



SOCIAL MEDIA

AND

THEME PARK

GUESTS



Background/Research Goals

Background

Internet access and the advent of Social Media as a household concept has created demand for outcome measurements of the internet as a media, and for impact measurements of social media engagement among theme park attendees.

Our study tracks these measurements over time, looking at current results in 2010 vs. the results in 2008.

Research Goals

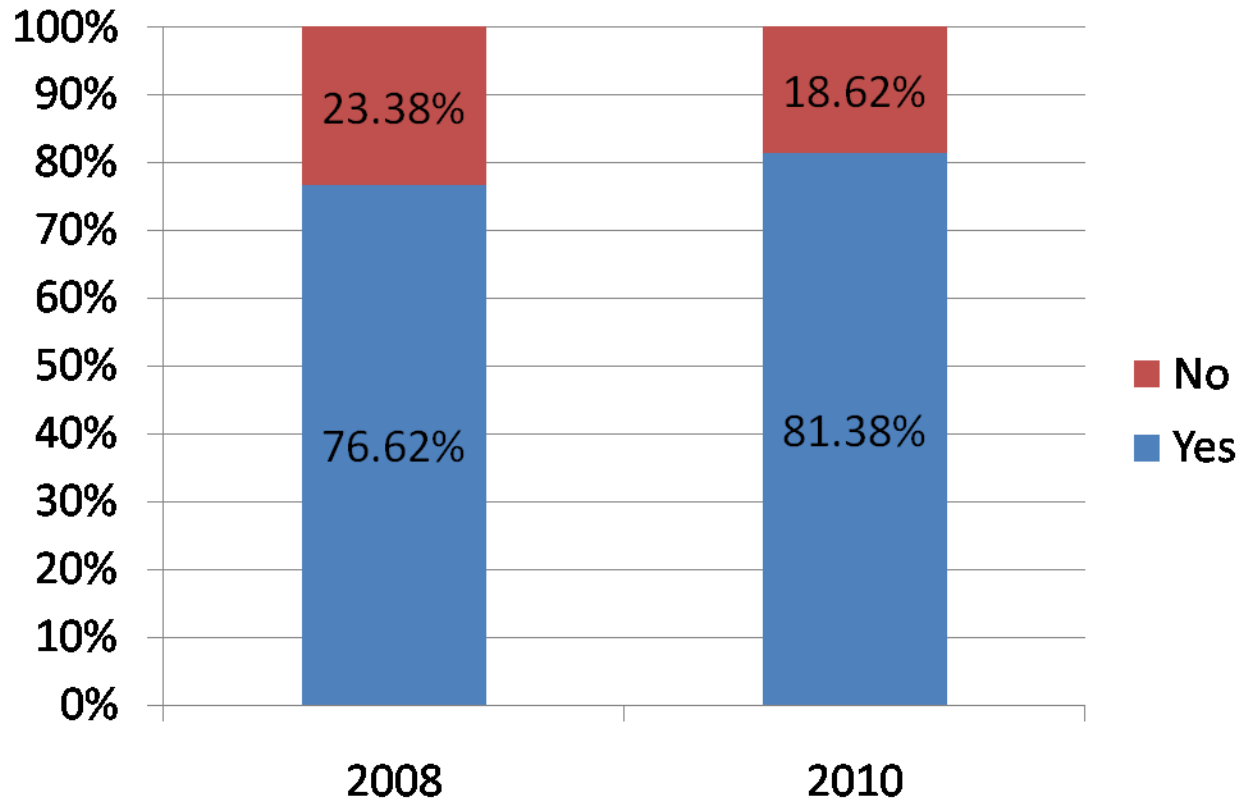
- Determine percent of theme park audience with internet access.
- Determine percent of theme park audience that visits theme park web sites prior to visitation.
- Determine percent of theme park audience that is likely to post about a theme park experience.
- Determine percent of theme park audience that has already posted about a theme park experience.
- Track changes and trends from 2008 to the present.

Social Media

- Who is participating?
- What sorts of theme park guests are social media participants?
- What sort of social media participants are these theme park guests?
- What changes have there been in the composition of this overlapping “social media participant + theme park guest” group in the last 2 years?

VIRTUAL VS. REAL WORLD

INTERNET ACCESS AMONG PARK VISITORS

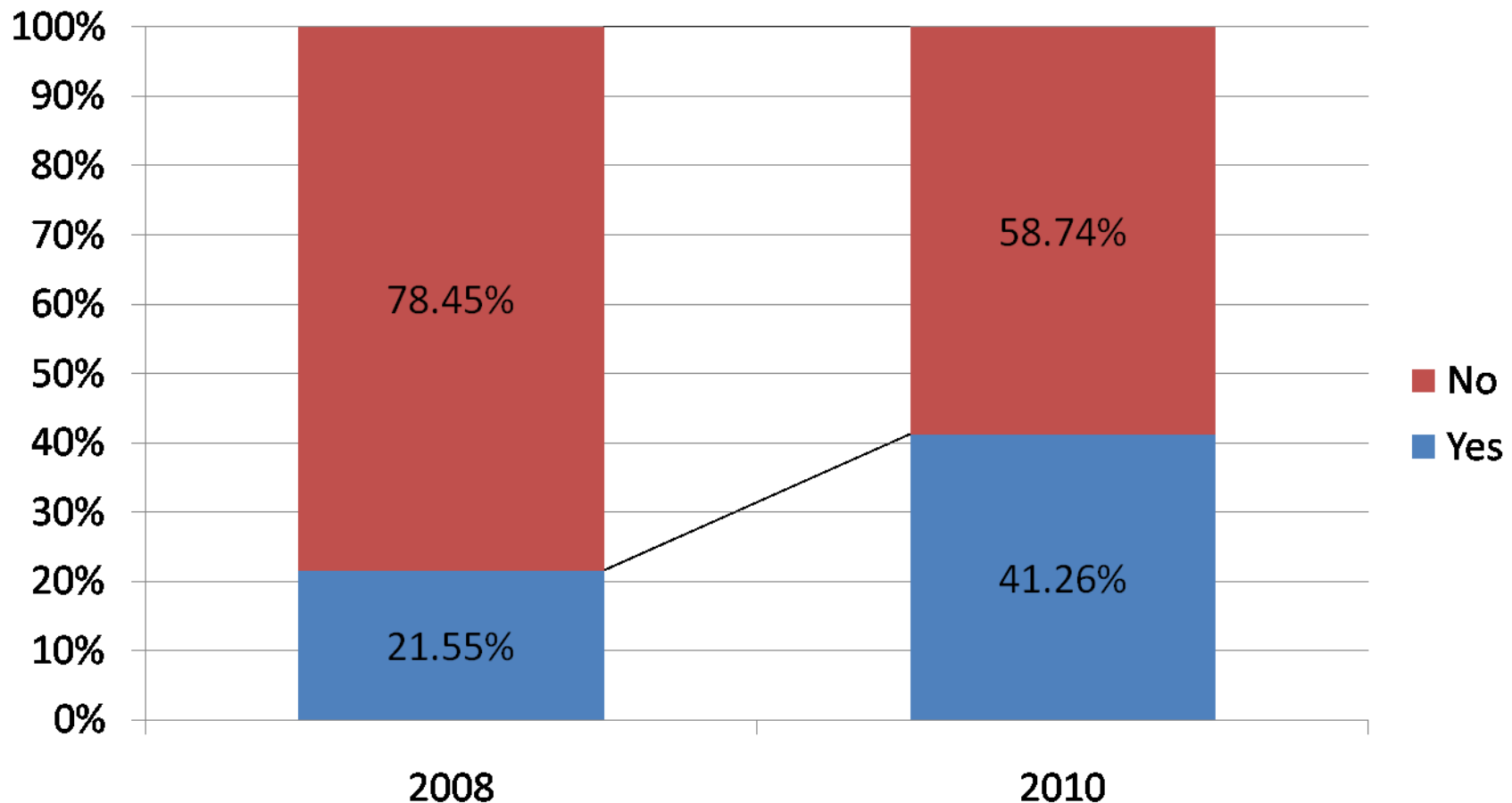


[Q11]. Do you have personal access to the Internet?

Of 2008 Base (4269 respondents), 76.62% say "Yes".

Of 2010 Base (4125 respondents), 81.38% say "Yes".

PERCENTAGE OF THEME PARK VISITORS WITH INTERNET ACCESS OPERATING BLOGS

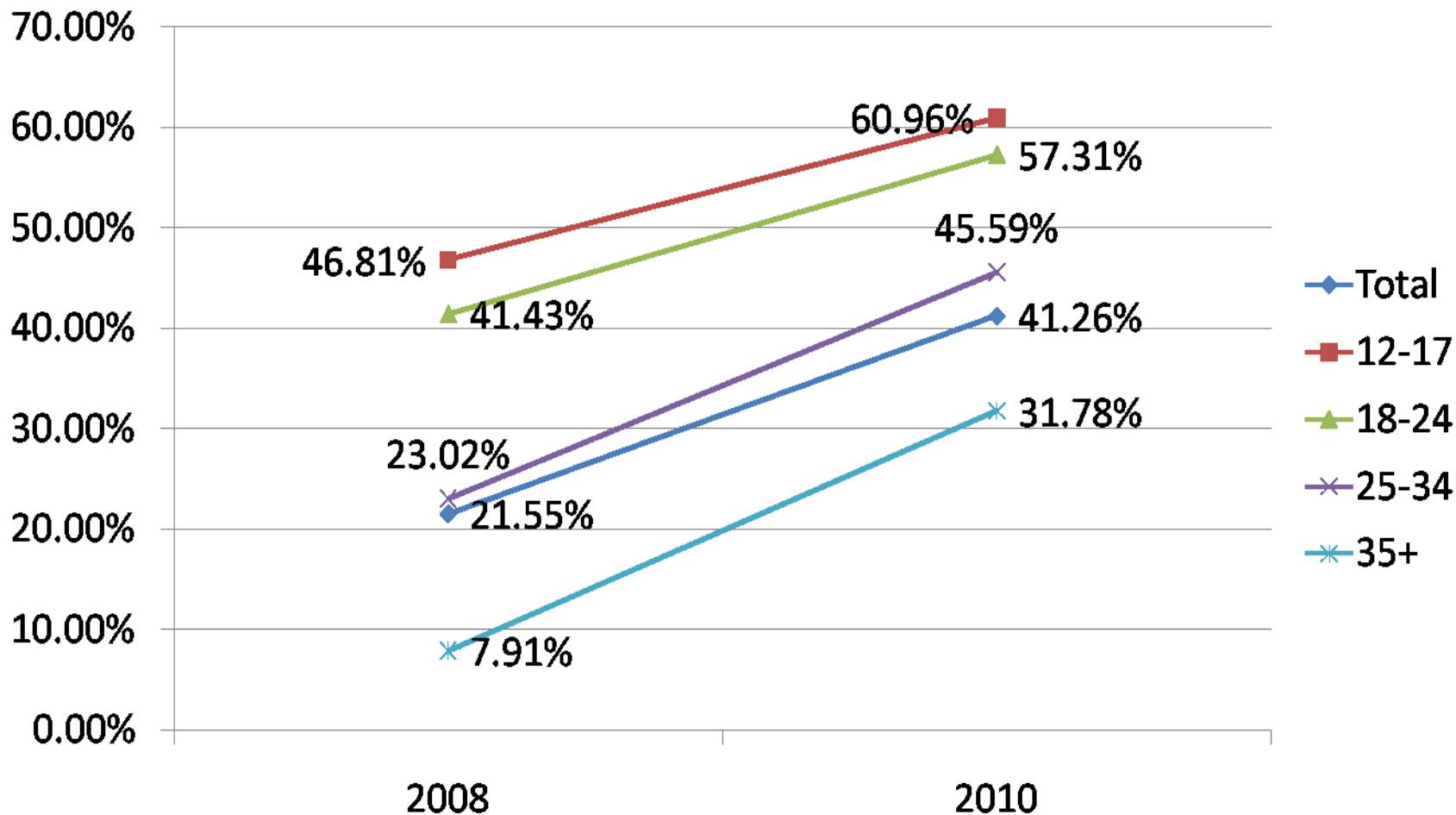


[Q16]. Do you operate a blog through a web site like Live Journal, FaceBook or MySpace?

Base 2008 = 3271 respondents

Base 2010 = 3357 respondents

PERCENTAGE OF THEME PARK VISITORS WITH INTERNET ACCESS OPERATING BLOGS, BY AGES

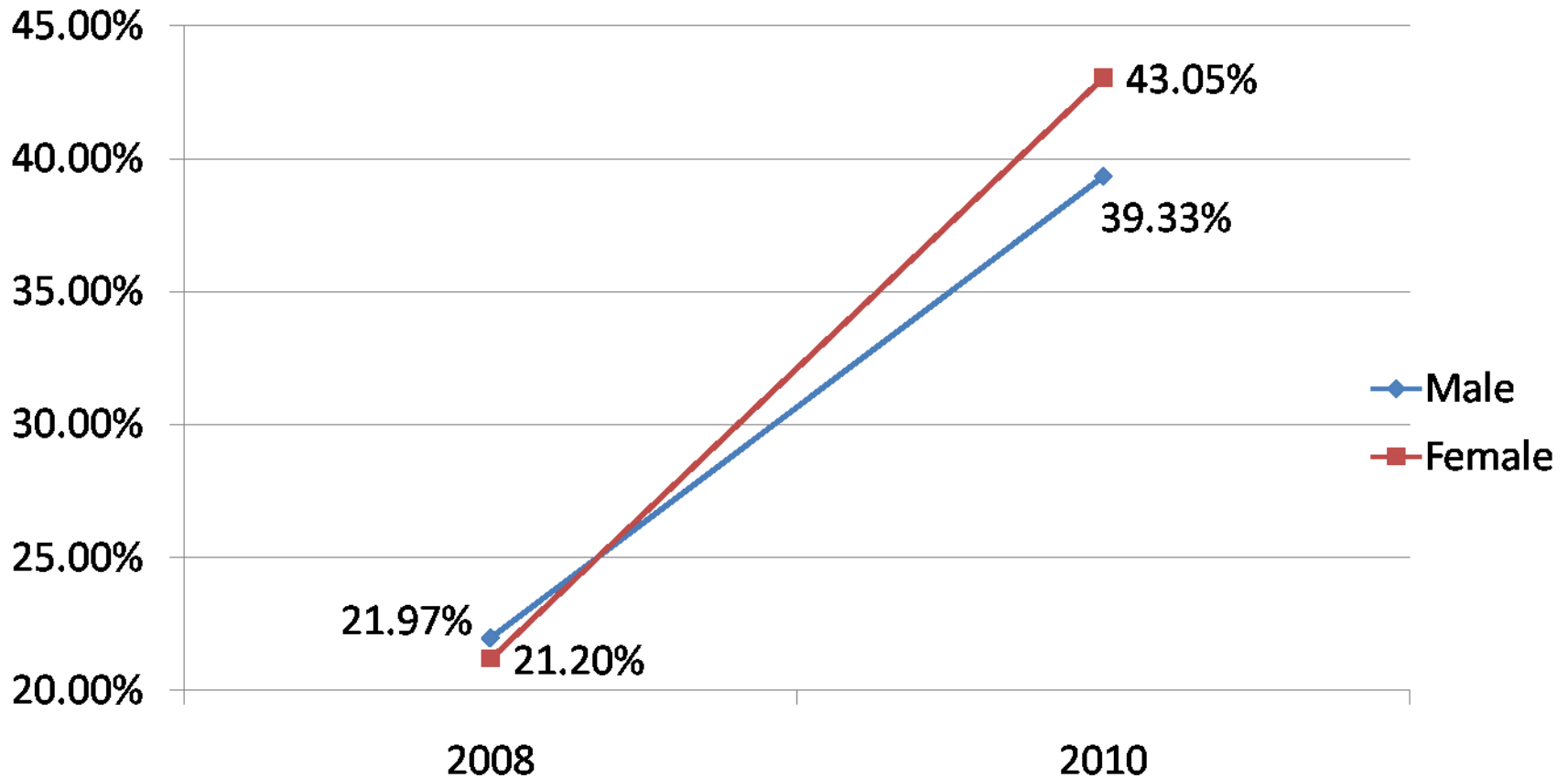


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PERCENTAGE OF THEME PARK VISITORS WITH INTERNET ACCESS OPERATING BLOGS, BY GENDERS

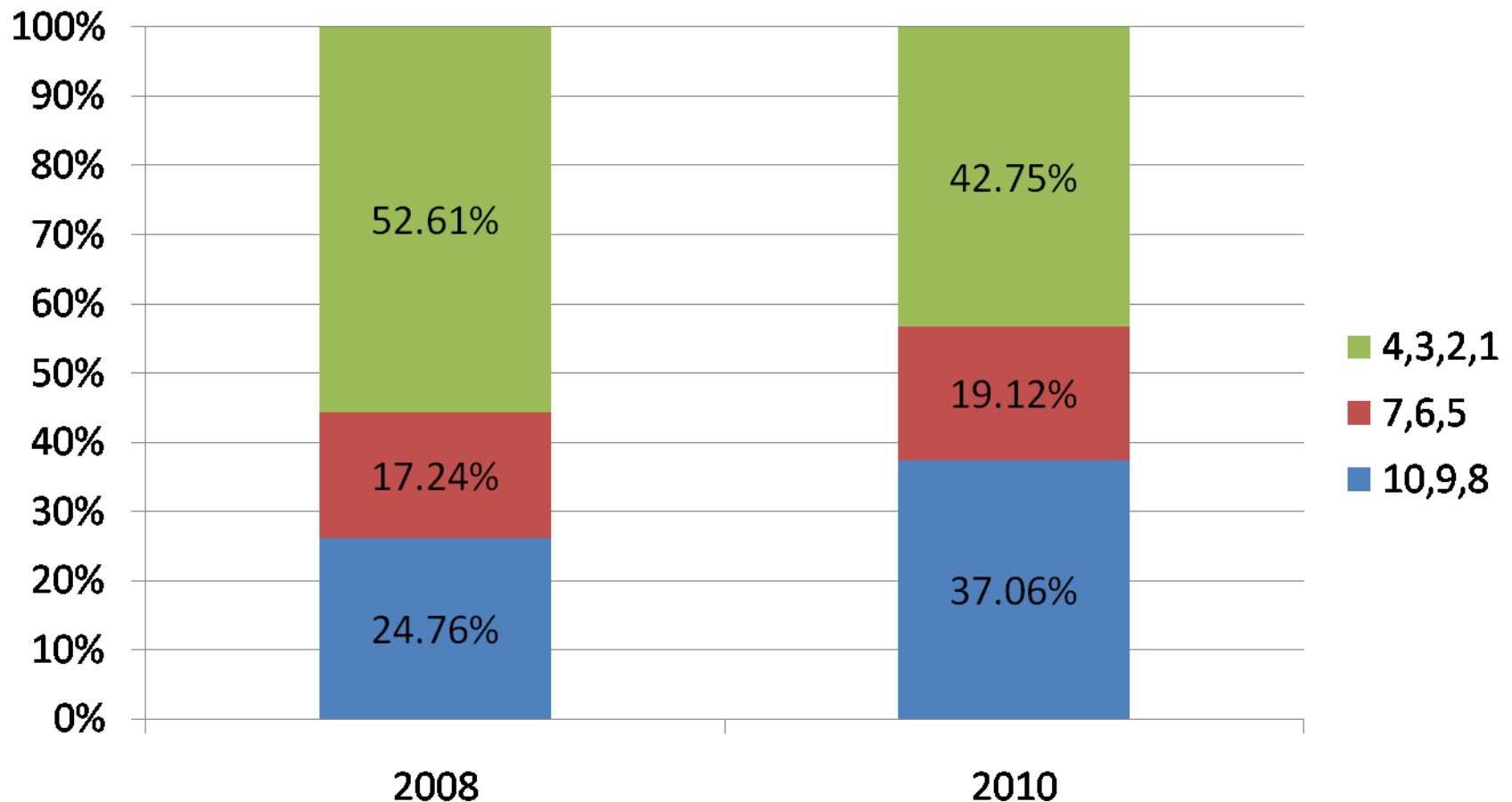


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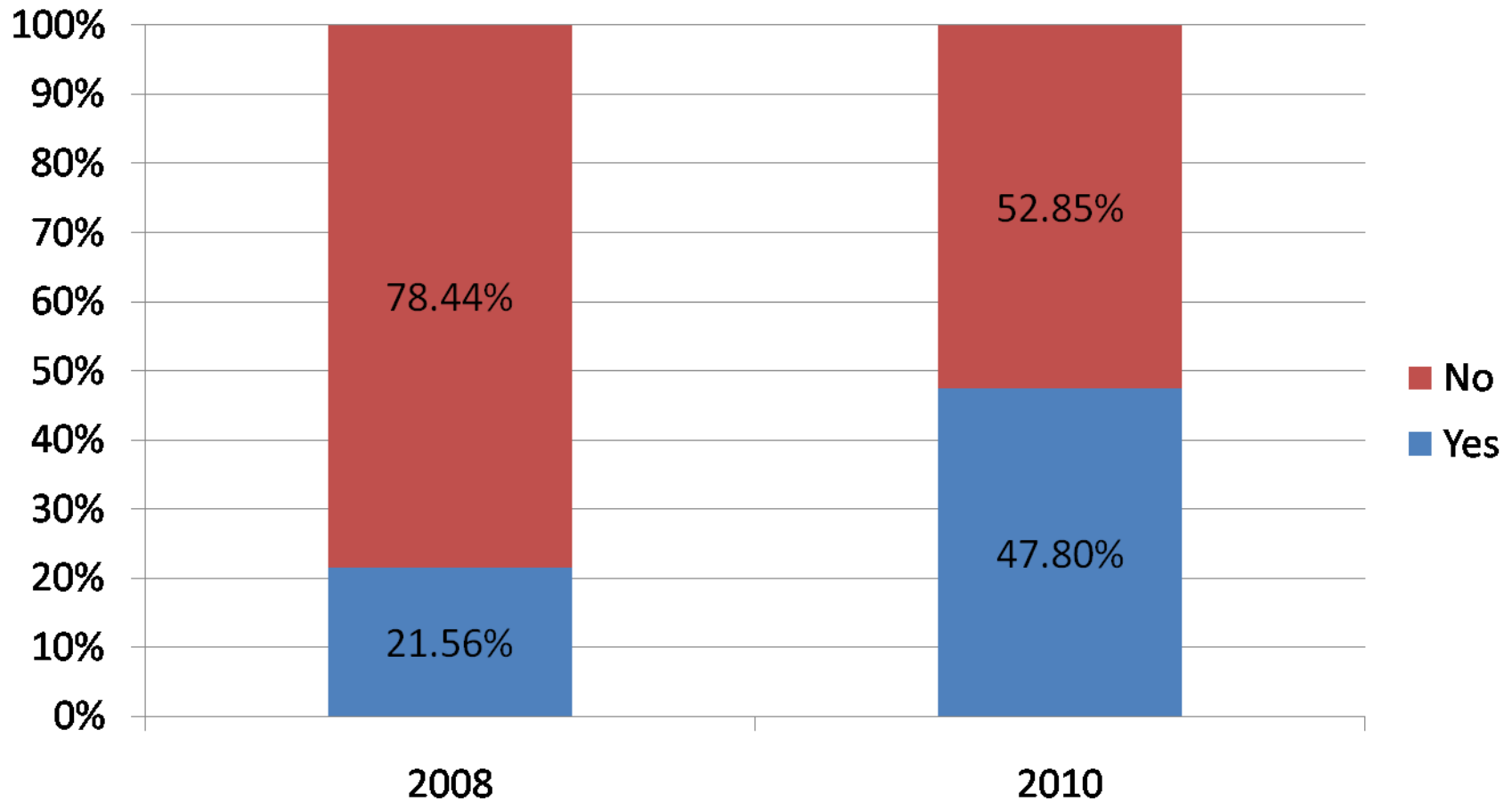
Base 2010 = 3357 respondents

Likelihood of Posting about a theme park experience among park guests who operate blogs.



[Q17]. On a scale of 1 to 10 where 1 means you would never enter anything about a theme park experience and a 10 means you would definitely post something about theme parks, what would you rate?

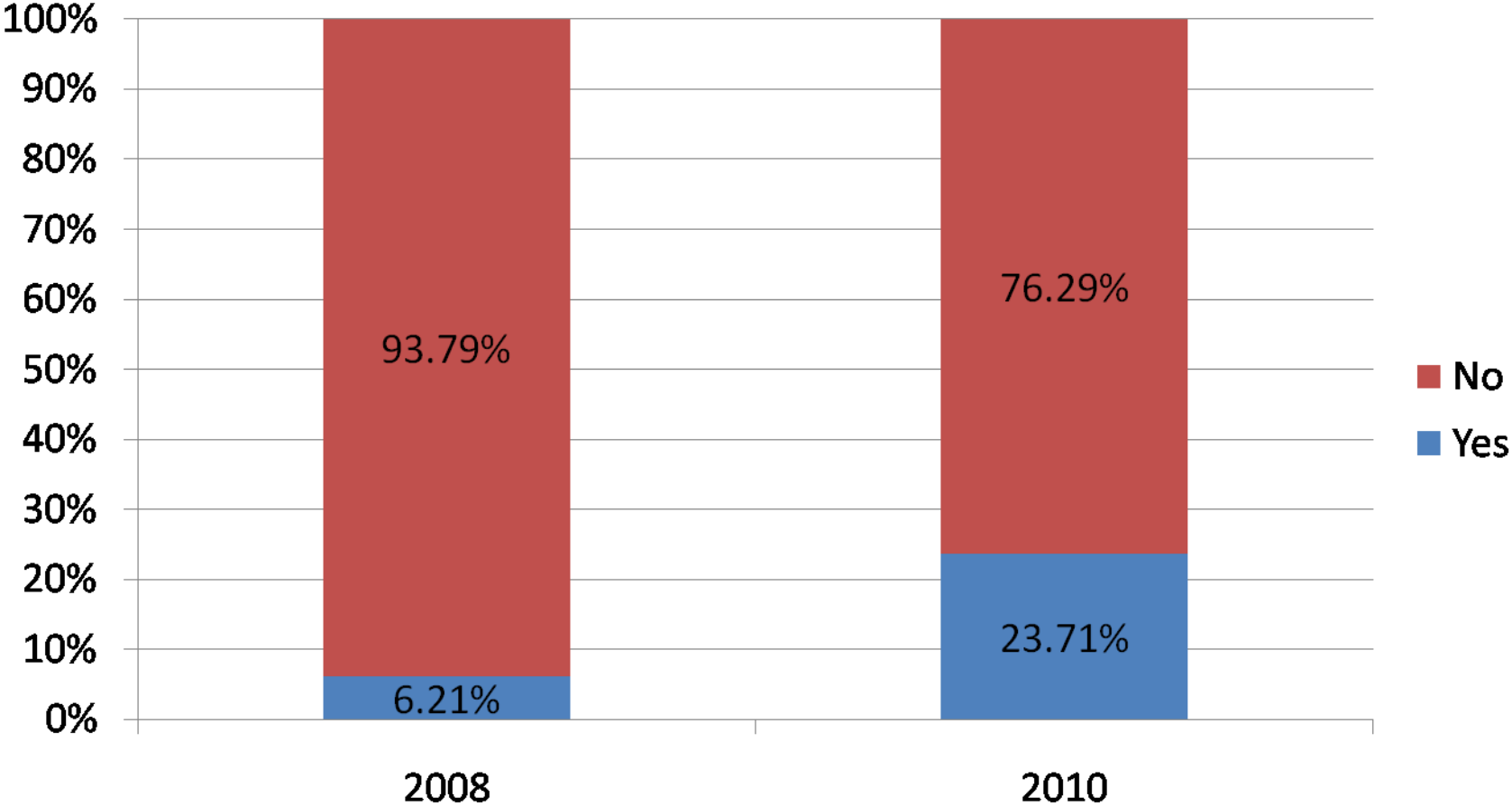
How many bloggers have actually posted about a theme park experience on their site?



[Q18]. Have you ever posted any information on your site about a theme park experience?

[2008 Base = 705, 2010 Base = 1385]

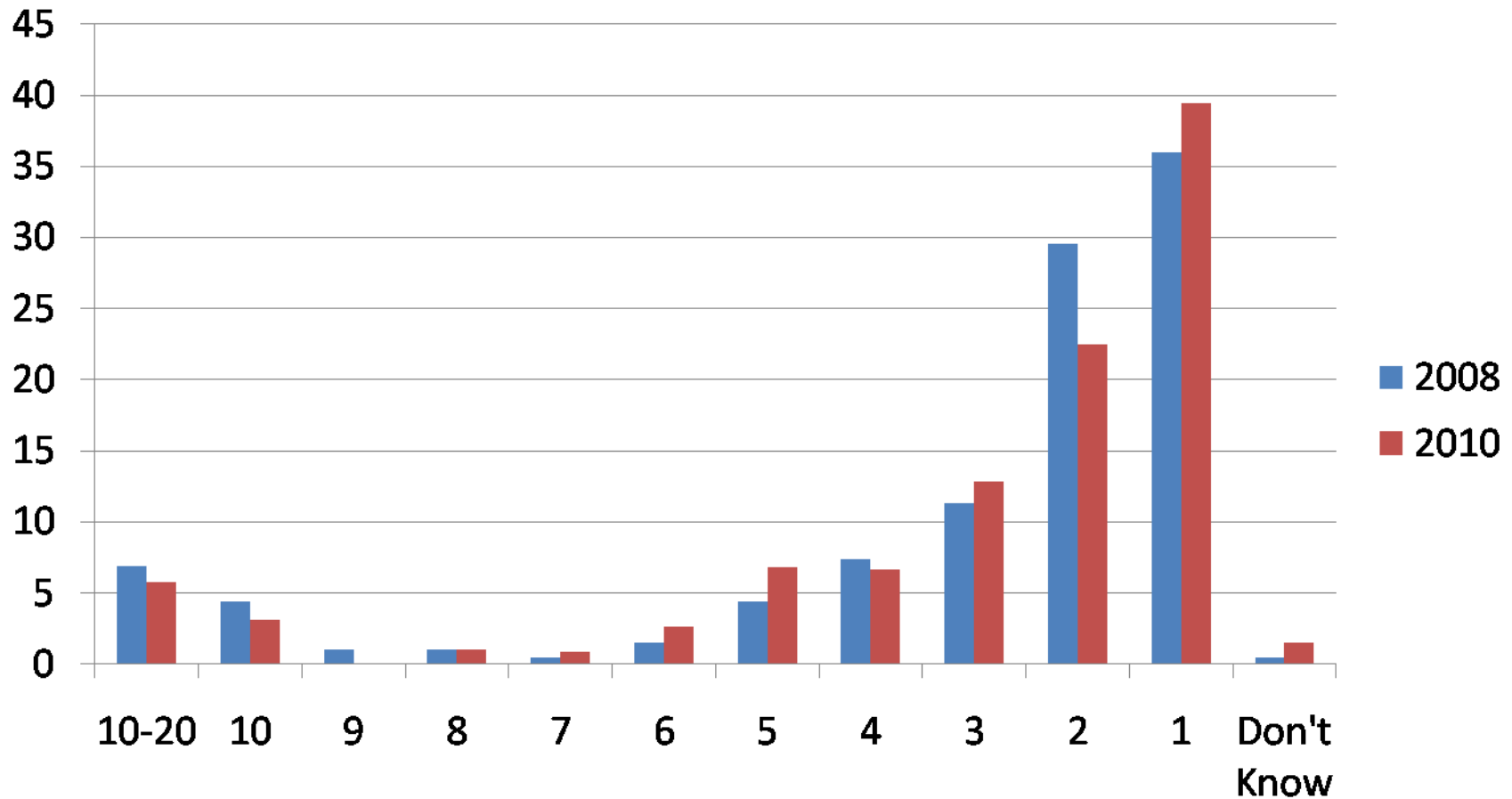
How many theme park visitors who have internet access have actually posted about a theme park experience on any site?



[Q19]. Have you ever posted something on the Internet at ANY SITE about a theme park experience?

[2008 Base = 3271, 2010 Base = 3357]

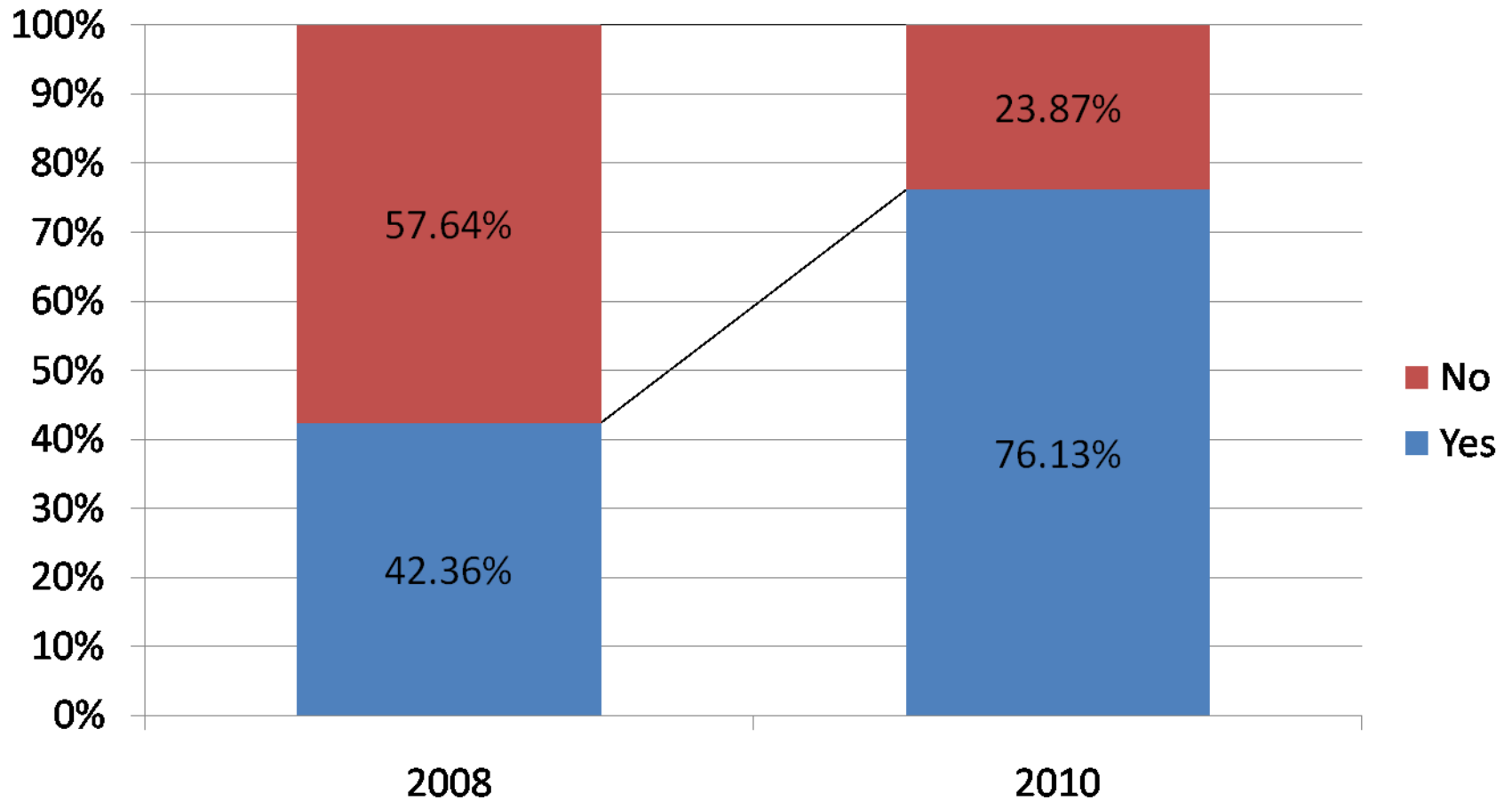
Among park guests who have posted something about a theme park experience, how many times have they posted something about a theme park experience?



[Q110]. How many times have you done this about a theme park experience?

2008 Base = 203 respondents
2010 Base = 796 respondents

Among those who have posted about a theme park experience on any site, what percent posted about their most recent theme park experience in 2008 vs. in 2010?

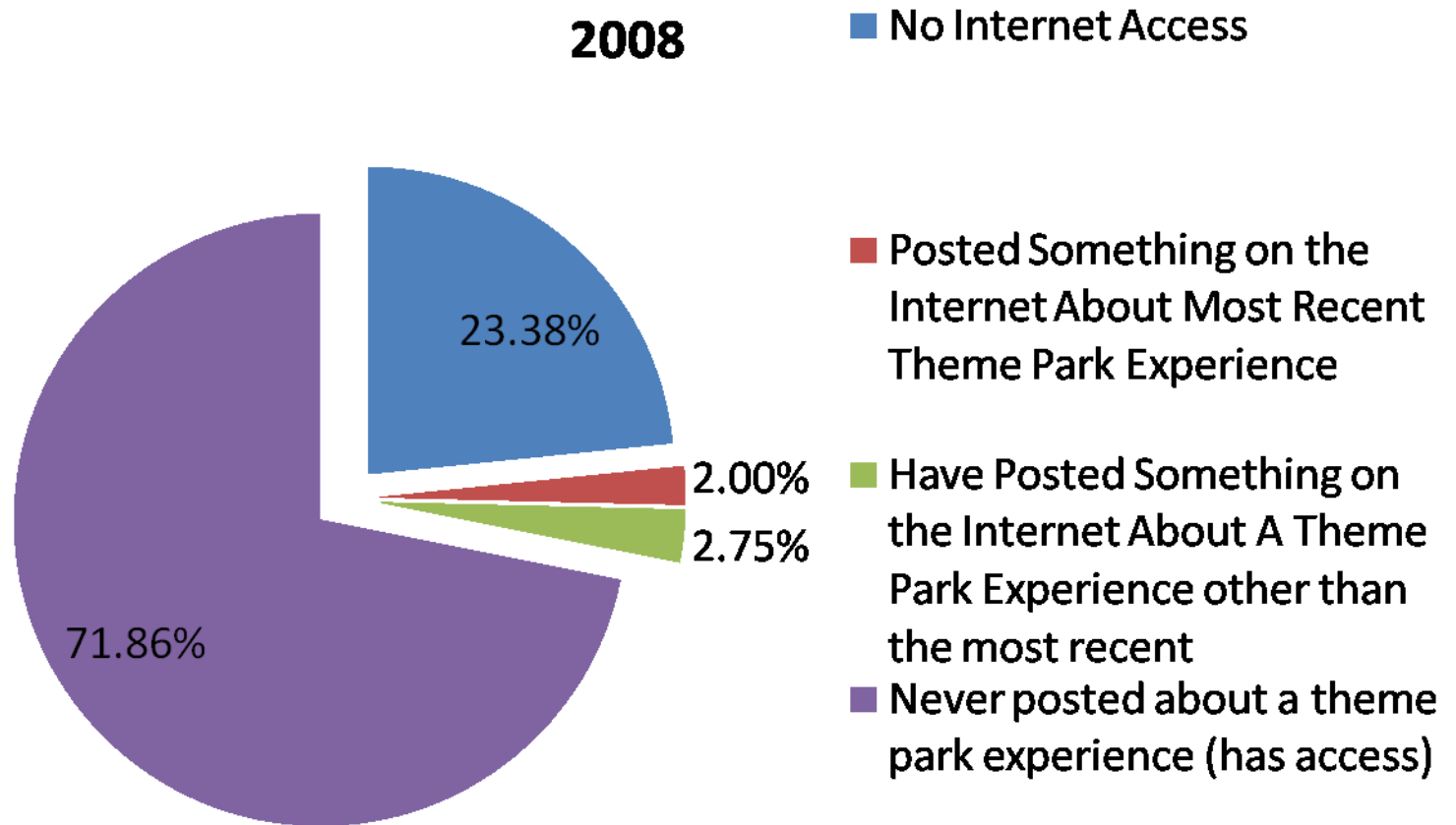


[Q111]. Did you post anything about your recent trip?

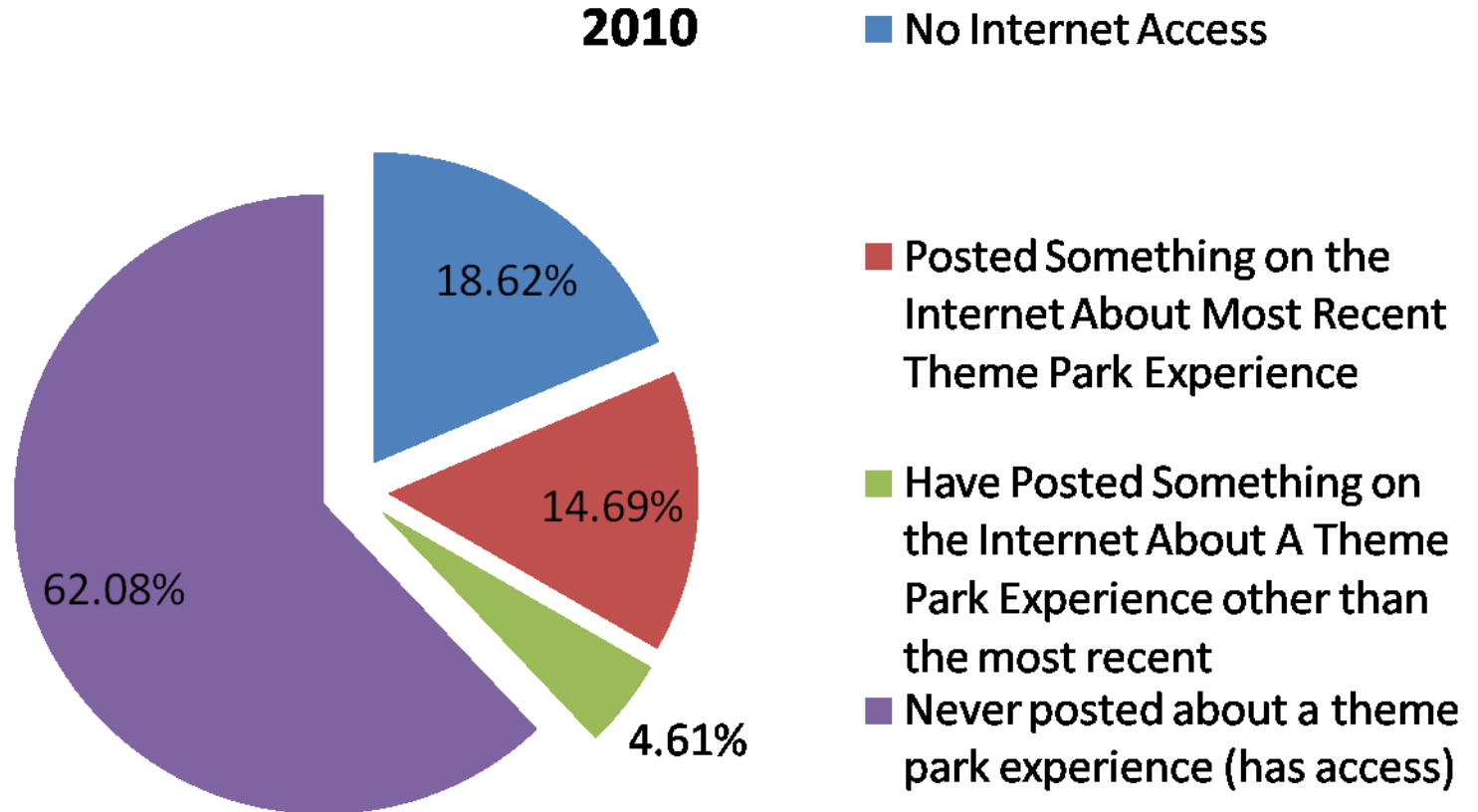
2008 Base = 203

2010 Base = 796

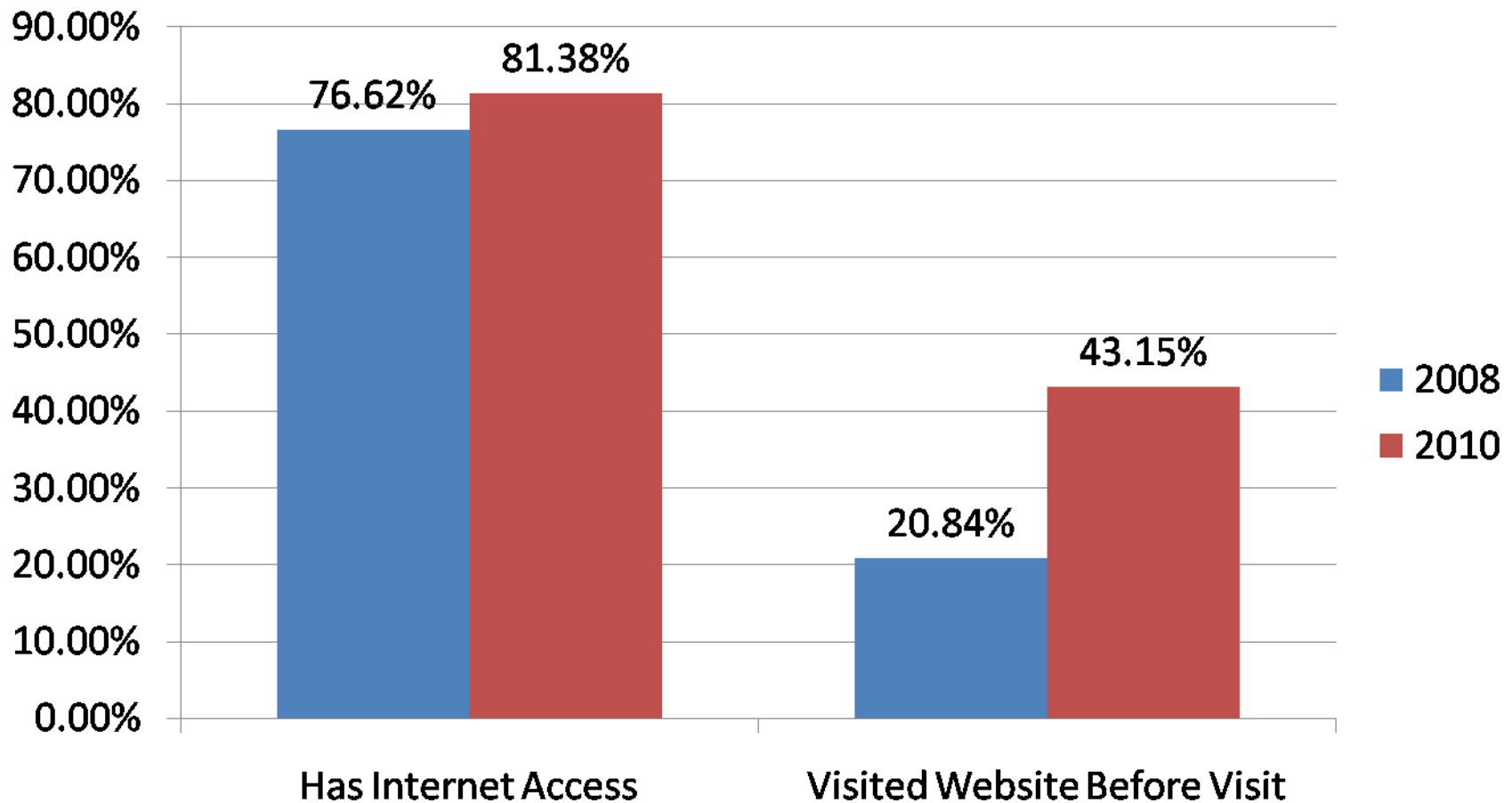
In 2008, 4.75% of Theme Park Visitors had Ever Posted something on the Internet about a Theme Park Experience.



In 2010, 19.3% of Theme Park Visitors had Ever Posted something on the Internet about a Theme Park Experience.



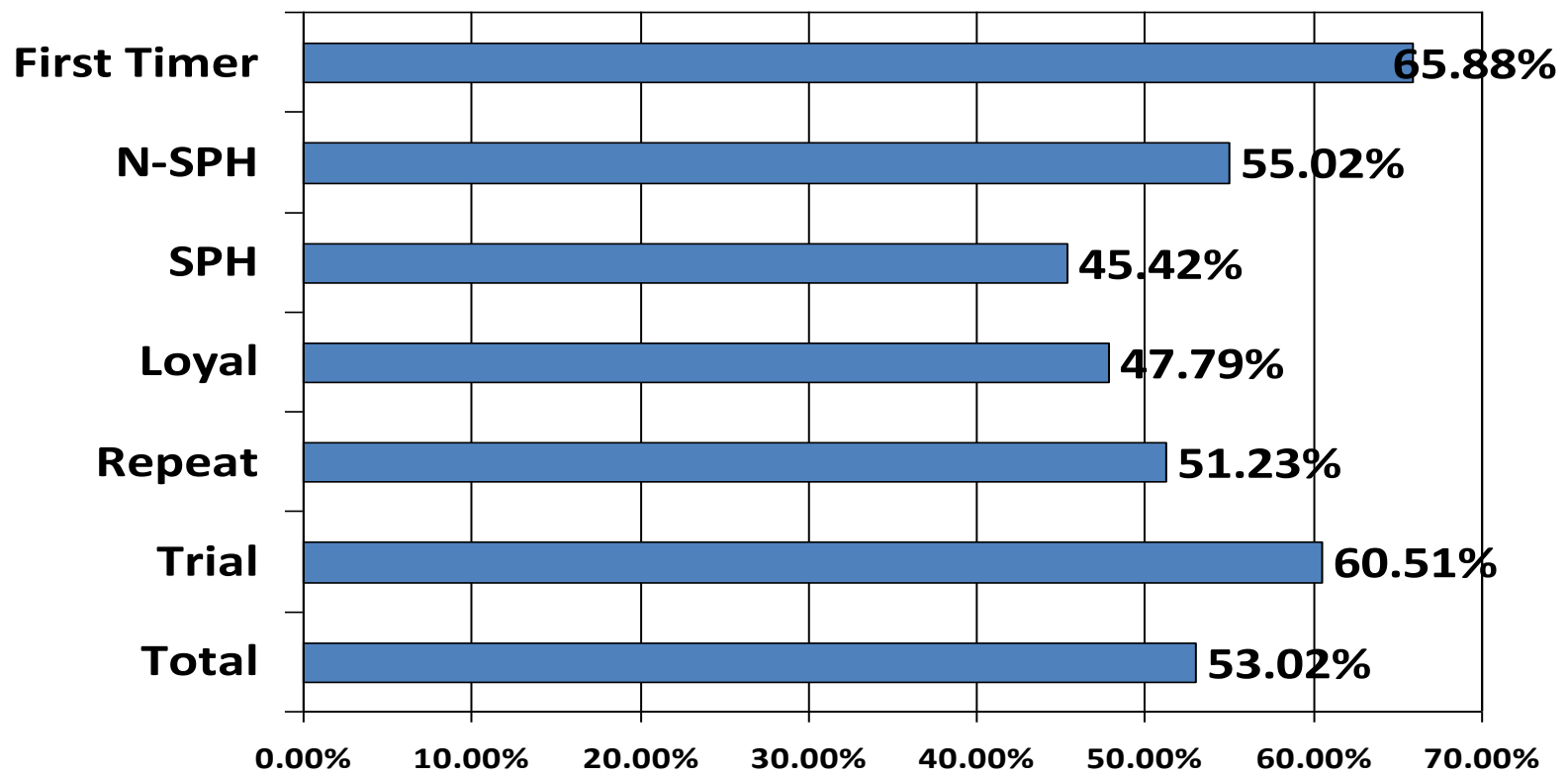
Visited Related Website Prior to Visiting the Park



[Q12]. Prior to your visit to {Park}, did you visit any web sites to learn information about...
Chart Base is Total Respondents 2008=4269, 2010=4125

Visited Related Website Prior to Visiting the Park

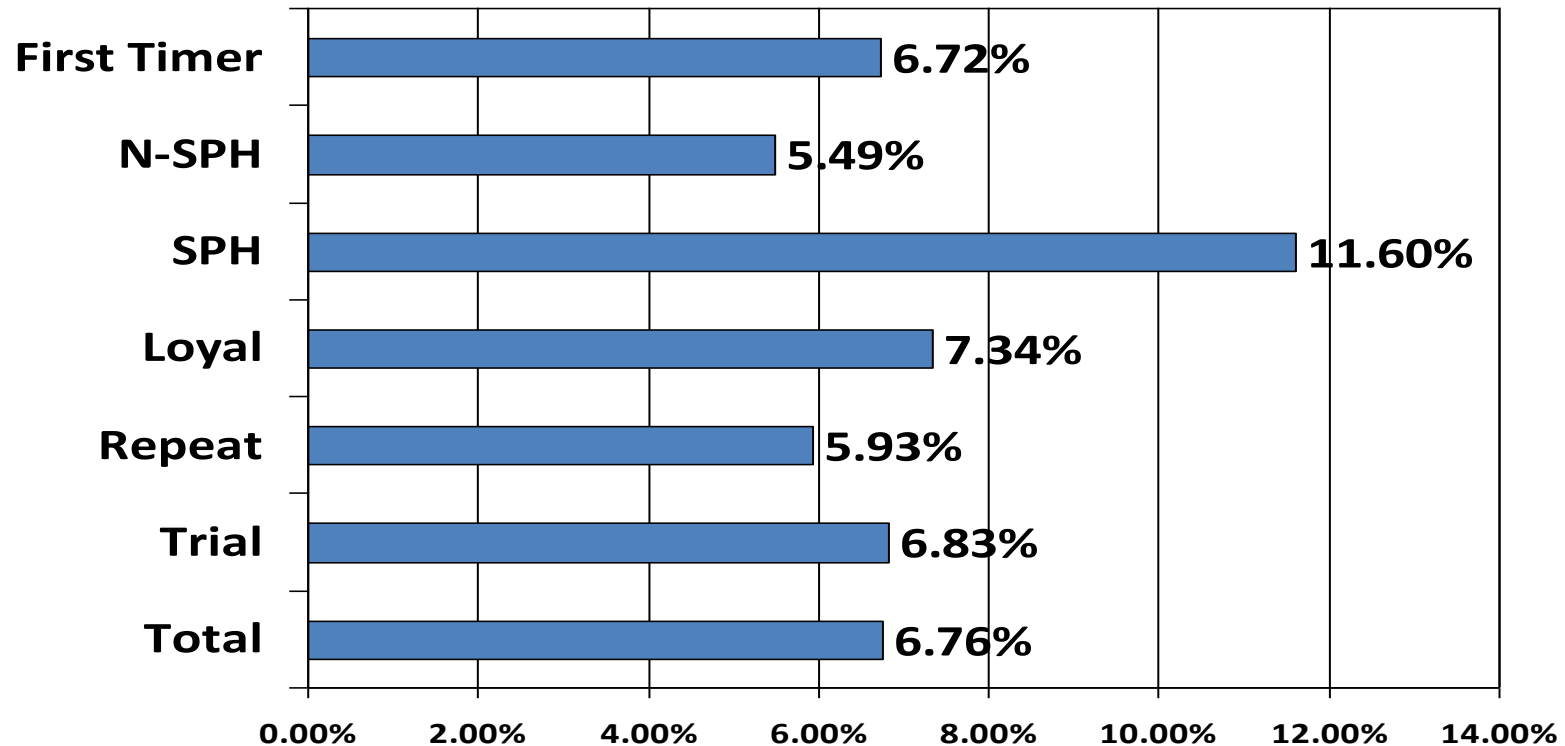
More than half of all Park guests visited a related website before visiting the Park. A notably higher percentage of First-Time and Trial Guests visited a related website before going to the Park.



[Q12]. Prior to your visit to (Park) , did you visit any web sites to learn information about (PARK)?

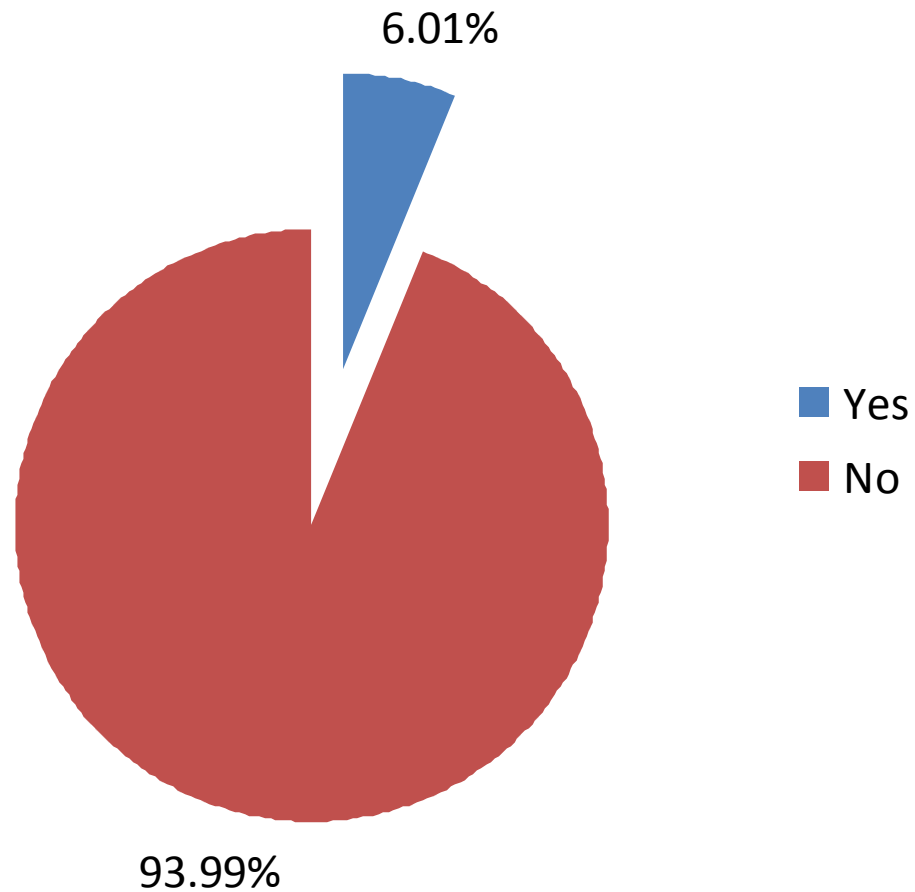
Visited Related Website After Visiting the Park

While only 6.76% of Park guests visit a related web site after their visit, a considerably higher percentage of Season Pass Holders (11.6%) visited a related website after visiting the Park.



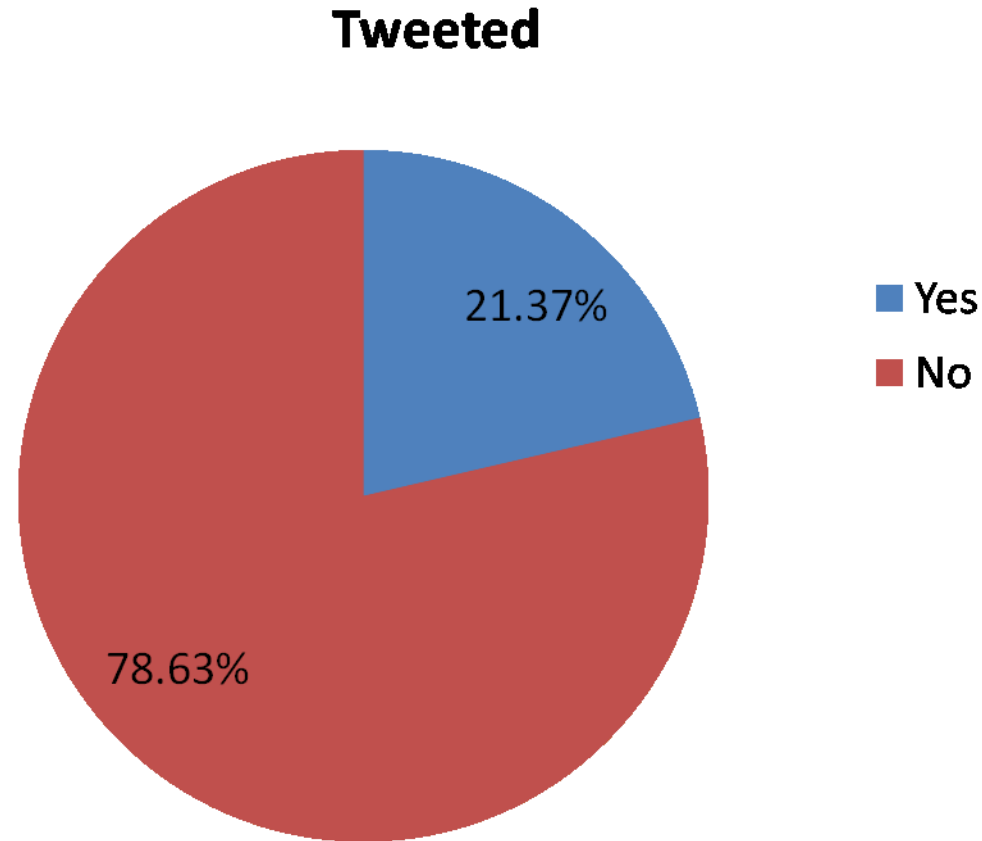
[Q15]. Have you visited any web sites specific to theme parks after your visit on [DATE]?

Twitter



[Q16a].Do you have a Twitter account? (Asked in 2010 only.)

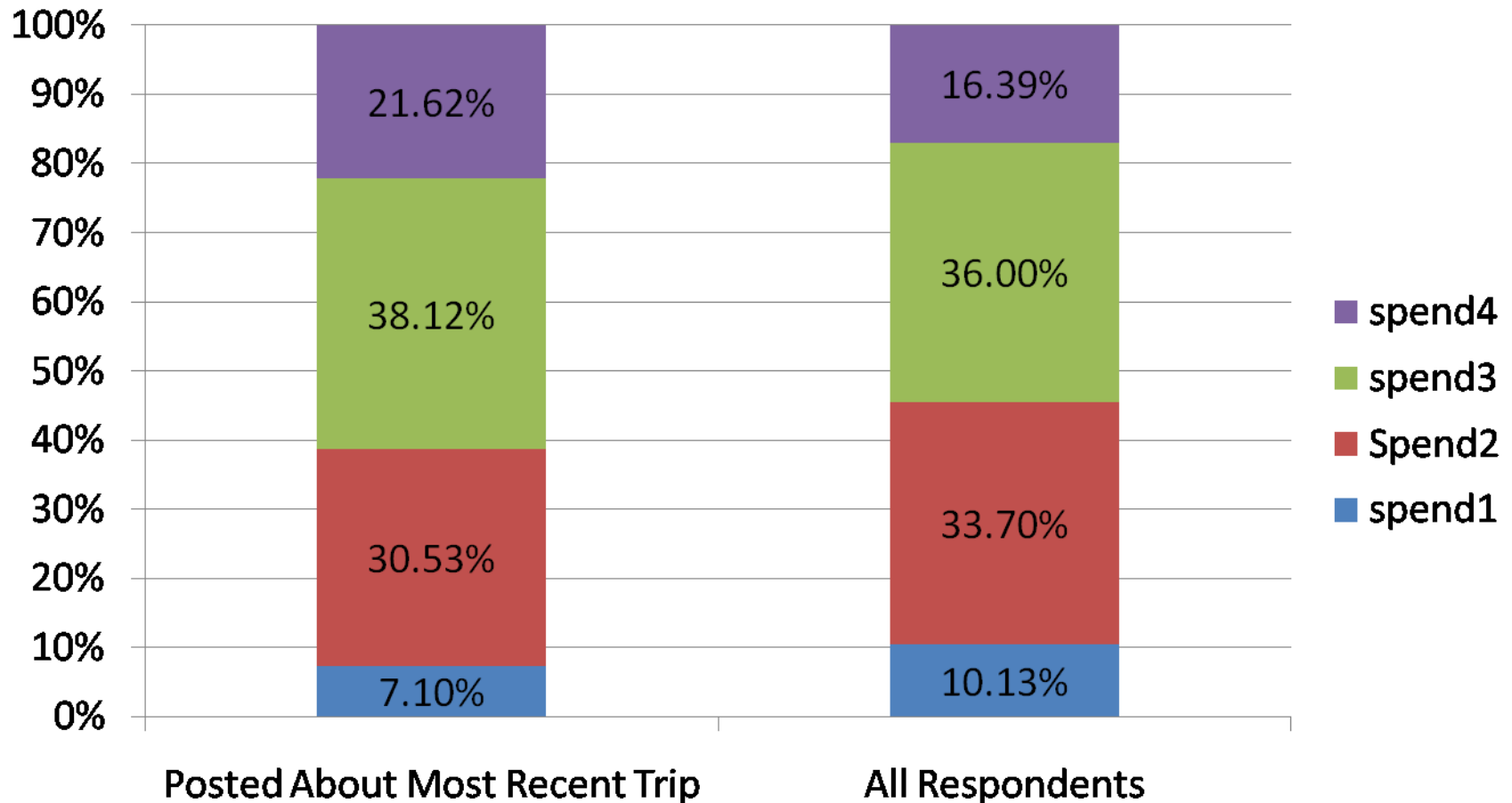
Percent of Tweeters that Tweeted about their most recent theme park experience



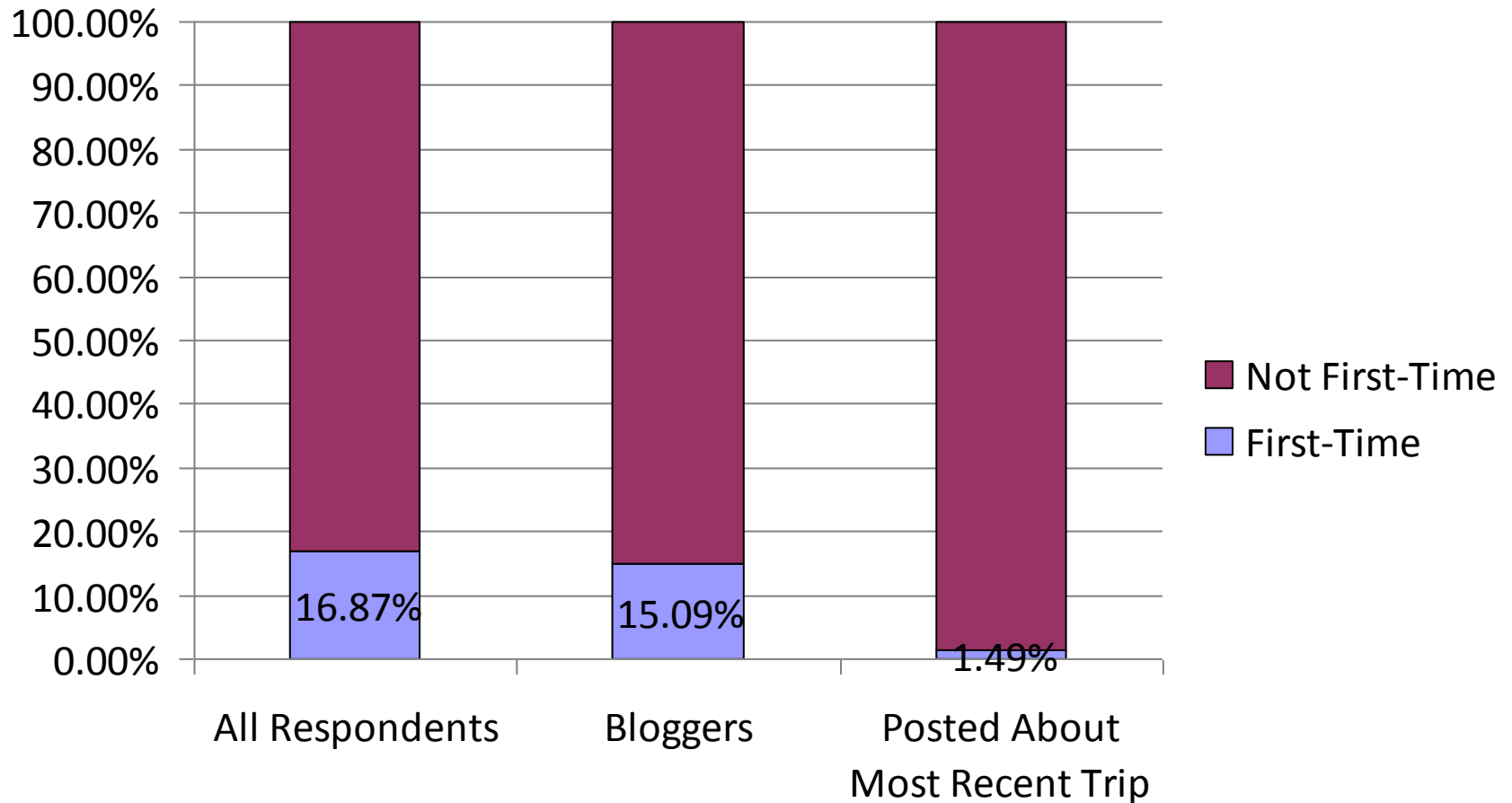
[Q16b].Did you Tweet about your most recent theme park experience?
Base = 248 Respondents who answered “Yes”, they have a Twitter account.

In-Park Spending Behavior

Those who posted about their most recent trip exhibit greater spending behavior than the average respondent.



New Audience Entrants 2010



While 16.87% of All Respondents are First-Time Visitors and 15.09% of Bloggers are First-Time Visitors, only 1.49% of those who Posted about their most Recent Trip are First-Time Visitors.

Conclusion

- Personal Internet Access among theme park visitors is higher than national averages, currently at 81%.
- Those engaged posters 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 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, Social Networking/Media is demonstrating rapid growth among theme park visitors and should continue to be tracked to determine at what point Social Networking/ Media can be determined a "Mass" media rather than Marketing tool.
- Traditional Media and OOH (Out of Home) should not be discarded as a means of reaching a new audience entrée's 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.

Thank You!

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