The Florida Senate

COMMITTEE MEETING EXPANDED AGENDA

COMMERCE AND TOURISM
Senator Detert, Chair
Senator Abruzzo, Vice Chair

MEETING DATE: Monday, October 7, 2013
TIME: 4:00 —6:00 p.m.
PLACE: *Toni Jennings Committee Room,* 110 Senate Office Building

MEMBERS: Senator Detert, Chair; Senator Abruzzo, Vice Chair; Senators Bean, Hays, Hukill, Margolis, Richter, Ring, Simpson, Stargel, and Thompson

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
1	Presentation by All Aboard Florida on the intercity passenger rail service project from South Florida to Central Florida and the expected impacts on the economy, tourism, and other sectors		
2	Demonstration by the Department of Economic Opportunity of the new Incentives Portal as required by CS/CS/HB 7007 (SB 1024; ch. 2013-39, L.O.F.)		
3	Presentation by Film Florida on outcomes from regional workshops and forums		
4	Presentation by Visit Florida on detailed funding allocations for FY 2013-14		
	Other Related Meeting Documents		
	An electronic copy of the Appearance Request form is available to download from any Senate committee page on the Senate's website, www.flsenate.gov		

ALL ABOARD FLORIDA

Rusty Roberts, Vice President – Corporate Development
Florida East Coast Industries

Florida Senate – Committee on Commerce and Tourism

Monday, October 7, 2013

TRANSFORMING FLORIDA

Florida East Coast
INDUSTRIES

FLAGLER™	South Florida LOGISTICS SERVICES	Parallel INFRASTRUCTURE	ALL ABOARD FLORIDA
COMMERCIAL REAL ESTATE	LOGISTICS SOLUTIONS	ROW MANAGEMENT	PASSENGER RAIL

A NEW IDEA…

EFFORTLESS

Orlando

ECONOMIC DEVELOPMENT

GUEST EXPERIENCE

DESTINATION

West Palm Beach

TRANSFORMATIVE

CONNECTIVITY

MOBILITY

Seamless

Fort Lauderdale

ENVIRONMENTALLY FRIENDLY

HOSPITALITY

Miami

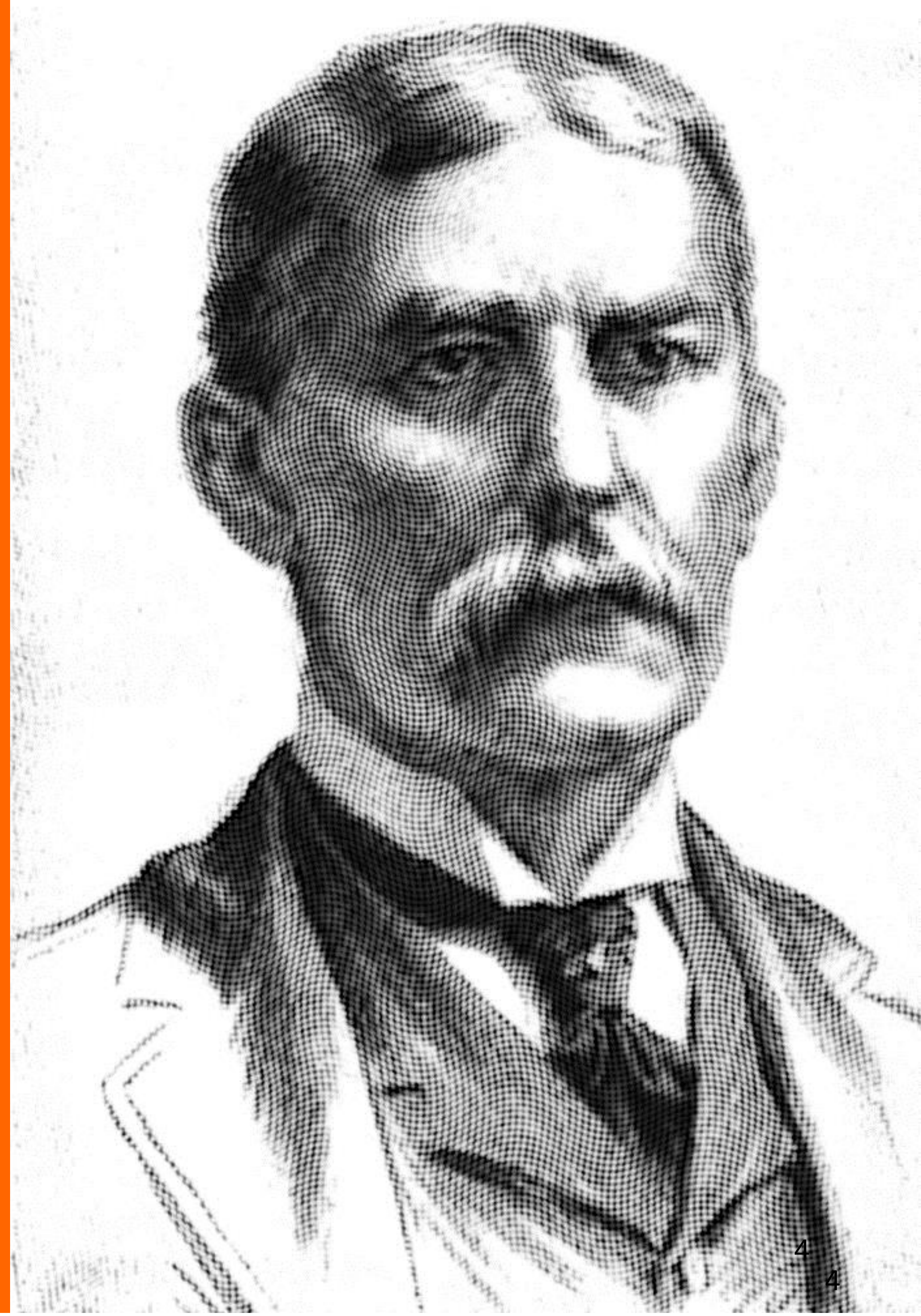
FUNCTIONAL

FLEXIBILITY

PIONEERING

time

ROOTED IN HISTORY



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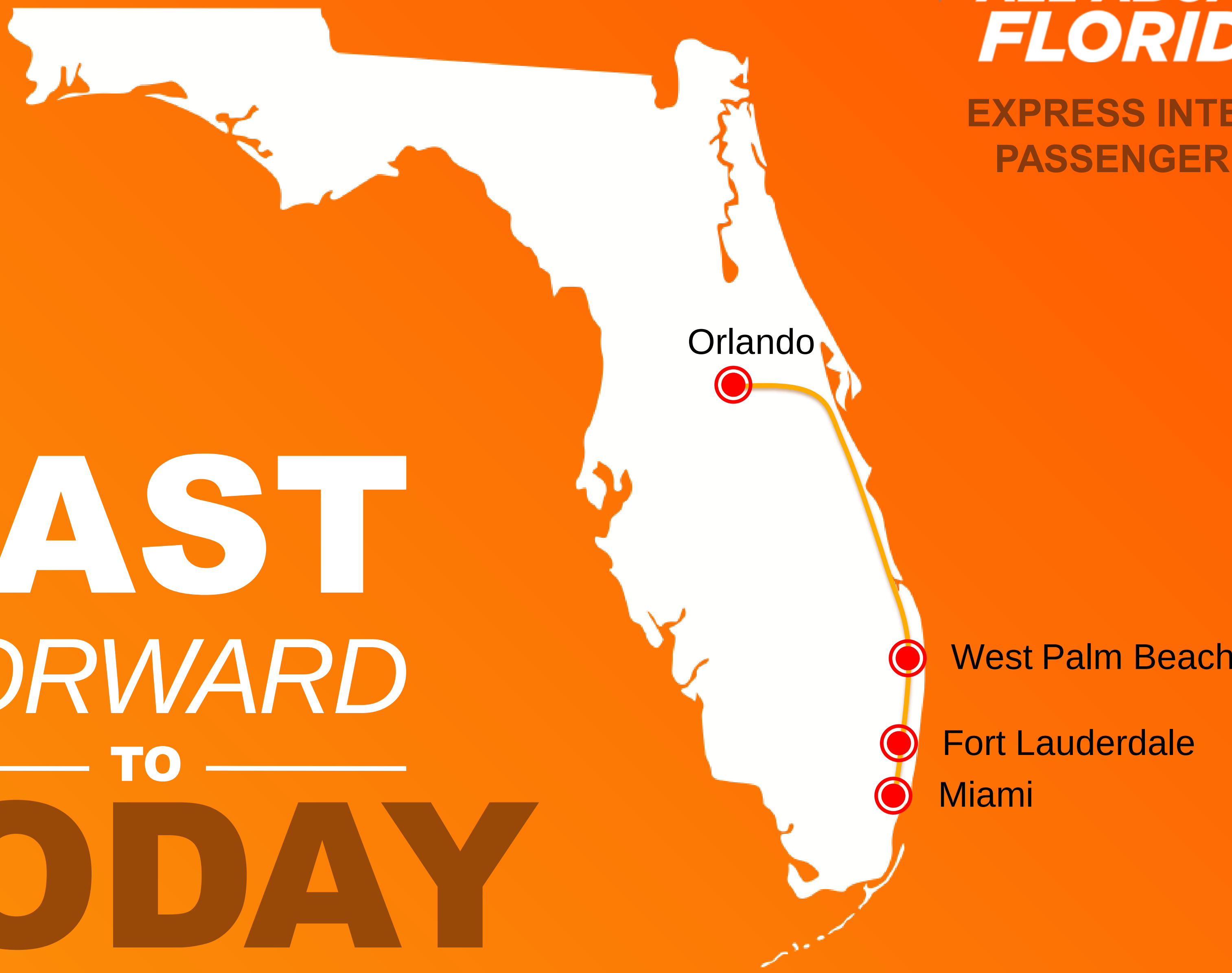
1890's INFRASTRUCTURE BACKBONE CATALYZES DEVELOPMENT OF FLORIDA

ALL ABOARD FLORIDA

EXPRESS INTERCITY PASSENGER RAIL



FAST *FORWARD* TO TODAY

IMAGINE A FASTER, RELIABLE & MORE CONVENIENT WAY TO TRAVEL

- 3 hour trip between downtown Miami and Orlando
- Hourly scheduled service starting in the morning with late departures
- Consistent and competitive service

MORE THAN **50M** CURRENT TRAVELERS EXPERIENCE **CHALLENGING OPTIONS**

Travel by car
is unpredictable

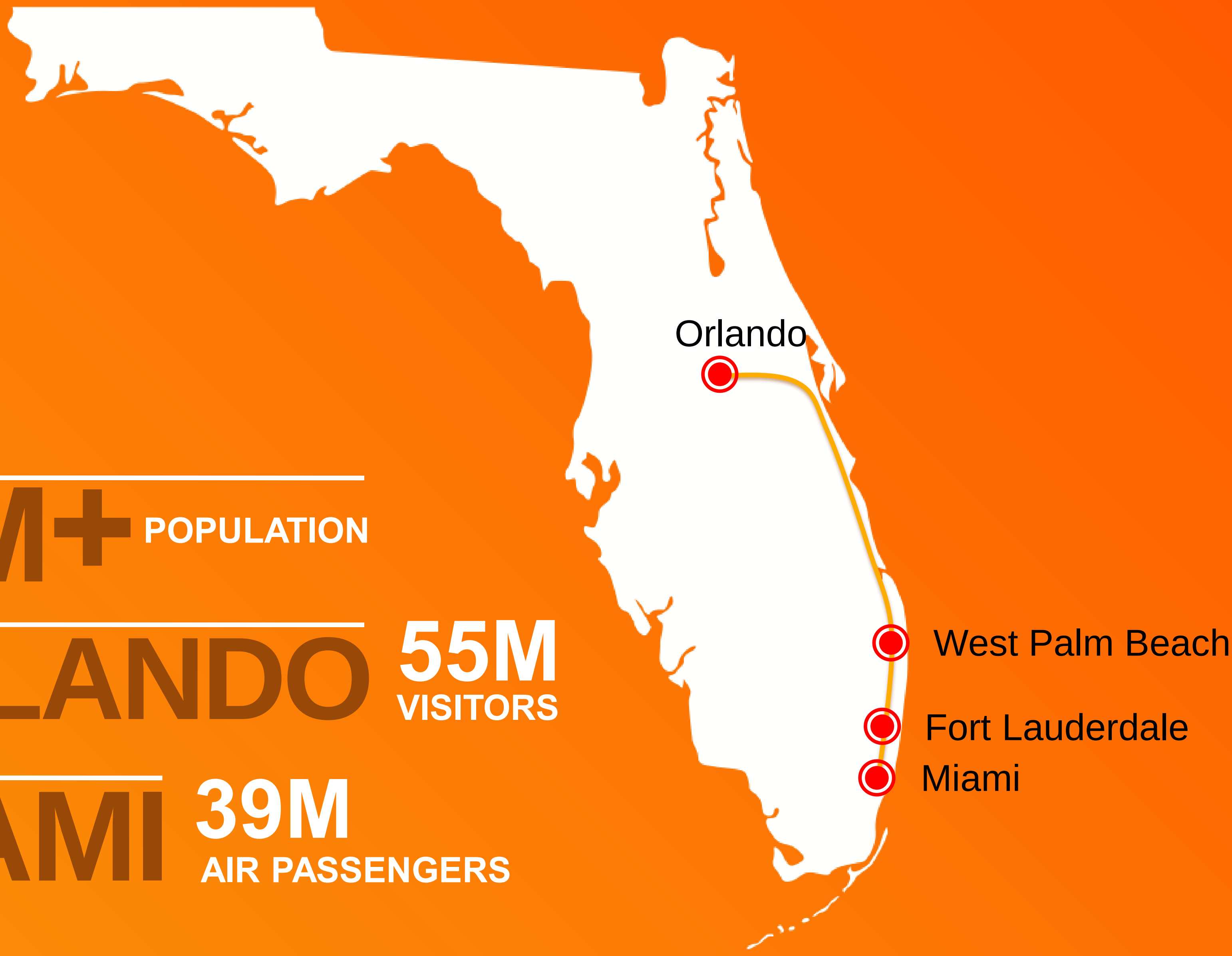
Travel by plane
is uncontrollable

ALL ABOARD FLORIDA WILL **CONNECT FLORIDA'S KEY CITIES IN A NEW WAY TO SPARK SOCIAL AND ECONOMIC OPPORTUNITIES.**

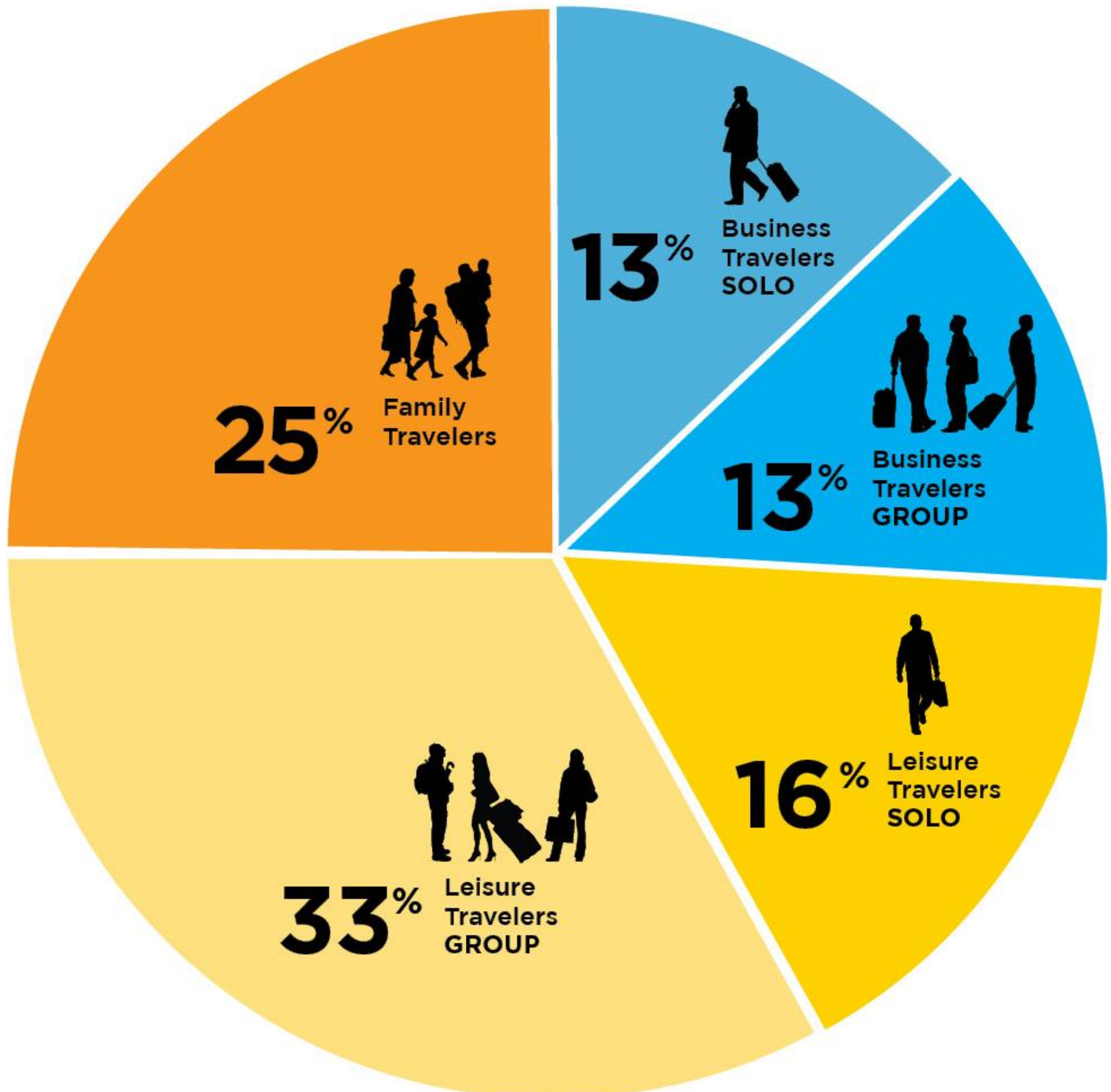
19M+ POPULATION

ORLANDO **55M** VISITORS

MIAMI **39M** AIR PASSENGERS



DIVERSE MARKET



OPERATION DETAILS

- Hourly northbound and southbound service starting in the early morning and ending in the evening
- Trains will travel
  - Up to 79 mph between Miami and West Palm Beach
  - Up to 110 mph between West Palm Beach and Cocoa
  - Up to 125 mph between Cocoa and Orlando
- Speed is based on factors such as curvature, signaling, track condition and the number of grade crossings

SERVICE DETAILS

All Aboard Florida's passenger trains will

- Be faster and lighter than the freight trains that currently operate in the existing rail corridor
- Consist of two locomotives and seven passenger cars – train sets will be less than 1,000 feet
- Clear intersections in less than a minute
- Use clean-diesel fuel and meet the highest emissions standards

Differences Between Freight and Passenger Trains in the Existing Rail Corridor		
	Freight Current Conditions	**Passenger Expected Conditions**
Average train length	7,800 feet	900 feet
Trains per day	18	32
Average speed	38 – 52 mph	79 – 125 mph

A product designed specifically for a targeted market combining

TRAVEL, LEISURE & ENTERTAINMENT

- Center city locations
- Custom designed coaches & services
- Intermodal connectivity

SUCCESS FACTORS

EXISTING TRANSPORTATION CORRIDOR

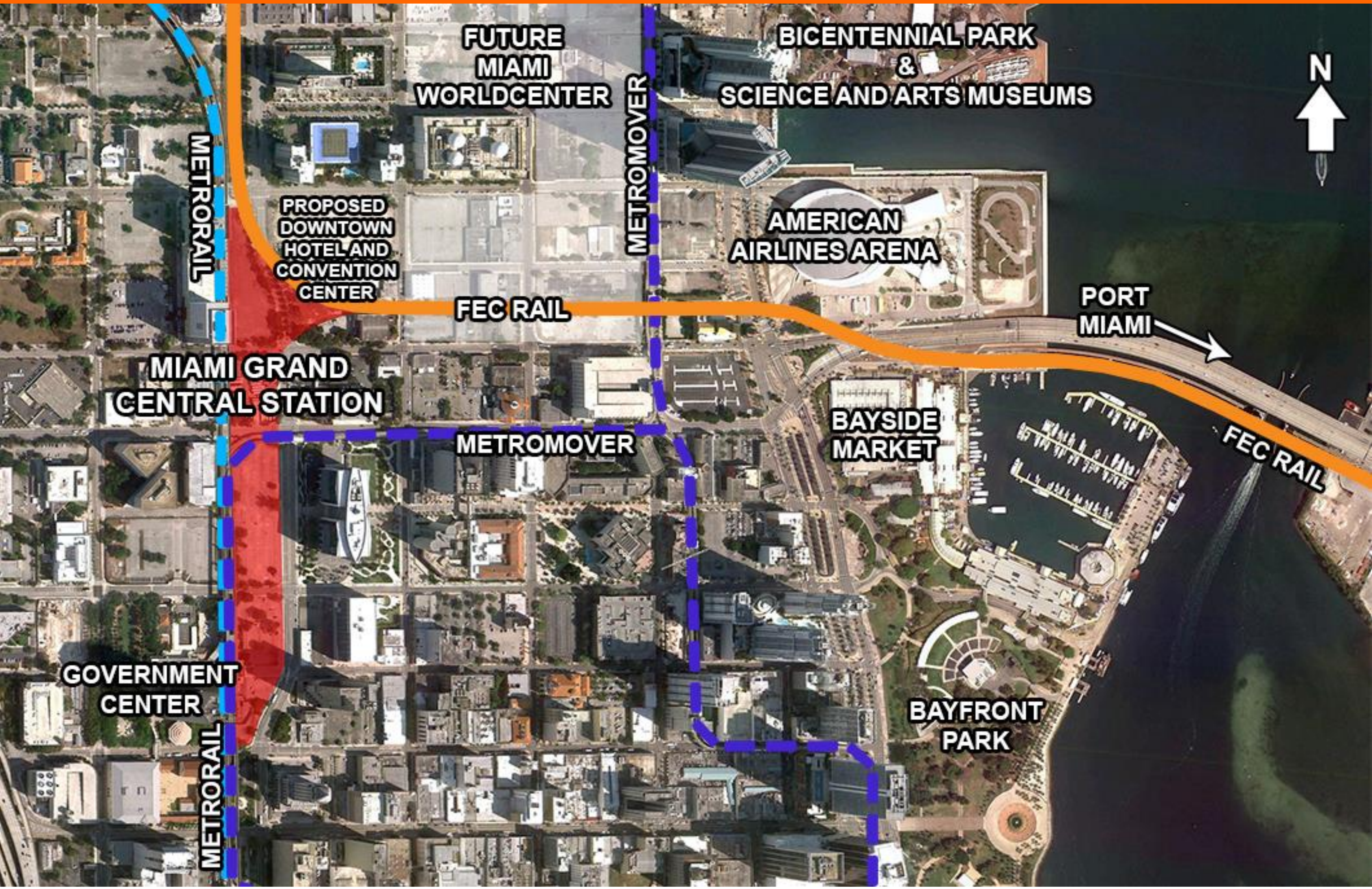
3

HOUR TRAVEL TIME

ADVANCED, CONVENTIONAL TECHNOLOGY

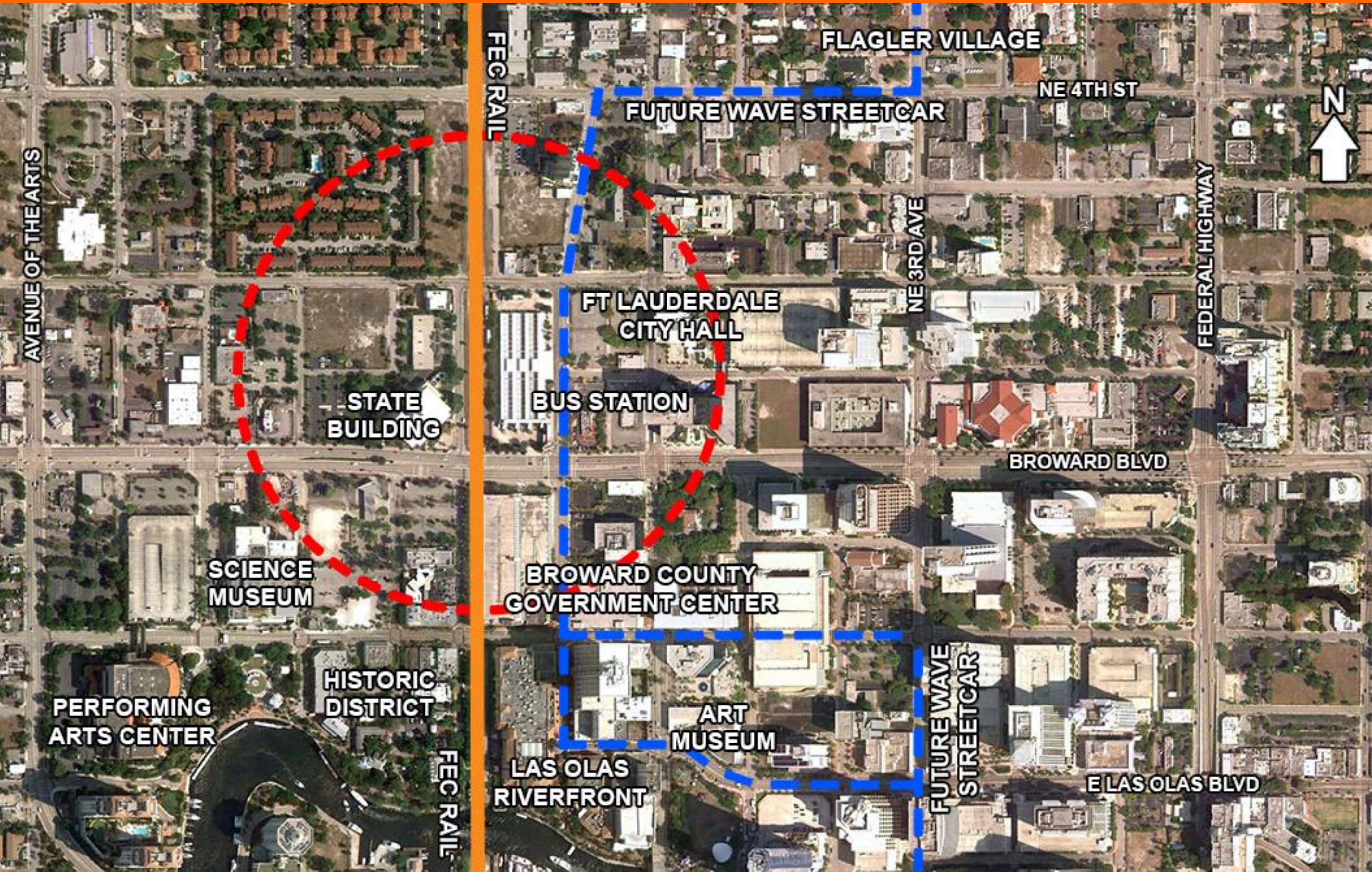
STRATEGIC STATION LOCATIONS

MIAMI – TRANSFORMING DOWNTOWN

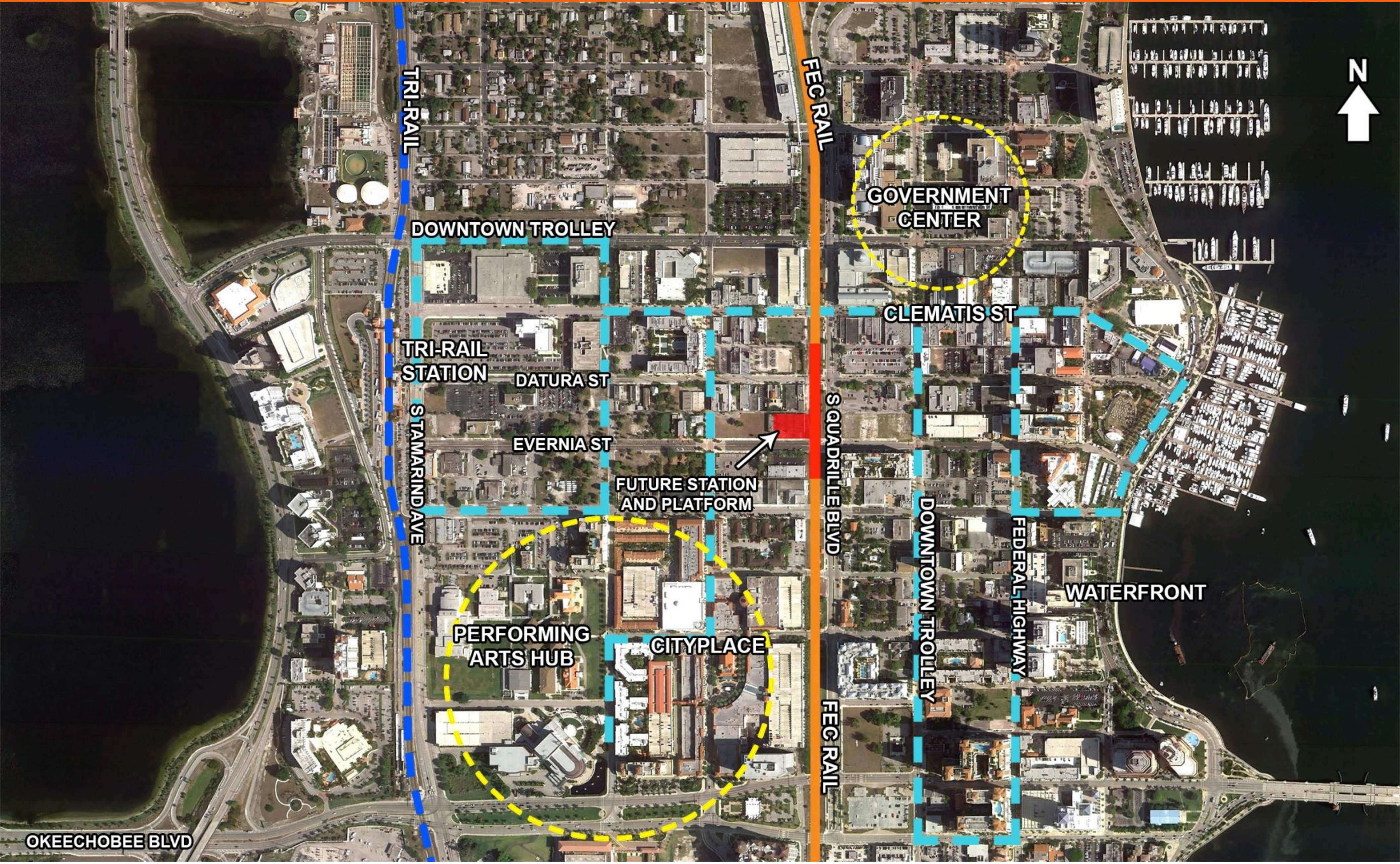


MIAMI – 9 ACRE DEVELOPMENT

FORT LAUDERDALE - REVITALIZING NORTH OF BROWARD BOULEVARD



WEST PALM BEACH – CONNECTING TWO MAJOR DOWNTOWN DESTINATIONS



ORLANDO – INTERMODAL HUB

ORLANDO – INTERMODAL HUB

MOVING FORWARD

COMPLETED ACTIVITIES

- ✓ Selected master planner and environmental engineering firms
- ✓ Completed Environmental Assessment for Miami to West Palm Beach segment and received Finding of No Significant Impact Statement
- ✓ Hired key management
- ✓ Finalized negotiations with FDOT and OOCEA for access to SR 528
- ✓ Finalized negotiations with Greater Orlando Aviation Authority for terminal station

ONGOING ACTIVITIES

- ❑ Environmental Impact Statement Process between West Palm Beach and Orlando
- ❑ Determine financing structure
- ❑ Announce new brand
- ❑ Select rolling stock provider
- ❑ Engage third party operating partner
- ❑ Begin rail infrastructure and station construction by end of 2013

WHAT DOES THIS MEAN FOR FLORIDA?

A **win** for rail in Florida and opportunity to set a new standard for privately funded intercity passenger rail in the country

Transit-oriented development – job & development opportunities

Tens of thousands of jobs

New markets

Entrepreneurialism

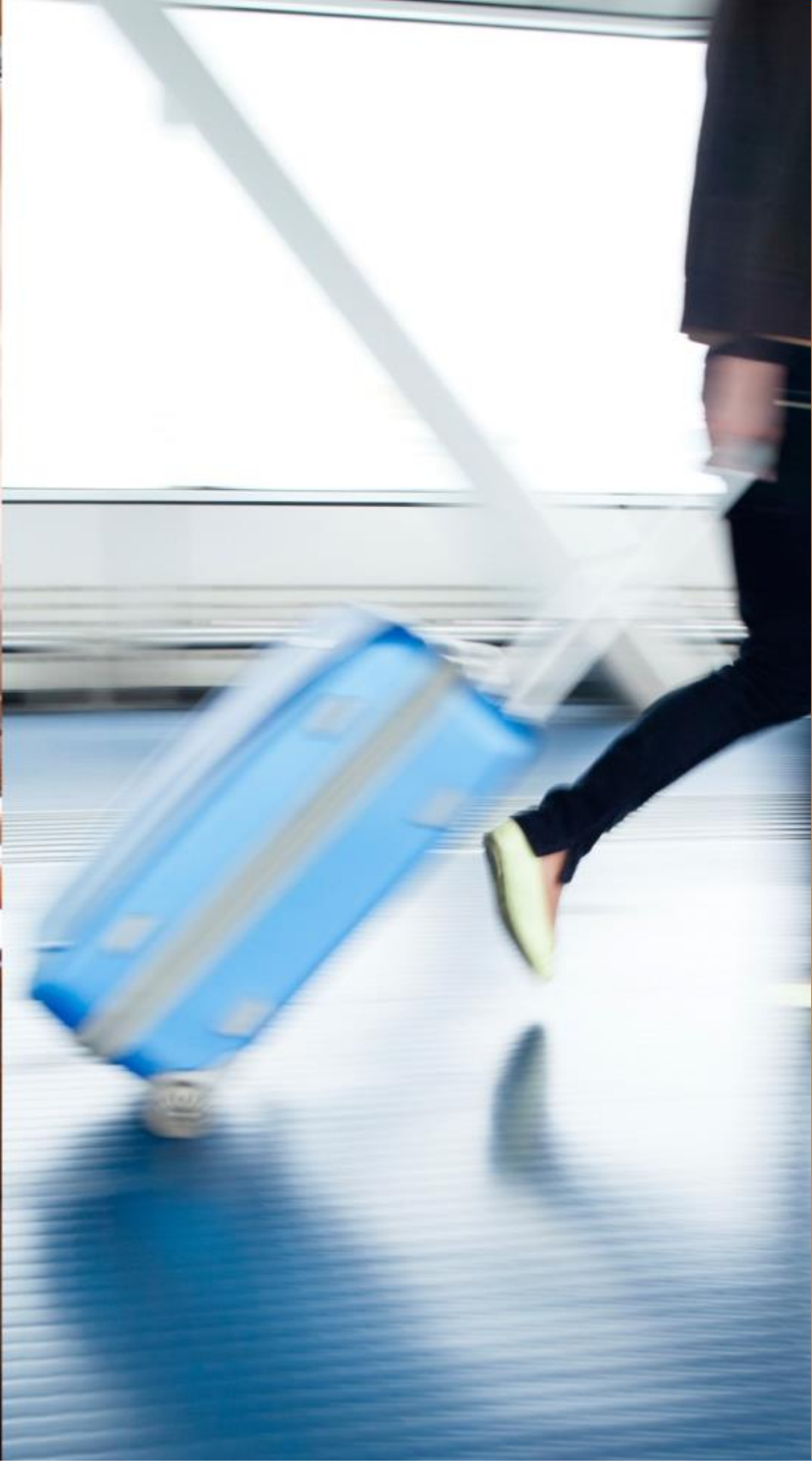
SIGNIFICANT ECONOMIC IMPACT

$1.5B+ investment by a private company will create more than…

45,000 new jobs from construction of system and stations

8,000 new jobs for the rail and station operations

*Miami Economic Associates and Real Estate Research Consultants, Inc.



ALL ABOARD FLORIDA WILL…

Revitalize the economy and create thousands of jobs

Remove up to three million cars from Florida's roads annually and offer a convenient transportation alternative

Create tens of thousands of jobs

Ignite the entrepreneurial spirit through a privately funded, operated and maintained business model

ALL ABOARD FLORIDA

www.allaboardflorida.com

ALL ABOARD FLORIDA

AMERICA'S ONLY PRIVATELY OWNED, OPERATED AND MAINTAINED INTERCITY PASSENGER RAIL SYSTEM

All Aboard Florida will connect Florida's key cities in a new way to spark social and economic opportunities.

The project is being developed by All Aboard Florida - Operations LLC, a company that traces its roots to Henry Flagler. More than a century ago, Flagler transformed Florida when he developed his railroad and catalyzed the development of major cities along the east coast.

It's time for another transformative change.

This exciting transportation project will give Florida residents and visitors a new and reliable transportation option to connect Central and South Florida, two of the state's most visited and populated regions.

Stations are planned in the downtowns of Miami, Fort Lauderdale and West Palm Beach, and at the new intermodal facility at Orlando International Airport.

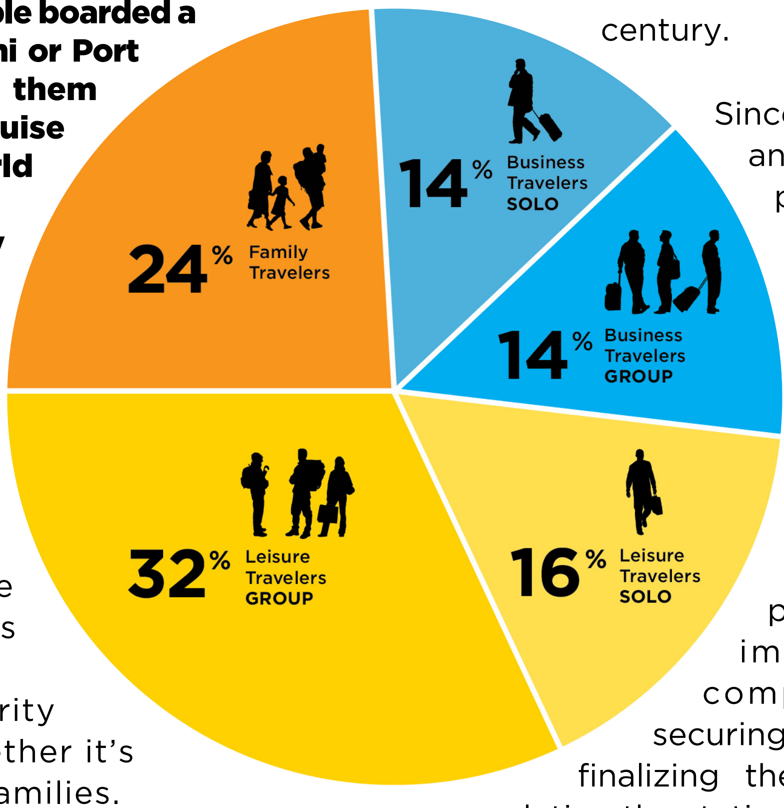
These stations will become destinations and revitalize the surrounding areas. By planning connections to existing and future transportation systems and offering additional mobility options -- such as rental cars and local transit -- passengers will be able to access the central business districts, area landmarks and attractions with ease.

All Aboard Florida will connect travelers to what matters.

From beautiful beaches to thrilling theme parks to enticing shopping destinations, South and Central Florida have it all. In 2012,

- **More than 55 million people visited Central Florida and Miami International Airport served more than 39 million passengers**
- **Almost 8 million people boarded a cruise from PortMiami or Port Everglades, making them the two largest cruise ship ports in the world**
- **The Orange County Convention Center hosted 250 events that were attended by more than 1.4 million people**

All Aboard Florida will serve the needs of all passengers. The addressable market is more than 50 million customers. The majority travel in groups, whether it's leisure, business or families. Almost 30 percent of the market is business travelers.



The service will use clean-diesel trains and leverage existing transportation corridors, which will benefit the environment and protect Florida's natural resources.

Protecting Florida's natural habitat is vital. In addition to removing millions of cars from the roads each year, the system will operate within a rail corridor that has existed for more than a century.

Since the project was announced in 2012, the project team has moved at an accelerated pace to deliver this new passenger rail system. An investment grade ridership study and a peer review were finalized, and the company hired key executives to deliver the project. 2013 is an important year for the company as it focuses on securing environmental permits, finalizing the route alignment and completing the station design process.

SERVICE OFFERINGS WILL INCLUDE

- **Hourly scheduled service**
- **Premium amenities, including Wi-Fi and food & beverage service**
- **3 Hour travel time between Miami and Orlando**

All Aboard Florida will:

- **Create tens of thousands of jobs, from rail construction to operations to transit-oriented development opportunities**
- **Revitalize local economies**
- **Provide economic development along the route, resulting in a new revenue for Florida's cities and counties**
- **Increase tourism opportunities**

Find out more at www.AllAboardFlorida.com or email us at info@allaboardflorida.com.
Follow us on Facebook and Twitter.

All Aboard Florida – Operations LLC (AAF) is a wholly-owned subsidiary of Florida East Coast Industries, Inc.

Economic Development Incentives Portal

Cissy Proctor, Director, Division of Strategic Business Development
Senate Commerce and Tourism Committee
October 7, 2013

Florida Policy Direction

Section 288.076, Florida Statutes, provides for an online data base, which reports on economic development programs that will promote transparency by providing the public a real-time program and project information as well as projected economic benefits.

Portal Components

The portal must include the following information pertaining to each non-confidential project:

- Participant business information
- Project information
- Project performance goals
- Project evaluation criteria
- Total state investment to date
- Projected economic benefits
- Project contracts/agreements

Additional Information on Portal

- Description of the methodology used by the Office of Economic and Demographic Research to calculate the economic benefits of a project
- Report of findings and recommendations on the causes of any qualified target business not completing its tax refund agreement
- Information relating to the progress of Quick Action Closing Fund projects, including the average number of days between the date the department receives a completed application and the date on which the application is approved
- Guide to understanding the portal

How Portal will be Updated

- Real Time
- Project information will be published within 48 hours of the confidentiality period expiring
- Economic benefits will be published within 48 hours of the conclusion of each agreement
- Redacted contract or agreement will be published within 48 hours of the confidentiality period expiring
- Any changes of the published information will be updated with a time stamp

FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Economic Development Incentives Portal

Launched on October 1, 2013, the new **Economic Development Incentives Portal** (Portal) is improved to allow more interactive capabilities as DEO furthers its commitment to efficiency, accountability, and transparency. The Portal provides unprecedented access to the performance measurements required in economic development incentive contracts and each company's progress toward reaching their required job creation goals. This site contains details on every non-confidential Florida economic development incentive project with an executed contract.

A core principle of the state's economic development incentive program is that businesses are paid based on verified performance, meaning no tax dollars are paid until job creation or capital investment numbers are audited and confirmed. Incentive agreements have sanction and clawback provisions to help protect the state's investment. While performance requirements are typically phased and met over multiple years, performance is measured and confirmed annually. Projects will be updated as their performance data are confirmed, as well as new non-confidential projects after their confidential period ends.

The Economic Development Incentives Portal is a collaborative effort between DEO and its economic development partner, Enterprise Florida, Inc (EFI). A public-private partnership, Enterprise Florida identifies companies for job creation in targeted growth industries in which incentives can be vital to securing the business recruitment or expansion opportunity.

ABOUT INCENTIVES

Florida competes globally to bring jobs to the state from companies that have other location options. Economic development incentives are components of a toolkit designed to address various business needs in a competitive environment. A competitive economic development project is one in which a business has identified multiple locations that can meet its needs. Incentives may be used to reduce costs associated with a site, facility, or equipment and can help facilitate the location of businesses in Florida. They are designed to promote job creation, job retention, and capital investment in Florida. For a more comprehensive and historical look at the success incentives have played in helping Florida families, please read the 2012 Annual Incentives Report.

View Types of Incentives Awards for more specific information on each incentive type.

WHAT'S INCLUDED IN THE PORTAL

The interactive portal includes every non-confidential incentive project with an executed contract since 2000 that received or is on schedule to receive payments from the state of Florida. All available non-confidential, executed agreements will be redacted and uploaded to the Comprehensive View on the Portal over the next three months. As of October 1, 2013, the executed, non-confidential contracts since January 2013 have been redacted and uploaded to the Portal. Due to limited information, projects executed prior to 2000 are summarized in a high level report that features jobs, payments, and county location. Projects that are confidential or approved but do not yet have an executed agreement and projects that have withdrawn or decided not to proceed with the incentive are not included. Confidential projects, as defined by Florida Statutes, will be included once their exemption from the state's public record requirements has expired. Projects whose confidentiality expires will be added to the portal on a periodic basis. Incentives relating to the Office of Film and Entertainment, Workforce Florida, Space Florida, and the Division of Community Development are not included in the portal.

View Guide to Understanding the Economic Development Incentives Portal for descriptions of keywords, fields, headers, and project status.

Quick Action Closing Fund (§288.1088 F.S.)

The Legislature finds that attracting, retaining, and providing favorable conditions for the growth of certain high-impact business facilities, privately developed critical rural infrastructure, or key facilities in economically distressed urban or rural communities which provide widespread economic benefits to the public through high-quality employment opportunities.

Pursuant to §288.1088 F.S., DEO has up to seven business days after evaluating a project to recommend to the Governor approval or disapproval of a project for receipt of funds from the Quick Action Closing Fund. For Fiscal Year 2012-2013, there were 24 QACF applications approved in FY 2012-2013, **an average of 6.7 days** from the date of receiving the completed application, to approve and submit recommendations to the Governor.

Office of Economic and Demographic Research's Return on Investment Model

For information regarding the methodology used in calculating the projected economic benefit, see the following links:

- EDR Legacy Model Methodology
- EDR Legacy Model Assumptions
- EDR Legacy Model Calculations

Tax Refund Findings and Recommendations

Beginning with all tax refund agreements executed after July 1, 2010, DEO started to make the conscious effort to ascertain the causes for any qualified target businesses not completing its agreement. Annually, DEO will publish the findings and recommendations in this section as well as include the findings in annual incentives report under s. 288.907.

- 2012 QTI Annual Report

THE PORTAL

- Legacy Project Overview Report *(Approved prior July 1, 2000)*
- Search the Portal

FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Economic Development Portal

Program:

Manufacturing and Spaceport Investment Incentive (§288.1083, F.S.)
QTI-Brownfield Bonus (§288.106, F.S.)
Qualified Defense and Space Contractor Tax Refund (§288.1045, F.S.)
Qualified Target Industry Tax Refund (§288.106, F.S.)
Quick Action Closing Fund (§288.1088, F.S.)

Please select the fields that you would like included in your report.

- [ ] Target Industry
- [ ] High Impact Performance Incentive (HIPI)
- [ ] Business Location
- [ ] Business Firm Size
- [ ] Small Business
- [ ] Headquarters (If Applicable)
- [ ] Confirmed Amount Paid (To Date)

Start Date:

End Date:

Submit

Business:

All Businesses
1Brick, LLC
21st Century Oncology Management Services, Inc.
2G CENERGY Power Systems Technologies Inc.
AAA Auto Club South, Inc.

County:

All Counties
Alachua
Baker

Status:

Active
Complete

FLORIDA DEPARTMENT of ECONOMIC OPPORTUNITY

Economic Development Portal

SEARCH THE PORTAL

Project Name	Business Name	County of Project	Status
PricewaterhouseCoopers LLP-Knowledge Service Org 06-00038	PricewaterhouseCoopers LLP-Knowledge Service Org	Hillsborough	Complete
Raven Transport Holding 03-00126	Raven Transport Holding	Duval	Complete
Rex Lumber Company, LLC 02-00027	Rex Lumber Company, LLC	Jackson	Complete
Ruth's Chris Steak House, Inc. 06-00061	Ruth's Chris Steak House, Inc.	Seminole	Complete
Source Interlink Companies, Inc. 01-00189	Source Interlink Companies, Inc.	Lee	Complete
Tandel Systems, Inc. 05-00163	Tandel Systems, Inc.	Pinellas	Complete
Telemundo Communications Group, LLC 03-00184	Telemundo Communications Group, LLC	Miami-Dade	Complete
The Bank of New York 01-00147	The Bank of New York	Seminole	Complete
The Newport Group, Inc. 06-00233	The Newport Group, Inc.	Seminole	Complete
Timco Aviation Services, Inc. 03-00323	Timco Aviation Services, Inc.	Columbia	Complete
TradeStation Group, Inc. 02-00067	TradeStation Group, Inc.	Broward	Complete
Trend Offset Printing 00-01577	Trend Offset Printing	Duval	Complete
United States Specialty Sports Association 03-00208	United States Specialty Sports Association	Osceola	Complete
University Clinical Research - Deland, LLC 03-00337	University Clinical Research - Deland, LLC	Volusia	Complete
VaxDesign Corporation 04-00219	VaxDesign Corporation	Orange	Complete
Vertex Tax Technology Enterprises LLC 03-00029	Vertex Tax Technology Enterprises LLC	Sarasota	Complete
Volvo Parts North America, LLC 05-00223	Volvo Parts North America, LLC	Duval	Complete
Wal-Mart Stores East - DeSoto Grocery Distribution 01-00130	Wal-Mart Stores East - DeSoto Grocery Distribution	DeSoto	Complete
WhiteWave Foods Company 03-00115	WhiteWave Foods Company	Duval	Complete
World Duty Free Americas 03-00239	World Duty Free Americas	Broward	Complete

< Page 2 of 2

Economic Development Portal

SEARCH THE PORTAL

Project Summary

Project Name:	TradeStation Group, Inc. 02-00067	**Projected Economic Benefit (ROI):**	12.95
Business Name:	TradeStation Group, Inc.	**Total Confirmed Economic Benefit (ROI, As Applicable):**	
Project Status:	Complete	**Maximum Potential State Investment:**	$400000.00
Headquarters Location (If Applicable):		**Total Confirmed Amount Paid (To Date):**	$400000.00
Business Size:		**Total Jobs Retained (If Required):**	
Small Business:		**Total New Jobs Committed:**	100
County of Project:	Broward	**Total Cumulative Net New Jobs Confirmed (To date):**	226
Target Industry:	Corporate, Subsidiary, and Regional Managing Offices	**Total Capital Investment Required (If Applicable):**	$
HIPI Project:		**Total Capital Investment Confirmed (To Date, and If Required):**	$0.00
Last Modification Date:	Fri Oct 04 14:09:57 GMT 2013		

Cumulative Net New Jobs By Year

Performance Year	Cumulative Net New Jobs Confirmed
2004	70
2005	82
2006	172
2007	172
2008	190
2009	226

Documents
Redacted_exe_TradeStation.pdf

Comments:

Incentive Awards

Program:	Qualified Target Industry Tax Refund (§288.106, F.S.)	**Award Duration:**	8.92 Years
Incentive Status:	Complete	**Award End Date:**	01/23/2011
Date of Award:	02/23/2002	**Total Local Financial Support Commitment (If Required):**	$80000.00
Maximum Potential Award Approved (If Required, Includes LFS):	$400000.00	**Anticipated Last Performance Date for Payment:**	
		Cumulative Confirmed Amount Paid (To date):	$400000.00

Cumulative Confirmed Amount Paid by Year

Payment Year	Confirmed Amount Paid by Year
2005-2006	$60000.00
2006-2007	$80000.00
2007-2008	$100000.00
2008-2009	$100000.00
2009-2010	$40000.00
2010-2011	$20000.00

Findings from Stakeholder Interviews

Thinkspot conducted five one-hour interviews with industry stakeholders selected by Film Florida leadership. In preparation of the interviews, Thinkspot submitted to Film Florida several open ended points of discussion to gather insight from the selected industry experts. Questions covered topics regarding industry measures of success, the role of state support, priorities to be addressed by Film Florida and its membership, and the financial incentive program.

Answers varied greatly between each interviewee, demonstrating a need for alignment moving forward. Concise summaries of the responses are below:

Question: What would you identify as the ultimate outcomes to be realized for the State of Florida in return for its investments in the film and entertainment industry?

This question sought to determine the stakeholders' impression of the ultimate goal of industry growth and its success. Overarching responses to this question included:

- Jobs
- Repeat business/productions occurring in the State.
- A sustainable industry that fosters innovation.
- Collaborative relationships with educational institutions
- An industry with a long term vision.
- Measuring success means this industry must be able to be compared with other industries.

Each interviewee found sustainable job creation and industry growth of paramount importance in measuring the industry's success. Educational partnerships were also addressed by each interviewee as an important outcome of industry growth in Florida.

Special attention was paid to develop a measurement of success that would be acceptable to both industry and government stakeholders. It was expressed that measuring this industry against other industries is difficult, as is measuring the Film and Entertainment Financial Incentive against other incentive programs. Anecdotal evidence has shown that policymakers and government leaders continue to seek a "common yardstick" against which this industry and its programs can be measured. Interviewees recognize the importance of this measure and the need for consensus surrounding it.

In suggesting appropriate measures, interviewees express including factors other than job growth and industry spending when developing the measure. Film induced tourism, educational partnerships, revitalization of communities, exposure of Florida landscape, and industry infrastructure were all addressed as points that should be included when developing the appropriate measures.

Question: If you could start from a completely clean slate, how would you organize the Department of Economic Opportunity Office of Film and Entertainment (OFE), both in its relationship to the state and to the industry?

This question gave the interviewees the opportunity to what government stakeholders could do, or stop doing, to best support the industry. Several consistent points were addressed by interviewees, including:

- OFE needs to be part of a larger systemic change.
- OFE excels at administration while Film Florida is best for marketing. Focus the funding where it works.
- Elevate status of film commissioner of one who influences policy.
- Reorganize Film Florida as public private partner like other economic development partners.

Each interviewee spoke to the supportive nature of both the OFE and Film Florida, indicating that the organizations may be limited by their structure. Driving resources to where they are most effective was supported by the interviewees, recognizing that Film Florida is heavily engaged in marketing efforts, while the OFE is appropriated resources (albeit limited) to perform the same function. Likewise, much of the OFE is engaged in incentive administration, which is also performed by other pieces of the Department of Economic Opportunity. It was expressed that additional opportunities such as these could be explored to find efficiencies.

Several interviewees expressed the placement of the OFE as a potential obstacle to their operations. When the OFE moved from the Executive Office of the Governor to the Department of Economic Opportunity, its stature and decision making ability was inhibited. Reorganization of the state's industry support into a public-private partnership (i.e. VISIT FLORIDA or Enterprise Florida) would be beneficial.

The Film and Entertainment Industry Financial Incentive was also addressed by several interviewees while discussing this question. The recommendation was made that the program should be simplified, making it easier to navigate for productions, and making administration easier. Additionally, several interviewees addressed the allocations of resources, or queues, in the program, indicating that visioning or planning could best determine where resources should be devoted. While evaluative decisions on projects has been suggested as a potential feature of the program, interviewees indicated that such criteria would be difficult to determine and would only serve to limit the beneficial impacts of the program.

It was recommended that long term planning could determine the appropriate structure and activities for both the OFE and Film Florida that would better support the industry.

Question: The five-year strategic plan calls for alignment of the various film and entertainment stakeholders. What progress has been made to date and what are the challenges preventing ideal alignment?

Here, the interviewees spoke to their own impressions on how the different facets of the industry work together, both in their operations and in their advocacy efforts. This was seen as a clear goal of the interviewees, as responses indicate below.

- Alignment is the greatest obstacle to industry's success
- Industry factions compete for their survival, not for their future.
- Lack of collaboration has led to lack of support for the industry and the incentive.
- Alignment won't occur until we have a real long term vision or strategy.
- Increase funding will provide the collaboration we need.

Strong leadership was discussed as a necessary component of alignment, further evincing the need to appropriately position the Film Commissioner. Several discussions included the recognition that the lack of alignment leads to lower funding for the OFE and the lack of commitment to funding incentive programs.

One interviewee recommended additional funding to fuel ideal alignment and collaboration. At least one suggestion was made to give each industry group their own program. Again, long term planning was recommended to define the roles of each industry sector.

Question: How would that ideal alignment impact the industry?

Combined with the responses from the previous question, it is clear that the responses show alignment as a necessary goal for the industry. When expressing what that outcome would be, interviewees discussed:

- Clear goals and direction for the industry.
- Clearer requests for support.
- More jobs and industry efficiencies.

A collective long-term vision for the industry was discussed as the product of ideal alignment. This would ensure that all stakeholders play a role in determining their contribution to the growth of the industry. The result would be clearer and collective advocacy positions.

Question: What are the three priority strategies from the five-year plan that should take center stage over the next 12-18 months?

This question sought the initial plan for alignment in the short term. The need for alignment and collaboration was again expressed as a top priority. Overarching responses included:

- Alignment
  - Define roles of OFE and Film Florida
  - Long term vision that includes each piece of the industry.
- Incentive
  - Funding
  - Refinement
  - Commitment
- Telling the industry's story
  - Successes
  - Where we make a difference
  - How we contribute to Florida's Economy
- Educational partnerships
  - Developing curriculum that will attract productions
  - A place for trained workers to use their skills

In addition to disparate interests from industry factions, the need to involve regional interests was discussed. With alignment as a common goal, long term planning was expressed as the answer to determining the industry's future.

Wavering commitment is seen as having an impact on production in Florida. Several interviewees expressed the need to gain state support for the industry in the short term. Continued incentive funding is a priority goal, even if modifications to the program are necessary. Recognizing that modifications are being explored by legislative and executive branch staff, some recommendations include including total project spend as evaluative criteria along with soft factors such as tourism, educational partnerships, and cluster development.

A lack of education on the industry's contribution to Florida's economy was identified as a perceived obstacle. A concerted message, touting industry benefits could serve to secure commitment to the state's support of the industry. Differentiating this industry's incentives from more controversial programs was discussed.

Critical to job growth and creating a sustainable industry, facilitating educational partnerships was identified as a main priority. One interviewee expressed the need to share how to best leverage educational partnerships. Additionally, collaboration with educational institutions would address some of the other expressed priorities.

Question: What factors are preventing Florida's film and entertainment industry's stakeholders from acknowledging the mounting evidence against the prospect of a net positive return on investment created by the current use of incentives?

This question assembled the arguments against studies and other opinions that financial incentives for the film and entertainment industries that show a negative return. Responses include:

- The data is not complete.

- Data is manipulated
- “They fall on deaf ears. I don’t believe them”
- Studies won’t take into account tertiary impacts on the industry.
- Studies focus on states that do not have an indigenous film industry.
- Return of tax revenue is not the right measure. GSP is the right model.

There was broad consensus among the interviewees that such opinions are unfounded and not based on appropriate data. Interviewees recognized that policymakers are seeking a mechanism to disprove these studies, but no consensus has been reached on what mechanism to utilize. Various suggestions were made including GSP, total project spend, exposure of Florida locations. Again, the need for industry alignment (and government buy-in) on an acceptable method of measurement requires visioning and planning by industry stakeholders.

Recommendations

The overwhelming priority from stakeholder interviews was the need for alignment. In order to fulfill its role in guiding the strategic direction of the industry, particularly its interaction with government stakeholders, the board’s lack of consensus must be addressed. The path to such alignment should be inclusive, with commitment from all industry sectors to participate. Thinkspot recommends a stakeholder-driven planning process—even if facilitated by a support team other than Thinkspot—to define the roles of state and Film Florida support, reform the incentive program in a manner responsive to policymakers, and develop an accepted mechanism that is a common yardstick for the incentive program.

THE FILM & ENTERTAINMENT INDUSTRY STRATEGIC PLAN FOR ECONOMIC DEVELOPMENT AT-A-GLANCE

Vision

- **Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, play, work and do business.**

Goals

- Lead the nation in global competitiveness as a location for business, investment, talent, innovation and visitors.
- Lead the nation in economic growth and prosperity.
- Lead the nation in quality of life.

Objectives

- Improve employment in Florida.
- Foster opportunities for prosperity.
- Grow businesses.
- Expand global commerce.
- Increase Florida's attractiveness to workers, residents and visitors.

Cross-Cutting Strategies					
1. **Strengthen collaboration and alignment among state, regional and local entities that would further the state's economic vision through support of the film and entertainment industry.**					
2. **Create, grow and sustain a statewide database viable for multi-media which showcases each region's strengths and opportunities in support of the film and entertainment industry.**					
Area-Specific Strategies					
Talent Supply & Education	**Innovation & Economic Development**	**Infrastructure & Growth Leadership**	**Business Climate & Competitiveness**	**Civic & Governance Systems**	**Quality of Life & Quality Places**
3. Employ innovations in education to lead to increased availability of skilled, permanent workforce and higher paying jobs. 4. Work to retain and attract top industry-skilled professionals to teach at Florida institutions. 5. Partner with high schools and higher education institutions to offer industry exposure and experience to students.	6. Create, grow, sustain and integrate efforts related to research & development, technology transfer, commercialization and the capital investment required to create, nurture and expand innovative media and entertainment businesses. 7. Support trade shows and industry events in their migration from out-of-state to Florida. 8. Brand and consistently market Florida as diverse, forward-thinking, and the best state for film, multi-media and entertainment.	9. Establish, grow and sustain an entertainment infrastructure bank to provide low- and no-interest loans for infrastructure development for the film, multi-media and entertainment industry. 10. Support Florida-based post-production studios (bricks and mortar) to attract and retain film and entertainment companies from concept through release.	11. Expand opportunities for access to private capital for film, TV and digital media. 12. Market available existing tools to assist small/minority businesses that support the film and entertainment industry.	13. Develop a collaborative, comprehensive and educational in-state marketing strategy which includes digital media to engender support from the public and elected officials.	14. Develop policies that encourage re-development of under-utilized areas and historic districts for creative industries. 15. Ensure Florida's environment and quality of life are sustained and enhanced by future growth plans and development decisions within the film and entertainment industry.

Office of Film and Entertainment

Fiscal Year 2011/2012
Film and Entertainment Industry
Financial Incentive
Performance Report

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Florida Office of Film and Entertainment
Division of Strategic Business Development
Department of Economic Opportunity

Florida's Entertainment Industry Financial Incentive Program

I. Overview

The Florida Office of Film and Entertainment (OFE), within the Department of Economic Opportunity (DEO), administers the six year Florida Entertainment Industry Financial Incentive Program provided for in section 288.1254, Florida Statutes. The program began on July 1, 2010 and sunsets June 30, 2016. The 2010 legislature allocated $242 million in tax credits initially with an additional $12 million allocated by the 2011 Legislature. Effective March 2012, the legislature allocated an additional $42 million in tax credits to the program, totaling $296 million.

Since the inception of the program on July 1, 2010, the OFE has submitted and processed 481 applications. The OFE has qualified and certified 230 of those productions for tax credits with projected Florida expenditures of approximately $1.3 billion. Wages to Floridians associated with the 230 productions are currently projected to be close to $760 million and are associated with 161,000 positions for Florida residents.

Rule 27M-5.003(3), F.A.C. requires the OFE to qualify projects on a first-come, first-served basis within its appropriate queue. Once a project is qualified, it is certified based on its anticipated Florida expenditures. Qualified expenditures include payments to Florida vendors for products and services as well as wages paid to Florida residents working directly on the production. Non-resident wages and purchases from companies without a physical presence in Florida do not qualify for the program.

The OFE awards tax credits to the pre-certified production company upon completion of the project. As a basis for the award, the OFE reviews an audit submitted by the production that has been performed by a Certified Public Accountant. The final tax credit award is calculated as a percentage (20-30 percent) of each pre-certified projects' final qualified Florida expenditures and cannot exceed $8 million in total tax credits per project.

The production types certified to date include: 58 motion pictures (theatrical, made for TV, direct to video, documentaries, visual effects sequences in conjunction with a motion picture); 42 digital media productions; and, 101 television productions (TV series, including high-impact, drama, comedy, game shows, variety, entertainment shows, reality), TV series pilots, telenovelas, and award shows; and 29 commercials. (Please see Exhibit I: 2010/2016 Entertainment Industry Financial Incentive Program Summary for additional details.)

II. FY 2011-2012 Annual Incentive Performance Summary

- 169 certified projects either completed production, provided the OFE with their CPA audit or were awarded tax credits in fiscal year 2011-2012; includes 25 projects awarded tax credits, 42 projects pending OFE audit review, and 102 projects that wrapped production in Florida with outstanding final reports.
- Projected outcomes for all projects (verified, pending and those with audits outstanding) are below. (Please refer to Exhibit II: Entertainment Industry Financial Incentive fiscal year 2011-2012 Annual Report for additional details):
  - 68,183 positions for Floridians
  - $309,286,980 in wages for Floridians
  - $553,707,406 in Florida qualified expenditures (Florida wages, products or services)
  - 73,861 lodging/hotel room nights
  - 14,036 production days

Statutory language effective July 1, 2011 requires the OFE to report job data as Full Time Equivalent (FTE). Due to the unique characteristics of the entertainment industry, individuals working on productions are not counted in FTE format. In most instances, hourly employment data for individual employees is not assembled by the production, and therefore is not available for reporting to the OFE. The OFE continues to explore best practices in determining a method by which to report this information.

III. The Economic Impact of the Film and Entertainment Industry in Florida

A. "Dolphin Tale"

The feature film "Dolphin Tale," which filmed in Clearwater, is an excellent example of how productions sustain other Florida industries such as tourism, entertainment, attractions, and hospitality. Local hotels generated $736,355 associated with the 5,875 room nights used for cast and crew (per financial incentive audit data). According to the Clearwater Marine Aquarium, since the movie premiered in theaters September 23, 2011, daily visitors have quadrupled, justifying the construction of a second visitor's center. This is an example of "film-induced tourism" which is defined as "a tourist visit(ing) a destination or an attraction as a result of the destination being featured on television, video, DVD, or the cinema screen."[1] Film-induced tourism elements such as authenticity, location and social setting are present in "Dolphin Tale," making the movie an important determinant of growing tourism in the local area, with the subsequent economic impact in the regional economy.[2] Using spending per visitor from the Clearwater-St. Petersburg tourism statistics, and RIMS II economic multipliers to estimate the total economic impact of movie-induced tourism in the local economy, a study conducted by the University of South Florida, Saint Petersburg College of Business in 2012 found that "Dolphin Tale" is the driver of approximately 72.7% of visitors to the Clearwater Marine Aquarium.[3] The model forecasts approximately 800,000 visitors in 2013, growing to 2.3 million in 2016.[4] These visitors will provide a total economic impact to the local economy of approximately $400 million in 2013, which increases to $2.3 billion in 2016.[5]

According to an August 17, 2012 article in the Tampa Bay Times:

> "Kosove, the *Dolphin Tale* producer who is co-CEO of Alcon Entertainment, said the $42 million movie would never have been made without $5 million in tax breaks from Florida."
>
> He also said the "$60 million marketing campaign for the 2011 movie helped counteract bad publicity that Florida's Gulf Coast unfairly received from the 2010 Deepwater Horizon oil spill in the Gulf of Mexico."
>
> The Clearwater community also likely got a boost from a message that appears at the end of the movie, which reads: *"Winter is happy and healthy and lives at the Clearwater Marine Aquarium in Clearwater, Florida. You can visit her there or online at seewinter.com"* [6]

B. Florida Entertainment Industry Wide Employment Data

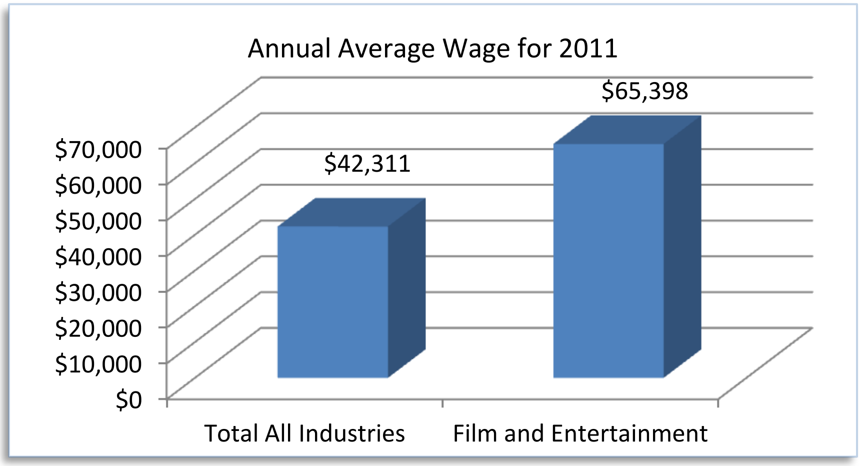
The Department of Economic Opportunity Office of Labor Market Statistics provided the following 2011 employment data to the OFE:

Florida Film and Entertainment Industry
Number of Establishments, Average Annual Employment, and Annual Average Wages
2011
Ranked by Employment

Industry Title	Number of Establishments	Average Annual Employment	Average Annual Wage*	Percent of Total Film Establishments	Percent of Total Film Employment
Total, Film and Entertainment Industry	4,240	21,454	$65,398		
Television broadcasting	192	7,663	$72,656	4.5%	35.7%
Motion picture and video production	958	3,584	$62,078	22.6%	16.7%
Independent artists, writers, and performers	1,507	2,482	$54,343	35.5%	11.6%
Musical groups and artists	423	2,019	$47,705	10.0%	9.4%
Cable and other subscription programming	90	2,011	$83,517	2.1%	9.4%
Agents and managers for public figures	309	1,271	$64,779	7.3%	5.9%
Satellite telecommunications	100	589	$86,536	2.4%	2.7%
Commercial photography	228	432	$35,709	5.4%	2.0%
Teleproduction and postproduction services	118	379	$54,859	2.8%	1.8%
Sound recording studios	92	372	$45,009	2.2%	1.7%
Motion picture and video distribution	47	266	$67,856	1.1%	1.2%
Other sound recording industries	91	241	$49,835	2.1%	1.1%
Record production	43	78	$75,121	1.0%	0.4%
Other motion picture and video industries	42	70	$37,509	1.0%	0.3%

*Note: The annual wage for all industries in Florida is $42,311 for 2011

- In 2011, there were 4,240 establishments in the film and entertainment industry with employment of 21,454 and an annual average wage of $65,398
- In 2011, the average annual wage for workers in the film and entertainment industry was $65,398 exceeding the state's 2011 annual average wage for all industries of $42,311 by 54.6 percent.
- No major employment sector in Florida has a higher annual average wage than the film and entertainment industry.



Source: Florida Department of Economic Opportunity, Labor Market Statistics Center.

Film and Entertainment Industry Wages Compared To Other Industries

Florida, 2011

Industry	Average Annual Wages
Total, All Industries	$42,311
Film and Entertainment	$65,398
Information	$64,542
Financial Activities	$59,482
Manufacturing	$52,373
Professional and Business Services	$50,822
Government	$47,823
Education and Health Services	$44,454
Construction	$40,873
Trade, Transportation, and Utilities	$37,751
Other Services	$29,807
Natural Resources and Mining	$25,151
Leisure and Hospitality	$21,824

Source: Florida Department of Economic Opportunity, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program. Released June 2012.

1

C. Advertising and Marketing Value

The following data shows the results of research conducted by the Greater Miami Convention & Visitors Bureau (GMCVB) on the impressions and media value (i.e., television advertising) of different television series featuring Miami to demonstrate what it would cost if the GMCVB were to advertise Miami as a tourist destination during these television shows. Using the top three in terms of valuation dollars as examples, to advertise during one episode of "CSI Miami" it would cost $1,921,106; to advertise during one episode of "Despierta America" it would cost $255,656 and to advertise during one episode of "Burn Notice" it would cost $1,325,925.

TV Series Featuring Miami

CY 2011 and EST. 2012 YTD Impressions and Media Value Jan. 1 – June 30, 2012

Program	Network	Length (min)	2011-2012 Episodes	Total Imps (Cume)		Total Valuation	
The Glades	A&E	60	39		104,114,400		$ 19,084,170
Charlie's Angels	ABC	60	4		27,600,000		$ 9,998,100
Animal Cops: Miami	Animal Planet	60	26		13,930,000		$ 1,717,891
Real Housewives of Miami	Bravo	60	14		22,890,000		$ 4,236,939
CSI Miami	CBS	60	36		504,000,000		$ 162,729,000
Catalina Hotel	CW	60	2		7,280,000		$ 1,096,760
Austin & Ally	Disney Channel	60	21		18,040,500		$ 2,688,509.
Dexter	HBO	60	12		42,000,000		$ 5,974,500.
Magic City	Starz	60	14		10,010,000		$ 1,508,045.
Descontrol	Telemundo	60	66		32,832,000		$ 8,256,672
South Beach Tow	TruTV	30	21		10,675,000		$ 790,738
Quien Tiene La Razon	Telefutura	60	390		198,575,000		$ 49,852,88
Despierta America	Univision	240	390		397,150,000		$ 99,705,775
Burn Notice	USA	60	20		149,400,000		$ 26,518,500
Basketball Wives	VH1	60	28		30,600,000		$ 10,757,880
				Total:	1,569,096,900	Total:	$ 404,916,367

Valuation Criteria

- *Impressions represent Jan. 2011 – June 2012 as reported by networks/Neilsen*
- *Show values based on Network Cable CPM's ranging $17.00 - $25.50 (based on show reach/appeal/demand): Network Broadcast CPM of $45.00*
- *Total value of 60-minute show based on 4x value of :60-second spot (1x/quarter hour programming segment)*

D. Positive Impact on Local Communities

When productions film in a given location, they have a direct impact on the communities that support them, not just in terms of jobs and direct spending with Florida businesses, but also in terms of other unique economic benefits to local communities where production occurs.

- "Burn Notice"

This television series, which is seen in countries all over the world, is filmed in the Coconut Grove Convention Center – a building in Miami which was once scheduled to be demolished. Once "Burn Notice" concludes its use of the Convention Center, rent proceeds will be used to revitalize the area. The show, now in its 6th season, currently infuses the local economy with close to $1.5 million each time it films an episode and maintains 85% of its cast and crew as local wage earners (per financial incentive audit data).

- "The Glades"

The producers of "The Glades" converted an industrial warehouse space at Pembroke Park into a studio for the hit television series. The show films a majority of its scenes outdoors, capitalizing on the authentic Florida landscape. A&E just announced the series was picked up for a fourth season, and they will start filming in Florida in early 2013.

- "Magic City"

This series leases the former Bertram Yacht facility and has converted it into sound stages and production offices. The producers spent $8 million in four months to convert a vacant facility into the fictional Miramar Playa Hotel where the majority of "Magic City" is shot. The second season of the show is currently filming in Miami.

E. Notable Recent Florida Productions:

Motion Pictures**:**

- **"**Dolphin Tale" Starring Morgan Freeman, Ashley Judd, Kris Kristofferson, and Harry Connick Jr. (Placed 3rd highest box office gross on opening weekend; 1st on second weekend; $73 million box office to date; $24 million in DVD sales.)
- **"**Rock of Ages**"** Starring Tom Cruise, Alec Baldwin, Paul Giamatti, and Catherine Zeta-Jones
- "Magic Mike" Starring Matthew McConaughey, Channing Tatum and Alex Pettyfer. (Total box office to date $114 million**)**
- **"**Step Up Revolution**"** Starring Alyson Stoner, Adam G. Sevani and Stephen Boss - the next installment in the worldwide smash "Step Up" franchise.
- **"**Springbreakers" Starring James Franco, Selena Gomez and Vanessa Hudgens. (Premiered recently at the Toronto Film Festival. Wide theatrical release date 2013)
- **"**Parker**"** Starring Jason Statham, Jennifer Lopez, and Nick Nolte. (In theaters October 2012)
- **"**Pain and Gain" Starring Mark Wahlberg, Dwayne Johnson and Ed Harris. (Release date 2013)

Television:

- "Burn Notice" (USA) Starring Jeffrey Donovan, Gabrielle Anwar, and Bruce Campbell
- "The Glades" (A&E) Starring Matt Passmore, Kiele Sanchez, and Carlos Gomez (The series premiere was the most watched original drama in A&E history)
- "Magic City" (STARZ) Starring Jeffery Dean Morgan, Danny Huston, Kelly Lynch and Olga Kurylenko
- "Caso Cerrado" (Telemundo Studios) Emmy-nominated, court show. Ranked #1 Spanish language program at 4pm across key demographics.
- "Grachi" (MTV Networks Latin America) Children's show on Nickelodeon Latin America
- "La Casa de al Lado" (Telemundo Studios) The premiere was one of the top five telenovela premieres for Telemundo and averages over 2 million viewers per episode.
- "Billboard Latin Music Awards 2012" (Telemundo Studios)

Digital Media & Games:

- "Madden NFL 2013"
- "NCAA Football 2013"
- "Tiger Woods PGA Tour 2013"
- "Super Suite Algebra"
- "Super Suite Chemistry"
- "Augmented Reality Simulation for Medical Students"

Commercials:

- Gatorade
- Volkswagen
- Diet Pepsi
- Toyota
- Acura
- Office Depot
- Citibank

IV. Education and Workforce Development.

Critical to growing and sustaining any industry is a skilled workforce and healthy talent supply chain. Florida is fortunate to be home to many highly experienced industry professionals who work all over the globe. With an eye to the future

workforce, Florida also has many excellent film, television and digital media educational programs and institutions – public and private, post-secondary and secondary. Examples include:

- Florida State University College of Motion Picture Arts - ranked #17 [7] in the Hollywood Reporter's Top 25 Film Schools in the World list.

- Ringling College of Art and Design – ranked #23[8] in the Hollywood Reporter (see preceding).

- University of Central Florida's Interactive Entertainment Academy - ranked #2[9] in the Princeton Review's Top 10 Graduate Schools for Video Game Design Study (2011).

- Full Sail University – touted as having one of the five Best Music Programs in the country according to Rolling Stone Magazine; also ranked as the #3 New Media School in the World alongside MIT and NYU by Shift Magazine.

- The G-Star School of the Arts - the only high school in the world with a commercial motion picture studio on its campus, the G-Star Studios, now the largest motion picture studio in the State. Over 50 feature films have been produced at the Studios, plus many commercials including NIKE and Abercrombie & Fitch, as well as music videos and rehearsals by Celine Dion, Rod Stewart, Stevie Nicks and Radiohead.

V. Types of Productions and Strategic Opportunities

All types of productions are important to growing and retaining Florida's entertainment industry workforce and infrastructure: Commercials; features – both large and small budget, theatrical or direct to DVD; television series including high impact and smaller budget series; video games – entertainment or educational; visual effects sequences and more. The diversity of production in the state collectively supports the overall entertainment industry infrastructure.

Certain productions offer specific strategic value. Key to the long-term sustainability of the industry is production that maintains a long production cycle like high-impact television series and video game franchises. These types of productions not only sustain a talented workforce, they also sustain the vendor supply chain.

With regard to location-based production, high-impact TV series, which can be in production for six to10 months per season, arguably provide increased stability and thus sustainability. According to the Entertainment Industry Financial Incentive statute, "high-impact television series means a production created to run multiple production seasons and having an estimated order of at least seven episodes per season and qualified expenditures of at least $625,000 per episode." These projects employ the workforce for a longer period of time, spend money in local communities for a longer period of time across many businesses including small businesses, and generally require more "permanent" facilities. Returning seasons means more continuous work, which in turn, provides more infrastructure sustainability. (Example: Burn Notice just completed season six, The Glades, just completed season three.)

Additional opportunities lie with other long-cycle digital media projects such as video games, animated features, and visual effects sequences. These types of productions are typically created in "bricks and mortar" facilities in the state and provide long-term stable employment. Examples of well-known digital media production facilities in Florida include Electronic Arts Tiburon studios in Maitland, and n-Space in Orlando.

VI. The Film and Entertainment Industry in Florida

The State of Florida has a long history in the motion picture industry thanks to its year-round sunshine, moderate climate and spectacular scenery. Overall, the Film and Entertainment Industry is important to the Florida economy as a major driver of employment, attracting revenue from other states and countries. According to the Association of Film Commissioners International (AFCI), when a high budget feature film shoots on location, it can inject as much as $260,000 per day into that location's economy. A high budget weekly TV series will spend as much as $300,000 per day on location. (See AFCI's Production Revenue Tracking Guidelines - Exhibit IV.)

Telemundo, with studios based in Miami, is the fastest growing Spanish-language broadcast network for the third consecutive month among the coveted adults 18-49 demographic as of August 2012.[10] Telemundo delivered its best August on record among total viewers – up 16 percent year-over-year, (TVByTheNumbers).[11] Additionally, Telemundo registered double digit growth over the third quarter of 2010, according to Nielsen Media Research. The Telemundo Network now reaches 94 percent of U.S. Hispanic viewers and has over 1000 cable affiliates.[12]

Florida is also home to Univision, the number one Spanish-language television network in the world. Headquartered in New York City, Univision has its major studios, production facilities, and operations in Doral, Florida.

In addition to Florida's history with traditional types of entertainment productions, the state has a growing share of the interactive digital media entertainment industry sector. Digital media entertainment products meld together entertainment software development and publishing to provide Florida a further strategic opportunity for diversifying the economy via the entertainment industry sector. As an added bonus, the skill sets associated with this segment of the industry cross-walks to the modeling and simulation industry sectors, also important growth sectors for Florida's economy.

Florida is home to dozens of digital media developers and publishers including Electronic Arts (EA) Tiburon, 360ed, n-SPACE and Firebrand Games. With Madden NFL, NCAA Football, Tiger Woods PGA TOUR™ and other titles, Tiburon is one of the top developers in the world. Employing several hundred, Tiburon is the second largest studio among Electronic Arts' world-wide studio facilities.

VII. Future Direction

As part of DEO's Division of Strategic Business Development, the OFE is fully integrated with Florida's overall economic development strategy, which allows the state to leverage the job creation value of the film and entertainment industry. The tools, talent, and resources available within DEO are invaluable as the OFE, along with its partners and stakeholders, participates in the development of its Five Year Strategic Plan to shape the future of the Florida film and entertainment industry.

Exhibits

I. Fiscal Year 2010 – 2016 Entertainment Industry Financial Incentive Program Summary

II. Entertainment Industry Financial Incentive fiscal year 2011-2012 Annual Report

III. Fiscal Year 2011 -2012 Entertainment Industry Financial Incentive Verified and Wrapped
Projects - Regional Breakout

IV. AFCI Production Revenue Tracking Guidelines

Endnotes

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2010/2016 ENTERTAINMENT INDUSTRY FINANCIAL INCENTIVE PROGRAM SUMMARY

Regional Summary

Regional Summary	# of Projects	%	Projected Total Florida Wages	%	Projected # of Florida Jobs Created	%	Estimated Room Nights	%	Qualified Florida Expenditures	%	Certified Tax Credit Award	%
CENTRAL EAST REGION	71	30.87%	$ 256,645,955	33.81%	15,732	9.78%	53,981	24.44%	$ 388,752,704	30.27%	$ 87,279,909	30.92%
BREVARD LAKE ORANGE SEMINOLE ST LUCIE VOLUSIA												
CENTRAL WEST REGION	18	7.83%	$ 16,185,953	2.13%	4,941	3.07%	13,807	6.25%	$ 34,594,068	2.69%	$ 9,579,290	3.39%
HERNANDO HILLSBOROUGH PINELLAS POLK MANATEE SARASOTA												
NORTH REGION	5	2.17%	$ 1,087,102	0.14%	281	0.17%	319	0.14%	$ 1,547,739	0.12%	$ 318,851	0.11%
LEON SUWANNEE ALACHUA DUVAL ST. JOHNS CLAY												
SOUTHEAST REGION	135	58.70%	$ 478,363,684	63.01%	139,165	86.49%	151,165	68.45%	$ 843,006,308	65.64%	$ 180,229,272	63.84%
MIAMI-DADE BROWARD PALM BEACH MONROE												
SOUTHWEST REGION	1	0.43%	$ 6,886,214	0.91%	779	0.48%	1,566	0.71%	$ 16,428,187	1.28%	$ 4,914,400	1.74%
COLLIER												
Totals	230	100.00%	$ 759,168,908	100.00%	160,898	100.00%	220,838	100.00%	$ 1,284,329,006	100.00%	$ 282,321,722	100.00%

Project Type Summary

Project Type		# of Projects	%	Projected Total Florida Wages	%	Projected # of Florida Jobs Created	%	Estimated Room Nights	%	Qualified Florida Expenditures	%	Certified Tax Credit Award	%
THEATRICAL MOTION PICTURE	*	42	18.26%	$ 164,246,405	21.64%	22,834	14.19%	90,128	40.81%	$ 275,202,616	21.43%	$ 56,319,429	19.95%
MADE FOR TV MOTION PICTURE		1	0.49%	$ 449,888	0.06%	237	0.15%	30	0.01%	$ 947,636	0.07%	$ 189,527	0.07%
DIRECT TO VIDEO MOTION PICTURE		4	1.96%	$ 9,649,416	1.27%	1,246	0.77%	2,449	1.11%	$ 14,709,883	1.15%	$ 3,816,868	1.35%
VISUAL EFFECTS FILMS		3	1.47%	$ 15,639,065	2.06%	364	0.23%	2,325	1.05%	$ 19,036,436	1.48%	$ 4,523,104	1.60%
DOCUMENTARIES		8	3.92%	$ 2,860,290	0.38%	96	0.06%	85	0.04%	$ 3,692,049	0.29%	$ 738,412	0.26%
VIDEO GAMES	*	17	8.33%	$ 107,617,665	14.18%	1,423	0.88%	1,935	0.88%	$ 178,996,484	13.94%	$ 48,330,926	17.12%
DIGITAL MEDIA PROJECTS		25	12.25%	$ 7,656,212	1.01%	429	0.27%	180	0.08%	$ 9,882,456	0.77%	$ 2,005,303	0.71%
COMMERCIALS	**	29	14.22%	$ 11,669,414	1.54%	5,816	3.61%	3,622	1.64%	$ 24,060,427	1.87%	$ 4,810,923	1.70%
TV SERIES	***	65	31.86%	$ 417,236,526	54.96%	116,725	72.55%	110,237	49.92%	$ 709,528,500	55.25%	$ 151,904,870	53.81%
TV SERIES - PILOT		7	3.43%	$ 10,493,188	1.38%	4,785	2.97%	4,002	1.81%	$ 20,121,411	1.57%	$ 4,024,280	1.43%
TV PRODUCTION - NON SERIES		29	14.22%	$ 11,650,839	1.53%	6,943	4.32%	5,845	2.65%	$ 28,151,108	2.19%	$ 5,658,080	2.00%
TOTAL PROJECTS		230	110.42%	$ 759,168,908	100.00%	160,898	100.00%	220,838	100.00%	$ 1,284,329,006	100.00%	$ 282,321,722	100.00%

* 23 FAMILY FRIENDLY PRODUCTIONS
(9 Theatrical MP; 14 Video Games)

** 29 BUNDLED COMMERCIAL APPLICATIONS
(83 INDIVIDUAL COMMERCIALS)

*** 5 HIGH IMPACT TV SERIES
(One Season = One Project)

PRODUCTION QUEUES	TAX CREDIT BALANCE 7/31/2012	TAX CREDITS AWARDED 7/31/2012	
GENERAL PRODUCTION QUEUE	$ 7,474,536	$ 27,740,093	(17)
COMMERCIAL & MUSIC VIDEO QUEUE	$ 3,926,019	$ 557,156	(4)
INDEPENDENT & EMERGING MEDIA QUEUE	$ 2,277,723	$ 598,510	(8)
APPLICATIONS RECEIVED	481	$ 28,895,759	(29)

PENDING PROJECTS - 7/31/2012	PROJECTED FLORIDA EXPENDITURES	PROJECTED TAX CREDIT CERTIFICATION
GENERAL PRODUCTION QUEUE - 8 PROJECTS	$ 38,146,489	$ 9,947,111
COMMERCIAL & MUSIC VIDEO QUEUE - 1 PROJECT	$ 585,063	$ 117,012
INDEPENDENT & EMERGING MEDIA QUEUE - 2 PROJECTS	$ 702,700	$ 157,283

ENTERTAINMENT INDUSTRY FINANCIAL INCENTIVE FY 2011/2012 ANNUAL REPORT

LOCATIONS	REGIONS	PROJECT TITLE	PROJECT TYPE	TOTAL ELIGIBLE FLORIDA WAGES	TOTAL QUALIFIED NON-WAGE FLORIDA EXPENDITURES	# OF FLORIDA POSITIONS CREATED - CREW	# OF FLORIDA POSITIONS CREATED - TALENT (CAST)	# OF FLORIDA POSITIONS CREATED - EXTRAS/STAND-INS	TOTAL # OF FLORIDA POSITIONS CREATED	ROOM NIGHTS	# OF PRODUCTION DAYS	LODGING EXPENDITURES	QUALIFIED FLORIDA EXPENDITURES	FINAL TAX CREDIT AWARD
		OFE REVIEW COMPLETED/ TAX CREDITS AWARDED												
BREVARD	**CE**	TRANSFORMERS 3	FEATURE FILM	$ 741,937.28	$ 1,745,824.27	130	0	355	485	3,520	8	$ 472,952	$ 2,487,762	$ 621,940
ORLANDO	**CE**	**TOOTH FAIRY 2 - FF**	FEATURE FILM	$ 2,351,219.90	$ 885,497.44	163	38	288	489	750	24	$ 55,151	$ 3,236,717	$ 809,179
ORLANDO	**CE**	RENEE PROJECT	FEATURE FILM	$ 1,413,136.74	$ 883,635.26	149	44	118	311	377	25	$ 30,079	$ 2,296,772	$ 459,354
ORLANDO	**CE**	**EA TIGER WOODS PGA 12 - FF**	VIDEO GAME	$ 7,738,873.57	$ 1,628,141.82	261	N/A	N/A	261	26	271	$ 3,873	$ 9,367,015	$ 2,341,753
ORLANDO	**CE**	BAD MOM PILOT	TV PILOT	$ 786,785.62	$ 512,037.33	95	10	126	231	365	7	$ 58,492	$ 1,298,823	$ 259,764
ORLANDO	**CE**	ELLEN DEGENERES SHOW	TV SEGMENT	$ 164,749.82	$ 618,089.05	114	0	0	114	446	1	$ 163,263	$ 782,839	$ 156,567
ORLANDO	**CE**	**EA NCAA FOOTBALL 2012 - FF**	VIDEO GAME	$ 10,088,615.00	$ 1,983,217.37	324	N/A	N/A	324	49	362	$ 7,766	$ 12,071,832	$ 3,017,958
ORLANDO	**CE**	**EA MADDEN NFL 2012 - FF**	VIDEO GAME	$ 12,814,384.95	$ 2,472,342.45	345	N/A	N/A	345	66	426	$ 10,603	$ 15,286,727	$ 3,821,681
VOLUSIA	**CE**	CASSADAGA	FEATURE FILM	$ 166,558.86	$ 459,469.42	51	26	141	218	260	18	$ 13,874	$ 626,028	$ 156,507
BROWARD	**SE**	TOUGH LOVE	TV SERIES	$ 297,870.00	$ 728,080.93	47	105	158	310	60	35	$ 30,185	$ 1,025,951	$ 205,190
MIAMI- DADE	**SE**	THE FINDER - PILOT	TV PILOT	$ 1,617,261.76	$ 1,154,806.40	200	17	156	373	329	10	$ 113,767	$ 2,772,068	$ 554,413
MIAMI- DADE	**SE**	ALQUIEN TE MIRA	TV SERIES	$ 3,877,628.00	$ 1,076,313.16	179	11	0	190	0	69	$ -	$ 4,953,941	$ 1,139,429
BROWARD	**SE**	THE GLADES - SEASON 2	TV SERIES	$ 9,405,788.46	$ 7,459,540.98	453	89	3,766	4,308	1,365	91	$ 110,120	$ 16,865,329	$ 3,373,065
ORLANDO	**CE**	GLENCOE BIOLOGY MINI-GAMES	DIGITAL MEDIA	$ 171,650.00	$ 26,636.00	13	N/A	N/A	13	0	168	$ -	$ 198,286	$ 39,500
BROWARD/MIAMI	**SE**	TAKE THE MONEY AND RUN	TV SERIES	$ 90,350.00	$ 197,994.03	42	3	0	45	860	15	$ 101,742	$ 288,344	$ 57,668
BROWARD/MIAMI	**SE**	IF YOU ONLY KNEW	FEATURE	$ 324,009.98	$ 176,491.17	44	18	55	117	70	18	$ 2,518	$ 500,501	$ 125,000
DUCK KEY	**SE**	THE LAST RESORT	TV PILOT	$ 180,065.73	$ 192,741.08	37	10	0	47	228	6	$ 137,720	$ 372,807	$ 74,561
THROUGHOUT FLORIDA	**CE**	HOW TO DO FLORIDA	TV SERIES	$ 81,858.51	$ 88,655.94	27	2	0	29	42	108	$ 3,030	$ 170,514	$ 33,306
ORLANDO	**CE**	SUPER SUITE BIOLOGY	DIGITAL MEDIA	$ 521,437.83	$ 110,172.71	20	N/A	N/A	20	0	380	$ -	$ 631,611	$ 125,000
ORLANDO	**CE**	SUPER SUITE ALGEBRA I	DIGITAL MEDIA	$ 494,949.93	$ 93,245.06	23	N/A	N/A	23	0	380	$ -	$ 588,195	$ 117,639
ORLANDO	**CE**	MY FAIR LIDY	FEATURE FILM	$ 10,939.80	$ 92,406.84	7	25	9	41	30	18	$ 6,210	$ 103,347	$ 25,836
MIAMI- DADE	**SE**	PICTURE PARK - JUST FOR MEN	COMMERCIAL	$ 367,417.08	$ 337,086.56	106	0	69	175	79	10	$ 15,800	$ 704,504	$ 140,900
MIAMI- DADE	**SE**	MEDIAMAX - FREDDY/OPTIC 2000	COMMERCIAL	$ 254,845.43	$ 231,861.04	141	5	5	151	161	5	$ 33,284	$ 486,706	$ 91,000
ORLANDO/MIAMI	**CE/SE**	GO FILM	COMMERCIAL	$ 531,305.04	$ 343,302.64	180	34	75	289	109	8	$ 33,629	$ 874,608	$ 174,921
BROWARD/MIAMI	**SE**	SHOOT FLORIDA - CABLEVISION/GATORADE/HYUNDAI	COMMERCIAL	$ 378,032.35	$ 373,643.70	147	0	0	147	210	7	$ 38,210	$ 751,676	$ 150,335
		25 Projects - VERIFIED DATA		**$ 54,871,671.64**	**$ 23,871,232.65**	**3,298**	**437**	**5,321**	**9,056**	**9,402**	**2,470**	**$ 1,442,268**	**$ 78,742,904.29**	**$ 18,072,466**
		CPA AUDIT/REPORT SUBMITTED OFE REVIEW IN PROGRESS		**AS PER CPA**	**AS PER CPA**									
MIAMI- DADE	**SE**	BURN NOTICE - SEASON 5	TV SERIES	$ 15,404,492.00	$ 10,625,051.00	697	162	1,682	2,541	2,905	126	$ 391,361	$ 26,029,543	$ 5,205,909
CHARLOTTE/ORLANDO	**CE**	MY BIG REDNECK WEDDING - SEASON 4	TV SERIES	$ 409,430.00	$ 729,662.00	46	2	0	48	48	20	$ -	$ 1,139,092	$ 227,818
HILLSBOROUGH/PINELLAS	**CW**	MAGIC MIKE	FEATURE FILM	$ 402,154.00	$ 548,582.00	62	7	339	408	812	6	$ 105,882	$ 950,736	$ 237,684
MIAMI- DADE	**SE**	THE FINDER - SEASON 1	TV SERIES	$ 988,616.00	$ 832,507.00	199	0	248	447	891	30	$ 100,177	$ 1,821,123	$ 364,225
MIAMI- DADE	**SE**	MIRA QUIEN BAILA	TV SERIES	$ 358,066.00	$ 2,551,973.57	75	0	0	75	0	71	$ -	$ 2,910,040	$ 380,741
CORAL GABLES	**SE**	PREMIOS JUVENTUD 2011	TV SPECIAL	$ 324,567.70	$ 1,556,508.83	268	0	0	268	1,157	1	$ -	$ 1,881,077	$ 376,215
MIAMI- DADE	**SE**	PROJECT RUNWAY - LATIN AMERICA	TV SERIES	$ 249,264.00	$ 947,474.00	30	0	0	30	225	49	$ 12,200	$ 1,196,738	$ 265,924
PINELLAS	**CW**	SUNLIGHT JR.	FEATURE FILM	$ 273,993.00	$ 432,715.00	76	0	103	179	68	22	$ 17,905	$ 706,708	$ 176,677
PALM BEACH	**SE**	PARKER	FEATURE FILM	$ 1,194,856.00	$ 1,013,195.00	194	0	283	477	1,006	12	$ 240,319	$ 2,208,051	$ 424,820
ORLANDO	**CE**	CALL OF DUTY 3DS	VIDEO GAME	$ 539,406.21	$ 91,624.64	28	N/A	N/A	28	0	338	$ -	$ 631,031	$ 126,206
MIAMI- DADE	**SE**	MAGIC CITY - SEASON 1	TV SERIES	$ 16,912,889.62	$ 12,851,456.99	626	128	1,567	2,321	5,832	88	$ 1,095,436	$ 29,764,347	$ 6,650,309
MIAMI- DADE	**SE**	CASO CERRADO 2010	TV SERIES	$ 2,077,336.00	$ 2,385,597.00	89	1	61	151	391	66	$ 53,048	$ 4,462,933	$ 892,587
MIAMI- DADE	**SE**	LEVANTATE	TV SERIES	$ 3,796,037.00	$ 878,145.00	110	5	0	115	0	235	$ -	$ 4,674,182	$ 866,464
BROWARD/MIAMI	**SE**	MI CORAZON INSISTE	TV SERIES	$ 6,017,425.00	$ 2,975,888.00	238	24	908	1,170	0	132	$ -	$ 8,993,313	$ 2,248,328
MIAMI- DADE	**SE**	RPM/ASFALTO	TV MINISERIES	$ 625,809.00	$ 398,076.00	108	20	133	261	0	30	$ -	$ 1,023,885	$ 196,769
ST LUCIE	**CE**	SPHERE IN SPHERE	VFX	$ 964,799.00	$ 612,686.00	110	N/A	N/A	110	0	151	$ -	$ 1,577,485	$ 315,497
MIAMI- DADE	**SE**	NITIDIO 2011	TV SERIES	$ 788,177.00	$ 70,042.00	22	2	0	24	0	48	$ -	$ 858,219	$ 171,644
MIAMI- DADE	**SE**	BILLBOARD LATIN MUSIC AWARDS SHOW 2011	TV SPECIAL	$ 371,136.00	$ 1,745,171.00	211	0	0	211	300	1	$ 67,378	$ 2,116,307	$ 423,261
MIAMI- DADE	**SE**	LA CASA DE AL LADO	TV SERIES	$ 6,939,202.00	$ 1,456,899.00	256	9	187	452	0	117	$ -	$ 8,396,101	$ 1,628,773
MIAMI- DADE	**SE**	CASA CERRADA 2011	TV SERIES	$ 2,989,722.00	$ 3,624,066.00	69	1	688	758	480	155	$ 72,039	$ 6,613,788	$ 1,322,758
BROWARD/MIAMI	**SE**	CORIZON APISIONADO	TV SERIES	$ 6,651,851.40	$ 4,124,167.16	160	28	492	680	2,768	170	$ 126,333	$ 10,776,019	$ 2,694,005
BROWARD/MIAMI	**SE**	ROCK OF AGES	FEATURE FILM	$ 12,281,059.00	$ 14,862,140.00	632	104	2,189	2,925	14,360	61	$ 1,754,431	$ 27,143,199	$ 6,785,800
MIAMI- DADE	**SE**	EL GRAN SHOW	TV SERIES	$ 726,507.00	$ 1,855,782.00	87	13	476	576	36	27	$ 2,021	$ 2,582,289	$ 645,572
TAMPA/ST PETE/SARASOTA	**CW**	**THE INVESTIGATOR - FF**	FEATURE FILM	$ 233,853.00	$ 109,260.00	47	33	17	97	60	21	$ -	$ 343,113	$ 102,934
ORLANDO	**CE**	MOM'S HOMEROOM	DIGITAL MEDIA	$ 140,519.99	$ 41,512.47	9	8	0	17	58	132	$ 5,706	$ 182,032	$ 36,406
MIAMI- DADE	**SE**	STUDIO TR3S - RICKEY MARTIN	TV SPECIAL	$ 37,068.00	$ 169,847.00	23	0	0	23	2	2	$ -	$ 206,915	$ 41,383
MIAMI- DADE	**SE**	BILLBOARD LATIN MUSIC RED CARPET SHOW 2011	TV PRODUCTION	$ 61,618.00	$ 176,609.00	69	1	0	70	0	1	$ -	$ 238,227	$ 47,645
MIAMI- DADE	**SE**	MUSIC MY GUEY	TV SERIES	$ 153,706.00	$ -	5	0	0	5	0	250	$ -	$ 153,706	$ 28,160
PALM BEACH	**SE**	AUGMENTED REALITY SIMULATION FOR MEDICAL STUDENTS	DIGITAL MEDIA	$ 63,852.79	$ 58,498.64	8	N/A	N/A	8	0	1,339	$ -	$ 122,351	$ 24,470
ORANGE	**CE**	SUPER SUITE ALGEBRA II	DIGITAL MEDIA	$ 214,040.11	$ 43,413.54	13	N/A	N/A	13	0	184	$ -	$ 257,454	$ 50,000
ORANGE	**CE**	SUPER SUITE GEOMETRY	DIGITAL MEDIA	$ 195,781.42	$ 42,161.77	12	N/A	N/A	12	0	184	$ -	$ 237,943	$ 47,589
MIAMI/BREVARD	**SE**	MEDIAMAX - COSTA CRUISE/CADUM/LA REDOUTE	COMMERCIAL	$ 476,207.34	$ 518,289.66	155	3	53	211	240	14	$ 79,063	$ 994,497	$ 198,899
ORLANDO	**CE**	HSI - GATORADE	COMMERCIAL	$ 197,926.65	$ 162,530.83	58	1	127	186	86	2	$ 13,073	$ 360,457	$ 72,091
DUVAL	**N**	HSI - WESTIN	COMMERCIAL	$ 58,887.66	$ 47,017.34	41	0	0	41	47	1	$ 4,601	$ 105,905	$ 21,181
MIAMI- DADE	**SE**	HSI - VOLKSWAGEN	COMMERCIAL	$ 65,212.07	$ 50,210.85	39	0	0	39	18	1	$ 6,190	$ 115,423	$ 23,085
BROWARD/MIAMI	**SE**	SMUGGLER - GATORADE	COMMERCIAL	$ 547,122.00	$ 365,722.00	131	145		276	26	5	$ 73,565	$ 912,844	$ 182,569
MIAMI- DADE	**SE**	IMPERIAL WOODPECKER - NIKE/CHEVROLET/DIRECT TV	COMMERCIAL	$ 428,392.17	$ 1,136,476.91	133	N/A	N/A	133	538	10	$ 163,396	$ 1,564,869	$ 312,974
MIAMI- DADE	**SE**	RIVERTREE - MAGNUM ICE CREAM	COMMERCIAL	$ 242,016.67	$ 410,421.03	51	3	53	107	6	4	$ 847	$ 652,438	$ 130,488
MIAMI- DADE	**SE**	HOLMES DOTF - DIET PEPSI COMMERCIAL	COMMERCIAL	$ 271,312.00	$ 271,548.00	61	4	111	176	120	2	$ 57,916	$ 542,860	$ 108,572
MIAMI- DADE	**SE**	FLORIDA FILM PRODUCTION - EURO LOTTERY/MCDONALDS	COMMERCIAL	$ 228,113.00	$ 231,251.00	104	16	78	198	67	4	$ 13,500	$ 459,364	$ 91,873
MIAMI- DADE	**SE**	FLORIDA FILM PRODUCTION - BASKETBALL WIVES	COMMERCIAL	$ 85,540.00	$ 129,446.00	55	8	11	74	20	1	$ 4,500	$ 214,986	$ 42,997
HILLSBOROUGH	**CW**	ARGYLE BROTHERS - PUBLIX COMMERCIALS	COMMERCIAL	$ 660,632.00	$ 513,160.00	183	0	0	183	290	18	$ 74,959	$ 1,173,792	$ 234,758
		42 Projects - UNVERIFIED DATA		**$ 85,648,595.80**	**$ 71,646,785.23**	**5,590**	**728**	**9,806**	**16,124**	**32,857**	**4,131**	**$ 4,535,846.78**	**$ 157,295,381**	**$ 34,426,060**

ENTERTAINMENT INDUSTRY FINANCIAL INCENTIVE FY 2011/2012 ANNUAL REPORT

LOCATIONS	REGIONS	PROJECT TITLE	PROJECT TYPE	TOTAL ELIGIBLE FLORIDA WAGES	TOTAL QUALIFIED NON-WAGE FLORIDA EXPENDITURES	# OF FLORIDA POSITIONS CREATED - CREW	# OF FLORIDA POSITIONS CREATED - TALENT (CAST)	# OF FLORIDA POSITIONS CREATED - EXTRAS/STAND-INS	TOTAL # OF FLORIDA POSITIONS CREATED	ROOM NIGHTS	# OF PRODUCTION DAYS	LODGING EXPENDITURES	QUALIFIED FLORIDA EXPENDITURES	FINAL TAX CREDIT AWARD
		PROJECT COMPLETED/ AWAITING CPA AUDIT/FINAL REPORT												
		QUEUE A - GENERAL PRODUCTIONS $625K+ (31)												**CERTIFICATION AMOUNT**
ORLANDO	CE	THE INBETWEENERS - PILOT PRESENTATION	TV SERIES PILOT	$ 552,095	$ 142,976.00				387	79	4		$ 695,071	$ 139,014
ORLANDO	CE	BIG MIKE - PILOT	TV SERIES PILOT	$ 1,760,825	$ 1,659,760.00				951	1,735	13		$ 3,420,585	$ 684,117
BROWARD/MIAMI	SE	GRACHI - SEASON 1	TV SERIES	$ 2,285,058	$ 1,754,089.00				277	97	87		$ 4,039,147	$ 807,829
BROWARD/MIAMI	SE	VENOM ONE/SWAMP CITY (II)	TV SERIES	$ 1,244,944	$ 378,737.00				28	0	168		$ 1,623,681	$ 324,736
MIAMI- DADE	SE	CHARLIE'S ANGELS (III) - PILOT	TV SERIES PILOT	$ 4,130,945	$ 3,372,598.00				1,801	1,097	18		$ 7,503,543	$ 1,500,708
MIAMI- DADE	SE	MATILDA	MADE FOR TV	$ 449,888	$ 497,748.00				237	30	15		$ 947,636	$ 189,527
MIAMI- DADE	SE	COLOR SPLASH	TV SERIES	$ 1,245,285	$ 1,249,095.00				18	30	130		$ 2,494,380	$ 498,876
ORLANDO	CE	**TIGER WOODS PGA TOUR 2013 - FF**	VIDEO GAME	$ 10,878,767	$ 7,078,996.00				76	170	455		$ 17,957,763	$ 4,489,440
BROWARD/MIAMI	SE	TALISMAN	TV SERIES	$ 4,839,361	$ 5,993,003.00				1,085	1,500	60		$ 10,832,364	$ 2,708,091
BROWARD	SE	FINDING JOY	FEATURE	$ 942,233	$ 840,824.00				293	475	24		$ 1,783,057	$ 445,764
ORLANDO	CE	THE INBETWEENERS - SEASON 1	TV SERIES	$ 4,781,550	$ 3,310,151.00				1,757	428	57		$ 8,091,701	$ 2,022,925
MIAMI- DADE	SE	GRACHI - SEASON 2	TV SERIES	$ 1,506,028	$ 1,161,312.00				158	90	47		$ 2,667,340	$ 666,835
MIAMI- DADE	SE	STEP UP REVOLUTION	FEATURE	$ 7,706,898	$ 11,593,950.00				1,107	5,332	50		$ 19,300,848	$ 4,825,212
MIAMI- DADE	SE	CHARLIE'S ANGELS - SEASON 1	TV SERIES	$ 31,965,208	$ 23,257,481.00				17,944	676	176		$ 55,222,689	$ 8,000,000
ORLANDO/VOLUSIA	CE	MISSIONARY	FEATURE	$ 488,009	$ 356,638.00				180	62	18		$ 844,647	$ 211,161
MIAMI- DADE	SE	GRACHI - SEASON 3	TV SERIES	$ 1,700,490	$ 1,358,062.00				160	90	60		$ 3,058,552	$ 764,638
MIAMI- DADE	SE	UNA MAID IN MAHANTTAN	TV SERIES	$ 7,577,267	$ 3,458,608.00				168	10	113		$ 11,035,875	$ 2,207,175
MIAMI- DADE	SE	PREMIO LO NUESTRO 2012	TV SPECIAL	$ 555,227	$ 2,407,500.00				110	1,161	1		$ 2,962,727	$ 592,545
PINELLAS	CW	SPRING BREAKERS	FEATURE	$ 2,085,556	$ 1,173,225.00				561		30		$ 3,258,781	$ 814,695
MIAMI- DADE	SE	PAIN AND GAIN	FEATURE	$ 10,089,402	$ 10,751,808.00				1,639	4,800	47		$ 20,841,210	$ 4,168,242
ORLANDO/VOLUSIA	CE	**RING THE BELL -FF**	FEATURE	$ 490,122	$ 294,111.00				79	44	32		$ 784,233	$ 196,058
ORLANDO	CE	**SKYLANDERS 3DS - FF**	VIDEO GAME	$ 2,182,800	$ 327,420.00				27	0	122		$ 2,510,220	$ 753,066
MIAMI- DADE	SE	WWE WRESTLEMANIA XXVIII	TV SPECIAL	$ 2,255,000	$ 1,945,000.00				168	800	2		$ 4,200,000	$ 840,000
MIAMI- DADE	SE	BILLBOARD LATIN MUSIC AWARDS 2012	TV SPECIAL	$ 887,170	$ 1,816,278.00				187	50	1		$ 2,703,448	$ 540,689
MIAMI- DADE	SE	BURN NOTICE - SEASON 6	TV SERIES	$ 13,476,566	$ 17,585,674.00				4,308	2,844	126		$ 31,062,240	$ 6,212,448
BROWARD	SE	THE GLADES - SEASON 3	TV SERIES	$ 9,926,020	$ 6,721,917.00				2,905	3,933	91		$ 16,647,937	$ 3,329,586
MIAMI- DADE	SE	PA'LANTE CON CRISTINA	TV SERIES	$ 4,413,269	$ 2,794,490.00				92	720	52		$ 7,207,759	$ 1,441,551
ORLANDO	CE	**NCAA FOOTBALL 2013 - FF**	VIDEO GAME	$ 6,702,599	$ 5,614,199.00				67	150	396		$ 12,316,798	$ 3,079,199
ORLANDO	CE	**MADDEN NFL 2013 - FF**	VIDEO GAME	$ 12,920,923	$ 14,673,261.00				100	200	427		$ 27,594,184	$ 6,898,546
MIAMI- DADE	SE	PREMIO JUVENTUD 2012	TV SPECIAL	$ 636,858	$ 1,959,286.00				113	1,272	1		$ 2,596,144	$ 519,228
MIAMI- DADE	SE	PREMIOS TU MUNDO 2012	TV SPECIAL	$ 553,811	$ 920,299.00				121	50	1		$ 1,474,110	$ 294,822
				$ 151,230,174	**$ 136,448,496**				**37,104**	**27,925**	**2,824**	**$ -**	**$ 287,678,670**	**$ 60,166,723**
		QUEUE C - INDEPENDENT & EMERGING MEDIA $100K - $625K (55)												
MIAMI- DADE	CE	REAL FOOD REAL KITCHENS	TV SERIES	$ 57,000	$ 55,092.00				5	15	14		$ 112,092	$ 28,023
MANATEE/SARASOTA	CW	**BEAUTIFUL NOISE - FF**	FEATURE	$ 186,787	$ 108,904.00				1,104	60	22		$ 295,691	$ 88,707
ALACHUA/HILLSBOR/PINELLAS	CW	**DIVING FOR THE CROSS - FF**	FEATURE	$ 368,310	$ 104,350.00				142	40	18		$ 472,660	$ 118,165
MIAMI- DADE	SE	SOBE REAL	FEATURE	$ 389,109	$ 210,804.00				466	0	20		$ 599,913	$ 149,978
BOCA RATON	SE	INFORMED CONSENT FOR PED. CLINICAL TRIALS	DIGITAL MEDIA	$ 70,359	$ 31,904.00				12	0	243		$ 102,263	$ 20,453
BOCA RATON	SE	TEACHING MEDICAL STUDENTS	DIGITAL MEDIA	$ 106,011	$ 26,154.00				6	0	245		$ 132,165	$ 26,433
MIAMI- DADE	SE	CONFESIONES DE NOVELA	TV VARIETY	$ 469,820	$ 127,305.00				54	160	216		$ 597,125	$ 119,425
MIAMI- DADE	SE	STUDIO TR3S	TV SERIES	$ 139,585	$ 123,166.00				38	2	2		$ 262,751	$ 52,550
BROWARD/MIAMI	SE	TR3S QUIERO MIS QUINCES (III)	TV SERIES	$ 128,575	$ 27,533.00				26	30	15		$ 156,108	$ 31,221
PALM BEACH	SE	INFORMED CONSENT FOR CARDIAC PROCEDURES	DIGITAL MEDIA	$ 423,423	$ 99,717.00				14	0	580		$ 523,140	$ 104,628
ALACH/LEON/PALMB/PINELL	N/SE/CW	ZERO ENERGY AMERICA	DOCUMENTARY	$ 330,000	$ (7,641.00)				16	0	210		$ 322,359	$ 64,472
ALACHUA	N	AFTERLIFE	VIDEO GAME	$ 520,000	$ 54,300.00				12	0	327		$ 574,300	$ 114,860
BROWARD/MIAMI/PALM B.	SE	TR3S QUE TE PICA	TV SERIES	$ 421,469	$ 29,372.00				8	0	246		$ 450,841	$ 90,168
MIAMI- DADE	SE	BROKE	DOCUMENTARY	$ 375,000	$ 121,250.00				10	10	20		$ 496,250	$ 99,250
ALACH/BREV/CLAY/DUV/HILLS/ORANGE/ST.JOHNS/VOLUSIA	N/CE/CW	LIVE LIFE A LITTLE GREENER	DIGITAL MEDIA	$ 323,340	$ 204,285.00				18	42	26		$ 527,625	$ 105,525
BREVARD/LAKE/ORANGE/OSC	CE	A PERFECT DATE	FEATURE	$ 247,904	$ 214,814.00				105	201	19		$ 462,718	$ 115,679
SARASOTA	CW	THE PERFECT WEDDING	FEATURE	$ 70,080	$ 83,640.00				31	340	18		$ 153,720	$ 38,430
MIAMI/ORLANDO	SE/CE	TR3S QUIREO MI BODA	TV SERIES	$ 216,379	$ 49,580.00				28	36	30		$ 265,959	$ 53,191
ORANGE	CE	SUPER SUITE PHYSICS	DIGITAL MEDIA	$ 200,000	$ 50,000.00				20	0	304		$ 250,000	$ 50,000
ORANGE	CE	SUPER SUITE CHEMISTRY	DIGITAL MEDIA	$ 200,000	$ 50,000.00				20	0	274		$ 250,000	$ 50,000
ORANGE	CE	SUPER SUITE PHYSICAL SCIENCE	DIGITAL MEDIA	$ 200,000	$ 50,000.00				20	0	243		$ 250,000	$ 50,000
ORANGE	CE	SUPER SUITE PRE-CALCULUS	DIGITAL MEDIA	$ 200,000	$ 50,000.00				20	0	215		$ 250,000	$ 50,000
ORANGE	CE	SUPER SUITE ALGEBRA 2	DIGITAL MEDIA	$ 20,000	$ 230,000.00				20	0	184		$ 250,000	$ 50,000
LAKE	CE	THE CONGRESSMAN'S DINNER	FEATURE	$ 126,827	$ 17,681.00				36	0	18		$ 144,508	$ 36,127
MIAMI/ORLANDO	SE/CE	TR3S QUIRO MI BODA - SUMMER SPECIAL	TV SPECIAL	$ 109,082	$ 17,982.00				28	36	15		$ 127,064	$ 31,765
MIAMI	SE	WEEKENDS WITH LUIS	TV SERIES	$ 266,200	$ 161,598.00				18	16	18		$ 427,798	$ 106,949
MIAMI/MONROE	SE	EL EMPANTANADO	FEATURE	$ 11,400	$ 98,301.00				52	60	27		$ 109,701	$ 27,425
SEMINOLE	CE	TWO DAYS	FEATURE	$ 124,885	$ 125,534.00				153	180	24		$ 250,419	$ 62,604
SARASOTA	CW	FREE RIDE	FEATURE	$ 243,186	$ 237,463.00				61	50	25		$ 480,649	$ 120,162
MIAMI- DADE	SE	EENIE MEENIE MINEY MOE	FEATURE	$ 191,300	$ 128,458.00				182	50	27		$ 319,758	$ 79,939
MIAMI- DADE	SE	PREMIO LO NUESTRO 2012 - RED CARPET SHOW	TV SPECIAL	$ 14,676	$ 367,927.00				11	1	1		$ 382,603	$ 76,520
DUVAL	N	AMERICA'S MOST WANTED	TV SERIES	$ 114,012	$ 72,052.00				95		4		$ 186,064	$ 46,516
SARASOTA	CW	BLIND PASS	FEATURE	$ 291,300	$ 63,696.00				64	100	32		$ 354,996	$ 70,999
MIAMI- DADE	SE	TR3S JUANES UNPLUGGED	TV SPECIAL	$ 175,809	$ 221,372.00				50	37	4		$ 397,181	$ 79,436
MIAMI- DADE	SE	TR3S LO QUE TE PICA 2012	TV SERIES	$ 345,189	$ 49,781.00				13	0	115		$ 394,970	$ 78,994
MIAMI- DADE	SE	TR3S QUIERO MI BABY - SEASON 1	TV SERIES	$ 101,651	$ 20,620.00				20	0	12		$ 122,271	$ 24,454
ORANGE	CE	**THE JOCKEY CLUB - FF**	VIDEO GAME	$ 444,800	$ 132,700.00				13	0	145		$ 577,500	$ 144,375
MIAMI/HILLSBOROUGH	SE/CW	TR3S QUIERO MI BODA - SPRING SPECIAL	TV SERIES	$ 219,593	$ 46,162.00				31	36	25		$ 265,755	$ 53,151
MIAMI- DADE	SE	TR3S QUIERO MI BABY - SPRING SPECIAL	TV SERIES	$ 105,651	$ 16,620.00				20	0	25		$ 122,271	$ 24,454
BROWARD/MIAMI	SE	ASSUMED MEMORIES	FEATURE	$ 135,200	$ 55,045.00				46	36	18		$ 190,245	$ 47,561
ORANGE	CE	**WRIGLEY'S - FF**	VIDEO GAME	$ 200,008	$ 30,001.00				8	0	97		$ 230,009	$ 57,502
MIAMI/ORLANDO	SE/CE	TR3S QUIERO MI BODA - SEASON 5	TV SERIES	$ 219,593	$ 46,162.00				32	36	50		$ 265,755	$ 53,151
BROWARD	SE	TR3S QUIERO MI BABY - SUMMER SPECIAL	TV SERIES	$ 101,651	$ 20,620.00				20	0	25		$ 122,271	$ 24,454
MIAMI- DADE	SE	TR3S QUIERO MIS QUINCES - SEASON 8	TV SERIES	$ 107,464	$ 19,063.00				30	0	25		$ 126,527	$ 25,305
MIAMI- DADE	SE	BILLBOARD LATIN MUSIC AWARDS RED CARPET SHOW-2012	TV SPECIAL	$ 204,341	$ 221,901.00				92	5	1		$ 426,242	$ 85,248

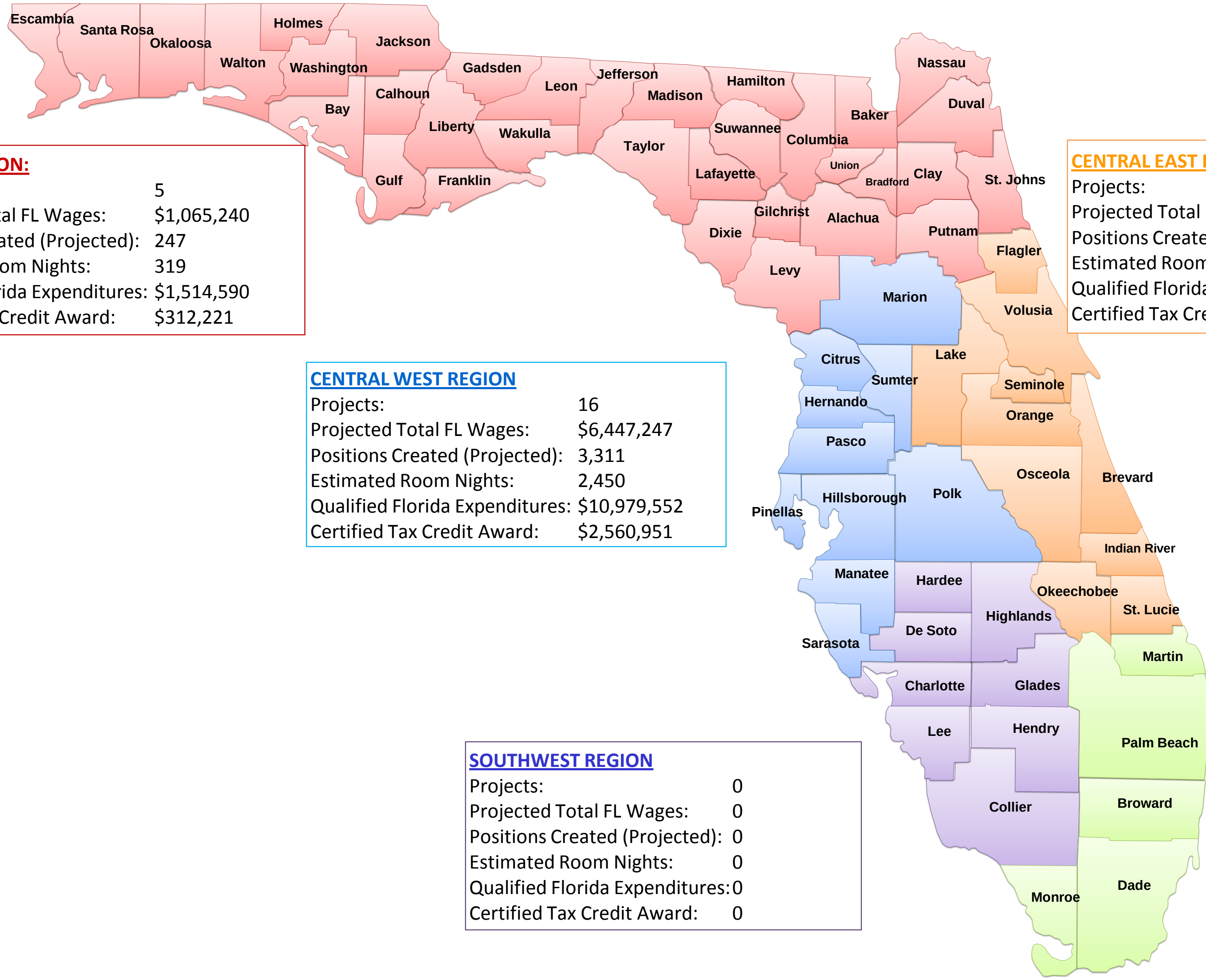
ENTERTAINMENT INDUSTRY FINANCIAL INCENTIVE FY 2011/2012 ANNUAL REPORT

LOCATIONS	REGIONS	PROJECT TITLE	PROJECT TYPE	TOTAL ELIGIBLE FLORIDA WAGES	TOTAL QUALIFIED NON-WAGE FLORIDA EXPENDITURES	# OF FLORIDA POSITIONS CREATED - CREW	# OF FLORIDA POSITIONS CREATED - TALENT (CAST)	# OF FLORIDA POSITIONS CREATED - EXTRAS/STAND-INS	TOTAL # OF FLORIDA POSITIONS CREATED	ROOM NIGHTS	# OF PRODUCTION DAYS	LODGING EXPENDITURES	QUALIFIED FLORIDA EXPENDITURES	FINAL TAX CREDIT AWARD
ORANGE	**CE**	MYA AND HER MOMS	DIGITAL MEDIA	$ 77,204	$ 27,934.00				18	0	10		$ 105,138	$ 21,027
ALACH/DADE/ESCAM/HILLS/LEVY/MONR/OSCE/VOL	**N/CE/CW/SE**	HOW TO DO FLORIDA - SEASON 3	TV SERIES	$ 145,340	$ 57,325.00				21	108	27		$ 202,665	$ 40,533
MIAMI- DADE	**SE**	OCEAN MODELS	TV SERIES	$ 347,045	$ 277,928.00				27	16	106		$ 624,973	$ 124,994
ORANGE/SEMINOLE	**CE**	ROCKABILLY ZOMBIE WEEKEND	FEATURE	$ 110,816	$ 89,349.00				62	2	20		$ 200,165	$ 40,033
BROWARD	**SE**	TR3S QUIERO MI BBY - SEASON B	TV SERIES	$ 97,026	$ 16,620.00				21	0	25		$ 113,646	$ 22,729
ORANGE	**CE**	AN ACT OF GOD	FEATURE	$ 207,678	$ 167,735.00				396	203	25		$ 375,413	$ 93,603
MIAMI- DADE	**SE**	PREMIO JUVENTUD 2012 - RED CARPET SHOW	TV SPECIAL	$ 136,160	$ 280,671.00				45	0	11		$ 416,831	$ 83,366
HILLSBOROUGH/ORANGE	**CW/CE**	CAFÉ MOM - DINNER BOOT CAMP	DIGITAL MEDIA	$ 98,710	$ 25,850.00				25	0	10		$ 124,560	$ 24,912
MIAMI- DADE	**SE**	LA ALFOMBRA DE PREMIOS TU MUNDO 2012	TV SPECIAL	$ 94,860	$ 199,881.00				69	5	1		$ 294,741	$ 58,948
HILLSBOROUGH	**CW**	TR3S QUIERO MI BABY - FALL SPECIAL	TV SERIES	$ 109,290	$ 36,088.00				20	50	25		$ 145,378	$ 29,075
				$ 10,941,098	**$ 5,444,649.00**				**3,974**	**1,963**	**4,484**	**$ -**	**$ 16,385,747**	**$ 3,567,469**
		QUEUE B - COMMERCIALS/MUSIC VIDEOS (16)												
ORLANDO	**CE**	ADRENALINE FILM PRODUCTIONS, INC.	COMMERCIAL	$ 711,945	$ 187,657				131	10	14		$ 899,602	$ 179,920
ORLANDO	**CE**	ADRENALINE FILM PRODUCTIONS, INC.	COMMERCIAL	$ 77,000	$ 83,000				48	3	2		$ 160,000	$ 32,000
MIAMI- DADE	**SE**	BRIGHT PICTURES	COMMERCIAL	$ 230,742	$ 291,334				63	5	5		$ 522,076	$ 104,415
MIAMI- DADE	**SE**	FLORIDA FILM PRODUCTION OFFICE-BASKETBALL WIVES	COMMERCIAL	$ 95,000	$ 175,000				85	25	1		$ 270,000	$ 54,000
MIAMI- DADE	**SE**	PARADOXAL - PUMA/LECLERC/MTV MOBILE	COMMERCIAL	$ 500,000	$ 630,000				242	120	9		$ 1,130,000	$ 226,000
ALACHUA	**N**	FLORIDA FILM PRODUCTION OFFICE-ONLY JEANS	COMMERCIAL	$ 49,000	$ 71,000				81	250	4		$ 120,000	$ 24,000
MIAMI/VOLUSIA	**SE/CE**	MJZ-TOYOTA/ACURA	COMMERCIAL	$ 370,226	$ 497,922				153	26	7		$ 868,148	$ 173,629
ORANGE/PALM B./PINELLAS	**CE/SE/CW**	STATION FILM - B&N/CARNIVAL/HEAD&SHOULDERS/DAILYS	COMMERCIAL	$ 468,803	$ 551,851				197	160	8		$ 1,020,654	$ 204,130
MIAMI- DADE	**SE**	LETCA - SABRITAS/COLGATE/MAID IN MANHATTAN	COMMERCIAL	$ 575,000	$ 495,000				269	40	8		$ 1,070,000	$ 214,000
MIAMI- DADE	**SE**	CORTEZ BROTHERS - DIRECT TV/VW/WENDYS	COMMERCIAL	$ 440,000	$ 760,000				250	80	8		$ 1,200,000	$ 24,000
MIAMI- DADE	**SE**	SOAH FILMS - ITT TECH	COMMERCIAL	$ 802,000	$ 632,000				220	80	20		$ 1,434,000	$ 286,800
HILLSBOROUGH	**CW**	THE FILMHOUSE - PUBLIX	COMMERCIAL	$ 405,000	$ 505,000				192	384	9		$ 910,000	$ 182,000
BROWARD/COLLIER/MIAMI	**SE/SW**	2C MEDIA- DISH NETWORK/ANIMAL PLANET/TRAVEL/HBO	COMMERCIAL	$ 306,867	$ 260,511				128	42	7		$ 567,378	$ 113,475
BROWARD/MIAMI/PALM B.	**SE**	SHOOT COLLECTIVE - CITIBANK/FLORIDA BLUE/CHA	COMMERCIAL	$ 868,162	$ 1,087,920				926	321	16		$ 1,956,082	$ 391,216
MIAMI/ORANGE	**SE/CE**	HABANA AVENUE - ESPN	COMMERCIAL	$ 407,742	$ 342,208				181	210	4		$ 749,950	$ 149,990
BROWARD/MIAMI/PALM B.	**SE**	UBER CONTENT - OFFICE DEPOT/ORBITZ	COMMERCIAL	$ 287,954	$ 436,347				187	75	5		$ 724,301	$ 144,860
				$ 6,595,441	**$ 7,006,750**				**3,353**	**1,831**	**127**	**$ -**	**$ 13,602,191**	**$ 2,504,435**

GRAND TOTALS
ALL FY 2011-2012 PROJECTS

(INCLUDES UNVERIFIED DATA)									LODGING FOR VERIFIED PROJECTS ONLY		TOTAL CREDITS AWARDED AND CERTIFIED
169	**$ 309,286,980**	**$ 244,417,913**	**8,888**	**1,165**	**15,127**	**69,611**	**73,978**	**14,036**	**$ 5,978,114**	**$ 553,704,893**	**$ 118,737,153**

NOTE: BOLDED - FF = FAMILY FRIENDLY PRODUCTION



NORTH REGION:

Projects:	5
Projected Total FL Wages:	$1,065,240
Positions Created (Projected):	247
Estimated Room Nights:	319
Qualified Florida Expenditures:	$1,514,590
Certified Tax Credit Award:	$312,221

CENTRAL EAST REGION

Projects:	52
Projected Total FL Wages:	$85,802,199
Positions Created(Projected):	8,593
Estimated Room Nights:	10,104
Qualified Florida Expenditures:	$135,002,395
Certified Tax Credit Award:	$32,899,895

CENTRAL WEST REGION

Projects:	16
Projected Total FL Wages:	$6,447,247
Positions Created (Projected):	3,311
Estimated Room Nights:	2,450
Qualified Florida Expenditures:	$10,979,552
Certified Tax Credit Award:	$2,560,951

SOUTHWEST REGION

Projects:	0
Projected Total FL Wages:	0
Positions Created (Projected):	0
Estimated Room Nights:	0
Qualified Florida Expenditures:	0
Certified Tax Credit Award:	0

FY 2011 - 2012 ENTERTAINMENT INDUSTRY FINANCIAL INCENTIVE VERIFIED AND WRAPPED PROJECTS - REGIONAL BREAKOUT

SOUTHEAST EAST REGION

Projects:	96
Projected Total FL Wages:	$215,972,294
Positions Created (Projected):	57,093
Estimated Room Nights:	60,988
Qualified Florida Expenditures:	$406,210,869
Certified Tax Credit Award:	$82,964,588

AFCI
ASSOCIATION OF FILM COMMISSIONERS INTERNATIONAL

PRODUCTION REVENUE TRACKING GUIDELINES
Direct Spending For On-Location Production - US Dollars

Determining the direct location spending a film or media project brings to an area is an important task. In a perfect world, a commission can ask the producer or production accountant on a project to arrive at an accurate assessment of the actual dollars spent in a given area using the AFCI. However, this information is not always available.

In the event actual reports cannot be secured, the formulas listed here have been recognized by AFCI members from North American film commissions as reasonable guides for calculating the production spending of certain projects. These formulas are based on an analysis of studio & TV network accounting records, independent producers/production managers, commercial production companies, exit reports submitted to film commissions, and generally accepted estimates from film commissioners.

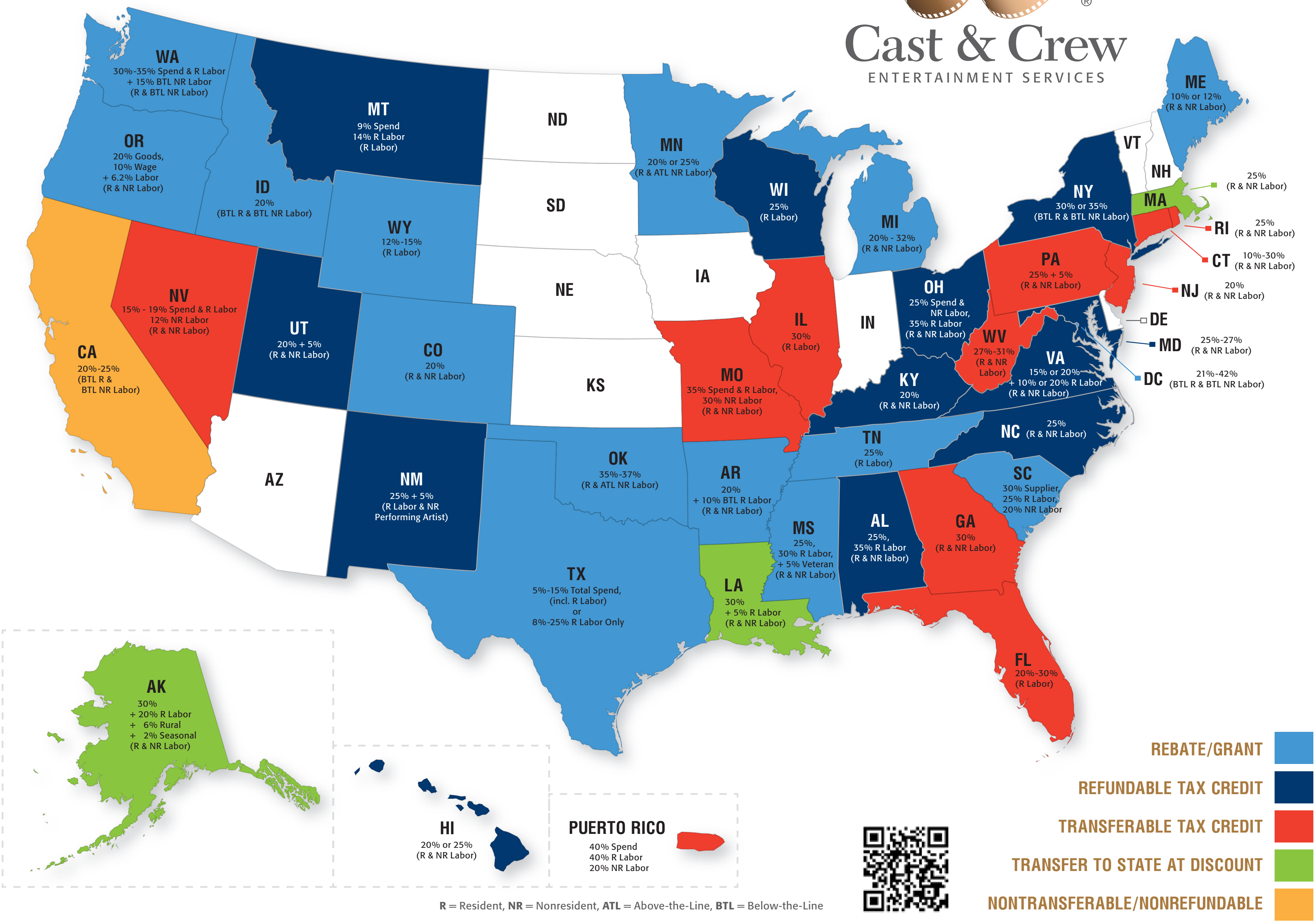
Outside North America, many cities, regions, and nations may have different results, and are encouraged to use this system as a basis for the development of their own unique tracking systems. As with any formula, common sense and prevailing history should be applied. By careful tracking of reports from AFCI members using this system, the Task Force will periodically refine the formulas to increase the accuracy and flexibility for all jurisdictions.

	LOW BUDGET Minimal Crew	**MEDIUM BUDGET Full Crew, Union Scale**	**HIGH BUDGET Full Crew, Union Scale**
Type of Production			
Feature Film		$125,000/day	$260,000/day (including stage work)
Feature Film (Independent)	$30,000/day	$50,000/day	$110,000/day
TV Weekly Series (Network TV)		$165,000/day	$300,000/day (including stage work)
TV Movie	$35,000/day	$75,000/day	$125,000/day
TV Special	$35,000/day	$60,000/day	$100,000/day
Commercial	$25,000/day	$100,000/day	$150,000/day
Music Video	$30,000/day	$65,000/day	$110,000/day
Corporate/ Industrial	$15,000/day	$25,000/day	$45,000/day
Documentary	$15,000/day	$25,000/day	$35,000/day
Still Photography	$15,000/day	$25,000/day	$35,000/day
Reality	$7,500/day	$25,000/day	$60,000/day
* All Others	$15,000/day	$25,000/day	$35,000/day
* All Others: 2nd Unit, Travel, Educational, Satellite, Foreign Broadcasts, Sports, Exercise, etc.			

(Revised February 2007)

U.S. PRODUCTION INCENTIVES AT-A-GLANCE

JUNE 2013



R = Resident, **NR** = Nonresident, **ATL** = Above-the-Line, **BTL** = Below-the-Line

Cast & Crew®
ENTERTAINMENT SERVICES

STATE	INCENTIVE	TYPE OF INCENTIVE	PER PROJECT CAP	STATE ANNUAL CAP	QUALIFIED LABOR	SUNSET DATE
Alabama	25% Spend & NR Labor 35% Resident Labor	Refundable Tax Credit	No Cap*	$15M FYE 9/30/2013 $15M FYE 9/30/2014	Each Resident & Nonresident*	NA
Alaska	30%, +20% Res Labor, +6% Rural, +2% Season	Refundable* Tax Credit	No Cap	$200M Thru 6/30/2023	Each Resident & Nonresident	6/30/23*
Arkansas	20% +10% BTL Resident Labor	Rebate	No Cap	No Cap	1st $500k of Each Resident & Nonresident Subject to Tax	6/30/19
California	20% or 25%*	Nontransferable* Tax Credit	No Cap	$100M Per Fiscal Year (7/1 – 6/30)	Each BTL Resident & BTL Nonresident	6/30/17
Colorado	20%	Rebate	No Cap	$1M FYE 6/30/2014	1st $1M of Each Resident & Nonresident	NA
Connecticut	10%, 15%, 30%*	Transferable* Tax Credit	No Cap	No Cap	Each Resident & Nonresident*	NA
District of Columbia	21%, 30%, 42%*	Rebate	No Cap	Program Is Not Currently Funded	Each BTL Resident & BTL Nonresident	NA
Florida	20% - 30%	Transferable Tax Credit	$8M Film, $500k Comm/Music	$296M Thru 6/30/2016	1st $400k of Each Resident	6/30/16
Georgia	20% +10% Promo*	Transferable Tax Credit	No Cap	No Cap	1st $500k of Each Resident & Nonresident with W-2*	NA
Hawaii	20% or 25%*	Refundable Tax Credit	$15M	No Cap	Each Resident & Nonresident Subject to HI Tax	12/31/18
Idaho	20%	Rebate	$500k	$1M*	Each BTL Resident & BTL Nonresident	6/30/14
Illinois	30% +15% Resident*	Transferable Tax Credit	No Cap	No Cap	1st $100k of Each Resident	5/6/21
Kentucky	20%	Refundable Tax Credit	No Cap	No Cap	All BTL & 1st $100k of Each ATL	12/31/14
Louisiana	30% +5% Resident Labor*	Refundable* Tax Credit	No Cap	No Cap	Each Resident & Nonresident	NA
Maine	10% or 12% Wage* 5% Spend	Rebate Tax Credit	No Cap No Cap	No Cap No Cap	1st $50k of Each Resident & Nonresident NA	NA
Maryland	25% or 27%*	Refundable Tax Credit	No Cap	$ 25M FYE 6/30/2014 $7.5M FYE 6/30/2015	Each Resident & Nonresident Earning ≤ $500k	6/30/16
Massachusetts	25% Spend 25% Payroll	Refundable* Tax Credit	No Cap	No Cap	Each Resident & Nonresident*	12/31/22
Michigan	27% Spend* & NR ATL, 32% Res Labor*, 20% NR BTL	Rebate	No Cap	$50M FYE 9/30/2013 $50M FYE 9/30/2014	1st $2M of Each Resident & Nonresident	9/30/17
Minnesota	Up to 20%* Up to 25%*	Rebate	No Cap	$10M*	Each Resident & ATL Nonresident*	NA
Mississippi	25% Local Spend & NR Labor, 30% Res Labor, + 5% Veteran*	Rebate	$10M	$20M Per Fiscal Year (7/1 – 6/30)	1st $5M of Each Resident & Nonresident Subject to W/H	6/30/16*
Missouri	35% Local Spend & Res Labor 30% Nonresident Labor*	Transferable Tax Credit	No Cap	$4.5M Per Calendar Year	Each Resident & Nonresident Earning ≤ $1M	11/28/13
Montana	9% Spend, 14% Res Labor Up to 25%	Refundable Tax Credit* Grant	No Cap No Cap	No Cap $1M*	1st $50k of Each Resident *	12/31/14 NA
Nevada	15% - 19% Spend & Res Labor* 12% NR Labor	Transferable Tax Credit	$6M	$20M Per Fiscal Year (7/1 – 6/30)	1st $750k of Each Resident & Nonresident	6/30/23
New Jersey	20%	Transferable Tax Credit	No Cap	$10M per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Subject to Tax	6/30/15
New Mexico	25% + 5%	Refundable* Tax Credit	No Cap*	$50M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Performing Artist*	NA
New York	30% or 35%	Refundable Tax Credit	No Cap	$420M Per Calendar Year	Each BTL Resident & BTL Nonresident	12/31/19
North Carolina	25%	Refundable Tax Credit	$20M*	No Cap	1st $1M of Each Resident & Nonresident	12/31/14
Ohio	25% Local Spend & NR Labor, 35% Resident Labor	Refundable Tax Credit	$5M	$40M For Biennium Ending 6/30/2015	Each Resident & Nonresident	NA
Oklahoma	35% +2%*	Rebate	No Cap	$5M Per Fiscal Year (7/1 – 6/30)	Each Resident & ATL Nonresident*	6/30/14
Oregon	20% Goods*, 10% Wage +6.2% Labor	Rebate	No Cap	$6M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Earning < $1M*	12/31/17
Pennsylvania	25% +5%*	Transferable Tax Credit	20% of the Annual Cap	$60M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Subject to W/H*	NA
Puerto Rico	40% Spend & Res Labor 20% Nonresident Labor	Transferable Tax Credit	No Cap No Cap	$50M Per Fiscal Year* No Cap	Each Resident Each Nonresident	6/30/18
Rhode Island	25%	Transferable Tax Credit	$5M*	$15M Per Calendar Year	Each Resident & Nonresident	6/30/19
South Carolina	30% Supplier, 25% Res Labor, 20% NR Labor	Rebate	No Cap	Yes* Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Earning < $1M	NA
Tennessee	25%	Grant	No Cap	$2.3M	Each Resident	NA
Texas	5% - 15% Spend Incl. Res Labor OR 8% - 25% Res Labor Only, +2.5% or 4.25%*	Grant	No Cap	$95M For Biennium Ending 8/31/2015	1st $1M of Each Resident	NA
Utah	20% + 5%	Refundable Tax Credit	No Cap	$6.79M per Fiscal Year	Each Resident & Nonresident*	NA*
Virginia	15% or 20%* + 10% or 20% Res Labor* Discretionary*	Refundable Tax Credit Grant	At the Discretion of the Film Office	$5M For Biennium Ending 6/30/2014 $6M For Biennium	1st $1M of Each Resident & Nonresident	NA NA
Washington	Up to 30% or 35%* Up to 15% BTL NR Labor*	Rebate	No Cap	$3.5M Per Calendar Year	Each Resident & BTL Nonresident*	6/30/17
West Virginia	27% +4%*	Transferable Tax Credit	No Cap	$5M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Subject to Tax	NA
Wisconsin	25%	Refundable Tax Credit	$100k*	$500k Per Fiscal Year (7/1 – 6/30)	Each Resident Earning Less Than $250k	NA
Wyoming	12% - 15%	Rebate	No Cap	$900k For Biennium Ending 6/30/2014	Each Resident	6/30/16

*Please visit our website at www.castandcrew.com for details and up-to-date information. These materials have been prepared as of June 15, 2013 by Cast & Crew Entertainment Services for informational purposes only and should not be construed as tax advice or relied on for specific production projects.

Senate Commerce & Tourism Committee

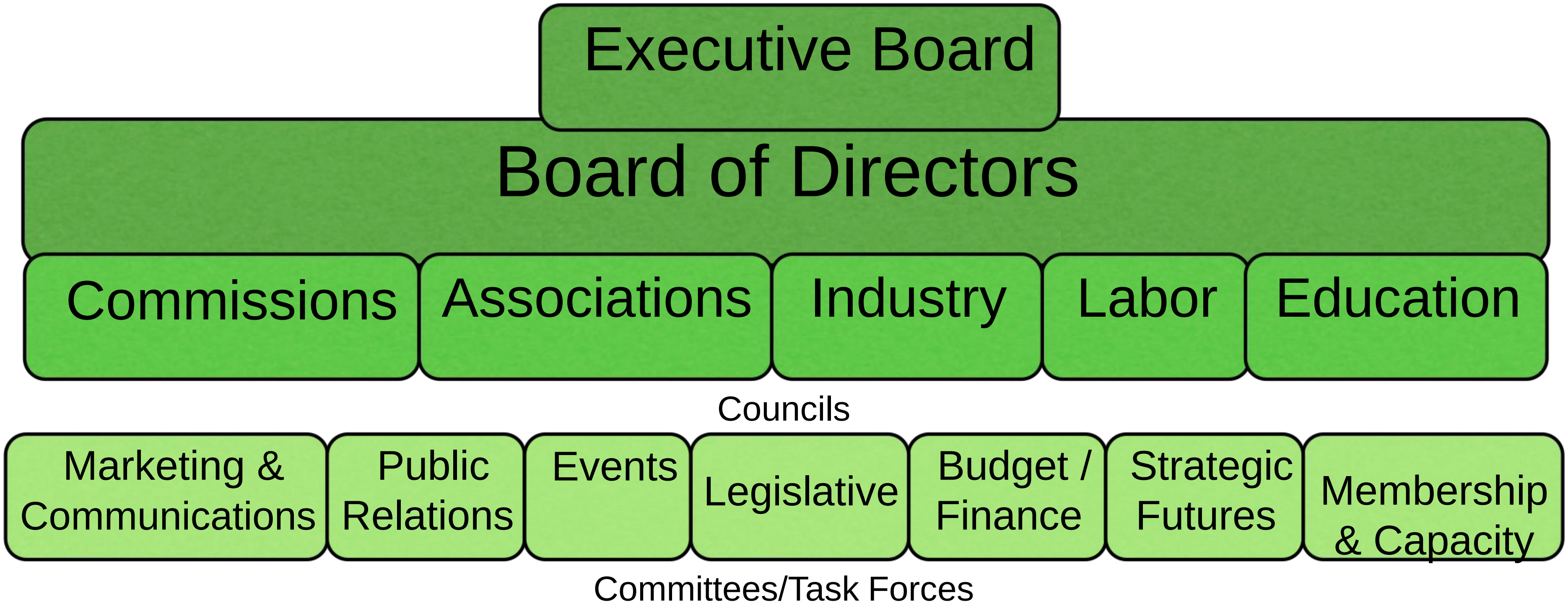
October 7, 2013

Film Florida

www.filmflorida.org

Film Florida provides consistent, diverse leadership for Florida's entertainment production industries.

Film Florida Organizational Chart



What is Film Florida?

Film Florida is a not-for-profit corporation that provides a leadership role in Florida's film and entertainment industries by representing a coalition of interests, including private industry, local film commissions, industry associations, educational institutions and labor organizations.

Its purpose is to offer to businesses and individuals the benefits of a statewide trade association to promote the creation of jobs in the film and entertainment production industries and to promote economic development and tourism.

Film Florida meets quarterly to discuss topics and issues of concern to us all, and then moves forward with a plan of action to help achieve our goals. We are very closely connected with the Governor's Office of Film and Entertainment.

Who is Film Florida?

Charlotte Harbor Florida Film Office
HYATT REGENCY CLEARWATER BEACH RESORT AND SPA
TEAMSTERS LOCAL 769
FILMIAMI.ORG
THE CITY OF MIAMI DADE CO. FLORIDA
MAYOR'S OFFICE OF FILM & CULTURAL AFFAIRS
SARASOTA COUNTY FILM & ENTERTAINMENT OFFICE
PARADISE COAST
IOA INSURANCE OFFICE OF AMERICA
TDA TALENT DIRECT AGENCY
EHRENSTEIN CHARBONNEAU CALDERIN Attorneys at Law
Visit Central Florida.org
FILM MATTERS
LEVEL TALENT GROUP
WIFT FLORIDA
Tampa Hillsborough
MIAMI INTERNATIONAL FILM FESTIVAL Miami Dade College
FULL SAIL UNIVERSITY
ULTIMATE DIVER CHALLENGE
ProductionHUB.com
Bradenton Area Convention and Visitors Bureau BACVB.com
Florida Film Production Coalition
ease
MIAMIBEACH
space coast FILM COMMISSION
EA SPORTS
Hilton Cocoa Beach Oceanfront
AICP FLORIDA
MORGANS HOTEL GROUP
Miami Dade College
filmflorida.com
TELEMUNDO
FILM AND TELEVISION COMMISSION
OCEAN DRIVE association
ARRI CSC
EMERALD COAST
DOUBLETREE BY HILTON GRAND HOTEL BISCAYNE BAY
Visit PENSACOLA Pensacola Beach • Perdido Key
PINK SNEAKERS
G-Force Protective Services
PARRON LAW Attorneys & Counselors Entertainment • Media • Sports
CAMACOL
SAG-AFTRA ONE UNION
FLORIDA KEYS & KEY WEST F-I-L-M COMMISSION
Pasco County Florida It's only natural.
COMCAST NBCUNIVERSAL
filmorlando
UNIVERSAL STUDIOS FLORIDA PRODUCTION GROUP
JACKSONVILLE Film & Television
FOX
FILM COMMISSION
CLEARWATER MARINE AQUARIUM
SAFO
giff GASPARILLA INTERNATIONAL FILM FESTIVAL 2012
i·d·e·a·s
SHOOT COLLECTIVE
MOVING PICTURE ELECTRONIC SERVICES
LYNN UNIVERSITY
bahamas
G Star School of the Arts
sunny.org/film greater FORT LAUDERDALE
FMPTA
FX

Statewide Regional Events

WEST FLORIDA REGIONAL SUMMIT

An Update: The State of Florida's Entertainment Industry and Film-Induced Tourism

Clearwater - Thursday, August 1, 2013

SOUTH FLORIDA REGIONAL WORKSHOP/FORUM

The Economic Impact of Film, TV and Commercial Production

Miami - Tuesday, August 6, 2013

CENTRAL FLORIDA REGIONAL WORKSHOP/FORUM

A Convergence of Traditional Film & Television & Digital Media Production

Orlando - Friday, August 23, 2013

NORTHEAST FLORIDA REGIONAL WORKSHOP/FORUM

Encouraging Film & Entertainment Production in Underutilized Regions

Jacksonville - September 10, 2013

NORTHWEST/TALLAHASSEE FLORIDA REGIONAL MEETING

Recap - Short & Long-Term Growth Strategies for Cultivating and Growing Florida's Entertainment Production Industry

Tallahassee – State Capitol Building – 4th Qtr. 2013

The Film & Entertainment Industry Strategic Plan (2013-18)

Florida will have the nation's top performing economy and be recognized as the world's best place to live, learn, play, work and do business.

To achieve this bold vision for Florida's film & entertainment industry, the following concerns will need to be addressed:

Today's Challenges	Tomorrow's Opportunities
Lack of a unified vision for Florida's film & entertainment industry.	Alignment of industry stakeholders around a consensus-backed five-year strategic plan.
Lack of consistency in tax credit and incentive program, and increased competition from other states and countries.	Consider revisions to the current incentive programs to increase competitiveness and maximize the return on investment and benefits to the state.
Short-term nature of projects.	Establish a permanent infrastructure to attract and retain long-term productions.
Workforce graduating from Florida's educational institutions and leaving the state to work in competing states	Establish a permanent and successful industry in Florida to encourage the retention of the graduating workforce.

*"These strategies pave the way for **business-led**, agency-supported improvement of collaboration among currently fragmented stakeholders"* - OFE 5-Year Strategic Plan for Economic Development 2013-2018

Challenge: Lack of a unified vision for Florida's film and entertainment industry.

Opportunity: Alignment of industry stakeholders around a consensus-backed five year strategic plan.

- Strong industry leadership was discussed as the most necessary component of unification and alignment.
- The short-term nature of Florida's current public policy towards growing the industry was thought to be the leading factor causing industry factions to focus on competing for their survival, instead of planning for their future.
- Reorganization of the state's industry support into a public-private partnership (i.e. VISIT FLORIDA or Enterprise Florida) was thought to be the most beneficial.

Challenge: Short-term nature of projects

Opportunity: Establish a permanent infrastructure to attract and retain long-term productions

- A project based incentive with consistency will bring investment and infrastructure development

“In the last three years, 11 new studios have made announcements to move to or expand in Georgia. EUE/Screen Gems, which signed a 50-year lease with the city for its complex located on the former home of the Lakewood Fairgrounds, has invested tens of millions of dollars, and is expected to add additional sound stages in the coming years. Jacoby Enterprises, the firm that turned a shuttered steel mill into Atlantic Station, has announced plans to build a 100-acre soundstage facility off I-85 in Gwinnett County. To much excitement earlier this year, Pinewood Studios, the British studio best known for filming the James Bond series and which stands equipped to handle big-budget productions, signed on to bring a 288-acre facility to Fayette County.

"The reason why this is important in Georgia's growth is none of our other competing states, certainly in the Southeast, are developing infrastructure, solid brick-and-mortar infrastructure, at the pace we are," says Ric Reitz, actor, filmmaker, and former president of the Georgia Production Partnership, a media advocacy group, who helped state lawmakers author the film tax credit legislation.

- Creative Village project in Orlando

- Interest in building sound stage infrastructure in Miami Dade

Challenge: Workforce graduating from Florida's educational institutions and leaving the state to work in competing states.

Opportunity: Establish a permanent and successful industry in Florida to encourage the retention of the graduating workforce

- Develop stronger relationships between educational facilities, companies, industry leaders and investors to create better opportunities for recent graduates.

- Expand access to Florida-based private capital and develop “angel” investor networks to fund projects - this will create more opportunity for developing workforce.

- Lure professionals with Florida ties back here to work and build their own projects/companies - this will create more jobs for developing workforce.

Challenge: Lack of consistency in tax credit program, and increased competition from other states and countries.

Opportunity: Consider revisions to the current incentive programs to increase competitiveness and maximize the return on investment and benefits to the state

- In the current business environment, consistency, long-term commitment and adequate funding for the program are a must.
- The incentive program is the foundation upon which we can continue to build our existing industry assets throughout our state.
- The program is fiscally conservative and responsible - there are some minor tweaks that can be made, but it is well structured to serve the diverse needs of the various industry sectors it represents throughout the entire state.

West Florida

The State of Florida's Entertainment Industry and Film-Induced Tourism

"Film-induced tourism" is defined as "a tourist visit(ing) a destination or an attraction as a result of the destination being featured on television, video, DVD, or the cinema screen."

"Our research shows that when considering tourists to the St. Petersburg/Clearwater area, the **Dolphin Tale** movie is the driver of approximately 72.7% of visitors to CMA. The model forecasts approximately eight hundred thousand visitors in 2013, growing to 2.3 million in 2016. These visitors will provide a total economic impact to the local economy of approximately $580 million in 2013, which increases to $1.7 billion in 2016." - USFSP/CMA, <u>The Economic Impact of Dolphin Tale on the St. Petersburg/Clearwater local economy</u> (2012)

•The entertainment production industry is like a tourist on steroids - they come, spend a HUGE AMOUNT of money, and leave. And more come after them, just like tourists.

•Shows that portray Florida are literally free advertising for the state around the world.

South Florida

The Economic Impact of Film, TV and Commercial Production

Tremendous economic impact

“...approximately $150 million in total Florida spending over a seven year period, approximately 25,000 jobs were created in seven years, approximately 18,000 hotel rooms were occupied during that time. And that's one show.” - ***Terry Miller, Producer***

“...this was just one year, hotel rooms, $461,000; transportation, trucks and vehicles, $1,000,000; car rental $54,000; gasoline $310,000; local wardrobe $395,000; catering, $1,037,000; electric rentals, $2,586,000; local office personnel, $1,000,000; office facility, $275,000 -- we got a great deal. Location fees to private rentals, private homes and so forth, $1,295,000 and on and on; crew $14,255,000; off duty police and fire, $230,000; local security, $381,000; extras, $426,000; local cast $6,000,000; permit fees $8,000.” - ***Terry Miller, Producer***

Huge marketing value and capacity to grow infrastructure

“The Greater Miami Convention and Visitors Bureau estimated the commercial value of television productions in 2011 and 2012 and concluded...that the exposure value in terms of ads...to promote Miami as a destination...and the economic impact in terms of the units is $8.2 million....that's the value you're getting for just one project...” - ***Juan Delgado, Telemundo***

“We've converted 475,000 square feet of warehouse space that's been converted to offices and production studios. And those are active working day-to-day studios in south Florida.” - ***Juan Delgado, Telemundo***

“Florida is one of the top for production domestic locations for commercial shooting, but prior to the credit here in Florida it only represented about two percent of the domestic market share. Since the incentive has been passed the community has almost doubled and now represents four percent of the national market share.” - ***David Phelps, Association of Independent Commercial Producers***

“If you offer an incentive for just one year you may get a few productions to come in and it may benefit the state marginally, but what really, really sets the tone for where commercial producers go is knowing they're going to have an incentive there for five years.” - ***David Phelps, Association of Independent Commercial Producers***

South Florida

The Economic Impact of Film, TV and Commercial Production

There is an exceptional pool of developing workforce

“There are accredited institutions, 34 schools throughout the state turning out somewhere in the field of nine hundred students a year with associate's, bachelor's or master's degrees in the field.” - ***Barry Gordon, Miami Dade College***

Significant benefits extend to the Tourism & Hospitality sector

“Last year we had a record number of visitors again drawn to a large extent because of the amazing media impressions that film and production broadcast not just throughout the United States but throughout the globe...Economic impact, $22 billion...that sustains a lot of jobs.” - ***Rolando Aedo, Greater Miami Convention and Visitors Bureau***

“At the risk of being a little bit melodramatic, tourism, the most recent success would not exist if it weren't for the film industry. I say it, I believe it.” - ***Rolando Aedo, Greater Miami Convention and Visitors Bureau***

With a consistent, funded program - there will be investment in infrastructure

“We've got several people that are just interested in building a full blown production studio in Miami-Dade County, something we're very excited about, it does a lot of things, it guarantees that the work all stays here, it guarantees that our highly trained staff has constant work.” - ***Jack Osetrholt, Miami Dade County Vice Mayor***

The program is generally well structured and well regarded nationwide

“And I think that one of the things that we found important to maintain in this program is a first come first serve basis. And they have obviously if you're first in line you get that funding first and as funds become available on the back end those people in queue will move up. And I think that when we look at states that have kind of a pick and choose process that really doesn't seem to work as well because it takes out the certainty of that program and it doesn't give you the continuity. And when our members are looking for a place to go film they really want the certainty, they want the continuity and most of all the funding is critical.” - ***Angela Miele, Motion Picture Association of America***

Central Florida

A Convergence of Traditional Film & Television & Digital Media Production

Measuring the benefit to the public

"...it's critical to show return on investment. And that includes not just return on investment with the tax base, but actually return to GDP. Return to the overall economy. I know the industry cares a lot about that, and at DEO we think that is a good measure as well, looking at overall economic impact and not just tax basis." - ***Jesse Panuccio, Director Florida Department of Economic Opportunity***

"...return on investment, sustainability, and then tweaks or adjustments to how we operate an actual program I think are the critical questions for this crowd to be addressing over the course of this conference and others like it." - ***Jesse Panuccio, Director Florida Department of Economic Opportunity***

The more crew and infrastructure you have - the less you need an incentive...but right now States do need something to compete

"...and I will tell you, if you don't have an incentive, you are not even on the map. Even California and New York realized that, without an incentive, they were going to lose the industry. It's just become a way of doing business...But I will tell you that it's a balance. The more crew, local crew you have, the more infrastructure you have, the less of an incentive you have to have." - ***Mary Ann Hughes, Disney Studios***

"...until there is funding to the program, we won't be looking at Florida. And I'm sorry to say that, but, you know, I'm the advisor to our business units, and you are not on the map right now for us." - ***Mary Ann Hughes, Disney Studios***

"If you don't get funding this next year, you are going to see everything drop off the cliff. It will be a free fall...our CFO told us we're not even allowed to look at jurisdictions that don't have an incentive. He considers that we are being fiscally irresponsible if we go to locations that don't have an incentive." - ***Mary Ann Hughes, Disney Studios***

Central Florida

A Convergence of Traditional Film & Television & Digital Media Production

Clustering and cross-pollination is starting to occur between industry segments

"...a lot of people think that video games or interactive entertainment or digital media is all about software engineering, computer programming. The reality is that we employ script writers, we employ sound engineers, we employ lighting engineers; a lot of the same functions that you find in traditional film, television, and commercial development." - ***Craig Hagen, EA Sports***

"Florida has created the pipeline for us to be able to find the qualified, high-skill employees that we need to have in order to make the best-selling video games in the world." - ***Craig Hagen, EA Sports***

Cultivating a "Creative Economy" will spurn economic development and growth

"...the Creative Villages is 60 acres in downtown Orlando where the old arena used to be. It is earmarked by the city and the city counsel that it's going to be built in a way that it supports film and digital media. So we have a university down there working already. And we have not only our university, the University of Central Florida, the University of Florida's graduate architectural program has studios in there. We are working with Valencia College and their film program in there. And across the street, soon to be, will be about a million or 2 million -- about a million nine and a half square feet of office space, green space, residential space, and an area that's built for these type of people." - ***Ben Noles, Florida Interactive Entertainment Academy***

There are also major benefits to other unrelated industry sectors

"The modeling simulation and training industry in Florida is absolutely critical to our economy. We are the nation's center, epicenter for modeling simulation and training. There are over 100 companies doing that work in Florida...So supporting the digital media and the model simulation and training industries are absolutely critical." - ***Casey Barnes, Metro Orlando Economic Development***

Northeast Florida

Encouraging Film & Entertainment Production in Underutilized Regions

- Expanding the under-utilized region bonus would help many of the communities throughout the State who have invested significant local resources to build the industry in their area, but do not have the same amount of natural resources as the traditional "production centers".

- Opportunities may exist to use the Georgia incentive to bring production to the northeast regions of the State and the Panhandle.

- The region could be poised to dominate micro-budget production.

A few key points...

- Long-term commitment to the program in the form of additional years is fundamentally necessary;
- Adequate funding for the remaining fiscal years of program and beyond will encourage more long-term investment and growth in local communities throughout the State;
- Adequate funding and support for the Florida Office of Film & Entertainment will insure that the State can continue to protect the public's investment in the industry by properly overseeing and administering this highly successful economic development/job creation tool.
- There is desire to create a public-private partnership organization for the industry 1.) to provide consistent leadership for the industry 2.) to focus and work on the opportunities identified in the 5-year plan and 3.) to protect the public investment in the industry by insuring its continued viability and success 4.) to develop a collaborative, comprehensive and educational marketing strategy (in-State, nationwide and internationally) including all sectors of the industry.

Thank You!

...for your time and continued commitment to our state.

www.filmflorida.org

Florida Tourism Industry by the numbers

Will Seccombe

President & CEO, VISIT FLORIDA

VISIT FLORIDA
2012-2016 Strategic Plan

Mission

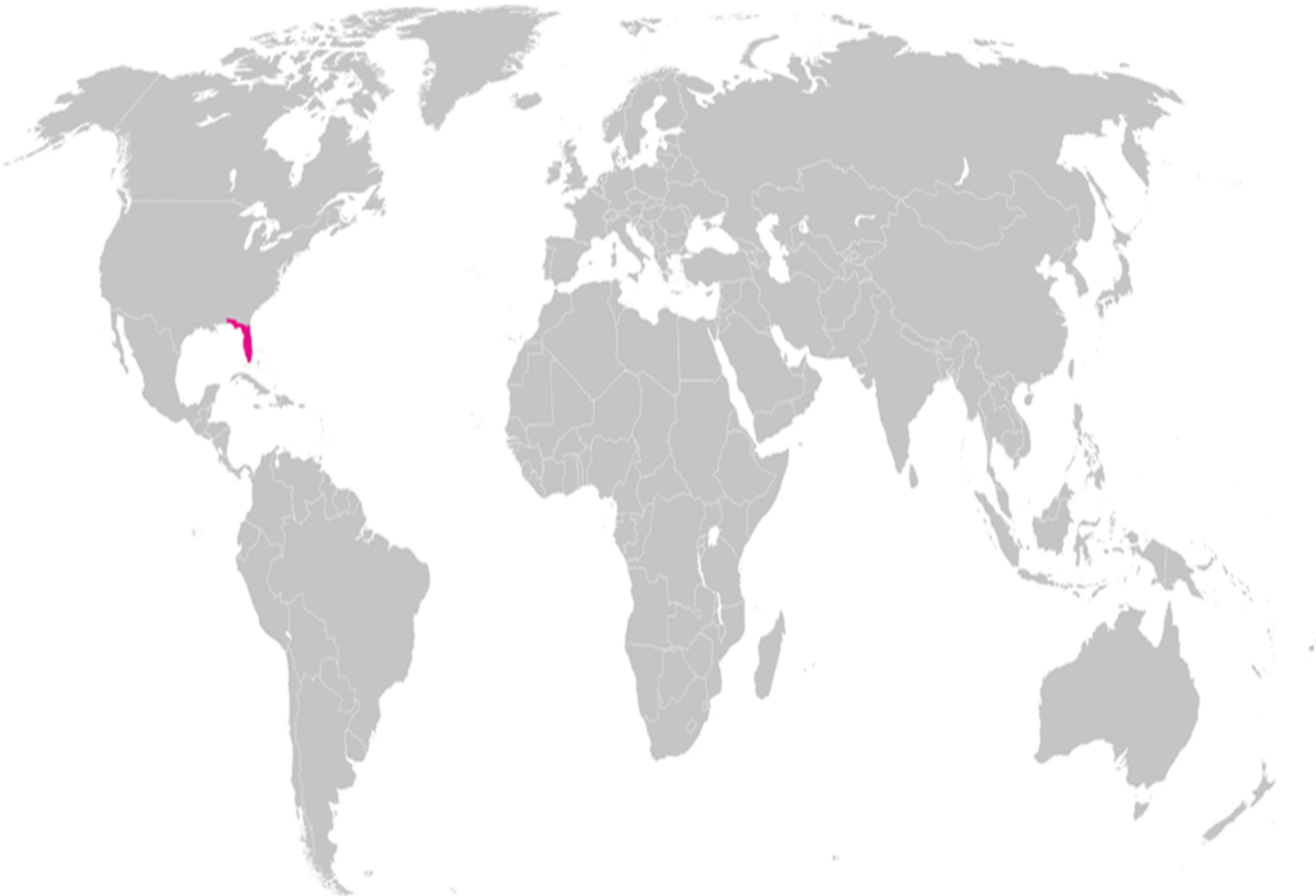
To promote travel and drive visitation to and within Florida

Vision

VISIT FLORIDA establishes Florida as the No. 1 travel destination in the world

Purpose

To brighten the lives of all



Florida Tourism Has Momentum

- Tourism-related employment has seen **40** consecutive months of job growth

- **Two** consecutive years of record visitation
  - **91.5** million visitors in 2012
  - **87.3** million visitors in 2011

- **Record** high visitation for Q1 & Q2 2013
  - **26** million visitors in Q1
  - **23** million visitors in Q2

RETURN ON INVESTMENT

For every $1 invested in tourism advertising, VISIT FLORIDA generates **$258 in tourism spending** and more than **$15 in new sales tax collections**, paid by visitors, not residents

39% of Florida visitors from domestic markets were significantly influenced by VISIT FLORIDA marketing efforts

Every **85 visitors** to the Sunshine State supports **one Florida job**

Florida tourism industry invests **$2** in marketing programs for every $1 the state of Florida invests

EXPANDED EFFORTS IN 2012/13

- **$108.6M** private contribution
- **$54M** public funding
  - – **$19.1M** public funding increase over 2011/12
    - Increased media buys of **$13.5M**
    - New VISITFLORIDA.com consumer website
    - Increased international marketing
    - Added representation in India
    - Increased funding for Air Team Florida
    - Integrated VIVA Florida marketing efforts
    - New CRM system - partnership/consumer direct marketing
    - Created Small Business Destination marketing grant program

EXPANDED EFFORTS IN 2013/14

- **$110.9M** budgeted private contribution
- **$63.5M** public funding
  - **$9.5M** public funding increase over 2012/13
    - Additional **$6.5M** in domestic marketing
      - Four major campaigns (Summer, Fall, Winter & Spring)
      - Geographic expansion
    - Additional **$2M** in International marketing
    - Additional **$750K** for Air Lift grants to increase lift to FL
    - 2020 Plan Research – **$250K**

2013/14 VISIT FLORIDA BUDGET

Marketing - $156.4M

- Advertising/Internet/Direct Marketing/Brand
- Research
- Promotions
- Public Relations

Meeting & Events - $7.8M

- Domestic
- International

Visitor Services (Welcome Centers) - $3.4M

Industry Relations & Sales - $1.7

General & Administrative - $5.1M

*Rounded

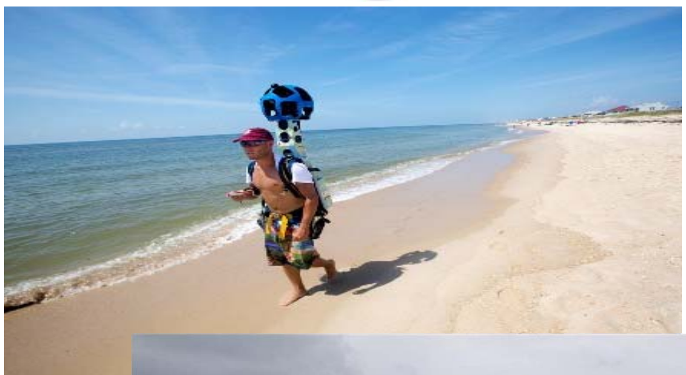
In Market Year Round

Fall Campaign | Extra Day	August - November
Winter Campaign (New Creative)	January - March
Spring Campaign (Kids are Alright)	April - June
Summer Campaign	July - August

MARKETING PARTNERSHIPS & STRATEGIC INITIATIVES

Google™

mazda®



Marketing Partnerships & Strategic initiatives

iHeartRADIO
ULTIMATE
POOL PARTY
PRESENTED BY
VISITFLORIDA.COM