

The Florida Sports Economy

Economic Impacts

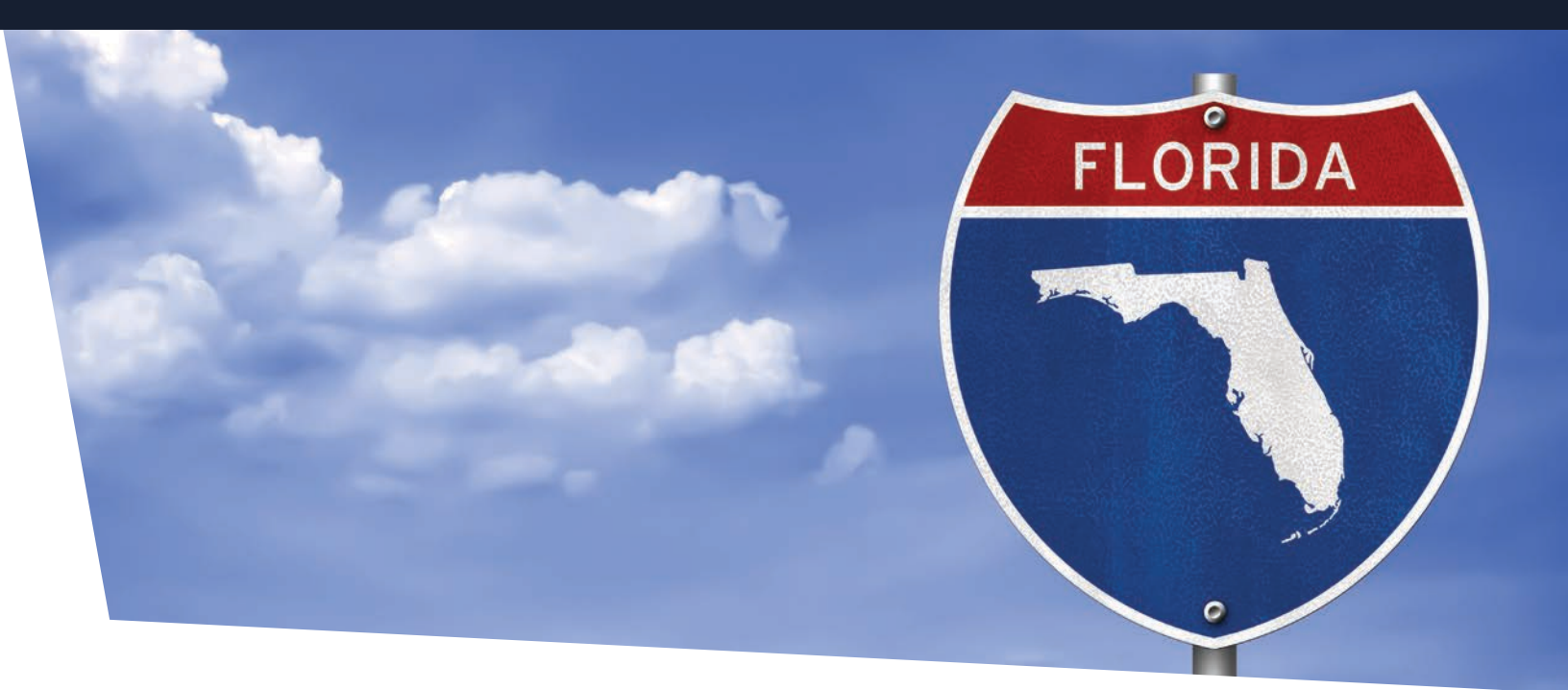
FY19/20 - FY20/21



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INTRODUCTION



INTRODUCTION RESEARCH OVERVIEW

Sports are an important driver of visitation and economic activity in the State of Florida that supports local jobs and income.

The Florida Sports Foundation (FSF) commissioned Tourism Economics to conduct a comprehensive economic impact analysis to quantify the significant contribution of the Florida sports economy, which includes the following segments:

- Amateur and leisure sports
- Professional sports
- Collegiate athletics
- Equine industry
- Retail sales

The study calculates the impacts for FY19/20 and FY20/21 (a fiscal year runs from July 1 through June 30).

To quantify the economic impacts, Tourism Economics prepared a comprehensive model using multiple primary and secondary data sources to quantify the impacts arising from the spending at sports venues and at off-site establishments by visitors attending a sporting event in Florida, as well

as the operational expenditures by teams, venues, tournament operators, and event organizers.

Impact modeling is based on an IMPLAN Input-Output (I-O) model for the State of Florida. The results of this study show the scope of the Florida sport's industry impact in terms of direct visitor spending, as well as total economic impacts, including employment, household income, and fiscal (tax) impacts.



TERMS & DEFINITIONS

The following terms were used in the report to define the Florida Sports Economy and its visitor patterns:

- **Non-resident Visitors:** visitors to Florida who are not residents of Florida
- **Resident Visitors:** visitors to a region in Florida who are from another Florida region (typically more than 50 miles away)
- **Non-Resident Sports Traveler Spending:** spending in the State of Florida by sports travelers who are not residents of Florida
- **Sports Economic Footprint:** spending in the State of Florida by resident and non-resident sports travelers, as well as operational spending by teams, sports venues, and event organizers.

INTRODUCTION

SUMMARY IMPACTS

THE FLORIDA SPORTS ECONOMY

SUMMARY ECONOMIC IMPACTS



28.1M

non-resident
visitors

Florida's sports industry accounted for nearly 28.1 million non-resident visitors to the state of Florida, representing 14% of all Florida tourism



\$25.2B

purchases

Attracted \$25.2 billion in purchases of goods and services from out-of-state buyers and visitors



\$71.7B

direct
sales

Generated \$71.7 billion in direct sales across the Florida economy



\$146.5B

total
sales

Generated \$146.5 billion in total sales across the Florida economy, including indirect and induced sales



978,200

average annualized
statewide jobs

Accounted for 978,200 jobs on an annual basis in Florida, including direct, indirect, and induced jobs



\$13.9B

state & local
taxes

Generated \$13.9 billion in revenues for state and local government coffers

INTRODUCTION

SUMMARY IMPACTS

FLORIDA SPORTS FOUNDATION AND REGIONAL SPORTS COMMISSIONS

SUMMARY ECONOMIC IMPACTS



10.7M

non-resident
visitors

Attracted nearly 10.7 million non-resident visitors to the state of Florida, representing 5% of all Florida tourism



\$8.6B

purchases

Generated \$8.6 billion in direct purchases of goods and services by non-resident visitors



\$13.2B

direct
sales

Generated \$13.2 billion in direct sales across the Florida economy



\$24.9B

total
sales

Generated a total economic impact of \$24.9 billion in sales across the Florida economy including indirect and induced sales



140,200

average annualized
statewide jobs

Generated more than 140,200 total jobs on an annual basis in Florida, including direct, indirect, and induced jobs



\$2.1B

state & local
taxes

Generated \$2.1 billion in revenues for state and local government coffers

The Florida Sports Foundation is a 501(c)3 not-for-profit corporation serving as the states lead sports development and promotional organization.

The mission of the Florida Sports Foundation is to:

- Assist Florida's communities with securing, hosting and retaining sporting events and sports related business that generate significant economic impact and sports-related tourism for the state of Florida through the Foundation's grant programs, legislative initiatives and Industry Partner service, recognition and development.
- Provide the citizens of Florida with participation opportunities in Florida's Sunshine State Games and Florida Senior Games events.
- Serve as Florida's leading resource for Sports Tourism research and facts.
- Assist in the promotion of targeted leisure sport industries in Florida.
- Assist National and Florida State Governing Bodies to promote amateur sport development through Florida's Sunshine State Games and hosting events in Florida.

REGIONAL SPORTS COMMISSIONS



1. Bradenton Area Sports
2. Citrus County Sports Development
3. Clay County Board of County Commissioners
4. Columbia County Sports Commission
5. Daytona Beach Area Convention & Visitors Bureau
6. Destin-Fort Walton Beach
7. Experience Florida's Sports Coast
8. Experience Kissimmee Sports Commission
9. Florida Citrus Sports & Events, Inc.
10. Gainesville Sports Commission
11. Greater Fort Lauderdale Sports
12. Greater Miami Convention and Visitors Bureau
13. Greater Orlando Sports Commission
14. Lee County Sports Development
15. Naples, Marco Island, Everglades Convention and Visitors Bureau
16. Ocala/Marion County Visitors & Convention Bureau
17. Orlando North Seminole County Sports
18. Palm Beach County Sports Commission
19. Palm Coast and the Flagler Beaches
20. Panama City Beach Convention & Visitors Bureau
21. Pensacola Sports
22. Polk County Sports Marketing
23. Punta Gorda / Englewood Beach Visitor & Convention Bureau
24. Putnam County
25. Santa Rosa County Board of County Commissioners
26. Sarasota County Sports Commission
27. Space Coast Office of Tourism
28. St. Augustine, Ponte Vedra and the Beaches CVB
29. St. Pete Clearwater Sports & Events
30. Tampa Bay Sports Commission
31. Treasure Coast Sports Commission
32. Visit Jacksonville
33. Visit Lake
34. Visit Orlando Sports
35. Visit Sebring
36. Visit Tallahassee Sports

RESEARCH APPROACH





RESEARCH APPROACH

DIRECT IMPACTS

Direct Impact Approach

The first step in economic impact analysis is to estimate direct spending impacts for each of the segments of the Florida sports economy. The direct spending impacts were divided into the following two types:

- 1. **Non-Resident Sports Traveler Spending:** spending by visitors to Florida who are not residents of Florida
- 2. **Sports Economic Footprint:** spending by resident and non-resident sports travelers, as well as operational spending. Resident visitors are visitors to a region in Florida who are from another Florida region (typically more than 50 miles away).

These direct impacts ultimately serve as the inputs for the economic impact model.

Direct Impact Summary

\$ billions

	Non-Resident Sports Traveler Spending	Sports Economic Footprint
Florida sports economy	\$25.2	\$71.7
Amateur and leisure sports	\$23.3	\$57.2
Professional sports	\$1.0	\$4.7
Collegiate athletics	\$0.5	\$2.5
Equine industry	\$0.4	\$2.5
Retail sales		\$4.7

Source: Tourism Economics
Note: sums may not total due to rounding

DIRECT SPENDING

IMPACT CATEGORIES

Direct spending impacts ultimately serve as inputs for the economic impact model. Direct spending impacts were divided into the following two categories:



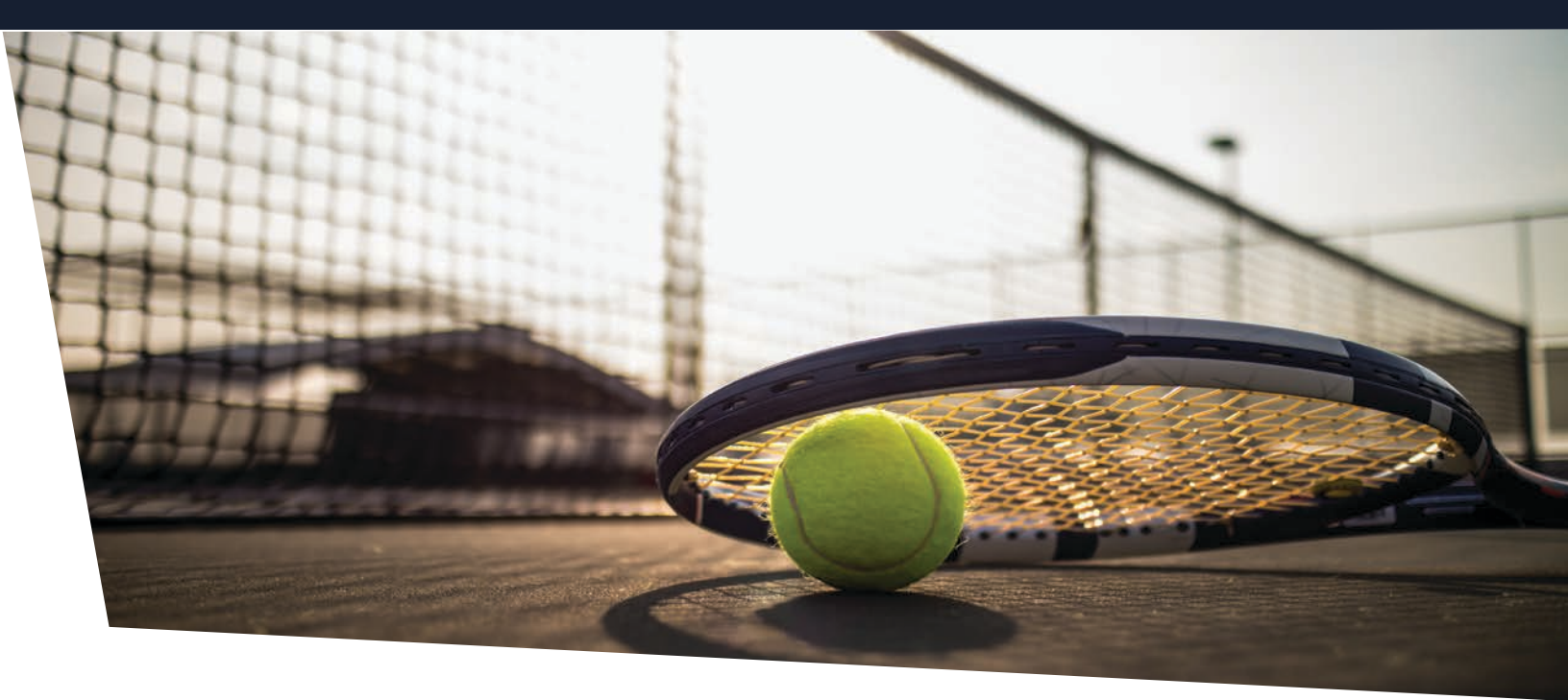
Non-Resident Sports Traveler Spending

Spending by visitors to Florida who are not residents of Florida



Sports Economic Footprint

Spending by resident and non-resident sports travelers, as well as operational spending. Resident visitors are visitors to a region in Florida who are from another Florida region (typically more than 50 miles away)



RESEARCH APPROACH

ECONOMIC IMPACT METHODOLOGY

Our analysis of economic impacts begins with direct spending (including local operating investment and resident and non-resident sports traveler spending) and also considers the downstream effects of this injection of spending into the local economy. To determine Florida sports' total economic impact, we input direct spending into a model of the state economy of Florida created in IMPLAN, which traces the full extent of industry impacts. IMPLAN is recognized as an industry standard in local-level input-output (I-O) models.

An I-O model represents a profile of an economy by measuring the relationships among industries and consumers and produces estimates of the following components:

- 1. Direct impacts:** Local operational spending by sports organizations and teams and off-site spending by resident and non-resident visitors create direct economic value within a discrete group of sectors (e.g. recreation, transportation). This supports a relative proportion of spending, jobs, wages, and taxes within each sector.
- 2. Indirect impacts:** Each directly affected sector also purchases goods and services as inputs (e.g. food wholesalers, utilities) into production. These impacts are called indirect impacts.
- 3. Induced impacts:** Lastly, the induced impact is generated when employees whose wages are generated either directly or indirectly by off-site spending and local operating investment, spend those wages in the local economy.

IMPLAN calculates three levels of impact - direct, indirect and induced - for a broad set of indicators. These include the following:

- Spending
- Wages
- Employment
- Federal Taxes
- State Taxes
- Local Taxes

ECONOMIC IMPACT FRAMEWORK

Direct Impacts



RETAIL



ENTERTAINMENT/REC



FOOD & BEVERAGE



LOCAL TRANSPORTATION



LODGING



LOCAL OPERATIONAL
SPENDING

Indirect Impacts



SUPPLY CHAIN
EFFECTS



B2B GOODS &
SERVICES
PURCHASES

Induced Impacts



INCOME
EFFECT



HOUSEHOLD
CONSUMPTION



SALES



GDP



JOBS



WAGES



TAXES

ECONOMIC IMPACT SUMMARY

The Florida sports economy generated \$146.5 billion in total output.

The total economic impact of the Florida sports economy amounted to \$146.5 billion in FY19/20 and FY20/21, including spending by resident and non-resident sport travelers, as well as operational spending. This total economic impact of \$146.5 billion supported 978,200 part-time and full-time jobs on an annual basis and generated \$13.9 billion in state and local taxes. The table on the accompanying page outlines the summary economic impacts of the Florida sports economy for FY19/20 and FY20/21.

Summary Economic Impacts: Florida Sports Economy
\$ billions and jobs

	Total Output	Average Annualized Jobs	Total State & Local Taxes
Sports economic footprint	\$146.5	978,200	\$13.9
Amateur and leisure sports	\$113.6	716,300	\$10.5
Professional sports	\$10.2	74,200	\$1.0
Collegiate athletics	\$5.5	41,500	\$0.6
Equine industry	\$6.1	51,600	\$0.7
Retail sales	\$11.2	94,700	\$1.2

Source: Tourism Economics
Note: sums may not total due to rounding

Summary Economic Impacts: Florida Sports Economy FY19/20 to FY20/21

Millions of sports travelers, \$ billions, and jobs

	FY19/20	FY20/21
Total economic footprint		
Direct output (\$ billions)	\$35.6	\$36.1
Amateur and leisure sports	\$27.8	\$29.4
Professional sports	\$2.7	\$2.0
Collegiate athletics	\$1.6	\$0.9
Equine industry	\$1.2	\$1.4
Retail sales	\$2.3	\$2.4
Total output (\$ billions)	\$72.8	\$73.7
Amateur and leisure sports	\$55.4	\$58.2
Professional sports	\$5.7	\$4.5
Collegiate athletics	\$3.4	\$2.1
Equine industry	\$2.8	\$3.3
Retail sales	\$5.4	\$5.7
Total jobs	963,600	992,700
Amateur and leisure sports	695,400	737,200
Professional sports	80,600	67,700
Collegiate athletics	48,900	34,100
Equine industry	47,300	55,800
Retail sales	91,400	97,900
Total state & local taxes (\$ billions)	\$6.9	\$7.0
Amateur and leisure sports	\$5.1	\$5.4
Professional sports	\$0.6	\$0.5
Collegiate athletics	\$0.3	\$0.2
Equine industry	\$0.3	\$0.4
Retail sales	\$0.6	\$0.6
Total sports travelers (millions of travelers)	36.8	33.3
Non-resident sports travelers (millions of travelers)	14.3	13.8
Amateur and leisure sports	12.6	13.1
Professional sports	0.9	0.6
Collegiate athletics	0.8	0.1
Resident sports travelers (millions of travelers)	22.4	19.5
Amateur and leisure sports	17.7	18.1
Professional sports	3.0	1.2
Collegiate athletics	1.7	0.2

Source: Tourism Economics
Note: sums may not total due to rounding

KEY FINDINGS



FLORIDA SPORTS INDUSTRY

SUMMARY ECONOMIC IMPACTS

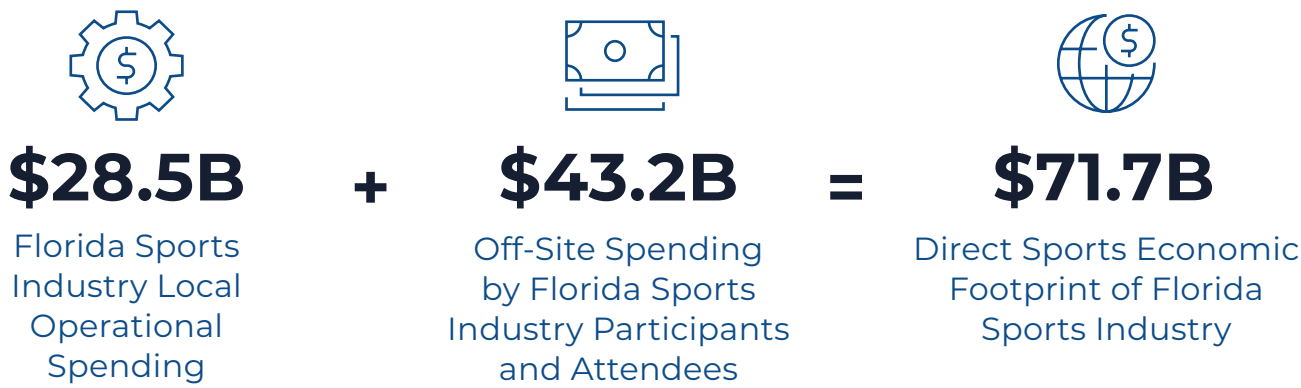
DIRECT SPENDING IMPACTS

Sports generated significant economic impacts in the State of Florida as teams, venues, and event operators spent money in the Florida economy to sustain operations, including spending on payroll, marketing, and general and administrative expenses.

In addition, resident and non-resident visitors that attended or participated in a sporting event in Florida spent money while at the sporting event and at off-site establishments during their stay, including at local restaurants, hotels, retailers, and recreation/entertainment venues.

Total direct spending associated with the sports economy in Florida amounted to \$71.7 billion.

SUMMARY DIRECT IMPACTS



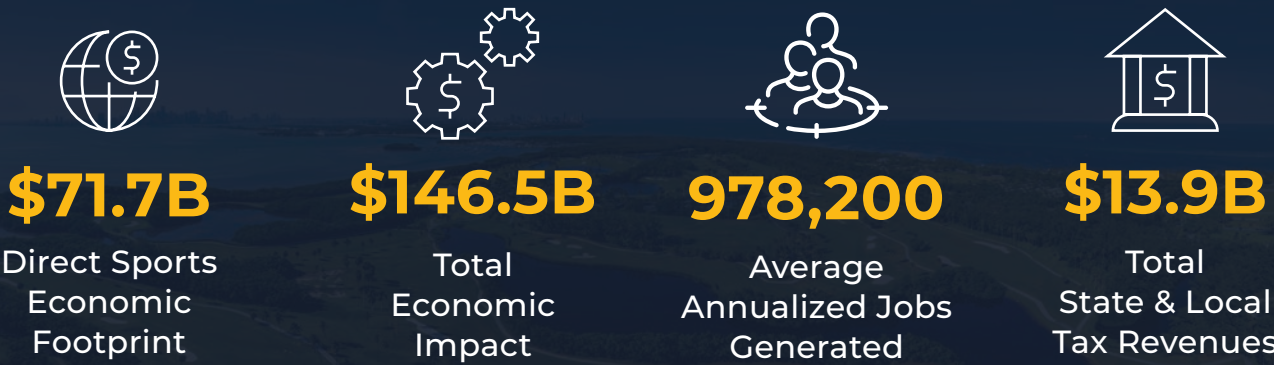
TOTAL ECONOMIC IMPACTS

The Florida sports industry's direct spending impact of \$71.7 billion generated a total economic impact of \$146.5 billion in the Florida economy, which supported 978,200 part-time and full-time jobs on an annual basis and generated \$13.9 billion in state and local taxes.



SUMMARY ECONOMIC IMPACTS FLORIDA SPORTS INDUSTRY

In FY19/20 and FY20/21, the Florida sports industry had a direct sports economic footprint of \$71.7 billion, including off-site spending by resident and non-resident visitors and local operational spending. This spending generated a total statewide economic impact of \$146.5 billion and supported 978,200 total jobs on an annual basis in Florida. The total economic impact of \$146.5 billion generated approximately \$13.9 billion in total state and local tax revenues.



AMATEUR & LEISURE SPORTS

SUMMARY ECONOMIC IMPACTS

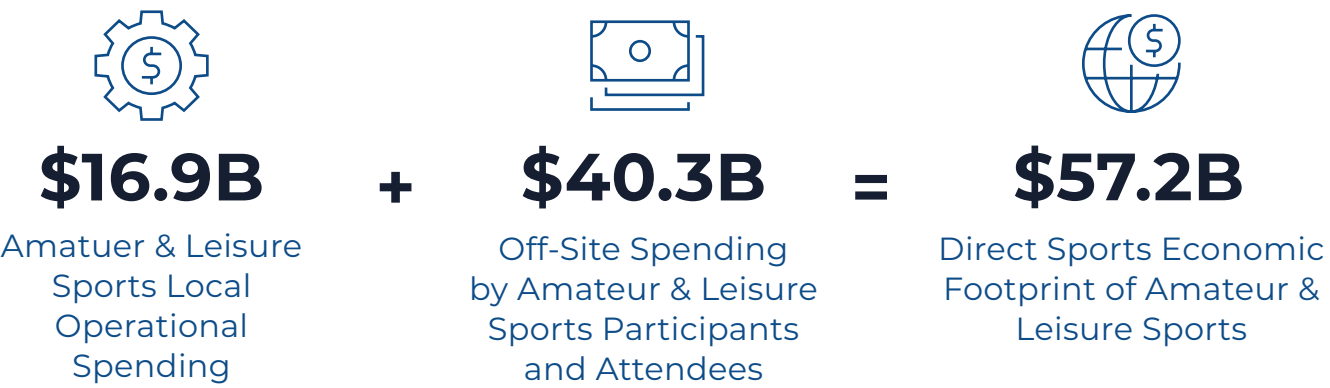
DIRECT SPENDING IMPACTS

Amateur and leisure sports generated significant economic impacts in the State of Florida as venues and event operators spent money in the Florida economy to sustain operations, including spending on payroll, marketing, and general and administrative expenses.

In addition, resident and non-resident visitors that attended or participated in amateur and leisure sports in Florida spent money while at the sporting event and at off-site establishments during their stay, including at local restaurants, hotels, retailers, and recreation/entertainment venues.

Total direct spending associated with amateur and leisure sports in Florida amounted to \$57.2 billion.

SUMMARY DIRECT IMPACTS



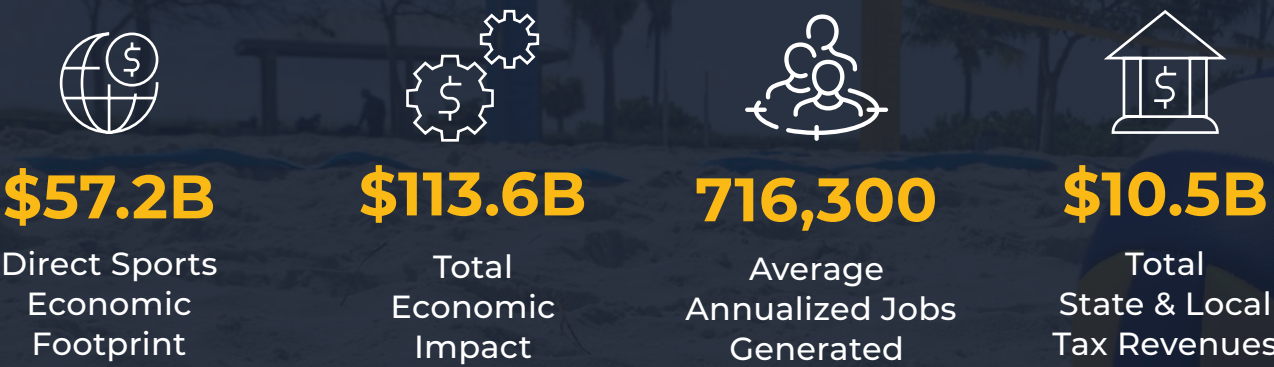
TOTAL ECONOMIC IMPACTS

Amateur and leisure sports' direct spending impact of \$57.2 billion generated a total economic impact of \$113.6 billion in the Florida economy, which supported 716,300 part-time and full-time jobs on an annual basis and generated \$10.5 billion in state and local taxes.



SUMMARY ECONOMIC IMPACTS AMATEUR & LEISURE SPORTS

In FY19/20 and FY20/21, amateur and leisure sports had a direct sports economic footprint of \$57.2 billion, including off-site spending by resident and non-resident visitors and local operational spending. This spending generated a total statewide economic impact of \$113.6 billion and supported 716,300 total jobs on an annual basis in Florida. The total economic impact of \$113.6 billion generated approximately \$10.5 billion in total state and local tax revenues.



PROFESSIONAL SPORTS

SUMMARY ECONOMIC IMPACTS

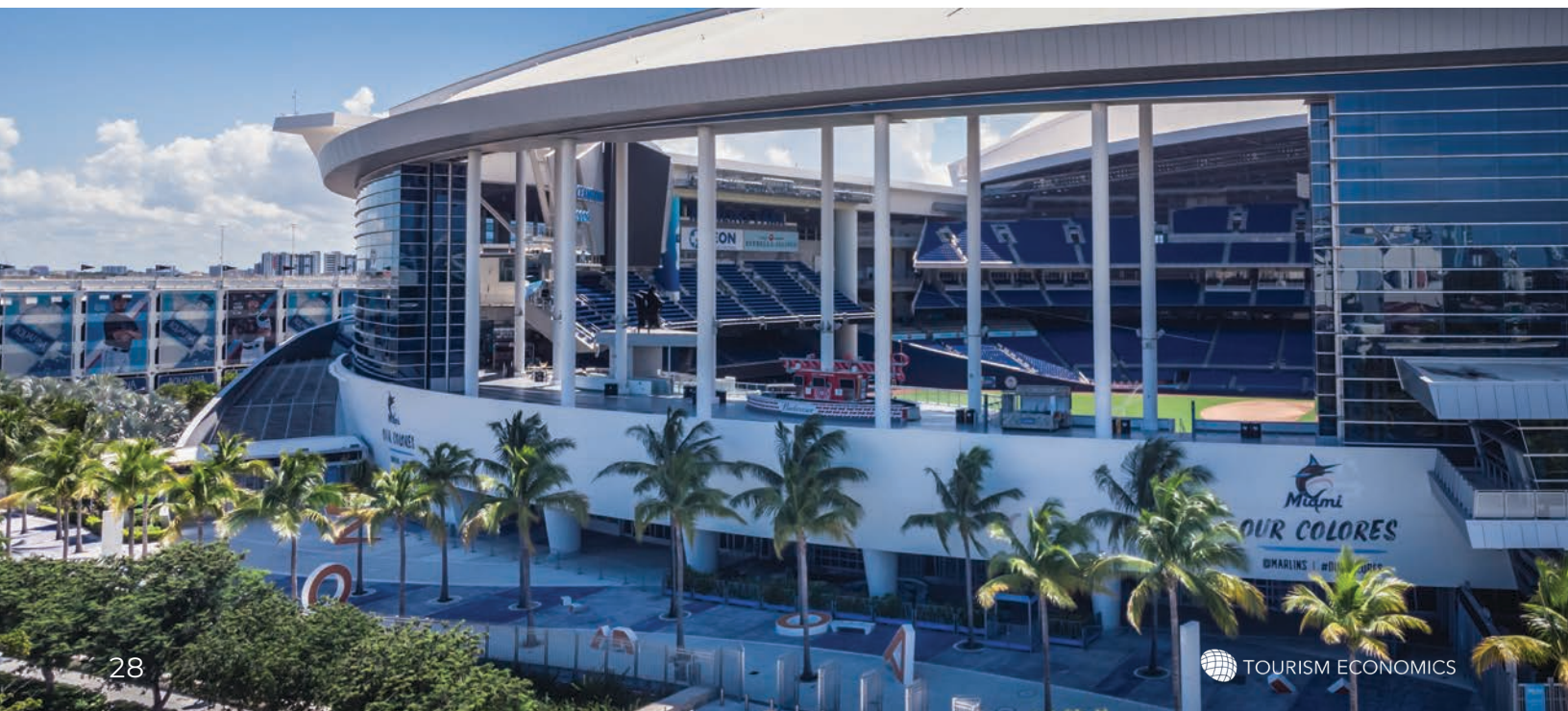
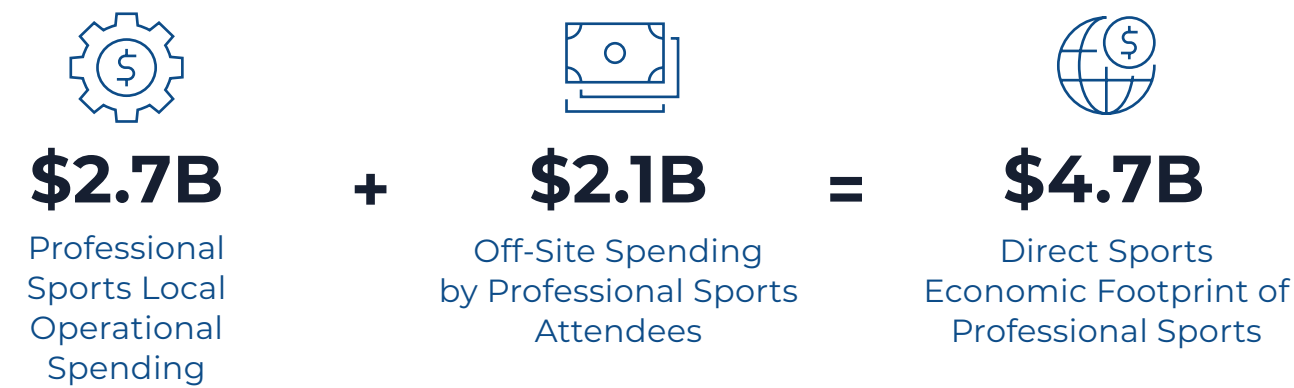
DIRECT SPENDING IMPACTS

Professional sports generated significant economic impacts in the State of Florida as teams and venues spent money in the Florida economy to sustain operations, including spending on payroll, marketing, and general and administrative expenses.

In addition, resident and non-resident visitors that attended a professional sporting event in Florida spent money while at the sporting event and at off-site establishments during their stay, including at local restaurants, hotels, retailers, and recreation/entertainment venues.

Total direct spending associated with professional sports in Florida amounted to \$4.7 billion.

SUMMARY DIRECT IMPACTS



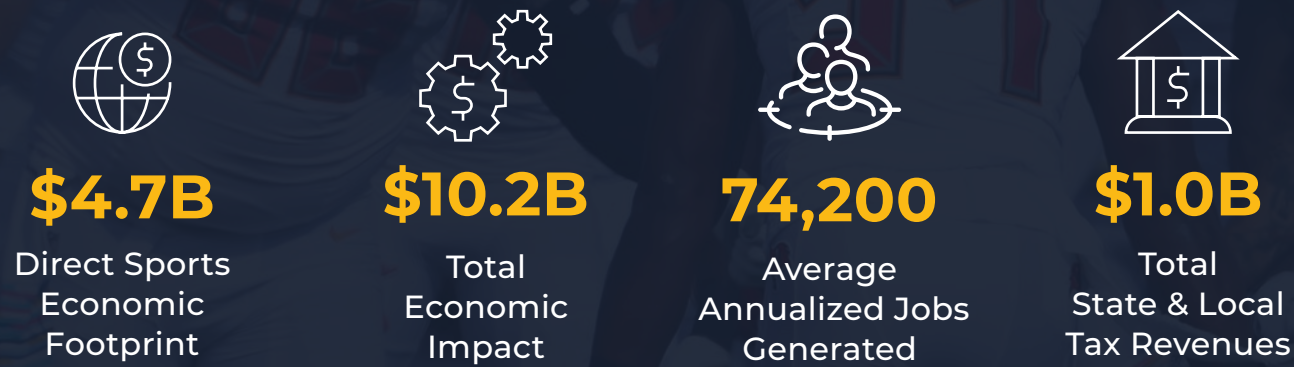
TOTAL ECONOMIC IMPACTS

Professional sports' direct spending impact of \$4.7 billion generated a total economic impact of \$10.2 billion in the Florida economy, which supported 74,200 part-time and full-time jobs on an annual basis and generated \$1.0 billion in state and local taxes.



SUMMARY ECONOMIC IMPACTS PROFESSIONAL SPORTS

In FY19/20 and FY20/21, professional sports had a direct sports economic footprint of \$4.7 billion, including off-site spending by resident and non-resident visitors and local operational spending. This spending generated a total statewide economic impact of \$10.2 billion and supported 74,200 total jobs on an annual basis in Florida. The total economic impact of \$10.2 billion generated approximately \$1.0 billion in total state and local tax revenues.



COLLEGIATE ATHLETICS

SUMMARY ECONOMIC IMPACTS

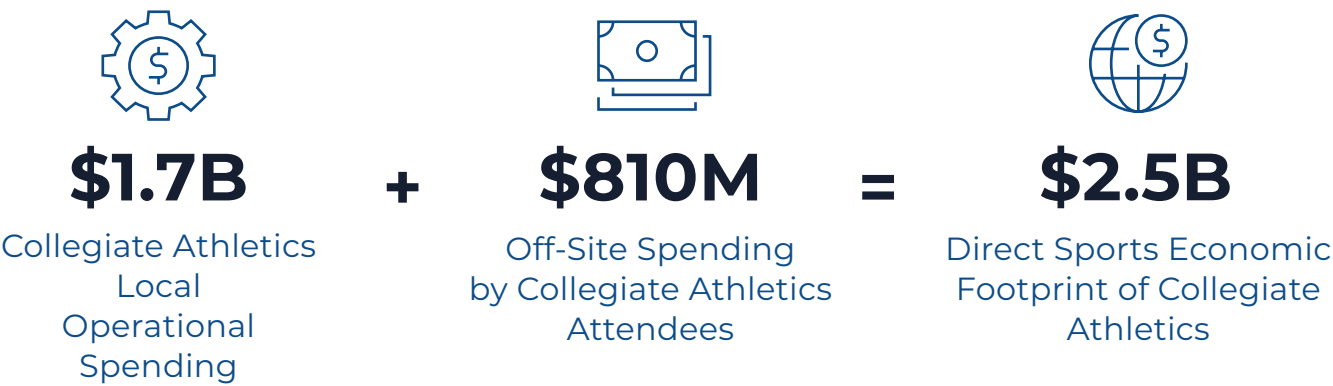
DIRECT SPENDING IMPACTS

Collegiate athletics generated significant economic impacts in the State of Florida as collegiate athletic departments spent money in the Florida economy to sustain operations, including spending on payroll, marketing, and general and administrative expenses.

In addition, resident and non-resident visitors that attended a collegiate sporting event in Florida spent money while at the sporting event and at off-site establishments during their stay, including at local restaurants, hotels, retailers, and recreation/entertainment venues.

Total direct spending associated with collegiate athletics in Florida amounted to \$2.5 billion.

SUMMARY DIRECT IMPACTS



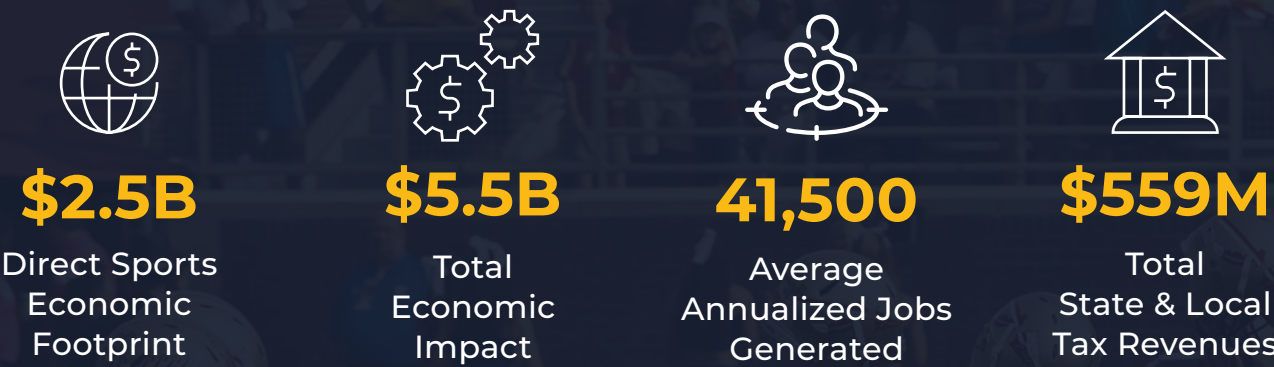
TOTAL ECONOMIC IMPACTS

Collegiate athletics' direct spending impact of \$2.5 billion generated a total economic impact of \$5.5 billion in the Florida economy, which supported 41,500 part-time and full-time jobs on an annual basis and generated \$559 million in state and local taxes.



SUMMARY ECONOMIC IMPACTS COLLEGIATE ATHLETICS

In FY19/20 and FY20/21, collegiate athletics had a direct sports economic footprint of \$2.5 billion, including off-site spending by resident and non-resident visitors and local operational spending. This spending generated a total statewide economic impact of \$5.5 billion and supported 41,500 total jobs on an annual basis in Florida. The total economic impact of \$5.5 billion generated approximately \$559.4 million in total state and local tax revenues.



EQUINE INDUSTRY

SUMMARY ECONOMIC IMPACTS

DIRECT SPENDING IMPACTS

The equine industry generated significant economic impacts in the State of Florida as breeders, horse parks, and farms spent money in the Florida economy to sustain operations, including spending on payroll, marketing, and general and administrative expenses.

In addition, resident and non-resident visitors that attended an equine event in Florida spent money while at the equine event and at off-site establishments during their stay, including at local restaurants, hotels, retailers, and recreation/entertainment venues.

Total direct spending associated with the equine industry in Florida amounted to \$2.5 billion.

SUMMARY DIRECT IMPACTS



\$2.5B

Direct Sports Economic
Footprint of the Equine
Industry



TOTAL ECONOMIC IMPACTS

The equine industry's direct spending impact of \$2.5 billion generated a total economic impact of \$6.1 billion in the Florida economy, which supported 51,600 part-time and full-time jobs on an annual basis and generated \$673 million in state and local taxes.



\$6.1 BILLION

Total Economic Impact of the Equine Industry

SUMMARY ECONOMIC IMPACTS EQUINE INDUSTRY

In FY19/20 and FY20/21, the equine industry had a direct sports economic footprint of \$2.5 billion. This spending generated a total statewide economic impact of \$6.1 billion and supported 51,600 total jobs on an annual basis in Florida. The total economic impact of \$6.1 billion generated approximately \$672.8 million in total state and local tax revenues.



\$2.5B

Direct Sports
Economic
Footprint



\$6.1B

Total
Economic
Impact



51,600

Average
Annualized Jobs
Generated



\$673M

Total
State & Local
Tax Revenues



RETAIL SALES

SUMMARY ECONOMIC IMPACTS

DIRECT SPENDING IMPACTS

The sports retail industry generated significant economic impacts in the State of Florida as resident and non-resident visitors spent substantial amounts of money on sports clothing, footwear, and equipment.

Total direct spending associated with retail sales in Florida amounted to \$4.7 billion.

SUMMARY DIRECT IMPACTS



\$4.7B

Direct Sports Economic
Footprint of Retail Sales



TOTAL ECONOMIC IMPACTS

The direct spending impact of \$4.7 billion generated a total economic impact of \$11.2 billion in the Florida economy, which supported 94,700 part-time and full-time jobs on an annual basis and generated \$1.2 billion in state and local taxes.



\$11.2 BILLION

Total Economic Impact of Retail Sales

SUMMARY ECONOMIC IMPACTS RETAIL SALES

In FY19/20 and FY20/21, the sports retail industry had a direct sports economic footprint of \$4.7 billion. This spending generated a total statewide economic impact of \$11.2 billion and supported 94,700 total jobs on an annual basis in Florida. The total economic impact of \$11.2 billion generated approximately \$1.2 billion in total state and local tax revenues.



\$4.7B

Direct Sports
Economic
Footprint



\$11.2B

Total
Economic
Impact



94,700

Average
Annualized Jobs
Generated



\$1.2B

Total
State & Local
Tax Revenues





AMATEUR & LEISURE SPORTS

AMATEUR & LEISURE SPORTS

The amateur and leisure sports component of the Florida sports economy generated \$113.6 billion in total output.

The amateur and leisure sports segment of the Florida sports economy is composed of the following six sub-segments:

- Florida Sports Foundation and regional commissions
- Golf
- Hunting
- Fishing
- Wildlife viewing
- Parks and recreation

DETAILED ECONOMIC IMPACTS: AMATEUR & LEISURE SPORTS

\$ millions and jobs

	Output		Jobs		State & Local Taxes	
	Direct	Total	Direct	Total	Direct	Total
Sports Economic Footprint	\$57,227	\$113,580	524,200	716,300	\$6,719	\$10,468
FSF and regional commissions	\$13,176	\$24,944	103,200	140,200	\$1,355	\$2,142
Golf	\$21,271	\$44,167	221,300	303,300	\$2,756	\$4,274
Hunting	\$610	\$1,038	3,400	4,700	\$58	\$86
Fishing	\$9,237	\$16,414	59,800	81,200	\$872	\$1,354
Wildlife viewing	\$7,015	\$12,885	49,600	67,000	\$656	\$1,048
Parks and recreation	\$5,917	\$14,132	86,900	119,800	\$1,022	\$1,565

Source: Tourism Economics
Note: sums may not total due to rounding

SUMMARY ECONOMIC IMPACTS: AMATEUR & LEISURE SPORTS

In FY19/20 and FY20/21, amateur and leisure sports had a direct sports economic footprint of \$57.2 billion, including off-site spending by resident and non-resident visitors and local operational spending. This spending generated a total statewide economic impact of \$113.6 billion and supported 716,300 total jobs on an annual basis in Florida. The total economic impact of \$113.6 billion generated approximately \$10.5 billion in total state and local tax



\$57.2B

Direct Sports
Economic
Footprint



\$113.6B

Total
Economic
Impact



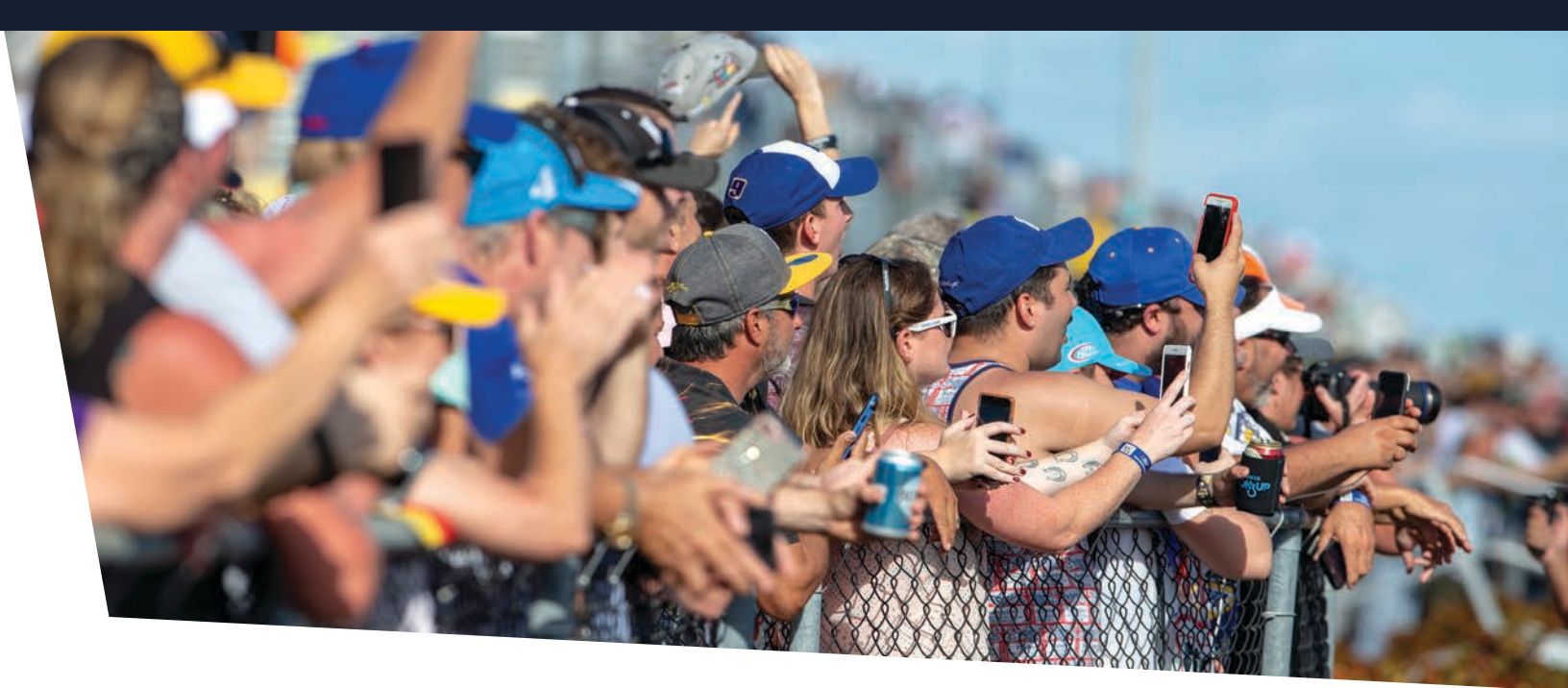
716,300

Average
Annualized Jobs
Generated



\$10.5B

Total
State & Local
Tax Revenues



AMATEUR & LEISURE SPORTS FSF AND REGIONAL COMMISSIONS

Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 25.7 million resident and non-resident sports travelers attended a sporting event in Florida promoted or developed by FSF or a regional commission.

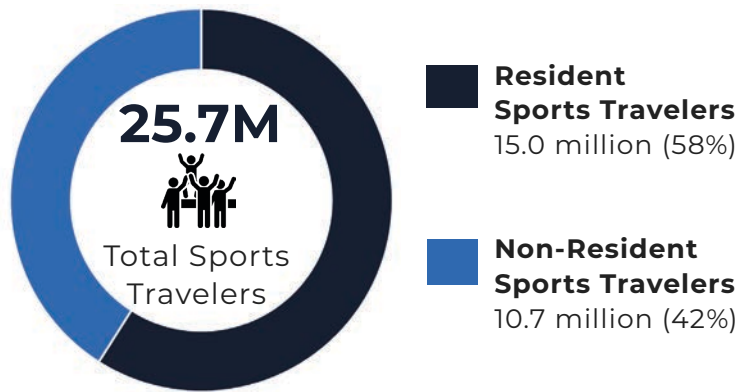
There are more than 30 regional sports commissions in Florida responsible for promoting and marketing their community as a sports tourism destination. Each of these destinations host, and in some cases develops, amateur and leisure sporting events.

In addition to the regional sports commissions, the FSF promotes and develops sporting events for the State of Florida. The FSF offers a grant program that supports sporting events in Florida and also is responsible for the Sunshine State Games and the Florida Senior Games.

In FY19/20 and FY20/21, 25.7 million resident and non-resident sports travelers attended (either as a participant or spectator) a sporting event promoted or developed by FSF or a regional commission – 10.7 million or 42% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for the sporting events.

Sports Travelers by Type: FSF & Regional Commissions

Number of travelers and percentage share



Source: regional sports commissions, Florida Sports Foundation, Visit Florida

AMATEUR & LEISURE SPORTS FSF AND REGIONAL COMMISSIONS

Non-Resident Sports Traveler Spending

Non-resident sports travelers spent \$8.6 billion across a wide range of sectors in Florida in FY19/20 and FY20/21.

The 10.7 million non-resident sports travelers spent \$8.6 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/ entertainment venues.

The off-site spending by non-resident sports travelers attending a sporting event promoted or developed by FSF or a regional commission was spread across a number of industries, including \$2.3 billion in spending in the food and beverage industry, \$2.2 billion in the lodging industry, \$1.6 billion in the recreation and entertainment industry, \$1.4 billion in retail, and \$1.1 billion in local transportation.



\$8.6 BILLION

FSF & Regional Commissions:
Non-Resident Sports Traveler Spending



\$2.3B FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$2.2B LODGING

Hotels, motels, private home rentals, RVs



\$1.6B RECREATION

Amusements, theaters, entertainment, and other recreation



\$1.4B RETAIL

Souvenirs, general merchandise, malls, local retailers



\$1.1B LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

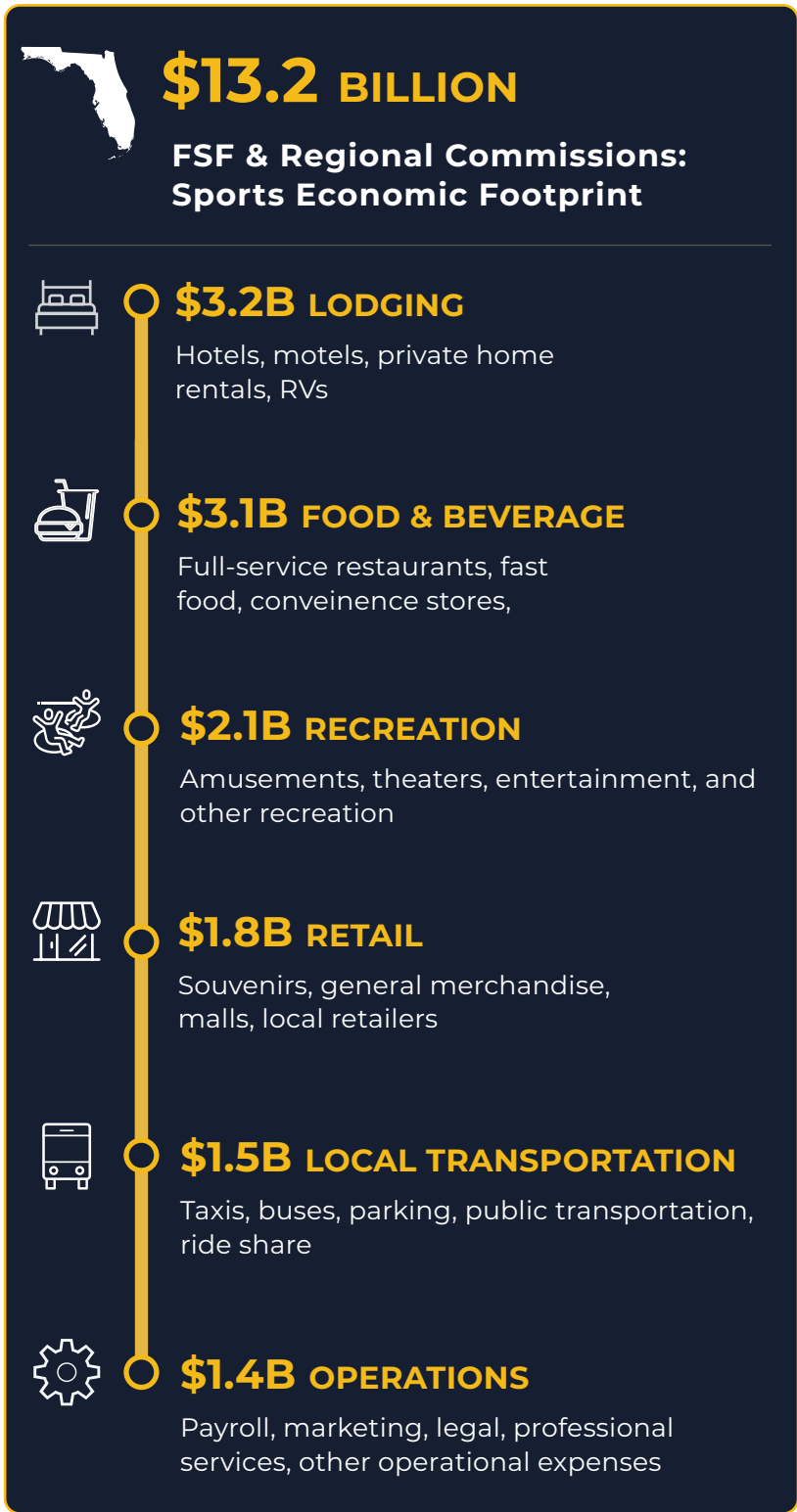
AMATEUR & LEISURE SPORTS FSF AND REGIONAL COMMISSIONS

Sports Economic Footprint

Resident and non-resident sports travelers, event organizers, and venues across Florida spent \$13.2 billion across a wide range of sectors in FY19/20 and FY20/21.

The 25.7 million resident and nonresident sports travelers, event organizers, and venues spent \$13.2 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at sports facilities during the sporting events.

The spending by resident and nonresident sports travelers, event organizers, and venues was spread across a number of industries, including \$3.2 billion in the lodging industry, \$3.1 billion in spending in the food and beverage industry, \$2.1 billion in the recreation and entertainment industry, \$1.8 billion in retail, \$1.5 billion in local transportation, and \$1.4 billion in operational spending.



AMATEUR & LEISURE SPORTS FSF AND REGIONAL COMMISSIONS

ECONOMIC IMPACTS OF THE FSF & REGIONAL COMMISSIONS

The \$13.2 billion spent by resident and non-resident sports travelers, event organizers, and venues in FY19/20 and FY20/21 generated \$24.9 billion in total output, which includes indirect and induced impacts.

The FSF and regional commissions direct spending impact of \$13.2 billion, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$24.9 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$24.9 billion supported 140,200 full-time and part-time jobs on an annual basis and sustained \$2.1 billion in state and local taxes.



AMATEUR & LEISURE SPORTS

FSF AND REGIONAL COMMISSIONS

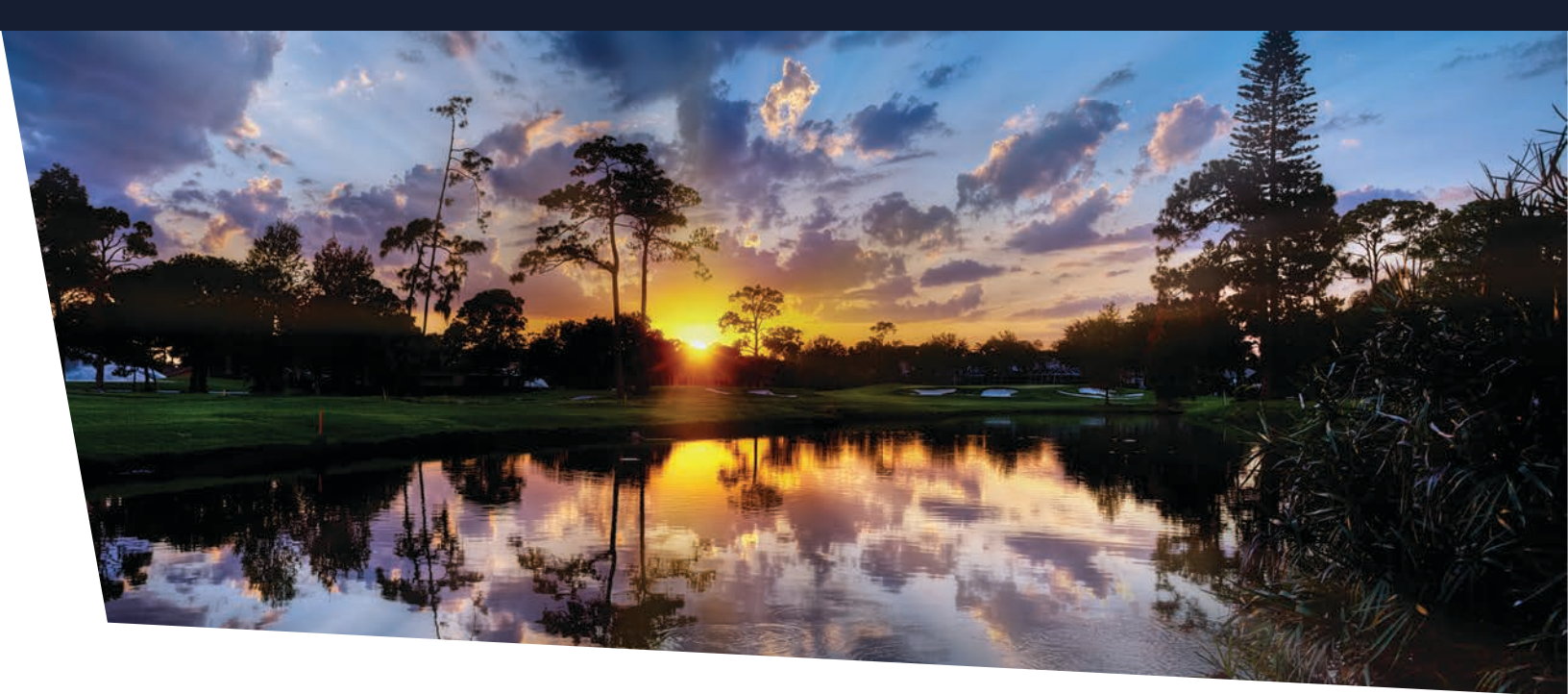
Economic Impact Summary: FSF & Regional Commissions

Millions of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (millions of travelers)	12.5	13.2
Non-Resident	5.1	5.6
Resident	7.4	7.6
Sports economic footprint (\$ millions and jobs)		
Direct output	\$6,165	\$7,012
Total output	\$11,721	\$13,223
Total jobs	131,420	149,070
Total state & local taxes	\$1,005	\$1,137

Source: Tourism Economics
Note: sums may not total due to rounding





AMATEUR & LEISURE SPORTS GOLF

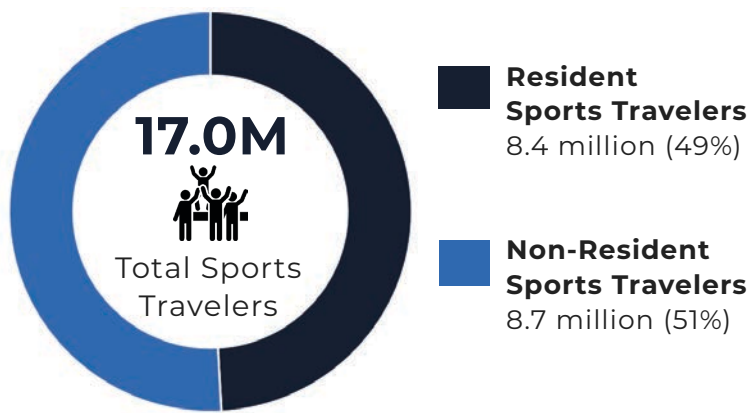
Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 17.0 million resident and non-resident sports travelers played golf or attended a professional golf tournament in Florida.

Golf, which includes both leisure and professional golf, is a major contributor to the Florida economy. The state's subtropical climate allows golfers to play year-round. In addition to paying to play golf or to attend a professional golf tournament, golf visitors also spent money on golf supplies as well as tourism related expenditures (i.e. lodging, food and beverage, retail, entertainment, and transportation). Golf courses and tournament operators also spent money on operating the facilities and tournaments.

In FY19/20 and FY20/21, 17.0 million resident and non-resident sports travelers played golf or attended a professional golf tournament in Florida – 8.7 million or 51% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for golf.

Sports Travelers by Type: Golf
Number of travelers and percentage share



Source: Visit Florida, Golf Datatech, IBISWorld, SRI International, golf tournaments

AMATEUR & LEISURE SPORTS GOLF

Non-Resident Sports Traveler Impacts

Non-resident golf travelers spent \$7.0 billion across a wide range of sectors in Florida in FY19/20 and FY20/21.

The 8.7 million non-resident golf travelers spent \$7.0 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/ entertainment venues.

The off-site spending by non-resident golf travelers was spread across a number of industries, including \$1.9 billion in the lodging industry, \$1.7 billion in spending in the food and beverage industry, \$1.3 billion in retail, \$1.2 billion in the recreation and entertainment industry, and \$842 million in local transportation.



\$7.0 BILLION

**Golf Non-Resident Sports
Travelers Spending**



\$1.9B LODGING

Hotels, motels, private home rentals, RVs



\$1.7B FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$1.3B RETAIL

Golf supplies, souvenirs, general merchandise, malls, local retailers



\$1.2B RECREATION

Amusements, theaters, entertainment, and other recreation



\$0.8B LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

AMATEUR & LEISURE SPORTS GOLF

Sports Economic Footprint

Resident and non-resident golf travelers, golf tournament operators, and golf courses across Florida spent \$21.3 billion across a wide range of sectors in FY19/20 and FY20/21.

The 17.0 million resident and non-resident golf travelers, golf tournament operators, and golf courses spent \$21.3 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at golf courses and golf tournaments.

The spending by resident and nonresident golf travelers, golf tournament operators, and golf courses was spread across a number of industries, including \$9.6 billion in operational spending, \$3.0 billion in the lodging industry, \$2.9 billion in spending in the food and beverage industry, \$2.3 billion in retail, \$2.1 billion in the recreation and entertainment industry, and \$1.4 billion in local transportation.



AMATEUR & LEISURE SPORTS GOLF

ECONOMIC IMPACTS OF GOLF

The \$21.3 billion spent by golf travelers, golf tournament operators, and golf courses in FY19/20 and FY20/21 generated \$44.2 billion in total output, which includes indirect and induced impacts.

The golf direct spending impact of \$21.3 billion, which includes operational spending and spending by resident and non-resident golf travelers, generated a total economic impact of \$44.2 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$44.2 billion supported 303,300 full-time and part-time jobs on an annual basis and sustained \$4.3 billion in state and local taxes.



AMATEUR & LEISURE SPORTS
GOLF

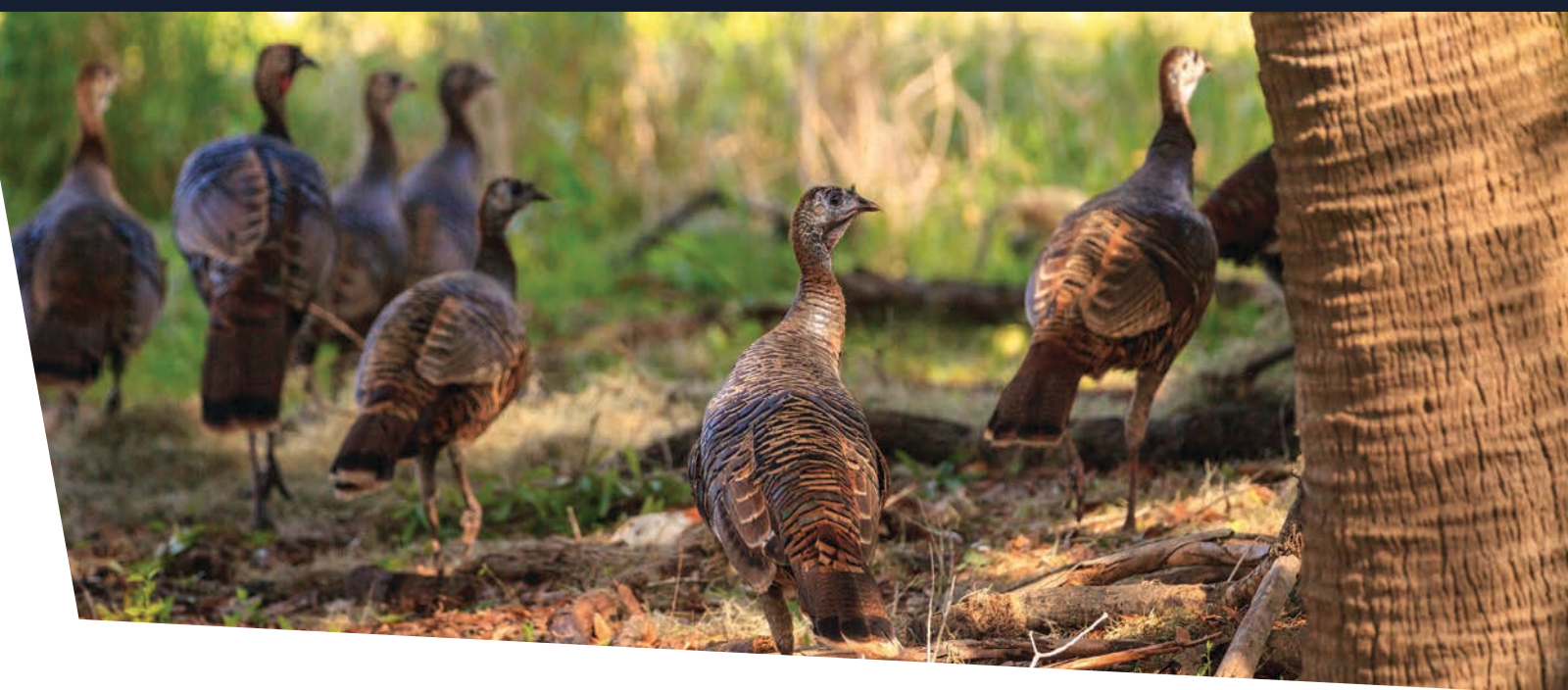
Economic Impact Summary: Golf

Millions of golf travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (millions of travelers)	8.5	8.5
Non-Resident	4.4	4.3
Resident	4.1	4.2
Sports economic footprint (\$ millions and jobs)		
Direct output	\$10,526	\$10,745
Total output	\$21,923	\$22,244
Total jobs	299,170	307,430
Total state & local taxes	\$2,122	\$2,152

Source: Tourism Economics
Note: sums may not total due to rounding





AMATEUR & LEISURE SPORTS HUNTING

Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 632,000 resident and non-resident sports travelers hunted in Florida.

Hunting is a popular fall and winter sport in Florida, particularly in the Northwest part of the state, for both Florida residents and visitors. Visitors that traveled to Florida or within Florida to hunt spent money on hunting supplies and tourism related expenditures (i.e. lodging, food and beverage, retail, entertainment, and transportation).

In FY19/20 and FY20/21, 632,000 resident and nonresident sports travelers hunted in Florida – 78,000 or 12% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for hunting.

Sports Travelers by Type: Hunting
Number of travelers and percentage share



Source: U.S. Fish & Wildlife Service, Florida Sports Foundation

AMATEUR & LEISURE SPORTS HUNTING

Non-Resident Sports Traveler Spending

Non-resident hunters spent \$99.6 million across a wide range of sectors in Florida in FY19/20 and FY20/21.

The 78,000 non-resident hunters spent \$99.6 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The off-site spending by non-resident hunters was spread across a number of industries, including \$42.9 million in retail, \$20.1 million in the lodging industry, \$17.7 million in spending in the food and beverage industry, \$10.3 million in the recreation and entertainment industry, and \$8.5 million in local transportation.



\$99.6 MILLION

Hunting: Non-Resident Sports Traveler Spending



\$42.9M RETAIL

Hunting supplies, souvenirs, general merchandise, malls, local retailers



\$20.1M LODGING

Hotels, motels, private home rentals, RVs



\$17.7M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$10.3M RECREATION

Amusements, theaters, entertainment, and other recreation



\$8.5M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

AMATEUR & LEISURE SPORTS HUNTING

Sports Economic Footprint

Resident and non-resident hunters spent \$610.4 million across a wide range of sectors in FY19/20 and FY20/21.

The 632,000 resident and non-resident hunters spent \$610.4 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The spending by resident and nonresident hunters was spread across a number of industries, including \$260.9 million in retail, \$148.4 million in the lodging industry, \$97.5 million in spending in the food and beverage industry, \$56.8 million in the recreation and entertainment industry, and \$46.8 million in local transportation.



AMATEUR & LEISURE SPORTS HUNTING

ECONOMIC IMPACTS OF HUNTING

The \$610.4 million spent by resident and non-resident hunters in FY19/20 and FY20/21 generated \$1.0 billion in total output, which includes indirect and induced impacts.

The hunting direct spending impact of \$610.4 million generated a total economic impact of \$1.0 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$1.0 billion supported 4,700 full-time and part-time jobs on an annual basis and sustained \$85.8 million in state and local taxes.



AMATEUR & LEISURE SPORTS
HUNTING

Economic Impact Summary: Hunting

Thousands of hunters, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (thousands of travelers)	321.3	310.7
Non-Resident	37.9	39.8
Resident	283.4	271.0
Sports economic footprint (\$ millions and jobs)		
Direct output	\$306	\$304
Total output	\$521	\$517
Total jobs	4,660	4,680
Total state & local taxes	\$43	\$43

Source: Tourism Economics
Note: sums may not total due to rounding





AMATEUR & LEISURE SPORTS FISHING

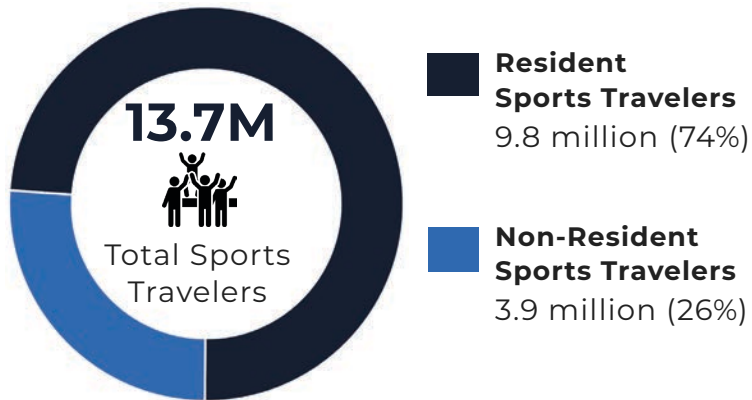
Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 13.7 million resident and non-resident sports travelers fished in Florida.

Florida’s endless coastline and numerous freshwater lakes make fishing a popular year-round sport for both Florida residents and visitors. Visitors that traveled to Florida or within Florida to fish spent money on fishing supplies and tourism related expenditures (i.e. lodging, food and beverage, retail, entertainment, and transportation).

In FY19/20 and FY20/21, 13.7 million resident and non-resident sports travelers fished in Florida – 3.9 million or 28% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for fishing.

Sports Travelers by Type: Fishing
Number of travelers and percentage share



Source: U.S. Fish & Wildlife Service, Florida Sports Foundation

AMATEUR & LEISURE SPORTS FISHING

Non-Resident Sports Traveler Spending

Non-resident fishers spent \$3.6 billion across a wide range of sectors in Florida in FY19/20 and FY20/21.

The 3.9 million non-resident fishers spent \$3.6 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/ entertainment venues.

The off-site spending by non-resident fishers was spread across a number of industries, including \$1.0 billion in retail, \$907.2 million in the lodging industry, \$792.6 million in spending in the food and beverage industry, \$490.7 million in the recreation and entertainment industry, and \$436.2 million in local transportation.



AMATEUR & LEISURE SPORTS FISHING

Sports Economic Footprint

Resident and non-resident fishers spent \$9.2 billion across a wide range of sectors in FY19/20 and FY20/21.

The 13.7 million resident and non-resident fishers spent \$9.2 billion in the Florida economy in FY19/20 and FY20/21. This includes offsite spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The spending by resident and non-resident fishers was spread across a number of industries, including \$2.5 billion in the lodging industry, \$2.5 billion in retail, \$2.0 billion in spending in the food and beverage industry, \$1.2 billion in the recreation and entertainment industry, and \$1.1 billion in local transportation.



AMATEUR & LEISURE SPORTS FISHING

ECONOMIC IMPACTS OF FISHING

The \$9.2 billion spent by resident and non-resident fishers in FY19/20 and FY20/21 generated \$16.4 billion in total output, which includes indirect and induced impacts.

The fishing direct spending impact of \$9.2 billion generated a total economic impact of \$16.4 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$16.4 billion supported 81,200 full-time and part-time jobs on an annual basis and sustained \$1.4 billion in state and local taxes.



AMATEUR & LEISURE SPORTS
FISHING

Economic Impact Summary: Fishing

Millions of fishers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (millions of travelers)	6.8	6.9
Non-Resident	1.9	1.9
Resident	4.8	5.0
Sports economic footprint (\$ millions and jobs)		
Direct output	\$4,507	\$4,731
Total output	\$8,027	\$8,387
Total jobs	78,880	83,550
Total state & local taxes	\$662	\$692

Source: Tourism Economics
Note: sums may not total due to rounding





AMATEUR & LEISURE SPORTS WILDLIFE VIEWING

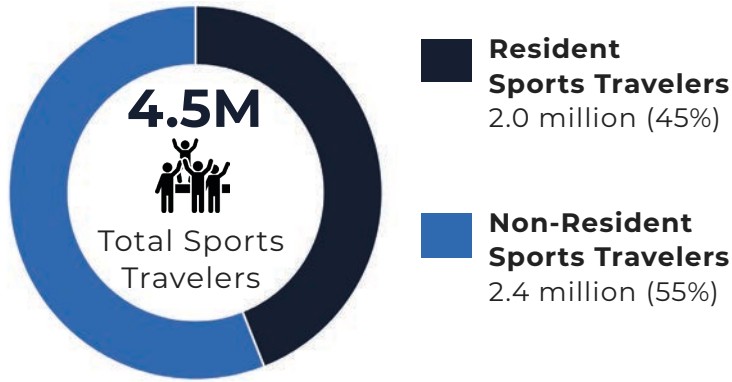
Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 4.5 million resident and non-resident sports travelers participated in wildlife viewing in Florida.

Florida’s climate and diverse array of natural resources provides a habitat for many types of wildlife for locals and visitors to admire. Visitors that traveled to Florida or within Florida to view wildlife spent money on lodging, food and beverage, retail, entertainment, and transportation.

In FY19/20 and FY20/21, 4.5 million resident and non-resident sports travelers participated in wildlife viewing in Florida – 2.4 million or 55% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for wildlife viewing.

Sports Travelers by Type: Wildlife Viewing
Number of travelers and percentage share



Source: National Park Service, Outdoor Foundation, Florida Sports Foundation

AMATEUR & LEISURE SPORTS WILDLIFE VIEWING

Non-Resident Sports Traveler Spending

Non-resident wildlife viewers spent \$4.1 billion across a wide range of sectors in Florida in FY19/20 and FY20/21.

The 2.4 million non-resident wildlife viewers spent \$4.1 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/ entertainment venues.

The off-site spending by non-resident wildlife viewers was spread across a number of industries, including \$1.1 billion in spending in the food and beverage industry, \$1.0 billion in the lodging industry, \$758.6 million in the recreation and entertainment industry, \$649.0 million in retail, and \$534.6 million in local transportation.



\$4.1 BILLION

**Wildlife Viewing:
Non-Resident Sports Traveler
Spending**



\$1.1B FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$1.0B LODGING

Hotels, motels, private home rentals, RVs



\$0.8B RECREATION

Amusements, theaters, entertainment, and other recreation



\$0.6B RETAIL

Souvenirs, general merchandise, malls, local retailers



\$0.5B LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

AMATEUR & LEISURE SPORTS

WILDLIFE VIEWING

Sports Economic Footprint

Resident and non-resident wildlife viewers spent \$7.0 billion across a wide range of sectors in FY19/20 and FY20/21.

The 4.5 million resident and non-resident wildlife viewers spent \$7.0 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The spending by resident and non-resident wildlife viewers was spread across a number of industries, including \$1.9 billion in spending in the food and beverage industry, \$1.8 billion in the lodging industry, \$1.3 billion in the recreation and entertainment industry, \$1.1 billion in retail, and \$904.8 million in local transportation.



AMATEUR & LEISURE SPORTS

WILDLIFE VIEWING

ECONOMIC IMPACTS OF WILDLIFE VIEWING

The \$7.0 billion spent by resident and non-resident wildlife viewers in FY19/20 and FY20/21 generated \$12.9 billion in total output, which includes indirect and induced impacts.

The wildlife viewing direct spending impact of \$7.0 billion generated a total economic impact of \$12.9 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$12.9 billion supported 67,000 full-time and part-time jobs on an annual basis and sustained \$1.0 billion in state and local taxes.



AMATEUR & LEISURE SPORTS
WILDLIFE VIEWING

Economic Impact Summary: Wildlife Viewing

Thousands of wildlife viewers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (thousands of travelers)	2,204.2	2,258.9
Non-Resident	1,224.9	1,224.8
Resident	979.3	1,034.0
Sports economic footprint (\$ millions and jobs)		
Direct output	\$3,453	\$3,563
Total output	\$6,357	\$6,528
Total jobs	65,680	68,410
Total state & local taxes	\$517	\$531

Source: Tourism Economics
Note: sums may not total due to rounding



AMATEUR & LEISURE SPORTS PARKS AND RECREATION

ECONOMIC IMPACTS OF PARKS AND RECREATION

In FY19/20 and FY20/21, local municipal and county governments spent \$5.9 billion on parks and recreation related expenditure.

The local municipal and county government direct spending impact of \$5.9 billion generated a total economic impact of \$14.1 billion in the Florida economy in FY19/20 and FY20/21.

This total output of \$14.1 billion supported 119,800 full-time and part-time jobs and sustained \$1.6 billion in state and local taxes.



\$14.1B

Total
Economic
Impact



119,800

Average Annualized
Statewide
Jobs



\$1.6B

Total
State & Local
Tax Revenues

AMATEUR & LEISURE SPORTS PARKS AND RECREATION

Economic Impact Summary: Parks and Recreation

\$ millions and jobs

	FY19/20	FY20/21
Sports economic footprint (\$ millions and jobs)		
Direct output	\$2,866	\$3,052
Total output	\$6,865	\$7,268
Total jobs	115,540	124,060
Total state & local taxes	\$760	\$805

Source: Tourism Economics

PROFESSIONAL SPORTS



PROFESSIONAL SPORTS

The professional sports component of the Florida sports economy generated \$10.2 billion in total output.

The professional sports segment of the Florida sports economy is composed of the following five sub-segments:

- Major league sports
- Spring training
- Minor league sports
- Motorsports
- Tennis

DETAILED ECONOMIC IMPACTS: PROFESSIONAL SPORTS

\$ millions and jobs

	Output		Jobs		State & Local Taxes	
	Direct	Total	Direct	Total	Direct	Total
Sports Economic Footprint	\$4,748	\$10,198	54,100	74,200	\$647	\$1,005
Major league sports	\$3,249	\$7,204	40,100	55,100	\$477	\$738
Spring training	\$339	\$680	3,200	4,300	\$40	\$62
Minor league sports	\$350	\$691	3,200	4,300	\$37	\$59
Motorsports	\$769	\$1,536	7,200	9,800	\$87	\$138
Tennis	\$41	\$86	400	600	\$5	\$8

Source: Tourism Economics
Note: sums may not total due to rounding

SUMMARY ECONOMIC IMPACTS: PROFESSIONAL SPORTS

In FY19/20 and FY20/21, professional sports had a direct sports economic footprint of \$4.7 billion, including off-site spending by resident and non-resident visitors and local operational spending. This spending generated a total statewide economic impact of \$10.2 billion and supported 74,200 total jobs on an annual basis in Florida. The total economic impact of \$10.2 billion generated approximately \$1.0 billion in total state and local tax revenues.



\$4.7B

Direct Sports
Economic
Footprint



\$10.2B

Total
Economic
Impact



74,200

Average
Annualized Jobs
Generated



\$1.0B

Total
State & Local
Tax Revenues



PROFESSIONAL SPORTS MAJOR LEAGUE SPORTS

Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 3.4 million resident and non-resident sports travelers attended a major league sporting event in Florida.

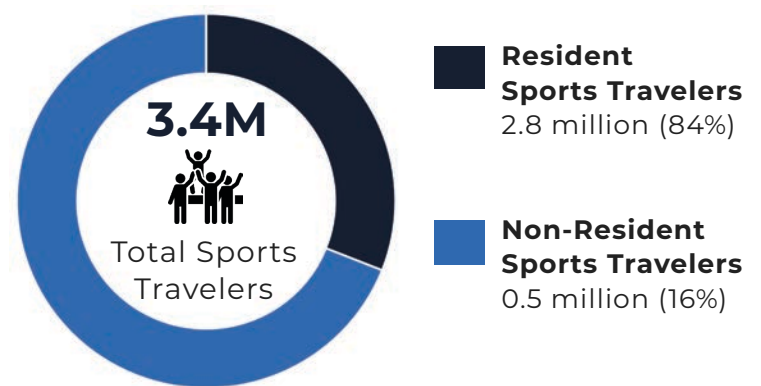
Florida is home to the following 12 major league teams:

- Florida Panthers
- Inter Miami CF
- Jacksonville Jaguars
- Miami Dolphins
- Miami Heat
- Miami Marlins
- Orlando City SC
- Orlando Magic
- Orlando Pride
- Tampa Bay Buccaneers
- Tampa Bay Lightning
- Tampa Bay Rays

Each of these teams generated significant economic impacts as they spent money in the local economy to sustain operations of the team. In addition, resident and non-resident sports travelers that attended a major league game spent money while attending games and frequenting off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation/entertainment venues.

In FY19/20 and FY20/21, 3.4 million resident and non-resident sports travelers attended a major league game – 547,000 or 16% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for the major league sports.

Sports Travelers by Type: Major League Sports
Number of travelers and percentage share



Source: major league teams, Florida Sports Foundation, Visit Florida

PROFESSIONAL SPORTS MAJOR LEAGUE SPORTS

Non-Resident Sports Traveler Spending

Non-resident sports travelers that attended a major league game in Florida spent \$241.3 million across a wide range of sectors in FY19/20 and FY20/21.

The 547,000 non-resident sports travelers spent \$241.3 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The off-site spending by non-resident sports travelers that attended a major league game was spread across a number of industries, including \$63.9 million in the lodging industry, \$53.9 million in the recreation and entertainment industry, \$49.4 million in spending in the food and beverage industry, \$42.2 million in retail, and \$31.9 million in local transportation.



\$241.3 MILLION

Major League Sports:
Non-Resident Sports Traveler
Spending



\$63.9M LODGING

Hotels, motels, private home rentals, RVs



\$53.9M RECREATION

Amusements, theaters, entertainment, and other recreation



\$49.4M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$42.2M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$31.9M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

PROFESSIONAL SPORTS MAJOR LEAGUE SPORTS

Sports Economic Footprint

Resident and non-resident sports travelers and major league teams across Florida spent \$3.2 billion across a wide range of sectors in FY19/20 and FY20/21.

The 3.4 million resident and non-resident sports travelers and major league teams spent \$3.2 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at sports facilities during the major league games.

The spending by resident and non-resident sports travelers and major league teams was spread across a number of industries, including \$2.2 billion in operational spending, \$245 million in the recreation and entertainment industry, \$226 million in spending in the food and beverage industry, \$203 million in the lodging industry, \$192 million in retail, and \$146 million in local transportation.



\$3.25 BILLION

Major League Sports:
Sports Economic Footprint



\$2.24B OPERATIONS

Payroll, marketing, legal, professional services, other operational expenses



\$0.25B RECREATION

Amusements, theaters, entertainment, and other recreation



\$0.23B FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$0.20B LODGING

Hotels, motels, private home rentals, RVs



\$0.19B RETAIL

Souvenirs, general merchandise, malls, local retailers



\$0.15B LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

PROFESSIONAL SPORTS MAJOR LEAGUE SPORTS

ECONOMIC IMPACTS OF MAJOR LEAGUE SPORTS

The \$3.2 billion spent by resident and non-resident sports travelers and major league teams in FY19/20 and FY20/21 generated \$7.2 billion in total output, which includes indirect and induced impacts.

The resident and non-resident sports traveler and major league team direct spending impact of \$3.2 billion, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$7.2 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$7.2 billion supported 55,100 full-time and part-time jobs on an annual basis and sustained \$738 million in state and local taxes.



\$7.2B

Total
Economic
Impact



55,100

Average Annualized
Statewide
Jobs



\$0.7B

Total
State & Local
Tax Revenues

PROFESSIONAL SPORTS

MAJOR LEAGUE SPORTS

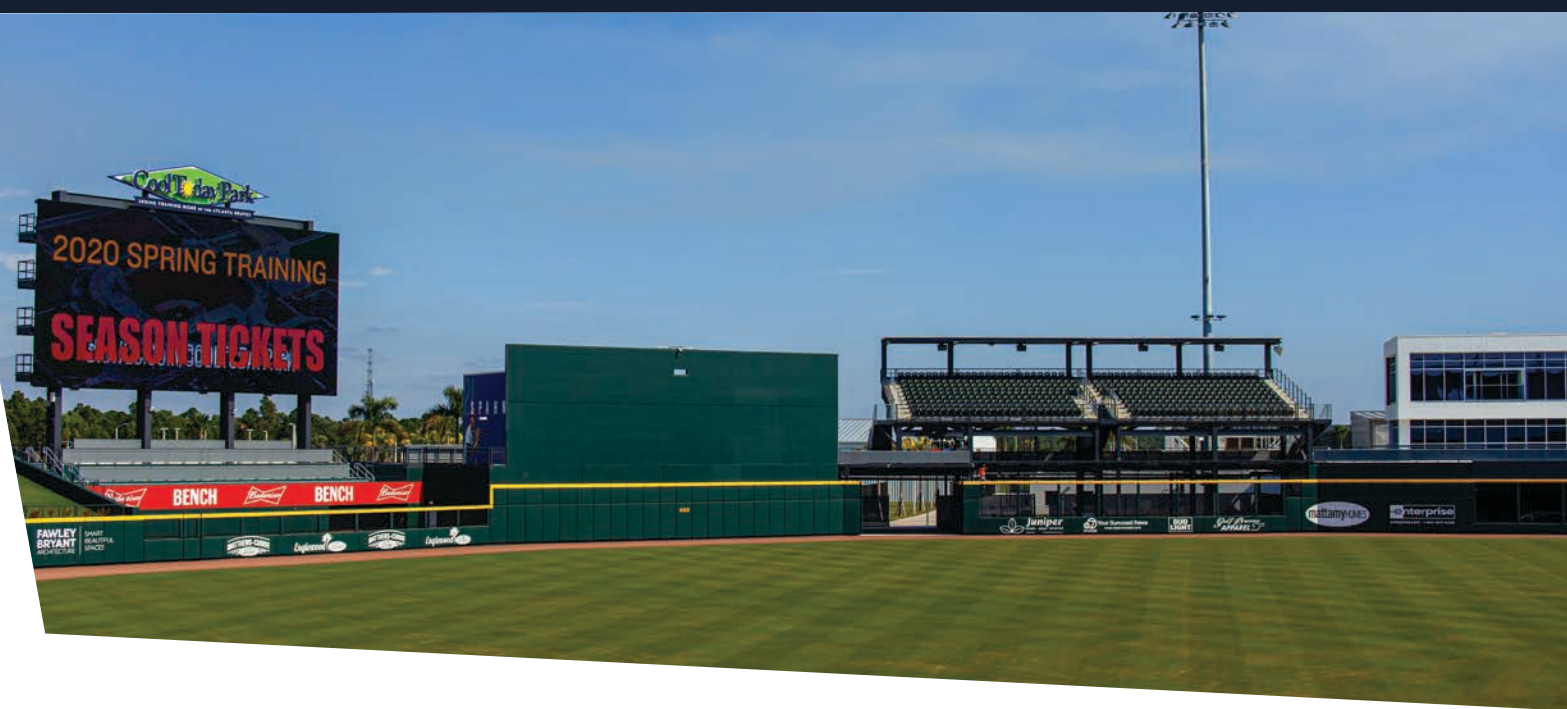
Economic Impact Summary: Major League Sports

Millions of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (millions of travelers)		
Non-Resident	2.6	0.7
Resident	0.4	0.1
	2.2	0.6
Sports economic footprint (\$ millions and jobs)		
Direct output	\$1,922	\$1,327
Total output	\$4,169	\$3,035
Total jobs	61,120	49,150
Total state & local taxes	\$415	\$323

Source: Tourism Economics
Note: sums may not total due to rounding





PROFESSIONAL SPORTS SPRING TRAINING

Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 351,000 resident and non-resident sports travelers attended Spring Training in Florida.

Florida hosts 15 MLB teams each February and March for Spring Training, known as the Grapefruit League. The teams are located throughout Florida, primarily along the Gulf Coast, Treasure Coast, and Tampa Bay area.

Each of these MLB teams generated significant economic impacts as they spent money in the local economy to sustain operations of the team and Spring Training complex. In addition, resident and non-resident sports travelers that attended Spring Training spent money while at the game and frequenting off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation/entertainment venues.

In FY19/20 and FY20/21, 351,000 unique resident and non-resident sports travelers attended at least one Spring Training game – 225,000 or 64% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for Spring Training.

Sports Travelers by Type: Spring Training
Number of travelers and percentage share



Source: MLB , Florida Sports Foundation

PROFESSIONAL SPORTS SPRING TRAINING

Non-Resident Sports Traveler Spending

Non-resident sports travelers that attended Spring Training in Florida spent \$190.4 million across a wide range of sectors in FY19/20 and FY20/21.

The 225,000 non-resident sports travelers that attended Spring Training spent \$190.4 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/ entertainment venues.

The off-site spending by non-resident sports travelers that attended Spring Training was spread across a number of industries, including \$52.2 million in spending in the food and beverage industry, \$47.3 million in the lodging industry, \$35.5 million in the recreation and entertainment industry, \$30.4 million in retail, and \$25.0 million in local transportation.



\$190.4 MILLION

**Spring Training:
Non-Resident Sports Traveler
Spending**



\$52.2M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$47.3M LODGING

Hotels, motels, private home rentals, RVs



\$35.5M RECREATION

Amusements, theaters, entertainment, and other recreation



\$30.4M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$25.0M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

PROFESSIONAL SPORTS SPRING TRAINING

Sports Economic Footprint

Resident and non-resident sports travelers and Grapefruit League teams across Florida spent \$338.7 million across a wide range of sectors in FY19/20 and FY20/21.

The 351,000 resident and non-resident sports travelers and Grapefruit League teams spent \$338.7 million in the Florida economy in FY19/20 and FY20/21. This includes offsite spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at Spring Training complexes.

The spending by resident and nonresident sports travelers and Grapefruit League teams was spread across a number of industries, including \$103.2 million in operational spending, \$64.2 million in spending in the food and beverage industry, \$59.4 million in the lodging industry, \$43.7 million in the recreation and entertainment industry, \$37.4 million in retail, and \$30.8 million in local transportation.



PROFESSIONAL SPORTS SPRING TRAINING

ECONOMIC IMPACTS OF SPRING TRAINING

The \$338.7 million spent by resident and non-resident sports travelers and Grapefruit League teams in FY19/20 and FY20/21 generated \$679.8 million in total output, which includes indirect and induced impacts.

The resident and non-resident sports traveler and Grapefruit League teams direct spending impact of \$338.7 million, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$679.8 million in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$679.8 million supported 4,300 full-time and part-time jobs on an annual basis and sustained \$62.2 million in state and local taxes.



PROFESSIONAL SPORTS

SPRING TRAINING

Economic Impact Summary: Spring Training

Thousands of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (thousands of travelers)	257.1	94.1
Non-Resident	166.3	58.4
Resident	90.8	35.7
Sports economic footprint (\$ millions and jobs)		
Direct output	\$226	\$113
Total output	\$445	\$234
Total jobs	5,440	3,240
Total state & local taxes	\$40	\$22

Source: Tourism Economics
Note: sums may not total due to rounding





PROFESSIONAL SPORTS MINOR LEAGUE SPORTS

Resident & Non-Resident Sports Travelers

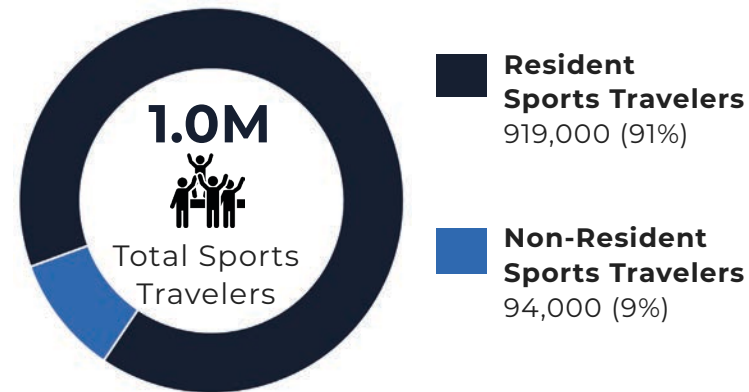
In FY19/20 and FY20/21, 1.0 million resident and non-resident sports travelers attended a minor league sporting event in Florida

During the three fiscal years analyzed, Florida was home to a myriad of minor league teams – the majority of which were associated with baseball. The minor league teams played in the following leagues (some of which have since changed names or folded): Arena Football League, East Coast Hockey League, Florida State League, National Arena League, NBA G League, Southern League, and United Soccer League.

Each of these minor league teams generated significant economic impacts as they spent money in the local economy to sustain operations. In addition, resident and non-resident sports travelers that attended a minor league game spent money while attending games and frequenting off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation/entertainment venues.

In FY19/20 and FY20/21, 1.0 million resident and non-resident sports travelers attended a minor league game – 94,000 or 9% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for the minor league sports.

Sports Travelers by Type: Minor League Sports
Number of travelers and percentage share



Source: minor league teams, Florida Sports Foundation, Visit Florida

PROFESSIONAL SPORTS MINOR LEAGUE SPORTS

Non-Resident Sports Traveler Spending

Non-resident sports travelers that attended a minor league game in Florida spent \$57.4 million across a wide range of sectors in FY19/20 and FY20/21.

The 94,000 non-resident sports travelers spent \$57.4 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The off-site spending by non-resident sports travelers that attended a minor league game was spread across a number of industries, including \$17.6 million in the lodging industry, \$14.5 million in spending in the food and beverage industry, \$9.9 million in the recreation and entertainment industry, \$8.5 million in retail, and \$7.0 million in local transportation.



\$57.4 MILLION

**Minor League Sports:
Non-Resident Sports Traveler
Spending**



\$17.6M LODGING

Hotels, motels, private home rentals, RVs



\$14.5M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$9.9M RECREATION

Amusements, theaters, entertainment, and other recreation



\$8.5M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$7.0M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

PROFESSIONAL SPORTS MINOR LEAGUE SPORTS

Sports Economic Footprint

Resident and non-resident sports travelers and minor league teams across Florida spent \$349.9 million across a wide range of sectors in FY19/20 and FY20/21.

The 1.0 million resident and non-resident sports travelers and minor league teams spent \$349.9 million in the Florida economy in FY19/20 and FY20/21. This includes offsite spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at sports facilities during the minor league games.

The spending by resident and nonresident sports travelers and minor league teams was spread across a number of industries, including \$82.3 million in operational spending, \$80.1 million in spending in the food and beverage industry, \$54.5 million in the recreation and entertainment industry, \$48.1 million in the lodging industry, \$46.6 million in retail, and \$38.4 million in local transportation.



\$349.9 MILLION

Minor League Sports:
Sports Economic Footprint



\$82.3M OPERATIONS

Payroll, marketing, legal, professional services, other operational expenses



\$80.1M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$54.5M RECREATION

Amusements, theaters, entertainment, and other recreation



\$48.1M LODGING

Hotels, motels, private home rentals, RVs



\$46.6M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$38.4M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

PROFESSIONAL SPORTS MINOR LEAGUE SPORTS

ECONOMIC IMPACTS OF MINOR LEAGUE SPORTS

The \$349.9 million spent by resident and non-resident sports travelers and minor league teams in FY19/20 and FY20/21 generated \$690.9 million in total output, which includes indirect and induced impacts.

The resident and non-resident sports traveler and minor league team direct spending impact of \$349.9 million, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$690.9 million in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$690.9 million supported 4,300 full-time and part-time jobs on an annual basis and sustained \$58.9 million in state and local taxes.



\$690.9M

Total
Economic
Impact



4,300

Average Annualized
Statewide
Jobs



\$58.9M

Total
State & Local
Tax Revenues

PROFESSIONAL SPORTS
MINOR LEAGUE SPORTS

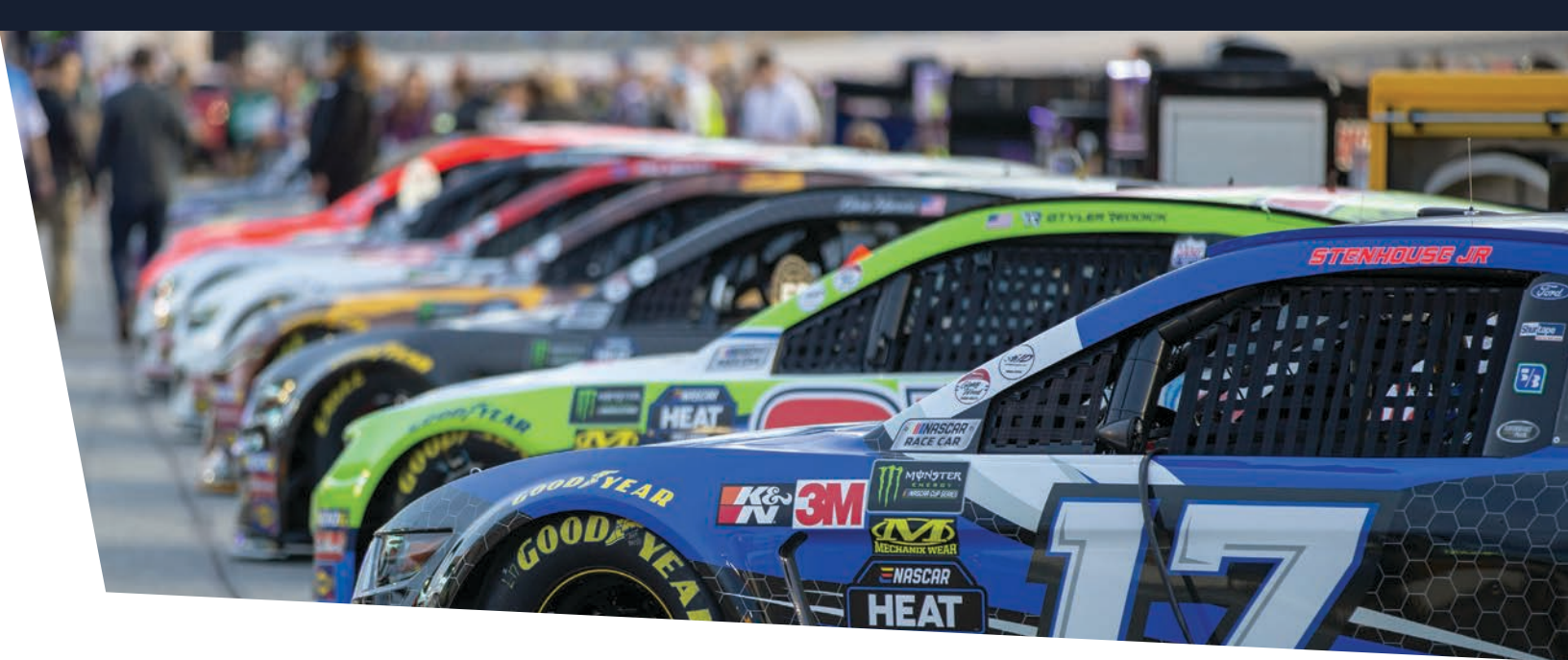
Economic Impact Summary: Minor League Sports

Thousands of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (thousands of travelers)	646.0	366.7
Non-Resident	60.4	33.7
Resident	585.6	333.0
Sports economic footprint (\$ millions and jobs)		
Direct output	\$211	\$138
Total output	\$414	\$277
Total jobs	5,020	3,580
Total state & local taxes	\$35	\$24

Source: Tourism Economics
Note: sums may not total due to rounding





PROFESSIONAL SPORTS MOTORSPORTS

Resident & Non-Resident Sports Travelers

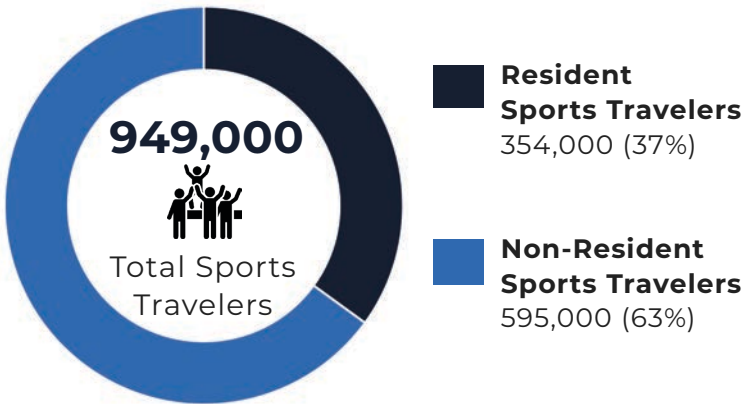
In FY19/20 and FY20/21, 949,000 resident and non-resident sports travelers attended a NASCAR race in Florida or the Firestone Grand Prix of St. Petersburg.

Florida is home to two major NASCAR tracks (Daytona International Speedway and Homestead-Miami Speedway) and the Firestone Grand Prix of St. Petersburg, an IndyCar Series race.

Each of these venues and events generated significant economic impacts as they spent money in the local economy to sustain operations. In addition, resident and non-resident sports travelers that attended a motorsports race spent money while at the race and frequenting off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation/entertainment venues.

In FY19/20 and FY20/21, 949,000 resident and non-resident sports travelers attended a race – 595,000 or 63% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for motorsports.

Sports Travelers by Type: Motorsports
Number of travelers and percentage share



Source: SBRNET, Florida Sports Foundation

PROFESSIONAL SPORTS MOTORSPORTS

Non-Resident Sports Traveler Spending

Non-resident sports travelers that attended motorsports race in Florida spent \$463.5 million across a wide range of sectors in FY19/20 and FY20/21.

The 595,000 non-resident sports travelers spent \$463.5 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The off-site spending by non-resident sports travelers that attended a motorsports race was spread across a number of industries, including \$127.9 million in spending in the food and beverage industry, \$112.7 million in the lodging industry, \$87.0 million in the recreation and entertainment industry, \$74.5 million in retail, and \$61.3 million in local transportation.



\$463.5 MILLION

**Motorsports:
Non-Resident Sports Traveler
Spending**



\$127.9M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$112.7M LODGING

Hotels, motels, private home rentals, RVs



\$87.0M RECREATION

Amusements, theaters, entertainment, and other recreation



\$74.5M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$61.3M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

PROFESSIONAL SPORTS MOTORSPORTS

Sports Economic Footprint

Resident and non-resident sports travelers and motorsport venues and events across Florida spent \$769.0 million across a wide range of sectors in FY19/20 and FY20/21.

The 949,000 resident and non-resident sports travelers and motorsport venues and events spent \$769.0 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at motorsport races.

The spending by resident and nonresident sports travelers and motorsport venues and events was spread across a number of industries, including \$221.5 million in operational spending, \$153.8 million in spending in the food and beverage industry, \$125.7 million in the lodging industry, \$104.7 million in the recreation and entertainment industry, \$89.6 million in retail, and \$73.8 million in local transportation.



PROFESSIONAL SPORTS MOTORSPORTS

ECONOMIC IMPACTS OF MOTORSPORTS

The \$769.0 million spent by resident and non-resident sports travelers and motorsports venues and events in FY19/20 and FY20/21 generated \$1.5 billion in total output, which includes indirect and induced impacts.

The resident and non-resident sports traveler and motorsports venues and events direct spending impact of \$769.0 million, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$1.5 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$1.5 billion supported 9,800 full-time and part-time jobs on an annual basis and sustained \$138.0 million in state and local taxes.



PROFESSIONAL SPORTS
MOTORSPORTS

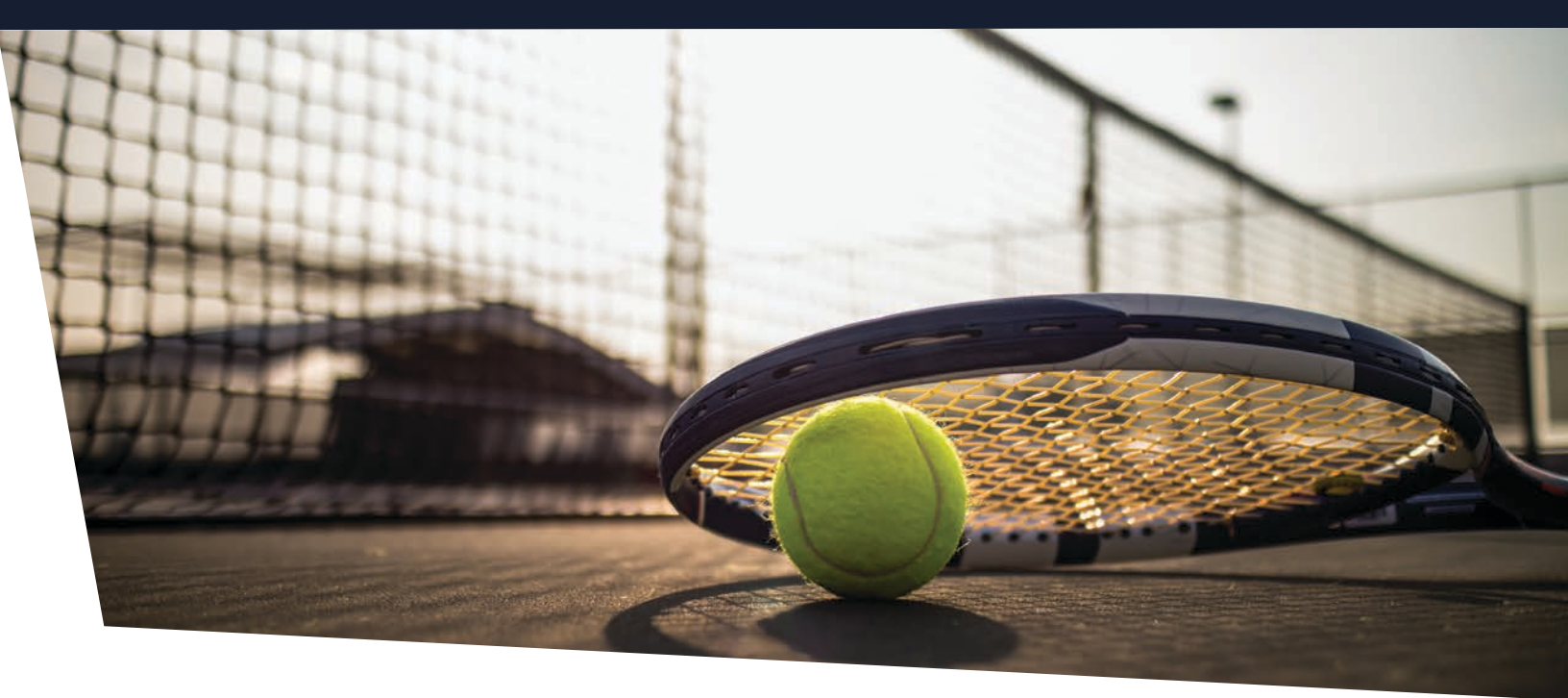
Economic Impact Summary: Motorsports

Thousands of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (thousands of travelers)	387.7	561.4
Non-Resident	242.8	352.4
Resident	144.9	209.0
Sports economic footprint (\$ millions and jobs)		
Direct output	\$323	\$446
Total output	\$653	\$883
Total jobs	8,390	11,180
Total state & local taxes	\$59	\$79

Source: Tourism Economics
Note: sums may not total due to rounding





PROFESSIONAL SPORTS TENNIS

Resident & Non-Resident Sports Travelers

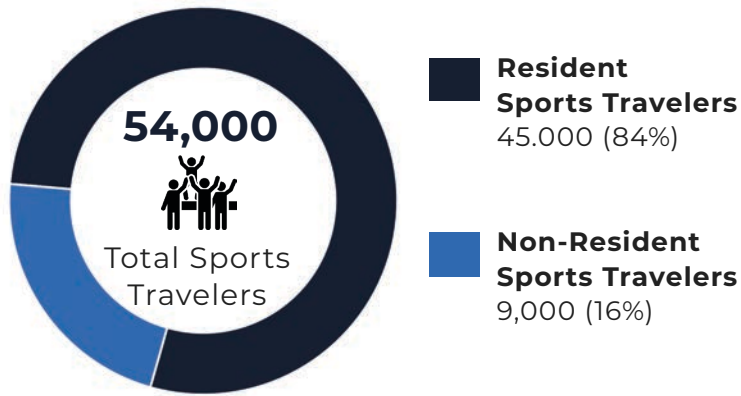
In FY19/20 and FY20/21, 54,000 resident and non-resident sports travelers attended the Delray Beach Open and the Miami Open.

Florida is home to two ATP and WTA tournaments each year: the Delray Beach Open and the Miami Open.

Each of these tournaments generated significant economic impacts as the tournament operators spent money in the local economy to sustain tournament operations. In addition, resident and non-resident sports travelers that attended a tennis tournament spent money while at the tournament and frequenting off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation/entertainment venues.

In FY19/20 and FY20/21, 54,000 resident and non-resident sports travelers attended a professional tennis tournament – 9,000 or 16% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for professional tennis.

Sports Travelers by Type: Tennis
Number of travelers and percentage share



Source: Miami Open, Florida Sports Foundation

PROFESSIONAL SPORTS TENNIS

Non-Resident Sports Traveler Spending

Non-resident sports travelers that attended the Delray Beach Open and the Miami Open spent \$6.0 million across a wide range of sectors in FY19/20 and FY20/21.

The 9,000 non-resident sports travelers spent \$6.0 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/ entertainment venues.

The off-site spending by non-resident sports travelers that attended a tennis tournament was spread across a number of industries, including \$1.6 million in spending in the food and beverage industry, \$1.5 million in the lodging industry, \$1.1 million in the recreation and entertainment industry, \$942,000 in retail, and \$776,000 in local transportation.



PROFESSIONAL SPORTS TENNIS

Sports Economic Footprint

Resident and non-resident sports travelers and professional tennis tournament operators spent \$40.9 million across a wide range of sectors in FY19/20 and FY20/21.

The 54,000 resident and non-resident sports travelers and professional tennis tournament operators spent \$40.9 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at the Delray Beach Open and Miami Open.

The spending by resident and non-resident sports travelers and professional tennis tournaments was spread across a number of industries, including \$20.0 million in operational spending, \$6.0 million in spending in the food and beverage industry, \$4.3 million in the lodging industry, \$4.1 million in the recreation and entertainment industry, \$3.5 million in retail, and \$2.9 million in local transportation.



PROFESSIONAL SPORTS TENNIS

ECONOMIC IMPACTS OF TENNIS

The \$40.9 million spent by resident and non-resident sports travelers and tennis tournament operators in FY19/20 and FY20/21 generated \$86.4 million in total output, which includes indirect and induced impacts.

The resident and non-resident sports traveler and tennis tournament operators direct spending impact of \$40.9 million, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$86.4 million in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$86.4 million supported 600 full-time and part-time jobs on an annual basis and sustained \$8.3 million in state and local taxes.



PROFESSIONAL SPORTS

TENNIS

Economic Impact Summary: Tennis

Thousands of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (thousands of travelers)	38.8	15.3
Non-Resident	6.2	2.4
Resident	32.6	12.9
Sports economic footprint (\$ millions and jobs)		
Direct output	\$24	\$17
Total output	\$48	\$38
Total jobs	640	580
Total state & local taxes	\$4	\$4

Source: Tourism Economics
Note: sums may not total due to rounding



COLLEGIATE ATHLETICS

COLLEGIATE ATHLETICS

The collegiate athletics component of the Florida sports economy generated \$5.5 billion in total output in FY19/20 and FY20/21.

The collegiate athletics segment of the Florida sports economy is composed of the following sub-segments:

- Collegiate sports
- Collegiate bowl games

DETAILED ECONOMIC IMPACTS: COLLEGIATE ATHLETICS

\$ millions and jobs

	Output		Jobs		State & Local Taxes	
	Direct	Total	Direct	Total	Direct	Total
Sports Economic Footprint	\$2,480	\$5,478	30,200	41,500	\$362	\$559
Collegiate sports	\$2,230	\$4,955	27,500	37,900	\$329	\$509
Collegiate bowl games	\$250	\$523	2,600	3,600	\$32	\$50

Source: Tourism Economics

Note: sums may not total due to rounding

SUMMARY ECONOMIC IMPACTS: COLLEGIATE ATHLETICS

In FY19/20 and FY20/21, collegiate athletics had a direct sports economic footprint of \$2.5 billion, including off-site spending by resident and non-resident visitors and local operational spending. This spending generated a total statewide economic impact of \$5.5 billion and supported 41,500 total jobs on an annual basis in Florida. The total economic impact of \$5.5 billion generated approximately \$559.4 million in total state and local tax revenues.



\$2.5B

Direct Sports
Economic
Footprint



\$5.5B

Total
Economic
Impact



41,500

Average
Annualized Jobs
Generated



\$559M

Total
State & Local
Tax Revenues



COLLEGIATE ATHLETICS COLLEGIATE SPORTS

Resident & Non-Resident Sports Travelers

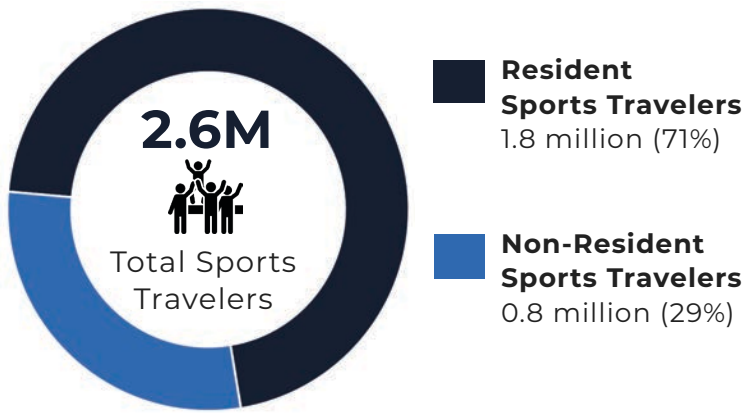
In FY19/20 and FY20/21, 2.6 million resident and non-resident sports travelers attended a collegiate sports game in Florida.

Florida is home to more than 60 public and private colleges and universities, all of which offer and fund collegiate athletic departments.

Each of these schools generated significant economic impacts as they spent money in the local economy to sustain operations of the athletic programs. In addition, resident and non-resident sports travelers that attended a collegiate athletic game spent money while attending games and frequenting off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation entertainment venues.

In FY19/20 and FY20/21, 2.6 million resident and non-resident sports travelers attended a collegiate sports game – 753,000 or 29% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for collegiate sports.

Sports Travelers by Type: Collegiate Sports
Number of travelers and percentage share



Source: Source: Knights Commission on Intercollegiate Athletics, colleges and universities, Florida Sports Foundation

COLLEGIATE ATHLETICS COLLEGIATE SPORTS

Non-Resident Sports Traveler Spending

Non-resident sports travelers that attended a collegiate sports game in Florida spent \$350.6 million across a wide range of sectors in FY19/20 and FY20/21.

The 753,000 non-resident sports travelers spent \$350.6 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The off-site spending by non-resident sports travelers that attended a collegiate sports game was spread across a number of industries, including \$97.5 million in spending in the food and beverage industry, \$83.2 million in the lodging industry, \$66.4 million in the recreation and entertainment industry, \$56.8 million in retail, and \$46.8 million in local transportation.



\$350.6 MILLION

**Collegiate Sports:
Non-Resident Sports Traveler
Spending**



\$97.5M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$83.2M LODGING

Hotels, motels, private home rentals, RVs



\$66.4M RECREATION

Amusements, theaters, entertainment, and other recreation



\$56.8M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$46.8M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

COLLEGIATE ATHLETICS

COLLEGIATE SPORTS

Sports Economic Footprint

Resident and non-resident sports travelers and collegiate athletic programs across Florida spent \$2.2 billion across a wide range of sectors in FY19/20 and FY20/21.

The 2.6 million resident and nonresident sports travelers and collegiate athletic departments spent \$2.2 billion in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at collegiate sports facilities during games.

The spending by resident and nonresident sports travelers and collegiate athletic departments was spread across a number of industries, including \$1.5 billion in operational spending, \$191 million in spending in the food and beverage industry, \$160 million in the lodging industry, \$130 million in the recreation and entertainment industry, \$111 million in retail, and \$91 million in local transportation.



COLLEGIATE ATHLETICS

COLLEGIATE SPORTS

ECONOMIC IMPACTS OF COLLEGIATE SPORTS

The \$2.2 billion spent by resident and non-resident sports travelers and collegiate athletic departments in FY19/20 and FY20/21 generated \$5.0 billion in total output, which includes indirect and induced impacts.

The resident and non-resident sports traveler and collegiate athletic department direct spending impact of \$2.2 billion, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$5.0 billion in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$5.0 billion supported 37,900 full-time and part-time jobs on an annual basis and sustained \$509 million in state and local taxes.



COLLEGIATE ATHLETICS
COLLEGIATE SPORTS

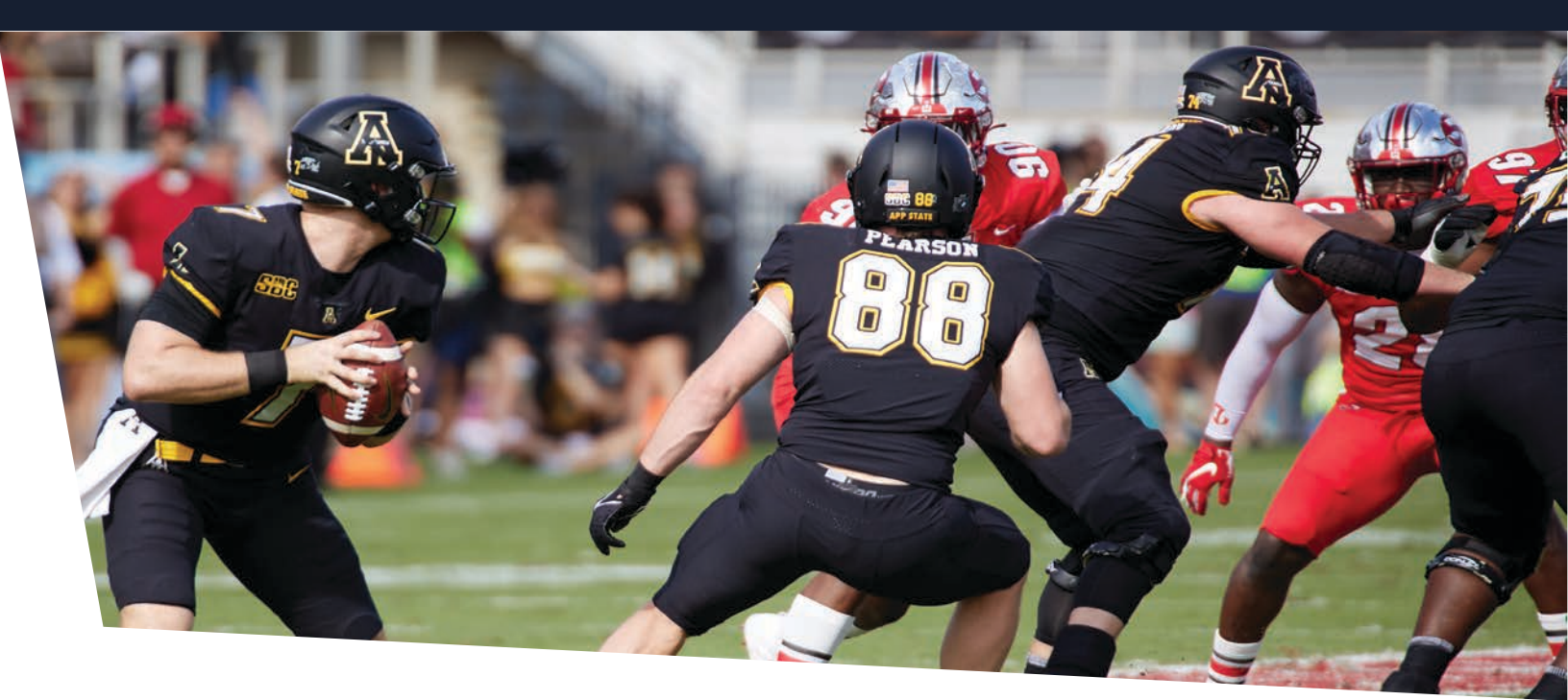
Economic Impact Summary: Collegiate Sports

Millions of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (millions of travelers)	2.3	0.3
Non-Resident	0.7	0.1
Resident	1.6	0.2
Sports economic footprint (\$ millions and jobs)		
Direct output	\$1,419	\$812
Total output	\$3,066	\$1,889
Total jobs	44,490	31,280
Total state & local taxes	\$305	\$204

Source: Tourism Economics
Note: sums may not total due to rounding



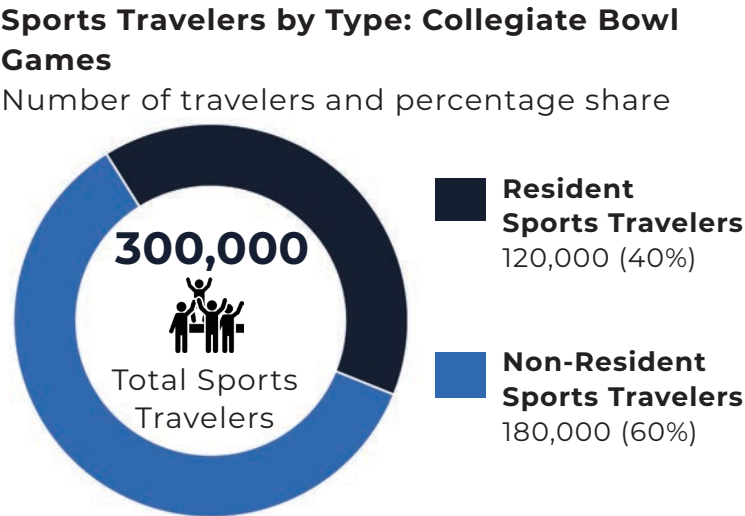


COLLEGIATE ATHLETICS COLLEGIATE BOWL GAMES

Resident & Non-Resident Sports Travelers

In FY19/20 and FY20/21, 300,000 resident and non-resident sports travelers attended a collegiate bowl game in Florida.

During the three fiscal years analyzed, Florida was home to the following eight annual collegiate bowl games (some of which changed title sponsors): Boca Raton Bowl, Cheez-It Bowl, Citrus Bowl, Cure Bowl, Gasparilla Bowl, Orange Bowl, Outback Bowl, and TaxSlayer Gator Bowl. Each of these bowl games generated significant economic impacts as the event operators spent money in the local economy to sustain operations of the games. In addition, resident and non-resident sports travelers that attended a bowl game spent money while attending the game and frequenting off-site establishments in the local economy, including local restaurants, hotels, retailers, and recreation/entertainment venues. In FY19/20 and FY20/21, 300,000 resident and non-resident sports travelers attended a bowl game – 180,000 or 60% of which originated from outside the State of Florida. These visitors generated incremental spending in the host market economies that would not have occurred but for the bowl games.



Source: bowl games, Florida Sports Foundation

COLLEGIATE ATHLETICS COLLEGIATE BOWL GAMES

Non-Resident Sports Traveler Spending

Non-resident sports travelers that attended a bowl game in Florida spent \$106.2 million across a wide range of sectors in FY19/20 and FY20/21.

The 180,000 non-resident sports travelers spent \$106.2 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues.

The off-site spending by non-resident sports travelers that attended a bowl game was spread across a number of industries, including \$28.8 million in spending in the food and beverage industry, \$27.1 million in the lodging industry, \$19.6 million in the recreation and entertainment industry, \$16.8 million in retail, and \$13.8 million in local transportation.



\$106.2 MILLION

**Collegiate Bowl Games:
Non-Resident Sports Traveler
Spending**



\$28.8M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$27.1M LODGING

Hotels, motels, private home rentals, RVs



\$19.6M RECREATION

Amusements, theaters, entertainment, and other recreation



\$16.8M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$13.8M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

COLLEGIATE ATHLETICS

COLLEGIATE BOWL GAMES

Sports Economic Footprint

Resident and non-resident sports travelers and bowl game operators across Florida spent \$250.3 million across a wide range of sectors in FY19/20 and FY20/21.

The 300,000 resident and nonresident sports travelers and bowl game operators spent \$250.3 million in the Florida economy in FY19/20 and FY20/21. This includes off-site spending at local restaurants, hotels, retailers, and recreation/entertainment venues, as well as on-site spending at sports facilities during the bowl games.

The spending by resident and nonresident sports travelers and bowl game operators was spread across a number of industries, including \$113.5 million in operational spending, \$37.1 million in spending in the food and beverage industry, \$35.1 million in the lodging industry, \$25.2 million in the recreation and entertainment industry, \$21.6 million in retail, and \$17.8 million in local transportation.



\$250.3 MILLION

Collegiate Bowl Games: Sports Economic Footprint



\$113.5M OPERATIONS

Payroll, marketing, legal, professional services, other operational expenses



\$37.1M FOOD & BEVERAGE

Full-service restaurants, fast food, convenience stores,



\$35.1M LODGING

Hotels, motels, private home rentals, RVs



\$25.2M RECREATION

Amusements, theaters, entertainment, and other recreation



\$21.6M RETAIL

Souvenirs, general merchandise, malls, local retailers



\$17.8M LOCAL TRANSPORTATION

Taxis, buses, parking, public transportation, ride share

COLLEGIATE ATHLETICS

COLLEGIATE BOWL GAMES

ECONOMIC IMPACTS OF COLLEGIATE BOWL GAMES

The \$250.3 million spent by resident and non-resident sports travelers and bowl game operators in FY19/20 and FY20/21 generated \$522.8 million in total output, which includes indirect and induced impacts.

The resident and non-resident sports traveler and bowl game operator direct spending impact of \$250.3 million, which includes operational spending and spending by resident and non-resident sports travelers, generated a total economic impact of \$522.8 million in the Florida economy in FY19/20 and FY20/21.

This total economic impact of \$522.8 million supported 3,600 full-time and part-time jobs on an annual basis and sustained \$50.4 million in state and local taxes.



\$522.8M

Total Economic Impact



3,600

Average Annualized Statewide Jobs



\$50.4M

Total State & Local Tax Revenues

COLLEGIATE ATHLETICS
COLLEGIATE BOWL GAMES

Economic Impact Summary: Collegiate Bowl Games

Thousands of sports travelers, \$ millions, and jobs

	FY19/20	FY20/21
Sports travelers (thousands of travelers)	248.4	51.6
Non-Resident	149.2	31.0
Resident	99.2	20.6
Sports economic footprint (\$ millions and jobs)		
Direct output	\$169	\$81
Total output	\$344	\$179
Total jobs	4,440	2,770
Total state & local taxes	\$32	\$19

Source: Tourism Economics
Note: sums may not total due to rounding



EQUINE INDUSTRY

EQUINE INDUSTRY

The equine industry generated a total economic impact of \$6.1 billion in FY19/20 and FY20/21.

Florida’s equine industry is widely recognized by national and international experts as among the worlds finest.

The equine industry generated significant impacts as horse owners, breeders, thoroughbred auctions, and show operators spent money in the local economy to care for the horses and sustain daily operations. In addition, resident and non-resident visitors participating in the equine industry spent money in the local economy, including local restaurants, hotels, retailers, and recreation/entertainment venues.

In FY19/20 and FY20/21, horse owners, breeders, thoroughbred auctions, show operators, and equine visitors spent \$2.5 billion in Florida, which generated a total economic impact of \$6.1 billion, supported 51,500 full-time and part-time jobs on an annual basis, and sustained \$673 million in state and local taxes.

DETAILED ECONOMIC IMPACTS: EQUINE INDUSTRY

\$ millions and jobs

	FY19/20	FY20/21
Sports economic footprint (\$ millions and jobs)		
Direct output	\$1,172	\$1,372
Total output	\$2,807	\$3,268
Total jobs	47,250	55,790
Total state & local taxes	\$311	\$362

Source: Tourism Economics

Note: sums may not total due to rounding

SUMMARY ECONOMIC IMPACTS: EQUINE INDUSTRY

In FY19/20 and FY20/21, the equine industry had a direct sports economic footprint of \$2.5 billion. This spending generated a total statewide economic impact of \$6.1 billion and supported 51,500 total jobs on an annual basis in Florida. The total economic impact of \$6.1 billion generated approximately \$672.8 million in total state and local tax revenues.



\$2.5B

Direct Sports
Economic
Footprint



\$6.1B

Total
Economic
Impact



51,500

Average
Annualized
Statewide Jobs



\$672.8M

Total
State & Local
Tax Revenues

RETAIL SALES

RETAIL SALES

The sports retail industry generated a total economic impact of \$11.2 billion in FY19/20 and FY20/21.

The sports retail industry generated significant economic impacts in the State of Florida as resident and non-resident visitors spent substantial amounts of money on sports clothing, footwear, and equipment.

In FY19/20 and FY20/21, the \$4.7 billion in retail sales generated \$11.2 billion in total output, supported 94,700 full-time and part-time jobs on an annual basis, and sustained \$1.2 billion in state and local taxes.

DETAILED ECONOMIC IMPACTS: RETAIL SALES

\$ millions and jobs

	FY19/20	FY20/21
Sports economic footprint (\$ millions and jobs)		
Direct output	\$2,267	\$2,408
Total output	\$5,431	\$5,736
Total jobs	91,420	97,910
Total state & local taxes	\$601	\$635

Source: Tourism Economics
Note: sums may not total due to rounding

SUMMARY ECONOMIC IMPACTS: RETAIL SALES

In FY19/20 and FY20/21, the sports retail industry had a direct sports economic footprint of \$4.7 billion. This spending generated a total statewide economic impact of \$11.2 billion and supported 94,700 total jobs on an annual basis in Florida. The total economic impact of \$11.2 billion generated approximately \$1.2 billion in total state and local tax revenues.



\$4.7B

Direct Sports
Economic
Footprint



\$11.2B

Total
Economic
Impact



94,700

Average
Annualized
Jobs



\$610M

Total
State & Local
Tax Revenues

ABOUT THE RESEARCH TEAM



Oxford Economics was founded in 1981 as a commercial venture with Oxford University’s business college to provide economic forecasting and modelling to UK companies and financial institutions expanding abroad. Since then, we have become one of the world’s foremost independent global advisory firms, providing reports, forecasts and analytical tools on 200 countries, 100 industrial sectors and over 3,000 cities. Our best-of-class global economic and industry models and analytical tools give us an unparalleled ability to forecast external market trends and assess their economic, social and business impact.

Oxford Economics is an adviser to corporate, financial and government decision-makers and thought leaders. Our worldwide client base comprises over 2,000 international organizations, including leading multinational companies and financial institutions; key government bodies and trade associations; and top universities, consultancies, and think tanks.

This study was conducted by the Tourism Economics group within Oxford Economics. Tourism Economics combines an understanding of traveler dynamics with rigorous economics in order to answer the most important questions facing destinations, investors, and strategic planners. By combining quantitative methods with industry knowledge, Tourism Economics designs custom market strategies, destination recovery plans, forecasting models, policy analysis, and economic impact studies.

Oxford Economics employs 400 full-time staff, including 250 professional economists and analysts. Headquartered in Oxford, England, with regional centers in London, New York, and Singapore, Oxford Economics has offices across the globe in Belfast, Chicago, Dubai, Miami, Milan, Paris, Philadelphia, San Francisco, and Washington DC.





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