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Disney Takes on Mainland China

Megan Pepi

Abstract

Since 2005, Disney has tried to establish brand loyalty, or choosing to buy goods or services from one particular brand over competing brands, in mainland Chinese consumers through its Hong Kong Disneyland. Studies have shown that Disney has failed in achieving this goal, as park guests tend to not make repeat visits to the park and do not show any affinity to Disney's characters and stories. Disney is going to retry achieving this goal through Shanghai Disney Resort, which is a theme park that will open in 2016. Facing the failures to achieve its goal through Hong Kong Disneyland, as well as the challenges of appealing to unique Chinese cultural preferences and working with a restrictive government system, will Disney be able to authentically represent its brand identity and establish brand loyalty in mainland Chinese consumers through its new theme park? After making observations at the park to see if the "Disney brand" is truly present, as well as conducting interviews with park guests; "cast members," or employees of the park; and "Imagineers," or the designers of the park's attractions, a case study that assesses Disney's ability to achieve its goal will be produced.

Introduction

Ever since China has seen spectacular economic growth and a rapid increase in the amount of disposable income, or income after taxes and basic necessities have been paid for, that Chinese citizens have, many Western businesses have expanded into Chinese markets. Even though there are great opportunities for these firms to make more money by extending their products and services into Chinese markets, Western firms face a multitude of challenges that make it difficult for them to attract consumers in the new market. It is essential for firms to have an in-depth awareness and knowledge of the “economic, political, and sociocultural” (Marshall 73) environment in China, so that they can adapt their products or services and promotion of these products or services to meet the needs of a markedly different culture (Beamish 1).

Last semester, I took a course that focused on understanding the unique elements of Chinese culture and politics that differ vastly from Western cultural and political elements. In addition, Chinese economic growth and the factors that have contributed to this stunning growth were also studied.

Case studies about different Western businesses’ successes and failures in Chinese markets were also presented to the class. For example, we learned about how Kraft originally utilized a “straight extension strategy,” which means that the firm “offered the same product that they sell in domestic markets as they would in foreign markets,” (Marshall 91) when they started to sell Oreos in the Chinese market. This strategy was unsuccessful, because Kraft failed to adapt to Chinese consumers’ dessert preferences, which include treats that are not extremely sweet. Western consumers may have a high tolerance for sugary snacks, but that does not mean that Chinese consumers will share the same preference. Kraft realized its mistake, so it decided to

adopt a “product adaptation strategy,” in which it “offered a similar but modified product” (Marshall 91) to Chinese consumers.

These case studies piqued my interest. Particularly, I became interested in how these firms are able to adapt their products and services to foreign environments without compromising their brand identities, or “a name, term, symbol, or any other unique element” that “identifies a firm’s product(s) and sets it apart from the competition” (Marshall 255). After all, “successful” companies create brands that “‘bond’ with their customers,” so that these customers feel as if they will have a long lasting relationship, or brand loyalty, with the brand (Marshall 257).

According to marketing professionals who are members of the American Marketing Association, brand loyalty exists in a consumer if he or she makes “biased,” or intentional, and repeat “purchases” of a particular firm’s goods or services “over time,” as opposed to the goods and services of “one or more alternative brands,” through a “psychological (evaluative, decision-making) process” (Jacoby 2).

One brand that is particularly successful in creating a unique brand identity and establishing brand loyalty among consumers is Disney. In Western societies, solely hearing the word “Disney” evokes emotions around fun and carefree lifestyles,” and being exposed to the brand induces consumers to purchase Disney’s products not just once but over the course of their lives (Marshall 255).

Disney first entered the Chinese theme park market in 2005 with Hong Kong Disneyland. Disney’s main goal with Hong Kong Disneyland Resort was to provide its target market, mainland Chinese consumers, a genuine “Disney” experience at its park, to “familiarize

themselves with the Disney brand,” and to encourage this target market to establish a loyal relationship with the Disney brand (Fung 200). Even though mainland Chinese visitors have enjoyed their trips to the Disney theme parks in Asia and have “felt compelled to visit the parks,” opinions and commentary from mainland Chinese visitors suggest that Disney has ultimately failed in achieving the aforementioned goals, because the visitors’ “passions for the Disney brand is low” (Fung 201). This shows that mainland Chinese guests view Disney’s theme parks as “just another entertainment spot, like shopping malls” (Fung 202). A “Shanghai Disney Resort marketing developer” even admits that theme park guests from mainland China “have little familiarity or affinity with the stories and values associated with Disney characters” (Makinen 2).

Disney is going to try to make up for its failures in Hong Kong and achieve its goal of brand loyalty among Chinese consumers with the opening of Shanghai Disney Resort in 2016. This will be Disney’s third theme park that is located in Asia and its first in mainland China.

As previously mentioned in the example with Oreo, Disney will probably not be successful in attracting guests from mainland China to Shanghai Disney Resort if it copies exactly every feature and offering at its theme parks in Western countries, since these features might not appeal to Chinese cultural differences. For example, in Hong Kong Disneyland, gift shops do not sell “Peter Pan hats,” unlike Disney theme parks in Western countries, even though “character hats are an iconic symbol” of the Disney theme park brand and experience (Tang 1). As a punishment in ancient Chinese culture, those who committed adultery were required to wear green hats (Tang 1). Will Disney be able to appeal to Chinese cultural differences while putting enough of its brand identity inside of Shanghai Disney Resort?

The People's Republic of China's (PRC) political environment, culture, and policies will also make it challenging for Disney to achieve its goal of brand loyalty through Shanghai Disney Resort. The "mainland Chinese's contact with foreign, especially American, culture is restricted by the PRC because of media control..." (Fung 200). This environment differs from "Hong Kong's government system," which has placed and still places "very few restrictions" on its citizens (Fung 200). This poses a challenge to Disney in two ways. First, Disney seeks to instill brand loyalty in "children." Disney hopes that as these children age, they will continue to consume Disney products and services, because they will experience pleasant feelings of nostalgia when the brand is brought to their attention (Fung 199). In order to sustain and grow its "fan-base" for the long term, Disney hopes that these target consumers will pass brand loyalty onto their descendants (Fung 199). Since the Chinese government has restricted forms of entertainment, particularly those offered by Disney, many people from mainland China have little familiarity with Disney's stories and characters; thus, they are unable to pass a love of the Disney brand to their children. State-owned firms, such as "Shijinshan Entertainment Park," have even "pirated" Disney's characters and stories "without Disney's permission," (Fung 200) so why should consumers visit Shanghai Disney Resort over the state-owned theme park with which they are already familiar? Secondly, "Shanghai Shendi Group," which is a state-owned theme park company, will have "57%" ownership in Shanghai Disney Resort, while Disney will only have "43%" ownership. In other words, the state-owned theme park company will have the majority of the control over the new park's offerings, such as attractions and merchandise, as well as any future changes and expansions that are made to the park (Shanghai Disney Resort 1). Noting that the Chinese government restricts its citizens' exposure to Western culture and media,

it will be difficult for Disney to give its guests “an authentic Disney experience” (Maniken 1) at Shanghai Disney Resort.

Facing the challenges of maintaining its brand image while appealing to cultural differences and working with a restrictive Chinese state-owned enterprise, will Disney be able to authentically represent its brand identity and successfully instill brand loyalty among mainland Chinese consumers through its new Shanghai Disney Resort?

Background and Related Work

“Localizing a Global Amusement Park: Hong Kong Disneyland.”

Micky Lee and Anthony Fung conducted a study in which they visited Hong Kong Disneyland to conclude whether or not Disney was truly successful in igniting a passion for the Disney brand inside of mainland Chinese consumers.

First, they assessed how much of the “authentic” Disney brand was present inside of the park by experiencing the park’s attractions themselves and staying at Disney hotels (Fung 200). They compared these experiences and observations to “feelings and attitudes” about the Disney brand that resulted from watching Disney movies in the past and visiting Disney theme parks in Western countries (Fung 200). Based on their observations, they concluded that the “genuine” Disney brand was heavily present inside of the park, since their experiences at the park’s attractions were very similar to those that they had experienced at other Disney parks (Fung 204).

In addition, Fung and Lee interviewed guests from mainland China, asking them if they had enjoyed certain park attractions and why they did or did not. For example, a mainland Chinese guest was asked about his reactions to an acrobatic show that told the story of Disney’s

“The Lion King” in which he gave this response: “I don't understand [the plot and story]. It is a game [and] a show with cool special effects. It doesn't matter. But I feel good about it” (Fung 202). Mainland Chinese guests’ reactions to many different attractions seemed to elicit the same results, which included overall contentment with the attractions but only because these attractions’ “features allowed [mainland Chinese] guests to experience out-of-the-ordinary events” that they would not experience outside of Disney theme parks (Fung 203). Coupled with the fact that these guests do not make repeat visits to Hong Kong Disneyland, these reactions to theme park attractions led Fung and Lee to conclude that Disney had ultimately failed in instilling brand loyalty among mainland Chinese guests through Hong Kong Disneyland.

Some important elements that should have been considered in the assessment of the Disney brand at Hong Kong Disneyland and the measurement of brand loyalty, however, had been excluded from this observational study. Disney parks are known for their “unique ‘Disney’ hospitality culture,” which is exhibited through its cast members, or employees (Brannen 610), so the presence of the brand could have been measured through observations based on the interactions that Fung and Lee had with cast members. Also, since Shanghai Disney Resort has not yet opened, there has not been a study conducted that measures the presence of the Disney brand identity and the loyalty to Disney that mainland Chinese consumers have or have not developed based on their experiences at the theme park.

North American firms in East Asia

Paul Beamish and A.E. Safarian created a compilation of case studies that describe Western companies’ experiences with entering into Chinese markets. Before they delve into these case studies, the authors briefly outline the decisions and strategies firms must create and

implement in order to allow their brands that succeed in Western countries to also succeed in Chinese markets. Such strategies include choosing to differentiate their products and services to appeal to cultural preferences in order to capture as much market share as they are able to and deciding on how to advertise their product or service to best capture the attention of a different market (Beamish 3-4). Included in this section are the challenges that Western firms often face when integrating their businesses into Chinese markets, such as “vastly different cultural” preferences and elements, as well as strict business regulations imposed by the government (Beamish 7). Seven businesses, all of which are a part of the telecommunications or engineering industries, are analyzed and deemed successful or unsuccessful in integrating into Chinese markets. Their strategies regarding how to garner the most business from Chinese consumers were reported, as well as how they dealt with the aforementioned challenges.

This source is very informational, but it is outdated. It was written and published in 1999, so any Western businesses that have entered the Chinese market since that year have not been included. Also, since it has been over a decade since these businesses have been analyzed, new challenges that Western firms face when entering China, new government policies, and new discoveries about Chinese cultural preferences could have been made. Finally, the only industries that are included in this series of case studies are telecommunications and engineering.

Entertainment and theme park companies from Western countries have yet to be analyzed, and there are currently fifty-nine of these firms building theme parks in mainland China today (Maniken). It is important to analyze different industries, since businesses of different industries will have different experiences and strategies, as well as face different challenges, when they enter Chinese markets.

Methods

In order to answer this question and to provide the information that was left out of the aforementioned observational study and series of case studies, it would be necessary to visit the new park in Shanghai. I would organize my research into four categories, which include making observations at Shanghai Disney Resort, interviewing mainland Chinese visitors, interviewing “cast members,” or park employees (Brannen 609), and interviewing members of Shanghai Disney Resort's Imagineering team, or the developers of Disney’s theme park attractions, and business management team.

First, based on the elements of Disney’s brand identity stated in the sources (i.e., Brannen, Fung and Lee) that have been and will be discussed in this proposal, as well as my interpretations of the Disney brand, which I have formed through watching Disney movies; reading Disney stories; and visiting Disneyland in California, Walt Disney World in Florida, Disneyland Paris, Disney’s Aulani Resort and Spa, and all four ships in Disney Cruise Line’s fleet, I will observe how much of the Disney brand is present throughout the attractions, merchandise, and other amenities that Shanghai Disney Resort offers. It is necessary to make these observations in person rather than read about each attraction in a press release or an online description, since a firm’s product offering must be physically experienced in order to have an in-depth and accurate understanding of the firm’s brand identity. It is also necessary to ensure that the authentic Disney brand identity is present in Shanghai Disney Resort to accurately measure brand loyalty to the Disney brand in the mainland Chinese market. If the Disney brand identity is not present in the park, then it would be impossible to determine whether or not Chinese consumers are brand loyal to the authentic Disney brand.

Secondly, in order to measure brand loyalty to Disney among Chinese consumers, it is necessary to conduct in-person interviews with Chinese guests, cast members, and Disney Imagineers/ business managers. According to members of the American Marketing Association, it is “insufficient” to conclude that one is brand loyal if he or she, for example, purchases “Brand A” more than six times over other brands in a “12-trial purchase sequence” (Jacoby 1). This would be an example of “repeat purchase behavior,” which, unlike brand loyalty, does not include a consumer’s “attitudes” towards a particular brand or require “purchases [of a particular brand’s goods and services] to be consecutive” (Jacoby 1). In order to accurately measure brand loyalty to Disney among Shanghai Disney Resort’s Chinese guests, it is necessary to obtain quantitative information to see if these consumers are making repeat visits to the park as opposed to alternative brands’ theme parks, as well as qualitative information that will assess guests’ attitudes towards the Disney brand; thus, the most effective way to measure brand loyalty is to conduct interviews with the three aforementioned groups of people at Shanghai Disney Resort.

First, I would interview guests of Shanghai Disney Resort who are from mainland China. I would make sure to interview people from different age groups and genders. I would ask them why they are going to the theme park. Are they going because they want to immerse themselves in the “Disney experience” (Fung 201)? Or, are they visiting the park for the purpose of “going and seeing it for a few hours,” just to experience a theme park and “unique technological innovations” (Fung 201)? I would also ask them if they enjoy the park, and, if they do, what their favorite attraction or element of the park is. Answers such as “seeing the Disney characters” or “experiencing an attraction that is inspired by my favorite Disney film” might suggest that Disney is succeeding in instilling brand loyalty inside of its guests. Finally, I would ask whether

or not they plan to visit this theme park as opposed to other brands' theme parks in the future, which will allow me to assess Disney's success or lack thereof in instilling brand loyalty inside of its mainland Chinese guests. It is imperative to visit the Shanghai Disney Resort and ask these questions while the mainland Chinese guests are experiencing the theme park's offerings, so that I will be able to collect these guests' immediate reactions for the most meaningful and accurate information to use as data.

Next, I plan on interviewing cast members to try to identify any signs of brand loyalty that are exhibited by them. I would ask them why they wanted to work at a Disney theme park as opposed to other theme parks in China. Did they apply to work at Shanghai Disney Resort because it was the only opportunity for them to make a living, or did they interview for a cast member position to represent the Disney brand? I would also ask them what their favorite part about working at Shanghai Disney Resort is.

In addition, I would want to find out how consistent the cast members' services are to Disney's "unique hospitality culture that is found in Disney parks of Western countries" (Brannen 610). Cast members of Western Disney theme parks may only be hired if they meet "specifications that are consistent with 'Disney' cultural values" and must endure a "rigorous forty-day Disney University program" that teaches them how to deliver to guests a "genuine Disney experience" (Brannen 609). I would ask them about their interview process to find out what kinds of questions were asked and why they think that they were selected to work for the Shanghai Disney Resort. I would also ask them if there were mandatory training sessions to learn about the unique service culture that many people of Western countries identify with the

Disney theme park experience. If these training sessions took place, I would ask how rigorous the programs were, what activities were completed, and what lessons were taught.

Finally, I will interview members of the Shanghai Disney Resort's Imagineering team to learn about the strategies that they implemented to balance adaptation to the unique elements of China, while maintaining the Disney brand image. I have potential connections to this Imagineering team in Shanghai, because my former acting professor from Loyola Marymount University now lives in Shanghai and will be a show performer at Shanghai Disney Resort. Her husband is Matt Almos, who is the "executive creative director of Walt Disney Imagineering creative entertainment" (Makinen 2) and has lead Disney's team that is in charge of coming up with and implementing the attractions and shows at Shanghai Disney Resort. I would ask this team which strategies that were implemented in the development of Hong Kong Disneyland were successful in encouraging brand loyalty among mainland Chinese consumers. As a follow-up question, I would ask them how they used Hong Kong Disneyland as a model for what to include and not include in the development of Shanghai Disney Resort, so that they can come as close as possible to achieve their goal of brand loyalty among Chinese consumers. Next, I would ask them what challenges they have faced while working with a Chinese state-owned enterprise who has more control over the development and culture of Shanghai Disney Resort. I would also want to know whether or not Disney's current marketing strategies and offerings at the Shanghai Disney Resort have been favorable to guests and have encouraged them to make recurring visits to the park. Finally, I would be curious to know if Disney has any plans to refine any elements of Shanghai Disney Resort that do not seem to capture the interests of guests or to make expansions to the park.

A list of potential interview questions for each of the aforementioned groups can be located after the “Itinerary” section of this proposal.

Expected Results

With the information that I will have gathered through my field work, I will be able to begin a valuable case study that will assess Disney’s ability to achieve its overall goal in the Chinese market. I will analyze the strategies that they implemented to best instill brand loyalty among mainland Chinese consumers through Shanghai Disney Resort. I will also present the Disney’s successes and failures to achieve the goal of brand loyalty, based on my observations and interviews, through Shanghai Disney Resort.

This case study will yield many benefits for students, companies looking to enter into Chinese markets, and Disney itself. First, this will be one of the first case studies that analyzes a Western theme-park company’s experiences during its entry into the Chinese market. One of my sources, *North American Firms in East Asia*, only analyzes the experiences of Western firms in the engineering and telecommunications industries. A case study for a theme-park company is relevant and necessary, because there are currently fifty-nine entertainment companies incorporated in Western countries who are building or planning to build theme parks in mainland China (Maniken). This will provide these other companies with a model of what has been successful and unsuccessful in achieving brand loyalty among mainland Chinese consumers, so that they will be able to maximize their chances of Chinese consumers becoming loyal to their brands.

Next, based on my reactions to the theme park’s offerings, and, more importantly, the mainland Chinese guests’ reactions, Disney may be able to use this information to make any

modifications to the park that it must to achieve its ultimate goal of instilling brand loyalty among Chinese consumers.

Also, since the park will be brand new after my research has begun, my study can be passed on to other individuals who are interested in Western businesses' expansions, strategies, successes, and failures in the Chinese market. As the park expands and as changes are made to help Disney come closer to achieving its ultimate goal in China, follow-up visits to the park can be made, so that it can be determined whether or not Disney's decisions and changes are successful in the long-term.

Conclusion

Disney's expansion into mainland China is exciting, but it will not be an easy task for the company to achieve its goal of instilling brand loyalty inside of mainland Chinese consumers. Will the elements of the theme park be able to appeal to vast cultural differences and a restrictive political system while maintaining the unique Disney brand identity? Will Disney be able to deliver an experience at the new Shanghai Disney Resort "that guests can only wish for regarding life experiences out of the parks" (Brannen 609) and will keep them coming back to Disney parks, as opposed to other brands' theme parks? Based on the answers to questions that I would ask Chinese guests, Disney's marketing team, and cast members of the Shanghai Disney Resort, as well as my thoughts about how well the elements of the new theme park identify with the characteristics of the Disney brand, I can come up with an answer to this question. This proposal for research of this questions will not stop once I have made conclusions regarding this topic; further studies and observations can be conducted as the park evolves over time. My

findings, as well as any future discoveries, will benefit the Walt Disney Company and may serve as an educational tool for future pupils of the marketing field.

Itinerary

Monday, August 1, 2016 - Tuesday, August 2, 2016

I will depart from Los Angeles International Airport on Monday, August 1, 2016 and arrive at Shanghai Pudong International Airport in the evening on Tuesday, August 2, 2016. I will travel from the airport to Shanghai Disney Resort and check into the hotel.

Wednesday, August 3, 2016

On my first day at the resort, I will experience the theme park's offerings and attractions for myself. I will experience amusement rides, watch shows and parades, browse the theme park's souvenir shops, and interact with characters and cast members to evaluate the authenticity of the Disney brand in the theme park.

Thursday, August 4, 2016

I will return to the park and interview mainland Chinese guests and cast members. I will also revisit attractions that I may have missed from the previous day to further assess the authenticity of the Disney brand within the park.

Friday, August 5, 2016

After two days of conducting interviews with guests and cast members and assessing the presence of the Disney brand inside of the park, I will interview members of Disney's Imagineering team who designed and built the theme park's attractions and offerings, as well as members of the business management team.

Saturday, August 6, 2016

I plan on visiting parts of Shanghai Disney Resort that do not need theme park tickets for admittance, particularly the resort's two hotels, Disneytown, and Wishing Star Park. I plan on conducting more interviews with resort guests and assessing the presence, or lack thereof, of Disney's authentic brand identity.

Sunday, August 7, 2016

I will depart from Shanghai Pudong International Airport and return to Los Angeles International Airport.

Interview Questions

Guests

- Why are you visiting Shanghai Disney Resort?
- Do you have a favorite Disney character or story? If so, which one?
- Are you enjoying your experiences at the park? Do you have a favorite attraction?
- Do you plan on returning to the park in the future? If so, when and how often?
- Do you often visit other brands' theme parks? Will you choose to visit Shanghai Disney Resort over other theme parks in the future?

Cast Members

- Why did you apply for a job at Shanghai Disney Resort?
- What is your favorite part about your job?
- What types of questions were you asked during job interviews? Are there any qualifications that are required for your job?
- Describe any job training that you underwent before you started working at Shanghai Disney Resort.

Imagineers/ Business Executives

- Considering cultural differences and a foreign political environment, what strategies were implemented in the development and creation of Shanghai Disney Resort's offerings and attractions?
- What lessons about pleasing and retaining guests have you learned from Hong Kong Disneyland? How were these lessons addressed in the development of Shanghai Disney Resort?

- Have you received any feedback from mainland Chinese guests about their experiences at Shanghai Disney Resort?
- Is there a growing trend in the number of annual passes being purchased by Chinese consumers as opposed to single-day ticket purchases?

Budget and Resources

In order for me to conduct thorough and meaningful research and to provide valuable information to my final product's audience, it is necessary for me to be provided with adequate financial resources. First, I plan on traveling to Shanghai, China from Los Angeles International Airport, which requires plane tickets as well as a Chinese Visa. I will also need funds to pay for transportation from the airport to the hotel, which is located on the Shanghai Disney Resort property. Next, I will need theme park tickets to enter the park, experience the park's attractions, and to interview guests and cast members who are from mainland China. In addition, I will need funds to provide me with basic necessities, such as food and hotel accommodations. It would also be helpful to have learned some of the Mandarin Chinese language before I go to Shanghai, so Rosetta Stone's Mandarin Chinese software has been included in the budget. Please refer to the breakdown of the total amount of finances that will allow me to maximize the thoroughness of my research below.

Roundtrip Airfare:

- Monday, August 1, 2016: Los Angeles International Airport (LAX) to Shanghai Pudong International Airport (PVG), operated by United Airlines. Depart LAX at 1:25 p.m. and arrive at PVG at 5:45 p.m. on Tuesday, August 2, 2016.

- Sunday, August 7, 2016: Shanghai Pudong International Airport (PVG) to Los Angeles International Airport (LAX), operated by United Airlines. Depart PVG at 8:10 p.m. and arrive at LAX at 5:20 p.m. on Sunday, August 7, 2016.

\$1,616.00, as of January 16, 2015

Chinese Visa

- **\$140**, as of February 5, 2016

- (<<http://www.china-embassy.org/eng/visas/fees/t1236036.htm>>)

Transportation

- Metro: 2, 1-Day Metro Passes, costing approximately \$3.00 (18 Yuan) each, for travel from Shanghai Pudong International Airport (PVG) to Shanghai Disney Resort.

\$6.00, as of January 16, 2016

Hotel

- Check In: Tuesday, August 2, 2016; Check Out: Sunday, August 7, 2016

- Approximately **\$469.00** per night, 5 nights

- Total= Approximately **\$2,345***

Theme Park Tickets

- 2 theme park tickets, costing approximately \$57.00 each

\$114.00, as of January 16, 2016

(<<https://www.shanghaidisneyresort.com/en/ticket/>>)

Food

- \$75 per day, approximately 5 days

\$375.00

Rosetta Stone Mandarin Chinese Software

- Approximately **\$250**

Total: \$4,846.00

* Room rates for Shanghai Disney Resort's hotels are currently unavailable. The estimated price for lodging is based on the rates at Hong Kong Disneyland's Disneyland Hotel.

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