SOBEWFF®

EAT. DRINK. EDUCATE.

Profile of Attendees & Economic Impact
February 2018

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In collaboration with the Chaplin School of Hospitality & Tourism Management at Florida International University

FIU Chaplin School of Hospitality & Tourism Management

MIAMI GREATER MIAMI CONVENTION & VISITORS BUREAU

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Background and Objectives

In its 17th year, The Food Network & Cooking Channel South Beach Wine & Food Festival (SOBEWFF®) is a national, star-studded, five-day destination event showcasing the talents of the world's most renowned wine and spirits producers, chefs and culinary personalities. Hosted by Southern Glazer's Wine & Spirits and Florida International University (FIU), the Festival benefits FIU's Chaplin School of Hospitality & Tourism Management and the Southern Wine & Spirits Beverage Management Center. The Festival now attracts more than 60,000 guests annually to its 85+ events throughout the five-day weekend, which take place at various locations throughout South Florida.

The Greater Miami Convention & Visitors Bureau (GMCVB), in collaboration with the Florida International University Chaplin School of Hospitality & Tourism Management, developed a research survey tool to collect spending, demographic and other visitor information from attendees of the Festival.

Interviews were conducted during four consecutive days/events on South Beach:

Thursday, February 22, 2018 – Barilla's Italian Bites on the Beach
Friday, February 23, 2018 – Heineken Light Burger Bash
Saturday, February 24, 2018 – Goya Foods' Grand Tasting Village
Sunday, February 25, 2018 – Goya Foods' Grand Tasting Village

A total of 833 completed surveys were collected from attendees during these four days/events at the Festival.

The target audience consisted of attendees at the aforementioned large-format Festival events. Attendees were interviewed via in-person intercept. The survey was designed to:

- Determine the originating destination of event attendees
- Develop a demographic profile of attendees
- Collect information about visitor spending while staying in the Miami-Dade area
- Conduct an economic impact analysis based on the data collected to determine the festival's direct and indirect financial impact on the region

The ensuing information is geared towards assisting the planning committee in developing marketing initiatives to further promote and expand the event.

Executive Summary

- Less than half of those in attendance were residents of Miami-Dade. When including residents from nearby counties, two-thirds of total respondents were “locals”.
- One in four attendees were from other parts of the U.S. International representation consisted of a relatively smaller proportion of people coming from outside the country.
- Over half of those from outside of the area stayed in hotels/motels, and a small proportion of attendees stayed in rentals (including AirBnB). The vast majority of those using paid accommodations were staying in Miami-Dade, and, in particular, Miami Beach.
- Transportation used to get to the area was evenly split amongst fly versus drive. In terms of getting to the Festival events, the largest proportion of attendees arrived by car and about a third utilized ride-sharing services.
- More than half of those surveyed said they came to the area *specifically* for SOBEWFF®, followed by a substantial proportion of attendees who said their primary purpose of visit was for vacation.
- Paid lodging use was highest on Thursday, and declined by day. Similarly, the proportion of locals versus out-of-towners also changed during the same period, as the percentage of people from out-of-town rivaled that of locals on Thursday. By Sunday, half of those in attendance were from Miami-Dade, and another quarter came from nearby Broward, Palm Beach and Monroe Counties.
- On Thursday at Barilla’s Italian Bites on the Beach, demographics of those in attendance skewed toward Caucasian, married couples who were slightly older and had higher incomes. As the Festival progressed, the crowd tended to be younger, more Hispanic/Latino and single/never married at the other events surveyed.

Economic Impact of SOBEWFF®

- Direct expenditures by overnight visitors to Greater Miami and the Beaches who came to the area to attend the Food Network & Cooking Channel South Beach Wine & Food Festival are estimated from visitor-reported spending collected during the survey conducted at the aforementioned events. Visitors were asked for average daily expenditures on lodging, food, local transportation, entertainment, shopping and other related expenses for their party, as well as for the number of people within their immediate travel party.
- These figures are run through the Destinations International Event Impact Calculator. The 2018 Food Network & Cooking Channel South Beach Wine & Food Festival had a total Miami-Dade County economic impact of more than $20.5 million in *direct expenditures*. Furthermore, over $13.7 million in *indirect/ induced expenditures* were also generated as a result of the event – creating a total economic impact of **more than *$34.2 million***.
- Locally, 5,027 jobs were directly supported by the event and 2,146 jobs were indirectly supported; for a net total of 7,173 jobs supported.
- More than $2.1 million in local taxes were generated by the Festival, along with an estimated hotel room demand of 30,576 nights.
- During the week of the Festival, hotel occupancy (88.9%) and average daily room rates ($390.32) on Miami Beach were up compared to the same time period/area in 2017. This created an estimated tax revenue gain of 15.9% over the prior year on Miami Beach.
- SOBEWFF®'s size/impact in relation to other events that take place in and around Miami showed that other events tended to have a comparable, sometimes greater, impact. For example, the Coconut Grove Arts Festival taking place the week prior drew more than 120,000 people over three days. Hotel metrics in the area during the week of that event mirrored those during the same week of SOBEWFF®; albeit, this event has much higher attendance than SOBEWFF®.
- Taking place at the beginning of March, 2018 Carnival Miami Festival drew a larger number of attendees. One of its signature events, Calle Ocho, regularly draws in excess of 100,000 attendees. All inclusive, that event had a reported economic impact of $40 million.

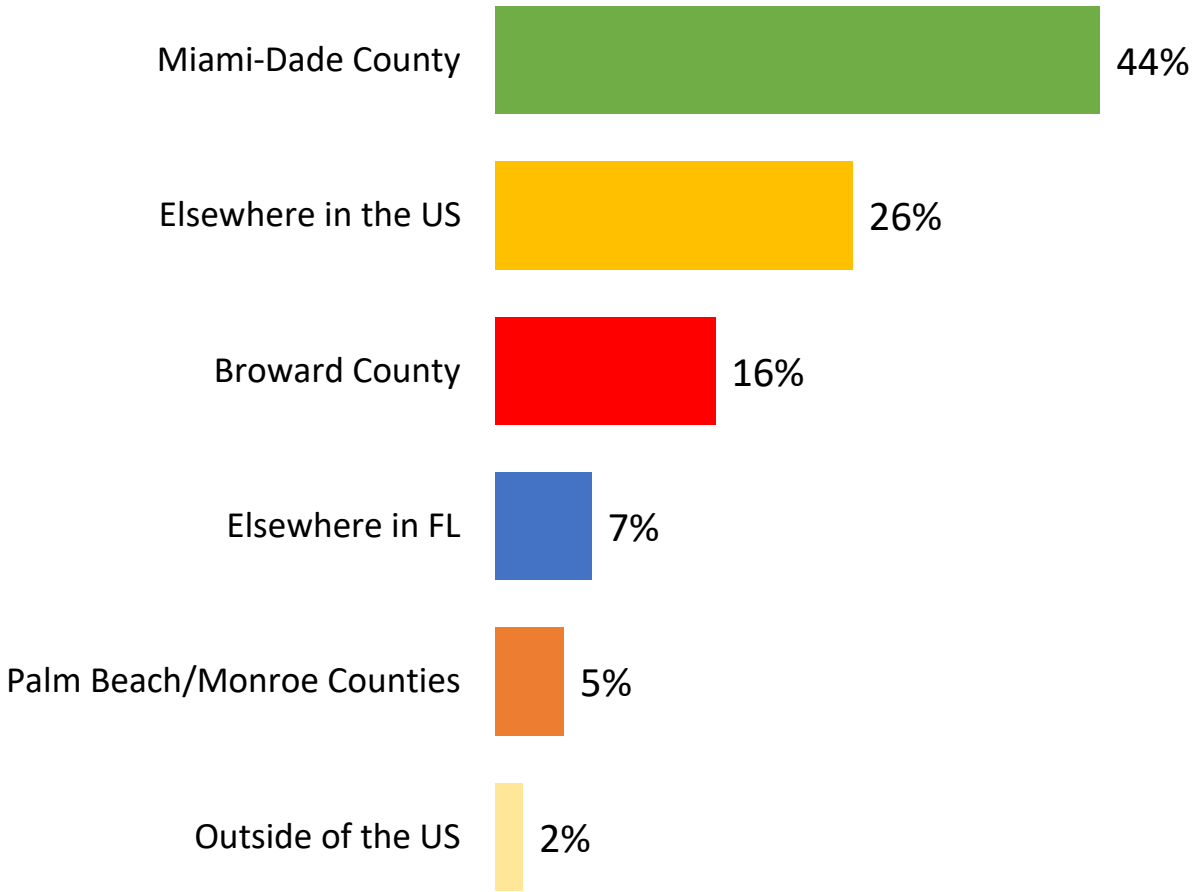
Detailed Responses

Part 1 - Attendee Characteristics

Place Of Residence

Less than half of those in attendance were from Miami-Dade. When including residents from nearby counties, two-thirds of total respondents were “locals”.

One in four event attendees were from other parts of the U.S.



Q1. Where is your PRIMARY residence?
Base: Total respondents

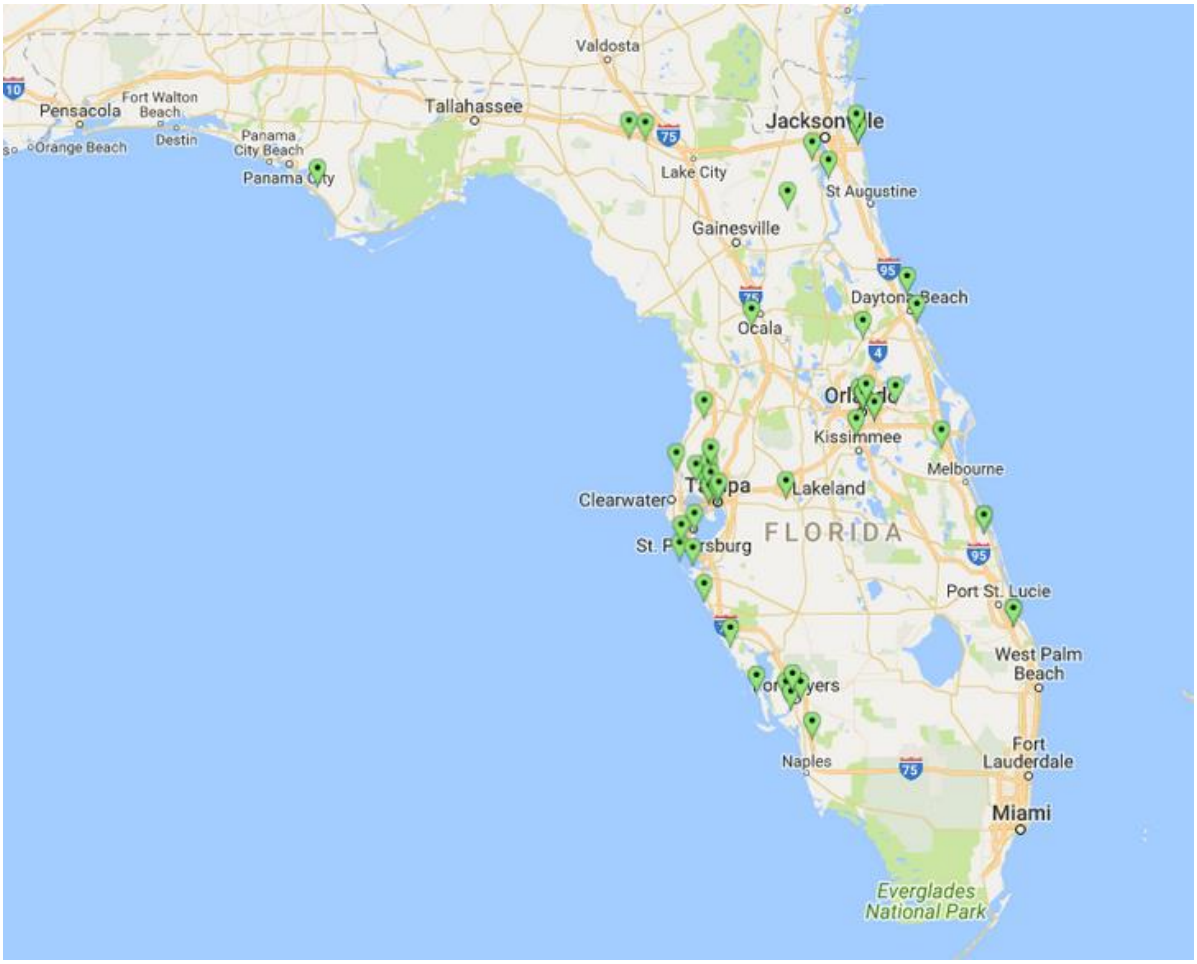
Place Of Residence - Elsewhere in Florida

Of those who came from other parts of Florida, many were from West Coast areas such as Tampa and Fort Meyers.

Others resided in central Florida areas, like Orlando.

7%

Came from areas within the state, outside of South Florida



Place Of Residence - Elsewhere in the U.S.

Out-of-state event attendees came from all over the country, with a higher concentration of visitors coming from the Northeast and Midwest.

Quite a few people also came from metropolitan areas in Texas and California.

26%

Came from other parts of the U.S.



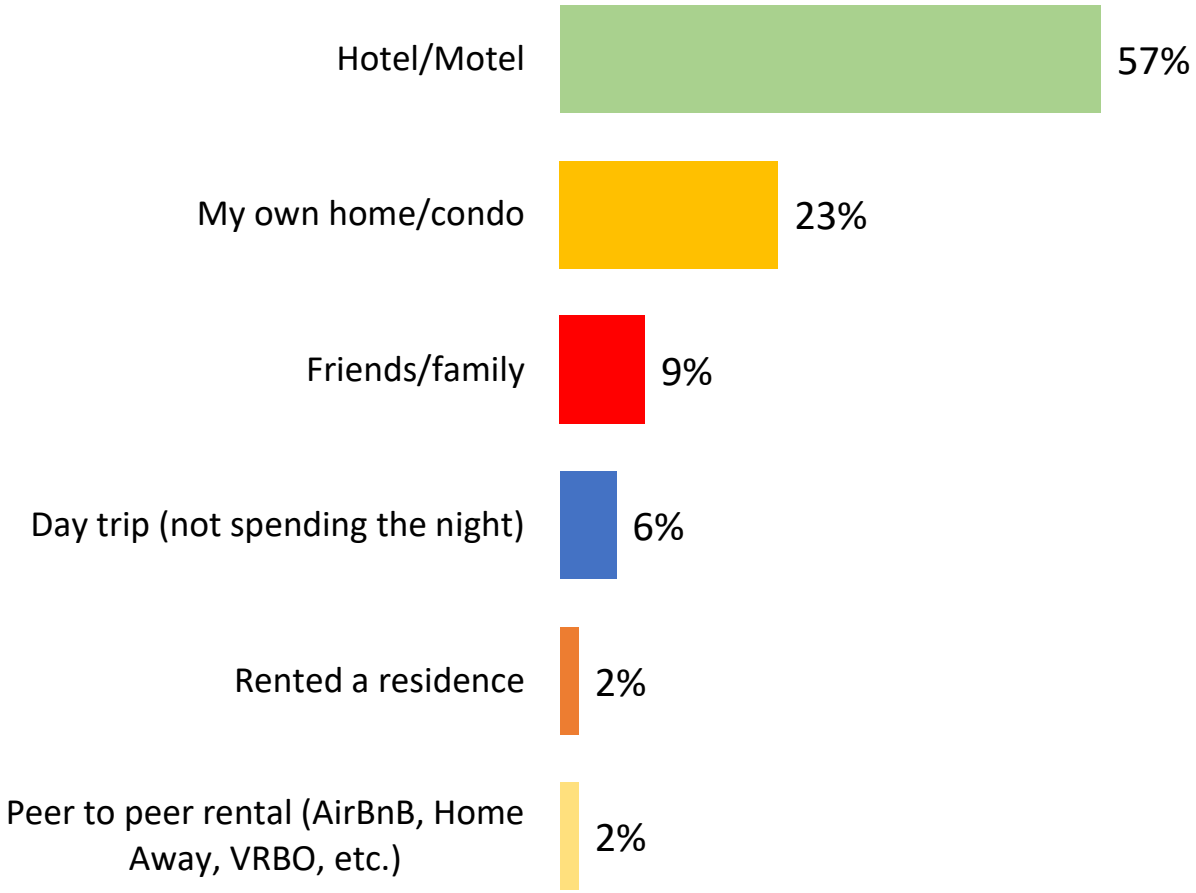
Q1. Where is your PRIMARY residence?
Base: Total respondents

Type Of Lodging

More than half of out-of-town visitors stayed at a hotel/motel. Very few people said they were renting a residence or using peer-to-peer rentals through AirBnB.

A quarter of attendees said they were staying at their own residences and/or just in town for the day.

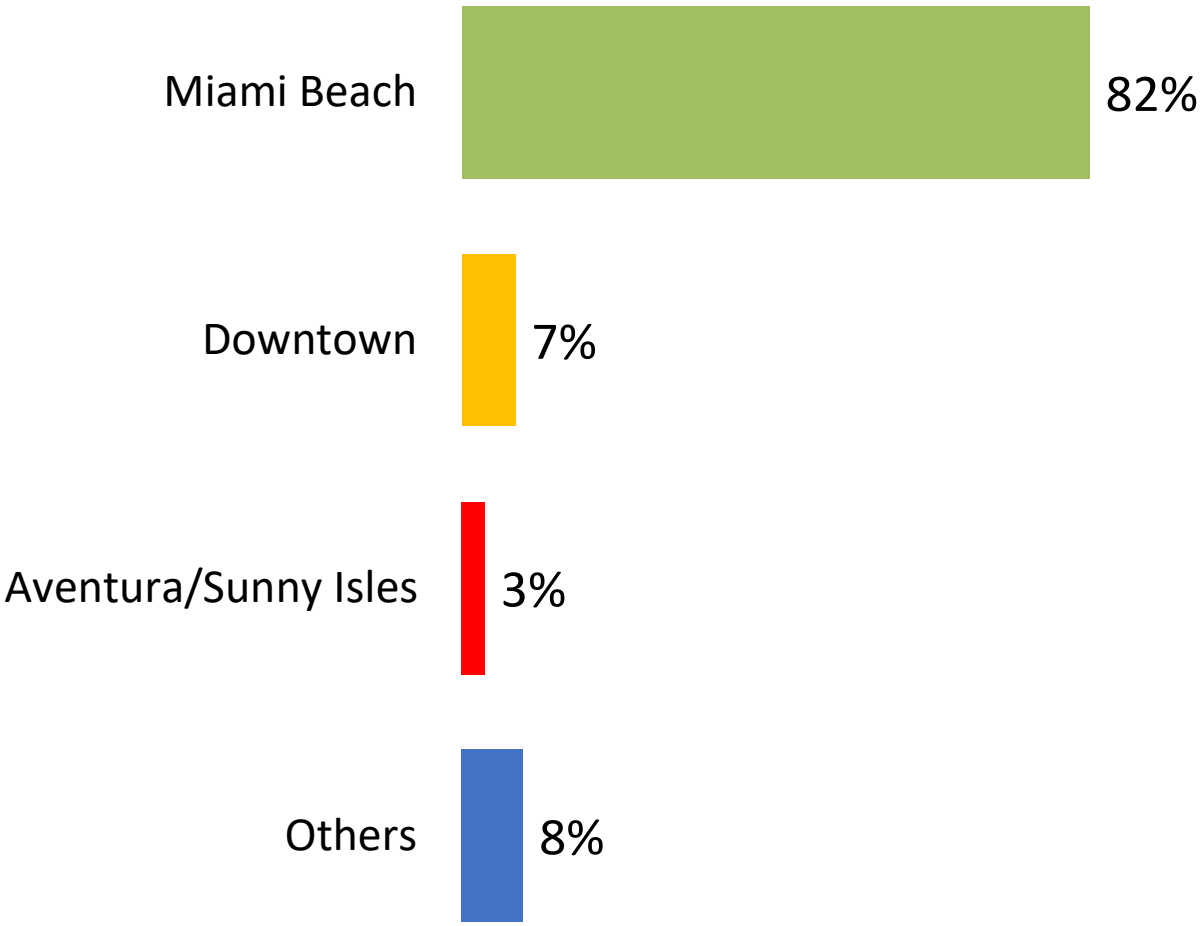
90% of total visitors who used paid lodging stayed in Miami-Dade



Q7. What type of lodging are you using during your visit?
Base: Do not reside in Miami-Dade
Q7a. Is your lodging in Miami-Dade County?
Base: Staying in paid lodging in Miami-Dade

Area Of Lodging In Miami-Dade

Attendees of SOBEWFF® who were using paid lodging most often said they were staying in Miami Beach. Handfuls of visitors said they were staying in Downtown or Aventura/Sunny Isles.

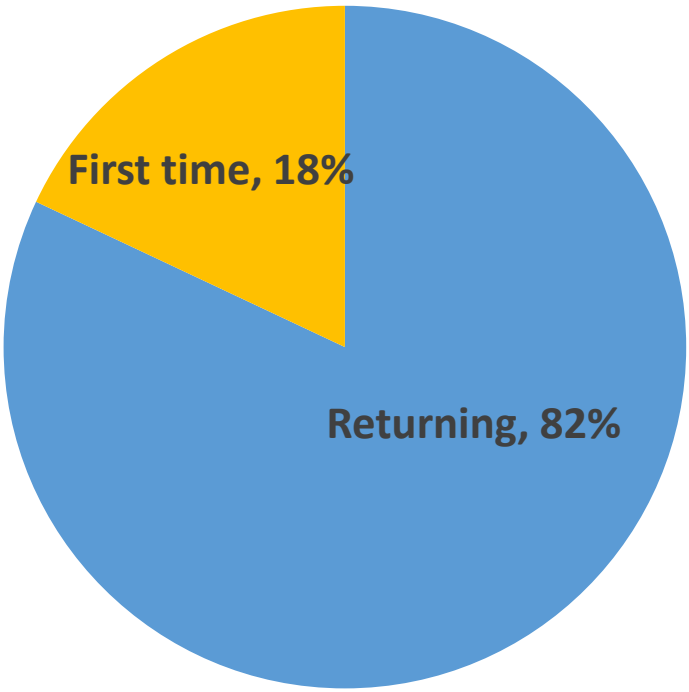


Q8. What area is your lodging located?
Base: Using lodging in Miami-Dade

Visitation To Miami-Dade

A majority of people who came from out of the area indicated they had been to Miami-Dade before. Only about one in five respondents said this was their first time.

Those who have been to the area before say they have been here quite a few times.



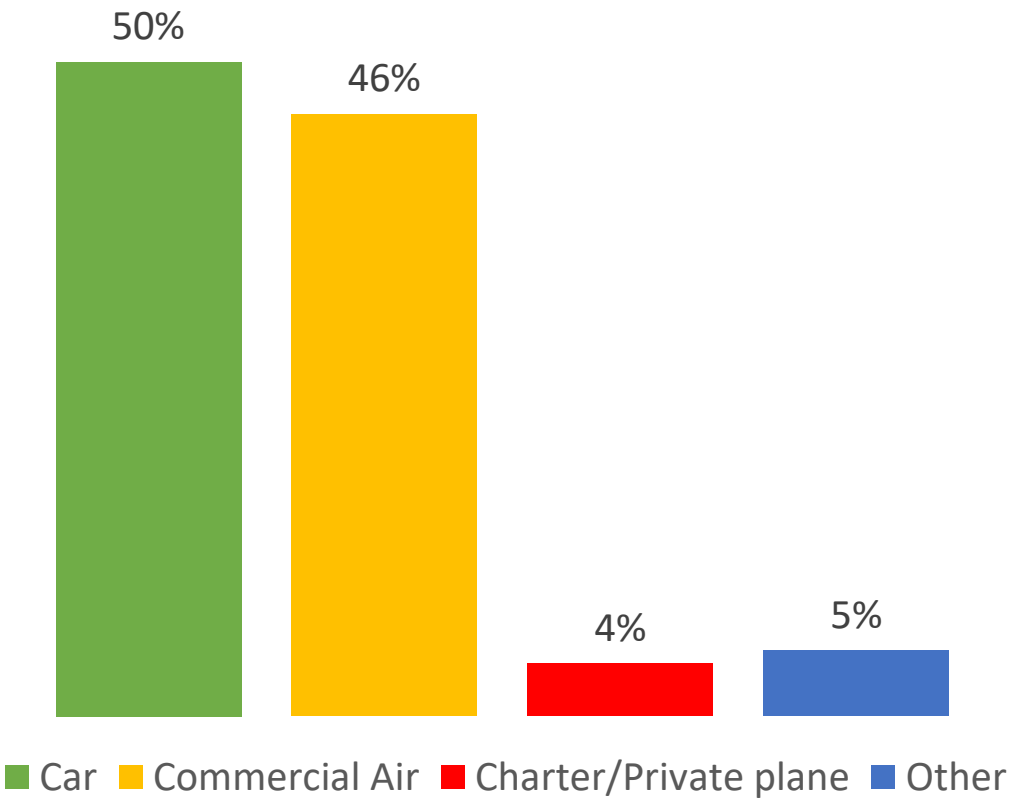
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Median number of previous visits to Miami-Dade among returning visitors

Q4. Is this your first visit to the Greater Miami area (including Brickell, Doral, Coconut Grove, etc.)?
Base: Do not reside in Miami-Dade
Q4a. How many times have you visited before?
Base: Visited Miami-Dade before

Means Of Transportation To Miami-Dade

The main forms of transportation to the Miami-Dade area amongst visitors was nearly evenly split between automobiles and air.

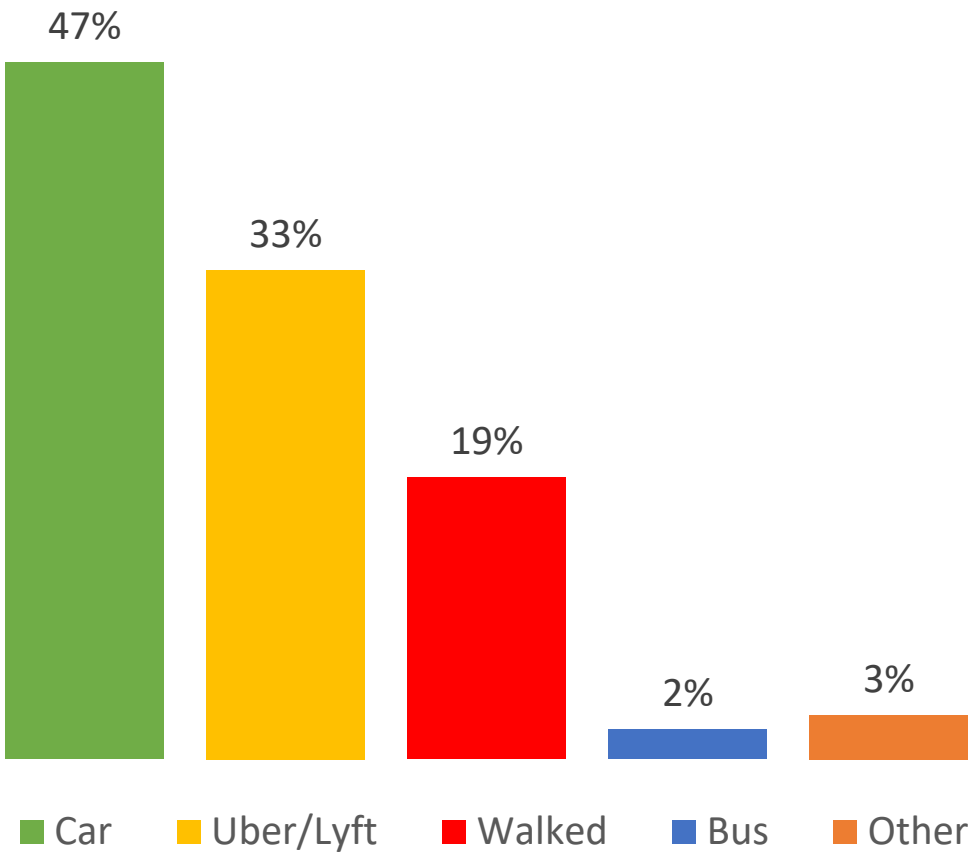


Q6. What means of transportation did you use for this trip to the Greater Miami Area? Please select all that apply.
Base: Do not reside in Miami-Dade County

Means Of Transportation to SOBEWFF®

Almost half of those who came to the event used an automobile. One third used a ride-sharing service.

One in five attendees said they just walked to the event.

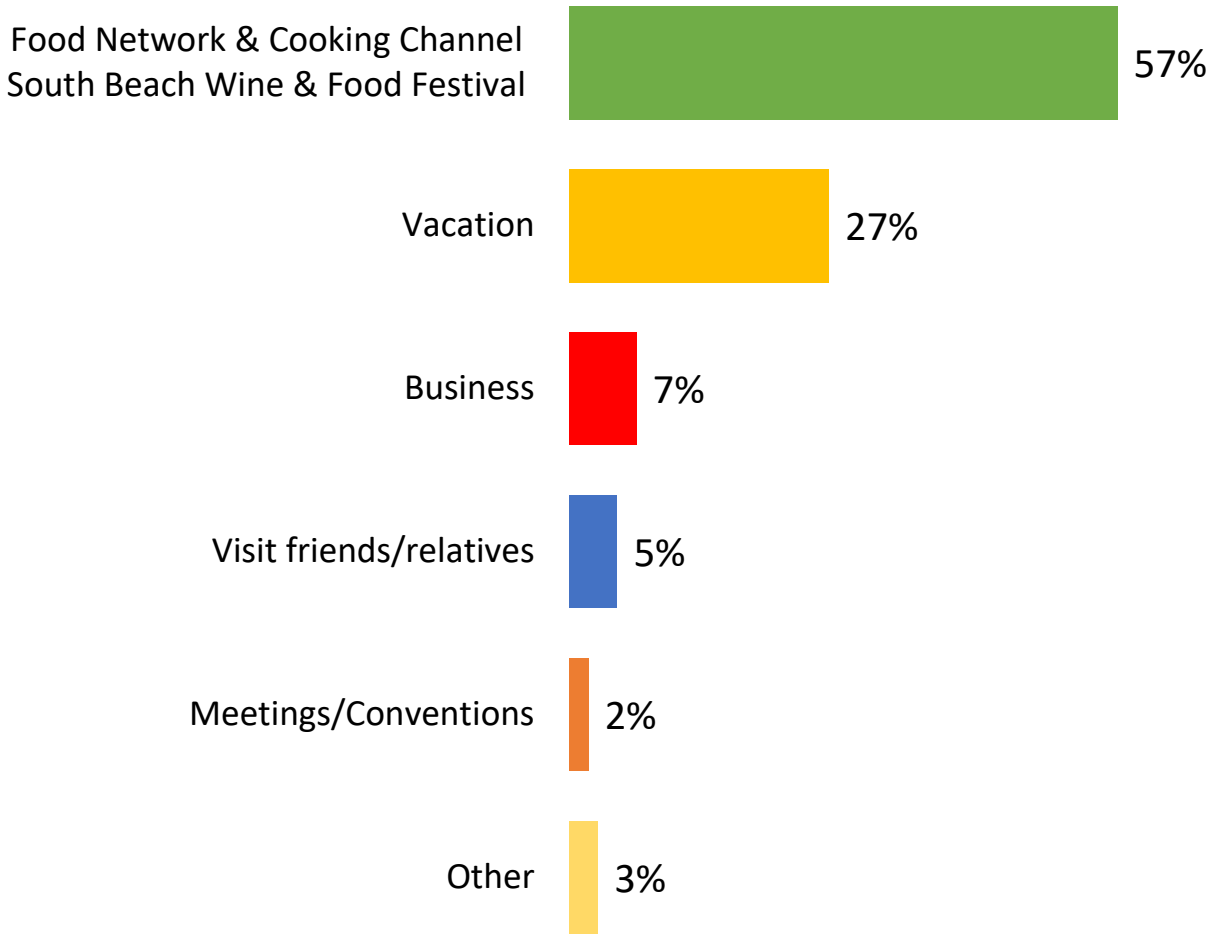


Q11. What means of transportation did you use to arrive here at the Food Network & Cooking Channel South Beach Wine & Food Festival? Please select all that apply.
Base: Total Respondents

Main Reason For Visiting Area

Attending the event was the reason most often mentioned by respondents when asked why they were visiting the Miami-Dade area. About one in four of those surveyed said their main reason was for a vacation.

Relatively few people said they were in the area for business, visiting friends/relatives or for attending meetings/conventions.



Q10. What is your main reason for visiting the Greater Miami-Dade area?
Base: Do not reside in Miami-Dade

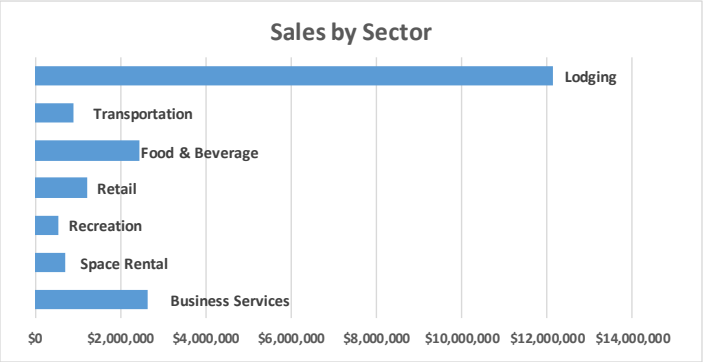
Detailed Responses

Part 2 - Economic Impact Category Breakdown

Economic Impact Of SOBEWFF®

Event Parameters		Key Results	
Event Name:	SOBE Wine & Food Festival	Business Sales (Direct):	$20,507,366
Organization:	FIU	Business Sales (Total):	$34,287,432
Event Type:	Performing arts (concerts, theater, dance)	Jobs Supported (Direct):	5,195
Start Date:	2/22/2018	Jobs Supported (Total):	2,218
End Date:	2/25/2018	Local Taxes (Total):	$2,102,766
Overnight Attendees:	20,891	Net Direct Tax (ROI):	$1,926,101
Day Attendees	12,804	Estimated Room Demand:	30,576

Direct Business Sales



Lodging	$12,135,335
Transportation	$876,825
Food & Beverage	$2,444,367
Retail	$1,210,360
Recreation	$528,855
Space Rental	$695,302
Business Services	$2,616,322
TOTAL	$20,507,366

Economic Impact Details

	Direct	Indirect/Induced	Total
Business Sales	$20,507,366	$13,780,066	$34,287,432
Personal Income	$6,864,388	$4,453,102	$11,317,490
Jobs Supported	5,195	2,218	7,413
Taxes and Assessments			
Federal Total	$1,855,075	$1,228,351	$3,083,426
State Total	$1,481,281	$472,658	$1,953,939
Local Total	$1,926,101	$176,665	$2,102,766
Property Tax	$372,024	$180,872	$552,896

Estimated Room Demand Metrics

Room Nights (total)	30,576
Peak Rooms	10,446
Total Visitor Days	70,754

Source: Destinations International Event Impact Calculator

Detailed Responses

Part 3 - Demographics

Demographics

Gender		**Ethnicity**	
Female	65%	American Indian/Native American	6%
Male	34%	Asian	4%
Prefer not to answer	1%	Black/African American	6%
		Caribbean	3%
Age		Caucasian	45%
21 - 25	9%	Hispanic/Latino	32%
26 - 35	26%	Multi-racial	3%
36 - 45	22%	Other	5%
46 - 55	24%		
56 - 65	14%	**Household income**	
Over 65	4%	Less than $20,000	2%
		$20,000 to $39,999	3%
Marital status		$40,000 to $59,999	9%
Single, never married	32%	$60,000 to $79,999	8%
Married	58%	$80,000 to $99,999	9%
Separated, divorced or widowed	10%	$100,000 to $119,999	10%
		$120,000 to $139,999	6%
Education		$140,000 to $159,999	6%
Some high school	0%	$160,000 or more	31%
High school graduate or equivalent	6%	Prefer not to answer	16%
Some college (incl. 2 year degree)	13%		
College (4 year degree)	42%	Average travel party size	2.6
Graduate or professional degree	38%	Average length of stay	3.5 nights
Other education	2%		

Demographics – By Day/Event

	2/22 BIB	2/23 HBB	2/24 GGTV	2/25 GGTV
Gender				
Female	63%	66%	63%	68%
Male	37%	33%	36%	31%
Prefer not to answer	0%	1%	1%	1%
Age				
21 - 25	6%	10%	11%	10%
26 - 35	21%	26%	26%	29%
36 - 45	25%	23%	22%	21%
46 - 55	24%	25%	23%	26%
56 - 65	20%	14%	15%	10%
Over 65	4%	3%	3%	5%
Marital status				
Single, never married	23%	29%	38%	38%
Married	68%	60%	56%	49%
Sep./divorced/widow	9%	11%	6%	14%
Education				
Some high school	1%	1%	0%	0%
High school graduate	3%	2%	5%	10%
Some college/2 yr degree	11%	15%	10%	14%
College (4 yr degree)	41%	43%	49%	35%
Grad/prof. degree	43%	36%	34%	39%
Other education	1%	3%	2%	2%

	2/22 BIB	2/23 HBB	2/24 GGTV	2/25 GGTV
Ethnicity				
Native American	9%	5%	9%	3%
Asian	7%	2%	3%	6%
Black/African American	3%	7%	7%	6%
Caribbean	3%	2%	3%	3%
Caucasian	52%	49%	40%	41%
Hispanic/Latino	22%	31%	32%	40%
Multi-racial	2%	2%	5%	4%
Other	6%	5%	4%	4%
Household income				
Less than $20,000	1%	2%	3%	2%
$20,000 to $39,999	2%	3%	1%	4%
$40,000 to $59,999	5%	7%	11%	10%
$60,000 to $79,999	8%	7%	6%	11%
$80,000 to $99,999	10%	6%	9%	11%
$100,000 to $119,999	10%	10%	9%	11%
$120,000 to $139,999	5%	6%	8%	6%
$140,000 to $159,999	2%	9%	6%	6%
$160,000 or more	40%	28%	34%	23%
Prefer not to answer	14%	22%	13%	16%
Average travel party size	2.0	2.8	2.5	2.6
Average length of stay	4.1	3.6	3.0	3.4

LEGEND: **BIB**: Barilla's Italian Bites on the Beach
HBB: Heineken Light Burger Bash
GGTV: Goya Foods' Grand Tasting Village

Residency And Type Of Lodging – By Day/Event

Hotel/motel use was most prevalent by those who attended Barilla's Italian Bites on the Beach on Thursday, and gradually declined over the next several days. By Sunday, day-trippers and those staying at their own homes accounted for about half of all attendees from outside of Miami-Dade.

Sunday was perhaps the most "local" day, as about four out of five attendees surveyed at Goya Foods' Grand Tasting Village were from South Florida.

	2/22 BIB	2/23 HBB	2/24 GGTV	2/25 GGTV
Miami-Dade County	38%	51%	37%	51%
Broward County	10%	13%	18%	21%
Palm Beach/Monroe Counties	5%	3%	4%	6%
Elsewhere in FL	4%	5%	13%	5%
Elsewhere in the USA	38%	28%	26%	15%
Outside of the USA	4%	1%	2%	2%

Q1. Where is your PRIMARY residence?
Base: Total respondents

	2/22 BIB	2/23 HBB	2/24 GGTV	2/25 GGTV
Hotel/Motel	74%	63%	59%	32%
Own home	14%	20%	22%	37%
Friends/relatives	6%	8%	9%	14%
Rent a residence	3%	2%	2%	2%
Peer to peer rental	2%	1%	3%	2%
Day trip (not spending a night)	2%	6%	4%	11%

Q7. What type of lodging are you using during your visit?
Base: Do not reside in Miami-Dade