2018 Major League Baseball Florida Spring Training Economic Impact Study

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Introduction
Goals

• Determine overall economic impact, jobs supported, and associated wages for the state of Florida for all non-local attendees* of MLB Florida Spring Training

• Determine overall economic impact, jobs supported, and associated wages of MLB Florida Spring Training team operating, facilities, and concessions expenditures

* Live outside the county in which a game is played
Executive Summary
Overall Economic Impact Profile

2018 MLB Spring Training in Florida

$687,067,100
in Economic Impact

$348,417,200
in Direct Spending

7,152
Jobs

$253,799,400
in Wages
### MLB Florida Spring Training

#### Economic Impact: 2009 vs. 2018

<table>
<thead>
<tr>
<th></th>
<th>2009(^1)</th>
<th>2018</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Impact(^2)</td>
<td>$426,573,346</td>
<td>$687,067,100</td>
<td>+61.1%</td>
</tr>
<tr>
<td>Jobs Supported</td>
<td>5,235</td>
<td>7,152</td>
<td>+36.6%</td>
</tr>
<tr>
<td>Wages</td>
<td>$162,087,507</td>
<td>$253,799,400</td>
<td>+56.6%</td>
</tr>
</tbody>
</table>

\(^1\) The 2009 report did not account for fans attending multiple games which overestimated the economic impact, jobs supported, and wages. Therefore, to make a valid comparison, the economic impact equation used for 2018 was applied to the 2009 data.

\(^2\) The 2018 economic impact multiplier for fan spending was applied to the 2009 figures.
Economic Impact Profile – All Fan Spending

2018 MLB Spring Training in Florida

$583,978,800 in Economic Impact

$296,436,000 in Direct Spending

6,084 Jobs

$214,306,300 in Wages
Economic Impact Profile – Out of State Fan Spending

2018 MLB Spring Training in Florida

$480,554,600 in Economic Impact

$243,936,400 in Direct Spending

5,006 Jobs

$176,352,100 in Wages
Economic Impact Profile – Team Spending

2018 MLB Spring Training in Florida

$103,088,300 in Economic Impact

$51,981,200 in Direct Spending

1,068 Jobs

$39,493,100 in Wages
2018 MLB Spring Training in Florida: Metrics

Total Attendance: 1,497,306

Number of Games: 237

Average Attendance per Game: 6,318

Unique Out-of-State Fans: 300,822

Unique Florida Resident Out-of-County Fans: 135,268
Fans attending a typical MLB Spring Training game:

- 6,318 fans per game
- 52% Out-of-State Residents
- 18% Florida Residents from another County
- 30% Local Residents

Fans from Florida and other states contribute significantly to the overall attendance.
Attendee Profile (Non-Local)

» Attended 2.9 Spring Training games
» 25% traveled with children
» Main Reason for visiting:
  - Spring Training (61%)
  - Vacation (18%)
» Top 2 activities outside Spring Training:
  - Dining out (60%)
  - Going to the beach (44%)
» 52 years old
» Annual household income: $93,500
» Top origin regions
  - Northeast 30%
  - Florida 28%
  - Midwest 20%
Attendee Profile (continued)

» Stayed in a hotel (34%)
» Traveled with one other person (45%)
» Drove to the destination (51%)
» Gave MLB Spring Training in Florida a 9.3 rating (on a 10-point scale)
» 86% plan on returning next year
» Saw, read, or heard advertising or promotions about MLB Spring Training (51%)
355,590

Paid Accommodation Room Nights Attributed to Visitors of MLB Florida Spring Training
Detailed Findings
Economic Impact – Fan Spending
Direct Spending by Attendees

Direct spending by category by attendees\(^1\) who attended 2018 MLB Florida Spring Training games:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>$113,670,500</td>
</tr>
<tr>
<td>Restaurants</td>
<td>$60,765,500</td>
</tr>
<tr>
<td>Groceries</td>
<td>$18,081,800</td>
</tr>
<tr>
<td>Shopping</td>
<td>$27,554,300</td>
</tr>
<tr>
<td>Entertainment</td>
<td>$40,732,000</td>
</tr>
<tr>
<td>Transportation</td>
<td>$24,432,400</td>
</tr>
<tr>
<td>Other</td>
<td>$11,199,500</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$296,436,000</strong></td>
</tr>
</tbody>
</table>

\(^1\)Direct spending figures include spending by out of state attendees and Florida attendees who live outside the county of the Spring Training game they attended.
One of the goals established by the Florida Sports Foundation for this study was to examine the economic impact of the following 4 types of fans:

1. Out of State Attendees: Primary trip purpose Spring Training
2. Out of State Attendees: Primary trip purpose other
3. Florida Resident, Non-County Attendees: Primary trip purpose Spring Training
4. Florida Resident, Non-County Attendees: Primary trip purpose other

Slides 17 through 29 show results for these 4 types of attendees.
Attendee Profile: Out of State Attendees: Primary trip purpose Spring Training

- Attended 3.3 Spring Training games
- 23% traveled with children
- Top 2 activities outside Spring Training:
  - Dining out (63%)
  - Going to the beach (47%)
- 51 years old
- Annual household income: $98,900
- Top origin regions
  - Northeast 46%
  - Midwest 25%
Economic Impact Profile

Out of State Attendees who visited for Spring Training, generated:

- $375,057,500 in Economic Impact
- $190,384,500 in Direct Spending
- 3,907 Jobs
- $137,637,200 in Wages
Attendee Profile:

Out of State Attendees:
Primary trip purpose other

- Attended 2.0 Spring Training games
- 28% traveled with children
- Main reason for visiting: Vacation (50%)
- Top 2 activities outside Spring Training
  - Dining out (69%)
  - Going to the beach (61%)
- 52 years old
- Annual household income: $98,600
- Top origin regions
  - Northeast 36%
  - Midwest 32%
Out of State Attendees who visited for another purpose, generated:

- $105,497,100 in Economic Impact
- $53,551,900 in Direct Spending
- 1,099 Jobs
- $38,714,900 in Wages
Attendee Profile: Florida Resident, Non-County Attendees: Primary trip purpose Spring Training

» Attended 2.2 Spring Training games
» 22% traveled with children
» Top 2 activities outside Spring Training
  - Dining out (46%)
  - Visiting friends & family (23%)
» 49 years old
» Annual household income: $78,000
» Top origin markets
  - Tampa-Clearwater-St. Petersburg (24%)
  - Miami-Ft. Lauderdale (14%)
  - Orlando (14%)
Florida Resident Attendees who visited for Spring Training, generated:

- Economic Impact: $73,579,800
- Direct Spending: $37,350,200
- Jobs: 767
- Wages: $27,002,000
Attendee Profile: Florida Resident, Non-County Attendees: Primary trip purpose other

» Attended 1.6 Spring Training games
» 27% traveled with children
» Main reason for visiting: Visit friends & family (32%)

» Top 2 activities outside Spring Training
  - Visiting friends & family (72%)
  - Dining out (39%)

» 56 years old

» Annual household income: $68,900

» Top origin markets
  - Miami-Ft. Lauderdale (14%)
  - Orlando (14%)
  - Tampa-Clearwater-St. Petersburg (12%)
Florida Resident Attendees who visited for another purpose, generated:

- **$29,844,400** in Economic Impact
- **$15,149,500** in Direct Spending
- **311** Jobs
- **$10,952,200** in Wages
## Economic Impact by Attendee Type

<table>
<thead>
<tr>
<th>Attendee Type</th>
<th>Economic Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Attendees</td>
<td>$ 583,978,800</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose spring training</td>
<td>$ 375,057,500</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose other</td>
<td>$ 105,497,100</td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose spring training</td>
<td>$ 73,579,800</td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose other</td>
<td>$ 29,844,400</td>
</tr>
</tbody>
</table>
# Jobs Supported by Attendee Type

<table>
<thead>
<tr>
<th>Attendee Type</th>
<th>Jobs Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Attendees</td>
<td>6,084</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose spring training</td>
<td>3,907</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose other</td>
<td>1,099</td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose spring training</td>
<td>767</td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose other</td>
<td>311</td>
</tr>
</tbody>
</table>
## Associated Wages by Attendee Type

<table>
<thead>
<tr>
<th>Attendee Type</th>
<th>Associated Wages</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Attendees</td>
<td>$214,306,300</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose spring training</td>
<td>$137,637,200</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose other</td>
<td>$38,714,900</td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose spring training</td>
<td>$27,002,000</td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose other</td>
<td>$10,952,200</td>
</tr>
</tbody>
</table>
## Average Travel Party Size by Attendee Type

<table>
<thead>
<tr>
<th>Attendee Type</th>
<th>Avg. Travel Party Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Attendees</td>
<td>2.8</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose</td>
<td></td>
</tr>
<tr>
<td>spring training</td>
<td>3.1</td>
</tr>
<tr>
<td>Out of State Attendees: Primary trip purpose</td>
<td>3.1</td>
</tr>
<tr>
<td>other</td>
<td></td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose</td>
<td>2.1</td>
</tr>
<tr>
<td>spring training</td>
<td></td>
</tr>
<tr>
<td>FL, Non-County Attendees: Primary trip purpose</td>
<td>2.1</td>
</tr>
<tr>
<td>other</td>
<td></td>
</tr>
</tbody>
</table>
# Average Nights Stayed by Attendee Type

<table>
<thead>
<tr>
<th>Attendee Type</th>
<th>Average Nights Stayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Attendees</td>
<td>3.8</td>
</tr>
</tbody>
</table>
| Out of State Attendees:  
Primary trip purpose spring training | 8.5                   |
| Out of State Attendees:  
Primary trip purpose other | 2.0                   |
| FL, Non-County Attendees:  
Primary trip purpose spring training | 3.2                   |
| FL, Non-County Attendees:  
Primary trip purpose other | 1.6                   |
Economic Impact – Team Spending
### Economic Impact Profile

MLB Spring Training team operating expenses, generated:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Impact</td>
<td>$67,485,700</td>
</tr>
<tr>
<td>Direct Spending</td>
<td>$33,912,400¹</td>
</tr>
<tr>
<td>Jobs</td>
<td>710</td>
</tr>
<tr>
<td>Wages</td>
<td>$23,482,700</td>
</tr>
</tbody>
</table>

¹ Based on spending figures provided by Major League Baseball
Economic Impact Profile

MLB Spring Training stadium operating expenses, generated:

$25,884,200 in Economic Impact

$13,007,100¹ in Direct Spending

229 Jobs

$11,359,600 in Wages

¹ Based on spending figures provided by Major League Baseball
Economic Impact Profile

MLB Spring Training stadium concessions expenses, generated:

$9,718,400 in Economic Impact

$5,061,700\textsuperscript{1} in Direct Spending

129 Jobs

$4,650,769 in Wages

\textsuperscript{1} Based on spending figures provided by Major League Baseball

FLORIDA SPORTS FOUNDATION

downs & st. germain

RESEARCH
## Economic Impact by Team Spending Type

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Economic Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Team Spending</td>
<td>$103,088,300</td>
</tr>
<tr>
<td>Team Operating Expenses</td>
<td>$67,485,700</td>
</tr>
<tr>
<td>Stadium Operating Expenses</td>
<td>$25,884,200</td>
</tr>
<tr>
<td>Stadium Concessions Expenses</td>
<td>$9,718,400</td>
</tr>
</tbody>
</table>

1 Based on spending figures provided by Major League Baseball
## Jobs Supported by Team Spending Type

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Jobs Supported¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Team Spending</td>
<td>1,068</td>
</tr>
<tr>
<td>Team Operating Expenses</td>
<td>710</td>
</tr>
<tr>
<td>Stadium Operating Expenses</td>
<td>229</td>
</tr>
<tr>
<td>Stadium Concessions Expenses</td>
<td>129</td>
</tr>
</tbody>
</table>

¹ Based on spending figures provided by Major League Baseball
# Associated Wages by Team Spending Type

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Associated Wages¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Team Spending</td>
<td>$39,493,100</td>
</tr>
<tr>
<td>Team Operating Expenses</td>
<td>$23,482,700</td>
</tr>
<tr>
<td>Stadium Operating Expenses</td>
<td>$11,359,600</td>
</tr>
<tr>
<td>Stadium Concessions Expenses</td>
<td>$4,650,800</td>
</tr>
</tbody>
</table>

¹ Based on spending figures provided by Major League Baseball
Additional Attendee Information
Main Reason for Trip – Spring Training

- **61%** of out-of-county attendee’s main reason for their trip was Spring Training
- **39%** of out-of-county attendee’s traveled for reasons other the Spring Training:

  - Vacation: 18%
  - Visit friends or family: 9%
  - Relax and unwind: 3%
  - Business trip: 3%
  - Just passing through: 2%
  - Special occasion - wedding, etc.: 1%
  - Attractions: 1%
  - Sporting Event (other than Spring Training): 1%
  - Special event or festival: 1%
  - Conference, meeting, etc.: 1%
  - Outdoor activities: 1%
  - Other: 2%
• **80%** of out-of-county attendees stayed overnight in the following accommodations:

- Hotel/motel: 43%
- Family/friends residence: 26%
- Vacation rental home, condominium, etc.: 13%
- Personal second home: 7%
- Airbnb: 4%
- Bed & Breakfast: 2%
- Campsite / campground / RV: 2%
- Other: 3%
Travel Parties

- 25% of out-of-county attendees traveled with children.
- On average, out-of-county attendees traveled in a party composed of 3.0 people.

- 16% of attendees traveled alone.
- 45% traveled with 2 people.
- 12% traveled with 3 people.
- 13% traveled with 4 people.
- 6% traveled with 5 people.
- 8% traveled with 6+ people.
Transportation

- Drive: 51%
- Fly/combination fly and drive: 47%
- Bus/Motor Coach: 2%
- Other: 1%
Satisfaction

• Out-of-county attendees rated their experience at MLB Spring Training in Florida a 9.3 out of 10\(^1\).
• 86% of out-of-county attendees will return to MLB Spring Training in Florida next year:
  - Definitely will return: 55%
  - Probably will return: 31%
  - Probably will not return: 5%
  - Definitely will not return: 1%
  - Don't know: 8%

\(^1\)Rated on a scale of 1 to 10 where 10 means excellent and 1 means poor.
Activities

- Out-of-county attendees participated in the following activities in addition to MLB Florida Spring Training:

  - Dining out: 60%
  - Going to the beach: 44%
  - Visiting friends or family: 34%
  - Going shopping: 26%
  - Visiting attractions: 23%
  - Playing golf, tennis, etc.: 13%
  - Attending a special event or festival: 9%
  - Visiting nature, parks, bird watching, etc.: 9%
  - Participating in water sports: 7%
  - Going fishing, hunting, etc.: 6%
  - Visiting art galleries, museums, etc.: 6%
  - Going hiking, running, biking, etc.: 6%
  - Sporting Event (other than Spring Training): 6%
  - Visiting a historic home or site: 5%
  - Going to the spa: 4%
  - Other: 14%
Advertising Recall

- **51%** of out-of-county attendees saw, read, or heard advertising and promotions about MLB Florida Spring Training from the following sources:

<table>
<thead>
<tr>
<th>Source</th>
<th>Recall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online advertisement</td>
<td>34%</td>
</tr>
<tr>
<td>Television</td>
<td>32%</td>
</tr>
<tr>
<td>Social media post</td>
<td>21%</td>
</tr>
<tr>
<td>News story/article (online)</td>
<td>20%</td>
</tr>
<tr>
<td>Radio</td>
<td>18%</td>
</tr>
<tr>
<td>News story/article (print)</td>
<td>11%</td>
</tr>
<tr>
<td>Print advertisement (magazines, etc.)</td>
<td>9%</td>
</tr>
<tr>
<td>Billboard</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
</tr>
</tbody>
</table>
Age

- Under 35: 16%
- 35 to 49: 30%
- 50 to 65: 37%
- Over 65: 17%

Median age = 52 years old
Marital Status

- Married: 69%
- Single: 31%
Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>66%</td>
</tr>
<tr>
<td>Female</td>
<td>34%</td>
</tr>
</tbody>
</table>
Education

- Some high school or high school degree: 10%
- Some college or Associate degree: 20%
- College graduate: 53%
- Post graduate work or degree: 17%
Race/Ethnicity

- Caucasian or white: 81%
- Hispanic: 10%
- African American or black: 5%
- Asian: 2%
- Other: 2%
Household Income

- Less than $50,000: 14%
- $50,000 to $74,999: 19%
- $75,000 to $99,999: 23%
- $100,000 to $149,999: 25%
- $150,000 to $199,999: 11%
- $200,000 or more: 8%

Median HHI = $93,500
Methodology

• The economic impact of MLB Florida Spring Training was based on data from the following sources:
  
  • Interviews conducted by Downs & St. Germain Research with 2,311 attendees of MLB Florida Spring Training,
  • Attendance and expenditure figures from MLB, and
  • Tourism database at Downs & St. Germain Research.
Methodology

• Total economic impact of 2018 MLB Spring Training on the state of Florida is a function of direct spending by visitors in Florida & induced + indirect effects of this spending.
  • Indirect effects are increased business spending resulting from Spring Training dollars.
  • Induced effects are increased household spending resulting from Spring Training dollars.
• Downs & St. Germain Research uses IMPLAN to calculate the economic multiplier.
  • IMPLAN models the way dollars are spent and re-spent in other sectors of the economy, generating waves of economic activity, called multiplier effects.
  • Over 1,500 organizations use IMPLAN, which has been used to model the economic impact of tourism since 1992. Agencies such as FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management use IMPLAN.
2018 MLB Florida Spring Training Economic Impact Study

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