

ENIGMA INDEPENDENT EVENT AUDITS

Unbiased Intelligence for Senior Marketers

2017 AUSTIN CITY LIMITS MUSIC FESTIVAL

Austin, Texas

October 6-8 and 13-15, 2017



enigma
research



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Most popular reasons for attending

- 1 To see a specific artist or artists
- 2 Enjoy the festival atmosphere
- 3 Enjoy all types of music

Most popular features within brand activations

- 1 Honda Rebel motorcycle
- 2 Aviator Nation merchandise display
- 3 Tito's Plinko Parlor free merchandise

Most popular performers

- 1 Red Hot Chili Peppers
- 2 The Killers
- 3 Jay-Z

Most popular feature attractions

- 1 ACL Eats
- 2 Camelbak Hydration Stations
- 3 Festival Stores

Most recalled sponsors

- 1 American Express
- 2 Honda
- 3 Miller Lite

Most popular brands used

- Vehicle: Toyota
- Soda: Coca-Cola
- Cigarettes: Camel and Marlboro

Most visited brand activations

- 1 Red Bull and Water Stations
- 2 Honda X Waterloo Records Signing Stage and Record Store
- 3 Tito's Plinko Parlor

Tourism and economic impact

- Percentage non-local: 33%
- Estimated hotel room nights: 22,700
- Estimated economic impact: \$49.6M

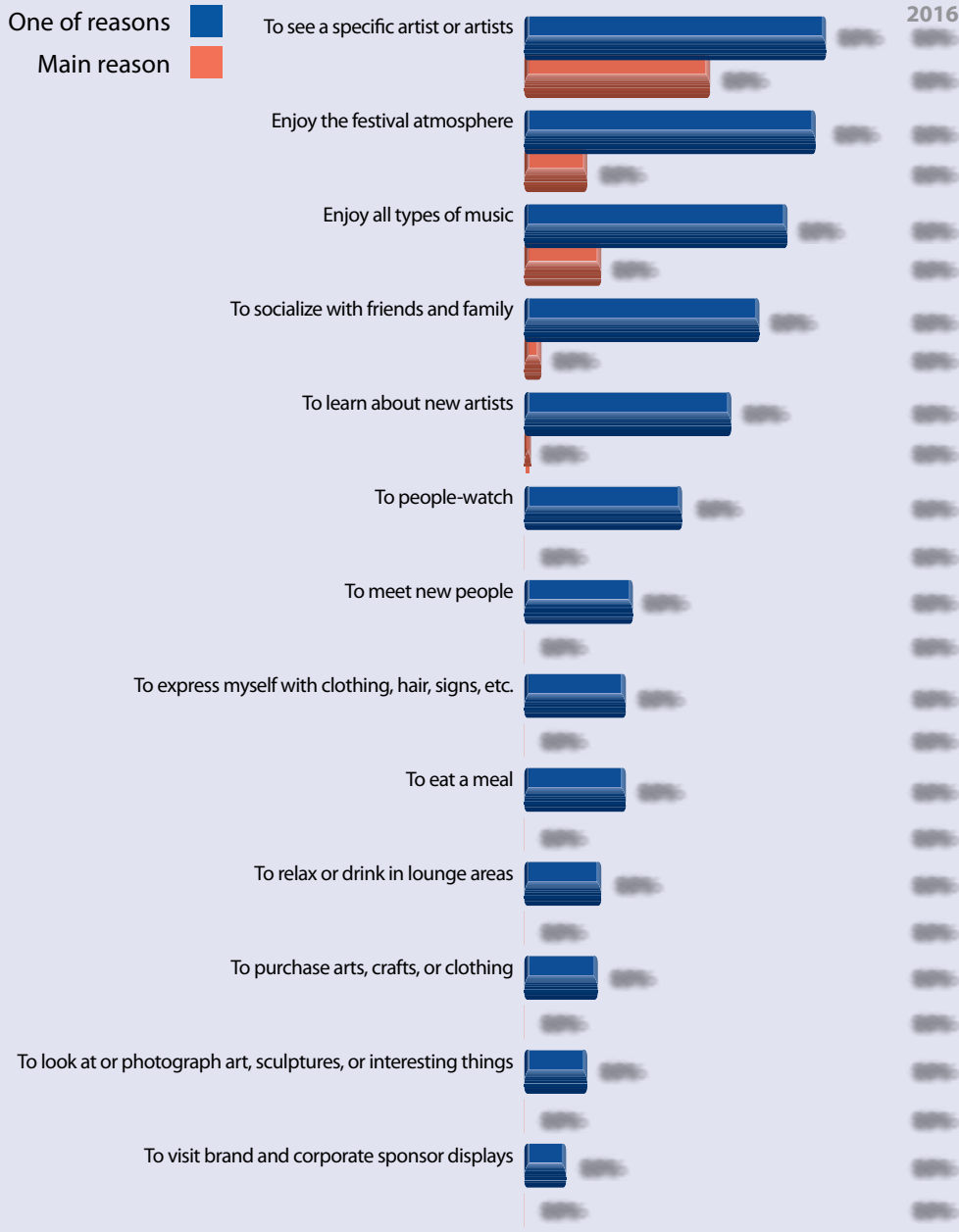
Most appreciated brand activations

- 1 State Farm #HERETOHELP
- 2 HomeAway UpsideDown House
- 3 Honda X Waterloo Records Signing Stage and Record Store

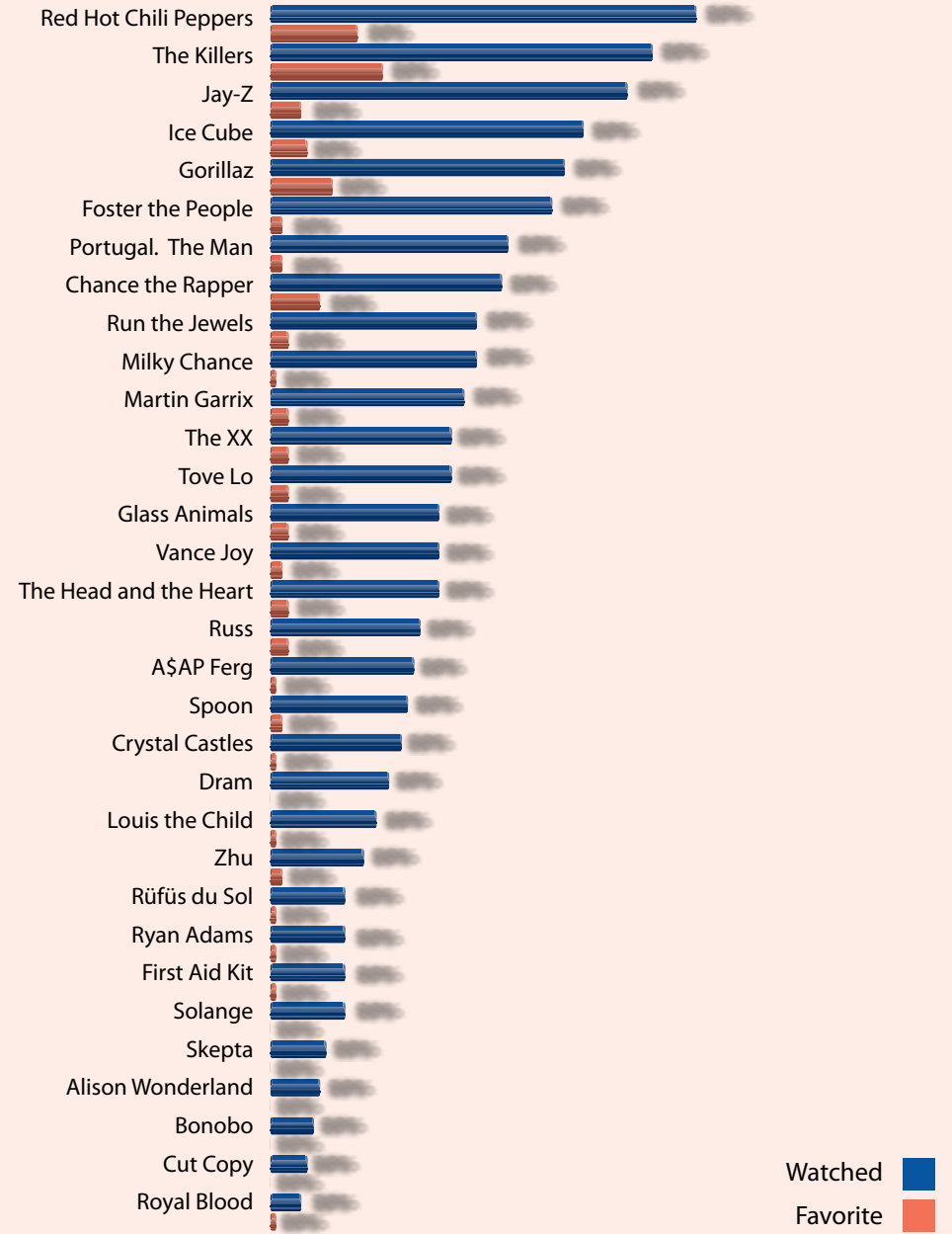
Best attendee comments

- "ACL has been my family reunion for 11 years. I can't imagine a sibling reunion without the music, beer, laughing, and life-loving experience."
- "Amex Experience Lounge was the single best amenity at ACL and greatly added to my experience!"
- "Stay weird!"

Reasons for attending event (aided)

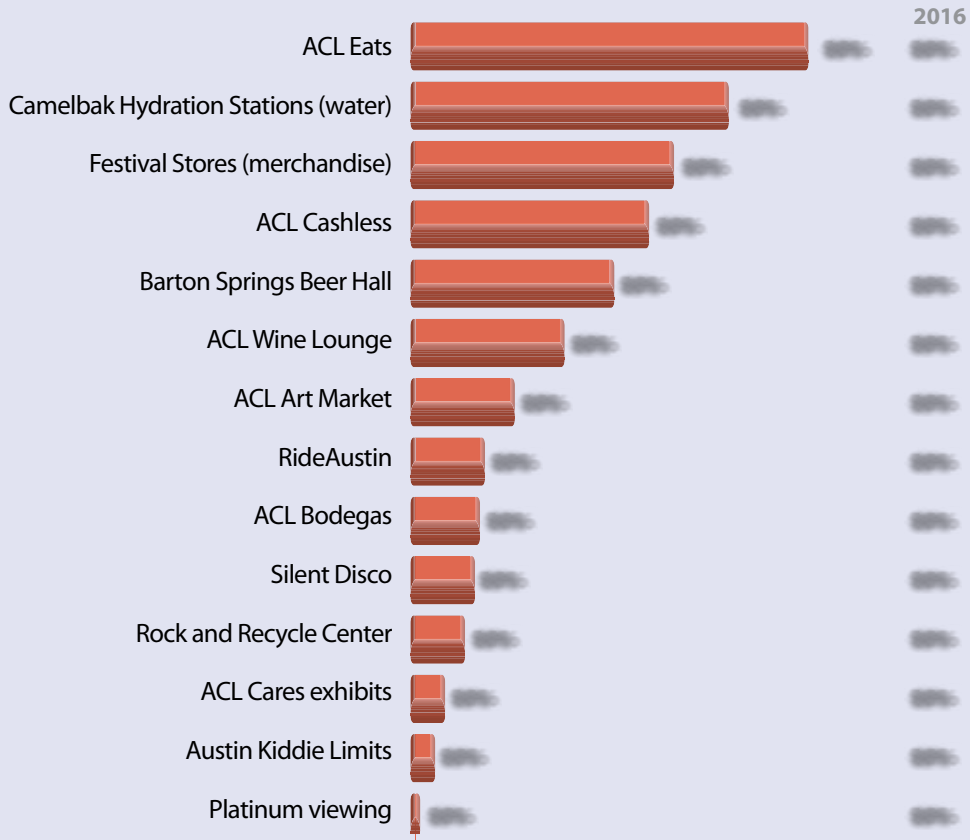


Performances watched (aided)



Event Experience

Featured attractions visited



Event ratings

■ excellent
 ■ good
 ■ fair
 ■ poor



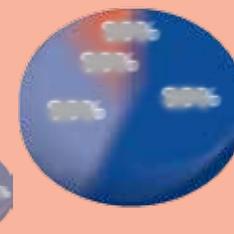
Quality of entertainment



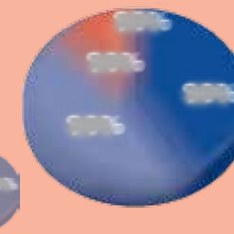
Variety of entertainment



Variety of food and beverage



Quality of food and beverage



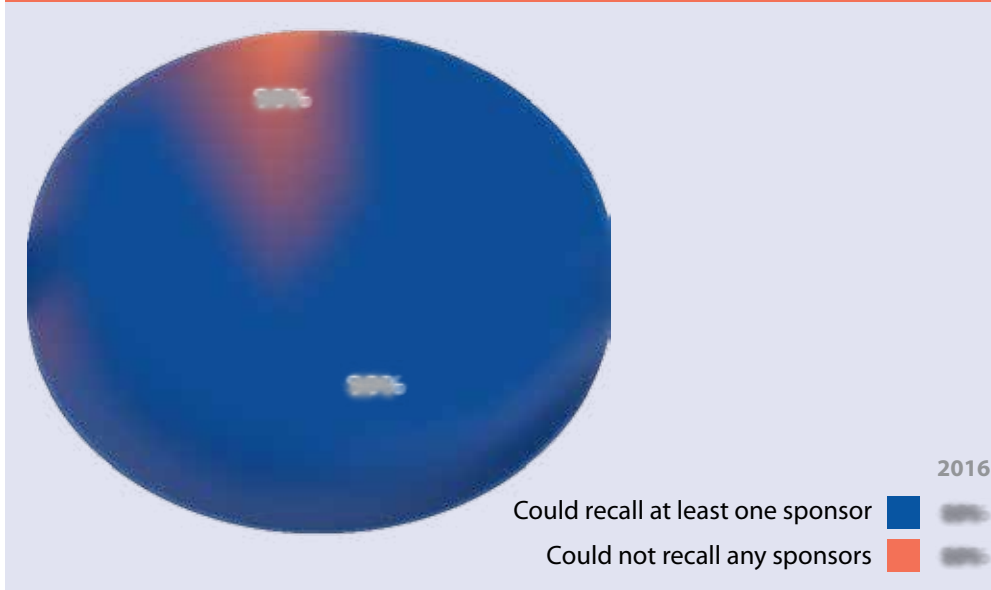
Cleanliness



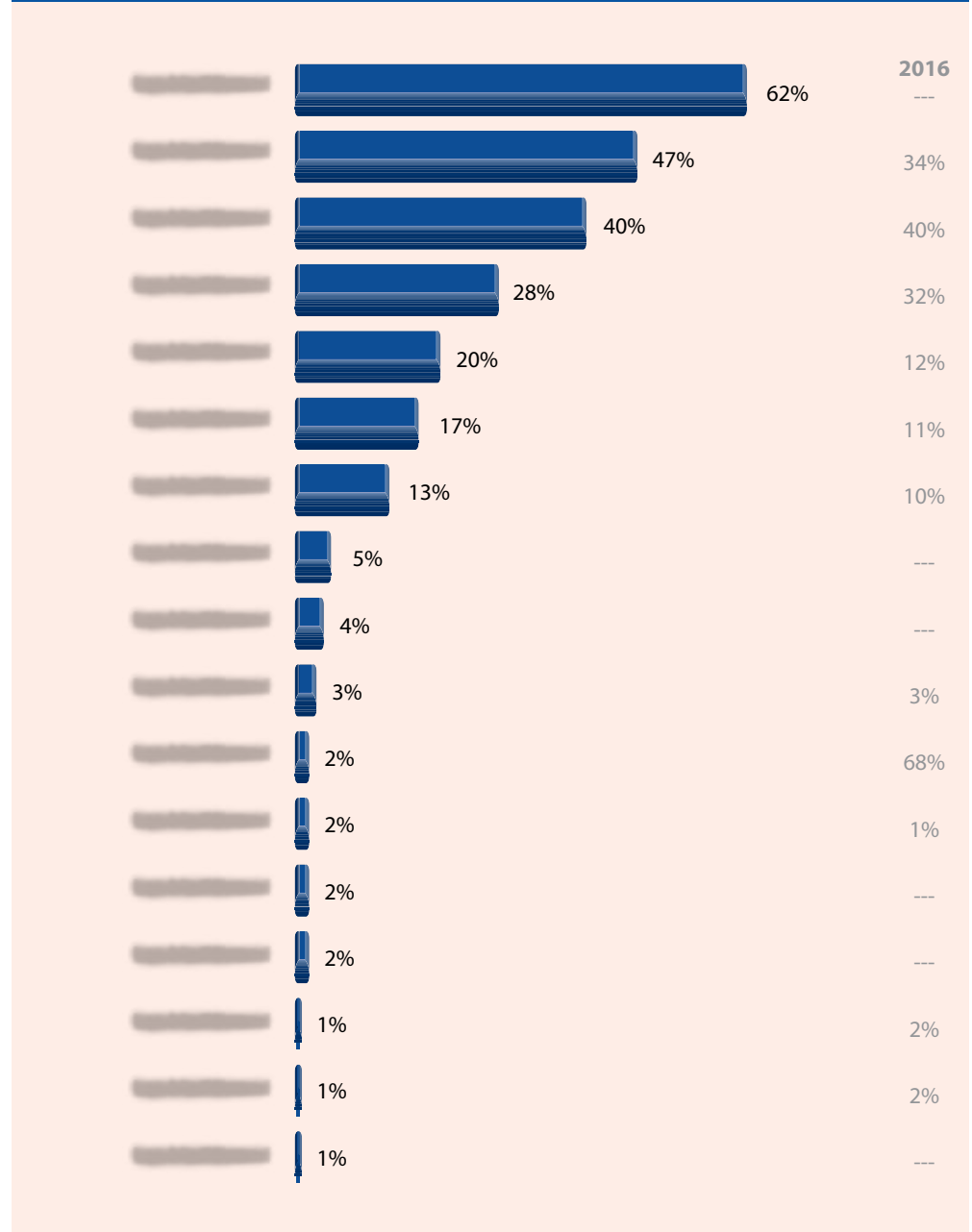
Value for admission price

Sponsor Recall and Appreciation

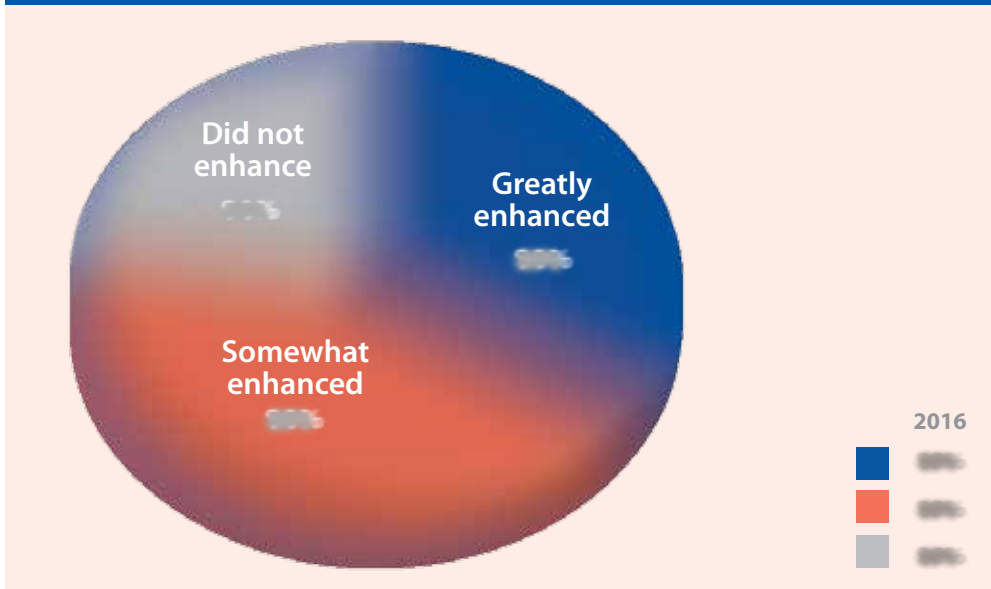
Sponsor recall



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



Extent to which brands and corporate sponsors enhanced experience



Activation Evaluations



Red Bull and Water Stations

PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION

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

ACTIONS TAKEN (among those who entered)

Purchased water	<input type="checkbox"/>
Purchased Red Bull	<input type="checkbox"/>
Purchased Vita Coco	<input type="checkbox"/>
Purchased Red Bull and Vita Coco combo	<input type="checkbox"/>

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

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

MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT

(among those who entered)

Red Bull preferred brand	<input type="checkbox"/>
Other preferred brand	<input type="checkbox"/>



Honda X Waterloo Signing Stage and Record Store

2

2016

1

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

Looked at Honda Civic	<input type="checkbox"/>
Purchased vinyl or CDs	<input type="checkbox"/>
Received autographs from artists	<input type="checkbox"/>
Took photos with artists	<input type="checkbox"/>
Sat in Honda Civic	<input type="checkbox"/>
Purchased other products	<input type="checkbox"/>
Used \$8 bag check service	<input type="checkbox"/>

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

Honda-Acura owners	<input type="checkbox"/>
Other owners	<input type="checkbox"/>



Activation Evaluations



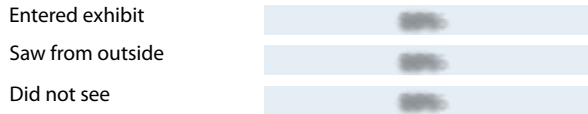
Tito's Plinko Parlor

3

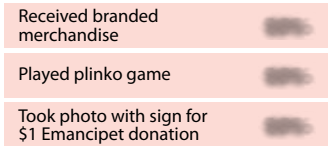
PARTICIPATION RANKING

ENHANCEMENT RANKING

PARTICIPATION



ACTIONS TAKEN (among those who entered)

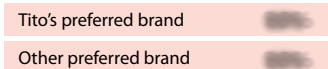


EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)



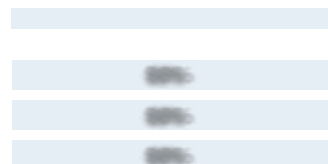
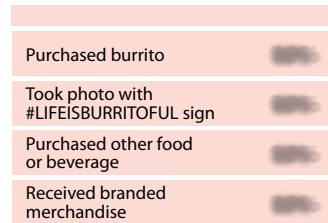
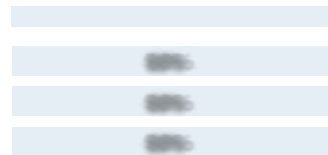
MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT

(among those who entered)



Chipotle Mexican Grill

4



Activation Evaluations



Miller Lite Bar 75



American Express Experience



State Farm #HERETOHELP



PARTICIPATION RANKING

5

2016

3

6

7

2016

5

ENHANCEMENT RANKING

3

3

3

3

3

PARTICIPATION

Entered exhibit	Miller Lite	American Express	State Farm
Saw from outside	Miller Lite	American Express	State Farm
Did not see	Miller Lite	American Express	State Farm

ACTIONS TAKEN (among those who entered)

Purchased Miller Lite	Used charging stations	Received State Farm merchandise
Relaxed with friends or family	Received bandana	Used charging stations
Purchased other beverages	Saw giant armadillo craft	Learned about State Farm causes and volunteering
Looked at can display on wall	Visited Cardmember area (upstairs)	Relaxed with friends or family
Used complimentary wi-fi	Registered for ACL Cashless	Used tablets to scan posters on wall
Wrote on What's Your Jam wall	Took "boomerang" photo with bat wings	Watched stage performance
Received Miller Lite merchandise	Received flag craft	Assembled musician travel kit
	Visited member desk	Received bandage or emergency supply
	Received embroidery service	Used lockers

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	Miller Lite	American Express	State Farm
Somewhat enhanced	Miller Lite	American Express	State Farm
Did not enhance	Miller Lite	American Express	State Farm

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

Miller preferred brand	All who entered	State Farm customers
Other preferred brand		Other customers



Activation Evaluations



Honda Rebel motorcycle

8



Homeaway UpsideDown House

9



Aviator Nation Store

10



PARTICIPATION RANKING

8

9

10

ENHANCEMENT RANKING

8

9

10

PARTICIPATION

Entered exhibit	80%	80%	80%
Saw from outside	80%	80%	80%
Did not see	80%	80%	80%

ACTIONS TAKEN (among those who entered)

Looked at Honda Rebel	80%	Took upsidedown photo	80%	Looked at Aviator Nation merchandise	80%
Used photo kiosk	80%	Received branded merchandise	80%	Spoke with representative	80%
Received branded merchandise	80%	Registered at entrance	80%	Purchased Aviator Nation merchandise	80%
		Received photo via email or text	80%		

EXTENT ENHANCED EVENT EXPERIENCE (among those who entered)

Greatly enhanced	80%	80%	80%
Somewhat enhanced	80%	80%	80%
Did not enhance	80%	80%	80%

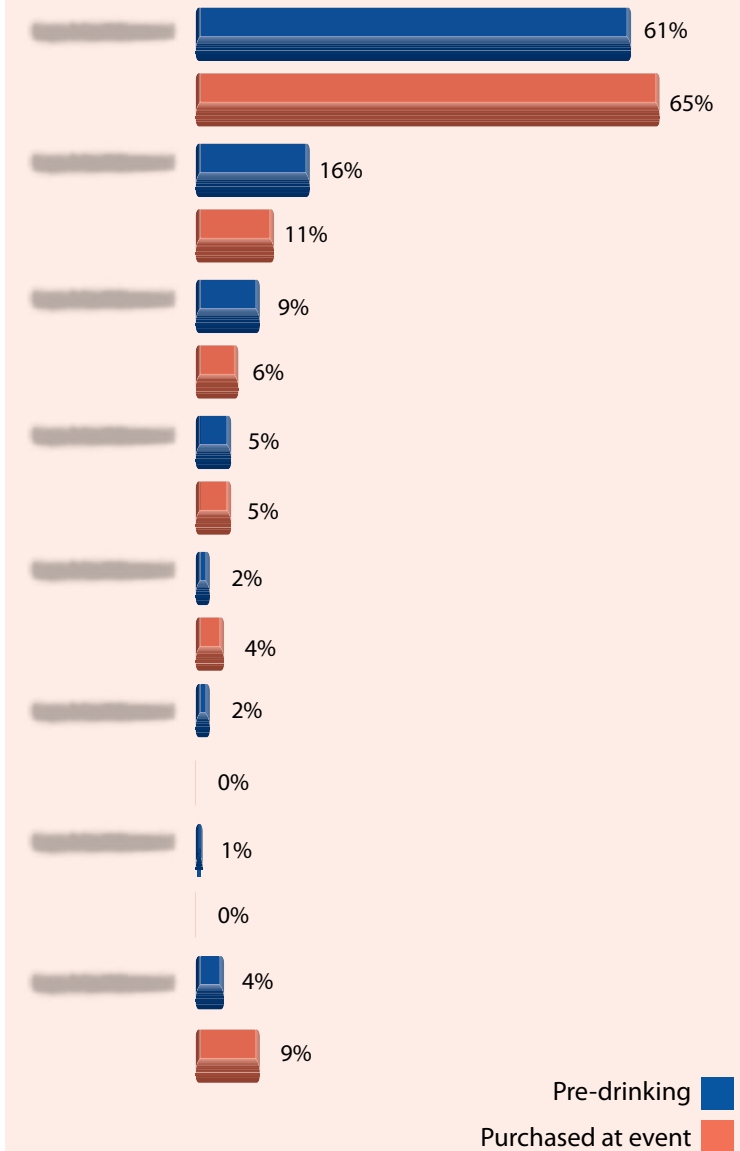
MORE LIKELY TO PURCHASE THAN BEFORE THE EVENT (among those who entered)

All who entered	80%	Locals	80%	All who entered	80%
		Non-locals	80%		

Beverage Consumption

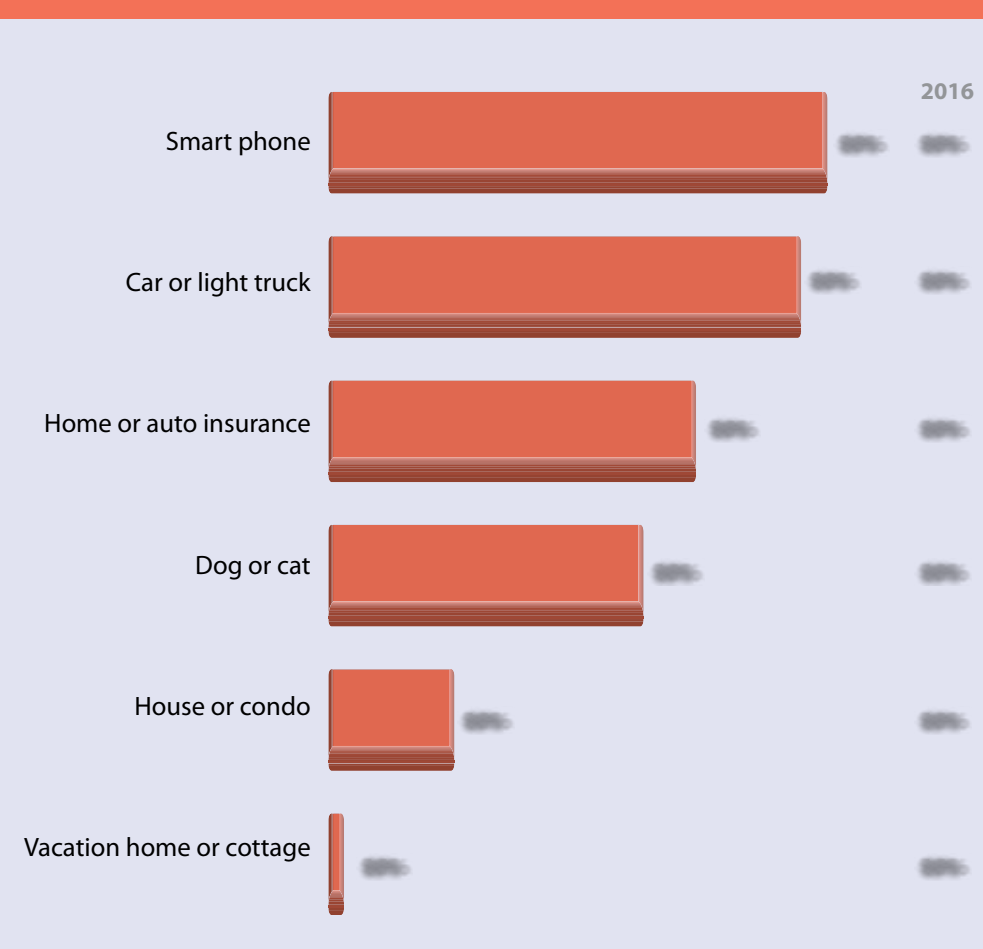
Beverages consumed on-site	Pre-drinking		Purchased at event	
	Percentage consumed	Average daily consumption at event (among consumers)	Percentage consumed	Average daily consumption at event (among consumers)
Free water from stations				
Beer				
Bottled or boxed water				
Wine or wine drinks				
Soda				
Liquor or spirits				
Juice				
Energy drinks				
Coffee or coffee drinks				
Other beverages				

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

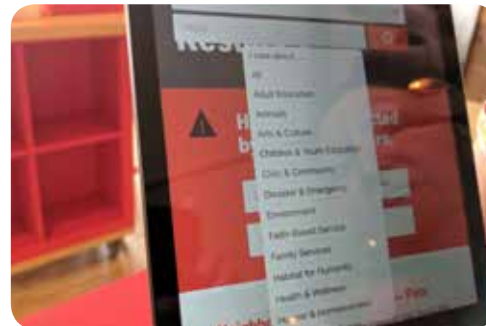
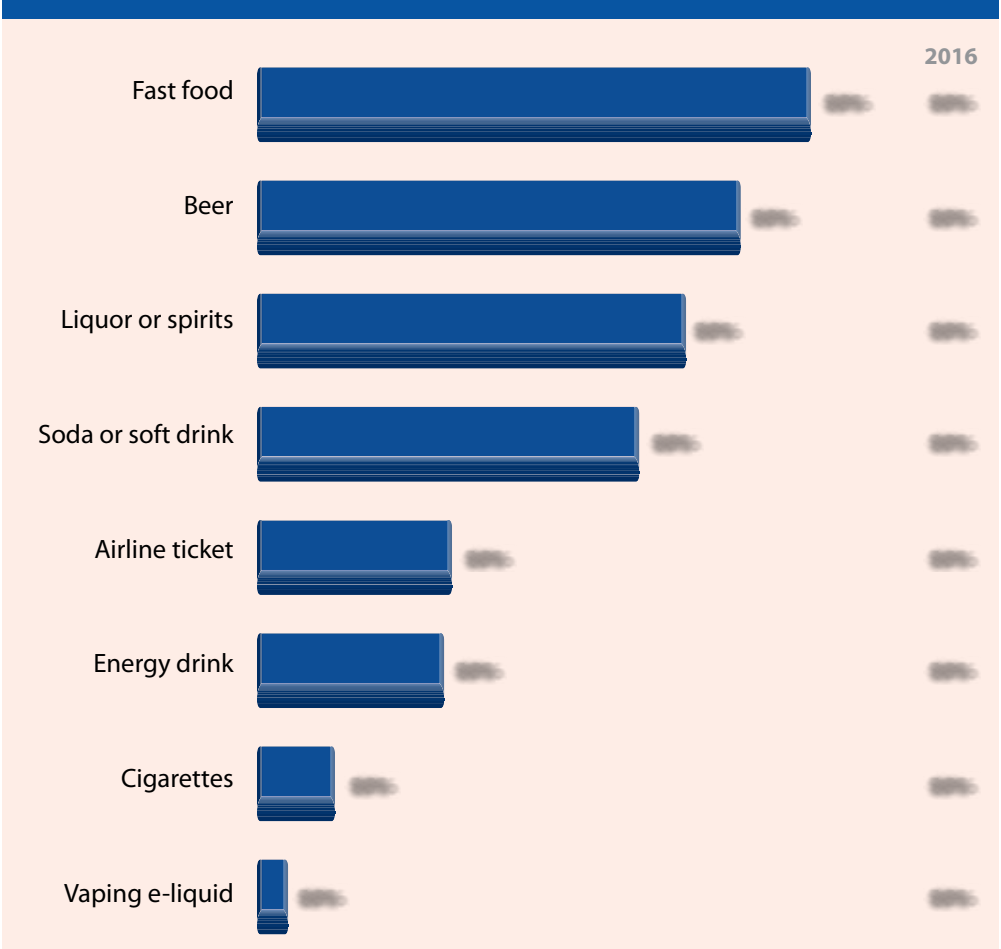


Product Ownership and Use

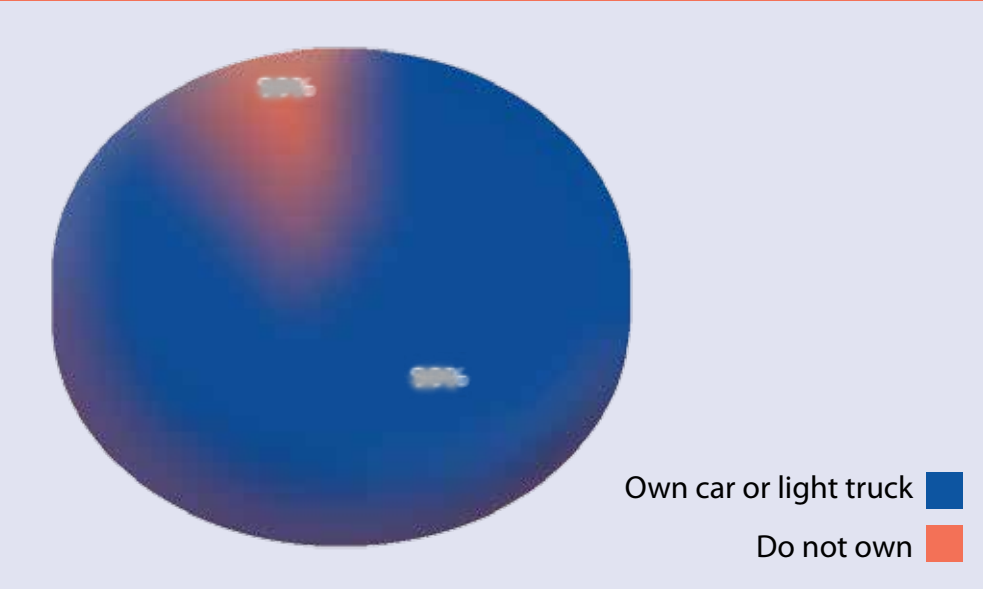
Product ownership



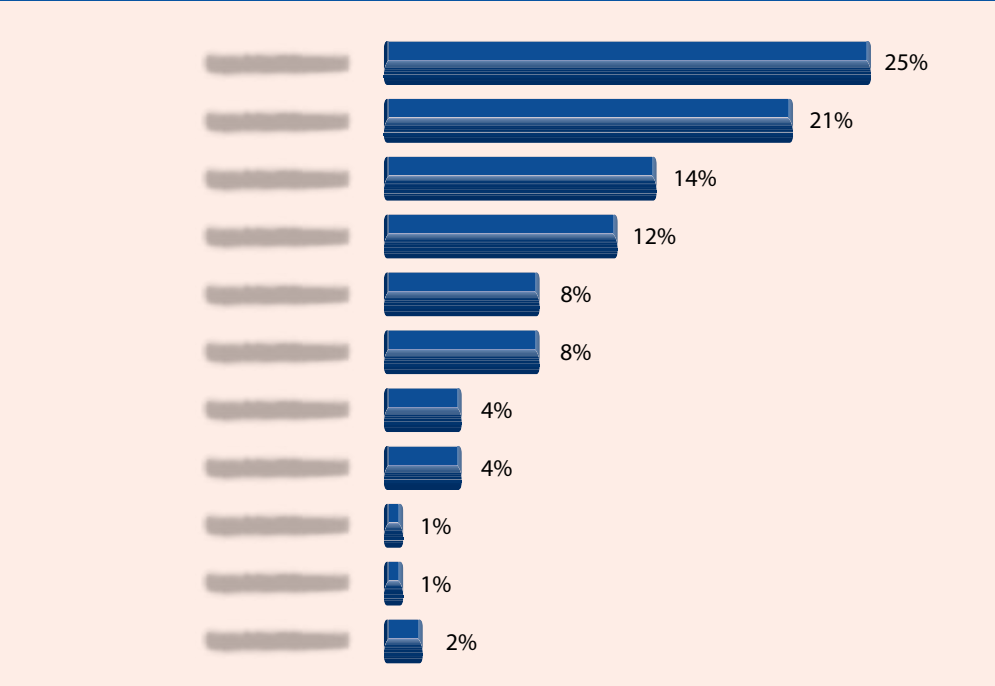
Products purchasing within next 30 days



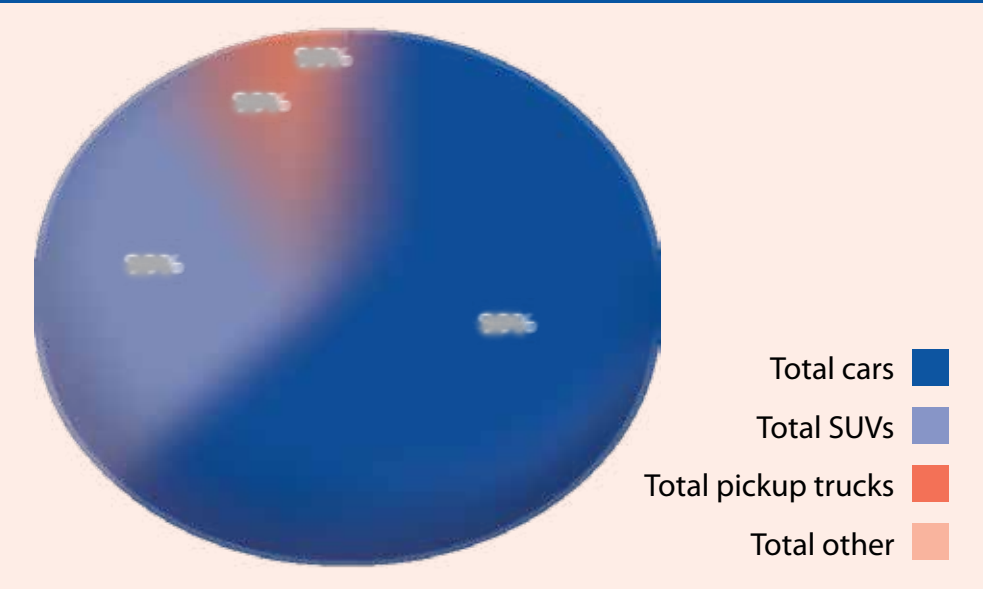
Vehicle ownership



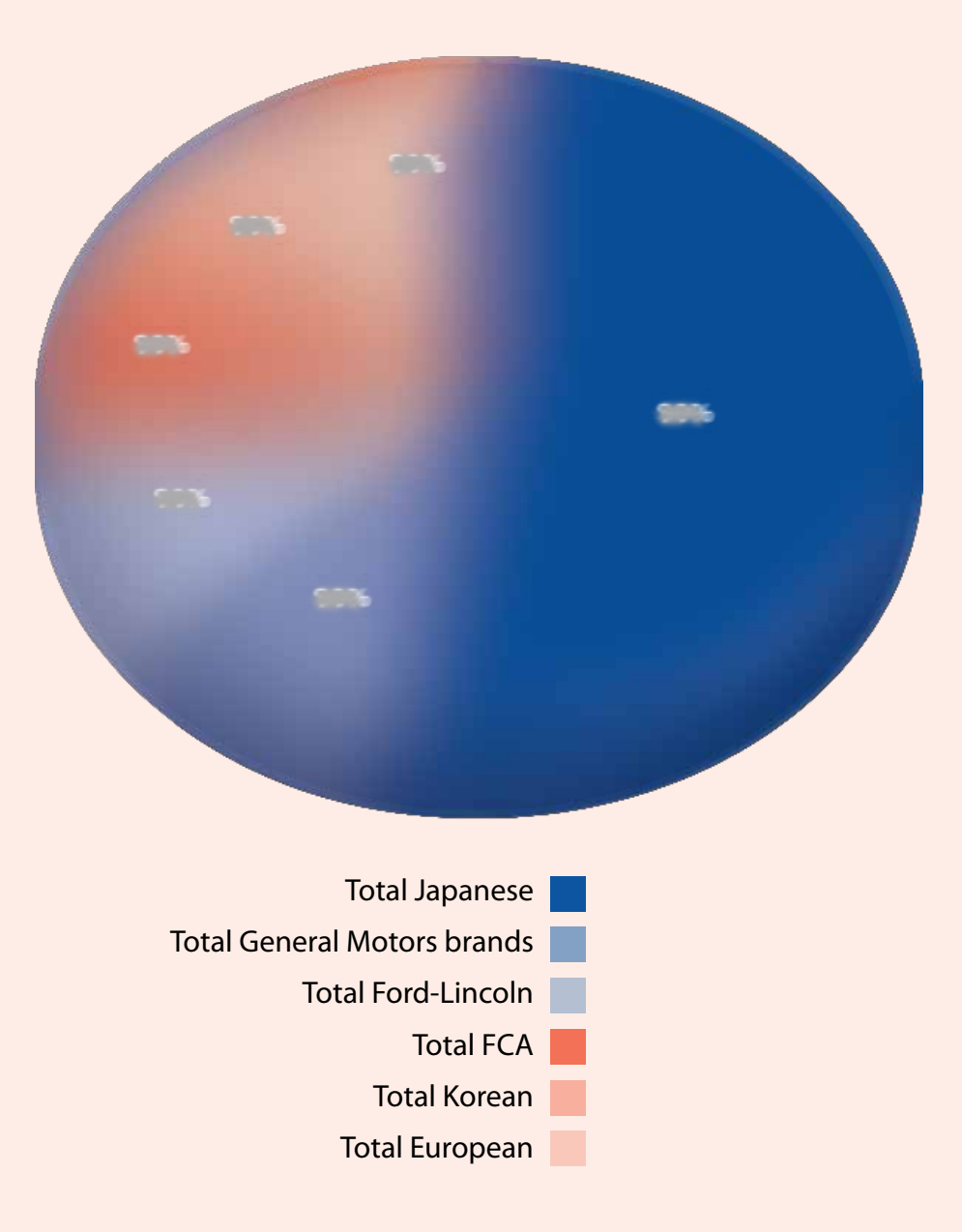
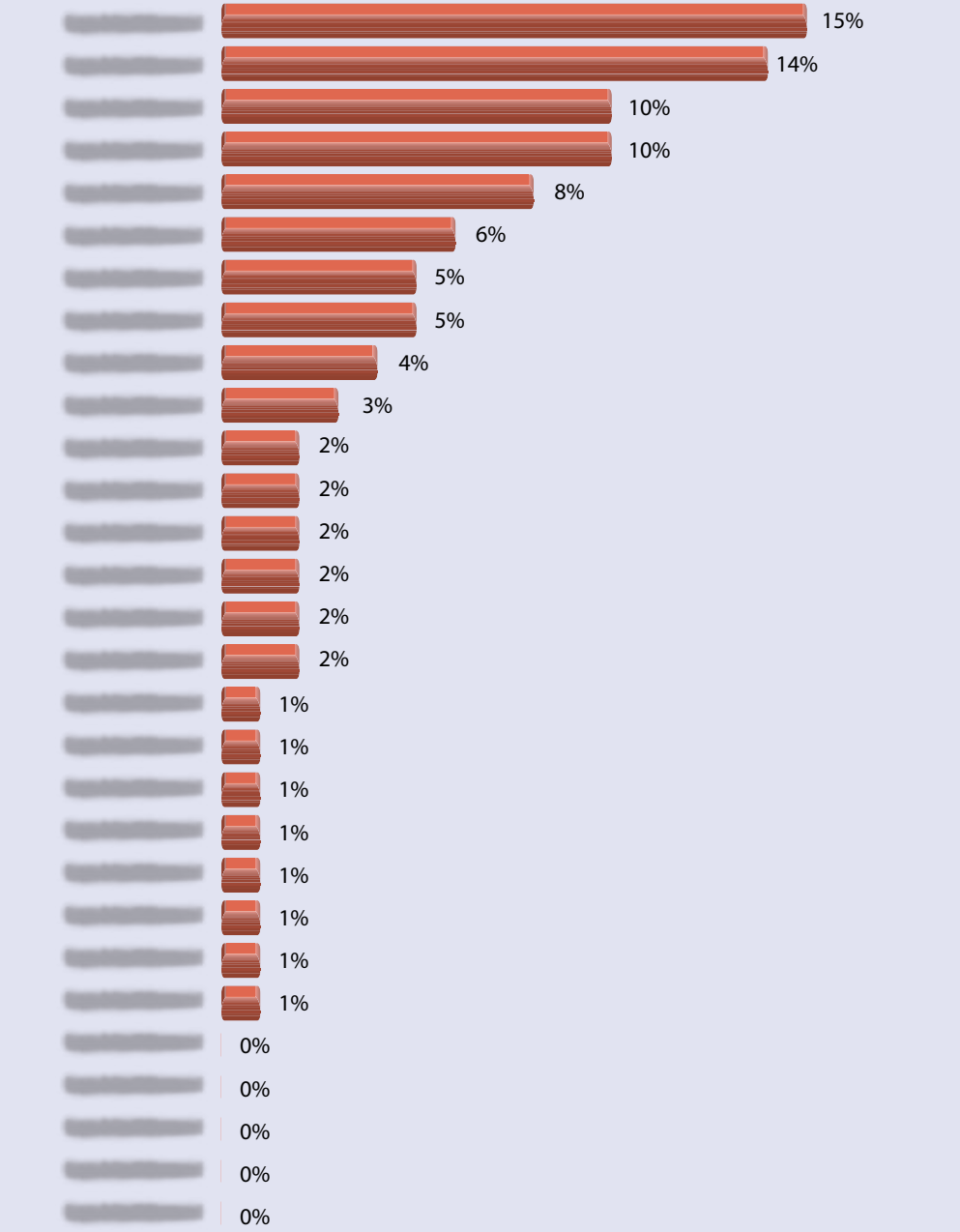
Type of vehicle driven (among owners)



Total vehicles

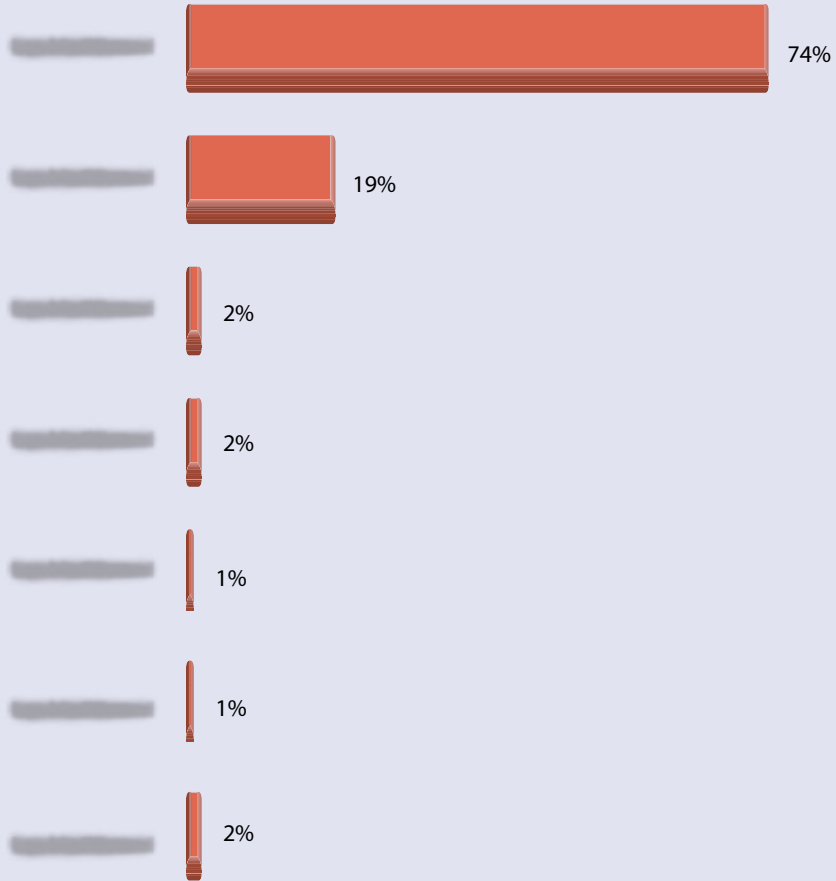


Brand of Vehicle Driven (among owners)

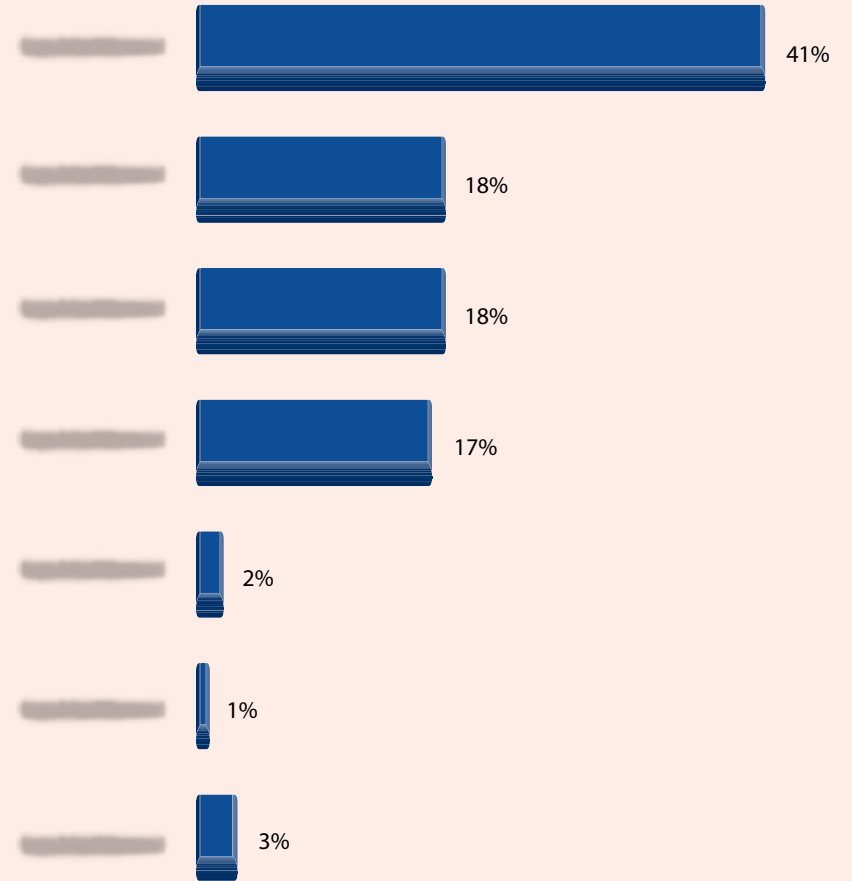


Telecommunications Brand Preferences

Smart phone or tablet used most often (among owners)

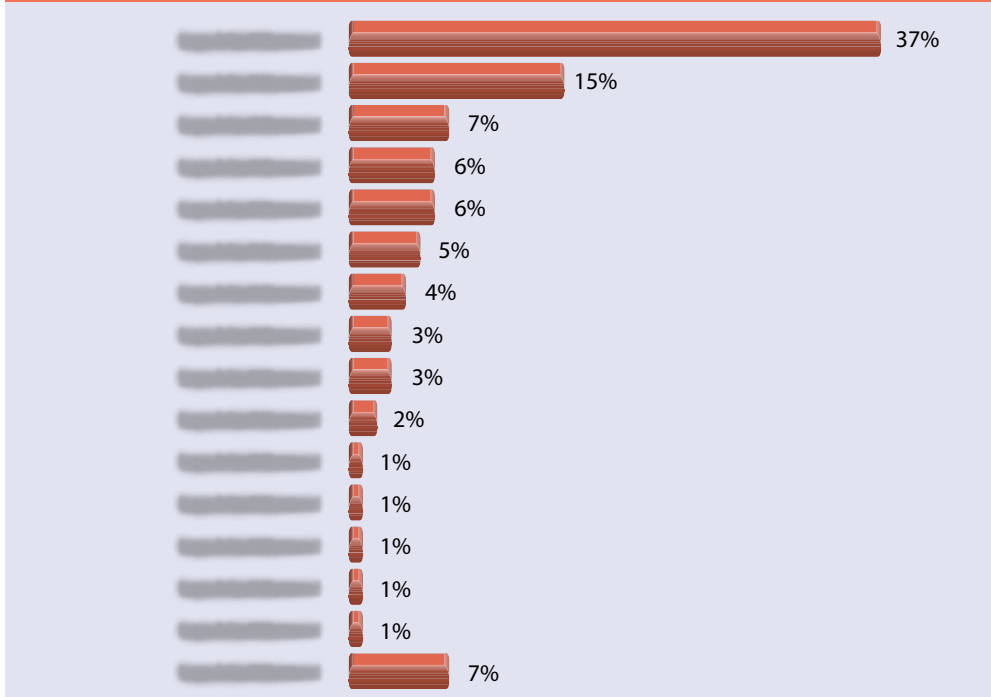


Wireless service provider (among users)

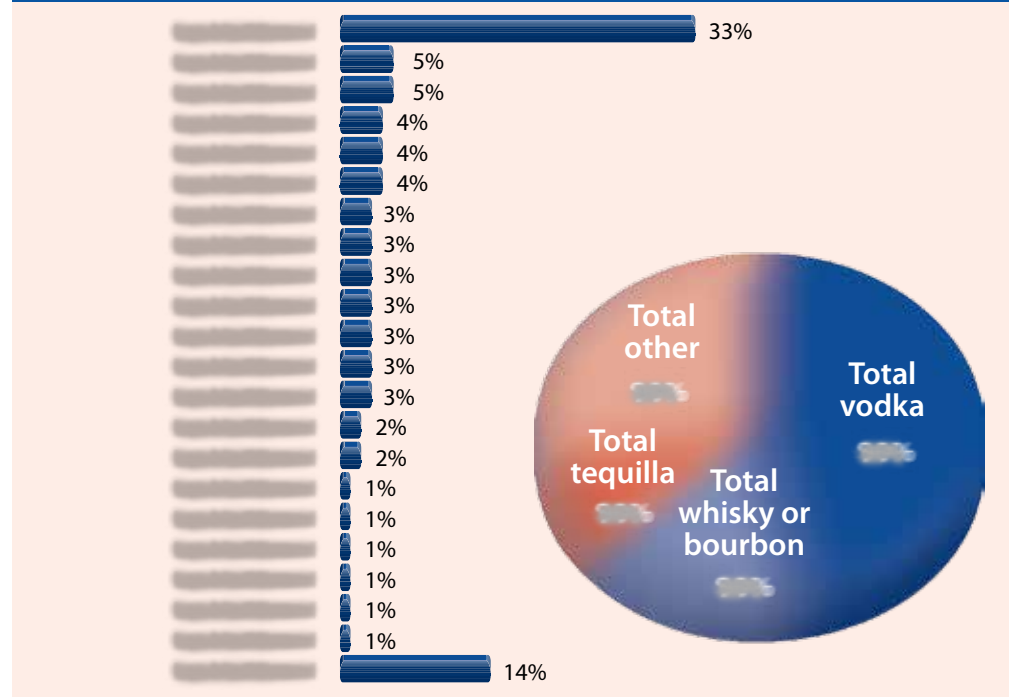


Beverage Brand Preferences

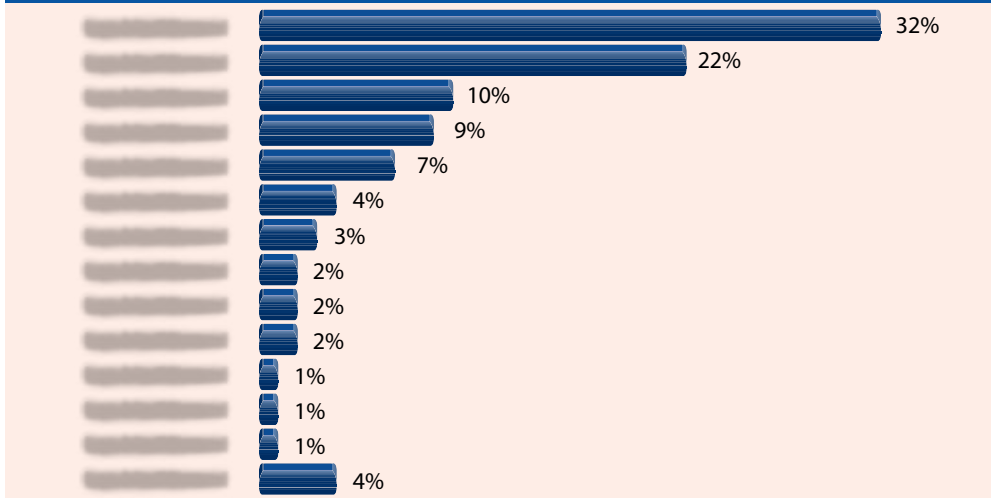
Beer brand drink most often (among beer drinkers)



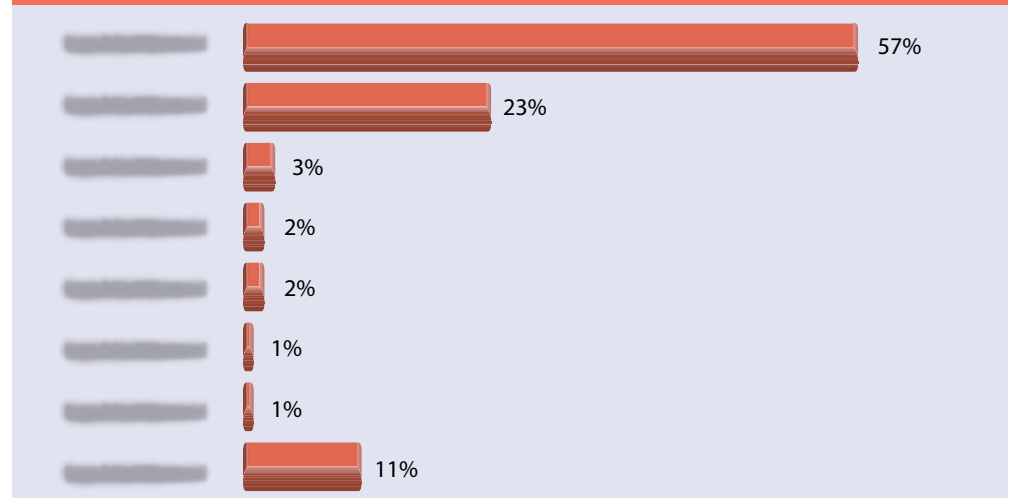
Preferred liquor or spirits brand (among liquor drinkers)



Soda brand drink most often (among soda drinkers)

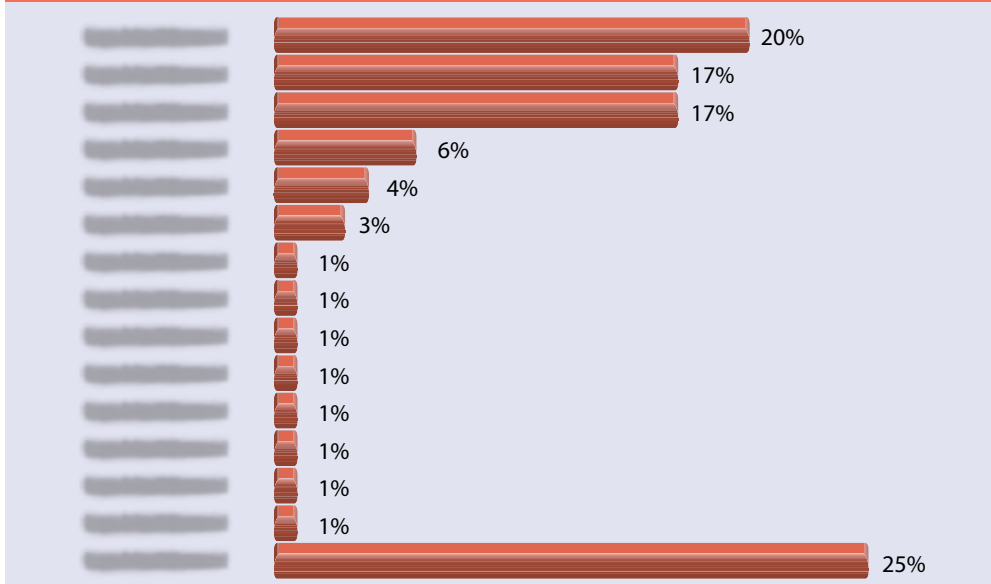


Preferred energy drink brand (among energy drink consumers)

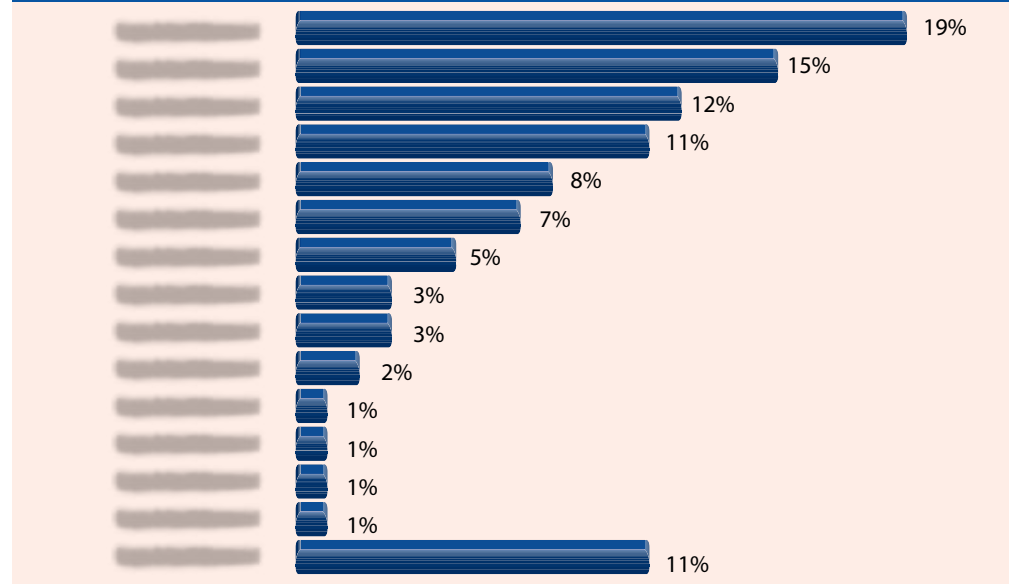


Other Brand Preferences

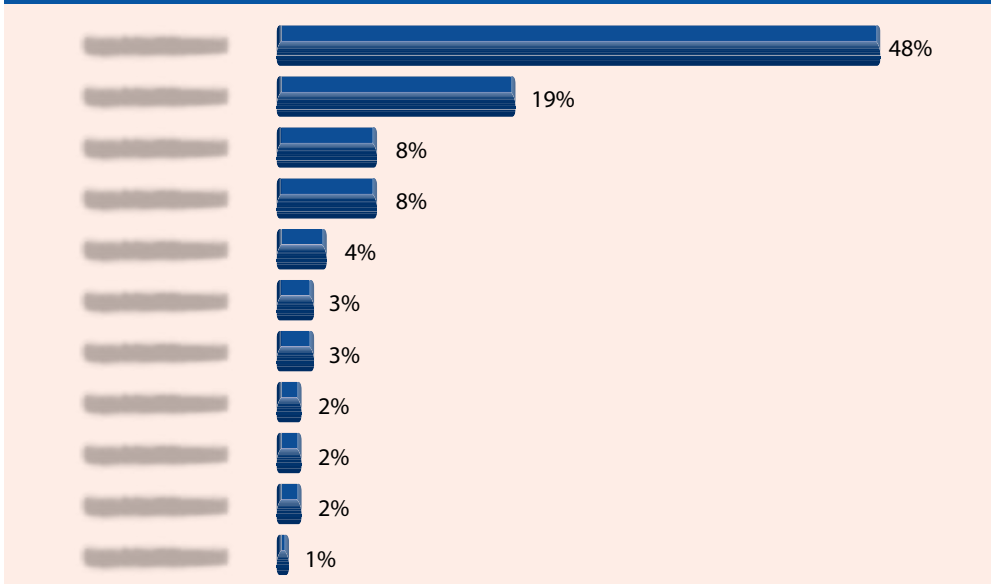
Bank use most often



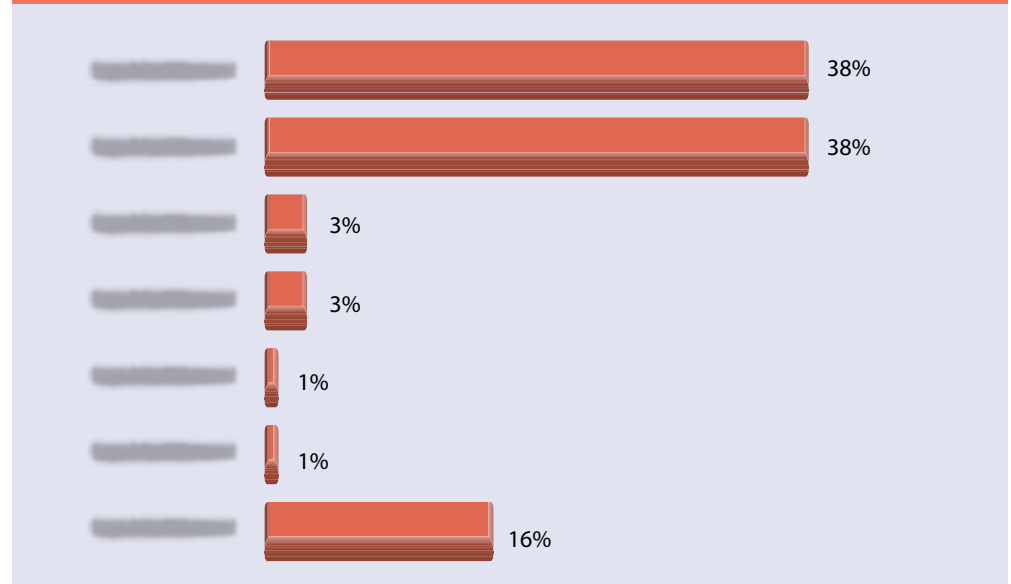
Auto insurance company



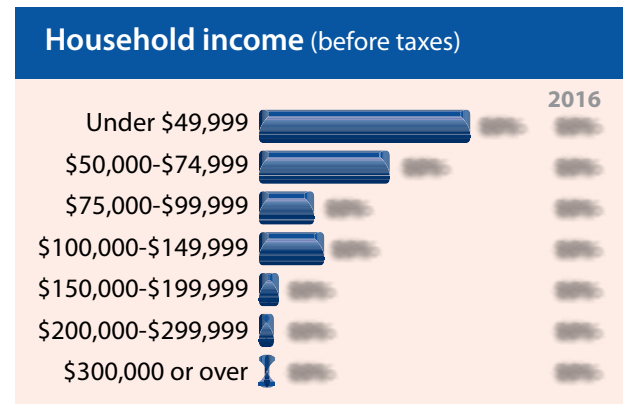
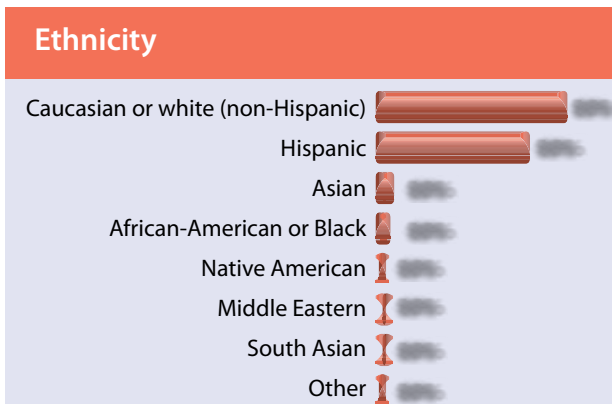
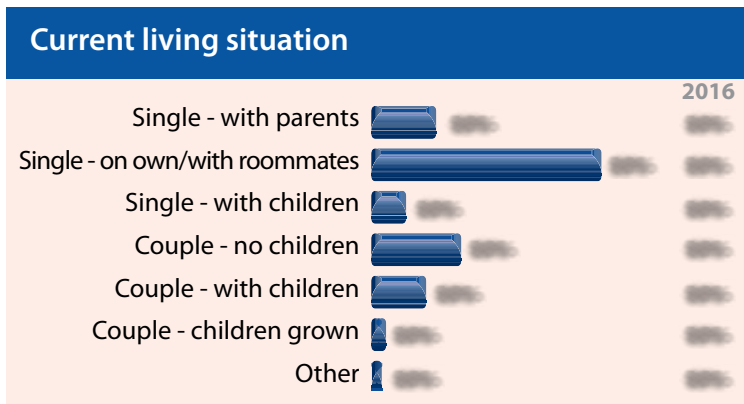
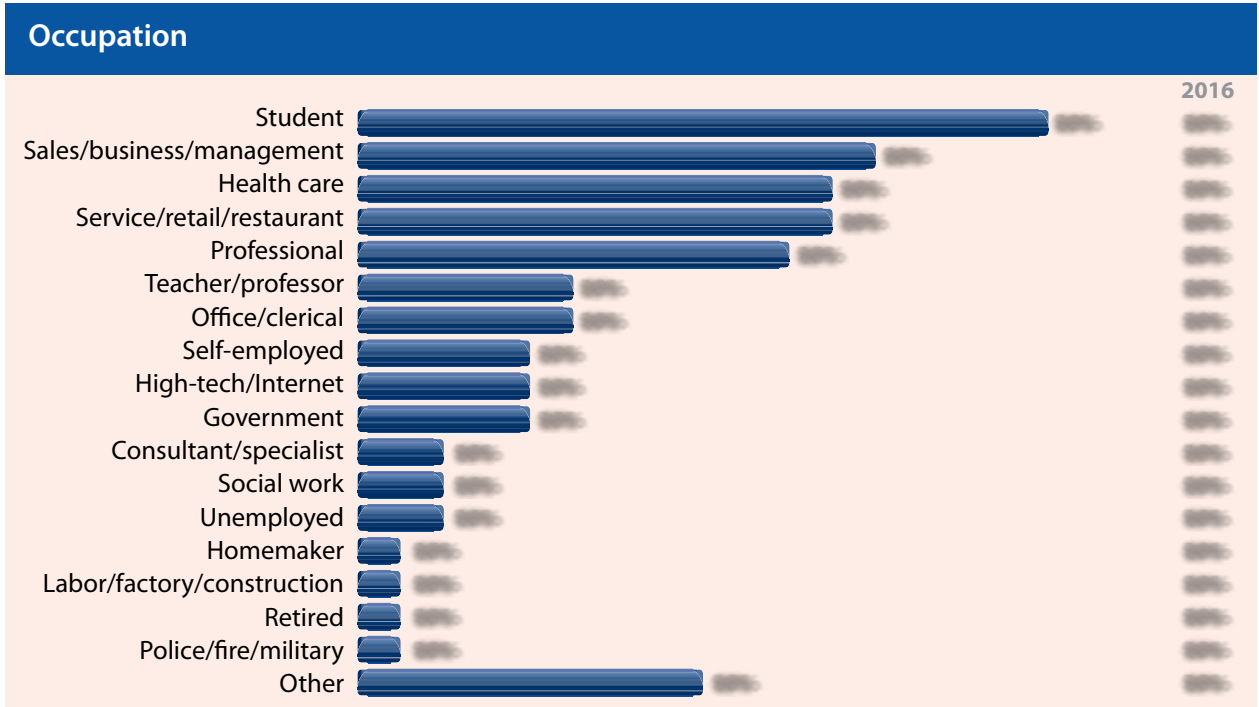
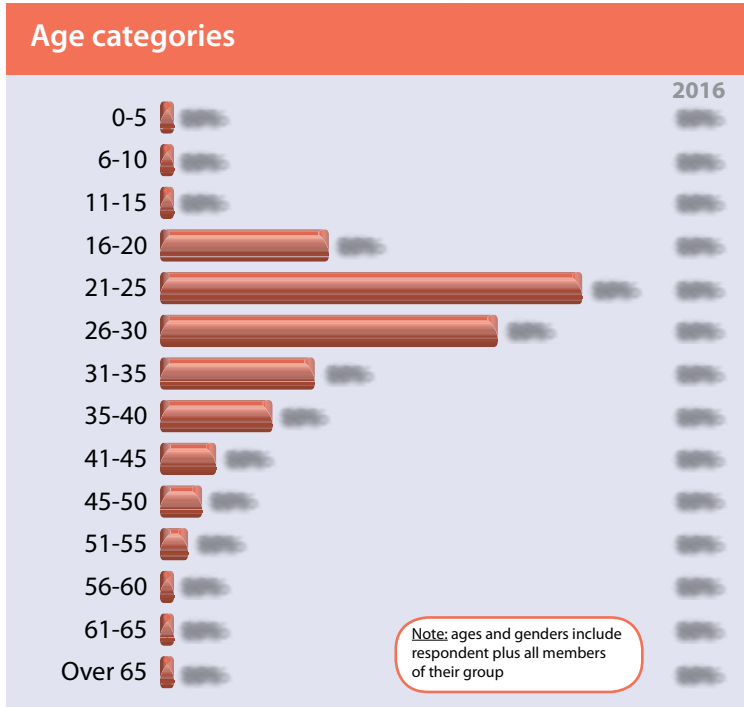
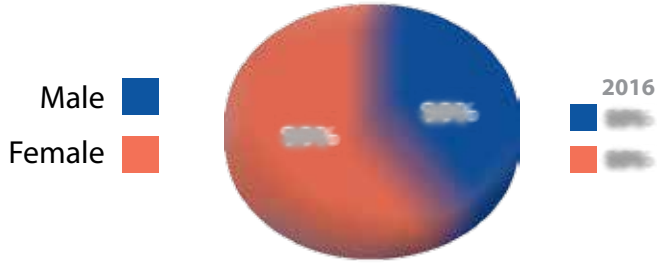
Preferred US airline (among those flying within 30 days)



Preferred cigarette brand (among smokers)



Demographics of Attendees

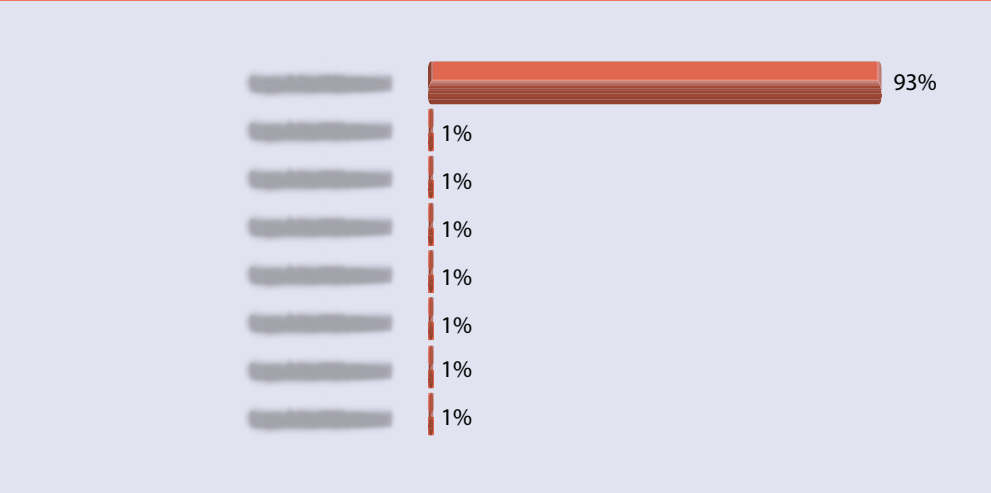


Estimated attendance

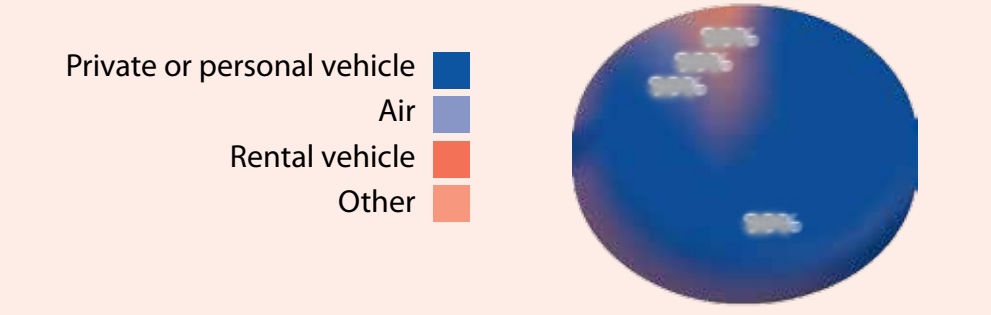
	2017	2016
Total person-visits (from published attendance)	[Bar]	[Bar]
Average visits per person	[Bar]	[Bar]
Estimated unique attendees	[Bar]	[Bar]
Total locals (Greater Austin)	[Bar]	[Bar]
Total non-locals (Outside Greater Austin)	[Bar]	[Bar]
Estimated unique attendees	[Bar]	[Bar]

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

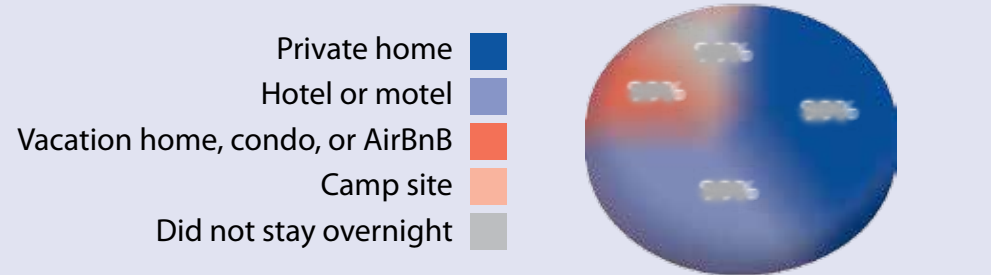
Place of residence (among non-locals)



Transportation to region (among non-locals)



Accommodations in region (among non-locals)



Economic Impact of Attendees



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

Comments from Attendees

"ACL has been my family reunion for 11 years. I can't imagine a sibling reunion without the music, beer, laughing, and life-loving experience."

"ACL needs an ice vendor because water at hydration stations is warm!"

"Add Dr Pepper to the bars."

"Amex Experience Lounge was the single best amenity at ACL and greatly added to my experience!"

"Can you have more brands that are willing to give freebies to attendees just like at Lollapalooza?"

"Could not find any vodka vendors and two types of wine were sold out by mid-afternoon on Day 2."

"Great experience for myself and my teenagers enjoying a music experience."

"Have fire trucks at the main stages to spray people and in return they can set up a booth for donations."

"I love Austin City Limits with all my heart. 2017 was my fourth year in a row."

"I wish they had more places to take pictures. For example, the big ACL frame."

"It would be awesome if there was some sort of liquor sold. Since Tito's is already there they should just limit how many drinks a person can have with a wristband hole punch."

"Let us bring umbrellas again! There is not enough shade and it was hot this year. 20+ mins waiting for water is crazy!"

"More gluten-free drinking options! Multiple cider choices should be provided."

"On the ACL website, please add where you can click the artist name and it takes you to their video on YouTube. Other music festivals do this."

"Please bring back the Quiet Events Silent Disco. It was our favorite part of ACL. We went every night."

"Stay weird!"

"Thank you for flushing toilets. I was able to have more drinks without being worried to go to a dirty porta potty."

"The beer garden with good beer is only on one end of the festival. It would be nice to have one near each main stage."

"The cashless wristband form of paying was clever and helped a lot. It made payments go by quicker so customers did not have to wait as long."

"Took too long getting in and I missed a show I really wanted to see. We waited in line over 1.5 hours in the heat with no water."



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.

