



IAAPA[®]

The Global Association
for the Attractions Industry

**2019
ANNUAL
REPORT**



DEAR IAAPA MEMBERS,

I am honored to share with you IAAPA's 2019 Annual Report, which highlights many of the outstanding accomplishments we had throughout the year. 2019 ushered in IAAPA's second century, and with it our new world headquarters in Orlando, Florida. I was excited by the significant growth in opportunities for our members to connect with colleagues through a newly revamped website and at events across the globe—building relationships and sparking ideas that spur innovation. In fact, the incredible attendance at all three of our global expos (which were newly rebranded) was a direct reflection of our members' desire to expand their reach in our association and industry. Collectively, this year's activities reflected the success and growth our industry experienced throughout the world.

I was also excited that 2019 saw the launch of the IAAPA Sustainability Task Force (now the IAAPA Sustainability Committee). This dedicated group of members is committed to helping our industry respond—and lead—in demonstrating to our visitors that our business practices are in alignment with their values around environmental stewardship. We also provided increased support in enhancing safety and security, a clear reflection of the increasing importance these issues have for all of us. Finally, on the political front, IAAPA once again proved to be a strong advocate for our members, helping governments understand the value and significance of our industry.

It goes without saying that this outstanding report is a direct result of our exceptional members—we're a volunteer-driven association (with tremendous support from a passionate and dedicated global staff). I find it remarkable to see how far our industry has come in the past year ... and century. Thanks to every IAAPA member and their commitment to continually striving to make the attractions industry even better, I have no doubt the coming century will bring even more innovative and wonderful things!

Enjoy,



David Rosenberg

2019 IAAPA Chairman of the Board



PURPOSE

We exist to connect the diverse and dynamic attractions industry, for the good of us all. Through this, we grow and improve our people, our companies, and our industry.

MISSION

We inspire, grow, and protect the global attractions industry through member connections.

IAAPA is the premier organizer of global attractions industry events and the facilitator of marketplace connections. Through this, we enable the success and competence of our members to deliver safe and memorable experiences to guests.

VISION

A diverse and dynamic association for the attractions industry with global reach and impact.

IAAPA will be an indispensable global resource for our members, an international authority for our industry, and a world-class workplace for our employees. IAAPA will have a significant presence in every region of the world, and in every part of the growing and diversifying attractions industry. Through this, IAAPA will support the long-term sustainability of members, their partners, and communities.

IAAPA'S CORE VALUES

- ▶ We treat others with respect.
- ▶ We operate with transparency.
- ▶ We are courageous and seek to innovate.
- ▶ We are inclusive and value collaboration.
- ▶ We are passionate about our industry and our work.

IAAPA celebrated the start of its second century in style. The 101-year-old association unveiled its new brand—the result of an intensively researched study—at IAAPA Expo 2018, and the vision came to life throughout 2019.



From the IAAPA Branding Project, the organization learned members most want *connection* from the organization. Connecting industry colleagues together leads to inspiration and growth, and we foster these vital moments through events like IAAPA Expos; IAAPA FEC Summit; IAAPA Leadership Summit; IAAPA Europe, Middle East, Africa (EMEA) Spring Summit; IAAPA Asia Pacific (APAC) Summit; IAAPA Latin American Summit; and the new Meet IAAPA. In addition, IAAPA strengthens these bonds through the comprehensive member directory and marketplace.

The association also underwent two other major upgrades in 2019.

FROM LEFT, ORANGE COUNTY MAYOR JERRY DEMINGS, DAVID ROSENBERG, AND HAL MCEVOY OPEN THE NEW HEADQUARTERS.



A NEW HEADQUARTERS

In June, IAAPA officially opened the doors of its new 22,000-square-foot global headquarters in Orlando, Florida. Located in the epicenter of the global attractions industry, the custom-built headquarters is designed to celebrate and support IAAPA members from around the world.



Located on 7 acres near the headwaters of the Florida Everglades, the office was designed to reflect the global attractions industry. The building's exterior features a unique wave pattern, representing the dynamic nature of the industry. Inside, dramatic artistic elements include varying ceiling heights and a colorful mural that depicts the diversity of IAAPA members around the world.



The thoroughly modern space also celebrates the industry's past with historic artifacts on display throughout and a digital interactive exhibit room where visitors can explore IAAPA's past and present.

Designed and built by IAAPA members for IAAPA members, the building includes exclusive meeting rooms, special event space, and workstations. The spacious patio features an outdoor kitchen and seating overlooking the natural landscape.



IAAPA employs more than 80 people worldwide, with close to 50 team members based in Orlando. The new building is home to the IAAPA North America regional office, as well as the association's global headquarters team.

The IAAPA Government Relations and Advocacy team in Alexandria, Virginia, also moved into a new office space after the successful sale of the former IAAPA headquarters location.



A NEW WEBSITE

IAAPA introduced a new website as well. The research and strategy process started in 2016 and incorporated feedback from members, including the IAAPA Board of Directors. The new IAAPA.org features numerous member benefits, including:

- **A more detailed membership directory:** Connect with fellow members using an advanced search function and easy-to-read results.
- **A centralized calendar:** This interactive calendar contains all IAAPA events from around the globe. Sort by region, date, or number of credit hours received for attending.
- **An easier way to find research and resources:** IAAPA members have access to world-class industry research and training/professional development resources specifically designed for attractions operators. The new Research and Resources page helps members quickly find the right tools for their team.
- **A more user-friendly webinar library:** A sleek new design makes it simple to learn with a wide selection of prerecorded webinars from industry experts.
- **A simplified way to add employees to rosters:** Designating who on a member company's team receives IAAPA benefits is easier than ever through the completely online process.
- **A new online home for Funworld:** Access and share the latest industry news and insights with Funworld's new homepage at IAAPA.org/Funworld.
- **A new guide for sustainability:** The updated IAAPA Facility Excellence Tool creates a smooth user experience and now features a special module to evaluate a facility's sustainability.

A look at the association's activities and accomplishments from the past year.

MEMBERSHIP INCREASES

IAAPA's membership continues to grow at a healthy rate, increasing 4% over last year. In particular, the Asia-Pacific region saw an 11% increase over 2018 numbers. Member services, educational and networking events, and certification have contributed to servicing a record number of members in the Asia-Pacific region.

GLOBAL MEMBERSHIP OVERVIEW

TOTAL MEMBERSHIP BY TYPE

	2019	2018	YOY +/-	% change
Facilities	2,495	2,454	41	2%
Manufacturers and Suppliers	2,880	2,831	49	2%
Individuals	226	192	34	18%
Students	747	650	97	15%
Total	6,348	6,127	221	4%

TOTAL MEMBERSHIP BY REGION

	2019	2018	YOY +/-	% change
Asia Pacific	704	633	71	11%
EMEA	1,564	1,516	48	3%
Latin America, Caribbean	443	417	26	6%
North America	3,637	3,561	76	2%
Total	6,348	6,127	221	4%

REGIONAL MEMBERSHIP OVERVIEW

ASIA PACIFIC

EMEA

LATIN AMERICA

NORTH AMERICA

	2019	2018	% change	2019	2018	% change	2019	2018	% change	2019	2018	% change
Facilities	198	193	3%	586	552	6%	357	349	2%	1,354	1,360	0%
Manufacturers and Suppliers	459	426	8%	784	764	3%	59	52	13%	1,578	1,589	-1%
Individuals	18	10	80%	25	22	14%	11	4	175%	172	156	10%
Students	29	4	625%	169	178	-5%	16	12	33%	533	456	17%
Total	704	633	11%	1,564	1,516	3%	443	417	6%	3,637	3,561	2%

IAAPA POSITIONS ITSELF TO EXCEED MEMBER EDUCATIONAL NEEDS FOR THE FUTURE

Working with a group of member subject matter experts and regional education managers, the Global Education team made great progress in the past year, including:

- Updating and refreshing the IAAPA Institute for Attractions Managers experience for the future.
- Preparing to relaunch IAAPA Institute for Executive Education at San Diego State University in January 2021.
- Completing the core competency framework project and full analysis of all educational activities and content available to members. The association will develop a road map that gives members the key to drive their own professional development. The competencies serve as directions that guide members toward an end goal for their career.

- Hosting 41 webinars in 2019, with more than 4,000 total registrants; topics included safety, operations, marketing, food and beverage, and more. IAAPA offered 15 webinars in Spanish and Portuguese—the most ever—servicing more than 1,000 members in the Latin America and Caribbean region.

Momentum for IAAPA's certification



programs continues to build. IAAPA has almost 400 certified professionals around the world, each demonstrating their competency, credibility, and commitment to the attractions industry by having earned an IAAPA designation. To support the continued growth, status, and stature of the global certification programs, the organization will continue to invest in the programs, starting with the hiring of a dedicated certification program manager in 2020.

- IAAPA Safety Institute was delivered virtually to 60 participants this fall as IAAPA's first virtual seminar. Based on the pilot program's success, plans are underway to expand virtual seminars to increase IAAPA's ability to deliver more quality education programs around the world.
- The Global Education and Member Services (GEMS) task force concluded its work in 2019. Formed in 2018, the task force explored how IAAPA can better engage and support members throughout the year. From the research and analysis, the task force has identified more than 50 recommendations designed to increase member acquisition, first-time users of IAAPA products and services, overall member engagement, and membership retention.

IAAPA E-NEWSLETTER

The IAAPA Member News monthly e-newsletter received a fresh new look. The e-newsletter gives members a timely snapshot of upcoming events, webinars, and connection opportunities, with a new format designed to appeal to the increasing number of members using their smartphones. Each issue also highlights an IAAPA member benefit as a reminder of the myriad IAAPA products and services that many members underutilize, from free access to valuable research reports to safety tools and more.



NEW SUSTAINABILITY COMMITTEE CREATED

The board of directors formed the IAAPA Sustainability Committee in September 2019 to guide IAAPA in matters related to the long-term sustainable management of the association. The committee also aims to create programs, products, and services that can inspire members to follow a global sustainability agenda, as defined by the United Nations Sustainable Development Goals.

IAAPA BYLAWS AND POLICIES

The IAAPA Governance Committee reviewed all the IAAPA bylaws and policies, rearranged the policies so members could easily find information, and added policies for subcommittees. Adding policies for subcommittees will help subcommittee members better understand their role in the bigger picture.

IAAPA FOUNDATION REFOCUSSES MISSION

The IAAPA Foundation has refocused its mission to award scholarships to students pursuing a career in the attractions industry. Over the next year, the Foundation will continue to evaluate ways to expand the scholarship program to other students around the world. The IAAPA Global Education Committee, in partnership with the Foundation Transition Task Force, is evaluating all of the Foundation's activities. The outcome of the collaboration will identify which activities will be continued or reimaged in support of IAAPA's strategic plan.

NEW TEAM MEMBERS AND ENGAGEMENT SURVEY RESULTS

IAAPA conducted a team member engagement survey. The engagement rate was high, and the scores were strong. Now at 82 team members, the association continues to recruit and hire top talent to assist members around the world.



THREE SUCCESSFUL EXPOS IN 2019



(formerly IAAPA Attractions Expo)
Orlando, Florida, United States

- 42,200 registered attendees
- 27,900 qualified buyers
- 1,146 exhibiting companies
- 585,000 net square feet of exhibit space



(formerly Euro Attractions Show)
Paris, France

- 15,900 registered attendees
- 11,100 qualified buyers
- 648 exhibiting companies
- 17,500 net square meters of exhibit space



(formerly Asian Attractions Expo)
Shanghai, China

- 11,400 registered attendees
- 8,100 qualified buyers
- 429 exhibiting companies
- 13,302 net square meters of exhibit space



The continued growth and strength of the worldwide attractions industry became clear at IAAPA Expo, IAAPA Expo Europe, and IAAPA Expo Asia in 2019. All three events featured record-breaking numbers. For example, IAAPA Expo had the largest attendance in history, IAAPA Expo Europe featured a 13% increase in exhibiting companies over 2018's event, and IAAPA Expo Asia had the largest trade show floor in the event's 21-year history.

New Options for Exhibitors and Attendees in 2020

Based on member feedback, IAAPA Expo 2020 will feature a refreshed layout to expand the exhibit space, accommodate new exhibitors, and provide buyers with more reasons to remain on the floor. Additional enhancements will include increased food and beverage areas, more lounge space, and education sessions held on the trade show floor.

To achieve this goal, IAAPA Expo 2020 will expand to include the West building of the Orange County Convention Center. Located on International Drive directly across from the center's North and South buildings, the West building will allow IAAPA to enhance the Expo experience.

IAAPA Raises \$155,000 for Give Kids The World in 2019

During IAAPA Expo 2019, attendees helped raise approximately \$155,000 for Give Kids The World Village through the annual golf tournament, motorcycle ride, and fun run. 2019 marked the 25th anniversary of the IAAPA and Give Kids The World partnership. As a long-standing partner, the association has supported the IAAPA World Passport for Kids, a program that provides complimentary admission to participating IAAPA-member facilities for Give Kids The World wish children and their immediate families. To date, IAAPA and its members have donated more than \$1 million to Give Kids The World.

IAAPA HELPS MEMBERS AROUND THE WORLD CONNECT AND GROW VIA NETWORKING, SECURITY, AND EDUCATIONAL EVENTS

Asia-Pacific

- In May, about 90 participants attended the Meet IAAPA networking event in Shanghai, China.
- IAAPA Institute for Attractions Managers in Manila, Philippines, drew 50 attendees from nine countries in July for three days of learning and networking.
- The IAAPA Asia Pacific Summit in October attracted more than 100 industry leaders to Hainan, China, for seminars and tours of Wet'n'Wild Haikou, Mission Hills Resort, Atlantis Sanya, and Hainan Ocean Paradise Resort.
- In December in Singapore, IAAPA Institute for Attractions Managers hosted 45 industry professionals, and 40 people attended IAAPA Safety Institute.

Europe, Middle East, Africa

- Seventy-five participants attended IAAPA EMEA Winter Summit at the Canary Islands in January.
- IAAPA Leadership Conference in Abu Dhabi/Dubai, United Arab Emirates, in February brought together 200 top-level attractions industry leaders. Attendees toured many of the region's most popular attractions, including Warner Bros. World Abu Dhabi, Louvre Abu Dhabi, IMG Worlds of Adventure, Global Village Dubai, La Perle, and Laguna Waterpark – La Mer. In addition, participants toured the Expo 2020 Dubai festival park site.

- More than 125 attractions industry professionals from 17 countries gathered in May to explore leading attractions in Finland during IAAPA EMEA Spring Summit. Participants took part in immersive tours of Linnanmäki, Särkänniemi, and Haltia. A Post Tour took place in St. Petersburg, Russia. Attendees experienced Divo Ostrov amusement park, Russian ballet night at the Mariinsky Theatre, and the State Hermitage Museum of Art and Culture.
- In August, the association held its first IAAPA Institute for Attractions Managers in Africa. The event took place in Cape Town, South Africa, and 26 people attended.
- Eighty industry professionals traveled to London, United Kingdom, for IAAPA EMEA Christmas Summit.

North America

- To create more engagement opportunities for members, the IAAPA North America team executed Meet IAAPA events in Orlando, Florida; Dallas, Texas; Gurnee, Illinois; New Orleans, Louisiana; Las Vegas, Nevada; Daytona Beach, Florida; and Atlanta, Georgia.
- More than 200 family entertainment center (FEC) industry professionals from 35 states and 10 countries gathered in Austin, Texas, for IAAPA FEC Summit 2019, the industry's leading international conference for FEC owners and operators.

- In July, IAAPA CEO and President Hal McEvoy, 2019 IAAPA Chairman of the Board David Rosenberg, and John Hallenbeck, vice president and executive director of IAAPA North America, visited members in Canada and the United States, including Ripley's Aquarium of Canada, Toronto Zoo, Seabreeze Amusement Park, Morey's Piers, Dutch Wonderland, Knoebels Amusement Resort, and Hersheypark.

Latin America, Caribbean

- More than 120 people from 19 countries attended IAAPA Latin American Summit in Guatemala in April. Attendees visited several parks and attractions in Guatemala City and Retalhuleu: Mundo Petapa, La Aurora Zoo, Xetulul, Xocomil, and the new Xejuyup adventure park. For the first time, the whole event featured simultaneous interpretation.
- August's IAAPA Institute for Attractions Managers in Sao Paulo, Brazil, was presented for the first time in Spanish and Portuguese. Topics covered included finance, revenue management, marketing, leadership, safety, and security, and 35 people from four countries attended.
- September's IAAPA Entertainment Industry Conference in Mexico City, Mexico, drew 167 attendees.

IAAPA'S GLOBAL SAFETY AND ADVOCACY WORK FOCUSES ON SECURITY, STANDARDS HARMONIZATION, AND MORE

Global

- IAAPA hosted safety standards harmonization meetings at all three IAAPA Expos in 2019 in Orlando, Florida; Shanghai, China; and Paris, France.
- Participation in and support of ISO/TC 254 safety standards work continued.

Asia-Pacific

- Development of an Australian edition of the ASTM F24 Standards continued with the Australian Amusement, Leisure, and Recreation Association.
- IAAPA met with government officials in Japan, China, Korea, Australia, Philippines, Macao SAR, Hong Kong SAR, and Indonesia to further efforts on safety harmonization and discuss the needs of the amusement and attractions industry. Members also visited various countries to meet with government officials to share knowledge related to international safety standards.
- The established country relationships have extended regulators in each of these countries to become more aware of needs to harmonize and to communicate incidents on a global level to prepare for aggregate statistics about the high level of safety within the attractions industry. Safety awareness also has become a key focus for various members in the region without international standards.
- To lower safety incidents in the region, IAAPA has reached out to key members in support of growing in-country efforts focused on safety training for operators, manufacturers, and regulators. A sustainable way of maintaining an effective and low-cost way of training has become a core focus for

many countries within the region.

Europe, Middle East, Africa

- Based on the support of Merlin Entertainments, the IAAPA EMEA Security Subcommittee created “Visitor Attraction Security Guidance: A 10-Point Review Plan.” This guidance serves as an ongoing reference source for security best practices.
- The IAAPA Safety Subcommittee released white papers on how to identify and mitigate risks linked to guest behavior and ride commissioning planning and implementation.
- IAAPA wrote a statement of support to the mayor of Barcelona, Spain, for the Barcelona Zoo.

Latin America, Caribbean

- The Latin American Advisory Committee met with congressmen and the minister of tourism in Brasilia, Brazil, in May to talk about the economic and social impact of the attractions industry and challenges in the country.
- The two-day IAAPA Safety Institute in Quito, Ecuador, in June, educated industry professionals on improving training and the safety culture at their facilities. The event drew 34 people, including government officials.
- More than 150 Colombian operators attended the IAAPA Global Safety Forum in Bogotá in October. They examined issues on creating and maintaining comprehensive safety programs and learned the latest developments and best practices in ride standards and design, loss prevention, risk management, and safety compliance.

In 2016, IAAPA—sponsored by the U.S. International Trade Commission—began the appeal of the classification of attractions equipment with the World Customs Organization (WCO). Attractions equipment is currently classified as a consumer good in a miscellaneous category in the Toys, Games, and Sporting Goods chapter. The WCO Board accepted the appeal in June 2019, triggering a six-month comment period before final adoption. At the end of January 2020, the appeal should be approved and countries will begin assessing the new codes for adoption in January 2022. IAAPA will host member webinars in 2020 to introduce the new codes, as well as monitor the code adoption by key countries.

- IAAPA Latin America, Caribbean played an instrumental role in the signing of a Memorandum of Cooperation between ASTM F24 and the Mexico City government. IAAPA brought technical experts together with the government of Mexico City to work on amusement ride safety and related legislation that could reference ASTM International standards.

North America Federal

- IAAPA U.S. Advocacy Days 2019 brought 40 North American-based attractions industry leaders to Washington, D.C., to meet with 66 congressional representatives and discuss the industry's legislative priorities and regulatory issues.
- IAAPA's U.S. federal government relations team actively lobbied against policy changes to the U.S. Department of State's J-1 Summer Work Travel Program. Other policy issues IAAPA lobbied throughout the year included ride safety, unmanned aircraft systems (also known as drones), the U.S. Department of Labor's overtime regulation, and tariffs.
- IAAPA developed and introduced the IAAPA Security Exchange, an avenue for global attractions industry security management professionals to connect to discuss key topics and best practices.
- The National Lieutenant Governors Association passed in July the Resolution in Support of Amusement Ride Safety, recognizing amusement ride safety within the United

States. IAAPA drafted the policy resolution using IAAPA's Guideline for Effective Amusement Ride Safety Regulation in the U.S.

North America State-Level

- In March, Kentucky Gov. Matt Bevin signed into law House Bill 257, establishing rider responsibility legislation in the state, and Senate Bill 219, allowing 16-year-olds to operate amusement rides in the state, matching U.S. federal law; and Utah Gov. Gary Herbert signed into law House Bill 381, establishing statewide ride safety legislation, and House Bill 150, establishing trampoline park safety standards.
- IAAPA helped defeat Nevada Senate Bill 412 in April. The bill would have made it a misdemeanor for an arcade or amusement center operator to allow a person under age 18 to operate or play any amusement device, which offers some type of reward for winning other than a free play unless the person is accompanied by an adult.
- In May, more than 30 people attended a security roundtable held at Six Flags Over Texas in Arlington.
- In June, Louisiana Gov. John Bel Edwards signed into law House Bill 464, amending the state's ride safety statute relating to inflatable amusement devices, attractions, and rides.
- New Hampshire Gov. Chris Sununu spoke on implementing post-Labor Day school start legislation in the United States at IAAPA Expo in November.

IAAPA RESEARCH PROJECTS PROVIDE VALUABLE, ACCURATE, TIMELY DATA FOR MEMBERS

IAAPA completed multiple research reports in 2019, which are available online and are complimentary to members. These reports include:

- The IAAPA Global Theme and Amusement Park Outlook 2019-2023, which offers an overview of attendance and in-park revenue for the global theme and amusement park industry based on data collected in 2018 and 2019. It also provides an industry forecast for 2019-2023 for attendance, per capita spend, and total in-park spending.
- The Benchmark Series expanded in 2019 to include zoos and aquariums, museum and science centers, themed and other attractions, as well as amusement parks, water parks, and FECs. Each benchmark study presents metrics on a range of facility activities, including guest demographics, revenue, expenses, admissions, and human resources for a specific segment. An executive summary that compares all six segments using common metrics is also available to IAAPA members.

HISTORICAL PERFORMANCE (US\$ in Millions)

	2010 Actual	2011 Actual	2012 Actual	2013 Actual	2014 Actual	2015 Actual	2016 Actual	2017 Actual	2018 Actual	2019 Forecast*
Revenue	\$14.0	\$16.4	\$18.4	\$20.9	\$23.5	\$24.7	\$27.9	\$29.2	\$32.8	\$35.7
Expenses	\$14.1	\$15.2	\$17.1	\$18.8	\$20.5	\$22.6	\$24.2	\$25.8	\$31.0	\$33.6
Surplus from Ops	-\$0.1	\$1.2	\$1.3	\$2.1	\$3.0	\$2.1	\$3.8	\$3.4	\$1.8	\$2.1
Gain/(Loss) Investment	\$0.5	-\$0.1	\$0.8	\$0.7	-\$0.1	\$0.1	\$0.6	\$1.8	-\$0.4	\$2.0
Relocation to Orlando	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.3	\$1.5	\$0.2	\$0.0
Gain on Asset Disposition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.6
Addition to Reserves	\$0.4	\$1.1	\$2.1	\$2.8	\$2.9	\$2.2	\$4.1	\$3.7	\$1.2	\$5.7

*INCLUDES \$1.6M GAIN ON ASSET DISPOSITION (PRIMARILY VA OFFICE SALE)



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