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**PERFORMING ARTS
FACILITY REQUIREMENTS
AT WALT DISNEY WORLD**

Orlando, Florida

November 8, 1985

Prepared by:

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November 8, 1985

Mr. Richard Benz
Vice President
Disney Development Company
1675 Buena Vista Drive
Lake Buena Vista, Florida 32830

Dear Dick:

It was a pleasure to participate in your mini-charrette of last Friday (November 1, 1985) to discuss Ashland and Chautauqua concepts and their implications on performing arts facility requirements at Disney World.

Our topic in the charrette was to deal with the idea of Chautauqua, New York and Ashland, Oregon as a frame of reference for new products at Walt Disney World and to see if these ideas and their implicit objective of adding performing arts venues to Disney World, classic, light classic and popular in some combination, is a good one--a highly visible, on target idea.

Our thrust there was to determine if it is a sound idea and talk about how to do it.

Some of the tentative conclusions that I would draw from the discussion and our own perspectives are expressed in the following paragraphs.

Chautauqua, New York

Chautauqua does for the mind and spirit what Pritikin does for cholesterol and blood pressure. It offers seminars, lectures, religious inquiry (strong in the South), performances in all kinds of music in a relaxed, laid back ambience--simple but good accommodations with a Victorian look--all kinds of outdoor recreation. It has a load of history in the setting. People travel long distances to get there--over 100,000 stay a long time each season. The artsy side of its program appeals to about 5 to 10 percent of the population, while the more popular side attracts a greater market--three times that number. In general, it appeals to above average educated people with a relatively higher income--like many who come to Florida.

Ashland, Oregon

Ashland is primarily attractive to the serious drama buff and the Shakespeare addict who are a minority in the population,

about 8 percent attendance to total population and less when adjusted for repeaters. The concept can be popularized to broaden the appeal. The Renaissance theme has great popularity in many formats and could indeed be applied to a new hotel at WDW (Renaissance fairs around the country generate a good 2 million attendance). People go a long way to get to Ashland and attendance is over 300,000 and growing.

Market Support Discussion

Given the right concept the market for the Chautauqua and Renaissance projects will, in my opinion, be shown to be big enough and of high enough quality to be of material benefit to Walt Disney World's overall entertainment offering.

The makeup of the available market is as follows:

- 3.5 million visitors in Orlando hotels
- 8 million visitors in the two parks with a median \$38,000 income.
- 800,000 plus population in greater Orlando.
- Two new 400-room themed hotels of the type discussed would generate over 1/2 million person nights on the spot and should provide penetrations for these attractions at a higher value than the population as a whole.

There are regularly 50,000 plus visitors, in hotels right around Disney World and their nighttime options run thin after a couple of days. For some people, arts venues would come as a welcome relief. Furthermore, they are by nature a captive audience.

Operational Support Factors

As shown above, Central Florida is a destination market of awesome size and momentum, and steering a portion of it to performing arts venues should be enhanced by inherent strengths in the Disney organization, for example:

- Disney, like MCA at its amphitheater, is no greenhorn in the impresario role. The company has the background to develop an effective booking calendar of the types desired. Disney could do a better job of mixing long and short hair venues (better than MCA).
- Both concepts can be adapted to less costly hotel construction without loss of entertainment value, compared to deluxe high rise, and we believe that a lower cost hotel product on-site is needed.

- These concepts could draw people into the WDW orbit who bypass it now in favor of resort, sports and other recreation action.
- Disney's serious interest in Performing Arts is not new. Fantasia broke new ground in disseminating serious music to a larger audience. Walt taught people how to enjoy Bach and Stravinsky.
- Likewise, CalArts, a Disney creation, was paramount to Walt's perception of priorities. He believed it would add breadth, scope, imagination and artistic quality to the world of Disney. Walt thought that a multi-arts, multi-discipline approach in arts education would broaden his artists. He complained about their narrowness and over-specialization. He wanted to create a school that would add a Renaissance character to his artists and others and be the most important place of its kind anywhere. It was not easy but today CalArts is a worldwide leader in computer music, cinematography, animation, modern dance, modern art, drama and music. Its students generate more prizes per capita than any other arts education institution.

The point is that an organization that could evolve CalArts certainly should have the capacity to tap the performing arts interests of a segment of the huge captive market at Orlando. CalArts may be a small item in the total range of Disney operations but its cutting edge reputation contributes greatly to the Disney tradition of innovation. Also its visibility is out of proportion to its dollar size, a kind of leverage Michael Eisner addressed in his memo on Chautauqua and Ashland and their applicability to Disney World development options.

Conclusion

Sculpturing this suggested program so that it is the right one is a tricky mission. The serious side of music and performance around the country generally generates revenues 50 percent to 75 percent of costs. To beat that hard reality Disney World has advantages of a long season, the opportunity and ability to mix popular and high arts programs, a captive market of substantial size and substantial know-how in the field. Further, because of the huge market turnover, productions could run longer at WDW and therefore they could be amortized over a longer period of time.

There are several options for placing performing arts facilities within Disney World. They can be included within the format of new themed hotels as has been suggested. They can be placed in their own free-standing environment as a magnet for all visitors to Disney World and its hotel complex. In either case they will be offered as a new entertainment option for all visitors and residents in the area.

Future Action

Considerable work needs to be done to define the right program. I believe that we could assist you in that process by undertaking a research and consulting program which would supply some or all of the following information:

1. Market Measurement
 - A. Resident market
 - B. Destination tourism in the Orlando area
 - C. Seasonality, repeat rates, length of stay
 - D. Party size, income and other demographics
2. Audit of the Orlando Performing Arts Scene
 - A. Commercially available facilities and events calendar
 - B. Attendance
 - C. Source of attendance
3. Use Days, Bookings and Attendance and Other Operational Data At Related Amphitheater Attractions
 - A. Pacific Amphitheater
 - B. Irvine Meadows
 - C. Universal Amphitheater
 - D. Cal Expo
 - E. Greek Theater (Berkeley and L.A.)
 - F. Concord Pavilion
 - G. Saratoga
 - H. Chautauqua
 - I. Ability to draw - tourists versus residents
4. Use Days, Bookings and Attendance Data at Related Theater and Festival Venues
 - A. Ashland, Oregon
 - B. Ontario
 - C. Globe, San Diego
 - D. Aspen
 - E. Spoleto
 - F. Wolf Trap
 - G. Tanglewood
 - H. Ability to draw, tourists versus residents
5. Recommended Performance Event Calendars
6. Recommended Facility Configurations
 - A. Seating capacity and format
 - B. Shell size, site size
 - C. Stage size and equipment, proscenium, pit, fly gallery, etc.

- D. Television, lighting, sound, rehearsal space, dressing rooms, etc.
- E. Amenity requirements (food and beverage space, merchandising opportunities, rest rooms, etc.)
- F. Development cost parameters

7. Operating Parameters

- A. Revenues
- B. Costs

8. Site Evaluation

- A. Access intra-WDW and regional
- B. Synergistic relationships on WDW site
- C. Public transport
- D. Access to parking
- E. Environmental considerations
- F. Exposure
- G. Expansability

Our qualifications in this kind of work as outlined in my letter to you of October 28, 1985 are enclosed. The field in general is one of our prime specialties and has been since 1951. We do as much or more work in this field as anyone in the business. In addition to my own involvement, several of our staff are well versed in this field, Nick Winslow, Sharon Dalrymple and Bill Stevenson, in particular.

We believe that a specific and comprehensive research effort attacking the points in the above outline can be put together for the following budget:

Senior Staff Time - 60 days	\$48,000
Travel Expense and Report Preparation	<u>7,000</u>
Total	\$55,000

Let me know how you want to proceed.

Very best regards,

Harrison A. Price
Chairman

HAP:su

Enclosure