

**PLANNING FOR
WALT DISNEY WORLD**

**A Memorandum Report to
Walt Disney Productions
January 1972**

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In mid-1971 Roy Disney asked us to work with him and the Disney organization to take another look at the long term future of Walt Disney World. As he put it, the time had come to "sit on top of the hill", in order to get a longer, broader view.

It was agreed that the role of HKS should be to help the company resume its long range land planning. Many changes had taken place since 1967, when the company had suspended overall master planning in order to concentrate on the Theme Park and Resorts; our assignment was to review those changes and help set in motion again the master planning process.

Introduction

Accordingly, in December 1971 and January 1972 a series of presentations on this subject were made both in Florida and California. This report assembles and summarizes the content of those presentations.

The first section of the report is, in effect, a "picture" of the Orlando Region at a single point in time; it outlines information that the Company will want to continually up-date. The second section is preliminary analysis of the environment and natural systems; this work provides a foundation both for overall master planning and for the detailed environmental impact studies that will be needed for specific projects. The third section is an analysis of alternative long range development strategies. The fourth is a specific work program for moving ahead now.

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MOVING AHEAD WITH PLANNING

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The 27,400 acres of Walt Disney World are one of the principal assets of the Disney organization and one of the great land assets in the country. The "management" of that asset is a major activity of the company, and as the next management step the company intends to resume its overall master planning activity.

Because Walt Disney World is an unconventional place it needs an unconventional master plan. The starting points for the plan are (1) the vast acreage of the land itself, (2) the rapidly changing regional setting, and (3) most important, Walt Disney's original concept of "a new, different kind of world .. to hold all the ideas and plans we can possibly imagine".

In these circumstances the master plan cannot be, as the Theme Park plan was, for example, a precise plan for specific projects. It should be not so much a blueprint of the future, as a strategy for moving into the future. It should provide a flexible framework for accommodating future changes and the many ideas and plans that will evolve out of the company's imagination. In other words, the master plan should not be a specific program for building up the land in 20 or 25 years, but an on-going planning process for managing the land to achieve the company's objectives year after year.

The content of the Walt Disney World planning work should be shaped by four basic purposes. It should provide a foundation for:

1. Financial planning and overall corporate strategy. In view of the magnitude of this land asset, financial planning and land planning must go hand-in-hand.
2. Working with state and local government agencies on projects of common interest. To maintain accessibility and overall environmental quality the company will be continually working on the interrelationships of Walt Disney World with the region around it.

The Purpose of This Report

3. Informing the public. As a large landowner, the company has a new relationship with both government and the public which will have profound long term significance for the company's future opportunities.
4. Detailed planning and design for construction of specific projects.

This memorandum report takes a first step in those directions. It summarizes material gathered from the many reports, studies and research efforts that have been prepared over the past few years. Its role is to put that material into a form in which it can be used for continuing master planning, providing a structure for the data, and raising the major issues that must be dealt with this year and over the long term future.

The memorandum concludes with a basic work program for future planning. It describes the tasks that can be carried on within the company and identifies a few specific areas where outside assistance may be required.

Further refinements of the program will be required when the planning team is organized and responsibilities assigned. The program outlined here is the beginning.

THE REGION

The first part of our study was an analysis of the regional setting of Walt Disney World.

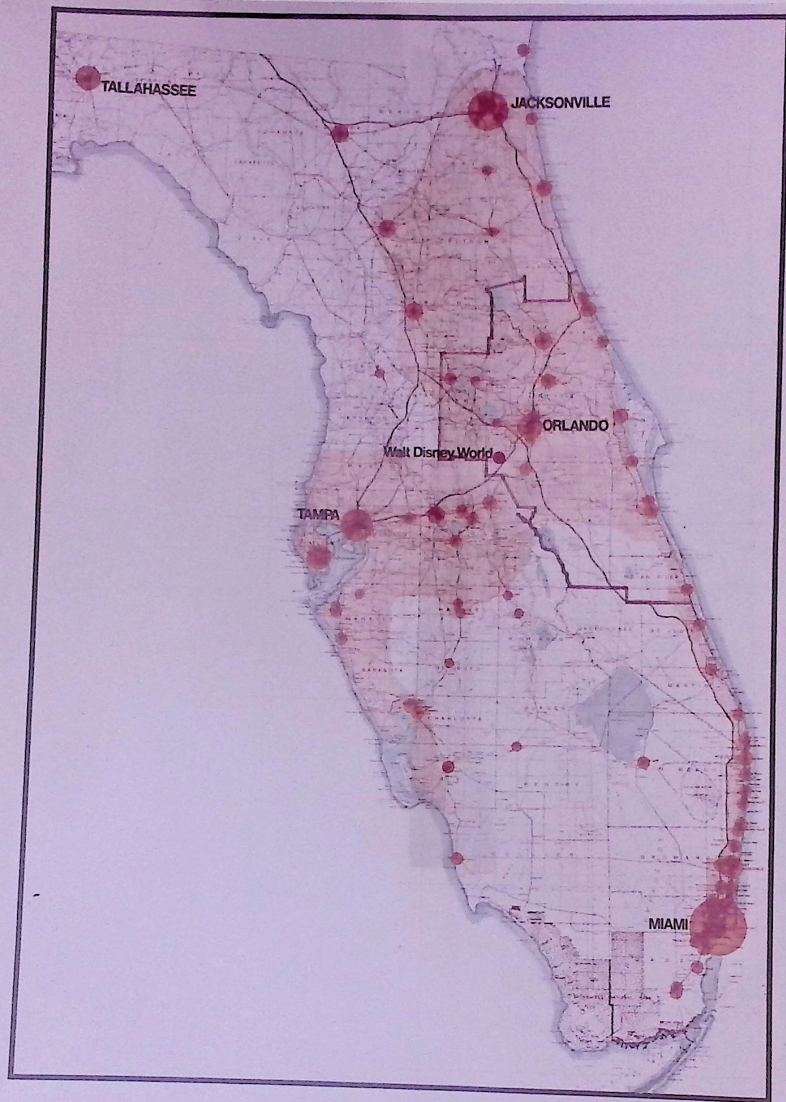
A new kind of vacation region is developing here. Unlike vacation regions of the past it is based not on mountains or seashores or other natural attractions, but on family entertainment. The area was growing before the announcement of Walt Disney World; now it is probably the fastest growing part of the country.

It is a region of virtually unlimited opportunities, and a region facing all of the familiar problems or urbanization in America. Already one can foresee traffic congestion, overloaded public services, increasing taxes, housing shortages, particularly for low and moderate income families, and potential conflicts between economic growth and environmental quality. But the problems have solutions and the opportunities add up to an extraordinary potential if the Company fully understands its region and helps shape its growth.

Florida Urbanization Trends

This map of Florida shows the existing urban areas (red dots) and major highways. It also shows (in the tan color) an Urban Land Institute projection of urban development in the state by the year 2000. This projection, made before the announcement of Walt Disney World, indicates an urbanized corridor extending from Tampa across the state to Orlando, east to the ocean and north to Jacksonville. It also indicates continuing urbanization of the coastline. The density of the urban corridor across the state was projected as equivalent to the Washington - New York - Boston corridor.

The seven county East Central Florida Region, dominated by Orlando, is outlined in gray. However, as a result of the construction of I-4 and continuing urbanization, the economic region of which Orlando is a part, is becoming the entire Jacksonville - Tampa corridor.



WALT DISNEY WORLD
FLORIDA URBANIZATION TRENDS

Walt Disney World: Regional Impact

The solid, steady growth experienced in the East Central Florida Region before the announcement of Walt Disney World is reflected by the brown base line on each of these graphs. The Disney announcement has greatly accelerated this growth. And each successive study of Disney impact has been more bullish than the last. This increasing optimism is justified by the enormous secondary effects already apparent in the region and by other tourist attractions that are being drawn to the area by Walt Disney World, in other words, by the emergence of the new vacation region.

The top line on each graph represents regional impact based on 1971 Theme Park attendance estimates. These figures are derived from Walt Disney World and Economic Research Associates sources. The lower lines represent ERA projections of only two years ago done as part of a very comprehensive study for the East Central Florida Planning Council. In two years ERA revised their figures upward by over 40%.

The latest set of figures indicate that by 1985, there will be 8.3 million new tourists drawn to the region by Walt Disney World. They will spend some 745 million dollars, which will generate 70,000 new jobs and support an increase in population of 190,000 - all over and above the underlying regional growth recorded by the base line. In other words, the attendance at the Theme Park can be translated by mathematical relationships through a series of steps that lead directly to population growth. The message is that the Orlando Metropolitan Area is on the way to becoming a big city - and a major population and business center in the Central Florida Corridor.

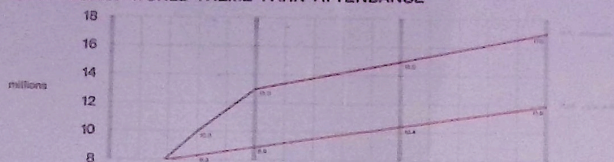
1970

1975

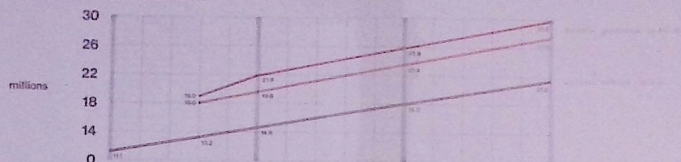
1980

1985

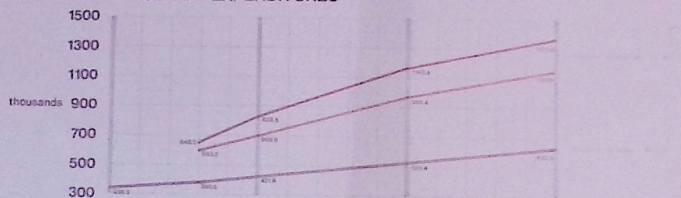
WALT DISNEY WORLD THEME PARK ATTENDANCE



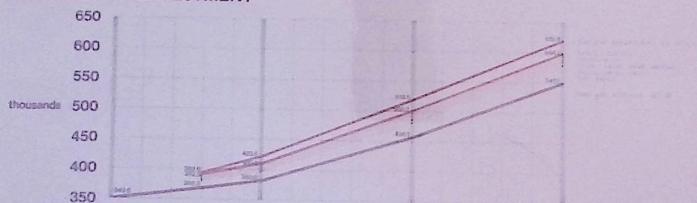
INCREASE IN TOURISTS



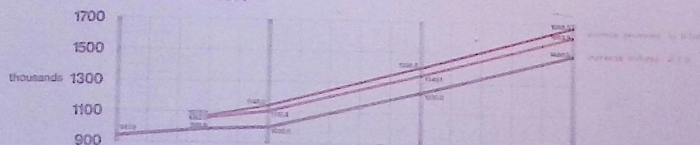
INCREASE IN TOURIST EXPENDITURES



INCREASE IN EMPLOYMENT



INCREASE IN POPULATION

WALT DISNEY WORLD
REGIONAL IMPACT

Southwest Corridor Impact

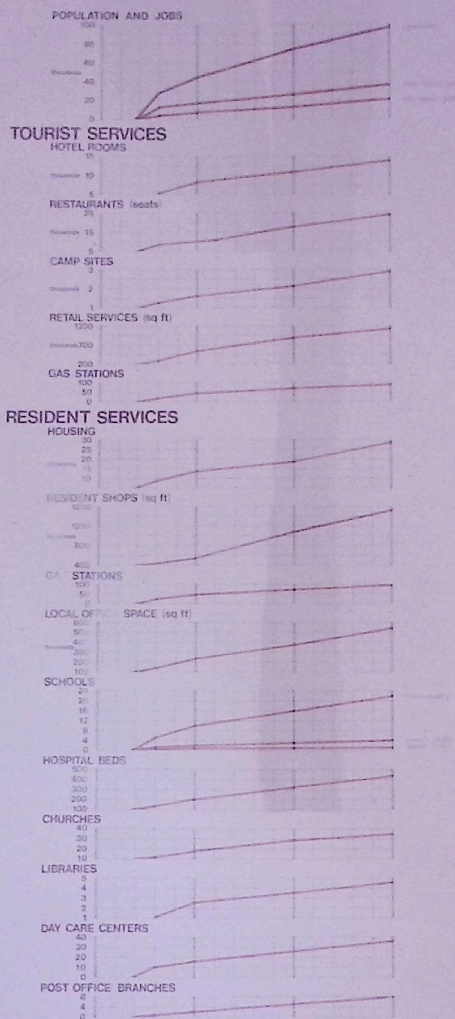
The total impact of Walt Disney World will be spread all over the seven county region and even beyond. In this study the local impact immediately around WDW has been isolated -- that is in the corridor southwest of Orlando along I-4 and Beeline Highway. This can then be compared with the existing development patterns around Orlando.

The number of jobs generated by Walt Disney World in the localized southwest corridor by 1985 will total 36,000. These jobs will support a resident community of 97,000 people -- another city equal to the size of Orlando today. The residents in turn will require many kinds of urban services including those plotted in the graph -- local and regional shopping centers, gas stations, offices, schools, hospitals, libraries, day care centers, post offices, and hundreds of other activities, all in proportion to the size of the population.

Although the presence of these jobs does not mean that all these people will live in the southwest part of Orlando, there will be tremendous pressures for housing in the I-4 corridor; some of these pressures and problems are already apparent. They will rapidly multiply as increases are felt in traffic congestion and as the southwest becomes established as a complete "neighborhood" and a good place to live. Tourists will generate a separate but equally large demand for many of the same services plus some of their own, primarily hotels, restaurants, shops and gas stations.

The general magnitude of all of these requirements are predictable, given up-to-date information on the performance of the Theme Park, characteristics of the tourists and local development activity.

1970 1975 1980 1985

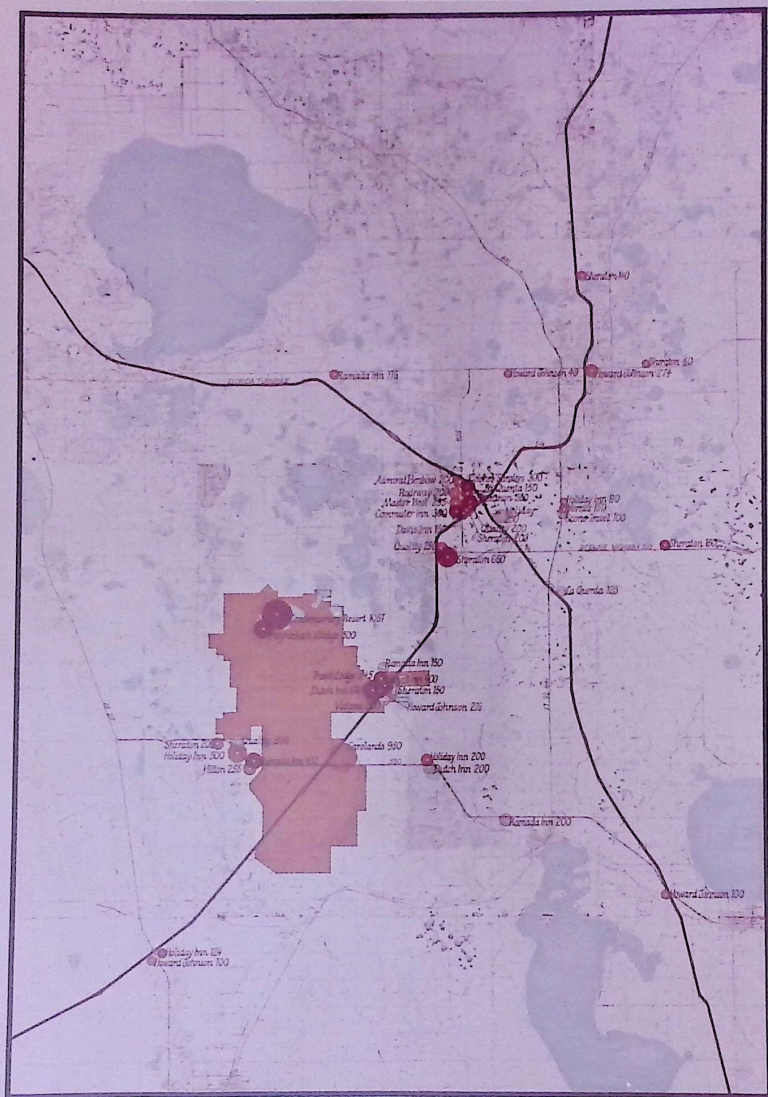


WALT DISNEY WORLD
COMMUNITY BUILDING IMPACT
 Southwest Corridor

WALT DISNEY WORLD, 1970-1985

Hotel Development

This map shows where the new hotels are going as of December 1971. 80% of the 13,000 new rooms shown on the map are in the southwest corridor. 5,700 of the total are already open or under construction; the remaining 7,300 units are almost evenly split between "definitely planned" and "speculative" categories. However, this situation changes almost daily. Other sources claim even higher totals of units in the works. This map illustrates the degree to which people are already taking advantage of the Disney investments. The comparison of this map with Disney experience in Anaheim is interesting.



WALT DISNEY WORLD

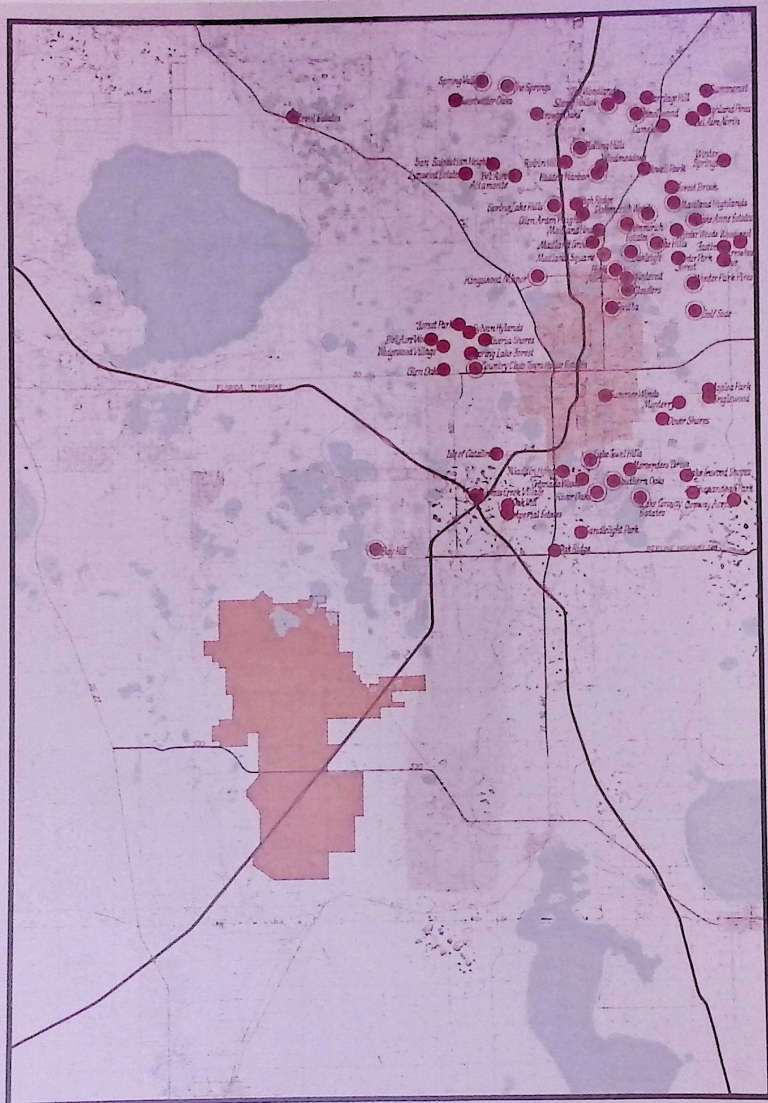
HOTELS Development Trends

- UNDER CONSTRUCTION - RECENTLY COMPLETED
- PLANNED
- SPECULATIVE

Hart - Krivatsky - Stube October 1971

Residential Growth Patterns

Residential developments around Orlando, as shown on this map, are still in 1971 following more traditional patterns of growth -- mostly to the north and northeast, with virtually no activity in the southwest corridor -- but this is bound to change as jobs become more concentrated in the south and southwest sectors. One change in traditional housing patterns has already appeared in Orlando: from 90% single family in the early 1960s to an almost 50-50 split between apartments and single family homes in the past 3 years.



WALT DISNEY WORLD **HOUSING** **Development Trends**

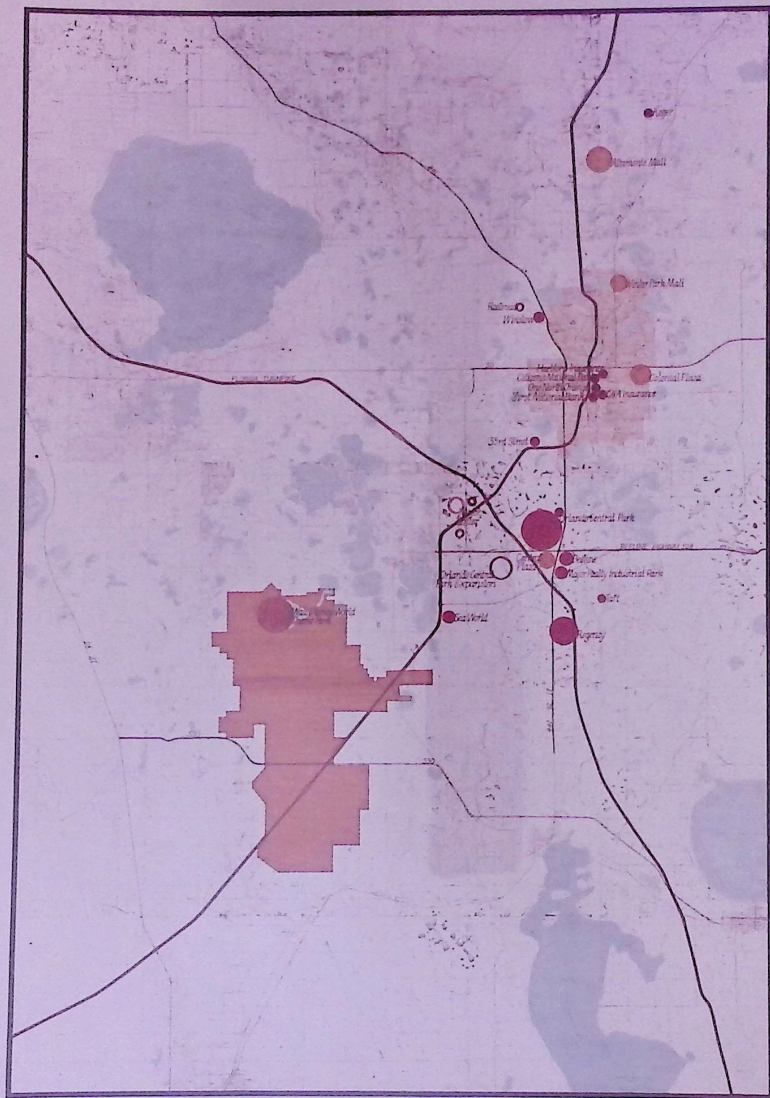
- LUXURY - OVER \$40,000
- CONDOMINIUM UNITS
- SINGLE FAMILY UNITS

Hart - Krivatsy - Stube October 1971

Commercial and Industrial Development

The pattern of existing regional shopping centers, shown as orange dots on this map, follows the pattern of residential growth. However, two new centers (orange rings) are planned for the southwest - one at Major Center and one along the Beeline. Office construction, shown as brown dots, is still concentrated downtown although recently some offices have been built at Orlando Central Park, and Major Center would like to create a regional office center in the future. The more active industrial parks (red dots) are all located in the southwest and will add to the demand for housing and services created by the tourist business.

This pattern is a more stable one than housing or hotels. Commercial and industrial development tend to take place in "centers", requiring longer lead times, larger investments, and extended build-out periods. Major changes are unlikely over the next several years.



WALT DISNEY WORLD **COMMERCIAL AND INDUSTRIAL** **Development Trends**

- REGIONAL SHOPPING CENTERS
- COMMERCIAL RECREATION
- INDUSTRIAL PARKS
- OFFICE BUILDINGS

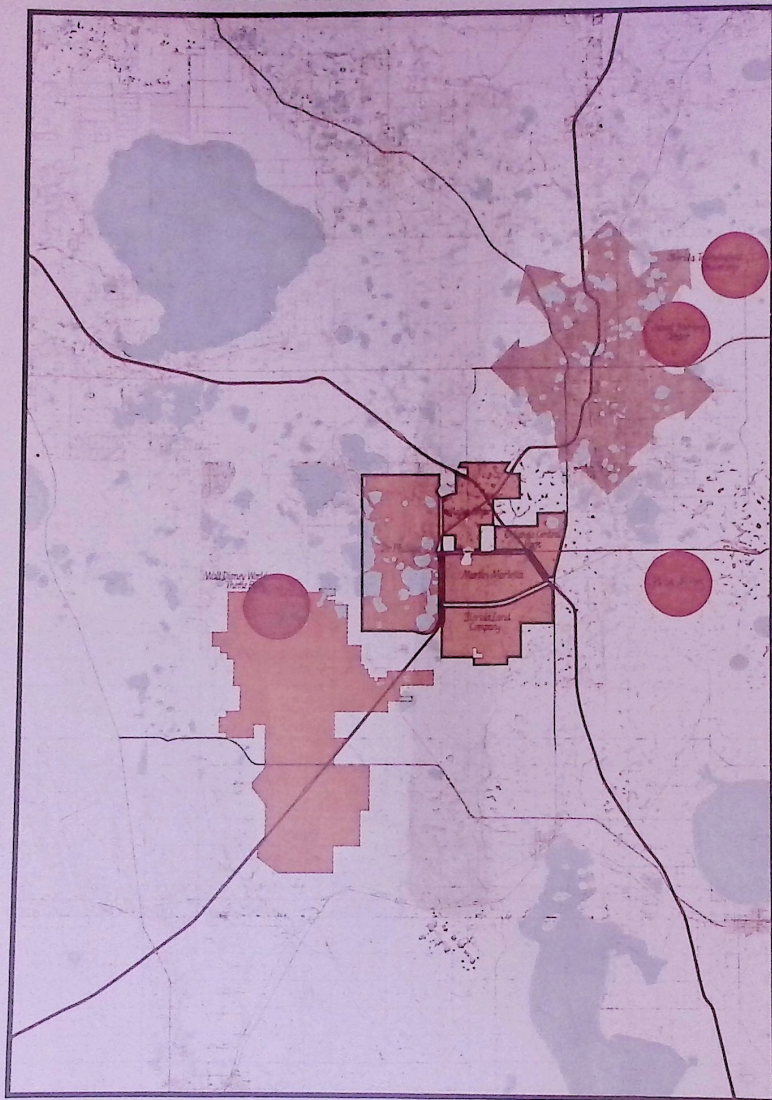
Hart - Krivatsy - Stubee October 1971

Metropolitan Growth Factors

The traditional growth of Orlando has been in concentric rings moving outward from downtown --predominately to the north and northeast but also the west along U.S. 50 and, with more recent industrial growth, to the south. Although the City and Regional Planning Agencies are continuing to project this general pattern of development, we believe that a number of metropolitan growth factors are about to cause radical departures from historical patterns.

This map shows the four most dynamic growth generators in the metropolitan area - Walt Disney World; McCoy Jetport; the new and rapidly growing Naval Training Center; and Florida Tech, a new university expanding toward 25,000 students. All four of these activities are located outside of the traditional growth areas. The region has already seen the impact of Walt Disney World on hotel locations; now Florida Tech and the Naval Training Center are beginning to have similar effects on housing plans.

In the southwest corridor the potential for rapid growth is enhanced by the huge land holdings for Major Center, Florida Gas Martin Marietta, Orlando Central Park, Dr. Phillips and Disney. These are all knowledgeable groups with development intentions.



WALT DISNEY WORLD
METROPOLITAN GROWTH FACTORS

The future growth of Orlando will no longer be in concentric rings. The tan color on this map indicates a more likely future growth pattern: a linear development extending from south of Walt Disney World, northward, along I-4, along Beeline to the east, and continuing along I-4 north of Orlando. In fact, it is reasonable to expect a shift of many regional center functions to the developing areas southwest and east of town. The regional entertainment and educational centers have already shifted to Walt Disney World and Florida Tech. It is possible that regional offices, medical services, cultural activities and other functions will follow.

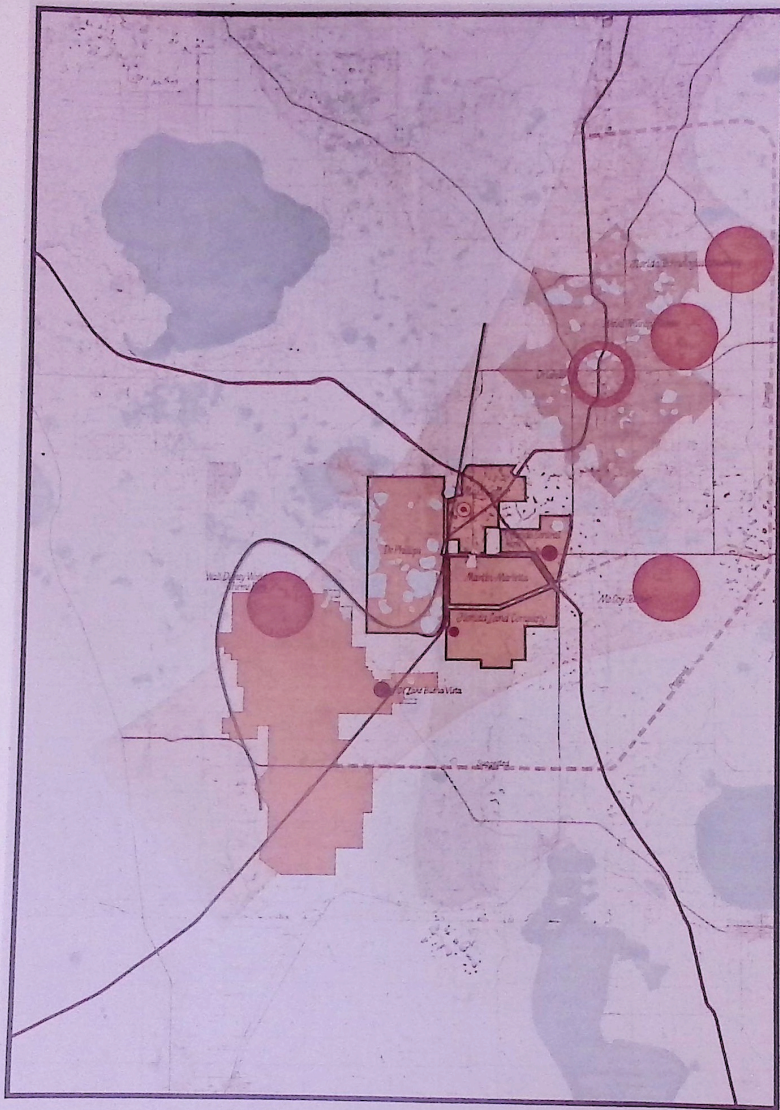
This likely shift produces great opportunities. At the same time, it will produce many problems. The most pressing of these will be rapid overloading of I-4 and Beeline highways. Many proposals for relieving I-4 have already been made, from increasing its capacity to building various bypass routes to the west of Orlando and west of Walt Disney World. This map indicates another alternative worth investigation: a bypass to the south and east where the new growth will be concentrated, providing services directly to Walt Disney World, the jetport, Florida Tech and the Training Center.

A longer range, but perhaps more important, regional issue will be balance of the Central Florida water supply. Much of the area west and north of Walt Disney World (indicated by the green boundary line) is astride the prime recharge areas of the Florida Aquifer. Urbanization in this area will reduce its recharge capacity at the same time that the demand for pure water is multiplying. Although the Disney property is outside the prime recharge area, the presence of Walt Disney World has created strong urbanization pressures in the critical area. All of the I-4 bypass proposals that call for new highways to the west of Orlando would vastly increase these pressures by "opening up" the land for development. This issue is likely to be bitterly contested in the future with serious implications for all developers in the region.

In addition, WDW can be adversely affected by the actions of developers on surrounding property. We have already seen the negative impact of highway billboards. The billboards could shortly be supplemented by even more unplanned, unattractive, inefficient and blighting urban sprawl. Further, with the new demands placed on roads, utilities and public facilities, property taxes will be increased by hard-pressed local governments.

The point is that the company has a stake in all of these issues. An active, informed policy of enlightened self-interest and participation is a necessity to protect the company's investments.

19 Metropolitan Development Considerations



WALT DISNEY WORLD

METROPOLITAN DEVELOPMENT CONSIDERATIONS

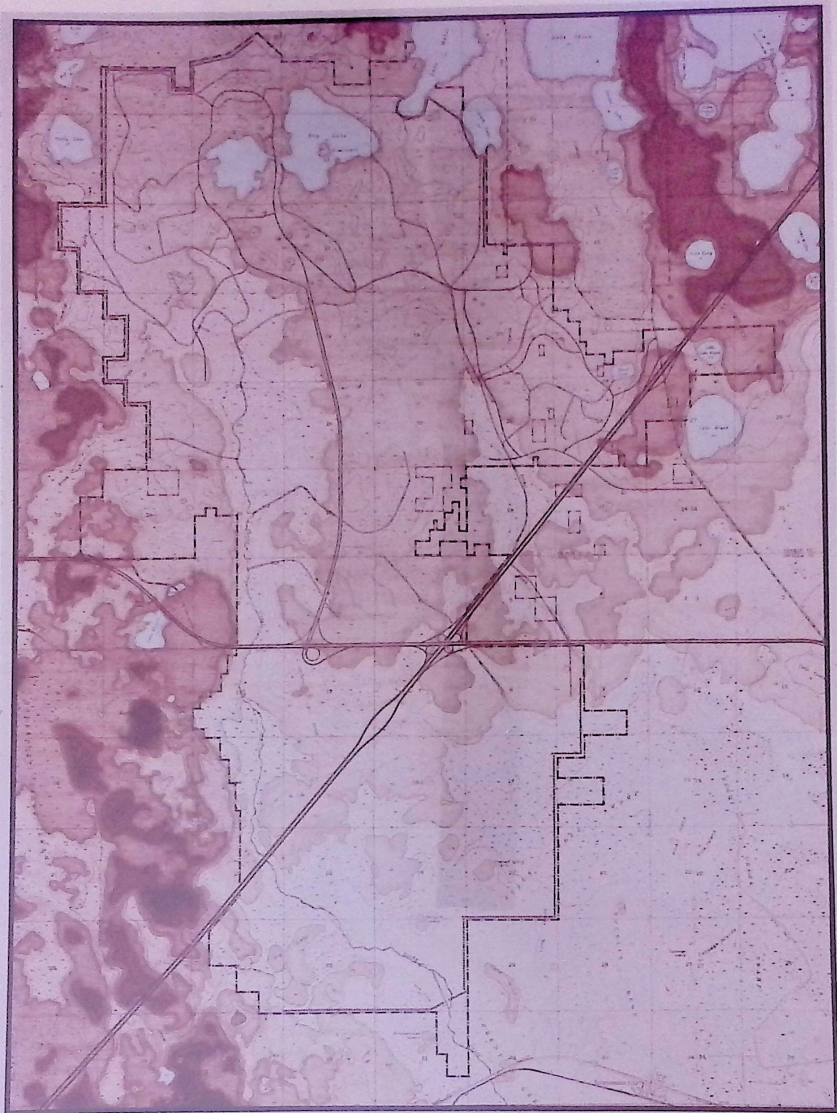
THE LAND AND ENVIRONMENT

The next maps summarize some basic facts about the land and environment. They are primarily a composite of what was available in U.S.G.S. maps, a good soils survey in Orange County, a very sketchy soils survey in Osceola County, and a number of recent ecological analysis of central Florida, as well as special studies commissioned by the Disney organization.

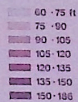
This study is preliminary overview. It should be followed by a series of detailed studies which together will give a comprehensive view of natural conditions and processes at work on the property and around it. Those studies are basic input to any detailed master planning. The objective is to plan new development so that a controlled transition is made to a new, productive ecological balance on the land, which includes the activities of Walt Disney World.

Topography

This map shows the very flat land of the Walt Disney World property in contrast to the surrounding low sand hills. It shows the higher ground in the center of the property and how it is separated by the drainage patterns of Bonnet Creek and Reedy Creek. The contour interval is 15 feet.

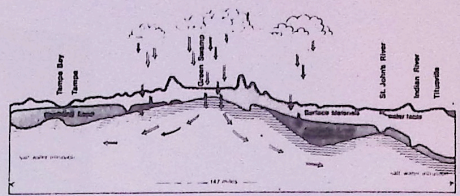


WALT DISNEY WORLD
TOPOGRAPHY



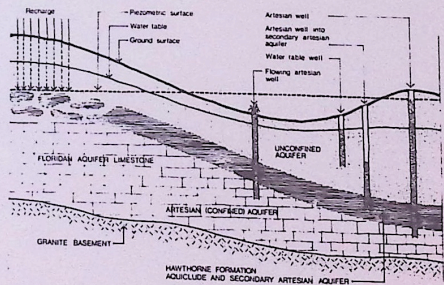
Hart-Krivatsy-Stubee October 1971



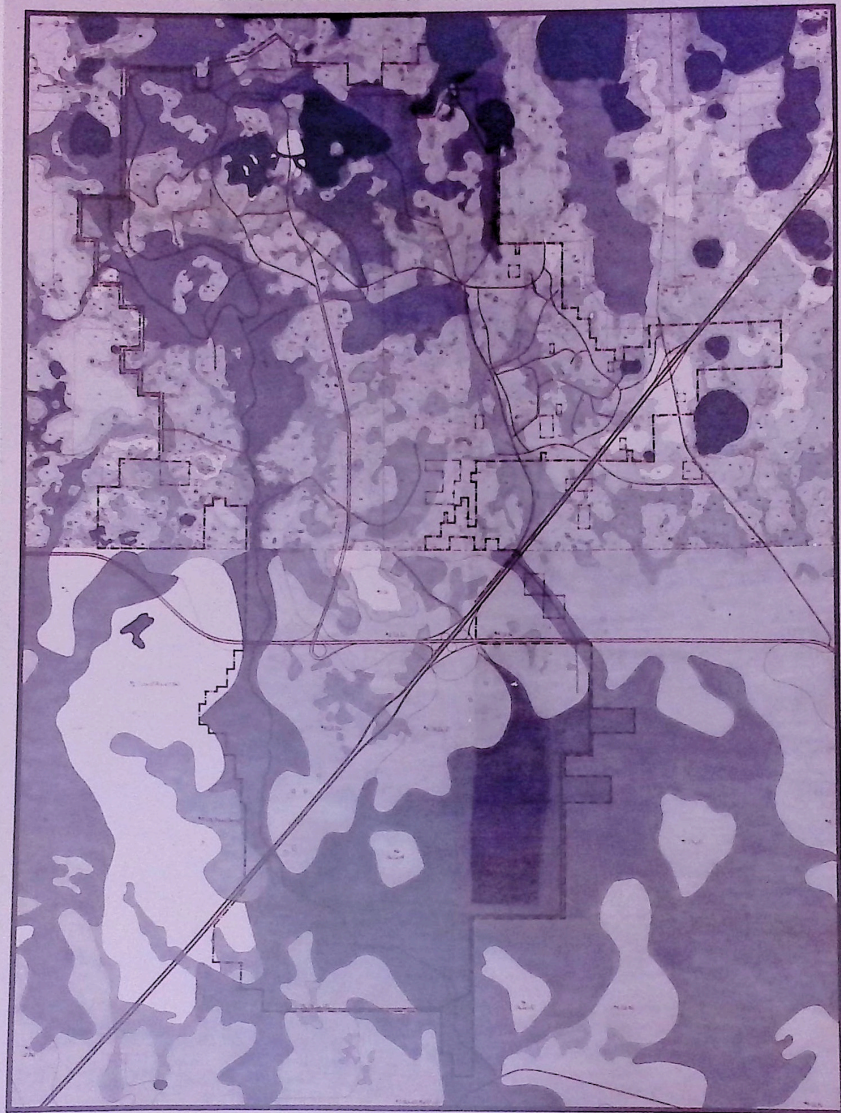


One of the principal issues raised by any development in Central Florida is water supply. The principal source of water for the entire region is a deep-lying bed of limestone known as the Floridan aquifer. This aquifer is recharged largely by rain falling on the sand hills and other areas north and west of the property. Fortunately, very little, if any of the prime recharge area is within Walt Disney World. Thus the company's development programs will have little direct effect on the aquifer. Prior to development of any land mapped as prime recharge areas within the property, shown in white and pale blue, sub soil conditions should be investigated to determine whether they are in fact serving that function. If so, they should have development restrictions designed to maintain their effectiveness.

Almost every large urban area has a water "problem" -- usually in connection with both quantity and quality -- and as a major land owner and developer, Walt Disney World will be involved here. The company has already taken steps to find ways to conserve water, and continued water management will be an important part of any development program.



TYPICAL AQUIFER IN ORANGE COUNTY



WALT DISNEY WORLD DRAINAGE AND RECHARGE

- EXCELLENT: PRIME RECHARGE
- VERY GOOD: PRIME RECHARGE
- GOOD: SECONDARY RECHARGE
- POOR
- POOR
- SWAMP
- LAKE

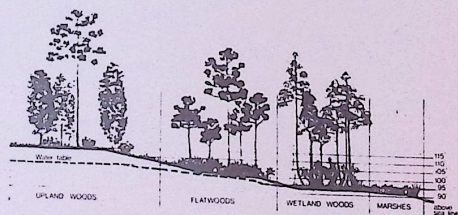
Hart-Krivatsy-Stubee October 1971



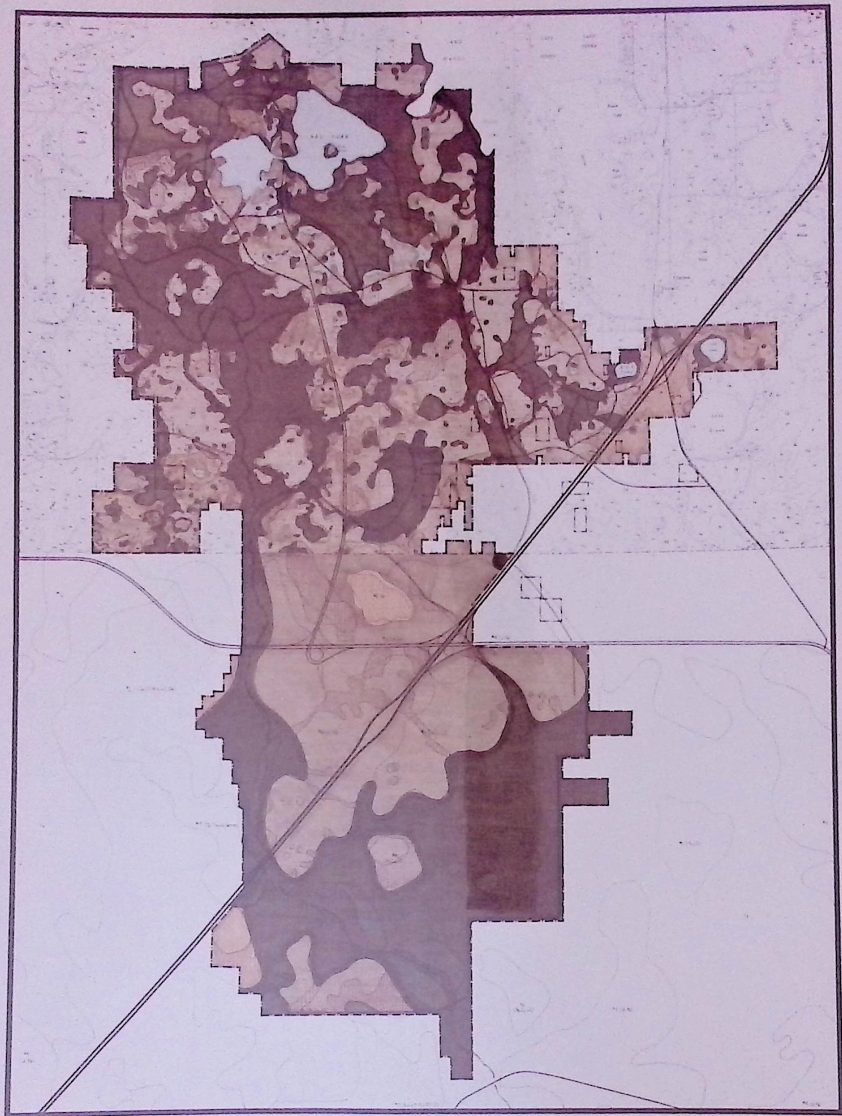
Woodland Suitability and Wooded Areas

This map shows the soil types and plant communities that have evolved out of the workings of the climate and geology of this area. There are three principal types of land/vegetation systems:

1. the "wetwoods", the low, wet, heavily wooded areas, usually with deep muck, which normally have been flooded most of the year;
2. the "flatwoods", the higher ground, much of it seasonally flooded with pine woods, parts of which have been cleared for grazing;
3. the "uplands", the well-drained areas where the oaks are located and some orange groves have been planted; some of these may also be recharge areas for the deep aquifers.



PHYSIOGRAPHIC REGIONS AND ASSOCIATED VEGETATION



WALT DISNEY WORLD **WOODLAND SUITABILITY AND WOODED AREAS**

- UPLAND WOODS
- FLATWOODS
- WETLAND WOODS
- MARSHES
- EXISTING WOODS

Hart - Krivatsy - Stubee October, 1971

Land Suitability Summary

This map interprets the findings illustrated in the preceding three and classifies the land according to its suitability for development. The low "wetwoods" area, the dark green color, should be disturbed the least: first, because development here would cause major changes in the natural conditions, construction would have a significant and irreversible impact; second, because development here would be most costly; and third, because these areas with their forests and potential waterways are important scenic and recreational assets essential to the overall environment of Walt Disney World. The lakes, of course, are similar kinds of assets. The term "preservation" does not mean no construction, but construction and development compatible with preservation of the basic eco-system.

The "flatwoods", the bright yellow, are the areas indicated as "best" for construction because they will be best able to adapt to development and to people. The seasonal flooding can be - and has been - controlled without serious effects. These areas are also probably least costly to build on. The light yellow and the light green colors indicate the uplands; if proven to be recharge areas, development here should be limited to preserve the recharge capacity. Studies now underway should indicate the proper balance between construction and "uncovered" land.

These kinds of land classifications are being used in the Lake Buena Vista project as a preliminary basis for the land use system, pending further studies. This is one important way to work with the land, with nature.



WALT DISNEY WORLD LAND SUITABILITY SUMMARY

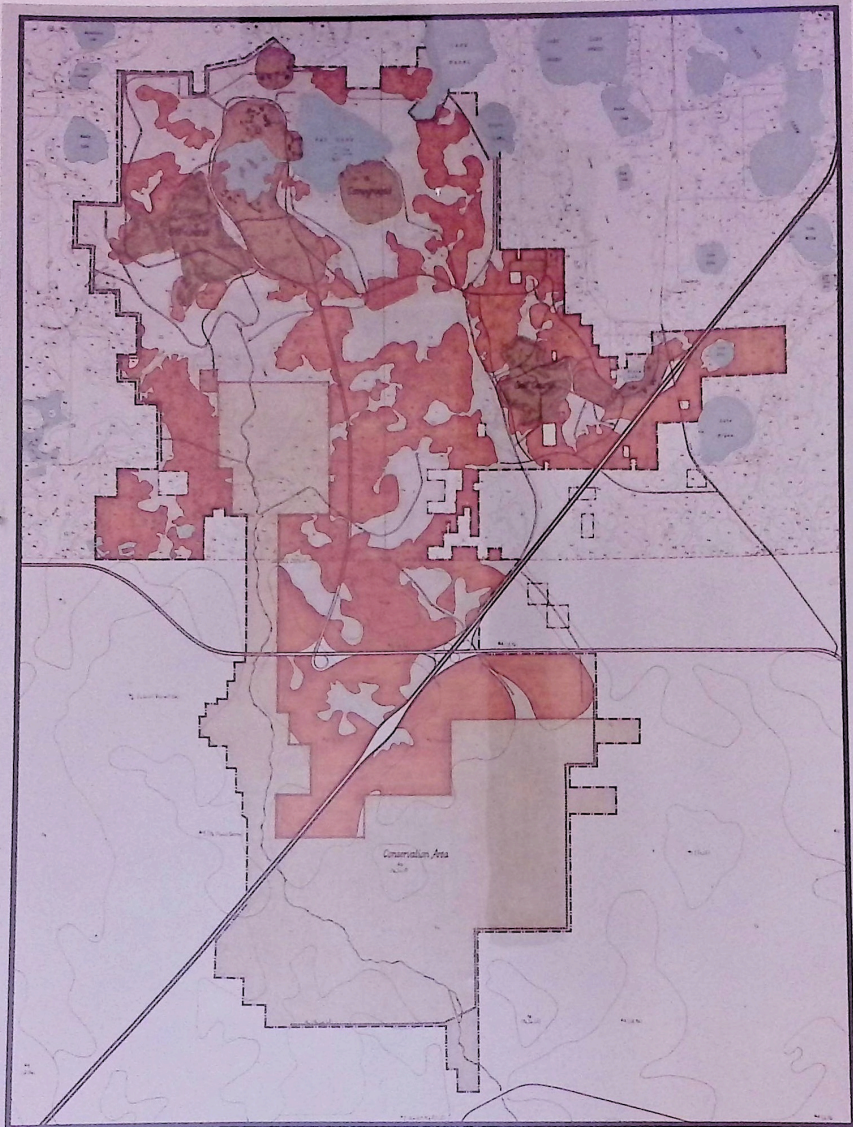
- BEST CONSTRUCTION
- LOW DENSITY CONSTRUCTION
- SECONDARY RECHARGE AREA
- RESTRICTED CONSTRUCTION
- PRIME RECHARGE AREA
- PRESERVATION AND ISOLATED CONSTRUCTION

Hart-Krivatsy-Stubeo October, 1971

Committed and Available Land

The previous maps have illustrated the primary characteristics of the land and the disciplines they impose on development. Other parts of the land have already been committed to specific uses.

On this map the areas already committed to the Conservation Area, the Theme Park, resort hotels, parking, campgrounds, motels, golf courses and vacation housing have been combined with the natural restraints of the land to indicate how much property is still available and where it is. The orange color represents the remaining available land that is readily suitable for development, it totals 9,200 acres. The pale green color represents available land that is less suitable for development and more suitable for either preservation or restricted construction and use. This category totals about 7,200 acres. In summary, this is a tentative zoning map, establishing a beginning point for physical land use planning.



WALT DISNEY WORLD

AVAILABLE LAND

9200 ACRES AVAILABLE READILY DEVELOPED LAND
 7100 ACRES AVAILABLE DIFFICULT TO DEVELOP LAND

Hart-Krivatsy-Stube October 1971

0 1 2 3 4 5 6 7 8 9 10

DEVELOPMENT STRATEGIES

The growth of Central Florida and the emerging urban pattern of the Orlando region added to the first stage construction of Walt Disney World have together established a basic value and, with careful management, an almost unlimited potential for the Disney land. Ultimately, however, the value of the land asset depends on what the company decides to do with it.

The present company policy toward the land as we understand it, has three major parts:

1. Attractions. The company will continue to do what it does best: build and operate attractions that draw people to the land. This includes development of support facilities and continued improvement of the land as a showplace.
2. EPCOT. In a sense every part of WDW is a step toward EPCOT, but special efforts will be taken to: (a) build up the economic base needed for EPCOT and (b) begin experiments in new "community" building. Lake Buena Vista is the first such project; it takes advantage of the "attractions" to provide economic and operational foundations for EPCOT.
3. Protecting the land. The company will attempt to keep open the full EPCOT opportunity by: (a) keeping intact the "central ridge" property between Bonnet and Reedy Creeks, the land identified by Walt Disney as the EPCOT site; (b) taking steps needed to protect the powers of RCID; and (c) finding ways to minimize land holding costs, thus allowing the time needed to develop -- and continue redeveloping -- EPCOT.

Basic Land Policies

One other part is needed to complete the land policy: an overall "development strategy". In order to make each new attraction, each support facility, each new Lake Buena Vista Project or land management activity add up to an efficient effective use of resources -- in order to make the best step-by-step decisions -- there must be a general agreement on the direction Walt Disney World is moving.

In other words there must be a tentative, working definition of EPCOT.

The "development strategy" should be based on the major fixed characteristics of the land, the probable future course of the forces shaping regional development, and, of course, on overall corporate strategy.

The next three maps illustrate three ideas for possible future use and development of the land. They are not the only alternatives, nor are they mutually exclusive, but they do reflect three basically different future directions the company could take in Florida. In a sense they are developments of the overall plans already prepared by the company. Based on those original plans the Theme Park and Resorts were built and are expanding, and the "residential area" was started. Other proposals were postponed; others such as a major airport, were ruled out. The question now is what overall concepts will tie the present and future projects together.

Next Generation New Town

This map applies to the property planning concepts that are evolving out of the British and American "New Towns". EPCOT, in this case, would consist of selected experiments within a more conventional and proven community setting. This is a conservative, practical approach and would probably make the company a lot of money. Walt Disney World has every condition that new town developers look for; in economic terms it is as close to a "sure thing" as one will find in real estate.

On the negative side, as conventional, competitive land development, this approach might endanger parts of the special RCID legislation. More important, while the company could design a superior "new town": including an innovative "next generation" new town, that is not what the Disney organization can do better than anyone else. It does not involve creating and engineering a whole new way of doing things.



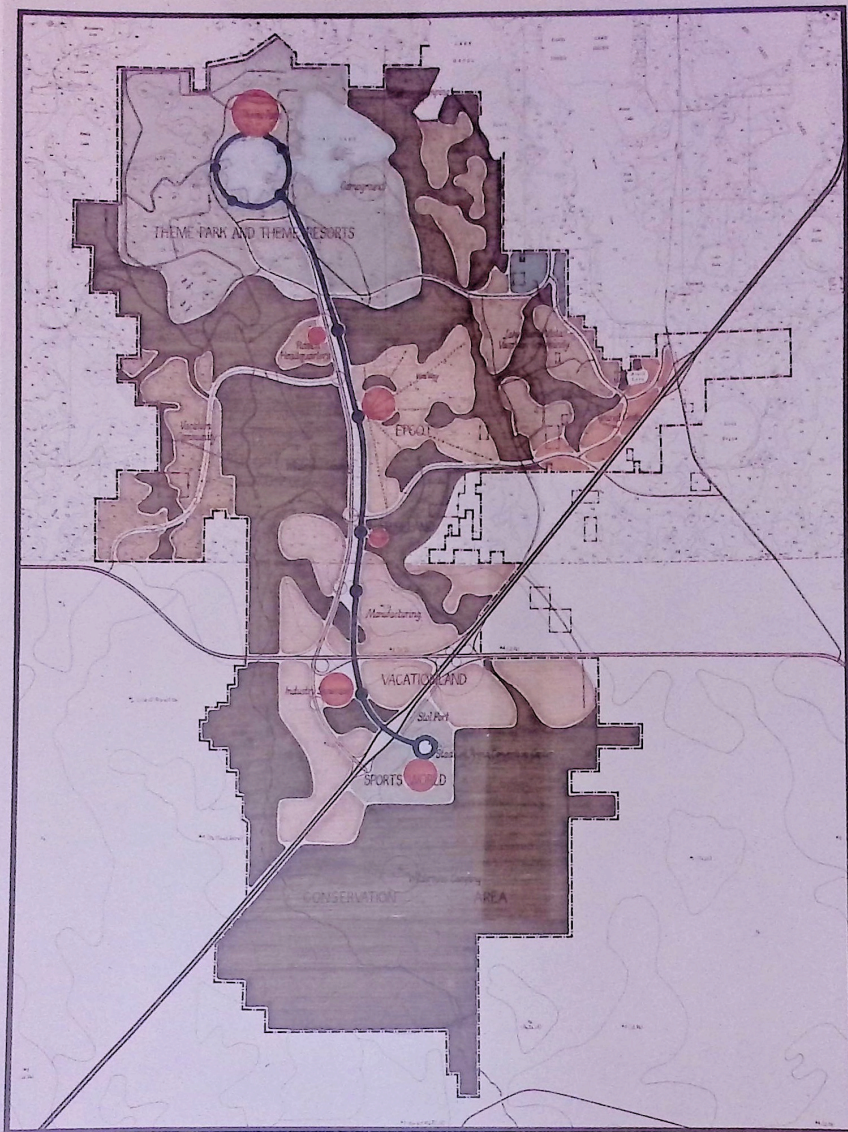
WALT DISNEY WORLD
DEVELOPMENT CONCEPT
"New Town"

This idea is to build a "recreation world", a vacation and recreational "capital city" where the best in all kinds of recreation and recreational equipment can be found. This approach carries out the spirit of the original Walt Disney World concepts; it is within the spirit of the RCID legislation, one of the land's prime assets; and it is something the Disney organization could do better than anyone else in the world.

As illustrated here, the concept includes:

1. Continued growth of the Theme Park and Theme Resorts.
2. Use of "preservation" and "conservation" areas for a "Natureland"; this could be educational and scientific entertainment activity based on the type of approach that has made Disney nature movies successful.
3. Use of preservation areas for a working ranch; this could provide another kind of "show" with a very low investment; it could be another kind of themed resort, and it could handle the land management operation.
4. A "Vacationland" industrial complex, which includes a permanent sports and boat show, as well as research, development and manufacturing of vacation and sports equipment of all kinds; this could become the shopping center for recreation goods for the whole country.
5. A sports (and convention) complex with stadium, arena, convention hall and associated facilities; this might be a possible site for the Olympics, major national conventions, and other important national celebrations.
6. Three vacation home communities; the first of these is Land Buena Vista; another would incorporate, in a concentrated form, the EPCOT ideas, offering a totally new kind of second home community as well as another "show".
7. A system of trails, waterways and campgrounds.

This concept includes innumerable "experimental" and "prototype" opportunities, but all in a recreational, entertainment, vacation oriented context. It offers partnership-with-industry opportunities. It provides ways to bring many more and different kinds of people to the property -- all with reasonable capital investments by the company in basically familiar fields.



WALT DISNEY WORLD DEVELOPMENT CONCEPT

"Recreation World"

Prototype City

The third idea is a more difficult one. It takes literally the idea that EPCOT will be a place that shows urban life as it will be -- or could be -- 25 years in the future. It involves analyzing and experimenting with the major systems of an urban society -- such as education, government, health care, social relationships -- as well as technology and environment.

The diagram here suggests some principles of such an approach applied to the land: a way to start with a reasonable investment and to move ahead step-by-step with a complete community, experimenting at each step; a system for making land use and transportation experiments; a variety of different ways of organizing urban communities; and ways of relating them to the surrounding region.

Many people are talking about and planning so-called prototype cities. Few will have the opportunity to build one. Walt Disney World may be the only place that combines the critical conditions: a large area of land, the strong, sustained market demand of a growing region, and a legal framework that allows experimentation. The company has had the foresight to create the conditions that would make an experimental prototype city possible. And there is unquestionably a desperate need in our society for such a place. Nonetheless a true prototype city is an enormous and difficult undertaking.

MOVING AHEAD WITH PLANNING

Starting the Planning Process

The preceding maps and graphs outline the basic land use and development issues facing the Company. Their primary purposes was to provide a background for defining the next steps that need to be taken within the company to move ahead with planning. The recommended steps are outlined below.

Step 1.

The first step is for the management group to review and evaluate the preliminary work that has been done and agree on an initial work program. Specific recommendations are in the next section of this memorandum.

Step 2.

Responsibilities for each segment of the initial work program should be assigned. It is contemplated that most of these items would be assigned to existing staff within the various divisions of the company.

Step 3.

A "coordinator" for WDW planning should be named. This person would pull together all of the work done within the company under the various assignments and would draw in outside specialists as needed. He would report regularly on progress to the management group. He would be -- or would have assigned to work with him -- the spokesman and leader of efforts to coordinate Walt Disney World development with surrounding land owners, public agencies, conservation groups and the general public. In order to fulfill his role, the coordinator should live in Florida. In Florida he and his staff would be thoroughly familiar with the land, the impact of projects, local law and local economics. Further, he would be fully conversant with regional development and political issues. He should also have a California counterpart with whom he communicates on a regular basis. The coordinator, of course, is not "the planner"; he provides the organized staff assistance needed for the management group to make and carry out plans.

Step 4.

The most important and most difficult step is to begin the process of debate and deliberation that will lead to three key decisions: (1) the definition of EPCOT and the Company's objectives concerning this aspect of Walt Disney World; (2) the Company's role as a pacesetter in regional development; and (3) the Company's response to the economic and population growth of the region, for example, to the demand for resident housing in the area. These decisions will add up to a tentative, feasible, but specific long range development strategy for Walt Disney World. The strategy would not, of course, be the subject of public announcements; its purpose is simply to unify and guide the Company's activities.

These strategy decisions, as they are made, will make it possible to proceed with financial planning and marketing programs, overall land and site planning, project plans and designs, project engineering and specific EPCOT research. In the meantime, the initial work program should be started; it will be needed no matter what future course is selected.

The work program consists of six basic items summarized below. Specific recommendations regarding the content of each of these work items have been included in other documents.

1. A land and water management program should be organized, given priority and assigned a staff to take responsibility for managing, farming or maintaining unused land and open space, coordination of pollution control and pest control programs, and implementing recommendations of the ecologist and engineers on preservation of the natural environment. Continuing research should be an important element of this program.
2. A centralized system of comprehensive land records and mapping should be established within the company. This should include computer storage of land data, a library of all engineering and planning documents about the project, and complete aerial photo and mapping records. Survey crews should continue to map and record information about the entire property; a standardized mapping procedure should be implemented (parts of such a system have already been designed for Buena Vista Land Company) and the record keeping system designed. If it is comprehensive and kept up-to-date, the future cost savings of such a program could be enormous.
3. A staff economist should be assigned to organize and operate a program of on-going economic data collection and analysis that would be computerized for ease of updating and information retrieval. A computer development model would be started with existing information on economic relationships, competition and market opportunities. Gradually, it would be expanded to include investment analysis and cash flow analysis of development proposals. An outside land economist, experienced in this type of model building, may be needed to help initiate the program.

Recommended Work Program

4. The preliminary studies of the land and its ecology have defined a number of specific questions that can be answered only by experts in the various fields. Authorization to identify and retain these experts is needed. Company staff should be assigned to assist the experts with necessary field work. The results should be compiled and interpreted to produce a "land development handbook", in effect a more refined preliminary zoning map and a set of in-house regulations to guide the company's use of land. This document would describe how improvements--roads, buildings, drainage systems, etc.--should be designed on each type of land to take into account the protection of the environment. In addition, a comprehensive document should be prepared recording the analysis, precautions and positive actions of the Company in this area. Both are a continuation of the preliminary work already begun.

5. A high level representative of the Company should be specifically assigned to keep management informed of regional development issues, formulate a company participation in these issues, and deal with the outside agencies, groups and individuals who are concerned with regional development. This representative should have access to the best technical advice on traffic planning for highway and interchange location and design; land use planning and legal counsel on development controls and legislation, ecologist and natural scientists on water and pollution issues. His role would not imply massive intervention in local issues but rather a carefully considered Company response to issues that will affect Disney interests in the long run. If, for example, overdevelopment or badly planned growth around Walt Disney World overtakes the water supply, highways or public services, all landowners will be affected and many of

the opportunities now facing the Disney organization may be lost. On the other hand, with the Company's leadership, the whole region could benefit.

6. The planning coordinator should outline a program of EPCOT research.

Once these work items are well underway the planning team will begin to emerge, and the Company's development strategy will become more specific. At that time the management should again review the overall planning process and re-shape it around the long term objectives.