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

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

Chapter 9: Amusement Park Operator Foodservice Analyses

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