

***THE ECONOMIC IMPACT OF SPORTS AND
RECREATION ACTIVITIES IN FLORIDA***

Prepared for:

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I. EXECUTIVE SUMMARY

A. Sports are a Key Contributor to Economic Development in Florida

Florida's large and expanding sports and recreation sector is comprised of a number of inter-related industries that provide significant benefits to the statewide economic development effort. Sports and recreation activities contribute to the economic development of Florida in two critical areas: 1) as a generator of economic output, Gross State Product (GSP), labor income, employment and fiscal revenues; and 2) as a provider of externality benefits, such as improving the quality of life of Floridians, providing an attraction for overnight visitors and facilitating the recruitment, retention and expansion of business enterprises.

The attraction of high-value added industries is among the economic goals of the State, and professional, amateur and recreational sports are important elements of quality of life in a community. High quality of life attributes are essential for attracting high-value added workers and industries.

The primary objective of this study is to estimate the economic contributions of this cluster to Florida's economy in terms of macroeconomic output, jobs and income, and public-sector fiscal revenues.

B. Economic Impact of Sports and Recreation Sector is Significant to State's Economy

Sports and recreation activities have a considerable impact on Florida's economy, generating significant revenues for Florida business establishments, supporting many jobs and labor income, and providing important contributions to the State's public-sector revenue base. The aggregate economic impacts of sports and recreation are summarized as follows:

- Sports and recreation activities in Florida have a total economic impact of **\$32 billion** as measured by *economic output*.¹
- Sports and recreation provide support for **434,000 employment positions** in Florida and generate \$12.9 billion in annual labor compensation.
- The sports and recreation cluster contributes nearly **\$20 billion in Gross State Product**² to Florida's economy and produces **\$2.1 billion in revenues to state and local governments**.

¹ Economic output refers to the gross operating revenue of Florida firms and the value of output produced by state and local governments. The value of government output is measured in terms of cost (labor and procurement of goods and services).

² Gross State Product represents the net value of production ("value added") and is a concept analogous to Gross Domestic Product (GDP) at the national level. Gross State Product consists of compensation to labor, compensation to capital (business profits and interest income), and indirect business taxes (mainly sales taxes).

- Nearly \$5.0 billion in profit, interest and rental income results from the economic activity surrounding the sports and recreation cluster.

Table ES.1. Total Economic Impact of Florida’s Sports and Recreation Industry Cluster

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	16,591	15,721	32,312
Employment (full and part-time positions)	276,622	157,377	433,999
Gross State Product (Million 2004 \$)	10,424	9,546	19,970
Labor Income (Million 2004 \$)	7,277	5,611	12,889
Profits, Interest and Rent (Million 2004 \$)	1,958	3,068	5,026
State & Local Government Revenue (Mill. 2004 \$)	NA	NA	2,113

Source: The Washington Economics Group, Inc.

- The economic impact of sports and recreation, moreover, is spread across a broad spectrum of Florida industries.
 - The three industry groups garnering the largest shares of total economic impact are: the *arts, entertainment, and recreation* industry group with approximately 19 percent of the total economic impact; the *accommodation and food service* industry with 17 percent; and *retail trade* with approximately 8 percent of the total impact.
 - The *government* sector accounts for approximately six percent of the economic impact, while *construction and finance and insurance* each account for five percent of the total impact.
 - Forty (40) percent of the economic impact is experienced in the remaining industry sectors of the economy, each of which accounts for less than five percent of the total impact.
- The 434,000 jobs supported by sports and recreation activities are similarly found across a wide range of occupations, from personal services, to office staff and sales, managerial and finance, and production and transport workers.
 - 31 percent of employment supported by sports and recreation are workers that provide *personal services*.
 - *Office and administrative support* and *sales* workers represent 25 percent of the total employment impact.
 - 17 percent of the jobs impact is represented by *managerial and finance* and *business services*.
 - *Production* and *transportation* workers account for 15 percent of the employment impact.

The core elements of the sports and recreation cluster are comprised of a number of distinct components. In preparing the economic impact estimates we separated the cluster into nine components for which there was sufficient data to prepare an economic impact analysis. An economic impact was prepared for each of these components. The components are: consumer spending on sports and recreation apparel and equipment; local government expenditures for parks and recreation; sport fishing (including associated boating), hunting and wildlife-associated recreation; recreational golf and golf courses; professional sports teams; sports associated with pari-mutuel wagering; recreational ownership of horses; sporting events sponsored by Florida's 18 regional sports commissions; and major professional golf and tennis tournaments.³

The important economic impacts of each of the nine components are summarized as follows:

➤ **Consumer spending on sports and recreation apparel and equipment**

Total economic output:	\$2.6 billion
Total employment:	36,600
Total labor income:	\$1.0 billion
Gross State Product:	\$1.8 billion
Total profit, interest and rental income:	\$469 million
Total state and local government revenue:	\$261 million

➤ **Local government parks and recreation**

Total economic output:	\$2.0 billion
Total employment:	1,200
Total labor income:	\$910 million
Gross State Product:	\$1.2 billion
Total profit, interest and rental income:	\$199 million
Total state and local government revenue:	\$85 million

➤ **Fishing, hunting and wildlife-associated recreation**

Total economic output:	\$3.6 billion
Total employment:	52,000
Total labor income:	\$1.4 billion
Gross State Product:	\$2.1 billion
Total profit, interest and rental income:	\$530 million
Total state and local government revenue:	\$253 million

³ It is important to keep in mind that the economic impact of sporting goods sales **associated** with recreational golf, sport fishing and other wilderness recreation, and ownership of horses is estimated within the impact of consumer spending on sports and recreation apparel and equipment.

➤ **Recreational golf and golf courses**

Total economic output:	\$16.8 billion
Total employment:	203,800
Total labor income:	\$6.1 billion
Gross State Product:	\$9.9 billion
Total profit, interest and rental income:	\$2.8 billion
Total state and local government revenue:	\$1.1 billion

➤ **Professional sports teams**

Total economic output:	\$2.1 billion
Total employment:	18,200
Total labor income:	\$1.0 billion
Gross State Product:	\$1.3 billion
Total profit, interest and rental income:	\$193 million
Total state and local government revenue:	\$143 million

➤ **Sports associated with pari-mutuel wagering (horse racing, greyhound racing and jai alai)**

Total economic output:	\$2.5 billion
Total employment:	36,946
Total labor income:	\$1.0 billion
Gross State Product:	\$1.5 billion
Total profit, interest and rental income:	\$387 million
Total state and local government revenue:	\$109 million

➤ **Recreational ownership of horses**

Total economic output:	\$2.1
Total employment:	25,200
Total labor income:	\$764 million
Gross State Product:	\$1.2 billion
Total profit, interest and rental income:	\$337 million
Total state and local government revenue:	\$82 million

➤ **Sports commissions-sponsored events**

Total economic output:	\$668 million
Total employment:	9,700
Total labor income:	\$245 million
Gross State Product:	\$409 million
Total profit, interest and rental income:	\$117 million
Total state and local government revenue:	\$48 million

➤ **Major professional golf and tennis events**

Total economic output:	\$211 million
Total employment:	3,000
Total labor income:	\$78 million
Gross State Product:	\$128 million
Total profit, interest and rental income:	\$37 million
Total state and local government revenue:	\$14 million

II. SPORTS AND ECONOMIC DEVELOPMENT OF FLORIDA: A CONCEPTUAL FRAMEWORK

A. *Recognizing the Contribution of Sports and Recreation to the State's Economy*

Florida's growing and dynamic sports and recreation sector is comprised of a number of inter-related industries and serves as a vital component of statewide economic development. This sector contributes to the economic development of Florida in two critical areas. First, it contributes as a generator of economic output, Gross State Product, labor income, employment and fiscal revenues. These are the quantifiable economic impacts from sports and recreation sector activities. And second, it contributes as a provider of externality benefits that are not as readily quantifiable, such as improving the quality-of-life of Floridians, providing an attraction for overnight visitors, and facilitating the recruitment, retention and expansion of business enterprises.

The broadly defined sports and recreation sector represents a number of associated industries whose benefits transcend traditional economic impact analysis. Traditional impact analysis measures the number of jobs, income and output generated by a given sports activity⁴. Through the construction and development of infrastructure and the development of relationships with the private sector, these activities generate visitor spending, public spending, employment opportunities and tax revenues, stimulating local and regional economic growth and prosperity. These traditional economic impacts of sports and recreation activity are quite significant in Florida, as we will illustrate in Section IV.

Externality benefits resulting from economic activity do not accrue directly to the parties involved in the activity, but rather to the society or economy at large. An externality benefit occurs when the activity from a project, individual, group or institution has a positive impact on the well-being of another. Sports and recreation activities provide a wide range of externality benefits, offering much more to their participants, spectators, and communities beyond economic impacts, leisure and recreation. These benefits may be thought of in the context of supporting the overall business climate present in the State. Sports and recreation are part of the package of amenities that make a location attractive, and the value of those amenities is often reflected in other economic variables. For example, Carlino and Coulson (2004) estimated that the typical NFL franchise generated a significant premium on metropolitan area housing values⁵, and the typical NFL franchise boosted property tax

⁴ Lee, Soonhwan. "A Review of Economic Impact Study on Sport Events," *The Sports Journal*, Vol. 4 No. 2, Spring 2001.

⁵ Carlino, Jerry and Ed Coulson, "Should cities be ready for some football: assessing the social benefits of hosting an NFL team." *Business Review*, Federal Reserve Bank of Philadelphia, 2nd Quarter 2004.

revenues by \$50 million annually.⁶ It has long been recognized that environmental amenities that are likely to be directly correlated with sports and recreational opportunities (e.g., coastal counties and indicators of pleasant weather) have a positive influence on housing values and reduce labor costs to employers.⁷

It has been noted that sports transcend geographic, cultural and political boundaries and, therefore, are important “builders of bridges” between citizens.⁸ Sports contribute toward the pursuit of excellence, the desire to connect to one another, and, thereby, enhance our quality of life and good health. Through sports, individuals learn to volunteer and accept a sense of responsibility for civic society.⁹ Participation in active sports and recreation promotes good health and reduces medical costs as well as medical insurance premiums.

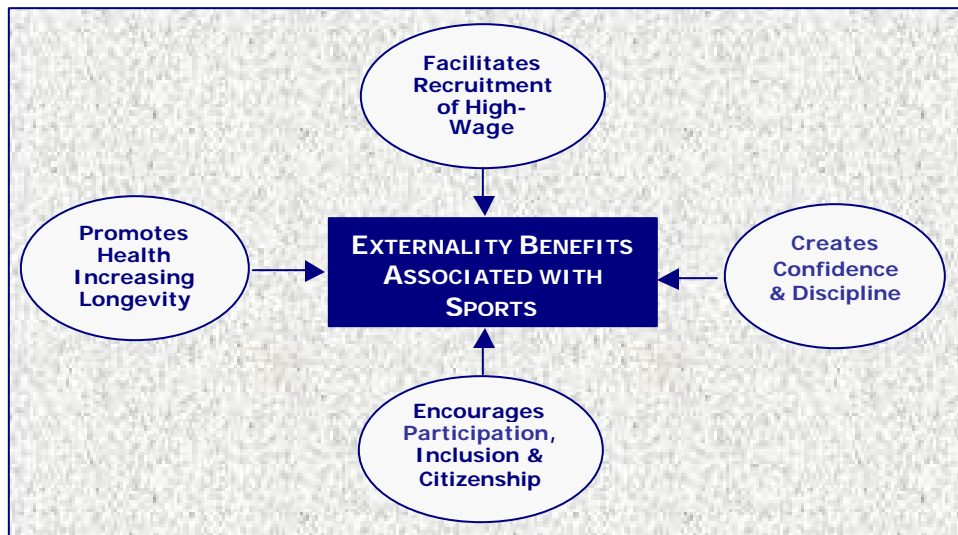


Figure 1
 Source: The Washington Economics Group, Inc.

Sports and recreation are important contributors to individual physical, social, and character development, serving as effective instruments to achieve social, cultural and economic goals that benefit a community. Among the economic goals is the attraction of high-value added industries since professional, amateur and recreational sports are important elements of quality of life in a community, and high quality-of-life attributes are essential for attracting

⁶ Carlino and Coulson also provided estimates of the present discounted value of the estimated property tax revenues resulting from an NFL franchise for a number of cities in Florida: Miami, \$418 million; Tampa \$146 million; and Jacksonville, \$476 million. That is, any public subsidy less than the present discounted value of the estimated tax revenue benefits potentially represented a good financial deal for the community.

⁷ Blomquist, G., M. Berger and J. Hoehn, “New Estimates of Quality of Life in Urban Areas”, *The American Economic Review* (Mar 1988) and J. Gyourko and J. Tracy, “The Structure of Local Public Finance and the Quality of Life,” *Journal of Political Economy* (Aug 1991).

⁸ Karlberg, Lennart. *Speech at the 7th European Conference on the Social Economy* held in Gävle, Sweden, June 2001.

⁹ Canadian Ministry of State, Canadian Heritage. “A Proposed Canadian Sport Policy” http://www.patrimoinecanadien.gc.ca/progs/sc/pol/psc-csp/Sun-doc/6_e.cfm, August 2001.

high value-added workers and industries. Figure 1 depicts some of sports' externality and intangible benefits.

Some of the principal benefits professional sports teams (an industry within Florida's sports sector) bring to a community are intangible and indirect. Communities that are growing into major metropolitan areas tend to have the most to gain in terms of these intangible/indirect benefits. Economic development organizations in Florida counties that have professional sports franchises often utilize them as corporate recruitment tools.

Florida's growing sports sector has evolved into major clusters that magnify the benefits to the State discussed above.

- Clusters in Economic Development

An industry cluster is a critical mass of companies in a particular field and in a particular location, whether it is a country, a state or region, or even a city. Clusters take varying forms depending on their depth and sophistication and include a group of companies, suppliers of specialized inputs, components, services, and firms in related industries¹⁰. Many clusters include trade associations and other collective bodies covering cluster members.

Clusters can increase productivity by improving access to specialized inputs and information, facilitating the participation of cluster members and improving incentives and performance measures. Often, clusters improve the rate and success of innovation and lower barriers to new business formation, enhancing the environment for productivity. Cluster advantages rest on information, transaction costs, incentives, and "public goods" that result from both public and private investment.¹¹ In "the 'New' Microeconomics of Competition," productivity growth is higher in a cluster setting than when related firms are geographically dispersed.

- Linkages with other Industries: The Florida Sports Clusters

The "core" elements of the sports and recreation industry cluster and its relationship to suppliers and to complementary industries are illustrated in Figure 2. This diagram also indicates the various segments of the sports and recreation cluster that were considered in this study. The "backward linkages" indicate the supply-chain relationships between the core elements of the cluster and other industries throughout Florida's economy. The economic impacts that result from backward linkages were identified through the use of an input-output

¹⁰ Porter, Michael. "The Adam Smith Address: Location, Clusters, and the 'New' Microeconomics of Competition," 39th Annual Meeting of the National Association for Business Economics, September 1997.

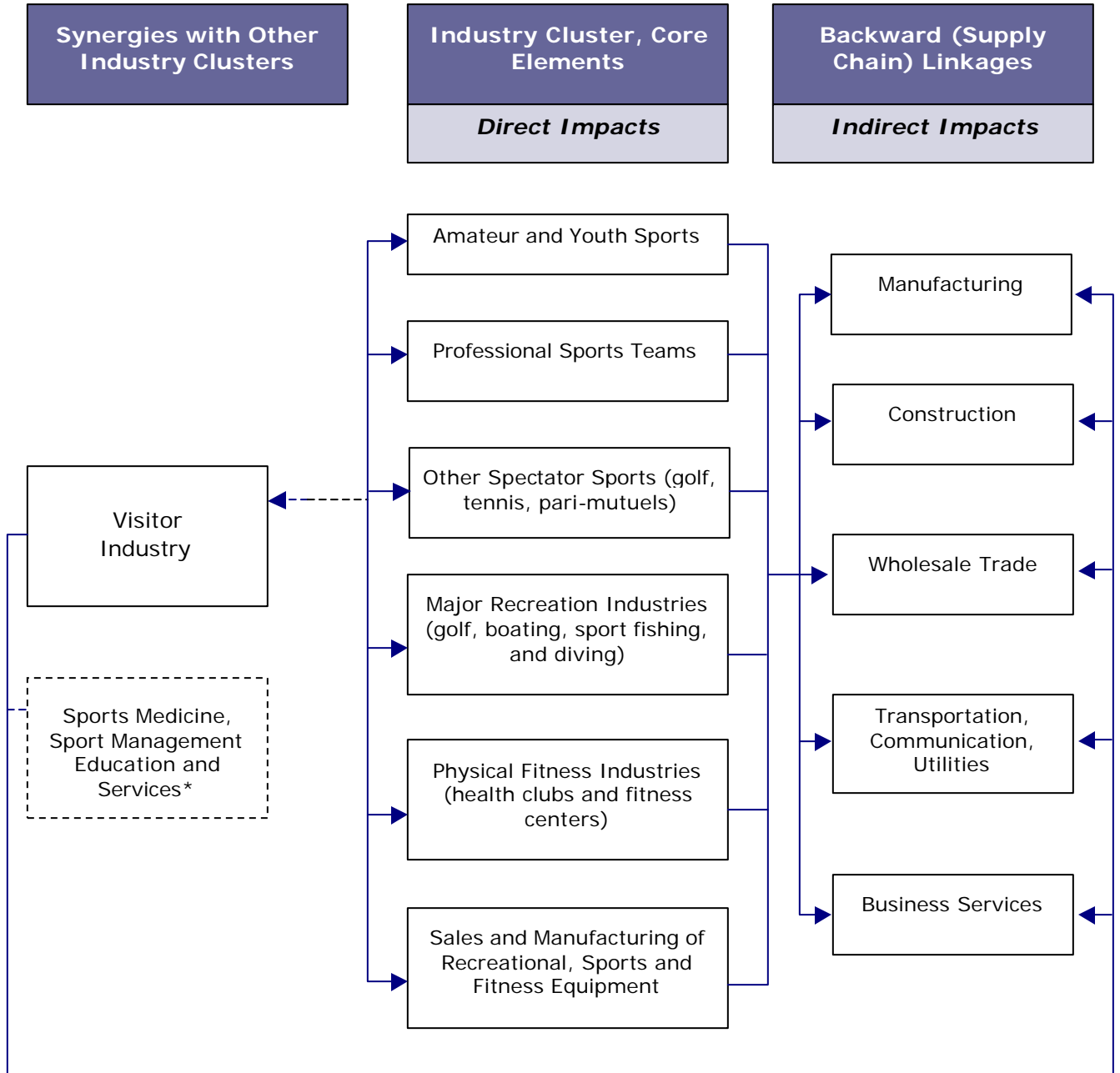
¹¹ Porter, "The Adam Smith Address."

economic model of Florida. The sports and recreation cluster activities are far-reaching, impacting a large number of other industries and thereby facilitating the economic diversification of Florida – a key goal of State government. In addition to the impacts from backward linkages, our model also estimates the additional (induced) economic impacts that result from household spending of wages earned by Florida workers.

Athletes, participants, and spectators of amateur, professional, recreational and fitness sports support the manufacturers of recreational, sports and fitness equipment through direct purchases of those goods and services. These sports and recreation activities require an infrastructure utilizing construction, transportation, communication, manufacturing, wholesale trade and business services to run their associations, organizations, teams, or events. The tourism industry, and its associated suppliers, indirectly benefits from the enhanced ability to attract visitors who seek entertainment and recreation opportunities provided by firms in the sports and recreation cluster.

While there are other industries outside of the tourism sector (sports medicine and educational programs that train workers for sports, exercise, and recreation industries, for example) that are related to the sports and recreation sector through economic synergies, the scope of this study **did not** extend to the economic impacts of complementary business activities beyond those associated with tourism. The additional components of sports medicine and education were excluded from the analysis due to insufficient data.

FLORIDA'S SPORTS AND RECREATION INDUSTRY CLUSTER



*Economic Impacts not estimated in study.

Figure 2

Source: The Washington Economics Group, Inc.

Florida has developed a significant cluster of sports and recreation firms throughout the State. In Florida, the most visible components of the sports sector are:

- Florida’s nine (9) professional sports teams
- Major League Baseball’s Spring Training Season (18 teams)
- Youth and amateur leagues in 44 traditional and non-traditional sports
- Increasing popularity of spectator sports
- International leadership in recreational sports

The growing major recreational and physical fitness industries reflect the State’s value on enhanced quality of life and health and its growing affinity for outdoor activities for all ages. Florida’s various sports associations strengthen the sports and recreation cluster by providing promotional and technical assistance, coordination and/or supervision of events to organizers of sporting events. More than 40 State or national sports-governing organizations and associations have offices located in Florida helping to coordinate sporting events and to promote the State as a location for holding competitions.

B. A Profile of Florida’s Sports and Recreation Cluster

Table 1 presents the top traditional and non-traditional amateur sports in Florida. Amateur sports are growing fast in the State, providing support to Florida’s quality of life and economic activity.

Table 1. Top Amateur Sports in Florida

<i>Traditional</i>	<i>Non - Traditional</i>
Baseball	Bowling
Basketball	Cheerleading
Cycling	Flag Football
Gymnastics	Frisbee
Soccer	Golf
Softball	Inline Hockey
Swimming	Martial Arts
Tennis	Triathlon
Track & Field	Water Skiing
Wrestling	

Source: The Washington Economics Group, Inc.

Florida enjoys a comparative advantage in most sports activities. Its 1,350 miles of coastline¹², enviable, subtropical climate and abundant green areas serve as the ideal setting for participants and spectators to enjoy a variety of sports activities year-round. The Sunshine State’s extensive mix of professional, amateur and recreational sporting activities makes it

¹² Awesome Florida. *Florida Facts*, <http://www.awesomeflorida.com/faqs.htm>.

the leader in sports destinations worldwide¹³. Figure 3 highlights the main categories of the sports and recreation industry of Florida.

Components of Florida's Sports and Recreation Cluster

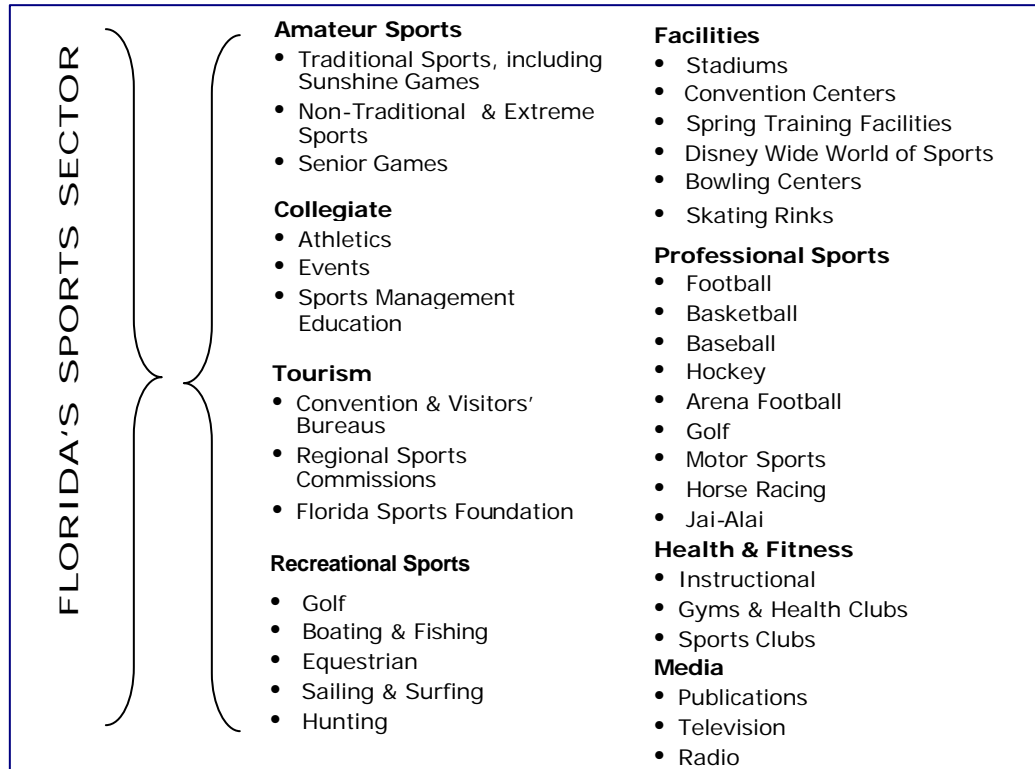


Figure 3
Source: The Washington Economics Group, Inc.

Federal and State governments have set aside many areas in Florida for recreation and conservation. The entire State is oriented toward the numerous forms of sports and recreation available. Florida's 110 State parks include facilities for water sports and other recreational activities. Among the most popular water sports are swimming, boating, water-skiing and fishing. Other popular outdoor diversions include football, baseball, golf and tennis.

Competitive advantages have kept Florida's sports and recreation sector diverse and growing. The following are among the sector's key competitive advantages:

- Extensive experience hosting nationally and internationally renowned sporting events.
- Exceptional representation in high-profile professional sports franchises.
- Preferred worldwide destination for playing and training in several outdoor sports, specifically golf, baseball, tennis, boating and fishing.

¹³ Florida Sports Foundation website, www.flasports.com.

- Versatile and modern sporting facilities.
- A critical mass of headquarters of numerous amateur sports' governing bodies and organizations.

The Sunshine State can boast the successful coordination of a large number of special sporting events at both the national and international level. Some of these large-scale events occur on an ongoing, annual basis. Due to its past experience as host of major events, Florida will continue to attract and be the preferred destination for hosting many sporting events.

Florida's professional sports teams have flourished in the State, bringing winning seasons to their fans and several championship playoff appearances. The latter are important not only as sources of social cohesion, but also because they generate large numbers of overnight visitors and increase tourism spending. Recent notable accomplishments include the Tampa Bay Lightning's 2004 Stanley Cup Championship, the Florida Marlins' two World Series Championships (1997 and 2003), and the Tampa Bay Buccaneers win in Super Bowl XXVII. When Major League Baseball's Spring Training opened in March 2005, Florida posted record sales in venues throughout the State¹⁴. To make the best use of its sporting venues, owners and operators across the State created facilities for optimal, multi-purpose use.

Florida is also host to a large number of sports-governing organizations and trade associations. Clearwater, Florida, competes with Colorado Springs, Colorado and Indianapolis, Indiana, as a preferred location for headquarters of national and international governing organizations.

Participation in sports and recreation is an important activity for many of Florida's out-of-state visitors. In response to a question on visitors' primary activities, over eight percent of domestic visitors to Florida reported that participation in outdoor recreation, water sports, or boating was one of their primary activities. Golf was a primary activity for 4.7 percent of domestic visitors. The same percentage of domestic visitors reported "attending a sports event" as a primary activity. (See

Table 2. Sports and Recreation-Related Activities of Florida Visitors, 2003

	<i>Percent</i>	<i>Number</i>
Domestic Visitors ¹		
Outdoor Recreation	8.30%	5,843,000
Water Sports/Boating	8.10%	5,702,000
Golf	4.70%	3,309,000
Attend Sports Event	4.70%	3,309,000
Overseas Visitors ²		
Outdoor Recreation	3.90%	164,000
Golf or Tennis	9.30%	391,000
Attend Sports Event	4.30%	181,000

Notes:

1. Travel Industry Association, Travel Scope as reported by Visit FLA. Multiple responses allowed. Estimated number includes Canadians.
2. **Source:** U.S. Dept. of Commerce, Int'l Tourism Administration as reported by Visit FLA. Multiple responses allowed.

¹⁴ National Public Radio, Morning Edition. "Baseball Spring Training Camps Open," www.npr.org, 5 March 2005.

Table 2.) Visitors to Florida from overseas indicated in another survey that sports and recreation were important primary activities during their visit with significant frequency (see Table 2).

C. The Role of Sports in Florida's Statewide Economic Development Plan

Sporting events have a positive impact on a community, improving quality of life for residents, increasing visitor-related spending and the potential for residual “billboard” effects. Following are some highlights from research by the Travel Industry Association of America on the impact of sports on travel¹⁵:

- Forty (40) percent of all adult travelers in the U.S. travel for a sporting event – 84 percent are spectators.
- Approximately one half of adults traveling for a sporting event do so to attend amateur sports, and half are traveling to attend professional sports.
- The South is the largest census region cited as the destination for sports-related trips.
- Baseball and softball rank highest among sporting events, followed by football, basketball, auto racing, golf, skiing, soccer, and hockey.
- Among those who travel to attend a sports event, 25 percent travel to watch a child's sporting event rather than adult events.
- Sporting events are the 10th-highest travel activity accounting for 6 percent of all travel.

The profile of the typical sports tourist shows that he/she is high spending, enjoys new sporting experiences, and often stimulates other tourism.¹⁶ As such, sports tourism is a multi-billion dollar business, one of the fastest growing areas of the global travel and tourism industry. The economies of tourism-sensitive cities and regions around the world are increasingly more reliant on the visiting golfer or traveling fans. **In some locations, sports can account for as much as 25 percent of all tourism receipts.**¹⁷

Florida has created an economic engine that leads to positive net benefits to residents by establishing a series of ongoing sporting events throughout the State combined with a sports marketing initiative. Multiple NFL Super Bowls, college football bowl games, Major League Baseball Spring Training, and a host of smaller events represent a growing percentage of the overall ongoing revenue from the sports industry within Florida.

¹⁵ Travel Industry Association, *Travel Scope*, 1999.

¹⁶ “The Business of Sport Tourism,” http://www.sportbusiness.com/reports/sport_tourism.adp, October 2004.

¹⁷ Ditto

Sports and recreation can be an economic development tool when leveraged to function effectively as an export industry – that is, providing services to visitors. The sports traveler arrives at an event as a consumer and brings new spending into the economy from outside the region, purchasing locally produced goods and services (e.g., food and lodging) associated with the sports or recreation event. The economic benefits of these expenditures spread to suppliers linked to the tourism sector and generate additional taxes and payroll in the community.

- Florida’s Strategic Plan for Economic Development, 2004-2009: Sports-Sector Role

The goal of Florida’s strategic plan is to develop key priorities to diversify the State’s economy for global competitiveness. The *Roadmap to Florida’s Future* has the following vision and goals:

- Vision: Florida is a global leader in knowledge-based jobs, leading-edge technology and competitive enterprises in the XXI Century.
- Goals:
 - Globally competitive businesses
 - Well-paying jobs for Floridians
 - High quality of life throughout Florida

The priorities outlined by the State of Florida to meet its economic development goals are:

- Focusing on quality of economic growth with value-added job growth, innovation and globalization.
- Ensuring strength in multiple industry clusters and world markets for economic immunity to business cycles and off-shoring trends.
- Integrating education, workforce, infrastructure, quality of life and smart growth as integral elements to diversify Florida’s economy.

Table 3 highlights how the sports sector is an asset for Florida and facilitates meeting the vision and goals of the statewide strategic plan.

Table 3. Role of Sports in Florida’s Statewide Economic Development Plan

<i>Strategic Plan Initiative</i>	<i>Sports-Sector Contribution</i>
Integrate creative community assets including arts, culture...film and <i>entertainment</i> as elements in economic diversification efforts	Exploits the numerous <i>multi-purpose sports facilities and venues</i> across the State to improve quality of life/livable “communities”
Establish a consistent and dependable source of funding for economic diversification at a competitive level...key business incentive programs, and pro-active and effective branding and marketing campaigns	<p>Florida Sports Foundation and 18 regional sports commissions successfully procure and market <i>additional sporting events, organizations, athletes and spectators</i> to the State</p> <p><i>Amateur sports associations and governing bodies</i> in Florida are active non-profit organizations in the State with employee base and physical assets</p> <p><i>Professional sports teams</i> in Florida are well-organized businesses with significant physical assets, employee base, and consistent efforts dedicated to branding and marketing campaigns</p>
Maintain Florida’s existing base in <i>tourism</i> , trade, agriculture, <i>retirement, manufacturing</i> , space and defense.	<p>Florida Sports cluster is a key component of existing economic base of Florida, based on the comparative advantage of the State. The cluster contributes to the tourism industry of Florida, and is an “exporter” of State services.</p> <p><i>Florida Senior Games</i> enhance quality of life for active retirees</p> <p><i>Sporting and athletic goods manufacturers</i> are present in the State, including headquarters of <i>Sporting Goods Manufacturing Association</i></p>

The Florida sports sector contributes to the State’s economic diversification efforts by directly and indirectly generating revenues to businesses across a broad spectrum of industries. As sports activities and participation continue to grow at the national and international level, Florida sporting goods manufacturers also expand the State’s existing manufacturing base. As a popular leisure and residential destination for senior citizens, Florida has several opportunities for this demographic group to continue an active and competitive lifestyle. Its Senior Games, which are held in various communities throughout the State, are one of many options. Sporting events are held in various multi-purpose facilities and venues, causing the sector to prosper by utilizing a community’s assets most efficiently. Efforts by the Florida Sports Foundation and the numerous regional sports commissions bring amateur, recreational, and professional sporting events, small and large, to the State on a continuous basis – in essence, producing significant quantifiable and intangible benefits to Florida.

III. METHODOLOGY FOR ESTIMATING QUANTIFIABLE ECONOMIC IMPACT OF SPORTS AND RECREATION ACTIVITIES

The primary objective of this study is to estimate the direct, indirect and induced economic impacts of the *sports and recreation industry cluster* in Florida using professionally accepted methodologies for economic impact analyses – 2004 is the benchmark year for this analysis. The diverse nature of the sports and recreation cluster leads to significant methodological challenges, however. The data on direct spending for many of the smaller segments of the sector, or information that could lead to reasonable estimates of direct spending, is not available, and, thus, some of the smaller segments could not be included in the study. Sports and recreation spending in the various components of the industry cluster often overlap, and it is necessary, therefore, to take measures that avoid “double counting” of economic impacts.

Where appropriate, it is also necessary to consider the potential for a shift in expenditures from one type of local spending to another in order to measure net economic impacts as opposed to gross impacts. Expenditure shifts or “substitution effects” are more likely to occur within broad categories of sports and recreation activity than between broad categories. For example, the absence of the professional hockey season may result in higher attendance at amateur hockey events or professional basketball events (since their seasons overlap). It is less likely, however, that the absence of all professional sports within the State would shift expenditures to a completely different type of consumer service or product that is produced within the State.¹⁸

A significant proportion of the net economic impact of sports originates from spending by out-of-town visitors and the complementary relationship between tourism and the sports and recreation industry. Only the impacts from sports and recreation-related tourism that may be reasonably attributed to the availability of sports and recreational opportunities in the State were included as part of the study.

The economic impacts of nine broad components of Florida’s sports and recreation sector were measured separately. The components are: consumer spending on sports and recreation apparel and equipment; local government expenditures for parks and recreation; sport fishing (including associated boating), hunting and wildlife-associated recreation; recreational golf and golf courses; professional sports teams; sports associated with pari-mutuel wagering;

¹⁸ Sports fans, for example, may well decide to take trips outside the State to attend live sporting events, rather than spend more money at restaurants or going to the movies.

recreational ownership of horses; sporting events sponsored by Florida's 18 regional sports commissions; and major professional golf and tennis tournaments. Tourism expenditures associated with each of the nine components were included in the economic impact of each of these components separately, rather than on their own as sports tourism.

The direct expenditures associated with each of the broad sports and recreation sector components lead to increases in production, income and employment throughout the State's economy. These positive economic impacts are estimated with an economic input-output model constructed specifically for the State of Florida. Our model was constructed using IMPLAN economic modeling software and data. The methodology and software used to estimate the regional economic impacts have been employed extensively by regional economists and policymakers for over 20 years.¹⁹

Input-output models explicitly consider the inter-industry (or supply chain) linkages that characterize an economy. As a firm or industry experiences an increase in the demand for its product or services, it needs to purchase goods and services from its suppliers. Some of those supplies will be purchased from other firms within Florida's economy. These suppliers will, in turn, need goods and services from other firms. The effect on regional production resulting from successive rounds of inter-industry linkages is called the *indirect effect*.²⁰ It is important to note that the indirect economic impacts are based only on those inter-firm purchases made within Florida, and, therefore, the estimated impacts recognize that firms will also purchase goods and services from outside of Florida. Only those purchases from Florida firms create positive economic impacts.

Increases in production within Florida also lead to expansions in employment and labor income, and the increases in labor income lead to increases in consumer spending, further expanding sales and production throughout the State. The impact from consumer spending by workers on products/service produced in Florida is referred to as the *induced effect*.

The successive waves of production, spending and more production result in *economic multiplier effects*, where the final increase in Florida production, income and employment is larger than the initial (or *direct*) increase in State production, income and employment. Therefore, the *total economic impact* is the sum of the *direct*, *indirect* and *induced* effects.

¹⁹ Many federal, state and local government economists (including in Florida) use this technique to estimate economic impacts and specifically use "IMPLAN models". More information on IMPLAN may be found at www.implan.com.

²⁰ When consumers, for example, purchase a car they are *indirectly* purchasing steel, glass plastics, electronics, etc.

The Minnesota IMPLAN Group, Inc. (MIG) provides the software and basic data needed to construct the economic multiplier model used in this study.²¹ IMPLAN models are based on the most recent U.S. input-output table and income and employment data for regional areas from the U.S. Department of Commerce, Bureau of Economic Analysis.

The economic impacts resulting from the various components of the sports and recreation industry cluster are each considered separately, as each type of spending has its own set of multiplier impacts.

Structure of the Economic Input-Output Model

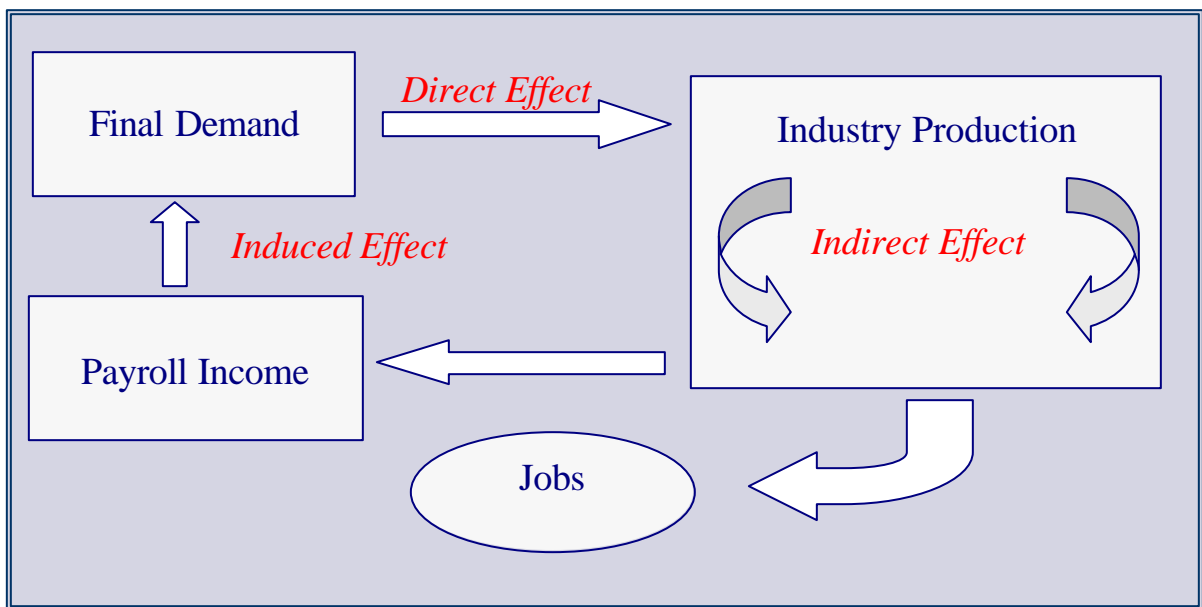


Figure 4
Source: The Washington Economics Group, Inc.

²¹ MIG has been providing regional multiplier models for regional economic impact analysis since 1985.

IV. THE ECONOMIC IMPACT ESTIMATES: SPORTS AND RECREATION ARE A TOP CONTRIBUTOR TO THE ECONOMY OF FLORIDA

- Aggregate Economic Impact of Sports and Recreation in Florida

The sports and recreation industry cluster was separated into nine broad sub-sector categories, and an economic impact analysis was performed for each of those sub-sectors. Sports and recreation activities have a considerable impact on Florida’s economy when all of the sub-sectors are considered together. (See Table 4.)

Table 4. Economic Impact of Sports and Recreation Activities in Florida (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	16,591	15,721	32,312
Employment (full and part-time positions)	276,622	157,377	433,999
Gross State Product (Million 2004 \$)	10,424	9,546	19,970
Labor Income (Million 2004 \$)	7,277	5,611	12,889
Profits, Interest and Rent (Million 2004 \$)	1,958	3,068	5,026
State & Local Government Revenue (Mill. 2004 \$)	NA	NA	2,113

Source: The Washington Economics Group, Inc.

Sports and recreation activities in Florida have a total economic impact of \$32 billion as measured by *economic output*. This makes the sector a significant contributor to the State’s economy. Economic output refers to the gross operating revenue of Florida firms and the value of output produced by state and local governments.²² Approximately one half of this economic impact is in the form of direct expenditures, and the rest is the result of the indirect and induced economic effects. Approximately 19 percent of the total economic impact occurs in the *arts, entertainment and recreation* NAICS industry grouping, as the direct economic impacts are concentrated in these industries.²³ The remaining share of economic impacts is widely distributed among a number of industries. The *accommodation and food services* industry group accounts for 17 percent of the total economic impact, reflecting the mutually supportive links between sports/recreation and tourism. Output in *retail trade* accounts for 8.3 percent of the total economic impact, followed by *government* (6.4 percent), *construction* (5.2 percent) and *finance and insurance* (4.9 percent).²⁴

²² The value of government output is measured in terms of cost (labor and procurement of goods and services).

²³ NAICS refers to the North American Industrial Classification System used by the U.S. Department of Commerce and other government statistical agencies.

²⁴ Greater industry detail is provided in Table A.1 in the Appendix section of this study.

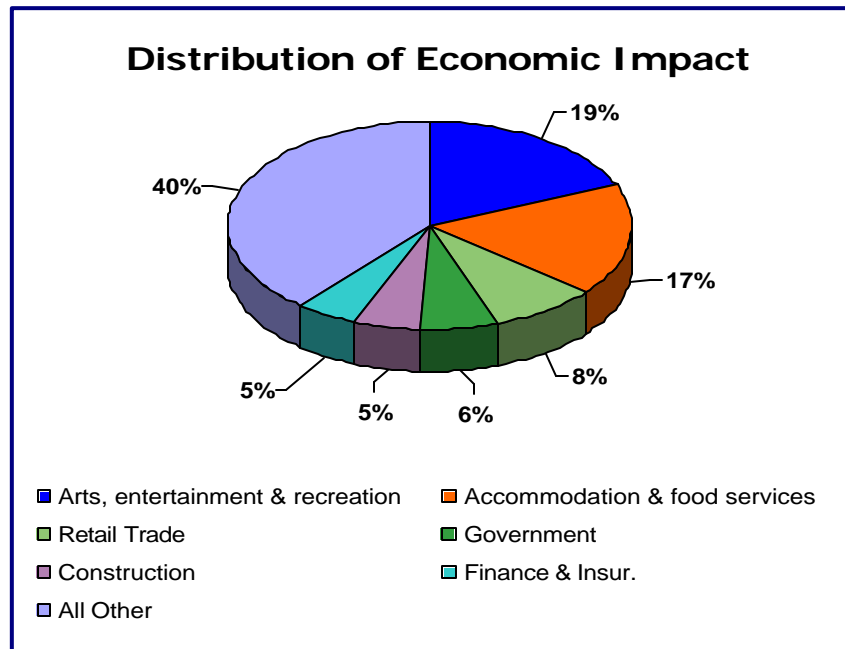


Figure 5

The sports and recreation industry cluster also provides employment opportunities (full-time and part-time positions) for 434,000 workers.²⁵ These job opportunities are created in a wide variety of occupations, and, therefore, accessible to Florida workers with a diversity of skill levels. (See Table 5.)

Table 5. Distribution of Employment Impact by Occupation

<i>Occupation</i>	<i>Jobs</i>
Protective Services	6,065
Education and Social Services	6,116
Professional and Science	10,732
Healthcare	13,059
Farming	16,115
Transportation	22,803
Managerial and Finance	31,785
Production Workers	41,208
Business Services	42,367
Sales	51,294
Office and Administrative Support	57,877
Personal Services	134,579
Total	433,999

Source: The Washington Economics Group, Inc.

²⁵ According to the U.S. Department of Commerce, Bureau of Economic Analysis, Florida had an average annual employment (full and part-time workers, including sole proprietors) of 9.35 million in 2003.

Sports and recreation activity in Florida also supported a total of \$20 billion in Gross State Product (GSP).²⁶ The impact on GSP is distributed across a broad spectrum of industries in a pattern similar to the distribution of gross economic output. The estimated impact on GSP by broad industry groups is provided in Table A.3 in the Appendix.

Gross regional product is an important economic indicator because (after deducting for indirect business taxes) it represents the total income that is available for distribution between labor earnings and financial returns to capital. The sports and recreation industry cluster generated \$13 billion in compensation (including fringe benefits and employer contributions to social insurance) to workers and \$5 billion in capital income, according to our analysis.

The sports and recreation industry cluster also generates (both directly and indirectly) \$2 billion in state and local government revenues. Approximately 43 percent of this sum originates from sales taxes, with an additional 10 percent from other indirect business taxes. Approximately one-third of the estimated state and local revenues are generated through taxes on property.

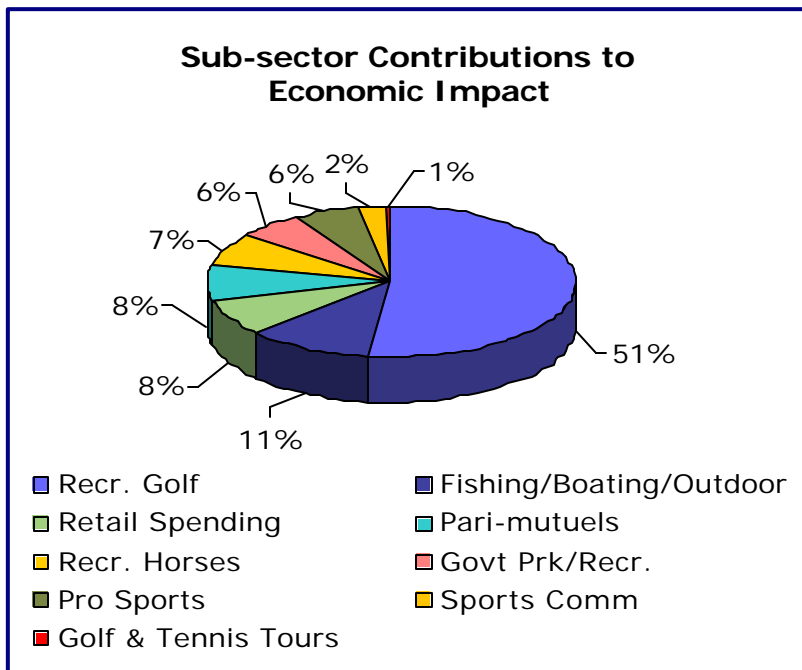


Figure 6

Each of the nine broad sub-sectors of the sports and recreation cluster that we have identified makes an important contribution to the overall economic impact, although recreational golf and fishing, hunting and outdoor recreation associated with wild-life account for two-thirds of the total impact. The economic contribution from each of those sub-sectors is summarized in the following sections, and tables showing the impact of each of the sub-sectors by industry grouping are provided in the Appendix.

²⁶ Gross State Product (GSP) represents the net value of production (“value added”) and is a concept analogous to Gross Domestic Product (GDP) at the national level. Gross State Product consists of compensation to labor, compensation to capital (business profits and interest income), and indirect business taxes (mainly sales taxes).

- Economic Impact of Retail Spending on Sports and Recreation Apparel and Equipment

The National Sporting Goods Association (NSGA) reported that Americans spent approximately 0.5 percent of their personal income on sports apparel, footwear and equipment in 2003.²⁷ This estimate is based on a survey of 100,000 U.S. households and adjusted to reflect the actual distribution of American households reported by the U.S. Census. The total amount of estimated national spending on sports clothing, footwear and equipment was estimated at \$47.4 billion in 2003 and \$48.9 billion in 2004. NSGA anticipates sporting goods sales to reach \$50 billion in 2005.

Spending on sports apparel represents roughly 21 percent of total sports and recreation retail spending, while estimated purchases of footwear account for 31 percent of total spending. Equipment purchases (sporting goods as well as fitness equipment) account for the remaining 48 percent.

We used the same ratio of sporting goods sales to personal income at the national level (0.5 percent) to estimate sporting goods sales in Florida. In 2004, Florida's personal income was estimated at \$547.2 billion, and, therefore, an estimated sporting goods sales of approximately \$2.7 billion. The allocation of estimated total sporting goods sales to the three broad components was based on the national data.

The estimates of sporting goods sales in Florida for each product category were then broken down into retail, wholesale and transportation margins and manufacturer's revenues. Only the proportion of the "trade margins" and the manufacturer's sales revenue likely to accrue to Florida business establishments was used to estimate the economic impacts in Florida. The shares of direct spending accruing to Florida businesses (also called "regional purchase coefficients") were determined through an econometric (statistical) estimation procedure employed in IMPLAN models. Although we estimated \$2.7 billion in retail purchases within Florida, the direct economic impact from those purchases was estimated at \$1.4 billion, after accounting for revenues likely to accrue to business establishments outside of Florida.

The economic impacts of the direct spending associated with retail sporting goods sales in Florida were then estimated using our Florida IMPLAN model. The results of the economic impact simulation are summarized in Table 6, while the economic impacts by major industry grouping are presented in Tables A.7 to A.12 in the Appendix.

²⁷ "The Sporting Goods Market 2005" available at www.nsga.org.

Table 6. Economic Impact of Consumer Spending on Sports/Recreation Apparel and Equipment (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	1,392	1,214	2,606
Employment (full and part-time positions)	24,461	12,120	36,581
Gross State Product (Million 2004 \$)	1,026	741	1,767
Labor Income (Million 2004 \$)	593	439	1,032
Profits, Interest and Rent (Million 2004 \$)	232	237	469
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	261

Source: The Washington Economics Group, Inc.

Sporting goods sales in Florida are projected to have an economic impact of \$2.6 billion in terms of total economic output, and support 36,600 full and part-time employment positions. Florida workers earn just over \$1.0 billion in labor compensation (either directly or indirectly) from sporting goods sales. Florida’s Gross State Product is enhanced by \$1.8 billion as a result of sporting goods sales, while state and local government revenues of \$261 million are supported from sales of sporting goods in Florida.

- The Economic Impact of Local Government Spending on Parks and Recreation

Florida’s county and municipal governments provide the maintenance and infrastructure to support recreational opportunities for State residents and out-of-state visitors. The typical county in Florida allocated \$4 million to operating expenditures for their parks and recreation departments in 2004, while the typical municipality allocated \$1.8 million to parks and recreation.²⁸ The typical county also spent \$1.2 million on capital improvements for projects classified under parks and recreation, while capital improvement spending by the typical municipality was \$203,000 in 2004.

Direct spending by county and municipal governments on parks and recreation was estimated at \$942 million in 2004. An allowance was made for spending on items not related to parks and recreation, but in some cases managed through the parks and recreation departments. For example, some counties and municipalities account for spending on public libraries in the parks department.²⁹

²⁸ Beeler, Cheryl, “2004 Budget and Directors’ Salary Study of Florida’s Municipal and County Parks and Recreation Departments,” Florida State University, Recreation and Leisure Services Administration Program, July 2004.

²⁹ Approximately 40 percent of the survey respondents reported that the parks department also provided maintenance service for public buildings, and 20 percent provided maintenance services for rights-of-ways.

Table 7. Economic Impact of Local Government Parks and Recreation Expenditures (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	942	1,013	1,954
Employment (full and part-time positions)	20,396	10,775	31,171
Gross State Product (Million 2004 \$)	557	628	1,185
Labor Income (Million 2004 \$)	535	376	910
Profits, Interest and Rent (Million 2004 \$)	7	192	199
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	85

Source: The Washington Economics Group, Inc.

Table 7 presents a summary of the economic impacts associated with spending by local governments on parks and recreation, and the detail is shown in Tables A.13 to A.18 in the Appendix. The total economic impact associated with these activities is estimated at nearly \$2 billion in 2004, providing employment opportunities for approximately 31,200 workers. The contribution to Gross State Product is estimated at nearly \$1.2 billion. Public expenditures on local parks and recreation generated \$910 million of labor compensation, while the indirect and induced economic impacts supported \$85 million of state and local government revenue. (The economic contribution of state and national parks is estimated separately in the next section.)

- The Economic Impact of Fishing, Hunting and Wildlife-Associated Recreation

A U.S. Fish and Wildlife survey in 2001 found that 4.9 million Florida residents and visitors over the age of 15 fished, hunted or engaged in wildlife-associated recreation activities.³⁰ Approximately two-thirds of the participants represented Florida residents, and the remaining one-third were visitors. In light of the growth in Florida's population and out-of-state visitors since 2001, the number of participants in 2004 was likely to be 7 to 8 percent higher than in 2001.

The 2001 survey found that residents and visitors participating in fishing, hunting or wildlife-associated recreation spent just over \$6 billion on trip-related spending (\$2.89 billion), equipment (\$2.86 billion) and other miscellaneous items (\$300 million).³¹ We estimate that by 2004 these expenditures grew to \$6.96 billion as a result of population growth, tourism growth and price inflation. (Not all of those expenditures, however, represented purchases of goods and services **produced** in Florida.)

³⁰2001 National Survey of Fishing, Hunting and Wildlife-Associated Recreation: Florida, U.S. Fish and Wildlife Service, U.S. Dept. of the Interior, 2003 (FW/01-FL-Rev).

³¹ Boating expenditures (both operating and equipment) associated with fishing are included in the expenditure estimates.

Nearly one half of total expenditures associated with fishing, hunting or wildlife viewing represent purchases of sports equipment, including boats and motor vehicles. (See Figure 7.) Twenty (20) percent of the total is spent, however, on food and lodging directly associated with fishing, hunting, or wildlife-associated trips. Transportation accounts for approximately 10 percent of these expenditures, while 18 percent is spent on other trip-related items (e.g., bait and tackle, marina expenses, boat rentals, fishing or hunting guides).

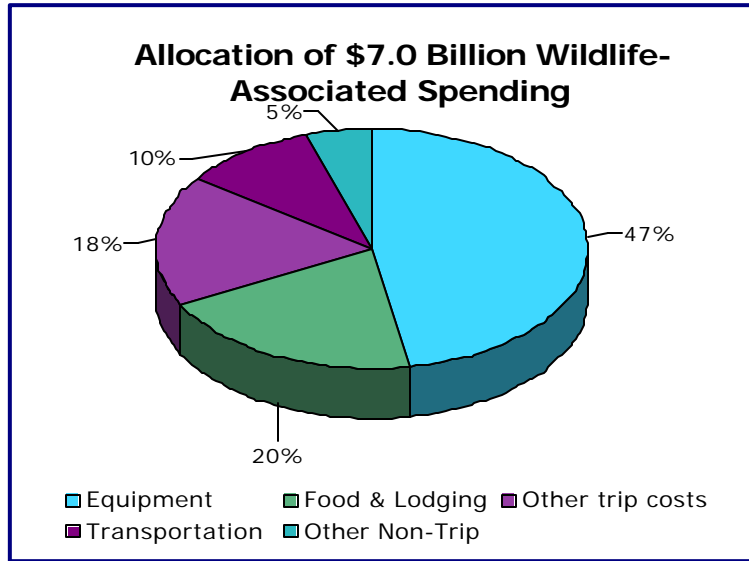


Figure 7

In estimating the economic impact of fishing, hunting and wildlife-associated recreation we need to be sure not to double count the impact of sporting goods sales that were already considered earlier (Table 6) and to remove reported equipment purchases made by non-residents, as these expenditures were mostly outside the State.³² The equipment purchases by residents were already accounted for in the economic impacts presented in Table 6, leaving gross expenditures of \$3.7 billion to be considered in determining the economic impacts in this section. With respect to trip-related transportation expenditures, we considered only half of air transport spending, and, thereby made an allowance for purchases of services from air carriers with business operations located outside the State. For the remaining expenditures (miscellaneous retail and marina services) we considered only the trade margins. The economic impact from the operations of government-owned marinas has already been included in the previous section, and the estimates are shown in Table 7.

After making the aforementioned adjustments, direct expenditures from fishing, hunting and other wildlife-associated recreation were estimated at \$1.85 billion in 2004. Nearly one-half of these expenditures were directed at hotel and lodging business establishments, while 25 percent was directed toward food service businesses. The remaining direct expenditures were in miscellaneous retail, marinas, air transportation, and fuel. Fishing and boating accounted for two-thirds of the total direct spending, and wildlife-watching activities represented nearly 30 percent of total direct spending.

³² Equipment purchases by non-resident sportsmen were estimated at \$1.1 billion in 2004.

Table 8. Economic Impact of Sport Fishing, Hunting and Wildlife-Associated Recreation (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	1,850	1,740	3,590
Employment (full and part-time positions)	35,075	16,877	51,952
Gross State Product (Million 2004 \$)	1,086	1,051	2,138
Labor Income (Million 2004 \$)	750	607	1,357
Profits, Interest and Rent (Million 2004 \$)	184	346	530
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	253

Source: The Washington Economics Group, Inc.

The economic impacts of fishing, hunting and wildlife-associated recreation, **excluding** equipment purchases by anglers and hunters, are summarized in Table 8, and shown in greater industry detail in Tables A.19 to A.24 in the Appendix. The economic impact of equipment purchases related to fishing, hunting and other wildlife-associated recreation is included in the economic impact of retail sporting goods sales described earlier. The total economic impact from fishing, hunting and wildlife-associated recreation activity is estimated at \$3.6 billion in 2004. Nearly 52,000 jobs are supported either directly or indirectly from fishing, hunting and wildlife-associated recreation activities, and these jobs generated \$1.4 billion in labor compensation.³³ Approximately \$2.1 billion in estimated Gross State Product was generated from sport fishing, hunting and wildlife-associated recreation. The state and local government revenues from taxes and fees from these recreation activities are estimated at \$253 million annually.

- The Economic Impact of Recreational Golf and Golf Courses

Golf is one of the most popular recreational activities in the nation, and Florida is one of the leading states in rounds of golf played, golf courses and leisure travelers that play golf during their overnight trips.³⁴ The State's golf courses generate some of the highest revenue per round of golf in the nation.

A University of Florida survey estimated that 58.6 million rounds of golf were played on Florida golf courses in 2000.³⁵ Survey data from the National Golf Foundation (NGF) indicates that from 2000 to 2004 the rounds of golf played at Florida courses increased by nearly 6 percent, and revenue per round at Florida courses increased at a rate of

³³ Including the economic impact of sales of fishing, hunting and wildlife watching sporting goods increases the number of supported jobs to about 70,000, and \$1.9 billion in labor compensation.

³⁴ *Golf 20/20: The Golf Economy Report*, National Golf Foundation (December 2002).

³⁵ Haydu, J. and A. Hodges, *Economic Impacts of the Florida Golf Course Industry*. University of Florida, Institute of Food and Agricultural Science, 2002.

approximately 5 percent per year over that same period. We estimate that golf course revenues in 2004 reached a level of \$5.7 billion, compared to \$4.4 billion in 2000.

Nearly one-third of the rounds played in 2000 were played by out-of-state visitors, and it was estimated that 3.1 million visitors played golf during their Florida visit.³⁶ We estimate that approximately 3.3 million of the 77 million out-of-state visitors to Florida in 2004 (4.3 percent) played golf during their trip to Florida. According to NGF survey information, approximately 32 percent of all golf trips were planned specifically for the purpose of playing golf (i.e., “golf-specific” trips). Forty-seven (47) percent of visitors who played golf were otherwise on vacation, while 21 percent were on a business trip. In order to determine the average trip expenditure attributable to golf, we allocated 100 percent of travel-related spending for “golf-specific” trips, 30 percent of travel-related spending for vacation trips, and 15 percent of travel-related spending for business trips. This procedure, used to avoid giving too much weight to the role of golf in visitor spending, resulted in an estimate of \$436 in travel-related spending per golf trip.³⁷

Recreational golf in Florida by out-of-state visitors is estimated to have contributed \$4 billion in travel-related spending in the State in 2004. The bulk of this spending was allocated to lodging and food and beverage (39 percent and 20 percent, respectively). Transportation expenses accounted for 30 percent, while entertainment spending represented 11 percent of the total (see Figure 8).

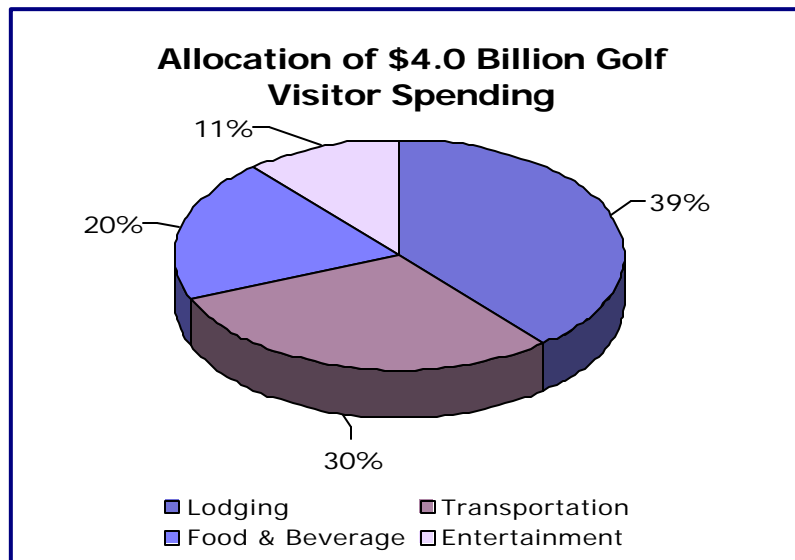


Figure 8

³⁶ Haydu, J. and A. Hodges (2002).

³⁷ The estimated average travel-related spending on a golf-specific trip was \$630. The spending weights employed here are the same as those used by the NGF.

Table 9. Estimated Golf Travelers and Related Hospitality Spending

	2000	2004
Rounds	19,040,000	20,161,000
Golf Travelers	3,120,000	3,304,000
Hospitality Spending Per Trip	\$394.79	\$435.78
Avg. Number of Trips per Year	2.8	2.8
Number of Trips	8,736,000	9,251,200
Total Hospitality Spending Attributed to Golf	\$3,448,922,000	\$4,031,488,000
Lodging	1,345,037,000	1,572,231,000
Transportation	1,034,624,000	1,209,385,000
Food and Beverage	689,837,000	806,359,000
Entertainment	379,424,000	443,513,000

Notes:

1. "Golf Travelers" are out-of-state visitors who played golf during their visit. Of these visitors, 32 percent traveled specifically to play golf, 47 percent played golf as part of their vacation, and 21 percent played golf while on a business trip.
2. "Hospitality Spending" refers to lodging, food, transportation and entertainment attributed to golf. 2000 estimates of spending and average number of trips from "Golf 20/20 Vision for the Future", National Golf Foundation, 2003.
3. The 2000 estimates of golf travelers and visitor rounds are from J. Haydu and A. Hodges, *Economic Impacts of the Florida Golf Course Industry*, University of Florida, Institute of Food and Agricultural Science, 2002.

The direct spending impact from recreational golf in Florida for residents and visitors in 2004 is estimated at \$8.6 billion. The direct economic impact from the expenditures on golf course operations is estimated at \$4.1 billion, accounting for nearly half of the direct economic impact. Purchases from the food service industries resulted in an estimated direct economic impact of \$1.8 billion, while lodging expenditures accounted for \$1.6 billion of direct economic impact. Food service and lodging expenditures by overnight visitors accounted for approximately 40 percent of the direct economic impacts. The direct impacts from entertainment spending were estimated at \$444 million. Only one-half of the estimated expenditures on transportation were used in the calculation of direct economic impacts. The direct economic impact from transportation purchases was estimated at \$605 million. These direct economic impacts result in significant indirect and induced economic impacts.

The total economic impact from recreational golf and golf courses (excluding retail purchases of golf equipment, which are implicitly accounted for in Table 6) is projected at \$16.8 billion. (See Table 10.) This sport and recreational activity also supports nearly 204,000 employment positions, generating \$6.1 billion in labor income. The Gross State Product from golf is \$9.9 billion, and state and local government revenues from golf are estimated at \$1.1 billion. The economic impacts by industry are shown in Tables A.25 to A.30 in the Appendix.

Table 10. Economic Impact of Recreational Golf and Golf Courses (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	8,591	8,210	16,801
Employment (full and part-time positions)	122,350	81,425	203,775
Gross State Product (Million 2004 \$)	4,931	4,975	9,906
Labor Income (Million 2004 \$)	3,160	2,908	6,069
Profits, Interest and Rent (Million 2004 \$)	1,133	1,624	2,757
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	1,119

Source: The Washington Economics Group, Inc.

- The Economic Impact of Professional Sports Teams

Florida hosts nine professional team sports franchises: two Major League Baseball (MLB) teams; three National Football League (NFL) franchises; two National Basketball Association (NBA) teams; and two National Hockey League (NHL) franchises.³⁸ Collectively, these professional teams make a significant economic contribution to the State, enhance the quality of life of Florida residents and offer valuable synergies with the State's tourism cluster. Professional teams also serve to attract new businesses to the State as they are part of the quality of life of a city or region.

Home game attendance at Florida's professional sports team competitions collectively reached over 7.4 million patrons in the 2004 playing seasons. Total revenues for Florida's professional franchises is reported at \$1.03 billion.³⁹ Total revenues, however, do not represent total direct economic impact since some of these revenues are directed to salaries of players (and top executives) who live (and spend) in Florida only part of the year, and the teams purchase some goods and services from business establishments outside of Florida. The direct economic impact from the Florida operations (excluding 36 percent of player payroll, allowing for a potential shift in consumer spending from other entertainment services and purchases from non-Florida vendors⁴⁰) is estimated at \$629 million.

Florida sports teams attract out-of-state visitors to home games (particularly, during championship playoff series) and, therefore, provide another source of economic impact to the State. The professional franchises in Florida report that approximately 4.9 percent of their collective attendance (or 361,000 spectators in 2004) is comprised of out-of-town visitors.

³⁸ In addition to the major league teams, the State hosts a number of minor league sports teams. The economic impact of the minor league teams is not included in this study. NHL 2004-05 season was not played. The impact of the 2005 Superbowl was not included.

³⁹ *Forbes Magazine* on-line, www.forbes.com/lists (May 2005). Revenue estimates include NHL teams in 2003-04 season.

⁴⁰ The allowance for the potential shift in consumer purchases and purchases from non-Florida vendors represented 20 percent of total revenues.

Large numbers of out-of-state guests also come to Florida to see their favorite teams compete in Major League Baseball's Spring Training season. Attendance for the 2004 Spring Training season was 1.6 million, and it is estimated that 815,000 spectators came from outside of Florida.⁴¹ Fan surveys indicate that these visitors spend, on average, \$69.10 per night per person **outside** of the baseball stadium.⁴²

We estimate that total out-of-state visitor spending outside of stadiums and arenas in 2004 was approximately \$129.3 million.⁴³

The total direct economic impact from professional sports team (operations and event-related out-of-state visitors) was estimated at \$1.1 billion in 2004.

Table 11. Economic Impact of Professional Sports Teams (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	1,106	987	2,094
Employment (full and part-time positions)	7,503	10,701	18,204
Gross State Product (Million 2004 \$)	736	611	1,347
Labor Income (Million 2004 \$)	646	367	1,012
Profits, Interest and Rent (Million 2004 \$)	6	187	193
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	143

Source: The Washington Economics Group, Inc.

The economic impacts of professional sports teams in Florida are summarized in Table 11. (Tables A.31 to A.36 provide impact estimates by industry.) The total economic impact from professional sports and related out-of-state visitors is estimated at \$2.1 billion in 2004. Just over 18,000 jobs are supported either directly or indirectly from Florida's professional sports teams, and these jobs generated \$1.0 billion in labor compensation. Approximately \$1.3 billion in estimated Gross State Product was generated from professional sports franchises. The state and local government revenues from taxes and fees from MLB, NFL, NBA and NHL franchises are estimated at \$143 million annually.

⁴¹ A 2000 study of Florida Spring Training by Van Horn Associates indicated that 51 percent of attendance was from outside of Florida. This same percentage was used to estimate attendance by out-of-state residents in 2004. Total attendance for 2004 as reported by the Florida Sports Foundation.

⁴² *Economic and Fiscal Impacts of Associated with Major League Baseball Spring Training Operations in the State of Florida*, Van Horn Associates, May 2000. The survey estimate of average expenditures outside the stadium was \$63.20 in 2000, representing \$69.10 in 2004 dollars (i.e., adjusting for price inflation between 2000 and 2004). This survey also indicated that out-of-state fans at spring training games attended 5.7 games on average and stayed an average of 10.5 nights in Florida. That is, each ticket sold to an out-of-state fan during spring training resulted, on average, in 1.84 visitor nights.

⁴³ Estimate based on allocating one-visitor night per out-of-state attendance at a regular season game and 1.84 visitor nights per out-of-state attendance at a baseball spring training game.

- The Economic Impact of Pari-Mutuel Sports

Florida's pari-mutuel sports facilities (horse racing, greyhound racing and jai alai) experienced paid attendance of just over 2.8 million in 2004 (state fiscal year basis). Paid attendance was up 2 percent over the previous year, but paid attendance does not fully reflect the number of patrons that viewed live or simulcast sporting events because these do not include free admission or complimentary passes. Florida pari-mutuels also sell their racing products outside of Florida and outside the U.S. (i.e., export their product) via simulcasts.

Pari-mutuel sports operators earned \$284.5 million in revenues in 2004. Thoroughbred horse racing and greyhound racing are the largest components of this industry, accounting for 85 percent of total industry revenues (see Figure 9).

The economic impacts of thoroughbred horse racing extend beyond the racing events themselves to the care and breeding of thoroughbreds. It is estimated that there are approximately

52,000 thoroughbreds in Florida.⁴⁴ It is estimated, however, that only about 70 percent of Florida thoroughbreds are actively engaged in racing. Considerable expenditures are necessary to maintain a racing thoroughbred, and we estimate that the care and maintenance of a racing thoroughbred in Florida averages approximately \$35,700 per year.⁴⁵ Not all of these expenses, however, are likely to reflect purchases of goods and services produced in Florida, and IMPLAN model regional purchase coefficients suggest that about one-fourth of those estimated expenditures are likely to represent purchases from out-of-state businesses.

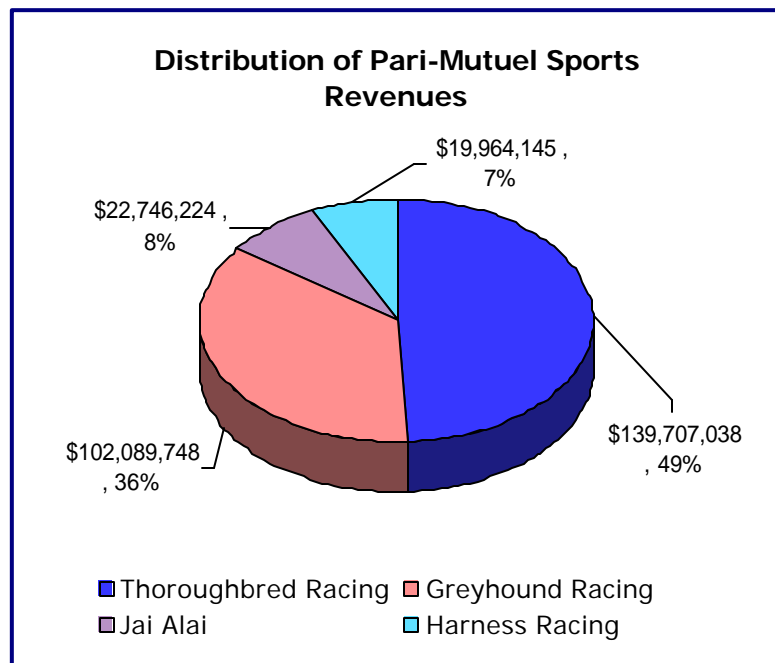


Figure 9

⁴⁴ *The Economic Impact of the Horse Industry in the United States: Volume 3*. The American Horse Council, 1997.

⁴⁵ Falcone, M. and J. N. Ader (Bear, Stearns and Company, Inc. *Gaming Industry: Equity Research*, December 2000) estimated the cost of maintenance for a racing thoroughbred averaged \$2,650 per month. The average annual cost of maintaining a racing thoroughbred is estimated in 2004 by adjusting the 2000 estimate for inflation.

The direct expenditures associated with Florida racing thoroughbreds in 2004 are estimated at \$950 million.⁴⁶

The direct economic impact from pari-mutuel sports and the care of thoroughbred horses is estimated at nearly \$1.3 billion annually.⁴⁷

Table 12. Economic Impact of Pari-Mutuel Sports (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	1,287	1,175	2,462
Employment (full and part-time positions)	25,200	11,747	36,946
Gross State Product (Million 2004 \$)	776	709	1,485
Labor Income (Million 2004 \$)	580	422	1,002
Profits, Interest and Rent (Million 2004 \$)	165	222	387
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	109

Source: The Washington Economics Group, Inc.

The total economic impacts of Florida's pari-mutuel sports industry is summarized in Table 12. Florida's pari-mutuels (and the care and maintenance of racing thoroughbreds) support an economic impact of \$2.5 billion, including the indirect and induced economic effects. Approximately 37,000 employment positions (both full and part-time, salaried workers and sole proprietors) are supported by this sports industry, and the industry generates an estimated \$1.0 billion in labor compensation. Florida's Gross State Product is enhanced by \$1.5 billion, and \$109 million in state and local government revenues are also generated either directly or indirectly by this industry. (For economic impacts by industry see Tables A.37 to A.42 in the Appendix.)

- The Economic Impact of Recreational Ownership of Horses

A study prepared for the American Horse Council Foundation (AHCf) estimated that there were between 147,000 and 299,000 horses in Florida in January of 1995 based on the results of various surveys and adjustments to account for horse owners who are not members of surveyed organizations.⁴⁸ The difference between the upper and lower bounds of the estimate represents the application of an adjustment factor for nonmembers of owner organizations. Since the adjustment factor was admittedly imprecise, we used the midpoint between the

⁴⁶ It is interesting to note that according to Falcone and Ader (previously cited), 90 percent of thoroughbred owners actually lose money from racing. This suggests that profit is not the primary motivation for owning and racing thoroughbreds.

⁴⁷ The analysis of economic impacts from the pari-mutuel sports industry did not include the care and maintenance of greyhounds due to lack of data on number of racing dogs and typical maintenance costs.

⁴⁸ The U.S. Department of Agriculture conducts a Census of Agriculture every five years that provides a census of horses on farms. The latest (2002) census puts the number of horses on Florida farms at 99,911. The American Horse Council's estimate includes all horses regardless of where they are kept. An update to the AHC report has not yet been published.

upper and lower bounds of the AHCF estimates in the calculation of economic impacts, although we note that the number of horses in Florida may have increased since the time the AHCF estimates were prepared.⁴⁹

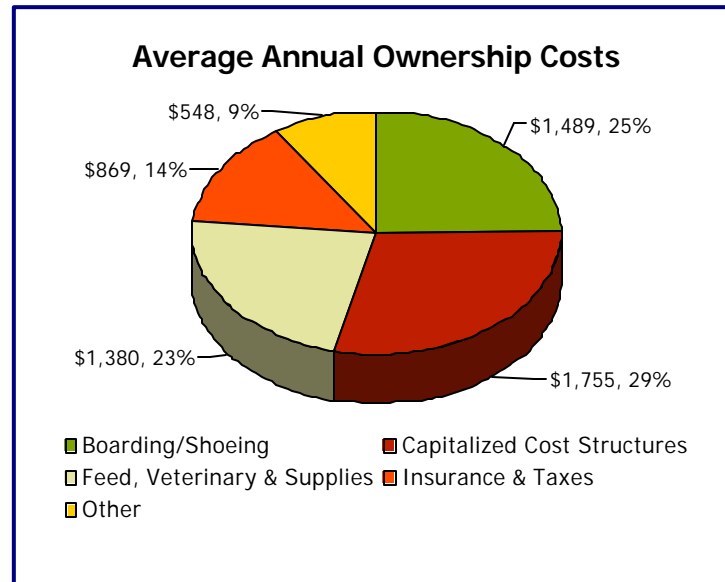


Figure 10

The University of Arizona, Cooperative Extension estimates that the average annual cost of caring for a pleasure horse is between \$5,400 for an owner-housed animal and \$6,400 for a boarded animal. For purposes of this economic impact study we used a weighted average annual cost estimate of \$6,030 (assigning more weight to the cost of boarded animals). The allocation of these ownership costs are shown in Figure 10. The average annual cost estimate together with an estimate of 193,000 horses (excludes the estimate of racing thoroughbreds) suggests a direct economic impact from recreational ownership of horses of nearly \$1.2 billion.

The direct economic impacts are experienced across a wide variety of industry groups. (See Figures 11-12.) The total economic impacts, therefore, are more evenly distributed across a wider variety of industry groups than one usually finds.

⁴⁹ The authors of the AHCF report note that the accuracy of their horse population estimates are dependent upon the accuracy of the adjustment factor that was used (page 41, *The Economic Impact of the Horse Industry in the United States: Volume 3*). The potential for error in the horse population in any given state is larger than the potential for error in the national estimate of 6.9 million horses in 1995.

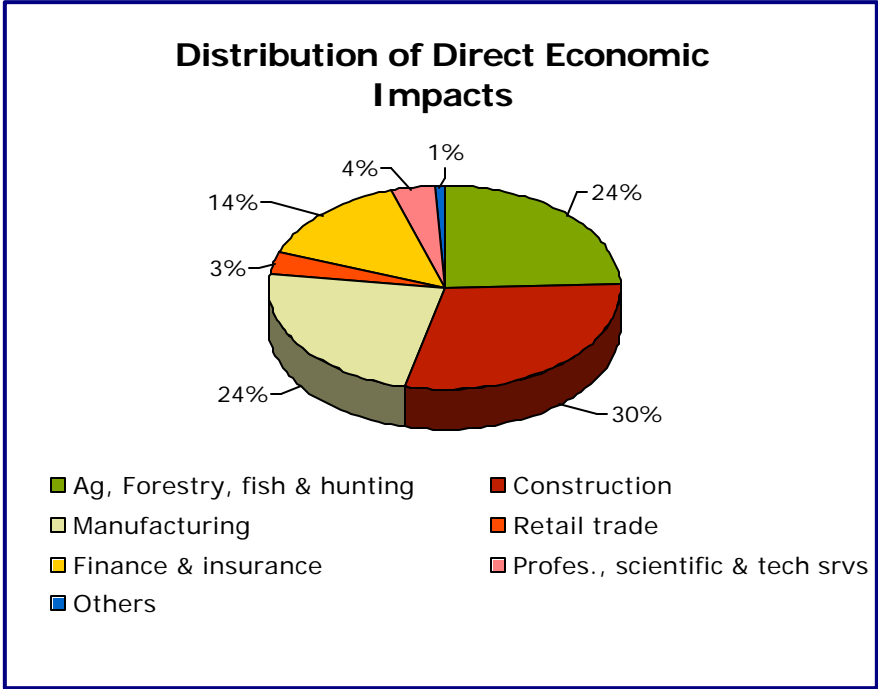


Figure 11

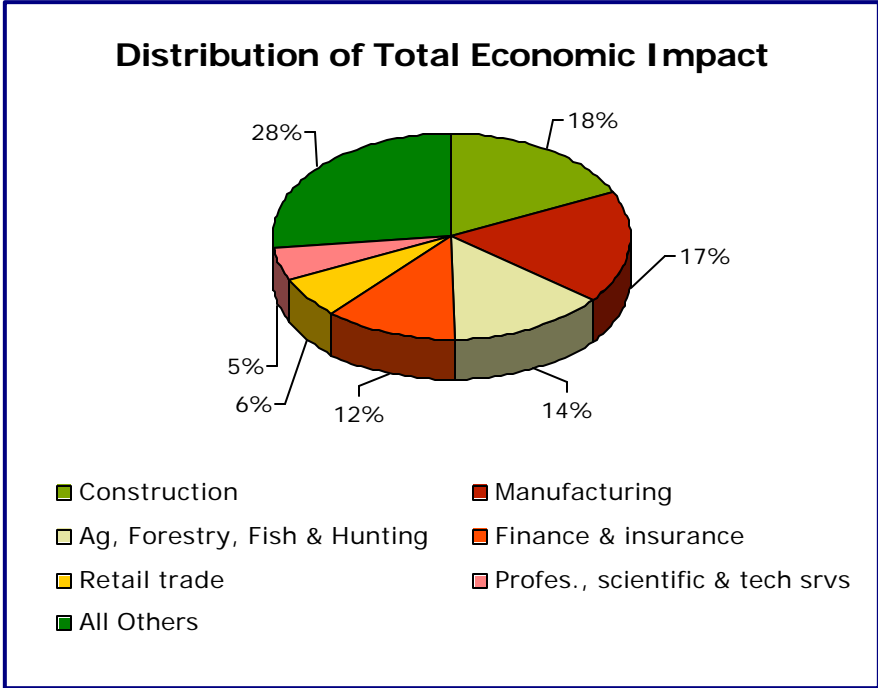


Figure 12

Table 13. Economic Impact of Recreational Ownership of Horses (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	1,160	965	2,125
Employment (full and part-time positions)	15,643	9,519	25,162
Gross State Product (Million 2004 \$)	592	579	1,171
Labor Income (Million 2004 \$)	417	347	764
Profits, Interest and Rent (Million 2004 \$)	159	178	337
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	82

Source: The Washington Economics Group, Inc.

The total economic impact of recreational ownership of horses is estimated at \$2.1 billion, and this activity supports nearly 25,200 employment positions (full-time, part-time and self-employed). The labor compensation generated from recreational ownership of horses is estimated at \$764 million. Recreational ownership of horses also contributes an estimated \$1.2 billion to Florida's Gross State Product and \$82 million in revenues for state and local governments. The economic impacts of recreational ownership of horses by broad industry group are presented in Tables A.43 to A.48 in the Appendix.

- The Economic Impact of Sports Commissions-Sponsored Events

There are 18 regional sports commissions across the State of Florida, and most of these public-private partnerships are closely associated with county or regional tourism promotion agencies. The synergies between sports and recreation and tourism are very clear and widely recognized. Like the Florida Sports Foundation, these regional commissions are focused on promoting and developing professional, amateur and recreational sports and physical fitness opportunities. The sports commissions provide technical support, serve as a coordination function between the public sector and the private sector, help promote sports events, and also provide limited financial support to nongovernmental agencies involved in sports promotion. The sports commissions help to bring amateur, recreational, and professional sporting events, small and large, to their regions on a continuous basis and, thereby, complement the regional economic development efforts that occur across Florida.

Each of the regional sports commissions was surveyed for information on the number of room nights associated with each of the regional events that they sponsored. The survey data indicated that the participation of the commissions helped to generate nearly 1.2 million visitor nights (excluding nights associated with golf and tennis events and fishing tournaments, as the economic impact from these are estimated separately). Using Visit

Florida statistics,⁵⁰ we estimated visitor spending at \$465 per group per night and total visitor spending at \$439 million. In addition to the regional events supported by the sports commissions, Florida produces the Sunshine State Games each year.

Florida began producing the Sunshine State Games 25 years ago. These games are held each year in different locations around Florida and culminate in an Olympic-style competition for amateur athletes of all ages and skill levels. The athletes, accompanied by coaches, family members and friends gather in the summer to compete in a wide number of events. While the principal goal of the Sunshine State Games is to provide Florida's

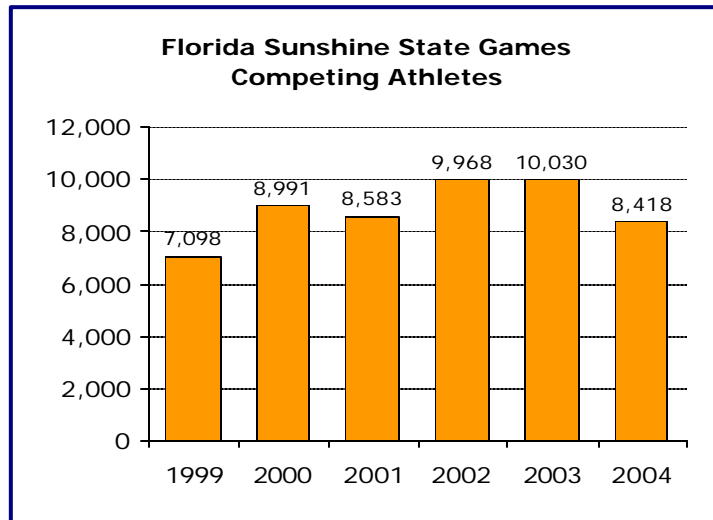


Figure 13

amateur athletes an opportunity and incentive to develop their physical talents and competitive abilities, the events draw visitors from across Florida and generate significant regional economic impacts. Although the highlight of the Games is a four-day summer festival, a number of preliminary competitions are held prior to the festival in a number of locations across Florida. The Sunshine State Games provide Florida's amateur athletes the opportunity to participate in high quality competition without having to leave the State, keeping visitor spending from otherwise occurring outside of Florida.

Over the last five years, the number of participating athletes has averaged 9,200, and attendance has ranged from 8,400 to 10,000. Total attendance at the games (including coaches and spectators) can be reasonably estimated at an average of 32,000. In 2004 the number of participating athletes reached just over 8,400, and generated an estimate of 88,000 visitor room nights. These room nights resulted in \$34 million of tourism-related spending in Florida.

The sports commissions-sponsored events and the Sunshine State Games in 2004 resulted in a significant economic impact for Florida.⁵¹ The estimated economic impacts are summarized in Table 14.

⁵⁰ 2003 Florida Visitor Study, Visit Florida, 2004.

⁵¹ These economic impacts are based solely on estimated tourism-related expenditures as data on the actual cost of holding the events was not available. It should be noted that event sponsors must demonstrate that without financial support it would not have been possible to hold the event. The events are eligible for financial assistance for only three years.

Table 14. Economic Impact of Florida's Sports Commissions -Sponsored Events (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	353	315	668
Employment (full and part-time positions)	6,506	3,161	9,667
Gross State Product (Million 2004 \$)	219	190	409
Labor Income (Million 2004 \$)	135	110	245
Profits, Interest and Rent (Million 2004 \$)	55	63	117
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	48

Source: The Washington Economics Group, Inc.

The total economic impact of sports commissions-sponsored events and the Sunshine State Games is estimated at \$668 million, supporting nearly 9,700 employment positions (full-time, part-time and self-employed). The labor compensation generated from these sports and recreation events is estimated at \$245 million. Sports commissions' events and the Sunshine State Games also contribute an estimated \$409 million to Florida's Gross State Product in addition to \$48 million in revenues for state and local governments. The estimated economic impacts by major industry group from sports commission events and the Sunshine State Games are presented in Tables A.49 to A.54 in the Appendix.

- The Economic Impact of Florida's Professional Golf and Tennis Events

The professional golf and tennis associations were asked to provide data regarding their organization and industry's economic activities in Florida in order to assess their economic impacts. The economic impact estimates of this sector of Florida's sports and recreation cluster are based on the information submitted by such organizations, and related estimates were prepared by the study authors.

The Ladies Professional Golf Association (LPGA), United States Tennis Association (USTA) and the PGA Tour held Florida events in 2004 with approximately 420,000 fans in attendance.⁵² The associations and news articles indicate that approximately 20 percent of the attendance represented out-of-town visitors. These visitors generated an estimated 277,000 hotel room nights and \$71.4 million in tourism-related spending in Florida.

Visitor spending, together with estimated office and event production expenditures in Florida of \$38.4 million, results in a direct economic impact of nearly \$110 million.

⁵² Estimate is based on information reported by the organizations, and attendance data reported in news coverage of some of the major events.

Table 15. Economic Impact of Florida's Professional Golf and Tennis Events (Summary)

<i>Impact</i>	<i>Direct Impact</i>	<i>Indirect and Induced Impact</i>	<i>Total Impact</i>
Economic Output (Million 2004 \$)	110	102	211
Employment (full and part-time positions)	1,978	1,053	3,031
Gross State Product (Million 2004 \$)	67	62	128
Labor Income (Million 2004 \$)	42	36	78
Profits, Interest and Rent (Million 2004 \$)	16	20	37
State & Local Govt Revenue (Mill. 2004 \$)	NA	NA	14

Source: The Washington Economics Group, Inc.

The total economic impact from professional golf and tennis tournaments is estimated at \$211 million, and this activity supports just over 3,000 employment positions (full-time, part-time and self-employed). The labor compensation generated from pro tournaments is estimated at \$78 million. The pro tournaments also contribute an estimated \$128 million to Florida's Gross State Product and \$14 million in revenues for state and local governments. The estimates of the economic impact are presented in Tables A.55 to A.60 in the Appendix.

V. CONCLUSIONS

The comprehensive study of the sports and recreation sector of Florida yields a number of conclusions concerning the contributions of the sector to the State's economy. These conclusions are useful for policymakers to consider in developing a legislative agenda to facilitate the expansion of sports and recreation industries ("the sector"). Among principal conclusions are the following:

- Florida has developed a large and growing sports and recreation sector, based on the comparative advantage of the State and the promotion of the sector by State and local officials.

Therefore, additional State and local efforts to expand sports activities in Florida would yield positive and long-term benefits to the State, given the State's comparative advantage and the expanding number of industries in the sports cluster.

- The sports and recreation sector is an important driver of Florida's strategic economic development efforts. Among these sector's attributes are:
 - The sector's strong links between its industries and visitors provide growing opportunities for "exporting services" to other U.S. regions and globally.
 - The sector contributes to the State's economic diversification efforts by directly and indirectly generating revenues to businesses across a broad spectrum of industries and by supporting employment opportunities in a wide variety of occupations.
 - Sports and recreation industries also facilitate the recruitment and expansion of corporate enterprises since they positively contribute to the quality of life derived from living and working in Florida.
- The quantifiable impacts of the sports and recreation sector are currently quite significant, providing strong support to output, income, employment levels in the State and to fiscal revenues. Principal economic estimates are as follows:
 - \$32 billion in economic impact
 - 434,000 jobs supported
 - \$13 billion in compensation to workers

APPENDIX I
DETAILED ECONOMIC IMPACT TABLES

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**Table A.1. Economic Impact of Sports and Recreation Activities in Florida
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	732,099,392	70,202,112	48,366,857	850,668,361
21 Mining	0	19,486,233	16,928,462	36,414,695
22 Utilities	6,736,174	251,627,442	208,874,937	467,238,553
23 Construction	765,254,096	143,874,813	823,191,571	1,732,320,480
31-33 Manufacturing	471,615,208	464,640,035	526,345,780	1,462,601,023
42 Wholesale Trade	271,787,968	409,094,008	538,120,569	1,219,002,545
48-49 Transportation & Warehousing	928,198,580	370,542,538	296,859,027	1,595,600,145
44-45 Retail trade	1,346,767,790	200,406,908	1,195,931,936	2,743,106,634
51 Information	0	409,797,595	348,351,712	758,149,307
52 Finance & insurance	266,424,016	407,496,935	937,607,783	1,611,528,734
53 Real estate & rental	7,758,120	766,123,646	639,507,940	1,413,389,706
54 Professional, scientific & tech services	127,167,650	583,083,989	460,073,502	1,170,325,141
55 Management of companies	0	215,631,198	110,677,621	326,308,819
56 Administrative & waste services	0	452,664,302	236,916,733	689,581,035
61 Educational services	0	27,895,084	121,706,701	149,601,785
62 Health & social services	0	3,097,745	1,403,097,445	1,406,195,190
71 Arts, entertainment & recreation	5,830,848,600	174,522,284	154,839,582	6,160,210,466
72 Accommodation & food services	5,133,452,216	118,084,746	524,914,079	5,776,451,041
81 Other services	197,878	164,025,333	468,397,608	632,620,819
92 Government & non-NAICS establish.	<u>703,419,454</u>	<u>226,645,835</u>	<u>1,180,832,436</u>	<u>2,110,897,725</u>
Total	16,591,727,142	5,478,942,781	10,241,542,281	32,312,212,204

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

**Table A.2 Economic Impact of Sports and Recreation Activities in Florida
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	26,129	1,014	658	27,801
21 Mining	0	97	84	181
22 Utilities	11	467	400	878
23 Construction	6,401	1,786	7,164	15,350
31-33 Manufacturing	2,627	2,377	2,491	7,496
42 Wholesale Trade	1,934	2,911	3,829	8,674
48-49 Transportation & Warehousing	5,197	3,936	2,879	12,013
44-45 Retail trade	28,378	3,413	20,369	52,160
51 Information	0	2,250	1,613	3,863
52 Finance & insurance	2,471	2,547	5,529	10,546
53 Real estate & rental	51	4,474	4,368	8,893
54 Professional, scientific & tech services	2,015	7,026	5,413	14,453
55 Management of companies	0	1,363	700	2,063
56 Administrative & waste services	17,511	8,115	4,547	30,173
61 Educational services	0	429	2,391	2,820
62 Health & social services	0	25	18,081	18,107
71 Arts, entertainment & recreation	66,763	3,912	2,576	73,251
72 Accommodation & food services	99,611	2,558	11,640	113,810
81 Other services	5	2,120	10,201	12,326
92 Government & non-NAICS establish.	<u>17,518</u>	<u>764</u>	<u>859</u>	<u>19,142</u>
Total	276,662	51,584	105,793	433,999

Note: Employment positions include sole proprietors.

**Table A.3. Economic Impact of Sports and Recreation Activities in Florida
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	572,300,240	37,221,776	25,876,334	635,398,350
21 Mining	0	4,927,788	4,039,594	8,967,382
22 Utilities	4,741,883	174,322,964	142,701,420	321,766,267
23 Construction	293,818,572	70,907,846	315,461,679	680,188,097
31-33 Manufacturing	158,945,002	159,494,598	187,607,626	506,047,226
42 Wholesale Trade	196,773,456	296,182,497	389,597,227	882,553,180
48-49 Transportation & Warehousing	362,686,284	202,124,325	146,251,529	711,062,138
44-45 Retail trade	1,018,372,921	150,707,586	899,080,579	2,068,161,086
51 Information	0	202,783,136	186,252,857	389,035,993
52 Finance & insurance	211,402,032	247,766,054	493,552,742	952,720,828
53 Real estate & rental	2,887,586	532,977,740	427,531,217	963,396,543
54 Professional, scientific & tech services	58,001,784	426,626,523	339,029,642	823,657,949
55 Management of companies	0	149,432,558	76,699,661	226,132,219
56 Administrative & waste services	433,320,192	271,802,461	147,776,141	852,898,794
61 Educational services	0	16,359,113	72,111,236	88,470,349
62 Health & social services	0	1,277,040	856,256,394	857,533,434
71 Arts, entertainment & recreation	3,466,434,298	108,705,739	92,347,800	3,667,487,837
72 Accommodation & food services	3,209,127,392	62,524,873	265,423,130	3,537,075,395
81 Other services	104,444	62,811,572	222,166,657	285,082,673
92 Government & non-NAICS establish.	<u>435,288,958</u>	<u>157,711,571</u>	<u>919,539,749</u>	<u>1,512,540,278</u>
Total	10,424,205,044	3,336,667,760	6,209,303,214	19,970,176,018

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

**Table A.4. Economic Impact of Sports and Recreation Activities in Florida
Total Labor Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	479,963,648	18,873,899	13,016,351	511,853,898
21 Mining	0	2,285,699	1,848,445	4,134,144
22 Utilities	1,409,189	53,585,014	44,574,225	99,568,428
23 Construction	250,195,212	68,854,147	277,035,462	596,084,821
31-33 Manufacturing	95,863,288	106,550,784	120,523,394	322,937,466
42 Wholesale Trade	108,900,872	163,917,095	215,615,867	488,433,834
48-49 Transportation & Warehousing	298,074,612	169,160,423	118,133,644	585,368,679
44-45 Retail trade	606,812,433	91,815,573	542,559,490	1,241,187,496
51 Information	0	128,860,835	93,326,473	222,187,308
52 Finance & insurance	119,403,844	137,285,384	291,237,624	547,926,852
53 Real estate & rental	1,786,401	112,661,723	105,656,794	220,104,918
54 Professional, scientific & tech services	51,345,496	353,551,893	288,095,845	692,993,234
55 Management of companies	0	102,100,162	52,405,232	154,505,394
56 Administrative & waste services	418,910,832	227,269,029	123,091,365	769,271,226
61 Educational services	0	11,661,528	65,766,903	77,428,431
62 Health & social services	0	1,109,048	760,276,816	761,385,864
71 Arts, entertainment & recreation	2,403,193,768	90,236,670	65,727,717	2,559,158,155
72 Accommodation & food services	2,022,250,428	46,582,903	206,841,501	2,275,674,832
81 Other services	98,047	53,501,414	206,386,648	259,986,109
92 Government & non-NAICS establish.	<u>419,241,131</u>	<u>37,367,605</u>	<u>41,650,373</u>	<u>498,259,109</u>
Total	7,186,264,401	1,977,230,828	3,633,770,169	12,888,450,198

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

**Table A.5. Economic Impact of Sports and Recreation Activities in Florida
Total Capital Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	85,867,160	17,032,061	11,807,605	114,706,826
21 Mining	0	2,093,364	1,713,752	3,807,116
22 Utilities	2,556,064	92,570,868	75,104,074	170,231,006
23 Construction	39,424,512	1,190,303	34,752,827	75,367,642
31-33 Manufacturing	59,620,857	48,590,757	62,512,545	170,724,159
42 Wholesale Trade	42,662,628	64,215,595	84,468,929	191,347,152
48-49 Transportation & Warehousing	21,230,421	20,863,409	21,032,453	63,126,283
44-45 Retail trade	211,627,950	30,021,535	182,085,568	423,735,053
51 Information	0	60,779,880	75,822,212	136,602,092
52 Finance & insurance	90,523,352	98,513,874	179,828,050	368,865,276
53 Real estate & rental	949,288	352,221,959	262,606,515	615,777,762
54 Professional, scientific & tech services	2,799,153	66,118,254	43,887,150	112,804,557
55 Management of companies	0	44,950,900	23,072,075	68,022,975
56 Administrative & waste services	0	36,924,297	20,515,364	57,439,661
61 Educational services	0	3,876,132	4,987,941	8,864,073
62 Health & social services	0	144,077	85,448,975	85,593,052
71 Arts, entertainment & recreation	650,899,473	8,869,797	16,466,071	676,235,341
72 Accommodation & food services	747,914,488	9,515,530	34,380,640	791,810,658
81 Other services	3,384	7,679,465	10,933,690	18,616,539
92 Government & non-NAICS establish.	<u>1,634,698</u>	<u>120,192,435</u>	<u>750,492,858</u>	<u>872,319,991</u>
Total	1,957,713,428	1,086,364,492	1,981,919,294	5,025,997,214

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.6. State and Local Government Revenue Impact of Sports and Recreation Activities in Florida

Source	Amount \$
Sales Taxes	900,958,142
Property Taxes	694,232,648
Other Indirect Business Taxes	210,356,982
Payroll Taxes	20,956,143
Licenses, Fines and Fees	94,311,324
Corporate and Dividend Taxes	<u>192,344,708</u>
Total	2,113,159,947

Table A.7. Economic Impact of Consumer Spending on Sports/Recreation Apparel and Equipment

Total Economic Output (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	325,841	4,117,212	4,443,053
21 Mining	0	870,090	1,445,409	2,315,498
22 Utilities	0	13,884,441	17,761,298	31,645,740
23 Construction	0	6,135,146	81,734,824	87,869,968
31-33 Manufacturing	65,711,000	16,052,255	46,362,768	128,126,024
42 Wholesale Trade	271,787,968	17,436,580	46,108,644	335,333,216
48-49 Transportation & Warehousing	8,444,002	23,148,652	25,526,804	57,119,456
44-45 Retail trade	1,046,463,488	9,358,567	102,491,328	1,158,313,344
51 Information	0	33,032,032	29,734,296	62,766,328
52 Finance & insurance	0	23,275,006	79,467,016	102,742,024
53 Real estate & rental	0	48,938,824	54,975,828	103,914,648
54 Professional, scientific & tech services	0	38,071,700	40,486,364	78,558,064
55 Management of companies	0	42,575,092	9,509,896	52,084,988
56 Administrative & waste services	0	28,387,246	20,377,756	48,765,004
61 Educational services	0	355,043	10,274,914	10,629,957
62 Health & social services	0	23,360	118,604,248	118,627,608
71 Arts, entertainment & recreation	0	2,608,114	13,090,541	15,698,654
72 Accommodation & food services	0	5,966,283	44,332,576	50,298,852
81 Other services	0	7,673,945	39,702,028	47,375,972
92 Government & non-NAICS establish.	0	9,955,171	99,788,800	109,743,968
Total	1,392,406,458	328,073,385	885,892,550	2,606,372,366

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

**Table A.8. Economic Impact of Consumer Spending on Sports/Recreation Apparel and Equipment
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	4	56	60
21 Mining	0	4	7	12
22 Utilities	0	25	34	59
23 Construction	0	76	709	785
31-33 Manufacturing	551	99	220	871
42 Wholesale Trade	1,934	124	328	2,386
48-49 Transportation & Warehousing	68	296	248	612
44-45 Retail trade	21,908	159	1,746	23,812
51 Information	0	182	138	320
52 Finance & insurance	0	141	469	610
53 Real estate & rental	0	310	375	685
54 Professional, scientific & tech services	0	462	478	940
55 Management of companies	0	269	60	329
56 Administrative & waste services	0	533	392	925
61 Educational services	0	6	202	208
62 Health & social services	0	0	1,528	1,528
71 Arts, entertainment & recreation	0	54	218	272
72 Accommodation & food services	0	123	983	1,106
81 Other services	0	94	863	957
92 Government & non-NAICS establish.	<u>0</u>	<u>33</u>	<u>73</u>	<u>106</u>
Total	24,461	2,994	9,126	36,581

Note: Employment positions include sole proprietors.

Table A.9. Economic Impact of Consumer Spending on Sports/Recreation Apparel and Equipment

Total Gross State Product (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	168,830	2,192,168	2,360,998
21 Mining	0	190,598	346,712	537,311
22 Utilities	0	9,625,957	12,135,021	21,760,978
23 Construction	0	3,024,173	31,252,414	34,276,588
31-33 Manufacturing	26,090,826	6,144,053	16,514,470	48,749,348
42 Wholesale Trade	196,773,456	12,624,017	33,382,482	242,779,936
48-49 Transportation & Warehousing	3,524,553	13,740,413	12,571,369	29,836,336
44-45 Retail trade	799,190,400	7,037,701	77,051,544	883,279,616
51 Information	0	16,401,876	15,905,358	32,307,234
52 Finance & insurance	0	14,536,411	41,852,348	56,388,760
53 Real estate & rental	0	33,635,188	36,749,280	70,384,472
54 Professional, scientific & tech services	0	27,540,896	29,867,646	57,408,540
55 Management of companies	0	29,504,566	6,590,364	36,094,928
56 Administrative & waste services	0	17,691,438	12,717,445	30,408,882
61 Educational services	0	194,090	6,087,454	6,281,544
62 Health & social services	0	9,855	72,359,624	72,369,480
71 Arts, entertainment & recreation	0	1,783,230	7,808,222	9,591,451
72 Accommodation & food services	0	3,434,465	22,425,794	25,860,258
81 Other services	0	2,883,078	18,815,926	21,699,002
92 Government & non-NAICS establish.	0	7,001,183	77,693,928	84,695,112
Total	1,025,579,235	207,172,017	534,319,569	1,767,070,774

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

Table A.10. Economic Impact of Consumer Spending on Sports/Recreation Apparel and Equipment

Total Labor Income (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	105,968	1,113,439	1,219,408
21 Mining	0	84,094	159,023	243,117
22 Utilities	0	2,923,051	3,790,051	6,713,102
23 Construction	0	2,928,090	27,420,086	30,348,176
31-33 Manufacturing	18,036,490	4,554,721	10,699,254	33,290,464
42 Wholesale Trade	108,900,872	6,986,545	18,474,960	134,362,384
48-49 Transportation & Warehousing	2,642,043	11,357,987	10,149,244	24,149,276
44-45 Retail trade	463,788,256	4,287,592	46,502,356	514,578,208
51 Information	0	10,654,682	7,979,463	18,634,146
52 Finance & insurance	0	7,772,954	24,688,396	32,461,350
53 Real estate & rental	0	7,522,490	9,070,554	16,593,044
54 Professional, scientific & tech services	0	22,795,946	25,502,954	48,298,900
55 Management of companies	0	20,159,068	4,502,883	24,661,950
56 Administrative & waste services	0	14,441,142	10,601,067	25,042,210
61 Educational services	0	179,523	5,552,967	5,732,490
62 Health & social services	0	8,685	64,254,172	64,262,856
71 Arts, entertainment & recreation	0	1,490,769	5,558,381	7,049,150
72 Accommodation & food services	0	2,351,856	17,469,118	19,820,974
81 Other services	0	2,497,429	17,476,356	19,973,786
92 Government & non-NAICS establish.	<u>0</u>	<u>1,603,458</u>	<u>3,541,005</u>	<u>5,144,463</u>
Total	593,367,661	124,706,049	314,505,727	1,032,579,452

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

Table A.11. Economic Impact of Consumer Spending on Sports/Recreation Apparel and Equipment
Total Capital Income (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	58,057	989,400	1,047,456
21 Mining	0	82,118	146,906	229,025
22 Utilities	0	5,133,432	6,387,036	11,520,468
23 Construction	0	59,600	3,468,861	3,528,461
31-33 Manufacturing	7,568,483	1,481,379	5,416,725	14,466,587
42 Wholesale Trade	42,662,628	2,737,025	7,237,687	52,637,336
48-49 Transportation & Warehousing	724,542	2,004,556	1,814,192	4,543,289
44-45 Retail trade	181,281,808	1,401,921	15,602,100	198,285,840
51 Information	0	4,721,047	6,465,657	11,186,703
52 Finance & insurance	0	6,025,214	15,256,559	21,281,772
53 Real estate & rental	0	21,448,444	22,582,790	44,031,236
54 Professional, scientific & tech services	0	4,292,524	3,756,049	8,048,573
55 Management of companies	0	8,875,287	1,982,452	10,857,738
56 Administrative & waste services	0	2,805,871	1,758,865	4,564,735
61 Educational services	0	11,312	420,155	431,467
62 Health & social services	0	995	7,215,333	7,216,327
71 Arts entertainment & recreation	0	120,123	1,391,488	1,511,610
72 Accommodation & food services	0	668,585	2,909,819	3,578,403
81 Other services	0	315,412	928,940	1,244,352
92 Government & non-NAICS establish.	<u>0</u>	<u>5,389,624</u>	<u>63,403,480</u>	<u>68,793,104</u>
Total	232,237,461	67,632,523	169,134,489	469,004,481

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.12. State and Local Government Revenue Impact of Consumer Spending on Sports/Recreation Apparel and Equipment

Source	Amount \$
Sales Taxes	116,265,003
Property Taxes	89,241,154
Other Indirect Business Taxes	27,145,717
Payroll Taxes	1,798,368
Licenses, Fines and Fees	8,551,888
Corporate and Dividend Taxes	<u>17,698,182</u>
Total	260,700,312

**Table A.13. Economic Impact of Local Government Parks and Recreation Expenditures
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	15,205,768	3,279,989	18,485,756
21 Mining	0	732,194	1,146,425	1,878,619
22 Utilities	0	4,759,243	14,197,498	18,956,740
23 Construction	240,576,768	2,557,821	47,821,968	290,956,544
31-33 Manufacturing	0	21,204,182	34,652,308	55,856,492
42 Wholesale Trade	0	25,388,280	36,335,308	61,723,592
48-49 Transportation & Warehousing	0	20,002,744	19,972,712	39,975,456
44-45 Retail trade	0	65,809,904	80,739,016	146,548,912
51 Information	0	16,517,225	23,599,238	40,116,460
52 Finance & insurance	0	21,096,994	63,913,800	85,010,792
53 Real estate & rental	0	30,410,214	43,056,364	73,466,576
54 Professional, scientific & tech services	0	35,725,584	30,325,400	66,050,984
55 Management of companies	0	11,332,962	7,454,322	18,787,284
56 Administrative & waste services	0	29,913,000	15,943,752	45,856,752
61 Educational services	0	1,072,449	8,324,546	9,396,995
62 Health & social services	0	13,245	95,864,880	95,878,128
71 Arts, entertainment & recreation	0	1,940,143	10,577,646	12,517,789
72 Accommodation & food services	0	6,498,282	35,890,096	42,388,380
81 Other services	197,878	9,427,250	31,927,516	41,552,644
92 Government & non-NAICS establish.	<u>700,864,448</u>	<u>7,533,667</u>	<u>80,696,864</u>	<u>789,094,979</u>
Total	941,639,094	327,141,150	685,719,648	1,954,499,831

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

Table A.14. Economic Impact of Local Government Parks and Recreation Expenditures

Total Employment (2004, Full and Part-time Employment Positions)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	177	45	222
21 Mining	0	4	6	9
22 Utilities	0	9	27	36
23 Construction	2,880	32	418	3,329
31-33 Manufacturing	0	95	164	258
42 Wholesale Trade	0	181	259	439
48-49 Transportation & Warehousing	0	206	194	400
44-45 Retail trade	0	1,121	1,375	2,496
51 Information	0	87	109	197
52 Finance & insurance	0	126	377	503
53 Real estate & rental	0	163	295	457
54 Professional, scientific & tech services	0	421	356	777
55 Management of companies	0	72	47	119
56 Administrative & waste services	0	637	306	943
61 Educational services	0	17	164	180
62 Health & social services	0	0	1,236	1,236
71 Arts, entertainment & recreation	0	42	176	218
72 Accommodation & food services	0	139	796	935
81 Other services	5	117	697	819
92 Government & non-NAICS establish.	<u>17,511</u>	<u>30</u>	<u>58</u>	<u>17,600</u>
Total	20,396	3,673	7,102	31,171

Note: Employment positions include sole proprietors. Direct employment includes stadium and concession employees.

Table A.15. Economic Impact of Local Government Parks and Recreation Expenditures
Total Gross State Product (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	12,807,236	1,751,163	14,558,401
21 Mining	0	220,495	272,284	492,778
22 Utilities	0	3,278,893	9,699,131	12,978,024
23 Construction	123,833,272	1,257,466	18,374,600	143,465,344
31-33 Manufacturing	0	7,441,893	12,358,896	19,800,788
42 Wholesale Trade	0	18,381,018	26,306,624	44,687,640
48-49 Transportation & Warehousing	0	10,265,323	9,843,768	20,109,092
44-45 Retail trade	0	49,489,576	60,697,908	110,187,488
51 Information	0	8,764,131	12,612,871	21,377,002
52 Finance & insurance	0	12,338,074	33,629,168	45,967,240
53 Real estate & rental	0	18,458,070	28,787,056	47,245,124
54 Professional, scientific & tech services	0	26,552,504	22,315,562	48,868,068
55 Management of companies	0	7,853,750	5,165,850	13,019,599
56 Administrative & waste services	0	19,250,606	9,940,137	29,190,743
61 Educational services	0	629,328	4,932,599	5,561,927
62 Health & social services	0	5,508	58,516,324	58,521,832
71 Arts, entertainment & recreation	0	1,268,371	6,307,978	7,576,349
72 Accommodation & food services	0	3,536,660	18,141,680	21,678,340
81 Other services	104,444	3,593,922	15,154,240	18,852,606
92 Government & non-NAICS establish.	<u>433,320,192</u>	<u>5,089,416</u>	<u>62,849,956</u>	<u>501,259,564</u>
Total	557,257,908	210,482,238	417,657,795	1,185,397,962

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

Table A.16. Economic Impact of Local Government Parks and Recreation Expenditures
Total Labor Income (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	6,412,721	887,717	7,300,438
21 Mining	0	107,820	124,323	232,143
22 Utilities	0	1,020,790	3,029,934	4,050,724
23 Construction	115,582,512	1,216,518	16,154,058	132,953,088
31-33 Manufacturing	0	5,368,694	7,876,755	13,245,448
42 Wholesale Trade	0	10,172,658	14,558,947	24,731,606
48-49 Transportation & Warehousing	0	8,399,877	7,955,111	16,354,988
44-45 Retail trade	0	30,150,530	36,625,460	66,775,988
51 Information	0	5,204,601	6,313,142	11,517,742
52 Finance & insurance	0	6,736,979	19,849,610	26,586,588
53 Real estate & rental	0	4,658,869	7,122,166	11,781,034
54 Professional, scientific & tech services	0	22,232,228	18,891,456	41,123,684
55 Management of companies	0	5,366,094	3,529,580	8,895,673
56 Administrative & waste services	0	16,821,898	8,274,226	25,096,124
61 Educational services	0	447,482	4,497,899	4,945,381
62 Health & social services	0	4,810	51,953,328	51,958,140
71 Arts, entertainment & recreation	0	1,043,229	4,489,007	5,532,236
72 Accommodation & food services	0	2,563,074	14,142,470	16,705,545
81 Other services	98,047	3,173,305	14,080,057	17,351,408
92 Government & non-NAICS establish.	<u>418,910,832</u>	<u>1,437,948</u>	<u>2,831,578</u>	<u>423,180,358</u>
Total	534,591,391	132,540,123	243,186,822	910,318,336

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

Table A.17. Economic Impact of Local Government Parks and Recreation Expenditures

Total Capital Income (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	6,165,052	791,746	6,956,797
21 Mining	0	91,858	115,647	207,505
22 Utilities	0	1,731,315	5,104,430	6,835,745
23 Construction	7,048,438	25,737	2,006,265	9,080,439
31-33 Manufacturing	0	1,916,904	4,178,247	6,095,151
42 Wholesale Trade	0	3,985,205	5,703,563	9,688,768
48-49 Transportation & Warehousing	0	1,365,630	1,411,004	2,776,634
44-45 Retail trade	0	9,858,517	12,294,665	22,153,182
51 Information	0	2,848,248	5,141,128	7,989,376
52 Finance & insurance	0	5,004,510	12,247,710	17,252,220
53 Real estate & rental	0	11,676,814	17,675,188	29,352,002
54 Professional, scientific & tech services	0	3,871,699	2,951,202	6,822,901
55 Management of companies	0	2,362,491	1,553,943	3,916,434
56 Administrative & waste services	0	2,047,619	1,384,559	3,432,178
61 Educational services	0	150,067	341,804	491,870
62 Health & social services	0	597	5,843,476	5,844,073
71 Arts, entertainment & recreation	0	109,682	1,125,254	1,234,936
72 Accommodation & food services	0	588,637	2,346,511	2,935,148
81 Other services	3,384	332,005	743,738	1,079,127
92 Government & non-NAICS establish.	<u>0</u>	<u>3,648,194</u>	<u>51,300,764</u>	<u>54,948,958</u>
Total	7,052,822	57,780,778	134,260,842	199,093,444

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.18. State and Local Government Revenue Impact of Local Government Parks and Recreation Expenditures

Source	Amount \$
Sales Taxes	33,713,277
Property Taxes	26,218,439
Other Indirect Business Taxes	7,871,426
Payroll Taxes	1,481,056
Licenses, Fines and Fees	6,041,118
Corporate and Dividend Taxes	<u>9,348,780</u>
Total	84,674,096

Table A.19. Economic Impact of Sport Fishing, Hunting and Wildlife-Associated Recreation
Total Economic Output (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	6,849,607	5,292,248	12,141,855
21 Mining	0	2,153,621	1,854,542	4,008,163
22 Utilities	0	31,968,274	22,862,328	54,830,604
23 Construction	0	13,823,432	93,511,912	107,335,344
31-33 Manufacturing	0	70,968,040	58,069,868	129,037,904
42 Wholesale Trade	0	63,170,200	59,002,660	122,172,864
48-49 Transportation & Warehousing	223,332,032	46,420,628	32,569,302	302,321,952
44-45 Retail trade	228,244,896	15,417,804	131,133,880	374,796,576
51 Information	0	47,664,300	38,161,084	85,825,384
52 Finance & insurance	0	39,929,640	102,551,616	142,481,248
53 Real estate & rental	0	92,682,512	70,171,280	162,853,792
54 Professional, scientific & tech services	0	56,726,948	50,753,116	107,480,064
55 Management of companies	0	19,848,428	12,142,642	31,991,068
56 Administrative & waste services	0	39,747,432	25,999,522	65,746,952
61 Educational services	0	455,849	13,300,003	13,755,851
62 Health & social services	0	24,096	153,373,200	153,397,296
71 Arts, entertainment & recreation	0	8,407,381	16,925,920	25,333,300
72 Accommodation & food services	1,398,251,520	16,873,086	57,367,424	1,472,492,032
81 Other services	0	14,627,653	51,231,968	65,859,624
92 Government & non-NAICS establish.	0	26,991,858	129,069,016	156,060,880
Total	1,849,828,448	614,750,789	1,125,343,531	3,589,922,753

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

Table A.20. Economic Impact of Sport Fishing, Hunting and Wildlife-Associated Recreation

Total Employment (2004, Full and Part-time Employment Positions)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	92	72	164
21 Mining	0	11	9	20
22 Utilities	0	58	44	102
23 Construction	0	171	813	984
31-33 Manufacturing	0	346	275	621
42 Wholesale Trade	0	450	420	869
48-49 Transportation & Warehousing	1,534	478	316	2,328
44-45 Retail trade	5,120	263	2,233	7,616
51 Information	0	265	177	441
52 Finance & insurance	0	242	605	847
53 Real estate & rental	0	512	479	991
54 Professional, scientific & tech services	0	681	598	1,279
55 Management of companies	0	126	77	202
56 Administrative & waste services	0	657	499	1,156
61 Educational services	0	8	261	269
62 Health & social services	0	0	1,976	1,977
71 Arts, entertainment & recreation	0	236	282	517
72 Accommodation & food services	28,421	370	1,272	30,063
81 Other services	0	206	1,115	1,321
92 Government & non NAICS establishments	<u>0</u>	<u>90</u>	<u>94</u>	<u>184</u>
Total	35,075	5,260	11,618	51,952

Note: Employment positions include sole proprietors.

**Table A.21. Economic Impact of Sport Fishing, Hunting and Wildlife-Associated Recreation
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	2,622,112	2,820,986	5,443,098
21 Mining	0	456,507	443,041	899,548
22 Utilities	0	22,023,154	15,619,518	37,642,672
23 Construction	0	6,809,156	35,815,132	42,624,288
31-33 Manufacturing	0	23,518,294	20,695,040	44,213,336
42 Wholesale Trade	0	45,734,984	42,717,700	88,452,688
48-49 Transportation & Warehousing	100,852,880	24,918,826	16,044,752	141,816,464
44-45 Retail trade	165,697,440	11,594,317	98,584,256	275,876,032
51 Information	0	23,386,210	20,405,818	43,792,024
52 Finance & insurance	0	24,564,630	53,988,896	78,553,528
53 Real estate & rental	0	67,312,704	46,910,548	114,223,240
54 Professional, scientific & tech services	0	41,582,904	37,404,164	78,987,064
55 Management of companies	0	13,754,972	8,414,859	22,169,830
56 Administrative & waste services	0	22,635,214	16,219,148	38,854,364
61 Educational services	0	246,165	7,880,128	8,126,292
62 Health & social services	0	10,403	93,591,920	93,602,320
71 Arts, entertainment & recreation	0	5,373,562	10,095,041	15,468,602
72 Accommodation & food services	819,869,248	8,743,023	29,010,516	857,622,784
81 Other services	0	5,838,304	24,295,556	30,133,860
92 Government & non NAICS establishments	0	18,838,448	100,504,856	119,343,304
Total	1,086,419,568	369,963,888	681,461,875	2,137,845,338

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

Table A.22. Economic Impact of Sport Fishing, Hunting and Wildlife-Associated Recreation
Total Labor Income (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	1,219,759	1,431,672	2,651,431
21 Mining	0	198,724	202,829	401,553
22 Utilities	0	6,741,647	4,878,788	11,620,434
23 Construction	0	6,604,166	31,445,104	38,049,272
31-33 Manufacturing	0	14,722,106	13,320,744	28,042,850
42 Wholesale Trade	0	25,311,238	23,641,374	48,952,608
48-49 Transportation & Warehousing	87,546,400	20,973,298	12,958,712	121,478,408
44-45 Retail trade	111,051,632	7,063,594	59,493,084	177,608,304
51 Information	0	14,799,467	10,227,564	25,027,030
52 Finance & insurance	0	13,231,780	31,855,664	45,087,444
53 Real estate & rental	0	12,785,261	11,589,837	24,375,100
54 Professional, scientific & tech services	0	34,529,484	31,829,238	66,358,720
55 Management of companies	0	9,398,119	5,749,473	15,147,593
56 Administrative & waste services	0	18,919,350	13,512,203	32,431,556
61 Educational services	0	237,171	7,187,158	7,424,329
62 Health & social services	0	9,298	83,102,600	83,111,904
71 Arts, entertainment & recreation	0	4,712,739	7,185,345	11,898,084
72 Accommodation & food services	551,189,888	6,658,382	22,605,518	580,453,760
81 Other services	0	5,166,522	22,569,010	27,735,530
92 Government & non NAICS establishments	0	4,389,103	4,558,678	8,947,780
Total	749,787,920	207,671,208	399,344,593	1,356,803,689

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

Table A.23. Economic Impact of Sport Fishing, Hunting and Wildlife-Associated Recreation

Total Capital Income (2004 \$)

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	1,261,554	1,274,133	2,535,687
21 Mining	0	197,508	187,907	385,415
22 Utilities	0	11,694,992	8,220,687	19,915,679
23 Construction	0	122,294	3,953,110	4,075,405
31-33 Manufacturing	0	7,990,599	6,871,136	14,861,734
42 Wholesale Trade	0	9,915,843	9,261,663	19,177,506
48-49 Transportation & Warehousing	-2,637,537	1,913,369	2,309,056	1,584,888
44-45 Retail trade	20,438,752	2,309,645	19,964,912	42,713,312
51 Information	0	7,048,241	8,304,409	15,352,649
52 Finance & insurance	0	10,110,586	19,673,250	29,783,834
53 Real estate & rental	0	46,252,420	28,817,154	75,069,576
54 Professional, scientific & tech services	0	6,346,932	4,800,578	11,147,509
55 Management of companies	0	4,137,642	2,531,279	6,668,921
56 Administrative & waste services	0	3,001,339	2,249,712	5,251,051
61 Educational services	0	6,360	544,798	551,157
62 Health & social services	0	930	9,338,224	9,339,154
71 Arts, entertainment & recreation	0	186,535	1,799,763	1,986,298
72 Accommodation & food services	166,686,576	1,227,439	3,759,235	171,673,248
81 Other services	0	523,646	1,196,515	1,720,160
92 Government & non NAICS establishments	0	14,430,546	82,026,056	96,456,600
Total	184,487,791	128,678,419	217,083,574	530,249,779

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.24. State and Local Government Revenue Impact of Sport Fishing, Hunting and Wildlife-Associated Recreation

Source	Amount \$
Sales Taxes	110,105,091
Property Taxes	84,740,910
Other Indirect Business Taxes	25,707,491
Payroll Taxes	2,304,941
Licenses, Fines and Fees	10,477,081
Corporate and Dividend Taxes	20,052,249
Total	253,387,763

**Table A.25. Economic Impact of Recreational Golf and Golf Courses
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	20,941,656	23,729,768	44,671,424
21 Mining	0	11,195,695	8,314,140	19,509,834
22 Utilities	0	172,421,152	102,524,824	274,945,952
23 Construction	0	105,042,440	414,564,960	519,607,424
31-33 Manufacturing	0	226,723,472	259,753,376	486,476,832
42 Wholesale Trade	0	195,865,344	264,451,568	460,316,928
48-49 Transportation & Warehousing	604,692,672	194,202,384	145,937,360	944,832,448
44-45 Retail trade	0	62,921,676	587,737,984	650,659,648
51 Information	0	261,361,120	171,085,200	432,446,304
52 Finance & insurance	0	236,767,968	459,994,016	696,761,984
53 Real estate & rental	0	494,575,776	314,436,448	809,012,224
54 Professional, scientific & tech services	0	340,267,360	227,043,056	567,310,464
55 Management of companies	0	111,270,752	54,412,760	165,683,504
56 Administrative & waste services	0	296,171,648	116,499,224	412,670,880
61 Educational services	0	24,993,842	59,673,744	84,667,584
62 Health & social services	0	350,741	688,083,840	688,434,624
71 Arts, entertainment & recreation	4,585,453,568	78,864,664	75,935,120	4,740,253,184
72 Accommodation & food services	3,400,877,056	73,539,960	257,384,544	3,731,801,600
81 Other services	0	108,982,248	229,799,792	338,782,016
92 Government & non-NAICS establish.	0	153,132,464	579,057,792	732,190,272
Total	8,591,023,296	3,169,592,362	5,040,419,516	16,801,035,130

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

**Table A.26. Economic Impact of Recreational Golf and Golf Courses
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	313	324	637
21 Mining	0	56	42	97
22 Utilities	0	321	196	518
23 Construction	0	1,306	3,606	4,911
31-33 Manufacturing	0	1,169	1,230	2,399
42 Wholesale Trade	0	1,394	1,882	3,276
48-49 Transportation & Warehousing	2,885	2,107	1,416	6,408
44-45 Retail trade	0	1,072	10,010	11,082
51 Information	0	1,444	792	2,236
52 Finance & insurance	0	1,462	2,713	4,175
53 Real estate & rental	0	2,964	2,147	5,111
54 Professional, scientific & tech services	0	4,104	2,673	6,777
55 Management of companies	0	703	344	1,047
56 Administrative & waste services	0	5,203	2,237	7,440
61 Educational services	0	383	1,172	1,555
62 Health & social services	0	3	8,867	8,870
71 Arts, entertainment & recreation	54,484	1,852	1,264	57,599
72 Accommodation & food services	64,981	1,613	5,708	72,302
81 Other services	0	1,401	5,003	6,404
92 Government & non-NAICS establish.	<u>0</u>	<u>510</u>	<u>422</u>	<u>931</u>
Total	122,350	29,378	52,046	203,775

Note: Employment positions include sole proprietors.

**Table A.27. Economic Impact of Recreational Golf and Golf Courses
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	8,762,109	12,650,250	21,412,358
21 Mining	0	2,418,038	1,985,464	4,403,502
22 Utilities	0	119,640,136	70,044,584	189,684,720
23 Construction	0	51,752,900	158,806,128	210,559,024
31-33 Manufacturing	0	78,268,200	92,575,768	170,843,968
42 Wholesale Trade	0	141,805,760	191,461,920	333,267,680
48-49 Transportation & Warehousing	222,520,848	109,384,336	71,895,848	403,801,024
44-45 Retail trade	0	47,317,604	441,851,424	489,169,024
51 Information	0	127,978,056	91,481,168	219,459,232
52 Finance & insurance	0	142,830,848	242,157,792	384,988,640
53 Real estate & rental	0	345,968,256	210,206,960	556,175,232
54 Professional scientific & tech services	0	248,722,992	167,311,040	416,034,048
55 Management of companies	0	77,110,704	37,708,076	114,818,776
56 Administrative & waste services	0	176,508,704	72,672,328	249,181,040
61 Educational services	0	14,708,097	35,356,316	50,064,416
62 Health & social services	0	146,011	419,892,928	420,038,944
71 Arts, entertainment & recreation	2,539,920,640	41,825,540	45,289,236	2,627,035,648
72 Accommodation & food services	2,168,552,704	38,108,676	130,154,880	2,336,816,128
81 Other services	0	41,550,272	108,983,392	150,533,664
92 Government & non-NAICS establish.	0	106,736,984	450,912,576	557,649,536
Total	4,930,994,192	1,921,544,224	3,053,398,078	9,905,936,604

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

**Table A.28. Economic Impact of Recreational Golf and Golf Courses
Total Labor Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	4,407,988	6,419,625	10,827,613
21 Mining	0	1,060,392	908,812	1,969,204
22 Utilities	0	36,816,436	21,878,746	58,695,184
23 Construction	0	50,301,836	139,439,216	189,741,040
31-33 Manufacturing	0	51,924,888	59,551,568	111,476,456
42 Wholesale Trade	0	78,479,952	105,961,296	184,441,248
48-49 Transportation & Warehousing	179,566,896	93,600,776	58,069,624	331,237,312
44-45 Retail trade	0	28,827,300	266,644,112	295,471,392
51 Information	0	82,248,664	45,847,128	128,095,800
52 Finance & insurance	0	79,458,424	142,886,336	222,344,752
53 Real estate & rental	0	73,363,696	51,938,924	125,302,632
54 Professional scientific & tech services	0	205,073,504	142,328,288	347,401,792
55 Management of companies	0	52,686,076	25,764,136	78,450,216
56 Administrative & waste services	0	147,245,504	60,540,224	207,785,728
61 Educational services	0	10,337,658	32,246,692	42,584,348
62 Health & social services	0	127,601	372,831,200	372,958,784
71 Arts, entertainment & recreation	1,641,423,488	34,933,276	32,235,056	1,708,591,744
72 Accommodation & food services	1,339,438,080	29,014,820	101,421,888	1,469,874,688
81 Other services	0	34,901,236	101,239,848	136,141,088
92 Government & non-NAICS establish.	0	24,957,506	20,443,450	45,400,956
Total	3,160,428,464	1,119,767,532	1,788,596,169	6,068,791,977

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

**Table A.29. Economic Impact of Recreational Golf and Golf Courses
Total Capital Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	3,942,670	5,714,020	9,656,690
21 Mining	0	1,044,125	842,170	1,886,295
22 Utilities	0	63,534,096	36,864,916	100,399,024
23 Construction	0	818,660	17,518,096	18,336,756
31-33 Manufacturing	0	24,075,592	30,771,808	54,847,400
42 Wholesale Trade	0	30,745,034	41,511,032	72,256,064
48-49 Transportation & Warehousing	18,063,156	8,732,088	10,344,139	37,139,384
44-45 Retail trade	0	9,425,852	89,483,192	98,909,040
51 Information	0	37,767,772	37,233,240	75,001,016
52 Finance & insurance	0	56,126,632	88,237,856	144,364,496
53 Real estate & rental	0	227,276,576	129,126,080	356,402,656
54 Professional scientific & tech services	0	39,623,080	21,513,946	61,137,028
55 Management of companies	0	23,195,718	11,342,990	34,538,708
56 Administrative & waste services	0	24,119,262	10,082,873	34,202,136
61 Educational services	0	3,608,720	2,444,743	6,053,463
62 Health & social services	0	15,736	41,897,520	41,913,252
71 Arts, entertainment & recreation	590,438,720	3,893,525	8,074,618	602,406,848
72 Accommodation & food services	524,525,888	5,361,969	16,863,696	546,751,552
81 Other services	0	5,552,910	5,366,040	10,918,949
92 Government & non-NAICS establish.	0	81,675,688	368,010,912	449,686,592
Total	1,133,027,764	650,535,703	973,243,885	2,756,807,349

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.30. State and Local Government Revenue Impact of Recreational Golf and Golf Courses

Source	Amount \$
Sales Taxes	477,576,345
Property Taxes	367,686,997
Other Indirect Business Taxes	111,505,200
Payroll Taxes	10,390,208
Licenses, Fines and Fees	46,766,854
Corporate and Dividend Taxes	104,602,439
Total	1,118,528,043

**Table A.31. Economic Impact of Professional Team Sports (MLB, NFL, NBA and NHL)
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	375,653	3,946,746	4,322,399
21 Mining	0	253,888	1,381,415	1,635,302
22 Utilities	0	4,283,238	17,065,514	21,348,754
23 Construction	0	2,853,070	64,136,836	66,989,904
31-33 Manufacturing	0	4,977,823	42,566,920	47,544,744
42 Wholesale Trade	0	4,019,414	43,873,912	47,893,324
48-49 Transportation & Warehousing	0	4,602,067	24,170,592	28,772,658
44-45 Retail trade	0	2,284,818	97,500,824	99,785,640
51 Information	0	9,305,602	28,430,116	37,735,720
52 Finance & insurance	0	9,559,283	76,676,280	86,235,560
53 Real estate & rental	7,326,462	18,803,832	52,091,396	78,221,688
54 Professional- scientific & tech services	0	12,433,981	37,224,920	49,658,904
55 Management of companies	0	2,967,718	9,015,998	11,983,715
56 Administrative & waste services	0	10,305,785	19,294,912	29,600,696
61 Educational services	0	53,825	9,962,584	10,016,410
62 Health & social services	0	1,052,031	114,820,744	115,872,768
71 Arts- entertainment & recreation	828,414,912	57,910,572	12,670,092	898,995,584
72 Accommodation & food services	70,952,424	2,113,163	42,968,064	116,033,656
81 Other services	0	2,229,280	38,301,048	40,530,328
92 Government & non-NAICS establish.	0	4,001,698	96,640,312	100,642,008
Out-of-State Payments	<u>199,717,648</u>	<u>0</u>	<u>0</u>	<u>199,717,648</u>
Total	1,106,411,446	154,386,738	832,739,225	2,093,537,410

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

**Table A.32. Economic Impact of Professional Team Sports (MLB, NFL, NBA and NHL)
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	6	54	60
21 Mining	0	1	7	8
22 Utilities	0	8	33	41
23 Construction	0	35	559	594
31-33 Manufacturing	0	27	201	229
42 Wholesale Trade	0	29	312	341
48-49 Transportation & Warehousing	0	55	234	290
44-45 Retail trade	0	39	1,661	1,700
51 Information	0	47	132	178
52 Finance & insurance	0	59	452	511
53 Real estate & rental	48	83	356	486
54 Professional, scientific & tech services	0	156	438	594
55 Management of companies	0	19	57	76
56 Administrative & waste services	0	183	370	553
61 Educational services	0	1	196	197
62 Health & social services	0	9	1,480	1,488
71 Arts, entertainment & recreation	6,163	1,247	211	7,621
72 Accommodation & food services	1,292	43	953	2,288
81 Other services	0	30	835	864
92 Government & non-NAICS establish.	<u>0</u>	<u>16</u>	<u>70</u>	<u>86</u>
Total	18,948	2,092	8,609	29,649

Note: Employment positions include sole proprietors. Direct employment includes stadium and concession employees.

**Table A.33. Economic Impact of Professional Team Sports (MLB, NFL, NBA and NHL)
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	143,058	2,105,308	2,248,367
21 Mining	0	54,654	329,132	383,786
22 Utilities	0	2,977,124	11,658,821	14,635,944
23 Construction	0	1,407,198	24,596,914	26,004,114
31-33 Manufacturing	0	1,801,777	15,175,284	16,977,062
42 Wholesale Trade	0	2,910,040	31,764,542	34,674,584
48-49 Transportation & Warehousing	0	2,626,545	11,909,747	14,536,291
44-45 Retail trade	0	1,718,202	73,299,304	75,017,504
51 Information	0	4,571,739	15,198,973	19,770,712
52 Finance & insurance	0	5,967,865	40,356,568	46,324,432
53 Real estate & rental	2,583,025	14,341,322	34,825,756	51,750,100
54 Professional, scientific & tech services	0	8,565,101	27,415,518	35,980,620
55 Management of companies	0	2,056,630	6,248,092	8,304,722
56 Administrative & waste services	0	6,149,509	12,033,343	18,182,852
61 Educational services	0	29,402	5,902,939	5,932,341
62 Health & social services	0	432,796	70,076,408	70,509,208
71 Arts, entertainment & recreation	685,866,688	44,836,620	7,556,354	738,259,712
72 Accommodation & food services	47,931,572	1,229,417	21,724,228	70,885,224
81 Other services	0	875,207	18,170,646	19,045,854
92 Government & non-NAICS establish.	0	2,710,333	75,259,560	77,969,896
Total	736,381,285	105,404,538	505,607,436	1,347,393,324

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

**Table A.34. Economic Impact of Professional Team Sports (MLB, NFL, NBA and NHL)
Total Labor Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	73,887	1,067,897	1,141,784
21 Mining	0	23,977	150,497	174,473
22 Utilities	0	915,155	3,641,870	4,557,025
23 Construction	0	1,366,588	21,607,548	22,974,136
31-33 Manufacturing	0	1,200,912	9,724,559	10,925,471
42 Wholesale Trade	0	1,610,512	17,579,538	19,190,050
48-49 Transportation & Warehousing	0	2,188,886	9,621,606	11,810,491
44-45 Retail trade	0	1,046,780	44,231,948	45,278,728
51 Information	0	2,696,737	7,613,129	10,309,866
52 Finance & insurance	0	3,223,711	23,815,824	27,039,536
53 Real estate & rental	1,720,606	2,322,348	8,609,557	12,652,510
54 Professional, scientific & tech services	0	7,126,725	23,275,164	30,401,888
55 Management of companies	0	1,405,198	4,269,024	5,674,222
56 Administrative & waste services	0	5,025,897	10,021,168	15,047,065
61 Educational services	0	27,266	5,383,276	5,410,542
62 Health & social services	0	375,356	62,219,844	62,595,200
71 Arts, entertainment & recreation	616,240,064	38,054,984	5,377,956	659,673,024
72 Accommodation & food services	27,926,386	832,895	16,931,514	45,690,796
81 Other services	0	773,772	16,880,862	17,654,634
92 Government & non-NAICS establish.	0	794,361	3,403,049	4,197,410
Total	645,887,056	71,085,945	295,425,828	1,012,398,851

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

**Table A.35. Economic Impact of Professional Team Sports (MLB, NFL, NBA and NHL)
Total Capital Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	61,660	951,340	1,013,000
21 Mining	0	23,562	139,685	163,247
22 Utilities	0	1,582,216	6,135,970	7,718,185
23 Construction	0	23,496	2,702,830	2,726,326
31-33 Manufacturing	0	553,135	5,079,878	5,633,013
42 Wholesale Trade	0	630,928	6,886,899	7,517,828
48-49 Transportation & Warehousing	0	350,050	1,710,872	2,060,922
44-45 Retail trade	0	342,272	14,845,601	15,187,874
51 Information	0	1,576,448	6,189,919	7,766,367
52 Finance & insurance	0	2,442,753	14,702,203	17,144,956
53 Real estate & rental	758,790	10,616,299	21,388,716	32,763,806
54 Professional, scientific & tech services	0	1,238,166	3,566,758	4,804,924
55 Management of companies	0	618,656	1,879,493	2,498,149
56 Administrative & waste services	0	972,675	1,672,318	2,644,993
61 Educational services	0	1,654	408,579	410,233
62 Health & social services	0	49,297	6,994,800	7,044,097
71 Arts, entertainment & recreation	-7,852,099	2,007,205	1,347,502	-4,497,391
72 Accommodation & food services	12,779,280	245,680	2,812,526	15,837,486
81 Other services	0	80,687	893,453	974,140
92 Government & non-NAICS establish.	0	1,913,368	61,425,904	63,339,272
Total	5,685,972	25,330,208	161,735,243	192,751,424

Note: "Capital income" represents corporate profits, interest and dividends.

**Table A.36. State and Local Government Revenue Impact of
Professional Team Sports (MLB, NFL, NBA and NHL)**

Source	Amount \$
Sales Taxes	63,061,085
Property Taxes	48,683,950
Other Indirect Business Taxes	14,723,591
Payroll Taxes	1,502,332
Licenses, Fines and Fees	7,563,252
Corporate and Dividend Taxes	<u>7,396,037</u>
Total	142,930,247

**Table A.37. Economic Impact of Pari-Mutuel Sports
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	448,489,440	12,268,712	3,824,355	464,582,528
21 Mining	0	1,643,290	1,331,313	2,974,603
22 Utilities	0	11,348,220	16,475,300	27,823,518
23 Construction	186,760,624	7,224,273	56,486,184	250,471,088
31-33 Manufacturing	131,149,456	47,352,128	40,394,956	218,896,544
42 Wholesale Trade	0	40,814,904	42,182,544	82,997,448
48-49 Transportation & Warehousing	49,009,900	37,184,996	23,237,980	109,432,880
44-45 Retail trade	0	16,992,638	93,739,808	110,732,440
51 Information	0	19,674,796	27,395,298	47,070,096
52 Finance & insurance	99,179,648	34,610,616	74,126,272	207,916,528
53 Real estate & rental	0	35,368,076	50,004,364	85,372,440
54 Professional, scientific & tech services	79,016,000	46,824,744	35,315,544	161,156,288
55 Management of companies	0	11,953,806	8,659,103	20,612,910
56 Administrative & waste services	0	20,063,442	18,516,704	38,580,148
61 Educational services	0	183,363	9,651,604	9,834,967
62 Health & social services	0	908,780	111,157,136	112,065,920
71 Arts, entertainment & recreation	293,442,912	6,762,351	12,266,172	312,471,456
72 Accommodation & food services	0	4,769,143	41,612,392	46,381,536
81 Other services	0	10,944,279	37,031,136	47,975,416
92 Government & non-NAICS establish.	<u>0</u>	<u>11,050,977</u>	<u>93,570,064</u>	<u>104,621,040</u>
Total	1,287,047,980	377,943,534	796,978,229	2,461,969,794

*Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.
Includes the impact from the care of racehorses.*

**Table A.38. Economic Impact of Pari-Mutuel Sports
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	17,192	198	51	17,442
21 Mining	0	8	7	15
22 Utilities	0	21	32	53
23 Construction	1,253	90	493	1,836
31-33 Manufacturing	672	237	191	1,100
42 Wholesale Trade	0	290	300	591
48-49 Transportation & Warehousing	495	366	225	1,086
44-45 Retail trade	0	289	1,597	1,886
51 Information	0	106	127	233
52 Finance & insurance	923	229	437	1,589
53 Real estate & rental	0	208	342	550
54 Professional, scientific & tech services	1,252	565	413	2,230
55 Management of companies	0	76	55	130
56 Administrative & waste services	0	392	355	747
61 Educational services	0	3	190	193
62 Health & social services	0	7	1,433	1,440
71 Arts, entertainment & recreation	3,413	141	204	3,758
72 Accommodation & food services	0	97	923	1,020
81 Other services	0	139	808	946
92 Government & non-NAICS establish.	<u>0</u>	<u>37</u>	<u>68</u>	<u>105</u>
Total	25,200	3,498	8,249	36,947

Note: Employment positions include sole proprietors. Direct employment includes stadium and concession employees.

**Table A.39. Economic Impact of Pari-Mutuel Sports
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	368,701,632	5,961,456	2,103,511	376,766,592
21 Mining	0	604,703	316,516	921,219
22 Utilities	0	7,865,155	11,255,344	19,120,500
23 Construction	60,506,828	3,569,864	21,696,880	85,773,576
31-33 Manufacturing	43,007,448	16,064,242	14,405,551	73,477,240
42 Wholesale Trade	0	29,549,834	30,540,002	60,089,836
48-49 Transportation & Warehousing	19,629,860	18,731,780	11,449,901	49,811,540
44-45 Retail trade	0	12,778,597	70,471,656	83,250,256
51 Information	0	10,147,102	14,641,456	24,788,558
52 Finance & insurance	79,205,592	21,111,950	39,004,480	139,322,016
53 Real estate & rental	0	22,498,290	33,432,536	55,930,824
54 Professional, scientific & tech services	36,039,520	34,500,724	26,028,466	96,568,704
55 Management of companies	0	8,283,995	6,000,764	14,284,759
56 Administrative & waste services	0	12,670,973	11,544,687	24,215,660
61 Educational services	0	100,122	5,718,889	5,819,011
62 Health & social services	0	373,899	67,849,336	68,223,240
71 Arts, entertainment & recreation	169,336,608	3,799,669	7,315,003	180,451,280
72 Accommodation & food services	0	2,810,862	21,034,832	23,845,694
81 Other services	0	4,139,554	17,575,112	21,714,664
92 Government & non-NAICS establish.	<u>0</u>	<u>7,690,005</u>	<u>72,874,864</u>	<u>80,564,872</u>
Total	776,427,488	223,252,773	485,259,786	1,484,940,041

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

**Table A.40. Economic Impact of Pari-Mutuel Sports
Total Labor Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	316,174,304	3,092,293	1,011,097	320,277,728
21 Mining	0	308,585	144,597	453,182
22 Utilities	0	2,421,808	3,516,011	5,937,819
23 Construction	47,915,836	3,459,340	19,072,354	70,447,528
31-33 Manufacturing	24,365,054	10,948,801	9,191,533	44,505,388
42 Wholesale Trade	0	16,353,846	16,901,838	33,255,684
48-49 Transportation & Warehousing	15,135,759	14,974,522	9,251,328	39,361,608
44-45 Retail trade	0	7,785,103	42,523,396	50,308,500
51 Information	0	6,234,868	7,329,878	13,564,745
52 Finance & insurance	44,585,140	11,933,419	23,021,694	79,540,248
53 Real estate & rental	0	5,573,742	8,270,304	13,844,045
54 Professional, scientific & tech services	31,903,846	28,957,934	21,985,392	82,847,176
55 Management of companies	0	5,660,060	4,100,037	9,760,097
56 Administrative & waste services	0	10,638,598	9,610,445	20,249,042
61 Educational services	0	92,972	5,214,940	5,307,912
62 Health & social services	0	324,295	60,240,032	60,564,328
71 Arts, entertainment & recreation	100,063,520	3,059,582	5,205,671	108,328,776
72 Accommodation & food services	0	1,879,240	16,397,333	18,276,574
81 Other services	0	3,523,545	16,328,942	19,852,488
92 Government & non-NAICS establish.	0	1,800,329	3,285,253	5,085,582
Total	580,143,459	139,022,882	282,602,073	1,001,768,449

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

**Table A.41. Economic Impact of Pari-Mutuel Sports
Total Capital Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	48,392,348	2,624,446	1,009,322	52,026,116
21 Mining	0	249,023	134,387	383,410
22 Utilities	0	4,174,669	5,923,487	10,098,156
23 Construction	11,524,370	67,556	2,371,554	13,963,480
31-33 Manufacturing	17,631,602	4,756,148	4,860,151	27,247,900
42 Wholesale Trade	0	6,406,727	6,621,406	13,028,132
48-49 Transportation & Warehousing	4,022,353	2,863,863	1,643,010	8,529,225
44-45 Retail trade	0	2,545,547	14,274,154	16,819,700
51 Information	0	3,166,286	5,966,886	9,133,172
52 Finance & insurance	34,094,928	8,291,302	14,206,070	56,592,296
53 Real estate & rental	0	14,102,295	20,528,622	34,630,916
54 Professional, scientific & tech services	1,738,988	5,025,773	3,495,649	10,260,410
55 Management of companies	0	2,491,914	1,805,094	4,297,007
56 Administrative & waste services	0	1,716,478	1,607,572	3,324,050
61 Educational services	0	5,528	396,252	401,780
62 Health & social services	0	42,570	6,775,016	6,817,586
71 Arts, entertainment & recreation	47,853,660	422,105	1,304,875	49,580,640
72 Accommodation & food services	0	579,707	2,721,082	3,300,788
81 Other services	0	505,543	862,914	1,368,457
92 Government & non-NAICS establish.	0	5,882,711	59,482,924	65,365,632
Total	165,258,249	65,920,190	155,990,425	387,168,853

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.42 State and Local Government Revenue Impact of Pari-Mutuel Sports

Source	Amount \$
Sales Taxes	42,677,427
Property Taxes	33,133,237
Other Indirect Business Taxes	9,964,386
Payroll Taxes	1,666,243
Licenses, Fines and Fees	7,057,372
Corporate and Dividend Taxes	14,684,304
Total	109,182,969

**Table A.43. Economic Impact of Recreational Ownership of Horses
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	283,609,952	13,218,245	2,911,369	299,739,552
21 Mining	0	2,204,422	1,011,867	3,216,290
22 Utilities	6,736,174	6,834,446	12,522,698	26,093,318
23 Construction	337,916,704	3,193,480	42,573,824	383,684,000
31-33 Manufacturing	274,754,752	65,851,116	30,662,554	371,268,416
42 Wholesale Trade	0	52,431,112	32,060,536	84,491,648
48-49 Transportation & Warehousing	0	35,677,308	17,658,128	53,335,436
44-45 Retail trade	39,606,500	24,601,440	71,239,744	135,447,680
51 Information	0	11,565,076	20,823,634	32,388,710
52 Finance & insurance	167,244,368	32,779,290	56,362,872	256,386,544
53 Real estate & rental	91,870	22,786,964	37,996,788	60,875,624
54 Professional, scientific & tech services	48,151,004	40,048,568	26,791,356	114,990,936
55 Management of companies	0	11,193,945	6,580,029	17,773,974
56 Administrative & waste services	0	13,838,794	14,069,313	27,908,106
61 Educational services	0	140,237	7,339,887	7,480,123
62 Health & social services	0	529,174	84,528,568	85,057,744
71 Arts, entertainment & recreation	0	3,274,724	9,327,870	12,602,594
72 Accommodation & food services	0	4,234,895	31,644,860	35,879,756
81 Other services	0	7,229,551	28,156,766	35,386,320
92 Government & non-NAICS establish.	<u>1,885,087</u>	<u>8,308,917</u>	<u>71,154,768</u>	<u>81,348,768</u>
Total	1,159,996,411	359,941,704	605,417,431	2,125,355,539

*Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.
It does not include the impact from the care of racehorses.*

**Table A.44. Economic Impact of Recreational Ownership of Horses
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	8,937	211	37	9,185
21 Mining	0	11	5	16
22 Utilities	11	13	24	48
23 Construction	2,268	39	372	2,679
31-33 Manufacturing	1,404	346	145	1,895
42 Wholesale Trade	0	373	228	601
48-49 Transportation & Warehousing	0	330	171	501
44-45 Retail trade	709	419	1,213	2,341
51 Information	0	61	96	158
52 Finance & insurance	1,548	230	332	2,110
53 Real estate & rental	1	125	260	385
54 Professional, scientific & tech services	763	481	314	1,557
55 Management of companies	0	71	42	112
56 Administrative & waste services	0	270	270	539
61 Educational services	0	2	144	147
62 Health & social services	0	4	1,089	1,094
71 Arts, entertainment & recreation	0	63	155	218
72 Accommodation & food services	0	84	702	786
81 Other services	0	92	614	706
92 Government & non-NAICS establish.	<u>3</u>	<u>29</u>	<u>52</u>	<u>83</u>
Total	15,643	3,254	6,266	25,162

Note: Employment positions include sole proprietors. Direct employment includes stadium and concession employees.

**Table A.45. Economic Impact of Recreational Ownership of Horses
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	203,598,608	6,363,954	1,578,563	211,541,136
21 Mining	0	891,060	240,530	1,131,590
22 Utilities	4,741,883	4,682,469	8,554,991	17,979,342
23 Construction	109,478,472	1,585,891	16,355,341	127,419,704
31-33 Manufacturing	89,846,728	22,343,354	10,934,964	123,125,048
42 Wholesale Trade	0	37,959,924	23,211,704	61,171,632
48-49 Transportation & Warehousing	0	17,359,980	8,700,424	26,060,402
44-45 Retail trade	28,716,392	18,500,480	53,556,568	100,773,440
51 Information	0	6,242,703	11,128,961	17,371,662
52 Finance & insurance	132,196,440	20,630,264	29,656,928	182,483,632
53 Real estate & rental	64,820	13,787,185	25,404,426	39,256,432
54 Professional, scientific & tech services	21,961,764	29,631,448	19,744,864	71,338,072
55 Management of companies	0	7,757,411	4,559,964	12,317,375
56 Administrative & waste services	0	8,731,443	8,771,635	17,503,078
61 Educational services	0	76,326	4,349,135	4,425,462
62 Health & social services	0	217,725	51,596,104	51,813,832
71 Arts, entertainment & recreation	0	2,289,158	5,562,697	7,851,854
72 Accommodation & food services	0	2,559,649	15,996,016	18,555,666
81 Other services	0	2,759,518	13,363,778	16,123,296
92 Government & non-NAICS establish.	<u>1,472,850</u>	<u>5,738,164</u>	<u>55,417,652</u>	<u>62,628,668</u>
Total	592,077,957	210,108,104	368,685,245	1,170,871,322

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

**Table A.46. Economic Impact of Recreational Ownership of Horses
Total Labor Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	163,789,344	3,374,415	742,648	167,906,416
21 Mining	0	462,197	109,875	572,072
22 Utilities	1,409,189	1,447,293	2,672,500	5,528,982
23 Construction	86,696,864	1,522,828	14,377,819	102,597,512
31-33 Manufacturing	53,461,744	15,325,405	6,974,288	75,761,440
42 Wholesale Trade	0	21,008,264	12,846,118	33,854,384
48-49 Transportation & Warehousing	0	13,331,706	7,030,063	20,361,768
44-45 Retail trade	17,121,092	11,271,046	32,316,494	60,708,632
51 Information	0	3,715,078	5,571,144	9,286,222
52 Finance & insurance	74,818,704	11,761,362	17,504,706	104,084,768
53 Real estate & rental	14,003	3,553,795	6,284,740	9,852,538
54 Professional, scientific & tech services	19,441,348	24,993,448	16,673,735	61,108,532
55 Management of companies	0	5,300,270	3,115,606	8,415,877
56 Administrative & waste services	0	7,310,171	7,301,743	14,611,914
61 Educational services	0	71,650	3,965,854	4,037,505
62 Health & social services	0	188,844	45,809,432	45,998,276
71 Arts, entertainment & recreation	0	1,860,271	3,958,607	5,818,877
72 Accommodation & food services	0	1,668,586	12,469,636	14,138,222
81 Other services	0	2,426,438	12,416,310	14,842,748
92 Government & non-NAICS establish.	<u>181,004</u>	<u>1,384,365</u>	<u>2,497,566</u>	<u>4,062,935</u>
Total	416,933,292	131,977,433	214,638,883	763,549,620

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

**Table A.47. Economic Impact of Recreational Ownership of Horses
Total Capital Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	37,474,812	2,733,181	773,050	40,981,040
21 Mining	0	365,465	102,129	467,595
22 Utilities	2,556,064	2,475,053	4,502,306	9,533,422
23 Construction	20,851,704	44,700	1,786,813	22,683,218
31-33 Manufacturing	34,420,772	6,533,260	3,691,932	44,645,964
42 Wholesale Trade	0	8,230,126	5,032,551	13,262,676
48-49 Transportation & Warehousing	0	3,280,629	1,248,164	4,528,792
44-45 Retail trade	4,807,053	3,685,368	10,848,059	19,340,480
51 Information	0	2,012,969	4,535,711	6,548,680
52 Finance & insurance	56,428,424	8,180,987	10,801,314	75,410,720
53 Real estate & rental	40,544	8,622,020	15,598,793	24,261,356
54 Professional, scientific & tech services	1,059,971	4,198,878	2,655,324	7,914,174
55 Management of companies	0	2,333,512	1,371,686	3,705,197
56 Administrative & waste services	0	1,200,038	1,221,642	2,421,680
61 Educational services	0	3,562	301,373	304,935
62 Health & social services	0	24,785	5,152,242	5,177,028
71 Arts, entertainment & recreation	0	183,779	992,331	1,176,109
72 Accommodation & food services	0	557,652	2,069,100	2,626,752
81 Other services	0	265,852	656,054	921,906
92 Government & non-NAICS establish.	<u>1,288,108</u>	<u>4,349,477</u>	<u>45,233,944</u>	<u>50,871,528</u>
Total	158,927,451	59,281,292	118,574,516	336,783,251

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.48. State and Local Government Revenue Impact of Recreational Ownership of Horses

Source	Amount \$
Sales Taxes	31,216,397
Property Taxes	24,253,193
Other Indirect Business Taxes	7,288,450
Payroll Taxes	1,271,527
Licenses, Fines and Fees	5,348,836
Corporate and Dividend Taxes	<u>12,730,870</u>
Total	82,109,273

**Table A.49. Economic Impact of Florida's Sports Commissions-Sponsored Events
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	851,187	960,161	1,811,348
21 Mining	0	338,809	336,498	675,307
22 Utilities	0	4,769,925	4,147,555	8,917,480
23 Construction	0	2,273,491	17,076,718	19,350,210
31-33 Manufacturing	0	9,527,154	10,550,148	20,077,302
42 Wholesale Trade	0	8,296,660	10,707,284	19,003,944
48-49 Transportation & Warehousing	33,764,136	7,232,685	5,911,302	46,908,124
44-45 Retail trade	28,505,342	2,340,458	23,797,196	54,642,996
51 Information	0	8,100,361	6,924,048	15,024,407
52 Finance & insurance	0	7,052,474	18,601,834	25,654,308
53 Real estate & rental	339,788	16,533,807	12,735,776	29,609,370
54 Professional, scientific & tech services	570	9,623,673	9,220,405	18,844,648
55 Management of companies	0	3,458,089	2,203,794	5,661,883
56 Administrative & waste services	0	9,953,430	4,718,893	14,672,323
61 Educational services	0	56,154	2,412,082	2,468,236
62 Health & social services	0	129,386	27,817,226	27,946,612
71 Arts, entertainment & recreation	74,249,248	9,900,076	3,069,853	87,219,184
72 Accommodation & food services	215,801,984	3,188,099	10,404,374	229,394,464
81 Other services	0	2,257,426	9,292,948	11,550,374
92 Government & non-NAICS establish.	<u>643,082</u>	<u>4,344,114</u>	<u>23,408,960</u>	<u>28,396,156</u>
Total	353,304,149	110,227,455	204,297,054	667,828,674

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

**Table A.50. Economic Impact of Florida's Sports Commissions-Sponsored Events
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	11	13	25
21 Mining	0	2	2	3
22 Utilities	0	9	8	17
23 Construction	0	28	149	177
31-33 Manufacturing	0	47	50	97
42 Wholesale Trade	0	59	76	135
48-49 Transportation & Warehousing	170	76	57	303
44-45 Retail trade	563	40	405	1,008
51 Information	0	44	32	76
52 Finance & insurance	0	43	110	153
53 Real estate & rental	2	81	87	170
54 Professional, scientific & tech services	0	116	109	224
55 Management of companies	0	22	14	36
56 Administrative & waste services	0	165	91	256
61 Educational services	0	1	47	48
62 Health & social services	0	1	359	360
71 Arts, entertainment & recreation	1,680	189	51	1,919
72 Accommodation & food services	4,087	70	231	4,389
81 Other services	0	33	202	235
92 Government & non-NAICS establish.	4	15	17	36
Total	6,506	1,052	2,109	9,667

Note: Employment positions include sole proprietors. Direct employment includes stadium and concession employees.

**Table A.51. Economic Impact of Florida's Sports Commissions-Sponsored Events
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	330,152	511,774	841,926
21 Mining	0	71,741	80,405	152,146
22 Utilities	0	3,290,060	2,833,613	6,123,672
23 Construction	0	1,120,793	6,539,753	7,660,545
31-33 Manufacturing	0	3,215,527	3,759,777	6,975,304
42 Wholesale Trade	0	6,006,750	7,752,033	13,758,783
48-49 Transportation & Warehousing	12,770,741	3,927,291	2,912,060	19,610,092
44-45 Retail trade	21,737,438	1,760,043	17,890,338	41,387,820
51 Information	0	4,000,997	3,702,556	7,703,552
52 Finance & insurance	0	4,331,296	9,793,250	14,124,546
53 Real estate & rental	239,741	12,445,800	8,514,022	21,199,562
54 Professional, scientific & tech services	441	7,054,451	6,795,649	13,850,540
55 Management of companies	0	2,396,458	1,527,231	3,923,688
56 Administrative & waste services	0	5,616,032	2,943,828	8,559,860
61 Educational services	0	30,559	1,429,132	1,459,691
62 Health & social services	0	53,290	16,974,542	17,027,832
71 Arts, entertainment & recreation	44,784,912	5,098,338	1,830,946	51,714,192
72 Accommodation & food services	139,116,800	1,632,907	5,261,542	146,011,248
81 Other services	0	910,598	4,406,814	5,317,412
92 Government & non-NAICS establish.	<u>477,274</u>	<u>2,999,246</u>	<u>18,228,210</u>	<u>21,704,728</u>
Total	219,127,346	66,292,325	123,687,471	409,107,139

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

**Table A.52. Economic Impact of Florida's Sports Commissions-Sponsored Events
Total Labor Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	155,305	259,740	415,045
21 Mining	0	31,206	36,814	68,020
22 Utilities	0	1,009,573	885,080	1,894,653
23 Construction	0	1,086,069	5,741,562	6,827,631
31-33 Manufacturing	0	2,044,306	2,420,907	4,465,213
42 Wholesale Trade	0	3,324,332	4,290,229	7,614,561
48-49 Transportation & Warehousing	10,419,715	3,324,355	2,351,904	16,095,975
44-45 Retail trade	13,032,712	1,072,271	10,796,408	24,901,390
51 Information	0	2,506,761	1,855,845	4,362,606
52 Finance & insurance	0	2,350,901	5,778,342	8,129,243
53 Real estate & rental	51,792	2,110,189	2,103,386	4,265,367
54 Professional, scientific & tech services	267	5,802,999	5,783,862	11,587,127
55 Management of companies	0	1,637,386	1,043,484	2,680,870
56 Administrative & waste services	0	4,740,140	2,452,585	7,192,724
61 Educational services	0	28,698	1,303,465	1,332,163
62 Health & social services	0	46,252	15,072,169	15,118,421
71 Arts, entertainment & recreation	26,642,098	3,480,449	1,303,222	31,425,772
72 Accommodation & food services	84,983,496	1,258,200	4,099,823	90,341,520
81 Other services	0	807,863	4,093,617	4,901,479
92 Government & non-NAICS establish.	<u>144,332</u>	<u>756,471</u>	<u>827,001</u>	<u>1,727,805</u>
Total	135,274,412	37,573,724	72,499,441	245,347,583

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

**Table A.53. Economic Impact of Florida's Sports Commissions-Sponsored Events
Total Capital Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	157,476	231,140	388,617
21 Mining	0	31,054	34,100	65,155
22 Utilities	0	1,746,246	1,491,358	3,237,603
23 Construction	0	21,171	722,067	743,239
31-33 Manufacturing	0	1,067,013	1,247,495	2,314,509
42 Wholesale Trade	0	1,302,329	1,680,725	2,983,054
48-49 Transportation & Warehousing	836,127	278,558	419,147	1,533,831
44-45 Retail trade	4,462,690	350,607	3,623,058	8,436,354
51 Information	0	1,233,632	1,506,713	2,740,345
52 Finance & insurance	0	1,766,376	3,568,679	5,335,055
53 Real estate & rental	149,954	8,967,994	5,230,261	14,348,208
54 Professional, scientific & tech services	171	1,128,283	871,222	1,999,676
55 Management of companies	0	720,880	459,407	1,180,287
56 Administrative & waste services	0	710,542	408,267	1,118,808
61 Educational services	0	1,417	98,796	100,213
62 Health & social services	0	6,038	1,693,598	1,699,636
71 Arts, entertainment & recreation	14,643,801	1,273,598	326,416	16,243,815
72 Accommodation & food services	34,315,880	218,918	681,846	35,216,648
81 Other services	0	79,979	217,056	297,035
92 Government & non-NAICS establish.	<u>332,915</u>	<u>2,239,926</u>	<u>14,876,706</u>	<u>17,449,546</u>
Total	54,741,537	23,302,036	39,388,057	117,431,632

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.54. State and Local Government Revenue Impact of Sports Commissions Events

Source	Amount \$
Sales Taxes	20,354,885
Property Taxes	15,662,887
Other Indirect Business Taxes	4,752,487
Payroll Taxes	414,496
Licenses, Fines and Fees	1,905,788
Corporate and Dividend Taxes	<u>4,441,433</u>
Total	47,531,976

**Table A.55. Economic Impact of Florida's Professional Golf and Tennis Tournaments
Total Economic Output (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	165,443	305,009	470,451
21 Mining	0	94,224	106,853	201,077
22 Utilities	0	1,358,503	1,317,922	2,676,425
23 Construction	0	771,660	5,284,345	6,056,005
31-33 Manufacturing	0	1,983,865	3,332,882	5,316,747
42 Wholesale Trade	0	1,671,514	3,398,113	5,069,627
48-49 Transportation & Warehousing	8,955,838	2,071,074	1,874,847	12,901,759
44-45 Retail trade	3,947,564	679,603	7,552,156	12,179,322
51 Information	0	2,577,083	2,198,798	4,775,881
52 Finance & insurance	0	2,425,664	5,914,077	8,339,741
53 Real estate & rental	0	6,023,641	4,039,696	10,063,338
54 Professional, scientific & tech services	76	3,361,431	2,913,341	6,274,848
55 Management of companies	0	1,030,406	699,077	1,729,482
56 Administrative & waste services	0	4,283,525	1,496,657	5,780,182
61 Educational services	0	584,322	767,337	1,351,659
62 Health & social services	0	66,932	8,847,603	8,914,534
71 Arts, entertainment & recreation	49,287,960	4,854,259	976,368	55,118,588
72 Accommodation & food services	47,569,232	901,835	3,309,749	51,780,816
81 Other services	0	653,701	2,954,406	3,608,107
92 Government & non-NAICS establish.	<u>26,837</u>	<u>1,326,969</u>	<u>7,445,860</u>	<u>8,799,666</u>
Total	109,787,507	36,885,652	64,735,092	211,408,253

Note: "Output" refers to gross operating revenues of private-sector firms and operating costs of government.

**Table A.56. Economic Impact of Florida's Professional Golf and Tennis Tournaments
Total Employment (2004, Full and Part-time Employment Positions)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	3	4	7
21 Mining	0	1	1	1
22 Utilities	0	3	3	5
23 Construction	0	10	46	56
31-33 Manufacturing	0	10	16	26
42 Wholesale Trade	0	12	24	36
48-49 Transportation & Warehousing	45	23	18	86
44-45 Retail trade	79	12	129	219
51 Information	0	14	10	24
52 Finance & insurance	0	15	35	50
53 Real estate & rental	0	30	28	57
54 Professional, scientific & tech services	0	41	34	75
55 Management of companies	0	7	4	11
56 Administrative & waste services	0	75	29	104
61 Educational services	0	9	15	24
62 Health & social services	0	1	114	115
71 Arts, entertainment & recreation	1,024	89	16	1,129
72 Accommodation & food services	830	20	73	923
81 Other services	0	9	64	74
92 Government & non-NAICS establish.	<u>0</u>	<u>5</u>	<u>5</u>	<u>11</u>
Total	1,978	384	669	3,031

Note: Employment positions include sole proprietors. Direct employment includes stadium and concession employees.

**Table A.57. Economic Impact of Florida's Professional Golf and Tennis Tournaments
Total Gross State Product (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	62,869	162,611	225,480
21 Mining	0	19,992	25,510	45,502
22 Utilities	0	940,016	900,397	1,840,413
23 Construction	0	380,405	2,024,517	2,404,922
31-33 Manufacturing	0	697,258	1,187,876	1,885,134
42 Wholesale Trade	0	1,210,170	2,460,220	3,670,390
48-49 Transportation & Warehousing	3,387,402	1,169,831	923,660	5,480,893
44-45 Retail trade	3,031,251	511,066	5,677,581	9,219,897
51 Information	0	1,290,322	1,175,696	2,466,018
52 Finance & insurance	0	1,454,716	3,113,312	4,568,028
53 Real estate & rental	0	4,530,925	2,700,633	7,231,558
54 Professional, scientific & tech services	59	2,475,503	2,146,733	4,622,294
55 Management of companies	0	714,072	484,461	1,198,532
56 Administrative & waste services	0	2,548,542	933,590	3,482,131
61 Educational services	0	345,024	454,644	799,667
62 Health & social services	0	27,553	5,399,208	5,426,761
71 Arts, entertainment & recreation	26,525,450	2,431,251	582,323	29,539,024
72 Accommodation & food services	33,657,068	469,214	1,673,642	35,799,924
81 Other services	0	261,119	1,401,193	1,662,312
92 Government & non-NAICS establish.	<u>18,642</u>	<u>907,792</u>	<u>5,798,147</u>	<u>6,724,581</u>
Total	66,619,871	22,447,638	39,225,952	128,293,460

Note: "Gross state product" represents the value added created by Florida private and public enterprises.

**Table A.58. Economic Impact of Florida's Professional Golf and Tennis Tournaments
Total Labor Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	31,563	82,516	114,079
21 Mining	0	8,704	11,675	20,379
22 Utilities	0	289,261	281,245	570,506
23 Construction	0	368,712	1,777,715	2,146,427
31-33 Manufacturing	0	460,951	763,786	1,224,737
42 Wholesale Trade	0	669,748	1,361,567	2,031,314
48-49 Transportation & Warehousing	2,763,799	1,009,016	746,052	4,518,867
44-45 Retail trade	1,818,741	311,357	3,426,232	5,556,330
51 Information	0	799,977	589,180	1,389,157
52 Finance & insurance	0	815,854	1,837,052	2,652,907
53 Real estate & rental	0	771,333	667,326	1,438,659
54 Professional, scientific & tech services	35	2,039,625	1,825,756	3,865,416
55 Management of companies	0	487,891	331,009	818,900
56 Administrative & waste services	0	2,126,329	777,704	2,904,033
61 Educational services	0	239,108	414,652	653,760
62 Health & social services	0	23,907	4,794,039	4,817,946
71 Arts, entertainment & recreation	18,824,598	1,601,371	414,472	20,840,442
72 Accommodation & food services	18,712,578	355,850	1,304,201	20,372,628
81 Other services	0	231,304	1,301,646	1,532,951
92 Government & non-NAICS establish.	<u>4,963</u>	<u>244,064</u>	<u>262,793</u>	<u>511,821</u>
Total	42,124,714	12,885,925	22,970,616	77,981,257

Note: "Labor income" refers to compensation to wage and salary workers and earnings of sole proprietors. Compensation includes fringe benefits.

**Table A.59. Economic Impact of Florida's Professional Golf and Tennis Tournaments
Total Capital Income (2004 \$)**

NAICS Code/Industry Description	Direct Effect	Indirect Effect	Induced Effect	Total Effect
11 Ag, Forestry, Fish & Hunting	0	27,965	73,454	101,419
21 Mining	0	8,651	10,821	19,472
22 Utilities	0	498,849	473,884	972,732
23 Construction	0	7,089	223,231	230,320
31-33 Manufacturing	0	216,727	395,173	611,901
42 Wholesale Trade	0	262,378	533,403	795,781
48-49 Transportation & Warehousing	221,780	74,666	132,869	429,315
44-45 Retail trade	637,647	101,806	1,149,827	1,889,280
51 Information	0	405,237	478,549	883,786
52 Finance & insurance	0	565,514	1,134,409	1,699,922
53 Real estate & rental	0	3,259,097	1,658,911	4,918,008
54 Professional, scientific & tech services	23	392,919	276,422	669,364
55 Management of companies	0	214,800	145,731	360,531
56 Administrative & waste services	0	350,473	129,556	480,028
61 Educational services	0	87,512	31,441	118,953
62 Health & social services	0	3,129	538,766	541,895
71 Arts, entertainment & recreation	5,815,391	673,245	103,824	6,592,460
72 Accommodation & food services	9,606,864	66,943	216,825	9,890,633
81 Other services	0	23,431	68,980	92,410
92 Government & non-NAICS establish.	13,675	662,901	4,732,168	5,408,745
Total	16,295,380	7,903,333	12,508,242	36,706,955

Note: "Capital income" represents corporate profits, interest and dividends.

Table A.60. State and Local Government Revenue Impact of Florida's Professional Golf and Tennis Tournaments

Source	Amount \$
Sales Taxes	5,988,632
Property Taxes	4,611,881
Other Indirect Business Taxes	1,398,234
Payroll Taxes	126,972
Licenses, Fines and Fees	599,135
Corporate and Dividend Taxes	1,390,414
Total	14,115,268

APPENDIX II
THE WASHINGTON ECONOMICS GROUP'S TEAM & QUALIFICATIONS

J. Antonio “Tony” Villamil
Principal Advisor

- Tony Villamil served as U.S. Undersecretary of Commerce for Economic Affairs in the George H. Bush Administration, and is currently Chief Executive Officer of The Washington Economics Group. Mr. Villamil has significant experience as a senior economist of top U.S. financial institutions and as an economic policymaker in the public sector. Tony’s areas of specialization are in U.S. trade policy, international economics, economic development and forecasting for business decisions.
- Mr. Villamil serves on President George W. Bush Advisory Committee on Trade Policy and Negotiations, and is Chairman of the Governor’s Council of Economic Advisors of Florida. He is a member of the Board of Directors of CommerceBank, N.A., the Spanish Broadcasting System (SBS) and Enterprise Florida – the State’s principal economic development organization. Tony is also Vice Chair of Florida FTAA, and is an active member of the National Association for Business Economics (NABE).
- Mr. Villamil received B.S. and M.A. degrees in Economics from Louisiana State University (LSU), where he completed coursework for the Ph.D degree. In 1991, Florida International University (FIU) awarded him a Doctor of Science degree in Economics (Hon.) upon recommendation of the Graduate Faculty for “distinguished service to the Nation in the field of economics.” Mr. Villamil publishes widely on economics and trade policy topics, and is an adjunct professor of Competitive Strategy in the Executive MBA program of Florida International University.
- *The Washington Economics Group*, headquartered in Coral Gables, Florida, has been successfully meeting client objectives since 1993 through strategic consulting services for corporations and institutions based in the Americas.

Robert David Cruz, Ph.D.
Chief Economist

- Dr. Cruz serves as Chief Economist of *The Washington Economics Group, Inc.*, a Florida-based economics-consulting firm founded in 1993. He also holds the position of Associate Professor of Economics and Business Program Director in the Andreas School of Business of Barry University.
- Dr. Cruz has extensive business consulting experience, having advised local Florida governments, numerous domestic and transnational corporations over the past 10 years, as well as having served as a consultant to The World Bank. He is a regular advisor to chambers of commerce and economic development organizations. His areas of specialization include macroeconomics, international economics and finance, corporate finance and econometrics. A specialist in quantitative analyses and economic and financial modeling, Robert Cruz has published numerous articles in professional journals and co-authored a book on the *Enterprise for the Americas Initiative* and its impact on South Florida.
- At *The Washington Economics Group, Inc.*, Dr. Cruz collaborates closely with CEO Tony Villamil and directs the Economic Impact Studies practice of the firm, economic forecasting and business research.
- Bob received his Ph.D. in Economics from the University of Pennsylvania (Philadelphia) in 1985. His Bachelor of Arts degree, awarded in 1978, is from Georgetown University (Washington, D.C.).



The Washington Economics Group, Inc. has been successfully meeting client objectives since 1993 through economic consulting services for corporations, institutions and governments of the Americas. We have the expertise, high-level contacts, and business alliances to strengthen your competitive positioning in the growing marketplaces of Florida and Latin America.

Our roster of clients, over the past twelve years, includes multinational corporations, financial institutions, public entities, and non-profit associations expanding their operations in the Americas.

EXCLUSIVE CONSULTING APPROACH:

Each client is unique to us. We spend considerable time and effort in understanding the operations, goals, and objectives of clients as they seek our consulting and strategic advice. We are not a mass-production consulting entity nor do we accept every project that comes to us. We engage a limited number of clients each year that require customized consulting services in our premier areas of specialization. These premier and exclusive services are headed by former U.S. Undersecretary of Commerce, Dr. J. Antonio Villamil, with over thirty years of experience as a business executive and as a senior public official of the U.S. and most recently of Florida.

PREMIER CONSULTING SERVICES:

Comprehensive Corporate Expansion Services for Florida. Our seamless and customized service includes site selection analysis, development of incentive strategies and community and governmental relations.

Economic Impact Studies highlight the importance of a client's activities in the generation of income, output and employment in the market area serviced by the entity. These studies are also utilized to analyze the impact of public policies on key factors that may affect a client's activities such as tax changes, zoning, environmental permits and others.

Strategic Business Development Services. These services are customized to meet client objectives, with particular emphasis in the growing marketplaces of Florida, Mexico, Central and South America. Recent consulting assignments include customized marketing strategies, country risk assessments for investment decisions and corporate spokesperson activities and speeches on behalf of the client at public or private meetings.