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Memorandum Report: The Outlook for Themed Recreation Attractions at Bergen OP Zoom

Harrison Price Company

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MEMORANDUM REPORT

THE OUTLOOK FOR THEMED RECREATION ATTRACTIONS AT BERGEN OP ZOOM

Prepared for:

VVV, Breda, Holland

September 1, 1982

Prepared by:

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SECTION 1
INTRODUCTION

At the request of VVV of Breda, Holland, through the offices of Mr. Joop Strijkers of The Hague, Harrison Price Company was requested to visit the city of Bergen Op Zoom in the province of North Brabant to make a preliminary examination of its potential as a site for major themed recreation projects. A specific site known as the Molenplaat on the waterfront on the west edge of the city was to be inspected and evaluated as a specific location for such projects.

HPC has evaluated recreation potentials in The Netherlands before and observations herein are based on that prior work, recent field examination of existing commercial recreation projects and a visit to the city of Bergen Op Zoom. Findings of the assignment were presented orally September 1, 1982 to his excellency the Burgemeister of Bergen Op Zoom, Drs. P. Zevenbergen, the planning director of the City lr. J. J. de Waal Malifijt and Mssrs. Horsten, Jansen and Zanfliet representing VVV of Breda by Harrison Price, President of Harrison Price Company. This memorandum summarizes that oral presentation.

The specific assistance of Mr. Harold Zanfliet, a senior student of The Netherlands Tourism Institute in the assembly of data and field visits is acknowledged with gratitude.

This report is organized in four sections; (1) the introduction, (2) the commercial recreation market in The Netherlands, (3) the nature of the competition, and (4) opportunities for themed commercial recreation projects in Bergen Op Zoom.
Harrison Price Company staff members have studied the market for a major theme park in The Netherlands three times—first, in 1973, then in 1976 and more recently in a critique of the 1976 ERA study performed in 1981. That body of information indicates that within Holland's borders, the resident market by itself is presently some 14.1 million population and its center of gravity is computed to be about 12 kilometers east and 8 kilometers south of the city of Utrecht. If the resident market is defined more appropriately as a 150-kilometer ring centered in Holland and containing the largest total population, the center of gravity within this maximum ring moves south and east into North Brabant somewhere between Veghel and Uden. That maximum ring picks up Brussels to the south and Cologne, Essen and Duesseldorf to the southeast and contains about 24 million people. It is the true maximum resident market centered within Holland and crossing over national boundaries.

To determine what is the best practical location relative to this center point from the standpoint of maximum access, it is necessary to look at freeway movements and locations. These freeway realities cause the optimum central location to move west within an oval area looped around the triangle formed by the cities of Breda and Eindhoven on the south and the freeway intersection in Nieuwegein just south of Utrecht. This triangular structure provides access to an optimum area. It is closer to local Dutch population centers and it is bounded on its two north/south legs and its southern leg by strategic freeways. On the left leg of the triangle is the Amsterdam-Breda-Brussels freeway, on the right leg is the due south route Amsterdam-Eindhoven-Liege. The bottom leg runs east and west right into the Ruhr via Eindhoven and Duesseldorf. The oval area described serves a big market; 24 million local people in a 150-kilometer ring (see Figure 1).
Figure 1
RESIDENT MARKET CENTERS WITHIN HOLLAND

SOURCE: INFORMATION AND DOCUMENTATION CENTER FOR THE GEOGRAPHY OF THE NETHERLANDS AND HARRISONS PUBLISHING COMPANY
The east/west movement within this oval is most favorable. It consists of three major cross country routes; Utrecht-Arnhem, Rotterdam-Nijmegen and Breda-Duesseldorf.

The point of this exercise is to compare this maximum population containment ring to a similar 150-kilometer ring around Bergen Op Zoom. In it there is a loss of approximately 5 million population in the resident market (minus 7 million in the Ruhr against a gain of some 2 million in Belgium). Thus the total resident market for Bergen Op Zoom is approximately 19 million. This compares very favorably to 1978 resident markets in these cities:

1. Atlanta 8.4 million
2. Houston 6.2 million
3. St. Louis 5.4 million
4. Dallas/Fort Worth 5.2 million
5. New Orleans 4.6 million

In regard to centrality of access, there is a tangible loss. Unlike the area in the maximum oval, Bergen Op Zoom is not on the main roads south from Amsterdam and Rotterdam. The east/west access is excellent into the Ruhr, but the location is to one side.

Tourism is difficult to measure in Holland because of mixed data. Available data concerns foreign visitors staying in hotels, camping facilities, pensions and youth hostels which is about 3 million, but this excludes unrecorded visits by persons from beyond the 150-kilometer range and it includes foreigners who are already counted in the resident market. HPC wrote the following statement in its 1981 report:

"In our opinion, hotel and facility registrants are but a fraction of Netherlands tourism. In our estimation subject to eventual refinement, at least 5 to 6 million tourists float through the Netherlands excluding Belgium and Ruhr residents already counted in the 150-kilometer resident ring. Many stay with friends or they are day visitors or are simply unrecorded."
Thus, the total market for a park located in the maximum oval in The Netherlands is about 29 million. In the 150-kilometer ring around Bergen Op Zoom, the total market is approximately 24 million.

This compares very favorably to 1978 total markets (residents plus tourists) in these cities of the U.S.:

<table>
<thead>
<tr>
<th>City</th>
<th>Market Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta</td>
<td>14.4 million</td>
</tr>
<tr>
<td>New Orleans</td>
<td>11.2 million</td>
</tr>
<tr>
<td>Houston</td>
<td>8.1 million</td>
</tr>
<tr>
<td>Dallas/Fort Worth</td>
<td>7.7 million</td>
</tr>
</tbody>
</table>

In addition to its large size, it is a high quality market; average family and per capita income is comparable to that in the U.S. The same is true of neighboring countries, West Germany, France and Belgium.

It is a stable family market construction with relatively less single parent families and fewer two working parent families than in the U.S. In general, it is a family market looking for things to do as a family unit—much as in the U.S. or more so.

It is a growing market—slow but steadily increasing.

It is the conclusion of the HPC staff based on our reviews of the commercial recreation market, that the market for commercial recreation in Holland is much like that of the U.S.A. In this business field, the respective cultures are more alike than different.
SECTION 3
THE COMPETITION

In terms of overall competition in the market area—a large number of zoos, sea life parks, towers, amusement parks and related enterprises are operating. The six largest—those with attendance over 1 million are:

<table>
<thead>
<tr>
<th>Park</th>
<th>Estimated 1981 Attendance (millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>De Efteling</td>
<td>1.7</td>
</tr>
<tr>
<td>Biekse Bergen</td>
<td>1.5 (combined zoo &amp; park)</td>
</tr>
<tr>
<td>Madurodam</td>
<td>1.1</td>
</tr>
<tr>
<td>Pony Park at Slagharen</td>
<td>1.0</td>
</tr>
<tr>
<td>Keukenhoff Tulip Festival</td>
<td>1.5</td>
</tr>
<tr>
<td></td>
<td>6.8</td>
</tr>
</tbody>
</table>

In addition to these parks in the Netherlands, Walibi at 1.1 million operates near Brussels and Fantasialand in Cologne generates about 1.5 million (or more).

Thus, seven parks over 1 million attendance generate 9.4 million attendees in the market place.

In the attendance range 400,000 to 1.0 million, 11 parks operate in the market area. They are:

<table>
<thead>
<tr>
<th>Park</th>
<th>City</th>
<th>Attendance (000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>De Euromast</td>
<td>Rotterdam</td>
<td>378</td>
</tr>
<tr>
<td>Adventure Park</td>
<td>Hellendorn</td>
<td>700</td>
</tr>
<tr>
<td>Het Evoluon</td>
<td>Eindhoven</td>
<td>439</td>
</tr>
<tr>
<td>De Flevohoff</td>
<td>Biddinghuizen</td>
<td>650</td>
</tr>
<tr>
<td>Madam Tussaud</td>
<td>Amsterdam</td>
<td>459</td>
</tr>
<tr>
<td>Schleveningen Pier</td>
<td>Schleveningen</td>
<td>567</td>
</tr>
<tr>
<td>Duinrell</td>
<td>Wassenar</td>
<td>730</td>
</tr>
<tr>
<td>De Bergen</td>
<td>Wanroij</td>
<td>460</td>
</tr>
<tr>
<td>Koningin Juliantoren</td>
<td>Apeldorn</td>
<td>500</td>
</tr>
<tr>
<td>Bobbiejaanland</td>
<td>Lichtaert, Belgium</td>
<td>700</td>
</tr>
<tr>
<td>Meli Park</td>
<td>Adinherke, Belgium</td>
<td>750</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6,333</td>
</tr>
</tbody>
</table>
In the smaller park category (less than 400,000 annual attendance), HPC has tabulated 10 parks as follows:

<table>
<thead>
<tr>
<th>Park</th>
<th>Attendance (000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Het Foreldorado</td>
<td>105</td>
</tr>
<tr>
<td>De Linaeshof</td>
<td>217</td>
</tr>
<tr>
<td>Miniaturstad Walcheran</td>
<td>162</td>
</tr>
<tr>
<td>Pretpark Druinenzathe</td>
<td>112</td>
</tr>
<tr>
<td>Gouden Handen</td>
<td>185</td>
</tr>
<tr>
<td>Spookjesbos Valkenburg</td>
<td>150</td>
</tr>
<tr>
<td>Tivoli Pretpark</td>
<td>205</td>
</tr>
<tr>
<td>De Valkenier</td>
<td>150</td>
</tr>
<tr>
<td>Bosbad Hoeven</td>
<td>280</td>
</tr>
<tr>
<td>De Waarbeek</td>
<td>120</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,686</strong></td>
</tr>
</tbody>
</table>

The total competitive market in this tabulation is thus:

<table>
<thead>
<tr>
<th>Group</th>
<th>Number</th>
<th>Attendance (millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Above 1 million</td>
<td>7</td>
<td>9.4</td>
</tr>
<tr>
<td>400,000 - 1 million</td>
<td>11</td>
<td>6.3</td>
</tr>
<tr>
<td>Less than 400,000</td>
<td>10</td>
<td>1.7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>28</td>
<td><strong>17.4</strong></td>
</tr>
</tbody>
</table>

The total attendance of 17.4 million compares to the total market size of 29 million in a ratio of 0.60 attendances per person which compares to 1.0 attendances per person in the total Southern California market of 31 million and 1.1 attendances per person in the Florida market of 29 million. The question follows as to whether the market in The Netherlands is underserved or whether investment levels and better weather explain the difference. Whatever the case, generating 17.4 million attendances is a well done job and it shows a responsive market. It represents gross revenues in excess of 350 million guilders. It isn't so much a case of low attendance in the market place that creates opportunity in Holland, but the quality of execution in a good part of it that defines what can be done.
The 28 parks tabulated here have a wide range in quality of execution.

We have visited seven parks starting with the Scheveningen Pier last year (a low quality tourist trap), the Tulip Festival at Keukenhoff (a spectacular attraction) and four of the larger amusement parks on this trip (a mixed bag of good qualities and something else).

The 17.4 million attendance level answers a basic question about the impact of weather. Holland is not Hawaii, but the climate doesn't stop commercial recreation. Even with an average 30-40 days of snow and many rainy days (the sunshine ratio is a low 35 percent--1,500 out of 4,380 hours), and with rain on 36 percent of days, a major attendance level is achieved. The need for weather protection is manifest and would add to attendance potentials in any recreation enterprise in this area.

Observations on selected field visits are noted below:

De Efteling (1,700,000 attendance)

- The park has an optimum market centered location at Kaatskeuvel.
- It is a gorgeous big site with beautiful gardens and landscaping in abundance and profusion and four lakes.
- The park is underdeveloped. The site is readily expandable. With two new rides (the Swing and the Python) costing 8.5 million guilders, attendance jumped from 1.287 million to 1.700 million (incremental revenue equal or greater than the investment). This tells much about this park (and the market place).
- The park is outstandingly clean. Its feeding operations are above average; merchandising effort is nominal.
It is too much involved in static presentations with fairy tale themes lacking in audioanimatronic development. In contrast, the ghosthaus shows talent in this field. It is the best ride of its kind in the market.

There is thematic confusion in the present expansion—the park has a great tradition which should be built on.

The park with its four lakes has great potential for water ride and attraction development. The present swimming pool area is an underdevelopment. The only thematic exploitation on this area is a bucolic water ride which benefits from the beauty of the grounds.

The park is taking a strong position in the youth market with its two big, high-quality rides. The Python rollercoaster is the best ride of its kind in the marketplace. The Great Swing is well done and a big draw. Under construction is a 12- to 15-million-guilder white water rapids ride. It will be the best of its kind in this market.

The transportation system is weak—the train ride does not fulfill a transportation function.

Nighttime party operation could be offered for company and institutional gatherings. Needed—a profusion of lighting, sound, music, and entertainment.

This historic enterprise was riding on its momentum, but now it has a new energy. It could become a great theme park over the years. It has great potential for higher attendance and higher per capita generation if aggressively developed.

Biekse Bergen Recreation Park (750,000 attendance)

The park is well located and centered in the market at Hilvaranbeek. It generates 750,000 attendance in the recreation park and 750,000 in the safari zoo.

The site is huge and beautiful, containing a several-hundred-acre inland recreation lake with white sand beaches. It is expandable to a great degree.

It is a clean park. Maintenance, paint, finish and detail are excellent.
• The theme is water sports. It has a limited number of attractions.

• It evidences good food and merchandising.

• It has a fine transportation system with an elephant train and gondola systems moving visitors over large distances.

• It needs music and entertainment.

• It could utilize a $5 million Wet 'N Wild slide and wave addition.

• It has a camping area. It has room for a sport-haus center concept like Het Vennenbos at Hapert which would combine well with the lake sports area.

• The operator has planted his flag by building the best "ride" within the resident market area--a 6.8 million guilder IMAX theater--a must to see. It more or less states that this park will take its place as a major contemporary recreation enterprise with an aggressive expansion program.

Bobbejaanland (700,000 attendance)

• This park is located remotely at Lichtaart south of Turnhout. It gets 700,000 attendance with not the best access.

• It is located in a big, handsome, water-oriented site, expandable--well run, clean, well painted, well maintained, good detailing.

• It is themed extensively western (with lots of western facade in Knott's Berry Farm style). County music is everywhere.

• It has three theaters--one big extravaganza revue type show which is well done and well received.

• It has 30 attractions including a space flight simulator and all are working--good stores and good restaurants. The park features the mechanical bull for rough riding.

• It has an excellent monorail transportation system circling the park.

• It has potential for craft development in the merchandise area--wood, leather, metal, ceramics, etc. It would fit in with its western street in the manner of Silver Dollar City and Spillikin's Corner at Magic Mountain in Los Angeles.
It is a better than average execution in this market place but difficult to expand its present level perhaps because it already is what it is.

It ought to have nighttime action, but its remote access works against this.

Walibi (1,100,000 attendance)

This park generates 1.1 million attendance at Wavre southeast of Brussels.

It is a dirty park in a large, ugly, poorly landscaped site. It contains two large lake areas devoid of landscaping.

It has no transportation system.

Many rides were not working--it seems to be a collection of old used rides for the most part--poorly maintained.

The park is poorly detailed and finished; for example, a shoddy entry to a fine computer show typical of the slipshod presentation.

It offers cheap merchandise and poor quality food, the worst encountered.

It offers 27 listed rides--tornado, parachute jump--the best is a 300 foot great ferris wheel. It has a weak wild river ride. Several coasters--the best is a back and forth loop called Sirroco.

It offers a tent cinemax and a poor dolphin set up and the worst dark ride around--an expensive water conveyed dark ride version of Disney's Pirates of the Caribbean, which is noisy, poorly done, pointless.

It has a good laser show sponsored by Coca Cola.

The site is expandable but management is obviously a limitation and the park is going nowhere but down unless they shake it up.

Promotion is fine (it is frequently written up in park literature), but the product is poor.

The Pier at Schleveningen (576,000 attendance)

A miserable, run down tourist trap which nevertheless generates a large amount of attendance (it is the ocean which draws).
• The only lesson from this operation is that any good nearby recreation enterprise should drive it out of business.

The conclusion to be drawn from this fieldwork sample are as follows:

• There are several beautiful, expandable, well located major parks in this market area.

• They have in the past generally taken a position of low capital investment with resulting low per capita income generation--parks of the old school.

• Some are able and ready to improve product, expand format and theme development. In fact they are in the process of doing so. The market place will respond to that transition. Those who can aggressively improve should dominate more than ever. The weaker parks will weaken more.

• Any new capital intensive operation will have to reckon with the expansability of that existing, depreciated capital base.

• The need for higher quality product in the commercial amusement field is quite real and extensive. Too many low grade operations populate the market place.

• There is an excellent opportunity in Holland for developing new quality operations with selected thematic market positioning.

Detailed thematic development is beyond the scope of this brief analysis, but several types of park operations are under represented in the market served from Bergen Op Zoom such as:

• Contemporary game electronics, and automation in the style of Sesame Place in Dallas and Philadelphia.

• Capital intensive waterplay attractions with wave machines, complex water slides, and related attraction development.

• Sea life park development in the manner of Sea World in California and Florida with elements of the Baltimore Aquarium.
• More entertainment—live shows, color and sound in recreation parks tied in with nighttime operation.

• Improvements in specialty merchandising akin to Faneuil Square in Boston or Ghirardelli Square in San Francisco.

• Peripheral guest housing development in the manner of the Sports Centrum—asynergistic addition to park development in this marketplace.
Harrison Price Company's brief examination of the location at Bergen Op Zoom leads us to these conclusions:

- The city is beautiful, historic, well planned and ripe with local color. It has ambience.
- The city is central to a total market of 24 million—not the largest market position in Holland, but still very large (it is 3 million more than the well developed commercial recreation market in San Francisco for example).
- The specific site—the Molenplaat—is a triangular piece of ground directly west of the Civic Center within the new harbor development. It would be well suited to harbor/port/shipping thematic development in a historic connotation.
- The site has sufficient size—now in excess of 300 acres and expandable—to do something significant.
- Access improvement to the island from the north and south loops of the highway system is essential. These improvements are presently planned to become realities in five or six years.

In the context of the overall commercial recreation business in Holland, certain windows of opportunity would appear to be appropriate in Bergen Op Zoom. They are listed as follows:

- A major sea life park and aquarium—investment level on the order of 100 million guilders—attendance potential 1.5 to 2.5 million—role model—Sea World in Ohio plus the Baltimore Aquarium.
- A park of the above kind could also contain an extensive waterplay and sports complex of the kind developed by Wet 'N Wild in Orlando and Silver Dollar City in Dallas, Texas. These operations represent investments on the order of 25 million guilders and draw more than a million visitors.
• The site could be an outstanding location for a destination resort development in the manner of Het Vennenbos with its 500 residence units, and its Sports Centrum. This kind of an operation would blend well with the above operations as each would contribute demand for the other. This kind of complex represents an investment level on the order of 50 million guilders and it draws on the order of 700,000 visitor nights per year. These operations are functioning at year round occupancy levels in excess of 90 percent, almost season proof. This location could be the first of these operations adapted to a seaside environment.

• HPC does not see this location as an optimum site for a themed amusement park of the ride variety. There are better and more competitive locations in Holland for a capital intensive, mass attendance park in the role model of a Six Flags park like those in Atlanta or Dallas. Certain elements of such a park could fit but not its overall concept.

• A possible embellishment of the first three items is to include an integrated specialty center development containing diverse shops, restaurants and entertainment themed as an old port town. The initial size would be on the order of 50,000 square feet or more of net rentable space, containing 30 to 40 lessee operators. The role model is Ghirardelli Square in San Francisco (an improved Ports 'O Call in Los Angeles) or Seaport Village in San Diego. Initial investment required is on the order of 20 million guilders. Visitation would be on the order of 2 million per year.

These are all preliminary concepts requiring more specific planning effort, but in summary, Harrison Price Company believes that a great and powerful draw could be put together out of these elements in Bergen Op Zoom.