Foreword

Welcome to IAAPA Europe’s manifesto. We want to give policymakers a clear idea about what matters to our industry. On the following pages you will find information on what our sector needs to make an even greater contribution to European tourism.

This matters because behind the fun and escapism of a day spent at an amusement park or attraction are some hard economic facts and figures:

- 149 million guest visits per year in Europe
- 53,100 full-time employee equivalents in the EU
- €10 billion direct and indirect economic impact
- €1.2 billion paid in direct and indirect taxation.

We’re also a sector that is capital intensive; we need to invest in new and existing rides to keep guests coming back to our parks and attractions. This rate of investment has not reduced even during difficult economic times. Very often this investment stays within Europe as most suppliers of new rides are based here.

In fact it’s often overlooked that our sector and its associated supply chain has a long and proud European heritage. My own park, Liseberg, opened its doors to visitors at the heart of Gothenburg in 1923 and across the border Tivoli Gardens in Copenhagen opened in 1843. Europa-Park in Germany, the second largest amusement park in Europe, is owned and managed by a family that has been in the business of amusement park rides since the 18th century. There are many more stories like this in our industry, which underlines the deep roots that our sector has in Europe.

Europe also boasts incredible diversity. Our sector ranges from world class destination parks like Disneyland Paris to small and medium-sized theme or amusement parks, attractions, water parks and family entertainment centres. Collectively they constitute a thriving European industry.

IAAPA Europe is publishing this document to help stimulate constructive engagement. We invite policymakers and other stakeholders to start a conversation with us about our sector.

Welcome to our world!

Andreas Andersen
European Advisory Committee Chairman
Director, CEO and President of Liseberg
Sweden
European Facts and Figures

How many parks are there in Europe and how many people visit them?

307 theme and amusement parks.
149.5 million visitors in 2012.

How much revenue do theme and amusement parks generate?

€4.9 bn attributable to money spent in parks.
80% in revenue.
16% to hotels.
4% to sponsorships, corporate events and other revenue streams.

How many people do they employ?

53,100 full-time equivalents.
€1.5 bn in direct wages per year.

How much do they invest in capital expenditure?

€587m invested in capital expenditure.
€558m spent in the EU.

How do they help to attract tourists to Europe?

€265m spent on marketing which is 6% of industry revenues.

What’s the total economic impact?

10 billion direct and indirect economic impact.

How do theme and amusement parks contribute to public finances?

€1.2bn Contribution in terms of VAT, business rates, as well as corporation and employment taxes.

All figures based on IAAPA Europe’s Economic Impact Study which uses the latest available industry data.
IAAPA Europe - member associations

AEPA - Asociación Española de Parques de Atracciones y Temáticos (Spanish Amusement and Theme Parks’ Association)
AFEMO - Spanish Amusement Suppliers’ Association
ANCASVI - Associazione Nazionale Costruttori Attrezzature Spettacoli Viaggianti (Italian Amusement Suppliers’ Association)
ANESV - Associazione Nazionale Esercenti Spettacoli Viaggianti e Parchi (Italian Parks’ and Showmen’s Association)
BALPPA - British Association of Leisure Parks, Piers and Attractions
BARM - Benelux Amusement Ride Manufacturers’ Association
BELGOPARKS - Belgian Association of Amusement Parks
BOVAK - Dutch Showmen’s Union
CLUB van ELF - Dutch Association of Leading Visitor Attractions

FFD - Foreningen af Forlystelsesparker i Danmark (Danish Association of Amusement Parks)
EAASI - European Association of Amusement Supplier Industry
EWA - European Waterpark Association
FPA - Finnish Parks’ Association
Horeca KHN - Dutch Hotel and Restaurant Association
RAAPA - Russian Association of Amusement Parks and Attractions
RECRON - Association of Dutch Leisure Entrepreneurs
SAPIR - Russian Union of Associations and Partners of the Amusement Industry
SNELAC - Syndicat National des Espaces de Loisirs, d’Attractions et Culturels (French Association of Amusement Parks and Cultural Attractions)
SNF - Svenska Nöjesparksföreningen (Swedish Amusement Parks’ Association)
TEA - Themed Entertainment Association
ToerNed - Association of Dutch Tourist Attractions
VDFU - Verband Deutscher Freizeitparks und Freizeitunternehmen E.V. (Association of German Amusement Parks)
VDH - Verband Deutscher Hallenspielplätze (German Association of Indoor Playgrounds)
VDV - Verband Deutscher Vergnügsanlagenhersteller (German Association of Amusement Machinery and Accessory Manufacturers)
WWA - World Waterpark Association
Safety: Our Number One Priority

Guests’ and employees’ safety is paramount to our industry - owners, operators and suppliers alike.

In fact, visiting an amusement park is one of the safest forms of recreation available to the public.

Industry safety performance is monitored regularly by IAAPA Europe’s European Ride Safety Reporting System which collects ride incident data.

Our latest data shows that there were close to 150 million visits to parks during 2012 and more than one billion rides were taken. Meanwhile, the risk of being injured at a park is one in three million. This makes a visit to one of our members as safe as playing basketball or taking a bike ride.

We want to maintain and wherever possible improve this safety record. For this reason the attractions industry took a leading role in developing the first ever European standard on amusement park safety: EN 13814 Fairground and Amusement Park Machinery and Structures, which complements national legislation and certification schemes across the EU. It was published in 2004 and has been adopted by the industry.

EN 13814 specifies the minimum requirements necessary to ensure the safe design, calculation, manufacture, installation, maintenance, operation, examination and testing of both temporary and permanent amusement devices. Parallel standards cover water parks and playground structures.

The complexity of rides has evolved considerably since 2004. Today industry best practice exceeds the minimum requirements of EN13814 by a considerable degree.

Disneyland Paris: safety first!

Disneyland Paris takes a rigorous approach to safety with more than 1.5 million visitors per year.

Safety starts with design. Rides are manufactured by experienced engineers. The production process is quality controlled and the final installation is tested and inspected by local control officers before operation can begin. Throughout a ride’s life it is thoroughly maintained taking into account regulatory obligations, relevant risk assessment and industry best practice related to prevention.

Aside from the physical maintenance of rides, parks like Disneyland Paris have to control the human factor by communicating access conditions and risks and integrating the specific needs of disabled guests. They also need to be able to deal with and anticipate inappropriate behaviour, which can often be the primary reason for accidents. They also plan for the unexpected, like emergency situations and exceptional climatic conditions, which can have an impact on the safety of guests.

All of this needs to be applied on a consistent basis and evolve to keep pace with new technology and ride innovation. Operating procedures and staff training programmes need to be constantly reviewed and updated.

A thorough audit programme is in place to ensure that prevention standards are comprehensively applied.

What we want from policymakers

• An update of the EN13814 standard to reflect technological developments in the industry.
Fair and Equitable Value
Added TAX (VAT)

Many Member States currently apply a reduced rate of VAT to parks and attractions.

Where those rates are applied, we believe that they should remain and policymakers should avoid significant adjustments from reduced rates to a high standard rate.

Amusement parks and attractions are labour intensive, meaning that an increase in the number of visitors will feed through into increased employment relatively quickly.

Between 2007 and 2013 the standard rate of VAT increased from 19.5 percent to 21.2 percent (or 8.7 percent) whereas the average rate applying to amusement parks increased from 12.7 percent to 15.3 percent (20.4 percent).

It’s often very difficult, if not impossible, for parks to pass on these increases to price conscious consumers. Parks operate in a very competitive environment with very little scope to adjust pricing. Increases in VAT have to therefore be absorbed, which may actually have the effect of reducing the overall tax take by:

- Causing prices to rise and therefore reducing demand.
- Causing parks to absorb the higher taxes reducing cash flow for new investment or staff.

In fact, where parks do absorb the cost it has a depressing effect on jobs. By contrast, lower rates not only stimulate investment and job creation they have other indirect benefits, including:

- Gains in income and corporation tax receipts.
- Increased turnover and therefore VAT.
- Savings on unemployment benefit payments.

What we want from policymakers

- Reduced rates of VAT for parks and attractions to be retained and applied more broadly to derive the economic benefits set out above.
- Greater application of reduced rates to tourist accommodation services and restaurants/catering.
Fair Competition Between Public and Private Sector Attractions

Many of IAAPA’s members operating on a commercial basis find themselves in competition with public-sector attractions receiving financial support from public authorities.

This support could be a contribution towards operating costs (especially where attractions serve cultural objectives) or a contribution towards the initial investment. EU funding has also been widely used to support the development of new attractions in areas undergoing economic regeneration.

Publicly funded development of attractions has often been based on poor feasibility studies. As a result, some of the attractions supported have either failed or needed further public support to keep going. They have caused distortion in the local market and put existing commercial attractions in the area at a severe competitive disadvantage.

The importance of supporting economic regeneration with public funds is clear, but where the development of new visitor attractions is to be supported, the decision should be supported by a feasibility study based on a sound understanding of local capacity and market potential.

What we want from policymakers

- Measures to ensure that public subsidies to the development of new attractions do not distort competition with existing commercial attractions.
- Guidelines for the allocation of EU funding should be drafted accordingly, and include requirements for sound feasibility studies.
- Free or subsidised entry to new publicly funded attractions should be offered only where it does not have a negative impact on existing commercially operated attractions.
European Tourism Policy That Supports Competitiveness

IAAPA Europe fully supports the policy objectives set out in the European Commission’s 2010 communication ‘Europe, the world’s no. 1 tourist destination - a new political framework for tourism in Europe’. These objectives are to:

- Stimulate competitiveness in the European tourism sector.
- Promote the development of sustainable, responsible and high-quality tourism.
- Consolidate the image and profile of Europe.
- Proactively monitor EU policies with an impact on tourism.

Four years on from the publication of this document, while progress has been made, more work is necessary to ensure that these objectives are fully realised.

There needs to be a stronger emphasis on working in partnership with industry and a greater understanding of businesses’ concerns in the development of EU tourism policy.

We need a business environment which is supportive of the tourism sector. Priorities in this respect include:

- Easing barriers to visas for non-EU tourists.
- Improved European infrastructure.
- A competitive tax regime for businesses, in particular by moving taxation away from labour and using VAT to increase demand for tourism services.
- Deepening of the single market for services.

Efforts to mainstream tourism across policy areas must continue. Tourism is affected directly and indirectly by decisions in many different policy areas, ranging from taxation to consumer rights and visa policy. This must be recognised throughout the EU institutions and reflected in their activities.

While we value the EU’s role in supporting the promotion of the EU as a unique and high-quality destination, this needs to allow the opportunity for the diversity of Europe’s tourism offer to flourish. Key initiatives and promotional efforts should still be driven by tourism bodies in the Member States.

What we want from policymakers

- Mainstreaming of EU tourism policy across all policy areas. This is the best way to stimulate the sector’s competitiveness.
- Closer dialogue between the Commission and industry networks to develop, implement and promote EU tourism activities and initiatives.
- A competitive business environment for tourism through better infrastructure, competitive tax, easing access for third-country tourists and deepening the single market in services.
Skills and Employment Policy That Incentivises Job Creation

Our business is about creating memorable moments for our guests that will live with them forever. In the creation of these memories, our employees are key. Our industry continuously invests in our staff (53,100 across the EU) because they play a decisive role in the experience and safety of our guests.

As major employers we face certain challenges that need to be addressed to make the process of recruiting, retaining and training our staff as easy as possible. Specifically:

• Seasonality: Our industry is subject to regional demand. The majority of park staff are recruited for the summer period. These people are often young and low skilled, but working with us for a season gives them new skills that strengthen their value in the labour market. Access to a pool of flexible labour, which allows us to respond to peaks and troughs in demand, is an essential part of our business model.

• Labour availability: Difficulty in filling positions at nearly every level of park operations is a common problem in the sector. In terms of front line customer service staff it can be difficult to find candidates through local labour markets. Skilled staff like mechanics as well as electricians, plumbers and chefs, continue to be difficult to find and filling vacancies can require a long lead time.

Investing in people: Mirabilandia, Italy

Mirabilandia in Italy typically invests more than 9,000 hours in more than 326 staff in order to prepare for the opening of the season. This includes:

• 2,200 hours of safety training certified by a leading safety organisation like TUV, DNV, DTI or ATISAE. Each ride has a unique course module and staff are awarded with individual passports which certify which rides they are able to work on.
• 1,800 hours of sales and service training, which is measured through customer satisfaction surveys. Survey results are monitored daily and guests are encouraged to reward staff that offer high levels of customer service with a gold card.
• 3,200 hours of ‘smile training’, which helps staff to develop good hosting skills. This is essential to give Mirabilandia’s guests a memorable experience.

What we want from policymakers

• Flexible labour law that recognises the value of seasonal work.
• A tax regime which encourages employment by avoiding the over-taxation of labour and rewards employers who invest in training.

Tivoli Gardens, Copenhagen, Denmark
Approximately 80 million Europeans have disabilities, some 15 percent of the population. One in four Europeans has a family member with a disability. The business case for parks to be open and accessible is clear and with an ageing population this need is only going to increase. Parks and attractions realise this and are rising to the challenge.

Improving access is a win-win situation for amusement parks and attractions because when you improve accessibility for disabled guests, you improve accessibility for all guests.

However, it is important that improving access is driven by the industry and not just legislation, standards or labels. Only if the industry takes responsibility will lasting solutions be found.

There also needs to be a recognition that amusement parks and attractions represent a challenging environment in terms of accessibility. A typical park has a complex infrastructure to meet the requirements of a high volume of guests. Parks have to be built for the many and not for the few. In addition, accessibility has to be balanced with safety which can never be compromised.

Parks have tended to look at accessibility in the widest possible sense. Not everything can be solved by changing the physical environment. Much greater accessibility can be created through culture change so that accessibility is prioritised on the frontline and backstage.

Integrating accessibility: Liseberg, Sweden

Liseberg in Gothenburg, Sweden, is one of the largest amusement parks in Europe. Liseberg uses a step-by-step model to integrate accessibility into its operations.

This includes mapping challenges that the park’s environment may hold for several types of disability and communicating accessibility information to a wide audience to encourage visits from as broad a group of customers as possible. Facilitating access by specialist training of staff or free entry for companions of disabled guests as well as planning for accessibility by integrating necessary physical changes into the investment plan of the park are also important steps. Finally, Liseberg is then in a position to deliver change. For example, in 2016 Liseberg will open a new €2 million funicular as an alternative to steep walkways and escalators for less mobile guests.

This approach is making Liseberg a more accessible and welcoming environment, which is good for business.

What we want from policymakers

• Rules on accessibility that are framed with the industry in mind.
• Recognition that changing a business’s culture can be as valuable as changes to the physical environment.
Sustainability: A Business Opportunity, Not a Threat

There are strong incentives for parks and attractions to become more sustainable. In particular:

• Our customers increasingly expect us to be able to demonstrate that our services are delivered in a sustainable way.
• Parks are often intensive users of resources. Policies and processes that help parks to manage them more effectively to deliver real cost reductions are very attractive.
• Parks and attractions are often intimately linked to the communities in which they are located giving them a strong sense of social responsibility. For example, city parks like Tivoli in Copenhagen or Liseberg in Gothenburg are positioned at the very heart of their communities; major out-of-town attractions like Puy du Fou in France or Sarkanemi in Finland are closely identified with the region in which they are based. For this reason, parks and attractions feel a strong responsibility to ensure that they have a net positive contribution to the local community.

Of course while the business case is strong, becoming more sustainable is not without its challenges:

• Radical changes to energy supply or efficiency can be high on up-front investment but returns can take time to be realised.
• Parks attracting high visitor volumes may struggle to manage transport sustainably without the partnership of regional and local authorities.
• Access to help and information for parks that want to be more sustainable is variable.

The TÜV in Germany developed the first sustainability certification for amusement parks in collaboration with Europa-Park. This is a positive development which will help other parks to tackle sustainability in a way which is directly relevant for them and their operations.

Sustainability certification for amusement parks: Europa-Park, Germany

Europa-Park in Rust, Baden-Wuerttemberg, Germany became the world’s first green amusement park in 2013.

Europa-Park teamed up with TÜV SUD in Germany to develop a sustainability certification for parks. During a six month period the TÜV SUD assessed Europa-Park’s 94 hectare site, including 11 roller coasters and five themed hotels, to assess the park and its facilities against sustainability, energy efficiency and environmental compatibility criteria.

The park scored well in relation to renewable energy sources such as photovoltaic panels, heat pumps and hydropower as well as land use as the park has adapted its expansion needs to the natural environment.

What we want from policymakers

• Greater collaboration with local and regional authorities to manage important sustainability issues like transport more effectively.
• Promotion of targeted information and guidance for parks and attractions.

Hotel Colosseo, Europa-Park, Germany
Protecting Innovation and Supporting Hi-Tech Engineering

Parks and attractions are supplied by a network of Europe-based medium-sized hi-tech engineering companies specialised in the design and manufacture of amusement park rides.

The complexity and technological innovation in rides has increased dramatically in recent years. Today there are approximately 2,500 ride suppliers operating in Europe deriving approximately 60 percent of their revenues from trade with third countries. Although the supplier industry is undoubtedly a European success story, it does face challenges when trading within and outside the EU.

Within the EU, suppliers face considerable technical barriers to the certification of rides. This generates additional costs for ride suppliers who may need to obtain certifications several times over with varying requirements. This amounts to a costly barrier to trade.

Outside the EU, ride suppliers from Europe are penetrating developing markets with great success but there are limitations. The supplier industry is characterised by low volume but high value sales. Companies supplying rides need the security of knowing that the investments that they make to remain innovative are adequately protected through intellectual property law.

However, for those trading in a global market it can often be difficult to enforce intellectual property rights, particularly in emerging markets. While a framework of law invariably exists, companies operating in these markets often report an increasing number of IP infringements and a lack of recourse to allow them to enforce the laws.

In addition discriminatory behaviour from local technical certification bodies is a growing problem. Companies often fear that inspection regimes disadvantage European companies at the expense of local suppliers.

Exporting European engineering and Design across the world: Zamperla, Italy

Zamperla, based in Altavilla Vicentina (Vicenza, Italy) is a leading international amusement rides manufacturer.

With an annual revenue of approximately €60 millions, Zamperla currently employs 230 people in Europe, of which 52 highly skilled engineers.

The company is a one-stop-shop for theme and amusement parks providing support from earliest design concepts to finished product.

Through collaboration between dedicated technical teams specialised in prototypes, stress analysis, safety, design and production, Zamperla yearly establishes itself as a leader through the production of new and original avant-guard rides.

Founded in 1962, it expanded into the US market in the 70s and, in 1988, supplied Disneyland Paris with seven of their 12 new rides. In 2005 and 2006 the CEO, Alberto Zamperla, received two E&Y ‘Entrepreneur of the Year’ Awards as a finalist in the Innovation and Global award categories.

In addition to supplying the European market, the company is currently exporting to more than 120 nations and has operations in Russia, Belarus, Philippines, China and UAE employing globally, more than 420 people.

What we want from policymakers

- Steps to harmonise certification processes for ride equipment, ideally through a formalised process based on the existing CEN standard.
- Strong emphasis on IP protection and enforcement in trade-related discussions with third countries.

European ride suppliers displaying at the Euro Attractions Show 2013, Paris
About IAAPA

IAAPA, the International Association of Amusement Parks and Attractions, has been active in Europe since 2001. IAAPA Europe is its European division. It was established in 2008 and is based in Brussels. www.iaapa.org/europe

IAAPA Europe is the voice of the European amusement park and attractions industry with over 1,000 European members. Membership ranges from large corporate groups to smaller operators and suppliers. This diversity of membership is reflected in the board that oversees the association’s activities.

IAAPA Europe organises the Euro Attractions Show (EAS), the most important trade show and conference in the European attractions industry calendar. www.iaapa.org/EAS

IAAPA Europe is a member of NET, the Network of European private entrepreneurs in the Tourism sector.

Further information

For more information on this manifesto or other issues affecting tourism and the attractions industry in the EU, please contact:

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## Top 20 parks in Europe

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TEA/AECOM 2013 Theme Index & Museum Index: The Global Attractions Attendance Report