

Hotel Waterpark Resort Industry Report - 2003

14 New Hotel Waterpark Resorts Open USA Lodging Industry Starts Slow Upward Trend,

by Jeff Coy and Bill Haralson

October 2, 2003. Although the USA hotel industry is still recovering from 9/11, War in Iraq, SARs and troubled airlines, hotel occupancy reached a respectable 60.8% for year to date as of August 31, 2003 --- just slightly under the 61.2% of a year ago. Hotel room prices averaged \$83.60, which is less than a dollar below a year ago. Revenue per available room reached \$50.87 compared to \$51.45 a year ago.

	2003	2002	% Change
Occupancy	60.8%	61.2%	-0.7
ADR	\$83.60	\$84.01	-0.5
RevPAR	\$50.87	\$51.45	-1.1
Source: Smith Travel Research. YTD August			

Revenues, supply and demand all showed positive growth. Hotel industry room revenues were up 0.2% in 2003 over 2002 for the period January through August. Hotel developers continued to build new hotel rooms as the supply was up 1.4%. Hotel room demand growth of 0.7% still lagged supply growth, but it does indicate that more room nights were occupied so far in 2003 than the same period last year.

The July 4th Weekend in 2003 was the turnaround point for the USA hotel industry. In July, August and through the final days of September, both hotel occupancy and average room rates were up over the same period last year. In fact, almost all the indicators are pointing up and it appears we are in a slow recovery.

	Aug 2003 Vs Aug 2002	Jun-Aug 2003 Vs Jun-Aug 2002	Rolling 12 Aug 2003 Vs Rolling 12 Aug 2002
Supply	Up 1.4%	Up 1.3%	Up 1.4%
Demand	Up 3.1%	Up 2.4%	Up 2.0%
Occupancy	Up 1.8%	Up 1.2%	Up 0.7%
ADR	Up 0.1%	Down 0.1%	Up 0.5%
RevPAR	Up 1.9%	Up 1.0%	Up 1.0%
Source: Smith Travel Research			

The USA hotel industry is likely to finish the Year 2003 equal to or slightly better than 2002 -- due to a poor first half and a better than expected second half, according to the 80 hotel experts from around the world who attended the International Society of Hospitality Consultants Meeting last week. The real improvement will come in 2004, they said.

The award for keeping the hotel industry alive and well during the last two years goes to consumers and leisure travelers who continued to spend and take short vacations albeit closer to home. Business travelers still haven't come back to hotels in any great numbers.

However, resorts are running a higher occupancy in 2003 than 2002 and higher than any other type of lodging. Many families that declined to board an airplane got in their cars and drove to a regional resort --- and some of these were resorts with indoor waterparks.

Building the Hotel Waterpark Resort Database

The hotel industry measures the performance of different types of hotels including ski resorts and golf resorts. But no one tracks the performance of waterpark resorts. Recently, hotels and resorts with indoor waterparks have experienced rapid growth outside Wisconsin Dells, where the concept originated. Neither the hotel nor the theme park industries provide any benchmarks or statistics for this new phenomenon.

Jeff Coy and Bill Haralson formed Hotel Waterpark Resort Research & Consulting, a collaborative effort of JLC Hospitality Consulting Inc of Rochester MN and William L. Haralson & Associates Inc of Richardson TX. Coy, a hotel consultant, and Haralson, an attractions consultant joined forces for the purpose of building an industry database for this product sector. Both were appointed co-chairs of Resort Task Force by the World Waterpark Association in October 2002. Their second annual industry report focuses on supply trends, sizing components, construction costs and operating ratios while future reports will incorporate demand trends.

USA Competitive Supply of Hotel Waterparks

Sixty-two (62) hotel indoor waterparks are open and operating in the USA. The hotel waterpark resorts are located in the following states:

2003	2002	State
28	25	Wisconsin
14	10	Minnesota
3	2	Michigan
3	2	North Dakota
3	2	South Dakota
2	1	Montana
1	2	Nebraska
1	1	Ohio
1	1	Missouri
1	1	Wyoming
1	0	Alaska
1	0	Colorado
1	0	Iowa
1	0	Kansas
1	0	Pennsylvania

These properties have a total of 9,781 rooms, nearly 1.3 million square feet of indoor waterpark space and 280 meeting rooms covering 567,779 square feet of meeting space. Of these 62 hotels, 35 are independent while 27 are affiliated with a national hotel brand

name. Hotel brand names include AmericInn, Best Western, Comfort Suites, Country Inn & Suites, Days Inn, Hawthorn Suites, Hilton, Hojo, Holiday Inn, Marriott, Microtel, Quality Inn, Ramada, Sleep Inn and Wingate. The following chart illustrates the growth in 2003 over 2002.

	2003	2002	% Change
Hotel Indoor Waterparks	62	50	24.0
Rooms	9781	7520	30.0
Indoor Waterpark Sq Ft	1,297,929	750,904	72.8
Meeting Rooms	280	213	31.5
Meeting Space Sq Ft	567,779	300,454	89.0
Affiliated with a Brand	27	20	35.0
Independent	35	30	16.7
Source: Hotel Waterpark Resort Research & Consulting.			

Fourteen new hotel waterparks opened in 2003

These new facilities are larger than average with more guest rooms, larger meeting spaces and bigger indoor waterparks.

New additions include: Quality Inn & Suites, Casper WY; Best Western Apache, Rochester MN; Great Wolf Lodge, Traverse City MI; Scotts Hotels & Splash Lagoon in Erie PA; Days Inn & Conference Center, Moorhead MN; Great Wolf Lodge, Kansas City KS; Wilderness On the Lake, Wisconsin Dells WI; Wingate Inn in Missoula MT; Country Inn & Suites, Prairie du Chien WI, Tundra Resort & Waterpark, Green Bay WI; Sleep Inn & Suites in Minot ND; Super 8 in Thief River Falls MN; Arrowood Resort & Conference Center in Alexandria MN and the H2Oasis in Anchorage AK.

Five of the 14 new additions were waterpark expansions at existing hotels while seven were total new construction projects; two properties were deleted from last year's report for a net gain of 12 new hotel indoor waterparks.

The H2Oasis, which opened in February 2003 in Anchorage AK, is the only privately-owned, commercial indoor waterpark in the USA that is not attached to a hotel. All other stand-alone indoor waterparks are publicly-owned aquatic centers that are typically subsidized by municipalities. The economics of indoor waterparks favor those attached to hotels where they add substantially to room revenues --- making the H2Oasis in Anchorage a first of its kind situation to watch over time.

Top 20 Largest Hotel Waterpark Resorts in the USA

Name	Location		Rooms	Indoor WP Sq Ft	Open
Wilderness Hotel & Golf Resort	Wisconsin Dells	WI	593	161,000	1995
Kalahari Resort	Wisconsin Dells	WI	378	125,000	2000
Bavarian Inn Lodge*	Frankenmuth	MI	357	30,000	1986
Grand Country Inn	Branson	MO	319	20,000	2001
Great Wolf Lodge	Wisconsin Dells	WI	309	44,000	1997

Treasure Island	Wisconsin, Dells	WI	302	65,000	1999
Chula Vista Resort	Wisconsin Dells	WI	300	30,000	1999
Great Wolf Lodge	Traverse City	MI	281	38,000	2003
Great Wolf Lodge	Kansas City	KS	281	38,000	2003
Great Bear Lodge	Sandusky	OH	271	33,000	2001
Hilton Center City (730)**	Milwaukee	WI	250	20,000	2001
BW Sterling Inn & Conference Center	Sterling Heights	MI	250	22,769	2001
Polynesian Resort	Wisconsin Dells	WI	230	38,000	1994
Hojo Resort Conference Center	Wisconsin Dells	WI	230	13,000	1994
BW Ramkota Hotel & Conference	Sioux Falls	SD	226	3,000	2002
Timber Ridge Lodge	Lake Geneva	WI	225	30,000	2001
Grand View Lodge	Nisswa	MN	200	7,500	2000
Arrowood Resort & Conference Ctr	Alexandria	MN	200	21,000	2003
Grand Harbor Resort & Waterpark	Dubuque	IA	194	25,000	2002
Ramada Plaza	Fargo	ND	185	10,000	1996

Source: Hotel Waterpark Resort Research & Consulting. * Bavarian Inn has no waterslides.

** Hilton Center City has a 250 room waterpark hotel within a 730 room convention hotel.

The largest hotels with indoor waterparks are concentrated in Wisconsin Dells, where 18 hotels with indoor waterparks now exist. The Polynesian Resort in Wisconsin Dells WI is generally credited with being the first hotel indoor waterpark in 1994. The number three ranked Bavarian Inn Lodge in Frankenmuth MI opened the first of its five indoor pools and 30,000 square feet of indoor water features in 1986 but did not install any waterslides. The answer to who was first depends upon your definition of an indoor waterpark. A waterpark resort task force is establishing definitions and standards for waterparks.

Most of the 42 other hotels with indoor waterparks are concentrated --- In Wisconsin: Green Bay, Madison, Minocqua, Lac du Flambeau, Tomah and Prairie du Chien. In Minnesota: Moorhead, Thief River Falls, Rochester, Minneapolis, Owatonna, St Cloud, Baxter, Detroit Lakes, Orr and Shoreview. In North Dakota: Minot, Bismarck. In South Dakota: Aberdeen, Watertown. In Montana: Anaconda, Missoula. In other areas: Erie PA, Casper WY, Norfolk NE, Colorado Springs CO and Anchorage AK.

Profile of USA Hotel Waterpark Resorts by Number of Rooms

Among the top five largest resorts by room count, the average number of hotel rooms is 391 with an indoor waterpark of 76,000 sf or 194 sf per guest room. These top five resorts have an average of 5.4 waterslides, 3.4 pools and 2.2 spas. Eighty percent of them have a lazy river, 33% have a wave pool and 20% have a water coaster. The top five resorts have 12,029 sf of meeting space and an average of 7.4 meeting rooms.

	Avg # Rooms	Avg Sq Ft Indoor WP	Avg # Slides	Avg # Pools	Avg # Spas	Lazy River	Wave Pool	Water Coaster	Avg Sq Ft Meeting Space	Avg # Meeting Rooms
Top 5 Largest	391	76,000	5.4	3.4	2.2	0.8	0.33	0.20	12,029	7.4
Top 10 Largest	339	58,400	6.1	3.1	2.0	0.8	0.20	0.10	8,770	6.8
Top 20 Largest	279	38,713	4.2	2.7	1.8	0.7	0.09	0.05	22,200	9.8
Top 30 Largest	238	32,312	3.6	2.4	1.5	0.6	0.05	0.03	17,182	8.5
Top 40 Largest	207	27,017	3.2	2.3	1.5	0.5	0.04	0.03	14,750	7.5

Source: Hotel Waterpark Resort Research & Consulting

Among the top ten hotel waterparks, the average number of rooms is 339 with a 58,400 sf indoor waterpark, which is 172 sf per guest room. Among the top 20 largest, the average number of rooms is 279 and the rule of thumb is 139 sf of indoor waterpark per guest room. Among the top 30 largest, the average room count is 238 and the average indoor waterpark is 32,312 sf or 135 sf per guest room. Among the top 40 largest, the average number of hotel rooms is 207 and the average indoor waterpark is 27,017 sf, --- a ratio of 131 sf per guest room. This is only one of several methods the hotel waterpark developer should use to determine the size of a proposed indoor waterpark and its components.

Profile of USA Hotel Waterpark Resorts by Size of Waterpark

Sizing the indoor waterpark and choosing the right components is a difficult task for the developer. Hotels with the highest number of guest rooms don't always have the largest waterparks, so we sliced the data another way.

Hotels with An Indoor Waterpark	Avg # Rooms	Avg Indoor Waterpark Sq Ft	Indoor Waterpark Sq Ft Per Room	Rooms per 1000 Sq Ft Of Indoor Waterpark
Over 50,000 sf	328	89,500	273	3.7
40,000 to 49,000 sf	230	42,000	183	5.5
30,000 to 39,000 sf	257	33,375	130	7.7
20,000 to 29,000 sf	221	21,554	98	10.2
10,000 to 19,000 sf	119	11,944	100	10.0
5,000 to 9,000 sf	103	6,955	68	14.8
Under \$5,000 sf	90	2,589	29	34.9

Source: Hotel Waterpark Resort Research & Consulting

A direct relationship exists between the number of hotel rooms and the size of their indoor waterparks. For example, hotels with waterparks more than 50,000 square feet average 328 rooms and 89,500 square feet of indoor waterpark --- a ratio of 273 sf of waterpark per guest room. That ratio decelerates as waterparks get smaller.

To illustrate, hotels with waterparks 40,000 to 49,000 sf average 230 rooms and 42,000 sf of indoor waterpark --- a ratio of 183 sf of waterpark per guest room. Use the chart above to help size your project.

Top 15 Hotel Meeting Facilities with Indoor Waterparks in the USA

Many of the largest hotel waterparks are also in the meetings business. However, the amount of meeting space drops off dramatically within the Top 15.

Name	Location	Rooms	Meeting Facilities Square Feet	Indoor WP Square Feet
Grand Harbor Resort	Dubuque IA	194	120,000	25,000
BW Ramkota Hotel	Sioux Falls SD	226	60,000	3,000
Timber Ridge Lodge	Lake Geneva WI	225	50,000	30,000

Hilton City Center	Milwaukee WI	730	30,000	20,000
Kalahari Resort	Wisconsin Dells WI	272	29,344	67,500
Arrowood Resort	Alexandria MN	200	28,000	21,000
Ramada Plaza	Fargo ND	185	25,000	10,000
Bavarian Inn Lodge	Frankenmuth MI	357	17,000	30,000
Marriott Depot Hotel	Minneapolis MN	132	16,000	10,000
BW Sterling Inn & CC	Sterling Heights MI	250	15,905	22,769
Ramada Inn & Waterpark	Norfolk NE	98	15,000	7,000
Hojo Resort Conference	Wisconsin Dells WI	230	15,000	13,000
Chula Vista Resort	Wisconsin Dells WI	300	14,000	30,000
Wintergreen Resort	Wisconsin Dells WI	109	12,000	15,000
Grand View Lodge	Nisswa MN	200	10,600	7,500
Source: Hotel Waterpark Resort Research & Consulting				

Other hotel waterpark resorts with more than 10,000 square feet of meeting space are located in Anaconda MT, Minot ND and Tomah WI. The other forty-three hotel waterparks in the USA tend to be designed primarily for the individual leisure traveler segment.

Profile of USA Hotel Waterpark Resorts by Size of Meeting Facilities

The Top 5 hotel meeting facilities with indoor waterparks average 255 guest rooms, 57,869 sf of meeting space, 16.8 meeting rooms and a 40,600 sf indoor waterpark with 4.8 waterslides, 2.2 pools and 1.6 spas. Of the Top 5, about 67% have a lazy river, 25% have a wave pool and 20% have a water coaster.

	Avg # Rooms	Avg SqFt Meeting Space	Avg # Meeting Rooms	Avg SqFt Indoor WP	Avg # Slides	Avg # Pools	Avg # Spas	Lazy River	Wave Pool	Water Coaster
Top 5 Largest	255	57,869	16.8	40,600	4.8	2.2	1.6	0.67	0.25	0.20
Top 10 Largest	240	39,125	14.6	29,677	3.0	2.4	1.6	0.50	0.14	0.10
Top 15 Largest	222	30,523	13.5	24,618	2.6	2.1	1.8	0.33	0.10	0.07
Source: Hotel Waterpark Resort Research & Consulting										

Among the Top 10 hotel meeting facilities with indoor waterparks, the average number of guest rooms is 240 with 39,125 sf of meeting space, 14.6 meeting rooms and a 29,677 sf indoor waterpark.

Among the Top 15 hotel meeting facilities with indoor waterparks, the average is 222 guest rooms, 30,523 sf of meeting space, 13.5 meeting rooms and a 24,618 sf indoor waterpark.

This is only one of several methods a developer should consider using to estimate the size of meeting facilities.

Hotel Waterpark Resorts Under Construction in USA

Nine (9) hotels with indoor waterparks are currently under construction in the USA:

Name	Location	Project	Rooms	Indoor Waterpark
Holiday Inn	Amana IA	Holidome conversion		8,934 sf
Mountain Grand Lodge	Boyne Falls MI	New construction	200	51,000 sf
BW Sterling Heights	Sterling Heights MI	Waterpark expansion		9,000 sf
Ramada Northwest IWP	Brooklyn Park MN	Waterpark addition		20,000 sf
Great Wolf Lodge	Poconos PA	New construction	400	50,000 sf
Great Wolf Lodge	Williamsburg VA	New construction	297	38,000 sf
Grand Victorian Resort	Sheboygan WI	New construction	247	40,000 sf
Meadowbrook Resort	Wisconsin Dells WI	Waterpark expansion		7,000 sf
Kalahari Resort	Wisconsin Dells WI	Meeting Space expansion		

Source: Hotel Waterpark Resort Research & Consulting

Boyne Mountain Ski Resort is constructing a 200-room condominium hotel called the Mountain Grand Lodge, bringing its total units to 439, along with building its 51,000 sf Avalanche Bay indoor waterpark.

Best Western Sterling Heights is expanding its 22,000 sf indoor waterpark by 9,000 sf --- bringing its total square footage to 31,000.

Kalahari Resort is under construction with an 80,000 sf addition to its 45,000 sf Convention Center. When the expansion is complete in the summer of 2004, the center will have 42 meeting rooms, 16 suites, 18 small group rooms, 14 theaters that double as meeting space, 4 company board rooms and a ballroom that measures 21,000 square feet. Kalahari Resort will be able to handle conventions with 5,500 attendees and trade shows with 300 exhibit booths.

USA Hotel Waterpark Resorts In Development

Forty-six (46) hotel indoor waterpark projects are in the planning stages as of October 2, 2003, compared with 28 projects in the pipeline this same time last year. Michigan, Wisconsin and Minnesota are leading the way in new developments. The following numbers of projects are slated for the following states:

6	Michigan	1	Connecticut
6	Wisconsin	1	California
5	Minnesota	1	Indiana
3	Iowa	1	Louisiana
3	Illinois	1	Massachusetts
3	North Dakota	1	Maryland
2	Colorado	1	New Hampshire
2	Missouri	1	Ohio
2	New York	1	Pennsylvania
2	South Dakota	1	Washington
2	Texas		

These 46 projects account for an estimated 11,400 rooms and 1.2 million square feet of indoor waterparks in the development pipeline --- although specifics are lacking on some of these projects.

Hotel Waterparks Out-Perform Regular Hotels

In a recent survey, we discovered that hotels WITH indoor waterparks performed at 26.9 points of occupancy higher than hotels WITHOUT indoor waterparks at Wisconsin Dells. The survey also revealed that hotels WITH indoor waterparks captured \$69 higher average room rates than hotels WITHOUT indoor waterparks.

Annually, the eighteen (18) hotels WITH indoor waterparks capture 85% of the total market room revenue while forty-four (44) hotels WITHOUT indoor waterparks capture only 15% of the total market room revenue.

Indoor waterparks increase hotel occupancy, increase average room rates and increase annual room revenues. Hotels with indoor waterparks extend their peak season from 100 days to 365 days. Hotels with indoor waterparks are almost filled 100% every weekend and school holiday break all year long. In the current economy, hotel owners that want more visitors are thinking cars instead of airplanes. They are shifting their gears away from far away feeder markets. Instead, they are focusing on backyard marketing within 200 miles of their hotel. The drive-to regional resorts performed much better than the fly-to resorts during 2003.

Hotel waterpark developers are focusing on new markets for new construction, while owners of existing hotels are thinking about enclosing their pools, raising their roofs to install 30 to 50 foot high structures that include waterslides, lazy river, activity pools, kiddie pools and adult spas. The indoor waterpark is a growing phenomenon that some experts think will become as common as the free continental breakfast.

Canadian Supply of Hotel Waterparks

In Canada, we have identified 99 hotel indoor waterparks that are open and operating in 2003 as compared with 82 properties last year. Most are located in the western provinces.

2003	2002	Province
38	35	Alberta
20	19	Saskatchewan
13	11	British Columbia
9	7	Manitoba
9	6	Ontario
6	2	Quebec
2	1	Prince Edward Island
2	1	Nova Scotia

Top 15 Canadian Hotel Waterparks by Number of Rooms

World Waterpark promotes itself as the largest indoor waterpark in the world. It is part of the West Edmonton Mall in Alberta, which also boasts being the largest shopping center in the world, according to the Guinness Book of World Records. The Fantasyland Hotel at West Edmonton Mall was built in 1986 with 355 rooms. It wouldn't be totally accurate to call Fantasyland Hotel a hotel waterpark, but it is closely connected. You can walk from the hotel through the mall to the 217,800 sf World Waterpark without going outside. So, the largest hotel in Canada by room count associated with an indoor waterpark is the Fantasyland Hotel. The rest of the Top 15 Hotels, ranked by number of rooms, with indoor waterparks, are as follows:

Name	Location		# Rooms	Indoor Waterpark Sq Ft
Fantasyland Hotel at West Edmonton Mall	Edmonton	AB	355	217,800
Sheraton Suites	Calgary	AB	325	4,100
Grand Okanagan Resort	Kelowna	BC	320	
Sheraton Cavalier Hotel	Calgary	AB	306	
Travelodge Hotel	Saskatoon	SK	268	4,000
Best Western Hospitality Inn	Calgary	AB	261	3,500
Sheraton Cavalier Hotel	Saskatoon	SK	249	4,400
Remai Regina Hotel & Convention Center	Regina	SK	235	4,600
Howard Johnson Inn	Canmore	AB	202	3,300
Imperial 400 Hotel	Regina	SK	199	3,600
Medicine Hat Lodge Hotel	Medicine Hat	AB	193	6,000
Landmark Inn	Regina	SK	188	3,600
Victoria Inn	Thunder Bay	ON	182	3,300
Service Plus Inn	Grand Prairie	AB	180	3,300
Imperial 400 Hotel	Saskatoon	SK	176	3,600

Source: Hotel Waterpark Resort Research & Consulting, Coy & Haralson, 507-289-7404.

In Canada, hotel waterparks are different than in the USA. Many are really indoor pools that have been enlarged and enhanced with waterslides, water playthings and geyser guns --- raising the question of what is a waterpark. Many of the indoor waterparks in Canada are under 10,000 sf while many in the USA are over 10,000 sf.

Top 15 Canadian Hotel Waterparks by Size of Waterpark

The 217,800 sf World Waterpark is not really a hotel waterpark, technically, but it is an indoor waterpark that is located in the West Edmonton Mall. And the 355-room Fantasyland Hotel is part of that same mall --- making a connection between the hotel and the waterpark.

The second-largest indoor waterpark connected to a hotel in Canada is the Ramada Hotel & Suites in Lethbridge AB with 13,000 sf of park and 119 rooms.

The third largest hotel waterpark is the Medicine Hat Lodge with 193 rooms and 6,000 sf of indoor waterpark. The size of the indoor waterpark declines rapidly in the Top 15, as shown below:

Name	Location		# Rooms	Indoor Waterpark Sq Ft
World Waterpark West Edmonton Mall	Edmonton	AB	0	217,800
Ramada Hotel & Suites	Lethbridge	AB	119	13,000
Medicine Hat Lodge Hotel	Medicine Hat	AB	193	6,000
Travelodge Hotel	Medicine Hat	AB	92	5,600
Riviera Hotel near West Edmonton Mall	Edmonton	AB		5,500
Douglas Fir Condo Resort	Banff	AB	133	5,000
Ramada Renaissance Hotel	Saskatoon	SK	144	4,800
Remai Regina Hotel & Conv Center	Regina	SK	235	4,600
Sheraton Cavalier Hotel	Saskatoon	SK	249	4,400
Sheraton Suites	Calgary	AB	325	4,100
Travelodge Hotel	Saskatoon	SK	268	4,000
Best Western Seven Oaks Inn	Regina	SK	153	3,800
Riverside Mountain Lodge	Fernie	BC		3,800
Canad Inns Transcona	Winnipeg	MB	50	3,700
Imperial 400 Hotel	Regina	SK	50	3,700

Source: Hotel Waterpark Resort Research & Consulting, Coy & Haralson, 507-289-7404.

In Canada, the largest concentration of hotel indoor waterparks is in the Economy Hotel sector, where the room counts average 69 rooms and indoor waterparks average 2,918 sf. That's a ratio of only 42 sf per guest room for determining the size of an average indoor waterpark in Canada. However, when you look at what is under construction and in the planning stages, bigger hotel waterparks are coming to Canada.

Canadian Hotel Waterpark Resorts Under Construction

The Travelodge World Hotel in Ottawa ON is adding a 13,000 sf indoor waterpark to its 177 guest rooms. Other hotel indoor waterpark projects of less than 10,000 sf are under construction in Drumheller AB, Edmonton AB, High Level AB, Fort Nelson BC, Fort St John BC, Portage La Prairie MB and Moose Jaw SK.

Name	Location		# Rooms	Indoor Waterpark Sq Ft
Best Western Jurassic Inn	Drumheller	AB	49	6,200
Wingate Inn	Edmonton	AB	120	3,500
Super 8	High Level	AB	60	2,500
Super 8 WP Addition	Fort Nelson	BC		2,500
Super 8	Fort St John	BC		2,500
Canad Inns Portage La Prairie	Portage La Prairie	MB		
Travelodge World Hotel WP Addition	Ottawa	ON	177	13,000
Days Inn	Moose Jaw	SK		3,000

Source: Hotel Waterpark Resort Research & Consulting, Coy & Haralson, 507-289-7404.

Canadian Hotel Waterpark Resorts In Development

Four major hotel waterpark resorts in the planning stages are targeted for the Niagara Falls ON market. The Great Wolf Lodge will likely be the first to break ground in 2004.

Name	Location		# Rooms	Indoor Waterpark Sq Ft
Amerihost	Grand Prairie	AB		3,200
Amerihost	Airdrie	AB		3,000
Travelodge	Strathmore	AB		2,800
Super 8	Castlegar	BC		3,500
Super 8	Caraquet	NB		3,300
Super 8	Truro	NS		3,300
Ameri-Cana Resort	Niagara Falls	ON	160	25,000
Great Wolf Lodge	Niagara Falls	ON	398	50,000
Proposed Hotel Indoor Waterpark	Niagara Falls	ON	180	28,000
Proposed Hotel Indoor Waterpark	Niagara Falls	ON	180	28,000
Holiday Inn	Regina	SK		3,000

Source: Hotel Waterpark Resort Research & Consulting, Coy & Haralson, 507-289-7404

Mexican Supply of Hotel Waterparks

We have identified eleven (11) properties in Mexico that have a combination of hotel rooms, indoor waterparks and outdoor waterparks. We are in the process of surveying owners and managers to develop a profile of hotel waterpark resorts in Mexico.

Name	Location	
Hotel Balneario de Lourdes	Sta Maria SLP	Mexico
Hotel Balneario Spa La Caldera	Abasolo GTO	Mexico
CICI Acapulco Magico Waterpark	Acapulco	Mexico
Wet n Wild	Cancun	Mexico
Splash Hotel Parque Acuatico Nayrit	Mexico City	Mexico
Balneario Ixtapan Waterpark	Mexico City	Mexico
Persaventura Waterpark	Piedras Negras COA	Mexico
Balneario San Jose Waterpark	Quiroga MICH	Mexico
Balneario El Rollo	Morelos	Mexico
Tangamanga Splash	San Luis Potosi	Mexico
Parque Acuatico El Rollo	Tlaquiltenango	Mexico

Source: Hotel Waterpark Resort Research & Consulting, Coy & Haralson, 507-289-7404.

Rest of the World Supply of Hotel Waterparks

We have identified thirteen (13) properties in the rest of the world that have a combination of hotel rooms, indoor waterparks and outdoor waterparks.

We continue to survey owners and managers to build a profile of hotel waterpark resorts around the world.

Name	Location		# Rooms	Indoor Waterpark Sq Ft
Jumeirah Beach Resort & Aquapark	Dubai	UAE	619	
Hotel El Paso & Costa Caribe WP	Port Aventura	Spain	500	
Hotel Aventura & Costa Caribe WP	Port Aventura	Spain	500	
Esperos Palace Hotel & Waterpark	Faliraki Rhodes	Greece	416	
Dedeman Hotel & Aquapark	Istanbul	Turkey	346	
Alton Towers/Splash Landing	Staffordshire	UK	216	40,000
Amipura Resort & Shanku's OWP	Gujaret	India	81	
Seagaia Phx Resort's Ocean Dome IWP	Miyazaki City	Japan	0	322,752
Bergische Sonne Indoor Outdoor WP	Wuppertal Ruhr Dist	Germany		430,560
Monte Mare Adventure Spa I&OWP	Rheinback	Germany		269,100
Alpamare	Pfaeffikon	Switzerland		25,000
De Koploper Sportscenter	Lelystad	Netherlands		8,850
Basingstoke Indoor Waterpark	Basingstoke	UK		1,100
Source: Hotel Waterpark Resort Research & Consulting, Coy & Haralson, 507-289-7404.				

Although World Waterpark in West Edmonton, Alberta, Canada claims to be the largest indoor waterpark in the world with 217,800 sf, there are three larger properties in Japan and Germany.

Ocean Dome in Miyazaki City Japan is the largest indoor waterpark in the world. It has underground caves, restaurants, entertainment and a wave-making system. It measures one football field wide by three football fields long. It has a retractable roof that opens to 193,752 sf or 60% of its full capacity. Ocean Dome is able to accommodate 10,000 people at the same time. It is certified to be the World's Largest All Weather Indoor Waterpark by the Guinness Book of Records.

Bergische Sonne has a 430,560 sf indoor-outdoor waterpark in Wuppertal Ruh Germany.

Monte Mare Adventure Spa has 269,100 sf indoor-outdoor waterpark in Rheinback Germany.

Some are claiming that Alton Towers/Splash Landing in Staffordshire England is the first hotel waterpark resort in Europe with its 216 rooms and 40,000 sf indoor waterpark.

Rest of the World Hotel/Indoor Waterparks In Development

Name	Location	
Waterpark Wodny Indoor Waterpark	Lodz	Poland
Waterpark Wodny Indoor Waterpark	Warschau	Poland
Suzanne Mela's Indoor Waterpark	Berlin-Postdam	Germany
Ogmio Astra Pramogu Centras Indoor Waterpark	Vilnius	Lithuania
Source: Hotel Waterpark Resort Research & Consulting, Coy & Haralson, 507-289-7404.		

Worldwide, the hotel waterpark resort concept is growing in popularity with developers and leisure travelers.

No doubt, the projects will get bigger, and the claims to fame will intensify.

Hotel Waterpark Resort Research & Consulting is a collaboration of Jeff Coy & Bill Haralson. Coy is certified by the International Society of Hospitality Consultants. Haralson is a Hall of Fame member of the World Waterpark Association. For more info, contact Jeff at 507-289-7404 or email jeffcoy@aol.com. Website is www.jeffcoy.com. Reach Bill at 972-231-7444 or email wharalson@aol.com.