Concessions Industry Data Initiative Survey

FACTS AND FINDINGS
Goals & Drivers

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theatre Circuit</td>
<td>36%</td>
</tr>
<tr>
<td>College Sports Venues</td>
<td>16%</td>
</tr>
<tr>
<td>Major League Sports</td>
<td>8%</td>
</tr>
<tr>
<td>Minor League Sports</td>
<td>7%</td>
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<tr>
<td>Municipal Parks &amp; Rec</td>
<td>9%</td>
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<tr>
<td>Family Entertainment</td>
<td>7%</td>
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<tr>
<td>Convention Center</td>
<td>8%</td>
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<tr>
<td>Performing Arts</td>
<td>1%</td>
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<tr>
<td>Amusement Park</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>
Per Capita Spending

Overall: $7.31
Movie Theatre: $3.80
College: $5.17
Major League: $13.28
Minor League: $15.02
Park/Rec: $10.91
Family: $8.84
Convention: $4.36
Performing Arts: $2.50
Amusement: $5.82
Do you sell novelties/souvenirs?

37% YES
Do you sell concessions as a package with ticket or admissions?

29% YES

(Constitutes 7.83% of these companies’ revenue)
What percentage of your sales is alcohol related?

21.75%
<table>
<thead>
<tr>
<th>Product Mix</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carbonated Beverages</td>
<td>28.60%</td>
</tr>
<tr>
<td>Popcorn</td>
<td>15.30%</td>
</tr>
<tr>
<td>Sandwiches</td>
<td>11%</td>
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<tr>
<td>Pizza</td>
<td>8.80%</td>
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<tr>
<td>Hot Dogs</td>
<td>8.50%</td>
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<tr>
<td>Candy</td>
<td>6%</td>
</tr>
<tr>
<td>Healthy</td>
<td>4.40%</td>
</tr>
<tr>
<td>Nachos</td>
<td>4.30%</td>
</tr>
</tbody>
</table>
What is your percentage of sales?
(Concession Stand vs. Catering/Food)

- Concession Stand: 78.60%
- Catering: 21.40%

Percentage Concessions vs. Catering

- Concession Stand
- Catering
What percentage of your sales come from non-traditional concession items?

12.2 %
Do you utilize subcontracted vendors?

31% YES

(Constitutes 16.3% of these companies’ revenue)
What percentage of your concessions revenue is spent on labor costs?

22.1%
How many FTEs do you employ?

- 55% of the respondents employ 0 to 10 FTEs.
- 16% of the respondents employ 11 to 50 FTEs.
- 4% of the respondents employ 51 to 100 FTEs.
- 24% of the respondents employ 100+ FTEs.
Do you use volunteer groups?

37% YES

(Constitutes 8.5% of these companies’ revenue)
How much do you estimate is contributed to these volunteer groups annually

$9,149,500
Summary

- 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

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