidos focuses largely on a wide variety of attraction types, including amusement parks, zoos, aquariums, and FECs, primarily located in the EMEA region, but with a growing portfolio in North America (via its subsidiary Palace Entertainment). Clearly both Merlin Entertainments and Parques Reunidos have developed effective strategies to attract large numbers of visitors overall to their respective attraction portfolios, but a combination of factors - such as their location, focus, and scale - inhibits most of their properties from reaching levels for inclusion in the Theme Index.

TEA and AECOM express thanks to the numerous park and museum operators who graciously and generously furnished attendance information, enabling this report to be as complete and accurate as possible.

About AECOM

AECOM is the world's trusted infrastructure consulting firm, delivering professional services throughout the project lifecycle - from advisory, planning, design and engineering to program and construction management. On projects spanning transportation, buildings, water, new energy and the environment, our public- and private-sector clients trust us to solve their most complex challenges. Our teams are driven by a common purpose to deliver a better world through our unrivaled technical and digital expertise, a culture of equity, diversity and inclusion, and a commitment to environmental, social and governance priorities. AECOM is a Fortune 500 firm and its Professional Services business had revenue of \$14.4 billion in fiscal year 2023.

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

About the Themed Entertainment Association (TEA)

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

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

aecom.com/theme-index

teaconnect.org/tea-theme--museum-index.html

