

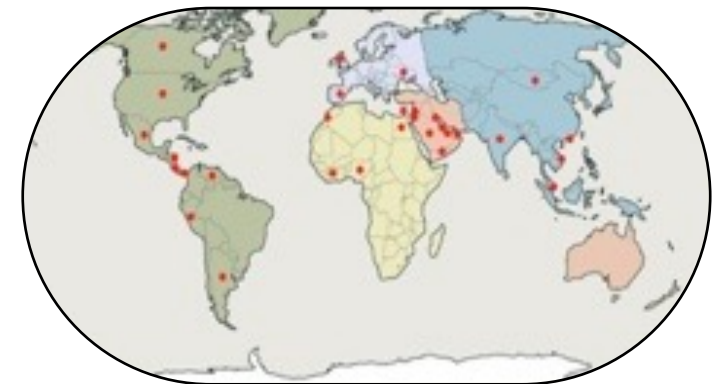
Move over families, HERE COME the ADULTS

July 26, 2016

Randy White, CEO



- 40-years' experience performing feasibility studies
- Served 500+ clients in 33 different countries
- Projects have won 16 first-place awards
- Expertise and projects featured in *Time* magazine, *The Wall Street Journal*, *USA Today*, *New York Times*, on the *Food Network* and in many national and industry publications
- Website has over 2,000 pages of information



Entrepreneur
MAGAZINE

The New York Times

THE WALL STREET JOURNAL.

**USA
TODAY**



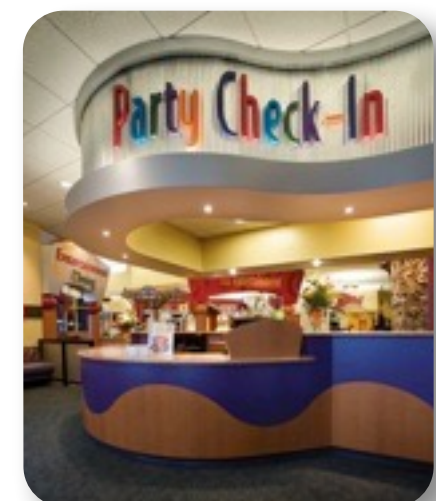
Feasibility, design, production & consulting for:

- Family entertainment centers
- Hybrid bowling centers
- Laser Tag
- Adult-oriented eatertainment centers
- Children's edutainment (play & discovery) centers
- Adventure & discovery play gardens (playgrounds)
- Mixed-use entertainment, retail & dining projects
- Agritainment/agri-tourism projects

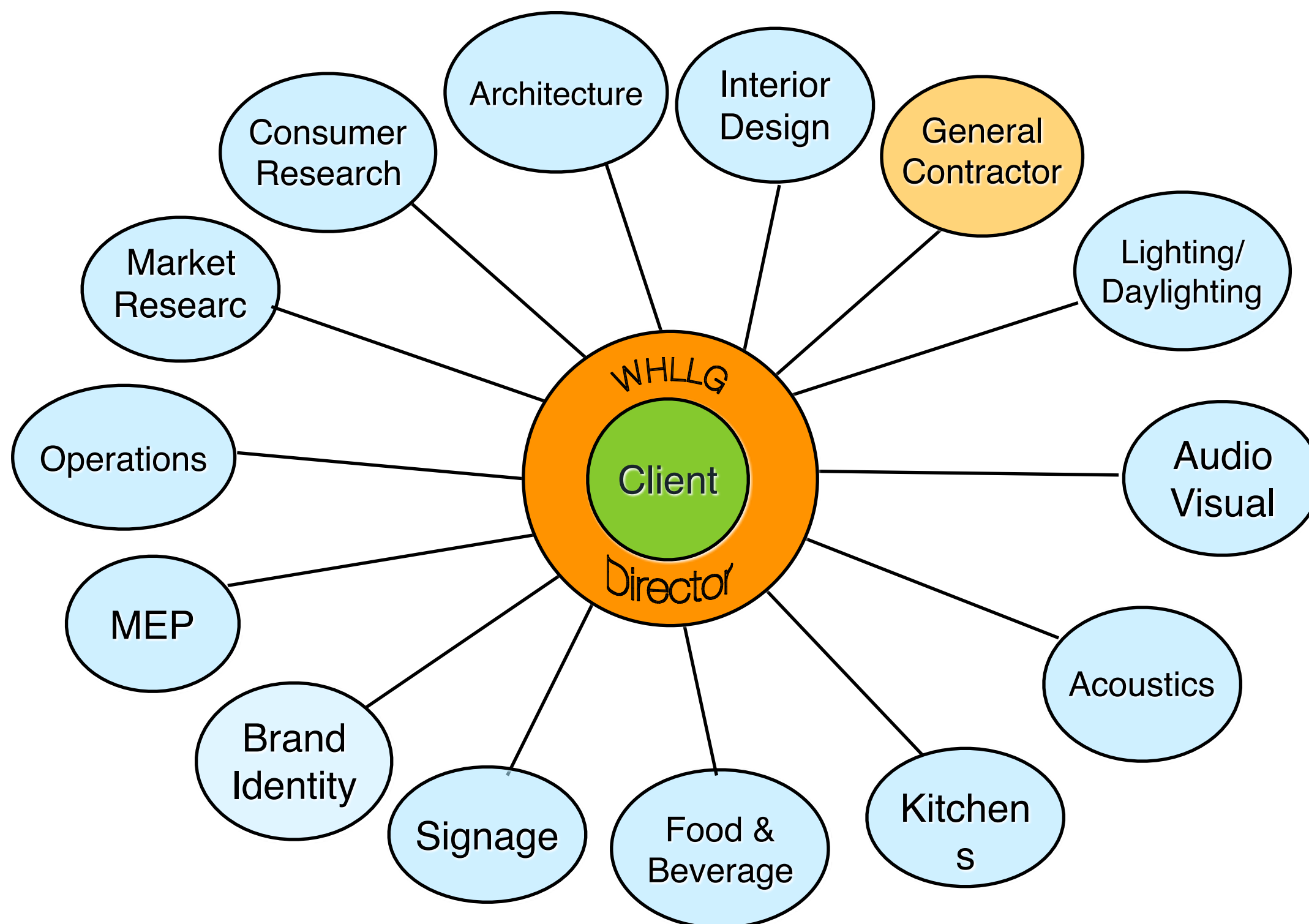


Feasibility, design, production & consulting services (A to Z):

- Market feasibility
- Site evaluation & selection
- Financial feasibility & projections
- Cost estimates
- Concept & mix development
- Brand development
- Full site, architectural & interior design
- Specify furniture, fixtures & equipment
- Full food service design & set-up
- Management start-up & training
- Business audits

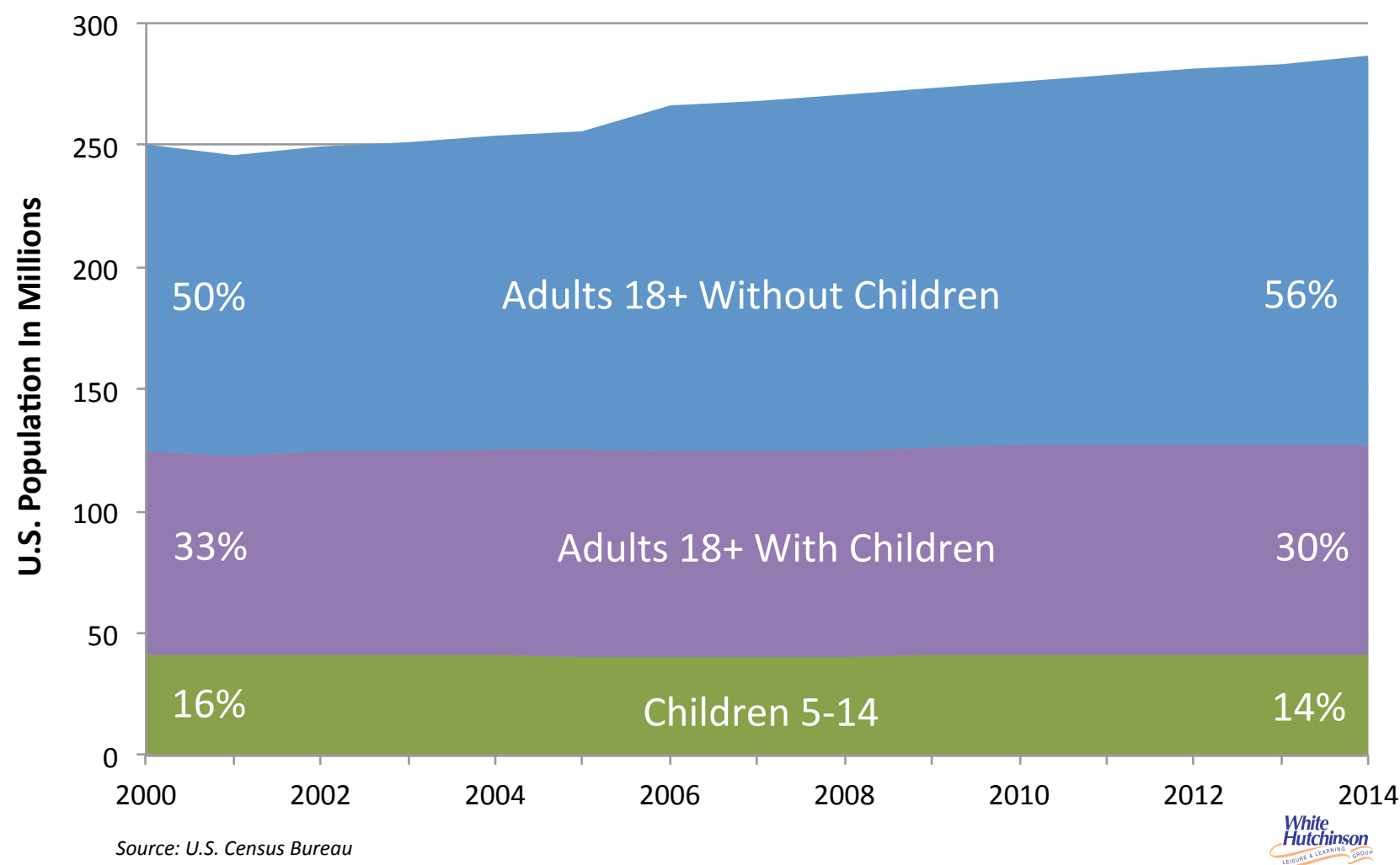


Integrated Approach to Business Development

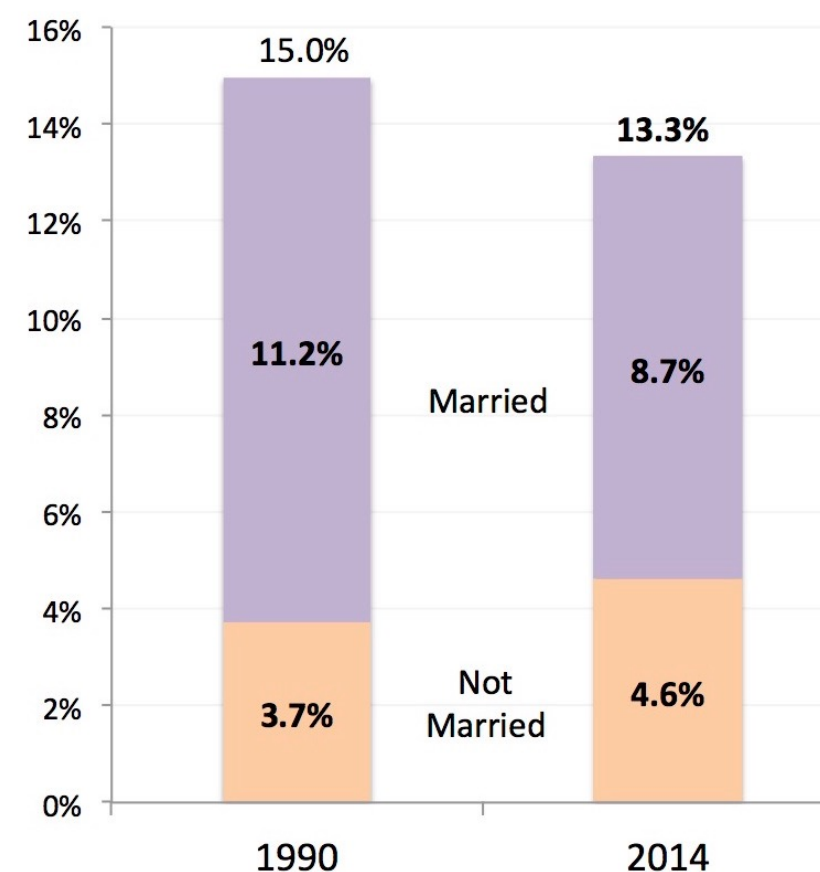


Families with children on the decline

U.S. population by selected characteristics 2000-2014



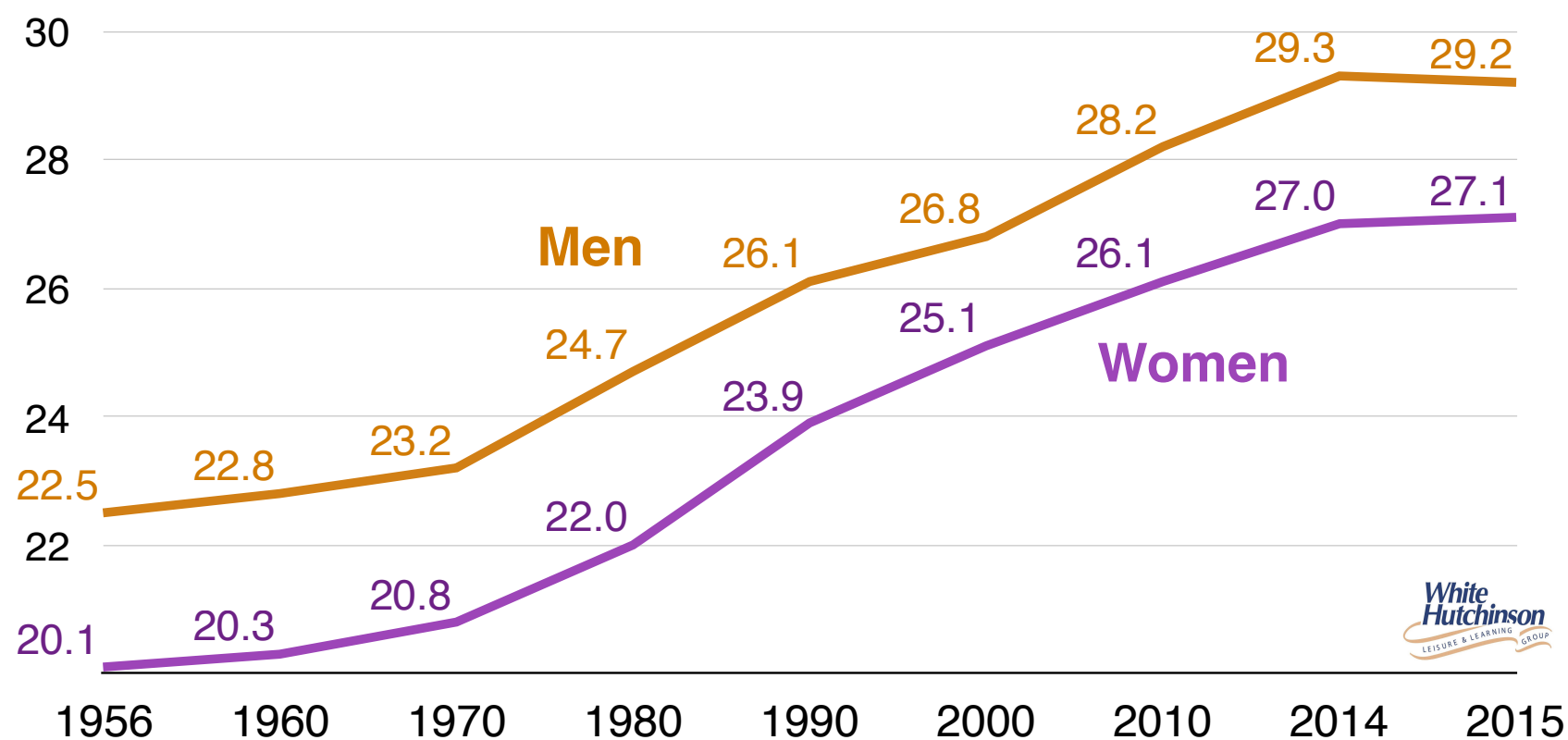
Percent of all households with children ages 5-14



Source: U.S. Census Bureau

Young adults are delaying their first marriage

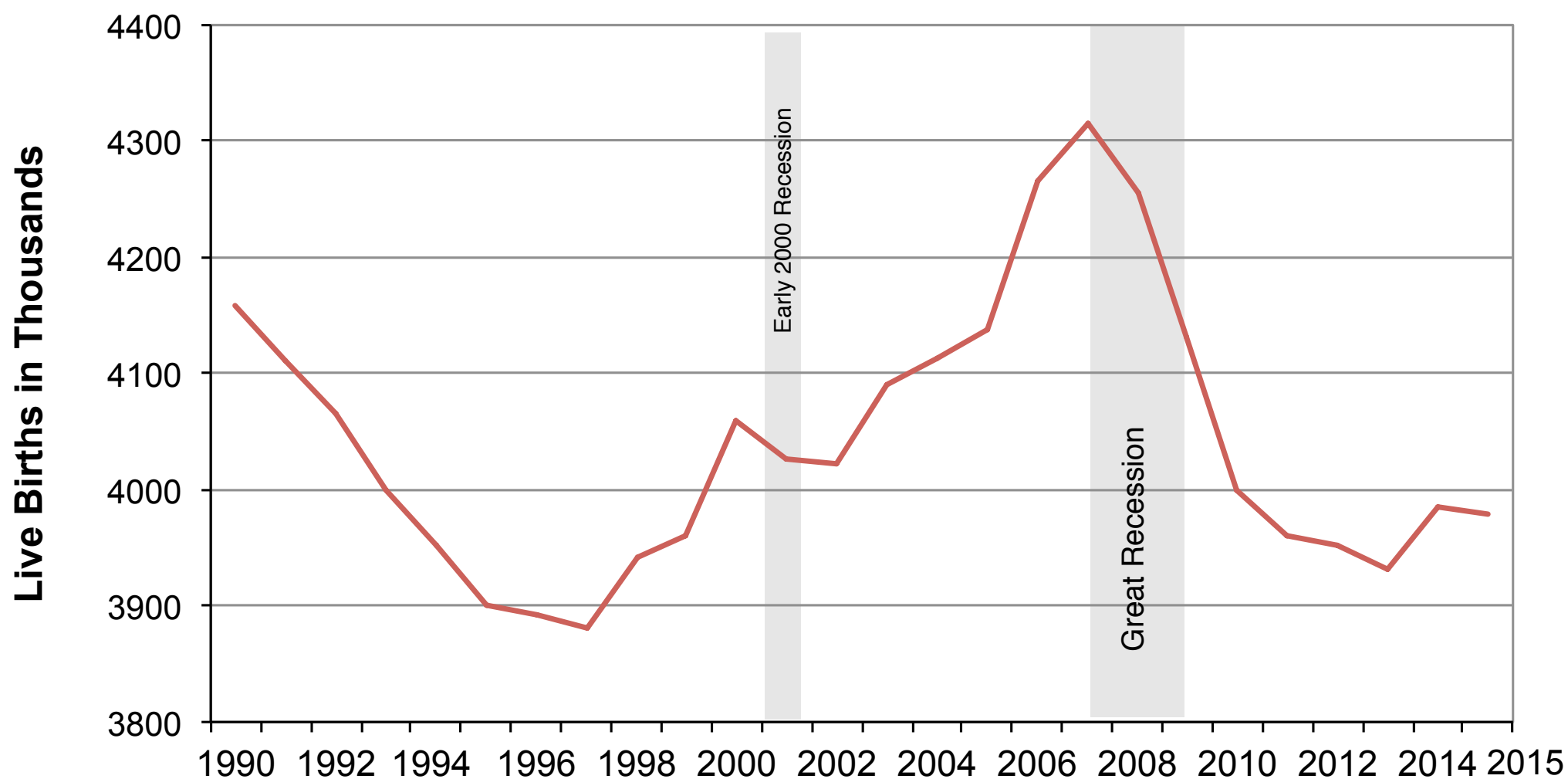
Median age at first marriage



Source: U.S. Census Bureau, Family and Living Arrangements, Marital Status

Births are on the decline

United States live births: 1990 - 2015

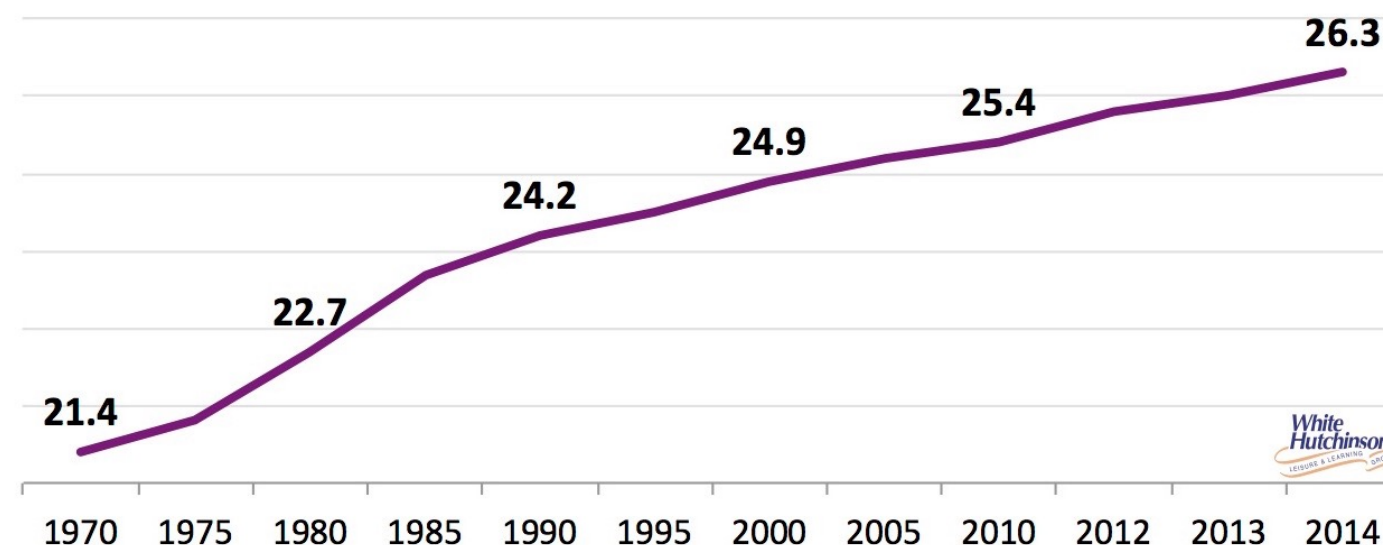


Source: National Vital Statistics Reports & White Hutchinson Leisure & Learning Group

Women are delaying their first child

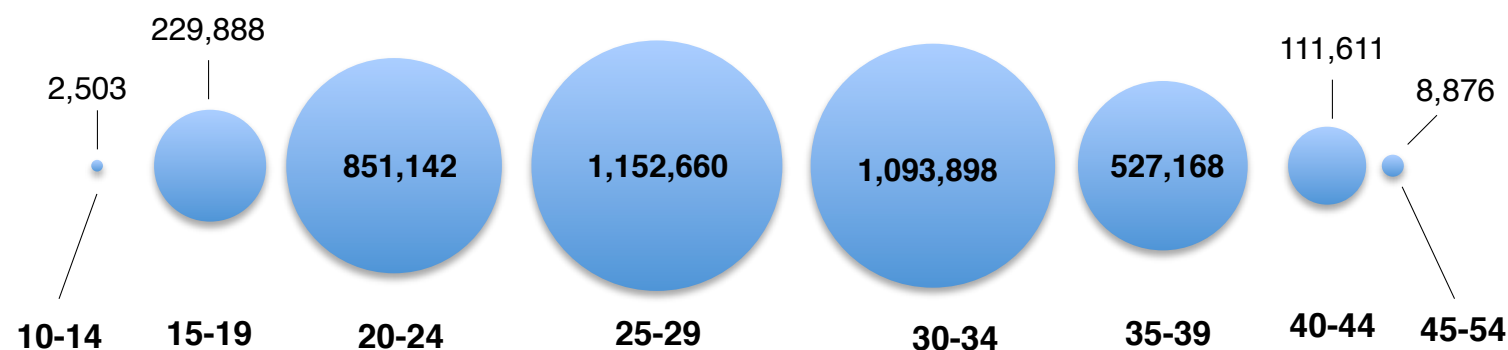


Average age when women have their 1st child (years)



Source: Centers for Disease Control and Prevention

Births by age of mother

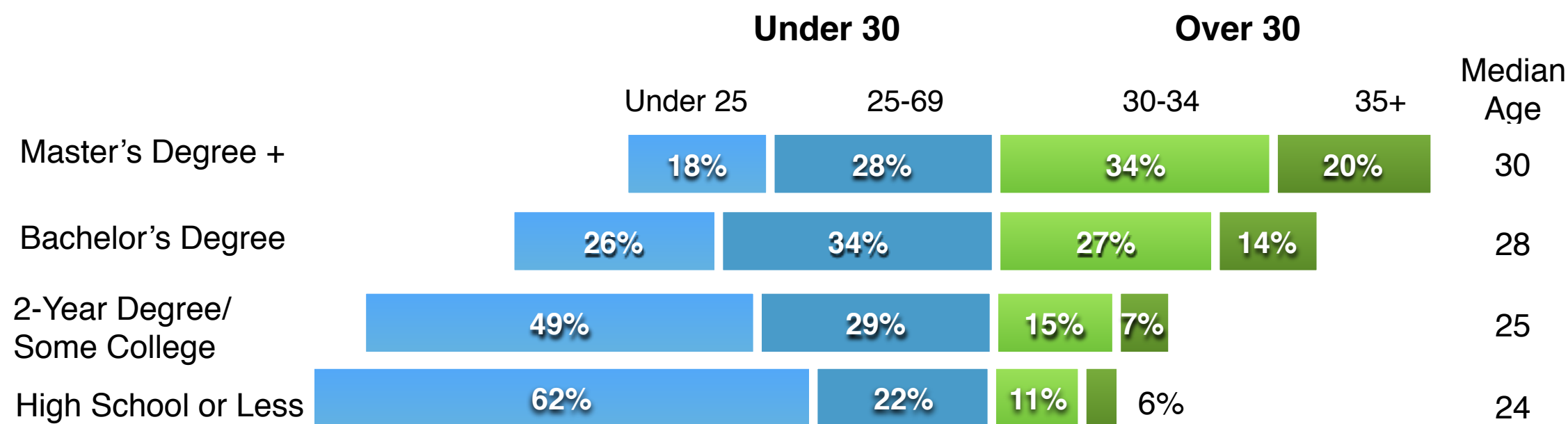


Source: U.S. Census National Vital Statistics Reports

Age of Mother

Higher socioeconomic women are delaying the birth of first child the most

Mother's age at birth of first child by educational attainment

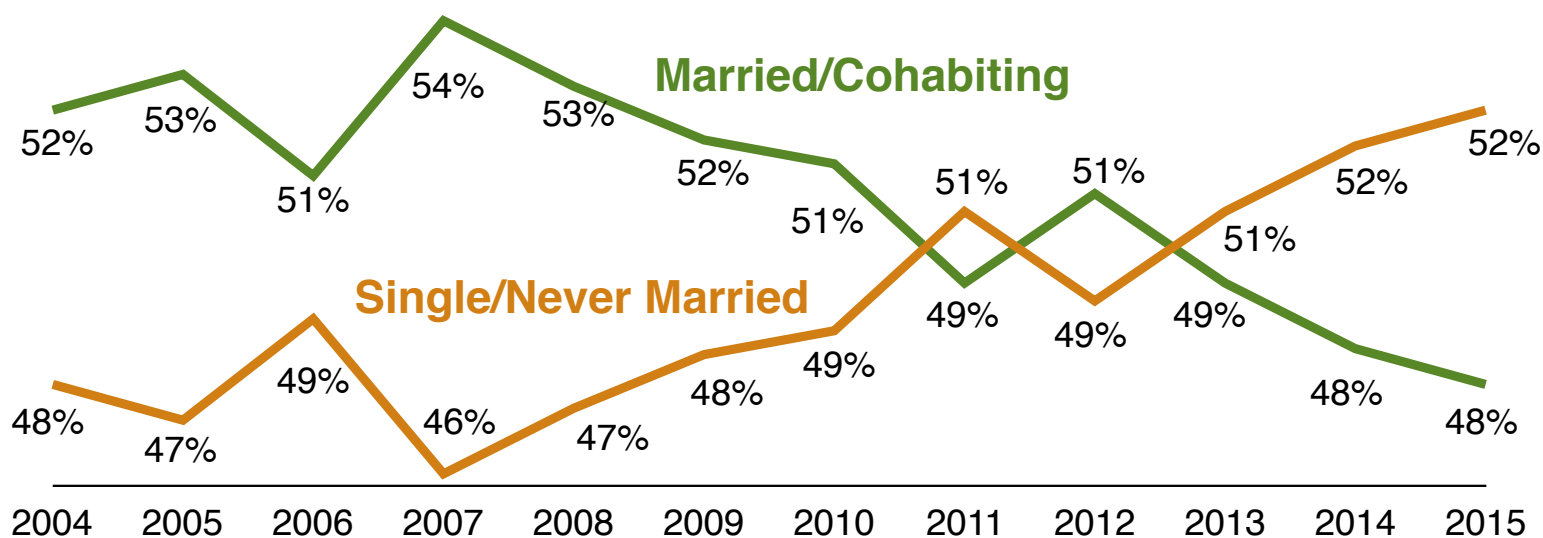


Note: Based on women ages 40-50 who have ever given birth

Source: Pew Research Center analysis of 2012 Current Population Survey June Supplement

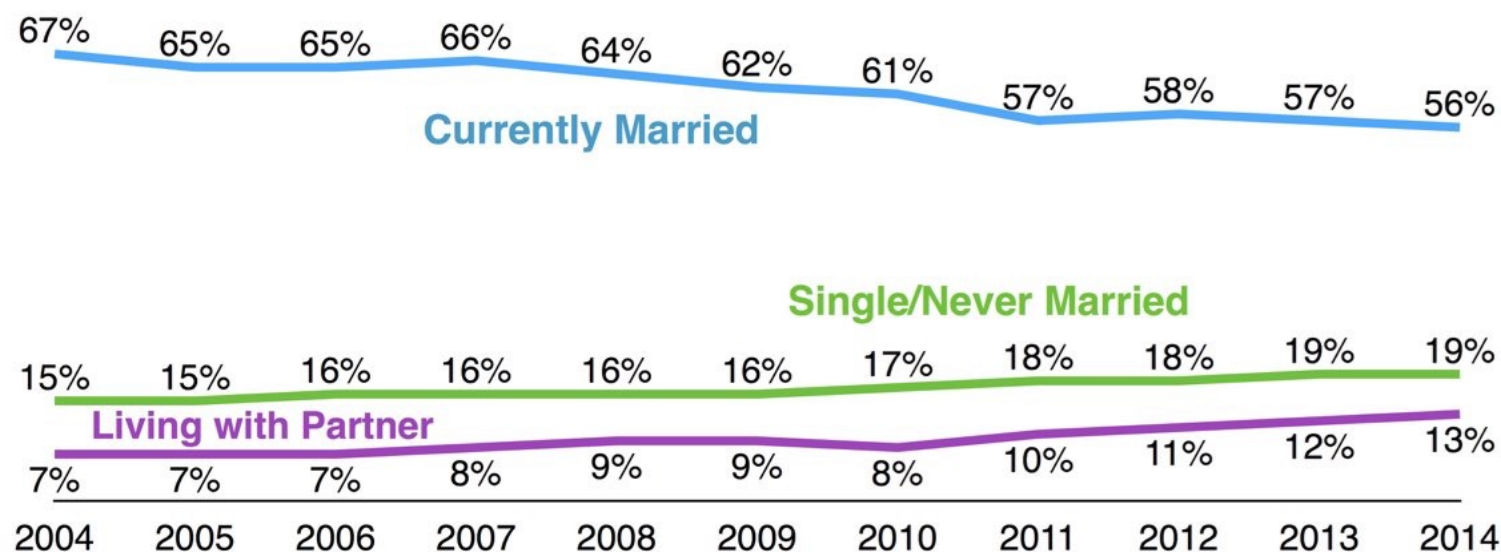
Rise of singledom

Marital status of U.S. adults, ages 25-29



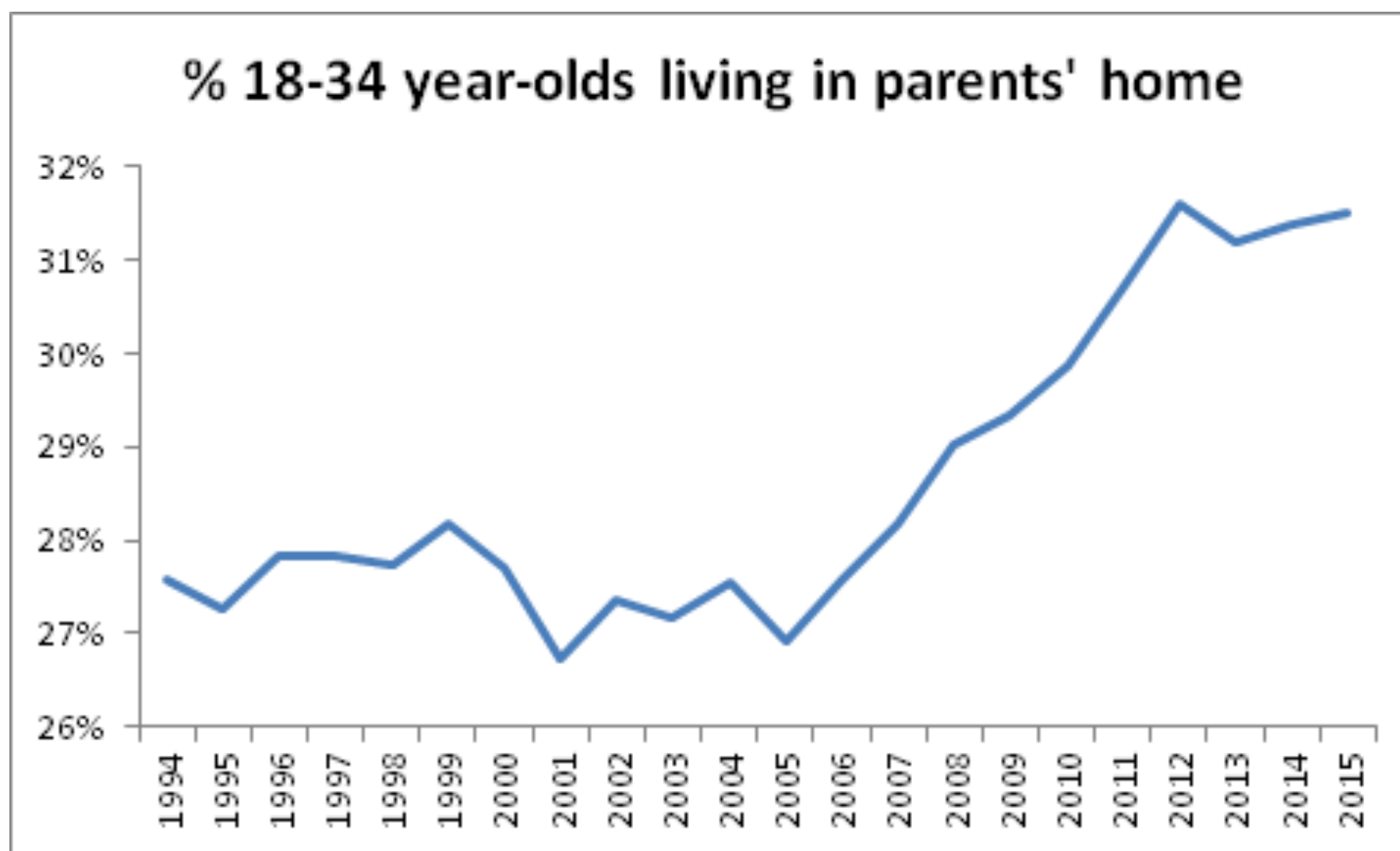
Source: U.S. Census Bureau, Current Population Survey

Marital Status of U.S. Adults, Ages 30-39



Source: Gallup (based on combined nation-wide Gallup polls conducted each year)

More young adults are living with parents



Recap

- ☒ Number of births on the decline
- ☒ Children as % of population declining
- ☒ Households with children as % of all households declining
- ☒ Delay in having first child - greatest delay with higher socioeconomic women
- ☒ Delay in first marriage
- ☒ Increasing % of young adults are single
- ☒ More young adults living in parents' home



**of 100 People in Suburban
Households with
\$75,000+ Income...**



**27% Live in Households with
Children Ages 5-14.
They will Visit your Family Venue**





**of 100 People in Suburban
Households with
\$75,000+ Income...**



45% Are Adults Ages 25-54
They will Visit your Adult Venue



**Some will even bring
their Children**

When choosing to go after the family market...



You Only Get This





Versus this with the Adult Market

If you want to attract families, you need to design for adults.

If you design for adults, you will get the kids and teens anyway.

If you design for adults, you need to serve alcohol.



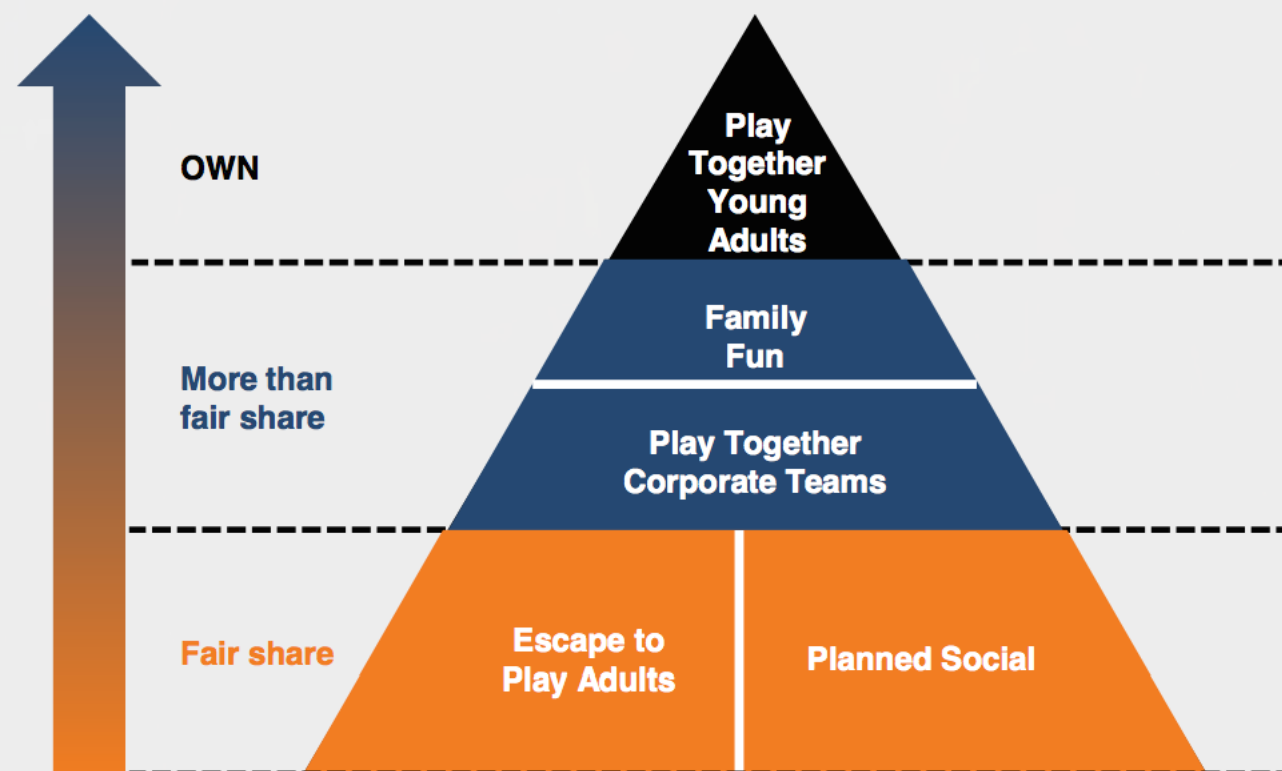
If you have a bar, you will get more adult parties & groups, corporate groups and walk-in adults.

If you have a bar, you will still get families during the daytime & early evening and adults in the later evening and into the night.

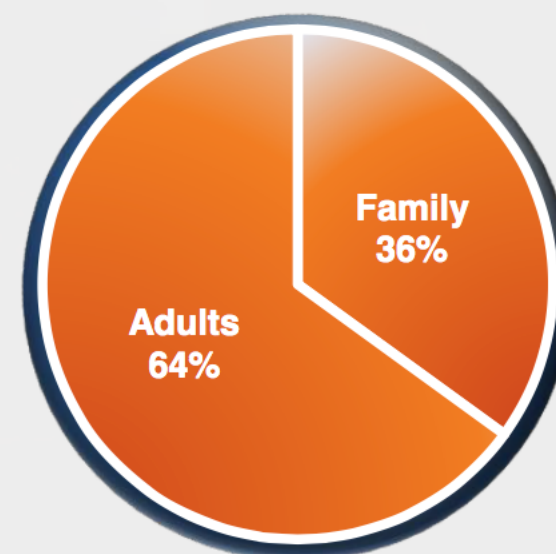
If you design for adults and have a alcohol, you will get far higher sales per square foot & be more profitable than if you only design for families.



Target Guest Focus and Occasions



Mix of Families and Adults



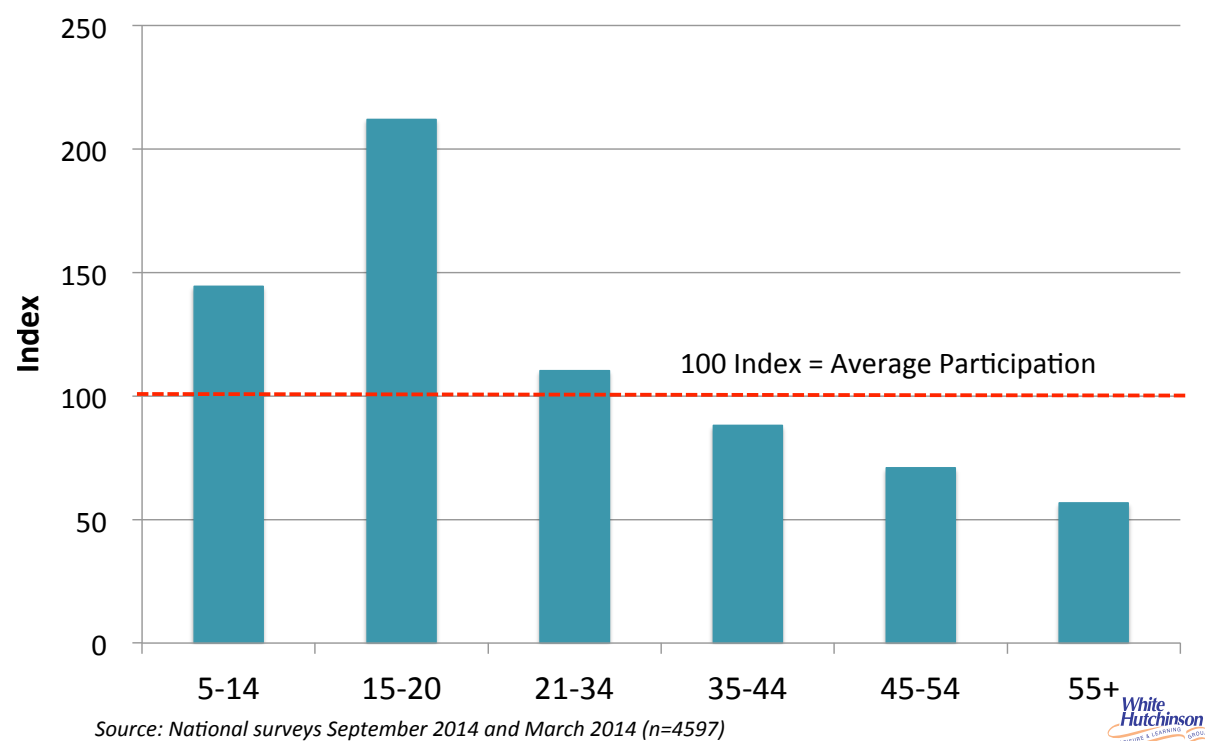
One of the great myths



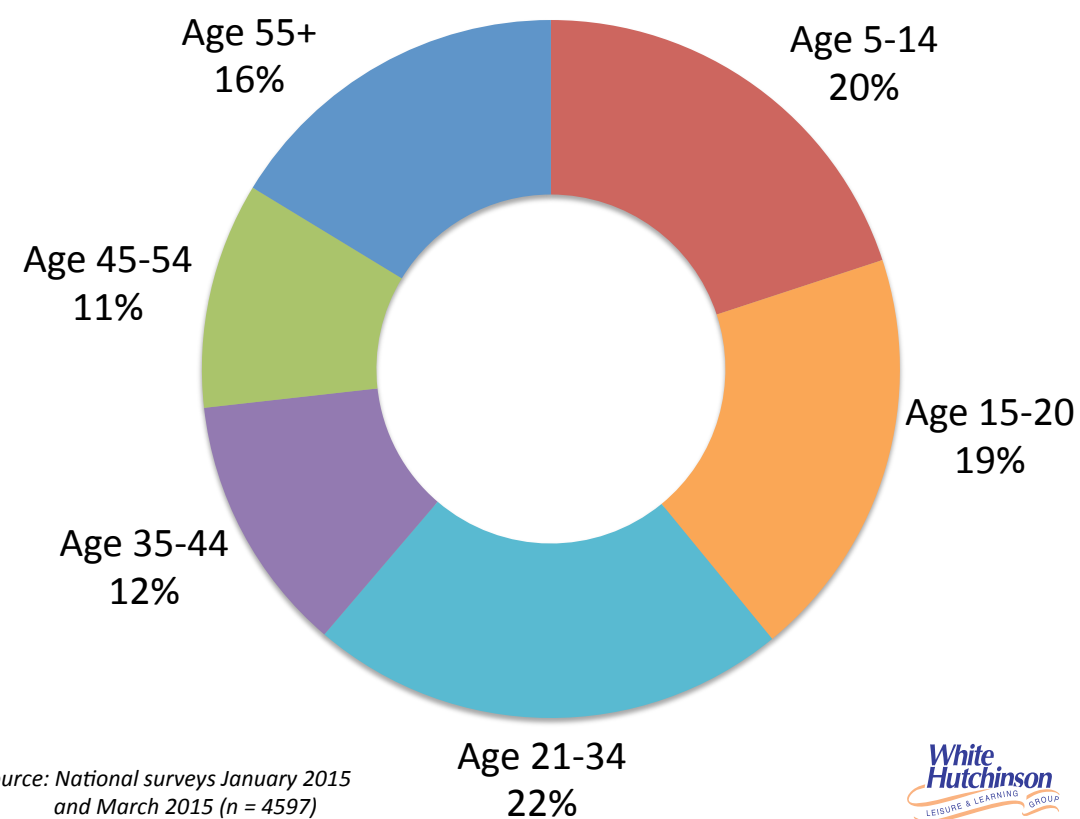
“The primary demographic for laser tag is between 6 and 14 years of age.”

Adults 21+ are 61% of laser tag participants

2014 Index of Indoor Laser Tag Participation by Age

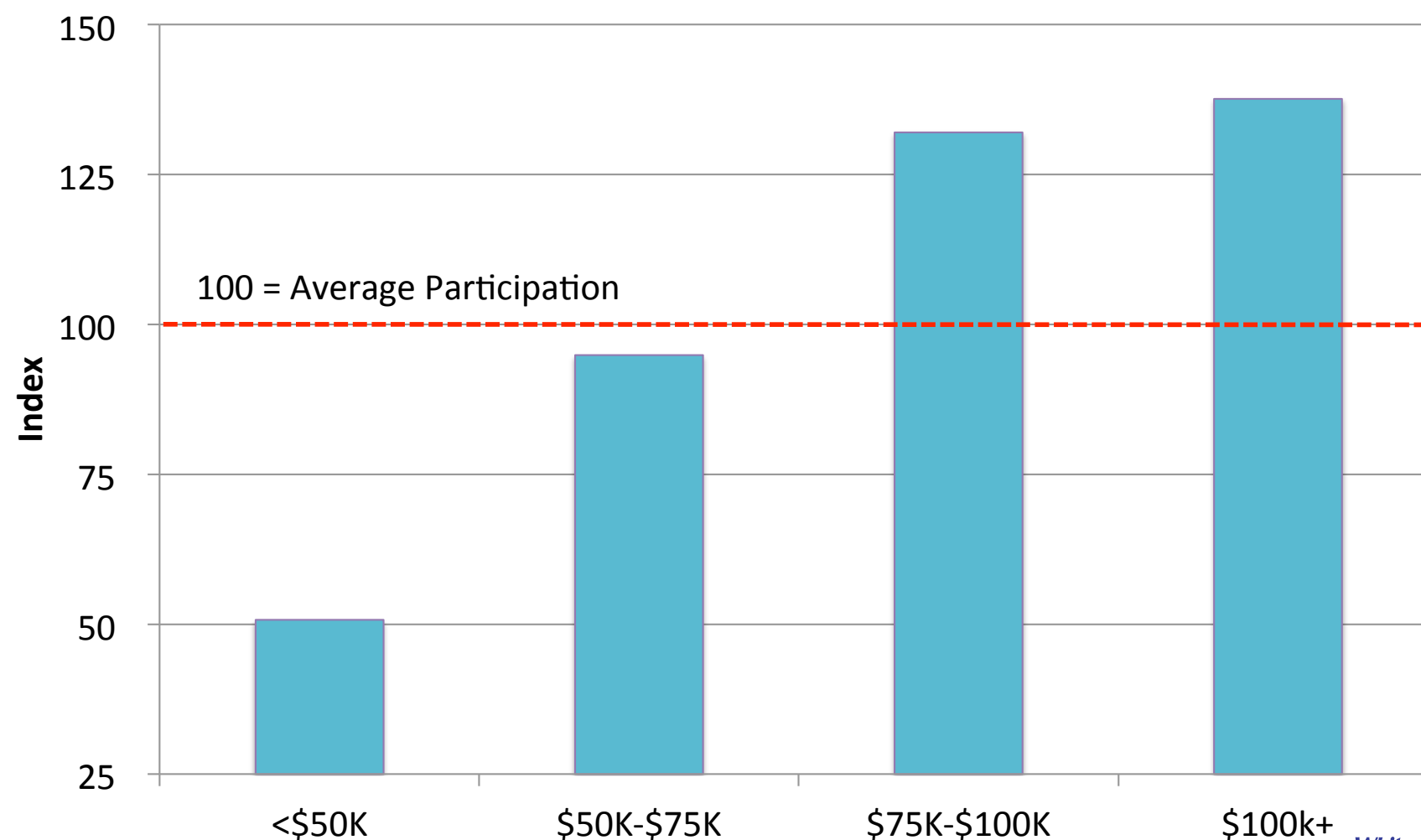


Share of 2014 Indoor Laser Tag Participants by Age



Higher socioeconomic households are the highest participants

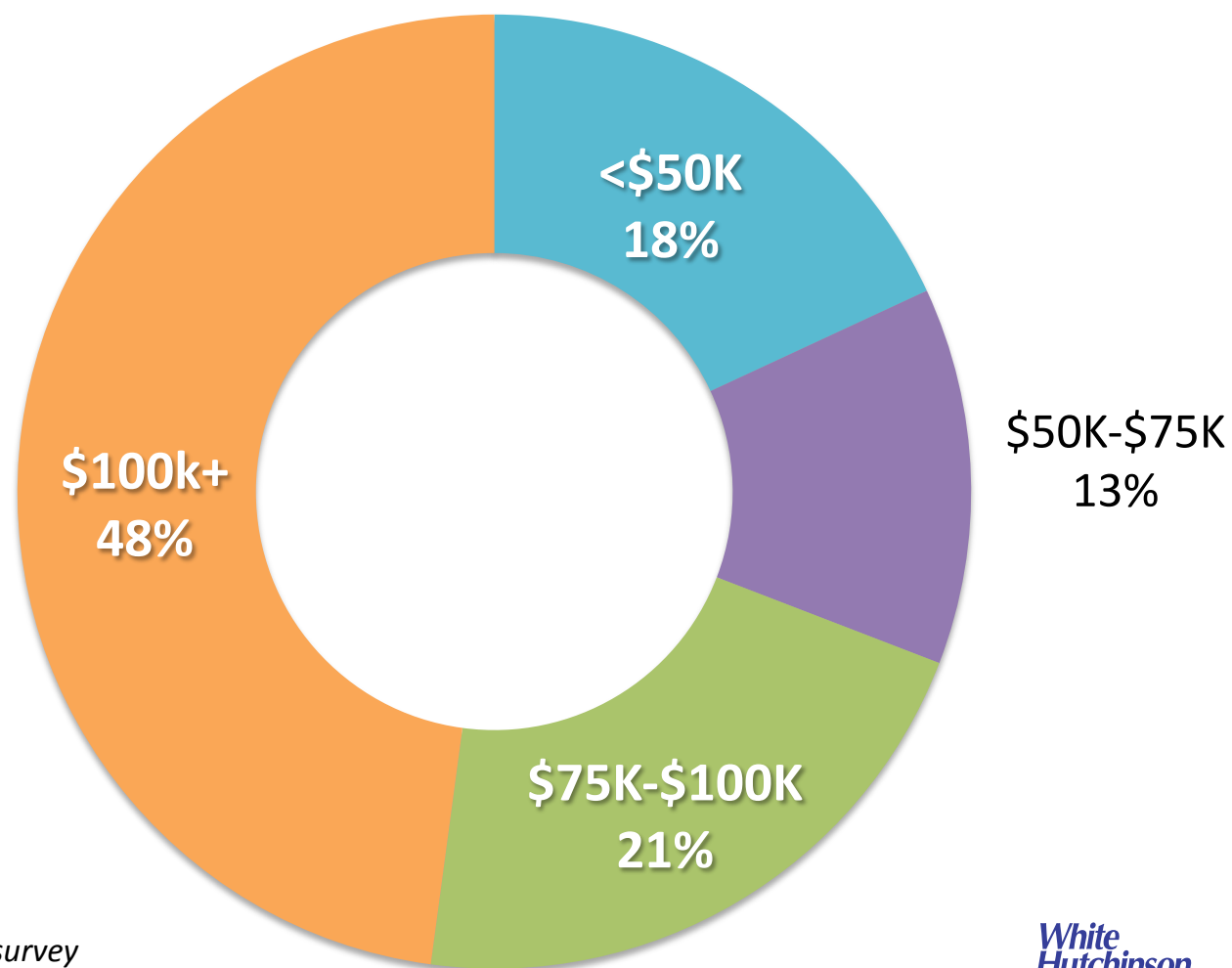
Index of Indoor Laser Tag Participation by Income



Source: National Survey September 2014 (n = 1018)

\$75,000+ households 69% of all participation

Share of Indoor Laser Tag Participation by Income



Source: National survey
September 2014 (n = 1018)

For adults, it's **NOT** just about LASERTRON!

It's back to the future by offering a great social & sharable experience for adults.



The food & beverage and socialization spaces are the anchor attractions as much as the Lasertron for adults.

Recap

If you design for children, that's who you'll get.

If you design for adults, you will not only get the adults, but also the family-children market.

The adult market is not only larger, but also more lucrative. And you'll get a lot of the family-children market as a bonus.

Randy White, CEO

Randy is considered to be one of the world's foremost authorities on feasibility, concept development, design and production of location-based leisure, entertainment, eatertainment and edutainment venues. Over the past 27 years, his company has worked for over 500 clients in 33 countries.

Over 100 of Randy articles have been published in leading entertainment/leisure magazines. Randy was featured on the Food Network's *Unwrapped* television show as an eatertainment expert, quoted as an entertainment/edutainment center expert in the *Wall Street Journal*, *New York Times*, *USA Today* and *Time* magazine and received recognition for family-friendly designs by *Pizza Today* magazine. One of the company's projects was featured as an example of an edutainment project in the book *The Experience Economy*. Randy is the editor of his company's *Leisure eNewsletter*, he blogs and tweets.

Randy has been a featured keynoter and speaker at numerous entertainment and leisure industry conferences throughout the world. Randy is presently a co-Regent and presenter at the 14-year-old *Foundations Entertainment University*.



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