Pinckney Hugo Group:
The Great New York State Fair Market Research 2015

PinckneyHugoGroup

THE FAIR
THE GREAT NEW YORK STATE FAIR

September 18, 2015

Table of Contents

Research Overview & Findings

Research Objectives and Project Approach

Background & Objectives

The goal of this research is to provide insights as to what drives people to the State Fair, their perceptions of the Fair, the family friendliness of the Fair, as well as any recent positive or negative changes that they are aware of, particularly a number of new/newer exhibits.

Specifically objectives of this research include:

- Provide detailed feedback as to new exhibits such as the Taste of New York, the Dairy Cow Live Birthing Center, Equine Avenue, and the State Fair History Exhibit.
- Measure perceptions as to the “family friendliness” of the Fair.
- Gauge feedback on concerts and/or performers at the Fair.
- Detail recall of advertising about the Fair.
- Provide a description of the visitor, including who they are, where they reside, how much they spent at the Fair and how their tickets were purchased.

Research Approach

KS&R conducted exit interviews with Fair Goers as they left the Fairgrounds, much as we have done in past years.

- The interview lasted approximately 10 minutes
- No incentive/stipend was used
- The State Fair was identified as the sponsor of the research

The exit interviews were conducted August 29th through September 7th/Labor day as patrons exited.

Year	# of Completed Interviews
2015	**658**
2014	633
2013	613
2010	616
2009	630
2008	700
2006	1,030

Key Findings

Attendance

- Four out of five Fair Goers are regular patrons and indicate that they attend the Fair at least once a year.
- This year 31% of Fair Goers interviewed were from outside the Syracuse/Surrounding Area (more than 30 miles) versus 24% in 2014 – more consistent with past years.

Purchases/ Tickets

- Over one-half regard the Fair as 'Very Affordable,' highlighting a steady increase over the past years in this regard.
- The average 'spend' for a Fair Goer this year was $80.
- Ticket sales in 2015 were split between 'advanced' and 'at the gate.'
- Awareness of discounted admission days is high.

Perceptions of the Fair

- The majority of Fair Goers remain positive of the changes to the Fair this year.
- The Midway receives high ratings for its food, rides, and games.
- Over half of respondents were aware of the Wristbands/Megapasses, and of those aware, one-fourth report purchasing one or more – not significantly different from 2014.
- The Fair continues to be thought of as very 'Family Friendly.'

Key Findings

Attractions

- Food and Beverage continue to be the top draw, followed by Exhibits & Displays, Chevrolet Court, Agricultural Exhibits, and Arts & Crafts.
- The Butter/Cheese Sculptures and Dairy Products Building continue to be the most popular agricultural exhibits.
- Three-quarters are aware of the 'Taste of NY', and close to one-half for the Dairy Cow Live Birthing Center, State Fair History exhibit, and the new Equine Avenue demonstration.

Entertainment

- Fair Goers remain consistently positive about the entertainment acts at the Fair.
- Attendance at Chevy Court is up this year at close to one-half of those interviewed.

Advertising and Media

- Recall of Advertising is up this year vs. 2014 (84% vs. 78%) – similar to previous years.
- Readership of the Post Standard is leveling off at less than one-half of Fair Goers, but it is still read by 43%.

Attendance

Attendance Patterns

- 80% report that they attend at least once every year, with 30% making repeat visits – similar to past years.
- Most report spending 5 hours at the fair, and travel to the Fair directly from their homes.

Fair Attendance

(Unaided, Single Response)

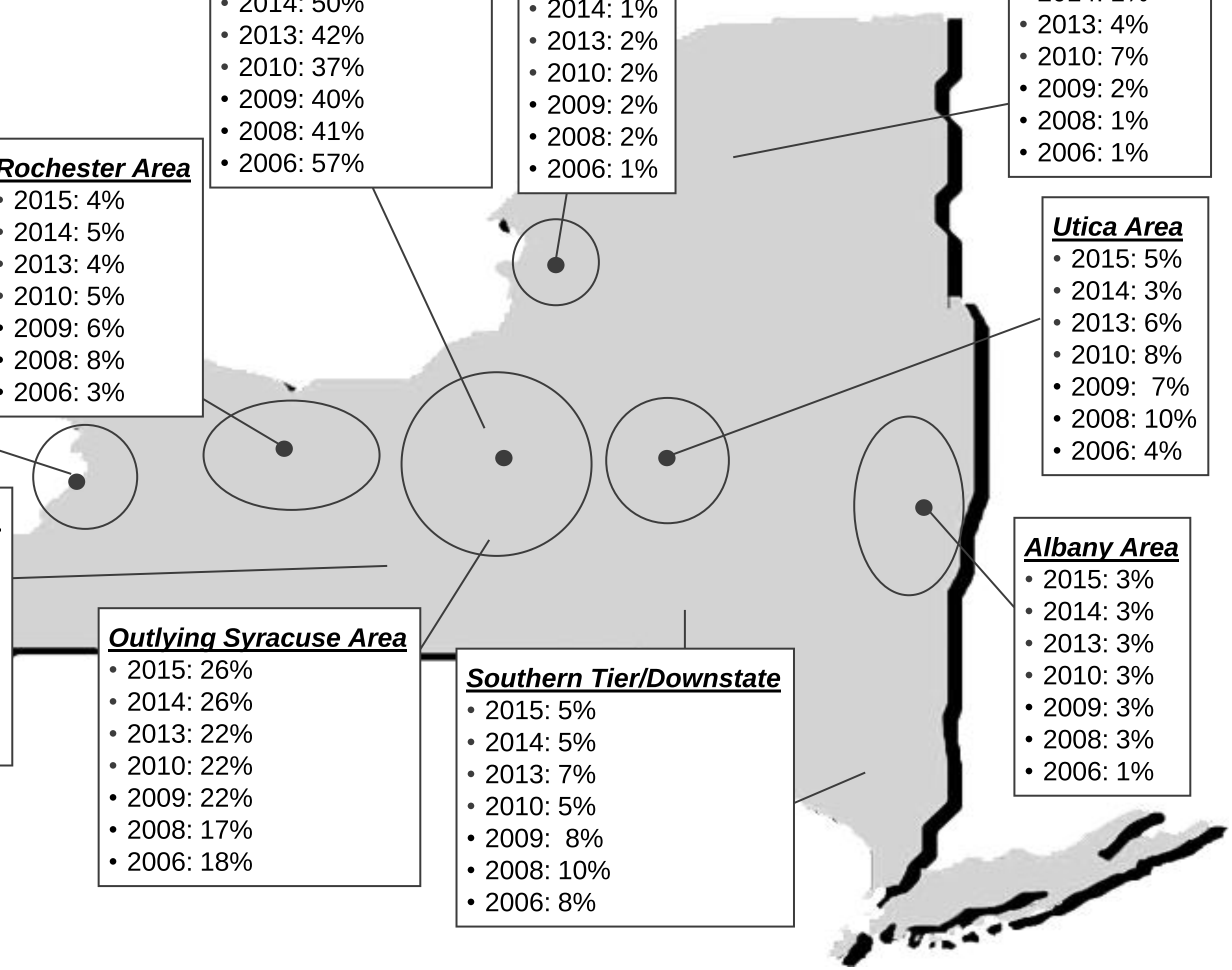
	2015 (n=592)	2014 (n=633)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)	2006 (n=1,030)
Multiple Times Each Year	30%	32%	21%	25%	29%	28%	-
Every Year	50%	49%	50%	42%	46%	52%	72%
Every Other Year	8%	8%	9%	7%	6%	8%	9%
Every 3-5 Years	6%	7%	8%	6%	5%	6%	7%
Less Frequently Than 5 Years	5%	4%	3%	4%	5%	6%	6%
First Time at the Fair	1%	10%	8%	16%	9%	12%	6%

2015	2014	2013
• The majority of Fair Goers spent 5 hours at the fair	5 hours	4.75 hours
• 48% planned on attending more than one day	53%	48%
• 89% traveled to the Fair from home (did not stay overnight anywhere)	92%	92%
• 90% have attended the Fair before	90%	92%

Geographic Distribution

- 69% of patrons reside in Syracuse or the surrounding area (vs. 76% in 2014) – indicating that more Fair Goers were traveling from outside the area to attend this year.
- The average distance traveled increased from previous years to about 66 miles.

The average attendee drove 66 miles to get to the Fair, compared to 48 in past years.



Syracuse & Suburbs
- 2015: 43%
- 2014: 50%
- 2013: 42%
- 2010: 37%
- 2009: 40%
- 2008: 41%
- 2006: 57%

Watertown
- 2015: 1%
- 2014: 1%
- 2013: 2%
- 2010: 2%
- 2009: 2%
- 2008: 2%
- 2006: 1%

North Country
- 2015: 1%
- 2014: 1%
- 2013: 4%
- 2010: 7%
- 2009: 2%
- 2008: 1%
- 2006: 1%

Rochester Area
- 2015: 4%
- 2014: 5%
- 2013: 4%
- 2010: 5%
- 2009: 6%
- 2008: 8%
- 2006: 3%

Buffalo Area
- 2015: 2%
- 2014: 1%
- 2013: 2%
- 2010: 2%
- 2009: 1%
- 2008: 0%
- 2006: 1%

Utica Area
- 2015: 5%
- 2014: 3%
- 2013: 6%
- 2010: 8%
- 2009: 7%
- 2008: 10%
- 2006: 4%

Out of State
- 2015: 5%
- 2014: 2%
- 2013: 4%
- 2010: 5%
- 2009: 4%
- 2008: 3%
- 2006: 3%

Finger Lakes
- 2015: 5%
- 2014: 4%
- 2013: 4%
- 2010: 4%
- 2009: 5%
- 2008: 3%
- 2006: 4%

Albany Area
- 2015: 3%
- 2014: 3%
- 2013: 3%
- 2010: 3%
- 2009: 3%
- 2008: 3%
- 2006: 1%

Outlying Syracuse Area
- 2015: 26%
- 2014: 26%
- 2013: 22%
- 2010: 22%
- 2009: 22%
- 2008: 17%
- 2006: 18%

Southern Tier/Downstate
- 2015: 5%
- 2014: 5%
- 2013: 7%
- 2010: 5%
- 2009: 8%
- 2008: 10%
- 2006: 8%

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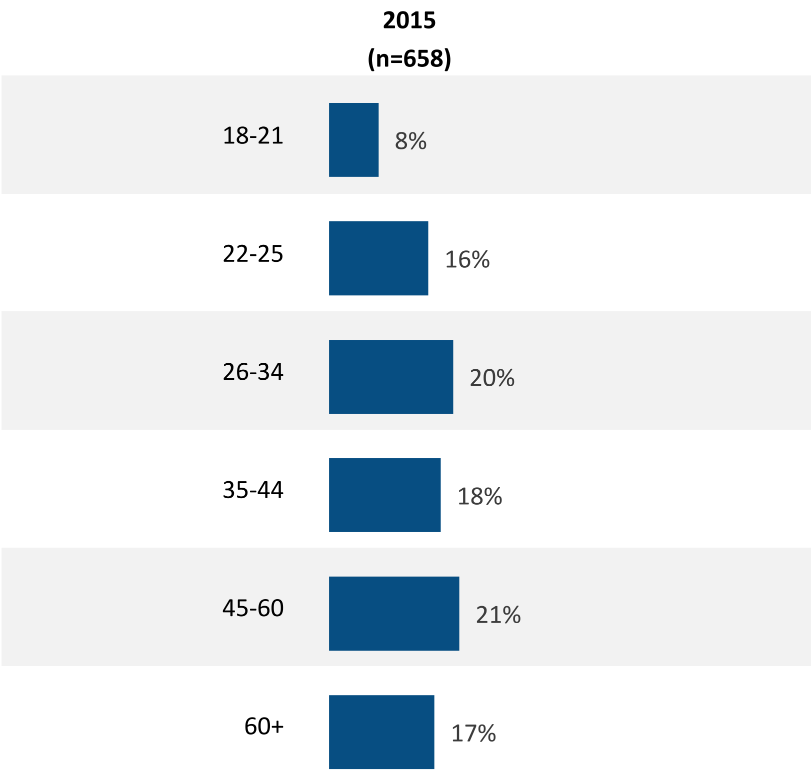
Respondent Age/Household Income

- Fair Goers come from a wide range of ages and different household incomes.

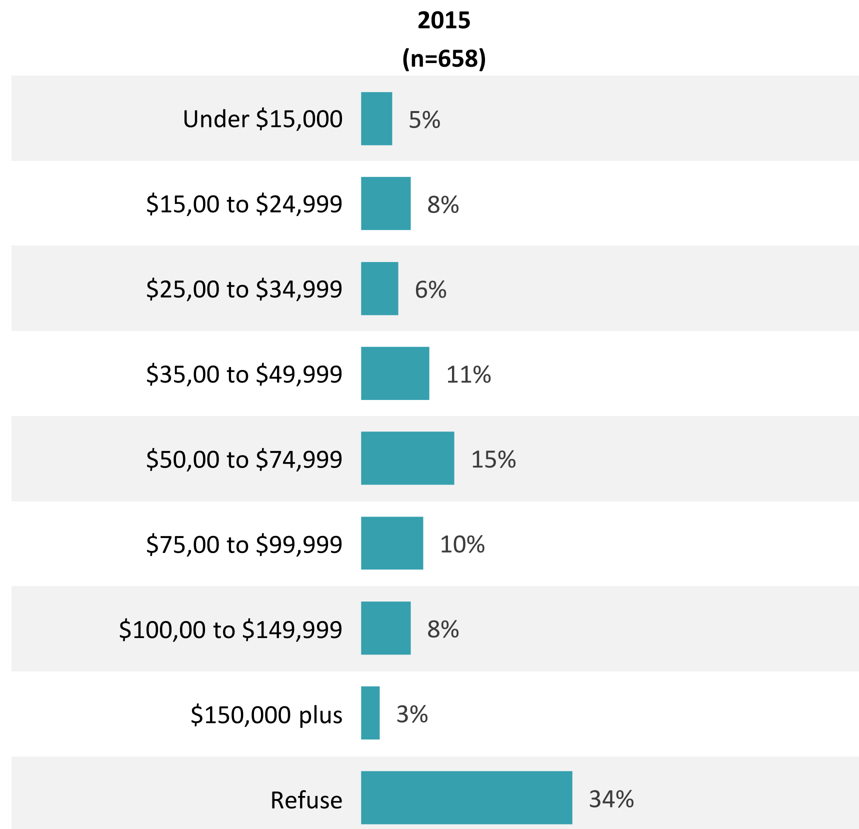
Respondent Age

(Aided, Single Response)



Respondent Household Income

(Aided, Single Response)



KS&R Data to Knowledge

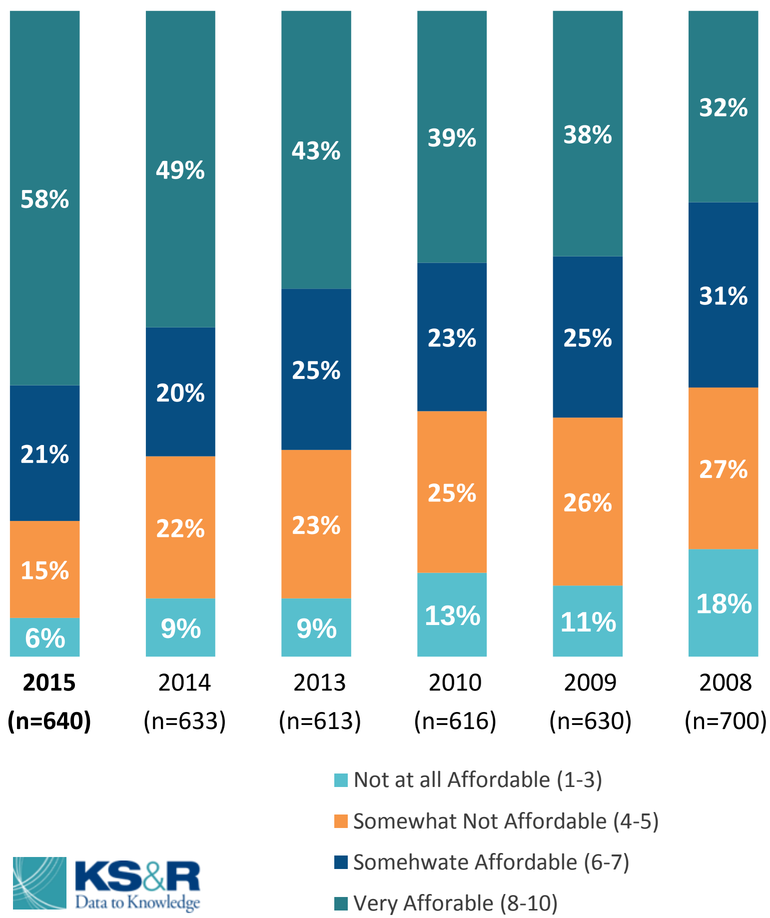
Purchases/Tickets

Affordability/Spending

- Over one-half regard the Fair as Very Affordable, highlighting a steady increase over the past years.
- Average amount that Fair Goers report spending is $80 this year, more than the recent past.

Rating of how Affordable the Fair is

(10-point scale)



Total Amount Spent not including Parking or Admission

(Open-End, Single Response)

	2015 (n=658)	2014 (n=633)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)	2006 (n=1,030)
None*	3%	4%	0%	6%	1%	2%	-
$1 - $25	19%	21%	21%	15%	18%	15%	17%
$26 - $50	29%	17%	23%	13%	16%	15%	25%
$51 - $75	10%	20%	22%	18%	19%	21%	20%
$76 - $100	19%	6%	7%	9%	8%	9%	5%
$101 - $200	14%	22%	8%	19%	20%	25%	17%
$200+	6%	6%	8%	13%	13%	12%	7%
Refused	0%	4%	1%	7%	5%	1%	2%

* Only admissions and parking

Mean Spent	
2015	**$80**
2014	$68
2013	$78
2010	$89
2009	$88
2006	$60

KS&R Data to Knowledge

Purchase Categories

- Food and beverages continue to be the top items purchased, followed by souvenirs, games, and rides.

Purchase Breakdown

(Aided, Multiple Response)

	2015 (n=658)	2014 (n=584)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=1,030)	2006 (n=1,030)	**2015**	2014	2013	2010	2009	2008	2006
Food and beverages	**98%**	94%	94%	83%	90%	95%	98%	**$38**	$35	$38	$42	$44	$40	$31
Souvenirs (T-Shirt, Fair trinkets, etc.)	**27%**	26%	30%	21%	31%	28%	29%	**$40**	$40	$39	$35	$41	$41	$32
Games at Midway	**26%**	26%	28%	23%	18%	21%	24%	**$30**	$26	$25	$23	$30	$25	$23
Rides at Midway	**21%**	24%	21%	22%	19%	21%	23%	**$37**	$34	$33	$32	$37	$34	$38
Jewelry/clothing	**11%**	8%	13%	11%	12%	15%	16%	**$38**	$30	$40	$39	$32	$37	$31
House wares, etc. at Center of Progress Building	**8%**	5%	7%	9%	10%	12%	11%	**$38**	$45	$40	$44	$71	$41	$43
Concert tickets	**4%**	3%	8%	8%	7%	8%	2%	**$30**	$83	$93	$145	$73	$141	$61
Other	**21%**	15%	9%	8%	7%	10%	14%	**$41**	$41	$40	$34	$61	$52	$43

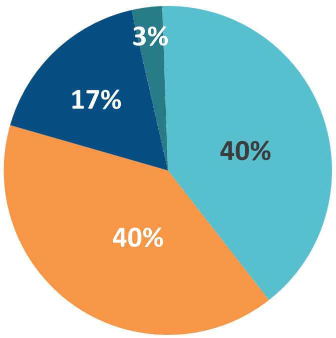
Ticket Purchases

- This year the split between advanced ticket sales and the gate was even.
- Only 6% of the Advanced Ticket Sales were purchased though Etix.com.

Ticket Purchase

(Aided, Single Response)

2015
(n=658)



	2014 (n=633)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)	2006 (n=999)
Advance	53%	58%	54%	55%	56%	68%
At Gate	30%	26%	36%	32%	29%	22%
Free Ticket	17%	16%	10%	13%	15%	7%
Other Specials	--	--	--	--	--	--

Where Tickets were Purchased

(Aided, Single Response of those who purchased tickets in Advance Sale Program or Other Specials)

	2015 (n=283)	2014 (n=338)	2013 (n=353)	2010 (n=330)	2009 (n=340)	2008 (n=392)
Retail Store	72%	76%	82%	68%	76%	68%
Bank	2%	6%	7%	9%	11%	7%
Online through Etix	6%	--	--	--	--	--
State Fair Box Office	3%	2%	2%	1%	1%	3%
Other	17%	12%	9%	22%	11%	17%

Ticket Purchases

- Wegmans continues to be the top retail store for Advanced Ticket Sales, followed by Tops and Price Chopper.

Retail Store Purchased

(Aided, Single Response)

	2015 (n=200)	2014 (n=258)
Wegmans	42%	47%
Tops	30%	26%
Price Chopper	18%	19%
Kinney Drugs	8%	7%
Other	2%	1%

72% Purchased through Retail Store

Online Ticket Purchases

(Aided, Multiple Response)

6% Purchased through Etix
- 13/13 Purchased Single Day Admission
- 1/13 Purchased Single Day Ride Pass

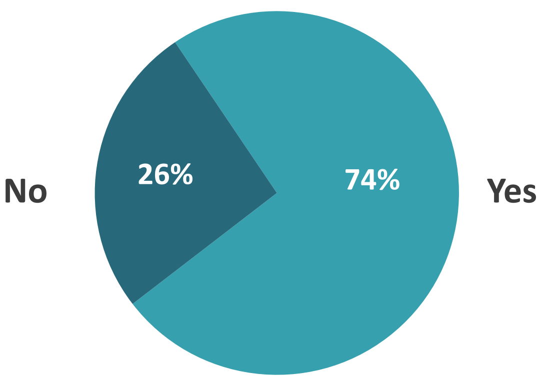
Ticket Sales Awareness

- Awareness of the availability of advance purchase options remains high at three-quarters.
- Awareness of online options is lower, but more than one-third were aware that this is an option.

Awareness of Advance Ticket Sales Among Gate Purchasers

(Open-End, Single Response)

2015
(n=375)

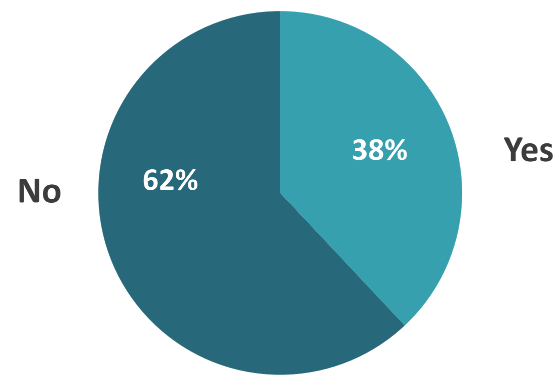


	2013 (n=159)	2010 (n=222)	2009 (n=284)	2008 (n=203)	2006 (n=220)
% Aware	70%	67%	71%	75%	80%

Awareness of Online Ticket Sales Among Non-Online Purchasers

(Open-End, Single Response)

2015
(n=645)

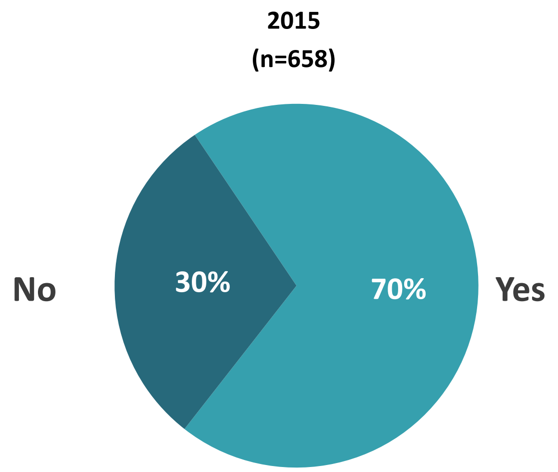


Discount Admission Day Ticket Sales Awareness

- Awareness of Discounted Admission Days is high – almost three-quarters.
- Of those aware of the Discount Admission Day, most cited $3 Thursday and Dollar Day Labor Day as the top two days.

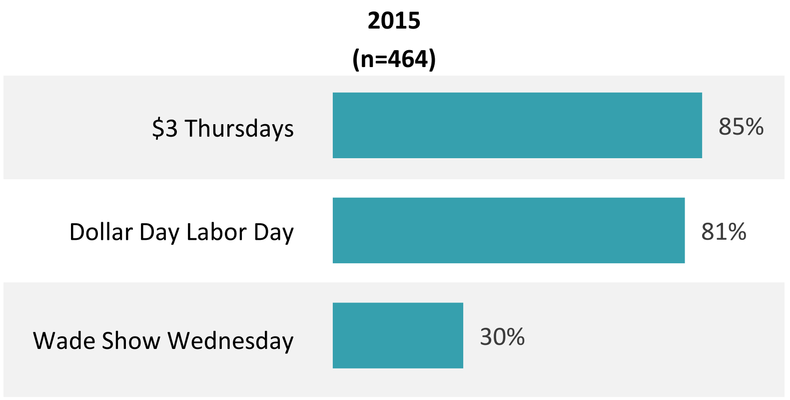
Awareness of Discounted Admission Days

(Open-End, Single Response)



Which ones?

(Unaided, Multiple Response)



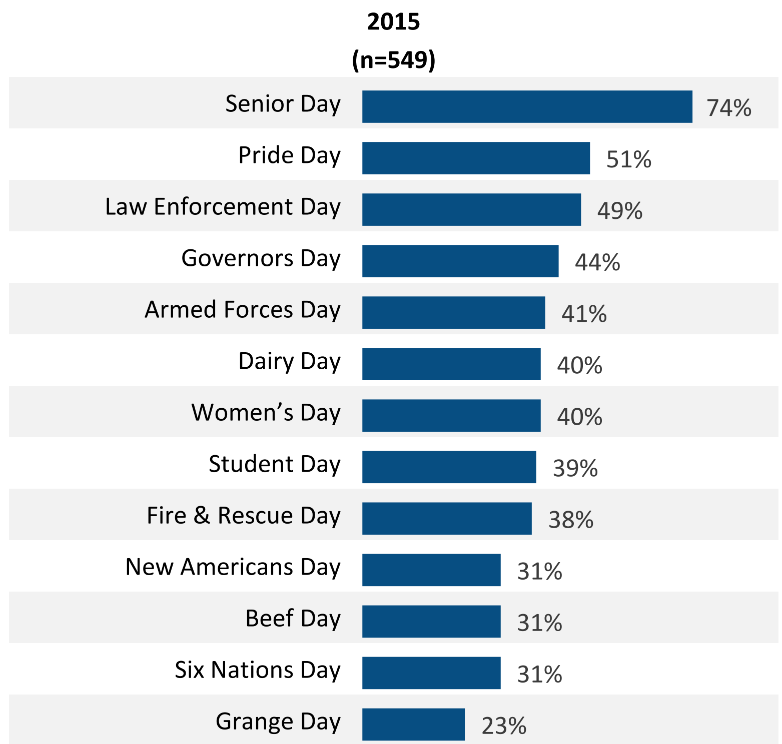
21% of Fair Goer said these discounted admission days impacted their attendance at the Fair

Special Day Awareness

- Senior Day is the most well known Special Day among Fair Goers; Pride Day and Law Enforcement Day follow.

Awareness of Special Days

(Aided, Multiple Response)



16% of Fair Goer said these Special Days affected their attendance to the Fair

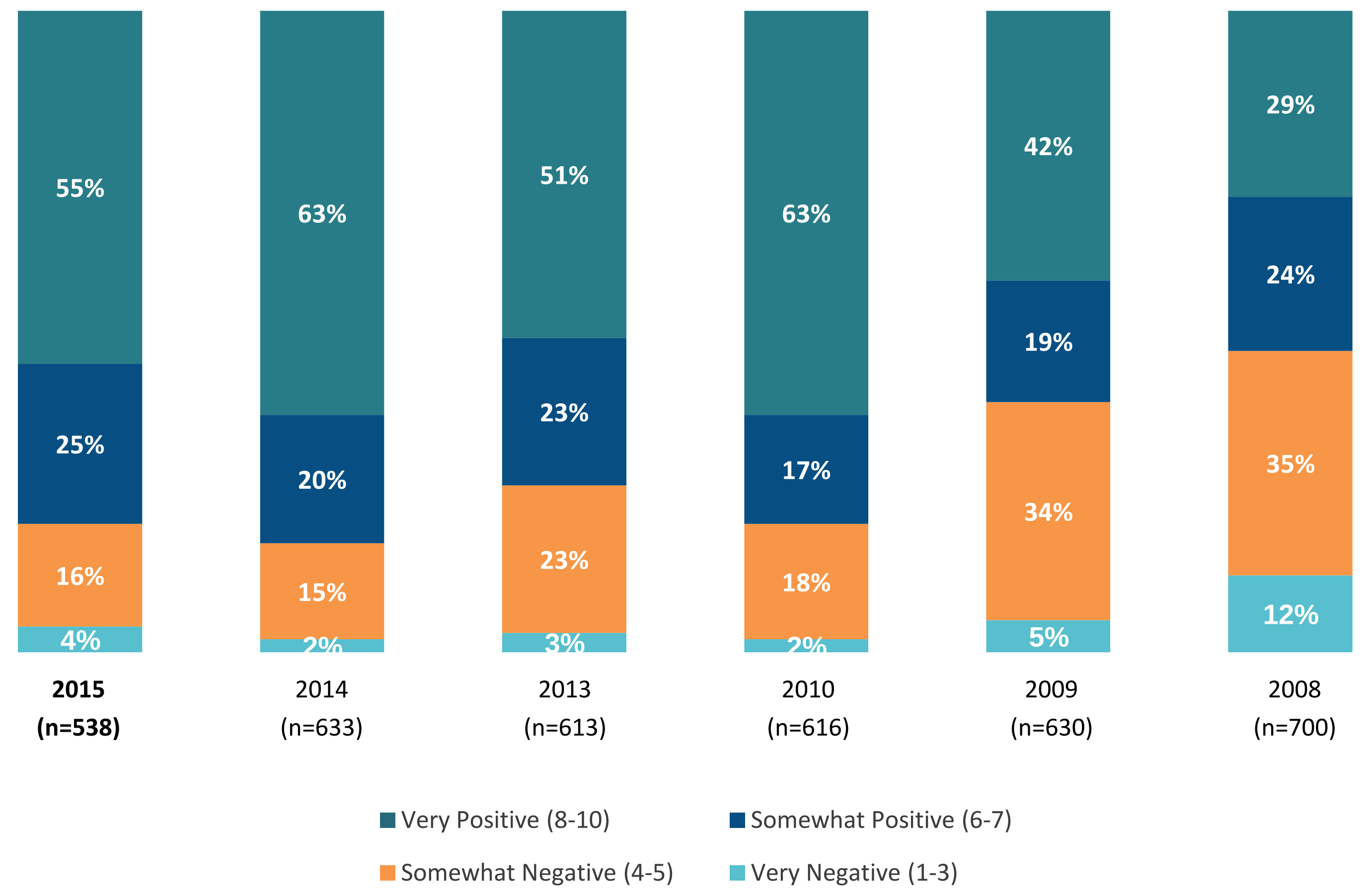
Perceptions of the Fair

Changes at the Fair – Perceptions

- The majority of Fair Goers remain somewhat to very positive about any perceived changes to the Fair.

Respondent Rating of Changes to the Fair This Year

(10-point scale)



Changes at the Fair – Positive

- Fair Goers reported serval positive changes to the Fair this year such as there being more places to sit with shadier areas, a wider variety of food and drink and a general well-run and cleaner feel.

"A lot more shaded sitting areas."

"There were more tables."

"There seemed like more places to sit down."

"More seating and shade, and more rides."

"Variety of food/drink choices."

"Food prices seemed cheaper."

"Variety of food/drink choices."

"More variety of food."

"The upgrade on the buildings and more organized than last year."

"Saw those misting fans."

"Different rides."

"New Rides/Exhibits."

"Better games that are easier to win."

"The Midway – nice, clean and bigger."

"All the shows at Chevy Court."

"Better Chevy Court acts."

"I love it all everything. It looks cleaner."

"Everything was organized."

"Less congested - easier to walk around."

"The transportation was more organized."

"The Park & Ride was great."

"Centro was more organized."

"Deals on tickets and the Special Days."

Changes at the Fair - Negative

- Of those with negative comments, there is a note of an increase in prices, lack of vendors and building changes, and news of the Grandstand.

"Missing vendors."

"Horse barns closed too much for cleaning."

"Tearing down the Grandstand."

"The Grandstand only having 4 concerts was awful."

"Didn't like all the commercial changes in Horticulture building."

"Closure of the horses to the public."

"They got rid of the Grandstand."

"No chickens because of the bird flu."

"Not many Grandstand acts."

Confusion on where to go for public transportation

"Not having the bird exhibit."

"Some prices too high."

"Bad planning on exit after Patti Labelle and the other concerts."

"The games were more expensive."

"Bad planning on exit after the concerts."

"Everything is more expensive."

"The rides are not what we expected."

"No more auto races."

"Less smoking areas."

"Not enough healthy options."

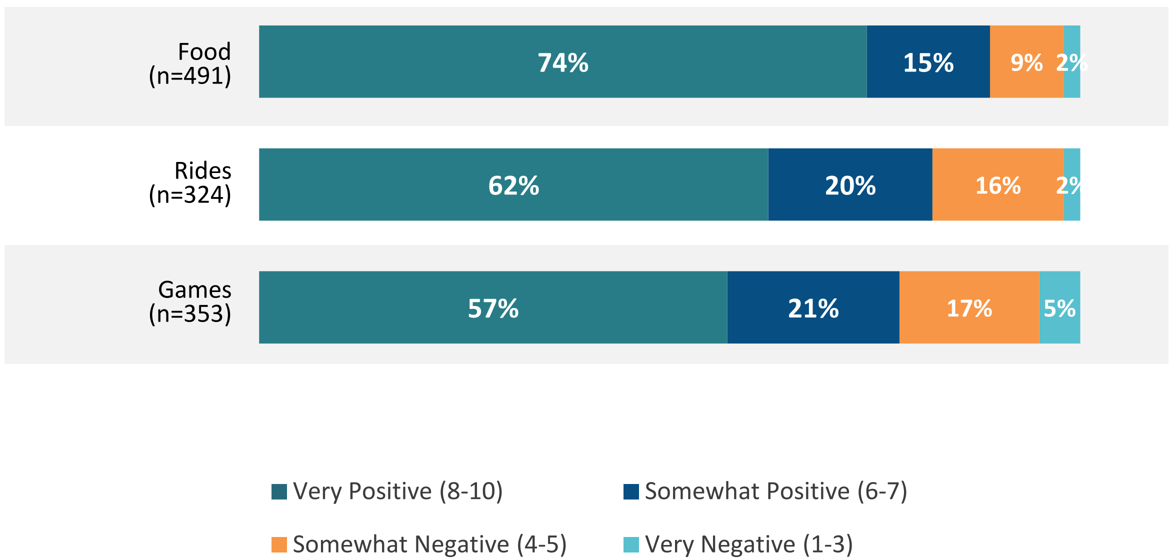
Midway

- Two-thirds rate the Food on the Midway as very positive, with over one-half rating the Rides and Games very high as well.

Note: there was a wording change this year precluding comparison to previous years

The Midway Experience

(10-point scale)



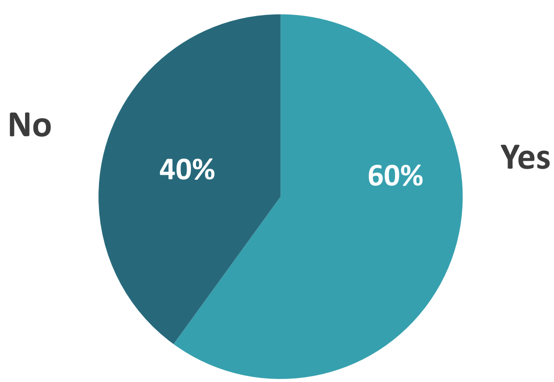
Midway Megapasses

- Over half of respondents were aware of the Wristbands/Megapasses, and of those aware, one-fourth report purchasing one or more – not significantly different from 2014.

Wristband/Megapass Awareness

(Open-End, Single Response)

2015
(n=658)



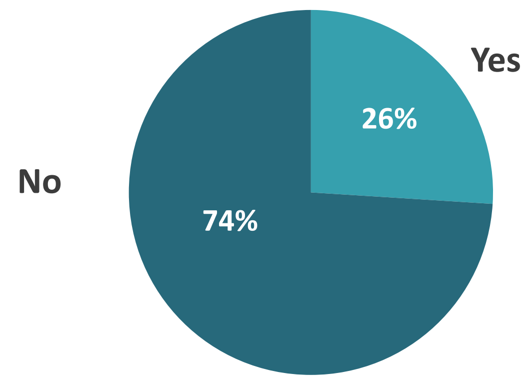
2014
(n=633)

% Aware	63%

Wristband/ Megapass Purchased

(Open-End, Single Response)

2015
(n=398)



2014
(n=398)

% Purchasing	30%

Respondent Suggested Improvements

- About half of Fair Goers could not think of any suggestions or additions.
- More benches/tables/shade & variety of music remain the top two suggested improvements, similar to past years.

Additions/Changes Suggested for the Fair

(Open-End, Multiple Response)

	2015 (n=658)	2014 (n=435)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)
No suggestions	49%	30%	65%	42%	41%	42%
More benches/tables/shade	10%	9%	9%	9%	9%	6%
More/Different/Variety of music/entertainment	7%	10%	7%	29%	12%	9%
Lower prices in general	6%	9%	7%	4%	7%	7%
Restrict Smoking/Drinking	5%	3%	3%	1%	5%	5%
Parking/Shuttles	3%	8%	2%	2%	3%	2%
More educational exhibits/activities	3%	3%	0%	1%	5%	6%
Better maps/directions/schedule	2%	3%	1%	1%	3%	3%
More animals	1%	3%	1%	2%	6%	3%
Other	20%	26%	8%	12%	19%	24%

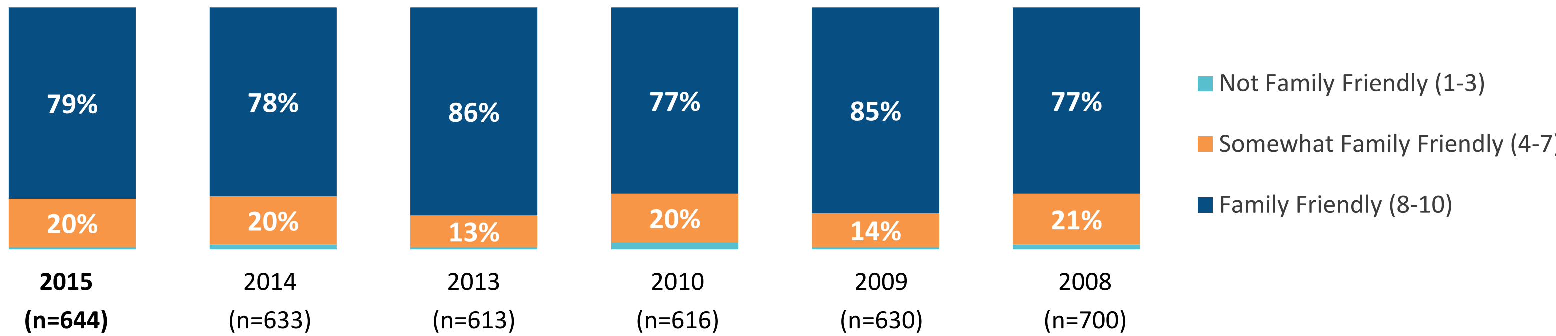
* Other includes a better variety of food, more rides and games and more non-music entertainment.

Family Friendliness

- The Fair continues to be thought of as very Family Friendly.
- When compared to previous years, a majority cite it as consistent with past experiences.

Degree that the Fair is "Family Friendly"

(Aided, Single Response)



How "Family Friendly" the Fair is Compared with Previous Years

(Aided, Single Response)

	2015 (n=658)	2014 (n=572)	2013 (n=613)	2010 (n=616)	2009 (n=623)	2008 (n=700)
More Family Friendly	27%	35%	23%	25%	23%	16%
The Same	70%	60%	74%	70%	73%	78%
Less Family Friendly	3%	5%	3%	5%	4%	6%

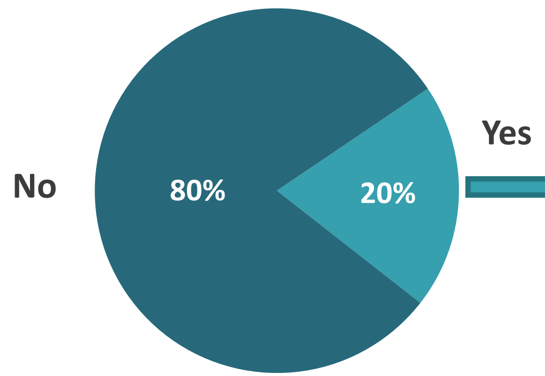
Children in Household

- Roughly one in five Fair Goers have children under the age of 12, and most are likely to bring them along to the Fair.

Those with Children Under the Age of 12

(Unaided, Single Response)

2015
(n=658)

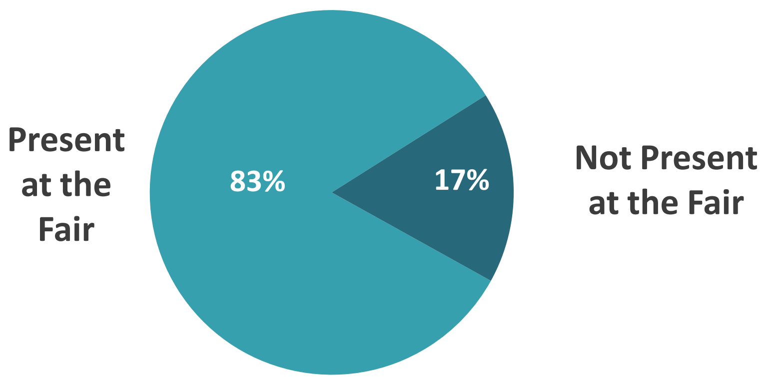


	2014 (n=633)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)	2006 (n=1,030)
% Yes	25%	22%	32%	24%	28%	25%

And Their Presence at the Fair

(Unaided, Single Response)

2015
(n=132)



	2014 (n=161)	2013 (n=137)	2010 (n=195)	2009 (n=151)	2008 (n=196)	2006 (n=257)
% Present at the Fair	77%	72%	85%	80%	82%	79%

In 2015, Fair Goers on average attend with 2-3 other individuals, two in 2014

Attractions

Top Fair Attractions for Attendees

- Food and Beverage remain the biggest draw, with almost three-fourths stating it as what they liked best about the Fair.
- Exhibits & Displays, Chevrolet Court, Agricultural Exhibits, and Arts & Crafts are also very well received.

What do you like about the Fair?

(Aided, Multiple Response)

	2015 (n=658)	2014 (n=633)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)
Food and Beverage	72%	68%	73%	74%	65%	76%
Exhibits and Displays	58%	60%	55%	59%	55%	68%
Chevrolet Court	39%	34%	28%	33%	32%	19%
Agricultural Exhibits	38%	32%	35%	36%	39%	49%
Arts and Crafts	36%	29%	32%	28%	32%	32%
Entertainment in Other Parts of Fair	27%	22%	22%	27%	25%	25%
Midway Games	26%	27%	23%	23%	21%	17%
Midway Rides	25%	27%	23%	27%	22%	21%
Grand Stand Entertainment	7%	10%	18%	17%	15%	16%
Other	6%	9%	10%	16%	7%	16%

Attendance Drivers

- To eat and drink is the top reason given for attending the Fair, followed by spending time with friends and family, attending a concert, and to walk around & browse.

What was the main reason you came / would go to the Fair?

(Open-End, Multiple Response)

	2015 (n=658)	2014 (n=613)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=698)	2006 (n=1,030)
To eat/drink	**23%**	26%	26%	16%	17%	17%	17%
Spend time with friends/family	**17%**	19%	14%	17%	11%	18%	15%
Attend a concert/event	**14%**	16%	15%	26%	18%	12%	13%
Walk around/browse	**13%**	10%	11%	7%	9%	12%	9%
See exhibits	**11%**	7%	9%	9%	9%	9%	6%
Have fun	**10%**	14%	10%	12%	12%	16%	9%
Rides/Games	**9%**	10%	8%	5%	5%	3%	6%
Tradition/Habit	**7%**	4%	2%	2%	3%	2%	2%
Special Day/Discount	**6%**	5%	2%	1%	2%	2%	5%
See animals	**4%**	4%	5%	3%	7%	6%	5%
Shopping	**2%**	1%	2%	2%	1%	2%	2%
Entertainment	**2%**	1%	2%	2%	2%	1%	2%
Vacation/day off	**2%**	1%	1%	1%	1%	3%	5%
No specific reason	**1%**	2%	7%	3%	1%	4%	3%
See what's new	**1%**	2%	4%	2%	1%	2%	3%
Other	**7%**	5%	8%	4%	12%	1%	3%

Agricultural Exhibits

- The Butter/Cheese Sculptures and Dairy Products Building continue to be the most popular agricultural exhibits.
- The Horticultural Building gained popularity this year, as well as a number of other exhibits.

Fair Goers are more likely to visit the Butter and Cheese Sculpture, the Dairy Products Building, the Horticulture Building and the Maple Center on their next visit.

Agricultural Exhibits Visited

(Aided, Multiple Response)

	2015 (n=605)	2014 (n=633)	2013 (n=613)	2010 (n=616)	2009 (n=630)
Butter and Cheese Sculpture	72%	63%	66%	61%	69%
Diary Products Building	63%	61%	65%	66%	69%
Horticulture Building	55%	44%	42%	48%	53%
Agricultural and Livestock Competition	38%	34%	28%	32%	37%
New York Maple Center	38%	28%	31%	31%	34%
Dairy Cow Live Birthing Center	33%	22%	18%	--	--
Taste New York Program	33%	--	--	--	--
Agricultural and Carriage Museum	31%	25%	16%	22%	21%
Petting Zoo	30%	22%	15%	21%	19%
NYS International Horse Show	26%	16%	16%	24%	31%
Equine Avenue	26%	--	--	--	--
Antique Tractor Display	18%	16%	10%	18%	17%
Wool Center	18%	15%	10%	14%	19%
The Lakes of NY Exhibit	15%	--	--	--	--
NY Christmas Tree Growers Association	14%	--	--	--	--

Taste of New York Program

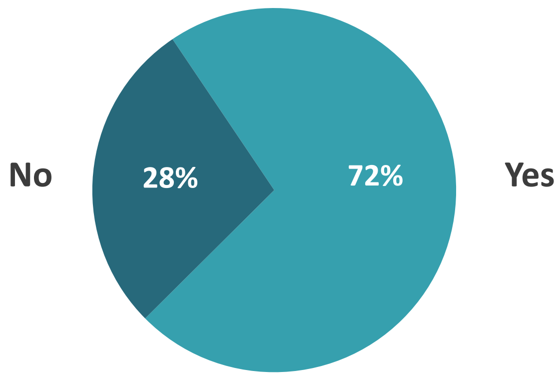
- Awareness of the Taste of New York Program is close to three-quarters.
- One in four of those aware report that they did make a purchase; up from last year.

Awareness of Taste of New York Program

(Open-End, Single Response)

2015

(n=658)



	2014 (n= 633)	2013 (n= 613)
% Aware	63%	75%

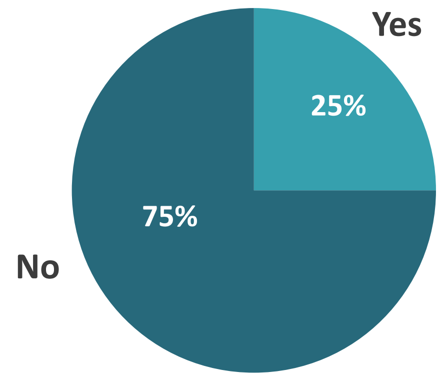
Average Purchase Price (Open-End, Single Response)	Mean
2015	**$34**
2014	$14

Purchases at the Taste of New York Program

(Open-End, Single Response)

2015

(n=476)



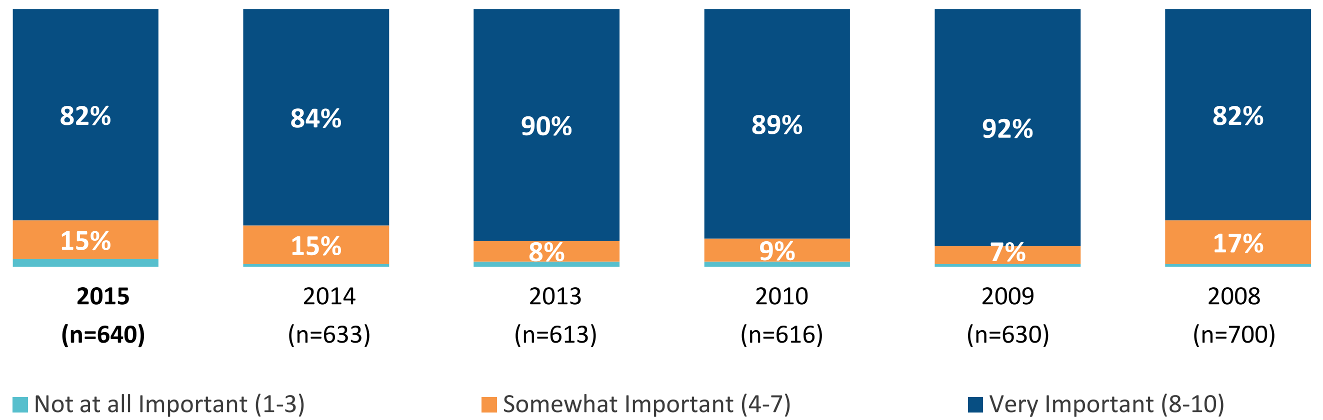
	2014 (n= 401)	2013 (n= 202)
% Purchasing	16%	20%

Taste of New York Program

- Promoting NYS Products remains very important to Fair Goers.
- As with previous years, one-tenth of Fair Goers participated in the Trail Contest.

Importance of Promoting NYS Products

(10-point scale)

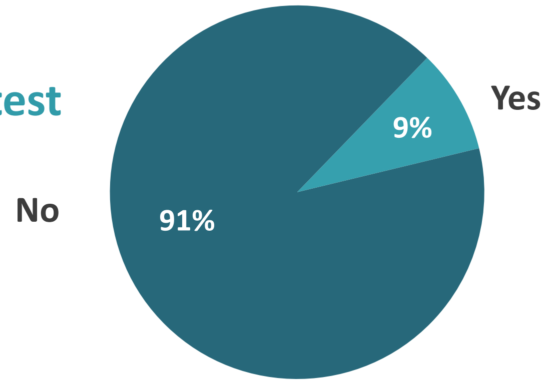


Participation in the Trail Contest

(Open-End, Single Response)

2015

(n=476)



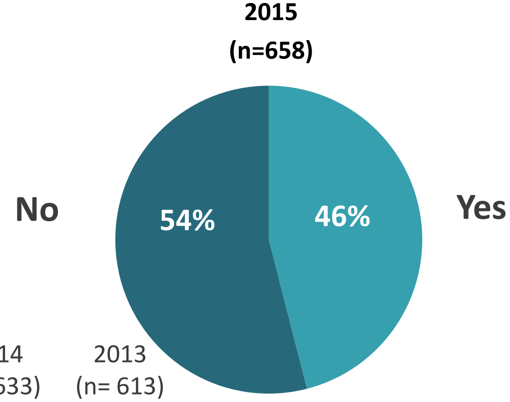
	2014 (n= 401)	2013 (n= 202)
% Participated	9%	7%

Dairy Cow Live Birthing Center

- Awareness of the Dairy Cow Live Birthing Center has increased slightly from previous years.
- Those who attend the Center continue to rate it as a positive experience.

Awareness of Dairy Cow Live Birthing Center

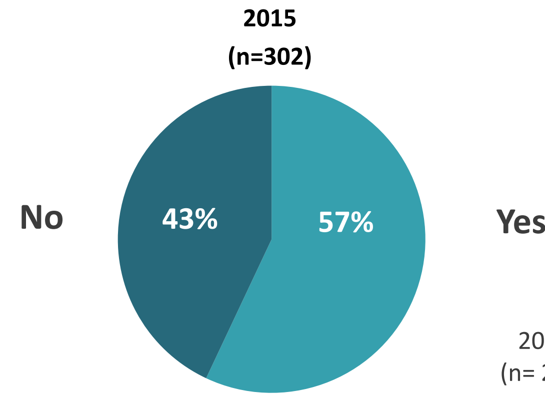
(Open-End, Single Response)



	2014 (n= 633)	2013 (n= 613)
% Aware	42%	43%

Attendance at the Dairy Cow Live Birthing Center

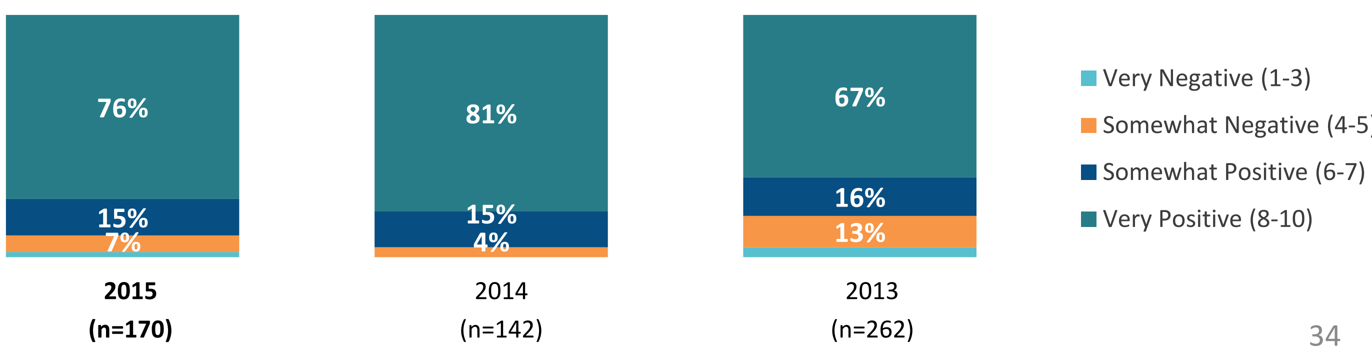
(Open-End, Single Response)



	2014 (n= 230)	2013 (n= 202)
% Attending	60%	61%

Rating the Experience

(10-Point Scale)



KS&R Data to Knowledge

State Fair History Exhibit

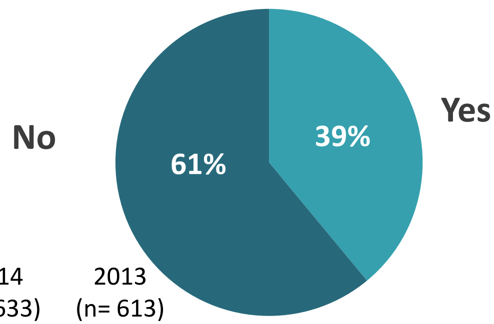
- 39% are aware of the State Fair History Exhibit, with more than two-thirds of those aware following through and attending the exhibit.
- A majority of those who attended ranked it as a very positive experience.

Awareness of State Fair History Exhibit

(Open-End, Single Response)

2015

(n=658)



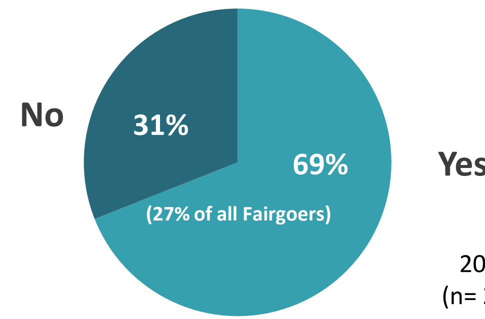
	2014 (n= 633)	2013 (n= 613)
% Aware	36%	33%

Attendance at the State Fair History Exhibit

(Open-End, Single Response)

2015

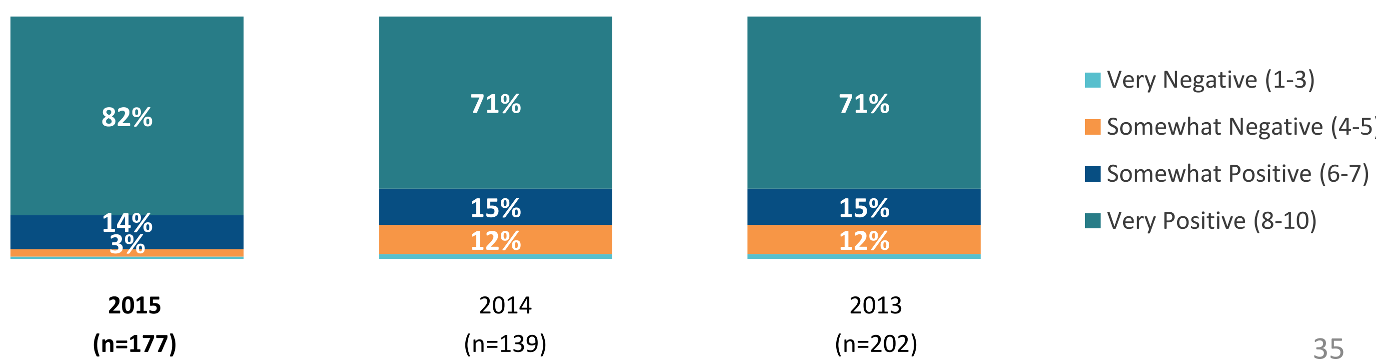
(n=258)



	2014 (n= 230)	2013 (n= 202)
% Attending	60%	61%
% All Fairgoers	22%	20%

Rating the Experience

(10-Point Scale)



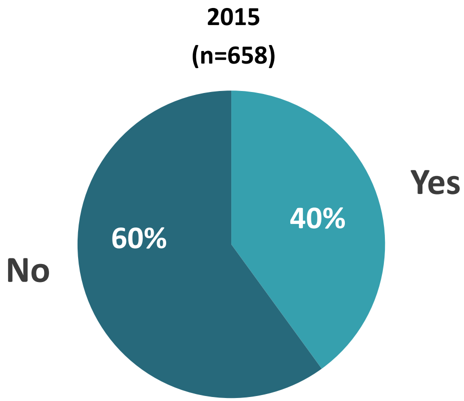
KS&R Data to Knowledge

Equine Avenue Demonstration

- 40% were aware of the Equine Avenue, again with almost three-quarters following through and attending the exhibit.
- Almost all cited that it was a very positive experience.

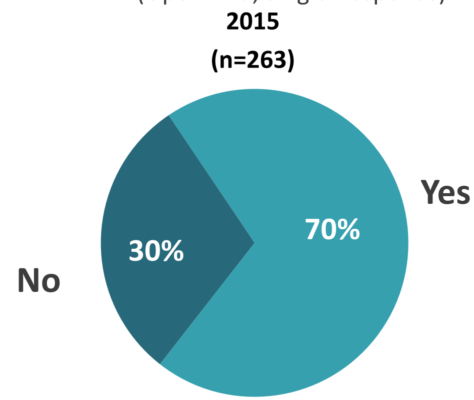
Awareness of Equine Avenue Demonstration

(Open-End, Single Response)



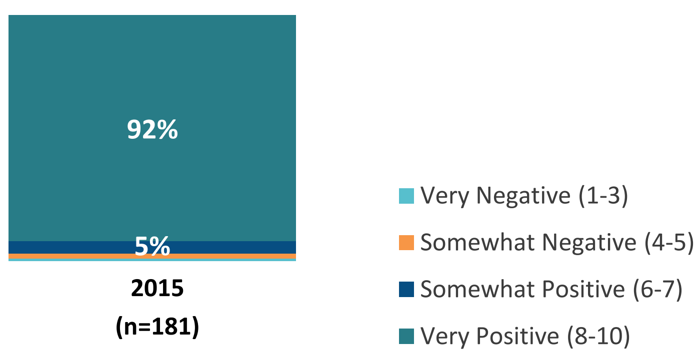
Attendance at the Equine Avenue Demonstration

(Open-End, Single Response)



Rating the Experience

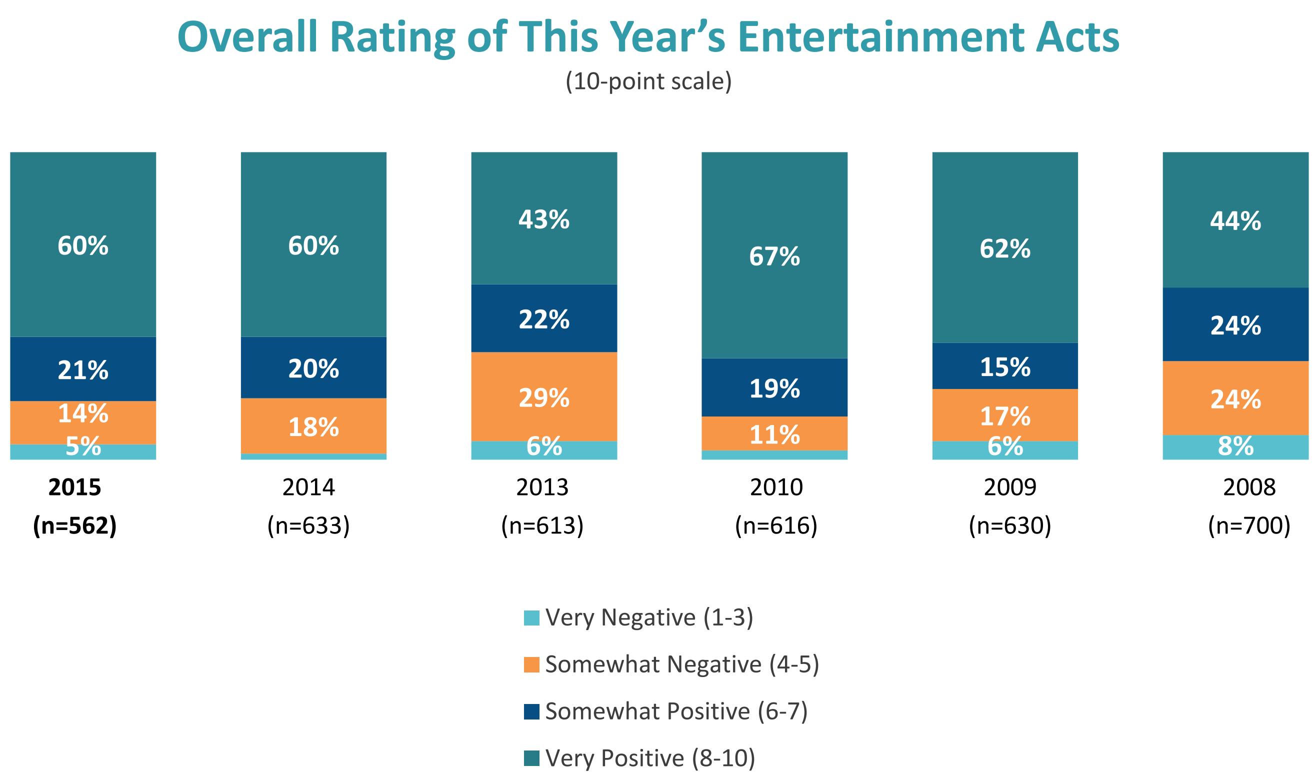
(10-Point Scale)



Entertainment

Entertainment at the Fair

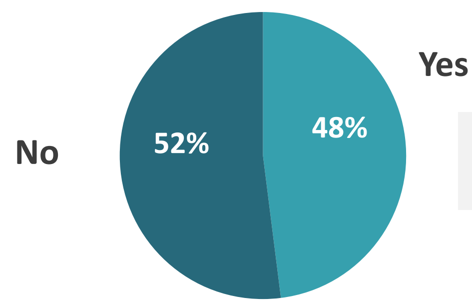
- Fair Goers remain consistently positive about the entertainment acts at the Fair.
- 2013 and 2008 were less positive years.



Chevy Court Concert Attendance/Ratings

- About one-half of Fair Goers reported attending Chevy Court concert this year, up from previous years.
- Most rate the acts positive, with close to one-half saying that it was the main reason that they came that day.

Attendance of Concerts at Chevy Court



	2014 (n=633)	2013 (n=613)	2010 (n=616)
Percent Who Attended	40%	22%	32%

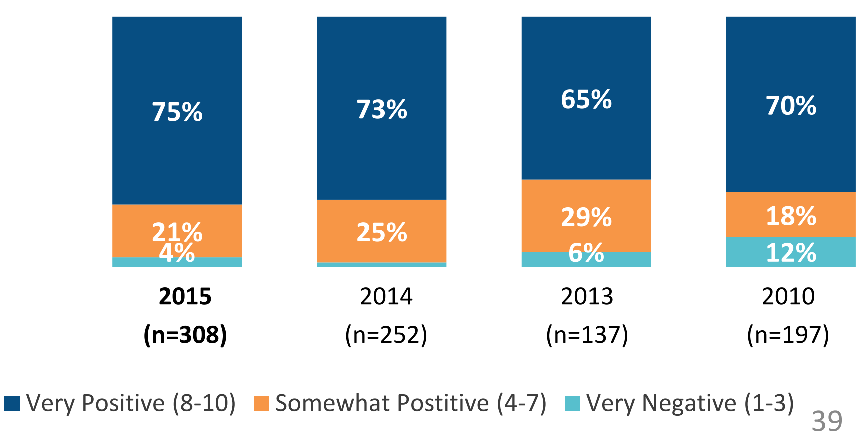
Degree that Attending Concert at Chevy Court was a Driver for Attendance

(10-point scale)

	2015 (n=310)	2014 (n=291)	2013 (n=137)	2010 (n=197)
Main Reason (8-10)	47%	50%	32%	44%
Somewhat of a Reason (4-7)	16%	23%	42%	17%
Not a Reason (1-3)	37%	19%	26%	39%

Rating of This Year's Chevy Court Entertainment Acts

(10-point scale)

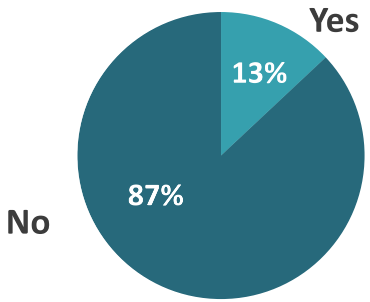


Grandstand Concert Attendance/Ratings

- Those who attended a Grandstand event ranked the Overall experience as very positive.

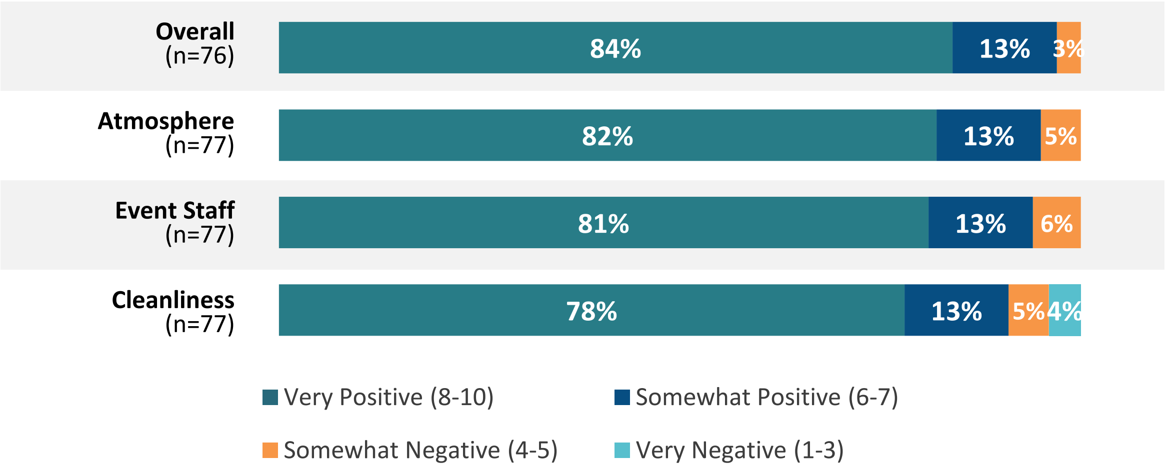
Note: given the different strategy for the Grandstand bookings, attendance compared to previous years is not as relevant (and last year an oversample of concert goers was procured)

Attendance of Concert at the Grandstand



Ranking on Different Aspects of the Grandstand

(10-point scale)



PinckneyHugoGroup

Most Popular Concert Genres

- Country and Rock/Alternative remain the most popular genres, although Fair Goers request a wide variety of acts with no single type dominating.

Types of Concerts and/or Performers Desired at the Fair

(Aided, Multiple Response)

	2015 (n=656)	2014 (n=633)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)	2006 (n=1,030)
Country	32%	26%	30%	35%	31%	17%	22%
Rock/Alternative	26%	25%	17%	22%	17%	9%	11%
All/Like Variety	22%	32%	24%	26%	19%	10%	9%
Oldies	20%	19%	18%	29%	31%	20%	26%
Rap/R&B	18%	22%	14%	17%	10%	6%	10%
Blues/Jazz	16%	13%	12%	15%	11%	7%	2%
Comedy	15%	17%	14%	19%	12%	7%	2%
Pop/Teens/Tweens	15%	11%	10%	14%	8%	7%	4%
Ethnic/Cultural	7%	6%	5%	6%	4%	3%	2%
No Opinion	5%	8%	9%	6%	9%	9%	12%
Other	8%	6%	7%	11%	9%	7%	7%

KS&R Data to Knowledge

Advertising and Media

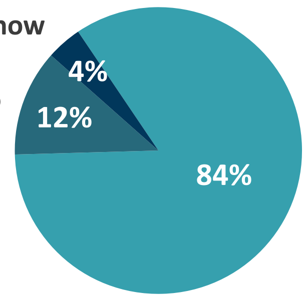
Advertising Recall

- Advertising recall is up this year, similar to 2013 and previous years.
- Television remains the predominant format, followed by Radio and then Newspapers

Advertising Awareness (past 3 months)

19% recalled "The Great New York State Fair" as the slogan vs. 12% in 2014

2015 (n=658)



Yes	2014 (n= 633)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)	2006 (n=1030)
% Aware	78%	85%	86%	85%	82%	86%

Media cited

(Aided, Multiple Response)

	2015 (n=553)	2014 (n=493)	2013 (n=613)	2010 (n=529)	2009 (n=531)	2008 (n=700)	2006 (n=1030)
Television	74%	74%	79%	76%	77%	78%	76%
Radio	54%	52%	60%	64%	62%	55%	58%
Newspapers	36%	38%	43%	47%	46%	54%	58%
Facebook	20%	--	--	--	--	--	--
Billboard	17%	11%	12%	23%	19%	12%	18%
Posters in stores where Fair tickets are sold	15%	14%	16%	17%	15%	13%	26%
Internet	11%	17%	10%	14%	11%	7%	7%
Fair Guide	7%	7%	6%	11%	7%	7%	9%
Other	4%	5%	3%	3%	4%	4%	6%

Websites Visited

- Facebook remains most popular website, followed by search engines, and local news.
- Talk radio/AM and B104.7 are the most popular radio stations this year, followed by 93Q and online stations.

Websites Visited

(Multiple Response)

	2015 (n=658)	2014 (n=613)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)
Facebook	43%	51%	48%	49%	11%	14%
Google	16%	20%	18%	17%	6%	15%
Local News Websites	7%	6%	12%	11%	2%	3%
Yahoo	7%	13%	12%	19%	9%	10%
Syracuse.com	6%	9%	9%	7%	4%	4%
Twitter	5%	7%	10%	--	--	--
Online Shopping	3%	--	--	--	--	--
MSN	3%	6%	8%	2%	2%	2%
Instagram	3%	3%	4%	--	--	--
YouTube	2%	6%	5%	5%	--	--
Other	15%	24%	24%	30%	25%	32%
Do Not Regularly Visit Any	27%	5%	34%	40%	31%	29%

Radio Stations

(Multiple Response)

	2015 (n=658)	2014 (n=633)	2013 (n=613)
Talk Radio/AM	13%	9%	--
B 104.7	12%	12%	16%
93Q	11%	23%	21%
Online Stations	10%	6%	--
Hot 107.9	10%	20%	17%
Oldies	7%	4%	--
NPR	5%	3%	3%
95X	4%	9%	8%
KRock	4%	8%	6%
WSEN 92.1	3%	--	--
Y94 FM	3%	5%	9%
TK99	2%	3%	--
Wolf 105.1	2%	2%	--
Other	16%	20%	3%
Don’t Listen to the radio	32%	6%	--

Newspaper Readership

- Readership of the Post Standard is leveling off at less than one-half of Fair Goers.

Newspaper(s) read on a daily basis

(Open-End, Multiple Response)

	2015 (n=658)	2014 (n=613)	2013 (n=613)	2010 (n=616)	2009 (n=630)	2008 (n=700)	2006 (n=999)
Post Standard	43%	45%	48%	43%	49%	56%	68%
Other*	36%	19%	27%	51%	33%	29%	22%
None	41%	36%	35%	26%	21%	15%	7%

* Other includes the Rochester Democrat & Chronicle, New York Times, USA Today, Utica Observer Dispatch, the Ithaca Journal, and The Auburn Citizen.