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# Are European theme parks likely to suffer from long COVID?

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## Abstract

COVID-19 has had a major impact on the theme park industry. Visits to European parks were significantly lower in 2020 than the year before. This article discusses the short-term and long-term economic consequences of the pandemic for the theme park industry. Attitudinal loyalty, inertia effects of guest satisfaction on repeat visits, (deferred) reinvestments, and the difference between theme and amusement parks will be considered. To compensate for losses in 2020, many parks increased their visitor numbers in the 2021 season to the maximum permitted capacity, especially in the summer months. As a result, analysis of waiting times at 22 investigated European parks shows that the average waiting times in the summer season of 2021 were more than 20 per cent higher than the average in the same weeks in the previous years. This has a severe impact on the guest satisfaction of theme parks, leading to lower repeat visits in the (near) future. However, not every park is hurt equally bad by decreased Net Promoter Scores. Strong parks suffer more from the exponential and inertia effect from decreasing guest satisfaction (G-sat) scores but recover faster. Weaker parks, on the other hand, are less affected by the initial effect, but take longer to recover. Parks that had a healthy balance between attitudinal loyalty and repeat visits before the COVID-19 pandemic, which enabled them to build up a surplus of loyalty, will bounce back the fastest and strongest. Parks that have been vulnerable for some time due to low G-sat scores, partly due to limited investments and the urge to innovate, are more likely to suffer from long COVID.

**Keywords:** Theme parks; COVID-19; wait times; guest satisfaction; repeat visits.

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## 1. Introduction

COVID-19 has had a major impact on the theme park industry. Visits to European parks were significantly lower in 2020 than the year before. The TEA/AECOM attendance report recorded 22.2 million visits to the top 20 parks in 2020 compared to 64.5 million visits in 2019. This is a loss of 65.6% per cent. As a result, turnover plummeted and, despite government assistance, many parks closed the financial year with significant losses (Coates, 2021; Sarsfield-Hall, 2020). The Efteling (Netherlands) even reported a loss for the first time in its 70-year existence (Probst, 2021). Despite COVID-related capacity restrictions and temporary lockdown measures, visitor numbers at most European parks have shown an upward trend in 2021 and most parks are now looking at the future with a positive attitude (Coates, 2021). Therefore, it appears most European theme parks have recovered rapidly from the COVID-19 pandemic, but in analogy to medical long COVID one could question whether this applies to the whole industry. Have all European theme parks indeed recovered from the pandemic or are some parks likely to suffer from long COVID? This article discusses the economic consequences of the coronavirus pandemic for the European theme park industry on the important economic metrics guest satisfaction, experience, and loyalty (Milman, Tasci, & Wei, 2020).

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For a proper understanding of the economic consequences, we must distinguish between the short-term effects of the pandemic (2020-2022) and the long-term effects (2023 and beyond). It is also useful to make a distinction between the situation of amusement parks versus theme parks, as the effects could be different for both types of parks.

## 2. Short-term effects

In 2021 many parks increased their visitor numbers to the maximum permitted capacity, especially in the summer months (Coates, 2021). This is understandable because their cash flow was virtually non-existent and the fixed costs continued into the winter months (MacDonald, 2020; Sarsfield-Hall, 2020). As soon as parks were allowed to open again, cash was finally injected into the organizations and salaries and bills from suppliers could be paid again. The market for school trips, events, and business-to-business was still stalled, so the turnover mainly had to be realized through the regular visitor (Coates, 2021). Many parks have made a reasonable arrangement with their annual passholders (Levine, 2020) – such as temporary suspension of the subscription – so that this group also did not generate any substantial extra turnover in the first few months after reopening (Coates, 2021). But it did lead to extra crowds in the park. Due to the necessary measures, including mandatory social distancing in lines and in ride vehicles, keeping restaurants and indoor facilities closed, and one-way traffic in the park, the available capacity in the parks decreased while the demand from visitors increased (Coates, 2021). Due to travel restrictions, partly imposed by visitors themselves out of an abundance of caution, many holidaymakers were forced to spend their holidays in their own country (Coates, 2021). A visit to a regional theme park was the escape that they had been yearning for a year (TEA/AECOM, 2021; see also the contribution by Anton Clavé in this issue). This resulted in sold-out parks for weeks.

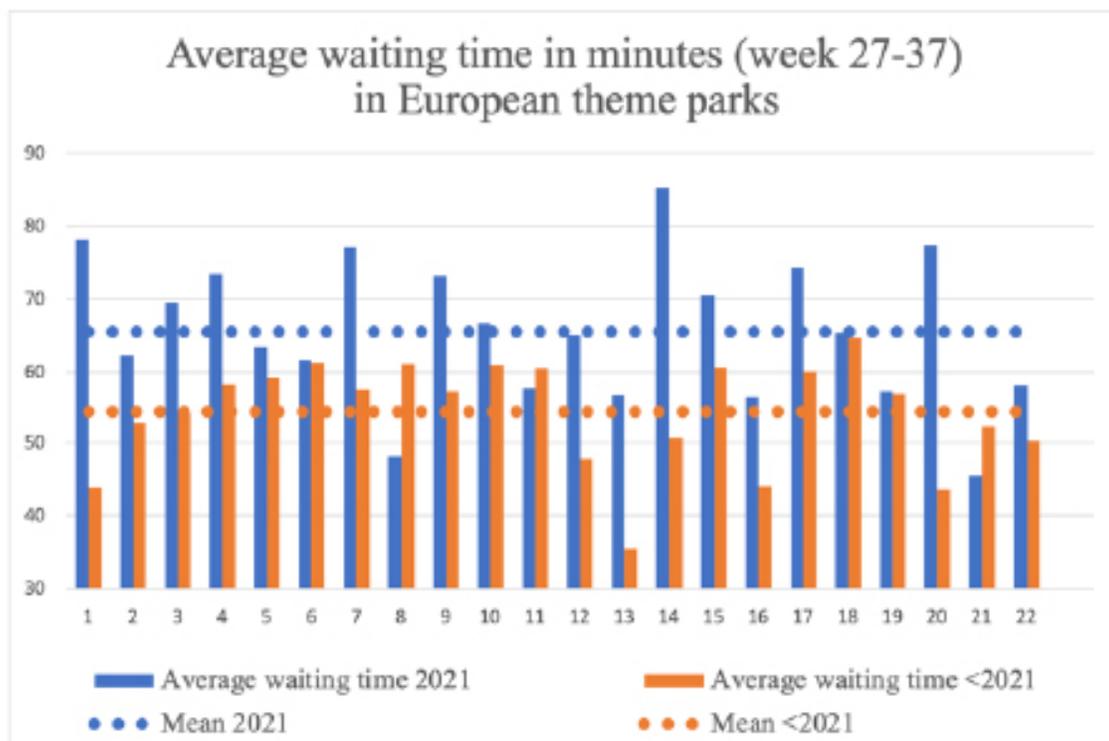


Fig. 1. Average waiting times in 22 European theme parks (post- and pre-COVID-19)

The author's analysis of the waiting times at 22 European parks (of which 8 are in the top ten with the highest number of visitors) shows that the average waiting times in the summer season of 2021, i.e. calendar weeks 27 to 37,

were more than 20% higher than the average in the same weeks in the previous years (20.9% increase; data retrieved from <https://queue-times.com/parks/>). As Fig. 1 depicts, there are, however, major differences between parks: only three of the 22 parks have shown a decline in waiting times, whereas waiting times have increased (significantly) in 19 of the 22 parks studied. The largest decrease is 23%; the highest increase is nearly 80%. Considering the negative relation between waiting times on the one hand and guest satisfaction, experience, and loyalty on the other hand (Milman, Tasci, & Wei, 2020), this increase in waiting times is not favorable.

Partly as a result of the increased waiting times, guest satisfaction has been under considerable pressure in the past year (Coates, 2021; James, 2021), and the Net Promoter Scores (NPS) of most parks have slipped. The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend a company's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with a company's product or service and the customer's loyalty to the brand. While the better-performing parks showed an NPS score of over 70% in previous years (Cornelis, 2017), many parks are currently happy if they are even able to close 2021 with a net positive NPS. This has consequences for repeat visits (Milman, Tasci, & Wei, 2020). Due to the exponential relationship between guest satisfaction (G-sat) scores and repeat visits (Parasuraman, Zeithaml, & Berry, 1985), a relatively small decrease in guest satisfaction for the higher-quality theme parks leads to a more than proportional decrease in visitor numbers in the following year. Due to the so-called inertia effect, the upward trajectory also takes longer than might be expected based on the decrease in G-sat (Cornelis, 2017). Trust takes time to build, but it is quickly lost. Cornelis (2017, p.79) shows that for an average-valued European theme park (with 500,000 annual visitors and a G-sat score of 3.5 on a 5.0 scale), a decrease in G-sat due to the inertia effect can lead to a reduced number of visitors over several years. The negative effects of decreased G-sat scores are less rigorous for the relatively poorer-rated theme parks because the relationship between satisfaction and repeat visits is less strong for this group of parks.

What we are actually seeing is that parks are currently capitalizing on their brand equity accumulated over the past few years. Visitor numbers are currently higher than might be expected based on current satisfaction measurements, simply because people can finally visit a theme park after a long period of limitations. Metaphorically speaking, parks live on the accumulated reserves of their attitudinal loyalty (Bandyopadhyay & Martell, 2007), where in the past they still had a surplus. This causes erosion of the brand (Keller, Apéria, & Georgson, 2008) and this will become visible in the near future. Disappointing visitor experience leads to complaints, dissatisfaction, less positive word-of-mouth communication, and ultimately to postponed repeat visits.

### 3. Long-term effects

The above effect is reinforced by the deferred investments of 2020 and 2021. Investments have been abruptly halted (MacDonald, 2020; Sarsfield-Hall, 2020) and as a result, the quality of the theme park experience is decreasing (TEA/AECOM, 2021). While we saw that in previous years European parks reinvested on average about 10-12% of their annual turnover in the park (Cornelis, 2011), in 2020 and 2021 it is only a fraction of this percentage (Probst, 2021). Many parks immediately halted planned investments for 2020, not knowing what the pandemic would bring. Barring a few notable investments, we still saw a hesitant investment policy in 2021 (Probst, 2021). With two financially challenging years in a row, it is also difficult for many parks to secure financing for 2022 (Coates, 2021; MacDonald, 2020), which could lead to an additional delay in the reinvestment. The Return on Investment (ROI) of a theme park investment depends on the budget decision given the context multiplied by the processing of the content (Cornelis, 2017). The budget decision consists of two aspects, namely the amount and the frequency of the investment. Due to the deteriorated financial situation of several (particularly smaller) parks (Probst, 2021), the ratio between capital expenditures and revenues (capex/revenues-ratio) will probably be adjusted downwards. Instead of an average of 10-12% per year, this might now drop to 8-10%, with a delayed effect of several years. Where any given park had planned to invest 25% of its turnover in a new attraction in 2020 and to subsequently maintain the effects in 2021 and 2022 with a smaller annual investment of approximately 5% of their yearly revenues (which in the end comes down to an average capex/revenues-ratio of approximately 10-12% per year), we see that this investment is now reduced to less than 20%, and moreover only implemented in 2022/2023. The now-eroded park will have an even longer road ahead to bounce back from the COVID situation.

A case of economic long COVID seems apparent. According to TEA/AECOM (2021), it is not reasonable to expect an instant return to the record numbers of 2019; a more realistic expectation would be to return to a level comparable to an average of the recent years prior to COVID, probably with a delay for the years after that. It will

take years before a healthy attitudinal loyalty is built up again (Keller, Apéria, & Georgson, 2008). Although investments will generate a growth in visitor numbers (Cornelis, 2011), the percentage increase in visitor numbers are expected to be lower at first than before the pandemic. Because most parks are in a temporary-growth situation, which means that investments have to be made to remain competitive (Cornelis, 2017), it could mean that these parks have to temporarily invest at a higher frequency to counteract the extinction effects. In such situations, an investment leads to a temporary increase of approximately two or three years in visitor numbers, after which the numbers drop back to (slightly above) the original level before the investment. However, due to the erosion of the park, the first investments will be necessary to bring the park back up to par. Subsequent investments can then ensure that there is temporary growth to allow the park to truly remain competitive. In other words, the park will first have to put things in order to return to healthy visitor numbers, also considering that behavioral loyalty is at least equal to attitudinal loyalty. Only then can the park focus on the future. The situation will be slightly different for parks that are in the permanent-growth phase of reinvestment, although these parks are also likely to suffer from deferred and lower reinvestment.

However, the above scenario does not apply to every park. The effects will be less severe for theme parks than for amusement parks. One could describe the difference between a theme park and an amusement park based on the experience offered to the guest (Cornelis, 2011). Amusement parks offer an *Erlebnis*-based experience which mainly involves primary, sensory, and emotional responses, whereas theme parks offer an *Erfahrung*-based experience, in which meaningful experiences – offered by immersive worlds, theming, and storytelling – are more important (Cornelis, 2017). Due to the nature of the desired experience at an amusement park, a large part of investment-related (repeat) visits can be allocated to ride-related investments. The principle of “seen it, done it, got the picture” applies especially to these *Erlebnis*-based amusement park visits. Because a visit to a theme park should primarily lead to an *Erfahrung* – instead of an *Erlebnis* – the sensations of new kicks and thrills play a lesser role than the re-experience of the immersive world, theming, and storytelling (Cornelis, 2017; Schulze, 1992). These *Erfahrung*-based experiences erode less quickly and are more resistant to temporary setbacks.

#### 4. Conclusion

In conclusion, we see two mutually reinforcing effects of the COVID-19 pandemic. On the one hand, there is an inertia effect towards repeat visits due to the decreasing G-sat scores as a result of capacity bottlenecks in 2021. In other words, due to longer waiting times in most European theme parks guest satisfaction has decreased, which will have a direct and delayed effect on repeat visits. On the other hand, this effect is further enhanced by the inertia effect of deferred investments. Reinvestments lead to more attractive parks and thus higher (repeat) visits, but because of this delay in reinvestments the attractiveness of the parks is under pressure, leading to less satisfied guests, and thus lower (repeat) visits. Strong parks suffer more from the exponential and inertia effect from decreasing G-sat scores but recover faster. Weaker parks, on the other hand, are less affected by the initial effect, but take longer to recover. Parks that had a healthy balance between attitudinal loyalty and repeat visits before the COVID-19 pandemic, which enabled them to build up a surplus of loyalty, will bounce back the fastest and strongest. Parks that have been vulnerable for some time due to low G-sat scores, partly due to limited investments and the urge to innovate, are more likely to suffer from long COVID. So, are European theme parks likely to suffer from long COVID? Most of the European parks will not suffer too much and will recover within the next few years. Some parks will recover sooner than others – especially high-rated theme parks – but the vulnerable parks will experience difficult times.

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