

**Developing a new landscape for Customer care- Taking Disney as an example**



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## **Executive Summary**

Disney is a well-known company with a diverse business portfolio that includes animation production, theme parks, brand licensing, etc. This report will make a comprehensive and detailed analysis of the competitive environment of Disney (especially Shanghai Disney). PESTEL Analysis, Porter's Five Forces Analysis and SWOT Analysis have been applied in this report. Based on the philosophy of customer care, this report also provides with several practical recommendations for the better development of Disney.

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## **1.Introduction**

The Walt Disney Company, commonly known as Disney, is an American diversified multinational media conglomerate headquartered in Burbank, California. The Walt Disney Company is a diversified multinational media conglomerate headquartered in Burbank, California. All of Disney's businesses began with the Disney Brothers Cartoon Studio, which was originally founded by Walt Disney and Lloyd Disney on October 16, 1923. Disney subsequently became the nation's leading animated film company, and also became involved in live-action film and television production and theme parks. Taking IP as its core industrial chain, Disney is involved in many industries, including film and television entertainment, media networks, theme parks and resorts, related consumer products and so on. Disney has more than 3,000 licensees worldwide selling more than 100,000 products linked to Disney characters. In China, Disney has more than 600 licensees and partners, covering a wide range of categories such as clothing, toys, furniture, books, food and electronics. The upstream film production, the midstream and downstream theme parks, and consumer products form the typical IP operation model of Disney collectively. Innovation, quality, storytelling, community, decency and optimism constitute the core vision of Disney.

Among Disney's industries, theme parks are the most familiar to consumers. Shanghai Disneyland, the first Disney theme park in mainland China, is a theme park with a mix of Chinese and Disney designs that debuted on June 16, 2016, and it is also one of the greatest Sino-foreign cooperation projects in China's modern service industry.

## **2.Main Findings**

Following the previous general contextualization, this section will present a PESTEL analysis and SWOT analysis of Shanghai Disneyland.

### **2.1 PESTEL Analysis**

An analytical framework known as a PESTEL analysis is frequently used to assess the business environment in which a firm operates.

#### **2.1.1 Political Factors**

China's political environment remains sound since the founding of 1949. Chinese residents are able to live stable and high-standard life without severe social unrest. The political environment is the most fundamental factor in this analysis part. Only in a stable political environment, people are inclined to seek other pleasures in life.

Since the reform and opening-up in China in 1978, the Chinese government has been encouraging the development of tourism and Tourism has become one of the economic industries. Even in the process of the Covid-19 pandemic, China's government still encourages residents to make tourism consumptions.

#### **2.1.2 Economic Factors**

People's consumption in Disneyland can be seen as a high-level demand consumption. The purchase of tickets, hotels, food, products and etc. is made on the basis of good economic conditions. When the economy is doing well, customers feel hopeful about the future and are more likely to make other consumptions to enhance their quality of life. Accordingly, if the economy is struggling or declining, individuals will have a negative outlook on the future. Their consumption behaviors tend to be much more

rational.

China has experienced rapid economic growth in recent years. In addition, China has a sizable population and has long been seen as a prospective market for a range of businesses. The National Bureau of Statistics in China reports that in 2021, the indicator of new dynamics of China's economic development increased by 35.4% over the previous year (2022). China's gross national income (GNI) per capita has increased significantly over the past ten years as it has accelerated its ascent up the global value chain. China's per capita GNI doubled from 2012 to 2021, reaching 11,890 U.S. dollars. China improved 44 spots in the World Bank's rating of GNI per capita, moving up from number 112 in 2012 to number 68 in 2021. (Xinhua Net, 2022). Between 2013 and 2021, the Chinese economy will grow by 6.6% year on average, outpacing both the global average growth rate of 2.6% and the rate of 3.7% for developing economies (Xinhua Net, 2022). With a steady increase in disposable income, residents have extra money to be able to spend on entertainment.

Shanghai Disneyland is the only Disneyland in mainland China. Under good economic circumstances, if people are looking for a theme park to make tourism consumption in mainland China, Shanghai Disney may be their first choice, especially for those families with children.

### **2.1.3 Legal Factors**

China started to implement the three-child policy on May 31st, 2021. Compared with other theme parks, Disney has a longer history and enjoys a better reputation. Children's consumption is playing a predominant part in the total consumption of a family, especially in China. Therefore, the enactment of the three-child policy will be conducive for Shanghai Disney to generate revenue.

## **2.2 Porter's Five Forces Analysis**

Michael Porter proposed Porter's Five forces analysis model in the early 1980s, and it has had a significant global impact on the evolution of corporate strategy. By using the analysis of Porter's Five Forces analysis strategy, a corporate or organization can analyze the competitive environment of the consumer in an effective way. Porter's perspective holds that there are five fundamental competitive factors at play in an industry, in addition to the initial competitors. These five factors are: Bargaining Power of Suppliers; Bargaining Power of Buyers; Threat of New Entrants; Substitutes; Rivalry.

### **2.2.1 Bargaining Power of Suppliers**

The capacity of the supply side to raise the price of input factors and lower the quality of the unit value has a significant impact on the profitability and product competitiveness of the industry's current enterprises.

Why Disney can gain such a strong reputation within its target market? Because Disney is completely independent in this sector. That's to say, Disney is self-sufficient, not only in creating content but also in providing a wide range of diversified services. As an entertainment-based industry, Disney can be seen as a self-produced corporate. There is no pressure for it to bargain with suppliers. (Shen et al. 2021)

### **2.2.2 Bargaining Power of Buyers**

Customers have a greater impact on the profitability of existing businesses in the industry through pricing pressure than through their power to demand a higher standard of goods or services. Disney's main consumption includes tickets, hotels, and other derivative products such as dolls, etc. Once consumers entered Disney, they are already paying for Disney. The brand image of Disney is widely spread and consumers are willing to pay for Disney. The new "Lina Bell" series launched by Shanghai Disney is very popular in China and has even been in short supply for quite a long time. In this

term, buyers are not able to put a negative impact on the profitability of Disney.

Individual clients, organized purchasers, merchant middlemen, and other purchasing organizations can all be categorized as the primary tourists to Shanghai Disneyland. The most significant target market for Shanghai Disney is individual customers. Individual clients consume products frequently, have a strong preference for certain products, and may not give much thought to price. Additionally, since the economy has improved, consumers have more purchasing power and are eager to spend money at Disney and other entertainment companies.

Additionally, Disney mostly targets young and middle-aged individuals with middle- and high-income levels. The majority of these customers reside in large and medium-sized cities, where they have more steady incomes, greater purchasing power, a stronger sense of brand loyalty, spend more on in-home entertainment, and have higher service demand.

### **2.2.3 Rivalry**

The interests of most businesses in the sector are closely intertwined. Every enterprise's competitive strategy is an integral part of its overall strategy, its purpose is to make its own enterprise more advantageous than its rivals. As a result, there are bound to be conflicts and rivalries in the implementation process, and these conflicts and rivalries are what drive the competition among the businesses currently operating. Price, advertising, new product launches, after-sales service, and other factors are all common displays of competition between existing businesses.

The number of theme parks in China has steadily increased. By 2020, there will be 50 theme parks in China; In 2021, there were 64 theme parks in China; In 2022, the number of theme parks will reach 70, which reflects from the side that the number of theme parks in China is still in the stage of continuous growth. The rising of theme parks in

China mainland may cause a threat to Disney.

## **2.3 SWOT Analysis**

SWOT analysis is widely acclaimed for its simplicity and practicality. As a key part of the strategic management process, the SWOT analysis framework has been proposed by many scholars as an analytical tool to classify major environmental aspects that are both internal and external to the organization (Pickton and Wright, 1998). SWOT refers to “strength” “weakness” “opportunity” and “threat” respectively.

### **2.3.1 Strength**

#### **Mature Management of Employees**

Every visitor who enters Disney will find that every Disney employee has a happy smile on his or her face, which can make every tourist feel at ease when they’re enjoying themselves in Disney. This can all be attributed to Disney's sophisticated employee training system.

Disney is committed to developing high-quality and friendly employees. “If you can dream it, you can make it.” This is the philosophy of Disney. Walt Disney, the founder of Disney once said to his employees, “All of you are our future.” Just like what he said, Disney attaches great importance to its management over employees, and this behavior really makes sense. Disney pays great attention to employee satisfaction and meticulously divides employee training into three phases, namely “Tradition”, “Discovery Day” and “On-work training”. Every staff of Disney, no matter a regular employee or an intern, must undergo rigorous training before they can take a job. The tradition phase is about Disney's founding philosophy, history, current status, culture, etc. Every employee is required to know clearly the basic information about Disney. Only on this basis, the environment and atmosphere created in Disneyland can be meaningful. The second phase, Discovery Day, focuses on allowing new employees to go on field trips to various theme parks and participate in activities by themselves,

during which employees are able to further experience and understand the Disney culture. On-work Training, the third part, then focuses on skills training, emergency response, etc. Only after receiving theoretical teaching and practical training, can the new employees officially enter the workplace.

Apart from the mature training system, Disney also has a flexible and very well-developed employee incentive system. For example, Disney abolished incentives for attendance, believing that customers did not want to see sick employees, which would affect the company's overall image. Additionally, managers of different departments can set their own appraisal benchmarks based on the actual situation of their department. And the manager will use the employees' own opinions as a reference to choose different types of rewards for different employees, such as vacations, public performances, movie ticket rewards, etc. The "people-oriented" appraisal and incentive system will not only effectively reduce the turnover rate of the department, but also develop the loyalty of the employees.

A high-quality service team is the fundamental guarantee of Disney's success, and also the secret of Disney's ability to attract tourists. It can be said that Disney's high-quality service team is the foundation for Disney to establish a high-quality corporate culture.

### **Accurate Selection of Location (targeted at Shanghai Disney)**

Located in Shanghai, China, Disney has a great selection of its location. As the financial center of China, Shanghai has a developed economy. Along with the developed economy, Shanghai enjoys a high consumption level of residents and a great demand for leisure products. Famous for its cultural inclusiveness, Shanghai is capable of absorbing foreign cultures, all of which facilitate the development of Shanghai Disney.

Additionally, Shanghai has a mature rail transportation system- airplanes, trains, high-speed railways, subways and so on. A mature rail transportation system is conducive to attracting visitors from all around the world and China, offering them a range of choices

to visit Disney. Shanghai also recently built the Disney subway, enhancing accessibility for tourists.

### **In-depth Integration of Chinese Culture (targeted at Shanghai Disneyland)**

Although Disneyland is not a local theme park in China, Chinese residents have long been familiar with Disney because of its reputation. However, when settling in Shanghai, China, there is no denying that local residents are expecting their familiar elements. From this perspective, Shanghai Disney has done a good job. The seven theme parks of Shanghai Disneyland feature Mickey Avenue, Garden of Fancy, Adventure Island and Treasure Cove, all of which are set around classic Disney stories. Shanghai Disney makes a great integration between classic Disney stories and Chinese traditional culture, making tourists, especially Chinese local tourists to feel refreshed.

### **A Good Brand Image**

When mentioning Disneyland, people will consciously create a happy and joyful image in their minds. Disney has established a good brand image, which strengthens consumers' good impressions and cognition of Disneyland.

In the brand-building process of Disneyland, Disney company pays special attention to moving the audience through the storyline, establishing emotional contact with the audience, and cultivating customer brand loyalty through emotional consensus and cultural consensus. On the one hand, Disney also attaches significant importance to the construction of "word of mouth" in the management process. On the other hand, Disney pays special attention to detail and is responsible for consumers, which led to the further promotion of the Disney brand. In this process, a better brand image was established.

### **Mature System of Customer Care**

Service is a response to customers rather than a passive response. The vast majority of the crises faced by customers mean that employees only have about 60 seconds to solve this problem and turn it into a positive interaction. With the purpose of creating a great

experience, more attention should be paid to user details. The needs of customers should be kept in mind and prioritized until they are not only satisfied but also affected by this positive result in consciousness.

In addition to providing excellent services, Disney has also developed a crisis management system that can be applied in various emergencies. And it can be summarized as "learn" (L, E, A, R, N). The letter "L" represents "Listen", suggesting that the staff should recognize what customers saying and try to identify and figure out their problems as soon as possible. The letter "E" represents "Empathize", suggesting that the staff should put themselves in the customer's shoes. The letter "A" represents "Apologies", suggesting that the staff should take responsibility. If the emergency situation is caused by incorrect or improper behaviors of the staff in Disney, no matter if the fault is caused by you, you should take the responsibility of apologizing. The letter "R" represents "Resolve", suggesting that the staff should deal with the problem in a calm manner while taking immediate and proper action. Lastly, the letter "N" represents "Normalize", which means that all the staff should manage to restore the relationship with the customer to the state before the problem occurs.

Why can Disney provide customers with the perfect experience? The answer lies in the system of customer care of Disney. There is no denying that only the relevant theoretical knowledge is not enough, how to carry it out in daily work is the key to the problem eventually.

### **Show Special Care for Certain Groups of Customers**

In Disneyland, the visitor center is located at the park's main entrance and offers a number of tools for rent, including strollers, wheelchairs, and electric scooters. A typical amusement park rarely sees a regular stream of strollers, wheelchairs, and mobility scooters, in large part because they are cumbersome to operate and frequently encounter insurmountable hurdles. But in Disneyland, all rides, shops, and restrooms are completely accessible to these cars. Additionally, those with a disability certificate get

priority entrance and skip the line. These disadvantaged groups can also use Disney-provided buses and boats to travel between the hotels and the parks. The driver lowers the bus once it arrives. When the bus comes, the driver lowers the bus and the pedals to help people in the utility vehicle who are disabled board and exit the bus before letting other passengers board and exit.

In essence, Disney truly makes it possible for everyone, whether elderly, infant or disabled, to visit and experience Disney World.

### **2.3.2 Weakness**

#### **Insufficient Research on Customer Behavior (targeted at Shanghai Disney)**

As a foreign brand entering China, Disney only sees a promising market in China, which is rather one-sided. Disneyland lacks a thorough understanding of China's inhabitants and inadequate visitor behavior study, which inevitably results in certain "unconventional" issues. For example, the "bag rummage" incident.

It's widely acknowledged that bringing food into the park is recognized as a prohibited behavior in Disney. However, Chinese consumers may have a totally different idea. This strict rule ignores the reality of China and fails to comprehend the behavior of Chinese customers. The majority of Chinese people spend money visiting scenic areas primarily on the cost of the tickets, and when possible, they choose to save on other expenses like food and lodging. Chinese customers are also more likely to bring their own food to enjoy while walking and taking in the scenery, which saves both time and money. The high cost of food in tourist destinations may force the majority of visitors to flinch. Meanwhile, the ongoing public opinion will also damage Disney's corporate image to a certain extent.

Additionally, the price of tickets in Shanghai Disney is RMB 300-400 (According to Dazhongdianping, a well-known and common-used application in China). Compared

with other parks in the world, the price of tickets in Shanghai Disney may be considered low. However, in China, most people may treat it as a high-end consumption, which is not in line with the consumer behavior of Chinese people.

### **High Operating Costs**

Although Disney seems to be always crowded with tourists, it cost a lot to run the whole park. The majority of the revenues come from the notoriously pricey food served inside the park as well as merchandise from gift shops that are situated strategically around ride exits. Expensive entrance fees pay the majority of the expenditures associated with hosting visitors.

### **2.3.3 Opportunity**

#### **The Tourism Industry in China is Expected to Upgrade**

With the emergence of the leisure era in China, people are beginning to place a greater emphasis on enjoying life. Tourism, serves as one of the primary means of relaxation, needs to be upgraded for the purpose of meeting the diversified needs of tourists. Due to their entertainment and experience elements that satisfy people's requirements for leisure and relaxation, theme parks have a promising future as a new type of tourism.

Shanghai Disney, as a foreign brand entering China, has a more mature operational system. It has a strong brand influence and IP image, which is conducive to attracting large quantities of visitors of all ages. As China's tourism industry is in urgent need of upgrading and transformation, Disney, which is already mature, faces more opportunities, which is in line with the current trend and can meet the needs of tourists for leisure travel.

### **China's Three-child Policy**

The enactment of China's three-child policy will increase the country's population, which is a good opportunity for Disney to some extent. What we cannot deny is that children are playing an important role in Chinese families. Accordingly, their choices

exert great influence on how a family is entertained. The implementation of the three-child policy will undoubtedly increase the number of newborns, thus offering Shanghai Disney a great opportunity to develop.

#### **2.3.4 Threat**

##### **The Rising of Other Theme Parks**

At present, China has become the world's largest theme park market in terms of visitors, with nearly 3,000 theme parks, of which about 400 are of scale. According to Tianyan Research, there are 95,000 theme park-related enterprises in the state of being employed, existing, moving in or moving out. From the perspective of industry distribution, theme park-related enterprises are most distributed in the culture, sports and entertainment industries (36%). IP-themed parks such as Chimelong, Fantawild, Sunac Land and so on are also popular among tourists. These theme parks can also provide a wide range of amusement options and some of the local parks are much cheaper than Shanghai Disney.

What's more, China's local amusement parks can perfectly integrate the Chinese factor into the theme park. Take Song Cheng as an example. Song Cheng is located in Hangzhou City, Zhejiang Province, and it is the first large-scale man-made theme park in Hangzhou. The main building was constructed using the Song Book's "Building Method" and is based on the scroll "Qingming Shanghe Tu" by Northern Song Dynasty painter Zhang Zeduan, restoring the cityscape of the time. Additionally, "Song Cheng Qian Gu Qing" is one of the most famous shows in China, which serves to promote the Song Cheng attraction in turn.

### **3. Conclusion**

As a world-renowned enterprise, Disney's business map involves various industries, such as animation production, theme parks, brand licensing, etc. Among them, the theme park is the one we are most familiar with, for the reason that we can go to visit the theme park by ourselves and have a more "real" experience. Shanghai Disneyland is the only Disney theme park in mainland China. Thanks to its location, the management system of employees, diversified marketing strategies and so on, Shanghai Disneyland enjoys a high reputation and is welcomed by customers no matter at home or abroad. China is experiencing rapid economic growth and an industrial upgrade, all of which can provide Shanghai Disney with great opportunities for its development. However, Shanghai Disneyland also inevitably encounters some challenges and threats in its developing process under the background of other local theme parks also developing at a fast pace. With the use of PESTEL analysis, Porter's five forces analysis and SWOT analysis, this report aims to conduct a comprehensive analysis of the competitive landscape of Disney (especially Shanghai Disney) and to offer practical and feasible recommendations for Shanghai Disney under the guideline of customer care.

## **4. Recommendations**

The twenty-first century will either be the era of client sovereignty or the era of consumer revolt and uprising, according to Desatnick (1994). The acts of the service provider have some bearing on how well the service is supplied. This part will present some of the recommendations that may be applied by Shanghai Disney. All the related recommendations are put forward on the basis of the concept of customer care.

### **4.1 Chinese Traditional Holidays can be Used for Festival Marketing Activities.**

China is a country with lots of traditional holidays, such as the Lantern Festival, the Dragon Boat Festival, the Mid-autumn (Moon) Festival and so on. A great number of local theme parks in China like CHIMELONG are inclined to use traditional festivals to launch activities to draw tourists.

Shanghai Disney can combine its culture with traditional Chinese culture, such as holding a dragon boat race during the Dragon Boat Festival and a moon festival during the Mid-Autumn Festival. Additionally, Shanghai Disney can make use of traditional Chinese festivals to design more holiday marketing campaigns to attract more tourists, as well as to boost the consumption of Chinese consumers.

With the purpose of enhancing its reputation and fostering customer loyalty among Chinese local customers, it is high time that Disney should provide tourists with a more comprehensive way of understanding Chinese culture in the theme park. In addition, if visitors can experience diversified theme activities constantly, Disney will be able to attract an increasing number of newly come tourists as well as retain old tourists. Only in this case, Disney will be able to draw in more returning tourists, which is of high

significance for Disney itself to build up its reputation and establish brand loyalty in and outside of the industry.

#### **4.2 Establishing a Remote Workforce is an Essential in the Post-epidemic Era.**

As mentioned above, Disney has already developed a very mature management and training system for employees. Against the backdrop of COVID-19 sweeping the world in 2020-2022, an increasing number of companies begin to make “work-from-home” a brand-new type of work. Although China has now significantly relaxed restrictions on COVID-19, “work-from-home” or “remote working” has become a daily for workers to some extent. More than ever, flexibility may be used to draw in and keep remote workers who need to juggle job commitments with personal obligations or family obligations. Under this circumstance, establishing a brand-new remote workforce seems to be essential for all corporates. There is no exception for Disney.

To successfully implement more remote-working capabilities, such as videoconferencing-enabled quality control and interactive self-training platforms, businesses will need to modify their hiring, onboarding, and training procedures. Supervisors need to guide in a remote environment and maintain an organizational culture to keep employees engaged through virtual team activities and competition.

#### **4.3 Adopt Innovative Product Strategy and Promotion Strategy.**

Companies that can enjoy enduring success must have their core values (J.C. and J.I.,1999) Walt Disney, the founder of Disney once said, “Disneyland will never be finished. As long as there is imagination in this world, it will continue to grow and develop.” This can be regarded as the company vision of Disneyland. As the company vision outlines the pathway a corporate or an organization intends to take for advancement, Disney is expected to continue its way in innovation.

#### 4.3.1 Product Strategy

Merch has always been a key part of contributing to the revenue of Disneyland. Disney can continue to develop products with Chinese licensees that have a relationship with the local Chinese culture and gradually create a greater resonance with consumers. “Duffy and Friends”, a very popular series of Disneyland, attract thousands of consumers. ShellieMay, StellaLou, CookieAnn and so on have become one of the most popular products in the store of Disneyland. LinaBell, the most popular character in China now, is the new character created by Shanghai Disney in the year 2021. In 2022, Shanghai Disney cooperated with Hong Kong Disney to create a "Lina Bell Hong Kong trip" theme marketing activity, making “LinaBell” become more popular. Shanghai Disney should invest more in the creation of product development to create a more complete storyline behind the product. Only in this way can the products help to generate much more revenue for Shanghai Disney.

#### 4.3.2 Promotion Strategy

Shanghai Disney can adopt diversified promotion channels for marketing. In addition to traditional advertising methods such as TV and radio, Disney can also place advertisements on apps such as Weibo, Xiaohongshu, Instagram, Facebook and so on to integrate the advantages of both traditional media and new media, as well as carry out joint brand activities. Making use of celebrity effects is another way for promotion.

Cooperating with influential KOLs(Key Opinion Leaders) such as celebrities and Internet celebrities. KOL marketing is incredibly effective in China. The influencers interact with their audience by establishing a rapport and becoming relevant. Foreign businesses should consider investing in this potential because they have the power to start trends. According to a poll completed at the end of 2018, 49% of Chinese consumers rely on KOL recommendations when making purchases. For Millennials and

members of Generation Z, the figures are considerably higher. Overall, 89% of firms claim that the ROI they receive from KOL marketing is on par with or even superior to that of other marketing avenues. (brand.house, 2020)

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