



Virtual Reality Check

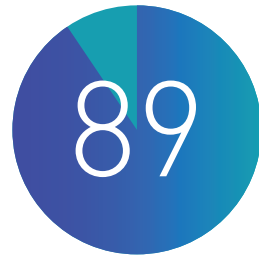
The 6 Things Guests Want with
Theme Park VR and Thinkwell's 5 VR
Recommendations

Virtual Reality, Augmented Reality, Mixed Reality. VIVE, Oculus Rift, PlayStation VR, and Six Flags VR Coasters. We are drowning in VR news, events, articles, and happenings and we imagine you are, too. So for 2016 Thinkwell decided to ask some 1,400 international respondents how interested they were in virtual reality, would they go out of their way to visit a virtual reality attraction, what would they spend for such an enhanced experience, and what might their concerns be if they visited such a cutting-edge attraction. Some of their responses were quite surprising.

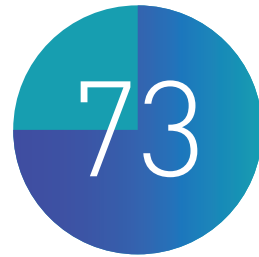


1 Theme Park Guests are Really Interested in VR

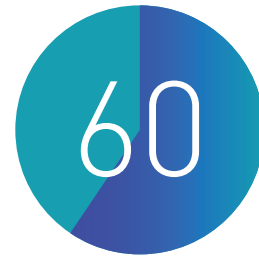
VR is so buzzy right now and that might have a lot to do with this statistic, but theme park goers are extremely interested in the idea of some kind of virtual reality-enhanced attraction or experience.



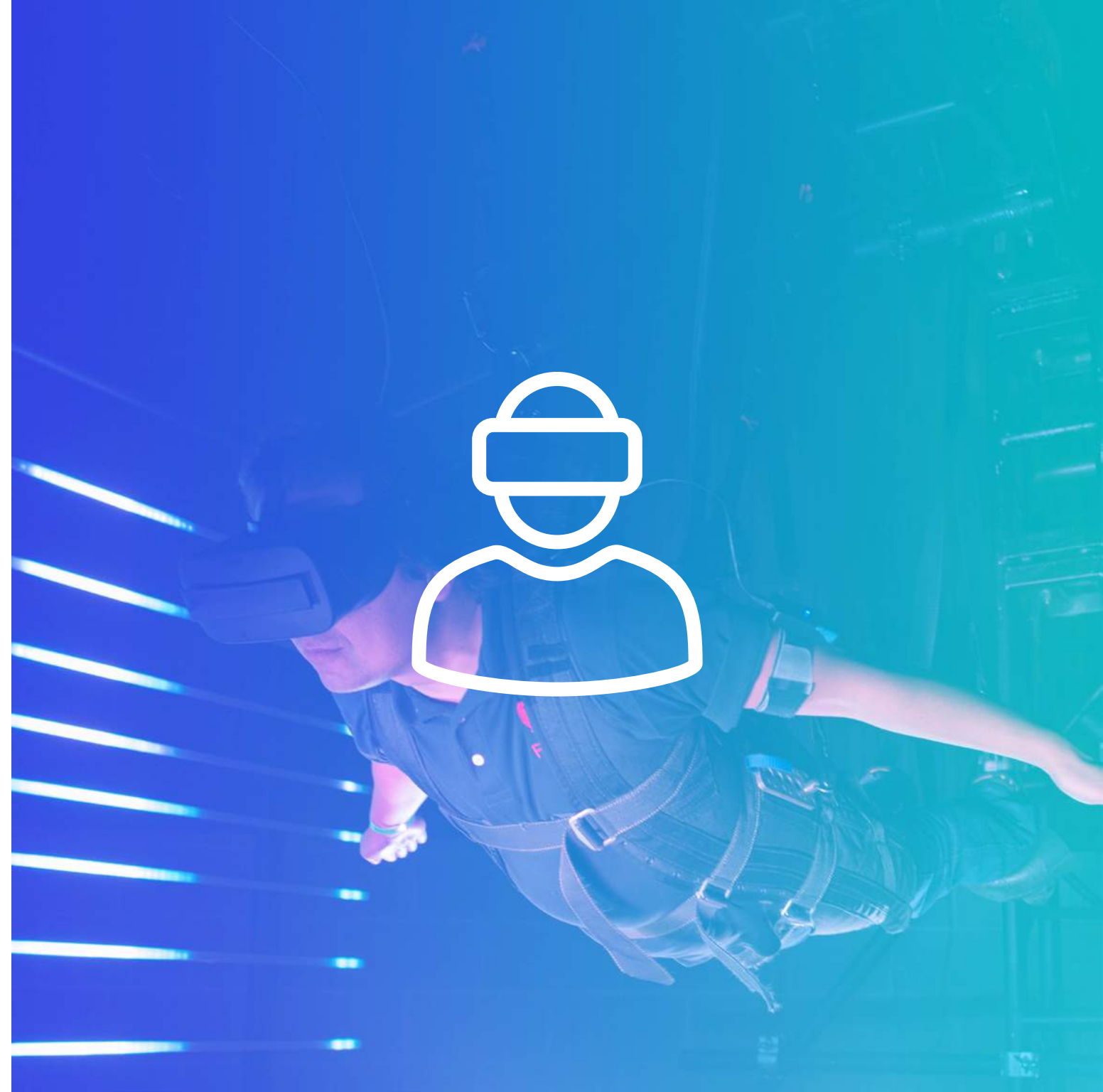
Percent familiar with VR



Percent interested in trying a VR experience at a theme park



Percent describe VR as exciting





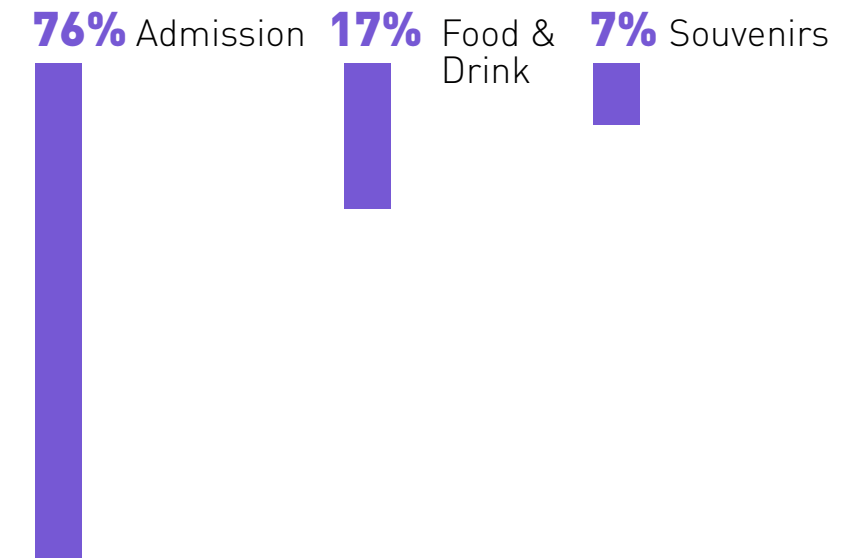
2 They Paid Up So Don't Shake Them Down

Survey respondents are resoundingly against the idea of spending more once they were in a theme park for an enhanced virtual reality experience. Given the price of admissions, food and beverage, and souvenirs, guests are most definitely not inclined to pay more.



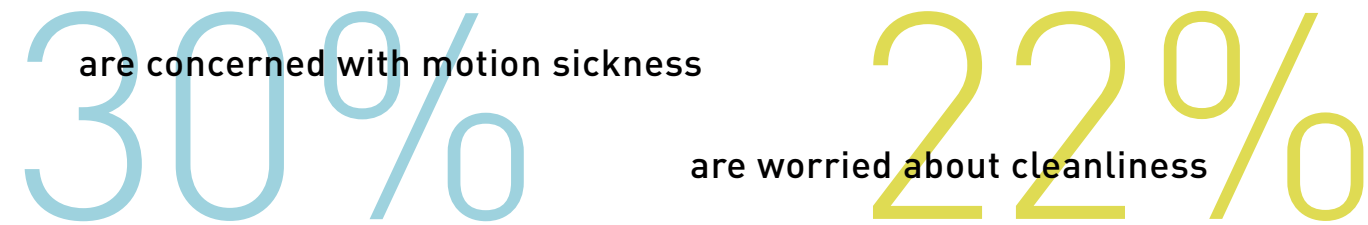
Percent **not** willing to pay more for a VR experience

Breakdown of current perceived consumer spending during a theme park visit:



3 Theme Park Guests Don't Want to Get Sick

Though there's a lot of excitement and interest in VR and how virtual reality might be used in an attraction, many survey respondents were concerned about how the tech might affect them. Many cited concerns over health (cleanliness of VR goggles, motion sickness) as primary barriers to deciding to experience a VR attraction.



4 But They Really, Really Want to Do This!

Surprisingly, even with concerns over potential upcharges, health and safety apprehensions, and more, a whopping **73%** of all respondents were extremely interested in what virtual reality could offer in a theme park experience.

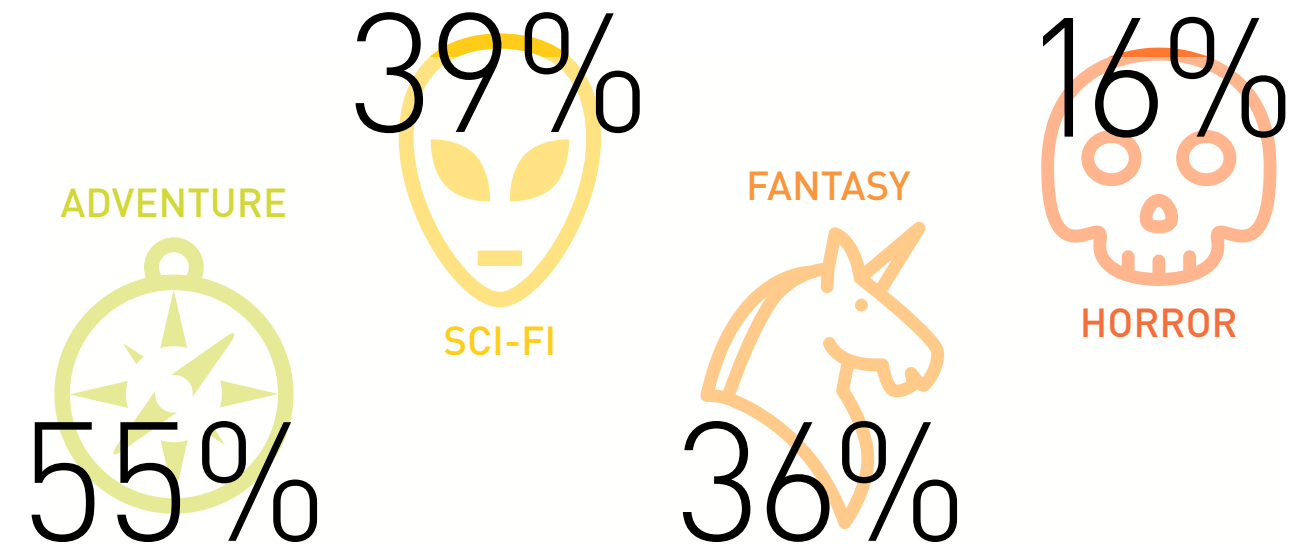


5 Guests Want Adventure, Not Anxiety

Another surprising discovery comes when respondents were asked what genres might be exciting to them for a VR experience. Horror is one of the most popular VR genres in virtual reality software and games today as it offers a first-person point-of-view experience ripe for scaring the bejeezus out of people. Science fiction is also an extremely popular genre.

But theme park guests were most interested in Adventure as a genre for VR-enhanced attractions by a wide margin (+16%). This suggests visitors want to be swept away to fantastical places full of magic and fictional creatures, not be placed in the midst of a fright film.

What type of theme would you want your virtual reality experience to follow?



6 But Sophisticated Theme Park Guests are Willing to Spend for Sophisticated Experiences

Sophisticated theme park guests* are more willing to pay an upcharge to experience a virtual reality attraction. People who visit parks less frequently or are more interested in roller coasters weren't interested in spending more.

*Of respondents that visited a theme park three or more times per year AND prefer dark rides / water rides over thrill rides / family rides



Percent would be willing to pay more for a VR experience



CONCLUSION

Virtual Reality: I know what it is but what is it?

The average theme park goer has heard the term “virtual reality” but really doesn’t quite know what it is. Based on that, they have a hard time imagining what a “VR attraction” might be. As such, they may be less inclined to pay an upcharge for it.

Upcharge: friend *and* foe

Surveyed participants don’t want to spend more for a VR attraction in a theme park. That’s both bad news and good, because sophisticated theme park visitors are more discerning and therefore willing to pay for a VR-enhanced experience.

This means three things:

1

Parks like Six Flags and Warner Bros. Movieworld in Australia are ahead of the game because they are offering their VR coasters with no upcharge.

2

VR attractions in theme parks may apply an upcharge simply as a means to reduce capacity demand as most VR experiences are lower capacity and/or have higher cycle times due to fitting riders with gear.

3

Theme park operators need to consider what it means to create a truly high capacity VR experience—something that does not exist in the market today.

VR Might Be Best Stand-Alone.

Perhaps the best place for VR is in stand-alone attractions. These have lower capacity requirements and pay-to-play scenarios are more acceptable to consumers in these venues. Consider the Ghostbusters VR experience at Tussaud’s Wax Museum in Times Square. At \$55 per person and an estimated capacity of 60 per hour, the virtual reality experience there is a perfect enhancement, while such an offering at a theme park would either be too low capacity or too high an upcharge.

High Capacity VR Needs to be Developed to be Feasible for Theme Parks.

VR today is in the dozens per hour range in terms of capacity. High capacity VR attractions need R&D so that virtual reality can become a staple in the theme park industry.

The Ultimate Solution Might Be Augmented Reality.

Augmented Reality, or AR (also called Mixed Reality), allows users to see enhancements to the real world through the use of special glasses (think Microsoft’s HoloLens or Magic Leap’s developing technologies). This means experiences can be created wherein much of the huge (and previously expensive) special effects, creatures, and illusions are delivered in the glasses, rather than in the physical environment. Since AR/MR is still nascent, only time will tell.

Interest is high in virtual reality, augmented reality, and mixed reality. Certainly Thinkwell’s 2016 Guest Experience Trend Report supports that and shows that theme park guests are eager to try VR on for size.



THINKWELL™
The Experience Company

Thinkwell is a global design and production company that connects companies with custom content-driven experiences in the physical world.

Published Annually, the Thinkwell Guest Experience Trend Report provides valuable guest insight on evolving trends that affect the creation of designed experiences.