

Halloween Horror Nights 2024 - Softness

Topline Report of Survey Findings

December 20, 2024



Strategy & Insights

BACKGROUND, OBJECTIVES & METHODOLOGY

■ **Background.** Attendance at and ticket sales for HHN 2024 at UOR is softer than in previous years. In particular, sales of single-night tickets are down 16% from last year. Further, the *share* of Fear passholders is higher this year, and the number of visits per Fear passholder is greater than last year. As such, the softness stems from a diminishing number of *unique* visitors. At USH attendance increased in total, but also decreased on a *nightly* basis.

<i>Ticket Sales (UOR)</i>	2023	2024	Var (% Var)
Single Night Tickets*	[redacted]		
Multi-night Tickets (Fear Products)			
*includes Premium Scream Night			

<i>Attendance per visit (UOR)</i>	2023	2024	Var
Rush of Fear	[redacted]		
Frequent Fear			
Fear Plus			
Ultimate			
Totals			

■ **Research Objectives:**

- Understand why guests did not attend HHN 2024 at UOR, or—more generally—understand what barriers guests weigh when considering attending HHN at either park
- Understand what remediations could be implemented to attract guests in the future. / What would it take to revisit HHN next year?

■ **Methodology.** Consumer Insights invited participants to take an online survey, completed between November 7th and November 12th. To qualify for the survey, guests had to be at least 18 years old and to have attended Halloween Horror Nights in 2023 or 2022, but *not* in 2024. Emails were pulled from Snowflake. In total, 79,770 guests were invited to complete the survey. We received and analyzed 1,274 complete surveys, 708 from UOR and 566 from USH.

In addition to reporting aggregate per-Park scores, we group respondents into two distinct categories based on their proximity to the Parks and whether they are repeat HHN attendees. These groups are called out where relevant.

- *Origin:* Florida (FL) or California (CA), Out of state (OUS), or International (Intl)
- *Repeater:* 1 previous visit, 2 previous visits, 3 or more previous visits

■ **How to read:**

- Blue bullets (■) represent main takeaways from each topic and can be read independently of the supporting text/tables that follow them.

EXECUTIVE SUMMARY

Unsurprisingly, cost-related reasons were principal contributors to HHN's softness in 2024 across both Parks. Specifically, participants listed *price* and *budgetary* reasons as their top concerns, with many noting that the cost of Express Passes is especially onerous. To this latter point, as most of the respondents used single-night tickets on their last visit, many view the Express Pass as a necessary purchase given low House penetration and overall diminished experience without it. Relatedly, participants also cited long wait times and crowding as leading concerns across multiple exercises in the survey, with some questioning the overall value of the event (a la *Why spend all this money just to wait in line?*) Participants identified lines, crowds, and cost as necessary targets for improvement to earn their visit in 2025 above all other mitigations tested, with strong preferences for capping attendance, reducing the price of Express Passes and Single Night tickets, and pulsing parties into Houses. Of note, in all relevant exercises, USH respondents identified price and crowding/lines barriers significantly more than their UOR counterparts.

Taken together, the patterns above suggest that respondents seek more bang for their buck: While all indicate that the event is expensive, many concede that the event is worth the price if (a) less of their time at the event is spent in line or "packed like sardines" (USH respondent) and (b) they have more time to enjoy the themes, experiences and scares. Indeed, the most frequently selected mitigations speak to this experience: Capped attendance leads to shorter wait times for Houses and enables pulsing. The Express Pass itself also enables guests to experience more at HHN or, more generally, not wait in lines as long—lowering its price makes shorter lines more accessible for more people. While respondents' choices suggest a strong preference to lessen lines or obviate them altogether, about 1 in 5 suggested *improved queue management* and *entertainment in queues* as ways to lessen the pain of a necessary evil.

By contrast, content-related issues were not top contributors to softness. While a percentage of respondents, mostly HHN veterans and USH respondents, agree that content could be improved (specifically the IPs selected and inclusion of fresh content), few that we could identify specifically list content as a primary driver of their decision not to attend. Instead, respondents seemed to weigh content against price. Similarly, other potential barriers—competing events, marketing awareness and word of mouth, poor weather, and deferred attendance—were less important to respondents' decision making.

Quick hits:

- [Price & Guest Experience](#)*: As the top barrier, respondents strongly weighed the price of attendance, including attendant costs (airfare, hotel stays, and especially event add-ons), against concerns impacting guest experience like long wait times and heavy crowding.
- [Content](#): Content generally did not pose a significant barrier to attendance. Specific populations—USH respondents and HHN fans (3+ visits)—were more likely to call out the repetitiveness of the event and disinterest in IPs. But, when forced to make tradeoffs about how to improve their HHN experience, content-related mitigations were lower on the list than those related to price and guest experience.
- [Competitor events](#): Respondents did not visit major competitors in large numbers, favoring local, small-scale Halloween events this year. USH experiences higher competition among major area competitors, especially Knott's Scary Farm, which 19% of respondents visited in lieu of HHN.
- [Marketing awareness](#): Nearly all respondents reported seeing or hearing at least one official or unofficial advertisement for HHN. A vast majority reported advertising as having a positive influence or no influence at all on their decision not to visit. Among negative influences, respondents reported seeing/hearing about lines and crowds, and likely made their decision not to attend based, again, on these latter issues.
- [Teenagers](#): Respondents noted hearing about unruly behavior in small numbers. A tinier fraction reported that teen behavior actively influenced their decision not to attend.
- [Deferred attendance](#): Respondents largely did not defer their visit to HHN to account for Epic's opening. International respondents were more likely to defer than domestic ones.
- [Demographics & Profiling](#)
- [APPENDIX](#)

*All links internal to this document

OVERVIEW

■ *HHN Consideration: Most respondents (69%) considered attending HHN 2024. Half of respondents (51%) are unsure whether they will attend next year, with a further 21% leaning towards attending.*

Nearly 7 in 10 (69%) respondents indicated that they considered attending Halloween Horror Nights this year. Respondents who live closer to the Parks (Local and FL/CA) were significantly more likely to have considered attending, as well as respondents who are veteran attendees, i.e., have visited more than 3 times before.¹ When asked about their plans to attend HHN next year, only 21% indicated that they would probably or definitely attend (T2B) irrespective of how the data are cut. The lion's share of respondents (51%) did not commit either way. By contrast, newer HHN attendees (1-2 visits) and non-local respondents were significantly more likely to report no plans for returning to HHN. Combined, that respondents largely did consider attending HHN this year and most have not decided their plans for next year suggests that specific interventions (see *Price & Guest experience*), communicated effectively, may increase attendance.

■ *Barriers to attendance: Comparing across several high-level domains, price and budgetary concerns are top barriers to attendance, generally, with specific barriers existing for different populations: In particular, respondents who had no intention of attending HHN cited long lines and crowds (via Negative experience and Marketing). HHN Content was not as big of a concern.*

To capture a bird's eye view of what barriers exist against attending Halloween Horror Nights, we asked participants to select among eight broad reasons for not attending (See **Tab. Barriers** below). The price of the event and budgetary concerns are top barriers to HHN attendance across populations and cuts, but this appears especially true for respondents local to the Parks or within the same state (for both UOR and USH). Additionally:

- International and OUS respondents were significantly more likely to report deferring their visit to include Epic Universe in 2025 as attendant costs (travel/hotel purchase, scheduling) are greater for these guests.
- Respondents visiting HHN 3 or more times identified *Content* significantly more frequently as a barrier to attendance than respondents with only one or two years of attendance.
- Respondents who indicated no intention to visit HHN this year were significantly more likely to select *Negative experience*. Upon investigation, *Negative experience* tracks with experiences/perceptions of long lines and heavy crowding.

<i>Barriers to attendance</i>	UOR	USH
Price	42%	52%
<i>The cost this year was too high or was not a good value</i>		
Budget	42%	39%
<i>HHN was not in my budget this year</i>		
Negative experience	15%	22%
<i>I have previously had a negative experience at HHN</i>		
HHN Content	21%	23%
<i>The HHN content this year did not appeal to me</i>		
Marketing	7%	10%
<i>HHN wasn't on my radar this year</i>		
Competing events	8%	18%
<i>I was more interested in other Halloween events</i>		
Deferred visitation	19%	5%
<i>I plan to visit UOR/HHN when Epic Universe opens in 2025</i>		
Weather	9%	1%
<i>Weather events like excessive heat, flooding or hurricanes turned me off from attending</i>		
None	11%	9%

Tab. Barriers: (USH, UOR) Percentage of respondents selecting each barrier. Base: UOR = 708, USH = 566. Q: Please select which of these reasons influenced your decision not to visit. Select all that apply.

¹ To note, there is a large overlap between Local respondents and Veteran respondents, with 72% of veteran event goers living in the greater Hollywood / Orlando regions.

TOP BARRIERS

■ **Price & Guest Experience:** As the top barrier, respondents strongly weighed the price of attendance, including attendant costs (airfare, hotel stays, and especially event add-ons), against concerns impacting guest experience like long wait times and heavy crowding.

- Concerns surrounding long lines, crowds, and price greatly contributed to respondents' previous negative HHN experience (70% experienced) and were top of mind when considering HHN this year (57% 'strongly agree' crowds/lines are an issue)
- Respondents have the impression that using an Express Pass is the only way to see most of the event
- Respondents strongly favor capping attendance (57% choosing), lowering Express Pass prices (45%), and other means to control lines/crowding that permit shorter lines, pulsing into Houses, and other downstream effects.

Crowding and long lines topped respondent concerns about HHN, in addition to the price of ticket add-ons and event tickets alone (See **Tab. Price & Guest Experience**). Many saw this coupling of long lines/crowds and rising prices as reducing the value of the event, with 48% of USH respondents and 39% of UOR respondents identifying value as their top economic barrier to attendance (See **Tab. Economics** in the Appendix for comparisons to other economic barriers).² Specifically, respondents at USH may have more difficulty justifying the cost of attending the event due to unacceptable crowding. Further, as 68% of USH respondents are financially responsible for purchasing tickets for themselves plus at least one other person and 59% of whom are from households earning less than \$100,000k (cf. 49% of UOR respondents), the financial burden for these respondents may make this justification harder. This may also explain the higher influence of competing Hollywood Halloween events on HHN softness at USH (see *§Competing events*).

<i>Price & Guest Experience</i>	UOR	USH
Crowding & Long lines		
<i>The event has become too crowded, leading to long lines.</i>	51%	64%
Express Pass too expensive		
<i>The price of Express Passes is too expensive</i>	52%	56%
RIP too expensive		
<i>The price of R.I.P. Tours is too expensive</i>	45%	45%
Event too expensive		
<i>The price of admission is too expensive.</i>	28%	39%
Quality / Value		
<i>The quality of the experience does not justify the price of admission.</i>	22%	33%

Tab. Price & Guest Experience: Percent 'Strongly Agree'. Base: UOR = 708, USH = 566.

Price and guest experience scales only. See Appendix for full table comparing all data.

Q: To what degree do you agree or disagree with the following statements?

Looking at the ticket breakdown from respondents' last visit to HHN, the preponderance were single-night ticket users. As several respondents opined, spending potentially thousands of dollars for one evening where there is no guarantee to experience most of the event's attractions in a single night was "crazy":

"[To] go under general admission is crazy. Was really considering purchasing front of the line for family but ... **really didn't want to [spend] thousands of dollars for a night of fun** even if that may be normal to some it's crazy for me" – USH respondent

"Fans that live outside of Florida is a very expensive activity. Budget must include flight, transportation, food and tickets. When all put together can be approx \$1,000 for 1 day. **Yes, \$1,000 is a lot for 1 day and not counting merchandise, cheap hotel, walk instead drive or taxi and eating cheap/bring outside food.**" –UOR respondent

Many respondents assert that products allowing customers to bypass lines, specifically the more affordable Express Pass (cf. RIP Tours), are necessary to a good HHN experience. These respondents report that they did not attend HHN this year and would not attend again in the future without an Express Pass, but that Express Passes are too expensive and/or are not in their budget.³

² Crucially, this value is not entirely tied to the quality of the event, with only 33% of USH and 22% of UOR respondents linking quality to price, though see *§Content* for more discussion.

³ Despite low Express Pass penetration (USH: 27%, UOR: 35%) among respondents, it stands that 81% of them (combined USH & UOR) agree that Express Pass prices are too high.

"It was my first time taking my teenagers and it was very disappointing. They **only were able to go on 1 maze** the entire time we were there the **wait time was way too long**. It was **expensive for us to upgrade to anything else**, time[s] are hard. I feel like it was too crowded and not worth the time and money. Both my kids were disappointed and I also feel like there is **not much to do besides wait in line and buy expensive food**. Honestly **not worth the money, the time, or the experience**." – USH respondent

"Crowds in 2023 were immense, and **even with an Express Pass, it was difficult to see all the houses during a single night**. Even after lining up before the event started, it left absolutely **no time to see the Nightmare Fuel show or spend more than a couple of minutes in the scare zones**. The experience was the opposite of relaxing and I left a bit underwhelmed. The **entertainment value was not worth the price**." – UOR respondent

"The event is **extremely expensive**, especially for out of towners. We attended for 2 nights in 2023, and after only accomplishing a few things the first night due to the extremely long lines, **felt it was necessary to purchase Express to really enjoy the event**. ... Everyone agrees that if you can only attend for a few nights **you basically have to get Express or it's not worth the trip**... **We make a very comfortable household income, and really wanted to return this year, but that cost is just too steep**. We went to local, more affordable haunts like Busch Gardens, Hershey park, and King's Dominion." – UOR respondent

These themes are echoed across several further exercises. When reflecting on previous negative experiences, the top five most cited concerns are related to long wait times for Houses (70% USH and 69% UOR) and crowding (68% USH, 61% UOR). Respondents also pointed to downstream effects, like low House penetration (40%) and conga lines through Houses (42%) as key negative experiences.

<i>Negative Experience – Top 5</i>	UOR	USH
Long wait time for Houses	69%	70%
General crowding	61%	68%
Couldn't experience Houses I wanted to experience	39%	41%
"Conga line" effect in Houses	42%	41%
Long wait time for food	28%	30%
...		

Tab. Neg Exp (Top 5): Percent selected. Base: UOR = 708, USH = 566. Full table of previous negative experiences for comparison in the Appendix.
Q: What potentially negative experiences did you encounter during your last visit? Please select all that apply.

Respondents were given the opportunity to express what changes they would need to see implemented at HHN to earn their visit in 2025. Unaided, *capped attendance* at HHN was a major current throughout, with some guests reporting that they would be willing to pay more for the experience (though not all), akin to Premium Scream Night. Some guests suggest that keeping ticket prices high is an intended strategy for limiting HHN attendance:

"I feel that the **amount of tickets sold should be more controlled, even if you have to raise your prices** so that people can actually enjoy the attractions and be able to experience them without waiting in line so longt." – UOR respondent

"Decrease prices or drastically limit how many can attend each night **so that fast passes aren't mandatory**" – UOR respondent

"The prices being far too high and overcrowding. **I understand the high prices may be to combat the number of fans that can attend**, but perhaps consider expanding the event like in the past. With a bigger fan base than ever before, there needs to be double the attractions and double the space. At 2018-2019 PRICES! – UOR respondent

"The crowds I think for me and most people are what kill my want to go. I think to fix that you either gotta **cut capacity** and maybe **raise prices to off set that or add more mazes**. HHN needs something that **can eat capacity like crazy to help keep crowds low** ... Maybe use the Waterworld space for a Halloween event." – USH respondent

Respondents then selected from a few *a priori* mitigation strategies in a multiple select task. Potential mitigations were divided into five broad categories: *Guest experience and Pricing* (see **Tab. Mitigations (Price x Exp)** below), *Policies, Content* and *Season* (See Appendix for full table). Consistent with open ended responses, *Guest experience and Pricing*

were on average more important to respondents than other categories. Specifically, respondents cited *Capped attendance* and *Pulsing into Houses* as top *Guest Experience* priorities, while lowering *Express Pass prices* and *Single night ticket prices* as top *Pricing* priorities.⁴

<i>Mitigations – Price & Guest experience</i>	UOR	USH
Capped attendance	53%	62%
Lower Express Pass price	43%	48%
Lower Single Night ticket price	40%	35%
Pulsing into Houses	37%	30%
Entertainment in queues	22%	19%
Improved queue management	20%	17%

Tab. Mitigations (Price x Exp): % Selected. Base: UOR = 708, USH = 566. Full table of mitigations in the Appendix.
Q: Of the following improvements Universal could make, which 5 would realistically encourage you to visit Halloween Horror Nights in 2025? Select up to 5

MINOR BARRIERS

■ **Content:** Content generally did not pose a significant barrier to attendance.

- USH respondents and HHN fans (3+ visits) were more likely to call out repetitiveness of the event and disinterest in IPs.
- But, when forced to make tradeoffs about how to improve their HHN experience, content-related mitigations were lower on the list than those related to price and guest experience.

Respondents were not as concerned with HHN's content as other barriers. In the overall barrier selection task (*\$Barriers to attendance*), only 22% of respondents identified content as a reason for not attending, which fact is reflected by 52% of UOR and 41% of USH respondents choosing "None of the above" when asked which content-related reasons best described their decision not to attend HHN (see **Tab. Content** below).

<i>Content</i>	UOR	USH
Repetitive / Not enough new things to do <i>The event seems repetitive / there are not enough new elements this year</i>	17%	26%
Limited ride/attraction availability <i>Limited availability of rides/attractions</i>	14%	18%
IPs not compelling <i>The Intellectual Properties (Insidious, Ghostbusters, A Quiet Place) did not appeal to me</i>	11%	16%
Poor quality Houses/Zones/Shows <i>The quality of the Houses, Scare Zones or Shows did not seem good</i>	11%	14%
Not scary enough <i>The event is not scary enough</i>	10%	11%
Not immersive enough <i>The experience is not immersive enough</i>	9%	10%
Event offerings not appealing <i>The event offering (scare-focused Haunted Houses and Scare Zones) does not appeal to me</i>	10%	7%
Too few Houses/Zones/Shows <i>There are too few Houses, Scare Zones and/or shows</i>	4%	11%
Poor food quality <i>Food quality is poor</i>	6%	6%
Theming, Atmosphere poor <i>The overall Halloween theming / atmosphere is poor</i>	4%	4%
Poor food availability <i>Food availability is poor</i>	3%	3%
None	52%	41%

Tab. Content: Percent selected. Base: UOR = 708, USH = 566.

Q: Of the following perceptions about the content of Halloween Horror Nights, which 3 most contributed to your decision not to attend the event.

⁴ Respondents were minimally concerned with the price of RIP Tours or multi-night products, as most were single-night ticket users on their most recent visit. But, locals who visit the event multiple times or International guests who may look to multi-night products to justify the expense of travel were more likely to select lowering prices for these products than respondents from other locales.

However, there is a significant 11ppt difference between “None” options for USH and UOR respondents, which is primarily distributed across repetitiveness of the event (9ppt difference, USH - UOR), too few event elements at HHN (7ppt difference), and interest in featured IP (5ppt difference). A further difference is that our frequent repeaters (3+ years of attendance) were significantly more likely to cite poor quality Houses and Scare Zones and repetitive content than guests newer to the event (24% vs. 12% UOR; 37% vs. 17% USH), albeit the absolute N is low (75 out of 314 repeaters UOR and 94 out of 257 USH).

“The USH version of the event has been drastically dropping in both quality and creativity for the last several years. A lot of content, including decor and even some haunts **feel rehashed rather than original**. It's also unacceptable how many of the **haunts fill space with long stretches of unthemed, black plywood rather than immersive sets**. USH's HHN used to be top tier. It's just not anymore. **The quality no longer matches the price tag**, so it isn't worth it.” – USH respondent

“The IPs were not interesting to me. Once I saw the preview night of the original houses I thought they **seemed very minimal**. The costumes and **overall general design seemed very bare and not as detailed or interesting as the past years** I had attended. The scare zones (especially the Blumhouse with actors just standing on a stage) seemed very boring.” – UOR respondent

<i>Content- Appeal & Novelty</i>	UOR	USH
Featured content		
<i>The featured content this year is less appealing than previous years.</i>	10%	18%
Repetitive		
<i>The themes and haunted houses are becoming repetitive.</i>	8%	17%
Tab. Content – Appeal & Novelty: Percent ‘Strongly Agree’. Base: UOR = 708, USH = 566. Content-related scales only. See Appendix for full table comparing all data. Q: <i>To what degree do you agree or disagree with the following statements?</i>		

When forced to make tradeoffs between possible mitigations, fewer respondents saw content-related areas as top priorities compared to price and guest experience (c.f., 38% of respondents favor lower SN ticket prices; see **Tab. Mitigations (Price x Exp)** above or **Tab. Mitigations** in the Appendix for further comparisons):

<i>Mitigations – Content</i>	UOR	USH
Ride/attraction availability	21%	23%
Scarier content	16%	20%
More exciting IPs for Houses	16%	18%
Improved House/Scare Zone quality	12%	19%
Theming	13%	14%
Increased food availability	10%	9%
Improved food quality	8%	7%
Tab. Mitigations – Content: Percent selected. Base: UOR = 708, USH = 566. Table shows content-related mitigations only. Full table of mitigations in the Appendix. Q: <i>Of the following improvements Universal could make, which 5 would realistically encourage you to visit Halloween Horror Nights in 2025? Select up to 5</i>		

■ **Marketing awareness:** Nearly all (~90%) respondents reported seeing or hearing at least one official or unofficial advertisement for HHN. A vast majority reported unofficial advertising as having a positive influence (29%) or no influence at all (56%) on their decision not to visit. Among negative influences, respondents reported seeing/hearing about lines and crowds.

Less than 10% of respondents identified marketing, specifically not hearing any buzz surrounding HHN, as a reason for their decision not to attend HHN this year (**Tab. Barriers** in *§Barriers to attendance*). In fact, nearly 9 in 10 (89%) UOR and USH (87%) respondents reported seeing at least one official advertisement for HHN. The most frequent ways respondents heard about HHN were through the official Universal social media platforms (53% UOR respondents, 38%

USH), on the HHN website (46% UOR, 45% USH), via email (48% UOR, 38% USH), or on Universal's website (48% UOR, 37% USH).

Across both official and unofficial buzz around HHN, respondents largely reported that it had no bearing on their decision not to attend (70% official ads, 55% unofficial). A plurality of respondents indicated that these advertisements made them more interested in attending, while a minority (upwards of 20%) indicated that these advertisements made them less interested or not interested in attending, especially among unofficial sources of information.

Frequently, respondents use information from friends, family, and influencers to inform their decision to attend HHN: Impressionistically, of the 100 participants who reported negative buzz and left a comment, most comments centered—again—around reports and perceptions of large crowds, long lines, and high prices for HHN tickets and Express Passes.

"I Knew A Lot Of People Who Attended The Event This Year And Every Single One Of Them Said To Not Waste My Money Going. They Said **The Lines Were So Long That You Could Only See Like Two Houses And A Show If You Were Lucky**. They Said It Was **So Crowded That It Wasn't Even Enjoyable**. And The Food Lines Were So Long That You'd Be Better Off Eating Before Or After The Event!" – UOR respondent

"People were saying that the **lines were long** and most of the **mazes were boring**. They also said that [there] wasn't that many scare actors in the scare zones compared to other events like Knotts Scary Farm." – USH respondent

"A majority of my theme park social media interactions occur on twitter (X), I love keeping up with all the house reveals and was wanting to attend. (Shout to whoever runs HHN's twitter account btw! They rock!) My final decision to not go was made after hearing feedback from friends / social media like X and Instagram and YouTube vlogs where **the scare zones were just okay, and the "story" wasn't as coherent and immersive as last year, and no one seemed to LOVE or truly fear any houses except Insidious**. I was a big fan of Nightmare Fuel last year and watched it over 10 times, and many said the new show wasn't as good. Many people complained about **how barren scare zones were and how there weren't as many rides open**." – UOR respondent

■ *Teenagers: Respondents noted hearing about unruly behavior in small numbers (2%). A tinier fraction (<2%) reported that teen behavior actively influenced their decision not to attend.*

Regarding other guests' poor behavior, specifically among teenagers, only 28 respondents (2%) called this out unaided when asked why they did not attend HHN this year⁵. Aided, just 22% of respondents cited bad teen behavior as contributing to a past negative experience, and policy enforcement mitigations (chaperones for under-18s, better line-cutting enforcement, etc.) were generally not as important to respondents as other possible improvements to HHN (See **Tab. Mitigations** in the Appendix to see how improvements compare to each other).

We asked respondents to identify any negative buzz they may have heard about the event. Only 23 respondents (2% total; USH: 5, UOR: 18) complained about unruly teenagers. Qualitatively, a minority identified other guests' behavior as a significant barrier to attendance, with many conceding that *price* and *budget* were the principal factors:

"[My decision not to attend] was mostly economical, however, I do not feel that I missed out on a great year. Social media groups in general have been negative about the **behavior of teenagers**, children being welcomed, inconsistent security guidelines regarding dress, etc."

"There was more buzz than normal about **unsupervised teens running around terrorizing guests** and that made me decide I **wouldn't swing it monetarily** because I wouldn't have a good time"

■ *Competing events: Respondents did not visit major competitors in large numbers, favoring local, small-scale Halloween events this year. USH experiences higher competition among major area competitors, especially Knott's Scary Farm, which 19% of respondents visited in lieu of HHN.*

⁵ We screened for the words, "teen(ager)", "unsupervised", "child(ren)", "kid(s)", and "minor(s)".

Compared to other barriers, *Competing events* was 5th of 8 broad categories with just 13% choosing. However, there was a sizeable difference between UOR and USH respondents: While 40% of UOR respondents visited another Halloween event, a full 60% of USH respondents did. Further, nearly 2 in 5 USH respondents vs. 1 in 5 UOR respondents reported attending at least one Halloween event *instead* of HHN.

<i>Competing events</i>	UOR	USH
Did not visit another event	60%	40%
Visited another event, but did not impact decision	20%	23%
Visited another event instead of HHN	20%	37%

Tab. Competitor Events: Percent selected. Base: UOR = 708, USH = 566.

Qs: *Have you visited, or do you plan to visit, any of the following Halloween events or attractions this year? Did you attend or do you plan to attend this event instead of Halloween Horror Nights?*

Of specific competitors, both Parks faced the most “competition” from events mostly local to respondents (reflected in *Other events* in **Tab. Competitor events (detail)**) and small in scale (e.g., corn mazes, pumpkin patches), suggesting that respondents were not planning to visit HHN anyway. Indeed, few respondents (15% USH, 11% UOR) visited these smaller events in lieu of HHN specifically, and fewer reported that these events were better quality than HHN. However, Knott’s Scary Farm did draw respondents away from HHN at USH (24% visited / 19% visited instead).

Greater Orlando / Florida event					Greater Hollywood / CA events				
	% Better value					% Better quality			
	% Better Quality					% Visited instead			
	% Visited					% Visited			
Mickey's Not-So Scary - MK	10%	6%	5%	5%	Knott's Scary Farm	24%	19%	16%	18%
Howl-O-Scream - SW OR	7%	4%	2%	4%	Oogie Boogie Bash - DCA	18%	9%	10%	8%
Howl-O-Scream - BG Tampa	7%	4%	3%	4%	Queen Mary's Dark Harbor	14%	10%	6%	9%
Six Flags Fright Fest	5%	1%	1%	2%	Six Flags Fright Fest	13%	8%	5%	6%
Other event	35%	11%	8%	16%	LA Haunted Hayride	10%	5%	2%	4%
					Howl-O-Scream - SW SD	4%	2%	2%	2%
					Other event	28%	15%	10%	16%

Tab. Competitor events (detail): Percent selected. Base: UOR = 708, USH = 566.

Qs: *Have you visited, or do you plan to visit, any of the following Halloween events or attractions this year? Did you attend or do you plan to attend this event instead of Halloween Horror Nights?*

Here, too, themes of price and crowding/lines permeated comments specifically calling out competitors, though some respondents also noted the novelty of competing events:

“The only enjoyable way for us to go is to have an express pass. **The cost of one night’s admission plus an express pass rivaled that of a FL resident Disney pixie pass that’s good for a year.** We bought the Disney passes instead this year.” – UOR respondent

“[HHN] was **[too] expensive compared to other theme parks** and I did not have as much fun as when I went to Six Flags or Knotts for their Halloween events. The cost to experience wasn't comparable as I did not want to wait in long lines.” – USH respondent

“It was between going to HHN or Knotts Scary Farm. Simply put, **KSF was cheaper, lines were shorter and I’d never been.** I had gone to HHN the last two years ... **I didn’t feel like I was missing out on anything new in Horror Nights** as none of the advertised mazes were that interesting. Knotts Scary Farm had **more mazes and quicker lines** than ... HHN.” – USH respondent

■ *Deferred attendance: Respondents largely did not defer their visit to HHN to account for Epic’s opening. International respondents more likely to defer than domestic ones.*

As reported in *Barriers*, 5% of USH respondents and 19% of UOR respondents indicated that the opening of Epic Universe in 2025 *influenced* their decision not to attend HHN this year. In a follow-up exercise, we drilled down on whether respondents’ plans to visit Epic Universe in 2025 influenced their decision not to attend HHN or visit UOR in 2024, specifically targeting those respondents whose “home park” is UOR (i.e., USH respondents were excluded). Ultimately, deferred visitation was not a big factor in explaining HHN 2024 softness. While 42% (300/708) of relevant respondents indicate planning to visit Epic next year, only 12% of UOR respondents (n = 88) reported that their Epic visitation plans influenced the decision not to attend HHN.

DEMOGRAPHICS & PROFILING

<i>Origin</i>	UOR	USH	Total	<i>Gender</i>	UOR	USH	Total
Local	20%	27%	23%	Male	39%	40%	39%
Same State	27%	49%	37%	Female	59%	58%	59%
OUS	38%	18%	29%	Nonbinary / other	2%	2%	2%
Intl	16%	7%	12%				

<i>HHI</i>	UOR	USH	Total	<i>Ethnicity</i>	UOR	USH	Total
Less than \$25,000	4%	9%	6%	Spanish / Hispanic / Latinx	16%	44%	29%
\$25,000 to \$49,999 a year	14%	20%	17%	White / Caucasian	73%	38%	57%
\$50,000 to \$74,999 a year	17%	16%	17%	Black / African American	5%	4%	4%
\$75,000 to \$99,999 a year	15%	13%	14%	Asian / Asian American	3%	9%	6%
\$100,000 to \$124,999 a year	14%	13%	14%	American Indian or Alaska Native	1%	1%	1%
\$125,000 to \$149,999 a year	10%	9%	10%	Native Hawaiian or Other Pacific Islander	1%	3%	2%
\$150,000 to \$174,999 a year	10%	7%	9%	Something else	1%	2%	1%
\$175,000 to \$199,999 a year	4%	3%	4%	Prefer not to say	7%	7%	7%
\$200,000 or more a year	12%	9%	11%				

<i>Last Visit</i>	UOR	USH	Total	<i>Tickets & Add Ons</i>	UOR	USH	Total
2024	0%	0%	0%	Single Night / GA Ticket	68%	40%	56%
2023	77%	79%	78%	In Park Add-On Ticket	9%	-	-
2022	59%	56%	58%	After 2PM Day / Night Ticket	-	14%	-
2021	33%	30%	32%	After 2PM Day / Night Universal Express Ticket	-	11%	-
2019	30%	28%	29%	Universal Express Ticket	-	20%	-
2018	24%	25%	25%	UEU Ticket	-	7%	-
2017	20%	20%	20%	Express Pass (UOR only)	35%	-	-
2016	16%	18%	17%	Day / Night Ticket	-	4%	-
2015	11%	13%	12%	Frequent / Rush of Fear Pass	11%	-	-
2014	10%	11%	10%	Frequent / Ultimate Fear Pass	-	2%	-
2013	9%	9%	9%	Ticket included w/Annual Pass	11%	1%	6%
2012	9%	8%	8%	Complimentary ticket	1%	<1%	1%
2011	7%	7%	7%	I'm not sure	<1%	1%	<1%
2010	8%	5%	7%				
2009	6%	4%	5%				
2008	5%	4%	5%	RIP Tour	7%	5%	-
2007	5%	2%	4%				
2006	4%	2%	3%				
2005 or before	8%	3%	6%				

<i>Crowds, Price, Content comparison</i>	UOR	USH
Crowding & Long lines		
<i>The event has become too crowded, leading to long lines.</i>	51%	64%
Express Pass too expensive		
<i>The price of Express Passes is too expensive</i>	52%	56%
RIP too expensive		
<i>The price of R.I.P Tours is too expensive</i>	45%	45%
Event too expensive		
<i>The price of admission is too expensive.</i>	28%	39%
Quality / Value		
<i>The quality of the experience does not justify the price of admission.</i>	22%	33%
Featured content		
<i>The featured content this year is less appealing than previous years.</i>	10%	18%
Repetitive		
<i>The themes and haunted houses are becoming repetitive.</i>	8%	17%

Tab. Crowds, Price, Content: Degree to which participants agree with common high-level concerns. Percent 'Strongly Agree'. Base: UOR = 708, USH = 566.

Q: To what degree do you agree or disagree with the following statements?

<i>Economic concerns</i>	UOR	USH
Value		
<i>The event does not justify the total cost of attending</i>	39%	48%
Economy / Inflation		
<i>Overall economy, inflation</i>	28%	34%
Budget		
<i>Visiting UOR / USH or HHN did not fit my budget</i>	35%	34%
Decreasing spending		
<i>I am decreasing my spending</i>	16%	19%
Cost of staying in Hollywood/Orlando		
<i>Staying in Orlando / Hollywood did not fit my budget</i>	12%	10%
Other		
<i>Another economic reason</i>	10%	8%
Airfare		
<i>Airfare to Orlando / Hollywood did not fit my budget (Base: OUS, Intl respondents)</i>	12%	7%
None	20%	13%

Tab. Economics: Percent of respondents selecting each concern. Base: UOR = 708, USH = 566.

Q: Which of the following economic reasons, if any, apply to your decision not to attend HHN this year? Select all that apply.

<i>HHN Content</i>	UOR	USH
Repetitive / Not enough new things to do	17%	26%
<i>The event seems repetitive / there are not enough new elements this year</i>		
Limited ride/attraction availability	14%	18%
<i>Limited availability of rides/attractions</i>		
IPs not compelling	11%	16%
<i>The Intellectual Properties (Insidious, Ghostbusters, A Quiet Place) did not appeal to me</i>		
Poor quality Houses/Zones/Shows	11%	14%
<i>The quality of the Houses, Scare Zones or Shows did not seem good</i>		
Not scary enough	10%	11%
<i>The event is not scary enough</i>		
Not immersive enough	9%	10%
<i>The experience is not immersive enough</i>		
Event offerings not appealing	10%	7%
<i>The event offering (scare-focused Haunted Houses and Scare Zones) does not appeal to me</i>		
Too few Houses/Zones/Shows	4%	11%
<i>There are too few Houses, Scare Zones and/or shows</i>		
Poor food quality	6%	6%
<i>Food quality is poor</i>		
Theming, Atmosphere poor	4%	4%
<i>The overall Halloween theming / atmosphere is poor</i>		
Poor food availability	3%	3%
<i>Food availability is poor</i>		
None	52%	41%

Tab. Content: Percent selecting each content-related reason for not attending HHN 2024. Base: UOR = 708, USH = 566.

Q: Of the following perceptions about the content of Halloween Horror Nights, which 3 most contributed to your decision not to attend the event.

<i>Negative Experience</i>	UOR	USH
Long wait time for Houses	69%	70%
General crowding	61%	68%
Couldn't experience Houses I wanted to experience	39%	41%
"Conga line" effect in Houses	42%	41%
Long wait time for food	28%	30%
Unsupervised teens	23%	22%
Too few Scareactors	13%	20%
Line cutting	16%	19%
Other guests' poor behavior	18%	17%
Something else related to your experience	11%	11%
Specialty food was unavailable / ran out	8%	8%
Negative TM experience	4%	5%
Safety or accessibility	3%	4%
Negative Scareactor experience	2%	3%
None	7%	7%

Tab. Neg Exp: Percent selected. Base: UOR = 708, USH = 566.

Q: What potentially negative experiences did you encounter during your last visit? Please select all that apply.

<i>Mitigations</i>	UOR	USH	Total
Capped attendance	53%	62%	57%
Lower Express Pass price	43%	48%	45%
Lower SN price	40%	35%	38%
Pulsing into Houses	37%	30%	34%
Chaperones for under 18s	23%	21%	22%
Ride/attraction availability	21%	23%	22%
More available nights	21%	20%	21%
Entertainment in queues	22%	19%	20%
Improved queue management	20%	17%	18%
Scarier content	16%	20%	18%
More exciting IPs for Houses	16%	18%	17%
Improved House/SZ quality	12%	19%	15%
Line cutting enforcement	14%	15%	14%
Theming	13%	14%	13%
Lower RIP price	14%	12%	13%
More special event nights	12%	13%	12%
Lower MN price	17%	6%	12%
Guest conduct policy enforcement	12%	10%	11%
Additional Scareactors	8%	14%	11%
Increased food availability	10%	9%	10%
Improved food quality	8%	7%	8%
Capped alcohol sales	3%	4%	4%
Additions TMs	1%	4%	2%
None	5%	5%	5%

Tab. Mitigations: Possible mitigations categorized by theme: ■ *Guest experience*, ■

Pricing, ■ *Policies*, ■ *Content*, and ■ *Season*. Percent selected. Base: UOR = 708, USH = 566.

Q: Of the following improvements Universal could make, which 5 would realistically encourage you to visit Halloween Horror Nights in 2025? Select up to 5.