



2018 Spring Training Impact

Prepared for
Lee County Sports Development

January 2019



THE BEACHES OF
**FORT MYERS
AND SANIBEL**

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Introduction and Methodology

Background

Lee County hosts two teams for spring training – the Boston Red Sox at JetBlue Park and the Minnesota Twins at CenturyLink Sports Complex.

In order to understand how hosting these teams benefits Lee County's economy, the Lee County Sports Development office contracted DPA to conduct survey-based research of spring training attendees during the February and March 2018 spring training season. A similar study was conducted by DPA during the 2009 spring training season.

Research Objectives

Major League Baseball teams contribute to Lee County's economy in many ways – an influx of players, coaches, office personnel, reporters and media support staffers – and the much larger contingent of non-residents (visitors) who attend the practices and games.

The primary purpose of the research described in this report is to estimate the economic impact of those non-residents who attended spring training games. In meeting that goal, the following objectives have also been addressed:

- Estimating the number of visitors who come to Lee County to attend spring training;
- Exploring the effect of spring training on attendees' first-time visitation, repeat visitation and home purchase decisions in Lee County;
- Profiling the visitors attending spring training and their overall travel to Lee County; and
- Comparing and contrasting the visitor profiles and economic impacts of the two teams now holding spring training in Lee County.

Methodology

In order to estimate the economic contribution of those visiting Lee County for the purpose of attending a Spring Training game, DPA conducted on-site interviews. A total of 1,183 interviews were completed with non-resident attendees at all home games, as well as three Red Sox practices and three Twins practices.

- 521 at Red Sox games (JetBlue Park)
- 560 at Twins games (CenturyLink Sports Complex)
- 52 at Red Sox practice
- 50 at Twins practice

Interviewers were stationed in specific locations where they would be able to stop and speak with a sample of attendees. Only adults who are not residents of Lee County for more than six months per year were included in the surveying. Participating adults were asked, however, to indicate the number of people in their travel party who were residents and non-residents. This resident/non-resident data was then used to estimate the number of non-resident attendees at each game, so that our reported economic impact represents only visitors to Lee County.

The table below presents total usable interviews, and the proportion of resident and non-resident attendees as calculated from the screening questionnaires.

	Total	Interview Location	
		JetBlue Park	CenturyLink Sports Complex
Usable questionnaires	1,183	521	560
Residents	25%	26%	23%
Visitors	75%	74%	77%
Total attendees*	276,458	165,688	110,770
Total visitor attendees	208,530	123,174	85,356

*Note: Attendance data provided by the Boston Red Sox and the Minnesota Twins.

Executive Summary

Spring training plays a significant role in bringing visitors to Lee County.

- ▶ Two-fifths of attendees surveyed report that they only visit Lee County during spring training.
- ▶ Half say that the primary reason they came to the Fort Myers area for this trip was to attend spring training activities.
 - Of those who do not cite spring training as the primary purpose for their trip, half still say it was at least an important factor in their decision to visit.
- ▶ While visiting, game attendees have attended or plan to attend 2-3 games, with significantly more visitors saying that they will attend more than one game than visitors saying they will attend only one game during this visit.
- ▶ With most respondents having attended spring training in Fort Myers for several years now, half say that spring training was the primary reason they first traveled to Lee County, whether on this visit or several years ago.

Spring training has a strong positive impact on the Lee County economy.

- ▶ Travelers attending spring training spend nearly \$69 million in the area while visiting*.
 - This includes \$12.1 million spent inside the ballpark while attending games and \$56.7 million spent outside the park in other areas of Lee County.
 - Money spent outside the ballpark is mostly spent on accommodations (\$18.4 million), food/beverages (\$14.4 million), and shopping (\$9.3 million).

- ▶ Further, looking at only those attendees who indicate that spring training was the primary reason they came to Lee County, or who consider it to be at least extremely important in their decision to visit, \$58.4 million was spent - 85% of the total dollars spent by spring training attendees.

**Note: The 2018 Spring Training Impact Study also included an estimation of attendee spending inside the ballpark, to account for expenditures made on items produced locally (food and beverages, etc.)*

The economic impact of these dollars spent by spring training attendees is significant.

The \$68.9 million spent by spring training attendees directly supports:

- 940 jobs,
- \$21.6 million in household income,
- \$2.5 million in local government revenues, and
- \$4.8 million in state government revenues.

In addition to the immediate impact on the local economy during the spring training season, these events continue to bring visitors (and their money) to the Fort Myers area for years to come.

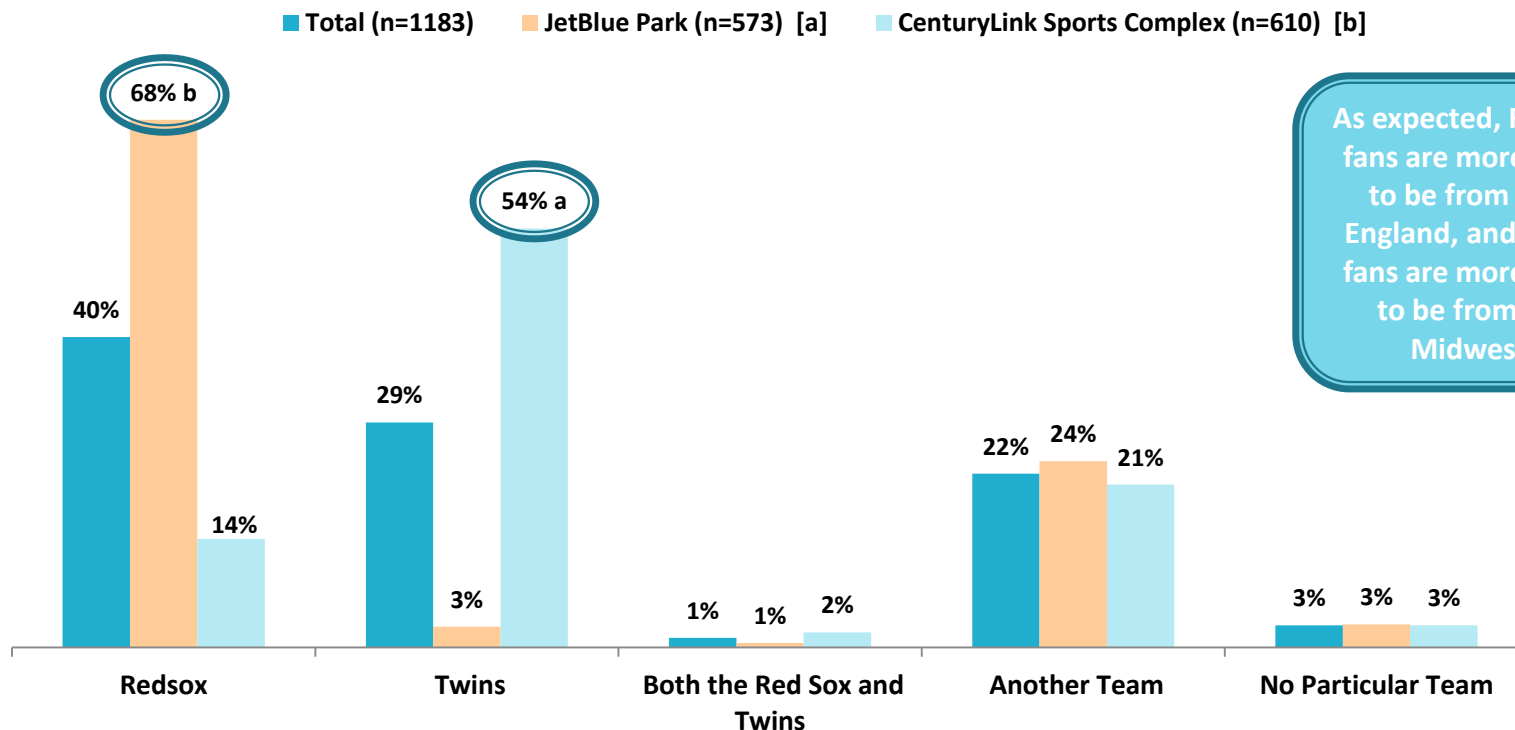
- ▶ Many spring training attendees have a long history of attending these games in Fort Myers, with 20% reporting that they first attended spring training before 2005. Two in five first attended games between 2005 and 2017.
- ▶ Spring training attendees express strong intent to return to Fort Myers for spring training in future years.
 - Two-thirds report that they *definitely or probably will return* next year for the primary purpose of attending spring training.
 - Just under two-thirds report that they *definitely or probably will return* for spring training beyond next year.
- ▶ Further, spring training attendees express strong intent to return to Fort Myers for reasons other than spring training.
 - More than half say they *definitely or probably will visit* the area next year for trips not related to spring training.
 - More than half respond similarly when asked about visiting beyond next year.

Detailed Findings

Fan Profile

Team Allegiance

- ▶ Not surprisingly, more than two-thirds of Lee County’s spring training attendees are fans of one of the teams located in Fort Myers – the Boston Red Sox or the Minnesota Twins.
- ▶ Overall, four out of ten spring training visitors to the ballparks and practice fields included in this research are Red Sox fans (40%) and three out of ten are fans of the Twins (29%).
- ▶ Predictably, those attending a specific team’s games are particularly likely to be fans of that team:
 - At JetBlue Park, two out of three identify themselves as Red Sox fans (68%);
 - At CenturyLink Sports Complex, half identify themselves as fans of the Minnesota Twins (54%).

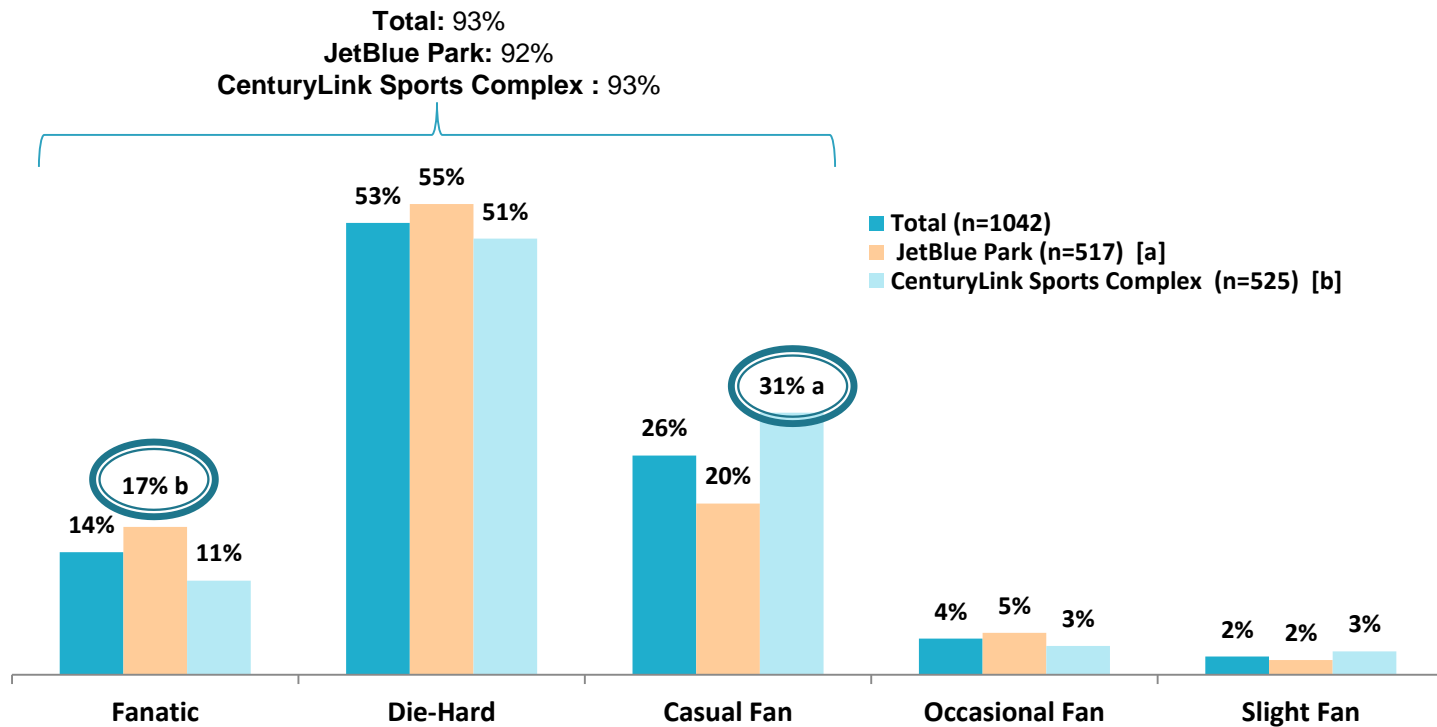


As expected, Red Sox fans are more likely to be from New England, and Twins fans are more likely to be from the Midwest.

Type of Fan

- ▶ Predictably, the large majority of those who watch spring training games consider themselves to be at least casual baseball fans (93% overall), with two-thirds calling themselves die-hard fans (53%) or fanatics (14%).
- ▶ Visitors interviewed at JetBlue Park are more likely than CenturyLink Sports Complex visitors to identify themselves as *fanatics*, while those interviewed at CenturyLink Sports Complex are more likely to identify themselves as *casual fans*.

Intensity of Interest: Casual or Greater



Demographic Profile of Spring Training Attendees

Demographic Profile of Fans

- ▶ Spring training attendees tend to be just a bit older than general winter visitors to Lee County (60 years old, on average, compared to 57 years old).
- ▶ The average spring training visitor is traveling in a party of three people, similar to travel parties to Lee County in general at this time of year. About one-fourth are traveling with children. Visitors between the ages of 35 and 44 report the largest travel party sizes (3.9 people).
- ▶ The typical spring training attendee has a household income of about \$107,000. This is similar to the average household income among general winter visitors to Lee County (\$105,000).

	Lee County General Winter Visitors (n=958)	Spring Training Attendees		
		Total (n=1,183)	JetBlue Park (n=573) [a]	CenturyLink Sports Complex (n=610) [b]
Average Age	56.9	60.2	59.6	60.7
Average Travel Party Size	3.0	3.1	3.1	3.0
% Traveling with Children (under 18)	24%	27%	30% b	24%
Average Household Income	\$105,100	\$106,900	\$107,400	\$106,500

Q25. What is your age please?

Q8. Including yourself, how many people are in your immediate travel party on this trip to the Ft. Myers area, whether or not they are here watching baseball today?

Q9. How many of those people are children under 18?

Q26. Which of the following categories includes your total annual pre-tax household income?

Visitor Origin

- ▶ Nearly all spring training attendees are from the United States (97%).
 - The most common region of origin for U.S. spring training visitors is the Midwest, though, predictably, those who are attending a Red Sox game are especially likely to be from New England (37% overall) and those who are attending a Twins game are particularly likely to be from the Midwest (60% overall).

	Lee County Winter Visitors (n=958)	Spring Training Attendees		
		Total (n=1,138)	JetBlue Park (n=552) [a]	CenturyLink Sports Complex (n=586) [b]
Country				
United States	90%	97%	97%	97%
Canada	7%	3%	2%	3%
U.S. Region	Base: U.S. Visitors	(n=978)	(n=468)	(n=510)
New England	26%	22%	37% b	8%
Midwest	57%	39%	17%	60% a
Team States	Base: U.S. Visitors	(n=978)	(n=468)	(n=510)
Massachusetts	3%	12%	21% b	4%
Minnesota	6%	19%	1%	36% a

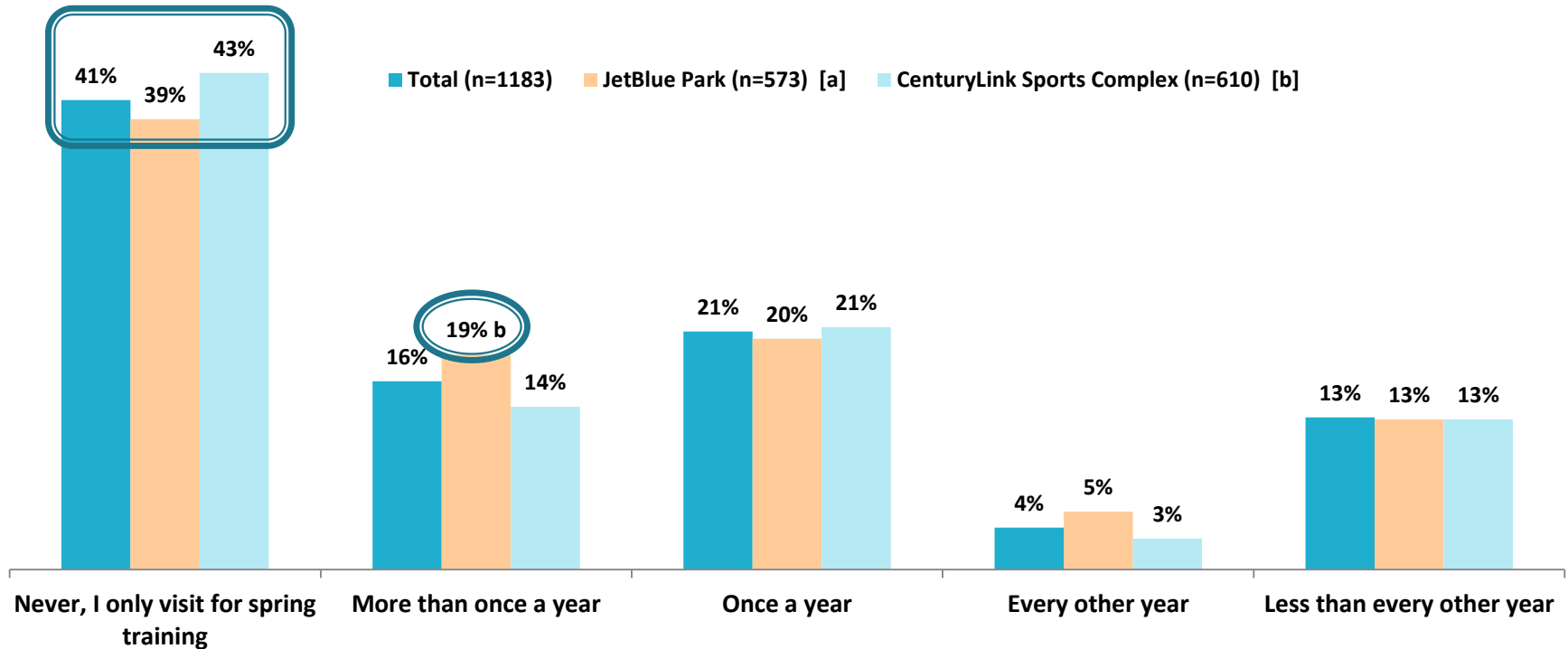
Q27. Are you currently a resident of:

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Frequency of Visits

- ▶ A large minority of those attending spring training games in Ft. Myers come to the area only for spring training (41% overall).
- ▶ One-third come to Lee County once a year (21%) or more often (16%).
- ▶ Visitors who are 55 years or older, and those who reside in Florida, are more likely to indicate that they visit Lee County more than once a year.

	AGE		RESIDENCE			
	<55 yrs (n=327) a	55+ yrs (n=786) b	FL (n=127) c	NE (n=213) D	MW (n=384) e	Other (n=254) f
More than once a year	10%	19% a	39% def	14%	13%	15%
Never, only for Spring Training	50% b	39%	20%	46% c	43% c	49% c



Q24. How often do you visit the Ft. Myers area when spring training is not being held?
a / b notations indicate a significant difference between subgroups at the 95% confidence level.



Trip Profile

Primary Reason for Trip

- ▶ Half of spring training attendees say that spring training is the *primary* reason for their visit to Lee County (50%).
 - Red Sox fans are more likely than Twins fans to be visiting Lee County specifically to attend spring training (54% vs. 47%).
- ▶ One-third of attendees surveyed come to Lee County for a general leisure trip (30%), with fans at CenturyLink Sports Complex more likely to be visiting for a general leisure trip (34% versus 26% of fans at JetBlue Park).

Primary Reason for Travel to the Ft. Myers Area	Total (n=1,183)	Interview Location	
		JetBlue Park (n=573) [a]	CenturyLink Sports Complex (n=610) [h]
To attend spring training	50%	54% b	47%
Leisure/pleasure trip	30%	26%	34% a
Visiting friends/relatives	15%	15%	15%
Business trip	1%	1%	1%
Personal business	1%	1%	1%
Convention/trade show/Conference	<1%	<1%	-

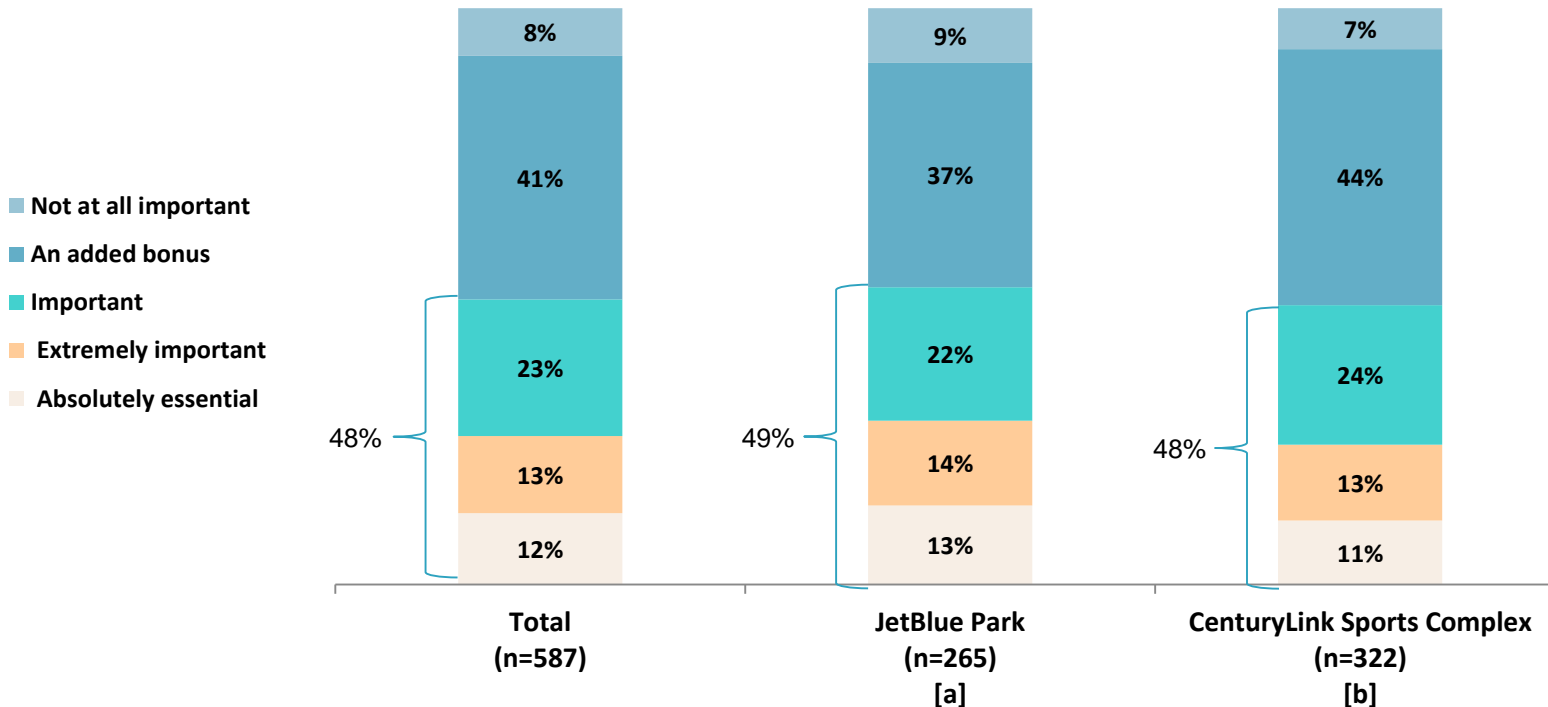
Q11. What is the primary reason you came to the Ft. Myers area on this trip? Please check only one response.

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Importance of Spring Training to Trip Decision

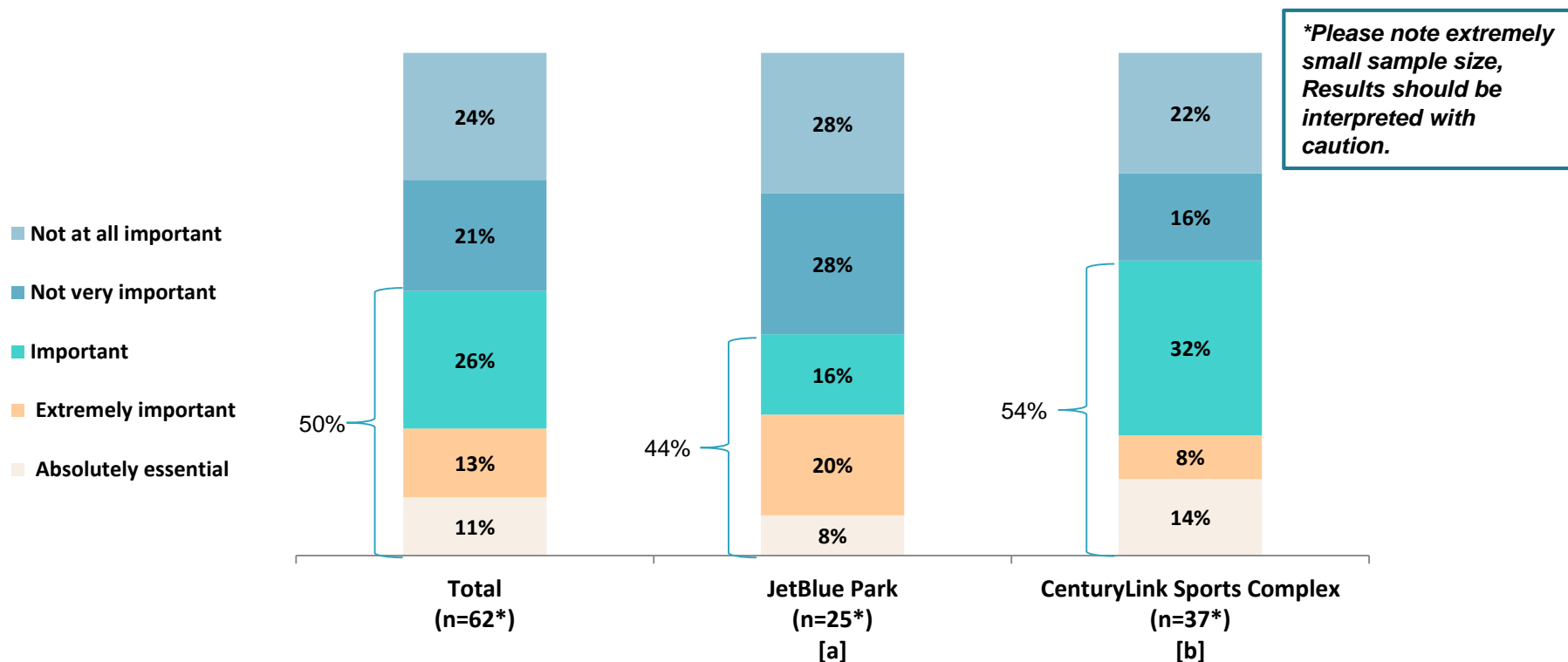
- ▶ Even if it is not the primary reason they're visiting Lee County, spring training is still a major factor in game attendees' decision to come to Lee County.
 - Among attendees reporting that spring training was not the primary reason they came to Lee County, nearly half say that it was absolutely essential (12%), extremely important (13%), or important (23%).
 - Visitors describing themselves as *fanatics* or *die-hard* fans are more likely to indicate that attending spring training was *absolutely essential* to their decision to visit Fort Myers.

	TYPE OF FAN		
	Fanatic (n=47) a	Die-Hard (n=255) b	Casual or Less (n=269) c
Absolutely essential	34% bc	15% c	6%



Importance of Spring Training to Property Purchase

- Spring training also plays a small role in purchases of property in the county. Half of those who attended games in 2018 and who own a home in the area say that spring training was at least an important factor in their decision to buy their property (50%). This includes one in ten who say it was *extremely important* (13%) or *absolutely essential* (11%) in their decision of where to buy their vacation home.

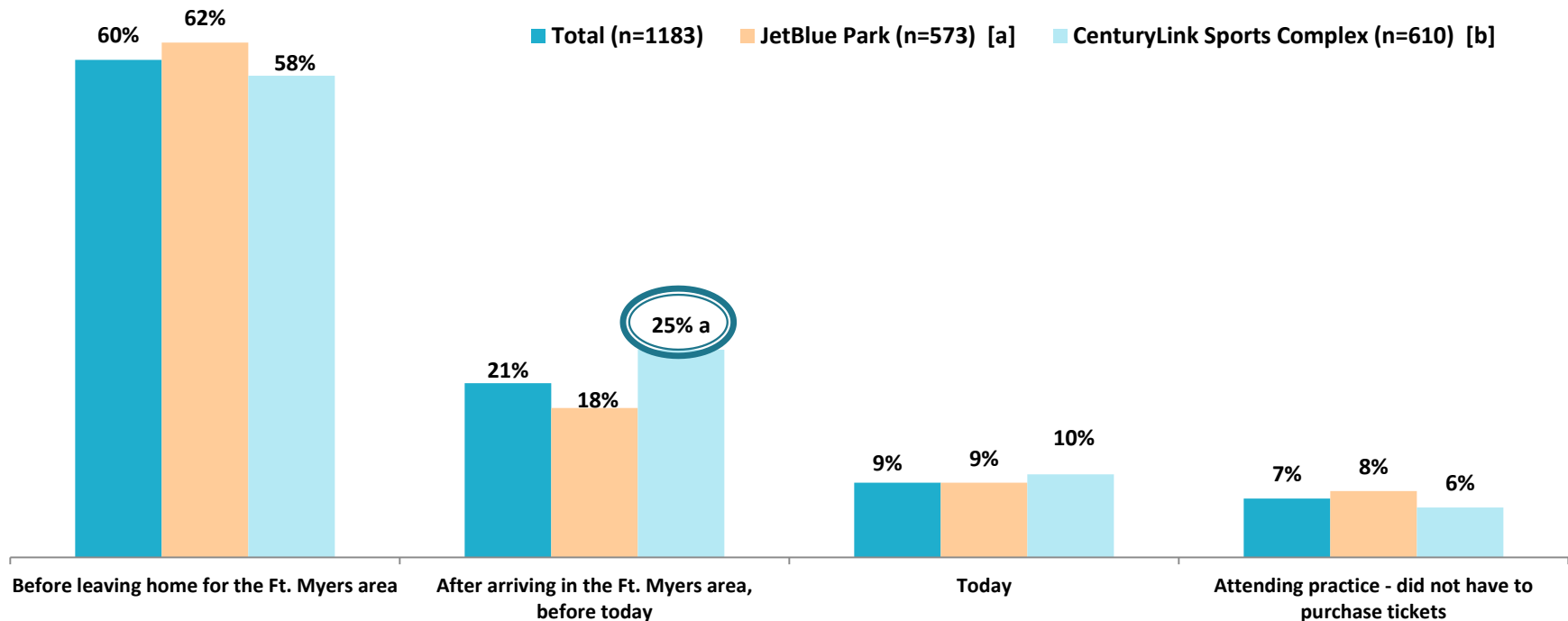


Q15. If you're staying in a vacation home/condo/cottage that you own, when you were considering where to purchase the home or condo you are staying in on this trip, how important was being in the Ft. Myers area for spring training to your selection of this area for your vacation home?

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Timing of Ticket Purchase

- ▶ Most attendees purchase their spring training tickets before leaving home for the Ft. Myers area (60%).
- ▶ Less than one-third purchase tickets after arriving in the area - either before the game (21%) or on gameday (9%) – further evidence that attending games is an important trip driver.



Q3. When did you purchase tickets for this game?

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Timing of Ticket Purchase: Sub-Group Analysis



- ▶ As seen in the table below, several types of spring training attendees are more likely to have purchased their tickets in advance of their trip:
 - Those who describe themselves as *fanatics* or *die-hard fans*;
 - Attendees staying in paid lodging;
 - Attendees under the age of 55; and
 - Attendees with household incomes of \$150,000 or more.

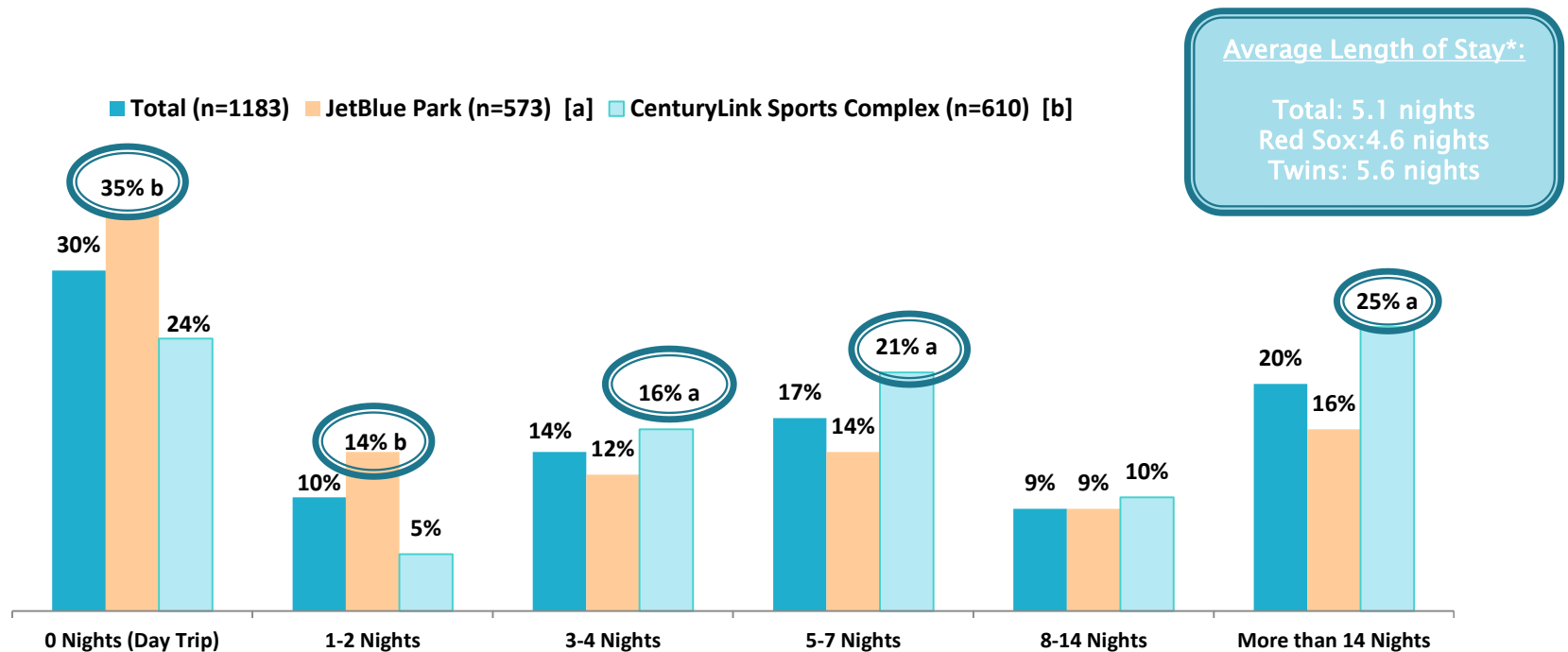
	Type of Fan			Lodging		Age		Household Income	
	Fanatic (n=159) a	Die-Hard (n=605) b	Casual or less (n=393) c	Paid (n=677) d	Non-Paid (n=324) e	<55 (n=327) f	55+ (n=786) g	<\$150k (n=636) h	\$150k+ (n=291) i
Before leaving home	70% c	63% c	52%	65% e	50%	71% g	57%	57%	70% h
After arriving in Ft. Myers, before today	11%	20%	28% ab	18%	29% d	11%	25% f	22% i	15%
Today	11%	8%	11%	9%	10%	9%	9%	11% i	7%

Q3. When did you purchase tickets for this game?

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Length of Stay

- ▶ Seven out of ten spring training attendees stay overnight in Lee County (70%).
 - Those attending a Red Sox game (35%) are more likely than attendees of Twins games (24%) to be staying just for the day.
- ▶ On average, spring training attendees spend about five nights in the area.
 - Those attending a Red Sox game tend to spend less time in Lee County: 4-5 nights on average, compared to 5-6 nights among attendees of Twins games. This is likely related to the higher proportion of Red Sox fans staying for only one day.



Q13. In total, how many nights do you plan to stay in the Ft. Myers area on this trip?

*Average length of stay would skew upwards due to respondents who visit for the season (i.e. for over 30 days). Therefore, length of stay was capped at 30 nights when calculating means for a more accurate representation of the average length of stay.

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Overnight Accommodations

- ▶ Most overnight visitors attending spring training games stay in paid accommodations (71%), with the most popular accommodations being hotels/motels (37%) and rental homes (24%).
 - Hotel accommodations are more common among Rex Sox fans than among Twins fans, while vacation homes/condos are more popular among Twins fans.
 - Vacation home/condo rentals are also more common among fans 55 years of age and older (27% versus 14% of fans under the age of 55).
- ▶ One-fourth of spring training visitors are staying in unpaid accommodations (27%), primarily at the home of family or friends (19%).

Base: Overnight Visitors	Total Overnight Visitors (n=833)	Interview Location	
		JetBlue Park (n=370) [a]	CenturyLink Sports Complex (n=463) [b]
Paid Accommodations (NET)	71%	70%	72%
At a hotel/motel	37%	42% b	32%
At a vacation home/condo/cottage - that you rented	24%	17%	29% a
At a resort	8%	8%	8%
At an RV park or campground	3%	3%	3%
Free Accommodations (NET)	27%	29%	26%
At the home of family or friends	19%	21%	17%
At a vacation home/condo/cottage - that you own	7%	7%	8%
At a vacation home/condo/cottage - that you borrowed	1%	1%	2%

Q14. While in the Ft. Myers area, will you be staying overnight:

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Location of Overnight Accommodations

- ▶ Although overnight visitors attending spring training choose to stay in a wide range of Lee County locales, they are most likely – by a wide margin – to stay overnight in Fort Myers.
 - Half of overnight spring training attendees stay in Fort Myers (48%), while only about one-tenth of spring training overnight visitors stay in any other community in Lee County.

	Total Overnight Visitors (n=833)	Interview Location	
		JetBlue Park (n=370) [a]	CenturyLink Sports Complex (n=463) [b]
Fort Myers	48%	51%	46%
Fort Myers Beach	13%	10%	15% a
Cape Coral	12%	11%	13%
Bonita Springs	9%	9%	9%
Sanibel & Captiva Islands	5%	4%	5%
North Fort Myers	4%	4%	3%
Lehigh Acres	3%	4%	2%
Pine Island	3%	2%	3%
Boca Grande & Outer Islands	<1%	1%	<1%

Q16. Where in the area are you staying?

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Location of Overnight Accommodations: Sub-Group Analysis



- ▶ Visitors stating that spring training was the primary reason for their trip to the area are more likely to stay in Fort Myers, while those visiting primarily for other reasons were more likely to stay in Bonita Springs or Sanibel/Captiva Islands.
- ▶ Visitors from the Midwest are more likely to stay overnight in Fort Myers Beach, as are Twins fans.

	Primary Reason for Trip		Residence			Fan Of:	
	Spring Training (n=415) a	Other (n=410) b	New England (n=154) c	Midwest (n=289) d	Other (n=197) e	Red Sox (n=326) f	Twins (n=269) g
Fort Myers	60% b	36%	48%	43%	53% d	53%	46%
Fort Myers Beach	11%	14%	12%	18% e	11%	10%	16% f
Bonita Springs	4%	14% a	8%	8%	8%	9%	7%
Sanibel & Captiva Islands	3%	7% a	5%	7%	5%	5%	5%

Transportation

- ▶ Nine in ten visitors attending spring training games either fly to the Fort Myers area (48%) or drive their own vehicle (43%).
 - CenturyLink Sports Complex game attendees are more likely to have flown to the area, as compared to JetBlue Park game attendees (51% versus 44%).

	Total (n=1,183)	Interview Location	
		JetBlue Park (n=573) [a]	CenturyLink Sports Complex (n=610) [b]
Fly	48%	44%	51% a
Drive a personal vehicle	43%	46%	41%
Drive a rental vehicle	6%	6%	6%
Drive an RV	1%	2%	1%
Other	<1%	<1%	<1%

Q17. How did you travel to the Ft. Myers area? (indicate PRIMARY MODE of transportation ONLY. Please mark only one).

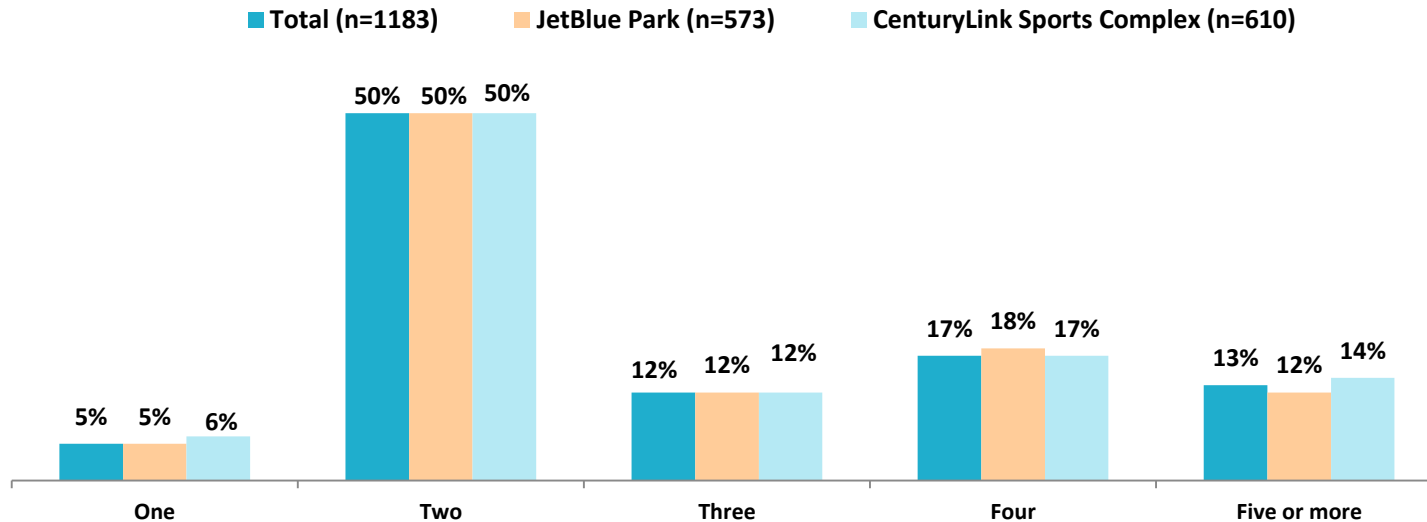
a / b notations indicate a significant difference between subgroups at the 95% confidence level.



Ballpark Experience

Travel Party Size

- ▶ Half of spring training visitors travel in parties of two (50%), with an average travel party size of three people overall. Very few travel alone (5%).
- ▶ *Casual fans*, visitors in the area for reasons *other than Spring Training*, and visitors *staying in unpaid accommodations* all travel in larger parties.

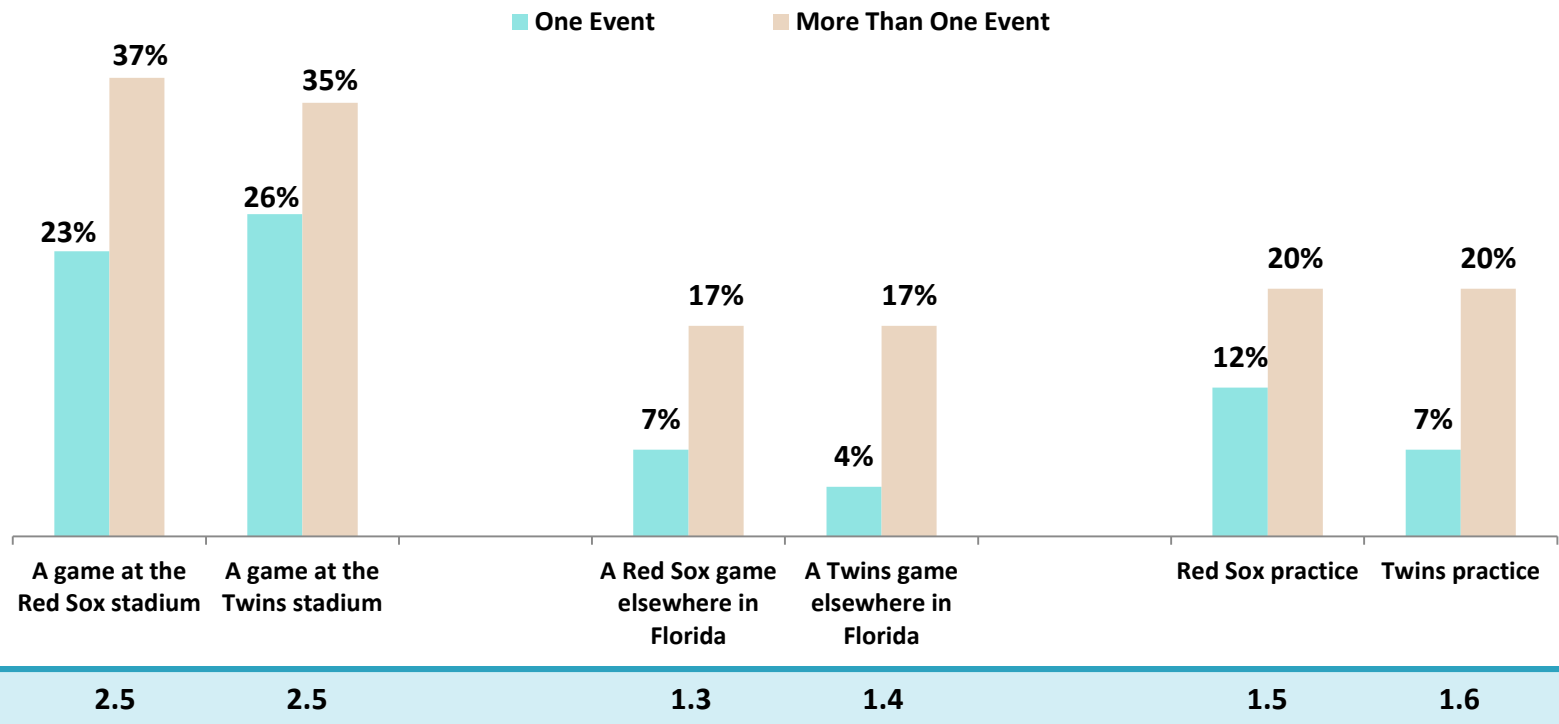


	Total (n=1183)	Type of Fan			Primary Reason for Trip		Lodging	
		Fanatic (n=159) a	Die-Hard (n=605) b	Casual or Less (n=393) c	Spring Training (n=596) d	Other (n=556) e	Paid (n=677) f	Non-Paid (n=324) g
Average Travel Party Size	3.0	2.9	2.9	3.3 ab	2.8	3.3 d	2.9	3.2 f

Q4. Including yourself, how many people in your party came out to watch baseball today?
a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Game Attendance

- ▶ Many who attend spring training games and practices take advantage of the opportunity to watch baseball on more than one occasion.
 - For each type of event, visitors are more likely to have attended or plan to attend *more than one event* as compared to *only one event*.
 - On average, game attendees have attended or plan to attend 2-3 games while in the area.

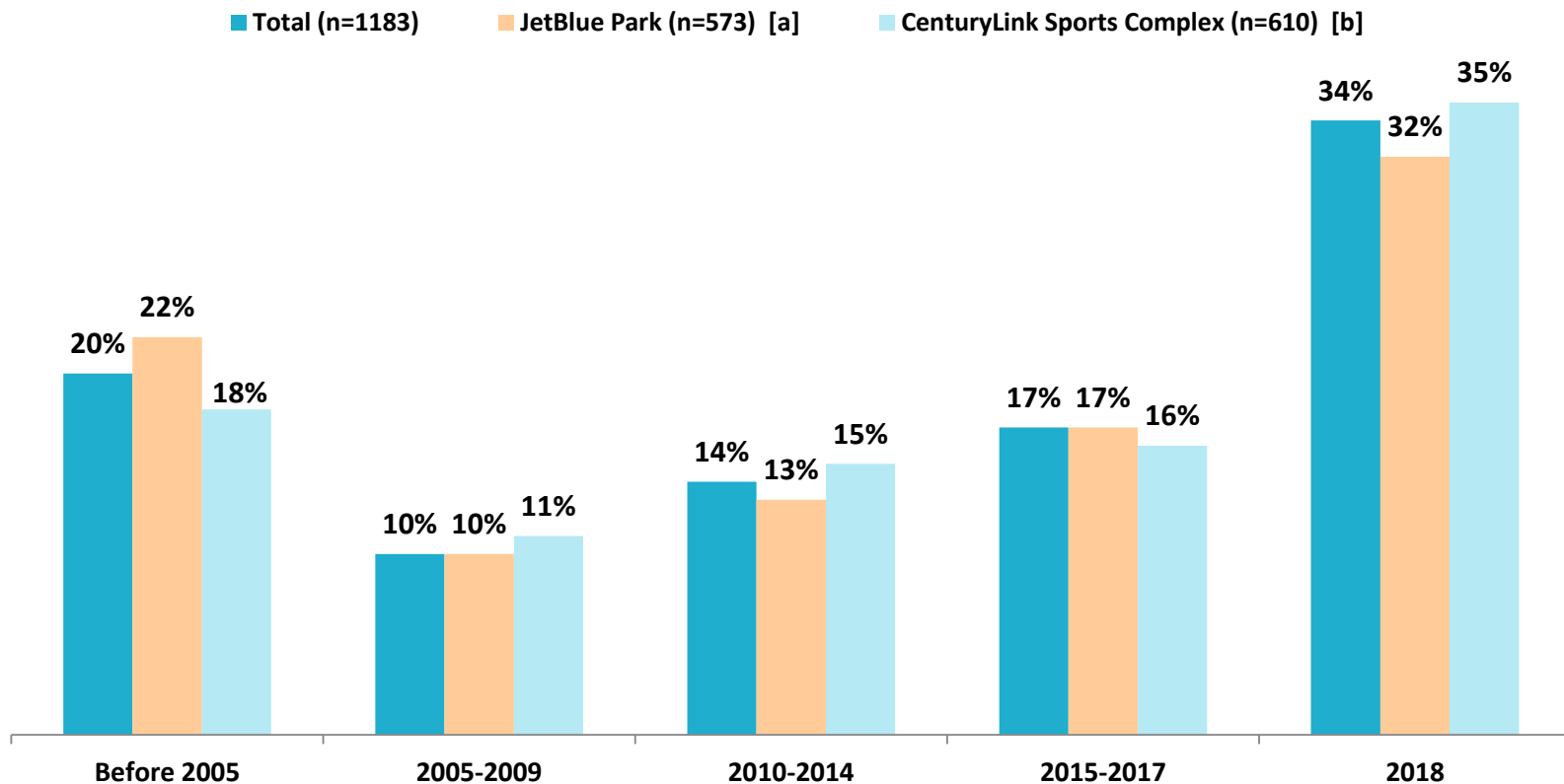




Past and Future Spring Training Attendance

Year of First Spring Training Attendance

- ▶ Many spring training visitors have a long history of attending these games, with one-fifth of those interviewed in 2018 saying they first attended spring training events more than 13 years ago – before 2005 (20%).
- ▶ Two in five first attended games between 2005 and 2017 (41%), leaving about one-third who say that this year was the first year they attended spring training.

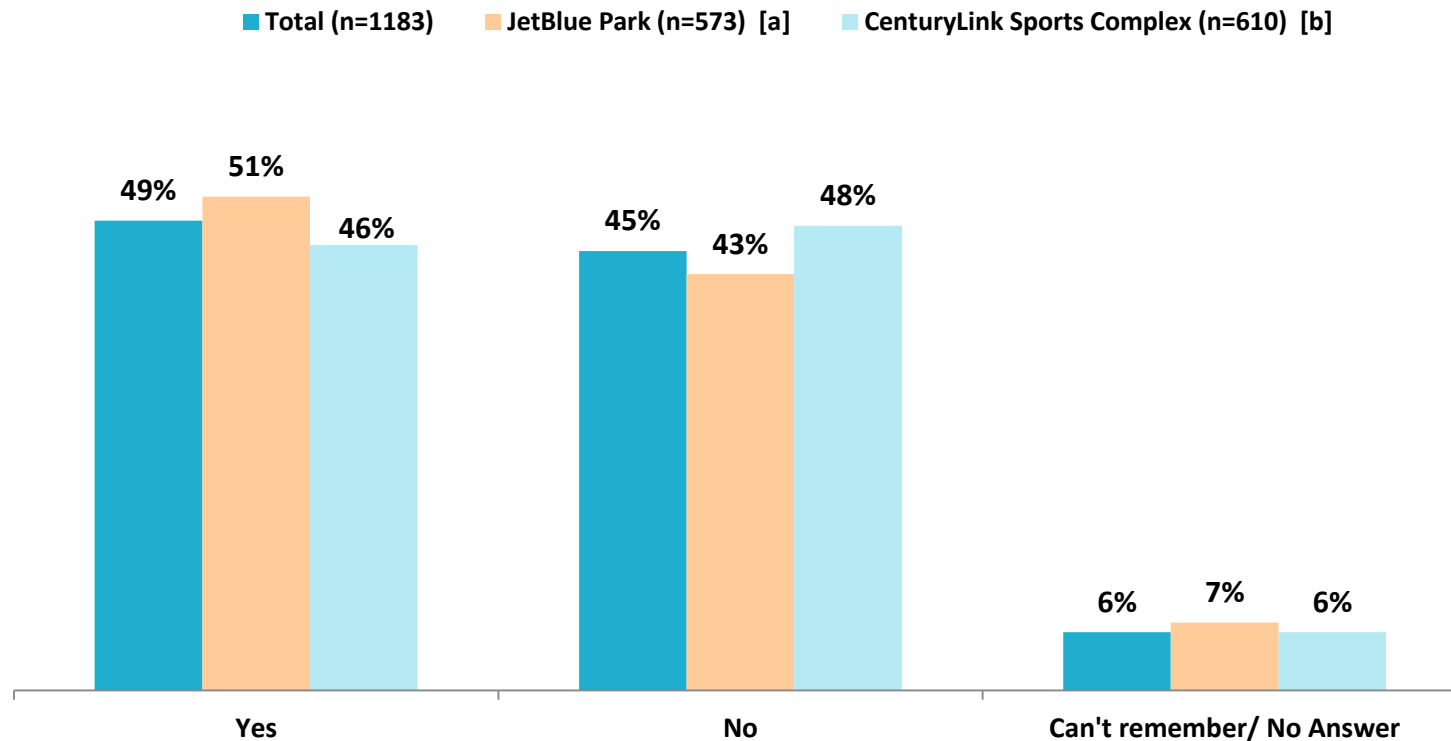


Q19. In what year did you first attend a spring training game or practice in Ft. Myers?

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Influence of Spring Training on First Visit to Lee County

- ▶ Regardless of when they first came to Lee County, half of spring training visitors (49%) say that spring training was the primary reason they first came to the Fort Myers area.

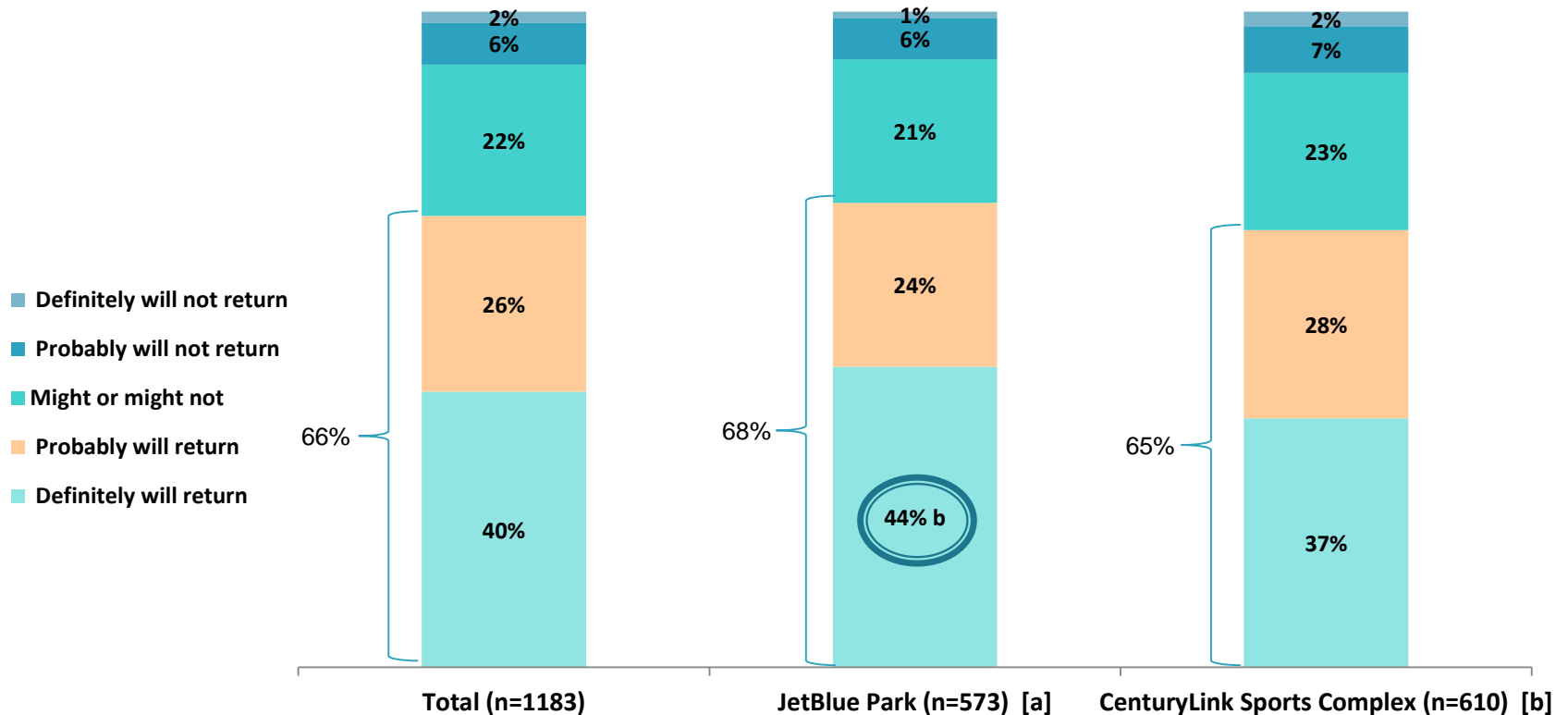


Q20. That first year, was spring training the primary reason you came to the Ft. Myers area?

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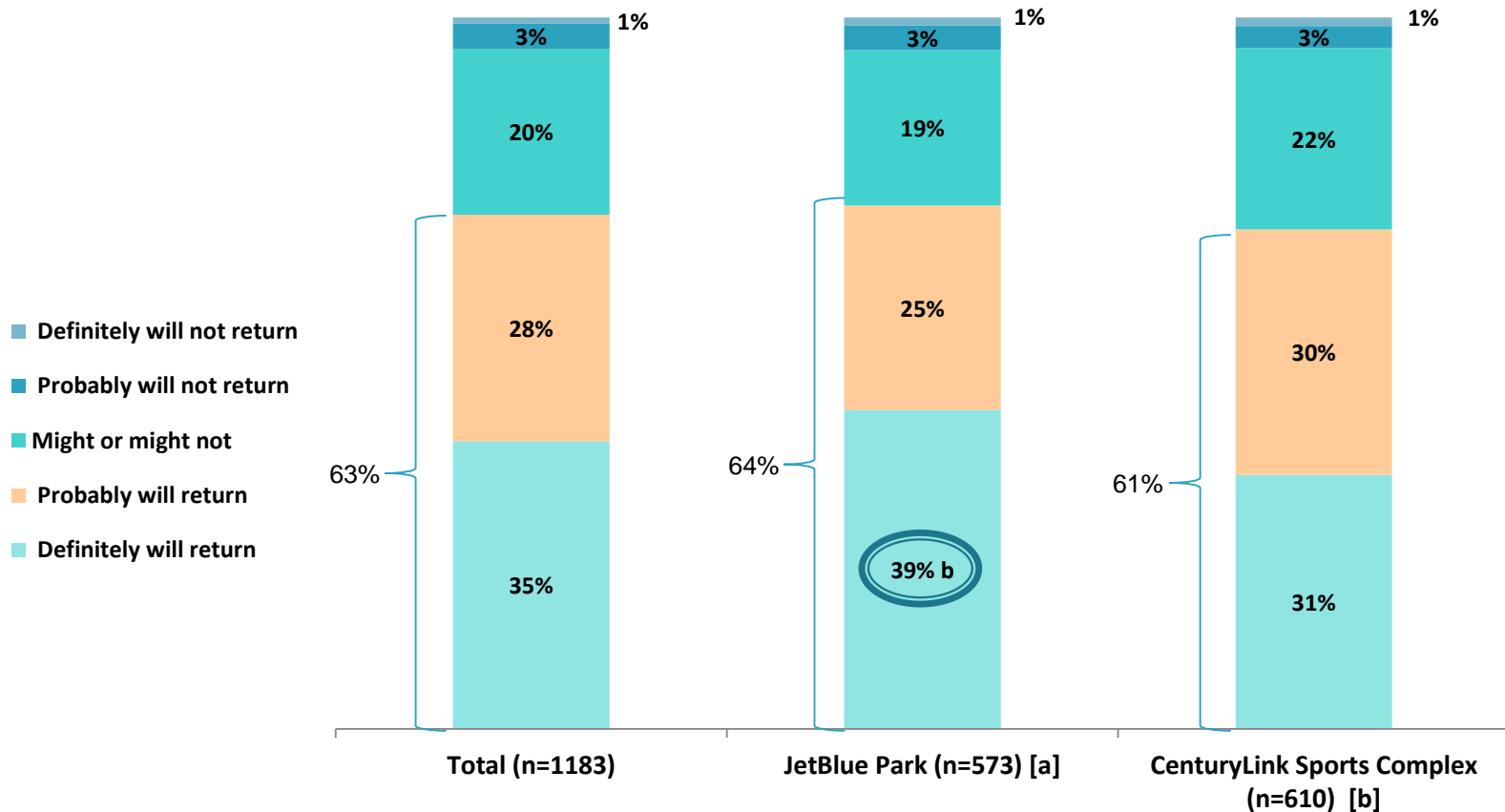
Intent to Return Next Year for Spring Training

- ▶ Spring training attendees express strong intent to return to Fort Myers for spring training next year.
 - Two-thirds say they definitely (40%) or probably (26%) will return next year.
 - Game attendees at JetBlue Park are more likely to state that they *definitely will return next year* (44% versus 37% among CenturyLink Sports Complex attendees).



Intent to Return in Future Years for Spring Training

- ▶ Spring training attendees are just as likely to return to Fort Myers for spring training beyond next year, with two-thirds saying they either definitely (35%) or probably (28%) will return in future years.
 - Game attendees at JetBlue Park are more likely to state that they *definitely will return beyond next year* (39% versus 31% among CenturyLink Sports Complex attendees).

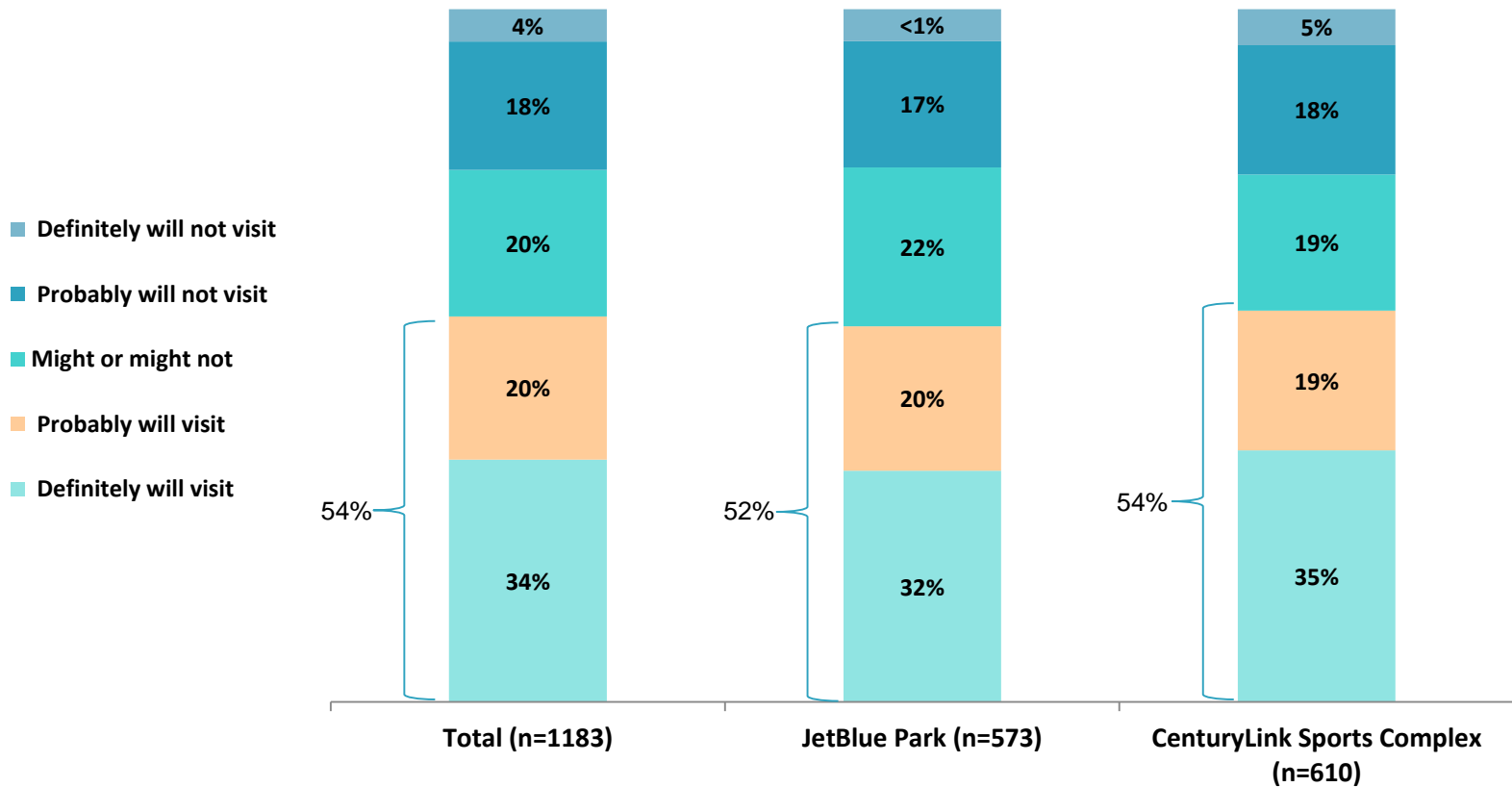


Q22b. How likely are you to return to the Ft. Myers area for the primary purpose of attending spring training... beyond next year (2020 and later)

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

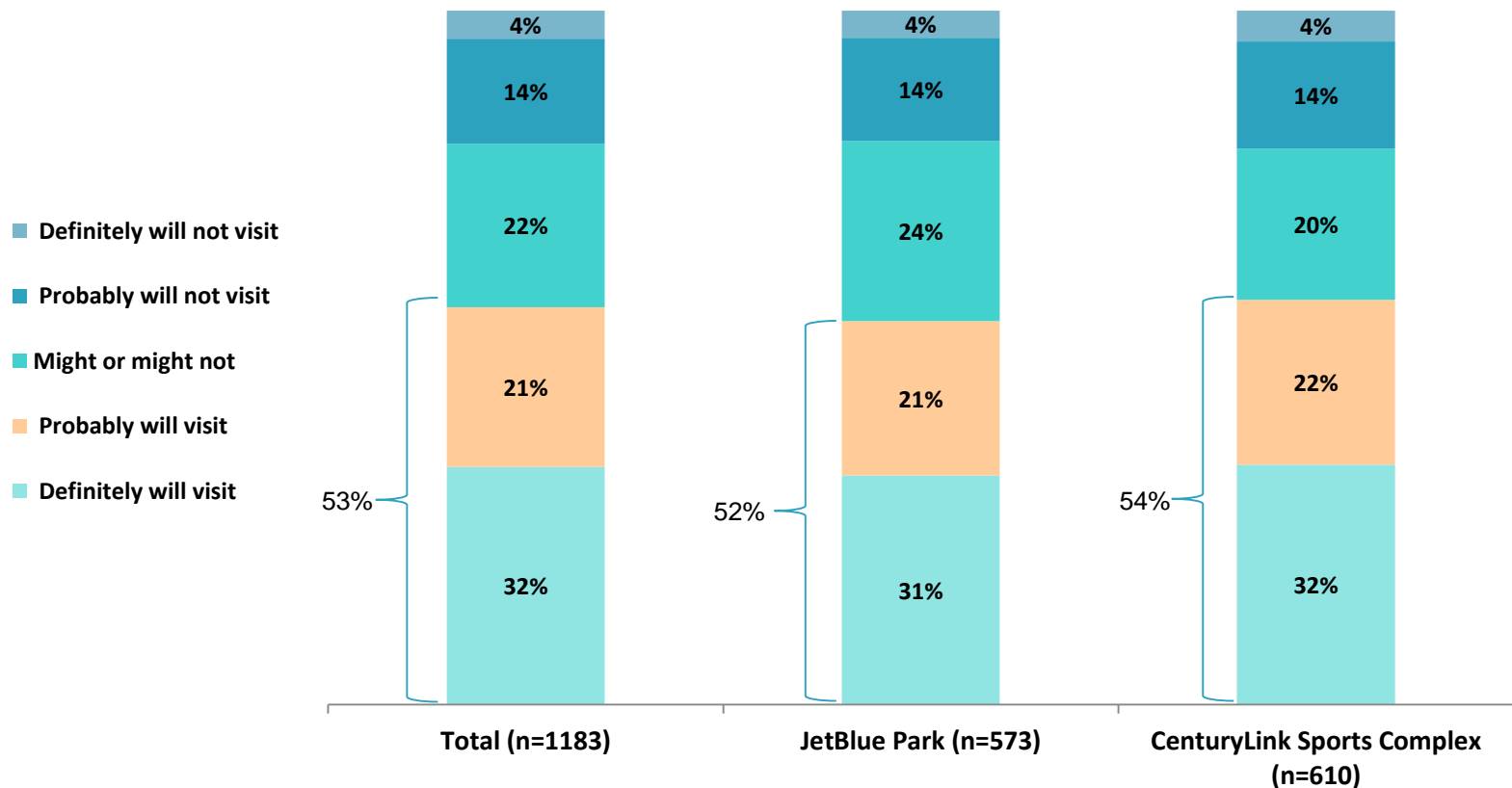
Intent to Return Next Year: Not Related to Spring Training

- ▶ Though not as strong as visiting again for spring training, attendees are also likely to visit Lee County next year for trips not related to spring training.
 - Half say they either definitely (34%) or probably (20%) will visit Lee County for reasons other than spring training next year.



Intent to Return Beyond Next Year: Not Related to Spring Training

- ▶ A similar proportion of spring training visitors intend to return to Lee County beyond next year, for reasons besides spring training.
 - Half say they either definitely (32%) or probably (21%) will visit Lee County for reasons other than spring training beyond next year.



Q23b. How likely are you to visit the Ft. Myers area for reasons other than spring training... beyond next year (2020 and later)

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Economic Impact of Spring Training Visitation



Estimated total visitor expenditures (detailed in 16 expense categories) are entered into an input-output model designed specifically for Lee County. This model classifies the visitor expenditure dollars by industry and identifies how the dollars move through the County economy. This Regional Input-Output Model is based on an economic model designed by the Federal Government, but it is modified using County Business Patterns to reflect how the economy of Lee County actually works.

In the text and figures which follow describing the impact of spring training visitor expenditures on Lee County, both direct and total impacts are mentioned.

DIRECT IMPACTS

Economic benefits due directly to visitor expenditures.

For example, when visitor expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and income

TOTAL IMPACTS

Total impacts are the sum of direct and indirect impacts.

Indirect impacts are the additional economic benefits supported during additional rounds of spending.

For example, the front desk clerk pays income tax and property tax which are an indirect result of visitor expenditures. The front desk clerk also pays his/her utility bills, buys food for his/her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

Direct Dollar Impact: Ballpark Expenditures Per Attendee

- ▶ The typical Spring Training game attendee spends about \$53 per person in the ballpark, while attending the game. The largest proportion of this is spent on *tickets*, followed by *food and beverages*.
 - Overall ballpark spending is higher among attendees at JetBlue Park, particularly for tickets and souvenirs.

	Total (n=1,183)	Interview Location	
		JetBlue Park (n=573) [a]	CenturyLink Sports Complex (n=610) [b]
Tickets	\$30.22	\$35.56	\$29.84
Food and beverages	\$11.18	\$11.62	\$12.07
Souvenirs	\$9.29	\$11.68	\$7.52
Programs	\$0.85	\$0.83	\$0.89
Other	\$2.04	\$2.38	\$1.80
TOTAL	\$53.58	\$62.07 b	\$52.12

Q7. Please tell us the amount you and your immediate travel party have spent and plan to spend as a direct result of this one outing to watch baseball.

a / b notations indicate a significant difference between subgroups at the 95% confidence level.

Direct Dollar Impact: Average Expenditures Per Person Per Day



- ▶ On average, spring training attendees spend \$160.95 per person per day, including expenditures at the park.
 - Fans at CenturyLink Sports Complex spend slightly more in total than fans at JetBlue Park. However, *in park* expenditures are higher at Jet Blue Park, while *out of park* expenditures are higher among fans at CenturyLink Sports Complex.
 - *Lodging, shopping, and food/beverage* expenditures are all higher among CenturyLink Sports Complex attendees.

	Total	Interview Location	
		JetBlue Park	CenturyLink Sports Complex
Lodging and Camping Accommodations	\$34.42	\$32.24	\$36.46
Food and Beverages	\$28.53	\$27.39	\$29.61
Shopping	\$19.86	\$18.26	\$21.36
Ground Transportation	\$6.35	\$5.84	\$6.82
Liquor Purchases	\$5.50	\$5.73	\$5.28
Other Sightseeing/Attractions	\$2.36	\$1.84	\$2.84
Events Admissions	\$2.34	\$2.30	\$2.37
Other Evening Entertainment	\$1.73	\$1.41	\$2.04
Historic/Cultural Site Admissions	\$1.61	\$1.26	\$1.94
Sport Fees	\$1.56	\$1.33	\$1.78
Cultural Performance Admissions	\$1.12	\$0.64	\$1.57
Lottery Tickets	\$0.72	\$0.68	\$0.76
Gaming	\$0.59	\$0.25	\$0.92
Licenses/Registrations/Permits	\$0.39	\$0.31	\$0.47
All other	\$0.29	\$0.29	\$0.30
Out of Park Total	\$107.37	\$99.77	\$114.52
In Park Total	\$53.58	\$62.07	\$52.12
GRAND TOTAL	\$160.95	\$161.84	\$166.64

Direct Dollar Impact: All Visitor Spring Training Attendees

- ▶ Visitors attending spring training in Lee County in 2018 spent an estimated \$68.9 million in the area. Total spending is higher among visitors to JetBlue Park, mostly tied to the higher in-park expenditures at JetBlue Park.

	Total	Interview Location	
		JetBlue Park	CenturyLink Sports Complex
Lodging and Camping Accommodations	\$18,415,058	\$9,306,912	\$9,108,145
Food and Beverages	\$14,437,697	\$7,487,277	\$6,950,420
Shopping	\$9,341,674	\$4,596,817	\$4,744,857
Ground Transportation	\$5,541,307	\$3,064,342	\$2,476,965
Liquor Purchases	\$2,814,398	\$1,622,871	\$1,191,528
Other Sightseeing/Attractions	\$1,193,980	\$500,386	\$693,594
Events Admissions	\$1,267,848	\$627,728	\$640,119
Other Evening Entertainment	\$757,190	\$323,592	\$433,598
Historic/Cultural Site Admissions	\$747,888	\$300,211	\$447,677
Sport Fees	\$703,484	\$310,411	\$393,073
Cultural Performance Admissions	\$486,185	\$118,195	\$367,989
Lottery Tickets	\$346,519	\$160,863	\$185,656
Gaming	\$341,420	\$84,222	\$257,197
Licenses/Registrations/Permits	\$186,679	\$70,366	\$116,313
All other	<u>\$165,537</u>	<u>\$97,206</u>	<u>\$68,331</u>
Out of Park Total	\$56,746,864	\$28,671,401	\$28,075,463
In Park Total	\$12,106,576	\$7,649,934	\$4,456,642
GRAND TOTAL	\$68,853,440	\$36,321,335	\$32,532,105

Direct Dollar Impact: Spring Training Primary Reason for Trip

- ▶ An estimated \$58.4 million was spent by those visitors for whom spring training is either the primary reason for their trip to the area or who consider spring training to be absolutely essential or extremely important in selecting Lee County as a destination.
 - Looking at this subset of spring training visitors, fans at JetBlue Park spent more than fans at CenturyLink Sports Complex.

	Total	Interview Location	
		JetBlue Park	CenturyLink Sports Complex
Lodging and Camping Accommodations	\$16,641,992	\$8,541,981	\$8,100,011
Food and Beverages	\$12,604,926	\$6,604,133	\$6,000,794
Shopping	\$7,807,015	\$3,830,261	\$3,976,755
Ground Transportation	\$4,919,560	\$2,762,513	\$2,157,047
Liquor Purchases	\$2,428,660	\$1,449,411	\$979,249
Other Sightseeing/Attractions	\$1,008,907	\$424,827	\$584,080
Events Admissions	\$1,112,378	\$522,515	\$589,863
Other Evening Entertainment	\$621,592	\$247,627	\$373,965
Historic/Cultural Site Admissions	\$629,165	\$233,996	\$395,170
Sport Fees	\$579,321	\$261,257	\$318,063
Cultural Performance Admissions	\$406,182	\$72,698	\$333,485
Lottery Tickets	\$288,456	\$122,677	\$165,778
Gaming	\$313,104	\$81,785	\$231,319
Licenses/Registrations/Permits	\$152,834	\$54,523	\$98,310
All other	\$150,974	\$93,144	\$57,830
Out of Park Total	\$49,665,066	\$25,303,348	\$24,361,718
In Park Total	\$8,774,363	\$5,872,678	\$2,901,685
GRAND TOTAL	\$58,439,429	\$31,176,026	\$27,263,403

Economic Impact: Employment

In order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people.

The number of jobs necessary to produce what is purchased with visitor expenditures is the employment impact of the visitor expenditures.

DIRECT EMPLOYMENT

Includes the number of employees necessary to produce the direct output purchased with the visitor expenditures.

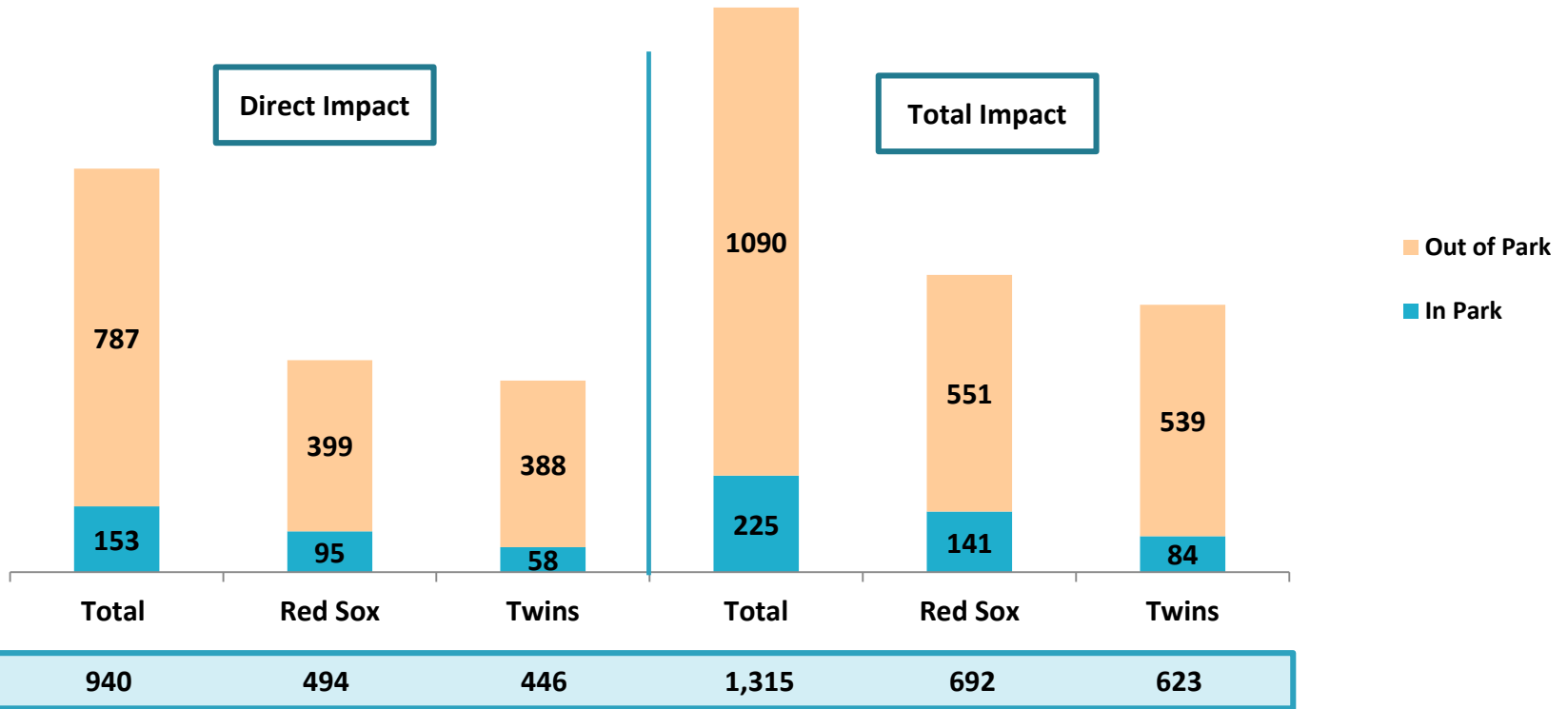
TOTAL EMPLOYMENT

Includes the number of employees necessary to produce the direct output purchased with visitor expenditures PLUS the employees necessary to produce additional output purchased with the recirculation of money in Lee County. For example, wages paid to a hotel desk clerk are then used to purchase food and services for that employee, leading to additional supported jobs (grocery store proprietor, auto mechanic, etc.)

Employment Impact – All Visitors

- ▶ 940 jobs were directly supported by spring training attendees in Lee County, with a total impact of 1,315 supported jobs.

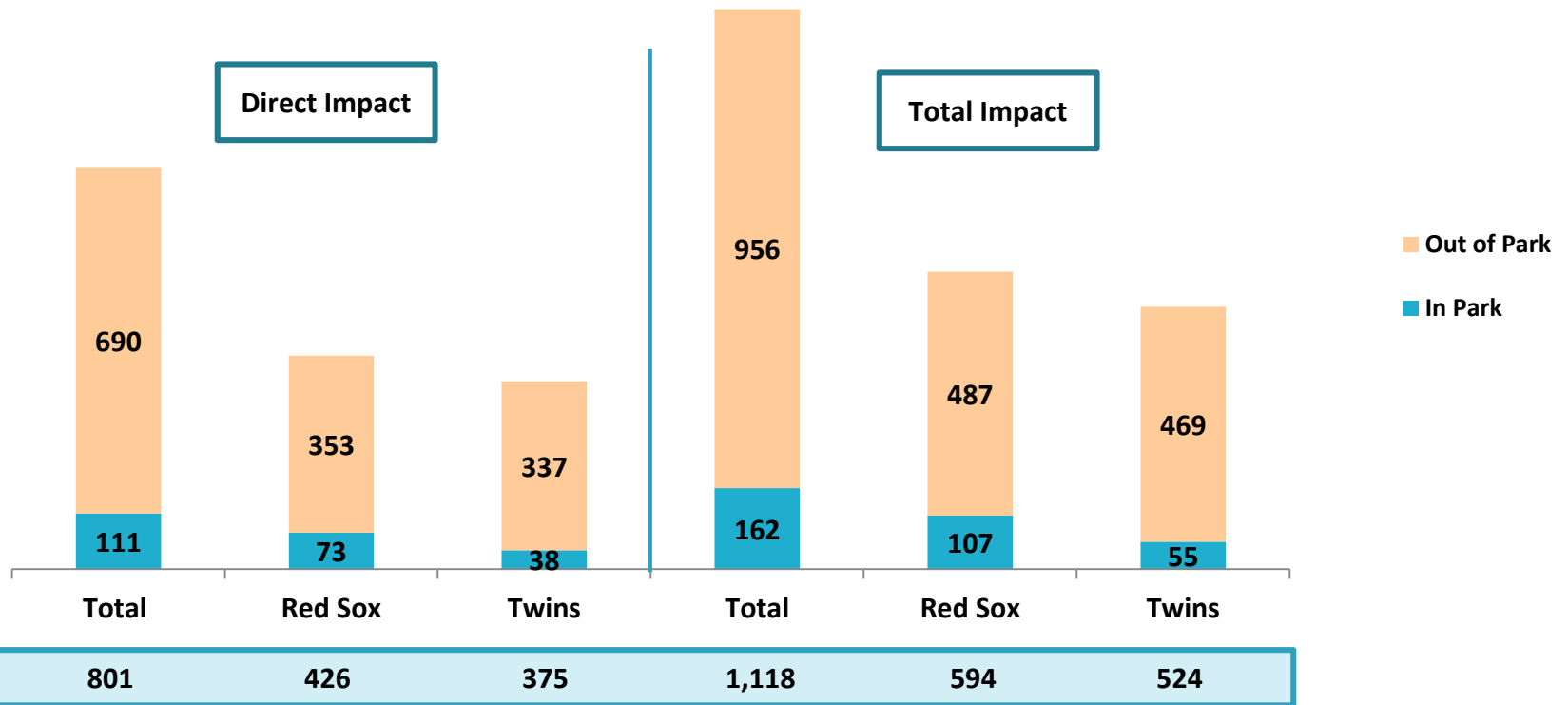
Employment Impact of Estimated Visitor Expenditures



Employment Impact: Spring Training Primary Reason for Trip

- ▶ Including only the expenditures of those attendees who indicate that spring training was the primary reason they visited Lee County, 801 jobs in Lee County were directly supported, with a total impact of 1,118 supported jobs.

Employment Impact of Estimated Visitor Expenditures



Economic Impact: Household Income



As stated earlier, in order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people. This requires business owners to pay wages and salaries to their employees, and also includes proprietary income for the business owner in some cases.

The wages and salaries paid in order to produce the goods and services purchased by visitors is the household income impact of the visitor expenditures.

DIRECT HOUSEHOLD INCOME

Includes the direct wages and salaries paid in order to produce the goods and services purchased directly by visitors.

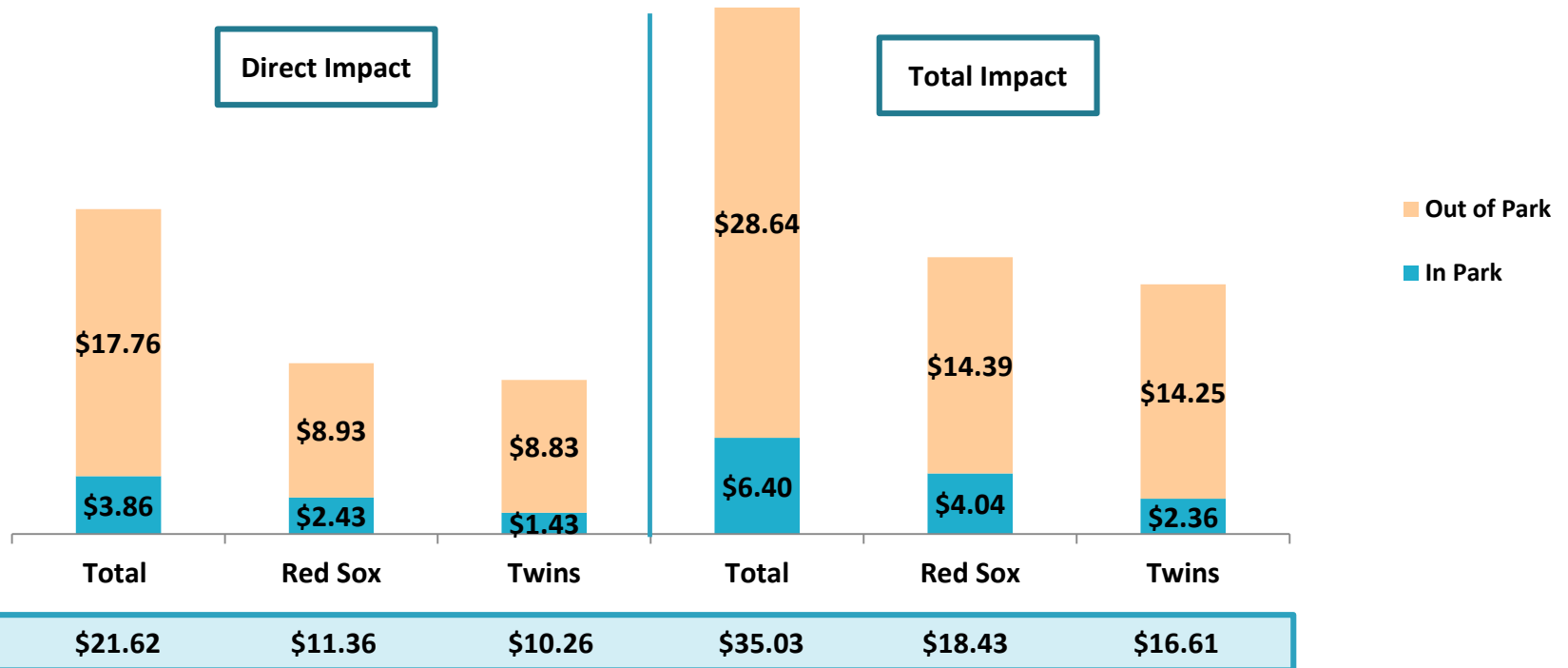
TOTAL HOUSEHOLD INCOME

Includes the wages and salaries paid in order to produce the goods and services purchased directly by visitors PLUS the wages and salaries necessary to produce the additional output purchased with the recirculation of money in Lee County. For example, wages brought home by a hotel desk clerk are then used to purchase food and services for that person and his/her family, leading to additional wages and salaries being paid to others (grocery store employee, utility crews, etc.)

Household Income Impact – All Visitors

- Attendees of spring training games directly support \$21.6 million in Lee County household incomes, with additional rounds of spending supporting a total of \$35 million in household incomes.

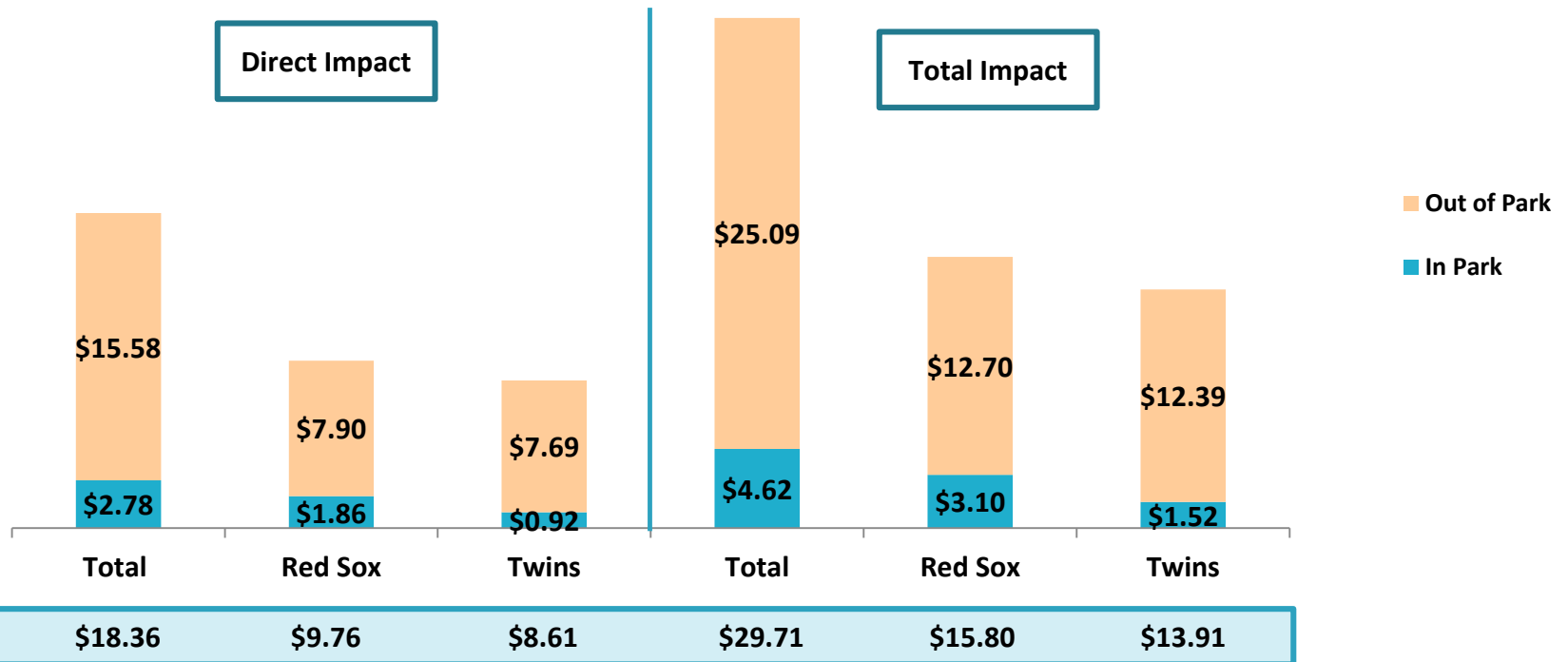
Household Income Impact of Estimated Visitor Expenditures (\$ millions)



Household Income Impact: Spring Training Primary Reason for Trip

- ▶ The expenditures of game attendees whose primary reason for visiting Lee County was to attend spring training directly supported \$18.4 million in county household incomes, with a total of \$29.7 million supported.

**Household Income Impact of Estimated Visitor Expenditures
(\$ millions)**





In producing and selling any goods and services purchased by visitors, both local and state revenues are collected by government agencies.

The gross revenue collected by government agencies as a result of producing the output purchased with visitor expenditures is the government revenue impact.

The following are included in government revenues as appropriate for the local area: gasoline taxes, vehicle licenses and registrations, boat registrations, hunting and fishing licenses, liquor taxes, local and state park user fees, etc.

Tax ratios used to calculate these government revenue impacts are adjusted to conform to data reported in State and Local Government Finance Data (SLGF, Bureau of the Census).

LOCAL GOVERNMENT REVENUE

These are taxes paid to the local (Lee County) government. They include the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

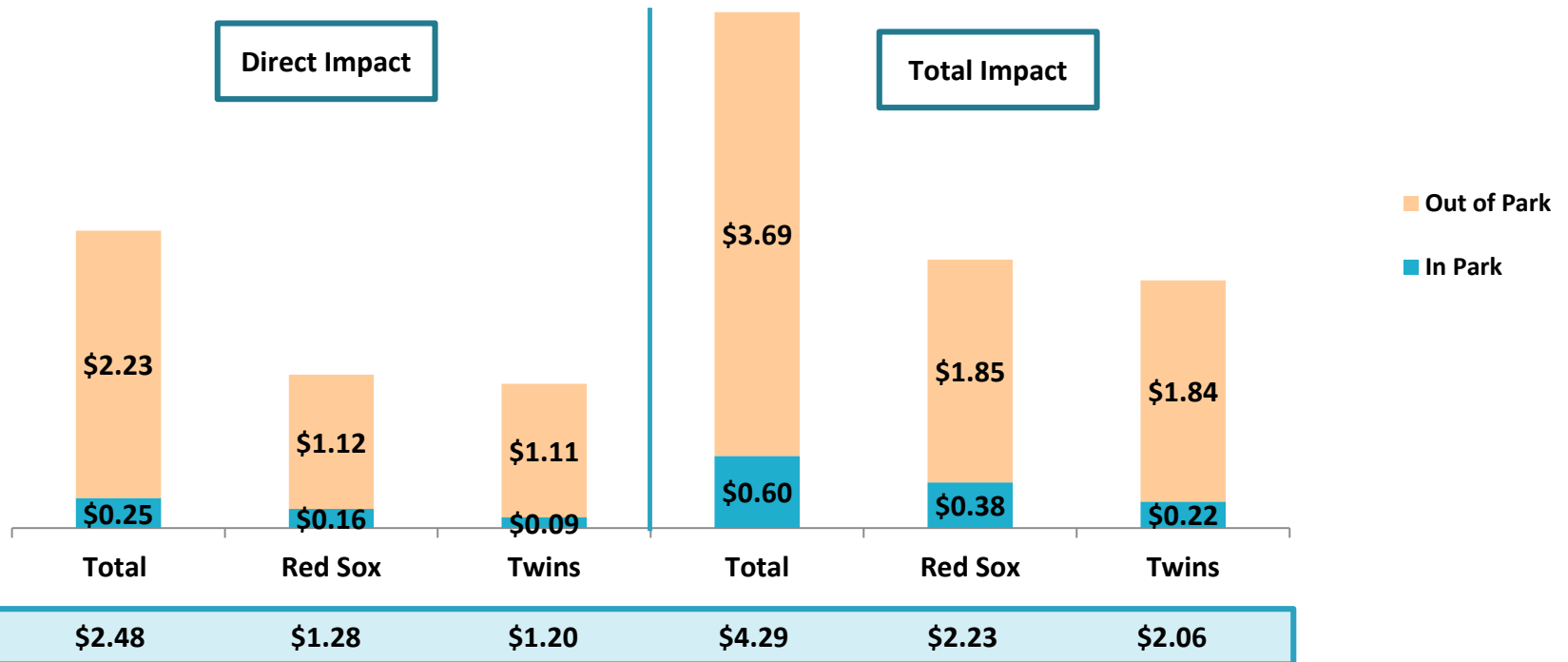
STATE GOVERNMENT REVENUE

These are taxes paid to Florida state government. They include sales tax and any operating income for state government agencies.

Local Government Revenue Impact: All Visitors

- ▶ Spring training attendees' expenditures generate \$2.5 million in local government revenues directly, with a total of \$4.3 million generated.

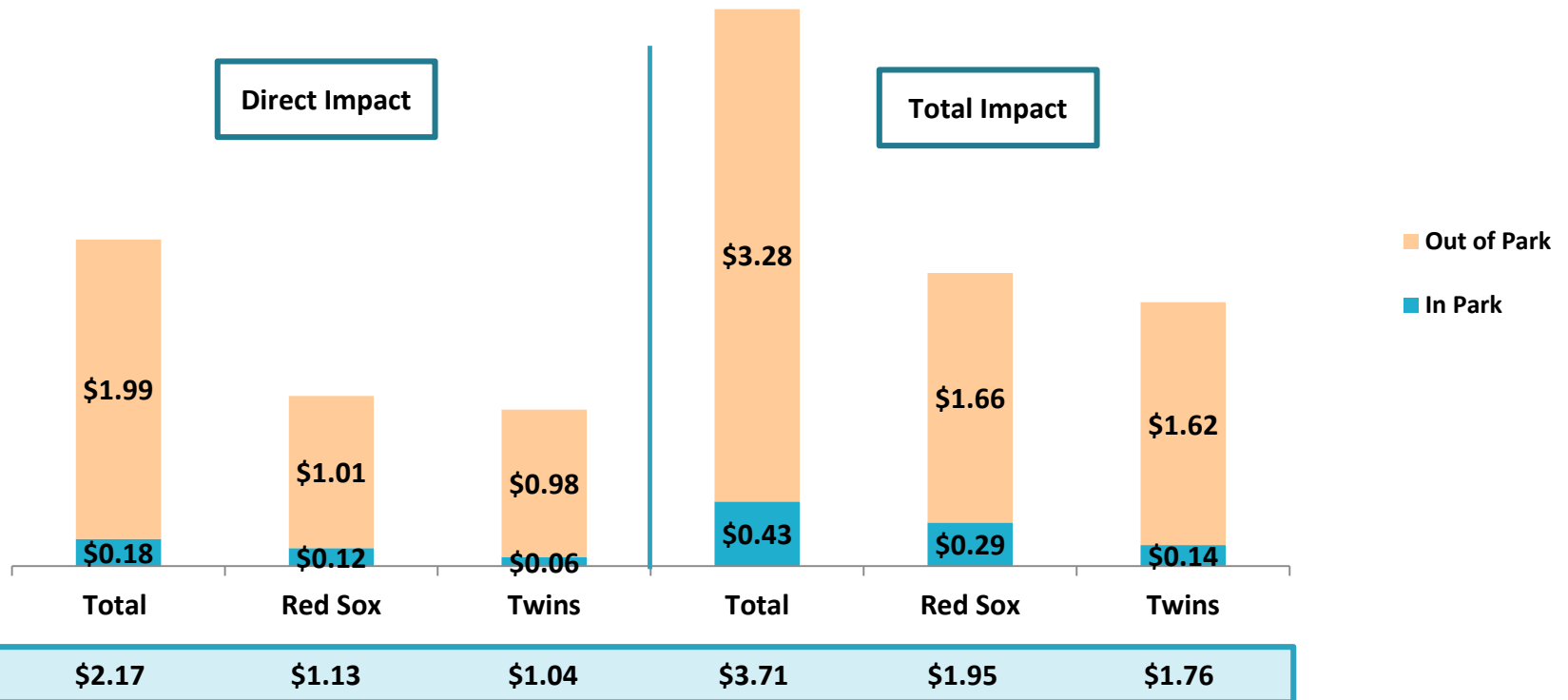
Impact of Estimated Visitor Expenditures on *Local Government Revenues*
(\$ millions)



Local Government Revenue Impact: Spring Training Primary Reason for Trip

- Attendees in Lee County specifically to attend spring training generate \$2.2 million in local government revenues directly, with a total of \$3.7 million generated.

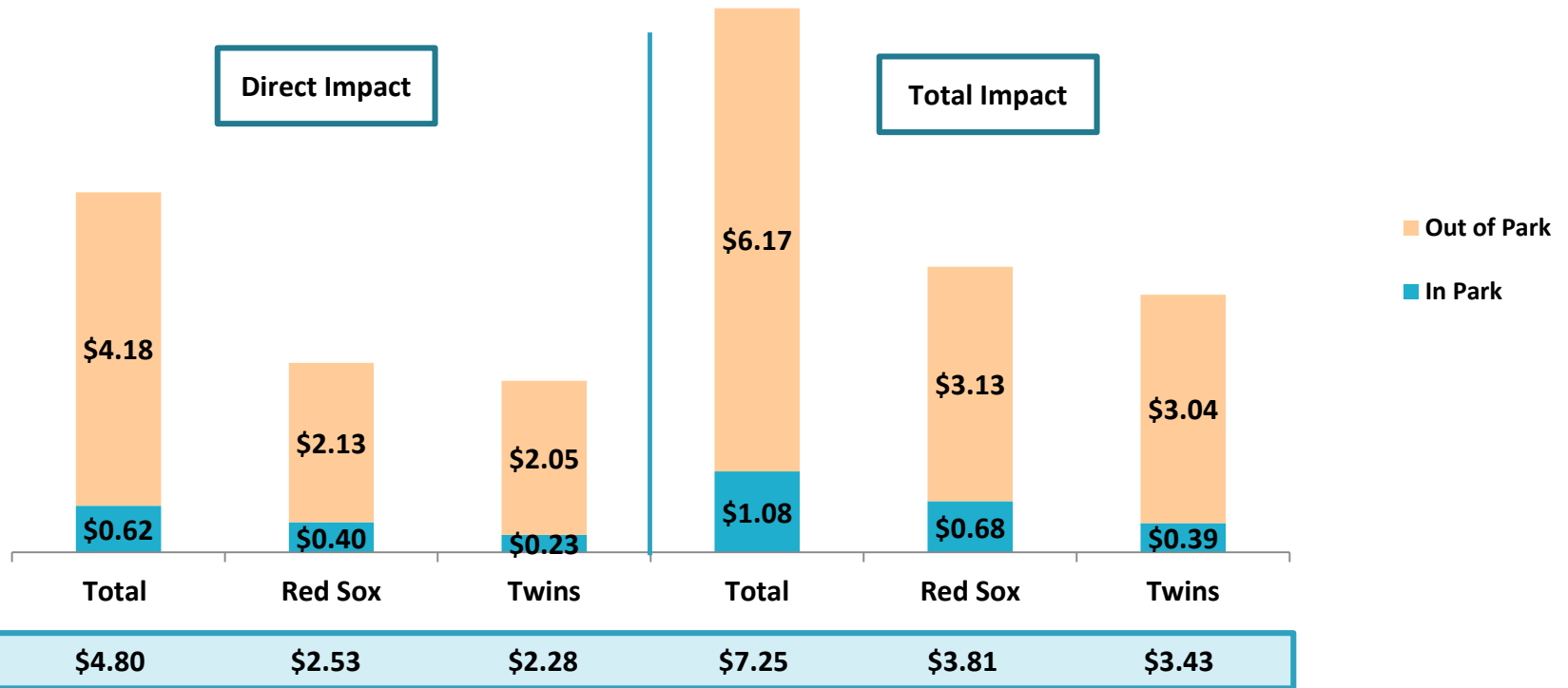
Impact of Estimated Visitor Expenditures on *Local Government Revenues*
(\$ millions)



State Government Revenue Impact: All Visitors

- ▶ Spring training attendee expenditures directly generate \$4.8 million in state government revenues, with a total of \$7.3 million generated after additional rounds of spending.

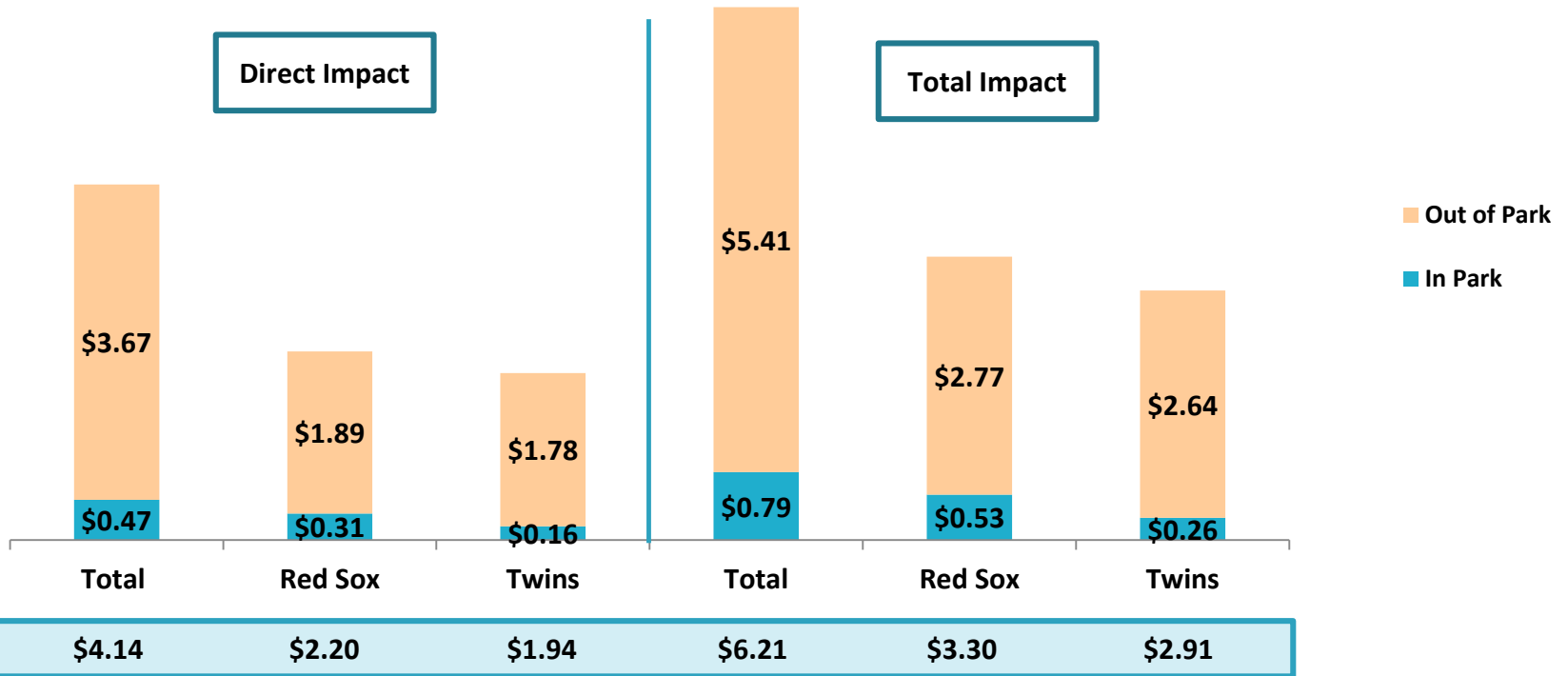
Impact of Estimated Visitor Expenditures on *State Government Revenues*
(\$ millions)



State Government Revenue Impact: Spring Training Primary Reason for Trip

- Attendees in Lee County specifically to attend spring training directly generate \$4.1 million in state government revenues, with a total of \$6.2 million generated overall.

**Impact of Estimated Visitor Expenditures on State Government Revenues
(\$ millions)**





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