2011 Southern Heritage Classic Market Assessment





Submitted By:

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2011 SOUTHERN HERITAGE CLASSIC MARKET ASSESSMENT

PROJECT PURPOSE

The research project fulfilled the following objectives:

- [1] Trend analyses.
 - [a] Patron demographic data were collected to compare with previous analyses yielding an up-to-date event patron composite.
 - [b] Behavioral and attitudinal data was collected to compare with previous analyses.
- [2] Media usage.
 - [a] Data was generated for the purpose of determining media responsiveness and interest in additional Classic "new" media services such as mobile applications.
 - [b] Data was generated for the purpose of determining social media behavior, usage of Southern Heritage Classic social media services, and interest in additional Classic media services.
- [3] Economic benefits analysis.
 - [a] Data was generated for the purpose of projecting a Southern Heritage Classic Economic Benefit to the city of Memphis.
 - [b] Data was generated to reflect event patron spending and does not include corporate sponsor or participating institution spending.

RESEARCH PROTOCOL

In order to properly execute the objectives of this research project an intercept survey format was employed. A research survey team of twelve graduate students was trained prior to the event under the supervision of Dr. Richard Irwin and Ms. Marina Barrett. Each survey was administered via a face-to-face interview providing enhanced clarification of survey item content as well as accuracy of response. In order to generate a sample representative of the event attendee population, five hundred surveys (N= 500) were prepared for completion. Of the 500 surveys, 447 were deemed usable for analysis. Data were entered and analyzed using the Statistical Package for the Social Sciences (version 12.0). Dr. Carrie Brown, Assistant Professor in the Department of Journalism at the University of Memphis, and expert in social media use and behaviors, served as a consultant, providing insight on survey item inclusion, analysis and interpretation as well as social media services evaluation.

KEY FINDINGS

- More than half of event patrons (59%) were visitors to the Memphis area, responsible for infusing \$6.3 million of direct economic benefit into the local economy. Research supports the inclusion of local, special event-induced spending, which would raise the direct economic benefit to over \$10 million and total economic benefit to \$21 million, more than 25% greater than the economic benefit analysis reported in 2008. The economic benefit analysis is limited to patron spending and does not include corporate or participating institution spending.
- The Classic continues to draw a veteran audience (averaging almost 8 years of attendance) with slightly less than half (47%) attending at least 6 times.
- Similar to previous analyses conducted by this research team the event target audience appears to be 25-45 years of age, college educated, with income more than \$50,000.
- Patrons continue to rate the Classic as something of great importance. Similar to findings from 2008, patrons rated the event as critical importance to them.
- Classic attendees demonstrate significant interest in Southern Heritage Classic "new" media with 61% of the total sample expressing interest in a Classic mobile application. Likewise, nearly half of the respondents expressed using Classic social media for purposes ranging from simply *having fun* to *accessing ticket information*. More than one-third of the respondents expressed interest in using Classic social media services as a means of *obtaining information on event sponsors*.
- Slightly more than one-third of the respondents indicated that their primary source of Classic information was email, event website, Classic Facebook or Twitter. Each provides the Classic with a cost-efficient means of communicating with event patrons.
- Classic attendees continue to enjoy tailgating as 88% of the respondents engaged in tailgating, 10% more than attending the game. Extrapolation of the data indicates that slightly less than 70,000 people attend Southern Heritage Classic events.
- When respondents were asked to recall all known sponsors of the event, almost half the respondents cited presenting sponsor FedEx (47%) with 40% citing FedEx first among any Classic sponsors recalled.

EVENT PATRON ECONOMIC BENEFITS ANALYSIS

An Economic Benefits Analysis was conducted in an effort to determine the amount of "new" dollars poured into the Memphis economy by (or on behalf of) event patrons as a result of the 2011 Southern Heritage Classic. Hence, the area of benefit was defined as the city of Memphis. Hence, these expenditures, which averaged \$341 per group (representing 2.3 patrons) for the weekend, are considered event-induced *direct* expenditures or new dollars infused into the local economy.

Extrapolation of data reported in page 7 indicates that approximately 70,000 patrons were engaged in event activities. As reported in the 2008 SHC Economic Benefits Analysis, research provides substantial evidence that for some events, spending by local residents ought to be counted toward economic impact because these residents would have spent that money outside the geographic area attending some other event or spent money at the same event had it been held in another market. In fact, approximately ten percent (10%) of local respondents cited spending at least one night in a Memphis hotel during the Classic weekend.

Approximately 60% of the respondents were visitors to the Memphis area, a significant increase from 2008 when approximately 30% responded similarly. Those event patrons visiting Memphis spent an average of 2 nights in a local hotel.

The results of this analysis indicate that approximately \$6.3 million "new" dollars were infused into the Memphis economy by visiting event patrons and participants. Including local event-induced spending would results in an economic benefit of slightly more than \$10.5 million.

Economic Benefit Analysis (Direct Spending Only)			
Patron Category	Volume	Average Weekend	Economic
		Expenditure	Benefit
Visitor Football/Tailgate	25,684	\$377	\$4,209,943
Visitor Tailgate Only	15,622	\$305	\$2,071,613
Visitor Subtotal			\$6,281,556
Local Football/Tailgate	17,848	\$382	\$2,964,320
Local Tailgate Only	11,676	\$243	\$1,233,594
Local Subtotal			\$4,197,914
Grand Total			\$10,479,470

Typically, an indirect expenditure analysis (multiplier) is applied to the initial economic stimulus (direct expenditures) to determine the total economic benefit. Budgetary restraints of the study (prohibitive costs of an *input-output model*) limited the opportunity for a categorical indirect expenditure analysis. However, a multiplier of two (2) is commonly used (signifying one additional *turnover* of each new dollar brought into the economy) which would result in a total economic benefit of approximately \$12.6 million from visitors and **\$21 million**, if local event-induced spending is included.

It is important to recognize that this figure represents the event's economic *benefit* and does not represent the economic *impact*, which necessitates a comprehensive analysis of costs incurred. Such costs may include production costs to the event manager and local government (security, police, and stadium management) as well as opportunity costs for the hospitality industry (alternative bookings or lost bookings due to the demand) or the facility.

Likewise, this figure does not include spending by out-of-market corporate sponsors or media partners who are not local businesses or spending from an account that is not managed locally. For instance, it is highly likely that a media partner such as SportSouth incurred local expenditures during broadcast production (e.g. equipment rentals, employee per diem). Similarly, rights fees paid by out-of-market event sponsors, in turn spent locally to produce the event, are commonly considered "new" monies, but were not tabulated for this report.

EVENT PATRON PROFILE

Classic Attendance Frequency

Item	Percentage Recognized			
	1999	2002	2008	2011
1 Year	39%	21.1%	18.6%	18.8%
2 – 5 Years	30%	40.8%	28.5%	34.3%
6 – 9 Years	17%	17.2%	12.8%	10.1%
10 + Years	14%	20.9%	40.1%	36.6%
Average Years Attended		5.11	8.11	7.74

Respondent Gender

Item	Percentage Recognized			
	1999 2002 2008 2011			
Male	44.2%	52.1%	62.7%	47.8%
Female	55.8%	47.9%	37.3%	51.6%

Respondent Residential Zip Code

Location	Percentage Recognized			
	2002	2008	2011	
Memphis	79.5%	71.0%**	41.3%	
Nashville, TN	4.8%	2.1%	4.4%	
Jackson, MS	5.3%	8.3%	2.1%	
Other	10.4%	18.6%	52.2%	

^{**}Reported as Memphis Metropolitan Statistical Area

Respondent Age

Item	Percentage Recognized			
	1999	2002	2008	2011
<17	N/A	0.5%	2%	9.3%*
18-24	18%	14.9%	13.5%	14.7%
25-34	26%	35.8%	25.4%	16.7%
35-44	27%	25.2%	24.4%	25.5%
45-54	19%	14.4%	21.2%	18.3%
55+	10%	9.3%	13.5%	15.5
Average Age	37.64	36.44	39.28	37.65

^{*}Due to the emphasis on social media sampling younger respondents was encouraged.

Respondent Total Annual Household Income

Item	Percentage Recognized			
	1999	2002	2008	2011
Student	6.3%	N/A	N/A	N/A
<\$25,000	11.1%	18.7%	15.9%	17.2%
\$25,000-\$49,999	39.9%	42.4%	28.8%	34.7%
\$50,000-\$74,999	24.0%	19.2%	26.4%	21.6%
\$75,000-\$99,999	11.5%	10.6%	10.5%	13.7%
\$100,000+	7.1%	4.3% (\$100-124)	10.8% (\$100-124)	7.2%
\$125,000 +	N/A	4.8%	7.5%	5.2%

What Classic events will you attend?

Event	Volume Attending			
	2008	2011		
Classic Tailgate	78.7%	88.0%		
Classic Football Game	64.5%	60.0%		
Classic College Fair	(Health Fair) 2.0%	2.1%		
NIKE Classic Coaches Luncheon	2.2%	.6%		
Classic R&B Concert	10.1%	5.3%		
Ed "Too Tall" Jones Golf Classic	1.3%	1.5%		
Classic Parade	6.5%	8.8%		
Classic Fashions & Brunch	1.1%	1.3%		
Classic Battle of the Bands	5.4%	5.5%		
Classic Concert	N/A	4.0%		
Shaquille O'Neal All-Star Comedy Jam	N/A	3.2%		
Classic VIP Party	N/A	2.3%		
Classic Catwalk & Hair Show	N/A	2.1%		

- Extrapolation of the data indicates that slightly less than 70,000 people attend Southern Heritage Classic events.
- The volume of tailgaters increased significantly from 2008 accounting for the 15% drop in game attendance.
- As reported in 2008, those attending the game spent more than those who chose to only tailgate.

Using a scale with 1 = Important and 7 = Unimportant				
Question	High	Low	Average	
How important is the Classic to you?	1	7	2.52	

• Patrons continue to rate the Classic as something of great importance.

Who are you attending the Classic with this year (check all that apply)?				
Item Percentage Recognized				
2008 2011				
Friends	64.0%	61.3%		
Family	55.1%	65.9%		
Business Associates	9.9% 9.3%			
Other	3.8%	7.2%		

• Those indicating they were attending with business associates spent an outstanding 63 minutes on Facebook and 26 minutes on Twitter game day.

What is the primary reason you attend the Classic (only one response)?			
Item Percentage Recognized			
	2008	2011	
Event Characteristics	44.0%	42.3%	
Team/Institution	19.9%	15.1%	
Game	21.9%	24.2%	
Business	2.5%	4.7%	
Other	11.8%	13.4%	

- Those attending the Classic for event characteristics continue to be younger, less likely to attend the game, and more likely to tailgate.
- Those who attend the Classic for team/institution continue to be more likely to attend the game and the least likely to tailgate.
- Those attending primarily for business purposes indicating spending a mind-boggling 120 minutes on Facebook and 61 minutes on Twitter game day.

SOUTHERN HERITAGE CLASSIC SPONSOR ASSESSMENT

Sponsor	Top of Mind Sponsorship Recall ¹			
	1	2	3	Total Recall
FedEx	179	31	14	47.0%
Allstate	42	26	21	18.7%
AutoZone	12	34	12	12.2%
Comcast	15	14	25	11.3%
McDonald's	13	18	23	11.3%
Tennessee Lottery	1	0	10	9.1%
Nike	5	11	18	7.1%
Coca-Cola	11	9	9	6.1%
MLGW	14	4	6	5.0%
Coors Light	13	5	5	4.8%
Harrah's	6	6	5	3.6%
First Tennessee Bank	3	3	4	2.1%
U.S. Marine Corps	1	2	6	1.9%
Superlo Foods	1	2	4	1.5%
U. S. Navy	N/A	2	5	1.5%
Carrier	3	1	1	1.0%
Tri-State Bank	2	1	2	1.0%
Nature Valley	2	1	2	1.0%
Blue Cross/Blue Shield	N/A	N/A	3	0.6%
Commercial Appeal	1	0	0	0.2%
Governor's Highway Safety Office	1	0	0	0.2%
Valero	1	N/A	N/A	0.2%
Play Tennessee – Tourism	N/A	N/A	1	0.2%
SportSouth	N/A	N/A	N/A	0.0%
MATA	N/A	N/A	N/A	0.0%

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¹ Prior to kick-off 447 respondents were asked to recite all companies they believed were sponsors of the Southern Heritage Classic. Top of mind responses recalled first, second, or third by the respondent are reported above. For instance, 179 of the respondents cited FedEx first while 42 cited Allstate as their initial response. These numbers assist in determining not only if, but when, respondents recall a particular sponsor.

SOUTHERN HERITAGE CLASSIC MEDIA

Main Source of Southern Heritage Classic Information		
Source	Frequency	
Word of Mouth	26.3%	
Radio	13.4%	
Email	12.7%	
TV	8.9%	
Website	8.5%	
Facebook	8.2%	
Other	5.6%	
Twitter	4.7%	
Internet Searches	4.7%	
Newspaper	4.2%	
Mail Outs	1.6%	

- 68% of those attending 5 or fewer Classics cited word of mouth as their main source of information.
- 73% of those citing Facebook as their main source of event information were attending their first Classic.
- 54% of those citing email as their main source of event information had previously attended 10 or more Classics.
- A majority of those citing Facebook as their main source of Classic information were 35 years of age and younger, residing outside of Memphis, with annual household income of \$75,000 or less.
- 80% of those citing email as their main source of Classic information were over 35 years of age.
- A majority of those citing Twitter as their main source of Classic information were 18 24 years of age.

SOUTHERN HERITAGE CLASSIC "NEW" MEDIA

Daily Social Media Usage (Time on Facebook and Twitter, in minutes)

	Facebook	Twitter
During a typical day off	90.2	56.95
At an event like this	38.65	21.94
At this event	27.88	12.26

- Those citing Facebook as their main source of Classic information spent 52 minutes on Facebook while tailgating and/or attending the game.
- Those citing email as their primary source of Classic information spent 51.7 minutes on Facebook while tailgating and/or attending the game.
- Those citing Twitter as their main source of Classic information spend 120 minutes/daily on Twitter.
- Those citing Twitter as their primary source of Classic information spent 17 minutes on Twitter while tailgating and/or attending the game.
- Veteran attendees (10+ years) spent 36 minutes on Facebook/18 minutes on Twitter while tailgating and/or attending the game.

Social Media Use During the SHC (Average posts to service in a 4-6 hour range)

Post to SHC Facebook Page	1.87
Tweet with #SHC	1.44
Read SHC Facebook Posts	2.47
Read SHC Tweets	1.6

- Those attending the game only more actively posted to Facebook (3.3) and Tweet with Classic hash tag whereas those tailgating and not attending game were more likely to read Facebook Classic posts (4.1) and Tweets (2.3).
- 54% of those who read Classic tweets also read Class Facebook posts; 31% of those who read posts, read tweets.

Southern Heritage Classic Social Media Service (Daily access week prior to game)

**Figures only reported for those indicating social media access.

3.6**

Southern Heritage Classic Social Media Use			
Item	Frequ	Frequency	
	Yes	No	
Would Use an SHC Mobile Application if available	60.7%	38.7%	
Have Fun	52.0%	47.8%	
To pass the time/something to do	47.9%	51.8%	
Discuss the game or events with others	46.1%	53.7%	
Share your opinion about the event/teams/institutions	45.9%	53.8%	
Get news or information about the game	44.3%	55.5%	
Get to know other people attending the event	44.2%	55.5%	
To share videos, blog posts, or other kinds of media you've created	42.3%	57.5%	
Get information about purchasing tickets/merchandise	41.2%	58.6%	
Get up-to-date information on players/teams	38.2%	61.5%	
Get information about SHC Sponsors	34.6%	65.2%	
Aware of SHC Facebook T-Shirt Giveaway	15.9%	83.1%	

- Those answering affirmative to Classic social media use averaged 41 minutes on Facebook during their tailgate and football game experience.
- Veteran attendees (10+ years) were more inclined to express interest in an SHC mobile application.
- Those using social media to discuss the game/events spent 51 minutes on Facebook during their tailgate and football game experience.
- Those using social media to share videos, blog posts or other kinds of media spent 50 minutes on Facebook during their tailgate and football game experience.
- 58% of those attending the event for business purposes expressed usage of Classic social media to obtain sponsor information.

Southern Heritage Classic Social Media Summary/Comparative Analysis

- Overall, the data and feedback from expert reviewers verify that [1] the Southern Heritage Classic is maintaining an active social media presence on Facebook and Twitter and [2] the efforts is well worth the time investment.
- Southern Heritage Classic fans are active users of these services, and as previous studies of other sports events have found, they are often multitasking, using their phones to access these social networks even while the live event is going on.
- Younger people and first-timers were most likely to rely on Facebook as a main source of information, so it seems clear that this is a key strategy for continuing to grow the user as well as fan base.
- The Classic should maintain a separate Twitter presence, rather than automatically posting updates from Facebook to Twitter.
 - o While automatic posts are better than nothing, auto-posts cut off abruptly in mid-sentence and aren't as user friendly.
 - o Studies by the Pew Research Center have found that online African Americans use Twitter at high rates (twice that of whites), so it makes a lot of sense to be very active on Twitter.
 - The researchers noted considerable use of the hashtag on game day. Users were talking about:
 - parties they were attending
 - other game-related activities they were involved in, and
 - connecting with other fans.
 - The hashtag was also used to promote events or products in association with the game if they are not already event sponsors, perhaps they would be targets for future sponsorships. Or, perhaps sponsors might also want to Tweet using the hashtag during the game, as long as the content remains relevant to fans.
- Previous studies have found and this study offers confirmation of the importance of immediacy, or the frequency of posting to social media sites. SHC already does well in this regard. While you don't want to flood anybody's timeline with a massive series of Facebook updates or tweets, sports fans in particular have come to expect real-time information.
- A primary reason Classic fans use social media sites is to connect with others. Previous studies have found that fans' loyalty to their team or game is enhanced when they feel a strong sense of community or connection with other fans. The Classic should consider offering a "Tweet-up" as part of the weekend events to bring some of the fans connecting on Twitter together in the "real world" to continue to help build that sense of loyalty and cohesion particularly among first-timers.
- Responding to users, through relevant and appropriately timed posts, is also important. Studies have found that social media users value interactivity and the ability to connect directly with brands such as the Classic and their sponsors.

facebook FedEx Wall Info R Friend Activity (1) Photos Videos Join Mailing List Questions 31 Events My Slides LESS 10,171 like this 20 talking about this Likes See All Tennessee State

University

State Farm

Bank

First Tennessee

Aristocrat of



University and A

facebook



Birmingham

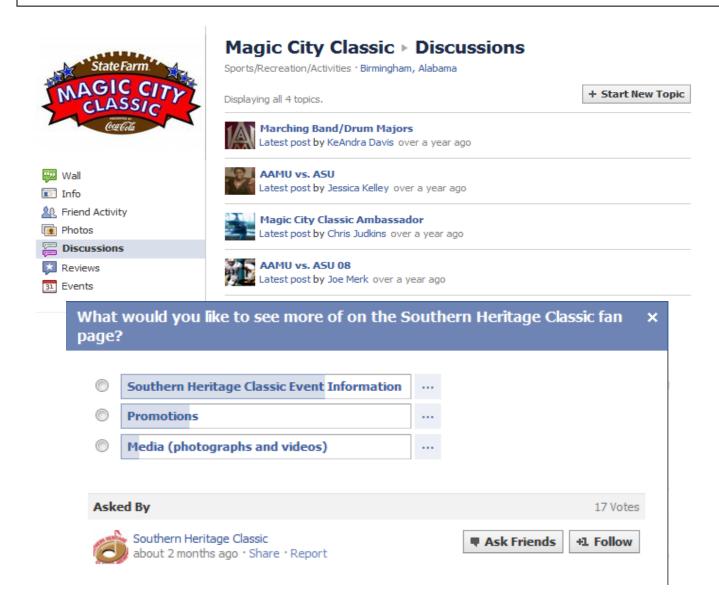
Alagasco

Convention &

Russell Athletic

- The SHC Facebook page is well maintained, engaging, and shares several common features found on other HBCU Classic Facebook pages.
- As a unique offering, the "Question" tab yields a real-time method for collecting data. To increase the response rate...
 - Rotate items more frequently (the question found on the next page has been posted for 60+ days).
 - Post prompts on the Facebook wall or Twitter and direct fans to the question.
 - o Post questions in the Facebook status and have fans leave their answer as a comment.
 - Use a "Discussion" tab (Per Magic City Classic) enabling fans to share responses and initiate discussions on an array of topics concerning Classic events/activities (see next page).

Magic City Classic Discussion Page and SHC Question Page



Facebook Wall Posts

The analysis revealed that shorter wall posts are yielding more fan interaction with 'comments' and 'likes' than posts with more content. To create more user friendly wall posts, and subsequent high response rates, consider compressing content in short, concise statements with links to blog or "discussion" pages where users can retrieve additional content. Comparative examples are used below to highlight this point and recommendation.



State Farm Bayou Classic

T.M.I. Tuesday: I guess we define a "Classic"Article written about the Bayou Classic. Have you bought your tickets yet??



What defines a classic? - NCAA.com

The word "dassic" is used a lot when describing football games between HBCU teams. Is it overused? Or does economic impact equal historical significance when it comes to defining a classic? Weekend Preview Coach Speak What to Watch Scoreboard Stats Polls: BCS | AP | Coaches'





State Farm Bayou Classic

Monday Madness: How many points does your bus have in the promotion? Like · Comment · Share · 22 hours ago





State Farm Bayou Classic

Monday Madness: Bands Edition: Human Jukebox performed last night at the Saints game. Anyone want to fill us in on the performance???





Southern Heritage Classic

We would like to THANK all of our fans who have been using our photos from the 22nd Annual Southern Heritage Classic albums to share them with others and use them as your profile pictures. There was some phenomenal footage captured this year. CHECK THEM OUT by clicking the following link.

http://www.facebook.com/SouthernHeritageClassic?sk=photos



Wall Photos





Southern Heritage Classic

There is STILL TIME for you to get in on this SPECTACULAR event! David E. Talbert http://www.davidetalbert.com/ presents WHAT MY HUSBAND DOESN'T KNOW starring Morris Chestnut, Michelle Williams, Ann Nesby and Clifton Davis at the Cannon Center (Memphis) November 3-5. Purchase your tickets TODAY at the Cannon Center Box Office, Ticketmaster Outlets, online http://www.ticketmaster.com/What-My-Husband-Doesnt-Know-tickets/artist/1511256?list_view=1&tm_link=Artist_SwitchTo_List or charge by phone 1-800-745-3000. JOIN US!



What My Husband Doesn't Know

www.ticketmaster.com

on Ticketmaster

♠ Like · Comment · Share · October 12 at 7:02pm · ♠



Southern Heritage Classic

Check out this video of the Stax Music Academy performing the National Anthem at the 22nd Annual Southern Heritage Classic by clicking the following link. EXTREMELY TALENTED YOUNG PEOPLE http://www.youtube.com/watch?v=hmEKCuqBBIE&feature=player_embedded



Wall Photos



Twitter Content

Lengthy posts, as often found on the Classic Twitter page, typically include incomplete information and, according to social media researchers, lead to less user responsiveness. As previously noted, maintaining independent Facebook and Twitter posts will enable the Classic to insure that content is fresh and not cut off thereby increasing user activity. Shorter, more succinct tweets on each timeline, relating to Facebook wall posts, should result in a more user-friendly environment. Examples below illustrate use of short, concise tweets and frequent use of the hash tag by other HBCU Classics.



SFBayouClassic SFBayouClassic

RT @opelousasrasta: #ThingsWeAllHate not making it to da #BayouClassic <<<TWEET OF THE DAY!!!!



SFBayouClassic SFBayouClassic

GM! 37 days until the #WorldFamed and #HumanJukebox BATTLE on Friday night and at halftime of the #bayouclassic!



SFBayouClassic SFBayouClassic

It's homecoming week #gramfam...Let's go



SFBavouClassic SFBavouClassic

Have you picked up a free #bayouorbust t-shirt from our @BayouC_RoadShow crew?? If not, look for us a both schools homecoming games...

18 Oct



SFBayouClassic SFBayouClassic

By the looks of things, #bayouorbust promotion is in full swing. Our mentions on #b are through the roof. st8.fm/GYj...

18 Oc



SFBayouClassic SFBayouClassic

38 days until #gramfam and #teamSU helmets collide! Lets go! #bayouclassic

18 Oct



SFBayouClassic SFBayouClassic

Have you participated in the Mile Marker questions yet? You could win an instant prize by doing so... #bayouorbust #bayouclassic



SFBayouClassic SFBayouClassic

Good Morning 39 days...YES 39 days until the #bayouclassic



SFBayouClassic SFBayouClassic

If you haven't joined the #bayouorbust promotion then you are missing out! Growing large numbers by the day. Click to see:...



MagicCtClassic Magic City Classic

#freemcctix Tuesday! Claude Houser's office 1441 Forestdale Blvd Bham 35214 for ur #freemcctix...first 2 people get a pair of tix! #aclassic70

18 Oct



MagicCtClassic Magic City Classic

Who's ready to get their tailgate on!?!? Make sure you RESERVE your spot TODAY!! LIMITED spots available visit... fb.me/1fDTrCJrQ



MagicCtClassic Magic City Classic

1HOUR ONLY! Join Coca-Cola&HOT 107.7 Morgan Road Texaco 12-1! HOTspecials onCoke...2 liters 1/\$1.47 2/\$2.50 Chance2WIN MCCtickets!

18 Oct



MagicCtClassic Magic City Classic

@KITTYversusSASA you never know what we will think of next! Keep checking in with us, and we hope to see you on the 29th! #aclassic70

18 Oct



MagicCtClassic Magic City Classic

Anyone participate in the Susan G. Komen Race for the Cure this weekend in Birmingham? Outstanding turnout for a...

fb.me/KVVVSWbp

17 Oct



MagicCtClassic Magic City Classic

Anyone participate in the Susan G. Komen Race for the Cure this weekend in Birmingham? Outstanding turnout for a...

fb.me/123EGbwSB

17 Oct



MagicCtClassic Magic City Classic

What the Classic means to you...#8 submitted by Carole Michelle I love the Magic City Classic because it is the one... fb.me/118QDII3U 17 Oct