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THE MAGIC OF DISNEY'S PARKS AND RESORTS

– Reasons of its sustainability

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The thesis tells all about the design of the Disney's parks and resorts by the Imagineers (workers who dream up, design and build all the Disney's parks and resorts), the competition against the biggest companies in the entertainment industry, and the solutions of Disney to maintain its position as the top leaders. Two surveys have been made to understand the preferences of the consumers, in Europe and in America, where the competition is the biggest in Orlando, Florida, and where the methodology has been explained. Disney has put in place some strategies to face against Universal which had a raise of attendance those last few years. The main objective of the thesis is to identify the factors that differentiate the Disney's Parks of the others. The Five Porter Forces will be used to understand the competition in this industry and the methodology about the surveys will be explained. Throughout this work, we will be able to find out the purchases Disney had to do to face Universal and the other competitors. Disney had indeed to do some purchases to have its own superheroes with Marvel, to buy Lucasfilm and the 21st Century Fox to renew its parks and sustain its post as the top leaders, thanks to its "Disney Magic".

KEYWORDS:

Disneyland, magic, Universal, parks, lands, hotels, resorts, Porter's 5 Forces, Imagineers, competition, movies, purchases, design, solutions, studios

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1 INTRODUCTION

The Walt Disney Company is a leading diversified international family entertainment and media enterprise in media networks, parks and resorts, studio entertainment, consumer products and interactive media.

It all began with a cartoon studio in the 1920s, and the company is still creating stories and experiences for each member of the family. It will not be until 1955 that the first Disney's Park opened in California (Designing Disney, 2016). Their mission is to be the one's of the world's leading producers and providers of entertainment and information (The Walt Disney Company, 2018). They have a portfolio of brands in order to differentiate their content, services and products, seeking to develop the most creative, innovative, and profitable entertainment experiences and related products in the world. Disney has the will to use the latest technology, innovation, creativeness, and to expand into new markets around the world. Indeed, they operate in more than 40 countries (Disney Careers, 2018)

The Walt Disney Company is really careful when it is about to choose its management team and its board of directors, seeking for their experience, coming from renowned global organizations and industries in order to mix their knowledge, and their devotion to please the heart of families (The Walt Disney Company, 2018).

The company has received many nominations and awards, including the one of the "world's most admired companies" by Fortune (Fortune, 2018). Moreover, they are taking their responsibilities as a company very seriously, as promoting ethical production, trying to improve the labor conditions in production facilities, testing the safety and integrity of the products, and exploring ways to respect the environment (Leadership, 2013). The company is very diversified with its portfolio of brands such as its media networks (Disney Channel, ABC), its entertainment studios (Pixar Animation Studios, Marvel Studios), and is good and focused on each one of its brand, but this thesis will target more on Disney's parks and resorts (The Walt Disney Company, 2018). Moreover, Disneyland Paris represents 6.2% of the France's tourism income (Martin, 2018). In 2016, it was the most visited attraction park of Europe with 8.4 million of visitors, but it was still 14.2% less than the year before and the Studios got 4.9 millions (Aude, 2017).

The universe of Walt Disney has always been present into the lives of different generations of kids and adults. Most people have watched when they were younger the classical animated movies. Those same people became parents and then watched the same animated movies with their children. It has become a family ritual and the movies are a "must to watch" for their kids. They want to see the magic in their eyes and it will make even more sense when they will bring them to the parks. Then, with the inspiration of the Disney's animated movies, the first Disney's Park has been created in 1955 in Anaheim, California (Muir, 2015). Other parks were built after, including Disneyland Paris in 1992 (Disney Holidays, 2018), and in other parts of the world. It is a really good place to go for families, at all age. As their tagline says, it is the place "where dreams come true".

1.1 Personal Motivations

I always have felt very connected to this industry because I have been countless times, since I was a baby, to Disneyland Paris, and my family and I have always been there when new rides were showing up. I also really loved watching movies, including the Marvel's ones and the Star Wars'. Indeed, I have followed very carefully what the company has done, as Disney bought many others, such as Pixar Animation Studios, Marvel Entertainment, Lucasfilm, and its latest acquirement: 21st Century Fox.

Moreover, I have been lucky to go to Disney World in Orlando, Florida, where I have been able to discover its different parks and its competitors: SeaWorld, Universal Studios and Island's of Adventure. I got to know that Disney World gathers four big parks where Magic Kingdom is the one looking like Disneyland Paris, but it also has Epcot Center, Animal Kingdom and its Hollywood's Studios. I really love the joy you can find when going in these places; the kids hunting for pictures with characters and the parades the parks are choreographing for people to enjoy. When you enter in the park, it is like you have no problems anymore. It is impressive how you can feel the happiness of people, and everyone just wants to spend the best experience they can have. I really think we need Disney in our world, to make it happier and to forget our problems, at least just for one moment.

I would really like to have a job there to see how it is like on the other side (not as a tourist but as an employee of the Walt Disney Company), and to make people happy as best as I could. That is why it is really important to me to do a thesis based on this

company and especially in their entertainment department because, as their slogan says, this is the “happiest place on Earth” (Visit Disney, 2018), and what is better than to work in such an environment. I am really motivated to do a great job and lots of research to cover the topic that I am really interested in. It seemed logical for me to choose my thesis on the theme of Disney’s Parks and Resorts because of my knowledge about them, and because I wish to do my 6 months internship next year in Disney World, Orlando, Florida. Also, this topic could be quite interesting to cover because of the renown of Disney and about how it did manage to go from nothing to the biggest company of entertainment in the world.

1.2 Thesis Objectives

The main objective of this thesis is to identify “the main factors differentiating the Disney’s Parks from its competitors”.

When it has bought other companies related to the movie industry such as Marvel Entertainment, Lucasfilm and the 21st Century Fox, it was to touch a bigger audience and to have a “unique portfolio of brands providing significant opportunities for the long-term growth and value creation” (Roberts, 2009). Disney was able to renew its parks by creating new amusement rides and characters related to their new movies to welcome the fans. What is really important when people are going to an amusement park is the experience it is giving to them with their friends or relatives, and each park has a different way to make people enjoy themselves. Disney is really different from the others because it has the only ones that give a special feeling of magic, and make the kids happy, and by the same occasion, make their parents happy as well. The company has also big advantages compared to the other parks of the world thanks to the uniqueness of their products, delivering them to every person of the world (Williams, 2017).

Disney is doing a lot of movies that are inspired from its classical animated movie, which are very welcomed by the fans. They are making characters kids have grown up with alive. Also, it is important to discover its path to its incredible success that it has today. The competition is getting tougher with Universal which is becoming really popular and loved by its consumers, so the objective is to know how Disney can keep its place as the top leaders of the market, and to find a new way to compete against them.

Here are the research questions :

- 1) What initiative will Disney take to remain in the top players in the industry
- 2) What actions is Disney taking to compete against its rivals ?
- 3) What are the ways Disney uses to keep renewing its image and to continue attracting customers?
- 4) How Disney is taking advantage of its brand portfolio (Marvel Entertainment, Lucasfilm, 21st Century Fox) to keep its parks attractive?
- 5) Has the competition changed throughout the years?
- 6) What do people think now of the Disney's parks?
- 7) How does Disney manage to maintain and develop the "Disney Magic" from one generation to another?

1.3 Thesis Structure

For the biggest fans of the parks, there are some books that exist revealing the stories of the rides, and you can see the connection between each of them, and it is really interesting to read and to understand how the parks, along with their lands and hotels, were made and designed, and this is what we will see in the first part of this thesis. The Imagineers have thought about every detail and had to adapt to the people from each country where Disney is implanted. When they are designing it, they want to see people happiness and they want to create a unique atmosphere.

The rivalry in this industry is quite hard with 3 big competitors which are Six Flags Entertainment, Cedar Fair and Comcast which owns the Universal's Parks and Resorts. My contribution in this thesis would be to analyze the strengths of Disney and the ones of Universal, its main competitor, and to figure out how Disney has sustained its position as the top leaders of the entertainment industry. This will be the second part of the thesis.

Two surveys have been made to understand the consumers' choices and preferences towards the parks: one in Europe and one in America. In fact, the answers are quite the same but due to the presence of big companies in America such as Universal, it is harder for Disney to be the only choice for the visitors, and the company's ambitions for the next years needed to be revealed. Indeed, the competition is getting tougher and tougher with the launches of new rides in Universal, and there is no choice but to face the facts and try to find solutions, and that is what I will try to do, giving some theories and possible changes that would help them through. This will be the third and last part of the thesis.

2 CREATION OF A PARK: DISNEYLAND PARIS AND THE OTHER DISNEY'S PARKS

Walt Disney created a new world by imagining animated cartoons that became impossible to not watch for kids. He decided to construct theme parks inspired by his animated cartoons for the pleasure of the fans. Indeed, there are Walt Disney's parks in America, Asia and Europe. The first one opened in 1955 in Anaheim, California (Designing Disney, 2018). Then, the second one opened in Florida in 1971: Walt Disney World Resort, which possesses Magic Kingdom, Epcot, Disney's Hollywood Studios, and Animal Kingdom (Disney World 2018). In 1983, the company decided to go in Asia by opening Tokyo Disney Resort (OLC Group, 2018). They discussed a long time to figure out in which country they will be implanted in Europe because of the love Walt Disney had for it (the animated cartoons having the culture from the European countries). They finally decided to do it in France, in 1992, by opening Disneyland Paris (Disney Holidays, 2018). Later on, they opened two other parks in Asia : Hong Kong Disneyland Resort in 2005 (Fickley-Baker, 2011), and Shanghai Disney Resort in 2016 (Disney History, 2018). We will concentrate on how a park is designed, by focusing on Disneyland Paris, the only park in Europe, and to figure the differences within the other Disney's parks of the world. It is important because when the Imagineers designed them, they wanted to recreate the feeling of "Disney Magic", a special and unique atmosphere for the people, and that it would be impossible to feel the same in an other one.



Map of Disneyland Paris – Radio Disney Club 2018

2.1 Main Street USA

The Main Street USA is a very important part of the park because it is the first thing the people will walk into. The first idea was to make it look like what knew Disney's creator when he was kid: Marceline, Missouri. The Europeans had a different vision of the USA than others. Indeed, Hollywood in the 20's was a facination for them, with the jazz, the cinema, the gangsters, and the birth of the industrial revolution. They wanted the *Main Street* to be a mix between Chicago and New York City, better and idealized by the hollywood films, with an upper train, a 360° cinema screen, big commercials, and limousines (Littaye, 2002, 27).

However, *Main Street* had to be calm and peaceful, keeping new ideas and enthousiasm. In the Imagineers' mind, the entire world would have appreciated dynamism, optimism and new ideas (Vanderbilt, 2018).

There is a myth, a legend about the *Main Street* that people do not know, but which is different from Disney's parks to another. Every building has a story, has details from the past time and has the name of people who worked for the creation of the park and those who have marked the life of Walt such as Erastus Taylor, who was a veteran from the american civil war and was telling stories to Walt (Williams and Denney, 2004, 353). The same occurs for the trains, that were the passion of Walt. Because of all this, *Main Street USA* gave a big importance to its inhabitants: the dentist, the firefighters, the tailor, the surgeon, the gardener, and the chief editor. 90% of the accessories were coming from their time (Disney Gazette, 2007).

Concerning the music, the *Main Street* has to remind of America at the beginning of the 20th century because it was the only music the Europeans knew. The morning, the music was welcoming and sweet, and the evening, it was more dynamic for the people loving the night life. Because it was a success, the Walt Disney Company decided to put the same music as the one in Disney California and in Disney World. (Littaye, 2002, 43)

The costumes were coming from shows of Broadway and other musicals. They looked like those in New York and Chicago from 1890/1900 (Scordia, 2018), more urbans than those in the other parks. They were blue, white and red to represent France.

There is no glass covering the *Main Street*, unlike at Tokyo. *The Liberty Arcade* tells the story of the Liberty Statue because it is showing how close France and USA are. The

inspiration of it comes from Jules Verne and Leonardo da Vinci (Fantasyland, 2009).

In this area, there is the *Walt's restaurant*. The Europeans did not know him and his story like the Americans did, that is why there are pictures, memories in it. Moreover, every room of the restaurant is representing one land of the park (Frontierland, Adventureland, Fantasyland and Discoveryland).

2.2 Frontierland

Frontierland represents the wilderness of the West America. The French were dreaming about the stories of cowboys, indians, the desert of the Far West because it was so unusual to Europe.

The Big Thunder Mountain is the center of the land. The inspiration came from the Monument Valley and from Bryce Canyon (Dallin, 2016). The purpose was to attract the people with strong visual elements as the center, like the *Castle of Sleeping Beauty* in Fantasyland.

Tony Baxter, the imagineer who created the first version of this rollercoaster in Disney California in 1979, said that it did not matter where the customer was, they will always see the moving trains, and that is what was giving life to this land (O'Brien, 2015, 43).

Pat Burke, the property man for the Disneyland of Paris, California, Florida and Tokyo had to face some problems. In California and Tokyo, there were earthquakes, and in Paris and Florida, there was a lot of rain and humidity, so the techniques had to be different.

The Phantom Manor is related to the *Big Thunder Mountain*. The history tells the rich owner was also possessing the mine and his daughter wanted to get married. Her fiancé wanted them to go somewhere else, and her father got mad. In the ride, the fiancé is hanged, the daughter is furious and the ghosts are inviting the visitors to join them. There are just a graveyard and a ghost town left. *The Phantom Manor* has a San Francisco style with a ruined facade. It has 92 different characters (Disneyland Paris, 2018). The the end of the ride, there is another graveyard. It is very interesting to know Disney has imagined every detail to make it look as a real city with a proper history.

In Frontierland, there is also *the Rivers of the Far West*, that are here to sweeten the land, and they surround *the Big Thunder Mountain*. The boat on it is called "Molly Brown" (Disneyland Paris, 2018), an honor for the famous survivor of the Titanic.

In the land, there also is the *Lucky Nugget Saloon*, which is a theater. There is also a story, which is that the owner Diamond Lil, the provocative american actress, was having enough business sense and feminin charm to establish herself in Thunder Mesa (the city where *Big Thunder Mountain* and *the Phantom Manor* are) (Littaye, 2002, 110). The stage is the same as the one in the "Golden Horseshoe Revue", the restaurant of Disneyland California, except that it is paint in white there, and the one in France reveals the warmth of beers and bourbon. The astmosphere is full of american westerns, sounds of horses, kids and dogs. Since 1997, the decorations change on each Halloween (Littaye, 2002, 120).

2.3 Adventureland

Everything is mixing in this land; Africa and Asia, with cinema characters and characters from novels, the stories, legends and mysteries of real lands. At first, the concept of a generic jungle was imagined by the imagineers but declined by Disneyland California. For Disneyland Paris, they wanted to have a wider theme by incorporating Africa, with its arid deserts and tropical islands of the Caribbean (Chris Tietz, artistic director of Adventureland). The first inspiration was the "Tales of the Arabian Nights" (Strodder, 2012, 44).

At the departure of the land, people can see the legendary Orient, because of the immoderate tastes of the European for the middle East exotism (that is why there are *Aladdin* and *Babar* and *the Adventures of Badou* rides). The Americans use the comparison as their view of exotism as a little french village, and the French have in Disney the restaurant *Hakuna Matata* (The Lion King), *Indiana Jones and the Temple of Peril*, and *The Jungle Cruise*.

The Adventureland's jungle was a real challenge because the vegetation had to look real, but it was harder to do it than the one in Florida. Indeed, the winter in Paris is tough, and the importation of tropical vegetation is hard as well. The solution was given by the responsables of landscaping of Disney California, Walt Disney World and Tokyo Disney; the Imagineers grew a forest of bamboos which surround the land. Normally, bamboos

come from the snowy mountains of China, but people associate them with tropics (Fantasyland, 2008)

Indiana Jones (George Lucas) is the first ride having a looping in a Disney's Park. The inspiration came from the Hindu temples from South India. The style is from the Palavian empire, the temple of Mamallapuram (Littaye, 2002, 134).

Chris Tietz explains that in the other parks around the world, Adventureland does not have a strong visual element like *Big Thunder Mountain*, the *Sleeping Beauty's Castle* or *Space Mountain* (Fantasyland). In Paris, the Imagineers took the *Swiss Family Treehouse* and raised it on a hill to make it the center point of the land, the visual element that we can see from everywhere. The big tree is about 21m high and 6.5m over the water. It is a *Disneyodendron semperflorens grandis* with 300.000 artificial leaves (Strodder, 2015, 17).

For Disneyland, every detail matters and has to be credible. The creation of Adventureland was very close to the one of Frontierland (in the USA, *Tom Sawyer Island* is the center of Frontierland), but the theme did not fit for the Europeans as being the center because they did not know Tom Sawyer well enough, that is why they changed it to have *Big Thunder Mountain* as the center of Frontierland (Littaye, 2002, 142), and added two rides of Disney California in Adventureland which are the *Pirate's Boat* and the *Skull Rock* (Strodder, 2012, 158). Those two were removed in 1983 in California and that's why the Imagineers wanted to put them in Disneyland Paris.

The parks were designed to be in line with people from the countries the Disney Parks were implanted and that is why the Imagineers had to think about every single detail and to do some changes regarding the culture of the countries, so the people would understand better and feel more comfortable.

In this land, there is the most famous and popular ride of the Disney's parks; *Pirates of the Caribbean*. It was first opened in Anaheim, California, in 1967, and the latest under the watch of Walt (he died in 1966) (Coleman, 2017). The costumes of the pirates come from a former costume shop of London, all dating from before 1900 (Littaye, 2002, 158). In the ride, at some point, there are two pirates fighting in a duel; it only exists in Disneyland Paris. At one moment, the visitors can also see the *Blue Lagoon* which is the restaurant of this ride, which will really make the guests feel they are part of the pirates' adventure, with food from the Caribbean's culture.

The Audio-Animatronics are made with a technology that combines and synchronizes voices, music, sonor effects and movements of the characters. The first ones were made in 1963 (Littaye, 2002, 175). Wathel Rogers who was the father of this technology was equipped with a harness that recorded his movements (Johnston, 2014). In 1969, with the informatic technology, the movements were recorded on informatic disks (DACS). The animators were able to manipulate the characters thanks to buttons; the facial expressions and corporal were better. In the late 80's, it continued improving, with one second of action asking for 8 hours of work (Hephaestus, 2011, 57).

The Audio-Animatronics play a really important role in the parks as they are in each attraction and waiting lines. They have to be as real as possible so the visitors feel truly immersed and amazed.

2.4 Fantasyland

Fantasyland is a world of fantasies like its name suggests it. It is about dreams and Disney's animated cartoons. Tom Morris, the artistic director of Fantasyland, said that in this land, the characters of Walt Disney and their universe come to life (Littaye, 2002, 181). The imaginary land is welcoming, reassuring, astonishing and have a lot of different bright colors. The trees and the landscapes have the shapes of animals.

In the american parks, the dreaming atmosphere is a little european village, located on the borders of a castle (this castle evokes those of the Loire, of Alsace and Bavaria) (Smallwood, 2017). The Imagineers knew the same won't work in France. They had to reinforce the mythical elements of the classical movies from Disney with *the Beanstalk*, *Alice's Cups*, *the Labyrinth*, *the dragon* and *the carousel* (Littaye, 2002, 181). Thanks to the tribute to the animated european cartoons, the visitors can discover Germany, Italy, England, France, Holland and Belgium. The ride *it's a small world* gathers all the countries of the world.

The center of the land and of the park itself is the *Castle of Sleeping Beauty*. The Imagineers thought at the beginning they could do the same as the one in Disney California or the one in Magic Kingdom (Florida), but the inspiration of them was too based on the french castles so they were thinking about doing a futurist tour (Audren, 2018). At the end, they thought the best was still to do a fancyful french castle, made out of fairytail with a dragon at the entrance. The inspiration came from the Mont St Michel

and 20 other castles. Indeed, the Imagineers liked the Chaumont's windows and moats, Chambort's pillars in a spiral, the St Severin Church in Paris, and Azay-le-Rideau's thinly towers (Paris City Vision, 2018). Inside, there is the music of the Tchaïkovski's ballet. The principal stained glass changes regarding the light, like if it was magical. The stained glasses were made by Pau Chapman, the English specialist who worked for the Queen of England and who restored Notre-Dame de Paris (Littaye, 2002, 189). To do the Castle, workers from all over Europe had to come because the Americans did not know the techniques they had to use. The towers came directly from Italy. Inside, there is the dragon and *Merlin the Wizard's shop* (Littaye, 2002, 194).

Inside the land, the visitors will also be able to find the *King Arthur's Sword*, and the *carousel* dedicated to the Knight of the Round Table: Lancelot. At Tokyo Disney, the company figured the old people couldn't ride the horses of the carousel so they created big tanks (Littaye, 2002, 197). They did the same at the one of Disneyland Paris. There is also the *Cinderella's Restaurant*, where princesses will appear during the meals for the children.

Concerning the dark rides, (dark because there is few lights), *there are Pinocchio's Daring Journey, Snow White, Peter Pan's Flight. Pinocchio's* is almost the same in the USA. Its restaurant *La Bottega di Geppetto* is between two lands; in Fantasyland, the inside looks like the Bavarian houses and in Adventureland, there is the sinking of the boat (similar in Disney California) (Disneyland Paris, 2018).

What is very interesting about those cartoons is their country of origins: *Snow White* comes from Germany, *Peter Pan* comes from England (the accessories came from the secondhand trades of London), *Beauty and the Beast* from France (Listal, 2011).

Tom Morris explained that the peaceful side of Fantasyland was missing and he realized the Imagineers did not include the universe of Holland and Belgium. That's why they added *Les Pirouettes du Vieux Moulin, The Land of Fairy Tales* and *Casey Jr. Circus Train* rides. In those three rides, the visitors could see the big classics of Disney with a little world trip, which was Walt's idea. A lot of countries had to be represented for the occasion: *Night on Bald Mountain* and *Peter and the Wolf* were coming from the Eastern Europe and Russia, *Snow White* from Germany, *Beauty and the Beast* from France. Disneyland Paris did not take an American voice because there were too many nationalities so the people will hear just musics during the ride (Disneyland Paris, 2018).

The ride that Walt made with all his heart was *it's a small world*. It was created in 1964 for the NYC World Expo on demand for UNICEF (Unicef, 2014). The famous music was made by the Sherman brothers, who did also the ones of *Mary Poppins*, *The Adventures of Winnie the Pooh* and *of the Jungle Book*. It's the London Philharmonic Orchestra which recorded it, as well as the voices of children from all around Europe. The walls have been removed for the ride because Walt wanted a vision of a world without borders (Tad, 2016).

2.5 Discoveryland

Tim Delaney, the artistic director of this land, wanted to develop a place out of time (Littaye, 2002, 237). He reunited several versions of the future and Discoveryland still needed to have a feeling of the past. Concerning the vision of the future, the Imagineers decided to take those of Jules Verne and H.G. Wells, Leonardo da Vinci and George Lucas, so the visitors would have a great perception of it, some sci-fi and a universe out-of-time. The fifth land of Disney, Tomorrowland, never worked in the USA because trends were changing too fast, so the Imagineers did not want to do the same thing for Disneyland Paris. The first of them opened in the 50's in California, as the technology was still making people dreaming, but Tony Baxter explained that there were the dreams which were making the imagination growing (O'Brien, 2015, 73). The Imagineers replaced the concept by creating Discoveryland, and it worked so well they even exported it in California and Florida.

Tim Delany explained that in Discoveryland, they wanted to set a lot of visual references which would represent the extraordinary journeys and the exploration of dreams (Designing Disney, 2018).

There is the submarine *Nautilus* of Jules Verne (coming from Walt's "20.000 leagues under the sea") with the decoration of Walt's film. The big organ was at first the one of the *Haunted Mansion* of Disney California, but the Imagineers took the original one from the film (Disney Parks, 2014).

Space Mountain: from Earth to the Moon (inspiration from Jules Verne), is the center of Discoveryland. It is an impressive rollercoaster with an aircraft catapult. Its legend was that it was the volcano under it which was giving the power to be that fast. The boarding

area was inspired by the "Baltimore Gun Club" (Jules Verne). There are a lot of neons in this land to represent the energy of new ideas and of the imagination (Littaye, 2002, 269).

Orbitron is another ride of this land. The Imagineers went to the museum of Arts and Crafts in Paris, looked at a lot of planetary models of the past centuries and a lot of ancient scientific and astronomic objects to imagine how they could construct it (Chronique Disney, 2017). The comics from Buck Rogers and Guy l'Eclair of the 30's inspired its rockets. Ray Bradbury, known for its *Martian Chronicles*, suggested himself that for *Orbitron*, the planets should move in the opposite way than the rockets, so it will feel like the speed is twice more important (Chronique Disney, 2017).

Tim Delaney explained as well that in each land, the plants and rocks in the landscapes are part of the history. The impressive rocks of West America are in Frontierland, the sculpted and fantasist trees that represent the magic are in Fantasyland, the threatening and mysterious rocks are in Aventureland and the rocks with crystalline shapes are in Discoveryland (Littaye, 2002, 272).

Another impressive ride is *Star Tours*, which represents the universe of Star Wars and has some particularities in Disneyland Paris; some objects have been offered by George Lucas himself. Indeed, one Speeder Bike was offered to Disney-MGM Studios in Florida (now is called Disney's Hollywood Studios), while two have been offered to Disneyland Paris. Moreover, Disney hired Anthony Daniels, the original voice of C3PO to record the french dialogue. They also recovered the computers that controlled *Pirates of the Caribbean* of Disney California, which were supposed to go away, and put them in the droids' room of *Star Tours* (Littaye, 2002, 276).

Autopia was the one constructed to be in between the past and the future; the Imagineers thought the 30's had the most interesting vision of the highways of the future, those in the "Popular Science" magazine. They got the inspiration from Walt's "Magic Highways" as well, done in the 50's. In California, the ride has a lot of turns and in Florida, it is more simple and less extraordinary. They wanted to have the perfect combination of both in Paris, and that is what the Imagineers did: it is big and quite complexe. Steve Brooks made them do futuristic cars that wouldn't age easily concerning their design (Littaye, 2002, 281).

Finally, the land has its own magical cinema, *Cine Magique*, where "Honey, I Shrunk the Audience" had been invented just for the Disney Parks (1998). Before that, it was the

"Captain Eo" which was showed, with Michael Jackson. They had to construct a mobile platform which was weighed 100 tons, at 6m depth (Littaye, 2002, 284).

2.6 Disney Village and Disney's Hotels



Map of Disneyland Paris Resort – Overseasattractions 2018

Michael Eisner, at the time at the head of The Walt Disney Company, did not want any global or realistic theme for the hotels which were outside the park. He wanted to separate esthetically the outside and the inside, so the park would be the center of the amazing entertaining place that is Disneyland Paris (Designing Disney, 2018). *Disney Village* and *Disney's Hotels* look more urban than the lands in the park, but they aren't less fascinating. Wing Chao, the architecture responsible of Walt Disney Imagineering, decided after long and many discussions that the theme would be the legacy of the American cultural to be different from the European surroundings. A study has been made to know what the Europeans were more likely to visit in America, so the Imagineers would know which inspiration to take. It turned out the places they liked the most were New York City, New England's region, the natural parks and the American West (Littaye, 2002, 287).

The Disneyland Hotel has its rooms giving view on the Magic Kingdom, which is the dream of pretty much every child. Eddie Sotto, former Senior Vice President of Concept Design at Disney Imagineering explained they had to avoid that *Main Street* would feel

too small in comparison to the size of the building. The solution was to put enough details to make guests think the hotel was bigger than what it really was. It is one of the biggest hotels of Europe but people can't see it (Disneyland Paris, 2018). The facade is pink, the roof is red so it can be seen from far and the visitors will be able to say : "there it is, we are there". There is a huge clock with Mickey Mouse on it in the front. Tony Baxter added the *Fantasia Gardens*, inspired from the big artistic themes of the animated cartoon "Fantasia": the water, the fountains and the gardens. In the *Disneyland Hotel*, the rooms have some details, such as *Snow White* decorating around the mirrors, the overhead of the bed having *Sleeping Beauty's Castle* on it, and *Tinker Bell* on the top of the TV.

Then, near the park is located the *Hotel New York*. Michael Graves, an american architect and who had to design the hotel, explained that from an esthetic point of view, the problem was, giving to the theme, that he had to use skyscrapers but the size of the building was limited. He had to stylized them. The Imagineers had to divide the hotel in areas helping the visitors' orientation, while showing the New York's districts : Grammercy Park, Midtown, Brownstone, Rockefeller Center's Rink (Designing Disney, 2018).

The *Sequoia Lodge* was designed by a French architecture : Antoine Grumbach. For him, the nature was what was bringing the USA and France together, but in the USA, the big natural parks are what representing the nature, and that is why he decided to create lodges built out of natural materials: stone, wood, copper and a lot of trees (Lévy-Willard, 1996). The hotel is a tribute to Frank Lloyd Wright, to the "Prairies Houses" and to the Craftsman's architecture style of the Green brothers (Fantasyland, 2008). The lodges are surrounded by enormous sequoias from British Columbia.

The *New Port Bay Club* is located next to the lake. It is a tremendous hotel, the first thing people can see when leaving the "A4 highway". It is one of the largest hotel in Europe, with more than a thousand rooms (Disneyland News, 2018). It was one of the similar idea with the hotels *Yacht* and *Beach Club* in Walt Disney World, Florida. The inspiration came from the Marina Hotels (end of the 19th century), explained Robert Stern. Those big hotels were making people remember the structure and the autarky of cruise boat (Designing Disney, 2018).

The Hotels were made to magnify the magic of Disney by making them as real as possible, close to what people were thinking about America, like the ones of *Cheyenne* and *Santa Fe* which are located on either sides of the border of the river called "Rio

Grande". Robert Stern wanted to represent the West and the legends the French admired, the West of the movie "High Noon" with Gary Cooper and Grace Kelly (Littaye, 2002, 302). The Imagineers created real movie sets and a real village. The buildings are all the same except the one at the center, which is having a different painting. Michael Eisner said most of the Disneyland's hotels had a clear theme. *Santa Fe* was probably the most abstract one and was inviting to the controversy, which was voluntary (Designing Disney, 2018). *Santa Fe* was a tribute to the route 66, with trolleys, indian tracks, planes in the sky, a trail of artifacts along with rusting cars imported from Albuquerque, New Mexico, and smashed satellites. There is also a rattlesnake, a neon roadrunner and cactus under glass (Littaye, 2002, 305). The trail of the monuments reunites landscapes and shapes that look like an abstract architecture, such as the Monument Valley, while the legends trail gathers symbolic buildings of the West. There is a water trail as well, and a tribute to the cinema, with big screens of the drive-in (classical image of West America in the 50's and 60's), with Clint Eastwood on it (Hello Disneyland, 2018).

Finally, the *Disney Village* is the big entertaining center of Disneyland Paris by night, and has several contrasts, as Michael Eisner wanted. The role of the lights, along with the location of the railway station, with its steel columns (there are Disney's essence for the architect). It is a very enlightened place to face the dark sky of Paris. There is a mesh made of lights representing Los Angeles seen by plane (Designing Disney, 2018). The Imagineers respected the wish of Walt Disney who was saying "I can never stand still. I must explore and experiment. I am never satisfied with my work. I resent the limitations of my own imagination" (Gabler, 2006, 63). Inside the village, there is a show the visitors can see : *Buffalo Bill's Wild West Show*, a dinner show inspired of the real one which was produced in France at the World Exhibition of 1889 (Littaye, 2002, 314). Different restaurants of different themes are also available such as the *Rainforest's Cafe*, with fake animals moving while people are eating.

In 2007, Disney decided to open two rides from Pixar, the company they bought in 2006 (La Monica, 2006) to get a bigger audience : *Crush's Coaster* (Nemo) and *Cars Quatre Roues Rallye*. Then, the face of the park totally changed in 2008 with the opening of one of the most iconic ride of the Disney's Parks : *The Twilight Zone Tower of Terror* (Disneyland News 2018). It is the resort's tallest ride and is on the "Hollywood Boulevard" with a californian style, and has been designed in a way that people wouldn't experience it twice the same, as they couldn't predict the falls (Martin, 2017). *Rock'n'Roller Coaster with Aerosmith* is also one of the most iconic ride of the Disney's Parks, where the musical experience is getting along with the powerful train going at 100km/h, neon lights and smoked atmosphere (Disneyland Paris, 2018). Those two rides are in the other parks of Disney across the world, but the rest of the Disneyland Paris' Park is different and unique, except the "Toy Story Playland" that exists in Disney Hong Kong and currently in construction at Hollywood Studios in Orlando (Martin, 2018). It includes the rides *Slinky Dog Zig Zag Spin*, *Toy Solidiers Parachute Drop* and *RC Racers*.

Walking in the Walt Disney Studios Park do not really make people feel they are in Disney, but more in Hollywood, exploring the magic of the cinema industry, except the creation of the new ride of 2014 *Ratatouille: L'Aventure Totalement Toquée de Rémy* (Disneyland News, 2018), with an all new 4D experience with polarizing glasses, the mix of real sets with relief projection, sensory effects, water projection, warm and cold feelings (Disneyland Paris, 2018). Walt Disney explained Disneyland would never be over and will always evolve as long as the imagination will be present in the world (Heaton, 2016).

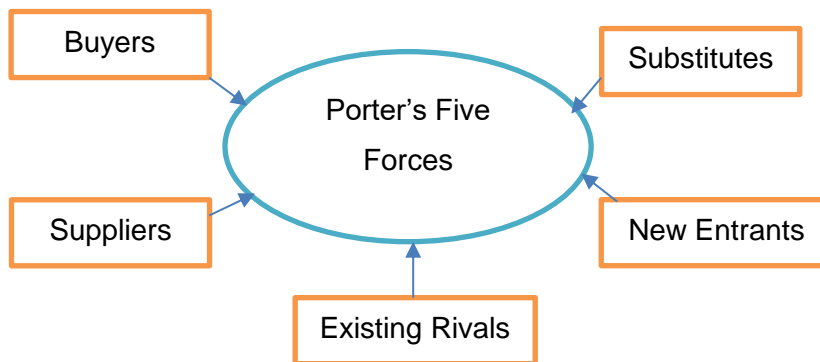
The creation of a Disney's park is very complex, as the Imagineers have to think to every detail so the visitors can be amazed by the magic. The hotels from Paris are very different from one another but each have the same theme: America. The Europeans were intrigued by the continent and were dreaming about it, so the parks made these dreams coming true by adding elements from Disney's animated movies. The two parks are also different from each other and the Studios have only few elements of the cartoons, as it focused more on the movie industry of Hollywood. Disney managed to create an atmosphere unlike any others, and that is what people fell in love with. From the cartoons guests have watched until the fairy tales they are able to live in the parks, and thanks to their design, the parks have something special that others have not: the "Disney Magic".

3 COMPETITION

There are a lot of other parks of different brands, but Disneyland's main competitors in America are Six Flags Entertainment, Cedar Fair, Comcast and Universal Studios (Kyle, 2018). The competition takes place mostly in America, as in Europe or other parts, they do not have as big competitors as in California or Orlando.

The universe of Walt Disney has been here for a long time now, but it has still some competition, which is getting tougher, as the attendance of Disney's Parks was down for the first time in a decade, and as Universal's attendance was up 14% in 2016 (Tuttle, 2017).

3.1 Porter's Five Forces



Porter's Five Forces Theory

Porter's Five Forces is a tool "to determine the long-run profitability of any industry has shaped, and to govern their profit structure by determining the economic value they created" (Porter, 2008). Indeed, this tool is really helpful when it is about to adjust the strategy of the company for the future. Competition is not about who is the biggest but who is the most profitable. It is about the buyers, the suppliers, the substitutes, the new entrants and the existing rivals. When each of them are understood by the company, it will be able to have better predictions, to create a better competitive strategy and to increase its profit (Porter, 2008). Those Five Forces will be explained for the Walt Disney Company.

As Disney is too well established in customers' minds, they won't be likely to decrease the parks prices. In the contrary, they have been increasing the tickets' prices throughout the years; they were up to \$3.50 in 1971, \$46 in 2000, \$82 in 2010, \$115 in 2017 (All Ears, 2018). Their buyers are pretty much anyone who is willing to pay the price and Disney's big competitor Universal has almost the same.

Concerning Disney's suppliers, the company was recognized for Supplier Diversity Efforts by the Asian Business Association – Los Angeles (The Walt Disney Company, 2017). It helped the teams of the suppliers to find innovative, cost-effective and high-quality solutions to achieve Walt Disney's business goals. Their work with suppliers were very diverse such as working for educational events, supporting some supplier organizations, matching potential suppliers with sourcing and procurement teams at Disney, ABC, ESPN, Marvel, Pixar and Lucasfilm (The Walt Disney Company, 2017). As the vice president of Multicultural Initiatives for the Walt Disney Company said; "diversity and inclusion are important drivers of innovation and help us to identify and work with suppliers who deliver world-class solutions for our businesses" (The Walt Disney Company, 2017). Since Disneyland Paris opened in 1992, the company has bought more than 2.4 billion of euros of good and services from hundreds of European suppliers (Sylt, 2018). Their suppliers are from all over the world and it makes it magical.

The threat of substitution is small but not non-existent, as they are very unique with their cartoons and stories behind each rides and lands, but Universal has also quite big stories behind *King Kong*, *Jurassic Park* and *Harry Potter* for example. It is quite tough to reproduce the Disney Magic, as it has been there for a long time and was built on different characters and classics that remain unique.

The threat of new entries in the market could appear. A new park coming on the market would need a totally different style that will attract people, but Disney and its competitors have too much money and are too well established to compete with them. However, this threat would reduce the profitabilities and the company will have to spend more.

Their rivals are Six Flags Entertainment, Cedar Fair, and Universal Studios's owner Comcast. They propose a great quality of entertainment as Disney's, they do attract customers, and the competition is tough. However, in 2014, Disney's theme parks attracted more than 134 million visitors, which was twice more than the next theme park operator (Best, 2016), and had a revenue of 52.46 billion of dollars in 2015 (Best, 2016). Disney can not increase its prices, as Universal has almost the same and is attracting

too much people to risk to be really more expensive than them. It is reducing the profitabilities.

3.2 Six Flags Entertainment

The first park opened in 1961 in Texas (Six Flags, 2018). Its creator wanted a new form of family entertainment by making large parks close to where people were living, as well as convenient and affordable, cheaper than Disney and Universal. He created the regional theme park industry (Hoovers, 2018). That is why they have now parks all over North America : Canada, USA and Mexico, and they also have one in China, one in United Arab Emirates and one in Saudia Arabia.

Moreover, they have been able to sign licensing agreements with DC Comics and Warner Bros (which means they can do rollercoasters with all the favorite DC's heroes such as Wonder Woman, Batman, Superman) (License Global, 2018). Disneyland had no other choice but to buy Marvel because it would have been impossible to face them unless they had their own superheroes because of the trend of the moment (Romano, 2015). It reduced Disney's profitabilities because of the price they had to pay to make their Marvel's superheroes against the DC's superheroes, but Disney also decreased the threat of a substitute to keep a competitive edge for its parks.

Indeed, Six Flags Magic Mountain opened *Justice League Battle for Metropolis* in 2017 (Barrera, 2017) which is a multi-sensory game experiencing wind, fire, fog and other special effects as the visitors will fight in the same team as their favorite DC's superheroes (Six Flags, 2018). It looks like the Disney's ride *Buzz Lightyear Laser Blast*.

3.3 Cedar Fair

Cedar Fair is the direct competitor of Six Flags, because it wants to "become the place to be for fun, by providing premier regional entertainment of breadth and scale" (Cedar Fair, 2018). They have 11 parks in the United States of America and one in Canada (Cedar Fair, 2018), including Knott's Berry Farm in California which is really appreciated by people who sometimes like it more than Disneyland California.

Indeed, the park has *GhostRider*, the longest wooden coaster of the West Coast of the US (Knotts, 2018). They also have dark rides like Disney with its Scooby Doo-themed

haunted dark rides. The strategy the CEO decided to use for this Amusement Dark vision was to mix the storytelling and the social interaction together, on traditional topics such as pirates, dinosaurs, dragons, cowboys and indians, and to make friends and families compete against each other (MacDonald, 2015).

Also, the CEO mentioned the parks have still some empty spaces, meaning they have special plans for the future (MacDonald, 2015). They do not have as much budget as Universal of Disney and have to do themeless parks, but as they are specialized in families entertainment with unexpensive prices, they do not have the possibility to be the top leaders against those big companies. They have a lot of Water Parks and could be a threat of substitute for Disney because of their empty spaces for their parks.

3.4 Comcast and Universal Parks & Resorts

Comcast is a big media company, which competes against the Walt Disney Company. It has bought NBC, and Universal Parks & Resorts being the subsidiary of NBC, this acquirement made Comcast the direct competitor of Disney's parks (Reuters, 2011). The biggest parks are in California and in Orlando, and they also have one in Japan, one in Singapore, and had been the owner of one in Spain in the past, which is now called PortAventura World (Hopewell and Geitz, 2004).

Universal Studios' Hollywood started when the founder Carl Laemmle opened his own Universal city ranch in 1915, so the people who wanted to see his outdoor movie studio and watch the filming could, almost for free. He decided to raise the interest of people concerning the film industry (USA Today, 2018). The Studios had to close when the sound appeared in movies, but it reopened in 1961 (Niles, 2018). Then, Laemmle decided to start his own *tram tour*, and this is how Universal Studios Hollywood was created in 1964.

More activities were added such as a western show, a makeup demonstration, and a walk through a star's dressing room at the time.

The competition was hard though, with Disney's Hollywood Studios, and its renown of its first park in Anaheim, California. It had to be cheap because of it, using the competition pricing strategy at the time, where the tickets were less expensive than Disney's (Entertainment Designer, 2011).

Universal got bigger throughout the years thanks to the movies such as Jaws, King Kong, Jurassic Park, and Harry Potter. They were earning a lot of money, even if they were spending a lot, thanks to the movies and to the entrance in the park, but were just covering their costs, keeping them low while adding more entertainment for visitors (Niles, 2013).

They are now a real competitor facing Disney, having a park in Orlando, Florida since 1990, making the challenge even harder for Disney World. The location was chosen only to compete against them (USA Today, 2018), attracting more people in the same area because of the presence of two big entertainment parks close to each other with the 4 parks of Disney World, Universal's Studios and Islands of Adventure. The treat of rivalry here is very existent.

Universal Studio has indeed new amusement rides that fans really want to try, creating the world of Harry Potter and others, and having the "world's most faithful translation of movie to theme park ride ever" which is the Jurassic Park's (Entertainment Designer, 2011). They are now facing the competition with prices quite similar to Disney's.

The real fight between the two leaders of the market began in 1981, when Universal needed a company partner for their project to build a studio at the Sunshine State. They felt Paramount Pictures as being a potential partner and when they wanted to work together, Michael Eisner was the one running the show there, so Paramount allied with Disney, and in 1989, Disney's Hollywood Studios opened its doors. Universal felt like its idea was stolen and opened a year after Universal Studios Florida, with the challenge to attract more people (Green, 2017), with Disney as being more seen like a theme park and not as a production company like Universal.

They created another park which opened in Japan in 2001 (USA Today, 2018) and has become one the most popular park in the country, making them the want to expand the network in South Korea, Singapore and Dubai.

Universal Studios Hollywood is doing TV Commercials, presenting its new rides, and people are really interested in its *studio tour*, where they can go behind the scenes of their favorite movies and series such as Desperate Housewives, Ghost Whisperer, 90210 Beverly Hills, and experience scenes of the movies Fast and Furious, King Kong, Alfred Hitchcock's Bates Motel and more (Universal Studios Hollywood, 2018).

Indeed, having rides such as *Terminator 2*, *Hercules&Xena*, *Wizards of the Screen*, *Shrek 4D*, *Men in Black: Alien Attack*, *Back to the Future* and *The Amazing Adventures of Spiderman* at the beginning was pretty hard to compete with, but Universal has raised the level by creating the "World of Harry Potter", constructing the *Hogwarts Express* (Harry Potter's train), linking Universal Studios Florida where the departure is from the King's Cross Station in London, and Universal's Islands of Adventure where the visitors will be able to discover Hogsmeade Station (Universal Orlando, 2018). There, people will see Hogwarts as it is in the movie, and able to experience thrilling rides, such as *Harry Potter and the Forbidden Journey*, an attraction with 3D effects on wraparound screens and animatronic characters (Martin, 2016), and *Flight of the Hippogriff*, a junior rollercoaster (Universal Studios Hollywood, 2018). There is also the *Three Broomsticks*, the special tavern in the Harry Potter movies with the famous "Butterbeer".

On the other side, in Hogsmeade (Universal's Islands of Adventure), there is the village where Harry Potter is always going before he goes to Hogwarts to buy some furnitures, like his magic wand: the Diagon Alley. The park offers interactive wands places, where people who bought a wand from *Ollivanders* can cast spells themselves by speaking slowly and waving their wand at a window, the stone walls or the back alley and as a result, they can watch the snow falling, the overflowing water (OLC Group, 2018). They also can shop for sweets at *Honeydukes* and dine at *Leaky Cauldron*, like if they really were in the movie. The recent ride takes place in the bank *Gringotts*, where a dragon is on a top of it, spitting fire: *Harry Potter and the Escape From Gringotts*, a riding past massive 3-D projection screens, a combination of real and special effects (Kohler, 2014).

Universal used to have a King Kong attraction which opened in 1990 but closed in 2002 (Fox News, 2016). They have recently opened *Skull Island: Reign of Kong*, which is one of the longest ride Universal has ever created (Fox News 2016). As people can read in the comments of the official Universal's webpage, the queue makes it creepy from the beginning, the ride is realistic and will give thrills for sure (Universal Orlando, 2018). It is located in Universal's Islands of Adventure, but there is a similar attraction in Universal Studios Hollywood, *King Kong 360 3-D*, which features the world's largest 3D projection installation ever produced (Universal Studios Hollywood, 2018).

Their goal is to make the theme parks as the most entertaining possible by bringing "popular culture's most compelling stories, characters and adventures to create some of the world's most innovative attraction experiences" (NBC Universal, 2017).

Indeed, they are really immersive, as they created authentic experiences based on cutting-edge television like *The Walking Dead Attraction*, which will make the visitors able to live a zombie apocalypse by replicating some of the show's most famous scenes (Visit California, 2018) with real-life actors in makeup, and animatronics zombies. It is obviously not recommended for the guests under the age of 13, as it feels so real (Universal Studios Hollywood, 2018).

An other authentic experience is *Race Through New York Starring Jimmy Fallon*, where guests are racing against Jimmy Fallon (television host of "The Tonight Show") in the streets of New York in a 3D motion-simulator (Universal Orlando, 2018), along with smells, drips of water and of course, the movements based on the screen.

They also have a show dedicated to the animals: *Animals Actors on Location*, where they perform audience interaction which the families will enjoy for sure (Universal Orlando, 2018), but Disney as a park dedicated for the animals: Disney's Animal Kingdom.

What Universal is really good at is its waiting lines where people can feel they are also part of the rides. Even some visitors who might not be able to do thrilling rides or simply do not like to do them can go into the queue just to look at the sets, such as Hogwarts School of Witchcraft and Wizardry where the characters in the paintings are really talking to each other like in the movie and the snow is falling in some rooms, the Gringotts Bank with its animatronics all over the place or Dumbledore's office, or the Gryffindor common room for the fans of Harry Potter (Niles, 2017) The waiting lines are worthy even for people who won't make the actual rides.

Moreover, they are really used now to use screens while having a rollercoaster, which mix 3D and reality, and will confuse the people doing them, with the feeling that everything is really happening to them, as if they were in the movie along with their favorite characters, by for example following Harry Potter on broomsticks while escaping a dragon on screen, and then going to a room where animatronics are in the "Forbidden Forest".

A strong advantage they also have is that Universal is really considered as a production company and there are real shows shot all the time, and visitors can actually see them such as "EXTRA", hosted by Mario Lopez and Tanika Ray. The VIP experience of the World-Famous Studio Tour in Hollywood includes the visit to actual sound stages where blockbuster movies and TV shows are filmed. It is really an advantage to be the

largest movie studio of the world (Universal Studios Hollywood 2018), and visitors may be able to spot a real movie star (Entertainment Designer, 2011).

The park also has the *Universal City Walk Hollywood* which is located near them, where people will be able to find a cinema, shops, restaurants such as the "Hard Rock Cafe", and some activities to do (City Walk Hollywood, 2018). It corresponds to *Downtown Disney*.

3.5 Disney's striking back

Attracting mostly families and being unbeatable for it, Disney had difficulties though to captivate the young adults as Universal does with its thrilling rides. Disney had no other choice but to strike back. With their rides judged as childish, regarding the answers of the surveys, and Universal attracting more and more people (attendance was up to 14% at Universal Studios Hollywood in 2016) (Tuttle, 2017), Disney had to change its main targets that were the children and families, unlike Universal which is mainly targeting fans of movies and thrills. In 2009, Disney bought Marvel Entertainment, where they wanted new possibilities with the Avengers (Clark, 2009). In 2012, they bought Lucasfilm to give Star Wars and Indiana Jones a new life, with more opportunities for their movies and rides, by promising new movies every 2 years for Star Wars (Le Monde 2012). In 2017, the Walt Disney Park Studios did a nocturnal lights show on this theme for the event "Season of the Force" on the front of the *Hollywood Tower Hotel* (Disneyland Paris Press News, 2017).

Lately, they bought the 21st Century Fox, which really upgraded their assets in the television industry, as it includes the 20th Century Fox, the FX Networks, the National Geographic Partners, Hulu, and access to the movie franchises like X-men, Avatar and Planet of the Apes (Ness, 2018). Having Hulu now will make Disney able to compete against Netflix, Amazon and Sony, as they want to join now the online streaming market (Ness, 2018).

The 21st Century Fox had a biggest proposition with more money before Disney but they decided to decline it, as they thought Disney would be a better company to deal with (Barnes, 2018).

Concerning the competition against parks featuring animals, as Disney has Disney's Animal Kingdom in Orlando, there is also SeaWorld near its location, but it is quite

different as the parks will propose to see different species; ones live in the water, the others in the wilderness.

Disney also has an Instagram account, counting more than 11million of followers (Instagram, 2018) and a page on Facebook counting more than 17million of likes (Facebook, 2018). The company is posting nostalgic pictures, upcoming events and movies. Finally, it has blogs focused on its parks where visitors can tell how was their experience, making customers feel central and likely to come back. The company posts about the attractions and what is going on in the parks.

Universal has around 1million of followers on Instagram (Instagram, 2018) and around 2million likes in Facebook for their parks, even though they have 8million of likes for their Universal Studios Entertainment page in Facebook (Facebook, 2018). They are doing quite the same as Disney but their competitor is still more loved on social medias, thanks to the nostalgia everyone is feeling about their animated cartoons.

Concerning the marketing part, Disney has always been really great with their advertisements such as the one of "Healthily Ever After", which uses characters to inspire families and children to eat healthier and to exercise more (Davis, 2016).

Indeed, the Walt Disney Company is really good at doing the promotion of the parks, making advertisements about magic and telling people that anything is possible. They are touching everyone with stories people can relate to and making them feel that every dream can come true. They have also done, of course, a lot of research markets, and are the only ones targeting people of all age (The Walt Disney Company, 2018). The parks were beginning to feel too old and only the kids were able to feel very close to Disney thanks to its animated movie. They have characters for every child depending on their youth. That is why they have bought the companies Lucasfilm and Marvel Entertainment to make a lot more people closer to them, and to touch an older audience.

In all of their videos, they are trying to catch the attention of people to see how magic Disney is and how it can inspire the kids that would like to be like its characters. Furthermore, before of the release of the movie "Jungle Book", they targeted an older audiences with an ad placement at the Super Bowl and a 3D preview in auditoria before the Star Wars movie (Davis, 2016).

They also asked the photographer Annie Leibovitz to portray Hollywood actors, actresses and singers, sports and dancers stars to portray the characters of Disney and

it really looks amazing: Jessica Chastain as Merida from "Brave", Jennifer Hudson as Tiana from "The Princess and the Frog", Taylor Swift as Rapunzel, Queen Latifah as Ursula from "The Little Mermaid", Olivia Wilde as the Evil Queen from "Snow White", Scarlett Johansson as Cinderella, Julianne Moore as Ariel and Michael Phelps as a merman, Beyonce as Alice from "Alice's Adventures in Wonderland", Jessica Biel as Pocahontas, Penelope Cruz and Jeff Bridges as the "Beauty and the Beast" and a lot more (Pinar, 2014). It began in 2009 and people love to see their favorite stars embracing the role of the characters from the animated cartoons they fell for (Disney Parks, 2011).

Moreover, they have done recently movies taking the animated cartoons as a model to make the animated characters alive with famous trending actors such as Emma Watson (Harry Potter) for Beauty and the Beast, Kristen Stewart (Twilight) for Snow White, along with Chris Hemsworth (Marvel's Thor), Alexander Skarsgård (True Blood) for Tarzan, Angelina Jolie (Tomb Raider) for Maleficant (Sleeping Beauty), Jungle Book with a new young actor and Cinderella starring Richard Madden (Game of Thrones).

They are not done yet, as they planned to do "Christopher Robin" (Winnie the Pooh) starring Ewan Mc Gregor, "Marry Poppins Returns" starring Emily Blunt, Colin Firth and Meryl Streep, "Alladin" directed by Guy Ritchie, "The Lion King" starring Beyoncé Knowles, "Mulan" starring Jet Li, "The Little Mermaid", another "Snow White", "Cruella De Vil" starring Emma Stone, "Peter Pan", "Tinkle Bell" starring Emma Ston, "Dumbo" starring Eva Green and Colin Farell, "Chernaborg", "Pinocchio", "Sword in the Stone" and "Lady and the Tramp" (Allocine, 2018). Indeed, Disney has planned those movies releases from 2018 to 2023 (Devoe, 2018) (Oswald and Acuna, 2018). Also, the Star Wars movies releases are promised every two years. By doing this, they will have opportunities to do more rides, more characters and people who will watch it to see their animated characters coming to life will want to go again in the parks to live it in an immersive way.

They are making the animated cartoons alive, and way less childish. Those movies can reach any age and will make people remember their childhood or their youngest times, but they grew up and have been witnesses of the technology and other skills the industry acquired throughout the time.

When it is about marketing, Universal is not so bad either. In fact, they decided to combine, alongside with NBC, the top 12 stars of "The Voice", and the actresses of "Pitch

Perfect”, to promote the show and the release of the third movie. They did a music video where they mash up the songs “Cups” (original song from the first movie “Pitch Perfect”) and “Freedom! ’90” (a song from George Michael which is present at the end of the movie) (Otterson, 2017). The senior vice president of marketing strategy and digital for NBC Entertainment, Jared Goldsmith, explained that it was a great example of a marketing partnership between NBC and Universal Pictures (ATT, 2017).

3.6 Disney’s upgrades

They already had good waiting lines, by for example creating a real Everest’s cottage, giving on the *Expedition Everest* in Disney World’s Animal Kingdom (Niles, 2017), and video effects in the caverns of *Under the Sea: Journey of the Little Mermaid* in Magic Kingdom, as well as *Pirates of the Caribbean* and *Indiana Jones Adventure*.

They however raised the level, like Universal, with the opening of *Guardians of the Galaxy: Mission Breakout*, in the former *Twilight Zone Tower of Terror*, with some Animatronics for Marvel’s upcoming movie (Inigo, 2017).

They also opened the new ride *Pandora: The World of Avatar*, with a queue beginning outdoors under the mountains of the Valley of Mo’ara from the film, caverns decorated with Na’vi art, and then indoors where the visitors discover the Avatar lab with a life-sized Audio-Animatronics Avatar (Niles, 2017).

They also changed the rollercoaster *Rock’n’Roller Coaster Starring Aerosmith* to receive the “Marvel Transformation” for the summer 2018, giving the spot to Iron Man and other Avengers (Disney Parks, 2018).

Disneyland Paris followed the movement by giving some changes due to its 25th anniversary, by redesigning some rides to be more current, like the one of *Star Wars* with its new film and the one of *Pirates of the Caribbean* to look more like the film (it did not look like it at the beginning). Furthermore, they renovated *Big Thunder Mountain, It’s a Small World* and *Peter Pan’s Flight* (Colinet, 2017). All those changes have helped boosting the attendance, the guest spending, and the hotel occupancy (Martin, 2018). The shows are always changing and there are different lights shows, especially when there is a special anniversary like the 20th one, six years ago. They did a lot of changes this time; the *Star Tours Experience* has completely changed because of the Star Wars movies, because it remained the same since a long time ago, and they have crossed

Space Mountain with *Star Tours*. Lots of people went to the big event to see all the changes. Indeed, they are pretty young parks (Disney's park and Universal Studio) and the parents know them since their opening, so when there are some changes like that, they go to check and try them, due to Disney's powerful marketing on its social medias and on TV.

They are now doing like the other Disney's parks by changing the rides for the Marvel's upcoming film at the Studios from June to September: "The Summer of the Marvels' Superheroes" (Disneyland Paris News, 2018), along with parade and animations featuring the characters of Spider-Man, Black Widow, Captain America and Iron Man.

The Walt Disney Company had a meeting with the French president Emmanuel Macron to elaborate a plan for 2018, which is to develop and modify on several years the Walt Disney Studios Park by creating three zones for Marvel, Star Wars and Frozen, adding a lake to connect them (Martin, 2018) and more shows and rides. This is the most ambitious development from Disneyland Paris since its opening in 1992 (Disneyland Paris News, 2018).

Disney keeps doing new events and changes to keep the visitors amazed. For example, in 2018, the Disney California Resort will welcome the "Pixar Fest", where a lot of characters and other surprises will come to the resort, as well as in the park, along with some of "The Incredibles", "Inside Out" and "Toy Story" (Disney Parks, 2017) characters. A new transportation will also come to the Walt Disney World Resort to connect Disney's Art of Imagination, Pop Century and Caribbean Beach resorts, Disney's Hollywood Studios and the International Getaway at Epcot, with the "Minnie vans" and "Disney Skyliner" (Wdw Info, 2018). Moreover, a Star Wars resort is planned for Orlando. Bob Chapek, Chairman of Walt Disney Parks & Resorts, said it was unlike anything that exists today, and people will become, as soon as they arrive at the resort, citizens of the galaxy. It is so immersive that the guests might be dressed accordingly to the movies. It will be a unique journey (Star Wars, 2018).

Disney isn't stopping there, with the plans to bring Marvel's characters to Disney's Hotel New York in Paris, creating a new table-service restaurant to eat above the Earth (in space) at Epcot, to bring the attraction *Tron* from Shanghai to Magic Kingdom in 2021, the new ride *Mickey and Minnie's Runaway Railway* for its Hollywood Studios, and Star Wars lands in construction which will open in 2019 in California and Orlando: *Star Wars:*

Galaxy's Edge with new attractions (Disney Parks, 2017). They are doing this to be as immersive as their main competitor.

Walt Disney World also have the park Epcot Center, with two distinct parts. One is reserved for the "Future World", with heaps of inventions created during the evolution of human history such as the different ways of communication and the space conquest. The other part is reserved for the "World Showcase", where 11 countries are represented, including France, Germany, China, Canada, Mexico, Italia, Norway, Japan, Marocco, England and the USA, where people can enjoy their local food, their architecture and history, along with some shops. People will be able to see famous monuments like the Eiffel Tower and the Forbidden City in China (La Floride, 2018).

All the "countries" in this park are gathered around a superficial lake. This is like a small world tour, that can be made in few hours, which is pretty impressive. Moreover, the people working in those places are native from the country they are representing. This part does not have any rides but proposes some short movies to present the country.

Disney has also water parks. In Orlando, they have two of them: Disney's Typhoon Lagoon Water Park and Disney's Blizzard Beach Water Park. The first one has a legend: it was created by the storm. Surfboards were projected into palm trees and boats were tossed around like toys, and that made waterways, rivers, rapids and slides (Albert, 2017). The other one is a water park which was themed after a ski resort according to the legend, along with ski lifts and snow, slalom courses, toboggan slides and iceberg walkways (Albert, 2017). It is very unusual to be with a swimsuit while surrounded by snow, and that is what makes the beauty of the park. The Typhoon Lagoon is better for adults while the Blizzard Beach Water Park is known as better for the kids (Albert, 2017). Thanks to the Floridian weather, it is always warm and nothing is better than going to the beach with some slides, and it is actually cheaper and not as crowded (Disney World, 2018). The visitors will be able to choose between those two whether they prefer going to the beach in a tropical paradise or if they are adventurous and want to be amazed by the fact of being in a swimsuit while looking at the snowy mountain and taking ski lifts.

Universal had no choice but to open its main waterpark Volcano Bay in 2017, which was Wet'n Wild water park in the years before (Kondolojy, 2015), bought to directly compete against Walt Disney World and to create the beginning of their empire (Orlando Informer, 2018). It is based on a fake volcanic tropical oasis with beaches, 18 water slides, pools and water coasters (Visit Orlando, 2018). People can rent cabana during their stay,

offering padded lounged chairs, complimentary fruit and snack basket to really feel on vacations (Universal Orlando, 2018). Of course, people can also stay in the resort and will have the privilege to go an hour before the opening, as in any other parks.

Both of Universal's and Disney's Resort are really beautiful but they also are really expensive, even though they allow guests to have Vip Passes that will cut the waiting lines to the rides into very short ones (Mumpower, 2017). While Universal has four hotels on-site, Walt Disney World has 25 which includes free transportation to the parks and extended park hours allowing the visitors to go there before the hours opening (Ruiz, 2017).

Concerning Disneyland's parks, only people who are located in their resort in a suite will have access to unlimited "Fastpass", which will reduce a lot the queue, due to the price, but people without the Resort's accommodation will be able to ask for 3 "Fastpass" per day, with special times according to the availability. Universal's Resort suites also give the advantage to receive a "Universal Express Pass", but they can also be purchased for the day (Orlando Informer, 2018). As the Express Passes are more expensive than the price of the park itself (depending on how many days visitors are staying), not a lot of people will possess the pass (Universal Orlando, 2018).

There is also a third and very recent way to do the queue for a ride: the "single rider" line. If people do not want to wait as long as the people in the normal waiting-line, they could go in this one. They will just do the rides with other people than their family and they will fill the wagons when a spot is available.

Regarding the price when it is about choosing one park amongst Universal's and Disney's, it is important to know that although Universal's Islands of Adventures and Universal Studios are connected by the *Hogwarts Express*, they are two individual parks where people need a different entry ticket. They have the biggest attractions in Orlando (Ruiz, 2017).

Walt Disney World is more diversified with 4 different theme parks: Epcot, Magic Kingdom, Hollywood Studios and Animal Kingdom. The ones who love Disney's classics will love to go to Magic Kingdom while those who like to travel will surely enjoy their time at Epcot. The principal contender of Universal's Studios is of course Disney's Hollywood Studios, and Animal Kingdom propose an *African Safari* and a *Lion King* musical production (Ruiz, 2017).

Disney is cheaper than Universal (tickets from 102\$) (Disney World 2018), and the more the visitors go and for not much more money, they will be able to access the four parks (Disney World, 2018). Universal is more expensive than Disney (tickets from 115\$) (Universal Orlando, 2018) but have interesting packages (175\$ for the both Universal Studios and Islands of Adventure) (Universal Orlando, 2018). The prices are very important in the visitors' mind as they have to spend a lot on transportation and accommodation.

They are both proposing shows, with Universal's "Cinematic Spectacular: 100 Years of Movies Memories", where clips of Universal's movies of the last 100 years will be on screen, couples with pyrotechnics and fountain shows (Universal Orlando, 2018), and Disney's "Fantasmic" boat parade with pyrotechnics, fireworks and waterworks (Disney World, 2018).

In 2013, the company decided to create a new system called "MagicBands", and it began for those who bought it, to be the double of their park ticket, their room key, their Fastpass ticket, and credit card. They are only available in Walt Disney World and make feel the customers that they have no limits (Harvey, 2017). The system allows Disney to collect more data about the guests visits, purchases and customer satisfaction, and it also will improve the customer's experience (Davis, 2016).

Universal has also a similar device which is "TapuTapu" for the Volcano Bay water park, to open customers' rental locker, to make them able to use their credit cards (Universal Orlando, 2018). Disney and Universal are doing similar things in a different way.

4 SOLUTIONS

Disney's Parks are a huge deal in the entertainment industry but is facing some tough competition, specially against Universal's. To understand how they can do better and sustain their leadership, two surveys have been made. One is about the competition in Europe and the other one in the United States of America. Questions have been asked to people from all ages, concerning their preferences and motivations to go to one park or another, whether it was Disney or not.

The issues in both continents are not the same: while Disney is the biggest and only Disney's park in Europe, only Europapark in Germany, Port Aventura World in Spain and Astérix in France are quite big enough to compete against Disney. However in America, there are a lot of huge parks, including Orlando, the theme park capital of the world, welcoming more than 60 million tourists and theme park enthusiasts per year (Sareen, 2017).

Indeed, Comcast has agreed to acquire DreamWorks Animation (Shrek, Kung Fu Panda, Madagascar) in 2016 (Ad Brands, 2018), and took part of "the Universal Filmed Entertainment Group, which includes Universal Pictures, Fandango and NBCUniversal Brand Development" (Stelter, 2016). The CEO said it would helped grow the theme parks in the years to come, so the competition between the parks is still going on, that is why Disney is not willing to stop and have a lots of movies coming.

4.1 Surveys

The surveys have been doon regarding the quantitative method because it was emphasizing the objective measurements and the statistical analysis of data (USC Libraries, 2018), to explain the competition that are facing the Disney's parks. At first, I thought about sending the surveys on Disney's forums and Universal's forums but the answers would have been all the same because of people's obvious preferences for their parks. So the best way to have proper answers was to sent them on Facebook, where mostly students answered, because there were the most likely to be superheroes fans, along with some parents. The first one was made for Europe, as the most of my connections are from this continent. But I have realized the competition was not hard enough for Disney like in America and I could not be satisfied of the answers provided

because Universal does not exist in Europe. I had to do another survey for the Americans, who were most likely to prefer going to another park than Disney's. This survey has been shared on Facebook as well, and the Americans I am friend with shared it on their Facebook also to get more answers. Most of them were from California, but some of them went to Florida as well to visit the parks. Of course, there are some limitations, as parents do not think the same as others because going to Disney for them is always a pleasure to see their children be happy, but the surveys have to be focused on the 18-25 years old because of their love for the thrilling rides. Disney did change to attract them because Universal is very good when it is about amazing rides for adults. When the children come to the age of 14, the parents do want to take them to other parks where the attractions are more epic. Some questions were open to know exactly what were their wants and needs concerning parks and what was bad for them. Then, an analysis has been made of all these answers.

4.2 Competition in Europe

140 answers have been gathered for this survey, where most of them came from France, and where 80% were female and 20% were male. 85% were between 18 and 25 years old, 7.5% between 26 and 35 years old, and 7.5% again were people between 36 and 55 years old. About half of the participants were going rarely to Disneyland Paris and about 30% were going quite often. 70% prefer the Disneyland Park rather than the Walt Disney Studios Park.

A question has been asked to understand why they were answering this way. The ones who chose the Disney Park explained it was because they did not know the Studios one, and that there were more rides at the Disney Park. It is indeed bigger and people love the atmosphere and the magic present there, representing and reminding the origins and values of the animated cartoons, mostly for the people over 25 years old. They also love the fact their children can meet the characters they are watching on television. The people under the age of 25 enjoy the Studios better because there are more thrilling rides such as the *Rock'n'Roller Coaster Starring Aerosmith* and *The Tower of Terror*. Moreover, they answered they enjoyed going better with their friends, while the people over 25 years old are going with their family.

Another question has been asked to know if they were given the possibility to go to a park, which one would it be (Disney's or another). The result was about 50/50. As it was an

open question and the people answering could answer whatever they wanted, they have been able to explain that they love Disney, but think it is too expensive and the rides not thrilling enough, like the ones at Europapark in Germany or Astérix in France. They also think it is too commercial and there is too much people, with long waiting lines. They want to try something new. The threat of a substitute is really present here and it is important that Disney renews itself.

72% of the participants are seeking for thrilling rides in an attraction park, 61% want to spend a good quality-time with their family and 60% are looking for the possibility to dream.

80% love the Disney's sets, 72% enjoy the atmosphere, 55% like the rides, 43% love the presence of the characters inside the park, and 33% like the shows they're offering.

Then comes the question of what people do not like in Disney. They answered, as it was an open question: the waiting lines and the price. They considered it too expensive and said there are not enough cheap restaurants, because the students are not looking for fancy meals, and some of them even said the park needed to renew itself because its image was too childish. The parents think differently, but as other parks may have more thrilling rides, the people who do not have a child already might go there and not at a Disney's park. The solution for the queue would be to do of course like the parks in America where the waiting lines are part of the ride with great animations and amazing sets.

Concerning the latest purchases of the company, known as Lucasfilm, Marvel Entertainment and 21st Century Fox, most of the survey's participants did not know anything about it, while others were considering this as being too different from the origins of Disney and did not want everything to be the company's propriety. The rest of the people are happy because it means different things are going to happen in the parks.

Of course, Disneyland Paris, as being the only Disney's Park in Europe and having not a lot of competition like in Orlando, Florida, the survey couldn't be only about Europe but had to know people's preferences in America, where the competitors are bigger and tougher. That is why a survey for American people had to be made.

4.3 Competition in America

80 answers have been gathered for this survey, where 67.5% were female and 32.5% were male. 82.5% were between 18 and 25 years old, 5% between 26 and 35 years old and 7.5% were people between 36 and 55 years old. About half of the participants were going rarely to Disneyland Paris and about 30% were going quite often. Same as the previous survey, about half people are going rarely to the Disney's parks while 25% are going pretty often.

Concerning their preferences regarding the Disney's parks, 47.5% prefer Disney California (as a lot of them were from this state, it was pretty easy to visit it by car), but then the majority goes along with Disney's Magic Kingdom, which is the more common and representative one of the company, and they love to go with their family to spend a good time. Only 6% of them are going with their friends while the others like to go with their family.

Again, the question of which park would they go to if they were given the possibility to go anywhere was asked (Disney's or another). 60% answered they would go to one of the Disney's parks thanks to the magical atmosphere and the feeling of being a kid again. Indeed, Disney is playing a lot on this as their animated cartoons became so classical and the parents who watched them as they were kids are remembering those times again. However, the others want to see something new and not just a childish environment because they do not have kids that they can see happy, and that is why some would better go to the Universal Studios, Islands of Adventure or Knott's Berry Farm, saying they are more thrilling.

When they are going to an amusement park, 62% of the participants are looking to spend a great time with their family and 52.5% are seeking for the thrills. 67.5% are attracted by the Disney's rides while 45% go there for the atmosphere. 25% love the sets and 22.5% want to meet the characters for their children.

Like the survey for Europe, the Americans also do not like how expensive that is, the number of people there and the number of rides dedicated for kids, judged as not being thrilled enough. Unlike the Europeans though, they know about the latest purchases of the company and they are quite looking forward to see what is going to change, but some still think that it does not look like a Disney universe and are quite afraid it is going to lose its charm. Disney is loved for who it was back in the days when it first released its

cartoons that became so classical, and now that the company is buying other companies to make new rides; people would love the atmosphere remains the same.

The surveys make understand people love Disney in general, it has always been part of our lives and it is a pleasure to bring the kids and the family there to spend a great time. Though, it is quite expensive and there are always a lot of people, making the waiting lines very long to do the rides, which are not thrilling enough compared to other parks such as Universal, Disney's biggest competitor. Some want to see some changes concerning the rides and other are afraid Disney will lose its charm with its animated cartoons, by buying other companies and changing the magical atmosphere of the parks. Disney is unbeatable when it is about families with children, but when the children grow up, they want to try something new and feel older, and that is why Disney had to renew its parks.

4.4 Disney's ambitions

Disney has understood it couldn't compete anymore with princesses, pirates and characters when it is about the people aged from 18 to 25, who are more likely going to go to its competitors, and that is why it recently bought big Marvel Entertainment, Lucasfilm and the 21st Century Fox, making them the possibility to reach a bigger audience with the Marvel's superheroes, the Star Wars fans and all the movies of the 21st Century Fox, in order to please every one. For the release of the movie Avengers: Infinity War, they even changed most of the rides to do the "Summer of the Avengers", which will surely bring all the fans of Iron Man, Spider-Man, Captain America, and of the Guardians of the Galaxy to their parks.

Also, the survey made for Europe has shown the waiting lines should be different and more take-care of, even though it has been recent that there is a new possibility to cut the lines by going it as a "single rider". Disneyland Paris could do the same as the American Disney's, but it is true they have not really a tough competition there, unlike in America.

Let's not forget Universal is one of the most foremost movie and entertainment businesses, and had a successful year in 2015 with "Jurassic World" and "Furious 7", "Minions", "Pitch Perfect 2" and "50 Shades of Grey", but Disney remained the best movie box office in 2017 (Ad Brands, 2018). So even though Universal latest movies are big

ones like "Pacific Rim: Uprising", "Fast & Furious 8", "The Mummy" or "Jurassic World", Disney's remakes are well appreciated and take people to a nostalgic and magical moment. Moreover, thanks to their purchases, they have around 3 Marvel's releases per year, one Star Wars every other year and the numerous movies of the 20th Century Fox such as "The Greatest Showman", "Planet of the Apes", "X-Men", "Alien: Covenant" and "Deadpool".

The Walt Disney Company have to keep crossing 3D and reality coasters in the attractions like the one of *Pirates and the Caribbean: Battle for the Sunken Treasure* in Shanghai Disneyland which is really outstanding and immersive as possible. There are the animatronics of Jack Sparrow and Davy Jones. There is also the latest and only one ride of Walt Disney Studios in Paris which is like that: *Ratatouille: L'Aventure Totale de Rémy*. There are usually more than two hours wait, and it will be soon in Epcot at Walt Disney World, Orlando, in 2021 (The Daily Meal, 2018). They should be careful though not to lose their magical atmosphere because it is the heart of Disney that people fell for. Even though they had pretty much no other choice but to buy Marvel, Lucasfilm and the 21st Century Fox to remain in the competition against Universal, it has to stay true to itself.

As the surveys showed, young people get more and more attracted by thrilling rides and they want to try new parks. The Walt Disney Company made the great decision to make the Studios bigger, wanting to show Disney's engagement to be the Europe's showcase, and to make some changes at the Disney's Park for its 25th anniversary. Concerning America, the movies they will produce will reflect on the parks and will keep compete against their competitors. Disney also revealed creating new lands in both California and Orlando based on Star Wars, along with building a new resort on the same theme (Disney Parks, 2017).

5 CONCLUSION

Doing this thesis has really been interesting and educational. Even though I knew a lot about Disney, Universal and the movie industry, I have learnt a lot.

This thesis showed that what really matters for people when going to an attraction park is the experience, the moment they can enjoy with their families and friends, how the rides are thrilling and the atmosphere of it.

People can feel the magic in Disney's, unlike any other parks, but they still need a renewal because competitors are also attracting them, especially Universal because of its crazy combination between 3D and reality, in a really immersive way.

The Walt Disney Company has parks in America, Asia, and Europe. France has been really lucky to be the one chosen out of all the countries, given the fact Disneyland Paris is the only Disney's park in Europe and it represents 6.2% of France's tourism income.

As we have seen, the creation of a park is very complex and every detail matters. The parks have similarities but also some differences depending on the country's environments and its people.

Disney has for plans to release 20 movies in the 5 years to come, based on its animated cartoons, along with a Star Wars movie every other year. Comcast, the owner of Universal, has recently bought DreamWorks though, so we can understand that the competition is far from being over. After all, Disney is the "most magical place on Earth".

However, the competition is very tough with the companies like Six Flags Entertainment who has the licenses with the DC Comics and Warner Bros, and companies like Cedar Fair, but those two are more focused on providing regional theme parks, making them close to families.

Disney's main competitor remains Universal, with its Studios and Islands of Adventure in Orlando, located just a few miles from Walt Disney World.

Disney is seen more as a theme park while Universal more as a production company, so the movie lovers will be more likely to go there to see what happens behind the scenes of their favorite shows.

Universal is indeed owning a lot of big movies such as Harry Potter, Jaws, Jurassic Park and King Kong. Those ones have allowed the parks to get bigger throughout the years and to attract more people from all around the world.

Unlike Disney, Universal isn't present in Europe but used to own a park in Spain, which is now known as PortAventura World, which made Disney free of huge competitors like Universal.

Universal really raised the level when it constructed "The World of Harry Potter", linking Universal Studios Florida to Universal's Islands of Adventure with the Hogwarts Express, the train of Harry Potter. People can really find themselves in the movies they liked and every details are there, from the restaurants and shops to the magic people can do at some places with their magic wand, which made the competition tougher and the attendance way up than the previous years.

Their waiting lines are also part of the attractions as every room has its charm. They want their parks to be as entertaining as possible, by for example having the world's largest 3D projection installation ever produced for *King Kong 360 3D* in Universal Studios Hollywood, and immersive attractions like the one of *The Walking Dead*, with replications of the show's scenes .

To compete against them, Disney had no other choice but to buy Marvel Entertainment, LucasFilm and the 20th Century Fox, which have for now allowed them to open new rides like *Pandora: The World of Avatar*, to change the *Twilight Zone Tower of Terror* into *The Guardians of the Galaxy: Mission Breakout* (mouseinfo.com, 2017), and to give the *Rock'n Roller Coaster Starring Aerosmith* the "Marvel Transformation" for the summer 2018, giving the spot to Iron Man and the other Avengers.

Of course, Disneyland Paris is following this transformation and went even further by having the project to create three zones for its Walt Disney Studios, which will be based on Marvel, Star Wars and Frozen for the years to come.

While in Orlando, Universal got its Studios, Islands of Adventure and a water park, Disney is way more diversified with two water parks, Animal Kingdom; its largest park with areas representing several different countries with their respective culture and environments, Epcot, where people can do a little world tour with the 11 represented countries and native people representing them, and like Universal, got its Studios and its main park: Magic Kingdom.

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