ENIGMA INDEPENDENT EVENT AUDITS
Unbiased Intelligence for Senior Marketers

enigma research

2016 Los Angeles Auto Show
Los Angeles, California

November 18-27, 2016

Highlights

Most popular reasons for attending

1. For entertainment
2. To compare models
3. To see concept vehicles

Most recalled sponsors

1. State Farm
2. Galpin Motors
3. Pirelli

Most visited manufacturer exhibits

1. Dodge
2. Ford
3. Toyota

Top beverages consumed on-site

1. Bottled or boxed water
2. Soda or soft drinks
3. Coffee or coffee drinks

Most appreciated manufacturer exhibits

1. Acura
2. Porsche
3. Mercedes-Benz

Top preferred brands of attendees

- Auto insurance: AAA
- Beer: Heineken
- Liquor: Grey Goose Vodka and Jameson Irish whisky

Most popular features within manufacturer exhibits

1. Nissan Star Wars Rogue One displays
2. Acura NSX VR driving game
3. Kia Hamsters

Tourism and economic impact

- Percentage non-local: 29%
- Estimated hotel room nights: 58,500
- Estimated economic impact of attendees: $50.7M

Most popular feature attractions

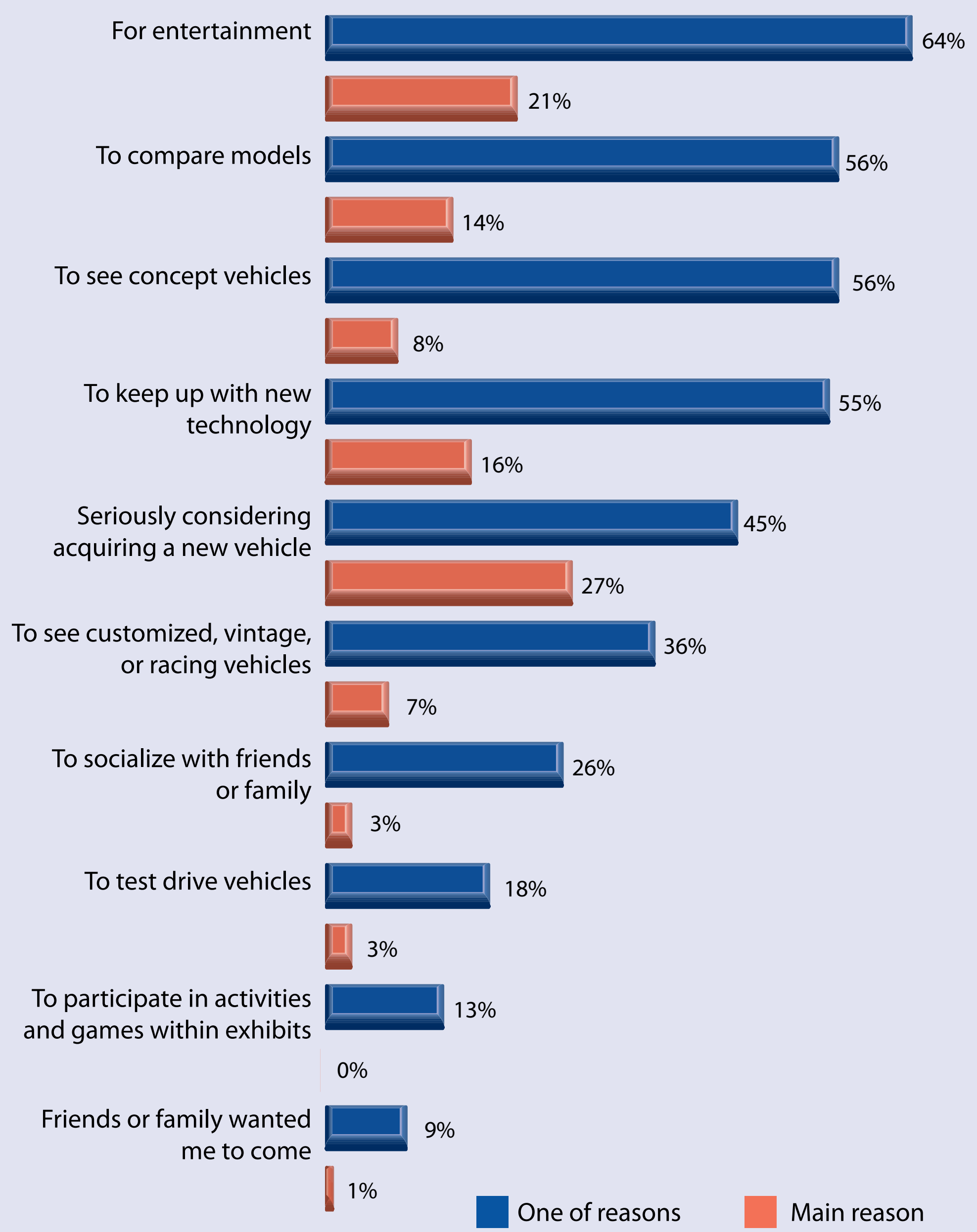
1. Galpin Hall of Customs
2. The Garage
3. Porsche Lego show car

Best attendee comments

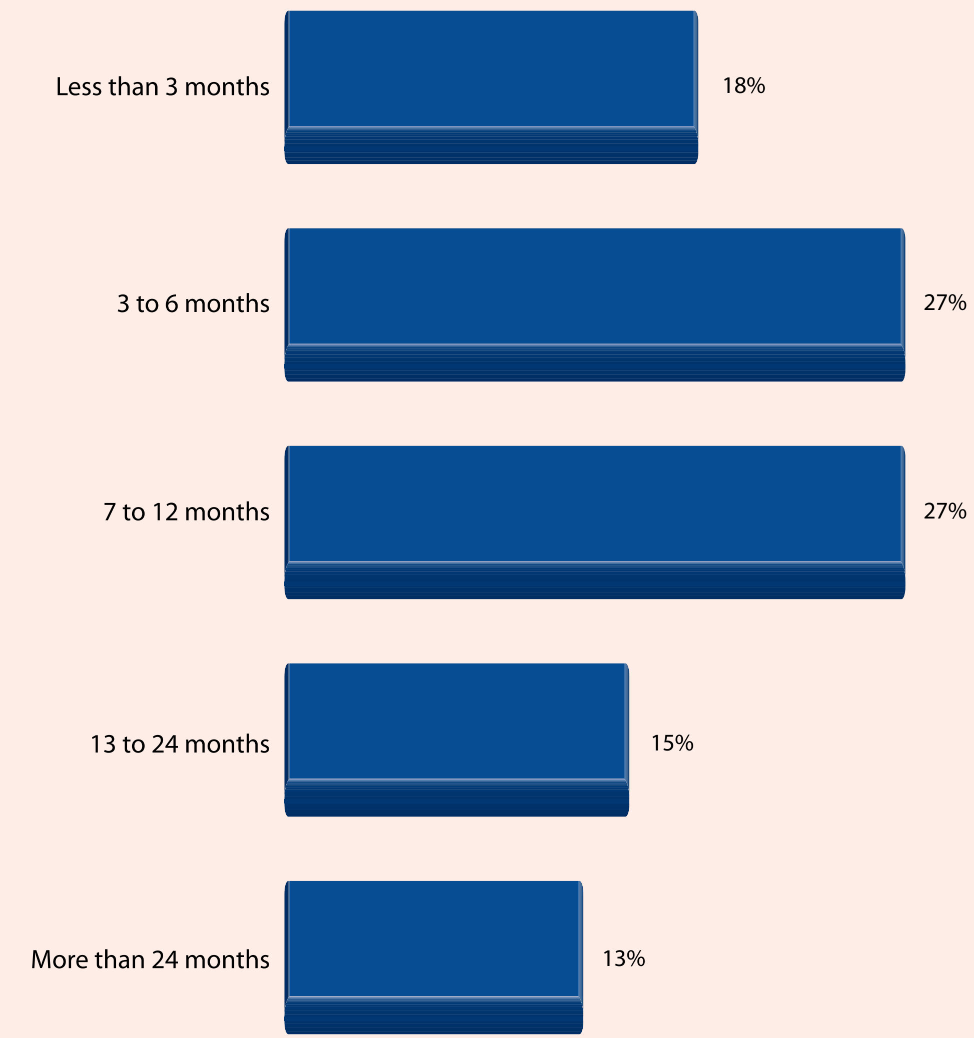
- “The new cutting edge stuff should be premiered in LA. We are the automobile capital of the world.”
- “Please bring back more free swag/promotional items; I miss those days!”
- “I would like to see more electric and customized cars.”

Event Experience

Reasons for attending the show (aided)

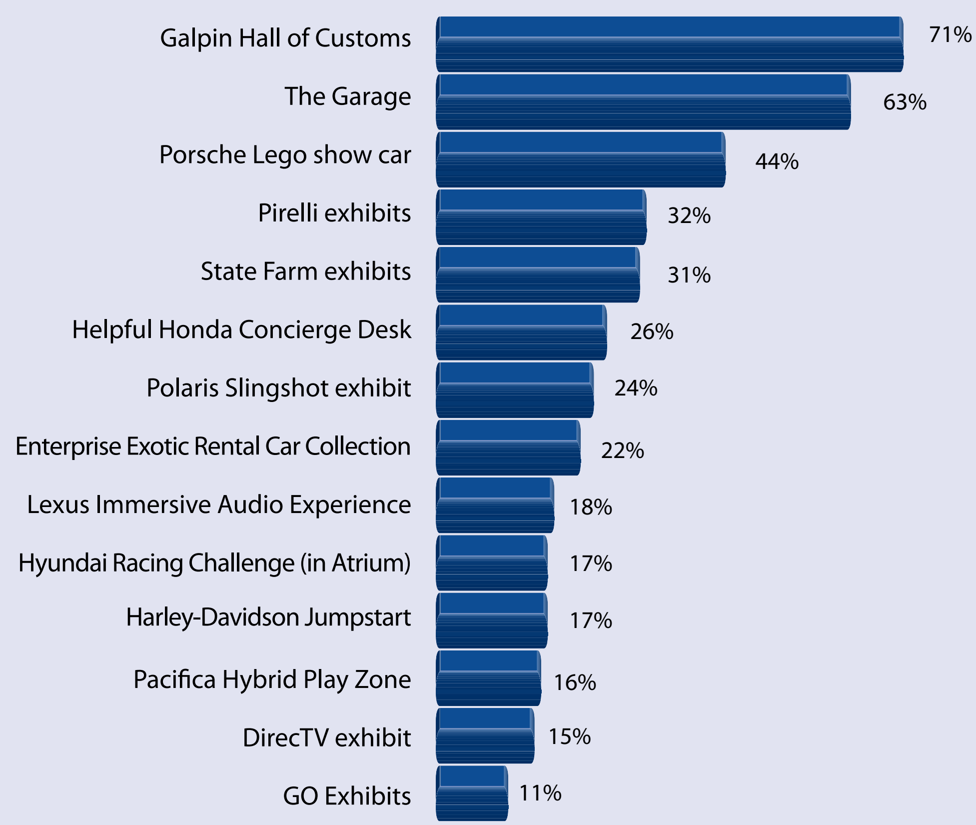


Time frame for next vehicle acquisition (among those seriously considering)

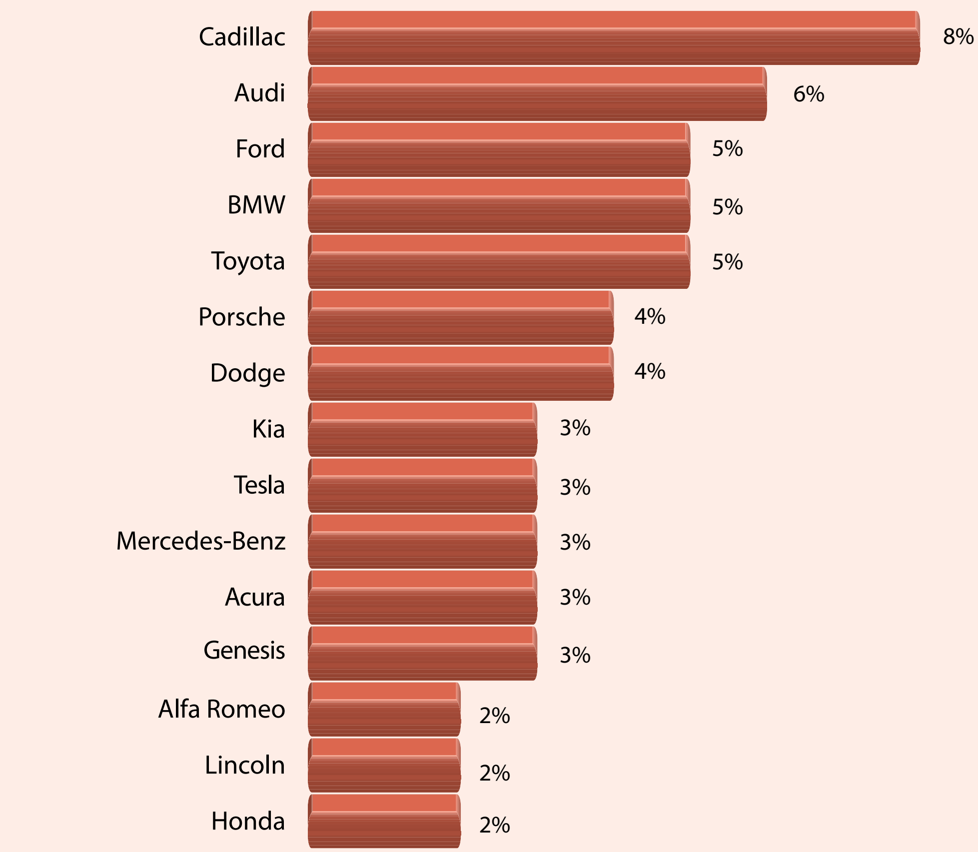


Event Experience

Feature attractions visited at show

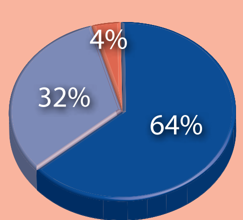


Brand of favorite vehicle at show (unaided)

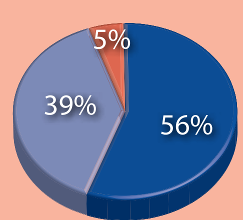


Event ratings

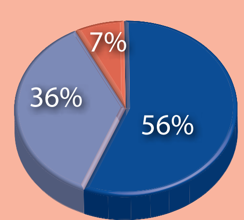
excellent good fair poor



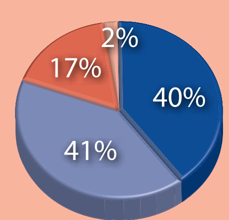
Quality of exhibits



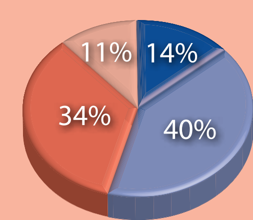
Cleanliness



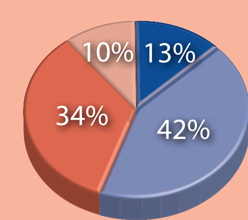
Variety of exhibits



Value for admission price

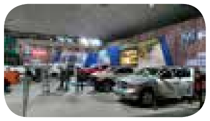


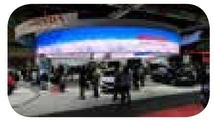
Variety of food and beverage



Quality of food and beverage

Manufacturer Exhibit Evaluations





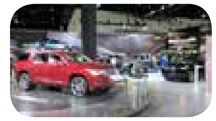
	Dodge	Ford	Toyota	Honda	Mercedes-Benz	Jaguar-Land Rover	Audi	Chevrolet
PARTICIPATION RANKING	1	2	3	4	5	6	7	7
ENHANCEMENT RANKING	15	20	16	6	3	18	11	9
PARTICIPATION								
Entered exhibit	80%	79%	73%	72%	70%	65%	65%	65%
Saw from outside	17%	19%	15%	26%	27%	31%	30%	30%
Did not see	3%	2%	12%	2%	3%	4%	5%	5%
ACTIONS TAKEN (among those who entered)								
Sat in vehicle	85%	84%	72%	70%	76%	73%	83%	79%
Listened to presenter	46%	19%	42%	40%	53%	51%	37%	49%
Spoke with specialist	22%	11%	14%	23%	18%	27%	14%	39%

SPECIAL FEATURES EXPERIENCED (among those who entered)

Dodge	Ford	Toyota	Honda	Mercedes-Benz	Jaguar-Land Rover	Audi	Chevrolet
Played or watched Viper Challenge game 20%	Build your own Ford button 18%	Watched show on Toyota Live stage 23%	Played Dream Machine cannon firing game 28%		Played Jaguar VR racing game 11%		Tried Chevy-View 360-degree camera 18%
Entered contest to win $45,000 towards vehicle 13%	Forza Race Simulators 11%	Took Action Photo with BMX or skateboard 9%	Obtained Honda Smart Band bracelet 25%		Played Land Rover VR sailing game 5%		Played or watched electronic Design Studio feature 13%
	F-150 Trailer Backup Assist demonstration 11%	Experienced Toyota Mirai tour in VR 5%	Received a prize or gift 20%		Played or watched driver assistance demo game 5%		Used sports card themed photo kiosk 10%
	Fantastic Face wind-in-face exhibit 11%		Used kiosk to change window colors on HR-V 18%				
	Raptor Dueling Simulators 9%						
	Color Me Mobility coloring table 2%						

	Dodge	Ford	Toyota	Honda	Mercedes-Benz	Jaguar-Land Rover	Audi	Chevrolet
EXTENT ENHANCED SHOW EXPERIENCE (among those who entered)								
Greatly enhanced	43%	40%	42%	55%	61%	41%	50%	51%
Somewhat enhanced	50%	47%	42%	31%	24%	49%	47%	46%
Did not enhance	7%	13%	16%	14%	16%	10%	3%	3%
MORE LIKELY TO PURCHASE BRAND THAN BEFORE THE SHOW (among those who entered)								
Japanese owners	65%	67%	83%	65%	40%	61%	91%	92%
European owners	100%	50%	56%	75%	67%	44%	70%	57%
Korean owners	25%	40%	100%	33%	0%	...	0%	100%
General Motors owners	50%	86%	67%	100%	100%	0%	...	100%
Ford-Lincoln owners	33%	100%	33%	50%	40%	80%	67%	67%
FCA owners	20%	60%	0%	0%	50%	0%	33%	67%

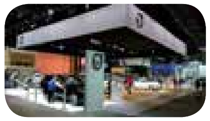
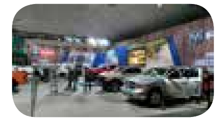
Manufacturer Exhibit Evaluations

	Cadillac	Subaru	Kia	Porsche	BMW-Mini	GMC	Mazda	Lexus
								
PARTICIPATION RANKING	9	10	11	12	13	14	14	16
ENHANCEMENT RANKING	14	23	30	2	16	18	25	5
PARTICIPATION								
Entered exhibit	65%	64%	64%	60%	60%	59%	59%	57%
Saw from outside	28%	25%	24%	31%	30%	29%	29%	36%
Did not see	7%	11%	12%	9%	10%	12%	12%	7%
ACTIONS TAKEN (among those who entered)								
Sat in vehicle	88%	89%	80%	37%	85%	81%	87%	80%
Listened to presenter	50%	29%	34%	57%	28%	50%	35%	49%
Spoke with specialist	29%	17%	17%	27%	23%	22%	26%	34%
SPECIAL FEATURES EXPERIENCED (among those who entered)								
			Saw or took photos with Kia hamster 34%	Played or watched racing VR game 33%				
			Experienced circular floor projection 11%					
			Used Kia hamster photo booth 9%					
EXTENT ENHANCED SHOW EXPERIENCE (among those who entered)								
Greatly enhanced	47%	37%	27%	63%	42%	41%	34%	58%
Somewhat enhanced	41%	43%	54%	31%	48%	34%	50%	40%
Did not enhance	12%	20%	19%	6%	10%	25%	16%	2%
MORE LIKELY TO PURCHASE BRAND THAN BEFORE THE SHOW (among those who entered)								
Japanese owners	42%	44%	50%	45%	59%	44%	53%	68%
European owners	50%	38%	45%	78%	58%	33%	33%	63%
Korean owners	75%	100%	100%	50%	0%	...	0%	50%
General Motors owners	83%	0%	100%	0%	50%	67%	80%	75%
Ford-Lincoln owners	67%	33%	50%	33%	100%	50%	100%	67%
FCA owners	0%	0%	0%	0%	33%	0%	0%	100%

Manufacturer Exhibit Evaluations

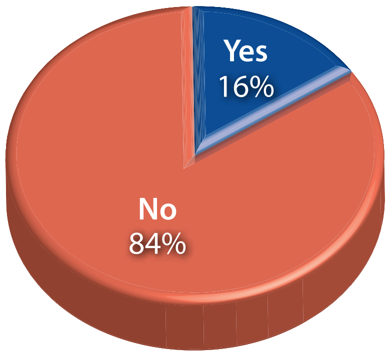
	Nissan	Volkswagen	Lincoln	Jeep	Tesla	Hyundai	Fiat	Acura
								
PARTICIPATION RANKING	17	18	19	20	21	22	23	24
ENHANCEMENT RANKING	6	22	13	11	9	30	28	1
PARTICIPATION								
Entered exhibit	56%	56%	55%	55%	54%	49%	48%	46%
Saw from outside	36%	29%	37%	29%	32%	38%	43%	43%
Did not see	8%	15%	8%	16%	13%	13%	9%	11%
ACTIONS TAKEN (among those who entered)								
Sat in vehicle	60%	97%	56%	83%	67%	69%	71%	74%
Listened to presenter	24%	39%	63%	45%	53%	36%	46%	35%
Spoke with specialist	16%	23%	19%	17%	23%	13%	17%	13%
SPECIAL FEATURES EXPERIENCED (among those who entered)								
	looked at or took photos of Star Wars displays 73%	Played or watched VR automated driving experience 23%		Entered contest to win $45,000 towards vehicle 14%		Entered NFL gift and tailgate party contest 23%	Played or watched Free Like a Bird flight game 8%	Played or watched NSX VR driving game 43%
	Used virtual reality Nissan Innovation Experience app 27%	Experienced App-Connect smartphone display 19%				Watched #BecauseFootball screen show 13%	Entered contest to win $45,000 towards vehicle 8%	
	Played or watched GT-R driving game 16%					Participated in #HyundaiSwag social media contest 10%	Used photo kiosk 0%	
						Learned about Hyundai Hope on Wheels Program 3%		
EXTENT ENHANCED SHOW EXPERIENCE (among those who entered)								
Greatly enhanced	55%	39%	49%	50%	51%	27%	31%	65%
Somewhat enhanced	34%	52%	45%	37%	37%	63%	58%	27%
Did not enhance	10%	10%	6%	13%	12%	10%	11%	8%
MORE LIKELY TO PURCHASE BRAND THAN BEFORE THE SHOW (among those who entered)								
Japanese owners	53%	45%	50%	40%	56%	48%	75%	91%
European owners	10%	70%	57%	50%	80%	60%	43%	50%
Korean owners	67%	0%	33%	67%	100%	100%	...	...
General Motors owners	14%	50%	100%	83%	75%	67%	...	...
Ford-Lincoln owners	25%	0%	100%	50%	75%	100%	60%	67%
FCA owners	100%	...	0%	50%	100%	50%	...	100%

Manufacturer Exhibit Evaluations

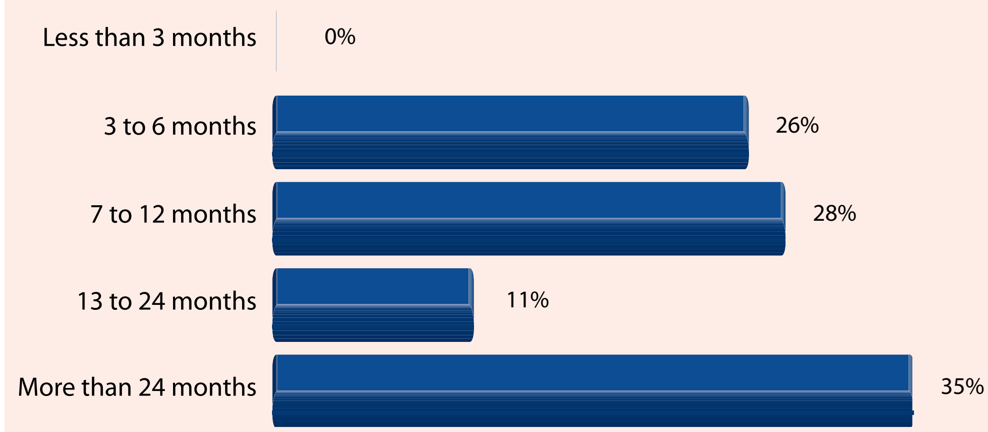
	Chrysler	Volvo	Infiniti	Alfa Romeo	Maserati	RAM	Buick	Mitsubishi
								
PARTICIPATION RANKING	25	25	27	28	29	30	31	32
ENHANCEMENT RANKING	32	4	27	20	6	24	25	29
PARTICIPATION								
Entered exhibit	46%	46%	44%	44%	43%	39%	37%	24%
Saw from outside	41%	41%	47%	42%	48%	41%	42%	42%
Did not see	13%	13%	9%	14%	9%	20%	21%	33%
ACTIONS TAKEN (among those who entered)								
Sat in vehicle	81%	92%	83%	52%	57%	77%	59%	75%
Listened to presenter	48%	44%	30%	62%	43%	23%	63%	19%
Spoke with specialist	22%	24%	17%	29%	24%	17%	18%	19%
SPECIAL FEATURES EXPERIENCED (among those who entered)								
	Entered draw to win $45,000 towards vehicle 11%	Took photos of Gustav the Moose 12%				Entered draw to win $45,000 towards vehicle 13%		
EXTENT ENHANCED SHOW EXPERIENCE (among those who entered)								
Greatly enhanced	23%	59%	32%	40%	55%	36%	34%	28%
Somewhat enhanced	54%	30%	59%	44%	32%	52%	49%	44%
Did not enhance	23%	11%	9%	16%	13%	13%	17%	28%
MORE LIKELY TO PURCHASE BRAND THAN BEFORE THE SHOW (among those who entered)								
Japanese owners	25%	45%	50%	75%	25%	60%	45%	22%
European owners	56%	100%	38%	50%	67%	83%	17%	14%
Korean owners	...	0%	0%	100%	0%	...	100%	100%
General Motors owners	100%	0%	100%	...	50%	50%	16%	...
Ford-Lincoln owners	25%	100%	50%	20%	0%	100%	100%	100%
FCA owners	0%	0%	...	...	0%	50%	100%	100%

Test Drives

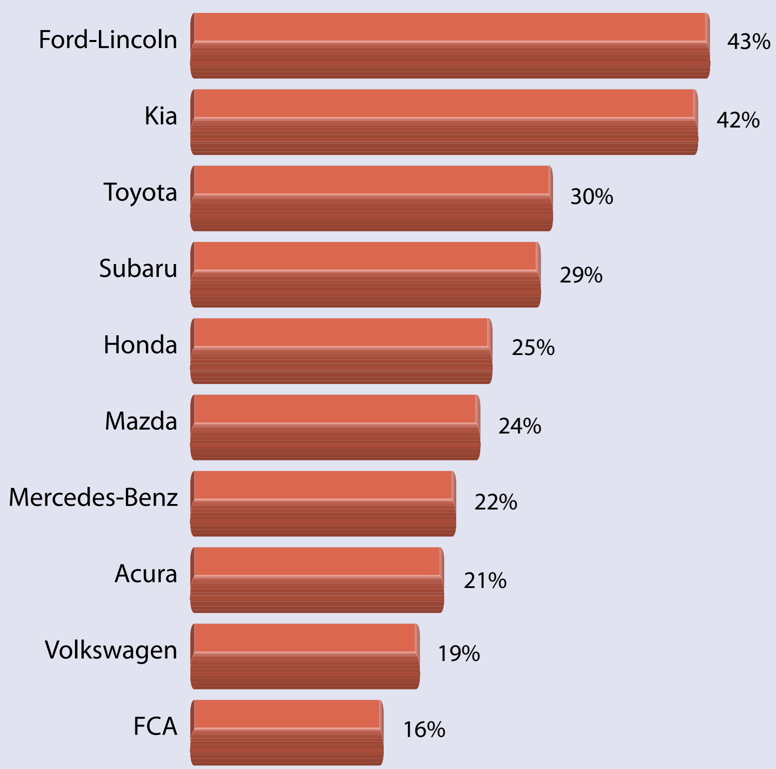
Test drove vehicles at show



Time frame for next vehicle acquisition (among test drive participants)

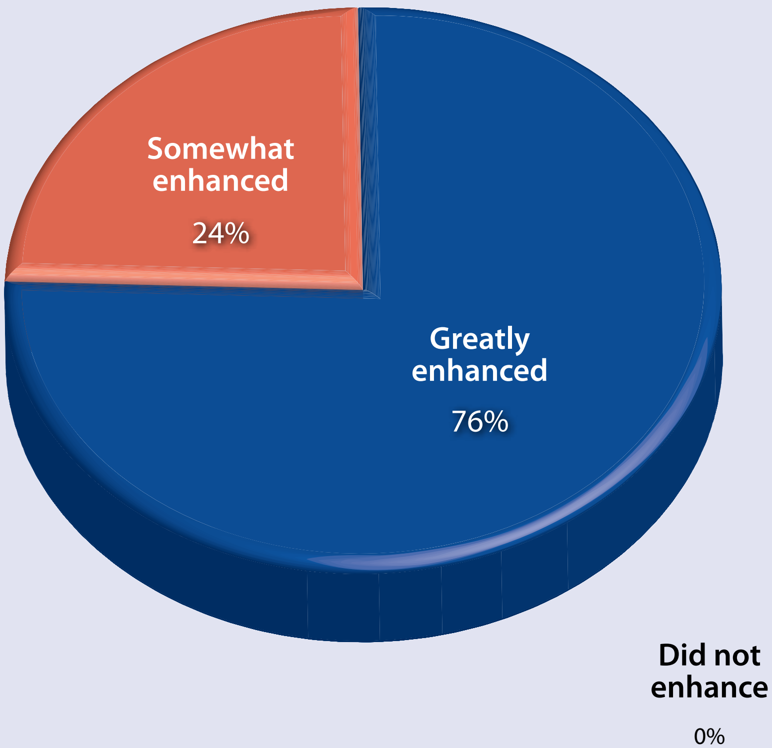


Brands tested at show (among test drive participants)



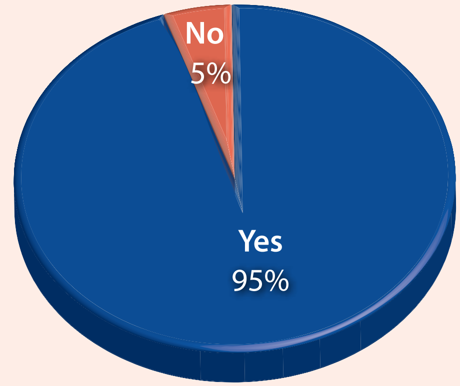
Test Drives

Extent enhanced show experience (among test drive participants)

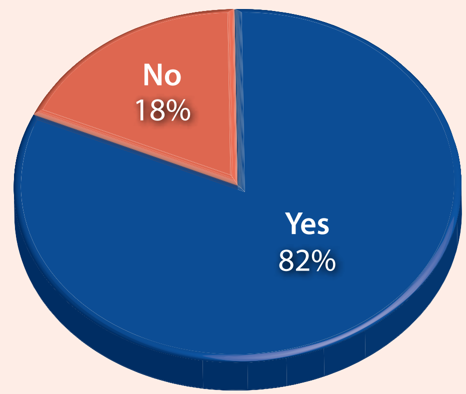


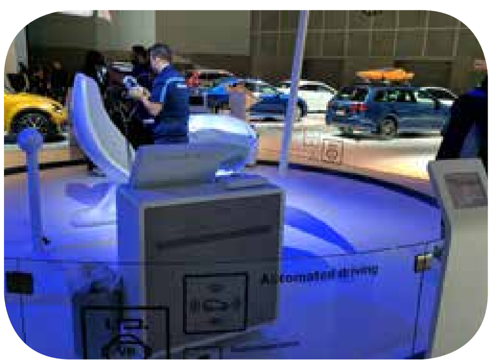
More likely to consider brands tested

Participants purchasing within next 12 months



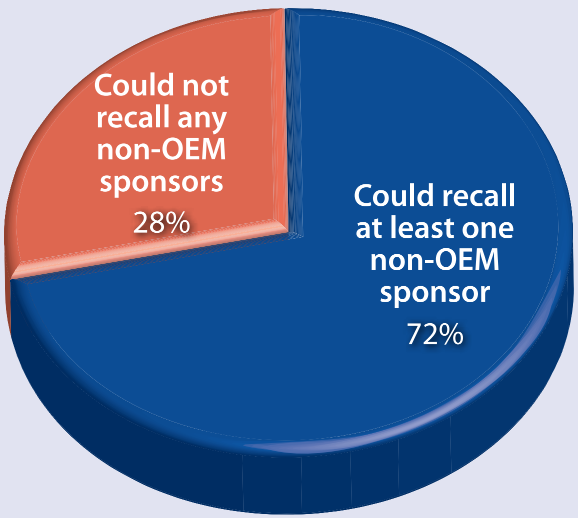
Other participants



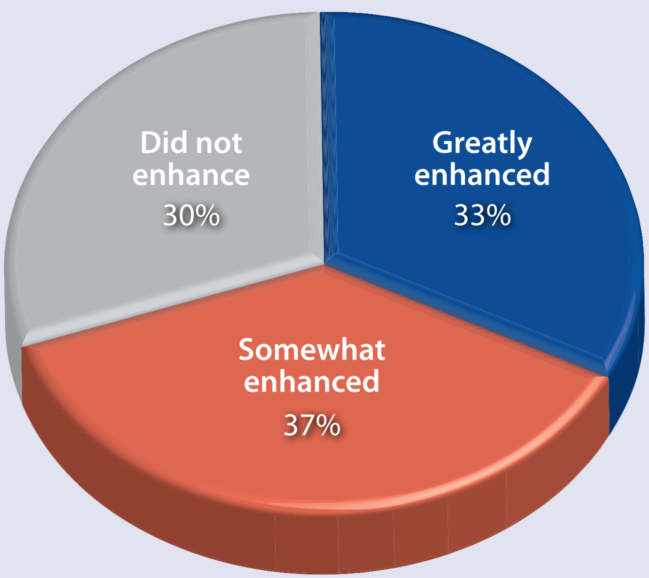


Other Sponsors and Activations

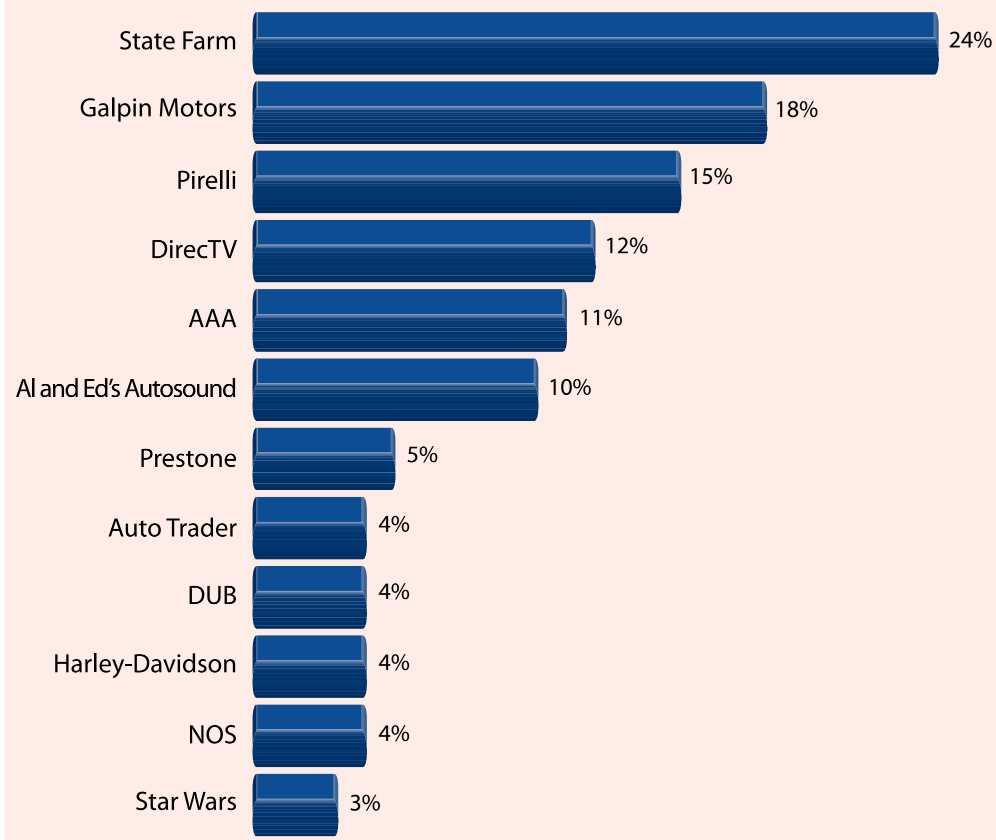
Non-OEM sponsor recall



Extent to which non-OEM sponsors and brands enhanced experience

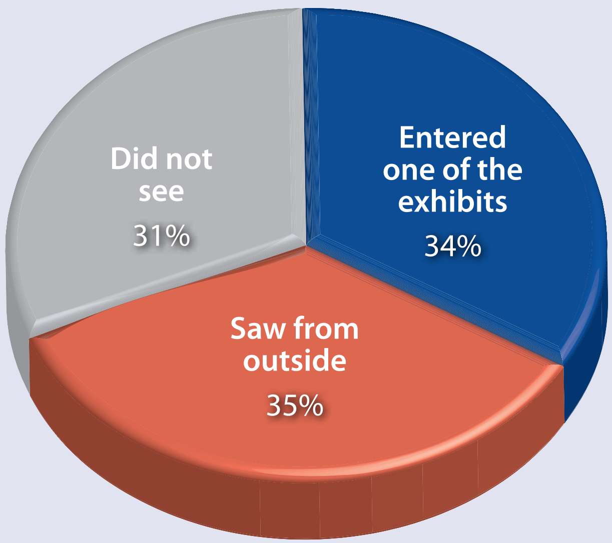


Non-OEM sponsors (Top 3 unaided among those who could recall sponsors)

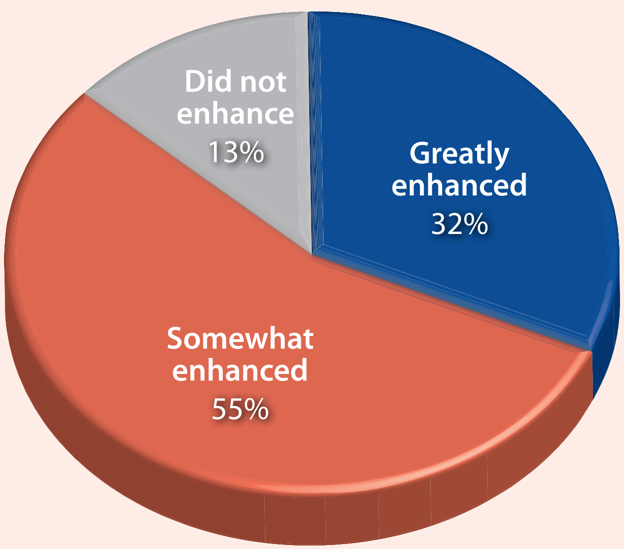


Other Sponsors and Activations

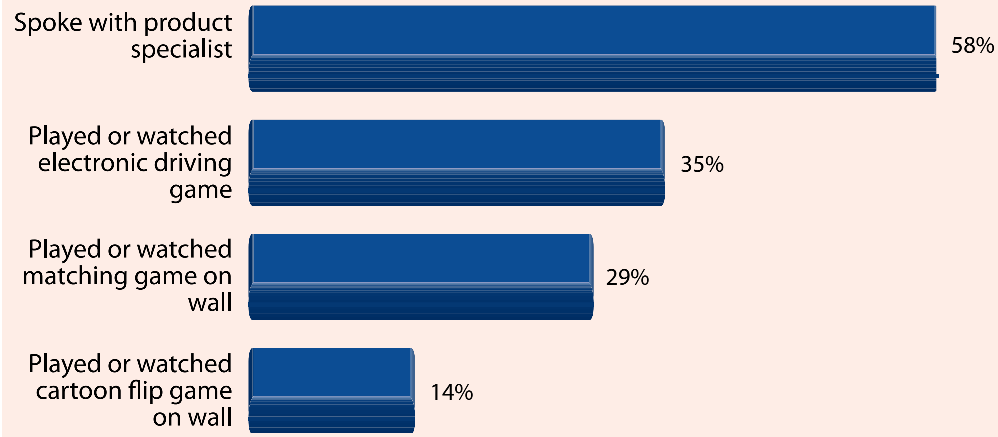
State Farm Exhibit participation



Extent enhanced show experience (among those who entered)

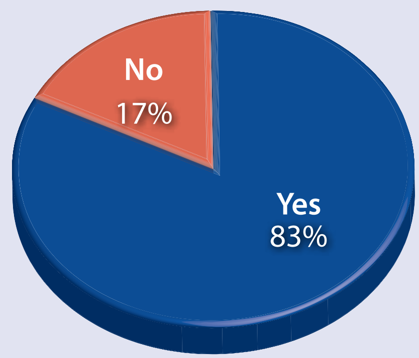


Activities experienced (among those who entered)

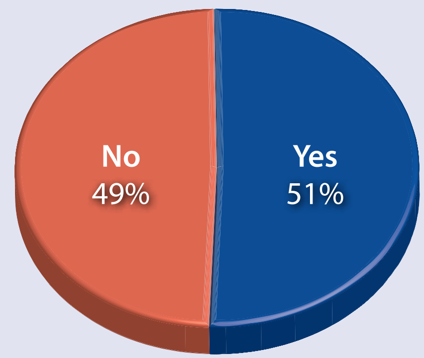


More likely to consider State Farm than before the show
(among those who entered)

State Farm customers



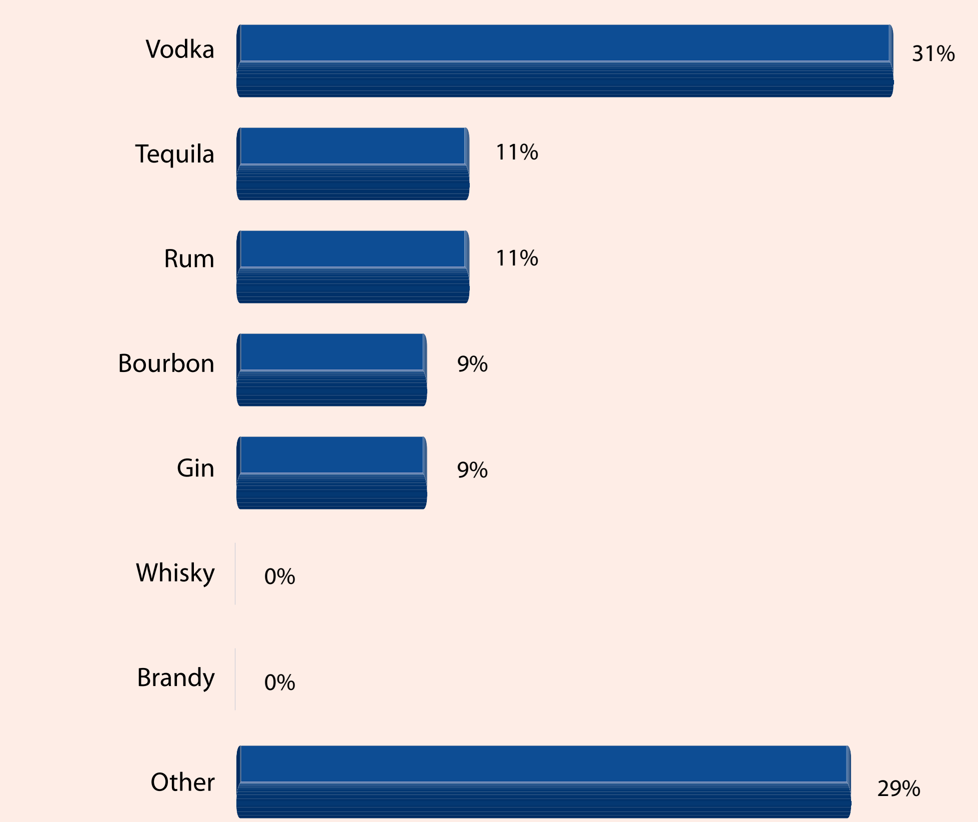
Other customers



Beverage Consumption

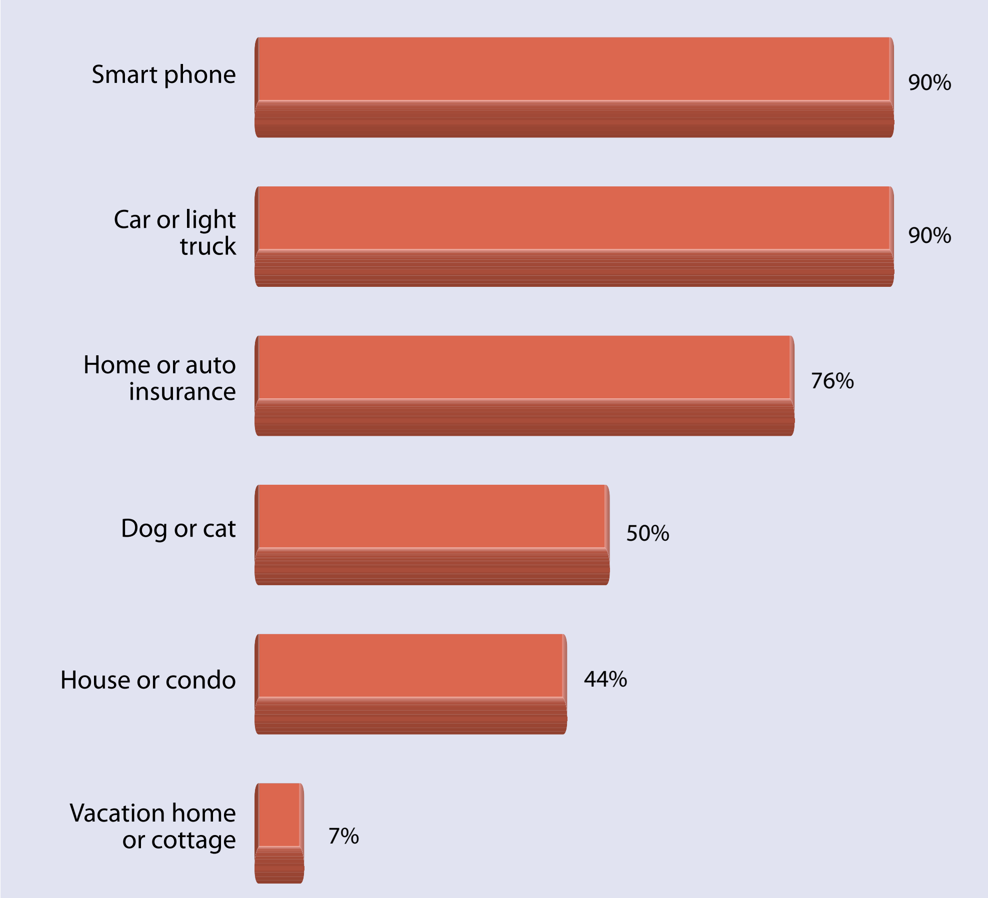
Beverages consumed on-site	Percentage consumed on-site	Average consumed at event (among consumers)
Bottled or boxed water	47%	1.6
Soda or soft drinks	37%	1.4
Coffee or coffee drinks	21%	1.2
Beer	12%	1.6
Energy drinks	10%	1.1
Juice	6%	1.2
Liquor or spirits	4%	1.7
Wine or wine drinks	1%	1.4
Other beverages	8%	1.4

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

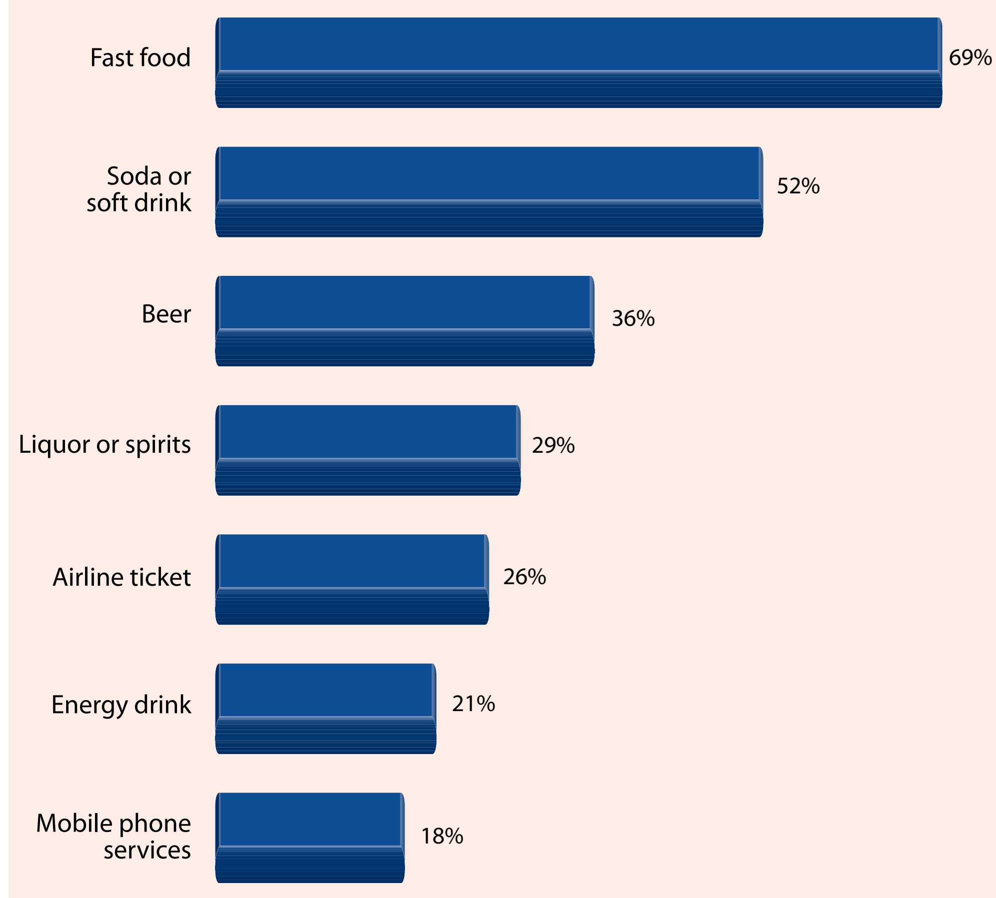


Product Ownership and Use

Product ownership

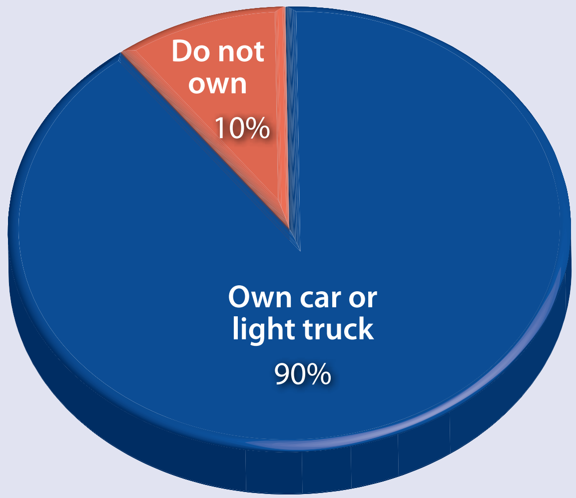


Products purchasing within next 30 days

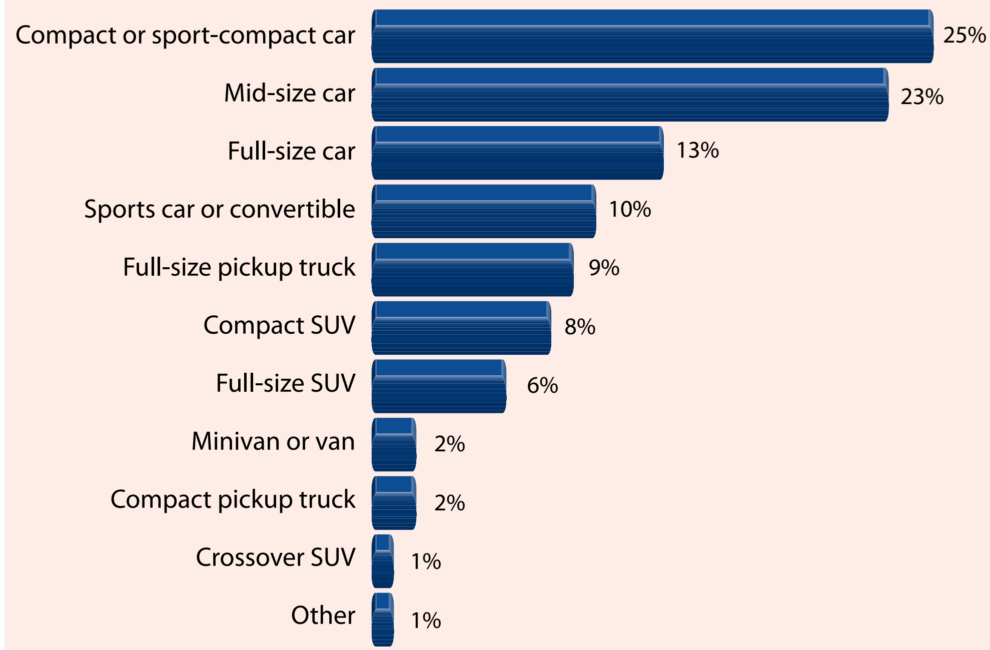


Vehicle Preferences

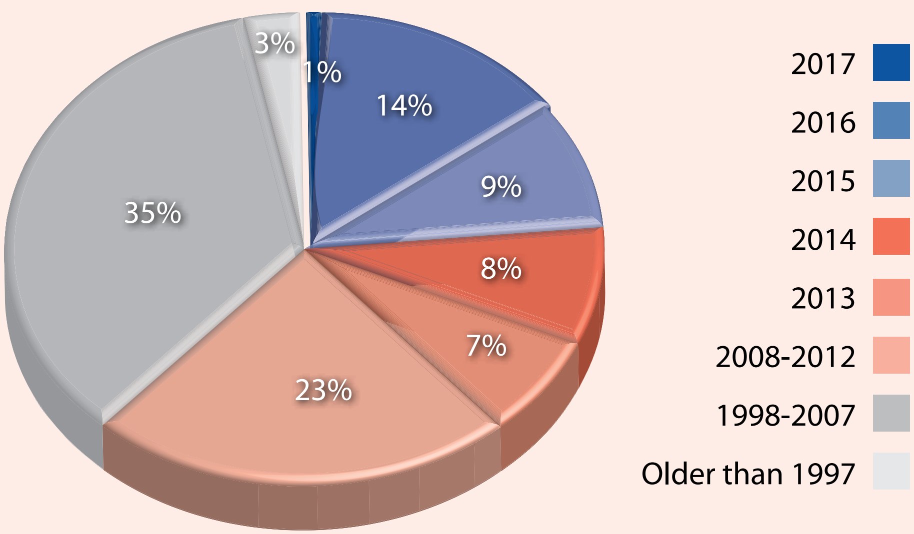
Vehicle ownership

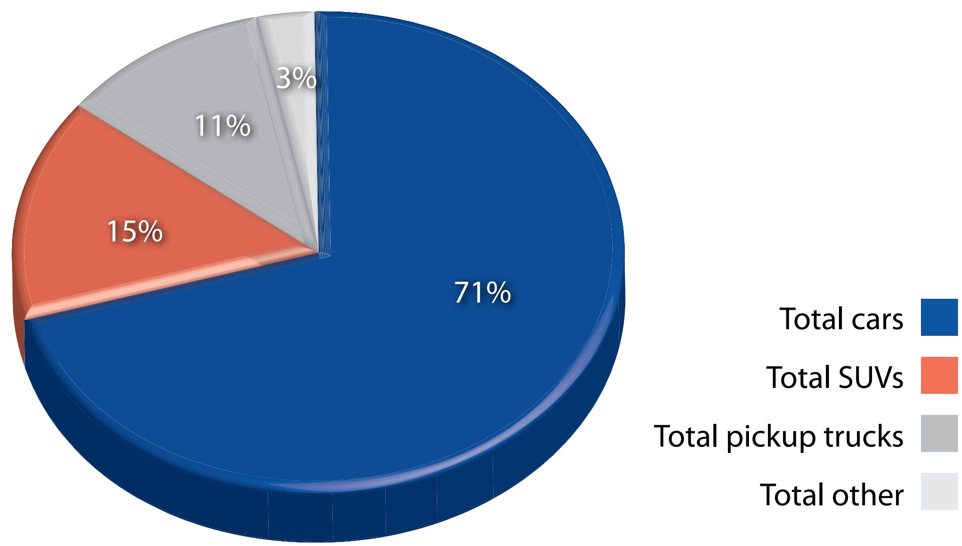


Type of vehicle driven (among owners)

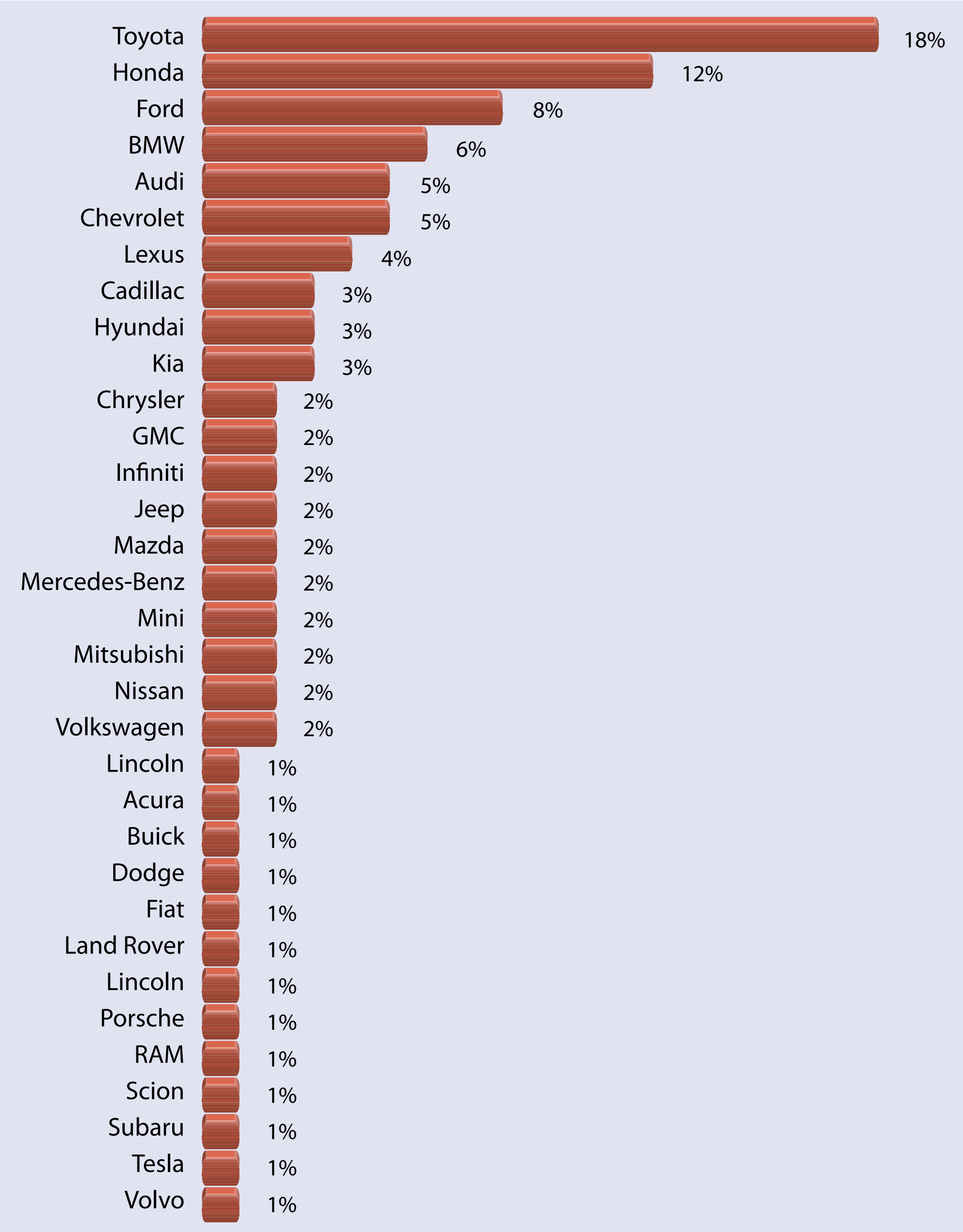


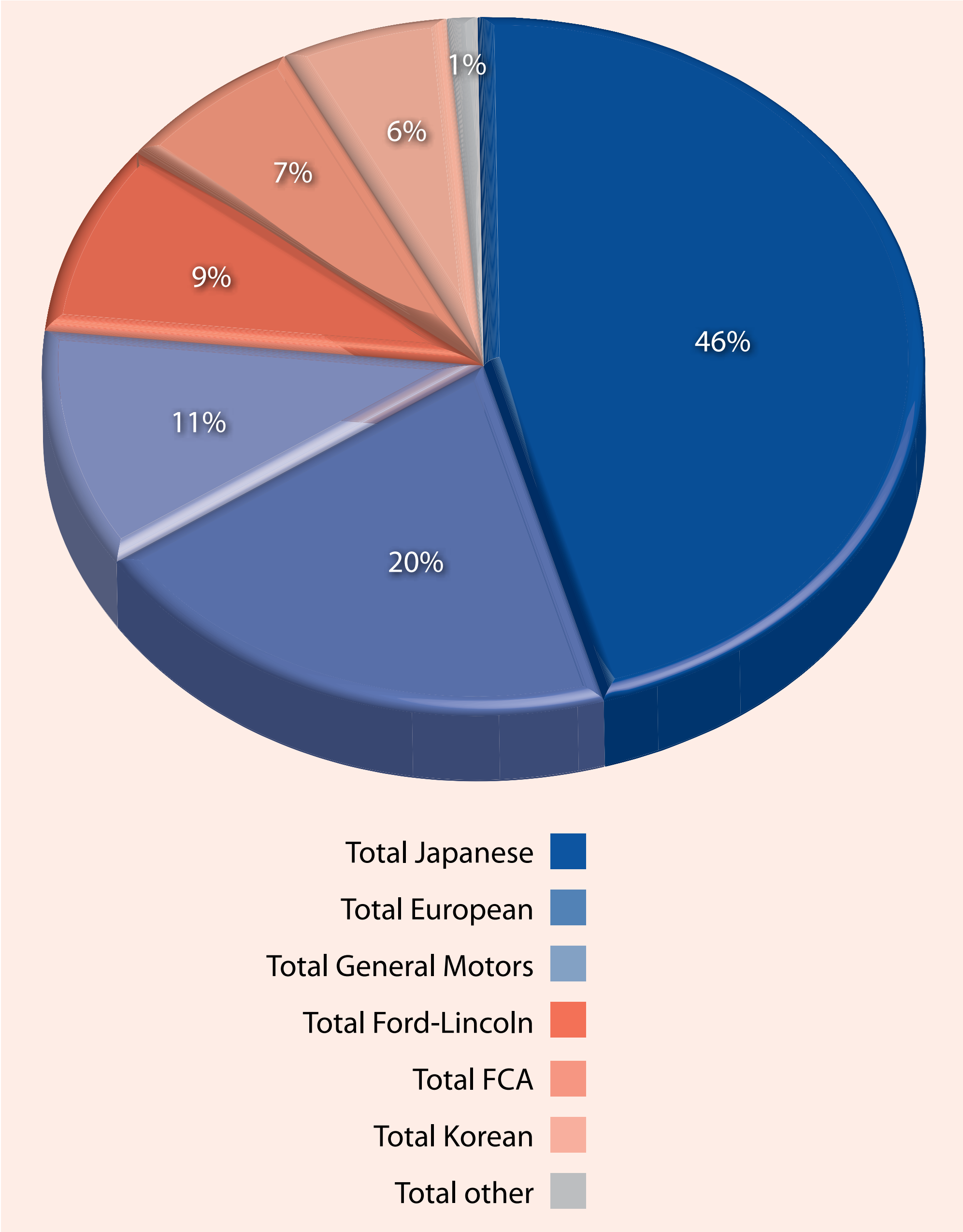
Model year of vehicle driven (among owners)





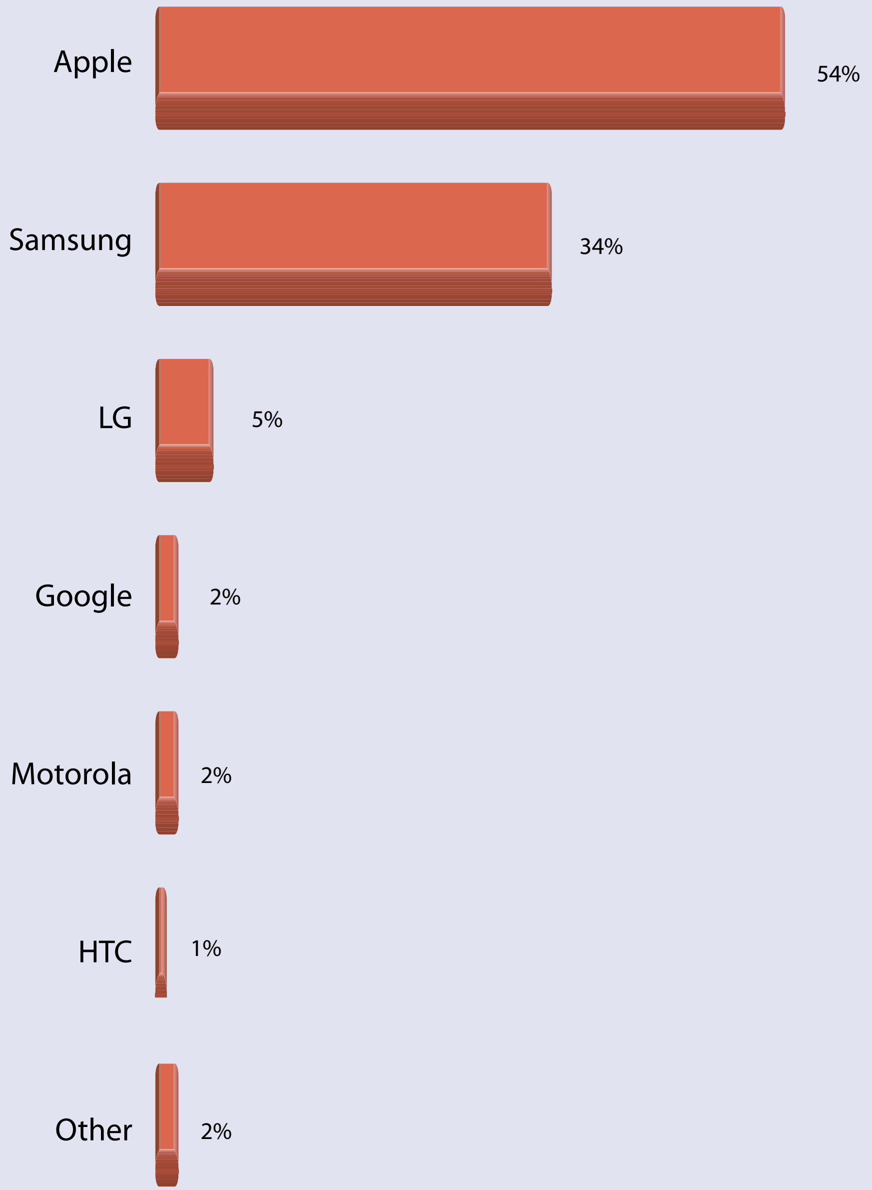
Brand of Vehicle Driven (among owners)



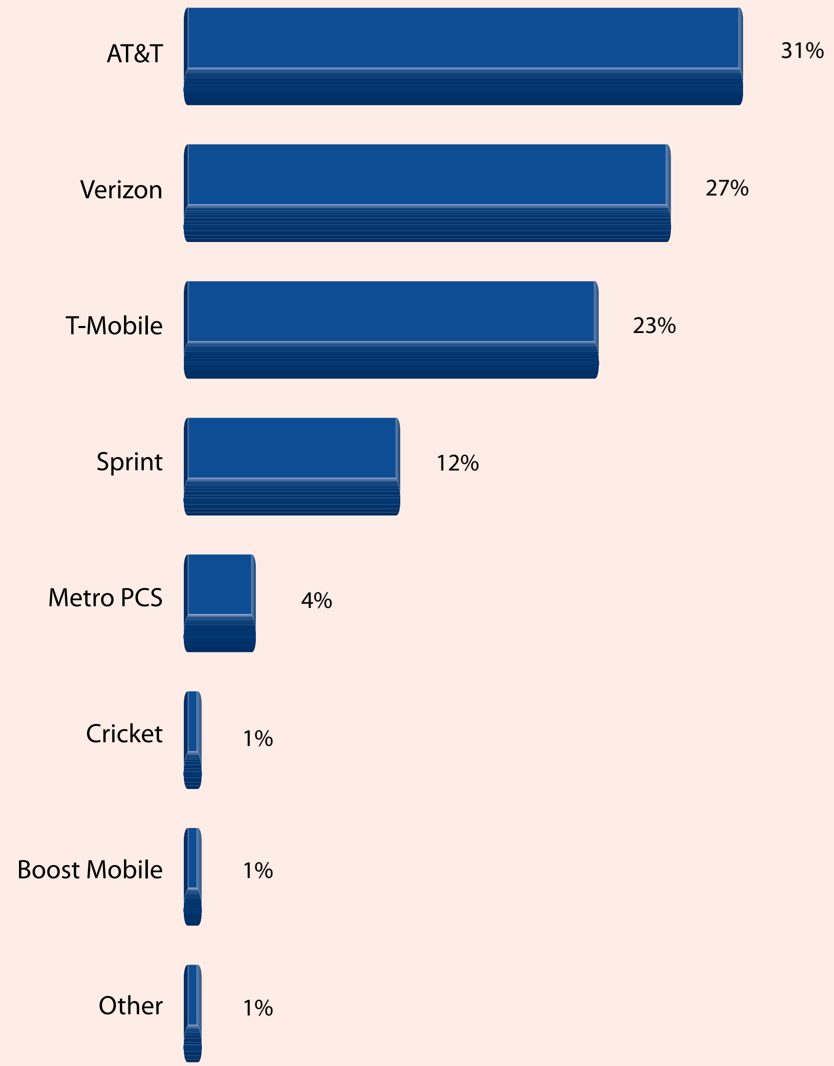


Telecommunications Brand Preferences

Smart phone or tablet used most often (among owners)

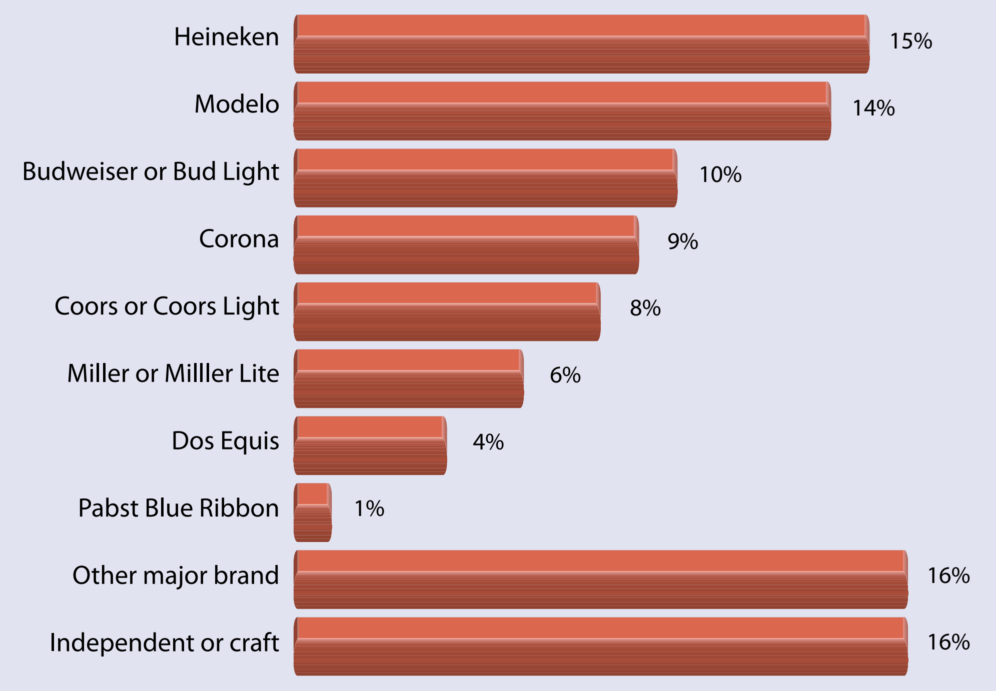


Wireless service provider (among users)

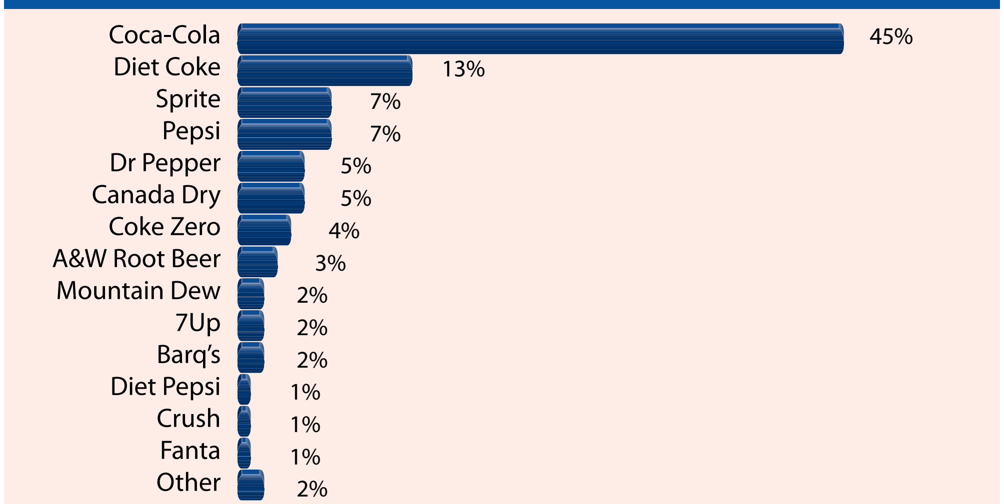


Beverage Brand Preferences

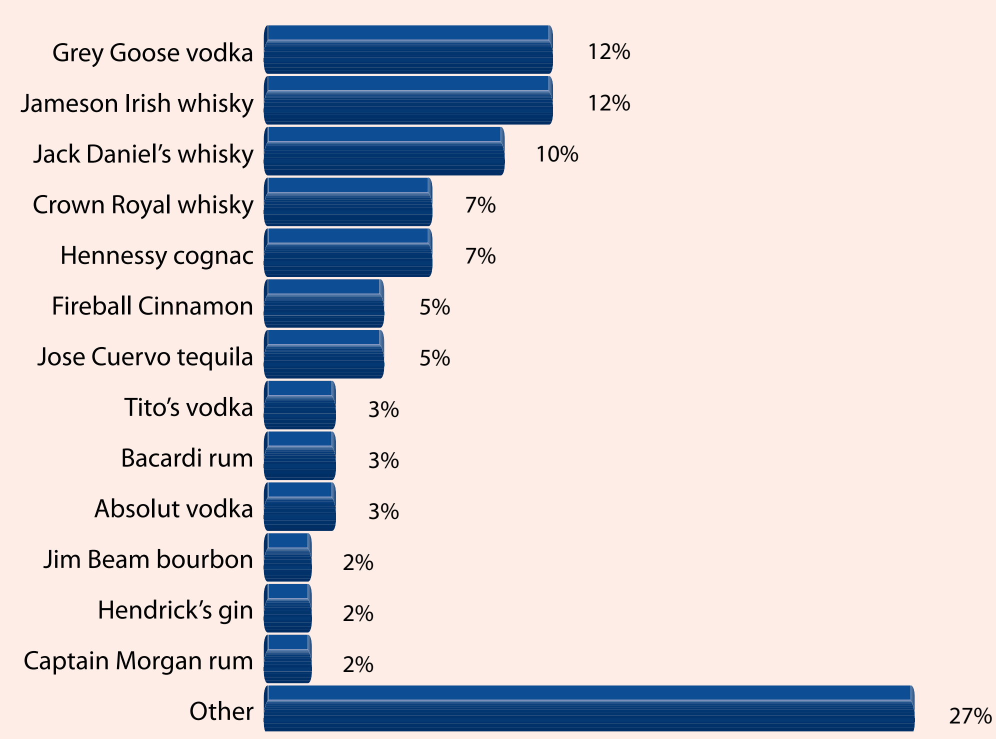
Beer brand drink most often (among beer drinkers)



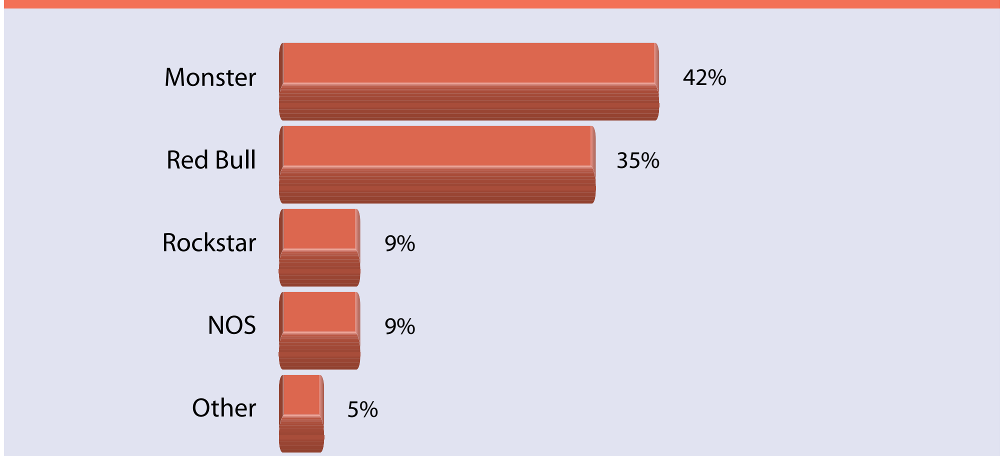
Soda or soft drink brand drink most often (among soda drinkers)



Preferred liquor or spirits brand (among liquor drinkers)

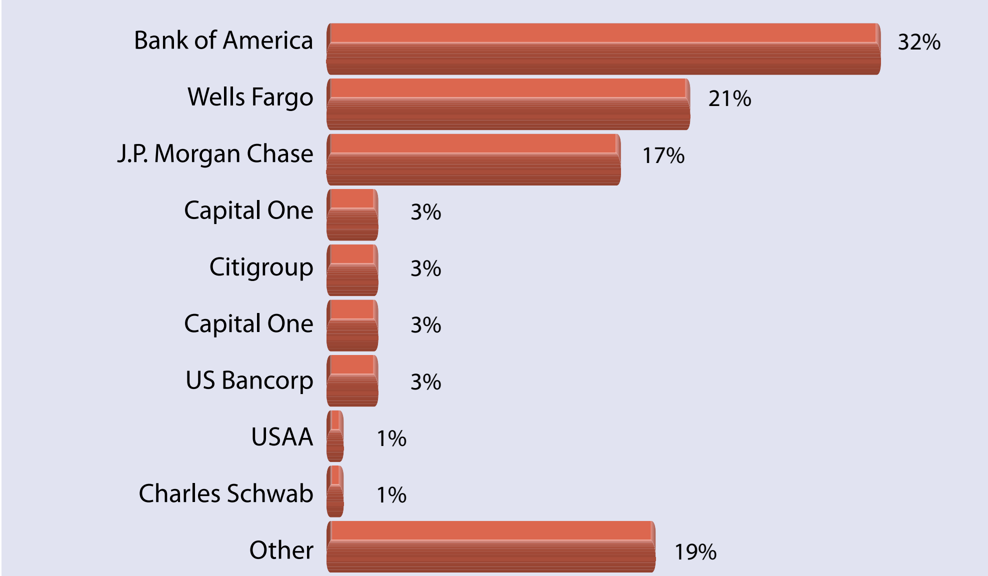


Preferred energy drink brand (among energy drink consumers)

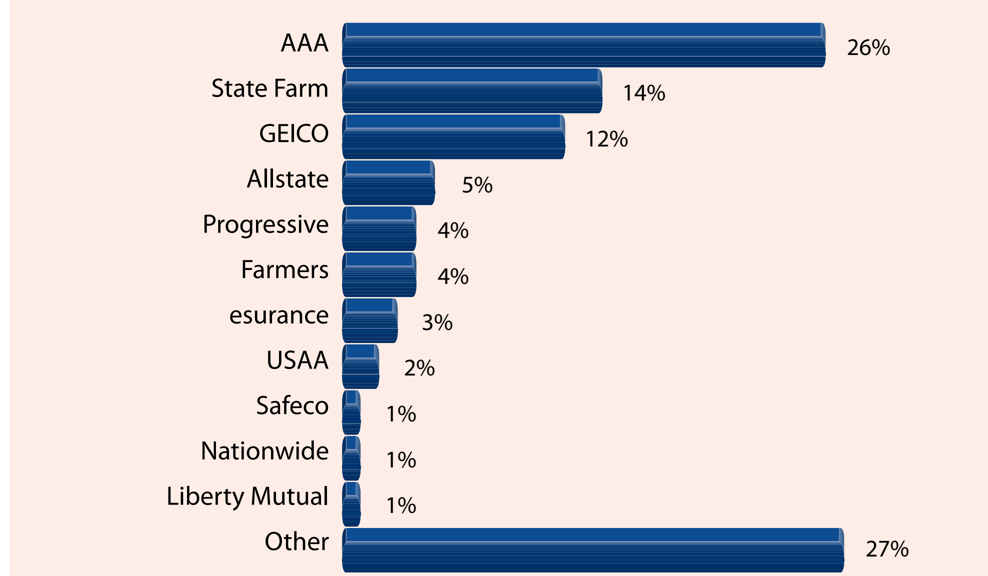


Bank, Insurance, and Airline Brand Preferences

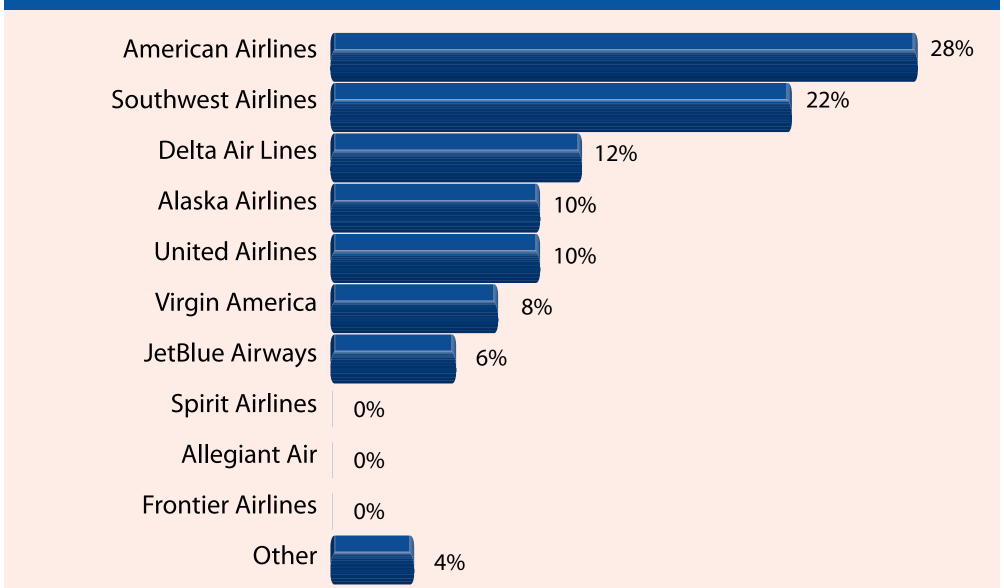
Bank used most often



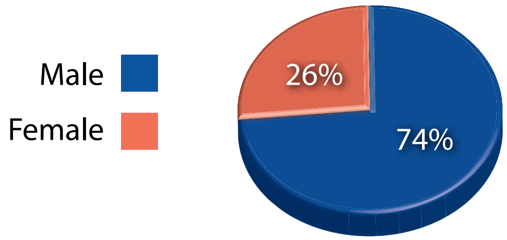
Auto insurance company

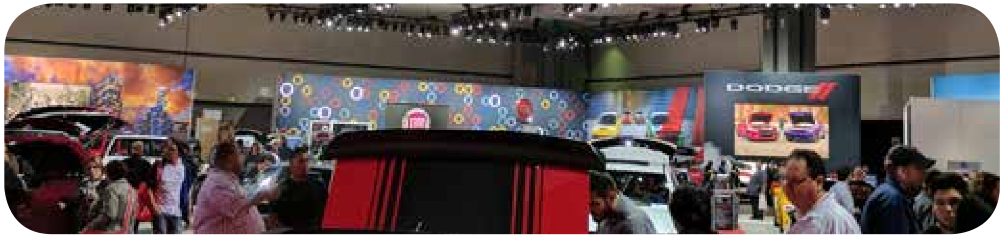


Preferred US airline (among those flying within 30 days)

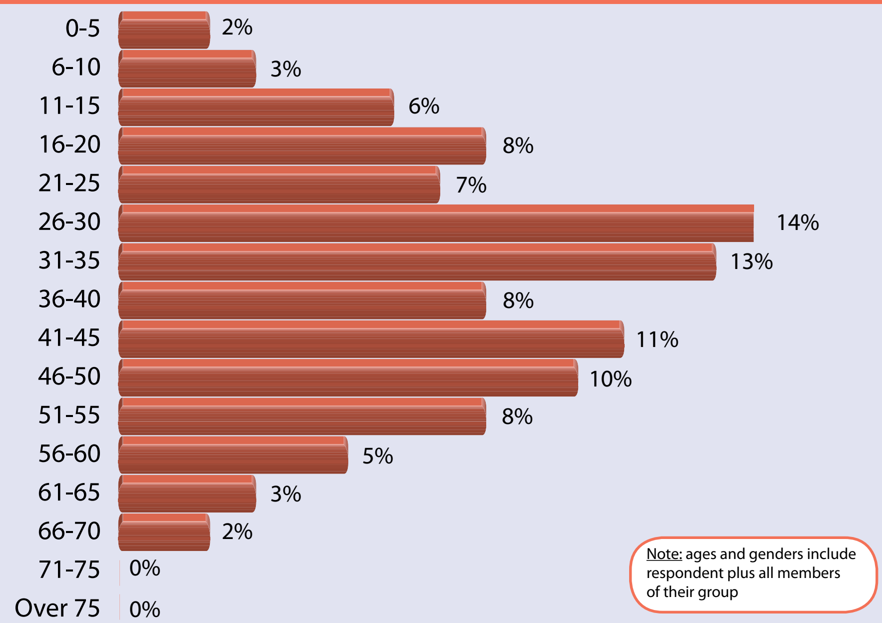


Demographics of Attendees

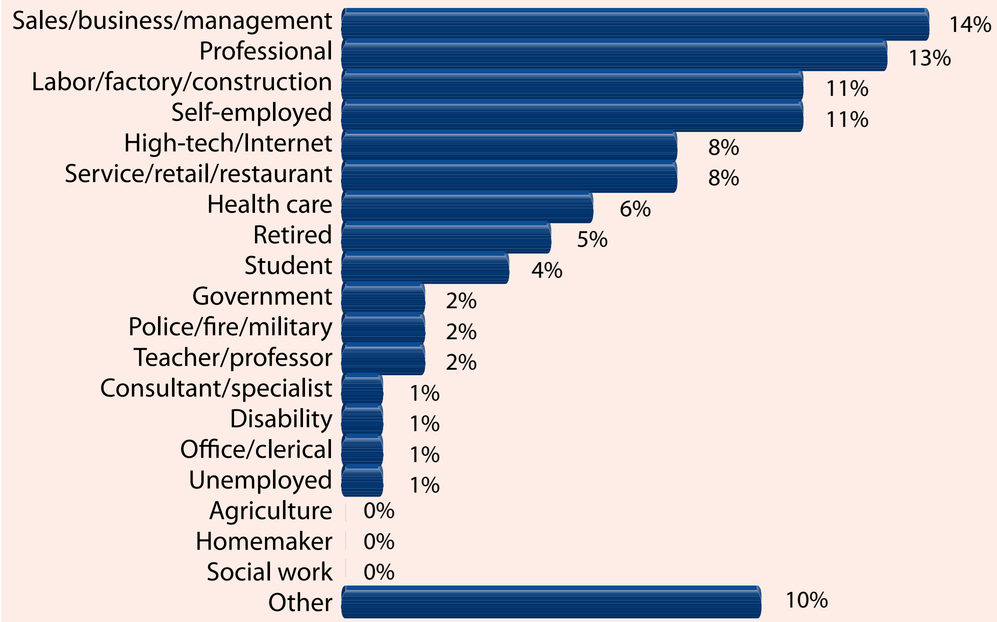




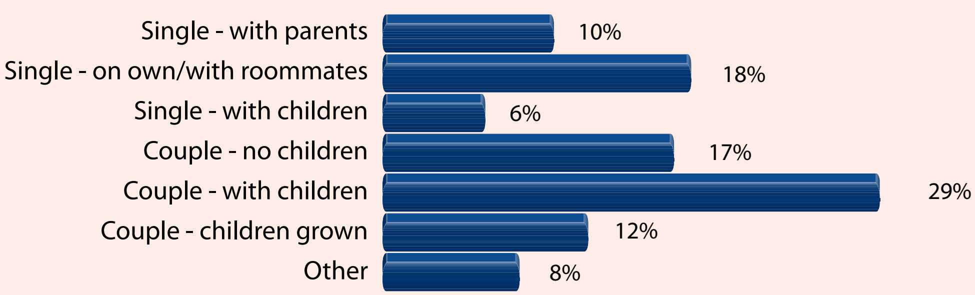
Age categories



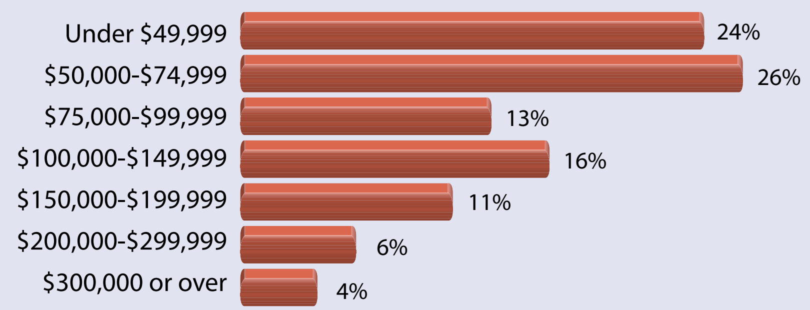
Occupation



Current living situation



Household income (before taxes)

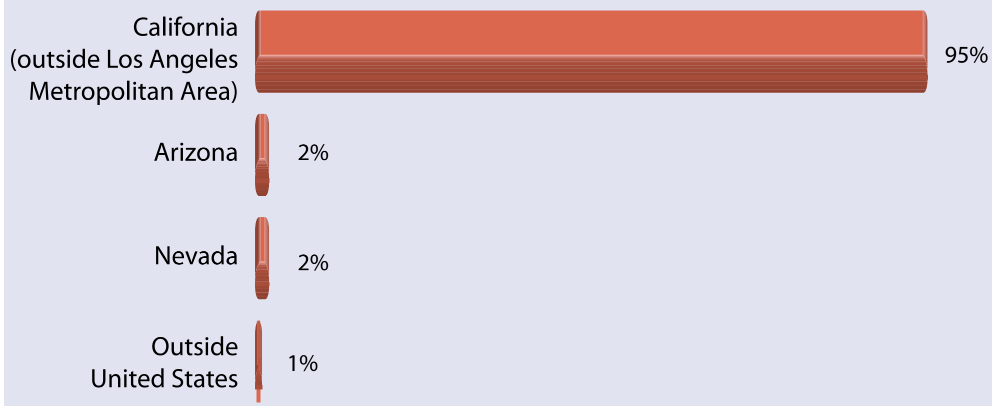


Tourism and Economic Impact

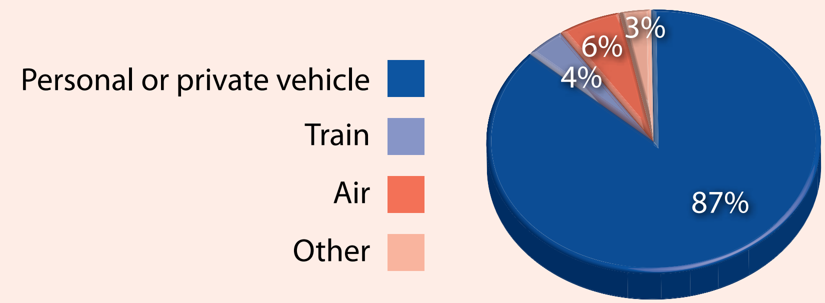
Estimated attendance	
Total person-visits (from published attendance)	900,000
Average visits per person	1.2 visits
Estimated unique attendees	**750,000**
Total locals (Los Angeles Metropolitan Area)	532,500 (71%)
Total non-locals (outside Los Angeles Metropolitan Area)	217,500 (29%)
Estimated unique attendees	**750,000**

Average nights stayed (all non-locals)	**0.5 nights**
Attendee hotel/motel room nights	**58,500**

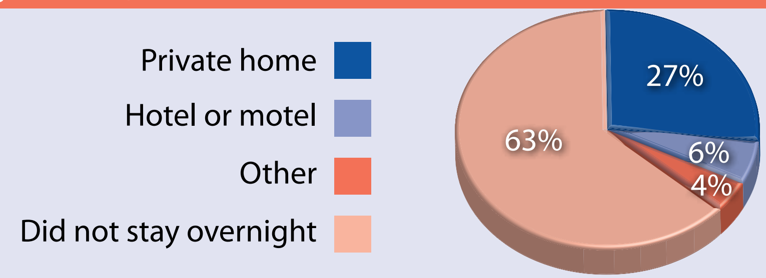
Place of residence (among non-locals)



Transportation to Los Angeles Metropolitan area (among non-locals)



Accommodations in Los Angeles Metropolitan area (among non-locals)



Economic Impact of Attendees

Total spending by non-locals	**$28.1M**
Economic impact (Industry output)	**$50.7M**
Direct and indirect	$40.6M
Induced	$10.1M
Total employment supported (full-year job equivalents)	**620**
Total taxes supported	**$9.3M**
Federal	$3.5M
State	$3.4M
Local	$2.4M

Spending by non-local attendees	
Accommodations	$8,300,000
Admission tickets	$3,200,000
Groceries	$3,100,000
Restaurants outside venue	$2,900,000
Parking, fuel, and repairs	$2,800,000
Shopping and retail	$2,100,000
Concessions at venue	$2,100,000
Other entertainment	$1,800,000
Car rentals	$1,100,000
Retail clothing	$500,000
Public transit or taxis	$100,000
Ride share services	$100,000
Total spending by non-locals	**$28,100,00**

Spending by local attendees (not economic impact)	
Concessions at venue	$10,100,000
Admission tickets	$7,600,000
Restaurants outside venue	$4,800,000
Parking and fuel	$4,500,000
Shopping and retail	$2,800,000
Ride share services	$2,100,000
Public transit or taxis	$1,200,000
Retail clothing	$300,000
Total spending by locals	**$33,400,000**

Comments from Attendees

"A food truck court would be very nice"

"A short track or autocross course would be great for sports car enthusiasts"

"Adding knowledgeable greeters would help get proper info to general public"

"Been going every year for the past 7 years"

"Fewer eye-catching concepts than years before"

"Great experience for the family "

"I didn't enjoy the show as much because kids were all over the vehicles"

"I have noticed a significant decline in the quality of the displays. While there is an increase in multimedia not one display left me in awe."

"I was expecting more things going on like concerts or raffles"

"I would like to see more electric and customized cars"

"It was my first time and it was a great experience"

"It's a family tradition for us"

"Need to provide more information on test drives"

"Our favorite part was The Garage with the vendors and interactive experiences"

"Please bring back more free swag/promotional items; I miss those days! "

"The Friday morning early entry allowed me to take hundreds of pictures without the general public getting in my way"

"The main reason to go is to test drive new vehicles, however this year there were many brands missing from the test drives"

"The new cutting edge stuff should be premiered in LA. We are the automobile capital of the world."

"This was the most disappointing one I have been to! I go to see the wild concept vehicles and this year I saw NONE!!"

"Vehicle I mainly went to see was gone for the day; Audi A5/S5 Sportback was loaned to the press"

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	Approximately 600 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.