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Charrette Review of Project Concept

Harrison Price Company

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Charrette Summary

CONCEPT ANALYSIS FOR THE E.R.C. PROJECT IN LIMBURG PROVINCE

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May, 1989

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Section 1

INTRODUCTION

Kempense Steenkolenmijnen (KS), the Belgian national coal corporation, is investigating the feasibility of developing a major recreation/leisure/education center, dubbed the E.R.C. Project, in Limburg province. The proposed site (Figure 1) is the recently closed coal mine at Waterschei. Final site boundaries have not been fixed, but the total area of the complex is assumed to be in the range of 1,000 to 1,400 hectares. Waterschei is easily accessible by the A2 Motorway, a major east-west route which connects Brussels with the Ruhr region of West Germany. Planning for the ERC Project began with a feasibility study for a theme park some two years ago under the direction of the Limburg development authorities. KS took on responsibility for the project in early 1988. Under KS's direction, the ERC evolved into a bigger and more important project, with significant cultural, educational and resort components added to the original amusement facility. A comprehensive feasibility and planning effort was commissioned in July 1988, and completed in October 1988, which outlined a concept, plan and economic projections for an ERC Project which included two major attractions-the ERC Center and ERC Park-a shopping village, and a destination resort complex. Based on the favorable results of this plan KS established the basic conditions under which the project could proceed, namely securing the site, seed implementation money of BF5 billion, and a commitment for an access road to the motorway. These condition were met as of March 1, 1989.

As a check on the planning process KS elected to relook at the concept presented in the October 1988 plan, including project working parameters, supportable investment and mix of components, particularly for the attractions area. Accordingly, Harrison Price Company was retained by KS to organize and carry out a charrette conference directed at reviewing the existing concept from a market and economic viewpoint and making amendments as appropriate. HPC and KS invited a group of designers, con-
Figure 1

PROPOSED SITE
cepteurs, planners and experts in the recreation and leisure time business to treat this issue in a four-day conference held at the Hotel Mardaga near Genk on March 20-24, 1989.

Participation in the charrette is identified in Table 1. Outside participants listed in the table were selected for the range and quality of their background in the leisure time field, their knowledge of Europe and their ability to creatively contribute to the conceptual aspects of the project. Herb Rosenthal is a leading American designer of museums and world’s fair pavilions with credits such as La Ronde at the Montreal World’s Fair, Greenfield Village, the Huntsville Space and Rocket Center and the National Maritime Museum. Ignace Graba, a Belgian living in Paris, is a noted artist and conceptual engineer. Dirk Verhofstadt is a Belgian television producer. Raymond Wouters is with the Hasselt office of the planning and engineering firm Groep Swartenbroekx, and has been associated with the project from its inception. Jan Scheepers is with the project management division of Philips in Eindhoven. Rudd de Clercq previously was the general manager of the de Efteling theme park in Holland and currently owns and operates the Dolfinarium Harderwijk. Dominique Mauduit is a Paris based concepteur who runs the creative department of Publicis, one of the largest advertising agencies in Europe. Harrison Price has 35 years experience in economic planning for major attractions including all of the Disney parks, eight world’s fairs and countless museums and other destination facilities. Nick Winslow has 20 years experience in leisure time facility planning, and spent five years with Paramount Pictures Corporation heading a number of technologically oriented entertainment subsidiaries, including the predecessor to Showscan Film Corp. The KS project team of Thyl Gheyselinck and Julien Nijs were active and constructive participants in the charrette.

As noted above, the principal goal of the charrette was to review the October concept for the project, strengthen it as appropriate with market factors and client criteria, and review potential attendance, size and other economic characteristics. To enable the participants to address these objectives within the time frame available required that they be well informed about conditions impacting the proposed project’s concept.
Table 1

LIST OF PARTICIPANTS

KEMPENSE STEENHOLENMIJNEN
Thyl Gheyselinck
Julien Nijs

HARRISON PRICE COMPANY
Harrison A. Price
Nicholas S. Winslow

HERB ROSENTHAL & ASSOCIATES
Herb Rosenthal

CONCEPTEUR/DESIGNER
Ignace Graba

TELEVISION PRODUCER
Dirk Verhofstadt

GROEP SWARTENBROEKX
Raymond Wouters

M.D. PHILIPS COMPANY
Jan Scheepers

DOLFINARIUM HARDERWIJK
R. de Clercq

CONCEPTEUR
Dominique Mauduit
and development parameters. Accordingly, a background briefing book was prepared and distributed in advance of the charrette for review by participants which contained baseline data on resident demography, Belgian tourism, background on the ERC Project, attendance and other data on major European parks and attractions, and miscellaneous data on Belgium and Bokrijk, a nearby attraction.

Operating in the original "storyboard" conference style developed by Walt Disney, an advance agenda was also prepared as a rough guideline for the meeting. It is shown in Figure 2.

The sections that follow highlight and summarize pertinent observations and the consensus of the charrette participants. Although opinions were diverse the group was essentially in agreement on most key elements.
I. INTRODUCTION AND ORIENTATION (Monday evening)
   • Introduction of Participants
   • Role of the Strategy Session in the Total Planning Process
   • Goals and Objectives of the Strategy Session

II. SITE TOUR

III. SUMMARY OF THE PROPOSED E.R.C. PROGRAM
   • Project Background and Summary of Planning Efforts to Date
   • Site Characteristics and Issues
   • Proposed Development Scope and Content
   • Role of the E.R.C. Center Amusement and Other Leisure Facilities in the Overall Project and its Intended Competitive Position in the Marketplace

IV. OVERVIEW OF THE MARKET ENVIRONMENT
   • Size of the Available Resident Market
   • Size and Characteristics of the Available Tourist Market
   • Aggregate Market Support
   • Inventory and Operating Experience of Existing Attractions in Europe
   • Attractions Proposed for Europe
   • Implications of Market Factors for the E.R.C. Project

V. DELINEATION OF MAJOR STRATEGIC ISSUES FOR THE E.R.C. PROJECT
   • Relationship and Merits of Principal Project Components (E.R.C. Center, other leisure facilities, specialty food and retailing, accommodations)
   • Potential Synergy Among Components
   • Mix and Balance of Activities Required to Achieve "Critical Mass" and Optimize Attendance and Financial Performance
   • Image and Visibility Engendered by the Activities Mix in the Competitive Marketplace
   • Desirability and Phased Development
VI. EXPLORATION OF E.R.C. CENTER DEVELOPMENT ALTERNATIVES

- Discuss Primary Conceptual Emphasis and Review Experience of Relevant Comparable Attractions, Including:
  
  **Theme Park** (U.S. parks, De Efteling, Alton Towers, EuroDisneyland, Europa-Park, etc.)
  
  **Entertainment Center** (Church Street Station, Tivoli Gardens, Seattle Center, Ontario Place)
  
  **Exposition** (Universal and specialty category world's fairs, floral expositions, permanent expositions)
  
  **Other Specialty Attractions** (La Villette, Madurodam, Taussaud's, Legoland, Evoluon, etc.)

- Determine Optimum Basic Format and Identify Principal Component Attractions

VII. ASSESS RECOMMENDED E.R.C. DEVELOPMENT PROGRAM

- Develop Preliminary Market Penetration and Attendance Estimates
- Determine Preliminary Sizing Guidelines by Major Component
- Prepare Preliminary Estimates of Per Capita and Total Gross Revenue
- Evaluate Overall Magnitude of Required Capital Investment

VIII. ADJOURNMENT

- Precis of Charrette Findings and Recommendations
- Outline of Follow-On Planning Requirements
Section 2

PROJECT BACKGROUND

As noted in the Introduction, the ERC Project has its origins in a proposal to develop a theme park in Limburg. The installation of KS as the principal protagonist led to the establishment of important guidelines and precepts which condition the conceptual approach to the Project. These guidelines include the following:

- The project should go beyond fun and games. An amusement only project is not deemed worthy of KS involvement.

- The project should have sufficient critical mass to be a self-contained destination resort which generates incremental excursion and overnight tourism to the region, thereby stimulating employment and economic development opportunities. The final product should not be seen as competitive with regional theme parks.

- Education, the reemergence of the EEC nations as one of the world's dominant economic and cultural forces, and Belgium's central role in the EEC are important to the theme and content of the project.

With these guidelines in mind the original planning team of EDAW, ERA, Showscan and Groep Swartenbroekx prepared a concept plan and feasibility study for an ERC Project which included the following components:

1. **ERC Center**: The main attraction of the Project is the ERC Center, a year round world-class attraction which is intended to be a front window depicting the unity and diversity of EC life. The basic premise is to present a number of sectors of activity in a unified context. In addition to theme pavilions similar to those of world's fairs, the ERC Center would have an EEC exposition element which depicts what the EEC is and wants to be, and perhaps a communications exposition component. Major attractions would not have a nationalistic flavor, but in-fill areas highlighting the characteristics of participating countries would be
included to add capacity and attraction value. Additional features would include small, individual or interactive learning modules, and a substantial live programming component staged with local talent and persons brought in from throughout the EC on exchange programs. The ERC Center would be designed to introduce and orient Europe to non-European visitors in addition to being a magnet for European residents.

Of all the components in the project, KS is most committed to the ERC Center.

2. **ERC Park**: To meet the "critical mass" and "self-contained destination resort" criteria established by the client, the planning team added a second major gated attraction, the ERC Park, a themed attraction built around the myths and legends of the 12 EC member countries. The rationale for the ERC Park included:

a. Adding to the critical mass and broadening the market appeal, and hence the draw, of the entire project.

b. Increasing the entertainment offerings of the project, and thus the potential length of stay, adding support for overnight accommodations.

c. Increasing project operating income, allowing for wider coverage of site and project infrastructure.

KS is not firmly committed to the ERC Park, and its theme, and economic and physical parameters are up for reconsideration.

3. **Accommodations and Supporting Facilities**: The current plan calls for a shopping village, at least one golf course, hotels and motels, and one or two bungalow parks. The economic and planning models assume that patronage for these facilities will derive from visitors to the ERC Center and the ERC Park in addition to those attracted to the project by its recreational opportunities and other amenities. It is KS's
position that these facilities should be included as required and as economic.

4. **Educational Component**: KS is most interested in making available a strong, unique educational component within the ERC Project. The content and format of this component have yet to be established, and the education center is not part of the economic package covered in this report.

It is this baseline concept that was assessed during the charrette. Because of its high priority, uniqueness, risk and level of detail of the existing plan, the ERC Center was given the most attention by the charrette group. The balance of this section presents basic market and site issues in anticipation of a discussion of concept in Section 3.

**AVAILABLE MARKET**

The available market for the ERC Project is characterized by a very large resident component, one of the largest in the world attributable to the population density of the region, no domestic tourist market \(^1\), and a small, underdeveloped foreign tourist market. The resident market was defined as the 160 km radius from the site and is comprised of some 35.8 million people configured as follows:

<table>
<thead>
<tr>
<th>Country</th>
<th>Population (millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>9.5</td>
</tr>
<tr>
<td>France</td>
<td>1.0</td>
</tr>
<tr>
<td>Netherlands</td>
<td>11.7</td>
</tr>
<tr>
<td>Luxemburg</td>
<td>0.3</td>
</tr>
<tr>
<td>West Germany</td>
<td>13.3</td>
</tr>
<tr>
<td>Total Resident Market</td>
<td>35.8</td>
</tr>
</tbody>
</table>

The foreign tourist market not included in the resident market is estimated at 2.8 million persons derived as follows:

\(^1\) All of Belgium is included in the resident market.
Total foreign visitor nights  10.1 million
(Includes 3.2 million from
the Netherlands and 1.6 million
from Germany)

Deducts:
90% of Netherlands  3.2
50% of Germany  0.8
Total deducts  4.0

Incremental visitor nights  6.1
Average length of stay  2.2 nights

Total incremental tourists  2.8 million

The total available market, then, is 38.6 million persons which compares very favorably with the leading attraction markets in the world, as shown in the text table below:

<table>
<thead>
<tr>
<th></th>
<th>ERC</th>
<th>Paris</th>
<th>So. Calif.</th>
<th>Orlando</th>
<th>Tokyo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident</td>
<td>35.8</td>
<td>15.0</td>
<td>12.8</td>
<td>4.8</td>
<td>36.8</td>
</tr>
<tr>
<td>Foreign Tourist</td>
<td>2.8</td>
<td>8.0</td>
<td>3.6</td>
<td>1.8</td>
<td>2.2</td>
</tr>
<tr>
<td>Domestic Tour.</td>
<td>n.a.</td>
<td>10.0</td>
<td>21.0</td>
<td>21.0</td>
<td>15.0</td>
</tr>
<tr>
<td>Total</td>
<td>38.6</td>
<td>33.0</td>
<td>37.4</td>
<td>27.6</td>
<td>54.0</td>
</tr>
<tr>
<td>Major Attraction</td>
<td>16-17</td>
<td>n.a.</td>
<td>33.6</td>
<td>35.5</td>
<td>20.0</td>
</tr>
<tr>
<td>Attendance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ratio to Market</td>
<td>0.43</td>
<td>n.a.</td>
<td>0.9</td>
<td>1.29</td>
<td>0.38</td>
</tr>
</tbody>
</table>

As an indicator of potential saturation, the ratio of attendance at major attractions to total available market was measured. The table above shows that the heavily built and mature markets of Southern California and Orlando have ratios of 0.9 to 1.29, while the emerging Tokyo market, with its enormous resident base, has a relatively low ratio of 0.38, and the ERC market a comparable ratio of 0.43. The comparison indicates that the ERC market is far from saturated, with substantial upside attendance potential.
OTHER MARKET FACTORS

Improved Access

The site is currently well served by the excellent Belgian and European motorway systems. In 1993 the Channel Tunnel is to open connecting Brussels South with London's Waterloo Station, and greatly improving access from Great Britain. Also in 1993 France's high speed train the TGV is scheduled to begin service from Paris. Improved access should be a stimulus to Belgium's underdeveloped tourist industry.

Seasonality

Seasonality is an important factor in Europe's leisure time industry, as annual holidays tend to be highly concentrated in July and August. In Belgium for example, 82.1% of total tourist visitor nights occur in the six month period April through September, and 48.4% occur in July and August. While these patterns are slowly changing as European families begin to take more excursion trips and short holidays, and the impact of seasonality will be tempered at the ERC Project because of the year round schedule of the ERC Center and the dominance of the resident population in the total market, seasonality must be properly dealt with in the planning process.

Changing Age Patterns

It was noted during the charrette that, as in the United States, the population in Europe is aging. In the Benelux countries, for example, population in the under-25 age groups, which traditionally have a high propensity to attend attractions, is projected to decline between 1984 and 1995, while population in the older groups increases, as shown below:

<table>
<thead>
<tr>
<th>Age</th>
<th>Growth 1984-1995 (%)</th>
</tr>
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<tbody>
<tr>
<td>0-14 Years</td>
<td>(11%)</td>
</tr>
<tr>
<td>14-24</td>
<td>(20%)</td>
</tr>
<tr>
<td>24-40</td>
<td>6%</td>
</tr>
<tr>
<td>40-49</td>
<td>38%</td>
</tr>
<tr>
<td>50-64</td>
<td>10%</td>
</tr>
<tr>
<td>&gt;65</td>
<td>21%</td>
</tr>
</tbody>
</table>
This shift in age composition in the resident market is further reason to emphasize the ERC Center, which should have strong adult appeal, over a more traditional theme park. It was noted that creating an attraction which would appeal to the aging U.S. population was one of Disney's primary objectives in building the EPCOT Center at Walt Disney World.

SITE

The charrette team was unanimous in its belief that the location of the proposed site is excellent for the ERC Project in terms of access and market proximity. It was noted that Waterschei is much more accessible than the locations of most major European attractions.

The site also presents serious planning and engineering challenges due to blight (sludge basins and tailings), soil, terrain, landscaping, and topography all of which can be solved with money. The current plan has BF 5.7 billion for site development and buildings.

COMPETITIVE ENVIRONMENT

The competitive market at present is currently comprised of fairly conventional theme parks of varying quality such as de Efteling, Walibi, Phantasialand and Mirapolis. Attendance at these parks ranges from just under 1 million at Mirapolis to just over 2 million at de Efteling and Phantasialand. A number of major attractions are committed or well into the planning process, however. These include Euro-Disneyland, Asterix and the Smurff parks in France, a Busch park and possibly a Warner studio attraction near Barcelona, a Six Flags park in southern Spain, and The Battersea project in London. The Wonder World project in Corby, England is now dead, and Battersea is in trouble. Brupark in Brussels is also becoming more aggressive in attracting visitors as evidenced by the recent opening of the Kinopolis and the Oceadium. Other major attractions in Brussels include Grand Place (2.28 million) and St. Michael's Cathedral (1.28 million). The historic city of Bruges attracts 585,000 visitors annually. The biggest new factor in the market, however, will be Disney because of the short and long term magnitude of the destination complex Disney will build. Asterix appears to be a well conceived project and could give additional critical mass to the Paris market.
Nevertheless, it was the consensus of the group that there is more than sufficient room for one or more high quality, innovative attractions at the ERC site.

Two problems currently cloud the attractions industry in Europe, namely the disappointing performance at the newly developed parks in France, and the continuing low levels of per capita spending at even the more successful European parks. The performance at three recently opened French parks has led to a wait and see attitude towards future projects by several major French lenders. Zygofolis in Nice had two disastrous seasons before it closed. Attendance at Futuroscope in Poitiers has been a disappointing 400,000 and the attraction only survives because of its government subsidy. Annual attendance at Mirapolis continues to be less than 1 million and the park is reportedly in financial trouble. There is substantial concern that the Smurff park will not perform to projection. The poor performance by the new French parks can be attributed to a number of factors including:

1. Poor themes or concepts.
2. Poor site selection.
3. Inadequate financing.
4. Poor market research leading to overstated attendance and per capita spending projections.
5. Inefficient use of capital and poor construction budget control leading to overspending per unit of ride and show capacity.
6. Comparatively low population density.

As noted above, the other major problem is the low per caps. The current standard for per caps at Belgian attractions is BF650 to BF700 of which 60% to 65% comes from the gate. de Efteling had a 1988 per cap of approximately BF600 of which BF360 was derived from admissions and BF240 from in-park spending, mostly for food and beverage. Per caps at Mirapolis are estimated at BF1,200 of which half came from admissions. The high costs are considered to be partially responsible for the poor attendance performance at Mirapolis. It was noted during the charrette that one of the main differences between spending patterns at European and American attractions is the low per capita spending for merchandise, particularly souvenir merchandise, at European attractions.
MARKET SUMMARY

The charrette participants concluded the following concerning the market for the ERC Project:

- The ERC Project has an outstanding resident market and the components of the project should be designed and built principally for the resident market.

- The foreign tourist market is currently weak but conditions are favorable for development.

- The market is open for a AAA attraction of high quality, unique character and substantial impact.

- Site location is excellent.

- Site character, seasonality, changing age patterns, below average propensity to attend attractions and low per caps are planning challenges which must but can be solved.

SCHEDULED OPENING DATE

Current planning calls for the ERC Project to open for the 1992 season. This schedule is feasible but extremely tight. It remains a reasonable target but, in the opinion of the charrette participants, is not essential to the well being of the project. Europe (Spain) will host both a universal category world's fair in Seville and an Olympic Games in Barcelona in 1992. Recent experience has shown that permanent attractions experience an erosion of support during such short term events. Further, an excessive acceleration of the project schedule could lead to errors in planning and/or increased capital costs. Slippage of the opening date to May or June of 1993 would not necessarily be desirable but would not be a disaster.
CURRENT ECONOMIC PLAN

The October 1988 economic plan for the attractions and other components of the core ERC Project include annual attendance estimates of 2,610,000 for the ERC Park and 3,180,000 for the ERC Center, for a combined attendance of 5,790,000. Total operating revenue is estimated at BF4.851 billion, including BF2.865 billion in admission revenue and BF1.716 billion in food and merchandise revenue, or about BF791 per capita. These per capitas are consistent with attraction experience in Europe. To this is added BF131 million in sponsorship revenue and BF111 million in lease revenue from the shopping village, bringing total projected gross revenue to BF4.823 billion. The estimated development cost of the ERC Project is BF14.6 billion comprised as follows:

<table>
<thead>
<tr>
<th></th>
<th>BF</th>
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<tbody>
<tr>
<td>Site &amp; Building</td>
<td>5.7</td>
</tr>
<tr>
<td>Attractions</td>
<td>6.4</td>
</tr>
<tr>
<td>Development</td>
<td>2.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>14.6</strong></td>
</tr>
</tbody>
</table>

"Development" includes design and engineering, pre-opening costs, interest during construction and starting working capital. As a general rule in the attractions industry annual gross revenue should equal at least 50% of capital cost for a project to be feasible. The ERC Project falls short in this regard, although revenues from hotels, bungalow parks and other components outside the core project are excluded and could be substantial. A seed contribution of BF5 billion would bring the amortizable capital cost down to BF9.6 billion, indicating financial feasibility.

The following section evaluates in greater detail the October 1988 concepts for the ERC Center, the ERC Park and the Village, and suggests refinements to these concepts.
Section 3

ERC CENTER CONCEPT EVALUATION AND REFINEMENT

On the first day of the charrette the client asked the group to react to the specific design concepts proposed for the core project in the October 1988 plan. This evaluation is appropriate given the major commitment of time and money invested in the planning process for this project. In essence the client was saying 'I have what I need to implement the ERC Project - BF5 billion of initial capital, the site and the access road. I have to put the project in place or fail to make the targeted opening date of June 1992. Tell me what is wrong with what I have and better it or I go with what I have.' This section of the report evaluates the October 1988 design concepts for the ERC Center and suggests refinements which the charrette participants believe will improve the project. A wide range of concept alternatives was presented and discussed during the course of the charrette. In this report HPC has elected to show the general thrust and logic of the thought process rather than present each concept in detail. Because of the level of commitment by the client, its central importance to the Project, and the depth of the planning to date, the ERC Center is addressed in greater depth than the other proposed components. This section deals with the Center only. The Park, Village and other supporting components are covered later.

BASELINE ERC CENTER DESIGN CONCEPT

The design concept for the ERC Center as presented in the October 1988 plan carries as its main theme the unity and diversity of the European Economic Community, with particular attention to the changes represented by the 1992 unification process. The underlying philosophy of the concept was based on addressing a number of key themes through 6 to 12 major rides and shows. The themes upon which the concepts for these major rides and shows are based are shown in Table 2. The major rides and show pavilions are designed around a main EC Plaza, and the these
Table 2

THEMATIC BASE FOR THE ERC CENTER DESIGN CONCEPT

<table>
<thead>
<tr>
<th>Art</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Architecture</td>
</tr>
<tr>
<td>- Sculpture</td>
</tr>
<tr>
<td>- Painting</td>
</tr>
<tr>
<td>- Literature</td>
</tr>
<tr>
<td>- Theater</td>
</tr>
<tr>
<td>- Cinema</td>
</tr>
<tr>
<td>- Television</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Politics and People</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Rulers</td>
</tr>
<tr>
<td>- Leaders</td>
</tr>
<tr>
<td>- Revolution</td>
</tr>
<tr>
<td>- Democracy</td>
</tr>
<tr>
<td>- War</td>
</tr>
<tr>
<td>- Exploration</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Religion and Philosophy</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Christianity</td>
</tr>
<tr>
<td>- Judaism</td>
</tr>
<tr>
<td>- Islam</td>
</tr>
<tr>
<td>- Druids/Pantheism/Humanism</td>
</tr>
<tr>
<td>- Major Philosopher/Thinkers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Economics</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Agriculture/Natural Resources</td>
</tr>
<tr>
<td>- Industry</td>
</tr>
<tr>
<td>- Commerce</td>
</tr>
<tr>
<td>- Science</td>
</tr>
<tr>
<td>- Communications</td>
</tr>
<tr>
<td>- Travel</td>
</tr>
</tbody>
</table>

components are linked by "streets" which depict the EC nations. The entire EC Center is enclosed, although parts of the Center can open onto outdoor gardens during periods of good weather.

A design premise of the major rides and shows was an emphasis on software driven attractions which theoretically could be easily and inexpensively changed. The validity of this premise was challenged by a number charrette participants. Designs for major themed rides and shows are highly specific to the individual storyline of the attraction. Utilizing the hardware configuration for a different storyline is not as easy in practice as it is in theory. Further, the cost of the software for such attractions represents a very large percentage of the total cost. Reformatting using new software is not inexpensive.

Other attributes of the major rides and shows include:

1. Inclusion of a pre-show and a post-show. The post-show or exit areas would include interactive devices to delve more deeply into the themes of the individual attractions.

2. Use of a mag card or similar reservations system to avoid queuing. Several members of the charrette team challenged the premise that a reservations system would have a material affect on how visitors to the ERC Center allocate their time during a visit, would reduce peaking and congestion at the most popular attractions, and would reduce queue times to 15 minutes during peak periods.

Ten major rides and shows are identified in the October plan. Of these, seven are recommended for inclusion in the ERC Center: five in the opening year of 1992, with new attractions added in 1995 and 1996. The major rides and shows are described in Table 3.

Other major attractions recommended for inclusion in the ERC Center in the October 1988 plan include:
Table 3

MAJOR RIDES AND SHOWS PROPOSED FOR THE ERC CENTER IN THE OCTOBER 1988 PLAN

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Yr. Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geodrama</td>
<td>3-D film presentation of the geological and political development of Europe. Uses a spherical and one or more curved screens to create illusion of looking at the globe.</td>
<td>1992</td>
</tr>
<tr>
<td>Invisions</td>
<td>Tour through history of European art. A dark ride using practical sets and filmed sequences.</td>
<td>1992</td>
</tr>
<tr>
<td>Lets Play Politics¹</td>
<td>Audience choice game allowing players to see the results of their actions through a branched media presentation.</td>
<td>1992</td>
</tr>
<tr>
<td>Sacred Sounds</td>
<td>High impact audio-visual theater depicting the sights and sounds of the major religions. Features film in a domed theater.</td>
<td>1992</td>
</tr>
<tr>
<td>Transport of Delight</td>
<td>Ride allowing the visitor to experience numerous kinds of transportation from different eras. Uses a simulator theater.</td>
<td>1992²</td>
</tr>
<tr>
<td>Call of the Sea</td>
<td>Water dark ride using practical sets, film and live actors. Based on marine life and man's interaction with the sea.</td>
<td>1995</td>
</tr>
<tr>
<td>Industrial Revolution</td>
<td>An dark coaster ride featuring film scenes depicting the economic transformation of Europe.</td>
<td>1996</td>
</tr>
</tbody>
</table>

Interpol, Rites of Spring and Eurosub - Not Included.

¹ Also called "Lets Play Democracy".

- EC Center - A state-of-the-art pavilion focusing on matters of special interest to the European Community. Proposed as a sponsored attraction.

- Industry Pavilion - A sponsored exposition featuring the activities of European industry.

- Main Amphitheater - A 1,000 seat multi-purpose live performance venue designed to add 1,000 outdoor seats during the summer.

The October plan also calls for some secondary attractions although these are defined in less detail. Discussed in the plan are an Exploratorium-type facility or an Exhibition Center, an Interactive Library; a Central Plaza with Mini-Amphitheater, Dance Palace and Children's Play Area; and the Country Themed Zones which make up the "streets" within the Center. The proposed configuration is shown in Figure 3.

DISCUSSION OF BASELINE CONCEPT

The charrette team discussed the baseline concept at some length, expressing a number of opinions and concerns about the concept. Majority, if not necessarily unanimous, opinions were set forth on the following issues:

1. Enclosure: There was substantial concern, particularly among the American contingent, about making the Center an enclosed, indoor attraction. Particular note was taken of the dismal history of indoor attractions in the United States. To date five major indoor facilities have been built including: Old Chicago, The World of Sid & Marty Krofft in Atlanta, Autoworld in Flint, The Power Plant in Baltimore and The Admiral in St. Louis. The last two were developed by Six Flags. Autoworld was run by Six Flags under a management contract. All went bankrupt. Old Chicago, opened in the Chicago suburb of Bolingbrook in 1975, was a hybrid of a
Figure 3
ERC CENTER BASELINE SCHEMATIC PLAN
festival center and an amusement park. It contained some 30 rides and other entertainment activities in an enclosed area of about 5.5 acres, together with 198,000 square feet of specialty shop and restaurant space. Initial market response was encouraging with 2 million first year attendance. Attendance plummeted to 900,000 the second year as the operation failed to generate more than nominal repeat visitation and quickly exhausted the pool of first-time visitors. Retail operations never achieved more than 70 percent occupancy. The park closed after its second season, briefly reopened in 1978, and then closed for good.

The Krofft park opened in the OMNI megastructure in 1976, and contained a total of 150,000 square feet of attractions on eight different levels. It was divided into five theme areas drawn from the Krofft puppet characters, with emphasis on live entertainment and dark rides. The park closed in five months after drawing 300,000 visitors.

Autoworld opened on a 22 acre site on the Flint River in 1984. With some 280,000 square feet of attraction space, the project included an artificial river, multimedia theater, children's play area, amusement arcade, two major dark rides, a 500-seat IMAX theater, several other rides and extensive displays. In contrast to its pre-opening estimate of 1 million attendance, first year attendance was 463,173 with a $12.00 per cap. Second year attendance was 284,376 with a slightly higher per cap. The park had a large operating loss each year and has been closed since 1985.

The Power Plant was developed at Baltimore's heavily visited Inner Harbor and opened amid much fanfare in 1985. First year attendance was a very disappointing 388,334 with an $8.76 per capita. Attendance and per capitans increased to 485,250 and $10.50, respectively, in 1986, but the operating
loss for the project also increased. The attraction was closed in 1986 and has not reopened.

The Admiral opened in 1987 and closed after three months of operation. HPC has no operating data on the project.

No indoor park to date has come up with a truly workable concept that could be considered the equal of a preeminent outdoor attraction. They tend to be claustrophobic and stifling in warm weather with large crowds. Air conditioning costs are higher and expansion is difficult. The cost of the enveloping structure is a net add-on, estimated at some BF1.3 billion in the case of the ERC Center. The promoters and developers of indoor attractions have rationalized these issues by assuming that the indoor environment will stimulate year-round patronage, and thus offset seasonal peaking, inherent capacity constraints and higher capital and operating costs. Seasonality in attractions, however, is inherent due to school holiday schedules and weather. Experience has shown that people prefer to be outdoors during periods of good weather (which happens to coincide with school summer holiday and peak travel periods) and that indoor attractions tend to have substantially lower market penetration rates than outdoor parks. It was the consensus but not the unanimous opinion of the charrette participants that the ERC Center should have covering and other protection to allow it to function throughout the year, but that it should be viewed as an outdoor attraction with major indoor components rather than an indoor attraction with some outdoor features.

2. **Crowding**: Even with the addition of garden space in the peak summer periods, an enclosed ERC Center will inevitably experience some severe crowding because spreading crowds from the focus of activities, the core attractions, is not possible. For example, annual attendance of 3.2 million at the
ERC Center would generate some 17,090 persons on site on a
design day, calculated as follows:

<table>
<thead>
<tr>
<th>Attendance</th>
<th>3,200,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peak month @ 18.2%</td>
<td>582,400</td>
</tr>
<tr>
<td>Design week (/4.43)</td>
<td>131,467</td>
</tr>
<tr>
<td>Design day @ 20%</td>
<td>26,293</td>
</tr>
<tr>
<td>Peak on-site @ 65%</td>
<td>17,090</td>
</tr>
</tbody>
</table>

The baseline plan has 50,000 m² in the dome, equivalent to
538,000 ft², or 12.35 acres. An accepted density planning
factor for attractions is 800 persons on-site per acre, with
absolute peaks (not design day) at 1,200 persons per acre.
The current plan calls for 17,090/12.35, or 1,384 persons per
acre, indicating a severe crowding problem. Opening up the
plan can alleviate much of the crowding problem.

3. Overuse of Film: In response to the premise that the major
rides and shows be software driven to enhance their change-
ability, the baseline design relies almost exclusively on film
for storytelling and interpretation. As noted earlier the
position was expressed that changing attractions by
installing new software is more difficult and costly in real-
ity than it is in theory. In addition, the opinion was
expressed by Nick Winslow that the use of film in dark rides
as proposed was neither feasible nor effective because of
viewing angles, movement, masking requirements and film
wear. Whether or not these opinions are accepted, it was the
consensus of the group that the proposed plan relies exces-
sively on film presentations. Film has a rightful and impor-
tant place in an attraction of the type proposed, but the ride
and show concepts for the major components at the ERC
should have a substantially wider range of presentation
systems.
4. **Ride and Show Capacity and Mix:** The hourly capacity of the seven major rides and shows, the EC Pavilion, the Industrial Pavilion, the Amphitheater and the Exhibition is estimated in the baseline plan at 14,818 persons, excluding main entry theater, pre- and post-shows, street entertainment, children's play area and the gardens. To achieve the critical mass and diversity of attractions necessary to bring in and service the 3.2 million visitors projected, the ERC Center needs 1.5 to 2.0 units of hourly capacity per on-site guest in at least 30 rides, shows and other attractions. It was suggested that the baseline concept needs a plethora of additional things to do to avoid congestion on major attractions. An important goal of future planning should be to identify and size these secondary attractions. A first cut at an attraction mix suggested the following:

<table>
<thead>
<tr>
<th>Type</th>
<th>Number and Capacity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major</td>
<td>8 @ 1,500 per hour</td>
<td>12,000</td>
</tr>
<tr>
<td>Secondary</td>
<td>36 @ 500 per hour</td>
<td>18,000</td>
</tr>
<tr>
<td>Theaters/shows</td>
<td></td>
<td>4,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>34,000</td>
</tr>
</tbody>
</table>

5. **European Character:** The opinion was expressed by several of the European participants that the baseline concept used Europe but does not adequately explore the unique character of Europe. The format fails to achieve an adequate European character, perhaps because it relies on a pigeon hole, rather than and ecological, approach. It was suggested that the true common ground for the European Community is its young people and its creativity.

6. **Need for a Blockbuster Theme Statement:** There was a perception by the charrette group that while the baseline concept presented several outstanding attraction ideas, the Center would benefit from some form of blockbuster theme.
statement that would in itself be a compelling reason to visit the ERC Center - a "weenie" in Walt Disney parlance.

In summary, it was the consensus but not necessarily the unanimous conclusion of the charrette group that while many of the themes and storylines were intriguing, the baseline concept has some shortcomings in terms of physical configuration, capacity, delivery systems and interpretation of the unique characteristics of the EC. The baseline concept is, however, a very useful building block, and was used as the basis for several lengthy discussions on concept refinement.

ISSUES CONDITIONING ERC CENTER CONCEPT REFINEMENT

Throughout the course of the charrette there were numerous discussions aimed at defining the functional type and characteristics of the ERC Center, and how this definition impacts thematic organizing principles, attraction characteristics and mix, etc. A summary of these discussions follows.

1. Format - There was a divided opinion concerning whether or not the ERC Center was a theme park. The American point of view was that because the ERC Center is a highly capitalized mass attraction, operating on a commercial basis, with rides and shows based on a specified theme like Disney's Magic Kingdom (fantasy), Universal Studio Tour (cinema) or Sea World (sea life); it is a hybrid form of theme park. These true theme parks were differentiated from parks which call themselves theme parks but are in fact fancy amusement parks, like Magic Mountain or Six Flag Over Texas. The European participants wanted to avoid the stigma of having the ERC Center classified as a theme park as such projects are perceived in Europe and pointed out that major expositions were another form of theme attraction. The themes of world expositions held over the last thirty years are shown in Table 4. A consensus emerged that the ERC Center will function economically like a theme park but in format should
<table>
<thead>
<tr>
<th>Themes</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Man &amp; His World</td>
<td>Montreal</td>
</tr>
<tr>
<td>Environment</td>
<td>Spokane</td>
</tr>
<tr>
<td>Century 21</td>
<td>Seattle</td>
</tr>
<tr>
<td>Chicago</td>
<td>Century of Progress</td>
</tr>
<tr>
<td>Technology</td>
<td>Tsubuka Brussels</td>
</tr>
<tr>
<td>Peace</td>
<td>Brussels</td>
</tr>
<tr>
<td>Leisure</td>
<td>Brisbane</td>
</tr>
<tr>
<td>World of Tomorrow</td>
<td>New York</td>
</tr>
<tr>
<td>Water/Rivers</td>
<td>New Orleans</td>
</tr>
<tr>
<td>Energy</td>
<td>Knoxville</td>
</tr>
<tr>
<td>Inter America</td>
<td>Hemisphere</td>
</tr>
<tr>
<td>Geographic Society</td>
<td>San Antonio</td>
</tr>
<tr>
<td>Transportation</td>
<td>Vancouver</td>
</tr>
<tr>
<td>Harmony</td>
<td>Osaka</td>
</tr>
</tbody>
</table>

Source: Harrison Price Company.
combine the best features of an exposition, museum and theme park.

2. Form - There was complete agreement that the ERC Center's mission requires that it be open year round, indicating a need for a weatherized form. Herb Rosenthal strongly argued that the advice of Charles Eames be followed by letting the function of the Center dictate its form. There was considerable discussion on the idea of creating a city as a vehicle for the project. It was generally agreed that using the city form has both positives and negatives. The concept of a city is understandable, unique for an attraction, and allows a wide range of thematic development. On the other hand, cities are places where people live, which the ERC Center is not, evolve over time (instant cities are often homogeneous and boring), are based in commerce, and are not covered. It was also noted that an ERC Center "Eurocity" might suffer in terms of scale and scope by analogy to the great cities of Europe. Finally, it was noted that attraction construction is basically stage set development. Facades are for the public while all other structures are "back of the house" and cheaply built. The opinion emerged that the use of some characteristically European urban organizing principles such as a central plaza, and architectural forms could be most useful, but that the ERC Center should not attempt to be a city per se. - the analogy should not be pushed beyond a philosophically acceptable level. Further, forms should be interpretive rather than replicative. Ersatz is to be avoided at all cost. Finally, the mixture of enclosed, covered and open spaces, as found in cities, is thought to be desirable in addressing the weatherization of the Center.

3. European Character - The group was unanimous in its belief that the ERC Center should be entirely European in character and context, not just a European statement of what is found elsewhere. Ignace Graba made the point that Europe
as a single entity does not yet exist - we must invent it. One of the objectives of the ERC Center should be to explain Europe to Europeans, not just foreign visitors. The idea of defining an attraction which is distinctively European proved to be very powerful and conditioned much of the conceptual discussion which followed.

4. **Attraction Value** - It was assumed by all that for the ERC Center to be successful and fulfill its mission it must be developed to the very highest standards and have a substantial critical mass to create attraction value. Nick Winslow pointed out that regardless of the character and nature of the specific project components, attractions must exhibit showmanship if they are to generate popular response, and this needed showmanship can be attained without sacrificing the educational and cultural motivations behind the project.

Central to a discussion of the issue of attraction values is what motivates people to visit major parks, expositions and other attractions. The following reasons for visitation were noted during the charrette:

a. Excitement and fun.
b. Uniqueness.
c. Critical mass of activities.
d. Entertainment value.
e. Environment.
f. Quality and prestige.
g. Fantasy/escape.
h. Perceived good value in terms of time and money spent.
i. Prodding from children.

These factors should be considered in refining the concept and attraction mix for the ERC Center.
5. **Delivery Systems** - As noted earlier it was the consensus of the charrette that the baseline plan relied too extensively on film to convey the thematic messages in the major rides and attractions, although a reasonably wide array of ride and show delivery systems was used. Other presentation techniques should be included such as animatronics, replicas and models, live shows, unique special effects shows (such as Spirit Lodge at the Vancouver EXPO), etc.

6. **Critical Mass** - It was the consensus of the charrette that any revised program required more hourly ride and show capacity to accommodate anticipated visitor peaks, and that more attractions, particularly secondary attractions, were required to achieve the critical mass necessary to meet attendance expectations.

7. **Other Guidelines** - The group agreed on other guidelines to concept refinement, including:

   a. ERC Center should present reality and not be propagandist.
   b. Each presentation should have a point of view.
   c. A balance of emotions should be represented:
      - Excitement
      - Thrills
      - Fantasy
      - Romance
      - Humor
      - Fear, etc.
   d. There should be a balance between winning and losing.
   e. Language differences and the challenge of communication should be dealt with creatively and powerfully.

This input was used as the basis for discussing general organizing principles for a refined ERC Center concept plan.
ERC CENTER CONCEPT ALTERNATIVES

A number of very interesting sets of conceptual guidelines was presented during the charrette which moved the discussion towards the preferred alternative. Those receiving the most attention are briefly summarized below:

- **Renaissance of Europe** - Dirk Verhofstadt made a strong presentation espousing a concept for the ERC Center based on the importance of the EC as the protagonist of a European renaissance for 320 million Europeans. The European Community is a heroic concept and the ERC Center must therefore take on the subject of the EC in a heroic manner. The idea of the EEC as presenter was set forth, with themes of:
  
  - Culture
  - Pride
  - Curiosity
  - Nostalgia
  - History
  - Technology

Herb Rosenthal augmented these with some more organic themes:

- Exploration
- Ideas
- Remembrance of things past
- Creative man
- Well being

- **European Man** - Thyl Gheyselinck refined the renaissance to a set of guidelines revolving around European Man. The intent of this concept was to personalize the ERC Center experience around the values of Self, Society, Philosophy, and Physical Environment. A concept matrix evolved from this discussion:

<table>
<thead>
<tr>
<th>Exploration</th>
<th>Self</th>
<th>Society</th>
<th>Philosophy</th>
<th>Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creativity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Well Being</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nostalgia</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ideas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Physical**
An adaptation of this concept led to a more linear approach:

<table>
<thead>
<tr>
<th>Self</th>
<th>Society</th>
<th>Philosophy</th>
<th>Physical Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>Family</td>
<td>Religion</td>
<td>Land/Water</td>
</tr>
<tr>
<td>Leisure</td>
<td>Community</td>
<td>Metaphysical</td>
<td>Space</td>
</tr>
<tr>
<td></td>
<td>World</td>
<td></td>
<td>Environment</td>
</tr>
</tbody>
</table>

- **Challenge and Response** - Herb Rosenthal proposed to rethink the format in a challenge/response context which focuses on how the EEC is/will deal with the major issues of Europe, including:

  1. Linking/knitting the European countries together.
  2. Protecting the environment.
  3. Feeding Europe.
  4. Communicating in a structure of diverse languages.
  5. Housing the populace.
  7. Reaching the stars.

- **Reaching Goals** - Dominique Mauduit noted that the messages put forth in the ERC Center should be kept simple, and suggested a linear organization of presentation which would treat each subject in terms of the process from starting point to achieving a goal, as follows:

  - Starting point.
  - Potential resources.
  - Eternal forces.
  - Character.
  - Desires.
  - Goals.
Subject matter would include culture, history, diversions, etc.

- **The E.E.C.** - Ignace Graba distilled much of the previous thinking with a conceptual organization which greatly appealed to the group and served as a cornerstone for the preferred alternative. This organization focuses on the great aspects of the EEC in the following manner:

  Europe: The Humanized Nature  
  Europe: The Creator  
  Europe: The Producer  
  Europe: The Explorer (space, seas, health, etc.)  
  Europe: The Community

**PREFERRED ALTERNATIVE: EC: THE COMMUNITY OF MAN**

The preferred alternative, dubbed "E.C. - The Community of Man", synthesizes much of the thinking from both the baseline plan and the concept alternatives described above. This concept invokes the "city analogy" but with a blockbuster EC theme attraction as a centerpiece, surrounded by theme pavilions featuring both major and secondary attractions, and several other features. A schematic plan for the concept prepared after the charrette by Herb Rosenthal is shown in Figure 4. (A color rendering of the scheme is presented in Appendix A). In this scheme the site is expanded to 18 acres oriented around a ceremonial plaza and grand promenade ideal for parades, ceremonies, festivals, etc. The centrum area could be covered like the great arcades of Europe. The Entry Portal is a major architectural statement celebrating each visitor's arrival and receiving them into the ERC Center. The pavilions are free standing architectural statements linked by covered or weatherized circulation corridors. A lake, canals, water course and pools have been added along with a "Pleasure Island" containing an observatory, picnic areas, children's play, and other diversions and activities. "European Streets" form an activity
Figure 4

REVISED SCHEMATIC PLAN

KEY TO SITE PLAN

1. Entry Portal
2. Amphitheater in Ceremonial Plaza
3. EC Community Pavilion: Challenge & Response
4. Ride Station to Producer Pavilion
5. "Europe: The Producer" Pavilion
6. Winter Garden
7. The "European Nature" Pavilion
8. "Europe: The Explorer" Pavilion
10. "E.C. Man" Pavilion
11. Fountain Feature; Main Promenade
12. European Arts & Crafts Center
13. The Streets of Europe
14. Lagoon, Reflecting Pool, Canals
15. Observatory on Pleasure Isle
16. Education Center
17. Verdant Fields, Demonstration Farm Community
texture ringing the major circulation area - open on one side to the landscaped gardens, lake and forests surrounding the site. The Education Center is integrated into the site, yet separated.

The EC Plaza and centrum complex would include the EC Pavilion attraction, the amphitheater, industry exhibit and flexible programming space for seasonal festivals and attractions, exhibits, etc. The EC blockbuster attraction would present "EC - The Community of Man" in the context of challenge/response and the attainment of goals. The thrust would be an upbeat but realistic look at the future of Europe. "Europe is a Winner."

The theme pavilions would carry out Mr. Graba's E.E.C. concept with:

Europe: The Creator
Europe: The Explorer
Europe: The Producer
European Nature
E.C. Man

Possible subject areas for the theme pavilions are shown in Table 5. The Rosenthal scheme includes sufficient area for both major attractions and lots of secondary activities. Also, the plan shows "The Producer" pavilion being reached via a ride that also goes through a glass winter-garden and verdant fields which serve as a demonstration farm project.

It is HPC's opinion that the "E.C. - The Community of Man" concept is exciting and better represents the ERC Center's goals than the baseline plan. This concept, with its increased capacity, should be capable of attracting and accommodating the 3.2 million visitors annually operating on a year round schedule, and should generate a BF800 per capita. Gross in-park spending would then be BF2.56 billion. Using the planning factor of annual gross revenue equaling 50 percent of initial capital cost results in an opening capital budget of BF5.12 billion. An approximation of how the capital cost might be allocated was developed during the charrette as follows:
### Table 5

**PAVILION THEMES FROM "EUROPEAN CENTRE - THE COMMUNITY OF MAN" CONCEPT**

<table>
<thead>
<tr>
<th>Pavilion</th>
<th>Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explorer</td>
<td>Frontiers, People, Technology, Health</td>
</tr>
<tr>
<td>Creator</td>
<td>Ideas, Music, Art, Literature, Cities &amp; Communities - Architecture, ECC, Space</td>
</tr>
<tr>
<td>Producer</td>
<td>Food, Goods/Industry, Entertainment</td>
</tr>
<tr>
<td>Nature</td>
<td>The Land, Flora &amp; Fauna, Preservation of Environment, Recreation, Space</td>
</tr>
<tr>
<td>Community</td>
<td>Nations, People, Communication, Transportation, Government &amp; Politics</td>
</tr>
</tbody>
</table>

Source: Harrison Price Company.
<table>
<thead>
<tr>
<th>Item</th>
<th>Budget (BF billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>BF4.00</td>
</tr>
<tr>
<td>A&amp;E and other fees</td>
<td>0.48</td>
</tr>
<tr>
<td>Contingence</td>
<td>0.40</td>
</tr>
<tr>
<td>Project management</td>
<td>0.20</td>
</tr>
<tr>
<td>Pre-opening costs</td>
<td>0.20</td>
</tr>
<tr>
<td>Total</td>
<td>BF5.28</td>
</tr>
</tbody>
</table>

As noted earlier the design day on-site loading for annual attendance of 3.2 million is 17,000 persons, indicating a need for some 34,000 units of hourly ride, show and other entertainment capacity. The budget allows for a capital expenditure of BF150,000 per unit of hourly capacity, which is extremely tight for a project of this scope and quality. This suggests that the ERC Center should open with a mix of hard and soft attraction capacity to assure adequate budget is available for the major attractions. Using a planning factor of 1.33 units of hourly hard ride and show capacity per design day on-site guest indicates an initial need of 22,600 units of hard hourly capacity and 11,400 units of soft capacity.

The group estimated that of the BF800 per cap, from BF300 to BF400 would be spent on food and merchandise, with 80 percent of this amount being spent on food. Using estimated turnover of $400 per square foot results in an estimated need for between 60,000 and 80,000 square feet of food and merchandise space in the Center, equal to 5,576 to 7,435 m².
Section 4

ERC PARK, ERC VILLAGE AND OTHER PROPOSED FACILITIES

The previous section of this report discussed the baseline concept for the ERC Center and how the charrette team recommended it be refined. Any change in the ERC plan has an important impact on the other components recommended for the ERC Project. This section discusses the other components to the extent they were addressed in the charrette.

ERC PARK

The charrette participants concurred with the finding of the baseline study that a second gated attraction is required to amortize the infrastructure costs of the ERC Project, and offers a potential benefit to the hotels and other proposed visitor facilities. Further, the ERC Center does not, by itself, generate sufficient attendance and spending to justify development of the site to the extent envisioned. For example, if only the ERC Center is built as currently budget, total project cost will be BF110.8 billion (BF14.6 billion as noted in Section 2 less the BF3.8 billion allocated to the ERC Park). This level of investment would require per capita spending of BF1,687 at the ERC Center projected attendance level of 3.2 million using capital budget at twice gross revenue.

As noted earlier, the baseline plan for the ERC Park is for a theme park based on European myths and legends. The charrette team agreed that the proposed theme complemented the ERC Center theme but was concerned that: a) the facility would become "just another fantasy park", 2) would have trouble distinguishing itself from the other major theme parks in the region, and 3) would be difficult to build with adequate thematic quality and integrity for the proposed budget of BF3.8 billion.

The charrette team agreed that an excellent, seasonal theme or amusement park at the ERC Center site had the potential to draw the 2.6 million persons projected in the baseline plan due to the presence of the ERC Center and the other proposed facilities. Annual attendance at this level would result in design day peak on-site visitation of some 17,607 persons, calculated as follows:
Accommodating this level of visitation would require some 35,214 units of hourly ride and show capacity. The budget proposed of BF3.8 billion translates into BF108,000, or $2,700, per unit of capacity. It was HPC's opinion that a quality theme park cannot be built for this budget.

As an alternative to the theme park the charrette group discussed the possibility of building a high quality amusement park which provides an outstanding environment and an extraordinary complement of rides, but does not make the pretense of having any theme but fun and excitement. Ohio's highly successful Cedar Point was mentioned as an example of a comparable park which abuts a summer resort area. A park of this character would be unique in Europe and attract people to the Project who otherwise might not come. It also could be built within the existing budget guidelines. This alternative represents a substantial departure from the baseline and may meet with local resistance. Nevertheless, the consultant group recommended that an ERC Amusement Park be given serious consideration by the client.

The team estimated that the 2.6 million visitors to an ERC Park would spend slightly less than visitors to the ERC Center, about BF720, of which BF400 would be spent on admissions and BF320 of food and merchandise. This level of patronage translates into a requirement for 4,833 m² of food and merchandise space. At 2.6 million attendance and per capita spending of BF720 results in annual gross revenue of BF1.872 billion, which translates into a supportable capital budget of BF3.74 billion.

**ERC Village**

The ERC Shopping Village, which is equivalent to an American festival retail center, is proposed in the baseline plan as a 5,400 m² free-standing facility located between the entrances of the ERC Center and the ERC Park. Of this area, 1,700m² would be devoted to retail shops and 2,700 m² to restaurants. It was noted during the charrette
that a festival center of this size was too small to be a substantial attraction. The experience in the U.S. is that a festival center must be at least 75,000 square feet (6,970 m²) to achieve critical mass.

Both the ERC Center and the ERC Park will generate support for the Shopping Village, but not sufficient support to justify building what is deemed to be the minimum complex. ERC visitors will most likely spend about BF75 per capita, or BF240 million, annually in the shopping village. Spending by ERC Park visitors will be less. The charrette group estimated BF120 million, bringing total shopping village revenues derived from attraction guests to BF360 million. At a turnover of $400 per square foot, total food and merchandise space in the shopping village supportable by park guests is 22,500 square feet, or 2,091 m².

Because of the indicated levels of support by attraction patrons and the fact that other components which will support the shopping village are to be built over an extended period of time, it was recommended that the shopping village be added at a later phase of development. As discussed, a free standing restaurant with a good view of the lake or other Project feature could be built in Phase One on the shopping village site.

OVERNIGHT ACCOMMODATIONS AND OTHER FACILITIES

Because of the importance of the attraction elements to the ERC Project, little time was devoted to discussing the overnight accommodations and recreational amenities in depth. In general, the charrette team was enthusiastic about the prospects for golf and water oriented resort facilities aimed at a wide range of incomes in light of the scarcity of such facilities other than bungalow parks in the Benelux countries, and their potential to complement the major attractions. Comments on specific aspects of the support facilities included the following:

- These was strong agreement that development of a budget motel, like a Days Inn or Motel 6, would be well received and supported.
- Construction of a dedicated resort conference center would be appealing due to the proximity of the site to Brussels and the large
meeting market likely to develop as the EEC continues to grow in importance.

- There may be support for corporate villas or condominiums from companies doing business with the EEC. Golf related residential units would be very appealing to the Japanese.

- The group questioned whether the developers of the bungalow parks would want to locate next to attractions which pull guests out of the parks.

In general, the consensus of the charrette team was that the baseline plan was well conceived and consistent with market potentials.

SITE ORGANIZATION

A major shift in site utilization has occurred since the preparation of the baseline plan, namely, the relocation of the football stadium to a site which does not constrain the area for attraction development. In addition, the charrette recommended the postponement of shopping village construction. These changes led to a discussion of where the ERC Center, the ERC Park and the Shopping Village should be developed on the site. It was the consensus of the charrette that because of its commanding importance to the Project, the ERC Center should be made the central feature of the core project, occupying the site of the ERC Park. The ERC Park would be moved to the current site of the ERC Center or to a location behind the Center, depending on site planning considerations. The shopping village would be relocated to the east of the ERC Center to get closer to the resort hotels and to capitalize on the lake views. Parking would remain in the same location.

MAKING THE PROJECT SUCCESSFUL

The charrette team offered a number of suggestions on how to make the core project successful, as follows:

1. Aim for the highest standards in design and execution.
2. Formulate a strong and aggressive marketing plan, and implement it early.

3. Seek publicity through radio, television and the press.

4. Control construction costs by eliminating the over-control and duplication of effort which has produced unsatisfactory results in France.

5. Keep the Project immaculate.

6. Provide an adequate budget to beautifully landscape the Project.

7. Keep all facilities looking fresh by painting frequently.

8. Maintain quality control standards to assure good food.

9. Provide facilities and incentives for groups and parties.

10. Add night time activities.
Section 5

IMPLEMENTATION

The charrette team briefly discussed the short term steps that must be taken to advance the project. These roughly coincide with the client's own organization approach of separating the responsibilities among three teams - creative, development and management.

CREATIVE TEAM - CONCEPT REFINEMENT

The next steps that need to be taken include:

1. Articulate the revised concept if accepted.
2. Write preliminary scripts for all attractions.
3. Define what delivery systems are appropriate for each script/attraction.
4. Prepare a schematic plan for the attraction.
5. Prepare a capacity analysis and flow/circulation plan for the facility.
6. Define the overall program.

DEVELOPMENT TEAM - ECONOMIC PLANNING AND TESTING

Working in concert with the other teams, the development team would prepare the following:

1. A update of the economic plan.
2. Define and establish the economic performance guidelines for Project profit centers.
3. Establish appropriate sizing guidelines for all facilities based on attendance patterns, user needs, project economics, etc.
4. Prepare a phasing program based on projected attendance and spending, critical mass needs, cross-use of facilities, capital costs, etc.
MANAGEMENT TEAM - IMPLEMENTATION PLANNING

The project management team working within KS would be responsible for:

1. Assembling the team to design, implement and manage the Project.
2. Supervise and coordinate the creative and development teams.
3. Prepare a detailed project schedule.
4. Begin market and operational planning.
APPENDIX A

REVISED SCHEMATICAL PLAN
COLOR RENDERING