

Duval County  
St. Johns County



## Impacts of Visitor Spending on the Local Economy

*10th Anniversary DONNA Marathon Weekend, February 10 – 12, 2017*

Economic Impact Report – 2017



**ON THE COVER**

*View of the 26.2 Donna Marathon Race*

Photograph courtesy of [breastcancermarathon.com](http://breastcancermarathon.com)

## **Impacts of Visitor Spending on the Local Economy**

*10th Anniversary DONNA Marathon Weekend, February 10 – 12, 2017*

Economic Impact Report – 2017

Prepared on March 28, 2017:

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## **PROJECT PROFILE**

**Title:** Impact of Visitor Spending on the Local Economy: 10<sup>th</sup> Anniversary DONNA Marathon Weekend

**Objectives:** Produce report on visitor spending in Duval and St. Johns Counties which is attributable to the DONNA Marathon Weekend

**Principal Investigator:** Michael Binder, Ph.D.

**Report Preparer:** Michael Binder and Andrew Hopkins

**Methods:** On-site in-person intercept survey, emailed web survey and event registration statistics

**Timeframe:** February 2017 – March 2017

## **TABLE OF CONTENTS**

Executive summary	5
Methodology	6
Sample to Population Comparison	8
Economic Impact	12
Survey Results	13
Study Limitations	17
Survey Instrument	18

## EXECUTIVE SUMMARY

The DONNA foundation was designed to fund ground breaking breast cancer research and to provide financial support for individuals living with breast cancer. Since its creation, the DONNA Foundation has served more than 10,000 families raised more than \$4 million towards its vision to end breast cancer. The founder, Donna Deegan, started the DONNA Marathon Weekend in 2007.

The 10<sup>th</sup> Annual DONNA Marathon weekend hosted 8,800 runners in 2017. Based on a 2017 in-person survey conducted Friday, February 10 and Saturday February 11, at the DONNA Expo located at the Prime F. Osborn III Convention Center in Downtown Jacksonville. Forty-six percent of event goers who registered in an event were from Duval County, 16 percent were from St. Johns and 41 percent traveled from outside of these two counties.

Ninety-one percent of visitors (participants and non-participants) said that the DONNA Marathon was the main reason for their visit to Jacksonville and the St. Johns area.<sup>1</sup> It is estimated that 5,818 of these visitors were event influenced visitors (EIV). These EIV, who stayed overnight or just for the day contributed to the overall direct expenditures.

Sixty-eight percent of EIV overnight accommodations were at a hotel or motel, 77 percent spent at least one night in Duval or St Johns County, resulting in 3,083 commercial room nights and averaging 2.35 people per room. Twenty-five percent of overnight accommodations were in non-paid lodging, such as private housing.

Total EIV spending was reported within Jacksonville and St Johns County area as \$1,318,878.<sup>2</sup> EIV averaged spending was \$48 at the Donna Expo, \$52 on bars and restaurants, \$23 on shopping, \$8 on groceries and \$3 on amusements and attractions per day.

The economic impact of the DONNA Marathon was estimated by not counting local residents and counting only event influenced visors paid overnight accommodations, total spending, and travel in Duval and St. Johns County. Direct expenditures of these out-of-town visitors were estimated to be \$1,219,595 for Duval and \$403,863 for St. Johns County. To estimate the additional economic benefits injected in the region a sporting event multiplier was used to provide a total economic impact of \$3,284,975.<sup>3</sup>

### Local Economic Impact of The DONNA Marathon Weekend, 2017

Estimated Total Economic Impact in Duval County	\$2,594,987
Estimated Total Economic Impact in St. Johns County	\$689,806
Estimated Total Economic Impact combined for Duval and St. Johns Counties	\$3,284,975

<sup>1</sup> In this report, if visitor's main reason for visiting Jacksonville/St. Johns area was for the DONNA Marathon they are referred to as event influenced visitors (EIV).

<sup>2</sup> Total spending is based on questions 9a-9e in the survey instrument, i.e., event spending (not including participation and registration fees), bars, restaurants, amusement and attractions).

<sup>3</sup> Economic multiplier captures the size of secondary effects, which come from economic activity in a region that result from the re-circulation of money spent by event influenced visitors.

## **METHODOLOGY**

The economic impact survey was conducted during and after the DONNA Marathon Weekend, February 10 – 12, 2017 in the Florida counties of Jacksonville and St. Johns. Three primary sources of data were collected to complete this analysis.

First, an on-site, in-person, intercept survey was conducted at the DONNA Expo which was located at the Prime F. Osborn III Convention Center in Jacksonville, Fla. The Expo was open to race registrants and public visitors from 12:00 p.m. to 7:00 p.m. on Friday, February 10, 2017 and from 7:00 a.m. to 5:00 p.m. Saturday, February 11, 2017. A total of 12 interviewers and 2 supervisors were used to conduct the intercept surveys.

Each surveyor approached every other attendee; refusals were also tallied and factored to calculate the completion percentage of 75.5 percent. To ensure a representative sample, the surveying was conducted from 12:00 p.m. – 7:00 p.m., Friday, February 10, 2017 and from 7:00 a.m. – 5:00 p.m. Saturday, February 11, 2017.

A second source of data was collected from an online survey that was sent to race participants after the race weekend concluded. The DONNA Foundation collected email addresses from all of the runners, and then sent an email invitation to participate in a post-race evaluation of the event. That survey was available from February 26 to March 16, 2017. As a note, when data was available from both the in-person survey and the online survey, the results of both methods are combined and the mean is used to calculate the economic impact. No one measure is ever perfect, and diversifying the method of contact and response gives broader access to the population and can improve estimations.

Finally, the official event registration statistics provided by The DONNA Foundation are used as a basis for population estimations.

The economic impact from festivals and events only relates to new money introduced into the local economy by visitors from outside the community. Additionally, only visitors that are motivated to come to the community because of the event can have their economic contributions credited toward the event. In contrast, residents who spend money at local events may produce a short-term surge in the economy, but in actuality, this circulation of revenue is internal and would likely have been spent in the community eventually – even if it were spent in a different manner. These estimates do not include event related expenditures by the DONNA Foundation, corporate sponsors or local governments. Nor do these estimates consider any direct charitable contributions by the community or benefit derived from the free media attention as a result of the event. Provided below are estimations for direct expenditures from visitors and the overall impact that was based on a sporting event economic impact multiplier. Money flows into a local economy like ripples in a pond; the initial splash spreads out across the county and provides benefit even to those who are not explicitly involved in the event.

The economic impact data is based upon estimates from the percentage of adult visitors, from outside Duval County and St. Johns County, who were at least somewhat influenced to come to Jacksonville or St. Johns County because of The DONNA Marathon Weekend. The University of North Florida Public Opinion Research Lab (PORN) estimated the number of unique individual adult attendees to the event by multiplying the total number of unique registrations for



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all of the events during the DONNA Marathon Weekend. In addition to runners, there were a number of visitors who did not run in any events, but came to the Jacksonville/St. Johns area with event participants. Of the 8,800 unique individual registrants, it is estimated that approximately 3,442 runners, and 5,818 visitors in total, were at least somewhat influenced to visit Jacksonville/St. Johns area as a result of the DONNA Marathon Weekend. These unique attendee visitors from outside of Duval and St. Johns County contributed to an economic impact of approximately \$3.3 million. Duval County is estimated to have received a \$2.6 million economic impact, while St. Johns benefitted from an economic impact of \$690 thousand. The economic impact estimates were calculated by capturing the spending habits of both the runner and non-runner influenced visitors.

To further put this economic impact estimation into perspective, these event goers stayed an average of 2.27 nights in Duval and St. Johns County. Additionally, 71 percent of all event influenced visitors that spent at least one night in the Jacksonville/St. Johns area stayed in a hotel/motel for a total of approximately 2436 commercial room nights in Duval County and 648 commercial room nights in St. Johns County.

Due to rounding, some percentages in the tables below may not equal 100 percent. For information on methodology, you may reach Dr. Michael Binder at (904) 620-1205.

## SAMPLE TO POPULATION COMPARISON

When sampling a population there is always the possibility that a random sample will not reflect the greater population. As a check on that possibility demographics are presented of the in-person intercept survey, online post-race sample and the total registration information (when available) for purposes of comparison.

### Sex of the respondent

	<b>In-person Survey Event Influenced Visitors n=401</b>	<b>In-person Survey Total Sample n=1025</b>	<b>Online Post-Race Survey n=929</b>	<b>Total Registration N=8800*</b>
Male	30%	30%	23%	30%
Female	70%	70%	77%	70%

\*Total Registration data provided by The DONNA Foundation.

The in-person survey identically matched the sex breakdown of the registered runners, while the online survey was slightly overrepresented with females. The similarity of the in-person survey and the total registration statistics add confidence to the estimates.

### Are you a resident of Duval County or St. Johns County?\*

	<b>In-person Survey Total Sample n=1025*</b>	<b>Total Registration N=8800**</b>
Duval County Resident	47%	46%
St. Johns County Resident	12%	14%
Visitor	41%	41%

\*Percentages may sum to greater than 100% due to rounding.

\*\*Total Registration data provided by The DONNA Foundation.

The responses from the in-person sample are nearly identical to the zip code data of event registrants provided by The DONNA Foundation. This provides substantial confirmation that the sample is representative of the population of runners.

Which category best describes the highest level of education that you completed?\*

	<b>In-person Survey Event Influenced Visitors n=394</b>	<b>In-person Survey Total Sample n=1005</b>	<b>Total Registration N=8800</b>
Less than High School	<1%	1%	-
High School Graduate	6%	6%	-
Some College	14%	16%	-
College Graduate	38%	42%	-
Graduate Degree	41%	35%	-

\*Percentages may sum to greater than 100% due to rounding.

Which category best describes your household's yearly income?\*

	<b>In-person Survey Event Influenced Visitors n=344</b>	<b>In-person Survey Total Sample n=848</b>	<b>Total Registration N=8800</b>
Less than \$25,000	2%	3%	-
\$25,000 - \$50,000	12%	15%	-
\$50,000 - \$75,000	23%	20%	-
\$75,000 - \$100,000	20%	22%	-
Above \$100,000	42%	39%	-

\*Percentages may sum to greater than 100% due to rounding.

Neither education nor income is available in the registration statistics; however, it is plain to see that both the total sample and visitors (even more so) are highly educated and have relatively high incomes.



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What is your age?\*

	<b>In-person Survey Event Influenced Visitors n=398</b>	<b>In-person Survey Total Sample n=1016</b>	<b>Total Registration N=8800**</b>
Under 18	-	-	9%
18 – 24	5%	6%	5%
25 – 44	32%	39%	43%
45 – 64	53%	46%	39%
65 and over	10%	8%	4%

\*Percentages may sum to greater than 100% due to rounding.

\*\*Total Registration data provided by The DONNA Foundation.

The in-person survey only reached out to adults, therefore there is no one under the age of 18 in either the visitor or total sample. The total sample is close to the distribution of the registration data, but slightly undersamples 25 – 44 year olds and slightly oversamples those 45 years and older. However, the differences are not striking and within reasonable margins.

Which events are you running in this weekend?\*

	<b>In-person Survey Event Influenced Visitors n=356**</b>	<b>In-person Survey Total Sample n=856**</b>	<b>Online Post-Race Survey n=846</b>	<b>Total Registration N=8800***</b>
Full Marathon	16%	13%	22%	19%
Half Marathon	51%	46%	56%	45%
10k	27%	28%	19%	14%
5k	29%	29%	18%	16%
Family Fun Run	3%	4%	2%	5%
Ultra-Marathon	<1%	<1%	<1%	<1%
Team Relay	4%	5%	6%	10%
Not Running	14%	16%		-

\*Percentages sum to greater than 100% since individuals can run in multiple events.

\*\*Event percentages based on the number of event runners (n=356 Event Influenced Visitors and n=856 for Total Sample), percentage of runners and non-runners based on total sample (n=401 Event Influenced Visitors and n=1025 for Total Sample).

\*\*\*Total Registration data provided by The DONNA Foundation.

The total event participation data provided by The DONNA Foundation diverges slightly from the in-person sample obtained at the Expo and also from the online post-race survey. The in-person sample is heavier on 5k and 10k participants, while it is light on relay participants. There are two possible explanations for the increased number of 5k and 10k runners. First, both events began and ended at the Prime F. Osborn III Center, the location of the Expo where the survey was conducted. These runners could have been more likely to spend excess time at the Expo, making them more likely to get approached to take a survey and also more likely to have the time to take the survey. Additionally, during the packet pickup process there were extensive lines for both the 5k and 10k during the opening two hours of the Expo on Friday. The long lines allowed registrants to respond to the survey in an essentially costless manner. Interviewers were able to interview them while the lines inched along.

The online survey has slightly more half and full marathon runners. One potential explanation for this is that those who ran longer events are more invested in the event and are therefore more likely to respond to an email survey after the event.

Both the in-person and online surveys also have fewer team relay registrants. For the in-person survey that is likely due to the fact that individual team members did not have to personally show up at the Expo to obtain their race gear, only the team captain was required to check in. For the online survey, many of the relay team participants did not have to individually register; therefore many fewer relay participants were contacted.

## Economic Impact

Estimated Event Influenced Visitors in Duval County	4,596
Estimated Event Influenced Visitors in St. Johns County	1,222
Estimated Event Influenced Commercial Room Nights in Duval County	2,435
Estimated Event Influenced Commercial Room Nights in St. Johns County	648
Average Length of Stay for all Event Influenced Visitors	2.08 Days
Average Length of Stay in Commercial Room	2.27 Nights
Average Visitor Party Size per Hotel Room	2.35 People
Estimated Number of Event Influenced Visitors Staying in Commercial Lodgings in Duval County	2,522
Estimated Number of Event Influenced Visitors Staying in Commercial Lodgings in St. Johns	670
Event Related Average Daily Rate (ADR) per Commercial Room	\$167
Estimated Direct Expenditure <sup>1</sup> in Duval County	\$1,219,595
Estimated Direct Expenditure <sup>1</sup> in St. Johns County	\$403,863
Sporting Event Multiplier	1.7
Estimated Total Economic Impact <sup>2</sup> in Duval County	\$2,594,987
Estimated Total Economic Impact <sup>2</sup> in St. Johns County	\$689,806
Estimated Total Economic Impact <sup>2</sup> combined for Duval and St. Johns Counties	\$3,284,975

<sup>1</sup> The direct expenditure was estimated by calculating the total amount of out-of-town visitors multiplied by the number of days spent in Jacksonville times the average spending per day per visitor.

<sup>2</sup> The total economic impact was calculated using a regional sporting event multiplier.

## SURVEY RESULTS

Would you say that the 26.2 with Donna:

	<b>In-person Survey Visitors n=413</b>
Was the main reason for your visit to Jacksonville/St. Johns area	91%
Influenced your visit, but was not the main reason for your visit to Jacksonville/St. Johns area	7%
Did not influence your decision to visit Jacksonville/St. Johns area	3%

How many nights in total do you plan to spend in Jacksonville/St. Johns on this trip?

	<b>In-person Survey Event Influenced Visitors n=400</b>
0 or staying in own home	23%
1	18%
2	28%
3	23%
4	5%
5	2%
6	<1%
7	1%
More than a week	<1%

	<b>In-person Survey Event Influenced Visitors that Stayed Overnight in Hotel n=210</b>	<b>Online Post-Race Survey Visitors that Stayed Overnight in Hotel n=275</b>
Mean	2.23	2.31
Mode	2	2
Range	1 - 10	1 – 8

**Event Influence Visitors only**

Where are you staying?

	<b>In-person Survey Event Influenced Visitors that Stayed Overnight n=226</b>	<b>Online Post-Race Survey n=296</b>
Jacksonville (Jacksonville Beach, Atlantic Beach, Neptune Beach, and Baldwin)	84%	74%
St. Johns (St. Augustine, PonteVedra)	16%	26%

If staying overnight...

What are your overnight accommodations?

	<b>In-person Survey Event Influenced Visitors that Stayed Overnight n=308</b>	<b>Online Post-Race Survey n=296</b>
Hotel/Motel	68%	75%
Private home	25%	18%
RV/Camping	1%	1%
Renting apartment/condo	2%	1%
Airbnb	3%	4%
Other	1%	-

How much are your accommodations per night?

	<b>In-person Survey Event Influenced Visitors that Stayed Overnight n=270</b>	<b>Online Post-Race Survey n=243</b>
Mean	\$160	\$174

How many adult NON-RUNNERS came with you to Jacksonville/St. Johns?

	<b>In-person Survey Event Influenced Visitors n=183</b>
Mean	.69
Mode	0
Range	0 – 8

What type of transportation did you use to **travel to** the Jacksonville/St. Johns area?

	<b>In-person Survey Event Influenced Visitors n=400</b>
Personal Car	78%
Rental Car	3%
Airplane	19%
Train	<1%
Public Transportation	-
Recreational Vehicle	<1%
Other	<1%

What is the primary mode of transportation you are using to **get around** the Jacksonville/St. Johns area during your stay?

	<b>In-person Survey Event Influenced Visitors n=400</b>
Personal Car	83%
Rental Car	13%
Taxi/Uber	2%
Recreational Vehicle	-
Public Transportation	1%
Other	1%



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How much do you estimate that you will spend **(for yourself alone) per day** in Jacksonville/St. Johns:

	<b>In-person Survey Event Influenced Visitors n=400</b>
Specifically at the Expo	\$48.30
Restaurants, Bars, Clubs, etc. per day	\$52.20
Groceries per day	\$7.97
Shopping per day	\$22.64
Amusements and Attractions per day	\$2.95

Is this the first time you have been to the 26.2 with Donna?

	<b>In-person Survey Event Influenced Visitors n=400</b>	<b>In-person Survey Total Sample n=1020</b>	<b>Online Post-Race Survey n=850</b>
Yes	47%	45%	47%
No	53%	55%	53%

Because of your experience at the 26.2 with Donna, how likely are you to come to Jacksonville or St. Johns area again?

	<b>In-person Survey Event Influenced Visitors n=386</b>
Very Likely	82%
Somewhat Likely	15%
Somewhat Unlikely	2%
Very Unlikely	1%

## STUDY LIMITATIONS

The accuracy of economic impact estimates is dependent up on the accuracy of three inputs: visitor counts, spending averages and multipliers. Event influenced visitors were measured by direct interaction at the Expo and the reported number of adult non-runners that came to the area with runners in the survey. If visitors came to the area by themselves and did not attend the Expo, those visitors would not be counted and the total number of visitors would be underestimated, which in turn would underestimate economic impact estimates.

Spending averages were derived from the in-person survey data. Estimates from all survey data are subject to sampling errors and measurement errors. Surveys were conducted on Friday and Saturday, while the marathon events took place on Sunday. Visitors were asked to estimate their spending for days that had not yet occurred, potentially introducing more uncertainty into their estimates. The margin of error for the economic impact estimate is 4.7 percent.

The make up of the sample is also an important factor in the accuracy of the estimates. If the sample is not reflective of the true population of event influenced visitors, the economic impact estimates will not be accurate.

Sporting event multipliers come from an input-output model of the local economy; most notable for the construction of such multipliers is IMPLAN. If the sporting event multiplier of 1.7 that is used in this study is inaccurate, that will impact the veracity of the economic impact estimates.

The economic impact estimates for this report are exclusively for St. Johns and Duval County, Florida. Any spillover effects into Clay or Nassau County are not measured. There were individuals that traveled to the Northeast Florida region for the event, but did not exclusively stay in Duval or St. Johns. Spending initiated from these visitors is not part of the estimates.

## SURVEY INSTRUMENT

S1 Agreed to participate in survey

1. Yes 2. No

1. Which events are you running in this weekend? [SELECT ALL]

1. Full Marathon 2. Half Marathon 3. Team Relay 4. 10k 5. 5k  
6. Family Fun Run 7. Ultra-Marathon 8. Not Running

2. Are you a resident of Duval County or St. Johns County?

**[RESIDENTS include: St. Augustine, Ponte Vedra, Jacksonville Beach, Atlantic Beach, Neptune Beach, and Baldwin]**

1. Duval County resident **[IF RESIDENT SKIP TO Q11]** 2. St. Johns County resident **[IF RESIDENT SKIP TO Q11]** 3. Visitor

### [ONLY ASK VISITORS]

3. How many nights in total do you plan to spend in Jacksonville/St. Johns on this trip?

- 0 or Staying at own Home **[SKIP to Q6]** 1 2 3 4 5 6  
7 More \_\_\_\_\_

4. **[IF STAYING OVERNIGHT]** What are your overnight accommodations?

1. Hotel/Motel 2. Private Home **[SKIP to Q5]** 3. RV/Camping **[SKIP to Q4b]** 4. Renting Apartment/Condo **[SKIP to Q4b]** 5. Air BnB 6. Other \_\_\_\_\_ **[SKIP to Q4b]**

### **[IF STAYING in a hotel/motel/Airbnb]**

4a. Including yourself how many adults are staying in your hotel room/Air ?

\_\_\_\_\_

4b. How much are your accommodations **per night**? \_\_\_\_\_

5. Where are you staying?

1. Jacksonville (Jacksonville Beach, Atlantic Beach, Neptune Beach, and Baldwin)  
2. St. Johns (St. Augustine, Ponte Vedra)  
3. Uncertain (Provide Details) \_\_\_\_\_

6. How many adult NON-RUNNERS came with you to Jacksonville/St. Johns?

\_\_\_\_\_

7. What type of transportation did you use to **travel to** the Jacksonville/St. Johns area?

1. Personal Car 2. Rental Car 3. Airplane 4. Train 5. Public Transportation 6. Recreational Vehicle 7. Other \_\_\_\_\_



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8. What is the primary mode of transportation you are using to **get around** the Jacksonville/St. Johns area during your stay?  
1. Personal Car 2. Rental Car 3. Taxi/Uber 4. Recreational Vehicle 5. Public Transportation 6. Other \_\_\_\_\_
9. How much do you estimate that you will spend **(for yourself alone) per day** in Jacksonville/St. Johns:  
9a. Specifically at the Expo \_\_\_\_\_ 9b. Restaurants, Bars, Clubs, etc. per day \_\_\_\_\_  
9c. Groceries per day \_\_\_\_\_ 9d. Shopping per day \_\_\_\_\_ 9e. Amusements and Attractions per day \_\_\_\_\_
10. Would you say that the 26.2 with Donna:  
1. Was the main reason for your visit to Jacksonville/St. Johns area  
2. Influenced your visit, but was not the main reason for your visit to Jacksonville/St. Johns area  
3. Did not influence your decision to visit Jacksonville/St. Johns area

**[ASK EVERYBODY THE REST OF THE QUESTIONS]**

11. Is this the first time you have been to the 26.2 with Donna?  
1. Yes  
2. No
12. Because of your experience at the 26.2 with Donna, how likely are you to come to Jacksonville or St. Johns area again?  
1. Very Likely 2. Somewhat Likely 3. Somewhat Unlikely 4. Very Unlikely
13. What is your age?  
1. 18 – 24 2. 25 – 44 3. 45 – 64 4. 65 and over
14. Which category best describes your household's yearly income?  
1. Less than \$25,000 2. \$25,000 - \$50,000 3. \$50,000 - \$75,000 4. \$75,000 - \$100,000 5. Above \$100,000
15. Which category best describes the highest level of education that you completed?  
1. Less than High School 2. High School Graduate 3. Some college 4. College graduate 5. Graduate Degree

**16. [DO NOT READ QUESTION - Identify by yourself]**

**Sex of the respondent**

1. Male 2. Female