

The Walt Disney World Audience UNLIMITED POTENTIAL



*Scene at Walt Disney World
Magic Kingdom guests walking down Main
Street, U.S.A. (June, 1975)*

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Introduction

With the opening of Walt Disney World in October 1971, a whole new dimension in Disney outdoor entertainment was made readily accessible to the more than 137 million Americans residing east of the Mississippi River. And Walt Disney World has quickly established itself as the number one destination resort in the world, attracting more than 50 million guests in little over 4 years.

Who are these people who have contributed to the astonishing success of Disney theme entertainment? This report reviews the more important socio-economic and demographic characteristics of our Walt Disney World audience, and concludes that collectively they are a most unique and exciting group.

This particular study is designed to provide potential participants with the latest information about the people who visit Walt Disney World. These statistics provide input and insight as to the strength and influence of the Disney product in the marketplace—its ability to reach the thought-leaders and decision-makers, the most dynamic age groups, and those who are the most active consumers.

Based on a mail survey of some 14,000 guest households who visited Walt Disney World during 1975, the results were generated from the more than 60 per cent who responded—a phenomenally high response rate, indicative of the great public interest in Disney and our associated activities.

The Walt Disney World

“Family” The key to the unprecedented success of Disney outdoor entertainment—indeed, the impetus behind our fast-growing worldwide audience—is the Disney appeal to families. A “typical” family visiting Walt Disney World can be characterized as—

Family Size

4 or 5 persons.

Age

Parents in their thirties.

One or two children under 12 years—one in the 12-17 year bracket.

Education

Head-of-household is college-educated—in many cases having done graduate study.

Occupation

Head-of-household is upscale occupationally—typically in a professional or executive/managerial position.

Income

Annual income exceeding \$20,000.

Home Ownership

Own their home, with a current market value exceeding \$40,000.

Walt Disney World Visitation

Spends 3 days visiting Walt Disney World and plans to visit again in the near future.

Highlights Following are selected key characteristics of the Walt Disney World audience:

Appeal to People of All Ages

The composition of Walt Disney World guests is 4 adults to 1 child.

Nearly one-third are in the active 25-44 year age group, and upwards of 40% in the 18-34 year segment.

The broad family market is paramount to Walt Disney World's overwhelming success—a median household size of 4 persons.

An Upscale Audience Occupationally and Educationally

More than one-third of our adult visitors are college graduates—NEARLY TWO AND ONE-HALF TIMES THE NATIONAL PROPORTION.

57% of those employed are involved, occupationally, in professional and managerial positions—NEARLY DOUBLE THE NATIONAL FIGURE.

A High Level of Income

39% have household incomes exceeding \$25,000 annually—MORE THAN FOUR TIMES THE NATIONAL FIGURE (9%).

Median household income \$22,250—MORE THAN DOUBLE THE NATIONAL MEDIAN INCOME.

Nearly 9 out of 10 adults (those 18 years and above) own their home, and two-thirds of these homes are valued at greater than \$40,000—OVER THREE TIMES THE NATIONAL FIGURE.

A Highly Mobile Audience

80% of our guests are from outside the state of Florida.

Of these visitors, nearly 30% travel to Florida via commercial airline. These air travelers exhibit the following significant characteristics:

52% have annual household incomes over \$25,000. Of those employed, two-thirds have professional and managerial positions.

42% of the adults have a college degree or higher. 85% own their own home, and 59% of these homes have a value exceeding \$50,000—79% have a value over \$40,000.

Primary Market Encompasses Two-Thirds of U.S. Population

Major market covers the 26 states east of the Mississippi River (and including Washington, D.C.).

Upwards of 90% of Walt Disney World visitors reside in this area.

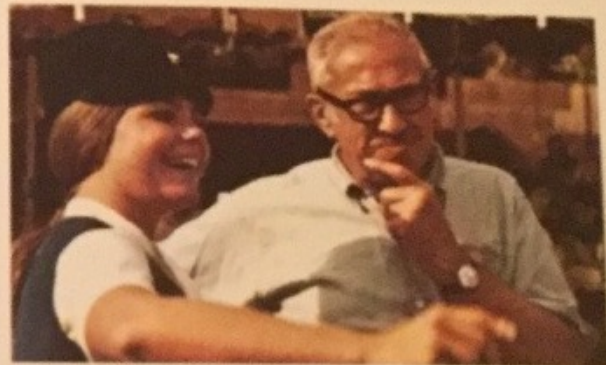
This region is projected to have a population approaching 150 million by 1980.

While encompassing two-thirds of the U.S. population, this area accounts for nearly 80% of the households traveling to Europe, and 75% of the days spent abroad by U.S. travelers.

This region also represents approximately two-thirds of all Americans with valid passports.

Positive Appeal of Walt Disney World Encourages Repeat Visitation

The popularity and variety of Disney theme entertainment encourages return visits—as indicated by more than half of Walt Disney World's guests planning to visit again within 24 months.

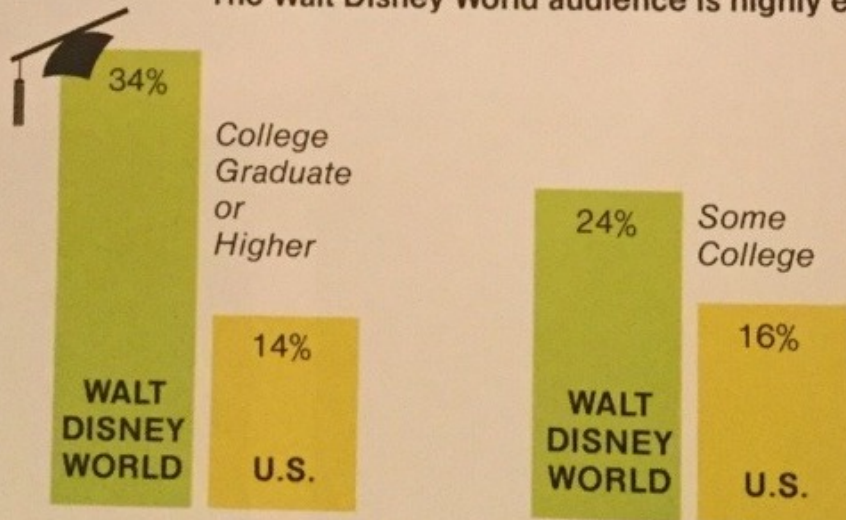


Appeal to people of all ages is a key characteristic of Disney entertainment and recreation...

	Walt Disney World	U.S.
Under 12 years.....	18%...	20%
12-17 years.....	11	12
18-24 years.....	20	13
25-34 years.....	19	14
35-49 years.....	16	16
50-64 years.....	12	15
65 years and above.....	4	10
	<u>100%</u>	<u>100%</u>
Mean Household Size	3.9 persons	2.9 persons

Source: Walt Disney Productions, 1976; Sales Management 1975 Survey of Buying Power

The Walt Disney World audience is highly educated...



Source: Walt Disney Productions, 1976; 1974/75 Simmons Magazine Audience Report

Occupationally, Walt Disney World guests are high on the scale in terms of position and influence...

	<u>Walt Disney World</u>	<u>U.S.</u>
Professional/Technical (doctors, lawyers, etc.)	19%	17%
Managers, Officials, Proprietors	38	14
Craftsman Or Technicians	11	13
Clerical or Sales Workers	15	23
All Others	17	33

- Of the Walt Disney World guests employed in professional/technical occupations – 55% have household incomes exceeding \$25,000.
- Of the managers, officials and proprietors, 44% have household incomes exceeding \$25,000 annually.

Source: Walt Disney Productions, 1976; Audits and Surveys, 1975.



Median annual income of the Walt Disney World audience is more than double the U.S. median—

	Household Income Distribution	
	Walt Disney World	U.S.
Under \$10,000	5%	45%
\$10,000 - \$14,999	16	22
\$15,000 - \$24,999	40	24
\$25,000 and above	39	9
	<u>100%</u>	<u>100%</u>
Median Income	\$22,250	\$11,100

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MEDIAN INCOME

Within any market, it is the households with the higher incomes which do a disproportionately large share of the buying. No matter what the selective consumer product or service, the vast majority of buying—the distribution of sales—follows the distribution of income. Following are several significant examples:

Motor Vehicle Purchases—

On an annual basis, families earning incomes over \$15,000 spend significantly more on motor vehicle purchases than families earning less than \$15,000—

- 2.7 times more on new imported autos.
- 2.5 times more on new domestic autos.
- 1.9 times more on motorcycles.

Home Entertainment Products—

Whether purchasing color televisions or stereo

equipment, buying households are heavily concentrated in the "over \$15,000" annual income category. These households, on an average, purchase significantly more home entertainment products than those earning less than \$15,000—

- 2.0 times as many color televisions and console stereos.
- 2.8 times as many stereo tape decks.
- 2.5 times as many tape recorders.

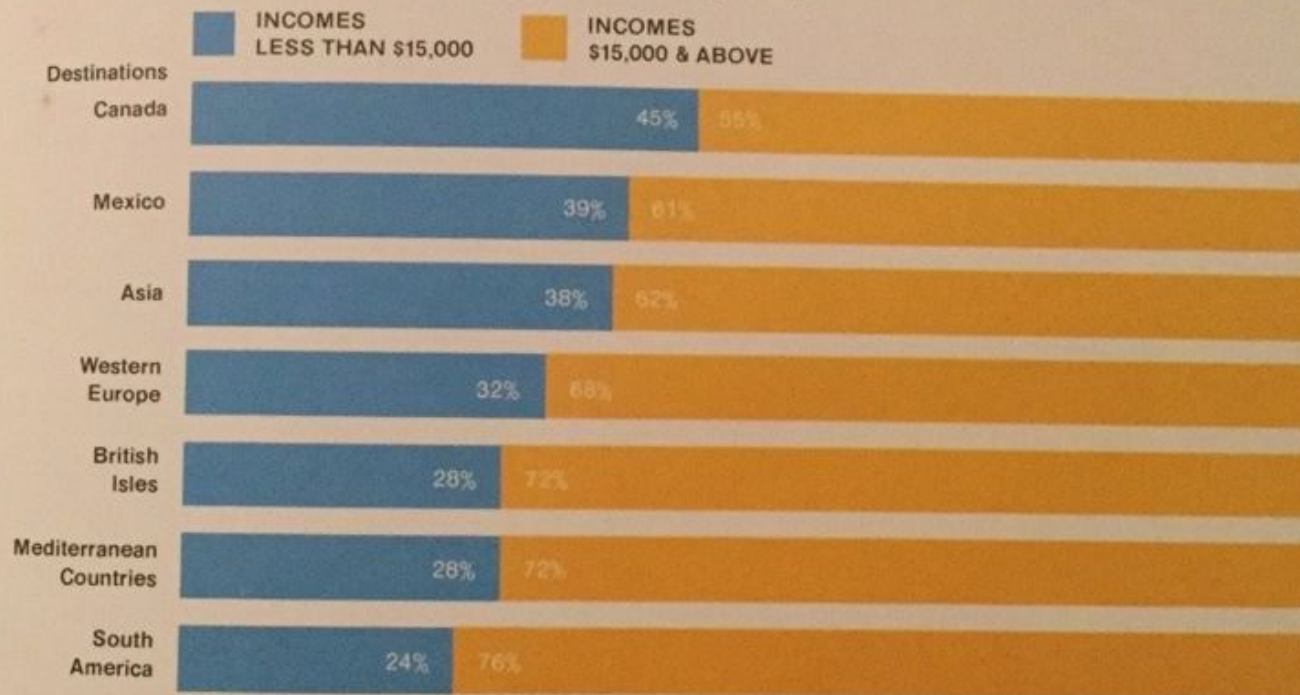
Travel—

While households earning more than \$15,000 annually represent only 33% of all U.S. households, they account for a disproportionately large share of the travel market, as evidenced by the following—

During 1974, households taking vacation pleasure trips of 3 days or more away from home were characterized by the following income levels—

	All U.S. Households	All Vacation Trips	Households Utilizing Commercial Airlines
Households earning over \$15,000	33%	48%	60%
Households earning less than \$15,000	67	52	40

Of all the U.S. households with members who traveled outside the U.S. (48 states and D.C.) within the past 3 years, studies show they were characterized by the following significant household income categories—



It is obvious that the majority of travel, domestic and international, is done by people in higher-income households—those earning above \$15,000 annually. With upwards of 80 per cent of Walt Disney World

guests in this "over \$15,000" income category, it is readily apparent that our guests play a large and active role in the travel market.

HOUSEHOLD INCOME (Continued)

Of the 71 million U.S. households, only 9% had incomes of \$25,000 or more, yet they received more than 25% of the aggregate money income in 1974 --

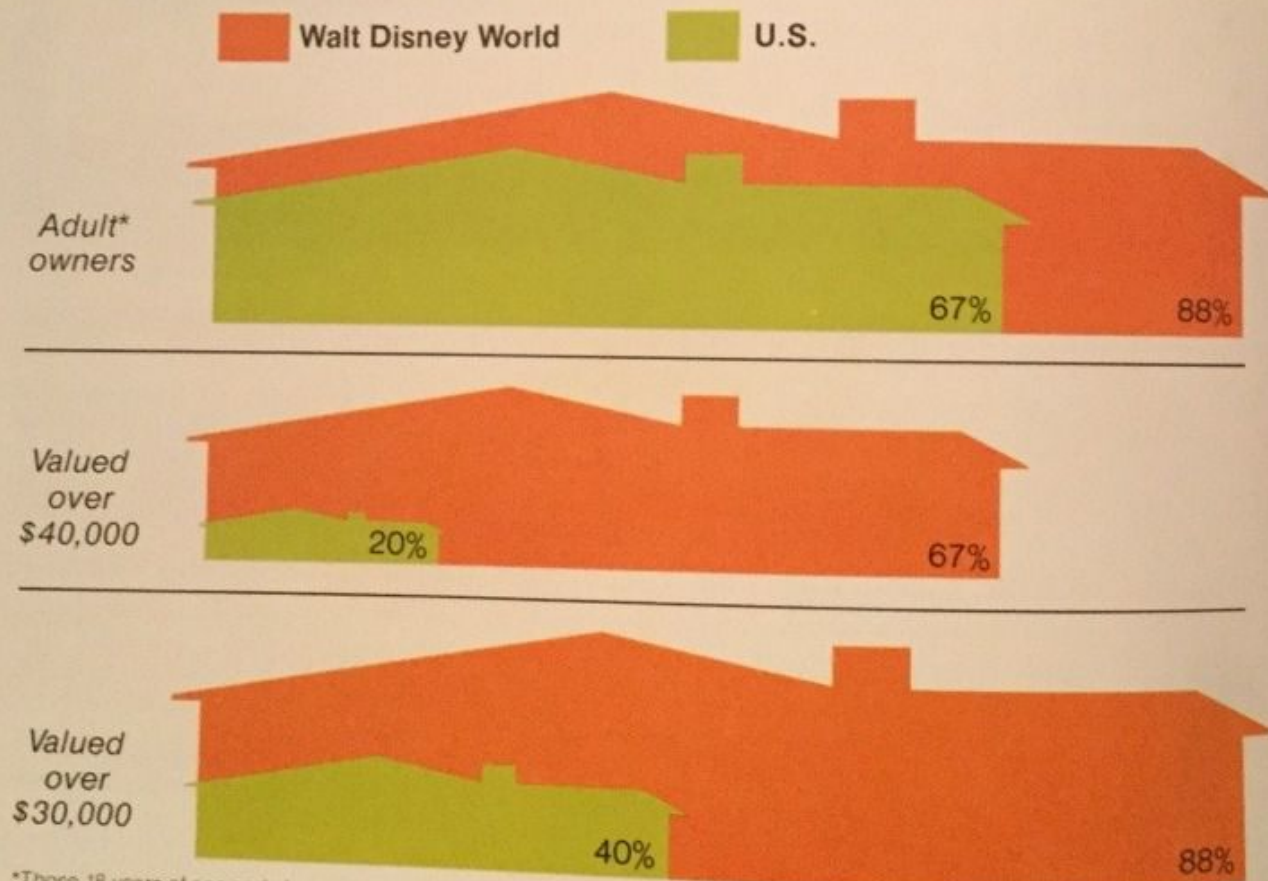
The Walt Disney World audience has more than four times the national composition of households earning annual incomes exceeding \$25,000.

Another 24% of U.S. households had incomes between \$15,000 and \$25,000, and received 35% of the total money income. Here again, the percentage of Walt Disney World households in this category significantly exceeds the national composition.

Source: Walt Disney Productions, 1976; Bureau of the Census, Bureau of Labor Statistics, U.S. Department of Commerce; 1975 Study of American Markets

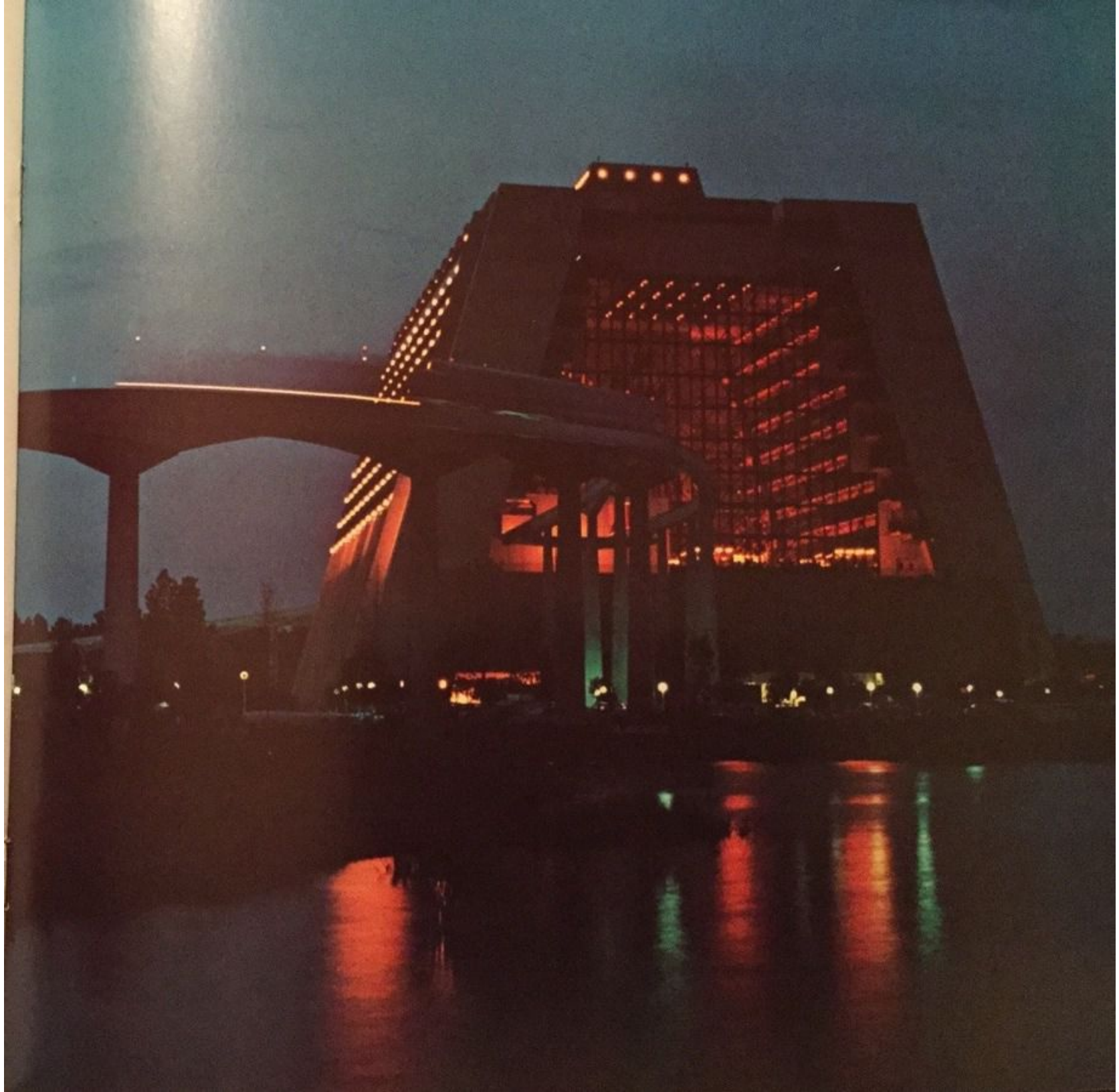
Nearly 9 out of 10 Walt Disney World adult guests own their home...

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*Those 18 years of age and above

Source: Walt Disney Productions, 1976; 1974/75 Simmons Magazine Audience Report



The importance of commercial air travel to Walt Disney World is illustrated by the fact that...

Since the opening of Walt Disney World, annual commercial airline passenger boardings at the Orlando Jetport have nearly tripled (in just four years). Walt Disney World directly accounts for a continually increasing share of this activity—60% in 1975 alone.

A significant percentage of out-of-state Walt Disney World visitors come to Florida via COMMERCIAL AIRLINE—nearly 30%—greater than the comparable percentage for all Florida tourists.

Of this 30% of Disney commercial air travelers—

Income—

- 52% have annual household incomes over \$25,000.
- 83% have annual incomes over \$15,000.
- Median income is more than \$25,000.

Occupation—

- Of the employed adults:
- 22% are professional/technical.
 - 43% are managers, officials, proprietors.

Education—

42% of all adults have a college degree or better, while an additional 23% have had some college education.

Home Ownership—

- 85% own their own home.
- Of these home owners—
 - 79% have a home valued over \$40,000.
 - And 59% a home valued over \$50,000.

Household Size and Age Distribution

Median household size of 4 persons.

Age distribution:

Under 12 years	25%
12-17 years	14
18-24 years	10
25-34 years	16
35-44 years	17
45-54 years	10
55-64 years	5
65 years and above	3
	<u>100%</u>

Permanent Residence

Middle Atlantic	37%
East North Central	25
New England	12
South Atlantic	9
West North Central	5
Other Domestic	7
Canada and other foreign countries	5
	<u>100%</u>

Source: Walt Disney Productions, 1976.

Walt Disney World's popularity and appeal continues to grow, as evidenced by the more than 50% of our guests who plan to visit Walt Disney World again within 24 months...



NOTE: Percentages are cumulative.

Source: Walt Disney Productions, 1976.

Walt Disney World Market

Primary Market

26 states east of the Mississippi River.
Current population of 137 million (two-thirds of total U.S.)

Projected 1980 population of 147 million

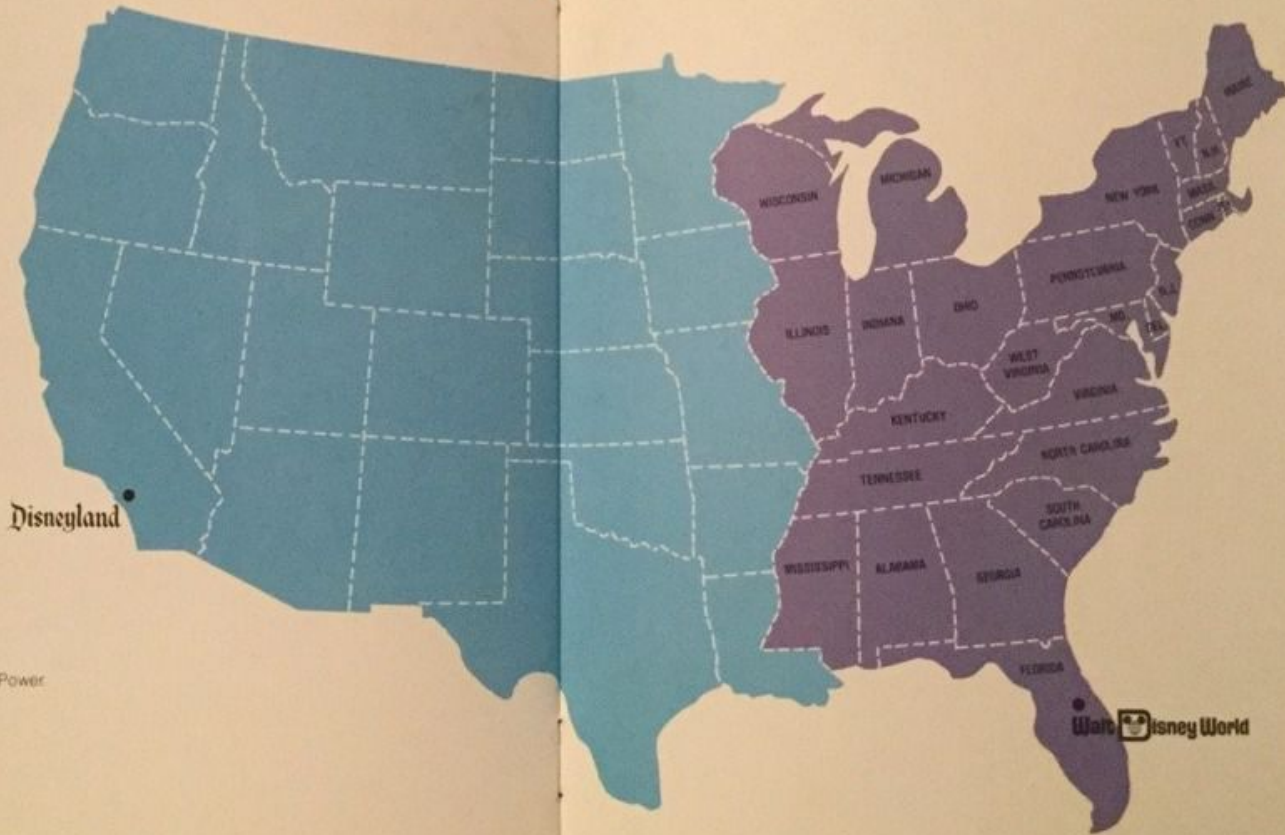
Of the projected increase in U.S. income through 1980, 68% is projected to occur in this region.

Secondary Market

22 states west of the Mississippi River (including Alaska and Hawaii).

All foreign visitors.

Source: Sales Management 1975 Survey of Buying Power.
U.S. Department of Commerce.
Walt Disney Productions, 1976



Top ten cities contributing Walt Disney World guests:

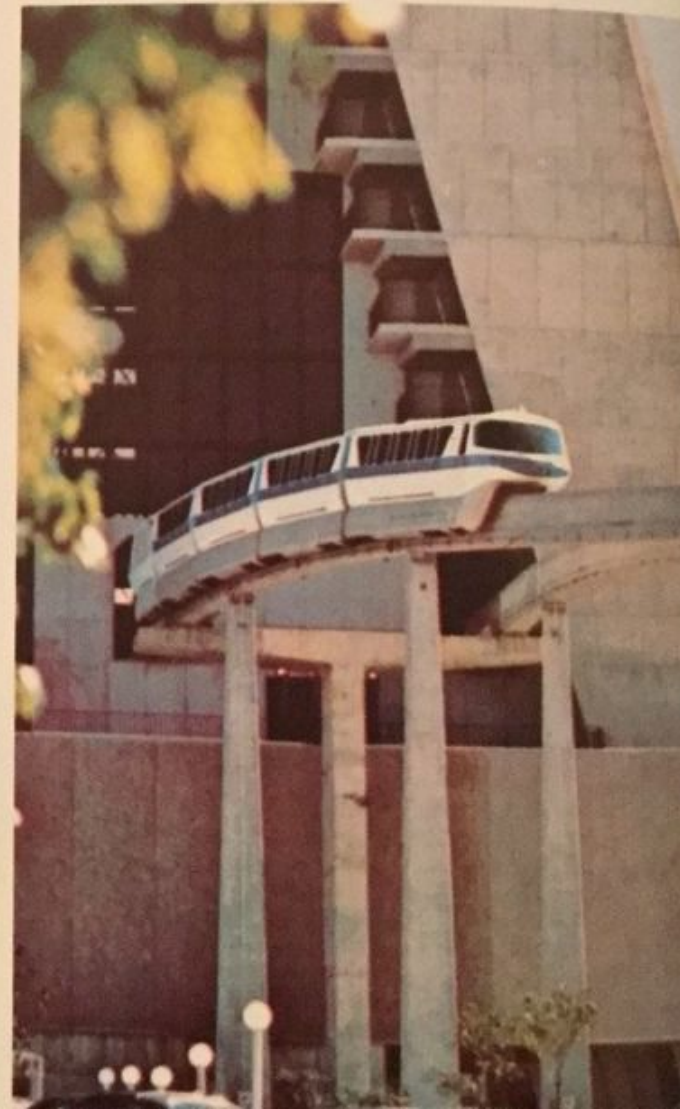
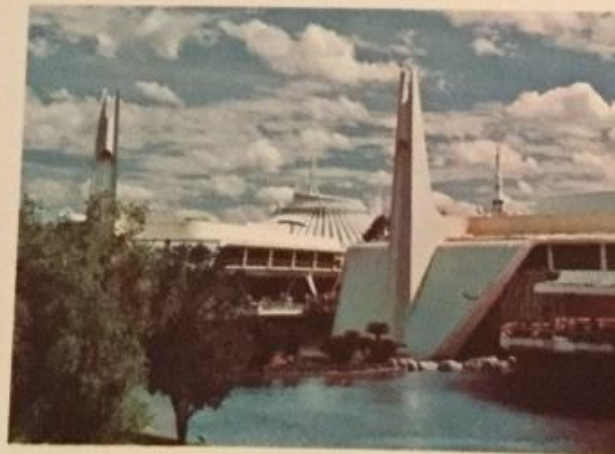
- New York
- Chicago
- Detroit
- Atlanta
- Washington, D.C.
- Cincinnati
- Cleveland
- St. Louis
- Philadelphia
- Indianapolis



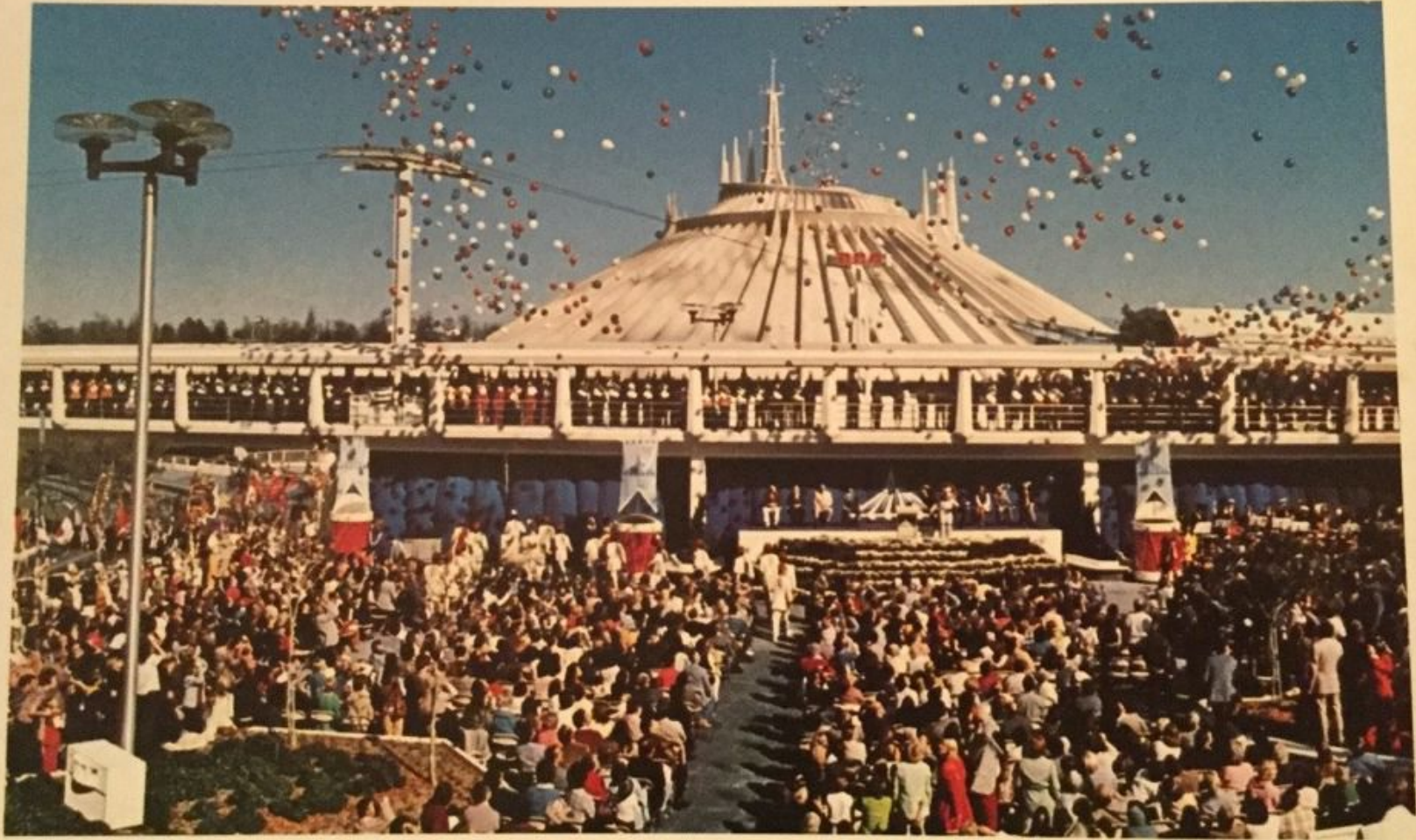
Growing media and communications exposure to the products, services, and ideas of the entire world are advancing the growth of human diversity on an unprecedented scale. And as people become more individualistic, they respond more and more to personal communication.

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We believe our concern for people, our awareness of "the human factor," has created an integrity, image, and atmosphere at Walt Disney World where personal communications is easy and direct. Perhaps this is best illustrated by the unsolicited comments of our guests, who are nearly unanimous in voicing their positive and enthusiastic reactions and opinions regarding their experiences at Walt Disney World.







World Showcase Effort Covers the Globe

Disney team visits Russia, Poland

Two top Disney executives recently visited the U.S.S.R. and Poland as part of the continuing World Showcase communications and research effort.

The team included Dick Nunis, Executive Vice-President of Operations for Disneyland and Walt Disney World, and John Hench, Executive Vice-President at WED Enterprises, the Disney "Imagineers" responsible for creating World Showcase pavilions.



Dick Nunis (l.), and John Hench board the supersonic Concorde jet enroute to Russia and Poland to continue World Showcase effort.

In Russia, the busy schedule included top-level sessions with the Soviet Chamber of Trade and Industry, the Russian counterpart to the U.S. Chamber of Commerce. Included in the talks was Sergey Nikitin, Chairman of the Administration for Foreign Tourism. The meetings were arranged by Soviet Ambassador Anatoliy F. Dobrynin.

Additional sessions were held with Viktor Boichenko, Chairman of INTOURIST, the state tourism organization and a key agency within the U.S.S.R. INTOURIST is the government agency that assists foreign visitors within the U.S.S.R. and Soviet tourists headed abroad.

According to the latest Europa Yearbook, tourism is a developing industry within the Soviet systems. In 1972, for example, more than 2.2 million foreigners visited the Soviet Union — including 66 thousand Americans.

Following the Russian visit, the Nunis and Hench Showcase team traveled to Poland for a continuation of talks with that country.

Meetings with Dr. Wlodzimierz Wisniewski, President of the Polish Chamber of Commerce, and Jerry Zelislawski were part of the visit. A luncheon with other tourism and foreign trade officials was also included.

The trip allowed the team to present the preliminary concept for a Polish pavilion at World Showcase.

The concept is based on a traditional Polish folk-hero, Twardowski, who has been animated to act as host for visitors to the pavilion. Authentic Polish foods, music, and merchandise will be part of the total experience.

Wisniewski and Zelislawski visited Walt Disney World earlier this year for a thorough briefing on the workings of the Vacation Kingdom and plans for World Showcase.

Hummel joins German industries in World Showcase

Goebel Art (GMBH), manufacturers and designers of the world reknown Hummel ceramic figurines, has signed a letter of intent to participate in a German pavilion at World Showcase. The letter of intent, signed by Herr Wilhelm Goebel, indicates that a complete line of Hummel ware will be available at the pavilion in a specific area.

continued

Discussion with several areas of industry in the Federal Republic of Germany continues as World Showcase representatives work to assemble a group of representative companies to finance the German pavilion at World Showcase.

Other areas of West German industry with whom negotiations are being conducted include tourism and travel, toy manufacturers, beer and wine companies, and manufacturers of automobiles.

Mexico continues interest in World Showcase

Visits by two prominent Mexican officials to Walt Disney World continue to emphasize the interest that country has expressed in World Showcase.

Senor Miguel Aleman, President of the Mexican National Tourism Council and a former President of Mexico, visited Walt Disney World where he was hosted by Chairman of the Board Donn Tatum. Senor Aleman and a group of tourism officials spent several days at Walt Disney World being briefed on World Showcase and the Vacation Kingdom.



Donn Tatum (R.), Senor Miguel Aleman and party inspect the WEDway PeopleMover, a pollution-free, silent transportation system, during visit to Walt Disney World.

Included in the visit were tours of the Disney property and an in-depth look at many of the innovative systems planned for use in World Showcase.

Of particular interest was the WEDway PeopleMover, which the group rode through Tomorrowland. This silent, pollution-free transportation system was recently added to the list of transportation systems approved for federal funding to cities attempting to solve mass transportation problems.



Ambassador Jose Juan de Olloqui of Mexico (L.) and Card Walker examine artist's rendering of proposed Mexican pavilion at World Showcase.

Also visiting Walt Disney World was the Mexican Ambassador to the United States, Jose Juan de Olloqui. Ambassador Olloqui, acting on direct instructions from Mexican President Luis Echeverria, met with Disney President E. Cardon Walker at Walt Disney World to discuss World Showcase and programs for stimulating tourism to Mexico.

The talks also involved exchange groups between Mexico and the two Disney parks in Florida and California, intensive promotion of group tours, and other tourist-related programs. Following the discussions, arrangements were made for meetings in Mexico in September. The meetings included talks with President Echeverria and incoming President Jose Lopez Portillo. Those attending included Disney President Walker and Jack Lindquist, World Showcase Marketing Vice-President.

Venezuelan Pavilion may include Teleferico Ride

A proposal for the Venezuelan pavilion at World Showcase features an experience that can only be duplicated by an actual visit to that country — a trip on an authentic teleferico, or cable car, highest and longest in the world, through much of that nation's beauty, culture and heritage to search for the legendary "El Dorado" City of Gold.



A re-creation of the Plaza Bolivar, typical of many cities throughout Venezuela, forms the centerpiece for proposed national pavilion at World Showcase.

Guests entering the pavilion find themselves in a re-creation of a Plaza Bolivar, including a statue of the country's national hero, Simon Bolivar, also known as the Liberator. The feeling of actually being in the country is carried further as guests board their cable car for a trip which points up the adventure, recreation and culture of this historic South American country.

In addition to this journey through the mountains and tropical forests, guests meet the friendly people of Venezuela and experience the sounds of the country through music and song.

Also an integral part of the Venezuelan experience are the national foods and crafts. All are used throughout the pavilion to establish and expand the sensation of actually being in Venezuela . . . and to interest the guest in a visit to that country.

At the conclusion of the search for "El Dorado," the guest learns that the city was a legend, but that the real City of Gold exists in the wealth of natural resources to be found in Venezuela.

Moroccan interest in World Showcase expressed

Visits to Walt Disney World and Disneyland by two top Moroccan government officials have opened the door for a possible Moroccan pavilion at World Showcase.

Recent visits by Minister of Finance Abdelkader Benslimane and Consul General to Morocco Abdeslam Jaidi and their families to both the Florida and California parks have paved the way for follow-up meetings in Morocco.

Disneyland Ambassador Christina Schindel hosted the two families at Disneyland. Meanwhile, plans are being made for future visits by a number of Disney

representatives to Morocco to establish an agreement for the pavilion.

Although no conceptual work has been done, the Moroccan pavilion would be in addition to a planned pavilion of various Arab Nations, joining together for a World Showcase pavilion.

Arab nations confer with World Showcase group

World Showcase representatives are continuing discussions with leaders of the Arab World during high-level meetings in several Mid-Eastern nations.

Walt Disney World Vice-President Bob Allen and World Showcase Vice-President C. Langhorn Washburn visited Saudi Arabia, Oman, the United Arab Emirates, and Jordan.

Contact was made with the top levels of government and business in these countries as a follow up to earlier meetings in Washington.

Representatives of 15 Arab countries met earlier with Washburn, Allen, Gordon Cooper, Vice-President of Research and Development at WED Enterprises, and Bob Matheison, Vice-President of Operations, Walt Disney World, at the Kuwait Embassy where they were hosted by Ambassador Khalid M. Jaffar. The briefing included a showing of the conceptual model of the Arab pavilion and a thorough discussion of the proposal.

Attending the meeting were; Ambassador Abdelkader Maadini of Algeria, Ambassador Mohamed A. Al-Hassan and Mr. Laith Araim, Third Secretary of Iraq, Mr. Riad Sabri, Minister of Jordan, Ambassador Khalid M. Jaffar of Kuwait, Ambassador Najati Kabbani of Lebanon, Ambassador Mohamed Nassim Kochman of Mauritania, Ambassador Ahmed Macki of Oman, Dr. Attia Abd El-Moneim Attia, First Secretary, and Mr. Al-Hafan, Minister of Cultural Affairs of Qatar, Ambassador Ali Abdallah Alireza of Saudi Arabia, Ambassador Dr. Abdullahi Ahmed Addou and Mr. Issa of Somalia, Mr. Osman A. Al-Sammahouni, Charge d' Affaires of Sudan, Ambassador Dr. Sabah Kabbani of Syria, Dr. Amor Ardaoui, Counselor, and Mr. Khaled Kaak, Attache', of Tunisia, Ambassador Saeed Ahmad Ghobash of the UAE, and Mr. Ibrahim M. Alkibsi, First Secretary, and Mr. Mohamed Khushafa, Third Secretary of Yemen.

Egyptian Ambassador Ashraf A. Ghorbal could not attend the meeting because of illness, however contacts with Egypt have continued on a regular basis and that country is still considered as a major factor in an Arab Nations pavilion.

Japanese business representatives confer on World Showcase

Delegates from nearly every major business organization in Japan have met with World Showcase officials in New York to begin discussions regarding a World Showcase pavilion.

The Japanese pavilion would be organized in much the same way as the planned Federal Republic of Germany pavilion. In this instance, a loose consortium of top industries would participate with an exhibit based on a variety of business interests to provide a total Japanese representation.

Sponsored by JETRO, the Japan External Trade Organization, representatives were invited from 50 large companies, including C. Itoh and Co., Inc., Sony Corp. of America, Olympus Corp. of America, Canon, U.S.A., Inc., Kikkoman Intl., Inc., K. Miki Moto and Co., Ltd., Japan Airlines Co., Ltd., Kirin Brewery Co., and others.

The purpose of the meeting was to establish contact with various industries of Japan and build a foundation for World Showcase participation. The discussion centered on what companies and business areas would be best represented in the Japanese pavilion at World Showcase.

The preliminary concept for a Japanese pavilion at World Showcase includes a proposal for an exciting Kubuki dinner-show as part of the experience of "visiting" the country. The traditional Japanese show, centered around an indoor pool, might include an authentic Japanese dinner served in a colorful cloth wrapper. Following the meal, the wrapper becomes a souvenir tablecloth. Another area of the proposal would feature an experience similar to a walk on the famed Ginza.

Progress is expected to continue as World Showcase representatives meet with the individual companies to further explore their interests in participation.

WEDway PeopleMover receives government approval

The WEDway PeopleMover, one of the 45 Walt Disney World attractions seen annually by millions of guests at the Florida Vacation Kingdom, has been

approved by the United States government as an official people-moving system.

The attraction, which silently transports guests through the Tomorrowland area, is powered by an electric linear induction motor. This system, utilizing electromagnetic power, has no moving parts. Quiet, smooth, and efficient, the WEDway PeopleMover was designed by the WED Imagineers as an attraction as well as a new means of mass transportation.

Acceptance by the Urban Mass Transit Administration puts the WEDway PeopleMover on a government list of transportation systems approved for Federal funding to cities attempting to solve mass transportation problems.



WEDway PeopleMover, connecting many of Tomorrowland's futuristic attractions, may be answer to mass transportation problems as well.

Orlando McCoy jetport attains international status

Orlando's McCoy Jetport has been approved by the government as a landing facility for international charter flights. The approval is expected to clear the way for more charter flights from many foreign countries for groups visiting Walt Disney World and Central Florida.

The status change allows cargo and passengers to arrive in Orlando without the additional stop in another city for customs clearance.

The move is seen as a major step in opening the doors to international status for McCoy and eventual connections with foreign airlines and international common carriers.

Formerly, foreign charter flights could land at McCoy only after previous clearance at another international airport, usually Tampa, New York or Miami.

The increase in international cargo flights is expected to have a spinoff effect on Central Florida.

Plans are underway for the addition of four major federal agencies at McCoy. The Customs Bureau, Justice Department, Department of Agriculture and the Federal Aviation Administration will expand or establish offices when approval is granted.