

ENIGMA INDEPENDENT EVENT AUDITS

Unbiased Intelligence for Senior Marketers

2016 STATE FAIR OF TEXAS

Dallas, Texas

September 30-October 23, 2016



enigma
research



CONFIDENTIAL

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Highlights

Most popular reasons for attending

- 1 To eat a meal or try new food
- 2 For midway rides and games
- 3 To see the auto and truck show

Most popular performers

- 1 Nelly
- 2 Ab Quintanilla
- 3 La Energia Nortena

Most recalled sponsors

- 1 Chevrolet
- 2 Ford
- 3 Mattress Firm

Most visited brand activations

- 1 Chevrolet Ride & Drive
- 2 Bank of America Construction exhibit
- 3 Kids' Boardwalk by McDonald's

Most appreciated brand activations

- 1 Dr Pepper tent
- 2 Kids' Boardwalk by McDonald's
- 3 Chevrolet Ride & Drive

Top on-site beverages consumed

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

Most visited Truck Zone exhibits

- 1 Chevrolet
- 2 Ford
- 3 Toyota

Preferred brands

- Auto insurance: State Farm
- Domestic airline: American Airlines
- Energy drink: Monster

Tourism and economic impact

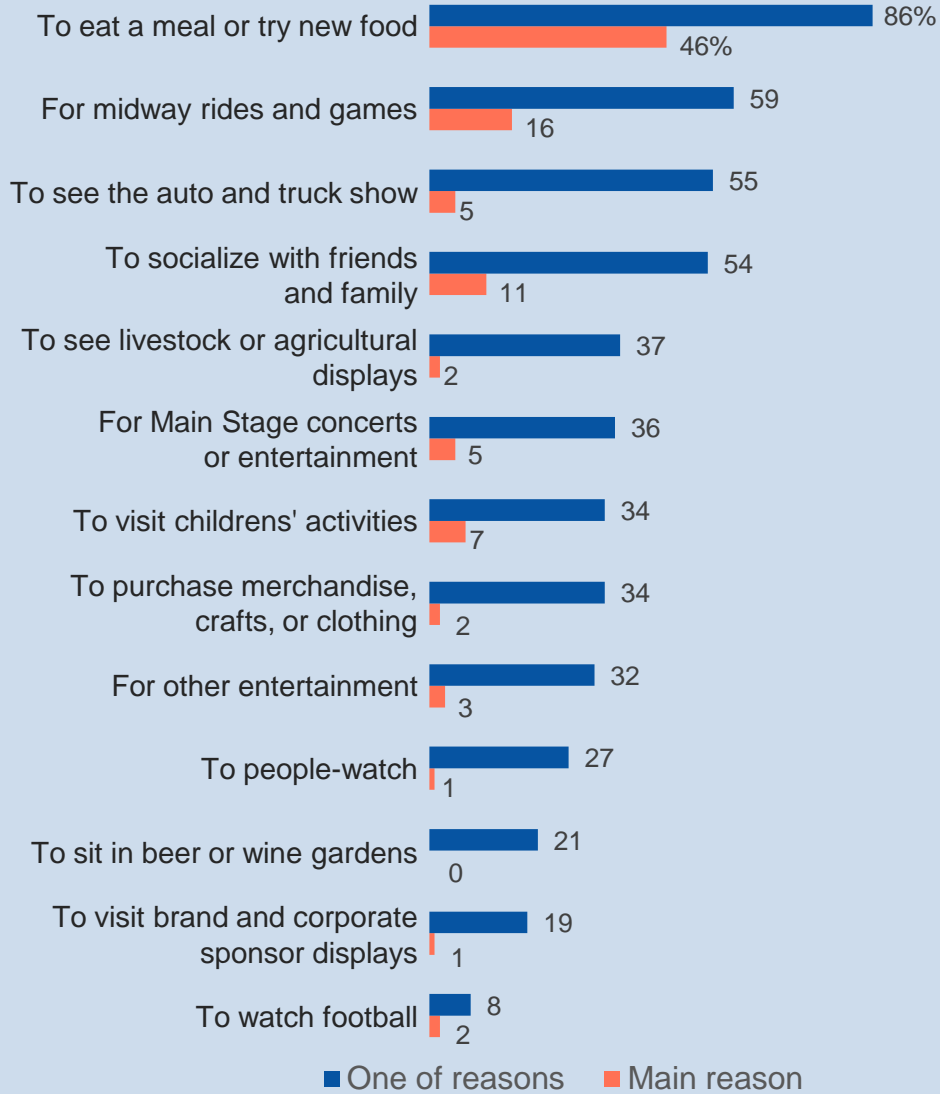
- Percentage non-local: 25%
- Estimated hotel room nights: 65,200
- Estimated economic impact: \$93.9M

Best comments

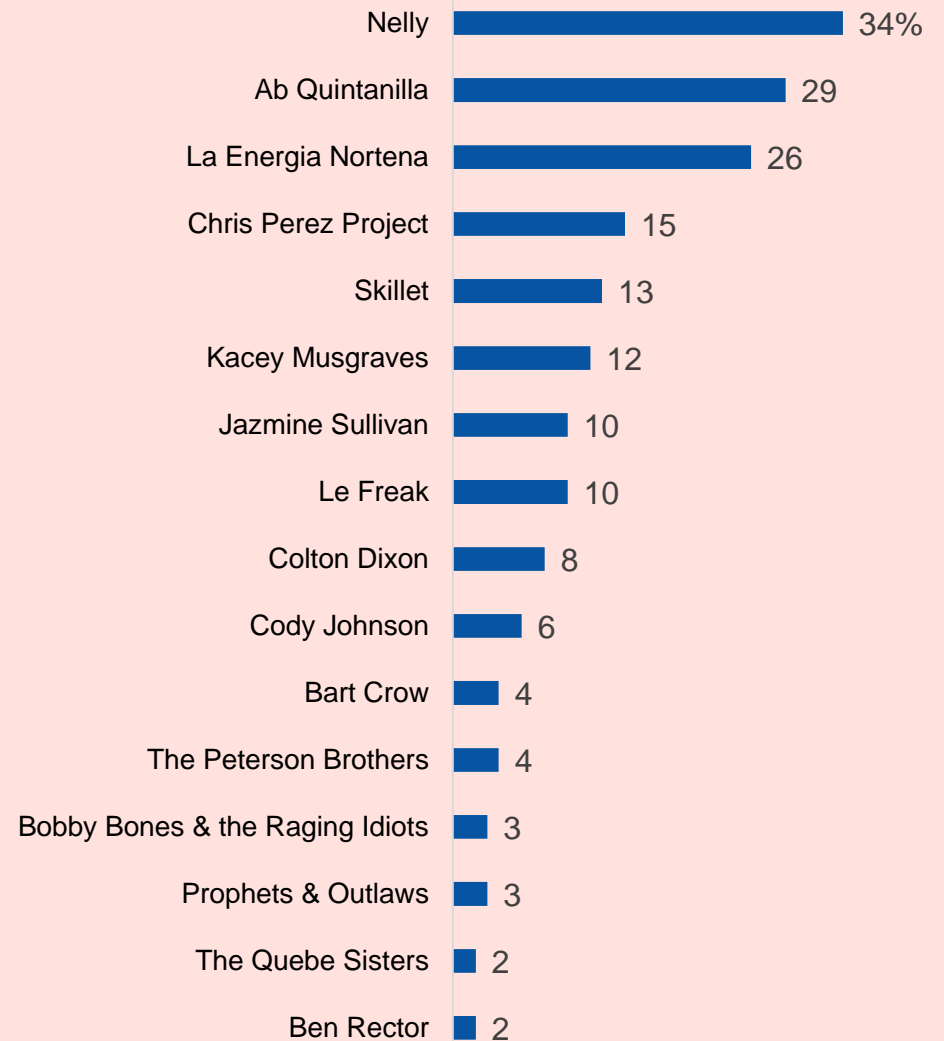
- "Been attending every year since I was a child. Our group even wears matching shirts!"
- "I really love the new wine and beer gardens and sitting areas."
- "I proposed in front of Big Tex!"

Event experience

Reasons for attending event (aided)

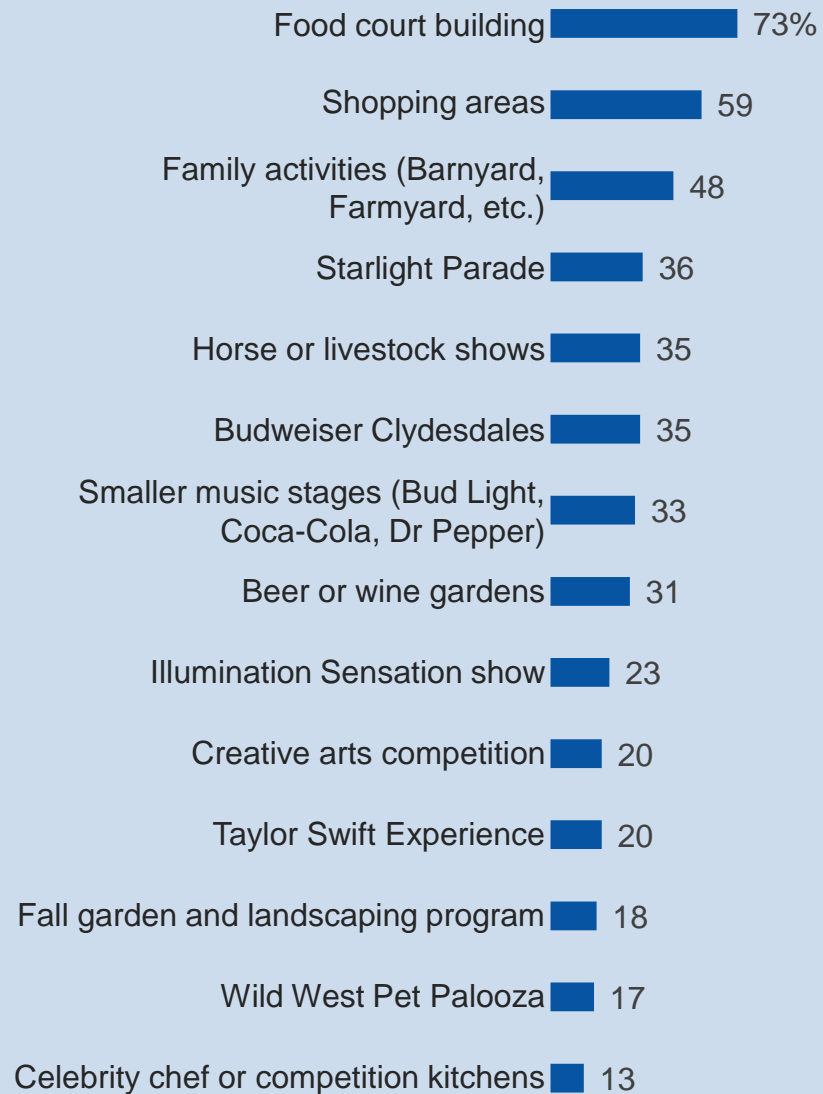


Main Stage performances watched (among those who watched Main Stage)



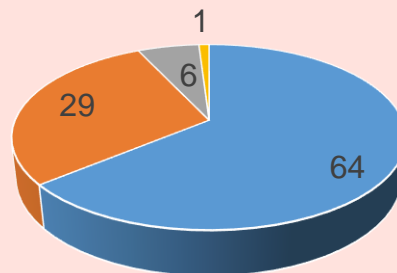
Event experience

Feature attractions visited

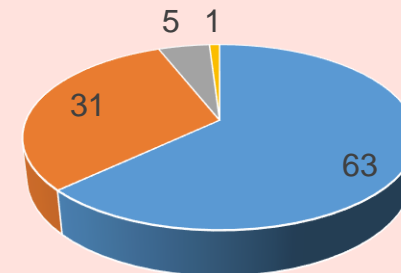


Event ratings

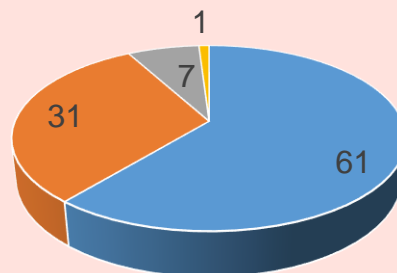
Variety of food and beverage



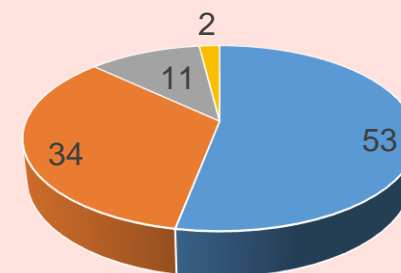
Quality of entertainment



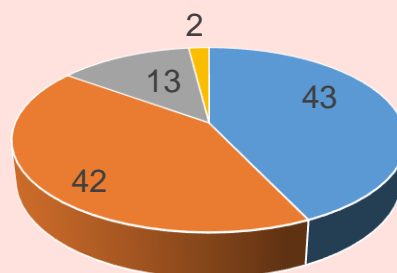
Variety of entertainment



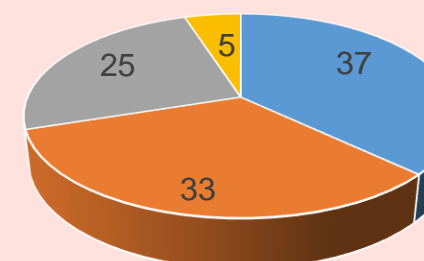
Quality of food and beverage



Cleanliness

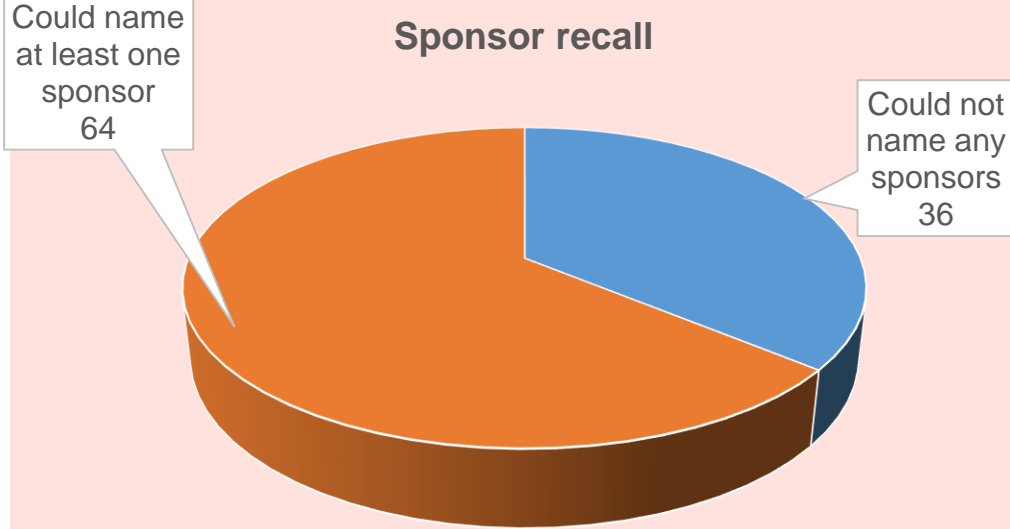


Value for admission price

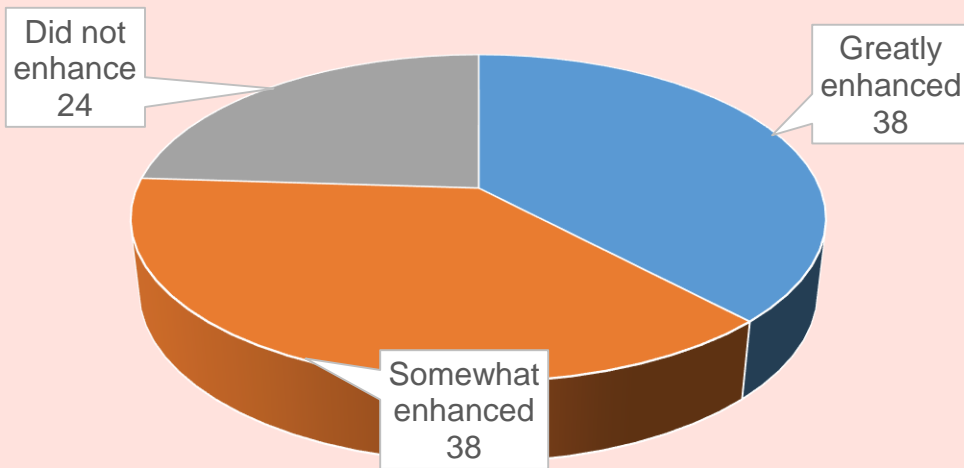


■ excellent ■ good ■ fair ■ poor

Sponsor recall and appreciation

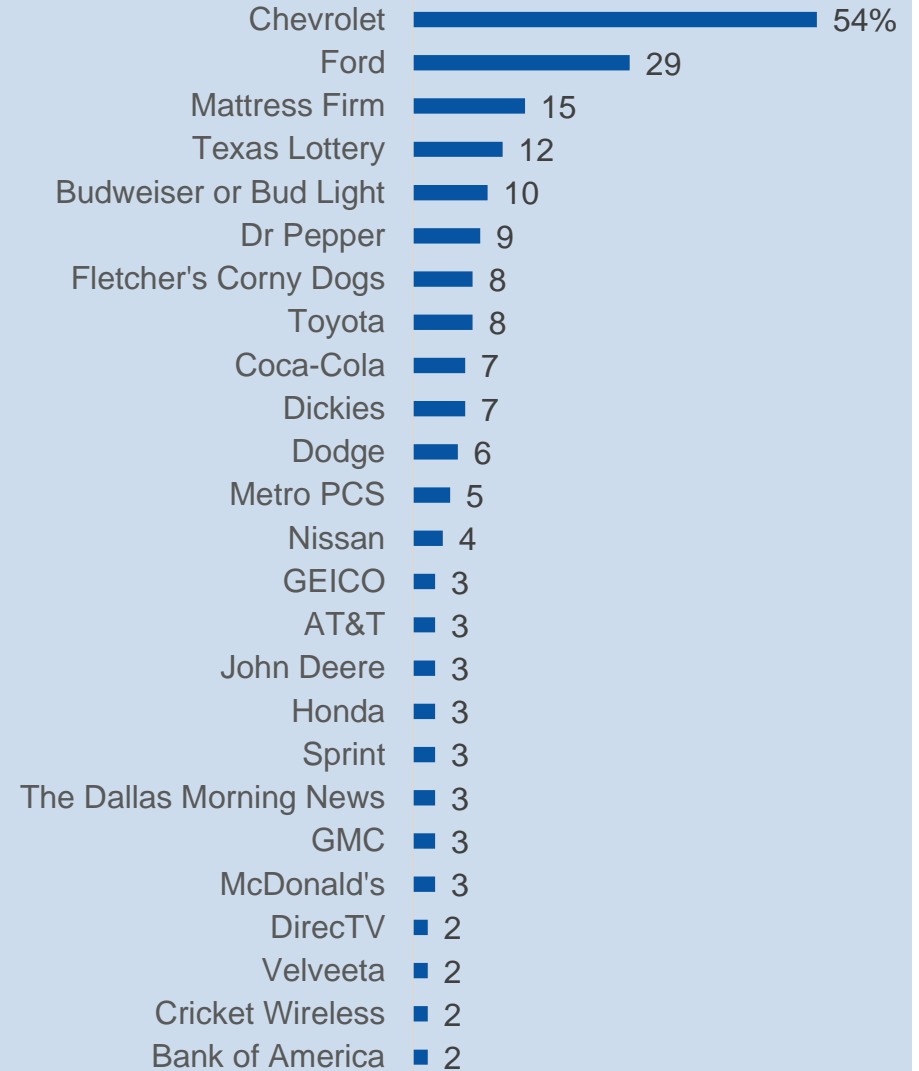


Extent to which brands and sponsors enhanced experience



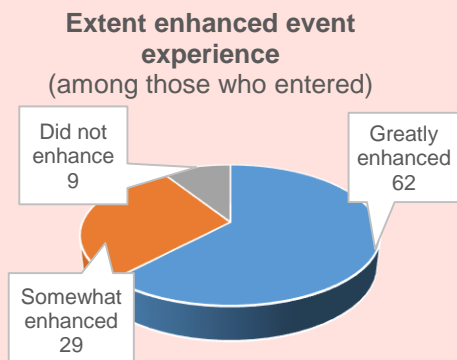
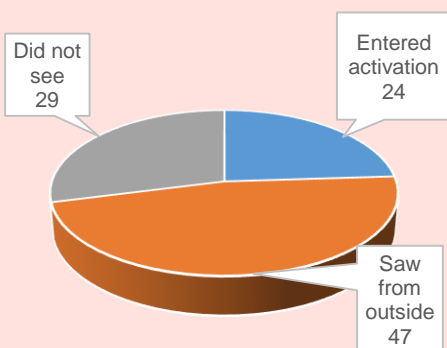
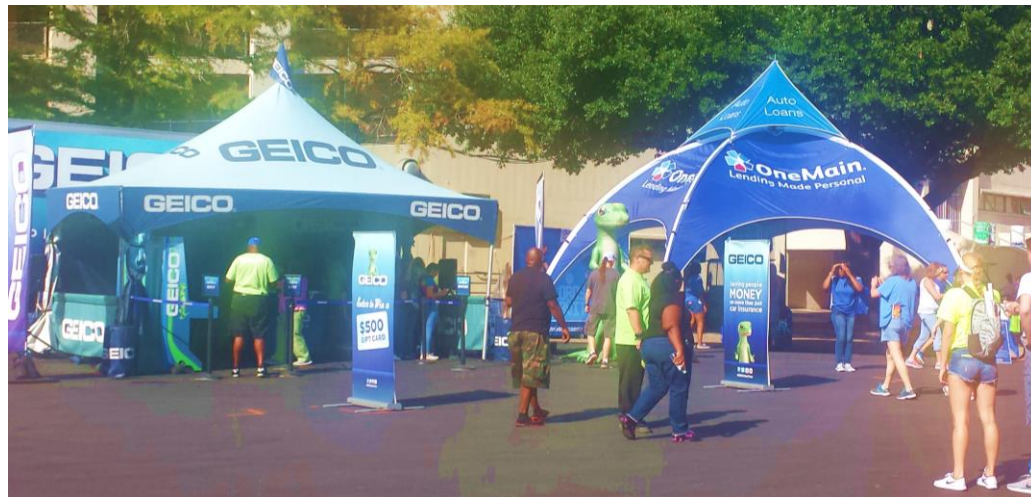
Sponsor recall

(top 3 unaided among those who could recall sponsors)

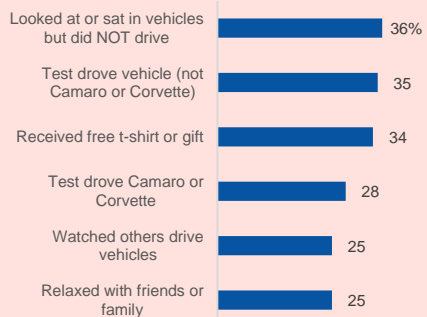


Brand activation evaluations

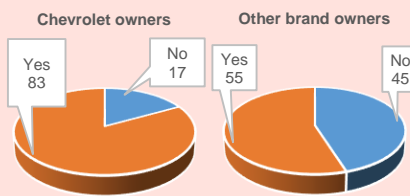
Chevrolet Ride & Drive



Activities participated (among those who entered)



More likely to purchase a Chevrolet vehicle than before the fair (among those who entered)



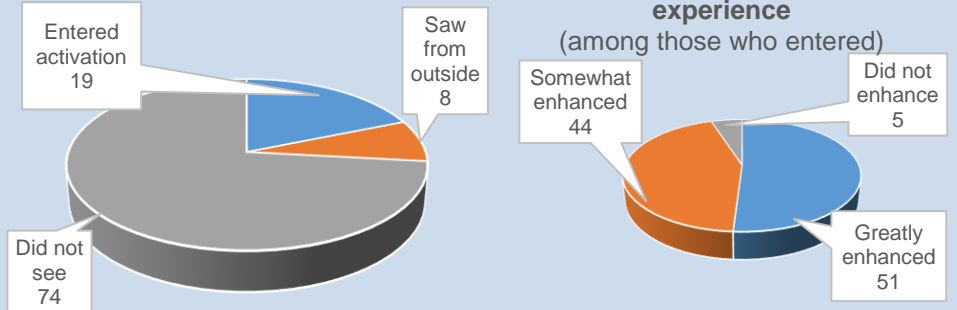
Brand activation evaluations

Bank of America Construction exhibit

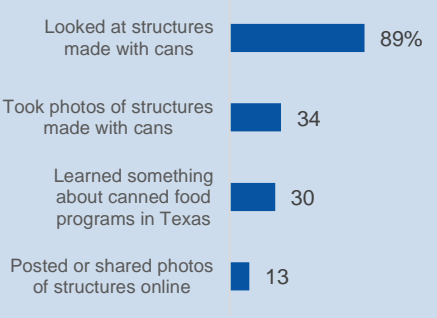


Rank Participation: 2 of 5
Enhancement: 4 of 5

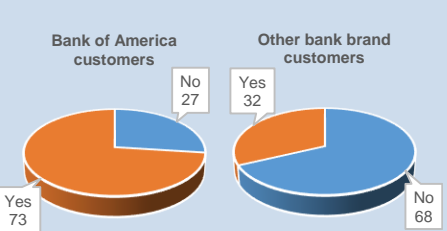
Extent enhanced event experience (among those who entered)



Activities participated (among those who entered)



More likely to conduct business with Bank of America than before the fair (among those who entered)

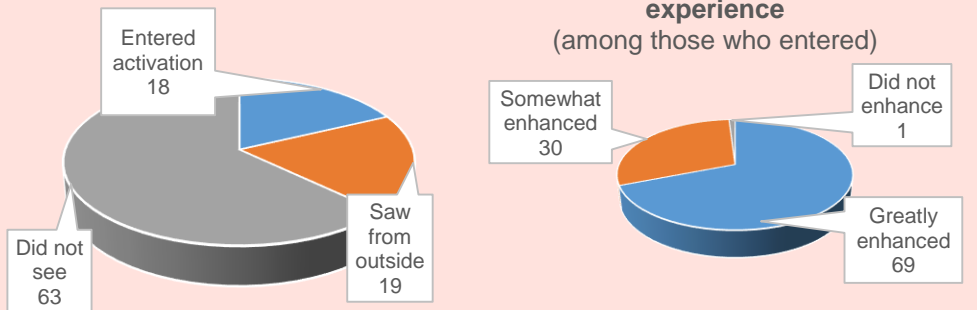


Kids' Boardwalk sponsored by McDonald's

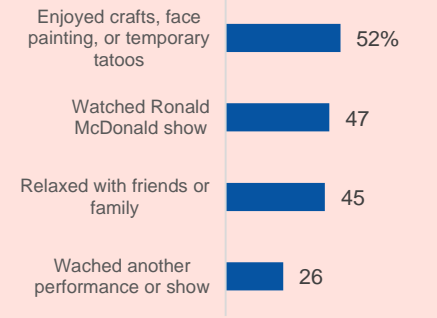


Rank Participation: 3 of 5
Enhancement: 2 of 5

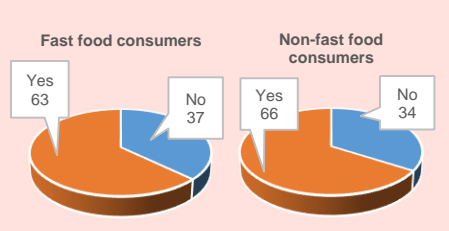
Extent enhanced event experience (among those who entered)



Activities participated (among those who entered)



More likely to visit a McDonald's restaurant than before the fair (among those who entered)

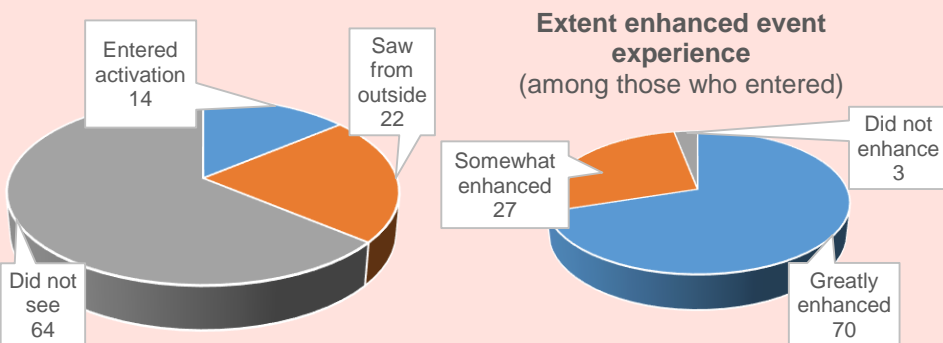


Brand activation evaluations

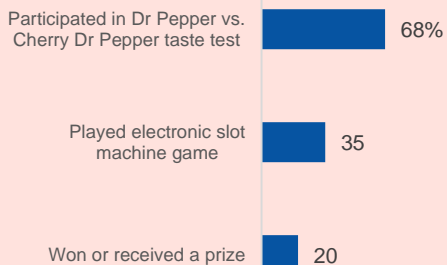
Dr Pepper tent



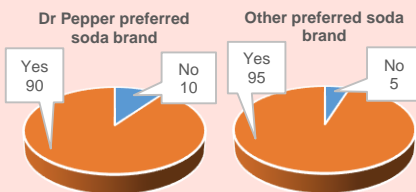
Rank Participation: 4 of 5
Enhancement: 1 of 5



Activities participated (among those who entered)



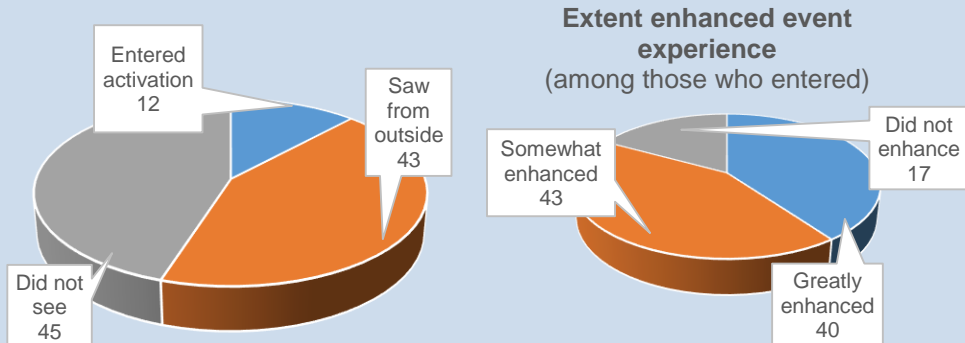
More likely to purchase Dr Pepper than before the fair (among those who entered)



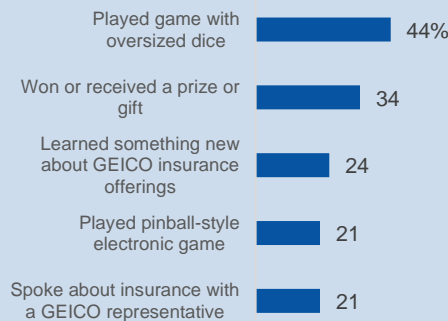
GEICO Tent



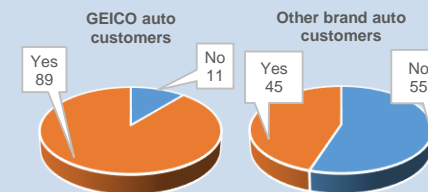
Rank Participation: 5 of 5
Enhancement: 5 of 5



Activities participated (among those who entered)

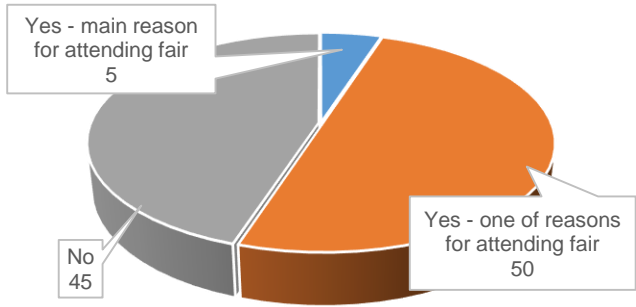


More likely to purchase insurance from GEICO than before the fair (among those who entered)

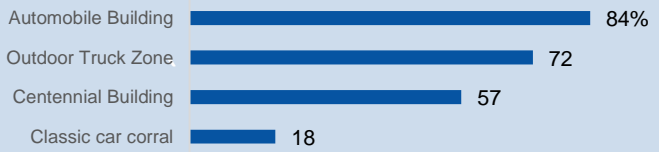


Auto and truck show

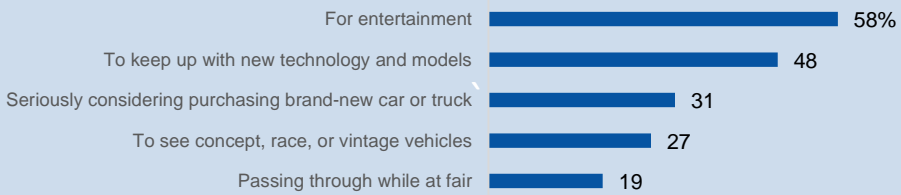
Attended Auto and Truck Show



Sections of show visited (among show visitors)



Reasons for visiting Auto and Truck Show (among show visitors)



Next brand-new vehicle purchase (among those seriously considering)



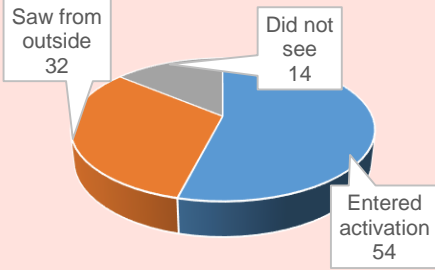
Outdoor Truck Zone exhibit evaluations

Chevrolet Truck Exhibit

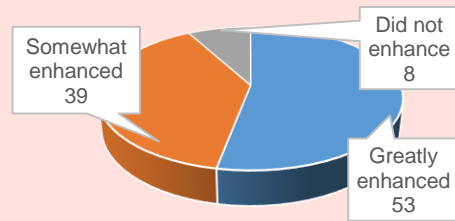


Rank Participation: 1 of 6
Enhancement: 2 of 6

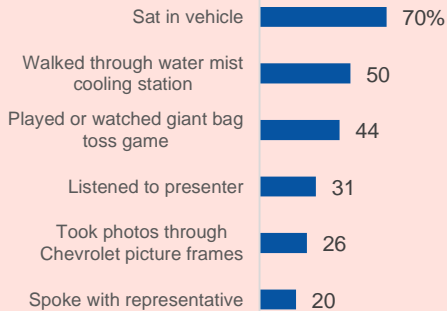
Participation (among show visitors)



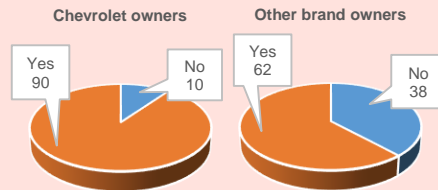
Extent enhanced event experience (among those who entered)



Activities participated (among those who entered)



More likely to purchase a Chevrolet vehicle than before the fair (among those who entered)

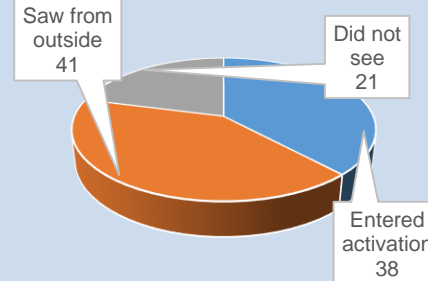


Ford Truck Exhibit

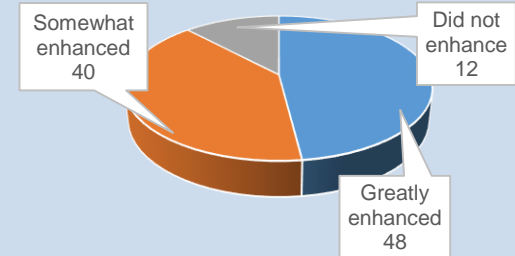


Rank Participation: 2 of 6
Enhancement: 4 of 6

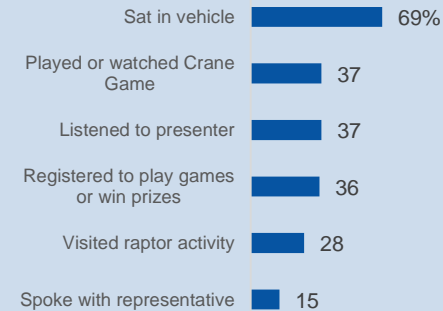
Participation (among show visitors)



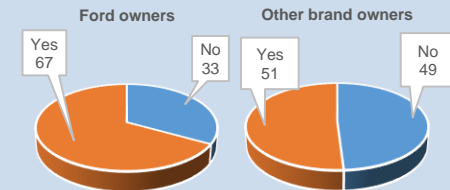
Extent enhanced event experience (among those who entered)



Activities participated (among those who entered)



More likely to purchase a Ford vehicle than before the fair (among those who entered)



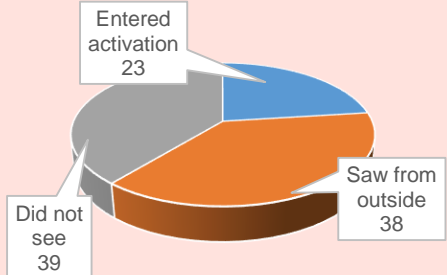
Outdoor Truck Zone exhibit evaluations

Toyota Truck Exhibit

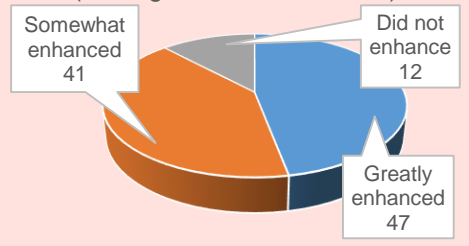


Rank Participation: 3 of 6
Enhancement: 5 of 6

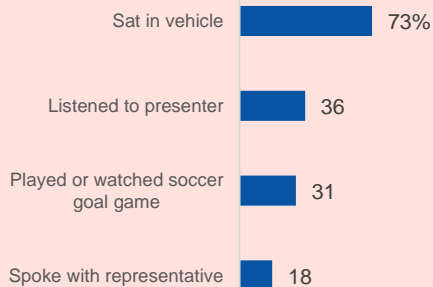
Participation (among show visitors)



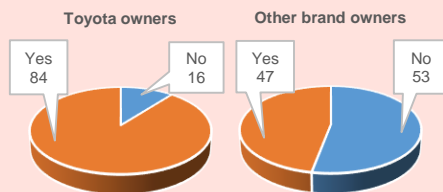
Extent enhanced event experience (among those who entered)



Activities participated (among those who entered)



More likely to purchase a Toyota vehicle than before the fair (among those who entered)

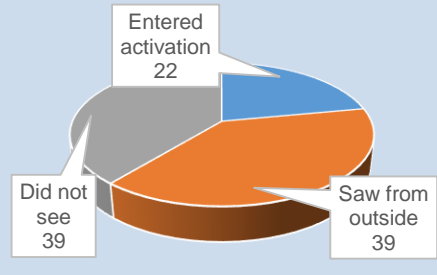


GMC Truck Exhibit

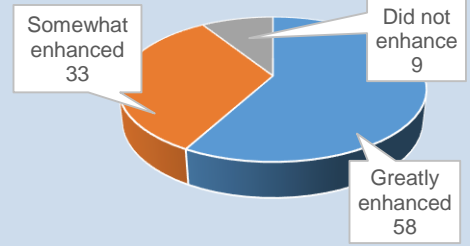


Rank Participation: 4 of 6
Enhancement: 1 of 6

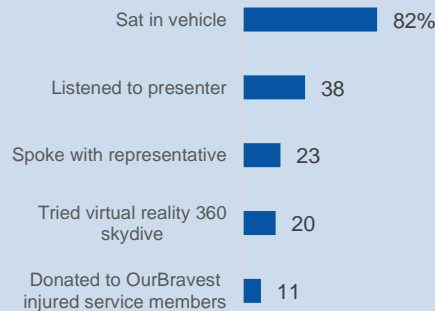
Participation (among show visitors)



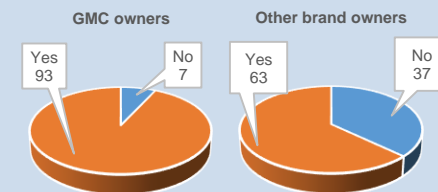
Extent enhanced event experience (among those who entered)



Activities participated (among those who entered)



More likely to purchase a GMC vehicle than before the fair (among those who entered)



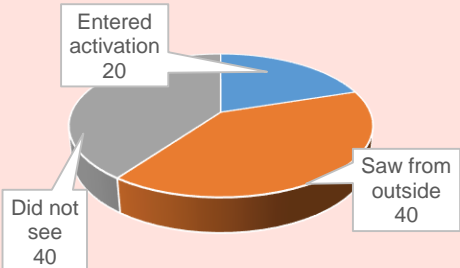
Outdoor Truck Zone exhibit evaluations

Nissan Truck Exhibit

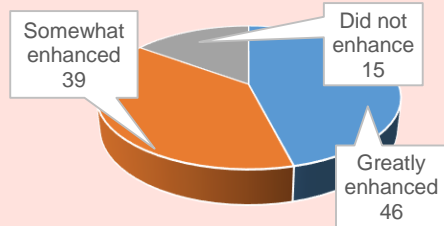


Rank Participation: 5 of 6
Enhancement: 6 of 6

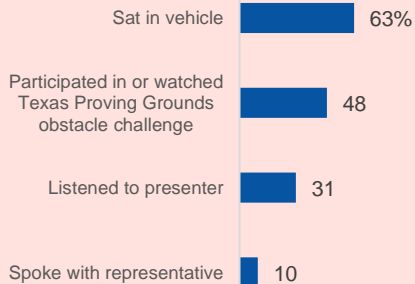
Participation
(among show visitors)



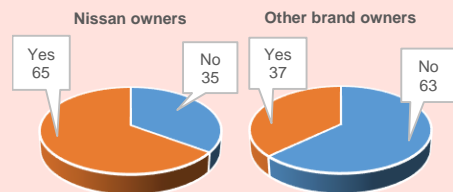
Extent enhanced event experience
(among those who entered)



Activities participated (among those who entered)



More likely to purchase a Nissan vehicle than before the fair (among those who entered)

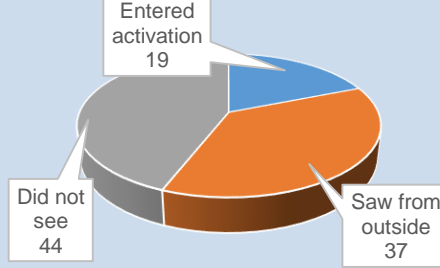


RAM Truck Exhibit

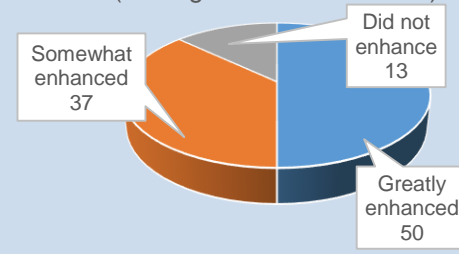


Rank Participation: 6 of 6
Enhancement: 3 of 6

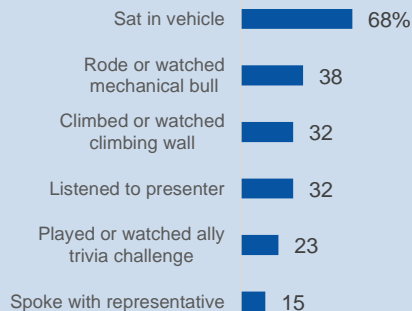
Participation
(among show visitors)



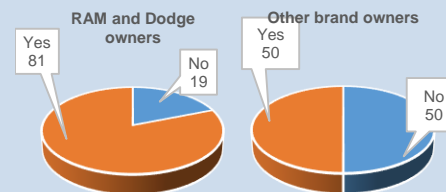
Extent enhanced event experience
(among those who entered)



Activities participated (among those who entered)



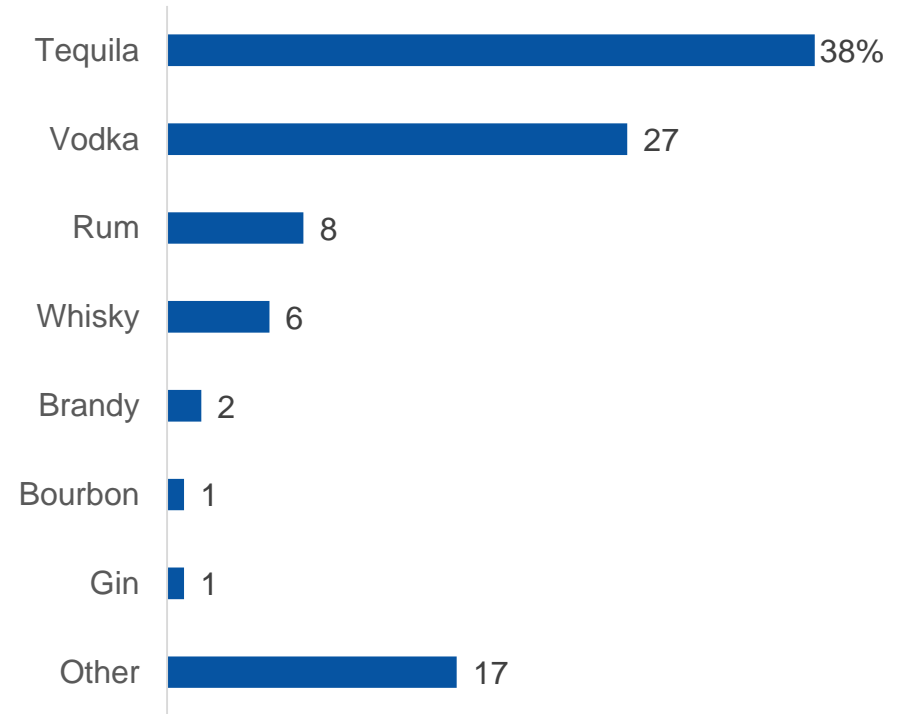
More likely to purchase a RAM vehicle than before the fair (among those who entered)



On-site beverage consumption

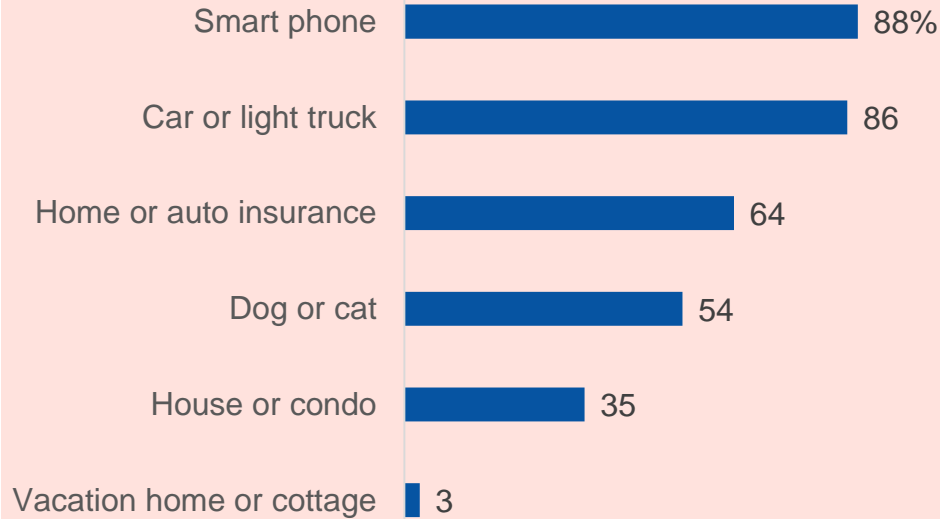
Beverages consumed on-site	Percentage consumed on-site	Average consumed at event (among consumers)
Soda or soft drinks	69%	2.6
Bottled or boxed water	64%	3.0
Beer	30%	2.9
Juice	11%	2.0
Liquor or spirits	11%	1.8
Wine or wine coolers	9%	1.9
Energy drinks	4%	1.7
Coffee or coffee drinks	3%	1.8
Other beverages	19%	2.4

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

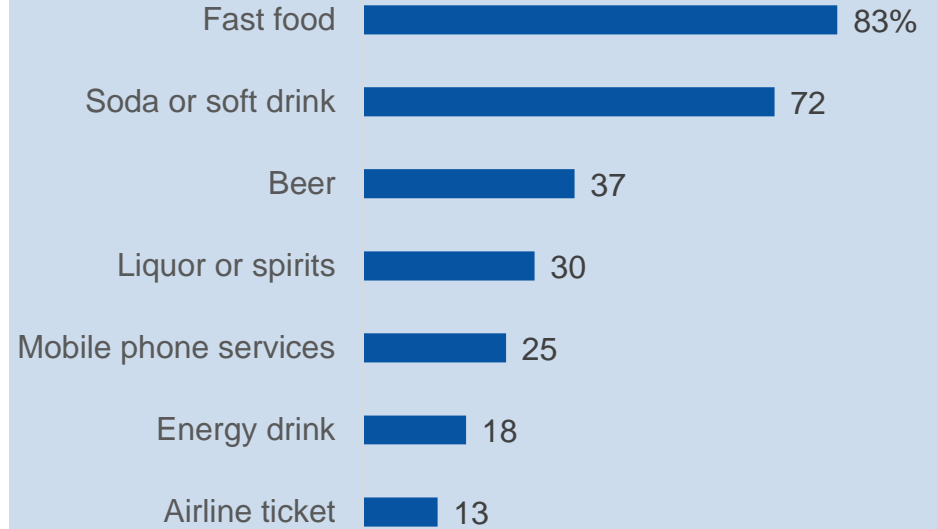


Product ownership and use

Product ownership

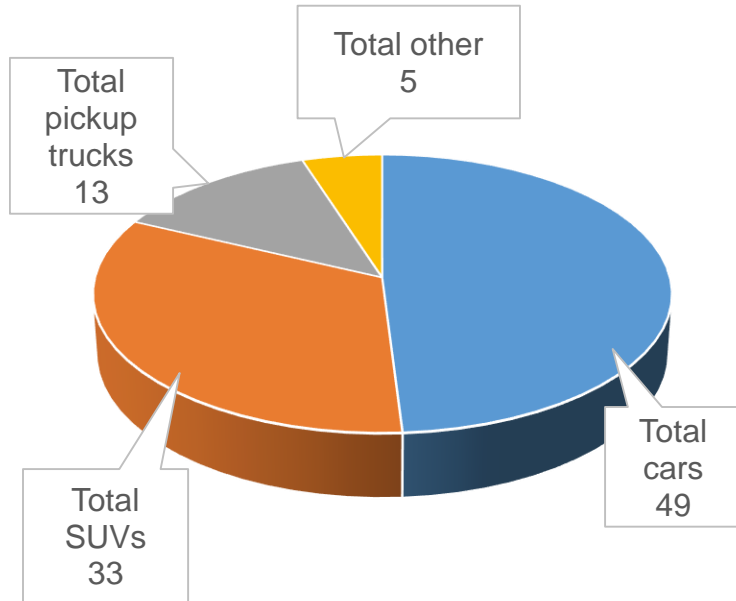
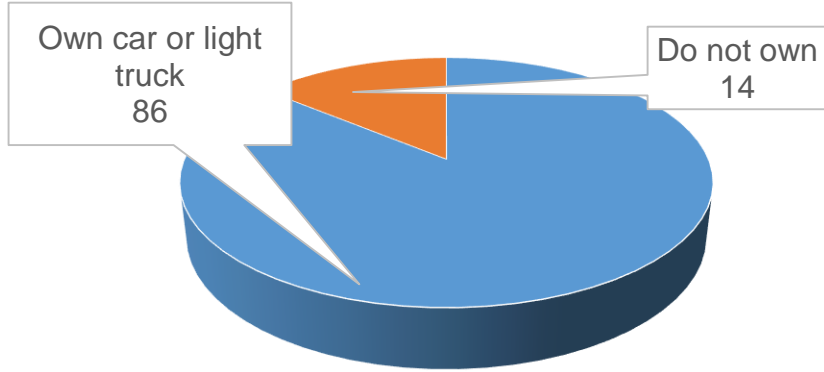


Products purchasing within next 30 days

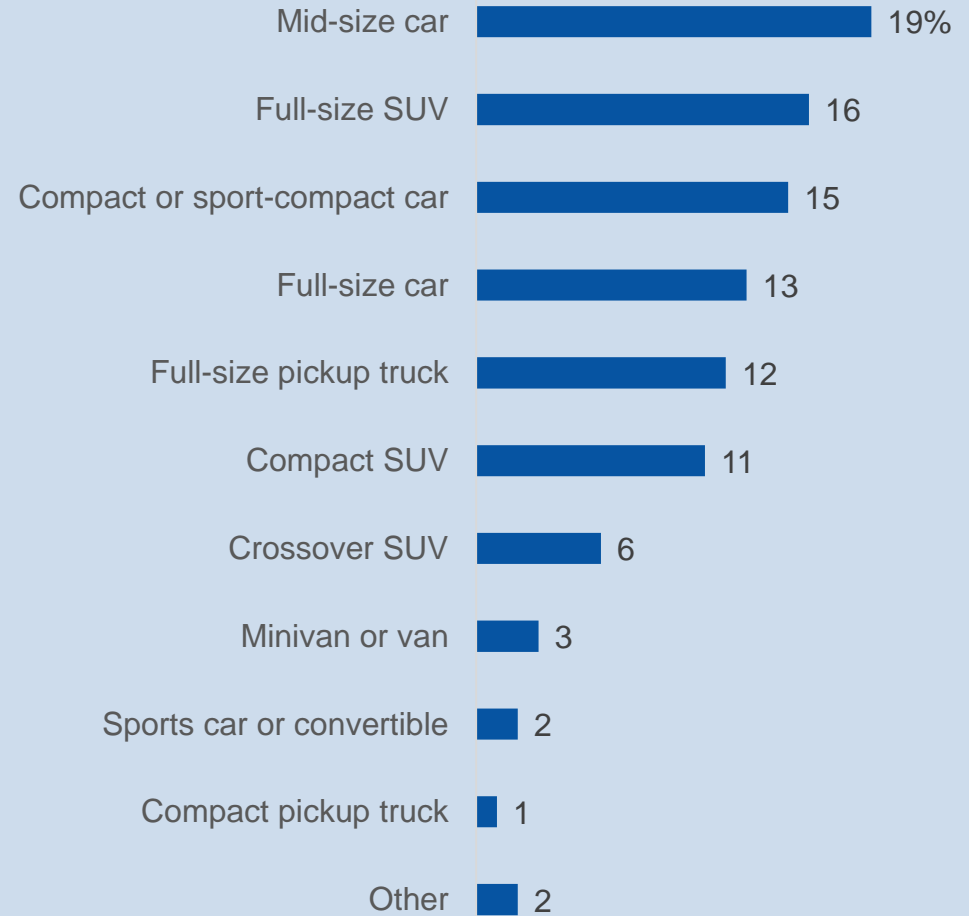


Vehicle preferences

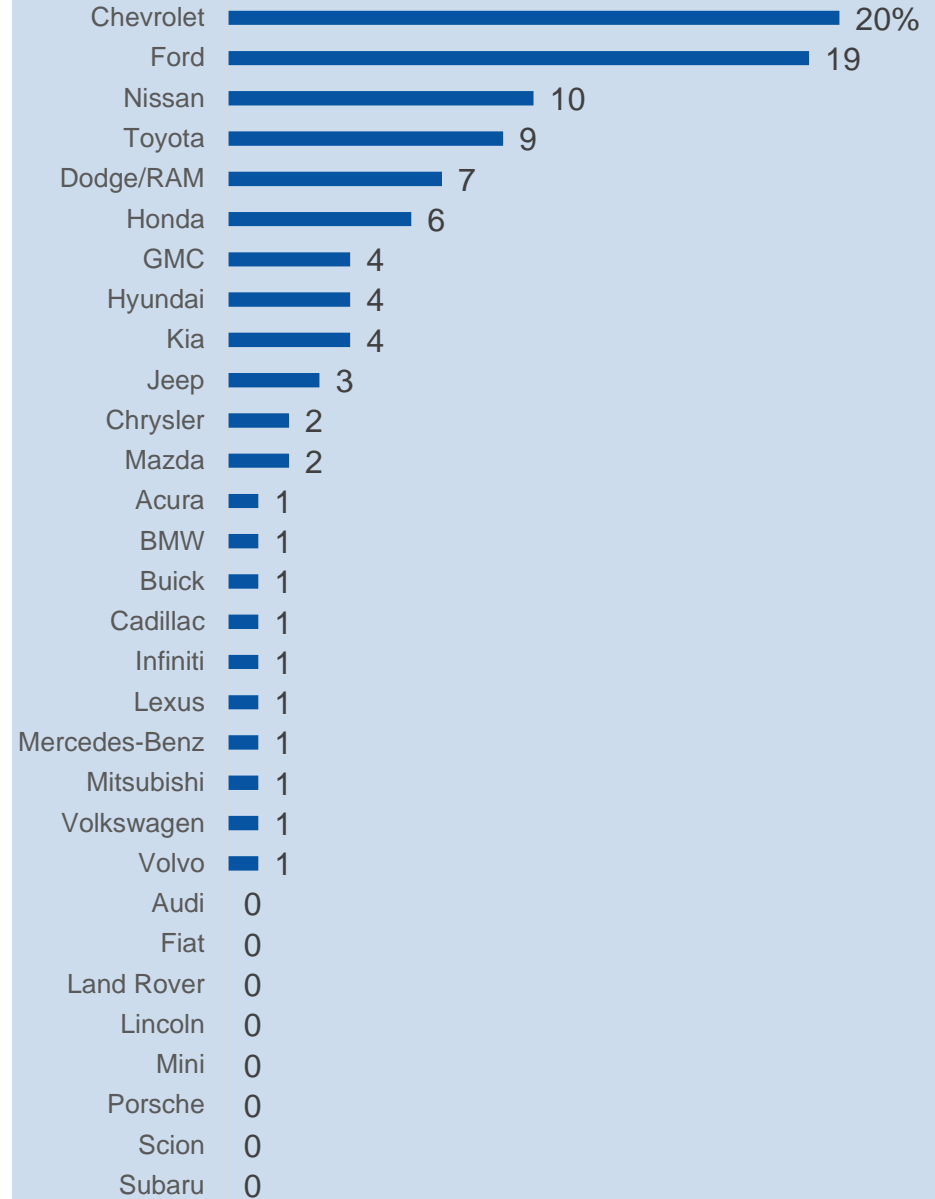
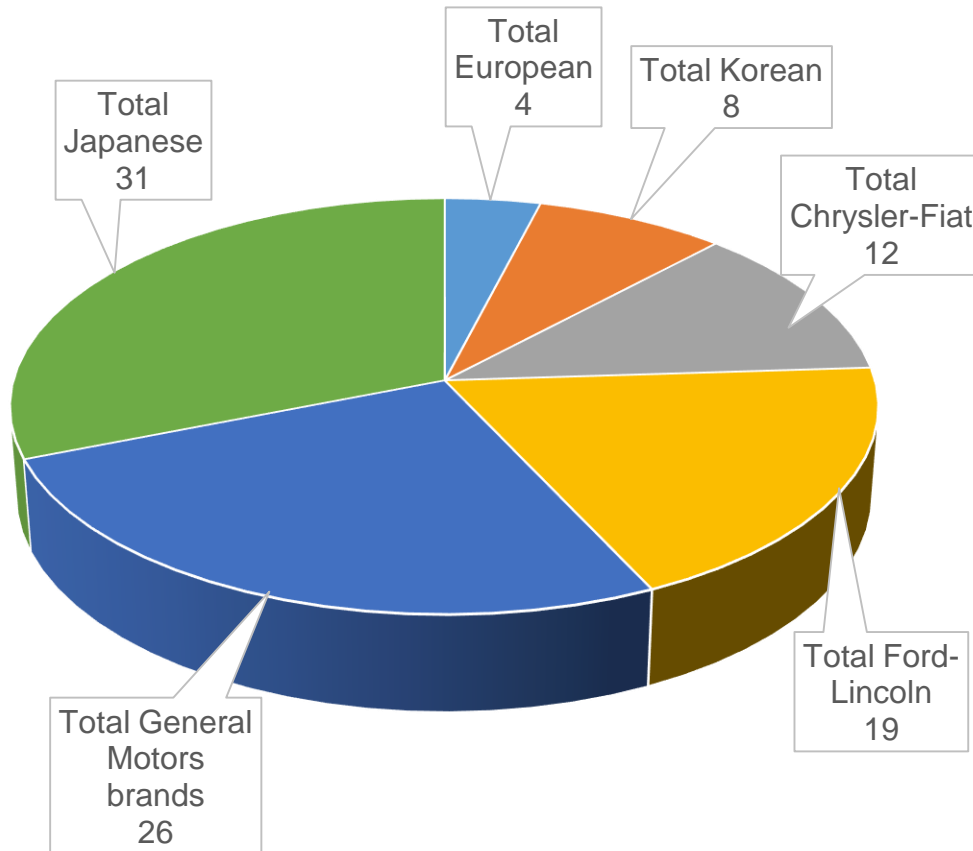
Vehicle ownership



Type of vehicle driven (among owners)

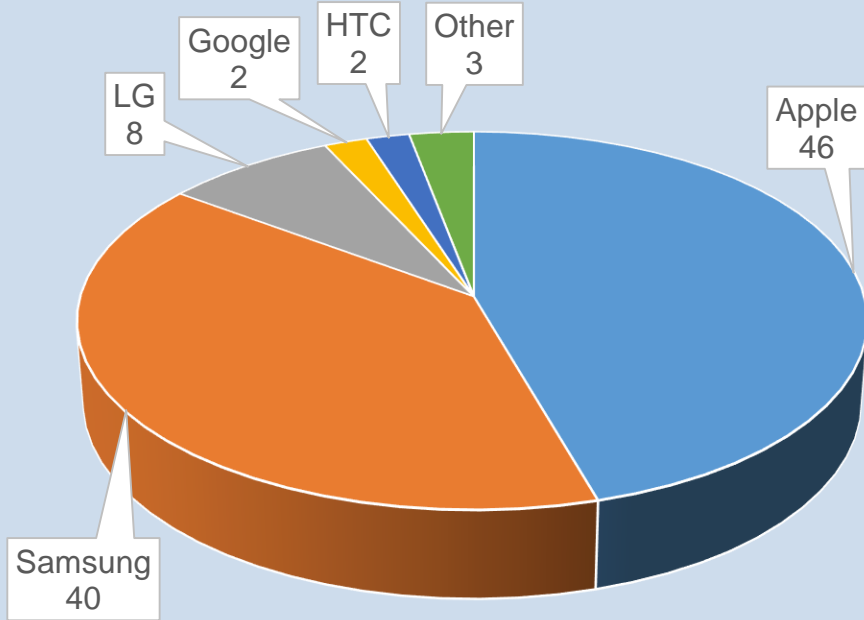


Brand of vehicle driven (among owners)

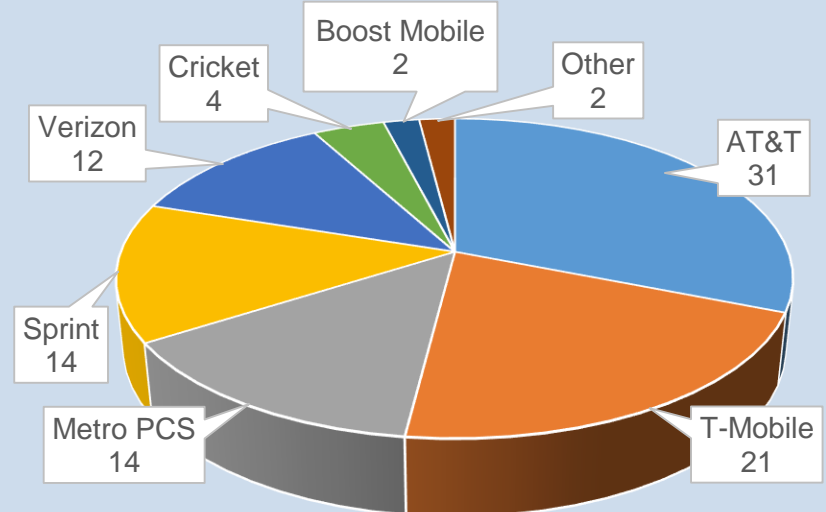


Telecommunications brand preferences

Smart phone or tablet use most often
(among owners)

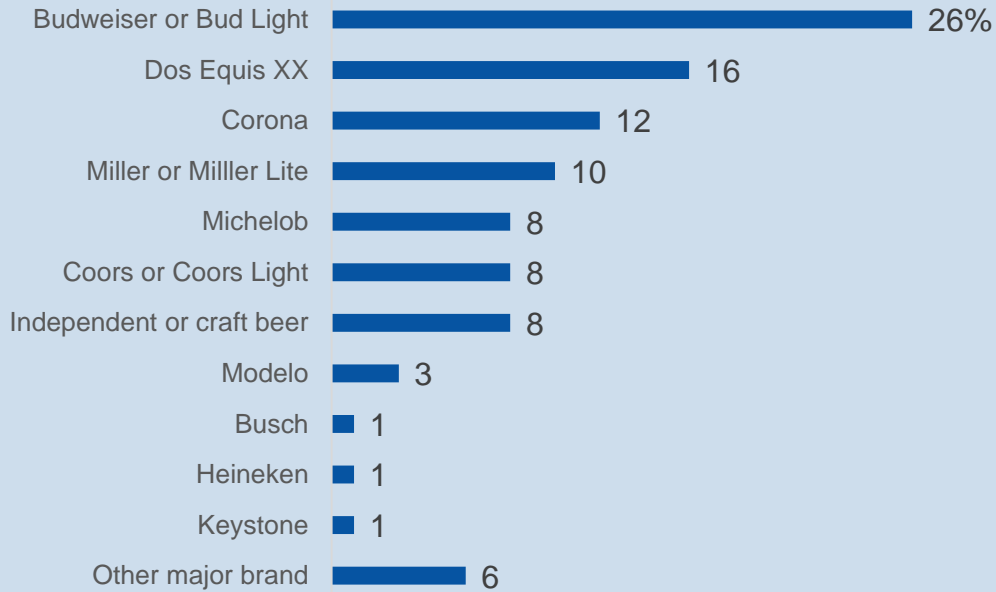


Wireless service provider
(among users)

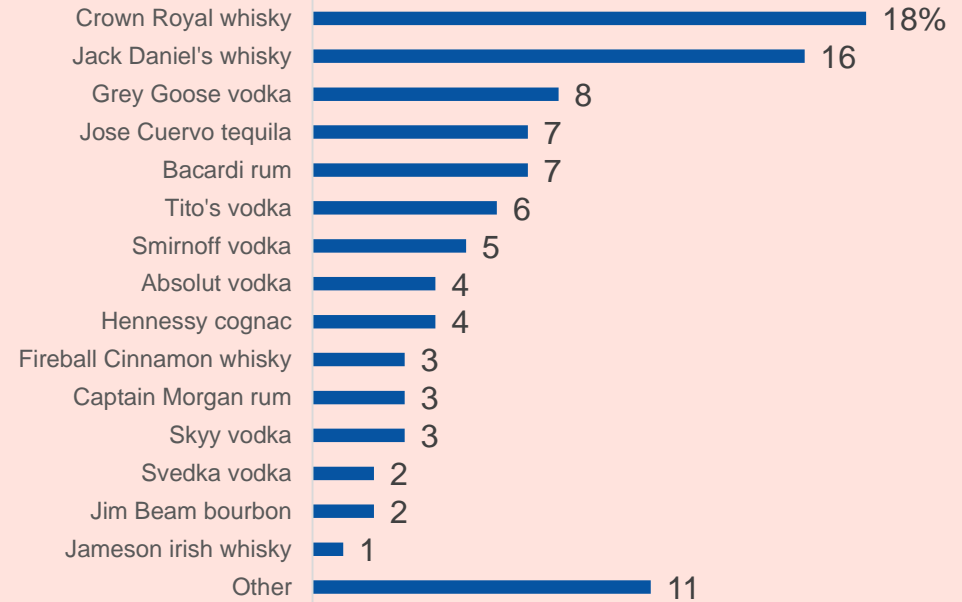


Beverage brand preferences

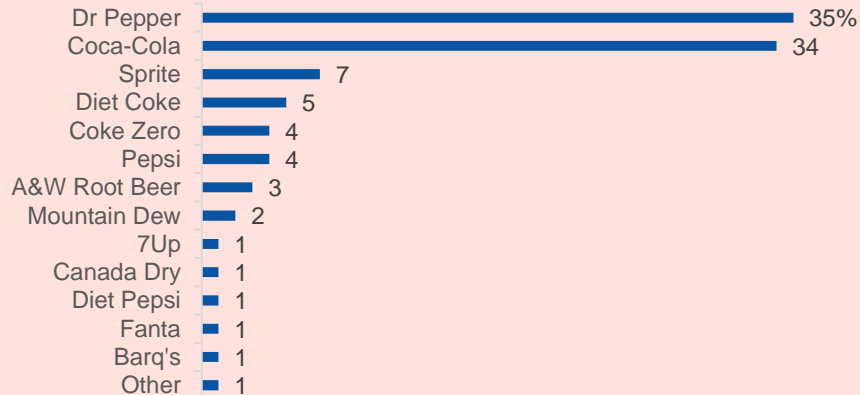
Beer brand drink most often (among beer drinkers)



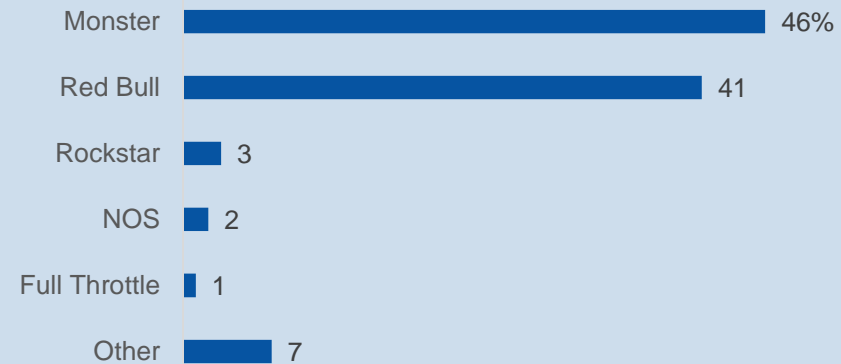
Preferred liquor or spirits brand (among liquor drinkers)



Soda or soft drink brand drink most often (among soda drinkers)

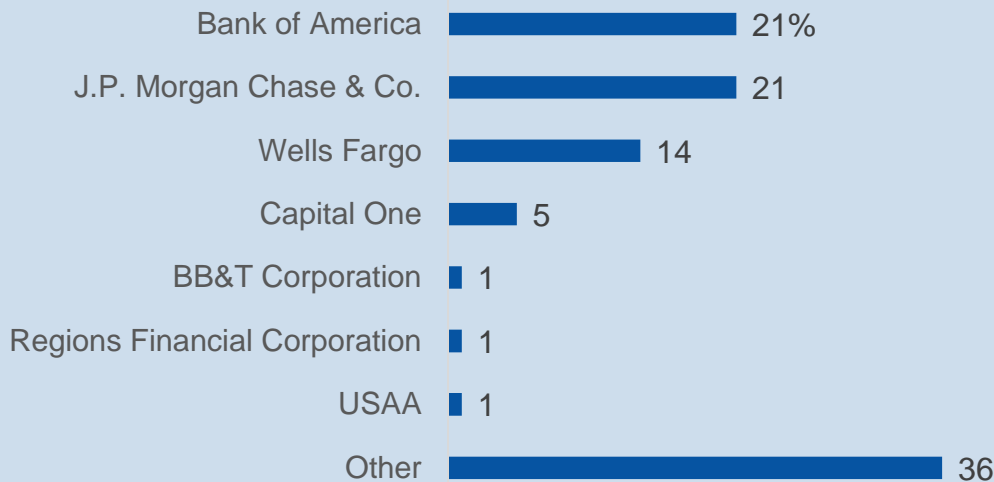


Preferred energy drink brand (among energy drink consumers)

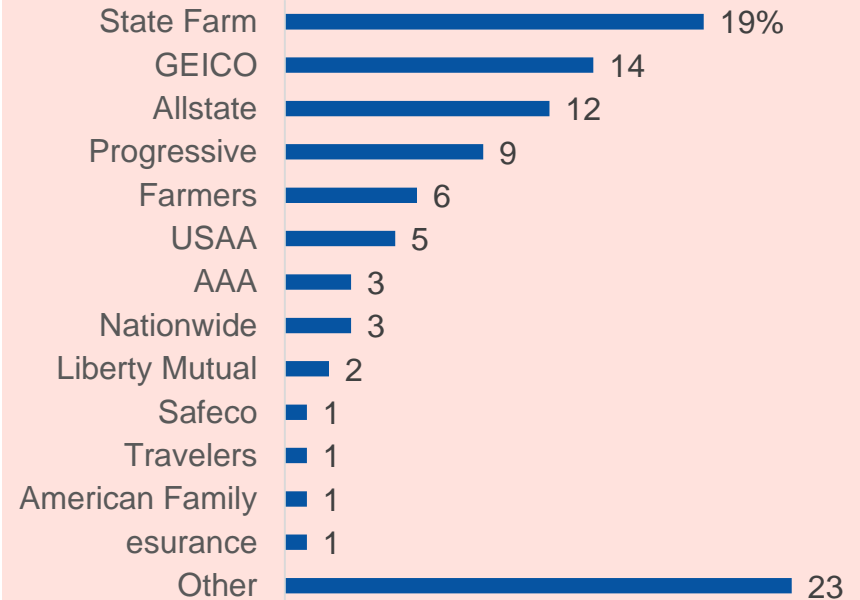


Bank, Insurance, and Airline brand preferences

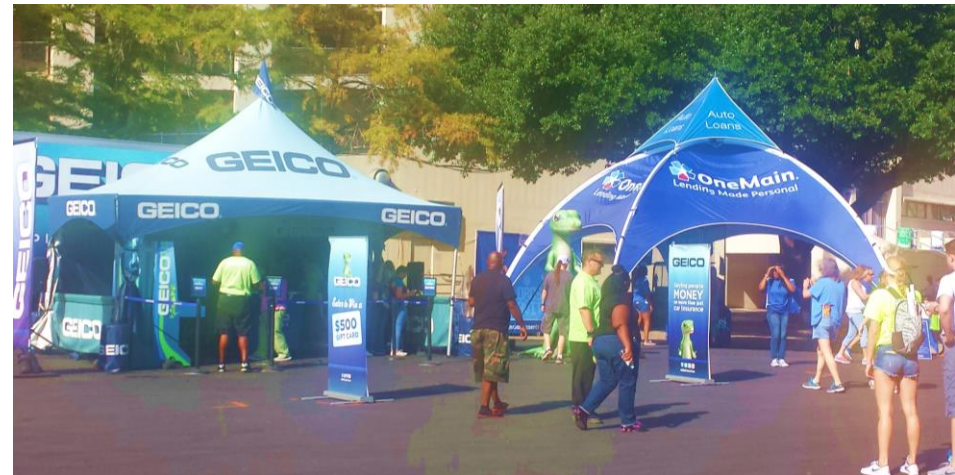
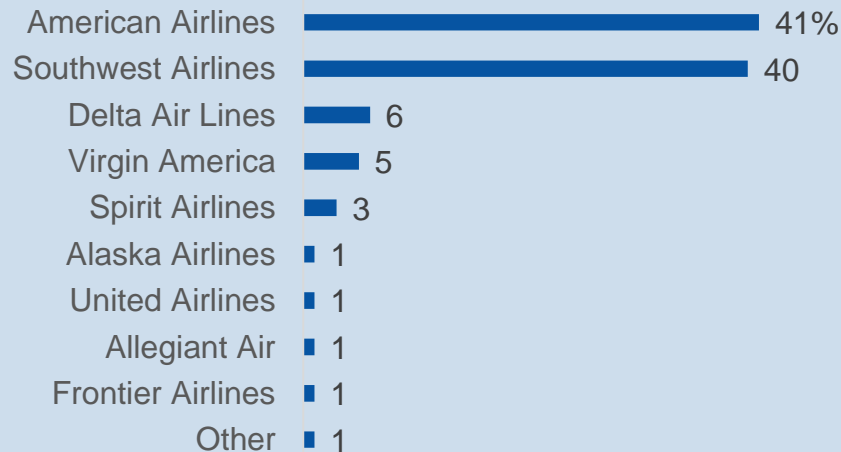
Bank use most often



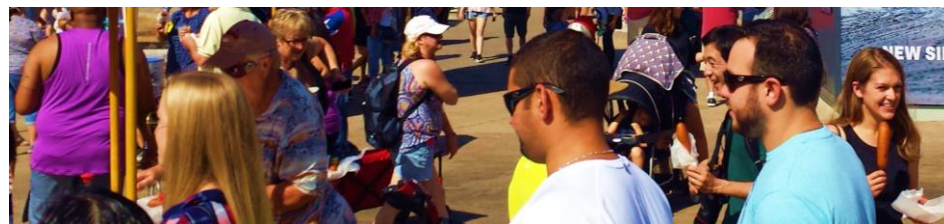
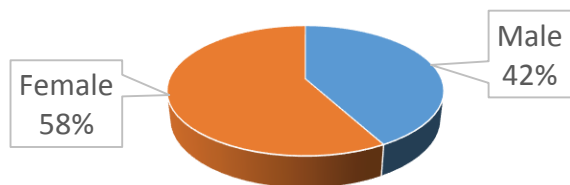
Auto insurance company



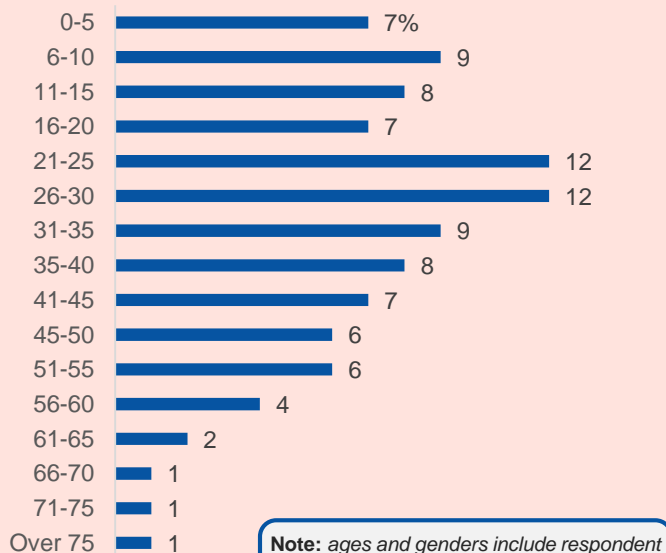
Preferred US airline (among those flying within 30 days)



Demographics of attendees

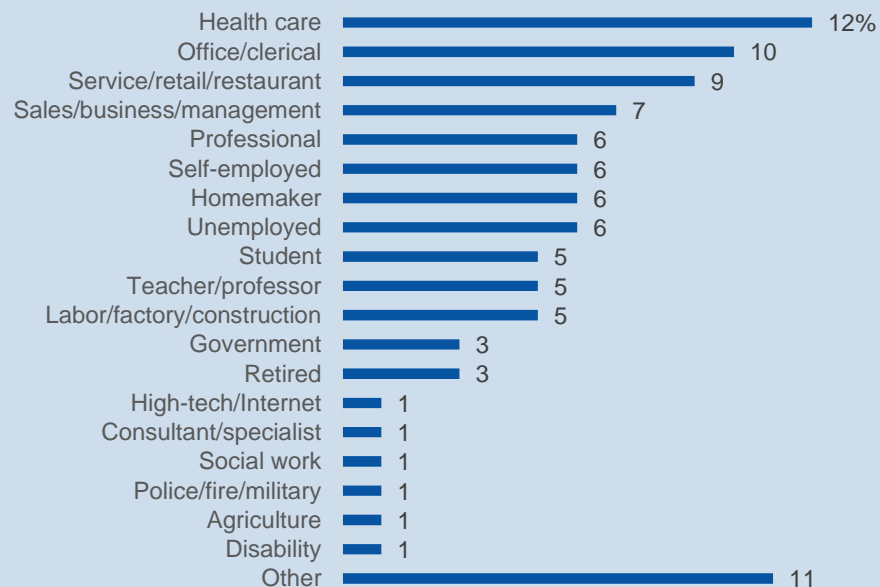


Age categories

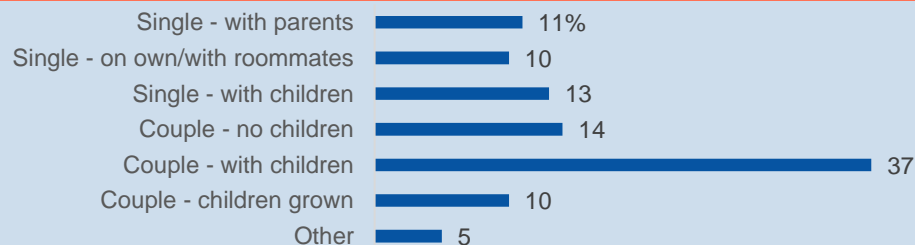


Note: ages and genders include respondent plus all members of their group

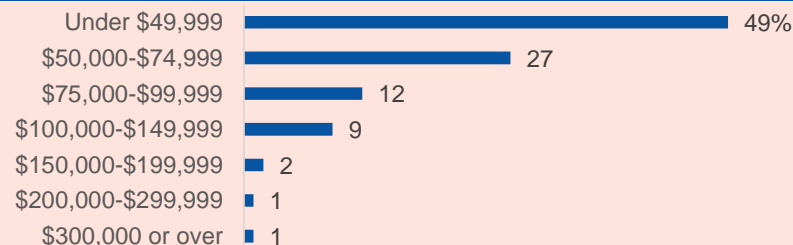
Occupation



Current living situation



Household income (before taxes)



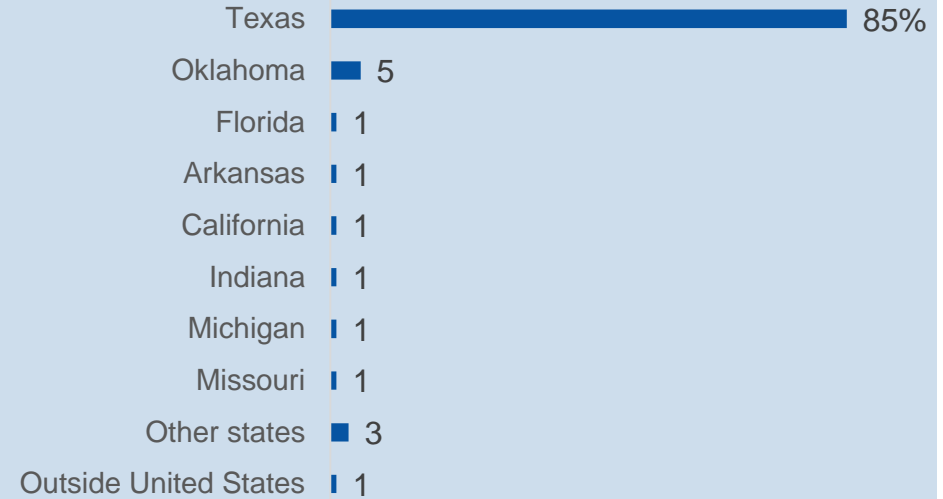
Tourism and economic impact

Estimated attendance

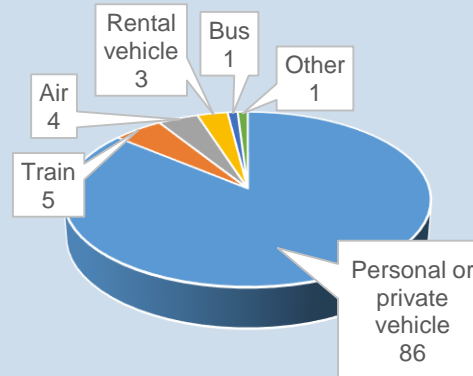
Total person-visits (from published attendance)	2,400,000
Average visits per person	2.1 visits
Estimated unique attendees	1,140,000
Total locals (Dallas-Fort Worth-Arlington)	855,000 (75%)
Total non-locals (outside Dallas-Fort Worth-Arlington)	285,000 (25%)
Estimated unique attendees	1,140,000

Average nights stayed (all non-locals)	1.4 nights
Estimated hotel/motel room nights	65,200

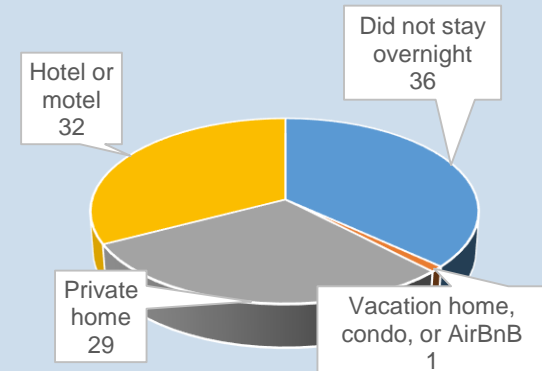
Place of residence (among non-locals)



Transportation to Dallas-Fort Worth-Arlington (among non-locals)



Accommodations in Dallas-Fort Worth-Arlington (among non-locals)



Economic impact



Total spending by non-locals	\$52.6M
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Economic impact (Industry output)	\$93.9M
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Direct and indirect	\$75.7M
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Induced	\$18.2M
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Total employment supported (full-year job equivalents)	1130
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Total taxes supported	\$12.3M
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Federal	\$6.3M
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State	\$3.5M
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Local	\$2.5M
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Spending by non-locals	
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Shopping and retail	\$9,000,000
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Restaurants outside fair site	\$8,800,000
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Accommodations	\$8,000,000
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Admission tickets and rides	\$7,900,000
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Concessions at fair	\$5,000,000
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Parking, fuel, and repairs	\$4,200,000
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Groceries	\$3,400,000
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Retail clothing	\$2,300,000
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Other entertainment	\$2,000,000
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Public transit or taxis	\$800,000
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Ride share services	\$700,000
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Car rentals	\$500,000
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Total spending by non-locals	\$52,600,000
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Spending by locals (not economic impact)	
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Restaurants outside fair site	\$38,000,000
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Admission tickets and rides	\$34,600,000
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Shopping and retail	\$24,400,000
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Parking and fuel	\$9,200,000
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Retail clothing	\$3,700,000
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Concessions at fair	\$3,300,000
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Public transit or taxis	\$2,000,000
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Ride share services	\$800,000
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Total spending by locals	\$116,000,000
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Comments from respondents

"Been attending every year since I was a child. Our group even wears matching shirts!"

"Customer service of employees was horrible!!"

"Everything was very expensive. That's why I only go once a year."

"Have never missed a year at the State Fair and this year was so special since we got to take our little one for his first time!"

"I absolutely love the history behind Fair Park and adore the traditions that my family has with the park."

"I proposed in front of Big Tex!"

"I really love the new wine and beer gardens and sitting areas."

"I really wish there was an interactive map or an app telling me where food items were located and times of events."

"Como siempre un gran experiencia , siete años asistiendo y siempre quedo satisfecho"

"My parents have been married 60 years. This was their 60th visit to the fair and 18 members of my family attended with us!"

"So very dated. Used to really show innovation and new technology. Now it is the same every year."

"My husband and I have been buying the season pass package with coupons for years. We drive from California to Dallas just for the Fair and go every day with different people."

"I'm from the Netherlands so this was my first experience. I love it!"

"Love that Honda was back."

"Love the fair and the auto show is the big draw for us."

"Love the State Fair and we will come back next year. Y'all do a wonderful job!"

"Museum quality viewing items or shows would be wonderful!"

"Need to bring some more Hispanic food!!!"

"Thanks for finally bringing back the Budweiser Clydesdales. That was one of the main reasons I went this year."

"Thank you all for the wonderful experience and for having a Thrifty Thursday."



Methodology

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 final Sunday evening of event
Sampling method	Proprietary algorithm featuring targeted pay-per-click ads and other databases
Sample size	Over 1500 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 Event Intelligence Reports

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

