

THEME INDEX MUSEUM INDEX 2019

GLOBAL ATTRACTIONS
ATTENDANCE REPORT

AECOM

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ENTERTAINMENT
ASSOCIATION

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Star Wars: Galaxy's Edge, Disneyland Park, Anaheim, CA, U.S.
Photo courtesy of Disney

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GLOBAL ATTRACTIONS ATTENDANCE REPORT

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

Published by the Themed Entertainment Association (TEA) and the Economics practice at AECOM.

8.0%

China Dinosaur Park,
Changzhou, China,
attendance growth
2018–19

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THE BIG PICTURE

4.0%

Top 10 theme park groups worldwide attendance growth 2018–19

521.2m

Top 10 theme park groups worldwide attendance 2019

501.2m

Top 10 theme park groups worldwide attendance 2018



JOHN ROBINETT

Senior Vice President – Economics



9.1m

Universal Studios
Hollywood, Universal City,
CA, U.S., attendance 2019

STABLE 2019 SETS STAGE FOR COMING CHALLENGES

While 2020 has been a year of great challenges for the global visitor attractions industry, our report, as always, focuses on the results of the previous year, in this case, 2019. We will share some brief comments about 2020 at the end of this column and in selected sections of this report, with detailed analysis to follow, of course, in next year's edition.

After clearing the half billion attendance mark in 2018, the world's top theme parks, water parks and attractions continued to climb to 521m in 2019 for a 4.0% annual growth rate as represented by the top 10 attraction groups.

The Asian operators once again dominated — with OCT, Chimelong, and Fantawild all reporting high single- or double-digit increases. In the West, Cedar Fair led the pack with visitation up 8.0%, which included the acquisition of several water parks.



Universal Studios Hollywood, Universal City, CA, U.S.
© Universal Studios Hollywood

Looking at the top 20 theme parks in the various global markets showed general stability in 2019 with modest growth rates. Asia's top parks expanded at roughly 2.0%, slightly down from the previous year, with China in general, and OCT in particular, delivering strong performances. EMEA had mixed results this year with Merlin's LEGOLAND parks showing consistent, mid-single digit growth, Germany's parks doing well, and Parc Astérix (France) up 7.0%.

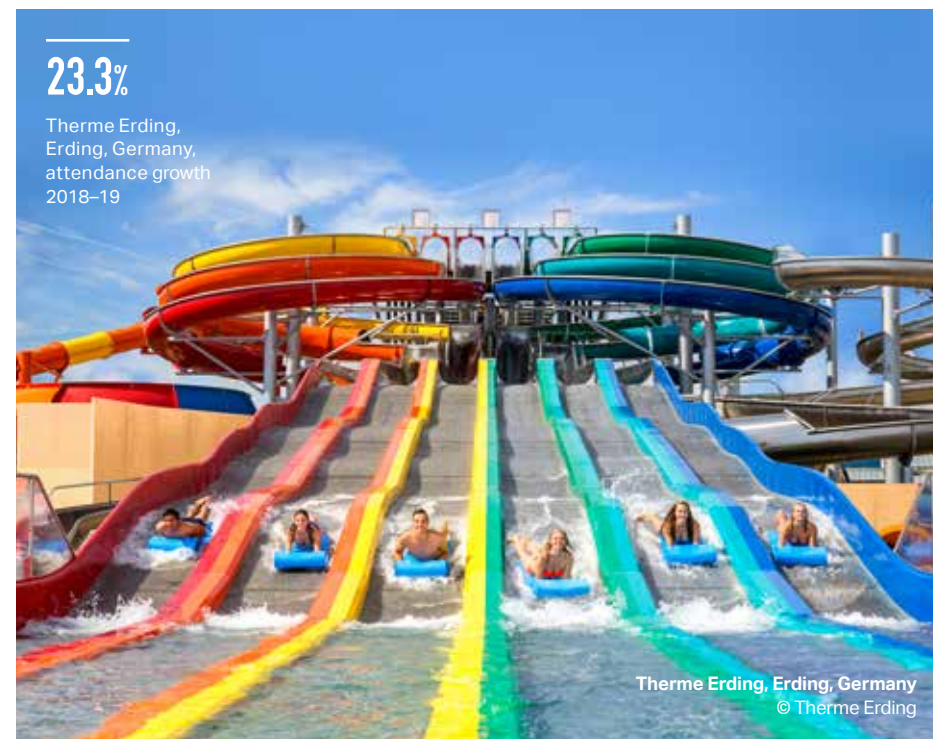
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THE ATTRACTIONS INDUSTRY IS RESILIENT, CREATIVE AND RESPONSIVE TO THE NEEDS OF ITS GUESTS.

Overall, EMEA was relatively flat in 2019. North American parks advanced at a modest rate of 1.0% with Universal's Islands of Adventure producing the best results at 6.0%, followed by Canada's Wonderland at 4.0%, and Knott's Berry Farm at 3.0%. Latin American parks were flat as a whole.

Water parks fared about the same as theme parks this year with a slight increase of 0.6%. Contributors were a number of strong Asian parks, and Therme Erding in Germany whose seasonal investments delivered a notable 23.0% increase in volume.

Museums in Europe had positive results off the back of some major exhibits expanding attendance by over 4.0%. While Asian Museums had stable attendance, overall global market share in the top visited museums increased. North America came down off a big exhibit year in 2018 and was also impacted by a re-calibration of Smithsonian numbers which led to a loss of 17.5%.



As a whole, 2019 was a rather mild-mannered year in the industry, with stable results in the established European and American markets being supplemented by moderate growth in Asia. This could indicate that some pre-recessionary pressures were building under the surface before the tectonic COVID-19 shifted the foundation of the world's health and economies.

With respect to the impact of COVID-19, as of this writing major commercial attraction operators are either considering or have opened their attractions for the summer season. Cultural attractions, such as museums and aquariums, are beginning to open — albeit with more caution — in various parts of the world as well.

“

AS A WHOLE, 2019 WAS A RATHER MILD-MANNERED YEAR IN THE INDUSTRY, WITH STABLE RESULTS IN THE ESTABLISHED EUROPEAN AND AMERICAN MARKETS BEING SUPPLEMENTED BY MODERATE GROWTH IN ASIA.

The general sentiment is that with new health and safety measures, many attractions will be able to get back to business this year (although at a different level). Some are predicting 30.0% to 50.0% of normal business volume for the coming months, and surveys show positive demand from the market. However, it may take one to several years to return to pre-COVID operating levels, and the investment horizon of many owners may be altered due to cash flow loss.

Finally, it is worth noting that the industry has undergone major disruptions before — related to health, safety, economic and security issues. While acknowledging the serious nature and consequences of the current pandemic, history shows us that people's behavior, with some exceptions, largely returns to normal once the threat is removed. The attractions industry is resilient, creative, and responsive to the needs of its guests. This — combined with the industry's lasting value of producing family fun, shared experiences, and escape — points to a future of recovery and new innovations as it has in the past.



14.7m

Tokyo DisneySea,
Tokyo, Japan,
attendance 2019

Tokyo DisneySea, Tokyo, Japan
© Tokyo DisneySea

TOP 10 THEME PARK GROUPS WORLDWIDE

RANK	GROUP NAME	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	WALT DISNEY ATTRACTIONS	-0.8%	155,991,000	157,311,000
2	MERLIN ENTERTAINMENTS GROUP	0.9%	67,000,000	66,400,000*
3	OCT PARKS CHINA	9.4%	53,970,000	49,350,000
4	UNIVERSAL PARKS AND RESORTS	2.3%	51,243,000	50,068,000
5	FANTAWILD GROUP	19.8%	50,393,000	42,074,000
6	CHIMELONG GROUP	8.9%	37,018,000	34,007,000
7	SIX FLAGS INC.	2.5%	32,811,000	32,024,000
8	CEDAR FAIR ENTERTAINMENT COMPANY	7.8%	27,938,000	25,912,000
9	SEAWORLD PARKS & ENTERTAINMENT	0.2%	22,624,000	22,582,000
10	PARQUES REUNIDOS	6.2%	22,195,000	20,900,000
TOP 10 ATTENDANCE GROWTH 2018-19		4.0%	521,183,000	501,228,000

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* Adjustment versus the figure we published in last year's report

4.0%

Top 10 theme park groups
worldwide attendance growth
2018-19

521.2m

Top 10 theme park groups
worldwide attendance 2019

501.2m

Top 10 theme park groups
worldwide attendance 2018

TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	0.5%	20,963,000	20,859,000
2	DISNEYLAND PARK, ANAHEIM, CA, U.S.	0.0%	18,666,000	18,666,000
3	TOKYO DISNEYLAND, TOKYO, JAPAN	0.0%	17,910,000	17,907,000
4	TOKYO DISNEYSEA, TOKYO, JAPAN	0.0%	14,650,000	14,651,000
5	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	1.4%	14,500,000	14,300,000
6	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	1.0%	13,888,000	13,750,000
7	EPCOT AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	0.0%	12,444,000	12,444,000
8	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	8.4%	11,736,000	10,830,000
9	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	2.0%	11,483,000	11,258,000
10	SHANGHAI DISNEYLAND, SHANGHAI, CHINA	-5.0%	11,210,000	11,800,000
11	UNIVERSAL STUDIOS FLORIDA AT UNIVERSAL ORLANDO, FL, U.S.	2.0%	10,922,000	10,708,000
12	UNIVERSAL'S ISLANDS OF ADVENTURE AT UNIVERSAL ORLANDO, FL, U.S.	6.0%	10,375,000	9,788,000
13	DISNEY CALIFORNIA ADVENTURE PARK, ANAHEIM, CA, U.S.	0.0%	9,861,000	9,861,000

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
14	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-1.0%	9,745,000	9,843,000
15	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	0.0%	9,147,000	9,147,000
16	EVERLAND, SEOUL, SOUTH KOREA	12.9%	6,606,000	5,850,000
17	LOTTE WORLD, SEOUL, SOUTH KOREA	-0.1%	5,953,000	5,960,000
18	NAGASHIMA SPA LAND, KUWANA, JAPAN	0.5%	5,950,000	5,920,000
19	EUROPA-PARK, RUST, GERMANY	0.5%	5,750,000	5,720,000
20	OCEAN PARK, HONG KONG SAR	-1.7%	5,700,000	5,800,000
21	HONG KONG DISNEYLAND, HONG KONG SAR	-15.0%	5,695,000	6,700,000
22	DE EFTELING, KAATSHEUVEL, NETHERLANDS	-1.7%	5,260,000	5,350,000*
23	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-1.0%	5,245,000	5,298,000
24	OCT HAPPY VALLEY, BEIJING, CHINA	29.6%	5,160,000	3,980,000
25	CHIMELONG PARADISE, GUANGZHOU, CHINA	4.8%	4,905,000	4,680,000
TOP 25 TOTAL ATTENDANCE 2019			253,724,000	251,070,000
TOP 25 ATTENDANCE GROWTH 2018-19		0.7%	253,724,000	251,990,000

© 2020 TEA / AECOM

0.7%

Top 25 amusement/theme parks worldwide attendance growth 2018-19

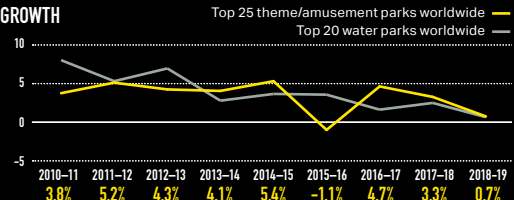
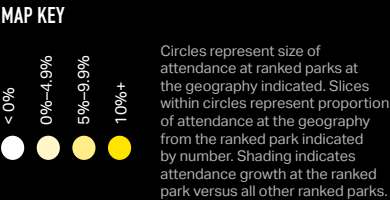
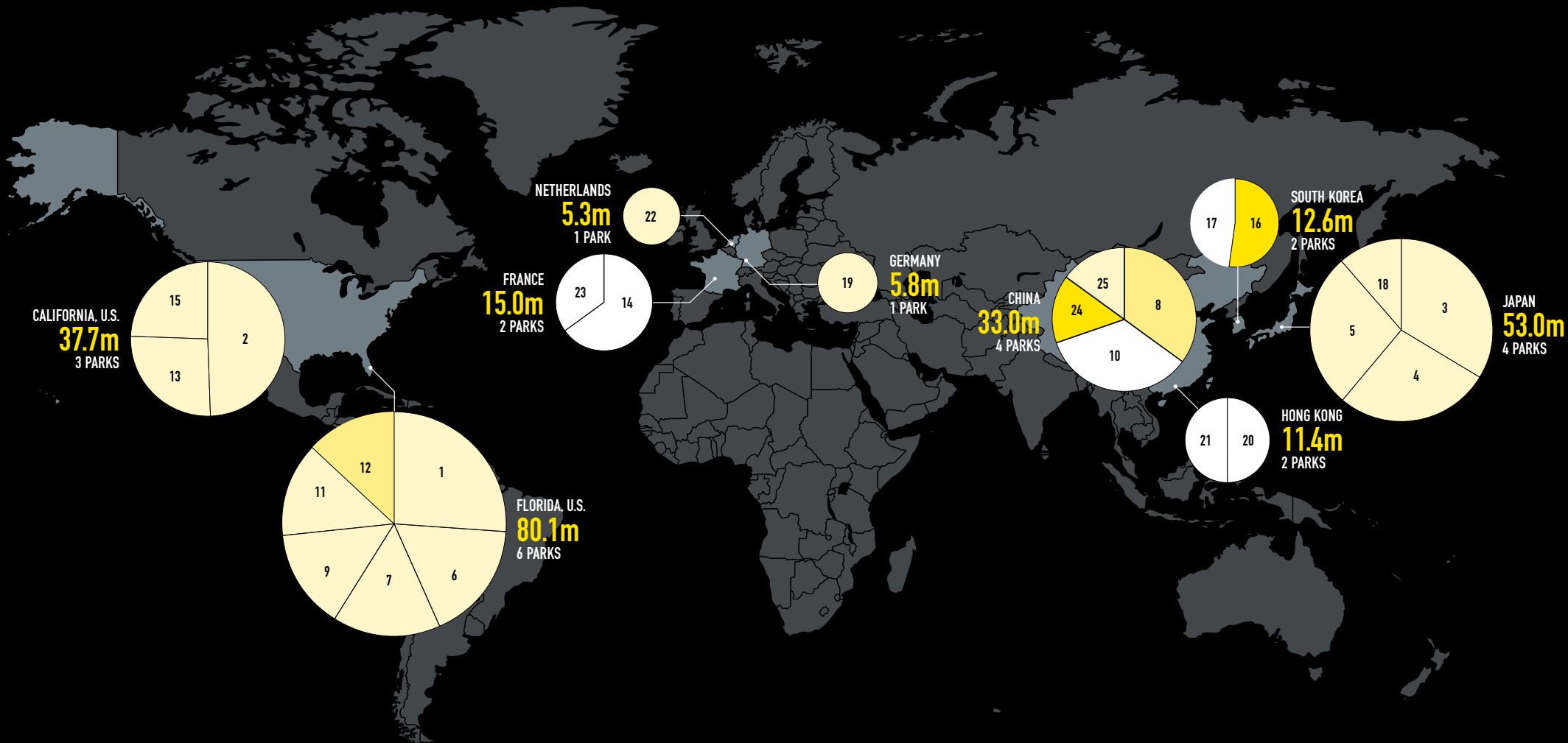
253.7m

Top 25 amusement/theme parks worldwide attendance 2019

252.0m

Top 25 amusement/theme parks worldwide attendance 2018

TOP 25 AMUSEMENT/THEME PARKS WORLDWIDE



0.7%

Top 25 amusement/theme parks worldwide attendance growth 2018-19

253.7m

Top 25 amusement/theme parks worldwide attendance 2019

252.0m

Top 25 amusement/theme parks worldwide attendance 2018

TOP 20 WATER PARKS WORLDWIDE

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	10.0%	3,014,000	2,740,000
2	TYPHOON LAGOON AT DISNEY WORLD, ORLANDO, FL, U.S.	-1.0%	2,248,000	2,271,000
3	BLIZZARD BEACH AT DISNEY WORLD, ORLANDO, FL, U.S.	-1.0%	1,983,000	2,003,000
4	THERME ERDING, ERDING, GERMANY	23.3%	1,850,000	1,500,000
5	THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	-6.4%	1,845,000	1,971,000
6	BAHAMAS AQUAVENTURE WATER PARK, PARADISE ISLAND (NASSAU, NEW PROVIDENCE), BAHAMAS	-1.0%	1,813,000	1,831,000
7	VOLCANO BAY, ORLANDO, FL, U.S.	5.0%	1,811,000	1,725,000
8	AQUATICA, ORLANDO, FL, U.S.	-1.5%	1,533,000	1,556,000
9	HOT PARK RIO QUENTE, CALDAS NOVAS, BRAZIL	2.1%	1,469,000	1,439,000*
10	WUHU FANTAWILD WATER PARK, WUHU, CHINA	-0.9%	1,348,000	1,360,000

RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
11	CARIBBEAN BAY, SEOUL, SOUTH KOREA	11.1%	1,333,000	1,200,000
12	AQUAVENTURE WATER PARK, DUBAI, U.A.E.	-5.4%	1,322,000	1,397,000
13	AQUAPALACE, PRAGUE, CZECH REPUBLIC	0.9%	1,300,000	1,288,000
14	TROPICAL ISLANDS, KRAUSNICK, GERMANY	2.8%	1,233,000	1,200,000
15	PLAYA MAYA WATER PARK, WUHAN, CHINA	12.0%	1,210,000	1,080,000
16	AQUAVENTURE ATLANTIS, SANYA, CHINA	100.0%	1,200,000	600,000
	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	-7.7%	1,200,000	1,300,000
	SIAM PARK, SANTA CRUZ DE TENERIFE, SPAIN	-0.8%	1,200,000	1,210,000
19	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	0.0%	1,120,000	1,120,000
20	OCEAN WORLD, GANGWON-DO, SOUTH KOREA	-15.3%	1,071,000	1,264,000
TOP 20 TOTAL ATTENDANCE 2019			31,103,000	30,055,000
TOP 20 ATTENDANCE GROWTH 2018-19		0.6%	31,103,000	30,919,000

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* Adjustment versus the figure we published in last year's report

0.6%

Top 20 water parks worldwide attendance growth 2018-19

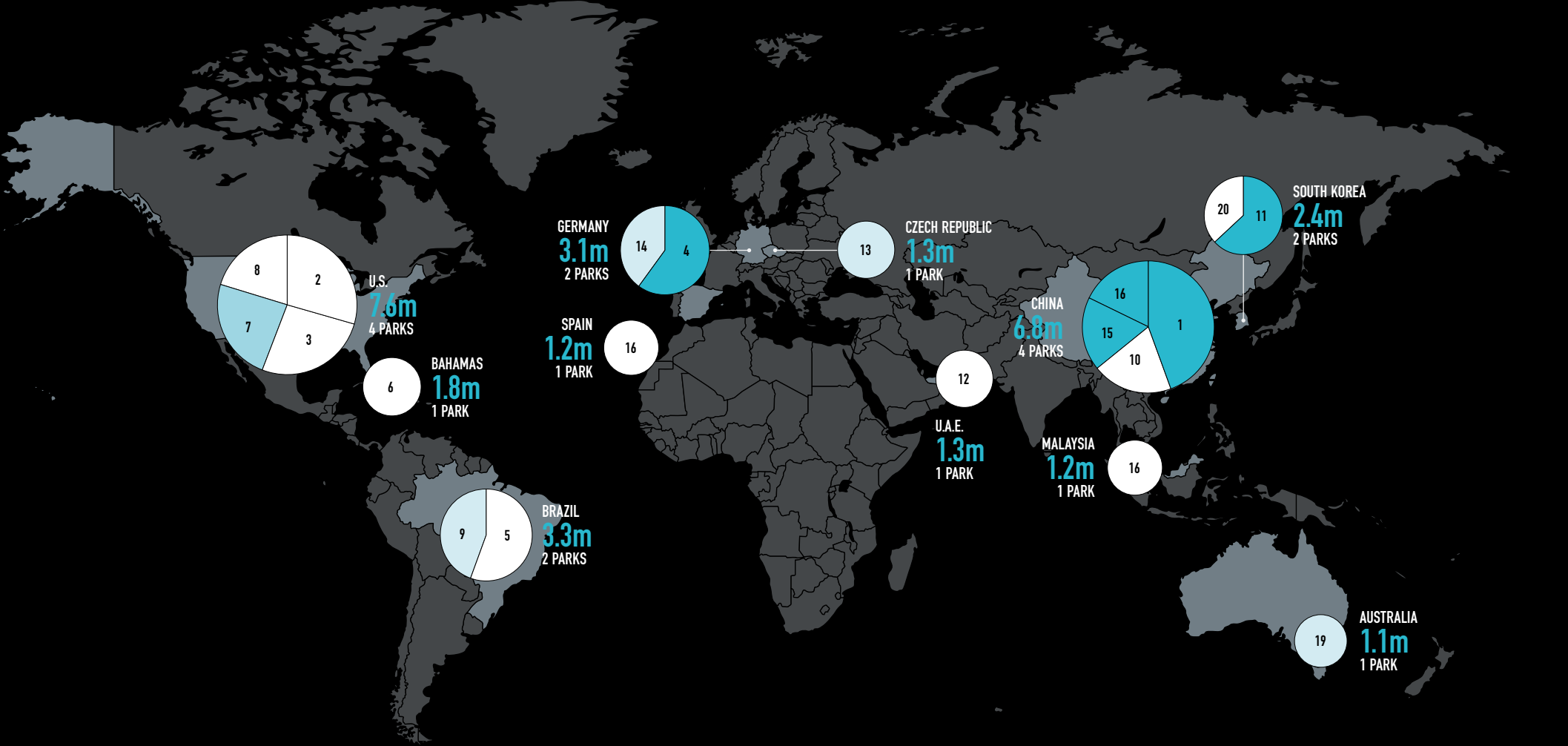
31.1m

Top 20 water parks worldwide attendance 2019

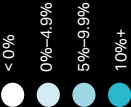
30.9m

Top 20 water parks worldwide attendance 2018

TOP 20 WATER PARKS WORLDWIDE

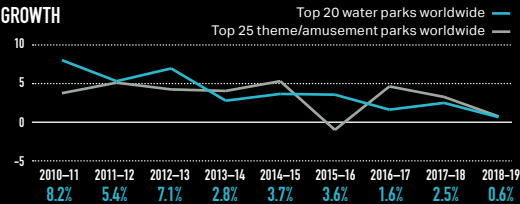


MAP KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked park indicated by number. Shading indicates attendance growth at the ranked park versus all other ranked parks.

GROWTH



0.6%

Top 20 water parks worldwide attendance growth 2018-19

31.1m

Top 20 water parks worldwide attendance 2019

30.9m

Top 20 water parks worldwide attendance 2018

TOP 20 MUSEUMS WORLDWIDE

RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	FREE/PAID
1	LOUVRE, PARIS, FRANCE	-5.9%	9,600,000	10,200,000	P
2	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	-14.2%	7,390,000	8,610,000	F
3	VATICAN MUSEUMS, VATICAN, VATICAN CITY	1.9%	6,883,000	6,756,000	P
4	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	-8.0%	6,770,000	7,360,000	P
5	BRITISH MUSEUM, LONDON, U.K.	5.8%	6,208,000	5,869,000	F
6	TATE MODERN, LONDON, U.K.	4.6%	6,098,000	5,829,000	F
7	NATIONAL GALLERY, LONDON, U.K.	4.8%	6,011,000	5,736,000	F
8	NATURAL HISTORY MUSEUM, LONDON, U.K.	3.8%	5,424,000	5,226,000	F
9	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	0.0%	5,000,000	5,000,000	P
10	STATE HERMITAGE, ST PETERSBURG, RUSSIA	15.4%	4,957,000	4,294,000	P

RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	FREE/PAID
11	SHANGHAI SCIENCE AND TECHNOLOGY MUSEUM, SHANGHAI, CHINA	36.3%	4,824,000	3,540,000	P
12	REINA SOFÍA, MADRID, SPAIN	13.5%	4,426,000	3,898,000	F
13	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC, U.S.	-12.5%	4,200,000	4,800,000	F
14	NANJING MUSEUM, NANJING, CHINA	13.6%	4,169,000	3,670,000	F
15	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-1.2%	4,150,000	4,200,000	F
16	NATIONAL GALLERY OF ART, WASHINGTON, DC, U.S.	-7.5%	4,074,000	4,404,000	F
17	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	-1.2%	3,921,000	3,968,000	P
18	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	-11.6%	3,891,000	4,400,000	P
19	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	-0.7%	3,832,000	3,860,000	P
20	MUSÉE D'ORSAY, PARIS, FRANCE	15.0%	3,652,000	3,175,000	F
TOP 20 TOTAL ATTENDANCE 2019			105,480,000	104,795,000	
TOP 20 ATTENDANCE GROWTH 2018-19		-2.4%	105,480,000	108,080,000	

© 2020 TEA / AECOM

-2.4%

Top 20 museums worldwide attendance growth 2018-19

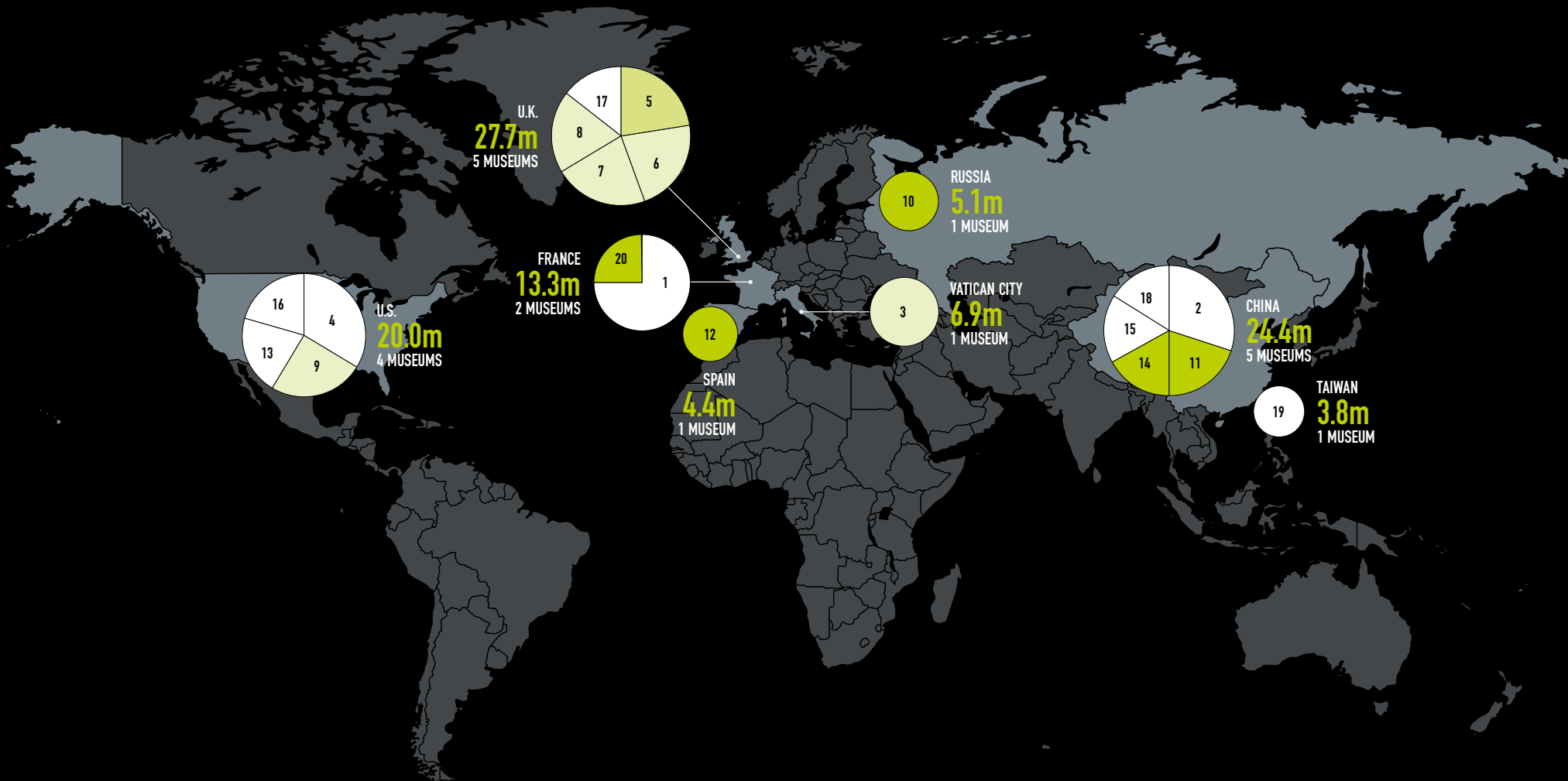
105.5m

Top 20 museums worldwide attendance 2019

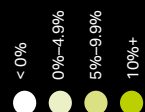
108.1m

Top 20 museums worldwide attendance 2018

TOP 20 MUSEUMS WORLDWIDE

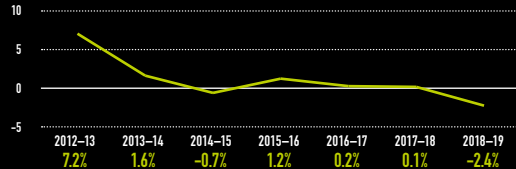


MAP KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked museum indicated by number. Shading indicates attendance growth at the ranked museum versus all other ranked museums.

GROWTH



-2.4%

Top 20 museums worldwide attendance growth 2018-19

105.5m

Top 20 museums worldwide attendance 2019

108.1m

Top 20 museums worldwide attendance 2018

THE AMERICAS

1.0%

Top 20 amusement/
theme parks North
America attendance
growth 2018–19

159.1m

Top 20 amusement/
theme parks North
America attendance
2019

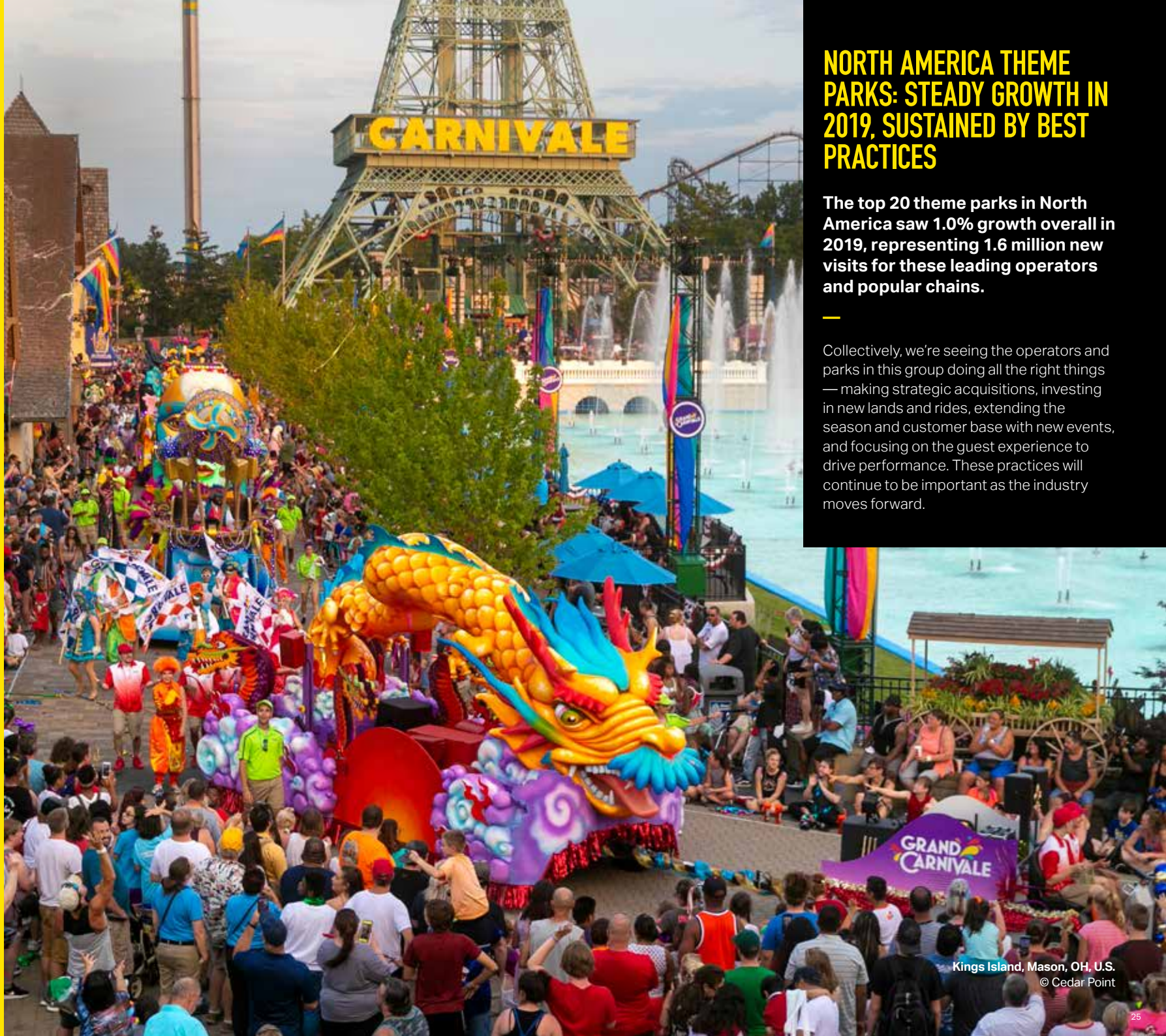
157.5m

Top 20 amusement/
theme parks North
America attendance
2018



KATHLEEN LACLAIR

Associate Principal –
Economics, Americas



NORTH AMERICA THEME PARKS: STEADY GROWTH IN 2019, SUSTAINED BY BEST PRACTICES

The top 20 theme parks in North America saw 1.0% growth overall in 2019, representing 1.6 million new visits for these leading operators and popular chains.

Collectively, we're seeing the operators and parks in this group doing all the right things — making strategic acquisitions, investing in new lands and rides, extending the season and customer base with new events, and focusing on the guest experience to drive performance. These practices will continue to be important as the industry moves forward.

Kings Island, Mason, OH, U.S.
© Cedar Point



6.0%

Universal's Islands of Adventure at Universal Orlando, FL, U.S., attendance growth 2018-19

Universal's Islands of Adventure at Universal Orlando, FL, U.S., © Universal and WBEI. Publishing Rights © JKR.(s20)

Disney, Universal

At Disney's domestic parks, the opening of *Star Wars: Galaxy's Edge* introduced a richly themed new land that takes participatory immersion to new levels, and showcases what Disney does best, immersing guests in storied lands, rides and attractions.

The land and its pioneering rides, *Rise of the Resistance* and *Millennium Falcon: Smugglers Run*, have received accolades, including TEA Thea Awards. Disney's domestic park attendance numbers were flat overall for 2019 compared to the previous year which could be attributed to the operator emphasizing its yield strategy by prioritizing the quality of guest experience and per caps. This operating model has emerged over the last decade and will likely serve operators well moving forward, with respect to capacity limitations in parks and the continued need to stay competitive.

There has been continued investment in Pixar Pier at Disney California Adventure with Jessie's Critter Carousel and Inside Out Emotional Whirlwind in 2019. Set to open soon: Avengers Campus at Disneyland, a strong IP with immense potential for theming within their parks.

Universal Studios North American parks were up 2.8% in 2019, with most of that growth due to strong performance at Universal's Islands of Adventure with the new addition of Hagrid's Magical Creatures Motorbike Adventure steel coaster (soon to receive a TEA Thea Award) within the Wizarding World of Harry Potter. This popular IP continues to drive attendance and performance for Universal, which first debuted the Wizarding World of Harry Potter realm at Islands of Adventure in 2010 — 10 years and still going strong.

Universal Studios Florida continues to benefit from the *Fast and the Furious* franchise as well as more onsite capacity with the Aventura hotel added in 2018.

Of course, the big new IP on the horizon for this operator is Super Nintendo World which will open first at Universal Studios Japan, then within the massive, new Epic Universe in Orlando and eventually at Universal Studios Singapore.

Regional Operators

Cedar Fair reported the strongest increase among the domestic operators, with growth of 7.8% within its full portfolio, which now includes the Schlitterbahn New Braunfels and Schlitterbahn Galveston water parks (acquired mid-summer 2019). Outside the increase in overall attendance from the two new water parks, attendance at the operator's legacy collection of parks increased 5.0%.

Cedar Fair's strategy, and resulting performance, form a strong example for investing and reinvesting, whether in new parks, rides or experiences, to drive attendance and revenues.

Attendance at Canada's Wonderland increased 4.0%, due in part to additional operating days for its new WinterFest event and a new coaster Yukon Striker. Knott's Berry Farm also had a great year, with 3.0% growth, a new PEANUTS celebration and a revamped raft ride, Calico River Rapids.

“

CEDAR FAIR'S STRATEGY, AND RESULTING PERFORMANCE, FORM A STRONG EXAMPLE FOR INVESTING AND REINVESTING, WHETHER IN NEW PARKS, RIDES OR EXPERIENCES, TO DRIVE ATTENDANCE AND REVENUES.



2.0%

Six Flags Great America, Gurnee, IL, U.S., attendance growth 2018-19

Six Flags Great America, Gurnee, IL, U.S. © Six Flags Great America

3.0%

Knott's Berry Farm, Buena Park, CA, U.S., attendance growth 2018–19

Knott's Berry Farm, Buena Park, CA, U.S.
© Knott's Berry Farm



In 2019, SeaWorld Parks and Entertainment was able to maintain the additional visits secured in 2018, continuing its rebound after a series of challenging years leveraging new attractions, improved theming and IP. Sesame Street Land was very well received at SeaWorld Orlando and the operator continues to employ this popular IP with the transition of Aquatica San Diego into a Sesame Place park, slated to open in 2021.

Six Flags reported steady growth, at 2.5%, which represents almost 800,000 new visits, helped by the new Maxx Force coaster at Six Flags Great America near Chicago. The operator acquired five new parks in 2018, which resulted in significantly increased attendance for their portfolio last year, and also continues to please guests with rides and experiences themed on DC Comics stories and characters.

4.0%

Canada's Wonderland, Vaughan, Ontario, Canada, attendance growth 2018–19



Canada's Wonderland, Vaughan, Ontario, Canada
© Canada's Wonderland

NORTH AMERICA WATER PARKS: RAIN OR RIDES?

The top water parks in North America added nearly 200,000 visits in 2019, an increase of 1.2% over 2018.

Orlando's four water parks comprise nearly half of our list's total attendance, and with relatively even market share, especially as Universal's Volcano Bay continues to stabilize within the competitive market. There were no significant changes at Disney's Typhoon Lagoon and Blizzard Beach; SeaWorld's Aquatica added the family-oriented KareKare Curl slide.

Unfortunately, Hurricane Dorian and a wetter than average summer overall led to slight declines in attendance. Outside Florida, these mostly suburban water parks saw a relatively flat year in attendance, with a few exceptions. Zoombezi Bay in Ohio had another strong season with a 6.4% increase, which they attribute to a wide range of factors, including better weather, continued success from the 2018 Otter Banks addition, and new marketing campaigns. Typhoon Texas in Katy also reported record attendance for the second year in a row, with a 6.0% increase. Contributing factors included a switch to dynamic pricing, enhanced marketing and better execution overall — proof that strategies implemented by the big operators can also benefit regional markets and smaller parks.

6.0%

Typhoon Texas, Katy, Texas, U.S., attendance growth 2018–19



Typhoon Texas, Katy, Texas, U.S.
© Typhoon Texas

Other significant reinvestments in 2019 include Water Country USA's Cutback Water Coaster, Aquatica San Antonio's Ihu's Breakaway Falls, Schlitterbahn Galveston's Infinity Racers slides, Six Flags Hurricane Harbor Splashtown, Houston's Wahoo Wave six-story wave wall slide and Six Flags Hurricane Harbor, Jackson's new 100,000-gallon activity pool.

LATIN AMERICA THEME PARKS: UPS AND DOWNS

With visits totaling 15.7 million at the top 10 theme parks in Latin America and Mexico in 2019, attendance overall is flat, showing an increase of just 0.1 % over 2018. In this region, we continue to see three factors play a key role in the success of parks: politics, economics and safety — with positive and negative results.



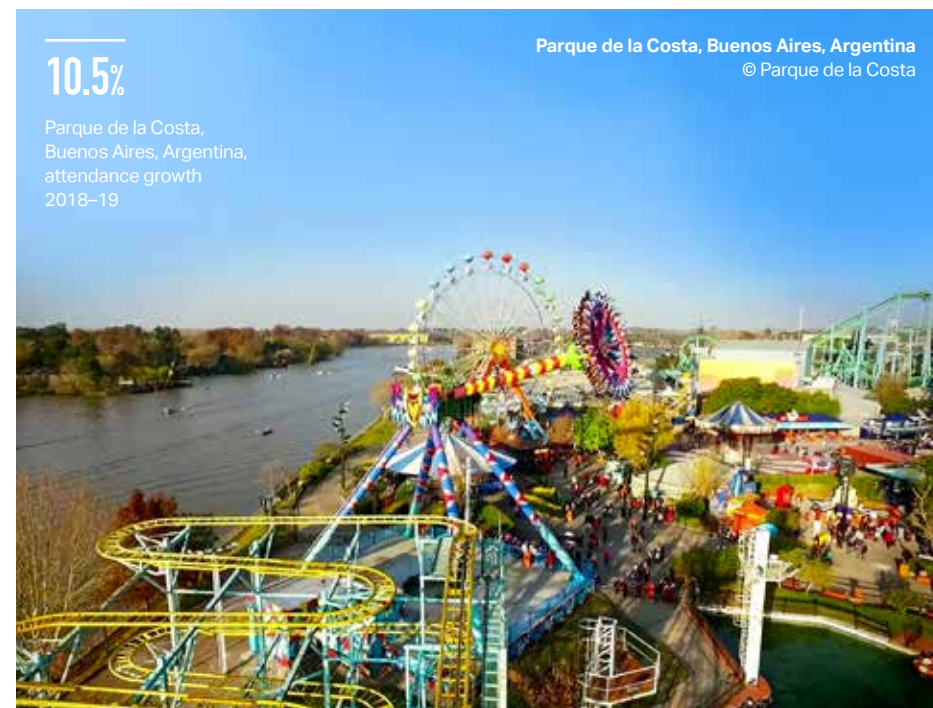
WE CONTINUE TO SEE THREE FACTORS PLAY A KEY ROLE IN THE SUCCESS AT PARKS IN THIS REGION — POLITICS, ECONOMICS AND SAFETY — WITH POSITIVE AND NEGATIVE RESULTS.

That said, there were some notable increases at individual parks in 2019: Parque Xcaret in Cancun, Mexico saw an increase of 4.0% and continues to gain market share after adding another hotel in 2018. Grupo Xcaret has an established record of high quality and smart reinvestment and can now boast a fully integrated destination resort at this location. Parque Mundo Petapa in Guatemala saw an attendance increase of 8.5%, likely due to positive market conditions and a new coaster, Relámpago.

Parque de la Costa in Argentina increased attendance by 10.5%, thanks to good weather, and an increase of domestic visitors. Beto Carrero World in Brazil, which ranks #2 on the top 10 and saw attendance grow by 2.9%, also cited more domestic visitation and the positive economic recovery in Brazil during much of 2019.

Though their visitor numbers weren't high enough to make the Top 10 list this year, two other parks had notable increases. Hopi Hari in Brazil continues to make a comeback from safety and ownership issues, while also benefiting from market conditions, and had an attendance increase of 32.0% in 2019, an encouraging trend. Theme Park Xetulul in Guatemala had an attendance increase of 12.1%, creditable to the area's improved infrastructure and growing destination status.

In Mexico City, La Feria De Chapultepec had previously ranked high in the top 10 before having its license revoked due to a fatal accident. At this writing, the property was closed and ripe for acquisition, with signs of interest from major operators.



10.5%

Parque de la Costa,
Buenos Aires, Argentina,
attendance growth
2018–19

Parque de la Costa, Buenos Aires, Argentina

© Parque de la Costa



8.5%

Mundo Petapa,
Guatemala City,
Guatemala, attendance
growth 2018–19

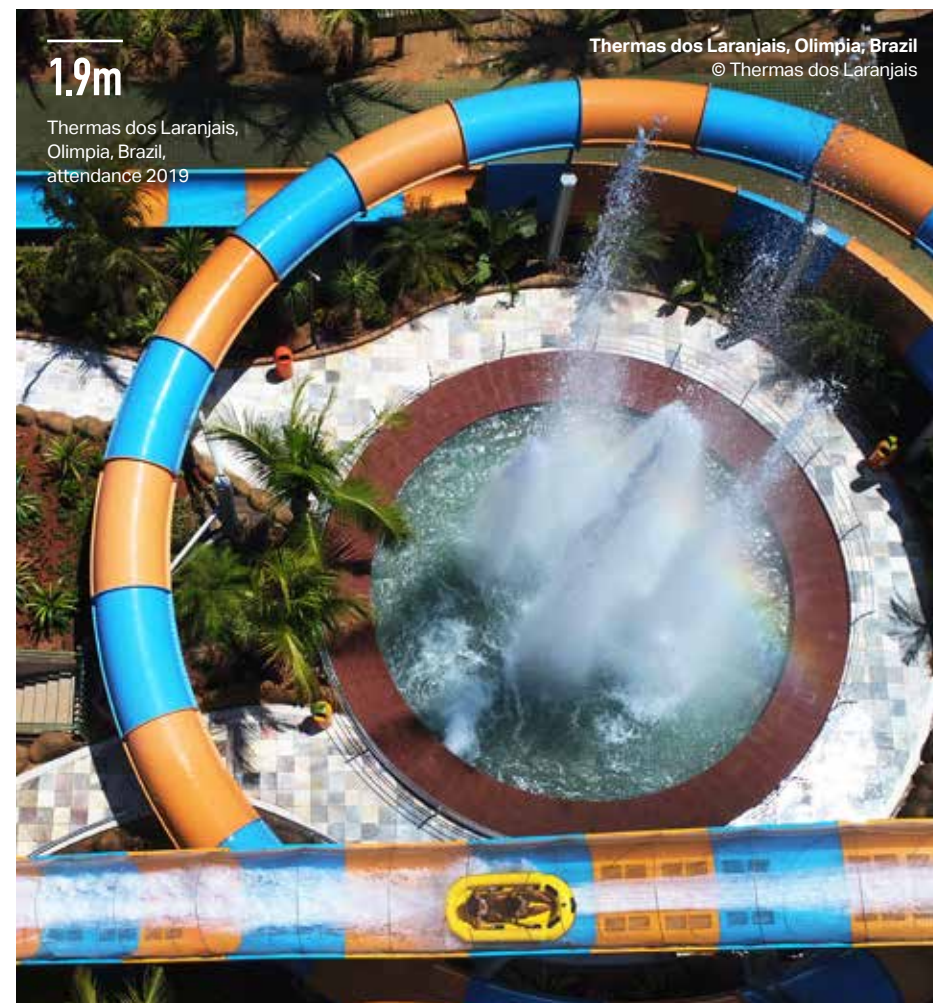
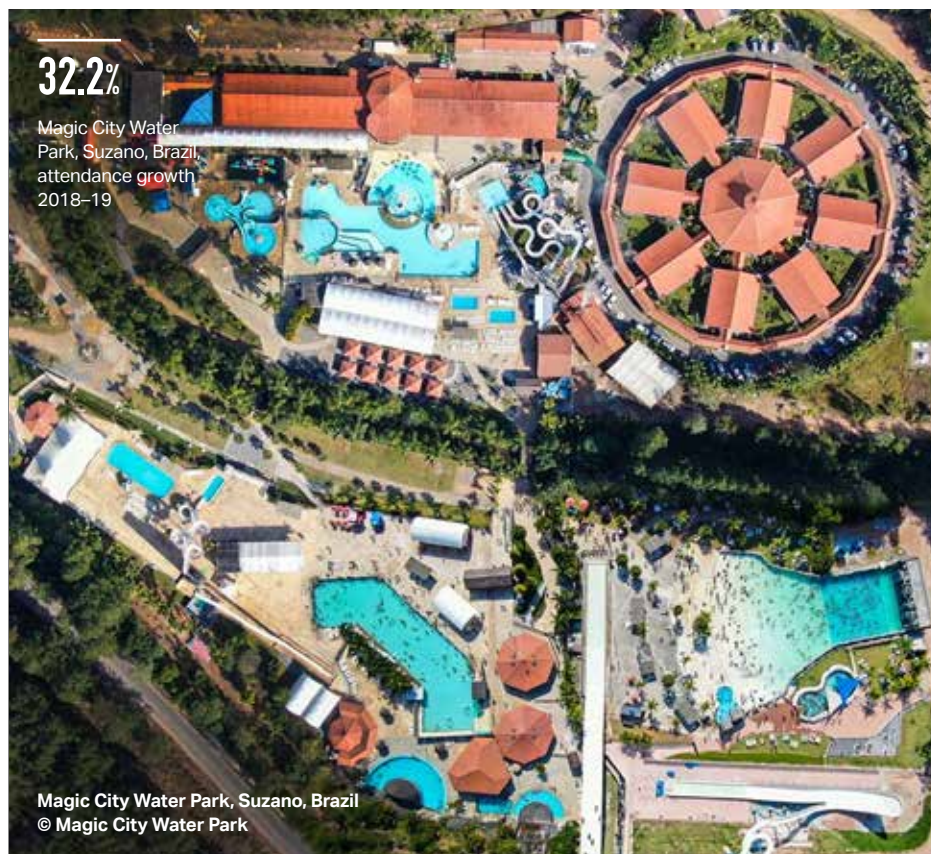
Mundo Petapa, Guatemala City, Guatemala
© Mundo Petapa

LATIN AMERICA WATER PARKS: MILESTONES AND SHIFTING IN THE RANKS

Year 2019 saw the top 10 water parks in Latin America and Mexico pass the 10 million mark in attendance for the first time — 10.2 million visits representing a 1.9% year-over-year increase. Much of it was driven by three parks, each achieving more than 30.0% growth over 2018 attendance.

New to our list, Magic City Water Park in Suzano, Brazil reported strong growth due to new attractions and marketing efforts. Situated in the São Paulo regional market, Magic City offers guests a variety of slides and pools, including hot springs, in an integrated resort setting.

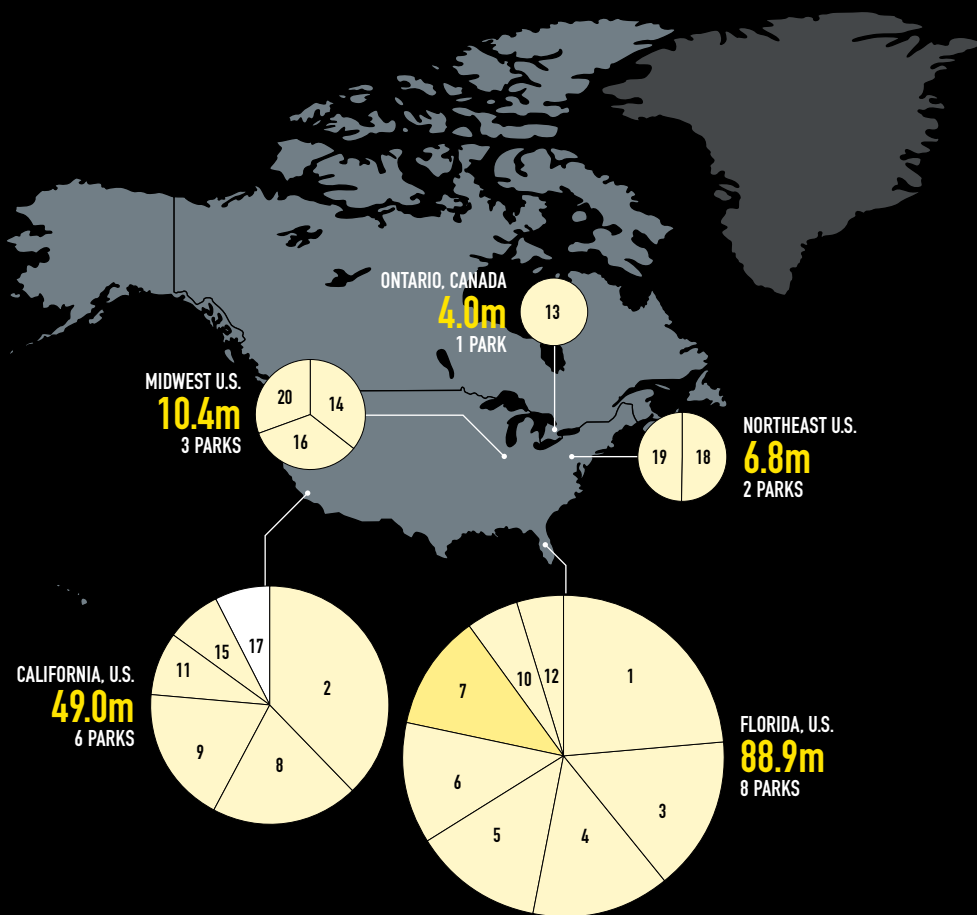
Thermas Water Park in São Pedro, Brazil added 160,000 visits in 2019 and attributed the growth to investments on multiple fronts including the addition of a large, new playground area; marketing, infrastructure, new food and beverage options, and new ticket windows, resulting in a significantly improved guest experience.



Hot Beach, in Olimpia, Brazil, moved up one place on the top 10 chart, from #10 in 2018 to #9 in 2019, reflecting a 31.6% attendance jump with almost 150,00 additional visits. Hot Beach benefited from more domestic visitation, aided by an increase of hotel rooms in the city, and economic conditions in Brazil bringing more international tourism. Following the trend of increasing visitation in shoulder seasons and with events, the park added Halloween, Christmas, Easter and spring break to its 2019 operating calendar.

On the down side, Piscilago, in Bogota, Colombia suffered a substantial decrease of 11.5% in attendance for 2019, likely due to economic factors. The economy was also cited by Thermas dos Laranjais in Olimpia, Brazil, which saw a 6.4% attendance decrease in 2019 despite adding a new slide complex — but kept its #1 position on the chart.

TOP 20 AMUSEMENT/THEME PARKS NORTH AMERICA

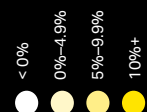


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	MAGIC KINGDOM THEME PARK AT WALT DISNEY WORLD RESORT, LAKE BUENA VISTA, FL, U.S.	0.5%	20,963,000	20,859,000
2	DISNEYLAND PARK, ANAHEIM, CA, U.S.	0.0%	18,666,000	18,666,000
3	DISNEY'S ANIMAL KINGDOM AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	1.0%	13,888,000	13,750,000
4	EPCOT AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	0.0%	12,444,000	12,444,000
5	DISNEY'S HOLLYWOOD STUDIOS AT WALT DISNEY WORLD, LAKE BUENA VISTA, FL, U.S.	2.0%	11,483,000	11,258,000
6	UNIVERSAL STUDIOS FLORIDA AT UNIVERSAL ORLANDO, FL, U.S.	2.0%	10,922,000	10,708,000
7	UNIVERSAL'S ISLANDS OF ADVENTURE AT UNIVERSAL ORLANDO, FL, U.S.	6.0%	10,375,000	9,788,000
8	DISNEY CALIFORNIA ADVENTURE PARK, ANAHEIM, CA, U.S.	0.0%	9,861,000	9,861,000
9	UNIVERSAL STUDIOS HOLLYWOOD, UNIVERSAL CITY, CA, U.S.	0.0%	9,147,000	9,147,000
10	SEAWORLD ORLANDO, ORLANDO, FL U.S.	1.0%	4,640,000	4,594,000
11	KNOTT'S BERRY FARM, BUENA PARK, CA U.S.	3.0%	4,238,000	4,115,000
12	BUSCH GARDENS TAMPA BAY, TAMPA, FL U.S.	1.0%	4,180,000	4,139,000
13	CANADA'S WONDERLAND, MAPLE, ONTARIO, CANADA	4.0%	3,950,000	3,798,000
14	CEDAR POINT, SANDUSKY, OH, U.S.	1.5%	3,731,000	3,676,000
15	SIX FLAGS MAGIC MOUNTAIN, VALENCIA, CA, U.S.	0.5%	3,610,000	3,592,000
16	KINGS ISLAND, KINGS ISLAND, OH, U.S.	1.0%	3,521,000	3,486,000
17	SEAWORLD SAN DIEGO, SAN DIEGO, CA, U.S.	-8.1%	3,485,000	3,793,000*
18	SIX FLAGS GREAT ADVENTURE, JACKSON, NJ, U.S.	1.5%	3,451,000	3,400,000
19	HERSHEYPARK, HERSHEY, PA, U.S.	0.5%	3,384,000	3,367,000
20	SIX FLAGS GREAT AMERICA, GURNEE, IL, U.S.	2.0%	3,169,000	3,107,000
TOP 20 TOTAL ATTENDANCE 2019			159,108,000	157,548,000
TOP 20 ATTENDANCE GROWTH 2018-19			1.0%	159,108,000 157,478,000

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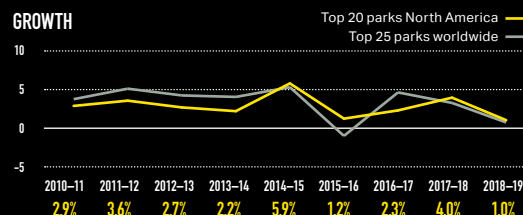
* Adjustment versus the figure we published in last year's report

KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked park indicated by number. Shading indicates attendance growth at the ranked park versus all other ranked parks.

GROWTH



1.0%

Top 20 amusement/theme parks North America attendance growth 2018-19

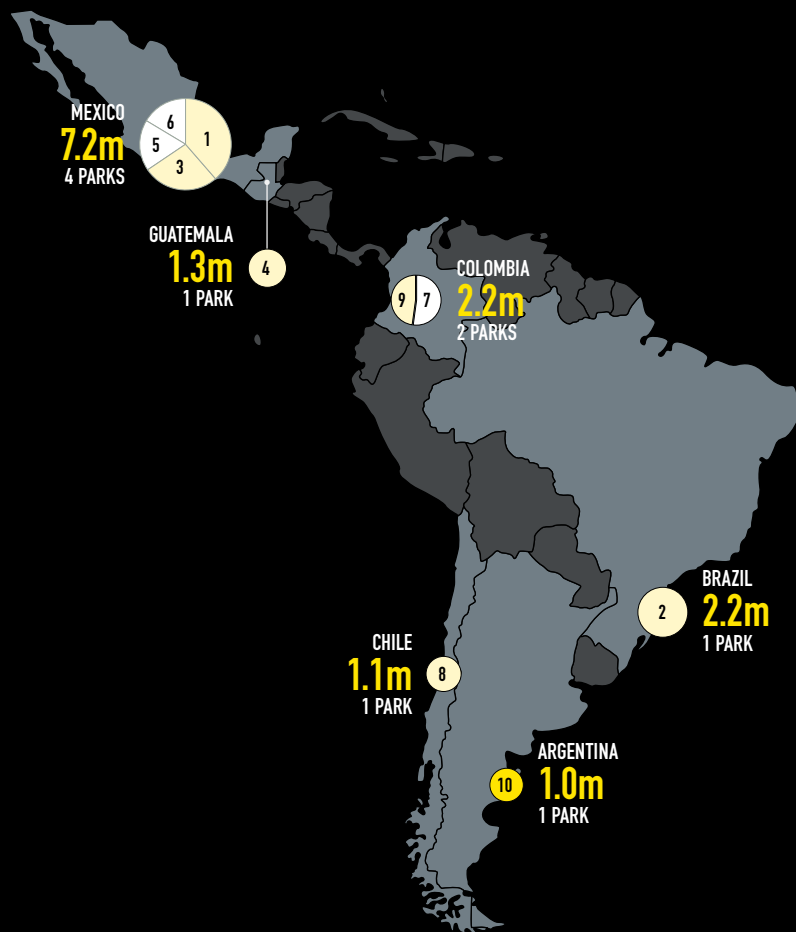
159.1m

Top 20 amusement/theme parks North America attendance 2019

157.5m

Top 20 amusement/theme parks North America attendance 2018

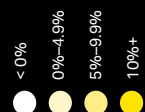
TOP 10 AMUSEMENT/THEME PARKS LATIN AMERICA



RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	SIX FLAGS MEXICO, MEXICO CITY, MEXICO	0.5%	2,803,000	2,789,000
2	BETO CARRERO WORLD, SANTA CATARINA, BRAZIL	1.9%	2,241,000	2,200,000
3	PARQUE XCARET, CANCUN, MEXICO	4.0%	1,960,000	1,885,000
4	MUNDO PETAPA, GUATEMALA CITY, GUATEMALA	8.5%	1,330,000	1,226,000
5	LA FERIA DE CHAPULTEPEC, MEXICO CITY, MEXICO	-18.0%	1,306,000	1,593,000
6	PLAZA DE SESAMO, MONTERREY, MEXICO	-1.0%	1,173,000	1,185,000
7	PARQUE MUNDO AVENTURA, BOGOTÁ, COLOMBIA	-0.6%	1,151,000	1,158,000
8	FANTASIALANDIA, SANTIAGO, CHILE	0.0%	1,100,000	1,100,000
9	THEME PARQUE NACIONAL DEL CAFÉ, QUINDIO, COLOMBIA	1.5%	1,043,000	1,028,000
10	PARQUE DE LA COSTA, BUENOS AIRES, ARGENTINA	10.5%	968,000	876,000
TOP 10 TOTAL ATTENDANCE 2019			15,075,000	15,040,000
TOP 10 ATTENDANCE GROWTH 2018-19			0.1%	15,075,000 15,064,000

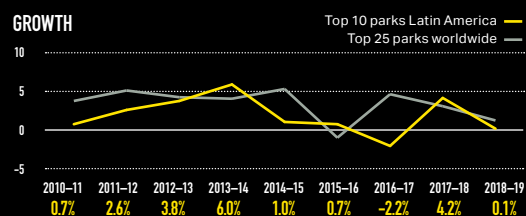
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KEY



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GROWTH



* Adjustment versus the figure we published in last year's report

0.1%

Top 10 amusement/theme parks Latin America attendance growth 2018-19

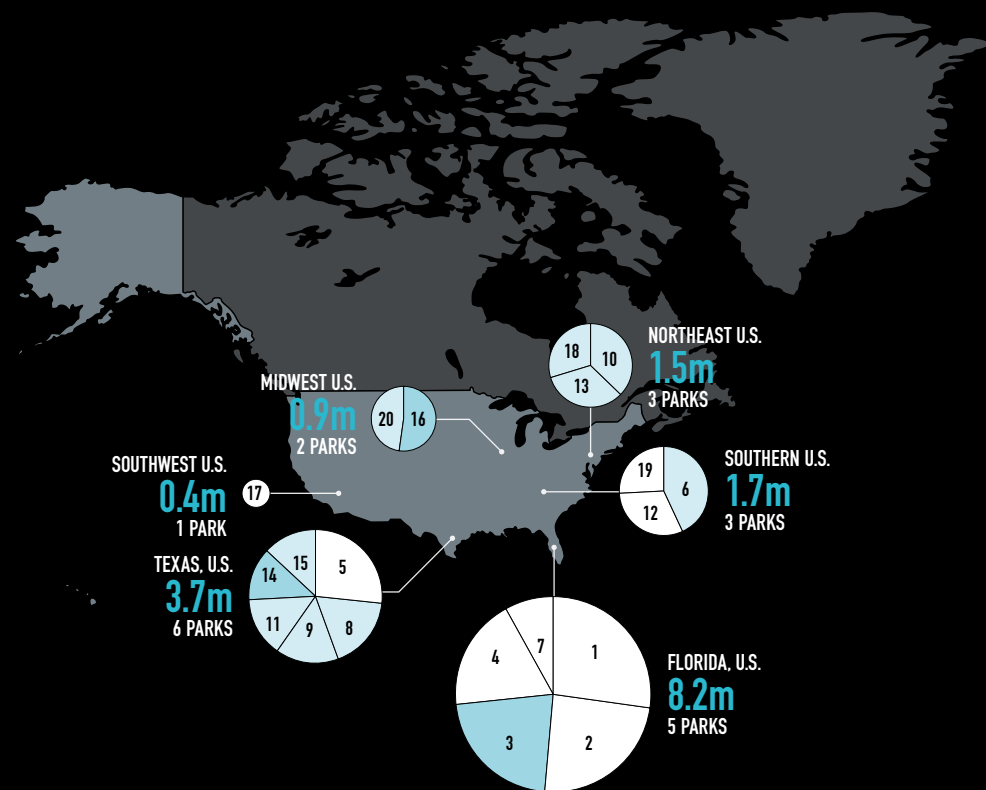
15.1m

Top 10 amusement/theme parks Latin America attendance 2019

15.0m

Top 10 amusement/theme parks Latin America attendance 2018

TOP 20 WATER PARKS NORTH AMERICA

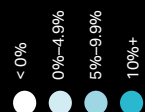


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	
1	TYPHOON LAGOON AT DISNEY WORLD, ORLANDO, FL, U.S.	-1.0%	2,248,000	2,271,000	
2	BLIZZARD BEACH AT DISNEY WORLD, ORLANDO, FL, U.S.	-1.0%	1,983,000	2,003,000	
3	UNIVERSAL'S VOLCANO BAY, ORLANDO, FL, U.S.	5.0%	1,811,000	1,725,000	
4	AQUATICA, ORLANDO, FL, U.S.	-1.5%	1,533,000	1,556,000	
5	SCHLITTERBAHN, NEW BRAUNFELS, TX, U.S.	-2.0%	996,000	1,016,000	
6	WATER COUNTRY USA, WILLIAMSBURG, VA, U.S.	1.0%	736,000	729,000	
7	ADVENTURE ISLAND, TAMPA, FL, U.S.	-1.9%	656,000	669,000	
8	AQUATICA SAN ANTONIO, SAN ANTONIO, TX, U.S.	0.9%	651,000	645,000	
9	SCHLITTERBAHN, GALVESTON, TX, U.S.	1.4%	567,000	559,000	
10	SPLISH SPLASH, CALVERTON NY, U.S.	0.6%	542,000	539,000	
11	SIX FLAGS-HURRICANE HARBOR, ARLINGTON, TX, U.S.	0.9%	538,000	533,000	
12	SIX FLAGS WHITE WATER ATLANTA, MARIETTA, GA, U.S.	-0.9%	526,000	531,000	
13	SIX FLAGS HURRICANE HARBOR, JACKSON, NJ, U.S.	1.5%	482,000	475,000	
14	TYPHOON TEXAS, KATY, TX, U.S.	6.0%	478,000	451,000	
15	SIX FLAGS HURRICANE HARBOR SPLASHTOWN, SPRING, TX, U.S.	0.0%	475,000	475,000*	
16	ZOOMBEZI BAY, POWELL, OH, U.S.	6.4%	466,000	438,000	
17	SIX FLAGS HURRICANE HARBOR PHOENIX, GLENDALE, AZ, U.S.	-2.0%	441,000	450,000*	
18	CAMELBEACH, TANNERSVILLE, PA, U.S.	0.5%	439,000	437,000	
19	DOLLYWOOD'S SPLASH COUNTRY, PIGEON FORGE, TN, U.S.	-0.9%	433,000	437,000	
20	CEDAR POINT SHORES, SANDUSKY, OH, U.S.	1.0%	424,000	420,000	
TOP 20 TOTAL ATTENDANCE 2019			16,425,000	16,359,000	
TOP 20 ATTENDANCE GROWTH 2018-19			1.2%	16,425,000	16,237,000

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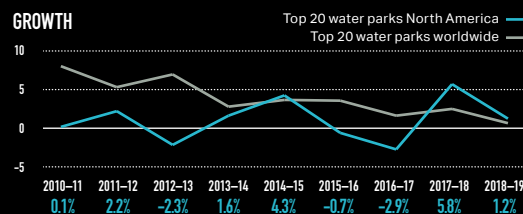
* Adjustment versus the figure we published in last year's report

KEY



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GROWTH



1.2%

Top 20 water parks North America attendance growth 2018-19

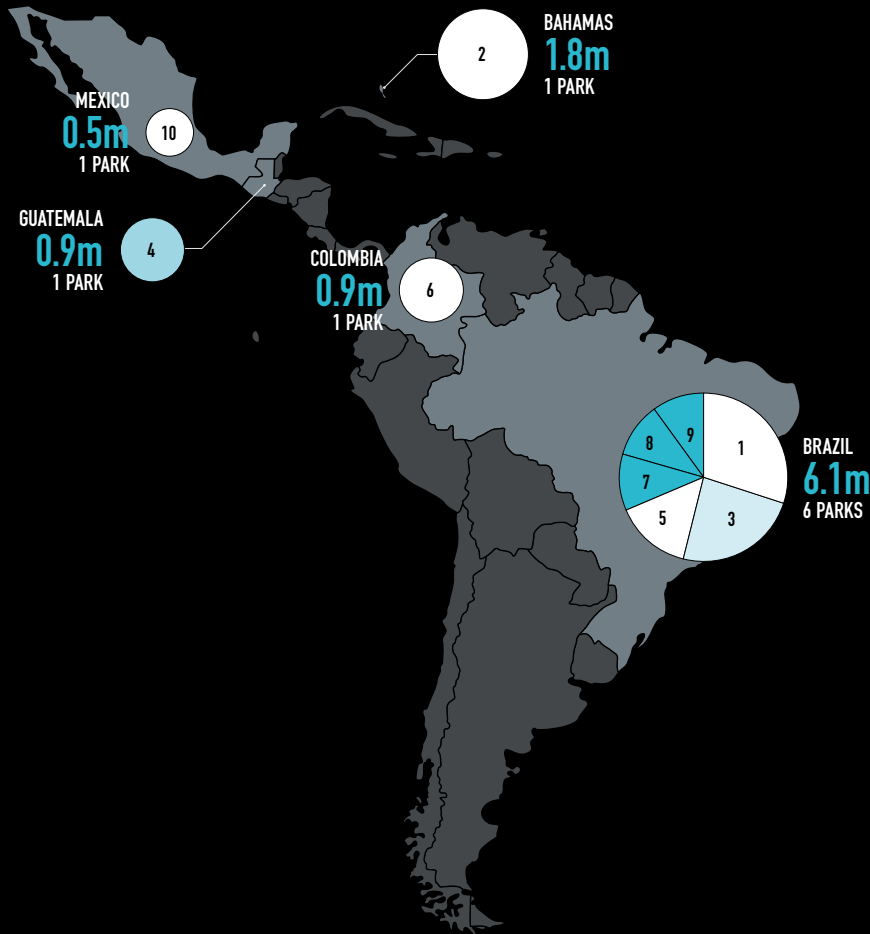
16.4m

Top 20 water parks North America attendance 2019

16.2m

Top 20 water parks North America attendance 2018

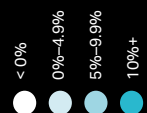
TOP 10 WATER PARKS LATIN AMERICA



RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	
1	THERMAS DOS LARANJAIS, OLIMPIA, BRAZIL	-6.4%	1,845,000	1,971,000	
2	BAHAMAS AQUAVENTURE WATER PARK, PARADISE ISLAND (NASSAU, NEW PROVIDENCE), BAHAMAS	-1.0%	1,813,000	1,831,000	
3	HOT PARK RIO QUENTE, CALDAS NOVAS, BRAZIL	2.1%	1,469,000	1,439,000*	
4	PARQUE ACUATICO XOCOMIL, SAN MARTÍN ZAPOTITLÁN, RETALHULEU, GUATEMALA	6.4%	894,000	840,000	
5	BEACH PARK, AQUIRAZ, BRAZIL	-6.3%	890,000	950,000	
6	PISCILAGO, GIRARDOT (BOGOTA), COLOMBIA	-11.5%	876,000	990,000	
7	MAGIC CITY WATER PARK, SUZANO, BRAZIL	32.2%	681,000	515,000	
8	THERMAS WATER PARK, SÃO PEDRO, BRAZIL	33.3%	641,000	481,000	
9	HOT BEACH, OLYMPIA, BRAZIL	31.6%	608,000	462,000	
10	PARQUE ACUATICO EL ROLLO, MORELOS, MEXICO	-0.9%	525,000	530,000	
TOP 10 TOTAL ATTENDANCE 2019			10,242,000	10,009,000	
TOP 10 ATTENDANCE GROWTH 2018-19			2.5%	10,242,000	9,988,000

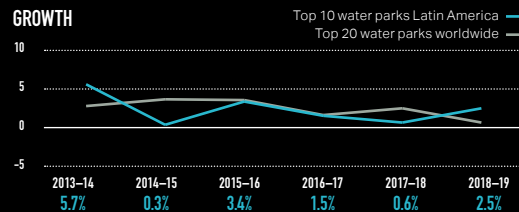
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KEY



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GROWTH



2.5%

Top 10 water parks Latin America attendance growth 2018-19

10.2m

Top 10 water parks Latin America attendance 2019

10.0m

Top 10 water parks Latin America attendance 2018

ASIA-PACIFIC

1.6%

Top 20 amusement/theme parks Asia-Pacific attendance growth 2018-19

141.3m

Top 20 amusement/theme parks Asia-Pacific attendance 2019

139.1m

Top 20 amusement/theme parks Asia-Pacific attendance 2018



CHRIS YOSHII
Vice President – Economics,
Asia-Pacific



BETH CHANG
Executive Director –
Economics, Asia-Pacific

6th

6th top theme park group worldwide, Chimelong Group, China



CHINA'S REGIONAL AND GLOBAL TRAJECTORY

The visitor attractions sector in the Asia Pacific region overall showed attendance growth of 1.6% for calendar year 2019. The most dramatic increases were in China. Theme parks, water parks and park operators in China showed strong attendance growth across the board, with some dramatic shifts in rank, globally and regionally.

Chimelong Safari Park, Guangzhou China
© Chimelong Group

1.6m

Changsha Fantawild
Oriental Heritage,
Changsha China,
attendance 2019



Zhengzhou Fantawild Adventure, Zhengzhou, China
© Fantawild

ASIA-PACIFIC THEME PARKS: BIG NUMBERS

China's growth in the leisure sector is a story of supply and demand: a large population with increasing income and desire for travel and leisure, across a large land mass with ever-better transportation infrastructure. These are ideal conditions for regional parks and attractions to develop and for regional chains to expand. Helping drive significant jumps in market share in 2019 were promotional programs that included special offers, school group admissions, and special celebrations marking the 70th anniversary of the founding of Communist China, an important national holiday.

In Zhuhai, Chimelong Ocean Kingdom ascended to the rank of top-attended theme park in China. Its 11.7 million visits in 2019 reflect an 8.4% increase from the prior year, coming in about 500,000 higher than Shanghai Disneyland, which saw a slight attendance drop as it focuses on implementing a yield strategy.

Chimelong turned the normally slow month of December into an attendance booster with a special promotion at Ocean Kingdom, allowing free admission to any child under 1.5 meters (five feet) in height (similar to free admission for kids under age 12 in the West). The park continues to expand, and in 2019 opened its new, 6,700-seat Chimelong Theater, a circus show venue. Its new Marine Science Park and hotel are nearing completion.

Looking at our chart of the Top 10 Theme Park Groups Worldwide, OCT Parks China and Fantawild Group both grew significantly in 2019. Fantawild, which opened four new parks in 2019, achieved an attendance increase of nearly 20% representing about 8 million additional visits. With 9.4% attendance growth, OCT, already the largest theme park operator in China, rose in the ranks above Universal Parks and Resorts to be the third-largest in the world.

Fantawild adds new parks every year and in 2019 its total grew to 29. The four new parks, all with Chinese cultural or historical themes, are Jingzhou Fantawild Oriental Heritage; Fantawild Oriental Legend in Handan; Jiayugan Fantawild Silk Road Dreamland, in Gansu province; and Changsha Fantawild Oriental heritage in Hunan province. New Fantawild projects in development include Ningbo Traditional Chinese Culture Park in Hangzhou Bay; Boonie Bears Town in Linhai, Shenzhen; and Xuzhou Fantawild Park in Jiangsu province.



**CHINA'S GROWTH IN THE LEISURE
SECTOR IS A STORY OF SUPPLY AND
DEMAND: A LARGE POPULATION WITH
INCREASING INCOME AND DESIRE
FOR TRAVEL AND LEISURE.**

11.2m

Shanghai Disneyland,
Shanghai, China,
attendance 2019



Shanghai Disneyland, Shanghai, China
© Disney

The state-owned OCT chain was one of many tourism and attraction operators in the country that built promotions around the 70th anniversary of Communist China, resulting in attendance jumps. OCT's group attendance totals also expanded with the addition of numerous small attractions, including unique farm attractions with lower admission fees that drew families with small children. It should be noted that group operator totals include visits to any gated commercial attraction, excluding temporary events and scenic spots.

Japan and Korea

In Japan, theme park attendance numbers were relatively flat in 2019, with visitation tapering off as the year progressed, although its two top-attended parks, Tokyo Disneyland and Tokyo DisneySea, part of Tokyo Disney Resort, still head the attendance list. Universal Studios Japan experienced a slight increase for the year.

New at Tokyo Disney Resort: In July 2019 Tokyo DisneySea opened the flying attraction Soaring: Fantastic Flight and the Song of Mirage show. DisneySea is undergoing expansion and in May 2019 broke ground on its eighth themed port, Fantasy Springs, a realm based on Disney films that will include a new hotel. Expansion has also been underway at Tokyo Disneyland with a new Beauty and the Beast attraction within a large-scale, entertainment and retail development.



Universal Studios Japan rolled out Universal Cool Japan 2019, a series of rides, attractions and events immersing guests in anime and pop culture brands such as Detective Conan, Lupin the Third, Sailor Moon, Neon Genesis Evangelion, Godzilla and Attack on Titan!

Lotte World amusement park is part of an extensive urban complex in Seoul that added the 1,821-foot-high Lotte World Tower in 2017, featuring the observation attraction Seoul Sky. Meanwhile, in Busan, Lotte World is developing a new family resort, Lotte's Magic Forest.

In Korea, overall park attendance was up and numbers were stable for 2019, showing recovery after a two-year slump caused primarily by a drop in tourism from Mainland China. In Seoul, Everland park posted some good results though still lower than its previous peak, and Lotte World remained flat.

Everland helped keep guests engaged in all weathers with New Year's celebrations, followed by its Winter Festival and Snow Safari. Everland Resort also includes the water park Caribbean Bay, two museums and hospitality.



Shift in travel patterns and looking down the COVID road

Chinese tourists have been staying closer to home, which is good for domestic markets but has meant lost revenue to other countries. The effects of COVID-19 were felt in China before the rest of the world, and subsequently the first stages of recovery have been appearing there as well. At this writing in midyear 2020, numerous parks had already re-opened with restrictions and attendance caps, and domestic travel by air and train were showing promising signs of recovery. Operators are working to salvage what they can of the summer season, with an emphasis on local markets.

Nonetheless 2020 is expected to show a record reduction in park attendance in Asia. Looking beyond 2020, there is room for optimism and expectation that 2021 and subsequent years will bring significant recovery in terms of attendance numbers, as parks experiment with business and operations models.

The development pipeline remains strong. In 2019, a dozen or more new parks opened in China. There are big attraction projects now in development or construction, including a major aquarium project by Chimelong. Some projects will likely experience delays of a few months and up to a year. However, we see long-term, sustained growth in the attractions industry. There is continued interest on the part of government to support tourism and cultural projects that support and spur domestic consumption.

Hong Kong

Hong Kong experienced disruptions to tourism and discretionary spending due to six months of social movement protests in 2019. Hong Kong Disneyland, although it started the year with robust attendance growth, ended the calendar year with total visits down 15.0%.

Ocean Park Hong Kong reported fiscal year attendance (ending June 2019) was flat; its reporting period did not reflect much impact from the social movement protests.

In 2019, Ocean Park offered a Summer Adventure Camp for children, opened the new Wild Twister thrill ride and introduced an innovative, VR free fall ride, The Abyss — VR Space Voyage.

Accolades in 2019 included Ocean Park being named “Most Popular Theme Park” at the 5th Ferris Awards of the China Association of Amusement Parks and Attractions (CAAPA), which also named Timothy Ng, executive director, operations and entertainment as “China Amusement Industry Pioneer.”

Hong Kong Disneyland is undergoing a multi-year transformation and expansion that will include a new, immersive area themed on “Frozen” and a re-imagining of the castle.



ASIA-PACIFIC WATER PARKS: UPS AND DOWNS

Overall, water park attendance in Asia was relatively flat for 2019, with half a percent growth. Among the individual parks, attendance performance was all along the spectrum from flat to double-digit increases.

The water park industry remains very vibrant in Asia with many new properties of all sizes and locations opening in many different countries. Water parks are attractive to developers as they generally represent a lower investment and are quicker to design and build compared to larger theme parks.

There is a great deal of innovation in water parks in Asia with more indoor parks in cooler climates, larger water parks integrating "dry" amusement elements, water parks as anchors to new township projects and resort style, tropical water parks.

China

Chimelong Water Park in Guangzhou, China readily maintained its #1 position on our table of the Top 20 Water Parks in Asia-Pacific, with a healthy 10.0% attendance increase in 2019. The park is part of the extensive Guangzhou Chimelong resort that also includes a theme park, safari park and circus stadium. In 2018 Chimelong Water Park was the first to install the unique SlideWheel, which doubles as water ride and centerpiece spectacle, and received a TEA Thea Award.



Aquaventure Atlantis in Sanya, China dramatically emerged onto the scene in 2019. It is part of Atlantis Sanya, a high-end resort honored with multiple awards from travel groups. Located in a popular, coastal area, the resort includes a 55-story hotel, water park and aquarium. In 2019, the resort started selling water park tickets independent of hotel stays, making it eligible for inclusion in our study.

The water park features extensive themed environments and landscaping, marquee water slides through aquarium tanks and action rivers. Its temperate location enables it to do well year-round and achieve the 1.2 million attendance that landed it in the #5 position on our Top 20 chart.

In Wuhan, Playa Maya Water Park enjoyed a 12.0% attendance increase. The park is located near Wuhan Happy Valley, a tourist destination with a cluster of theme parks. Playa Maya Water Park in Tianjin likewise showed a 4.2% attendance increase. Both water parks benefited from the overall OCT Group summertime festival promotions.

“
**THE WATER PARK INDUSTRY
REMAINS VERY VIBRANT
IN ASIA WITH MANY NEW
PROPERTIES OF ALL SIZES
AND LOCATIONS OPENING IN
MANY DIFFERENT COUNTRIES.**



11.1%

Caribbean Bay,
Seoul, South Korea,
attendance growth
2018-19

Caribbean Bay, Seoul, South Korea
© Caribbean Bay

Korea and Southeast Asia

In South Korea, the water park markets showed mixed results for 2019, with some parks showing strong increases while others declined. Caribbean Bay in Seoul, part of the Samsung Everland resort complex, experienced an 11.1% increase in attendance. Caribbean Bay boasts what are said to be the world's longest current pool and largest combined water slide. Everland in general saw increased attendance to the resort based on strong marketing and promotions. Woongjin Playdoci Waterdoci, in Bucheon, showed solid attendance growth of 4.2%.

Ocean World, in Hongcheon, had an attendance decline of 15.3% in 2019. It is the largest water park (in terms of area) in the country and part of the Vivaldi Park resort which also includes a ski resort and other leisure options.

Looking at Southeast Asia: Two Sunway parks in Malaysia are among the Top 20 Water Parks in Asia-Pacific. Sunway Lagoon, in Kuala Lumpur, experienced a 7.7% attendance decrease which dropped it one place to the #5 spot. In addition to water attractions, Sunway Lagoon incorporates dry amusement rides, wildlife exhibits, live shows and scary walk-through zones. In Perak, Sunway's Lost World of Tambun moved up from the #10 spot to #9 on our Top 20 chart, with 1 million attendance for 2019. Lost World of Tambun represents a sizable resort and entertainment complex that has grown significantly over the years.



1.2%

Sunway Lagoon,
Kuala Lumpur,
Malaysia,
attendance 2019

Sunway Lagoon, Kuala Lumpur, Malaysia
© Sunway Lagoon

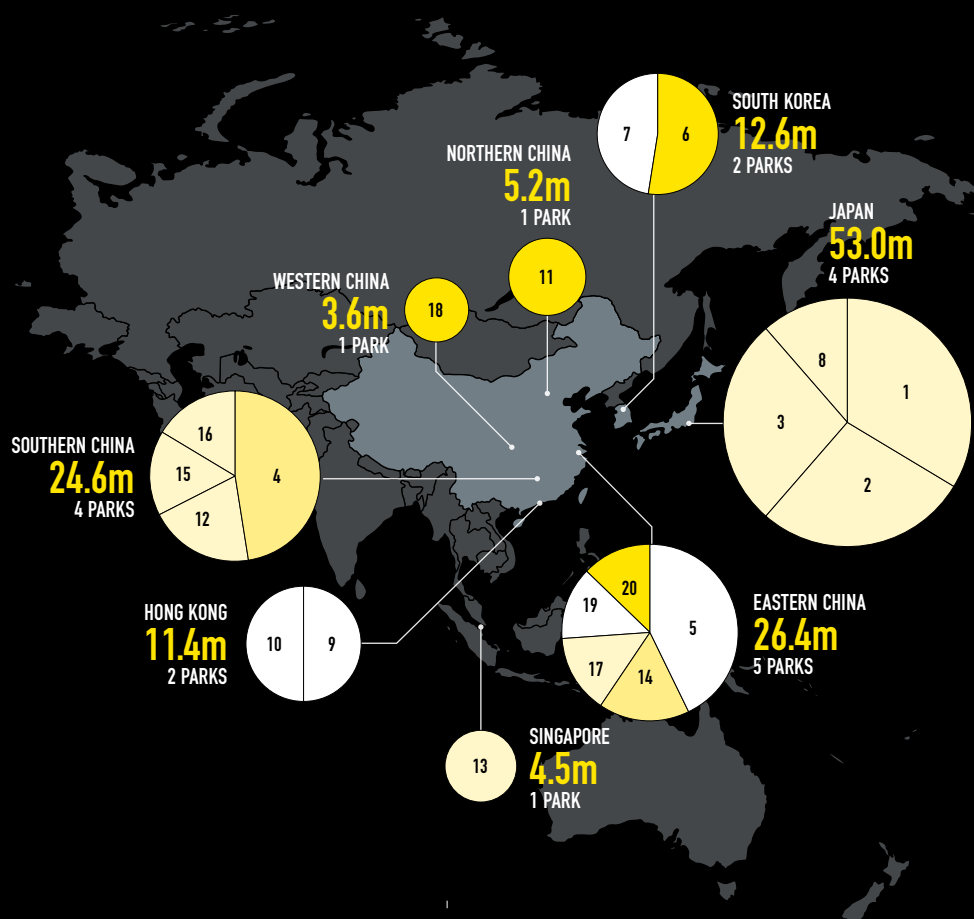
Hopes for a sustainable season

At this writing, the water parks in Asia are beginning to open up for guests in 2020, albeit with capacity and other restrictions imposed due to the pandemic. Water park visitation for 2020 is not expected to be as strong as 2019 but operators are hopeful about capturing sustainable levels of visits and revenue for the season.

“

WATER PARK VISITATION FOR 2020 IS NOT EXPECTED TO BE AS STRONG AS 2019 BUT OPERATORS ARE HOPEFUL ABOUT CAPTURING SUSTAINABLE LEVELS OF VISITS AND REVENUE FOR THE SEASON.

TOP 20 AMUSEMENT/THEME PARKS ASIA-PACIFIC

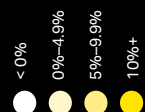


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	TOKYO DISNEYLAND, TOKYO, JAPAN	0.0%	17,910,000	17,907,000
2	TOKYO DISNEYSEA, TOKYO, JAPAN	0.0%	14,650,000	14,651,000
3	UNIVERSAL STUDIOS JAPAN, OSAKA, JAPAN	1.4%	14,500,000	14,300,000
4	CHIMELONG OCEAN KINGDOM, HENGQIN, CHINA	8.4%	11,736,000	10,830,000
5	SHANGHAI DISNEYLAND, SHANGHAI, CHINA	-5.0%	11,210,000	11,800,000
6	EVERLAND, SEOUL, SOUTH KOREA	12.9%	6,606,000	5,850,000
7	LOTTE WORLD, SEOUL, SOUTH KOREA	-0.1%	5,953,000	5,960,000
8	NAGASHIMA SPA LAND, KUWANA, JAPAN	0.5%	5,950,000	5,920,000
9	OCEAN PARK, HONG KONG SAR	-1.7%	5,700,000	5,800,000
10	HONG KONG DISNEYLAND, HONG KONG SAR	-15.0%	5,695,000	6,700,000
11	OCT HAPPY VALLEY, BEIJING, CHINA	29.6%	5,160,000	3,980,000
12	CHIMELONG PARADISE, GUANGZHOU, CHINA	4.8%	4,905,000	4,680,000
13	UNIVERSAL STUDIOS SINGAPORE, SINGAPORE	2.3%	4,500,000	4,400,000
14	CHINA DINOSAUR PARK, CHANGZHOU, CHINA	8.0%	4,434,000	4,106,000
15	OCT WINDOW OF THE WORLD, SHENZHEN, CHINA	0.0%	3,990,000	3,990,000
16	OCT HAPPY VALLEY, SHENZHEN, CHINA	1.8%	3,980,000	3,910,000
17	ZHENGZHOU FANTAWILD ADVENTURE, ZHENGZHOU, CHINA	1.1%	3,840,000	3,800,000
18	OCT HAPPY VALLEY, CHENGDU, CHINA	15.5%	3,580,000	3,100,000
19	NINGBO FANTAWILD ORIENTAL HERITAGE, NINGBO, CHINA	-4.4%	3,575,000	3,740,000
20	OCT HAPPY VALLEY, SHANGHAI, CHINA	21.1%	3,390,000	2,800,000
TOP 20 TOTAL ATTENDANCE 2019			141,264,000	138,224,000
TOP 20 ATTENDANCE GROWTH 2018-19			1.6%	141,264,000 139,104,000

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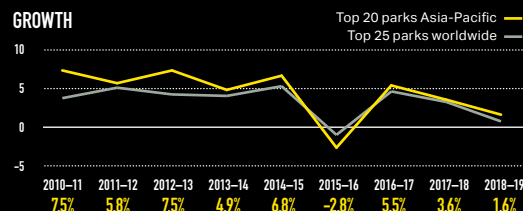
* Adjustment versus the figure we published in last year's report

KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked park indicated by number. Shading indicates attendance growth at the ranked park versus all other ranked parks.

GROWTH



1.6%

Top 20 amusement/theme parks attendance growth Asia-Pacific 2018-19

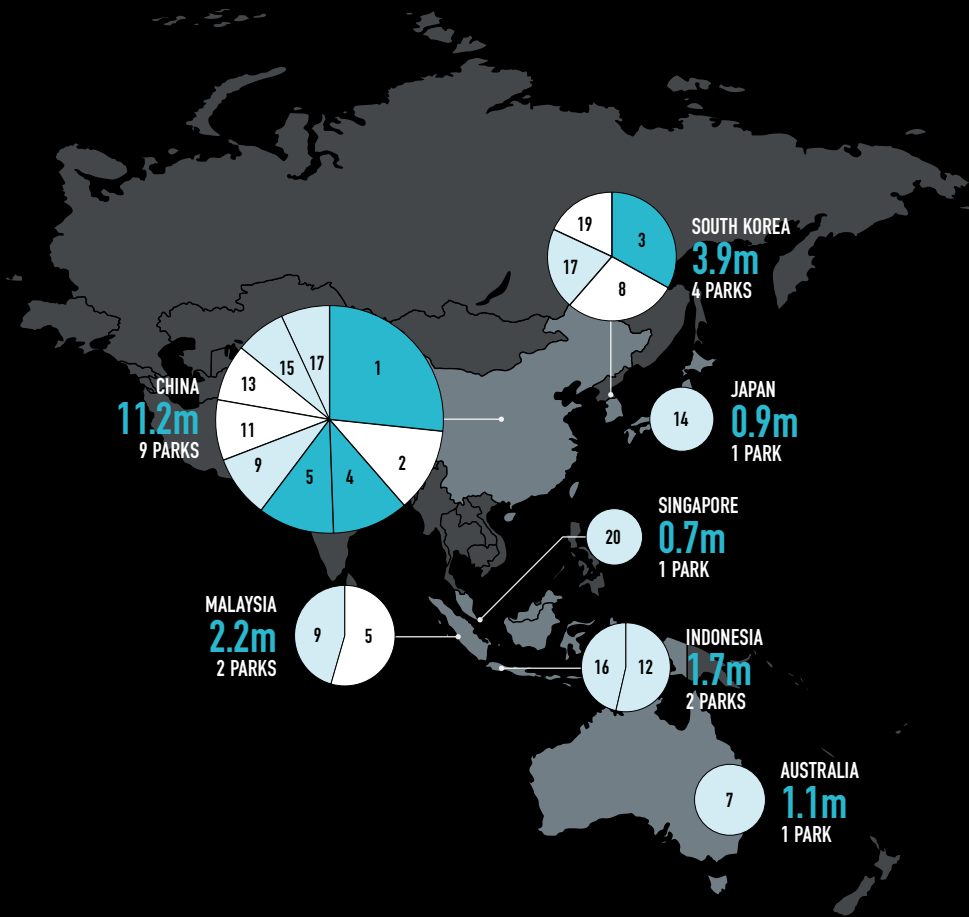
141.3m

Top 20 amusement/theme parks Asia-Pacific attendance 2019

139.1m

Top 20 amusement/theme parks Asia-Pacific attendance 2018

TOP 20 WATER PARKS ASIA-PACIFIC

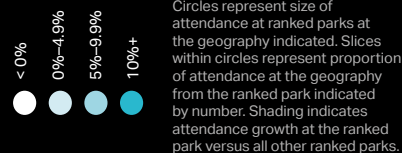


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	CHIMELONG WATER PARK, GUANGZHOU, CHINA	10.0%	3,014,000	2,740,000
2	WUHU FANTAWILD WATER PARK, WUHU, CHINA	-0.9%	1,348,000	1,360,000
3	CARIBBEAN BAY, SEOUL, SOUTH KOREA	11.1%	1,333,000	1,200,000
4	PLAYA MAYA WATER PARK, WUHAN, CHINA	12.0%	1,210,000	1,080,000
5	AQUAVENTURE ATLANTIS, SANYA, CHINA	100.0%	1,200,000	600,000
	SUNWAY LAGOON, KUALA LUMPUR, MALAYSIA	-7.7%	1,200,000	1,300,000
7	WET 'N' WILD GOLD COAST, GOLD COAST, AUSTRALIA	0.0%	1,120,000	1,120,000
8	OCEAN WORLD, HONGCHEON, SOUTH KOREA	-15.3%	1,071,000	1,264,000
9	KAIFENG YINJI WATER PARK, KAIFENG, CHINA	0.0%	1,000,000	1,000,000*
	SUNWAY LOST WORLD OF TAMBUN, PERAK, MALAYSIA	0.0%	1,000,000	1,000,000
11	PLAYA MAYA WATER PARK, SHANGHAI, CHINA	-2.0%	970,000	990,000
12	ATLANTIS WATER ADVENTURE, JAKARTA, INDONESIA	0.3%	910,000	907,000
13	ZHENGZHOU FANTAWILD WATER PARK, ZHENGZHOU, CHINA	-0.5%	905,000	910,000
14	SUMMERLAND, TOKYO, JAPAN	5.9%	868,000	820,000
15	XIAMEN FANTAWILD WATERPARK, XIAMEN, CHINA	0.6%	832,000	827,000
16	THE JUNGLE WATER ADVENTURE, BOGOR, WEST JAVA, INDONESIA	0.3%	785,000	783,000
17	PLAYA MAYA WATER PARK, TIANJIN, CHINA	4.2%	750,000	720,000
	WOONGJIN PLAYDOCI WATERDOCI, BUCHEON, SOUTH KOREA	4.2%	750,000	720,000
19	LOTTE WATER PARK, GIMHAE, SOUTH KOREA	-0.5%	740,000	744,000
20	ADVENTURE COVE WATER PARK, SINGAPORE	1.4%	710,000	700,000
TOP 20 TOTAL ATTENDANCE 2019			21,716,000	20,785,000
TOP 20 ATTENDANCE GROWTH 2018-19			0.5%	21,716,000

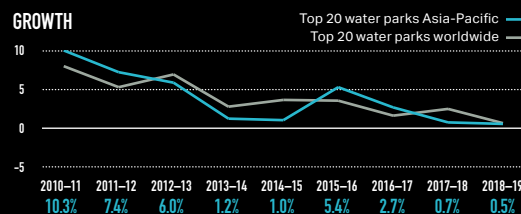
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* Adjustment versus the figure we published in last year's report

KEY



GROWTH



0.5%

Top 20 water parks Asia-Pacific
attendance growth 2018-19

21.7m

Top 20 water parks
Asia-Pacific attendance 2019

21.6m

Top 20 water parks
Asia-Pacific attendance 2018

EMEA

-1.3%

Top 20 amusement/
theme parks EMEA
attendance growth
2018–19

64.5m

Top 20 amusement/
theme parks EMEA
attendance 2019

65.4m

Top 20 amusement/
theme parks EMEA
attendance 2018



JODIE LOCK
Associate – Economics,
Asia-Pacific and EMEA

2.7%

Futuroscope,
Jaunay-Clan, France,
attendance growth
2018–19



EMEA THEME PARKS: STABILITY IN REVENUE AND ATTENDANCE FOR 2019

The region's 20 top-attended theme parks in 2019 demonstrated a stable picture across the EMEA region. Of these 20, the vast majority experienced increased attendance, and there were few shifts in position from the prior year.

For those parks exhibiting growth in visitation, this was primarily driven by operators reinvesting to give guests a reason to visit and return in the form of new rides and attractions, new hotels, and special events and celebrations, backed by strong marketing.

Futuroscope, Jaunay-Clan, France
© Futuroscope

Attendance to Disneyland Paris remained relatively stable in 2019 with the attraction holding its position as the top-attended theme park in the region. Europa-Park (Germany) and Efteling (The Netherlands) likewise held fairly steady; the former added its new Rulantica water park late in the season and will likely show the benefits of added attendance in future numbers.

It was a special year for Parc Astérix (France), which celebrated its 30th anniversary in 2019 and rose four places to the #10 spot on our Top 20 chart. The park's attendance increase of 7.0% was accompanied by a revenue increase of 13.0%. The park extended its operating season with its first Christmas festival and launched its new Gallic Parade, with special promotions through the year.

“

OPERATORS DROVE GROWTH BY REINVESTING IN AND MARKETING NEW RIDES AND ATTRACTIONS, HOSPITALITY AND SPECIAL EVENTS.



Other, new enhancements to the park included the 4D attraction "Attention Menhir!" and a magic show. In 2020, the park also added the new hotel Les Quais de Lutece.

Tivoli Gardens (Copenhagen) showed an attendance decrease of 5.5% for 2019; visitation to this outdoor-oriented property was likely impacted by Denmark's record rainfall that year, which shortened the operating season. Tivoli has been developing a strategy to continue adding more indoor elements in the future.

Liseberg (Sweden) saw a slight drop in attendance (3.4%) but reported increases in revenue and profitability. The park began charging admission for certain events in 2019 that had previously been free.

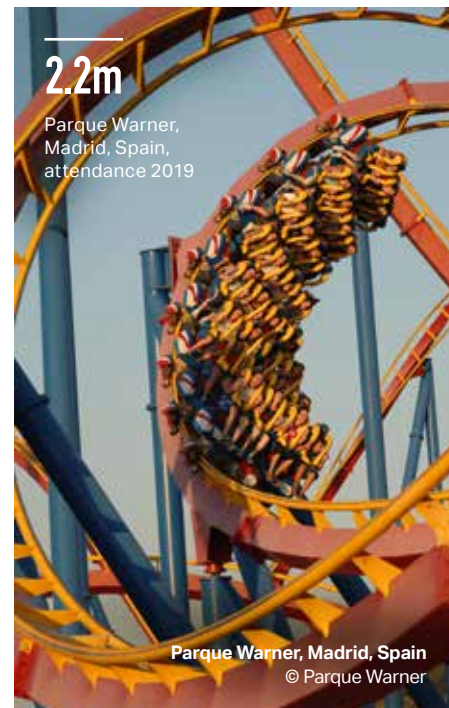
Attendance grew 3.7% at PortAventura (Spain) which drew 3,750,000 visits and was named Europe's Best Amusement Park by worldofparks.eu. In 2019, the park also added the Sesame Street: Street Mission interactive dark ride. PortAventura is one of a cluster of three successful, gated parks within PortAventura World resort, which also includes Ferrari Land and Caribe Aquatic Park. Multi-park and hotel bundling have helped ensure that visitation to all three parks has increased year over year.



2.7%

PortAventura, Salou,
Spain, attendance
growth 2018–19

PortAventura, Salou, Spain
© PortAventura



2.2m

Parque Warner,
Madrid, Spain,
attendance 2019

Parque Warner, Madrid, Spain
© Parque Warner



5.4%

Legoland Billund,
Denmark,
attendance
growth 2018–19

Legoland Billund, Billund, Denmark
© Merlin Entertainment Group



1.4%

Alton Towers,
Staffordshire, U.K.,
attendance growth
2018–19

Stargazing Pods, Alton Towers, Staffordshire, U.K.
© Merlin Entertainment Group

A sixth hotel, Colorado Creek, a four-star accommodation, was added in June 2019, bringing the total number of rooms to 2,200. PortAventura World also caters to business travelers and recently expanded its convention center. Its new hotel is carbon-neutral and one of several ways in which the resort has set an example of sustainability and environmental awareness.

European operator Merlin Entertainments kept its ranking as the second largest theme park group in the world. Merlin continues to build up its theme park resort destinations, many of which rank in the top 20 in Europe. Merlin properties Legoland Billund, Gardaland and Alton Towers each added a new hotel in 2019. Alton Towers also added stargazing pods.

The summer heatwave and transportation strikes in France did not impair visitation numbers at Futuroscope, with the park ending its season on a high with 1.9 million attendance. This is an increase of 50,000 visits. Factors included a huge uptick in family attendance, rising from 65.0% of visitation to 80.0% and attributed to the redesigned Futuropolis children's area. The summer holidays were a particularly popular time for the park, with attendance rising 10.0% during August alone.

EMEA WATER PARKS: STRONG GROWTH AT ESTABLISHED PARKS

Northern Europe and the UAE dominate the list of 10 top-attended water parks in EMEA for 2019 with few changes in rank from the previous year. Remaining on top, Therme Erding (Germany) had a strong summer and a dramatic attendance increase of 23.3%. Success is due to numerous new attractions, summer events and entertainment and a broad mix of attractions from thrill rides to saunas. Therme Erding's success has influenced other facilities in Northern Europe.

Aqualand Moravia (Czech Republic) also recorded double-digit attendance growth in 2019, attributed to a strong reinvestment and expansion program that includes hospitality, conference facilities, dining/retail and water attractions. This facility began as an indoor park and has added many new outdoor features making the most of panoramic views.

Wild Wadi (Dubai) saw an attendance increase of 2.8% but moved down one rank on the top 10 chart. Although tourism grew 5% in the UAE in 2019, the supply of parks still outpaces visitor demand.

Middle East and Africa

This section of the Theme Index covers Europe, the Middle East and Africa (EMEA); however, most of the properties that appear on these charts are in Europe. This is due to the study's focus on top-attended theme parks and water parks and the nature of tourism from one region to another.

On the continent of Africa, the larger cities such as Cape Town and Johannesburg are the likeliest locations for attractions that might one day appear on our charts.

As has happened in the Middle East, water parks might show up there first as they are popular in hot-weather regions and relatively less expensive to develop. But in this region, theme parks are not the leading drivers of tourism. Africa's unique tourism landscape is more oriented to nature and cultural experiences than the parks and attractions that are the focus of this study.

The Middle East has seen much attractions development and even mega-development, especially in Dubai and Abu Dhabi. (Saudi Arabia is an emerging player.) Some of the projects have been recognized with TEA Thea Awards, most recently Warner Bros. World Abu Dhabi.

However, these theme parks haven't attained the attendance figures that would earn them a place in our EMEA lists of top performers — at least, not yet — though some water parks have.

Looking ahead, Dubai Expo 2020 construction is well underway; the opening date for this six-month world's fair has been rescheduled to October 2021 due to COVID-19. SeaWorld Abu Dhabi is still on schedule for a 2022 opening on Yas Island. Parks already open on Yas Island include Warner Bros. World, Yas Waterworld and Ferrari World.

COVID-related shifts ahead

In light of decreased tourism, capacity caps and other restrictions related to COVID-19, parks will likely put new emphasis on revenue as a measure of success, but this will be complicated by economic recession. We can foresee changes in customer behavior, some of which may be long-term, and at least a year or two of reduction before the industry returns to 2019 numbers.

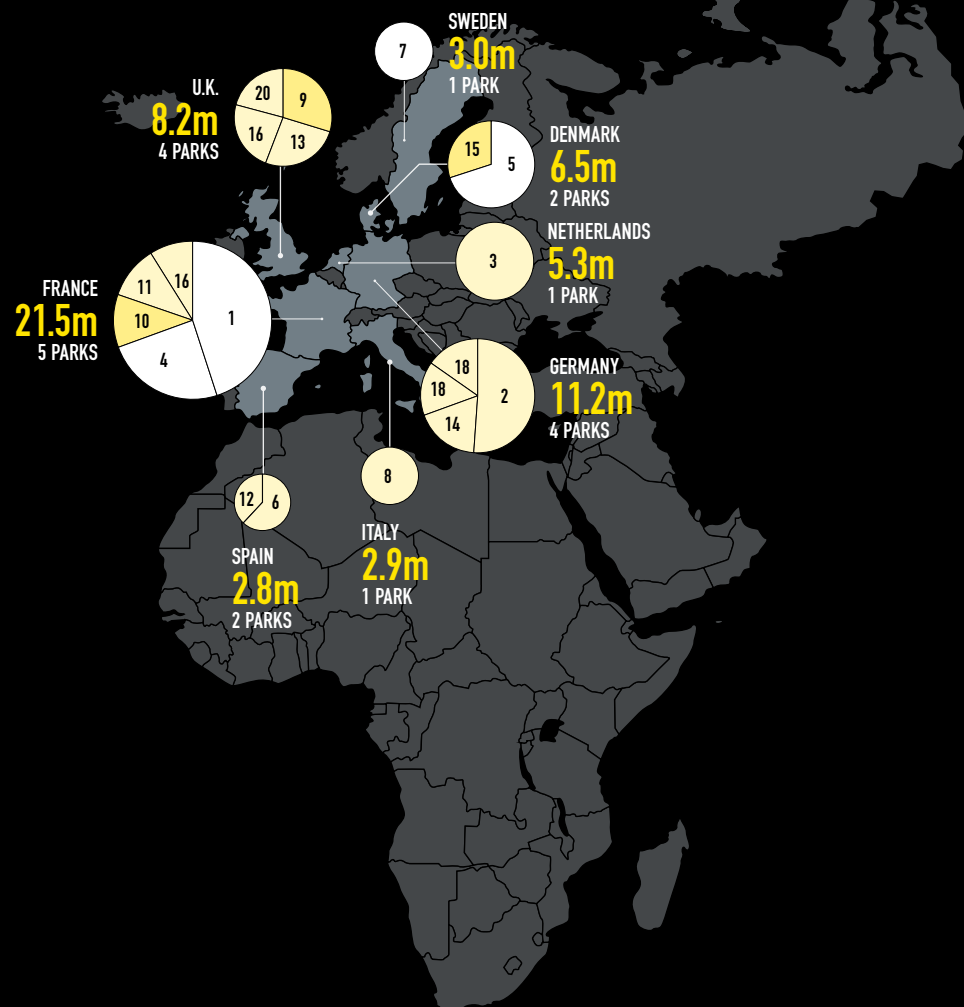
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**ON THE CONTINENT OF AFRICA,
THE LARGER CITIES SUCH AS CAPE
TOWN AND JOHANNESBURG ARE
THE LIKELIEST LOCATIONS FOR
ATTRactions THAT MIGHT ONE DAY
APPEAR ON OUR CHARTS.**



Warner Bros. World™ Abu Dhabi, Abu Dhabi, UAE
© Warner Bros. World™

TOP 20 AMUSEMENT/THEME PARKS EMEA

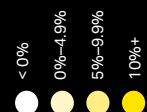


RANK	PARK LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	
1	DISNEYLAND PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-1.0%	9,745,000	9,843,000	
2	EUROPA-PARK, RUST, GERMANY	0.5%	5,750,000	5,720,000	
3	DE EFTELING, KAATSHEUVEL, NETHERLANDS	-1.7%	5,260,000	5,350,000*	
4	WALT DISNEY STUDIOS PARK AT DISNEYLAND PARIS, MARNE-LA-VALLEE, FRANCE	-1.0%	5,245,000	5,298,000	
5	TIVOLI GARDENS, COPENHAGEN, DENMARK	-5.5%	4,581,000	4,850,000	
6	PORTAVENTURA, SALOU, SPAIN	2.7%	3,750,000	3,650,000	
7	LISEBERG, GOTHENBURG, SWEDEN	-3.4%	2,950,000	3,055,000	
8	GARDALAND, CASTELNUOVO DEL GARDA, ITALY	0.7%	2,920,000	2,900,000	
9	LEGOLAND WINDSOR, WINDSOR, U.K.	5.0%	2,430,000	2,315,000	
10	PARC ASTERIX, PLAAILLY, FRANCE	7.0%	2,326,000	2,174,000	
11	PUY DU FOU, LES EPESSES, FRANCE	0.1%	2,308,000	2,305,000*	
12	PARQUE WARNER, MADRID, SPAIN	2.2%	2,232,000	2,185,000	
13	ALTON TOWERS, STAFFORDSHIRE, U.K.	1.4%	2,130,000	2,100,000	
14	PHANTASIALAND, BRÜHL, GERMANY	2.5%	2,050,000	2,000,000	
15	LEGOLAND BILLUND, BILLUND, DENMARK	5.4%	1,950,000	1,850,000*	
16	THORPE PARK, CHERTSEY, U.K.	1.1%	1,900,000	1,880,000	
	FUTUROSCOPE, JAUNAY-CLAN, FRANCE	2.7%	1,900,000	1,850,000	
18	LEGOLAND DEUTSCHLAND, GÜNZBURG, GERMANY	3.0%	1,700,000	1,650,000*	
	HEIDE PARK, SOLTAU, GERMANY	2.4%	1,700,000	1,660,000	
20	CHESSINGTON WORLD OF ADVENTURES, CHESSINGTON, U.K.	1.2%	1,690,000	1,670,000	
TOP 20 TOTAL ATTENDANCE 2019			64,517,000	64,305,000	
TOP 20 ATTENDANCE GROWTH 2018–19			-1.3%	64,517,000	65,371,000

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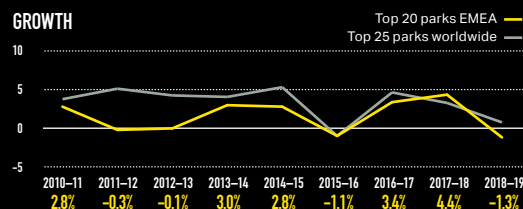
* Adjustment versus the figure we published in last year's report

KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked park indicated by number. Shading indicates attendance growth at the ranked park versus all other ranked parks.

GROWTH



-1.3%

Top 20 amusement/theme parks EMEA attendance growth 2018-19

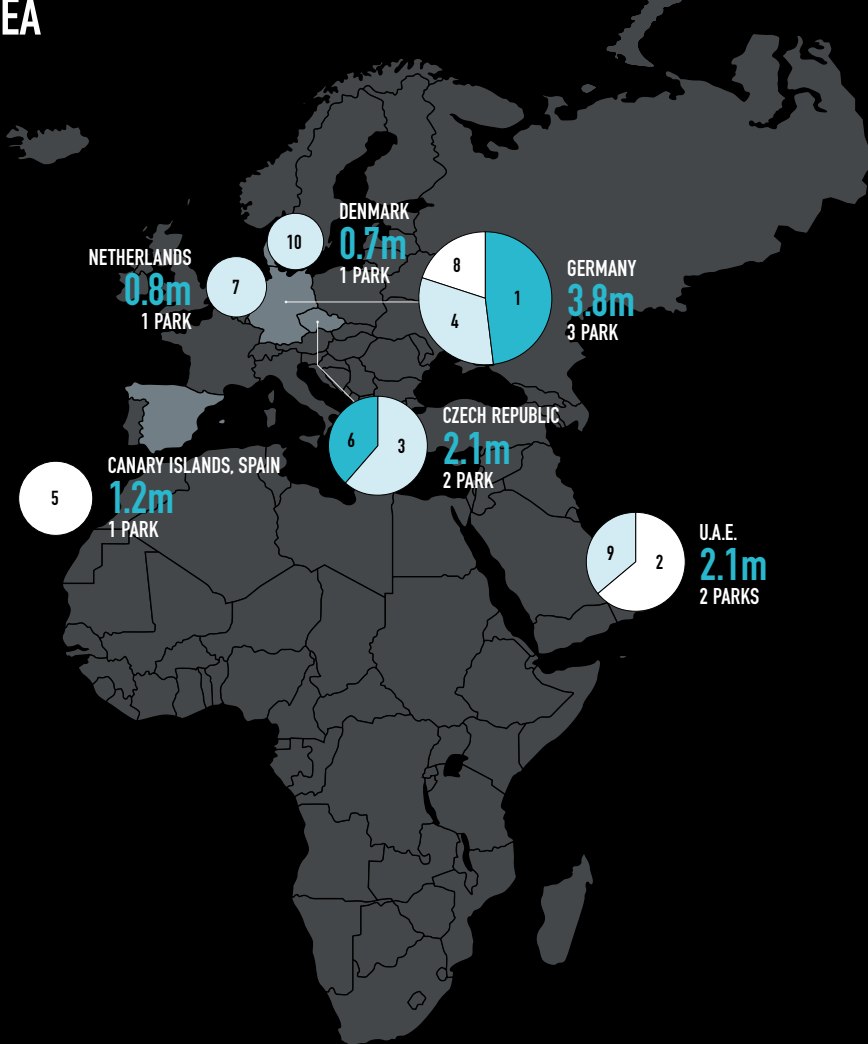
64.5m

Top 20 amusement/theme parks EMEA attendance 2019

65.4m

Top 20 amusement/theme parks EMEA attendance 2018

TOP 10 WATER PARKS EMEA



RANK	PARK	LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018
1	THERME ERDING	ERDING, GERMANY	23.3%	1,850,000	1,500,000
2	AQUAVENTURE WATER PARK	DUBAI, U.A.E.	-5.4%	1,322,000	1,397,000
3	AQUAPALACE	PRAGUE, CZECH REPUBLIC	0.9%	1,300,000	1,288,000
4	TROPICAL ISLANDS	KRAUSNICK, GERMANY	2.8%	1,233,000	1,200,000
5	SIAM PARK	SANTA CRUZ DE TENERIFE, SPAIN	-0.8%	1,200,000	1,210,000
6	AQUALAND MORAVIA	PASOHLÁVKY, CZECH REPUBLIC	11.9%	806,000	720,000
7	TIKI POOL	DUINRELL, THE NETHERLANDS	0.0%	800,000	800,000
8	NETTEBAD	OSNABRÜCK, GERMANY	-0.3%	756,000	758,000
9	WILD WADI	DUBAI, U.A.E.	2.8%	740,000	720,000
10	LALANDIA	BILLUND, DENMARK	0.0%	682,000	682,000
TOP 10 TOTAL ATTENDANCE 2019				10,689,000	10,275,000
TOP 10 ATTENDANCE GROWTH 2018-19			4.0%	10,689,000	10,275,000

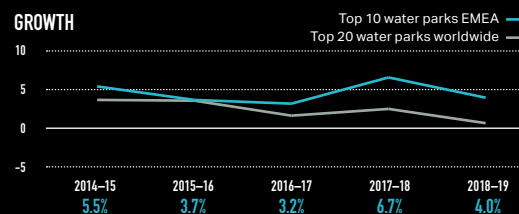
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* Adjustment versus the figure we published in last year's report

KEY

Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked park indicated by number. Shading indicates attendance growth at the ranked park versus all other ranked parks.

GROWTH



4.0%

Top 10 water parks EMEA attendance growth 2018-19

10.7m

Top 10 water parks EMEA attendance 2019

10.3m

Top 10 water parks EMEA attendance 2018

MUSEUMS

-2.4%

Top 20 museums
attendance growth
worldwide 2018–19

105.5m

Top 20 museums
worldwide
attendance 2019

108.1m

Top 20 museums
worldwide
attendance 2018



LINDA CHEU

Vice President – Economics,
Americas

With contributions from **Sarah Linford**, Senior Associate – Economics, Americas, **Beth Chang**, Executive Director – Economics, Asia-Pacific and **Jodie Lock**, Associate – Economics, Asia-Pacific and EMEA.

15.0%

Musée d'Orsay, Paris,
France, attendance
growth 2018–19



Musée d'Orsay, Paris, France
© Musée d'Orsay

WORLDWIDE

The 20 most-visited museums in the world performed well and remained relatively stable in 2019, globally attracting some 105 million visits overall compared to 108 million in 2018. Asia's top museums gained global market share and Europe's manifested significant attendance growth, while in North America, visits to the top museums declined due to a variety of factors.

There were two newcomers to the global top 20 in 2019 — Shanghai Science and Technology Museum in China and Musée d'Orsay in France. Special exhibitions continue to be primary drivers of attendance change in our lists and are an important way that the largest museums invest in the visitor experience to maintain market share and keep pace with population and tourism growth.

9.6m

Louvre, Paris,
France, attendance
2019



Louvre, Paris, France

The size and character of the industry will likely shift post-pandemic. Attendance declines for 2020 are inevitable, and recovery will take time. The museum industry is decentralized, with diversity in markets, business models, and financial fitness, which will translate to varied resiliency in regard to COVID challenges. However, the performance of museums in 2019 demonstrates continued public enthusiasm for what museums have to offer and will serve as a baseline for evaluating the impact of COVID-19 in next year's report.

MUSEUMS IN EMEA

The 20 top-attended museums in Europe enjoyed a very strong year overall in 2019, with 83.8 million visits reflecting an increase of 4.5%, or 3.5 million additional visits compared to the previous year. The vast majority of change in attendance was driven by special exhibitions, with several museums posting double-digit increases in 2019.

Attendance to museums in Paris has stabilized once again after the civil unrest a few years ago, which had led to significant declines in 2017. In 2019, international tourism kept numbers high at most Paris museums despite some disruptions caused by "Yellow Vest" protests and transit strikes. Museums in Paris accounted for 16.5 million, close to 20.0%, of all EMEA museum visits.

Foreign tourists comprise 75.0% of visitors to the Musée du Louvre, which maintained its first-place ranking in Europe and the world, with 9.6 million visits in 2019. While the number was down slightly from its all-time high of 10.2 million in 2018, this was largely due to a new visitor flow management program and online booking system that were strategically implemented to reduce overcrowding and improve the guest experience. The system reduced attendance by 20.0% during peak summer months, which had previously averaged 1 million visits per month.

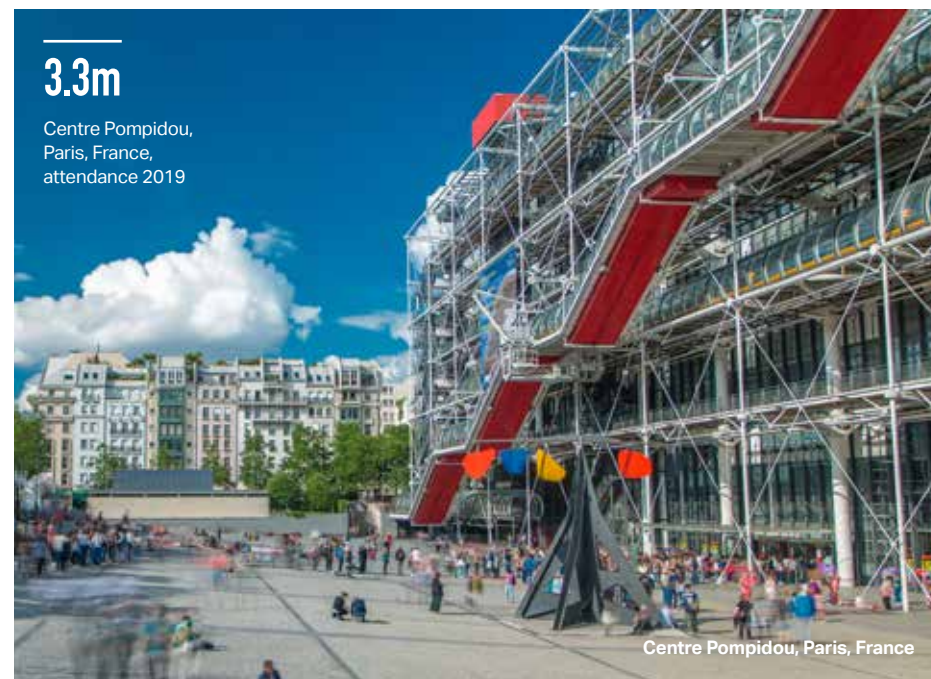
The Louvre celebrated the 30th anniversary of its I.M. Pei-designed glass Pyramid entryway with special events and Saturday night openings. The major exhibition, "Leonardo da Vinci" was a huge domestic and international hit with record attendance. The Louvre also grew its online presence significantly in 2019, upping its Instagram following by 47.0% to 3.5 million.

“

THE PERFORMANCE OF MUSEUMS IN 2019 DEMONSTRATES CONTINUED PUBLIC ENTHUSIASM FOR WHAT MUSEUMS HAVE TO OFFER AND WILL SERVE AS A BASELINE FOR EVALUATING THE IMPACT OF COVID-19 IN NEXT YEAR'S REPORT.

3.3m

Centre Pompidou,
Paris, France,
attendance 2019



Centre Pompidou, Paris, France

Growth on Weibo was up by 75.0% to 30 million followers, demonstrating the online popularity of the Louvre among the Chinese.

Also in Paris, Musée d'Orsay drew record attendance with nearly 3.7 million visits in 2019, up 15.0% with two popular, special exhibits, "Black Models: From Géricault to Matisse," (500,000+ visits) and "Berthe Morisot (413,000 visits). Cité des Sciences et de l'Industrie also saw record numbers with 2.4 million visits in 2019, up 6.2% attributed to a broad range of events and festivals, and despite La Géode, its giant screen theater dome, being closed for renovation. Centre Pompidou experienced a 7.9% drop in attendance due to construction that limited hours and access for part of the year.

Markets

Museums in Moscow and Amsterdam demonstrated the ability of blockbuster exhibitions to attract local residents. Moscow's State Tretyakov Gallery enjoyed a major attendance rebound of 32.0% — much of it from local markets — thanks to the Ilya Repin exhibition which drew more than 600,000 visits. Also popular were retrospectives of Arkhip Kuindzhi and Vasily Polenov, and the museum's update of its permanent exhibition galleries of 20th Century art.



Amsterdam's Rijksmuseum was another double-digit performer with 17.4% attendance growth in 2019 drawn by exhibitions and events marking the 350th anniversary of Rembrandt's death. 40.0% of the visitors to the Rijksmuseum are local and 60.0% are international.

Double-digit attendance increases were also seen at top art museums in Madrid in 2019. Museo Nacional del Prado experienced nearly 11.0% growth, attributable to free admission over a three-day period celebrating the 200th anniversary of its founding. The peak day during this period was Easter Saturday with 14,300 visits, versus a daily average of 8,800. Engagement on Instagram also increased, with a 65.0% bump in followers.

At Reina Sofía, where 2019 attendance increased nearly 14.0%, the free areas of the museum delivered the biggest boosts although special exhibitions ("The Poetics of Democracy: Images and Counter-Images from the Spanish Transition" and "Charles Ray: Four Patterns") also proved popular, and admissions revenues rose 3.0%.

Museums in London generally recorded steady growth in 2019. The strongest performer was the British Museum, with a nearly 7.0% increase in attendance driven by two major, special exhibitions. The Japanese Manga blockbuster generated 1,900 visits per day on average for a total of 184,000 over three months. “Rembrandt: Thinking of Paper” was also a key driver, accounting for nearly 327,000 visits over a six-month period.

Finally, highlighting the continued popularity of exhibits revolving around major international fashion houses, “Christian Dior: Designer of Dreams” was a record breaker for special exhibition attendance at the Victoria & Albert Museum in London, with 595,000 visits to Dior alone, beating out the V&A’s previous attendance record of some 480,000 visits for the 2015 exhibition Alexander McQueen: Savage Beauty.”

Africa and Middle East

Museums in Africa and the Middle East have not yet reached attendance levels that bring them onto our charts, but we do watch development in these areas. Since opening in November 2017, the Louvre Abu Dhabi has drawn an average of approximately 1 million per year. A noteworthy new development in Africa is the 150,000 square foot Museum of Black Civilizations which opened in November 2018 in Dakar, with major investment from China.



36.3%

Shanghai Science & Technology Museum, Shanghai, China, attendance growth 2018–19

Shanghai Science & Technology Museum, Shanghai, China

5.8%

British Museum, London, U.K., attendance growth 2018–2019



British Museum, London, U.K.

MUSEUMS IN ASIA

China continues to dominate the list of the most attended museums in Asia, as well as the Asia museums represented on our top 20 chart of the world’s most attended museums. Of the six museums in Asia that are on the top 20 chart, five are in China and one is in Taiwan. The Shanghai Science and Technology Museum joined the top 20 most attended global museums list, propelled by a 36% increase to 4.8 million visits. The National Museum of China in Beijing kept its global position, second only to the Louvre Paris, although attendance decreased by 14.2%.

Asia’s top museums saw increased global market share in 2019. Of the nearly 105.5 million visits to the world’s top 20 museums in 2019, Asia museums accounted for more than 25%, or 28.3 million visits. In 2018 that figure was 24.7 million out of 104.8 million. Visits to the top museums in Europe for the same period were roughly twice Asia’s, at 57.2 million.

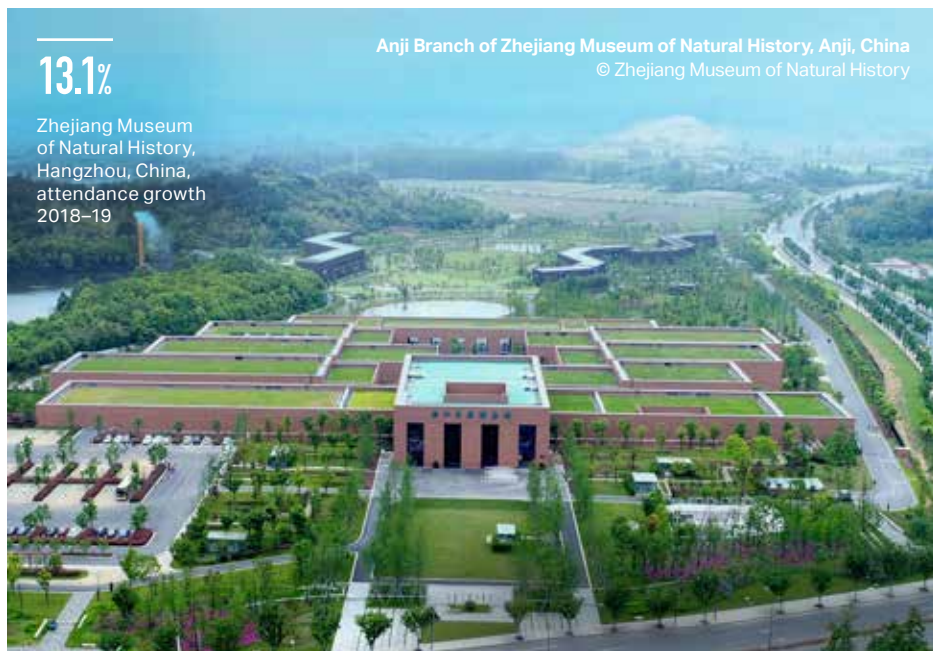
Chinese Museums: Attendance ebbs and flows

Among individual museums there was considerable fluctuation in Asia’s top 20, but the aggregate performance reflects overall stability, with attendance totaling nearly 67.5 million in 2019 compared to 67.7 million the previous year.

13.1%

Zhejiang Museum of Natural History, Hangzhou, China, attendance growth 2018–19

Anji Branch of Zhejiang Museum of Natural History, Anji, China
© Zhejiang Museum of Natural History



Looking at our 2019 list of Asia's top 20 museums, 12 of those 20 are museums in China, with several list newcomers including: Xian Museum, Tianjin Natural History Museum, Shanghai Natural History Museum, Zhejiang Natural History Museum, and Hubei Provincial Museum. The National Taiwan Science Education Center was also new to Asia's top 20 museums in 2019. These newcomers were propelled onto the chart with growth between 13.0% and 47.0%. Several museums, both in China and in other Asian countries, fell off the list as well, with the Asian top 20 having significantly more volatility compared to EMEA and North America. Given the large size of markets and sheer volume of museums in China, the impact of special exhibitions from year to year creates a high degree of fluctuation that will likely lead to more such rotation and volatility in the future.

Attendance increases in 2019 were driven by a number of special exhibitions and activities commemorating the 70th anniversary of the founding of Communist China. The National Museum of China in Beijing presented nine thematic exhibitions spanning art, culture, history and politics including "The Power of Truth: Marking the Bicentenary of the Birth of Karl Marx," "The Journey Back Home: An Exhibition of Chinese Artifacts Repatriated from Italy," and "The Splendor of Asia: An Exhibition of Asian Civilizations."

Museums in China also became contributors to the nighttime economy in 2019 per encouragement from the central government. Many extended operating hours to 9:00 pm with special events and activities. In future such events may develop into significant attendance and revenue generators for China's museums, as they have done in other geographies.

The use of timed ticketing systems led to some reductions in attendance. The systems, introduced by many museums with free attendance to regulate crowd flow, are an example of how operational measures affected numbers in 2019. Going forward, reservation systems will likely remain the rule as a safety measure due to the pandemic.



MUSEUMS IN CHINA ALSO BECAME CONTRIBUTORS TO THE "NIGHT-TIME ECONOMY" IN 2019 AS THE CHINESE CENTRAL GOVERNMENT INSTRUCTED MUSEUMS TO PARTICIPATE IN ENCOURAGING NIGHTTIME LEISURE ACTIVITIES.

Hong Kong Museum of Art, Hong Kong
© Hong Kong Museum of Art



MUSEUMS IN NORTH AMERICA

The 20 top-attended museums in North America saw an aggregate attendance decline of about 18.0% in 2019 compared to the previous year, with double-digit decreases at several facilities. History shows that these attendance swings at the top are primarily driven by the presence or absence of blockbuster exhibitions, and construction-related closures. In 2019 the factors also included changes to visitor counting methods.

The process of estimating attendance for museums, especially those with free admission, is an issue that has been identified in the Museum Index since we began to create this annual study in 2012.

There have been multiple examples in 2019 of attendance estimates being affected by operational issues as well as changes in visitor counting methods and systems.

Washington, DC

With the exception of the National Museum of African American History and Culture, where attendance grew 5.0%, in the United States capital all Smithsonian museums experienced decreases in reported attendance between 2018 and 2019.

Three of them — the National Museum of Natural History, National Air and Space Museum and National Museum of American History — transitioned from hand counters to an automated system to estimate annual attendance. In addition, the National Air and Space Museum commenced a major, multi-year renovation in late 2018.



Further complicating the figures, the Smithsonian American Art Museum and the National Portrait Gallery, which had previously been reported together as the Donald W. Reynolds Center for American Art and Portraiture, transitioned to reporting as two separate museums, and the Renwick Gallery, which was previously reported separately, is now included as part of the Smithsonian American Art Museum attendance number.

Aside from these reporting and operational changes, the Renwick's "No Spectators: The Art of Burning Man" exhibition and Obama portrait exhibition at the National Portrait Gallery drew record crowds and peak attendance numbers in 2018, followed by a decrease in 2019.

New York

With nearly 6.8 million visits in 2019, the Metropolitan Museum of Art is down 8.0%, but still retains its position as the most-visited museum in North America and third most-visited in the world. The attendance decrease at the Met is another "low-after-high" temporary exhibition story. The "Heavenly Bodies: Fashion and the Catholic Imagination" exhibition in 2018 had earned the highest attendance of any special exhibition in the museum's history with close to 1.7 million visits. At the Museum of Modern Art, the 28.0% attendance drop in 2019 is attributable to having been closed part of the year for expansion. We're keeping an eye on the new Statue of Liberty Museum, which opened May 2019 and may find its way into the Top 20 before long.

Midwest and West

In Chicago, the Museum of Science and Industry experienced a nearly 11.0% attendance decrease in 2019, after the special exhibition, “The Science Behind Pixar” in 2018. Similarly, the California Science Center in Los Angeles experienced an attendance decrease of 13.0% in 2019, the year after great success with “King Tut: Treasures of the Golden Pharaoh.”

TRENDS AND A VIEW TO 2020

The events of 2020 have brought multiple, pressing issues to the museum world, beginning with simple survival. At this writing in July 2020, many museum buildings are still closed, facing enormous economic and operational challenges. The UN cultural agency stated on International Museum Day (May 18, 2020) that nearly 90.0% of the world’s museums had closed their doors, and that close to 13.0% were in danger of never re-opening.

Economic viability and reopening

Major factors across geographies driving attendance, such as the blockbuster exhibition and social events, may not make economic sense nor be viable in the context of reopening guidelines.

While some museums will continue to re-open with new protocols in place, others will still need to work through the business, staffing, and operating measures to allow them to successfully do so. The extent to which individual museums are able to remain viable during and after the pandemic will depend on a number of factors, including revenue sources, size of endowment and/or operating reserves, building facility characteristics, outdoor programming opportunities, level of COVID in the community, government support, and building ownership, among others.



WHILE SOME MUSEUMS ARE BEGINNING TO RE-OPEN WITH NEW PROTOCOLS IN PLACE, OTHERS CONTINUE TO WORK THROUGH THE BUSINESS, STAFFING, AND OPERATING MEASURES THAT WILL ALLOW THEM TO SUCCESSFULLY DO SO.

The tourism factor

The top museums that appear on our charts are primarily located in major destination cities, where tourism numbers were strong in 2019, and many rely on tourists for at least 50.0% of attendance. But due to the global pandemic and recession, tourism has declined significantly. During the Great Recession of 2008, museums with a resident base benefited from the staycation trend, serving as substitute products for more expensive vacations and entertainment options.

Social experiences

In 2020 however, the current pandemic raises special health concerns regarding indoor spaces. Some trends that have helped museums bring in new audiences and revenue — such as lively evening social events featuring music, food, and curated drinks; yoga meetups; food halls; immersive, in-person experiences; and Instagram moments, have been put on hold given the need for social distancing.

Yet — using Asia as a model — based on how the sector recovered after the SARS epidemic of 2003, and observing entertainment venues of all types now where COVID levels have declined sufficiently to allow for cautious re-openings, visitor behavior indicates that there will be significant demand for in-person, social experiences once the pandemic declines.

Like many industries, the growth of virtual and online programming has accelerated rapidly among museums, with a diverse array of content drawing record numbers of people to museum websites and social media. While COVID has shuttered museum buildings, it has expanded their markets and audiences through online platforms. This increased online presence has accelerated the trend that was already present of engaging visitors in content creation, conversation and storytelling.



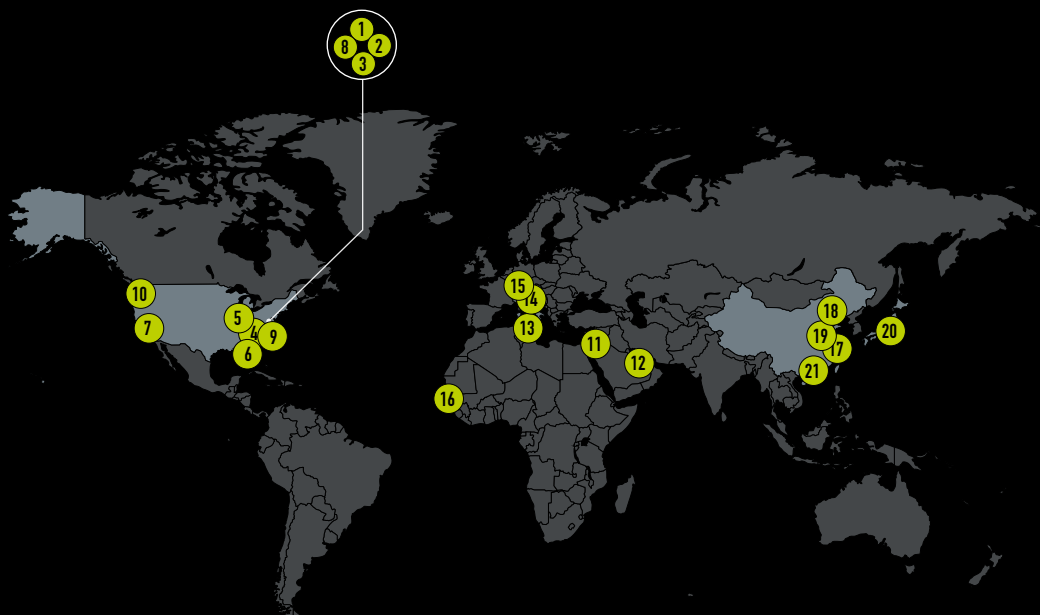
MUSEUMS HAVE PROVEN THEMSELVES AS RESILIENT AND ABLE TO ADAPT TO MEET THE NEEDS OF CURRENT AND NEW AUDIENCES.

Adapting to serve the community

With online tools, museums can respond more quickly to current issues and be an important and relevant part of community and civic discourse. Recent discussions at the American Alliance of Museums virtual conference highlighted the call for museums to serve their community with respect to equity and racial issues that have come to the forefront recently. While museums were already viewed as important sources of information on scientific, historical, and cultural topics, this role has intensified significantly in recent months. The provision of reliable and credible perspectives and information by museums against the backdrop of an overwhelming amount of media is another trend accelerated by COVID.

Museums have proven themselves as resilient and able to adapt to meet the needs of current and new audiences, as shown by new visitor experiences and programming developed in recent years. Museums have become places where communities come together, which will be needed more than ever post-pandemic. This year’s Museum Index, in addition to the data from the past seven years during which we have tracked attendance and studied trends at the top museums in the world, will serve as an important benchmark against which to measure the impact of COVID and track the pace of the industry’s recovery.

NEW AND NOTABLE MUSEUMS 2019



- 1 STATUE OF LIBERTY MUSEUM, NEW YORK CITY, U.S.
- 2 THE SHED, NEW YORK CITY, U.S.
- 3 AMERICAN KENNEL CLUB MUSEUM OF THE DOG, NEW YORK CITY, U.S.
- 4 NATIONAL CHILDREN'S MUSEUM, WASHINGTON, D.C., U.S.
- 5 MASCOT HALL OF FAME, WHITING, INDIANA, U.S.
- 6 NORTON MUSEUM OF ART, WEST PALM BEACH, FLORIDA, U.S.
- 7 MUSEUM OF DREAM SPACE (MODS), LOS ANGELES, CALIFORNIA, U.S.
- 8 POSTER HOUSE, NEW YORK CITY, NEW YORK
- 9 INTERNATIONAL SPY MUSEUM, WASHINGTON D.C., U.S.
- 10 BURKE MUSEUM, SEATTLE, WASHINGTON, U.S.
- 11 PETRA MUSEUM, WADI MUSA, JORDAN
- 12 NATIONAL MUSEUM OF QATAR, DOHA, QATAR
- 13 MUŻA, THE MALTA NATIONAL COMMUNITY ART MUSEUM, VALLETTA, MALTA
- 14 LUMEN MUSEUM OF MOUNTAIN PHOTOGRAPHY, MAREO, SOUTH TYROL, ITALY
- 15 MUZEUM SUSCH, SUSCH, SWITZERLAND
- 16 MUSEUM OF BLACK CIVILISATIONS, DAKAR, SENEGAL
- 17 TEAMLAB BORDERLESS SHANGHAI, SHANGHAI, CHINA
- 18 NATIONAL MARITIME MUSEUM OF CHINA, TIANJIN, CHINA
- 19 WEST BUND MUSEUM, SHANGHAI, CHINA
- 20 SNOOPY MUSEUM TOKYO, JAPAN
- 21 K11 MUSEA, TSIN SHA TSUI, HONG KONG

NEW AND NOTABLE MUSEUMS AND EMERGING TRENDS

Around the world there were many museum openings in 2019, some of which provide a window into current trends and changes that move beyond traditional industry models. Museums are leveraging their brand power by expanding to multiple locations, experiences, and venue types. Cultural experiences are being integrated into retail in partnership with museums. Collaborations between some of the largest museums in the world and new museums have developed in satellite site locations. Digital technology plays an ever-increasing role.

NORTH AMERICA

Statue of Liberty Museum, New York City

The \$70 million Statue of Liberty Museum opened in May 2019. The museum features three galleries with cultural artifacts and multimedia displays telling the story of the Statue of Liberty, its creation, and ideals. The museum includes the original torch which was replaced in 1984. It is estimated that 50% of Liberty Island visitors will visit the museum.

The Shed, New York City

Opened in April 2019, this new, 200,000 square foot multi-use arts center includes two galleries with rotating exhibits, a 500-seat theater, and a concert hall. It opened with Soundtrack of America, a five-night concert series celebrating the cultural impact of African American music.



The Shed, New York City, NY, U.S.
© Timothy Schenck, courtesy The Shed



Mascot Hall of Fame, Whiting, IN, U.S.
© Charlie Simotaikis Photography

American Kennel Club Museum of the Dog, New York City

The AKC Museum of the Dog moved back to New York and opened in February 2019 after being in St. Louis for 32 years. The museum features one of the largest collections of canine-related artwork and allows visitors to find their perfect dog at a photo kiosk that matches them to a dog breed.

National Children's Museum, Washington, D.C.

This new, 30,000 square foot museum opened in November 2019 and includes large science exhibits, interactive stations, a 50-foot Dream Machine play structure, and Bikini Bottom, which houses an augmented reality SpongeBob SquarePants experience created by Nickelodeon.

Other new museums or major museum expansion in North America:

Mascot Hall of Fame, Whiting, Indiana

Museum dedicated to the history of mascots, how mascots are made, and mascot memorabilia, where visitors can design their own mascots and launch virtual t-shirt cannons. Grand-opened in April 2019.

Norton Museum of Art, West Palm Beach, Florida

\$100 million renovation and expansion, opened in February 2019.

Museum of Dream Space (MODS), Los Angeles, California

New digital art museum, opened in Beverly Hills in 2019 and anticipated to open two new locations in Hollywood and Las Vegas in 2020.

Poster House, New York City, New York

Billed as the first museum in the US dedicated exclusively to posters, opened in June 2019.

International Spy Museum, Washington D.C.

New 140,000 square foot building with more than double the amount of education and programming space, including 30.0% more permanent exhibit area, opened May 2019.

Burke Museum, Seattle, Washington

The expansion afforded by the museum's new 130,000 square foot building, opened in October 2019, has allowed it to showcase its large collection of fossils, artifacts, and American Indian art.

ASIA

Snoopy Museum Tokyo, Japan

The Snoopy Museum Tokyo reopened in December 2019 as an expanded facility in a new location in Machida, Tokyo. It replaced the previous museum located in Roppongi. The new museum is an official satellite of the Charles M. Schultz Museum and has expanded to include a PEANUTS Café, a workshop for making plush toys, children's workshop, private library, special exhibitions, and museum store.



Snoopy Museum Tokyo, Japan
© Snoopy Museum Tokyo

teamLab Borderless Shanghai, Shanghai, China

In November 2019, the teamLab art collective launched teamLab Borderless Shanghai, its second museum of digital art supporting immersive visitor interactivity and featuring a series of themed galleries within a 70,000 square foot building. The new digital museum follows the success of MORI Building Digital Art Museum: teamLab Borderless, which opened in Tokyo in 2018 and was honored in 2019 with a TEA Thea Award.

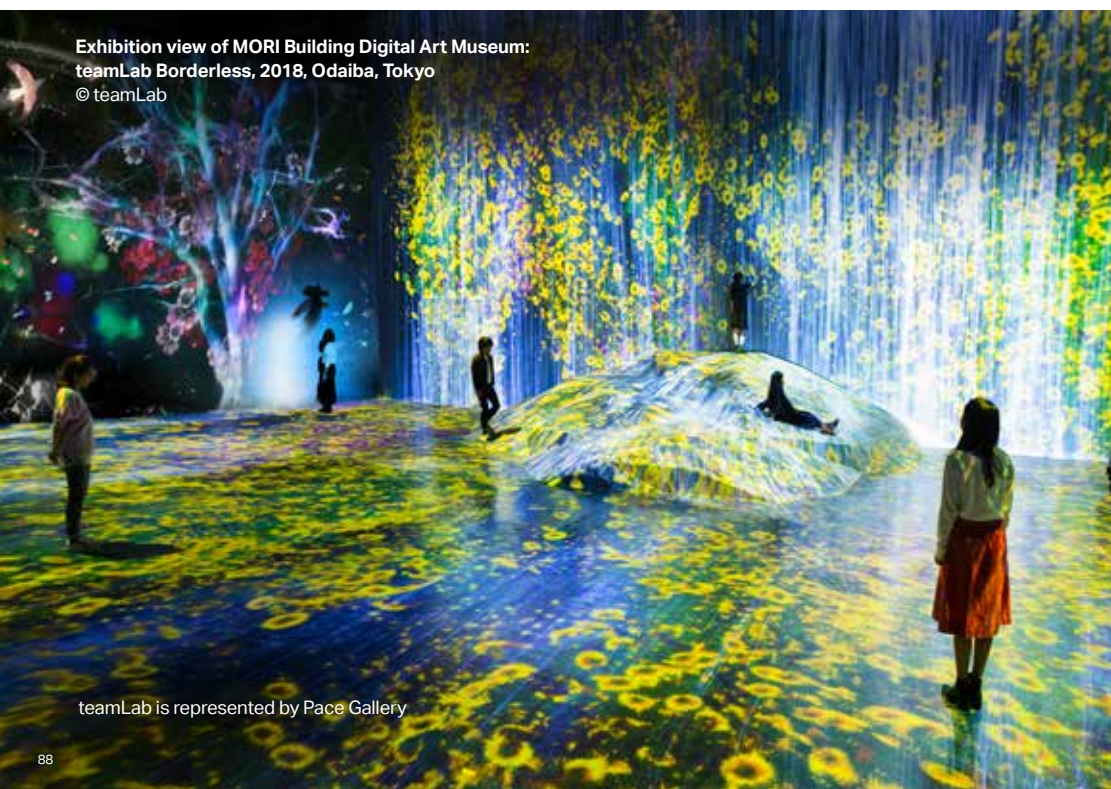
teamLab has a strong presence throughout Asia, in Japan, Singapore, China, and Taiwan, but also has current and future planned experiences in Europe, North America, and Australia. It is part of a burgeoning trend of immersive experiences that integrate digital technology and art, and its most well-known locations attract more than a million visitors annually.

National Maritime Museum of China, Tianjin, China

This nearly 900,000 square foot museum opened in May 2019 in Northern China. Designed by Australian firm Cox Architecture, it has approximately 250,000 square feet of exhibit area, with each hall dedicated to a different aspect of China's marine heritage such as nature and ocean, world maritime civilization, Chinese marine culture and historic vessels.



Petra Museum, Wadi Musa, Jordan
© Charlie Simotaikis Photography



Exhibition view of MORI Building Digital Art Museum:
teamLab Borderless, 2018, Odaiba, Tokyo
© teamLab

teamLab is represented by Pace Gallery

West Bund Museum, Shanghai, China

The new West Bund Museum in Shanghai and the Centre Pompidou in Paris have undertaken a five-year cultural exchange from 2019-2024 with a series of joint exhibitions highlighting selected art of Europe and China. The West Bund Museum, which officially opened November 8, 2019, joins a stretch of museums along the Huangpu River in Xuhui district. The 270,000 square-foot structure was designed by British architect David Chipperfield.

K11 Musea, Tsin Sha Tsui, Hong Kong

Opened in December 2019, K11 Musea is an anchor for a 10-year major redevelopment of Victoria Dockside in Kowloon, Hong Kong. It includes 250 retailers, 70 destination restaurants, 40 artist installations, and numerous educational programs. The K11 brand has developed a hybrid cultural retail experience targeting millennials.

It includes the "K11 Artist Klub," a membership-based organization where "artists and art lovers converge to interact and build dialogues that boost the development and appreciation of art."

EMEA

Petra Museum, Wadi Musa, Jordan

Opened on World Heritage Day in April 2019 located next to the main entrance of Petra Archeological Park, this new, 20,000 square foot museum has eight galleries highlighting the lives of former inhabitants and educating visitors about the importance of conservation and cultural heritage.



National Museum of Qatar, Doha, Qatar

MUŻA, The Malta National Community Art Museum, Valletta, Malta

This museum opened at the end of 2018 and features a collection of over 20,000 works of European art. It combines the art with audiovisual presentations that allow visitors to learn more about the artists' lives and inspirations.

Muzeum Susch, Susch, Switzerland

This new contemporary art museum located in the Swiss Alps was built in a 12th century monastery and brewery, with gallery spaces carved into the surrounding mountains. It was funded by Polish billionaire Grażyna Kulczyk and is intended to feature work of women and underrepresented artists.

National Museum of Qatar, Doha, Qatar

This new, 430,000 square-foot museum opened in March 2019, replacing the Qatar National Museum. The architecture by Jean Nouvel was inspired by the desert rose crystal, designed around Sheikh Abdullah bin Jassim Al Thani's Palace and integrates immersive video screens and dioramas. The history and culture of Qatar are interpreted through exhibits including thousands of artifacts along with immersive experiences.

Museum of Black Civilisations, Dakar, Senegal

Opened at the end of 2018, this 150,000 square foot museum showcases scientific and cultural contributions of Africa. It features exhibits that cover these topics across geographies and history. There is currently gallery space that is not yet being used, anticipated to house repatriated African artwork in the future.

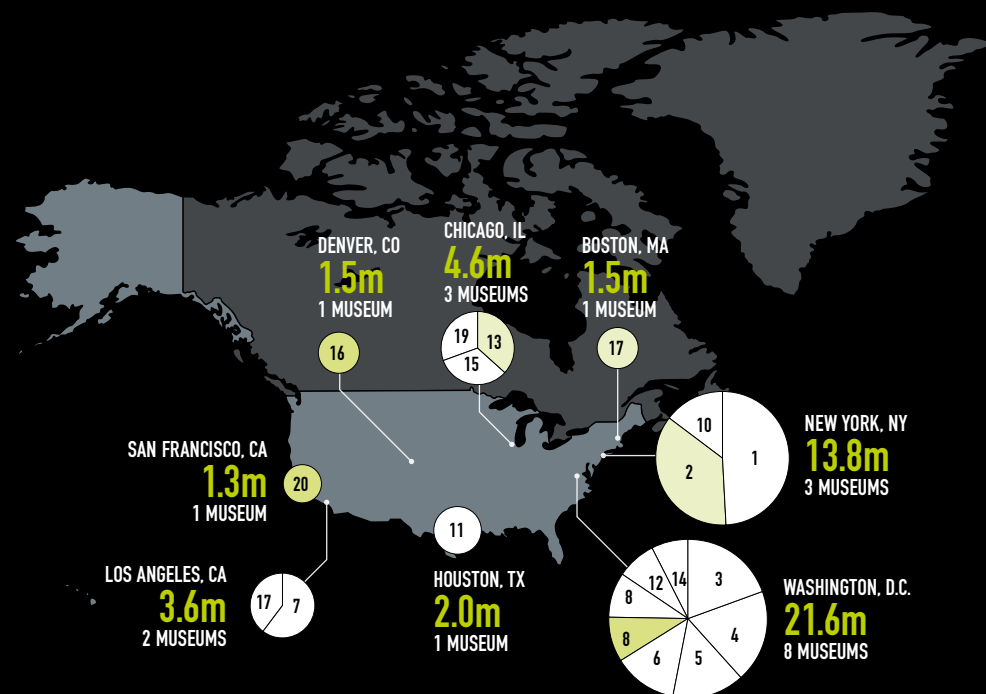
Lumen Museum of Mountain Photography, Mareo, South Tyrol, Italy

This new museum opened at the end of 2018 with 20,000 square feet of galleries featuring mountain photography through the years by some of the most well-known mountain photographers internationally. A unique aspect of this museum is its location at the top of Mount Kronplatz, 7,000 feet above sea level.

Lumen Museum of Mountain Photography, Mareo, South Tyrol, Italy © Skirama Kronplatz



TOP 20 MUSEUMS NORTH AMERICA

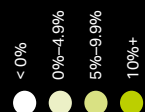


RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	FREE/PAID
1	THE METROPOLITAN MUSEUM OF ART, NEW YORK, NY, U.S.	-8.0%	6,770,000	7,360,000	P
2	AMERICAN MUSEUM OF NATURAL HISTORY, NEW YORK, NY, U.S.	0.0%	5,000,000	5,000,000	P
3	NATIONAL MUSEUM OF NATURAL HISTORY, WASHINGTON, DC, U.S.	-12.5%	4,200,000	4,800,000	F
4	NATIONAL GALLERY OF ART, WASHINGTON, DC, U.S.	-7.5%	4,074,000	4,404,000	F
5	NATIONAL AIR AND SPACE MUSEUM, WASHINGTON, DC, U.S.	-48.4%	3,200,000	6,200,000	F
6	NATIONAL MUSEUM OF AMERICAN HISTORY, WASHINGTON, DC, U.S.	-31.7%	2,800,000	4,100,000*	F
7	CALIFORNIA SCIENCE CENTER, LOS ANGELES, CA, U.S.	-12.7%	2,200,000	2,520,000	P
8	NATIONAL MUSEUM OF AFRICAN AMERICAN HISTORY AND CULTURE, WASHINGTON, DC, U.S.	5.3%	2,000,000	1,900,000*	F
	SMITHSONIAN AMERICAN ART MUSEUM (WITH THE RENWICK GALLERY), WASHINGTON DC, U.S.	-36.5%	2,000,000	3,150,000*	F
10	THE MUSEUM OF MODERN ART, NEW YORK, NY, U.S.	-28.2%	1,992,000	2,774,000	P
11	HOUSTON MUSEUM OF NATURAL SCIENCE, HOUSTON, TX, U.S.	-14.7%	1,974,000	2,313,000	F
12	NATIONAL PORTRAIT GALLERY, WASHINGTON, DC, U.S.	-26.1%	1,700,000	2,300,000*	F
13	THE ART INSTITUTE OF CHICAGO, CHICAGO, IL, U.S.	2.7%	1,666,000	1,622,000	P
14	U.S. HOLOCAUST MEMORIAL MUSEUM, WASHINGTON, DC, U.S.	-3.0%	1,600,000	1,650,000	P
15	FIELD MUSEUM OF NATURAL HISTORY, CHICAGO, IL, U.S.	-2.0%	1,494,000	1,525,000	P
16	DENVER MUSEUM OF NATURE & SCIENCE, DENVER, CO, U.S.	5.1%	1,487,000	1,415,000	P
17	MUSEUM OF SCIENCE, BOSTON, MA, U.S.	0.0%	1,458,000	1,458,000	P
	THE J. PAUL GETTY CENTER, LOS ANGELES, CA, U.S.	-4.6%	1,439,000	1,509,000	F
19	MUSEUM OF SCIENCE AND INDUSTRY, CHICAGO, IL, U.S.	-10.7%	1,388,000	1,555,000*	P
20	CALIFORNIA ACADEMY OF SCIENCES, SAN FRANCISCO, CA, U.S.	2.0%	1,321,000	1,295,000	P
TOP 20 TOTAL ATTENDANCE 2019			49,763,000	58,850,000	
TOP 20 TOTAL ATTENDANCE GROWTH 2018-19		-13.2%	49,763,000	60,337,000	

© 2020 TEA / AECOM

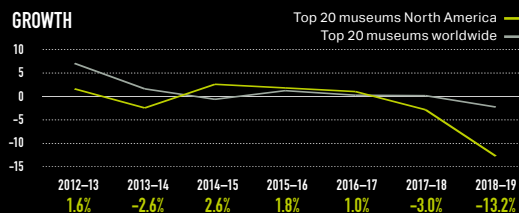
* Adjustment versus the figure we published in last year's report

KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked museum indicated by number. Shading indicates attendance growth at the ranked museum versus all other ranked museums.

GROWTH



© 2020 TEA / AECOM

-13.2%

Top 20 museums North America attendance growth 2018-19

49.8m

Top 20 museums North America attendance 2019

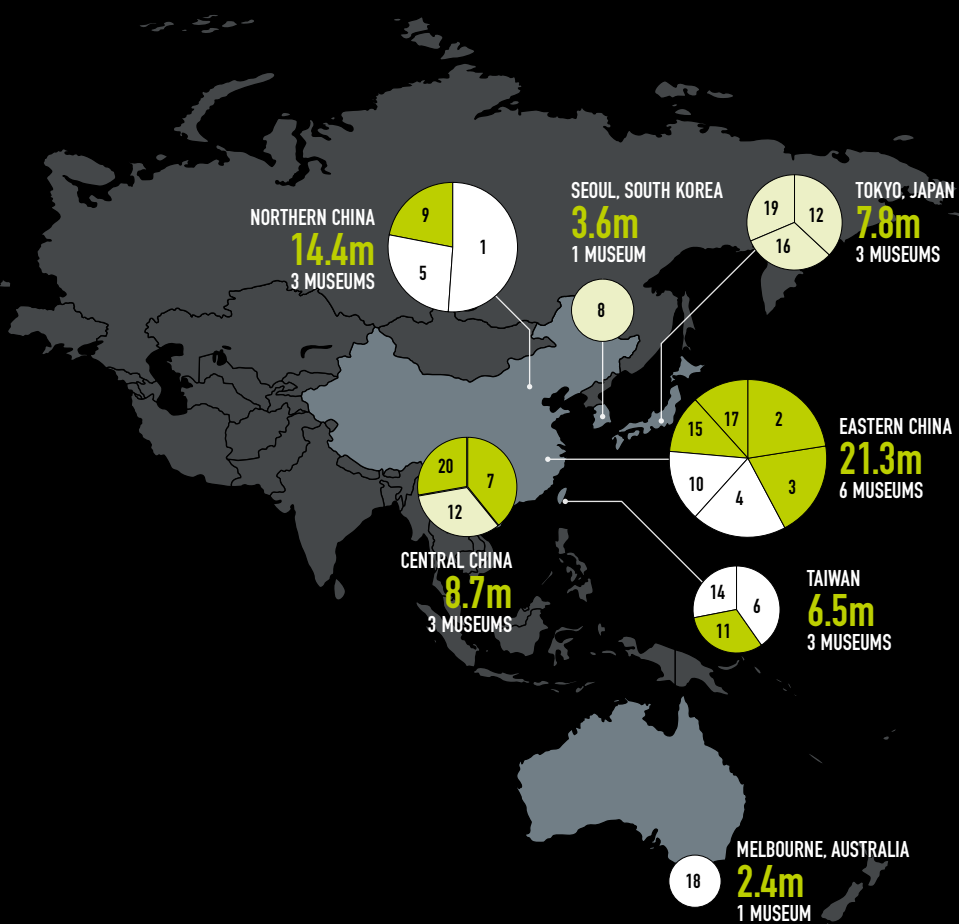
60.3m

Top 20 museums North America attendance 2018

© 2020 TEA / AECOM

93

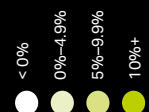
TOP 20 MUSEUMS ASIA-PACIFIC



RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	FREE/PAID
1	NATIONAL MUSEUM OF CHINA, BEIJING, CHINA	-14.2%	7,390,000	8,610,000	F
2	SHANGHAI SCIENCE & TECHNOLOGY MUSEUM, SHANGHAI, CHINA	36.3%	4,824,000	3,540,000	P
3	NANJING MUSEUM, NANJING, CHINA	13.6%	4,169,000	3,670,000	F
4	ZHEJIANG MUSEUM, HANGZHOU, CHINA	-1.2%	4,150,000	4,200,000	F
5	CHINA SCIENCE TECHNOLOGY MUSEUM, BEIJING, CHINA	-11.6%	3,891,000	4,400,000	P
6	NATIONAL PALACE MUSEUM, TAIPEI, TAIWAN	-0.7%	3,832,000	3,860,000	P
7	XIAN MUSEUM, XIAN, CHINA	40.7%	3,420,000	2,430,000	F
8	NATIONAL MUSEUM OF KOREA, SEOUL, SOUTH KOREA	1.6%	3,354,000	3,300,000	F
9	TIANJIN NATURAL HISTORY MUSEUM, TIANJIN, CHINA	12.3%	3,150,000	2,805,000	F
10	HUNAN MUSEUM, CHANGSHA, CHINA	-12.8%	3,140,000	3,600,000	F
11	NATIONAL TAIWAN SCIENCE EDUCATION CENTER, TAIPEI, TAIWAN	46.0%	3,000,000	2,055,000	P
12	SHANXI HISTORY MUSEUM, XIAN, CHINA	3.6%	2,900,000	2,800,000	F
13	TOKYO METROPOLITAN ART MUSEUM, TOKYO, JAPAN	3.0%	2,874,000	2,790,000	P
14	NATIONAL MUSEUM OF NATURAL SCIENCE, TAICHUNG, TAIWAN	-10.5%	2,650,000	2,960,000	P
15	SHANGHAI NATURAL HISTORY MUSEUM, SHANGHAI, CHINA	16.9%	2,549,000	2,180,000	P
16	NATIONAL MUSEUM OF NATURE AND SCIENCE, TOKYO, JAPAN	0.0%	2,460,000	2,460,000	P
17	ZHEJIANG MUSEUM OF NATURAL HISTORY, HANGZHOU, CHINA	13.1%	2,443,000	2,160,000	P
18	NATIONAL GALLERY OF VICTORIA, MELBOURNE, AUSTRALIA	-24.0%	2,433,000	3,200,000	F
19	TOKYO NATIONAL MUSEUM, TOKYO, JAPAN	0.0%	2,431,000	2,430,000	F
20	HUBEI PROVINCIAL MUSEUM, WUHAN, CHINA	16.2%	2,400,000	2,065,000	F
TOP 20 TOTAL ATTENDANCE 2019			67,460,000	65,515,000	
TOP 20 TOTAL ATTENDANCE GROWTH 2018-19		-0.4%	67,460,000	67,700,000	

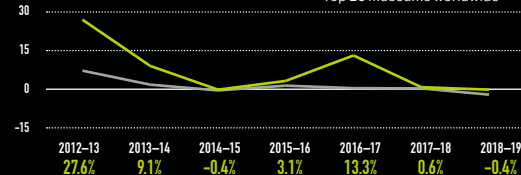
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KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked museum indicated by number. Shading indicates attendance growth at the ranked museum versus all other ranked museums.

GROWTH



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-0.4%

Top 20 museums Asia-Pacific attendance growth 2018-19

67.5m

Top 20 museums Asia-Pacific attendance 2019

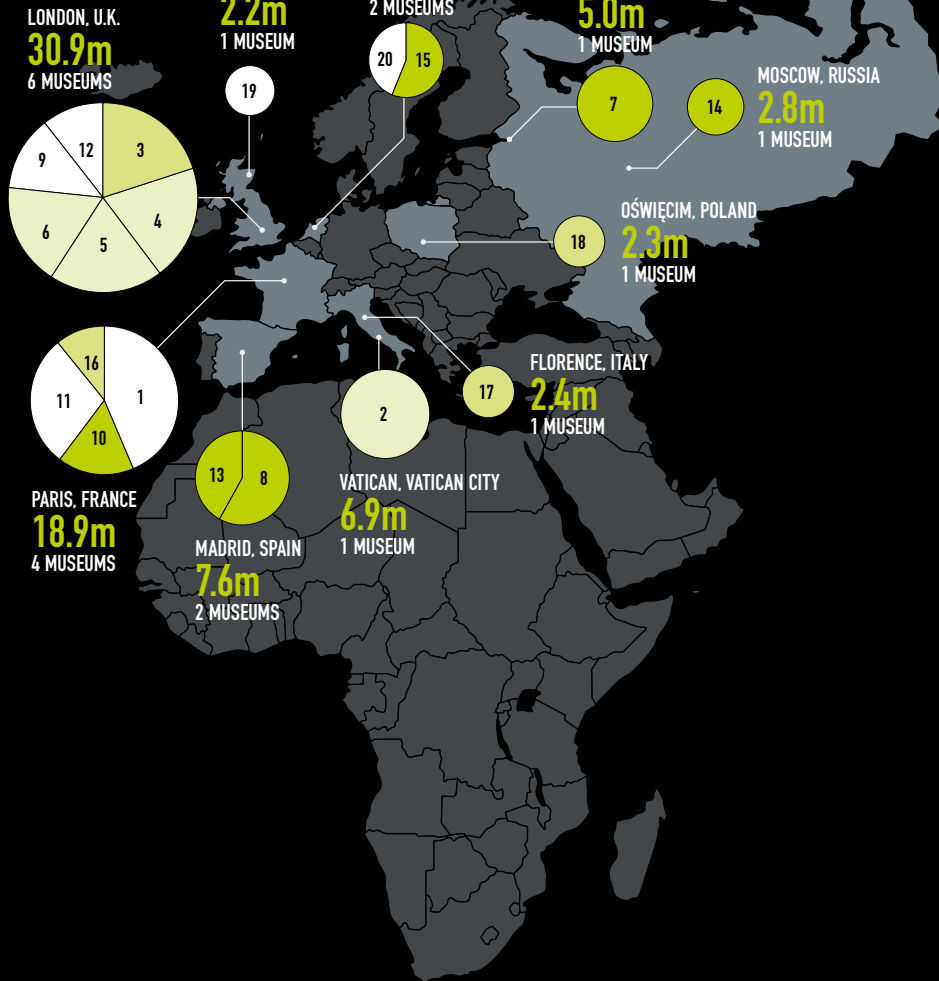
67.7m

Top 20 museums Asia-Pacific attendance 2018

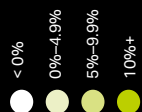
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TOP 20 MUSEUMS EMEA

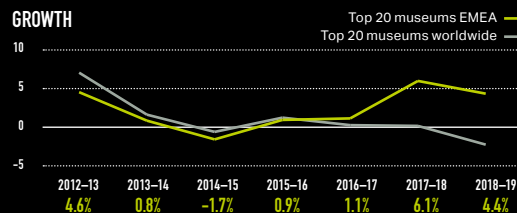


KEY



Circles represent size of attendance at ranked parks at the geography indicated. Slices within circles represent proportion of attendance at the geography from the ranked museum indicated by number. Shading indicates attendance growth at the ranked museum versus all other ranked museums.

GROWTH



RANK	MUSEUM LOCATION	% CHANGE	ATTENDANCE 2019	ATTENDANCE 2018	FREE/Paid
1	LOUVRE, PARIS, FRANCE	-5.9%	9,600,000	10,200,000	P
2	VATICAN MUSEUMS, VATICAN, VATICAN CITY	1.9%	6,883,000	6,756,000	P
3	BRITISH MUSEUM, LONDON, U.K.	5.8%	6,208,000	5,869,000	F
4	TATE MODERN, LONDON, U.K.	4.6%	6,098,000	5,829,000	F
5	NATIONAL GALLERY, LONDON, U.K.	4.8%	6,011,000	5,736,000	F
6	NATURAL HISTORY MUSEUM, LONDON, U.K.	3.8%	5,424,000	5,226,000	F
7	STATE HERMITAGE, ST PETERSBURG, RUSSIA	15.4%	4,957,000	4,294,000	P
8	REINA SOFÍA, MADRID, SPAIN	13.5%	4,426,000	3,898,000	F
9	VICTORIA & ALBERT MUSEUM, LONDON, U.K.	-1.2%	3,921,000	3,968,000	F
10	MUSÉE D'ORSAY, PARIS, FRANCE	15.0%	3,652,000	3,175,000	F
11	CENTRE POMPIDOU, PARIS, FRANCE	-7.9%	3,270,000	3,552,000	P
12	SCIENCE MUSEUM (SOUTH KENSINGTON), LONDON, U.K.	-1.0%	3,254,000	3,286,000	P
13	MUSEO NACIONAL DEL PRADO, MADRID, SPAIN	10.7%	3,203,000	2,893,000	P
14	STATE TRETYAKOV GALLERY, MOSCOW, RUSSIA	32.0%	2,836,000	2,149,000	P
15	RIJKSMUSEUM, AMSTERDAM, THE NETHERLANDS	17.4%	2,700,000	2,300,000	P
16	CITE DES SCIENCES ET DE L'INDUSTRIE, PARIS, FRANCE	6.2%	2,370,000	2,231,000	P
17	GALLERIA DEGLI UFFIZI, FLORENCE, ITALY	5.9%	2,362,000	2,230,000*	P
18	AUSCHWITZ-BIRKENAU MUSEUM, OŚWIĘCIM, POLAND	6.9%	2,300,000	2,152,000	P
19	NATIONAL MUSEUM OF SCOTLAND, EDINBURGH, U.K.	-0.8%	2,210,000	2,228,000	F
20	VAN GOGH MUSEUM, AMSTERDAM, THE NETHERLANDS	-4.8%	2,100,000	2,206,000	P
TOP 20 TOTAL ATTENDANCE 2019			83,785,000	80,178,000	
TOP 20 TOTAL ATTENDANCE GROWTH 2018-19			4.4%	83,785,000	80,278,000

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* Adjustment versus the figure we published in last year's report

4.4%

Top 20 museums EMEA attendance growth 2018-19

83.8m

Top 20 museums EMEA attendance 2019

80.3m

Top 20 museums EMEA attendance 2018

ABOUT THE STUDY

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

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

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

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

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

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

Due to differences in reporting across operators and regions, there is some variation in the time periods for which figures are reported. Unless otherwise noted, figures for North America and Europe are calendar year figures, while most figures for Asia-Pacific are fiscal year figures. In Asia-Pacific, for those parks/museums with a fiscal year ending from June 30 to December 31, AECOM researchers use the current fiscal year number in our tables, while for those parks/museums with a fiscal year ending early in the year, for example on March 31, the following fiscal year numbers are used in the tables. By way of example, Ocean Park Hong Kong fiscal year ends June 30, 2019, so fiscal year 2019 is used in the 2019 table.



JOHN ROBINETT
Senior Vice President –
Economics, AECOM



JUDITH RUBIN
Director of Publications,
TEA

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

FREQUENTLY ASKED QUESTIONS

Why should parks share their numbers?

When operators share their information, it is good for the industry. It ties directly into re-investing wisely in ways that bring in more attendance and more repeat visitation, driving revenue and profits. Tracking differences and fluctuations in attendance helps the industry recognize what drives changes in attendance. Knowing what works, what doesn't work — and where and why — allows operators to make wise investment decisions and to know what results can be expected. That's the heart of market and feasibility analysis.

Do some operators exaggerate in order to look more successful? What can you do about that?

Our role is to share what the industry operators say officially or, if that information is not provided, to share our best professional estimate. It's possible that some are over-reporting their numbers. We can't control that. However, all of the major operators are publicly owned and therefore obliged to report financial performance information at the corporate level, even if they don't break it down to the park level.

Over-reporting may get an operator temporarily higher on the list than its competitors, but it will cause problems, some in the near term and others down the road. In the near term, if attendance is up but revenues or profitability are not, it raises questions. In the longer term, eventually, they'll hit a point where the numbers are too far off to be credible. Misrepresenting also complicates the picture if the company eventually goes public, or is acquired or wants to sell off an individual property. Operators know this.

Misreporting also raises false expectations. If you're trying to make an investment decision and forecast future performance, you need accurate information. If a property is not investing in regular improvements,

yet reports that numbers are stable or growing, the numbers are suspect. Moreover, it's not the kind of secret that can be kept for long. People move from one operator to another and they take that knowledge with them. Consultants are called upon to help interested parties evaluate ongoing operations as well as potential new investments and activities. In other words, over-reporting will eventually come to a point of correction. Our advice is to trust the process.

How do you estimate figures for individual parks and museums that don't report them?

Fortunately, with more than 60-years experience working in the attractions industry, AECOM's Economics practice has a strong understanding of what drives performance at the park level and a robust process to estimate attendance where necessary. The following outlines our general process:

- We start by reviewing publicly available information about the performance of the multi-park/attraction operators and also the individual parks/museums. We also review information that we have collected as part of the previous year's report and throughout the year.
- Where park/museum-level information is missing, the multi-park operators and the individual parks/museums are asked to provide their attendance figures, and many of them do so directly.
- Where specific park/museum-level figures are not received from the operator, AECOM researchers use a detailed methodology that considers the following: historic attendance trends at the park/museum; generally available information on the park/museum and/or operator; park/museum changes, such as new rides, areas, shows, exhibits, ticket prices, intellectual property connections, etc.; general economy of

the nation and the specific metropolitan area; tourism trends nationally and in the metropolitan area; for parks, weather trends in the area, particularly during peak periods; the performance of nearby parks/museums and other attractions; media coverage about the operator/park/museum; and select factors as relevant.

- Park/museum operators are also given the opportunity to review and comment on AECOM's estimate before the Theme Index and Museum Index are finalized and published. Of those that don't provide official figures at the park/museum level, the research team generally receives some form of feedback regarding the individual parks/museums. Leadership at TEA (the Themed Entertainment Association, which publishes and helps edit the report) plays an important role here, encouraging responses.
- As the leading provider of business planning studies worldwide for attractions, AECOM's group also works frequently with all of the major operators, parks and museums, providing the AECOM team the opportunity to periodically compare estimates with actual exact figures. They are used to refine the methodology where necessary.
- As part of its active work in these markets and to maintain awareness of what drives performance and the macroeconomics of different countries, members of the research group visit the parks and museums, watching for new development and trends. This helps to bring professional processes to the industry so that a higher level of quality can be transmitted from more developed markets into emerging markets. AECOM consultants frequently work for operators who are looking to enter the attractions business, or to grow or improve their existing operations. They also team with attraction master planners and

designers to help correctly position and right-size parks and museums to match their market potential and optimize their financial performance. In addition, they regularly speak at industry events, such as those organized by TEA, IAAPA, WWA, AAM, AZA, ULI, and many others, about industry trends, and also contribute to articles to industry publications and in more general media publications.

What causes wide swings in performance at parks and museums?

As can be seen from the process outlined above, there are many factors affecting the performance of a park or museum, including past performance, new offerings, the economy, tourism, weather, media coverage, management, and more. Typically, large changes in attendance, up or down, are driven by major changes in one or more of these factors, with the relationship between the two frequently clear when examined in detail.

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

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

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

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

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

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

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

Generally, the answer is yes, with attractions of all types and scales facing many of the same ongoing challenges, which include meeting visitor expectations, hiring and retaining good management and staff, efficient operations, understanding and applying new technology, addressing the need for continuous reinvestment, and the like. That said, smaller and more regional venues have their own unique place in the market. They have distinct challenges when it comes to marketing, investment and guest retention, making the most of smaller budgets, and differentiating themselves from other leisure options competing for visitors' time and money. How they respond to those challenges often sets an example of creativity, innovation, leadership and/or economic stimulus that influences the rest of the sector — many such examples have appeared in the annual slate of TEA Thea Awards recipients over the years.

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

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

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

About AECOM

AECOM is the world's premier infrastructure firm, delivering professional services throughout the project lifecycle — from planning, design and engineering to consulting and construction management. We partner with our clients in the public and private sectors to solve their most complex challenges and build legacies for generations to come. On projects spanning transportation, buildings, water, governments, energy and the environment, our teams are driven by a common purpose to deliver a better world. AECOM is a *Fortune 500* firm with revenue of approximately \$20.2 billion during fiscal year 2019.

See how we deliver what others can only imagine at aecom.com and [@AECOM](https://twitter.com/AECOM).

About the Themed Entertainment Association (TEA)

Through its activities in the global themed entertainment community, TEA leads the conversation about how great guest experiences are conceived and realized, and helps focus attention on themed entertainment as a vital niche of popular culture, and its essential role in global economic development. As a nonprofit membership association representing the creators of compelling places and experiences worldwide, TEA encompasses some 1,800 member companies and produces a full calendar of conferences and events including the prestigious, annual TEA Thea Awards. TEA was founded in 1991 and is headquartered in the Los Angeles area.

Visit www.teaconnect.org. On Twitter: [@TEA_Connect](https://twitter.com/TEA_Connect).

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/resources/theme-index