

Social Media & the Theme Park Audience

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During WWI, the David Sarnoff Research Center had perfected the science behind television. In the 1950's and 60's television reached its saturation level of 90 plus percent of all American households.

In the 1969, ARPANET bore the Internet. As with television, the Internet is still pressing forward in finding its' saturation levels in US households, currently with a 70% saturation level that is nearing total saturation. Upward movement of saturation is more driven by aged populations than income levels as well as die-hard groups who make up the 3% with no access to television, telephone or any communication devices.

Engagement Through The Internet

Since the Millenium, marketers have been attempting to harness behaviors of those on the Internet for a positive positioning of their products and services as well as provide immediate and directed messaging to guests and potentials through independent web sites.

With the advent of "open communication" through communities & personal pages, consumers are not only listening but are speaking, on literally everything, including entertainment experiences.

Ultimately It's All About Engaged Share

Just as with any theme park, competing for share within demographics segments, so will share play a role in messaging among peers within communities that are matched demographic targets of theme parks to...

- Drive attendance of new guests and potential increased visitation in the existing market
- Provide messaging opportunities and insights
- Generate "retail" revenue to cover soft costs

How Market Researchers View Social Media

As marketers look for the "silver bullet", market researchers measure the size of the audience and what the impact of the Internet is. In essence,

- Who is engaged
- How much of the market is engaged (whether active or passive)
- Is the Internet the "Silver Bullet"?

In 2008, Delta Market Research, Inc. a research company with 35 years experience in audience research and a long-term research supplier for both Six Flags and HERSHEY PARK, began a study to explore the Internet and how guests engage within the virtual world.

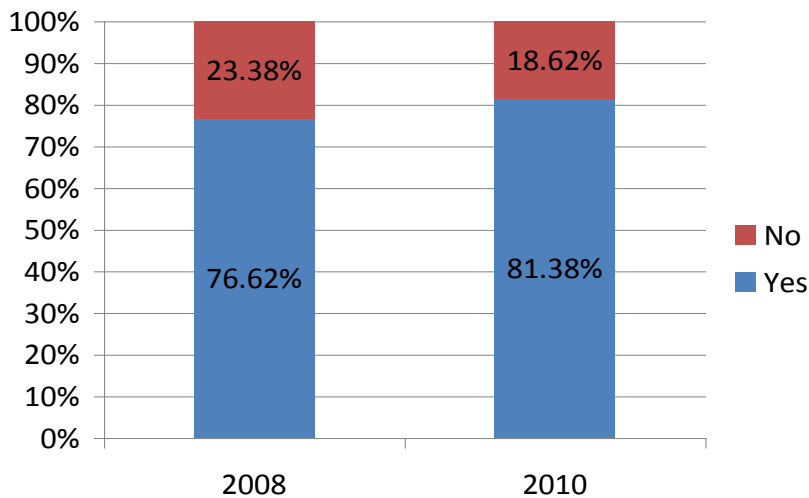
In 2010, the research was replicated to present the same statistically representative sampling of guests at a total of 12 theme park audiences across the US. The purpose of the follow up survey was to determine change and growth in the engagement by guests.

Survey Findings

CNET, through US Census determines that currently, the incidence of personal Internet access in the US is 70%. The theme park audiences studied had an incidence of 81% currently, a 5% increase from 2010.

This demonstrates two things that marketers and researchers should make note of...

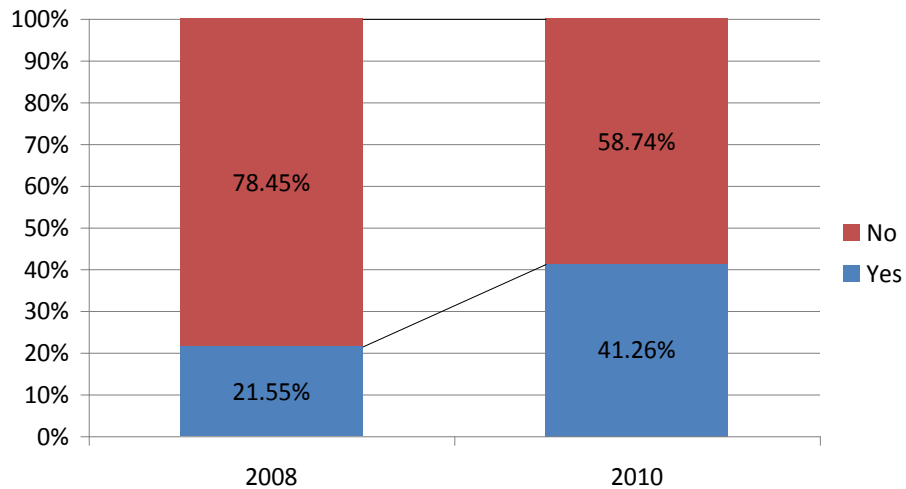
- For Marketers: Personal Internet access is on a course of “slow growth”, where transitioning population will play a role in continued growth. Internet efforts are accessible by 81% of your audience.
- For Researchers: As the virtual community grows, the Internet may be a viable source for representative, quantitative data rather than a qualitative source.



Personal Internet Access
(Base: ALL theme Park Guests '08 N = 4269 '10 N = 4125)

Among respondents with Personal Internet Access, the percent operating blogs has nearly doubled in the past two years, to 41%. This demonstrates a significant increase in the potential for advocacy realization in the Virtual World. With a 95% positive mention (unchanged since '08), there is a potential for positive impact on new entrants through the pass along theory.

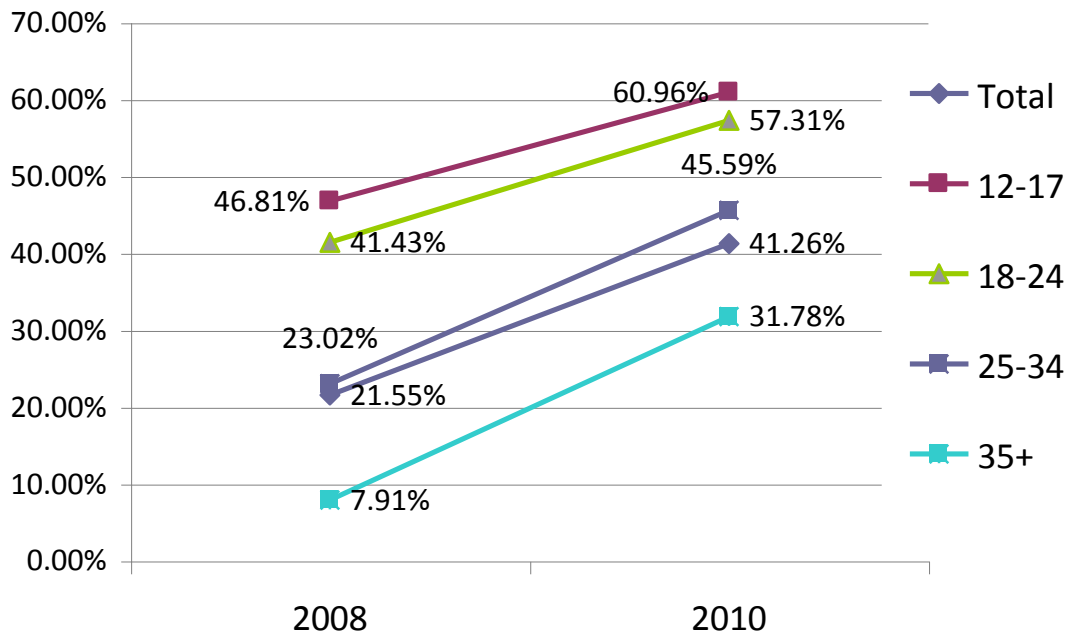
In terms of the entire theme park audience, currently one third (34%) operate a personal blog.



Personal Blog Incidence among those with Access

Among those operating a blog, there are some interesting movements that should be noted by Marketers and researchers alike:

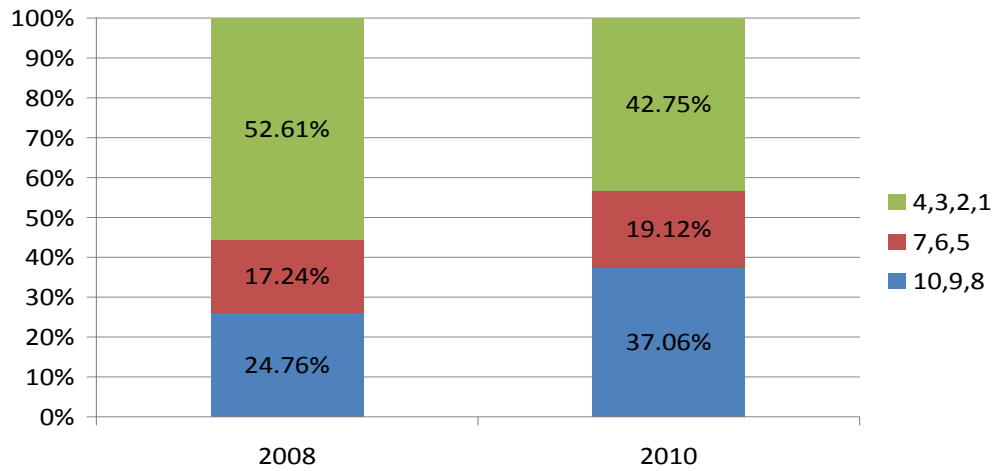
- The fastest growing group of those “engaged” in Social Networking is 35 plus in age.
- A 40% disparity based on age has been reduced to 30%, indicating that engagement in the Virtual World is evolving. Although youth are more likely to be engaged in the Virtual World, age groups are coming slowly into parity.
- Currently females are more “engaged” than males.
- As engagement by an aging Virtual Community occurs, marketing efforts are no longer restricted to younger audiences.



Blog Operators by Age (Trend)

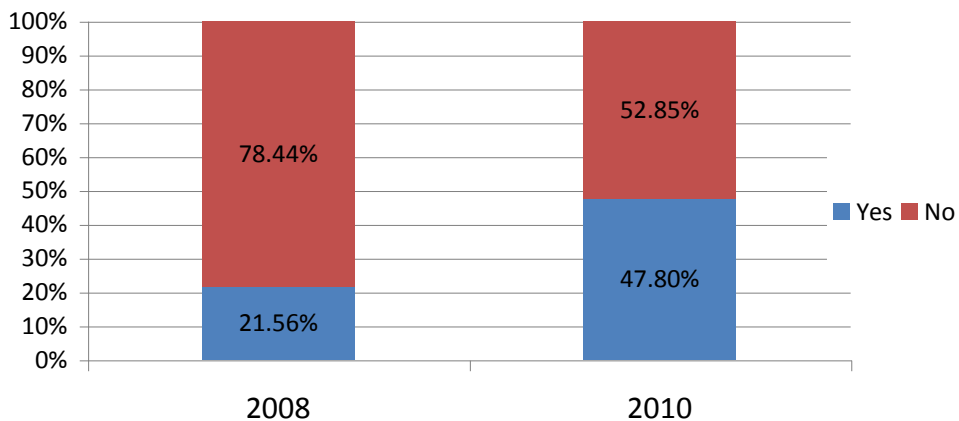
Among those that operate blogs, there is a significant increase in the incidence of “likelihood to Blog” about a theme park experience.

On a ten point scale, it is interesting to note that although middle three box has remained statistically stet from '08 to '10, the top three box has significantly increased, indicating that those engaged in the Virtual World are trending upward in likelihood to mention a theme park experience.



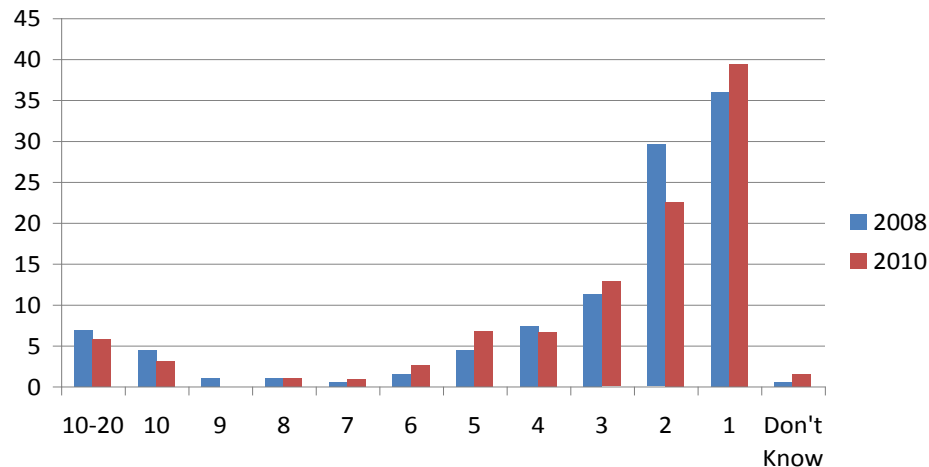
Likelihood to Post (future) About A Theme Park Experience Among Bloggers

It is interesting to note that although in 2008 22% of 25% top three box was realized, in 2010 likelihood to post (future) is showing a decline from Ever Post (past behaviors) among guests operating blogs.



Ever Posted (Past Behaviors) About A Theme Park Experience Among Bloggers

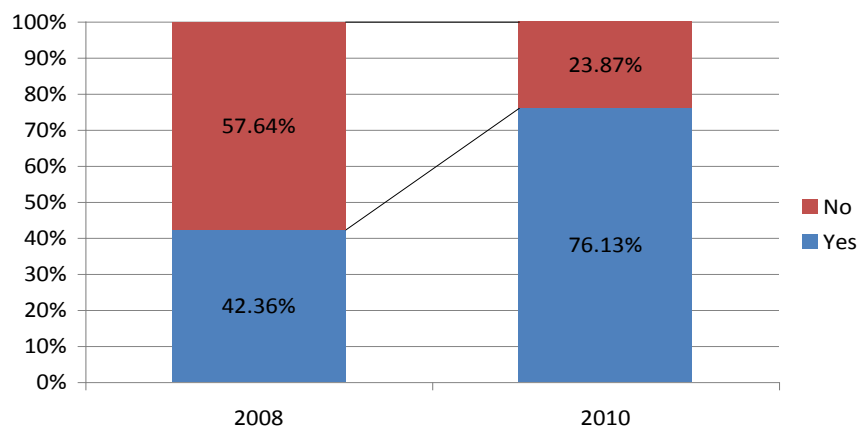
Among Blog Operators, the number of postings within their own blogs has demonstrated a stet pattern with 2008 data, indicating that, although entries are made by more guests, the number of posts among the significant majority remains at either one or two posts while bloggers with a high incidence of posts remains stet.



Number of Posts Among Bloggers

Among bloggers who were asked if they blogged about their most recent theme park experience, a significant shift has occurred.

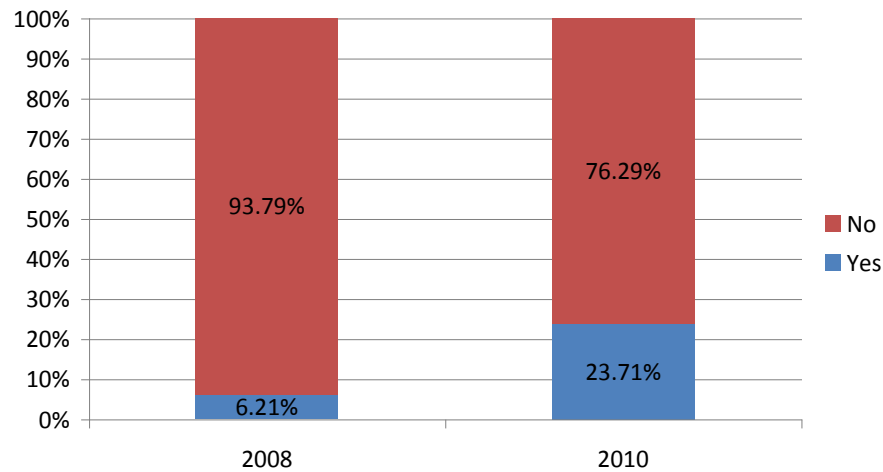
Among those “engaged” in Internet Communities who posted about a theme park experience, 76% reported that they posted about their most recent experience. It is interesting to note that the difference by age groups among those engaged (posters) has doubled among teens, but tripled among those 35 plus, indicative of the propensity of new entry by older respondents into Internet Communities.



Bloggers About Most Recent Theme Park Experience

In opening up the question of posting to all guests with Personal Internet Access we can see the incidence of posters who post either inside or outside of their own personal blogs.

The net impact of posters within the Virtual World is 24% among all theme park guests studied. This demonstrates a significant increase in the impact of the audience in the Virtual World in the areas of advocacy, with 95% positive posts.



Ever Posted Anywhere About Any Theme Park Experience Among Those With Personal Internet Access

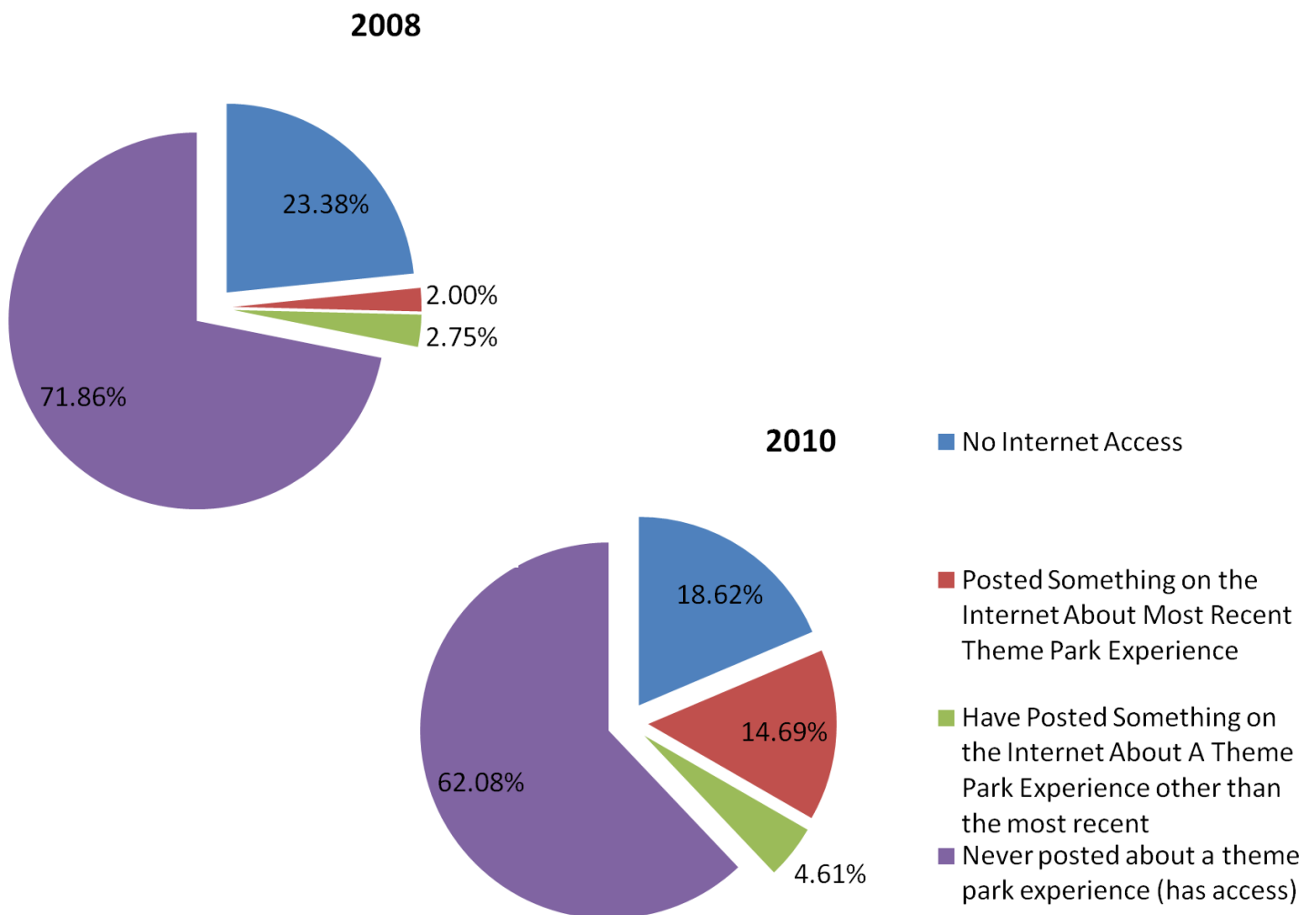
The net impact of change from 2008 to 2010 on the entire audience composition demonstrates that the Social Networking Community is a growing part of the Theme Park audience as a whole, providing opportunities through advocacy to create a pass along affect with potentials.

The Impact among the total Theme Park audience in comparing 2008 to 2010 is dramatic, with guests posting about their most recent experience increasing from 2% to 15%.

However, with total engagement at 20% in 2010 from 4% in 2008, we are seeing two dynamics:

- The emergence of the Social Communities Interacting
- The viewing of an emerging communication among theme park guests

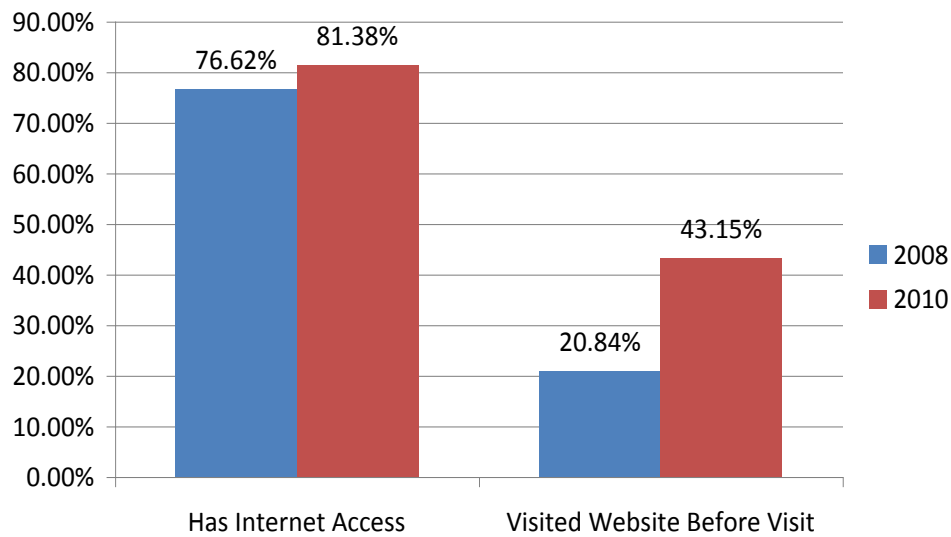
However, even though emerging, 62% of the statistically representative theme park audience has not engaged in posting about a Theme Park Experience.



Following Key Targets Through The Social Media Process

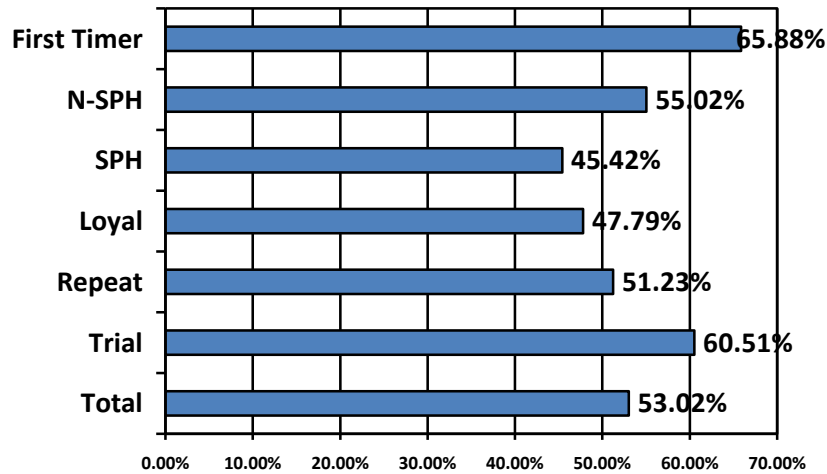
In comparison with 2008, there is also a dramatic increase in the number of guests visiting theme park based and peripheral web sites.

When asked what web sites were visited, of 1800 mentions only 2 mentions were outside the dedicated theme park web sites (one Facebook mention and one Trip Advisor mention).



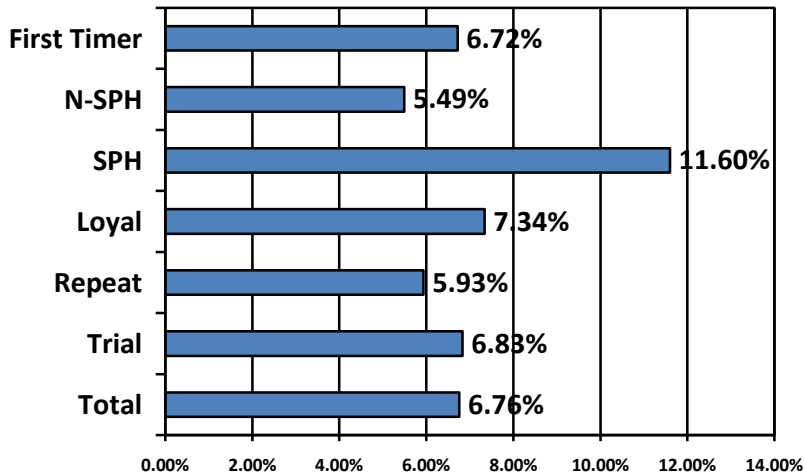
Visited Any Web Site Prior to The Park Visit

When looking at the incidence within key targets of those visiting Theme Park web sites and peripherals, we see that first time visitors and trial visitors (one visit in past three years) comprise the highest incidences, while less than half of Season Pass Holders visited web sites and peripherals prior to a visit.



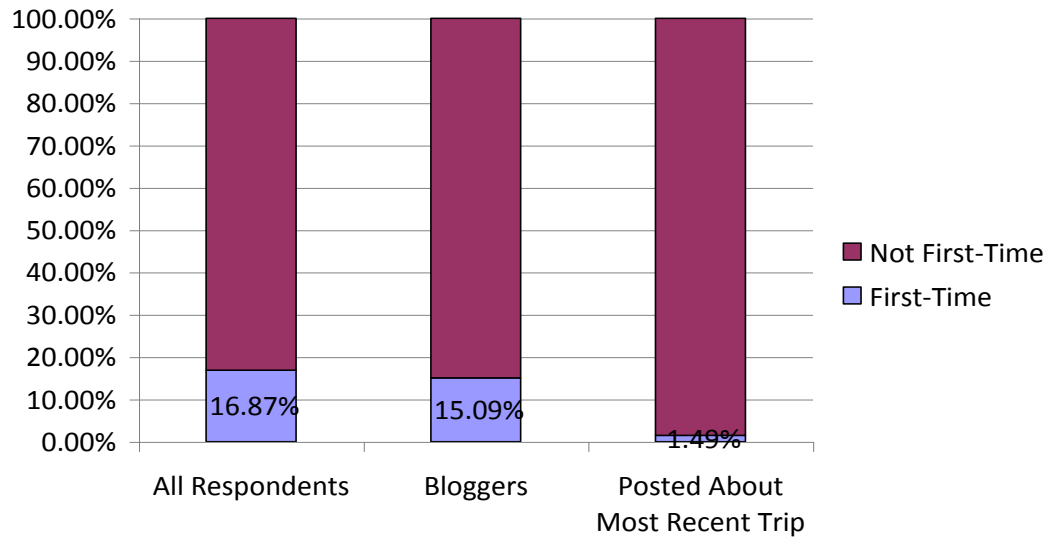
**Visitors to Theme Park Web Site and Peripherals Prior to Visit
Among Theme Park Guests with Internet Access**

When asked if they visited a theme park web site or peripheral following a theme park visit, 7% of all guests visited. Of those that visited a theme park web site following their theme park experience, there was a dramatic shift among key targets, significantly led by Season Pass Holders and loyal visitors.



**Visitors to Theme Park Web Site and Peripherals Following Visit
Among Theme Park Guests with Internet Access**

With new audience entrants being anywhere from 13% to 33% of theme park audiences, New entrants (first timers) are a key marketing target. Among the entire audience, 17% of the audience surveyed were first timers, 15% have the ability to blog and realized engagement through posting is only 1.5% of the total audience, indicating that first time theme park visitors are not sufficiently motivated to be engaged in Social Networking/Media by posting.



New Entrée's

Conclusion

- Personal Internet Access among theme park visitors is higher than national averages, currently at 81%.
- Those engaged in the Social Networking (Media) process have demonstrated dramatic increases since 2008 (doubling); however, the net impact is 20% among the entire theme park audience.
- Following a theme park visit, visitors to web sites and peripherals are more likely to be those guests who are loyal to a theme park. Once a visit has occurred, theme park sites and peripherals lose 93% of the audience.
- With 95% positive postings, those engaged in Social Media through blogging can create an opportunity for new guests using advocacy.
- As with television in the 50's, the Internet is demonstrating rapid growth in Social Media among theme park visitors and should continue to be tracked to determine at what point Social Media can be determined a "Mass" media rather than a Marketing tool for engaging an existing audience.
- Traditional Media and OOH (Out of Home) should not be discarded as a means of reaching new audience entrées currently. Until there is greater reach by the Internet and greater engagement by audience, new audience is best attracted by traditional media and well executed targeted OOH (35% of new entrants do not go to any web site or peripheral, even with Internet access).

For More Information or to answer any questions you have about the
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