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**Brand Community and Engagement in the Family Tourism Industry in Central Florida:**

**A Comparison of Universal Orlando Resort and Walt Disney World Resort**

**Critiquing Marketing Communications**

**December 10, 2017**

This analysis will focus on marketing campaigns in the family leisure destination market. I was inspired by a recent television ad for the Universal Orlando Resort (https://www.youtube.com/watch?v=Xm_1j_ooG00) promoting the idea of a vacation for "kids who have grown up." This new ad campaign is a clear attempt by Universal to distinguish itself and set it apart from the Number 1 family vacation kingdom that just happens to be about 10 miles down the road.

As a background, I will be performing a sector analysis looking at the top vacation destinations for families. According to CNNtravel (http://www.cnn.com/travel/article/worlds-most-popular-theme-parks-2016/index.html), this list is dominated by Disney parks, with the Magic Kingdom in Walt Disney World holding the Number 1 spot as of 2015 (in fact, the top three most popular amusement parks by attendance are the Magic Kingdom in Walt Disney World; Disneyland in Anaheim, California; and Tokyo Disneyland in Japan). This study will consider the most popular destinations in Central Florida, which are the Walt Disney World Resort and Universal Orlando Resort. Attendance figures are compiled for each separate amusement park within the Disney and Universal resorts, but I will consider each entire resort as a whole. Walt Disney World markets itself as the Happiest Place on Earth, and its brand is known worldwide. Therefore, a comprehensive discussion of branding will be part of this analysis.

**Rationale**

The Walt Disney World Resort is the clear leader in the family leisure destination market. Because of this, their competitors have had to come up with creative ways to secure their own share of this market. I want to look at their closest competitor, Universal Orlando Resort, and

evaluate each resort's latest advertising campaign to try to determine how they are attempting to reach this market. The Universal Orlando Resort seems to have rebranded itself since its opening in 1990, with more of a focus on thrill rides rather than the "studio tour" aspect that they started with. I believe this is an effort to position themselves as the vacation destination for families with kids who are ready for more than princesses and fairy tales. I want to analyze Universal's latest ad campaign and attempt to determine what portion of the family leisure destination market they are attempting to reach. In addition, I will look at Disney's latest ad campaign to compare their strategy in this regard.

**History and Background**

The *amusement park* industry became the *theme park* industry with the opening of Walt Disney's Disneyland in Anaheim, California, on July 17, 1955. Until that time, amusement parks were "19th-century sylvan pleasure parks at the end of trolley lines and raucous midways in urban settings" (Adams, 1991, p.xiii). According to Pine and Gilmore, "Rather than creating another amusement park, Disney created the world's first *theme* parks, which immerse guests (never 'customers' or 'clients') in rides that not only entertain but involve them in an unfolding story. For every guest, cast members (never 'employees') stage a complete production of sights, sounds, tastes, aromas, and textures to create a unique experience" (Pine & Gilmore, 1999, pp.2–3).

In October 1971, The Walt Disney Company opened Walt Disney World near Orlando, Florida, in what had been undeveloped swampland. The company had purchased more than 25,000 acres of land in the mid-1960s in an attempt to ensure that its new theme park would not experience the crowding that surrounded Disneyland (Adams, 1991). Over the years, the resort

grew from its initial offering of one theme park and two hotels to four theme parks, multiple

water parks, more than 30,000 hotel rooms, and a shopping and entertainment district (Walt

Disney Parks and Resorts Fact Sheet, 2017). According to Adams (1991), "The year 1989 alone

saw the opening of the Disney–MGM Studios theme park, Pleasure Island (an evening

entertainment sector), Typhoon Lagoon (a water park), and the near completion of a massive

hotel/convention center comprising the Swan and Dolphin hotels, with almost 3,000 rooms.

These additions to Walt Disney World are considered by most observers to be a blatant attempt

to monopolize as much of the Florida tourist trade as possible" (p.159).

      The mention of 1989 by Adams is significant because "Disney scooped Universal Studios

Florida by opening the Disney–MGM Studios theme park ahead of schedule and a year before

Universal's June 1990 opening" (Adams, 1991, p.160). MCA [the motion picture company that

operated Universal Studios Hollywood at the time] built a new studio production facility in

Orlando in 1988 and "plans to build a second studio-tour theme park at the Florida facility...were

on the boards since 1980, but suffered a devastating blow when Disney rushed to complete its

Disney–MGM Studios Theme Park attraction in the Walt Disney World Resort complex in

1989" (Adams, 1991, pp.124–125). As a result, Universal Orlando was at a disadvantage before

it even opened. Fortunately, "by 1990 the movie studio tour became the hottest concept in the

theme park industry" (Adams, 1991, p.124), and there was a market for *both* resorts. In fact, even

though Walt Disney World "was the dominant firm and ruled the market with its own pricing

strategy in the early days of Central Florida at Orlando" (Wanhill, 2006, p.179), the entry of

Universal Studios, "with its considerable investment strength and strong imagescapes from its

films, enabled it to challenge the WDW [Walt Disney World] premium pricing strategy," leading

to "more collusive parallel pricing behaviour...in which the major players matched each other" (Wanhill, 2006, p.179).

However, although there was initially a strong market for both of these new studio-tour theme parks in Florida, according to Braun and Soskin (2002), "if parks offer similar experiences and are therefore substitutes, it is important for managers to understand guest perceptions and to differentiate their products" (p.221). As Braun and Soskin note, "Universal entered with a replicated set of market-proven attractions from its thriving southern California parent site" and "attacked two previously unexploited vulnerabilities" of Walt Disney World (2002, p.222). These vulnerabilities were Disney's primary appeal to families with younger children and its expansion "into a wide range of themes, including amusements and rides, water parks, a World's Fair, nightclubs and nature settings" (Braun & Soskin, 2002, p.222). Universal brought high-tech thrill rides and "more sophisticated attractions" that appealed to "the under thirty-five-year-old crowd," which was a market that Disney had not yet addressed. And unlike Disney's other competitors in the Central Florida region, Universal was "a financially rich rival" (Braun & Soskin, 2002, p.222) that could afford to expand its offerings and fight for its share of visitors.

**Research Plan**

Thus far, I have provided a detailed history of the theme park industry in Central Florida. I would now like to analyze each resort's standing in the family tourism industry and look at both resorts at two different periods—1990 and today—to compare their early focus and how they have evolved to continue to attract a share of this market. I have selected 1990 as a starting point because Disney opened its Disney–MGM Studios theme park on May 1, 1989, and Universal opened Universal Studios Florida on June 7, 1990. Looking at theming and strategy in

1990 provides a picture of the original focus for these parks. Comparing that period to today enables us to see what has changed in their focus and to analyze whether that change appeals to a different segment of the family tourism industry audience. This project is concerned with the following research question:

**How has branding engaged the target audiences for the Universal Orlando Resort and Walt Disney World Resort?**

Key marketing communications issues that will be addressed at this stage are brand strategy, engagement, and integrated marketing communications (IMC). Disney has a well-known brand, but how did it apply this brand recognition when it opened the Disney–MGM Studios park? How did Universal rely on *its* brand, based on the fact that it had been running a very successful "studio tour theme park" in California for decades before it expanded to Florida?

Regarding engagement, what has each company done to create experiences for audiences? Why do families keep coming back? Who is *not* engaged by these efforts?

Last, how have both companies used IMC to attract and retain audiences? I will look at each company's website and major social media platforms (Facebook and Twitter) to examine the consistency of the messages being distributed on each platform.

**Branding and Creating a Theme**

According to Gray (2010, p.311), "Branding is about surrounding a product with layers of symbolism in an attempt to give it a meaning both for those new to the product and, as value added, to those already owning the product (and, it is hoped, likely to be return customers)."

*Disney.* According to Wanhill, "The Disney brand gives the corporation substantial market power even though the technology of most amusement rides is available to everyone"

(2006, p.175). The Disney brand has a long history, beginning with the introduction of Mickey Mouse on November 18, 1928, and continuing with countless animated movies, consumer products, and vacation destinations. In addition, Disney fans form a strong brand community, which Muniz and O'Guinn note is "marked by a shared consciousness, rituals and traditions, and a sense of moral responsibility" (2001, p.412), and plays "a vital role in the brand's ultimate legacy" (p.412). Disney fans' sense of community and "consciousness of kind" is enhanced by participation in Facebook groups, conventions, and even special travel clubs (the Disney Vacation Club is a "vacation ownership program" that offers members "magical vacation memories to last a lifetime"; Disney Vacation Club, 2017). A quick Google search for "Walt Disney World fan sites" yields several pages of unofficial websites that actively discuss topics of interest to members of the brand community (https://www.google.com/search?source=hp&ei=wt8tWsuAFuSHggfc2KSYBw&q=walt+disney+world+fan+sites&oq=walt+disney+world+fan+sites&gs_l=psy-ab.3..0j0i22i30k1l3.1424.14556.0.14818.48.38.9.0.0.0.114.2936.35j3.38.0..2..0...1.1.64.psy-ab..1.46.2905.0..46j35i39k1j0i131k1j0i20i264k1j0i46k1j0i10k1j0i13k1j33i22i29i30k1j33i21k1j33i160k1.0.fO7-GERx_Gs).

Walt Disney himself understood the importance of branding when he created Disneyland. He knew that "a well-defined theme" was essential in staging an experience (Pine & Gilmore, 1999). In Disneyland, and later Walt Disney World, themed "lands" contain themed rides, themed characters, and even themed food. The brand is repeated at every level of interaction with the guest, further reinforcing the theme. According to Frochot and Batat (2013), when experiences engage all five senses, they are more memorable for consumers. Perhaps most importantly, however, as Pine and Gilmore note, "At its best, theming an experience means

scripting a story that would seem incomplete without guests' participation" (Pine & Gilmore, 1999, p.48). And the design of the Disney parks into various "lands" allows each guest to construct his own story and "project himself into the experience" (Frochot & Batat, 2013, p.28).

According to Adams, "Walt Disney World's appeal is a blend of the security of a lengthy vacation without the necessity for planning or daily decision making" (1991, p.147), and families continue to be attracted to Disney's "stroller-friendly environs and youth-targeted marketing campaign" (Braun & Soskin, 2002, p.233). In addition, Walt Disney World offers experiences that involve aspects pertaining to the four realms of entertainment, education, escapism, and esthetics, which Pine and Gilmore argue creates the richest experiences (Pine & Gilmore, 1999, pp.38–39). Further, some of these realms are passive and others involve active participation. While on a vacation, tourists will move from one realm to the others over several days, leading to high satisfaction with the trip if all realms are experienced.

*Universal.* The brand identity for Universal Orlando Resort has been less recognizable than that of Disney over the years. Where Walt Disney World has consistently based their attractions on characters from their own animated films, Universal has focused on "riding the movies" in general. In addition, when it opened in June 1990, several of the movie-themed rides at Universal Studios Orlando experienced technical difficulties and were frequently closed. Despite these problems, Universal has been able to attract "teenagers and Generation Y (young unmarrieds)" (Braun & Soskin, 2002, p.232). According to OrlandoVacation.com, "Rather than focus on preserving classic rides from opening day, as was Disney's policy, Universal chose to move further forward, replacing one attraction with another as movies came in and out of favor with the public." (In fact, the resort's website contains a section called "Retired Attractions," which discusses several rides that were removed to make way for new experiences

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Although frequently replacing existing rides with new ones had the effect of keeping the park

fresh and interesting, even for repeat visitors, it made it difficult for guests to understand what

the park was about. More confusion resulted when the resort expanded to include a second park,

Islands of Adventure. As noted by OrlandoVacation.com, "Advertising and marketing issues

kept the public from understanding what the new park was. Many thought that it was simply a

new expansion to the existing park. Others believed that it was simply a collection of thrill

rides." Again, an apparent identity crisis resulted in slower-than-anticipated growth for the

resort.

As of November 2017, Universal Orlando Resort consists of two theme parks; a new

water theme park; five onsite, themed hotels; and the Universal CityWalk entertainment district.

According to their website, "You're the star here and you'll disappear into one jaw-dropping

adventure after another." Harry Potter now has a home at the resort. Universal's Islands of

Adventure features The Wizarding World of Harry Potter – Hogsmeade, and Universal Studios

Florida includes The Wizarding World of Harry Potter – Diagon Alley. Worth noting here is the

fact that these are separate parks with separate admission tickets required, so if a guest wants to

experience all of the Harry Potter attractions, he or she must purchase a more expensive park-to-

park ticket that allows visiting both parks on the same day.

In 2017, Universal added an attraction featuring NBCUniversal personality Jimmy

Fallon, who hosts the network's popular late-night program, *The Tonight Show.* Known as "Race

Through New York," the attraction was promoted by Fallon on *The Tonight* Show when it

opened. The focus on providing new experiences for older kids and young adults seems to be

giving Universal Orlando Resort a stronger identity, and as Adams notes, "Long-term survival

for a theme park, once it has captured an audience, depends almost completely on its ability to generate repeat visits with regularity" (1991, p.112). Even Walt Disney himself told a newspaper interviewer in the early 1950s, "The park [Disneyland] will keep growing. The thing will get more beautiful year after year. And it will get better as I find out what the public likes" (Adams, 1991, p.94). According to Morrison (2013, p.70), a widely accepted principle of marketing is the "product life cycle," which is the idea that "every product goes through the four stages of introduction, growth, maturity and decline," and he indicates that this concept has been converted into the "destination life cycle concept." Expanding on this idea, Butler (1980) "described a tourism area life cycle (TALC) with seven stages consisting of exploration, involvement, development, consolidation, stagnation, decline, and rejuvenation." Universal Orlando Resort and Walt Disney World Resort both seem to be going through a period of rejuvenation after some stagnation, particularly with their studio parks.

**The Appeal of Experiences**

Disney is a master storyteller, and as Frochot and Batat note, "The idea behind storytelling is to reach the consumer through his emotions by using the strong emotional connections that stories provide. The aim is, through narrating stories, to elicit emotions … which should lead customers to be more receptive to the message conveyed" (Frochot & Batat, 2013, p.27). Strong stories create experiences that families want to share. As Pine and Gilmore (1999) note, "Over the past few decades, the number of entertainment options has exploded to encompass many, many new experiences" (p.2), and it is these *experiences* that appeal to potential visitors. According to Pine and Gilmore, "Most parents don't take their kids to Walt

Disney World just for the event itself but rather to make that shared experience part of everyday family conversations for months, and even years, afterward" (Pine & Gilmore, 1999, p.13).

According to Morrison, one of the challenges of destination branding is the fact that "tourism is not bought and consumed like physical products; tourism and destinations are experience goods....destinations must be experienced to determine their real quality" (Morrison, 2013, p.296). Papatheodorou agrees, saying, "Tourism may be regarded as an experience good, because the consumer cannot tell its quality and characteristics before its purchase" (2006, pp.5–6). Frochot and Batat (2013, p.v) add that "tourist products are sold for the sensations, feelings and psychological benefits they procure." Therefore, it can be difficult to attract new visitors to try these experiences. In the family travel market, research has shown that "the female head of household (mother) plays the key role" in family decision-making (Morrison, 2013, p.444). According to Morrison, "She makes the majority of the travel plans including researching all trip options. The female head of household therefore remains the primary person with whom the marketing needs to connect emotionally" (p.445).

**Engagement**

According to Frochot and Batat, the "consumption experience" consists of four major stages, as follows:

- Pre-consumption, which involves planning for and day-dreaming about the experience;

- Purchase, which involves choosing and paying for the experience;

- The core consumption experience, which involves the sensations, satisfaction or dissatisfaction, and transformation of the experience; and

- The remembered consumption experience and nostalgia, which involves re-living an

  experience when you discuss it with friends and show them your photos. (Frochot &

  Batat, 2013, p.34)

These stages are important parts of the engagement process, and it is important for the resort

to stay connected to the consumer during each stage. This is accomplished through the use of

official websites, official blogs, social media sites like Facebook and Twitter, email, and

even videos that the resorts post to YouTube. In addition, nostalgia is also created when fans

participate in fan websites, offer advice to others in the brand community who are planning a

trip, and spend time interacting with the resorts on social media after their trip.

An examination of Universal Orlando Resort's official social media sites indicates that

they have about 534,000 Twitter followers and almost 2.5 million Facebook followers. I signed

up for both of these sites as part of this project, and I typically receive Twitter notifications

hourly. These usually consist of park announcements, information about events, and reminders

of contests. On one recent day, all Twitter notifications were sent in Spanish! Universal does not

update their Facebook page quite as often.

Walt Disney World has almost 2.9 million followers on Twitter and almost 15.7 million

Facebook followers (I already followed them on both sites before this project began). They also

send frequent Twitter notifications about events at the parks.

Another way that both resorts engage with customers is through the traditional media

channels the parent companies own. For example, Disney owns the ABC television network and

often broadcasts its flagship morning program, *Good Morning America,* from Walt Disney

World when a major new attraction opens or for such celebrations as Mickey Mouse's birthday.

They also broadcast prime-time specials from the parks for holidays, and cross-promote many of

these events and programs on the cable channels they own. Likewise, Universal is part of the NBCUniversal family, which has its own popular morning show, *The Today Show,* that it uses to feature new park developments, and Jimmy Fallon hosted *The Tonight Show* from Universal Orlando Resort during the debut of the new attraction called "Race Through New York." Engaging audiences through traditional media often reaches those who do not tend to use social media, such as young children and the elderly.

In the parks, interactive ride queues engage guests as they wait to board the rides. These often involve video screens with games that guests can play, television screens showing video clips of company content or other onsite attractions, and general information about the attraction they are about to ride. In this way, the resorts keep patrons entertained while they wait, reducing potential boredom, and they take advantage of their "captive audience" to continue communicating with them.

**Integrated Marketing Communications**

Universal Orlando Resort and Walt Disney World Resort both use multiple marketing communications channels to engage with their guests and potential guests. Their official websites contain current information about park operating hours, attractions, and special events, and this information is also shared with their followers on various social media sites. In addition, guests can sign up to receive daily emails from the resorts, which often include special package deals for upcoming travel dates and other information that can make the recipient feel like an "insider."

In addition, guests often share their opinions about the resorts in the comments on the resorts' official social media sites, their websites, and unofficial "discussion boards" and fan

sites. According to Aronczyk and Powers (2010), "By communicating with others about the importance of the brand to their lives, *consumers become promotional intermediaries themselves,* working in the service of the brand yet without the financial remuneration that its owners enjoy" (p. 11; emphasis in original).

According to Morrison (2013), IMC for destinations includes not only the well-known elements of advertising, public relations, and digital marketing, but also merchandising, which is a type of marketing communication that guests can take home with them in the form of souvenirs. Theme park souvenirs like t-shirts, plush characters, and refrigerator magnets remind the visitor of his or her vacation experience long after the trip has ended. Ride photos and other official pictures that guests can purchase are also important components of IMC in this industry.

Morrison notes that in addition to the consistency provided by IMC, repeating the same message through multiple channels adds impact, better accommodates different consumer learning styles, and allows the components to support each other (Morrison, 2013, p.323).

**The Ad Campaigns**

Getting back to the TV commercial that inspired this project, I would now like to compare Universal's "One Thing to Say" advertisement (https://www.youtube.com/watch?v=Xm_1j_ooG00) with Disney's "That's the Power of Magic" advertisement (https://www.youtube.com/watch?v=OfaFfxXAKfg). Interestingly, there are actually a few different versions of both of these commercials, but I have chosen to focus on these two specifically because they are the first ones I saw (if you are curious, the others can be found on YouTube).

According to Gray, when evaluating an advertisement, "We must look at not only the ad but also the add — at what is added to the text by the promotions. After all, if someone is moved to watch a certain movie by a trailer, that trailer will need to have done more than insist that the film be watched; rather, it will need to have constructed a series of meanings, themes, and/or characters to which the audience responds" (Gray, 2010, pp.308–309). And in the case of the two TV commercials examined in this study, they are both carefully constructed to *add* meanings that speak to their intended audience. In the case of the Universal ad, notice how the first pair of parents are sitting in a "traditional girl's bedroom," with its pink furniture and delicate pink and white bedding. This scene calls to mind a little girl who has grown up surrounded by the images of princesses and fairy tales. One of the later scenes in the ad shows a girl who is about 10 or 11 dressed as a wizard from *Harry Potter* using a magic wand to engage with the attractions at Universal. The implication is clear.

In the Disney World ad, we follow a similarly aged young girl as she walks down Main Street in the Magic Kingdom. In the voiceover, we hear her reciting lyrics from "You Can Fly," one of the popular songs from *Peter Pan.* Interestingly, *Peter Pan* tells the story of a character who chooses to never grow up, living in Neverland as a child forever. Coincidence? Perhaps not. I believe that the master storytellers have strategically used the *Peter Pan* image to reinforce the message of this ad that Walt Disney World is for children of all ages. In fact, near the end of the ad, we see a gray-haired man laughing joyfully on a ride with what appears to be his adult daughter. Too old for Disney World? Not *this* family!

**Final Thoughts and Conclusion**

I began this project knowing that Disney is the leader in family tourism destinations. As my focus evolved to an examination of strategies for Disney's and Universal's studio parks, I was surprised to learn that Universal was actually the studio park with the more cohesive identity from 1990 to today. Although the movies they have featured have changed, their focus has remained primarily on "riding the movies." Universal has engaged in an active attempt between its early days and today to attract a slightly different audience than Disney's. Rather than attempting to compete with the "children of all ages" market, Universal is focusing on kids who have "grown up" and are ready for more action and adventure.

Disney's studio park never really found its identity, and its latest iteration seems to be just a different version of their Magic Kingdom park, featuring rides based on well-loved characters with well-loved stories. Perhaps the new name of this studio park will reflect its new focus away from the "movie studio concept." I think it is also important to note that Disney seems to be offering "more of the same" in its other parks as well, perhaps in an effort to appeal to the segment of the market that it is already strongest with. When Epcot opened in 1982, the famous Disney characters were nowhere to be found. Today, they make daily appearances in the World Showcase countries in which their stories originated (for example, Winnie the Pooh and friends greet visitors in the United Kingdom pavilion), and Epcot has changed the theming of an existing ride (Maelstrom, in the Norway pavilion) to focus on the popular fictional sisters from the *Frozen* animated movie.

However, the Walt Disney World Resort, with its four theme parks, two water parks, and almost 30 official resort hotels, continues to attract more guests (including repeat guests) than Universal's two theme parks, new water park, and five themed hotels, and shows a real talent for branding and storytelling that engages "children of all ages." In contrast to Universal's marketing

message that "kids grow up — so do vacations," Disney's new video reminds viewers that "the world tells you to grow up — here, you'll never have to."

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