GOVERNMENT OF KARNATAKA INITIATIVE

DEVELOPMENT OF LEGO THEME PARK

TOURISM PROJECTS FOR INVESTMENT OPPORTUNITIES

INVEST KARNATAKA 2016

January 2016
Table of contents

1. Introduction ........................................................................................................ 4
   1.1 Background ................................................................................................. 4
   1.2 Why Bangalore .......................................................................................... 5
   1.3 Integrated Theme Park ............................................................................. 5
   1.4 Difference between Amusement Park and Theme Park ......................... 6
   1.5 The Assignment ......................................................................................... 7
   1.6 Need for the Project .................................................................................. 7
   1.7 Approach & Methodology ......................................................................... 8

2. Amusement Parks Scenario ........................................................................... 10
   2.1 Evolution of Amusement Parks – Globally ............................................ 12
   2.2 Evolution of Amusement Parks – Indian scenario .................................. 13
   2.3 Amusement parks in India ...................................................................... 14
   2.4 Medium sized international amusement / theme parks ......................... 18

3. Factors Influencing Development of an Integrated Theme Park... 30
   3.1 Theme Parks - A Recreational Product .................................................. 30
   3.2 Locational Factors .................................................................................. 31
   3.3 Success Drivers ....................................................................................... 32

4. Integrated Theme Park in Bangalore .......................................................... 34
   4.1 Catchment Region .................................................................................. 34
   4.2 Overview of Bangalore City ..................................................................... 34
   4.3 Connectivity .............................................................................................. 37
   4.4 Demographic Profile ............................................................................. 38
   4.5 Socio-economic classification ................................................................ 39
   4.6 Economic Activities ............................................................................... 40
   4.7 Tourist Footfalls ..................................................................................... 42
   4.8 Physical Infrastructure ........................................................................... 43
   4.9 City Growth Trends ................................................................................ 49

5. Suggested Project Location ........................................................................... 51
   Road Infrastructure: ..................................................................................... 52
   Proposed Development: .............................................................................. 53
6. Project Concept ........................................................................................................55
   4.10 Tourism Policy ..................................................................................................55
   4.11 Project Component and Land Requirement .........................................................55
   4.12 Project Cost ......................................................................................................56

7. Way Forward ..........................................................................................................58
   5.1 Activities ............................................................................................................58
   5.2 Key Project Drivers ............................................................................................58
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

1. Introduction

Department of Tourism, Government of Karnataka, the agency responsible for promoting tourism in Karnataka has been at the forefront in attracting large number of tourists to the state. Being ranked as the fourth most popular destination for tourism among states of India, the number of tourists visiting Karnataka (both international and domestic) are increasing over the years.

The State has decided to bring tourist activities under the priority sector and has come out with a host of new plans including inviting private companies to establish resorts and privatizing the managements of government guest houses. The Government has been actively creating infrastructure in tourist places so that entrepreneurs could open resorts, hotels, amusement parks etc. One of the major attractions offered to entrepreneurs was to make available government land in all places barring in Bangalore City, at 50 per cent of the market value for opening resorts/hotels and for carrying out tourist related activities.

1.1 Background

Bangalore, the capital city and the largest city of the Karnataka State is popularly known as the ‘Silicon Valley of India’ and has come to be one of Asia’s fastest growing cities since emergence of the IT-ITeS industry. Karnataka itself is globally known for its vibrant economy and investment potential. This is evident from the number of MoUs signed during the Global investor Meet conducted in Bangalore in July 2010. The investor meet is an unprecedented initiative of the Government of Karnataka to position the state as a sustainable destination for investments, aiming at a holistic sector-wise growth across all sections. The meet was also organized in different parts of the world like the UK, USA, China, Germany, France, Singapore and Korea. Karnataka has now firmly positioned itself as “The Knowledge Hub of Asia” by signing about 361 MoU’s with State Government, from USA, UK, Canada, China, Japan and Saudi Arabia.

The Government intends to develop Bangalore as a tourist destination by setting up amusement / theme parks, promoting adventure sports and creating high-end accommodation through various public-private partnership (PPP) frameworks.

With this backdrop, the Government of Karnataka has decided to develop an integrated theme park in a suitable location near Bangalore on a PPP basis on the lines of international theme parks like Legoland, Sea World, Sentosal etc.
1.2 Why Bangalore

Located approximately 950 meters above sea level in South India on the Deccan Plateau, Bangalore enjoys a salubrious climate throughout the year. The city boasts of spacious gardens, parks, tree-lined avenues, profusion of flowering trees, lakes and parks, earning it the sobriquet of "Garden City." The once-sedate cantonment settlement of the British has now spread way beyond the mud fort and the four towers constructed by Kempegowda in 1537. With its booming economy and fast paced lifestyle, the capital of Karnataka has metamorphosed from a sleepy Garden City into one of India's fastest growing cosmopolitan cities. Bangalore is a city of contrasts, going by several other aliases: India's Silicon Valley, Pub City, Shopper's Paradise, Garden City, Air-conditioned City, Gourmet's Delight, Pub Hopper's Paradise and Shopper's Hot Spot.

The city not only plays host to several international information technology companies, public sector enterprises, defense organizations, and reputed educational and research institutions, but also lays claim to being the hub of India's emerging biotechnology industry. Bangalore has lots to offer - a rich cultural heritage, historic monuments, cultural centers, traditional arts and crafts stores, exotic cuisine, and friendly people.

Amusement parks, country clubs, resorts, golf courses, cyber cafes, pubs, discos, bowling alleys, billiard halls, pool parlours, bustling shopping malls, high-rise apartments and sophisticated hotels together form the new face of Bangalore. Infotainment, entertainment, science and technology parks and wildlife safari parks all merge into a vibrant, richly textured modern metropolis. Today, from a pensioner's paradise, it has transformed into one of the most sought after destination for young people chasing their dreams in IT, BPO, Biotechnology or knowledge management.

Surrounded by weekend getaways, Bangalore makes an ideal hub for visitors who want to travel to the many hill stations and coastal towns of South India. Bangalore is also well connected by road, rail and airways to all major metros and cities in the country.

1.3 Integrated Theme Park

Integrated theme parks are urban, family-oriented entertainment destinations. These centres combine shopping and recreation with entertainment to provide a complete leisure and fun experience for the family. The combination of retail and entertainment facilities helps to draw people in and support the overall operations of the theme park.
The goal of an integrated park for a city or developer is to create tax revenue, offer multiple cuisine options, improve revenue by sale of merchandise, etc, but for the visitor the overriding goal is to have fun. Entertainment is the main driver and a large part of what creates the unique experience of the theme park. However, the reason they are termed as integrated is because they also include restaurants and hotels for visitors who intend to spend longer durations at the park, MICE facilities, resort & spa, gaming facilities etc.

i. The components that, typically, form part of such integrated parks are as follows:
ii. Various theme based attractions
iii. Restaurants
iv. Retailing
v. Walk ways
vi. MICE facilities
vii. Resorts
viii. Spa
ix. Gaming facilities

1.4 Difference between Amusement Park and Theme Park

Amusement Park and Theme Park are terms for a group of rides and other entertainment attractions assembled for the purpose of entertaining large number of people.

Amusement Park

Amusement park is the generic term for a collection of rides and other entertainment attractions assembled for the purpose of entertaining a large group of people. An amusement park is more elaborate than a simple city park or playground, usually providing attractions meant to cater to adults, teenagers, and small children. An amusement park is a park that has rides, such as roller coasters, as well as other forms of entertainment.

Most amusement parks have a fixed location, as compared to traveling funfairs and carnivals.

Theme Park

A theme park is a type of amusement park which has been built around one or more themes. These theme parks will usually be divided into different sections that use
different elements to convey to visitors that they are in a specific place or time, or also to tell a unique story.

Non-theme amusement park rides will usually have little in terms of theming or additional design elements while in a theme park all the rides go with the theme of the park. Today, the terms amusement parks and theme parks are often used interchangeably.

1.5 The Assignment

GoK is keen to explore the possibility of setting up a medium sized integrated theme park on the lines of Lego land or other similar theme parks like Sea World, Sentosa, etc. in Bangalore, Karnataka (the “Project”).

This Project Report would provide details of the facilities that could be considered for development, the likely footfalls to the theme Park and the financial viability of the theme Park. The objective of this Report is to examine the amusement park industry – global as well as the Indian market, review of similar medium sized amusement/theme parks in the region and a profile of Bangalore city as the location for setting up the proposed Project.

1.6 Need for the Project

- Lack of entertainment parks in and around the city meeting the increased demand. The proposed theme park would provide wholesome entertainment activities for the entire family, catering to children, teenagers and adults.
- Need to boost up the Tourism Industry in Karnataka. The proposed park would also increase tourist footfalls in other tourist locations of the state, thereby giving a major boost to the entire tourism sector at large.
- Encourage livelihood opportunities for the local population in various ways.
- Due to the rising middle class & Increased Affordability, Increase in Tourist Footfalls is expected through developing this project. The catchment area for the proposed park would not be limited to only Karnataka or India but would attract tourists from the entire Asia region.
- Establishment of such a theme park in Bangalore would be a prestigious flagship project for the state which would place it on the global map, as a preferred destination in the region, for tourism and leisure activities.
1.7 Approach & Methodology

The overall framework for the assignment is explained in the chart below. The assignment would involve five key activities.

Assessment of the amusement park industry would involve the following tasks:

i. Overall trends, analysis, key drivers and market share analysis including key sub-sectors.

ii. Economic advantage, key infrastructure requirement, revenue spinner effect, etc.

iii. SWOT analysis for ‘leisure & entertainment’ sector
iv. Existing and proposed investments in the sector.

v. Review of case studies of similar entertainment parks established in India and abroad, to arrive at the activities, components, footfalls, prices points and other key success drivers for the Project.

**Profiling of target population & quantification** would involve the following tasks:

i. Identification of target population for the proposed Project.

ii. Definition of criteria for quantification of target population for mid-term (7-10 years) and long term (10 years and above).

iii. Profiling of target population according to an appropriate system (including SEC).

**Assessment of demand, infrastructure & support facilities** would involve the following tasks:

i. Identification of various normative standards for quantifying the demand.

ii. Demand estimation, scenario analysis and indicative pricing points.

iii. Infrastructure support required to realize the demand.

iv. Potential market share for the proposed Project.

**Financial viability assessment** would involve the following tasks:

i. Estimation of Project Cost, O&M expenses and likely revenues.

ii. Financial viability assessment under different scenarios.

**Preparation of Project Report** would involve the following tasks:

i. Co-ordination with the market Consultant for outputs of the market study.

ii. Discussions with large amusement / theme park owners / operators to obtain their inputs in determining the key drivers for the Project.
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

2. Amusement Parks Scenario

Amusement Park and Theme Park are terms for a group of rides and other entertainment attractions assembled for the purpose of entertaining large numbers of people. An amusement park is more elaborate than a simple city park or playground, usually providing attractions meant to cater to children, teenagers, and adults.

Amusement parks evolved in Europe from fairs and pleasure gardens which were created for people's recreation. The oldest amusement park in the world (opened 1583) is Bakken, at Klampenborg, north of Copenhagen, Denmark. In the United States, world's fairs and expositions were another influence on development of the amusement park industry.

Most amusement parks have a fixed location, as compared to traveling funfairs and carnivals. These temporary types of amusement parks are usually present for a few days or weeks per year, such as funfairs in the United Kingdom, and carnivals (temporarily set up in a vacant lot or parking lots) and fairs (temporarily operated in a fair ground) in the United States. The temporary nature of these fairs helps to convey the feeling that people are in a different place or time.

In common language, Theme Park is often used as a synonym for the term 'Amusement Park'. A 'Theme Park' is actually a distinct style of amusement park, for a theme park has landscaping, buildings, and attractions that are based on one or more specific or central themes. A plurality of themes is not required to be considered a 'Theme' park. Despite the long history of amusement
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

parks, where many parks have traditionally incorporated themes into the evolving design and operation of the park, qualifying a park as a theme park, the first park built with the original intension of promoting a specific (or exclusive set of) theme(s), Santa Claus Land (currently known as Holiday World & Splashin’ Safari) is located in Santa Claus, Indiana. Disneyland, located in Anaheim, California, built around the concept of encapsulating multiple theme parks into a single amusement park is often mistakenly noted as the first themed amusement park.

Like any other developing country, India has also undergone rapid urbanization resulting in higher population and high income levels in urban areas. Due to increase in income levels, the consumers have more disposable income, part of which they would like to spend on recreational and leisure activities. With more people traveling abroad and experiencing theme parks like Disneyland, a need for India’s own amusement park was felt in 1980’s. As a result of this, Appu Ghar, India’s first amusement park was set up in 1984 that tried to fulfill the latent demand for entertainment and theme parks.

With the success of Appu Ghar, more amusement parks started coming-up mainly in the outskirts of the city like Essel World in Mumbai, Fun ‘n Food in Delhi and Nicco Park in Kolkata. But today after around twenty-five years since its inception, the industry is still not at par with its global counterparts. The amusement parks in India still lack the driving force to attract visitors on a standalone basis. Also, in some growing cities, despite the willingness to pay for the entertainment destinations, no significant products have been introduced. Thus there is a tremendous scope for amusement and theme park industry in India.

Family Entertainment Center (FEC) is another developing concept in the entertainment industry which started coming up in India with the advent of Mall and Multiplex culture. Providing for wholesome indoor entertainment experience to kids and adults, FECs can be seen both as a standalone entity and as part of malls, multiplex and
amusement parks. They target indoor amusement like video games, simulators, miniature golf, bowling alley, pool/snooker, bumping cars, kids play stations etc.

2.1 Evolution of Amusement Parks – Globally

Global amusement park industry has had a long evolutionary history. Tracing its origin to pleasure gardens of medieval Europe which provided line entertainment using rides, games, music and fireworks, the industry got its modern form in US in the late 19th century. The formation of Disneyland in 1955 led to the start of the theme park era, which changed the landscape of global amusement park industry.

The global amusement parks can be categorized into destination resorts, regional parks and local parks, based on their target audience and products:

**Destination Resorts**

These include themed dry & wet rides and other attractions along with facilities for on-site accommodation. These parks act as resorts attracting both domestic and international tourists and command high ticket prices. Examples of such resorts include Disneyland Resort, Sentosa Resort and Genting Resort.

**Regional Parks**

These parks offer rides and attractions and on-site accommodation facilities on a smaller scale. The visitor catchment area of such parks is normally 300-400 km and the ticket prices are usually less than the destination resorts.

**Local Parks**

These parks offer rides and attractions but do not provide accommodation facilities. They mostly target providing entertainment for a day’s trip. In terms of footfalls, amusement and theme parks in North America record the highest visitors, followed by Asia-Pacific, Europe and Latin America. In 2008, the top 25 amusement parks in the world accounted for a total footfall of 186 million.

The amusement and theme parks across the world offer ancillary services including hospitality, restaurants, retail malls, souvenir shops, shopping outlets, live
entertainment like cinemas/concerts, sports like gym/golf course and conveniences like parking/ATMs etc.

2.2 Evolution of Amusement Parks – Indian scenario

Appu Ghar in New Delhi was the first amusement park to be set up in India in 1984. Since then, the industry has grown to more than 120 parks across the country (about 70% being amusement parks and the remaining being water parks).

The amusement park industry in India is dominated by parks operated by corporations. After Appu Ghar, opened by International Amusement Limited (IAL), several other players have entered the market. These include Essel World, Nicco Park, Veegaland by V-Guard Industries etc. Several more amusement parks have been opened by IAL also that include Adventure Island - the first integrated amusement park and Mall - and Worlds of Wonder.

The industry has also seen the emergence of amusement park equipment manufacturers and suppliers like Hindustan Amusement Machines, Arihant Amusement Manufacturers, Bombay Amusement Rides, Wonderla Rides etc.

Since the inception of India’s large amusement parks like Essel World, several theme parks have also opened. These include Kishkinta, Ramoji Film City and Ocean Park. The number of theme parks is still considerably low. There has also been development of integrated resorts with several ancillary facilities like hotels, retail outlets and convention centers along with the theme park rides. Some of these resorts include Worlds of Wonder in New Delhi, VGP Universal Kingdom in Chennai and Ramoji Film City in Hyderabad.

India has also witnessed growth in Family Entertainment Centers (FECs). This segment gained momentum in mid-2000s with the mall revolution. Today, FECs have become an integral part of the malls, multiplexes & amusement parks across the country. Average size of these FECs is around 2000 to 10000 sq ft which is lower as compared to global FECs. The leading operators of FECs in India remain few. These include Timezone, PVR Blue-O, Jammin Creations and Orama.

Amusement parks and theme parks in India can be categorized into three major groups namely, large parks, medium parks and small/local parks. This categorization is done on the basis of the park’s size and target segment. Examples of these include Essel World, Worlds of Wonder as large parks; GRS Fantasy Park in Mysore & Fun n Food Village in Delhi as medium park and Fun n Food Kingdom in Dehradun and Snow World in Hyderabad as small/local parks.
Of all the parks in India, only 15% classify as large parks, 30% as medium parks while the remaining 55% are classified as small parks. Amusement parks can also be classified on the basis of their concepts.

General trend in the industry shows that amusement parks in India target kids and youth from middle income segments with occasional promotional offers for the low income groups. The parks receive visitors mostly from local/primary market with few visitors from tertiary market as well. The parks get their revenue mainly from entry tickets and F&B with other, less contributing, sources being rentals and merchandizing.

The amusement park industry in India has grown significantly since its inception. However, the size, footfalls and revenues are still very low as compared to their global counterparts. The challenges in front of the Indian amusement park industry still remain: low per capita income, low consumer willingness to spend, inefficient infrastructure support, non availability of land and financing issues.

### 2.3 Amusement parks in India

There are a good number of examples of medium to large size parks which have been successful in India. Examples include Nicco Park in Kolkata, Worlds of Wonder in Noida, Essel World in Mumbai, Wonderla in Bangalore etc.

**Noida Entertainment City, NCR**

Noida Entertainment City is an integrated development spread over 147 acres, commenced in 2000. It has an amusement park called as Worlds of Wonder (WOW) which has an area of around 15-20 acres. Promoted by International Amusement
Limited and Unitech, WOW has 19 rides (all imported). The total amusement park capex was around Rs.200 Cr. It receives around 3.5 lakhs visitors annually. Apart from amusement park, the Noida Entertainment City also has a mall and planned hospitality space.

**Kishkintha, Chennai**

Kishkintha is the first theme amusement park located 28 km South of Chennai near Tambaram. It is spread over 110 acres, and offers exciting rides and attractions. Kishkinta is a household name and the favourite fun destination for all ages ranging from six to sixty. It is an ideal destination for family and group entertainment. The amusements, attractions, water games and rides, make Kishkinta India's leading water theme park.

**Wonderla, Bangalore**

Located in Bangalore, Wonderla is an amusement park spanning over 82 acres. The rides area is limited to about 20 acres. The park has 28 rides apart from other attractions including cinemagic simulation and musical fountain. The major attraction at Wonderla is the 30 m high Ferris wheel mounted on a 15-storey high building and a thrill ride Hurricane. The total capital cost of Wonderla is reported as Rs.105 Cr. Promoted by V Guard Industries, the amusement park receives around 7 lakhs visitors per year.

**Essel World, Mumbai**

Essel World commenced in 1986, with its associate park Water Kingdom added in 1998. The amusement park was promoted by Essel Group and was one of the first large scale amusement parks in India. Essel World has 29 rides with other attractions including ice skating, bowling, cricket zone and discotheque. The park is spread over 80 acres and receives around 18 lakhs visitors per year.
Veegaland, Kochi

Veegaland, started in 2000, was promoted by V-Guard Industries and is counted as one of the most ecofriendly amusement parks in India. The park is spread over 30 acres with 26 rides and other attractions like musical fountain, laser show and visual theatres. Veegaland receives around 6.5 lakhs visitors annually.

Athisayam Amusement Park, Madurai

Located in Madurai near the Vaigai River, the Athisayam Amusement park is a marvelous entertainment center for children, adults and old. The park showcases enough for all kinds of people including the different rides, which are wonderful. The Athisayam Park is famous for its cleanliness and safety.

MGM Dizzy World, Tamil Nadu

MGM Dizzy World is a 27-acre, children’s amusement park situated at Muttukkadu enroute to Mamallapuram. The major attractions here are the water chute, parachute tower, pirate boat and a 110 feet “dizee shake” challenger.

Dream World, Kerala

Dream World Water Theme Park is situated on the lap of enchanting Athirapilly waterfalls just 8 km from Chalakkudy. The park is designed in such a way that tourists belonging to any age group can effortlessly reach all the amusement rides without much walking or climbing. It has a total of 42 rides including 24 water rides.

Silverstorm, Kerala

This is considered to be India's most beautiful water theme park. It is located at Vettilappara near the famous Athirappilly waterfalls. There are many exciting rides and state of the art games in this park that lies amidst mighty hills and peaceful valleys. The place has been designed and landscaped magnificently. The very route to the park is like a mini adventure. One has to drive through the Western Ghats, the massive mountain ranges of Kerala.

Swabhumi - The Heritage Park, Calcutta, West Bengal
The Swabhumi Park is a theme park, which offers something for everyone. As the name suggests the park revolves around Indian culture and heritage. The basic theme of the park Swabhumi (My Land) has been conceived to revolve around 'heritage'. The main offering of the Park would essentially be an educative and participative experience for the visitors, by showcasing and demonstrating art, crafts heritage and culture from various regions in the country, with a focus on Bengal.

**Ocean Park, Hyderabad**

Ocean Park is a Water Theme Amusement Park modeled on International standards. The amusement park is situated at Gandipet just 15 kms from Hyderabad, offers a spectacular mix of internationally popular Water Rides and Amusement Rides for all age groups and provides full day entertainment to all its patrons. Spread over a sprawling 20 acres of lush landscaped garden, it offers a number of internationally acclaimed rides.

**Ramoji Film City, Hyderabad**

Ramoji Film City is the world’s largest integrated film studio complex at over 1,600 acres of land. It is also a popular tourism and recreation centre, containing both natural and artificial attractions including an amusement park. It is situated near Hayathnagar and Peddamberpet on Hyderabad - Vijayawada, NH9 highway, about 25 km South-East of Hyderabad.

Ramoji Film City offers pre-production, production, and post-production resources and over 500 set locations. There are many gardens, authentic sets, about 50 studio floors, a digital film facility, the support systems, outdoor locations, high-tech laboratories, etc. The Film City's infrastructure includes custom-designed locations & mock-ups, set construction, properties & costumes, shooting stages, cameras and equipment, audio post-production, digital-post-production/SFX as well as film processing.
Twenty international films and forty Indian films can be produced simultaneously in the complex. It has attracted not only filmmakers from the country, but also producers from around the world.

Every year, the studios attract over a million tourists, and the complex creates revenues in billions of rupees. Located at the entrance of the film city are the 3-star hotel, Tara and a 5-star hotel, Sitara for the film production units as well as for tourists. Once inside, there is Hawa Mahal, an intricate miniature Golconda Fort, which is on a hilltop from which one can have a Bird's-eye view of the whole studio.

The Film City also provides banquet halls for corporate retreats and conventions.

Some of the places for tourists to visit include a Japanese garden, the ETV planet (a multi-purpose editing suit), a large pool, artificial waterfalls, intricately carved caves, an airport terminal, hospital set, railway station, churches, mosques and temples, shopping plazas, palace interiors, chateaus, rural complexes, urban dwellings, a winding highway, and model US and European sets. Shops include Parade, a prop-shop, where costumes of actors can be ordered and Shangrila, a nursery that sells exotic plants. This Film City has also 'Ramoji Film Magic' which shows about the behind-the-scene activities involved in movie making.

The vintage Film City coaches shuttle visitors around the studios on a guided tour. There are several settings in the studios which lead the visitors from streets of the Mauryan Empire or the Mughal Empire or even the American Old West. There's also the famous Hollywood sign displayed on the hills at the studios.

2.4 Medium sized international amusement / theme parks

Medium sized international theme parks such as Legoland, Sea World, Sentosa, etc have been studied and brief descriptions of the parks are presented below.
Legoland Theme Parks

Plastic Lego building blocks have been a favorite children's toy since 1932, and the various Legoland parks around the world make these small blocks into gigantic attractions. While Legoland theme parks are present in Denmark and the United Kingdom, the Legoland in California is the most famous and the most popular. The California park opened in 1999, and its 128 acres have delighted millions of children ever since.

Legoland theme park is a great family getaway with a focus on young children, but these classic building blocks will make this destination a favorite for anyone young at heart.

When using these plastic building blocks, there is no limit to the fantasy creations children can imagine. At the same time, the model builders at this unique theme park have no limits when creating fun and exciting attractions based on these popular toys.

Because Legoland is geared toward children between the ages of 2 and 12, there are no extreme thrill rides, but the simple rides and other interactive features of this park are a thrill for every young guest. Popular activity exhibits include:

**Royal Joust:** Kids can ride their very own life-size Lego horse through an enchanted forest on this gentle ride.

**Water Works:** This fun play area has spouting fountains and other splashy gadgets set to music.

**Safari Trek:** This African-themed ride takes guests up close and personal with realistic Lego models of giraffes, crocodiles, gorillas, and other animals.

**Fun Town Fire Academy:** The whole family can get into the fun with this interactive fire fighting ride.

**Coastersaurus:** This family coaster dips and curves around life-size Lego brick dinosaurs at speeds up to 21 miles per hour.
Kid Power Towers: Riders get a great view of Legoland theme park from the top of this colorful free fall ride.

The Dragon: This gentle family coaster gives riders a behind-the-scenes look at the park's iconic Enchanted Castle.

Dig Those Dinos: This play area is thirty cubic yards of sand where children can practice their paleontology skills by unearthing bones and teeth.

Lego Technic Coaster: This wild mouse style coaster offers quick turns and sharp dips to thrill riders of all ages.

Models

A Lego-themed park wouldn't be complete without detailed Lego models, and Legoland features dozens of carefully sculpted designs. From the creatures that populate different rides to the decorative accents throughout the park, Lego models are everywhere, but the most spectacular are found in Miniland U.S.A. More than 20 million bricks make up this 1/20 scale area that replicates some of the country's most famous regions, including downtown San Francisco, Florida's Cape Canaveral spaceport, New York City, New Orleans, and the bright Las Vegas Strip.

Guests interested in seeing how Legos come together for these amazing designs will enjoy visiting the Model Shop where the professional model designers create new sculptures for the park. Taking the Lego Factory Tour is another great way to learn about Legos by seeing the manufacturing process up close.

Water Fun at Legoland

Legoland has several "wet" attractions including the Pirate Shores water park and the Splash Battle ride. Riders aim water cannons at riders in other ships as well as shore-based pirates and can even be hit by landlubbers!

Shows

Legoland theme park also offers fun entertainment for children to enjoy. Acts specializing in magic, music, and ventriloquism are all regular features. To cater to children's short attention spans and to leave plenty of time to experience other fun
and games at Legoland, the longest shows are only 20 minutes long. Special holiday events are also arranged throughout the year.

**Shopping**

Guests can take Legoland home with them to build their own models by visiting the park's popular stores. While there are several stores themed to the park's rides, the Big Shop is a purely Lego boutique. With 8,000 square feet of space, the Big Shop has the largest collection of Lego kits and merchandise in the world. Guests who only need a few pieces, however, may prefer the Lego Club House, where different bricks can be bought in bulk.

**Dining**

Guests can refresh their energy for further construction adventures by trying a treat at one of Legoland's snack kiosks or restaurants. Favorite treats include sandwiches, wood-fired pizza, hot dogs, burgers, ice cream, popcorn, espresso, salads, and delicious apple fries with a creamy vanilla dipping sauce.

**Tickets**

General admission park tickets (2009 prices - subject to change) are $63 for adults and $53 for children and senior citizens. Two day passes are available for guests who can't get enough Lego fun and are priced at $78 for adults and $66 for children and senior citizens. Shopping passes are available for anyone who just wants to finish off their Lego collection - if the shopper returns to the gate within an hour, there is no charge, and if they spend more than $20, their parking fee will be refunded.

Many discount tickets for Legoland are available as well - the park is great for birthday parties and groups can buy less expensive tickets. Discounts are also available for AAA members, airline employees, and military personnel.

**SeaWorld Parks**

SeaWorld Parks & Entertainment (abbreviated SeaWorld) is a family entertainment company owned by The Blackstone Group. SeaWorld is responsible for the operation and maintenance of ten theme parks located throughout the United States. SeaWorld Parks is headquartered in Orlando, Florida.
In 2009, SeaWorld's properties hosted a combined total of approximately 23.5 million guests, making it the fifth-largest amusement park operator in the world.

SeaWorld Orlando is a theme park, and marine-life based zoological park, near Orlando, Florida. It is owned and operated by SeaWorld Parks & Entertainment, a subsidiary of The Blackstone Group. When combined with its neighbor Discovery Cove and the Aquatica waterpark, it forms a larger entertainment complex devoted to Earth’s oceans and the array of life that inhabits them.

In 2009, SeaWorld Orlando hosted an estimated 5.8 million guests, ranking it the seventh-most visited amusement park in the United States.

Unlike most other theme parks, SeaWorld Orlando is not divided into lands or sections. There are, however, some distinct areas within the park.

Key West at SeaWorld- Key West at SeaWorld is designed to mimic the appearance of the city of Key West, Florida. Exhibits in this portion of the park include stingrays, dolphins, sea turtles, flamingos, manatees, and alligators. The stingray and dolphin habitats offer opportunities for guests to feed the animals.

Shamu's Happy Harbor- Shamu's Happy Harbor is a children's play area hosted by Shamu, the park's killer whale mascot, that features six family rides (including the junior coaster Shamu Express), a net climb structure, and a water play area.

The Waterfront at SeaWorld- The Waterfront, the newest section of the park, resembles a seaside mediterranean village and contains shops and restaurants, as well as the park's iconic Sky Tower ride.

SeaWorld Orlando has a vast array of attractions, including rides and animal exhibits. Two of these attractions actually combine the two, with both a ride component and a separate animal exhibit.
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

Rides

- Manta, a flying roller coaster
- Kraken, a floorless roller coaster.
- Journey to Atlantis, a boat ride with roller coaster elements themed to the mythical Atlantis.
- Shamu Express, a junior roller coaster with cars themed as Shamu.
- Sea Carousel, a carousel themed with caricatured marine mammals and fish.
- Jazzy Jellies, a tea cup style ride that lifts up and spins controlled by riders with a disk
- Swishy Fishies, a teacups ride themed as fish.
- Ocean Commotion, a rockin’ tug ride.
- The Flying Fiddlera kiddie crab themed freefall attraction
- Net Climb, a four story net climb with tire swings and slides.

Animal exhibits

- Penguin Encounter, an indoor exhibit that also includes puffins and murres.
- Shark Encounter, which features an underwater tunnel and a wide array of sharks, rays and venomous fish. At Sharks Underwater Grill, guests can dine while observing the sea life in the main exhibit tank.
- Pacific Point Preserve, home to the park’s sea lions and seals.
- Dolphin Cove, an outdoor exhibit where you can feed and touch Bottlenose Dolphins.
- Turtle Point, an outdoor exhibit that features rescued sea turtles in a shallow pool with a beach.
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

- Manatee Rescue, home to rescued Florida manatees and also show cases alligators.
- Stingray Lagoon, a covered exhibit where you can touch stingrays.
- Dolphin Nursery, a covered exhibit where new-born Bottlenose Dolphins reside.
- Flamingo Pond, an outdoor exhibit where flamingos are exhibited.

Combined attractions

- Manta, a flying roller coaster and aquarium exhibit featuring rays, sea dragons and other species.
- Wild Arctic, an indoor exhibit featuring polar bears, beluga whales, and walruses that is designed to resemble a research station in the Arctic Ocean. Guests can take a motion-simulated helicopter journey to the exhibit, or may bypass the ride and watch the film without the motion and proceed directly to the exhibit. During the Christmas season, Wild Arctic is replaced by the Polar Express Experience, a temporary overlay based on the popular 2004 feature film.

Live entertainment

SeaWorld Orlando hosts a number of live shows, many featuring trained animals. During peak seasons (such as summer), the park will offer special shows in addition to the main performances.

- Shamu Stadium is the seven-million gallon home to the park's killer whale performers. The park's current production is Believe, which is joined by Shamu Rocks during busier seasons and Shamu Christmas Miracles during the holiday season. In 2011, Believe will be replaced with another killer whale show.
- The Whale and Dolphin Stadium features dolphins, false killer whales, macaws and even an Andean condor in Blue Horizons, which also adds human acrobats and divers.
- The Sea Lion and Otter Stadium hosts "Clyde and Seamore," a pair of California sea lions in the comical presentation Clyde and Seamore Take Pirate Island. During the summer months, the pair lampoon the park's other shows during Sea Lions Tonight.
Bayside Stadium formerly hosted water skiing shows on the park's central lagoon. Today, the stage is used for SeaWorld's numerous music concert series and other special events.

The Nautilus Theatre is home to A'lure, an acrobatic show similar in style and presentation to the works of Cirque du Soleil.

Seaport Theatre features dogs, cats, and other animals that have been rescued from local animal shelters in Pets Ahoy!. This venue is also home to Elmo & Abby's Treasure Hunt.

Seafire Inn is both a restaurant and a theatre in the style of a dinner theatre. This venue is home to the Makahiki Luau, a Polynesian festival offering authentic cuisine, fire dances, and island chants and songs. In the summer, this venue also hosts Wild Things at Seafire, an educational display of several various exotic animals being handled by an animal trainer.

During peak seasons, SeaWorld offers a nightly fireworks presentation. The newest production is Reflections, a multimedia show featuring fireworks, dancing fountains and mist screens that is inspired by the musical soundtracks of the park's shows and attractions.

Animal Inventory

The following is a current list of animals at the SeaWorld Orlando park, as based on an October 2008 Marine Mammal Inventory Report received from the National Marine Fisheries Service (NMFS), a United States federal agency:

- Beluga Whales
- Wild Arctic
- Atlantic & Indo-Pacific Bottlenose Dolphins
- False Killer Whales
- Killer Whales
- Pacific Walruses
- Polar Bears

Ocean Park, Hong Kong

Ocean Park Hong Kong, commonly known as Ocean Park, is a marine mammal park, oceanarium, and animal theme park, situated in Wong Chuk Hang and Nam Long Shan in the Southern District of Hong Kong. Founded in 1977 by the then Governor of Hong Kong Sir Murray
MacLehose, Ocean Park has now grown to about 35 attractions and rides. The park has won several awards, including The World's Seventh Most Popular Amusement Park and 33rd Most Visited Tourist Attractions in the World by Forbes.

In 2009, Ocean Park received 4.8 million visitors awarding it the position of the world's number 14 theme park by annual attendance, ahead of rival Hong Kong Disneyland's 4.6 million visitors. Covering an area of 8,70,000 sq. m (~215 acres) of land, the park is separated by a large mountain into two areas, The Summit (Headland) and The Waterfront (Lowland) respectively. The areas can be reached by a 1.5 km long cable car system, a shuttle bus, or the Ocean Express funicular railway. As the Headland comprises several hills, visitors can also opt to take the world's second longest outdoor escalator.

The theme park currently has 19 rides, including two rollercoasters, but also houses 11 animal exhibits, such as a Giant panda habitat, a jelly fish and Chinese sturgeon aquarium, as well as a four-story aquarium displaying more than 2,000 fish.

Besides being an amusement park, Ocean Park Hong Kong also operates observatories, well developed laboratories, an education department and a Whales and Dolphins Fund.

Ocean Park Hong Kong was the first institution in the world to have success in artificial insemination of bottlenose dolphins, and developed numerous new breeds of goldfish.

In September 2007, Ocean Park Hong Kong increased its ticket prices by 12% and 14% to take advantage of the Golden Week Holidays.

In July 2009, Ocean Park Hong Kong announced that they would increase their ticket prices by 20% and 25% to pay a loan.
KidZania- Mexico, Jakarta, Dubai

KidZania is a Mexican chain of family entertainment centers currently operating in 15 locations.

KidZania is a unique EDUTAINMENT (Entertainment with Learning-Education) CENTER for children between 2 to 16 years old and their parents. It is a kid-sized replica of a real city, with streets, buildings, retail and different vehicles going around the city. Children play adult roles and they learn how to be a doctor, a pilot, a construction worker, a private detective, an archeologist, an F1 driver and over 100 other professions and occupations.

There is a replica of the most representative buildings in a city such as hospital, supermarket, beauty salon, theatre, industrial sites, and many more. KidZania is a safe, interactive and highly educational center where kids wear the uniform and perform the role they are playing. Led by Zupervisor (Trainer-Guide), they learn the complexities of the adult world, and learn the value of money, just as in real life.

In KidZania, kids use Kidzos (official currency of KidZania). Children learn to appreciate the value of money, by performing over 100 professions and occupations and earn a salary. Their salaries earned, can then be used to buy goods and services available in KidZania. Kidzania has its own economy, ‘Kidzo’ is the legal currency here.

Each time one visits Kidzania, one will receive a 50 kidzos check. Once inside, one must go to the bank, cash your check and use their money to buy goods and services such as: rent car, get a hair-do at the beauty salon, or shop at KidZania department store, for instance.

Kidzos are not for sale with real money, if one spends all their Kidzos or wants to
earn more, one must get a job and work to provide a product or service such as firefighter, dentist, hairdresser, or construction worker, or choose among many different professions.

At every pavilions or activity one may spend or earn Kidzos. For example: at the Fire Station one can earn money, while at the KidZania department store one can spend them. However, there are lots of establishments where one can do both of things, at the Hospital, for instance, one can be a doctor and earn money or be a patient and pay to get medical attention.

Consumer goods and product prices are different depending of the pavilion or the activity and they can change depending on the popularity of the activity compared with others. If one wants to save Kidzos and manage your credit balance, one can open a savings account at the bank.

KidZania was created and developed by Mexican entrepreneur Xavier López Ancona, current KidZania CEO. The first KidZania opened in September 1999 in Santa Fe Shopping Mall in Mexico City, and was named La Ciudad de los Niños ("The City of the Children"). The first full year of operations saw 800,000 visitors, and has ever since averaged a similar number for each year, hitting its lowest at 750,000 and its highest at about 840,000.

In 2005, expansion plans allowed the opening of KidZania Monterrey, in the northern city of Monterrey, in Mexico.

After this opening, KidZania engaged veteran entertainment dealmaker Andrew Darrow to lead an intensive campaign identify the world's most qualified franchisees, and contract with them to open franchised centers around the world.

The third KidZania and first franchised center opened in October 2006, and is located in Lalaport Toyosu, Tokyo, Japan. The first year of operations had 905,000 visitors, and has been keeping steady. The fourth KidZania opened in November 2007 in the sixth floor of Pacific Place Jakarta, a new shopping mall in Jakarta, Indonesia. This is the first
of its kind to open in Southeast Asia. There are nine sections in Jakarta based Kidzania—residential services, cultural, suburb, industrial, media, restaurant, retail and transportation. More than 50 activities such as fire station, police station, jail, tax service office, hospital, bank, farmacy, radio station, TV studio, public transport, airport etc. are carried out under these sections. All facilities like food court, souvenir, photo, parents lounge, birth day party room, school group, private events, emergency room, information point, package storage, lost and found, missing parent and children, rest rooms, ATM are part of Kidzania.

Kidzania parks are active in Korea, Indonesia, USA, Mexico, Japan, Portugal and Chilly. One more Kidzania is coming up in Dubai.

A concept based on KidZania is being developed in Ahmedabad, Gujarat as part of a ‘Kids City’. In first phase of the proposed city will have 10 children activities such as fire station, police station, bank, hospital, tax collection, public transportation and sports. Children-size structures will be built for these activities. Only children will run these activities in the proposed Kids City.
3. Factors Influencing Development of an Integrated Theme Park

This chapter discusses theme parks as a recreational product and outlines the key factors that would influence the development of the proposed park.

3.1 Theme Parks- A Recreational Product

The elements of a theme park constitute three levels: the core product, that is, what the customer is really buying, the tangible product, the entity which customers can purchase to satisfy their needs, and the augmented product, the total product bundle that should address all the customer’s problems and needs.

At the core / nucleus of the product is the excitement and/or atmosphere it arouses in its visitors. The tangible product is made up of the contents of the park (rides, safety, range of rides and on-site attractions, brand name, quality of services, sharing the park with other people). Finally the augmented product offers other less important but
necessary services such as ancillary services (food courts, retail shopping, etc), parking facilities, services for visitors with special needs, etc.

Bearing in mind the nature of theme parks as a recreational product, the following factors are crucial for the success of the theme park:

- A precise definition of the theme
- A wise choice of location
- Definition of the target demand
- Appropriate size
- Appropriate market strategy
- A high degree of quality of service
- Appropriate animation of the themes, places and visitors
- Integrated development strategy

3.2 Locational Factors

From the developer’s perspective, it is important for them to have a clear idea of four points concerning the market to which the product is offered:

- Target market for the park – Markets can be distinguished as follows:
  - Resident Market: The total number of inhabitants residing in the park’s sphere of influence. This is normally the main target market of any park.
  - Tourist market at origin: This is the total number of potential visitors who from their place of residence, may feel attracted to visit the park, staying over at least one night. This is an ad-hoc market for each park and would depend on the park’s orientation, theme characteristics and penetration capacity.
  - Tourist market at destination – These are tourists that stay overnight in the vicinity of the park and who can therefore visit it.

- Footfalls to the park: How many are going to visit the park.

- Sphere of influence of the park - the area within which a trip to the park can be made without needing to stay overnight

- When the park would be opened for visitors

- Land: theme parks need large areas of land to develop. While selecting the land for the park, it must be remembered that the land so identified should be amenable for future expansion.

- Locational aspects: accessibility, the area’s geographical characteristics, including the availability of water resources, the place’s environmental quality, existence of
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

risk areas, existence of critical mass of recreational attraction in its immediate surroundings and the park’s own general purpose.

- **Access** – It is essential for the park to be served by an adequate access system. Transport networks are an important factor in determining the number of visitors the park is likely to attract. In this regard, it is important to consider both medium and long distance access networks and the existence of a transport system in keeping with the needs of the demand.

### 3.3 Success Drivers

From the examples of existing /theme/ water parks in India, the key success drivers for amusement parks are analyzed and presented below.

**Integrated Development** – It has been proven by global amusement parks and can be inferred from existing Indian amusement parks that standalone amusement/theme parks seldom make enough money. The huge capital investment required in the park is hard to bring to break-even in less than 15 years. Integrated developments where amusement parks are integrated with ancillary products like hospitality, commercial & retail units and F&B are the new form of theme parks being seen today. Examples include international parks like Disneyland and Genting Resorts, Malaysia and Indian examples like Noida Entertainment City in NCR and Ramoji Film City in Hyderabad.

**Accessibility** – There are many examples of amusement/water parks which have suffered because of their inaccessibility or location issues. Many amusement parks today are located outside cities because of high land costs or unavailability of land within city limits. In turn, they either depend on public transport or provide their own pick-up & drop services for movement of visitors. Unless the amusement park offers something very attractive, the footfalls are bound to get affected due to the remote locations. In most cases, the parks are reduced to being only a weekend get-away for the local crowd.

**Unique Selling Product & Innovation** – Product quality and amusement park success go hand in hand. The success can be simply stated as the capability of the park to attract the visitors. This in turn can be ensured by introducing uniqueness in the products offered by the amusement park which the visitor can’t get at any other place. Another option can be innovativeness in the concept as has been done by Ramoji Film City in Hyderabad and Kishkintha Park in Chennai.

**Maintenance & Up-gradation** – This is something which affects the probability of getting repeat visitors to a great extent. Regular maintenance of amusement park is
required to ensure safety while up-gradation with introduction of new rides or other attractions is necessary to ensure that visitors don’t get bored of the old offerings.

**Something for all** – In order to ensure sustained footfalls to the park, it is necessary to introduce attractions for all age-groups across the society. Unless the theme of the amusement park restrains the same, it is helpful to include kids, families, adults and senior citizens in the target consumers because this not only adds to the individual attendance at the park, but also brings group and repeat visitors. In addition, it should be tried that all income segments are targeted by introducing discounts/pay-per-use for attractions.

**Attractive packages** – It is important to understand the target consumers when defining packages. For instance, Bangalore has a strong presence of IT & ITeS companies thriving in and around the city which makes sense to offer group discount packages for corporate companies. Similar packages for school/college children can be introduced to increase the footfall.
4. Integrated Theme Park in Bangalore

This Chapter outlines the catchment region for the Project and discusses in detail the profile and suitability of Bangalore as the ideal location for the proposed lego theme park.

4.1 Catchment Region

The vision of DoT to introduce a large integrated theme park in Bangalore is to provide a one-of-its-kind entertainment and recreation destination not only for the people of Bangalore and Karnataka but also for tourists from other parts of the country and the Asia-Pacific region.

4.2 Overview of Bangalore City

Given the target population for the integrated theme park, a brief study of Bangalore city has been carried out to assess its preparedness to host a large project such as this.

Bangalore, the capital city and the largest city of the Karnataka State is popularly known as the ‘Silicon Valley of India’ and has come to be one of Asia’s fastest growing cities since emergence of the IT-ITeS industry. Karnataka itself is globally known for its vibrant economy and investment potential. This is evident from the number of MoUs signed during the Global investor Meet conducted in Bangalore in July 2010. The investor meet is an unprecedented initiative of the Government of Karnataka to position the state as a sustainable destination for investments, aiming at a holistic sector-wise growth across all sections. The meet was also organized in different parts of the world like the UK, USA, China, Germany, France, Singapore and Korea. Karnataka has now firmly positioned itself as “The Knowledge Hub of Asia” by signing about 361 MoU’s with State Government, from USA, UK, Canada, China, Japan and Saudi Arabia.

The “State Industrial Department” has the larger contribution in terms of development and implementation of the Projects. The State attracted over Rs.3.5 lakh crores of investments, wherein Bangalore alone has an investment plan of about Rs.10,117 crores, which is about 6.34 percent of the total investment. These projects are expected to generate 69,926 job opportunities in Bangalore, wherein IT&ITeS, Aero and Hospitality sectors play an important role. The major players in the above said sectors are Wipro Limited, Infosys Technologies Limited, Hindustan Aeronautics Limited (HAL), BEML Limited, Dynamatic Technologies Limited, Trishul Developers, City View Bangalore Properties Private Limited and Narayana Hrudayalaya Pvt. Ltd. Bangalore was earlier known as a ‘Pensioners’ Paradise’, and ‘Garden City’ for its...
delicate blossoms and greenery that imparts a unique beauty to it. The growth of Information Technology sector in the city, which is the largest contributor to India’s software exports, has led to Bangalore being recognized as the ‘Silicon Valley of India’ and this sector has the highest number of young workforce.

Bangalore is regarded as a high-tech city with offices or development centers of a number of mega software companies having wholly owned subsidiaries or joint ventures including IBM, Hewlett-Packard, Texas Instruments, Oracle, Novell, Fujitsu, and Digital Equipment. Bangalore is also headquarters to a large number of Indian software companies. Bangalore produces more than 35 percent of all software that India currently exports. In a short time, Bangalore has experienced rapid growth and international recognition in the field of software development. This has resulted in placing the city at a promising position in the international market for software. Bangalore is home to over 688 multinational companies, out of which 87 are from the Global Fortune 500 companies. Sustained efforts of both the Government of India and the Government of Karnataka in the last five decades have resulted in Bangalore becoming a major industrial and commercial hub in Asia.

With over 103 Federal and State research and development institutions including the Indian Institute of Science (ranked as the 18th globally), National Law School of India, 69 Engineering Colleges, world class health care facilities/medical colleges and institutions, and a host of other institutional infrastructure, Bangalore is a much sought after destination for trade, commerce and industry. Bangalore is even gaining the status of the ‘Floriculture Capital’ due to the present boost of the flower export from the city. Due to the rich stone resources Bangalore is also known as the ‘Stone City’, especially for its granite deposits. The salient features of Bangalore City are presented in the table below.

<table>
<thead>
<tr>
<th>City</th>
<th>Bangalore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (2001 Census)</td>
<td>5.68 Million</td>
</tr>
<tr>
<td>Estimated Population (2010)</td>
<td>7.79 Million (Projected)¹</td>
</tr>
<tr>
<td>Area</td>
<td>Municipal Area (BBMP): 741 sq. km</td>
</tr>
<tr>
<td></td>
<td>Planning Area (Bangalore Development Authority): 1,307 sq. km</td>
</tr>
<tr>
<td></td>
<td>Development Area (Bangalore Metropolitan Regional Development Authority): 2,190 sq. km</td>
</tr>
</tbody>
</table>

¹ As per Revised Master Plan-2015, Bangalore
### Development of Lego Theme Park, Bangalore, Karnataka

#### GOVERNMENT OF KARNATAKA INITIATIVE

| Geographic Location          | ▪ 77° 37’ E Longitude and 12° 8’ N Latitude.  
|                             | ▪ Elevation: 920 m above the mean sea level. |
| Connectivity and Linkages    | ▪ **Air:** The city has an international airport with regular flights from & to important destinations both in India and abroad. Bangalore International Airport started its operations of Phase 1 in April 2008  
|                             | ▪ **Road:** The city is strategically located on NH-4 (Chennai-Bangalore-Pune), NH-7 (Bangalore-Hyderabad), NH-48 (Mangalore), NH 207 (Chikaballapur), & NH-209 (Coimbatore) and State Highways to other cities in the State.  
|                             | ▪ **Rail:** The city has three railway stations, viz. Central, Cantonment and Yeshwantpur. The city is well connected to all major Indian cities by rail network. |
| Climate                     | ▪ Tropical Savanna climate  
|                             | ▪ March to May (warmest months)  
|                             | ▪ December to February (coldest months)  
|                             | ▪ July to September (rainy - southwest monsoon)  
|                             | ▪ November to December (rainy - northeast monsoon) |
| Temperature                 | ▪ Highest maximum temperature of 33 degree C  
|                             | ▪ Lowest minimum temperature of 14 degree C |
| Languages                   | ▪ Regional language: Kannada  
|                             | ▪ English, Hindi, Telugu and Tamil are widely spoken and understood. |
| City Administrator          | Greater Bangalore Municipal Corporation (Brihat Bangalore Mahanagar Palike) |
| City Functions              | Administrative Capital, IT capital of the country |
| Distance of International Airport from CBD | 35.0 km |
| Key Advantages of Bangalore | ▪ Availability of world class skilled manpower  
|                             | ▪ Location advantage - good connectivity and linkages  
|                             | ▪ Salubrious climate  
|                             | ▪ Reform oriented governance  
|                             | ▪ Cosmopolitan culture  
|                             | ▪ Excellent social, education & health facilities  
|                             | ▪ Telecom connectivity  
|                             | ▪ Presence of multinational companies  
|                             | ▪ Fastest growing city in Asia and availability of ‘Grade A’ properties |
4.3 Connectivity

Regionally Bangalore is bound by Kolar District on the northeast, Tumkur District on northwest, Mandya District on the southwest and state of Tamil Nadu on the southeast. The map showing the regional setting of Bangalore city is provided below:

Bangalore is very well connected to the other regional areas as indicated in map above. The city has access to other parts of state and neighbouring states and few countries by roadways, railways and airways.

Road: Bangalore has 2 Major National Highways that connect the city to other metro cities like Mumbai, Chennai (NH-4) and Hyderabad (NH-7). The state highways connect the city to other cities in Karnataka like Mysore, Mangalore, Tumkur, etc. The Bangalore Metropolitan Transport Corporation (BMTC) handles all the buses plying within the city, and the Karnataka State Road Transport Corporation (KSRTC) operates the buses within the state as well as outside the state. The KSRTC and private companies operate bus services to all major cities in South India, and even to Mumbai and Pune.

Railways: There are three major railway stations in Bangalore, viz. City Railway Station, and Cantonment Railway Station, and Yeshwanthpur Railway Station. The main station, i.e. City Railway Station is well connected to all major Indian cities. There are number of daily express trains to and from Bangalore thus making the city accessible from every metropolitan city in the country and also from other major cities.

Airways: Bangalore International Airport (BIA) at Devanahalli started its phase-I operation in April 2008. It is located at a distance of about 35 km from the Central Business District (CBD). In 2009 BIA has handled 8.7 million passengers (national and international business travellers) and over 120,000 aircraft movements. The airport is expected to handle about 10 million passengers per annum by 2011. There are 11 domestic airlines (including two freighters) to important cities like Kolkata, Mumbai,
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

Delhi, Hyderabad, Chennai, Ahmedabad, Goa, Cochin, Mangalore, Pune and Thiruvananthapuram. Bangalore also has 20 international airlines to Muscat, Dubai, Sharjah, New York, London, Mauritius, Singapore etc.

4.4 Demographic Profile

Population Growth: Bangalore has been witnessing industrialization way back from early 20th century when the princely state of Mysore took pioneering steps to promote industry in the state. During the post independence period, Bangalore attracted massive investments from the Government of India (GoI) for building large-scale knowledge-based public sector research and production facilities as well as the nation’s most sensitive and advanced military and space research facilities.

Later, during 1980s, due to soaring real estate prices and overcrowding in Mumbai, there was an influx of Mumbai industrialists, who relocated high-tech aspects of their businesses to Bangalore. During the 1990s, Bangalore developed into a preferred location for high technology industries such as electronics, IT, telecommunications and emerged as a globally integrated center of high technology research and production. This has resulted in sudden population explosion of Bangalore Urban Agglomeration with decadal growth touching a figure of 38 percent with a population of 5.68 million as per Census 2001. In the year 2007, during the preparation of Revised Master Plan-2015, Bangalore, the entire Bangalore Urban Agglomeration area was resurveyed by the Bangalore Development Authority, indicating the population as 6.16 million. The decadal population figures and the growth rate from year 1951 to 2001 have been given in the table below and the projected population till 2021 is shown in the charts below:

<table>
<thead>
<tr>
<th>Census Year</th>
<th>Population (Million)</th>
<th>Decadal Growth (Percentage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1951</td>
<td>0.80</td>
<td>--</td>
</tr>
<tr>
<td>1961</td>
<td>1.21</td>
<td>51.25</td>
</tr>
<tr>
<td>1971</td>
<td>1.68</td>
<td>38.84</td>
</tr>
<tr>
<td>1981</td>
<td>2.94</td>
<td>75.00</td>
</tr>
<tr>
<td>1991</td>
<td>4.13</td>
<td>40.48</td>
</tr>
<tr>
<td>2001</td>
<td>5.68</td>
<td>37.53</td>
</tr>
</tbody>
</table>

*Lang LaSalle Report 2010*
The demographic profile of Bangalore has changed rapidly over the last decade due to the massive in-migration of people into the city following the IT boom. This in-migration has included persons from various parts of the state and country, cutting across different income groups and cultural backgrounds. It has added to the multicultural flavor of the city and been one of the main drivers of latest trends and lifestyles entering the city. In this sense Bangalore is perhaps one of the most cosmopolitan cities in the South India region.

**Literacy:** In terms of literacy rate, Bangalore has the second highest literacy rate (83.91%) for an Indian metropolis, after Mumbai. Out of this, the male literates accounted for 88.36% and 78.98% were female literates. The number of households in Bangalore is about 12.92 Lakhs as per Censuses 2001.

**Household Size:** The average household size at Bangalore is 3.86 which is a reduction from 4.5 that existed in 2006 (Source: Skyline India 2008-09).

**Per Capita Income:** The Per capita income of Bangalore at present is Rs. 88,991 per annum.

### 4.5 Socio-economic classification

Bangalore has about 33.4% of SEC A and B population in city in comparison to other metro cities in India.

**Source:** Jones Lang LaSalle Report 2010

**Consumer Population:** Bangalore is India’s fourth largest FMCG, clothing and footwear market. The city is the third-largest hub for high net worth individuals (HNWI/ HNIs),
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

after Mumbai and Delhi. IT population accounts for about 5% of the total population of Urban Bangalore (550,000 IT Professionals - 1/3rd of total IT professionals in the Country). Overall the socio-economic profile of the city indicates that the market is lucrative for the development of organized retail sector including entertainment and leisure.

**Youthfulness Index**: Very high (20% population: 18-24 years, 14%: 25-35 years). More than half of the employees in IT/ITeS sector are below the age of 28. Bangalore has a higher percentage 37% of consumer population (SEC A and B) in comparison to other metro cities in India. Bangalore’s position on Economy Index and Reside-In Index out of 112 cities surveyed is number one (Top city). "Economy" Index reflects the economic conditions in a particular city, opportunities to start a new business, investment etc while “Reside-In” Index reflect a city's suitability for residing based on the following Sub-heads: Health, Education, Environment, Safety, Public Facilities, Entertainment and Housing.

<table>
<thead>
<tr>
<th>City</th>
<th>Annual Per capita income of Urban Household</th>
<th>Annual capita savings of Urban Household</th>
<th>Percentage of Savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bangalore</td>
<td>88,991</td>
<td>28,355</td>
<td>32 %</td>
</tr>
<tr>
<td>Chennai</td>
<td>87,446</td>
<td>19,455</td>
<td>22%</td>
</tr>
<tr>
<td>Delhi</td>
<td>78,660</td>
<td>17,962</td>
<td>23%</td>
</tr>
<tr>
<td>Hyderabad</td>
<td>69,493</td>
<td>20,386</td>
<td>29%</td>
</tr>
<tr>
<td>Mumbai</td>
<td>123,032</td>
<td>16,510</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Source: Skyline India 2008-09*

According to the Mercers Worldwide Quality of Living Survey 2010 for 221 cities globally, Bangalore is best placed at 140th rank this year, an improvement of two ranks from the year 2009.

### 4.6 Economic Activities

Modern industrialization in Bangalore started during the early 20th century when the princely state of Mysore took pioneering steps to promote industrial growth in the state. After independence in 1947 for four decades, the GoI made substantial investment in building the city’s large-scale knowledge-based public sector research and production facilities as well as the Nation’s most sensitive and advanced military and space research facilities. Between 1956 and 1960, large public sector undertakings like Bharat Electronics Limited and Hindustan Aeronautics Limited were established by the GoI in Bangalore, along with National Defense Research Laboratories. In the 1970s,
the Indian Space Research Organizations (ISRO) and Bharat Heavy Electrical Limited were also located here. In the 1980s, due to soaring real estate costs and overcrowding in Mumbai, there was an influx of Mumbai industrialists who relocated the hi-tech aspects of their businesses to Bangalore.

During the 1990s, Bangalore developed into a preferred location for hi-tech industries such as electronics, information technology and telecommunications and emerged as a globally integrated centre of technology research and production. Presently this has resulted in significant in-migration of intellectual / knowledge population from various parts of the country contributing to the decadal growth of 38 percent. Karnataka is among the top five industrialized states in the country and is the science capital of India with more than 100 R&D centre’s and majority of them are in Bangalore. Bangalore has been contributing almost 33-37% of national software export revenues over the last decade and thus is rightfully tagged as the Information Technology (IT) Capital of India. The physical growth in Bangalore is fuelled by the IT-ITES and the Bio-Tech sector. There are more than 2,000 STPI registered companies in the city. These companies are contributing nearly Rs.72,669 crores which is nearly 32.68 percent of the national revenues for software exports. IT/ITeS sector is growing at a compounded annual average growth rate of 25.67 percent over the past three years. The software export of Bangalore with respect to Karnataka and the nation is shown in the table below.

<table>
<thead>
<tr>
<th>Year</th>
<th>Bangalore</th>
<th>Karnataka</th>
<th>India</th>
<th>Sectoral Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(Bangalore - Karnataka)</td>
</tr>
<tr>
<td>2004-05</td>
<td>26,720</td>
<td>27,600</td>
<td>74,019</td>
<td>96.81%</td>
</tr>
<tr>
<td>2005-06</td>
<td>36,633</td>
<td>37,600</td>
<td>100,965</td>
<td>97.43%</td>
</tr>
<tr>
<td>2006-07</td>
<td>47,250</td>
<td>48,700</td>
<td>144,214</td>
<td>97.02%</td>
</tr>
<tr>
<td>2007-08</td>
<td>59,142</td>
<td>60,800</td>
<td>184,140</td>
<td>97.27%</td>
</tr>
<tr>
<td>2008-09</td>
<td>72,669</td>
<td>74,929</td>
<td>222,360</td>
<td>96.98%</td>
</tr>
</tbody>
</table>

After establishing itself as an IT and BPO hub, Bangalore has successfully attracted the Biotech industry. Bangalore currently houses approximately 47% of the total biotechnology companies in India. The Karnataka government’s various initiatives such as a biotech policy, fiscal incentives and proposed biotech park in Bangalore are likely to aid the process. Karnataka is one of the few states to come out with a clear-cut biotechnology policy called ‘The Millennium Biotech Policy’, while the Centre is still dithering to formulate such a policy at the national level. Karnataka’s policy
promises to establish a biotech corridor and the state has also set up a ‘Vision Group on Biotechnology’ to provide an impetus to the growth of the sector through other initiatives. Some of the major industrial estates and IT & ITeS hubs in Bangalore are shown in the map below:

![Map of Bangalore industrial estates and IT & ITeS hubs](image)

*Source: Real Estate Market Research & Analysis; Jones Lang Lasalle; July 2010*

### 4.7 Tourist Footfalls

Tourist destinations in Bangalore together experience nearly 1.75 crores annual tourist footfalls throughout the year.

*Table 1: Annual Tourist Footfalls (2014 Tourist Data)*

<table>
<thead>
<tr>
<th>District</th>
<th>Tourist Destinations</th>
<th>Domestic</th>
<th>International</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bengaluru (Rural)</td>
<td>Ghati Subramanya</td>
<td>10,86,257</td>
<td>0</td>
<td>10,86,257</td>
</tr>
<tr>
<td></td>
<td>Tippu Birth Place &amp; Fort Devanahalli</td>
<td>3,78,914</td>
<td>0</td>
<td>3,78,914</td>
</tr>
<tr>
<td></td>
<td>Shivagange</td>
<td>8,18,449</td>
<td>0</td>
<td>8,18,449</td>
</tr>
<tr>
<td>Bengaluru</td>
<td>Lalbagh</td>
<td>36,85,517</td>
<td>14,148</td>
<td>36,99,665</td>
</tr>
</tbody>
</table>
Thus, the average tourist footfall in Bangalore will be 11 lakhs. Taking into account that nearly 50% of the total number of tourists would visit the newly developed Lego Theme Park, the annual tourist footfalls of the project would be nearly 6 lakhs.

### 4.8 Physical Infrastructure

There are various proactive measures taken up by the GoK in augmenting & expanding the city’s physical infrastructure and developing major infrastructure projects to encourage the overall economic development of the city. The following map presents some of the key existing and proposed road networks of the Bangalore City, which have been the factors fueling the physical growth of the city.

**Source:** Real Estate Market Research & Analysis; Jones Lang LaSalle; July 2010
Table 2: Salient Features of Major Infrastructure Projects in Bangalore

<table>
<thead>
<tr>
<th>Name of the Infrastructure Initiative</th>
<th>Executing Agency</th>
<th>Development Phase</th>
<th>Location</th>
<th>Area / Coverage</th>
</tr>
</thead>
</table>
| Bangalore International Airport       | Bangalore International Airport Limited    | ▪ Initial Phase - May 2008, additional phases will be completed based on the air traffic flow  
▪ Planning for terminal -2 and land side development has commenced | Devanahalli     | 4,050 acres     |
| Peripheral Ring Road                  | Bangalore Development Authority            | PRR 1: 65 km stretch connecting Hosur Road and Tumkur Road running through the north-eastern quadrant of Bangalore cutting across Bellary Road.  
PRR 2: This is the second phase connecting Hosur Road and Tumkur Road covering the south-western quadrant of the city for a length of 51 km  
*Expected to boost connectivity to BIA from various parts of the city.*  
*Status*: Final stages of land acquisition. Construction work expected to commence in the next 3-4 months.  
*Date of Completion*: 30 months from the start date of construction i.e. mid 2013  
▪ *Estimated Budget*: Approximately Rs. 3000 crores | Bangalore       | 109 km          |
| Metro-Rail Corridor                   | Bangalore Metro-Rail Corporation Limited   | ▪ Phase-I (East-West Corridor of 18.1 km in length and it will start at Byappanahalli (NGEF Complex) and terminate at Mysore Road. It would cover Indiranagar, CMH Road, Swami Vivekananda Road, M.G. Road, Ambedkar Road, Post Office | Bangalore       | 33 km           |
**Development of Lego Theme Park, Bangalore, Karnataka**

GOVERNMENT OF KARNATAKA INITIATIVE

<table>
<thead>
<tr>
<th>Name of the Infrastructure Initiative</th>
<th>Executing Agency</th>
<th>Development Phase</th>
<th>Location</th>
<th>Area / Coverage</th>
</tr>
</thead>
</table>
| Bangalore-Electronics City Elevated Toll Expressway | National Highway Authority of India (NHAI) - Consortium of Soma Enterprises Limited, Nagarjuna Construction Company and Maytas Infra Private Limited | - This is a Rs. 7650 million project, implemented in the Bangalore-Hosur section on a Build Operate Transfer (BOT) basis.  
- Bangalore Elevated Toll-way Limited is the special purpose vehicle (SPV) formed for this project. The SPV will operate the expressway for a period of 20 years.  
- The project was inaugurated on 22nd January 2010. This has brought down travel time from 40 min to 10 min from Silk Board junction to Electronic City | Bangalore-Hosur section of Hosur Road - Silk Board junction to Electronics City | 9.98 km |

- North-South Corridor of 4.9 km will start at Yeshwanthpur and terminate at Jayanagar. It would cover Chord Road, Mahakavi Kuvempu Junction, Swastik, Platform Road, KSRTC Bus Stand, Chickpet, City Market, K.R. Road, Vani Vilas Road, Lalbagh, R.V. Road, South End Circle and Jayanagar.  
- The Extended Phase I is along the North-South corridor. The Yeshwanthpur station is further linked to the Hessaraghatta station which is 5.6 km away and RV Station to Puttenahalli is 3.7 km.  
- **Status:** Part of Phase 1 connectivity linking Byappanahalli and MG Road to be made operational by end of 2010. Rest of the work is under progress.
## Development of Lego Theme Park, Bangalore, Karnataka

**GOVERNMENT OF KARNATAKA INITIATIVE**

<table>
<thead>
<tr>
<th>Name of the Infrastructure Initiative</th>
<th>Executing Agency</th>
<th>Development Phase</th>
<th>Location</th>
<th>Area / Coverage</th>
</tr>
</thead>
</table>
| Bangalore-Mysore Infrastructure Corridor | Kalyani Group of companies, VHB International Limited, SAB International Ltd | ▪ Phase-I: This phase started in the year 28th April 1999 and it is stated that the whole corridor project has been divided into "stand alone" development projects. These distinct project phases are expected to be commissioned over a period of 13 years.  
▪ **Status:** WIP, certain stretches are already operational. The feeder roads are ready and already operationalised except for stretch near Bannerghatta road. This has helped link Bangalore South and West. | Southern Section of the Outer Peripheral Road: 41 km connecting NH-7 and NH-4  
Bangalore-Mysore Expressway: 111 km connecting Mysore and Bangalore  
Link Road: 9 km connecting the Bangalore-Mysore Expressway to SH-17  
Elevated Link Road: 3 km of elevated expressway connecting the link road to downtown Bangalore | |
| Bangalore Helix | Phase-I: National Building Construction Corporation  
Phase II: Alexandria Real Estate Equities Incorporation | ▪ Phase-II (Build Own Operate Transfer) | Electronic city off Hosur Road | 106 acres |
| High-Speed Rail Link | Karnataka State Industrial Investment Development Corporation | ▪ Cost estimated at Rs. 6,900 crore. The winning bid to be announced in Oct 2010  
▪ The 34-km rail link will cover distance from city to BIA in 25 minutes  
▪ Proposed to be integrated with Metro at Minsk Square; with Metro Phase II at Yelahanka and proposed mono-rail at Hebbal  
▪ **Status:** Identification of Land parcels underway. Expression of | Connects M G Road to BIA and traverses Cubbon Road, Chowdaiah Road, Ramana Maharshi Road, Bellary Road and corridor after Hebbal | -- |
## Development of Lego Theme Park, Bangalore, Karnataka

**GOVERNMENT OF KARNATAKA INITIATIVE**

<table>
<thead>
<tr>
<th>Name of the Infrastructure Initiative</th>
<th>Executing Agency</th>
<th>Development Phase</th>
<th>Location</th>
<th>Area / Coverage</th>
</tr>
</thead>
</table>
| Intermediate Ring Road (IRR)          | National Highways Authority of India | - Interest (EOI) invited from eligible national and international entities for Design, Build, Finance, Operate, Maintain and Transfer of the HSRL Project.  
- Five consortium groups are bidding for the project: Pioneer Infratech and Siemens Project Ventures; Lanco Infratech and OHL Concesiones; L&T Transco; Reliance Infrastructure and CSR Nanjing Rolling Stock Company and ITD-ITD Cema Soma Enterprises Joint Ventures  
- The total length of the corridor covers a length of 250 km covering the entire Bangalore Metropolitan Region. The DPR for the same was completed on 2Q 2008.  
- The proposed corridor will circumventing the city beyond the proposed BDA Peripheral Road (110 km) connecting Tattekere, Harohalli, Bidadi, Thippagondanahalli, Nelamangala, Devanahalli, Nallur, Hoskote and Sarjapur and the existing international airport is about 6 km from the proposed corridor.  
- **Status**: Alignment frozen, Tenders to be floated, Land Acquisition | Passes through Tattekere, Harohalli, Bidadi, Thippagondanahalli, Nelamangala, Devanahalli, Nallur, Hoskote and Sarjapur. Lies between STRR and PRR across Bangalore periphery | 4182 acres |
| Satellite Ring Road                   | Bangalore Metropolitan Region Development Authority | - 367 km length connecting 7 major towns viz. Doddaballapura, Devanahalli, Hoskote, Anekal, Kanakapura, Ramanagara, Magadi  
- The road would be an 8 lane road including two service lanes  
- Connects each Town Ring Road of BMRDA Towns and Lies | Satellite towns: Devanahalli, Dobbuspet, Magadi, Ramanagara, Anakapura, Anekal, Hoskote and Doddaballpur | 6303 acres |
### Development of Lego Theme Park, Bangalore, Karnataka

**GOVERNMENT OF KARNATAKA INITIATIVE**

<table>
<thead>
<tr>
<th>Name of the Infrastructure Initiative</th>
<th>Executing Agency</th>
<th>Development Phase</th>
<th>Location</th>
<th>Area / Coverage</th>
</tr>
</thead>
</table>
| Mono Rail (Under Integrated Mass Transport System) | Bangalore Airport Air Link Limited | - The proposed routes with a total 60.0 km. it will be a feeder service or system for Metro Rail  
- It is expected that Monorail will handle up to 64,000 during peak hour peak direction trips.  
- Work on Monorail will begin by 1st quarter 2011 (January) and by September 2010, tender will be called of for the proposed development. | Hebbal to J P Nagar (Bannerghatta Road) along the western portion of Outer Ring Road (31.0 km)  
Peripheral Ring Road to Toll Gate along Magadi Road (9.0 km)  
Kathriguppe Road /Ring Road Junction to National College (5.0 km)  
Hosur Road – Bannerghatta Road Junction to PRR along Bannerghatta Road (15.0 km). | NA |
| Devenahalli Business Park | KSIIDC | - Feasibility study completed; RFQ under preparation to be released  
- Estimated cost of INR 9500 Crores | Devanahalli beside BIAL | 408 acres |
4.9 City Growth Trends

Bangalore having a strong presence in the IT&ITeS sector, telecommunication and other industries as well as educational institutes, research colleges, etc, resulted in large immigrant white collar population and also opened avenues for many real estate developers to build large scale developments across the city - commercial, residential, retail, hospitality etc. The following map presents the strategic locations of Bangalore and also the growth corridors of the city.

Source: Jones Lang LaSalle Report July 2010

Residential developments have been targeting primarily the middle and upper middle segments. In-terms of physical growth, most of the existing development have been witnessed along the corridors having significant presence of IT&ITeS activities. Accordingly, Hosur Road, Bannerghatta Road, Sarjapur Road, Marathalli Sarjapur Outer...
Ring Road and Whitefield have witnessed significant growth in terms of real estate development. All these locations lie on the South, Southeast and Eastern quadrant of the Bangalore city in close proximity to IT&ITeS and industrial development. Broadly Bangalore can be divided or classified into strategic locations like Central Business District (CBD), Secondary BD (SBD), Northern Suburb, Southern Suburb, Eastern Suburb and Western Suburb.

The CBD has limited land availability and it is densely populated with increasing traffic congestion. Physical growth potential is very limited as compared to other strategic locations in Bangalore. SBD is primarily triggered by the improved connectivity of ORR, proximity to city center and the suburban areas. These areas are best positioned to command premium owing to their proximity to good social and physical infrastructure. Suburban areas in Bangalore witnessed very high growth of real estate activities primarily because of lower land rates and other government initiatives such as Electronic City and EPIP Zone in Whitefield. The commercial development gave rise to the residential needs. Southern and Eastern Suburb continue to be on the radar of real estate developers, investors and buyers due to improved connectivity via Outer Ring Road and the elevated express way (along Hosur Road) to other parts of city is the driving factor for the real estate development.

The Western Suburb has not witnessed sufficient real estate growth due to the distance from the IT/ITeS hubs and existing Industrial profile of the region. But presently many of these industries are either shutting down their operations and/or relocating to alternate locations to facilitate the land for the real estate development under commercial format. However, there are many infrastructure projects such as Proposed Elevated express way and Metro project in the micro market which will lead to improved connectivity and increase the real estate value in the coming future. In the case of Northern Suburb, urban infrastructure projects like International airport, eight laning of NH 7 highway, signal free junctions, proposed HSRL etc have made it easier to access the area unlike other suburbs and is increasing the interest of developers towards the area.
5. **Suggested Project Location**

Considering all the factors mentioned in the earlier chapters, the ideal location for developing a Lego theme park in would be North Bangalore. The supporting analysis of identifying North Bangalore as the project location is discussed below.

**Advantages of North Bengaluru:**

- Easily available Landbank only in the city.
- Airport Connectivity to Kempegowda International Airport.
- A cumulative investment of close to Rs. 1,15,000 Cr. worth would develop northern part of Bengaluru booming with activities.
- 413 MoUs were signed during Global Investors Meet (GIM) 2010.
- With all these investments and proposed development by Government and Private sector, the required consumer base will be created without difficulty.
- Average Tourist Footfalls of Bengaluru City is 89.9 Lakhs (2014 Tourist Statistics).
- Thus, the apt location for developing a Lego Theme Park will be North Bengaluru.
**Road Infrastructure:**

As the airport is 40km (25 miles) outside the city, a new high-speed rail link, is being planned to connect the city to the airport. The various road and rail connectivity means are as follows:

![Figure 1: Existing and Proposed Transit Corridors](image)

NH-7 to BIA is 6-lane divided carriageway. NHAI is in the process of widening the NH-7 from existing 6-lanes to 8-lanes, which can sustain higher traffic due to airport expansion and expected real estate developments on either sides of the NH-7. Bangalore Metro Rail covering a length of around 33 kms spread over the North-South and East-West Corridors is under construction by Government of Karnataka at an estimated project cost of INR 64 billion (US$ 1.5 billion).

In order to ensure fast and easy connectivity from Bangalore City Centre to the International Airport, Hi-Speed Airport Rail link of around 34 kms from CBD to the Airport is under development, which will enable passengers to reach the Airport around 25 minutes. Monorail is also planned for development to serve as feeder lines to metro lines. Commuter rail system enabled to connect Devanahalli with Yeshwantpur via Yelahanka.
Proposed Development:

The airport is expected to act as regional hub for global connectivity and would accelerate infrastructure & real estate development in and around the airport. As part of BIA project, a Special Economic Zone and commercial developments are proposed within the Airport.

The proposed growth of population and economy as per CDP is expected to generate high travel demand.
Development of Lego Theme Park, Bangalore, Karnataka

GOVERNMENT OF KARNATAKA INITIATIVE

Figure 3: North Bangalore Map
6. Project Concept

Travel and tourism, the world’s largest industry, is a key driver of economic growth. Given this background the development of appropriate infrastructure facilities for promoting tourism would go a long way in developing the state’s economy.

This Section discusses the concept of a Snow Park in the context of the Tourism Policy of Karnataka and other similar facilities established in India and abroad.

4.10 Tourism Policy

Karnataka Tourism Policy 2015 – 2020 also emphasizes upon undertaking an effort for developing Projects such as golf courses, cruise tourism, large entertainment studios, entertainment parks (small, medium and large), cable cars, tourism trains, filmcity, etc. to cater to different user segments. As per the Policy, various concessions are incentives are also offered by the GoK for developing projects in tourism sector.

4.11 Project Component and Land Requirement

Based on the review of similar theme parks in India and abroad and analysis of the amusement park industry, the following components are suggested at the proposed Lego Theme Park in Bangalore:

<table>
<thead>
<tr>
<th>Sl. No</th>
<th>Facility</th>
<th>Components</th>
</tr>
</thead>
</table>
| 1.    | Rides with a built-up area of 20,000 sq.ft | Would comprise:  
1. Construct Lego towers to withstand earthquakes.  
2. Become part of the action during 4D-movie.  
3. Drive electric Lego cars at the driving school or pilot a plane in the Land of Adventure etc. |
### Development of Lego Theme Park, Bangalore, Karnataka

**GOVERNMENT OF KARNATAKA INITIATIVE**

<table>
<thead>
<tr>
<th>Sl. No</th>
<th>Facility</th>
<th>Components</th>
</tr>
</thead>
</table>
| 2.     | Water Park with a built-up area of 20,000 sq.ft | Would comprise theme based rides:  
1. Water Slides into a swimming pool  
2. Aqualoop  
3. Sea life aquarium  
4. Multi – liner racer etc. |
| 3.     | Food court with a built-up area of 3,000 sq.ft | Easily accessible from the Lego Theme Park and FEC, the food court should have sufficient capacity to manage the number of visitors. |
| 4.     | Landscaping | Would include open space planning, gardening, picnic zones and other spaces |
| 5.     | Infrastructure | Would include toilet, parking etc. |
| 6.     | Live Show/ Program Zone with a built up area of 15,000 sq. ft. | Would include an open air theatre and seating area |

For developing the above mentioned facilities in the Lego Theme Park, a minimum area of **5 acres** will be required.

### 4.12 Project Cost

For developing the above mentioned facilities in the Lego Theme Park, the tentative project cost estimation is shown below.

<table>
<thead>
<tr>
<th>Sl. No</th>
<th>Item</th>
<th>Total Cost (Rs. Crores)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Rides</td>
<td>20.0</td>
</tr>
<tr>
<td>2.</td>
<td>Water Rides</td>
<td>25.0</td>
</tr>
</tbody>
</table>
## Development of Lego Theme Park, Bangalore, Karnataka

### GOVERNMENT OF KARNATAKA INITIATIVE

<table>
<thead>
<tr>
<th>Sl. No</th>
<th>Item</th>
<th>Total Cost (Rs. Crores)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Food Court</td>
<td>4.5</td>
</tr>
<tr>
<td>4.</td>
<td>Landscaping/ Gardening</td>
<td>2.5</td>
</tr>
<tr>
<td>5.</td>
<td>Basic Infrastructure Facilities</td>
<td>4.5</td>
</tr>
<tr>
<td>6.</td>
<td>Live Show/ Program</td>
<td>6.0</td>
</tr>
<tr>
<td></td>
<td><strong>Total Base Cost</strong></td>
<td><strong>62.5</strong></td>
</tr>
</tbody>
</table>

Thus, the total cost for developing a Lego Theme Park in Bangalore would cost Rs. 62.5 Cr.
7. **Way Forward**

The activities involved in taking the assignment forward and the key drivers for the Project are discussed in this Chapter.

5.1 **Activities**

The following activities would be carried out in preparation of the Project Report for the proposed theme park:

a) M/s Jones Lang LaSelle has been appointed by iDeCK to conduct a market study for the Project. iDeCK would co-ordinate the market study activities and obtain the required inputs for preparation of the Project Report.

b) Discussions with key amusement / theme park owners / operators to understand the project requirements.

c) Detailed review of cases studies of theme parks that are similar in nature to the proposed park to understand the project facilities / components and the key drivers for success of the Project.

d) Assessment of footfalls to the park and financial viability of the park under different scenarios.

e) Facilitate discussions between DoT and interested players in the amusement/ theme park industry.

5.2 **Key Project Drivers**

The following issues would be critical in ensuring the implementation and success of the Project:

**Land**

The minimum land requirement for the Project would be about 50 – 100 acres. During preliminary discussions with KIADB officials, it was indicated that the land required is available at Doddaballapura and could be assigned for development of the Project. DoT would need to pursue with KIADB for assigning the required land to develop the theme park Project. Availability of land is critical for commencing the Project development activities.

**Accessibility**
The identified location for the Park is almost 75 km from Bangalore city. To facilitate commute of tourists to the Park, it may be required to provide transportation facilities to and from the Project site at periodic intervals through the day. Also the site must be easily accessible by road from the main national highway.

**Infrastructure**

The physical infrastructure including roads, water supply, power, etc for the Project site need to be in place for operationalizing the Project facilities and is a key concern for the private developer / operator as well as for the public intending to visit the Project. DoT / GoK would need to plan for the basic infrastructure facilities at the identified Project site prior to offering the Project to the private developer / operator.

**Facilities / components**

The facilities offered by the theme Park would need to be carefully planned to provide something of interest to all age groups. The success of the Project would depend on the capability of the Park to attract visitors on a continual basis. This would mean that the offering of the Park would need to be cater to all age groups and must provide a variety of options to encourage tourists to spend at least a few days at the Park. Attractive package offers, seasonal / non-seasonal offerings and pricing would be important drivers for the success of the Park.