CUSTOMER SATISFACTION MEASUREMENT

at DISNEYLAND® PARIS

Eloi Courcoux
Managing Director
Business Solutions – Disneyland® Paris
“You don’t build it for yourself. You know what people want and you build it for them.”

Walt Disney
CUSTOMER EXPerIENCE : OUR PRIORITY

• 16M visitors at Disneyland Paris

• 134 000 surveys sent, 40 000 respondents => return rate of 30%

• Overall Satisfaction : 63% of completely and very satisfied clients

1- Research activity fully oriented on maintaining high levels of:
   • Markets comprehension
   • Guest Experience
   • Intention to Revisit & to Recommend

2- Support our decision leveraging “the voice of the Guest”
   • To shape marketing & sales, revenue and operational strategies
Disneyland Paris Consumer Insight:
- A dedicated team
- EMEA Expertise center
- 100% in-house

Adapted to all targets:
- Leisure vs Business
- Cultural difference
- Volume of visitors
A METHODOLOGY IN ACCORDANCE WITH EACH OF OUR GUESTS

**Why?**
Activities penetration and Guest satisfaction with Parks, Disney Village and Hotel (Disney or S&A) experiences.

**What?**
Face to face park interview (i.e. Food)
Internet-based study (i.e. Hotels).
Invitations containing a link to the survey are sent out weekly.
Respondents have one week to respond to the invitation.
5 points scale (Completely S, Very S, S, barely S, UnSatisfied)

**How?**
In-person intercept in both parks.
Coupon on the check-in form, filled in by Guests in each Disney Hotel.

**When?**
Monthly Reporting
Case Study

• Disney Dreams

• New rooms perception

• Pricing and Communication
Disneyland® Paris is Europe’s biggest integrated events venue

- 20 years’ experience
- 1,000 events every year (external and internal)

Business Solutions: a 200-strong dedicated events team

- 200 strategic and operational talents
- Meetings & Conferences, Gala Dinners & Privatizations, Reward & Incentive, whether the number 50 or 25,000

Bespoke solutions

- Creativity
- Innovation
- Impeccable service

=> to ensure we meet the clients’ challenges and provide a bespoke solution for their event

Clients’ expectations are different (leisure vs corporate)

Approach and Interest remain the same

The customer experience is our priority
All the events are interviewed (600 events/year) / Average return rate of 75%
Survey over the phone (a one-to-one conversation), 3 weeks after the end of the event
Questionnaire: about 80 to 100 questions (closed questions and proposition to add comments)

Written report of each interview
sent to all the persons involved in the event + management
(sales & organization + operations)
Incentive given to employees upon performance

Results every month and Summary 3 months (quantitative and qualitative)
sent to all the relevant departments

Analysis and corrective action plan
Specific call back to each Unsatisfied Client by Management
Case study

- Preparation and Follow up
- F&B
- WI-FI
- Accommodation
CONCLUSIONS BY THE END OF FY13

+ **FY13 Learnings**

- The duration of the survey is too long (30-45min)
- The weak base of respondents on some specific places and services
  => insignificant results, no conclusions and possible recommendations

+ **Objectives**

- Get more respondents
- Get more meaningful & spontaneous comments
- Better anticipate and follow dissatisfaction
- Establish corrective actions through a new and more suitable tool
- Develop customer relationships and increase loyalty

+ **Evolution FY14**

- Develop a new, brief non-oriented questionnaire, based on the Net Promotor Score approach with open questions
- Analyze customer comments (qualitative analysis) to quickly identify: areas for improvement, our products and services and customer loyalty
The approach remains the same:
The meeting planner is interviewed over the phone 3 weeks after the end of the event.

The questionnaire is different:
from 80 closed questions to 3 closed questions + 4 open questions.

Data processing based more on comments & semantic analysis.

Monthly & Quaterly Reportings.
Satisfaction Survey

3/ What do you think about the preparation and organization of your event with your contact (understanding of your needs, advice, reactivity...)?

4/ According to you, what are the main strong points of your event (meeting rooms, accommodation, food & beverage, entertainment...)?

5/ On which aspects, services, or infrastructures should we have to improve on?

6/ What are your additional comments or suggestions about your event?

We thank you for your answers and comments.
Results Q1 FY 14 (Oct-Dec 2013)
NPS and analysis of customer verbatim
<table>
<thead>
<tr>
<th></th>
<th>Net Promoter Score oct-dec 13</th>
<th>Net Promoter Score LY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Objective promoters</strong></td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td><strong>detractors</strong></td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>39%</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>53%</td>
<td>57%</td>
</tr>
<tr>
<td></td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Global Preparation &amp; Follow up oct-dec 13</strong></td>
<td>66%</td>
<td>72%</td>
</tr>
<tr>
<td></td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Global Operations oct-dec 13</strong></td>
<td>69%</td>
<td>76%</td>
</tr>
<tr>
<td></td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

All events interviewed in Q1 (Oct-Dec) / Return rate: 72%
SALES & ORGANIZATION

Strong Points

- 93% of comments made spontaneously on the preparation and monitoring of their event are positive
- Good relationship
- Understanding of the needs and objectives
- Responsiveness

Axis for improvement

- 23% spontaneously expressed comments on the preparation and monitoring of their event are axis for improvement
- Availability of the event manager (trouble in reaching event manager over the phone)
THE EVENT ON-SITE – STRONG POINTS

49% of comments focused on the F&B
- Quality of food
- Courtesy of staff

41% of comments focused on the professionalism of the teams and the good organization of their event.

29% spontaneously expressed positive comments on the entertainment, gala evening

25% spontaneously expressed positive comments on the meeting rooms

More than a quarter of interlocutors offer no suggestion for improvement, they are particularly satisfied with the conduct of their event.
THE EVENT ON-SITE – AXIS FOR IMPROVEMENT

- 19% of comments focused on the F&B Quality/Price ratio
  - Coffee break

- 14% of comments focused on the accommodation (obsolescence)

- 14% of comments focused on the Meeting rooms (comfort)

- 14% spontaneously expressed comments on the entertainment, gala evenings

Catering and meeting spaces emerge into strengths and axis for improvement => very important points for event organizers
Objective: Strive for excellence

- Improve reporting
- Improve communication

97% of our clients are satisfied
THANK YOU

For any further information:
Vanessa PIERRE- Marketing Executive
01 60.45.74.66
vanessa.zajd-pierre@disney.com