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## **Governmental Affairs Policy Committee**

# **ACTION PACKET**

**Wednesday, November 4, 2009  
8:30 AM - 9:45 AM  
306 HOB**

**Larry Cretul  
Speaker**

**Robert C. "Rob" Schenck  
Chair**

**COMMITTEE MEETING REPORT**  
**Governmental Affairs Policy Committee**

**11/4/2009 8:30:00AM**

**Location:** 306 HOB

**Summary:** No Bills Considered

**Committee meeting was reported out: Wednesday, November 04, 2009 11:53:33AM**

**COMMITTEE MEETING REPORT**  
**Governmental Affairs Policy Committee**

**11/4/2009 8:30:00AM**

**Location:** 306 HOB

**Attendance:**

	<i>Present</i>	<i>Absent</i>	<i>Excused</i>
Robert Schenck (Chair)	X		
Kevin Ambler	X		
Thomas Anderson			X
Oscar Braynon II	X		
James Frishe	X		
Doug Holder			X
Paige Kreegel	X		
Rick Kriseman	X		
Debbie Mayfield	X		
Charles McBurney	X		
Scott Randolph	X		
Michelle Rehwinkel Vasilinda	X		
Kenneth Roberson	X		
Kelly Skidmore	X		
<b>Totals:</b>	<b>12</b>	<b>0</b>	<b>2</b>

Committee meeting was reported out: Wednesday, November 04, 2009 11:53:33AM

**COMMITTEE MEETING REPORT**  
**Governmental Affairs Policy Committee**

**11/4/2009 8:30:00AM**

**Location:** 306 HOB

**Other Business Appearance:**

Department of the Lottery

Leo DiBrigno, Secretary (Lobbyist) (State Employee) (At Request Of Chair) - Information Only

Department of the Lottery

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Mr. Larry Pendleton, President (At Request Of Chair) - Information Only

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Florida Sports Foundation, Spring Training Study

Dr. Mark Bonn, President & CEO (State Employee) (At Request Of Chair) - Information Only

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State Board of Administration

Ash Williams, Executive Director (Lobbyist) (State Employee) (At Request Of Chair) - Information Only

State Board of Administration

1800 Hermitage Blvd.

Tallahassee FL 32317

Phone: 850-413-1253

Committee meeting was reported out: Wednesday, November 04, 2009 11:53:33AM



## 2009 Major League Baseball Florida Spring Training Economic Impact Study



JUNE 2009

Florida Sports Foundation

&

The Bonn Marketing Research Group, Inc.

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**Acknowledgments**

A project of this magnitude involves the cooperation of many organizations and individuals in order to succeed. This project has been an example of success largely through the efforts of the leadership exhibited by the Florida Sports Foundation and Major League Baseball (MLB).

Special recognition goes to Mr. Larry Pendleton, President & CEO of the Florida Sports Foundation for his vision to realize the importance of this research project and also for his support to allow the project to be completed. Through his efforts, information has been documented about the tremendous economic value MLB spring training has upon the Florida economy.

Mr. Nick Gandy, Director of Communications, Florida Sports Foundation is to be recognized for completing the multitude of tasks necessary to make this project a reality. Mr. Gandy was very helpful in developing the relationships necessary in order for Bonn Marketing, Inc. to complete this project.

Mr. Jonathan Mariner, Executive Vice President and CFO for Major League Baseball, Office of the Commissioner, deserves recognition for supporting this project by authorizing access of necessary performance metrics used by Bonn Marketing, Inc. in economic modeling tasks. Also in the Office of the Commissioner, Ms. Kathleen Torres, Senior Vice President, Finance, and Mr. Tad Myoshi, Director of Industry Financial Reporting & Research deserve thanks for their support in generating the primary data related to operations for the 2009 MLB Florida spring training season. Without this information this study would have not been possible.

The fifteen Florida stadium managers are to be acknowledged for providing Bonn Marketing, Inc. access to selected MLB spring training games in order to complete personal interviews with attendees. Their support is greatly appreciated.

Finally, all of the 2,110 attendees that participated in our personal interviews during 2009 MLB Florida spring training games are to be thanked. The information they so willingly shared with us provided significant insight about the positive impacts MLB attendees have upon the Florida economy.

**Executive Summary**

This study was conducted to assess the economic value the 2009 Major League Baseball (MLB) Florida spring training season had upon the State of Florida. The study documents demographic and behavioral characteristics of those attendees whose expenditures contributed to the overall economic impact. Included in this economic impact analysis were operating expenditures for teams, stadiums, concessionaires and game attendees expenditures.

Total economic impacts, including direct, indirect, and induced effects were measured for output (referred to from this point on as **spending**), labor, and employment. IMPLAN, a widely accepted economic model, was used to estimate economic impact.

**During 2009, the total value of MLB Florida spring training upon the Florida economy represented \$752.3 million in total spending, which generated \$284.2 million in total labor income and supported or created 9,205 part-time and full-time jobs.**

The following analysis groups 2009 MLB Florida spring training expenditures and their economic impacts into eight segments:

**Segment 1: 2009 MLB Florida Spring Training Operating Expenditures and Economic Impacts of MLB Teams**

- MLB spring training team operating expenditures contributed \$39.21 million in total spending, which generated \$14.5 million in total labor income and supported or created 431 total part-time and full-time jobs for the State of Florida.
- The total spending of 2009 MLB spring training team operating expenditures represented 5.2% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.

**Segment 2: 2009 MLB Florida Spring Training Stadium Operating Expenditures and Economic Impacts**

- 2009 spring training stadium operating expenditures for facilities housing MLB spring training operations contributed \$14.9 million in total spending, which generated \$6.1 million in total labor income and supported or created 149 part-time and full-time jobs for the State of Florida.
- The total spending of 2009 MLB spring training stadium operating expenditures represented 2.0% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.

2009 MLB Florida Spring Training

**Segment 3: 2009 MLB Florida Spring Training Concessionaire  
Operating Expenditures and Economic Impacts**

- 2009 spring training stadium concessionaire facility operating expenditures contributed \$14.7 million in total spending, which generated \$6.0 million in total labor income and supported or created 212 part-time and full-time jobs for the State of Florida.
- The total spending of 2009 MLB spring training stadium concessionaire facility operations represented 2.0% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.

**Segment 4: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Out of State Attendees who Indicated “Attending Spring Training” was their Primary Trip purpose.**

- During the 2009 MLB Florida spring training season, **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose, contributed \$571.7 million in total spending, which generated \$241.9 million in total labor income and supported or created 7,007 part-time and full-time jobs for the State of Florida.
- The total spending by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose represented 76.0% of the total spending (\$752.3 million) for the 2009 MLB Florida spring training season.
- **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose represented 361,032 attendees or 23.12% of all 2009 MLB Florida spring training attendees.
- **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose stayed an average of 7.53 nights and had an average party size of 3.0.
- **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose spent an average of \$371.28 per party per day.



**Segment 5: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Out of State Attendees who Indicated “Other” was their Primary Trip Purpose.** (“Other” refers to attendees who chose to participate in 2009 MLB spring training as an activity but did not indicate “attending MLB spring training” was their primary trip purpose.)

- During the 2009 MLB Florida spring training season, **Out of State Attendees** who indicated reasons “other than attending MLB spring training” (referred to from this point forward as “other”) was their primary trip purpose contributed \$85.2 million in total spending, which generated \$32.5 million in total labor income and supported or created 1,070 part-time and full-time jobs for the State of Florida.
- The total spending by **Out of State Attendees** who indicated “other” was their primary trip purpose represented 2.1% of the total spending MLB Florida spring training contributed to the State of Florida.
- **Out of State Attendees** who indicated “other” was their primary trip purpose represented 389,555 attendees or 24.94% of all 2009 MLB Florida spring training attendees.
- **Out of State Attendees** who indicated “other” was their primary trip purpose stayed an average of 9.66 nights and had an average party size of 3.08.
- **Out of State Attendees** who indicated “other” was their primary trip purpose spent an average of \$395.43 per party per day.

**Segment 6: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Florida, Non-County Attendees who Stated “attending spring training” was their Primary Trip Purpose. (Florida, Non-County Attendees refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training games.)**

- During the 2009 MLB Florida spring training season **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose contributed \$15.5 million in total spending, which generated \$5.9 million in total labor income and supported or created 200 part-time and full-time jobs for the State of Florida.
- The total spending by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose represented 11.3% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.
- **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose represented 378,249 attendees or 24.22% of all 2009 MLB spring training attendees
- **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose stayed an average of 0.39 nights and had an average party size of 2.81.
- **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose spent an average of \$171.73 per party per day.

**Segment 7: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Florida, Non-County Attendees who stated "Other" was their Primary Trip Purpose.**

- During the 2009 MLB Florida spring training season, **Florida, Non-County Attendees** who stated reasons "other than attending 2009 MLB spring training" was their primary trip purpose contributed \$10.9 million in total spending, which generated \$4.1 million in total labor income and supported or created 136 part-time and full-time jobs for the State of Florida.
- The total spending of **Florida, Non-County Attendees** who stated "other" was their primary trip purpose represented 1.5% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.
- **Florida, Non-County Attendees** who stated "other" was their primary trip purpose represented 55,523 attendees or 3.55% of all 2009 MLB spring training attendees.
- **Florida, Non-County Attendees** who stated "other" was their primary trip purpose stayed an average of 3.36 nights and had an average party size of 2.68.
- **Florida, Non-County Attendees** who stated "other" was their primary trip purpose spent an average of \$314.00 per party per day.

**Segment 8: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Overall Attendees.** ("Overall" refers to the summation of the attendee segments whose expenditures have an impact upon the State of Florida (Segments 4-7). This does not include expenditures from **Florida, In-County Attendees.** **Florida, In-County Attendees** refers to attendees that reside in the same county as the stadium hosting the 2009 MLB spring training game they attended.)

- During the 2009 MLB Florida spring training season, the economic impact of **Overall Attendees** (ALL non-local attendees) spending represented \$683.5 million in total spending, which generated \$257.5 million in total labor income and supported or created 8,413 part-time and full-time jobs for the State of Florida.
- The total spending of **Overall Attendees** represented 90.8% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.
- **Overall Attendees** represented 1,184,359 or 76% of all 2009 MLB spring training attendees.
- Of the total 1,561,873 fans attending MLB Florida spring training in 2009, 377,154 or 24% of all attendees were **Florida, In-County Attendees.** **Florida, In-County Attendees** were not relevant to the impact 2009 MLB spring training has upon the State of Florida. Therefore, **Overall Attendee** data does not represent ALL 1,561,873 attendees from the 2009 MLB Florida spring training season.
- **Overall Attendees** average length of stay was 5.82 nights with an average party size of 2.95.
- **Overall Attendees** spent an average of \$313.65 per party per day.

**Introduction:**

**The Bonn Marketing Research Group, Inc. (Bonn Marketing, Inc.)** was contracted by the Florida Sports Foundation to measure the economic value that Major League Baseball (MLB) Spring Training had upon the State of Florida during 2009. In 2009, sixteen (16) MLB teams, collectively known as the Grapefruit League, housed their spring training operations in Florida. The 16 MLB teams and respective stadiums, cities and counties are listed in Table 1 and in Figure 1.

Included in the economic impact analysis are the 16 MLB team's spring training operating expenditures spent in the State of Florida, the operating expenditures of the 15 stadiums that house MLB spring training operations, the concessionaire spring training operating expenditures at the 15 stadiums, and spring training game attendee expenditures.

The following analysis groups 2009 MLB Florida spring training expenditures and their economic impacts into eight segments:

Segment 1: Operating expenditures of MLB teams.

Segment 2: Stadium operating expenditures.

Segment 3: Concessionaire operating expenditures.

Segment 4: Expenditures by **Out of State Attendees** who indicated

“attending spring training” was their primary trip purpose

Segment 5: Expenditures by **Out of State Attendees** who indicated “other” was their primary trip purpose. “Other” refers to attendees who chose to participate in MLB spring training as an activity but did not indicate “attending MLB spring training” was their primary trip purpose.

Segment 6: Expenditures by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose.

**Florida, Non-County Attendees** refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training games.

Segment 7: Expenditures by **Florida, Non-County Attendees** who stated “other” was their primary trip purpose.

Segment 8: Expenditures by **Overall Attendees**. “Overall” refers to the summation of the attendee segments whose expenditures have an impact upon the State of Florida (Segments 4-7). This does not include expenditures from **Florida, In-County Attendees**. **Florida, In-County Attendees** refers to attendees that reside in the same county as the stadium hosting the MLB spring training game they attended.

## 2009 MLB Florida Spring Training

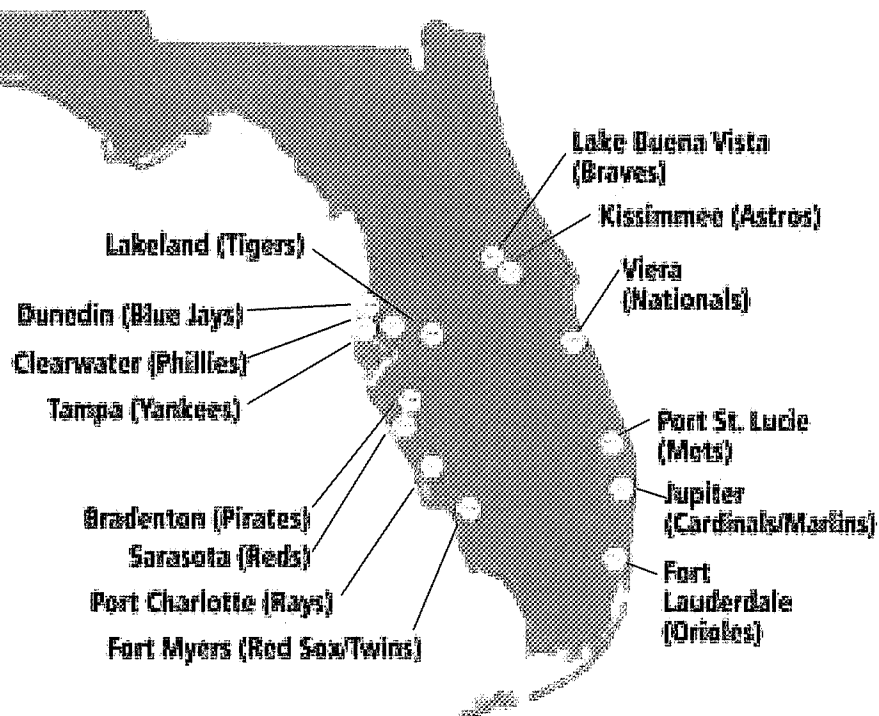
**This study only includes spring training related expenditures that occurred during the 2009 Florida spring training season. This study does not include expenditures related to any regular season MLB games nor any other baseball operations that were hosted in Florida during the rest of the calendar year. This study also includes attendee demographic and behavioral findings.**

## 2009 MLB Florida Spring Training

**TABLE 1:  
2009 MLB FLORIDA SPRING TRAINING TEAMS & LOCATIONS**

Team	Stadium	Location	Florida County
Atlanta Braves	Disney Wide World of Sports	Kissimmee, FL	Osceola
Baltimore Orioles	Fort Lauderdale Stadium	Fort Lauderdale, FL	Broward
Boston Red Sox	City of Palms Park	Fort Myers, FL	Lee
Cincinnati Reds	Ed Smith Stadium	Sarasota, FL	Sarasota
Detroit Tigers	Joker Marchant Stadium	Lakeland, FL	Polk
Florida Marlins	Roger Dean Stadium	Jupiter, FL	Palm Beach
Houston Astros	Osceola County Stadium	Kissimmee, FL	Osceola
Minnesota Twins	Hammond Stadium	Ft. Myers, FL	Lee
New York Mets	Tradition Field	Port St. Lucie, FL	St. Lucie
New York Yankees	Steinbrenner Field	Tampa, FL	Hillsborough
Philadelphia Phillies	Bright House Networks Field	Clearwater, FL	Pinellas
Pittsburgh Pirates	McKechnie Field	Bradenton, FL	Manatee
St. Louis Cardinals	Roger Dean Stadium	Jupiter, FL	Palm Beach
Tampa Bay Rays	Charlotte County Sports Park	Port Charlotte, FL	Charlotte
Toronto Blue Jays	Dunedin Stadium	Dunedin, FL	Pinellas
Washington Nationals	Space Coast Stadium	Viera, FL	Brevard

**FIGURE 1:  
2009 MLB FLORIDA SPRING TRAINING  
MAP OF STADIUM LOCATIONS**



In the following report, the nature and scale of the quantifiable impacts are summarized based upon spring training related data provided by MLB teams, stadiums, concessionaires, and attendees.

The IMPLAN program was used to assess economic impact. The IMPLAN program is a widely accepted by researchers because it uses multipliers for specific outputs to estimate the impact visitor spending generates upon labor income and employment. Many federal and state agencies have adopted the IMPLAN model for their economic analysis. These agencies include but are not limited to: the Bureau of Economic Analysis, United States Department of Agriculture (USDA), Forest Service, Florida Labor Market Statistics, Florida Department of Environmental Protection, and many other similar agencies in Florida and throughout the country. A complete list of IMPLAN clients is provided by accessing the following web address: <http://www.implan.com/references.html>.

IMPLAN uses a methodology based upon the application of various multipliers rather than one standard multiplier. IMPLAN uses more complicated input to calculate specific multipliers for spending, labor income, and employment individually. Data are collected for 528 distinct producing industry sectors of the national economy as well as the state and local economy. IMPLAN captures direct, indirect and induced effects on output, labor income and employment in all industries comprising local economies. The strength of the IMPLAN multiplier is the integration of the input-output table within its software program with a set of accounts (e.g., sectors, household, government, capital) to represent the complete set of revenue and income flows between production, income, consumption, investment, and trade. Thus, the multipliers are dynamic and fluctuating and have to be calculated for each specific economic impact analysis.

IMPLAN uses employee compensation (i.e., wage and salary payments as well as benefits, including health and life insurance, retirement payments and other non-cash compensation) and proprietor's incomes when calculating the impact of labor income.



## **Glossary of Terms**

- ✦ *Employee compensation*: wage and salary payments as well as benefits, including health and life insurance, retirement payments and other non-cash compensation.
- ✦ *Employment multiplier*: for every million dollar change in final-demand spending, the change in employment (jobs).
- ✦ *Indirect effect*: the secondary impact caused by changing input needs of directly affected industries (e.g., additional input purchases to produce additional output).
- ✦ *Induced effect*: caused by changes in household spending due to the additional employment generated by direct and indirect effects.
- ✦ *Labor income*: consists of employee compensation and proprietary income.
- ✦ *Labor income multiplier*: for every dollar change in final-demand spending, the change in income received by households.
- ✦ *Spending (Output)*: industry output is a measure of the value of goods and services produced in the study area.
- ✦ *Spending (Output) multiplier*: A spending multiplier for a sector is defined as the total production in all sectors of the economy that is necessary to satisfy a dollar's worth of final demand for that sector's output (Miller and Blair, 1985)<sup>1</sup>. In other words, every dollar change in final-demand spending changes the total value of in all sectors.
- ✦ *Proprietary income*: consists of payments received by self-employed individuals as income. This includes income received by private business owners, doctors, lawyers and so forth

<sup>1</sup> Miller, R. E., and P. Blair, 1985, *Input-Output Analysis: Foundations and Extensions*, Prentice Hall, Inc.

### **Methodology**

Game attendee spending, MLB team spending and stadium and concessionaire operating expenditures are *direct spending*. However, the total economic impact also includes both *indirect and induced effects*. The *indirect effect* is the secondary impact caused by changing input needs of directly affected industries (e.g., additional input purchases to produce additional output). And the *induced effect* is caused by changes in household spending due to the additional employment generated by direct and indirect effects. The *total economic impact* is calculated as:

Direct + Indirect + Induced.

The use of only direct spending would fail to account for increased business activities generated as the "direct" dollars were spread throughout the state in a spin-off or ripple effect. The spin-off or ripple can be quantified by the *spending multiplier*. A spending multiplier for a sector is defined as the total production in all sectors of the economy that is necessary to satisfy a dollar's worth of final demand for that sector's output (Miller and Blair, 1985). In other words, every dollar change in final-demand spending changes the total value of output in all sectors. The total economic impacts for this study have been measured for spending, labor, and employment.

### **Source of Economic Impacts: Direct Expenditures**

Direct spending consists of spring training expenditures related to attendee spending, MLB teams, stadium and concessionaire operating expenditures:

- Spring training team operating expenditures spent in Florida for the 16 MLB teams that hold MLB spring training in Florida.
- Spring training stadium operating expenditures of the 15 stadiums that house MLB spring training operations
- Spring training stadium concessionaire operating expenditures at the 15 stadiums.
- Game attendee expenditures, including **Non-County, Florida Attendees** expenditures and **Out of State Attendees** expenditures.

## 2009 MLB Florida Spring Training

### Spring Training Major League Baseball Team Operating Expenditures:

The 16 MLB teams (Table 1) that hold their spring training operations in the State of Florida represent a continuing source of economic value to the state. The MLB teams require basic goods and services of which large percentages were obtained in the State of Florida.

These expenditures did not include any spending that takes place outside of Florida, including salaries to MLB employees that were brought down for spring training but were still paid in their respective state.

Included in this economic impact analysis were expenditures for team and administrative personnel lodging and food, transportation, supplies and equipment purchases and various other miscellaneous expenditures.

Data for 2009 MLB Florida spring training team operating expenditures were collected by MLB's Office of the Commissioner from respective MLB team stadium managers. Stadium managers worked together with MLB to report the expenditures during the 2009 MLB Florida spring training season.

### Spring Training Stadium Operating Expenditures:

The 15 stadiums that were utilized to host the 16 MLB teams for spring training were a major source of economic impact. Stadium expenditures were made for goods and services and the salaries and wages that were paid to employees in the day-to-day management and maintenance of the facility.

Included in the economic impact of stadiums operating expenditures were staff salaries, game day salaries, utilities, supplies and equipment, and other various miscellaneous expenditures.

Although these stadiums were used for many other functions, only stadium operating expenditures related to MLB spring training were reported.

Data for 2009 MLB Florida spring training stadium operating expenditures were collected by MLB's Office of the Commissioner from respective MLB team stadium managers. Stadium managers worked together with MLB to report the expenditures during the 2009 MLB Florida spring training season.

## 2009 MLB Florida Spring Training

### Spring Training Concessionaire Operation Expenditures:

Another source of economic impact was derived from concessionaire operations at the 15 stadiums. Included in the economic impact were the expenditures for goods and services, salaries and wages, and miscellaneous expenses.

Concessionaire operating expenditures were collected by MLB's Office of the Commissioner. Stadium managers together with the concession operators reported concessionaire operating expenditures based upon the 2009 MLB Florida spring training season directly to MLB's Office of the Commissioner.

### Spring Training Game Attendee Expenditures:

Spring training game attendee expenditures were calculated from data collected through 1600 personal interviews at all of the 15 spring training stadiums. Attendees were surveyed during four randomly selected home games for each of the 16 MLB teams. At each home game, surveyors conducted 25 personal interviews with randomly selected attendees, totaling 100 personal interviews for each of the 16 teams. **Non-County Attendees** over the age of 21 were surveyed. Only one person per party responded to the survey.

Please see "APPENDIX I: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE SURVEY INSTRUMENT" for the attendee survey instrument. The set of instructions provided to all professionally trained surveyors can be found in "APPENDIX II: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE SURVEY INSTRUCTIONS"

Using 1600 personal interviews conducted during the 2009 MLB spring training season Bonn Marketing, Inc. reports results for this study at the 95% level of confidence with +/- 0.05 error.

Personal interviews were completed from only "**Non-County Attendees**" attending MLB spring training games. Professionally trained surveyors began the personal interview process by determining the origin of the attendee. Attendee origins were tabulated and grouped into three categories: **Florida, In-County Attendees; Florida, Non-County Attendees; Out of State Attendees.**

**Florida, In-County Attendees** refers to attendees that reside in the same county as the stadium hosting the MLB spring training game they attended. If the attendee was a **Florida, In-County Attendee** the personal interview was not further completed. Behavioral or expenditure information for **Florida, In-County Attendees** was not collected as these attendees did not contribute to the economic impact MLB Florida spring training has upon the State of Florida. The intercepts of **Florida, In-County Attendees** were documented solely to determine the proportion of **Florida, In-County Attendees** at MLB Florida spring training during the 2009 season in comparison to **Florida, Non-County Attendees** and **Out of State Attendees**.

**Florida, Non-County Attendees** refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training. Behavioral and expenditure data were collected for **Florida, Non-County Attendees**.

**Out of State Attendees** refers to attendees that reside outside of Florida including international attendees. Behavioral and expenditure data were collected for **Out-of-State Attendees**.

Of the 2110 attendees intercepted during the 2009 MLB Florida spring training season, 1014 attendees (48%) were **Out of State Attendees**, 586 attendees (28%) were **Florida, Non-County Attendees** and 510 attendees (24%) were **Florida, In-County Attendees**. Incidents of intercepts by survey site and geographic origin are summarized in Table 2 and Figure 2.

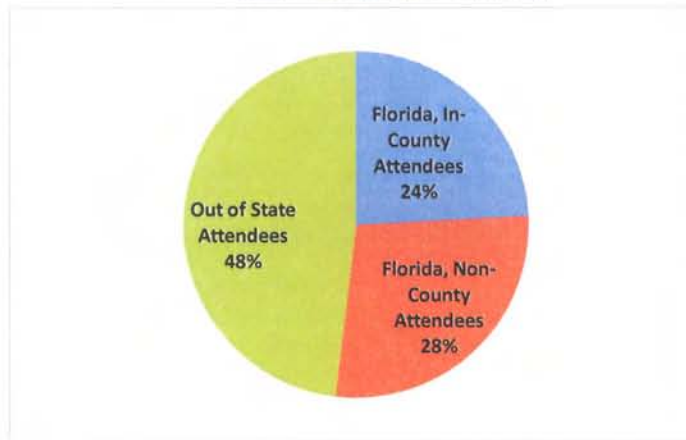
2009 MLB Florida Spring Training

TABLE 2:  
2009 MLB FLORIDA SPRING TRAINING INCIDENTS OF INTERCEPTS BY  
SURVEY SITE & GEOGRAPHIC ORIGIN

Survey Site	Total Intercepts	Florida, In-County Attendee	%	Florida, Non-County Attendees	%	Out of State Attendees	%
Atlanta Braves	105	5	5%	42	40%	58	55%
Baltimore Orioles	121	21	17%	45	37%	55	45%
Boston Red Sox	132	32	24%	28	21%	72	55%
Cincinnati Reds	124	24	19%	23	19%	77	62%
Detroit Tigers	114	14	12%	32	28%	68	60%
Florida Marlins	127	27	21%	31	24%	69	54%
Houston Astros	105	5	5%	33	31%	67	64%
Minnesota Twins	127	27	21%	13	10%	87	69%
New York Mets	154	54	35%	33	21%	67	44%
New York Yankees	185	85	46%	76	41%	24	13%
Philadelphia Phillies	115	15	13%	19	17%	81	70%
Pittsburgh Pirates	148	48	32%	43	29%	57	39%
St. Louis Cardinals	119	19	16%	27	23%	73	61%
Tampa Bay Rays	165	65	39%	61	37%	39	24%
Toronto Blue Jays	124	24	19%	29	23%	71	57%
Washington Nationals	145	45	31%	51	35%	49	34%
<b>Total</b>	<b>2110</b>	<b>510</b>	<b>24%</b>	<b>586</b>	<b>28%</b>	<b>1014</b>	<b>48%</b>

Source: Bonn Marketing, Inc.

FIGURE 2:  
2009 MLB FLORIDA SPRING TRAINING ATTENDEE INTERCEPTS BY  
GEOGRAPHIC ORIGIN



Source: Bonn Marketing, Inc.

## 2009 MLB Florida Spring Training

During the personal interview process demographic and behavioral information were gathered from MLB Florida spring training game attendees. Information collected included attendee origin, primary trip purpose, prior visits to MLB spring training, accommodation type, length of stay, travel party size, travel mode, intent to return, other activities participated in, expenditures, ethnicity, gender, education, income, marital status, and recall of advertisements related to MLB spring training in Florida. In each stadium, randomly selected attendees were interviewed and were asked to document their expenditures during the past 24 hours of their trip that were directly related to the county in which the stadium was located. Expenditure categories represented the following:

- Lodging
- Restaurant F&B
- Grocery/Convenience Stores
- Admissions, Activities & Events
- Golfing/Other Recreation
- Museums/Historical/Cultural Sites
- Evening Entertainment (Movies, Nightclubs, etc)
- Transportation (Taxi, Shuttle, Parking, Auto Rental, Fuel, etc.)
- Shopping
- All Others

Based upon attendee geographical origin and primary trip purpose 2009 MLB Florida spring training attendee expenditure data was categorized into five segments and appear throughout the report as follows:

**Segment 4: Expenditures by Out of State Attendees** who indicated “attending spring training” was their primary trip purpose

**Segment 5: Expenditures by Out of State Attendees** who indicated “other” was their primary trip purpose. “Other” refers to attendees who chose to participate in MLB spring training as an activity but did not indicate “attending MLB spring training” was their primary trip purpose.

**Segment 6: Expenditures by Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose. **Florida, Non-County Attendees** refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training games.

**Segment 7: Expenditures by Florida, Non-County Attendees** who stated “other” was their primary trip purpose.



2009 MLB Florida Spring Training

Segment 8: Expenditures by **Overall Attendees**. "Overall" refers to the summation of the attendee segments whose expenditures have an impact upon the State of Florida (Segments 4-7). This did not include expenditures from **Florida, In-County Attendees**. **Florida, In-County Attendees** refers to attendees that reside in the same county as the stadium hosting the MLB spring training game they attended.

2009 MLB Florida Spring Training Total Attendance:

Total reported attendance during the 2009 MLB Florida Spring training season was 1,561,872. A total of 259 home games were played. The average attendance per game during the 2009 MLB Florida spring training season was 6,030 attendees. Please see Table 3 for the 2009 MLB Florida spring training attendance figures by team.

TABLE 3:  
2009 MLB FLORIDA SPRING TRAINING  
ATTENDANCE FIGURES BY TEAM

2009	Season Attendance	Number of Home Games	Average Attendance per Game
Atlanta Braves	133,016	16	8,314
Baltimore Orioles	73,415	16	4,588
Boston Red Sox	117,832	15	7,855
Cincinnati Reds	77,758	15	5,184
Detroit Tigers	111,131	16	6,946
Florida Marlins	69,726	17	4,102
Houston Astros	62,326	17	3,666
Minnesota Twins	122,555	17	7,209
New York Mets	82,116	16	5,132
New York Yankees	168,922	16	10,558
Philadelphia Phillies	133,620	16	8,351
Pittsburgh Pirates	87,195	19	4,589
St. Louis Cardinals	101,740	18	5,652
Tampa Bay Rays	97,692	15	6,513
Toronto Blue Jays	68,674	16	4,292
Washington Nationals	54,154	14	3,868
<b>Total</b>	<b>1,561,872</b>	<b>259</b>	<b>6,030</b>

Source: [www.floridagraperfruitleague.com/attendance](http://www.floridagraperfruitleague.com/attendance)



**Segment 1:**  
**2009 MLB Florida Spring Operating Expenditures for MLB Teams**

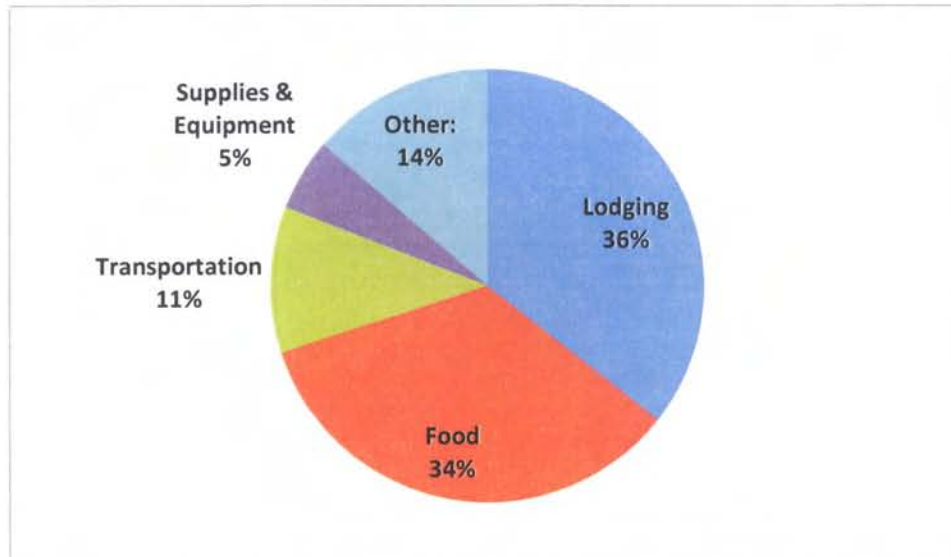
2009 operating expenditures for the sixteen (16) MLB Florida Spring Training teams included:

- Team and administrative personnel lodging
- Team and administrative personnel food
- Team and administrative personnel transportation
- Supplies and equipment purchases
- Various other miscellaneous expenditures.

These expenditures did not include any spending that takes place outside of Florida, including salaries to MLB employees that were brought down for spring training but were still paid in their respective state.

**Bonn Marketing, Inc.** calculated the average team operating expenditures based upon data provided by MLB's Office of the Commissioner. Results indicated that operating expenditures averaged \$1,433,289 per MLB team for the 2009 MLB Florida spring training season. MLB team operating expenditures by category are shown in Figure 3.

FIGURE 3:  
2009 MLB FLORIDA SPRING TRAINING  
AVERAGE MLB TEAM OPERATING EXPENDITURES:  
\$1,433,289 PER TEAM



Source: MLB Office of the Commissioners

## 2009 MLB Florida Spring Training

Direct team operating expenditures for all sixteen (16) 2009 MLB Florida spring training team operations was estimated to represent a total of \$22,932,628. This \$22,932,628 of direct spending generated by team operations produced \$8,312,885 in indirect effects and \$7,968,325 in induced effects resulting in \$39,213,808 in *total spending*. The spending multiplier (Direct + Indirect + Induced/Direct) for team operating expenditures is 1.71. That is, every dollar spent on team operating expenditures turned over 1.71 times in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated from team operating expenditures was estimated to be \$14.5 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.66. This means for every dollar change of income in any industry related to MLB spring training team operating expenditures a total income change of \$1.66 was produced in the Florida economy.

The direct spending from team operating expenditures generated more than \$14.5 million in *total labor income*, supporting or creating 431 part-time and full time jobs. This means an employee received about \$33,699 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for the region is 1.47. This multiplier indicates the support or creation of one direct job related to MLB spring training team operating expenditures resulted in a total of 1.47 jobs for Florida's economy.

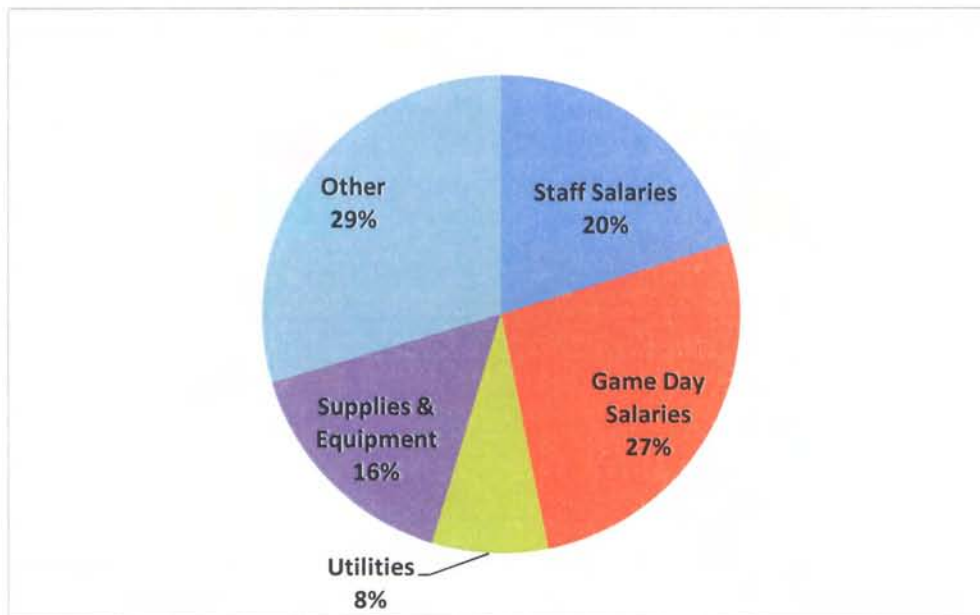
**Segment 2:**  
**2009 MLB Florida Spring Training Stadium Operating Expenditures**

Operating expenditures for the 15 stadiums utilized to host the 16 MLB teams for spring training included:

- Staff salaries
- Game day salaries
- Utilities
- Supplies and equipment
- Various other miscellaneous expenditures

Although these stadiums were used for many other functions this study reports only stadium operating expenditures related to the 2009 MLB spring training season. MLB's Office of the Commissioner provided stadium operating expenditure data to **Bonn Marketing, Inc.** The average stadium operating expenditures resulted in \$567,147 per stadium for the 2009 MLB Florida spring training season. Stadium operating expenditures by category are shown in Figure 4.

FIGURE 4:  
2009 MLB FLORIDA SPRING TRAINING  
AVERAGE STADIUM OPERATING EXPENDITURES:  
\$567,147 PER STADIUM



Source: MLB Office of the Commissioner

## 2009 MLB Florida Spring Training

Given that 15 Florida stadiums operate at an average of \$567,147 per stadium, the total direct stadium operating expenditures for 2009 MLB Florida spring training season were estimated to be \$8,507,202. This \$8,507,202 of direct spending generated by stadium operating expenditures produced \$3,046,292 in indirect effects and \$3,351,167 in induced effects resulting in a *total spending* of \$14,723,031 from stadium operating expenditures during the 2009 MLB Florida spring training season. The spending multiplier (Direct + Indirect + Induced/Direct) for stadium operating expenditures is 1.75. That is, every dollar spent on stadium operating expenditures turned over 1.75 times to the in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated from stadium operating expenditures was estimated to be \$6.1 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.59. This means for every dollar change of income in any industry related to MLB spring training stadium operating expenditures a total income change of \$1.59 is produced in the Florida economy.

The direct spending from stadium operating expenditures generated more than \$6.1 million in *total labor income*, supporting or creating 149 part-time and full time jobs. This means an employee received about \$41,241 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for the region is 1.59, indicating that the creation of one new direct job related to MLB spring training stadium operating expenditures resulted in a total of 1.59 jobs in Florida's economy.

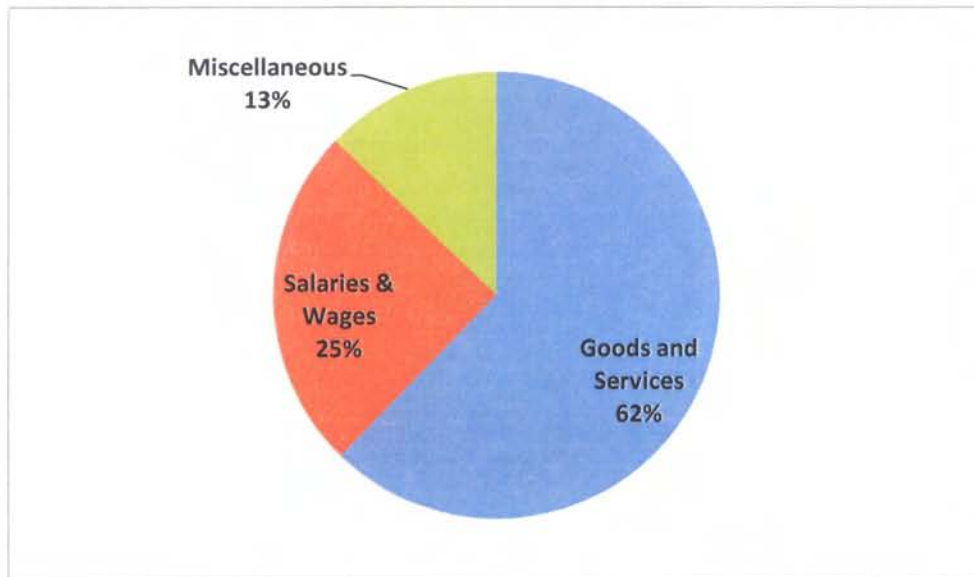
**Segment 3:**  
**2009 MLB Florida Spring Training**  
**Concessionaire Operating Expenditures**

Concessionaire operating expenditures for the 15 stadiums utilized to host the 16 MLB teams for spring training included:

- Goods and services
- Salaries and wages
- Other various miscellaneous expenditures

MLB's Office of the Commissioner provided concessionaire operating expenditure data to **Bonn Marketing, Inc.** The average concessionaire operating expenditures resulted in \$578,592 per stadium for the 2009 MLB Florida spring training season. The concessionaire operating expenditures by category are shown in Figure 5.

FIGURE 5:  
2009 MLB FLORIDA SPRING TRAINING  
AVERAGE CONCESSIONAIRE OPERATING EXPENDITURES:  
\$578,592 PER STADIUM



Source: MLB Office of the Commissioner

## 2009 MLB Florida Spring Training

It was found that MLB concessionaire operations averaged \$578,592 per stadium. The direct concessionaire operating expenditures for 2009 MLB Florida spring training season were estimated to be \$8,678,879. This direct spending generated from stadium operations produced \$2,754,839 in indirect effects and \$3,289,313 in induced effects resulting in a *total spending* of \$14,723,031 from concessionaire operating expenditures during the 2009 MLB Florida spring training season. The spending multiplier (Direct + Indirect + Induced/Direct) for concessionaire operating expenditures is 1.70. That is, every dollar spent on concessionaire operating expenditures turned over 1.70 times in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated from concessionaire operating expenditures was estimated to be \$6.0 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.52. This means for every dollar change of income in any industry related to MLB spring training concessionaire operating expenditures a total income change of \$1.52 was produced in the Florida economy.

The direct spending of concessionaire operating expenditures generated more than \$6.0 million in *total labor income*, supporting or creating 212 part-time and full time jobs. This means an employee received about \$28,492 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for the region is 1.31, indicating that the support or creation of one direct job related to MLB spring training concessionaire operating expenditures resulted in a total of 1.31 jobs for Florida's economy.

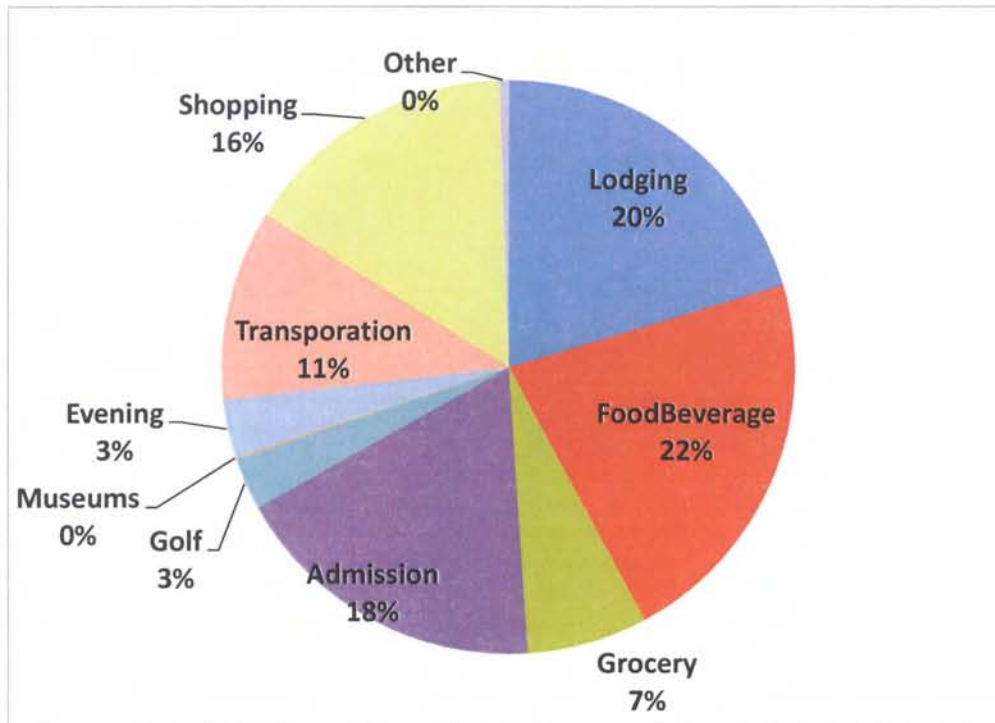


**Segment 4:**  
**2009 MLB Florida Spring Training Expenditures by Out of State Attendees who Indicated “Attending Spring Training” was their Primary Trip Purpose.**

**Bonn Marketing, Inc.** calculations determined that 361,032 MLB Florida spring training attendees (23.12% of all 2009 MLB Florida spring training attendees) were **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose. These attendees stayed an average of 7.53 nights and had an average party size of 3.0.

The average expenditures per party per day by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose were \$371.28. The expenditures by category are displayed in Figure 6.

FIGURE 6:  
2009 MLB FLORIDA SPRING TRAINING  
AVERAGE EXPENDITURES PER PARTY PER DAY  
BY **OUT OF STATE ATTENDEES** WHO INDICATED  
“ATTENDING SPRING TRAINING” WAS THEIR PRIMARY TRIP PURPOSE:  
\$371.28



Source: Bonn Marketing, Inc.

2009 MLB Florida Spring Training

Direct spending by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose was calculated by **Bonn Marketing, Inc.** using the formula:

$n \cdot LS \cdot \$EPPD / PS$ , where

$n$ =number of **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose

$LS$ = their average length of stay

$\$EPPD$ = their average expenditures per party per day

$PS$ = their average party size.

Because the primary trip purpose was “attending spring training” all expenditures throughout the duration of the trip were considered to be dollars brought into Florida by MLB Florida spring training. Therefore, direct spending by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose was calculated as follows:

$$361,032 \cdot 7.53 \cdot \$371.28 / 3.0 = \$336,450,804$$

The \$336,450,804 of direct spending generated by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose produced \$117,435,372 in indirect effects and \$117,869,136 in induced effects resulting in a *total spending* of \$571,755,312 by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose. The spending multiplier (Direct + Indirect + Induced/Direct) for expenditures by this attendee segment is 1.70. This means every dollar spent by **Out of State Attendees** who indicated a primary trip purpose of “attending spring training” turned over 1.70 times in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated by those **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose was estimated to be \$214.9 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.62. This means for every dollar change of income in any industry related to MLB spring training, generated by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose a total income change of \$1.62 was produced in the Florida economy.



## 2009 MLB Florida Spring Training

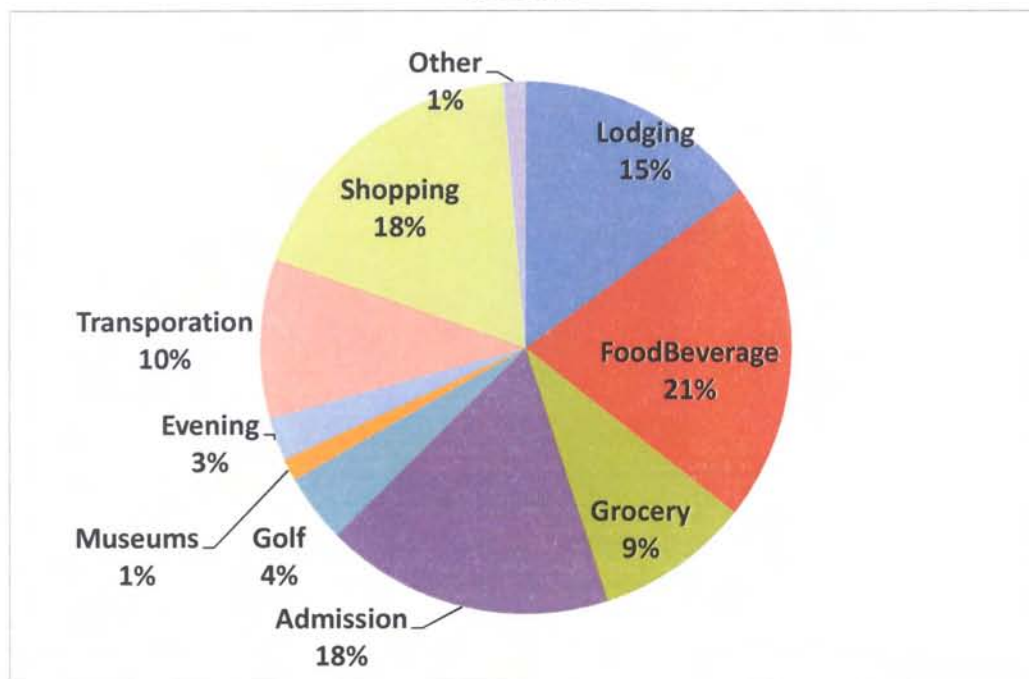
The direct spending by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose generated more than \$214.9 million in *total labor income*, supporting or creating 7,007 part-time and full time jobs. This means an employee received about \$30,669 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for this attendee segment 1.40. This indicated that the support or creation of one direct job related to MLB spring training attendee spending by **Out of State Attendees** who indicated “attending spring training” was a primary trip purpose resulted in a total of 1.40 jobs for Florida’s economy.

**Segment 5:**  
**2009 MLB Florida Spring Training Expenditures by Out of State Attendees who Indicated "Other" was their Primary Trip Purpose**

**Bonn Marketing, Inc** calculations determined 389,555 attendees (24.94% of all 2009 MLB Florida spring training attendees) were **Out of State Attendees** who indicated "other" was their primary trip purpose. These attendees stayed an average of 9.66 nights and had an average party size of 3.08.

The average expenditures per party per day by **Out of State Attendees** who indicated "other" was their primary trip purpose were \$395.43. The expenditures by category are displayed in Figure 7.

FIGURE 7:  
2009 MLB FLORIDA SPRING TRAINING  
AVERAGE EXPENDITURES PER PARTY PER DAY  
BY **OUT OF STATE ATTENDEES** WHO INDICATED  
"OTHER" WAS THEIR PRIMARY TRIP PURPOSE:  
\$395.43



Source: Bonn Marketing, Inc.

2009 MLB Florida Spring Training

Direct spending by **Out of State Attendees** who indicated "other" was their primary trip purpose was calculated by **Bonn Marketing, Inc.** using the formula:

$n * LS * \$EPPD / PS$ , where

$n$ =number of **Out of State Attendees** who indicated "other" was their primary trip purpose

$LS$ = their average length of stay

$\$EPPD$ = their average expenditures per party per day

$PS$ = their average party size.

Because the primary trip purpose of the **Out of State Attendees** was "other" than attending MLB Florida Spring training *not all* expenditures throughout the duration of the trip were considered to be dollars brought into Florida by 2009 MLB spring training.

However, attendees with a trip purpose of "other" still contribute to Florida's economy via attending MLB spring training. Because **Out of State Attendees** who indicated "other" was their primary trip purpose chose to participate in MLB spring training as an activity the length of stay attributed to attending to MLB spring training was one (1) day. Therefore, the direct spending by **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose was calculated as follows:

$$389,555 * 1 * \$395.43 / 3.08 = \$50,013,526$$

The \$50,013,526 of direct spending generated by **Out of State Attendees** who indicated "other" was their primary trip purpose produced \$17,334,208 in indirect effects and \$17,819,409 in induced effects resulting in a *total spending* of \$85,177,143. The spending multiplier (Direct + Indirect + Induced/Direct) for expenditures of **Out of State Attendees** who indicated "other" was their primary trip purpose is 1.70. This means every dollar spent by **Out of State Attendees** who indicated a primary trip purpose of "other" turned over 1.70 times in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated by **Out of State Attendees** who indicated "other" was their primary trip purpose and attended MLB spring training as an activity was estimated to be \$32.5 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.60. This means for every dollar change of income in any industry related to MLB spring training generated by **Out of State Attendees** who indicated "other" was their primary trip purpose, a total income change of \$1.60 was produced in the Florida economy.

## 2009 MLB Florida Spring Training

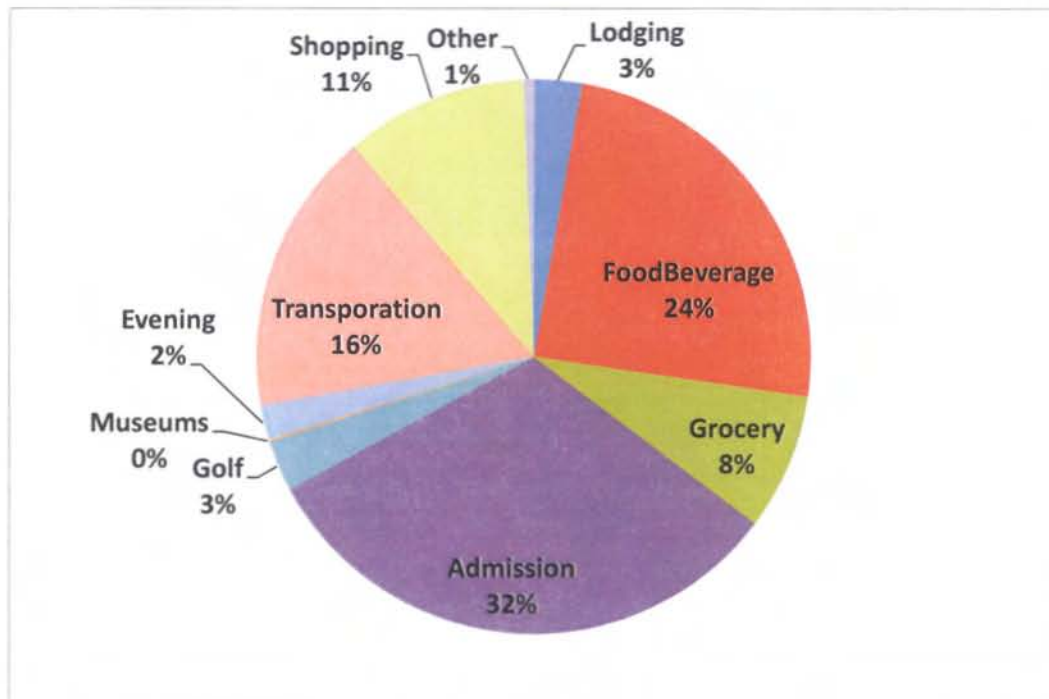
The direct spending by this attendee segment generated more than \$32.5 million in *total labor income*, supporting or creating 1,070 part-time and full time jobs. This means an employee received about \$30,361 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for this attendee segment is 1.39, indicating that the support or creation of one direct job related to MLB spring training attendee spending from **Out of State Attendees** who indicated "other" was their primary trip purpose resulted in a total of 1.39 jobs for Florida's economy.

**Segment 6:**  
**2009 MLB Florida Spring Training Expenditures by**  
**Florida, Non-County Attendees Who Stated**  
**“Attending Spring Training” was their Primary Trip Purpose**

**Bonn Marketing, Inc.** calculations determined 378,249 attendees (24.22% of all MLB spring training attendees were) **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose. These attendees stayed an average of 0.39 nights and had an average party size of 2.81.

The average expenditures per party per day by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose were \$171.73. The expenditures by category are displayed in Figure 8.

FIGURE 8:  
2009 MLB FLORIDA SPRING TRAINING  
AVERAGE EXPENDITURES PER PARTY PER DAY  
BY **FLORIDA, NON-COUNTY** ATTENDEES WHO STATED  
"ATTENDING SPRING TRAINING" WAS THEIR PRIMARY TRIP PURPOSE:  
\$171.73



Source: Bonn Marketing, Inc.

2009 MLB Florida Spring Training

Direct spending by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose was calculated by **Bonn Marketing, Inc.** using the formula:

$n * LS * \$EPPD / PS$ , where

$n$ =number of **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose

$LS$ = their average length of stay

$\$EPPD$ = their average expenditures per party per day

$PS$ = their average party size.

Because the primary trip purpose of the **Florida, Non-County Attendees** was “attending spring training” all expenditures throughout the duration of the trip were included in MLB spring training’s economic impact upon the State of Florida. Direct spending of **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose was calculated as follows:

$$378,249 * 0.39 * \$171.73 / 2.81 = \$9,015,334$$

The \$9,015,344 of direct spending generated from **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose produced \$3,262,292 in indirect effects and \$3,287,703 in induced effects resulting in a *total spending* of \$15,565,323. The spending multiplier (Direct + Indirect + Induced/Direct) for expenditures by this attendee segment is 1.73. This means every dollar spent by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose turned over 1.73 times in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose was estimated to be \$5.9 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.62. This means for every dollar change of income in any industry related to MLB spring training Florida generated by **Non-County Attendees** who stated “attending spring training” was their primary trip purpose a total income change of \$1.62 was produced in the Florida economy.

2009 MLB Florida Spring Training

The direct spending by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose generated more than \$5.9 million in *total labor income*, supporting or creating 200 part-time and full time jobs. This means an employee received about \$29,949 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for this attendee segment is 1.40, indicating that the support or creation of one direct job related to MLB spring training attendee spending from **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose resulted in a total of 1.40 jobs for Florida’s economy.

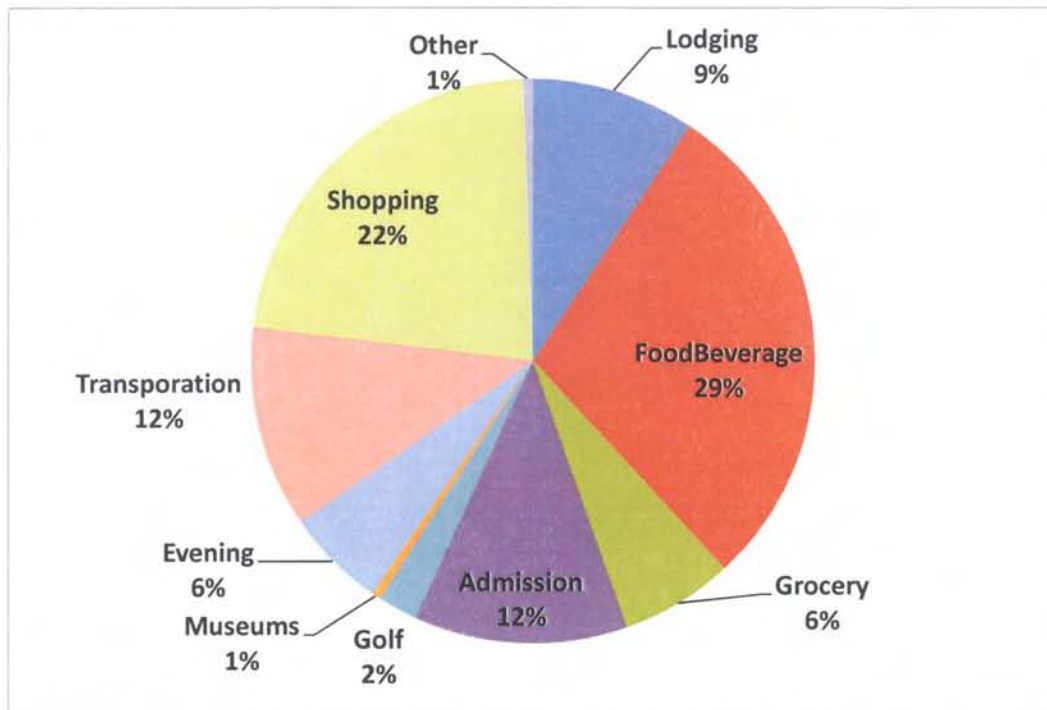


**Segment 7:**  
**2009 MLB Florida Spring Training Expenditures by Florida, Non-County Attendees who Stated "Other" was their Primary Trip Purpose**

**Bonn Marketing, Inc.** calculations determined 55,523 attendees (3.55% of all MLB spring training attendees) were **Florida, Non-County Attendees** who stated "other" was their primary trip purpose. These attendees stayed an average of 3.36 nights and had an average party size of 2.68.

The average expenditures per party per day by **Florida, Non-County Attendees** who stated "other" was their primary trip purpose were \$314.00. The expenditures by category are displayed in Figure 9.

FIGURE 9:  
2009 MLB FLORIDA SPRING TRAINING  
AVERAGE EXPENDITURES PER PARTY PER DAY  
BY **FLORIDA, NON-COUNTY ATTENDEES** WHO STATED  
"OTHER" WAS THEIR PRIMARY TRIP PURPOSE:  
\$314.00



Source: Bonn Marketing, Inc.



Direct spending by **Florida, Non-County Attendees** who stated “other” was their primary trip purpose was calculated by **Bonn Marketing, Inc.** using the formula:

$n * LS * \$EPPD / PS$ , where

$n$ =number of **Florida, Non-County Attendees** who stated “other” was their primary trip purpose

$LS$ = their average length of stay

$\$EPPD$ = their average expenditures per party per day

$PS$ = their average party size.

Because the primary trip purpose of **Florida, Non-County Attendees** was “other” than attending MLB Florida spring training *not all* expenditures throughout the duration of the trip were considered to be dollars brought into Florida by spring training.

However, attendees with a trip purpose of “other” still contribute to Florida’s economy via attending MLB spring training. Because the **Florida, Non-County Attendees** who stated “other” was their primary trip purpose chose to participate in MLB spring training as an activity the length of stay attributed to attending to MLB spring training was one (1) day. Therefore, direct spending by **Florida, Non-County Attendees** who stated “other” was their primary trip purpose was calculated as follows:

$$55,523 * 1 * \$314.00 / 2.68 = \$6,505,275$$

The \$6,505,275 of direct spending generated from **Florida, Non-County Attendees** who stated “other” was their primary trip purpose produced \$2,213,550 in indirect effects and \$2,242,753 in induced effects resulting in a *total spending* of \$10,961,573. The spending multiplier (Direct + Indirect + Induced/Direct) for expenditures by this attendee segment is 1.69. This means every dollar spent by **Florida, Non-County Attendees** who stated “other” was their primary trip purpose turned over 1.69 times in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated by those **Florida, Non-County Attendees** who stated “other” was their primary trip purpose who attended MLB spring training as an activity was estimated to be \$4.1 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.60. This means for every dollar change of income in any industry related to MLB spring training in Florida generated by **Florida, Non-County Attendees** who stated “other” was their primary trip purpose a total income change of \$1.60 was produced in the Florida economy.

2009 MLB Florida Spring Training

The direct spending by **Florida, Non-county Attendees** generated more than \$4.1 million in *total labor income*, supporting or creating 136 part-time and full time jobs. This means an employee received about \$30,075 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for this attendee segment is 1.37, indicating that the support or creation of one direct job related to MLB spring training spending from **Florida, Non-County Attendees** who stated "other" was their primary trip purpose resulted in a total of 1.37 jobs for Florida's economy.

**Segment 8:**

**2009 MLB Florida Spring Training Expenditures by Overall Attendees**

The total attendance for the 2009 MLB Florida spring training season was 1,561,873. Of the 1,561,873 fans attending MLB Florida spring training in 2009, 377,154 (24%) of all attendees were **Florida, In-County Attendees** which means they reside in the same county as the stadium hosting the MLB spring training game they attended.

**Bonn Marketing, Inc.** did not obtain expenditure information for **Florida, In-County Attendees** as their expenditures did not bring new dollars into the community. The intercepts of **Florida, In-County Attendees** were documented solely to determine the proportion of **Florida, In-County Attendees** compared with **Florida, Non-County Attendees** and **Out of State Attendees**.

The expenditures of **Florida, In-County Attendees** were not relevant to the impact MLB spring training has upon the State of Florida. Therefore, **Overall Attendees** expenditure data does not represent ALL 1,561,873 attendees from the 2009 MLB Florida spring training season. Only expenditures from 1,184,359 attendees, or 76% of total attendees, were relevant to this specific economic impact study.

The segment "**Overall Attendees**" only represents expenditure information from the four attendee segments whose expenditures were relevant to determining the economic impact 2009 MLB spring training has to the State of Florida. The four relevant segments are as follows:

- Segment 4: Expenditures by **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose
- Segment 5: Expenditures by **Out of State Attendees** who indicated "other" was their primary trip purpose. "Other" refers to attendees who chose to participate in MLB spring training as an activity but did not indicate "attending MLB spring training" was their primary trip purpose.
- Segment 6: Expenditures by **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose. **Florida, Non-County Attendees** refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training games.
- Segment 7: Expenditures by **Florida, Non-County Attendees** who stated "other" was their primary trip purpose.

**Overall Attendees** average length of stay was 5.82 nights with an average party size of 2.95. The average expenditures per party per day for **Overall Attendee** during the 2009 MLB Florida spring training season were \$313.65.

**Overall Attendees** direct spending, labor income and employment were calculated through the summation of direct spending, labor income and employment from each of the four relevant attendee segments. Therefore, **Overall Attendees** direct spending was estimated to be \$401,984,939. The indirect impact of **Overall Attendees** direct spending was \$140,255,422 while the induced impact was \$141,219,001. The *total* spending (Direct + Indirect + Induced) by **Overall Attendees** was \$683,459,362. The spending multiplier (Direct + Indirect + Induced/Direct) for expenditures of **Overall Attendees** is 1.70. This means every dollar spent by **Overall Attendees** during 2009 MLB Florida spring training turned over 1.70 times in all sectors in the State of Florida.

The *total* impact of labor income (Direct + Indirect + Induced) generated by **Overall Attendees** spending was estimated to be \$257.5 million. The labor income multiplier (Direct + Indirect + Induced/Direct) is 1.61. This means for every dollar change of income in any industry related to MLB spring training in Florida generated by **Overall Attendees** a total income change of \$1.61 was produced in the Florida economy.

The direct spending by **Overall Attendees** generated more than \$257.5 million in *total labor income*, supporting or creating 8,413 part-time and full time jobs. This means an employee received about \$30,603 in annual income with wages, benefits and other non-cash compensation included. The employment multiplier (Direct + Indirect + Induced/Direct) for **Overall Attendees** is 1.40, indicating that the support or creation of one direct job related to MLB spring training **Overall Attendees** spending resulted in a total of 1.40 jobs for Florida's economy.

2009 MLB Florida Spring Training

Table 4 details the attendance numbers and economic impacts of 2009 MLB Florida spring training attendees. Note that **Florida, In-County Attendees**, which had an attendance number of 377,514, was not included in the table because **Florida, In-County Attendees** did not contribute to the economic impact to the State of Florida.

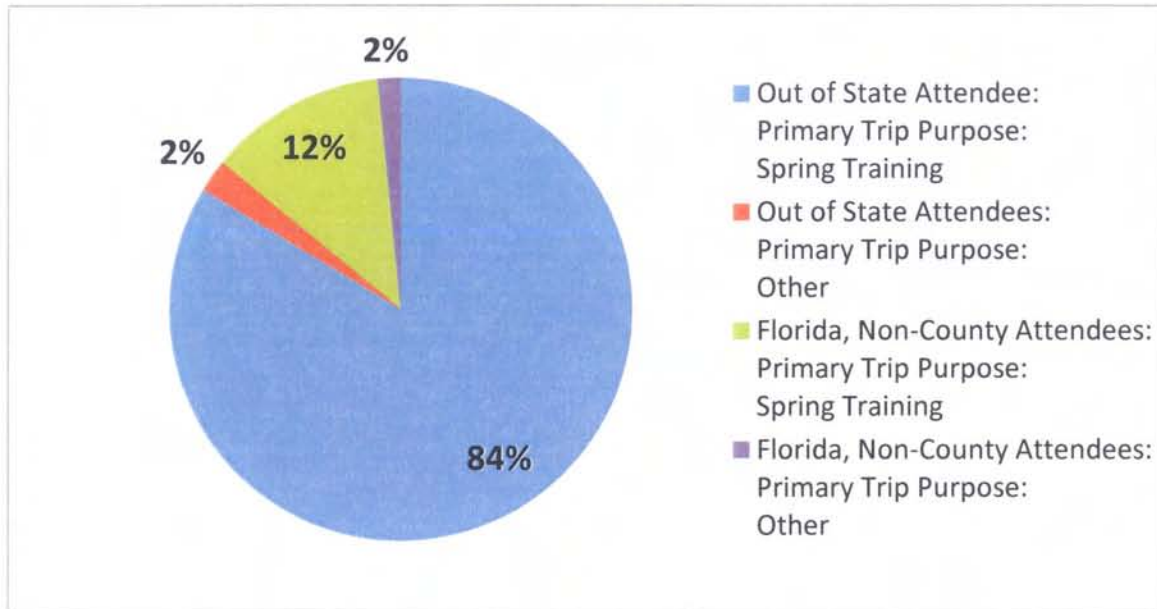
TABLE 4:  
2009 MLB FLORIDA SPRING TRAINING ATTENDANCE NUMBERS AND  
TOTAL ATTENDEE ECONOMIC IMPACTS BY ATTENDEE SEGMENT

2009 MLB Florida Spring Training: Attendee Segment	Attendance Numbers	Total Spending	Total Labor Income	Total Employment
Out of State Attendees: Primary Trip Purpose: Spring Training	361,032	\$571,755,312	\$214,903,679	7,007
Out of State Attendees: Primary Trip Purpose: Other	378,249	\$15,565,329	\$5,989,879	200
Florida, Non-County Attendees: Primary Trip Purpose: Spring Training	389,555	\$85,177,143	\$32,486,624	1,070
Florida, Non-County Attendees: Primary Trip Purpose: Other	55,523	\$10,961,578	\$4,090,285	136
<b>Overall Attendees Contribution to The State of Florida's Economy</b>	<b>1,184,359</b>	<b>\$683,459,362</b>	<b>\$257,470,467</b>	<b>8,413</b>

Source: Bonn Marketing, Inc.

2009 MLB Florida Spring Training

FIGURE 10:  
2009 MLB FLORIDA SPRING TRAINING  
OVERALL ATTENDEE TOTAL SPENDING IMPACT  
BY ATTENDEE SEGMENT:  
\$683,459,362



Source: Bonn Marketing, Inc.

**2009 MLB Florida Spring Training Economic Impact Conclusions**

1. The **total economic value** (impact) the 2009 MLB Florida spring training season had upon the Florida economy was estimated to be **\$752,300,862**.
2. The **total labor income** (Direct + Indirect + Induced) generated by the 2009 MLB Florida spring training season was estimated to be **\$284.2 million**.
3. The direct spending as a result of the 2009 MLB Florida spring training season generated more than **\$284.2 million in total labor income**, supporting or creating a **total of 9,205 part-time and full time jobs**.
4. The overall spending multiplier (Direct + Indirect + Induced/Direct) for the 2009 MLB spring training season in the State of Florida is 1.70. This means every dollar spent for MLB Florida spring training turned over 1.70 times in all sectors in the State of Florida.
5. The overall labor income multiplier (Direct + Indirect + Induced/Direct) for the 2009 MLB Florida spring training season is 1.61. This means for every dollar change of income in any industry related to MLB spring training in Florida a total income change of \$1.61 is produced in the Florida economy.
6. The overall employment multiplier (Direct + Indirect + Induced/Direct) for the 2009 MLB Florida spring training season is 1.40, indicating that the support or creation of one direct job related to 2009 MLB Florida spring training spending resulted in a total of 1.40 jobs in Florida's economy.

## 2009 MLB Florida Spring Training

The total economic value of 2009 MLB Florida spring training spending, labor income, and employment was calculated through a summation of expenditures and economic impacts from Segments 1-7. (Segment 8 is only a summation of 2009 MLB Florida spring training attendee expenditures and economic impacts):

### **Segment 1: 2009 MLB Florida Spring Training Operating Expenditures and Economic Impacts of MLB Teams**

- MLB spring training team operating expenditures contributed \$39.21 million in total spending, which generated \$14.5 million in total labor income and supported or created 431 total part-time and full-time jobs for the State of Florida.
- The total spending of 2009 MLB spring training team operating expenditures represented 5.2% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.

### **Segment 2: 2009 MLB Florida Spring Training Stadium Operating Expenditures and Economic Impacts**

- 2009 spring training stadium operating expenditures for facilities housing MLB spring training operations contributed \$14.9 million in total spending, which generated \$6.1 million in total labor income and supported or created 149 part-time and full-time jobs for the State of Florida.
- The total spending of 2009 MLB spring training stadium operating expenditures represented 2.0% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.

### **Segment 3: 2009 MLB Florida Spring Training Concessionaire Operating Expenditures and Economic Impacts**

- 2009 spring training stadium concessionaire facility operating expenditures contributed \$14.7 million in total spending, which generated \$6.0 million in total labor income and supported or created 212 part-time and full-time jobs for the State of Florida.
- The total spending of 2009 MLB spring training stadium concessionaire facility operations represented 2.0% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.



**Segment 4: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Out of State Attendees who Indicated “Attending Spring Training” was their Primary Trip purpose.**

- During the 2009 MLB Florida spring training season, **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose, contributed \$571.7 million in total spending, which generated \$241.9 million in total labor income and supported or created 7,007 part-time and full-time jobs for the State of Florida.
- The total spending by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose represented 76.0% of the total spending (\$752.3 million) for the 2009 MLB Florida spring training season.
- **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose spent an average of \$371.28 per party per day.

**Segment 5: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Out of State Attendees who Indicated “Other” was their Primary Trip Purpose.** (“Other” refers to attendees who chose to participate in 2009 MLB spring training as an activity but did not indicate “attending MLB spring training” was their primary trip purpose.)

- During the 2009 MLB Florida spring training season, **Out of State Attendees** who indicated reasons “other than attending MLB spring training” (referred to from this point forward as “other”) was their primary trip purpose contributed \$85.2 million in total spending, which generated \$32.5 million in total labor income and supported or created 1,070 part-time and full-time jobs for the State of Florida.
- The total spending by **Out of State Attendees** who indicated “other” was their primary trip purpose represented 2.1% of the total spending MLB Florida spring training contributed to the State of Florida.
- **Out of State Attendees** who indicated “other” was their primary trip purpose spent an average of \$395.43 per party per day.

**Segment 6: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Florida, Non-County Attendees who Stated “attending spring training” was their Primary Trip Purpose. (Florida, Non-County Attendees refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training games.)**

- During the 2009 MLB Florida spring training season **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose contributed \$15.5 million in total spending, which generated \$5.9 million in total labor income and supported or created 200 part-time and full-time jobs for the State of Florida.
- The total spending by **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose represented 11.3% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.
- **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose spent an average of \$171.73 per party per day.

**Segment 7: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Florida, Non-County Attendees who stated “Other” was their Primary Trip Purpose.**

- During the 2009 MLB Florida spring training season, **Florida, Non-County Attendees** who stated reasons “other than attending 2009 MLB spring training” was their primary trip purpose contributed \$10.9 million in total spending, which generated \$4.1 million in total labor income and supported or created 136 part-time and full-time jobs for the State of Florida.
- The total spending of **Florida, Non-County Attendees** who stated “other” was their primary trip purpose represented 1.5% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.
- **Florida, Non-County Attendees** who stated “other” was their primary trip purpose spent an average of \$314.00 per party per day.

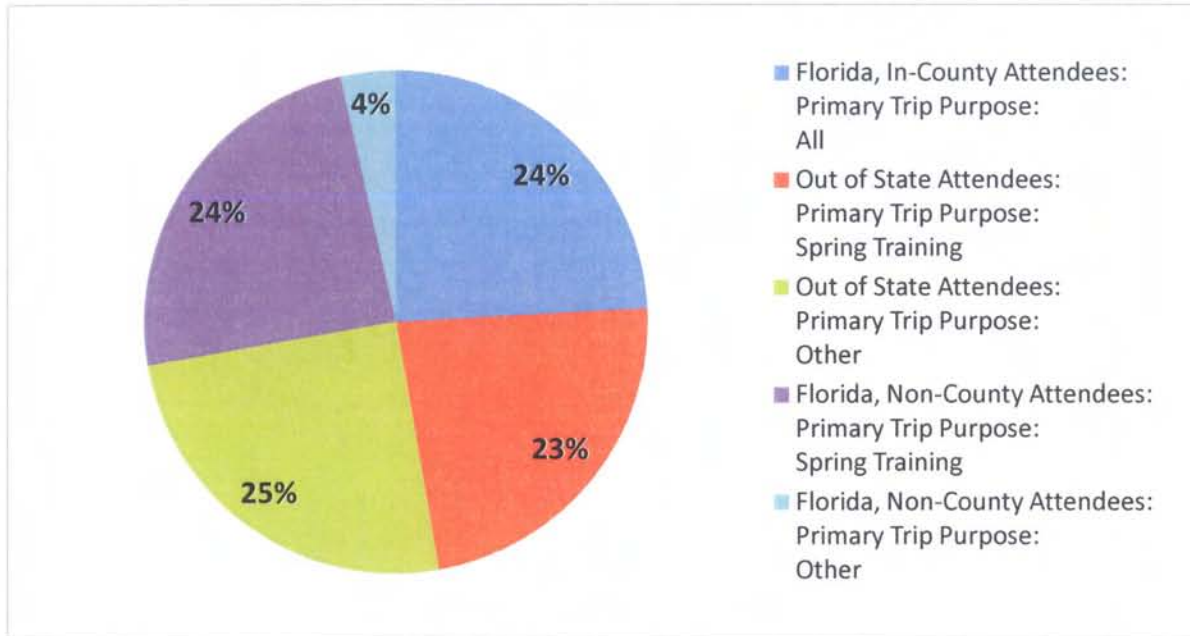
**Segment 8: 2009 MLB Florida Spring Training Expenditures and Economic Impacts of Overall Attendees.** ("Overall" refers to the summation of the attendee segments whose expenditures have an impact upon the State of Florida (Segments 4-7). This does not include expenditures from **Florida, In-County Attendees.** **Florida, In-County Attendees** refers to attendees that reside in the same county as the stadium hosting the 2009 MLB spring training game they attended.)

- During the 2009 MLB Florida spring training season, the economic impact of **Overall Attendees** (ALL non-local attendees) spending represented \$683.5 million in total spending, which generated \$257.5 million in total labor income and supported or created 8,413 part-time and full-time jobs for the State of Florida.
- The total spending of **Overall Attendees** represented 90.8% of the total spending 2009 MLB Florida spring training contributed to the State of Florida.
- **Overall Attendees** spent an average of \$313.65 per party per day.

2009 MLB Florida Spring Training

Please see the following Tables and Figures for summary information:

**FIGURE 11:**  
**2009 MLB FLORIDA SPRING TRAINING**  
**TOTAL ATTENDANCE BY ATTENDEE SEGMENT:**  
**1,561,873 ATTENDEES**



Source: Bonn Marketing, Inc.

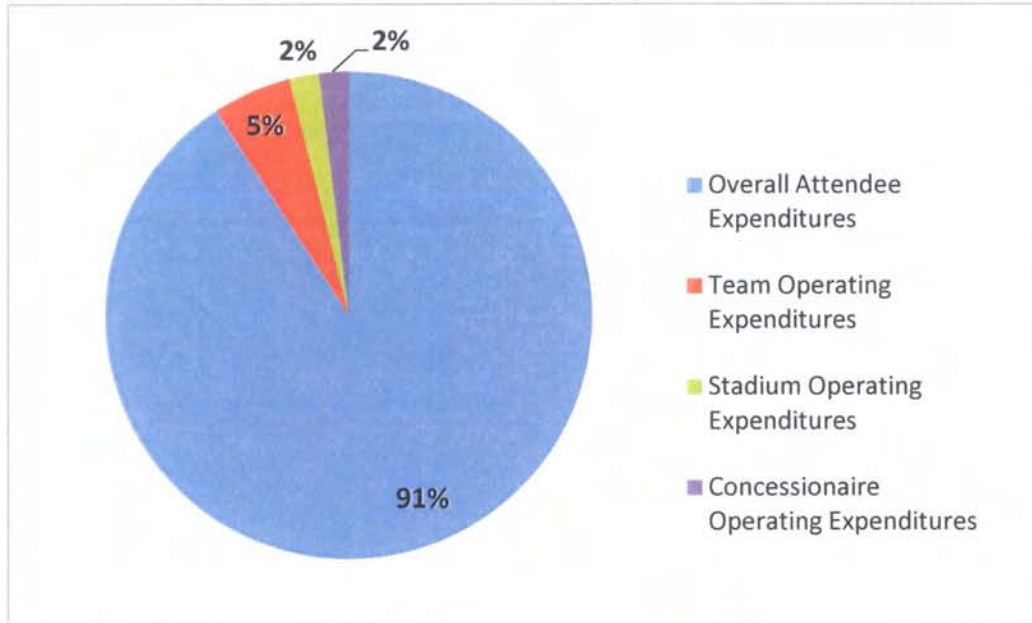
**TABLE 5:**  
**2009 MLB FLORIDA SPRING TRAINING TOTAL ATTENDANCE BY**  
**ATTENDEE SEGMENT**

2009 MLB Florida Spring Training: Attendee Segment	Attendance Numbers
Florida, In-County Attendees: Primary Trip Purpose: All	377,514
Out of State Attendees: Primary Trip Purpose: Spring Training	361,032
Out of State Attendees: Primary Trip Purpose: Other	389,555
Florida, Non-County Attendees: Primary Trip Purpose: Spring Training	378,249
Florida, Non-County Attendees: Primary Trip Purpose: Other	55,523
<b>Total Attendees</b>	<b>1,561,873</b>

Source: Bonn Marketing, Inc.

2009 MLB Florida Spring Training

**FIGURE 12:**  
**2009 MLB FLORIDA SPRING TRAINING**  
**TOTAL SPENDING IMPACT**  
**FROM OPERATIONS & ATTENDEE EXPENDITURES BY SEGMENT:**  
**\$752,300,862**



Source: Bonn Marketing, Inc.

**TABLE 6:**  
**2009 MLB FLORIDA SPRING TRAINING ATTENDEE SEGEMENT**  
**COMPARISON BY PERCENTAGE OF TOTAL ATTENDANCE AND**  
**PERCENTAGE OF TOTAL SPENDING GENERATED**  
**BY THE 2009 FLORIDA MLB SPRING TRAINING SEASON**

2009 MLB Spring Training: Attendee Segment	Percent of Total Attendance	Percent of Total Spending Generated by the 2009 MLB Florida Spring Training Season: \$752,300,862
Out of State Attendees: Primary Trip Purpose: Spring Training	23.1%	76.0%
Out of State Attendees: Primary Trip Purpose: Other	24.9%	2.1%
Florida, Non-County Attendees: Primary Trip Purpose: Spring Training	24.2%	11.3%
Florida, Non-County Attendees: Primary Trip Purpose: Other	3.6%	1.5%
Overall Attendees: Primary Trip Purpose: All	75.8%	90.9%

Source: Bonn Marketing, Inc.

2009 MLB Florida Spring Training

TABLE 7:  
2009 TOTAL SPENDING, LABOR INCOME & EMPLOYMENT IMPACT  
OF MLB FLORIDA SPRING TRAINING UPON THE STATE OF FLORIDA  
BY SEGMENT

2009 MLB Spring Training: Segments	Total Spending	Total Labor Income	Total Employment
Out of State Attendees: Primary Trip Purpose: Spring Training	\$571,755,312	\$214,903,679	7,007
Out of State Attendees: Primary Trip Purpose: Other	\$15,565,329	\$5,989,879	200
Florida, Non-County Attendees: Primary Trip Purpose: Spring Training	\$85,177,143	\$32,486,624	1,070
Florida, Non-County Attendees: Primary Trip Purpose: Other	\$10,961,578	\$4,090,285	136
Team Operating Expenditures	\$39,213,808	\$14,524,431	431
Stadium Operating Expenditures	\$14,904,661	\$6,144,920	149
Concessionaire Operating Expenditures	\$14,723,031	\$6,040,462	212
<b>Total Economic Impact Upon The State of Florida</b>	<b>\$752,300,862</b>	<b>\$284,180,280</b>	<b>9,205</b>

Source: Bonn Marketing, Inc.

**Please reference APPENDIX III for a detailed economic impact table.**



**2009 MLB Florida Spring Training**  
**Attendee Demographic and Behavioral Statistics**

**Attendee Demographic Information**

Demographic information was collected through randomly selected personal interviews with 1600 spring training attendees. Information on attendee origin, education, income, ethnicity, gender, and marital status was obtained and analyzed.

The demographic information was categorized into the following five attendee segment:

- **Overall Attendees.** This did not include demographic information from **Florida, In-County Attendees.**
- **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose.
- **Out of State Attendees** who indicated “other” was their primary trip purpose. “Other” refers to attendees who chose to participate in MLB spring training as an activity but did not have “attending MLB spring training” was their primary trip purpose.
- **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose. **Florida, Non-County Attendees** refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training.
- **Florida, Non-County Attendees** who stated “other” was their primary trip purpose.

The demographic findings for each of the five attendee segments can be found in Table 8.

2009 MLB Florida Spring Training

TABLE 8: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE DEMOGRAPHIC STATISTICS BY ATTENDEE SEGMENT (Source: Bonn Marketing, Inc.)

Segment Origin	Overall Attendees	Out of State Attendees		Florida, Non-County Attendees	
		Spring Training	Other	Spring Training	Other
<b>Segment Primary Trip Purpose</b>	<b>All</b>	<b>Spring Training</b>	<b>Other</b>	<b>Spring Training</b>	<b>Other</b>
<b>Top 10 Attendee Origin</b>					
<i>Tampa-St. Pete, FL</i>	14.90%	-	-	43.10%	24.00%
<i>Orlando, FL</i>	9.10%	-	-	25.50%	20.00%
<i>New York, NY</i>	5.30%	7.00%	9.50%	-	-
<i>Canada</i>	3.90%	5.10%	7.00%	-	-
<i>West Palm Beach, FL</i>	3.50%	-	-	9.00%	13.30%
<i>Philadelphia, PA</i>	3.40%	8.40%	2.70%	-	-
<i>Ft. Meyers - Naples, FL</i>	3.30%	-	-	8.40%	12.00%
<i>Miami – Ft. Lauderdale, FL</i>	3.20%	-	-	8.00%	13.30%
<i>Minneapolis, MN</i>	3.00%	2.90%	5.90%	-	-
<i>Boston, MA</i>	2.90%	5.10%	4.00%	-	-
<b>Education</b>					
<i>Post Graduate Degree</i>	14.00%	14.10%	16.70%	10.60%	16.00%
<i>College Graduate</i>	40.80%	41.50%	42.80%	37.30%	46.70%
<i>Some College</i>	24.60%	23.90%	20.20%	30.50%	20.00%
<i>Technical School</i>	5.40%	4.60%	5.40%	6.60%	2.70%
<i>High School Graduate/Less</i>	15.30%	16.00%	15.00%	15.00%	14.70%
<b>Income</b>					
<i>Under \$20,000</i>	4.40%	2.50%	3.90%	7.00%	1.60%
<i>\$20,000-\$49,999</i>	23.00%	18.10%	20.10%	30.10%	25.40%
<i>\$50,000-\$79,999</i>	35.30%	34.30%	38.70%	32.80%	36.50%
<i>\$80,000 +</i>	37.30%	44.90%	37.40%	30.10%	36.50%
<b>Ethnicity</b>					
<i>Caucasian</i>	87.20%	89.30%	84.90%	80.40%	80.80%
<i>African American</i>	5.50%	4.10%	7.30%	8.30%	11.00%
<i>Hispanic</i>	5.60%	5.80%	5.40%	10.90%	8.20%
<i>Other</i>	1.40%	0.80%	2.30%	0.40%	0.00%
<b>Gender</b>					
<i>Male</i>	63.60%	63.60%	61.20%	67.10%	56.00%
<i>Female</i>	36.40%	36.40%	38.80%	32.20%	44.00%
<b>Marital Status</b>					
<i>Single</i>	24.00%	23.30%	19.00%	29.30%	25.70%
<i>Married</i>	71.30%	71.10%	76.60%	66.10%	73.00%
<i>Widowed/Divorced</i>	4.70%	5.70%	4.40%	4.60%	1.40%



Key Attendee Demographic Findings by Attendee Segment

Overall Attendees

- "Tampa, St. Pete, FL" was the most common attendee origin reported by **Overall Attendees** (14.9%).
- "College Graduate" was the most frequently reported level of education for **Overall Attendees** at an average of 40.8%.
- 72.6% of **Overall Attendees** have an average household income of over \$50,000, with 37.3% of **Overall Attendees** having an average household income of over \$80,000.
- Over 87% of **Overall Attendees** for the 2009 MLB Florida spring training season were Caucasian.
- On average 63.6% of **Overall Attendees** intercepted during the 2009 MLB Florida spring training season were male compared with the 36.4% that were female.
- "Married" was the most frequently reported marital status for **Overall Attendees** at 71.3%.

**Out of State Attendees who Indicated “Attending Spring Training” was their Primary Trip Purpose**

- “Philadelphia, PA” was the most common attendee origin reported by **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose (8.4%).
- “College Graduate” was the most frequently reported level of education for **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose at an average of 41.5%.
- **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose has the highest average household income with 79.2% of **Out of State Attendees** who indicated a primary trip purpose of “attending spring training” have an average household income of over \$50,000. Of that, 44.9% have an average household income of over \$80,000.
- Over 89.3% of **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose were Caucasian, indicating that this segment was the least diverse in terms of ethnicity.
- On average 63.6% of **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose were male compared with the 36.4% that were female.
- “Married” was the most frequently reported marital status for **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose at 71.1%.

**Out of State Attendees who Indicated "Other" was their Primary Trip Purpose**

- "New York, NY" was the most common attendee origin reported by **Out of State Attendees** who indicated "other" was their primary trip purpose (9.5%).
- "College Graduate" was the most frequently reported level of education for **Out of State Attendees** who indicated a primary trip purpose of "other" at an average of 42.8%.
- This attendee segment also represented the highest percentage of attendees with a post graduate degree at 16.7%.
- 76.1% of **Out of State Attendees** who indicated "other" was their primary trip purpose have an average household income of over \$50,000. Of that, 37.4% have an average household income of over \$80,000.
- 84.9% of **Out of State Attendees** who indicated "other" was their primary trip purpose were Caucasian.
- On average 61.2% of **Out of State Attendees** who indicated "other" was their primary trip purpose were male compared with the 38.8% that were female.
- "Married" was the most frequently reported marital status for **Out of State Attendees** who indicated "other" was their primary trip purpose at 76.6%.
- This attendee segment represented the highest percentage of attendees that reported "married" was their marital status.

**Florida, Non-County Attendees who Stated "Attending Spring Training" was their Primary Trip Purpose**

- "Tampa, St. Pete, FL" was the most common attendee origin reported by **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose (43.1%).
- "College graduate" was the most frequently reported level of education for **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose at an average of 37.3%.
- **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose had the lowest percentage of "college graduates" and the highest percent of "some college" when compared to the other categories.
- 62.9% of **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose have an average household income of over \$50,000. Of that, 30.1% of **Florida, Non-County Attendees** have an average household income of over \$80,000.
- 80.4% of **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose were Caucasian.
- On average 67.1% of **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose were male compared with the 32.2% that were female.
- This attendee segment has the highest percentage of male attendees when compared to the other demographic categories.
- "Married" was the most frequently reported marital status for **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose at 66.1%.
- This attendee segment had the lowest percentage of "married" attendees and the highest percentage of "single" attendees when compared with the other demographic categories.

**Florida, Non-County Attendees who Stated "Other" was their Primary Trip Purpose**

- "Tampa, St. Pete, FL" was the most common attendee origin reported by **Florida, Non-County Attendees** who stated "other" was their primary trip purpose (24.0%).
- "College Graduate" was the most frequently reported level of education for **Florida, Non-County Attendees** who stated "other" was their primary trip purpose at an average of 46.7%.
- This attendee segment had the highest percentage of "college graduates" when compared to the other demographic categories.
- 73.0% of **Florida, Non-County Attendees** who stated "other" was their primary trip purpose have an average household income of over \$50,000. Of that, 36.5% of attendees have an average household income of over \$80,000.
- 80.8% of **Florida, Non-County Attendees** who stated "other" was their primary trip purpose were Caucasian.
- This attendee segment represents the highest percentage of African-American attendees when compared to the other demographic categories.
- On average 56.0% of **Florida, Non-County Attendees** who stated "other" was their primary trip purpose were male compared with the 44.0% that were female.
- This attendee segment represents the highest percentage of "female" attendees when compared to the other demographic categories.
- "Married" was the most frequently reported marital status **Florida, Non-County Attendees** who stated "other" was their primary trip purpose at 73.0%.

Attendee Behavioral Information

Behavioral information was collected through randomly selected personal interviews with 1600 spring training attendees. This includes information on attendee trip purpose, average expenditures per party per day, average nights spent, party size, repeat visit, number of past games attended, intent to return, accommodation type, activities participated in, travel mode, and recall of advertisements related to MLB Florida spring training.

The behavioral information was categorized into the following five attendee segments:

- **Overall Attendees.** This does not include behavioral information from **Florida, In-County Attendees**.
- **Out of State Attendees** who indicated “attending spring training” was their primary trip purpose.
- **Out of State Attendees** who indicated “other” was their primary trip purpose. “Other” refers to attendees who chose to participate in MLB spring training as an activity but did not have “attending MLB spring training” was their primary trip purpose.
- **Florida, Non-County Attendees** who stated “attending spring training” was their primary trip purpose. **Florida, Non-County Attendees** refers to attendees living in Florida but traveling outside the county in which they reside to attend MLB spring training.
- **Florida, Non-County Attendees** who stated “other” was their primary trip purpose.

The behavioral findings for each of the five attendee segments can be found in Table 9.

2009 MLB Florida Spring Training

TABLE 9: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE BEHAVIORAL STATISTICS BY ATTENDEE SEGMENT (Source: Bonn Marketing, Inc.)

Segment Origin	Overall Attendees	Out of State Attendees		Florida, Non-County Attendees	
		Spring Training	Other	Spring Training	Other
<b>Segment Trip Purpose</b>					
<b>Primary Trip Purpose</b>					
Spring Training	69.90%	100.00%	-	100.00%	-
Leisure/Pleasure	22.60%	-	78.60%	-	52.90%
Visiting Friends & Relatives	6.10%	-	17.60%	-	35.30%
Business	1.30%	-	3.80%	-	11.80%
<b>Expenditures per Party per Day</b>	\$313.65	\$371.56	\$396.12	\$176.32	\$314.00
<b>Average Nights Spent</b>	5.82	7.53	9.91	0.39	3.31
<b>Average Party Size</b>	2.95	3	3.08	2.81	2.68
<b>First Spring Training Game</b>	36.90%	29.50%	53.30%	25.70%	44.00%
<b>Games Attended in Past 3 Years</b>	8.9	9.47	6.27	9.52	5.93
<b>Intent to Return</b>	91.90%	95.20%	86.80%	94.70%	86.40%
<b>Accommodation Type</b>					
<i>Hotel/Motel</i>	31.30%	51.70%	39.00%	5.90%	21.30%
<i>No Overnight</i>	30.00%	3.50%	1.20%	84.30%	36.00%
<i>Private Homes</i>	24.10%	24.30%	37.30%	8.30%	38.70%
<i>Condo</i>	12.60%	17.60%	20.20%	1.20%	4.00%
<i>Campground/RV</i>	1.80%	2.90%	1.30%	0.40%	0.00%
<b>Travel Mode</b>					
<i>Air Service</i>	64.40%	59.90%	49.60%	1.20%	4.00%
<i>Automobile</i>	35.10%	39.30%	50.00%	98.20%	96.00%
<i>Motor Coach</i>	50.00%	0.80%	0.40%	0.60%	0.00%
<b>Activities Participated In</b>					
<i>Shopping</i>	42.30%	46.20%	68.90%	11.60%	40.50%
<i>Museums/Historical Sites</i>	28.10%	15.60%	31.50%	1.60%	9.50%
<i>Performing Arts</i>	22.30%	12.10%	28.60%	1.40%	13.50%
<i>Nature-Based</i>	20.60%	34.00%	48.40%	3.50%	16.20%
<i>Other Outdoor Recreation</i>	16.00%	28.20%	35.40%	3.10%	24.30%
<i>Golf</i>	14.20%	22.00%	35.90%	3.10%	21.60%
<b>Recall of Advertisements</b>					
<i>Internet</i>	38.10%	39.10%	38.40%	37.80%	32.00%
<i>Newspapers</i>	21.80%	21.20%	20.60%	23.70%	21.30%
<i>TV</i>	19.10%	19.30%	20.40%	17.30%	18.70%
<i>Radio</i>	12.80%	14.20%	10.30%	13.30%	16.00%
<i>Billboards</i>	5.60%	7.20%	4.40%	4.70%	8.00%
<i>Magazines</i>	6.20%	6.60%	6.50%	5.50%	5.30%

Key Attendee Behavioral Findings by Attendee Segment

Overall Attendees

- 69.9% of **Overall Attendees** reported that spring training was their primary trip purpose.
- 36.9% of **Overall Attendees** reported that they were first time attendees of MLB Florida spring training.
- The **Overall Attendees** average number of games attended in the past 3 years was 8.9 games.
- 91.9% of MLB Florida spring training **Overall Attendees** plan to attend MLB Florida spring training in the future.
- The most frequent accommodation type used by **Overall Attendees** was "Hotel/Motel" at 31.3 followed by "No Overnight" at 30.0%.
- 64.4% of **Overall Attendees** used "air service" as their travel mode.
- "Shopping" was the most common activity for **Overall Attendees** with 42.3% participating in shopping as an activity.
- "Internet" was the most common information source from which **Overall Attendees** reported that they recalled advertisements about MLB Florida spring training (38.1%).



**Out of State Attendees who indicated "Attending Spring Training" was their Primary Trip Purpose**

- 100.0% of **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose reported that spring training was their primary trip purpose.
- 29.5% of **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose reported that they were first time attendees of MLB Florida spring training.
- The average number of games attended in the past 3 years by **Out of State Attendees** who indicated a primary trip purpose of "attending spring training" was 9.47 games.
- 95.2% of **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose plan to attend MLB Florida spring training in the future.
- The most frequent accommodation type used by **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose was "Hotel/Motel" at 51.7% followed by "Private Homes" at 24.3%.
- This attendee segment has the highest percentage of "Hotel/Motel" as an accommodation type.
- 59.9% of **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose used "air service" as their travel mode.
- "Shopping" was the most common activity for **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose with 46.2% participating in shopping as an activity.
- Also, 34.0% of **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose participated in nature-based activities.
- "Internet" was the most common information source from which **Out of State Attendees** who indicated "attending spring training" was their primary trip purpose reported that they recalled advertisements about MLB Florida spring training (39.1%).

**Out of State Attendees who Indicated "Other" was their Primary Trip Purpose**

- 78.6% of **Out of State Attendees** who indicated "other" was their primary trip purpose reported that "Leisure/Pleasure" was their primary trip purpose.
- 53.3% of **Out of State Attendees** who indicated "other" was their primary trip purpose reported that they were first time attendees of MLB Florida spring training.
- The average number of games attended in the past 3 years by **Out of State Attendees** who indicated "other" was their primary trip purpose was 6.27 games.
- 86.8% of **Out of State Attendees** who indicated a primary trip purpose of "other" plan to attend MLB Florida spring training in the future.
- The most frequent accommodation type used by **Out of State Attendees** who indicated "other" was their primary trip purpose was "Hotel/Motel" at 39.0% followed by "Private Homes" at 37.3%.
- 49.6% of **Out of State Attendees** who indicated "other" was their primary trip purpose used "air service" as their travel mode.
- "Shopping" was the most common activity for **Out of State Attendees** who indicated "other" was their primary trip purpose with 68.9% participating in shopping as an activity.
- Also, 48.4% of **Out of State Attendees** who indicated "other" was their primary trip purpose participated in nature-based activities.
- "Internet" was the most common information source from which **Out of State Attendees** who indicated "other" was their primary trip purpose reported that they recalled advertisements about MLB Florida spring training (38.4%).

**Florida, Non-County Attendees who Stated "Attending Spring Training" was their Primary Trip Purpose**

- 100.0% of **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose reported that spring training was their primary trip purpose.
- 25.7% of **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose reported that they were first time attendees of MLB Florida spring training.
- The average number of games attended in the past 3 years by **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose was 9.52 games.
- 94.7% of **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose plan to attend MLB Florida spring training in the future.
- The most frequent accommodation type used by **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose was "No Overnight" at 84.3% with no overnight stay followed by "Private Homes" at 8.3%.
- This attendee segment has the highest percentage of "No Overnight" attendees.
- 98.2% of **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose used an "automobile" as their travel mode.
- "Shopping" was the most common activity for **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose with 11.6% participating in shopping as an activity.
- "Internet" was the most common information source from which for **Florida, Non-County Attendees** who stated "attending spring training" was their primary trip purpose reported that they recalled advertisements about MLB Florida spring training (37.8%).

**Florida, Non-County Attendees who Stated “Other” was their Primary Trip Purpose**

- 52.9% of **Florida, Non-County Attendees** who stated “other” was their primary trip purpose reported that “Leisure/Pleasure” was their primary trip purpose.
- 44.0% of **Florida, Non-County Attendees** who stated “other” was their primary trip purpose reported that they were first time attendees of MLB Florida spring training.
- The average number of games attended in the past 3 years by **Florida, Non-County Attendees** who stated “other” was their primary trip purpose was 5.93 games.
- 86.4% of **Florida, Non-County Attendees** who stated “other” was their primary trip purpose plan to attend MLB Florida spring training in the future.
- The most frequent accommodation type used by **Florida, Non-County Attendees** who stated “other” was their primary trip purpose was “Private Home” at 38.7% followed by “No Overnight” at 36.0%.
- 96.0% of **Florida, Non-County Attendees** who stated “other” was their primary trip purpose used an “automobile” as their travel mode.
- “Shopping” was the most common activity for **Florida, Non-County Attendees** who stated “other” was their primary trip purpose with 40.5% participating in shopping as an activity.
- “Internet” was the most common information source from which for **Florida, Non-County Attendees** who stated “other” was their primary trip purpose reported that they recalled advertisements about MLB Florida spring training (32.0%).

**Please reference “APPENDIX IV: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE PROFILE” for attendee profiles of Overall Attendees, Out of State, and Florida, Non-County intercepts.**

**APPENDIX I: 2009 MLB FLORIDA SPRING TRAINING  
ATTENDEE SURVEY INSTRUMENT**



2009 Florida's Grapefruit League  
Major League Baseball Spring Training:  
Economic Impact Study

Thank you for participating in the "2009 Major League Baseball Florida Spring Training Economic Impact Study". Your participation is important to the Florida Sports Foundation to measure the economic value MLB Spring training has to the State of Florida.

- Q1 Date: \_\_\_\_\_ Q2 Site: \_\_\_\_\_
- Q3 Visitor's Zip Code: \_\_\_\_\_ Q4 Gender: 1=Male 2=Female
- Q5 Was attending Major League Baseball Spring Training your primary reason for this trip?  
1=Yes 2=No (if not, what was?) \_\_\_\_\_
- Q6 Is this your first Major League Baseball Spring Training game?  
1=Yes 2=No
- Q7 If not, how many Major League Baseball Spring Training games have you attended in the past 3 years  
(number of games) \_\_\_\_\_
- Q8 Number of nights spent away from home during this trip: \_\_\_\_\_
- Q9 Accommodations used: (*circle appropriate number*)  
1=No overnights spent in this area on this trip  
2=Hotel/Motel  
3=Condominium  
4=Private Home of Friend/Relative  
5=Campground/RV Park
- Q10 How many people are in your travel party today? \_\_\_\_\_
- Q11 Number of Children under 18 years old in party? \_\_\_\_\_
- Q12 How did you travel to this area?  
1=Auto/RV/Camper  
2=Air Service  
3=Motor Coach  
4=Other (specify) \_\_\_\_\_
- Q13 What is the probability you will return to attend MLB Spring Training events in the future?  
1=Definitely 2=Probably 3=Undecided 4=Probably Not 5=Definitely Not
- Q14 During this visit, what other recreational activities did you/will you pursue?  
1=None  
2=Visit Museums, Historical Sites, Cultural Centers  
3=Shopping  
4=Performing Arts  
5=Visit Nature-Based Areas  
6=Golf  
7=Other Outdoor Recreation (specify) \_\_\_\_\_
- Q15 What did you enjoy the most about your visit to the area?  
\_\_\_\_\_

Please continue to the other side

# APPENDIX I: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE SURVEY INSTRUMENT

During the past 24 hours, please indicate the amount spent by your party:

- Q16 \$ \_\_\_\_\_ Lodging
- Q17 \$ \_\_\_\_\_ Restaurant F&B
- Q18 \$ \_\_\_\_\_ Grocery/Convenience Stores
- Q19 \$ \_\_\_\_\_ Admissions, Activities & Events
- Q20 \$ \_\_\_\_\_ Golfing/Other Recreation
- Q21 \$ \_\_\_\_\_ Museums/Historical/Cultural Sites
- Q22 \$ \_\_\_\_\_ Evening Entertainment (Movies, Nightclubs, etc)
- Q23 \$ \_\_\_\_\_ Transportation (Taxi, Shuttle, Parking, Auto Rental, Fuel, etc.)
- Q24 \$ \_\_\_\_\_ Shopping
- Q25 \$ \_\_\_\_\_ All Others

Q26 Ethnicity:      1=Caucasian      2=African American      3=Hispanic      4=Asian

- |   |   |
|---|---|
| <p>Q27 Education: (<i>circle one</i>)</p> <p>1=Some High School</p> <p>2=High School Graduate</p> <p>3=Technical School</p> <p>4=Some College</p> <p>5=College Graduate</p> <p>6=Post Graduate Degree</p> | <p>Q28 Total household income: (<i>circle one</i>)</p> <p>1=Under \$20,000</p> <p>2=\$20,000-\$49,000</p> <p>3=\$50,000-\$79,000</p> <p>4=\$80,000+</p> |
|---|---|

Q29 Marital status:    1=Married      2=Single      3=Widow/Divorced

Q30 Did you recall hearing or seeing advertisements about Major League Baseball Spring Training?

Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please check all that apply:  
For each advertisement seen or heard rate the helpfulness:

	Not Helpful		Helpful		Very Helpful
_____ Newspapers	1	2	3	4	5
_____ Magazines	1	2	3	4	5
_____ Billboards	1	2	3	4	5
_____ TV	1	2	3	4	5
_____ Radio	1	2	3	4	5
_____ Websites, Internet	1	2	3	4	5
_____ Other (specify)	1	2	3	4	5

**Thank you!**

## **APPENDIX II: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE SURVEY INSTRUCTIONS**



2009 Florida's Grapefruit League

Major League Baseball Spring Training:  
Economic Impact Study

### **Survey Instructions:**

Below are detailed survey instructions and tips. Read this document thoroughly and completely. Review this prior to your first site visit. Please do not hesitate to ask us any questions.

### **No Contact with Media Representatives!**

Please do not communicate with any media representatives. You will more than likely encounter very interested parties eager to have you provide quotes or sound bites for their organizations. Please refer anyone with questions to Dr. Mark Bonn at (850) 567-1826 or e-mail him at [bonn3049@comcast.net](mailto:bonn3049@comcast.net). Your job is to collect information from non-county attendees at the game.

### **Things to keep in mind before you begin your personal interview:**

1. The purpose of this study is to measure the economic value MLB Spring Training has to the state of Florida.
2. Please wear a collared shirt, shorts or pants, clean tennis shoes and the name tag provided for you.
3. You will need to complete 25 surveys at each of the four scheduled games. Please bring something to write on like a clipboard or notepad. Also bring a few pens/pencils.
4. You will ask the Spring Training attendees the questions on the survey in an interview type format. You will NOT hand them the survey and ask them to fill it out.
5. There are thirty (30) questions on the survey, front and back. Please make sure all thirty (30) questions are asked / answered completely and accurately.
6. You will have access to the stadium (inside and out) and may survey inside or outside; depending on weather.
7. These interviews are completely anonymous. There will be no way of knowing which attendee gave any particular response. If asked, please assure respondents that complete confidentiality is guaranteed.
8. Please keep your parking stubs because you will need to submit them with your completed surveys for reimbursement.
9. We will mail out your paycheck including parking reimbursement, if applicable, the day following receipt of your second and final survey package.

## **APPENDIX II: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE SURVEY INSTRUCTIONS**

### **When to Interview:**

1. Bring a photo ID with you to gain entrance to the facility and receive your game ticket.
2. You must conduct all interviews on your scheduled survey date otherwise you will not have access to the stadium. You have been assigned a fifth game as a make-up game in case of any rainouts. We will call you after each game to confirm your status. If more than one game is rained out we will revisit the schedule to make sure that at least four games are attended.
3. Please arrive at least 30 minutes prior to the start of the game. It may be easier for you to conduct interviews before the start of the game. Once your 25 interviews have been completed you are not required to stay for the duration of the game, it is your choice.

### **The Interview Screening Process:**

1. For this study, The Florida Sports Foundation and Bonn Marketing Research, Inc. are seeking responses from only "non-County residents" attending MLB Spring Training games. After introducing yourself and stating the study's purpose, begin by asking the attendee if they live in County X (the same county where the stadium is located). If the attendee does live in County X then you will not need to continue to conduct the interview with them. Thank them for their willingness to participate and let them know you are only looking to interview "non-County residents". This does not count as one of your 25 interviews. However, you will need to keep a count of the attendees who are county residents on the separate "Incidents of Intercepts by Origin" sheet that was provided to you in your package. If the respondent *is* a "non-County resident" also ask if they live in Florida or out of state and record on the "Incidents of Intercepts" sheet and continue with the interview.

After each survey date you will be able to provide us information that will show us the count of county residents compared with in-state, non-county residents and out of state residents. This is important because we want to be able to show proportions of locals vs. the other two categories.

2. We recommend that you look for people that are in "waiting areas", i.e. ticket stands, concession lines, waiting outside of restrooms, as these people have idle time. You are also welcome to place yourself in an empty seat next to an attendee during the game. Please use good judgment and do your best not to disturb other attendees.
3. Only interview one person per party over the age of 21.



## **APPENDIX II: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE SURVEY INSTRUCTIONS**

### **How to Interview:**

1. "Q1; Date", "Q2; Site" and "Q4; Gender" will be completed as you quality all survey participants.
2. Read the questions to the attendee and record their responses on the survey. This is an interview between you and a non-county resident.
3. For questions involving multiple choices, such as "Q9; Accommodation type", are best completed by asking respondents, "Which number best describes the type of accommodation you used?", or with "Q12", "Which number best describes how you traveled to the area?" Use this procedure for Q9, Q12, Q13, Q14, Q26, Q27, Q28, Q29, Q30.
4. "Q10: Travel Party" refers to the people with whom respondents are attending the game. A family of four would be a party size of four (4), a couple would be a party size of two (2), etc.
5. Q16-Q25 are extremely important questions for you to obtain. Please record the responses carefully and completely. Remember that this is for the entire party, not just the person you are interviewing. If earlier in the interview the attendee stated that they had no overnight stay then Q16 lodging should say \$0. However, if they stayed in a Hotel/Motel, Condo, or Campground then you know that there should be a dollar amount for lodging. Use logic to make sure that the attendee's responses match up to things they may have said earlier.

For Q17; Restaurants F&B, if someone tells you they spent \$10 in the last twenty-four hours for a travel party of five (5), be aware that this is not a likely situation. Remind the attendee that this question is referring to the last 24 hours for the entire party.

Q19; Admission, Activities & Events, should include the price of admission to the game for the entire party, as well as all dollars spent on recreational activities and events.

6. Q30; Information about advertisements: Read the options to all attendees (Newspapers, Magazines, etc.). They only need to rate the helpfulness of the options they selected. If they say they saw an advertisement in the Newspaper then ask them on a scale of 1-5, with 5 being the most helpful, how helpful was this information to them. If they did not see any information then put n/a and there is no need for any rating.
7. Please call with any questions or concerns.

### APPENDIX III: 2009 MLB FLORIDA SPRING TRAINING ECONOMIC IMPACTS BY SEGMENT

		Impacts	Direct	Indirect	Induced	Total	Multiplier
Segment 1	Team Operating Expenditures	Spending	\$22,932,628	\$8,312,855	\$7,968,325	\$39,213,808	1.71
		Labor Income	\$8,768,788	\$3,066,887	\$2,688,756	\$14,524,431	1.66
		Employment	294	68	69	431	1.47
Segment 2	Stadium Operating Expenditures	Spending	\$8,507,202	\$3,046,292	\$3,351,167	\$14,904,661	1.75
		Labor Income	\$3,852,792	\$1,170,899	\$1,121,229	\$6,144,920	1.59
		Employment	94	26	29	149	1.59
Segment 3	Concessionaire Operating Expenditures	Spending	\$8,678,879	\$2,754,839	\$3,289,313	\$14,723,031	1.70
		Labor Income	\$3,974,277	\$965,294	1,100,891	\$6,040,462	1.52
		Employment	162	22	28	212	1.31
Segment 4	Out of State Attendees: Primary Trip Purpose: Spring Training	Spending	\$336,450,804	\$117,435,372	\$117,869,136	\$571,755,312	1.70
		Labor Income	\$133,010,542	\$42,425,357	\$39,467,780	\$214,903,679	1.62
		Employment	5,014	984	1,009	7,007	1.40
Segment 5	Out of State Attendees: Primary Trip Purpose: Other	Spending	\$50,013,526	\$17,344,208	\$17,819,409	\$85,177,143	1.70
		Labor Income	\$20,280,004	\$6,239,897	\$5,966,723	\$32,486,624	1.60
		Employment	772	145	153	1,070	1.39
Segment 6	Florida, Non-County Attendees: Primary Trip Purpose: Spring Training	Spending	\$9,015,334	\$3,262,292	\$3,287,703	\$15,565,329	1.73
		Labor Income	\$3,702,314	\$1,186,697	\$1,100,868	\$5,989,879	1.62
		Employment	143	29	28	200	1.40
Segment 7	Florida, Non-County Attendees: Primary Trip Purpose: Other	Spending	\$6,505,275	\$2,213,550	\$2,242,753	\$10,961,578	1.69
		Labor Income	\$2,554,368	\$784,945	\$750,972	\$4,090,285	1.60
		Employment	99	18	19	136	1.37
Segment 8	Overall Attendees ***	Spending	\$401,984,939	\$140,255,422	\$141,219,001	\$683,459,362	1.70
		Labor Income	\$159,547,228	\$50,636,896	\$47,286,343	\$257,470,467	1.61
		Employment	6,028	1,176	1,209	8,413	1.40

\*\*\* "Overall Attendees" is the sum of Segments 4-7 and is not an independent group.

		Impacts	Direct	Indirect	Induced	Total	Multiplier
2009	MLB Florida Spring Training Economic Impacts	Total Spending	\$442,103,648	\$154,369,408	\$155,827,806	\$752,300,862	1.70
		Total Labor Income	\$176,143,085	\$55,839,976	\$52,197,219	\$284,180,280	1.61
		Total Employment	6,578	1,292	1,335	9,205	1.40

**APPENDIX IV: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE PROFILE**

**OVERALL ATTENDEES  
SAMPLE SIZE**

**1600**

<u>Year</u>	<u>Expenditures per Party</u>	<u>Avg. Nights Spent</u>	<u>Average Party Size</u>	<u>% Likely To Return</u>	<u>Number of Games In Past 3 Years</u>	<u>% Stayed Overnight</u>
2009	\$313.65	5.82	2.95	91.9%	8.9	69.8%

<u>Top Visitor Origins</u> <b>2009</b>	
Tampa/St. Petersburg, FL	14.9%
Orlando, FL	9.1
New York, NY	5.3
Canada	3.9
West Palm Beach, FL	3.5
Philadelphia, PA	3.4
Ft. Meyers/Naples, FL	3.3
Miami/Ft. Lauderdale, FL	3.2
Minneapolis, MN	3.0
Boston, MA	2.9

<u>Top Area Activities</u> <b>2009</b>	
Shopping	42.3%
Nature-Based Activity	28.1
Other Outdoor Recreation	22.3
Golf	20.6
Museums/Historical Sites	16.0
Performing Arts Activity	14.2

<u>Travel Mode</u> <b>2009</b>	
Air Service	64.4%
Automobile	35.1
Motor coach	0.5

<u>Primary Reason for Visit</u> <b>2009</b>	
Spring Training	69.9%
Leisure/Pleasure	22.6
Visiting Friends & Relatives	6.1
Business	1.3

<u>What Did You Enjoy Most About This Trip?</u> <b>2009</b>	
Weather/Climate	40.0 %
Baseball	24.8
Beach	7.8
Visiting Friends	6.5
Community/People	2.5
Vacation	1.4

<u>Accommodation Type</u> <b>2009</b>	
Hotel/Motel	31.3%
No Overnights	30.2
Private Home	24.1
Condominium	12.6
Campground/RV	1.8

<u>First spring training game?</u> <b>2009</b>	
Yes	36.9%
No	63.2

<u>Exposure to information or advertisements.</u> <u>Rate helpfulness on a scale from 1-5.</u> <b>2009</b>		
	<u>Exposure</u>	<u>Helpfulness</u>
Internet	38.1%	4.13
Newspapers	21.8	3.40
TV	19.1	3.18
Radio	12.8	3.04
Billboards	5.6	2.54
Magazines	6.2	2.84

<u>In-State vs. Out of State</u> <b>2009</b>	
Out of State Attendees	63.4%
Florida Non-County Attendees	36.6

<u>Ethnicity</u> <b>2009</b>	
Caucasian	87.2%
African-American	5.5
Hispanic	5.6
Asian	1.4
<u>Gender</u> <b>2009</b>	
Male	63.6%
Female	36.4

<u>Survey Intercept Sites</u> <b>2009</b>	
Phillies	6.3%
Cardinals	6.3
Astros	6.3
Marlins	6.3
Reds	6.3
Blue Jays	6.3
Pirates	6.3
Red Sox	6.3
Braves	6.3
Tigers	6.3
Twins	6.3
Orioles	6.3
Yankees	6.3
Mets	6.3
Nationals	6.3
Devil Rays	6.3

<u>Education</u> <b>2009</b>	<u>Income</u> <b>2009</b>	<u>Marital Status</u> <b>2009</b>
High School/Some H.S.	15.3%	Under \$20,000 4.4%
Technical School	5.4	\$20,000-\$49,999 23.0
Some College	24.6	\$50,000-\$79,999 35.3
College Graduate	40.8	\$80,000 or More 37.3
Post Graduate Degree	14.0	Single 24.0%
		Married 71.3
		Divorced/Widowed 4.7

**APPENDIX IV: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE PROFILE**

**OUT OF STATE  
SAMPLE SIZE**

**PRIMARY TRIP PURPOSE  
SPRING TRAINING 486  
OTHER 525**

Trip Purpose	Expenditures per Party	Avg. Nights Spent	Average Party Size	% Likely To Return	Number of Games In Past 3 Years	% Stayed Overnight
Spring Training	\$371.28	7.53	3.00	95.2%	9.95	96.5%
Other	\$395.43	9.66	3.08	86.8	6.56	98.8

Top Visitor Origins	Spring	
	Training	Other
Philadelphia, PA	8.4%	2.7%
New York, NY	7.0	9.5
Canada	5.1	7.0
Boston, MA	5.1	4.0
Houston, TX	4.1	2.1
Pittsburgh, PA	4.1	4.2
St. Louis, MO	3.7	1.1
Minneapolis, MN	2.9	5.9
Detroit, MI	2.9	3.0
Baltimore, MD	2.5	0.8

Top Area Activities	Spring	
	Training	Other
Shopping	46.2%	68.9%
Nature-Based Activity	34.0	48.4
Other Outdoor Recreation	28.2	35.4
Golf	22.0	35.9
Museums/Historical Sites	15.6	31.5
Performing Arts Activity	12.1	28.6

Travel Mode	Spring	
	Training	Other
Air Service	59.9%	49.6%
Automobile	39.3	50.0
Motor coach	0.8	0.4

Primary Reason for Visit	Spring	
	Training	Other
Spring Training	100%	-
Leisure/Pleasure	-	78.6%
Visiting Friends & Relatives	-	17.6
Business	-	3.8

What Did You Enjoy Most About This Trip?	Spring	
	Training	Other
Weather/Climate	54.7%	56.8%
Baseball	24.5	5.7
Beach	7.0	12.6
Visiting Friends	3.3	7.2
Community/People	1.2	2.5
Vacation	0.4	2.9

Accommodation Type	Spring	
	Training	Other
Hotel/Motel	51.8%	38.8%
Private Home	24.3	37.3
Condominium	17.5	20.2
No Overnights	3.5	1.4
Campground/RV	2.9	2.3

First spring training game?	Spring	
	Training	Other
Yes	29.5%	53.3%
No	70.5	46.7

Exposure to information or advertisements. Rate helpfulness on a scale from 1-5.					
	Spring Training		Other		
	Exposure	Helpfulness	Exposure	Helpfulness	
Internet	39.1%	4.13	38.4%	4.31	
Newspapers	21.2	3.40	20.6	3.69	
TV	19.3	3.18	20.4	3.69	
Radio	14.2	3.04	10.3	3.69	
Billboards	7.2	2.54	6.5	3.23	
Magazines	6.6	2.84	4.4	2.52	

Ethnicity	
Caucasian	87.2%
African-American	5.5
Hispanic	5.6
Asian	1.4

Gender	
Male	62.4%
Female	37.6

Education		Income		Marital Status	
High School/Some H.S.	15.5%	Under \$20,000	3.3%	Single	21.3%
Technical School	5.0	\$20,000-\$49,999	19.2	Married	73.7
Some College	22.0	\$50,000-\$79,999	36.4	Divorced/Widowed	5.0
College Graduate	42.0	\$80,000 or More	41.1		
Post Graduate Degree	15.5				

Survey Intercept Sites	Spring	
	Training	Other
Phillies	11.7%	4.6
Cardinals	10.9	3.4
Astros	9.7	3.8
Marlins	8.4	5.3
Reds	8.2	7.1
Blue Jays	8.0	5.7
Pirates	7.4	4.0
Red Sox	7.4	6.9
Braves	6.0	5.5
Tigers	5.3	8.0
Twins	5.3	11.6
Orioles	3.7	7.1
Yankees	3.1	1.7
Mets	2.1	10.9
Nationals	1.6	7.8
Devil Rays	1.0	6.5

**APPENDIX IV: 2009 MLB FLORIDA SPRING TRAINING ATTENDEE PROFILE**

Trip Purpose	Expenditures per Party	Avg. Nights Spent	Average Party Size	% Likely To Return	Number of Games In Past 3 Years	% Stayed Overnight
Spring Training	\$171.73	.39	2.81	94.7%	9.85	15.7%
Other	\$314.00	3.36	2.68	86.4	6.43	64.0%

<u>Top Visitor Origins</u>	<u>Spring Training</u>	
	Training	Other
Tampa/St. Petersburg	43.1%	24.0%
Orlando	25.5	20.0
West Palm Beach	9.0	13.3
Ft. Meyers/Naples	8.4	12.0
Miami/Ft. Lauderdale	8.0	13.3
Jacksonville	2.4	9.3
Panama City Beach	1.4	2.2
Tallahassee	1.2	2.7
Gainesville	1.0	2.7

<u>Top Area Activities</u>	<u>Spring Training</u>	
	Training	Other
Shopping	11.6%	40.5%
Nature-Based Activity	3.5	16.2
Other Outdoor Recreation	3.1	24.3
Golf	3.1	21.6
Museums/Historical Sites	1.6	9.5
Performing Arts Activity	1.4	13.5

<u>Travel Mode</u>	<u>Spring Training</u>	
	Training	Other
Automobile	98.2%	96.0%
Air Service	1.2	4.0
Motor coach	0.6	0.0

<u>Primary Reason for Visit</u>	<u>Spring Training</u>	
	Training	Other
Spring Training	100%	-
Leisure/Pleasure	-	52.9%
Visiting Friends & Relatives	-	35.3
Business	-	11.8

<u>What Did You Enjoy Most About This Trip?</u>	<u>Spring Training</u>	
	Training	Other
Baseball	45.3%	20.0%
Weather/Climate	12.2	16.0
Visiting Friends	6.1	25.3
Beach	3.3	9.3
Community/People	3.3	5.3
Vacation	1.0	1.3

<u>Accommodation Type</u>	<u>Spring Training</u>	
	Training	Other
No Overnights	84.3%	36.0%
Private Home	8.3	38.7
Hotel/Motel	5.9	21.3
Condominium	1.2	4.0
Campground/RV	0.4	0.0

<u>First spring training game?</u>	<u>Spring Training</u>	
	Training	Other
Yes	25.9%	44.0%
No	74.5	56.0

<u>Exposure to information or advertisements. Rate helpfulness on a scale from 1-5.</u>				
	<u>Spring Training</u>		<u>Other</u>	
	Exposure	Helpfulness	Exposure	Helpfulness
Internet	37.8%	4.24	32.0%	3.46
Newspapers	23.7	3.64	21.3	3.63
TV	17.3	3.78	18.7	3.00
Radio	13.3	3.25	16.0	2.92
Magazines	5.5	3.68	8.0	3.50
Billboards	4.7	2.86	5.3	3.50

<u>Ethnicity</u>	
Caucasian	80.7%
African-American	8.6
Hispanic	10.5
Asian	0.2
<u>Gender</u>	
Male	65.6 %
Female	34.4

<u>Education</u>		<u>Income</u>		<u>Marital Status</u>	
High School/Some H.S.	15.0%	Under \$20,000	6.4%	Single	28.8%
Technical School	6.1	\$20,000-\$49,999	29.5	Married	67.0
Some College	29.2	\$50,000-\$79,999	33.3	Divorced/Widowed	4.2
College Graduate	38.5	\$80,000 or More	30.8		
Post Graduate Degree	11.3				

<u>Survey Intercept Sites</u>	<u>Spring Training</u>	
	Training	Other
Yankees	14.3%	4.0%
Devil Rays	11.2	5.3
Nationals	8.8	8.0
Pirates	8.4	0.0
Braves	7.5	5.3
Astros	6.5	0.0
Orioles	5.9	20.0
Mets	5.3	8.0
Tigers	4.9	9.3
Red Sox	4.5	6.7
Cardinals	4.5	5.3
Marlins	4.5	10.7
Reds	4.5	0.0
Blue Jays	4.3	9.3
Phillies	3.1	2.7
Twins	1.8	5.3





CHARLIE CRIST  
*Governor*



LEO DIBENIGNO  
*Secretary*

## FLORIDA LOTTERY

October 28, 2009

The Honorable Robert Schenck  
Representative, District 44  
Florida House of Representatives  
The Lincoln Center, 12503 Spring Hill Drive  
Spring Hill, Florida 34609-5005

Dear Mr. Chairman:

During the October 6 Governmental Affairs Policy Committee meeting, you and several other committee members asked Lottery staff a number of specific questions. I would like to take this opportunity to expand on a couple of our responses.

One member asked: Who is responsible for tracking information about compulsive gambling? Lottery staff responded that the Florida Council on Compulsive Gambling (FCCG) provides the Lottery with monthly reports outlining statistical information collected from their hotline (1-888-ADMIT-IT). A copy of a recent FCCG report is enclosed so that your committee can see the types of information provided to us in these reports. As you can see, the report itself and the work of the FCCG is not lottery specific. However, the Florida Lottery is by far the largest contributor of funds to the FCCG. Their work is focused on prevention, public information, developing training programs and operating the hotline – not providing treatment services.

At the end of the committee meeting, you asked Lottery staff to provide you with information on the usage of the remotely activated kill switch for the Instant Ticket Vending Machines (ITVMs). Our representative indicated that we would provide any available data; the ITVMs, as currently configured, do not have the capability to log in memory the number of times the kill switch is used. Establishing this capability will require manufacturing and installing a new chip in each of our 1,000 ITVMs at a cost not yet determined by our gaming system vendor and ITVM supplier, GTECH. The Lottery and GTECH continue to explore this option.

Our field staff tell us that in the short time ITVMs have been deployed, the usual retailer response to a minor attempting to use one of our ITVMs has been to quickly approach the child telling them that he or she is not allowed to use the machine rather than using the kill switch. It will be much more common for a minor to be simply looking at an ITVM or pushing a button rather than attempting to make an actual purchase. Also consider the possibility that a parent or adult may give their minor child a dollar to insert into the machine and make the purchase on their behalf. That is a much more likely scenario and the few reports we've received from retailers and Lottery field staff are along those lines instead of a minor illegally trying to purchase a lottery ticket from an ITVM for their personal use.



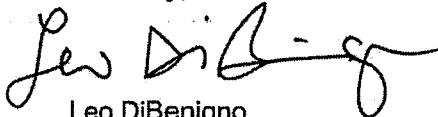


Nevertheless, underage play is against the law and something the Lottery takes very seriously. Underage play of lottery tickets is not a widespread phenomenon mainly due to the fact that all past purchases were required to be made at a counter from a retailer employee who could verify a customer's age. The Legislature understood that with a vending option, however, further strictures would be necessary. Thus, Chapter 24 calls for retailer "line of sight" location and a "lockout device". Additionally, the illegal purchase and sale of lottery tickets are considered first degree misdemeanors (see Chapter 24.116 and 24.117). The Florida Lottery is committed to upholding Chapter 24 as it pertains to underage play and ITVMs, and will work with the Legislature if further measures are proposed.

We have turned our attention to trying to broaden and improve the effectiveness of our current efforts to publicize the prohibition against underage lottery play. I asked our staff here to develop and implement a list of possible actions to be taken, e.g., regular reminders to our retailers through our terminal messaging system, partnering with the FCCG on a new public service announcement about underage play, periodic spot checks at retailer locations by our security officers. These and other ideas will ensure that over the long-term limiting underage play is part of the Lottery's public stance similar to fighting scams and being transparent with our odds of winning.

I would be happy to discuss this topic with you further if you wish. Also, if I can provide you with additional information on these issues or about the Florida Lottery in general, please don't hesitate to contact my office at (850) 487-7728 or the Office of Legislative Affairs at (850) 487-7729.

Sincerely,



Leo DiBenigno  
Secretary

LD/bw/ms

Enclosed: FCCG report for September 2009



**FLORIDA COUNCIL ON COMPULSIVE GAMBLING, INC.**  
**2009/2010 LOTTERY CONTRACT**  
**September, 2009**

**HelpLine Operation**

The FCCG will continue to operate the HelpLine by providing 24-hour staffed intervention, information and referral supports to Florida residence by phone, email, and online contact throughout the 2009-2010 contract year. Based on history and experience the Council will:

**#1 Respond to a minimum of 3,850 help and information contacts.**

- Throughout the month of September, agency staff responded to 461 help and information contacts.

Period	Help and Information Contacts		Total
September, 2009	Help – 201	Info – 260	461

Year to date help/information contacts: 1,260

**Please note "Help" contacts are people who contact FCCG seeking referrals for compulsive gambling help; "Information" contacts are people who contact FCCG seeking information about compulsive gambling, which could be used to assist compulsive gamblers.**

**#2 Maintain up-to-date professional and self-help resource referrals.**

- Agency staff updated 38 resources throughout the month of September. New resources such as faith based groups and crisis centers were added to the resource directory.

**#3 Provide professional and self-help referral resources, and offer informational materials including brochures, newsletters, recovery workbooks and other appropriate literature.**

- Throughout the month of September, the FCCG mailed 1,720 pieces of literature, brochures and workbooks to individuals contacting the HelpLine.

**#4 Compile demographic and related information from callers.**

- The FCCG continues to compile demographic information on individuals contacting the HelpLine.

**#5 Compile and report HelpLine data, in accordance with Lottery reporting directives, on a monthly basis and comprehensive findings at contract end.**

- Based on 461 respondents, 61% (280 respondents) of the help and information contacts originated from south and south central Florida. The counties with the most contacts were; Broward (18% or 81 respondents), Miami-Dade (16% or 72 respondents), Leon (12% or 54 respondents) and Palm Beach with 8% (38 respondents).

**The following information is based on 201 help contacts.**

- Based on 200 respondents, 75% (149 respondents) of the help contacts were made by the gambler. Spouses made up 8% (16 respondents), friends accounted for 6% (11 respondents), parents had 4% (7 respondents) and the remaining 7% comprised of children (7 respondents), siblings (3 respondents), relatives (5 respondents) and significant others (2 respondents).
- Based on 201 respondents, relationship problems were the top reason why contact to the HelpLine was made with 26% (53 respondents), followed by difficulty paying bills (25% or 51 respondents) and substantial loss (16% or 33 respondents).

- Based on 196 respondents, 55% (108 respondents) of the gamblers were male and 45% (88 respondents) were female.
- Based on 170 respondents, more than one third (36% or 27 out of 76 respondents) of the female gamblers were of senior age (55+) compared to just 16% (15 out of 94 respondents) of the male gamblers that fit this age group.
- Based on 166 respondents, the ethnicity of the gambler was as follows; Caucasian 61% (102 respondents), Black/African American 22% (37 respondents), Latino/Hispanics 14% (23 respondents), Asian/Pacific Islander 2% (3 respondents) and Native American 1% (1 respondent).
- Based on 201 respondents, 8% (16 respondents) of the gamblers were either active, retired or had past military experience.
- Based on 155 respondents, 30% (47 respondents) of the gamblers claimed to have started wagering before the age of 20. Based on 160 respondents outlining when gambling became a problem, 19% (31 respondents) indicated onset after the age of 55. The chart below outlines full specifics.

**Age at Which Gambling Started and When it Became a Problem**

Age Range	Age Gambling Started	Age Became a Problem
	N=155	N=160
Under 18	10 (6%)	0 (0%)
18-20	37 (24%)	9 (6%)
21-25	18 (12%)	8 (5%)
26-30	21 (14%)	21 (13%)
31-39	19 (12%)	28 (18%)
40-49	28 (18%)	48 (30%)
50-54	7 (5%)	15 (9%)
55-60	11 (7%)	15 (9%)
61-64	2 (1%)	6 (4%)
65+	2 (1%)	10 (6%)
<b>Total</b>	<b>155 (100%)</b>	<b>160 (100%)</b>

- Based on 174 respondents, slot machines were the number one problem according to 47% (82 respondents). Cards and lottery games were second and third respectively with 28% (48 respondents) and 9% (16 respondents). When breaking down cards and lottery problems into specific games, 44% (21 out of 48 respondents) of card players stated that Blackjack was the game of choice, and 75% (12 out of 16 respondents) of lottery players cited scratch off tickets as the preferred game.
- Of the 74 respondents that noted secondary gambling problems, 65% (48 respondents) stated lottery games were also a problem.
- Based on 79 respondents, females favored slot machines over lottery games 68% (54 respondents) to 11% (9 respondents) and based on 95 respondents, males favored cards over slot machines 44% (42 respondents) to 29% (28 respondents).
- Based on 175 respondents, 62% (108 respondents) claimed that land based casinos were the primary gambling location of choice. This was followed by convenience stores at 10% (18 respondents). The chart below outlines specifics in regards to the primary location.

**See Chart on Next Page**

### Primary Gambling Location

Gambling Location	Respondents
Day/Floating Casino	1 (1%)
Landbased casino	108 (62%)
Racino	7 (4%)
Jai-Alai	4 (2%)
Racetrack	11 (6%)
Convenience Store	18 (10%)
Friend's Home	2 (1%)
Home	1 (1%)
Internet	10 (6%)
*Other	13 (7%)
Total	175 (100%)

**\*Other includes: Bars, Bingo Halls, Bookies, Internet Cafes**

- Based on 114 respondents, the average income of the gambler was \$52,927. Based on 147 respondents, the average amount of money lost due to gambling was \$70,287 and based on 93 respondents, the average debt owed due to gambling was \$49,217.
- Based on 95 respondents who stated to whom the gambling debt was owed, 76% (72 respondents) said credit cards, 31% (29 respondents) stated banks/credit unions, 29% (27 respondents) cited family or friends, 20% (19 respondents) owed to loan companies and 2% (2 respondents) to bookies.
- Based on 123 respondents, 13% (16 respondents) had claimed bankruptcy due to gambling.
- Based on 163 respondents, 79% (128 respondents) were having difficulty paying house hold bills.
- Based on 148 respondents, 58% (86 respondents) had gambled away savings, retirement or equity.
- Based on 125 respondents, 42% (52 respondents) had sold or pawned assets in order to obtain money to gamble.
- Based on 158 respondents, 41% (64 respondents) had committed illegal acts to finance their gambling, and based on 140 respondents, 19% (26 respondents) had been subject to legal action because of their gambling addiction.
- Based on 167 respondents 58% (97 respondents) of the gamblers worked full time jobs and 14% (23 respondents) were unemployed. The chart below outlines specifics.

### Employment Status of the Gambler

Status	Respondents
Disabled/Workers Comp	8 (5%)
Full Time	97 (58%)
Part Time	12 (7%)
Retired	20 (12%)
Student	3 (2%)
Homemaker	4 (2%)
Unemployed	23 (14%)
Other	0 (0%)
Total	167 (100%)

- Based on 178 respondents, 48% (85 respondents) of the gamblers were married, 19% (34 respondents) were never married, 13% (23 respondents) were divorced, 8% (14 respondents) were cohabitating, 7% (12 respondents) were widowed and 6% (10 respondents) were separated.

- Based on 165 respondents, 34% (56 respondents) of the gamblers had children under the age of 18 in the household.
- Gambling problems can cause a multitude of emotional and domestic problems. The chart below shows specifics in these areas.

**Emotional and Domestic Problems**

<b>Problem</b>	<b>Respondents</b>
Anxiety	87% (146 out of 168)
Depression	85% (142 out of 167)
Family Conflict	80% (128 out of 161)
Family Violence	4% (6 out of 150)
Family Neglect	72% (113 out of 158)
Problems at Work	45% (47 out of 105)
Problems at School	67% (2 out of 3)
Suicidal Ideations or Attempts	11% (22 out of 201)

- Based on 122 respondents, 32% (39 respondents) of the gamblers came from a family where gambling was a problem.
- Based on 137 respondents, 17% (24 respondents) of the gamblers were also having problems with alcohol and/or substance abuse, and based on 124 respondents, 33% (41 respondents) of the gamblers had a family history of alcohol and/or substance abuse.
- Based on 194 respondents, 86% (167 respondents) received referrals to 12 step meetings, 69% (133 respondents) received credit counseling referrals, 65% (127 respondents) received literature and recovery workbooks, 63% (122 respondents) received information regarding self-exclusion, 61% (119 respondents) received referrals to counseling services, and 20% (38 respondents) were supplied with legal resources.
- Based on 165 respondents the most popular ways individuals heard the FCCG HelpLine were billboards (22% or 36 respondents), gambling facilities (20% or 33 respondents), the Internet (14% or 23 respondents) and the phone book (8% or 14 respondents).

**Advertising and Public Relations**

FCCG will continue to promote and build awareness of the HelpLine and outreach initiatives included in this contract through the use of advertising and public relations. The following efforts are anticipated to reach in excess of 26,000,000 throughout the contract period.

***#1 Contract with entities to aid in development of advertising concepts and designs, and the preparation of an advertising and public relations plan that builds awareness of the HelpLine statewide.***

- During the month of September, the FCCG continued the development of its outreach plan to build awareness of the HelpLine during the 09/10 fiscal year.

***#2 Develop and publish print ads in five (5) publications through media outlets including newspaper, magazine and event specific publications. Such advertising will increase awareness to over 500,000 Floridians across the State.***

- The FCCG placed an ad in the September edition of Florida Council on Aging's AgeWise newsletter for Grandparents Day. A bonus article was secured in the issue which featured the copy from the "Seniors and Gambling" rackcard and the placement was upgraded from a quarter-page to a half-page at no additional cost. AgeWise is distributed to over 800 individuals and organizations yielding an estimated 8,000 impressions.

Year to date print ads: 2

Year to date exposures: 8,000

**#3 Contract for radio and television advertisements in key markets using buy/match arrangements with station(s) to reach more than 5,000,000 listeners/viewers across the state. Provide Spanish video and public service announcements to media outlets targeting the Hispanic community.**

- The Florida News Network was utilized to reach all 67 counties throughout the state of Florida with radio ads featuring the FCCG HelpLine number. All spots will air between Mon-Sun 6a-7pm. Bonus spots will match the number of paid spots. An additional component including Navteq network in Pensacola for focus on the panhandle complimented the statewide program by making up for a low number of Pensacola stations in the statewide network. The complete flight running on 61 stations produced an estimated 3.5 million impressions. Due to tight inventory, some spots will carry over into October to make good for preemptions in September.
- The FCCG also placed ads within cable programming targeting entertainment and music cable networks such as MTV, BET, MTV Espanol, and VH-1 in Pensacola, Jacksonville, Tallahassee, and Miami. A projected 835,000 impressions for the 18-34 target audience were generated by the program. Due to tight inventory, some spots will carry over into October to make good for preemptions in September.

Year to date exposures: 4,335,000

**#4 Contract for outdoor advertising including billboards and other options such as transit and bus shelters, exposing more than 10,000,000 Floridians to FCCG programs and services. The FCCG plans to achieve this through the purchase of at least 20 billboards, 30 taxi tops, 10 bus and 10 bus shelter advertisements.**

- In September, the FCCG completed its outdoor plan and secured placement for billboard and transit ads for the remainder of the current fiscal year. Additionally, a new design was created to alternate with the standard FCCG outdoor board. As part of the "Family Matters" campaign, "Broken Heart" outdoor was developed to compliment the focus on the family for this year. The execution features a King of Hearts separated from his Jack and Queen – each with a broken heart as the suit of the card. The background resembles that of a card table with the green felt.
- During the month of September, FCCG ads featuring the HelpLine number remained posted on 80 bus shelters in the South Florida Region. These ads increased awareness of FCCG programs and services to over 39,200,000 Floridians during the month.
- Twenty-five buses in Dade County began display of the FCCG's HelpLine ad in September. Eight of the buses in Dade County feature the ad in Spanish and will travel on routes in predominantly Hispanic areas. The remaining buses will target routes to and from gaming facilities in the area such as Calder, Gulfstream, Miccosukee and Flagler. In addition, 25 ads featuring the FCCG HelpLine number remained on taxi tops in Tampa, and one bus ad continued to travel on a bus in the Bay County area during the month. These moving billboards will expose over 4,909,587 Floridians to FCCG programs and services during the month.

Year to date billboards: 0

Year to date taxi tops: 50

Year to date bus ads: 26

Year to date bus shelters: 80

Year to date exposures: 132,164,841

**#5 Provide information about FCCG HelpLine in telephone books statewide. Expand telephone directory campaign to include online search engine ads. These ads are anticipated to reach more than 10,000,000 readers statewide.**

- The FCCG exposed Floridian's to the helpline number and services through telephone directory advertising in the month of September. Outreach was made to the Hispanic population in the areas of Tampa and Orlando, with ads placed in Spanish language phone books in each of these areas. In addition, online advertising continued, which offers online search engine ads where viewers can access the HelpLine number through an Internet search. This interactive advertising achieved 866 impressions for the month. Potential exposures from all telephone directory print advertising exceeded 1,505,644 for the month.

Year to date exposures: 4,534,888

**#6 Maintain the design of the FCCG homepage. Continue strong promotion of FCCG website and forum including internet links, search engine optimization, pay-per-click and website advertising as available, with overall hits/visits anticipated to exceed 1,200,000 through all combined efforts.**

- This year, the FCCG continues to utilize the Internet to promote the HelpLine and related services through website advertising, internet links and pay-per-click services. During the month of September, the FCCG's website received 259,049 hits and 25,447 visits, 8,709 of which were unique visitors. The forums section of the site was the area visited most frequently. The agencies pay-per-click service revealed that the top three search terms utilized during this month were "gambling addiction", "gambling problem", and "gambling help".
- The FCCG maintained its Twitter account that was created last month, in an effort to reach out to a target demographic that may not otherwise have access to the FCCG HelpLine. Twitter.com is a social networking website that allows users to send short text messages up to 140 characters in length to a group of people. Twitter messages ("tweets") are not sent indiscriminately; they are only distributed to recipients who have elected to become followers. During the month of September, the FCCG sent 38 messages which included active links to our Webpage, Online Forums, Newsletters and FCCG PSAs to 36 followers.
- The FCCG continues to have links on various websites serving a variety of organizations across the state of Florida. Reported hits and visits for the month of September totaled 344,578.

Year to date hits/visits: 1,720,281

**#7 The FCCG will utilize all forms of media to raise awareness about the FCCG and its 888-ADMIT-IT HelpLine service. Conduct thirty (30) interviews and issue six (6) press releases or media alerts. In addition, if there is a significant, newsworthy event or announcement, the FCCG will hold press conference(s) as appropriate.**

- On July 17<sup>th</sup> Mid-Florida Public Radio conducted an interview with the FCCG. The interview aired on August 15<sup>th</sup> and reached over 58,000 listeners in Alachua, Marion, Gadsden, Leon Wakulla, Jefferson, Madison, Taylor, Hamilton, Suwannee, Lafayette, Dixie, Columbia, Union, Bradford, Gilchrist, Levy and Putnam Counties.
- On September 4<sup>th</sup> The Miami Herald conducted an interview with the FCCG. The article was published in print on September 5<sup>th</sup> and online on September 6<sup>th</sup>, reaching over 2,435,000 readers in Miami-Dade, Broward and Monroe Counties. The article also received 2,000 page views online.
- On September 15<sup>th</sup> The Sun Sentinel conducted an interview with the FCCG. This article went to print on September 16<sup>th</sup> and was also posted online. This article reached 225,000 readers in Broward and West Palm Beach Counties. The article also received 20,000 page views online.
- On September 24<sup>th</sup> Fox 35 News conducted an interview with the FCCG. This interview aired on September 24<sup>th</sup> at 5pm, 10pm and 11pm and reached over 1.5 million viewers in Alachua, Brevard, Flagler, Lake, Orange, Osceola, Seminole, Sumter and Volusia Counties. This interview also aired on September 25<sup>th</sup> from 5am-10am.

Year to date interviews: 14

Year to date press release/media alert: 1

Year to date exposures: 6,144,122

**#8 The FCCG will continue to develop and maintain partnerships with media representatives in major regions of the state, who are responsible for conducting interviews and responding to media demands on behalf of the Agency. The FCCG will prepare, provide materials and train media partners for press interviews on problem gambling issues. Given the high cost of travel and lodging, this approach will be more cost efficient than utilization of FCCG staff.**

- On September 30<sup>th</sup>, the FCCG provided training for the Miami-Dade media partner to respond to media requests in the South Florida region. Materials discussed and provided included current HelpLine statistics and fact sheets with updated information on problem gambling in the State of Florida.

### **Communication, Collateral & Web Development**

FCCG will continue to promote and build awareness of the HelpLine and related services through the development of communications, collateral materials and promotional items for dissemination to help and information contacts and through compulsive gambling outreach initiatives.

***#1 Print and distribute population-specific brochures, placards and posters to target general and specific under-served populations including Hispanics, African-Americans, and seniors. Through widespread dissemination, FCCG expects to reach more than 25,000 Floridians.***

- During the month of September, the FCCG reached 4,930 general and under-served consumers through the dissemination of brochures and printed materials.

Year to date dissemination: 11,617

***#2 Print and distribute A Chance for Change self-help recovery workbook series for gamblers, loved ones and older adult gamblers in English and Spanish, as a means of reaching out to target populations who may be unable to seek other avenues of help due to a lack of adequate services in their area, language and/or cultural barriers. The FCCG will offer workbooks to all HelpLine contacts in need of such supports, as well as to professionals servicing the targeted population, and expects to reach more than 7,500 Floridians.***

- During the month of September, a total of 1,162 of the Council's Recovery Workbooks for Gamblers, Loved Ones and Seniors were disseminated to Floridians in need of assistance with a gambling problem.
- In addition, a total of 98 Spanish-Language Recovery Workbooks for Gamblers, Loved Ones and Senior Gamblers were disseminated to Spanish speaking Floridians in need of assistance with a gambling problem.

Year to date distribution: 3,906

***#3 Design and distribute HelpLine awareness/outreach items which are designed to be kept and used by individuals for extended periods of time in order to provide the HelpLine number when people need assistance for a gambling problem. Exposures from this method of outreach will exceed 25,000.***

- For the month of September 5,283 Helpline items featuring the agency's crisis number were distributed to individuals attending FCCG presentations, trainings, exhibits and conferences, as well as provided to callers upon request.

Year to date exposures: 11,542

***#4 Prepare and distribute the FCCG's topical and educational newsletter, FOCUS, to at least 4,500 contacts with each issue and further distribute at conferences and other forums. Also, develop and distribute the Agency's SENIOR FOCUS newsletter to more than 3,500 senior consumers. SENIOR FOCUS will also be translated into Spanish and distributed to at least 1,500 Spanish speaking seniors in Florida.***

- The FCCG's first edition of its FOCUS newsletter is earmarked for completion in late October. Production will begin following Agency approval and distribution will follow thereafter.
- Distribution of the General FOCUS newsletter during the month of September included the dissemination of 96 General FOCUS newsletters, various editions. In addition, a total of 63 Senior FOCUS newsletters were disseminated, 1 of those being a Spanish Senior FOCUS newsletter.

Year to date FOCUS contacts: 432

Year to date SENIOR FOCUS contacts: 245

Year to date Hispanic SENIOR FOCUS contacts: 35



**#5 The FCCG will provide support for its forum members by monitoring all forums and assuring that staff is available to manage postings, including those requiring expeditious responses within a 24-hour period; and, increase promotion of the forums to populations most likely to use an online method of communication.**

- Agency staff continues to monitor the forum on a daily basis for purposes of responding to posts if needed. Throughout the month of September, 20 new members joined the forum which brings the total to 312 registered users.

During the month of September, the FCCG added a Spanish language forum to its website. The existing English language topics were translated into Spanish to broaden the scope of assistance that the online forum offers.

In addition, a new web letter is being produced and will be posted in the near future.

**#6 Support will be provided for the FCCG network of community educators through e-news on its forum Web site by including information about community educator activities, additional tools and resources, as well as newly identified trends.**

- Partners and Community Educators were provided training to use the Forum while attending the annual partner training in Fort Lauderdale. Partners will begin posting events to the Forum monthly to meet a contract deliverable encouraging networking through e-news. The FCCG News And Events article, titled "2008/09 Statistics- A Gloomy Portrait" was posted in September.

**#7 The FCCG will provide website access to its middle and high school lesson plans, for all FHSAA membership schools within the state. This website development will enable schools to access the lesson plans with greater ease and help to promote its implementation across the state.**

- Planning is ongoing to determine the most effective manner for educators to access the lesson plans via the internet.

#### **Community Education, Awareness and Prevention**

The Florida Council on Compulsive Gambling, Inc. (FCCG), in 2009-2010, will continue to cultivate relationships and partnerships in different arenas across the state to assure awareness and a strong local presence.

#### **Community Education/Partnerships**

**#1 Expand the FCCG community educator listing in areas in the state whereby current supports are scarce by identifying and training new individuals to serve in this capacity.**

- On September 30, 2009, six Community Educators (CE's) from the South Florida area were provided training on FCCG programs and Helpline services. Four CE's are bi-lingual and can provide FCCG services within Hispanic communities.

Year to date Community Educators trained: 7

**#2 Partner with the Florida Crime Prevention Association to provide community outreach within the counties they serve. The FCCG would provide training, resources and networking opportunities to association membership, and participate in the FCPA annual conference, gaining over 1,000 exposures to the HelpLine.**

- Sample FCCG collateral items, brochures and information regarding FCCG community outreach were provided to the Regional Directors at the Conference planning meeting in September. Regional Directors will receive training on FCCG materials and Helpline resources at the conference in October.

Year to date exposures: 0

**#3 The FCCG relies heavily on its community based agency partners to represent the Agency at the local level. In 2009-2010, the Agency will utilize existing and/or solicit new community partners in the areas of Broward, Dade, Duval, Hillsborough, Lee, Leon and Palm Beach counties. Each partner agency will be asked to focus on specific, underserved areas of the population. The FCCG will furnish portable exhibit displays featuring FCCG information and provide the background and materials necessary for partner agencies to staff exhibits and provide awareness and education within their local areas. Exposures derived through community partnerships will total 50,000 individuals, and professionals representing multiple organizations across the state.**

- A Partner has been identified for Leon County and contract deliverables have been assigned. Agency managers were provided materials and training in September.
- The FCCG also conducted training in September with the Miami-Dade, Broward, West Palm and Duval partners to go over contract deliverables and program planning for the fiscal year.
- Contract deliverables have been assigned to the Hillsborough Partner and training will be held in early October for deliverable clarification reporting requirements.
- During the month of September, FCCG Partners provided a total of 3,313 exposures to the Helpline. Specifics are below.
  - The West Palm Beach Partner provided the FCCG with 415 exposures from the following events.
    - On September 24, 2009, the partner provided materials and information regarding problem gambling among seniors to 150 attendees at the Hadassah Regional Meeting and Wellness Expo.
    - On September 30, 2009, the partner exhibited at the Fearless Caregivers Conference providing 265 exposures to senior prevention materials.
  - The Miami-Dade Partner provided 1,541 exposures at the following events in September.
    - On September 12, 2009, the partner dispersed FCCG materials to 1,300 consumers at the Rally for Recovery at Bicentennial Park in Miami.
    - On September 16, 2009, the partner provided prevention resources to 125 adolescents at the We Are Change Workshop at the Miami Dade College Wolfson Campus.
    - On September 25, 2009, the partner provided 100 adults with FCCG materials at the Zion Babbit Church Re-Entry Fair.
    - On September 23, 2009 the partner presented FCCG information at a workshop for 16 members of the Christ Episcopal Church.
  - The Broward Partner provided the FCCG with 1,220 exposures in September at the following events.
    - On September 24, 2009 the partner provided ten (10) seniors residing at the Joseph Meyerhoff Senior Center with brochures and helpline information.
    - On September 5, 12, and 19, 2009, the Partner provided a total of 1,210 consumers attending the Southwest Regional Library in Pembroke Pines with promotional items and brochures. The library provides weekly community outreach events for a largely Hispanic population.
  - The Duval Partner provided 137 exposures to the Helpline resource at the following events.
    - On September 23, 2009, the Partner exhibited materials to 110 students and educators at the Florida State College in Jacksonville.
    - On September 26, 2009, the Partner provided a presentation on problem and compulsive gambling to twenty-seven (27) adolescents at the Empowerment Resources Workshop.

Year to date exposures: 3,993

**#4 The FCCG will work with partner Agencies who will engage in community mobilization and outreach within Spanish speaking communities in the state. Outreach activities will include the distribution of the FCCG Spanish literature and collateral materials. Overall, it is anticipated that the FCCG will provide outreach to more than 5,000 individuals in the Hispanic community.**

- The FCCG reached out to stakeholders in South Florida Hispanic communities in September in effort to engage these individuals and begin the community mobilization process. Several individuals were identified and attended the FCCG's Community Educator training (see Community Education #1 above). In addition, key officials at Doral Airport West Chamber of Commerce, South East Florida Venezuelan Lions Club, and Hispanic Unity, all agreed to future partnership in promotion of FCCG programs either through participation in events or utilization and dissemination of materials.
- In September, the FCCG provided resources and materials to a total of 230 Hispanic consumers at The Re-boot Your Community Kick-Off Rally and the Sembrando Flores Family Day.
- During the month of September, the FCCG reached 170 individuals in the Hispanic Community through the dissemination of brochures and printed materials.

Year to date exposures: 791

**#5 Due to the high rate of suicide ideation among compulsive gamblers which can be as high as 55%, it is important to work with professionals and organizations in the field of suicide to better understand and identify those with gambling related problems in order to provide appropriate services for this population. The FCCG will educate crisis line staff in the State of Florida in order to screen for and refer individuals with gambling problems to the FCCG for services. The FCCG will work with other organizations in the state directly involved with reduction of suicide to identify gambling impacts on individuals exhibiting suicidal ideation.**

- Throughout the month of September, agency staff made contact with various crisis centers around the state in order to educate them on the link between suicide and problem gambling. This involved making contact with individuals who perform intake procedures on incoming clients and the professional who subsequently counsel them.
- Plans were made to present and exhibit at the Broward County VA Hospital and the Miami-Dade County VA Hospital for their annual suicide prevention conference in early October. This event centers on suicide among veterans and is organized by the suicide prevention coordinators at the above VA hospitals. Specifics regarding this event will be posted next month.

**#6 The FCCG will work to educate the insurance industry, their providers, and others, of the cost of untreated problem and pathological gambling, and will work to support the development of insurance coverage for gambling specific treatment by certified gambling professionals.**

- In September, the FCCG contacted 15 providers who had previously received FCCG screening tools to utilize with existing clientele, along with materials for display in their waiting rooms. One facility indicated they had already begun the screening process (see Family Impacts Program #2 for specifics).

#### Youth and Young Adult Programs

**#1 The FCCG will participate in at least 3 conferences geared toward school administrators and coaches, which will increase awareness among a population very likely to have direct exposure to students with gambling problems. Materials and resources that can be used to assist this population will be provided and exposure to the HelpLine from this initiative will exceed 750.**

- The FCCG has secured an Exhibit Table at the 86<sup>th</sup> Annual 2009 PTA Convention in November.

Year to date conferences: 1

Year to date exposures: 300

**#2 With gambling beginning in children's lives earlier and earlier, the Council routinely receives gambling related requests for resources from professionals working with elementary school youth. In order to address this need, the FCCG will develop an age appropriate elementary school lesson plan, designed to be utilized in schools as well as in other organizations serving this age group.**

- The FCCG has developed content for the Lesson plans for grades 1<sup>st</sup>-3<sup>rd</sup> and 4<sup>th</sup>-5<sup>th</sup>, and they are currently in the internal review phase. The FCCG will then work with a pre-identified area educator, who has agreed to review with colleagues and furnish professional feedback to aid in the Agency's completion of the plans.

**#3 The FCCG will continue its work with colleges to move forward on integrating gambling into their current health promotion activities and counseling, through utilization of FCCG college specific programs such as the College Workbooks, SAGA and Dire Stakes. Online problem gambling awareness on integration of these resources will be provided for college counselors. In addition, the FCCG will also participate in and provide materials to statewide groups such as FHE-ASAP, student organizations such as Bacchus or Active Minds, peer education groups, IFC, Pan and NPHC groups. Exposure to the HelpLine will exceed 100,000.**

- In September, the FCCG began development of its peer education program for implementation of the SAGA program in colleges across the state. The package being developed will include a brief introductory letter geared toward the peer educators to introduce the program and express the objectives desired by the FCCG, a presentation for them to give to students, which will include info, questions to ask their groups, activities, a self-assessment (and discussion of way to lead it), some optional jeopardy questions, some brief addendums with extra info for special populations (athletes, freshmen), and pre/post tests and evaluations. The FCCG will also offer training to all interested schools on how to best implement on their respective campus.
- In addition, two university health fairs have been identified and secured to take place during the month of November.

Year to date exposures: 925

**#4 The FCCG will continue to partner with the Florida High School Athletic Association to utilize the FCCG's lesson plan developed for high school athletes and to effect policy regarding sports wagering among high school student athletes and coaches.**

- Planning is underway to provide the sports wagering lesson plan to coaches via the FCCG website, at which time, coaches will be provided the link to the lesson plan. The FCCG is also currently developing a power point workshop addressing the specifics of NCAA rules and regulations regarding sports wagering which coaches can request.

Year to date dissemination: 0

**#5 The Youth toolkit includes information designed to educate, instruct and assist parents and teachers on how to prevent problem gambling and provide support to young people who may be experiencing gambling related problems. The FCCG will update the contents of the Youth toolkit, continue to distribute, and make it available online for parents and educators. This will enable users to download selected activities with the option to request additional materials and resources through the FCCG HelpLine. Over 1,000 Floridians will be exposed to the FCCG HelpLine through this initiative.**

- The FCCG continues to provide educators and parent's information regarding gambling among adolescents as the gateway to other at-risk behaviors such as alcohol, tobacco and other drugs. An article addressing problem gambling among adolescents and inviting educators to request a copy of the toolkit was provided to the PTA membership committee for Broward Public Schools, the largest school district in the state. Future requests generated from the article will be reported.

Year to date exposures: 458

## Senior Programs

**#1 The FCCG will continue to provide assistance to Florida's senior population by promoting and distributing the FCCG's *Playing it Safe* education kits and continue to build the peer education program by working with individuals, local and State Agencies or organizations working specifically with the senior population.**

- On September 11, 2009, the FCCG provided senior toolkits and additional senior specific materials to 120 attendees at the Mind Alert event geared toward older adults and mental health professionals.
- Thirteen (13) senior education kits were provided to FCCG partner agencies for training and programming for the partner contract deliverable specifically addressing the Peer Education Program for the senior population.

Year to date Senior Kit distribution: 22

Year to date exposures: 120

**#2 The FCCG will utilize its care giver educational program, which provides caregivers information on the warning signs of problem and compulsive gambling and the inherent risks of developing a problem for seniors. This caregiver educational program will provide caregivers with the information they need to identify a person who is at-risk or demonstrating the signs of developing a problem with gambling or losing control, and it will also provide caregivers and residents information on how to set healthy gambling guidelines.**

- During the month of September, the FCCG reached 156 senior caregivers through dissemination of the FCCG's caregiver educational program.

Year to date distribution: 465

**#3 The FCCG will work with MAGEC (Miami Area Geriatric Education Center), to develop curriculum on problem and compulsive gambling, senior-specific for application and for use by medical school faculty, nursing institutions, clinical geriatric environments, adult day cares, assisted living and retirement facilities and veteran servicing organizations. The curriculum offered will enable users to assess the existence of at-risk, problem and compulsive gambling, as well as co-existence with other difficulties such as substance abuse, mental disorders and significant health problems.**

- Discussions with MAGEC continued throughout September to determine plans for the new curriculum on senior specific problem gambling. Once developed, the curriculum will enable users to assess the existence of at-risk, problem and compulsive gambling as well as co-occurring disorders.

**#4 The FCCG will develop a screening instrument for use within diverse medical and clinical environments to identify older adults in early to latter stages of a gambling disorder.**

- In September, the FCCG continued to develop its content ideas to be included in the screening instrument designed for use within medical and clinical environments. Further development of the screen will remain ongoing in upcoming months.

**#5 The FCCG will formulate a training program module geared towards older adults. This module will include training in preliminary assessment and referrals and will enable medical, mental health, addictions and other health care providers to obtain continuing education credit.**

- Development of ideas for a senior training module continued throughout the month of September. Once complete this module will include PATS training and will also offer CEU's for successful completion.

**#6 As many seniors are at a point in their lives where reading is difficult or impossible, the FCCG will work to provide easier access to its senior program materials by producing them in audio format where possible. This will allow for access to awareness and education on problem gambling for seniors with sight, hearing and reading limitations.**

- The FCCG continued to work with its consultant during the month of September on the development of the audio program for seniors. It is still anticipated that this initiative will be completed in November and disseminated either at that time or later.

#### Family Impacts Program

The efforts outlined below are designed to address these issues and provide resources for individuals experiencing difficulties within their families due to gambling.

**#1 Continue to participate in National Problem Gambling Awareness Week by highlighting issues relating to problem gambling and its impact on the family. PGAW materials will be sent to state agencies, domestic violence shelters, victim advocates, treatment professionals, social service agencies and any other relevant organizations. At least one collateral item will be developed and distributed as a part of PGAW. A general awareness campaign will also be held to increase distribution of HelpLine information to Florida residents through targeted libraries, YMCA's, Boys and Girls Clubs, Area Agencies on Aging and FCCG Partners. The FCCG website will feature information for groups to use related to Problem Gambling Week in Florida. Exposures gained from this program will exceed 7,500.**

- Planning remains ongoing for this event.

Year to date exposures: 0

**#2 The FCCG will continue to work with state agencies, domestic violence shelters and others to provide resources and information with regard to problem and compulsive gambling and its effects on families to over 2,500 individuals. The FCCG will also continue to build upon the need to screen with state and local agencies serving populations impacted by violence.**

- The Family Justice Center of Hillsborough County (FJCHC) will be meeting with the FCCG in early October to discuss collaborative initiatives on this issue of family violence and neglect and the link between problem gambling. The FCCG will supply the FJCHC with screens and materials to disseminate among the different agencies under their scope so that they may begin to implement this into their intake process and refer individuals to the FCCG if gambling was or is an underlying issue for the family problems they are experiencing.
- One other center, the Advanced Psychiatric Group, which deals with family problems such as violence and neglect, has begun screening for gambling problems as well. They are currently treating one individual that screened positive for gambling problems and to date, have screened a total of 25 individuals.
- Also during the month of September, the FCCG disseminated 35 pieces of information relating to problem and compulsive gambling and its effects on families to state and local agencies reaching out to this population.

Year to date exposures: 135

**#3 Develop and distribute an educational video designed to increase awareness of the impact gambling can have on the family. This video will focus on issues of family violence, relationship problems, financial issues, child abuse and neglect. It will highlight the need to screen and the ability to refer individuals for problem gambling help. This approach has the potential for broad use and can be utilized in any forum for providing awareness, education and prevention.**

- The FCCG has completed the process of vendor selection for this project and development of the video script will be in the month of October.

## Legal Program

**#1 In an effort to better gauge and understand the impact of problem gambling on crime in Florida, the FCCG will conduct a pilot crime impact survey to determine the extent of illegal acts related to problem gambling within one major metropolitan area of the state. This survey data can serve to identify those individuals with gambling problems who become involved in crime as a result of their addiction, and can provide opportunities for intervention and diversion, ultimately reducing crime recidivism and costs to the state.**

- The FCCG has been actively communicating with members of two law enforcement entities, each of which have their own internal chains of command that require approval each step of the way. One sheriff's office has declined participation and the Agency is awaiting a decision from the second. Pending the outcome, the FCCG will determine how to best proceed. Thus far, it appears that law enforcement is reluctant to take on any work that is not required, given severe budgetary and staffing cutbacks.

**#2 The FCCG will continue to provide members within the Florida legal and judicial system with education regarding problem and pathological gambling to gain insight and understanding of the role gambling addiction plays in white collar crimes, check and insurance fraud, forgery, and related crimes. The Agency will work to provide additional educational opportunities on gambling related crime.**

- In September, the FCCG was contacted by the Senior Health Services Administrator at Okaloosa Correctional Institution in Crestview, Florida in regards to the FCCG's legal program which they were in receipt of. Upon review of the program, they felt it could prove extremely beneficial to their inmate population and have become the first facility to officially agree to implement in its entirety.

In the legal program booklet, the FCCG provided simple screening questions which the facility will be using during their intake process in order to identify inmates that are experiencing difficulties due to gambling. As data relating to the specifics of these identified individuals is gathered, Okaloosa Correctional Institution will provide the FCCG with this information to further our knowledge about the incarcerated population as it relates to gambling.

The FCCG has also provided the facility with its "Chance for Change" Recovery Workbooks to be utilized as part of a professional counseling program with their onsite Psychologist or as part of the FCCG's Peer Connect Program which takes place via telephone. The FCCG will also be working with their Re-Entry program in effort to identify resources for those individuals that have completed their sentence and are re-entering society.

- Also during the month of September, the FCCG received confirmation from a County Court Judge in Broward County that implementation of the FCCG's screening tools will begin in October. Follow up with this court will remain ongoing in order to identify program outcomes.

Year to date exposures: 200

## Conference's/Trainings

**#1 The FCCG will continue to participate in conferences at the local and state levels as well as other forums serving general, target and underserved populations. Event exposures to FCCG programs and services will exceed 6,000 professionals.**

- Plans are underway to identify conferences that will best meet the goals and objectives of FCCG programs.

Year to date exposures: 1,326

**#2 Offer and conduct Continuing Education Unit (CEU) trainings for nationally certified Compulsive Gambling Counselors, for the Board of Addiction Professionals of Florida (Addictions/Counseling/Prevention/Criminal Justice), Florida Department of Business and Professional Regulation (Clinical Social Work/Marriage and Family Therapy/Mental Health Counseling), the Department of Mental Health Board of Psychology and others as identified and secured.**

- Planning remains ongoing to identify CEU workshops for the fiscal year. The first training will occur in November for the Florida Addictions Institute in Fort Myers.

**Commitment to Certified Minority Business Enterprise (CMBE)**

*The FCCG will continue to make every effort possible to identify and secure CMBE firms for the completion of FCCG contract work in the areas of public relations, promotional materials, printing, graphic design, advertising and office supplies.*

- Payments made to CMBE vendors during the month of September included payment to Advertising Concepts for promotional materials, Trademark Press for printing/production and n-tersections Communications for advertising/outreach.

Total year to date: \$46,533.89