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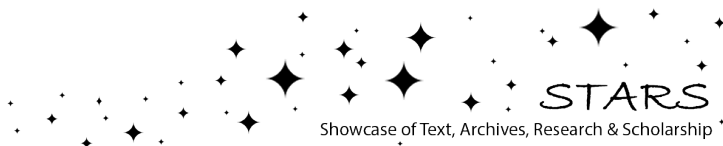
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AN ANALYSIS OF THE COMMUNICATION EFFORTS MADE BY
WALT DISNEY WORLD DURING THE ENERGY CRISIS -
OCTOBER 1973 TO MARCH 1974

BY

CAROL E. CAMPBELL
B.S., Florida State University, 1971

THESIS

Submitted in partial fulfillment of the requirements
for the degree of Master of Arts: Communication
in the Graduate Studies Program of the College of Social Sciences
of Florida Technological University

Orlando, Florida
1977

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To my husband, Steve, my heartfelt thanks for bearing with me through the long hours that should have been yours.

To my parents, my deepest affection for believing in me and making it all possible.

And to Dr. K. Phillip Taylor and my Committee, my sincere appreciation for the time, understanding and the encouragement.

To each of you - I dedicate this thesis.

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Chapter 1

INTRODUCTION AND BACKGROUND

During the energy crisis experienced from November 1973 to March 1974, within the United States, the fate of the five billion dollar tourist industry in the state of Florida was the subject of great concern on the part of thousands of residents dependent, directly or indirectly, on the industry for their livelihood. In the midst of confusion and deep concern, Walt Disney World proposed a number of alternatives and guidelines to be considered by the tourist industry and state government agencies as possibilities in a proposed unified effort to meet the challenge presented by the energy crisis.

The purpose of this study is to survey the communication efforts made by Walt Disney World during the period of the energy crisis and to determine the effectiveness of the various campaigns. An attempt will be made to determine the importance of the role communication played in combating a nationwide transportation crisis on a tourist-oriented industry. How successful was Walt Disney World in identifying the problem and alternative solutions? Were the communication techniques and tools employed successful in motivating people during the crisis? What were these

techniques and tools? Was Walt Disney World able to distinguish different communication markets and direct their campaigns to those markets? What implication does the use of communication, as a vehicle to combat an economic problem, have on the future for the tourist industry? These are the specific questions posed in the present investigation.

Concern over the possibility of a serious energy crisis in the United States had resulted in repeated discussions among economists, government leaders and oil industry officials over a period of years. In April of 1973, President Richard Nixon delivered a long-promised special message on energy to Congress. The Nixon message requesting action on major legislative initiatives was harshly criticized as coming too late and offering too little to deal with the escalating problems.¹ Nixon's message called for action to meet long-term energy problems - construction of the Alaskan pipeline, authority to encourage production of natural gas, legal ability to set reasonable standards for surface mining of coal and organization structure to administer energy programs. Not one of these requests was able to combat the more immediate problems and shortages.

In November of 1973, the long expected news came - the American people must cut back on fuel.² On November 7th, President Nixon spelled out the degree of seriousness of the energy crisis brought on by the sudden Arab oil embargo. In a

message to the people, Nixon ordered, requested and proposed a number of steps that he believed should be taken without delay.³ The effect on the American people was immediate as the recommendations began to be considered, acted upon, and carried out.

Specifically, the President wanted to see 1) heating oil supplies for homes and offices reduced by 15 percent; 2) fuel allocations to airlines cut by enough to reduce the number of flights by 10 percent; 3) thermostats in federal buildings lowered to between 65 and 68 degrees; 4) speed limits for federal vehicles lowered to 50 m.p.h. with state legislation requiring the same from private and commercial drivers; 5) contingency plans for rationing gas and fuel oil drawn up; 6) non-essential lighting ordered to end; and 7) people encouraged to car pool and use mass transit.⁴

The heart of the energy problem seemed to rest in the October war between Israel and the Arab countries. The Arabs turned to oil as a weapon to assure a satisfactory peace settlement, even before a truce between the two countries was called.⁵ All oil shipments to countries, considered by the Arabs to be pro-Israelite, were embargoed. Even oil bound for countries that reprocess Arab crude oil for resale to the United States were included in the embargo. The embargo followed cutbacks in production within the Arab countries (of about 30

percent) over previous months. Much of the rest of the world was also critically affected by the severe Arab cutbacks and embargoes.⁶

In the United States, oil prices shot up with no end in sight. Gasoline and home heating oil went up by as much as four cents a gallon on November 1st with additional increases expected December 1st. Even at the increased prices, however, oil was scarce and getting more so.

The nation's energy crisis snowballed by late November of 1973, accompanied by massive confusion over exactly what should be done about the problem. Top White House officials differed sharply on remedies.⁷ Many experts believed mandatory rationing of home-heating oil and gasoline was inevitable in the very near future. President Nixon promised that rationing would be the last resort, used only if all other actions he proposed fell short.⁸ Contradictory statements by government officials only increased the public concern and fear.

As government planners struggled with decisions, there appeared little doubt that private motorists would bear the brunt of cutbacks. Gasoline for passenger cars represented one of the largest uses of oil in the United States. U.S. News and World Report noted that transportation of all kinds accounts for 53.8 percent of the total oil consumption in the United States.⁹ Cutbacks in automobile use would provide major savings.

Evidence of the full dimensions of the energy crisis in the country became more clear each day. Electric brown-outs, even

blackouts, were predicted for many parts of the United States. Voltage reduction was ordered in six New England States where the shortages were most threatening. In many sections of the country, motorists were unable to get gas anywhere over the Thanksgiving Day weekend. Federal orders to close service stations from 9:00 p.m. Saturday to midnight Sunday were reported as very probable in the near future. Immediate rationing of gasoline and fuel oil was being urged on President Nixon by economic advisors and oil industry officials; and across the country speed limits were being cut to a maximum 50 m.p.h.¹⁰

Daily communication on the cause and effects of a fuel shortage engendered a mood of deep concern and apprehension on the part of the American people. Many feared a recession would be the result of the energy crisis as more and more companies began laying off workers. Most Americans joined in the patriotic effort to conserve energy but to certain sections of the country the actual means to a successful end to the energy crisis differed.

Severe cutbacks in fuel allocation in the area of transportation could have dramatic impact in Florida, a state dependent on tourism as its largest industry. Tourism in Florida accounted for \$5.5 billion dollars annually in revenue and, in turn, depend on private automobiles to bring 80 percent

of its visitors into the state.¹¹

Dean Gaiser, Assistant Director of the Division of Tourism of the Florida Department of Commerce, reported Florida's auto tourism down, with the northeastern section of the state most severely affected. Hotels, motels, and attractions in the St. Augustine and Daytona Beach areas reported business being off by as much as 60 percent below similar periods a year earlier.¹²

A report issued by Select Communication, Inc., an Orlando firm handling advertising, merchandising, and public relations for several Central Florida attractions warned that "because of the high proportion of auto travel, even a small decline in this market can have a large impact on total area tourism".¹³ Just how great that potential impact might be became evident as the tourist industry began to release reports of how the crisis was affecting their business.

Walt Disney World attendance, which had been up 4.4 percent from October 1 until the President's November 25 speech, dropped 12 percent in the two weeks after the speech. Stock in Walt Disney Productions, Walt Disney World's parent corporation, dropped from a high of 123 7/8 to 40 1/2 despite record sales, net income and earnings per share.¹⁴ By mid-January, Disney was forced to cutback its labor force, laying off 1700 employees. The cutback figures included about one thousand seasonal employees hired during the holiday season.¹⁵

Cypress Gardens, one of the state's oldest tourist spots, suffered a decline in attendance after recording its best November since the Garden's opened in 1932. Florida Cypress Gardens stock plummeted from 11 1/2 to 2, as they were forced to lay off 10 percent of their work force.¹⁶

Rainbow Springs began closing on Sundays and Mondays due to reduced attendance. General Manager, Bill Puryear, said a few part-time workers of the attractions 125-man staff had been laid off. "The gasless Sunday made a substantial impact on our business and forced us into the five-day week which we will continue until the fuel crisis is over", said Puryear.¹⁷

Wild Kingdom abandoned plans to open and sold its animals at auction while Bible World, a proposed \$15 million dollar attraction, indefinitely postponed groundbreaking in spite of the fact that preliminary land development was completed.

At Tampa's Busch Gardens, December attendance was reported as "disasterous". September attendance had been reported as being 18 percent ahead of the same 1972 month, October as up 30 percent and November ahead 33 percent.¹⁸

Attendance at Weeki Wachee was reported as being down, also; while a Silver Springs spokesman said attendance at that Ocala attraction dropped 35 percent in December and for the holiday period was off 40 percent compared to 1972 holiday business.¹⁹ Tourism at Cape Canaveral was down despite a launch

there in November.²⁰ At Sea World, a new \$20 million 125 acre marine life park, whose gates opened in December, first year tourist projections were cut by 20 percent from 2.5 million to 2 million because of the gas shortage.²¹

Hotel occupancy rates for the month of December plummeted from sixty-one percent occupancy in 1972 to thirty-eight percent in 1973. Although the decline in occupancy levels was due to the fuel shortage, the problem was compounded by the increased numbers of rooms built during 1973.²²

Reports from Automobile Clubs in Northern States indicated that reduced gasoline supplies, the Sunday gas sales ban and a fifty miles-per-hour maximum speed limit could force many Northerners to cancel trips to Florida. Joseph Ratke, Auto Club Touring Manager in Michigan, noted that "persons driving to Florida will be forced to alter their plans so as not to travel Saturday night or Sunday when gas stations are closed. The trip down will also take motorists an average of nine hours added driving time (from Detroit to Miami) at the reduced rate of 50 miles-per-hour".²³ Rathe pointed out that the normal three day driving trip, including two overnight stays, would now take four days. He felt that the additional costs and time would result in at least 15 percent of the expected Michigan travelers to cancel their plans.²⁴

The energy crisis had slapped a staggering blow to

Florida's giant tourist industry. After the December holiday period, the picture grew darker. The Florida State Department of Commerce estimated that about 15 percent of Florida's gross revenue, which totaled \$36.5 billion in 1973, was based on tourism, either directly or indirectly.²⁵ The Tampa Tribune reported that based on interviews across the state, tourism in January was down from 20 to 30 percent, and in a few instances as much as 50 percent.

Tolls collected from travel across toll roads and bridges were noted as being down from eight to 12.4 percent and statistics collected by the state indicated that Florida was losing the three-day visitor.²⁶ The effects of this loss were felt most by the hotel, motel and food proprietors. The decline in tourism had a domino effect, however. These statistics also indicated that money was missing from the pockets of bankers and cocktail waitresses, corporations and country stores, from the doctor and the laborer as well as shop helpers and clerks.

Unemployment trends within the tourist industry or those indirectly affected began emerging. In addition to the Walt Disney World lay off of 1,700 of its 11,000 employees, preceded two weeks earlier by Cypress Garden's ten percent reduction, Mercury Marine laid off close to 150 workers and the construction companies in the area added substantially to the unemployment figures.²⁷

The short supply of gasoline, present and anticipated, plus the stay at home psychology it engendered, was a blow on tourism. Central Floridians recognized that any government supported program to brand travel as unpatriotic could be the fatal blow. An editorial comment by the Orlando Sentinel expressed the popular opinion:

"We don't plead for special privileges for the tourist industry or for this area. All we ask is a common sense, live-and-let-live attitude toward vacation travel. If a family prefers to use it's share of fuel to drive to Orlando (or Miami, Tampa, Pensacola, or New Orleans for that matter) the choice should not be labeled frivolous or unpatriotic."²⁸

This comment best typifies the feelings and attitudes of individuals dependent on tourism to exist during the early stages of the energy crisis in the Central Florida area.

Chapter 2

POSSIBLE SOLUTIONS AND ALTERNATIVES

There has been a phenomenal interest on the part of many individuals and industries in the role communication can play in reaching the masses and motivating them to act in the desired manner. Millions of dollars are spent annually to determine the effectiveness of communication efforts and to understand which techniques are most successful in reaching and motivating people.

The period of the energy crisis in the United States (beginning in November 1973 and returning to some degree of normality by March 1974) provided an excellent opportunity for Walt Disney World to test their communication skills and concepts under actual conditions. The success or failure of the Walt Disney World communication effort could have tremendous effect not only on that attraction, but on the entire Central Florida area as well. Florida Welcome Station surveys taken at the Florida-Georgia border found Walt Disney World to be the number one destination for tourists in Florida.²⁹ Studies have also noted that at least 80 percent of Central Florida tourists arrive by automobile.³⁰ If tourists would be unable to travel to

Florida by car, as in the past, then efforts must be made to identify possible solutions or alternatives to ease the economic strain the energy crisis was to bring to bear on tourism in the state of Florida, and more specifically, on Walt Disney World.

Threats of crisis had been building for several months prior to President Nixon's televised proclamation on November 7, 1973. The real crunch, however, came after November.³¹ Walt Disney World attendance in the company's fiscal year ended September 30 with a total of 11,593,000, up eight percent from 10,712,991 of fiscal year 1972, the first year of attendance. Revenues at the forty-three square-mile park had gone up twenty-one percent, from \$139 million to \$168 million. But when Disney's fiscal 1974 first quarter ended December 31, the attendance had slipped 4.8 percent below the same quarter for a year ago.³² This despite good attendance figures during the holiday season.

In keeping with the Disney philosophy that people will continue to spend money on good entertainment, in spite of economic conditions, the Walt Disney World Marketing Department, in conjunction with top Disney officials, began identifying new objectives in an effort to solve or at least cope with situations produced by the energy crisis. In a speech December 10, 1973, before the Subcommittee on Tourism and Commercial Development for the Florida House of Representatives, Bob Allen, Vice President and Chairman of the Disney World Operating Committee outlined

these alternatives arrived at by the joint task force at Walt Disney World.

In presenting these recommendations, Bob Allen stressed the importance of the general public's realization of the scope and impact of the leisure time, travel and tourism industry in Florida; noting that anything affecting travel and tourism, transportation and recreation, entertainment and vacation patterns affects Florida's economic well-being and the jobs and financial health of it's residents.³³

Bob Allen went on to explain that the potential impact of the energy crisis could be disasterous. (The areas affected included airlines, buses, rental vehicles, trains, attractions, hotels, motels, rental condominiums, and apartments as well as tourist-oriented resteraunts and service stations.) In addition, there are many businesses involved indirectly; such as the laundry and linen industry, auto repairs and accessories and wholesale food suppliers. Other's mentioned included entertainers and hotel lounges, plus advertisers that support attractions, hotels, motels, and transportation carriers.³⁴

In proposing alternatives, Mr. Allen states that ("there is no 'alternative' if severe rationing is imposed . . . if Americans are told not to travel . . ."). However, he did offer the following suggestions or alternatives for consideration by the Subcommittee, the general public, the tourist industry, and other

concerned governmental agencies.³⁵

1. Voluntary reduction of gasoline usage before rationing is forced. This would include outlining efforts for programs of greater energy efficiency within private sectors of business.
2. To support a drive to have representatives of the national and state tourism industries to be present in governing sessions when decisions regarding rationing were made and before they were enacted. If there was no alternative to rationing, then tourism officials would work to see that the American public had the freedom and choice as to how, when and where they decided to save their allocation of gasoline. The policy should permit Americans to save and accumulate their gasoline ration over a period of time and use it as they desire.
3. Tourism officials should push to see that gas stations along turnpikes remain open on Sunday so as not to discourage the family vacation altogether. If this was not possible then perhaps the recommendation could be changed so that every other turnpike station might remain open or alternate closing on different days of the week.
4. The importance of the State Department of Tourism was illuminated. Mr. Allen urged serious consideration of proposals for increased marketing of the Florida destination in key domestic origin cities and throughout the world, as well, in such growing market places as Central and South America, Mexico, Canada and Western Europe. Mr. Allen reported that he was told by the United States Travel Service that their worldwide offices received more inquiries on Walt Disney World than any other American destination.
5. To achieve maximum results from the vast foreign market, he urged consideration of additional international ports of entry.

6. To further attract the group traveler, he encouraged the State to continue accelerating its work with mass carriers such as bus lines, AMTRAK and others.
7. Efforts should be made to achieve maximum impact from those tourists who would find their way to Florida in the next year by working to increase the current 3.2 average group size and by extending the length of stay from the current average of 12 days.
8. Leaders of tourism in Florida and particularly members of government were urged to speak up for Florida tourism not permitting policies and conditions that might be repressive or discriminatory towards travel, recreation or towards entertainment. People should not be led to believe that vacations and family recreation are unpatriotic or un-American. Instead, they should understand that vacations are vital to the health and well-being of people, both mentally and physically. Americans have traditionally turned to entertainment and recreation in time of anxiety, crisis and confusion.

In addition to the alternatives Bob Allen proposed to the Sub-Committee in Tallahassee, Walt Disney World set an internal goal of capturing a higher percentage of the Florida or resident population.) The decision was made not to develop any special program due to the heavy special events calendar laid out in the previous years planning. Rod Caborn, Manager of Marketing at Walt Disney World in 1973, determined that Walt Disney World efforts would be concentrate on (beefing up the existing advertising campaign designed to attract a higher percentage of the resident population in Florida and to encourage repeat visitation.) This principle had been working extremely well for twenty years at

Disneyland in California. (Approximately 70 percent of Disneyland's park guests are repeat visitors as opposed to 30 percent at Walt Disney World.³⁶)

The Disney organization decided to run a continuous campaign of low profile communication and advertising while at the same time, urging other members of the tourist industry to play their part in facing the crisis with similar communication techniques.

Chapter 3

ANALYSIS OF ACTION ON SOLUTIONS AND ALTERNATIVES

The reaction of the tourist industry and the State to the proposals outlined by Walt Disney World was immediate and aggressive. Following the meeting of the Florida House Commerce Subcommittee, state government and tourist industry leaders mounted a strong lobbying effort against more stringent federal fuel conservation measures. State tourism director, Morris Ford, visited Washington D.C. to communicate the concern of Florida and the tourism industry about the dangers stricter energy measures would pose to the State.³⁷ According to Ford, "the concensus was that we should get to our congressmen and make them aware" of the potential impact of stronger fuel-saving measures on Florida.³⁸

In a meeting at federal energy chief William E. Simon's office, Ford pointed out that Florida's tourism industry employs 767,000 workers and constitutes 16 percent of the state's gross product.³⁹ He also pointed out that tourism represents 194 million dollars in direct state tax revenues. Ford concluded: "I hope this has caused them to recognize the importance of tourism. We've been trying to impress on them that cheese is no more important to Wisconsin's economy than tourism is to

Florida's."⁴⁰

In January, assurances from Washington that tourism would receive high priority during the energy crisis were cheered in Central Florida and at the Capitol in Tallahassee. "We would have been trying to get across to the federal government for some time that tourism is a very vital part of the economy, so it is gratifying to hear Vice-President Ford and the energy office agreeing," said Governor Reubin Askew in Tallahassee.⁴¹ Askew noted that he was especially encouraged by the disclosure that gasoline consumption may be reduced by only 15 percent, and not the 30 percent that had originally been anticipated. But that doesn't mean we're out of the woods yet," he cautioned.⁴² He advised that the tourist industry and the state must continue making efforts to keep Washington apprised of the importance of vacation travel.

Soon after the announcement from Washington, United States Senator Lawton Chiles (Democrat-Florida) met with representatives of the top tourist industries at Cypress Gardens to discuss the impact of the energy shortage on tourism in Florida and to offer his support.⁴³

It was evident that the proposal recommending representation in energy crisis decision making was being acted upon as state officials found their requests being considered in Washington and in Tallahassee. By the end of January many service stations

along major interstate highways began staying open on Sundays providing out-of-state visitors an opportunity to gas up and begin their trips home.

Both state and individual enterprises began spending heavily on advertising and promotion to convince would-be tourists that gasoline was available for their trips. The major communication effort was on! To squelch rumors, the state of Florida spent \$300,000 in tax monies over a two to three week period for advertisements in a dozen big city northern newspapers. The advertisements said that surveys showed "travelers coming from as far away as Seattle and from Canada had little or no trouble getting gasoline".⁴⁴

Through the advertisements, an effort was made to change people's attitudes that vacations were unpatriotic and communicating to readers that in order to be a productive American, "you and your family need the three 'R's' REST, RELAXATION, and RECREATION", and that there was no better place for this than in Florida.⁴⁵ The campaign conveyed the idea that vacationers might even save fuel by closing up their homes while visiting sunny Florida.

The message was reinforced by the text of a telegram sent to Governor Reubin Askew of Florida from William E. Simon, Administrator of the Federal Energy Office reading:⁴⁶

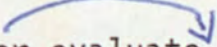
"Yesterday, December 20th, we asked all service stations to limit gasoline sales to ten gallons per car and also asked the American

people to make the ten gallons last all week.

In doing this we are not trying to prevent anyone from taking a vacation. We certainly recognize the need for American citizens who have worked hard all year to take their much needed vacation.

However, we do feel that conservation measures are necessary to overcome the current gasoline shortage, and this announcement is aimed at encouraging the American people to conserve.

To further enhance the success of the major effort to reassure potential tourists of the availability of gasoline in Florida, the State also printed ten thousand postcards to hand to tourists at it's welcome stations, with a request that motorists mail the "gasoline available" message to friends back home. To help back up this claim, Governor Askew ordered gasoline stations on state turnpikes to stay open on Sundays.⁴⁷

To better evaluate  the potential impact of the energy shortage on the leisure-recreation industry, the State of Florida Department of Commerce utilized a study entitled "Sensitivity of the Leisure-Recreation Industry to the Energy Crisis".⁴⁸ The results of this study provided a base of information from which to draw when meeting with officials from the Federal Energy Office by providing a better picture of the leisure-recreation industry. The report attempted to define and classify the components of the leisure-recreation industry by identifying key parameters which characterize the industry and define it's

sensitivities to fuel shortages. In addition assessments of the nature and reliability of data which were available enabled the researcher to examine the impact of energy shortages and conservation policies.

Research and evaluation were important elements in the communication effort with federal and state officials. In the very short period of time available in which to act, members of the leisure-recreation of tourist industry were called on to provide and supplement information in order to present a complete picture. For the first time in twenty-five years, the industry was working together to the benefit of all with the common goal of protecting the future of the industry and the State.

Individually, as proposed by Walt Disney World in the Sub-Committee meeting, tourism businesses were involved in developing voluntary energy efficiency programs in an effort to meet the country's needs in time of trouble as well as to reduce individual operational costs that cut deep into business profits.

(The engineers and planners at Walt Disney World were actually far ahead of the government in foreseeing an energy crisis. When the Park was built in 1971, they installed their own generators. In 1973, the Park was producing one-third of all it's electricity. The electricity-producing generators were turned by two jet airplane engines. Innovators at Disney came

up with a means to conserve more energy by building a system that trapped the exhaust from the jet engines to be used to heat and air condition the Park. Even before the energy crisis, Walt Disney World began a recycling program for all glass, metals and paper used in the Park.⁴⁹

At the meeting of the Subcommittee in Tallahassee, Mr. Ted Crowell, Vice-President of Facilities at Walt Disney World, outlined steps being taken at the Disney theme park as part of a voluntary reduction program in the interest of conserving fuel and energy.⁵⁰

1. Winter time temperatures in offices were to be maintained at a maximum of 68 degrees.
2. Company drivers were directed to restrict speeds to 50 miles per hour maximum.
3. Employee addresses were assembled by zip code and made available to encourage the sharing of automobiles. The company helped in the arrangement of car pools. Increased bus service was under study.
4. Temperature settings for hot water and chilled water produced by the Reedy Creek Energy Plant were adjusted to produce a saving of energy.
5. Infrared photography was used to check for any possible underground leaks in fuel lines.
6. Lighting for decorative purposes was reduced. Photo-electric cells were installed to turn lights on only during hours when daylight was insufficient.
7. A new plan to grind all trash and return it to the ground under the Supersoil process of waste

treatment was proposed to begin within the year, eliminating the need for incineration which used natural gas.

8. A study in cooperation with Walt Disney World utility system and the University of Florida was to begin to make use of solar energy for heating swimming pools, recharging golf carts and other uses involving solar converters.
9. A new more efficient electric car was under study with the possibility of future electric powered buses, for inter-property use. The highly efficient WEDWAY Peplemover was to be installed in the next year making use of the electric power system for propulsion.
10. Special artwork created by Walt Disney World advertising "Turn Me Off" was placed in many strategic locations to encourage employees to turn off lighting when they leave shops or offices.

Members of the tourist industry were encouraged to join in the effort. Walt Disney World set the pace for others to follow and placed emphasis on communicating the news of their efforts to the public at a time when energy saving tactics and good public relations for the tourist industry were most advantageous.)

A Florida tourism committee chairman brought to light the realization that visitor-dependent businessmen must pay to promote Florida vacations. The appeal came from Donald Keck, Chairman of the newly formed Tourism Recreation Committee for the Governor's Fuel Allocation and Conservation Council and Vice-President of Marketing for ABC Scenic Attractions Inc., which owns Silver Springs and Weeki Wachee Springs.⁵¹

At a meeting of the Orlando Area Sales and Marketing Executives Association, Keck pointed out that the citrus industry taxes itself five to ten cents a box of fruit, affording to the industry \$23 million dollars to sell it's product. Citrus is only Florida's second highest revenue producer while tourism is its first according to Keck.⁵² It was his recommendation that travel oriented firms, innkeepers and resteraunteurs contribute funds for research on Florida vacationers. The concept of self-taxation for promotional purposes had already been approved by the Orlando Area Innkeepers Association Inc., which merged in December with the U.S. 192 Innkeepers Association.⁵³

The Innkeepers Board Chairman Hugh Snow, said officials of hotels and motels in the association, representing eleven thousand rooms, had committed to a plan whereby a daily nickel per room tax was to be posted regardless of whether the rooms were occupied or not. Funds generated would enable the association to spend a minimum of \$200,000 a year on advertising campaigns in major northern and midwestern cities across the country. The campaign would center on a theme like "see it from Orlando".⁵⁴

In an effort to meet immediate needs, the Miami Beach Tourist development Authority shifted \$150,000 of it's national advertising and promotion budget from summer to winter use.⁵⁵ The tourist industry was again reacting to proposals

from Walt Disney World's Bob Allen to increase marketing of the Florida destination to key domestic cities. Local businessmen joined the State's Department of Tourism in seeking to communicate information on Florida, and specifically areas within the state, to potential Northern visitors.

Walt Disney World concentrated additional efforts along this line at the same time. By identifying "target market cities", members of the Walt Disney World marketing team began to coordinate major efforts to reach and stimulate residents of Northern cities.⁵⁶ These efforts would not resolve the immediate need but would be the start of a massive education program on Walt Disney World.

Representatives would visit the cities identified and selected as "targets" four to six weeks prior to the promotion. They would meet and coordinate plans for a major radio-television blitz of information with informative advertisement and commercial messages that would provide the potential visitor with a clearer picture of exactly what Walt Disney World encompasses.

Most people who had never visited Walt Disney World saw it as a big amusement park, never realizing that the forty-three square miles was instead a total vacation destination resort - complete with resort hotels, golf courses, beaches and pools, sailing and skiing and unlimited nighttime entertainment. Through the medium of television and radio, people were able to see as

well as hear about the activities available.

A top rock radio station in each city sponsored a contest, in conjunction with area Sears stores, giving away free vacations to Walt Disney World to its listeners. The campaign concluded after several weeks with a visit to the target city by several Disney characters and the Walt Disney World Ambassador. During that final week, the characters accompanied by the Ambassador and Marketing representatives, made personal appearances at radio stations, on television talk shows, at large shopping malls and at children's homes and hospitals.

In conjunction with the visit, local travel agents and motor club agents were invited to attend informational sessions where they viewed movies and slide shows describing Walt Disney World and its wide range of activities. Informational brochures were provided along with colorful posters depicting different areas of interest at Walt Disney World. These informational sessions were but another way to communicate a message to thousands of people on a large scale yet with a variety of different communication tools and techniques, reinforced over a period of several weeks.

A major means of communicating to a national market was accomplished through implementation of a national brochure published by the Walt Disney World Marketing Division.⁵⁷ The national brochure was intended to accomplish three objectives:

1. Communicate that Walt Disney World was a Total Destination Resort.
2. Identify the specific elements that comprise this Total Destination Resort including:
 - a) Magic Kingdom
 - b) Lodging
 - c) Recreation
 - d) Dining
3. Influence long-range vacation planning to Walt Disney World.

The brochure was a six-panel, four color picture information piece. Because of the long range nature of the brochure, no information subject to change was included. Distributed upon request by organizations like AA, travel agents or chambers of commerce, the brochure was designed to provide vacation planning information to individuals either by themselves or through a group/travel vendor.

The national brochure was distributed by direct mail through three primary sources:

1. Walt Disney World Central Reservations Office . . . forwarded with reservation confirmations, reservation requests and requests for vacation information at Walt Disney World.
2. Information letter services of Guest Relations in response to questions asked about Walt Disney World.
3. Cody Publications supervised by the Advertising/Promotion Department, Walt Disney World as a fulfillment house for requests from AA, Chambers of Commerce, Travel Agents and Organized Groups.

During this same time period, Walt Disney World was also relying heavily on advertising tie-ins with other corporations through a "Participant" or sponsorship program. In 1973, Walt Disney World had twenty-four of America's leading companies as major sponsors and participants in the Vacation Kingdom in Central Florida.⁵⁸ The Disney Park provided a "show-place" for businesses whose brand names were household words across the country.

Some of the participants presented major attractions, while others sponsored exhibits, or restaurants or provided products or special services for guests. Members of Walt Disney World participant group included such business firms as: Benay-Albee Novelty Co., exhibitor in the Magic Kingdom hat shops; Borden, Inc., official supplier of milk and dairy products in the Magic Kingdom and sponsor of a unique turn-of-the-century ice cream parlor on Main Street, U.S.A.; Coca-Cola USA, sponsor of the Tomorrowland Terrace restaurant and Refreshment Corner ^{restaurant} resteraunt on Main Street; Eastern Airlines, official airlines of Walt Disney World and sponsor of a major attraction in Tomorrowland; Florida Citrus Growers, sponsor of a major attraction, the "Tropical Serenade", and the "Sunshine Tree Terrace" refreshment location, both in Adventureland; Frito-Lay and Pepsi-Cola, joint sponsors of the "Country Bear Jamboree" attraction, the Mile Long Bar and Pecos Bill's Cafe in Frontierland; GAF Corp., supplier of consumer photo products throughout the Vacation Kingdom and

sponsor of an exhibit on Main Street.

Others included GoodYear Tire and Rubber Co., sponsor of the Grand Prix auto racing attraction in Tomorrowland; Gulf Oil Corp., which provided the official petroleum products for the Vacation Kingdom, furnished exclusive automotive and touring services to guests through an "automotive care center" and sponsored a major entertainment attraction, "The Walt Disney Story", on Main Street; Hallmark Cards, Inc., operated a shop on Main Street; Elgin National Industries, exhibitor in a store on Main Street and official manufacturer of Mickey Mouse and other Disney "character" watches and clocks; the Hertz Corp., the official Rent-a-Car company for Walt Disney World; Kal-Kan Foods, supplier of the official pet food for Walt Disney World and sponsor of a unique pet motel at the entrance to the Magic Kingdom.

Also participating were Oscar Mayer and Co., sponsor of Town Square Cafe on Main Street and the official supplier of processed meats in the Magic Kingdom; Monsanto Co., sponsor of Circle-Vision's "America the Beautiful", a major attraction in Tomorrowland; RCA, which was working with the Disney staff to develop a major attraction in Tomorrowland (Space Mountain); Savannah Sugar Refinery, producer of Dixie Crystals, exhibitor in Main Street Market House where it also operated an old-fashioned penny candy counter; the J.M. Smucker Co., which operates a mail-

order service of the company's jams and jellies in the Market House; and Welch Foods, Inc., which sponsored a refreshment area in Fantasyland. And finally, U.S. Steel's Realty Division which manufactured the steel-framed, modular rooms for the two vacation Kingdom hotels, the Contemporary Resort Hotel and the Polynesian Village.

During the energy crisis several of the participant companies ran national advertisements drawing on the relationship with Walt Disney World. Eastern Airlines ran an especially heavy schedule of Disney/Eastern ads inviting people to take advantage of their special package deals as the "official airlines of Walt Disney World". In a personal interview, Paul Auger, Manager for Disney Marketing with Eastern Airlines, reported that Eastern load factors were up significantly by late March and early April.⁵⁹ (Greyhound buslines joined their name with Walt Disney World in a series of advertisements promoting the use of mass transportation as a means to vacation at Walt Disney World during the energy crisis.)⁶⁰

In February, March and April of 1974, Ford Motor Company released an ad that was not developed to meet Disney Marketing needs but rather to meet Ford's needs.⁶¹ In fact, the time of conception was prior to any mention of a crisis. However, the timely release came during a period that the crisis was at its worst. Copies of the Ford ad showing new Ford Wagons in

front of Cinderella Castle at Walt Disney World and surrounded by familiar Disney characters reached approximately 20.8 million readers through Better Homes and Gardens. In addition, the same ad was released in Time - April 1, 1974 (out March 25); Newsweek - February 18; 1974 (out February 12); Southern Living - March, 1974 (out February 15); Field and Stream - March, 1974 (out February 24) and Outdoor Life - March, 1974 (out February 25).⁶²

(With the national marketing effort well under way, Walt Disney World turned it's attentions to the previously untapped foreign markets. According to an unofficial poll conducted by the United States Travel Service of the U.S. Department of Commerce, the tide of international tourism was turning with tourists from Japan, Britain, France, Germany, Italy, Canada and Mexico attracted to the United States' man-made wonders - including Walt Disney World.⁶³) In January 1974, Sandy Quinn, Director of Marketing for Disney World, announced the recent opening of foreign offices in London, England and ^{Tokyo} Tokyo, Japan to encourage travel to Disney World and Disneyland. They were not opened specifically to fight gasoline rationing", but they take on a much greater importance if we considered rationing", Mr. Quinn said.⁶⁴

Company officials also began working on legal changes needed to allow foreign flag cruise ships to stop at nearby spots such as Port Canaveral to allow tourists to visit Walt Disney

World and the Central Florida area.⁶⁵ Proposals were made to have McCoy Jetport changed to an international airport.

To encourage potential foreign visitors, Walt Disney World began a series of foreign promotional tours in November and December through Central and South America and eastern Canada. January 7 to the 13 was named "Salute to Canada Week" at Walt Disney World featuring special entertainment, parades and honored guests from Canada.⁶⁶ Charlie Ridgeway, Manager of Publicity at Disney, explained that close to a million Canadians travel to Florida each year, most of them during the winter. At that time, more visitors came from Canada to the Vacation Kingdom than from any nation outside the United States.⁶⁷

In conjunction with major efforts at attracting foreign visitors, Sandy Quinn outlines other actions being taken by the company in the area of mass transportation. Working with Michael Sarka, an official with Discover America Travel Organization Inc., a certain degree of optimism about the role mass transit could play emerged. Sarka admitted that Discover America did see a trend toward more mass transit and more package tours. More Americans would probably combine conventions and other business trips with vacations, he said.⁶⁸

However, Sarka contended that it would be impossible to switch all vacationing Americans overnight to forms of mass transit as a means of saving fuel. Even at full capacity, available mass

transit could only accommodate one-third of the country's tourists.⁶⁹ This fact was further substantiated by the State Department of Commerce report discussed earlier which showed estimates based on average load factors for the scheduled airlines during 1971, 1972 and 1973 (approximately 50 percent in all three years) and assuming 1) no flight reductions 2) all available seats being used for leisure-recreation trips, 3) all destination requirements match flight schedules, indicated that the airlines could absorb only eight percent at maximum of the historical leisure-recreation trips made by automobiles on trips longer than one hundred miles.⁷⁰ Since load factors on popular vacation routes were far greater than the average and since scheduled flights did not serve many of the destinations required for visiting and outdoor recreation it was estimated that airlines could at most absorb passengers from a two to five percent reduction in auto travel. Other mass modes (bus and rail) were found not to have sufficient equipment to absorb a significant percentage of the automobile trips.⁷¹

Though it was obvious that mass transit would not completely solve the transportation problem, it remained evident that the various mass modes could increase their influence over problems created by the energy crisis. Package tour plans through air lines, buslines, and train lines were encouraged.

In January, Sandy Quinn announced that he was making

efforts to set up a meeting with AMTRAK officials "to get them to give us more service from the Chicago and New York areas".⁷² He was also working with airline officials to encourage more flying to Walt Disney World. "There are over 700 airline seats a day coming into Orlando, and only 60 percent have been filled. So we have a 40 percent factor we could fill with people who ordinarily drive".⁷³

Just weeks after Mr. Quinn's request for meetings with AMTRAK officials, they announced plans for a new train - 'The Vacationer', which would run between Indianapolis and New York to add to their existing service which included four trains from New York daily plus one from Chicago. Through cars linked both Montreal and Boston to Florida destinations via Washington D.C.⁷⁴

In cooperation with tour operators, hotels, a cruise line and rental car firm, AMTRAK packaged a new series of Florida Vacations. One of the biggest new bargains announced was "Florida Tradewinds" which offered eleven days and ten nights in Florida for \$269.00. The package included two full days at Walt Disney World, three nights in Orlando, three in Ft. Lauderdale and four in Key West.⁷⁵

In conjunction with the special packages and new lines offered, AMTRAK announced the selection of Poinciana as site for the new railroad auto ferry service connecting the midwest to Central Florida tourist attractions. The terminus named was

located adjacent to US17-92 and within minutes of both Florida Turnpike and Interstate 4. The Indianapolis terminus for the train was designed to serve tourists who would drive their cars there from such midwest points as St. Louis, Chicago, Detroit, and Cleveland.⁷⁶

(Disney-created package tours to Disney World and Disneyland were being promoted by Pan American World Airways on all its routes throughout the world and by Eastern Airlines which was both wholesaling and retailing package tours.⁷⁷ Travelers had their choice of Eastern's on-site vacations or combining a visit to the Magic Kingdom with a holiday at another Eastern sun destination. In all, Eastern planned sixteen different vacation packages around Walt Disney World. All were covered by money-back guarantees and included Magic Kingdom admissions and attractions coupon booklet as well as accommodations at the Contemporary or Polynesian Village resort hotels, round trip transportation between the Orlando airport and hotel, and a luau experience during the two to three day visit.⁷⁸

^{Busses} Buses continued to be a viable source of transportation within the Central Florida area as well as across the nation. Tourism officials went into action again to urge that the state encourage the use of tour buses, rather than curtailing their activity as some legislators proposed as a means of conserving fuel. One bus would carry fifty automobile drivers and help

the entertainment industry and the state on firm ground.⁷⁹ One day bus tours offered through motorclub offices in Central Florida as well as extended package plans on national carriers grew in popularity as a way to travel and still save gas.⁸⁰

In the continuing effort to be prepared for whatever the energy crisis may bring to bear, Walt Disney World began an extensive program of making certain that it got a major share of available tourist dollars it also identified a potential resident market for a new campaign thrust.⁸¹ The plan to achieve a maximum impact from tourists that were able to get to Florida along with efforts at increasing group size and length of visit were all recommendations made to Florida's tourism industry in the message to the Subcommittee.

Walt Disney World was not acting alone in the drive. For as Disney let loose its campaign to attract more local business, Silver Springs also began its own local promotion, offering special discounts on weekends. At Busch Gardens in Tampa, weekend entry prices were cut from \$4.50 per person for adults and \$3.00 for children to a straight admission of \$2.50. Both attractions ran special promotions for senior citizens. Said a Busch Gardens spokesman: "If there aren't going to be as many out-of-staters around, we've got to get the business in our own back yard".⁸²

At Walt Disney World, this was to be accomplished by close business monitoring through the Department of Research and Statistics.

Bill Bieberbach, Manager of the department, explained that it was his responsibility to be familiar with the type of guest that visited Walt Disney World. Through use of periodic surveys and polls, Walt Disney World was able to get a clear picture of the kind of people that made their way to Florida and Walt Disney World, what attracted them to the Park, how many times they might have visited before, how and when they planned their vacations, where they came from and what means of communication provided the most information to those individuals visiting.⁸³

Disney relied heavily on information from the State Department of Commerce acquired through normal quarterly highway studies conducted at the Florida border stations at I-95, I-75, I-10, US 301, and US 231 and through inflight surveys with airline passengers⁸⁴ (Appendix A). These were added to results of surveys through Disney's own on-going systems at the Toll Plaza, Main Parking lots and within the Theme Park itself. Based on these surveys, Disney identified two major markets to follow - tourist and resident.

Surveys taken over the time period under study indicated that the tourist distribution averaged 70 percent while the resident distribution was only 30 percent (see Table 1).

Table 1

Walt Disney World
Audience Distribution
(in Thousands)

October to March for 1972-73 and 1973-74

<u>TIME PERIOD</u>	<u>TOURIST</u>	<u>RESIDENT</u>	<u>TOTAL</u>
October	68%	32%	100%
November	70%	30%	100%
December	68%	32%	100%
January	69%	31%	100%
February	76%	24%	100%
March	69%	31%	100%
First Six Months (1973-74)	<u>70%</u>	<u>30%</u>	<u>100%</u>
First Six Months (1972-73)	<u>71%</u>	<u>29%</u>	<u>100%</u>

This distribution changed very little overall during the period in spite of marketing attempts to draw the resident.

A special Florida Resident and Tourist Study conducted by the Research and Statistics Department recommended a detailed approach to the effort. First, that extensive advertising take place in the cities and counties with the greatest tourist penetration as determined by the study (see Appendix A and C). This would be in the form of a) mass media-television and radio, b) billboards, and c) promotional materials. This would include the Central Florida

region as well as the major Florida markets. The state was divided into five major areas based on television network stations in order to concentrate television ads effectively (see Appendix D). By advertising on Florida television, Disney hoped to motivate residents to drive two hundred miles to fill rooms left empty by Northerners afraid to drive two thousand.⁸⁵

Disney marketing found that the 6 and 11 o'clock news periods had the greatest viewer participation. Tourists were especially interested in keeping up with the news during the months of January, February and March in order to find out what was going on at home. Television proved to be an excellent medium for Disney advertising and, along with radio, became the primary media source for the campaign to reach the people. However, the printed media played an important part as well.

Printed promotional material included a State brochure, Welcome brochure, the GAF Guidebook, "Walt Disney World News", "Preview of Your Visit to Walt Disney World", Fort Wilderness Color Brochure", and "This Week at Walt Disney World".⁸⁶

The State brochure was intended to influence first-time visitors to Walt Disney World, plus to entice repeat visits from individuals who had visited previously. The distribution was primarily through rack services, welcome stations and state chambers of commerce.⁸⁷

Walt Disney World employed four different rack distribution

services in the southeastern United States to distribute the State brochure to information literature racks in motels, hotels, chambers of commerce, AAA, key tourist locations and selected service stations. The rack services hired by Walt Disney World were chosen because of their heavy penetration into major interstate highway routes and heavily traveled state highways leading into Central Florida. The four services were:⁸⁸

- a) Southern Folder and Distribution Company, Miami - serving Southern Florida including Dade, Broward, Palm Beach, Hillsborough and Orange Counties.
- b) Helinger and Associates, St. Petersburg - serving I-95, I-75, US 301, US 19 and US 27.
- c) Helinger and Associates, St. Petersburg (seperate service) serving I-75 from Gainesville north to Atlanta.
- d) Florida Folder Service, Daytona Beach - serving northeastern Florida with emphasis on Daytona, Ormond Beach and Jacksonville, I-95/A1A route along the coast.

- The Welcome brochure was essentially a "local distribution piece" intended to influence the Walt Disney World day guest entering the Main Parking Entrance and the local motel guest in key Orange, Osceola and Seminole county motels.⁸⁹ The brochure was designed to:

- a) plan a more efficient visit to the Magic Kingdom by encouraging guests to visit the most popular attraction at their lowest ebb and to visit less attended attractions at times when the most popular attractions are at their park.
- b) influence the guest to experience entertainment

opportunities outside the Magic Kingdom (example: Pioneer Hall, Treasure Island, Luau) and to plan these opportunities before visiting the Magic Kingdom; possibly encouraging that guest to remain in Florida for a longer visit.

- c) depending on the season to influence the guest's visiting pattern in terms of timing.

It was determined that the most effective means of accomplishing the objectives of the brochure was to concentrate on it's off-site distribution to influence guests immediately prior to their visit. While there was no survey of other specific information relating to the best time to influence guest behavior, it was suggested that guests are not particularly interested in specific information (show times, park hours, etc.) until they were within a few hours of moments of their visit.

The off-site distribution was determined as being particularly important to those guests utilizing local motel shuttles service and not receiving the Welcome Brochure at the Main Parking Entrance. The key off-site locations included:

- a) US I-92 Motels
- b) Beeline Highway/US 528/435 Motels
- c) Court of Flags Resort Hotels
- d) Sanford-Orlando I-4
- e) Amtrak terminal
- f) Motor Inn Plaza
- g) Area Chambers of Commerce
- h) Orlando AAA
- i) McCoy Jetport
- j) rental car agencies at McCoy
- k) key motels along I-4/WDW to Lakeland

Additional literature was made available to the guests once they arrived. The first being a GAF Guidebook intended to provide

day guests to the Magic Kingdom with specific information in order to assist the guests in finding their way around the Theme Park, locating specific interest elements, determining prices and show times and other specific information relating to the Magic Kingdom.⁹⁰ The GAF Guidebook differed from the National and State brochures in that it provided specific Magic Kingdom information as opposed to information regarding all of Walt Disney World. The GAF Guide differed from the Welcome brochure in that the GAF Guide was aimed at the Magic Kingdom first, while the Welcome brochure focused on specific elements outside the Magic Kingdom. The GAF Guide was distributed inside the Magic Kingdom, in check-in folders at the Disney resorts and to area hotels buying large blocks of tickets for resale.

The "Walt Disney World News" was an eight-page, monthly publication serving the Walt Disney World resort hotels, campgrounds and Motor Inn Plaza hotel guest.⁹¹ Designed for quick changes, the newspaper provided resort guests with information on all activities available throughout Walt Disney World in terms of entertainment, dining, recreation and special events and activities.

"Preview of Your Visit to Walt Disney World" was a color brochure used as a mailer by Central Reservations for forwarding advance information on Walt Disney World to confirmed hotel guests and campground guests.⁹²

The Fort Wilderness Color Brochure was intended to reach campers or potential campers during their travel within Florida or on their way to Florida. The brochure was distributed on informational literature racks along interstate 75 from Walt Disney World north to Cincinnati, Ohio through Helinger and Associates, St. Petersburg. Florida Folder Service also distributed limited quantities in the northeastern Florida area.⁹³ The brochure was also distributed through selected leading campgrounds throughout the southeastern United States.

"This Week at Walt Disney World" was a one-page flyer with specific information aimed at hotel, campground and a limited number of day guests who visit the hotels in addition to the Magic Kingdom.⁹⁴

A second recommendation based on the Disney Marketing survey was immediate implementation of a two-day ticket book for off-site visitors to stimulate second day visits.⁹⁵ This was but part of a major effort to encourage residents and tourists alike to repeat their visits to Walt Disney World. A major means of promoting this was through special events or activities scheduled in the Magic Kingdom.

During the period of the energy crisis, Disney had no special campaign, according to Rod Caborn, Manager of Marketing. Instead, the determination was to beef up their existing campaign to concentrate more heavily on events previously planned.⁹⁶

Soon after the special holiday events surrounding Christmas and New Years were completed, Walt Disney World opened Pirates of the Caribbean with dedication ceremonies led by Rock Hudson.⁹⁷ At Fort Wilderness Campgrounds a new steam railroad opened amid festivities.⁹⁸ As attendance continued to slip a "huge expansion" program was outlined adding ten new Magic Kingdom adventures, a 153 room golf resort hotel, doubled campground facilities and expanded sports, dining and transportation. The expansion included an announcement on the opening of Space Mountain in late 1974, and in the more distant future - EPCOT, the Experimental Prototype Community of Tomorrow.⁹⁹ These announcements were made to motivate potential and/or previous visitors to see the new additions whether it be next week or next year.

In January, Walt Disney World also hosted "Salute to Canada Week" followed closely by "Small World Days" January 19 and 20.¹⁰⁰ Internationally themed decorations and parades were featured along with complimentary admissions to Fantasyland's "It's a Small World". In February, "I am an American Day" was a star-spangled salute to the birthdays of Presidents George Washington and Abraham Lincoln. Within the Magic Kingdom there were celebrations featuring special parades units and costumed characters with military bands participating in "I am an American" ceremonies.¹⁰¹ Area newspapers were encouraging residents to visit Walt Disney World and "avoid the lines" of holiday periods.¹⁰²

Disney Marketing did add one special event to the calendar during this period. In a concentrated effort to entice area residents to visit the Magic Kingdom and to encourage many to return, plans were made to host a special "hard ticket" Valentine's Day party and feature big name entertainment to determine if the entertainment might influence the residents to step out. One of the nation's most popular recording groups at the time, Tony Orlando and Dawn, were featured on the February 8th party night. Also included on the bill of fare was Grassroots, another popular rock group.¹⁰³

The general admission included unlimited use of all attractions and was the first time a single ticket admittance policy had been offered to the public at Walt Disney World. The party was a sell-out and seemed to show that special entertainment could indeed influence the resident population to visit and revisit the Magic Kingdom during the year. Of those surveyed on the evening of the big Valentine's Day Party, 93 percent said that this visit did not take the place of a future visit and that radio advertising had prompted 65 percent of the visitors to go to the Valentines Party.¹⁰⁴ (see Appendix E).

In late March of 1974, Walt Disney World released "Magic of Walt Disney World" - a special one hour television program on the Vacation Kingdom of the World - aired on nationwide television. The program, produced prior to the energy crisis,

brought a tremendous response enabling the Central Reservations Office for Walt Disney World to set all time records.¹⁰⁵ In a continuing effort to promote the tourist industry as a whole, Walt Disney World gave the Florida Department of Commerce access to the film distribution for use in state tourism activities.

Chapter 4

RESULTS AND EVALUATION

In assessing the degree of success or failure of the Disney communication campaign during the energy crisis, it is necessary to evaluate the program on its individual points rather than collectively to acquire the clearest indicators. That the oil embargo was damaging to Florida tourism went without saying. By March, the tourist industry was forced to absorb losses of about 600 million dollars in trade and the State another 30 million dollars in tax revenue.¹⁰⁶

In May, Governor Reubin Askew told Florida's top business leaders, at a meeting of the council of 100, that the economic downturn had "bottomed out".¹⁰⁷ For the first time since the energy crisis began, more out-of-state tags were being seen in the parking lots of the tourist attractions that had seen mostly Florida tags all winter.¹⁰⁸

March had been a very difficult month for Walt Disney World in terms of attendance running 23.5 percent behind March, 1973. In April, however, attendance rebounded sharply, with as many visitors in April, 1974 as in April, 1973.¹⁰⁹

A Disney World spokesman credited the improvement to the lifting of the oil embargo on March 19. Reservations at Disney's three hotels and the campgrounds were running 43 percent ahead of the same period the year before. "These trends were confirmed (during April) by an upturn in the number of cars entering Florida, as well as an increase in the number of reservations being made for the summer season at Central Florida hotels and motels" the Disney spokesman said.¹¹⁰

The change in visitation patterns must be attributed to a large degree to the lifting of the oil embargo by the Arabs. But other things had also happened that might have played a significant part in the new optimism for tourism during the remainder of 1974. It is these activities that will be evaluated within this section.

Proposals made by Walt Disney World in December had been acted on with various degrees of success. The first had been a proposal for voluntary rationing and energy saving programs by individual companies within the tourist industry. At Walt Disney World, this was accomplished through numerous cutback and conservation programs outlined previously, resulting in an average of 20 to 25 percent reduction in energy use.¹¹¹ These included reduction of decorative lighting, control of building temperatures, use of jet engines for power, harnessing exhaust air from generators for heat, and better control of chilled water for cooling.

Proposals for the future included the introduction of the WEDWAY People Mover (as a low-energy means of mass transportation) and a program for the development of solar energy as a parallel source of power. In January of 1975, the WEDWAY People Mover began operation in Tomorrowland within Walt Disney World's Magic Kingdom with plans for the future to incorporate the People Mover within the World Showcase or Disney's Experimental Prototype City of Tomorrow (EPCOT). The People Mover was heralded by transportation authorities as another prospective answer to the increasing needs of moving large masses of people efficiently, quietly and without pollution. In 1976, funds were allocated by the federal government for the building of a solar energy laboratory at Walt Disney World in conjunction with the University of Florida. Groundbreaking was scheduled for February of 1977.

Elsewhere in the industry, hotels and motels and restaurants launched individual programs to cut decorative lighting. In many facilities customers were given lower temperature hot water and were forced to do without escalators during off hours. In winter, extra blankets were provided to encourage cooler nighttime room temperatures. For summer, thermostats were turned up to eighty degrees to cut down on air conditioning.¹¹²

These efforts were only successful after the government officials clearly communicated to business owners and management

the critical need for conservation of energy as a patriotic measure as well as a money-saving technique. The owners and management, in turn, developed their own techniques of passing the message on to their customers and employees through use of such tools as cartoon signs reminding guests and employees to "turn the lights out" and that "exercise is healthy - walk instead of ride". During the time of the energy crisis, the voluntary rationing or reduction programs were generally well accepted. Just how long the conservation measures were in effect is difficult to assess.

For many large industries energy efficiency programs proved to be good business. "With or without an energy crisis, most of these belt-tightening measures make sense, just in the money they save a company", reported one executive.¹¹³

A second proposal made by Walt Disney World to the tourist industry was to push to have members of the industry involved in any decisions regarding rationing that might be made at the state and national levels. Again, active measures were taken to assure that the tourist industry needs and wants were communicated to federal and state officials involved in energy decision making. Within weeks of Walt Disney World's recommendations to the Subcommittee on Tourism, Morris Ford, State Director of Tourism, met with Governor Reubin Askew and Federal Energy Administrator William Simon to present a picture of the effects of their decisions might have on the economy of the state.

The results were good. State Senator Lawton Chiles flew back to Florida to meet with tourist industry officials to discuss their problems. Federal Energy Administrator William Simon sent a message to Governor Askew reassuring him that his office was not trying to persuade the American public that vacations were somehow unpatriotic.

Serious rationing was fortunately avoided, primarily because oil supplies were not reduced to critical levels prior to the end of the oil embargo. Had the embargo continued, the story might well have been different. However, it seems safe to assume that tourist industry efforts to communicate their plight did have some effect on the government and may have helped to avoid serious panic by energy officials.

The third proposal to reopen Turnpike service stations on Sunday, ran parallel to other tourist industry communication efforts. Based on efforts made by industry spokesmen at the state and national level, Turnpike stations were ordered to reopen on Sundays. This enabled tourists to travel freely every day of the week with gasoline available putting an end to the concern on the part of the tourist that it would be impossible to travel on the weekend - the time a majority of long distance travelers planned their trips.

a fourth proposal, and possible one of the major proposals in terms of long range significance was the one recommending an

increase in marketing to key domestic cities in the United States. The importance of the State Department of Tourism was also stressed. Results in this area are particularly significant in that for many years the tourist industry had been made up of a very independent group of individuals acting primarily for their own benefit. During the energy crisis, this group of attractions, hotels, motels and restaurants were forced to work together to the benefit of the industry as a whole rather than to individual attractions or sections of the state.

The result has been a stronger association with greater lobbying power and certainly more economic power. The State Department of Tourism was encouraged to play a very active role in seeing that people throughout the country heard about Florida, how to get here and what was available. The state was responsible for administering research projects to acquire accurate information regarding the leisure-recreation industry. They, in turn, relied on the state's industry leaders to provide them with accurate statistics and other vital information.

Based on this new broad base of support, the state allocated \$300,000 for advertising in key northern cities. The first campaign boasted that the state had gasoline and urged tourists to drive on down. Many of the tourists that did, found that the state had miscalculated and that many stations were closed or rationing. Later campaigns promoted the joys of

plane or train travel and also a "tourists are nice people" campaign.¹¹⁴

In Central Florida, Innkeeper's Associations merged and implemented a self-tax to raise funds for advertising the Orlando area to northern markets. Miami reallocated money acquired through their associations for immediate use.

At Walt Disney World, target market campaigns proved to be so successful that each year new "target" cities are added going from six in 1973-74 to twenty-six in 1976-77.¹¹⁵

The foreign market was investigated by Walt Disney World in 1973-74 with promotional tours to South America and Canada. These visits proved to be so successful that foreign tours are now scheduled all over the world each year to promote Walt Disney World and Disneyland. The Walt Disney Travel Company opened in December 1973 paid off with additional foreign attendance by summer of 1974. The travel subsidiary was very active in signing up international airlines and putting together package deals for European and Japanese tourists.¹¹⁶ Based on this study, it is clear that Walt Disney World was successful in distinguishing different markets through "target" city programs and foreign tours with the Disney Ambassador and an entourage of characters familiar to those countries.

Industry officials were also advised to encourage mass carriers. The result was insignificant with increased package plans and additional trains and routes offered by AMTRAK in

January and again in April. Bus lines increased their runs and added package plans to travelers headed to Florida. Transport of New Jersey, the nations largest private mass transit bus company scheduled three different tour packages to Florida.¹¹⁹ Numerous smaller lines added special tours or one-day packages for both tourists and residents.

Airlines, in turn, made an all-out effort to fill empty seats headed to Florida. By June, Orlando's Sentinel Star reported that airlines serving Orlando had one of the best months ever heading for a record year. Eastern Airlines reported 58,691 passengers boarding at McCoy Jetport for the month. Southern Airways were 37.7 percent over June of 1973 with a 14 percent rise above average in boarding from McCoy for June 1974. Delta Airlines reported an 11 percent increase in boarding at McCoy for June and a 22 percent increase for the first six months.¹¹⁸

Even AAA offered members a series of low cost, high quality vacation packages designed to achieve maximum vacation pleasure at minimum expenditure of fuel.¹¹⁹

One final goal presented by Walt Disney World to the tourist industry was that of achieving a greater impact on tourists visiting Florida by extending the length of their visit and by increasing the size of the groups. At Walt Disney World, this effort was combined with a second effort of capturing a higher percentage of residents by encouraging repeat visits.

Statistics for the period under study indicate that by May the length of the visit by tourists to Walt Disney World increased from 2.4 to 2.8 days.¹²⁰ Group size, based on surveys taken at Walt Disney World on six different occasions denoted an increase in average group size from 3.2 to 3.6.¹²¹ The increase in group size and length of stay came despite decreased attendance. The figures reflect only an evaluation for Walt Disney World and not the state at large. Assessment of resident visitation patterns did not show any real significant differences.

Table 2 shows the effect the energy crisis had on Walt Disney Tourist Attendance in the year prior to the crisis (1972-73) and during the crisis year (1973-74).

Table 2

Walt Disney World
Tourist Attendance
(in thousands)

October to March for 1972-73 and 1973-74.

<u>TIME PERIOD</u>	<u>TOURIST GUESTS</u>			<u>%</u>
	<u>1972-73</u>	<u>1973-74</u>	<u>DIFFERENCE</u>	<u>VARIANCE</u>
OCTOBER	295	335	40	14%
NOVEMBER	320	404	84	26%
DECEMBER	631	494	(137)	(22%)
JANUARY	423	393	(30)	(7%)
FEBRUARY	603	515	(88)	(15%)
MARCH	<u>890</u>	<u>606</u>	<u>(284)</u>	<u>(32%)</u>
FIRST SIX MONTHS	<u>3,162</u>	<u>2,747</u>	<u>(415)</u>	<u>(13%)</u>

During the months of October and November, traditionally slow months following the summer periods, attendance comparisons for the first two quarters of the fiscal year 1972-73 and 1973-74 show an increase in attendance for October and November and a sharp decrease in attendance for the four months following President Nixon's announcement of an energy crisis over attendance from the same period a year ago.

Table 3 uses the same format to show the difference in the patterns of resident guests during the same period of 1972-73 and 1973-74.

Table 3

RESIDENT ATTENDANCE
(IN THOUSANDS)

October to March 1972-73 and 1973-74

<u>TIME PERIOD</u>	<u>RESIDENTS GUESTS</u>			
	<u>1972-73</u>	<u>1973-74</u>	<u>DIFFERENCE</u>	<u>VARIANCE</u> %
OCTOBER	222	157	(65)	(29%)
NOVEMBER	230	173	(57)	(25%)
DECEMBER	232	232	-	-
JANUARY	176	177	1	-
FEBRUARY	182	163	(19)	(10%)
MARCH	261	272	11	4%
FIRST SIX MONTHS	<u>1,303</u>	<u>1,174</u>	<u>(129)</u>	<u>(10%)</u>

The most significant difference here comes in seeing that resident attendance for October and November of 1973, was down significantly from the same months in 1972. The decrease in resident attendance cannot be attributed to the energy crisis as the oil shortages did not begin until late November. At the same time, statistics for the months of December and January of both years show no significant difference even after the energy announcements. While February statistics dropped for 1974 as compared to 1973, resident attendance in March showed a significant increase over the previous - a fact that might be attributable to the increased advertising aimed at the resident population.

An increase in resident visitation was most successful when special events or big openings were advertised (see Appendix E). Television and radio advertisements proved to be an excellent technique that did have a strong effect on motivating residents and tourists already in the area to visit or re-visit Walt Disney World. However, this increase was not as significant as was expected.

One note that should be added is that Walt Disney World was not able to bring about the changes and the actions alone. It seems probable, however, that Disney as a leader in the tourist industry in Florida, was able to add a strong impetus. Possibly, the most notable achievement of Walt Disney World was their effort to pull the industry together as a whole to provide

a unified front for the effort, something that had not occurred for more than 25 years.

In conclusion, it seems evident that Walt Disney World was successful in bringing some form of positive action with a majority of it's recommendations both internally and as part of the industry as a whole. Walt Disney World was successful in communicating the need for a unified effort on the part of the tourist industry. The industry, in turn, was successful in urging the Florida State Department of Tourism to get involved and in influencing national policy making on energy during the crisis period. The tourist industry and the state began active communication campaigns to draw Northern tourists South to different areas within the state. The degree of success is difficult to ascertain for the period of study but in terms of long range influence, the campaign effort can be judged as successful with tourism in the state setting new records each year since the crisis period.

The end of the oil embargo in March made it difficult to assess the degree of success or failure of certain efforts. Tourism did increase significantly after March but the cause of this increase is difficult to determine. Was it simply the end of the energy crisis or did the efforts of the tourist industry over the period of November, 1973 to March, 1974 have any bearing on the increased growth of tourism?

In assessing Walt Disney World's success or failure in a major communication effort these factors become evident. Following the December meeting of the Subcommittee on Tourism, the tourist industry was forced to consider a number of alternatives and proposals. As a result, the tourist industry began working together and more importantly began to take a better look at it's capabilities and limitations, energy saving possibilities for the future and new markets here and abroad. Industries, like mass carriers, dependent on tourism, were encouraged to evaluate their capabilities and to find their own survival as well as that of the facilities they served. The State of Florida and it's residents were forced to realize the importance of tourism to it's economy.

Based on the research it seems evident that Walt Disney World was successful in identifying the problems facing tourism and equally successful in identifying possible solutions. They played a significant part in designing tools to communicate this information to the tourist industry, state government officials and the public in general. Beyond communicating this information, Walt Disney World played a major role in leading the way by employing the techniques it recommended in it's own internal communication efforts. The communication techniques and tools utilized by Walt Disney World were varied and ran the range from informal informational programs on energy efficiency to broad informational programs to potential visitors in the United States

and the world through the "target" market campaigns, informational films for TV and rack services. The success of these programs was difficult to assess over the period of a few months. However, in evaluating many of these programs three years later the degree of success is significant.

The use of communication as a vehicle to combat an economic problem, should have tremendous influence on the tourist industry in the future. During the period of the energy crisis, the industry learned a valuable lesson in the power of communication in its multiple means of reaching and motivating people to act whether it be a state or national government decision maker, a tourist in New York or New Jersey, a family in a foreign country, an employee, or a member of the tourist industry. These individuals can be influenced to act on whatever information they might receive. The best communicator will reach and motivate the greatest number of people in the effort to be successful in whatever venture being pursued.

APPENDIX A

A Report From Motorists Traveling by Automobile
to Vacation in Florida

Detailed Tables

"Back home before you left for Florida, were you having a lot of trouble getting gas, a little trouble getting gas, or not much trouble getting gas?"

1. A lot of trouble - 17%
2. A little trouble - 25%
3. Not much trouble - 53%

(ASK OF THOSE WHO SAY "A LOT OF TROUBLE")

"Because of your difficulty in getting gas at home, did you give serious consideration, a little consideration or almost no consideration to postponing or cancelling this vacation trip to Florida?"

1. Serious consideration - 6%
2. Little consideration - 5%
3. Almost no consideration - 5%

"On your drive down here to Florida, did you have a great deal of trouble getting gas, some trouble getting gas, almost no trouble getting gas?"

1. Great deal of trouble - 18%
2. Some trouble - 30%
3. Almost no trouble - 18%
4. No trouble at all - 30%

"On your drive down here to Florida, did you have more trouble than you expected getting gas, about as much trouble as you expected in getting gas, less trouble than you expected getting gas?"

1. More than expected - 19%
2. About as much as expected - 26%
3. Less trouble than expected - 27%
4. No trouble - 24%

"Approximately, what is the average cost you pay per gallon for gas back home?"

1. 51c / gallon - average

"Thinking back on your trip here, what was the approximate average cost per gallon you paid for gasoline?"

1. 62c / gallon - average

"Did you pay more per gallon for gasoline getting here than you expected, did you pay about as much as you expected for your trip here, or did you pay less than expected?"

1. More than expected - 8%
2. About as much as expected - 69%
3. Less than expected - 15%

(FOR THOSE WHO "PAID MORE THAN EXPECTED")

"Will the unexpected increase in the cost of gasoline to Florida affect the money you budgeted for this trip a lot, a little or not at all?"

1. For a lot - 1%
2. For a little - 3%
3. For not at all - 3%

"Do you expect to have a lot of difficulty, some difficulty or a little difficulty in getting gas where you will be staying?"

1. A lot - 24%
2. A little - 26%
3. None - 16%
4. Don't know - 30%

"Do you expect to pay more, about the same or less per gallon for gas than what you paid on the average driving to Florida?"

1. More - 21%
2. Less - 7%
3. About the same - 36%
4. Don't know - 32%

"Is this your first trip to Florida?"

1. Yes - 13%
2. No - 83%

(IF ANSWER IS "NO"):

"Did you leave any sooner this year to come to Florida?"

1. Yes - 9%
2. No - 72%

(IF ANSWER IS "YES"):

"The problem of getting gas influenced my decision to come earlier to Florida a lot, a little or not very much at all."

1. A lot - 4%
2. A little - 6%
3. Not at all - 3%

"Do you think that the newspapers, radio and television are dealing with the energy crisis and the gasoline shortage fairly and accurately or not?"

1. Yes - 33%
2. No - 54%
3. Don't know - 13%

"Did what you see, read or hear in the newspapers, radio and television affect your decision to vacation in Florida a lot, a little or not very much?"

1. A lot - 14%
2. A little - 29%
3. Not very much - 53%

"Did what you see, read or hear in the newspapers, radio and television affect your decision to drive to Florida a lot, a little or not very much?"

1. A lot - 9%
2. A little - 25%
3. Not very much - 62%

"In planning this trip to Florida, did you consider any other types of transportation?"

1. Yes - 35%
2. No - 59%
3. Don't know - 6%

(IF YES):

Airplane - 27%; Bus - 3%; Train - 5%

(IF YES):

"About how much money do you think that type of transportation would cost you and your party in total dollars?"

---DON'T KNOW - 68%---

"Was cost the main reason you decided to drive?"

1. Yes - 27%
2. No - 68%

"Do you think the gas shortage problems are more real than imagined or more imagined than real?"

1. More real than imagined - 40%
2. More imagined than real - 50%
3. Don't know - 8%

"Do you think the energy crisis and gas shortages will last many years, about a year or so or be over shortly?"

1. Many years - 29%
2. A year - 30%
3. Over shortly - 33%
4. Don't know - 8%

"Do you think the price of a gallon of gas at the end of the next three months will be higher, about the same, or lower?"

1. Higher - 73%
2. About the same - 16%
3. Lower - 6%
4. Don't know - 5%

"Do you think there will be gas rationing in the near future?"

1. Yes - 29%
2. No - 65%
3. Don't know - 6%

(IF YES):

"Which will hurt you more:" The high cost of gasoline or the rationing of gas or both?"

1. High cost of gas - 8%
2. Rationing of gas - 14%
3. Both - 7%

"Thinking about your next door neighbors, do you think the difficulty in obtaining gas will change or curtail their vacation plans this year?"

1. Yes - 59%
2. No - 33%
3. Don't know - 8%

"Did you consider any other vacation place besides Florida for this trip?"

1. Yes - 15%
2. No - 79%

(IF YES):

"Was the possibility of not being able to get enough gas the reason you considered some other vacation place?"

1. Yes - 7%
2. No - 8%

"If gas rationing had been enforced a month ago, would you have saved up your gas coupons so that you could get to Florida?"

1. Yes - 41%
2. No - 51%
3. Don't know - 8%

"Thinking about your return trip home and comparing it to your trip here, do you think gas will be easier to get, harder to get or about the same?"

1. Easier - 23%
2. Harder - 16%
3. About the same - 47%
4. Don't know - 7%

"Do you think the price of gas when you get back home will be higher, about the same or lower than when you left your home?"

1. Higher - 38%
2. About the same - 48%
3. Less - 1%
4. Don't know - 6%

APPENDIX B

Florida Resident and Tourist Population by County
January to March, 1973

	<u>January</u>	<u>February</u>	<u>March</u>
Dade	2,237,000	2,243,000	2,215,000
Broward	858,000	866,000	963,000
Pinellas	820,000	837,000	956,000
Duval	685,000	690,000	718,000
Hillsborough	655,000	673,000	720,000
Palm Beach	455,000	458,000	475,000
Polk	279,000	285,000	293,000
Brevard	276,000	280,000	305,000
Volusia	246,000	292,000	435,000
Sarasota	195,000	199,000	234,000
Manatee	145,000	143,000	154,000

APPENDIX C

Major Cities Within Florida Counties

Brevard - Titusville, Melbourne, Cocoa
Broward - Fort Lauderdale, Hollywood
Dade - Miami, Coral Gables
Duval - Jacksonville
Hillsborough - Tampa
Manatee - Bradenton, Palmetto
Palm Beach - West Palm Beach, Boca Raton
Pinellas - St. Petersburg, Clearwater
Polk - Lakeland, Winter Haven
Sarasota - Sarasota, Venice
Volusia - Daytona Beach, Ormond Beach, New Smyrna

APPENDIX D

Major Florida Cities Grouped by Television Network Stations

- I. Tampa, St. Petersburg, Bradenton, Venice, Sarasota
Lakeland, Winter Haven, Palmetto, Clearwater
- II. Miami, Fort Lauderdale, Coral Gables, Hollywood
- III. West Palm Beach, Fort Pierce, Vero Beach, Boca Raton
- IV. Jacksonville
- V. Orlando, Daytona Beach, New Smyrna, Cocoa, Ormond Beach,
Titusville, Melbourne

APPENDIX E

Walt Disney World
Valentine's Day Party Survey
February 8, 1974

Number Surveyed (Sample)	..	..	..	..	689
Attendance (Population)	..	..	..	..	17,538
Sample Size	..	..	..	..	3.9%

Survey Objective: Evaluate the revenue generated by this private party vs. the promotional and entertainment expenses. Determine if this visit takes the place of a future visit.

Survey Results: The Valentine's Day Party produced a net contribution of \$62,022. 93% of those surveyed said this visit did not take the place of a future visit. Radio advertising prompted 65% of the visitors to the Valentine Party.

WALT DISNEY WORLD
VALENTINE'S DAY PARTY
FINANCIAL RESULTS
February 8, 1974

ATTENDANCE	17,538	
SALES		
Admissions		
Advance	\$83,043	
Gate	-0-	
Employee	<u>14,524</u>	
Total Admissions		\$97,567
Food		18,715
Merchandise		<u>15,291</u>
Sub-Total		131,573
Less 2.4% of Sales in Lieu of another visit		<u>(3,158)</u>
TOTAL SALES		<u>\$128,415</u>
EXPENSES		
Cost of Sales		
Food	5,891	
Merchandise	<u>7,462</u>	
		13,353
Labor		
Food	4,158	
Operations	3,148	
Merchandise	2,523	
Security	640	
Custodial	<u>945</u>	
		11,414

Advertising	10,500
Commissions	7,017
Decorations	2,373
Entertainment	19,776
Other	<u>1,960</u>
TOTAL EXPENSES	<u>\$66,393</u>
NET CONTRIBUTION	<u>\$62,022</u>
NET CONTRIBUTION AS % OF REVENUE	48.3%



WALT DISNEY WORLD VALENTINE PARTY GUEST SURVEY

FRIDAY, FEBRUARY 8, 1974

Paid Attendance 17, 538

Total Surveyed - 689 Sample Size - 3.9%

						<u>TOTAL SURVEY</u>	
	<u>TELEVISION</u>	<u>NEWSPAPER</u>	<u>FRIENDS</u>	<u>OTHER</u>	<u>RADIO</u>	<u>NUMBER</u>	<u>PERCENT</u>
AVERAGE GROUP SIZE	3.7	2.9	3.4	3.1	3.8	3.7	
AGE GROUPS							
0 - 11	-	2	2	2	7	13	1.9
12 - 14	4	4	-	4	16	28	4.1
15 - 17	3	4	8	1	73	89	12.9
18 - 21	8	4	60	26	216	314	45.6
22 - 25	8	-	9	6	80	103	14.9
26 - 34	6	13	15	1	35	70	10.2
35 - 44	4	2	3	14	29	52	7.5
OVER 44	-	-	-	2	6	8	1.2
NO RESPONSE	4	-	-	-	8	12	1.7
TOTAL						<u>689</u>	<u>100.0</u>
FIRST TO WALT DISNEY WORLD?							
YES	3	1	5	10	16	35	16.7
REPEAT VISITOR	9	9	26	9	118	171	81.8
NO RESPONSE	-	-	-	-	3	3	1.5
TOTAL						<u>209</u>	<u>100.0</u>
DO YOU THINK YOUR VISIT TONIGHT WILL TAKE THE PLACE OF A FUTURE VISIT?							
YES	1	-	-	-	4	5	2.4
NO	7	9	28	17	129	190	92.7
NO RESPONSE	2	1	3	-	4	10	4.9
TOTAL						<u>205</u>	<u>100.0</u>

	<u>TELEVISION</u>	<u>NEWSPAPER</u>	<u>FRIENDS</u>	<u>OTHER</u>	<u>RADIO</u>	<u>TOTAL SURVEY</u>	
						<u>NUMBER</u>	<u>PERCENT</u>
HOW DID YOU HEAR ABOUT TONIGHT'S ENTERTAINMENT?							
NUMBER	15	14	31	17	145*	222	
PERCENT	6.8	6.3	13.9	7.7	65.3*	<u>100.0</u>	
PLAN TO REVISIT							
TOMORROW	-	-	2	3	3	8	3.9
WITHIN ONE MONTH	-	1	3	3	15	22	10.8
1 TO 3 MONTHS	1	4	13	2	52	72	35.5
3 TO 6 MONTHS	2	-	6	1	23	32	15.8
6 MONTHS TO 1 YEAR	4	3	3	1	9	20	9.9
1 TO 2 YEARS	1	1	-	-	5	7	3.4
NEXT SPECIAL EVENT	-	-	-	1	1	2	1.0
NOT SURE	2	1	3	7	27	40	19.7
TOTAL						<u>203</u>	<u>100.0</u>

*Radio Stations

FOOTNOTES

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²"Mideast Oil Stops Flowing - and U.S. Feels First Pinch," U.S. News and World Report, November 19, 1973, p. 27.

³"Special Energy Message," op. cit., p. 17.

⁴"Nixon's Blueprint for Meeting Energy Crisis," U.S. News and World Report, November 19, 1973, p. 116.

⁵"Mideast Oil Stops Flowing," op. cit., p. 29.

⁶Ibid.

⁷"Energy Crunch - Who'll Get Hurt," U.S. News and World Report, November 26, 1973, p. 18.

⁸"Mideast Oil Stops Flowing," op. cit., p. 28.

⁹"Special Energy Message," op. cit., p. 19.

¹⁰"Fuel Crisis Deepens," U.S. News and World Report, December 3, 1973, p. 23.

¹¹William C. Harsh, Jr., "Florida's Tourism Industry Hopeful," Sun Times [Florida], December 24, 1973, p. 6.

¹²"Film Rentals Excel Parks in 1973 Fiscalities for Disney," Variety, January 16, 1974, p. 24.

¹³Harsh, loc. cit.

¹⁴Ibid.

¹⁵Tampa [Florida] Tribune, January 5, 1974, p. 8, col. 5-6.

¹⁶Ibid.

¹⁷Ibid.

¹⁸Ibid.

¹⁹Ibid

²⁰Harsh, loc. cit.

²¹St. Petersburg [Florida] Times, January 11, 1974, p. 6,
col. 3.

²²Harsh, loc. cit.

²³Pioneer [Big Rapids, Michigan], December 6, 1973, p. 7,
col. 5.

²⁴Ibid.

²⁵Tampa [Florida] Tribune, January 27, 1974, p. 8, col. 4-5.

²⁶Ibid.

²⁷Kissimmee [Florida] Enterprise, January 17, 1974, p. 4,
col. 3.

²⁸The Night [San Antonio, Texas], January 4, 1974, p. 11,
col. 5.

²⁹"Florida Tourism Interests Mount Effort Against More Fuel
Conservation Measures," Travel Agent, December 20, 1973, p. 16.

³⁰Ibid.

³¹Sentinel Star [Orlando, Florida], January 11, 1974, p. 7B,
col. 3-5.

³²The Cleveland [Ohio] Press, January 11, 1974, p. 6,
col. 2.

³³Opinion expressed by Robert Allen, Vice President - Walt
Disney World in a speech ("Implications of the Energy Crisis on
Florida Tourism") before the Subcommittee on Tourism and
Commercial Development, Florida House of Representatives,
Tallahassee, Florida, December 10, 1973.

³⁴Ibid.

³⁵Ibid.

³⁶Statement by Robert Allen, Vice-President Resorts, Walt Disney World, in a personal interview, Lake Buena Vista, Florida, January 24, 1974.

³⁷Travel Agent, loc. cit.

³⁸Ibid.

³⁹Sentinel Star [Orlando, Florida], January 11, 1974, p. 60, col. 3.

⁴⁰Ibid.

⁴¹Ibid.

⁴²Ibid.

⁴³News Chief [Winter Haven, Florida], January 14, 1974, p. 5, col. 4.

⁴⁴Columbus [Ohio] Evening Dispatch, January 31, 1974, p. 2, col. 3-4.

⁴⁵"Florida's Tourist Shortage Still Hurts," Business Week, January 2, 1974, p. 28.

⁴⁶Ibid.

⁴⁷Ibid.

⁴⁸Booz, Allen and Hamilton, Inc., "Sensitivity of the Leisure-Recreational Industry to the Energy Crisis," (Washington D.C.: Federal Energy Office, January 18, 1974).

⁴⁹Ft. Lauderdale [Florida] News, December 23, 1973, p. 12, col. 3-6.

⁵⁰Allen, Subcommittee Report, loc. cit.

⁵¹Sentinel Star [Orlando, Florida], January 1, 1974, p. 8A, col. 1.

⁵²Ibid.

⁵³Ibid.

⁵⁴Ibid.

⁵⁵Business Week, Loc. cit.

⁵⁶Statement by Rod Caborn, Manager Marketing, Walt Disney World, in a personal interview, April 29, 1974.

⁵⁷"Walt Disney World Literature - And It's Distribution" (Lake Buena Vista, Florida: Marketing Department for Walt Disney World, April 19, 1974).

⁵⁸"Walt Disney World's Unique Participation Program Provides Showcase for American Business" (Lake Buena Vista, Florida: Publicity Department of Walt Disney World, April 1974).

⁵⁹Statement by Paul Auger, Manager for Disney Marketing with Eastern Airlines, in a personal interview, April 30, 1974.

⁶⁰Caborn, op. cit.

⁶¹Ibid.

⁶²Ibid.

⁶³Sunday News [New York], February 3, 1974, p. 14F, col. 6-7.

⁶⁴Wall Street Journal [New York], January 2, 1974, p. 12F, col. 2.

⁶⁵Ibid.

⁶⁶Tampa [Florida] Tribune, January 12, 1974, p. 4B, col. 3-4.

⁶⁷Ibid.

⁶⁸Columbus Evening Dispatch, loc. cit.

⁶⁹Ibid.

⁷⁰Booz, op. cit., p. 16.

⁷¹Ibid.

⁷²Wall Street Journal, loc. cit.

⁷³Ibid.

⁷⁴Indianapolis [Indiana] Star, January 20, 1974, p. 3, col. 3-5.

⁷⁵Ibid.

⁷⁶News Chief [Winter Haven, Florida], January 17, 1974, p. 2, col. 2-3.

⁷⁷"Optimistic Future Painted for Disney," Amusement Business, January 5, 1974.

⁷⁸Sunday News [New York], January 20, 1974, p. 15H, col. 3-4.

⁷⁹Ft. Lauderdale News, loc. cit.

⁸⁰"Take Bus Tour to Disney World - Save Gas, Have Fun", Suncoast Motorist, February, 1974, p. 4.

⁸¹St. Petersburg [Florida] Times, January 13, 1974, p. 8, col. 1-2.

⁸²Business Week, loc. cit.

⁸³Statement by Bill Bieberbach, Manager Research and Statistics, Walt Disney World, in a personal interview, February 18, 1974.

⁸⁴"A Report From Motorists Traveling by Automobile to Vacation in Florida" (Tallahassee, Florida: Division of Tourism, Department of Commerce, March 1974).

⁸⁵The El Paso [Texas] Times, January 31, 1974, p. 5, col. 1-2.

⁸⁶"Walt Disney World Literature", op. cit., p. 3.

⁸⁷Ibid.

⁸⁸Ibid.

⁸⁹Ibid.

⁹⁰Ibid.

⁹¹Ibid.

⁹²Ibid.

⁹³Ibid.

⁹⁴Ibid.

⁹⁵"Florida Resident and Tourist Study" (Lake Buena Vista, Florida: Marketing Department Walt Disney World, January 1974).

⁹⁶Caborn interview, op. cit.

⁹⁷Rocky Mountain [Colorado] News "Startime", December 23, 1973, p. 4, col. 3-4.

⁹⁸The Hartford [Connecticut] Courant, January 6, 1974, p. 6, col. 2.

⁹⁹Today [Chicago], January 9, 1974, p. 5F, col. 3-4.

¹⁰⁰Leesburg [Florida] Commercial, January 9, 1974, p. 2, col. 3-4.

¹⁰¹Monday Paper [Boca Raton, Florida], January 28, 1974, p. 4, col. 6.

¹⁰²Polk County Democrat [Bartow, Florida], January 28, 1974, p. 3, col. 3-4.

¹⁰³Halifax Reporter [Ormond Beach, Florida], January 28, 1974, p. 5, col. 6-7.

¹⁰⁴"Walt Disney World Valentine's Day Party Survey" (Lake Buena Vista, Florida: Research and Statistics Department, Walt Disney World, February 8, 1974).

¹⁰⁵Caborn interview, op. cit.

¹⁰⁶New York Times, March 22, 1974, p. 8F, col. 2.

¹⁰⁷The Atlanta Constitution, May 19, 1974, p. 8D, col. 4-5.

¹⁰⁸Ibid.

¹⁰⁹Chicago Daily News, May 11, 1974, p. 7B, col. 1-2.

¹¹⁰Today [Cocoa, Florida], May 1, 1974, p. 8, col. 2-3.

¹¹¹"How Soaring Cost of Energy Spurs New Ways to Save," U.S. News and World Report, May 27, 1974, p. 27.

¹¹²Ibid.

¹¹³Ibid.

¹¹⁴New York Times, loc. cit.

¹¹⁵Statement by Tom Elrod, Director Marketing, Walt Disney World, in a personal interview, November, 1976.

¹¹⁶Sentinel Star [Orlando, Florida], May 5, 1974, p. 4D, col. 1-2.

¹¹⁷The Denver [Colorado] Post, April 21, 1974, p. 6C, col. 1-3.

¹¹⁸Sentinel Star [Orlando, Florida], July 17, 1974, p. 2B, col. 2-3.

¹¹⁹Washington Star News, May 30, 1974, p. 8E, col. 1-2.

¹²⁰Chicago Daily News, loc. cit.

¹²¹"Walt Disney World Executive Committee Presentation and Opinion Polls for the First Six Months Fiscal Year 1974" (Lake Buena Vista, Florida: Research and Statistics Department Walt Disney World, May 2, 1974).

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