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Walt Disney World 'Not Just a Theme Park'

EXECUTIVE SUMMARY

Through the early 90s, not enough Canadians were saying 'I'm going to Disney World.' Attendance was declining steadily. Part of the problem was certainly the weakening Canadian economy and loss of consumer confidence. But Canadians were travelling nonetheless – just not to Walt Disney World.

Kids loved the idea of going. The problem was parents. Qualitative research showed that parents believed Walt Disney World would be wonderful for kids, but stressful and expensive for them. It was a big theme park, not a holiday. A key insight showed us how to solve this dilemma.

A second issue was cost. Canadians thought Walt Disney World was very expensive, especially because of the weak Canadian dollar. We had to deal with this, without discounting the Disney brand.

Our strategy was two-fold. First, close the gap between the perception of Walt Disney World and the reality – using :30 television. Second, address the cost barrier – using page-dominant newspaper.

The campaign launched in October 95 with excellent results. Our objective had been just to halt the attendance decline – and we turned it around. Attendance posted a 35% increase in Year I, and the momentum continues into Year II. Quantitative research clearly linked this to the advertising, and there were no external factors to cause the turnaround. Our message was getting through. Canadians were going to Disney World again.

SITUATION ANALYSIS

Canadian attendance at Walt Disney World had declined since the early 90s. Traditionally, Canada had been the largest source of ex-US attendance. But by 1994, there were more British visitors crossing the Atlantic than there were Canadians crossing the border.

The Royal Bank Survey of Affluent Canadians showed that our target was still travelling. However, they were choosing cheaper 'sun' destinations like Mexico and Cuba. A growing number also intended to take the family holiday in Canada, partly because of the decline in the Canadian dollar. And headlines like 'crime targets tourists in Florida' didn't help.

Awareness of Walt Disney World was not the problem: it's 100% in Canada. Intention (at least, stated intention) was not the problem: most Canadian families say they'll take a trip to Walt Disney World some day. But they weren't going. To find out why, we ran qualitative research with kids in one room, and parents in another. Kids were enthusiastic. Parents anything but. They saw crowds, line ups, blazing sun, outrageously fast rides, junk food, and merchandise, merchandise, merchandise.

This wasn't a holiday. It was something you suffered for the kids! ¹

Existing advertising wasn't solving the problem, and it was not building brand equity. Walt Disney World

produced Canadian advertising in-house. For 30 seconds, Canadians saw rides, a parade, hotels, water parks, beaches, more rides, Mickey Mouse, Epcot, shopping and golf. Qualitative research showed that this was fueling their worst suspicions—you would come home tired, harried and poor.

STRATEGY AND EXECUTION

We had defined the problem. Now we had to find the solution. We ran qualitative work with 20 Canadian families at the park. (Finding these Canadians among 40,000 guests is a case study in itself!)

In line with earlier research, many parents had come to Walt Disney World to enjoy the kids having a great time. They were surprised that they were having as much fun as the kids were. But it was the kids that gave us our real insight. At home, parents are parents—often stressed. But at Walt Disney World, they transform. Moms play video games. Dads let loose on the rides. This was a side of their parents they rarely saw at home. Parents were amazed at this. The whole family was enjoying the same things. And in today's world, having fun together is precious. We had found the key:

Walt Disney World is the one place 'we are all the same inside'.

We now had to deal with price perception and exchange rate. Quantitative research showed that although many Canadians saw Walt Disney World as expensive, they also thought it was worth the price. Affordability was the issue. Some form of pricing action was needed, but we felt 'price off' would discount the value of the Walt Disney World brand.²

The solution was an 'at par' five day pass at a 1:1 exchange rate with the US dollar. This removed the 40% penalty Canadians paid when they crossed the border. It also showed that Disney was sensitive to the 'border barrier'. (Something most US companies don't seem to understand.) And the pass encouraged Canadians to stay five days, rather than the traditional three.

We ran the image message in television, and the 'at par' pass in newspapers. The two worked together. To get parents to commit to five days at Walt Disney World, we had to improve the brand image. Then the 'at par' offer helped close the deal.

Television:

'My Folks :30' ran from October 95 through to June 97 (with one adaptation to freshen the execution). The commercial shows a young boy and his parents having a great time at Walt Disney world. He realizes that parents and kids are all the same inside, and, as viewers, so do we.

Newspaper:

The 'at par' offer ran in travel sections of local papers from October 95 – January 96 and again from October 96 – January 97. The ad also offered a free Walt Disney World planning video, and was tied to the television by the line 'The one place we're all the same inside.' (see [Figure 1](#))

RESULTS

Our objective had been to stop the long-term decline, and we reversed it. Attendance jumped 35% in Year I, and is continuing to grow in 1997.³

Sales of the 'at par' five-day pass jumped dramatically, to more than five times the previous year's sales, and accounted for 16% of the attendance.

ISOLATING ADVERTISING AS THE VARIABLE

Tracking shows that much of the increased attendance can be traced to the advertising.

Motivation for the Trip

In 1996 we asked Canadians what made them decide to go to Walt Disney World. Our main selling idea was at the top of the list. Plus, 67% said the advertising 'made it look fun', completely reversing the 'tired, harried and poor' comments we had seen in earlier research.

TABLE 1: WHAT MOTIVATES A TRIP TO WALT DISNEY WORLD?

	% Agree (Top 2 box)
It is a place where my kids and I can enjoy the same things	80
The commercials made it look fun	67
The 'at par' five-day pass	50
The holiday planning video	45
A friend or family member told me about it	25

Source: Video Impact Study (Omnitel - 1996)

Tracking in March 1997 showed that 67% of our target said that 'Walt Disney World is the one place we are all the same inside'. This statement had only one source: the image advertising.

TABLE 2 : BRAND IMAGE COMMUNICATION

'...is the one place we are all the same inside'	% Agree (top 2 box)
Walt Disney World	67
Caribbean	18
Club Med	26
Cruise Lines	23
Cuba	15
Florida	24
Canada	36
Europe	18
Mexico	12
USA	21

Source: Tracking Study (March 1997 - Millward Brown)

Effectiveness of 'My Folks :30'

By Year II of the campaign, 81% of our sample remembered seeing 'My Folks :30'. Of those who saw it, 84% correctly identified Walt Disney World. This high recall was consistent with quantitative research that compared 'My Folks :30' to several US spots. The research was on three key measures, and on all three 'My Folks :30' did well.⁴

TABLE 3: MY FOLKS :30' EVALUATION

	'My Folks' % agree	US Spots % agree
I enjoyed watching the commercial	93	76
Better than most ads for holiday destinations	80	70
Made me want to take a holiday	61	64

The Effect of the 'At Par' Pass

A certain amount of attendance traced to the 'at par' offer: 16% based on actual sales. However, some of this 16% traces to the improved image—because parents would hardly have trekked to Walt Disney World, even 'at par', if they had negative expectations. If we credit half of the 16% to price alone, and half to improved image, then from the total turnaround of 35% we can attribute approximately 27% to the image campaign.

Overall Spending

We prefer not to release figures, but spending levels did not account for this turnaround. In terms of emphasis, media spending split 85/15 between image and 'at par', reflecting the importance of fixing the image.

External Forces

The economy; disposable income; consumer confidence; fear of crime: these all affect travel. Precise data for these can never be isolated entirely, but they would have been neutral overall in their effect on travel to Florida over the duration of the case.

CONCLUSION

This was a successful turnaround that solved the key problems by digging deeper.

It would have been easy to overlook the 'all the same inside' insight, and it was an ingenious idea to put kids in one focus group room and parents in another. For price/value, the 'at par' offer was an elegant way of giving a price discount without discounting the brand image.

Endnotes

1. Digging for Insight. Listening 'deeper' to the target.
2. Emotional + Rational. Balancing Image and Price/Value. See also Chrysler and Pontiac Sunfire, which managed to support price increases.
3. Counterpunching. A turnaround story. See Molson Canadian. Claritin, Outward Bound. Brand Image Communication
4. Oh Canada! Performance vs US creative.

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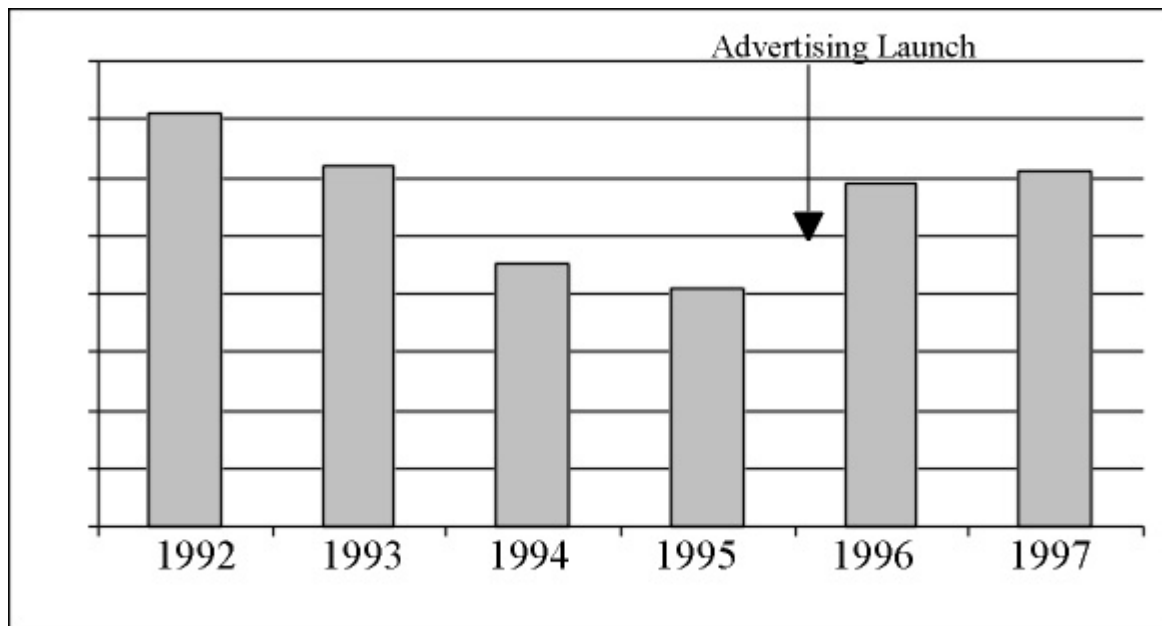


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NOTES & EXHIBITS

**FIGURE 1: CANADIAN WALT DISNEY WORLD ADVERTISING TRENDS
(1992-1997)**



Source: Walt Disney World
