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Scarinci, Janice, and Jeffers, Gene (2017) *Theme parks greet Asian tourists*. In: Pearce, Philip L., and Wu, Mao-Ying, (eds.) *The World Meets Asian Tourists*. Emerald Group Publishing, Bingley, UK. pp. 187-197.

Access to this file is available from:

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Please refer to the original source for the final version of this work:

<https://doi.org/10.1108/S2042%2D144320160000007011>

Chapter 10

THEME PARKS GREET CHINESE TOURISTS

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Abstract

This research explores what has been and is planning to be implemented in Orlando area theme parks to meet the specific needs of a rising number of Chinese tourists. The literature review examines factors affecting tourists travel decisions and will provide an overview of inbound Chinese tourists and their expectations and behaviors in theme parks. Based on this review, an online survey instrument was developed and implemented that focused on Orlando-based theme park professionals' creative design and operation strategies specific to meeting Chinese tourists' needs. The desired outcome of this research is to provide an initial overview of current and future efforts to meet the needs of Chinese tourists in Orlando theme parks.

Keywords: Theme parks, Chinese tourists, Orlando, operational and creative strategies

Biosketch

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1. INTRODUCTION

Within a few years of the 1971 opening of what has become Walt Disney World Resort, the Orlando, Florida area became the world's largest concentration of theme parks and related attractions. Today seven of the world's 25 most visited theme parks are in the area (Walt Disney World Resort's Magic Kingdom, EPCOT, Disney's Animal Kingdom, and Disney's Hollywood Studios; Universal Orlando's Islands of Adventure and Universal Studios; and SeaWorld) (Themed Entertainment Association, 2013). Dozens of additional themed and un-themed attractions have created an as-yet unrivaled destination for visitors seeking the experiences that such facilities provide. In 2013, with more than 70 million attending these seven parks alone, the area remains the undisputed "theme park capital" of the world. However, new theme park alternatives for those unable or unwilling to travel to Florida are being built at unprecedented rates worldwide, with concentrations in the Middle East and the Far East. At the same time, Asian travelers, and Chinese in particular, have begun to dominate global tourism (UNWTO, 2014). Through surveys of theme park professionals, this study explores industry opinions on what is being done today and will be done tomorrow to attract and engage Chinese visitors to Orlando, half a world, away when competing attractions now exist far closer to home.

Factors Affecting Tourists' Travel Decisions

Outbound tourists traveling to distant leisure destinations must first decide to invest in the time and expense of travel, hotel accommodations and other related costs. It has been theorized that such decisions are based on combinations of cognitive and affective factors relating to both the investment required and the rewards expected from the effort. Lin, Morais, Kerstetter, and Hou (2007) found that decisions to visit natural sites were made based on cognitive factors, to visit developed sites were made through a combination of cognitive and affective factors, and to visit

theme parks were made based on affective factors which created expectations that such visits would be pleasant, exciting and relaxing.

To attract tourists, developing an effective “destination image” is seen as an “essential factor for success” and an “important part of destination marketing strategies” (Castro, Armario, and Ruiz, 2007). How a destination is initially perceived, the expectations its “destination image” creates, have been shown to be critical components of the tourists’ eventual level of satisfaction with their visit (Assaker, Vinzi, and Connor, 2011; Castro et al., 2007; Chi and Qu, 2008; Lee, Lee, and Lee, 2005). According to Castro et al. the higher level of perceived destination image requires an increased level of satisfaction with the destination. In particular, meeting or exceeding expectations raised by the destination image are among the strongest predictor of repeat visits to a theme park (Geissler and Rucks, 2011; Castro et al, 2007).

This destination image must be tailored to the tourists’ culture, as they select and consume travel experiences through “prior knowledge, expectations, fantasies and mythologies” of their own cultures rather than those of the visited destination (Craik, 1997, p. 118). Tourists are “programmed with the cultural values rooted in their normal environment” (Kim & McKercher, 2011). Effective “destination images” must be developed around affective factors resonant with the tourists’ own cultural values. “It is therefore imperative for managers to understand cross-cultural issues in the tourism and hospitality industry to respond promptly in policymaking and compete successfully for market share” (Li, 2001, p. 43.).

2. LITERATURE REVIEW

2.1 Designing and Operating Theme Parks for Success and Guest Satisfaction

As tourist destinations, theme parks are intentionally designed, planned and built, “imagineered” by creative teams to strike specific resonances with their clients. They must then be managed by operation teams as highly specific cultural environments designed to attract and retain guests for

lengthy stays and repeat visits. Creative teams anticipate and design for the experiential needs of future guests and operations teams cater to the experience demands of the present guests. To succeed, theme parks rely on an effective combination of creative and operations teams (Price, 2006). Variations exist in how organizations structure these teams and their relationships, but whatever the approach, all theme parks seek to deliver valued guest experiences today while planning and building improved experiences for tomorrow.

2.2 Guest Satisfaction in US Theme Parks

Arlt (2008) noted Chinese tourists' behavior is not based on "Western individual values such as self-actualization, recreation as non-activity or individually-experienced authenticity" (p. 142). "They differ markedly from Westerners who seek post-modern authentic experiences; the Chinese instead aspire to a 'modern way of life' and visiting 'advanced' and 'developed' destinations is seen as a step towards this goal" (Chan, 2009, p. 73).

In particular, when visiting the US, Chinese visitors wanted "...to see how America measures up to the American Dream. They're familiar with the stereotypes of the United States as the richest, most advanced nation in the world... They want to see it in all of its brilliant modernity, to understand how far China has to go to catch up," (Dunlop, 2004). Given the enormous strides made in modernizing urban centers and building theme parks in China over the past decade, this assumption about America's destination image may no longer hold as much truth as it once did. In another discriminating characteristic, most outbound Chinese tourists travel in organized groups (ducklings), while a much smaller but growing number travel independently (free walkers). Destination image has been found to have a stronger impact on satisfaction and behavioral intentions of free walkers than on all-inclusive packaged visitors (Liu, Li and Yang, 2015). The author suggests that the quality of the tour service itself may have a compounding

effect on visitor satisfaction and behavioral intentions. They note the majority of outbound Chinese tourists will continue to travel in such groups for the foreseeable future.

2.3 Guest Satisfaction in Chinese Theme Parks

The growth in the number of theme parks within China has provided greater exposure, greater experience with, and increased satisfaction with domestic attractions (Li, 2001; Milman, Li, Wang and Qiuyang, 2012). Among the most important attributes identified by Chinese visitors to Chinese theme parks were “staff’s knowledge of the theme park, safety of roller coasters, security of the park, ticket price, and creativity exhibited in the park” (Milman, et al., 2012). Also seen as important were creativity, entertainment quality of the shows and activities, friendly and courteous staff, activities for kids, activities for families, layout of the park, variety of entertainment options, and quality of landscaping (Milman, et al., 2012). These findings are generally consistent with Milman’s (2009) North American study. Chung (2010) noted that domestic visitors to Chinese theme parks felt those facilities lacked in-depth theming and “interactive function.” The continued expansion and design improvements of Overseas Chinese Town (OCT), Chimelong, Dalian Wanda and other domestic theme parks in China, along with major transnational park projects from Disney and Universal continue to raise the quality of parks in China.

2.4 Florida Context and Visitor Trends

According to the United Nations World Tourism Organization, 83 million Chinese tourists spent \$102 billion dollars abroad in 2012 which made them the world’s largest tourism spenders (Levin, 2013). The United States is the only long distance destination in outbound Chinese tourists’ Top Ten list. The influx of these travelers to the United States began after America was granted “approved destination status” from the Chinese government in 2007. In 2012, nearly 1.5 million Chinese tourists came to the United States and the Commerce Department reported they

spent nearly US\$8.8 billion. “U.S. officials expect Chinese visitors to more than double nationwide” by 2018 (Gibson, 2013, para. 6). Visit Florida (2014), the state tourism marketing group, anticipates the number of Chinese tourists coming to the U.S. will reach 4.7 million by 2018. China is Florida’s fastest growing inbound market and almost tripled in size from 2010 to 2013.

Johnson (2013) reported 202,000 visitors in 2012, a 32 percent increase from 2011. According to Gibson (2013), Disney attracts the most Chinese visitors. Evan Saunders, CEO of Attract China stated, “It (Disney) has a large presence in China, in Hong Kong, so it’s a familiar brand... Orlando has been branded well through the media as a hot destination” (para 14). Saunders believes that the only limitation to attracting Chinese visitors is the number of visas that the United States issues (Gibson, 2013).

According to Visit Florida (2014), Chinese visiting Florida are predominately group travelers but there is an increase in the FIT traveler. The majority of the Chinese buy their packages from the top travel agents and they are staying on average from 11 to 12 days. They are going to fewer cities and staying longer with the major gateways being Orlando and Miami and an emphasis on shopping, dining, amusement and experiences.

Many Chinese visitors come to the United States to experience Western Culture and Theme parks they have seen on Television (Gibson, 2013). According to the Office of Travel and Tourism Industries, 2009 and 2010 market profile, studies indicated that shopping is the number one leisure activity for Chinese tourists. Tourism authorities in Southern California reported that the Chinese tourist want to have more personalized information on shopping outlet malls, shopping centers, local events and activities for their children. Chinese visitors book most of their hotels and activities online, therefore it is very important to feature a Chinese language

translation on the navigation of your web site and hire bi-lingual sales managers and front desk representatives (Chen, 2011).

Many hotels are changing the way they market their services to increase their share of the Chinese market. For example, they are adding popular Chinese dishes to their restaurants, adding at least one popular Chinese television station, providing increased amenities to the rooms including tea kettles and a selection of Chinese teas. Some hotels have hired front desk concierges fluent in Mandarin (Chen, 2011). According to Gibson (2013) Florida lacks needed service workers with Chinese languages, and has little Chinese signage, which makes travelling difficult for the Chinese tourist.

3. Study Methods

Orlando, Florida was chosen as the geographic location of this study due to the size of the entertainment industry in Orlando, the number of theme parks available and the sheer volume of international visitation. Three key theme park groups were chosen for this study: Walt Disney World Resort, Universal Orlando Resort and SeaWorld Orlando Resort, which combined, attract more than 70 million visitors each year (Themed Entertainment Association 2013).

Data collection was by way of online surveys of managers at major theme park groups. For the purpose of this study, the following research objective was developed: To explore what theme parks in Orlando are currently doing or are planning to do to attract and satisfy Chinese tourists needs and wants. Theme park creative and operations professionals were asked to identify specific tactics and approaches that are in current use or are being planned to specifically address the needs of Chinese guests (Appendix A, Questionnaire).

4. Results

This section contains the results and conclusions of online surveys distributed by email to 80 creative and operations professionals working at the three major theme park organizations in Orlando. Twenty-two completed surveys, a 27.5% response rate. Eleven reported as part of the creative team, 11 reported as part of the operations team. Overall, respondents reported working an average of 11-15 years in theme parks, with creatives reporting slightly more years of service than operations (Insert Table 1 Respondents' Years of Experience in Theme Parks).

Participants were asked to respond to 15 questions by indicating if their parks already have, are now planning to implement, are not now planning but likely will, or likely will not plan to implement a specific activity/attraction/resource relating to Chinese guests. An "I don't know" option was also provided.

4.1 Marketing and Advertising

Item 1: Marketing and advertising - Does your park advertise or promote specifically to the Chinese outbound tourist market? Respondents from Disney reported that such efforts were underway, and those from Universal and SeaWorld were evenly split between not seeing such marketing/advertising as likely in the future or simply not knowing if such efforts existed. "We see our expansion into China [through Hong Kong and Shanghai Disney parks) are integral to our global marketing of the Disney brand," wrote one respondent. "Every park, in a way, helps to market all of the other parks."

4.2 Human Resource Management

Item 2: Does your park currently employ personnel with Mandarin or Cantonese language capabilities? When asked if their parks had staff fluent in Mandarin or Cantonese, 16 of 21 respondents indicated their parks have personnel who speak at least one Chinese dialect. "With

one park in China now [Hong Kong], and another under construction [Shanghai], we've had access to operations staff fluent in Chinese," noted one respondent from Disney. Universal Parks and Resorts will also be opening a park in China [Beijing] within the next few years, so it is possible such staffing arrangements might take place within that system as well.

Item 3: Does your park currently provide any training specific to the needs of Chinese guests?

Only two respondents indicated they believed specific training for assisting Chinese visitors has been implemented by any of the surveyed park systems, and half (11 of 22) reported that such training did not exist and was not likely to exist in the future. "We do train our people on ways to assist international visitors, but do not break it out for any one specific nationality," explained a respondent from Universal.

Item 4: Does your park currently have any personnel specifically designated to work with Chinese tourist groups? "We began offering Mandarin speaking assistance to tour groups from China a couple of years ago," noted one respondent. Eight total respondents indicated there were personnel designated to work with Chinese tourist groups at their parks, another six indicated plans for such personnel were ongoing or likely to be initiated soon; five indicated they did not know if such personnel existed.

4.3 Signage and communication information

Item 5: Does your park currently have any Chinese language signage? Fifteen of the respondents reported no Chinese language signage existed, nor did they feel it likely would be provided in the future. Four (all Disney employees) indicated that such signage existed now, although one reported he "could not remember exactly where" he had seen such signage.

Item 6: Does your park use any Chinese-specific messaging or visuals in queue lines for major attractions? Sixteen respondents indicated that such messaging did not exist and that they

believed it would not be added in the future, with the majority of the remainder indicating they did not know. “We many different nationalities visiting our parks, right now the largest groups are from Brazil and South America, so if anything, we would probably begin with Portuguese or Spanish messaging,” one respondent wrote.

Item 7: Are there currently any queue management tactics or strategies in place for groups of Chinese visitors? “We certainly have systems in place for groups, just not specific for Chinese groups,” noted a respondent. In all, fourteen respondents indicated there were no queue management tactics in place for groups of Chinese visitors, the majority of the remainder indicated they did not know.

Item 8: Does your park offer any language-specific queue lines for major attractions? While eight respondents indicated their parks did not have and likely would not implement language-specific queue lines for major attractions, five respondents (all Disney employees) indicated that such lines existed. Such options also exist in Disney’s Hong Kong park, for example the Jungle Ride, which relies on a spoken narrative, has separate queue lines for Mandarin, Cantonese and English.

Item 9: Are there any programs in place at your park designed specifically for groups? “Group packages have been part of our system for years now, but to my knowledge as yet we haven’t been specializing for Chinese visitors,” reported one respondent from Disney. Twenty respondents reported that group programs of some kind were in place at their parks, and some parks do offer various language “packages,” primarily in the form of multilingual guides.

Item 10: Does your theme park offer informational materials, such as park maps or brochures, in Chinese? Ten respondents indicated that their parks offered informational materials in Chinese,

primarily from Disney and Universal parks. The remainder mainly indicated they did not know if such materials existed.

Item 11: Does your park offer mobile apps to assist guest navigation or other activities? “Given how everyone has their smart phones with them these days, mobile apps are essential for any park,” noted a respondent from Universal. “Our Discovery Guide mobile app has become very popular and continues to be improved and expanded every season,” reported a SeaWorld respondent. “There have been discussions about offering foreign languages,” but the respondent was unsure of any time frame or which languages might be offered. In all, nineteen respondents said their parks offered mobile apps to assist guests.

4.4 Food and Beverage

Item 12: In your park's food and beverage offerings, are there any specifically tailored to Chinese guests? Six respondents (all Disney employees) indicated that their parks offered food and beverage options specifically tailored to Chinese guests. Most likely this refers to the Nine Dragons Restaurant in the China Pavilion in the EPCOT World Showcase park. No one from other park systems indicated they had such services available, and most indicated it was not likely that such services would be provided in the future.

Item 13: Are any of the hotels on your property specifically "tuned" to cater to Chinese guests? Most respondents (13 of 22) reported they did not know if any of the hotels on their properties were specifically “tuned” to cater to Chinese guests, and another six indicated the hotels were not and likely would not be in the future. Three SeaWorld respondents noted they did not have hotels as part of their properties.

4.5 Programming

Item 14: Are there any attractions at your park that incorporate international culture or stories?

Eighteen respondents reported attractions that incorporated international culture or stories, indicating that all three park systems have at least some attractions that connect with overseas stories. These range from the national pavilions at EPCOT's World Showcase to specific aquarium features at SeaWorld.

Item 15: Are any of your park's attractions based on Chinese culture or stories? Nine respondents indicated that their parks had attractions based on Chinese culture or stories, including all of the Disney employees and some of the Universal employees. Again, the China Pavilion at EPCOT World Showcase is at least one specific example within the Disney parks. The remaining respondents either did not know, or reported no such attractions now or likely in the future.

5. CONCLUSIONS

While there currently are some Chinese-themed attractions and resources in theme parks in Orlando, the overarching view of professionals is that no new attractions, programs and materials are being planned, at least for the near future. Orlando hosts a wide range of international visitors, with far greater numbers coming from South America, for instance, and, in the opinions of creative and operations professionals, the parks do not seem to be actively planning for changes or improvements specific to Chinese guests.

With all of the park systems employing mobile applications to assist guests, the opportunity exists for relatively low cost adaptations of the apps for Chinese (as well as other language) versions. Similarly, website language adaptations are also possible to assist guests who prefer to use their own language when visiting the parks.

All of the parks appear to have resources dedicated to group visits, and this should also be seen as a relatively low cost opportunity to meet the needs of Chinese visitors, who largely prefer

traveling in groups. Staff fluent in Chinese (Mandarin and/or Cantonese) appear to be available in many of the parks already, and with the increasing number of Disney and Universal parks in China, staff exchanges and cross-training programs should grow the number of multilingual personnel available for such purposes.

Several factors may affect the growth trend of Chinese visitors to the Orlando theme parks, including the softening of the Chinese economy in recent months, and the continuing growth and quality improvement of theme parks in China and nearby Asian countries as well. Disney will soon have two parks in China (Hong Kong and Shanghai), Universal Studios is beginning construction of a park in Beijing, and Chinese groups, such as Chimelong and Dalian Wanda, continue to break ground on new properties. In addition, efforts in Dubai and Abu Dhabi to create an even larger concentration of theme parks than is available in Orlando will likely compete for outbound Chinese tourists.

To counteract these trends and continue growing attendance, Orlando parks continue to add new and powerful attractions, such as Universal Studio's expansion of the highly popular Harry Potter experiences. Finding ways to make international visitors feel more welcome through signage, messaging, familiar food and beverage offerings, hotel accommodations, various language mobile apps and websites will become ever more important in an increasingly competitive theme park world. If Orlando is to remain the "theme park capital of the world" park systems will need to invest in attractions and programs designed to make international visitors feel more welcome and comfortable within their properties, especially high growth sectors such as Chinese tourists.

Table 1: Survey Respondents' Years of Experience in Theme Parks

Years	Creative	Operations	All
0 – 5	2	2	4
6 – 10	1	2	3
11 -15	2	3	5
16 – 20	0	1	1
More than 20	6	3	9
Total	11	11	22

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Appendix A

Theme Parks Greet Chinese Tourists

A survey of Orlando-based theme park designers and operators - Please take a few moments to answer the following questions

Current or Future efforts in your theme park specific to Chinese guests

1. Marketing and advertising - Does your park advertise or promote specifically to the Chinese outbound tourist market?
 - Yes, we currently do
 - No, but we are planning to
 - No, we are not planning to, but I expect we will soon
 - No, and I do not expect we will
 - I don't know

2. Does your park currently employ personnel with Mandarin or Cantonese language capabilities?
 - Yes, we currently do
 - No, but we are planning to
 - No, we are not planning to, but I expect we will soon
 - No, and I do not expect we will
 - I don't know

3. Does your park currently provide any training specific to the needs of Chinese guests?
 - Yes, we currently do
 - No, but we are planning to offer such training
 - No, we are not planning to offer such training, but I expect we will soon
 - No, and I do not expect we will
 - I don't know

4. Does your park currently have any personnel specifically designated to work with Chinese tourist groups?
 - Yes, we currently do
 - No, but we are planning to add such personnel
 - No, we are not planning to add such personnel, but I expect we will soon
 - No, and I do not expect we will
 - I don't know

5. Does your park currently have any Chinese language signage?
 - Yes, we currently do
 - No, but we are planning to add such signage
 - No, we are not planning to add such signage, but I expect we will soon
 - No, and I do not expect we will
 - I don't know

6. Does your park use any Chinese-specific messaging or visuals in queue lines for major attractions?
- Yes, we currently have Chinese messaging
 - No, but we are planning to add Chinese messaging
 - No, we are not planning to add Chinese messaging, but I expect we will soon
 - No, and I do not expect we will
 - I don't know
7. Are there currently any queue management tactics or strategies in place for groups of Chinese visitors?
- Yes, we currently have such queue management tactics or strategies
 - No, but we are planning to add queue management tactics or strategies
 - No, we are not planning to add such tactics or strategies, but I expect we will soon
 - No, and I do not expect we will
 - I don't know
8. Does your park offer any language-specific queue lines for major attractions?
- Yes, we currently do
 - No, but we are planning to
 - No, we are not planning to, but I expect we will soon
 - No, and I do not expect we will
 - I don't know
9. Are there any programs in place at your park designed specifically for groups?
- Yes, we currently have such programs
 - No, but we are planning such programs
 - No, we are not planning such programs, but I expect we will soon
 - No, and I do not expect we will offer such programs
 - I don't know
10. Does your theme park offer informational materials, such as park maps or brochures, in Chinese?
- Yes, we currently have such materials
 - No, but we are planning such materials
 - No, we are not planning such materials, but I expect we will soon
 - No, and I do not expect we will offer such materials
 - I don't know
11. Does your park offer mobile apps to assist guest navigation or other activities?
- Yes, we currently have mobile apps
 - No, but we are planning mobile apps
 - No, we are not planning mobile apps, but I expect we will soon
 - No, and I do not expect we will offer mobile apps
 - I don't know
12. In your park's food and beverage offerings, are there any specifically tailored to Chinese guests?
- Yes, we currently have such food and beverage offerings
 - No, but we are planning such food and beverage offerings
 - No, we are not planning such food and beverage offerings, but I expect we will soon
 - No, and I do not expect we will offer such food and beverage offerings
 - I don't know

13. Are any of the hotels on your property specifically "tuned" to cater to Chinese guests?

- Yes, we currently have such hotels
- No, but we are planning such hotels
- No, we are not planning such hotels, but I expect we will soon
- No, and I do not expect we will
- I don't know

14. Are there any attractions at your park that incorporate international culture or stories?

- Yes, we currently have such attractions
- No, but we are planning such attractions
- No, we are not planning such attractions, but I expect we will soon
- No, and I do not expect we will
- I don't know

15. Are any of your park's attractions based on Chinese culture or stories?

- Yes, we currently have such attractions
- No, but we are planning such attractions
- No, we are not planning such attractions, but I expect we will soon
- No, and I do not expect we will
- I don't know