

The economic impact of theme parks on regions



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Critical analysis on the economic, social and environmental impact of theme park on regions based on Michael Braun's article of NEURUS (– participant 1999/2000(UCI – WU).
Analytical description of case studies: Expansion of Disneyland in Los Angeles, Designing of Istanbul Theme Park and Ankara Kingdom of Wild In Turkey.

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INTRODUCTION

How does the establishment of a Resort park affect the surrounding region? • Is it advantageous for a region to own a Resort park? • How are parks linked to the rest of the region's economy? • How exactly does the park enrich the region economically?

In the following paper will be analyzed the general issues regarding the projecting, expanding, constructing and managing an amusement park and it's effective consequences on local government economy and social life of area's inhabitants.

Afterwards will see this aspects in case study: the expansion of Disneyland resort in Los Angeles, California (costs, management, expected results); Designing and construction of Istanbul Theme Park, Turkey (methods, procedures and expectation); Ankara Kingdom of Wild, Turkey (land management, management problem, social results expectation)

THE ECONOMIC AND SOCIAL IMPACT OF TURISM

Theme parks of a size like Disneyland, Walt Disney World, Knott's Berry Farm, Universal Studios are visited by tourists frequently. The additional spending of tourist dollars in an area affects the economy, that cannot be questioned.

Does tourism introduce costs in the form of reduced quality of life at a destination? The answer is "yes", when the destination is not prepared for such a large number of visitors.

Some of the negative effects are obvious: Traffic congestion, increased crime, noise, air pollution, vandalism, excessive demand on all public facilities, parks, water supplies, not to mention the overcrowding of beaches, mountains, forests, and their destruction.

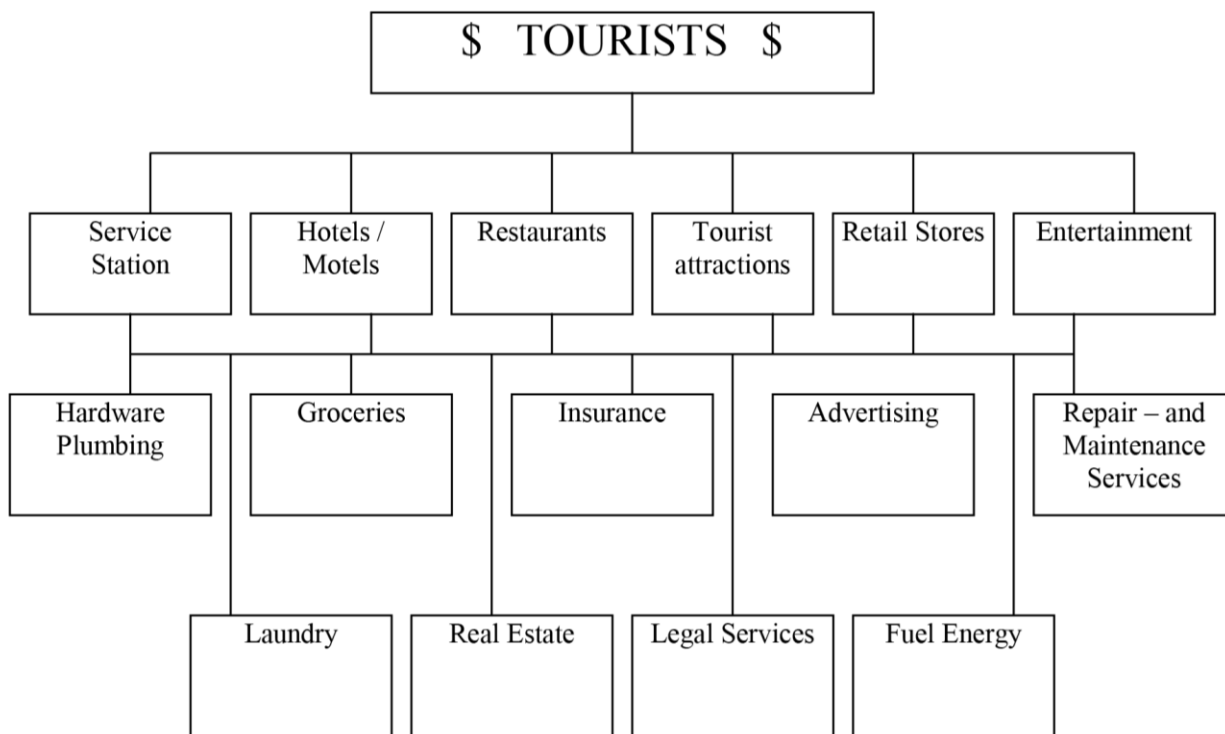
Two sides to tourism

In well-developed areas, tourism may enrich the community. In less developed areas, tourism might lead to frustration and resentment. It is important, that the native population can participate - their position vis-à-vis the tourist accentuates their poverty and may lead to violence (Lundberg, 1995, p144).

The Export basis - multiplier effect

Supposes that the economic basis of a region is the sum of all companies, which export their products into another region. The part of the industry that does not export, depends in its development from the basic sector, but derives from exports and not from government spending.

In economic terms, the tourist dollar is an export that brings in new money. The part that remains in the economy, being spent and respent, sets a "Tourist Income Multiplier". The greater the percentage of the tourist dollar that remains in the economy and the faster it is respent, the greater its effect in accelerating the growth of the economy" (Lundberg, 1995, p148)



Source: U.S. Department of Commerce 1978

Fig a. 1 Economic sectors influenced by the tourist dollars;

This figure shows the influenced economic sectors of a region that serves as a tourist destination. Furthermore, it illustrates the “rounds” of spending. It can be seen clearly, that the initial spending, which is undertaken by tourists, goes into typical services as food, lodging, entertainment, retail stores, etc. In the 2nd round of spending, many more sectors of the region’s economy participate – also economic sectors, whose typical core business is expected to lie elsewhere (e.g. legal services).

IMPACT OF TOURISM ON LOCAL GOVERNMENT EXPENDITURES

Very often, local policy makers have assumed that economic activities associated with tourism improve the quality of life. As such, much of the analysis of this industry has focused on the positive impacts on employment, income, tax revenue, and local economic growth and development, generally.

It is reasoned that promotion of tourism will result in:

- Improved transportation facilities and other infrastructure which will benefit local residents,.
- The generation of enhanced local government revenue which will result in improvement of community facilities and services, and
- The multiplier effect of tourism on development of other economic sectors.

It is also argued that, as a service industry, tourism is able to create a large number of jobs in a short period of time for little cost. It is within this context that the tourism industry has acquired the nickname of being a "smokeless industry."

The general logic behind local government initiatives to promote their region as a tourism center is lying on the assumption that local residents will benefit from the employment, income, and tax revenue generated from tourism. Tourist industry promoters argue that the impact on the local tax base is positive. First, the tourism industry will facilitate expansion of the property tax base through development, which will facilitate stable or declining tax rates.

Second, a large portion of the tax burden may be exported through the use of sales and transient guest taxes paid by tourists. Thus, it would seem possible to import economic development at little or no expense, while at the same time exporting a significant share of the tax burden on local taxpayers (Wong, 1996, p314).

According to Young (1973) there is a saturation level for tourism, if that level is exceeded, the costs of tourism begin to outweigh the benefits. These saturation levels are The Economic Impacts Of Theme Parks On Regions Michael Braun 9 dictated primarily by constraints on land, labor supply, infrastructure capacity, entrepreneurship, and local citizen tolerance, which lead to negative externalities being imposed upon local residents.

Land related constraints include limits on the amount of developable land and the need to preserve natural resources such as climate, land-forms, terrain, flora, fauna, bodies of water, beaches, natural beauty, and water supply for drinking and sanitation which may form the basis of the attractiveness of the area to tourists. In addition, the use of land for tourist development prevents the use of that land for other purposes.

Infrastructure constraints involve heavy use resulting from increased tourism. In order for major tourism development to take place, adequate streets, highways, and parking facilities; air, water, bus, train, and taxi transportation networks; water and sewer systems; utilities; communications networks; parks and recreation;

health care facilities; and public safety systems must be established. In addition, private lodging, eating and drinking, and retail facilities must be adequate.

There may also be limits to the tolerance of local residents to the negative externalities imposed by the tourism industry. Increased tourism may result in overcrowding and congestion on streets and highways, parking lots, public transit, shopping facilities, amusement, entertainment, and sports venues, and other attractions.

Overcommercialization of tourist attractions may result in the loss of uniqueness and authenticity of local customs and culture. Increased tourism may also lead to increased undesired vice activity.

While it is generally conceded that tourism development requires substantial public capital commitments for infrastructure, little attention has been paid to the impact of tourism on local government operating expenditures. To a large extent, it has been assumed that such expenditures would be minimal relative to the additional revenue, which would be generated from the development project. However, it must not be forgotten that tourism development has the potential to impose significant operating costs on local governments in such areas as public safety, transportation, parks and other public facilities, and general administrative overhead.

The basic hypothesis of increased governmental costs induced by tourism cannot be rejected. Local governments should carefully consider both the benefits and costs of tourism development. This is especially critical for communities contemplating jumping on the legalized-gaming bandwagon assuming a quick fix, costless means of revenue enhancement or economic development (Wong, 1996, p.330).

Although it is generally assumed that tourism development will generate positive tax consequences, this is not necessarily the case. One of the possible negative effects is an increased tax burden on local taxpayers to finance tourism. To the extent that local governments are financed predominantly by property taxes, increased real estate values induced by the development of tourism related properties and other costs associated with tourism development will be borne, at least in part, by local residents.

Successful tourism development must focus on balancing the level of tourism activity, which produces the maximum revenue against the costs generated by the tourism effort.

EMPIRICAL TOURIST DATA

According to Smith (1998), travel and tourism is the largest industry in the world in terms of employment, and ranks in the top two or three industries in almost every country in the world by nearly every measure.

For example:

- Travel and tourism employs 101 million people around the globe - one of every 16 workers.
- Travel and tourism employment, investment and value-added exceed those of such major industries as steel, automobiles, textiles, and electronics in virtually every country.
- Consumers in developed countries spend as much on travel and tourism as on clothing or health care.
- Businesses spend at least as much on travel as they do on advertising.



Comparison: tourism in Europe and USA

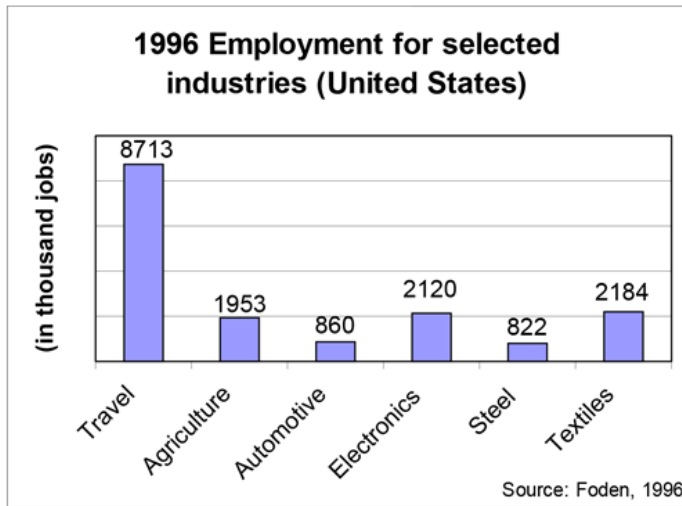


Fig a. 2 Employment for selected industries, US

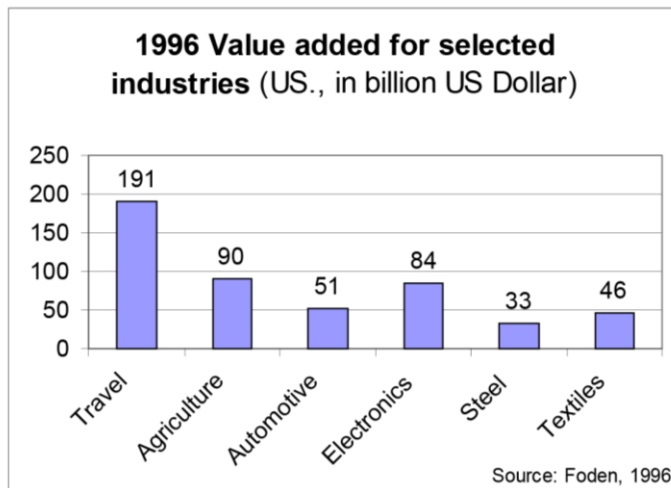


Fig a. 3 Value added for selected industries, US

Europe

Tourism in Europe is a huge industry boasting bright financial statistics.

Last year, it generated revenues of \$1150 billions, or 14 percent of the total gross domestic product (GDP) of the fifteen-nation European Union, according to estimates by the World Travel and Tourism Council (WTC) in London.

It employed 22.2 million people, or 14.6 percent of the EU work force, and invested more than \$245 billion. That makes the EU the world's biggest tourism market, pushing North America into second place (Barnard, 1999,p22.).

France is the world's most popular destination for foreign tourists, attracting 66.8 million visitors in 1997 compared with the US, in second place with 49 million. Spain, Italy, and the United Kingdom occupied the next three places.

And despite economic difficulties, western Germans still lead in per capita tourism spending.

Europe has a head start on most of its competitors thanks to a combination of an unrivaled historical and cultural heritage and a modern service infrastructure.

Walt Disney is planning a second EuroDisney park following the success of its first adventure near Paris.

For some European countries, tourism is an economic lifeline.

In Greece, tourism and travel contributed 19 percent to GDP in 1998 and provides 17 percent of jobs. It also accounts for 24 percent of all capital investments and 30 percent of foreign exchange earnings.

In Central and East European countries, tourism provides an invaluable hard currency cushion to soften the painful transition to a market economy.

In Croatia, it generates 10 percent of the country's GDP.

EuroDisney has become Europe's most popular tourist attraction with 12.5 million visitors in 1998.

THEME PARKS

Background

Disneyland in Anaheim, California, which opened in 1955, is considered the first real theme park. Since then, the theme park industry in the United States has grown dramatically.

The theme park industry is now a \$ 4 billion per year business based on an annual attendance of about 130 million visitors at the 42 largest parks in the U.S.

Moderate-sized parks, with attendance of half a million to a million visitors per year add another \$ 600 million in revenue. Total revenue for the U.S. park industry is estimated at \$ 4.5 billion, making this a major industry. (IAAPA, 1999)

The U.S. theme park industry is by far the largest in the world

Now, major corporate owners in the industry consolidating control are found: Disney, Time Warner (Six Flags), Universal Studios, Anheuser-Busch (Sea World), Paramount (Kings Entertainment). These major corporations control the dominant share of attendance and revenues in the industry. Re-investment is, of course, a key factor in the operation of a park.

Currently, it seems that the U.S. theme park industry is diversifying into new smallscale targeted products for "niche" markets, which may not be covered by the large-scale theme parks (ERA 1998a, p10).

The final point is that many U.S. park developer/owner/operators are looking beyond the U.S. border for future growth markets, including looking at Europe and Asia.

The European Theme Park Industry

In terms of size, Europe's theme park industry has grown to approximately \$1.5 billion in current revenue coming from approximately 19 major parks.

The biggest recent news in Europe was the opening of EuroDisneyland (= EDL) in Paris, which has entertained approximately 13 million visitors.

This impact can be identified in three key areas (ERA 1998a, p13):

- EuroDisney expanded the overall European theme park industry and focused the industry in Paris by having created a multi-park destination attraction complex.
- In a long run, EuroDisney will improve management expertise in the European theme park business. EuroDisneyland will train and create a labor pool of experienced theme park managers, which will in the future help to enhance the performance of the European theme park business as a whole.
- Finally, EuroDisneyland will create the need for proper product positioning to complement Disney in the market area. A variety of target marketing and positioning strategies have proven successful elsewhere in markets shared with Disney parks.

Currently, the United States show 0.46 theme park visits per capita per year, while in the European Community only 0.08 visits per capita are experienced in one year (IAAPA, 1999).

In Japan, development interest in theme park projects has been extremely high following the success of Tokyo Disneyland.

The North Asian Theme Park industry

The theme park industry in Asia is also in a growth mode. Estimates can be found which say that a total of approximately 35 large parks attract attendance of about 71 million visitors, generating a total of nearly \$ 1.5 billion in revenue (U.S. dollars).

Additional 49 moderate-sized parks generate \$ 350 million in annual revenue. The total industry has roughly \$ 1.8 billion in annual revenue (IAAPA, 1999)

Although parks in Japan (particularly the Cities of Tokyo, Kobe and Osaka) dominate these figures, there is high growth potential in other parts of the region, including Korea, Taiwan, Indonesia, and Malaysia.

China does represent a substantial growth area for developing themed amusement parks as well.

Types of theme parks

Recreation parks (municipal parkways, botanical gardens), several spare-time and sport facilities (chair lifts, Tennis courts, Golf courses, etc.) as well as cultural sightseeing sites are tourist attractions as well as attractions for residents, but they cannot be regarded as 'theme parks' in this sense.

This delimitation is deducted by sequential criteria:

- In opposite to recreation and theme parks the mentioned facilities are not regionally closed and do not have a unitary business concept
- In opposite to recreation parks facilities like those mentioned above are mostly run by government or by the municipal administration, what means they are run within the local spare time- and recreation market.

- In opposite to recreation or theme parks, facilities like those mentioned above are just a single part of the whole local recreation infrastructure.

There are two different approaches of how to categorize theme parks: characteristics and hierarchy with respects to economic importance of the parks to the region

Definitions by characteristics:

- Enjoyment parks
- Urban Entertainment Centers
- Sport- and Fun parks
- Theme parks
- Bath parks
- Experience parks

Recreation Parks (collective term)

Recreation parks are plants whose facilities are used for recreation purposes. The design of those facilities does not necessarily need to be the same, there is also no limitation in respects to activities in- and outdoors (it can also be mixed).

Most important criteria is that these facilities stick together spatially and functionally close.

ENJOYMENT PARKS

Contribute actively or passively to the of their visitors. Do not have a certain topic in common; neither do they have a preternatural teaching, sportive or shopping character.

“The Prater” in Vienna is a good example.

URBAN ENTERTAINMENT CENTER

Are mostly indoor built entertainment facilities with a concentration of experience shopping, a thematical gastronomy and entertainment area or a tethered spare-time and overnight stay facility.

The “AEZ” (Vienna, 3rd district) and the “Mall of America”, Minneapolis (USA) are examples of UEC’s.

SPORT- AND FUN PARKS

Areas (in- and outdoors) which contain a mixture of several sport or spare-time facilities.

Example: “SäntisPark”, St. Gallen (Switzerland).

THEME PARKS

Contains facilities of a unitary theme which either spreads around the whole park or only parts (areas, facilities) of the park.

(Examples: Walt Disney World, EuroDisney, Universal Studios)

BATH PARKS

Out- and indoor bath facilities. They derive from traditional baths and are at a higher stage of development, but they are an attraction on their own and therefore have become tourist attractions.

example: “Rogner Dorint Resort Blumau”, Austria



EXPERIENCE RESORTS

Are Hotel- and Bungalow-facilities with a large size of spare time- and experience facilities, which are created for the stay of the visitor only.

Problems in this categorization arise because most of the parks which can be met in empiricism are mixtures of two or more “types” of recreation parks. The example the “SantisPark” in Switzerland. On the one hand, this park is characterized by its Sports- and Fun orientation, but it is a Theme park and features also characteristics of a typical UEC.

Hierarchy

To show the hidden hierarchy, the 20 biggest theme parks in the U.S. shall be related to the number of the local population – the result is a measure of the economic importance of a park to the respective region. Degree of the dependence of the region on the job- and tax revenue-creating characteristic of a theme park could also be used as an information device.

Apart from Disney’s first place (Walt Disney World), which derives from its outstanding number of visitors, we find Parks ranked top which are considered to be “small parks”.

Still, compared to the regional workforce or regional potential employment capacity, it can be seen which parks rule their region as an employer and wage-payer.

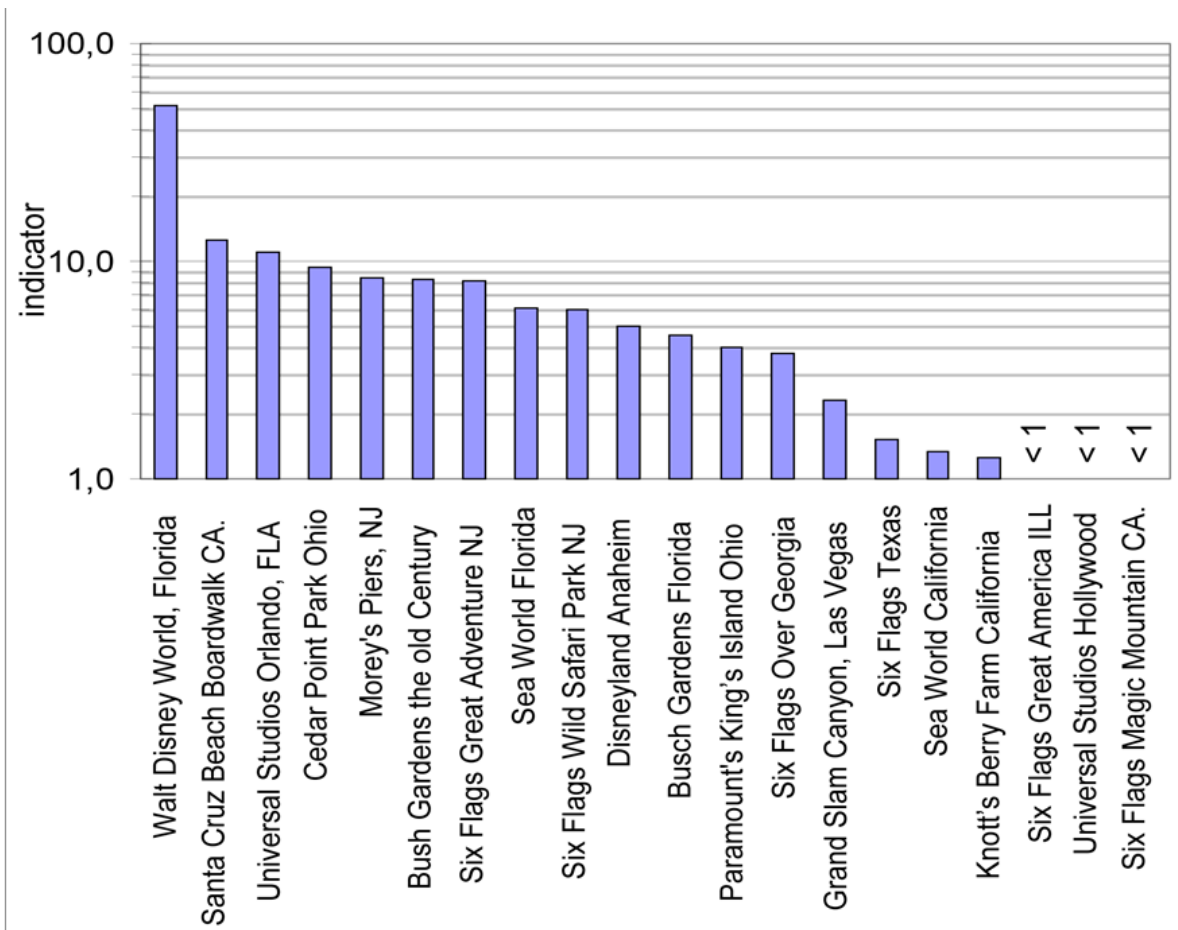


Fig a. 4 Top 20 US theme parks ranked by degree of export orientation

U.S. - Theme park facts in general

General impacts of major parks

Traditionally, destination attractions - and other types of tourist activities - have not been subjects of big attention for economic developers. Economic developers by all means seek job-creating opportunities in the service sector of the industry.

A major destination attraction can have a significant impact on the region where it is located.

Customer catchment area

In the U.S., the locations of theme park sites are no longer demand-oriented, but are chosen by the best accessibility.

Catchment area	Range (up to)	Isochrone (hours to drive)	Percentage of citizens attracted to the park
Primary	50 miles	1 to 1,5 hours	20 – 45 %
Secondary	100 miles	Up to 2 hours	10 – 15 %
Tertiary / Tourist	150 miles +	-	1 – 11 %

Fig a. 5 Customer catchment area

(Source: Benesch, 1989, p. 55)

Attendance 1998 and market structure

Owner / Carrier	Number of parks run by owner	Attendance 1998
Walt Disney Company	5 (WDW are 4 separate parks)	55.3 millions
Premier parks / Time Warner	25	34.8 millions
Anheuser – Busch	9	20.4 millions
Universal Studios Inc.	5	18.5 millions
Cedar Fair Ltd.	8	13.7 millions
Paramount Parks	6	12.9 millions
Silver Dollar City Inc.	5	5.2 millions

Source: Amusement Business Magazine 1998, p. 81

Fig a. 6 Theme park industry market structure

The market structure of major theme parks in the U.S. can be called an oligopoly.

Participating players are several Companies like Banks, Oil Companies, Insurance Companies and Companies of the entertainment (movie and broadcasting) industry. The U.S. theme park market is highly concentrated, which can be seen from the figure below:

Rank	Park	Operator/Owner	Location	Attendance 1998 (millions)
1.	Walt Disney World, Orlando	Walt Disney Company	Florida	41.7
2.	Disneyland Anaheim	Walt Disney Company	California	13.7
3.	Universal Studios Orlando	Universal Studios Inc.	Florida	8.9
4.	Universal Studios Hollywood	Universal Studios Inc.	California	5.1
5.	Sea World Orlando	Anheuser-Busch Corp.	Florida	4.9
6.	Busch Gardens Tampa	Anheuser-Busch Corp.	Florida	4.2
7.	Sea World San Diego	Anheuser-Busch Corp.	California	3.7
8.	Six Flags Great Adventure NJ	Premier Parks / Time Warner	New Jersey	3.4
9.	Knott's Berry Farm California	Cedar Fair Management Ltd.	California	3.4
10.	Cedar Point Park Ohio	Cedar Fair Management Ltd.	Ohio	3.4
11.	Paramount's King's Island Ohio	Paramount Parks	Ohio	3.4
12.	Six Flags Magic Mountain, Valencia	Premier Parks / Time Warner	California	3.1
13.	Santa Cruz Beach Boardwalk California	Sta. Cruz Seaside Comp.	California	3.0
14.	Six Flags Great America	Premier Parks / Time Warner	Illinois	2.9
15.	Six Flags Texas	Premier Parks / Time Warner	Texas	2.8

Fig a. 7 theme park attendance numbers

Biggest theme park operators

Though disposing over 5 theme parks only, the Walt Disney Company exceeds the attendance numbers of the second largest competitor by almost 60 %.

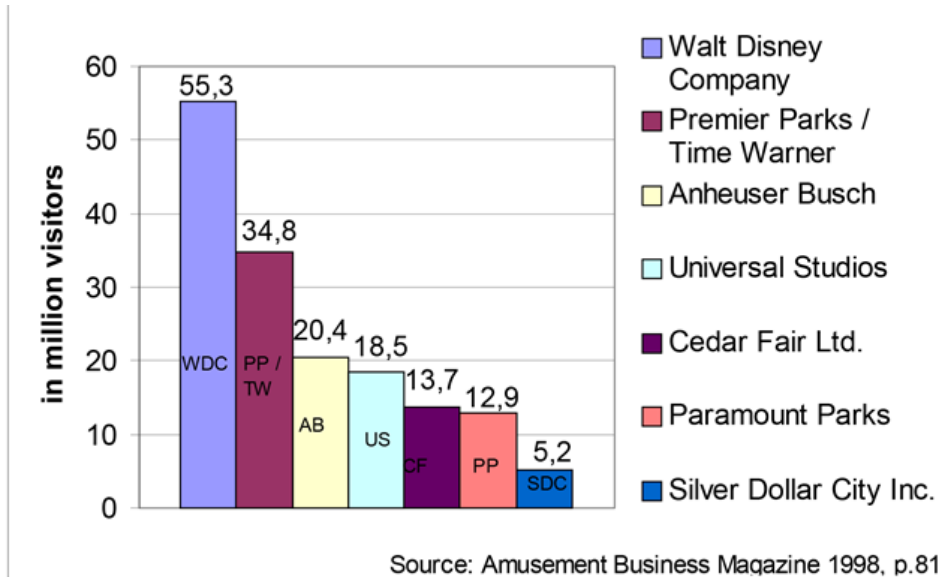


Fig a. 8 Biggest theme park operators US

With just 9 theme parks worldwide, the Disney Company puts the Premier Parks/Time Warner Company with 31 parks in second place.

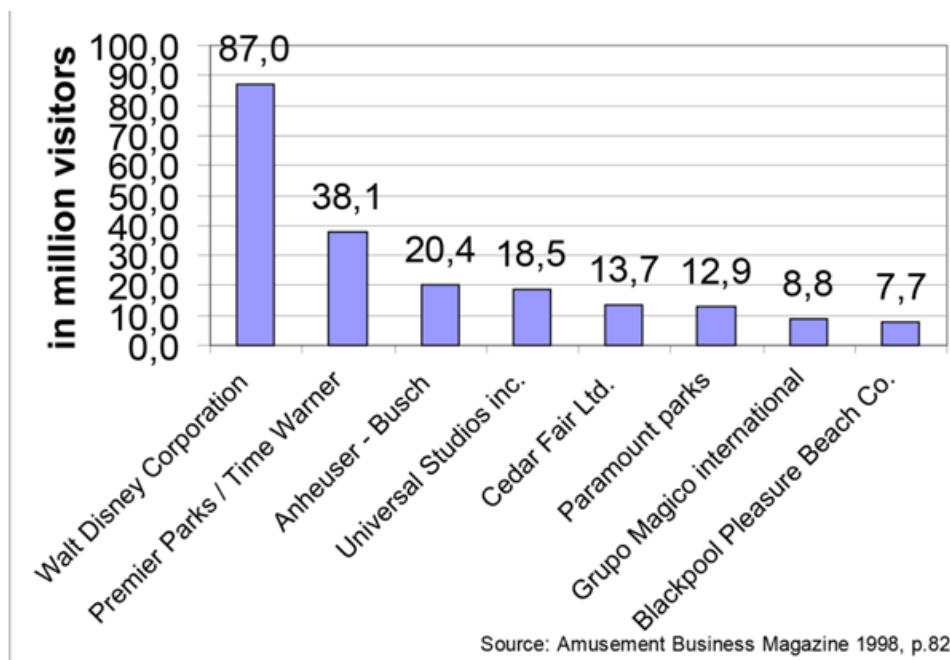
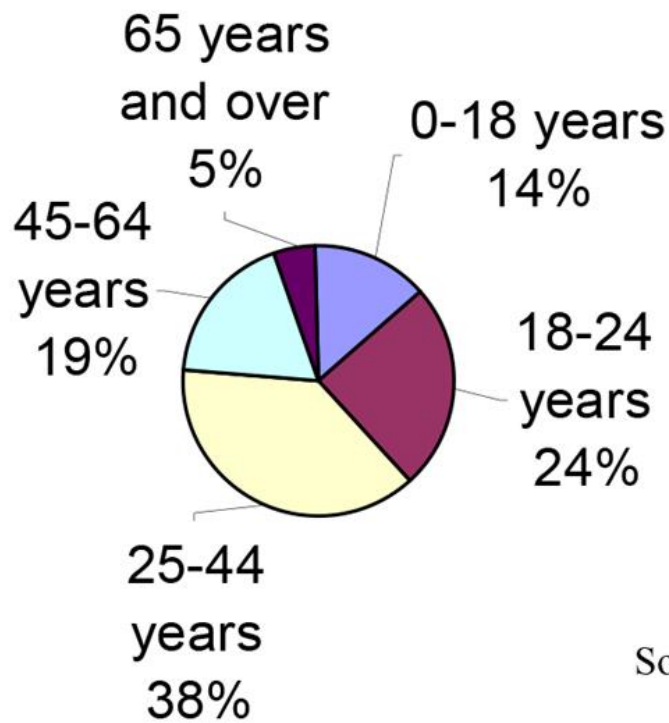


Fig a. 9 Biggest theme park operators worldwide

Age distribution of U.S. theme park visitors

Most theme parks have young families as their target group - that could be a reason, why the share of 25-44 year old visitors in relation to the total number of visitors is the highest in the statistics (if considered a family consisting of two adults with only one child).



Source: Benesch, p.141

Fig a. 10 Age distribution of theme park visitors

THE AMUSEMENT PARK INDUSTRY

A BRIEF HISTORY

The roots of the amusement park industry go back to medieval Europe when pleasure gardens began to spring up on the outskirts of major European cities. Pleasure gardens remained extremely popular until the 1700's, when political unrest caused many of these parks to close. However, one of these parks remains: Bakken, north of Copenhagen, which opened in 1583 and now enjoys the status of the world's oldest operating amusement park (Kyriazi, p.14).

The second oldest amusement park is to be found in Vienna, Austria. The "Prater", as it is called, was erected in 1766.

In the late 1800's, the growth of the industry shifted to America. Following the American Civil War increased urbanization gave rise to electric traction (trolley) companies. As a result, the transportation companies looked for a way to stimulate weekend use, or weekend ridership. This resulted in the amusement park. Typically built at the end of the trolley line, amusement parks initially were simple operations consisting of picnic facilities, dance halls, restaurants, games, and a few amusement rides often located on the shores of a lake or river. These parks were immediately successful and soon opened across America (Kyriazi, textual).

The amusement park entered its golden era with the 1893 World's Colombian Exposition in Chicago. This World's Fair introduced the Ferris Wheel and the amusement midway to the world. The following year, Capt. Paul Boynton borrowed the midway concept and opened the world's first modern amusement park - Paul Boynton's Water Chutes on Chicago's South side. The success of his Chicago park inspired him to open a similar facility at the fledgling Coney Island resort in New York in 1895 (Kyriazi, textual).

Around the world, hundreds of new amusement parks opened, while many early trolley parks expanded by adding new rides and attractions. New innovations provided greater and more intense thrills to the growing crowds. By 1919, over 1,500 amusement parks were in operation in the United States. Unfortunately, this development did not last for long (Kyriazi, textual)

In 1929, America entered the economic depression, and by 1935 only 400 amusement parks remained; many struggling to survive., but with the end of World War II, America and the amusement park industry enjoyed post war prosperity.

When Disneyland first opened in 1955, many people were sceptical that an amusement park without any of the traditional attractions would succeed. But Disneyland was different. Instead of a midway, Disneyland offered five distinct themed areas, providing "guests" with the fantasy of travel to different lands and times. Built at a cost of USD 17 million, Disneyland represented the largest investment for building an amusement Park that had been made up to that time. During the first season, a crowd of 3.8 million visitors was registered.

As the 1980's dawned, the theme park boom began spreading around the world. Meanwhile, theme park growth slowed considerably in the United States due to escalating costs and a lack of markets large enough to support a theme park (Kyriazi, textual).

During the 1990's, the amusement park remains an international favorite. Rides are taking advantage of technology to reach heights and speeds that thrill seekers only dreamt about not too long ago.



Name of Park		Location		Founded
1.	Bakken	Klampenborg	Denmark	1583
2.	The Prater	Vienna	Austria	1766
3.	Blackgang	Chine Cliff Top, Ventnor	UK	1842
4.	Tivoli	Copenhagen	Denmark	1843
5.	Lake Compounce Amusement Park	Bristol, CT	USA	1846
6.	Hanayashiki	Tokyo	Japan	1853
7.	Grand Pier	Teignmouth	UK	1865
8.	Blackpool Central Pier	Blackpool	UK	1868
9.	Cedar Point	Sandusky, OH	USA	1870
10.	Clacton Pier	Clacton	UK	1871
11.	Idlewild Park	Ligonier, PA	USA	1878
12.	Sea Breeze Amusement Park	Rochester, NY	USA	1879
13.	Skegness Pier	Skegness	UK	1881
14.	Grona Lund Tivoli	Stockholm	Sweden	1883
15.	Dorney Park	Allentown, PA	USA	1884
16.	Coney Island	Cincinnati, OH	USA	1886
17.	Pullen Park	Raleigh, NC	USA	1887
18.	Beech Bend Park	Bowling Green, KY	USA	1888
	Geauga Lake	Aurora, OH	USA	1888
20.	Arnold's Park	Arnold's Park, IA	USA	1889
21.	Carousel Gardens - City Park	New Orleans, LA	USA	1891
22.	Conneaut Lake Park	Conneaut Lake Park, PA	USA	1892
	Columbian Park	Lafayette, IN	USA	1892
24.	Trimper's Rides and Amusements	Ocean City, MD	USA	1893

Fig a. 11 World's oldest theme parks (1)

Name of Park		Location	Founded
	Whalom Park	Fitchburg, MA	USA 1893
26.	Lakemont Park	Altoona, PA	USA 1894
27.	New Walton Pier	Walton-on-Naze	UK 1895
28.	Widam Park	Budapest	Hungary 1896
	Blackpool Pleasure Beach	Blackpool	UK 1896
	Waldameer Park	Erie, PA	USA 1896
	Lagoon Park	Farmington, UT	USA 1896
32.	Takarazuka Familyland	Takarazuka	Japan 1898
	Mumbles Pier	Mumbles	UK 1898
	Village Park	Old Orchard Beach, ME	USA 1898
	Midway Park	Maple Springs, NY	USA 1898
	Kennywood	West Mifflin, PA	USA 1898
37.	Tibidabo	Barcelona	Spain 1899
	Toledo Zoo	Toledo, OH	USA 1899
39.	Vollmar's Park	Bowling Green, OH	USA 1900
40.	Brighton Palace Pier	Brighton	UK 1901
41.	Brittania Pier	Great Yarmouth	UK 1902
	Canobie Lake Park	Salem, NH	USA 1902
	Camden Park	Huntington, WV	USA 1902
44.	Bushkill Park	Easton, PA	USA 1903
45.	Grand Pier	Weston Super Mare	UK 1904
	Keansburg Amusement Park	Keansburg, NJ	USA 1904
47.	Oaks Amusement Park	Portland, OR	USA 1905
	Carousel Village- Williams Park	Providence, RI	USA 1905
49.	Frontierland	Morcambe	UK 1906
50.	Toshimaen Park	Koyama	Japan 1907
	Santa Cruz Beach Boardwalk	Santa Cruz, CA	USA 1907
	Clementon Amusement Park	Clementon, NJ	USA 1907
	Lenape Park	Mays Landing, NJ	USA 1907

Fig a. 12 World's oldest theme parks (2)

MAJOR THEME PARKS REQUIREMENTS AND PROBLEMS

Major theme parks requirements

The basic requirements that must be satisfied for a major theme park are summarized in the following table:

Destination attraction basic requirements
• Adequate market within 100 –200 miles with sufficient disposable income
• Large site (100 – 400 acres and more)
• Excellent access to site (traffic)
• Appropriate zoning
• Available supply of part-time workers
• Acceptable weather (must be able to operate at least 140 days a year)

Source: Foden, 1996

Fig a. 13 Destination attraction basic requirements

Key to a successful theme park is an adequate market within 100 to 200 miles, consisting of a population with adequate disposable income to afford the required expenditures. The bulk of the attendees at theme parks are day-trippers and, in fact, successful theme parks require repeat business, which is most likely to come from day-trippers. Disneyland and Disneyworld are exceptions to this distance requirement in that each has either broad regional or national and in the case of Disneyworld, international--appeal.

An adequate site is critical. A site of 100 acres or more is necessary to provide not only the attraction itself, but also parking, buffer zones and expansion. The land should be rolling to permit attractive landscaping and changes in elevation to mask exhibits and rides, although level sites, with proper inward-looking design, can work as well. Access to the site is important because of the need to tap markets from which attendees can arrive by express highways, with minimum delay to arrive at the site.

Appropriate zoning of the site is critical. A long drawn-out battle to change zoning classification is highly undesirable. The theme park developer has no interest in becoming involved in a battle for zoning change.

Requirements to impact destination tourism

Having a theme park does not automatically insure an influx of tourism. To impact destination tourism, a theme park must (ERA 1998a, p.9):

- **Be unique, a "must see" destination.** This can be accomplished through character development (Mickey and his friends), architectural form, natural features, special events and programming (Opryland) or a combination thereof.
- **Have large scale and a critical mass of attractions.** Investment levels to impact international tourism generally must exceed U.S. \$150 million.
- **Combine high technology with human scale and quality service.** Investments in the thrill hardware must be combined with a high level of service from the "hosts and hostesses" so that a unique local culture and friendly human contact is balanced to the high technology.
- **Encourage overnight stays.** The principal economic benefits of tourism come when overnight stays are generated. Day visitors or tourists who stay with friends and relatives generate only 20 percent of the economic impact of tourists staying in hotels and motels (\$50 versus \$250 per day). Thus, in designing a theme park for tourism, a multiple attraction destination (with experiences that can occupy two or three days) is more likely to have the desired impact.
- **Have complementary destination activities.** Tourist-oriented theme parks should be part of a mix of recreation and leisure activities. A true tourist destination would also have supporting recreation uses such as high quality hotels, convention and conference facilities, resorts, recreational shopping and dining experiences, and sports activities including golf, tennis, and water-related activities, and excursions into nearby local tourism areas.
- **Support media (TV) coverage and exposure.** Like most other things in life, future theme parks must be designed for television. The use of theme parks and resorts as backdrops for variety programs, celebrity games, sports competition, and convention/conference broadcasting is increasing rapidly and the resultant TV exposure is very important in creating awareness in tourism markets.

Given that these criteria are part of the theme park/tourist destination program, the results can be dramatic and provide a sustaining economic base. For example, at Walt Disney World, tourism increased from 2.8 million visitors in 1970 to over 35 million by 1992.

Major theme parks problems

Theme parks as destination attractions – Problems to be addressed
• Need for larger site (100 –400 acres depending on concept)
• Traffic
• Large amounts of water required
• Seasonability in employment in most areas
• Lower wages

Fig a. 14 Theme parks as destination attractions- problem to be addressed;

Successful destination attractions and their ancillary development require large sites with top-notch access. A site of at least 100 to 200 acres, and possibly up to 300-400 acres may be required.

The availability of large amounts of water is another potential problem for some areas. theme park rides, as well as overall ambience, often require large volumes of fresh water, which may be difficult to ensure at a particular location.

The seasonality of employment, an asset in some areas with large college or military establishment personnel, may be a detriment to some areas, which are seeking permanent, year-round employment. Similarly, the lower wages associated with the parttime/ temporary employment at most facilities may be undesirable, although in other areas the employment opportunities may represent a real opportunity to meet a need.

CASE STUDY: DISNEYLAND EXPANSION

To analyze the impacts theme parks have on regions in detail, a case study shall be done. While analyzing the Disney Company's attempt to expand the existing Theme Parks in Anaheim, CA, and the impacts from running and expanding the Theme Park closely, it shall also be shown that the Disney Corp. is not only a world leader in Theme Parks but a leader in the entertainment industry in general.

The Walt Disney Company - A brief introduction

The Walt Disney Company was founded in 1922, and has become a world leader in family Entertainment. Today, the company is operating on a multinational level, has over 65,000 employees worldwide and over 189,000 shareholders. It is organized and divided into 3 sections of businesses:

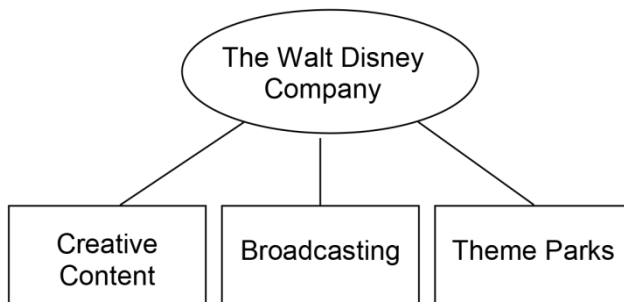


Fig. b. 1 Business units of Walt Disney Company

Business Unit Creative Content

The Creative Content BU consists of following business fields: "The Buena Vista Internet Group" (Infoseek), "The Fairchild Publications", the Television Production / Distribution.

It has to be noted, that the most important sections of this BU are the "Walt Disney Studios" (Miramax, Home Entertainment, Theatrical Films, Buena Vista Music Group, Network TV Production) and the "Consumer Products" (Merchandise Licensing, The Disney Store, Disney Publishing, Disney Direct Marketing, Disney Interactive, etc.) (Source: The Walt Disney Company: "1998 Fact Book", p.4).

Business Unit Broadcasting

As the name speaks for itself, this business unit covers "ABC Radio Networks", "ABC Television Network" and "Cable Networks & international" (ESPN, Disney Channel, Toon Disney). (Source: The Walt Disney Company: "1998 Fact Book", p.12)

Business Unit Theme Parks and Resorts

The "Walt Disney Imagineering" and the "Disney Regional Entertainment" (Club Disney, DisneyQuest, ESPN Zone) belong to this unit as well as the "Anaheim Sports" unit (The Mighty Ducks of Anaheim, The Anaheim Angels). Major component of this business field are – of course – the "Walt Disney Attractions" containing "The Disneyland Resort", "Walt Disney World Resort", "Disney Vacation Club", "Disney Cruise Line" and "Tokyo Disney" (Source: The Walt Disney Company: "1998 Fact Book", p.15)

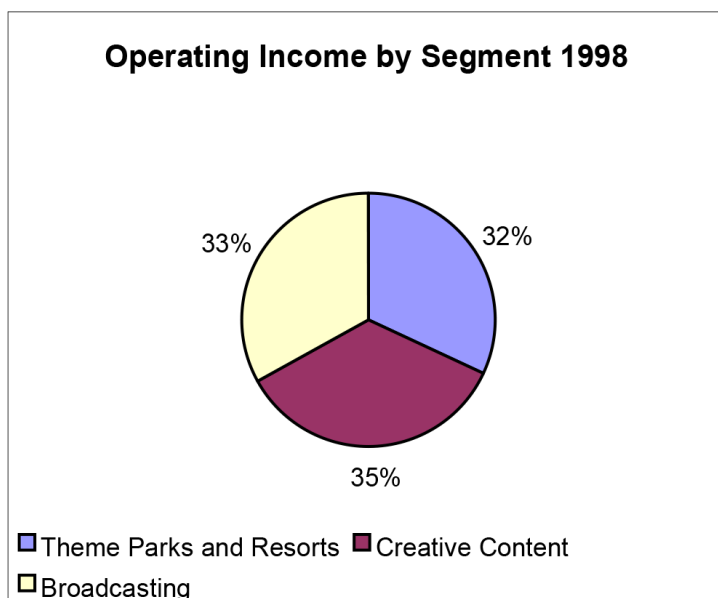
Financial Key Numbers and Ratios

Business Segments	1996	1997	1998
Revenues (in million USD)			
Creative Content	\$ 10,159	\$ 10,937	\$ 10,302
Broadcasting	\$ 4,078	\$ 6,522	\$ 7,142
Theme Parks and Resorts	\$ 4,502	\$ 5,014	\$ 5,532
Total Revenue	\$ 18,739	\$ 22,473	\$ 22,976
Operating Income (in million USD)			
Creative Content	\$ 1,561	\$ 1,882	\$ 1,403
Broadcasting	\$ 782	\$ 1,294	\$ 1,325
Theme Parks and Resorts	\$ 990	\$ 1,136	\$ 1,287
KCAL Gain	-	\$ 135	-
Accounting Change	(\$ 300)	-	-
Total Operating Income	\$ 3,033	\$ 4,447	\$ 4,015

Source: Annual Report of the Walt Disney Company, 1998, p.70

Fig. b. 2 Financial Keys and Numbers

It is interesting that the operating income by segment is distributed almost evenly in 1998:



Annual Report of the Walt Disney Company, 1998, p.10

Fig. b. 3 Operating income by segment

As can be seen clearly, the company's operating income was contributed by the 3 individual business segments in nearly equal measure. With the exception of the theme park – business unit, growth rated in operating income lagged behind historical trends, which is reasoned with increased cost pressures and, of course, the difficult economic conditions in 1998.

The following figures illustrates the financial status of the Disney Company. The capital structure shows high ratios of liquidity and considered all the numbers, Disney Corp. can be considered as an extremely wealthy corporation.

Characteristic data:

Characteristic data	1996	1997	1998
Operating Performance			
Operating Income/ Total Revenue	17.5 %	19.0 %	17.5 %
Income before Income taxes/Total Revenues	12.8 %	14.1 %	13.7 %
Net income / total revenues	7.3 %	8.2 %	8.1 %
Return on Investment			
Net income / Avg. Stockholder's equity	9.2 %	10.6 %	10.1 %
Net income / Average Total Assets	4.0 %	4.7 %	4.6 %
Capital structure			
Borrowings / Avg. Stockholder's equity	78.2 %	66.3 %	63.7 %
Borrowings / Avg. Total Book Capitalization	33.5 %	29.2 %	29.3 %
Borrowings / Total market Capitalization	29.0 %	20.5 %	22.5 %
Debt Service Coverage			
Income before Net Interest and Taxes / Total Interest Cost	4.7 x	5.4 x	6.1 x
Income before net interest, depreciation and Amortization / Total Interest cost	6.1 x	7.1 x	8.1 x

(Source: The Walt Disney Company: "1998 Fact Book", p17)

Fig. b. 4 Characteristic data

It can be seen clearly, that Disney gains a higher profit from its "Merchandise, Food & Beverages sales" than the company does from admission fees.

The following graph depicts the average visitor spending trend for all Disney parks.

Development of average per capita visitor spending

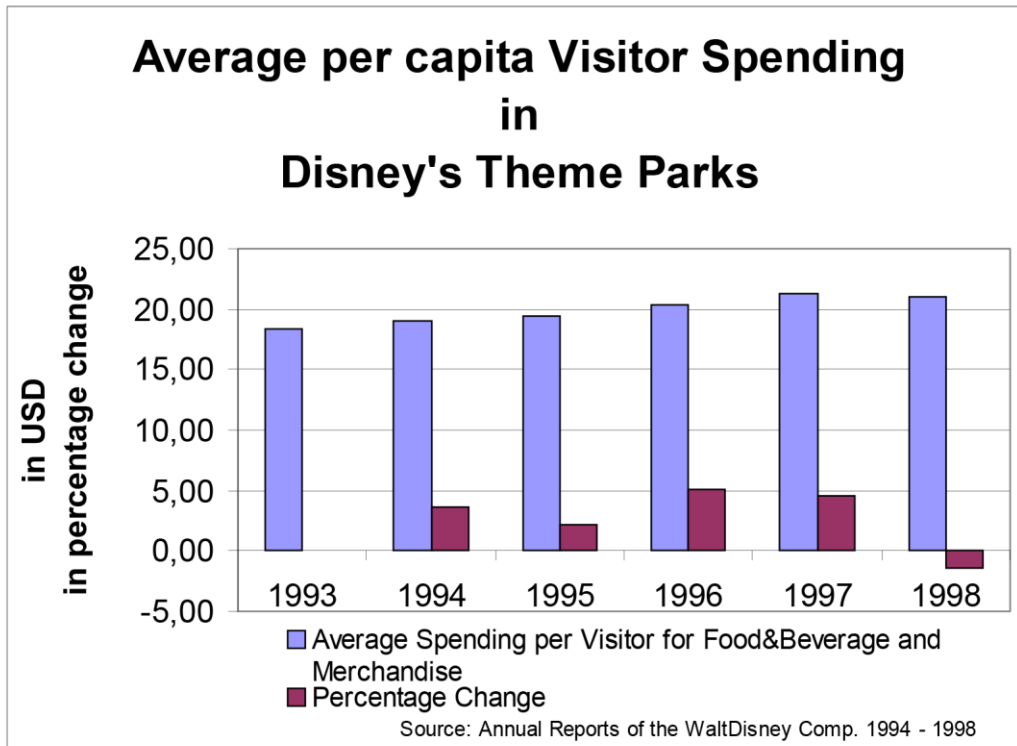


Fig. b. 5 Development of average per capita visitor spending

Current expenditures per person at Disneyland are USD 21.04. Expenditures at Disney's California Adventure (which will be subject of a detailed analysis later in this paper), which has a substantial number of retailing and dining opportunities at a slightly higher level than the current park, are estimated at USD 23.6 per person, which is 12 percent above those at Disneyland (PKF Consulting, p29).

An Analysis of the company's status

The company has been able to grow over a long period of time, and has developed from within the departments of Research and development, marketing, and finance. By relying on past experience, company officials know to a large extent what the target customer wants.

The bargaining power of customers is high in the service and in the entertainment industry. Since a large number of customers are needed to make Disney's operations run smoothly, the customers have certain powers. For instance, if the price on a particular home video is too high, customers may be reluctant to spend the money needed to purchase the product.

The bargaining power of suppliers is moderate. As the Disney Company is operating in a highly differentiated and unique industry with high switching costs associated with operations, the suppliers are dominated by a few companies and are most probably very concentrated.

A multinational corporation such as the Disney Company faces internal weaknesses and strengths, which can, to a certain extent, be controlled. The external forces such as opportunity and threats are more difficult to control, and Disney has to adopt and take advantage to those forces.

Disney's main strength is in its resources and in the experience in the business. The company clearly has developed a very strong and well-known "brand-name" over many years. Disney has also been able to diversify its operations and products to hedge against decreasing sales in product lines. In recent years it has diverted into Home Video, Film, merchandise, Radio broadcasting, Network television and of course in theme parks. It has also effectively globally diversified its operations from USA to Japan and Europe.

Corporations always have internal weaknesses, and in Disney's case they are:

- A very large work force, In 1991, the company had 58,000 employees. This fact represents possible communications problems, and a high level of bureaucracy within the corporation. By diversifying into more businesses and niches, the company's work force will grow even larger, and the organizational structure has to be able to support an expansion of the work force.
- frequent change in top-management.
- High overhead expenses. (Source: Interview 1). Are usually direct effects of a large work force and a large number of fixed assets.

Major threats to the Disney Company include the following:

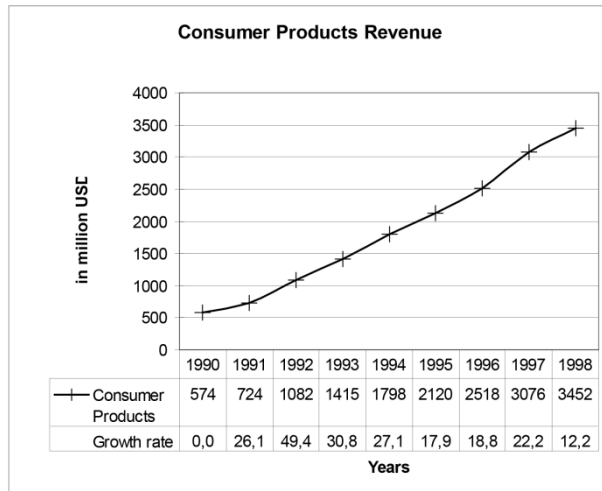
- Over saturated markets. As the supply of services and products in the entertainment industry is starting to saturate the markets, competition will be more intense, and only the most powerful companies will be able to survive.
- politics and economic aspects from a global perspective, and
- Foreign competition. (Source: Interview 1)

Disney has leveraged this risk to a certain extent as it has diversified and globalized its operations, but still, the company is in the service/entertainment business. Some of its operations, such as the Network-television division may not be able to handle the pressure from the Cable-giants such as Turner Broadcasting Systems (TBS).

Competition is always a threat to a company. Even though that the entrance barriers are relatively high in the niche in which the company is operating in, the threat of new competition cannot be excluded.

The corporate strategy is clearly focusing on diversifying its products and services. Rapid expansion overseas and an increase in the product and service mix have created an umbrella effect. Thus, risks have been minimized. If one product line fails, other product lines will cover-up for its losses.

Regarding the chart below, it should not cause any astonishment that the Walt Disney Corporation is by far the biggest theme park operator in the world. Note that they count more than the double visitor number than the second largest operator in the world.



Source: Annual Reports of the Walt Disney Company, 1994-1998

Fig. b. 6 Development of consumer products revenue

Visitor numbers biggest theme parks

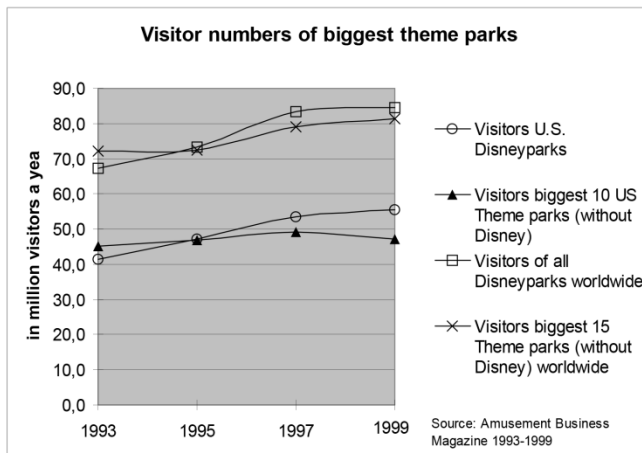


Fig. b. 7 Visitor numbers of biggest theme parks

Visitor numbers biggest theme park operators

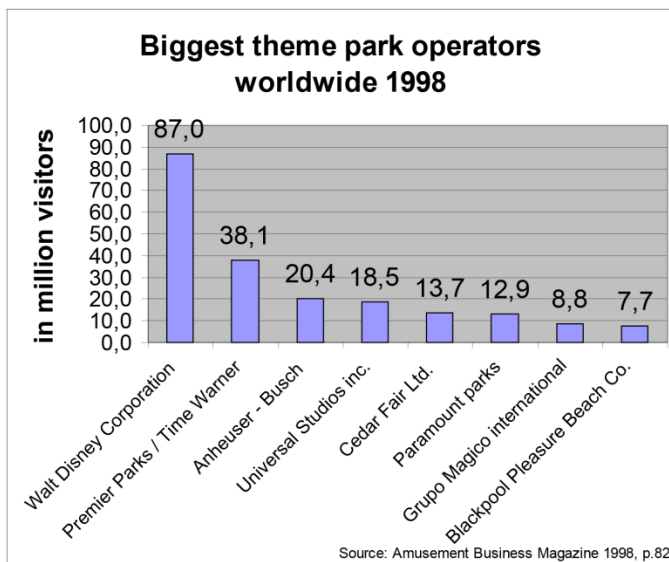


Fig. b. 8 Visitor numbers biggest theme park operators

Source: Amusement Business Magazine 1998, p.80

Introduction of the Case-study project

The USD 1.4 billion Disneyland Resort expansion will include a new theme park (Disney's California Adventure), a new 750-room deluxe resort hotel (Disney's Grand Californian Hotel), and the "Disneyland Center", a new retail dining and entertainment esplanade, which is supposed to accelerate new economic growth for Anaheim, Orange County and Southern California (Disney Corp., 1996a) .

As planned, Disney's California Adventure will offer the following themed districts:

- The Hollywood / Beverly Hills area
- A beachfront boardwalk area
- A wilderness area
- A working farm and a farmer' Market / manufacturing area showcasing California's products.

Theme park district:

The theme park district is the largest of the land use areas and includes approximately 292 acres. The theme park District will include the existing Disneyland theme park (136 acres), a new theme park called "Disney's California Adventure" and associated ticketing areas and pedestrian circulation areas (147 acres), and the new Disneyland administration building (9 acres). (EIR #311, V.1, p 4-34)

Hotel district

The hotel district is the second largest area within the Disneyland Resort and covers approximately 97 acres. The Hotel District is intended for hotels, meeting room space, accessory retail, recreational uses (e.g. pools, tennis, courts), landscaped areas and parking facilities (EIR #311, V.1, p 4-34).

Parking District

The 76 acres Parking district consists primarily of two major parking lots, which have easy access to the Interstate 5. Together, the parking lots contain 34,400 spaces (EIR#311, V.1, p 4-34).

Future Expansion District

The 81 acres future expansion district will accommodate a possible future expansion of the Disneyland Resort.

The purpose of the expansion is to create an international, multi-day vacation destination, which integrates existing and future theme parks, hotels, and other visitor-serving facilities in proximity to each other. The 546 acre- Disneyland Resort will include a number of opportunities for shopping, dining, amusement, and recreational activities that will change the site from a single-day visit destination to a multi-day attraction. Since many guests will extend their length of stay, incremental vehicle trips to and from the area are expected to be reduced.

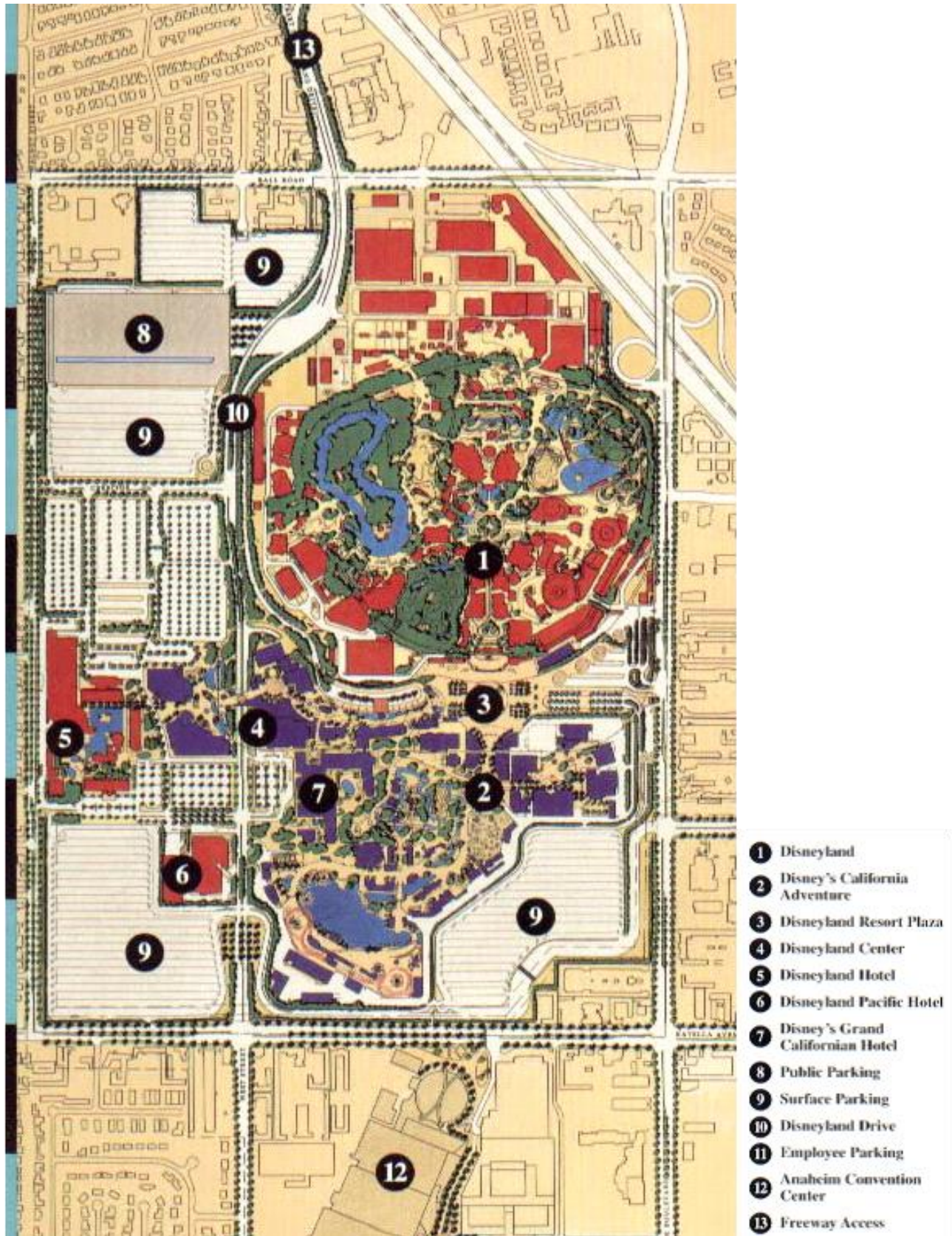


Fig. b. 9_map of project site

The objectives of the Disneyland Resort include (EIR #311, V.1, p 6-21):

- To reconfirm and enhance Southern California as one of the world's greatest tourist destinations.
- To transform the existing Disneyland Resort from a primarily day-use activity into a multi-day destination resort for use by the Southern California metropolitan area residents as well as visitors from around the world.
- To maintain and enhance the economic vitality of the City of Anaheim and Orange County by providing business and job opportunities associated with the construction and operation of the Disneyland Resort.
- To lay a foundation for future economic expansion.
- To minimize environmental impacts through comprehensive site development guidelines.

Theme Park	Visitors 1998
Disneyland Anaheim	13,680 millions
Knott's Berry Farm	3,400 millions
Six Flags Magic Mountain	3,070 millions
Universal Studios Hollywood	5,100 millions

Source: Amusement Business Magazine 1998, p.76

Fig. b. 10 Visitor numbers of the LA-area parks

Derivation of Visitors	Share
Local (Southern California)	47 %
North California	22 %
U.S. Domestic travelers	16 %
International (mainly: Japan, Canada, UK, Germany)	15 %

Source: Study of the Projected Future Tax Collections, p.5

Fig. b. 11 Derivation of Visitors

Impacts of the project

Employment

Construction of the WESTCOT Center (see glossary) will result in 51,200 direct and indirect person-years (equivalent to the hours worked by one employee 8 hours a day, five days a week) of construction jobs in Southern California.

Of this total, construction will require 23,800 person-years to build the WESTCOT Center. Indirect construction jobs within Anaheim will result in additional 1,500 person-years of employment. Additionally, approximately 25,900 indirect person-years of construction jobs will be located in the region, but outside of the City of Anaheim (EIR#311, V.1, p. 3-252). The provision of these employment opportunities is a beneficial impact to the economy.



Housing

Construction employees do not typically relocate for a project. Although the construction phase one and two will take place over 7 years, most of the required trades will only be working for specific segments of the construction period. In addition, unemployment in the construction field is currently high. There are many unemployed or underemployed construction workers in the region who do not have to relocate for project employment. Construction employees are not expected to have a significant impact on housing (EIR#311, V.1, p 3-252).

Jobs by Category	WESTCOT and Associated Uses Employment in 2002	Future Expansion District Employment in 2010	Total Project Employment by 2010
Theme Park (based on attendance)	6,630	3,315	9,945
The Disney Resort Hotels (based on rooms)	5,600	0	5,600
Retail (in Theme Parks, based on gross square feet)	2,100	0	2,100
Subtotal Future jobs	14,330	3,315	17,645
Existing site jobs (subtracted) ^{a)}	2,482	0	2,482
Net direct jobs	11,848	3,315	15,163
Full-time	5,198	1,034	6,232
Part-time	3,809	1,429	2,238
Casual/Temporary	2,841	852	3,693
FTE primary wage earners	4,258	1,010	5,268
^{a)} Existing jobs that will be replaced by the Disneyland Resort are subtracted from the estimates shown above for the Disneyland Resort			

Source: EIR#311, V.1, p3-273

Fig. b. 12 Employment projections



The development of the theme park, Hotel, and Parking Districts will result in 5,198 direct, new permanent full-time cast member jobs, 3,809 permanent part-time cast jobs, and 2,841 casual/temporary cast jobs in the year 2002. WESTCOT represents 4,258 jobs likely to be filled by full-time equivalents (FTE) primary wage earners who are workers most likely to influence the residential location decision of their respective households, as is discussed further below.

Assuming a third park in the Future Expansion District will be operational by 2010, it will add 1,034 more full-time, 1,429 more part-time, and 852 more casual/temporary jobs. Full-time equivalent earner jobs will number 5,268.

Since the proportion of the theme-park area to the Hotel-Retail area is changing (disproportionately more Hotels and Retail-shops areas are added) the employment structure also changes:

CHANGES IN CAST CHARACTERISTICS (deriving from expansion of the park)		
Characteristic	Current Cast	Project Cast
Work site		
Theme Park	85.0 %	77.3 %
Hotel	15.0 %	22.7 %
Job Status		
Full-time	37.8 %	41.1 %
Part-time	37.5 %	34.6 %
Casual/Temporary	24.8 %	24.4 %
Median Age	27 years	28 years
Median Time Employed	36 months	36 months
Median Household size	3 persons	3 persons
Wage Earner Status		
Primary	39.9 %	41.7 %
Secondary / Other	60.1 %	58.3 %
Housing Tenure		
Owners	68.4 %	67.2 %
Renters	30.3 %	31.6 %
Other	1.3 %	1.2 %
Median months at current address	48 months	48 months

Fig. b. 13 Changing in cast characteristics

Source: EIR#311, V.4, Appendix H, p.51

WORKFORCE DEMANDED BY THE PROJECT

DIRECT EMPLOYMENT 2002 AND 2010 FORECAST			
Employment	WESTCOT Jobs (as percent of 2002 forecast)	Total direct Jobs (as percent of 2010 forecast)	Total direct Jobs as percent of projected Job Growth (1990-2010)
Share in the City of Anaheim			
Net jobs	6.2 %	7.0 %	32.4 %
FTE Primary wage earner jobs	2.2 %	2.4 %	11.3 %
Share in the Northwest Orange County Subregion			
Net Jobs	1.4 %	1.6 %	8.2 %
FTE Primary wage earner jobs	0.5 %	0.6 %	2.8 %

Source: EIR #311, V.1, p.3-274

Fig. b. 14 Direct employment 2002 and 2010 forecast

WESTCOT's cast is equal to 8 % of the number of Anaheim resident labor force. At buildout in 2010, the project's cast will be equal to 9 percent of the City's resident labor force. Based on existing cast characteristics (taken from the existing Disneyland Resort), the project labor force will most likely be drawn from an area larger than the City of Anaheim (EIR #311, V.1, p.3-275).

POTENTIAL AND INDUCED EMPLOYMENT

The only reliable way to estimate indirect jobs and where such jobs are likely to occur is through the operation of an econometric model of the region. It traces the flow of dollars associated with construction and operation of the project as this spending filters through the various sectors of the regional economy.

The fiscal impact analysis indicates that each direct job associated with operation of the WESTCOT Center in Anaheim will result in 0.777 indirect jobs. About 15 percent (1,800) of these indirect jobs will be located in Anaheim (EIR #311, V.1, p.3-276). Applying these factors to the estimate of 15,163 total net direct project employees and 3,211 induced jobs suggests that the project could result in 14,277 indirect jobs, of which 2,142 would occur in Anaheim.

HOUSING

The project does not include any dwelling units, and therefore will not result in any direct increase in population in either Anaheim or the subregion of Orange County.

For the Disneyland Resort as a whole, it is estimated that 553 cast households will seek housing in Anaheim, or 1,659 people, which represents 5 percent of the 1990 – 2010 population growth forecasted by SCAG for Anaheim.

The construction of the Disneyland Resort does not include the construction of any new residential units. Casual and temporary theme park workers are largely students living at home, and therefore their decision to take a job at the project is unlikely to influence their household's decision about where to live.

IMPACTS ON THE HOTEL INDUSTRY

There are more than 80 motels and hotels within a two-mile radius of Disneyland, which contain approximately 16,000 rooms (Source: PKF Consulting, p. 19). Within Anaheim's The Economic Impacts Of Theme Parks On Regions Michael Braun 82 hotel inventory, the highest rated properties are the Disney branded, followed by the relatively new Convention Center headquarters hotels. Because of their very large size, the mentioned properties account for approximately one quarter of the City of Anaheim rooms inventory.

Projected Supply and Demand for Lodging						
Fiscal year	Supply			Demand		
	Addition	Room Nights	Percent Change	Room Nights	Percent Change	Occupancy
1998	0	6,214,125	-	4,289,079	-	69.0
1999	-146	6,160,835	-0.9	4,323,155	0.8	70.2
2000	0	6,160,835	0	4,146,641	-4.1	67.3
2001	750	6,434,585	4.4	4,143,243	-0.1	64.4
2002	2000	7,164,585	11.3	5,102,810	23.2	71.2
2003	1000	7,529,585	5.1	5,406,278	5.9	71.8
2004	1000	7,894,585	4.8	5,657,982	4.7	71.7
2005	750	8,168,335	3.5	5,844,132	3.3	71.5
2006	500	8,350,825	2.2	5,968,232	2.1	71.5
2007	250	8,442,085	1.1	6,030,282	1.0	71.4
Compound annual growth rate			3.5	4.1		

Source: PKF Consulting, p20.

Fig. b. 15 Projected supply and demand for lodging

Projected growth in average daily room rate

Fiscal Year	Average Daily Room Rate	Growth	Revenue (USD)	Growth
1998	72.97	6.0	312,191,003	4.3
1999	75.09	3.2	324,615,174	4.0
2000	78.22	4.2	324,355,429	-0.1
2001	82.02	4.9	339,813,126	4.8
2002	88.08	7.4	449,470,935	32.3
2003	90.65	2.9	490,101,563	9.0
2004	93.23	2.8	527,488,386	7.6
2005	95.97	2.9	560,867,656	6.3
2006	98.86	3.0	590,036,946	5.2
2007	101.91	3.1	614,541,792	4.2
Compound annual growth		4.2 %	6.4 %	

Source: PKF Consulting, p22.

Fig. b. 16 Projected growth in average daily room rate

Public Costs and Benefits

INFRASTRUCTURE COSTS

The expanded Disneyland is expected to draw 20 million and more visitors annually when finished. Currently, Disneyland attracts estimated 14 million visitors per year – this growth in visitor numbers makes clear, that a huge infrastructure investment programme has to take place.

Areawide improvements for WESTCOT costs are paid through issuance of revenue bonds, Federal, State, and Regional funding, and by bed tax collections and interest earnings. Disney and bond insurers have agreed to cover any bond payment shortfalls, meaning that there is no risk to Anaheim's taxpayers and the City's general fund. No new taxes have to be introduced on Anaheim's taxpayers to construct this project

COMMUNITY DEVELOPMENT	Amount (in million USD)
West Lincoln Ave. Widening / Beautification	\$ 3.0
Miscellaneous Community Development Improvements	\$ 1.2
POLICE AND FIRE BRIGADE	
Anaheim Canyon Substation	\$ 6.9
Fire Station Katella Street Relocation	\$ 1.4
Fire Station Clinton Street Modification	\$ 1.4
PUBLIC WORKS	
Anaheim Resort Area	\$ 450.0
Citywide Street Construction	\$ 26.0
Citywide Street Reconstruction	\$ 21.5
Sewer and Storm Drain improvements	\$ 8.3
Rail Improvements	\$ 1.5
Traffic Systems and Signals	\$ 5.5
Katella Ave Improvement	\$ 41.3
Imperial Highway Project	\$ 10.0
PUBLIC UTILITIES - ELECTRIC	
System Undergrounding	\$ 43.7
Overhead Line Extensions	\$ 15.0
Residential Expansion	\$ 11.0
Energy Efficiency program	\$ 6.9
Substation Improvements	\$ 5.7
Transformers and Capacitors	\$ 4.0
Control System Improvements	\$ 2.4
Telecommunications	\$ 2.1
System Protection Improvements	\$ 2.0
Communication System Improvements	\$ 2.0
Remote Customer Services Location	\$ 0.1
PUBLIC UTILITIES - WATER	
Water Main Replacements	\$ 16.8
New Water Transmission Mains	\$ 12.0
Water Production System	\$ 10.3
OTHER PUBLIC AGENCIES	
Interstate Highway 5 Improvement	\$ 1,100
TOTAL PUBLIC PROJECTS	\$ 1,812
PRIVATE DEVELOPMENT	
Disneyland Resort Expansion	\$ 1,400
New Commercial, Retail	\$ 690
TOTAL PRIVATE PROJECTS	\$ 2,090

Source: Addendum to "The Disneyland Resort Final EIR No.#311", p. 85

Fig. b. 17 Absorption of costs

Environmental costs of the project

The following significant cumulative impacts are identified (EIR #311, V.1, p 5-30):

- Loss of prime agricultural land
- Land use incompatibilities inherent in the juxtaposition of commercial and residential uses.
- Cumulative air quality impacts related to emissions of ROG, NO_x, CO and PM₁₀ which will exceed SCAQMD significance thresholds, significant cumulative Sox emissions may also occur but are required to be offset.
- Construction impacts such as transportation disruption, air emissions, and visual disruptions.
- Solid waste impacts due to limited landfill capacity
- Potential impacts related to cumulative consumption of electricity and natural gas.

TRAFFIC

Types of traffic	P.M. Peak hour vehicle trip generation		
	Year 1990	Year 2002	Year 2010
Theme park related	48,377	52,639	59,054
Trough-Traffic	46,386	52,503	58,618
Total	94,763	105,142	117,672
Total growth rate	= 0	10.95 %	24.17 %

Source: EIR #311, V.5, p1-23

Fig. b. 18 PM peak hour vehicle generation

WATER

PROJECTED WASTEWATER FLOW		
Component	Existing Wastewater Generation (thousands gallons per day)	Proposed Wastewater Generation (thousands gallons per day)
Existing		
Disneyland Theme Park	1190	
Disneyland Hotel	490	
TOTAL	1680	
Proposed Uses (WESTCOT Center)		
WESTCOT Theme Park		1900
Hotels		1160
Disneyland Park Additions		320
New Facilities Subtotal		3380
Existing uses to be credited		490
Future Expansion District		320
Subtotal		3210
TOTAL NET PROJECT GENERATION		3210 + 1680 = 4890

Source: EIR #311, V.5, Section 4, p.55

Fig. b. 19 Projected waterflow waste



In order to minimize water consumption, it is required by the City that water conserving practices are adopted, such as (Source: EIR #311, V.5, Section 4,p.62):

- Use of reclaimed water for irrigation and washdown when it becomes available
- Use of vacuums and other equipment to reduce the use of water for washdown of exterior areas.
- Installation of flow-fittings and equipment such as low-flush-toilets and urinals
- Include self-closing valves for faucets and drinking fountains.
- Use of efficient irrigation systems such as drip irrigation and automatic systems, which use moisture sensors.
- Public information / awareness on water conservation via bathroom stickers, table tents, etc.
- Maximize the use of water efficient technologies and practices in any new Disney facility.

ELECTRICITY

PROJECTED ELECTRICAL CONSUMPTION		
Component	Existing annual Consumption (kWh)	Proposed Annual Consumption (kWh)
Existing use to remain		
Disneyland Theme Park	90,975,000	
Disneyland Hotel	46,380,000	
Subtotal	137,355,000	
Proposed uses (WESTCOT Center)		
WESTCOT Theme Park		206,885,000
Hotels		49,790,000
Public Parking facilities		34,059,000
Disneyland Theme Park Additions		18,865,000
Subtotal		309,599,000
Existing uses to be credited		19,412,000
Subtotal		290,187,000
Future Expansion District		88,000,000
Total net Project Consumption		378,187,000

Source: EIR#311, V.1, p.3-345

Fig. b. 20 Projected electrical consumption

As mitigation measures, the City of Anaheim requires the Disney Corporation to incorporate energy efficient technologies and practices to reduce on-site consumption of electricity, such as (Source: EIR #311, V.5, Section 4, p.76):

- Time-controlled interior and exterior public area lightning. Aesthetics lightning should be considered.
- The use of day lightning and photo cell controls for parking structures and other common area lightning
- The use of reflectors in ceiling lights
- Thermal insulation of walls to exceed state and local standards.
- The use of high-efficiency motors and motor controls (i.e. variable speed controls)
- The uses of variable volume pumping on water supply systems within the park and hotel areas.

AIR QUALITY

Mitigation measures (Protocol of the “Special Meeting of the Anaheim City Planning Commission”, p25):

- The Disney Corporation is required to use clean fuel (not fossil) for attraction rides and other uses, as far as practicable.
- To the extent practicable, goods movements shall be scheduled for off-peak traffic hours by the carrier to avoid additional traffic congestion).
- Parking structures have to feature electronic and signage utilities to enhance smooth traffic flows and to reduce additional pollution
- Due to the fact, that the projects main customers will be families, extra ramps to the parking lots for car-pool lane – users will be constructed to avoid traffic congestion and additional air pollution consequently.
- The use of electrical people movers and electrical shuttle buses from the parking lots to hotels and theme parks has to be implemented by the carrier of the project.

PROJECTED CUMULATIVE OPERATIONAL EMISSIONS
IN THE YEAR 2002(in tons per day)

	ROG	CO	SOx	NOx
WESTCOT Center	0.1492	0.9081	0.0444	0.5248
Cumulative Projects	0.8214	6.3875	-	1.3049
TOTAL	0.9706	7.2956	0.0444	1.8297
<ul style="list-style-type: none"> • WESTCOT Center includes: Utility emissions, onsite engines and vehicles, offsite motor vehicle trips • Cumulative Projects includes: Mobile source emissions associated with related projects 				

Source: EIR#311, V.1, p.4-15

Fig. b. 21 Projected cumulative operational emissions in 2002

SOLID WASTE

WESTCOT Center alone is estimated to generate an additional 23,686 tons of solid waste per year or 65 tons per day. The city of Anaheim requires the Disney Corp. to reduce their solid waste by 25 %, which means a reduction from 45,463 tons to 36,370 tons. This shall be achieved by (EIR #311, V.5, Section 6, p.87)

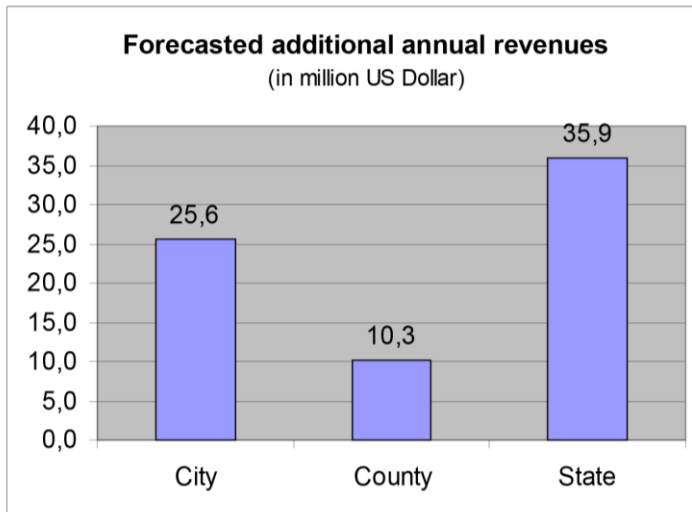
PROJECTED SOLID WASTE GENERATION		
Component	Existing Solid Waste Generation (in metric tons a year)	Estimated Solid Waste Generation (in metric tons a year)
Existing		
Disneyland Theme Park	10,950	
Disneyland Hotel	4,745	
Total	15,695	
Proposed Uses (WESTCOT Center)		
WESTCOT Theme Park		15,661
Hotels		3,460
Disneyland Park Additions		4,565
New Facilities Subtotal		23,686
Existing uses to be credited		1,172
Future Expansion District		7,290
Subtotal		29,840
TOTAL NET PROJECT GENERATION		15,659 + 29,840 = 45,463

Fig. b. 22 Projected solid waste generation

Methods:

- Using recycled paper products for stationery, letterhead, and use of recycled paper for packaging
- Recovery of materials such as aluminum and cardboard.
- Collection of office paper including most offices and work sites in the park
- Receptacles for recycling of polystyrene (foam) cups. The cups are compressed into discs and a vendor hauls them to a local recycler for reprocessing them.
- Use of recycled toilet tissue and recycled paper towels.

MONETARY IMPACT

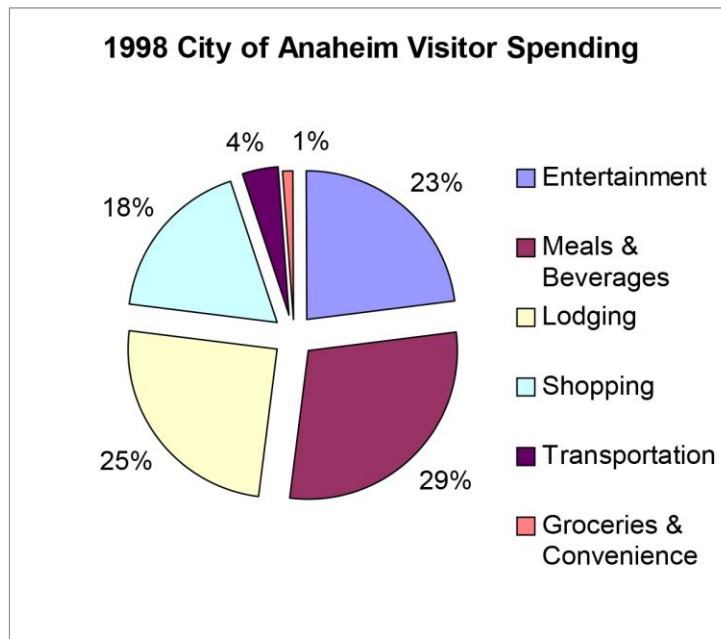


Source: The Disney Corp. 1996a (Inflation until 1999 considered)

Fig. b. 23 Forecasted additional annual revenues

The Disneyland Corp. has a study being done, which estimates that the Disneyland Resort expansion will generate approximately USD 25 million per year in new revenues to the city of Anaheim and almost 36 million US Dollar to the state.

Visitor spending in the city of Anaheim



Source: Anaheim/ Orange County Visitor Bureau 1998, p.6

Fig. b. 24 Visitors spending in the city of Anaheim

Industry Sector	Employment	
	Number	% of Total
Eating & Drinking Establishments	39,800	26.5 %
Hotels & other Lodging Places	23,800	15.8 %
Retail Trade	23,600	15.7 %
Personal, Business & other Services	21,800	14.5 %
Amusement & Recreation Services	20,100	13.4 %
Financial, Insurance & Real Estate	6,100	4.1 %
Manufacturing	3,500	2.3 %
Transportation	3,200	2.1 %
Wholesale Trade	3,100	2.1 %
Government	1,800	1.2 %
Communications & Utilities	1,600	0.9 %
Construction	1,200	0.8 %
Agriculture, Other Resources and Mining	600	0.4 %
Total	150,200	100 %

Source: Anaheim / Orange County Visitor Bureau 1998, p.6

Fig. b. 25 Orange County employment impact of visitors spending

Presenting the results of the study (Anaheim / Orange County Visitor Bureau 1998, p.6) it has to be stated that:

- Each 1 % increase in visitors creates 1,500 jobs,
- 26 jobs are created per million dollars of spending,
- nearly 49 % of visitor industry employees are minorities,
- Visitor industry employees are 52 % male and 48 % female.



Total LMPR Payments

Financial year	Non-Disney Hotel Room Revenue	15 % TOT	3 % of Room Revenue (used for LMPR payment)	TOTAL LMPR Payment Flow (From City of Anaheim to Financial Authority)
2001	270.450.055	40.567.508	8.113.502	8.113.502
2002	326.140.101	48.921.015	9.784.203	35.461.918
2003	363.070.804	54.460.621	10.892.124	37.340.171
2004	396.646.704	59.497.006	11.899.401	39.140.889
2005	426.100.724	63.915.109	12.783.022	40.841.754
2006	451.227.006	67.684.051	13.536.810	42.437.305
2007	471.567.554	70.735.133	14.147.027	43.914.536
2008	485.714.581	72.857.187	14.571.437	45.231.972

Financial year	Room Revenue from Disney's additional Hotels	15 % TOT	Estimated Food&Beverage and Merchandise Revenue	Sales Tax at 1 %	TOTAL TAX REVENUE to the City of Anaheim from Disney Sources (used for LMPR Payment)
2001	-	-	-	-	-
2002	123.330.834	18.499.625	717.809.000	7.178.090	25.677.715
2003	127.030.759	19.054.614	739.343.270	7.393.433	26.448.047
2004	130.841.682	19.626.252	761.523.568	7.615.236	27.241.488
2005	134.766.932	20.215.040	784.369.275	7.843.693	28.058.733
2006	138.809.940	20.821.491	807.900.353	8.079.004	28.900.495
2007	142.974.238	21.446.136	832.137.364	8.321.374	29.767.509
2008	147.263.466	22.089.520	857.101.485	8.571.015	30.660.535

SOURCE: PKF Consulting, p.26, p.30

Data in US Dollar

Fig. b. 26 total LMPR payments

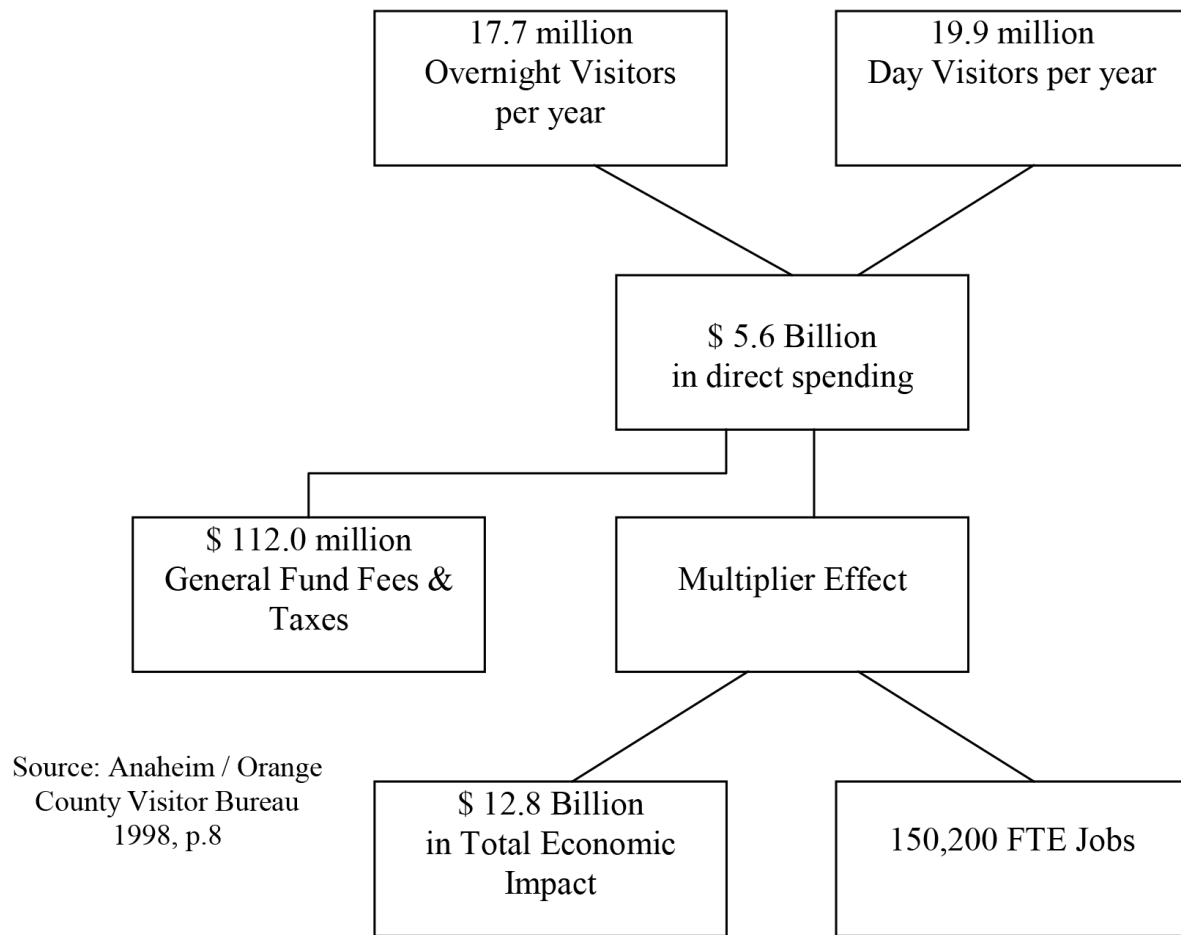


Fig. b. 27 Analysis of total economic impact

The direct and indirect economic impact can be summarized (Anaheim / Orange County Visitor Bureau 1998, p.6):

- \$ 5.6 billion in direct visitor spending
- nearly \$ 12.8 billion in direct and indirect spending within the county including:
 - \$ 3.2 billion in total personal income generated by visitor spending
 - Each 1 % increase in visitor spending adds \$ 128 million to Orange County's economy and creates \$ 32 million in earned income for residents.

Local governments receive \$ 112 million in general fund fees and taxes from visitors and visitor-related industries. The State of California receives \$ 157 million in tax revenues from Orange County visitor spending.

CASE STUDY: ISTANBUL THEME PARK

The city: Istanbul

Istanbul is situated in and between two continents, Asia and Europe and it has always been an important economic, social and cultural centre throughout its history. Istanbul, which stretches to 5,512 km² area with its population around 14 million, is the 21st largest city in the world and the biggest metropolis of Turkey. Almost 15% of the country population which lives in Istanbul constitutes 32% of the total work force in Turkey. Istanbul conducts 55% of the total trade and holds 38% of the industrial facilities across Turkey. Besides, 25% of the total tourism revenues are directly provided by Istanbul and 43% of the overall foreign trade of Turkey is conducted within the city. Istanbul makes the largest contribution to the Turkish GDP at around 20-25 % level.

Istanbul, with its 1,596 persons/km² population density which is about the same level as Tokyo (1,546 persons/km²) and below London (1,846 persons/km²) and above Paris (791 persons/km²) and New York (922 persons/km²), is considered as one of the biggest metropolis in the world.

Istanbul has as many layers of history beneath the foundations of its buildings as any city in Europe. Istanbul has been the capital city of three, or perhaps four, empires. It is still shaped by the surviving fragments of Greek, Roman, Byzantine, Venetian and Ottoman civilizations. It has Orthodox Christian churches, Sunni mosques, and Sephardic synagogues. It has vast classical cisterns, ring upon ring of ancient fortifications, souks and palaces. It also has desolate concrete suburbs of extraordinary bleakness, urban terrorism, and a rootless, dispossessed underclass struggling to come to terms with city life.

Urban form

CLIMATE CONDITIONS

The climate in Istanbul is generally similar to the Marmara region; summer months are warm and humid with very little rain especially between July-August, winter months can be cold and wet with some snow but not as extreme as some other areas of Turkey. Spring and autumn are mild. During the summer months, the air temperature can go up to 30 degrees Celsius (86 degrees Fahrenheit). During winter months, the temperature is around 10 degrees (50 Fahrenheit). In the springtime, especially between April-May and September-October, there is a very comfortable climate with around 15-25 degrees (59-77 Fahrenheit).

TRANSPORTATION

Motorway Transportation

Motorway access to the area is provided by D100 and TEM motorways and Basın Ekspres Road linking these two. TEM motorway lies in the North of the land, D100 motorway in the South and Basın Ekspres in the East. Besides the main roads there are three main junctions that ease the accessibility of the area:

- Sefaköy Junction makes access to Halkalı Street,
- Cennet Junction to İstanbul Street in the west of Sefaköy, and to İstasyon Street in the north.
- Airport Junction provides three access, respectively to Halkalı, Sefaköy and Halkalı Mass Housing Area



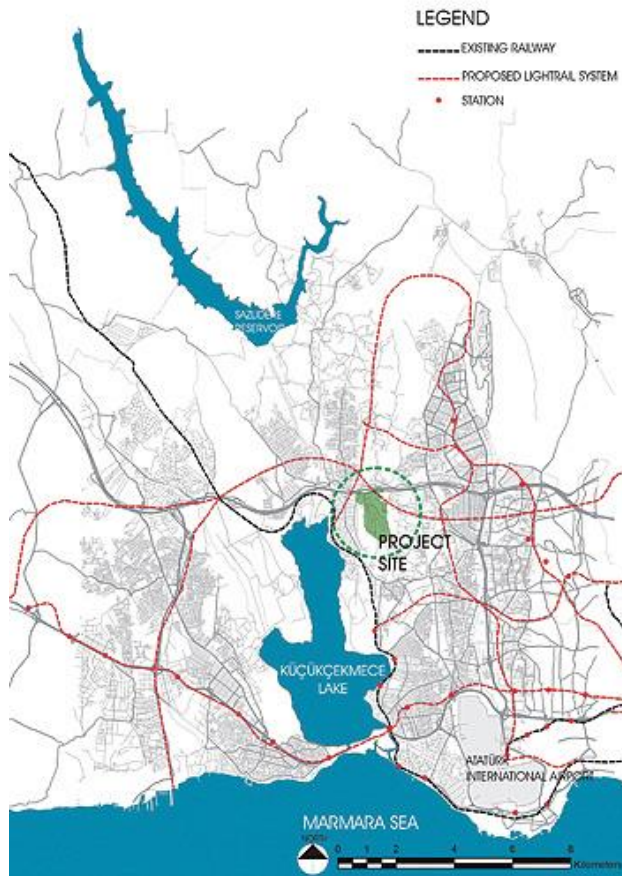


Fig. c 1 Istanbul motorway transportation network

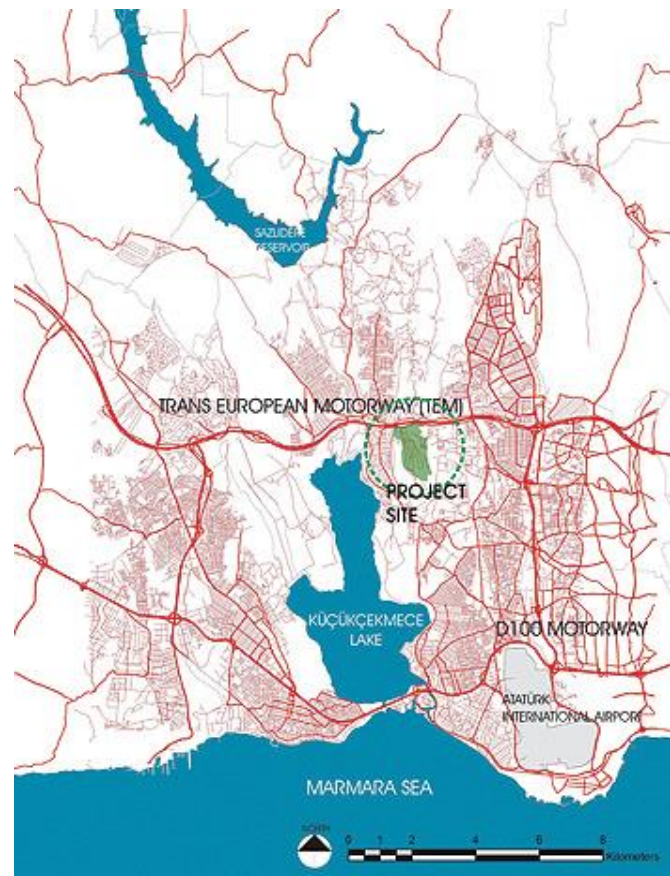


Fig. c 2 Istanbul railway network

Atatürk International Airport:

Atatürk International Airport is the major international airport in Istanbul, Turkey with a total passenger traffic of 32 million for the year 2010. Handling over 825,000 tones of load (cargo, freight and mail) it is among the top 40 airports in the world in terms of total passenger traffic and the 19th busiest in the world in terms of international passenger traffic. It was Europe's 8th busiest airport in 2010.

Railway Transportation:

The main railway line of Istanbul in the west side passes through the area. Starting from the Sirkeci Station in Historical Peninsula, the railway line reaches to the East of Küçükçekmece Lake, and then continues until Bulgaria. Between Sirkeci and Halkalı, it also serves as a suburban train.

There are certain upgrades in the railway network of the district and some new lines have been introduced by the Transportation Authority of Istanbul. Those are;

- Bakırköy-Sefaköy-Avcılar Light Rail Line
- Sefaköy-İkitelli-İSTOÇ Monorail Line
- Kirazlı-Halkalı Light Rail Line

LANDUSE

The area represents a variety in land uses including housing, industry, retail, agriculture, etc.

Residential Areas: Due to the high population increase, the settlements in the district have been subject to substantial changes. They spread to vast sizes of lands, however, with a variety of quality and standard. Particularly, the spans along the Küçükçekmece Lake and D100 Motorway are in low standard and vulnerable to possible earthquake damages. These unauthorized and high dense building fabrics are subject to urban transformation ahead.

Mass housing is the dominant feature of the area. While mass housing examples in Halkalı and İkitelli provide rather qualified space configurations, settlements along the north section of D100 Motorway are in poor conditions. Besides, Tepeüstü and Altınşehir which are lining up along the TEM; as well as Yarımburgaz in south section of TEM, do not represent a homogenous feature, but are mostly formed by dense and unauthorized building fabrics. From the most to the least, those settlements can be put in a sequence regarding their densities and sizes as; Sefaköy, Halkalı, Küçükçekmece, Avclar, İkitelli, Tahtakale, Firuzköy, Altınşehir, Şahintepe and Güvercintepe.

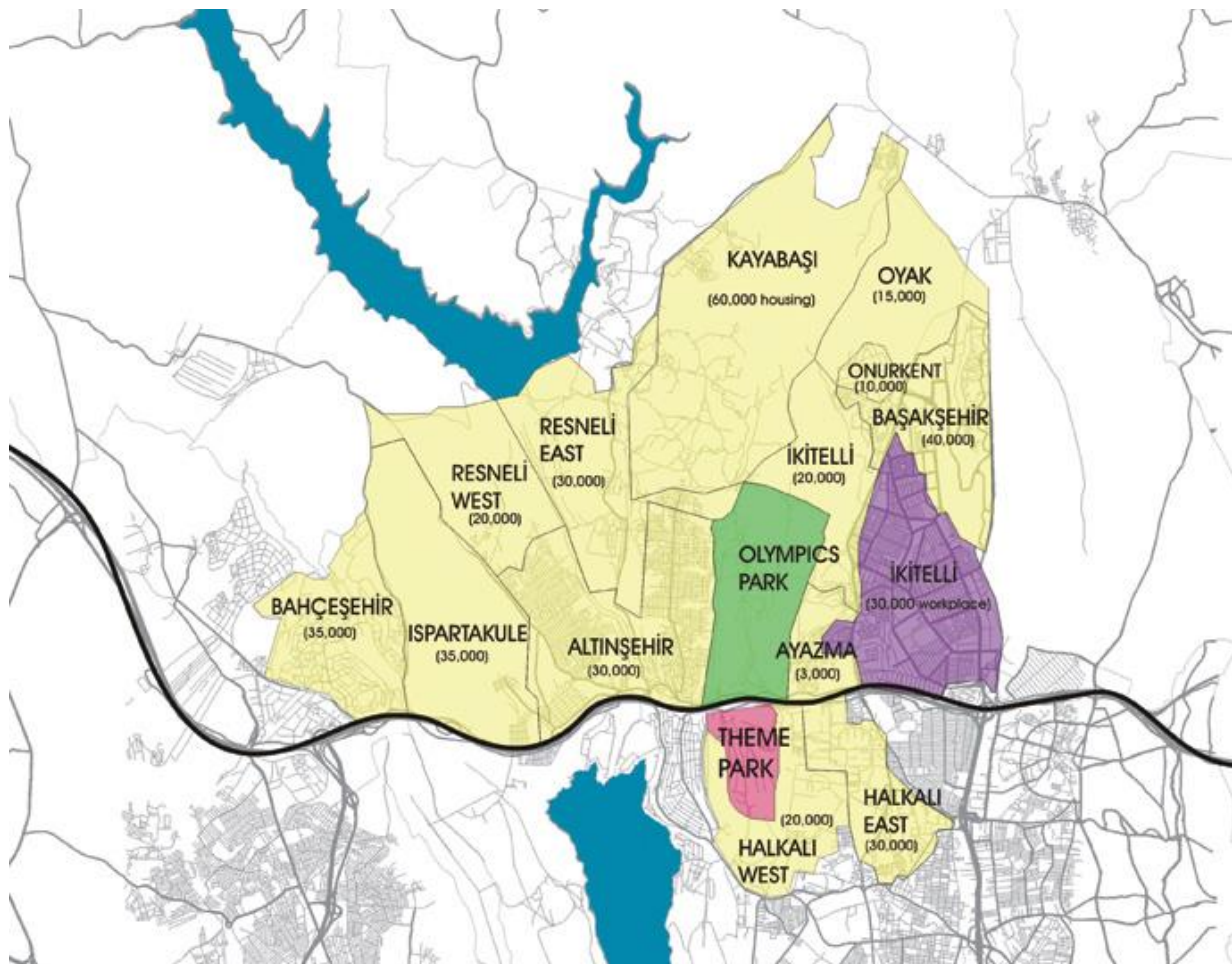


Fig. c 2 Mass Housing Areas in Küçükçekmece Lake and Its Environs

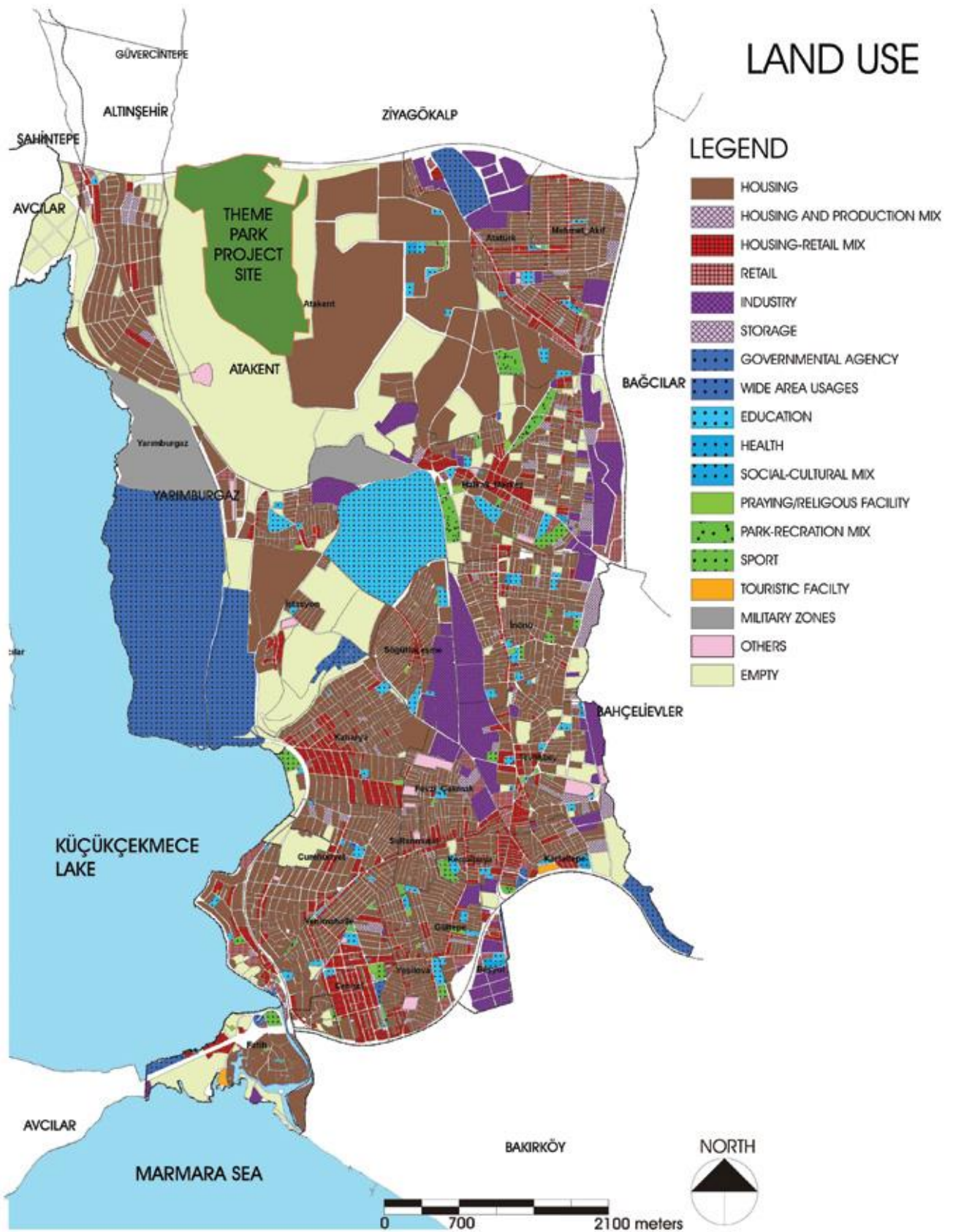


Fig. c 3 Istanbul land use

Industrial Areas:

The area includes a great deal of industrial functions. The existence of more than 200 plants in large scale and 10.000 small and medium units indicates that the area is the industrial center of Istanbul. Sefaköy, Firuzköy, and İkitelli industrial zones which are located in the area are highly active in the economical functions. Manufacturing and textile are the primer branches of the production activities in the area. İkitelli Industrial Zone is the largest one that spreads to 765 hectare and includes 33 corporate unions within 30,000 units. From chemical and plastic production to textile and metal goods, various modes of industrial activities are largely carried out in İkitelli.

A great deal of industrial activities also takes place along the route which connects Firuzköy with D100 Motorway. Following the decentralization efforts for the industrial activities in the city center, this part of the city suddenly became subject to rapid population increase. It provides a very wide range of manufacturing activities; from textile and plastic to wooden and upholstery. In the areas where Firuzköy and Avcılar are close, textile and garment production are seen dominant.

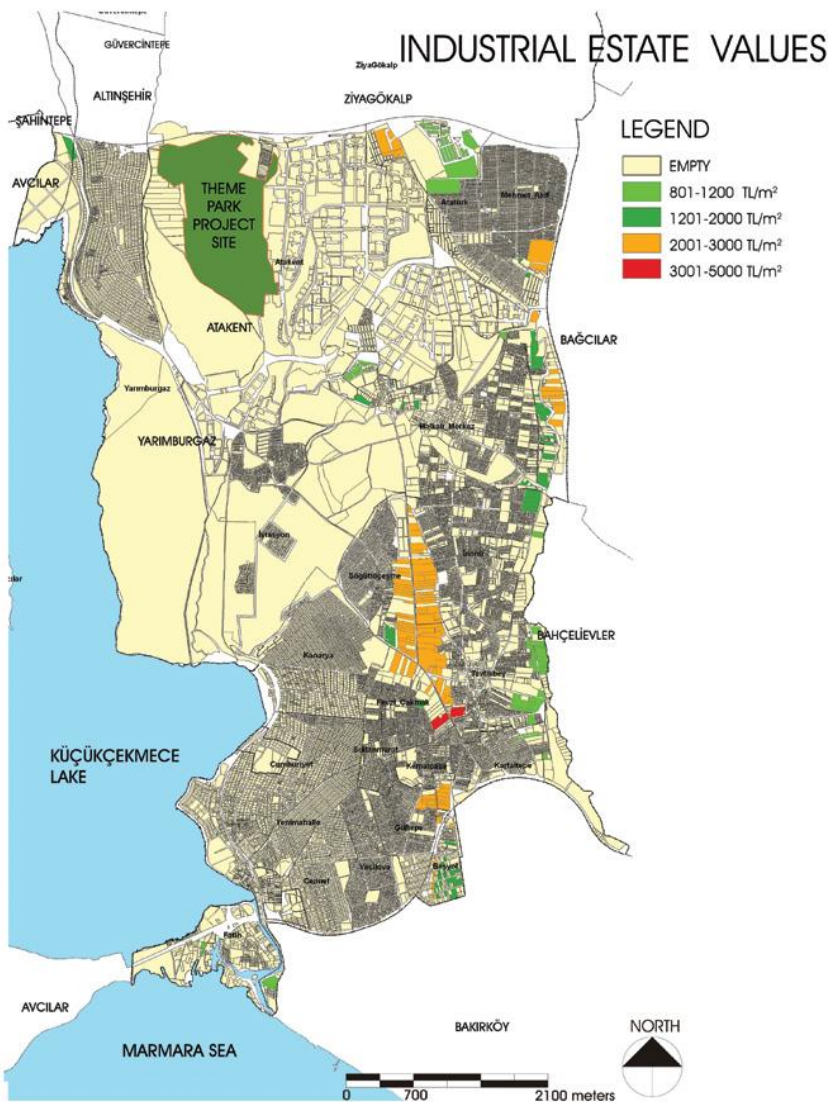


Fig. c 4 Istanbul industrial estate values

Commercial and Service Areas:

Küçükçekmece already represents the characteristics of 2nd degree sub-center. While Bakırköy, which is one of the neighboring districts in the east of Küçükçekmece, is considered to be 1st degree due to its proximity to the city center and high accessibility from the metropolitan area with strong transportation means, Küçükçekmece takes a second rank. Apart from being relatively far from the city center, the volume of retail activities, varieties in services and socio-cultural facilities needs to be upgraded to achieve a first rank. However, increasing transportation investments, regarding the massive urban development pressures in coming years, Küçükçekmece District is likely to play a central role in the reorganization of Central Business Functions in Istanbul. As part of the metropolitan area planning objective that to achieve a polycentric metropolitan model, it is aimed to bring the district to first rank sub-center. Therefore, transformation of industrial plants into business functions is a critical process that might change in long-run. Today's industrial identity may be converted into retail, service, and cultural.

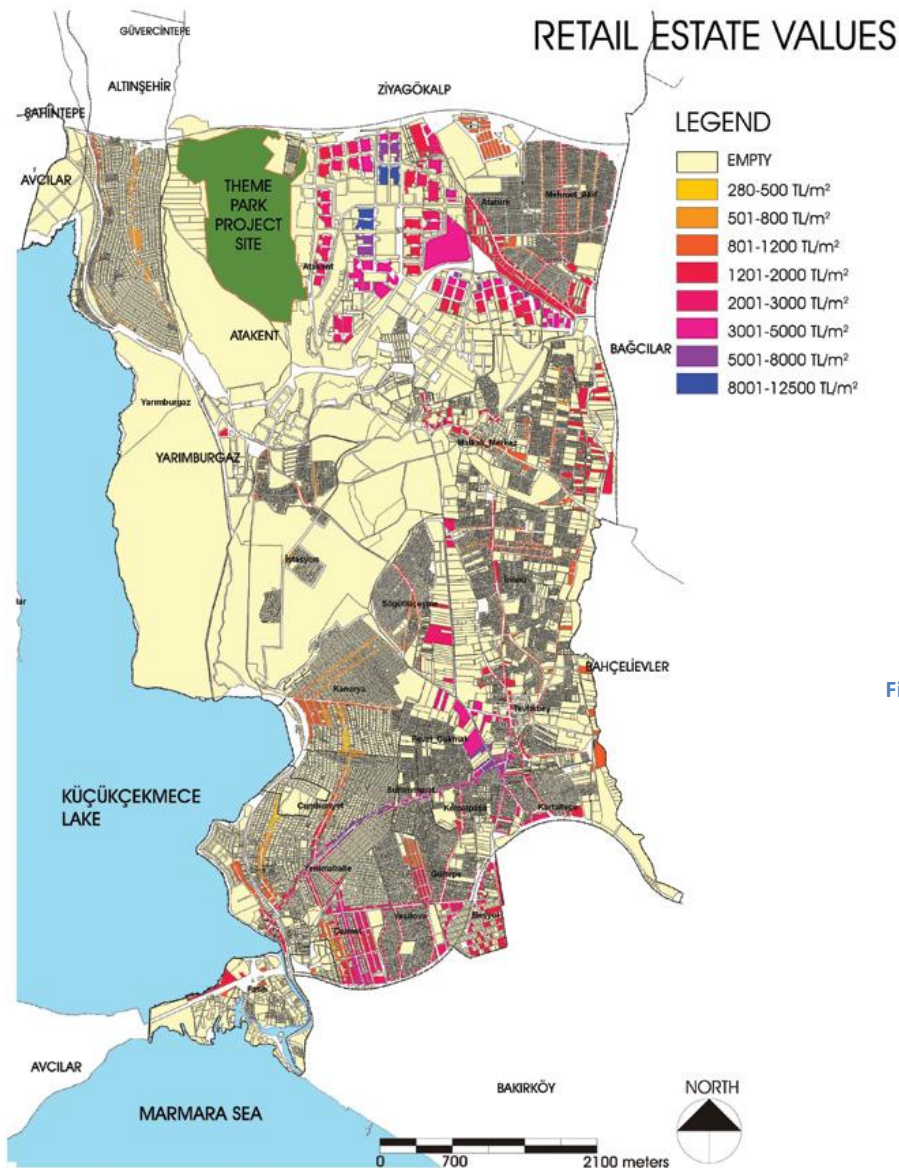


Fig. c 5 Istanbul retail estate value

Agriculture:

The changing feature of the fringes of Istanbul, from rural to urban, drastically diminishes agricultural activities. While it was one of the main rural destinations in the history of the city, the area is now the epicenter of a very large scale of urban development in Istanbul. Farms, lands, gardens, forests were used to be the main land use, but still a small amount of agricultural production takes place in the area. In Küçükçekmece, agriculture is still prevalent in Firuzköy, Kayabaşı, İkitelli, Altınşehir and Halkalı neighborhoods and Şamlar Village. Like agriculture, animal husbandry used to be active in the district before the high pressure of urban development. Cattle, lamb, sheep, cove were the main focus. However, still in the Halkalı, Altınşehir, Kayabaşı neighborhoods in Küçükçekmece and Firuzköy in Avcılar, animal husbandry continues to be a source of livelihood.

Military Areas and Nuclear Research and Education Center:

Military areas close to the Küçükçekmece Lake are in Fatih and Yarımburgaz neighborhoods in the north of the Nuclear Research Center. Since 1962, the Nuclear Research Center has been operating on a 280 hectare land and constitutes one of the major land uses in the area.

Education and Cultural Services:

There are many educational institutions in the area. Among these İstanbul University Avcılar Campus is very important. In the campus there are Engineering, Veterinary Medicine, Administrative Sciences departments and Technical Sciences High School. In the district a public training center, a cultural center and a private cinema area are active. Cultural activities seem less than needed, and a substantial demand due to the new urban developments is likely to arise ahead.

Health Services:

Private clinics, private hospitals and polyclinics seem less, and capacities are being mostly provided by new investments from private actors. Like cultural activities, demand for more health services is likely to arise ahead.

Active Green Areas:

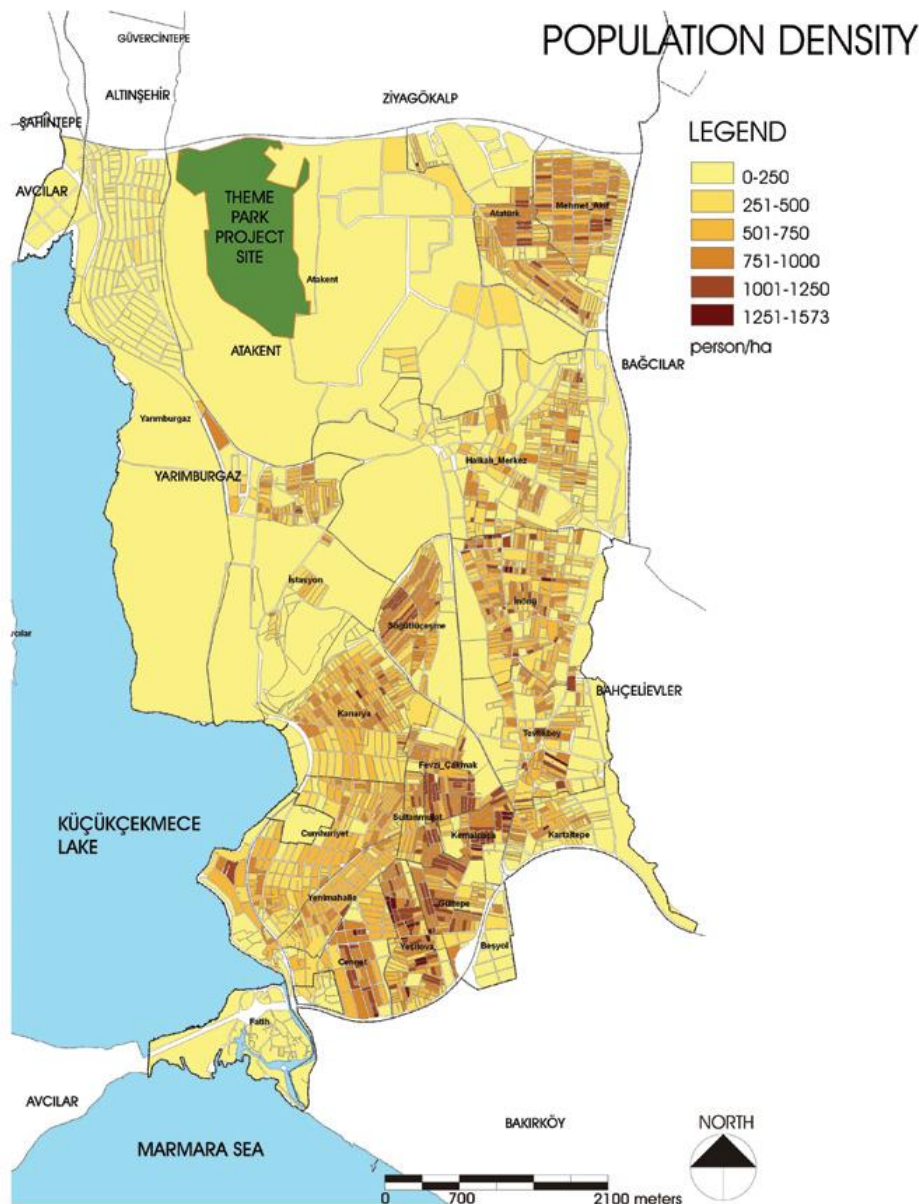
There are certain facilities provided for the dweller in the area in terms of parks, playgrounds and gyms; which are quite few. When the Olympic park situated in the area is complete, the district will serve as a nationally significant prestige area.

Infrastructural Facilities:

Sazlıdere Reservoir and Küçükçekmece Water Purification Plant are the major infrastructural facilities in the area.

Population

The area is one of the main destinations of population attraction in Istanbul. Since 1960s, with the speed of industrialization in Istanbul, the district has accommodated large scale industrial plants and manufacturing zones which have pulled influxes of workforce. Its proximity to the city center and having rather cheap land values has made the district highly attractive for low income new comers. As a result of the high increase in population of the district, mass housing formed the main feature of initial urban development configuration. The major population increase has risen especially since the beginning of 2000s. While the population was around 800,000 in 2000, recently this soared almost 2,000,000 habitants including the north and south sections of TEM. The main factor which constitutes this great rise is the new housing developments currently take place. However, it is likely that the rise will continue, and a population estimated at 1,000,000 is planned to be accommodated.



Istanbul Theme Park

The site

The site is located in the European side of Istanbul close to the Atatürk International Airport. The Trans European Motorway (TEM) runs by the site and makes it easily accessible to a significant residential market and as well highly visible to the millions of people who use TEM everyday. There are easy accesses from the motorway and more is planned for the future. Across the site on the north, the Olympic Park where the newly constructed Olympic Stadium is located. High rise housing developments are already present on the east while others are under construction on the west and north.

Metropolitan Area Master Plans in large scale and District Development Plans in detail delineate the site as a "Special Project Area" that would be able to serve both its nearby and metropolitan areas. Those plans set out a wide range of functions to be included in from theme park and fair and exhibition centers to residential and commercial activities.



Fig. c 7/1 Istanbul Theme Park site



Fig c 7/2 Subway line proposal

In the proximity of the project area; in the north 03 Güneyyarıyolu, the service road for TEM highway, in the northeast İBB Logistics Center and Administrative facility area, in the east 4. Street, İBB Halkalı Football Stadium, İMKB Anadolu Vocational High School, Menekşe Steam, in the West Bosphorus City Residential Area, Hospital, Altınşehir Cemetery, Military apartments and Youth Center Residences are located.

Proposals may be made for subway lines and stations that are under construction around the site.

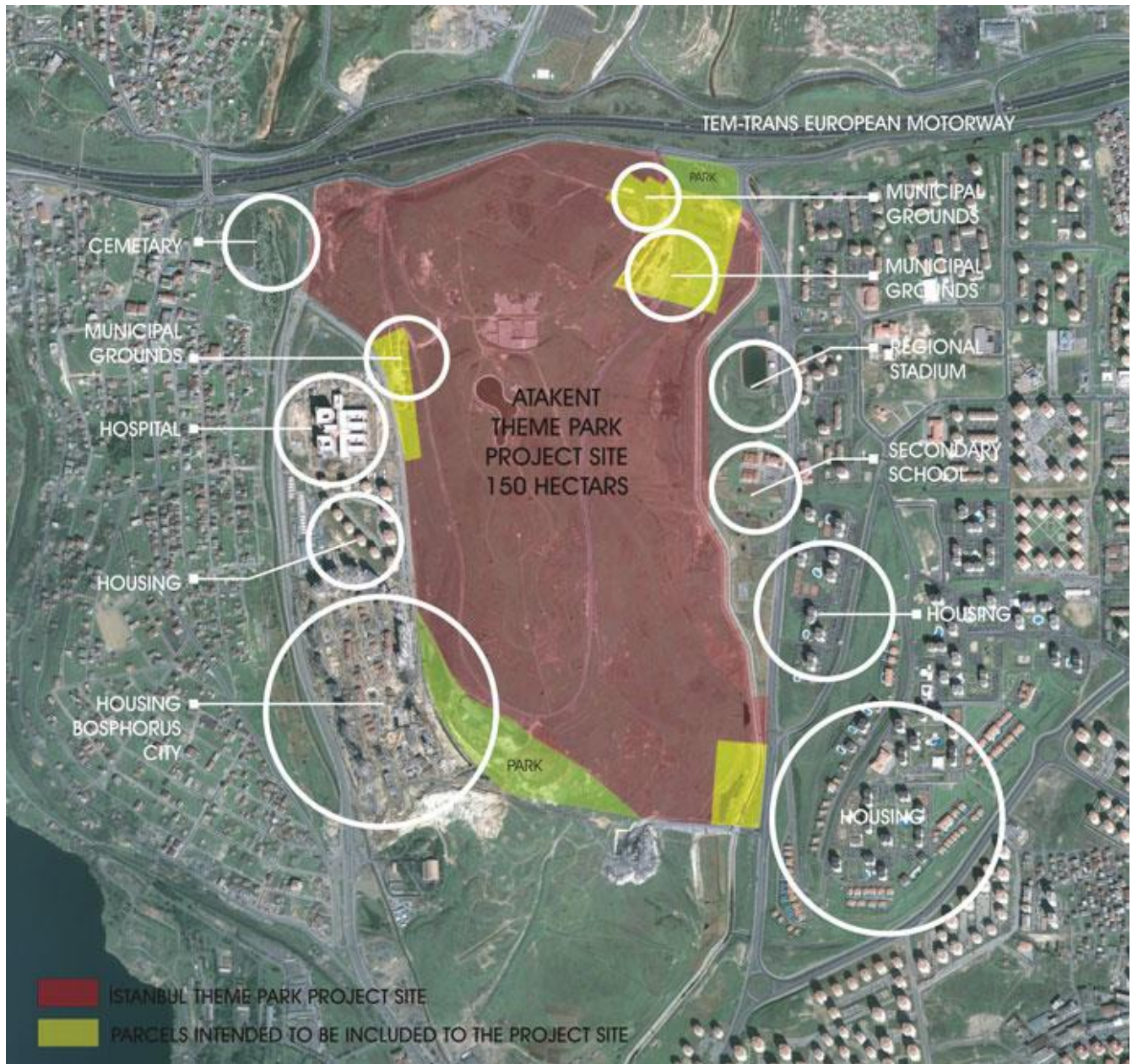


Fig. c 8 Surrounding area facilities

Transportation and accessing opportunities

The Site has rich access opportunities and seems to be gaining an urban destination character regarding the new transportation projects being developed by public authorities. The site has a direct access from O-3 Güney Yarıyolu which serves the Trans European Motorway (TEM), besides D100 Motorway in the South provides a variety of automobile connections from the metropolitan area.

The automobile is the most common vehicle used by the commuters in the area so far, but, public transportation is also rapidly increasing, however still lag behind the level it is supposed to be. It takes up around 20-30 minutes to get to the Site from the historical peninsula; but, during rush hours this duration may reach up to 1.5 hour. The critical issue here is the day by day increasing amount of new housing development around the Site which will increase the congestion level, unless an assertive public transportation system is introduced to the whole area.



Fig. c 9 subway projects within the vicinity

Recent ongoing light rail and underground projects are expected to diminish this inconvenience. When the planned network is completed, the Site will presumably be subject to a node in the metropolitan level. The Marmaray Project and direct linkage to European transit rail network is considered as the pivot project of Istanbul, and is expected to change the whole transportation pattern within the metropolitan area. International departures are also carried out over this line, and when the Marmaray Project completed Istanbul will directly be connected to major European cities, even to London.

Site potentials

The purpose of the site analysis is to identify certain limitations, restrictions and opportunities that may have implications on the planning and design phases. The analyses of the site has been based on various information sources including the topographical map with contours at 1.0 meter intervals; series of panoramic pictures taken from different viewpoints showing the surrounding areas and the physical features of the site and geological surveys.

Opportunities of the Site:

- **Accessibility:** Being adjacent to TEM Close to D100 motorway, suburban train & light rail network (in project stage) & Atatürk International Airport
- **Visibility:** Visibility from TEM
- **Size:** Ample space for leisure, cultural, commercial activities
- **Vistas:** Küçükçekmece Lake Marmara Sea Vistas
- **Stream:** Rehabilitated Menekşe Stream
- **Topography:** Ridge Hillsides Bevels
- **Slopes:** Flat Surfaces Steep slopes
- **Near Surrounding:** Olympic Village Küçükçekmece Lake
- **Restrictions of the Site** Visual and noise pollution: Noise and visual pollution of TEM Garbage
- **Dumb Areas:** In situ rehabilitation of garbage

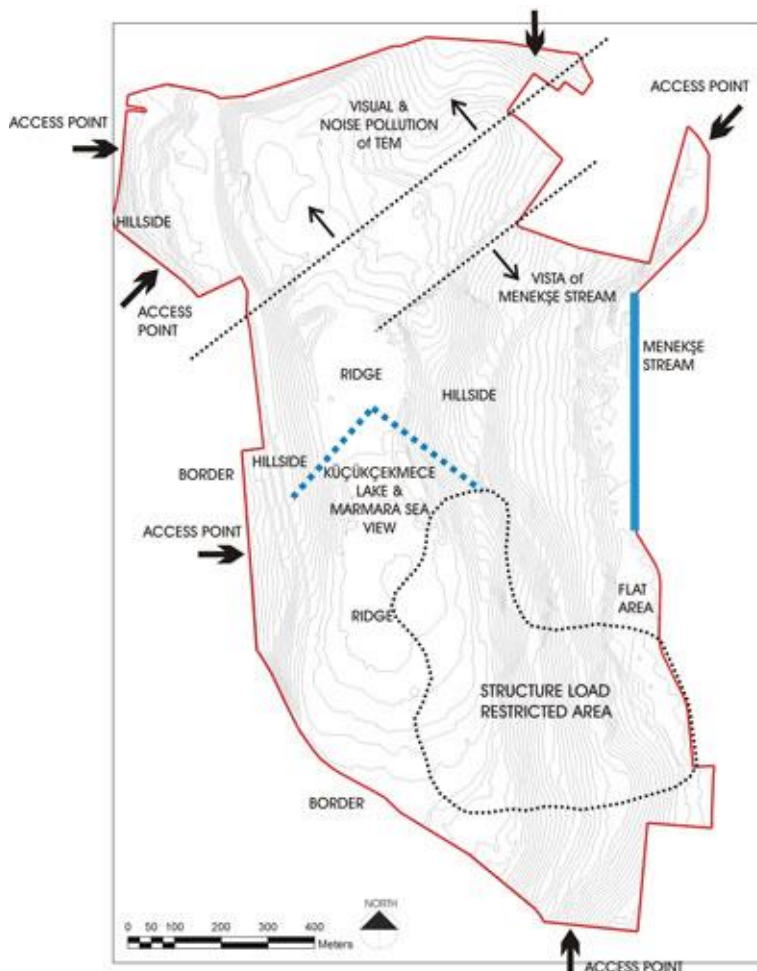


Fig. c 10 site potential

Development plan

A development plan which had already been approved by the public authorities is to be followed as the most determinant one at this point. According to this development plan, the Site is designated to a special project area of which planning and design considerations are defined just peculiar to the Site.

According to the Development Plan Notes the site is defined based on two uses; theme park and other facilities. These uses are only distributed within m2 calculations, not spatially. In the plan notes Floor Area Ratio (FAR) for the site is defined as 0.3, but Theme Park construction areas are not included in FAR. Theme park and its uses may cover 150.000 m2 whereas other uses may be spread to 450.000 m2 construction areas aboveground. In addition, ½ of their construction areas that may come up because of the slope may be used for commercial purposes. Underground construction areas should only be used in the areas that they are defined for; 75.000 m2 underground construction area for theme park and 225.000 m2 underground construction area for other uses. Entrance levels of the buildings are to be assigned with reference to the inner roads at site.

Besides in the plan notes there is no restriction for the height of buildings.

In the existing Development Plan the Project area is defined as “Special Project Area” and 6th plan note is about this site. Here:

- Floor Area Ratio (FAR) for the site is 0.3.
- The allocation of the activities in between the theme park and others should be according to a preliminary project
- Commercial uses in the underground that will come up because of the slope cannot exceed 50% of the construction area and these areas may be settled in and are not included in the construction area.
- The construction areas for recreational uses in the Theme Park are excluded in TAKS (total construction area ratio) and KAKS (closed construction area ratio) calculations.
- Aboveground construction area for the activities listed in Theme Park should be maximum 10% of total construction area.
- Activities listed in Theme Park are commercial units such as restaurants, cafés, kiosks; cultural facilities such as shopping and fair and exhibition centers, showrooms, cinema, theatre, amusement park, zoo, museum, exhibition saloons; gyms such as swimming pool, ice skate field, shooting gallery, squash; and other functions such as entertainments with water, aquatics, hobby gardens and any supportive activities, either by areas or structures.
- Apart from Theme Park, other activities such as housing, hotel, motel and residence, offices and office centers, bank and financial corporations, commercial units such as restaurants, cafés, kiosks; cultural facilities, shopping and fair and exhibition centers, showrooms, cinema, theatre, amusement park, zoo, museum, exhibition saloons; gyms such as swimming pool, ice skate field, shooting gallery, squash; and other functions such as entertainments with water, aquatics, hobby gardens and any supportive activities, either by areas or structures and any supportive activities, either by areas or structures are introduced.
- 10 m from roads and 25 m from stream route are set as compulsory set backs.
- There is an overall building height regulation throughout the site as “free” (h= free). Size and dimension of masses as well as floor heights are to be determined in the architectural preliminary drawings to be developed following to the master plan.

- In the “Special Project Area” commercial underground car parks may be constructed in order to fulfill the car park requirements. These areas will be determined by urban design projects based on the opinions of related directorates and the surface will be left appropriate for vegetation.
- Entrance levels of the buildings are to be assigned with reference to the inner roads at site. Reaching to the “natural level” by excavating the fillings that had previously been piled into the site, may also be applicable.
- Multilevel car parking garages over the ground level can be allocated at site for only that purpose, however total construction area for those is to be maximum 10% of the whole building at the Site, and will be exempt from the floor area calculation.

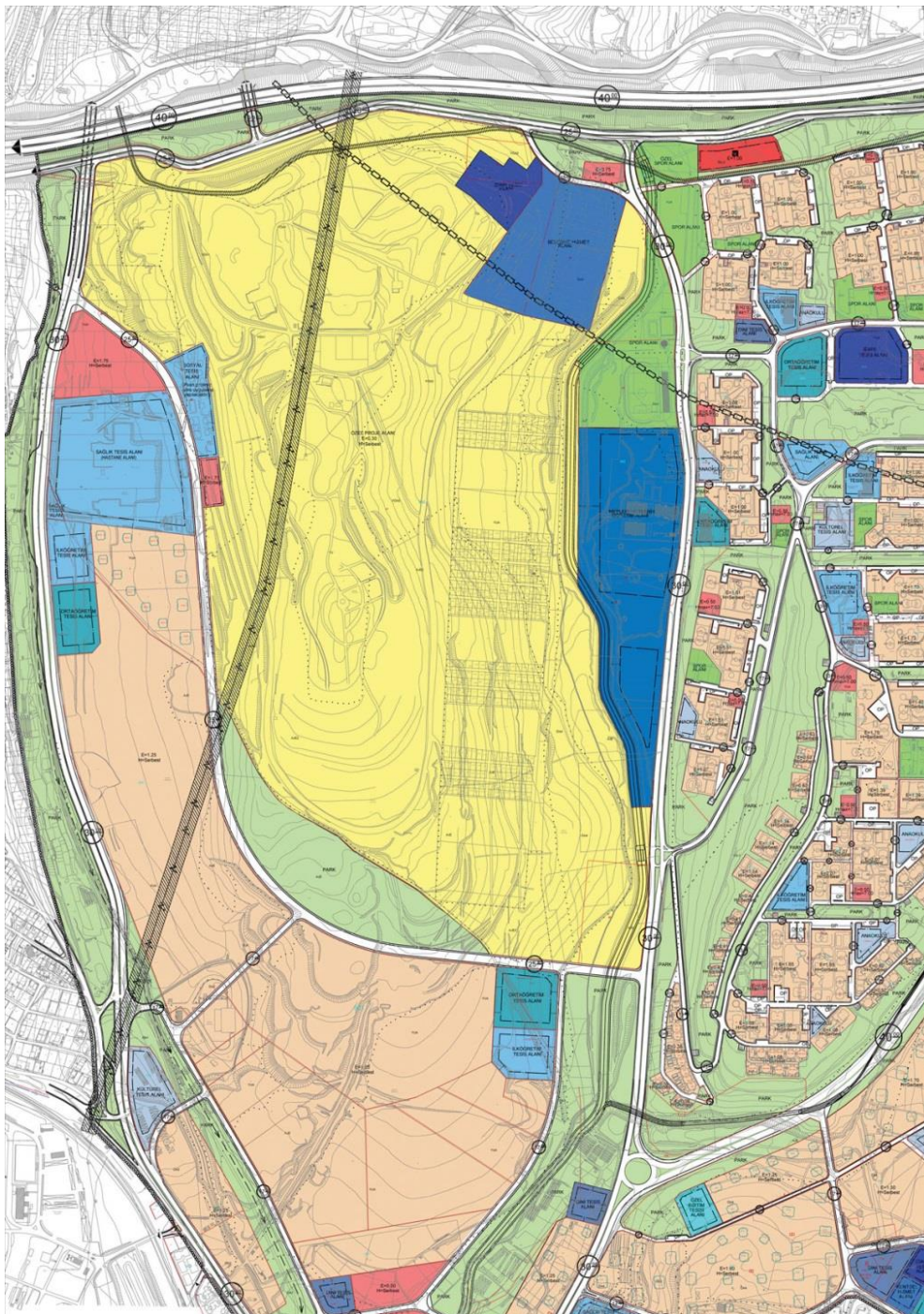


Fig. c 11 development plan

Planning & Design Principles

The planning and design principles are intended to encourage future, innovative design concepts and to create a better place to work, to live, to recreate.

Designers' planning and design considerations should:

make the most efficient use of the site,

make a positive contribution to its surroundings

have a sense of identity and place appropriate to the character of the Site and İstanbul

include a design approach to:

- Promote multi-modal transportation
- Prioritize walking, cycling and public transport
- Minimize the need to use cars;
- Encourage integration with its surrounding with a comprehensive movement network
- Deliver a high quality of life in terms of amenity, safety and convenience;
- Present an attractive, well-maintained appearance, with a distinct sense of place
- Provide a good allocation of activities, where and when they are needed and that are easily accessible;
- Provide allocation of activities to minimize transport demand;
- Provide allocation of activities to maximize the adequate use of land
- Promote social and physical integration

Land Appraisal

Keywords for the layout and design of land appraisal:

- Allocation of activities
- Compact
- Mix land use
- Mix-use
- Interaction
- Proximity
- Adaptability

Land appraisal is the practice of developing an opinion of for the location of various activities based on the best use within the site. Land appraisal aims to position best activity to the best suitable location. The land appraisal should be convenient to the physical features of the site, transport and amenities. The following design principles should influence the layout and design of land appraisal:

- Provide allocation of activities to minimize transport demand and maximize the adequate use of land and synergy

- Support compact development.
- Compact development supports transit viability and modes of travel other than the automobile. It also allows for the preservation of open space and more efficient use of infrastructure.
- Encourage the development of a well balanced mix land use
- Mix land uses by locating homes, businesses, schools and recreational opportunities in closer proximity
- Mixed land use will provide alternatives to driving such as walking and biking while increasing transit viability.
- The resulting increased number of people on the street can enhance the vitality and perceived security of an area.
- Focus higher density living, employment, community services and social interaction
- Create/ promote reserve areas for further developments
- Promote stages of development, different construction phases
- Provide well - integrated activities and higher densities
- Provide variety of intensified mixed uses comprising retail, commercial, entertainment and residential accommodation.
- Mixed-use can enhance the economic vitality and perceived security of an area by increasing the number of people on the street and in public spaces
- Provide employment opportunities, and homes within close proximity
- Provide sufficient lands for activities
- Mixed land use promotes active transport between different activities by locating origins and destinations close to each other
- Position activity areas of different sizes and locations to adapt to changing economic trends and to capture emerging sectors of growth and innovation

Access & Movement

Keywords for the layout and design of access and movement are:

- **Connectivity and permeability:** Convenient access needs to be provided between and within activities
- **Sustainability:** Priority should be given to the needs of walking, cycling and public transport;
- **Safety:** Streets, paths and cycle routes should provide for safe access by users of all ages and degrees of personal mobility;
- **Legibility:** It should be easy for both residents and visitors to find their way around the area;
- **Mobility:** Maximize the efficiency of internal and external movement of goods and people.
- **Flexibility / Adaptability** Future proof the site so that innovations and changes in transportation of goods and people can be accommodated e.g., changes in truck sizes; future increased use of rail; increased public transit availability associated with population growth.

Transportation is one of the major and vital functions. The reinforcement and upholding the area as a transportation node is crucial. The current stations, bus terminals and motorway exits, crossroads should all be retained or consolidated where possible. Maintaining an efficient transportation network within the project



area and well integration and connection with its surrounding; and support of existing transportation modes is necessary.

Extension of light rail system and/or monorail to the Project site may be considered to assist better circulation and improve connectivity. The following design principles should influence the layout and design of access and movement:

- Promote multi-nodal transportation systems
- Provide a highly pedestrian oriented use
- Interface between pedestrians and vehicles should be minimized as far as possible by providing pedestrianized areas where appropriate including pedestrian precincts, observation points, decks, and footbridges. Ramps with railing shall be provided where appropriate.
- Promote easy mobility for all, including those using wheelchairs and pushchairs should be taken into account.
- Create adequate location and amount of outdoor and underground parking for cars and cycles
- Provide safe, convenient, and efficient access to parking areas for vehicles and pedestrians
- Design for maximum accessibility
- Enhance pedestrian connections between activities
- Create a comprehensive network for pedestrian circulation serving as linkages, both vertically and horizontally, between and in facilities at ground, underground and elevated levels, where appropriate should be provided from facilities to and from various transportation nodes.
- Encourage pedestrian circulation along streets and in parks, which are to be designed to facilitate comfortable pedestrian movement in an interesting, active and well designed public realm
- Create links to the existing road network in the surrounding
- Access to rail-based public transport
- Establish direct walking and cycling routes to local facilities
- Promote maximum permeability for pedestrians and cyclists
- Provide circulation routes for public service (buses, waste collection) and delivery vehicles within the area;

Amenity

Amenities are goods and services that make locations particularly attractive for living and working. Amenities, which exist at various geographic scales, influence quality of life or social well-being. Moreover, they influence the consumption decisions of households, the production decisions of firms, and the location decisions of both economic agents. There are a variety of amenities which create urban environments that maintain and enhance the livability of a community: Open Space, Scenic Areas, Natural Resources, and Recreation Areas.

The following design principles should influence the layout and design of amenities:

- Provision of open spaces as far as possible.
- Safety for all users should be a high priority. A safe environment will be used by more people and for longer, enhancing the vitality of the area and extending the effective utilization of facilities.

- Creating flexible, partially covered, gathering areas allowing for activities and performances.
- Provision of different forms, such as promenades, plazas, pocket parks, observation points, covered walkways and roof-top gardens which are to be provided at various levels
- Visible, safe and easily accessible
- Creating continuous, paved promenades should be provided with the design
- Taking advantage of the topography of the area which may permit diversified views
- Provision of view corridors and ventilation corridors to optimize the leisure opportunities and pleasure
- Reflecting the local climatic identities.
- Usage of landscape elements to achieve desired functions and spatial effects such as:
 - Limiting or directing views;
 - Establishing an ecologically responsible, fiscally prudent landscape;
 - Creating microclimates;
 - Framing spaces to create compositional enclosure;
 - Reinforcing the image;
- Defining major open spaces, circulation corridors, and entrances.

The components of amenities are as follows:

- noise and vibration
- nuisance effects
- open space
- vegetation
- landscape
- character of neighborhoods
- visual amenity and views
- public and person safety

Master Plan Progress Meeting

In meeting the objectives of "Istanbul Theme Park" project master plan, the developer consortium invited 5 internationally recognized Architectural practices experienced in master planning to gather IDEAS. This invitation only commissioning was led by Prof. Dr. Suha Özkan of METU, a prominent figure in Architectural World who has been the Secretary General of 'The Aga Khan Award for Architecture' in Geneva, Switzerland since 1991.

The selected teams were CivicArts of London, UK; Edward Cullinan Architects of North London, UK; HOK of Chicago, USA; Gensler of Santa Monica, USA; Nikken Sekkei of Tokyo, Japan. On May 23rd-25th 2011, all teams presented their IDEAS to the developer consortium at meetings held in Istanbul, Turkey.

The consortium members and the advisory board led by Prof. Dr. Süha Özkan selected the American firm, Gensler, to develop the final scheme for the project. Here, in this web portal, you may review all the proposed IDEAS which the consortium believes are worth spreading.

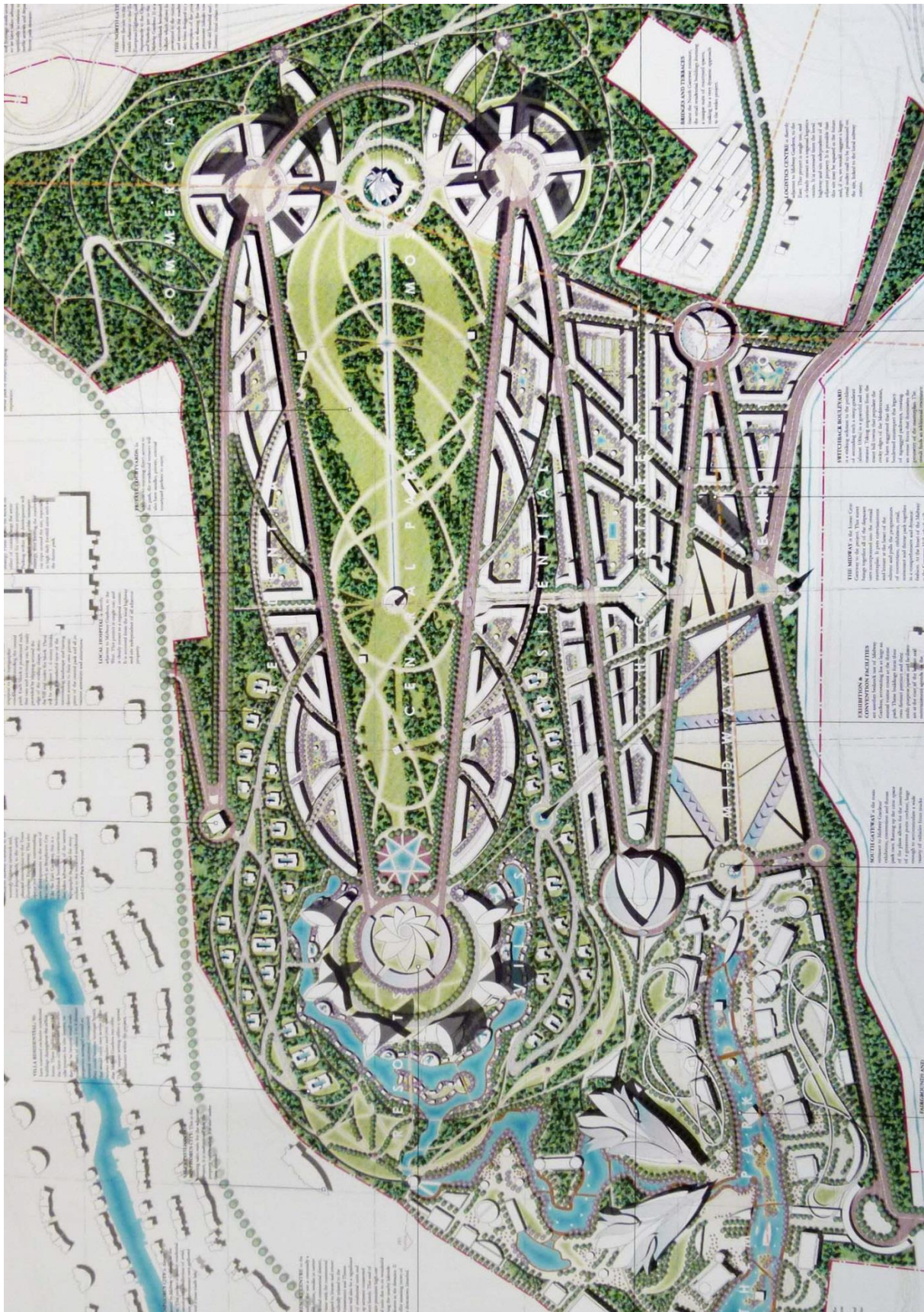


Fig. c 12 Civic art masterplan



Fig. c 13 Cullinan masterplan

June 20, 2014



Loredana Gal- METU/714
Theme Parks impact on regions



Fig. c 14 Hok masterplan



Fig. c 15 Gensler masterplan

Loredana Gal- METU/714
Theme Parks impact on regions



1 Conceptual Master Plan
ISTANBUL THEME PARK

Fig. c 16 Sekkei masterplan

CASE STUDY:

ANKARA KINGDOM OF THE WILD

About the city

Ankara (Turkish pronunciation: [ˈaŋ.ka.ra]; historically known with the names Ancyra and Angora) is the capital of Turkey and the country's second largest city, Istanbul being the largest. The city has a mean elevation of 938 meters (3,077 ft) and has a population of 4,338,620, with its metropolitan municipality having 4,965,542 as of 2012.

The city is very old, containing various Hittite, Phrygian, Hellenistic, Roman, Byzantine, and Ottoman archaeological sites. The hill which overlooks the city is crowned by the ruins of the old castle, which adds to the picturesqueness of the view, but only a few historic structures surrounding the old citadel have survived to the present day. There are, however, many well-preserved remains of Hellenistic, Roman and Byzantine architecture, the most remarkable being the Temple of Augustus and Rome (20 BC) which is also known as the Monumentum Ancyranum.

Historical events

Following the Ottoman defeat at World War I, the Ottoman capital Constantinople (modern Istanbul) and much of Anatolia were occupied by the Allies, who planned to share these lands between Armenia, France, Greece, Italy and the United Kingdom, leaving for the Turks the core piece of land in central Anatolia. In response, the leader of the Turkish nationalist movement, Mustafa Kemal Pasha, established the headquarters of his resistance movement in Ankara in 1920. After the Turkish War of Independence was won and the Treaty of Sèvres was superseded by the Treaty of Lausanne, the Turkish nationalists replaced the Ottoman Empire with the Republic of Turkey on 29 October 1923. A few days earlier, Ankara had officially replaced Constantinople as the new Turkish capital city, on 13 October 1923.

After Ankara became the capital of the newly founded Republic of Turkey, new development divided the city into an old section, called Ulus, and a new section, called Yenışehir. Ancient buildings reflecting Roman, Byzantine, and Ottoman history and narrow winding streets mark the old section. The new section, now centered on Kızılay Square, has the trappings of a more modern city: wide streets, hotels, theaters, shopping malls, and high-rises. Government offices and foreign embassies are also located in the new section. Ankara has experienced a phenomenal growth since it was made Turkey's capital. It was "a small town of no importance"[13] when it was made the capital of Turkey. In 1924, the year after the government had moved there, Ankara had about 35,000 residents. By 1927 there were 44,553 residents and by 1950 the population had grown to 286,781.

Population

Ankara had a population of 75,000 in 1927. In 2013, Ankara has a population of 5,045,083 of which 2,507,525 are men and 2,537,558 are women.[16]

When Ankara became the capital of the Republic of Turkey in 1923, it was designated as a planned city for 500,000 future inhabitants. During the 1920s, 1930s and 1940s, the city grew in a planned and orderly pace. However, from the 1950s onward, the city grew much faster than envisioned, because unemployment and poverty forced people to migrate from the countryside into the city in order to seek a better standard of living. As a result, many illegal houses called *gecekondu* were built around the city, causing the unplanned and uncontrolled urban landscape of Ankara, as not enough planned housing could be built fast enough. Although precariously built, the vast majority of them have electricity, running water and modern household amenities. Nevertheless, many of these *gecekondus* have been replaced by huge public housing projects in the form of tower blocks such as Elvankent, Eryaman and Güzelkent; and also as mass housing compounds for military and civil service accommodation. Although many *gecekondus* still remain, they too are gradually being replaced by mass housing compounds, as empty land plots in the city of Ankara for new construction projects are becoming impossible to find.

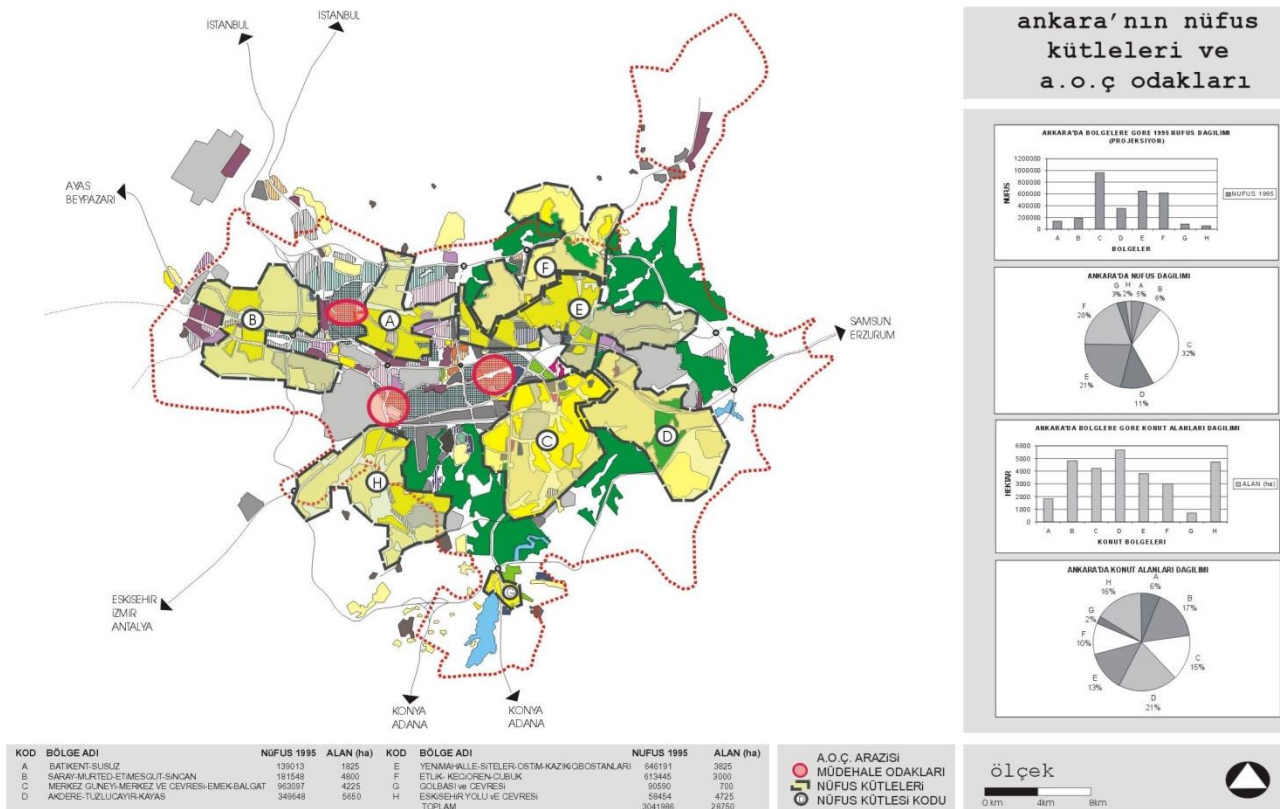


Fig. d 1- Ankara demographic chart

Climate

Due to its elevation and inland location, Ankara has a dry summer continental climate, with cold, snowy winters and hot, dry summers. Rainfall occurs mostly during the spring and autumn. Under Köppen climate classification, Ankara has a dry summer continental climate with a hot summer subtype (Dsa), near the borderline of a cold semi-arid climate (BSk), with some regions of the province having a warm summer subtype (Dsb) of continental climate, depending on elevation.[14] Because of Ankara's high altitude and its dry summers, nightly temperatures in the summer months are cool. Ankara's annual average precipitation is fairly low at 408 millimeters (16 in), nevertheless precipitation can be observed throughout the year. Monthly mean temperatures range from 0.3 °C (32.5 °F) in January to 23.5 °C (74.3 °F) in July, with an annual mean of 12.02 °C (53.6 °F).

Climate data for Ankara (1960–2012)													[hide]
Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Record high °C (°F)	16.6 (61.9)	19.9 (67.8)	26.4 (79.5)	30.6 (87.1)	33.0 (91.4)	37.0 (98.6)	41.0 (105.8)	40.4 (104.7)	36.0 (96.8)	32.2 (90)	24.4 (75.9)	19.8 (67.6)	41 (105.8)
Average high °C (°F)	4.3 (39.7)	6.4 (43.5)	11.7 (53.1)	17.2 (63)	22.2 (72)	26.6 (79.9)	30.2 (86.4)	30.2 (86.4)	26.0 (78.8)	19.9 (67.8)	12.8 (55)	6.6 (43.9)	17.84 (64.12)
Daily mean °C (°F)	0.3 (32.5)	1.8 (35.2)	6.1 (43)	11.3 (52.3)	16.1 (61)	20.2 (68.4)	23.5 (74.3)	23.3 (73.9)	18.7 (65.7)	13.1 (55.6)	7.1 (44.8)	2.7 (36.9)	12.02 (53.63)
Average low °C (°F)	−3.0 (26.6)	−2.2 (28)	1.0 (33.8)	5.7 (42.3)	9.7 (49.5)	13.0 (55.4)	16.0 (60.8)	16.0 (60.8)	11.9 (53.4)	7.4 (45.3)	2.5 (36.5)	−0.6 (30.9)	6.45 (43.61)
Record low °C (°F)	−21.2 (−6.2)	−21.5 (−6.7)	−19.2 (−2.6)	−6.7 (19.9)	−1.6 (29.1)	4.7 (40.5)	6.8 (44.2)	6.3 (43.3)	2.5 (36.5)	−3.4 (25.9)	−10.5 (13.1)	−17.2 (1)	−21.5 (−6.7)
Precipitation mm (inches)	41.8 (1.646)	36.9 (1.453)	38.7 (1.524)	49.0 (1.929)	51.2 (2.016)	35.4 (1.394)	14.5 (0.571)	10.9 (0.429)	18.5 (0.728)	30.2 (1.189)	33.9 (1.335)	46.9 (1.846)	407.9 (16.06)
Avg. precipitation days	11.7	11.0	10.9	12.0	12.5	8.6	3.8	2.8	3.8	7.1	8.6	11.8	104.6
Mean monthly sunshine hours	77.5	98.9	161.2	189.0	260.4	306.0	350.3	328.6	276.0	198.4	132.0	71.3	2,449.6

Source: Turkish State Meteorological Service^[15]

Record rain= 88.9 kg/m2 (11.06.1997)

Record snow= 30.0 cm (11.8 in) (05.01.2002)

Fig. d 2- Climate data for Ankara

Transportation

Esenboğa International Airport, located in the north-east of the city, is Ankara's main airport. Ankara Intercity Bus Terminal (Turkish: Ankara Şehirlerarası Terminal İşletmesi, AŞTİ) is an important part of the bus network which covers every neighbourhood in the city.

The Ankara Central Station is a major rail hub in Turkey. The Turkish State Railways operates passenger train service from Ankara to other major cities, such as: İstanbul, Eskişehir, Balıkesir, Kütahya, İzmir, Kayseri, Adana, Kars, Elâzığ, Malatya, Diyarbakır, Karabük, Zonguldak and Sivas. Commuter rail also runs between the stations of Sincan and Kayaş. In 2009, the new Yüksek Hızlı Tren high-speed rail service began operation between Ankara and Eskişehir. On 23 August 2011, another Yüksek Hızlı Tren high-speed rail line commercially started its service between Ankara and Konya.

The Electricity, Gas, Bus General Directorate (EGO)[28] operates the Ankara Metro and other forms of public transportation. Ankara is currently served by suburban rail and two subway lines with about 300,000 total daily commuters, and three additional subway lines are under construction.



A gondola lift with four stations and 3.2 km (2.0 mi) long connects the district of Şentepe to Yenimahalle metro station.

A.O.Ç AREA

History

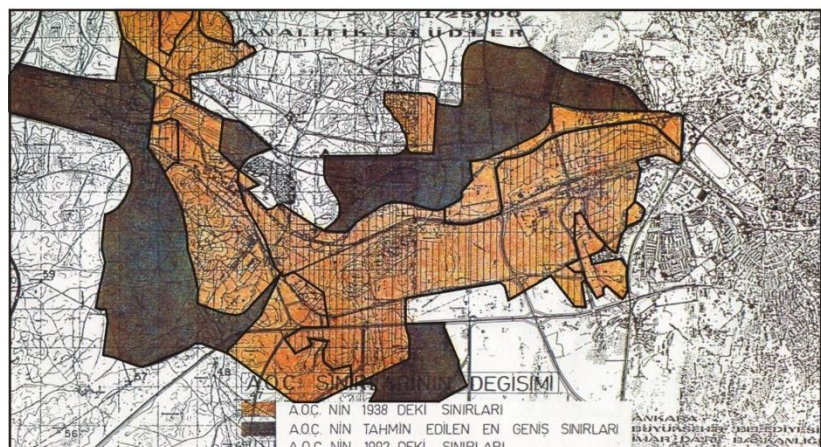
Atatürk Orman Çiftliği is a complex structure composed of different functions and objectives, established by Atatürk as Gazi Forest Farm in May 25, 1925, after the establishment of Ankara as the capital of Turkey, in order to improve the agricultural production and search for technological methods, creating in the same time a green recreational area.

OBJECTIVES:

- Develop modern and innovative methods of cultivation
- Investigate and develop new species of grains and variety of animals
- Produce and investigate native and/or foreign fruit variety
- Evaluate the agricultural products
- Work with the villagers in cooperatives
- Develop viticulture
- Establish atelier for production and repairs of agricultural machinery
- Improve mechanization in agriculture
- Meet the internal and external market demand
- Provide sale stores
- Provide open and green areas for walk, rest and intertainment
- Educate and train students.

The bought area was initially of 20.000.000 m² and increased further up to 150,000,000 m². In June 1937, the area was given to the Treasury, summarizing the activities, objectives and expectations of the State Fram trough a testament letter.

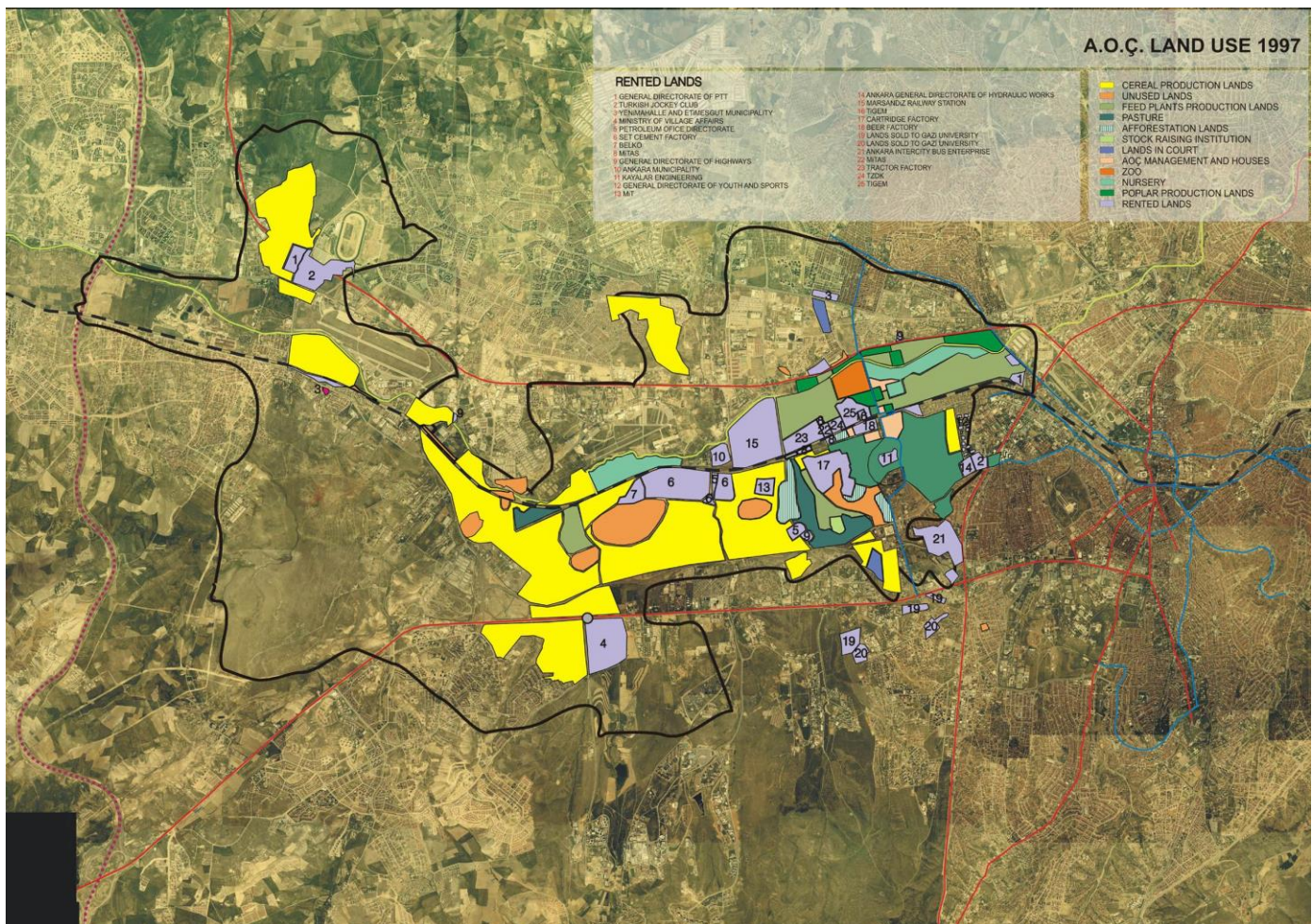
In June 1938 the area was undertaken by the State Agricultural Management Institution governed by the law 3308. During the 11 years of management, approximately 5,000,000 m² of land have been sold. In June 1949, with the law 5433 the State Agricultural Management Institution and the Agricultural Mills were unified under the State Production Farms. In March 1950 was undertaken by teh Ministry of Agriculture and Rural Affairs, with the specific law 5659.



Problems

- LAW 5659 PROBLEMS -inadequate content of State Fram Law concerning selling, renting and/or assigning farmland -the establishment purposes of the State Fram were not determined -unsatisfactory organization and description of responsibilities -financial problems because of lack of methods to change to current requirements
- LAND PROBLEM -land transfers - land transferwith a special law - land transfer with protocol - rented lands - transfer by Development Plans - Occupation of Aoç lands
- HISTORICAL AND NATURAL SITE DISTRICTE - May 1998- Ankara Cultural and Natural Assest Conservation Council (AKTVKK) determined Aoç Lands 1° degree Historical and Natural Site District

Fig. d 4 Aoç Land use



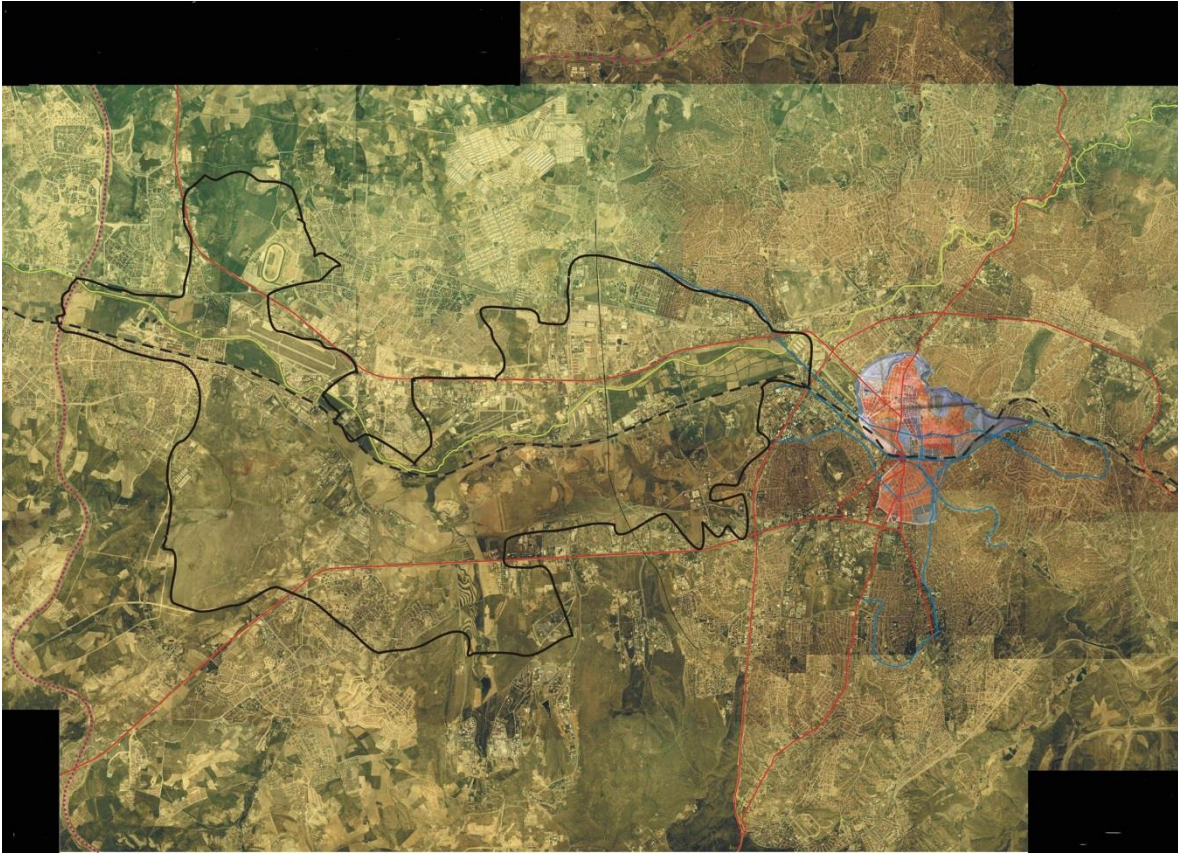


Fig. d 5 Aoc land development



Fig. d 6 Aoc land development



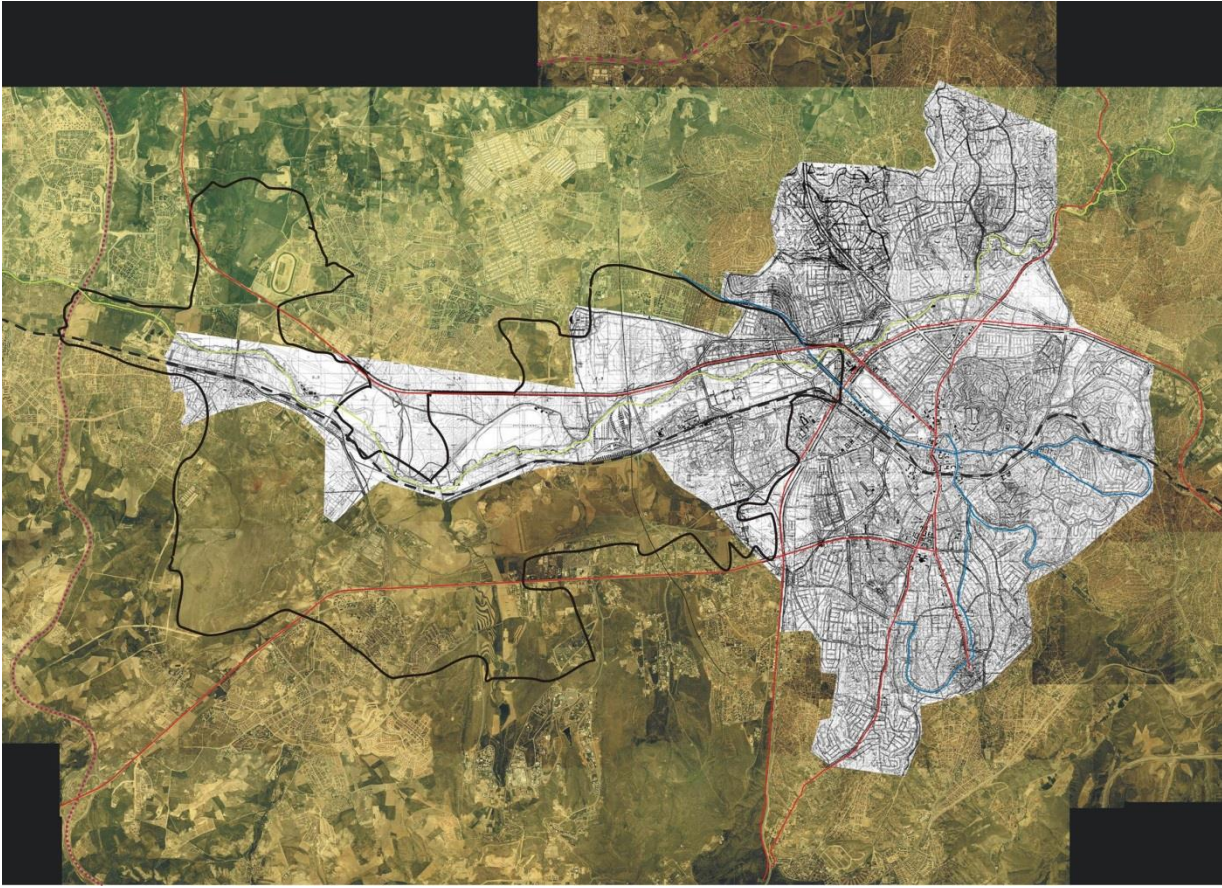


Fig. d 7 Aoç land development

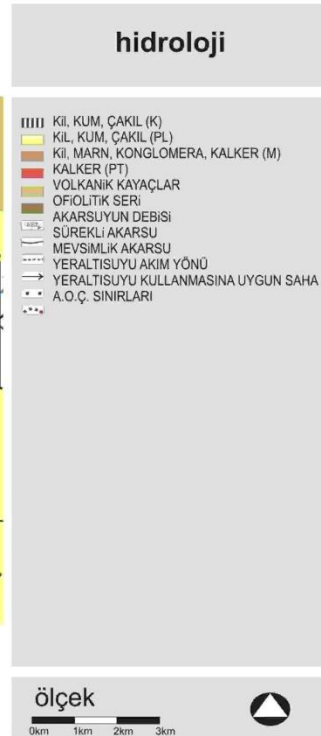
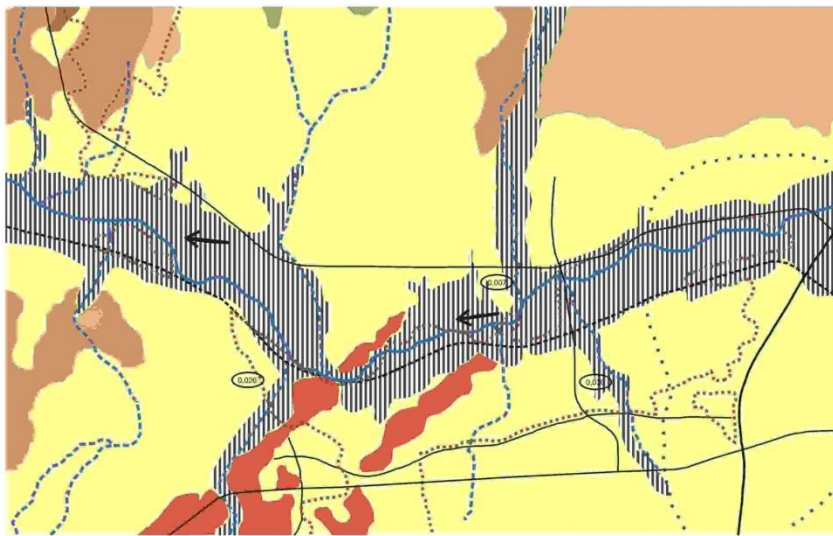


Fig. d 8 Aoç Hydrologic network

Ankara kingdom of the wild

Part of the development and new organization of the Aoç area is the creation of a Theme park that can bring tourists and now attraction to the city on one side, and that could integrate the abandoned zoo existing in the area.

Citizens are worried about transforming this cultural and symbolic area, positioned centrally, and with great potential in the future development of the capital, into just a fun area, ruining the image of the park and in the same time the ecological function it has.

The project was designed by the Thinkell Group in 2012.

About the park

Ankara Kingdom of the Wild is divided into three distinct parks:

Mysteria – an amusement park based on fictional creatures

- Prehistoria – a dinosaur theme park
- Animalia – a state-of-the-art zoo experience



Fig. d 9 Ankara Kingdom of the Wild Masterplan

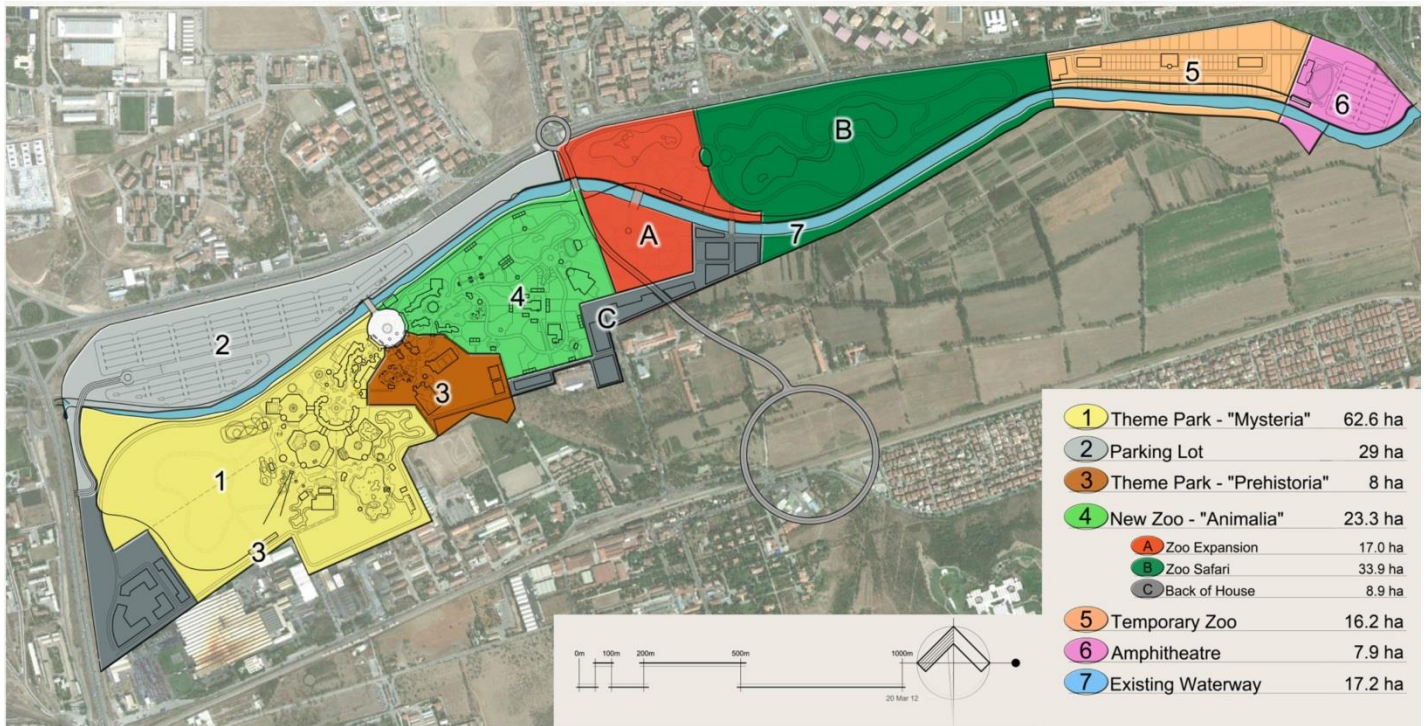


Fig. d 10 Ankara Kingdom of the Wild Usage plan

Mysteria

Mysteria is a one-of-a-kind amusement park experience. Custom themed to an enchanting fantasyland full of adventure, surprise and discovery, the park is rich with whimsical character and e!ervescent charm, and is organized into "ve distinct zones, each with its own thematic overlay that stems from the "ctional back-story.

These unique adventure zones include:

- › Discovery Walk
- › Discovery Hub
- › Enchanted Earth
- › Sea of Mysteria
- › Valley of Flight

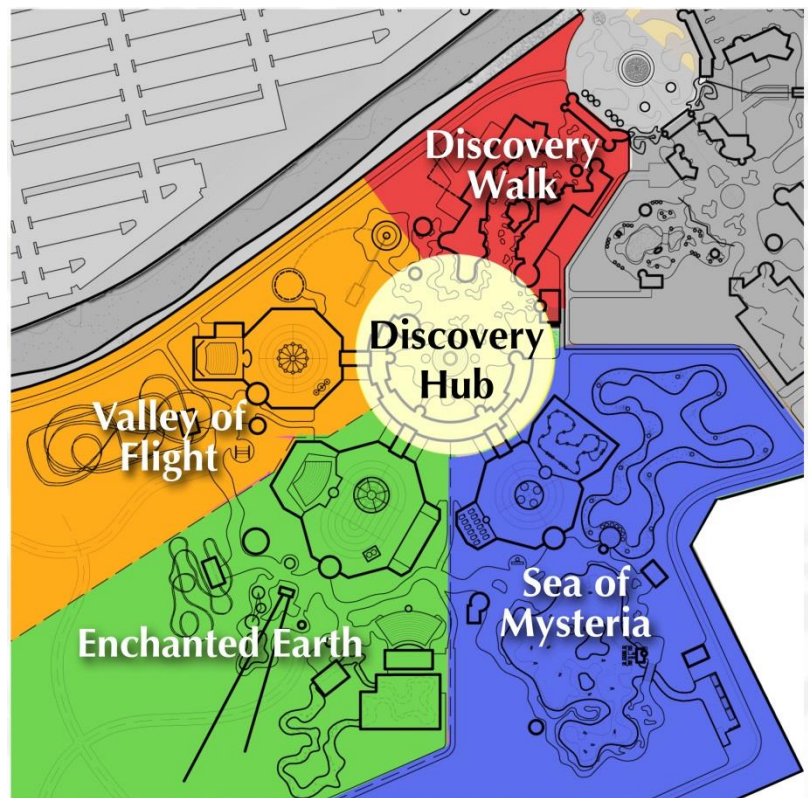


Fig. d 11 Mysteria Plan

Prehistoria

Within this immersive Jurassic environment guests will find a number of exciting dinosaur themed rides and attractions, like:

- Indoor attractions:
 - Jurassic Flight, a virtual flying attraction where guests travel 150 million years into the past to experience the sights, sounds, and movement of a Pteranodon (a large bird-like creature) as it soars over lush jungles, through deep canyons and along a primeval coastline, bursting with life
 - Dinosaur Territory, a stunning, immersive experience that welcomes guests into a high-tech research facility where they come face-to-face with various living dinosaurs, from adorable babies to terrifying predators.
- Outdoor attraction
 - Flying Pterodactyls, an exciting flying ride where smaller kids can soar up and down through the air in a fun and fanciful dinosaur flight
 - Dinosaur Dig Zone, a highly interactive adventure play area with a number of dynamic dino-play areas that include a mysterious cavern, a tree top fun zone, and a dino fossil dig site

Prehistoria also features unique food & beverage and retail offerings that complement the Jurassic theme of the park.

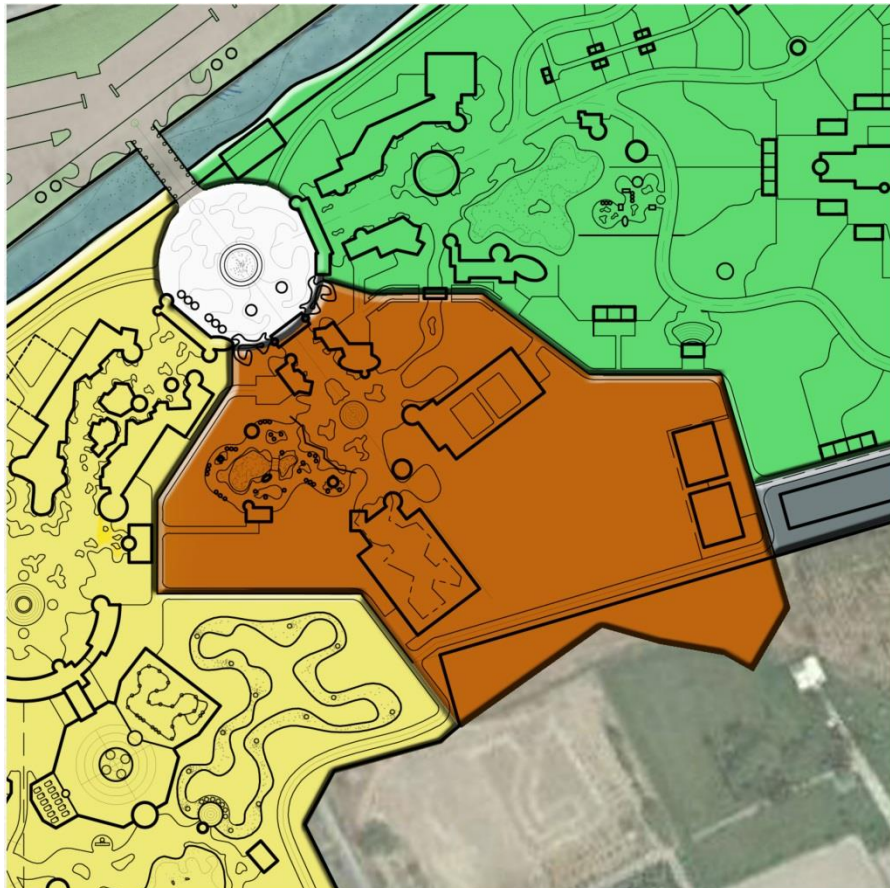


Fig. d 12 Prehistoria Plan

Animalia

Approach

Sharing the property with Prehistoria and Mysteria is Animalia, a zoo experience unlike anything in Turkey. At Animalia guests find themselves immersed in a wild world full of wonder where they can not only observe creatures in their natural habitats, but can also get close enough to feel their character, understand their power, and be touched by their beauty.

What makes Animalia so unique is its modern approach to animal interactivity. Unlike other zoos that offer very little in terms of direct interaction, Animalia puts the guest at the heart of the experience as close as physically possible to the animals in order to create an unforgettable one-of-kind animal adventure – an adventure free of visible barriers like unsightly bars or cages.

Organization

Animalia is organized into a number of distinct habitats and experiences that include:

- Animalia Orientation Center
- Garden Walk
- Fanciful Flight
- Crocodile Cove
- Wonders of the Water
- Polar Experience
- Jungle Island
- Tiger Trek & Wild Wanderers
- Curiosity Caves
- Animalia Safari
- Animalia Petting Zoo & Animal Shows
- Zoo Keeper Care Center

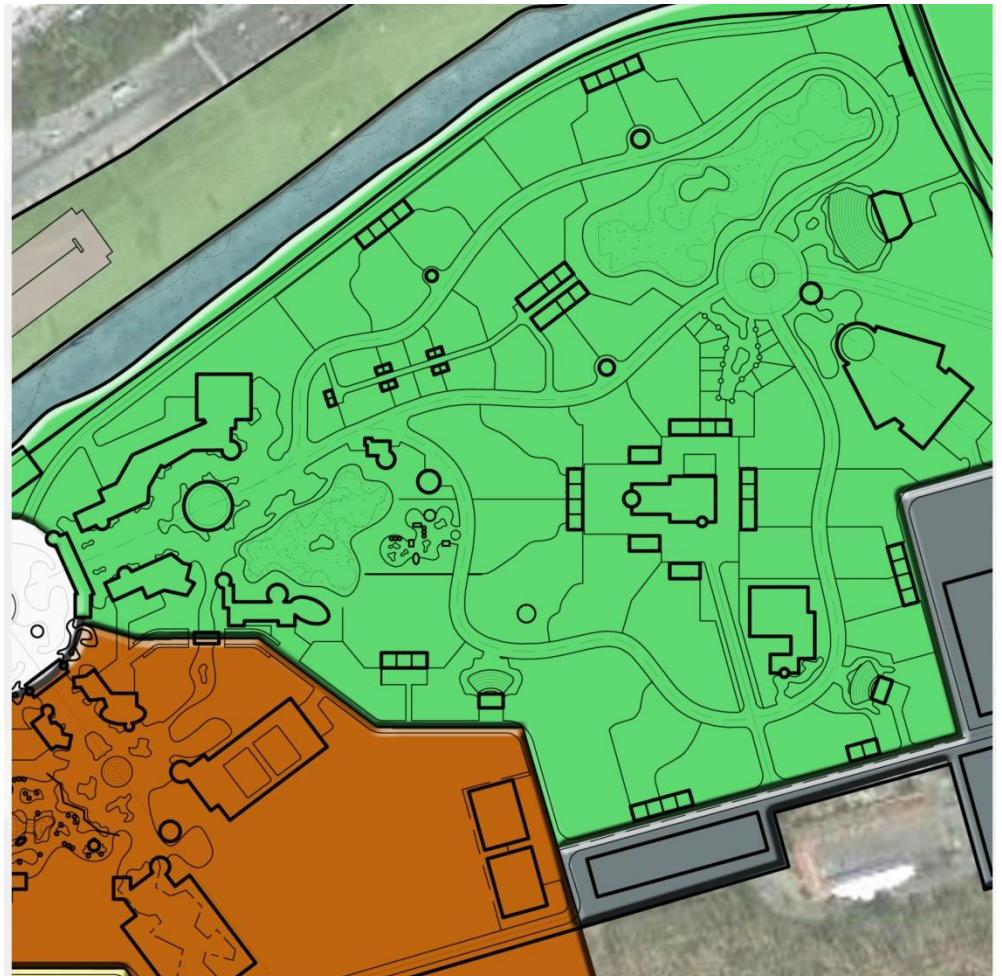


Fig. d 13 Animalia plan

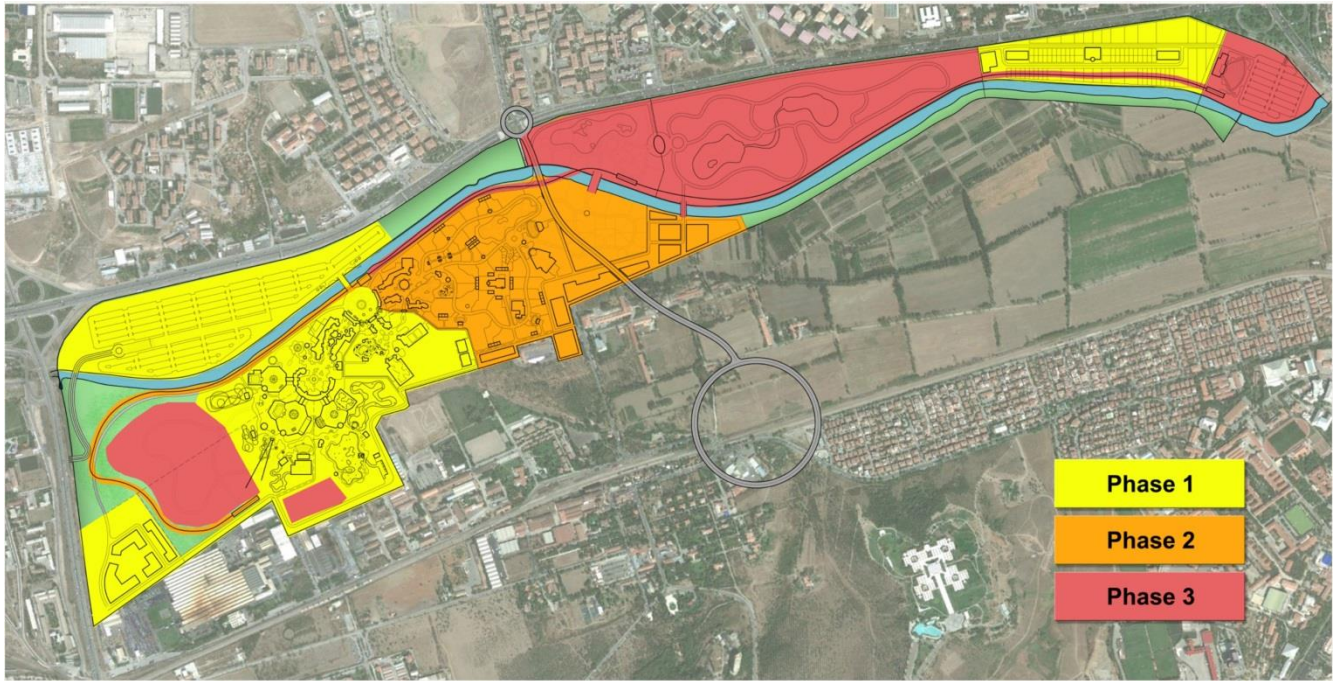


Fig. d 14 Phasing plan



Fig. d 15 Attraction location plan

Conclusion

Several impacts of theme parks on regions are discussed in the chapters above. After naming the most important impacts, what is the quintessence from all this? It is doubtless to say that tourism increases the region's economic balance of services – foreign money is brought into the region which had less income without tourism. Up to a critical point, tourism promotes the regions welfare. Beyond this point, the region suffers from overuse of the nature or generally spoken, negative externalities.

From a regional perspective, theme parks agglomerate the regions touristic industry and activities. Theme parks allow regions to split their industrial activity spatially. While some parts of the region underlie heavy touristic use, it would be possible to encourage other branches of industry in the other, or even to act considerably with the nature and the ecology. This is only possible, when the tourist dollars spent are reallocated across the whole region, e.g. by taxes and benefit payments.

From my perspective, it is the task of politicians to avoid social inequality by introducing laws or acts which limit the amount of touristic activity to a regional “desirable” and reconcilable level.

Theme parks in comparison USA – Europe

How is the different development in those two continents possible ? What are the reasons for the fact, that the theme park industry is so mature in the US and relatively new in Europe ? Which development can be seen respectively expected in the future ?

First of all, we will summarize some aspects, which definitely have to be made when a comparison of the situation of theme parks in the USA and Europe is being made:

1.) The American way of how to consume spare-time differs strongly from the European way.

Europeans mostly prefer relaxing in their spare-time, while the typical American wants to consume attractions and fun - in an from European sight unbelievable short nperiod of time. From an European perspective, this has to be considered as leisure time stress.

In Europe, the tourist business is characterized by a wide variety of different opportunities, while in the US, the opportunities lack in respects to variety. For example, the missing of a regimen industry, which we know in Europe, in particular in Austria and Italy, expresses that.

On the other hand, the situation of insufficiency in types of recreation opportunities supported the development of the theme park industry in the U.S.

2.) The missing of cultural sites embosses the theme park industry in the U.S.

a.) The U.S. show “historical reviews” or “historical landmarks” which are contemplated by Europeans without any understanding. Houses and Sites built in 1890 do not have such a high “historical” status in Europe than they have in the U.S.

b.) Foreign culture and their histories, respectively the European and Arabic ones, are simplified to an extremely basic level, which does not seem to be justifiable from a European perspective. A drastic example is “Bush Garden’s” theme park in Orlando, Florida. The “amusement area” of the park is called “Timbuktu” (named after the city in West Africa), and it contains a brewery, designed in a Bavarian “Bierhaus”-style. Accordingly, the Americans associate Alcoholic beverages, more exactly beer, with an Islamic Country!

3.) Regarding the transferability of recreation parks of the U.S.-style, Europe’s recreation industry is considered as lagging behind the one in the U.S. It has to be doubted if facilities of the size of Disneyland or Walt Disney World are economically viable in Europe.

The number and the geographical density of cultural attractions in Europe is immensely high and portrays an strong competitor to theme and recreation parks. “Fancy fair”-facilities are familiar to the Europeans already, so parks who specialize on this aspect of theme parks only, are not going to present something unique and new. Therefore, the long-run viability of parks of this kind is doubtful.

Nevertheless, the introduction of the EuroDisney-Park was an enrichment for Europe’s recreation and spare-time industry, and once again, several other parks followed Disney’s example by erecting a theme park in Europe (for example: Warner Bros. – theme park in Bottrop, Germany).

These two parks can be considered as a possible way of how to export the culture of theme parks from the U.S. into Europe, because they are way smaller than the “normal-sized” parks in the U.S.. That makes them performing economically quite well in a huge market with strong competition in the recreation industry.

Developing Trends of the theme park industry

Theme parks are considered to evolve as a component of the international tourism industry. From an international view, they will not blindly follow the U.S. model, but evolve new forms of attractions where tourism is a more important source of market support.

The following trends seem to be reasonable and likely:

Themed to country/region

New parks will have stronger theming tied to the country or local region, especially in Europe. Theme parks are increasingly becoming a symbol and showcase for regional pride, culture, and technological achievement. The danger here is that by being too serious about "cultural" tourism the parks can be too educative and could leak to be fun (ERA 1998a, p14).

Part of larger mixed-use destination projects

In the urban/suburban context, it can be seen that theme parks and large-scale attractions are being designed into regional and specialty shopping complexes, mixed-use waterfront developments, and even some multi-use office buildings. In more rural settings, additional components often include destination resorts, bungalow parks, shopping/restaurant villages, and special event centers / trade expositions.

Greater visitor participation and interaction

New attractions are being designed to provide greater participant control and encourage interplay between the visitor and his environment. This is a natural outgrowth of both available technology and the demonstrated appeal of such involvement at places like the San Francisco Exploratorium. New thrill rides are being offered where the rider can individually control the experience and intensity of the ride (see next point). Future thematic concepts will be based more on participative activities (sports, music) that relate to the audience rather than comic book characterizations (ERA 1998a, p15).

Use of simulation experiences and virtual reality

Perhaps one of the most exciting areas of development is in the area of simulation achieved by the introduction of high-tech. Advances in technology have allowed attractions designers to realistically duplicate virtually any natural or special effects experience. By combining extremely high quality visual imagery with seats that are programmed to move with the action, visitors can realistically enjoy experiences that were previously unavailable in a theme park environment. The first highly popular example of this technology is the Star Tours attraction at Disneyland. Note that these simulations are produced for a fraction of the cost of traditional attractions. The technology is also more flexible (one can change the experience by simply changing the software (film) rather than creating a new attraction), and more land efficient (a 45-seat simulator needs only about 300 square meters). A major challenge, however, will be to have the technology breakthrough and still maintain the thrill and spontaneity of perceived personal risk and group interaction.

Greater water orientation

A greater use of water related activities, attractions and landscaping is occurring in theme park design. Several parks (Tokyo Disney Sea, Universal Studios in Port Aventura, Spain, Seapark, etc.) combine an active water park with more traditional themed rides and amusements. Performance parks such as Sea World are still popular but future expansion will be limited by restrictions on capturing and displaying aquatic mammals. We see a continuing acceptance of new, high technology aquariums using acrylic tunnel concepts, which combine a scuba diver's view of the undersea world with a ride experience.

Design for all-weather operation/artificial environments

New theme parks are designed to have more covered attractions as well as climate controlled walkways and rest areas. This allows for shorter amortization of high capital investment and fixed cost components. New theme parks are being designed with a higher degree of weather protection in order to enable a longer operating season and longer operating hours per day, which is an important topic in locations farther north than Florida (ERA 1998a, p15).

When one looks ahead at the larger number of tourists who are expected to travel to new destinations (particularly within the Asia - Pacific region), there will be increasing pressure on sensitive environmental and social resources at the destination. A new role for theme parks is emerging. By their nature, they are designed to handle large numbers of people within a controlled space and with manageable impacts.

In the future they will have the chance of providing a greater educational function to introduce, interpret, and sensitize the overseas tourist to the environment and to the host community and its values.



They can become a new gateway for host country tourism. Rather than being viewed as a stand-alone attraction, theme parks will become part of a balanced leisure product and tourism system that contributes to the economic development, employment, and resource preservation of an entire region (ERA 1998a, p15).

Focus on Turkey

All the above consideration are to be analyzed accordingly in the case of Turkey, considering the special geographic, social and political current situation.

Nowadays Turkey is crossing a country development process, not just from a technological point of view but also social and cultural, and the possible insertion of the country in E.U. is an important accelerator of this event. Moreover the more frequent immigration/ emigration creates a melange of cultural diversity that provides the input for an extrovert social, cultural and behavioral change.

Considering all this factors, it has to be evaluated if the Turkish economy and political organization is able to support the construction and management of a theme park without creating permanent damages in the regional economy or deep fracture in the social life of the citizens.

Ankara kingdom of the wild

In Ankara' situation is even more delicate, not just considering the emerging structure of a city that is still developing but also because of the sensible political situation toward the citizens national identity.

As describe in the previous chapter, the area chosen for the construction of the Park is not just important from an urban planning point of view, considering the crucial position it has in the future development of the city.

The AOÇ area has a patriotic connotation for Ankara's population, and not only, as it is a symbol of the new republic and a memory of the new ideals thought for the future. Is a modernization symbol that marks the passage from the old Ottoman Empire to the new born republic.

Atatürk Forest Farm and Zoo (Atatürk Orman Çiftliği) should have been an expansive recreational farming area which houses a zoo, several small agricultural farms, greenhouses, restaurants, a dairy farm and a brewery. A pleasant place to spend a day with family, be it for having picnics, hiking, biking or simply enjoying good food and nature. The "Çiftlik" (farm) as it is affectionately called by Ankarans, is image of famous products of the farm such as old-fashioned beer and ice cream, fresh dairy products and meat rolls/kebabs made on charcoal, at traditional restaurants, cafés and other establishments scattered around the farm.

Other than the National Symbol, the AOÇ is also one of the biggest green areas in Ankara, consisting one of the few forested recreational areas available nowadays in the capital. So it has an important ecological role as it hosts a big variety of flora and fauna to be protected. Moreover being one of the few green areas in the dry climate capital, is important for the air and sound quality of the city.

As last factor to be considered is the well-being of the citizens itself, that in preserving the area, preserve a part of their national but also personal history, a treasure to be handed down to the next generations.

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