

# 8 Trends in Theme Park Development

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## 8 Trends in Theme Park Development

# An industry on the rise

It's a thrilling time for the theme park industry, full of challenges and opportunities.

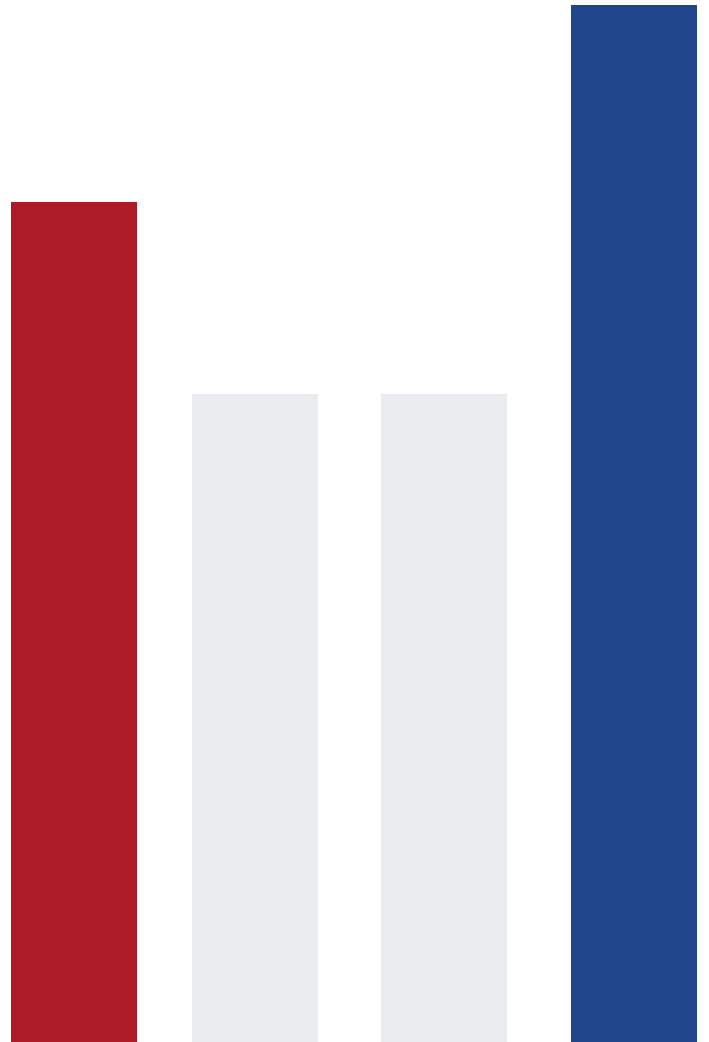
Consumers are demanding more immersive and more realistic experiences, with strong technological and experiential integration.

- They are looking for operators who demonstrate meaningful sustainability, with real eco-friendly policies and practices.

- The whole world is changing economically and demographically, with steady growth in both the number of people wanting new experiences and able to afford them, and the places they're coming from and going to.
- You're not the only game in town anymore: The landscape for theme park development is growing increasingly competitive, meaning you need to look (and build) forward to attract and retain visitors.

### Innovate to captivate

The competitive nature of the industry demands innovation. Success is no longer limited to ride quality, you need to bring much more: operators must now prioritize guest experiences, operational efficiencies, and strategies that drive engagement across diverse visitor demographics. Want to stay ahead of the game, and provide whatever the market is craving? Here are a few of the major trends in our industry that are (or should be) driving development plans for 2025 and beyond.





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## TREND #1

# Augmented and Virtual Reality are real

Guests want to be immersed, captivated, and transported, and AR and VR (AR/VR) technologies are getting them closer, transforming the theme park landscape. Some examples of this tech include interactive AR scavenger hunts, virtual reality roller coasters, and holographic meet-and-greets with characters.

With more than 95% of Americans expressing interest in AR/VR experiences, you need to be looking at reality in a different way if you want to stay competitive.

### AR/VR + IP = success

Theme parks such as Universal Studios have proven the effectiveness of combining AR technology with with strong Intellectual Property (IP). Attractions such as Mario Kart: Bowser's Challenge at Universal Studios Hollywood, Japan and later at Orlando's Epic parks (*pictured above right*) weave AR technologies into rides to make them interactive and game-like, catering to younger generations familiar with on-demand, participatory experiences. While these technologies improve re-ride value, they also represent an avenue for creating agency-driven guest experiences, offering a blend of gaming and narrative storytelling in physical spaces.

### Virtual spaces are real places

The rapid growth of affordable augmented and virtual reality (AR/VR) technologies, combined with the cultural shifts brought about by the pandemic, has accelerated the integration and acceptance of digital platforms as meaningful spaces for human interaction.



*Mario Kart Bowser Challenge at Universal Studios Hollywood*

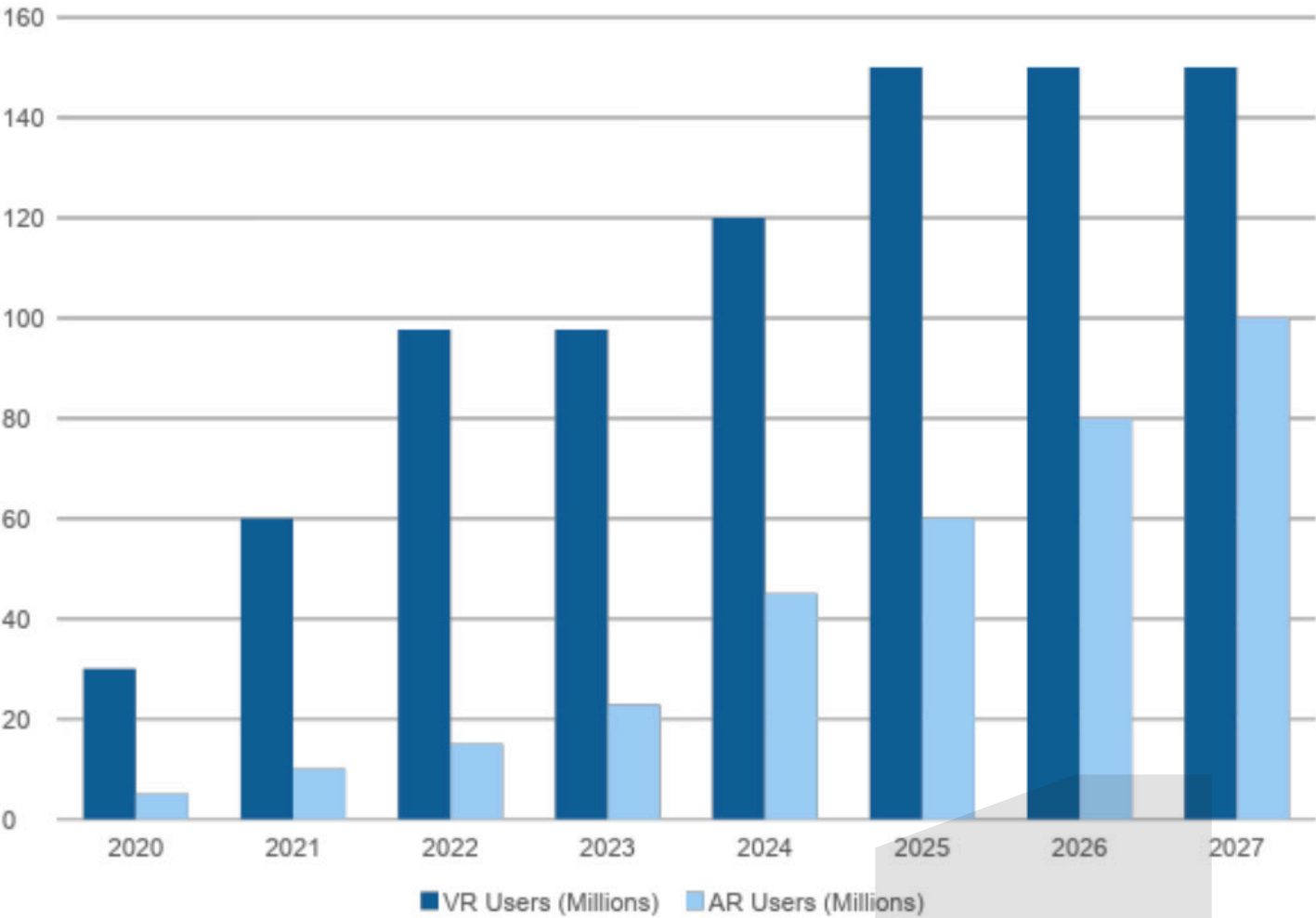
Advances in cloud computing have also solved some of the early problems faced by virtual spaces, such as "Second Life" making these types of virtual environments more accessible and practical than ever before.

Ironically, the recent pandemic underscored the importance of fostering personal and authentic connections, leading to a renewed focus on blending virtual tools with real-world interactions to meet this growing demand. Lead with story, not tech. While AR/VR offers exciting potential, it is critical to understand that these technologies alone cannot guarantee success. A strong component of any attraction remains the story you're telling or the intellectual property (IP) you're leveraging. Without compelling narratives or engaging IPs, even the most technologically advanced attractions risk falling flat: The technology must always be in service of the experience.



TREND #1

Augmented and Virtual Reality are real



Source: Statista Market Insights (2023)







## TREND #2

# Adventure tourism: Not just for thrill-seekers

Adventure tourism represents a burgeoning market with immense potential for theme parks globally. Increasing consumer demand for outdoor and exploratory activities, particularly those emphasizing sustainability and immersive experiences, is reshaping the industry landscape.

### **Adventures cross from thrill-seekers to families**

Adventure tourism has long been synonymous with high-energy activities such as zip-lining, high ropes courses, and climbing walls. These attractions continue to cater to thrill-seekers, promoting physical activity and exploration.

### **The birds and the bees, the flowers and the trees**

However, a rising interest in “soft adventure” tourism—activities such as birdwatching, hiking, and wildlife observation—has opened the sector to families and older travellers. For theme parks, integrating both high-energy and soft-adventure zones allows for a diversified offering that appeals to a broader audience..

### **Sustainable adventure, environmental education**

Adventure tourism provides a unique platform for promoting environmental stewardship. By embedding conservation themes within eco-adventure zones, theme parks can educate visitors on biodiversity while offering memorable experiences. These initiatives not only align with growing consumer interest in sustainable travel but also enhance the perceived value of the attraction.



*Horse riding excursion provided to Disney Cruise guests.*

For example, integrating interactive wildlife exhibits or eco-friendly glamping experiences within park designs can draw eco-conscious travellers. Such efforts resonate strongly with the 57% of travellers who report greater interest in visiting new destinations compared to five years ago, according to Tourism Economics, an Oxford Economics company.



### Take me somewhere new...

Travelers are increasingly drawn to remote and tranquil locations, embracing the “Missing Out” (FOMO) trend. Adventure-based attractions that reflect these unique environments can capitalize on this movement by offering wilderness-inspired attractions such as treetop walks, glamping accommodations, or even eco-resorts.

### ...and give me a unique and immersive experience

Parks and luxury destinations are particularly well-positioned to benefit from this trend. For instance, Disney's Animal Kingdom has seamlessly combined adventure tourism with a compelling environmental narrative since its opening in 1998. Attractions like the Kilimanjaro Safari are complemented by the park's significant contributions to global conservation efforts.

Similarly, properties such as the 5-star ultra-luxe Shinta Mani Wild in the Cambodian jungle elevate the adventure experience by offering unique and immersive opportunities. These include arriving at the lodge via zipline, participating in foraging and cooking their own meals, and joining anti-poaching patrols. By blending adventure with exclusivity and a deep connection to nature, these destinations create transformative experiences that resonate with discerning travellers.



*Guests arriving by zipline at Shinta Mani Wild.*

### The numbers don't lie

Tourism Economics, a subsidiary of Oxford Economics, highlights several key statistics supporting the rise of adventure tourism:

- 29% of travellers report increased interest in adventure travel.
- 34% of consumers express a growing interest in rural and nature-based tourism.
- 57% of travellers are more interested in visiting new destinations compared to five years ago.



## TREND #3

# Sustainability is not a “nice to have”

Sustainability is no longer a peripheral concern—it is central to the operations and strategic goals of modern theme parks. According to Booking.com’s 2023 Sustainable Travel Report, **83% of travellers prioritize sustainable travel.**

You need to adopt eco-friendly practices. From renewable energy integration to the use of recycled materials and attractions that educate visitors on climate change, sustainability efforts are reshaping the industry.

### Leave only footprints

The increasing consumer focus on sustainability is driving demand for meaningful and authentic travel experiences. Booking.com’s 2024 Sustainable Travel Report reveals that **71% of travellers aim to leave destinations better than they found them.**



500,000 solar panels form a “hidden Mickey” at Walt Disney World.

This sentiment reflects a broader trend in sustainable tourism, where travellers actively seek destinations and attractions that contribute positively to local communities and the environment.

You have an opportunity to leverage this demand by embedding sustainability into your core operations and guest experiences.

Initiatives such as MAKE TRAVEL MATTER® Experiences by TTC highlight how parks can offer unique, sustainability-focused activities that align with global environmental, social, and economic goals.

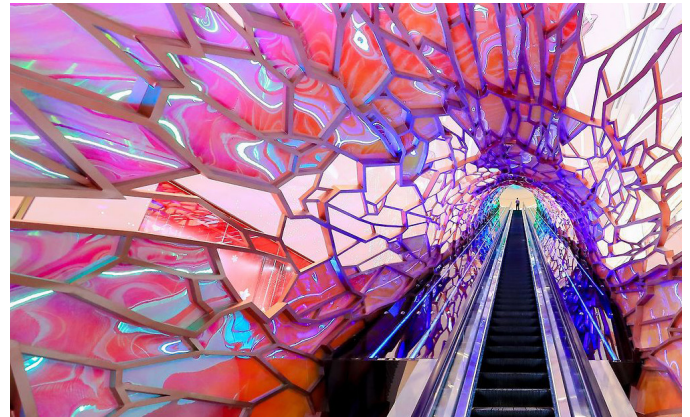
These initiatives create a dual impact: enhancing the visitor experience while generating measurable environmental benefits.

## Here's who is leading the way

Several industry leaders have set benchmarks for sustainable innovation:

- **Efteling and Vekoma:** Efteling, in collaboration with Vekoma, has taken a pioneering approach to sustainability by unveiling a concept for a sustainable roller coaster. Presented during IAAPA's Sustainability Day, this innovation emphasizes energy-efficient design and the use of eco-friendly materials, setting a new standard for attractions that align with environmental objectives.
- **Disney World:** Walt Disney World has integrated renewable energy solutions, including large-scale solar farms, which now generate nearly half of the park's energy needs. These efforts are complemented by waste reduction initiatives and educational programs that inspire guests to adopt sustainable practices.
- **Liseberg:** The Swedish theme park has adopted a comprehensive sustainability framework focusing on renewable energy, waste reduction, and biodiversity protection. Through initiatives such as carbon-neutral attractions and habitat conservation projects, Liseberg exemplifies how sustainability can be woven into park operations and guest engagement.

- **Aura in China:** Interactive installations, such as the "Tree of Light" found in Aura's mall- attraction hybrid, showcase how technology can merge sustainability and guest engagement. These exhibits educate visitors about themes like biodiversity, human nature and harmony while delivering a unique sensory experience.



*Aura: The Forest at the Edge of the Sky" Atrium Installation, Haikou International Duty-Free Shopping Complex.*



## TREND #4

# Experience the Experience Economy

Consumers are increasingly spending on experiences over material goods. According to a 2024 report by McKinsey Company, **88% of travellers** planned to spend the same or more on experiential offerings. This trend highlights the continued demand for story-driven attractions, interactive experiences, and multi-day visits into 2025.

### Immerse yourself in immersion

Guests want to have memorable fun, and crave joy, excitement, and deeply engaging entertainment above all else. Immersive environments have become a pillar of modern theme park design and are quickly becoming a staple. You might say that you can't swing a holographic cat without hitting an immersive environment these days.

### There's immersive, and then there's just damp

Of course, not all "immersive" experiences are the same, and the buzzword nature of the term sometimes results in overuse, and dilution and confusion in the market. You may recall Willy's Chocolate Experience, an "immersive" experience offered in 2024 that went viral for all the wrong reasons.



Successful and compelling immersive experiences stand out by evoking authentic emotions through meticulously crafted environments, often leveraging well-known IPs.



*Zootopia Land at Shanghai Disneyland.*

Notable examples include the Harry Potter and Nintendo Lands at Universal Studios, the newly opened Zootopia land at Shanghai Disneyland (*pictured above*), the hauntingly captivating Danse Macabre at Efteling, and the uniquely intimate Ghibli Park in Japan.

These attractions excel not only in their design but also in their ability to create emotional connections with visitors, whether through nostalgia, awe, or sheer delight.

Each example demonstrates the potential of blending storytelling with physical environments, ensuring guests feel they are part of a living narrative.

The scale of these projects varies, from grand themed lands to smaller, specialized attractions, yet their impact remains profound.

By focusing on detail, narrative coherence, and the strategic use of IPs, these spaces transcend mere entertainment, offering guests a sense of belonging and wonder that lingers long after the visit.

### Humans are critical in virtual worlds

In an era where guests increasingly rely on screens and digital interactions, human connections have gained new significance, and while virtual environments and immersive experiences are important, the quality of interaction between guests and frontline staff will continue to play a pivotal role in shaping the overall experience.

Meaningful interactions between guests and staff can provide a sense of personalization, warmth, and engagement that technology cannot replicate

Successful operators prioritize the recruitment, training, and ongoing development of skilled and charismatic team members to deliver exceptional service that resonates on a deeper level.

### Theme park, take me away!

Despite what some global brands may have us believe, your guests are not seeking a homogenized experience that could occur anywhere.

They value experiences that connect them to the unique identity of a destination.

They crave attractions that celebrate local culture and heritage, and memorable journeys filled with stories that resonate deeply, offering something distinctive and irreplaceable.

When you emphasize authenticity and a sense of place, you can foster a connection that goes beyond the superficial, ensuring an experience that remains vivid in the memories of your guests.

### Don't just meet expectations, blow them away

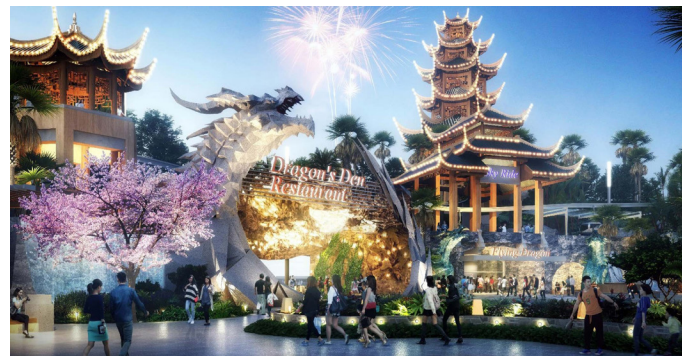
Any experience can be quickly spoiled by...a bad experience. Clear communication and exceeding guest expectations are the hallmarks of great operators, even when something goes slightly amiss. Ensuring transparency while surprising guests with thoughtful enhancements fosters loyalty and positive word-of-mouth.

### Let them know they're in the best hands

The best guest experience relies on them feeling secure and well-guided throughout their entire journey. This confidence is built not just through interactions with staff but also through how the park operates, feels, and looks.

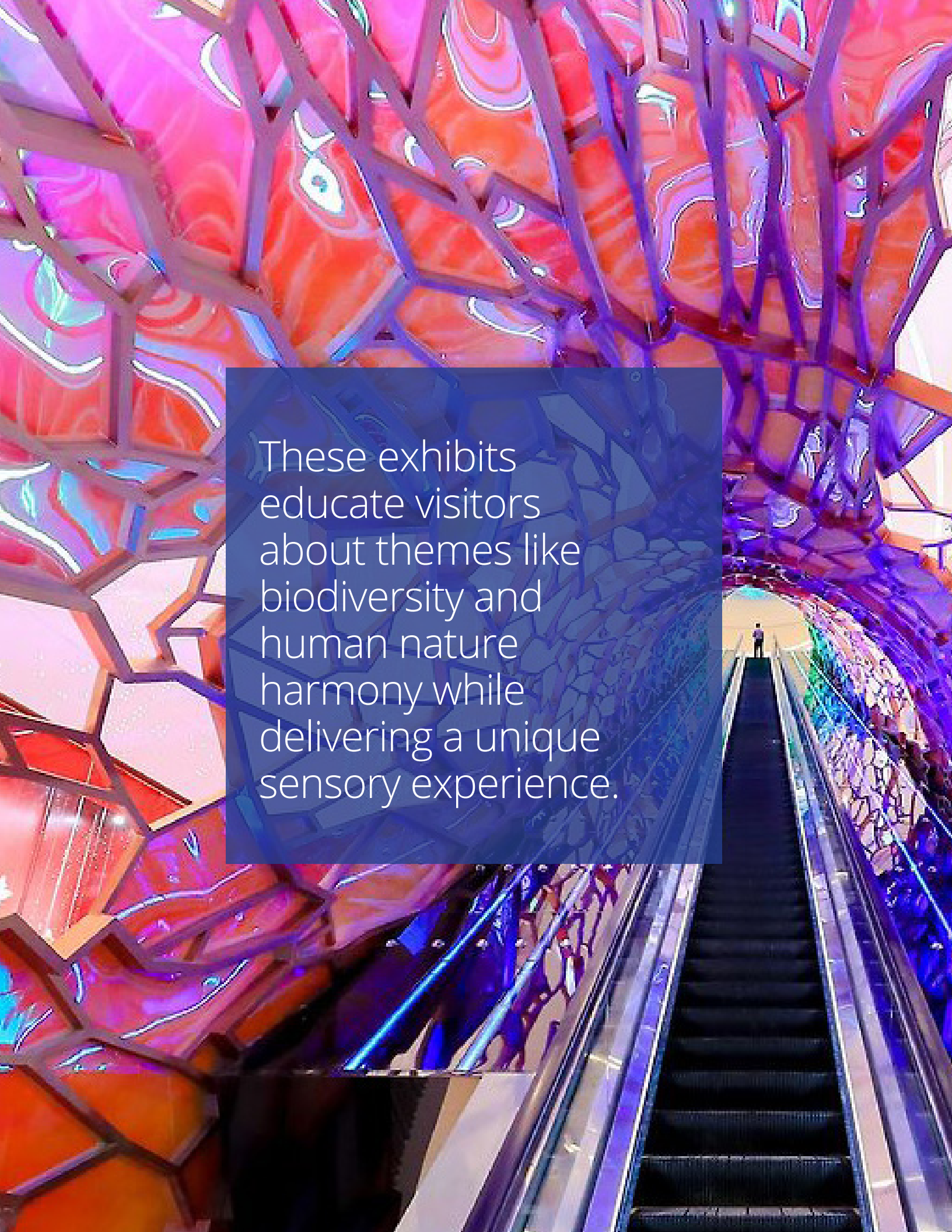
A well-organized operation ensures smooth processes and minimizes stress for your visitors. The atmosphere of safety and fun, supported by visible leadership and proactive management, reassures guests throughout their visit.

Additionally, a focus on safety, maintenance, cleanliness, and overall presentation reflects the care and pride you take in your venue. Instilling confidence at every touchpoint ensures that your visitors feel cared for, valued, and safe.



*Dream East Cultural Village in Wuxi, China*



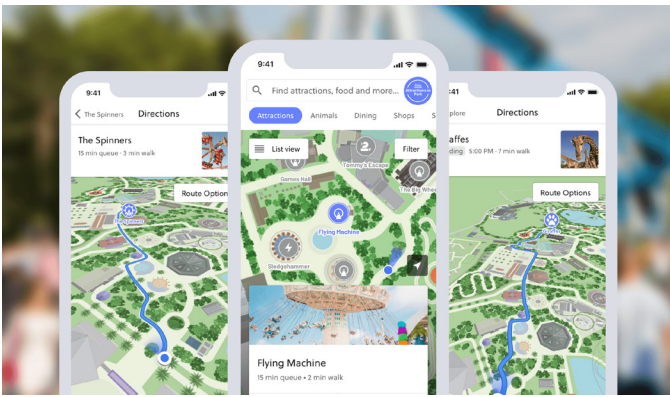


These exhibits educate visitors about themes like biodiversity and human nature harmony while delivering a unique sensory experience.

## TREND #5

# Technology and personalization

Advanced technology is table-stakes for consumers these days, and personalization in just about everything they do is a key value for them. Theme parks are no exception and are, in fact, a kind of extension of the virtual worlds their visitors play (and live) in every day. Expectations are high.



App-based planning (such as attractions.io) enhances guest experiences.

### AI, AI, oh!

Advanced mobile apps now allow visitors to plan their day with real-time updates on wait times, crowd levels, and ride recommendations, with artificial intelligence (AI) playing a crucial role in enabling these tailored experiences. AI-powered algorithms analyse visitor data to suggest itineraries that suit individual preferences while optimizing operations.

Parks such as Disneyland and Universal Studios have implemented AI-enabled systems that personalize dining recommendations and offer interactive games tailored to guest demographics, along with much

more. These innovations not only improve operational efficiency but also enhance the visitor experience by creating a seamless journey.

### Let guest satisfaction drive profits

Personalization and technology should be seen as tools to naturally drive profitability through higher guest satisfaction and ease, rather than simply as revenue-generating opportunities.

By reducing time spent in queues and freeing up time for guests to engage with attractions, dining, and retail, these technologies boost guest spending without adding friction.

Systems like MyMagic+, Lightning Lane, and Genie+ at Walt Disney World have demonstrated mixed outcomes. While they improve revenue streams, their impact on the overall guest experience underscores the need to balance revenue optimization with genuine guest satisfaction.





## TREND #6

# The middle class is coming, and from new places

The global middle class is projected to grow significantly, with emerging markets such as Asia-Pacific and Latin America showing tremendous potential for theme park development. As disposable income rises, families in these regions are seeking affordable entertainment options. Regional theme parks that cater to these audiences are becoming increasingly popular.

### The grass is green in new regional markets

This growth in the middle class represents a transformative opportunity for the theme park industry. Families in emerging markets are increasingly prioritizing leisure activities, often seeing visits to theme parks as a form of family bonding and a desirable way to spend their discretionary income.

Unlike established markets in North America and Europe, where theme parks often compete in a saturated environment, emerging markets offer the potential for growth and first-mover advantage. This has led to a rise in regional parks designed to meet the needs and expectations of these new audiences.



*Surendrapuri, the World of Mythological Wonders.*

### When everybody's welcome, everybody wins

Parks in emerging markets must strike a balance between affordability and quality. Pricing models should reflect the income diversity within these regions, ensuring that parks remain accessible to a wide range of visitors. Tiered pricing models, offering different levels of access and experiences, are becoming increasingly effective.

Additionally, emerging markets don't know what they don't know, and so marketing for parks in those areas needs to include educational components, to ensure potential visitors understand the value and the promised experience.

Disneyland's famous ticket books, used from its 1955 opening until June 1982, provide an early example of tiered pricing. These books offered A through E tickets, with E tickets granting access to the park's premier attractions.

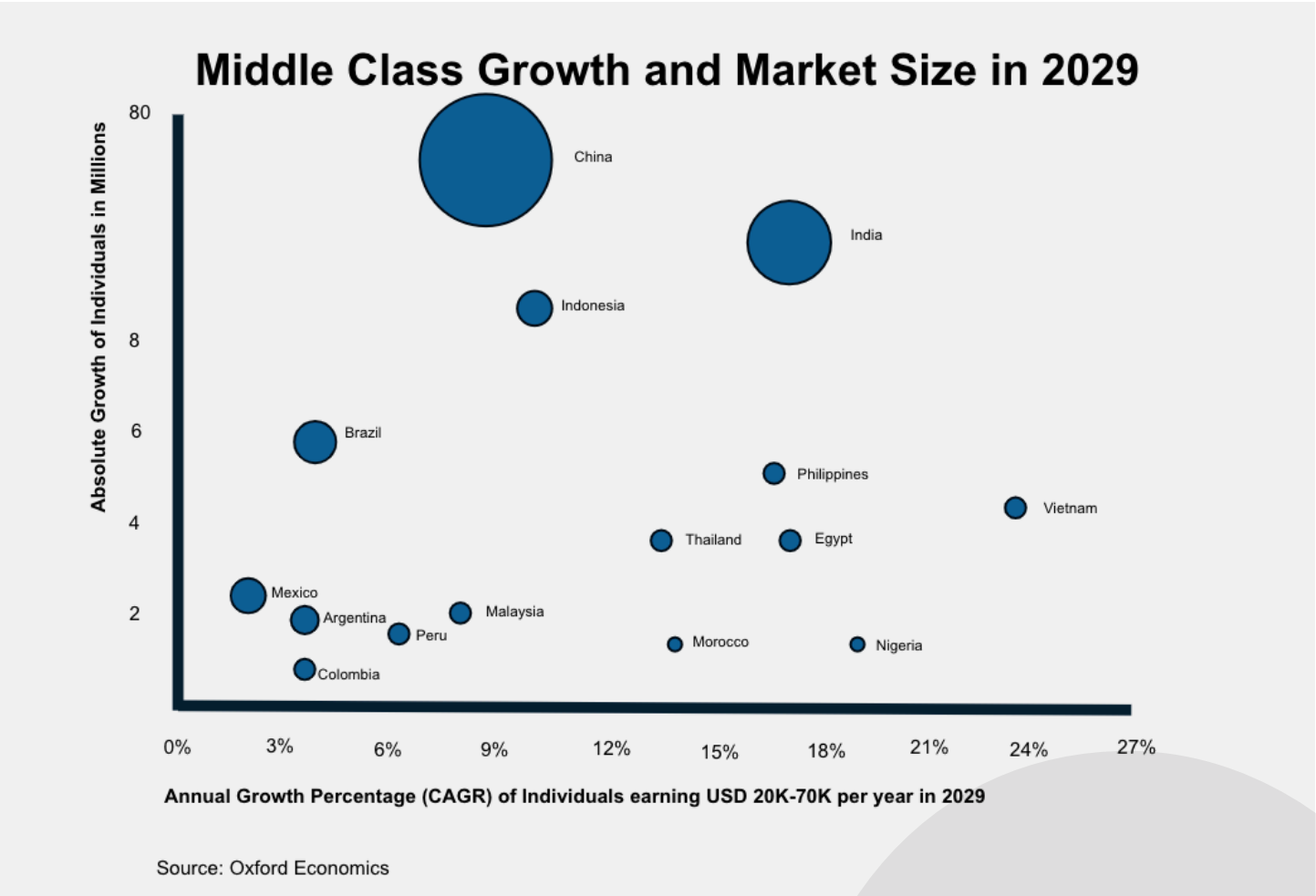
Parks today can adopt similar strategies by offering basic admission for general access while providing premium packages for rides, experiences, or services. Such strategies not only make the parks more accessible but also allow you to maximize revenue across different income groups.

### Planning + phasing = success

Investments in theme parks are typically high, often exceeding USD 150 million. Given the emerging income levels in these markets, it is essential to carefully balance the size and scale of the park with the financial realities of the target audience.

TREND #6

The middle class is coming, and from new places









## TREND #7

# Wellness, relaxation, and the art of theme parks

Wellness tourism continues to grow – people want to feel better both physically and mentally, and they're willing to go places and pay for it – and theme parks have a powerful opportunity to incorporate features that foster relaxation and well-being.

### Give them a break

Wellness-themed zones, spas, and nature trails offer a reprieve for visitors looking to step away from high-energy attractions, aligning with the global shift toward prioritizing health and balance in travel.

Booking.com's 2024 report highlights that 65% of travellers are interested in wellness-focused experiences, emphasizing the need for offerings that support both mental and physical well-being.

### Keep calm and park on

Parks can embrace this trend by creating spaces for mindfulness and rejuvenation, such as early-morning yoga classes in serene, natural settings, sensory gardens with calming elements, and healthy dining options that enhance the overall experience.

Adding wellness components diversifies park activities and enhances guest satisfaction by addressing the needs of all generations. Parents and grandparents can relax with spa treatments or meditation areas, while children and grandchildren engage with more active attractions elsewhere. For some, wellness might also mean enjoying beautifully landscaped gardens, scenic trails, or tranquil spaces with panoramic views.

This thoughtful balance ensures that every visitor, regardless of age, finds value in their experience.

### Wellness is good business

By integrating wellness into their offerings, parks expand their appeal, meeting the expectations of today's travellers while fostering an atmosphere of rejuvenation and enjoyment. These features not only enrich the visitor experience but also help parks remain competitive in a rapidly evolving industry.



*Private wellness suite, Rulantica.*



## TREND #8

# The Rise of Slow Travel

Everything happens too fast, don't you think? That's where Slow Travel comes in, emerging as an ironically fast-growing trend.

Emphasizing cultural immersion, meaningful connections, and sustainability, this approach encourages travellers to spend more time truly experiencing a destination, valuing quality over a packed itinerary. Rather than rushing through crowded tourist hotspots, Slow Travel focuses on savouring moments, engaging with locals, and exploring off-the-beaten-path destinations.



*Taking it slow.*

### Keep it slow, keep it real

The desire for authentic and local experiences is driving this trend. A survey by Hilton Hotels reveals that 74% of travellers prefer local recommendations, while 73% seek culturally immersive activities with their families. Additionally, 65% of parents prioritize introducing their children to their cultural heritage during trips.

Slow Travel also highlights the importance of journey-oriented experiences, such as scenic rail rides, hiking, cycling, and tranquil river cruises. These slower, more intimate modes of travel allow for relaxation, unhurried exploration, and a deeper connection to the destination.

### Give them space to slow down

For theme parks, this philosophy could inspire smaller, more serene park designs that focus on storytelling and connection. Parks could reduce the perception of overcrowding and minimize rigid planning by creating spaces that encourage visitors to linger, explore, and immerse themselves at their own pace.



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