



Marketing and Sales Manager Project
November 26, 2005

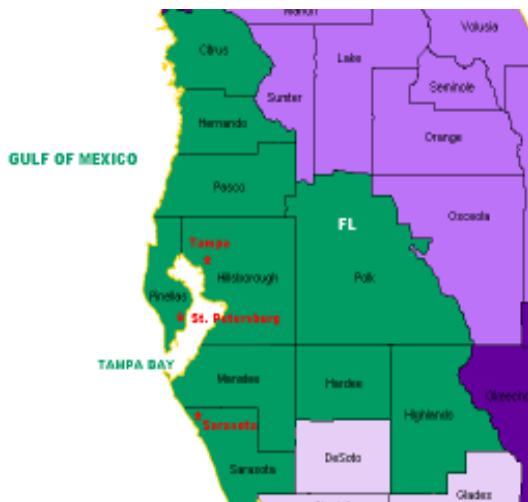


CAMPAIGN PURPOSE

Create two grass roots programs to reach women aged 25 – 49 within the Tampa Designated Market Area for the purpose of increasing show attendance. Of greater importance is reaching women of this age group with young to tween aged children and accelerating the family desire to attend The Greatest Show On Earth®.

DEFINITION OF MARKET, ANALYSIS AND COMPARISON

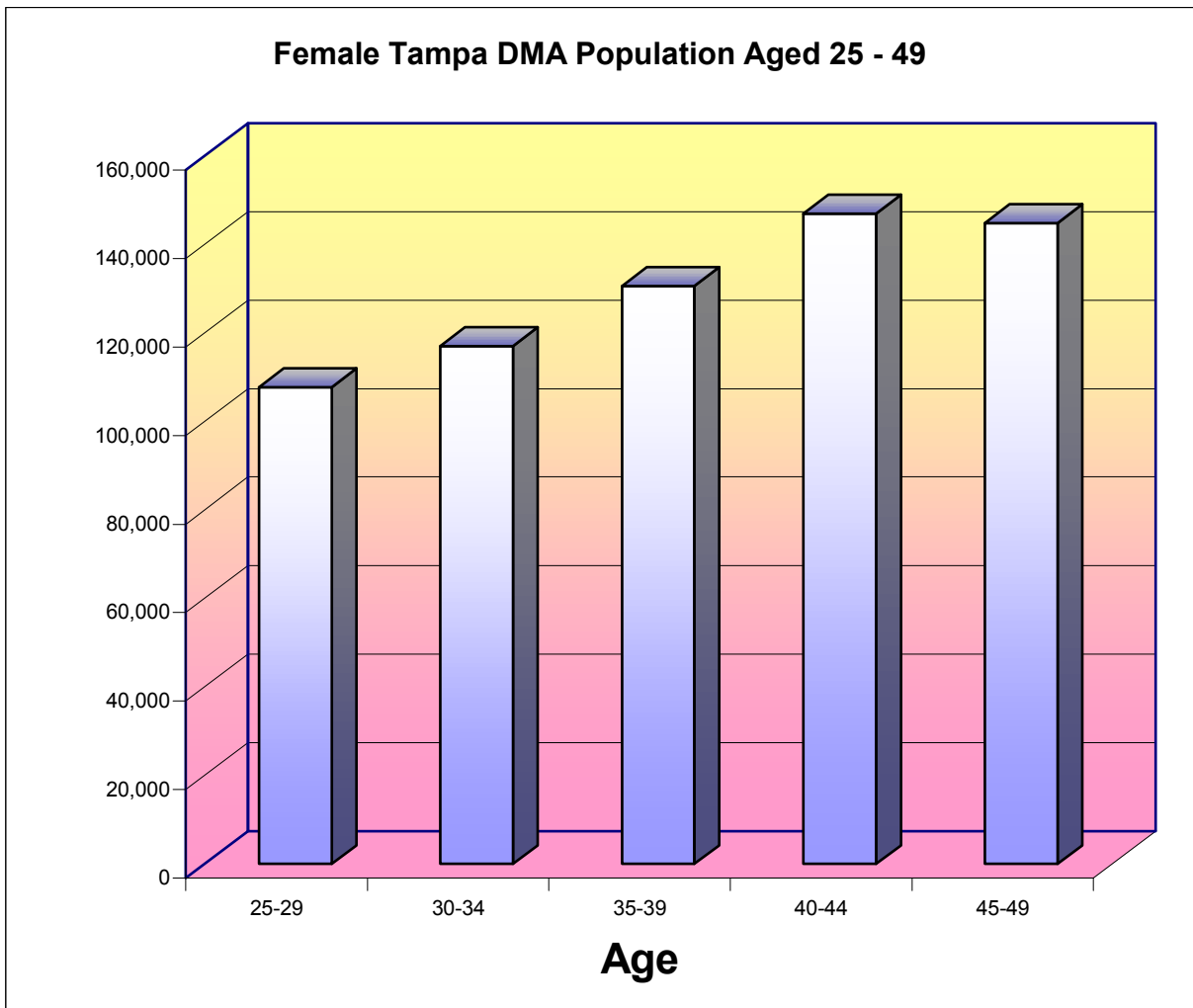
The Tampa DMA consists of Citrus, Hardee, Hernando, Highlands, Hillsborough, Manatee, Pasco, Pinellas, Polk and Sarasota counties. Data for market definitions and comparisons was taken from available data on www.myflorida.com and extrapolations from the 2000 US Census Data. Additional relevant market data provided that was not directly requested is children up to age 17 who are also in the Tampa DMA, since ultimately the desire of children to see the Circus will drive ticket sales regardless of socio-economic variables. According to the Neilsen Media September 2005 DMA rankings, The Tampa DMA gained one point over last year and ranks 12th in the nation. For the purpose of this report this market will be compared with the Miami DMA, which is the next close comparison within the state of Florida, ranking 17th in the nation. The Miami DMA consists of Miami-Dade, Broward and Monroe counties.



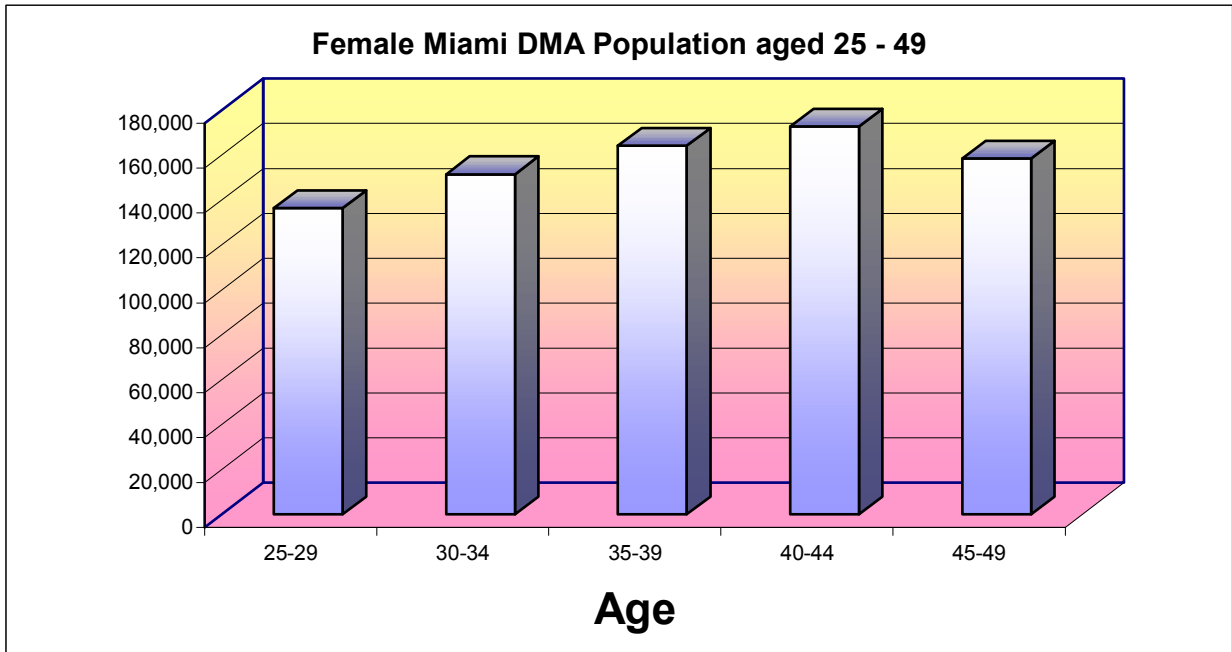
Market observations indicate a peak in the 35 to 45 age segments within both markets; mirroring a similar peak in the 5 to 14 age segments for children in both markets. A surprising discernable difference between both markets is census data versus DMA data. Although Tampa ranks 12th in the nation with a little more than 1.7 million television viewers, the market has less women and less children than 17th ranked Miami market with a little more than 1.5 million television viewers. This indicates that although there is a marked population increase in the Miami market, either these people do not watch or do not have access to television. Print, Radio, Outdoor and Grass roots campaigns can have greater impact in the Miami market since the population has less potential to be reached through television viewing. A further notable difference is the

density of the Miami market when compared to the Tampa market encompassing 10 counties in a much broader geographic region. Grass roots campaigns hold the potential to reach a more rural population within the Tampa market. Psychographic data suggests that rural communities tend to be more family oriented, tend to travel less through populated areas where profitable outdoor advertising impressions are generated and tend to spend more time participating in community events or basic daily activities such as food shopping.

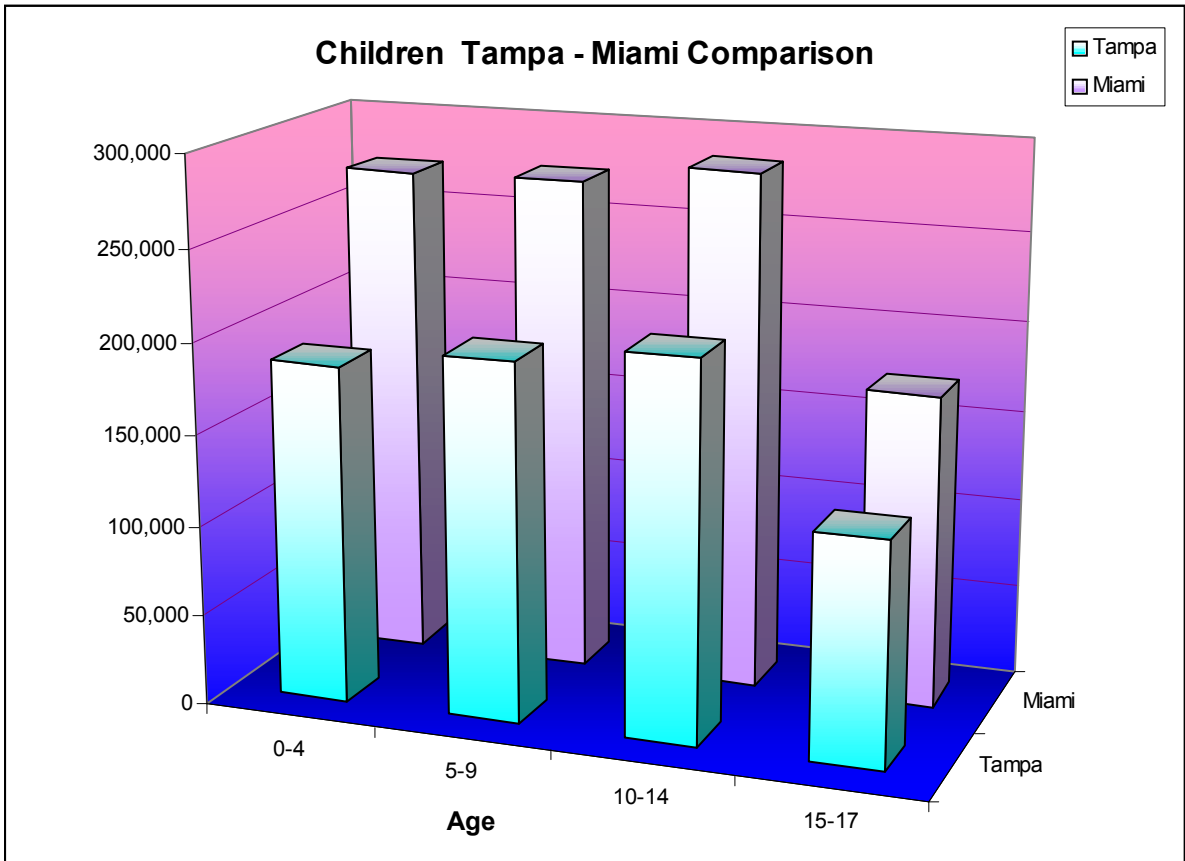
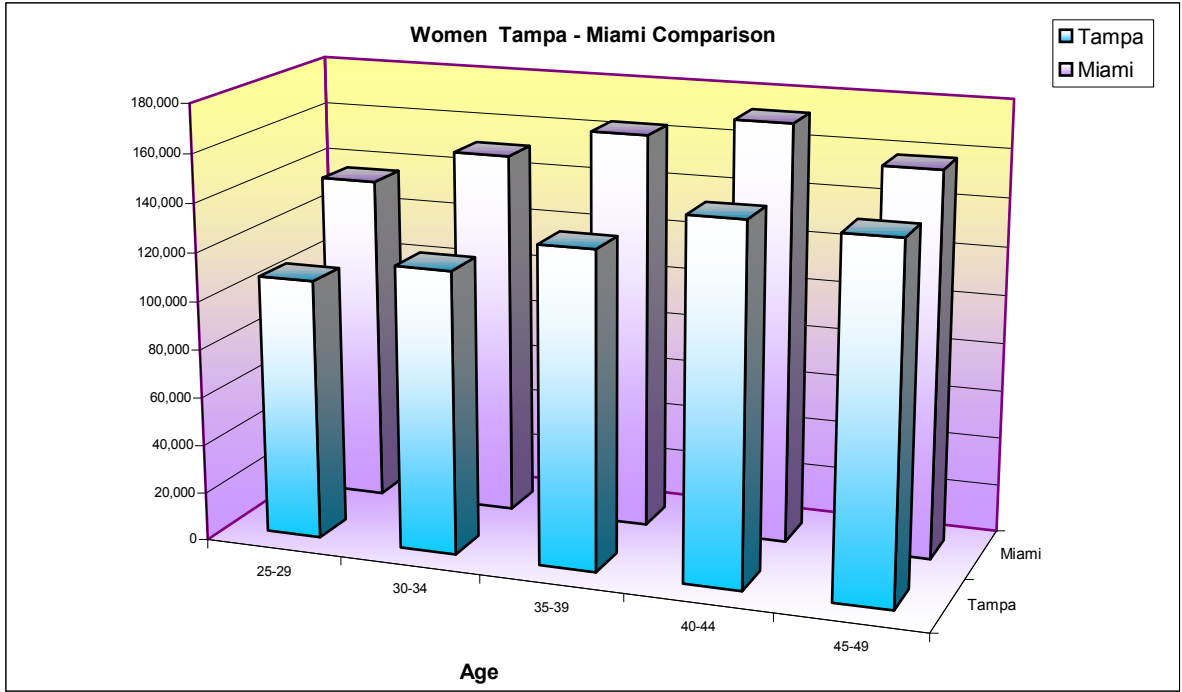
Following each graphical representation of each market and comparison is the data table with population breakdowns for further data analysis.



| Women – Tampa DMA | | | | | | | | |
|--------------------------|-------------|------------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| County | Race | Hispanic origin | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | |
| Citrus | All Races | Both | 2,003 | 2,490 | 3,234 | 3,835 | 4,190 | |
| Hardee | All Races | Both | 820 | 762 | 715 | 790 | 741 | |
| Hernando | All Races | Both | 2,767 | 3,192 | 3,860 | 4,484 | 4,870 | |
| Highlands | All Races | Both | 1,808 | 1,878 | 2,132 | 2,485 | 2,556 | |
| Hillsborough | All Races | Both | 38,637 | 39,871 | 41,934 | 44,797 | 41,329 | |
| Manatee | All Races | Both | 7,415 | 8,183 | 8,930 | 10,136 | 10,216 | |
| Pasco | All Races | Both | 8,833 | 10,112 | 12,043 | 13,392 | 13,208 | |
| Pinellas | All Races | Both | 24,026 | 27,366 | 31,157 | 37,071 | 37,448 | |
| Polk | All Races | Both | 14,929 | 15,553 | 17,058 | 18,435 | 17,910 | |
| Sarasota | All Races | Both | 6,516 | 7,684 | 9,543 | 11,563 | 12,333 | Total Market |
| | | | 107,754 | 117,091 | 130,606 | 146,988 | 144,801 | 647,240 |



| Women – Miami DMA | | | | | | | | |
|--------------------------|-------------|------------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| County | Race | Hispanic origin | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | |
| Broward | All Races | Both | 54,080 | 62,112 | 69,461 | 72,014 | 67,301 | |
| Miami-Dade | All Races | Both | 80,260 | 86,788 | 91,649 | 97,198 | 87,392 | |
| Monroe | All Races | Both | 1,853 | 2,300 | 2,765 | 3,322 | 3,596 | Total Market |
| | | | 136,193 | 151,200 | 163,875 | 172,534 | 158,289 | 782,091 |



| Children – Tampa DMA | | | | | | | |
|-----------------------------|-------------|------------------------|------------|------------|--------------|--------------|--------------|
| County | Race | Hispanic origin | 0-4 | 5-9 | 10-14 | 15-17 | |
| Citrus | All Races | Both | 4,624 | 5,518 | 6,618 | 4,449 | |
| Hardee | All Races | Both | 2,127 | 1,880 | 1,934 | 1,248 | |
| Hernando | All Races | Both | 6,432 | 7,651 | 8,391 | 5,154 | |
| Highlands | All Races | Both | 4,480 | 4,725 | 4,949 | 3,113 | |
| Hillsborough | All Races | Both | 37,232 | 39,064 | 38,560 | 22,141 | |
| Manatee | All Races | Both | 16,369 | 17,020 | 16,996 | 10,252 | |
| Pasco | All Races | Both | 19,878 | 23,501 | 24,702 | 13,594 | |
| Pinellas | All Races | Both | 46,917 | 48,301 | 52,457 | 31,805 | |
| Polk | All Races | Both | 34,636 | 34,392 | 35,854 | 21,371 | |
| Sarasota | All Races | Both | 13,999 | 15,863 | 17,970 | 10,397 | Total Market |
| | | | 186,694 | 197,915 | 208,431 | 123,524 | 716,564 |

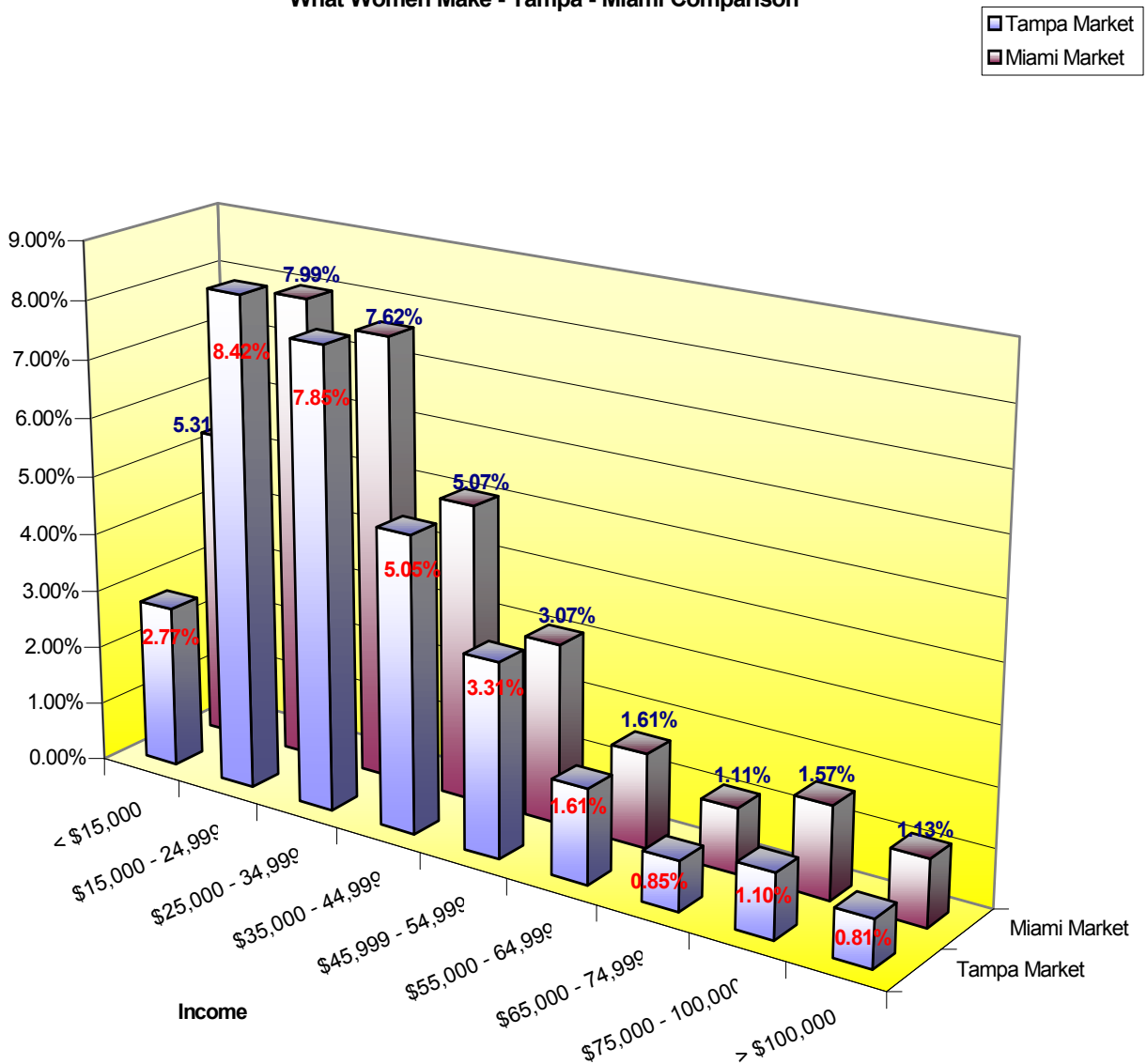
Employment data available through the 2000 US Census was not entirely conclusive for each market area and not drillable down to specific age ranges. However, for the purposes of this discussion, statistical guidelines ensure that percentage comparisons will hold true with slight variance for the entire population. Included are the data tables used with the census data, which was available for further review and analysis.

Women predominantly tend to work within their county and state of residence, with the Tampa market showing a slightly higher percentage of women (13.98%) who commute outside their county for employment and neither market showing even 1% of women who work outside the state entirely.

| Where Women Work Tampa - Miami Comparison | | | | |
|--|-------------------------------------|--|---|--|
| Female Workers; 16 Years and Over | Worked in state of residence | Worked in state of residence; Worked in county of residence | Worked in state of residence; Worked outside county of residence | Worked outside state of residence |
| Hillsborough County, Florida | 232,182 | 213,106 | 19,076 | 1,268 |
| Manatee County, Florida | 59,479 | 46,331 | 13,148 | 958 |
| Pasco County, Florida | 67,753 | 42,537 | 25,216 | 150 |
| Pinellas County, Florida | 201,771 | 179,030 | 22,741 | 1,561 |
| Polk County, Florida | 96,304 | 82,756 | 13,548 | 179 |
| Sarasota County, Florida | 66,096 | 58,650 | 7,446 | 864 |
| | 723,585 | 622,410 | 101,175 | 4,980 |
| | | 86.02% | 13.98% | 0.69% |
| Broward County, Florida | 374,169 | 299,040 | 75,129 | 2,132 |
| Miami-Dade County, Florida | 451,629 | 425,668 | 25,961 | 1,255 |
| | 825,798 | 724,708 | 101,090 | 3,387 |
| | | 87.76% | 12.24% | 0.41% |

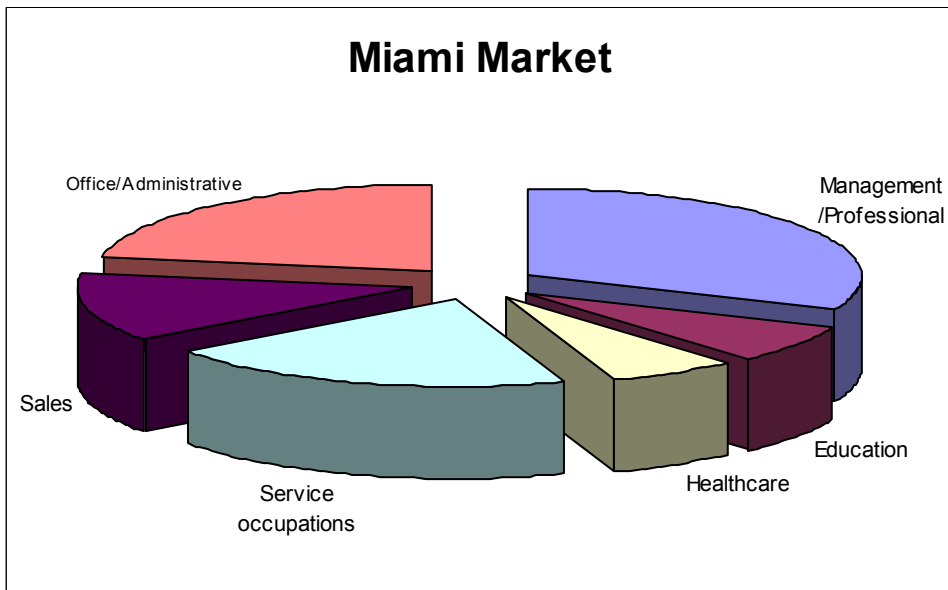
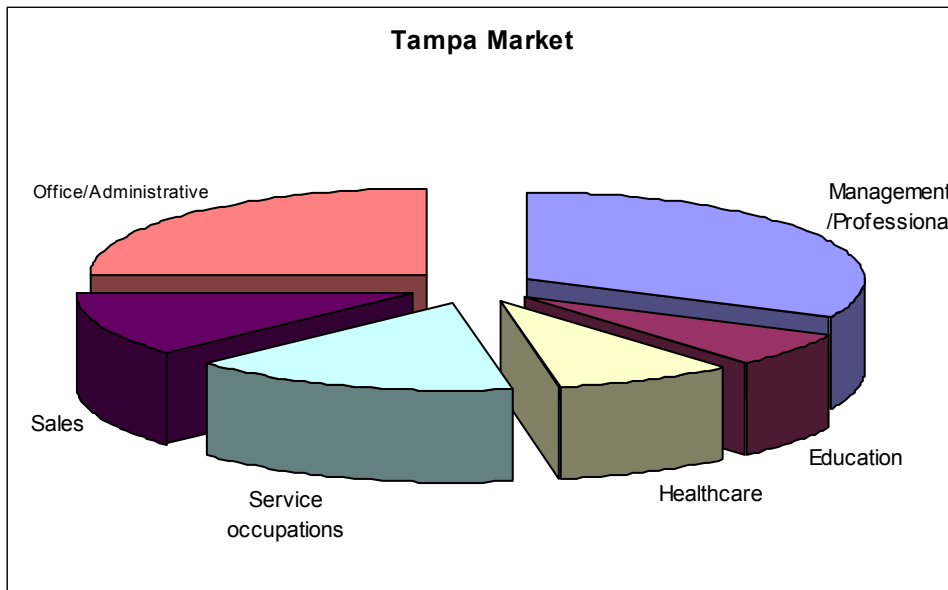
Employment and income analysis revealed that only one third of the female population in both markets works full time year round. This analysis is based on full time employment; however, it is impossible to exclude population ages outside of this program parameter with the available census data. Hence, these calculations are meant to be a population generalization. Regardless of this generalization there is consistent evidence that the peak population earning potential begins at \$15,000, diminishing at an accelerated rate beyond \$45,000. At the higher income levels of \$55,000 and above, the Miami market holds a strong lead.

What Women Make - Tampa - Miami Comparison



| Working Population 15 years and older | Available Tampa DMA data | % of total working female population only | Available Miami DMA data | % of total working female population only |
|--|--------------------------|---|--------------------------|---|
| Total Working Population | 2,874,335 | | 3,205,411 | |
| Total Female population working | 1,498,835 | | 1,683,376 | |
| Total Female Population working full time year round | 476,284 | 31.78% | 580,468 | 34.48% |
| earning less than \$14,999 | 41,591 | 2.77% | 89,312 | 5.31% |
| earning \$15,000 - 24,999 | 126,165 | 8.42% | 134,446 | 7.99% |
| earning \$25,000 - 34,999 | 117,723 | 7.85% | 128,220 | 7.62% |
| earning \$35,000 - 44,999 | 75,759 | 5.05% | 85,380 | 5.07% |
| earning \$45,999 - 54,999 | 49,576 | 3.31% | 51,738 | 3.07% |
| earning \$55,000 - 64,999 | 24,158 | 1.61% | 27,112 | 1.61% |
| earning \$65,000 - 74,999 | 12,716 | 0.85% | 18,677 | 1.11% |
| earning \$75,000 - 100,000 | 16,440 | 1.10% | 26,498 | 1.57% |
| earning over \$100,000 | 12,156 | 0.81% | 19,085 | 1.13% |

Careers for women in the Tampa and Miami markets fall predominantly within 6 major categories showing more than 60% of all occupations being either Office / Administrative or Management / Professional in nature. The only notable variation between the Tampa and Miami markets is in the Service Occupations sector, with Miami showing nearly 22% and Tampa only 17% of females holding Service positions. Overall there is a consistency between these markets with regard to the types of employment held by women.



| Working Female Population 16 years and older | Available Tampa DMA data | % of total working female population only | Available Miami DMA data | % of total working female population only |
|---|--------------------------|---|--------------------------|---|
| Management, professional, and related occupations | 262,754 | 35.03% | 296,873 | 34.39% |
| Education, training, and library occupations | 52,767 | 7.04% | 66,188 | 7.67% |
| Healthcare practitioner and technical occupations | 69,991 | 9.33% | 59,832 | 6.93% |
| Service occupations | 127,860 | 17.05% | 188,600 | 21.85% |
| Sales and related occupations | 97,030 | 12.94% | 124,579 | 14.43% |
| Office and administrative support occupations | 204,355 | 27.25% | 209,136 | 24.22% |

CAMPAIGN #1 – POSTER PARADE

This campaign aims to place full color posters at the entry point in 1400 locations where women 25 – 49, who have children, frequent within the full Tampa DMA. These locations will include, but may not be limited to:

- Day care centers (117+ in greater Tampa Bay area)
- Shapes Total Fitness centers (12 Bay area locations)
- Prominent grocery stores such as Publix, Albertsons, Winn Dixie, Kash & Karry and Wal-Mart
- YMCAs (12 Tampa Bay locations)
- Toy Stores
- McDonalds drive-thrus and those locations with Play Grounds
- Corporate Day Care Centers

Target Start Date: November 28, 2005

- Provides two weeks to implement posters in all locations.

Posters-Up Completion Date: December 9, 2005

- Provides three and a half weeks for multiple impression exposure, prior to event start date.

RATIONALE

Psychographic data indicates that women are the primary point of contact at day care centers, grocery stores and most child related activities. By placing these posters at entry points in locations where these women frequent, the circus will remain top of mind. During the busy shopping season, many women have their children with them who will also be reminded of the upcoming circus dates. These visual displays can generate conversation about the circus and its many attractions, thus increasing the family desire to attend. In the five county region covered by campaign #2, grocery store acceptance of placement can be greatly increased by using posters which advertise its charitable elements in addition to general information.

BUDGET ASSUMPTIONS

It is estimated that full color posters will run an average of \$1 per unit or less, based on the type of volume purchase capable, should multiple markets adopt this campaign. Based on research available at this point, it is a safe assumption that 1400 locations fitting the desired profile, exist within the full Tampa DMA. A \$600 budget is set aside for both internal and external labor to visit these locations and install the posters.

CAMPAIGN #2 – SCHOOL FOOD DRIVE COMPETITION

Due to the scope of this campaign, the geographic sprawl of the Tampa DMA and the number of counties that make up the market, this campaign will focus on five counties closest to the venue location. Hillsborough, Pinellas, Polk, Pasco and Manatee County schools will have the opportunity to compete in a food drive competition. The class in each county who raises the largest volume of non-perishable food donations will receive tickets for a Ringling chosen date to attend The Greatest Show On Earth®. These tickets will be located in one 3rd level section with banners commending their charitable support to the community. If possible, the class who has achieved this award and the school will be given honorable mention by the Ring Master and a round of audience applause. The family can purchase tickets in the same reserved seating section to support their winning, charity conscious students.

Target Start Date: December 1, 2005

- Provides seven working days to get information to schools and Press releases to media.

Contest Start Date: December 12, 2005

- Provides four working days, timed perfectly with the last week of school, for students to bring in and weigh their goods.

Final weigh-in date: December 15, 2005

- Provides one full day for charities to pick up consolidated goods from all schools.

Charity pick-up date: December 16, 2005

- Provides charities ample time to distribute food goods for the Holiday Season.

RATIONALE

Charitable organizations will be eager for such strong community support and able to offer assistance in pick up of food goods collected. Due to the charitable nature, school systems will be eager to participate, providing the much-needed voice to encourage participation in the program and volunteer staff to collect/weigh goods. News media will be providing coverage of charities and community outreach programs during to holiday season, focusing on needy family and the generosity of the communities. This type of media coverage will reach television, print and radio audiences well beyond the scope of the campaign. As children become excited about participating in the program, they will convey their excitement about both the charity and a chance to attend the circus. When they bring the information home to Mom, the main shopper in the household, she will have yet another advertising impression as she passed through the door at her neighborhood grocery store to bring home her child's contribution to the charity.

BUDGET ASSUMPTIONS

The bulk of a \$2000 budget will be allocated towards an estimated internal cost of \$7.50 per ticket with a minimum of 40 tickets awarded to each winning class and printing of section banners, posters, and take home flyers to be distributed to students. Posters will be placed on school bulletin boards and two-to-a-page black and white flyers to be sent home to parents with details regarding the promotion and the information on how the family can purchase tickets in the same seating section to support their winning, charity conscious students.

REFERENCES

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