

The Concession  
& Hospitality Expo

July 15-18  
2014



# Concessions Industry Data Initiative Survey

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FACTS AND FINDINGS



# Goals & Drivers

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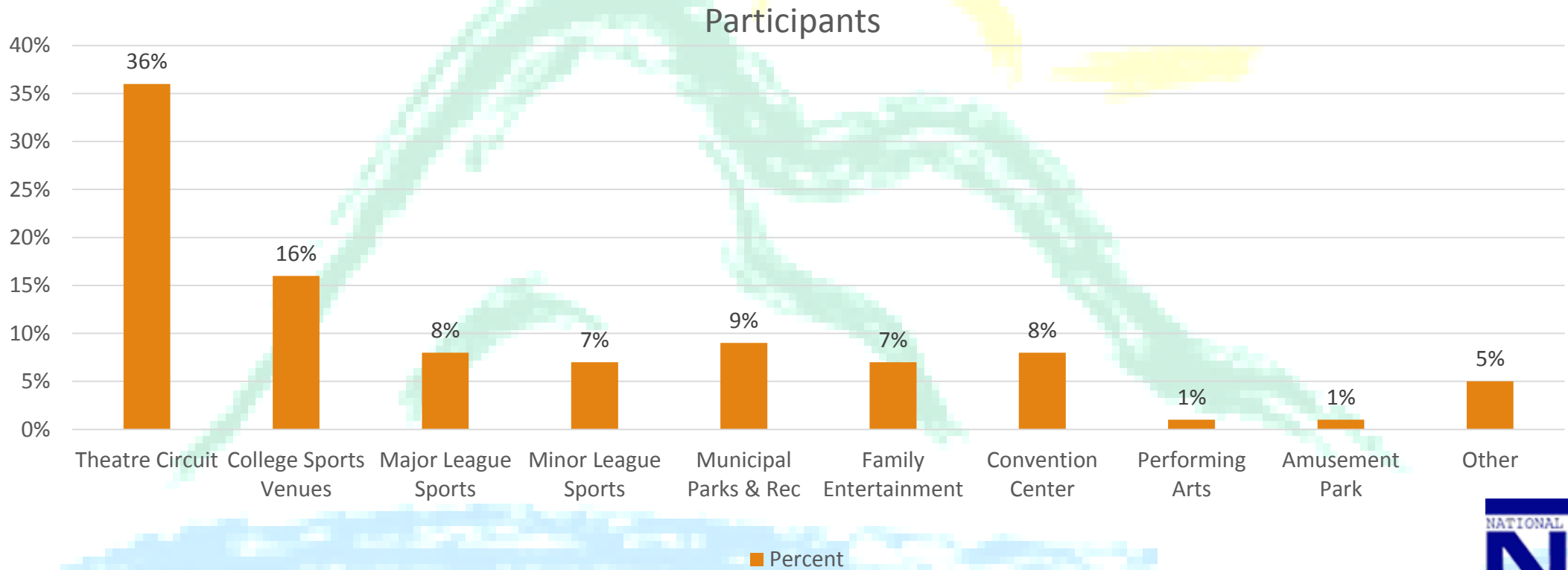
*A survey of concessions operators in order to gain a deeper understanding of operational practices, benchmarks and economic impact of our business.*

*In response to repeated inquiries for deeper information about the Concessions and Hospitality industry by members, industry, press, regulators and legislators.*

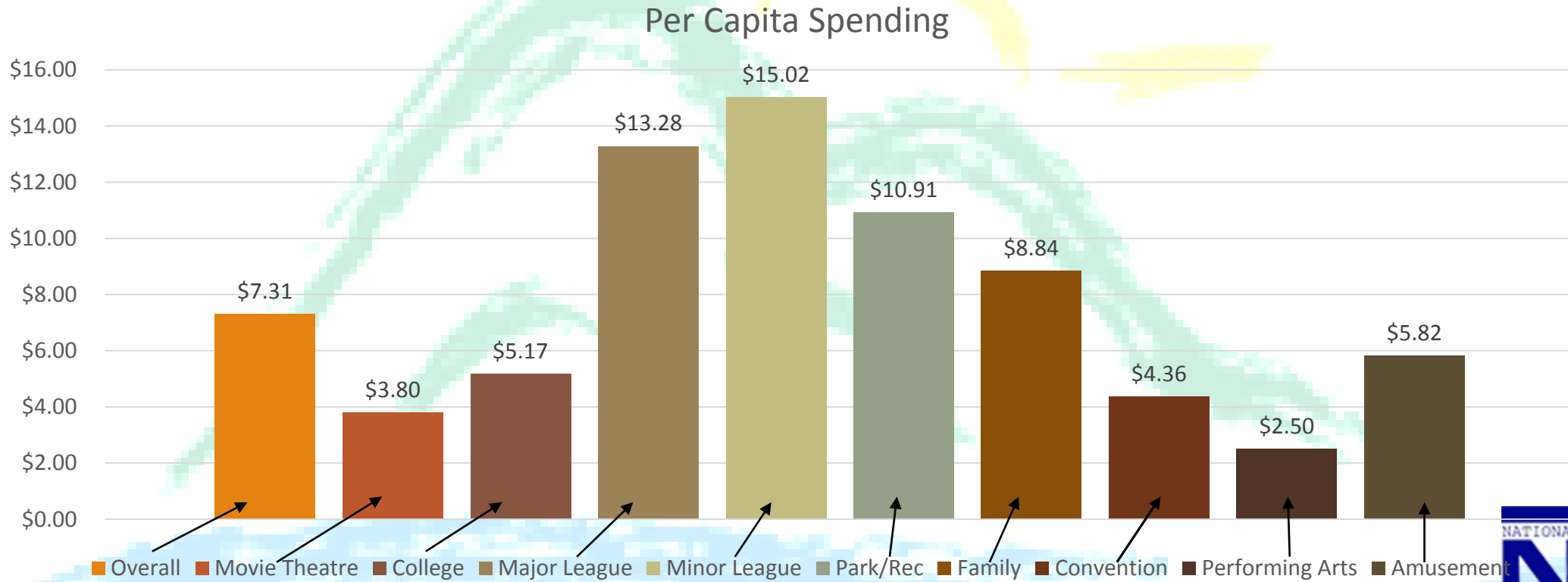
# Methodology

- An online survey conducted in affiliation and by Florida International University Chaplin School of Hospitality & Tourism Management.
- Distributed to NAC members and by NATO Regional VPs
- Project lead at FIU by Dr. Miranda Kitterlin.
- 19 Questions
- 72 respondents
  - Represents 47% of NAC Concession Operator Members

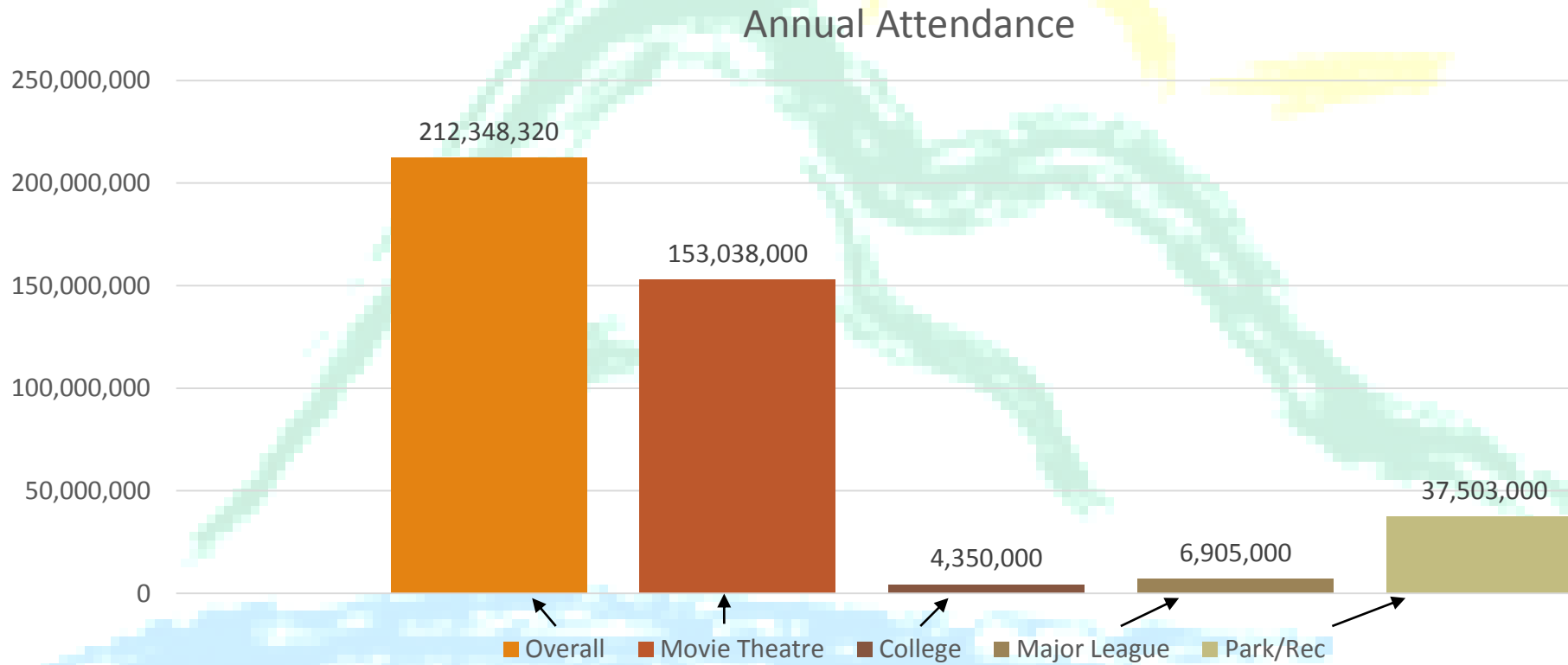
# Survey Participants



# Per Capita Spending



# Annual Attendance



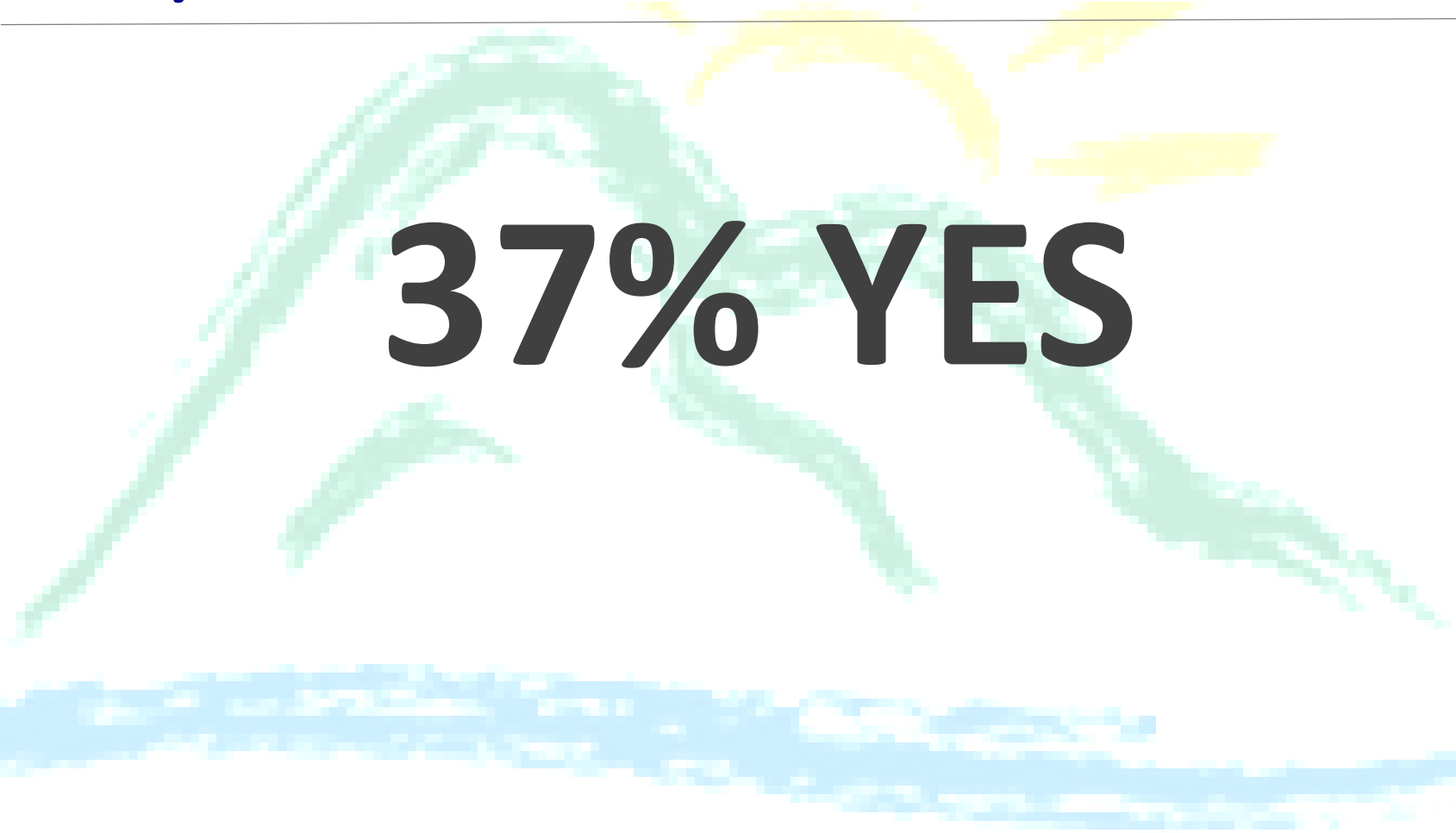
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# Do you sell novelties/souvenirs?

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A large, stylized background graphic in the center of the slide. It features a green mountain range with a yellow sun rising behind it, and a blue wavy line at the bottom representing water or a base. The text "37% YES" is overlaid on this graphic in a large, bold, black font.

**37% YES**

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# Do you sell concessions as a package with ticket or admissions?

## 29% YES

(Constitutes 7.83% of these companies' revenue)

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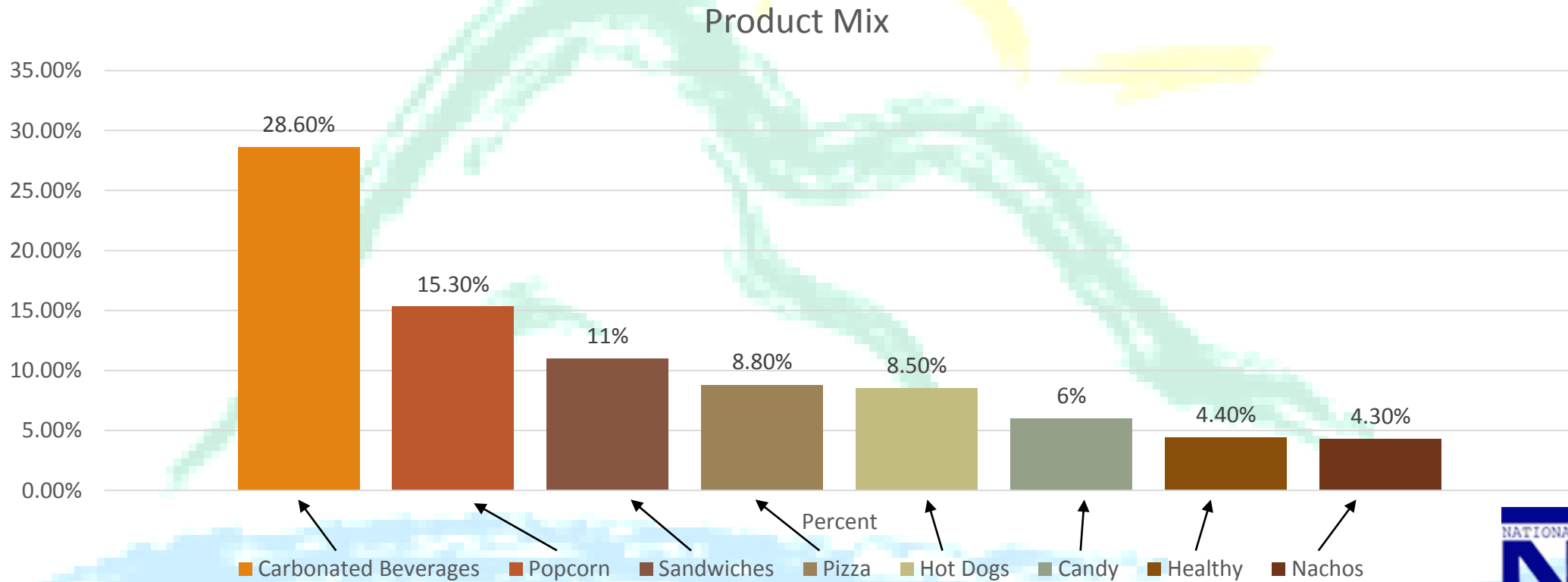


# What percentage of your sales is alcohol related?

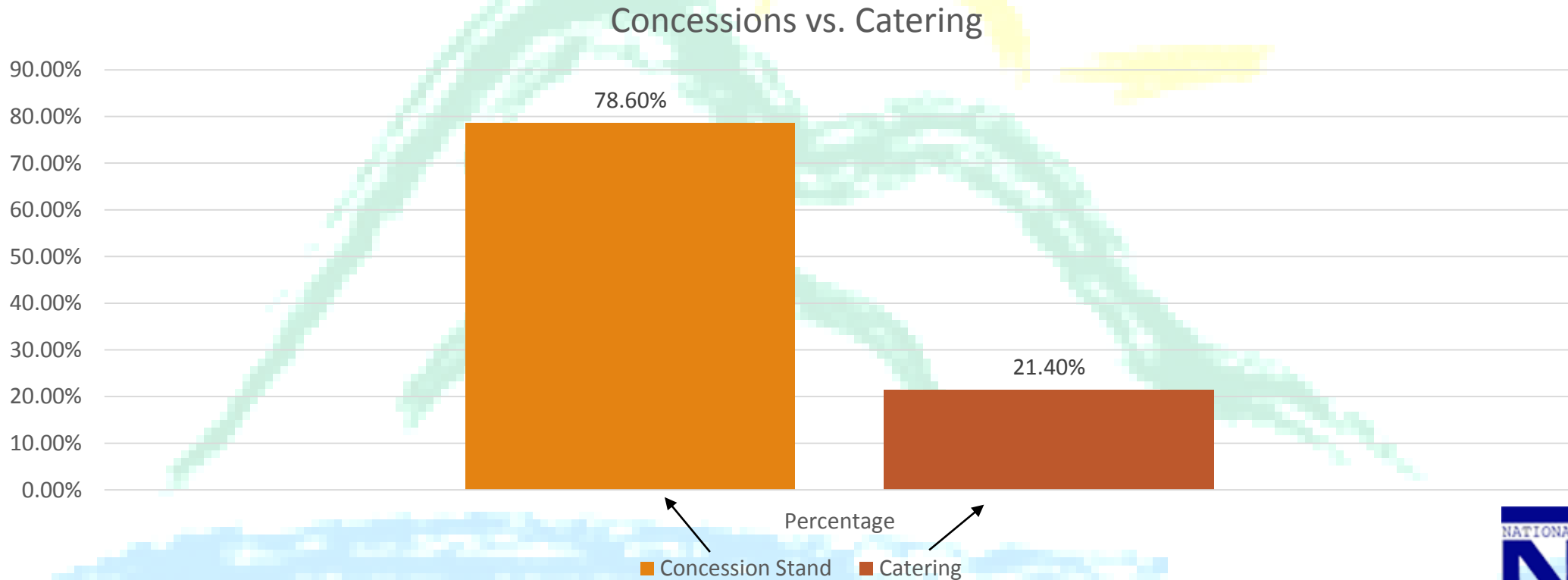
21.75%



# Product Mix Percentage of Sales



# What is your percentage of sales? (Concession Stand vs. Catering/Food)



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# What percentage of your sales come from non-traditional concession items?

12.2 %

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# Do you utilize subcontracted vendors ?

**31% YES**

(Constitutes 16.3% of these companies' revenue)



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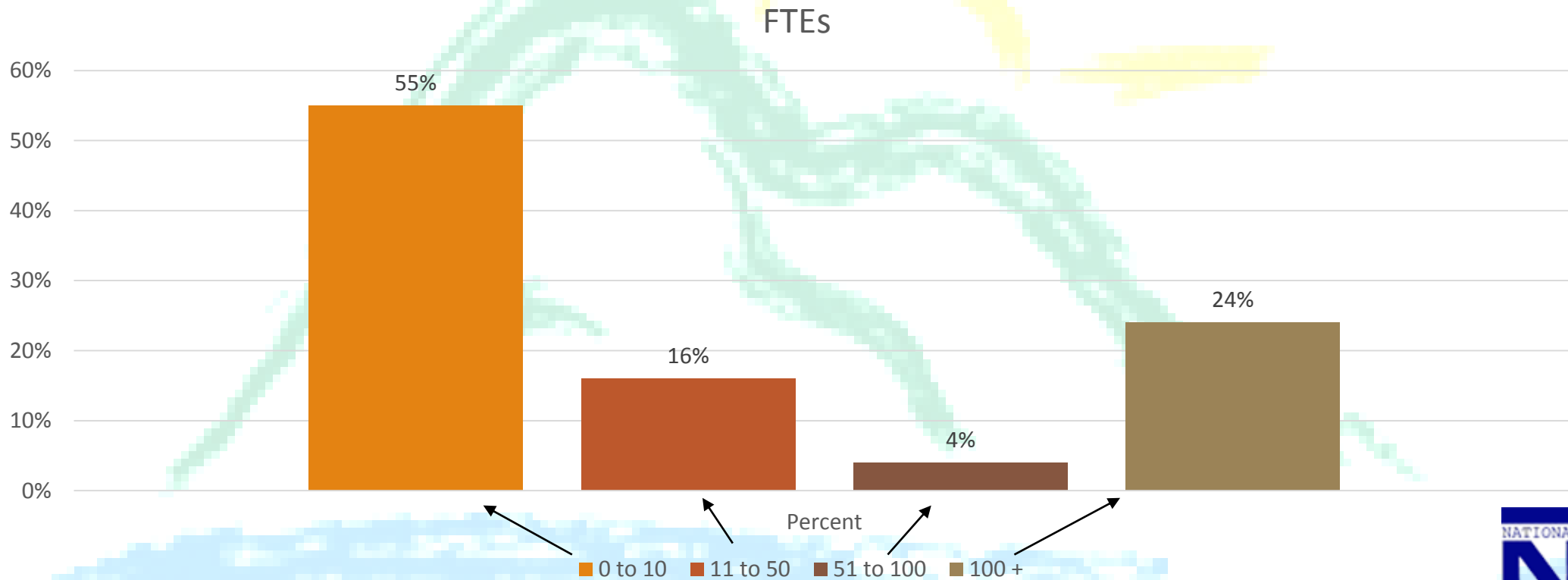
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# What percentage of your concessions revenue is spent on labor costs?

22.1%

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# How many FTEs do you employ?



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# Do you use volunteer groups?

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37% YES

(Constitutes 8.5% of these companies' revenue)





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How much do you estimate is contributed  
to these volunteer groups annually

\$9,149,500

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# Summary

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- Survey was conducted by an impartial source from the academic community
- Numbers represent 47% of NAC Concession Operator Members
- Our member's Per Cap average is \$7.31
- These companies host over 212 million guests/customers/patrons each year.
- That's over **\$1.5 billion** to the economy from this sample alone!
- Our members have diverse menu offerings.
- These companies provide over \$9 million in fund raising for not-for-profit organizations.

# Next Steps

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- Deeper “by vendor type” category analysis.
- Corroboration with other industry groups and sources.
- Create industry size projections.
- Informational media and government relations campaign.