

The purpose of this study is to provide a model of strategies employed in the theme park industry, which does not currently exist in academic research. This purpose is accomplished by synthesizing current academic knowledge on strategy from both a tourism perspective and a business perspective. This knowledge is then combined with conclusions from a content analysis of articles written about two of today's largest theme park companies in the USA. The model developed by this study provides a foundation for further academic research to analyze the life of the theme park sector or to transfer strategies from the theme park sector and apply them to other industries.

The theme park sector is different from traditional tourism outlets because it exists in a human-created, artificial environment, yet it is an increasingly competitive and attractive sector (Clavé, 2007; King, 1981; Mayer, 2002; Milman, 2010, Yildirim, 2011). The theme park sector represents a major component of the tourism industry in the USA (Liu, 2008). In 1985, more than 30 American amusement parks received more than one million visitors per year. By 2010, approximately 290 million people visited these parks, and by 2012, more than 400 amusement parks and related attractions operated in the USA (International Association of Amusement Parks and Attractions, 2015). Despite the growth of the amusement park industry, including an increased number of theme parks, research is lacking on the topic of specific strategies used by theme parks to attract customers.

Central Florida is now the world's unofficial "theme park capital", with dozens of competing parks and attractions (Braun et al., 1992). Of the top 25 amusement parks and theme parks worldwide, the highest concentration is in Florida, with seven parks (Rubin, 2014). Disney theme parks dominate the sector by virtue of size and diversity, although many others are now viable competitors. Success and attention caused the expansion of attractions already in the area and brought in new parks, resulting in the amusement-based tourism economy in Florida today (Braun et al., 1992; Milman and Dickson, 2014). Of the top 25 amusement parks and theme parks worldwide, Walt Disney World and Universal Orlando, both in Central Florida, are the top two competitors in the USA based on total guest attendance (Rubin, 2014). Walt Disney World's Magic Kingdom saw 18,588,000 visitors in 2013, and Islands of Adventure Park at Universal Orlando saw 8,141,000. For this reason and the example set by their competitive relationship, Walt Disney World and Universal Orlando are the primary focus of this study.

Competition and strategy

Competitiveness has no single academic definition. Porter (1980) notes that competition in the broader sense should be termed extended rivalry. Competition is dynamic and rests on innovation and the search for strategic differences (Porter, 1998). Competition helps companies strive strategically for higher-quality products and services for long-term profitability (Crouch and Ritchie, 1999). A destination is competitive if it can attract and satisfy potential tourists, and a wide range of tourism- and business-related factors determine competitiveness (Enright and Newton, 2004). No matter what the definition, competition exists between players in a region or industry and requires an advantage over competitors (Font et al., 2006; Gooroochurn and

Sugiyarto, 2005; Porter, 1980). Competition between service providers includes jockeying for position, for which companies use price, advertising and customer service to compete (Porter, 1980). Companies feel the effects of each other's moves and are prone to react to them, using a variety of methods to achieve their goal. Porter (2008, p. 25) elaborates on his "five competitive forces that shape strategy" to determine how competitive an industry is and in what specific areas. Porter's final concept, rivalry among existing competitors, is the most closely examined in this study.

Tourism companies put consumers first to compete as leaders in quality with radical innovations that strengthen the firm's strategic position (Poon, 1993). A theme park's unique set of resources and competencies create a sustained competitive advantage when others cannot imitate them (Haugland et al., 2011). According to Fuchs (2004), successful tourism destinations now have to consider customer satisfaction as the most important source of competitive advantage. Dissatisfaction can easily damage the competitiveness of a service provider (Buhalis, 2000). Competitiveness is a key element to study as the theme park sector continues to grow and change (Enright and Newton, 2004). In today's competitive business environment, winning does not just mean surviving; it means leading (Poon, 1993). The competitiveness of tourism destinations and attractions gained more focus in academic research addressing tourism and the theme park sector in recent years with increased focus on competition (Gooroochurn and Sugiyarto, 2005).

Research on competitiveness is often done in a vacuum, in which an industry is assessed without appropriate context (Enright and Newton, 2004). According to Gomezelj and Mihalič (2008), there is a strong need to identify and explore competitive advantages and disadvantages, and to analyze the actual competitive position of the players in an industry. Many of the structural approaches to competitiveness from the 1990s are obsolete in today's world (Løwendahl and Revang, 1998). According to Løwendahl and Revang (1998), researchers need to assess the applicability of existing theories and openly discuss their relevance and limits in a new light.

Strategy is the means to achieve a competitive advantage in any industry. Strategy is fluid and responds to changes in the rules of competition and competitors (Fleisher and Bensoussan, 2003). Porter (1996, 2008) views strategy as building defenses against competitive forces or finding a position in the industry where the forces are weakest. Grant (1991) argues that strategy is the match an organization makes between its internal resources and skills, and the opportunities and risks created by its external environment. Generally, strategy is a position a company consciously decides to take. Strategy depends critically on a subtle understanding of the industry of which it is a part and the competitors it faces (Porter, 1980). As mentioned previously, Porter (2008, pp. 26-33) defines five competitive forces that shape strategy; one of these forces is "rivalry among existing competitors", which includes ways a company may try to outdo another, by means of price discounting, new product introductions, service improvements or any other means. Rivalry is a primary consideration to understand specific strategies in the theme park sector.

Strategy in the theme park sector

Traditional tourism was standardized and rigid, requiring travel agencies and other intermediaries to find packages and information for consumers to buy and use (Poon, 1989, p. 91). Flexibility, niche marketing and diagonal integration characterize contemporary tourism, which create new possibilities for strategy building in tourism. The theme park sector itself underwent major structural changes over the past few decades that impact strategy as well. Braun and Soskin (1998) acknowledge substantial changes in industry structure and in the market environment led to an observable alteration of theme parks. "As the theme park sector continues to mature, so too will its strategies evolve" (Braun and Soskin, 1999, p. 442).

Based on a synthesis of strategies research from the past 35 years, a model was developed for this paper to understand better the complexity of strategy in the theme park sector. In the model, six separate and distinct strategies emerge (). For the sake of this study, it is understood that each strategy is exclusive of all others, per the definitions listed hereafter, although multiple strategies can and should be employed at the same time to achieve a competitive advantage. These strategies are the framework against which data collected from the media are compared to establish relevant strategies in the theme park sector.

The first strategy is value, meaning a company provides a product or service at a lower cost than its competitors. Porter (1980) captures this idea as an overall cost leadership strategy, when a company tries to be cheaper than others. Porter (1996) later uses this same theme in his variety-based positioning strategy, which requires a company to focus only on a subset of a customer's needs to fulfill that specific need better than its competitors can. This concept is also labeled the category or tangible resource management strategy or the distribution strategy, which sees price as the central element of success (Claver-Cortés et al., 2007).

The value strategy is common in tourism. Tourism providers between the 1960s and 1980s focused on price and selling cheap destinations (Font et al., 2006). Gilbert (1990) explores this value concept in his commodity areas theory or locations tourists view as being good deals. For leisure travelers, price is an important key element in the decision-making process (Buhalis, 2000). Braun and Milman (1994) allude to theme parks when they note that repeat travelers to Central Florida are more likely to try different leisure experiences on their return visits.

The second strategy is uniqueness, wherein a company provides something others do not, so customers will choose the unique product first. This is also known as differentiation and can be a purposive strategy a company uses to become unique in the industry (Poon, 1993; Porter, 1980, 1996; Prideaux, 2002). Gilbert's (1990) status areas theory complement Porter's ideas, suggesting that success can exist because of a unique product or service. Service organizations can achieve a competitive advantage with a unique product (Pine and Gilmore, 1999).

The third strategy is catering to a niche, wherein a company fills a specific existing need for a subset of people. Porter (1980) identifies this concept in his focus strategy, when a company picks one area to specialize in. Porter (1996) again restates this concept in his needs-based positioning strategy, stating that companies tailor to fit the needs of a specific subset of people. His ideas about access-based positioning also relate to the niche strategy, with a specific group of people based on geography or scale. Claver-Cortés et al. (2007) also develop a specialization and intangible resource management strategy that includes this idea, emphasizing segmentation for a competitive advantage.

Theme parks commonly catered to niches in the past. To attract more visitors, theme parks offer more options tailored to specific segments of their target market (McClung, 1991). For example, many modern theme parks are trying to cater to the young adult niche with thrill rides geared toward that group. Destination theme parks that specialize generally have a better chance of achieving their strategies (Buhalis, 2000).

The fourth strategy is innovation, marked by technological improvements. Poon (1989) suggests that sustained innovation exists to pique tourists' interest as a flexible specialization strategy. Industry innovation is critical for theme parks, including the use of new technology to customize products for consumers (Claver-Cortés et al., 2007; Fyall et al., 2008; Poon, 1989).

To attract repeat business, theme parks convince potential guests that previous visits are inferior to new experiences and improved parks, a notion theme parks often subscribe to (Braun and Soskin, 1999). In 2011, the construction of new rides and the renovation of existing rides was the largest capital investment by theme parks (Clavé, 2007; Yildirim, 2011). For profitable growth, companies strive for new sources of innovation and creativity (Chang et al., 2014; Prahalad and Ramaswamy, 2004).

The fifth strategy is variety, wherein a company provides as many options as possible to satisfy everyone. Poon (1989) describes this strategy as taking on cluster segments, when a company works to cater to every segment in a group with different needs. Flexibility is the main goal and is required in tourism to create competitive advantages (Fyall et al., 2008; Hutcheon, 2013; Kemperman et al., 2000; Milman, 2009; Poon, 1989). Theme parks supported the idea of variety for years with new parks, new sections and new themes that provide additional options. Braun and Milman (1994) agree that individuals want to visit a particular park to satisfy all members of their travel party. The transformation to greater variety is a key feature of the modern tourism market (Poon, 1993). In fact, Formica and Olsen (1998) say that the majority of the parks under construction are conceived as multi-purpose entertainment centers with options.

The final strategy is quality. Tourism and recreation consumers are increasingly more sophisticated and sensitive to quality (Augustyn and Ho, 1998; Kandampully, 2000; Milman, 2009). According to LeBoeuf (1987), businesses spend six times more money trying to get new customers with quality products and services. Contemporary tourists are more experienced, more quality-conscious and harder to please (Kandampully, 2000; Milman, 2009; Poon, 1993).

Clavé (2007) notes that one major factor of success among top theme parks is high-quality products and services. Consumers mold their expectations and perceptions of service based on reliability, honesty, trustworthiness, competence and courtesy (Fyall et al., 2008; Mayer, 2002; Parasuraman et al., 1990). Considering the importance of quality, tour operators must focus on improved service as a way to increase customer satisfaction and improve a company's performance (Font et al., 2006).

Together, these six strategies, or principles, form the conceptual framework against which this study assesses the strategies of two major theme park companies in the USA as they appear in the mass media. There is still no comprehensive source of information on the practical application of strategy in the theme park sector; this paper, therefore, aims to fill this gap.

Research methods

This study uses directed content analysis to identify and analyze strategies applied in the theme park sector as manifested in the mass media, similar to the work of Barringer et al. (2005), who quantitatively examined the content of the narratives of rapid-growth firms, including Disney. Content analysis gives researchers the ability to sift through large volumes of information systematically and derive useful data on a wide range of topics (Stepchenkova, 2012). Directed content analysis allows the use of prior research to form initial categories before sorting through texts. Directed content analysis is most useful when there is already knowledge and prior research on a topic, although incomplete (Hsieh and Shannon, 2005). The content analysis in this study was conducted by a single researcher and verified by a second person.

Academic research compiled for the literature review about theme parks, competition and strategy was reviewed for patterns in strategy theology to form six preliminary categories to be scrutinized further after content analysis of the collected mass media articles. As previously noted, the identified strategies were value, uniqueness, niche, innovation, variety and quality (Figure 1).

To find media sources, an initial search was conducted for relevant articles from newspapers, magazines and online publications produced in the USA. Sources include LexisNexis Academic, Academic Search Premier and NewsBank Full-Text Newspapers databases. LexisNexis Academic provides a range of newspapers and trade publications, and NewsBank provides access to more than 170 major US-based newspapers. Academic Search Premier provides additional sources, including magazines.

Each database was searched using the following four key terms: competition, strategy, Disney and Universal Studios. Results were screened for relevance based on their inclusion of all four key terms. At the conclusion of the search, 87 articles from 34 US-based sources were amassed, varying in circulation size and published between 1985 and 2013.

Each article was read, and sentences that suggested the use of a strategy were recorded. Although the intention was to leave each data point at a one-sentence maximum, occasionally, a second sentence was included for context and clarification. Each article was read twice to ensure the inclusion of all potential data points. Every source had the potential to provide multiple strategies, although sentences within each source that suggested the same strategy were only counted once, on their first appearance. In this way, several strategies could be recorded in any given source, but the same strategy could not be recorded more than once in each source.

One-word descriptions of each data point were identified. Any descriptions that closely matched the preliminary categories were noted as such. The remaining data that did not fit the preliminary categories were placed in a new category. This was done until every data point fit into an exclusive category. The new categories evolved as the research progressed, until the best one-word description was identified.

To identify the appropriate strategy for each data point, each article was read for an understanding of its overall theme, and then, specific sections that suggested a particular strategy were highlighted and narrowed down to the most applicable sentence. If a sentence was difficult to narrow down to only one strategy, the sentences around it were used for context to determine the best descriptor for the data point.

At the conclusion of the data screening, 225 data points were identified. In addition to the six strategies originally derived from the academic literature, two more themes were discovered from the data: currency and convenience. Currency refers to theme parks providing guests with experiences that are culturally relevant at the time and modern in the theme itself (e.g. creating a ride from a new movie). Convenience is demonstrated when a park creates a more accessible environment for a single visitor or an entire group. Both of these new strategies appeared frequently in the data. However, even with the new categories, the list is not exhaustive. These new concepts were identified because of repetition, which might not be obvious for other potential strategies. With the addition of these two new categories, eight strategies were identified in the theme park sector: value, uniqueness, niche, innovation, variety, quality, currency and convenience (Figure 2).

Analysis and discussion

Each data point was placed in a category fitting one of the identified strategies and then quantified for further analysis. After being recorded electronically in Microsoft Excel, the data were analyzed further through the use of available functions, such as pivot tables, to discover significant trends in frequency.

The analysis indicated variety and currency were the two most frequent strategies used in the theme park sector between 1985 and 2013 as described in newspapers and magazines. Variety existed in 19.56 per cent of the data and currency in 19.11 per cent of the data. The next most

common strategies were uniqueness (15.56 per cent) and innovation (13.33). Niche existed in 9.33 per cent of the data, and convenience and value both existed in 8.89 per cent. Surprisingly, quality was the least mentioned strategy, with only 5.33 per cent of all recorded data points.

Variety

As noted, the most frequent strategy was providing variety. This strategy was mentioned 44 times between 1987 and 2012, with nearly one-third of those mentions taking place in the year 1999 alone. Of the 34 data sources, 23 of them specifically mention variety. Variety appears early and consistently in the data. A 1988 Los Angeles Times article titled “A Rivalry of Titanic Proportions” notes that:

The big question is whether anyone, including MCA, can compete with the tourist wallop wielded by Disney World, which includes the Magic Kingdom, Epcot Center and a host of new attractions opening along with the studio tour, including Typhoon Lagoon, billed as the world’s largest water park, and Pleasure Island, a nighttime entertainment center.

Twenty-one years later, a 2010 article in The Tribune notes that:

When Universal Studios opened the second of its big attractions [...] it hoped that by jamming super-scary roller coasters, Jurassic Park, Spider-Man and Dr Seuss into one fun park, it would at last pose formidable competition to Walt Disney World.

The direct competition between Universal Studios and Walt Disney World is mentioned often in the variety category. At least a dozen statements directly compare the two parks in terms of variety. The number might double or triple if the sentences surrounding the data points were consistently included for further context. On the other hand, objective statements regarding variety show up in only a handful of data points. The Orlando Sentinel states “Size, though, will not matter to people who pay to get inside the attractions, because of the variety of activities inside the parks”.

Many allusions to variety align specifically with expansion projects. For example, in 1999, the New York Post notes that:

[...] linking the two parks is CityWalk, Universal’s answer to Downtown Disney and Pleasure Island, with restaurants, shops, movie theaters, bars and clubs, and the live venue at the largest-ever Hard Rock Cafe.

That same year, a Newsweek article notes, “Islands of Adventure includes a \$600 million deluxe hotel [...] and a CityWalk of restaurants and nightclubs”. Every expansion project is directly linked to the element of variety.

The data for this strategy were also unique because it manifested in the form of extensive lists. In several instances, variety stood out from the rest of the text because long lists denoted it. For example, in a 1999 article, the Houston Chronicle described the following:

The Disney World Resort encompasses four theme parks: the Magic Kingdom, Disney's Animal Kingdom, Epcot and MGM-Disney Studios; three water parks; the Disney Institute; Downtown Disney, a retail and entertainment district; 17 hotels, five golf courses, a racquet club; and two mini-golf complexes.

Previous academic research identified variety as a top strategy in the theme park sector because it allows a company to serve different theme park markets better. Although some sectors of tourism might attract select personality types, theme parks appeal to many personalities, all seeking something slightly different from their previous experience. Researchers textually support the existence of variety as a strategy in many instances (Braun and Milman, 1994; Formica and Olsen, 1998; Fyall et al., 2008; Hutcheon, 2013; Kemperman et al., 2000; Milman, 2009; Poon, 1989, 1993).

Currency

Currency exists in 19.11 per cent of the data, 43 times in 24 publications between 1987 and 2012. More than a fourth of those mentioned took place in 1990, when Walt Disney World and Universal Studios were opening or planning to open their rival movie studio theme parks.

The theme of Hollywood glamour and popular movies shows up repeatedly as a strategy. A 2002 Newsweek article, "The Battle for Orlando", states: "two of this year's box office smashes, 'Spider-Man' and 'Men in Black II' have Universal rides." In 2004, the Atlanta Journal-Constitution highlighted the opening of the new Shrek ride. In 1989, the Deseret News noted several E.T. ads were noticeable because "they are endorsed by a familiar face, one that kids of all ages fondly recognize".

In selecting a theme for future development, it makes sense for a theme park to choose elements familiar to the general public. By doing this, the theme park extends the experience off the big screen. Within the currency strategy, movies and characters spanned all genres and age groups. In this way, the variety and currency strategies align to make a heavier impact. In a 1990 article, the St. Louis Post-Dispatch notes the following:

It's shaping up as the kind of spectacular that only Hollywood could dream up and pull off: Jaws, E.T., King Kong and the Ghostbusters join forces against Indiana Jones, Roger Rabbit, Mary Poppins and the Ewoks.

Although researchers stress the importance of developing new concepts to keep theme park visitors interested, there is no established academic base that specifically addresses providing

new elements that are culturally relevant. It is unclear whether this is an overlooked concept in the academic literature or simply a common assumption.

Uniqueness

Uniqueness existed in 15.56 per cent of the data. This category showed up more consistently from year to year than all other identified strategies. It was absent in only seven years of data. In contrast, the two most common strategies, currency and variety, were absent in eight and nine years of data, respectively. Like variety, uniqueness appeared the most in 1999.

Of all the categories noted in this study, uniqueness refers the most to “Disney magic”, which itself is a unique concept. It is often noted that Disney capitalizes on uniqueness to keep visitors coming back year after year. Entertainment Weekly in 1990 notes: “like lots of the estimated 23 million visitors to Disney World each year, we arrived yearning for the warmth and spectacle that distinguish Walt Disney’s creations”. Disney is a strong contender in the uniqueness category, as far as the media assessment is concerned.

However, Universal is unique in many ways as well. Most notably, Universal does not adhere to the squeaky-clean image characteristic of the Disney theme parks. “Universal tries to differentiate itself from Disney-MGM by using ‘aggressive, in-your-face marketing’ that focuses on the ‘unique, one-of-a-kind properties that we offer’, one Marketing News article states. In particular, media articles reference Universal’s proclivity toward claiming Halloween as its holiday because it has an image different from Disney. In 2000, the Wall Street Journal notes: “The type of Halloween that’s popular in the parks today is off-limits to Disney”. Of the strategies identified in the academic literature, uniqueness is also the only one that deals with the holiday season. Both companies devote a great deal of effort to a single holiday. According to the popular media, Disney has a weak presence at Halloween, and Universal’s coverage of Christmas does not match Disney’s.

Many academic sources allude to being unique in business and in tourism. Being different is seen as a way to achieve a competitive advantage in tourism because tourists are increasingly looking for something to surprise them and capture their attention (Fyall et al., 2008; Hutcheon, 2013; Pine and Gilmore, 1999; Poon, 1993). Using the holidays as a marketing tool to enhance the parks’ uniqueness was an unexpected research outcome.

In the theme park sector, being unique has much to do with creating an image for the theme park itself. Rather than focusing primarily on generating unique rides, the mass media emphasizes more intangible ways in which the parks can create a sense of uniqueness.

Innovation

As a strategy, innovation is an ongoing process necessary for the survival of theme parks. It existed in 13.33 per cent of all data collected, or 30 of the 225 statements. A third of those

instances also took place in 1999, and another third took place after the year 2000. Generally speaking, this strategy showed up more often when new rides/attractions were opened at Walt Disney World or Universal Studios.

When it came to describing innovation in theme parks, the media often used sensationalism to capture the audience's attention. In 1990, Entertainment Weekly described a new ride at Universal Studios as follows: "inside a pitch-black theater, where millions of dollars' worth of special effects will soon explode". New attractions are sometimes accompanied by an explanation of their large price tags. In 1999, a Los Angeles Times article describes Universal Studios' new park, saying the following:

A weathered lighthouse marks the entry to Florida's newest theme park, but just beyond, a fiercer icon looms: the Hulk Coaster, which blasts riders from 0 to 40 mph in two seconds before turning them upside-down in a zero-gravity loop.

The data illustrating this strategy almost always describe some variation of "new" and puts a distasteful emphasis on the "old". In 2004, the Atlanta Journal-Constitution observed, "the Hulk doesn't do that old click-click-click uphill pull to get started like other coasters". In a 2000 article from The Times, the concept is well illustrated: "Bigger bangs, zappier zaps, loopier loops, and really real virtual reality" are now the ultimate goal for Central Florida's major theme parks, which are always looking for the next "wow". Innovation is time-sensitive because it requires the development and implementation of technology ahead of competitors.

Niche

Niche was not a dominant strategy in the mass media. The strategy only appears 21 times in the 225 statements collected, 9.33 per cent of the results. Like many other strategies, it exists most frequently in 1999, with four times as many results than during other years. Other than quality, providing for a niche was the least stratified; it did not appear in 13 years of the collected data. The niche being served by theme parks was almost always noted as teenagers and young adults.

Of all the strategies used by theme parks, providing for a niche seemed to favor one company over the other. The statement almost always referred to Universal Studios capturing the young adult market or conversely failing to capture the family market. In 1999, Newsweek notes: "the park is Universal's \$2.7 billion gamble that it can attract older thrill-seeking kids". That same year, The Charlotte Observer notes: "Universal Florida has scored high marks from teens and young adults over the past 10 years".

Most allusions to Walt Disney World are about its lack of appeal for teenagers and its capture of the family market. In 1990, Newsweek notes: "the sole chink in Disney's armor, some industry analysts says, is that its parks don't appeal strongly to teenagers". The same year the USA News & World Report notes: "the Disney-MGM park clearly emphasizes fun over fright and is

perhaps better suited for young children”. Nine years later, a source in The Denver Post perceived that “Disney owns early childhood”. Kids are a strength for Walt Disney World, a fact clearly noted in the popular media outlets observed in this study.

For the most part, media polarized the two companies. If one theme park lacked something, the competitor filled the gap. That is probably why the two companies seem to have successfully co-existed for so long – they are so different. More recently, however, the two parties fought over a niche market. In 2004, The Atlanta Journal-Constitution notes: “these days, Disney and Universal are locked in an escalating competition, and it’s all about pushing new, fantastically expensive and elaborate rides aimed at adrenaline junkies”.

Other than thrill-seekers and children, several other niche markets turn up periodically in the data. Most controversial was the offering of services for upper-class consumers. In 2003, the USA News & World Report notes: “then there’s the VIP tour, you just have to ask (and pay)”. Both Universal Studios and Walt Disney World now provide services for their more affluent clientele, a strategy that is more visible in the media in recent years.

Of all the strategies examined here, this one most closely related to quality, and the two were often paired together. For this reason, luxury was often found as a potential strategy. The reason it did not become a recognized category is because statements about the upper class nearly always referred to either a niche focus or a quality focus. Also, where other strategies highlighted the parks’ extreme renovation or development budgets, niche was only mentioned once.

Convenience

Convenience appeared 20 times in the mass media analyzed, or 8.89 per cent of all the statements collected. The most common year for convenience was in 1999, although overall, it appeared more frequently after the year 1999. Half of the statements collected were from 2000 to 2008, and that proportion jumped to 75 per cent if 1999 is included. Convenience was the only strategy of the eight that was most present in the twenty-first century.

Saving time was the primary convenience-related theme. It ranged from spending less time waiting in lines to being able to move between theme parks quickly. Transportation was the most common focus related to saving time. In 1999, the New York Times suggested: “[Universal Studio’s] compactness - the three sections are an easy walk from one another [...] – is an advantage for those with limited time”. In 1990, the USA News & World Report claimed:

Disney is making it highly attractive to stay on Disney property and visit only its attractions. Frequent shuttle service runs tourists from Disney’s 15 on-site hotels [...] to the Disney-MGM park, for instance.

Building quicker ways to get around town was a strategy for both theme parks consistently. One of the earliest mentions was in 1990 from the Fort Worth Star-Telegram noting the following:

[...] the Starway is a planned 900-foot-long, light-bedecked moving walkway designed to scoop up park visitors at the top of the mammoth Universal City hill and gently whisk them to the valley below.

There were few mentions of waiting in theme park lines, a common concern for theme parks. In 2000, a New York Times article notes the following:

[...] guests who stay at one of the two hotels on the ground of Universal Orlando [...] now step right in any time the parks are open - and not have to wait.

In the convenience category, short lines were mentioned only four times, all in the twenty-first century.

Value

Value did not show up as a primary concern for theme parks in the mass media. This could be because theme parks are normally a vacation destination, and therefore, people have already committed to spending large sums of money for the experience. Value appeared only 20 times out of the 225 collected statements, matching convenience in frequency. However, value was more stratified than convenience and niche strategies. Value was not evident until the 1990s.

Nearly every reference to value by either Walt Disney World or Universal Studios was in the form of discounted tickets or ticket packages. Most interesting were the references that indicated pricing models designed to make guests think they were getting more value. In 2013, Time Magazine notes: “the point of such a pricing structure is to make the multi-day passes look like bargains, relatively speaking, compared to the rip-off that is the single-day ticket”. According to the Los Angeles Times in 1990:

[...] tourists [...] tend to buy the passes because at \$102 apiece they’re a better deal than the \$31 it would cost to enter any one of the facility’s parks for just one day.

Both companies used this strategy to bring in more guests for longer periods of time.

Over the years, there was an observable trend of the parks offering longer packages to sustain their competitive advantages, thus, continuing the value strategy into the twenty-first century. In 1990, the USA News & World Report notes the following:

[...] by eliminating its popular \$80 three-day pass in favor of four- and five-day admission tickets that costs \$100 and \$117 respectively per adult, Disney recently made it more expensive for tourists to spend a day elsewhere.

Thirteen years later, the Orlando Sentinel notes: “Walt Disney World [...] will offer a seven-day package for the price of four as it tries to bring back tourists who have stayed away because of war worries”.

Providing value has been described for decades in business and tourism research (Buhalis, 2000; Porter, 1980), and it was the first strategy identified in this study. Value is also the only strategy with direct references to the Florida theme park sector in the academic literature (Braun and Milman, 1994).

Quality

The least mentioned strategy for the theme park sector was quality. It appeared only 12 times, or 5.33 per cent of the data collected. Quality existed in only six years of the mass media: 1989, 1990, 1996, 1999, 2003 and 2008. It appeared most frequently in 1990.

Most of the data in this category focused on providing quality lodging. Luxury is commonly mentioned to attract new clientele. In 1990, Entertainment Weekly highlighted a guest’s experiences to illustrate the quality of theme park accommodations:

But once we got there, the sheer beauty of it all – lovely combinations of the grand and the grandiose, the intimidating and the user-friendly, the overdone and the just right – was tremendously energizing.

Disney and Universal acknowledge directly that quality is important in their business. In 1989, the St. Petersburg Times notes: “history has proved the quality present is what the public wants”. Nearly 20 years later, the Orlando Sentinel notes: “both Universal and Disney insist that the immersion of customers into a good story, not the latest technology, must remain the foundation of their attractions”.

Whether or not the media acknowledges the importance of quality as frequently as other strategies, the academic community speaks frequently about its relevance (Augustyn and Ho, 1998; Fyall et al., 2008; Kandampully, 2000; LeBoeuf, 1987; Mayer, 2002; Parasuraman et al., 1990; Porter, 1980). According to Augustyn and Ho (1998), customers are becoming increasingly more sensitive to quality, so it stands to reason theme parks must consider quality an important strategy.

Conclusions

Despite the history of theme parks as important sources of entertainment in Western societies, there is a lack of research on the strategies used to attract new guest and entice repeat customers. Academic studies identified strategies used extensively in business and in tourism, but a rare few address theme parks or amusement parks directly. This study fills the gap with a

model of the specific strategies used in the theme park sector, analyzing strategies for further context and understanding.

A thorough review of the academic literature revealed six strategies in the theme park sector: value, uniqueness, niche, innovation, variety and quality. These strategies were defined in the context of theme parks to form mutually exclusive categories for further investigation through the use of directed content analysis. At the conclusion of the study, and based upon the content of the media reviews, two new categories were identified: currency and convenience. These two strategies fit well into a theme park's goal of providing enjoyable experiences, although these two strategies had not been described in the research literature to date. Based on the results of the content analysis, there are at least eight specific strategies applicable to the theme park sector today (Figure 3).

In order from most frequent to least frequent, the strategies are as follows: variety, currency, uniqueness, innovation, niche, convenience, value and quality. This rank order suggests that theme parks are likely more focused on providing variety by serving as many members of a visiting party as possible, all in one place. Quality was the least mentioned strategy, possibly because it is an assumed attribute for both Walt Disney World and Universal Studios through their established brands. Another possible explanation is that the articles simply did not emphasize quality because reporters either chose to cover details that were timelier and, therefore, more reportable or the publications reflected the values their customers prioritized. Together, these eight identified strategies form the foundation for this study's framework.

Research suggests that each strategy was recognized by the media since at least the late 1980s, although some appeared more frequently in the data over time than others. It is difficult to speculate the precise arrival, or disappearance, of each strategy due to the uneven spread of articles chronologically.

The most common strategy changes from year to year, often ending in a two-, three- or four-way tie. The two years that ended with a decisive leader in strategy were 1990 and 1999. In 1990, the strategy of currency spiked to double its average frequency in the data, primarily because of the development of movie theme parks by both Walt Disney World and Universal Studios. In 1999, variety appeared the most as each company developed new theme parks, water parks and shopping areas. That year also resulted in the primary concentration of the niche strategy. Universal Studios attempted to appeal to teenagers and young adults during that time, building bigger and faster thrill rides that were unmatched in the Orlando area. Occasional spikes in the data, like those suggested above, correlated with new developments from either company.

As theme parks continue to grow and diversify in the USA, and around the world, it is important for professionals in tourism to understand the sector's progression. The growth of the theme park sector in recent years suggests that a relevant understanding of the strategy is necessary. Knowing the strategies that theme parks used over the past few decades allows stakeholder organizations to examine the current and future needs of the sector. This research also has the

potential to help those stakeholders prepare and adapt to necessary changes in strategy that could happen in the future.

The model developed by this study can also be evaluated for use in other sectors of the tourism industry in need of revitalization. Considering the financial success and rapid expansion of the theme park sector, the strategies identified in this study could be useful to adapt and apply elsewhere in an attempt to bring success to other sectors of the tourism industry. With further research, this model can be used to understand the formula for theme park success and potentially bring measured success to other locations.

However, it is important to note several limitations present in this study. The application of directed content analysis means important strategies could have been overlooked. Repetition sorted out the most frequent strategies as discussed in the mass media, but there are other strategies that could be absent in this research. The focus on Walt Disney World and Universal Studios also leads to exclusion of strategies possibly unique in the tension of other competitors in the theme park industry and in the tourism industry, especially considering the two companies analyzed dominate the theme park industry. Competition among smaller theme parks or international theme parks could lead to a different result. Market conditions are a strong influencer in this study. The mass media is also subjective in its inclusion of information, dependent on the interests of its readers, which creates a narrow view of the competition happening between the theme parks.

This study synthesizes previous research on competition and strategy in business, tourism and the theme park sector in Florida, USA, in its literature review. It provides a detailed source of information that draws together multiple fields of interest in a new light. By combining previous knowledge and adding new research, this study provides a framework that can be used in future studies. New strategies were discovered that may apply specifically to the theme park sector, which are not well-understood to date.

Figure 1

Modern strategies in the theme park industry

[Figure omitted. See PDF]

Figure 2

Content analysis results by strategy

[Figure omitted. See PDF]

Figure 3

Revised modern strategies of the theme park industry

[Figure omitted. See PDF]

Word count: 6926

© Emerald Group Publishing Limited 2015

Cited by (8)

Documents with shared references (18799)

Small Business Marketing Strategies for the First 5 Years

Pai, Shiina.

Walden University. ProQuest Dissertations Publishing, 2017. 10617309.

The contribution of theme parks and attractions to the social and economic sustainability of destinations

Milman, Ady; Okumus, Fevzi; Dickson, Duncan.

Worldwide Hospitality and Tourism Themes; Bingley Vol. 2, Iss. 3, (2010): 338-345.

Success Strategies of Small Business Owners

Jakes, Lyndabelle Virgil.

Walden University. ProQuest Dissertations Publishing, 2018. 10751428.

A proposed instrument to measure the customer satisfaction of visitors to a theme park

Boshoff, Christo.

Management Dynamics; Stellenbosch Vol. 15, Iss. 3, (2006): 2-11.

Competitive Strategies of Microfinance Owners in Ghana

Asante, Eric Kojo.

Walden University. ProQuest Dissertations Publishing, 2017. 10283099.

Show more related items