

PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS

AGENDA ITEM SUMMARY

Meeting Date:	12/03/2019	<input type="checkbox"/>	Consent	<input checked="" type="checkbox"/>	Regular
		<input type="checkbox"/>	Ordinance	<input type="checkbox"/>	Public Hearing
Department					
Submitted By:	<u>TOURIST DEVELOPMENT COUNCIL</u>				
Submitted For:	<u>TOURIST DEVELOPMENT COUNCIL</u>				

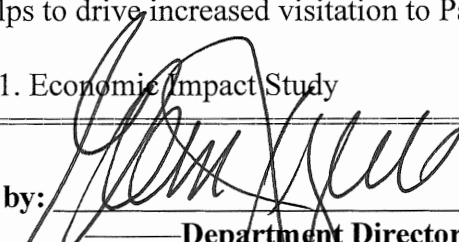
I. EXECUTIVE BRIEF

Motion and Title: Staff recommends motion to receive and file: The research study conducted by Downs & St. Germain commissioned by the Palm Beach County Sports Commission (Sports Commission) to measure the 2019 economic impact that Major League Baseball (MLB) had on Palm Beach County. This study was commissioned and paid for by the Sports Commission with tourist development funds approved in FY2019 annual budget.

Summary: The research group of Downs & St. Germain submitted a report on the economic impact that MLB had on Palm Beach County during the 2019 Spring Training Season. This report found that the four teams (Miami Marlins, St. Louis Cardinals, Washington Nationals, and Houston Astros) combined drew an attendance of 270,857 of which 54% or 146,263 attendees traveled from outside of Palm Beach County, occupying 53,800 hotel room nights. The overall economic impact from the two stadiums was \$70.1 million, with visitation impact of \$51.0 million and \$19.1 million in team spending. FITTEAM Ballpark of the Palm Beaches created \$37,599,300 of economic impact while Roger Dean Stadium generated \$32,546,200 of economic impact. Palm Beach County is the only County to accommodate four (4) MLB teams, two (2) of which competed against each other in the 2019 World Series. This World Series performance is expected to drive a higher number of visitors to our ballparks in 2020 as the FITTEAM Ballpark of the Palm Beaches is host to both the Houston Astros and the Washington Nationals. In addition to MLB some of the largest amateur baseball tournaments are taking place at FITTEAM Ballpark of the Palm Beaches and Roger Dean Chevrolet Stadium creating year-round activity. (DC)(Countywide)

Background and Policy Issues: On September 26, 2019, the Board approved a second Amendment to the Agreement (R-2017-1634) with Palm Beach County Sports Commission, Inc. for the provision of services under the County's Tourist Development Plan to promote sports related tourism to Palm Beach County. The Sports Commission procures an annual study on the economic impact of MLB in Palm Beach County. This study helps to drive decisions regarding FITTEAM Ballpark of the Palm Beaches and Roger Dean Chevrolet Stadium. The success of these venues helps to drive increased visitation to Palm Beach County.

Attachments: 1. Economic Impact Study

Recommended by:  Department Director

Date 11/12/19

Approved By:  County Administrator

Date 11/18/19

II. FISCAL IMPACT ANALYSIS

A. Five Year Summary of Fiscal Impact:

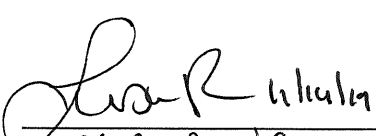
Fiscal Years	2019	2020	2021	2022	2023
Capital Expenditures	_____	_____	_____	_____	_____
Operating Costs	_____	_____	_____	_____	_____
External Revenues	_____	_____	_____	_____	_____
Program Income (County)	-----	-----	-----	-----	-----
In-Kind Match (County)	-----	-----	-----	-----	-----
NET FISCAL IMPACT	=====	=====	=====	=====	=====
# ADDITIONAL FTE POSITIONS (Cumulative)	- 0-	0----	0----	0----	0-----
Is Item Included In Proposed Budget?	Yes _____		No.		
Budget Account No.: Fund _____ Reporting Category _____	Dept _____	Unit _____	Object _____		

B. Recommended Sources of Funds/Summary of Fiscal Impact:

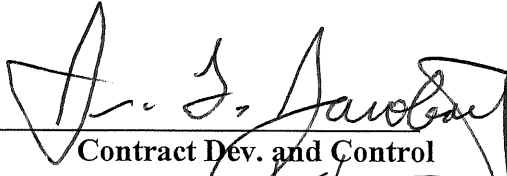
C. Department Fiscal Review: _____

III. REVIEW COMMENTS

A. OFMB Fiscal and/or Contract Administration Comments:




11/13 & 11/13 OFMB



Contract Dev. and Control
11/15/19

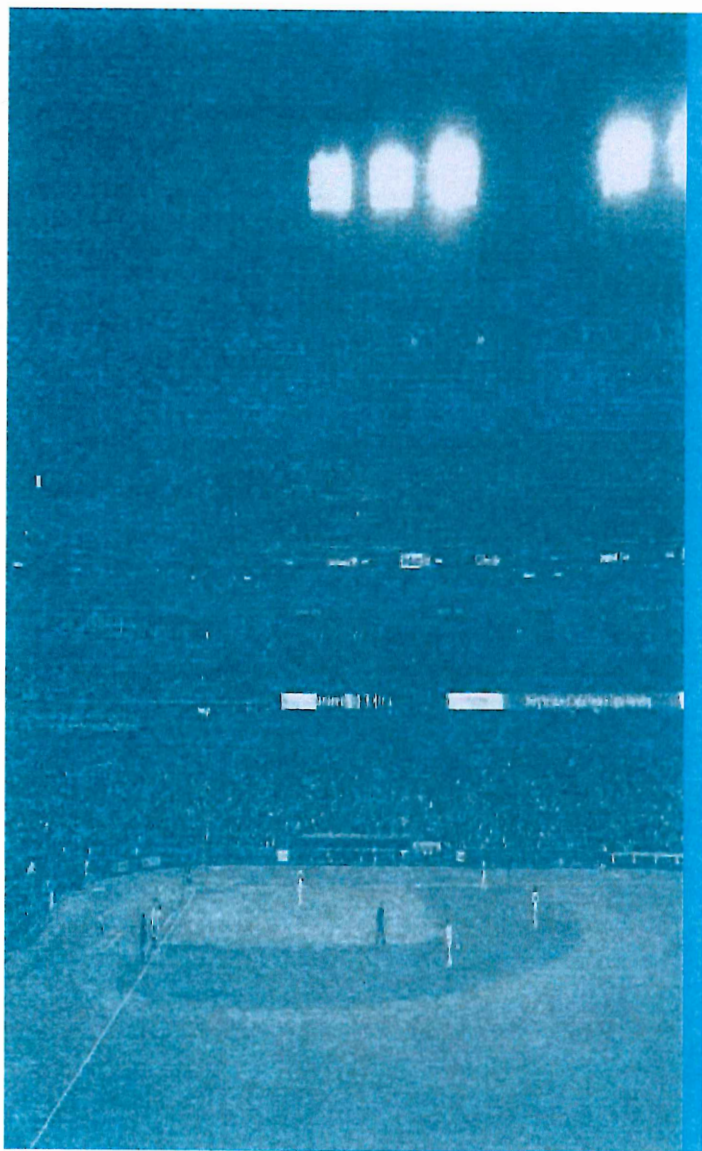
B. Approved as to form and Legal Sufficiency:



Assistant County Attorney
4/15/19

C. Approved as to Terms and Conditions:

Department Director

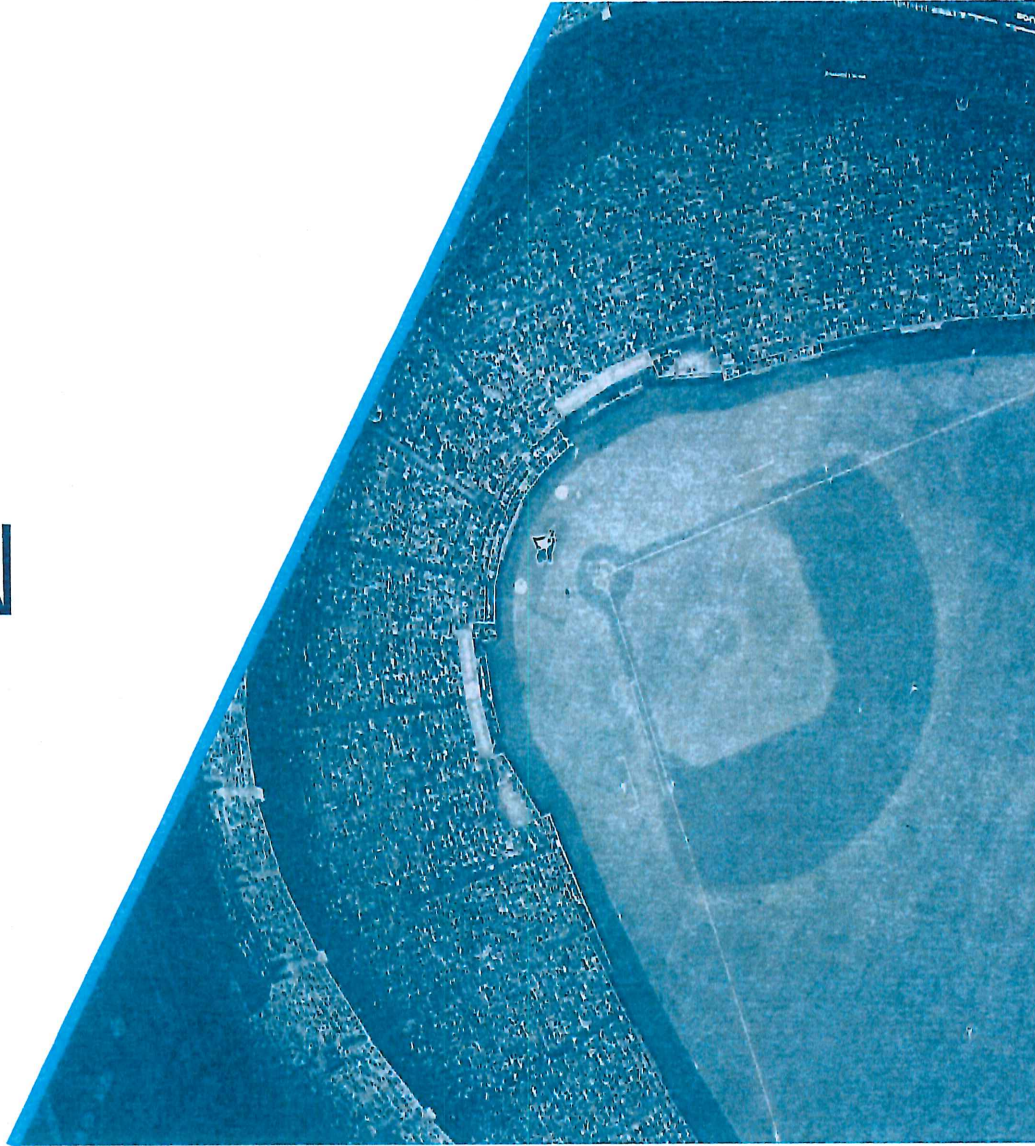


2019 Major League Baseball Palm Beach County Spring Training Economic Impact Study

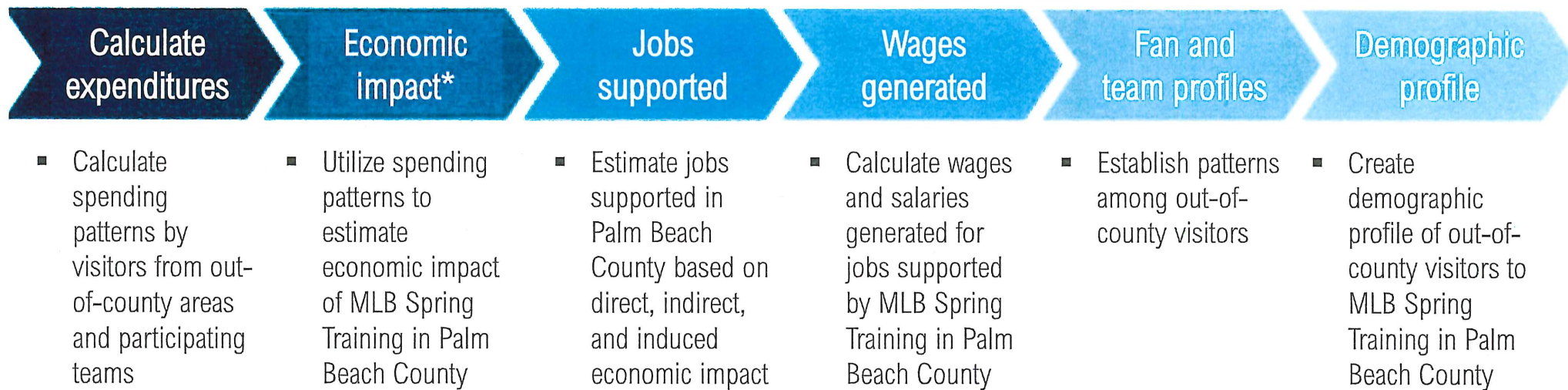
Joseph St. Germain, Ph.D
Phillip Downs, Ph.D
Rachael Anglin
Isiah Lewis
Glencora Haskins

DS downs & st. germain
RESEARCH

INTRODUCTION



STUDY GOALS



*For additional information on economic impact, see the Methodology slide at the end of this report.

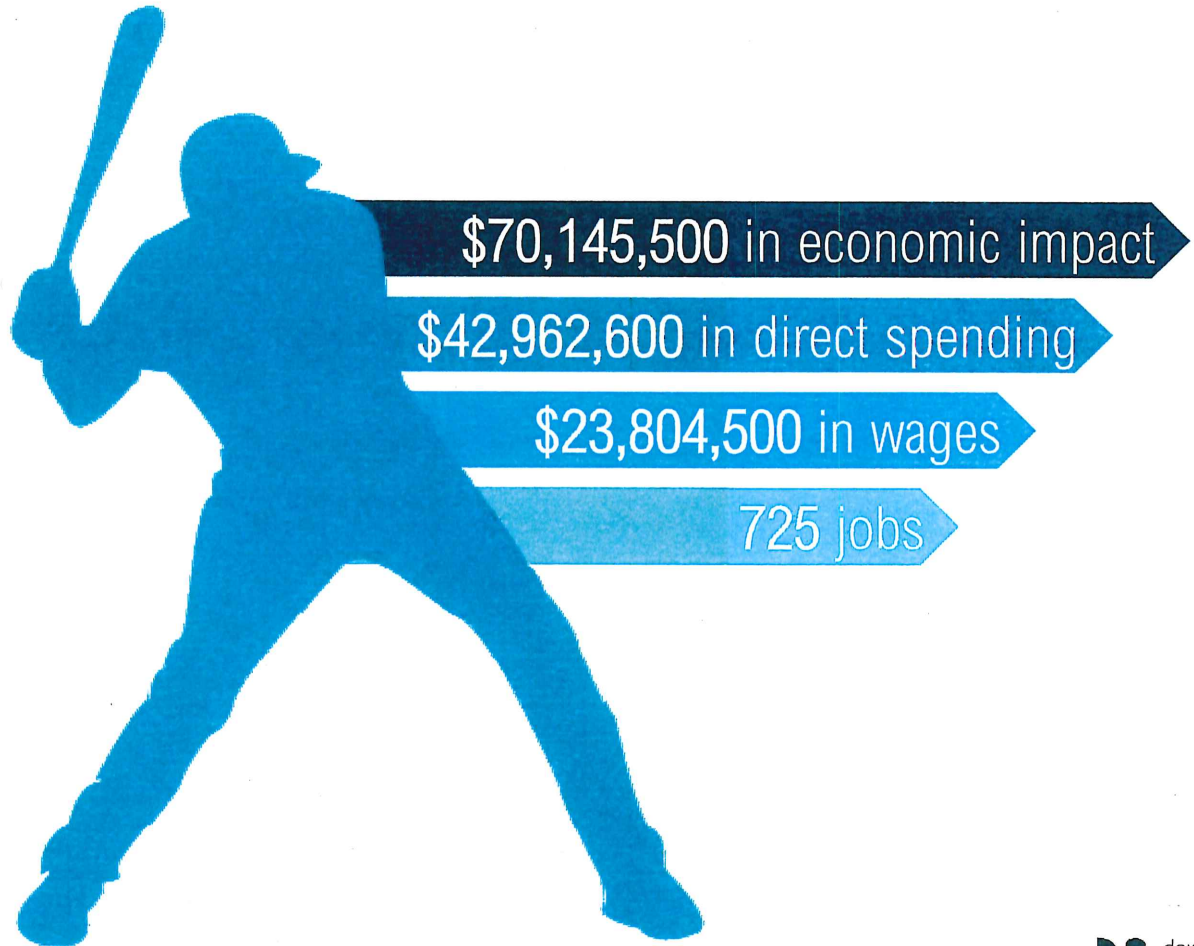
EXECUTIVE SUMMARY



OVERALL ECONOMIC IMPACT

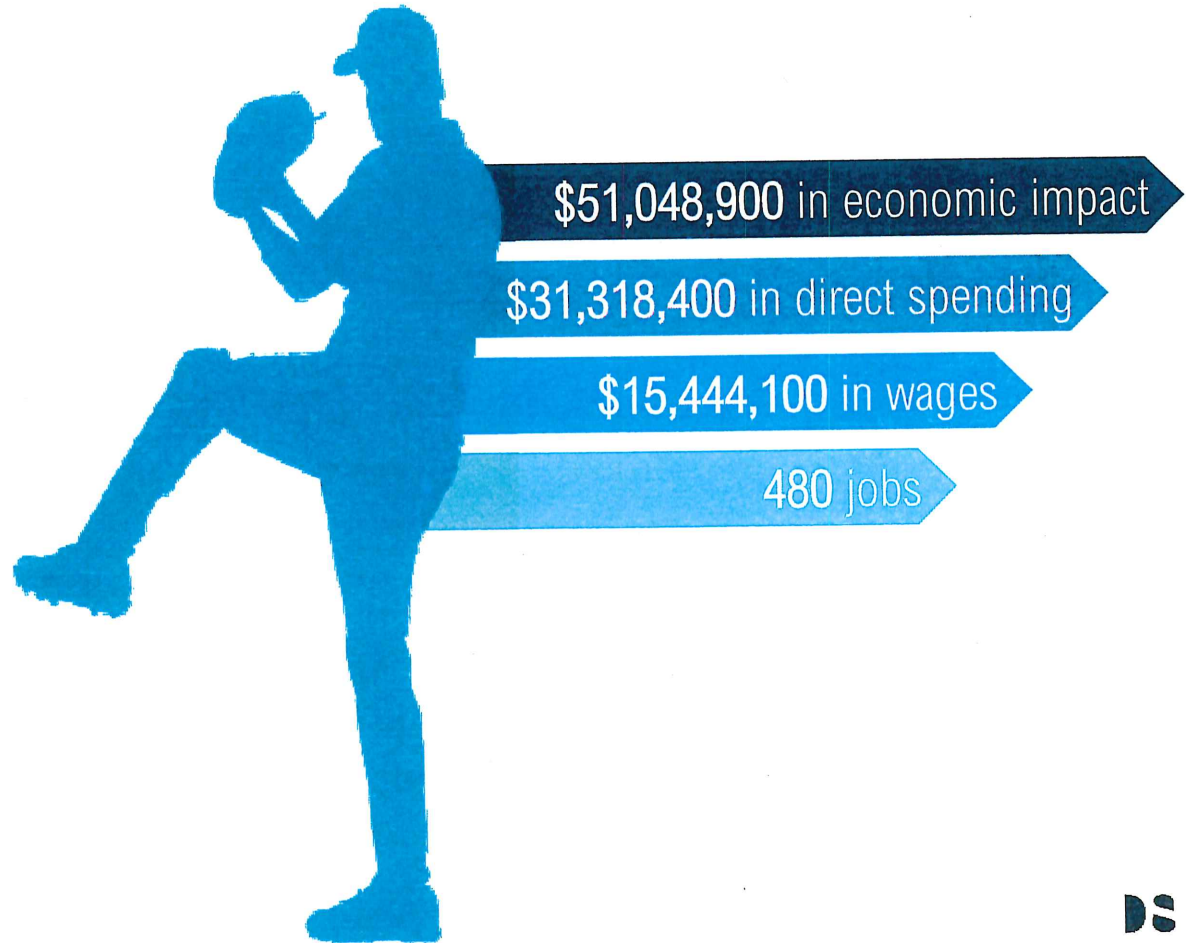


MLB Spring Training
2019 generated an
economic impact of
\$70,145,500
in Palm Beach County.



ECONOMIC IMPACT OF VISITORS

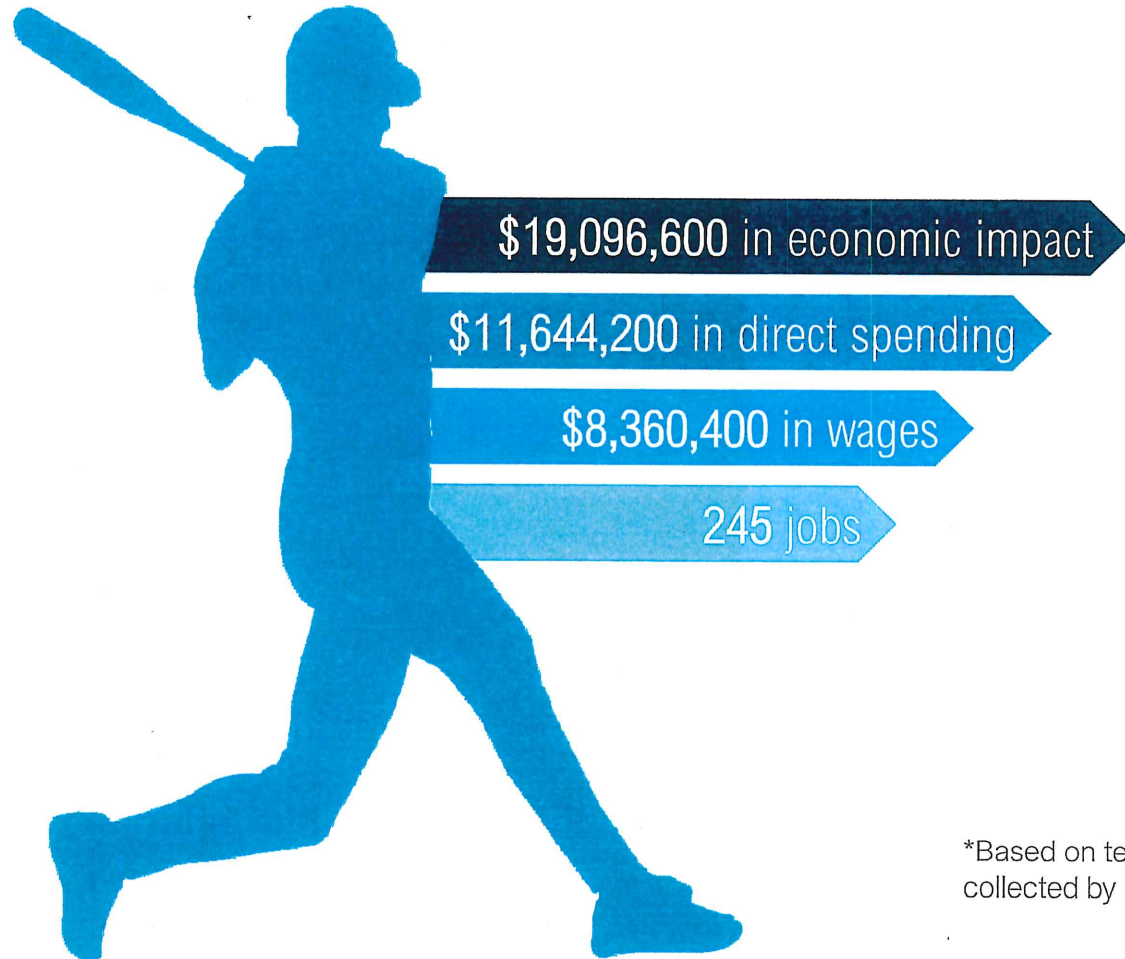
Out-of-county visitors to
2019 MLB Spring
Training generated an
economic impact of
\$51,048,900
in Palm Beach County.



ECONOMIC IMPACT OF TEAM SPENDING



Team spending during
2019 MLB Spring
Training generated an
economic impact of
\$19,096,600
in Palm Beach County*.



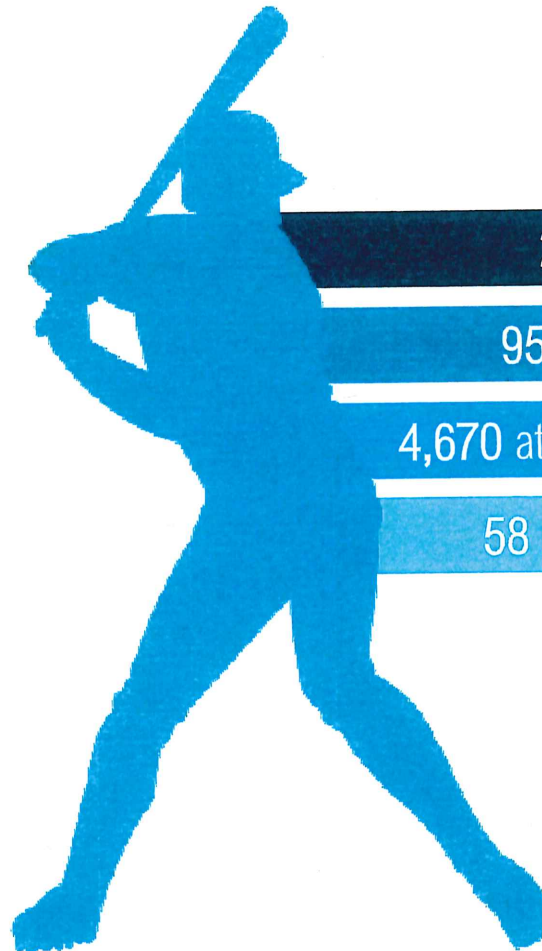
*Based on team spending data
collected by MLB in 2018.

ATTENDEES & GAMES

2019 MLB Spring Training in
Palm Beach County attracted

270,857

local and out-of-county fans to
attend MLB Spring Training*.



270,857 fans in attendance

95,411 unique attendees

4,670 attendees per game

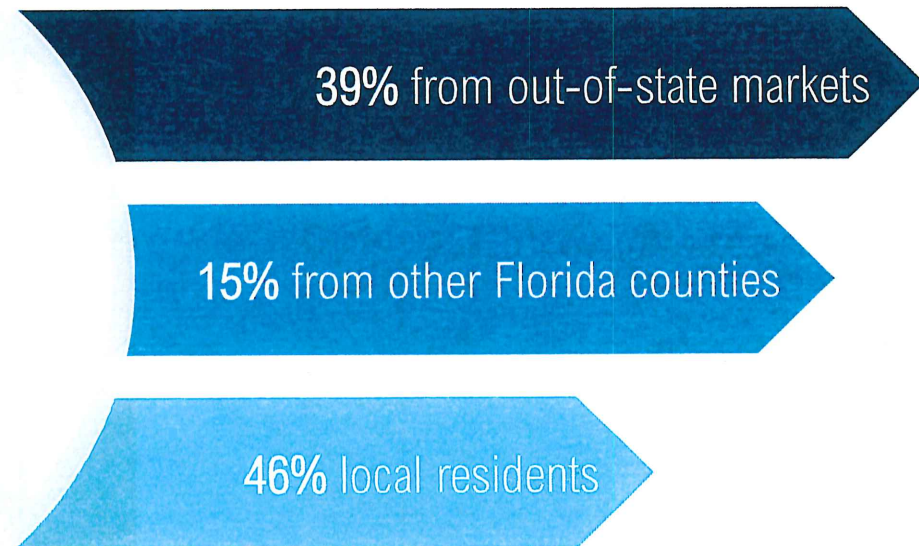
58 games played

*Source: FITTEAM Ballpark
the Palm Beaches and Roger
Dean Chevrolet Stadium

ATTENDEE ORIGINS



4,670
attendees per game



TYPICAL OUT-OF-COUNTY ATTENDEES

- Attended **2.5** Spring Training games
- **22%** traveled with children
- **75%** visited for Spring Training
- Top activities outside Spring Training were:
 - Visiting the beach (**41%**)
 - Dining out (**36%**)
- Were **54** years old
- Earned **\$107,100** per year in household income
- Came from the Northeast (**28%**) and other Florida counties (**28%**)
- **59%** stayed in a hotel
- Gave 2019 MLB Spring Training in Palm Beach County a **9.2** rating*
- **98%** plan on returning next year



*On a 10-point scale where 10 means "excellent," and 1 means "poor".

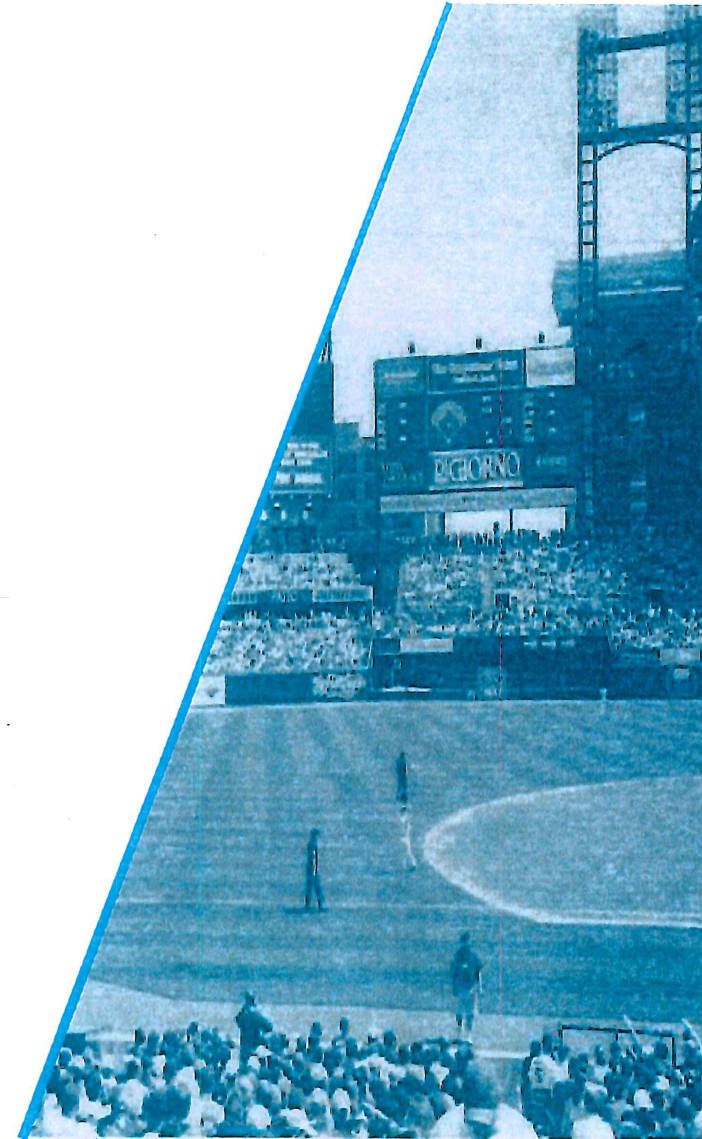
ROOM NIGHTS

Out-of-county visitors and participating
teams stayed

53,800

room nights in paid accommodations
throughout Palm Beach County during
2019 MLB Spring Training*.

*Team room nights based on team
spending data collected by MLB in 2018.



ECONOMIC IMPACT BY TEAM



ST. LOUIS CARDINALS

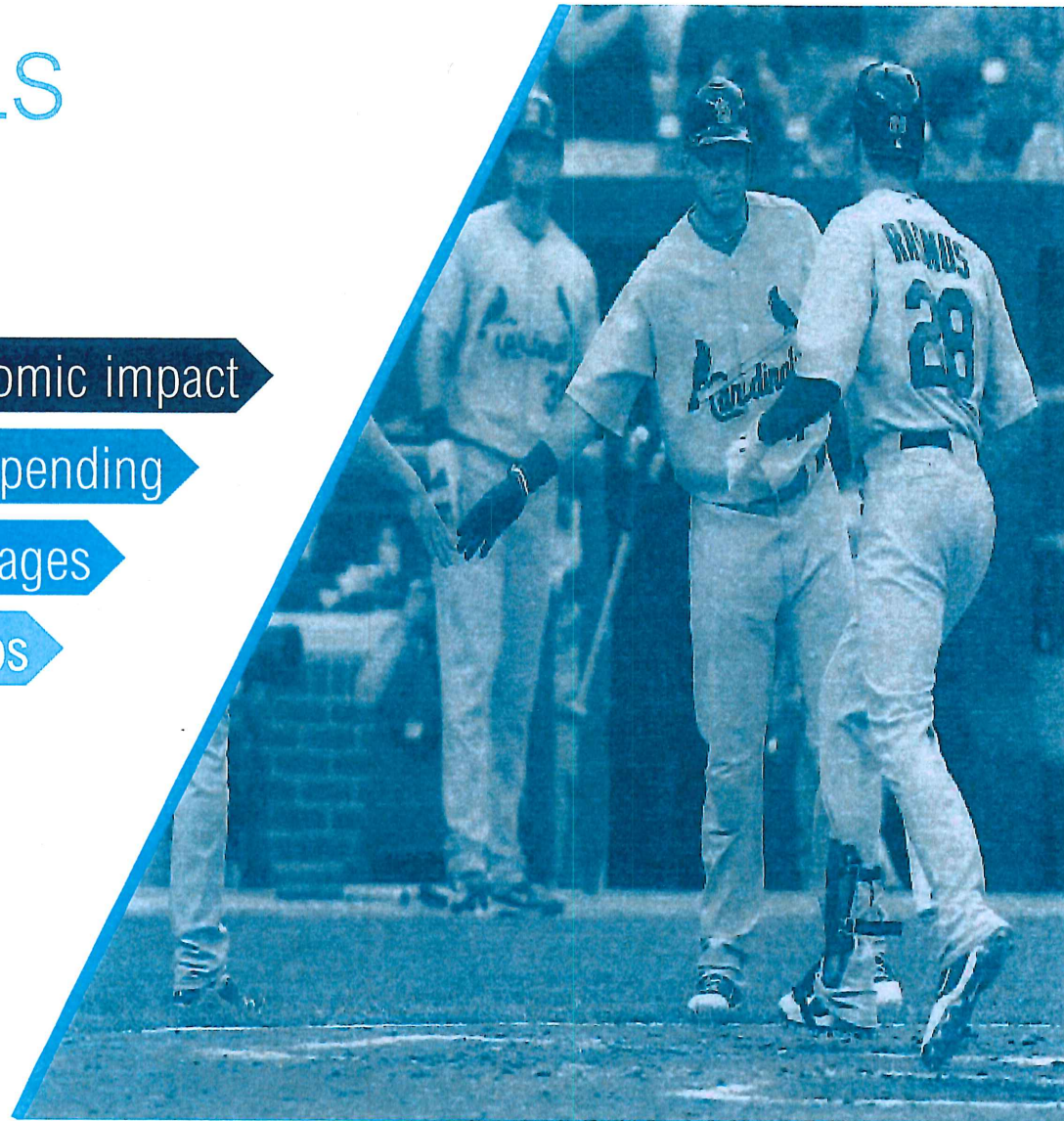


\$23,421,400 in economic impact

\$14,345,100 in direct spending

\$7,827,500 in wages

235 jobs



MIAMI MARLINS

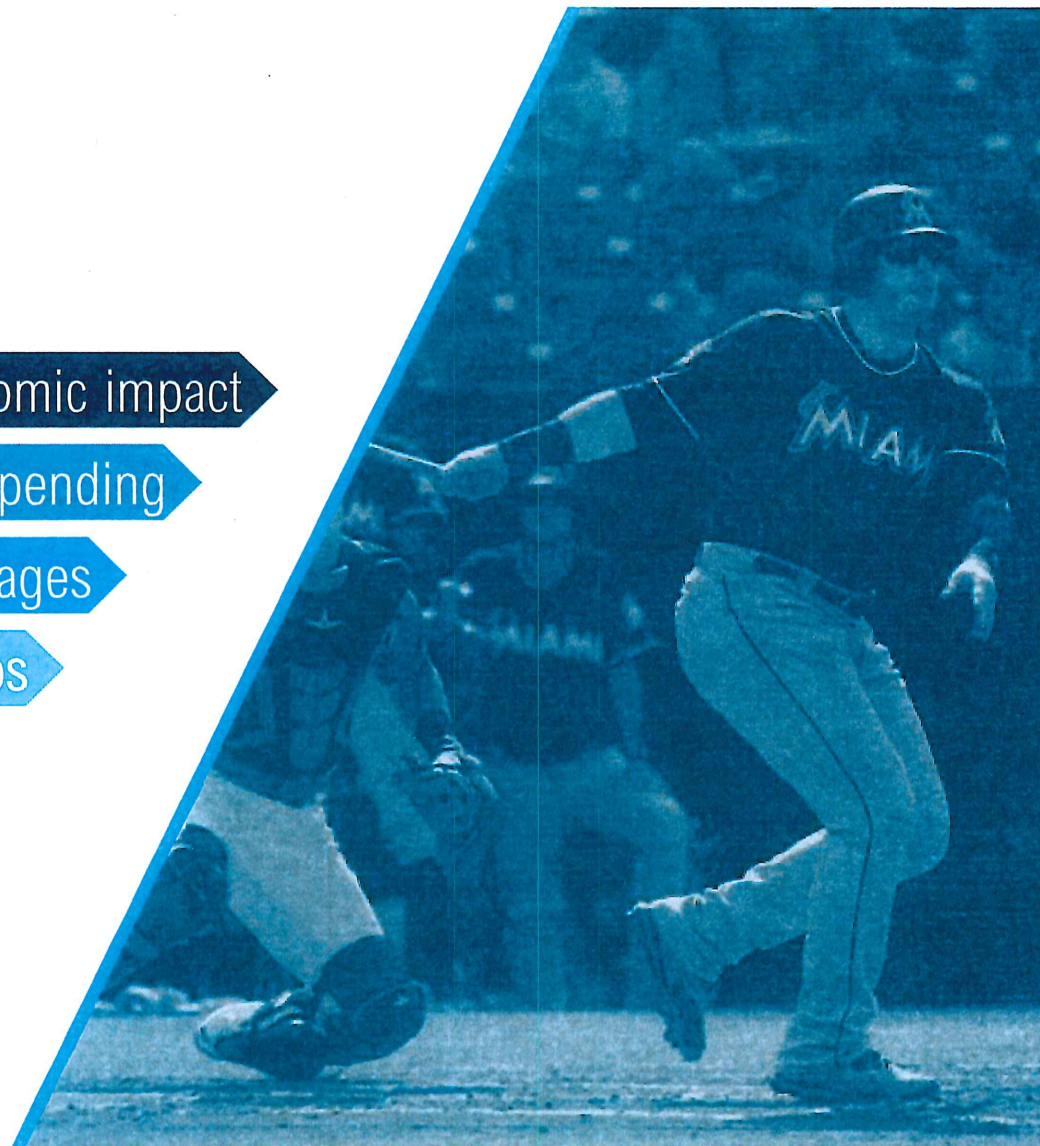


\$9,124,800 in economic impact

\$5,588,800 in direct spending

\$3,405,000 in wages

113 jobs



HOUSTON ASTROS

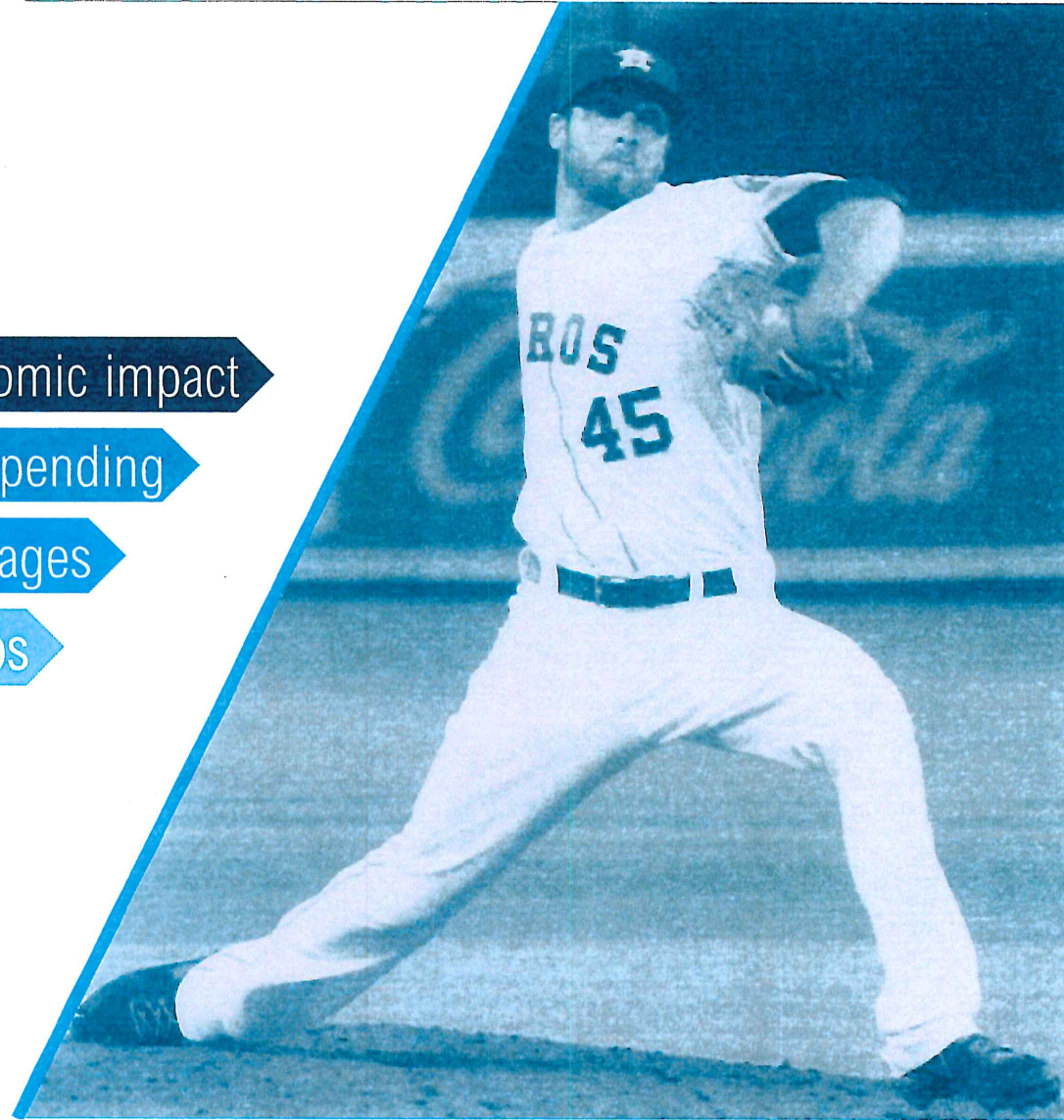


\$19,392,700 in economic impact

\$11,877,600 direct spending

\$6,188,000 in wages

176 jobs



WASHINGTON NATIONALS

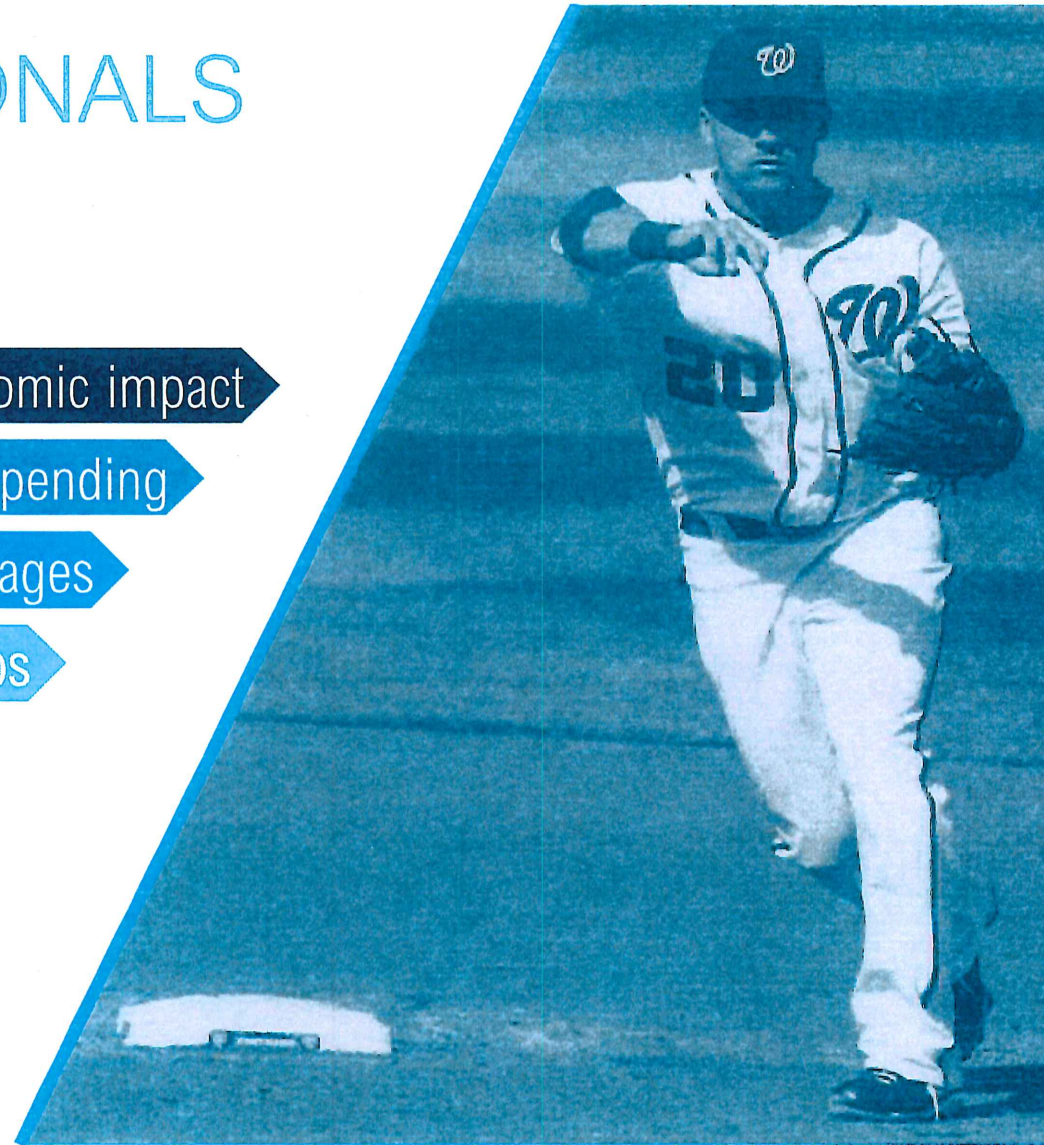


\$18,206,600 in economic impact

\$11,151,100 in direct spending

\$6,384,000 in wages

201 jobs



OUT-OF-COUNTY ATTENDEE SPENDING BY CATEGORY

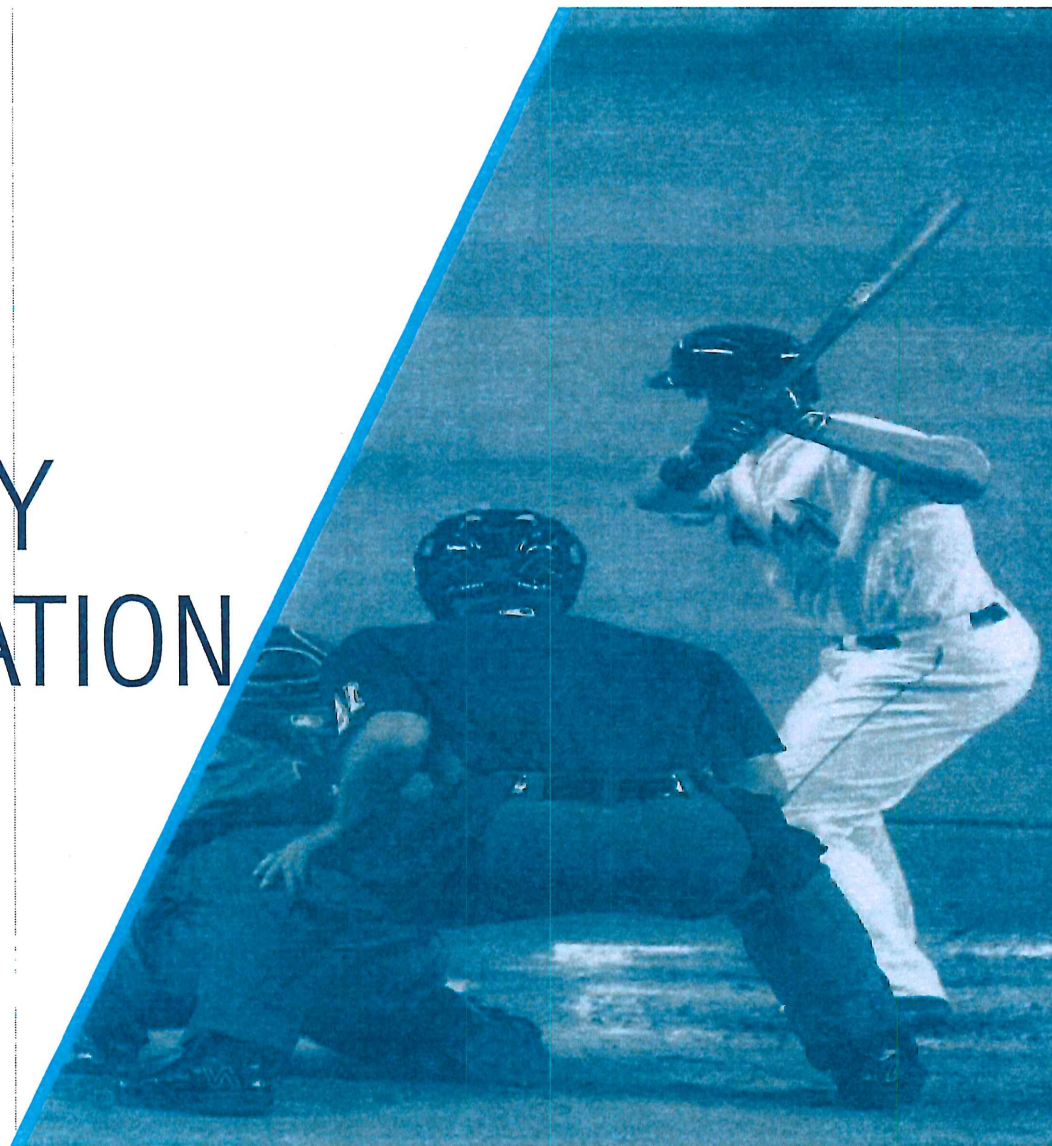


OUT-OF-COUNTY ATTENDEE SPENDING

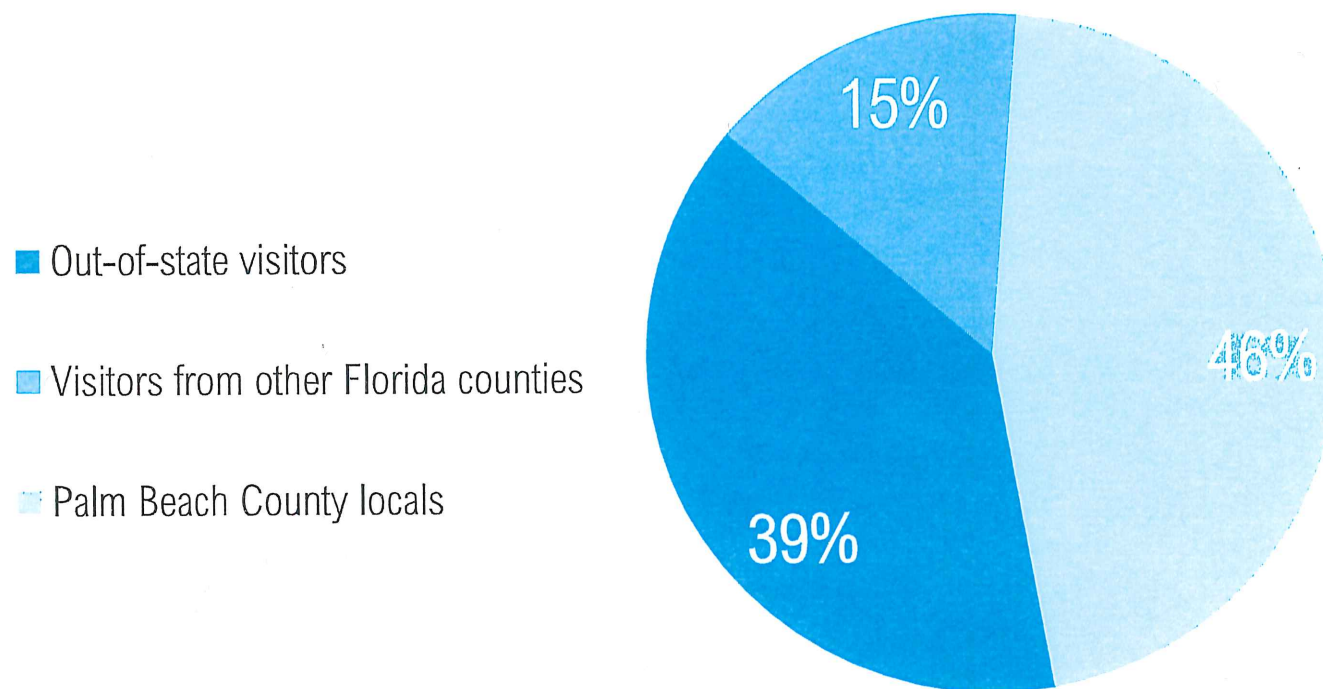


EXPENDITURE	TOTAL
Accommodations	\$8,507,200
Restaurants	\$8,277,800
Groceries	\$1,347,100
Shopping	\$4,956,700
Entertainment	\$5,292,600
Transportation	\$2,101,500
Other	\$835,500
TOTAL	\$31,318,400

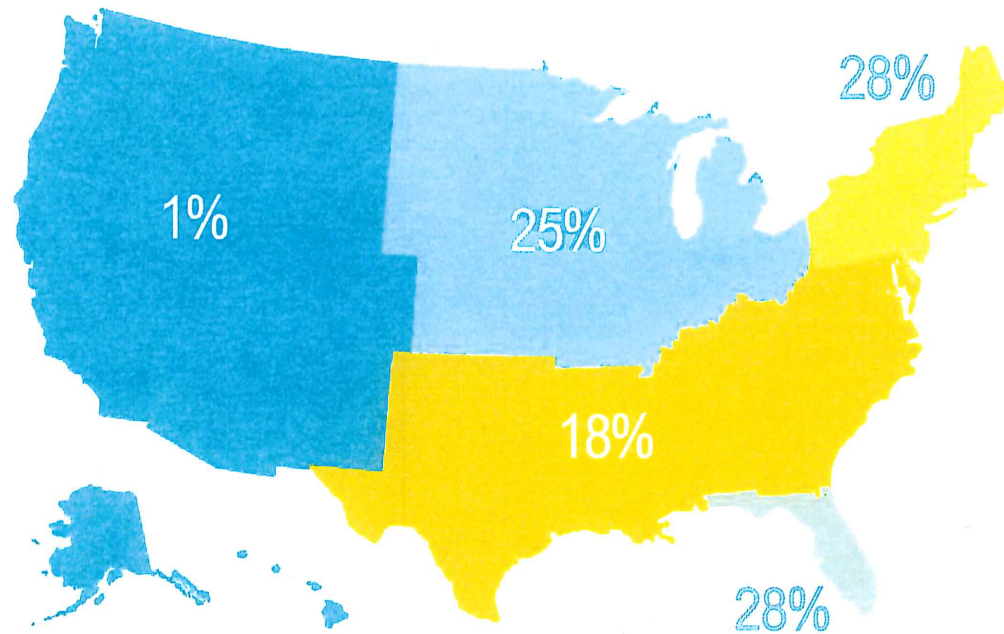
OUT-OF-COUNTY ATTENDEE INFORMATION








ATTENDEE BREAKDOWN



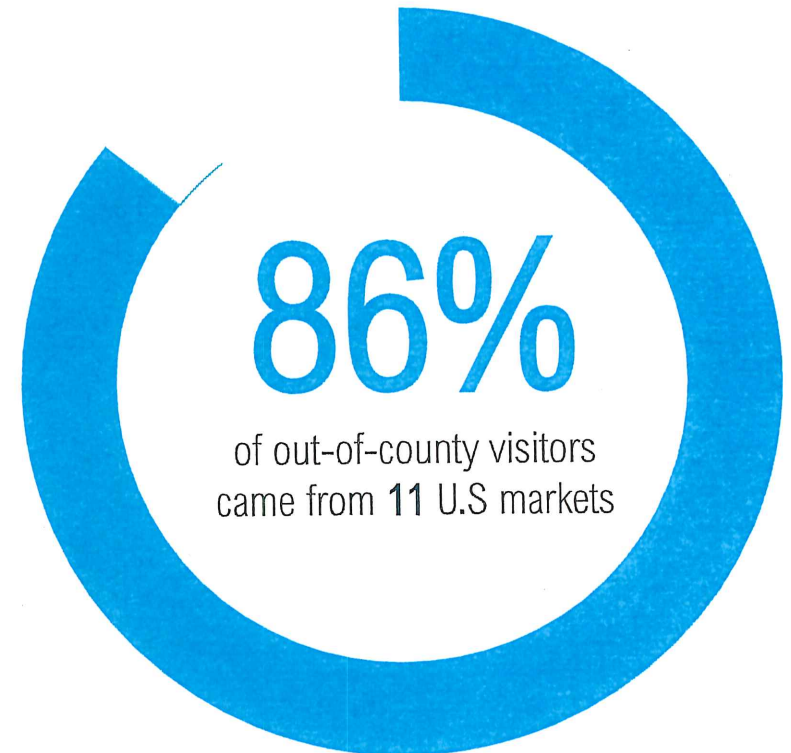
REGION OF ORIGIN



-  West
-  Midwest
-  Northeast
-  Southeast
-  Florida

MARKET OF ORIGIN

Origin Market	Percentage of Visitors
Miami-Ft. Lauderdale	22%
St. Louis	20%
Houston	11%
New York City	9%
Washington DC-Baltimore	9%
Atlanta	4%
Orlando	3%
Boston	2%
Richmond	2%
Melbourne-Vero Beach	2%
Buffalo-Rochester	2%

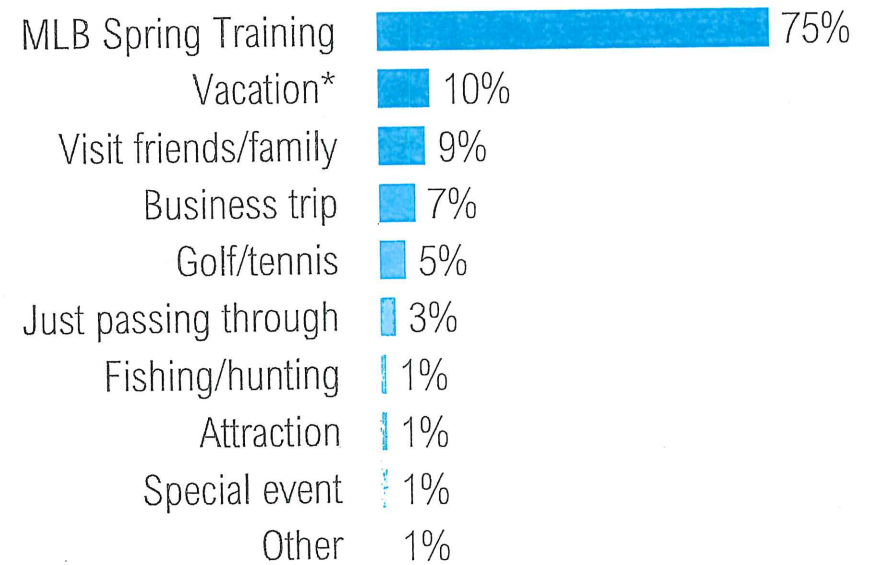


REASONS FOR VISITING



MLB Visitors

3 in 4 visiting attendees traveled to Palm Beach County to attend Spring Training.



*Multiple responses permitted.

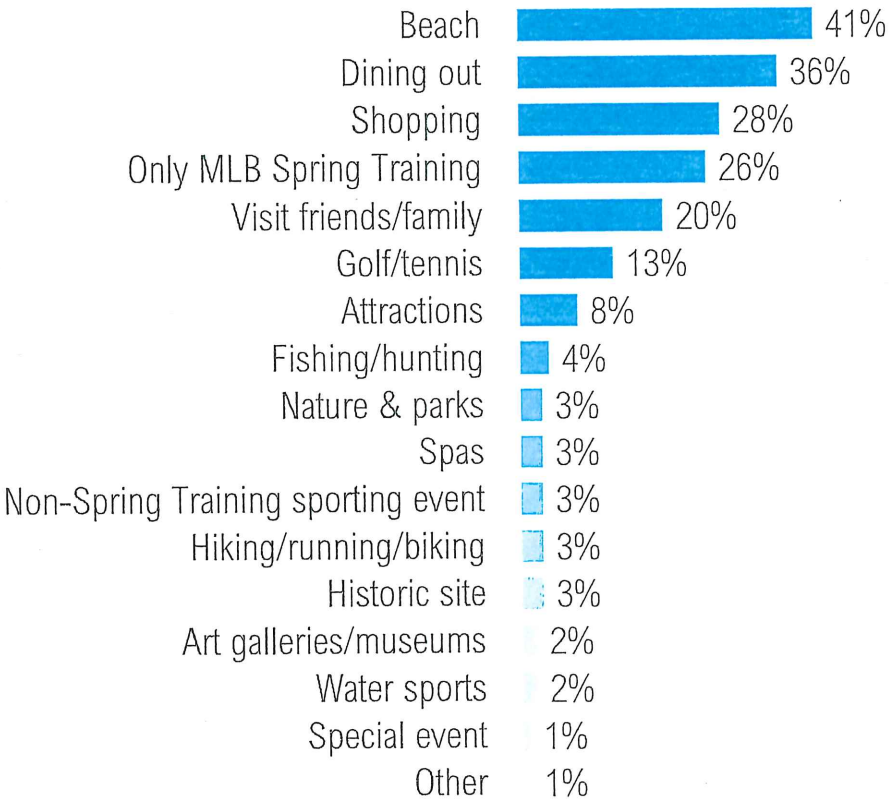
OTHER VISITOR ACTIVITIES*



Beach
41% of visiting attendees went to the beach during their trip.



MLB-Exclusive Visitors
26% of visiting attendees did not engage in any other activities.



*Multiple responses permitted.

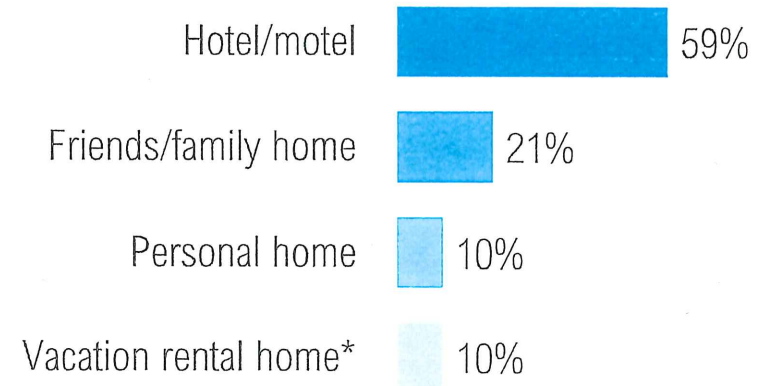
OVERNIGHT VISITORS



Nights Stayed

Typical visiting attendees spent **2.9** nights in Palm Beach County related to Spring Training.

ACCOMMODATIONS



*Includes Airbnb, VRBO, and HomeAway vacation rentals.

TRAVEL PARTIES



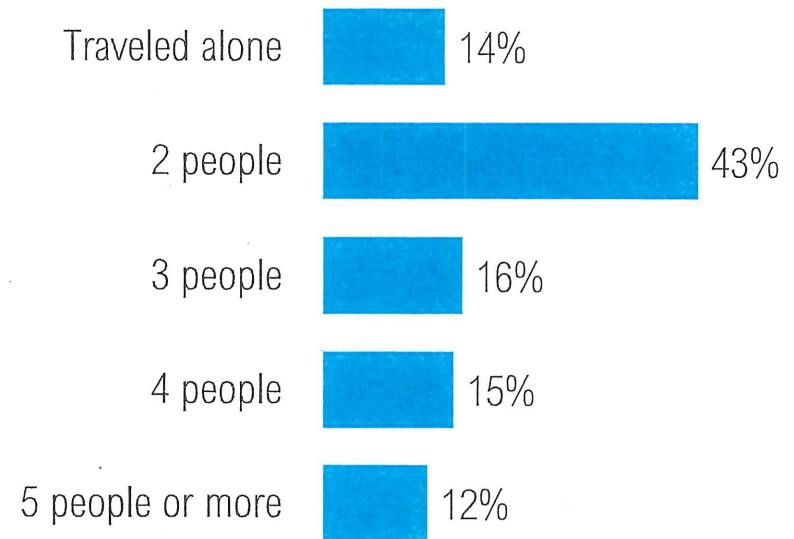
Travel Parties

Typical visitors traveled to Palm Beach County in a party of **2.9** people.

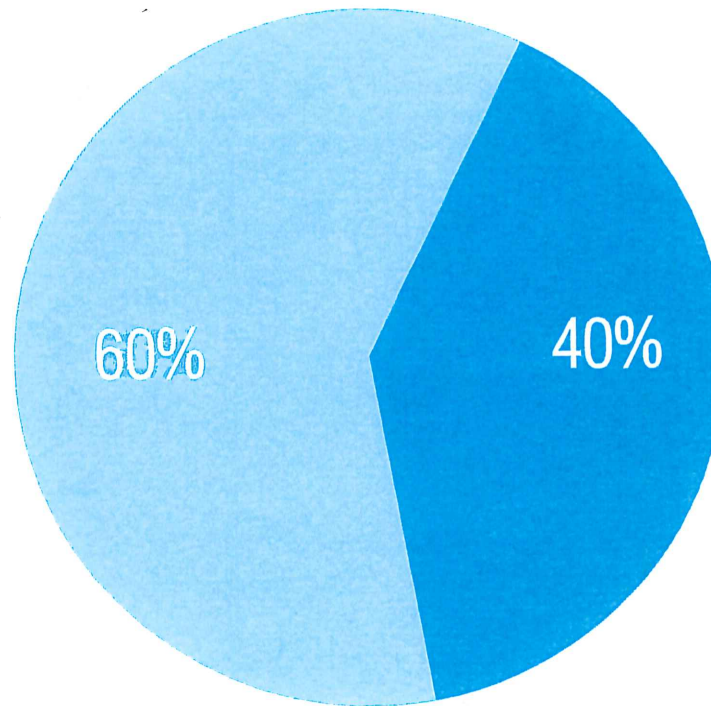


Children

22% of visiting attendees traveled with at least one person under 18 years old.



TRANSPORTATION



■ Visitors who drove ■ Visitors who flew

VISITOR SATISFACTION



Rating

Visiting attendees gave Palm Beach County a rating of **9.2** as a place to visit.*

Returning Visitors

98% of visiting attendees will return next year for MLB Spring Training.

Definitely will return 75%

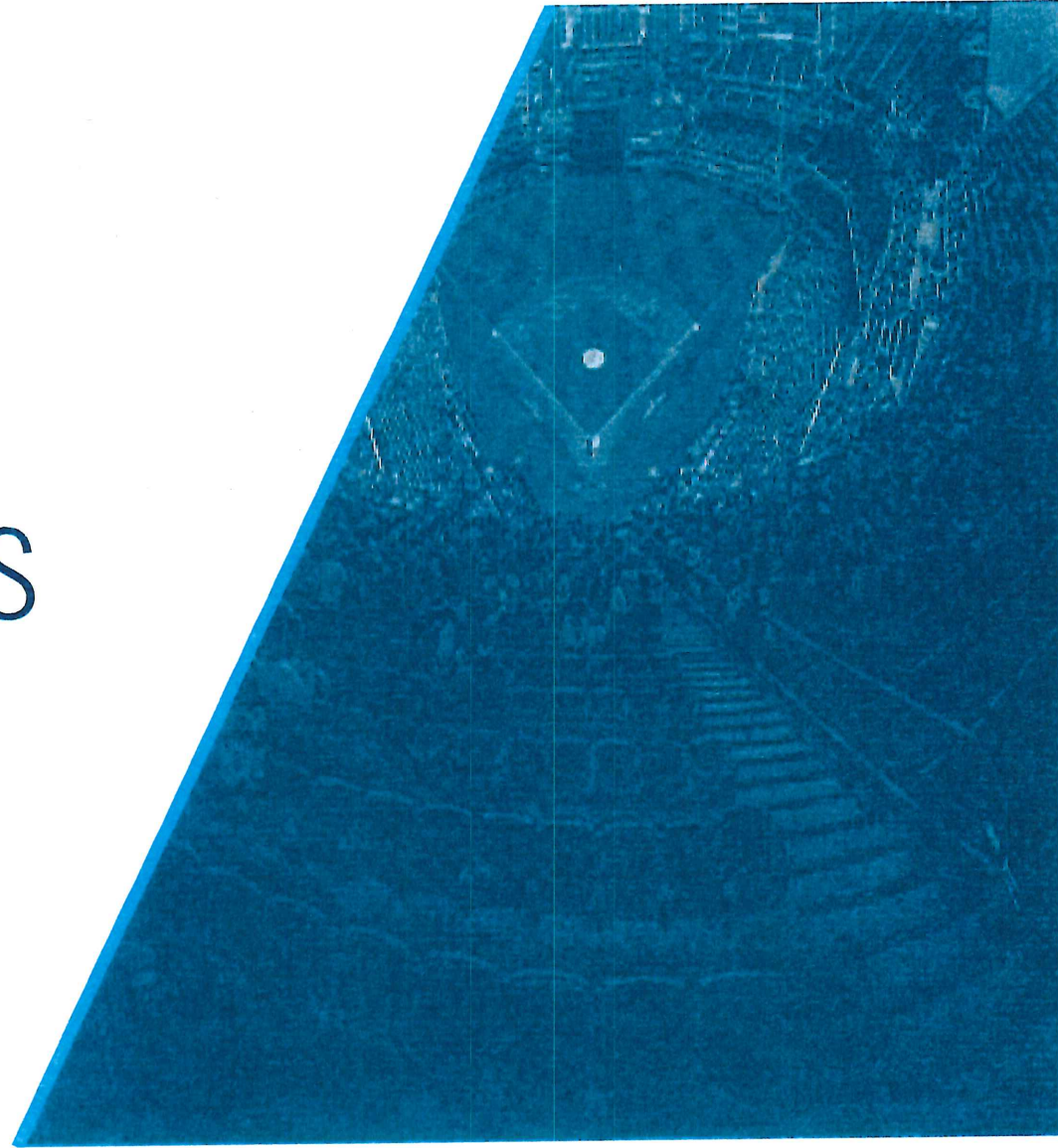
Probably will return 23%

Probably will not return 1%

Definitely will not return 1%

*On a 10-point scale where 10 means "excellent" and 1 means "poor".

DEMOGRAPHICS

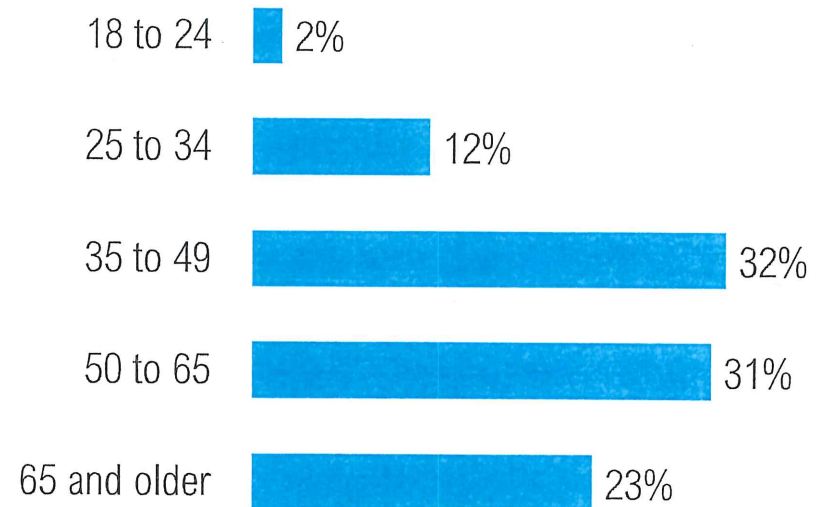


AGE



Median Age

The typical attendee was 54 years old.

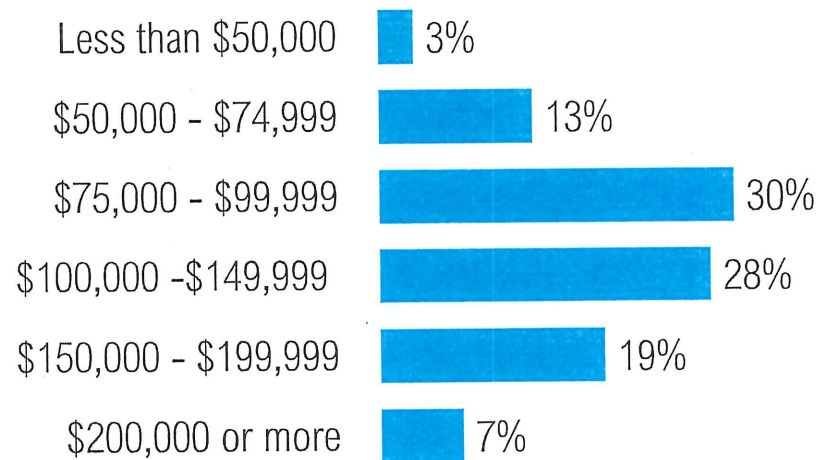


AGE

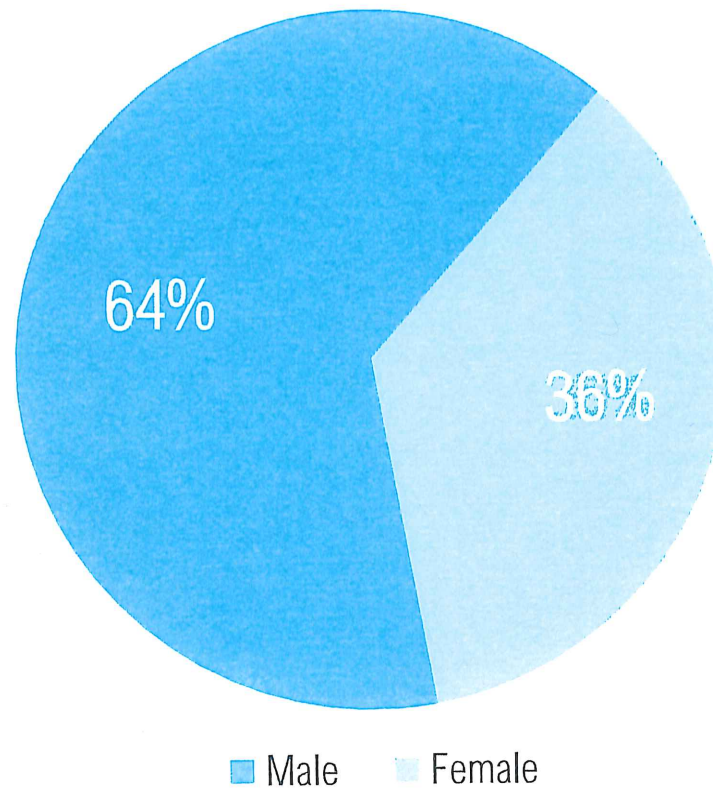


Median Income

The typical attendee earned **\$107,100** per year in household income.



GENDER



METHODOLOGY

Economic Impact

Total economic impact of 2019 MLB Spring Training on Palm Beach County is a function of direct spending by visitors and teams in the county and induced and indirect effects of this spending.

- ☐ Indirect effects are increased business spending from Spring Training dollars.
- ☐ Induced effects are increased household spending resulting from Spring Training dollars.
- ☐ Economic impact is largely affected by percentage of local attendees, purpose of visit, length of stay, study parameters (statewide vs. countywide), games attended, travel party size, and spending behavior.

Multiplier

Downs & St. Germain Research uses IMPLAN economic modeling to calculate the economic multiplier based on direct expenditure data collected from MLB Spring Training teams and fans.

- ☐ IMPLAN models how dollars are spent and re-spent in other sectors of the economy, generating economic activity.
- ☐ Over 1,500 organizations use IMPLAN, which has been used to model the economic impact of tourism since 1992.
- ☐ Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling.





2019 Major League Baseball Palm Beach County Spring Training Economic Impact Study

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Downs & St. Germain Research

850-906-3111: www.dsg-research.com

Amateur Baseball Events in Palm Beach County

July 1, 2018 - June 30, 2019

Event	Facility	Date	# of Teams	Athletes	Spectators	Room Nights	Estimated Visitor Spending
Under Armour Firecracker Classic	Roger Dean Chevrolet Stadium	July 6-10, 2018	42	630	945	209	\$146,300
Perfect Game Florida Tucci Lumber Endless Summer Classic	FITTEAM Ballpark of the Palm Beaches	July 12-16, 2018	50	750	1,125	549	\$384,300
The Wave Invitational	FITTEAM Ballpark of the Palm Beaches	July 20-24, 2018	65	975	1,462	806	\$564,200
Wilson Premier Classic	FITTEAM Ballpark of the Palm Beaches	September 14-17, 2018	62	1,116	1,674	839	\$587,300
Under Armour Fall Classic	Roger Dean Chevrolet Stadium	September 21-23, 2018	20	300	450	80	\$56,000
Prospect Select Baseball - September Classic	FITTEAM Ballpark of the Palm Beaches	September 22-24, 2018	40	600	900	423	\$296,100
Hardball 360 Fall Classic	FITTEAM Ballpark of the Palm Beaches	October 3-7, 2018	6	80	N/A	259	\$181,300
Perfect Game World Wood Bat Association (WWBA) World Championship	Roger Dean Chevrolet Stadium & FITTEAM Ballpark of the Palm Beaches	October 18-22, 2018	88	1,584	2,376	3,360	\$2,352,000
Perfect Game Freshman World Series	Roger Dean Chevrolet Stadium & FITTEAM Ballpark of the Palm Beaches	October 19-22, 2018	72	1,296	1,944	2,653	\$1,857,100
Dominican Republic Showcase	Roger Dean Chevrolet Stadium	October 23-27, 2018	N/A	65	N/A	136	\$95,200
World Comes to the Palm Beaches	FITTEAM Ballpark of the Palm Beaches	October 31 - November 4, 2018	36	540	810	1,123	\$786,100
Men's Senior Baseball League (MSBL) Fall Classic	Roger Dean Chevrolet Stadium & FITTEAM Ballpark of the Palm Beaches	November 4-17, 2018	96	1,278	2,592	3,972	\$2,780,400
Baseball Canada Junior National Team Pan Am Championships Final Camp	FITTEAM Ballpark of the Palm Beaches	November 13-21, 2018	N/A	60	N/A	190	\$133,000
Perfect Game Youth Florida South Florida Fall Invitational	FITTEAM Ballpark of the Palm Beaches	November 17-18, 2018	20	300	450	120	\$84,000
Perfect Game Youth Florida South Florida Challenge	FITTEAM Ballpark of the Palm Beaches	December 2-3, 2018	16	240	360	91	\$63,700

Amateur Baseball Events in Palm Beach County

July 1, 2018 - June 30, 2019

Event	Facility	Date	# of Teams	Athletes	Spectators	Room Nights	Estimated Visitor Spending
Coast to Coast Winter Showcase	Roger Dean Chevrolet Stadium	December 27-31, 2018	N/A	200	N/A	112	\$78,400
Game Day USA Junior American Games	FITTEAM Ballpark of the Palm Beaches & Jupiter Community Park	January 18-20, 2019	30	400	600	754	\$527,800
St. Louis Cardinals Fantasy Camp	Roger Dean Chevrolet Stadium	January 24-29, 2019	N/A	315	N/A	988	\$691,600
Hardball 360 Spring Training	FITTEAM Ballpark of the Palm Beaches	April 3-7, 2019	4	42	N/A	109	\$76,300
Play at the Plate	Roger Dean Chevrolet Stadium	April 4-7, 2019	N/A	300	N/A	155	\$108,500
Perfect Game Youth Florida Spring Classic	FITTEAM Ballpark of the Palm Beaches	April 12-14, 2019	16	240	360	81	\$56,700
Baseball Canada Junior National Team Spring Training	FITTEAM Ballpark of the Palm Beaches	April 17-28, 2019	N/A	120	N/A	305	\$213,500
Perfect Game 14U Florida Showcase	FITTEAM Ballpark of the Palm Beaches	April 27-28, 2019	N/A	60	N/A	70	\$49,000
The Sun Conference Baseball Championship	FITTEAM Ballpark of the Palm Beaches	May 4-7, 2019	6	150	600	326	\$228,200
Academy World Series/Junior Future Series Summer Kickoff	FITTEAM Ballpark of the Palm Beaches	May 10-12, 2019	24	500	N/A	156	\$109,200
Under Armour Memorial Day Classic	Under Armour Memorial Day Classic	May 24-27, 2019	36	540	810	99	\$69,300
South Florida Collegiate Baseball League	Various baseball facilities throughout Palm Beach County	June 1 - July 24, 2019	10	250	250	2,690	\$1,883,000
Prospect Select Baseball National Showcase - Palm Beach Classic	FITTEAM Ballpark of the Palm Beaches, Roger Dean Chevrolet Stadium, & Santaluces Athletic Complex	June 7-12, 2019	220	3,960	5,940	4,066	\$2,846,200
Florida State League All Star Game	Roger Dean Chevrolet Stadium	June 14-15, 2019	2	150	N/A	462	\$323,400
USA Baseball National Team Championships	Roger Dean Chevrolet Stadium & FITTEAM Ballpark of the Palm Beaches	June 14-30, 2019	68	1,224	1,836	4,365	\$3,055,500

Amateur Baseball Events in Palm Beach County **July 1, 2018 - June 30, 2019**

Event	Facility	Date	# of Teams	Athletes	Spectators	Room Nights	Estimated Visitor Spending
TOTALS			1,029	18,265	25,484	29,548	\$20,683,600