



# A Look at Japan's Disneyland Culture

Drafted by: Intern Kotone Nakamatsu  
Edited by: Yuri Arthur  
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## **Introduction**

Most non-Japanese are shocked when they learn that Japan boasts not only one, but two Disney theme parks right next to each other. The popularity of Disney in Japan is significant with a range of not only Japan specific Disney trends, but also Japan specific merchandising.

This report will touch on the market impact of the two theme parks while also elaborating on Japan specific trends. Understanding Japan's unique emphasis on Disney culture, may translate into potential business opportunities.

## **The Value of Japan's Disney Market**

Tokyo Disney Resort is among the most successful theme parks in the world, made up of Tokyo Disneyland and Tokyo DisneySea. The DisneySea Park is ocean-themed and consists of seven main attractions, including The Mediterranean Harbor, Lost River Delta, and Mermaid Lagoon. Unique to Japan, it also targets older people as they serve beer and offer more thrilling rides compared to Disneyland.

While both parks boasted their highest recorded annual attendance at 31,377,000<sup>1</sup> in fiscal year (FY) 2014, FY 2015 annual attendance was not far behind at 30,191,000<sup>1</sup>. Considering that Japan has a population of approximately 127 million<sup>2</sup> people, this implies that roughly 22% of the Japanese population went to Tokyo Disney Resort in FY 2015, taking into account that 6%<sup>1</sup> of guests were from overseas. To put this into perspective, roughly less than 11%<sup>3</sup> of the American population went to Disneyland California and Walt Disney World combined in FY 2015. Most travel agencies offer package tours specifically for Tokyo Disney Resort from all over Japan, and a visit to Tokyo from outside of the Kanto region usually involves a stop there regardless of age. This partly explains the impressive level of attendance in Japan.

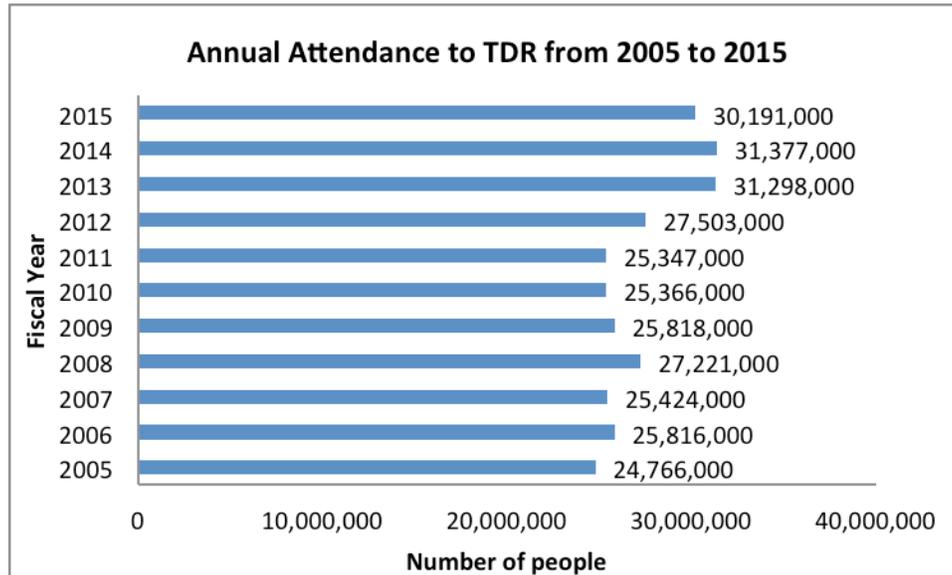
Despite tickets being rather expensive, Japanese guests spend more inside the resort, contributing to a value of 11,257 JPY (approximately 112 USD) of net sales per guest in FY 2015.

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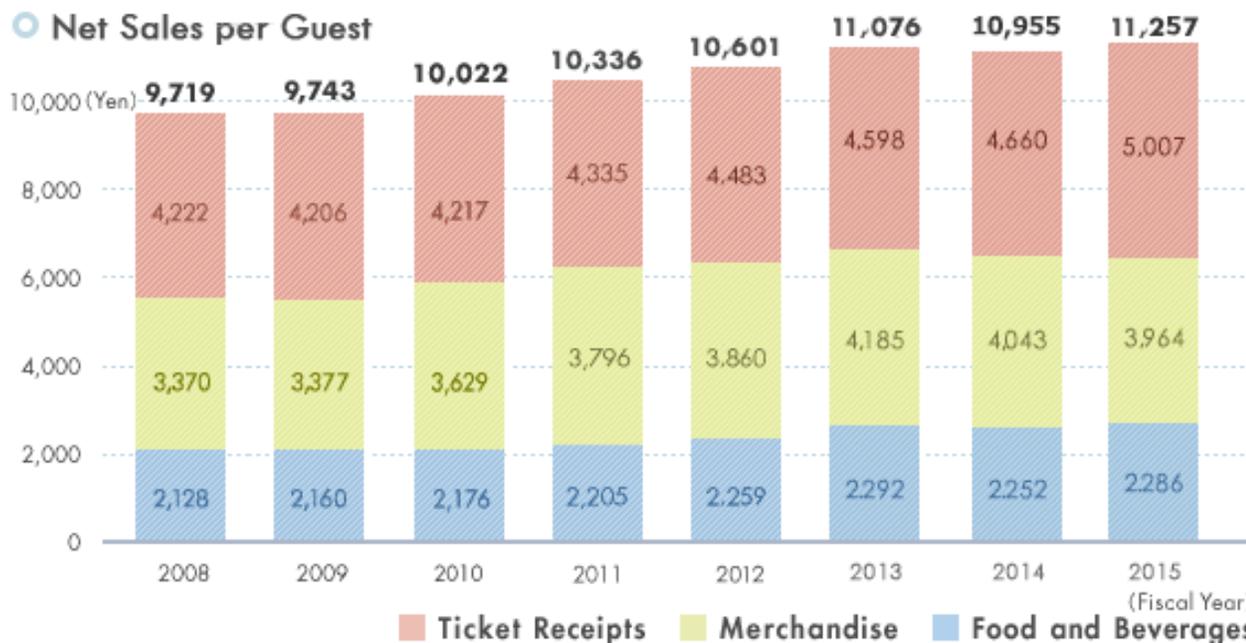
<sup>1</sup> OLC website; <http://www.olc.co.jp/en/tdr/guest/>

<sup>2</sup> JapanGov website; <http://www.japan.go.jp/japan/facts/index.html>

<sup>3</sup> Themed Entertainment Association (TEA), Global Attractions Attendance Report; [http://www.teaconnect.org/images/files/TEA\\_160\\_611852\\_160525.pdf](http://www.teaconnect.org/images/files/TEA_160_611852_160525.pdf)



OLC Website



Graph showing Net Sales per Guest each year at TDR, taken from the Oriental Land Company.

In trying to understand Tokyo Disney Resort’s success a good place to start is the Disney phenomenon in Japan. Disney films generally tend to do well in Japan, with “Frozen” ranking number three for all-time favorite movies. It is interesting to point out that FY 2014 had the greatest attendance and net sales, which was also coincidentally the year “Frozen” was released in Japan. The film has so far brought in 254.8 million<sup>4</sup> JPY (approximately 2.5 million USD),

<sup>4</sup> <http://www.kogyotsushin.com/archives/alltime/>

and following this immense hit Tokyo Disney Resort has announced plans to add a “Frozen” themed area expected to open in 2017.

### **Japan Specific Disney Trends**

One of Tokyo Disney Resort’s unique characteristics is that a majority of guests are frequent visitors. To be specific, of those surveyed in FY 2000, over 19% had visited more than 30 times, and only 2% were first time visitors<sup>5</sup>. The guest profile given by Oriental Land Company (OLC), the owners of Tokyo Disney Resort, states that over 70% of guests are female, over half are in the age group 18-39, and approximately 70% live in the Kanto region. Given these statistics, it is sensible to assume that standard frequent visitors tend to be young women who live relatively near Tokyo Disney Resort in the Kanto region in their 20s and 30s. In addition to their devotion to Disney, these women have other similar characteristics, as making “Ladies Trips” is a common trend. Part of this trend involves wearing matching outfits and/or Disney-related items, ranging from t-shirts and Mickey Mouse ears, to full Minnie Mouse costumes. The underlying factor that makes this trend feasible mainly comes down to the reality that this group has the most disposable income to purchase tickets, gifts, and accessories. These young and economically active women have the finances to truly enjoy the Disneyland experience, often being young working women living at home.

Another trend unique to Japan is that of going as a couple. Often a date to either Disneyland or DisneySea marks a significant step in a relationship, to the point that even the Tokyo Disney Resort website has a section specifically devoted to couples, which has “Tips and Hints for Spending a Day at Tokyo Disneyland/DisneySea as a Couple.” They provide a map of the park with a route showing different restaurants and attractions; DisneySea for example recommends starting at the DisneySea Plaza right by the entrance for a photo, then onto Aquatopia for a ride, and at the end of the day finishing at the Ristorante di Canaletto for a Venice-themed romantic dinner. Unlike in the States, men are expected to have planned the whole day beforehand; reserve a table at the nicer restaurants, to know a designated spot to watch the parade from, and even a knowledge of fast passes. Another unique couples trend in Japan is that of spending Christmas Eve at either Disneyland or DisneySea. In fact, men are praised for getting hotel and dinner reservations within the park on Christmas Eve as this demonstrates foresight and planning skills to ensure a truly romantic evening.

A more recent trend catching popularity in Japan is the all-male “Disney Danshi” trend, which as its name suggests, involves a group of men visiting Tokyo Disney Resort. This allows them to enjoy it in a completely different way, without having to compromise and constantly mind the preferences of their significant other. Another benefit of participating in “Disney Danshi” is the economic aspect, in the sense that they do not have to worry about paying for their partner. It seems only fair that groups of men can now also enjoy the park just as groups of females have been for quite some time. It is becoming more common to see such groups of men, usually in their 20s and 30s, all dressed in matching attire. This ranges from something as simple as a matching t-shirt or a hat, to a full coordinated outfit often of a Disney character.

Tokyo Disney Resort’s ability to effectively market towards different groups of customers is part of the many reasons of its success. Disneyland also held its first non-heterosexual wedding in 2013, which was only symbolic as same-sex marriage is not completely legal in Japan.

### **Gift Giving Culture**

Gift Giving in Japan surrounds a huge aspect of social and cultural implications, and fuels the Disneyland culture. Gift giving is perceived as an essential part of developing relationships, whether they be personal or business related. A study into cross-cultural consumer behaviour shows that Japanese individuals were almost twice as more likely to partake in gift giving

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<sup>5</sup> Yukio Toyoda – Recontextualising Disney: Tokyo Disney Resort as a Kingdom of Dreams and Magic

compared to their American counterparts<sup>6</sup>. Different intentions accompany various situations, such as returning a favour, showing appreciation, celebrating a joyful occasion, or even sharing a sad event, and as one can imagine it all comes with a complex set of rules. Such a prevalent gift giving culture simply narrows down to two factors, firstly the relationship-building aspect, and secondly, the existence of countless gift giving occasions.

At Tokyo Disney Resort, excluding ticket sales, much of the net sales per guest is spent on merchandise, which was 3,964 JPY (approximately 39 USD) in FY 2015, of the 11, 257 JPY (approximately 112 USD) of net sales per guest. Frequent guests tend to collect merchandise, encouraging them to purchase something on every visit. The World Bazaar in Disneyland serves the gift giving needs of Japanese culture, as they have souvenirs unique to Japan. Within this culture, souvenirs tend to follow certain guidelines; firstly, a souvenir has to be a local specialty, and secondly, tends to have a legitimating mark or tag to prove that it was purchased at a particular place. All souvenirs say either 'Tokyo Disneyland' or 'Tokyo Disneysea', and there is also an onsite postbox from which customers can send special Mickey Mouse stamps. An example of popular souvenirs in Japan are the range of packaged cookies and sweets that come in sets of 4, 6, 12, 24, as this makes it easier to hand out at work, to family, and friends. This explains the gift giving culture in which people are expected to bring back souvenirs from holidays, and is especially true when they travel from outside the Kanto region. There are roughly 46 souvenir stores in Disneyland and 36 in DisneySea, where they have everything Disney-themed from chopsticks to hats and even lint rollers.

One item that stands out is 'Duffy' the bear. 'Duffy' is extremely popular in Japan, and lives in DisneySea. The 'Duffy' phenomenon is endless, from merchandise to shows, and even Duffy designated picture spots. He is one of many great examples of how American culture has been embraced by the Japanese, and also incorporated into its own culture. A combination of the gift giving culture, devotion to Disney, and exclusive souvenirs contribute to the relatively high value of net sales per guest on merchandise, which also encourages annual attendance.

### **Halloween**

The concept and celebration of Halloween was initially introduced at Tokyo Disney Resort as a seasonal event to boost attendance and sales, but soon caught on to become an annual celebration. It was first introduced in Disneyland in 1997 as a 'Disney Happy Halloween' event, and in 2000 the 'Happy Halloween Twilight Parade' made its debut. Tokyo's Halloween scene is one of a kind, as people gather at popular spots such as Shibuya and Harajuku in all sorts of costumes, and it is no surprise that Halloween became a huge success in a city with a rich subculture of cosplay. In 2015 close to 100,000 people gathered in the streets of Shibuya to celebrate Halloween, and to top it off trick-or-treating is even becoming popular in childcare facilities and retirement homes.

As Tokyo Disney Resort extends limited edition decorations and parades specific to Halloween, this encourages visitors to attend during this period. To continuously attract guests, their Halloween event is different each year along with its seasonal merchandise and food. This year in 2016 Disneyland is hosting a Halloween music festival, where Mickey Mouse and his Disney Friends are taking part in musical performances in 'Halloween Pop'n LIVE'. Unlike other Disney Parks outside of Japan, all the Halloween entertainment is included in the normal park ticket. Not only did Tokyo Disneyland introduce Halloween to Japan, it also continues to charm visitors for its exclusive seasonal event, and it does so by introducing a different kind of Halloween each year.

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<sup>6</sup> R. Green and D. Alden- Functional Equivalence in Cross-Cultural Consumer Behaviour: Gift Giving in Japan and the United States

## **Recommendations**

It is quite surprising just how popular Disneyland is in Japan. The park and associated merchandise have become a part of Japanese life, a highlight for vacations to Tokyo, and a must do activity for couples. Products that do not exist in other countries are the norm in Japan. One can purchase a pearl faced Seiko Cinderella clock, an insulated Japanese style Elsa lunchbox, Disney themed stockings, a wooden Mickey Mouse business card case, and even Disney high end jewelry in precious metal. While a young male in the United States would not be expected to carry a chain Mickey Mouse necklace or wooden Mickey Mouse business case holder, this is acceptable in Japan. Buying a girlfriend a white gold Minnie Mouse necklace is considered a very thoughtful and serious gift, and returning the office after a weekend trip to Disney mandates a box of individually wrapped cookies to share.

Every year, the Tokyo International Giftshow boasts a Disney Pavilion where buyers flock to secure the latest merchandise. Department store buyers flock to buy Star Wars themed chopsticks, or Disney themed high end lingerie. The potential for additional Disney merchandise in Japan is something to consider as U.S. companies determine what type of products might have a chance in Japan.

All companies interested in exporting consumer goods to Japan should consider attending the Tokyo International Giftshow to see the types of products popular in Japan. Many fail to realize the sheer diversity and high level of quality that is the norm in Japan. There is nothing that can substitute attending a tradeshow to fully understand this.

## **Tokyo International Giftshow 2017**

<http://www.giftshow.co.jp/english/>

We recommend that U.S. companies to look at the range and quality of products offered in Japan, as there may be windows of opportunity for committed players properly capturing Japan's Disney culture.