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2008

Bachelor of Commerce Best Business Research Papers

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Original Citation:

Louie, A. (2008). Disneyland Paris: Europeanizing a resort an international expansion experience. *Bachelor of Commerce Best Business Research Papers, 1*, 22–30. <https://business.journals.uvic.ca/index.php/bcomrp/article/view/91>

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Disneyland Paris: Europeanizing a Resort An International Expansion Experience

Amanda Louie

Abstract

This paper explores the cultural challenges faced by The Disney Company during their international expansion into the European market. With wildly successful park launches in America and Japan, Disney was hungry for further growth and global reach. However, the subsequent launch of the Euro Disney Park near Paris in 1992 did not attract the guest numbers expected and instead was met with some resentment and hostility due to anti-American sentiment. This paper discusses the cultural blunders made by Disney that lead to the disappointing launch. It will focus on the operation and marketing strategies of the company with comparisons drawn between American and French culture to highlight the different perceptions of the park. The paper will also discuss the actions taken by Disney to “Europeanize” the park to appeal to their new marketplace. The report aims to enlighten readers that even the most successfully laid plans must be thoroughly re-examined with a cultural lens during international expansions.

Introduction

International expansion is a growing trend amongst small and large enterprises alike, as organizations begin to recognize the potential of the global market place. For decades companies have explored these opportunities in hopes of expanding their market size and generating new revenues. With these opportunities, however, comes a myriad of threats that stem from operating in unfamiliar territory. Amongst the risks included in foreign investment are the inability to recognize or adapt to local preferences, languages, customs, and business practices.

This report will examine the challenges associated with international expansion through the Walt Disney Company's experience in France. The Disneyland Resort in California has dominated the theme park industry for years with successful marketing and operations strategies geared towards their American consumers. With two subsequent launches of successful resorts in Orlando and Tokyo in 1971 and 1983 respectively, The Walt Disney Company decided to enter the European market in 1992. This report will address the challenges faced by the Disney Company

during their expansion into Europe with a focus on errors in the operation and marketing strategies. It will also address how Disney responded to these errors and what adjustments were made in order to make this park successful in the European market. The aim of this report is to understand the complexities of expanding into international markets, in particular Europe, for small or large corporations alike. Although this report could not possibly encompass the enormity of the Disney marketing and operations strategies, it will aim to highlight those factors that have been impacted by cultural differences.

Park History

The first plans for a Disney park in Europe originated back in 1984 when the feasibility of the project was considered and potential sites for the park development was investigated (Grant & Neupert, 2003: 263). In 1987, the French government announced that the Euro Disney Resort was to be opened in the eastern outskirts of Paris. This location was chosen due to its proximity to Paris as well as its central location to neighbouring countries, which would put “the park within 4-hours drive for around 68 million people, and 2 hours flight for a further 300 million,” (Solarius, 2006). In addition to this, the French government offered special concessions in order to attract the theme park, including cutting the taxes on entrance tickets in half and extending the public metro and high-speed train systems to the park (Lewis, 1987). The government also “provided a twenty-year loan of \$960 million...and arranged other loans with syndicates and the state bank,” in addition to selling the land at a discounted rate of \$5000 per acre (McGuigan, 2004: 70). In return, the French economy would benefit by the numerous jobs that the park would stimulate, as well as the continual revenues generated by visitors to the park.

During the creation of the park, it was made well aware to the park engineers, known as *imagineers*, that the French treasured their

culture and that this should be reflected in the park. There are three notable examples of how the imagineers tried to incorporate French and European culture into the park. First of all, many of the attractions would be renamed to reflect European literature and films; for example, Space Mountain was named “De la Terre à la Lune” in homage to the French author, Jules Verne (Solarius, 2006). Secondly, the cuisine served in the park was tailored towards European tastes, including an entirely French restaurant on Main Street. These trends continue today with crêpes and espressos being served at food stands in place of the churro and ice cream stands typical of the American parks. Finally, the appearance of the park itself was modified:

For example we created the gardens in front of the hotel because we felt we have to give people something before they give back to us..... In California, where everybody is used to paying and getting in line, it is just a row of ticket booths and fences - no one expects anything more. It is not like going to Versailles or the Tuileries or any public space in France where there is a presentation and the staging of the arrival sequence is important. (Baxter, 1995 Interview)

The park also modified its architecture and included more interconnected and covered areas than any other theme park (Grant & Neupert, 2003: 264-5). This was modified in order to make the park less weather dependent in anticipation of the typical gray winters in Northern France.

Park Opening

Euro Disney Resort opened on April 12, 1992. The optimistic executives who had gone to great lengths into planning and executing this project had predicted that 11 million guests would visit the park each year, with half of those being of French origin (Introducing Walt D'isigny, 1992). Despite the careful preparations and the \$4.4 billion invested into the park, opening day was wrought with troubles. A mix of rioters and protesters, which included intellectuals,

farmers, and labour unionists, protested at the gates, while a strike on the train line that connects Paris to Marne-la-Vallee cut access to the park for thousands of individuals. In addition to this, attempts to cut the park's power were made as two bombs damaged nearby electricity pylons (Riding, 1992).

Attendance rates on opening day fell below expected figures. This seemed to be a repeating pattern over the next 24 months. Guest figures fell short of predictions with only an estimated three in ten guests being of French origin (Solarius, 2006). The park reported a \$900 million dollar loss in the first year (Murphy, 2004: 173). The financial crisis and flop of Euro Disney became a favourite topic of discussion amongst Europeans, which many believe exacerbated attendance rates:

Comments included claims that many French were too individualistic and private to appreciate the standardized and crowded Disney theme park experience. Others felt that the French tended to enjoy entertainment which was more intellectual in nature than Euro Disney. (Peck, 1999: 369)

Panicked executives and investors began to re-evaluate this business prospect, as it became clear that some adjustments were necessary in order to change perceptions and earn a profit.

Causes for Initial Failures

Marketing Errors

The park's initial failures can be linked to a number of causes, including those that stem from a lack of cultural understanding. From the start of this project, the Disney imagineers underestimated the cultural gap between America and Europe. Although efforts were made to adapt to French culture, the changes were subtle and were widely criticized in the media:

Euro Disney is not a French adaptation of the company's parks in California and Florida...Euro Disney is the familiar all-

American park somehow landed on 5,000 acres of wheat fields and beet fields in Marne-la-Vallee. (Corliss, 1992)

The park, complete with American flags waving along Main Street U.S.A., was perceived as an unwelcome cultural invasion.

This perception was embellished by the aggressive marketing approach. Prior to the park opening, "the company inundated the European press and airwaves with an advertising and marketing blitz said to cost \$220 million, including a \$10 million gala televised across the continent" (Riding, 1992). Although this aggressive approach is common in America, Cédric Manara, Professor at ED-HEC Business School, explained that aggressive marketing is highly frowned upon in French culture.¹⁷ Advertisements that appealed more to the emotional experience of the park would have been much better received by the French population than the "bigger is better" American style. Overconfident executives worsened the situation when they were quoted saying things like "We're building something immortal, like the pharaohs built the Sphinx" (Eisner with Swartz, 1998: 221). The media used these quotes to portray Disney executives as arrogant imperialists, which stimulated more negativity towards the coming theme park.

The media contributed to the perception of Americanization by referring to the park as 'a terrifying giant step toward world homogenization', 'a cultural Chernobyl', and a 'conservatory of nothingness' (Kuisel, 1993, 228). Other reporters, however, argued that the unashamed all-American style of the park was the main attraction:

Despite what French intellectuals like Jack Lang say, the ordinary Frenchman likes American mass culture. American films now account for 60% of ticket sales in French cinemas--twice the proportion a decade ago.

¹⁷ Cédric Manara, European Law Professor, ED-HEC Business School, Interviewed by the author with permission, November 6, 2007

American pop music dominates French record sales. French television would likewise be swamped with American productions if the government had not imposed quotas requiring at least 60% of television films to be of European origin. (Introducing Walt D'isigny, 1992)

The opposing viewpoint served only to confirm amongst French intelligensia that their culture was being threatened. Disneyland became a symbol of both Americanization and of America itself as protestors with different causes used the park to demonstrate their dissatisfaction with the US. Amongst the mix of opening-day protestors were farmers who were protesting US farm policies and who tried to enforce a blockade of the park (Grant & Neupert, 2003: 269). Many media sources warned visitors to stay away due to large crowds and conflict with protestors. This media disaster contributed to low park attendance, and immediately gave a poor reputation to the Euro Disney name.

Operational Errors and Misjudgments

Disney has always been a family-oriented themed park, and has thus taken a stance to serve no alcohol and have designated smoke areas away from large public spaces. This stance was extended to the Euro Disneyland Resort who only offered "mocktails" in place of alcoholic beverages (Corliss, 1992). These restrictions were met with strong resistance from many Europeans, namely the French, who incorporate both as an important part of their culture and identity. It outraged a large number of individuals, who were accustomed to having a glass of wine with each meal, which generated more negative media attention.

Another misjudgment was not allowing guests to carry in their prepared lunches. Many people were trying to save money and time by bringing meals to the park, whilst the Disney Company anticipated the French purchasing lunch in their restaurants and stands. Cédric Manara remembers how

many people were angered by the bag checks which initially prevented outside food from being brought into the park.¹⁸

This problem was compounded because Disney did not anticipate the eating patterns of Europeans. In America, the lunch break is typically spread over a three-hour peak period; whereas in Europe, it is usually compacted into one hour and a half between 12:00 and 1:30, in which everyone is expecting to eat. This made for difficult staffing for that short peak period when the majority of the guests converged upon the restaurants. Furthermore, park imagineers actually scrapped much of the seating that was originally conceived since they believed that many visitors would eat their meals as they strolled in the park. This was a big misconception, as many Europeans preferred a leisurely sit down lunch rather than the fast food pace typical in American culture (Grant & Neupert, 2003: 269). The long lines and lack of seating coupled with the lack of alcohol, created a poor Disney experience for many park goers.

The executives also miscalculated the time and money that park-goers would spend in Disneyland. Overdevelopment and overstaffing of the nearby hotel industries created huge financial difficulties for the park when it was discovered that the average European family spent only two days at the Euro Disney Park, as opposed to the four day averages in the American parks (Keegan, 172). In addition to this, the less materialistic nature of the Europeans meant that much less was being spent on souvenirs than anticipated. The slight recession in Europe further distorted the executives' optimistic estimates.

A final critical operational error was Disney's human resource management. Disney has always had very strict codes of conduct and appearance in order to ensure the best

¹⁸ Cédric Manara, European Law Professor, ED-HEC Business School, Interviewed by the author with permission, November 6, 2007

customer service is provided to its guests. In September of 1991, Disney began to hire and recruit the 10,000 needed employees that would help operate the park. During the application process, a video as well as an employee handbook was given to the applicants specifically describing "The Euro Disney Look" which included regulations on hair color and length, mustaches and beards, tattoos, jewelry, make-up, as well as the colour of undergarments, which could only be of neutral colour (Grant & Neupert, 2004: 269-70). This immediately generated protests from local labour unions, such as the General Confederation of Labour who claimed that these practices were "an attack on individual freedom" (Grant & Neupert, 2003: 270). In addition to these criticisms, many employees were unhappy with the longer workdays and shorter breaks. As a result, in the first year of operations, 34% of the staff chose to leave or were dismissed (James, 1993). These created costly turnovers, and generated more criticisms from labour unions.

Making Adjustments

Marketing Changes

Disney has made a number of changes to help "Europeanize" the Euro Disney Park. One of the first most notable changes was changing the name from Euro Disney to Paris Disneyland in 1993. This served two main purposes. First of all it allowed the park to be associated one of the most romantic cities in the world, rather than the term "Euro" which the Europeans associated with currency and bureaucracy (Murphy, 2004: 174). Secondly, the renaming of the park allowed for the negative connotations associated with the Euro Disney name to fade, and allowed a fresh start for Paris Disneyland.

Disney also had to make huge efforts to restructure their marketing campaign to reflect and reinforce the values of the European market, such as family bonding. They have also moderated their marketing approach to be less aggressive. Disney has

achieved this by expanding its distribution system to be more subtle than their direct television ad bombardment. Although they continue to use television advertisement, they now use several more mediums to reach their target markets. For example, Disney has now incorporated the use of billboards, metro station advertising space (on walls and on exiting doors), grocery stores, and internet advertising on server sites such as Orange, a popular European search engine available in many languages.

Another important change for the company was expanding their marketing efforts to neighbouring countries. This has included efforts in Africa and Israel (Burgoyne, 1995). Much of this effort has come after the 1994 stock restructuring in which Saudi Prince Al-Walid bin Talal bought \$55 million in stocks to help bail Euro-Disney out of financial bankruptcy. This partnership continues to be advantageous to Disney as in 2006 the Prince made an agreement to help distribute Disney merchandise across the Middle East and Africa (*Saudi Prince Wants Disney Park*, 2007).

Disney has also made some smart partnerships with travel agencies and tour groups, such as Britain's largest tour operator Airtours, as they have discovered that Europeans are more reliant than Americans on such intermediaries while they plan their vacations (Chu, 2002). Disney also began to understand the traveling patterns of their European consumers. They have learned that rather than the week long vacations that are typical in the American theme parks, that the average six weeks of vacation time accrued by Europeans meant that Disneyland was just one of many traveling stops on a lengthier vacation. Disney used this knowledge to incorporate itself as one of many destinations on several travel itineraries.

A final marketing strategy implemented by Disney was their efforts to enhance their own reputation by improving their media relations and their public image. This has been

achieved partially by losing the arrogant attitude associated with the park opening in 1992. For example, a decade after the initial park opening, Disney introduced a second theme park to the Disneyland Paris Resort with the opening of Walt Disney Studios in 2002. High cautions were made to ensure that the disaster of the first park opening would not be repeated:

The obvious goal of that three-day media extravaganza was to make sure that the press not only saw the new park, but encouraged its readers to visit as well...Yet the underlying theme of the event was almost a plea to the media to please, please be kind. It seemed as if everyone in the resort—from the overly friendly media hosts who couldn't find a bad word to say about anything, to the anxious publicists determined to put the right spin on everything—were holding their collective breaths, waiting for the reviews to come in. (Vincent-Phoenix, Disneyland Paris: Re-branding a Resort)

In addition to the change of name from Euro Disney to Disneyland Paris, the company was able to improve their public image by downplaying their financial situations and instead concentrating their efforts on their growth, their cultural improvements, and their milestone events. They have also been active within the community, sponsoring many events and donating to charities.

Operational Changes

Disney has long since admitted that it was unprepared to tackle such an international business venture:

"We had not yet had an on-the-ground experience in a multicultural environment," says ceo Jay Rasulo, a Disney veteran who took the helm of Euro Disney in 1998. "It was really the first park that had the majority of its guests coming from very diverse cultural backgrounds." (Chu, 2002)

Some of their first operational changes included transforming the American Park in France into a multicultural park of Europe. Park maps, signs, and even attractions

became multi-lingual, offering services in six different languages: English, French, Dutch, German, Italian and Spanish. For the attractions in particular, becoming multi-lingual took some ingenuity. Shows and attractions that included dialogue included headsets in which languages could be selected, or had several television prompters that had sub-titles in each of the respective languages. The parades are a mixture of French and English songs and dialogues, while the live theater shows are offered in French or in English at different show times. The ideas generated in order to "internationalize" the park were so successful that it inspired the Anaheim Resort to adopt the same bilingualism with their large number of Spanish speaking guests.

Another concession made to "Europeanize" the resort was allowing alcohol to be served in the park. This was an early operational change within the first year as it was a widely criticized by the public and media. Beer and wine were available for the first time in many of the Disney restaurants. Another early change was allowing food to be brought into the park. This served two purposes: first, to appease the critique of the public; and second, to help reduce the long line ups generated by the peak eating hours at the restaurants. To additionally help reduce the long wait times for tables at restaurants, the park reduced the prices at the fast-food restaurants and increased seating capacity (Keegan, 2001: 172).

To address the large number of vacancies and overstaffing, the resort closed down several of the hotels during the off-season to re-evaluate their needs. Reduction in hotel prices and new packages were introduced in order to help stimulate attendance. To deal with the extreme seasonality and patterns of European holidays, Disney introduced new weekend packages and introduced new seasonal entertainment specials such as Halloween and Guy Fawkes Day. This helped increase hotel capacity in addition to dispersing attendance more throughout the year. Additionally, the opening of a second

park, the Walt Disney Studios, had the specific objective of increasing the average length of stay of guests:

An expected two-park total of about 17 million in the Studios' first full year — will stay an extra day and night. More time on-site means more time to spend on meals, rooms and Mickey Mouse ears. "The profit doesn't come from the theme parks," says Mark Abramson, an analyst with Bear, Stearns in London. "The profit comes from the hotels, restaurants and shops, all high-margin businesses."

The opening of the second park led to a record attendance year of 13.1 million guests which has just recently been surpassed by the current 2007 year which celebrates the Resort's 15th Anniversary with 14.5 million guests (DLRP Today, November 8, 2007).

Disney has also made efforts to improve their employee relations. They have restructured their dress and behavioral codes to reflect European standards and traditions, while introducing maximum work week hours for employees. They have also reclassified their job positions using the French classification system, which better allowed French citizens to recognize and understand the positions (Burgoyne, 1995). In addition to this, Disney has also provided an enormous amount of training to its staff, including free language lessons, French and European cultural lessons, and advancement opportunities. Although they still continue to struggle with unions, only about 10% of the parks 12,000 employees are part of seven various unions, which include the French Christian Workers' Confederation and the Communist General Confederation of Labour (BBC News, Strike at Disneyland Paris, 1999). Besides a strike that lasted 20 days in the summer of 1998, strikes and union disruptions have been relatively minor in recent years.

Disney has tried to maintain their high standards and expectations from their employees; however, the park has become more cordial towards French service standards. Anne Witte (Professor and

Assistant Dean at ED-HEC Business School in France), who has studied anthropology and is a French culture specialist, explains that the French view customer service in a very different way than those in North America. She explains that the French feel that customer service is demeaning and is an undignified act.¹⁹ Thus, even though the "Disney look" and the "Disney smile" are taught to all Disney employees across the world, there is a clear distinction between North American and the French employees' behaviours. Bryan Maroun, who has worked for Disneyland Park in Anaheim, California for three and a half years, recounts his first impression of the Cast Members (employees) on his recent visit to Disneyland Paris:

My impression of the Cast and Standards of Paris were dismal. The standards that I hold my Cast Members to seem to be much higher than what Disneyland Paris' are. For example, my Cast Members are expected and taught from day one [that] if you see trash on the floor, to pick it up. This is from the Executive level to Hourly [employees]. I did not see this at all in Paris. There was trash cans overflowing, trash on the floors, even vomit in the queue of an attraction. I informed the Cast Member at the attraction and she said, "oh yeah, we know" and kept moving. I was shocked. I also noticed that the Cast Members were not as friendly. I can't remember any "out of this world" interaction with a Cast Member where I felt they went above and beyond for me or made an impact on my experience, which is sad because Cast Members should be striving for that.²⁰

The quality of service may still be high for the largely French employee base; however, the obvious differences in standards show the concessions that Disney has had to make in order to operate a theme park in France.

¹⁹ Anne Witte, Professor and Assistant Dean, ED-HEC Business School. Cited with permission to the author, December 12, 2007

²⁰ Bryan Maroun, Manager, Disneyland Park, Anaheim, California. Interviewed by the author with permission, December 11, 2007

Current Perspectives of Paris Disneyland

Many business analysts are still trying to assess whether or not Disneyland Paris can be considered a success. Following the changes made to make the park more culturally sensitive, Paris Disneyland experienced several years of profit; however, in recent years it has been operating at a loss, partially due to economic downturns, and other macroeconomic factors. Despite this, Disneyland is the most popular destination in Europe, surpassing iconic monuments and museums such as the Colosseum, the Louvre, and the Eiffel Tower. It is also celebrating its' 15th Anniversary, which suggests that the park is establishing its roots in France.

At present, the company continues to be critiqued on their marketing and operational strategies. For example, for the celebration of the Park's 15th Anniversary, the marketing budget was increased 13.3%, from 106.3 million euros to 120.4 million euros (EuroDisney S.C.A, Annual Report 2006). The heavy advertising campaign led a local French newspaper, *Les Echos*, to once again question the parks aggressive marketing tactics (November 27, 2007); however, Disney responded by saying that they wouldn't be Disney if they didn't follow their customary approach to each major anniversary.

Whether or not Disney has truly "Europeanized" is still in question. Upon interviewing several European and North American students, the general consensus felt that the park still had a largely American flavour to it, despite the changes made to appease European cultural norms and preferences. One Canadian park enthusiast, who has visited the California Park and the Paris Park on three and two occasions, respectively, uses the analogy of an American person who has moved to Europe: he eats the European food, he speaks the French language, and he adapts a European

lifestyle; but at heart, he is still an American.²¹ Perhaps the park has become just European enough, albeit with the same American appeal, to allow it to continue to be a popular tourist destination and a thriving success in the coming years.

Conclusion

Disneyland is a prime example of the dangers of misjudging cultural diversity. A key lesson can be derived from the Euro Disney/Disneyland Paris experience: no matter how meticulously executives plan and forecast their operational, marketing, and financial details and budgets, there is high chance of failure if cultural sensitivity and analysis is not thoroughly performed. Even the tried and true Disney formula that had been a success in Tokyo could not overcome the cultural barriers presented in the European market. Disney was fortunate enough to have the opportunity to rectify many of these cultural blunders; however, they would not have been able to remain open had it not been for the generosity of their bankers and investors. The Disneyland Paris Resort was able to revisit and revise their strategies to align them closer to the values and norms of Europe, yet doing so without losing the identity and characteristics that have made it uniquely Disney.

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²¹ Brett Thompson, Disney Park Enthusiast, Interviewed by the author with permission, December 8, 2007.

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