

ENIGMA INDEPENDENT EVENT AUDITS
Unbiased Intelligence for Senior Marketers



enigma
research

2017 STATE FAIR OF TEXAS

Dallas, Texas

September 29 - October 22, 2017



CONFIDENTIAL

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- P5 Sponsors and Brand Activations
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- P23 Comments and Methodology

Most popular reasons for attending

- 1 To eat a meal or try new food
- 2 To socialize with friends and family
- 3 For midway rides and games

Top on-site beverages consumed

- 1 Bottled water
- 2 Soda or soft drinks
- 3 Beer

Most popular Main Stage performers

- 1 La Mafia
- 2 Los Traileros del Norte
- 3 Flo Rida with Macy Kate

Most appreciated Truck Zone exhibits

- 1 Chevrolet
- 2 Nissan
- 3 Ford

Most recalled sponsors

- 1 Chevrolet
- 2 Ford
- 3 Dr Pepper

Preferred brands

- Auto insurance: Allstate
- Wireless service provider: AT&T
- Liquor or spirits: Crown Royal whisky

Most visited brand activations

- 1 Kids' Boardwalk by McDonald's
- 2 Texas Lottery Luck Zone
- 3 Mattress Firm

Tourism and economic impact

- Percentage non-local: 18%
- Estimated hotel room nights: 55,200
- Estimated economic impact: \$67.2M

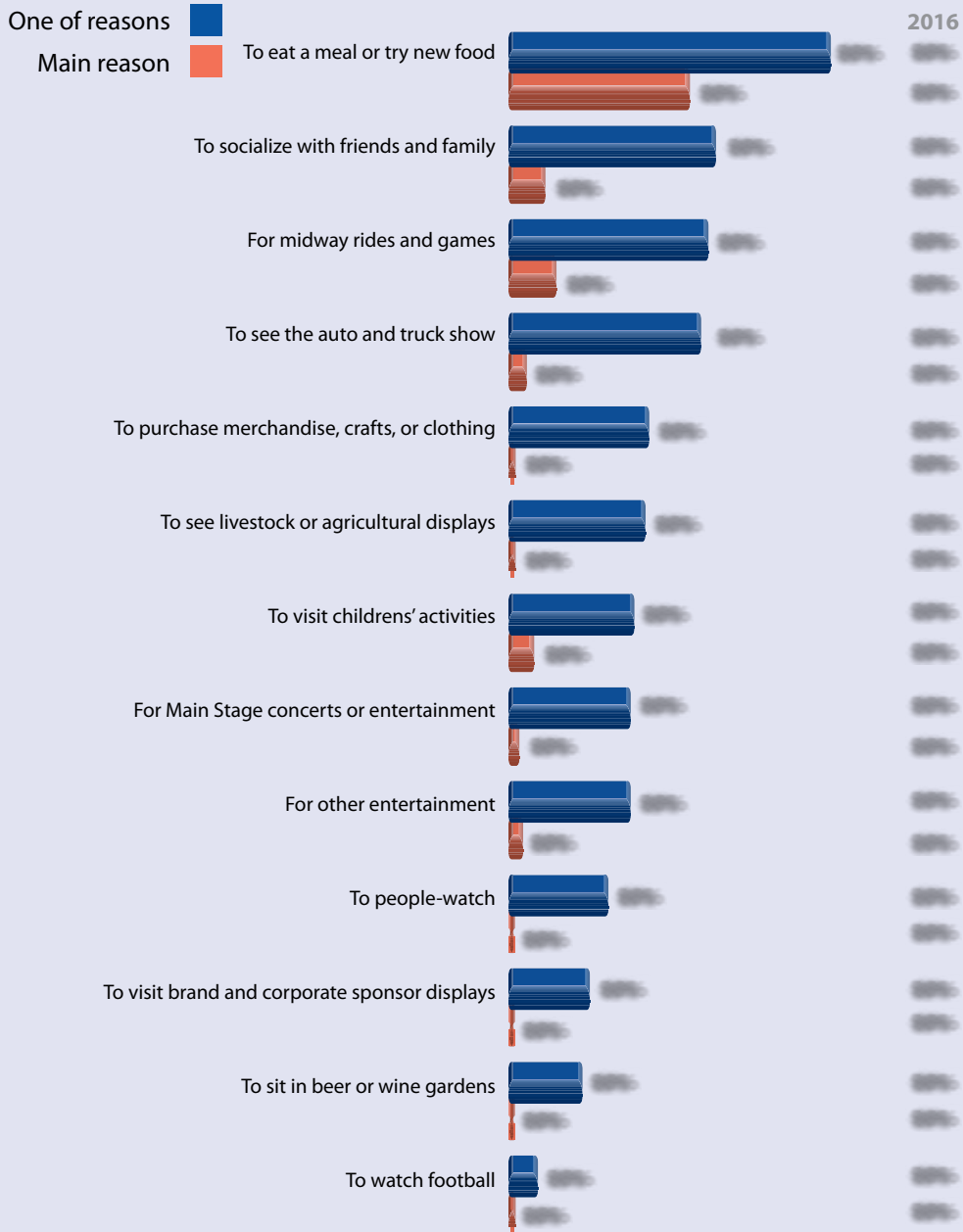
Most appreciated brand activations

- 1 Kids' Boardwalk by McDonald's
- 2 Community Coffee
- 3 Chevrolet Ride & Drive

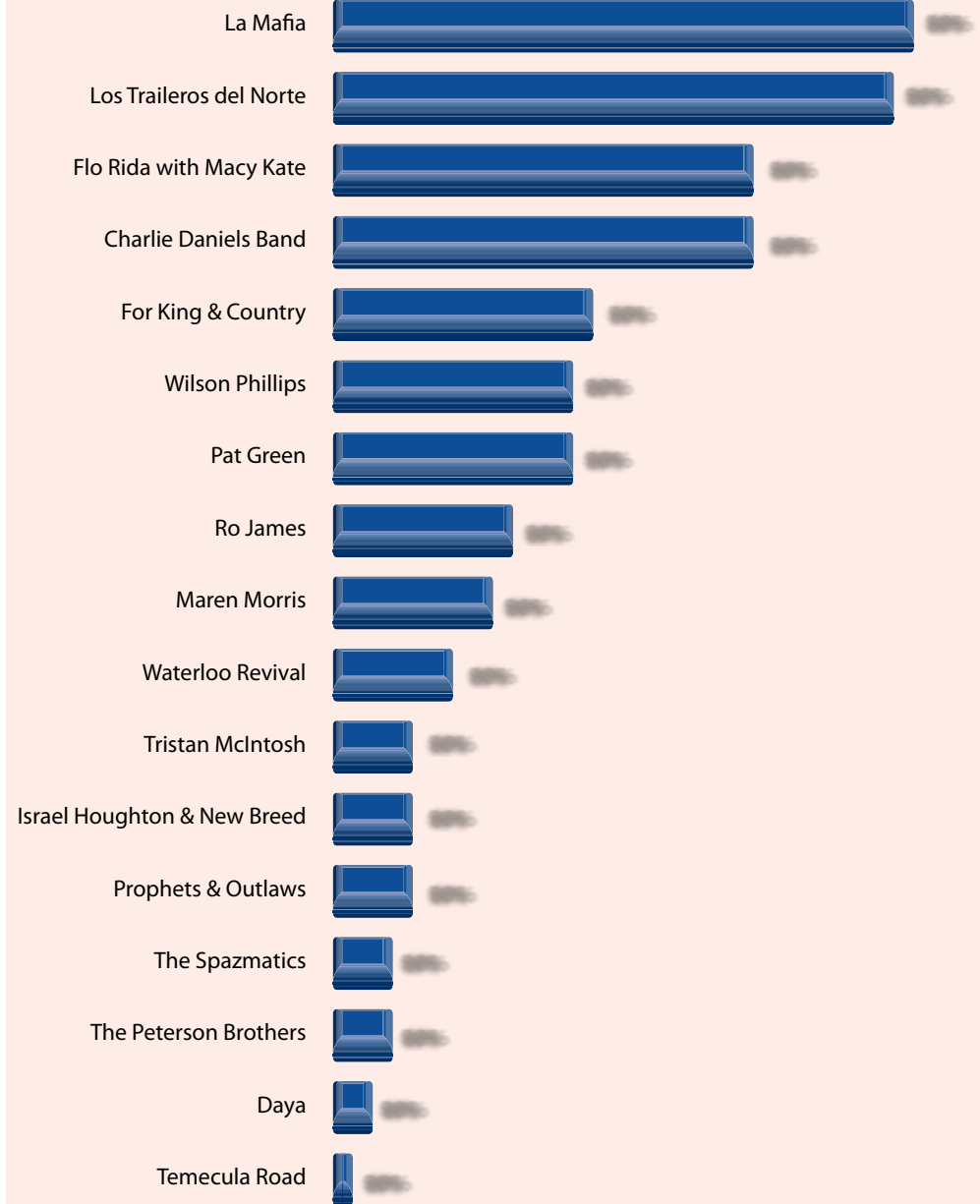
Best attendee comments

- "The State Fair was our first date and have attended every year for 26 years."
- "If I had to choose between the Fair and Christmas, I would choose the Fair!"
- "We drive to Dallas from Missouri every year just for the fair!"

Reasons for attending event (aided)

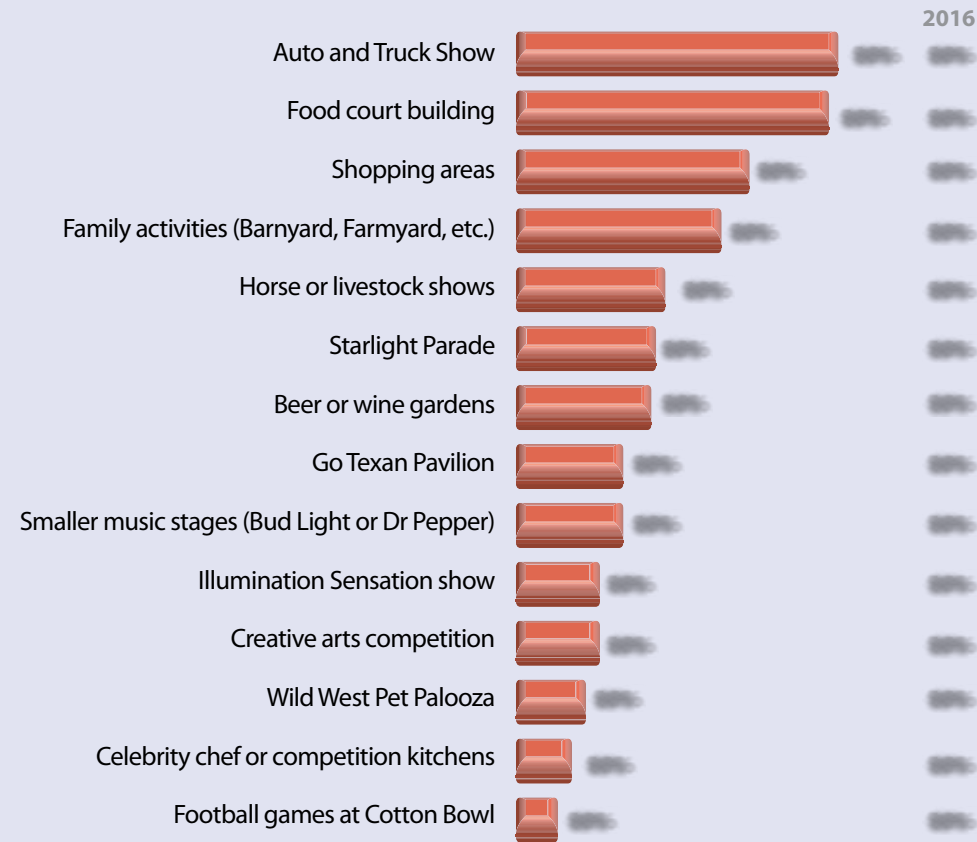


Main Stage performances watched (among those who watched Main Stage performances)



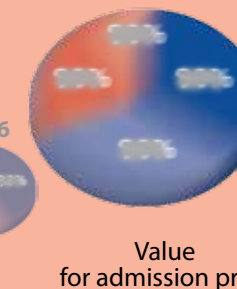
Event Experience

Featured attractions visited



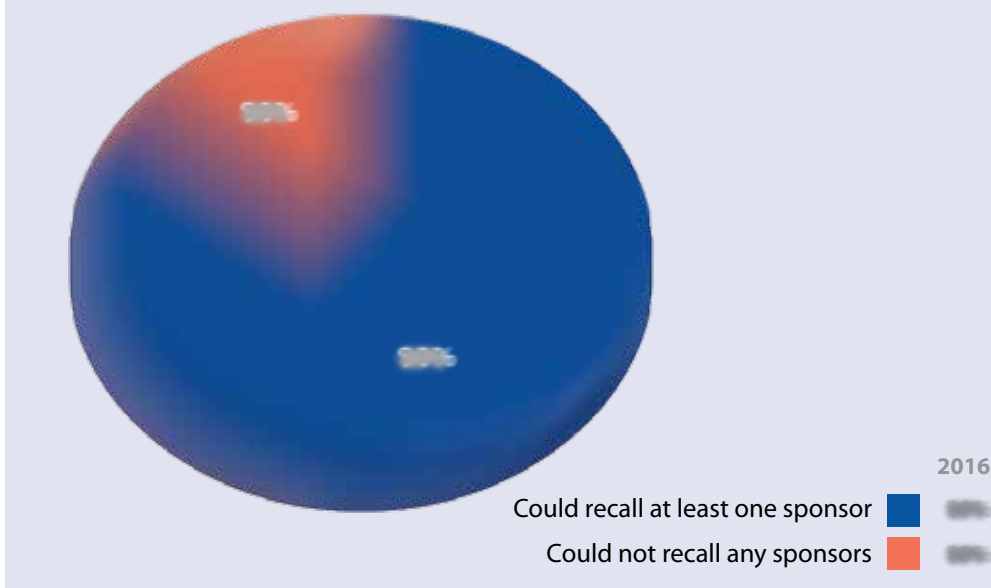
Event ratings

excellent
 good
 fair
 poor

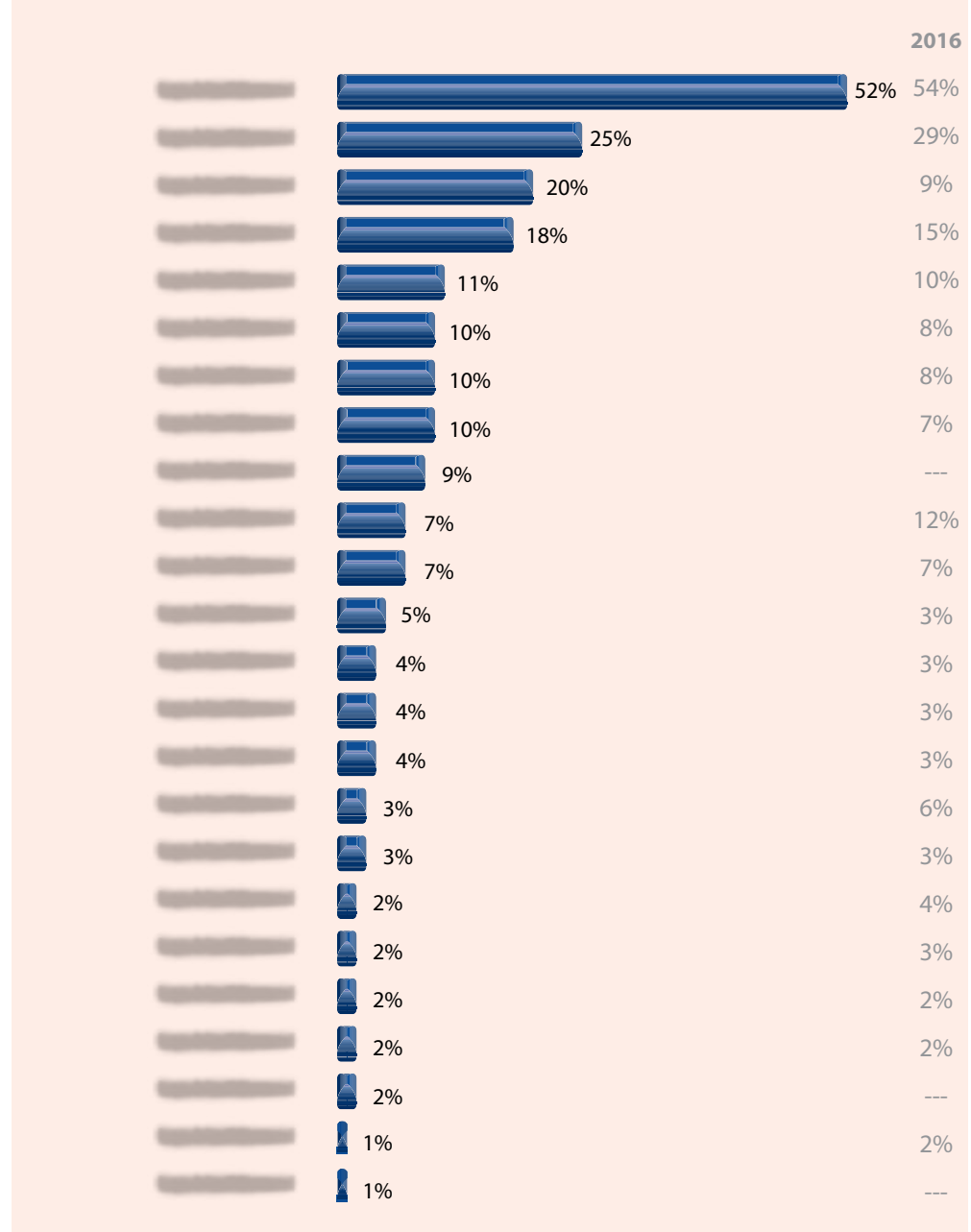


Sponsor Recall and Appreciation

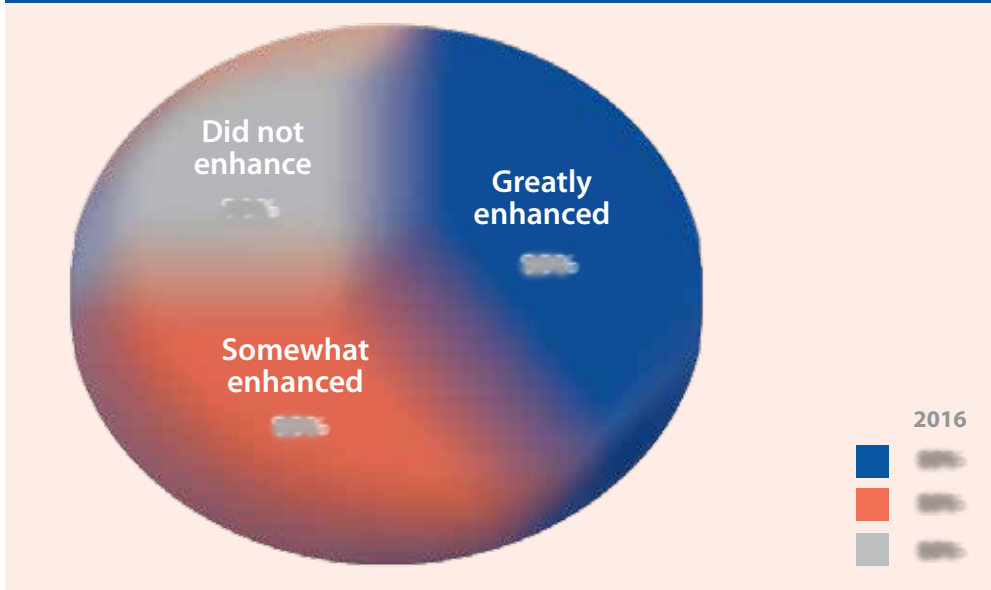
Sponsor recall



Sponsor recall (top 3 unaided among those who could recall sponsors)



Extent to which brands and corporate sponsors enhanced experience



Brand Activation Evaluations

PREVIEW
VERSION



Kids' Boardwalk by McDonald's



Texas Lottery Luck Zone



Mattress Firm



Dairy Discovery Zone



Chevrolet Ride & Drive

PARTICIPATION RANKING

1

2016

2

3

4

5

2016

ENHANCEMENT RANKING

1

3

1

1

1

1

1

PARTICIPATION

Entered exhibit	100%	100%	100%	100%	100%
Saw from outside	100%	100%	100%	100%	100%
Did not see	100%	100%	100%	100%	100%

ACTIONS TAKEN (among those who entered)

Relaxed with friends or family	100%	Watched contestants spin or use Money Machine	100%	Looked at or tried mattresses	100%	Entered building to see interactive exhibits	100%	Watched others drive vehicles	100%
Enjoyed crafts, face painting, or temporary tattoos	100%	Purchased other lottery ticket	100%	Looked at or tried massage chairs	100%	Learned something new about dairy products	100%	Test drove vehicle (not Camaro or Corvette)	100%
Watched Ronald McDonald show	100%	Purchased spin and win promotion	100%	Looked at hot tubs	100%	Received free merchandise	100%	Received free t-shirt or gift	100%
Watched another performance or show	100%	Purchased Money Machine promotion	100%	Looked at saunas	100%	Took photo to win free milk for a year	100%	Test drove Camaro or Corvette	100%
								Relaxed with friends or family	100%
								Looked at or sat in vehicles but did not drive	100%

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	100%	100%	100%	100%	100%
Somewhat enhanced	100%	100%	100%	100%	100%
Did not enhance	100%	100%	100%	100%	100%

MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

All who entered	100%	All who entered	100%	All who entered	100%	All who entered	100%	GM owners	100%
Fast food consumers	100%					Families with children	100%	Other brand owners	100%

Brand Activation Evaluations



AG-Power John Deere

6



T-Mobile

7



Community Coffee

8



Bud Light

9



Cricket Wireless

10

PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION

Entered exhibit	AG-Power John Deere	T-Mobile	Community Coffee	Bud Light	Cricket Wireless
Saw from outside	AG-Power John Deere	T-Mobile	Community Coffee	Bud Light	Cricket Wireless
Did not see	AG-Power John Deere	T-Mobile	Community Coffee	Bud Light	Cricket Wireless

ACTIONS TAKEN (among those who entered)

Sat on machinery	AG-Power John Deere	Looked at mobile phones on display	T-Mobile	Received complimentary hot coffee	Community Coffee	Played bag toss or Jenga game	Bud Light	Played or watched baseball pitch game	Cricket Wireless
Spoke with representative	AG-Power John Deere	Spoke with representative	T-Mobile	Received complimentary iced coffee	Community Coffee	Received Bud Light beverage	Bud Light	Received free merchandise	Cricket Wireless
Purchased toys or merchandise	AG-Power John Deere	Spun wheel to win merchandise	T-Mobile	Received branded merchandise	Community Coffee	Received branded merchandise	Bud Light	Played bag toss game	Cricket Wireless
		Played giant Jenga game	T-Mobile			Used photo kiosk	Bud Light	Looked at mobile devices	Cricket Wireless
						Entered contest to win tailgating kit	Bud Light	Spoke with representative	Cricket Wireless
								Tried virtual reality experience	Cricket Wireless

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	AG-Power John Deere	T-Mobile	Community Coffee	Bud Light	Cricket Wireless
Somewhat enhanced	AG-Power John Deere	T-Mobile	Community Coffee	Bud Light	Cricket Wireless
Did not enhance	AG-Power John Deere	T-Mobile	Community Coffee	Bud Light	Cricket Wireless

MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

All who entered	AG-Power John Deere	T-Mobile customers	T-Mobile	All who entered	Community Coffee	Budweiser preferred brand	Bud Light	Cricket Wireless customers	Cricket Wireless
		Other brand customers	T-Mobile			Other preferred brand	Bud Light	Other brand customers	Cricket Wireless

Brand Activation Evaluations



Sprint

10



AT&T

12



TSC

13



Allstate

13



5-Hour Energy

15

PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION

Entered exhibit	100%	100%	100%	100%	100%
Saw from outside	100%	100%	100%	100%	100%
Did not see	100%	100%	100%	100%	100%

ACTIONS TAKEN (among those who entered)

Looked at mobile devices	100%	Received free merchandise	100%	Received free promotional items	100%	Looked at football jerseys on display	100%	Received complimentary merchandise	100%
Played bag toss, Jenga, or Connect 4 games	100%	Played ball and ring toss games	100%	Entered contest to win prizes	100%	Sat on inflatable furniture	100%	Played or watched football Bullseye Blast game	100%
Spoke with representative	100%	Looked at mobile devices on display	100%	Played "animal feeding" toss game	100%	Played giant Connect Four game	100%	Played or watched basketball Shot Clock game	100%
Entered to win Tailgate package	100%	Spoke with representative	100%	Took photo with simulated Bull	100%	Used #SWEETTALK booth to record video message	100%	Received complimentary 5-Hour Energy beverage	100%
Used charging station	100%			Played or watched strength test hammer game	100%				
Tried virtual reality roller coaster	100%			Watched stage presentation	100%				

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	100%	100%	100%	100%	100%
Somewhat enhanced	100%	100%	100%	100%	100%
Did not enhance	100%	100%	100%	100%	100%

MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

Sprint customers	100%	AT&T customers	100%	All who entered	100%	Allstate customers	100%	All who entered	100%
Other brand customers	100%	Other brand customers	100%			Other brand customers	100%		

Outdoor Truck Zone Exhibit Evaluations



Chevrolet

1

2016

1

1



Ford

2

2016

1

2



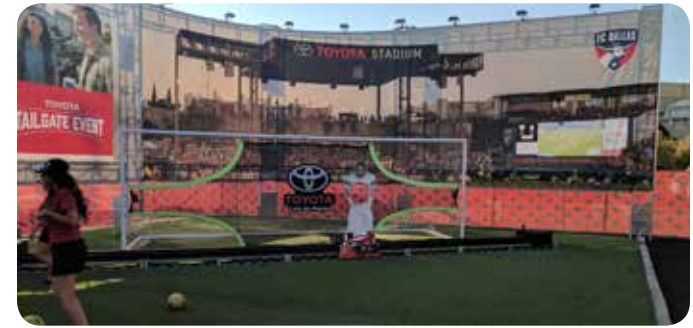
Toyota

3

2016

1

3



PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION

Entered exhibit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saw from outside	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did not see	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ACTIONS TAKEN (among those who entered)

Sat in vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listened to presenter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spoke with representative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SPECIAL FEATURES EXPERIENCED (among those who entered)

Walked through water mist cooling station	<input type="checkbox"/>	Registered to win vehicle	<input type="checkbox"/>	Took photos with BIG or Texas signs	<input type="checkbox"/>
Played or watched giant bag toss game	<input type="checkbox"/>	Played or watched lifting game	<input type="checkbox"/>	Received branded merchandise	<input type="checkbox"/>
Took photos through Chevrolet picture frames	<input type="checkbox"/>	Visited Raptor remote control truck activity	<input type="checkbox"/>	Played or watched football and soccer challenge	<input type="checkbox"/>
		Entered Guess Number of Footballs contest	<input type="checkbox"/>	Watched Toyota Live! stage show	<input type="checkbox"/>

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Somewhat enhanced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did not enhance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

Japanese brand owners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GM owners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ford-Lincoln owners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FCA owners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
European brand owners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Korean brand owners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Outdoor Truck Zone Exhibit Evaluations



GMC



2016



RAM



2016



Nissan



2016



PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION

	GMC	RAM	Nissan
Entered exhibit	100%	100%	100%
Saw from outside	100%	100%	100%
Did not see	100%	100%	100%

ACTIONS TAKEN (among those who entered)

	GMC	RAM	Nissan
Sat in vehicle	100%	100%	100%
Listened to presenter	100%	100%	100%
Spoke with representative	100%	100%	100%

SPECIAL FEATURES EXPERIENCED (among those who entered)

Used charging stations	100%	Received branded merchandise	100%	Participated in or watched Take on Texas obstacle challenge	100%
		Rode or watched mechanical bull	100%		
		Played or watched giant Power Shot plinko game	100%		
		Entered contest to win \$45,000 towards vehicle	100%		
		Played or watched strength test hammer game	100%		

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

	GMC	RAM	Nissan
Greatly enhanced	100%	100%	100%
Somewhat enhanced	100%	100%	100%
Did not enhance	100%	100%	100%

MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

	GMC	RAM	Nissan
Japanese brand owners	100%	100%	100%
GM owners	100%	100%	100%
Ford-Lincoln owners	100%	100%	100%
FCA owners	100%	100%	100%
European brand owners	100%	100%	100%
Korean brand owners	100%	100%	100%

Indoor Auto Show Exhibit Evaluations

PREVIEW
VERSION



Ford

1



Chevrolet-Buick

2



Toyota-Lexus

3



Chrysler-Dodge-Jeep-Fiat

4



Hyundai

5

PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION

Entered exhibit	100%	100%	100%	100%	100%
Saw from outside	100%	100%	100%	100%	100%
Did not see	100%	100%	100%	100%	100%

ACTIONS TAKEN (among those who entered)

Sat in vehicle	100%	100%	100%	100%	100%
Listened to presenter	100%	100%	100%	100%	100%
Spoke with representative	100%	100%	100%	100%	100%

SPECIAL FEATURES EXPERIENCED (among those who entered)

Watched @HankTheRobot show	100%	Used charging stations	100%	Looked at M&Ms race car	100%	Played or watched Viper Challenge game	100%	Played or watched Hyundai Gran Turismo racing game	100%
Played or watched driving game	100%	Tried Chevrolet color customizer kiosk	100%	Took action photo with BMX or skateboard	100%	Used charging stations	100%	Registered to win Best Buy gift car	100%
						Received Jeep photo silhouette sticker	100%	Registered to win Super Bowl tickets	100%
						Used photo kiosk	100%	Played or watched Hyundai Swag knowledge game	100%
						Entered to win \$45,000 towards vehicle	100%	Participated in #HyundaiWinningCatch football feature	100%

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	100%	100%	100%	100%	100%
Somewhat enhanced	100%	100%	100%	100%	100%
Did not enhance	100%	100%	100%	100%	100%

MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

Japanese brand owners	100%	100%	100%	100%	100%
GM owners	100%	100%	100%	100%	100%
Ford-Lincoln owners	100%	100%	100%	100%	100%
FCA owners	100%	100%	100%	100%	100%
European brand owners	100%	100%	100%	100%	100%
Korean brand owners	100%	100%	100%	100%	100%

Indoor Auto Show Exhibit Evaluations



Nissan

6

■



Kia

7

■



Subaru

7

■



Volkswagen

9

■



PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION

Entered exhibit	100%	100%	100%	100%
Saw from outside	100%	100%	100%	100%
Did not see	100%	100%	100%	100%

ACTIONS TAKEN (among those who entered)

Sat in vehicle	100%	100%	100%	100%
Listened to presenter	100%	100%	100%	100%
Spoke with representative	100%	100%	100%	100%

SPECIAL FEATURES EXPERIENCED (among those who entered)

Entered to win \$500 Amazon gift card 100%

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	100%	100%	100%	100%
Somewhat enhanced	100%	100%	100%	100%
Did not enhance	100%	100%	100%	100%

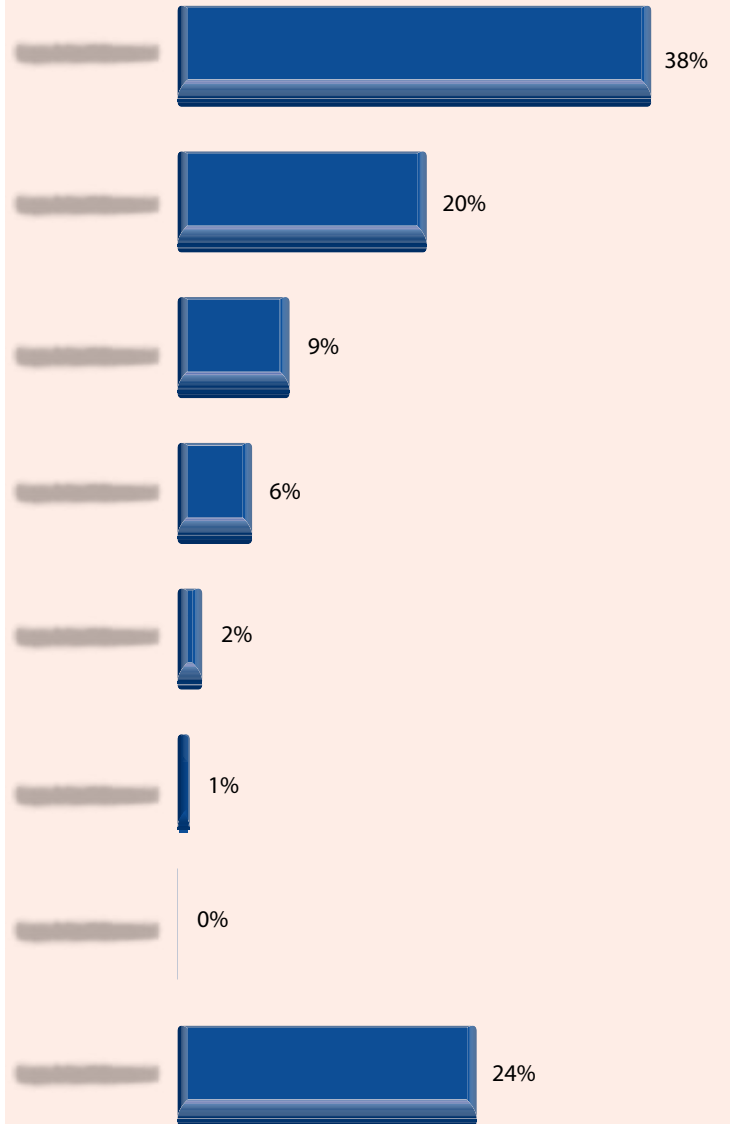
MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

Japanese brand owners	100%	100%	100%	100%
GM owners	100%	100%	100%	100%
Ford-Lincoln owners	100%	100%	100%	100%
FCA owners	100%	100%	100%	100%
European brand owners	100%	100%	100%	100%
Korean brand owners	100%	100%	100%	100%

Beverage Consumption

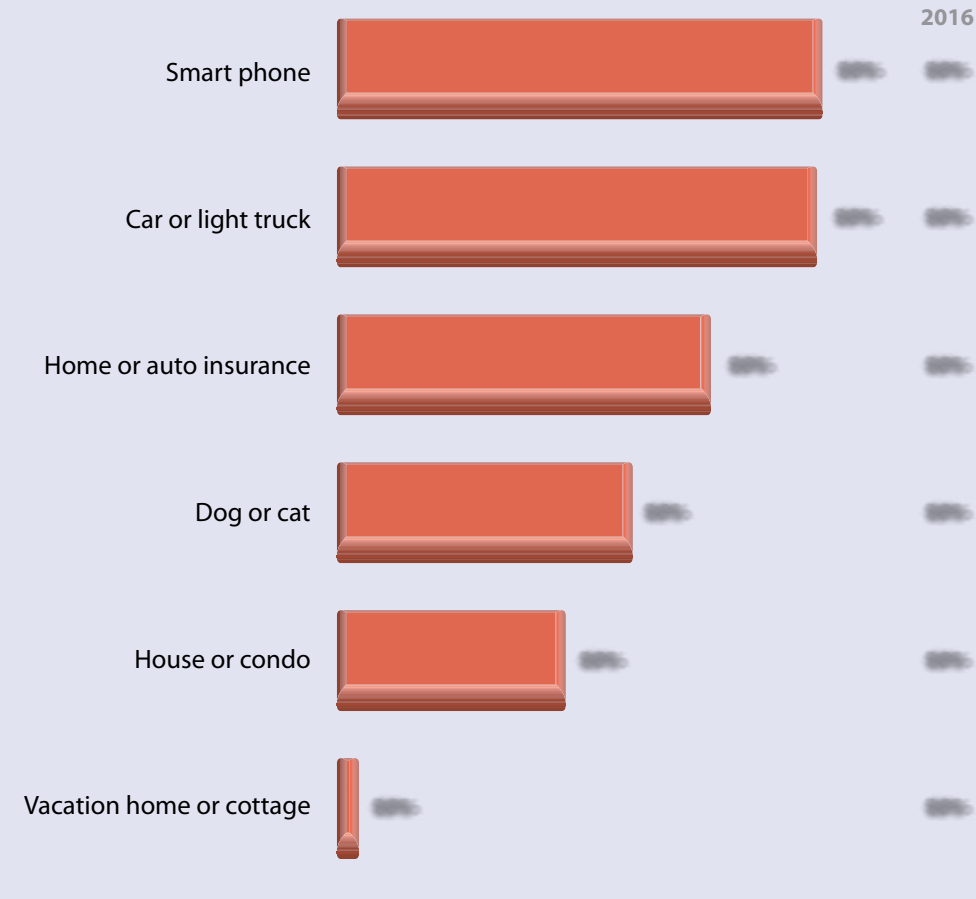
Beverages consumed on-site	Percentage consumed on-site	Average daily consumption (among consumers)
Bottled water		
Soda or soft drinks		
Beer		
Liquor or spirits		
Juice		
Wine or wine drinks		
Coffee or coffee drinks		
Energy drinks		
Other beverages		

Type of liquor or spirits consumed most (among those who consumed liquor or spirits)

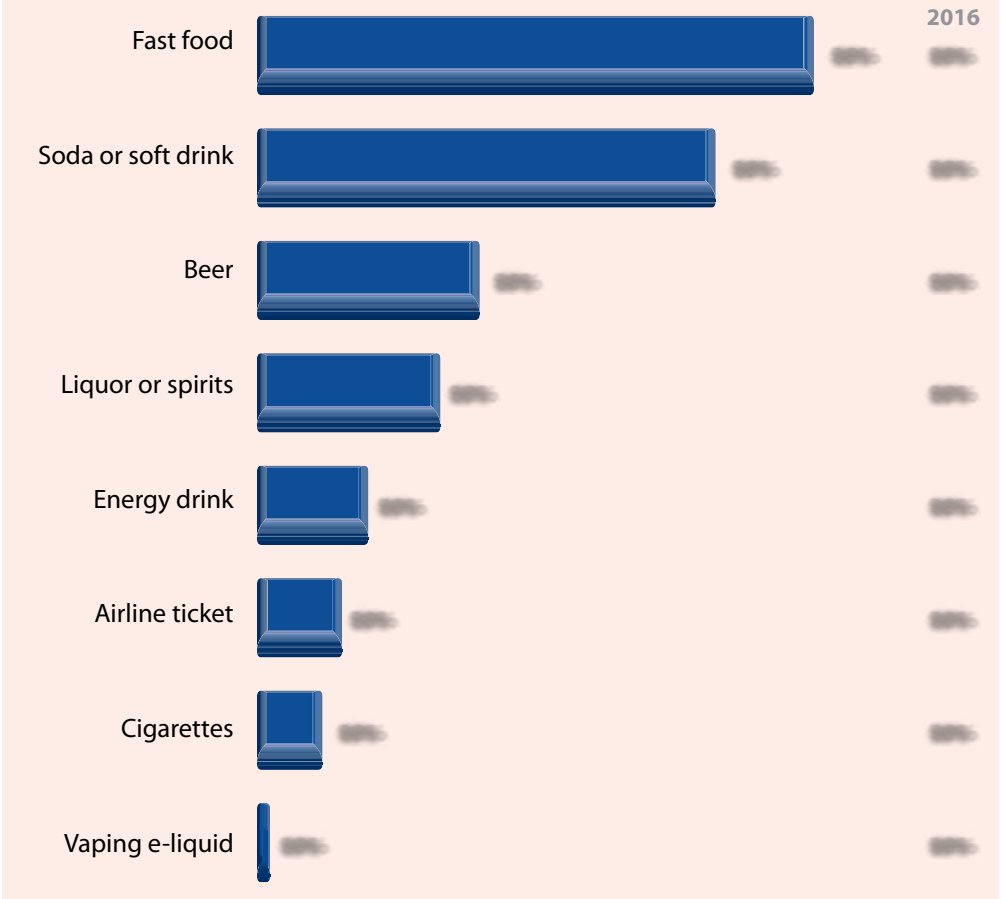


Product Ownership and Use

Product ownership



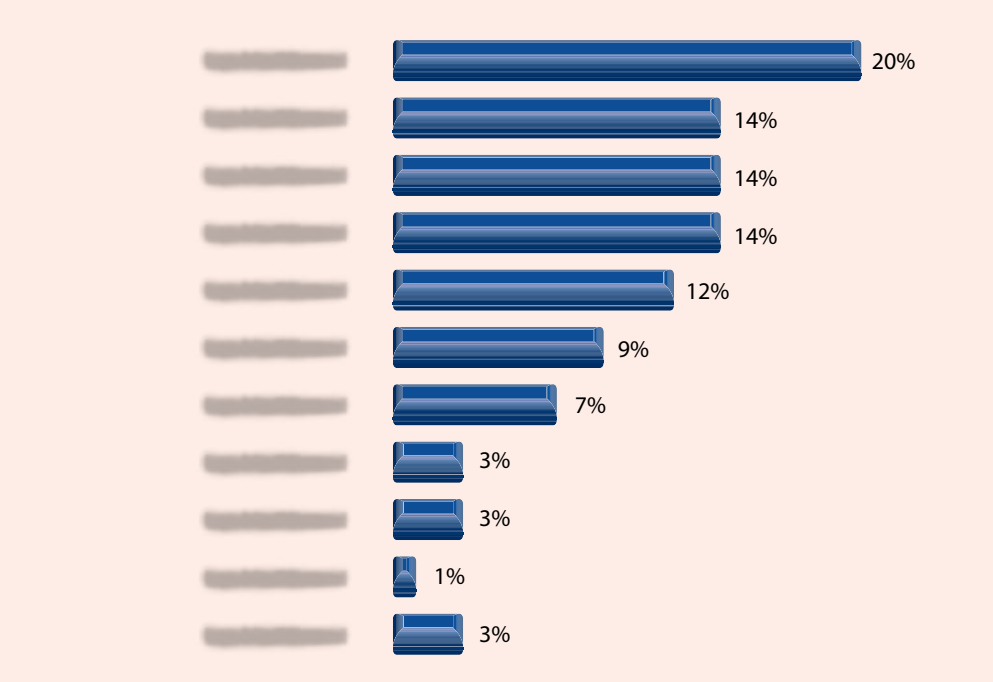
Products purchasing within next 30 days



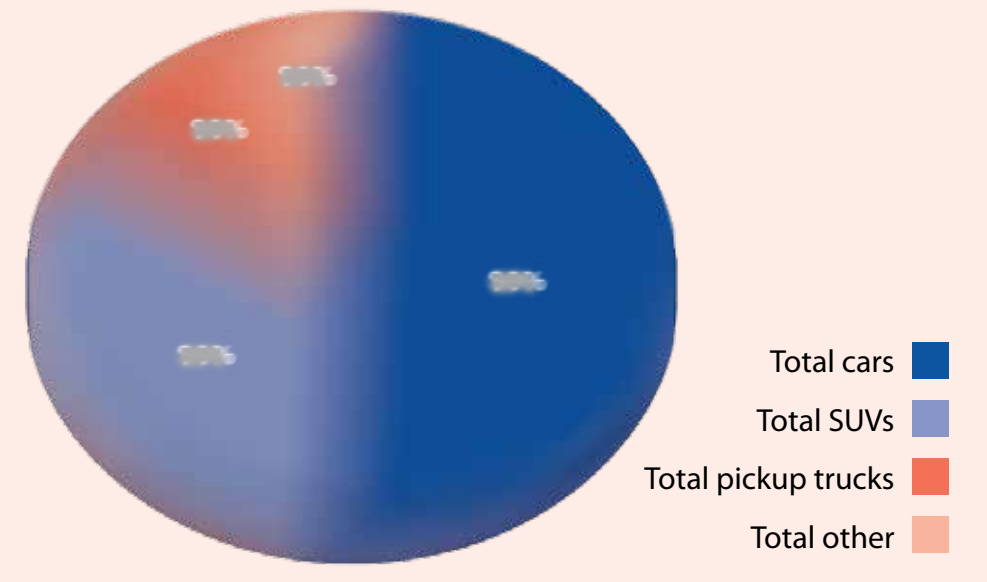
Vehicle ownership



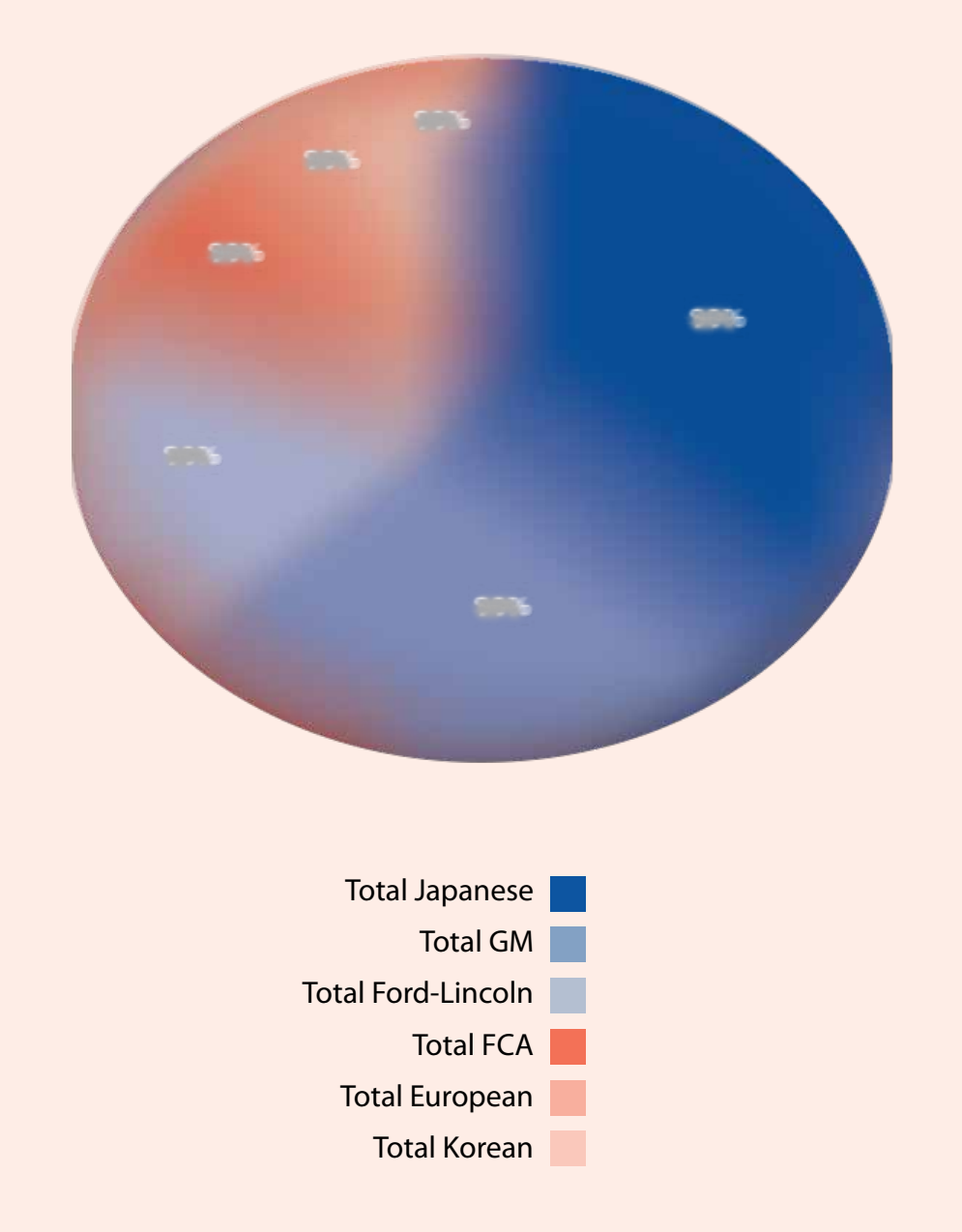
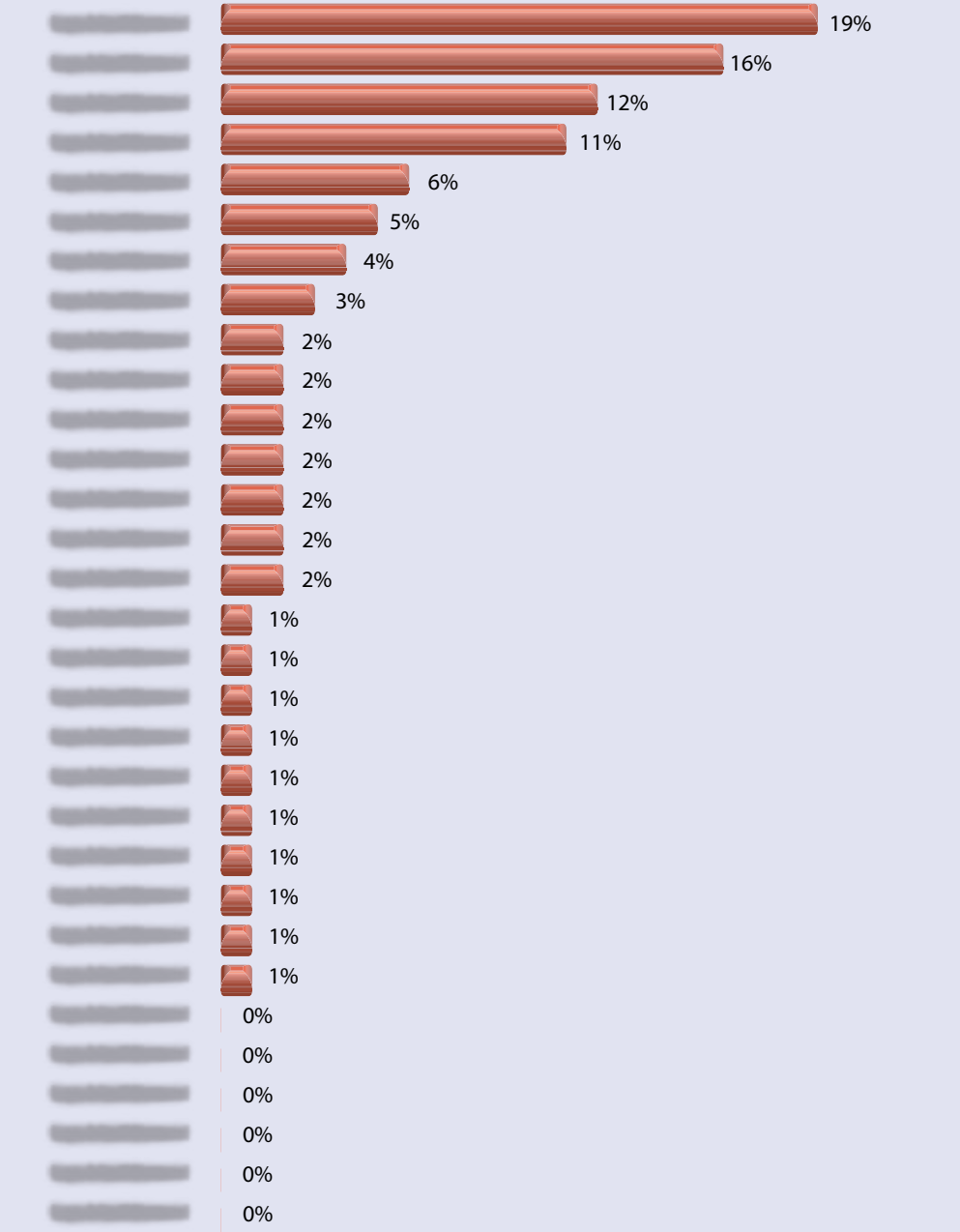
Type of vehicle driven (among owners)



Total vehicles

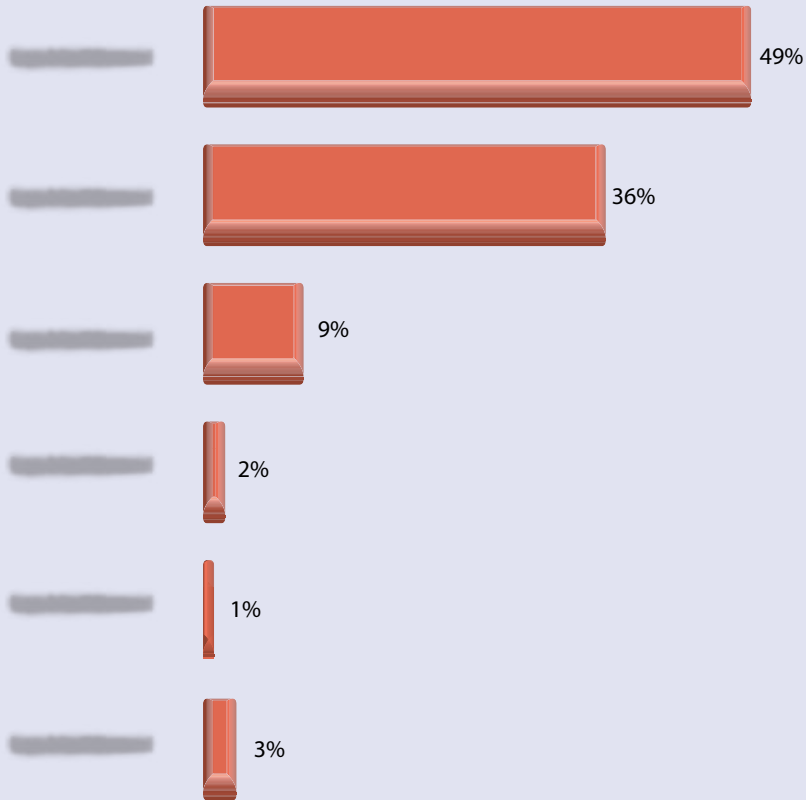


Brand of Vehicle Driven (among owners)

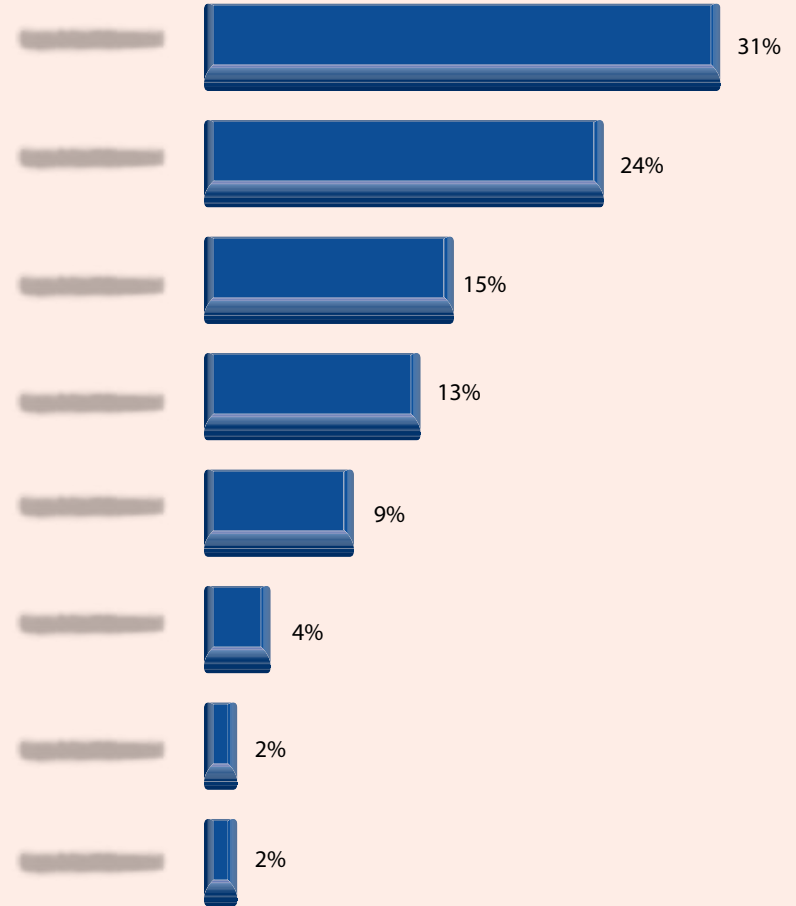


Telecommunications Brand Preferences

Smart phone or tablet used most often (among owners)

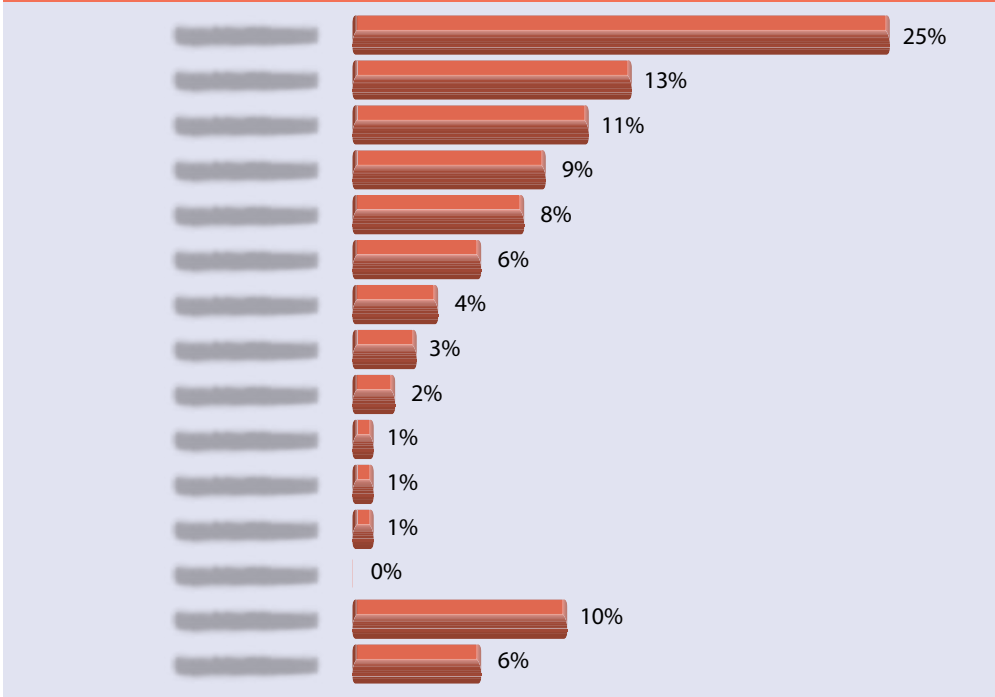


Wireless service provider (among users)

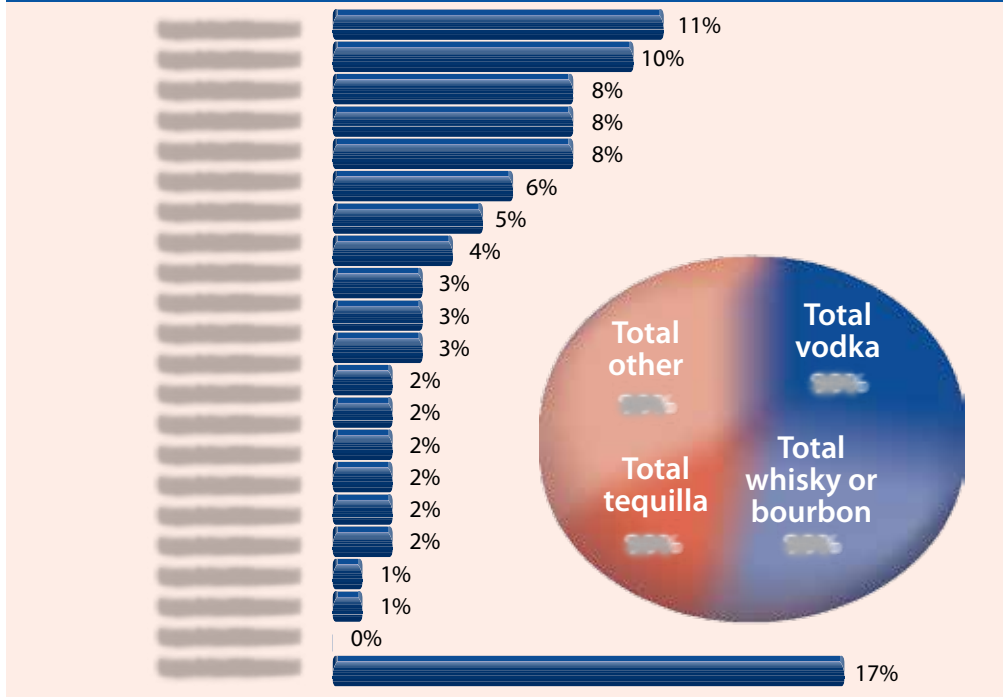


Beverage Brand Preferences

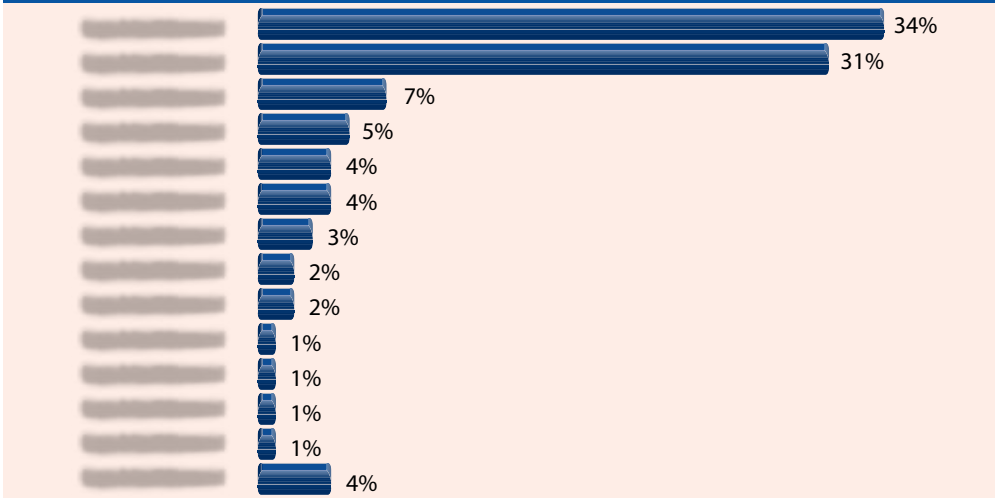
Beer brand drink most often (among beer drinkers)



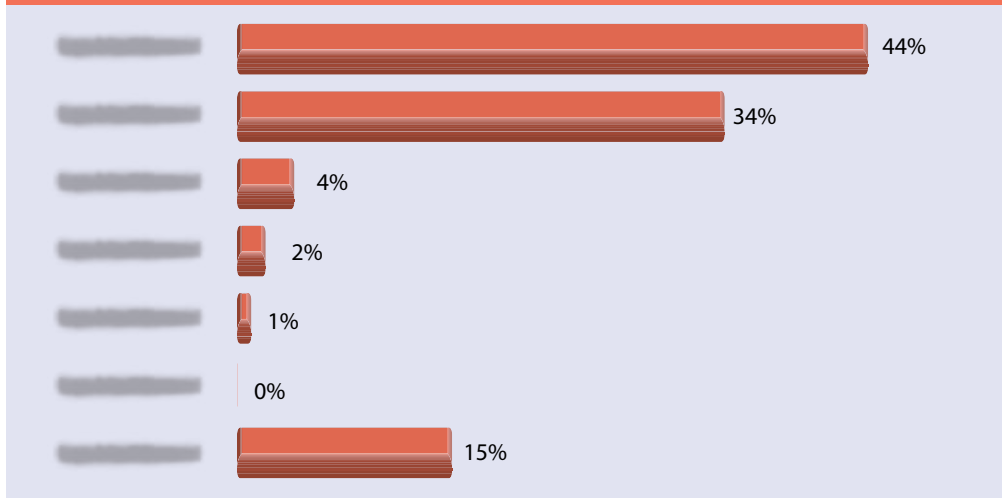
Preferred liquor or spirits brand (among liquor drinkers)



Soda brand drink most often (among soda drinkers)

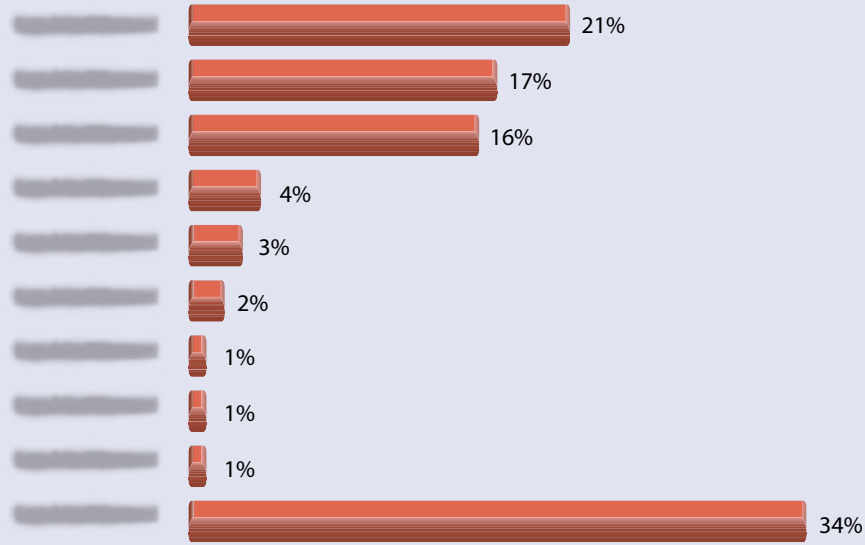


Preferred energy drink brand (among energy drink consumers)

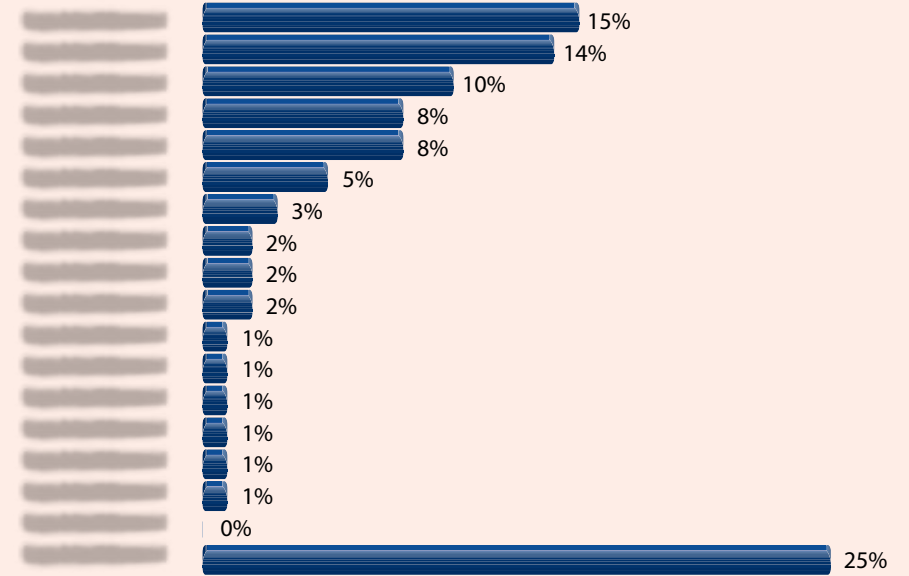


Other Brand Preferences

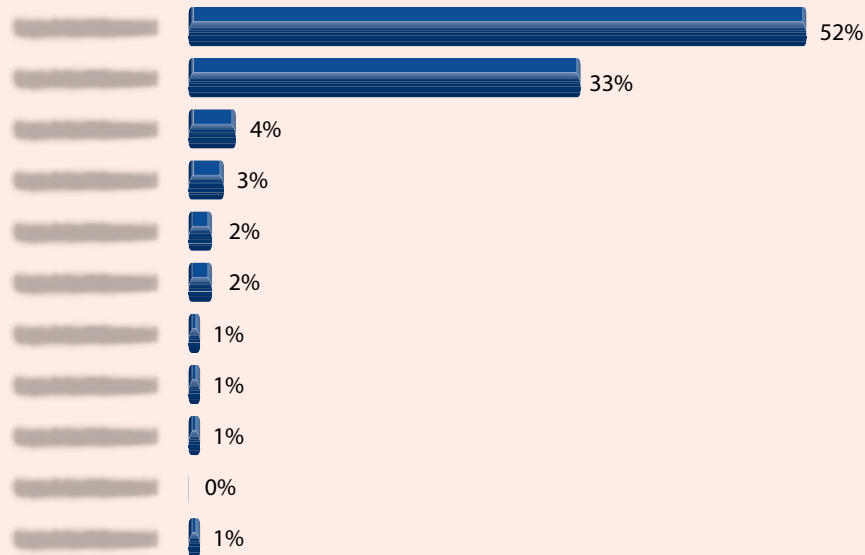
Bank use most often



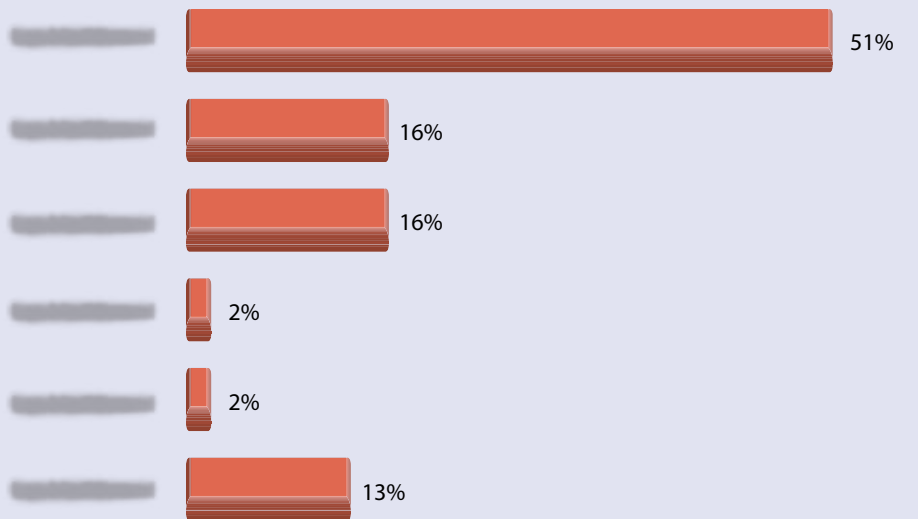
Auto insurance company



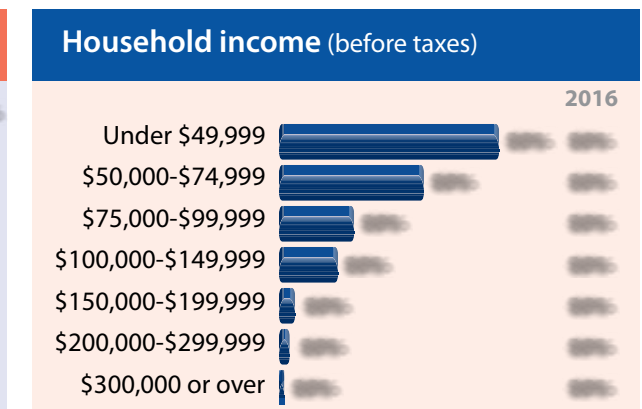
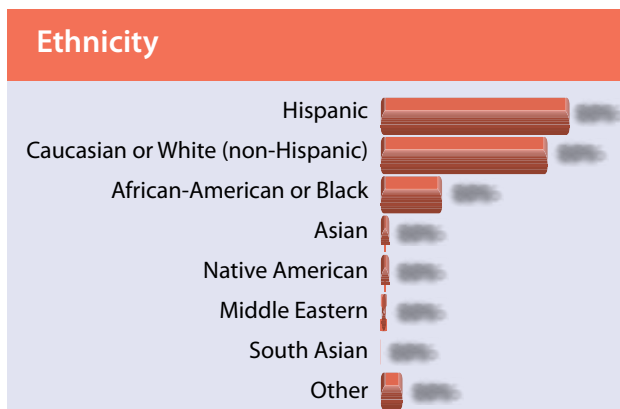
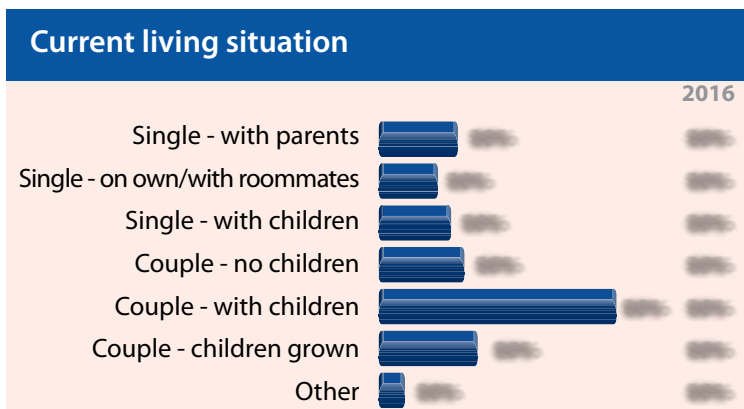
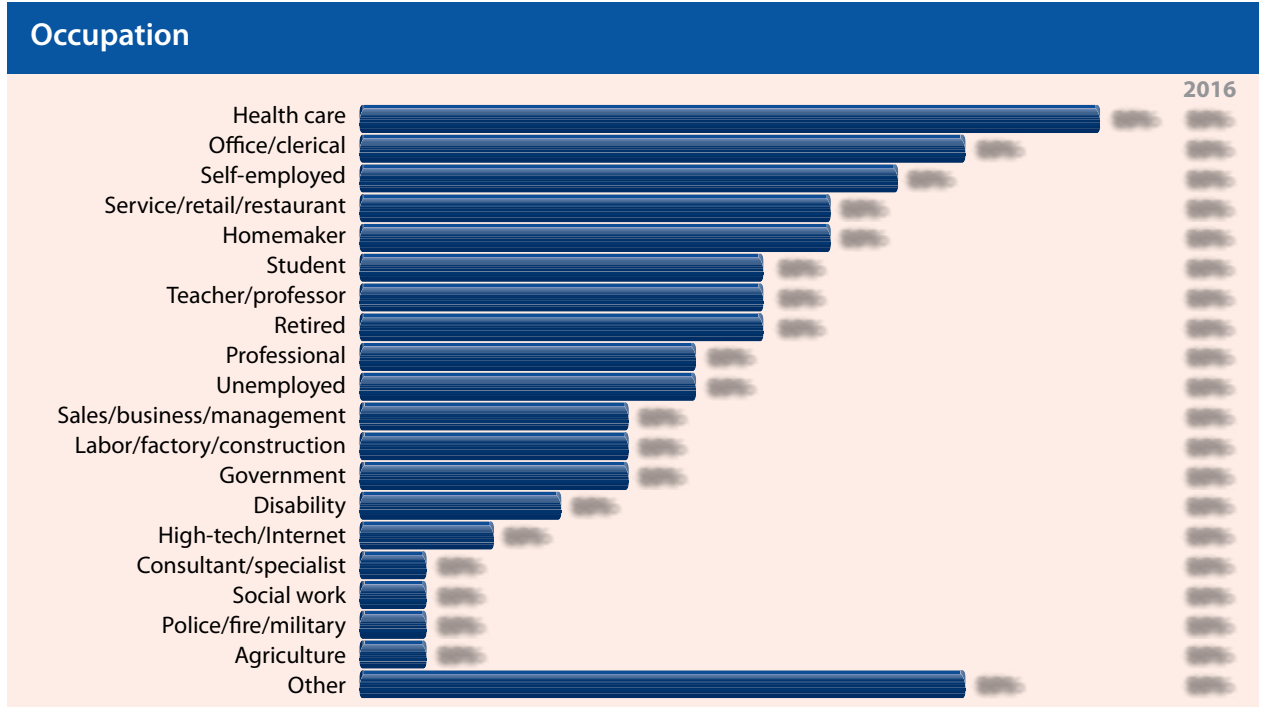
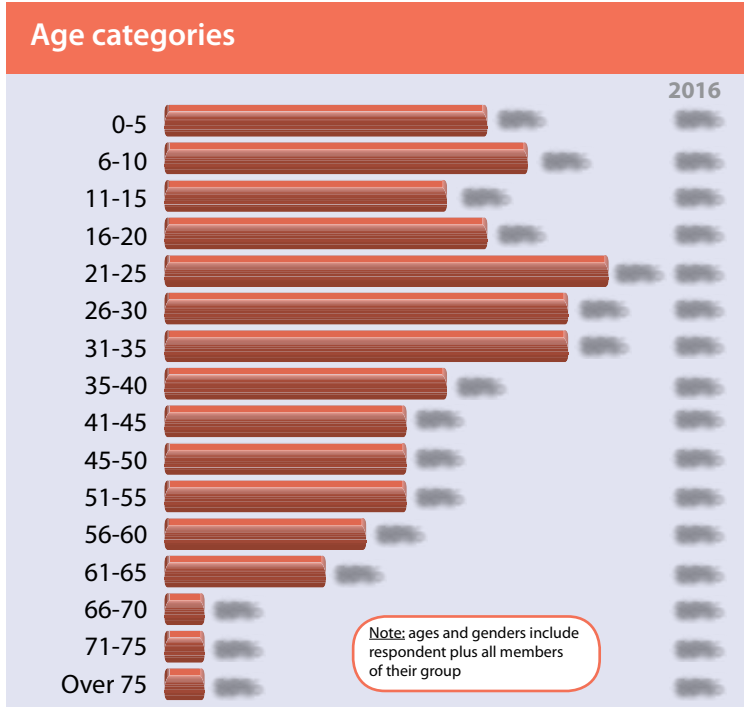
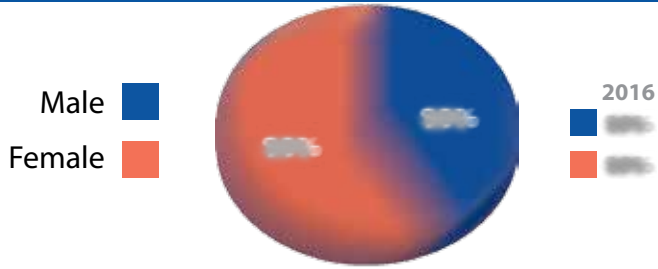
Preferred US airline (among those flying within 30 days)



Preferred cigarette brand (among smokers)



Demographics of Attendees

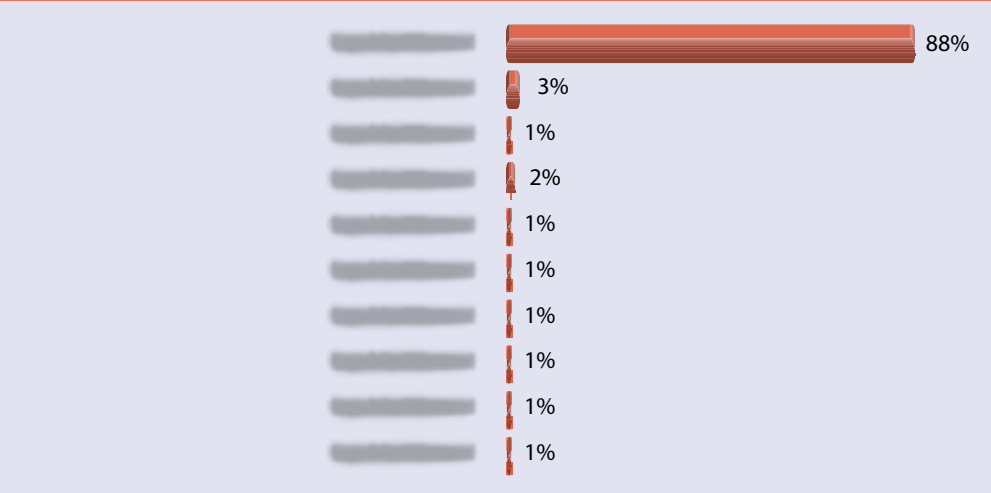


Estimated attendance

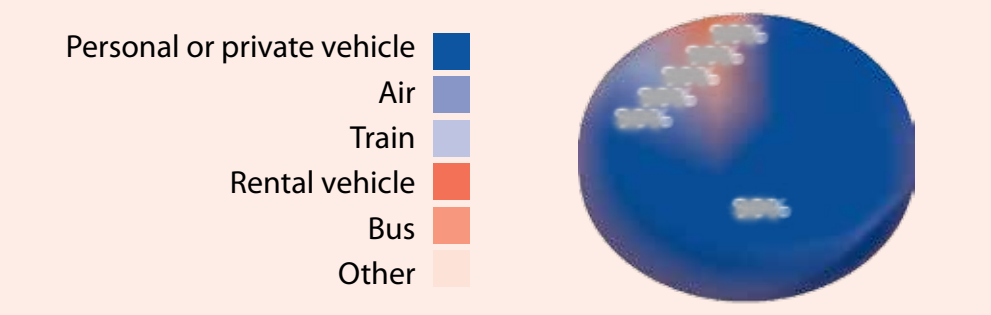
	2017	2016
Total person-visits (from published attendance)		
Average visits per person		
Estimated unique attendees		
Total locals (Dallas-Fort Worth-Arlington)		
Total non-locals (outside Dallas-Fort Worth-Arlington)		
Estimated unique attendees		

Average nights stayed (all non-locals)		
Attendee hotel/motel room nights		

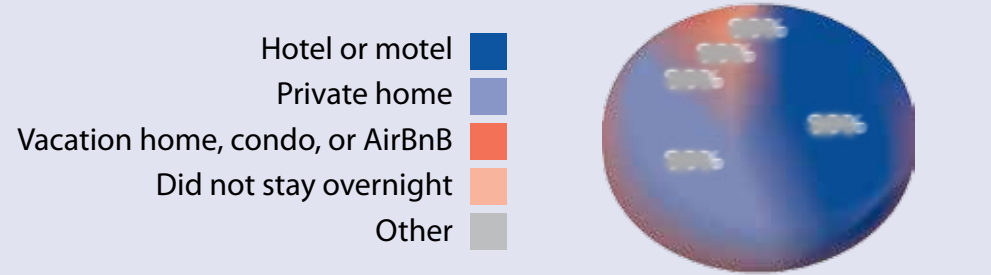
Place of residence (among non-locals)



Transportation to region (among non-locals)



Accommodations in region (among non-locals)



Economic Impact of Attendees



	2017	2016				
Total spending by non-locals			Spending by non-local attendees		Spending by local attendees (not economic impact)	
Economic impact (Industry output)			Shopping and retail		Shopping and retail	
Direct and indirect			Admission tickets and rides		Admission tickets and rides	
Induced			Concessions at fair		Concessions at fair	
Total employment supported (full-year job equivalents)			Accommodations		Parking and fuel	
Total taxes supported			Restaurants outside fair site		Restaurants outside fair site	
Federal			Parking, fuel, and repairs		Retail clothing	
State			Groceries		Public transit or taxis	
Local			Other entertainment		Ride share services	
			Retail clothing		Total spending by locals	
			Public transit or taxis			
			Ride share services			
			Car rentals			
			Total spending by non-locals			

Comments from Attendees

PREVIEW
VERSION

"Build an app to use in place of food and ride coupons."

"Great fireworks during Illumination Sensation show."

"I am from Puerto Rico and the Fair helped me have a happy day after the hurricane Maria."

"I just relocated from California and the Fair is the best I've experienced. The lights were breathtaking and the workers so courteous and warm."

"I just want to thank everyone who puts this together because y'all are the best! So many memories and memories in the making."

"I love the atmosphere of the fair, the cooler weather, smells of foods and nature and sounds of the crowd. It's very soothing and I love to watch people!"

"I love the changes at the fair: the new Texas theme, lights in the park, and parade too."

"I miss the bird show. I like the replacement show but not as much."

"I wish people working there would get more training. I was lied to and cursed at by one of the booth workers. It was a horrible experience especially in front of my kids."

"Keep the TX-OU game there!"

"Loved the extreme sports at the Fair!!"

"My mom won in 2 categories in the creative arts competition!"

"Please do not allow the Chinese junk shops to have space in the craft tents."

"Riding the DART is the only way to go to the Fair! Doing this made the experience 100% better!"

"Shiner Bock Beer is made in Texas and should not be sold as 'Imported Beer!'"

"The State Fair was our first date and have attended every year for 26 years except last year when I had a broken knee cap!"

"This was my 64th year. If I had to choose between the Fair and Christmas, I would choose the Fair!"

"We appreciated the time we went. My husband just lost his mother and enjoyed the memories of going with her."

"We drive to Dallas from Missouri every year just for the fair! Thanks for keeping it safe for families to enjoy."

"We had the same amount of people and we do the same thing each year. But this year we spent more money on coupons!"



Enigma Independent Event Audits provide unbiased data for senior marketers. Leading event marketing brands subscribe to confidential reports. Event promoters and marketing agencies are not involved in the data collection. Unauthorized copying or distribution is strictly prohibited.

Survey technique

Survey method	Unbiased, online post-event survey
Field dates	One week commencing Sunday evening
Sampling method	Proprietary algorithm featuring targeted pay-per-click ads and other databases
Sample size	Approximately 1000 respondents
Incentive for respondents	\$200 Visa gift card

Verification

- Skill-testing questions at end of survey verify actual attendance
- Names and email addresses of respondents collected
- Subscribers may request skill-testing response data or email lists for independent verification

About Enigma Research Corporation®

- World's leading event research firm
- Approximately 1000 events surveyed since 1993
- Offices in New York, Toronto, and Santa Monica

Other Enigma Independent Event Audits

- No list of events is publicly distributed. Consultants must be contacted for a list of scheduled events.

