

Premium Scream Night

Topline Report of Survey Findings

September 13, 2024



Strategy & Insights

BACKGROUND, OBJECTIVES & METHODOLOGY

■ **Background.** UOR hosted Premium Scream Night (PSN) on August 29th, 2024. PSN is a new, one-night-only ticketed Halloween Horror Nights (HHN) event at a premium price point, \$350 plus tax. Key event entitlements include lower overall capacity (capped at 7,000 guests), pulsing by party for Houses, unlimited full-size food and beverage (select items only; non-alcoholic only), being the first to experience HHN, and access to select rides.

■ **Research Objectives.** The goals of the research were as follows:

1. Evaluate and compare the guest experience at PSN with regular HHN night experience
2. Understand whether PSN represents an incremental visit, cannibalizes other HHN products, or shifts guest behavior; and
3. Understand which PSN features drive purchase behavior.

■ **Methodology.** Consumer Insights invited participants to take an online event-focused survey, which was completed between August 30th and September 3rd. To qualify for the survey, guests had to be at least 18 years old and to have attended the event. Emails were pulled from the sale records of the online ticket store. In total, 3,250 guests attended PSN, of which 1,400 were invited to complete the survey. We received and analyzed 501 complete surveys.

EXECUTIVE SUMMARY

Nine in ten respondents (90%) rated their overall Premium Scream Night experience as “Excellent” (cf. 30% for regular HHN week 1), specifically citing shorter wait times, less crowding, complimentary food and staggered entry into Houses as top reasons for their rating. Smaller entitlements, like the souvenir lanyard and free parking, were sporadically called out as “cherry on top” elements. While “being first to experience” was not called out qualitatively or quantitatively, many respondents nevertheless preferred PSN’s current timing at the beginning of the HHN season.

Other Key Performance Metrics were similarly high, with 3 in 4 respondents rating PSN’s value as “Excellent”, and 9 in 10 respondents intending to revisit PSN. The cumulative effect of capped attendance was reflected across increased House penetration (nearly 100% penetration across all houses; many Houses visited multiple times), increased Food/Beverage penetration, shorter wait times throughout, better pacing within Houses and “intimate” interactions with Scareactors. Many guests report a more relaxed experience, with opportunities to take breaks, eat, and shop without fear of missing out on Houses, Zones and Shows.

PSN was able to attract guests (17% of respondents) who were not otherwise planning to attend HHN this year. 29% of respondents replaced their regular HHN visit this year for a PSN visit, with the majority of these guests indicating that they would have purchased an express pass during their visit. Many respondents made favorable comparisons between PSN and other premium HHN products, and some expressed that they would consider PSN over R.I.P. Tours and Express Passes in the future.

DETAILED SUMMARY

■ *Key performance metrics.* A full 90% of respondents rated Overall Experience as “excellent”, a marked improvement from an observed historical average among regular HHN guests (week 1 2024: 30%¹; 2023 Total: 34%), Express Pass guests (week 1 2024: 42%) and R.I.P. Tour guests (week 1 2024: 74%; 2023 Total: 74%)².

Key Performance Metrics	HHN First Timer	Previous HHN Experience			Total PSN	HHN week 1 2024
		GA Ticket	Express Pass	R.I.P. Tour		
Overall Experience*	84%	91%	91%	91%	90%	30%
NPS	84	95	95	95	94	25
Value*	52%	68%	78%	81%	75%	22%
Comparison to Expectations^	76%	78%	87%	90%	84%	14%
Intent to Revisit†	76%	87%	91%	86%	89%	52%
BASE	25	134	285	57	501	1,068

Notes: *Top Box = "Excellent"; ^Top Box = "Much better than I expected"; †Top Box = "Very likely"; Sample for HHN First Timers is extremely low. We do not recommend making strong inferences off of this sample.

As a new event, respondents may have brought different expectations for PSN based on their experience or inexperience with HHN in general, or with premium HHN products (Express Pass and R.I.P. Tour) specifically. Overall, first timers exhibit depressed (yet still high) scores across all Key Performance metrics, noting that sample size for this population is extremely low. On the other hand, guests with previous HHN experience exhibited higher scores across these metrics, with R.I.P. Tour guests and Express Pass guests often drawing favorable comparisons between PSN and those premium products (see §Incrementality and Cannibalization for more details):

“Greatest HHN event ever and we do private tours each year”

“I have done RIP tours and express passes and this was the best so far.”

“I have come to HHN for a really long time and never experienced the event the way I did on the premium night. I have done RIP several times and premium night surpassed those experiences by a longshot.”

Unaided, respondents faithfully mentioned PSN’s key messaging platforms when explaining their overall “excellent” rating of the event. To wit, respondents specifically cited shorter wait times, low crowding, complimentary food and beverages, and staggered entry to Houses as contributing to their “excellent” experience:

*“It was a fantastic experience all around. The **low crowd size** and **staggered house** entry made it **so worth it!**”*

*“Amazing. It was honestly **a VIP experience**.[...]. **No waits. Free food and drinks.** The houses were better because we could take our time **weren’t rushed because of puls[ing]**.. I would pay literally any amount to experience that again. Me and my wife agree it was the best theme park experience we’ve had in our entire life. **The second tickets go on sale next year we’re buying.**”*

What’s more, respondents additionally cited their experience with Team Members (inclusive of scareactors and other staff), many emphasizing TMs’ increased attention, enthusiasm, and friendliness:

*“I’ve gone to Halloween Horror Nights for two decades and this was the **friendliest everyone on the staff has ever been.**”*

*“Loved the **intimate moments with scare actors** in houses and zones”*

*“The houses were terrifying; the scare zones were so well done. Better than that, the **team members looked THRILLED!!** They were just as excited as everyone else around them”*

¹ Source: Weekly HHN GSAT, event week 1 / week ending 2024-09-01

² Source: HHN UO LBA 2023

Top 5 topics by mentions (“excellent” ratings)

Topic	% mentions
Wait times	46%
Crowds	41%
Complimentary food	22%
Pulsing	21%
TM experience	16%
BASE	501

■ *Crowding, pulsing, penetration, and downstream effects.* The capped attendance had several anticipated (measured) and unanticipated (unmeasured) downstream effects, from improved crowding and wait time metrics to guests reporting feeling relaxed and stress free: With fewer attendees, wait times for Houses and food/beverages were perceived to be shorter and rated higher by PSN guests over regular HHN guests.

Crowding and wait times	PSN	HHN week 1 2024
Not at all crowded*	74%	<1%
Overall wait times for Houses^	96%	11%
Overall wait times for food / drink venues^	63%	15%
BASE	501	1,068

Note: * perc. “Not crowded at all”; ^ perc. “Excellent”

Respondents nearly universally identified these specific reasons for their “Excellent” overall event rating, topping the list of all potential reasons and well above the average of all reasons:

Crowding and wait times contribute to overall “Excellent” rating	PSN	HHN week 1 2024
Crowd Level	99%	23%
Wait Times / Lines	98%	31%
Houses	90%	92%
Food & Dining	85%	39%
BASE (respondents giving “Excellent” overall rating)	453	840

House- and Food and Beverage-penetration topped out (98% average penetration across all Houses; 98% and 85% of respondents experienced Food and non-alcoholic beverages, respectively), with several guests reporting that they were able to experience Houses multiple times.

	PSN	HHN week 1 2024
Average House penetration	9.72	5.64
Average Zone Penetration	4.75	4.13

Historically, higher overall experience ratings positively correlate with the number of event elements (Houses, Scare Zones, food and beverage etc.) a guest experience, which fact is reflected here again. However, given that PSN guests’ overall rating is nearly double that of HHN guests who visited all 10 Houses, other aspects of PSN must also contribute.

Overall Experience Rating x Number of Houses Visited (10)	PSN	HHN week 1 2024
% “Excellent” rating	91%	44%
BASE (respondents visiting all 10 Houses)	446	109

"It was better [than] I expected. I was able to visit all the haunted houses plus go through 3 of them a second time."

*"The wait times for the houses was wonderful between 5-20 minutes.. from the time we were let in, I was able to **do all the houses by 10pm**, and that was with stopping to eat a few times along the way. I was able to go back and **reenter the houses I really loved multiple times**, that was neat."*

*"being able to **complete the houses multiple times** while being pulsed through with just my party was an incredible experience and worth the steep price"*

Pulsing was an integral part of guest satisfaction, enabling guests to experience more scares and uncover secrets / observe details otherwise missed:

*"I was able to get **all the intended scares in a house in 1 or 2 walkthroughs** which usually takes 3 to 4 walkthroughs. I was able to take my time in the houses and **discover secrets which I only find out during Unmasking Tours.**"*

*"The houses not being packed allowed us to look around and **enjoy all the details inside the houses** and once again **not pressured** by people behind us to keep the flow moving."*

Less crowding in Houses, Scare Zones, and in general also led to several intangible benefits: Guests indicated feeling more relaxed and appreciated the ability to not have to make tradeoffs between seeing houses and eating food (or other activities).

*"We have gone for 10 years and have done [...] fast pass, and the frequent fear pass **and this was by far the most relaxing time we have ever had**"*

*"The ability to go through every house, see the show, ride the rides, get food and drinks, and **be able to truly RELAX really made the experience worth it.**"*



*"I'm extremely happy with the experience especially because the park was not full and we were able to walk without crowds and enjoy everything **without the pressure of not being able to complete everything.**"*

*"I've never gotten the chance to try the food at HHN in the past because the lines are so long and **it forces you to choose between food or a house even with express.**"*

■ **Houses and Scare Zones.** In the absence of the notorious "conga line", House ratings for PSN were on average 33% higher than HHN (week 1 2024). Another read on "pulsing", PSN enjoyed a 58% higher rating on "Pacing / guest flow through the houses" than HHN week 1 2024.

HOUSES	PSN	HHN week 1 2024	PSN – 2024s
Pacing / guest flow through the houses	84%	26%	58%
Unexpected/surprising moments within houses	77%	43%	34%
Number of scareactors in the houses	73%	39%	33%
Variety of houses featured	85%	52%	32%
Scareactor engagement within houses	86%	55%	31%
Overall quality of houses	83%	54%	29%
Immersiveness of houses	85%	57%	28%
Use of special effects within houses	84%	57%	27%
Creativity of houses	82%	57%	25%
BASE (respondents visiting at least one House)	499	1,020	-

Scores are similarly higher across Scare Zone metrics. Across both Houses and Scare Zones, ratings for scareactor engagement are up by over 30% comparing PSN to HHN week 1 2024, in line with respondent feelings of intimacy:

*“So many **individualized experiences in the scare zones and houses** due to the low crowds. The staff all seemed to be having a great time”*

*“The scare zones were **so interactive** because they weren’t over crowded. We got to interact with the death eaters.”*

ZONES	PSN	HHN week 1 2024	PSN – 2024
Number of scareactors in the scare zones	68%	33%	35%
Scareactor engagement within scare zones	79%	45%	34%
Variety of scare zones featured	61%	32%	29%
Unexpected/surprising moments within scare zones	51%	22%	29%
Overall quality of scare zones	58%	30%	28%
Immersiveness of scare zones	57%	29%	28%
Use of special effects within scare zones	55%	29%	26%
Creativity of scare zones	59%	34%	25%
BASE (respondents visiting at least one scare zone)	501	1011	-

■ **Food and Beverage.** Food was a highly anticipated element of PSN and was mentioned in most open-ended responses, both positive and negative (296/501, 60%; search term[s]: “food”). Overall food and beverage ratings are higher for PSN than in this year’s 1st week GSAT.

Food and Beverage	PSN	HHN week 1 2024
Overall rating	63%	31%
Variety of food	68%	-
Temperature of food	66%	-
Taste / quality of the food	47%	-
Amount of food	87%	-
BASE (% “Excellent”)	491	813
Overall rating – Non-alcoholic beverages*	70%*	38%**
Overall rating – Alcoholic beverages^	62%^	31%††
Variety of beverages†	68%†	-
BASE (% “Excellent”)	See note	See note

Notes:; * base: 424; ^ base: 286; † base: 475; ** base: 443; ††base: 522

However, few respondent comments speak directly to these ratings. Instead, most positive comments read “amazing food” (or similar), simply indicated that the food was complimentary, or vaguely referenced the variety or novelty of food items:

*“Got to [...] **try a lot of food** that [we] normally wouldn’t”*

*“We tried **so many snacks and meal type foods.**”*

*“The food selection was **terrific.**”*

*“The **included food and drink was the main factor** when deciding to spend the money on the tickets. If the price stays the same and the food and drinks are included we would definitely buy again next year.”*

Conversely, most negative feedback concerned lack of availability (with some food items reportedly running out as early as 8pm) and the sporadic locations of food kiosks:

*"I was slightly upset that **most of the food booths ran out of food, before 8pm**. Since it was such a high price point ticket, and limited attendance I was disappointed that I wasn't able to experience all the food options..."*

*"The **free food locations were basically hidden**, but Universal still ran out of food."*

Some guests opined that the communication of food options (generally, and diet-specific) was lacking, while others added that it was unclear what "select [...] food items" entailed in the event's promotion:

*"My biggest feedback is that [it] was not a clearly laid out food plan. **It said select but everything was available but that was not clear.**"*

*"We went in completely blind and noticed **that all of the food stands had full price lists, so we assumed it was not included**. We passed up tons of food items thinking we'd have to go to a specific spot for the "select included" items, similar to an RIP tour. It wasn't until later in the night when we were told by a team member that everything was included—we just had to walk up to the booth and order. I wasn't even sure if all of the food would be available for purchase, let alone included because Universal completely dropped the ball in communicating the inclusions."*

*"**Very few options for vegan, vegetarian and pescatarians**. I emailed prior to the event and was advised that there would be options but during the event, there weren't vegan burgers - only beef burgers."*

■ **Event entitlements.** In a constant sum exercise, respondents distributed 100 points across the six main features of PSN, revealing both how features are ranked and the relative magnitude of importance. Congruent with the frequency of mentions in the open-ended responses, shorter wait times was on average the most important characteristic of PSN, receiving nearly twice the number of points as pulsing and complimentary food and beverage. While not being the most important purchase drivers, these latter two entitlements both positively impacted guest experience (see §*Crowding, pulsing, penetration, and downstream effects* and §*Food and Beverage*).

Entitlements	Mean (pts)
Shorter wait times for haunted houses	40
Staggered entry to haunted houses	24
All-you-care-to-enjoy food and non-alcoholic beverages	21
Access to scare zones and live entertainment events	8
Souvenir credential and lanyard	4
Free self-parking	3
TOTAL	100
BASE	501

Similarly, although free self-parking ranked last in this exercise, it was occasionally mentioned as a "nice touch" in the open-ended responses. And, while the souvenir credential and lanyard were not high ranked, there appears to be some, if rare, hunger for PSN-themed merchandise:

*"Loved that **parking, food, and NA beverages were included**."*

*"The free food, **free parking**, and free non-alcoholic drinks put the proverbial **cherry on top of the whole thing**."*



*"The lanyard and credential was a **nice touch**."*

*"The experience for the price was not there (**more than a lanyard would have been nice**) ... [I would have liked] **a free t shirt just for the night**."*

*"**No merchandise available celebrating premium nite**. You could have had pin or t shirts or something more than just a plastic tag attached to a HHN Lanyard."*

When asked to weigh wait times and staggered entry against being the first to experience HHN, respondents overwhelmingly chose the former: On a scale from 1 ('being 1st to experience HHN') to 7 ('shorter wait times and pulsing'), the average respondent chose 6.

However, the current timing of PSN—i.e., at the beginning of the HHN season—was vastly preferred to other potential timings, suggesting that being first to experience HHN is still a motivating factor, as some respondents write:

*“It was incredible to get to go to all of the houses with such a short wait, **to go before opening night**, and to have the park so empty”*

*“Minimal wait times for all houses, **a chance to be one of the first to see all of HHN**, and free food!”*

*“Got to experience the full cast of HHN **prior to the main public.**”*

PSN timing	%
At the beginning of HHN	76%
Early September	29%
Mid/Late September	35%
Early October	41%
Mid/Late October	34%
Early November	25%
None	<1%
BASE:	501

Note: Q: Which timeframe(s) would you be interested in experiencing Premium Scream Night? Select all that apply.

■ *Incrementality and Cannibalization.*

Incrementality	Cannibalization	Planning to visit HHN this year
17%	29%	54%
would not have visited HHN at all	Visited PSN instead of HHN this year	
BASE: 501		

Approximately 17% of respondents visited PSN who would not have visited HHN this year, many citing the draw of lower wait times, lesser crowds, and other marketed entitlements.

*“Premium scream night convinced me to finally experience HHN for the first time! I was drawn in by the **low capacity** aspect of this event. But once the event began, the complimentary food and more one on one feeling of being scared made the event that much more unique and exciting to be a part of” – first timer*

*“It was my first ever HHN and it was an unreal way to experience it. I loved it because there was **a lot less stress than i anticipated** getting through lines and planning to hit everything! I felt calm and relaxed and enjoyed all of it and had enough time to enjoy things that were extra.” – first timer*

Conversely, within this mix are previous HHN guests who cite unacceptable crowding and wait times (and the cost of Express Passes and R.I.P. Tours) as reasons for not attending regular HHN:

“Unfortunately due to the cost of attendance (we figure we need express or RIP to make sure we can get through everything in one night) we haven’t been able to come back since. This event gave us the opportunity to return before we would’ve been able to otherwise”

“We have gone to HHN for almost 30 years and were ready to give up and not go anymore because it was so overly crowded and the wait times were terrible even with the express pass... [PSN] was the most enjoyable night we have had in years at HHN. We will definitely do this next year so please offer it again!”

“Last year we went a few times in September for the first time since 2019, and were just overwhelmed and stressed most of each visit. And we still missed 4 houses last year even with multiple visits because the crowds and wait times were a lot. After being away so long we were disappointed and said we wouldn’t be doing it this year, but I’m so glad this [premium] scream night was made an option and I’m so glad I splurged on this event because it was amazing.”

Concerning cannibalization, 29% of respondents indicated that they attended PSN instead of HHN this year. Of all respondents, 19% indicated that they would have likely bought a single night ticket with an express pass.

Product (Cannibalization)	%Total	% Among Cannibalized guests
Single Night + RIP	2%	8%
Single Night + Express	19%	71%
Single Night + No Extra	3%	10%
Fear Pass + RIP	0%	0%
Fear Pass + Express	1%	5%
Fear Pass + No Extra	2%	6%
<i>Non-Cannibalized Respondents</i>	<i>73%</i>	<i>--</i>
BASE	501	133

With respect to timing, these respondents indicated that they were most likely to have attended HHN in September:

Timing (Cannibalization)	% Among Cannibalized guests
Late August	10%
Early September	21%
Mid/Late September	29%
Early October	18%
Mid/Late October	17%
Early November	5%
BASE	133

In addition, many guests made comparisons between the R.I.P. Tour, Express passes and PSN or indicated their intent to choose PSN over these products in their commentary:

“I’ve done the RIP tour the past two years and would choose the [premium] scream night over that.”

“This is the best HHN experience I’ve ever had. I’ve done the RIP tour the past two years and would choose the preview scream night over that.”

“Best HHN experience I’ve ever had. Using RIP used to be my gold standard, but not anymore.”

“Hands down best HHN event I have been to!!!!!! Far surpassed experiences doing the RIP tour. We have been going to HHN for 3 years and have done the RIP tour every year... I liked being able to leisurely do everything on my own time versus being on the RIP tour guides terms.”

At the same time, intent to visit HHN in 2025 among PSN respondents was higher than respondents pulled from week 1 of HHN, painting a more nuanced picture.

	Intent to visit PSN in 2025	Intent to visit regular HHN in 2025	
	PSN respondents	HHN week 1 respondents	PSN respondents
Definitely will attend	89%	51%	67%
Probably will attend	7%	22%	22%
Might or might not attend	2%	16%	11%
Probably will not attend	1%	7%	1%
Definitely will not attend	<1%	4%	<1%
BASE	501	1,068	501

Of respondents not returning to HHN again this year and those who are not sure yet, around 70% indicated that the regular event is too crowded and has unacceptable wait times. Around half also mentioned that they experienced everything they wanted to experience at HHN already through the PSN event. Viewed another way, PSN filled a need by offering an experience for the major detractors of a regular HHN visit.

Reasons for not attending HHN later in 2024	%
Too crowded	72%
Wait times	67%
Experienced it all already	44%
Doesn't fit my schedule	20%
Not worth the price	15%
Other	12%
BASE (respondents not returning to HHN this year)	233

"I have never experienced what I did the other night. I am now spoiled lol. Going in on the public first night was tough after that."

"I was able to appreciate every detail, without crowds, without chaos, it's everything a fan dreams of. I felt like a special guest. Please, I beg you, keep the event for next year. After this experience, I don't see any point in going on regular days. I'll pay whatever it takes to have another experience like this."

"Been going to HHN for years, this is the first time i left the event unable to stop thinking about it and talk to everyone about it. By comparison i attended the regular event the following sunday and it was disgusting in comparison."

RESPONDENT PROFILE

PSN and HHN drew roughly equal proportions of guests from Orlando, Florida and beyond. However, PSN drew more self-described and behaviorally hard-core/ardent and dedicated/solid fans than HHN. 70% of PSN attendees have purchased premium HHN products (Express Pass and R.I.P. Tours), suggesting this group's comfort with paying more for a premium experience. To note: Respondent profiles for regular HHN attendees will vary over the course of the event. Historically, first week HHN guests tend to be more avid fans.

■ Origin

Origin	PSN	HHN week 1	2023 total
Orlando	36%	50%	32%
Florida	33%	27%	28%
Outer U.S.	29%	18%	30%
International	3%	4%	9%
TOTAL	501	1,068	10,457

■ Fandom

Fan type	PSN	HHN week 1	2023 Total
Hardcore fan	37%	29%	18%
Dedicated fan	49%	47%	46%
Casual fan	14%	21%	29%
Indifferent	<1%	1%	4%
Not a fan	<1%	1%	2%
BASE	501	1,068	10,457

Notes: Q: How much of a fan are you of Halloween Horror Nights?

Fan Type (Derived)	PSN	HHN week 1	2023 Total
Ardent Fans (8+ years)	36%	26%	17%
Solid Fans (3-7 years)	42%	38%	29%
New Fans (1-2 years)	17%	18%	25%
First Timers	5%	18%	29%
BASE	501	1,068	10,457

Notes: (Derived metric) Number of years respondents have attended HHN, bucketed into "Fan type".

■ Premium HHN product experience

Premium Product	PSN	HHN week 1	2023 Total
R.I.P. Tour	12%	-	-
Express Pass	58%	-	-
None	31%	-	-
BASE	501	-	-

Note: Percent of respondents who have bought premium HHN products in most recent year of attendance (2023 and earlier).

■ Annual Pass membership

Annual Pass	PSN	HHN week 1	2023 Total	Annual Pass (Group)	PSN	HHN week 1	2023 Total
Premier AP	28%	18%	17%	AP	49%	54%	40%
Preferred AP	16%	30%	18%				
Power AP	3%	3%	2%				
Seasonal AP	3%	4%	3%				
Not AP	51%	46%	60%	No AP	51%	46%	60%
BASE	501	1,068	10,457	TOTAL	501	1,068	10,457