

ENIGMA INDEPENDENT EVENT AUDITS
Unbiased Intelligence for Senior Marketers



enigma
research

2016 CAPITAL ONE ORANGE BOWL
Miami, Florida

December 30, 2016



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Highlights

Most popular reasons for attending

- 1 To support one of the teams
- 2 Enjoy college football
- 3 Enjoy the Bowl Game atmosphere

Most popular tailgating foods

- 1 Snacks
- 2 Sandwiches
- 3 Chicken or wings

Most popular feature attractions

- 1 DNCE Halftime Show
- 2 Capital One Orange Bowl Fan Fest
- 3 Alumni VIP parties

Top beverages consumed on-site

- 1 Beer
- 2 Liquor
- 3 Bottled or boxed water

Most recalled sponsors

- 1 Capital One
- 2 Chick-fil-A
- 3 Hard Rock

Most popular brands used

- Bank: Bank of America
- Beer: Budweiser or Bud Light
- Auto insurance: GEICO

Brand activations with highest participation

- 1 Chick-fil-A card
- 2 Capital One Fan Fest
- 3 Dos Equis bars

Tourism and economic impact

- Percentage non-local: 40%
- Estimated hotel room nights: 8,700
- Estimated impact of non-locals: \$56.7M

Most appreciated brand activations

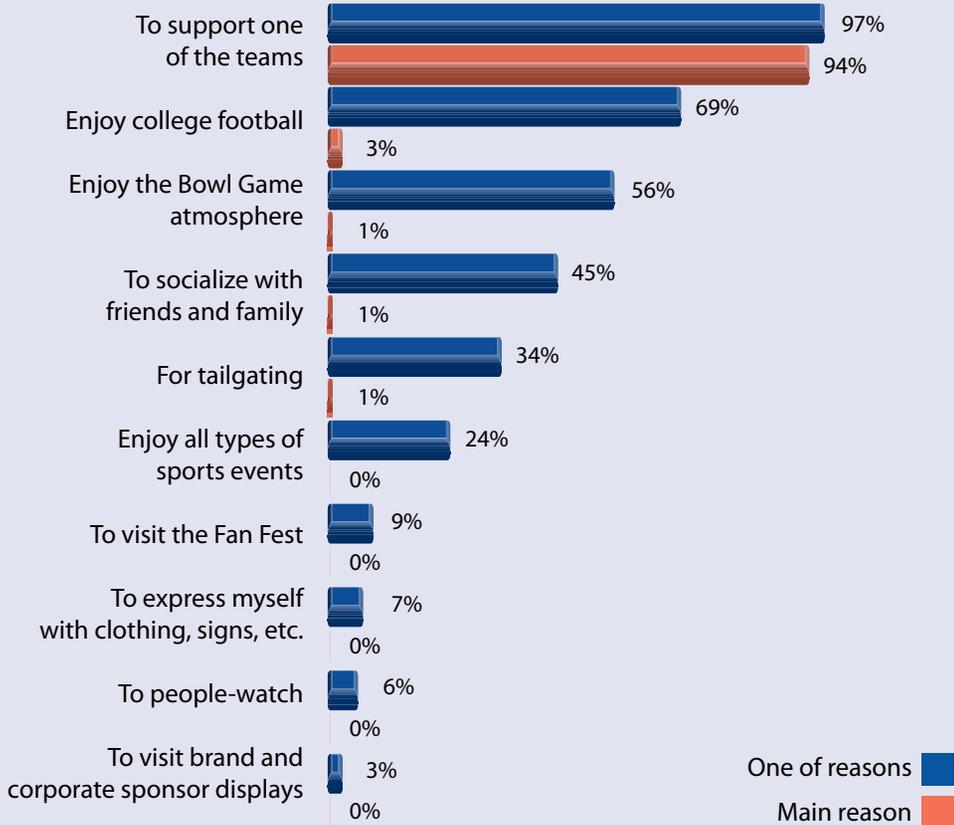
- 1 Capital One Fan Fest
- 2 Dos Equis bars
- 3 Ticket Galaxy tent

Best attendee comments

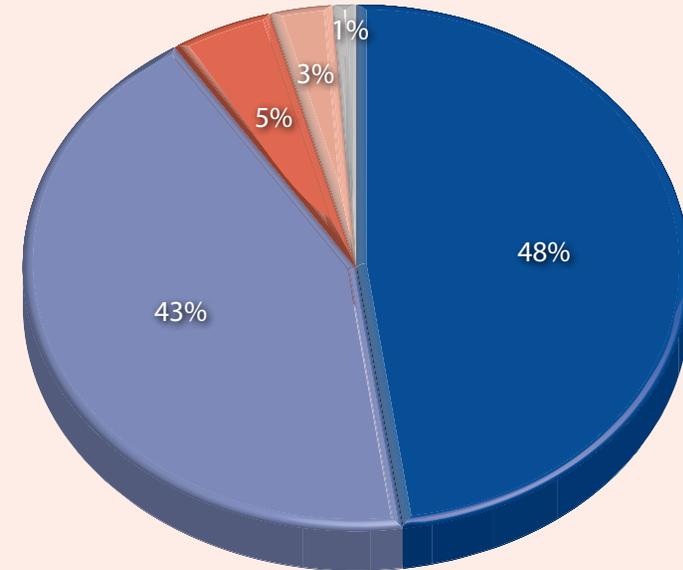
- "It was the best football game I've ever attended and all the little extras were awesome."
- "It was very nice that Capital One provided back packs and Chick-fil-A provided gift cards."
- "Miami is the best city on planet."

Event Experience

Reasons for attending the show (aided)



Likelihood to attend Bowl Game if team playing



Very likely to attend regardless of location

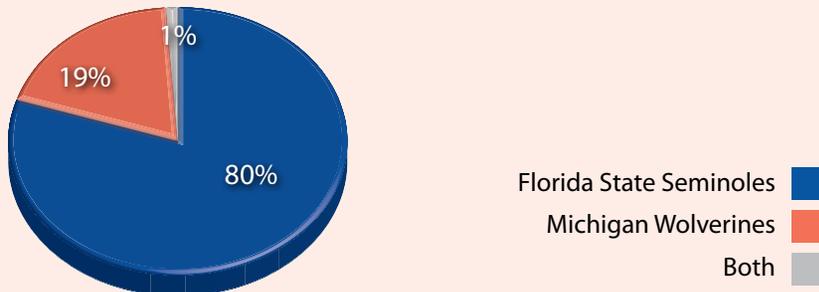
Very likely to attend if within a few hours drive

Very likely to attend only if in Miami

Somewhat likely to attend

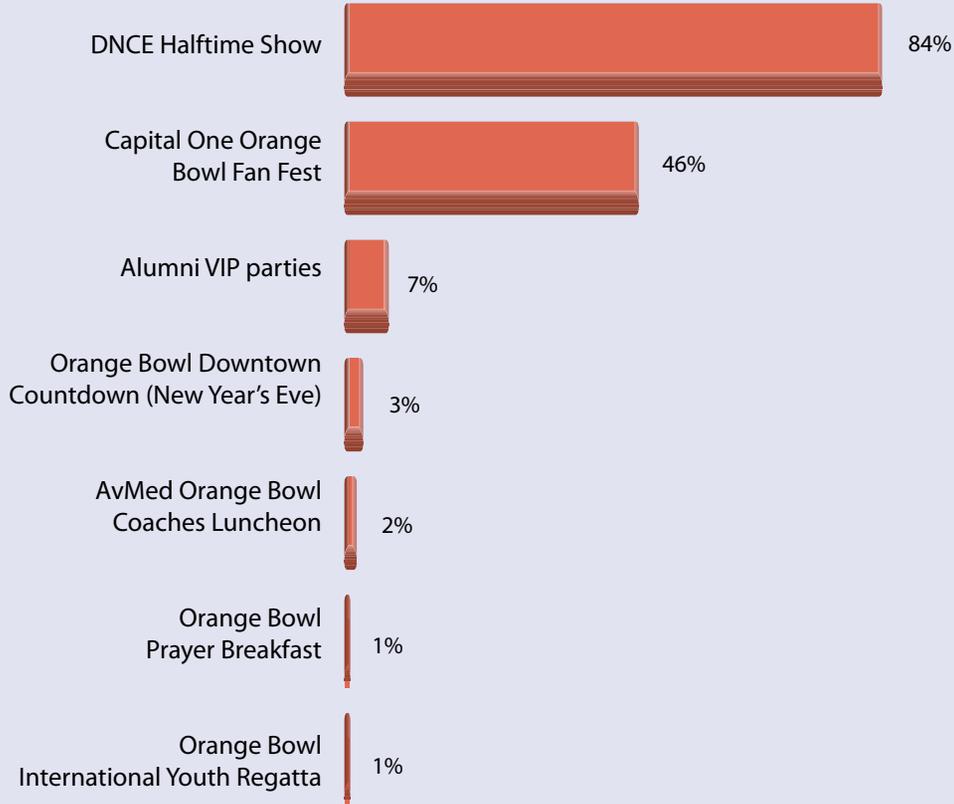
Unlikely to attend

Team supported at game



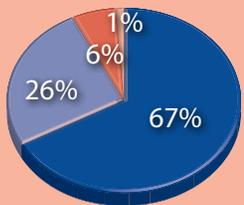
Event Experience

Feature attractions experienced

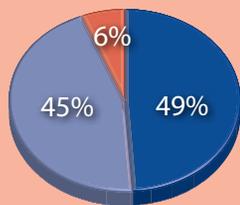


Event ratings

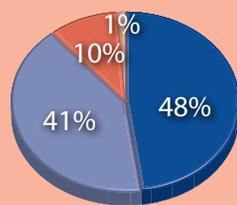
■ excellent
 ■ good
 ■ fair
 ■ poor



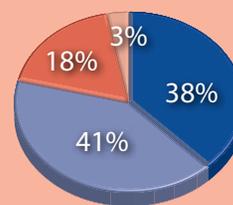
Quality of entertainment



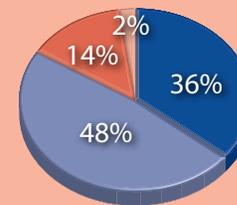
Cleanliness



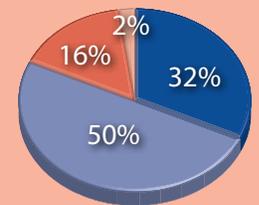
Variety of entertainment



Value for admission price



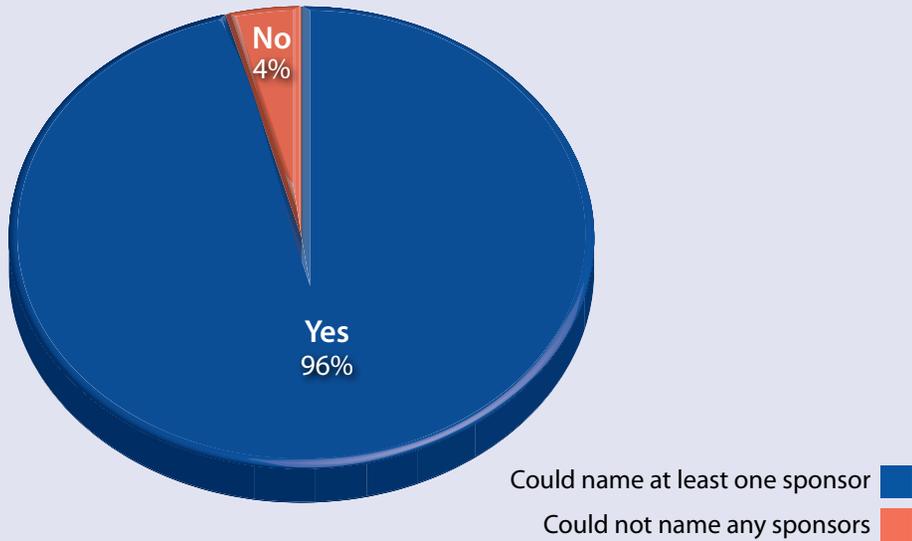
Variety of food and beverage



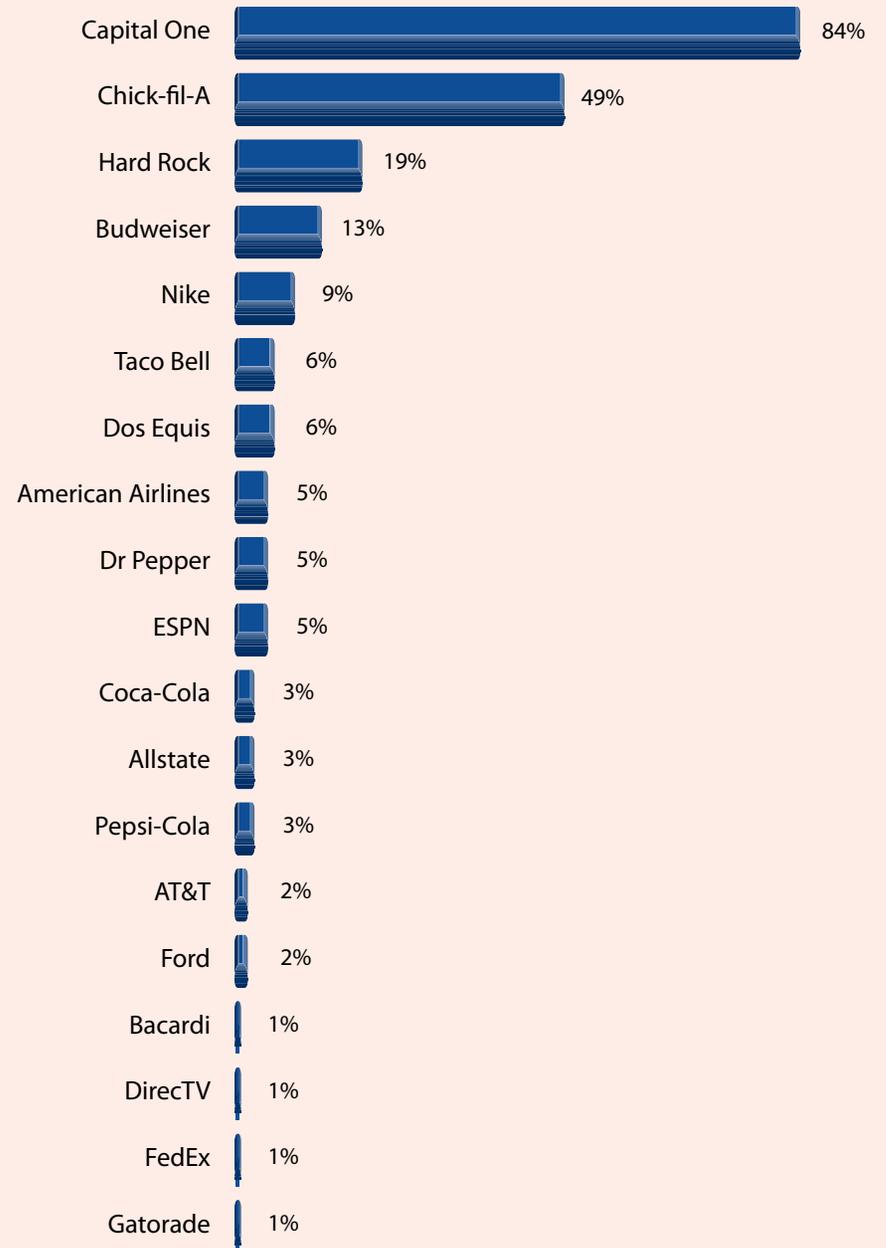
Quality of food and beverage

Sponsor Recall and Appreciation

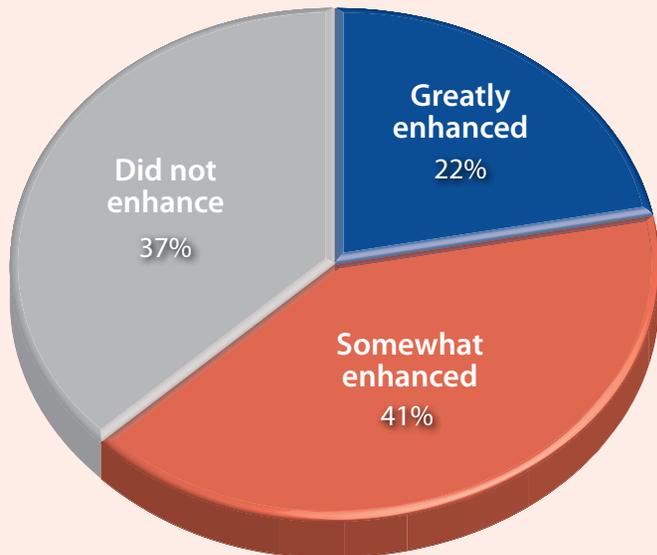
Sponsor Recall



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



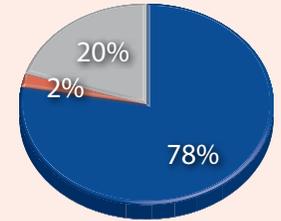
Extent to which brands and sponsors enhanced experience



Brand Activation Evaluations

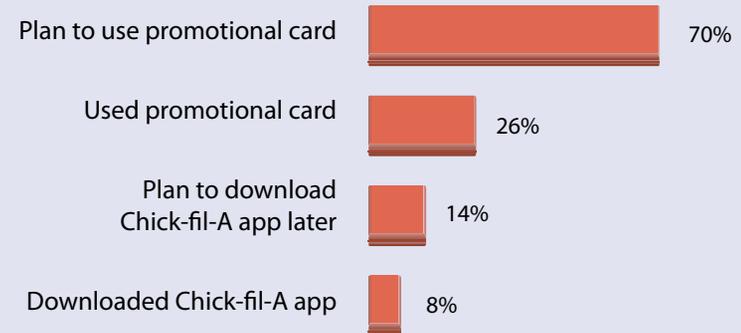


Chick-fil-A Card

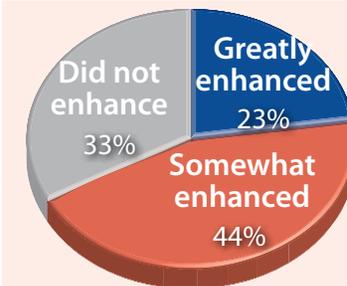


Noticed at seat and looked at it
 Noticed but did not look
 Did not notice

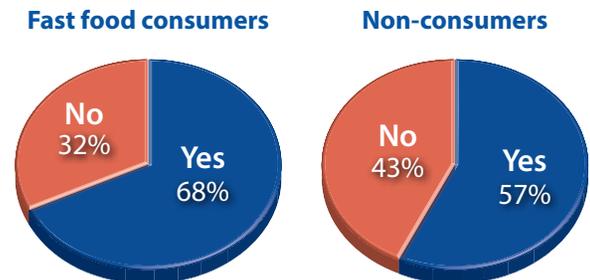
Actions taken or plan to take (among those who looked at card)



Extent enhanced event experience (among those who entered)



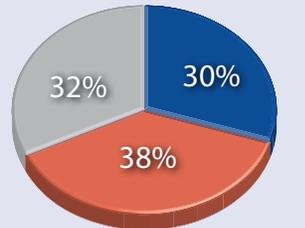
More likely to purchase from Chick-fil-A before game (among those who entered)



Brand Activation Evaluations



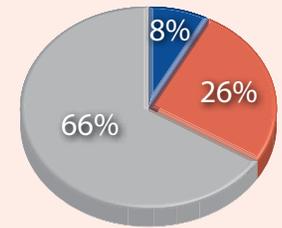
Capital One Fan Fest



Entered activation
Saw from outside
Did not see

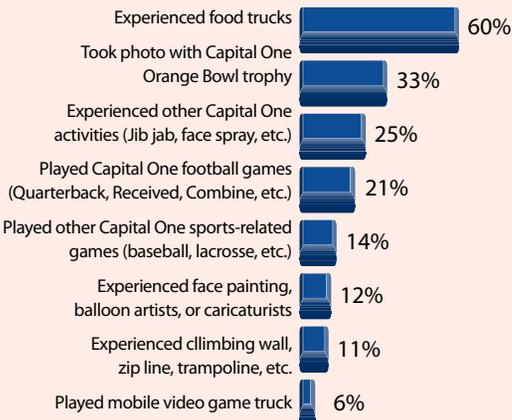


Dos Equis Bars

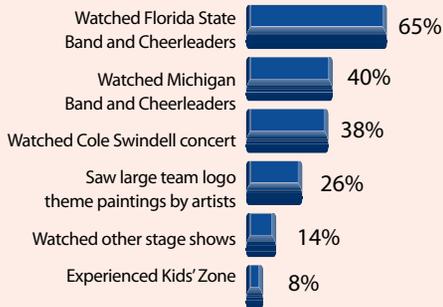


Made a purchase
Saw but did not make purchase
Did not see

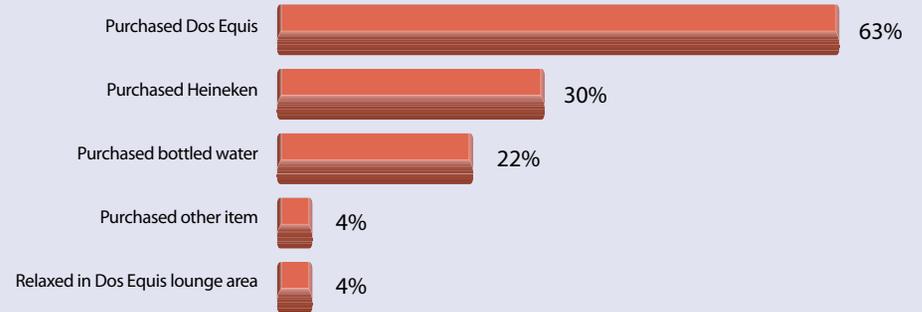
Activities participated (among those who entered)



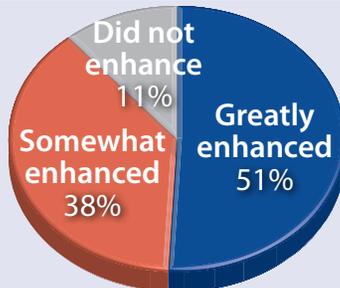
Pre-game entertainment experienced (among those who entered)



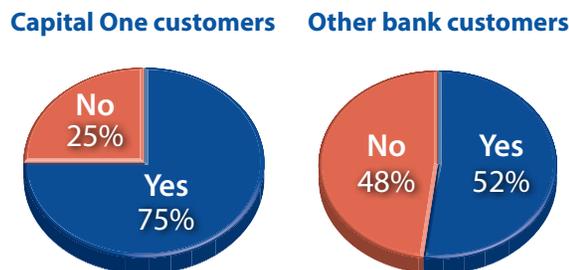
Purchases at bars (among those who made purchases)



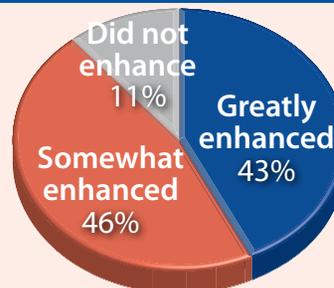
Extent enhanced event experience (among those who entered)



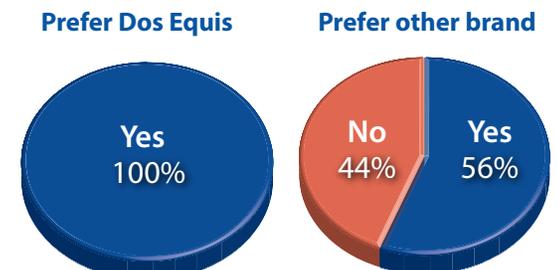
More likely to do business with Capital One than before game (among those who entered)



Extent enhanced event experience (among those who entered)



More likely to purchase Dos Equis than before game (among those who entered)



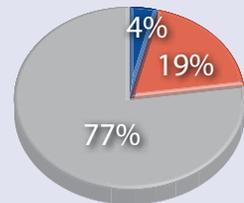
Brand Activation Evaluations



RANK

Participation: 4 of 5
Enhancement: 3 of 5

Ticket Galaxy Tent



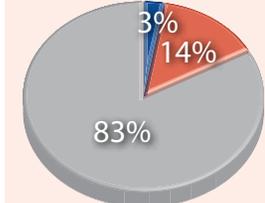
Entered activation
Saw from outside
Did not see



RANK

Participation: 5 of 5
Enhancement: 5 of 5

Lumber Liquidators Tailgate Tour

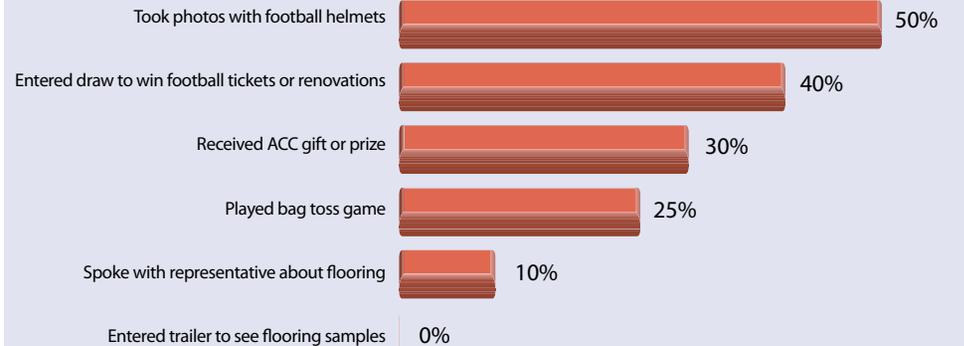


Entered activation
Saw from outside
Did not see

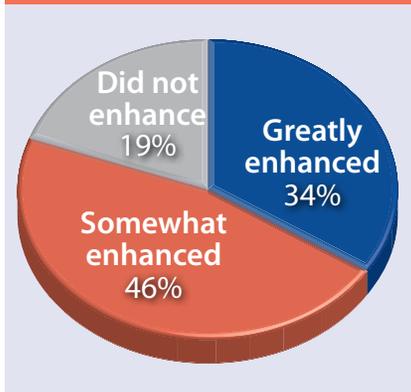
Activities participated (among those who entered)



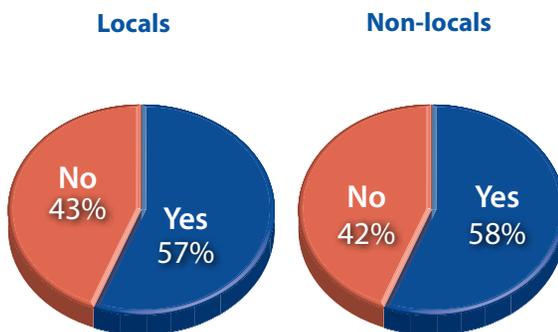
Activities participated (among those who entered)



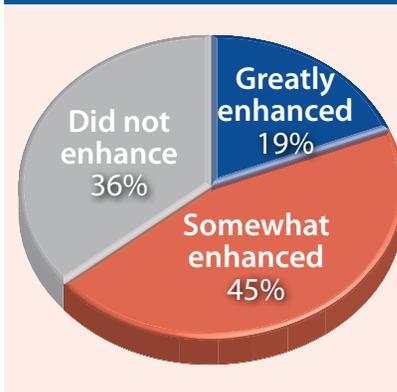
Extent enhanced event experience (among those who entered)



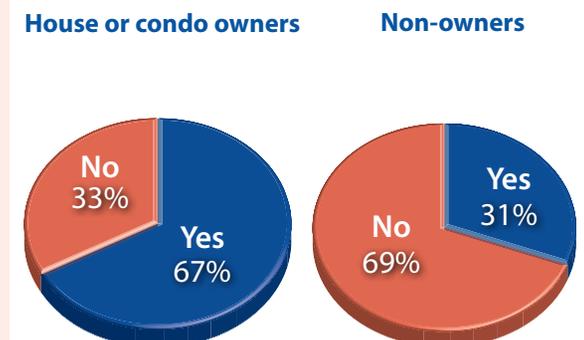
More likely to purchase from Ticket Galaxy than before game (among those who entered)



Extent enhanced event experience (among those who entered)



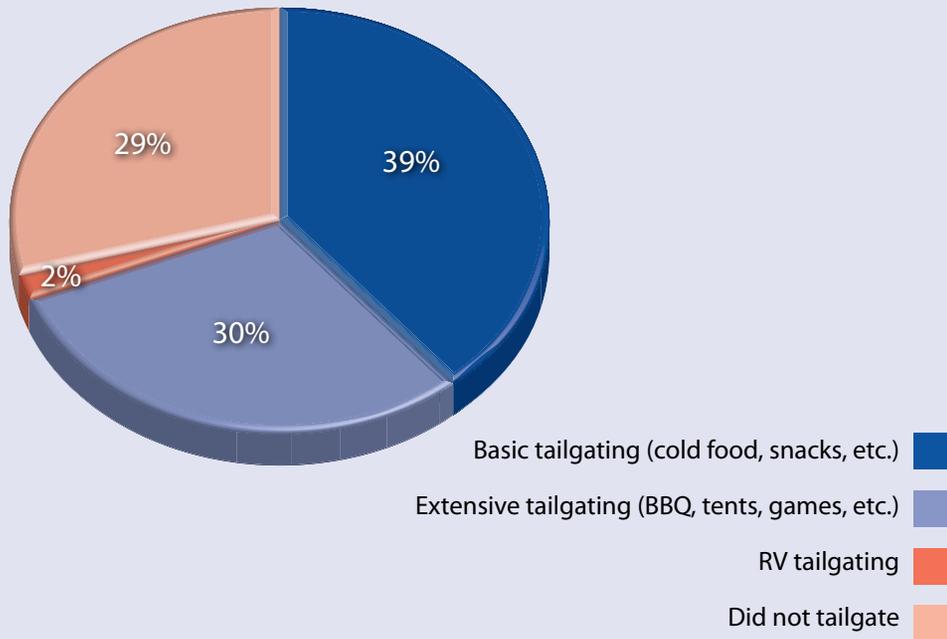
More likely to purchase from Lumber Liquidators than before game (among those who entered)



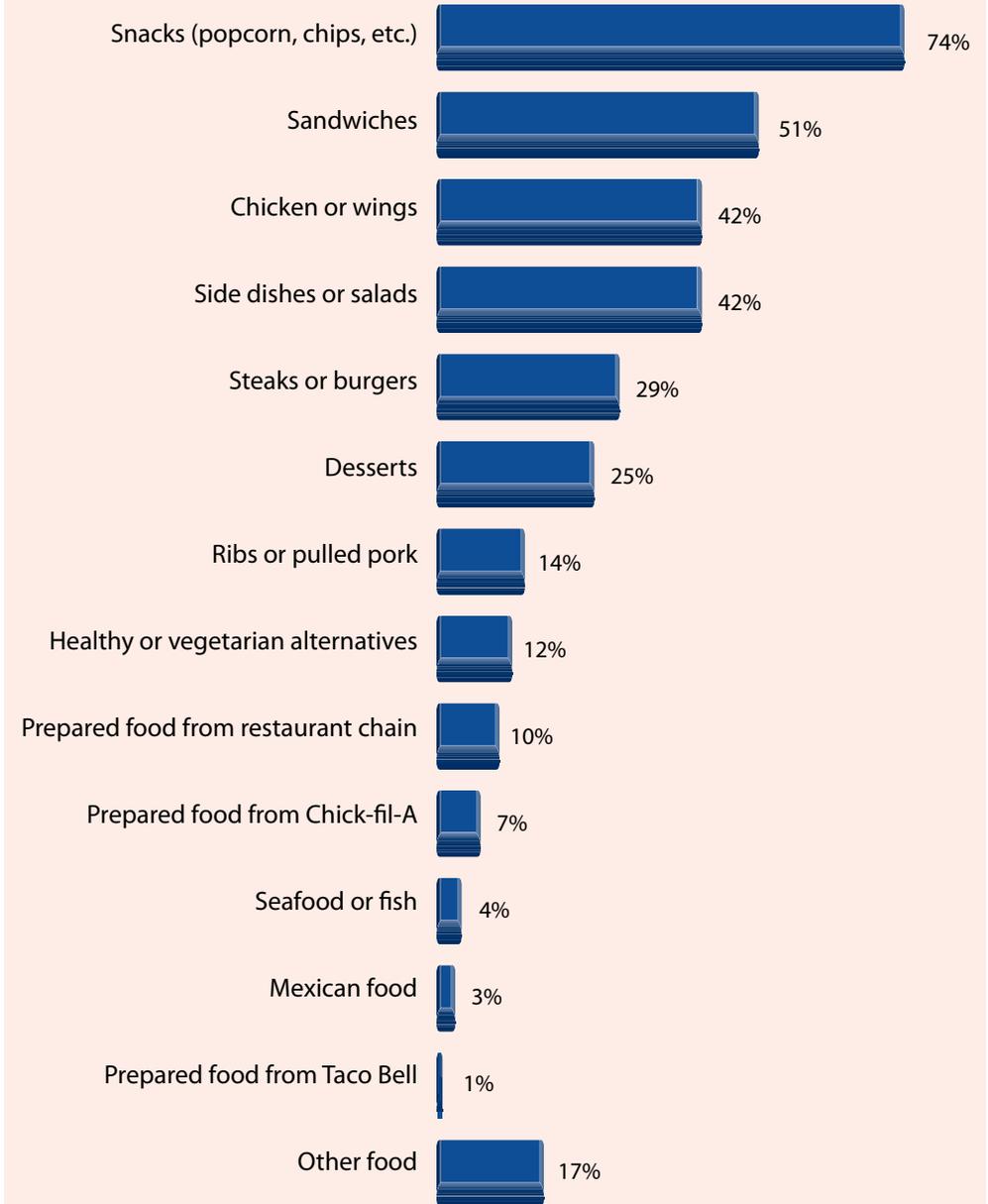
Tailgating



Tailgating participation



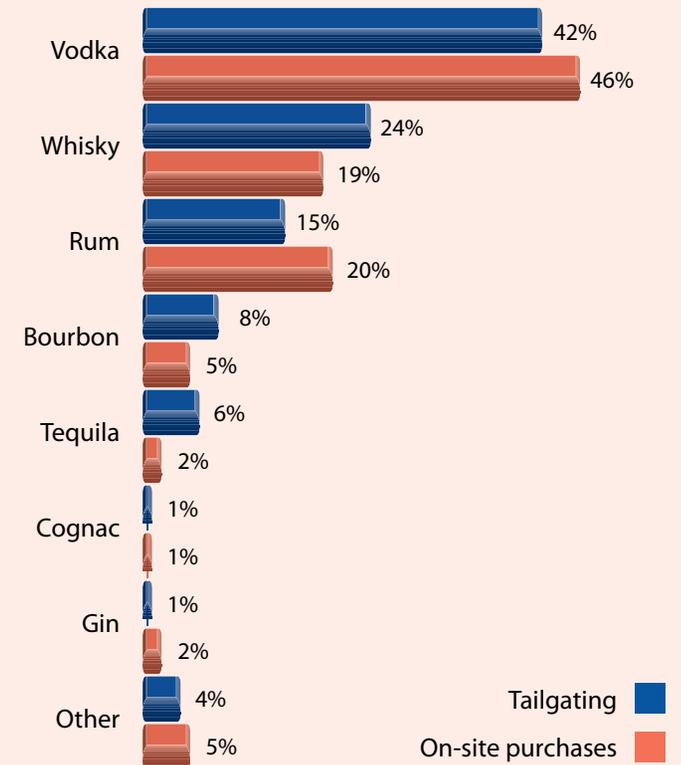
Types of food consumed during tailgating (among tailgaters)



Beverage Consumption

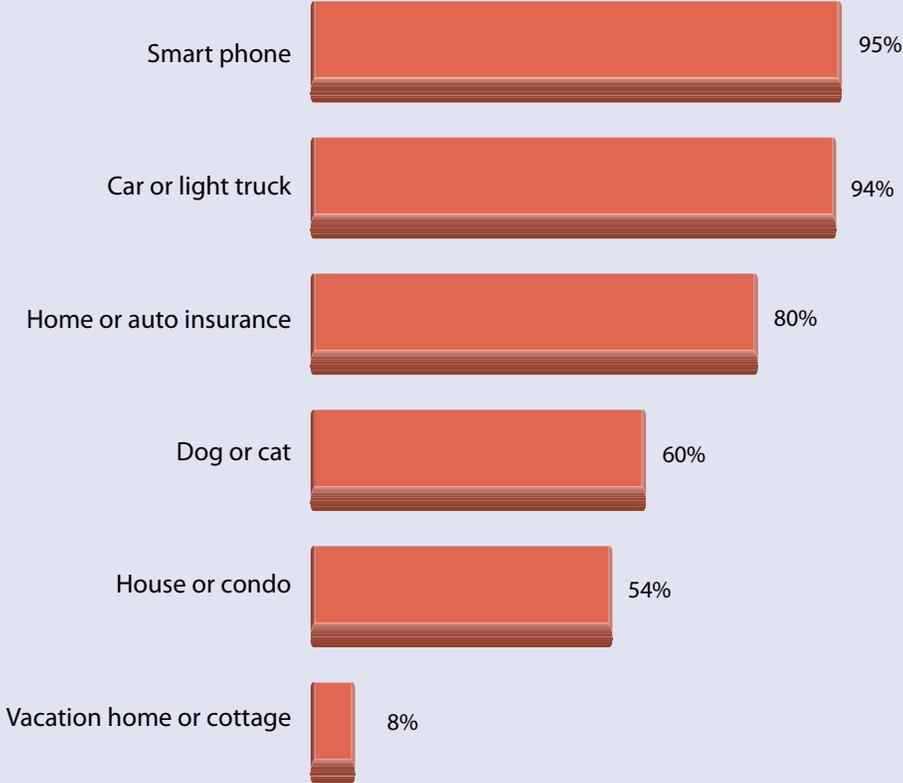
Beverages consumed on-site	Tailgating		On-site Purchases	
	Percentage consumed on-site	Average consumed at event (among consumers)	Percentage consumed on-site	Average consumed at event (among consumers)
Beer	90%	3.2	58%	2.7
Liquor or spirits	66%	2.4	20%	2.3
Bottled or boxed water	58%	2.3	33%	1.7
Soda or soft drinks	53%	1.5	34%	1.5
Wine or wine coolers	24%	1.7	3%	1.7
Energy drinks	11%	1.3	2%	1.7
Juice	11%	1.4	1%	1.6
Coffee or coffee drinks	2%	1.2	3%	1.6
Other beverages	7%	2.0	5%	1.3

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

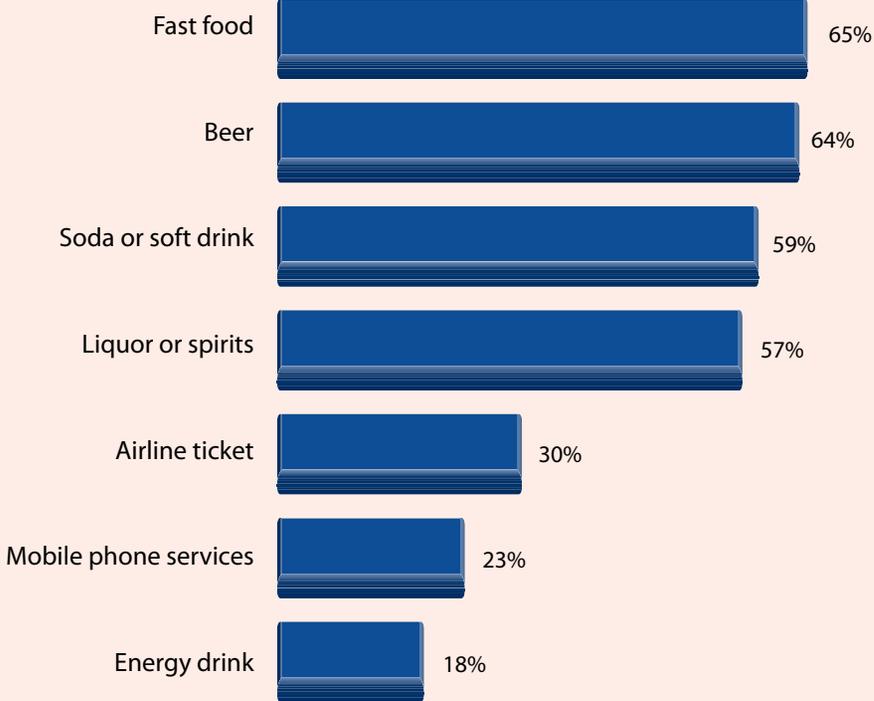


Product Ownership and Use

Product ownership

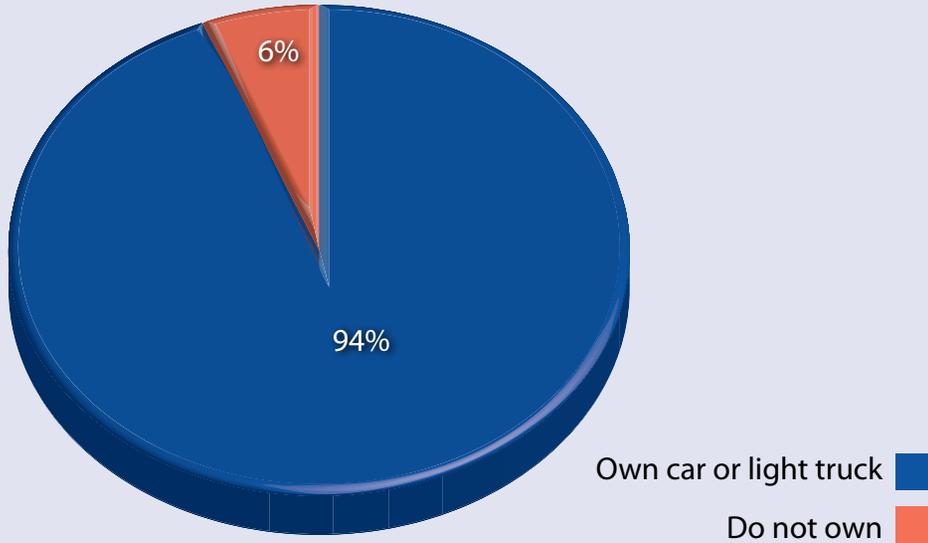


Products purchasing within next 30 days

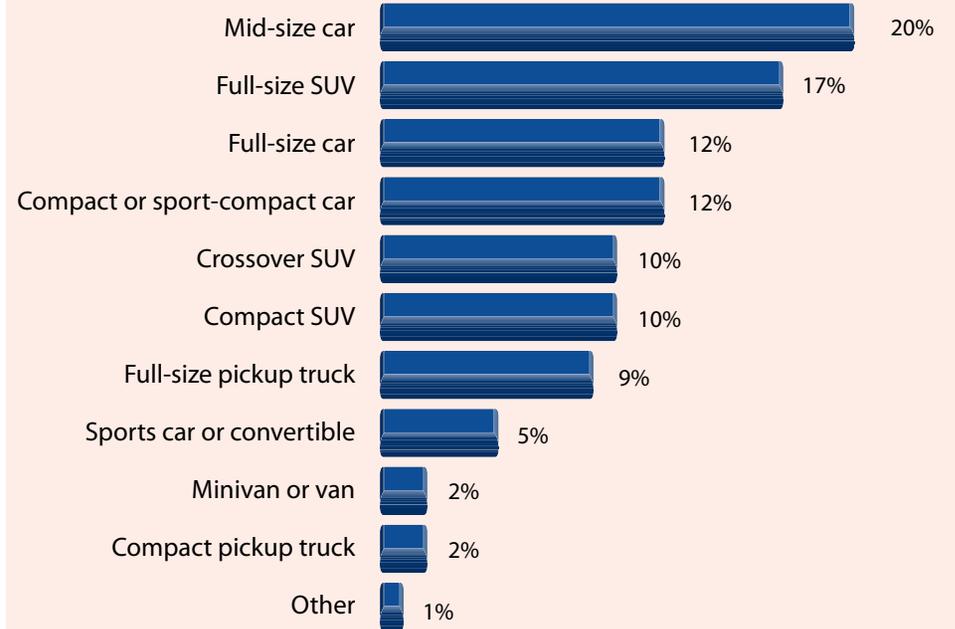


Vehicle Preferences

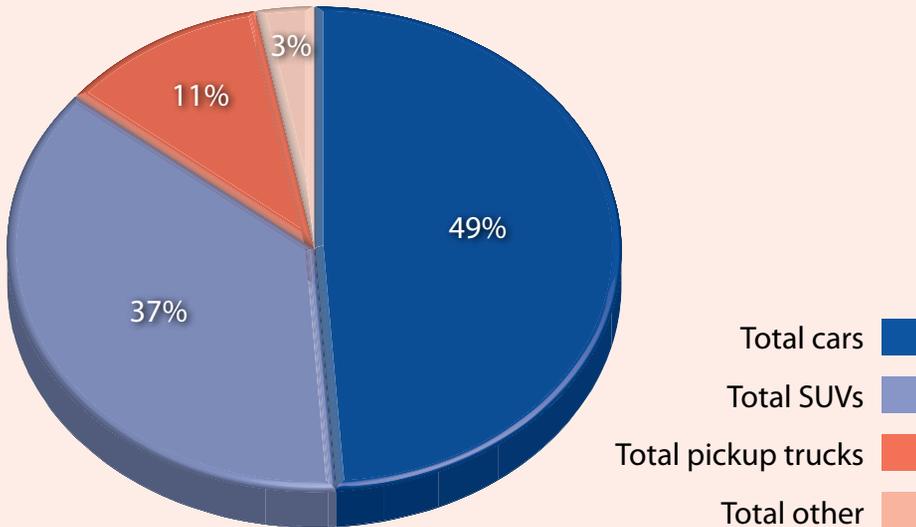
Vehicle ownership



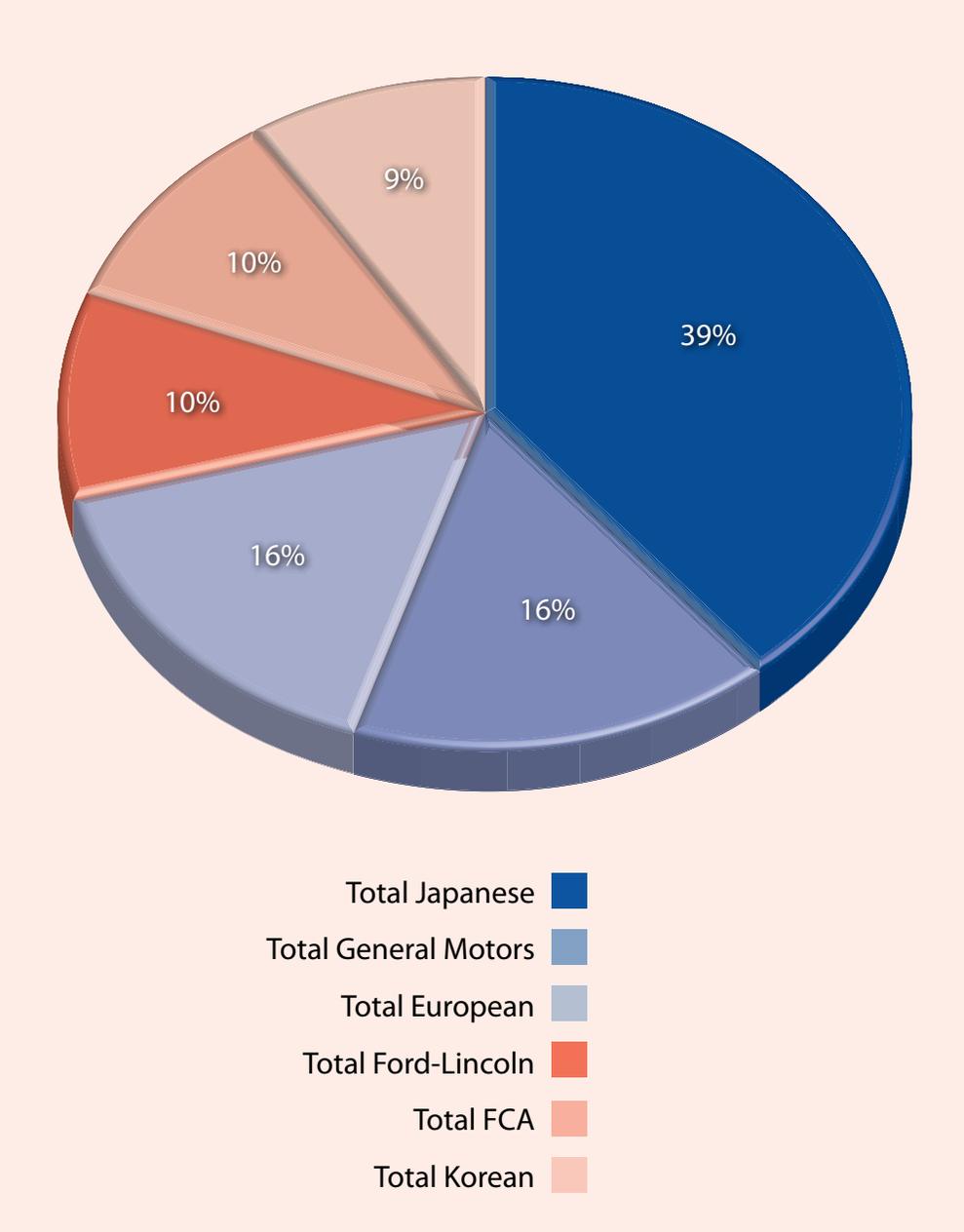
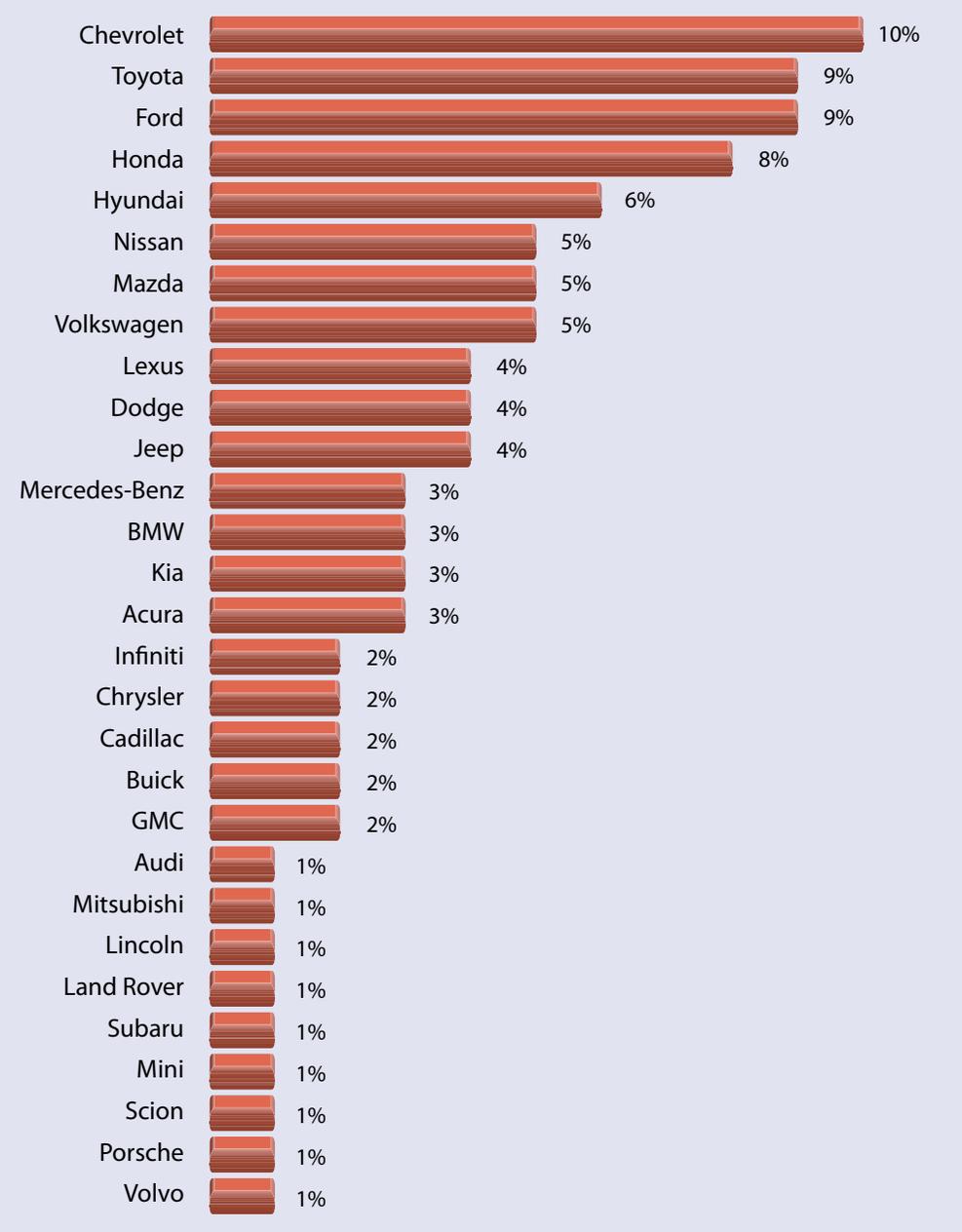
Type of vehicle driven (among owners)



Total Vehicles

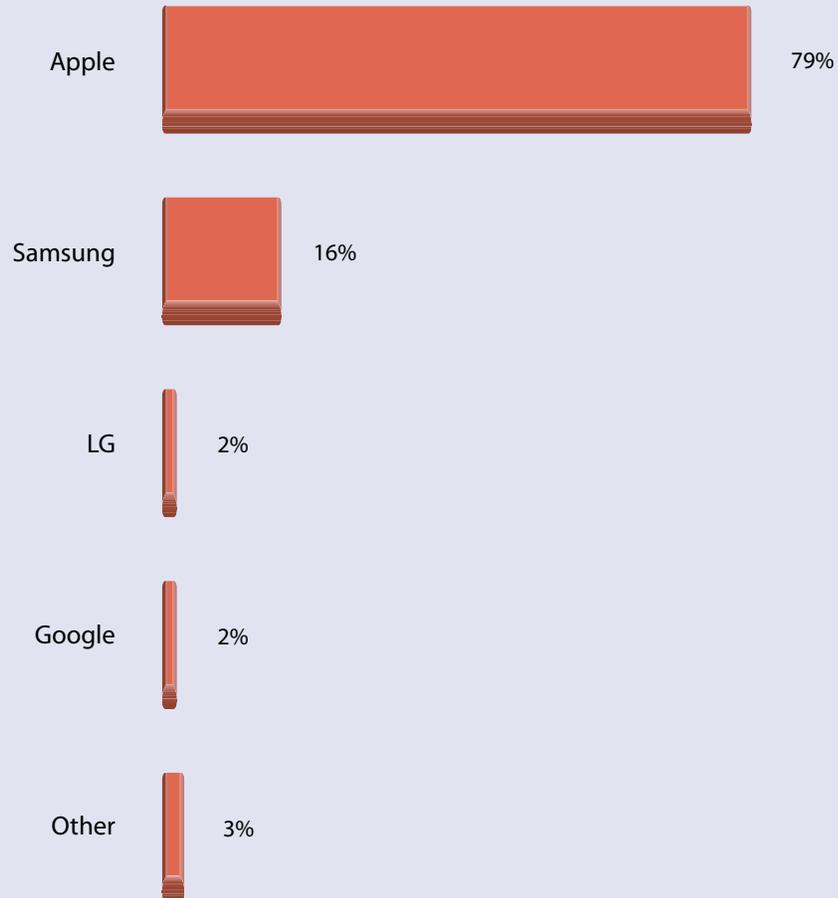


Brand of Vehicle Driven (among owners)

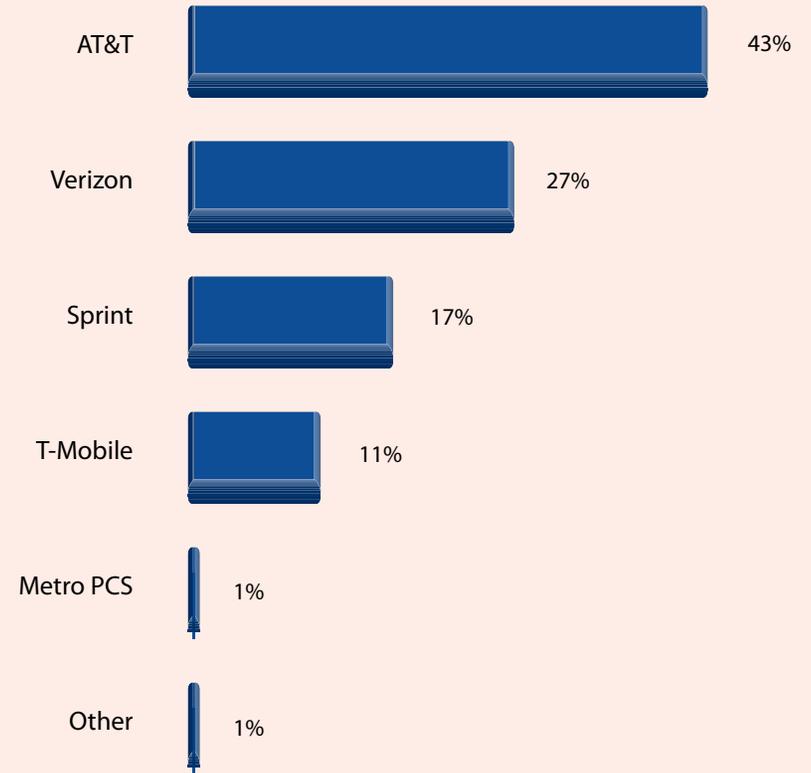


Telecommunications Brand Preferences

Smart phone or tablet used most often (among owners)

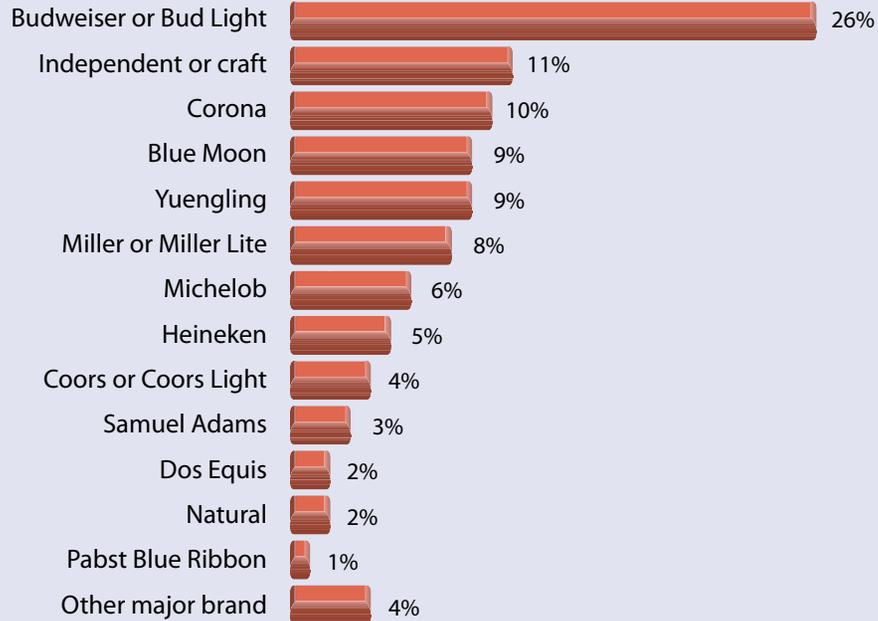


Wireless service provider (among users)



Beverage Brand Preferences

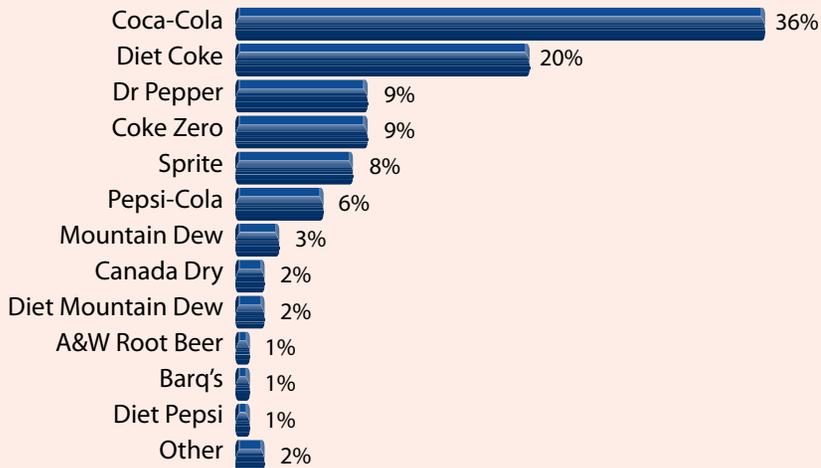
Beer brand drink most often (among beer drinkers)



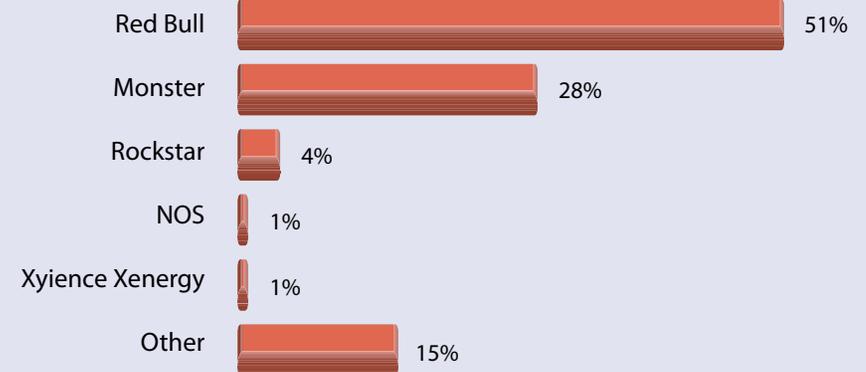
Preferred liquor or spirits brand (among liquor drinkers)



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

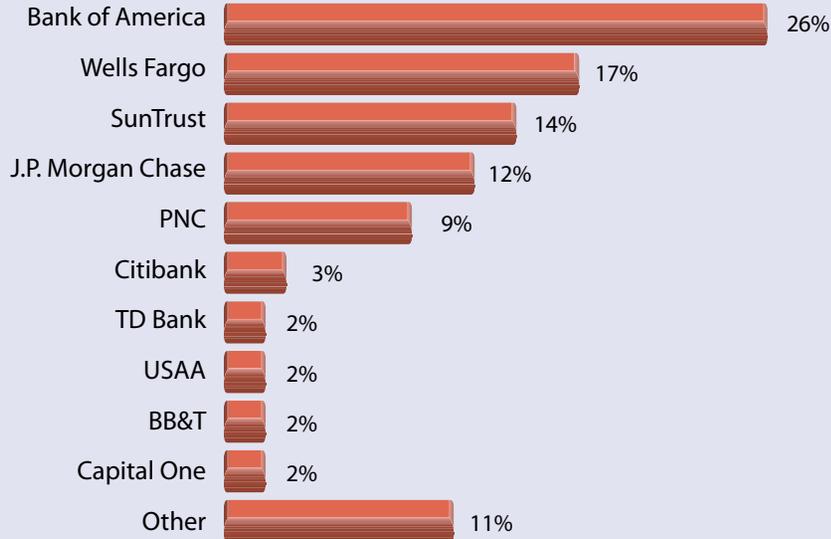


Preferred energy drink brand (among energy drink consumers)

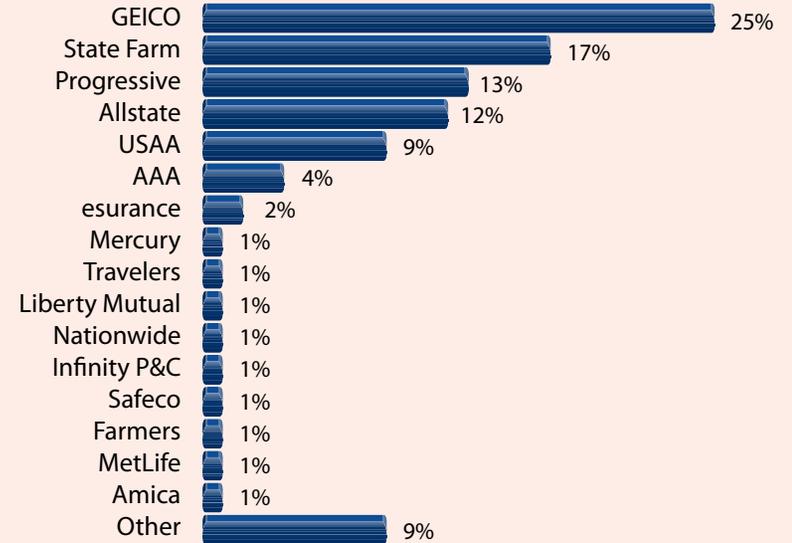


Bank, Insurance, and Airline Brand Preferences

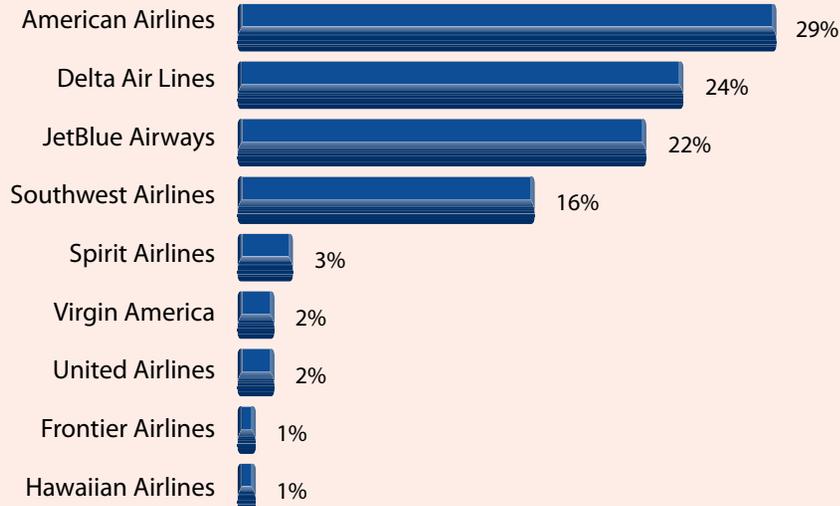
Bank used most often



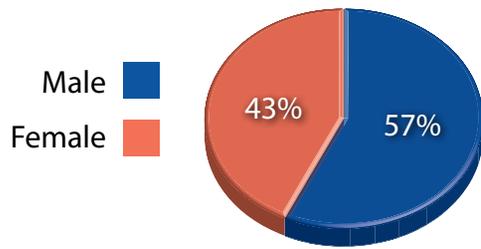
Auto insurance company



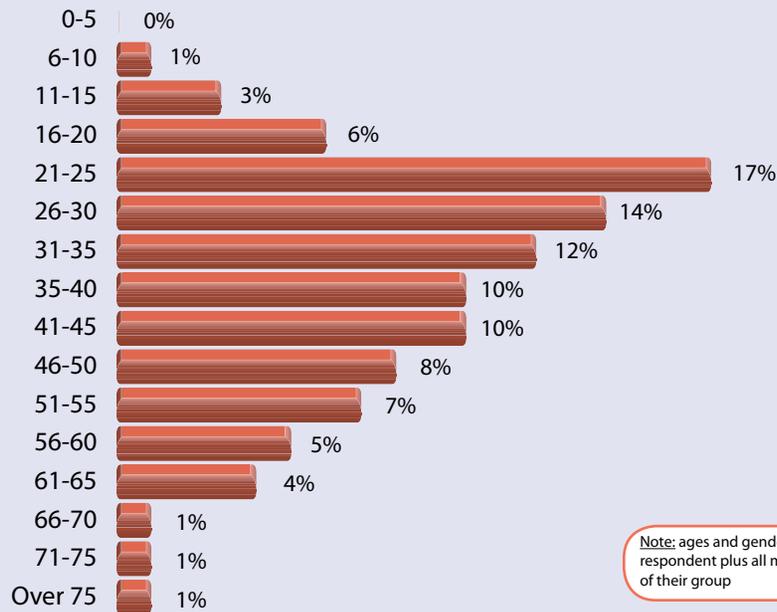
Preferred US airline (among those flying within 30 days)



Demographics of Attendees

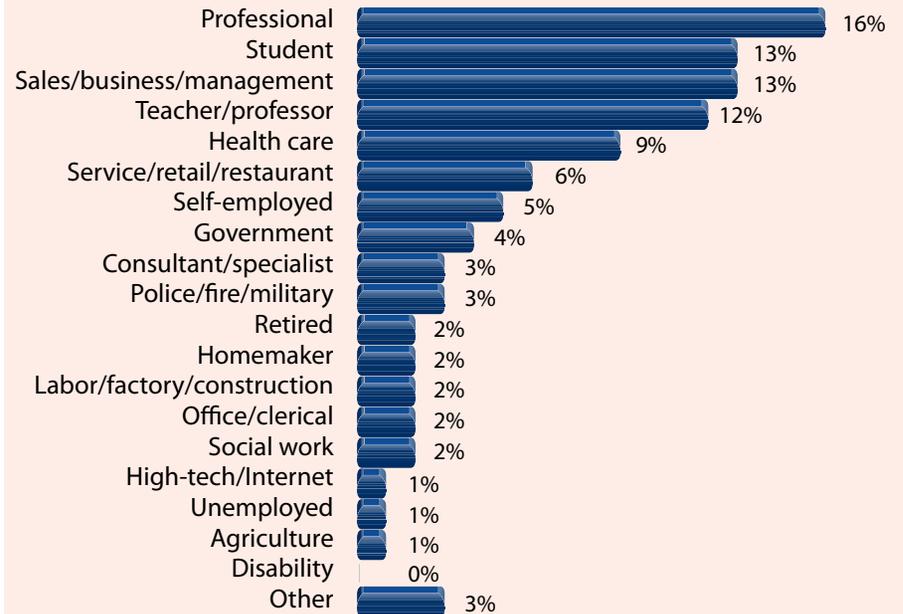


Age categories

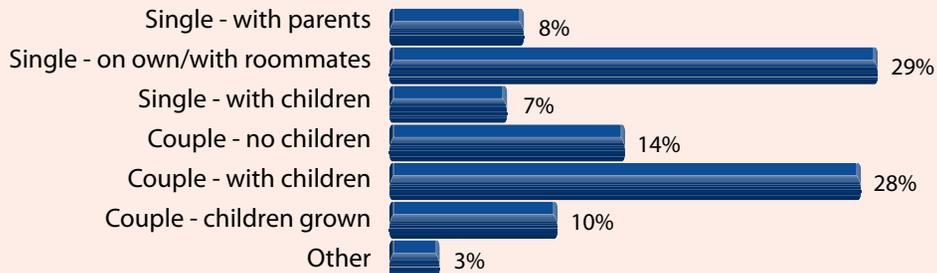


Note: ages and genders include respondent plus all members of their group

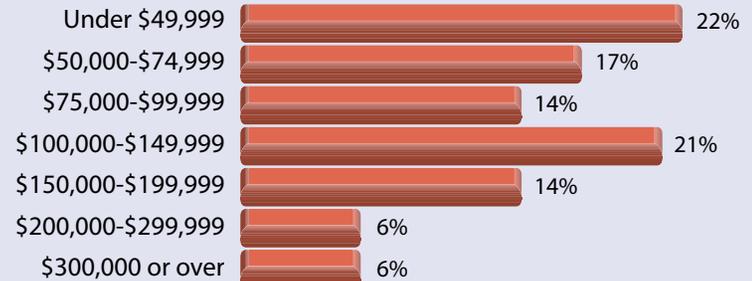
Occupation



Current living situation



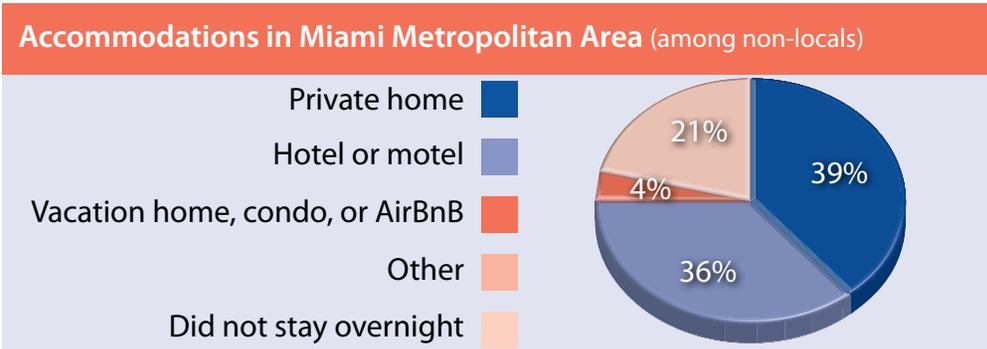
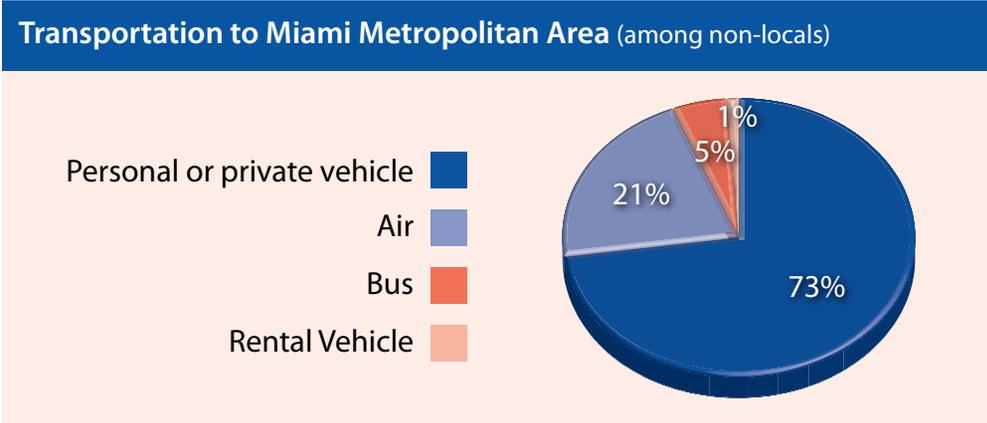
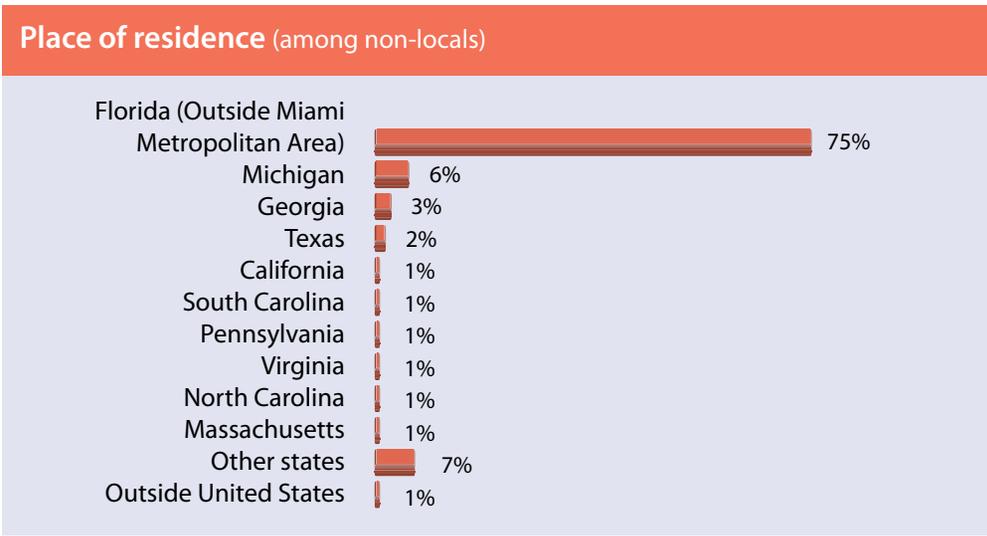
Household income (before taxes)



Tourism and Economic Impact

Estimated attendance	
Total person-visits (from published attendance)	67,400
Average visits per person	1.0
Estimated unique attendees	67,400
Total locals (Miami Metropolitan Area)	40,440 (60%)
Total non-locals (outside Miami Metropolitan Area)	29,960 (40%)
Estimated unique attendees	67,400

Average nights stayed (all non-locals)	2.5 nights
Attendee hotel/motel room nights	8,700



Economic Impact of Attendees



Total spending by non-locals	\$31.6M
Economic impact (Industry output)	\$56.7M
Direct and indirect	\$47.4M
Induced	\$9.3M

Total employment supported (full-year job equivalents)	590
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Total taxes supported	\$7.4M
Federal	\$3.2M
State	\$1.7M
Local	\$2.5M

Spending by non-local attendees	
Admission tickets	\$9,500,000
Accommodations	\$6,800,000
Restaurants outside stadium	\$3,000,000
Tailgating supplies	\$2,500,000
Groceries	\$2,200,000
Other entertainment within region	\$1,800,000
Concessions at stadium site	\$1,500,000
Parking, fuel, and repairs	\$1,400,000
Shopping and retail	\$1,300,000
Car rentals within region	\$700,000
Retail clothing	\$500,000
Public transit or taxis	\$200,000
Ride share services	\$200,000
Total spending by non-locals	\$31,600,000

Spending by local attendees (not economic impact)	
Admission tickets	\$12,900,000
Tailgating supplies	\$2,800,000
Concessions at stadium site	\$2,000,000
Parking and fuel	\$1,400,000
Restaurants outside stadium	\$800,000
Shopping and retail	\$800,000
Retail clothing	\$300,000
Ride share services	\$200,000
Public transit or taxis	\$100,000
Total spending by locals	\$21,300,000

Comments from Attendees

"Had a great time but wish we had more fan events before the day of the game!"

"Halftime show was awful and music blaring during timeouts was disrespectful to the collegiate bands on site."

"I had a great time at the Orange Bowl and I think Hard Rock stadium is beautiful. It was very nice that Capital One provided backpacks and Chick-fil-A provided gift cards."

"I think fans from both teams had a great time because the game was close and exciting. And the weather was perfect!"

"I wanted to give my son the best Christmas gift. I don't regret one penny I spent because it was the happiest moment of his life!"

"I was disappointed to not hear either the FSU or Michigan band due to the fact that the stadium DJ was playing music too loud! This is a college football game and the school bands greatly enhance the experience."

"I'd like to see more Nike branded products being sold with the Orange Bowl logo. There wasn't a whole lot to choose from in terms of memorabilia and clothing."

"I'll go wherever FSU goes. I'm not on the bandwagon I'm an Alumna!"

"It was the best football game I've ever attended and all the little extras were awesome."

"Leaving parking lots took way way too long. We stayed to watch the awards ceremony and then waited in the car a full hour to leave the lot."

"Miami is the best city on planet."

"No Dr Pepper at an event sponsored by Dr Pepper! Kids were annoyed."

"Parking lots should have been opened earlier for tailgating. Many of us got there in the morning and had to wait until after 2pm to park."

"Tell the people at the concessions to stop asking for tips!!! It's rude and unprofessional."

"The backpacks were a nice touch! Entertainment was fantastic and we really enjoyed it."

"The Live Más scarves in the FSU student section were a very nice touch on a chilly Florida night! We were big fans of that."

"The sunset was awesome. And I won Chick-fil-A breakfast for a year. Thanks!"

"We didn't know the Fan Fest was free with ticket as last year's Peach Bowl was separate ticket."

"Will not return to the Orange Bowl due to constantly being inundated with ads while in the stadium. In between every play we were blasted with ads as loud as the speakers would go."

"Wished we could have bought tickets directly from Orange Bowl. Ended up spending 60% more on Stubhub."



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 January 2, 2017
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.

