

## Outlook for Attractions

Kelly Repass

*See World Parks and Entertainment*

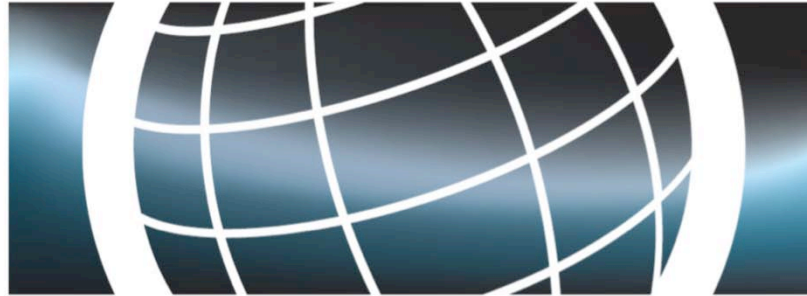
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# MARKETING OUTLOOK FORUM: A GLOBAL PERSPECTIVE



Presented by the Travel and Tourism Research Association

## **Outlook for Attractions**

Presented by: Kelly Repass, Sea World Parks and Entertainment

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**October 28-30, 2013 ~ The Drake Hotel ~ Chicago, Illinois, USA**

# Outlook for Attractions

**Kelly Repass**  
**Director, Consumer Research**  
**SeaWorld Parks & Entertainment**



# SEAWORLD PARKS & ENTERTAINMENT




# 11 Parks Across the U.S.



# Influencing Factors

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- Reinvestment = Competition
  - Blurred Lines
  - VIP experiences increasingly more popular
  - Sustain resident base and grow tourist markets
  - Looking ahead
- 

Reinvestment  
=  
Increased Competition



# Orlando Destination Performance

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## 2012:

- Total visitation +3.6%; Domestic overnight leisure +5.2%; Int'l +12.3%
  - 58% of leisure and 85% of int'l visitors went to a theme park
- Occupancy rate 68.8% (+1.8%); room-night demand +3.0%

## 2013 YTD:

- Occupancy rate 71.8% (+2.6%); higher than FL (68.4%) and U.S. (63.9%)
- Visitor forecasts: +1.5% total, 2.2% domestic overnight leisure, 4.4% int'l

## 2014 Outlook:

- Visitor forecasts: +1.8% total, 1.4% domestic overnight leisure, 4.3% int'l



# Fierce Competition in Central Florida



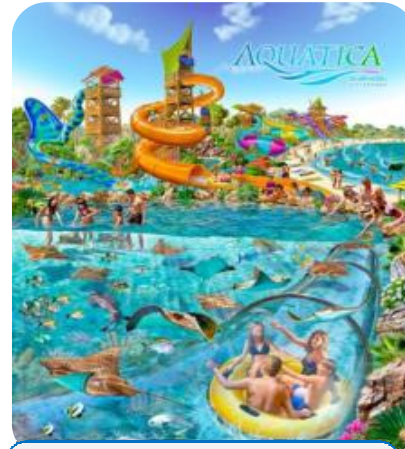
# Fierce Competition in Central Florida



# Southern CA Attraction Activity



Manta®  
SeaWorld



Aquatica™  
San Diego



SeaWorld San Diego



Cars Land  
Fantasy Faire Medieval  
Mickey & Magical Map



Transformers 3D-HD



Lex Luthor: Drop of Doom  
Full Throttle Coaster



Boardwalk w/Crazy Mouse  
Coaster and spinner rides

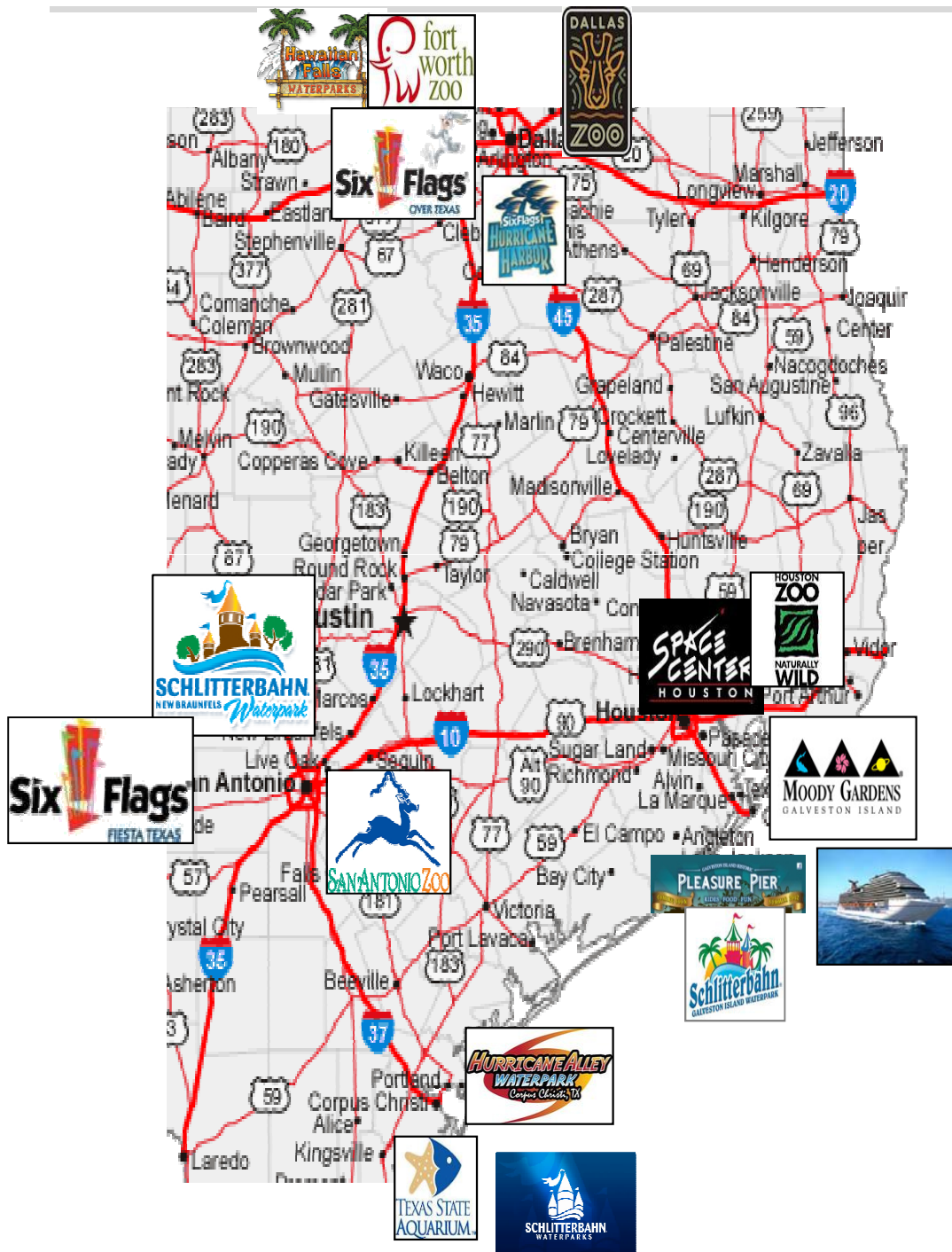


Cheetah Run  
Australian Outback  
(Zoo Koala habitat)



Legoland Hotel and Chima 4D

# Texas Attraction Competition Continues to Grow



- Six Flags Fiesta Texas
- San Antonio Zoo
- Schlitterbahn Water Parks (3)
- Hurricane Alley
- Texas State Aquarium
- Pleasure Pier
- Moody Gardens
- Space Center Houston
- Houston Zoo
- Cruise selections
- Six Flags Over Texas
- Six Flags Hurricane Harbor
- Hawaiian Falls Water parks (5)
- Dallas Zoo
- Fort Worth Zoo

# Blurred Lines



# SeaWorld's Antarctica

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SEAWORLD'S  
**ANTARCTICA**<sup>TM</sup>  
EMPIRE OF THE PENGUIN





# EMPIRE OF THE PENGUIN

PHOTO: JEFFREY M. HARRIS

# Integrating Attractions with Animal Habitats

Cheetah Hunt at Busch Gardens



Manta at SeaWorld San Diego



Turtle Trek at SeaWorld Orlando



# VIP Experiences and Behind the Scenes Tours Increasingly Popular



# VIP Experiences

## ➤ Examples of theme park VIP offerings:

- Private guided tour
- Front-of-the-line ride privileges
- Valet parking
- Theme park admission
- Reserved show seating
- Character/Equity dining and autographs
- Select meals/all day dining
- Souvenir ride or character photo
- Animal interactions/feeding



# Other Behind the Scenes Programs

- Broad range of interactive tour options and price levels
  - Behind the scenes tours
  - Up-close encounters with select animals
  - Keeper for the day program
  - Coaster experience tour
- Summer camps and sleepovers



# Sustain Resident Base and Grow Tourist Markets



# Sustain Resident Base

## ➤ Acquisition

- Offer a variety of pass options that provide value and flexibility
- Secure early commitment
- Provide strong pass benefits

## ➤ Motivate repeat visits throughout the year

## ➤ Maintain strong retention efforts



*Various single/multiple park passes with select benefits*



*Fun Card*

# Pass Member Benefits

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## ➤ Expansion of theme park pass member benefits

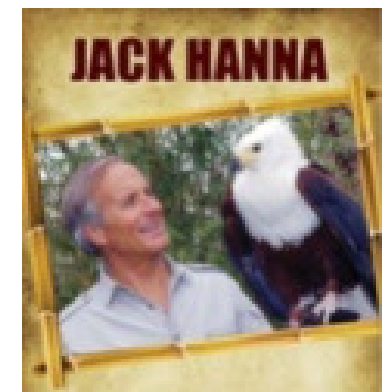
- 365 days of unlimited visits, no blackout dates for some
- Free parking
- Discounts on food, merchandise and in-park experiences
- Free/discounted special events
- Exclusive events and previews
- Unique park experiences
- Early park entry
- Discounted tickets for friends/family
- Reserved seating at select shows
- Pass member appreciation days
- Ride again privileges
- Pass member lines
- Various monthly offers
- Ongoing communication



# Leverage Special Events



BUSCH GARDENS®  
**Food & Wine  
FESTIVAL**



# Grow Tourists – Variety of Offers to Stimulate Demand

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## Consumers Perceive Value in Different Ways

### ➤ Multi-day/multi-park options

*2<sup>nd</sup> Day Free*

*3 Parks for the Price of 2*

*Park Hopper Ticket*

*3 Days for \$119*

*Park to Park Access Ticket*

*2 Visits for \$69.99*

### ➤ Promotional ticket offers

- Some via retail or other promotional partners

*\$50 Weekday Ticket*

*\$50 off 3-day ticket*

*Twilight Ticket*

*\$10/\$15/\$20 Off*

*Adults at Kids Prices*

*Buy One Get One*

### ➤ Special rates via travel packages

- Bundling of tickets, meals, hotel, upgraded experiences, etc.



# Looking Ahead

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- Continue to provide compelling experiences that engage consumers and inspire repeat visits
  - Adjust media and communication strategy as needed
  - Strengthen customer relationships
  - Balance healthy attendance levels and profitability
  - Maximize expected destination growth among tourists
  - Continue/strengthen partnerships
    - CVBs and state tourism agencies
    - Retail and travel industry partners
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