

IAAPA EMEA Advisory Committee - Learnings on the current situation

30 November 2020

The IAAPA EMEA Advisory Committee recommends programs and services of the association for the EMEA region. It consists of representatives from various countries and constituencies. As part of their most recent meeting, they discussed the current situation and learnings from the COVID19 pandemic and decided to share the outcome with all members.

Note: This is a summary of the members of the IAAPA EMEA Advisory Committee and does not address every consideration for all amusement parks or attractions. IAAPA assumes no responsibility but offers these best practices to members for consideration.

Operator Perspective

- Decrease in attendance varied widely between different areas and attractions, anywhere between 5% and 70% down compared to 2019 for those who were allowed to open
- Increase of per-cap spend across the EMEA region
- A strong focus on secondary spend and F&B offering supported this trend
- Safety stays priority #1: Offer a safe experience
- Just because team members follow the rules in the park, does not mean they do it at home
- Know your stakeholders. Keep a close relationship with them and show them how you can operate safely. Operators have to guide authorities on how to operate successful
- Working with politicians and not through media seemed to be more helpful in reopening measures
- Parks focusing on young audiences performed better than those targeting families
- Renegotiate with your (F&B) suppliers
- Many attractions worked on dynamic pricing and improved the yield price
- Going cashless and online booking systems were also helping in 2020 and are likely to stay at many attractions
- Do not be lazy: Make it easy for the customer, not for you! Do not force customers to do something which mainly suits you

Operator Outlook:

- An improvement of the overall situation is expected to happen after Easter 2021 with a tough start and a stronger end
- Low international demand in 2021, priority on regional markets. Airport capacities are and will still be reduced
- “Back-to-normal” is expected by 2022
- Shows are likely to start slower/later in the 2021 season
- With the current measures on cost-savings, the business should be more profitable by then
- Key question for the time to come: Will guest quality be more important than guest quantity in the future?

Supplier Perspective

- Executing jobs which were contracted before crisis hits
- Reviewing payment terms with clients
- No drop of signed businesses, rather delays of certain projects
- Few parks and groups continuing to invest
- The few new requests are more serious
- Concerns among manufacturers and suppliers about 2021 and 2022
- Bringing work back inhouse
- Things will pick up again and that will need specialized human resources
- Time to work on things, which were neglected due to workload
- Focus on innovation

Overall

- Organizations have used the opportunity to become much leaner. This should pay off in 2022
- It is the right moment to finetune the teams and identify performing and non-performing staff for potential staff reductions
- Focus on employee satisfaction of the remaining teams
- Vaccination will take time
- Keep your product relevant
- Adopt, adapt, and improve