

## **Chapter 1: Executive Summary**

### Scope and Methodology

- Scope of coverage

### Methodology

- Consumer survey methodology

- Market size and forecast

- Other sources

- Restaurant categories

- Limited-service restaurant definitions

- Full-service restaurant definitions

- Other definitions

### Amusement Park Foodservice Market Size and Forecast

### Amusement Park Foodservice Revenue Drivers

### Insight Capsule

### Amusement Park Menu & Food Trends

- Insight Capsule

### Amusement Park Attendance Trends: Demographic Analysis

- Insight Capsule

- Fast Facts

### Amusement Park Visitor Restaurant Usage

- Insight Capsule

### The Amusement Park Visit: Companion & Travel Analysis

- Insight Capsule

### The Amusement Park Visit: BYO and Park Spending Analysis

- Insight capsule

### Amusement Park Operator Foodservice Analyses

## **Chapter 2: Amusement Park Foodservice Market Size and Forecast Market size and forecast summary**

### Attendance on the upswing

For amusement parks, food is big business

- Walt Disney foodservice revenue higher than next four amusement park operators combined

Table 2-1: Foodservice Revenue, Top Five Amusement Park Operators, 2011

Market size estimate

Graph 2-1: Amusement Park Foodservice Revenue, 2007-2014

## **Chapter 3: Amusement Park Foodservice Revenue Drivers**

### **Overview**

### **Economic forecast through 2014**

GDP: A long time getting back, but finally passes pre-recession levels

- Forecast factors

- On a positive note

- On a negative note

- The projections

Graph 3-1: Unemployment, GDP & Inflation Forecast, 2012, 2013, 2014 & Longer Term

Consumer confidence showing signs of mending

Graph 3-2: Unemployment Rate, Savings Rate & Consumer Confidence, 2007-2012

Unemployment remains high but is tapering downward

- Demographic analysis

Amusement park foodservice consequences

- Promotional activity should continue

Graph 3-3: Monthly Unemployment Trends, Younger Age Groups, by Demographic: 2007-2012

Graph 3-4: Personal Income and Spending Trends, 2007-2011

- Spending on recreational services outpaces overall consumer spending

Graph 3-5: Personal Spending on Recreational Services, 2007-2011

Travel and tourism spending

- Tourism spending

Travel spending and volume to moderate in 2012 and beyond

- Government forecast calls for even higher growth international travel to U.S.

Table 3-1: U.S. Travel Historical Expenditures and Forecast, 2007-2014

Hotel travel trends

- Destination resort relevance

Table 3-2: Hotel/Lodging Use by Miles Travelled to Amusement Park, 2011

- Amusement parks as hotel operators

Hotel industry upswing

Table 3-3: Monthly Hotel Room Occupancy Rates and Revenue by Quarter, 2009-2011

- Positive forecast

Table 3-4: U.S. Monthly Hotel Room Occupancy and Rate Outlook, 2012-13

- Attendance passes pre-recession levels

Table 3-5: Theme Park Attendance, Top 20 Theme Parks, 2007-2010

Theme park operator attendance trends

Table 3-6: Theme Park Attendance: Top 20 Theme Parks by Theme Park Owner, 2007-2010

## **Chapter 4: Amusement Park Menu & Food Trends**

### **Overview**

Ticket pricing trends

- Price hikes

- Incenting longer stays to trigger additional in-park spending

- Busch Entertainment

- Walt Disney World

- Universal Hollywood

- Six Flags' multi-year approach to improving ticket yield

Meal promotions

- Six Flags

- Universal Studios Orlando

- Busch Gardens' all-day dining deal

If you're looking to eat healthy, go somewhere else

- Pack a lunch

- Is that the dietician crying?

- Noah's Ark: deep-fried foods are a mainstay

- Deep-fried Twinkies and Oreos

- Healthy foods are offered

Amusement park staples

- Ice cream

- Finger foods

- Pizza

Rules to live by

- Keep it simple—and prepare it quickly

- Make it portable

- Tried and true favorites

Food relevance

- Epcot foodservice at center stage

- Walt Disney World Swan and the Walt Disney World Dolphin

- Universal Orlando

Price sensitivity means enhancing food value

- Kalahari Resort responds with combo meals

- Water World mixes combo meal with ample signage

- Splish Splash offers size variations

- Water Park of America offers build-your-own options & mini-sizing

Entertainment districts

- California Marketplace

- CityWalk Orlando

- Downtown Disney

Branded food options

- In the park, Disney pulls Houdini on national brands

- But food retail brands are prominently displayed

## **Chapter 5: Amusement Park Attendance Trends: Demographic Analysis**

### **Demographic analysis: Amusement park attendance trends**

Amusement park attendance on the upswing

- Led by racial/ethnic minority groups and lower- and upper-income consumers

Table 5-1: Amusement Park Visitation Trends: Key Demographics, 2008-11

### **Destination & regional amusement park attendance trends**

Slight shift to regional parks and away from destination parks

Demographic analysis: Destination park attendance trends

Table 5-2: Destination Amusement Park Visitation Trends: Key Demographics, 2008-11  
Demographic analysis: Regional park attendance trends  
Table 5-3: Regional Amusement Park Visitation Trends: Key Demographics, 2008-11

### **Demographic analysis: Visitor geographic distribution analysis: California parks**

Table 5-4: Major California Amusement Parks, Visitor Geographic Distribution Analysis, 2011  
Table 5-5: Major Florida Amusement Parks, Visitor Geographic Distribution Analysis, 2011  
Table 5-6: Major Ohio Amusement Parks: Visitor Geographic Distribution Analysis, 2011

### **Demographic analysis: Attendance trends at major amusement parks**

Disneyland

Table 5-7: Disneyland Visitation Trends: Key Demographics, 2008-11

Disneyworld: Animal Kingdom

Table 5-8: Disneyworld Animal Kingdom Visitation Trends: Key Demographics, 2008-11

Disneyworld: Epcot Center

Table 5-9: Disneyworld Epcot Center Visitation Trends: Key Demographics, 2008-11

Disneyworld: Magic Kingdom

Table 5-10: Disneyworld Magic Kingdom Visitation Trends: Key Demographics, 2008-11

Universal Studios Hollywood

Table 5-11: Universal Studios Hollywood Visitation Trends: Key Demographics, 2008-11

Universal Studios Orlando

Table 5-12: Universal Studios Orlando Visitation Trends: Key Demographics, 2008-11

Universal Studios Islands of Adventure

Table 5-13: Universal Studios Islands of Adventure

Visitation Trends: Key Demographics, 2008-11

Busch Gardens, Tampa

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SeaWorld

Table 5-15: SeaWorld Visitation Trends: Key Demographics, 2008-11

Knott's Berry Farm

Table 5-16: Knott's Berry Farm Visitation Trends: Key Demographics, 2008-11

Six Flags

Table 5-17: Six Flags Visitation Trends: Key Demographics, 2008-11

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### **Demographic analysis: restaurant usage among amusement park visitors**

Serve up the restaurant fare

Table 6-1: Theme Park Visitors: Restaurant Usage and Frequency of Use,  
by Restaurant Type, 2011

Disneyland & Disneyworld

Table 6-2: Disneyland & Disneyworld Visitors: Restaurant Usage and Frequency of Use,  
by Restaurant Type, 2011

Universal Studios & Islands of Adventure

Table 6-3: Universal Studios & Islands of Adventure Visitors:  
Restaurant Usage and Frequency of Use, by Restaurant Type, 2011

Busch Gardens & SeaWorld

Table 6-4: Busch Gardens & SeaWorld:  
Restaurant Usage and Frequency of Use, by Restaurant Type, 2011

Regional theme parks

Table 6-5: Regional Theme Park Visitors: Restaurant Usage and Frequency of Use, by  
Restaurant Type, 2011

## **Chapter 7: The Amusement Park Visit: Companion & Travel Analysis**

### **The amusement park visit: Companion & travel analysis**

Not a solitary endeavor

What it means for amusement park foodservice

Family companionship

What it means for amusement park foodservice

Bring the kids is the norm

What it means for amusement park foodservice

A local endeavor

What it means for amusement park foodservice

Load up the car

What it means for amusement park foodservice

Table 7-1: Amusement Park Visitors: Companion Analysis, Distance Travelled, Transportation  
Choice & Lodging Choice, 2011

Age analysis

Table 7-2: Theme Park Visitors: Party Size, Family Members Present, Children Present,  
Distance Travelled, Travel Method & Lodging Choice, by Age, 2011

HH income analysis

Table 7-3: Theme Park Visitors: Party Size, Family Members Present, Children Present,  
Distance Travelled, Travel Method & Lodging Choice, by HH Income, 2011

Race/ethnicity analysis

Table 7-4: Theme Park Visitors: Party Size, Family Members Present, Children Present,  
Distance Travelled, Travel Method & Lodging Choice, by Race/Ethnicity, 2011

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### **The amusement park visit: BYO food and beverage**

BYO usage a strong competitor to in-park foodservice

Table 8-1: Theme Park Visitors: BYO Food & Drink, 2011

Age analysis

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HH income analysis

Table 8-3: Theme Park Visitors: BYO Food & Drink, by HH Income, 2011  
 Parents who bring their children

Table 8-4: Theme Park Visitors: BYO Food & Drink, Parents Bringing Children, 2011  
 Miles travelled

Table 8-5: Theme Park Visitors: BYO Food & Drink, by Miles Travelled to Park, 2011  
 The amusement park visit: ticket, food, beverage, souvenir & parking spend  
 Food and beverage spend is part of the visit

Table 8-6: Theme Park Spending Analysis: Admission Ticket, Souvenirs, Food, Beverages  
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 Spending by HH income

Table 8-7: Theme Park Spending Analysis:  
 Admission Ticket, Souvenirs, Food, Beverages & Parking, 2011  
 Spending by age

Table 8-8: Theme Park Spending Analysis:  
 Admission Ticket, Souvenirs, Food, Beverages & Parking, 2011  
 Spending by parents who bring their children  
 Kids' influence  
 Pester power

Table 8-9: Theme Park Spending Analysis: Admission Ticket, Souvenirs, Food, Beverages  
 & Parking, Parents Bringing Children, 2011  
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Table 8-10: Repeat Visitor Theme Park Spending Analysis: Admission Ticket,  
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 Cedar Fair, L.P.  
 Target audience

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- Hotel facilities
- Marina
- Cedar Point and Soak City: summary of operations
  - Hotel facilities
  - Marinas
  - Cedar Point and Soak City: foodservice
  - Branded chain presence
  - Limited-service variety
  - Full-service in the minority
  - BYO limitations
- Knott's Berry Farm: summary of operations
  - Hotel facilities
  - Area competition
- Knott's Berry Farm: foodservice
  - California Marketplace
  - Weddings encouraged
  - Out-of-park competition
- Other attractions

Sales performance

2009

2010

2011

Table 9-1: Cedar Fair, L.P., Key Metrics, 2007-11

## **Six Flags Entertainment Corporation**

A coaster leader

Cartoon characters provide differentiation

Regional draw among families, adults and teens

Table 9-2: Six Flags Entertainment Corporation, Demographics, 2010

Positive and improving guest satisfaction

Table 9-3: Six Flags Entertainment Corporation, Guest Satisfaction, 2006-2010

The parks

Table 9-4: Six Flags Entertainment Corporation, Park Profiles

Marketing and promotion

Honing the strategy

Group sales

Season passes

Ticketing discounts and promotions

A multi-year approach to improving ticket yield

Foodservice

In-park sales a significant revenue driver

Foodservice drives in-park sales

Six Flags Great Adventure – Food Offerings

On-the-go food offerings predominate

A smattering of sit-down choices

Discounting in the mix

BYO limitations

Six Flags Great America – Food Offerings

Candy, candy, candy

Meal discounting and promotions

Sales performance

2009

2010

2011

Table 9-5: Six Flags Entertainment Corporation, Key Metrics, 2008-11

## **Universal Parks & Resorts**

Universal Orlando

The Wizarding World of Harry Potter sends attendance skyrocketing

On-site Hotel overview

Hotel dining options

Healthier eating

- Promotions
- Wedding and reception packages
- Ticket food promotions
- Theme Park Dining: Universal Studios Florida
  - Quick-service
  - Full-service
- Theme Park Dining: Universal's Islands of Adventure
  - Quick service
  - Full service
- Dining at CityWalk Orlando
- Universal Studios Hollywood
  - Wizarding World of Harry Potter coming to Los Angeles
  - Ticket food promotions
- Theme Park Dining: Universal Studios Hollywood
  - Restaurant chains welcome
  - Local draw
  - Food centric
- Sales performance
- 2011

Table 9-6: NBCUniversal Theme Parks, Key Metrics, 2010-11

## **The Walt Disney Company**

Parks and Resorts

### **Walt Disney World Resort**

- Magic Kingdom
- Epcot
  - Epcot foodservice at center stage
  - Epcot's answer to authentic Italian cuisine
  - Epcot International Food & Wine Festival
- Disney's Hollywood Studios
  - Hollywood Studios foodservice: functional and fun
- Disney's Animal Kingdom
  - Animal Kingdom foodservice: food incorporated into theme
- Downtown Disney Area
  - Downtown Disney Area foodservice
    - T-Rex theme park restaurant
- Hotels and resorts
  - Walt Disney World Swan and Dolphin
- Disneyworld chain branding
  - Pollo Campero branding initiative
  - Rainforest Café
- Walt DisneyWorld Passholder Program



## **Disneyland Resort**

Disneyland

Disneyland foodservice

    Name restaurant brands disappear

    But food retail brands are prominently displayed

Disney California Adventure

Disney California Adventure foodservice—a taste of California

    Branded signage eschewed

Downtown Disney foodservice

    Drawing visitors on its retail, dining and entertainment strengths

    Easy access for locals

    California Food & Wine Festival

Hotels and resorts

Disneyland hotels and resort foodservice

    New resort set to open in 2013

Table 9-7: Walt Disney Parks and Resorts Business Unit Summary

Sales performance

    2010

    2011

    Fiscal Q1 2012

Table 9-8: The Walt Disney Company, Selected Metrics, 2008-11