

**RFP #0231:** MARKETING, ADVERTISING, AND PUBLIC RELATIONS  
SERVICES FOR THE NEW YORK STATE FAIR AND FAIRGROUNDS

Exhibit #2: Summary  
of 2019 Survey Results



## ① Where do Fairgoers come from when attending?

- In 2019, 52% came from three counties: Onondaga, Oswego and Oneida.
  - Onondaga County accounted for 38% of visitors.
  - Nearly 4 in 10 (39%) come from outside of the 7-county Syracuse DMA.
  - Those attending the Fair from outside of the Syracuse DMA jumped from 2018 to 2019 (increasing from 33% to 39%).
  - Monroe County witnessed an increase from 4% to 6% since last year. There was growth in several WNY counties including Monroe, Wayne, and Ontario.
- Over 1 in 10 (14%) of visitors traveled over 200 round trip miles to come to the Fair in 2019. This was the highest this figure has been over the past 4 years (since 2016). This represents continued growth from attendees outside of the area.



## ② What is the Fairgoer profile, demographics, and lifestyle characteristics?



- The largest age group consists of those 26 to 60 (65%)<sup>1</sup>. Within that age range, the most common group of Fairgoers was those aged 45 to 60 (30%).
- Household incomes were evenly distributed. Most commonly Fairgoer households earned \$50K to \$75K annually. This matches median income levels for Upstate New York.
- 87% classify themselves as white.
  - Ethnicity figures were very similar to 2018 (4% Black or African American and 2% Hispanic or Latino).
  - Black, Hispanic, and Asian attendees to the Fair were significantly more likely to be first-time Fairgoers. Meaning the 2019 Fair performed well by drawing in these first-time audiences for the second consecutive year. This was a finding in 2018 as well.
- 6% self reported as LGBTQ (less than 1% increase from 2018).

<sup>1</sup> Age quotas were not in place for the 2018 or 2019 survey. Ages are monitored and targeted for ZIP Code and email collection.



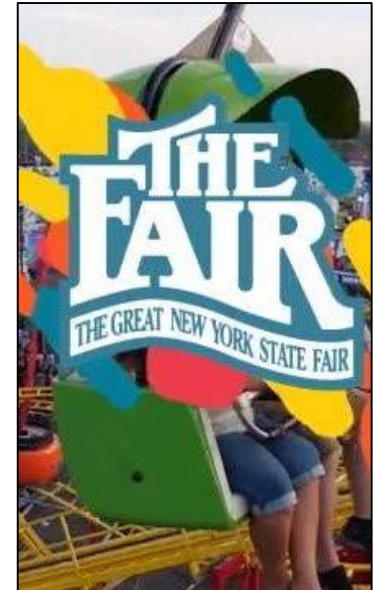
### ③ How do visitors get to the Fair and how is this experience rated?

- The majority of Fairgoers drove from their residence (86%). A distant second was traveling to the Fair from a hotel (6%). These figures were similar to 2018.
- Just under 3 in 4 (75%) stated they drove to the Fair and parked at a Fair-sponsored lot. Approximately 1 in 5 (18%) parked at a non-Fair lot and took the Centro Park-N-Ride bus. Usage of Centro buses increased from 2018.
  - Those who drove and parked at a Fair lot were more satisfied with their experience getting to the Fair (74% rated it an 8 or higher on the 1 to 10 scale). This was higher than those who parked at a non-Fair lot and took the bus (61% with an 8 or higher).
  - Parking at the Fair lots was described as easy (15%) and good (9%).
  - Explanations to describe the lower rated experiences at the non-Fair lot using the Centro Park-N-Ride included did not like the drop off location (22%) (i.e., Gate 10) and long wait (11%) (i.e., lines on-site or traffic on the highway).



## ④ What role does media play in informing visitors about the Fair?

- Nearly 9 in 10 (87%) recall seeing or hearing advertising for the Great New York State Fair in the past 3 months. The past 4 years has averaged a 90% awareness (up from 84% in 2015 and 78% in 2014).
- Television (68%), radio (51%), and social media (50%) were the 3 most common sources of awareness, nearly identical to 2018 numbers.
  - Social media was the top awareness source for those under 45.
  - Television as a source of awareness was much higher among those aged 45 or older.
- Similar to 2018, Facebook was by far the most influential social medium, cited by 92% of those respondents.
  - Instagram, Snapchat, and Twitter were all much more likely to be mentioned as most influential sources among younger audiences aged 25 or less. However, they still paled in comparison to Facebook.



## ⑤ Why do visitors attend the Fair and what are their attendance habits?

- The main reasons for attending the Fair in 2019 varied:
  - To eat/drink (17%)
  - Attending a concert or event (14%)
  - Spend time with family and friends (14%)
  - Tradition/habit (10%)
- 83% of attendees come to the Fair at least once a year with nearly 50% coming more than once per year.
- About 1 in 10 were new to the Fair in 2019 (7%). This was 8% in 2018.
- Over 3 in 4 (79%) Fairgoers came with family, similar to 2018.
- 40% watched a Chevy Chase concert at the Fair in 2019, which decreased slightly from 2018 (at 46%).
  - Lindsay Stirling (18%), Bad Company (17%), and Blood, Sweat & Tears (16%) were the 3 concerts respondents reported attending.
  - 46% (8 to 10 rating) stated it was a main reason for going. This was down from the past 2 years.



## ⑥ What are visitors' perceptions of their overall Fair experience?



- Awareness of new changes to the Fair varied.
  - 54% mentioned improvements to seating areas.
  - 37% mentioned improved parking and bus service.
  - 37% mentioned availability of maps.
- Food and beverages (88%), agricultural exhibits (68%), and musical concerts at Chevy Court and other areas (66%) were the 3 most commonly liked experiences at the Fair.
- 82% of respondents rate the Fair as “very family friendly” (8 to 10 on a 1 to 10 scale) (nearly identical to 2018).
- 74% rated the Fair as affordable (6 to 10 on a 1 to 10 scale). This was a slight increase from 2018 at 70%.
- 89% of respondents are likely to attend the Fair next year, including 82% who are “very likely”.



## ⑦ How much do visitors spend at the Fair?

- 86% purchased food or drinks, 54% purchased general merchandise, 46% spent money on games or rides, and 35% spent money on other items (not including admission or parking).
- The average spent was \$66 per person, decline of \$7 since 2018 and \$21 since 2017.
  - 39% of respondents spent \$50 or more per person during their visit, equal to 2018.
  - Fairgoers did find the 2019 Fair more affordable than 2018 which could have resulted in more cost savings from attendees.
  - Per person, Fairgoers spent an average of \$24 on food or beverage, \$21 on general merchandise, \$11 on rides or games on the midway, and \$10 on other items (not including admission or parking).
  - On average those 45 and older spent more on merchandise (\$25) than younger audiences. Those who came with friends spent more in total (\$79). Those who watched a Chevy Court concert also spent more in total (\$74).





## ⑧ What is the awareness and impact of discount admission days?



- Nearly half (46%) of Fairgoers reported discount admission days affecting their attendance. This was the highest percent who were influenced over the past 5 years (21% stated it affected attendance in 2015, 19% in 2016, 27% in 2017, 41% in 2018).
  - Awareness of discount admission days is lowest among those aged 18 to 25.
  - Regular Fairgoers and Onondaga County residents are more likely to be affected by these promotions.
- Dollar day (47%), senior days (37%), and \$3 Thursdays are the top 3 most influential discount admission days.