

2007 SBXLI MARKET ANALYSIS & ECONOMIC IMPACT INVESTIGATION

SUPER BOWL HOST COMMITTEE

Sport Management Research Institute, Inc.

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~~Executive Summary~~ **Executive Summary**

Super Bowl XLI, played on February 4th, 2007, was the fourth Super Bowl staged at Dolphin Stadium and the ninth Super Bowl Game held in South Florida. The official kick-off of the Game was 6:27 p.m. Eastern Standard Time. 74,512 people were in attendance as the AFC Champion Indianapolis Colts defeated the NFC Champion Chicago Bears, 29-17. In addition to the SBXLI Game attendees, this year's Super Bowl was host to the following sub-groups (categorically described):

- ✦ **41,501 Out-of-Town Visitors Attending Non-Game Events;**
- ✦ **436,850 Total Non-Game Event Attendees;**
- ✦ **1,618 Out-of-Town Visiting Auxiliary Event Staff/Participants;**
- ✦ **2,394 Out-of-Town Visiting Participating Team Personnel (Colts and Bears immediate family, friends, franchise management, business associates);**
- ✦ **2,480 Out-of-Town Visiting National/International Media.**

The current investigation focused on the following economic impact research directives:

Chart 1

1. direct dollars spent due to the event and events leading up to the Super Bowl XLI Game Weekend, by non-local (from outside the Tri-County area) consumers in the market (hotel, concessions/restaurants, local transportation, entertainment, merchandise, other miscellaneous retail)
 - Event(s) spectators/visitor profiles
 - Sub-Contractors/NFL Teams/Owners/NFL officials, media, and ALL others associated with the event itself
 - Corporate sponsors and invited guests
2. re-spending as a result of the direct expenditures (multiplier effect: business stimulation from introduction of new economic injection into the designated community...i.e. Miami-Dade, Broward and Palm Beach Counties (separate AND combined economic impacts investigated, along with Monroe County subsidiary impacts examined)
3. Demographic and economic profiles of non-local event attendees/consumers
 - how many attend
 - how much they spend
 - where are they spending their money
 - on what do they spend while in attendance
 - where do they come from
 - basic demographics (with a segmented approach to the Hispanic Market)
4. Economic impact spreadsheet showing how much event driven money is injected into the local economy (revenue of sport related entities: hotels, restaurants, transportation, and entertainment)
5. Local corporate spending patterns as a direct result of event-related activities
6. Precise types of local businesses affected by event driven spending
7. Precise number of jobs in all local businesses affected by event driven spending
8. added value of local, regional, national, and international media exposure to the Tri-County region.

To accomplish these objectives the research investigation was comprised of two (2) specific research phases: **primary** (onsite) data collection and **secondary research** efforts.

Primary research investigated consumer profiles of SBXLI Game and auxiliary event attendees, and media in attendance. The data collection protocol called for the SMRI field researcher team to randomly conduct survey execution of visitors and non-visiting event attendees and media. Those spectators and media visiting from outside the South Florida Metropolitan vicinity specifically for Super Bowl XLI and related events were asked to complete the economic impact expenditure, consumer profile and community impact survey instrument. Non-visiting or local residents were surveyed for event attendance, consumer profile and market analysis data. A separate Hispanic market survey was made available to local residents who expressed a preference for a translated version of the survey instrument. Finally, a local business survey was distributed online two weeks following the staging of SBXLI to all local business owners/operators who were listed with the Greater Miami Convention and Visitors Bureau, Greater Ft. Lauderdale Convention and Visitors Bureau and/or currently registered with a Tri-County economic development agency.

Of the sample size of visitors, local residents and media originally tapped for inclusion in the study (N=3000), a total sample size of qualified (usable) instruments (N=433 Visiting Media; N=743 local residents; N=1721 out-of-town visitors surveyed) was extrapolated yielding a final sample size of (N=2897). The SMRI research team was comprised of twenty two research assistant personnel that were specifically trained and experienced in economic impact data collection protocols. The SMRI research team executed data collection at the following SBXLI Game Day/SBXLI auxiliary events and South Florida tourism industry sites: *SBXLI Game Day, Motorola Mile, Super Saturday in the Sand, A Taste of the NFL, Nations in Rhythm, Super Saturday Blast on Biscayne, VolleyPalooza, West Palm Beach International Airport, Hollywood-Ft. Lauderdale International Airport, Miami International Airport, Boca Raton Executive Airport, Ft. Lauderdale Executive Airport, Trump Sonesta Hotel, Miami Airport Hilton, Seminole*

Hard Rock Hotel, Breakers Hotel, Boca Raton Resort and Intercontinental Hotel in Miami.

Secondary research was collected from several source points, including but not limited to the following:

- ❖ Economic Impact Studies conducted at prior Super Bowls (Detroit, Jacksonville, Miami, San Diego, New Orleans);
- ❖ Expenditures from NFC/AFC Teams derived from economic impact worksheets completed post-SBXLI;
- ❖ Expenditures from Corporate Sponsors extrapolated from economic impact worksheets completed post-Event;
- ❖ Hotel occupancy and average daily rates for Super Bowl week (January 30 through February 5th 2007), provided from Smith Travel Research and the respective Convention and Visitor Bureau's for Palm Beach County, Broward County, and Miami-Dade County;
- ❖ Florida Turnpike and the Florida Department of Transportation auditing toll booth operations and revenue collection centers,
- ❖ Tri-County Local Business survey targeting Tourism related businesses post SBXLI Game Events for expenditure patterns leading up to and during SBXLI Game Day Execution (N=521);
- ❖ Local Resident General South Florida population (voting age filter) online survey, monitoring local resident perceptual data regarding the staging and execution of SBXLI Game/Auxiliary Events and subsequent impact on quality of life issues (N=2241);
- ❖ Sub-contractors involved with SBXLI Game and auxiliary event execution, NFC and AFC Team Personnel, NFL Event Management Staff, Security Personnel involved in SBXLI Game Day and auxiliary event execution;
- ❖ Media Audit of broadcast, print, internet media product and the associated media added value associated with said reporting systems.

All primary and secondary data pursuant to economic impact was downloaded into the most recent version of IMPLAN Professional Version 2.0 for Windows and IMPLAN data files (2004 IMPLAN County Files with industry aggregate information on the South Florida Metropolitan geographic vicinities).

2007 Super Bowl XLI Economic Impact Key Research Findings

Key findings derived from top line data analysis of relevant primary and secondary research conducted for the purpose of the SBXLI Economic Impact investigation are provided in the research capsule statements. Data points will be introduced in the order that they appeared on the raw survey instruments provided to all study participants. SBXLI Visitor's surveyed during the SBXLI Game/Auxiliary events will lead the key findings section, followed by local residents attending SBXLI events and surveyed online, visiting media key findings and local business survey key data synopsis.

SBXLI Visitor Key Data Findings

- ❖ 59.4% of visitors surveyed rated South Florida as an “excellent” choice as a site for the Super Bowl, followed by 27.6% who rated the site as “very good.” When asked to compare South Florida as a site for Super Bowl to previous Super Bowl sites, South Florida was ranked “better” than Atlanta by 53.2% visitors surveyed, a “better” site choice than Houston by 54.2%, than Jacksonville by 57.1% and Detroit by 55.8%;
- ❖ 54% of visitors revealed they had a “more favorable” impression of South Florida as a result of their attendance at the SBXLI Game or SBXLI auxiliary events;
- ❖ The average group size for visitors profiled was 2.63;

- ❖ The average number of nights spent in a South Florida accommodation was 5.11;
- ❖ Per person expenditures of Visitors surveyed per diem was \$668.60 on the following expenditure categories: accommodations, meals / beverages, transportation, entertainment / recreation, merchandise / shopping and other (miscellaneous retail);
- ❖ 86.9% of visitors profiled were visiting the South Florida Metropolitan vicinity specifically to attend the SBXLI Game and/or auxiliary events. An additional 4.3% revealed that SBXLI was an “influencer” but not the main reason for their visit and 8.8% surveyed reported that SBXLI had “no impact” on their reason to visit the metropolitan vicinity. This report’s economic impact analysis tapped only those visiting South Florida specifically to attend the Game Day and/or related Super Bowl events. “Casual” visitors were not included in the analysis;
- ❖ The total gate for SBXLI Game Day attendees as Dolphin Stadium was 74,512...of which 70,902 revealed they were visiting the region specifically to attend the Game. An additional 436,850 visitors, residents and casuals attended SBXLI “auxiliary events” of which 41,501 were designated as visitors specifically in South Florida to attend only a SBXLI auxiliary event (e.g. Motorola Mile, NFL Experience) and DID NOT have a SBXLI Game Day ticket. (This analysis included those visitors who attended only one auxiliary SBLXI event, thus avoiding cross-over or replication in the total count). The total number of visitors specifically visiting South Florida to attend the SBLXI Game or to attend auxiliary events was 112,403;
- ❖ 75.6% of visitors traveled to South Florida by air. An additional 11.3% traveled via private car. 5.4% chose private/company air and 4.3% arrived by chartered air;
- ❖ If visitors traveled by air for Super Bowl week, 41.7% arrived in Miami International airport, 37.5% arrived into Hollywood-Ft. Lauderdale International airport, 11.8% flew into Palm Beach International airport and 7.9% arrived into an Executive Airport in South Florida;

- ❖ If visitors indicated they traveled by car, 62.9% indicated they commuted via the Florida Turnpike highway system. An additional 35.7% traveled to South Florida on Interstate 95;
- ❖ 55.1% stayed in a full service hotel accommodation during their trip to South Florida. 20% stayed in a private home, 11.2% chose motel accommodations, 7.5% stayed in a rental accommodation and 4.3% chose another type of accommodation not listed;
- ❖ Other regional destinations traveled to by SBXLI visitors included: 8.2% traveling to Key West, 6.5% Orlando, 5.9% Tampa, 5.4% Naples, 3.7% Bahamas and 2.4% Caribbean destinations;
- ❖ 31.6% visited the official South Florida SBXLI Host Committee website;
- ❖ 8.7 of visitors “blog” as part of their internet usage patterns...top blog sites tapped by visitors: “MySpace”, “Facebook” and nfl.com;
- ❖ Demographically, 71.5% of visitors were male and the average age was 43.4. 42.9% were college educated and 31.9% completed graduate school. Occupationally, 20% classified their career choice as “professional”, 15.9% were “executives”, 10.9% “sales” and 7.8% in “upper management”. The average household income reported by visitors was \$222,318.

SBXLI Local Resident Key Data Findings

- ❖ 86.8% of local residents surveyed who attended SBXLI or SBXLI auxiliary events rated South Florida as an “excellent” site for Super Bowl (87.6% of the Hispanic market and 52% of general population/voting age surveyed online rated the site as “excellent” by comparison);
- ❖ If local residents attended a SBXLI auxiliary event, TV (42%) followed by Newspapers (31.9%) and Radio (26.8%) were the top media avenues tapped for information about the event. Outdoor advertising (21.5%) and the Internet (21.2%) reported very similar usage patterns by residents (NOTE: 59.2% General population surveyed online preferred TV as a medium for SBXLI news);

- ❖ 35.1% non-Hispanic SBXLI local residents, 36.6% Hispanic SBXLI residents and 10% General Population respondents visited the SBXLI Host Committee website;
- ❖ When asked to rate the “economic value” of hosting SBXLI on the local community, 69% non-Hispanic SBXLI residents, 67.8% Hispanic SBXLI residents and 35.4% general population respondents rated SBXLI economic value as “**excellent**” (an additional 37.6% of the general population rated the value as “very good”);
- ❖ When asked to rate the Tourism Value of hosting SBXLI, (74.6%) non-Hispanic SBXLI residents rated the impact as “**excellent**”, 76.6% Hispanic SBXLI rated the impact “excellent”, general population sample, 43.1%;
- ❖ Ratings for “Community Growth and Development” revealed 55.1% SBXLI residents, 54.7% Hispanic SBXLI residents and 24% local population rating the SBXLI Impact as “**excellent**”;
- ❖ 59.4% of SBXLI residents surveyed and 58.9% Hispanic SBXLI residents surveyed revealed they would be interested in volunteering for future Super Bowls;
- ❖ 84.5% of SBXLI residents were full time South Florida residents and 81.8% of SBXLI Hispanic residents were full time SoFlo residents;
- ❖ 13.1% of South Florida SBXLI residents “blog” as part of their internet usage patterns...12.9% SBXLI Hispanic residents “blog”. The most frequently reported “blog” sites for both segments included: “MySpace”; “Facebook”, “YouTube” and nfl.com;
- ❖ Demographically, 62.6% SBXLI non-Hispanic residents were male, 63.3% Hispanic residents were male. The average age of non-Hispanic residents was 37.6; Hispanic, 39 years of age. 46.3% of non-Hispanic residents were college educated, 47.1% of Hispanic residents. 17.4% of residents classified their career path as “professional” contrasted with 14.2% Hispanic. Average HHI for residents, non-Hispanic reported as \$127,010 for Hispanic residents \$113,768 (e.g. average HHI for Broward

County residents reported by the US Census Bureau in 2005 was \$46,673, for Miami-Dade County at \$46,242);

SBXLI Visiting Media Key Data Findings

- ❖ Media surveyed spent, on an average per diem per person, \$483.36 on accommodations, meals / beverages, entertainment / recreation, merchandise / shopping and other miscellaneous retail;
- ❖ Visiting media spent on the average 4.88 nights in the South Florida metropolitan area;
- ❖ Print media devoted on the average 459.07 column inches for Super Bowl Coverage, Broadcast media reported 291.22 minutes on air on average, Internet media indicated on average , 241.9 column inches/space for cyber coverage of SBXLI;
- ❖ 74.9% visiting media traveled to South Florida by commercial air, with 61.8% of that media segment choosing to arrive into MIA (31% arrived in FLL);
- ❖ 72.8% stayed in a full service hotel, followed by the next highest percentage -- 9.3% in a rental property;
- ❖ 46.4% of all media surveyed had a “more favorable impression” of South Florida as a result of their attendance of SBXLI...4% held a “less favorable impression”;
- ❖ 52% rated South Florida as an “excellent” Super Bowl site followed by an additional 40% who rated the site selection as “very good”;
- ❖ 27.8% of the Media tap “blog” sites;
- ❖ 63.7% visited the SBXLI Host Committee website;
- ❖ Media comparisons of scored high “better” marks for South Florida as a Super Bowl site to when compared to Jacksonville, Tampa and Atlanta. Contrasted with those sites receiving the highest percentage response for “same” and/or “worse” when compared to South Florida as a “host site” for Super Bowl were San Diego, Detroit, Houston and New Orleans;

- ❖ Demographically, SBXLI media was 27.8% female with an average age of 37.3.

SBXLI Local Business Impact Key Data Findings

- ❖ 22.6% of local businesses surveyed sold a product directly related to Super Bowl, 77.4% provide a service directly related to Super Bowl;
- ❖ 31.34% of those local establishments surveyed saw an increase in employment during Super Bowl week of 43.2% (when compared to this same business period in 2006) with 61.1% hiring part time staff, 27.8 extending staff hours and 11.1% hiring full time employees to meet demand for services and/or products rendered;
- ❖ 53.7% of business surveyed saw an increase in business activity, on the average of 36.8% during Super Bowl week when compared to this business period in 2006;
- ❖ Local businesses reported an increase in operating costs of 19.8% in preparation for Super Bowl week sales activity;
- ❖ After Super Bowl XLI, 73.8% reported that “sales returned to normal wintertime levels,” 3.3% indicated “higher than normal business activity,” 21.3% revealed that sales “declined” from normal wintertime levels and 1.6% received follow-up business as a direct result of participating in SBXLI business;
- ❖ 27.6% reported the experience in dealing with the SBXLI Host Committee was “excellent,” 29.3% rated the experience “very good” and 20.7% responded the experience was “good”;
- ❖ 38.1% indicated that they DID attend a SBXLI workshop or seminar conducted by the Host Committee.

SBXLI Economic Impact Key Data Findings

- ❖ The direct economic impact from hosting Super Bowl XLI on the designated study area (South Florida Metropolitan Vicinity) was

\$297,800,836. Subsequently, it followed that the indirect spending (business preparation phase) associated with staging SBXLI was \$86,588,711 and the induced (or re-introduction of new monies flowing through the local economy) was \$96,949,851. Finally, the direct, induced, indirect economic injection in the host community from the **staging and execution of SBXLI, otherwise referred to herein as the “total effects” was \$ 463,339,398:**

- ❖ The targeted “total effects” economic impact for Miami-Dade County was **\$219,622,875;**
- ❖ “Total effects” economic impact for Broward County was **\$183,019,062;**
- ❖ “Total effects” economic impact for Palm Beach County was **\$42,163,885;**
- ❖ “Total effects” economic impact for Monroe County was **\$ 1,853,358.**