

# ENIGMA INDEPENDENT EVENT AUDITS

Unbiased Intelligence for Senior Marketers

## 2016 AUSTIN CITY LIMITS MUSIC FESTIVAL

Austin, Texas

September 30-October 2  
and October 7-9, 2016

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research



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# Highlights

## Most popular reasons for attending

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

## Most popular performers

- 1 Mumford & Sons
- 2 Radiohead
- 3 Cage the Elephant

## Most recalled sponsors

- 1 Samsung
- 2 Miller Lite
- 3 Honda

## Most visited brand activations

- 1 Waterloo Records Honda Artist Signing Shack
- 2 Samsung #GALAXYLIFE Concierge
- 3 Miller Lite Game Hall

## Most appreciated brand activations

- 1 Samsung #GALAXYLIFE Concierge
- 2 Waterloo Records Honda Artist Signing Shack
- 3 State Farm #HERETOHELP Lounge

## Top on-site beverages consumed

- 1 Free water from hydration stations
- 2 Beer
- 3 Bottled, boxed, or canned water

## Most popular vehicle types owned

- 1 Compact or sport-compact car
- 2 Mid-size car
- 3 Compact SUV

## Preferred brands

- Bank: Wells Fargo
- Wireless provider: AT&T
- Energy drink: Red Bull

## Tourism and economic impact

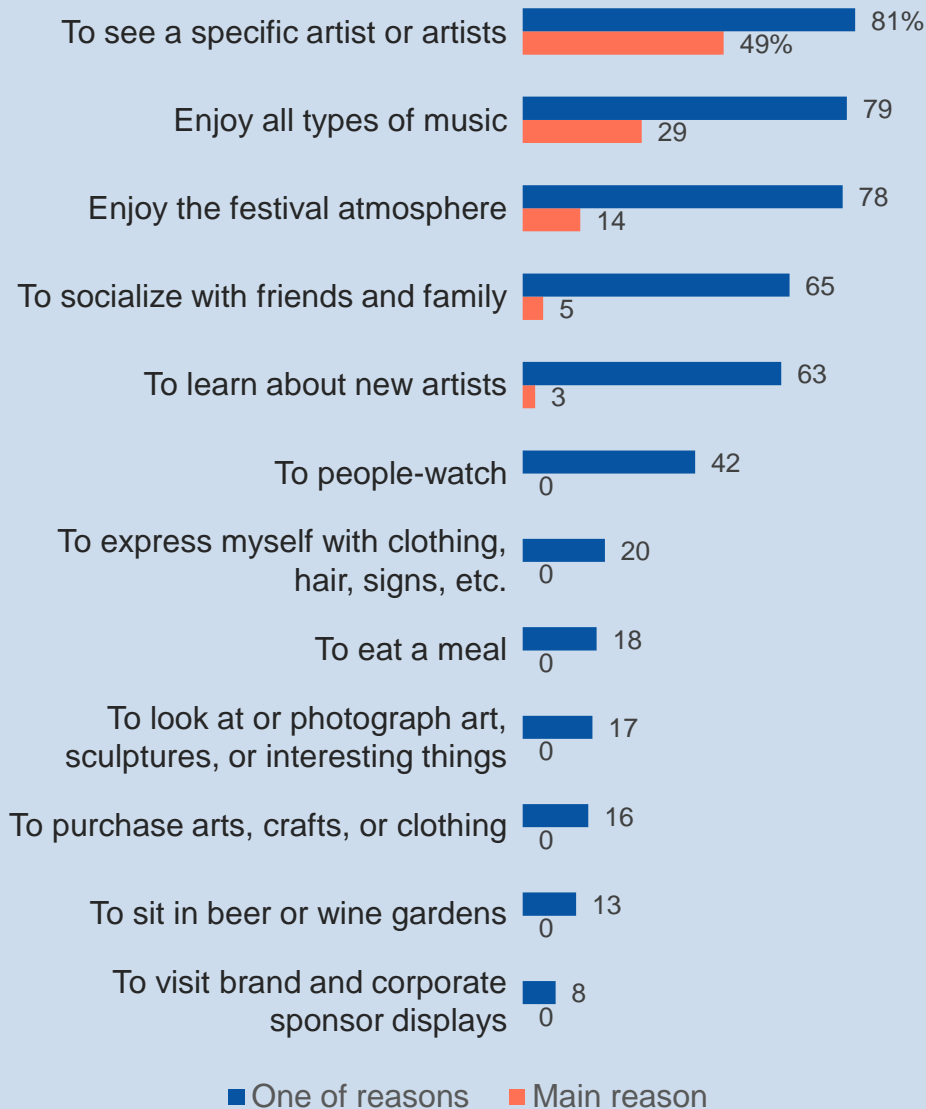
- Percentage non-local: 45%
- Estimated hotel room nights: 34,100
- Estimated economic impact: \$84.6M

## Best comments

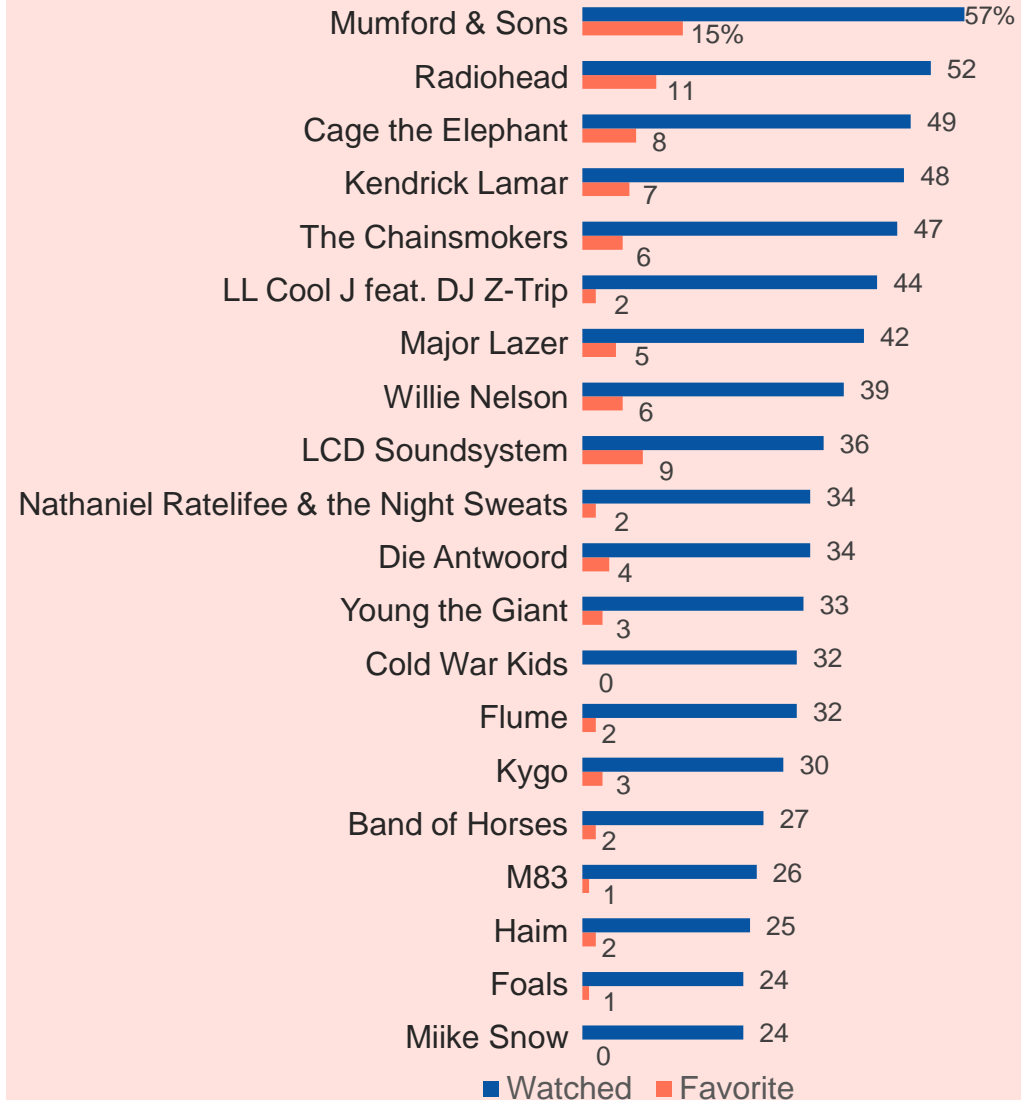
- "Best festival in the world."
- "I have been to every ACL fest and love it!!"
- "Loved Samsung Hospitality. They are the main reason we keep coming back."

# Event experience

## Reasons for attending event (aided)

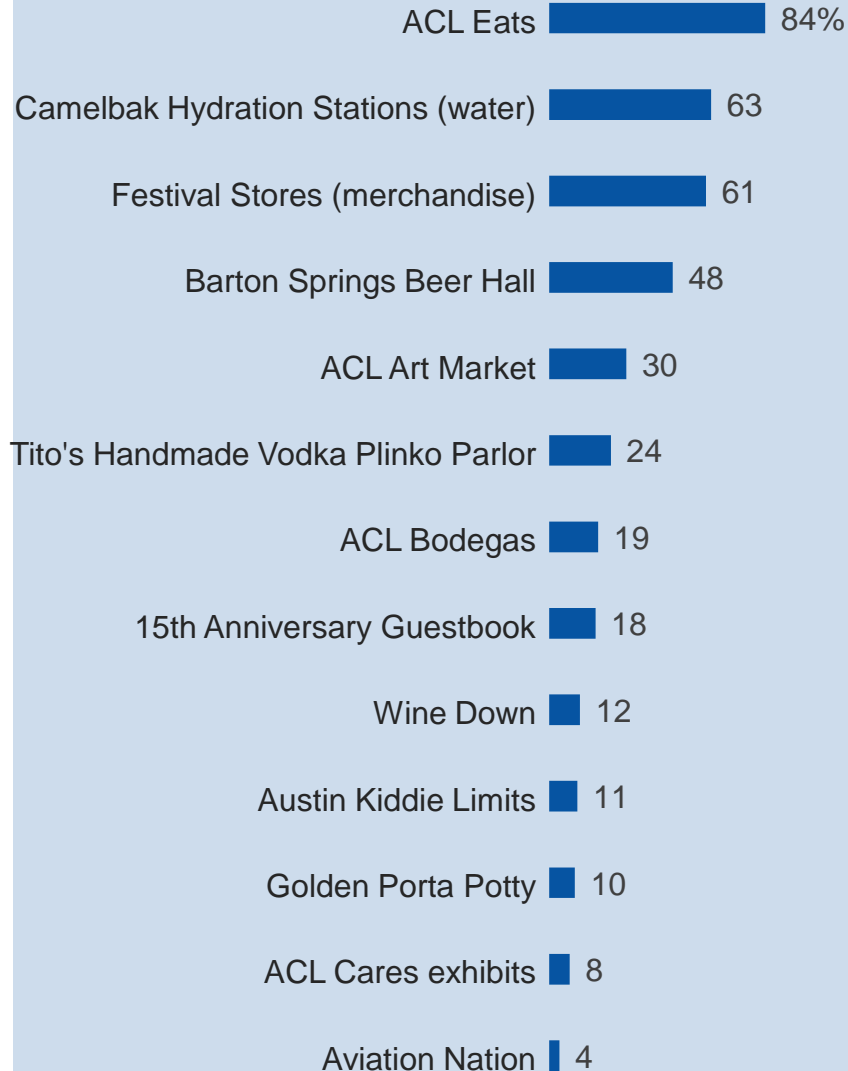


## Performances watched (top 20)



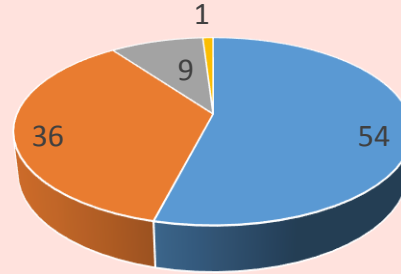
# Event experience

## Feature attractions visited

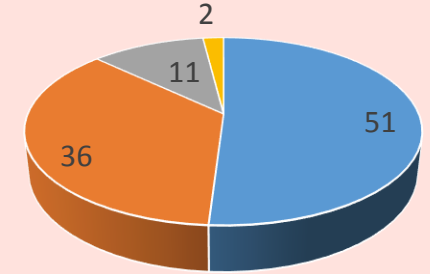


## Event ratings

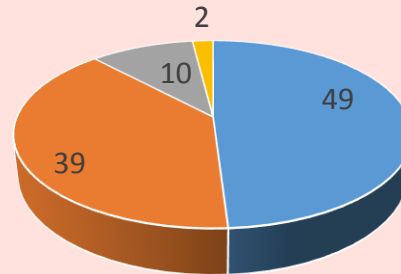
Quality of artists and bands



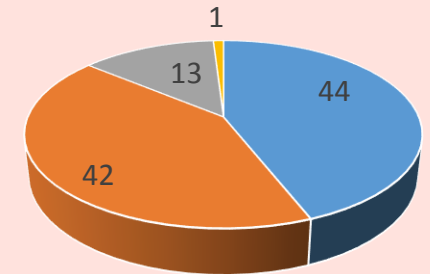
Variety of artists and bands



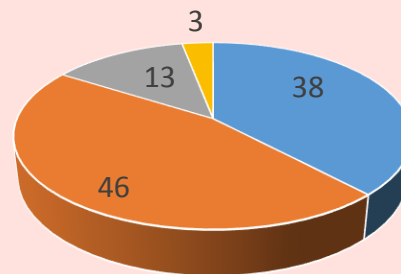
Variety of food and beverage



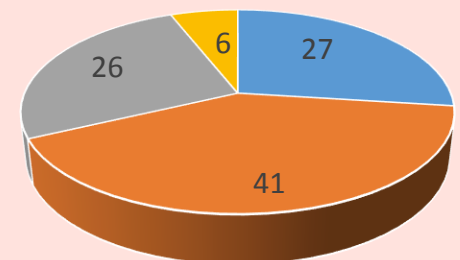
Quality of food and beverage



Cleanliness



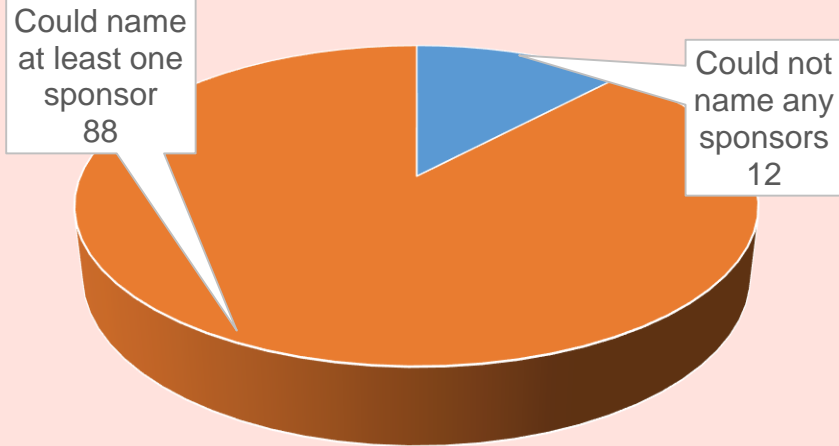
Value for admission price



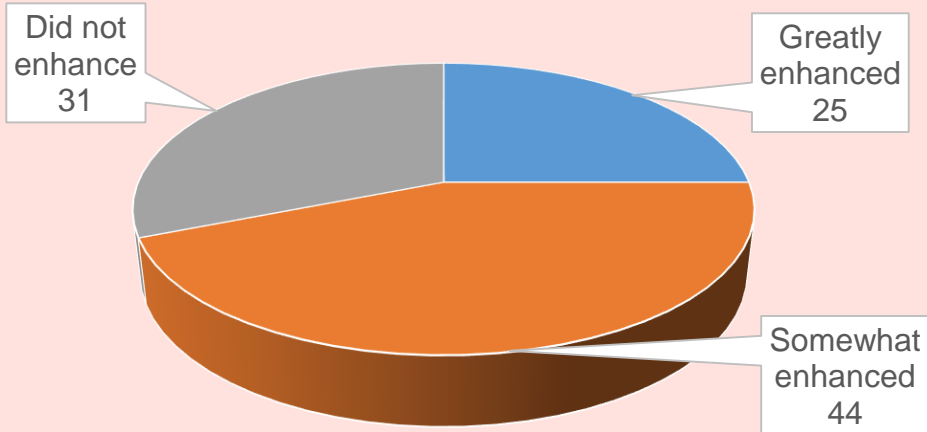
■ excellent ■ good ■ fair ■ poor

# Sponsor recall and appreciation

## Sponsor recall

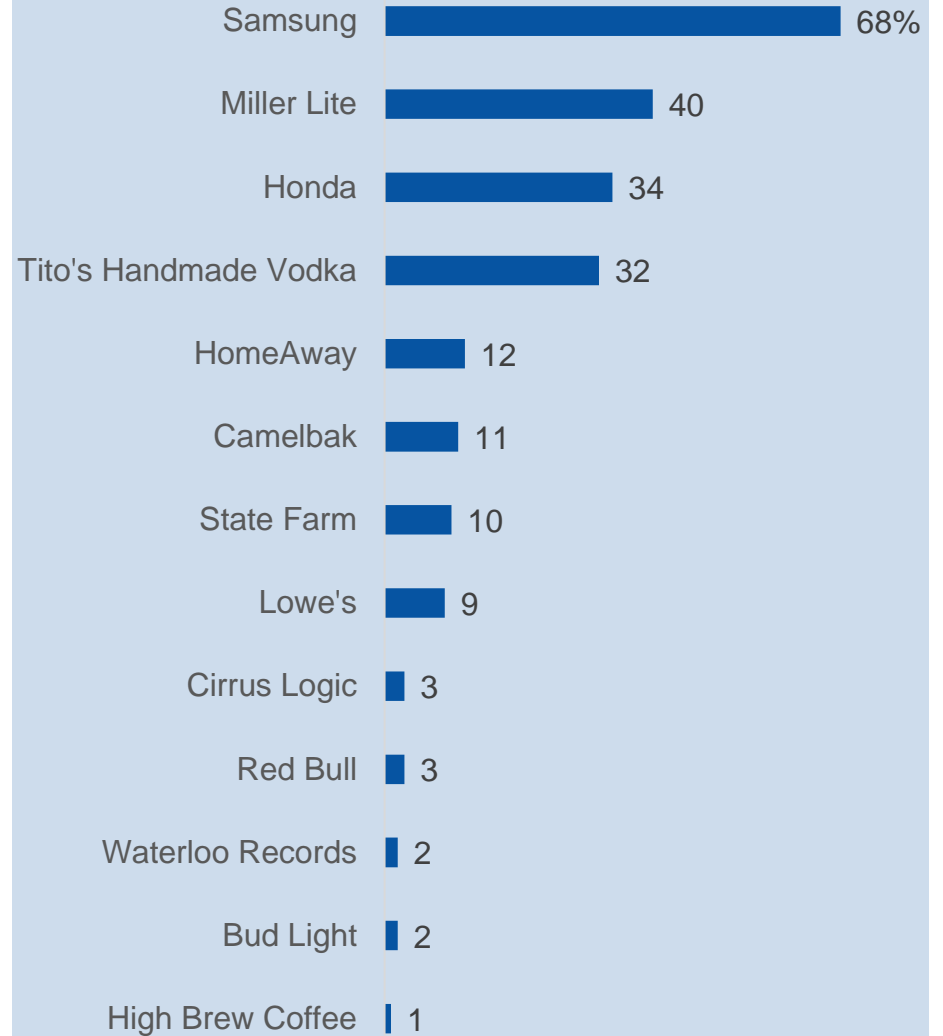


## Extent to which brands and sponsors enhanced experience



## Sponsor recall

(top 3 unaided among those who could recall sponsors)

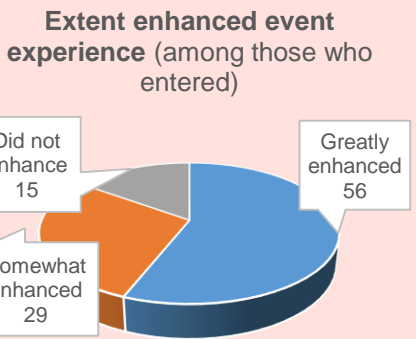
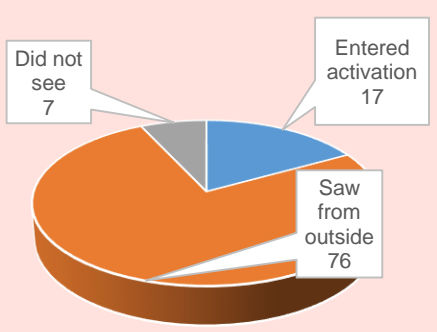


# Brand activation evaluations

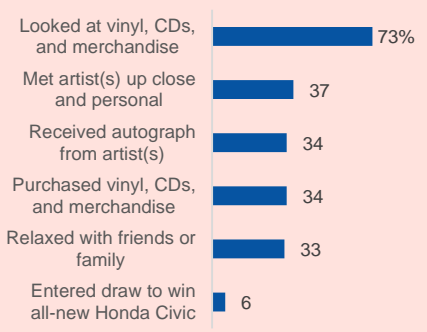
## Waterloo Records Honda Artist Signing Shack



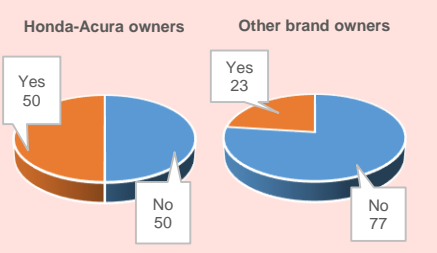
Rank Participation: 1 of 5  
Enhancement: 2 of 5



### Activities participated (among those who entered)



### More likely to purchase Honda vehicle than before festival (among those who entered)



# Brand activation evaluations

## Samsung #GALAXYLIFE Concierge



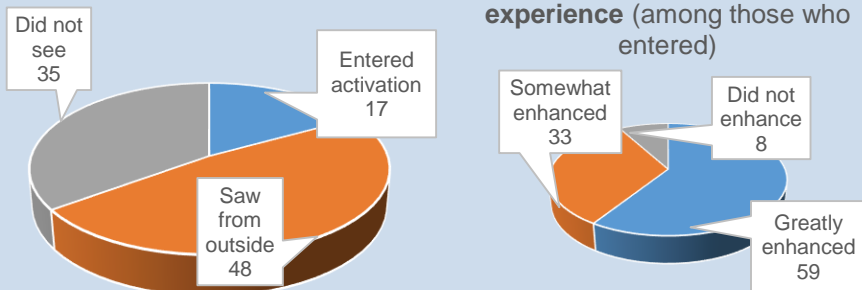
Rank Participation: 2 of 5  
Enhancement: 1 of 5

## Miller Lite Game Hall

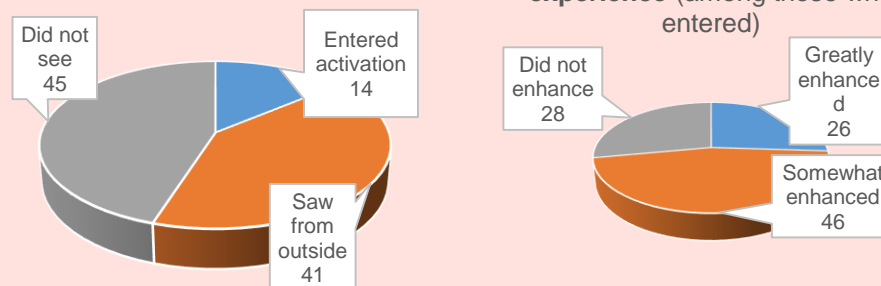


Rank Participation: 3 of 5  
Enhancement: 5 of 5

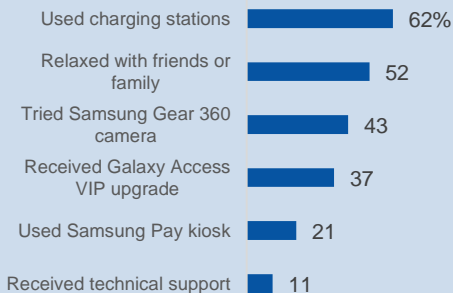
Extent enhanced event experience (among those who entered)



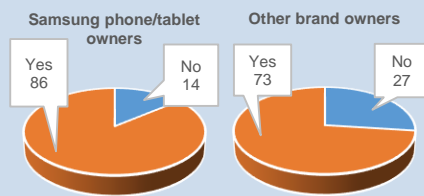
Extent enhanced event experience (among those who entered)



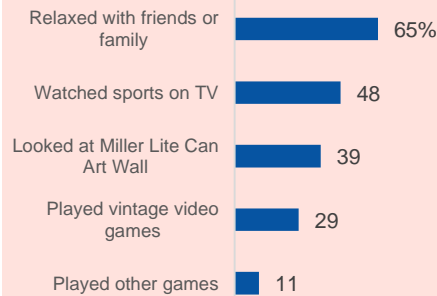
### Activities participated (among those who entered)



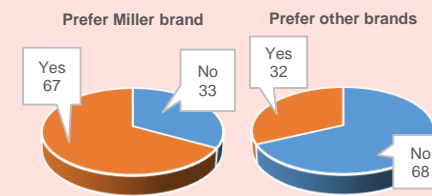
### More likely to purchase Samsung products than before festival (among those who entered)



### Activities participated (among those who entered)



### More likely to purchase Miller beer than before festival (among those who entered)

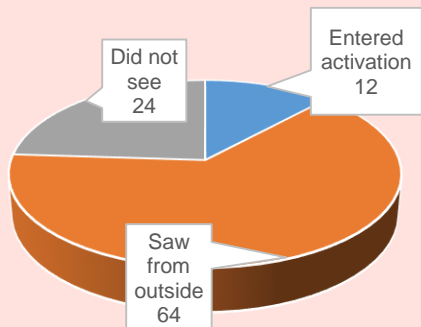


# Brand activation evaluations

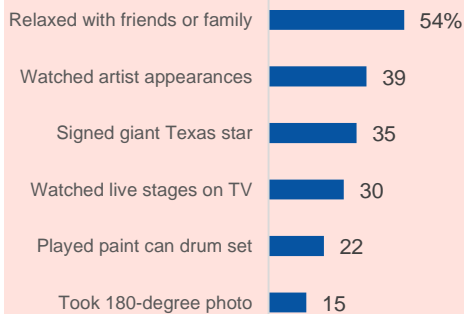
## Lowe's Studio



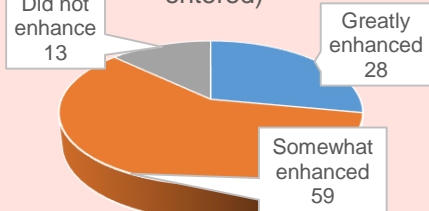
Rank Participation: 4 of 5  
Enhancement: 4 of 5



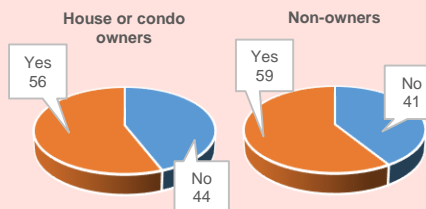
### Activities participated (among those who entered)



### Extent enhanced event experience (among those who entered)



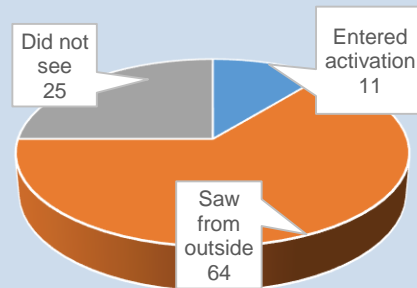
### More likely to purchase from Lowe's than before festival (among those who entered)



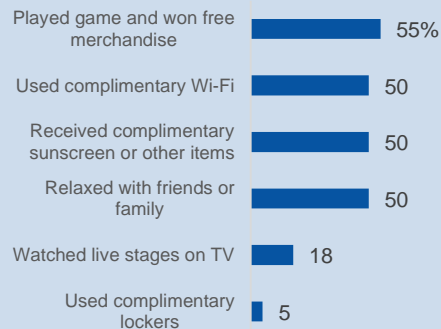
## State Farm #HERETOHELP Lounge



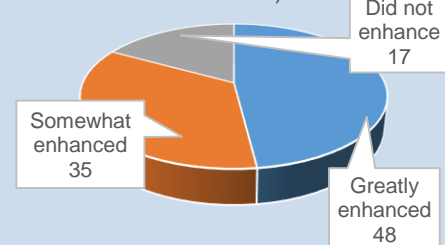
Rank Participation: 5 of 5  
Enhancement: 3 of 5



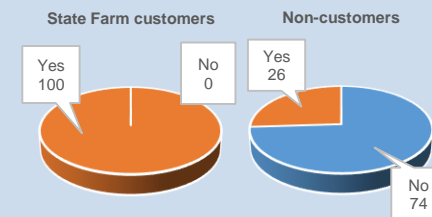
### Activities participated (among those who entered)



### Extent enhanced event experience (among those who entered)



### More likely to purchase from State Farm than before festival (among those who entered)





# On-site beverage consumption

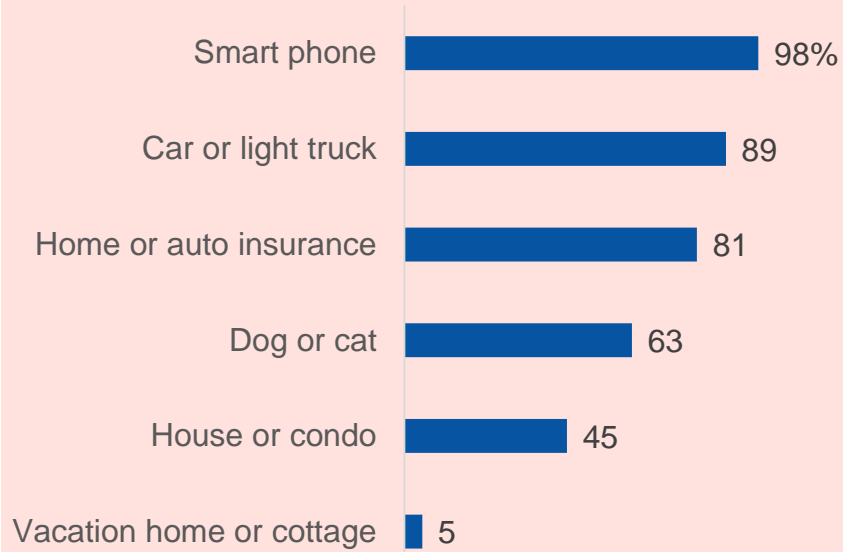
	Consumed on-site	Average consumed on-site (among consumers)
Free water from hydration stations	73%	4.1
Beer	70%	3.9
Bottled, boxed, or canned water	57%	3.7
Liquor or spirits	22%	3.2
Wine or wine coolers	21%	2.9
Soda or soft drinks	14%	2.5
Juice	11%	2.0
Energy drinks	9%	2.1
Coffee or coffee drinks	9%	2.0
Other beverages	13%	2.7

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

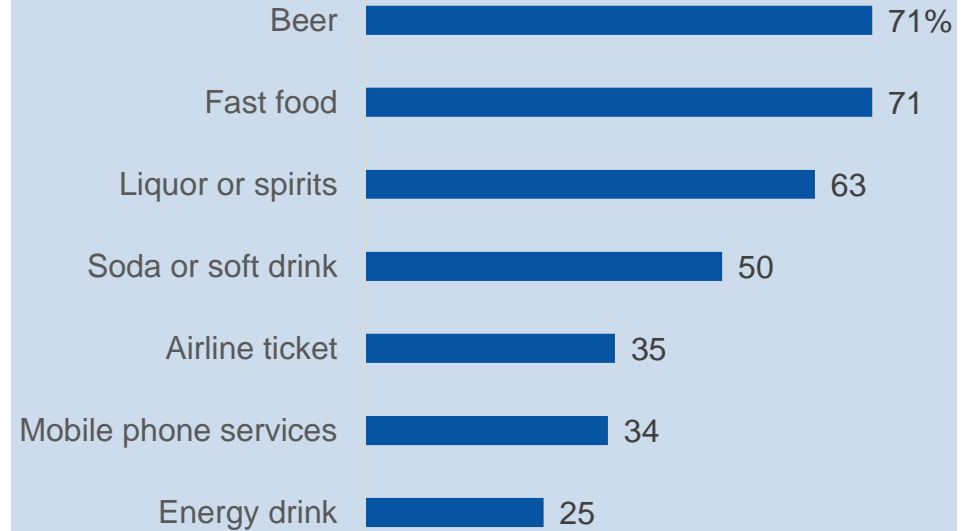


# Product ownership and use

## Product ownership

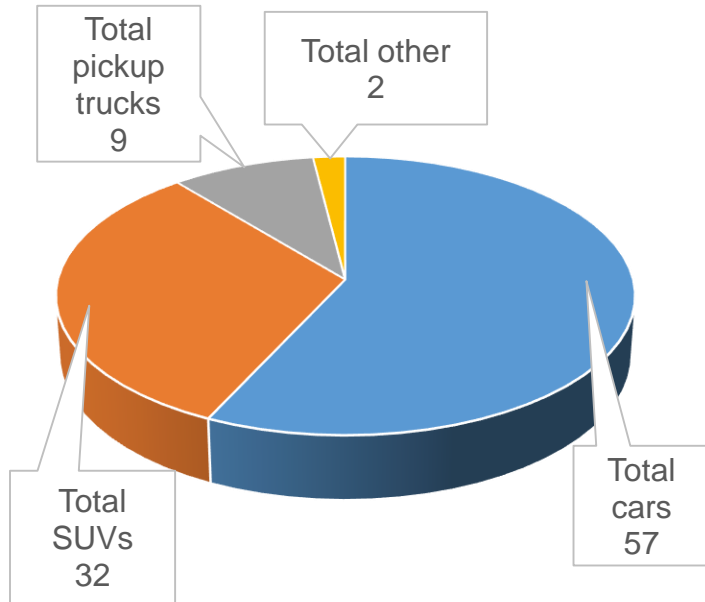
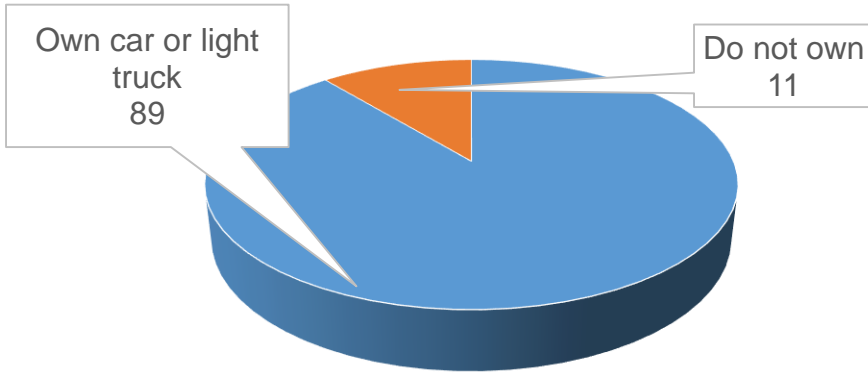


## Products purchasing within next 30 days

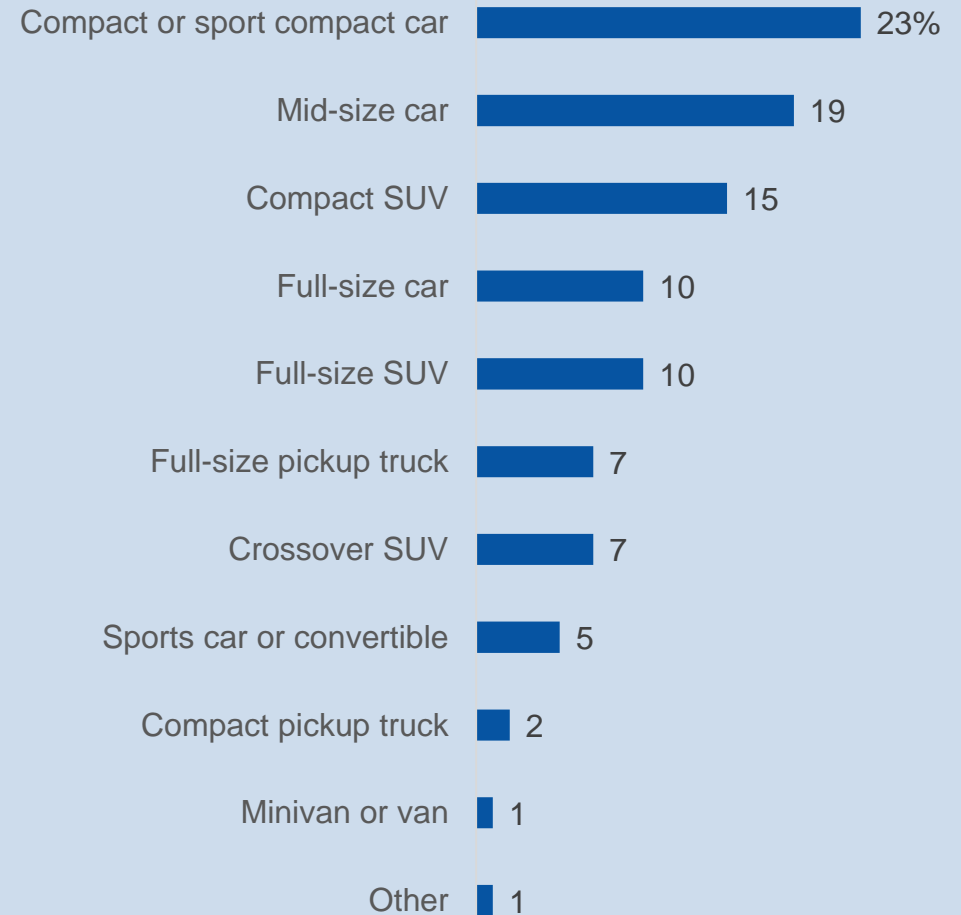


# Vehicle preferences

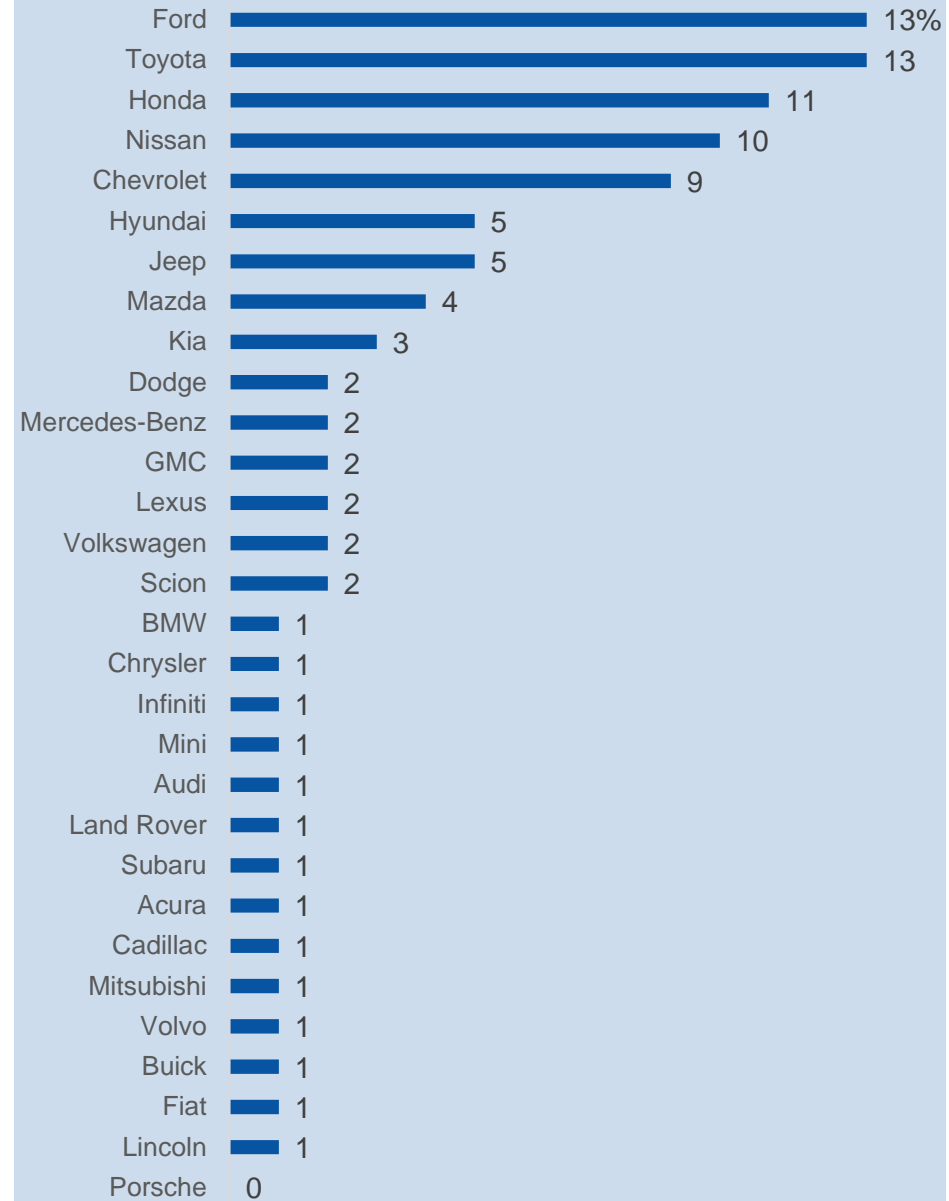
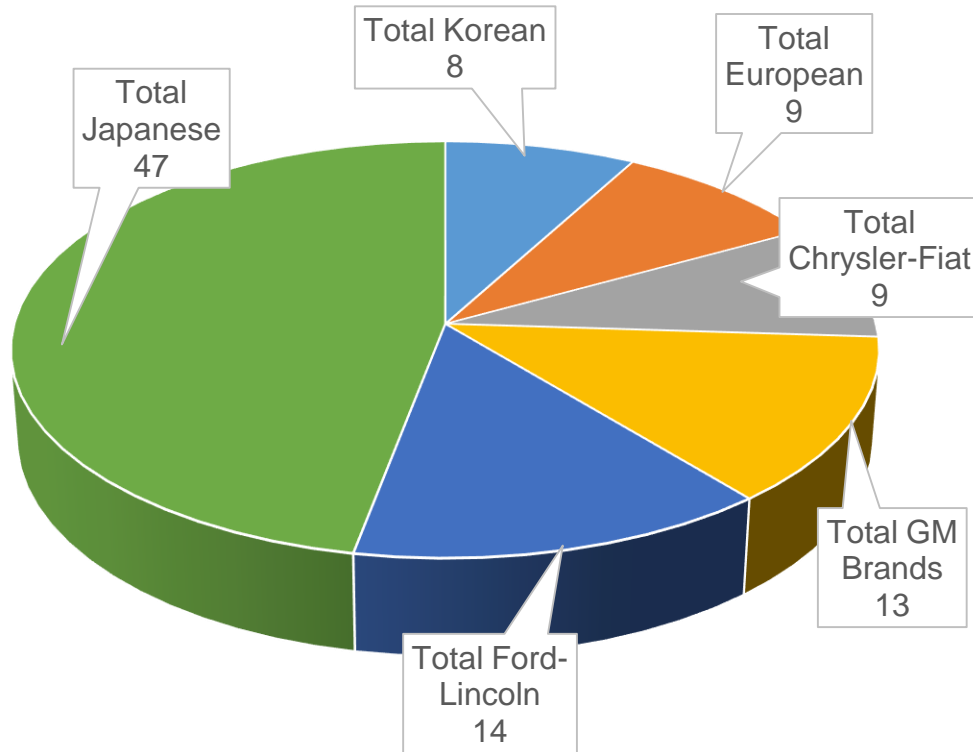
## Vehicle ownership



## Type of vehicle driven (among owners)

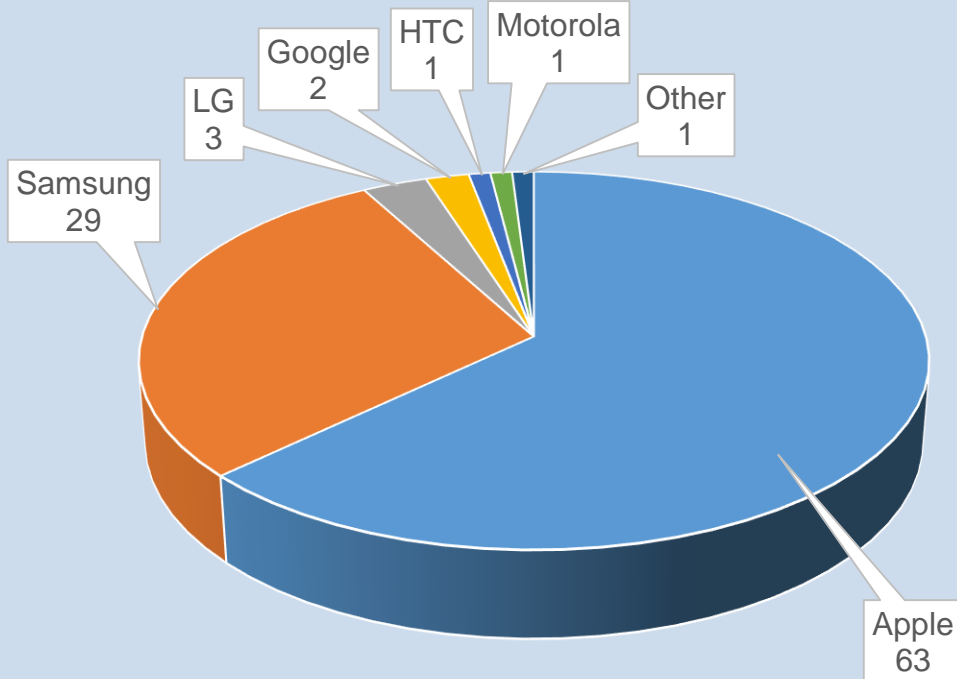


# Brand of vehicle driven (among owners)

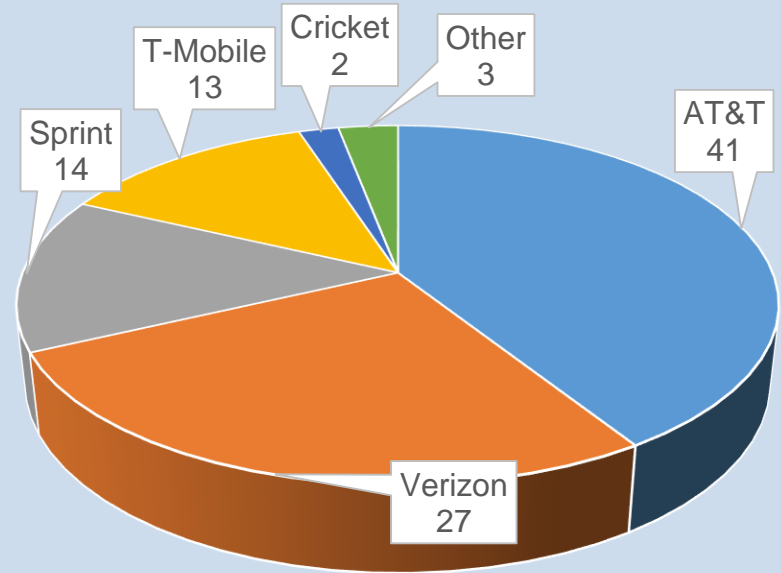


# Telecommunications brand preferences

Smart phone or tablet use most often

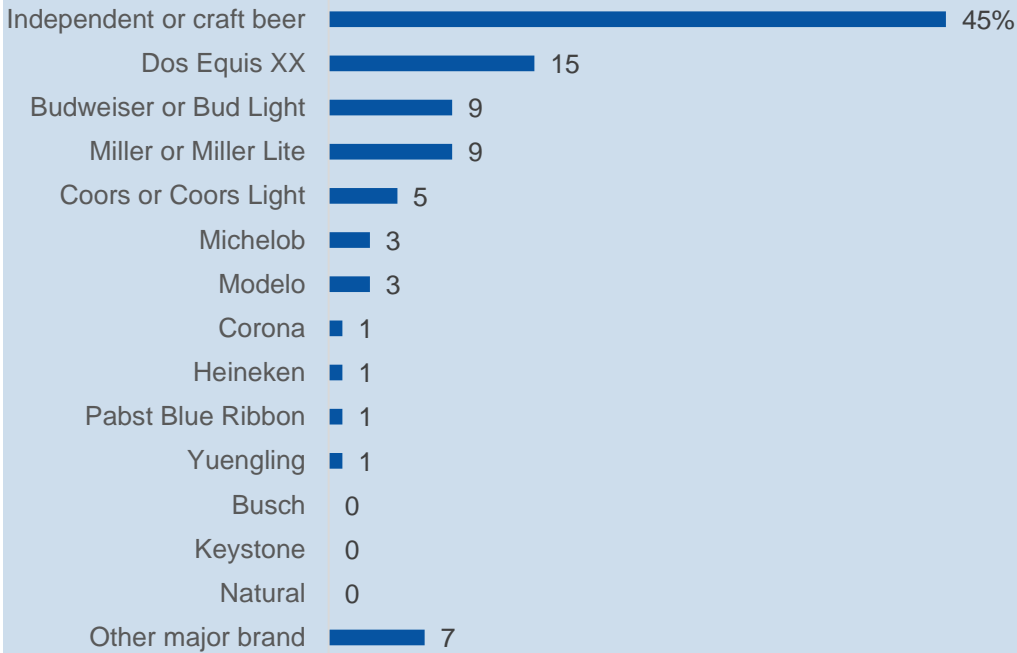


Wireless service provider



# Beverage brand preferences

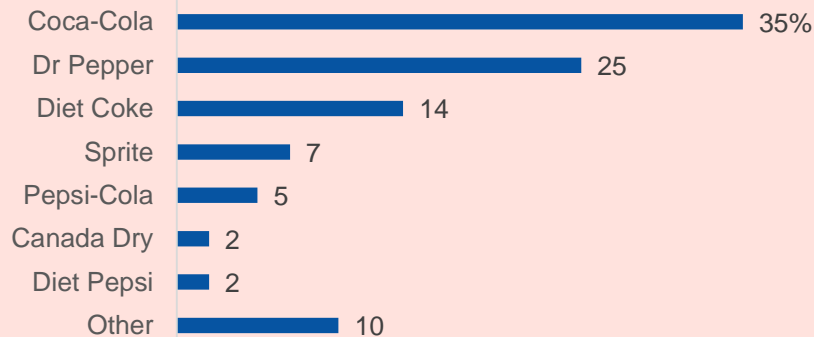
## Beer brand drink most often (among beer drinkers)



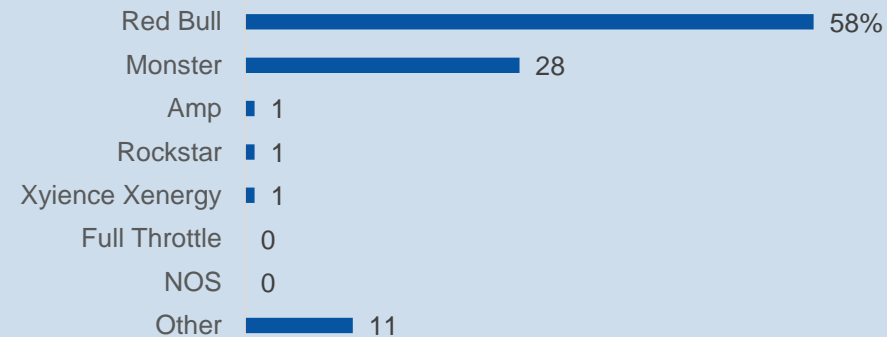
## Preferred liquor or spirits brand (among liquor drinkers)



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

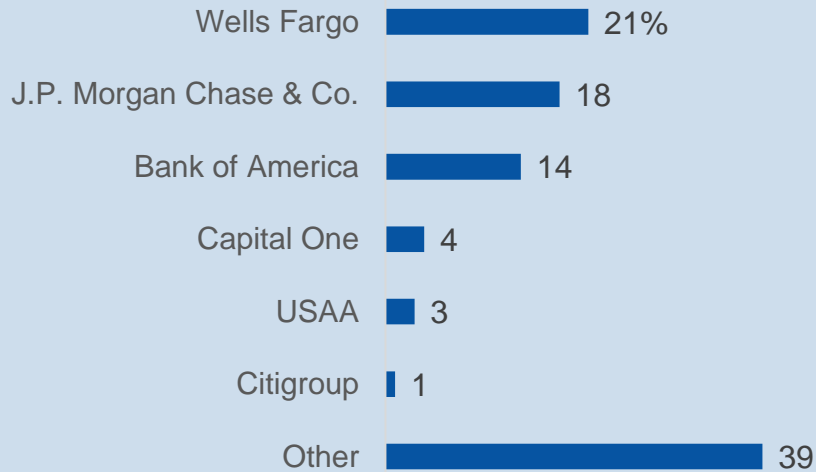


## Preferred energy drink brand (among energy drink consumers)

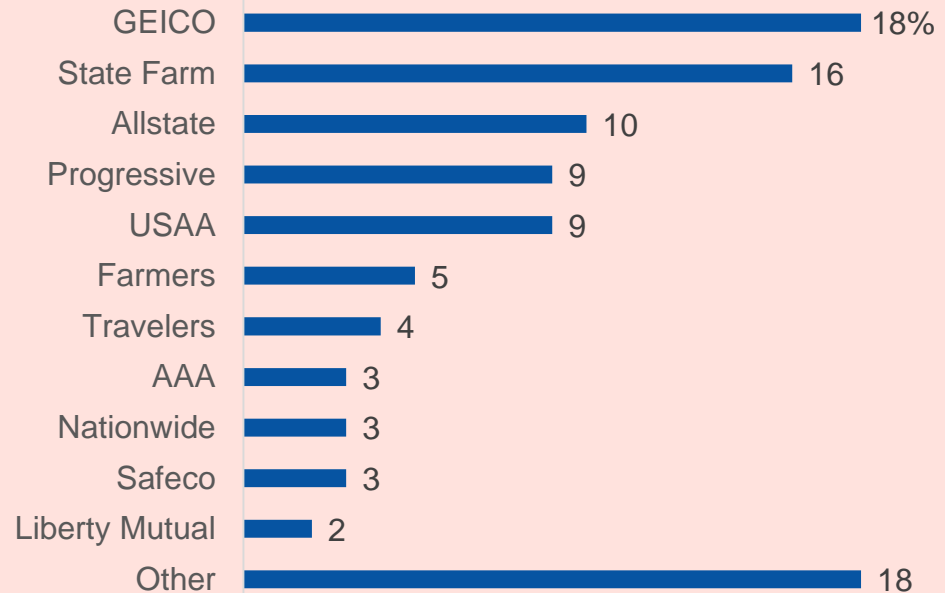


# Bank, Insurance, and Airline brand preferences

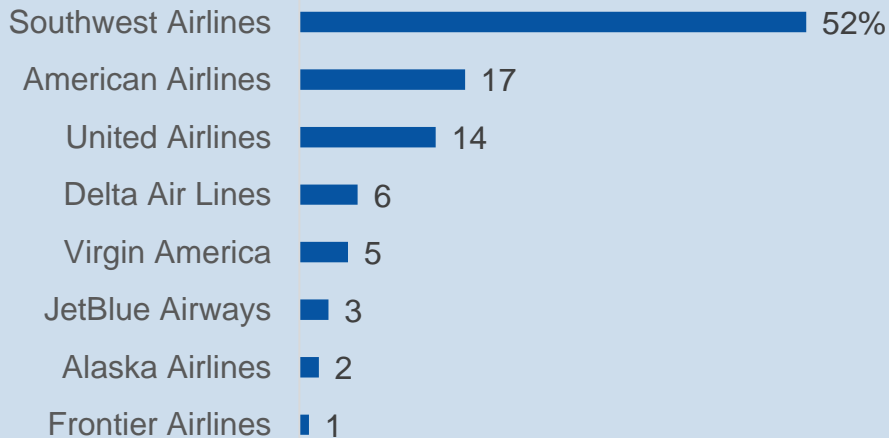
## Bank use most often



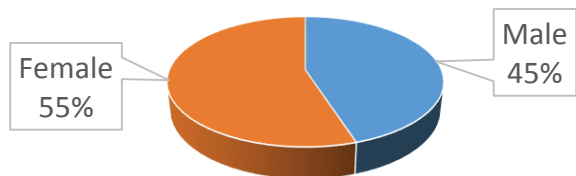
## Auto insurance company



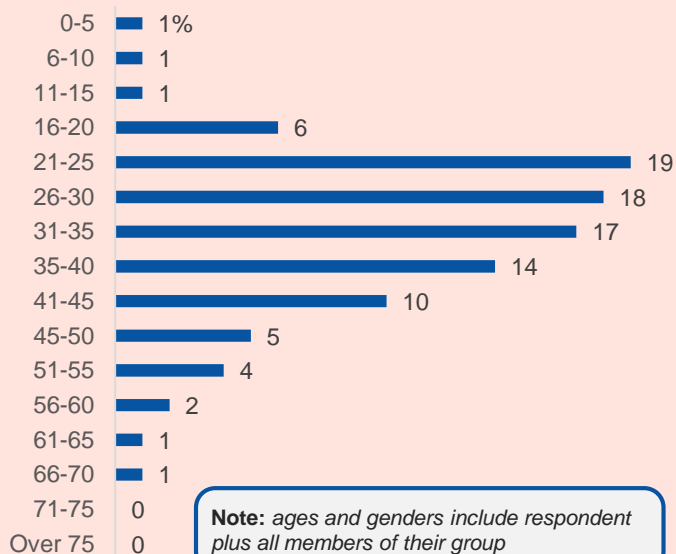
## Preferred US airline (among those flying within 30 days)



# Demographics of attendees



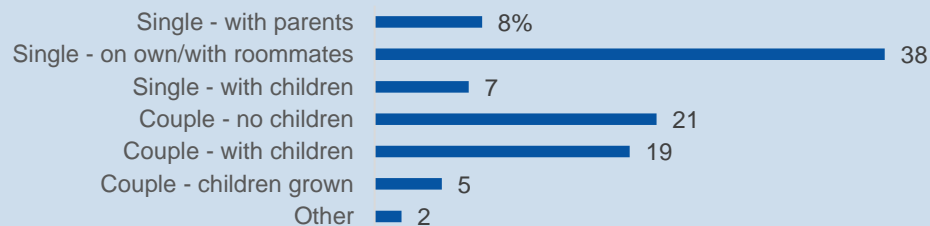
## Age categories



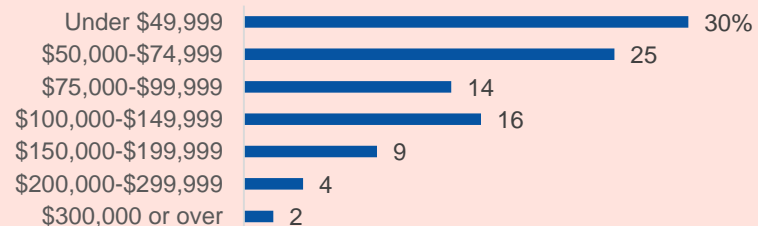
## Occupation



## Current living situation



## Household income (before taxes)





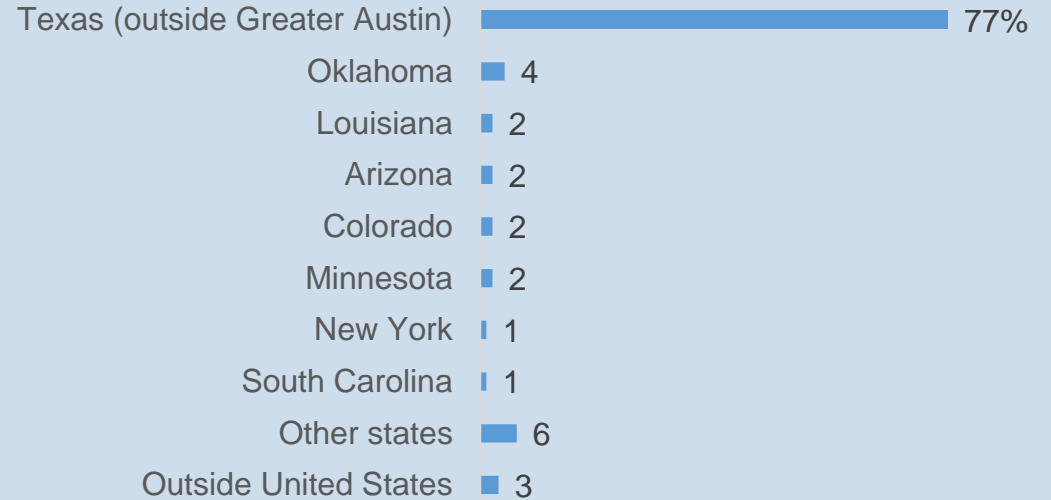
# Tourism and economic impact

## Estimated attendance

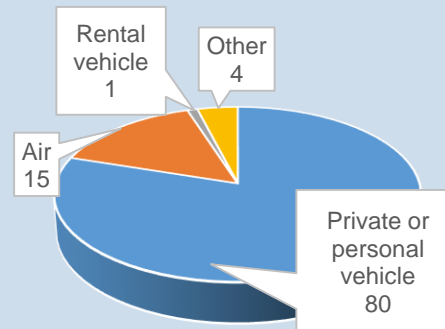
Total person-visits (from published attendance)	450,000
Average visits per person	2.8
<b>Estimated unique attendees</b>	<b>161,000</b>
Total locals (Greater Austin)	88,500 (55%)
Total non-locals (Outside Greater Austin)	72,500 (45%)
<b>Estimated unique attendees</b>	<b>161,000</b>

<b>Average nights stayed (all non-locals)</b>	<b>2.9 nights</b>
<b>Estimated hotel/motel room nights</b>	<b>34,100 room nights</b>

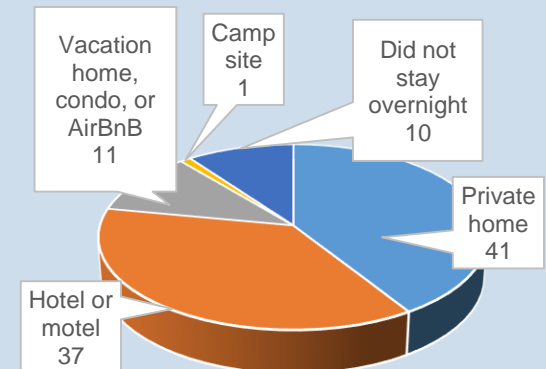
## Place of residence (among non-locals)



Transportation to Greater Austin (among non-locals)



Accommodations in Greater Austin (among non-locals)



# Economic impact



<b>Total spending by non-locals</b>	<b>\$50.2M</b>
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<b>Economic impact (Industry output)</b>	<b>\$84.6M</b>
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Direct and indirect	\$69.1M
Induced	\$15.5M

<b>Total employment supported (full-year job equivalents)</b>	<b>965</b>
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<b>Total taxes supported</b>	<b>\$11.5M</b>
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Federal	\$5.3M
State	\$3.0M
Local	\$3.2M

<b>Spending by non-locals</b>	
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Admission tickets and wristbands	\$12,800,000
Accommodations	\$12,500,000
Concessions at festival	\$5,100,000
Restaurants outside festival site	\$4,900,000
Shopping and retail	\$4,300,000
Groceries	\$2,900,000
Parking, fuel, and repairs	\$2,200,000
Other entertainment	\$2,100,000
Ride share services	\$1,000,000
Retail clothing	\$900,000
Car rentals	\$800,000
Public transit or taxis	\$700,000
<b>Total spending by non-locals</b>	<b>\$50,200,000</b>

<b>Spending by locals (not economic impact)</b>	
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Admission tickets and wristbands	\$17,800,000
Concessions at festival	\$7,200,000
Shopping and retail	\$2,600,000
Restaurants outside festival site	\$2,200,000
Parking and fuel	\$1,200,000
Ride share services	\$900,000
Retail clothing	\$300,000
Public transit or taxis	\$200,000
<b>Total spending by locals</b>	<b>\$32,400,000</b>

# Comments from respondents

ACL was the best weekend of my life. And for that I thank you!!!"

"Austin is my favorite city to visit for music festivals."

"Bathrooms were a huge upgrade this year. Kudos!!!"

"Best festival in the world."

"Flushing toilets were so amazing!!!!!"

"Great city, great festival!"

"I have been to every ACL fest and love it!!!"

"I love Austin and everything it is about!!!"

"Would like to say congratulations on an amazing festival. I travelled from Australia to attend ACL. I have been to many local festivals and never been to one so well organised as ACL. No waits for food or bathrooms. No fights or drunken idiots."

"Definitely great graphics and visuals on the screens! Definitely need to bring back Major Lazor for a second round; they blew it out of the water!"

"ACL is one of the greatest festivals in the U.S. The fact that they have the clean up initiative where attendants and workers have the option to clean up Zilker Park for prizes and rewards is a great concept."

"It was my first ACL with my 3 kids ages 6-9 and I must say thank you for the wonderful experience. The family zone was filled with great activities and everyone was beyond courteous towards my kids."

"It was a great time! We love you Austin!!!"

"Looking forward to 7th year in a row!!!!"

"We had a great time. People, food, and vibe were all awesome! Looking forward to next year."

"Loved Samsung Hospitality. They are the main reason we keep coming back."

"More stations for mixed drinks. And maybe not price the wine so high!"

"Thank you so much for making it possible for me to cross another thing off my bucket list (to see Radiohead)!"

"This is the 11th year I've attended ACL. I miss the days of the smaller, less crowded festival but I appreciate how well everything is done at ACL."

"This was my third ACL and I will be purchasing for next year also. ACL is one of the best and well-organized music festivals I've been to."



# 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 500 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.

