



Lee County 2009 Spring Training Study

Prepared for:

Lee County Visitor and Convention Bureau

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1.0 Introduction

Background

Lee County now hosts two teams for spring training – the Boston Red Sox at the City of Palms Park and the Minnesota Twins at the Lee County Sports Complex/Hammond Stadium. By 2012, the Red Sox will have a new stadium in Lee County, leaving the City of Palms without a major league team. In order to determine whether a third team will be recruited, it is important to understand how much the attendees of the current two teams' games contribute to the Lee County economy. It is toward that end that this study is directed.

Research Objectives

The goal of the study reported here has been to assess the impact of spring training attendees on Lee County's tourism revenues. The major league teams contribute in many other ways to the Lee County economy – housing and food for players, coaches and office personnel in residence in Lee County, expenses for reporters and their media support staffs for covering spring training games and their players, etc. However, a major impact on Lee County is the contribution of those non-residents who attend the spring training games. The purpose of this study is to estimate the impact of these visitors. In meeting that goal, the following objectives have been addressed:

- ❖ To estimate the number of non-year-round residents attending spring training games/practices in Lee County and the amount of money they spend in the process;
- ❖ To examine the number of visitors and money spent by those in Lee County primarily to attend spring training;
- ❖ To explore the role of spring training on attendees' initial visitation, repeat visitation and home purchase in Lee County;
- ❖ To profile the visitors attending spring training and their trips to Lee County; and
- ❖ To compare and contrast the profiles and impacts of the two teams now holding spring training in Lee County.

Methodology

Data Collection

In order to examine the contribution of spring training attendees to Lee County, Davidson-Peterson Associates conducted on-site interviews with a sample of non-resident attendees at **all** home games in the County as well as seven Red Sox practices and one Twins practice. A total of 1160 interviews were completed – 589 with those at Red Sox games and practices and 571 at Twins games and practice. An average of 15 interviews were collected each practice and 25 to 37 per game.

Interviewers were stationed in specific locations where they would be able to stop and speak with a sample of attendees. A single adult individual from a travel party would be stopped and asked if he/she were a resident of Lee County for more than six months per year. He/she was then asked how many members of the party were residents/non-residents. If any individuals were non-residents, an adult (over 18) would be invited to participate by completing a questionnaire.

Copies of both the screening form and the self-administered questionnaire may be found in the appendix to this report.

Data Processing

Completed questionnaires were sent to Davidson-Peterson Associates for processing. First, they were checked for completeness and incomplete questionnaires removed. Then, the coding department scanned the questionnaires into a data base.

Upon completion of the basic data processing, estimates of total expenditures by non-resident attendees at the Twins and Red Sox events were calculated, individually and combined. To do so, we weighted our data by total attendees minus the proportion of resident attendees estimated by responses to the screening questionnaire.

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

	<u>Total</u>	<u>Red Sox Games</u>	<u>Twins Games</u>
Usable questionnaires	1,154	483	550
	%	%	%
Residents	27	27	28
Non-residents	73	73	72
Total attendees*	264,104	134,515	129,589

An additional 121 interviews were conducted at practices (106 at Red Sox practices and 15 at Twins Practices), accounting for the remainder of the 1,154 usable interviews ($483 + 550 + 121 = 1,154$).

Using the estimated total non-resident expenditures by spending category, economics consultant Dr. William Schaffer, Georgia Tech University, calculated the impact of these expenditures on Lee County using an input/output model specifically created for the County.

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

2.0 Executive Summary

The goal of the study reported here has been to assess the impact of spring training attendees on Lee County's tourism revenues. The major league teams contribute in many other ways to the Lee County economy – housing and food for players, coaches and office personnel in residence in Lee County, expenses for reporters and their media support staffs for covering spring training games and their players, etc. However, a major impact on Lee County is the contribution of those non-residents who attend the spring training games.

From the period beginning on February 18, 2009 and ending on April 4, 2009, Davidson-Peterson Associates conducted on-site interviews at spring training practices and games in Lee County. A total of 1,154 usable surveys were completed during that time period, with 483 at Red Sox home games, 106 at Red Sox practices, 550 at Twins home games, and 15 at Twins practices. The results of these questionnaire responses were analyzed to gain insight into the people who attend spring training games and their economic impact on Lee County.

Hosting spring training activities has a positive impact on the Lee County economy. Visitors to the Fort Myers area attending Spring Training contribute more than \$47 million to the Lee County economy. This includes more than \$12 million spent *shopping* and more than \$11 million on *food and beverages*. These dollars represent a conservative estimate that does not include spending at the parks or on tickets, as these expenditures tend to stay with the teams themselves. Also excluded is spending during the weeks in February where teams are practicing but not playing games in Lee County.

Spring training activities are an important draw in influencing travelers to choose to visit Lee County. More than half of those attending spring training activities came to the Fort Myers area for the primary purpose of attending spring training (57%). An additional one in ten consider spring training to be either *absolutely essential* or *extremely important* in deciding on Lee County as a destination for their trip (11%).

The expenditures of only those visitors who identify spring training as the *primary reason* for their trip, or that spring training is either *absolutely essential* or *extremely important* account for more than \$41 million – the majority of the total dollars spent by spring training attendees.

The economic impact of expenditures on Lee County is substantial. As a result of the \$41 million spent by those in Fort Myers because of spring training, there is a total impact of 863 jobs, \$21.0 million in household income, \$2.3 million in local government revenue and \$4.4 million in state government revenue supported by these expenditures.

There is an interesting dichotomy with length of stay among those attending spring training in Fort Myers. A sizable proportion of those attending spring training are day trippers (27%), although this group is balanced by the large number who are staying in the Lee County area for longer periods of time. Not surprisingly, given the number of both day trippers and those staying longer, spring training attendees are more likely than general visitors to arrive in a personal vehicle and less likely to fly to the Fort Myers area.

Importantly, most of those staying overnight in the Fort Myers area to attend spring training stay in paid accommodations, including many who stay in hotel/motel/resort lodgings.

Spring training attendees are often frequent visitors to the County. More than half of those attending spring training games and practices in 2009 had been to spring training in Fort Myers previously. Also significant is the fact that most plan to return to spring training both next year and in future years.

Spring training attendees also visit Lee County during other times of the year. Although spring training is often the reason for a visit to Lee County during March, with more than half saying spring training is the primary reason they first came to Lee County during spring training, about half also plan to visit Lee County at other times of the year both next year and in future years.

Spring training activities draw in visitors who are fans of the home teams as well as fans of baseball in general. Not surprisingly, a strong majority of those attending spring training in Fort Myers are fans of the two teams located in Fort Myers, the Boston Red Sox and the Minnesota Twins. Nearly all of those attending consider themselves to be baseball fans, with nearly all identifying themselves as at least casual fans.

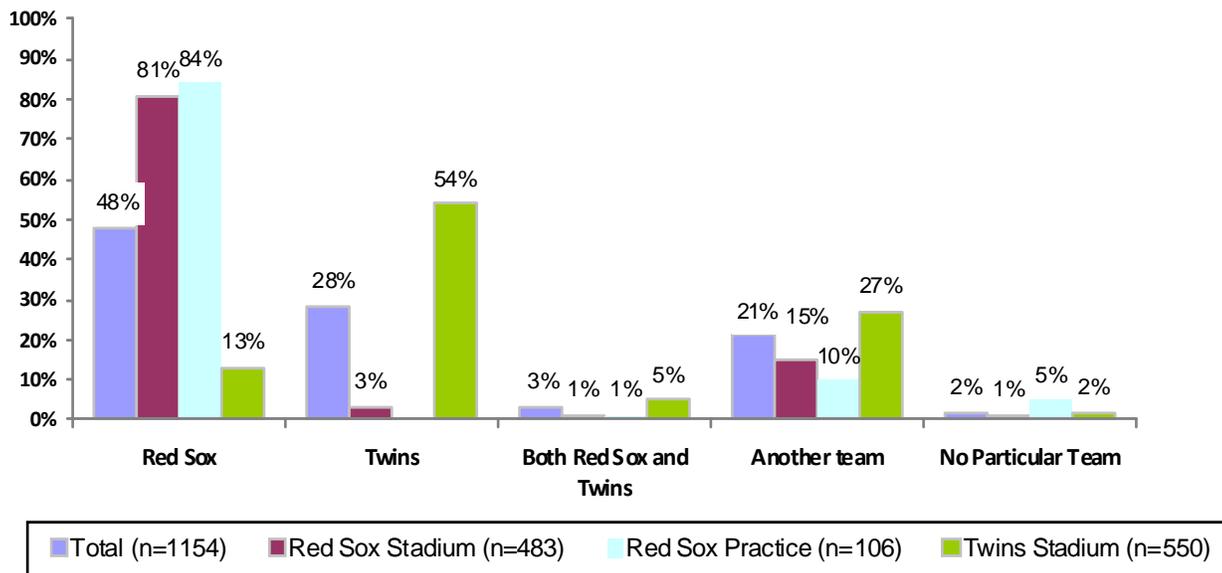
3.0 Demographic Profile of Spring Training Attendees

Not surprisingly, three out of four spring training attendees in Lee County are fans of one of the teams located in Fort Myers, the Boston Red Sox or the Minnesota Twins.

About half of the spring training visitors to Hammond Stadium and City of Palms Park identify themselves as Red Sox fans. Four out of five of those attending games at City of Palms Park are followers of the home Boston Red Sox, with a similar pattern at Red Sox practices.

At Hammond stadium, home of the Minnesota Twins, only about half identify themselves as fans of the home team.

Fan Profile

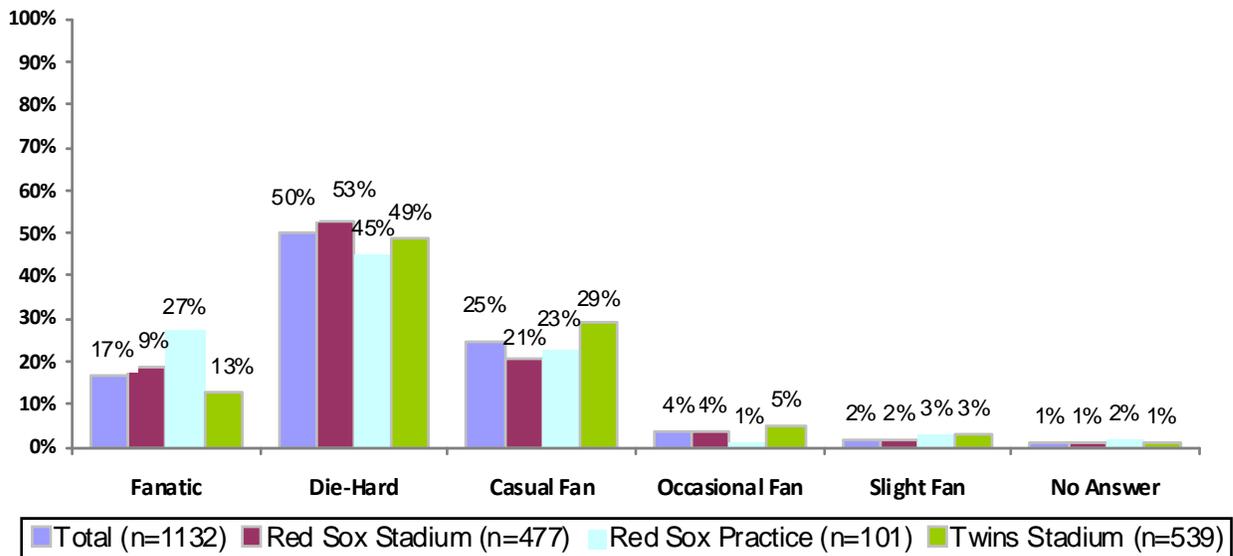


Q1. Which Major League Baseball team(s) do you follow most closely?

The people who are choosing to attend spring training games in Fort Myers and follow a specific team are people who tend to be real fans of the game of baseball.

Not surprisingly, the vast majority of those attending spring training that follow a particular team consider themselves to be at least casual fans (92%), with two thirds ranking themselves as die-hard fans or fanatics (67%).

Type of Fan



Q2. What type of fan would you consider yourself? (asked only of those choosing a team in Q1)

While spring training attendees tend to be older than the March visitors encountered in Lee County's ongoing monthly Visitor Profile Survey (46.9), part of the explanation is the number of 18 to 22 year old spring break visitors found on the beaches of Lee County during the month of March. Spring training visitors (52.7) are closer in age to the average winter Lee County visitors' age of 51.3. Those who attend Red Sox practice are younger (46.8 on average) than are those who attend Red Sox games (51.8). This is not surprising as Red Sox practices take place in February, when many northeastern states have school vacations. Those attending games at Twins stadium tend to be older than those attending Red Sox home games.

Average party size is three, which is similar to what we find in the monthly study, although parties attending baseball games and practices tend to include slightly more children under 18 than do general Lee County visitor parties.

Estimated mean household income for spring training visitors is similar to that among the general population of March visitors. Those attending Twins home games have a slightly higher mean household income than do those at City of Palms Park, which may be a function of their slightly older age.

Demographic Profile

	March 2009 General Visitors	Total Spring Training	Red Sox Stadium	Red Sox Practice	Twins Stadium
	(n=220)	(n=1154)	(n=483)	(n=106)	(n=550)
Age					
Average	46.9*	52.7	51.8	46.8	54.5
Travel Party Size					
Average	2.8	3.1	2.9	3.5	3.2
Children (under 18)					
Average #	.3	.5	.4	1.1	.5
Household Income					
Estimated Mean	\$93,815	\$93,889	\$92,146	\$92,241	\$96,166

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?

*Note: March age figures tend to be lower than other winter season months due to spring break attendees visiting the beaches. The average age of winter visitors from January-March for 2009 is 51.3.

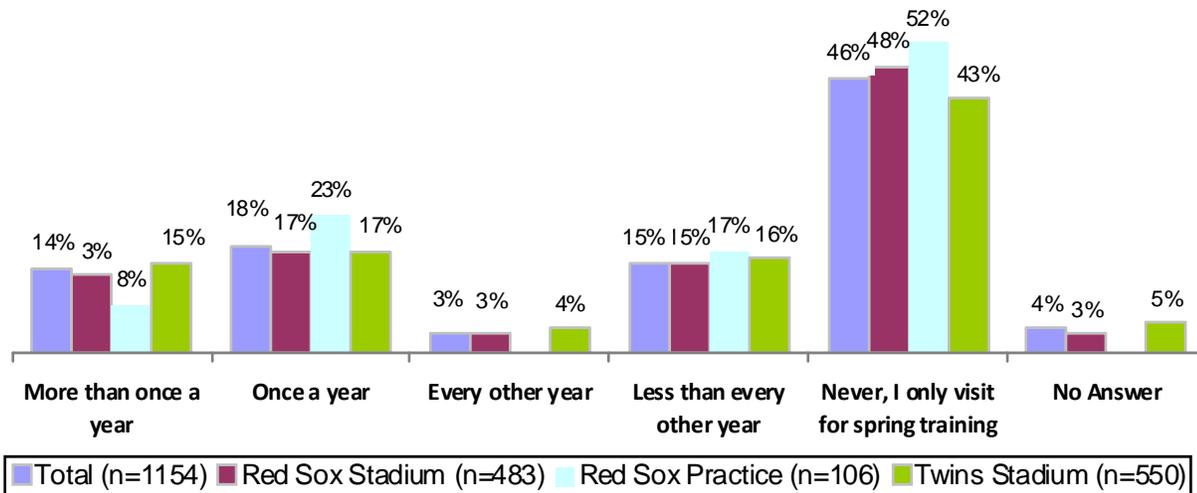
Not surprisingly nearly all attendees at spring training in Fort Myers hail from the United States (98%). It is also not surprising that seven out of ten spring training attendees are from either the Midwest (37%) where the Twins play or from New England (33%) where the Red Sox play. Attendees are also frequently from the home states of the two teams based in Fort Myers -- Minnesota (23%) and Massachusetts (18%). Each team's home stadium is more likely to be filled with visitors from their home region, with Hammond stadium hosting visitors from Minnesota and the Midwest and City of Palms Park filling up with visitors from Massachusetts and New England.

	March 2009 General Visitors	Total Spring Training	Red Sox Stadium	Red Sox Practice	Twins Stadium
	(n=220)	(n=1154)	(n=483)	(n=106)	(n=550)
Region					
United States	83%	98%	98%	97%	97%
Canada	9%	2%	2%	3%	2%
New England	21%	33%	55%	66%	9%
Midwest	47%	37%	12%	4%	63%
Massachusetts	11%	18%	30%	38%	3%
Minnesota	12%	23%	2%	--	45%

Q27. Are you currently a resident of:

Half of those attending spring training games in Ft. Myers come to the area only for spring training (46%). One-third of visitors also visit Lee County at least one time each year (32%).

Typical Frequency of Visiting Fort Myers



Q24. How often do you visit the Ft. Myers area when spring training is not being held?

4.0 Trip Profile

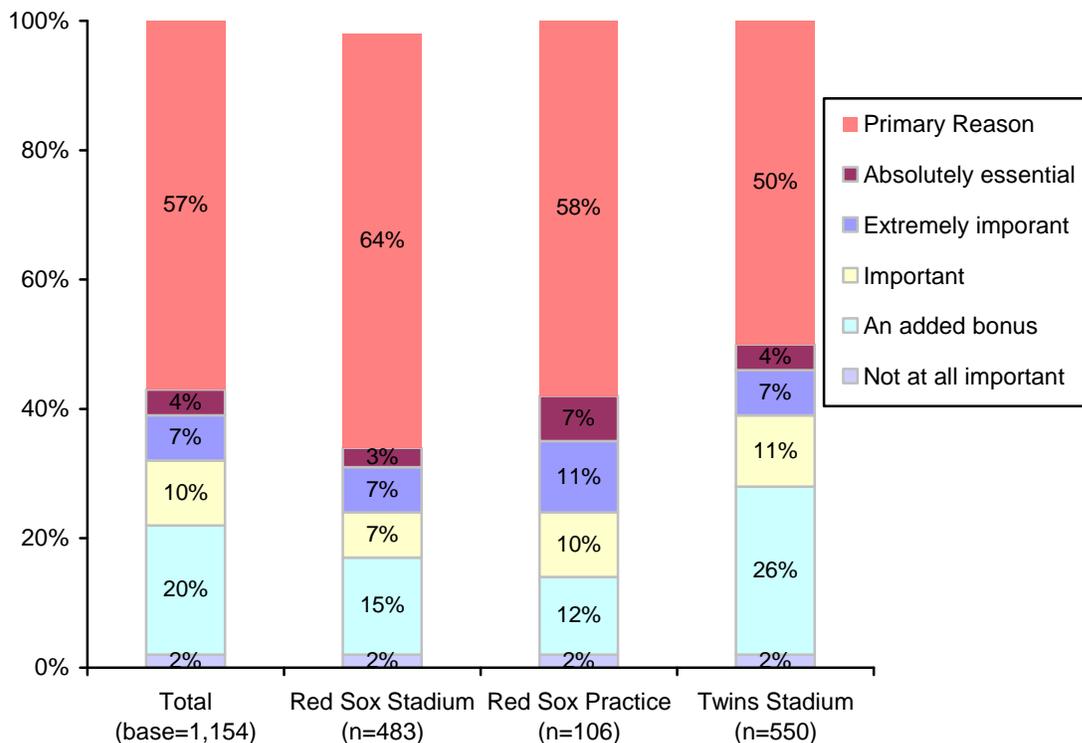
A majority of attendees of spring training games come to Lee County for the primary reason of attending spring training. Red Sox attendees are more likely to come for the primary reason of spring training (64%) than are the Twins attendees (50%).

Purpose of Trip

Primary Reason in the Ft. Myers Area	March 2009 General Visitors	Total Spring Training	Red Sox Stadium	Red Sox Practice	Twins Stadium
	(n=220)	(n=1154)	(n=483)	(n=106)	(n=550)
To attend spring training	N/A	57%	64%	58%	50%
Leisure/pleasure trip (vacation)	87%	25%	18%	10%	33%
Visiting friends/relatives	38%	13%	14%	23%	11%
Personal Business	1%	1%	1%	3%	1%
Business Trip	1%	1%	<1%	--	1%
Convention/Trade show/Conference	N/A	--	--	--	--
No Answer	--	4%	4%	7%	4%

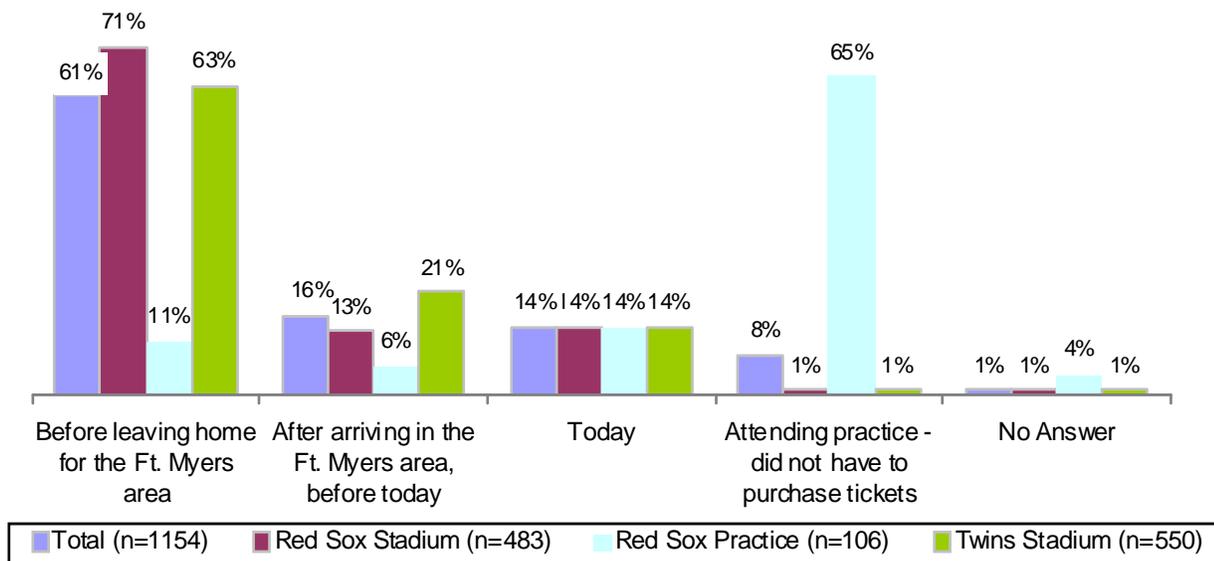
Q11. What is the primary reason you came to the Ft. Myers area on this trip? Please check only one response. (Note: for the monthly visitors survey more than one selection is allowed)

Spring training is regarded as an important factor in attendees choosing Lee County as a destination for their trip, even if it was not the primary factor. Only two percent say that spring training was *not at all important* in choosing to come to the Ft. Myers area, while two out of three list spring training as either the *primary reason* for the trip, or *absolutely essential* or *extremely important*.



Q12. When selecting the Ft. Myers area as your destination for this trip, how important was attending spring training events to your decision?

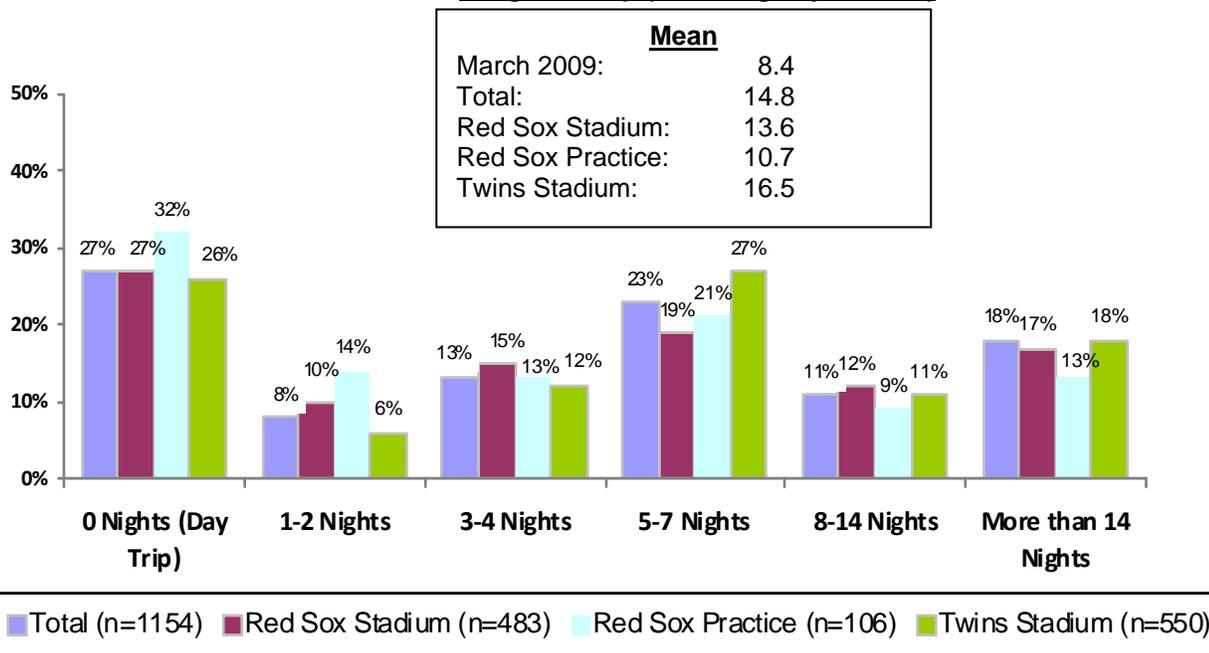
A majority of attendees purchase their tickets for spring training games *before leaving home for the Ft. Myers area*. Far fewer purchase tickets on the day of the game (14%), further evidence that attending games is an important part of the trip that is planned for in advance.



Q3. When did you purchase tickets for this game?

About one quarter of spring training attendees are day trippers (27%). The balance spend at least one night in the Fort Myers area (73%). Including all spring training tourists, an equal number stay for five nights or more (51%) as stay less than five nights in the Fort Myers area (49%). Nearly one in five will stay in the Fort Myers area for more than two weeks (17%). This sizable cohort of longer-term visitors drive up the mean length of trip (14.8) considerably over the March 2009 visitor profile figure (8.2), even with the high number of day trippers included.

Length of Trip (including day visitors)



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

*Note: Means are skewed upwards due to respondents who visit for the season (i.e. for over 30 days). Means including day trippers are: March 2009 Visitor Profile – 8.4 days; Total Spring Training – 14.8 days; Red Sox Stadium - 13.6 days; Twins Stadium – 16.5 days.

Of those spring training attendees staying overnight in Lee County during their visit, seven out of ten stay in paid accommodations (70%), with nearly half staying in a *hotel/motel* (43%). One in four stays in unpaid accommodations (28%), primarily in the *home of family/friends* (20%).

Half of those attending games in City of Palms Park stay in a *hotel/motel*, while those attending Twins games at Hammond stadium staying in paid accommodations are more split between staying in a *hotel/motel* or a rented *vacation home/condo/cottage*.

Overnight Accommodations Those Staying Overnight:	March 2009 General Visitors	Total Spring Training	Red Sox Stadium	Red Sox Practice	Twins Stadium
	(n=218)	(n=848)	(n=355)	(n=106)	(n=409)
<u>Paid Accommodations (NET)</u>	<u>67%</u>	<u>70%</u>	<u>73%</u>	<u>63%</u>	<u>68%</u>
Hotel/Motel	24%	43%	50%	38%	37%
Vacation home/condo/cottage you rented	27%	18%	14%	13%	21%
Resort	15%	6%	6%	10%	6%
RV park/campground	2%	3%	3%	3%	3%
<u>Free Accommodations (NET)</u>	<u>32%</u>	<u>28%</u>	<u>25%</u>	<u>35%</u>	<u>30%</u>
Home of family/friends	28%	20%	19%	29%	19%
Vacation home/condo/cottage you own	1%	7%	5%	4%	10%
Vacation home/condo/cottage you borrowed	3%	1%	<1%	1%	1%
No Answer	1%	2%	2%	3%	2%

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

Although some spring training visitors stay in most parts of the county, they are most likely to impact Fort Myers. A majority of those spring training attendees who are overnight visitors stay in Fort Myers, (53%) with Fort Myers Beach the next most popular option (16%).

Location of Accommodations	Total Spring Training	Red Sox Stadium	Red Sox Practice	Twins Stadium
	(n=848)	(n=355)	(n=72)	(n=409)
Fort Myers	53%	58%	42%	49%
Fort Myers Beach	16%	12%	13%	20%
Bonita Springs	7%	6%	7%	9%
Cape Coral	7%	7%	14%	6%
North Fort Myers	6%	7%	7%	4%
Sanibel & Captiva Islands	5%	4%	10%	6%
Lehigh Acres	2%	1%	3%	2%
Pine Island	2%	3%	3%	<1%
Estero	1%	<1%	--	2%
Boca Grande & Outer Islands	--	--	--	--
Outside of Lee County	--	--	--	--
No Answer	2%	1%	3%	2%

Q16. Where in the area are you staying?

Half of those attending spring training games fly to the Fort Myers area (50%). Not surprisingly given the greater concentration of both day trippers and longer-term visitors, four in ten travel to the area by *driving a personal vehicle* (39%), more than is true for the typical Lee County March visitors.

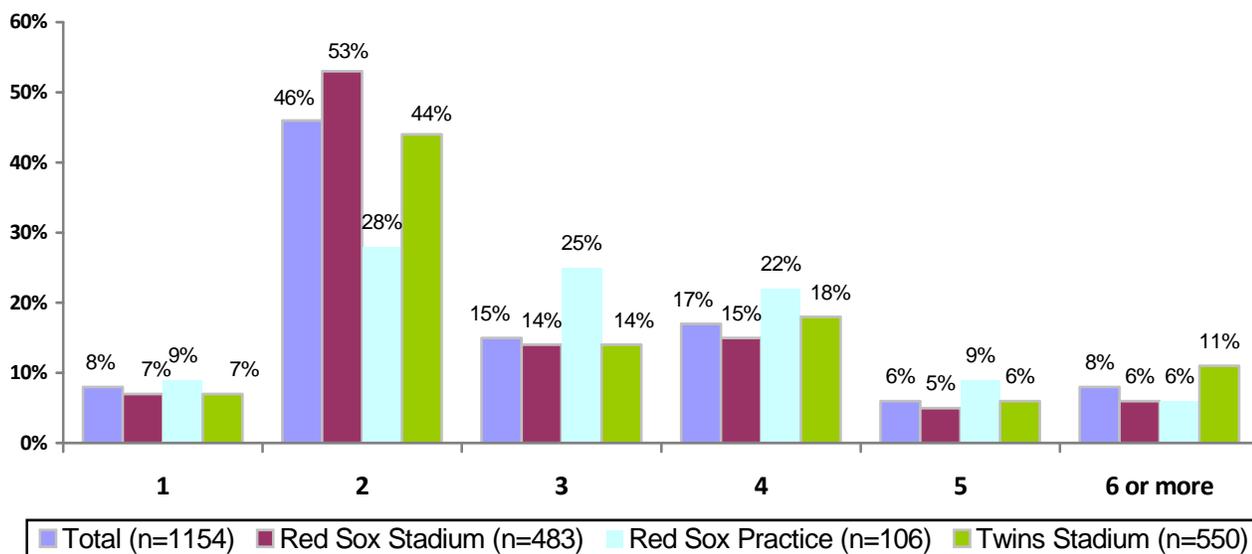
Mode of Arrival	March 2009 General Visitors	Total Spring Training	Red Sox Stadium	Red Sox Practice	Twins Stadium
	(n=220)	(n=1154)	(n=483)	(n=106)	(n=550)
Fly	65%	50%	49%	34%	55%
Drive a personal vehicle	29%	39%	40%	51%	35%
Drive a rental vehicle	2%	7%	7%	13%	6%
Drive an RV	1%	2%	2%	2%	2%
Travel by bus	N/A	1%	<1%	--	1%
Other/No Answer	2%	1%	1%	--	2%

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

5.0 Ballpark Experience

The average party size for trips to watch spring training is three. About half of those attending the games do so in pairs, although for practices, slightly larger groups are more common. Only about one in ten is traveling to watch baseball in a group of six or more.

Number of people in party



Q4. Including yourself, how many people in your party came out to watch baseball today?

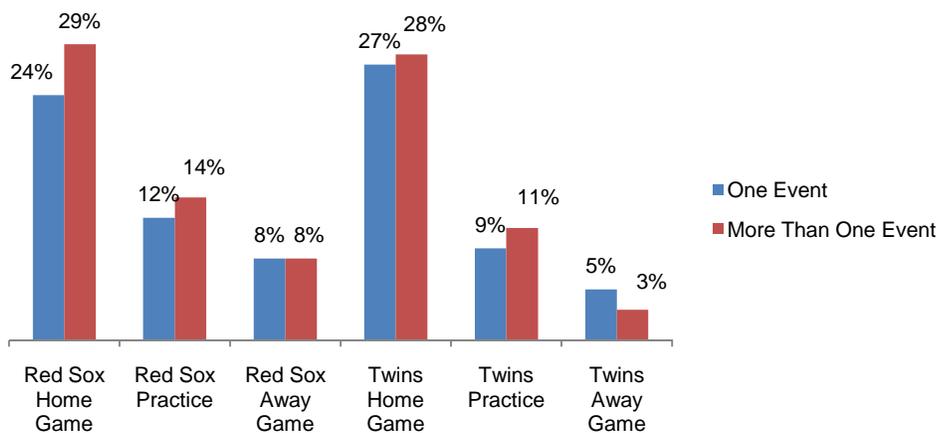
The typical game attendee spends nearly \$50 per person while attending the game. While spending on food and beverages is nearly equal, those attending Red Sox home games tend to spend more than those attending Twins home games, particularly for tickets and souvenirs.

At-Park Expenditures Per Person Per Game	Total Spring Training Game Attendees	Red Sox Stadium	Twins Stadium
	(n=1033)	(n=483)	(n=550)
<u>TOTAL</u>	\$49.04	\$56.40	\$43.25
Tickets	\$25.98	\$28.97	\$23.63
Programs	\$1.04	\$1.16	\$0.94
Food and Beverages	\$10.73	\$11.23	\$10.35
Souvenirs	\$9.93	\$12.57	\$7.86
Other	\$1.37	\$2.46	\$0.51

6.0 Spring Training Visitation Patterns

Many who attend spring training games and practices take advantage of the opportunity to watch baseball on more than one occasion. In fact, for each type of event, visitors are just as likely to have attended or plan to attend more than once as they are to be making just one visit.

Total prior and planned visits to spring training in 2009



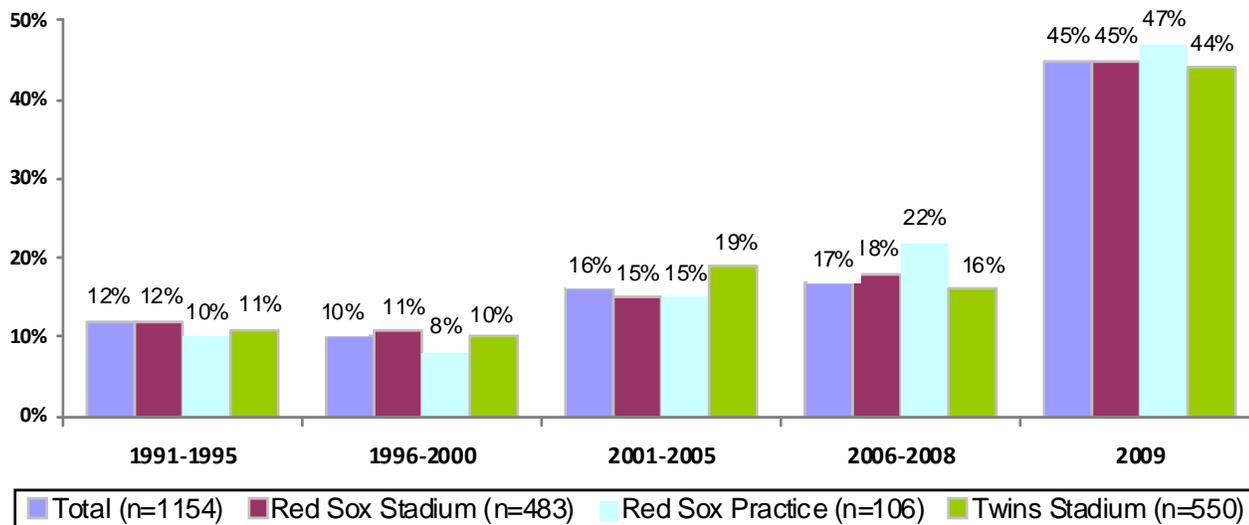
n=1154

Q5. Including today, how many times during this visit to Florida have you attended the following:

Q6. Not including today, how many times during the remainder of your visit to Florida, do you plan to attend the following:

Spring training is a tradition for some visitors, with half of those attending spring training in 2009 having also attended in previous years (55%). Among the 45% who made their initial trip in 2009, about one quarter (26%) say they *definitely* plan to return next year, twice as many as say they will *definitely* or *probably not* return next year (13%).

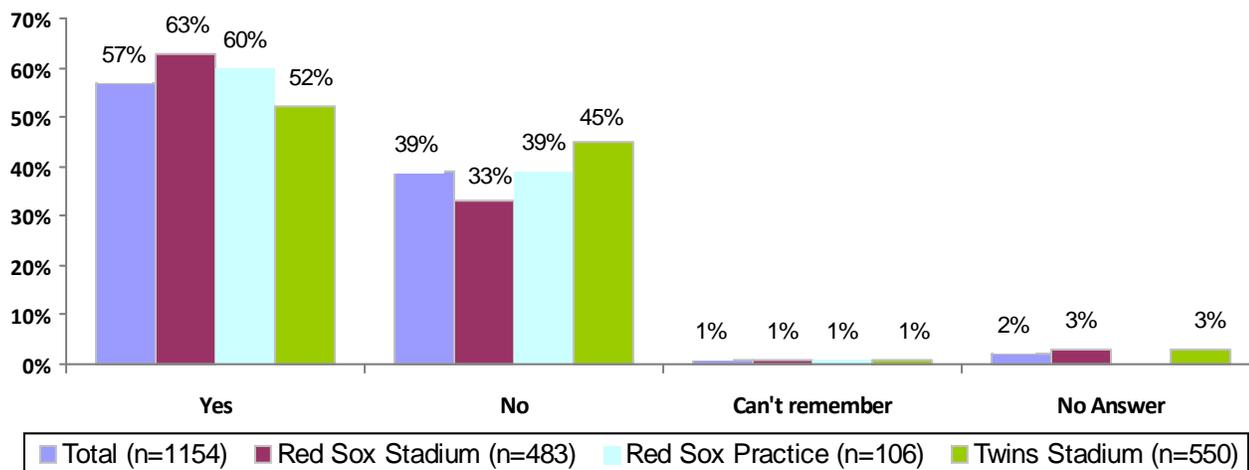
First visit to spring training in Fort Myers



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

Regardless of the year, more than half (57%) made their first visit to Lee County during spring training for the primary reason of attending spring training events.

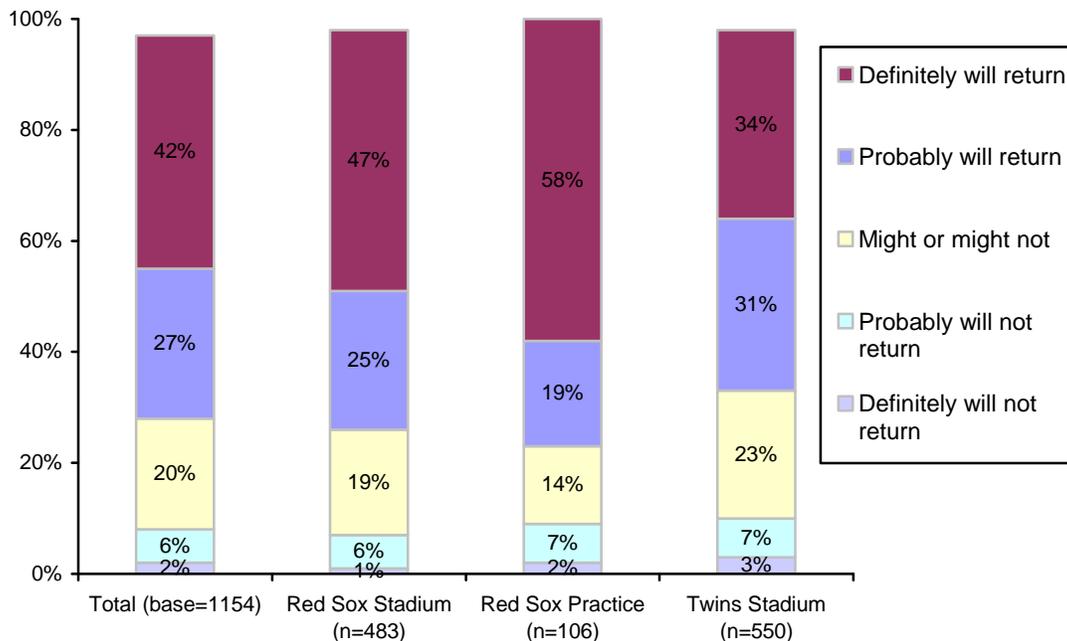
Primary Reason for First Trip to Fort Myers during Spring Training



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

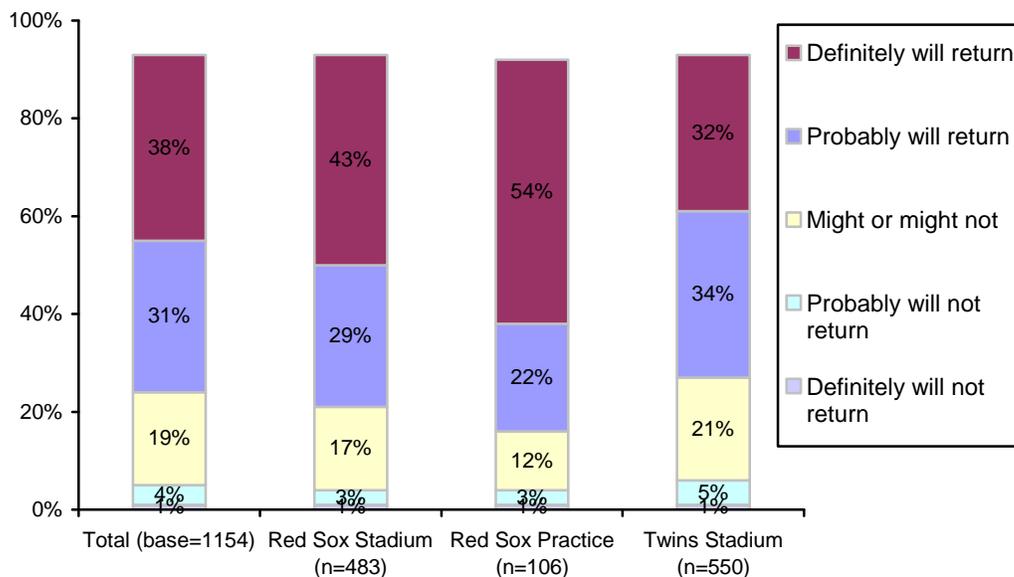
Those attending spring training are likely to say they will return to Fort Myers for spring training both in the next year and in future years. About seven in ten either *definitely* or *probably will return* next year (69%) and in future years (69%).

Intent to return for spring training next year



Q22a. How likely are you to return to the Ft. Myers area for the primary purpose of attending spring training... Next Year (2010)

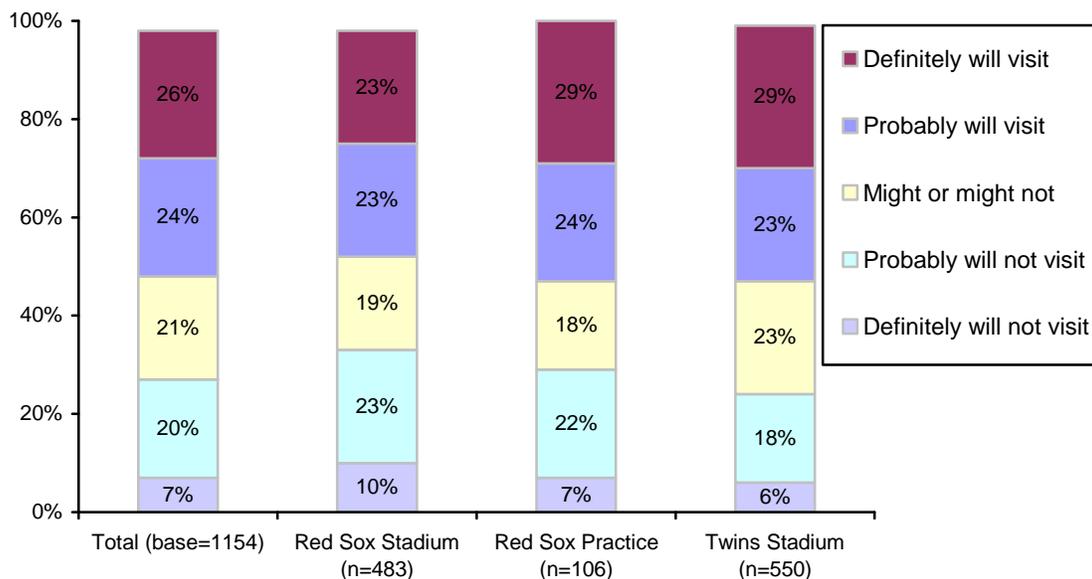
Intent to return for spring training in future years



Q22b. How likely are you to return to the Ft. Myers area for the primary purpose of attending spring training... Beyond Next Year (2011 and later)

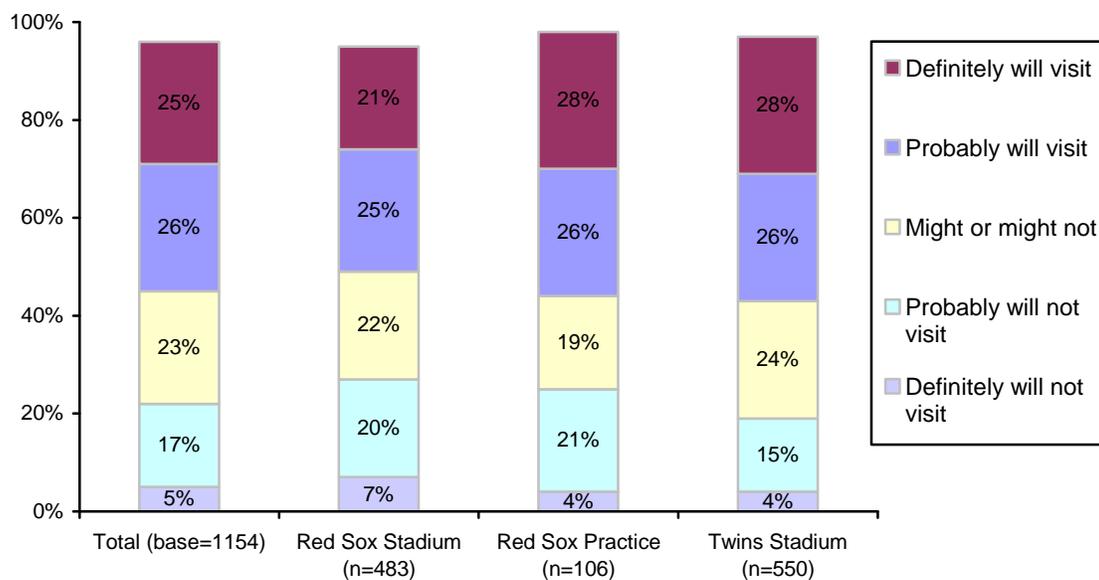
Those attending spring training are often also visitors to Lee County at other times of the year. Half say they either *definitely* or *probably will visit* Lee County for reasons other than spring training both next year (50%) and in future years (51%).

Intent to return at other times of the year – next year



Q23a. How likely are you to visit the Ft. Myers area for reasons other than spring training? Next Year (2010).

Intent to return at other times of the year – future years



Q23b. How likely are you to visit the Ft. Myers area for reasons other than spring training? Beyond next year (2011 and later)

7.0 Economic Impact of Spring Training Visitation

On average, spring training attendees spend \$148.89 per person per day including expenditures at the park. Those attending Red Sox home games at City of Palms Park tend to spend more money per day than those attending Twins games at Hammond Stadium, particularly in the areas of *food and beverages, liquor purchases, other evening entertainment, gaming, licenses/registrations/permits and sweepstakes tickets*. Those attending Twins games tend to spend more money per person per day on *cultural performance admissions*.

Average Expenditures per Person per Day			
	Spring Training		
	Total	Red Sox	Twins
Shopping	\$27.30	\$28.36	\$26.58
Food and Beverages	\$22.36	\$24.43	\$20.92
Lodging and Camping Accommodations*	\$15.20	\$15.56	\$14.95
Ground Transportation	\$11.88	\$13.69	\$12.82
Liquor Purchases	\$3.84	\$4.76	\$3.20
Other Evening Entertainment	\$3.62	\$4.97	\$2.68
Popular Events Admissions	\$2.94	\$3.12	\$2.82
Sport Fees	\$2.88	\$3.02	\$2.79
Gaming	\$2.32	\$3.20	\$1.70
Cultural Performance Admissions	\$2.24	\$1.83	\$2.52
Other Sightseeing/Attractions	\$1.62	\$2.04	\$1.32
Licenses/Regist./Permits	\$1.31	\$2.20	\$0.70
Sweepstakes Tickets	\$1.23	\$2.24	\$0.53
Historic/Cultural Site Admissions	\$0.92	\$1.26	\$0.68
All other	\$0.18	\$0.09	\$0.25
<u>Out of Park Total</u>	<u>\$99.85</u>	<u>\$110.77</u>	<u>\$94.47</u>
In Park Total	\$49.04	\$56.40	\$43.25
TOTAL	\$148.89	\$167.17	\$137.72

*Note: The lodging and camping accommodations per person per day average expenditures are much lower than those reported in the March 2009 Visitor Profile and Occupancy Analysis. This is a result of a large number of spring training attendees not staying in paid accommodations, as well as many staying in rented Condo/Cottage/Vacation Homes for seven nights or more at a lower rate.

The average per-person-per-day expenditures can be used to calculate total Lee County expenditures made by spring training game attendees during their total trip. These figures **exclude** expenditures made at the stadium and on tickets, as the vast majority of that spending goes directly to the teams.

Additionally, these figures are only calculated for spring training games, and therefore **exclude** all spring training expenditures for the time when the teams are practicing in Fort Myers prior to games being played.

The calculation of total expenditures requires multiplying the per-person-per-day expenditures by the number of game attendees, and by a factor for the amount of time spent in Lee County per game.

- ❖ For those who do not consider spring training to be a primary or important purpose for their trip, we only include one day of the trip expenditures – game day.

- ❖ For those who consider spring training to be a primary purpose, or consider it to be *absolutely essential* or *extremely important* in selecting the Fort Myers area, we calculated the average trip length per game that can be attributed to spring training expenditures.
 - First, to avoid attributing the entire trip to spring training for those spending more than 30 days in Lee County, an average trip length is calculated using individual trip lengths capped at 30 days.
 - Second, it is also important to account for the fact that team attendance figures are not able to identify those visitors who attend multiple games. Since many individuals do attend multiple games, we divide the calculated average trip length by the average number of games attended to generate an estimate for the average trip length per game attended (in days).

- ❖ Multiplying spring training average trip length per game attended by the per-person-per-day expenditures and the total attendance allows us to calculate total expenditures for all those attending games.

The table on the following page presents these calculations.

Calculating Spring Training Attendee Expenditures						
Category	Attendance	Average Trip Length (in days)	Average Number of Games Attended	Average Trip Length Per Game (in days)	Per Person Per Day Spending	Game Attendee Direct Spending
Red Sox (Spring Training Primary Reason)	72,577	7.86	3.20	2.46	\$ 119.13	\$ 21,236,978
Red Sox (Other Primary Reason)	26,383			1.00	\$ 101.05	\$ 2,666,002
Red Sox Total	98,960					\$ 23,902,980
Twins (Spring Training Primary Reason)	56,714	8.51	2.49	3.42	\$ 104.89	\$ 20,330,805
Twins (Other Primary Reason)	38,285			1.00	\$ 82.46	\$ 3,156,981
Twins - Total	94,999					\$ 23,487,786

Note 1: Attendance data provided by the Boston Red Sox and Minnesota Twins.

Note 2: For the purposes of estimating attendee expenditures, average trip length (in days) is calculated using individual trip lengths capped at 30 days so that *not more than 30 days* of an individual's trip is attributed to spring training among those who stayed in Lee County longer.

Overall, Red Sox and Twins game attendees in Lee County add more than \$47 million to the Lee County economy. Both those attending Red Sox games and those attending Twins games provide positive contributions to the Lee County economy, with Red Sox attendees accounting for nearly \$24 million in expenditures vs. just over \$23 million for Twins attendees. Expenditures for those attending practice only are excluded due to the lack of available daily practice attendance counts necessary for projections.

Total Expenditures - All Spring Training Attendees			
	Spring Training		
	Total	Red Sox	Twins
Shopping	\$ 12,041,843	\$ 5,630,206	\$ 6,411,637
Food and Beverages	\$ 11,180,225	\$ 5,853,923	\$ 5,326,302
Lodging and Camping Accommodations	\$ 8,770,193	\$ 4,375,858	\$ 4,394,335
Ground Transportation	\$ 5,519,197	\$ 2,769,874	\$ 2,749,323
Liquor Purchases	\$ 1,787,264	\$ 933,390	\$ 853,874
Other Evening Entertainment	\$ 1,557,306	\$ 806,257	\$ 751,050
Gaming	\$ 1,310,152	\$ 688,295	\$ 621,857
Other Sport Fees	\$ 1,274,338	\$ 628,676	\$ 645,662
Events Admissions	\$ 1,004,880	\$ 496,001	\$ 508,879
Other Sightseeing/Attractions	\$ 898,127	\$ 487,617	\$ 410,510
Cultural Performance Admissions	\$ 648,568	\$ 294,011	\$ 354,557
Historic/Cultural Site Admissions	\$ 486,102	\$ 355,065	\$ 131,037
Licenses/Registrations	\$ 483,141	\$ 274,045	\$ 209,096
Lottery Tickets	\$ 375,795	\$ 279,193	\$ 96,602
All Other	\$ 53,637	\$ 30,569	\$ 23,067
TOTAL	\$ 47,390,767	\$ 23,902,980	\$ 23,487,786

In order to gain a better understanding of the role spring training plays in generating these expenditures, it is important to focus on the spending of just those who identify spring training as an important reason for their travel to Lee County. Those spring training attendees who either identify spring training as the primary purpose for their trip, or consider it to be *absolutely essential* or *extremely important* in selecting the Fort Myers area as a destination are responsible for \$41.6 million in total expenditures in Lee County. This represents a significant proportion of total expenditures in Lee County attributable to Red Sox and Twins spring training.

Total Expenditures - Spring Training as Primary Reason			
	Spring Training		
	Total - Primary Reason	Red Sox - Primary Reason	Twins - Primary Reason
Shopping	\$ 10,287,422	\$ 4,852,435	\$ 5,434,987
Food and Beverages	\$ 9,964,109	\$ 5,358,714	\$ 4,605,396
Lodging and Camping Accommodations	\$ 8,152,562	\$ 4,173,237	\$ 3,979,325
Ground Transportation	\$ 4,857,225	\$ 2,444,044	\$ 2,413,181
Liquor Purchases	\$ 1,550,541	\$ 800,420	\$ 750,121
Other Evening Entertainment	\$ 1,308,848	\$ 638,197	\$ 670,651
Gaming	\$ 1,204,731	\$ 609,674	\$ 595,057
Other Sport Fees	\$ 1,089,693	\$ 550,846	\$ 538,847
Other Sightseeing/Attractions	\$ 823,636	\$ 445,668	\$ 377,968
Events Admissions	\$ 764,652	\$ 388,623	\$ 376,030
Cultural Performance Admissions	\$ 450,775	\$ 231,747	\$ 219,028
Historic/Cultural Site Admissions	\$ 439,499	\$ 338,708	\$ 100,792
Licenses/Registrations	\$ 375,351	\$ 185,398	\$ 189,953
Lottery Tickets	\$ 260,680	\$ 188,963	\$ 71,717
All Other	\$ 38,059	\$ 30,305	\$ 7,753
TOTAL	\$ 41,567,783	\$ 21,236,978	\$ 20,330,805

Direct and Indirect Impact of Visitor Expenditures

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 to describe the impact of 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

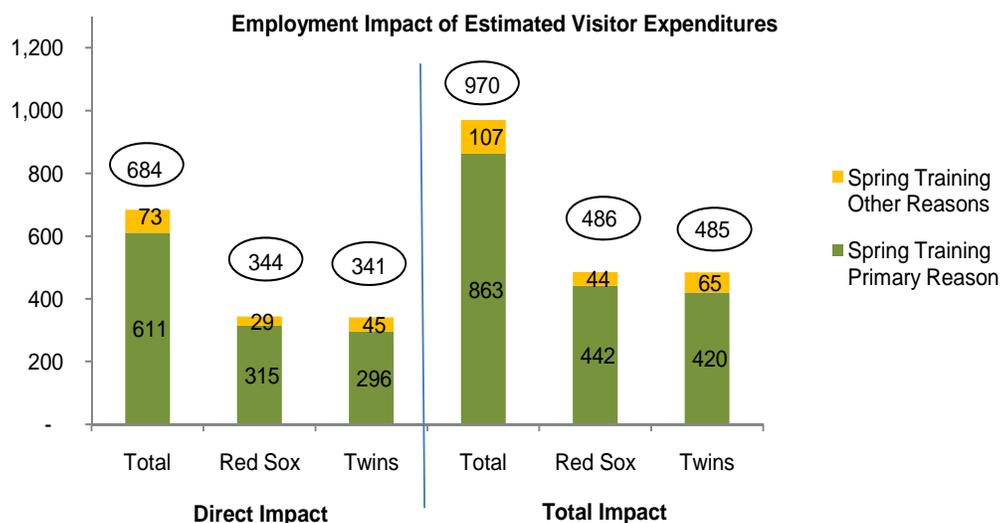
Total impacts are the sum of direct and indirect impacts.

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.

Impact on Jobs for Lee County Residents

Spring Training attendees support 970 jobs in Lee County, 684 through direct impacts.



Explanation

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

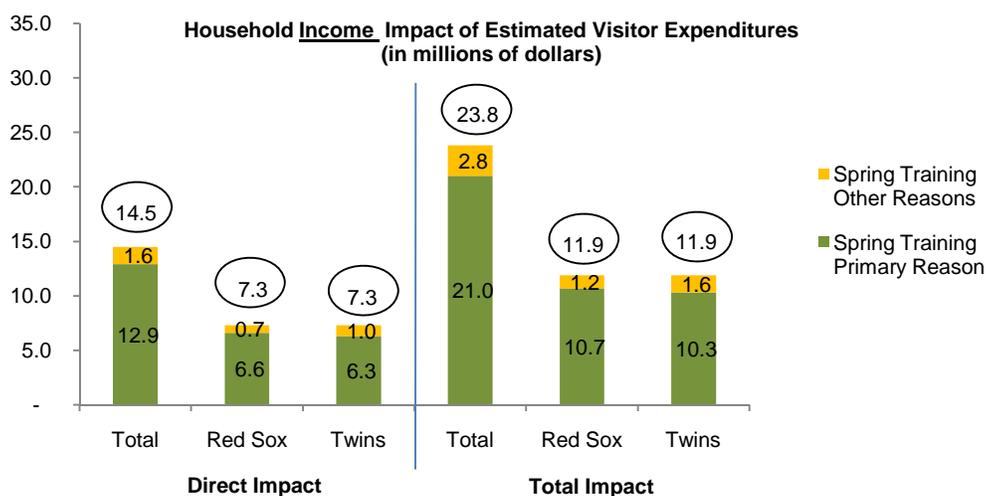
The number of jobs necessary to produce what is purchased with visitor expenditures is the employment impact of the visitor expenditures.

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 the 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.)

Impact on Household Income for Lee County Residents

Attendees of spring training games support \$23.8 million in Lee County household incomes with \$14.5 million directly supported.



Explanation

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.

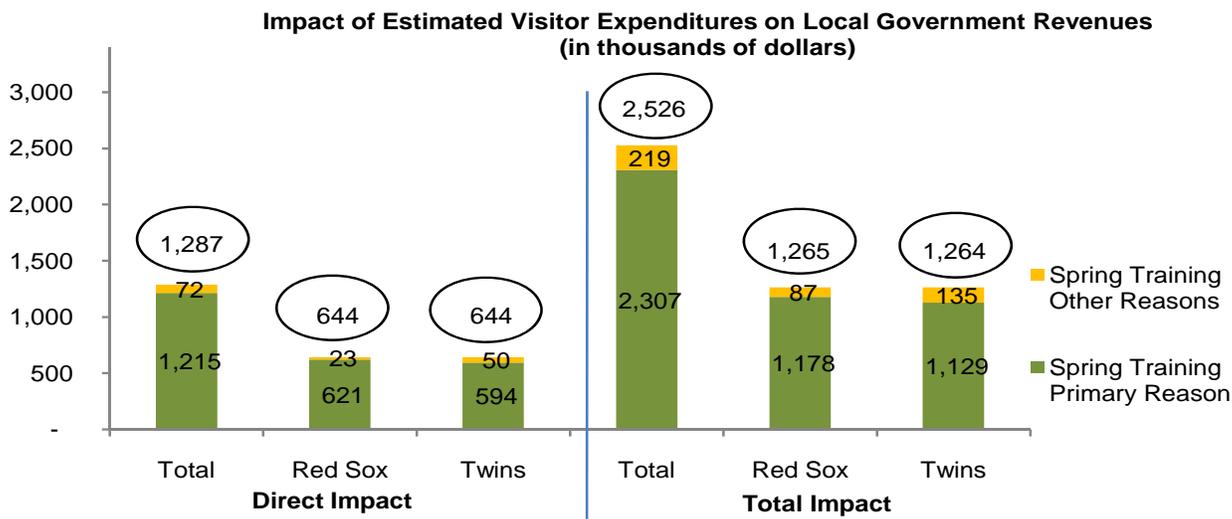
The wages and salaries paid in order to produce what is purchased with visitor expenditures is the household income impact of the visitor expenditures.

Direct household income impact includes the direct wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures.

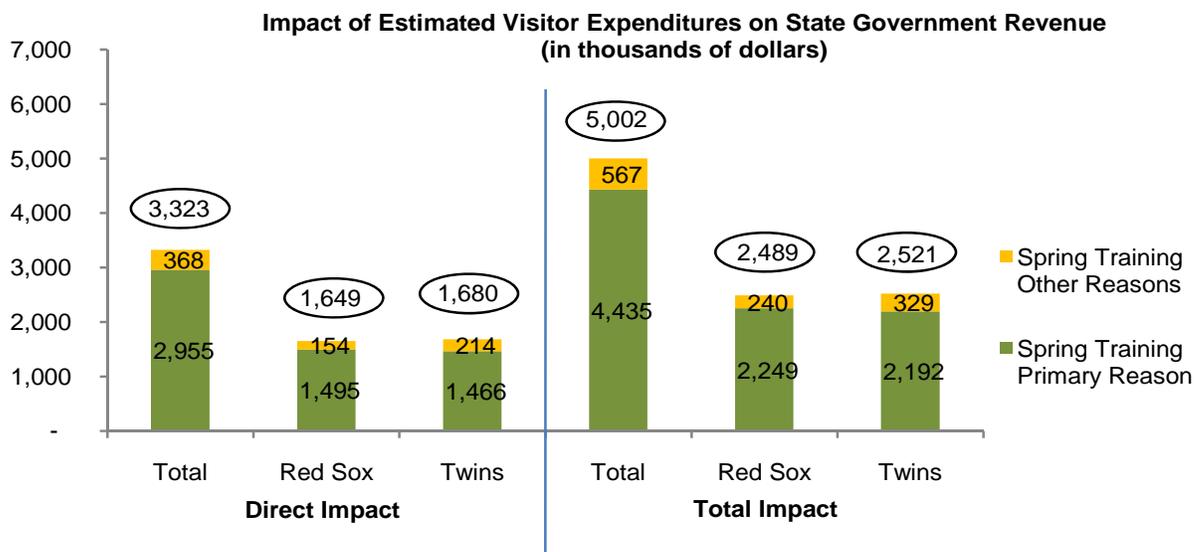
Total household income includes the wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures PLUS the wages and salaries necessary to produce the additional output purchased with the recirculation of money in Lee County. For example, wages brought home 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.)

Impact on State and Local Government Revenues

Attendees of Spring Training generate \$2.5 million in local government revenues, \$1.3 million directly.



Spring Training attendees generate \$5.0 million in state government revenue with \$3.3 million directly supported.



Explanation

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

The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

State government revenue impact is a result of revenues provided to the Florida state government. This includes sales tax and any operating income for state government agencies.

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).

Appendix

Screening Form Ft. Myers Spring Training Survey

Date _____ Time Begun _____ Time Ended _____ Interviewer _____

Total Surveys Completed: _____

Location:

Red Sox Stadium	()	Twins Stadium	()
Red Sox practice fields	()	Twins practice	()

S1. (If necessary) Are you over the age of 18?

Yes () – **Continue with screening**
 No () – **Terminate**

S2. Are you a resident of Lee County, Florida for more than six months a year?

Yes () – **Ask S3a, S4a then terminate**

S3a How many of the people who came with you to watch baseball today are **also residents** of Lee County, Florida for more than six months a year?

Record below

R1																			
R2																			
R3																			
R4																			

S4a How many of the people who came with you to watch baseball today are **visitors** to Lee County?

Record below

R1																			
R2																			
R3																			
R4																			

If there are visitors in same travel party and they are over 18, they may be given a questionnaire, otherwise terminate.

No () – **Ask S3b, S4b then give respondent questionnaire**

S3b How many of the people who came with you to watch baseball today are **residents** of Lee County, Florida for more than six months a year?

Record below

R1																			
R2																			
R3																			
R4																			

S4b How many of the people who came with you to watch baseball today are **visitors** to Lee County?

Record below

R1																			
R2																			
R3																			
R4																			

Give respondent the questionnaire

Spring Training Survey

Dear Spring Training Visitor:

Your visit to our area is very important to us. Please take a few minutes to answer the following questions and return this questionnaire to the person who gave it to you. Thank you very much. *Please make your marks INSIDE the boxes or circles.*

1. Which Major League Baseball team(s) do you follow most closely?

- Red Sox
Twins
Both the Red Sox and Twins
Another team
No Particular Team →Please go to Question 3

2. What type of fan would you consider yourself?

- Fanatic (i.e. watch every game, can identify all players and coaches)
Die-Hard (i.e. watch most games, can identify most of the players and coaches)
Casual Fan (i.e. follow the team when I can, can identify some of the players)
Occasional Fan (i.e. will watch sometimes, can identify the star players)
Slight Fan (i.e. don't really follow often, can identify one or two players)

3. When did you purchase tickets for this game?

- Before leaving home for the Ft. Myers area
After arriving in the Ft. Myers area, before today
Today
Attending practice – did not have to purchase tickets

4. Including yourself, how many people in your party came out to watch baseball today?

- 1 () 2 () 3 () 4 () 5 () 6 () 7 () 8 () 9 or more ()

Your Trip To Ft. Myers

5. Including today, how many times during this visit to Florida have you attended the following:

- | | | | |
|-------------------------------------|-------|-----------------------------------|-------|
| A game at the Red Sox stadium | _____ | A game at the Twins stadium | _____ |
| Red Sox practice | _____ | Twins practice | _____ |
| A Red Sox game elsewhere in Florida | _____ | A Twins game elsewhere in Florida | _____ |

6. Not including today, how many times during the remainder of your visit to Florida do you plan to attend the following:

- | | | | |
|-------------------------------------|-------|-----------------------------------|-------|
| A game at the Red Sox stadium | _____ | A game at the Twins stadium | _____ |
| Red Sox practice | _____ | Twins practice | _____ |
| A Red Sox game elsewhere in Florida | _____ | A Twins game elsewhere in Florida | _____ |

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

Tickets – for today’s game/practice parking/transportation	\$ _____ .00
Programs	\$ _____ .00
Food and beverages at the game	\$ _____ .00
Team hats/clothing or other souvenirs purchased at game	\$ _____ .00
Gas – to and from park	\$ _____ .00
Other items specific to trip (list: _____)	\$ _____ .00

8. 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?

1 () 2 () 3 () 4 () 5 () 6 () 7 () 8 () 9 or more ()

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

1 () 2 () 3 () 4 () 5 () 6 () 7 () 8 () 9 or more ()

10. Please tell us the amount **you and your immediate travel party** spent during **the past 24 hours** in each of the categories listed below while visiting the Fort Myers area. If you have just arrived in this area, please estimate your expenses for the next 24 hours. **PLEASE DO NOT INCLUDE ANY AMOUNTS/ITEMS LISTED IN QUESTION 7.**

Spending Category	Amount Spent
Lodging and Camping Accommodations (Fee for ONE NIGHT). <i>If you have not paid yet, estimate one night’s cost.</i>	\$ _____ .00
Food and Beverages (meals, snacks, groceries, Beer/wine/liquor “by the drink”)	\$ _____ .00
Liquor Purchases (beer/wine/liquor “by the bottle”)	\$ _____ .00
Other Sports Fees (greens fees outfitters, guides, gear rentals)	\$ _____ .00
Events Admissions (popular concerts, festivals)	\$ _____ .00
Cultural Performance Admissions (tickets for theater, classical concerts, dance)	\$ _____ .00
Other Evening Entertainment (movies, clubs, lounges, etc)	\$ _____ .00
Historical/Cultural Site Admissions (historic homes, sites, museums, exhibitions)	\$ _____ .00
Other Sightseeing/Attractions (tours, admissions)	\$ _____ .00
Shopping – Tourist (gifts, souvenirs, antiques, arts and crafts)	\$ _____ .00
Shopping – General (clothing, personal or household items)	\$ _____ .00
Ground Transportation (gasoline, parking, local bus, taxi, car rentals)	\$ _____ .00
Lottery Tickets (scratch-off tickets, etc)	\$ _____ .00
Gaming (gambling and legal betting activity)	\$ _____ .00
Licenses/Registrations/Permits (fishing, hunting)	\$ _____ .00
All Other, Please Explain: _____	\$ _____ .00

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

- To attend spring training () →Please go to question 13
- Visiting friends/relatives ()
- Leisure/pleasure trip ()
- Business trip ()
- Personal business ()
- Convention/trade show/conference ()

12. When selecting the Ft. Myers area as your destination **for this trip**, how important was attending spring training events to your decision?

- Absolutely essential ()
- Extremely important ()
- Important ()
- An added bonus ()
- Not at all important ()

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

None () →Please go to Q17

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

- At a hotel/motel ()
 - At a resort ()
 - At the home of family or friends ()
 - At an RV park or campground ()
 - At a vacation home/condo/cottage – that you rented ()
 - At a vacation home/condo/cottage – that you borrowed ()
 - At a vacation home/condo/cottage – that you own () →Continue with Question 15
- } →Skip to Question 16

15. When 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?

- Absolutely essential ()
- Extremely important ()
- Important ()
- Not very Important ()
- Not at all important ()
- Purchase was made prior to 1991 ()

16. Where in the area are you staying?

- | | |
|---------------------------------|-------------------------------|
| Boca Grande & Outer Islands () | Lehigh Acres () |
| Bonita Springs () | North Fort Myers () |
| Cape Coral () | Pine Island () |
| Fort Myers () | Sanibel & Captiva Islands () |
| Fort Myers Beach () | Outside of Lee County () |

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

Did you:

- Fly ()
- Drive a personal vehicle ()
- Drive a rental vehicle ()
- Drive an RV ()
- Travel by bus ()
- Other ()

Spring Training in general

18. During the past year, have you seen or heard any broadcasts or other media relating to spring training in Ft. Myers?
Please check all that apply.

- TV Game Broadcasts (i.e. NESN, FSN, etc.) ()
- Radio Game Broadcasts (i.e. KSTP, WRKO, WEEI, etc.) ()
- Game Programs at Home Park (i.e. Fenway Park, Metrodome, etc.) ()
- Advertising at Home Park (i.e. Fenway Park, Metrodome, etc.) ()
- Local reporters coverage (when at home) ()
- National coverage (i.e. ESPN, etc.) ()
- Other (Please specify: _____) ()
- None of the above ()

19. In what year did you **first** attend a Spring Training game or practice in Ft. Myers?

- | | | |
|----------|----------|----------|
| 1991 () | 1998 () | 2005 () |
| 1992 () | 1999 () | 2006 () |
| 1993 () | 2000 () | 2007 () |
| 1994 () | 2001 () | 2008 () |
| 1995 () | 2002 () | 2009 () |
| 1996 () | 2003 () | |
| 1997 () | 2004 () | |

20. That first year, was Spring Training the **primary** reason you came to the Ft. Myers area?

- Yes ()
- No ()
- Can't remember ()

21. How many years since that first year have you attended Spring Training in Ft. Myers?

of years attended _____
OR
 Every year since then ()

22. How likely are you to return to the Ft. Myers area **for the primary purpose of attending spring training...**

Next year (2010)

- Definitely will return ()
- Probably will return ()
- Might or might not ()
- Probably will not return ()
- Definitely will not return ()

Beyond next year (2011 and later)

- Definitely will return ()
- Probably will return ()
- Might or might not ()
- Probably will not return ()
- Definitely will not return ()

23. How likely are you to visit the Ft. Myers area for *reasons other than spring training*?

In the next year(2010)

- Definitely will visit ()
- Probably will visit ()
- Might or might not ()
- Probably will not visit ()
- Definitely will not visit ()

Beyond next year (2011 and later)

- Definitely will visit ()
- Probably will visit ()
- Might or might not ()
- Probably will not visit ()
- Definitely will not visit ()

24. How often do you typically visit the Ft. Myers area when spring training is **not** being held?

- More than once a year ()
- Once a year ()
- Every other year ()
- Less than every other year ()
- Never, I only visit for spring training ()

Now, some final questions for classification purposes only. . .

25. What is your age please? _____

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

- | | |
|-------------------------|---------------------------|
| Under \$40,000 () | \$100,000 - \$109,999 () |
| \$40,000 - \$49,999 () | \$110,000 - \$119,999 () |
| \$50,000 - \$59,999 () | \$120,000 - \$129,999 () |
| \$60,000 - \$69,999 () | \$130,000 - \$139,999 () |
| \$70,000 - \$79,999 () | \$140,000 - \$149,999 () |
| \$80,000 - \$89,999 () | \$150,000 and over () |
| \$90,000 – \$99,999 () | |

27. Are you currently a resident of:

- United States () → Please enter home zip code: _____
- Canada ()
- UK ()
- Germany ()
- France ()
- Latin America ()
- Other () → Please specify: _____

For validation purposes only, we will randomly contact participants to verify their answers. Results will not identify you with your answers and all answers will be reported in total. Your personal information will never be sold or used for marketing. Please provide us with the following information.

Name: _____ Phone Number: (____) _____

***Thank you for taking the time to complete this questionnaire.
Davidson-Peterson Associates, 201 Lafayette Center, Kennebunk, ME 04043***