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2018 MLB SPRING TRAINING ECONOMIC IMPACT STUDY



FloridaGrapefruitLeague.com

EXECUTIVE SUMMARY



The 2018 Florida Grapefruit League generated an **economic impact of \$687.1 million** for the State of Florida. The Florida Grapefruit League takes place annually during the Major League Baseball (MLB) Spring Training season and features 15 MLB teams in 12 cities.

The 2018 Florida Spring Training Economic Impact Study was completed by Tallahassee-based Downs & St. Germain Research to determine the Grapefruit League's overall economic impact, including number of attendees, jobs created, and the overall associated wages for employees.

The study showed a **61% increase** from the adjusted total of the last study completed in 2009. The new methodology accounted for fans who attended multiple games during Spring Training not previously included in the 2009 study. Approximately **1,500 of the 1,497,306 attended fans were surveyed** to generate the League's economic impact and fan spending throughout the 13 Spring Training ballparks. **Fan spending data was collected during multiple games** at all 15 Florida Spring Training teams' games between February 23 and March 27.

A key finding of the survey showed that of the averaged total of 6,318 fans per game, 70% were from outside of the host teams' local markets (52% out of state; 18% out of county). Those **fans generated nearly \$584 million in economic impact**. In this survey, non-local fans are categorized as individuals who were not residents of the counties in which the 13 ballparks are located.

Downs & St. Germain's findings also showed that **7,152 jobs are created annually by Florida Spring Training**, accounting for \$253.5 million in wages. Fans attending games were responsible for 355,590 paid accommodation room nights at Florida-based lodging destinations. In total, **fans attended an average of 2.9 games**.

The Sunshine State's annual MLB Spring Training continues to connect with fans throughout Florida and the country as those who surveyed **gave their experience in Florida an average 9.3 rating on a 10-point scale**.

86% of fans are making plans to return for the 2019 Florida Spring Training season.

ECONOMIC IMPACT

Overall Impact Profile

\$687,067,100 total economic impact

\$348,417,200 in direct spending

7,152 jobs

\$253,799,400 in earned wages

Total Spending by Fans

\$583,978,800 in economic impact

\$296,436,000 in direct spending

6,084 jobs

\$214,306,300 in earned wages

Spending by MLB Teams

\$103,088,300 in economic impact

\$51,981,200 in direct spending

1,068 jobs

\$39,493,100 in earned wages

	2009	2018	Percent Change
Economic Impact	\$426,573,346	\$687,067,100	+61.1%
Jobs Supported	5,235	7,152	+36.6%
Wages	\$162,087,507	\$253,799,400	+56.6%

DIRECT AND INDIRECT FAN AND TEAM SPENDING

Total Spending

\$583,978,800 in economic impact
\$296,436,000 in direct spending

Out of State Spending

\$480,554,600 in economic impact
\$243,936,400 in direct spending

Team Spending

\$103,088,300 in economic impact
\$51,981,200 in direct spending

Hotel Accommodations

355,590 paid accommodation room nights were to Out of State fans and visitors of the MLB's Florida Spring Training.

Direct Spending by Attendees Breakdown

Accommodations	\$113,670,500
Restaurants	\$60,765,500
Groceries	\$18,081,800
Shopping	\$27,554,300
Entertainment	\$40,732,000
Transportation	\$24,432,400
Other	\$11,199,500
Total	\$296,436,000

JOBS SUPPORTED BY FAN AND TEAM SPENDING

7,152 jobs were created through Florida Spring Training.

Jobs Supported by Team Spending

Attendee Type	Jobs Supported
All Attendees	6,084
Out of State Attendees <i>Primary trip purpose spring training</i>	3,907
Out of State Attendees <i>Primary trip purpose other</i>	1,099
FL, Non-County Attendees <i>Primary trip purpose spring training</i>	767
FL, Non-County Attendees <i>Primary trip purpose other</i>	311

Jobs Supported by Team Spending Type

Expense Type	Jobs Supported
All Team Spending	1,068
Team Operating Expenses	710
Stadium Operating Expenses	229
Stadium Concessions Expenses	129



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\$687.1 MILLION IN ECONOMIC IMPACT

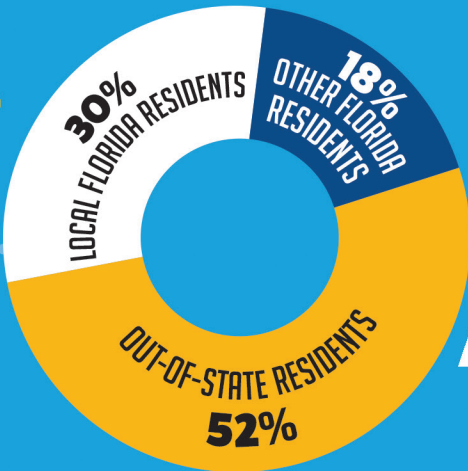
\$584 MILLION IN FAN SPENDING

7,152 JOBS

1,497,306 TOTAL FANS

237 GAMES PLAYED

300,822
OUT OF STATE FANS



6,318
AVERAGE
ATTENDANCE



2018 FLORIDA SPRING TRAINING HIGHLIGHTS

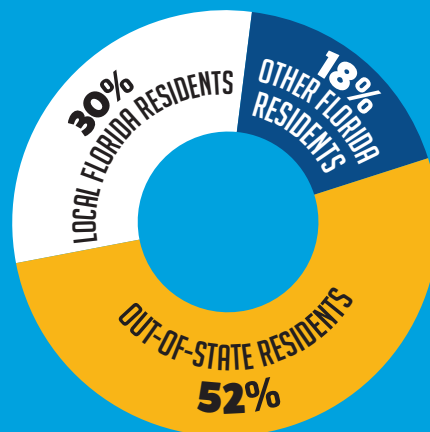
- The New York Yankees had the highest per game average with **9,882 fans attending 16 games** at George M. Steinbrenner Field in Tampa.
- The **most attended day** of the 2018 season was Saturday, March 24, when **64,069 fans attended the eight games** of the day, for an average of **8,009** per game.
- Houston's 2017 World Series Championship resulted in a **21% increase** in attendance for the Astros at FITTEAM Ballpark of the Palm Beaches. **A total of 67,931 fans attended the Astros' Spring Training Games**, up from **55,881 in 2017**.
- **Seven teams**, including the Atlanta Braves, Baltimore Orioles, Boston Red Sox, Detroit Tigers, Minnesota Twins, New York Yankees, and Philadelphia Phillies, **topped the 100,000 total attendance mark**.
- The **Red Sox** had the **top total attendance of the 2018 season**, with **165,688 fans** attending 17 games at Jet Blue Park in Fort Myers.
- The most attended game of the 2017 season was the Atlanta Braves and Philadelphia Phillies, with **10,906 fans** in attendance, at Spectrum Field on St. Patrick's Day, Saturday, March 17.

Since 2000, a total of **29,651,981 fans** have attended Spring Training games in Florida.



ATTENDEE PROFILE FOR FANS

- **Attended an average of 2.9 Florida Spring Training games**
- **25% traveled with children**
- **Main Reason for visiting:**
 - Spring Training (61%)
 - Vacation (18%)
- **Top 2 activities outside Spring Training:**
 - Dining out (60%)
 - Going to the beach (44%)
- **The average age of attendee was 52 years old**
- **Annual household income: \$93,500**
- **Top origin regions**
 - Northeast 30%
 - Florida 28%
 - Midwest 20%
- **Stayed in a hotel (34%)**
- **Traveled with one other person (45%)**
- **Drove to the destination (51%)**
- **86% plan on returning next year**



2018 TEAM-BY-TEAM FLORIDA SPRING TRAINING ATTENDANCE

Atlanta Braves – ESPN Wide World of Sports Complex, Lake Buena Vista

18 Games: 112,981 total attendance; 6,277 average per game

Largest Crowd: 10,330 vs. New York Yankees, March 24

Baltimore Orioles – Ed Smith Stadium, Sarasota

15 Games (1 Rainout): 103,294 total attendance; 6,886 average per game

Largest Crowd: 8,782, vs. New York Yankees, Wednesday, March 14

Boston Red Sox – JetBlue Park, Fort Myers

17 Games: 165,688 total attendance; 9,746 average per game

Largest Crowd: 10,179 vs. Toronto Blue Jays, Thursday, March 15

Detroit Tigers – Publix Field at Joker Marchant Stadium, Lakeland

17 Games: 111,561 total attendance; 6,562 average per game

Largest Crowd: 10,077 vs. New York Yankees, Saturday, March 17

Houston Astros – FITTEAM Ballpark of the Palm Beaches, West Palm Beach

15 Games: 67,931 total attendance; 4,539 average per game

Largest Crowd: 6,663 vs. St. Louis Cardinals, Wednesday, March 14

Miami Marlins – Roger Dean Chevrolet Stadium, Jupiter

15 Games: 56,687 total attendance; 3,779 average per game

Largest Crowd: 7,648 vs. New York Yankees, Sunday, March 11

Minnesota Twins – Hammond Stadium at CENTURYLINK Sports Complex, Fort Myers

15 Games (1 Rainout): 110,770 total attendance; 7,385 average per game

Largest Crowd: 9,284 vs. New York Yankees, Thursday, March 22

New York Mets – First Data Field, Port St. Lucie

17 Games: 93,647 total attendance; 5,509 average per game

Largest Crowd: 7,419 vs. New York Yankees, Wednesday, March 7

New York Yankees – George M. Steinbrenner Field, Tampa

16 Games: 158,104 total attendance; 9,882 average per game

Largest Crowd: 10,330 vs. Tampa Bay Rays, Sunday, March 4

Philadelphia Phillies – Spectrum Field, Clearwater

17 Games: 124,826 total attendance; 7,343 average per game

Largest Crowd: 10,906 vs. Atlanta Braves, Saturday, March 17

Pittsburgh Pirates – LECOM Park, Bradenton

16 Games: 96,363 total attendance; 6,023 average per game

Largest Crowd: 7,814 vs. New York Yankees, Saturday, February 24

St. Louis Cardinals – Roger Dean Chevrolet Stadium, Jupiter

14 Games: 82,791 total attendance; 5,914 average per game

Largest Crowd: 7,339 vs. New York Mets, Saturday, March 24

Tampa Bay Rays – Charlotte Sports Park, Port Charlotte

15 Games: 69,731 total attendance; 4,649 average per game

Largest Crowd: 7,985 vs. New York Yankees, Sunday, March 25

Toronto Blue Jays – Dunedin Stadium, Dunedin

15 Games: 68,929 total attendance; 4,595 average per game

Largest Crowd: 5,514 vs. Boston Red Sox, Monday, March 12

Washington Nationals – FITTEAM Ballpark of the Palm Beaches, West Palm Beach

15 Games: 74,003 total attendance; 4,934 average per game

Largest Crowd: 7,020 vs. St. Louis Cardinals, Sunday, March 25

Florida Spring Training Total Attendance

237 Games (two rained out)

1,497,306 total attendance; 6,318 average per game

Largest Crowd: 10,906, Atlanta Braves vs. Philadelphia Phillies, Spectrum Field, Clearwater, Saturday, March 17



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