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Theme park visitor travel patterns

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University of the Pacific

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THEME PARK VISITOR TRAVEL PATTERNS

A Thesis

Presented to

the Faculty of the Graduate School

University of the Pacific

In Partial Fulfillment

of the Requirements for the Degree

Master of Arts

by

Ahmed Abdulrahman

December 1982

This thesis, written and submitted by

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Dated December 15, 1982

DEDICATION

To my parents

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CHAPTER ONE

Introduction

In recent years Americans have had to cope with recession, inflation, fluctuations in both energy availability and cost and, more recently, with increasing unemployment. Despite the generally gloomy economic situation, however, leisure-related expenditures have continued to rise and exceed those for defense. In fact, leisure-time expenditures represent the nation's number one industry (53)(81:ix). In 1981, leisure spending reached \$244 billion dollars, \$26 billion more than was spent the previous year (49).

Tourism represents an important aspect of leisure spending (17). Although the desire to travel remains great and tourism strong, there appears to be a trend of people taking more short trips and fewer long ones (74). Also, more travel is being done in private autos and recreation vehicles (39). Foreign visitors represent an important part of tourism, pumping billions of dollars into the economy, over and above that noted above for leisure spending (49).

This study is concerned with the amusement/theme park business which, according to Chubb and Chubb, increased rapidly during the seventies, by as much as four to six million people per year (10:378). However, attendance has

been on the decline ever since it peaked in 1979 (18)(24)(52) (66). In an attempt to turn the attendance around, theme park marketing has become more competitive. The emphasis has been on "trying to outdo others" with new big thrill rides (35). While marketing strategies have not been limited to introducing new thrill rides, the latter have been noted to make a difference (84). According to September 6, 1982 NBC Nightly News, attendance at theme parks is generally down this year even at such well known places as Disneyland and Marriott's Great America. The exception noted, was for a major park that did introduce a new big thrill ride.

This study was undertaken to shed light on the nature and travel patterns of theme park participants. While not a marketing study, it was believed that the findings would reveal useful implications for theme park marketing.

Statement of the Problem

This study was designed to address several related problems.

1. To determine the difference, if any, between national travel patterns and those of 1982 Easter Week visitors to Marriott's Great America (Santa Clara, California) and Marine World Africa U.S.A. (Redwood City, California).

2. To determine the differences, if any, between the 1982 Easter Week travel patterns of visitors to Marriott's Great America and Marine World Africa U.S.A.

3. To determine the difference, if any, between the distances visitors traveled to Marriott's Great America and Marine World U.S.A. during the summer of 1981 and the 1982 Easter Week.

The problems dictated the necessity to address several subproblems.

1. To determine the distances visitors traveled to Marriott's Great America and to Marine World Africa U.S.A. during the 1982 Easter Week.

2. To determine the mode of transportation used by visitors to Marriott's Great America and to Marine World Africa U.S.A. during the 1982 Easter Week.

3. To determine the percentages of visitors to Marriott's Great America and Marine World Africa U.S.A. traveling less than and more than 300 miles during the 1982 Easter Week.

4. To determine the percentages of visitors to Marriott's Great America and Marine World U.S.A. utilizing various modes of transportation during the 1982 Easter Week.

5. To determine the difference between the distances visitors to Marriott's Great America traveled during the summer of 1981 and the 1982 Easter Week.

6. To determine the difference between the distances visitors to Marine World Africa U.S.A. travel during the summer of 1981 and the 1982 Easter Week.

The study was also designed to allow for the following analyses relevant to the 1982 Easter Week visitors to

Marriott's Great America and Marine World Africa U.S.A.:

1. Differences in geographic residence of visitors-- i.e., within California, out-of-state, out-of-country (foreign).
2. Differences in participant age groups.
3. Differences in the size of travel parties.
4. Differences in travel companions of visitors-- i.e., alone, with family, with friends, with tour group.
5. Difference in factors which influenced visitation to the theme parks--i.e., TV advertising, radio advertising, newspaper advertising, promotional flier, discount coupons, family members and/or friends.

Importance of the Study

Tourism and the amusement park/theme park business are closely related. Both are affected by the state of the economy and energy availability and cost and both benefit from strong foreign as well as domestic travel. Significant changes in patterns of travel are studied carefully by marketing experts in both fields, as they strive to maintain their level of business. An added reason for making this study important was the fact that this researcher is a foreign student from Kuwait, a nation currently completing a large amusement park complex similar to Disneyland. It was believed, therefore, that a study of American amusement/theme parks would not only benefit the management of the parks selected for the study but, also,

that it would be of benefit for those charged with marketing the new Kuwait business.

Tourism is currently ranked as the number one business in both the United States and the State of California (53 and 71). Forty-six states have reported travel and tourism to be "in the top three sources of income" (53). While the amusement park industry has enjoyed a fair share of the tourism market, a "slow down" in attendance has become a cause for concern (18)(50)(63). The national theme park attendance for 1981 revealed "an unexpected drop in foreign visitors due to the dollar's strength abroad..." (3). The importance of foreign visitors to theme parks has been demonstrated at Disneyland, where the percentages of foreign visitors increased from 3 percent in 1965 to 10 percent in 1980 (78). As noted by Reynold and others "for some countries travel is the most important source of income" (53). Although the theme park market was almost exclusively American until the 1970's, permanent parks may now be found in Europe, the Middle East, South America and the Far East (57). Kuwait's nearly completed "Entertainment City" is among the latest such developments. It was "conceived as a showplace for the Middle East." (77); and, while it was inexpensive to build (\$80 million) because the government donated the land, its success will depend upon the ability to draw foreign visitors.

The literature on the state of the economy and its affect

on leisure spending, particularly for amusements, is mixed. By the end of January, 1982, the economy had fallen for nine straight months (16). Shortly thereafter, the national unemployment figure had risen to 9%, while in California, the unemployment level was 9.4% (46). At about the same time, California suffered a new economic blow with the announced closing of two General Motors Plants (32). According to one source, the unemployment problem was more severe than any "since the Great Depression" (63). And, although inflation was noted to no longer be a "double-digit nightmare," (70) it was said to have been replaced by high interest rates.

Despite the state of the economy, leisure spending in America continues to outpace that for the military. In 1981, Americans spent \$244 billion for leisure (49). In a 1977 report describing record revenue levels for amusement/theme parks, it was noted that while sales of leisure goods fluctuate relative to the status of the economy, expenditures for entertainment are good even during slow economic periods (52). And further, another source suggested that even when the economy is down, people continue to spend for recreation and leisure goods--especially sports equipment (49). A good example of entertainment skyrocketing in interest and expenditure is that of video games (44). Players reportedly spent 5 billion dollars on this form of amusement in just the last quarter of 1981, excluding an additional billion dollars spent for home equipment (65). The latter equipment expenditure

nearly equals the estimated 1981 expenditures at the major amusement/theme parks (28 and 65).

While Disney parks had a good year in 1980, the recession appeared to stem the projected year's growth (18). And, while the major amusement/theme park attendance was earlier noted to peak in 1979, both of the theme parks in this study experienced attendance drops in 1979 and 1980 (23 and 58). Overall the theme park participation level was reported to be 80,000,000 in 1980. It is this latter level that theme park management is striving to maintain (18). However, even the well known Disney parks showed attendance drops in 1981, and during the early months of 1982, due to a decrease in out-of-state travelers (39).

With respect to the two theme parks under study, it was interesting to find that the Manpower and Utilization Manager at Marriott's Great America and the Vice-President of Marketing for Marine World Africa U.S.A. foresaw the expected 1982 Easter Week attendance differently. At Marriott's there was a projected increase--i.e. 154,800 as compared with 140,980 during the same period in 1981 (58). At Marine World the estimate was to hold steady--i.e. maintain the 1981 attendance of 39,800 (23).

One source indicated that vacations are now viewed as a necessity but that getting away often means taking short vacations near home (49). It was noted that in light of this 1981 trend, theme parks were expected to gain in attendance (49). Another source indicated that high air fares during

the summer of 1981 seemed to slow traffic "in major tourist destinations with high concentrations of theme parks" (35). And, while it has been predicted that air travel may be up slightly by those who can afford it, more people will travel by private car and recreation vehicles in 1982 (5 and 39). The tourist picture for San Francisco during the early months of 1982 was dismal (16). It should be noted that although gasoline appeared to be plentiful and reasonably priced, at the time of this study, the cost of operating cars was noted to be continuing to rise (28). Still, when modes of travel are compared and include enroute food and lodging, a 1981 study showed that car travel was the second lowest in cost (45).

The amusement/theme park industry has been put in the position of having to come up with some strategy to attract both new and repeat customers, if it is to meet the cost of building, operating and expanding theme parks (10:381). In addition to studying the travel patterns of subjects and comparing them with the latest available census data (1972) and comparing the travel patterns of the two sub-groups, the study includes analysis of data which could further help marketing managers as they attempt to stem the downward trend in their theme park attendance. These supplemental data will reveal the age groupings of participants and whether they are participating alone, with family, with friends and/or with a tour group. Other data believed to be useful for marketers are identification of the factors influencing subject's participation--i.e. discount coupons, family, friends,

promotional fliers, special TV, radio and/or newspaper advertising. The researcher believed that by gathering data during the Easter Week, subjects would include a good cross-section of local people and vacationers from a distance--i.e. that the source of data would be broad rather than narrowly based.

Scope of the Study

This descriptive-survey study was concerned with identifying and comparing the travel patterns of 1982 Easter Week visitors to two Northern California theme parks--both with one another and with the national travel patterns. The emphasis of the study was on distances participants traveled from their homes and their modes of transportation. The distances traveled were also compared with the individual park distance data for the summer of 1981. The study further identified and compared the age and companion groups (if any) of participants and the factors most influencing their visit to the theme parks being studied.

Data were obtained by administration of a questionnaire instrument to two stratified random samples from Marriott's Great America (Santa Clara, California) and Marine World Africa U.S.A. (Redwood City, California). The total number of questionnaires administered was 600--half at each of the parks. The 300 questionnaires at each park were administered on two separate days--one weekend day and one mid-week day. By random selection, questionnaires were administered at

Marine World on the first Sunday of the Easter Week and on Wednesday--150 each day. At Marriott's Great America the data were gathered on Thursday and the last Sunday of the same week. Data were analyzed using percentages and Chi Square tests for significance of difference where appropriate. (A copy of the questionnaire is located in the Appendix.)

Delimitations of the Study

This study was not concerned with:

1. participants other than those in the two sample groups;
2. the sex of the respondent; and,
3. the social class of respondents--i.e. their education, work and income.

It was believed that the study could be limited by:

1. refusal of subjects to respond to the questionnaire;
 2. failure of respondents to complete all questions;
- and, by
3. lack of complete honesty on the part of respondents.

Assumptions and Hypotheses

The positions put forth by the researcher were based on a review of pertinent literature and recommendations of selected experts.

Assumptions

Assumptions upon which the study was based were:

1. A closed-end questionnaire would encourage sample subjects to participate in the study and provide complete and honest data.
 2. Stratified random sampling would provide a good cross section of each park's participants.
 3. Obtaining data from both weekend and mid-week participants would provide samples representative of both local and out-of-the area travelers.
-

Hypotheses

The following hypotheses were put forth pertinent to the outcome of the analysis of data:

1. Marriott subjects traveled both significantly less than and significantly more than 300 miles when compared to Marine World subjects.
2. Travel by Marriott subjects within a 51-300 mile radius significantly exceeded that of Marine World subjects.
3. The combined samples significantly exceeded the national percentage rate of travel within 300 miles and fell significantly short of the national percentage traveling beyond 300 miles.
4. Modes of transportation were significantly different for sample groups--i.e. Marriott subjects traveled by private auto more and by air less than Marine World subjects.
5. The combined subject groups significantly exceeded the national percentage of travel by private auto and fell significantly short of the national percentage of air travel.

6. The travel patterns of the combined sample groups were significantly different from national travel patterns--i.e. subjects evidenced more travel of less than 300 miles, greater use of the private auto and less air travel than was the case nationally.

7. Travel patterns between subject groups were significantly different--i.e. Marriott subjects evidenced greater travel within 51-300 miles than Marine World subjects, and, Marine World subjects evidenced greater air travel while Marriott subjects evidenced greater travel by private auto.

8. Marriott subjects traveled significantly more frequently within 51-100 miles and significantly less within 50 miles and over 300 miles than visitors during the summer of 1981.

9. Marine World subjects traveled significantly more frequently within 51-300 miles and significantly less within 50 miles than visitors during the summer of 1981.

10. Both subjects from Marriott's and Marine World showed a significant increase in trips between 51-300 miles and a significant decrease in trips of less than 50 miles, compared with distances visitors traveled during the summer of 1981.

11. Marine World included significantly more out-of-state and foreign subjects than Marriott's.

12. Marine World attendance included significantly more older and significantly fewer younger visitors than Marriott's.

13. Marine World subjects traveled significantly more with family and less with friends than Marriott's subjects.

14. Subjects in both samples were most influenced to visit Marriott's and Marine World by TV advertisement, family and friends--i.e. of the influences available on the questionnaire, the above three would rank highest for both groups.

Deduced Consequences

The literature revealed that 85% of the population travel long distances (i.e. over 300 miles) only during planned vacations of at least a week; and, that 60% of people stay within a 300 mile radius of home for weekend travel. Previously noted was the trend of taking more short vacations near home. At the same time, it was duly noted that foreign visitors frequently visited Marine World (23). If these sources are correct, there should be more subjects traveling more than 300 miles to Marine World and fewer traveling less than 300 miles. Since the study was done during a vacation period (Easter Week), it was believed that more subjects would travel between 51-300 miles to get to Marriott's. Vacation and other distance trends noted above also led the researcher to believe that the combined sample groups would exceed the national percentage of trips within a 300 mile radius and fall short of the national percentage of trips beyond 300 miles. Another factor influencing this line of thought was the glum report on tourism in the San Francisco area (16).

Under the Importance of the Study, it was noted that

travel by private auto is on the increase, while it was only suggested that air travel might increase for those who could afford it. Also, since the national percentages for modes of transportation, nationally, stem from 1972 census data, it was believed that subject travel by private auto would far exceed the national percentage. Since foreign visitors, and possibly out-of-state visitors appeared to be a greater factor at Marine World, it was believed possible that subjects from the sample would reflect greater use of plane travel. It was further believed that the geographic distribution of subjects' homes would reveal more out-of-state and foreign locations for Marine World subjects than for Marriott's subjects.

Due to the uniqueness of Marine World (noted for sea and African animal life) and the market focus placed on education (7 and 23), it was believed that subjects from Marine World would include fewer teenager/youth and more older adults than subjects from Marriott's. This conclusion was also influenced by the appeal of the park to foreign and out of area visitors. Following up this line of thought, it was further believed that subjects at Marine World would more likely travel with family members than with friends--i.e. parents with small children, and possibly, their own parents. Marriott's, on the other hand, has thus far concentrated on the youth and young adult markets (58 and 59). Also the emphasis at Marriott's is on fun rather than on education. For these reasons, it was believed that Marriott's subjects would

more likely be traveling with friends and/or family.

Following up on the latter, and adding the fact that local TV stations have daily carried advertisements for both Marine World and Marriott's since early Spring, it was believed that the top three factors influencing subjects to visit these parks would be TV advertising, family and friends.

Definition of Terms

The following terms were defined to facilitate the readers' comprehension of the study.

Marketing

"Marketing is a human activity directed at satisfying needs and wants through exchange processes. Key components of understanding marketing are needs, wants, demands, products, exchange, transactions, and markets" (34:6).

Traditional Amusement Park

Traditional amusement parks are usually located at the edge of a city. They typically contain roller coasters and other rides, snack centers, arcades and games of chance. Some offer water fun--i.e. swimming and/or water slides; some have aquariums, dance pavilions, etc. The setting of most traditional parks is drab and maintenance is minimal. Visitors usually pay separately for each ride or other amusement (10: 378-379).

Theme Park

Theme parks have all the amenities found in traditional parks, "but they are cleverly tied together and promoted as a coordinated package of attraction developed around a single theme" (10:379). These parks are usually located "between major metropolitan areas and near . . . interstate highways" (10:379). Some theme parks "contain wild animals in conditions simulating their natural habitats--even animals from such places as Africa" (26:146). Unlike the traditional amusement park, the admission fee to a theme park includes "the cost of all rides, shows, and exhibits" (10:379). Another difference is that the environment is beautifully landscaped and immaculately maintained. Still another major difference is that the staff is young, clean-cut, and especially trained to be friendly and helpful (10:379).

Travel Patterns

Travel patterns, as used in this study, include both the distances people travel and the modes of transportation they use.

Summary

Within the first chapter, the study problem has been introduced, specifically stated, and supported. The scope of the study was explained and delimitations were noted. Also presented were study assumptions, hypotheses and definitions of terms.

The subsequent chapter contains a review of pertinent literature, followed by a chapter devoted to explaining the method and procedures followed. The study data are located in Chapter 4, along with a discussion of the findings. The final chapter contains a summary, study conclusions and recommendations.

CHAPTER TWO

Review of Resources

The review of resources included findings from the literature and from management personnel at the two theme parks under study. The study was prompted by concern about the widely reported decline in theme park attendance. In addition to assessing participation levels, the review identified factors which appeared to be related to the decline. Included in these factors were trends in leisure travel patterns, the major focus of this study. The review further identified theme park marketing measures which have been taken or are under consideration to reverse the decline in attendance. The presentation of resources was organized under the following major headings: (1) Theme Park Attendance: Trends and Status; (2) Theme Park Attendance: External Considerations; (3) Theme Park Attendance: Internal Considerations.

Theme Park Attendance: Trends and Status

During the 1970's there was a phenomenal growth in amusement park attendance. Chubb and Chubb recently reported that "25% of Americans visit amusement parks each year" (10:378).

The greatest growth in attendance appeared to occur at 30 major American theme parks, which showed increases up to 6 million people through 1978 (see Table 1). The growth between 1978 and 1979 was slowed to 2 million, and there was a drop of 1 million in 1980. Although Standard and Poor Industry projected 1981 attendance at 81 million (18), a recent report indicated that this projection would not be fulfilled and, further, that attendance would not turn around in 1982 (39). In August of 1981, Kreisman reported no expected theme park growth for 1981, due to the slow economy (35). One of the major theme parks, Disneyland, reported a 9% attendance drop during the first quarter of this year (1982), which was attributed to a decrease of foreign visitors (39). This seemed to reinforce an attendance concern Disney Parks noted back in 1980 (19). At Marriott's Great America, where attendance was down the first 5 months of this year (1982), blame was placed on both the bad economy and the weather (39). According to Jan Shultz, senior vice-president at Sea World, the overall attendance in a park is unpredictable i.e.--in one area a theme park may be doing well while another park in the same area may have fewer visitors (35).

The rise and decline of attendance at the two theme parks used for this study showed variations from attendance figures previously presented for the 30 major theme parks. As noted in Table 2, both Marriott's Great America and Marine World Africa U.S.A. revealed growth in attendance during the 3 year period from 1976 to 1978. Within this

Table 1

Five Year (1976-1980) Attendance and
Expenditures for Thirty Major Theme
Parks in the United States

Year	Attendance in millions	Expenditures
1976	69,300,000	832 millions
1977	73,000,000	900 millions
1978	79,000,000	950 millions
1979	81,000,000	1.1 billions
1980	80,000,000	*1.2 billions
1981 Estimated attendance		81 million

* Increase expenditures is related to per capita spending--
i.e. from \$13.50 to \$15.00.

Source: Standard and Poor Industry, 1977-1980.

Table 2
 Six Year (1976-1981) Attendance Figures
 For Marriott's Great America &
 Marine World Africa U.S.A.

Year	Marriott's Great America	Marine World Africa U.S.A.
1976	2,396,966	631,322
1977	2,397,158	730,646
1978	2,453,231	808,477
1979	2,233,982	775,804
1980	2,014,111	752,567
1981	<u>2,024,531</u>	<u>880,000</u>
Totals	12,519,979	4,628,816

Source: M.G.A. - Manpower Utilization
 M.W.A. - Marketing Manager

period, Marriott's growth was minimal between 1976 and 1977 and sizeable between 1977 and 1978. Marine World, on the other hand, enjoyed a great attendance increase between 1976 and 1977 and a good increase between 1977 and 1978. In 1979, when national theme park attendance continued to show growth, the attendance at Marriott's and Marine World declined. Like the national theme parks, both study theme parks showed attendance declines for 1980. While the evidence suggested that national theme park attendance would not increase as had been estimated in 1981, Marriott's Great America had a slight increase in attendance. The 127,433 increase in attendance in Marine World, between 1980 and 1981, was nearly as great as the increase they had between 1976 and 1977.

Although both Marriott's Great America and Marine World managed attendance growth in 1981, management personnel at both parks were somewhat pessimistic about the outlook for 1982. Since this study was conducted during Easter Week, the researcher requested both parks' attendance figures for the same period in 1981 and management projections for the 1982 Easter Week. As noted in the Importance of the Study, no attendance gain was expected at Marine World. At Marriott's Great America a small gain was anticipated (58); however, the researcher was informed at the conclusion of the study that attendance dropped rather than increased (59). Post-study data were not available from Marine World Africa U.S.A.

Theme Park Attendance:
External Considerations

As noted under the Importance of the Study theme parks benefit from tourism, including both foreign and domestic travel. It was also noted that theme park attendance should be enhanced by the trend in America to take vacations of shorter duration near home. The review of the literature also revealed that tourism and theme park attendance are affected by such factors as energy availability, transportation costs, and the overall state of the economy--e.g. inflation, recession, interest costs, unemployment, etc. These inter-related external factors are discussed in this section of the review.

Tourism in the United States represents a 130 billion dollar industry (71). According to Reynold and others, tourist travel and vacation business is the "largest single item in leisure expenditure" (53). In California, where tourism is the state's number one business, "United States residents spent 19.1 billion dollars...in 1979" (71). Of the \$12 billion spent by foreign travelers in 1980 (49), \$2 billion was spent in the state of California (71). With respect to foreign tourism, it was noted that as the value of the dollar increases the number of foreign visitors decreases (35). This, in turn, negatively affects attendance at theme parks (35). In San Francisco, where tourism is "one of the city's most important industries" (16), tourism for the first few months of this year (1982) was described as "somewhere

between slow and painful" (16). Although some pick-up in tourism was expected, it was estimated that the total would be less than for 1981 (16). It was noted that when tourism is good, San Francisco raises \$60 million in taxes and employs 60,000 people in the industry (16).

In 1981 it was reported that travel expenses had increased at a greater rate than any other industry. The U.S. Data Center reported that the overall inflation index for travel expenses had risen 20.7%. Specific increases included 39% in oil prices, 38.4% in air fares, 17.7% in railway fares, 14.3% in bus fares, the cost of staying away from home 14.2%, and 9.9% for eating out. During this period overall inflation rose to 13.5% (45 and 73).

The cost reduction for gasoline and oil did not immediately affect commercial travel (1 and 25). For example, in the summer of 1981, high air fares were noted to be slowing traffic "in major tourist destinations with a high concentration of theme parks" (35). The number of occupied seats in 1979 was 63% and by 1981 the seat occupancy was down to 58% (79). Bad news for the airlines has continued in 1982 (5 and 67). It was noted that these decreases in air travel were a result of a variety of factors: cost of energy, decontrol of the airline industry, the air controller strike, the shaky economy, and the recession (11)(14)(40)(79). Although most major airlines had large deficits, they offered discount fares through the 1981 holiday season, notably one of the busiest times of the year (41).

The availability and cost of gasoline have fluctuated during the last several years, especially since 1979, when gasoline was both short in supply and high in price (23). By the summer of 1981, the world was "awash in oil" and foreign producers were slashing prices (4). Several sources reported a continuing drop in gasoline prices through the spring of 1982, which included the period during which the data for this study were obtained (6)(60)(61)(62). Despite availability and dropping prices, the U.S. government predicted that by 1985 gasoline prices might be as high as \$2.20 per gallon (68 and 75).

A noted result of recent fluctuations in the availability of gasoline was a modification of American driving habits. Between 1978 and 1980 recreational driving fell by 25% (29). Overall, travel by automobile dropped 6% in 1980 (29). Unlike the increase in travel that occurred after the 1973 oil embargo, which hurt the American tourist industry (64), the seemingly unlimited supply of gasoline has not resulted in the resumption of previous levels of driving and travel.

On the other hand, Americans have come to view vacations as a necessity rather than a luxury (49). The major difference in vacation travel is that of taking an increased number of short vacations close to home--i.e. within a 300 mile radius (42). Longer trips are reserved for extended vacations (49). Travelers appear to give serious consideration to the cost of various modes of transportation, the amount of time

available, the distance to be covered, and personal preferences (45). In May 1981, the cost of varied modes of travel, including enroute food and lodging, revealed travel by train to be least expensive followed by private automobile, bus, and airplane. The cost of using a rental recreation vehicle was estimated to be about double that of airplane travel (45). While it was estimated that air travel might be up slightly in 1982, it was further noted that the increase would be based on those who can afford it (39).

Even though the cost of operating an automobile is rising (28), the currently preferred mode of transportation is the private automobile or truck. Reasons given for this choice, in addition to the previously noted trend of taking shorter vacations, are: relative economy in driving, convenience, the opportunity to save money by staying with relatives or friends, and the inconvenience and vacillating cost of commercial travel (14)(47)(67)(73)(76)(79). The 1982 projected increase in travel by private automobile and truck (39) was particularly important for this study, which compared subjects' mode of transportation with those of a decade ago. According to the 1972 Census data, 85% of trips were by private automobile or truck, 12% by air, 2% by bus and 5% by train (10:271).

Also of concern to the study was comparing subjects' travel distance with those of national recreational travel. The literature revealed that 60% of Americans stay within a

300 mile radius for weekend and short vacation travel and that 85% of travel beyond 300 miles occurs only during planned vacations (42). Theme parks typically concentrate on attracting both patrons from within their region and tourists (10: 231-232). Since this study was conducted during a recognized short vacation period--i.e. Easter Week, it afforded the opportunity to compare the extent to which subjects traveled above and below 300 miles with national travel distances. Of further help for assessing the 1982 Easter Week travel distances, was 1981 summer participant data provided by the two study theme parks. Marriott's provided data in six distance parameters, by percentages. The 1981 participants traveling 300 miles or more represented 18.56% of the total. Other percentages and distances were: 49.57%, 50 miles or less; 4.26%, 51 to 100 miles; 20.31%, 101 to 150 miles; and 2.57%, 201 to 300 miles (58). The Marine World data were reported in only three categories of distances, as follows: 21%, more than 300 miles; 65%, 50 miles or less; and, 14%, 51 to 300 miles (23).

The nation-wide decrease in theme park attendance has been blamed on inflation, recession, and high interest rates (51). Although leisure expenses are among the fastest growing industries in the U.S. economy (53), many experts have wondered "where will Americans get money to spend on leisure if inflation continues to erode their incomes?" (30). As early as 1977, Epperson reported that the disturbing economic picture had changed the style of recreation. Although huge

amounts of money were spent on enjoyment, such expenditures were made for activities closer to people's homes(20:81). In terms of dollars, Americans spend nearly one out of eight on leisure (49). Even though theme parks are among the favorite places for people to spend leisure time (20:122), the new video game arcades and home sets are strong competitors for leisure dollars. In 1981, players spent billions of dollars to play these video games (65). During 1981, expenditures for sporting goods reached \$8.9 billion, and were related to such activities as golf, skiing, fishing, camping, hunting and soccer (49).

Early last year (1981) the nation's bad news was noted to be inflation and recession. By October, double digit interest rates had replaced high inflation, crippling both large and small firms (70). Still another source blamed a combination of inflation and high interest rates for a gloomy 1981 Christmas, predicting that it could be many months before the "bright side of supply side economics" could be seen (8). Time's economist anticipated that the recession would continue through the spring and the summer of 1982 and that manufacturers would cut production in an attempt to sell excessive inventories (2). The 1982 year started with an already high jobless rate and a continuing decline in the economy (69). It was predicted that this year would be one of "anxious waiting and worries about job guarantees, with very little hope for pay raises" (69). Porter asserted that unemployment was the Nation's Top Headache" (46). December

1981 and January 1982 reportedly were the worst months of the recession, with a deep decline in production and higher unemployment (17).

A major cause of unemployment, according to some economists, was higher interest rates combined with recession (63). Sales for the big three automobile makers were down almost one-third in the first ten days of December 1981, from those during the same period in 1980 (70). By March of 1982, the decision had been made to close two General Motors plants in the state of California, both of which are located in the same region as the theme parks under study (32). The latter followed a trend begun in 1981, when approximately 470 U.S. companies were forced to shut down (70). While small businesses provided 56% of all jobs in 1981, many of them have been pushed to the brink of bankruptcy (70). The ways that Americans earn their living and the amount of time spent on the job have changed significantly since the late 1940's. Following the war, non-farm workers were largely involved in manufacturing. Today, these workers are split between working in production and working in wholesale and retail trades, and by 1990 it is expected that more of these people will be engaged in jobs like data processing, hotels and restaurants (36). According to Sheer, "even with recovery, many economists are convinced some industries' employment will never fully rebound" (63). The author went on to note that many manufacturers are expanding the use of

computers and robots to improve quality and labor costs, similar to the automobile and steel industries (63). Although recent Commerce Department reports estimated that business will spend 7.4% more in 1982, the amount of money actually spent in businesses will be less than last year, after accounting for inflation (22). Many businesses have been hiring people for four days and 35 hours a week rather than for the traditional five days and 40 hours a week, which both reduces cost and increases the workers' leisure time (42)(20) (14).

The unemployment rate, which was 7% in mid-summer of 1981, had reached 9% by March of 1982 (22 and 48), at the time this study was being done. Unemployment was reportedly heading towards 10%, and several authorities predicted America would have the highest unemployment since the depression of the 1930's (31)(33)(46). In March of 1982, California had a 9.4% unemployment, higher than that of the nation and the highest since the 1976 recession when 10.3% of Californians were unemployed (80). In addition to the previously noted unemployment drop-off in the automobile industry, there were declines in construction, technical, professional, and blue-collar workers (22 and 43). A number of the unemployed are unskilled workers, not suited or prepared for high skilled professions (48). Just prior to data collection for this study, it was noted that over 5,000 workers were laid off in the two California General Motor plants (32), and that unemployment was expected to be worse as spring progressed (48).

How theme parks are attempting to cope with these trends, which are beyond their control, and how they affect them as a business, are addressed in the next section. An additional external factor--demographic changes, is also included in the subsequent discussion.

Theme Park Attendance:
Internal Consideration

"After a decade of stunning growth" (35), the uneven performance of theme parks has forced operators to "re-assess marketing strategies" (35). While this was not a marketing study, the researcher hoped that the managers of the two study theme parks would find this study helpful in assessing their respective marketing strategies. Both theme parks have common goals of increasing attendance and profits (23 and 58).

It was noted earlier that leisure spending in America has been experiencing steady growth, even during periods of a depressed economy. And, several authorities were previously noted to liken today's unemployment situation with that of the Depression of the 1930's, a time when the demand for leisure opportunities increased. According to Epperson, "as the economy falls, people ...turn to recreation to fulfill their leisure hours, as they ...do when the economy is on the increase" (20:2). What is less certain, he went on to note, is the types of recreation people will demand (20:2). Given increased leisure spending even during poor economic times, the question theme park management is seeking an answer

to is: How can the drop off in attendance be reversed?

One area coming under close scrutiny is the make-up of current participant groups. Early on in the study it was noted that both Marriott's Great America and Marine World Africa U.S.A. have targeted their advertising toward family appeal. In addition, Marine World has stressed a children's educational program, while Marriott's Great America has focused on being an entertainment center (23 and 58). Interestingly, Marine World has not been successful in attracting teenagers and "does not even try" (23). On the other hand, although Marriott's does not target promotions to teenagers, they represent a large part of their repeat business (7 and 58). Also earlier noted was the fact that while theme parks have generally drawn significantly from both the domestic and foreign tourist market, the number of foreign tourists visiting theme parks has fallen off and domestic travel has undergone changes.

A factor of importance which theme parks have only recently begun to worry about, is the steadily changing demographic picture in America. Nearly all news media have been addressing the topic of an "Aging America." There is a steadily growing number of adults over 65 years of age accompanied by a trend toward increasing longevity. It is common knowledge that approximately 10% of the American population is 65 years or older. Less well known are the following predictions: (1) a 5% decline in children 5 through 9 years of age is expected by 1987 (28); (2) a 14% decrease, during

the same period, is projected in the 9 to 14 year old category (28); (3) 46% of the population will fall between 22 and 40 years of age by the middle of the 1980's (50); and (4) "by 1990, the median age will be 28-33 years old" (77). Also specifically noted, was the fact that "there is a declining teen market" (77), and the size of the family is shrinking (35). While theme parks are projecting attracting "an older, more sophisticated audience" (35), marketers do not plan to "abandon the lucrative teen group" (35); rather, they hope to provide entertainment that will have a broad age appeal (35).

There has been considerable competition for theme park attendance. During the early 1970's this was best evidenced through the proliferation of theme parks; however, such expansion came to a halt in 1977 (24). With a combination of declining theme park attendance and escalating construction costs, it has been projected that there will be very few new theme parks being opened during the next few years (18)(24) (38). One exception, with respect to opening new theme parks, has been the introduction and growth of water parks since 1980. This type of theme park costs considerably less to build than other types of theme parks and new rides can be added for as little as \$1.6 billion (57). A more likely trend will be that of expanding current operations, such as the new Epcot Center at Disney World and/or continuing to introduce new thrill rides (24). Whereas the cost for the Epcot Center was first estimated to be \$600 million and

subsequently revised to \$800 million, the cost of adding a major roller coaster type ride ranges from \$3 to \$6 million (3)(24)(56). According to one authority "people will wait in line three hours for a 30 second thrill ride" (55). The source went on to note that "in today's stress-ridden society, ...thrill-seeking is a motivator" (55). While adding a new thrill ride every year was noted to be expensive and, by itself, unlikely to "maximize return visits" (55), Marine World's great attendance increase, between 1980 and 1981, was attributed to the introduction of a complicated water slide (23). However, in light of the cost to construct thrill rides and the demographic changes occurring, Grant's 1978 prediction is likely to come true. He noted that with an older population and smaller family units there would be "a tapering off of thrill rides, and the arms race for bigger and faster roller coasters will come to a halt" (50).

Several other ideas have been tried to increase attendance, including a greater amount of repeat business. One of these is "mental rides" i.e.--rides which create an illusion of movement, through the manipulation of the visual environment (3). Still another innovation has been the introduction of portable rides. These last about 5 years and are considerably less expensive than the more permanent thrill rides (57). In addition to thrills, participants are frequently searching for escape when they go to a theme park, and, a well developed theme park can provide the outlet for this emotion e.g.--an atmosphere which allows one to go back in

time, go forward in time, or return to nature (55). According to Maddock "the park that uses the escape strategy should not have to add a new ride every year in order to add to or maintain attendance" (55). Still other ideas which have been tried are offering big name attractions, live music shows, and special midweek entertainment packages (35). The latter is directed toward attracting more adults which, according to Lee, is an important challenge in light of a decreasing number of youngsters (3). Marriott's Great America is among the theme parks attempting to draw people through such programs on weekday evenings (35). With respect to generating more income, a more recent tactic has been to expand operations into foreign markets such as Tokyo, the Middle East, and South America (28)(35)(57). A number of theme parks have also used package pricing and discounts to increase attendance; however, a number of theme parks have stopped ticket discounts, including Marriott's Great America (35 and 47).

While setting admission prices is of course an internal matter, operators must be sensitive to economic means of the potential customer. As noted by one source, "few families have either the tendency or the money to visit more than two theme parks in a year's time" (66). In 1981, admission prices at big theme parks ranged from \$10 to \$15 a day, making the cost per day for a family approximately \$75 (35). Another source indicated that increases in ticket prices have resulted in costs beginning at \$13.50 (47). The same article

indicated that there was a strong opposition to higher ticket prices throughout the leisure industry (47).

Several suggestions have been put forth to accomplish theme park objectives of increasing attendance and their profits. John Porter, of Marriott's Great America, said that: "to attract more people we would have to let the public know that there are things here that appeal to grown-ups as well as children" (47). One vice president of marketing commented that a basic principle is to determine "what makes your product unique in a market place" so that it can be properly distributed (77). Another expert supported collecting visitor data and recommended:

Once you have collected that basic profile of your visitors, over a given time you can ask yourself how the group has changed. You begin to see how demand begins to change, and then you must listen to what your market is telling you. (55)

Still other suggestions were for theme parks to expand into year-round operation, maintain the quality in park environment and service, and to be flexible in meeting market place changes (55). Marion Knott pointed out that outside factors such as demographic changes were beyond the control of the industry (77). However, Krieisman said that such changes should be a challenge to theme park marketers to be creative and add "heart-stirring" and novel attractions to increase attendance (35).

Summary

The review of resources was presented in three sections

related to theme park attendance: trends and status, external factors, and internal factors.

Major findings of the review follow:

1. Attendance at major American theme parks has been dropping, since peaking in 1979.

2. Attendance at Marriott's Great America and Marine World Africa U.S.A. showed a decline in 1979, a year earlier than the national decline; and, although they had attendance increases in 1981, a downturn was expected for 1982.

3. Decreases in theme park attendance were variously attributed to: a drop in foreign and domestic tourists, transportation costs, inflation, recession, high unemployment, and competition by other forms of recreation--e.g. video games.

4. Despite a poor economy, leisure expenditures in America continue to increase; and, although vacations are considered a necessity, Americans have changed their pattern of travel--i.e. they take more short vacations within 300 miles of home and prefer using a private automobile or truck to commercial modes of transportation.

5. While on the national level 40% of Americans venture beyond 300 miles, during weekends and short vacations, only 18.56% of Marriott's Great America 1981 summer participants and 21% of Marine World's 1981 summer participants traveled more than 300 miles.

6. Unemployment was over 9% at the time data were collected for this study, and expected to continue to rise.

7. Theme parks are faced with the challenge of meeting the needs of a changing population--i.e. a smaller youth population, higher median age, and growth in the number of older adults.

8. While thrill rides remain popular, high construction costs have slowed their proliferation, and marketers are attempting to introduce appealing but less expensive attractions to draw participants, without have to significantly increase the cost of admission.

CHAPTER THREE

Research Method and Procedures

The method of research and procedures for gathering and analyzing the data were selected for their usefulness in this type of study.

Method of Research

The descriptive-survey method, using a questionnaire instrument, was used for this study because it was deemed to be the best way of collecting the desired information for answering the study problems. According to Good and Scates:

Descriptive-survey studies are research when they create or ascertain: (1) new categories that are revealing, or of more far-reaching significance; (2) concepts that afford a more basic grasp of the factors which enter into the results or which represent results more certainly; (3) methods of detecting and identifying a factor and measuring it (quantifying it), valuable for analysis and description; (4) certain relationships (occasionally correlation or causal) that obtain, either for practical or scientific interest or value; and (5) the structure of relationships--of the mechanism relating them, why and how certain factors cause certain results. (27:557).

Procedures

In order to conduct the study, the researcher had to apply a number of procedures to guide the collection, treatment, and analysis of the data. These are presented under

the following headings: Basic Procedures, Sources of Data, Data Gathering Instrument, Data Collection, and Data Analysis.

Basic Procedures

A review of resources pertinent to the study was carried out. The review included recent and current writings from professional books, journals and other publications, business journals and indexes, national news magazines, travel publications, national and local newspapers and television reports. Other sources of data were personal interviews with management personnel at Marriott's Great America and Marine World-Africa U.S.A., the amusement parks providing the populations for the study. Based on the review of resources, the problem and subproblems were specifically defined and supported, and the scope and delimitations were determined. Subsequently, assumptions, hypotheses and definitions were put forth, and an author-number bibliography and appendix were developed.

Sources of Data

The study population was comprised of 1982 Easter Week visitors to two Northern California theme parks: Marriott's Great America, Santa Clara, California, and Marine World-Africa U.S.A., Redwood City, California. Two stratified random samples, of 300 subjects each, were drawn from visitors entering the two parks between 10:00 a.m. and 12:00 noon. To assure collection of data representative of both weekend and midweek participation, sampling was conducted on two days

at each park. Determined randomly, sampling was conducted at Marine World on Sunday, April 4 and Wednesday April 7, while sampling at Marriott's occurred on Sunday, April 11 and Thursday, April 8. The 10:00 a.m. starting time coincided with the parks' opening hour and time of greatest influx of visitors. There were 150 subjects drawn by stratified random selection on each of the four days, yielding total samples of 300 subjects each from Marine World and Marriott's. After drawing the first case randomly, on each day, every tenth visitor or visitor group was selected for the study.

Data for the study were obtained by personal administration of a closed-end questionnaire instrument. To facilitate maintaining the integrity of the samples and to expedite data analysis, different colored questionnaires were used at each park.

Data Gathering Instrument

By carefully reviewing the study problems and hypotheses to be tested, it was determined that a closed-end questionnaire would yield essential study data in the clearest and most economic manner possible. These were deemed to be important considerations, since subjects would presumably be anxious to get inside the theme parks being visited. It was believed that sample subjects would willingly and honestly complete questionnaires requiring only simple check answers. (A copy of the Questionnaire is located in the Appendix.) The

questionnaire contained seven questions. By careful design, two of the questions provided the subject data essential for determining the tenability of ten of the fourteen study hypotheses. All of the latter involved data relevant to participant travel patterns--i.e. specific distances traveled from home, and modes of transportation. The remaining hypotheses were evaluated based on data from four specific questions concerned with: (1) geographic location of subjects' home, (2) age group of the subjects, (3) traveling companions of subjects, and (4) factors influencing the subjects' visit to the theme park.

Question content was derived from the review of resources, consultations with management personnel at the theme parks under study and the researcher's thesis committee. The latter committee also guided the researcher with respect to the questionnaire format. Validity and reliability of the instrument were established by a panel of experts.

Data Collection

Because data were to be collected on four days, two at each theme park, several precautionary measures were taken. First, to assure that data from the samples at the two parks would be clearly identifiable for later analysis, blue questionnaires were administered at Marine World, and yellow questionnaires were administered at Marriott's Great America. Second, to assure proper stratified random sampling, a helper was trained to assist the researcher with the data

collection process.

Obtaining theme park management approval for carrying out the study was facilitated by including questionnaire content of interest to both parks. Based on management recommendations, sampling and administration of the questionnaires were done "outside" of the theme park entrance gates, as people waited to get inside. It was believed that cooperation of subjects would be good, as completing the questionnaire would help them pass the time while waiting in line for park admittance. In all, 600 questionnaires were administered. They were administered to sub-samples of 150 subjects on each of four days. As noted under Sources of Data, each sample of 300 was comprised of an equal number of weekend and mid-week visitors. In sampling, thirteen year olds were the youngest subjects selected; all others were adult subjects. Since the data were to be analyzed on the basis of two samples, one from Marine World and the other from Marriott's, no attempt was made to keep the week-end and mid-week sample data separate.

While data collection began at 10:00 a.m. on each day, the researcher and his assistant arrived at the park considerably earlier, in order to be well organized to conduct the study. The researcher had also prepared a few introductory remarks to make to subjects selected in the sample-- i.e. greetings and a brief explanation of the purpose of the study.

As a result of the above-noted planning, sample subjects were very cooperative and data collection went smoothly.

Data Analysis

Initially, respondent data were checked for completeness--i.e. the number of subjects in each sample that completed all or various segments of the questionnaire. Since the bulk of the analysis was dependent upon subject responses to questions two and three, a high percentage response in these areas was deemed to be important relevant to drawing study conclusions. Simple tallies and percentages were computed.

Ten null-hypotheses were established and tested by Chi Square, at the .05 level of significance. The data pertinent to the factors influencing visitation to the two parks were presented and analyzed by the rank order of responses.

Comparative data--i.e. national travel patterns and 1981 summer theme park attendance figures--were obtained from the literature and the theme park management personnel.

Statistical analysis of the data was carried out through the University of the Pacific's computer center and in consultation with the thesis chairman. Pertinent study data and test results were presented in table form to be appropriately included in the body of the study and/or appendixes.

Subsequent to analysis, the findings were summarized and used as the basis for drawing conclusions to the study. Procedures which applied to the preparation and presentation of the thesis were done in accordance with the University

Graduate School "Instructions for the Preparation and Presentation of Theses and Dissertations," and Campbell and Ballou's Form and Style Manual.

Summary

The descriptive-survey method of research was supported as most appropriate for designing this study. Specific procedures governing the study were presented and discussed.

They included: the development and organization of the study, sampling, development and administration of the questionnaire instrument, and the analysis and presentation of data.

CHAPTER FOUR

Presentation and Analysis of the Data

Concern pertinent to declining attendance at American theme parks was addressed in previous chapters of the study, along with the identification of factors which the review of the literature suggested might affect participation in this form of commercial recreation. Sound decision-making relevant to what can be done to reverse the declining theme park attendance additionally required accurate knowledge about the current status of participation. The primary focus of this research study was directed toward gaining an understanding about the "travel patterns" of participants at two major theme parks in California--Marriott's Great America and Marine World Africa U.S.A.

The study was conducted during the 1982 Easter Week to encompass a generally recognized vacation period. After identifying and quantifying the elements of participant travel patterns for each theme park (distance traveled and mode of transportation), they were compared with one another and with national travel patterns. For the benefit of the individual theme parks, comparisons were also made of the distances traveled by subjects in this 1982 Easter Week study and those of participants during the summer of 1981.

The data were obtained from a random stratified sample totaling 600 participants, aged 13 and over. Half of the sampling was carried out at Marriott's Great America and half at Marine World Africa U.S.A. All of the subjects selected for the sample responded to the researcher's request for information; however, some subjects did not provide data for all seven questions on the questionnaire.

Overview of the Data

The seven part questionnaire allowed for collection of data about subjects as follows: (1) geographic location of home, (2) number of miles from home to the theme park, (3) primary mode of transportation, (4) age group, (5) number of people in travel party, (6) companion group, and (7) factors influencing their participation.

Since the focus of the study was on the travel patterns of subjects, the key data for the study consisted of responses to questions relating to participant travel distance and mode of transportation (#2 and #3). The analysis of five out of ten null-hypotheses was based on subject data in both of these areas. Of the total 600 questionnaires, 293 from Marriott's Great America and 298 from Marine World Africa U.S.A. provided sufficient data. For additional analysis all subject responses were utilized. (See Table 3.)

The Analysis of the Data

In order to answer the several study problems and

Table 3

Summary of Overall Questionnaire Responses
by Theme Park Respondent Groups

Subject Group	Questionnaire Categories						
	Place of Residence	Travel Distance	Mode of Transportation	Age Group	Group Size	Travel Companions	Influence
Marriott's (N=300)	296	297	296	291	292	300	300
Marine World (N=300)	300	299	299	278	290	300	300
Total	596	596	595	569	592	600	600

sub-problems, the following ten null-hypotheses were tested by Chi Square at the .05 level of significance.

Ho₁. There will be no significant difference between Marriott's and Marine World subjects' travel within or beyond 300 miles.

Ho₂. There will be no significant difference between Marriott's and Marine World subjects' travel within, above, and below a 51-300 mile radius.

Ho₃. There will be no significant difference between the combined sample's travel within and beyond 300 miles and the national percentages for these distances.

Ho₄. There will be no significant difference between the modes of transportation used by subjects from Marriott's and those from Marine World.

Ho₅. There will be no significant difference between the combined sample's modes of transportation and those used nationally.

Ho₆. There will be no significant difference between the distances Marriott's subjects traveled and those of visitors to the park during the summer of 1981.

Ho₇. There will be no significant difference between the distances Marine World subjects traveled and those of visitors to the park during the summer of 1981.

Ho₈. There will be no significant difference between the geographic home locality of subjects from Marriott's and those from Marine World.

H_{09} . There will be no significant difference between the age groups of subjects from Marriott's and those from Marine World.

H_{010} . There will be no significant difference between the companion groups accompanying subjects from Marriott's and those from Marine World.

The results of the test for the significance of difference between Marriott's Great America and Marine World Africa U.S.A. subject travel within or beyond 300 miles (H_{01}), is located in Table 4. The obtained 27.35 Chi Square value not only exceeded the 3.84 required value with one degree of freedom, it also exceeded values required at the .01 (6.64) and .001 (10.83) levels of significance. The first null-hypothesis was rejected.

The second null-hypothesis, concerned with the significance of difference between Marriott's Great America and Marine World subject travel within, above, and below a 51-300 radius, was also rejected. The obtained Chi Square value of 45.38 not only exceeded the required table value of 5.99 with two degrees of freedom, it also exceeded the values needed at .01 (9.21) and .001 (13.82) levels of significance. The test results are located in Table 5.

The third null-hypothesis was concerned with the significance of difference between the combined sample group's travel within and beyond 300 miles and the national percentage for these distances. The Chi Square value obtained from the analysis of data was 155.26, a value much greater

Table 4

Difference Between Marriott's and Marine World
Subjects Travel in Two Distance Parameters,
Tested by Chi Square

	300 miles or less	More than 300 miles	Totals
Marriott's Great America (N=293)	272 (249.37)	21 (43.63)	293
Marine World Africa U.S.A. (N=298)	<u>231</u> (253.63)	<u>67</u> (44.37)	<u>298</u>
Totals	503	88	591

$\chi^2 = 27.35$ Null-hypothesis rejected at the .05 level of significance.

Table 5

Difference Between Marriott's and Marine World
Subjects Travel in Three Distance Parameters,
Tested by Chi Square

	50 miles or less	51 - 300 miles	more than 300 miles	Total
Marriott's (N=293)	98 (111.55)	174 (137.82)	21 (43.63)	293
Marine World (N=298)	<u>127</u> (113.45)	<u>104</u> (140.18)	<u>67</u> (44.37)	<u>298</u>
Total	225	278	88	591

$\chi^2 = 45.38$ Null-hypothesis rejected at the .05 level of significance.

than the required 3.84 table value with one degree of freedom at .05. As may be seen in Table 6, the obtained value also exceeded the 6.64 and 10.83 values required at the .01 and .001 levels of significance. It was also noted that 85.1% of subjects stayed within 300 miles, compared with 60% at the national level. Only 14.9% of the subjects traveled beyond 300 miles, whereas nationally it was 40%. Again, the null-hypothesis was rejected.

The results of the test for significance of difference between modes of transportation used by subjects from Marriott's and those from Marine World are presented in Table 7. The obtained 19.42 Chi Square value exceeded the 7.82 table value with three degrees of freedom at .05. It also exceeded the .01 value of 11.34 and the .001 value of 16.27. As a result, the fourth null-hypothesis was rejected.

In the test of difference between subjects' modes of transportation and national percentages, a significant difference was revealed. Not only did the computed 93.32 Chi Square value exceed the table value of 7.82 with three degrees of freedom, it also exceeded the .01 value of 11.34 and .001 value of 16.27. Analyzing the data in Table 8, it was noted that the 87.6% of subjects travel by car was similar to the 85% national figure of 1972. Only 7.28% of subjects traveled by plane, 55% by bus, and 4.57% by other means of transportation. Nationally, 12% traveled by plane, 2% by bus, and 1% by other modes of transportation. The fifth null-hypothesis was rejected.

Table 6

Difference Between Sample Subjects. and
National Travel in Two Distance
Parameters, Tested by
Chi Square

300 miles or less (national = 60%)	more than 300 miles (national = 40%)	Total
503 (354.6)	88 (236.4)	591

$\chi^2 = 155.26$ Null-hypothesis rejected at the .05 level of significance.

Table 7

Difference Between Marriott's and Marine World
 Subjects Mode of Transportation, Tested
 By Chi Square

	Private Car/ Truck	Plane	Recreation Vehicle (RV)	Other	Total
Marriott's (N=293)	268 (256.81)	10 (21.32)	11 (7.44)	4 (7.44)	293
Marine World (N=298)	<u>250</u> (261.19)	<u>33</u> (21.68)	<u>4</u> (7.56)	<u>11</u> (7.56)	<u>298</u>
Total	518	43	15	15	591

$\chi^2 = 19.42$ Null-hypothesis rejected at the .05 level of significance.

Table 8

Differences Between Sample Subjects Mode of Transportation and Those for the Nation in 1972, Tested by Chi Square

Private Auto/ Truck (National = 85%)	Plane (National = 12%)	Bus (National = 2%)	Other (National = 1%)	Total
518 (502.35)	43 (70.92)	3 (11.82)	27 (5.91)	591

$\chi^2 = 93.32$ Null-hypothesis rejected at the .05 level of significance.

The distances Marriott's subjects traveled were found to be significantly different from those of the 1981 visitors to the park, as noted in Table 9. With five degrees of freedom, the obtained 508.23 Chi Square value greatly exceeded the table values at the .05 (11.07), the .01 (15.09), and the .001 (20.52) levels of significance. Therefore, the sixth null-hypothesis was rejected.

The distances Marine World subjects traveled were found to be significantly different than those of visitors to the park during the summer of 1981. The Chi Square table value required with two degrees of freedom at .05 was 5.99. The seventh null-hypothesis was rejected, since the 115.18 computed value of Chi Square exceeded the .05 value and, also, the values of .01 and .001 levels of significance. The data for this test are located in Table 10.

The geographic home localities of Marriott's and Marine World subjects were found to be significantly different, as evidenced in Table 11. The computed 17.83 Chi Square value exceeded the .05 table value of 5.99 with two degrees of freedom, as well as the values required at the .01 and the .001 levels of significance. As a result, the eighth null-hypothesis was rejected.

The ninth null-hypothesis was concerned with the difference between the age groups of Marriott's and Marine World subjects. The Chi Square test yielded a 54.84 Chi Square value which exceeded the required .05 level of significance table value of 9.49 with four degrees of freedom. The obtained

Table 9

Difference Between Marriott's Participant Travel in
Six Distance Parameters During the 1982
Easter Week and the Summer of 1981,
Tested by Chi Square

50 miles or less (S'81 = 49.57%)	51 - 100 miles (S'81 = 4.26%)	101 - 150 miles (S'81 = 20.31%)	151 - 200 miles (S'81 = 4.73%)	201 - 300 miles (S'81 = 2.57%)	more than 300 miles (S'81 = 18.56%)	Total
100 (147.22)	89 (12.65)	51 (60.32)	19 (14.05)	16 (7.63)	22 (55.12)	297

$\chi^2 = 508.23$ Null-hypothesis rejected at the .05 level of significance.

Table 10

Difference Between Marine World Participant Travel
in Three Distance Parameters During the
1982 Easter Week and the Summer
of 1981, Tested by Chi Square

50 miles or less (S'81 = 65%)	51-300 miles (S '81 = 14%)	more than 300 miles (S '81 = 21%)	Total
128 (194.35)	104 (41.86)	67 (62.79)	299

$\chi^2 = 115.18$ Null-hypothesis rejected at the .05 level of significance.

Table 11

Differences Between Marriott's and Marine World
 Subjects Geographic Home Locality, Tested
 By Chi Square

	California	Out-of-State	Foreign	Total
Marriott's	266 (246.83)	16 (26.82)	14 (22.35)	296
Marine World	<u>231</u> (250.17)	<u>38</u> (27.18)	<u>31</u> (22.65)	<u>300</u>
Totals	497	54	45	596

$\chi^2 = 17.83$ Null-hypothesis rejected at the .05 level of significance

value also exceeded the .01 (13.28) value and the .001 (18.46) value. The data for this test are located in Table 12. As a result, the ninth null-hypothesis was rejected.

Data for the last null-hypothesis are located in Table 13. The test of difference between Companion Groups accompanying subjects to Marriott's and to Marine World resulted in a significant Chi Square value of 54.13. The table value required at .05 level of significance with three degrees of freedom was 7.82. The obtained value also exceeded the .01 and the .001 significance level values. As a result, the tenth null-hypothesis was rejected.

In addition to analyzing data pertinent to the ten null-hypotheses, the researcher compiled rank lists of factors which subjects reported most influenced their visit to the two theme parks. Of the eleven influencing factors, subjects from both groups ranked T.V. advertising, friends, and family among the top three reasons for their attendance. The specific rank order of these items for subjects from Marriott's was T.V. advertising, friends, and family. The Marine World subjects ranked family as most important, followed by T.V. advertising and friends. A complete list of factors and rank order of responses by respondent groups is presented in Table 14, located in the Appendix.

Study Findings

The findings resulting from the analysis of data are as follows:

Table 12

Difference Between Marriott's and Marine World
Subjects Ages in Five Age Group Parameters,
Tested by Chi Square

	Under 21	21 - 35	36 - 45	46 - 55	over 55	Total
Marriott's (N = 291)	92 (60.35)	136 (145.76)	47 (55.74)	14 (18.41)	2 (10.74)	291
Marine World (N = 278)	<u>26</u> (57.65)	<u>149</u> (139.24)	<u>62</u> (53.26)	<u>22</u> (17.59)	<u>19</u> (10.26)	<u>278</u>
Totals	118	285	109	36	21	569

$\chi^2 = 54.84$ Null-hypothesis rejected at the .05 level of significance

Table 13

Difference Between Marriott's and Marine World
Subjects Travel Companions, Tested
By Chi Square

	Family	Friends	alone, tour, other	comb. of family and friends	Total
Marriott's (N = 300)	137 (164)	137 (96)	6 (7.5)	20 (32.5)	300
Marine World (N = 300)	<u>191</u> (164)	<u>55</u> (96)	<u>9</u> (7.5)	<u>45</u> (32.5)	<u>300</u>
Totals	328	192	15	65	600

$\chi^2 = 54.13$ Null-hypothesis rejected at the .05 level of significance

1. Marine World subjects traveled 300 miles or more significantly more often than Marriott's subjects.

2. Marriott's subjects traveled between 50 and 300 miles significantly more frequently than Marine World subjects.

3. Marine World subjects traveled 50 miles or less significantly more often than Marriott's subjects.

4. Study subjects traveled significantly more often within 300 miles and significantly less often beyond 300 miles than the national travel percentage in these parameters.

5. The modes of transportation used by the sub-samples differed significantly. Specifically, Marriott's subjects more often used private autos/trucks and recreation vehicles, while Marine World subjects made more frequent use of planes and other forms of transportation (e.g.--bus, train, rental car).

6. When subjects' modes of transportation were compared with those for the nation in 1972, it was revealed that subject travel by private car or truck was similar, while travel by recreation vehicles was significantly greater, and travel by plane and bus was frequently less than the national percentages of these forms of transportation.

7. A comparison of the travel distance of Marriott's subjects with those for the summer of 1981 revealed that the study subjects traveled significantly more often between 51 to 100 miles, 151 to 200 miles, and 201 to 300 miles than the 1981 participants. And, they traveled significantly less

than the 1981 participants between 101 and 150 miles and beyond 300 miles.

8. The comparison of travel distances of Marine World subjects with those for the summer of 1981 revealed that 1982 subjects traveled significantly more often between 51 to 300 miles and significantly less within 50 miles than did participants in 1981.

9. The geographic home locality of Marriott's and Marine World subjects differed significantly. Specifically, there were more Marine World subjects from out-of-state and foreign countries and more Marriott's subjects from within California.

10. The comparison of subjects' age groups revealed the following significant differences: the number of Marine World subjects in the age group of 21 years and over was significantly greater than for Marriott's; and, Marriott's had significantly more subjects under 21 years of age than Marine World.

11. Companion groups of subjects were found to vary significantly. Marriott's subjects were significantly more often accompanied by friends, while Marine World subjects were significantly more often accompanied by family members, or a group of family members and friends.

12. The three factors most influential in subjects' visits to the study theme parks were T.V. advertising, friends and family. Important to a lesser degree were previous visits and theme park coupons.

Summary

Prior to presenting the study data, the questionnaire content was described as was the level of sample participation. Overall subject responses were presented in a table.

The ten null-hypotheses presented were all tested by Chi Square, at the .05 level of significance. The results of these tests were presented in individual tables, to enhance the discussion concerning data analysis. Subsequently, the study findings were summarized.

CHAPTER FIVE

Summary, Conclusions, and Recommendations

This final chapter of the report contains a summary of the study, conclusions based on the analysis of data, and recommendations.

Summary

This descriptive study was undertaken to identify and compare the participant travel patterns of 1982 Easter Week visitors to two California theme parks with one another, and with national travel patterns. The theme parks in the study were Marriott's Great America, in Santa Clara, and Marine World Africa U.S.A., in Redwood City. Comparisons were also made between the distances study subjects traveled to each of the parks, and those participants traveled during the summer of 1981. Additional subject data gathered and analyzed included: geographic residences, age groups, size of travel parties, companion groups, and factors most influencing their park visitations.

Findings for the investigation were obtained from a broad review of the resources and from a population sample survey. The population under study consisted of Easter Week

visitors to the two theme parks. The study was delimited to 600 subjects. Of the total, 300 were randomly drawn from each theme park at the rate of 150 each, on randomly selected mid-week and weekend days.

The study was based on the following general assumptions: (1) a closed-end questionnaire would elicit honest and essential participant data; (2) stratified random sampling would yield representative participant data; and, (3) sampling done on both weekends and mid-week would include local and out-of-area vacation subjects. It was hypothesized that analysis of the data would reveal the following significant differences between subjects from Marine World Africa U.S.A., and subjects from Marriott's Great America: (1) Marine World subjects would travel 300 plus miles more than Marriott's subjects and, conversely, Marriott's subjects would evidence more travel of less than 300 miles; (2) Marriott's subjects would travel significantly more within 51 to 300 miles and use private automobile or truck more, and air travel less, than Marine World subjects; (3) Marine World subjects would be older, more often travel with family members, and include more out-of-state and foreign visitors than Marriott's; and, (4) T.V. advertisement, family, and friends would be the most influential factors cited by all subjects for their theme park visitations. It was further hypothesized that when the results of the sample, as a whole, were analyzed and compared with national travel data, significant differences would include: (1) greater subject travel within 300 miles and less

beyond 300 miles; and, (2) more subject travel by private automobile or truck and less by air. With respect to comparison of subjects' travel distances with those at each park during the previous summer, it was hypothesized that analysis of data would yield significant differences as follows: (1) Marriott's subjects would travel more within 51 to 100 miles, and less both within 50 miles and over 300 miles; (2) Marine World subjects would travel more within 51 to 300 miles and less within 50 miles; and, (3) that subjects from both parks would travel more often between 51 to 300 miles and less often within 50 miles, than the 1981 visitors. Also put forth were definitions for key study terms.

The study was prompted by a concern for steadily declining attendance at major American theme parks. A broad review of resources was undertaken to shed light on the status of theme park attendance and the potential external and internal factors affecting it.

The review gave support to an overall decline in major theme park attendance, beginning in 1980. The two study theme parks, after suffering declines in 1979 and 1980, had an upward attendance reversal in 1981. However, they expected a second decline in 1982. These theme park attendance declines were noted to be primarily the result of a slow down in tourism and the overall poor state of the economy, despite the fact that the largest item of leisure expenditure is noted to be for tourist travel and vacations. Tourism was noted to be generally sluggish, with a decrease in foreign visitors

attributed to the strength of the dollar. Travel expenses were noted to have increased more rapidly in 1981 than any other industry. The cost of commercial air travel was noted to be high. Other than high cost, decreases in air travel were blamed on the air controllers strike, deregulation, and travel inconvenience. Although the supply and cost of gasoline has experienced some recent ups and downs, the private automobile and truck were noted to be increasingly utilized for American travel. The 1972 census data relevant to modes of transportation were important for this study. They revealed the following percentages, by modes of transportation: 85% by private automobile and truck; 12% by air; 2% by bus; and, .5% by train. Currently, train travel was noted to be least expensive, followed by use of the private automobile and truck. Authorities agreed that Americans would continue to take vacations and spend money for leisure activities, regardless of the state of the economy. It was noted, however, that travel patterns were changing. Americans are taking, and will continue to take, more short duration and nearer to home vacations, using the automobile or truck as the preferred mode of transportation. Short trips were noted to be those within 300 miles of home, the maximum distance 60% of Americans travel during weekends and short vacations.

Inflation, recession, and high interest rates were noted to not only be factors in theme park attendance but,

also, factors in both slowing the rise of new theme parks and the introduction of new thrill rides. In addition to generally tight money, unemployment was noted to be a continuing factor in the attendance decline. National unemployment had risen from 7% in 1981 to 9% by March of 1982, while in California the rate had risen to 9.4%.

In addition to coping with sluggish tourism and a depressed economy, as they relate to business costs and attendance, theme park marketers have been confronted with demographic changes in America. Specifically, the population is continuing to age--i.e. the population of older adults is increasing, the median age is shifting upward, and the number of children and youth is declining. The asserted result is an older theme park market. Target markets which the two theme parks have concentrated on are: (1) the family, at both areas; and, (2) children, at Marine World. A large segment of the participants at Marriott's, however, has been teenagers; few teenagers go to Marine World and they do not target this population group. Also, Marriott's Great America promotes "fun," while Marine World promotes "education and family."

Marketing ideas introduced and/or suggested to promote attendance by the changing market, while both observing economy in construction and holding down rises in ticket prices, were: (1) portable, 5 year life-expectancy rides; (2) "mental rides"; (3) enhancement of park themes; (4) maintaining a

quality environment; (5) live music shows and/or big name attractions; (6) mid-week entertainment packages geared to adult audiences; (7) emphasizing uniqueness of parks; (8) expanding into year-round operation; and, (9) being creative with new attractions.

The closed-end questionnaire instrument, utilized to gather the data, was based on the review of resources. It was deemed to be valid and reliable by the researcher's thesis committee. Primary content areas were participant travel distances, their modes of transportation, and their geographic home localities. Other content areas were listed in the opening paragraph of this summary. A copy of the questionnaire is located in the Appendix of the study. Stratified random sampling was done outside the entrance gates of the two theme parks, between the hours of 10 a.m. and 12 noon. By random selection, sampling was carried out at Marriott's Great America on Thursday, April 8 and Sunday, April 11. At Marine World Africa U.S.A., sampling was conducted on Sunday, April 4 and Wednesday, April 7. The total sample consisted of 600 subjects, 300 from each of the parks. Of the total, 150 questionnaires were administered on each of the four specified days. To facilitate analysis of data from the theme park sub-samples, blue questionnaires were administered to Marine World subjects, and yellow ones were administered to Marriott's subjects. In sampling, only visitors 13 years or older were included.

Following data collection, all questionnaires were checked for completeness and correctness--i.e. no more than one answer per question. Simple tallies and percentages, where relevant, were computed. Of the ten null-hypotheses tested, seven were dependent on complete answers to items 2 and 3 on the questionnaire--i.e. distances visitors traveled and their modes of transportation. Data for comparative analysis in these areas were drawn from the review of resources. Of the total sample, 591 questionnaires provided complete data for these two questions--293 from Marriott's Great America and 298 from Marine World Africa U.S.A. All 600 questionnaires were usable for analysis of the remaining three null-hypotheses. All ten null-hypotheses were tested by Chi Square at the .05 level of significance. Analysis of data revealed all ten null-hypotheses to be significant and, as a result, all ten were rejected.

Study findings relevant to significant differences between the sub-samples were that: (1) Marine World subjects traveled both significantly more often in excess of 300 miles and within 50 miles, than subjects from Marriott's Great America; (2) Marriott's Great America visitors traveled significantly more often between 50 and 300 miles, than Marine World Africa U.S.A. visitors; (3) Marriott's Great America subjects made significantly greater use of the private automobile and truck and significantly less use of plane travel, than Marine World subjects; (4) there were significantly more out-of-state and foreign visitors at Marine World Africa

U.S.A. and significantly more visitors from California at Marriott's Great America; (5) at Marine World Africa U.S.A. there were significantly more subjects 21 years of age and over and significantly less subjects under 21 years of age, than at Marriott's Great America; (6) Marriott's Great America subjects traveled significantly more often with friends, and Marine World subjects traveled significantly more often with family members and/or friends; (7) both participant groups were most influenced to attend the theme parks by T.V. advertisement, friends, and family. When the sub-sample data were compared with the 1981 summer visitor data, it was revealed that: (1) Marriott's subjects traveled significantly more often between 51 to 100 miles, 151 to 200 miles, and between 201 to 300 miles, than the 1981 park visitors; (2) subjects from Marriott's traveled significantly less often between 101 to 150 miles and beyond 300 miles, than the 1981 park visitors; and, (3) Marine World subjects traveled significantly more often between 51 to 300 miles and significantly less often within 50 miles, than the 1981 park visitors. The comparison of the sample, as a whole, with national travel pattern data, revealed that: (1) study subjects traveled significantly more often within 300 miles and significantly less often beyond 300 miles; and (2) they traveled significantly more often by private automobile, truck and recreation vehicle and significantly less often by plane and bus.

Conclusions

As a result of the study, it was concluded:

1. According to the literature:
 - a. Declining American theme park attendance is attributable to a combination of changes within the tourism market, the overall state of the economy, and competition for leisure dollars.
 - b. The modes of transportation utilized for leisure travel have changed over the last ten years-- i.e. air travel has decreased while travel by private automobiles, trucks, and recreation vehicles has increased.
 - c. There is a trend of Americans substituting a number of short duration trips and vacations within 300 miles of their homes, for more distance and long duration trips.
 - d. America is an "aging nation," with a steadily declining youth population and an increasing older population and median age.
 - e. Theme park marketers, while attempting to control their operational costs, need to provide creative and quality services which are attractive to changing American age groups, at a price they can afford.
2. The composition of visitors to the two study theme parks and their travel patterns are different.

Specifically:

- a. Marine World Africa U.S.A., promoted as an "educational-family park," attracts a preponderant number of adult visitors who are accompanied by family members and are frequently from out-of-state or country.
 - b. The preponderance of visitors to Marriott's Great America, promoted as a "fun park," are from California, under 35 years of age and accompanied by friends.
 - c. The distances visitors to Marine World travel rank from less than 50 miles to over 300 miles, with long distance travelers preferring air travel and short distance travelers preferring to use a private automobile or truck.
 - d. Visitors to Marriott's Great America most often travel between 51 to 300 miles, using private automobiles or trucks.
3. The distances visitors travel from their homes to the two study theme parks have changed, since the summer of 1981. Specifically:
- a. 1982 visitors to Marriott's Great America more often traveled in excess of 50 miles but less than 300 miles.
 - b. 1982 visitors to Marine World traveled more often in all distance categories beyond 50 miles.

4. The travel patterns of visitors to the two study parks are different than those for the nation.
Specifically:
 - a. Eighty-five percent of visitors restrict their travel to 300 miles or less, compared to sixty percent for the nation.
 - b. Visitors to the study theme parks travel considerably less often by plane and bus than 1972 travelers, and considerably more often by private automobile, truck, and recreation vehicles.
5. All fourteen study hypotheses appeared to be supported and tenable.

Recommendations

Having demonstrated the tenability of the study hypotheses, the investigator proposed the following recommendations for further study:

1. That consideration be given to broadening the demographic area in the questionnaire, to include a precise count, by age group, of all persons accompanying sample subjects.
2. That the study be repeated at the same and similar theme parks, utilizing the recently released 1982 census data.
3. That consideration be given to conducting a similar study, with an added dimension relevant to marketing.

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APPENDIX

THEME PARK PATRON QUESTIONNAIRE

Easter Week 1982

PLEASE COMPLETE ALL QUESTIONS

1. Do you live in the United States?

If YES, in what state _____

If NO, in what country _____

2. Which of the following best describes the distance of this park from your home? (Check one)

_____ 50 miles

_____ 151 to 200 miles

_____ 51 to 100 miles

_____ 201 to 300 miles

_____ 101 to 150 miles

_____ more than 300 miles

3. What form of transportation did you use to get here from your home?

_____ Private auto/truck

_____ Recreation Vehicle (RV)

_____ Airplane

_____ Other: please explain

_____ Bus

_____ Train

4. Which of the following groups includes your age?

_____ 13 to 20 years

_____ 46 to 55 years

_____ 21 to 35 years

_____ 56 to 65 years

_____ 36 to 45 years

_____ over 65 years

5. How many people in your party, counting yourself? _____

6. Who came to the park with you?

_____ No one

_____ Friends

_____ Family

_____ Tour Group

7. Who or what influenced you to come to this amusement park?

_____ TV advertising

_____ Discount coupons

_____ Radio advertising

_____ Family member(s)

_____ Newspaper advertising

_____ Friends

_____ Promotional flier

_____ Other: please explain

Table 14

Ranked Order of Factors Influencing Subjects
 Visitation to Marriott's Great America and
 Marine World Africa U.S.A. Ranked by
 Frequency of Response.

Marriott's (N = 300)		Marine World (N = 300)	
T.V. Advertising	71	Family	70
Friends	70	T.V. Advertising	63
Family	42	Friends	53
T.V. and Other	27	Other	29
Previous Visit	22	Previous Visit	18
Other	20	T.V. and Other	18
Coupons	19	Coupons and other	17
Coupons and other	13	Coupons	12
Radio Advertising	11	Family and Friends	8
Family and Friends	3	Newspaper/Flier	7
Newspaper/Flier	2	Radio Advertising	5