LDP Objective Analysis Creative Thinking

Swedish Parks Association

– Economic Impact Assessment (EIA)

LDP Objective Analysis Creative Thinking

Introduction & methodology

Introduction

- The Swedish Parks Association have asked Leisure Development Partners (LDP) to complete an Economic Impact Assessment (EIA) for their member parks. The Swedish Parks Association comprises eight member parks:
  - Astrid Lindgrens Värld
  - Furuviksparken
  - Grona Lund
  - Gustavsvik Resort
  - Kolmarden
  - Liseberg
  - Parken Zoo
  - Skara Sommarland
- In this report we outline our methodology, provide an overview of each of the parks, and detail the findings of our EIA
- As part of the work process we have gathered detailed information on each of the parks' performance and have therefore been able to benchmark key performance indicators (KIPs) both between member parks, and against international comparables
- LDP would like to take this opportunity thank all of the Swedish Parks Association members for being so cooperative and helpful in this endeavour

EIA Methodology

- In order to assess the economic impact of any business and in this case the eight parks and zoos, there are a number of key impacts we need to assess, including
  - Direct impacts – such as employment and monetary contributions generated by the park
  - Indirect impacts – such as employment and output supported by the park via the supply chain and by the spending of those employed directly or indirectly by the park
  - Wider impacts – the extent to which the activities of the park contribute to performance in other sectors of the economy, in this case particularly tourism
- For this project therefore, and in order to capture all of the impacts that each of the eight parks have on the local and regional economies, we have looked at five distinct impacts:
  - **Operational impact:** this is the monetary impact on the economy of ongoing operations
  - **Operational employment impact:** this is the impact on employment of ongoing operations
  - **Construction impact:** this is the impact of parks ongoing investment and the monetary impact it has on economy
  - **Construction employment impact:** this is the impact of that investment has on employment
  - **Tourism impact:** this is the impact the park has on tourism in the local economy
- On the next few slides we outline the methodology in a little more detail

Impact of operations

- In order to assess the impact of the ongoing park operations we have assessed both the monetary and employment impact of the various parks
- For the total monetary impact of the parks we have measured this in the following way:
  - **Total revenues (less of sales tax)** of the parks in 2014
  - **Minus leakage** i.e. revenues assumed to be lost to outside the local area (e.g. employees living, say, further than an hour away from the park)
  - **Minus displacement** i.e. revenues generated resulting in a loss of revenues elsewhere in the economy (e.g. spend at F&B park operation might mean not spending at a restaurant elsewhere)
  - **Multiplied by industry multiplier** i.e. accounts for indirect and induced impacts (e.g. an indirect impact would be employees spending on goods and services in the area, and induced impacts would be revenues generated as a result of the indirect spend. The type II multiplier measures the indirect plus induced impacts.
- For the employment impact of the parks we have used the same methodology but applied to jobs:
  - **Total direct jobs** attributable to the park in 2014
  - **Minus leakage** (again, e.g. staff living far away from the park)
  - **Minus displacement** (e.g. jobs lost as a result of the park being there)
  - **Multiplied by industry multiplier**

Impact of construction

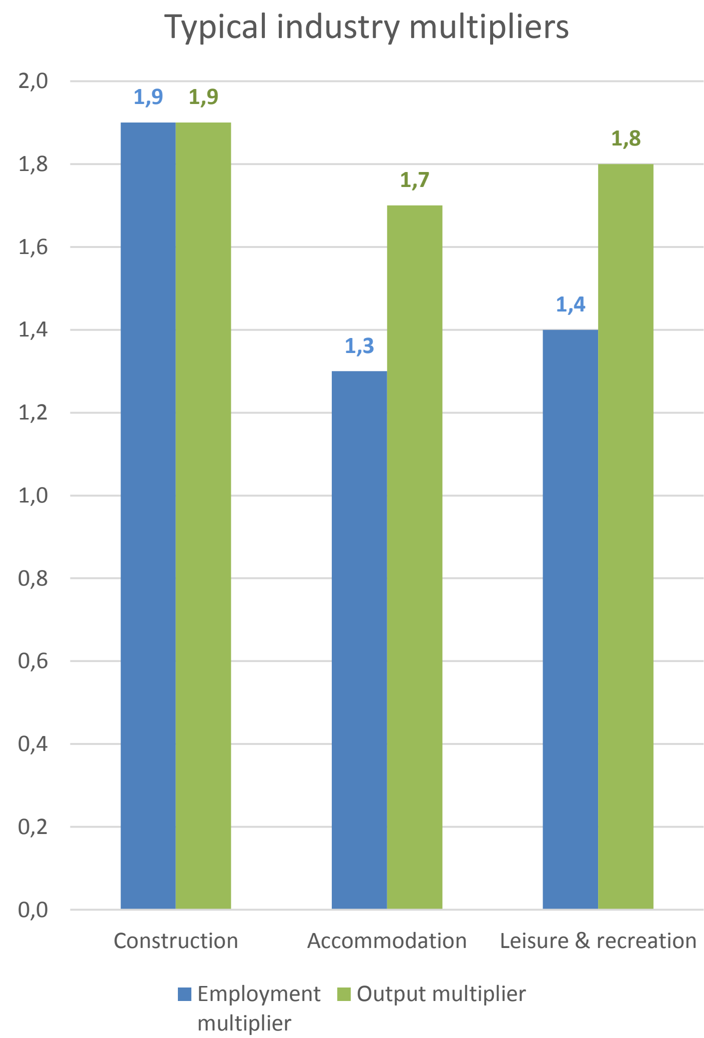
- Given the typically high and necessary level of investment in attractions construction impacts are viewed as an additional impact. Indeed expanding the park, building new attractions and employing workers in order to expand the parks is outside of the typical park operations
- For the total monetary impact of investment of the parks we have measured this in the following way:
  - **Average annual spend on investment / construction** over last 5 – 10 years (as spend can be 'lumpy')
  - **Minus leakage** e.g. products imported from outside the local area
  - **Minus displacement** e.g. spend not on other things as a result of the investment
  - **Multiplied by industry multiplier**
- Similarly, employment impact of investment and construction park expansions is calculated in a similar way:
  - **Total direct jobs attributable** the investment
  - **Minus leakage** (again, e.g. construction employees far away from the park)
  - **Minus displacement** (e.g. jobs lost as a result of the investment – likely be very low)
  - **Multiplied by industry multiplier**

Impact on tourism

- Theme / amusement parks, zoos and waterparks are popular activities with tourists and in many cases drive a significant level of visitation. This has an additional impact on the economy as the tourists that come to the park as a direct result of the park will spend money on accommodation, food and beverage, retail, on additional leisure pursuits and so forth.
- As such we have treated this as an additive impact. In order to calculate this impact we took the following steps:
  - As a **'top-down' approach** we have first looked at the number of tourists visiting each park, based on park management estimates of how many visitors are tourists staying overnight in the area
  - Whilst this provided us with a useful starting point and sense-check, it is too simplistic to say that all these tourists are 'induced' (as in, the primary purpose of their trip was to visit the park), Indeed, the primary purpose of visit to the area maybe visiting friends and relatives, or the visit may be secondary to business visit, a concert, a special event, amongst other reasons. therefore we needed to adopted a **'bottom-up' approach** to our analysis.
- To estimate the proportion of tourists induced, we asked a sample of hotel managers in the area:
  - The approximate proportion of annual roomnight demand that books accommodation with primary/specific intention of visiting the park
  - The approximate proportion of annual roomnight demand that visits said hotel for other primary reasons but that also makes a visit to the park as an additional 'add-on' activity
- This gives a much clearer indication of the number of people staying in the area because of the park

Leakage, displacement & multipliers

- The core inputs such as total revenues, total number of annual staff and investment levels were obtained from the parks.
- The next was to quantify leakage, displacement and industry multipliers:
  - **Leakage** is difficult to quantify but according to official sources 'low' leakage is typically set at around 10%, whilst a 'medium' level of leakage is set at 25%, and high at 75%. LDP have taken a view as to the extent of leakage by park and by type of impact.
  - For **displacement** official sources set displacement at 25% if it is 'low' and 50% if 'medium' and 75% if 'high'. Again, LDP have taken a view on in each case but given the unique nature of the park business we feel displacement is likely to be very low.
  - To calculate **multipliers** we have used UK sector benchmarks and then sense-checked and adjusted using official input/output models provided by Statistics Sweden. We have used type II multipliers which include both indirect and induced impacts, which are shown opposite:



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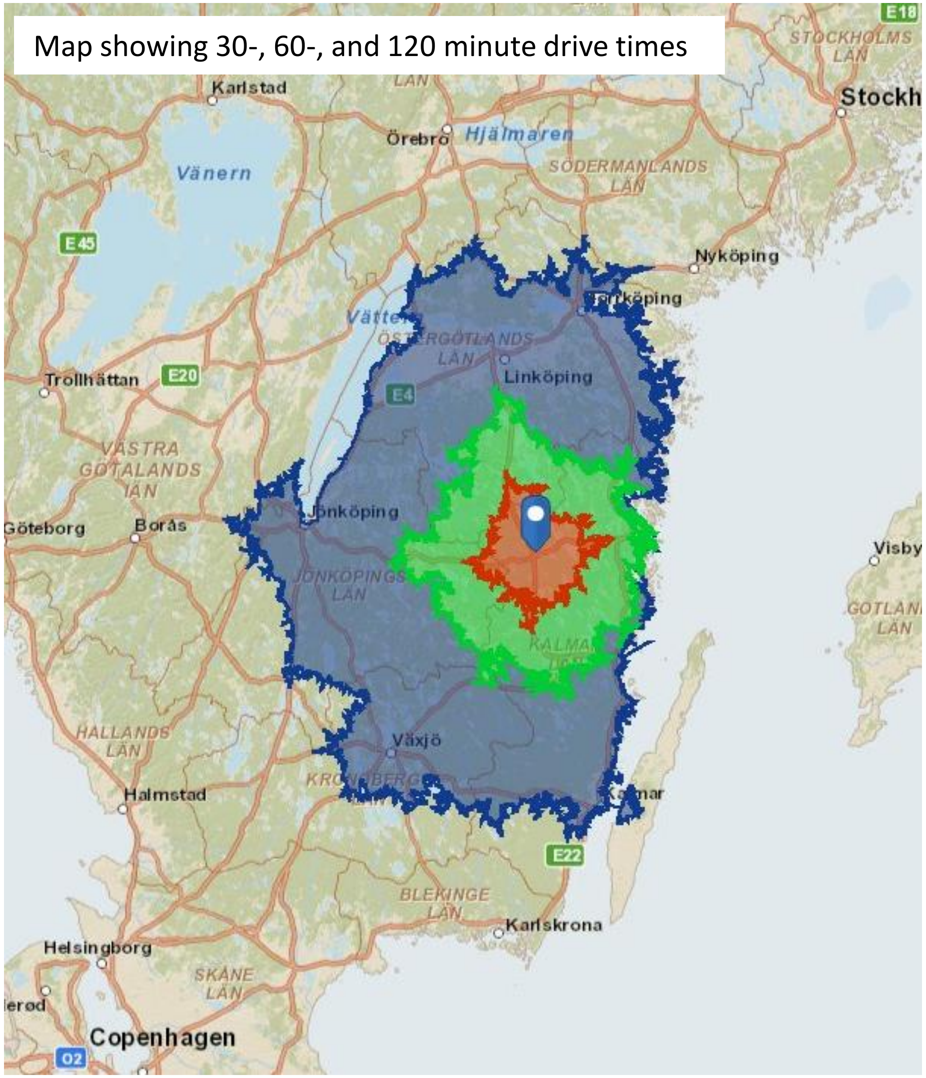
Parks overview

Introduction

- As part of this work LDP visited each of the parks under review and spoke with management at each park. In the following section we summarise each of the parks under review, highlight a bit about the park, some key performance indicators (KIPs), map of the park with drive times, and available markets
- Attendance levels at visitor attractions and leisure facilities are a function of a large number of factors including the size and characteristics of available resident and tourist markets, hence why we have shown them here.
- Many attractions and entertainment centres are unable to draw visits from beyond an hour and many family entertainment centres (FECs), for example, only attract visits from a 30 minute market or less. However, given the scale and appeal of the various attractions under review we have reviewed a resident market out to 120 minutes drive-time. We have sub-divided this market into primary (0-60 minutes) and secondary (60-120 minutes) markets so that to take into account of diminishing propensity to visit as drive time increases.
- Those people visiting the site but who live more than two hours from the site are likely to stay in the area overnight and are thus considered in the domestic tourist market. Tourists generally travel for up to a maximum of one hour from their holiday base when visiting attractions therefore we have calculated the tourist markets based on a 60 minute drive time.
- Calculating the available resident and tourist markets allows us to benchmark parks performance (specifically market penetration) against each other and against international comparables.

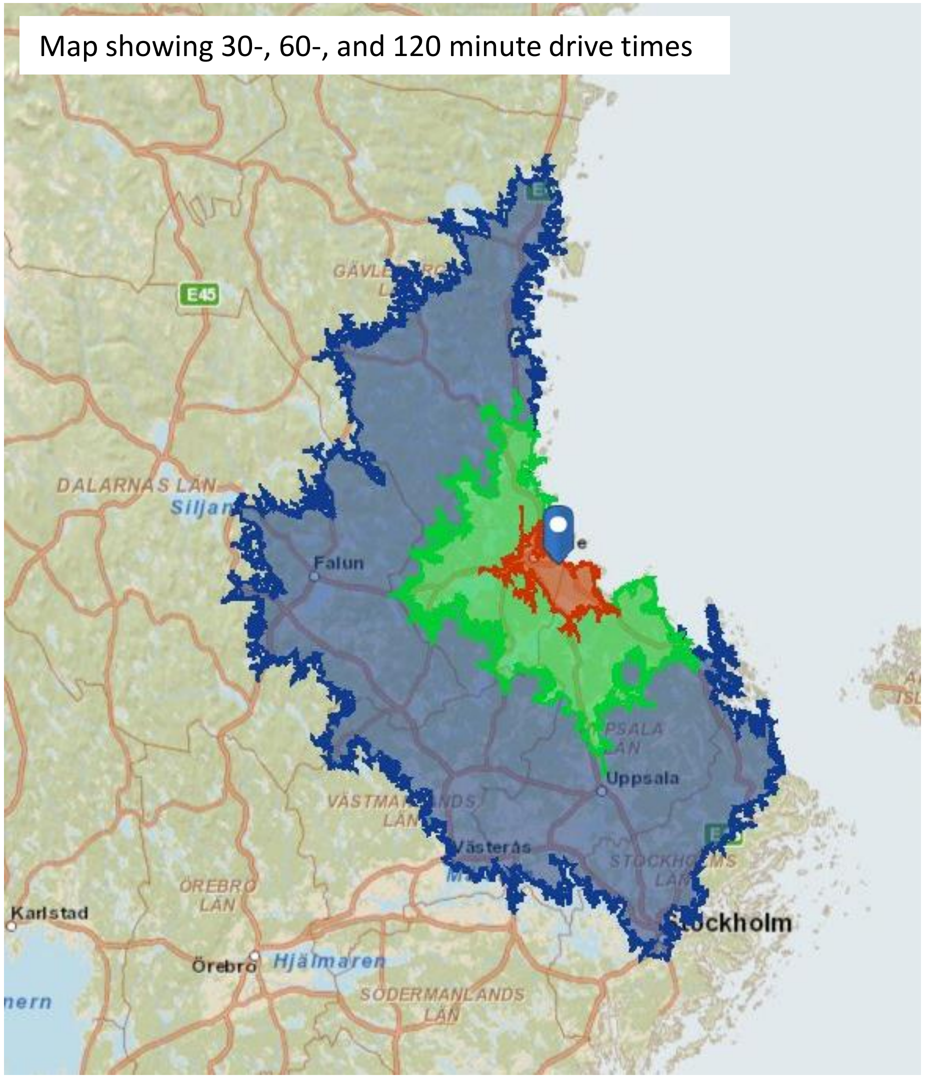
Astrid Lindgrens Värld



- Opened – **1981**
- Typology – **Pay-one price theme park**
- Park area – **16 ha (including camping)**
- Opening times (2015) – **Mid May - end Aug**
- Design day attendance – **10,500**
- Lead price (2015) – **SEK 250**
- Attendance (2014)– **492,000**
- Estimated average length of stay (ALOS) – **6.0 hours**

Available markets	
	2014
Resident markets	
Primary (0-60 minutes drive)	94,680
Secondary (60-120 minutes drive)	764,450
Total resident markets	**859,130**
Tourist markets	
Domestic tourists	978,252
International tourists	150,337
Total tourist markets	**1,128,589**
Total markets	**1,987,719**

Furuvik



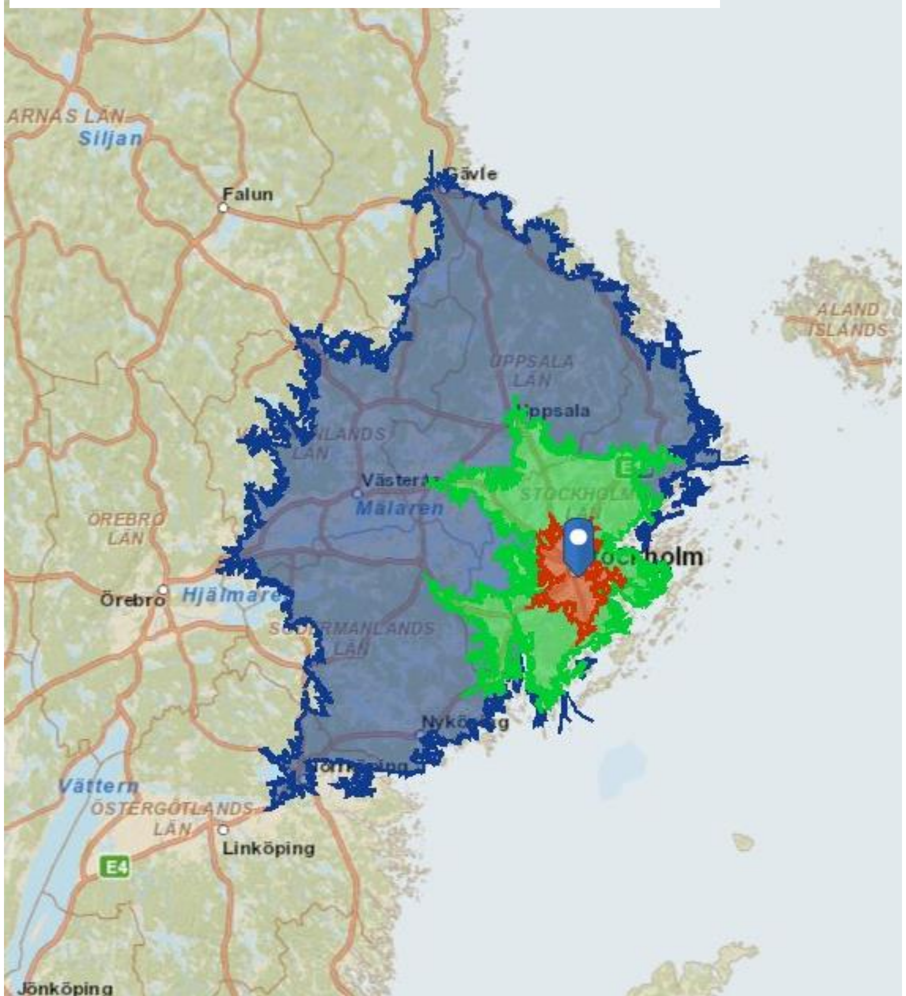
Map showing 30-, 60-, and 120 minute drive times

- Opened – **1900**
- Typology – **Pay-one-price zoo with amusement park**
- Opening times (2015) – **End May - end Aug**
- Design day attendance – **5,000**
- Lead price (2015) – **SEK 225**
- Attendance (2014)– **240,000**
- Estimated average length of stay (ALOS) – **5.5 hours**

Available markets	
	2014
Resident markets	
Primary (0-60 minutes drive)	172,534
Secondary (60-120 minutes drive)	2,182,846
Total resident markets	**2,355,380**
Tourist markets	
Domestic tourists	256,020
International tourists	27,601
Total tourist markets	**283,621**
Total markets	**2,639,001**

Grona Lund

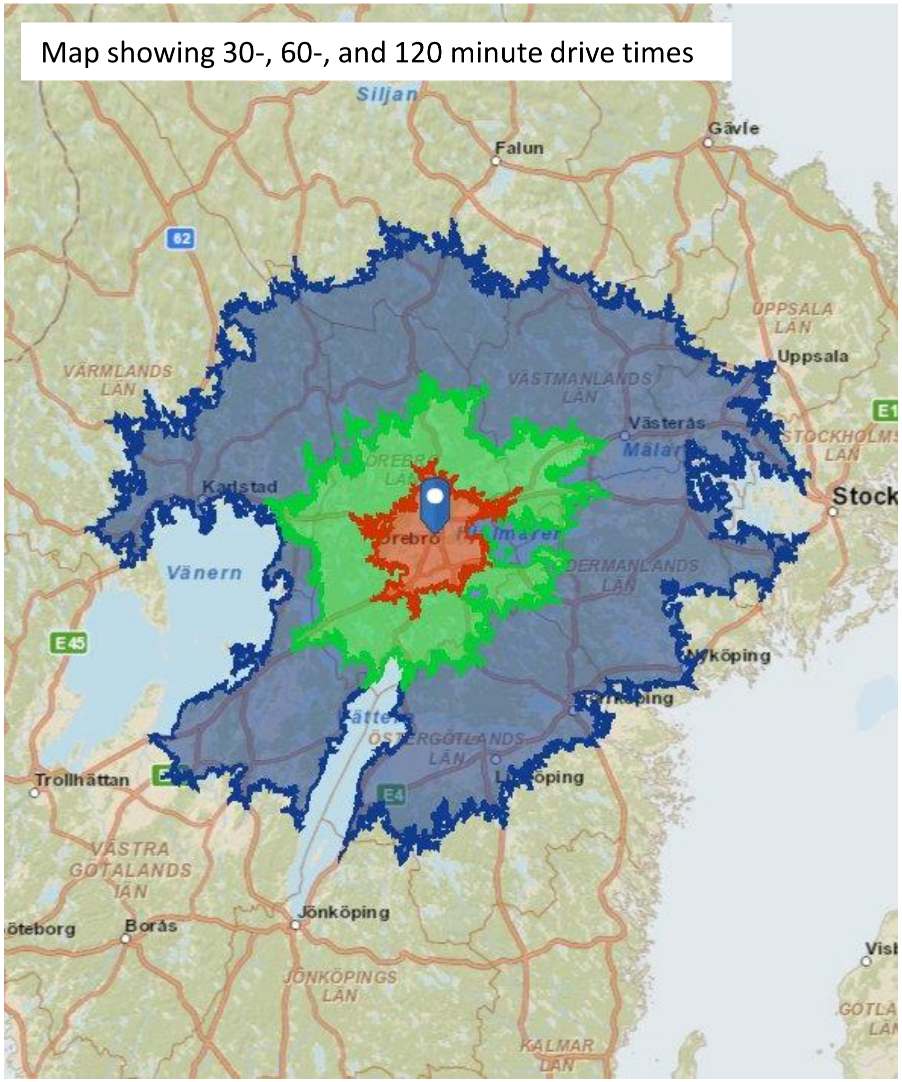
Map showing 30-, 60-, and 120 minute drive times



- Opened – **1883**
- Typology – **Pay-as-you-go amusement park**
- Park area – **3.8 ha**
- Opening times (2015) – **End May - end Sept**
- Design day attendance – **12,500**
- Lead price (2015) – **SEK 389**
- Attendance (2014)– **1.3 million**
- Estimated average length of stay (ALOS) – **5.0 hours**

Available markets	
	2014
Resident markets	
Primary (0-60 minutes drive)	1,868,863
Secondary (60-120 minutes drive)	963,718
Total resident markets	**2,832,581**
Tourist markets	
Domestic tourists	4,415,037
International tourists	1,729,915
Total tourist markets	**6,144,952**
Total markets	**8,977,533**

Gustavsvik

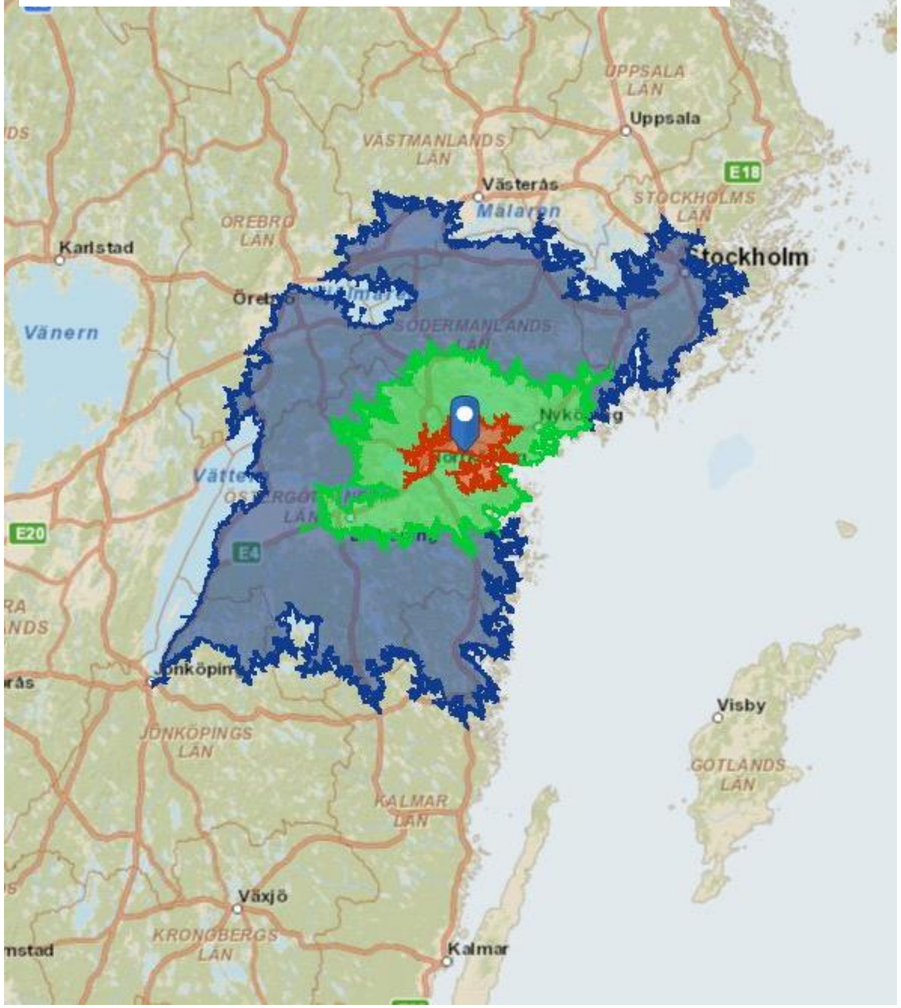


- Opened – **1963**
- Typology – **Pay-one-price indoor waterpark with outside area**
- Park area – **30 ha**
- Opening times (2015) – **Year round**
- Design day attendance – **1,800 (waterpark only)**
- Lead price (2015) – **SEK 185**
- Attendance (2014)– **380,000 (waterpark only)**
- Estimated average length of stay (ALOS) – **3.5 hours**

Available markets	
	2014
Resident markets	
Primary (0-60 minutes drive)	342,904
Secondary (60-120 minutes drive)	1,315,052
Total resident markets	**1,657,956**
Tourist markets	
Domestic tourists	646,000
International tourists	105,057
Total tourist markets	**751,057**
Total markets	**2,409,013**

Kolmarden

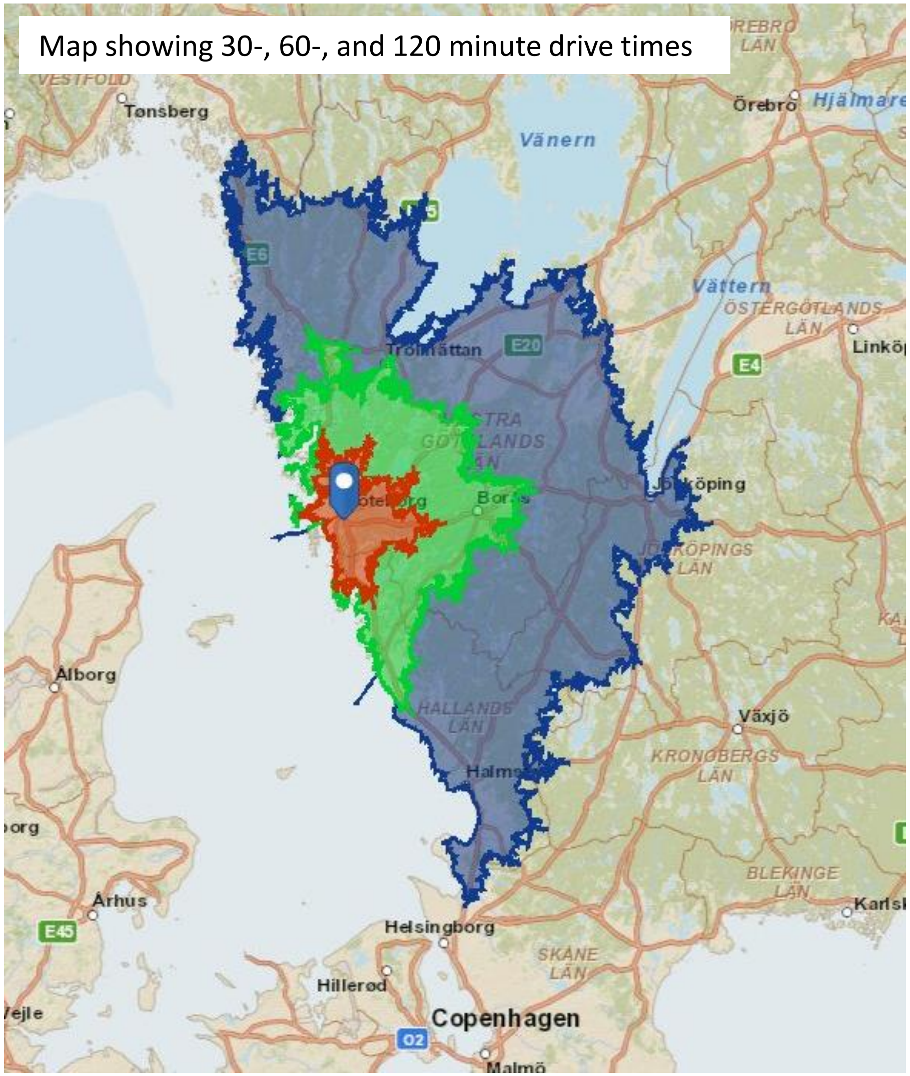
Map showing 30-, 60-, and 120 minute drive times



- Opened – **1965**
- Typology – **Pay-one-price zoo**
- Park area – **150 ha**
- Opening times (2015) – **Early May - end Sept**
- Lead price (2015) – **SEK 399**
- Attendance (2014)– **510,000**
- Estimated average length of stay (ALOS) – **7.0 hours**

Available markets	
	2014
Resident markets	
Primary (0-60 minutes drive)	413,507
Secondary (60-120 minutes drive)	2,129,826
Total resident markets	**2,543,333**
Tourist markets	
Domestic tourists	473,797
International tourists	67,825
Total tourist markets	**541,622**
Total markets	**3,084,955**

Liseberg



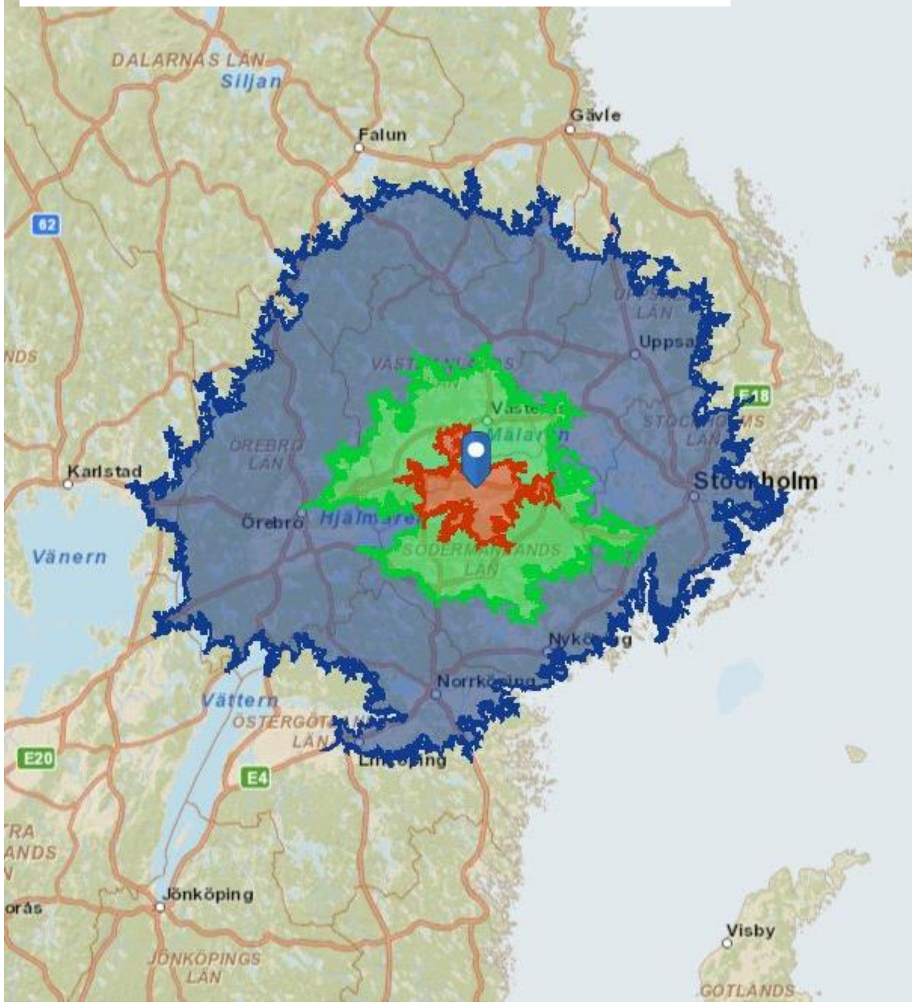
Map showing 30-, 60-, and 120 minute drive times

- Opened – **1923**
- Typology – **Pay-as-you-go amusement park**
- Park area – **16 ha**
- Opening times (2015) – **Early May - end Sept + Christmas**
- Design day attendance – **15,000**
- Lead price (2015) – **SEK 425,000**
- Attendance (2014)– **3.1 million**
- Estimated average length of stay (ALOS) – **4.9 hours**

Available markets	
	2013
Resident markets	
Primary (0-60 minutes drive)	1,368,778
Secondary (60-120 minutes drive)	696,186
Total resident markets	**2,064,964**
Tourist markets	
Domestic tourists	3,058,125
International tourists	903,552
Total tourist markets	**3,961,677**
Total markets	**6,026,641**

Parken Zoo

Map showing 30-, 60-, and 120 minute drive times



- Opened – **1954**
- Typology – **Pay-one-price zoo with amusement park**
- Park area – **30 ha (including camping)**
- Opening times (2015) – **May - Sept**
- Design day attendance – **6,000**
- Lead price (2015) – **SEK 350**
- Attendance (2014)– **200,000**
- Estimated average length of stay (ALOS) – **5.4 hours**

Available markets	
	2014
Resident markets	
Primary (0-60 minutes drive)	412,599
Secondary (60-120 minutes drive)	2,745,918
Total resident markets	**3,158,517**
Tourist markets	
Domestic tourists	490,278
International tourists	68,660
Total tourist markets	**558,938**
Total markets	**3,717,455**

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Economic Impact Assessment (EIA) – Operational & Investment Impact

Introduction

- As we described in the introduction / methodology for each park we have looked at the monetary and employment impact for each park (plus accommodation) and in this section we show the outputs of this assessment. When we refer to the local areas we are referring to a one hour drive of the park.
- The multipliers we showed earlier in the report were based on detailed UK multipliers by sector then sense-check against input/output tables provide by Statistics Sweden.
- For the construction (or investment) we took the UK multiplier of 2.0 for both employment and revenues (output) and nudged this down a fraction to **1.9** based on the Statistics Sweden data. The employment and output multipliers for leisure & recreation services (i.e. in this case the park operations) of **1.4** and **1.8** respectively were consistent from the UK to Sweden.
- For the impact of investment / construction, to get to the impact on employment we took the total average spend on investment in the park over the past 5 years and divided this by a annual gross value (GVA) added figure per head of **SEK 450,000.** This figure was calculate by taking total construction output in Sweden and dividing this by the total number of people employed in construction in the same year.
- In regard to leakage and displacement we have split the parks into two discrete groups – those in the major cities (Liseberg & Grona Lund) and those in more remote locations and smaller towns (the other six parks). The rationale for this was because in our view in Gothenburg and Stockholm there is likely to be less leakage as most of the employees will live and work in these locations.

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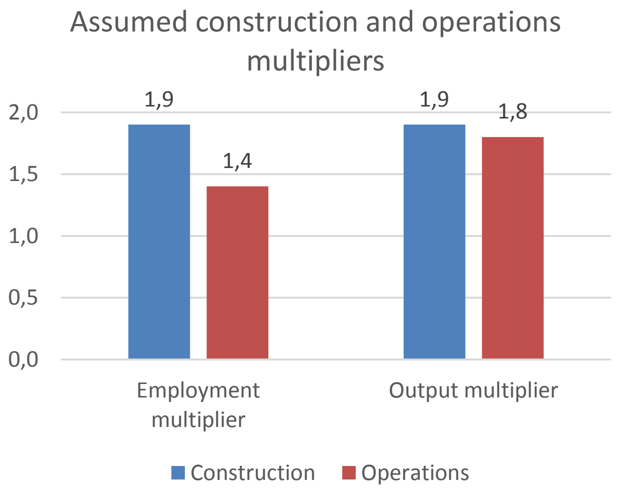
- This is likely to be particularly true in terms of construction employment impact, for example, as the workforce is likely to be available in the two major cities to complete any expansions, whereas at the more rural parks, temporary employees may need to be bought in from other parts of Sweden. The supply of good and parts for new expansions are also likely to be manufactured / bought in from other areas of the country or from abroad.

- We would expect given the unique nature of the amusement parks, zoos and waterparks, that displacement will be very low in all cases as there is very little competition in each market (part from perhaps food & beverage spend in some locations). The table and chart below summarise our assumptions



Assumed leakage and displacement

	Other parks		Liseberg & Grona Lund	
Leakage	Employment leakage	Output leakage	Employment leakage	Output leakage
Construction	30%	40%	10%	20%
Operations	10%	15%	5%	10%
Displacement	Employment displacement	Output displacement	Employment displacement	Output displacement
Construction	5%	5%	5%	5%
Operations	3%	3%	3%	3%

Astrid Lindgrens Värld

- Opposite we summarise the operational impacts for Astrid Lindgrens World
- With a total revenues in 2014 (including camping) of SEK 172 million we estimate the total monetary impact of park operations on the regional economy is **SEK 256 million**
- In regards to employment, there are 137 full time equivalents, which translates to a total employment impact of operations of **168**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Astrid Lindgrens Värld – operational impacts	
	2014
Net Revenue	
Gross Revenues (SEK)	171,533,022
Less Leakage	15%
Revenues Less Leakage (SEK)	145,803,069
Less Displacement	3%
Net Revenue (SEK)	142,157,992
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	113,726,394
Total Contribution to Regional Economy (SEK)	**255,884,386**
Direct Operational Employment	
Annual Visitors	491,975
Attendance per FTE	3,591
Direct FTE Operational Employment	137
Less Leakage	10%
Operational Employment Less Leakage	123
Less Displacement	3%
Net Direct Employment	120
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	48
Total Employment	**168**

Astrid Lindgrens Värld

- Investment in the park has been substantial over recent years and there is substantial investment in the pipeline (including expansion of the existing accommodation for instance)
- We estimate the total impact of investment on the local economy is around **SEK 35 million per annum**
- Despite some likely leakage this translates into the equivalent of **92 full time jobs**

Astrid Lindgrens Värld – construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	32,663,898
Less Leakage	40%
Construction Costs Less Leakage	19,598,339
Less Displacement	5%
Net Development Cost (SEK)	18,618,422
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	16,756,580
Total Contribution to Regional Economy (SEK)	**35,375,001**
Direct Construction Employment	
Construction Cost (SEK)	32,663,898
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	73
Less Leakage	30%
Construction Employment Less Leakage	51
Less Displacement	5%
Net Direct Employment	48
Economic Multiplier (Type II)	2
Induced and Indirect Employment	43
Total Construction Employment	**92**

Furuvik

- Opposite we summarise the operational impacts for Furuviksparken
- With a total revenues in 2014 (including camping) of SEK 76 million we estimate the total monetary impact of park operations on the regional economy is **SEK 114 million**
- In regards to employment, there are 62 full time equivalents, which translates to a total employment impact of operations of **76**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Furuvik– operational impacts	
	2014
Net Revenue	
Gross Revenues (SEK)	76,405,000
Less Leakage	15%
Revenues Less Leakage (SEK)	64,944,250
Less Displacement	3%
Net Revenue (SEK)	63,320,644
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	50,656,515
Total Contribution to Regional Economy (SEK)	**113,977,159**
Direct Operational Employment	
Annual Visitors	238,439
Attendance per FTE	3,846
Direct FTE Operational Employment	62
Less Leakage	10%
Operational Employment Less Leakage	56
Less Displacement	3%
Net Direct Employment	54
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	22
Total Employment	**76**

Furuvik

- Investment in the park has been substantial, particularly with the rocket attraction and new marina area in 2011 and 2014 respectively
- With an average investment over last five years of SEK 15 million we estimate the total impact of investment on the local economy is around **SEK 16 million per annum**
- Despite leakages this translates into the equivalent of **42 full time jobs**

Furuvik– construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	15,000,000
Less Leakage	40%
Construction Costs Less Leakage	9,000,000
Less Displacement	5%
Net Development Cost (SEK)	8,550,000
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	7,695,000
Total Contribution to Regional Economy (SEK)	**16,245,000**
Direct Construction Employment	
Construction Cost (SEK)	15,000,000
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	33
Less Leakage	30%
Construction Employment Less Leakage	23
Less Displacement	5%
Net Direct Employment	22
Economic Multiplier (Type II)	2
Induced and Indirect Employment	20
Total Construction Employment	**42**

Grona Lund

- Grona Lund is currently the only park of the eight with no associated accommodation. Despite this the park drives huge revenues totalling SEK 430 million in 2014.
- We estimate the total monetary impact of park operations on the regional economy is **SEK 679 million**
- In regards to employment, there are 383 full time equivalent employees, which translates to a total employment impact of operations of **497**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Grona Lund– operational impacts	
	2014
Net Revenue	
Gross Revenues (SEK)	429,942,000
Less Leakage	10%
Revenues Less Leakage (SEK)	386,947,800
Less Displacement	3%
Net Revenue (SEK)	377,274,105
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	301,819,284
Total Contribution to Regional Economy (SEK)	**679,093,389**
Direct Operational Employment	
Annual Visitors	1,329,723
Attendance per FTE	3,472
Direct FTE Operational Employment	383
Less Leakage	5%
Operational Employment Less Leakage	364
Less Displacement	3%
Net Direct Employment	355
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	142
Total Employment	**497**

Grona Lund

- As with all the parks under review there has been an impressive programme of investment, averaging at SEK 45 million over the past five years
- We would expect less leakage than for the more rural parks as a result of its city centre location, and therefore the total monetary contribution is estimated to be **SEK 65 million**
- Based on our assumptions this translates into the equivalent of **162 full time jobs**

Grona Lund – construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	45,000,000
Less Leakage	20%
Construction Costs Less Leakage	36,000,000
Less Displacement	5%
Net Development Cost (SEK)	34,200,000
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	30,780,000
Total Contribution to Regional Economy (SEK)	**64,980,000**
Direct Construction Employment	
Construction Cost (SEK)	45,000,000
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	100
Less Leakage	10%
Construction Employment Less Leakage	90
Less Displacement	5%
Net Direct Employment	86
Economic Multiplier (Type II)	2
Induced and Indirect Employment	77
Total Construction Employment	**162**

Gustavsvik

- The table opposite shows the impact of operations at Gustavsvik on the local economy
- Total revenues equated to SEK 60 million (including camping) in 2014, equating to an estimated monetary impact of **SEK 90 million**
- In regards to employment, there are 57 full time equivalent employees by our calculations, which translates to a total employment impact of operations of **70**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Gustavsvik– operational impacts	
	2014
Net Revenue	
Gross Revenues (SEK)	60,001,000
Less Leakage	15%
Revenues Less Leakage (SEK)	51,000,850
Less Displacement	3%
Net Revenue (SEK)	49,725,829
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	39,780,663
Total Contribution to Regional Economy (SEK)	**89,506,492**
Direct Operational Employment	
Annual Visitors	380,833
Attendance per FTE	6,642
Direct FTE Operational Employment	57
Less Leakage	10%
Operational Employment Less Leakage	52
Less Displacement	3%
Net Direct Employment	50
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	20
Total Employment	**70**

Gustavsvik

- Investment in the has been somewhat lumpy, but with huge investments in 2002, 2014 and 2015 over a 14 year period this averages at nearly SEK 13 million per annum
- We estimate that this equates to a economic impact of approximately **SEK 14 million**
- By our calculations this equates to total new jobs of **36**

Gustavsvik – construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	12,714,286
Less Leakage	40%
Construction Costs Less Leakage	7,628,571
Less Displacement	5%
Net Development Cost (SEK)	7,247,143
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	6,522,429
Total Contribution to Regional Economy (SEK)	**13,769,571**
Direct Construction Employment	
Construction Cost (SEK)	12,714,286
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	28
Less Leakage	30%
Construction Employment Less Leakage	20
Less Displacement	5%
Net Direct Employment	19
Economic Multiplier (Type II)	2
Induced and Indirect Employment	17
Total Construction Employment	**36**

Kolmarden

- Opposite we summarise the operational impacts for Kolmarden
- After Liseberg and Grona Lund, Kolmarden has the third highest revenues, totalling SEK 290 million in 2014
- We estimate the total monetary impact of park operations on the regional economy is therefore **SEK 433 million**
- In regards to employment, there are 383 full time equivalents, which translates to a total employment impact of operations of **471**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Kolmarden – operational impacts	
	2014
Net Revenue	
Gross Revenues (SEK)	290,396,000
Less Leakage	15%
Revenues Less Leakage (SEK)	246,836,600
Less Displacement	3%
Net Revenue (SEK)	240,665,685
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	192,532,548
Total Contribution to Regional Economy (SEK)	**433,198,233**
Direct Operational Employment	
Annual Visitors	508,177
Attendance per FTE	1,327
Direct FTE Operational Employment	383
Less Leakage	10%
Operational Employment Less Leakage	345
Less Displacement	3%
Net Direct Employment	336
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	134
Total Employment	**471**

Kolmarden

- Investment in the park over the past five years has equated to SEK 62 million, and we understand there are further plans for significant new expansion
- We estimate that this equates to a monetary impact of approximately **SEK 67 million per annum**
- By our calculations this equates to **174** additional new jobs

Kolmarden – construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	62,000,000
Less Leakage	40%
Construction Costs Less Leakage	37,200,000
Less Displacement	5%
Net Development Cost (SEK)	35,340,000
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	31,806,000
Total Contribution to Regional Economy (SEK)	**67,146,000**
Direct Construction Employment	
Construction Cost (SEK)	62,000,000
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	138
Less Leakage	30%
Construction Employment Less Leakage	96
Less Displacement	5%
Net Direct Employment	92
Economic Multiplier (Type II)	2
Induced and Indirect Employment	82
Total Construction Employment	**174**

Liseberg

- Liseberg in the countries biggest park in terms of attendance and revenues, with total revenues for the park and hotel operation of around SEK 854 million, based on 2013 figures
- We estimate the total monetary impact of park operations on the regional economy is therefore **SEK 1.3 billion**
- In regards to employment, there are 904 full time equivalent employees, which translates to a total employment impact of operations of **1,172**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Liseberg – operational impacts

	2013
Net Revenue	
Gross Revenues (SEK)	854,107,554
Less Leakage	10%
Revenues Less Leakage (SEK)	768,696,799
Less Displacement	3%
Net Revenue (SEK)	749,479,379
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	599,583,503
Total Contribution to Regional Economy (SEK)	**1,349,062,882**
Direct Operational Employment	
Annual Visitors	2,825,000
Attendance per FTE	3,125
Direct FTE Operational Employment	904
Less Leakage	5%
Operational Employment Less Leakage	859
Less Displacement	3%
Net Direct Employment	837
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	335
Total Employment	**1172**

Liseberg

- Liseberg has also seen a huge level of investment over the past few years, with total capital investment averaging nearly SEK 215 million from2010 – 2014, which includes key additions such as Helix (2014) and Rabbit Land,
- We estimate that this equates to a economic impact of approximately **SEK 310 million**
- In terms of jobs created this equates to additional **774** positions

Liseberg – construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	214,400,000
Less Leakage	20%
Construction Costs Less Leakage	171,520,000
Less Displacement	5%
Net Development Cost (SEK)	162,944,000
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	146,649,600
Total Contribution to Regional Economy (SEK)	**309,593,600**
Direct Construction Employment	
Construction Cost (SEK)	214,400,000
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	476
Less Leakage	10%
Construction Employment Less Leakage	429
Less Displacement	5%
Net Direct Employment	407
Economic Multiplier (Type II)	2
Induced and Indirect Employment	367
Total Construction Employment	**774**

Parken Zoo

- Opposite we summarise the operational impacts for Parken Zoo in Eskilstuna
- With a total revenues in 2014 (including on-site accommodation) of SEK 61 million we estimate the total monetary impact of park operations on the regional economy is **SEK 90 million**
- In regards to employment, there are 74 full time equivalents, which translates to a total employment impact of operations of **90**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Parken Zoo – operational impacts	
	2014
Net Revenue	
Gross Revenues (SEK)	60,518,510
Less Leakage	15%
Revenues Less Leakage (SEK)	51,440,733
Less Displacement	3%
Net Revenue (SEK)	50,154,715
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	40,123,772
Total Contribution to Regional Economy (SEK)	**90,278,487**
Direct Operational Employment	
Annual Visitors	200,000
Attendance per FTE	2,719
Direct FTE Operational Employment	74
Less Leakage	10%
Operational Employment Less Leakage	66
Less Displacement	3%
Net Direct Employment	65
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	26
Total Employment	**90**

Parken Zoo

- Despite a difficult coupe of years in terms of attendance, Parken Zoo has seen some solid investment, averaging at around **SEK 14** million per annum
- We estimate that this equates to a monetary impact of approximately **SEK 16 million** to the local economy
- By our calculations this equates to **40** further jobs

Parken Zoo – construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	14,360,000
Less Leakage	40%
Construction Costs Less Leakage	8,616,000
Less Displacement	5%
Net Development Cost (SEK)	8,185,200
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	7,366,680
Total Contribution to Regional Economy (SEK)	**15,551,880**
Direct Construction Employment	
Construction Cost (SEK)	14,360,000
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	32
Less Leakage	30%
Construction Employment Less Leakage	22
Less Displacement	5%
Net Direct Employment	21
Economic Multiplier (Type II)	2
Induced and Indirect Employment	19
Total Construction Employment	**40**

Skara Sommarland

- In the accompanying table we show the operational impacts of Skara Sommarland
- With annual revenues of around SEK 104 million in 2014 we estimate the total monetary impact of park operations on the regional economy equates to **SEK 155 million**
- In regards to employment, there are 75 full time equivalents, which translates to a total employment impact of operations of **92**
- We do not convert the job numbers to a value (i.e. buy multiplying by the average wage) as this would double-count the impact

Skara Sommarland – operational impacts	
	2014
Net Revenue	
Gross Revenues (SEK)	104,441,000
Less Leakage	15%
Revenues Less Leakage (SEK)	88,774,850
Less Displacement	3%
Net Revenue (SEK)	86,555,479
Economic Multiplier (Type II)	1.8
Induced and Indirect Economic Impact(SEK)	69,244,383
Total Contribution to Regional Economy (SEK)	**155,799,862**
Direct Operational Employment	
Annual Visitors	295,147
Attendance per FTE	3,935
Direct FTE Operational Employment	75
Less Leakage	10%
Operational Employment Less Leakage	68
Less Displacement	3%
Net Direct Employment	66
Economic Multiplier (Type II)	1.4
Induced and Indirect Employment	26
Total Employment	**92**

Skara Sommarland

- Investment at Skara Sommarland over the past five years has average at around SEK 15 million, per annum from 2010 - 2014
- We estimate that this equates to a monetary impact to the local economy of approximately **SEK 16 million** per annum
- By our calculations this equates to approximatel**y 42** additional new jobs

Skara Sommarland – construction impacts	
	2014
Direct Construction Costs	
Construction Cost (SEK)	15,000,000
Less Leakage	40%
Construction Costs Less Leakage	9,000,000
Less Displacement	5%
Net Development Cost (SEK)	8,550,000
Economic Multiplier (Type II)	1.9
Induced and Indirect Economic Impact(SEK)	7,695,000
Total Contribution to Regional Economy (SEK)	**16,245,000**
Direct Construction Employment	
Construction Cost (SEK)	15,000,000
Construction Worker GVA per Capita (SEK)	450,000
Total Construction Impact (Man Year Equivalents)	33
Less Leakage	30%
Construction Employment Less Leakage	23
Less Displacement	5%
Net Direct Employment	22
Economic Multiplier (Type II)	2
Induced and Indirect Employment	20
Total Construction Employment	**42**

LDP

Objective Analysis
Creative Thinking

Economic Impact Assessment (EIA) – Tourism Impact

Tourism impact introduction

- As we described at the beginning of this report, the direct, indirect and induced impacts of the park operations and investment in terms of monetary impacts are not the only positive impacts on the local market
- We view tourists which stay overnight in the area as a result of the park's existence as an additional benefit and these are not assumed to be within the our industry multipliers. Of course we would expect there is a degree of double counting within our assessment and this should be acknowledged at this juncture, but we would imagine the overlap is modest and tourism impact is key
- Tourists not only stay in accommodation in nearby towns and villages (as well as in the on-site accommodation which is factored into operational impacts already) but also spend in restaurants, retail and so forth
- Each of the parks under review provided us with an estimate of how many of their visitors are tourists. As we described in the introduction, to simply take this number and multiply it by a spend level is too simplistic, hence we completed a detailed survey of the local accommodation market.
- We should note the management team at each park gave us an estimate of the number of visitors they believe are staying overnight in the area, and in most cases the estimates were fairly accurate. However, in some instances the number of tourists at some of the parks is greater than management believe, possibly because many of these visitors already live with in a two hour drive time from the site and are therefore viewed as residents

Tourism impact introduction

- The eight amusement parks comprising the focus of our research for this project have each been analysed in order to determine their effect on demand for overnight stays. To establish the quantum of supply in each location we have conducted an audit of lodging provision across different categories. These include serviced accommodation (hotels, guesthouses, B&Bs), hostels, campsites (with tent/caravan pitches and cottages/cabins), and private holiday rental properties.
- Interviews were carried out with management representatives from a variety of operators, including non-branded independent accommodation providers as well as brand 'flagged' chain hotels. Research was used to determine the levels of occupancy, average length of stay, double occupancy factors and other market characteristics in order to quantify overall overnight visitor levels, and specifically demand associated primarily with amusement park attendance.
- We also spent time with local Tourism Office representatives in order to acquire additional information, insight and opinion regarding the demand characteristics of different types of local accommodation provision. In addition, information was also obtained about the extent of the wider tourism offer complementing each amusement park, and their combined impact on tourist visitation trends and spending implications.
- The primary research phase of the study has also been supplemented with data research from a number of sources, such as Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Tourism impact observations

- Leisure market demand is heavily concentrated around the summer months, particularly in July during the principal school holidays in Sweden. At these times, the market mix at most hotels switches from being mainly corporate/business driven to one dominated by leisure travellers.
- In contrast, demand at campsites and holiday rental properties is almost entirely leisure market orientated.
- When annualised, occupancy levels at campsites throughout Sweden are low compared to those of hotels and other forms of serviced accommodation, largely as a result of demand being concentrated into a relatively short summer season.
- Whereas hotels can also attract demand during autumn and winter periods (e.g. half term holidays, weekends, Christmas, Easter, etc.), the majority of campsites are more weather-dependent and operate on a seasonal summer-only basis.
- In addition, amusement park related demand associated with campsite visitation can also be modest. This is due to the fact that at the majority of campsites examined, a significant proportion of pitches are rented out on a 'seasonal' basis whereby visitors book space for several weeks on a sole-use basis. This enables frequent weekend or short-break visits to one location, but also results in fewer 'repeat' visits to local attractions and amusement parks.

Astrid Lindgrens Värld

- The accommodation market associated with Astrid Lindgrens Värld is geographically diverse. In addition to on-site lodging facilities at the site, overnight stays generated by the park also occur in and around Vimmerby, Linköping, and Norrköping (at varying levels).
- Operators that attract demand for park-related visitation include lodging products suited to a wide range of budgets. They include branded upper and mid-priced 'chain' hotels; budget brand hotels; independent bed & breakfasts and guest houses; hostels; holiday village/campsites; and private rental accommodation.
- Our research for Astrid Lindgrens Värld incorporates interviews with management representatives from a cross-section of lodging product providers. These include independent operators as well as branded hotel groups such as Scandic, Elite, Best Western, Choice, First, and Sweden Hotels.
- Interviews also took place with Tourism Office representatives to gain further insight into the demand characteristics of other accommodation types, such as holiday village/campsites, hostels, and holiday rental properties.
- A combination of site visits, face-to-face meetings and telephone interviews has also been supplemented with data research from sources including, but not limited to, Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Astrid Lindgrens Värld

ASTRID LINDGRENS VÄRLD	Hotels (Vimmerby)	Other Hotels (Linköping)	Other Hotels (Norrköping)	Other Lodging (e.g. Hostels)	Local Camping (Pitches)	Local Cottages (Lodges/Cabins)	Other Camping (Pitches)	Other Cottages (Lodges/Cabins)	Total
Number of Letting Units	447	1,513	1,345	372	3,114	459	1,729	202	**9,271**
Letting Unit Nights Available	163,155	552,245	490,925	135,780	1,136,610	200,385	631,085	73,730	**3,383,915**
Average Number of Beds per Unit	2.0	2.0	2.0	4.0	4.0	4.0	4.0	4.0	
Bed Nights Available	326,310	1,104,490	981,850	543,120	4,546,440	601,540	2,524,340	294,920	**11,123,010**
Annual Unit Occupancy	48%	58%	51%	40%	18%	20%	18%	20%	
Letting Unit Nights Sold	78,314	320,302	250,372	54,312	204,590	40,077	113,595	14,746	**1,076,308**
Leisure Demand (%)	40%	30%	30%	80%	100%	100%	100%	100%	
Leisure Letting Unit Nights Sold	31,326	96,091	75,112	43,450	204,590	40,077	113,595	14,746	**618,986**
Average Double Occupancy Factor	2.0	2.0	2.0	3.5	3.5	3.5	3.5	3.5	
Leisure Sleeper/Bed Nights	62,652	192,181	150,223	152,074	716,064	140,270	397,584	51,611	**1,862,659**
Other Demand (%)	60%	70%	70%	20%	0%	0%	0%	0%	
Other Unit Nights Sold	46,989	224,211	175,260	10,862	-	-	-	-	**457,323**
Average Double Occupancy Factor	1.1	1.1	1.1	1.1	-	-	-	-	
Other Bed Nights	51688	246633	192786	16294	-	-	-	-	**507,400**
Bed Nights Sold (Total)	**114,339**	**438,814**	**343,009**	**168,367**	**716,064**	**140,290**	**397,584**	**51,611**	**2,370,058**
Primary Park Visitation									
Park-specific (Leisure) Unit Nights (%)	85%	35%	20%	15%	20%	20%	15%	15%	
Park-specific – Unit Nights	26,627	33,632	15,022	8,147	40,918	8,015	17,039	2,212	**151,612**
Park-specific – Bed Nights	53,254	67,263	30,045	28,514	143,213	28,054	59,638	7,742	**417,722**
Leisure Average Length of Stay (nts)	1.5	1.5	1.5	2.5	3.5	3.5	3.5	3.5	
Park-specific Visits (One Visit per Stay)	35,503	44,842	20,030	11,406	40,918	8,015	17,039	2,212	**179,965**
Secondary Park Visitation									
Park-add on – (Other) Unit Nights (%)	1.0%	1.0%	1.0%	1.0%	-	-	-	-	
Park-add on (Other) Unit nights	470	2,242	1,753	543	-	-	-	-	**5.008**
Park-add on – Bed Nights	517	2,466	1,928	815	-	-	-	-	**5,726**
'Other' Average Length of Stay (nts)	1.5	1.5	1.5	2.0	-	-	-	-	
Add-On Park Visits (One per Stay)	345	1,644	1,285	407	-	-	-	-	**3,681**
On-Site Lodging Bed Nights Sold									**56,343**
Total Lodging –driven Park Visitation									**239,989**

Astrid Lindgrens Värld

- Astrid Lindgrens Värld's proximity to Linköping and Norrköping helps to support a growing 'critical mass' of tourist attractions, festivals, and entertainment events in the region that help to drive increased visitation.
- Kolmarden Zoo near Norrköping, together with Astrid Lindgrens Värld represent the region's leading family-orientated visitor attractions. As complementary tourism products they increasingly attract overnight stays in the area.
- In addition, tourism authority initiatives and private sector investment to increase the range and scale of attractions and events locally is resulting in increased booking levels of longer duration, leading to increased tourism spending.

Astrid Lindgrens Värld: Induced Tourism Spend

Overall Park Attendance	Induced Bed Nights (Domestic Market %)	Induced Bed Nights (Domestic Market)	Domestic Market Spend per Head per Day	Total Induced Domestic Market Spend
491,975	60%	143,993	SEK 990	SEK 142,553,070
	Induced Bed Nights (International Market %)	**Induced Bed Nights (International Market)**	**International Market Spend per Head per Day**	**Total Induced International Market Spend**
	40%	95,996	SEK 1,085	SEK 104,155,660
Grand Total Induced Tourist Market Spend				**SEK 246,708,730**

Furuvik

- Lodging market demand associated with Furuvik is accommodated largely by operators in and around Gävle, in addition to the park's own onsite camping facilities. As well as campsites and holiday villages in the wider area, the supply of Gävle city-based accommodation comprises a mix of 2-Star to 4-Star hotel properties, hostels, and bed & breakfast guest houses.
- Most larger hotels are managed by branded operators such as Scandic, Elite, Sweden Hotels, and Choice, whilst larger independent properties are usually members of global marketing consortia such as Best Western.
- Interviews with management representatives from each of these indicate that the market leader, in terms of Furuvik demand absorption, is the Scandic Gävle Väst Hotel, which in 2015's peak summer school holiday month (July) accommodated in excess of 3,000 children, all of whom reportedly were travelling in family groups with the primary purpose of visiting Furuvik.
- Interviews were also undertaken with Tourism Office representatives to gain further insight into the demand characteristics of other accommodation types, such as holiday village/campsites, hostels, and holiday rental properties.
- A combination of site visits, face-to-face meetings and telephone interviews has also been supplemented with data research from sources including, but not limited to, Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Furuvik

FURUVIK	Hotels (Gävle)	Other Hotels (Wider Gävle)	Other Lodging (e.g. Hostels)	Local Camping (Pitches)	Local Cottages (Lodges/Cabins)	Total
Number of Letting Units	1,046	329	87	879	139	**2,480**
Letting Unit Nights Available	381,790	120,085	31,755	320,835	50,735	**905,200**
Bed Nights Available	763,580	240,170	127,020	1,283,340	202,940	**2,617,050**
Annual Unit Occupancy	53%	48%	35%	18%	25%	
Letting Unit Nights Sold	20,2349	57,641	11,114	57,750	12,684	**341,538**
Leisure Demand (%)	25%	20%	80%	100%	100%	
Leisure Letting Unit Nights Sold	50,587	11,528	8,891	57,750	12,684	**141,441**
Average Double Occupancy Factor	2.0	2.0	3.5	3.5	3.5	
Leisure Sleeper/Bed Nights	101,174	23,056	31,120	202,126	38,051	**401,870**
Other Demand (%)	75%	80%	20%	-	-	
Other Unit Nights Sold	151,762	46,113	2,223	-	-	**200,097**
Average Double Occupancy Factor	1.1	1.1	1.1	-	-	
Other Bed Nights	166,938	50,724	3,334	-	-	**220,996**
Bednights Sold (Total)	**268,112**	**73,780**	**34,454**	**202,126**	**44,393**	**622,866**
Primary Park Visitation						
Park-specific (Leisure) Unit Nights (%)	15%	10%	5%	15%	15%	
Park-specific – Unit Nights	7,588	1,153	556	8,663	1,903	**19,862**
Park-specific – Bed Nights	15,176	2,306	1,945	30,319	6,659	**56,405**
Leisure Average Length of Stay (nts)	1.5	1.5	2.5	3.5	3.5	
Park-specific Visits (One Visit per Stay)	10,117	1,537	778	8,663	1,903	**22,998**
Secondary Park Visitation						
Park-add on – (Other) Unit Nights (%)	1.0%	1.0%	1.0%			
Park-add on (Other) Unit nights	1,518	461	111	-	-	
Park-add on – Bed Nights	1,669	507	167	-	-	**2,090**
'Other' Average Length of Stay (nts)	1.5	1.5	1.5	-	-	
Add-On Park Visits (One per Stay)	1,113	338	83	-	-	**2,343**
On-Site Lodging Bed Nights Sold						**8,008**
Total Lodging Market Park Visitation						**32,540**

Furuvik

Induced Tourism Market Spend

- Leisure market visitation to the Gävle area is driven principally by two major attractions. In summer, during the park's operating season, Furuvik is the major driver of leisure market visitation to the area, particularly for families with children.
- In addition, Gävle is also home to the Swedish National Railway Museum, a part government funded enterprise that operates throughout 12 months of the year.
- Weekend entertainment events staged periodically throughout the summer at Furuvik are reported by hotel operators to have helped boost weekend occupancies in particular, and helped to increase the average length of stay in the region during the months when corporate demand is traditionally at its weakest.

Furuvik: Induced Tourism Spend

Overall Park Attendance	Induced Bed Nights (Domestic Market %)	Induced Bed Nights (Domestic Market)	Domestic Market Spend per Head per Day	Total Induced Domestic Market Spend
238,439	94%	30,588	SEK 990	SEK 30,282,120
	Induced Bed Nights (International Market %)	**Induced Bed Nights (International Market)**	**International Market Spend per Head per Day**	**Total Induced International Market Spend**
	6%	1,952	SEK 1,085	SEK 2,117,920
Grand Total Induced Tourist Market Spend				**SEK 32,400,040**

Grona Lund

- Grona Lund's location at the heart of the Swedish capital enables hotels in Stockholm to generate room-night demand derived specifically from amusement park visitors.
- Lodging operations that attract such demand are invariably full-service hotels. Within 1.5 kilometres of Grona Lund the range of hotels extends from independent 2-Star boutique properties to international 5-Star luxury operations. Branded hotels are numerous throughout the city – the Scandic group, for example, will soon have as many as 23 'flagged' properties within the Greater Stockholm area.
- Our research for Grona Lund incorporates interviews with management representatives from several independent and brand operated properties, including Scandic, Radisson, First, Elite, and Best Western.
- Research has also been carried out with local Tourism Office representatives in the city in order to understand the leisure market more fully with regards to the available attractions mix and leisure visitor trends.
- A combination of site visits, face-to-face meetings and telephone interviews has also been supplemented with data research from sources including, but not limited to, Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Grona Lund

Grona Lund	Hotels (Central Stockholm)	Other Hotels (Greater Stockholm)	Total
Number of Letting Units	19,350	32,000	**51,350**
Letting Unit Nights Available293460	7,062,750	1,168,000	**18,742,750**
Average Number of Beds per Unit	2.0	2.0	
Bed Nights Available	586,920	884,760	**4,863,260**
Annual Unit Occupancy	68%	60%	
Letting Unit Nights Sold	117,384	221,190	**493,955**
Leisure Demand (%)	15%	20%	
Leisure Letting Unit Nights Sold	4,802,670	7,008,000	**11,8106,70**
Average Double Occupancy Factor	2.0	2.0	
Leisure Sleeper/Bed Nights	3,361,869	3,924,480	**7286,349**
Other Demand (%)	65%	72%	
Other Unit Nights Sold	3,121,736	5,045,760	**8,167,496**
Average Double Occupancy Factor	1.1	1.1	
Other Bed Nights	3,361,869	5,045,760	**8,167,496**
Bed Nights Sold (Total)	**6,795,778**	**9,474,816**	**16,270,594**
Primary Park Visitation			
Park-specific (Leisure) Unit Nights (%)	5%	3%	
Park-specific – Unit Nights	84,047	57,867	**142,914**
Park-specific – Bed Nights	168,093	117,734	**285,828**
Leisure Average Length of Stay (nts)	1.5	1.5	
Park-specific Visits (One Visit per Stay)	112,062	78,490	**190,552**
Secondary Park Visitation			
Park-add on – (Other) Unit Nights (%)	0%	0%	
Park-add on (Other) Unit nights	-	-	-
Park-add on – Bed Nights	-	-	-
'Other' Average Length of Stay (nts)	-	-	-
Add-On Park Visits (One per Stay)	-	-	-
Total Lodging –driven Park Visitation			**190,552**

Grona Lund

- In percentage terms, the volume of leisure market demand at Stockholm hotels (attracted primarily to visit Grona Lund) is low when compared to other parks in Sweden. Key to this trend is the nature of leisure visitation to Stockholm and the competing appeal of the city's wealth of alternative world class visitor attractions.
- In addition, Grona Lund is relatively unknown amongst the majority of international visitors, compared to Scandinavian parks such as Tivoli Gardens (Copenhagen) or Liseberg (Gothenburg).
- Nevertheless, induced tourism spends per person are typically around 20 percent higher than those associated with Sweden's provincial attractions, due to the higher levels of expenditure incurred by visitation to a 'World' capital city.

Grona Lund: Induced Tourism Spend

Overall Park Attendance	Induced Bed Nights (Domestic Market %)	Induced Bed Nights (Domestic Market)	Domestic Market Spend per Head per Day	Total Induced Domestic Market Spend
1,329,723	83%	158,158	SEK 1,188	SEK 187,891,704
	Induced Bed Nights (International Market %)	Induced Bed Nights (International Market)	International Market Spend per Head per Day	Total Induced International Market Spend
	17%	32,394	SEK 1,302	SEK 42,176,988
Grand Total Induced Tourist Market Spend				SEK 230,068,692

Gustavsvik

- In addition to on-site accommodation at the amusement park, the lodging sector that facilitates overnight stays for visitors to Gustavsvik extends to Örebro city and the surrounding locations of Kumla, Hallsberg and Lekeberg.
- In Örebro, the proximity of the park to the city centre enables both independent and branded hotels to generate roomnight demand from Gustavsvik-specific leisure travellers. Other lodging providers that accommodate park-specific demand are spread more widely throughout the areas around Örebro. They include a larger share of lower and mid-priced bed & breakfast establishments and guest houses, as well as campsites and private rental properties.
- Our research in the Örebro area includes interviews with management representatives from a variety of operators. Sampling has extended to non-branded independent properties and branded chain hotels in the city such as Good Morning hotels (formerly Ibis/Accor), Scandic, Elite, Choice, First, and Best Western.
- We also met with local Tourism Office representatives in order to better understand the markets for other forms of local accommodation (campsites, hostels, holiday rental properties, etc).
- A combination of site visits, face-to-face meetings and telephone interviews has also been supplemented with data research from sources including, but not limited to: Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Gustavsvik

GUSTAVSVIK	Hotels (Örebro)	Other Hotels	Other Lodging (e.g. Hostels)	Local Camping (Pitches)	Local Cottages (Lodges/Cabins)	Total
Number of Letting Units	1,311	138	92	3,356	296	**5,193**
Letting Unit Nights Available	478,515	50,370	33,580	1,224,940	108,040	**1,895,445**
Average Number of Beds per Unit	2.0	2.0	4.0	4.0	4.0	
Bed Nights Available	957,030	100,740	134,320	4,899,760	432,160	**6,524,010**
Annual Unit Occupancy	59%	50%	38%	18%	20%	
Letting Unit Nights Sold	282,324	25,184	12,760	220,489	21,608	**562,366**
Leisure Demand (%)	25%	25%	80%	100%	100%	
Leisure Letting Unit Nights Sold	70,581	6,296	10,208	220,489	21,608	**329,183**
Average Double Occupancy Factor	2.0	2.0	3.5	3.5	3.5	
Leisure Sleeper/Bed Nights	141,162	12,593	35,729	771,712	75,628	**1,036,824**
Other Demand (%)	75%	75%	20%	0%	0%	
Other Unit Nights Sold	211,743	18,889	2,552	-	-	**233,184**
Average Double Occupancy Factor	1.1	1.1	1.5	-	-	
Other Bed Nights	232,917	20,778	3,828	-	-	**257,523**
Bed Nights Sold (Total)	**374,079**	**33,370**	**39,557**	**771,712**	**75,628**	**1,294,347**
Primary Park Visitation						
Park-specific (Leisure) Unit Nights (%)	45%	30%	20%	20%	20%	
Park-specific – Unit Nights	31,761	1,889	2,552	44,098	4,322	**84,622**
Park-specific – Bed Nights	63,523	3,778	8,932	154,342	15,126	**245,701**
Leisure Average Length of Stay (nts)	1.5	1.5	2.5	3.5	3.5	
Park-specific Visits (One Visit per Stay)	42,349	2,519	3,573	44,098	4,322	**96,859**
Secondary Park Visitation						
Park-add on – (Other) Unit Nights (%)	1.0%	1.0%	1.0%	-	-	
Park-add on (Other) Unit nights	2,117	189	128	-	-	**2,434**
Park-add on – Bed Nights	2,329	208	191	-	-	**2,728**
'Other' Average Length of Stay (nts)	1.5	1.5	2.0	-	-	
Add-On Park Visits (One per Stay)	1,553	139	96	-	-	**1,787**
On-Site Lodging Bed Nights Sold						**31,119**
Total Lodging –driven Park Visitation						**129,765**

Gustavsvik

- Leisure demand in and around Örebro exhibits two distinct orientations. The first includes 'destination' visitors to the area's attractions (Gustavsvik, Örebro castle, shopping facilities, etc.). The second is composed of 'transit' visitors (mainly tour groups) en-route from Oslo to Stockholm and vice versa (late arrival / early departure). The induced spend amongst transit travellers is minimal, relative to that of longer-staying, higher-spending destination visitors.
- Summer season weather can also significantly affect leisure market visitor numbers, 2015's poor summer weather having helped to "keep people off the beaches" and boost travel to and expenditure within locations/attractions in and around Örebro.

Gustavsvik: Induced Tourism Spend				
Overall Park Attendance	**Induced Bed Nights (Domestic Market %)**	**Induced Bed Nights (Domestic Market)**	**Domestic Market Spend per Head per Day**	**Total Induced Domestic Market Spend**
380,833	67%	86,943	SEK 990	SEK 86,073,570
	Induced Bed Nights (International Market %)	**Induced Bed Nights (International Market)**	**International Market Spend per Head per Day**	**Total Induced International Market Spend**
	33%	42,823	SEK 1,085	SEK 46,462,955
Grand Total Induced Tourist Market Spend				**SEK 132,356,525**

Kolmarden

- The supply of accommodation that generates demand associated with Kolmarden is similar to that of Astrid Lindgrens Värld in terms of its geographic spread. As well as the quality lodging facilities at the site itself, overnight stays generated by the park also occur in and around Norrköping and further afield in Linköping.
- Lodging products locally are geared to a range of budgets. They include branded upper and mid-priced ‘chain’ hotels; budget brand hotels; independent bed & breakfasts and guest houses; hostels; holiday village/campsites; and private rental accommodation.
- Our Kolmarden research incorporates interviews with management representatives from a cross-section of lodging product providers. These include independent operators and branded ‘group’ hotels such as Scandic, Elite, Choice, Best Western, First, and Sweden Hotels.
- Interviews were also undertaken with Tourism Office representatives, both in Norrköping and Linköping in order to understand the demand characteristics of other accommodation types, such as holiday village/campsites, hostels, and holiday rental properties.
- A combination of site visits, face-to-face meetings and telephone interviews has also been supplemented with data research from sources including, but not limited to, Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Kolmarden

Kolmarden	Hotels (Norrköping)	Other Hotels (Linköping)	Other Lodging (e.g. Hostels)	Local Camping (Pitches)	Local Cottages (Lodges/Cabins)	Other Camping (Pitches)	Other Cottages (Lodges/Cabins)	Total
Number of Letting Units	1,405	1,513	352	1,729	202	780	140	**6,121**
Letting Unit Nights Available	512,825	552,245	128,480	631,085	73,730	284,700	51,100	**2,234,165**
Average Number of Beds per Unit	2.0	2.0	4.0	4.0	4.0	4.0	4.0	
Bed Nights Available	1,025,650	1,104,490	513,920	2,524,340	294,920	1,138,800	204,400	**6,806,520**
Annual Unit Occupancy	51%	58%	40%	18%	25%	18%	25%	
Letting Unit Nights Sold	261,541	320,302	51,392	113,595	18,433	51,246	12,775	**829,284**
Leisure Demand (%)	30%	30%	80%	100%	100%	100%	100%	
Leisure Letting Unit Nights Sold	78,462	96,091	41,114	113,595	18,433	51,246	12,775	**411,715**
Average Double Occupancy Factor	2.0	2.0	3.5	3.5	3.5	3.5	3.5	
Leisure Sleeper/Bed Nights	156,924	192,181	143,898	397,584	64,514	179,361	44,713	**1,179,174**
Other Demand (%)	70%	70%	20%	0%	0%	0%	0%	
Other Unit Nights Sold	183,079	224,211	10,278	-	-	-	-	**417,568**
Average Double Occupancy Factor	1.1	1.1	1.1	-	-	-	-	
Other Bed Nights	201,386	246,633	15,418	-	-	-	-	**463,437**
Bed Nights Sold (Total)								
Primary Park Visitation								
Park-specific (Leisure) Unit Nights (%)	45%	25%	15%	20%	20%	15%	15%	
Park-specific – Unit Nights	35,308	24,023	7,709	22,719	3,687	7,687	1,916	**103,048**
Park-specific – Bed Nights	70,616	48,045	26,981	79,517	12,903	26,904	6,707	**271,673**
Leisure Average Length of Stay (nts)	1.5	1.5	2.5	3.5	3.5	3.5	3.5	
Park-specific Visits (One Visit per Stay)	47,077	32,030	10,792	22,719	3,687	7,687	1,916	**125,909**
Secondary Park Visitation								
Park-add on – (Other) Unit Nights (%)	1.0%	1.0%	1.0%	-	-	-	-	
Park-add on (Other) Unit nights	1,831	2,242	514	-	-	-	-	**4,587**
Park-add on – Bed Nights	2,014	2,466	771	-	-	-	-	**5,251**
'Other' Average Length of Stay (nts)	1.5	1.5	2.0	-	-	-	-	
Add-On Park Visits (One per Stay)	1,343	1,644	385	-	-	-	-	**3,372**
On-Site Lodging Bed Nights Sold								**95,665**
Total Lodging –driven Park Visitation								**224,946**

Kolmarden

- Kolmarden's recently enhanced facilities and proximity to Norrköping and Linköping support an expanding 'critical mass' of local leisure market attributes. Consequently, the mix of tourist attractions, festivals, and entertainment events are driving increased visitation.
- Kolmarden, together with Astrid Lindgrens Värld in Vimmerby, represent leading family-orientated visitor attractions. As complementary tourism products they increasingly attract overnight stays in the area.
- In addition, tourism authority initiatives and private sector investment to increase the range and scale of attractions and events locally is resulting in increased booking levels of longer duration, leading to increased tourism spending.

Kolmarden: Induced Tourism Spend				
Overall Park Attendance	**Induced Bed Nights (Domestic Market %)**	**Induced Bed Nights (Domestic Market)**	**Domestic Market Spend per Head per Day**	**Total Induced Domestic Market Spend**
508,177	60%	134,967	SEK 990	SEK 133,617,330
	Induced Bed Nights (International Market %)	**Induced Bed Nights (International Market)**	**International Market Spend per Head per Day**	**Total Induced International Market Spend**
	40%	89,978	SEK 1,085	SEK 97,626,130
Grand Total Induced Tourist Market Spend				**SEK 231,243,460**

Liseberg

- Liseberg's world renowned attributes and historic pedigree, together with a location in the heart of Gothenburg, have made the park a key driver of accommodation demand throughout Sweden's 'second city'.
- High profile 'in-park' attractions such as the recently inaugurated 'Helix' roller coaster, and an expanding programme of 'out of season' openings during traditional holiday periods (e.g. Christmas and Halloween) have helped to maintain the park at the forefront of the city's principal tourism offers.
- Liseberg also benefits from the reputation and associated 'pulling power' of Gothenburg as a major domestic and international host city for sporting events, entertainment events, and large scale convention events.
- Lodging operations that accommodate Liseberg related visitor demand largely comprise traditional hotel properties. Our research for Liseberg includes interviews with management representatives, not only of the park's own hotel operation, but also several of the city's leading hostelries. These include branded operations such as Scandic, Radisson, First, Elite, Choice and Best Western.
- A combination of site visits and face-to-face meetings has also been supplemented with data research from sources including, but not limited to, Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Liseberg

LISEBERG	Local Hotels (Central Gothenburg)	Gothenburg Hotels (Wider Market)	Total
Number of Letting Units	5,689	6,360	**12,228**
Letting Unit Nights Available293460	2,076,485	2,321,400	**4,463,220**
Average Number of Beds per Unit	2.0	2.0	
Bed Nights Available	4,152,970	4,642,800	**8,926,440**
Annual Unit Occupancy	67%	63%	**65%**
Letting Unit Nights Sold	1,391,245	1,462,482	**2,900,768**
Leisure Demand (%)	35%	35%	
Leisure Letting Unit Nights Sold	486,936	511,869	**1,027,970**
Average Double Occupancy Factor	2.0	2.0	
Leisure Sleeper/Bed Nights			
Other Demand (%)	65%	65%	
Other Unit Nights Sold	904,309	950,613	**1,872,798**
Average Double Occupancy Factor	1.2	1.2	
Other Bed Nights	1,085,171	1,140,736	**2,247,358**
Bed Nights Sold (Total)	**2,010,349**	**2,113,286**	**4,200,501**
Primary Park Visitation			
Park-specific (Leisure) Unit Nights (%)	25%	15%	
Park-specific – Unit Nights	347,811	219,372	**596,349**
Park-specific – Bed Nights	695,622	438,745	**1,192,698**
Leisure Average Length of Stay (nts)	1.6	1.6	
Park-specific Visits (One Visit per Stay)	434,764	274,215	**745,436**
Secondary Park Visitation			
Park-add on – (Other) Unit Nights (%)	1.2%	1.2%	
Park-add on (Other) Unit nights	83,475	73,124	**159,421**
Park-add on – Bed Nights	100,170	87,749	**191,306**
'Other' Average Length of Stay (nts)	1.2	1.2	
Add-On Park Visits (One per Stay)	83,475	73,124	**159,421**
Liseberg Hotel Bed Nights Sold			**39,279**
Total Lodging –driven Park Visitation			**904,858**

Liseberg

- Although domestic demand associated with Liseberg makes up the majority of 'induced' tourism spending, the international market at almost 30 percent of bed nights sold is nonetheless particularly significant in economic terms.
- Like Stockholm, the spend per head per day in Gothenburg is on average 20 percent higher than that of provincial amusement park locations in Sweden, due to the higher expenditure associated with the country's 'second city' status.
- As a result, with approaching a million directly generated tourist bednights, the overall induced tourist spend (per head) revenue associated with Liseberg amusement park operations amounts to in excess of SEK 1 billion annually.

Liseberg: Induced Tourism Spend

Overall Park Attendance	Induced Bed Nights (Domestic Market %)	Induced Bed Nights (Domestic Market)	Domestic Market Spend per Head per Day	Total Induced Domestic Market Spend
2,825,000	71%	642,449	SEK 1,188	SEK 763,229,412
	Induced Bed Nights (International Market %)	Induced Bed Nights (International Market)	International Market Spend per Head per Day	Total Induced International Market Spend
	29%	262,409	SEK 1,302	SEK 341,656,518
Grand Total Induced Tourist Market Spend				**SEK 1,104,885,930**

Parken Zoo

- As well as on-site provision for overnight stays, accommodation demand associated with visits to Parken Zoo is generated in Eskilstuna and the areas surrounding the city. Park-driven demand also extends to the larger conurbation of Västerås. Eskilstuna city comprises a predominantly corporate business-driven hotel market, with relatively limited leisure tourist appeal other than for its principal attraction, Parken Zoo. Consequently, local lodging facilities that are geared more towards leisure demand are situated in the wider environs that surround Eskilstuna.
- Eskilstuna is also notable for its low levels of lodging market occupancy, relative to neighbouring Västerås.
- Research in the Eskilstuna and Västerås areas incorporates meetings with management representatives from a variety of operators including hotel groups such as Elite, Choice, Best Western, First, and Scandic.
- Interviews were also undertaken with Tourism Office representatives to gain further insight into the demand characteristics of other accommodation types, such as holiday village/campsites, hostels, and holiday rental properties.
- A combination of site visits, face-to-face meetings and telephone interviews has also been supplemented with data research from sources including, but not limited to, Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Parken Zoo

PARKEN ZOO	Hotels (Eskilstuna)	Other Hotels (e.g. Västerås)	Other Lodging (e.g. Hostels)	Local Camping (Pitches)	Local Cottages (Lodges/Cabins)	Total
Number of Letting Units	804	1,212	16	2,065	242	**4,339**
Letting Unit Nights Available293460	293,460	442,380	5,840	753,725	88,330	**1,583,735**
Average Number of Beds per Unit	2.0	2.0	4.0	4.0	4.0	
Bed Nights Available	586,920	884,760	23,360	3,014,900	353,320	**4,863,260**
Annual Unit Occupancy	40%	50%	35%	18%	20%	
Letting Unit Nights Sold	117,384	221,190	2,044	135,671	17,666	**493,955**
Leisure Demand (%)	15%	20%	80%	100%	100%	
Leisure Letting Unit Nights Sold	17,608	44,238	1,635	135,671	17,666	**216,817**
Average Double Occupancy Factor	2.0	2.0	3.5	3.5	3.5	
Leisure Sleeper/Bed Nights	35,215	88,476	5,723	474,847	61,831	**666,092**
Other Demand (%)	85%	85%	20%	0%	0%	
Other Unit Nights Sold	99,776	188,012	409	-	-	**288,197**
Average Double Occupancy Factor	1.1	1.1	1.5	-	-	
Other Bed Nights	109,754	206,813	613	-	-	**317,180**
Bed Nights Sold (Total)	**144,969**	**295,289**	**6,336**	**474,847**	**61,831**	**983,272**
Primary Park Visitation						
Park-specific (Leisure) Unit Nights (%)	20%	5%	15%	10%	10%	
Park-specific – Unit Nights	3,522	2,212	307	13,567	1,767	**21,374**
Park-specific – Bed Nights	7,043	4,424	1,073	47,485	6,183	**66,208**
Leisure Average Length of Stay (nts)	1.5	1.5	2.5	3.5	3.5	
Park-specific Visits (One Visit per Stay)	4,695	2,949	429	13,567	1,767	**23,407**
Secondary Park Visitation						
Park-add on – (Other) Unit Nights (%)	1.0%	1.0%	1.0%	-	-	
Park-add on (Other) Unit nights	998	1,770	20	-	-	**2,788**
Park-add on – Bed Nights	1,098	1,946	31	-	-	**3,075**
'Other' Average Length of Stay (nts)	1.5	1.5	2.5	-	-	
Add-On Park Visits (One per Stay)	732	1,298	12	-	-	**2,042**
On-Site Lodging Unit Nights Sold						**17,082**
Total Lodging –driven Park Visitation						**42,531**

Parken Zoo

- Parken Zoo is the area's principal summer attraction for families with children. Additional leisure market appeal is generated by the city's shopping facilities, ad hoc sporting events, and to a lesser extent the Munktell Museum of industrial machine history (part of the Volvo Construction Equipment plant in Eskilstuna).
- However, the area is largely a corporate-driven accommodation market that experiences relatively low overall annual occupancies, particularly within the serviced accommodation sector (hotels, B&Bs, guest houses, etc.).
- Corresponding leisure market demand is also modest, resulting in inhibited induced tourism spend potential.

Parken Zoo: Induced Tourism Spend

Overall Park Attendance	Induced Bed Nights (Domestic Market %)	Induced Bed Nights (Domestic Market)	Domestic Market Spend per Head per Day	Total Induced Domestic Market Spend
200,000	91%	38,703	SEK 990	SEK 38,315,970
	Induced Bed Nights (International Market %)	**Induced Bed Nights (International Market)**	**International Market Spend per Head per Day**	**Total Induced International Market Spend**
	9%	3,828	SEK 1,085	SEK 4,153,380
Grand Total Induced Tourist Market Spend				**SEK 42,469,350**

Skara Sommarland

- Skara Sommarland generates lodging sector demand predominantly in and around both Skara and Skövde in addition to on-site accommodation at the amusement park itself.
- A mixture of independent and branded hotels generate roomnight demand from Skara Sommarland-specific leisure travellers. Other lodging providers that accommodate park-specific demand are spread more widely throughout the area around the park and include lower and mid-priced bed & breakfast establishments, guest houses, campsites and private rental properties.
- Our research in the Skara-Skövde area includes interviews with management representatives from a variety of operators. Sampling has extended to non-branded independent properties and branded chain hotels, including Scandic, Choice, First, Sweden Hotels, and Best Western.
- We also contacted local Tourism Office representatives to gauge the demand characteristics of other types of local accommodation provision such as, holiday village/campsites, hostels, and the private holiday rental property market.
- A combination of site visits, face-to-face meetings and telephone interviews has also been supplemented with data research from sources including, but not limited to: Statistics Sweden, Benchmarking Alliance, Camping.se, Tillväxt Verket, and The Swedish Trade and Invest Council.

Skara Sommarland

SKARA SOMMARLAND	Hotels (Skara)	Other Hotels (Skövde)	Other Lodging (e.g. Hostels)	Camping (Pitches)	Cottages (Lodges/Cabins)	Total
Number of Letting Units	261	671	31	2,677	325	**3,965**
Letting Unit Nights Available	95,265	244,915	11,315	977,105	118,625	**1,447,225**
Average Number of Beds per Unit	2.0	2.0	4.0	4.0	4.0	
Bed Nights Available	190,530	489,830	45,260	3,908,420	474,500	**5,108,540**
Annual Unit Occupancy	46%	46%	40%	18%	25%	
Letting Unit Nights Sold	43,822	112,661	4,523	175,679	29,656	**366,544**
Leisure Demand (%)	30%	30%	80%	100%	100%	
Leisure Letting Unit Nights Sold	13,147	33,798	3,621	175,879	29,656	**256,101**
Average Double Occupancy Factor	2.0	2.0	3.5	3.5	3.5	
Leisure Sleeper/Bed Nights	26,293	67,597	12,673	615,573	103,797	**825,936**
Other Demand (%)	70%	70%	20%	0%	0%	
Other Unit Nights Sold	30,675	78,863	905	-	-	
Average Double Occupancy Factor	1.1	1.1	1.5	-	-	
Other Bed Nights	33,743	86,749	1,358	-	-	**121,850**
Bed Nights Sold (Total)						
Primary Park Visitation						
Park-specific (Leisure) Unit Nights (%)	55%	50%	20%	20%	20%	
Park-specific – Unit Nights	7,231	16,899	905	35,176	5,931	**66,142**
Park-specific – Bed Nights	14,461	33,798	3,168	123,115	20,759	**195,302**
Leisure Average Length of Stay (nts)	1.5	1.5	2.5	3.5	3.5	
Park-specific Visits (One Visit per Stay)	9,641	22,532	1,267	35,176	5,931	**74,547**
Secondary Park Visitation						
Park-add on – (Other) Unit Nights (%)	1.0%	1.0%	1.0%	-	-	
Park-add on (Other) Unit nights	307	789	45	-	-	**1,141**
Park-add on – Bed Nights	337	867	68	-	-	**1,273**
'Other' Average Length of Stay (nts)	1.5	1.5	2.0	-	-	
Add-On Park Visits (One per Stay)	225	578	34	-	-	**837**
On-Site Lodging Unit Nights Sold						**37,309**
Total Lodging –driven Park Visitation						**112,694**

Skara Sommarland

- Skara Sommarland is the area's principal summer season leisure facility for families with children. In addition, however, the wider area also benefits from an extensive range of leisure facilities, cultural attractions, and events that are promoted by the local tourist offices in Skara and Skövde.
- As a result, the region has a well-developed leisure destination identity with strong cross-market appeal amongst differing age groups and tourism tastes.
- Tourism authority initiatives and private sector investment to increase the range and scale of attractions and events locally is helping to increase booking levels and boost overall tourism spending.

Skara Sommarland: Induced Tourism Spend

Overall Park Attendance	Induced Bed Nights (Domestic Market %)	Induced Bed Nights (Domestic Market)	Domestic Market Spend per Head per Day	Total Induced Domestic Market Spend
508,177	75%	84,520	SEK 990	SEK 83,674,800
	Induced Bed Nights (International Market %)	**Induced Bed Nights (International Market)**	**International Market Spend per Head per Day**	**Total Induced International Market Spend**
	25%	28,173	SEK 1,085	SEK 30,567,705
Grand Total Induced Tourist Market Spend				**SEK 114,242,505**

LDP

Objective Analysis
Creative Thinking

Economic Impact Assessment (EIA) – Summary of Impacts

Summary of impacts - operations

- The table below shows a summary of the economic impacts of the parks that are driven by the annual operations, both in terms of the monetary impacts of the parks on the economy and the number of total jobs attributable to the parks
- Even the smaller parks contribute around SEK 90 million to the local economies, with Liseberg contributing SEK 1.3 billion to the Gothenburg economy
- We should note that these are economic impacts on the local areas, and as such we have factored in varying degrees of leakage (to other parts of Sweden and overseas) – if we were to look at the additive impact of the parks on Swedish parks, then some of this leakage would be factored back in

Summary of operational impacts		
	Annual operational employment (employees)	Annual monetary impact (value, in SEK)
Astrid Lindgrens Värld	168	255,884,386
Furuvik	76	113,977,159
Grona Lund	497	679,093,389
Gustavsvik	70	89,506,492
Kolmarden	471	433,198,233
Liseberg	1172	1,349,062,882
Parken Zoo	90	90,278,487
Skara Sommarland	92	155,799,862

Summary of impacts - investment

- The importance of investment in the parks should not be understated. By having strong levels of park investment (as highlighted in our benchmarking assessment earlier) this has an additional impact on the local economy in terms of monetary impact and jobs
- Whilst not as great clearly as the operational impacts, the numbers are still impressive, particularly as a result of the levels of investment
- Again we have factored a fair bit of leakage into the figures (particularly in the parks not located in large urban areas), a lot of which, if we were looking at the cumulative impact on Sweden, would be factored back in to the numbers

Summary of investment / construction impacts		
	Annual construction employment (employees)	Annual monetary construction impact (value, in SEK)
Astrid Lindgrens Värld	92	35,375,001
Furuvik	42	16,245,000
Grona Lund	162	64,980,000
Gustavsvik	36	13,769,571
Kolmarden	174	67,146,000
Liseberg	774	309,593,600
Parken Zoo	40	15,551,880
Skara Sommarland	42	16,245,000

Summary of impacts - tourism

- Below summarises the impact on tourism of each of the parks, split by domestic and international visits, and the implied monetary impact
- The impact on tourism is considerable. At some locations (Astrid Lindgrens World, Kolmarden and Gustavsik in particular are worth a mention) the local accommodation markets rely quite heavily on the presence of the park
- The greatest impact on tourism is at Liseberg where the park directly contributes about SEK 1.1 billion to the local economy through direct tourism spend

Summary of tourism impacts

	Induced Bed Nights (Domestic Market)	Induced Bed Nights (International Market)	Tourist monetary impact (value, in SEK)
Astrid Lindgrens Värld	143,993	95,996	246,708,730
Furuvik	30,588	1,952	32,400,040
Grona Lund	158,158	32,394	230,068,692
Gustavsvik	86,943	42,823	132,356,525
Kolmarden	134,967	89,978	231,243,460
Liseberg	642,449	262,409	1,104,885,930
Parken Zoo	38,703	3,828	42,469,350
Skara Sommarland	84,520	28,173	114,242,505

Total impact of each park

- The table below shows a summary of the total economic impacts that are driven by the annual operations, annual investment and through tourism
- The numbers are significant, particularly when taken in the context of some of the smaller markets, and highlight the importance of each and every one of the assets to their local markets
- Whilst impact assessments are more illustrative rather than a precise science, we feel these figures a clear indication of the total impacts and we believe it is fair to view the jobs and monetary impacts as additive

Summary of total impacts

	Annual operational employment (employees)	Annual monetary impact (value, in SEK)	Annual construction employment (employees)	Annual monetary construction impact (value, in SEK)	Induced tourism (bed nights)	Tourist monetary impact (value, in SEK)
Astrid Lindgrens Värld	168	255,884,386	92	35,375,001	239,989	246,708,730
Furuvik	76	113,977,159	42	16,245,000	32,540	32,400,040
Grona Lund	497	679,093,389	162	64,980,000	190,552	230,068,692
Gustavsvik	70	89,506,492	36	13,769,571	129,766	132,356,525
Kolmarden	471	433,198,233	174	67,146,000	224,945	231,243,460
Liseberg	1172	1,349,062,882	774	309,593,600	904,858	1,104,885,930
Parken Zoo	90	90,278,487	40	15,551,880	42,531	42,469,350
Skara Sommarland	92	155,799,862	42	16,245,000	112,693	114,242,505

Combined impact of each park

- The final table summarises the total employment impact (from operations and annual investment), total number of induced tourists, and total monetary impact (from operations, annual investment and tourism spend)
- As shown the combined impacts are considerable, with Liseberg and Grona Lund driving total monetary impacts of SEK 2.7 billion and SEK 1.0 billion respectively. For the group (Swedish Parks Association) the total impact on the economy is c. SEK 5.8 billion. All these impacts are of course in addition to the importance to the impact each park has on the image of each area and the importance as a source of entertainment

Summary of tourism impacts

	Total employment impact	Total induced tourists	Total monetary impact (SEK)
Astrid Lindgrens Värld	260	239,989	537,968,117
Furuvik	118	32,540	162,622,199
Grona Lund	659	190,552	974,142,081
Gustavsvik	106	129,766	235,632,588
Kolmarden	645	224,945	731,587,693
Liseberg	1,946	904,858	2,763,542,412
Parken Zoo	131	42,531	148,299,717
Skara Sommarland	134	112,693	286,287,367
Total impact of all parks	**3,999**	**1,877,874**	**5,840,082,173**

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