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US Based Theme Parks and the Visitor Experience

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Abstract

There are hundreds of theme and amusements parks located throughout the United States. There are hundreds of choices out there for the consumer to experience. For a theme park to be the number one choice amongst consumers, theme parks must establish themselves as the best choice amongst all the parks. The best in visitor participation, education, esthetic appeal, food and beverage, diversity of rides, low wait times, virtual lines, affordability, and a host of others. Utilizing secondary research, this literature review aims to analyze, compare, and contrast some previous studies that focused on the visitor experience.

Keywords: Theme Parks, Brand Loyalty, Experience

Contents

Introduction

What defines a theme park and the elements that make up a theme park varies from scholar to scholar, researcher to researcher and other associations. Lickorish & Jefferson (1988) point out the main purpose of a theme park is to create the experience of another world and tell a story that emphasizes a specific attraction at a destination. Themed Entertainment Association defines a theme park as a place where various features such as attractions, rides, events, shows, structures, landscape, restaurants, and retail stores are presented around a specific theme(s) to offer a unique atmosphere and experience. Liang & Li (2021) define a theme park as a dedicated space featuring five main characteristics: thematic identity, closed space with controlled access, hybrid consumption, performance labor, and merchandising.

Visitor experiences differentiate by person and park. No visitor is going to have the same experience at the same park or a different park. Understanding these influential experience factors is vital to generating repeat business. Theme parks are in the business of selling an experience. This experience is not a tangible good, it is not something you can physically hold or take home. The theme park itself is a tangible item, but the sensations, memories, visual stimuli, and live performances created by the park are just that, an experience. It is something that lives on in your mind. Once you exit the theme park, the experience is over. All that remains is the memory.

The operation of the entire theme park should run seamlessly like a well-oiled machine, so the visitor does not experience overwhelming negative experiences. Mental discomfort, prolonged wait times, broken down rides, negative character interactions, over the top merchandise pricing or high price park entry fees. Those negative factors could lead to a not so memorable experience, and the visitor not wanting to return. Scholars and researchers have been studying customer experience as it relates to theme parks for years, utilizing all types of studies, and comparing all sorts of data points.

The theme park industry is a very competitive industry and theme parks are continuously updating attractions in hopes of gaining customer loyalty and improving the customer experience. There are over 400 theme parks in the United States. The five most visited theme parks in the United States are owned and operated by Disney, NBC Universal, Sea World Entertainment, Six Flags Inc., and Cedar Fair LP. Of the big five controlling market share, ranked from highest to lowest, Disney controls 53.2%, NBC Universal with 18.9%, Sea World Entertainment with 8.7%, Six Flags Inc. with 7.9%, and Cedar Fair LP with 5.7%. The remaining 5.6% is made up of other parks (Brocker, 2021).

Literature Review

The studies contained in this literature review are of similar content. The studies include some of the same measurable data points but were gathered and analyzed through different formats.

Overview of similar studies

Pan et al. (2018) conducted a primary research study exploring six influencing factors on U.S. theme park visitors' choices. Based on previous studies reviewed, the authors deemed the type of theme park, price ($ per day), distance (from accommodation), child-friendliness, visit duration, and online reviews (i.e., Trip Advisor), as the six major attributes that influence a theme park customers' theme park selection and revisit intention. A choice-based conjoint (CBC) analysis was conducted, and 380 survey responses were collected and analyzed from visitors to a U.S. Theme Park within the last twelve months. Time of year and how the study was administered and was not mentioned.

Lee et al. (2020) conducted a primary research study utilizing a self-administered survey broken into four sections. Experience, satisfaction, revisit intention, and visitor profile/demographics. The study was designed to research what types of experiences influence a visitors' satisfaction with a particular theme park and the visitors' possible intention on returning. The study adopted the Experience Economy Model, originally developed by Pine and Gilmore (1999). The study was administered online and targeted visitors over the age of 18 who visited Disney World in Florida or Disneyland in California within the past 12 months. 530 completed surveys were accepted and analyzed. Time of year the study was conducted, was not mentioned.

Godovykh et al. (2019) studied factors using primary research that contribute to the amount of pleasure experienced at a theme park based on time allocation, perceived value, queuing quality, satisfaction, and loyalty. The survey was designed using Qualtrics Software, a seven-point Likert scale ranging from 1= strongly disagree or 7= strongly agree for the range of likability, and Amazon's Mechanical Turk was used to collect the data. 148 surveys deemed acceptable were collected and analyzed. The study focused on visitors in the who visit Disney World Orlando, Universal Orlando, or Sea World Orlando in the past six months. Time of year the survey was administered was not mentioned.

All three studies collected sociodemographic data to include at the minimum: gender, marital status, income, age, and education.

Methodology

Utilizing secondary research, this working paper aims to conduct a subjective analysis of three comparative studies of theme park visitors experience and possible influential factors that may generate repeat business. By comparing similar and opposing factors in the studies, one should be able to deduce a plausible outcome of what leads to a positive experience for a visitor and their possible intention to revisit the same theme park.

Findings

After completing a subjective analysis of the literature, I will provide an overview of the sociodemographic data, what may constitute brand loyalty, the visitor experience, and possible limitations, and formulate a conclusion based on my analysis.

Sociodemographic

Godovykh et al. (2019) surveyed visitors to Walt Disney World, Universal Studios and Sea World in Orlando, Florida within the past six months. Out 148 surveys the average age of visitors was determined at 32 years old, 57% of the visitors were female, 58% of all visitors had a college education, the majority having an annual income of less than $50,000, and 70% of those surveyed being White/Caucasians.

Pan et al. (2018) surveyed 380 visitors who visited any U.S. theme park within the last 12 months. The average age range was 25-34 years at 44%. The majority, 46% of the respondents reported being single, while 45% reported being married. 25% reported having some college. 23% reported and annual income of $50,000-$74,999. 72% reported being White/Caucasians.

Lee et al. (2020) surveyed 530 visitors who had visited Disney World in Florida or Disneyland in California within the last 12 months. Gender of the visitor almost split down the middle at 48% female and 51% male. Average age range was 29-38 at 39% and average income was $60,000-$79,999 at 23%. 45% reported having a four-year college degree, 44% of visitors were single, 29% were married with children and 64% were visiting the park with family.

If you take the high end of age, low end of income, midpoint of college, and marital status and average the numbers from the three studies, the average age is 34, income $53,000, 42% have a college education and 37% are married and may or may not have children. This data possibly shows that the visitors surveyed are more established in their life and career path. They are most likely to have a steady income stream, married and some college education or higher degree. They may have disposable income set aside for the yearly theme park adventure. It would be difficult to say if these factors play any part in theme park revisit intention.

Brand Loyalty

Brand loyalty is the positive association consumers attach to a particular product or brand. Customers who exhibit brand loyalty are devoted to a product or service, which is demonstrated by their repeat purchases despite competitors' efforts to lure them away (Kopp, 2021). Some people are loyal to brand, and nothing can or will change their mind. Theme parks are looking for that brand loyalty. Disney World may find it very difficult to lure away a Universal Studios customer, or Sea World may have trouble capturing the Disney faithful. Theme parks must create an experience that suits everyone who come to visit the parks and spend the day. A common problem is you cannot please everyone all the time. If most visitors or better have pleasant experience, then the more likely they are to remain loyal to the brand.

For example, Disney continuously conducts research through surveys to ensure they are fulfilling the needs of their Guests. Disney refers to customers as guests. Disney also creates that feeling of nostalgia utilizing Disney characters and interactions with guests (Lawrence & Greene, 2020). The character to guest interaction helps to reinforce the Disney brand and customer loyalty.

Sea World attempts to capture brand loyalty with the offering of Annual Passes with enhanced benefits. The top tier annual pass includes admission to all eleven of Sea World family of parks, free parking, free guest passes and special yearly events for $471 per person (Sea World, 2022).

Visitor Experience

Lee et al. (2020) adopted an experience model to gauge visitors view of quality of the education the theme park provided. Education being quality of information provided by exhibits. Entertainment value like park activities (rides & shows), escapism, the ability for a person to forget about their life outside the park and immerse themselves into the theme park adventure. Esthetics, to include the setting of the park and the park's attention to details on the supporting theme. Satisfaction was gauged with questions resembling, was the visitor satisfied with their park experience and revisit intention? Will the visitor want to come back, was this their first experience, or never come back? Based on the results, it was determined that educational and esthetic lead directly to higher satisfaction, and the higher satisfaction and escapism lead to the highest support of revisit intention.

Pan et al. (2018) utilized a Choice-based conjoint analysis and sampled duration of theme park visit, distance from accommodation, pricing and policy, child-friendliness, and online reviews from TripAdvisor. They determined that online reviews were the most influencing factor 40%, when it came to choosing a theme park to visit.

Neither of the other studies reviewed measured the impact of online reviews. Godovykh et al. (2019) did include a question in their survey if the visitor would be willing to promote their visit on social media. The second most important factor was price 29%, and any price over $100 could be a negative factor. The type of theme park (adventure, futuristic, international, nature, fantasy, history & culture) ranked third 16% in the decision process, while child-friendliness or being able to keep younger children entertained was fourth 6% and distance to accommodation (less than 10 miles) was fifth 1%.

Godovykh et al. (2019) measured five variables to include time allocation for exhibits and rides, perceived value for money spent, queuing quality (fast pass, speed pass), satisfaction of park or park choice, and loyalty. This study had the least number of surveys (148) and focused on three Florida theme parks, Disney World, Universal Studios, and Sea World. Even though this was the smallest study, it was the most in-depth. Each variable had anywhere from three to eight questions. A Likert scale rating from 1 (worst) to 7 (best) was utilized in survey. Perceived value fees had an average of 4.02, but overall quality for the price had a rating of 5.3. Queuing quality (standing in line) had rating of 4.26, but the waiting environment had a rating of 5.16. These ratings can tell us that even though some thought the prices were high, the value received for the money was of good quality. As far as overall satisfaction variable, which carried five subcategories, the low rating was 5.41 and the high was 5.72. This can tell us that even with price for admission, cost of food, and wait times in line, the visitor was happy with their experience.

Disney World is the largest of the three parks, then Universal Studios and Sea World. The data and conclusion of the study pointed out that visitor experience was best at Sea World. Sea World is a smaller park, and the exhibits allow for a much more immersive experience. Visitors can touch and hold some of the aquatic life and keepers are in the exhibit providing educational information.

Limitations

Due to the time constraint of the course being only eight weeks, utilizing secondary research only, and conducting a purely subjective analysis, interpretation of another researchers' work can be open to mistakes and misinterpretation of the final findings.

Implications

Theme parks must consider the informational value visitor experience studies can provide. Knowing your customer and what makes them appreciate one park over another is a key business advantage. Future research studies should be conducted at different times of the year (holidays, spring break, mid-summer, etc.) to gather different data points. Studies with a larger sample group and limit the focus of the study to a singular park instead of combing two or three parks in one study.

Conclusion

Based on the reviewed literature and analyzing the studies, it could be safe to say they are many factors. However, no factor stood out more than another. Visitors of both genders, all races, all ages, married, single, married with kids or no kids, any income or education level all attended theme parks. Visitors are looking to escape the daily hum drum of life and experience something different. Looking to put the worry of life and work on the back burner for the day. Enjoy time with friends, family, kids, and possibly even learn something new along the way. Visitors may be content with just only visiting one park and never venturing to a different. Others may want to visit all the parks they can.

Once a person has decided to visit a theme park, they have accepted that the park will most likely be expensive. There will be wait times, standing in line, but those can be minimized for an extra expense (speed passes, skip the line). Accepted the fact that some of the rides won't be operational or all the exhibits open. This acceptance all but helps the experience become more enjoyable.

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