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Splash Factor Report

A 'State of the Nation' on the water ride market



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Methodology

The report is based on a quantitative research that we conducted in 2018 through an anonymous Splash Factor survey among parks across North America, Europe, Middle East, and Asia. The survey was aimed at assessing the participating park's water ride component in the overall park ride mix and comparing it with industry benchmarks. The report articulates the findings of the survey while emphasising the emerging trends in the water rides market.

Table of Contents

Foreword.....	1
Top Findings.....	2
Insights: Trends Worth Noting.....	5
Operator Insights.....	10
WhiteWater Insights.....	11
Water Ride State Of the Nation.....	12



Foreword

Water rides are fundamental to any theme and amusement park experience. Despite their high-capacity family entertainment value, today most parks are yet to optimize these guest favourites to their full potential.

It's interesting that while technology-driven attractions continue to grow, the more traditional form of attractions retain the 'classic' value attached to them and cannot be replaced.

Coveted by guests across age spectrums, it's inspiring to see how water rides have evolved over the years and retained their mass appeal. They continue to be the 'classic' must-have experience that every park has a weakness for.

But contrary to common perception, owning a water ride does not mean that you are utilising it to its full potential. Our survey findings tell us that an intelligent and profitable water ride optimization requires you to strike the right balance between the various experiences they offer.

We surveyed parks around the world with the idea to probe deeper into the enduring water ride appeal. Aimed to help parks optimize their water ride potential, the Splash Factor report shows trends in the water ride segment and ways to crack the code to high capacity guest entertainment through water rides.

We hope it equips you with fresh insight and gets you thinking on how you can make the most of these classic park attractions.

Best Regards,
Nathan A. Jones,
President, Park Attractions Division, WhiteWater



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Top Findings



It's time to tap into the untapped

- According to the survey findings, 3 out of every 4 parks have not optimized their water rides to their full potential, pointing to the huge opportunity and scope to enhance their water ride experience.

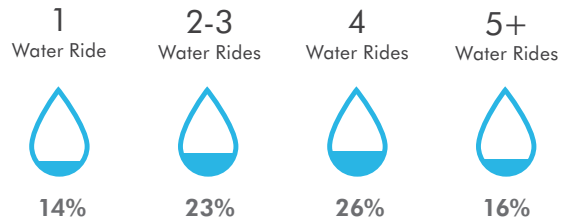
Scope for growth

- Originating from North America, the water ride market here is mature with a greater number of water rides as compared to Europe, the Middle East, and the rest of the world, where water rides seem to be under-represented as compared to other rides.

Where water rides are lacking

- The large established brand parks all report a good mix of water rides. But it's the medium and small-sized parks where water rides are lacking and have a bigger potential for diversifying those parks' guest experiences.

Number of Water Rides in a park



- In terms of the experiences they offer, water rides are most valued for:
 - Iconic big splash
 - Entertainment across age-groups
 - Classic flume experience offered by rides such as the Log Flume and Super Flume
- One in every 5 parks does NOT have a water ride.





How wet is wet enough?

Totally Drenched



27%

Sufficiently Soaked



58%

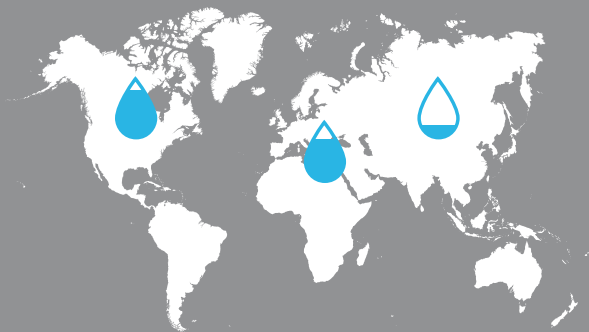
Lightly Misted



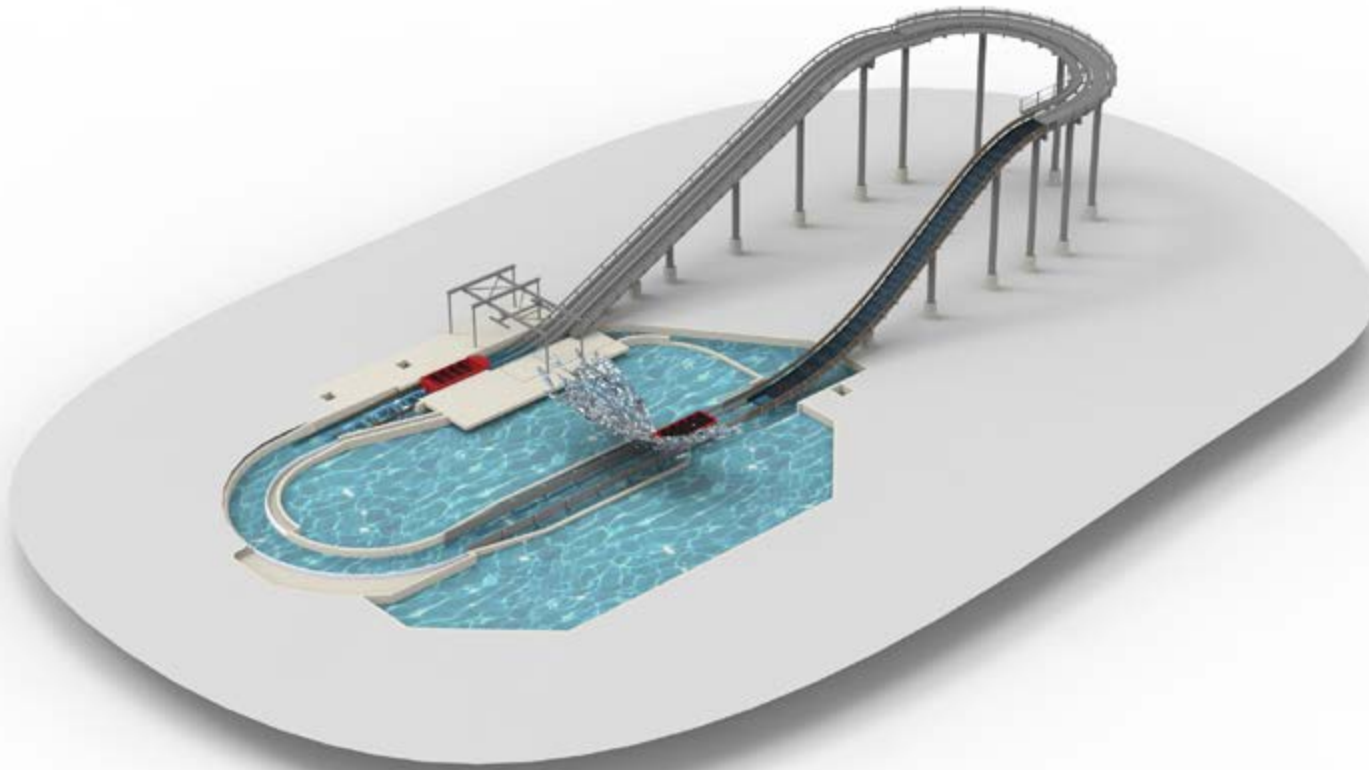
15%

- A majority of the respondents have water rides with the capacity of 1 to 4 guests per vehicle or more than 8 guests – underlining the continued popularity of Log Flumes and big-splash Shoot the Chutes.

In addition to these findings, from WhiteWater's years of experience of working with parks around the world, we have found that culturally and regionally it varies as to how wet the guests like to get. In Asia, unless you are at a water park, guests prefer lightly misted to getting shoes and clothes wet, whereas in the Americas and Europe, guests don't mind getting soaked with water.



Soak Factor Across Regions



Insights: Trends Worth Noting

Most parks are concerned about finding the right balance between making a splash and creating the right ride mix for optimum guest fulfillment. The Splash Factor report has been designed to help answer those concerns.

Water ride preferences in different regions

While there seems to be a fair distribution of water rides across different regions, it's Europe, the Middle East, and Asia Pacific where there has emerged the most opportunity to differentiate themselves by adding water rides. Parks in these regions need to carefully evaluate their ride mix and understand the experiences and choices they are missing on and can be leveraged to keep their guests happy. Not only is the amount of splash a strong preference in these regions, but the ability to participate in the fun without getting wet and the ability to get on and off the ride, without getting wet and/or retaining modesty.



Spinning Rapids Ride
Wuxi Sunac Land,
Wuxi, China

Number of water rides

To be able to enjoy a good splash quotient, you need to first ensure that you have a good balance of experiences in your park. The classic theme park has the following anchor rides guest expect to experience during their visit:

- Roller Coaster
- Carousel
- Dark Ride
- Water Ride
- Drop Tower
- Swing Ride
- Ferris Wheels
- Pendulum Rides

How does that balance look for you? Do you have at least one of each type of ride?

The benefit of 'wet' rides is the number of different types there are and therefore different experiences they can provide. This involves a careful selection of water rides that provide the right set of experiences that guests enjoy and compliment your park's ride formula. It is no accident that the most successful parks have two or more water rides to diversify their ride mix.



Jurassic Park River Adventure
Universal Studios,
Florida, USA



Timber Mountain Log Ride
Knott's Berry Farm
USA

Range of experiences and story-telling potential

Experienced operators understand how well their water rides provide the full-spectrum of experiences that guests seek.

An ideal water ride component could involve an optimum balance of any of the following experiences:

- Experience of a journey
- An iconic big splash
- Entertainment across age-groups
- Thrilling drops and turns
- Classic flume experience
- Interactivity between riders and spectators
- Floating sensation

Not only do water rides provide a range of physical sensations for the guest, they also provide an excellent back drop for story telling and theming such as the Timber Mountain Log Ride at Knott's Berry Farm, California that takes guests on a journey to a 19th-century lumber camp. And, the Jurassic Park River Adventure at Universal Studios, Orlando that takes guests on a scenic river cruise culminating in the pitch-black 85-foot plunge.

The right amount of splash

Listening to the screams and laughter as guests are doused on a water ride reminds you that despite being fully dressed, water is very central to the enjoyment these rides provide.

Park operators often test the 'right' amount of splash their guests enjoy (most water rides can dial this up or down). Sometimes, not enough splash can lessen the impact, while too much can make it overwhelmingly damp for their guests. According to our survey findings, most parks prefer to take a middle ground when it comes to soaking their guests, enabling them to make the most of their water ride experience with their clothes on. We are even seeing some very wet water rides being added to water parks now that provide yet another way to play together with water.

In summer a wetter ride can be very refreshing, but there are also ancillary revenue opportunities you can enjoy while helping guests by selling water proof capes in the line or Haystack Drying as they exit.

Hence, it needs to be considered how wet do you want your guests to get, while at the same time understand will you still have the iconic visual appeal that will draw your guests to your park and make them ride again and again. Our survey findings tell us that while most respondents prefer an iconic big splash, they would want their guests to be 'sufficiently soaked' as opposed to getting 'totally drenched' or 'lightly misted' with water.



Shoot the Chute
Parque Diverciones,
Costa Rica



Shoot the Chute
Parque Diverciones,
Costa Rica



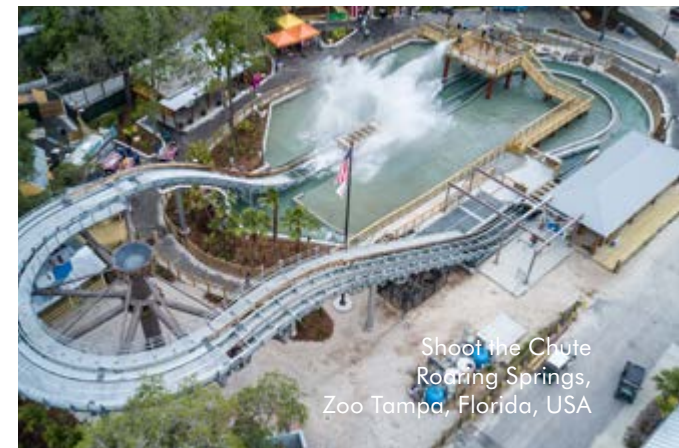
Infinity Falls Tower
Universal Studios,
Florida, USA



River Raft Ride
MOTIONGATE's Cloudy with A
Chance of Meatballs™



Spinning Rapids Ride
Haichang Ocean Park,
Shanghai, China



Shoot the Chute
Roaring Springs,
Zoo Tampa, Florida, USA

Capacity of water rides

In terms of capacity, it has emerged that while most respondents have water rides with the capacity of 1 to 4 guests per vehicle (likely the beloved log flume) and more than 8 guests (like the high capacity Shoot the Chutes), it's the water rides with the capacity of 5 to 8 guests that can be leveraged more. This indicates how rides such as the Super Flume can differentiate your park by offering forward and reverse drops with integrated turntable features along with the ability to integrate narrative to take your guests on a more immersive journey culminating with a splash.

You could also consider raft rides such as the River Raft Ride, providing a genuine river rafting experience and Spinning Rapids Ride, offering an intense, heart-pounding spinning sensation as they spiral down a flume, without getting completely soaked in water. WhiteWater's recently opened longest Spinning Rapids Ride at Haichang Ocean Park, China exemplifies this by differentiating the classic Spinning Rapids Flume Ride experience by including conveyor lifts, actual rapid rivers, tunnels, multiple drops, and the concluding giant Manta feature – something never done before with a Spinning Rapids Ride. The newest water rides being added into parks fit into this category of the more immersive river journey, such as SeaWorld®'s Infinity Falls which opened in 2018 and the WhiteWater installation at MOTIONGATE's Cloudy with A Chance of Meatballs™ river expedition.

Operator Insights

The quantitative data from this survey backs up what our customers say.

“Besides the regular maintenance work to prevent wear and tear, we haven’t made any changes to the ride ever since it was installed. But if given a choice to upgrade the ride, I would like to increase the duration making it longer, add more boats and may be also add a splash element.”- **Barry Stiltner, Director of Rides Maintenance, Dollywood**

“Visitors love the Splash Caribe attraction as it allows them to be in direct contact with water, and since Costa Rica is a tropical country, being able to get wet and cool off seems quite appealing to most guests. In terms of ride performance, Splash Caribe has the highest performance rate out of all the water rides.” - **Francini Córdoba, Gestor de Calidad, Parque Diversiones**

“Roaring Springs will provide thrills for guests while the continued transformation of the Florida Region improves the Zoo’s capacity to rescue threatened native wildlife throughout the state.” - **Joe Couceiro, CEO, ZooTampa, Florida**



Dollywood Theme Park
TN, USA



Parque Diversiones
San José, Costa Rica



ZooTampa,
Florida, USA

“Our new log ride tripled our ridership capacity and increased our online sales by 39%. Calaway Park could not be happier with our new ride.” - **Bob Williams, General Manager, Calaway Park**

WhiteWater Insights

“Making a splash is one thing and creating an impact is another. The critical thing here is identify whether you are making the most of your ride mix and take the right steps to fully optimize your water ride potential.” - **Nathan A. Jones, President, Park Attractions, WhiteWater**

“Water and stories are elemental components to humans. Water as sustenance, water as 60% of the human body, water for transportation. Water is interwoven in every aspect of our lives. Stories also have an integral place in our collective condition. We like to think our rides combine these two essential aspects of human life in unique and compelling ways to entertain and delight.” - **Kelly Sall, Water Rides Product Manager, WhiteWater**



Calaway Park
Alberta, Canada

Water Ride 'State of the Nation'

The data collected in our survey provided insightful views across parks, a 'state of the nation' for water rides. What we found is that the water rides continue to play an important part in the theme and amusement park ride mix because of the different physical experiences they provide for guests to enjoy, which compliment the overall park mix and make them 'expected' by guests.

The **inclusivity of these rides across age groups** makes them family crowd pleasers and good capacity fillers – reasons for their continued popularity and why parks like Knott's Berry Farm have been reinvesting in refurbishing their Log Flume.

We found that parks seem to rely on trusted favourites like the Log Flume and Shoot the Chute and **there are opportunities to differentiate** their offerings by adding other water rides such as river rides, which also provide the most scope to theme the experience.

The **cultural sensibilities towards getting wet vary** significantly from one region to another and cannot be ignored while planning water rides. The Asia and Middle East regions have emerged as more sensitive towards getting soaked as opposed to Europe and the Americas.

The optimal number of water rides in your park appears to be correlated to the size of your park, with the largest parks unsurprisingly providing the most number of water rides. 20% of parks in the survey have a significant gap in their ride mix with no water ride at all, whereas for most parks, **2 to 3 water rides appear to be the sweet spot**. If you reflect over your ride mix and want to talk about how a water ride can help, please get in touch!





This report proves that water rides have an enduring appeal and satisfy guests in a number of ways. We invite you to review your water ride portfolio with these findings in mind. Here is a checklist to help you identify if you have all the experiences covered or if there are gaps that you need to address:

Do you have the following wet experiences ticked off?

- A wonderfully wet river adventure (River Raft Ride)
- A big iconic splash to shower spectators (Shoot the Chute)
- A heart stopping backwards, or forwards, plunge (Super Flume or Log Flume)
- An interactive water battle, boat to boat, spectator to boat and back (Raft Battle)
- A relaxing scenic journey (Water Transportation System)

Reach out to us to learn more on how we can help you optimize your water ride potential.

If you have identified that there are experiences you can add, give us a call at **+1 604 273 1068** and we'll take you through WhiteWater's enhanced water ride offerings that can help you fill the gaps.



Amikoo Park and Resort
Concept, Planned in Mexico



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WhiteWater was born in 1980 with one clear purpose, to create places where families unite and make joyful lasting memories.

We achieve this by standing alongside our customers from concept to completion of award-winning attractions, from slides to water rides and everything in between. We aim to inspire our clients by unleashing our creativity to realize their ambitions; we craft solutions which make each park unique. We are dedicated to making products that operators can count on, because we understand the importance of reliability and efficiency on the bottom line.

As market leaders, we put our success down to our attitude, in all our years we've never once forgotten why we're here – to help parks solve problems, create immersive experiences, and delight guests all over the world.

We're here to create places where fun can thrive.

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