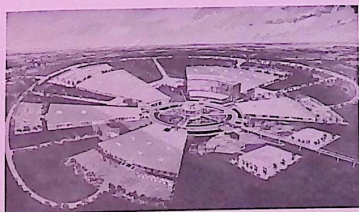
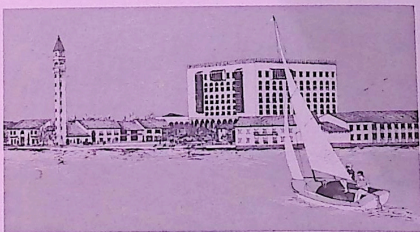


*master planning for*  
**Walt Disney World**





*master planning for*

**Walt Disney World**

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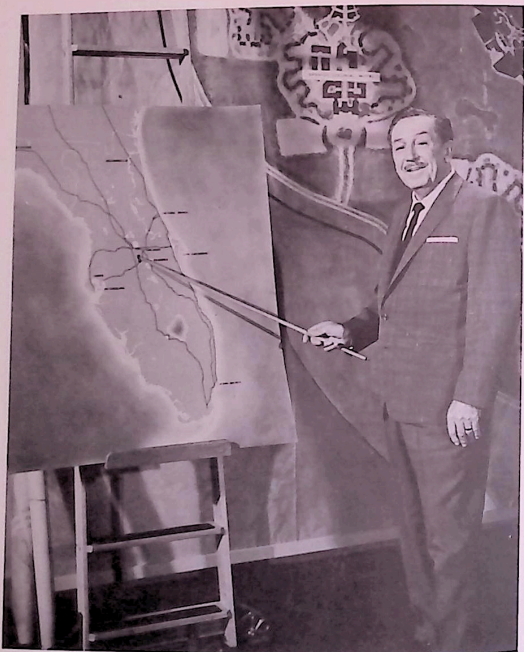
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SECTION I

MASTER PLANNING  
WALT DISNEY WORLD

THE MASTER PLAN



*Florida Concept Revealed by Walt Disney in 1965*

*Remarks by Roy O. Disney  
Chairman of the Board, Walt Disney Productions,  
at the:  
Walt Disney World Press Conference  
Orlando, Florida - April 30, 1969*

For many years we thought there should be only one Disneyland. But as time passed, experience told us that there were about 100 million people in the east and midwest and south who would never get out west, and therefore would never have the opportunity to see Disneyland. And so, after the great success of the Walt Disney shows at the New York World's Fair, we finally decided to bring some kind of Disney entertainment approach to the East on a permanent basis. And eventually it grew and grew and became not just a Disneyland, but a whole new world of Disney entertainment and recreation.

Many potential sites for this project were studied before we finally decided Florida was the place to build our new concept. Here we can operate all year 'round, just as we do in California. And here in Florida, you already have a great appeal to vacationers. In fact, Florida had three times as many visitors last year as Southern California had.

Before we purchased the land for Walt Disney World, we studied how we might prepare this kind of land for development.

Walt was with us at the time. We traveled all around Florida looking at what other people have accomplished with similar land conditions. And Walt especially became enthusiastic about what you could do with water in an entertainment complex. He was very enthusiastic about how we could turn the water into a tremendous attraction and asset in our business.

So we have taken this project one step at a time. First, we decided to build a new kind of entertainment attraction ... then we chose the state of Florida ... and then we studied and selected this particular site.

Now for the past three and one-half years, our Company has concentrated on achieving the major *building blocks* for our Florida project. We were anxious to establish a *solid foundation* in the areas of financial planning, legislation, labor relations, preparation of the site for construction, and finally, the creative master planning of Walt Disney World.

Three of these major building blocks deserve special comment.

First, there were areas of legislation. Very important changes were necessary in certain Florida laws pertaining to our type of business, so that we could protect our names and characters. And the nature of our land here made it highly desirable to have an Improvement District formed, as a necessary first step toward accomplishing our overall goals.

In this legislative program our Company has enjoyed wonderful cooperation from officials of the state of Florida, from the Governor on down. I'm pleased to say that the required programs have been developed and passed by the Florida Legislature.

Second, there was the area of labor relations ... and this very well could be the most important building block of all. It would have been folly to undertake a project of this size and scope without a project labor agreement. And so our representatives spent many months ... long, difficult months ... bargaining with the presidents of the national building trades in Washington, and with representatives of the local building trades.

Today, I am most pleased to say that we have a strong, no-strike agreement through June 1972, that will make possible the orderly progress of construction in Walt Disney World.

The third building block has been the financing of Walt Disney World. Our Company is relatively small, but Walt Disney Productions has been successful and has enjoyed orderly and considerable growth over the years. We have a cash flow of about \$20 million per year, and our credit is good. But because we needed more funds for this project, we went into the "money market". Over the past 15 months, we have sold two issues of convertible bonds totaling \$90 million. When converted, these bonds will represent close to 20 percent equity in our Company.

To this solid foundation, one more building block should be added. I'm proud to tell you that the organization Walt Disney built is ready, capable, and anxious to carry out his plans for this exciting project.

You should know that the dedication of our staff to Walt's goals is tremendous. And, I know Walt would like what his creative team is doing, because these are the ideas and plans he began. Everything you will see here today is something Walt worked on and began in some way. And today, the Walt Disney organization is dedicated to carrying out these wonderful plans in Walt Disney World.

## 27,000 ACRES:

### KEY TO MASTER PLAN IS "THE BLESSING OF SIZE"

"There's enough land here to hold all the ideas and plans we can possibly imagine," Walt Disney said about the land acquired for Walt Disney World. And in the Master Plan for these 43 square miles, developed in concert with the designers, architects and engineers of WED Enterprises, Walt Disney incorporated the ideas and philosophies of a lifetime.

Walt Disney World is dedicated not only to how people play; but also to how they live and how they will work.

In land area, Walt Disney World encompasses approximately 27,000 acres -- an area twice the size of Manhattan Island, and about the same as the city of San Francisco.

Because of its size and scope, the Master Plan for Walt Disney World will take many years to complete. At its ultimate development, it is planned to include:

- a complete "vacationland," encompassing theme resort hotels, motor inns and camp site accommodations, and featuring a wide variety of land and water recreation facilities;
- within this Vacation Kingdom, a family theme park similar to Disneyland in California;
- an entrance and reception complex to receive and welcome all guests;
- an "airport of the future," offering service to private and executive aircraft as well as commercial "commuter" service;
- an industrial park designed to showcase American industry at work;
- a transportation system carrying guests from place to place, linking the many attractions of Walt Disney World;
- and an Experimental Prototype Community of Tomorrow (EPCOT) where, as Walt Disney said, "People actually live a life they can't find anywhere else in the world today."

"Phase One" of Walt Disney World -- the entertainment-vacation complex -- will open in October, 1971. The project is being master planned and designed by WED Enterprises, Inc., the Disney architectural and "Imagining" subsidiary which designed California's Disneyland. And, when open, the operating staff will be trained and directed by the most experienced team in the outdoor recreation field -- the key members of the Disneyland staff.



#### PHASE ONE:

##### WALT DISNEY WORLD CREATING NEW CONCEPT FOR "DESTINATION RESORTS" IN CENTRAL FLORIDA

A completely new kind of vacation experience will be offered to Florida visitors and residents alike when Walt Disney World opens in October, 1971.

Conceived as a destination resort for the traveling vacationer, "Phase One" of Walt Disney World's development will be built around a proven success -- a "theme park" that will include many unique attractions of its own, as well as some of the most popular features of California's Disneyland.

In this complete vacationland, the new "Magic Kingdom" theme park will be *just one of many* entertainment and recreation attractions. In Walt Disney World, guests will not only *play*, but will also *stay* in a "Vacation Kingdom" that caters to the needs of visitors who stop for only a day ... and guests who stay for a week or more and use Walt Disney World as headquarters for their vacation in central Florida.

A major contrast to California's Disneyland will be the interrelationship between the theme park and the nearby hotels. Both will become part of the same "world" of entertainment and recreation activities. A transportation network -- monorail, water craft, and land vehicles -- will link the hotels to the entertainment magnet, the new "Magic Kingdom" theme park.

The hotel "theme resorts" -- so called because each is being planned around a single theme that represents a culture or architectural style around the world -- will offer far more than simply convenience of location to the new "Magic Kingdom" and its attractions. In design motif, food specialties, recreation activities, convention facilities, and even the type of entertainment to be presented, these major hotels will complement each other and the attractions of the theme park.

Guests visiting Walt Disney World will leave their automobiles either at a day-visitor parking center (located nearly one mile from the theme park entrance) or at their hotel, in the case of vacationers staying in one of the theme resorts.

From the parking center or their hotel, visitors will travel to the new theme park primarily by means of the elevated Walt Disney World-Alweg Monorail trains. By interconnecting the major areas, attractions, and accommodations of the Vacation Kingdom, the monorail serves a dual purpose. First, it provides a means of access to the theme park and hotels. Second, it will be an attraction in itself -- an excursion-tour introducing all the adventures awaiting the visitor in Walt Disney World.



WALT DISNEY WORLD... This model shows details of the Destination Vacation Resort, which will comprise Walt Disney World - specifically, those facilities to be constructed on a site sixteen miles southwest of Orlando, Florida, before and during the first five years of operation. Opening date is expected to be in October, 1971. Focal point for the entire "Vacation Kingdom" will be a new lagoon (center), three-quarters of a square mile in size, around which will be constructed a new amusement theme park (upper left) similar to California's Disneyland, theme resort hotels and an entrance complex. A transportation network - monorail, water craft, and land vehicles - will link these attractions with complete facilities for outdoor recreation and entertainment on both land and water (the golf complex may be seen in the foreground).

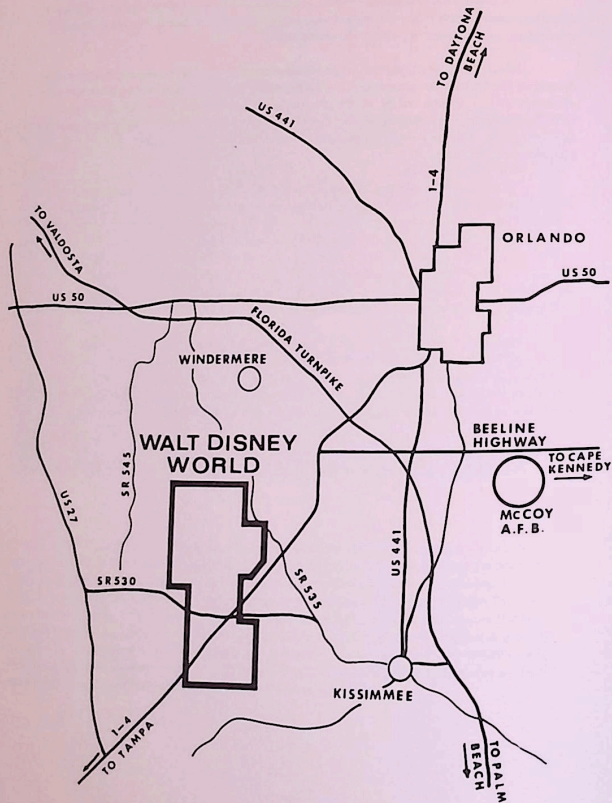
The designers and planners of WED Enterprises, the Disney architectural and engineering subsidiary where California's Disneyland was designed, have conceived a "Vacation Kingdom" oriented to land and water recreation and entertainment.

*On the land*, in addition to the family adventures of the new theme park, plans are being developed for 18-hole championship golf courses, stables and bridle trails, nature tours that take advantage of the pristine beauty of the property's wilderness areas, and a full complement of recreation activities, including swimming, tennis, archery, bicycling, and camping. The hotels will offer nightclub entertainment and dancing; and nearby, there will be theatres presenting motion pictures and stage shows.

*On the water*, the natural sports potential of Bay Lake and the area surrounding it is being expanded and extended into a three-mile pleasure waterway dotted with natural and man-made islands. In its new form, the waterway will become the focus of water spectacles and sports, while at the same time retaining its often spectacular beauty.

In addition to boating, sailing, water skiing, fishing, and other water sports, the lake and lagoon have already been lined with broad, sandy beaches for sunning and swimming. The waters of the lake and lagoon will be kept crystal clear for the enjoyment of water sports enthusiasts.

In concept, Phase One of Walt Disney World is being designed as a complete family "Vacation Kingdom" ... a place of *entertainment*, crowned by a new theme park similar to Disneyland ... a place of *recreation*, where land and water sports abound ... and a place of *relaxation*, catering to the needs not only of the guest who comes for the day, but planned and oriented around activities for those who stay here for part or all of their family vacation.

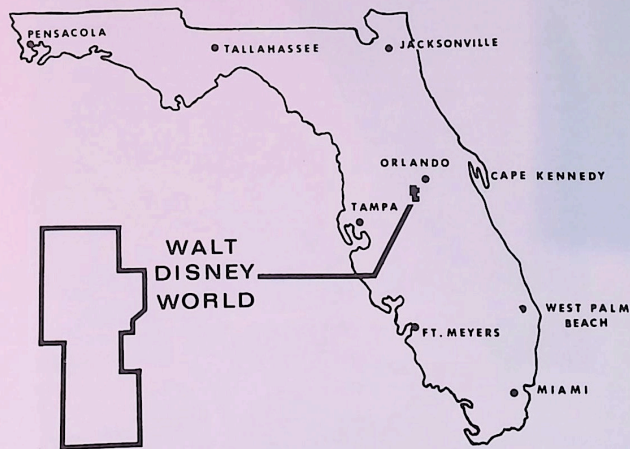


WALT DISNEY WORLD VICINITY

OCTOBER, 1971

## A VISIT TO WALT DISNEY WORLD

*(When visitors arrive late in 1971, they'll enter the Walt Disney World property about a mile from the Interstate 4 -- State Road 530 intersection. For the next five miles, guests will travel along a scenic boulevard, moving north to the Vacation Kingdom's main entrance information and parking center. From that point, this is what a first time visitor might see in his first look at Walt Disney World.)*



WALT DISNEY WORLD IN FLORIDA

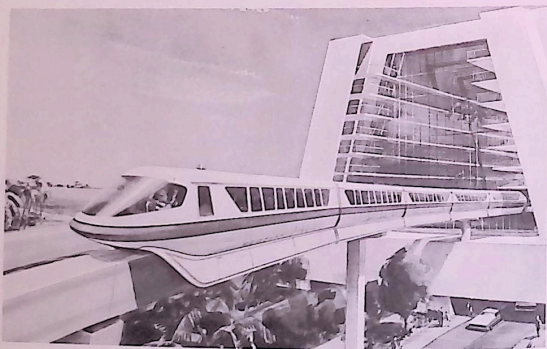


Enter Walt Disney World and leave the world of today behind. Your visit really begins aboard a monorail train, departing from the main entrance station a mile or so distant from the new "Magic Kingdom" theme park.

In moments, your Walt Disney World-Alweg Monorail is riding over a scenic "highway in the sky," and you are looking across a vast "Vacation Kingdom" -- 2,500 acres of resort and recreation land, stretching nearly three miles from east to west, and almost two miles from north to south.

At the visual center of this vacationland stands the new "Magic Kingdom" theme park. Surrounding it, strung out like separate jewels on a necklace, are the major "theme resorts" of Walt Disney World. Although each is distinct in the architectural and cultural concept it represents, the resort hotels are interlaced by a network of land and water transportation systems. In Walt Disney World, distant Asia and the island world of Polynesia are but minutes apart.

Your monorail train is a window onto this world. As you travel along toward the entrance to the theme park, you are introduced to the international theme resorts ... and to all the recreation activities of this Vacation Kingdom. Thus the monorail serves a dual purpose in Walt Disney World -- first as a means of access to both the theme park and the hotels ... and second as an excursion tour, introducing all the adventures awaiting the vacationer staying in this new destination resort.



*Monorail Trains will Connect all the Theme Resort Hotels and the "Magic Kingdom" Theme Park*

Rich in water, Walt Disney World has harnessed the beauty of its natural environment for sport and for entertainment. From your seat aboard the Walt Disney World-Alweg Monorail, you can see the boating, sailing, and water skiing activities on scenic Bay Lake. The lake, a pristine setting sheltered by towering stands of cypress and pine, is circled by beaches of pure white sand, where visitors are swimming, relaxing in the sun, and water-playing in inlets free from boating activity.

Perhaps the most exciting waterway in this water wonderland is the broad lagoon that flows out of Bay Lake. Here a curving channel a quarter of a mile wide has been carved, separating the theme park and the theme resorts, and over this lagoon all manner of craft are traveling.



Today is a typical day in the Vacation Kingdom. Guests in sailboats have set out on the breeze from the Polynesian-style hotel. Power boats are hauling water skiers; and side-wheelers, launches, and colorful excursion steamers are transporting guests between the theme park and their hotels. When the sun sets, these steamers will continue to travel up and down stream, carrying guests on the popular evening pleasure excursions.

Tonight is also a special occasion in the Vacation Kingdom -- the annual Dixieland show, one of many special events in Walt Disney World. On these evenings, the lagoon and lake become a matchless "stage" for water extravaganzas ... a three-mile long "parade route" that passes within hailing and viewing distance of all the major hotels.



Although there is a natural emphasis on aquatic-oriented sports, you can see from your monorail train that recreation on land is just as plentiful in Walt Disney World. Championship golf courses challenge amateur and professional alike. There are three-par courses and putting greens at the hotels, and miniature golf for the youngsters. Tennis courts, archery ranges, and areas for shuffleboard and other light recreation are within walking distance of every guest.

Of more interest, perhaps, is the way man and nature have combined in Walt Disney World to create recreation activities. Bicycle and bridle trails lead from each hotel out around the golf courses and through scenic, wooded areas of the site. There are nature tours, and the more adventurous can camp out or join a lakeside barbecue or campfire "sing" at night. And "Blackbeard's Island," in the middle of the lake, is a young explorer's paradise.

This is the resort land that unfolds as you enter Phase One of Walt Disney World. Long before your monorail train arrives at the theme park entrance, your "window on the world" has revealed a land filled with vacation adventures ... an area so rich in entertainment and recreation that it may truly be called, a whole new "Vacation Kingdom."

## "THE MAGIC KINGDOM":

### THEME PARK TO HAVE UNIQUE NEW SHOWS

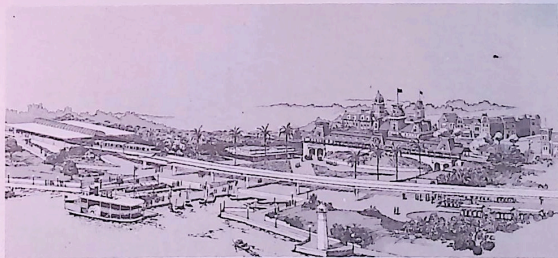
Walt Disney World's "Magic Kingdom" theme park is being planned for an anticipated first-year attendance of eight million people. In size, and in its general shape, it will parallel the park that established a whole new concept in outdoor entertainment, California's Disneyland.

While some of the attractions in the new "Magic Kingdom" will be familiar to the 80 million people who have already visited Disneyland, many more will be unique to this new Disney theme park in Florida.

A major difference will be the first area viewed by guests - the theme park entrance. With guests arriving and departing by monorail trains, water craft, and land vehicles, the entrance will be a bustling transportation center. Here all vehicles will come and go between the parking center, the theme park, and the theme resorts.

At the same time, just a few steps away guests will be departing for a grand circle tour around the Magic Kingdom aboard trains of the Walt Disney World railroad. They'll be old-fashioned trains too, in keeping with the station's Grand Victorian design.

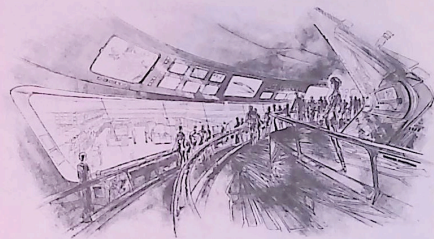
Inside the "Magic Kingdom," visitors will literally bridge time and theme when they step into its six major realms - Main Street, Adventureland, Frontierland, Fantasyland, Tomorrowland, and Liberty Square.



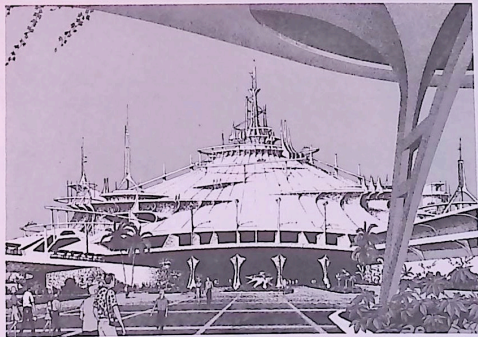
Entrance to "Magic Kingdom"



*Cinderella's Castle --- Gateway to Fantasyland*



*Themed to the World of the Future --- RCA Communications Center*



*"Space Mountain"*

Some of the new concepts now being created by WED Enterprises for the Walt Disney World "Magic Kingdom" are:

*Thunder Mesa*, a spectacular panorama of the old west, where frontier times will live again through a series of exciting adventures. Designed to resemble a "table-top mountain" typical of those on southwestern deserts, it will include a pueblo-style village and several water and land attractions.

*Space Mountain*, 20-stories tall, encompassing a number of adventures and attractions themed to the world of the future in Tomorrowland.

*Liberty Square*, recreating America's past at the time of our nation's founding, where shops and stores will portray the way of life in colonial days.

In these areas and many more, visitors will be entertained in shows "brought to life" by the patented Disney "Audio-Animatronics" process of three-dimensional entertainment. Among these attractions now in development at WED Enterprises are:

*Country Bear Band* -- a foot-stompin' country and western hoedown starring on stage in Frontierland the zaniest troupe of bears ever assembled. They sing and swing and strum the guitars in the finest tradition of wild western musicals.

*Mickey Mouse Musical Revue* -- A spectacular (and nostalgic) visit with 60 of the famous characters from Walt Disney films down through the years. Mickey Mouse, Snow White and the Seven Dwarfs, the Three Caballeros, and all the gang are on stage "in person" to sing the songs and play the music, from "Who's Afraid of the Big Bad Wolf" (The Three Little Pigs) to "Zip-A-Dee-Doo-Dah" (Song of the South).

*Western River Expedition* -- a musical parody of the wild old west in which boat-riding explorers come face-to-face with cowboys and Indians in a frontier fantasy, on the grand scale of Disneyland's "Pirates of the Caribbean."

*One Nation Under God* -- an inspiring dramatization about the American Constitution and the 37 presidents who have led this nation. In the finale, the chief executives appear together on stage in the Hall of Presidents presentation.

The "Magic Kingdom" theme park has been planned so that, as expansion takes place over the first five years, areas already open will not be affected by the park's growth.



*Liberty Square - - - Colonial America Relived*



*Thunder Mesa - - - Panorama of the Old West*

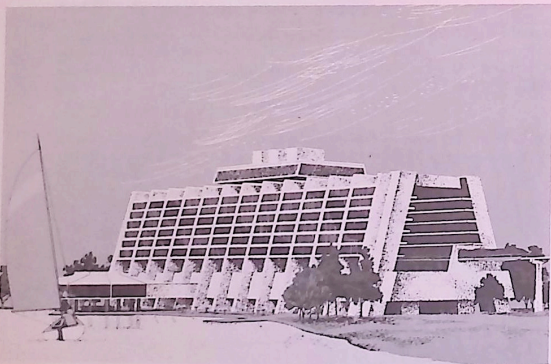
## "THEME RESORTS":

### FIVE MAJOR HOTELS PLANNED FOR VACATIONERS IN WALT DISNEY WORLD

Five major hotels symbolizing the thematic concept of Walt Disney World are now being planned for development in Phase One, the first five years of the project's growth.

Conceived by WED Enterprises, the Disney design subsidiary, and Welton Becket & Associates, architects, the hotels will be complete attractions individually, each with its own recreation activities, entertainment, dining facilities and resort atmosphere. Additionally, guests in any hotel will be able to enjoy the facilities of all others and the attractions of the entire "Vacation Kingdom" during their stay.

The hotels are called "theme resorts" because everything from interior decor to employees' costumes and dining room menus will carry out an overall theme. Two hotels, the Contemporary-style and the Polynesian, will open in the first year. The Persian, Venetian, and Asian theme resorts will follow later to meet the anticipated demand for accommodations.

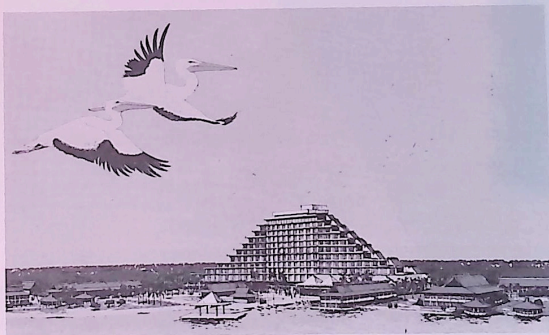


*The Contemporary --- One of Five Theme Resorts*

With the broad appeal of its entertainment in mind, Walt Disney World will provide accommodations ranging from luxurious suites to wooded campsites. A large campsite and recreational vehicle area will be located along the lakefront, offering direct access to beaches and recreation activities.

The largest hotel in Walt Disney World will be the streamlined "Contemporary" theme resort. Its main building is a 10-story high-rise, featuring a spectacular open-mall lobby longer than a football field, with an 80-foot-high ceiling. Walt Disney World-Alweg Monorail trains on the way to the theme park and other hotels will travel directly through the lobby to the station located inside. Shops, boutiques, cafes, and restaurants will ring the open mall.

The 750 guest rooms will offer views of either the theme park to the west, or the scenic lake on the east. In the plans are an elaborate health club, gymnasium, and steam bath. A grand ballroom will seat 1,500 for banquets and 2,000 in theatre-style seating. An elegant dining room will look out over the entire area from the top of the hotel.



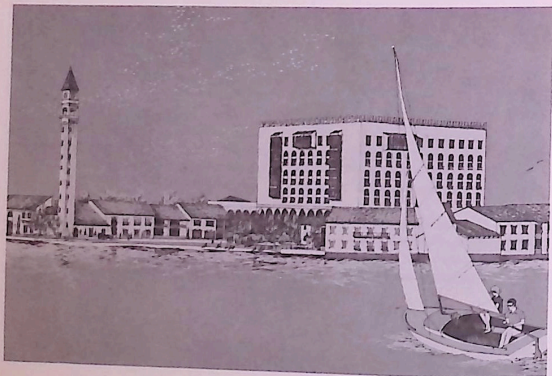
The atmosphere of Pacific Islands will be created in the graceful high-rise structure and two-story "out-buildings" of the 700-room Polynesian-style hotel. Entertainment, food, and decor will carry out the "islands" theme and -- with all its rooms facing the water -- guests will almost literally feel they have traveled to the far Pacific.

Like the other hotels, the Polynesian will provide a variety of recreation activities. Boating will be almost at the doorstep of many rooms, and the Vacation Kingdom golf courses will be located close-by. A special highlight for many visitors will be the scuba-diving pool, where guests will be able to participate or watch through special underwater viewing ports for spectators.

The concepts for three additional hotels are already defined, but will be undertaken only after experience and visitor preferences are studied through the day-to-day operation of the Contemporary and Polynesian-style resorts.

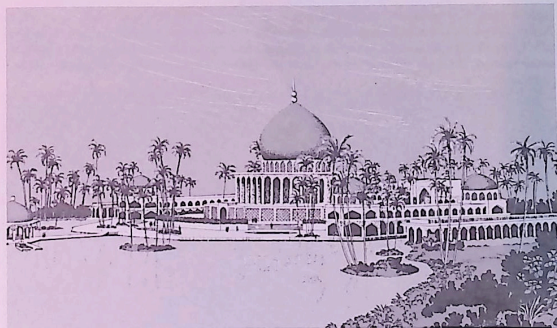


The Asian hotel will be strongly Thai in its motif. A theme restaurant and cocktail lounge at the top of its 160-foot tower building will provide the setting for nighttime dancing and stage-show entertainment. Each of its 600 rooms, including 50 elegant suites in royal Thai decor, will look out on the lagoon or a central recreation area.



An enclosed small boat harbor and an intricate system of waterways will create the charm and atmosphere of the Italian city in the 500-room Venetian theme hotel. Travel by gondolas and other boats will carry out the theme, and there will be bridges crossing the water at various points. The style is reminiscent of St. Mark's Square, complete with a 120-foot campanile which will toll the time. The entire lobby will be glass-topped, creating a sunny atrium effect indoors.

Like an exotic far eastern palace, the Persian-style hotel will rise on the northwest shore of the lake. A huge dome will crown the central lobby, from which balconies will radiate to the 500 rooms. Dining facilities and swimming pools will be located on terraced decks adjoining colorfully landscaped courtyards.



The hotels for Walt Disney World mark the second time WED Enterprises and Welton Becket & Associates have worked together. The friendship of company founders Walt Disney and Welton Becket brought them together in the design of buildings that housed Disney shows at the 1964-65 New York World's Fair.

The designs of Welton Becket & Associates have won the firm international respect and awards. The Becket organization drew the master plan for Century City in Los Angeles, and its design credits include the Gulf Life Insurance building in Jacksonville, the Xerox Building in New York City, and the Los Angeles Music Center. Its hotel concepts include the Nile Hilton, the Manila Hilton, the Intercontinental Hotel in Auckland, New Zealand, and the Southern Cross in Melbourne, Australia.

## LAND IMPROVEMENT:

### REEDY CREEK IMPROVEMENT DISTRICT DEVELOPING BASIC PUBLIC SERVICES

A vast and imaginative land improvement program – including water control and utility planning – has been under development for the past two years at Walt Disney World by the Reedy Creek Improvement District.

The District is a public body of the State of Florida, created by the legislature and governed by a Board of Supervisors, to plan and provide basic public services necessary for the tourist and residential population expected at Walt Disney World.

The water control plan, approved in full by Florida courts, will ultimately include 55 miles of winding canals and 22 automatic float gates. To date, nearly 38 miles of these channels are completed, designed to maintain the level and flow of water even under extreme rainfall conditions.

Besides water control, the multi-purpose district is moving rapidly on other vital utility projects such as the design and construction of a Central Energy Plant, water supply and purification facilities, fire security, and a waste disposal plant.

The District Fire Department already numbers 10 men and provides 24-hour on-site protection.

Two power plants, each with a 5,500-kilowatt capacity, have been purchased for the Central Energy Plant where waste heat from the engines will provide heating, hot and chilled water, and air conditioning.

The District recently signed a cooperative agreement with the United States Geological Survey to study and evaluate how rapid urban development affects the quantity and quality of water resources in a previously undeveloped area.

The Improvement District is also developing zoning regulations and building codes for Walt Disney World.

These codes and regulations will provide the flexibility to encourage the evolution and use of new innovations and technologies in planning and construction. Ultimately, the codes and regulations under which the Reedy Creek Improvement District was chartered will make it possible for EPCOT – Walt Disney's long-term dream for an Experimental Prototype Community of Tomorrow – to become a reality.

The Reedy Creek Improvement District is directed by a Board of Supervisors whose President is General William E. Potter. General Potter, a West Point graduate, was formerly Governor of the Panama Canal Zone and Executive Vice-president of the New York World's Fair. He is based in Orlando, where he directs the District's on-site activities.

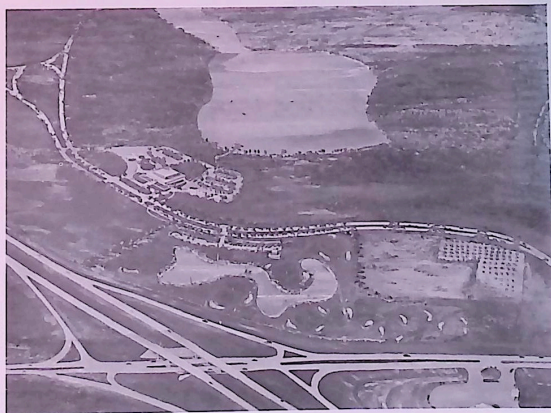
## MOTOR INN PLAZA & PREVIEW CENTER

Even before the opening of vacation-recreation facilities at Walt Disney World, another significant development is underway on land owned by Walt Disney World Co.

To meet and encourage the intense public interest in "what Disney is doing" in Florida, Walt Disney Productions is developing a Motor Inn Plaza & Preview Center at the highway intersection of Interstate 4 and State Road 535.

Opening of initial facilities is scheduled for December 1969.

Because it will be the first physical development by Walt Disney Productions open to the public, it is being planned to incorporate the fun, the flair, and the show-treatment of an important Disney attraction. The Preview Center will include a complete "show" detailing the attractions of Phase One through models, renderings, film, and tour-guide explanation.



*Preview Center will Introduce Visitors to Walt Disney World*

The commercial development of a Motor Inn Plaza and Preview Center is based on study and evaluation of market potentials. As the opening of Walt Disney World approaches, the demand for accommodations, and the need for motor inn services, is growing progressively larger. The market for motor inn services includes:

- The public, both Florida tourists and residents of the state. Additionally, based on the experience of California's Disneyland, the construction of Walt Disney World will become an "attraction" in the months before opening. The Preview Center will serve as a focal point for this pre-opening activity.
- The press, whose interest in Walt Disney World is already extraordinary. Major press relations facilities are planned in the Preview Center.
- Executives of major national companies. Dozens of companies in many fields have expressed interest in participating in Walt Disney World in a variety of ways. A major "lessee relations" and conference facility is planned for the Preview Center.
- Additional VIP's, including government officials and important guests visiting the state of Florida.

26 Acquisition of the property and control of the development at two major highway intersections (Interstate-4 and State Road 535, and Interstate-4 and State Road 530) is one of the most significant features of the Walt Disney World site. The motor inn operators associated with the Preview Center complex at I-4/535 will have prime access to approximately one-half of all visitors to Walt Disney World after its opening in 1971. Independent studies project that 48% of visitors will pass the I-4/535 intersection to reach the Walt Disney World entrance, and 56% will pass the I-4/535 intersection on their exit route.

Commercial sites are now being prepared for several dozen facilities, including motor inns, restaurants, and service businesses. A number of major motor inn names have already agreed to participate.

## THE RESIDENTIAL COMMUNITY

An added significance to the Motor Inn Plaza & Preview Center derives from the fact that this highway commercial center represents the first phase in development of a Residential Community on property owned by Walt Disney World Co.

The Residential Community will, in effect, "branch off" from the commercial development at the intersection of State Road 535 and Interstate Highway 4. The community will grow along the east and northeast portions of Walt Disney World property, and, the Company believes, will form an underlying economic base for the entire area.

The concept in development is a small, balanced community that can be the focus for early expansion in the entire south-of-Orlando region. Ultimately, it will have a carefully conceived network of community and recreation facilities. It will incorporate a variety of housing types and neighborhoods coordinated into a complete "small town" environment.

The Residential Community will have an integrated theme ... a chain of lakes and open spaces that will make recreation and Florida's natural resources of sunshine, fresh air, mild climate, and scenic beauty a part of everyday life.

Phased in response to market projections, the Residential Community will embody many of prototypes which may later be considered for incorporation into the Experimental Prototype Community of Tomorrow - EPCOT.



## THE FUTURE:

### EPCOT - EXPERIMENTAL PROTOTYPE COMMUNITY OF TOMORROW

#### Concept

Of all the concepts envisioned in Walt Disney's master plan for the Florida project, none has kindled the imagination of the public, the press, and American industry more than the concept for an Experimental Prototype Community of Tomorrow.

Walt Disney called it "EPCOT ... the heart of everything we'll be doing in Disney World."

"EPCOT," Walt Disney said, "will be an experimental prototype community of tomorrow that will take its cue from the new ideas and new technologies that are now emerging from the creative centers of American industry."

"It will be a community of tomorrow that will never be completed, but will always be introducing and testing and demonstrating new materials and systems. And EPCOT will always be a *showcase to the world* for the ingenuity and imagination of American free enterprise."

The concept for EPCOT envisions a community of approximately 20,000 residents. Their homes will be built in ways that permit ease of change so that new products may continuously be demonstrated. Their schools will welcome new ideas so that everyone who grows up in EPCOT will have skills in pace with today's world.

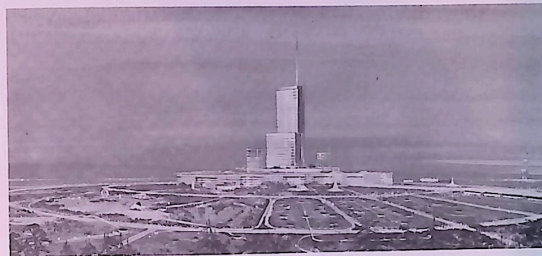
From the beginning, Walt Disney saw the need for the cooperation of American industry in the development of EPCOT.

"We don't presume to know all the answers," he said, "In fact, we're counting on the cooperation of American industry to provide *their best thinking* during the planning and creation of our Experimental Prototype Community of Tomorrow. And most important of all, when EPCOT has become a reality and we find the need for technologies that don't even exist today, it's our hope that EPCOT will stimulate American industry to develop new solutions that will meet the *needs of people* expressed right here in this experimental community."

#### Progress

The plan for EPCOT was first announced in February, 1967. Since that time, it has stimulated the thinking not only of industry, but of the national press, urban planners, and especially the state of Florida.

In order to provide a solid legal foundation which could lead to the construction of Walt Disney's great dream, the Experimental Prototype Community of Tomorrow, Walt Disney Productions sought and obtained the passage of enabling legislation by the Florida Legislature.



EPCOT --- Showcase of American Free Enterprise

This legislation created two municipalities, as well as the Reedy Creek Improvement District, to administer certain aspects of the development. The Improvement District is authorized to perform the work of drainage; flood and pest control; to build and maintain roadways, and utility and sewer systems; to provide and administer public transportation systems, fire protection, and airport and parking facilities; and to regulate and administer land use and planning within the District's limits.

For the past two years, the Reedy Creek Improvement District has been designing and implementing a court-approved water control program, which eventually will make developable 18,000 acres within its limits.

#### Status

The enormous complexities of building an entire city - especially one conceived as a "blueprint of the future" and a perpetual showcase for American free enterprise - will require the cooperation of major American industry and considerable research and development before EPCOT is undertaken as part of the "second phase" of Walt Disney World.

However, many of America's major companies have expressed enthusiasm for the concept and for Walt Disney's "EPCOT philosophy". A number of corporations have assigned "task forces" to work with WED Enterprises in the determination and development of systems and materials that can be applied not only in EPCOT, but in the vacation, recreation, and entertainment areas of Walt Disney World.

Specific agreements have been reached and were announced in April of this year, involving United States Steel, Aerojet-General Corporation, the Monsanto Company, and, of course, with RCA.

As Donn B. Tatum, President of Walt Disney Productions, said in announcing these participating companies:

"The Vacation Kingdom which will open in October 1971 represents a major step towards the realization of Walt Disney's master plan, a plan that has always revolved around his great concept of EPCOT. The research carried out and the experience gained -- and the new systems, the new devices, the new techniques which have been found feasible during the past three and a half years of investigation as well as those that yet will be found -- will provide a body of knowledge and experience as we move into the project that is defined today, which will certainly lead to the development of EPCOT.

"The great companies who have joined with us today are looking toward that dream as well."

*"A project like this is so vast that no one company alone can make it a reality. But if we can bring together the technical know-how of American industry and the creative imagination of the Disney organization, I'm confident we can create right here a showcase to the world of the American free enterprise system."*

WALT DISNEY

## THE FUTURE:

### SOME ADDITIONAL CONCEPTS FOR WALT DISNEY WORLD

Although a master plan has been developed as the basic guideline for development of Walt Disney World, the size of the property -- 27,400 acres -- makes possible the addition of new concepts over the years. Some of these ideas, including the following, have already been proposed in Walt Disney's master plan:

*An Industrial Park covering about 1,000 acres.* Not only will the industrial complex provide employment for many people who live in Walt Disney World, it will be a showcase for industry at work. The Disney staff will work with individual companies to create attractive, park-like settings, where visitors can look behind the scenes at experimental laboratories and computer centers for major corporations.

*A Jet Airport of the Future* offering service to private and executive planes, commercial charters, and freight carriers. New methods of baggage and cargo expediting, passenger loading, and transport maintenance will establish this as a prototype for future air terminals. The importance of this facility is indicated by the fact that more than 300,000 people annually arrive in Florida aboard private aircraft.

*An Entrance Complex* with parking for day-visitor automobiles and a computerized registration center. It will utilize the most sophisticated means of processing the millions of guests expected at Walt Disney World. Surrounding this center will be a wide range of accommodations, including motels, trailer parks, and camp sites.

Unlike California's Disneyland, sufficient land exists for creative thought and growth -- and especially for refinement as experience dictates -- for many years into the future.

Remarks by Edwin H. Gott  
Chairman of the Board, United States Steel Company  
at the:  
Walt Disney World Press Conference  
Orlando, Florida - April 30, 1969

On behalf of the people of United States Steel I want to say that we're very pleased that our company is going to be a part of this exciting venture which will bear the name of Walt Disney. I've been asked to briefly review what United States Steel will play -- what part it will play in this phase one of the Walt Disney World. And actually our part is a bold new experiment.

Not too many years ago when our nation began its conquest of outer space, U.S. Steel's American Bridge division came to Florida to construct the space vehicle assembly complex over at Cape Kennedy. Today we're back in Florida to participate in another exciting challenge and one that's designed to help conquer, you might say, "inner space".

The Walt Disney World-United States Steel, through our U.S.S. Realty Development Division, will construct the first two theme resort hotels that will be built here. One of these will be designed in a contemporary motif and the other will be Polynesian style. When these hotels are completed they will be leased by U.S. Steel to Walt Disney Hotel Company which will operate them. There will be seven hundred and fifty rooms in the Contemporary Theme Hotel and about seven hundred in the Polynesian style hotel which includes the motel annex accommodations. And they're both scheduled for occupancy in the fourth quarter of 1971.

Now the reason why we look on these structures as a bold new experiment is this. The fourteen hundred and fifty rooms will be built by unitized or modular construction. Each room will be assembled at the ground level in a facility that will be built on this site for that purpose. This means that before each room leaves the ground it will be completely furnished and the basic utilities and the air climate control equipment will have been installed. Then after the door is closed the self-contained room will be hoisted into place and the utilities will be plugged in. I understand that the Disney people have said that perhaps the first person to enter these rooms after they're in place will be the maid.

Of course, modular construction technique is not new. But there is an important difference between what's been tried before and what we'll be using here. With the cooperation of the fine architectural firm of Welton Becket and Associates we will employ the world's first major use of a steel unitized construction system. And just as we know our friends from RCA consider their role in communications to be quite different from the years in the past, we look upon steel as a different material today. A versatile material ... capable of exciting and total design concepts. By the use of steel framing, each unit in these two theme hotels will weigh approximately only six tons. And that's considerably less than the thirty-ton hotel rooms that have been built by modular construction using other materials.

There's another important reason, as has been pointed out, why I call this a bold new experiment. It's our belief that the use of steel in lightweight unitized construction will prove to be very adaptable for other hotels. And most important, for city housing to help meet the surging needs of this great population explosion in America. We hope that this kind of innovation will be what Walt Disney wanted to generate when he challenged American industry with this dream of Walt Disney World. And since we were all exposed a few moments ago to this exciting idea of EPCOT I can assure you that U.S. Steel is certainly looking forward to the opportunity to participate in any way that we might in the planning and construction of this experimental prototype community of tomorrow.

You know civilization is shaped by doers. And the builders and the creators who find ways to use materials and the forces of nature for the benefit of all mankind. Walt Disney World is already attracting the doers and the builders and the creators. And U.S. Steel is very proud to be a part of this challenging program."

Remarks by Edward J. Bock  
President and Chief Executive Officer, Monsanto Company  
at the:  
Walt Disney World Press Conference  
Orlando, Florida - April 30, 1969

"For more than fifteen years we at Monsanto have been knowing the Disney people and working with them and the whole organization and had known Walt Disney, of course, quite well. We started with them with the project in California. We've had several exhibits there, including the House of Tomorrow, the Hall of Chemistry and the Trip Into Inner Space.

Now as some of you may know, we've entered into a contract with Disney now for further development here at Walt Disney World. Many of us in the company have noticed during this period of business friendship how the Disney people have always been alert to recognize the constant emergence of exciting ideas and products from American industry. Our friends in the Disney organization have also known that when such ideas and products are introduced in the right environment, new elements of a better life for millions of people are the inevitable result.

You can understand, therefore, why a science based company like Monsanto reacted with enthusiasm when we learned of the opportunity to expand our relationship here at Disney World. In the years ahead we shall be challenging each other, I hope, as we both meet new conquests for systems, for structures, for new products and services at the Walt Disney World. To us this is a stimulating relationship. Just as the highly creative Disney organization is readying itself for the world of tomorrow, so are we at Monsanto. We look forward to the Walt Disney World becoming an adventurous new research and development laboratory for our company."

Remarks by Robert W. Sarnoff  
President, RCA Corporation

"Systems engineering, which combines many skills and disciplines in a unified problem-solving effort, has been applied to a great many technical challenges. It has contributed in a major way to the development of color TV, the exploration of space, and the planning and construction of large scale defense installations.

Today the systems approach is being turned to a new task — to meet increasingly urgent social and economic challenges, including problems of health, urban planning, natural resources and education. A new corporate unit, RCA Systems Development, was established to explore these needs and to focus the diverse capabilities of RCA in fulfilling them.

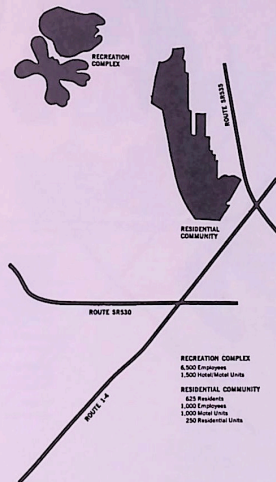
One of the first assignments of this new organization was to help develop the Integrated Information-Communication System for Walt Disney World. We of RCA are proud to be associated with Walt Disney Productions in a project that holds so much promise for the future of human society."

## THE MASTER PLAN

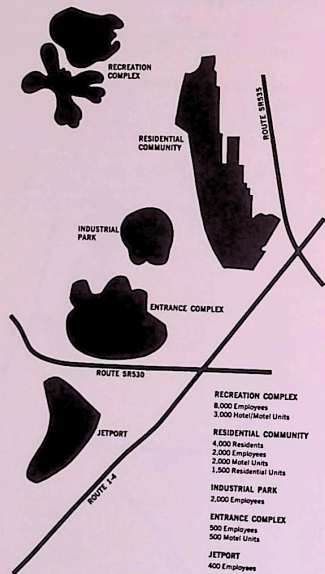
The total development of Walt Disney World will be phased over a 20-year period. The schedules for the various stages of development are graphically presented on the following pages.

The initial phase, comprising the resort complex and the associated recreation area, will serve as the economic base from which the other elements of Walt Disney World will grow.

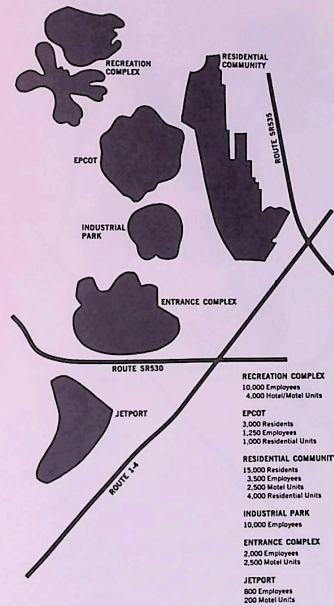
Pertinent statistics for the four stages of development are shown to indicate their proposed growth over the 20-year period.



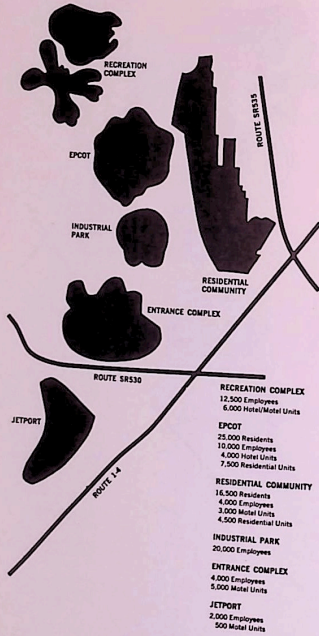
25,000 Visitors — Annual Daily Average  
Development Plan — Year 1 (1971)



45,000 Visitors - Annual Daily Average  
Development Plan -- Year 5



65,000 Visitors - Annual Daily Average  
Development Plan - Year 10



100,000 Visitors - Annual Daily Average  
Development Plan - Year 20

## SECTION II

### MASTER PLANNING WALT DISNEY WORLD

### SUMMARY OF PLANNING RESEARCH

## INTRODUCTION TO PLANNING REPORTS

With the success and experience of Disneyland as an encouraging factor, Walt Disney Productions began looking for another site on the East Coast of the United States in which to expand its outdoor recreation activities. Initial investigation began as early as 1959, and by 1961 the research was concentrated in the State of Florida, with six possible sites under analysis.

By early 1964 the choice of sites was narrowed to two, and the decision was made to begin land acquisition in the Orlando area. Concurrent with land acquisition, research was begun in many areas, including governmental structure, tax structure, municipal services financing, in-depth market studies, development guidelines, entertainment and recreation potentials, new city planning, and many related fields.

Extensive research into the market potential was carried on by many consultants, the foremost being Economic Research Associates of Los Angeles and Washington, D.C. The findings and recommendations were carefully evaluated by the Research and Planning Personnel within Walt Disney Productions. A bibliography of the more comprehensive studies is listed beginning on page 59.

As is evident, the scope of this material is broad-ranging, and research presently continues daily on other phases of development.

## WHY FLORIDA?

After an extensive research program conducted by Economic Research Associates for a suitable site for an Eastern Recreation Development, Florida was selected for several reasons.

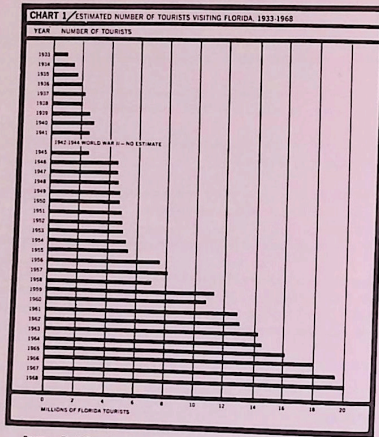
1. A location in the Eastern United States should result in the least possible direct competition for visitors with Disneyland in California.
2. It enjoys a sizable volume of tourism, and an international reputation as a center of resort and recreation activity.
3. Its climate is generally suited to a year-round outdoor recreation facility with minimum necessity of heavy weatherizing.
4. It is on the threshold of rapid population growth and economic development.

The Orlando area was recommended as the location because it is at the junction of the major highways in the state, making it highly accessible to tourists traveling within Florida. Its location in Central Florida makes it convenient to the entire resident population and its large and growing economic base could help sustain Walt Disney World.

### HIGH LEVEL OF TOURISM

The high volume of tourists traveling to Florida yearly make it exceedingly attractive to a recreation-oriented development like Walt Disney World. The Theme Park, Resort Hotels, Golf and Recreation Complex, and even EPCOT will draw their primary support from this large and growing group.

Florida is the number one tourist state in the country with annual tourism volume presently close to three times that of Southern California, the location of Disneyland. Chart 1 outlines a thirty-six year history of visitation to Florida. Present estimates foresee 27 million tourists visiting the state in 1971, the year Walt Disney World will open.



Of the 20 million visitors to Florida during 1968, some 15 million, or three out of four tourists, came within a two-hour drive of the Walt Disney World site without the inducement of a major attraction in the Orlando area. Exposure to a potential audience this large, and the emphasis placed upon recreation and outdoor entertainment in Florida vacationing are extremely favorable indications of the potential for a successful complex of commercial recreation attractions at Walt Disney World.

#### FAVORABLE CLIMATE

The subject property shares the climate of Orlando and Central Florida, which generally can be characterized as registering slightly greater temperature extremes and slightly less rainfall than most coastal areas.

In summer, maximum temperature in the low 90's is usual; a temperature of 100 degrees or more is a rarity. Maximum temperature in winter is in the low 70's. Frosts do occur, but infrequently. The degree of warmth in winter is almost entirely a function of distance south, accounting for the popularity of southernmost resorts with tourists. In summer, however, temperature is a matter of distance inland, with temperatures several degrees cooler prevailing on the coasts.

Relative humidity in Orlando is quite high, a characteristic of semi-tropical climates like Florida's. On summer afternoons at 1:00 p.m., close to the hour when maximum temperature is reached, relative humidity is about 50 per cent, its lowest point during the day. Relative humidity remains quite high throughout the year, tending to make winter evenings seem damp and chilly and summer days hot and humid to those accustomed to drier climate. Areas in which the vast majority of Florida tourists live year-round, however, experience either greater extremes of temperature or equally humid conditions, so Florida's climate is quite desirable in comparison.

Accompanying Florida's heat and humidity is, by Southern California standards, a considerable amount of rainfall. Nearly half of Orlando's annual precipitation falls during June, July, and August. These rains usually come as afternoon thundershowers often preceded by cloudless mornings; while heavy at times, they are usually of short duration.

The varying climatic conditions of Florida have been thoroughly considered in facility design. The design concepts have been structured to provide maximum guest comfort and protection from undesirable climatic conditions.

**TABLE 1 / TEMPERATURE, HUMIDITY AND RAINFALL at Orlando, Florida (30-year average)**

MONTH	NORMAL TEMPERATURE (°F)		RELATIVE HUMIDITY (%)		NORMAL AVERAGE RAINFALL (inches)
	Daily Maximum	Daily Minimum	Daily Maximum	Daily Minimum	
	January	70.7	50.0	89	
February	72.0	51.7	90	55	2.42
March	76.7	55.0	88	49	3.41
April	81.5	60.8	83	42	3.42
May	87.9	67.2	87	45	3.57
June	91.1	71.4	89	54	6.96
July	92.0	73.0	91	53	8.00
August	92.0	73.5	93	57	6.94
September	88.6	71.4	93	59	7.23
October	82.6	65.3	87	50	3.96
November	75.6	56.2	88	55	1.57
December	70.6	51.2	84	55	1.89
Total					51.37

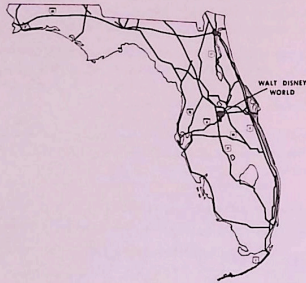
SOURCE: U.S. WEATHER BUREAU



## AVAILABLE HIGHWAYS

Chart 2 shows the location of Walt Disney World in relation to the major highways within the state. As indicated, Interstate 4 cuts across Walt Disney World and provides direct access onto the property. This provides the distinct advantage of direct superhighway connections to all parts of the state, an important factor since close to 80% of the tourists to Florida travel by auto. The majority of these tourists drive into or through Central Florida and hence will come within a short and easy drive of Walt Disney World.

CHART 2/KEY HIGHWAYS WITHIN THE STATE OF FLORIDA



## HIGHWAY IMPROVEMENTS

Walt Disney World will become one of the largest traffic generators in Florida. The majority, some 90%, of the traffic entering and leaving Walt Disney World will use I-4 and SR530. The interchange at this location is presently undergoing expansion in order to handle the anticipated traffic volumes. An entrance interchange to Walt Disney World is presently under construction on SR530. Up to 17,000 cars per day are expected to use this entrance in Year One.

Interstate-4, which now handles approximately 10,000 cars daily, will be required to carry three times this amount in 1971.

By Year 10 up to 80,000 cars per day will use I-4 in the vicinity of Walt Disney World. Peak hour traffic volumes on this road are estimated to exceed today's total daily traffic by the fifth year of operation.

New urban areas will be developed around the Walt Disney World site. This development will require new arterial roads to service these areas. Presently work is continuing to master plan the future road improvements and new requirements. Employees living off the site, together with their families will constitute an external population related to Walt Disney World of approximately 21,000 in Year 1, 41,000 in Year 5, 69,000 in Year 10 and 110,000 in Year 20. Many additional people will be supported by providing services to this external population. The service employees and their families could add 30% to the population. Therefore, by Year 20, Walt Disney World could be supporting directly and indirectly, an external population of nearly 150,000, which is greater than the present population of Orlando.

## DISNEYLAND EXPERIENCE

The fantastic success Disneyland enjoys is unparalleled in the history of the recreation industry. Since it opened in July 1955, over 80 million visitors have passed through its gates, the equivalent of more than one-third the population of the United States. Visitor expenditure at Disneyland exceeds seven dollars per capita, a record for amusement enterprises. An attendance of 9.4 million visitors during the fiscal year 1968 also set a new record for Disneyland as well as other Parks.

Disneyland's phenomenal success is the result of unprecedented levels of planning and investment for such a project. Its design is the product of the combined efforts of a staff with vast experience in successfully producing family entertainment. Its economic planning has been equally detailed. Six months of study, by independent analysis and Disney staff, of potential locations went into the selection of Disneyland's site. After careful consideration of a great many factors, including population and income trends, traffic patterns, climate, and topography, the Anaheim site was chosen from several alternatives.

The original capital investment of \$17 million covering twenty-two attractions has increased to over \$110 million. There are now 53 attractions to entertain the guests.

The impact of spending due to capital programs, operating and maintenance labor and materials, etc., has had a significant economic effect on the surrounding area. In addition, the success of Disneyland has provided the impetus for a new convention center, an American League baseball park, close to 7000 hotel/motel rooms within walking distance, and countless other recreation-oriented facilities. Equally important is the national and world-wide attention focused upon the area.

## ATTENDANCE HISTORY

It is evident that Disneyland as a large, high-quality, permanent attraction has become an important factor in drawing tourists to California. A recent U.S. Department of Commerce study indicated that Disneyland has a higher rate of visitation by out-of-state visitors than any other individual area or attraction in California. Approximately 40% of tourists to California visit Disneyland.

As more leisure time is made available and the public becomes more travel and recreation oriented, Disneyland reflects this growth. The success of Disneyland can be measured by Table 2.

TABLE 2 / DISNEYLAND ATTENDANCE

FISCAL YEAR *	GUESTS (Millions)
1955	1.2 (3 months)
1956	3.8
1957	4.3
1958	4.3
1959	5.0
1960	4.9
1961	4.7
1962	5.0
1963	5.6
1964	5.9
1965	6.3
1966	6.7
1967	7.9
1968	9.4

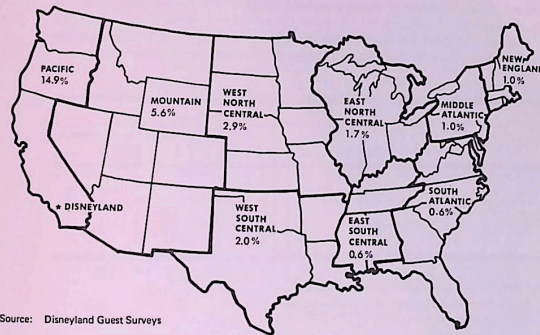
\*September 30

Source: Walt Disney Productions

Disneyland's fame throughout the Eastern half of the United States, where its market penetration rate is relatively low because of the great travel distances involved, will very likely generate increased tourism to Walt Disney World. Only in the North East Central Region has Disneyland's annual market penetration exceeded 1 percent (see Chart 3). The State of Florida's present penetration is highest in the Eastern areas, ranging from 6.5 percent to 12.7 percent. Since few of these people have visited Disneyland, it is reasonable to expect that more repeat visits as well as an increased number of first-time visits, to Florida will take place as a result of Walt Disney World. Also, since it is estimated that only 5 to 10 percent of Florida's tourists have ever attended Disneyland, previous exposure to this type of attraction will not restrict attendance at Walt Disney World.

One of the reasons for the success of Disneyland is its appeal to persons of all age groups. In fact, three out of four visitors to Disneyland are adults, dispelling the thought that "Disneyland is only for children".

CHART 3 / DISNEYLAND'S ANNUAL PATTERN OF REGIONAL MARKET PENETRATION



Source: Disneyland Guest Surveys

ECONOMIC EFFECT AND EMPLOYMENT

Since the opening of Disneyland some fourteen years ago, some \$1.5 billion has accrued to the City of Anaheim's economy through guest sales and expenditures, construction costs, support facilities, etc. Visitors to Disneyland have spent close to \$500 million within the entertainment center during this period and another \$1.0 billion in the surrounding community for lodging, food, amusements, souvenirs, etc.

The economy of Orange County, California annually benefits by some \$400 million from visitor expenditures for services associated with tourism. This is a multiplier of some six times Disneyland's gross sales.

In addition, Disneyland purchases some \$20 million in goods and services locally each year. The 3,000 permanent employees swell to some 6,000 during peak seasonal periods, creating an annual payroll in excess of \$20 million.

Lodging facilities available to Disneyland visitors have also increased markedly; from 100 rooms in the City of Anaheim in 1955 there are now close to 7,000 rooms available in the immediate area.

Disneyland has also contributed to the growth of the community in terms of population. From 30,000 residents in 1955, Anaheim is now a city of over 160,000 people, and was for many years the fastest growing area in the country.

## TOURISM IN FLORIDA

### WHY VISIT FLORIDA

The prime reason to visit Florida is, of course, enjoyment and recreation. As illustrated in Table 3, the majority of tourists come to Florida for a vacation. The second most common reason is to visit friends and relatives. The balance of tourists come primarily for business and convention purposes and in many cases the businessman is accompanied by his family whose interest is recreation.

TABLE 3/PURPOSE OF TRIP

Item	Percent of									
	Total	Visitor		Season		Mode of Transportation				
		First	Repeat	Winter	Summer	Auto	Plane	Train	Bus	
For Vacation	70	76	67	73	75	77	49	38	27	
To Visit Friends or Relatives	30	28	31	32	29	27	37	56	68	
For Business and Pleasure	9	6	10	9	7	7	17	3	8	
To Purchase or Look for Florida Property	5	4	5	4	4	5	4	3	1	
To Attend Convention	3	3	3	3	2	2	9	9	2	
Other	5	3	5	3	4	5	3	5	5	
TOTAL	122	120	121	124	121	123	119	114	111	

Note: Multiple responses were permitted on the above question.

Source: Florida Tourist Study - 1968  
Florida Development Commission

Florida's climate and all-around attractiveness play an important part in bringing tourists to the State. The major decision motivating tourists in coming to Florida has been their experience of a previous visit to the State; recommendations of friends and relatives is the next largest motivator for visitors.

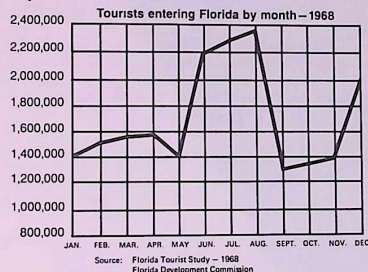
### VOLUME AND DISTRIBUTION

As previously mentioned, over 20 million tourists entered Florida during 1968. In addition, approximately 6 million other visitors came to Florida during the year, primarily on one-day business trips.

Contrary to popular belief that Florida is primarily a winter vacation mecca, Chart 4 shows that the largest volume of tourists visit Florida during the summer. Thirty-three percent of the annual attendance comes during June, July, and August. This, of course, coincides with the normal vacation patterns of the population. The excellent winter visitation coupled with the summer leaves only a few months during the year when visitation can be considered minimal. In addition, the recent increase in free time available for vacations, recreation, etc., has had a pronounced effect on tourism in all areas. The sub-tropical resorts particularly, normally noted as winter retreats, are now experiencing year 'round business. This is a direct result of increased leisure time; lower cost air transportation, tour, and charter plans; and increased promotion by resort operators.

This year 'round attendance pattern offers an excellent advantage to a resort operation of the nature of Walt Disney World.

CHART 4/TOURISTS ENTERING FLORIDA BY MONTH - 1968

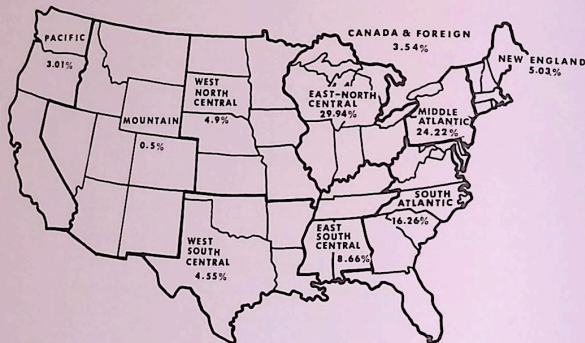


### ORIGIN AND TRAVEL PATTERNS

The largest number of tourists to Florida come from two areas; the heavily populated belt reaching from St. Louis to Boston and the Southern States bordering on Florida. Over 50% of the annual visitation originates in nine highly urbanized and industrialized states of the Northeast. These include New York, Ohio, Michigan, New Jersey, Pennsylvania, Illinois, Indiana, Massachusetts, and Connecticut, in that order. Market penetration is shown in Chart 5.

The majority of these visitors, some 78%, arrive by automobile. Another 19% enter via commercial airlines, a majority of which will switch to rental autos for their intra-state travels. This heavy usage of motor vehicles accents Walt Disney World's strategic location at the crossroads of Florida's excellent highway system.

**CHART 5 / ORIGIN OF OUT-OF-STATE TOURISTS IN FLORIDA BY GEOGRAPHIC REGION, 1968**



Source: Florida Tourist Study - 1968  
Florida Development Commission

**TABLE 4 / ESTIMATED NUMBER OF TOURISTS ENTERING FLORIDA BY MONTH, BY TRANSPORTATION 1968**

Month	Auto	Plane	Train	Bus	Total
January	1,030,577	323,792	35,532	35,035	1,424,936
February	1,072,312	352,495	23,834	32,079	1,480,720
March	1,157,939	363,938	26,505	33,620	1,582,002
April	1,180,290	354,751	26,343	28,388	1,589,772
May	1,091,381	260,165	20,856	26,451	1,398,853
June	1,766,182	279,144	26,335	31,037	2,102,698
July	1,897,402	308,707	32,258	34,367	2,272,734
August	1,914,383	335,477	33,934	43,617	2,327,411
September	1,013,674	210,046	19,022	23,613	1,266,355
October	996,395	245,198	34,203	23,607	1,299,403
November	1,027,337	290,848	17,194	24,631	1,360,010
December	1,451,643	415,306	26,970	36,656	1,930,575
<b>TOTAL</b>	<b>15,599,515</b>	<b>3,739,867</b>	<b>322,986</b>	<b>373,101</b>	<b>20,035,469</b>
Percentage Distribution	77.8%	18.7%	1.6%	1.9%	100.0%

Source: Florida Tourist Study - 1968  
Florida Development Commission

**GROUP SIZE**

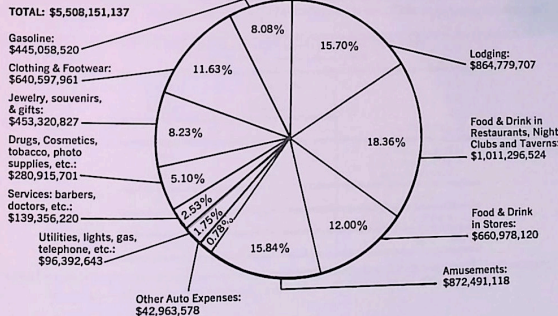
The group size of visitors to Florida varies by season, reflecting the characteristics of the individual tourists. In the summer, the average group size is 3.5 persons, which is indicative of the family groups and greater proportion of children during this period. In winter, when children are in school, the tourist groups tend to be composed of adult couples, many of whom are of retirement or semi-retirement age. Consequently, the group size drops to 2.5 persons during this period.

**LENGTH OF STAY AND EXPENDITURE**

During the summer the average length of stay is about twelve days, compared with nineteen days in the winter. Trips are shorter in the summer because of the predominance of vacationing families who are usually limited to two or three weeks, while the length of stay in winter is increased because winter visitors are often retired or semi-retired couples who are free to spend a longer time.

Expenditures by visitors average \$17.59 per person per day for a total of \$275.00 per stay. Food and lodging accounts for the majority of the expenses, although spending for amusements, souvenirs and gifts is also important, representing 24% of the traveler's budget.

**CHART 6 / DISTRIBUTION OF THE TOURIST DOLLAR IN FLORIDA**



Source: Florida Tourist Study - 1968  
Florida Development Commission

## TOURISM AS RELATED TO WALT DISNEY WORLD

Phase I of Walt Disney World will offer a new kind of vacation experience to Florida visitors. A complete destination resort, it will be built around a "Theme Park" and include all other forms of outdoor recreation and entertainment activities. Tourists, of course, are a vital consideration in a development of this nature, more so than they were in planning Disneyland. Southern California, with a large resident population, provides substantial support for Disneyland. Florida, specifically the Orlando area, with its much smaller population ratio makes it imperative that Walt Disney World successfully attract the large tourist market in Florida.

### VOLUME

Previous pages indicated that the volume of Florida tourism exceeded that of Southern California by almost three times. The tourists visiting Florida in the summer are similar in characteristics to Disneyland guests, particularly in the adult/child ratio. In determining a market penetration for Walt Disney World the rates below were used.

#### ASSUMED MARKET PENETRATION

- 45% of First Time Summer Visitors to Florida
- 30% of Repeat Summer Visitors to Florida
- 30% of First Time Winter Visitors to Florida
- 20% of Repeat Winter Visitors to Florida

Lower penetration rates are assumed for winter visitors because of age and high repeat visitation factors characteristic of this group.

The resident population of Florida is compared with California in Table 5.

TABLE 5/ AVAILABLE RESIDENT AND TOURIST MARKET  
DISNEYLAND VS. WALT DISNEY WORLD

	CALIFORNIA 1966 (Millions)	FLORIDA EST. 1972 (Millions)
<b>RESIDENTS</b>		
Within 40-mile range	9,283	0,825
40 to 120-mile range	2,012	2,392
Over 120-mile range	7,900	3,953
Total	19,195	7,170
<b>TOURISTS</b>		
Total	7.0	27.0

Source: California Department of Finance  
Walt Disney Productions

Applying penetration rates to this market consistent with Disneyland's draw on California residents and adjusting for age and income factors indicates that 12-15% of Walt Disney World attendance will derive from this group.

Applying these penetration rates against the 27 million tourists and 7.1 million residents estimated for Florida during the 1971-72 indicates an expected attendance of slightly under 8.0 million visitors during Walt Disney World's first year of operation.

### SEASONAL TRENDS

While Disneyland experiences a peak attendance during the summer months, June, July, and August accounting for over 52% of the annual visitors, Walt Disney World will enjoy a more stable year 'round attendance pattern. This results from the fact that Florida enjoys a substantial winter tourist business, something California has not been able to match.

The winter visitor, because of his higher expenditure pattern and longer length of stay, generates attendances at amusement attractions throughout Florida, which equal summer volumes. This is accomplished even though the total number of people visiting Florida during July and August is 70% greater than those visiting in February and March. Analysis of attendance trends of Florida attractions and visitor patterns into the State indicates Walt Disney World can expect an annual distribution of visitors as outlined in Table 6.

TABLE 6/ ESTIMATED DISTRIBUTION OF ATTENDANCE WALT DISNEY WORLD

MONTH	PERCENT
January	5.5
February	10.0
March	11.0
April	9.0
May	5.0
June	9.0
July	15.0
August	15.0
September	3.0
October	4.0
November	5.5
December	8.0

Source: Walt Disney Productions

Convention activity, which will be concentrated during May, September through November, and January, will stimulate attendance during the normally "slow" tourist months.

#### ACCOMMODATIONS

Room demand will be generated from three sources; tourism, conventions and group business, and commercial and industrial visitation. Presently, the current demand for rooms in the Orlando area approximates 1,160,000 room nights annually, of which 750,000 are directly related to tourism and the remainder are generated by commercial and local demand.

With the opening of Walt Disney World and other facilities planned for the area, the entire market for rooms in the Orlando area is estimated to total 3,490,000 room nights annually.

An analysis of existing and proposed hotel and motor hotel rooms indicates that approximately 8,500 new rooms will be required in the area to meet this increased demand. Demand for approximately 6,800 of these rooms will be generated by Walt Disney World alone.

The average length of stay for visitors in Walt Disney World accommodations will be 2.5 days during the first year and will increase to 3.0 days by Year 10.

The majority of the accommodations in the Orlando area are below the level that is generally acceptable to the average tourist or visitor to the area. The existing hotels and motor hotels in the Orlando area are not strongly competitive with the proposed resort hotels planned for Walt Disney World. Because of this, Walt Disney World will become a destination point for a large percentage of tourists and visitors to the Orlando area.

## EPCOT

In the formulation of plans for EPCOT, a "comprehensive approach" was considered the optimum method to accomplish the objectives of an Experimental Prototype Community of Tomorrow. This approach combines a number of planning methods for developing a large-scale new community. The four commonly used individual approaches to community planning are as follows.

#### SITE PLANNING APPROACH

One of the more common ways to formulate a plan for a new community, this approach considers the orderly arrangement of land uses and groups or structures on the ground in harmony with one another, as influenced by topography. This approach normally involves studies of site analysis, analysis of surface and subsurface conditions, view and desirability analysis, density and price range analysis, circulation and utility analysis, visual form analysis, cost analysis, final resolution, development analysis, and specific planning.

#### PHYSICAL DESIGN PLANNING APPROACH

This approach attempts to interrelate the parts of a city into a whole and to harmonize natural features of the environment. It is concerned chiefly with the manipulation of space, notably with elements of visual form and the interrelationship of buildings and spaces between buildings, to create a sense of urban form and harmonious relationships.

#### SOCIAL PLANNING APPROACH

The social planning approach endeavors to create an environment in which people will be helped rather than impeded in their efforts to achieve socially meaningful ends. The following methods are used to accomplish this: (1) selecting goals which are identifiable with preferred social drives, (2) translating these goals into practical tasks and missions, (3) infusing social values into the economic and political processes, and (4) programming and coordinating the resources and activities of society to achieve the stated goals.

#### ECONOMIC BASE PLANNING APPROACH

This approach is concerned chiefly with those employment activities which supply significant multiplier effects. Any industry which is involved in exporting goods or services outside the local community is termed a "basic" industry. Such industry will bring wealth into the community, resulting in expansion of jobs, income, consumption, production, population, etc. Since these are effects which can be forecast with a fair amount of accuracy, the economic base approach will use these measurements for planning an environment around a "basic" industry or industries and strive to attract desirable "basic" industry.

## THE COMPREHENSIVE APPROACH TO NEW COMMUNITY PLANNING

This approach to community planning is a comprehensive one which makes use, in an integrated and systematic fashion, of the several avenues prescribed previously.

An outline of this approach would include the following.

**Selection of Staff** - Establishment of a Project Manager and a staff to assist him in the planning and directional phase. Systems analysis should be included to guide the overall study; especially the economic base planning.

**Surveys and Analyses** - A variety of surveys and analyses must be initiated before definitive planning studies can proceed. These studies should include government requirements, growth model development, social planning studies, housing demand model, activity interrelationship - compatibility analysis, transportation studies, regional-spatial studies, historic and aesthetic values survey, basic community facilities and public services analysis, institutional analysis, communications requirements, climate control studies, building materials and construction methods and utility analysis.

**Preliminary Programming** - After all surveys and analyses are complete, programming will begin in order to define and specify preliminary program requirements of a comprehensive type.

**Cash Flow Analysis** - Concurrent with preliminary programming this will test the economic feasibility of the programs being generated.

**Physical Design Planning Studies** - When preliminary programming decisions have been made the related objectives will be assigned to the architect-planners for adaption into three-dimensional representations.

**Site Planning Studies** - Proceeding concurrently or in advance of the visual design effort these studies will influence final resolution of the plan, since they deal with the physical circumstances of the development site.

**Development Programming** - This will consist of investment and marketing strategy and will fix capital requirements and development controls.

**Cost Model Development and Application** - This will provide management with an objective tool to measure costs, performance and profits.

**Project Execution** - After the plan and development program have been reviewed and tested against the objectives the project can proceed.

The previous pages have outlined the approach to planning a new community. Many of the studies and analyses required have already begun, and in some instances preliminary information reported on. The first phase of Walt Disney World will also provide an actual working knowledge of some of the concepts currently being considered on a larger scale in EPCOT.

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