

# Fantastic research: analysing theme park visitors

How a combination of research techniques helped Universal compete against Disney in Florida; **Mark Ingwer**, Insight Research, Chicago, explains

**I**N 2006, UNIVERSAL Orlando Resorts (UOR) was facing a serious challenge. It was experiencing steadily waning gate traffic and at the same time was not considered a destination theme park by many out-of-market visitors. Vacationers were overlooking Universal Orlando Resorts in favour of attractions such as Walt Disney World's Magic Kingdom, Epcot and SeaWorld.

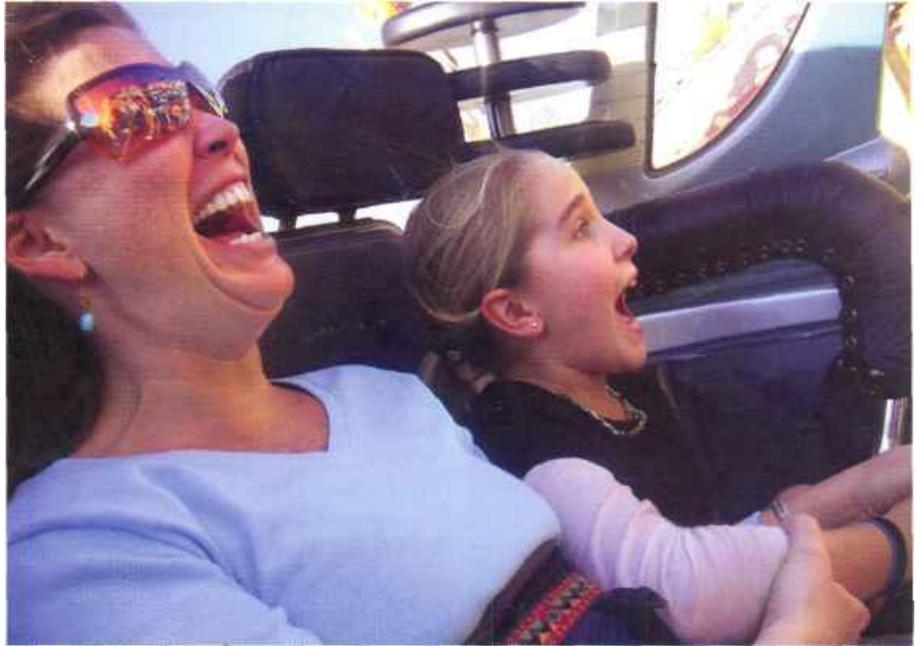
Additionally, many visitors to Orlando did not have a clear notion of what to expect at UOR. In fact, most vacationers did not realise that there was more than one theme park at Universal Studios Florida (Islands of Adventure and Universal Studios Florida). The prevailing perception was that, at Universal Studios Florida, there were attractions related to movies in some way.

The marketing team at Universal Studios Florida asked us to help them address these issues and to solidify the brand by understanding the differences between visitors' emotional experiences at Walt Disney World and Universal Studios Florida. Management hoped to use this learning both strategically and as a foundation for marketing communications better to differentiate the UOR experience from Disney. Once they identified a strong market positioning, and achieved successful differentiation, they expected gate traffic to increase and profits to rise.

## Insight's methods

Insight Research was selected because of our proprietary market research technique, psycho-ethnography, which applies techniques and theories from psychology and anthropology to the study of consumer behaviour. The combi-

**'In 2007, Universal Studios Florida earned a record \$92 million, more than twice its total the year before'**



nation of the specificity of motivational-psychological research and the observational tenets of ethnographic research can achieve an in-depth understanding of consumer needs and desires, and deliver insights that provide the basis for meaningful communication strategies.

Using a psycho-ethnographic approach, a team of researchers spent a week at Walt Disney World and Universal Studios Florida observing vacationers and conducting interviews. We were particularly interested in the factors that drive the choice of theme park when planning a vacation, as well as emotional responses to the theme parks, including how the experiences of the two parks are similar and how they differ.

A variety of research methods were used to discover the emotional experience the two parks contribute to the lives of consumers.

First, in order to gain a more complete understanding of vacationers' emotional states in various theme park scenarios, guided imagery was employed. Participants were asked to close their eyes and to re-create the thoughts and feelings connected to their theme park experiences.

Second, the researchers gave participants a list of 38 words, such as

'energised', 'pampered' and 'wow!' (see Table I), and asked them to sort them according to which theme park they fitted better. A similar exercise with pictures was also employed: participants were given a stack of pictures and asked to assign each to either Walt Disney World or Universal Studios Florida.

The pictures most often selected for Disney World were those that showed relaxing / calm settings, typical 'all-American' families, romantic couples and children playing.

By contrast, pictures associated with Universal Studios Florida were those depicting people involved in exciting, challenging activities such as white-water rafting or mountain climbing, people expressing exuberance and triumph, and images that conveyed power, the unknown, the future, 'a new path' and a different direction.

These two exercises were designed to probe vacationers' emotional responses to Universal Studios Florida and Walt Disney World.

Another projective technique used was 'laddering'. When participants repeatedly used a word, for example, 'escape', they were asked to expand on the idea by explaining what that word meant to

TABLE 1

## Word sorts

| Universal Studios Florida | Walt Disney World |
|---------------------------|-------------------|
| energised                 |                   |
| in command                |                   |
| stimulated                |                   |
| transported               |                   |
| thrilled                  | sentimental       |
| confident                 | safe              |
| awestruck                 | spellbound        |
| challenged                | pampered          |
| exhilarated               | delighted         |
| surprised                 | astonished        |
| courageous                | caring            |
| wow!                      | fulfilled         |
| triumphant                | special           |
| invincible                | romantic          |
| unleashed                 | nostalgic         |
| heroic                    | privileged        |
| inspired                  | relaxed           |
| excited                   | charmed           |
| adventurous               | elated            |
| amazed                    |                   |
| connected                 |                   |
| uneasy                    |                   |
| scared                    |                   |

them. Following this lead to its conclusion can uncover interesting insights that might otherwise have gone unnoticed or unarticulated. An example of this can be found in Figure 1.

Most interviews were held on-site at the theme parks, in order to capture participants' immediate emotional responses to their experience. We also spoke with vacationers at nearby locations, such as shopping centres and family restaurants, to capture their impressions immediately after their experience at Disney World.

### The findings

The research identified three areas that provide opportunities for Universal Studios Florida to differentiate itself from Disney World and to transform itself from a secondary vacation option to a viable Disney competitor. These three areas of difference are:

1. the emotional experience of the parks
2. life-stage and psychological needs of the vacationers
3. societal and cultural changes.

### The emotional experience of the parks

The research shows that, without question, vacationers believe that the Universal Studios Florida Experience and the Walt Disney World Experience are very different. Key points of difference include:

Walt Disney World is inherently more passive and observational; Universal Studios Florida is more active and participatory

Walt Disney World is perceived as being safe and predictable; Universal Studios Florida is perceived as thrilling and unexpected

Walt Disney World is nostalgic; Universal Studios Florida is considered more visionary

Walt Disney World is fantasy; Universal Studios Florida is 'another reality'

Walt Disney World is considered more for kids; Universal Studios Florida is for both parents and kids.

Based on these differences, we identified two potential benefits for Universal Studios Florida, which are not only different from those offered by Walt Disney World, but may be more congruent with people's expectations and desires with regard to the theme-park vacation experience for specific families:

1. Universal Studios Florida can provide vacationers with a distinct feeling of escape from everyday life and an 'ordinary' vacation
2. Universal Studios Florida may allow families to bond at a deeper, more mature level.

### Life-stage and psychological needs

One of the most prominent factors that we uncovered through our research at Universal Studios Florida and Walt Disney World was the impact of life stage on the vacationers' experience of the theme parks.

During our psycho-ethnographic process, we uncovered two distinct stages of childhood emotional and intellectual development. Of course, it follows that as children progress through these stages, the role of the parents evolves as well. The two theme parks position themselves in different ways with respect

to these stages in the lives of children and parents.

The first stage of child development is characterised by complete dependence upon the parents. The corresponding parental role is 'the caretaker'. Walt Disney World offers a sense of partnering, or even relief for parents, because its environment and ambience is safe and predictable. It is pleasing and non-threatening for children and easy for parents. Walt Disney World has the comparative advantage in this area, and, due to its solidly entrenched reputation as a park for children, it may not be worthwhile to try to compete in this arena.

The second stage of child development is one of exploration, curiosity and interaction. The child's goal is an increased sense of mastery and autonomy, and a decreased reliance on parental involvement. Although Walt Disney World can be stimulating for this age group too, especially at the younger end, Universal Studios Florida is better positioned to appeal here because it offers a greater intellectual challenge than Disney.

When children attain this higher stage, the parental role changes from that of caretaker to that of adviser and guide. As their children grow older, parents focus less on protecting them and more on encouraging their interaction with the world, self-discovery and growth. Parents have an easier time doing this in the more interactive world of Universal Studios Florida than in the more passive Walt Disney World.

Understanding the impact of life-stage on the experiences of children and adults, we proposed another avenue for differentiation for Universal Studios Florida. Walt Disney World is already a rite of passage for younger children. It is their first introduction to Americana, and parents feel it is an experience their children ought to have. We suggested that Universal Studios Florida position itself as a new rite of passage: a shared family experience for older kids and their parents. A vacation at Universal Studios Florida could be a milestone in the relationship of the whole family: the first vacation they can take together and all thoroughly enjoy.



**Mark Ingwer** is founder and president of Insight Research Associates, Chicago. mark@insightresearch.net

### Societal and cultural changes, and the 'universal experience'

There have been several recent cultural shifts that have favourably affected the Universal Studios Florida experience. Universal already had the advantage. It just needed to make the most of its natural resources:

*Technology.* Universal Studios Florida is recognised for its state-of-the-art technology, a reputation that Walt Disney World does not enjoy. As our lives are becoming increasingly accepting of and dependent on technology, Universal Studios Florida's significant advantage in this area becomes a key strength.

*Interactive learning:* perhaps because of the increasing importance of technology, the way that people learn is changing rapidly. They are demanding more say than ever before in what information they receive and how they receive it. Universal Studios Florida encourages active participation, as opposed to the passive observation characteristic of the Disney experience. Therefore, Universal is better positioned to cater to the drive for individualisation, whereas Disney offers one-size-fits-all passivity, Universal offers vacationers the opportunity to be a part of the action - whatever action they choose to be a part of, that is.

*Knowledge gap:* the knowledge gap between children and adults in the

realm of technology has been widening dramatically. Children are increasingly comfortable with technology and adults are increasingly afraid of it. Universal Studios Florida's technological upper-hand gives it an advantage over Disney for both groups. Children are drawn to technological mastery; adults are presented with it in a non-threatening, fun way that makes them feel 'with it'.

*More pressure and stress:* as people's lives become increasingly busy and stressful, the desire to escape on vacations grows\* ever stronger. In our interviews, we consistently found that Universal Studios Florida offered a deeper, more complete escape than did Walt Disney World.

*The drive for more quality time with family,* because of increased pressure and time constraints, family quality time is at a premium. Walt Disney World's family experience consists mainly of the children having fun and the parents watching their kids have fun. At Universal Studios Florida, however, parents and kids both have fun, together, in the same way. As one participant put it, 'At Disney, our kids share experiences with us. At Universal, we are sharing experiences with our kids.'

In short, we discovered that Universal Studios Florida is very well placed to differentiate itself from Walt Disney

World and to become a not-to-be-missed family vacation destination. Not only does it provide an experience that is decidedly different from that provided by Disney, but Universal Studios Florida also addresses more completely the emotional needs and desires of vacationers in all stages of life within our changing culture.

### Success

In part based on this research, Universal Studios Florida, with the help of its advertising agency, created a marketing campaign targeting the emotional needs of its consumer base. This led to a strong increase in revenues the following year as well as increased acceptance of Universal Studios Florida as a vacation destination.

In 2007, Universal Studios Florida earned a record \$92 million, more than twice its total the year before.

Moreover, although travel to Florida fell 1.8% to 82.4 million travellers in 2007, Universal City nevertheless saw a 3% increase in combined attendance for its Universal Studios and Islands of Adventure theme parks. Universal Studios alone reported, for summer 2007, a 12% increase in attendance level over summer 2006.

Some of the revenue and attendance increase may be attributed to Universal's addition of Blue Man Group to its line-up and publicity for the upcoming ride based on *The Simpsons*. However, its newfound drive to satisfy the emotional needs of consumers no doubt contributed to Universal's record success.

'We've benefited from the perfect combination of a robust marketplace, great new guest experiences, outstanding marketing, enthusiasm for the kind of entertainment we offer, and the promise of more to come,' said Bill Davis, president and chief operating officer of Universal Orlando.

Such a strong turnaround in one year is testament to the dedication of Universal Studios Florida's marketing team and highlights the potential value of psycho-ethnographic research.

FIGURE 1

### An example of laddering

#### ESCAPE

Fantasy/make believe  
Escape

Feels like you're really there  
(which means)

More than real life

If I'm really there, then I'm really not here  
(which means)

Universal Studios Florida provides a deeper and different level of escape when compared to Walt Disney World

It is only in your imagination  
(which means)

It's a make believe place  
(which means)