

Design for success to capture the family & children's market

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We are consultants, designers & producers of location-based leisure & learning venues

- Family entertainment centers
- Children's discovery play (*edutainment*) centers
- Family eatertainment facilities
- Adventure play gardens (playgrounds)
- Child care facilities
- Recreation/fitness projects
- Agritainment facilities

Featured

Featured On





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What is family-friendly?

A destination that:

1. meets the wants, needs, values & tastes of the family, both kids and adults
2. exceeds their expectations
3. makes them want to return
4. has them rave about it to their friends

What is the family & children's market?

- Parents accompanying children
- Grandparents accompanying children
- Stay-at-home moms with preschoolers



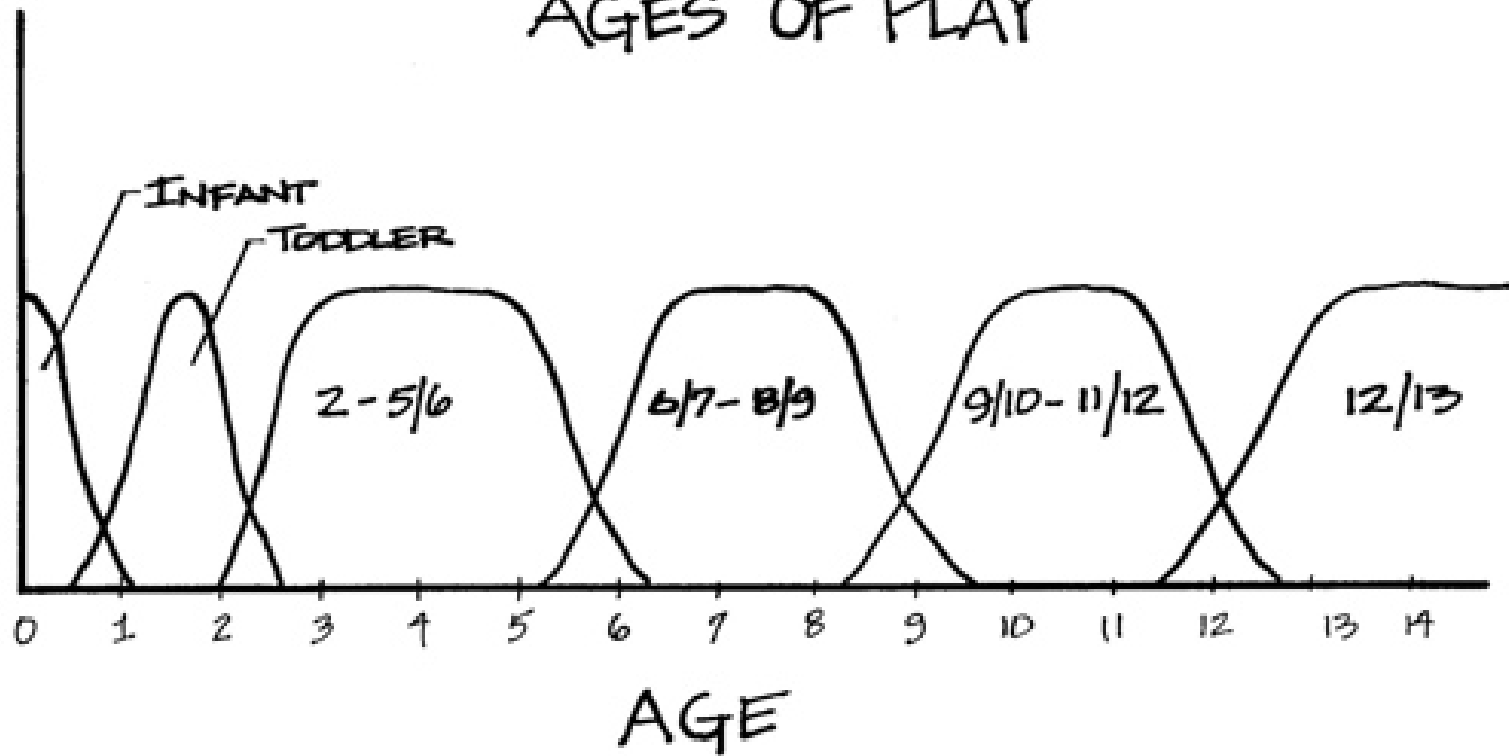
Types of visiting families

- Parents with young children (0 - 8 years)
- Parents with children 2 - 12 years
- Parents with children 8 - teens
- Parents with children 0 - teens

Children's ages of development (play)

Infants	up to 10± months old
Older Infants & Toddlers	10± months - 23± months
Two-year-olds	24± months - 35± months
Preschoolers	3± years - 5/6 years
Early Grade Schoolers	6/7 years - 8/9 years
Tweens	9/10 years - 12± years
Young Teenagers	13± years - 15± years
Older Teenagers	15± years - 17/18 years

AGES OF PLAY



Basic children's age groupings for play & entertainment

Toddlers & 2's (strollers)

3 - 7/8 year-olds

8/9 - 11/12 year-olds

Tweens & teenagers

Family households with children

In 2003 - 25,626,000 families
with children

60% with children >12 years

39% with children 6-11 years

37% with children >6 years

33% with children >5 years

22% with children >3 years

The vast majority of family visits consists of parents with children 12 years and younger



At some agritainment facilities:
40%+ of children >4 years



Stay-at-home moms

- 29.6% of all married-couples with children >15 years
- 35.4% of all married-couples with children >6 years
- 60% have incomes \$40,000+
- In many suburban areas, 40%+ of all married-couples with children >6 yrs

Stay-at-home moms with preschool children can be high repeat customers



Women are the majority market—they control 83% of all product purchases and 92% of all vacation decisions



Market research has proven time and time again that the primary thing women want, as people and consumers, is relationships. They want to understand what a brand stands for on the whole and whether the brand's image, philosophy and/or ethics are in sync with their own.

Today's stay-at-home mom

- No Harriet



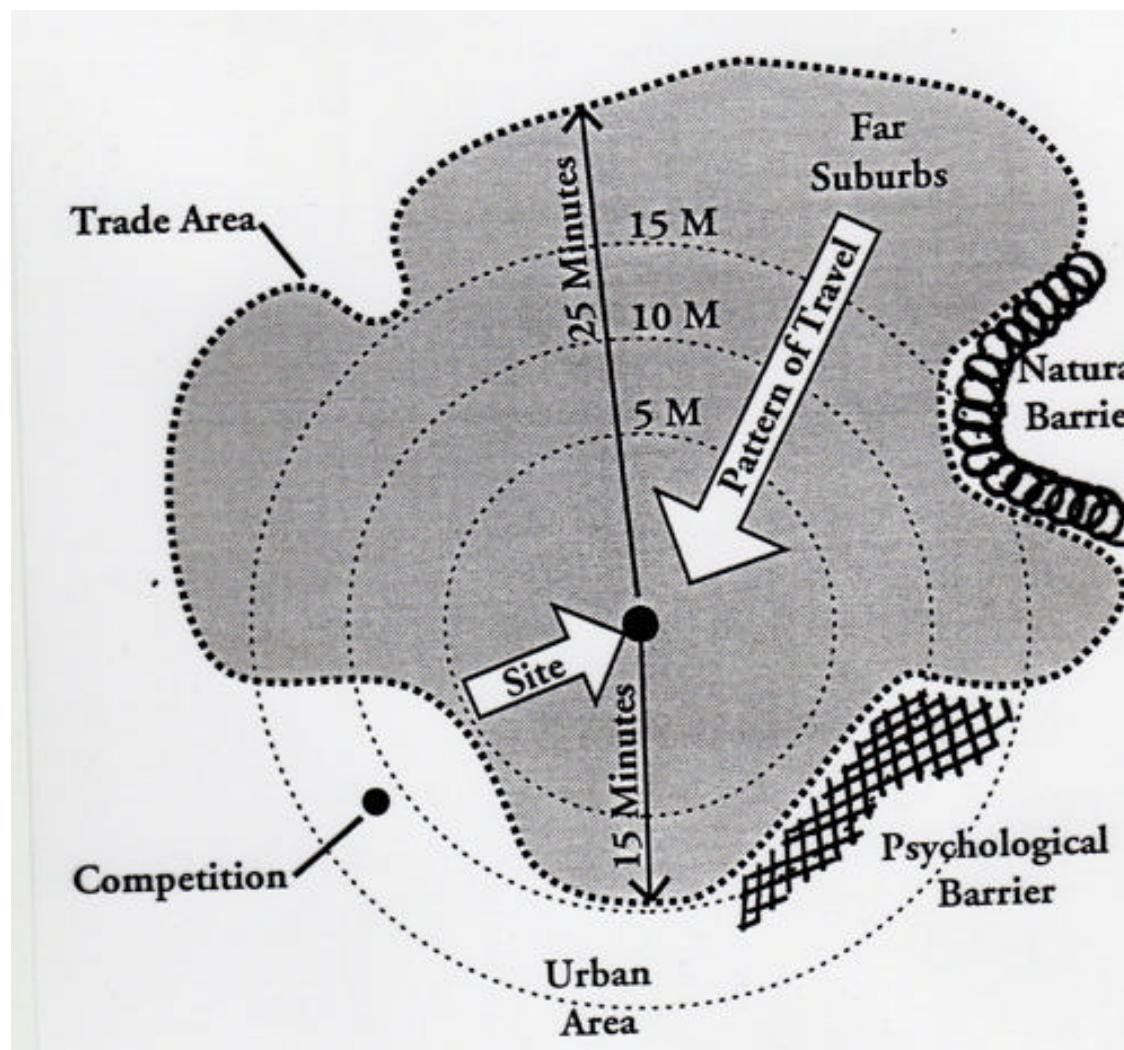
- 2/3's preschool moms are Generation Y
- May have already succeeded at a career
- Helicopter mom
- High expectations

Market feasibility

Market Area Factors

- Length-of-stay (scale and mix)
- Spending per hour
- Drivetimes (varies by market)
- Competition (direct & indirect)
- Natural & psychological barriers

Concentric circle versus true market areas

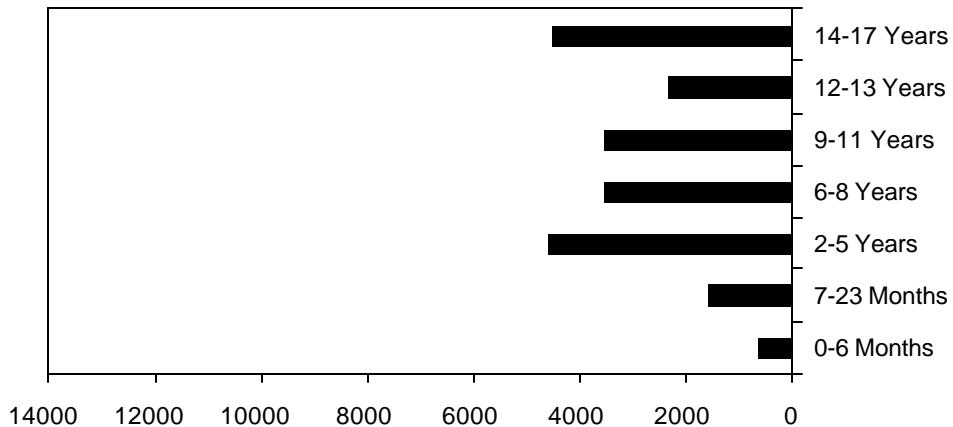


	True Amoeba Shaped Market Areas			Traditional Concentric Circle Approach		
	Primary Market	Secondary Market	Total Market	0-5 Mile Radius	5-10 Mile Radius	0-10 Miles Total
Population	110,300	189,500	299,800	82,500	289,400	371,900
Median Family Income	\$42,800	\$41,200	\$41,700	\$46,600	\$37,700	\$39,100
# Families with \$50,000 + Incomes	10,900	18,000	28,900	10,000	24,000	34,000
# Children 2-9	11,300	20,800	32,100	9,200	34,400	43,600
# Adults with College Degrees	15,900	25,900	41,800	13,800	37,500	51,300

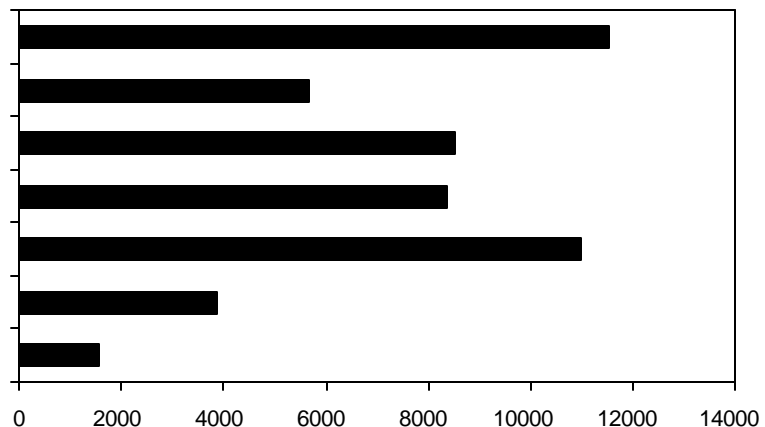
Key Market Indicators

- Number of families with children
- Number of children by ages of play
- Growth of # of children
- Average family incomes
- Family income distributions
- Market distribution of family incomes
- Educational attainment
- Stay-at-home moms with preschoolers
- Socio-economic/lifestyle of children families
- Distribution of target market by drivetime

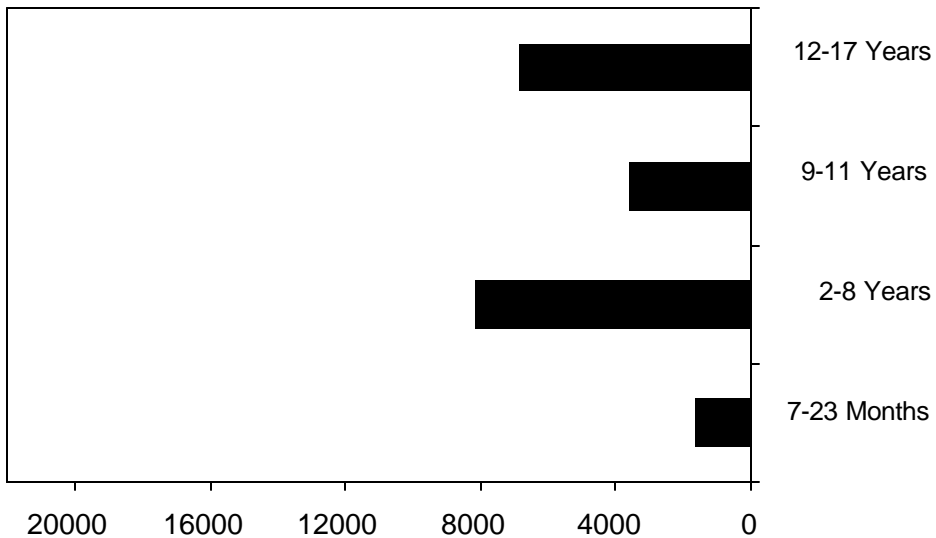
Primary Market Area



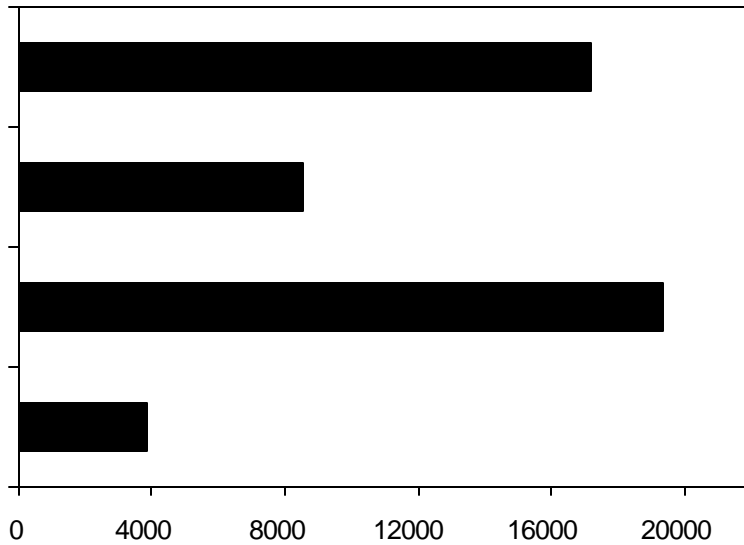
Secondary Market Area



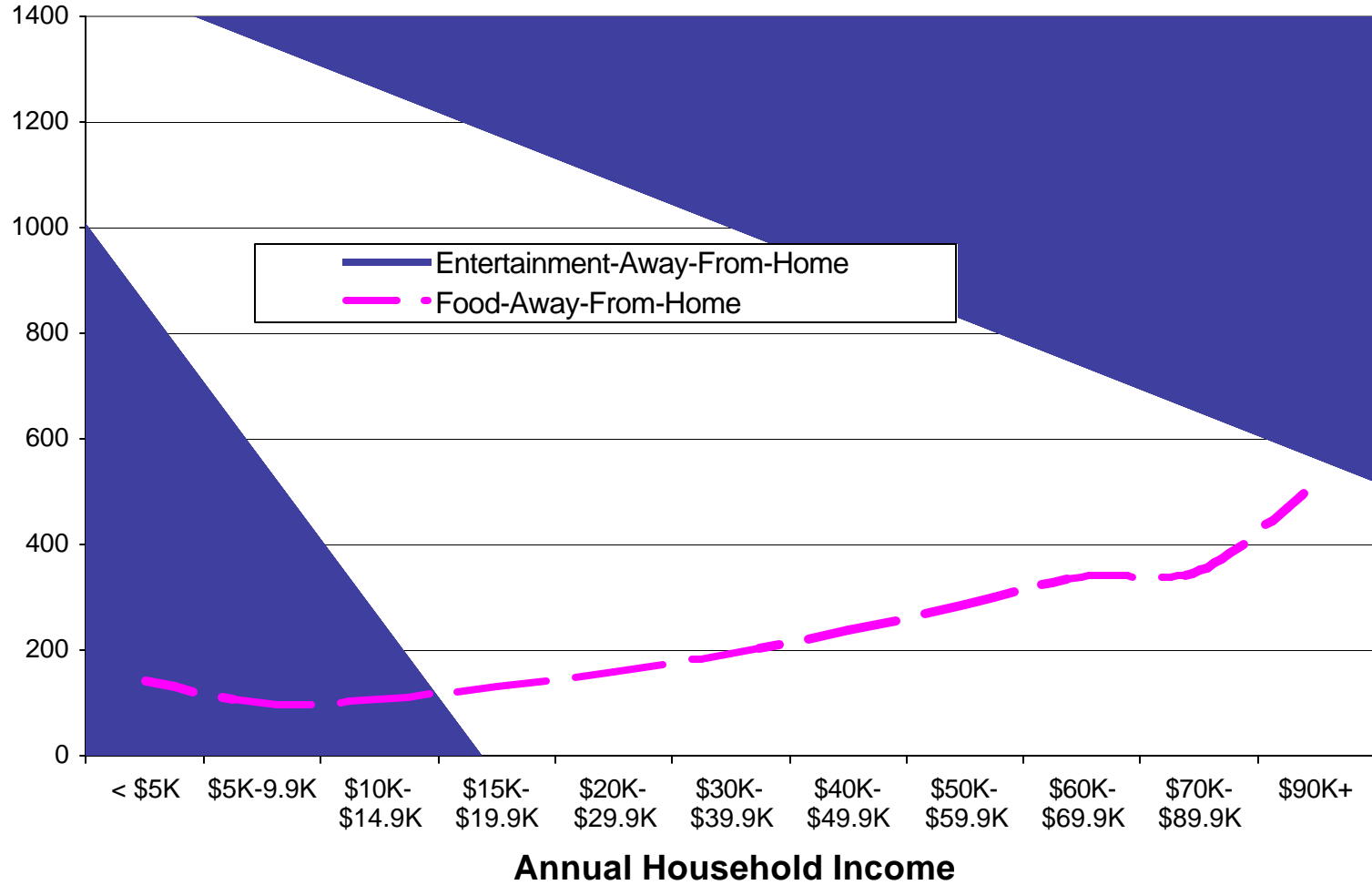
Primary Market Area



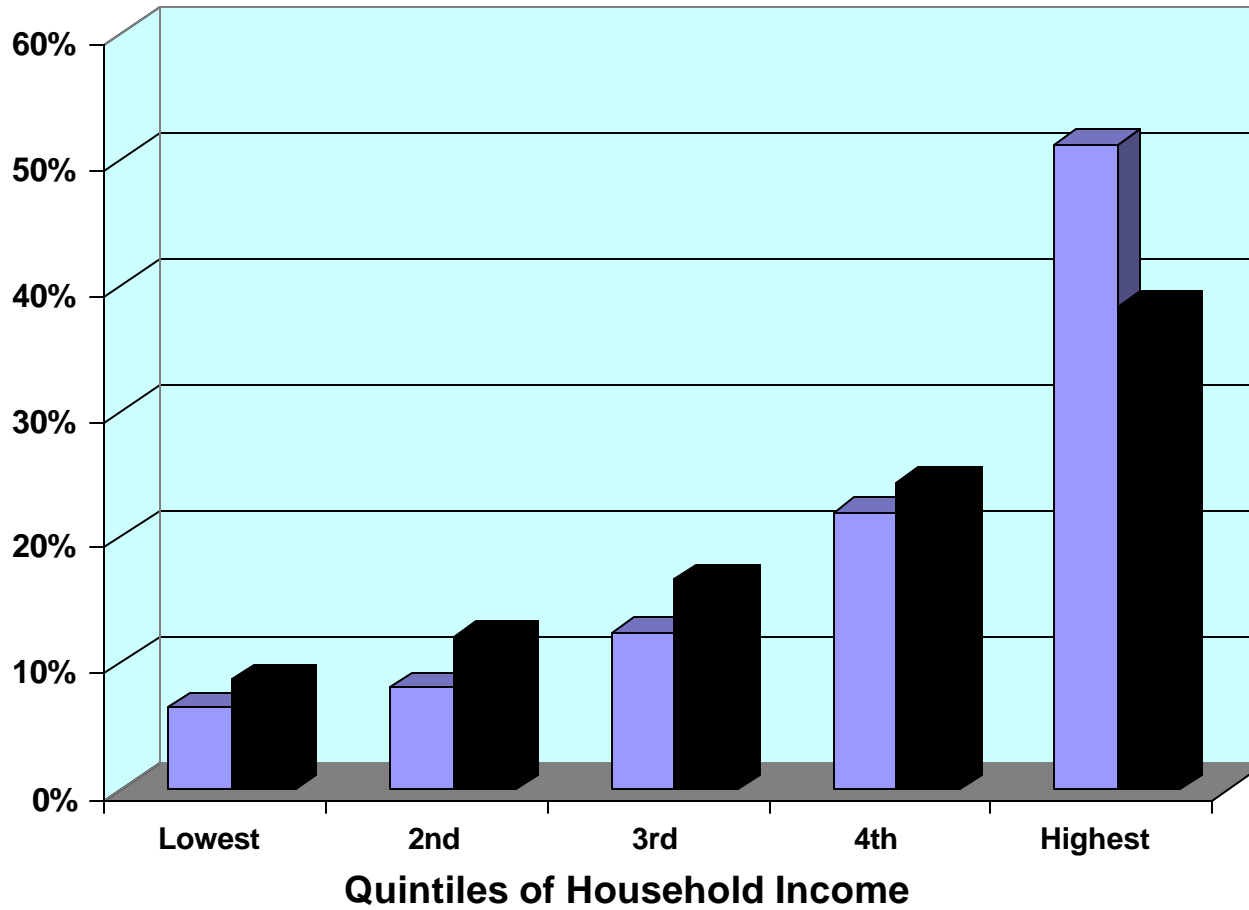
Secondary Market Area



Index of Household Spending 2001-2002



Percent of 2002 Expenditures by Income Quintile



■ All Out-of-Home Entertainment

■ All Food Away-From-Home

$$\begin{aligned} &\text{Annual attendance} \\ &\quad \times \\ &\text{Per capita expenditures} \\ &\quad = \\ &\text{Annual revenues} \end{aligned}$$

$$70,000 \times \$12 = \$840,000$$

Type of revenues

- General admission & attraction fees
- Food & beverage
- Birthday parties & celebrations
- Other groups
- Field trips
- Sleep-overs (lock-ins)
- Day camps
- Classes & workshops
- Retail
- Sponsorships
- Advertising

PROJECTION WORKSHEET

All amounts are in AED

Guest Category	Annual Attendance	Admission & Event Per Caps	Food & Bever Per Caps	Games Per Caps	Retail Per Caps	TOTAL Per Caps	Admission & Event Revenue	Food & Bever Revenue	Games Revenue	Retail Revenue	TOTAL Revenue
General Admission											
Children											
7-35 mos.	15,983	13.95	7	8	0.2	29.2	222,960	111,879	127,862	3,197	
3-9 yrs.	82,840	27.90	9	12	0.2	49.1	2,311,244	745,563	994,084	16,568	
Total/Aver Children	98,823	25.64	8.7	11	0.2	45.9	2,534,204	857,442	1,121,946	19,765	
Parents	49,412	5.58	14	4	0.2	23.8	275,716	691,761	197,646	9,882	
Total/Average All	148,235	18.96	10.5	9	0.2	38.5	2,809,920	1,549,203	1,319,592	29,647	5,708,362
Per Caps for Events Below Are In Addition to Food & Beverage, Game, and Retail Included in Bundled Admission Price of Each Events											
Birthday Parties											
Children	73,491	40.5	0	4	0.2	45	2,973,081	0	293,964	14,698	3,281,744
Adults	36,746	17.2	0	1	0.2	18.4	632,207	0	36,746	7,349	676,302
Total/Average All	110,237						3,605,288	0	330,710	22,047	3,958,045
Subtotal	258,471						6,415,208	1,549,203	1,650,302	51,694	9,666,408
Enrichment Classes	7,200	35	0	0	0.1	35.1	252,000	0	0	720	252,720
Field Trips											
Preschool/K	8,892	18	0	0	0	18	160,056	0	0	0	160,056
Grade School	15,591	18	0	0	0	18	280,638	0	0	0	280,638
Summer Camps	2,400	20	0	0	0	20	48,000	0	0	0	48,000
Total/Average All	26,883	18.2					488,694				488,694
Summer Camps	2,280	50	0	1	0.1	51.1	114,000	0	2,280	228	116,508
Fund Raisers	3,900	9.5	10.5	9	0.2	29.1	36,964	40,759	35,100	780	113,603
Sleep Overs	1,200	50	12	12	0.3	74	60,000	14,400	14,400	360	89,160
TOTAL/Average	299,934	24.6	5.3	5.7	0.18	35.8	7,366,866	1,604,362	1,702,082	53,782	10,727,093
Children Attend	211,827										
Adults Attend	88,107										
Guest Category	Annual Attendance	Admission & Event Per Caps	Food & Bever Per Caps	Games Per Caps	Retail Per Caps	TOTAL Per Caps	Admission & Event Revenue	Food & Bever Revenue	Games Revenue	Retail Revenue	TOTAL Revenue

Admission pricing

- general admission - adult & child
- membership
- birthday parties
- groups

The family marketing equation

1. Mom is in the driver's seat
2. The children are sitting next to her as the navigators, and
3. If the husband is along, he is sitting in the back seat paying the bills (*poor dad!*)



The big issue today is capturing a share of:

Disposable



versus

Disposable



The agritainment marketing advantage:

for parents:

nostalgia

outdoors

fun for children

educational for children



for children:

fun

animals



A family agritainment brand

- keep it 'farm' authentic - that's your brand
- tell your story
- not too slick
- avoid upfront technology
- the appeal of the outdoors, nature & animals

Parent (mom) friendly features:

Security (abductions)

Clean & sanitary

Safe

Fun for child

Restrooms

Shade

Visibility

Seating

Food & beverage

Restrooms



- child size & height sinks
- children's toilet
- dedicated diaper changing
- clean & bright
- room for strollers
- family restroom



Shade



Making it
work for
children



Children's boredom

- Caused by a mismatch between what children have the ability to do and what they are expected to do
- Enjoy themselves when their skills match the task
- If challenged beyond their ability, become anxious and often claim boredom as defense
- If not challenged enough - they become bored or find inappropriate challenging behavior
- Need to create varied and graduated challenges

Age appropriate play

Toddlers & 2's

3 - 5 year-olds

6 - 8/9 year-olds

Tweens

Teenagers

The family together

Children read environments differently than adults

Adults see the environment as the
background for events

Children look for the environment's
affordances - what the environment "affords"
them to do - how they can interact with it

Children's 'misbehavior' is usually the result of improperly designed environment



Children want to be empowered

They want to feel competent

**Anthropometrics
is very important**



Anthropometric issues

- height
- reach
- eye level
- seating
- step height
- restrooms

Wayfinding

Young children don't read

Developmentally appropriate play

- pleasurable
- hands-on/participatory
- self-directed
- imaginative
- non-goal directed
- spontaneous
- open-ended
- free of imposed tasks or adult-imposed rules

Laws & regulations

Americans with Disabilities Act (ADA)

Consumer Product Safety Commission (CPSC)

American Society of Testing Materials (ASTM)

Health department

State ride regulations

Other governmental laws and regulations

ADA Guidelines & Rules affecting play & recreation facilities

ADA Accessibility Guidelines for Buildings and Facilities

ADA Accessibility Guidelines for Buildings and
Facilities; Building Elements Designed for Children's
Use

ADA Accessibility Guidelines for Buildings and
Facilities; Recreational Facilities (this includes
playgrounds and petting zoos)

CPSC Handbook for Public Playground Safety

Model Law on Public Play Equipment

Height of equipment

Fall zone around equipment

Safety surfacing

Head & finger entrapment

Strangling hazards

Age zoning of play equipment

Infants & toddlers

2-5 year-olds

Early school age

Safety surfacing

- Engineered wood fiber
- Poured-in-place rubber
- Rubber tiles
- Pulverized rubber

Sand, gravel and wood chips do not meet ADA accessibility requirements

This does not meet
safety requirements



not commercial playground equipment
& no safety fall zone

Children love animals

Young children feel a natural kinship with and are drawn to animals, especially baby animals

Children instinctively interact with animals

Children > 6 years - 80% of their dreams are about animals

90% of characters in preschool children's books are animals

Dominant appeal is to children 2 to 7 years-old



CDC research on E. coli infections in 2000 at two farms

Findings:

- contact with cattle
- activities promoted hand-mouth contact - nail biting, purchasing food
- animals not in separate area
- lack of convenient handwashing



This



Not this

Safety with animals

1. no cattle
2. animals in separate area away from food & beverage, play areas, etc.
3. handwashing with soap & running water at exit of animal area with signage
4. signage at entry to facility

SIGN FOR GENERAL ADMISSION TO FARM AND AT ENTRANCE OF ANIMAL PETTING AREAS

SAFETY TIPS

NAME OF FACILITY has created the following rules in compliance with suggestions from the Center for Disease Control to protect you and your family. Please note that harmful bacteria may be present in animal areas.

- Wash hands with soap and water upon leaving the animal area or touching animals.
- Supervise young children while washing their hands.
- Do not eat or drink in the animal area or before washing hands with soap and water.
- Please put away baby bottles, pacifiers, and children's toys before entering the animal area.
- People of high risk such as pregnant women, the very old, the chronically ill and those with compromised immune systems should avoid animal contact.

Thank You

SIGN AT HANDWASHING STATION

SAFETY TIPS

AFTER LEAVING ANIMAL AREAS OR TOUCHING
ANIMALS
WASH YOUR HANDS

Supervise young children while washing.
Use SOAP and WATER.

RUB hands together for 20 seconds.
WASH back of hands, lower forearms, wrists,
between fingers and under fingernails.
DRY hands with a clean paper towel.

Niche markets

1. Families (*adults with children >13*)
2. Children (*adults with children >9*)
3. Stay-at-home moms (*with children >6*)
4. Birthday parties (*children 2 - 8/9*)
5. School field trips
6. Groups

Families *(adults with children >13)*

Things the entire family can do together



Food & beverage



MENU	
HAMBURGERS	2.75
Hot Sauce	1.75
All Sides & Toppings	1.75
HOT DOG	1.00
All Sides & Toppings	0.75
BRISOL Sandwich	2.50
CORN DOG	1.00
All Sides	0.75
MILKSHAKES & Cheesecake	3.75
Smashin's PB&J	0.75
DRINKS	
PEPSI-Blue PEPSI	1.75
Real Blue-Real	1.50
COFFEE	1.50
TEA	1.50
HOT CHOCOLATE	1.50
CAPPUCCINO	0.75
Fruit SALAD	2.75
Cheese SALAD	2.50
WITCH HELLON	2.75



- No facility is too small to not have food service.
- Food & beverage is an essential component of group socialization.
- Food & beverage can drive visits and frequency as much as, if not more than, entertainment.
- Food & beverage increases length-of-stay, per capita expenditures, market draw and profits.
- A well designed and managed food & beverage operation can generate a 40+% profit after deducting COGS and labor.
- Ban the words “snack bar” and “concession” from your vocabulary. Think café, bistro and restaurant instead.

- The public has high expectations for food & beverage and their expectations are rising every day.
- The public's food tastes are becoming very sophisticated.
- Having fun and health food do not necessarily go hand-in-hand. People no longer 'cheat' when dining out.
- Parents' and children's food and beverage preferences are often different—to succeed, you need to satisfy both.

Today's food issues

- low calorie
- low fat
- low/no trans-fats
- low carbohydrate
- low/no sugar
- high fiber
- whole grain
- portion size
- allergies
- fresh
- natural
- artisan
- handcrafted
- **have it my way!!!!**

Kid friendly eats & treats

- eye appeal, colors
- dipping
- hand-held
- bold flavors
- more cosmopolitan palate
- fun
- don't dumb down with silly names
- feel in control, competent



Kids are eating healthy



Stay true to your brand with 'farm' food



Children are biologically wired to play

Play is nature's way of programming children with a pleasurable activity that teaches them about the world around them and how to become a part of society

Characteristics of developmentally appropriate play

- Highly pleasurable
- Process-oriented, non-goal directed
- Child-initiated and self-initiated
- Activity of the mind, the imagination
- Free of imposed tasks or adult-imposed rules
- Hands-on, participatory
- Open-ended

One of the unique qualities of developmentally appropriate play is that it has high repeat appeal

Children create their own play script.

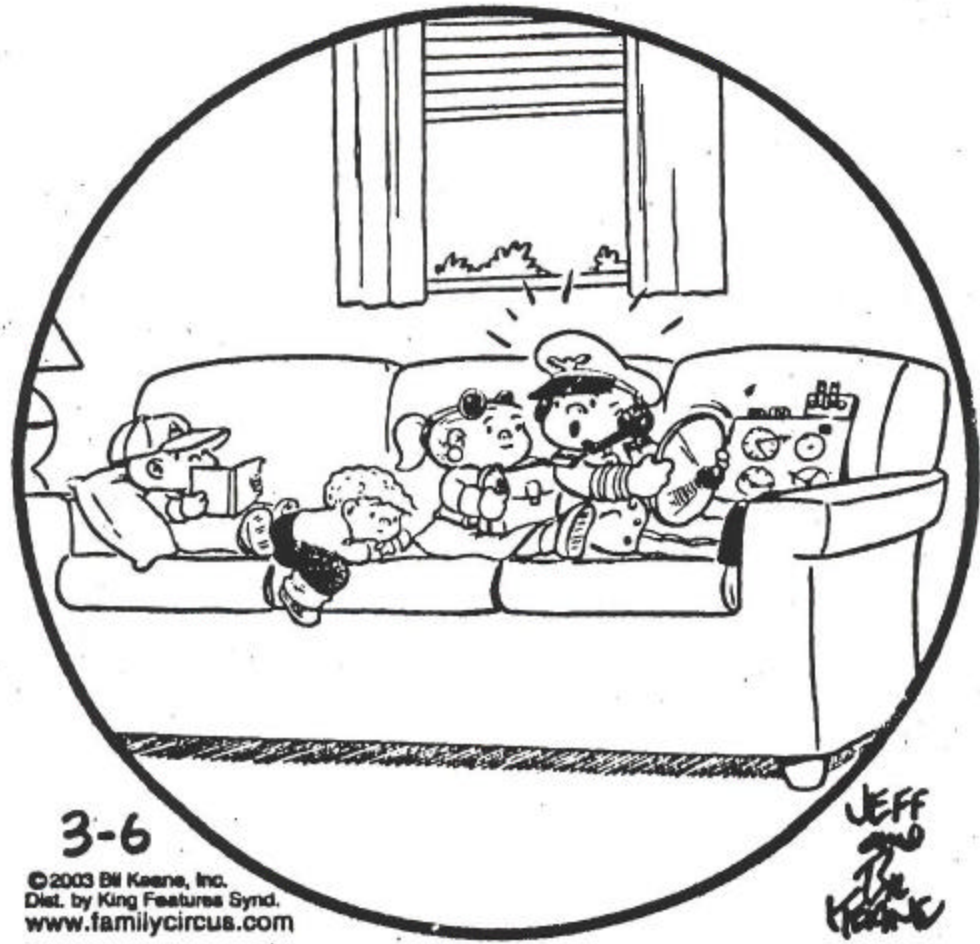
The scripts constantly change, so the play is different every time



Open-ended with
continually changing
play scripts



Imaginative Pretend Play



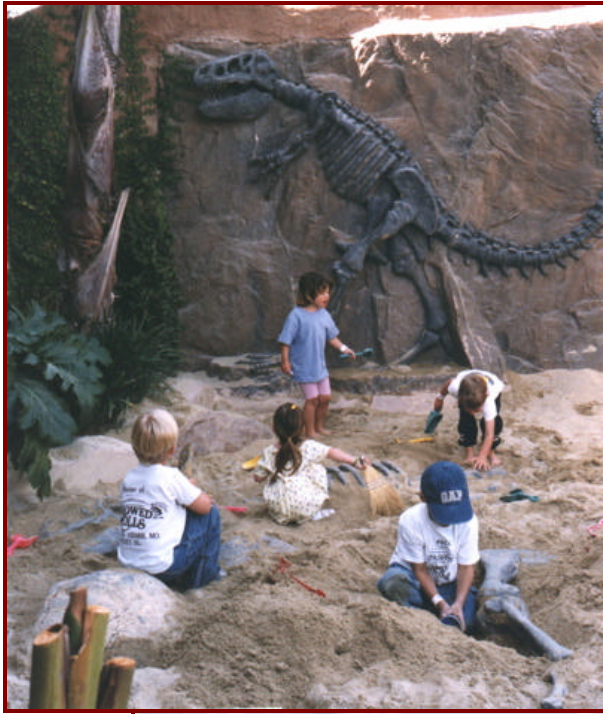
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“Just a minute, Mommy! We’re on final approach!”

The high repeat appeal
of children's play makes it
a powerful attraction







Animals



Fishing





Water tables



Water Playground





Feasibility & design by White Hutchinson
12-year client

