



Transportation & Economic Development Appropriations Subcommittee

**Wednesday, January 23, 2013
9:00 AM - 11:00 AM
Reed Hall (102 HOB)**

ACTION PACKET

**Will Weatherford
Speaker**

**Ed Hooper
Chair**

Committee Meeting Notice
HOUSE OF REPRESENTATIVES

Transportation & Economic Development Appropriations Subcommittee

Start Date and Time: Wednesday, January 23, 2013 09:00 am
End Date and Time: Wednesday, January 23, 2013 11:00 am
Location: Reed Hall (102 HOB)
Duration: 2.00 hrs

Agency Introductions and Overviews

Department of Military Affairs
Department of Economic Opportunity
Florida Housing Finance Corporation

Economic Development Public-Private Partnerships Presentations

Enterprise Florida
VISIT Florida
Space Florida

Appearance forms can be found on myfloridahouse.gov. Please print and bring 2 copies of the form to the meeting and give them to the administrative assistant.

NOTICE FINALIZED on 01/16/2013 16:11 by MRI

COMMITTEE MEETING REPORT

Transportation & Economic Development Appropriations Subcommittee

1/23/2013 9:00:00AM

Location: Reed Hall (102 HOB)

Summary: No Bills Considered

Committee meeting was reported out: Wednesday, January 23, 2013 11:45:20AM

COMMITTEE MEETING REPORT

Transportation & Economic Development Appropriations Subcommittee

1/23/2013 9:00:00AM

Location: Reed Hall (102 HOB)

Attendance:

	<i>Present</i>	<i>Absent</i>	<i>Excused</i>
Ed Hooper (Chair)	X		
Bruce Antone			X
Frank Artiles	X		
Daniel Davis	X		
Mike Fasano	X		
Reggie Fullwood	X		
Tom Goodson	X		
Jeanette Nufiez	X		
Elizabeth Porter	X		
Lake Ray	X		
David Richardson	X		
Hazelle Rogers	X		
Victor Torres, Jr.	X		
Totals:	12	0	1

Committee meeting was reported out: Wednesday, January 23, 2013 11:45:20AM

COMMITTEE MEETING REPORT

Transportation & Economic Development Appropriations Subcommittee

1/23/2013 9:00:00AM

Location: Reed Hall (102 HOB)

Presentation/Workshop/Other Business Appearances:

DEO Presentation

Lloyd, Tony (Lobbyist) (State Employee) - Information Only
CFO, Department of Economic Opportunity
Caldwell Bldg
Tallahassee FL
Phone: (850)245-7335

DMA Presentation

Sutphin Jr., Glenn (Lobbyist) (State Employee) - Information Only
Chief of Legislative Affairs, Department of Military Affairs
Room #908 The Capitol
Tallahassee FL 32399
Phone: (850)414-9049

Enterprise Florida Presentation

Swoope, Gray - Information Only
Secretary of Commerce, Enterprise Florida
325 John Knox Road
Tallahassee Florida 32308
Phone: 850-298-6620

FHFC Presentation

Meffert, Wellington (Lobbyist) - Information Only
Florida Housing Finance Corporation
227 N Bronough St Ste 5000
Tallahassee FL 32301

Introduction

Panuccio, Jesse (Lobbyist) (State Employee) - Information Only
Executive Director, Department of Economic Opportunity
107 E Madison Street, Ste 212
Tallahassee Florida 32399
Phone: 850-245-7278

Space Florida Presentation

Kuzma, Jim - Information Only
COO, Space Florida
Cocoa Beach Florida 32931
Phone: 321-730-5301

VISIT FLORIDA President

Seccombe, Will - Information Only
President/CEO, VISIT FLORIDA
2540 W. Executive Center Cr
Tallahassee Florida 32301

Committee meeting was reported out: Wednesday, January 23, 2013 11:45:20AM

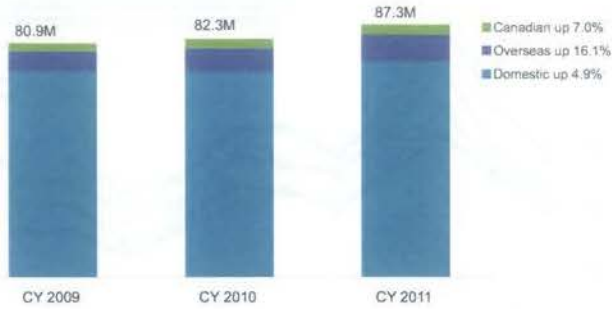
FLORIDA Tourism Indicators Dashboard

The Official Tourism Marketing Corporation for the State of Florida

VISITFLORIDA

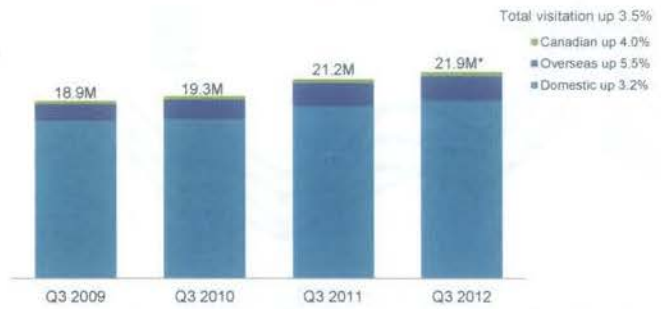
Florida Visitation: CY 2009 - CY 2011

(in millions)



Florida Visitation: Q3 2009 - Q3 2012

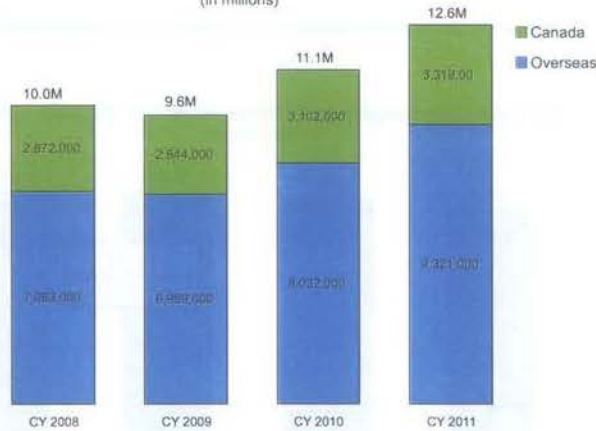
(in millions)



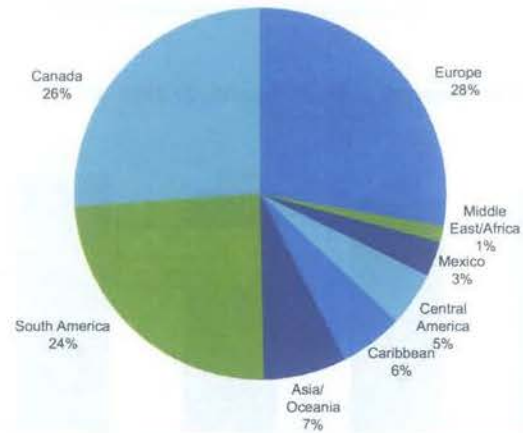
*preliminary subject to revision

International Visitation: CY 2008 - CY 2011

(in millions)



Percent of Total International Visitation by Region: CY 2011

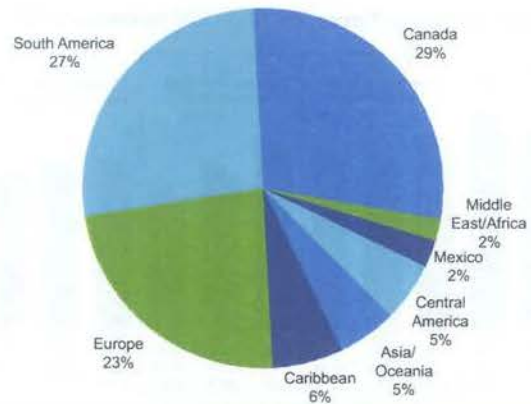


International Visitor Spending: CY 2008 - CY 2011

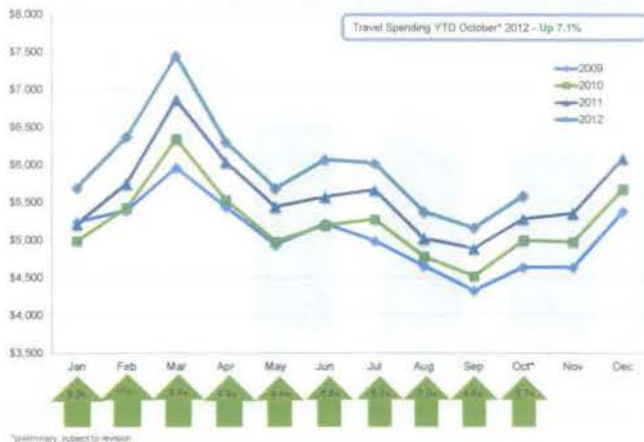
(in billions)



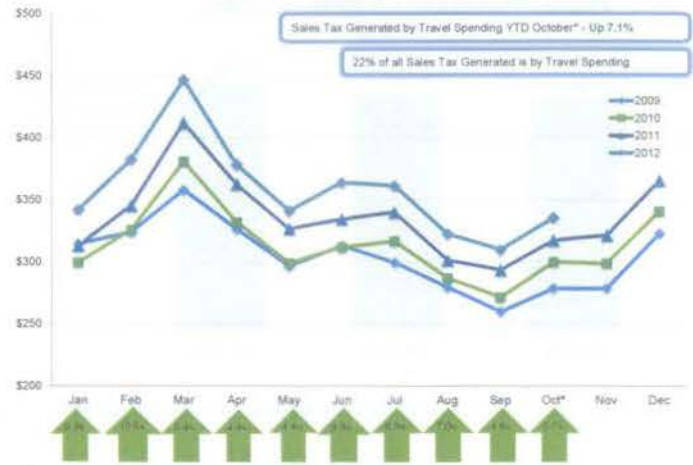
Percent of Total International Spending by Region: CY 2011



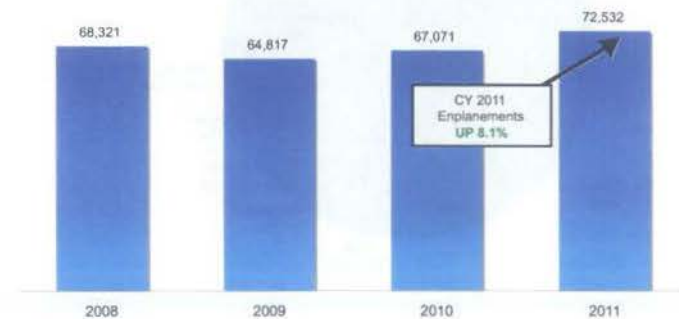
Travel Spending Generated by Month: CY 2009 - October* 2012
(in millions)



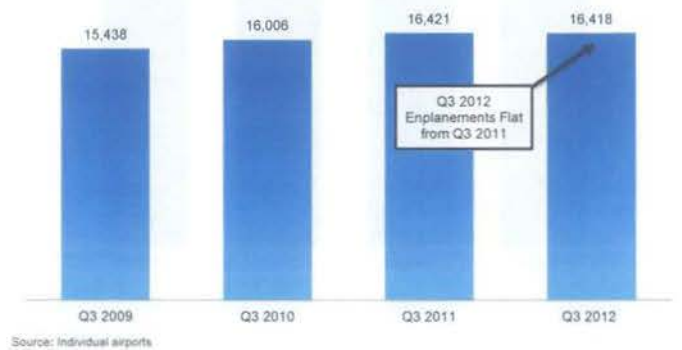
Sales Tax Generated Monthly by Travel Spending: CY 2009 - October* 2012
(in millions)



Enplaned Passengers at 14 Major Airports: CY 2009 - CY 2011
(in thousands)



Enplaned Passengers at 14 Major Airports: Q3 2009 - Q3 2012
(in thousands)



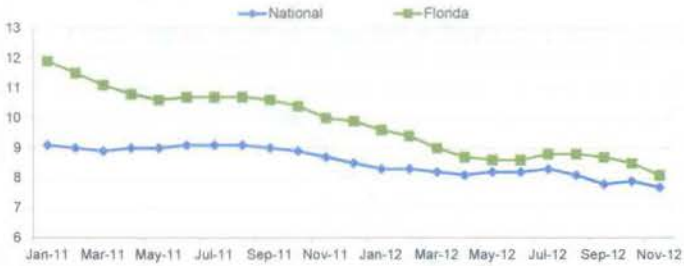
Hotel Monthly Occupancy Trends: CY 2010 - YTD November 2012



Hotel Average Daily Rate (ADR) Trends: CY 2010 - YTD November 2012



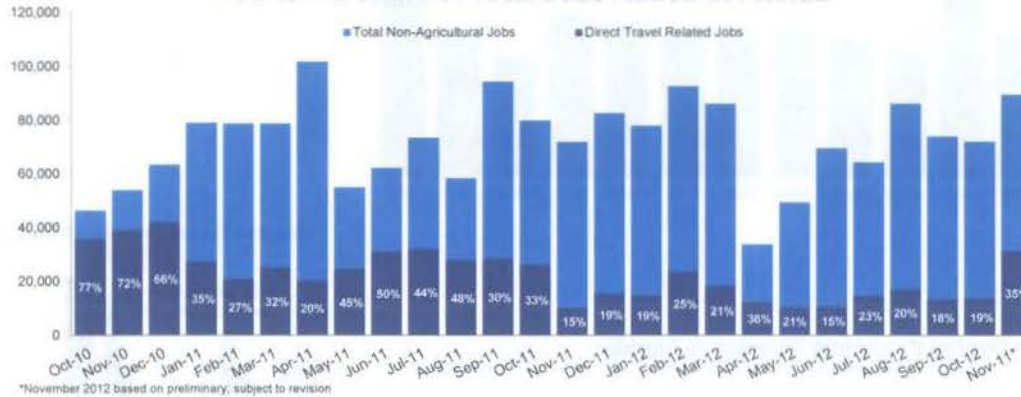
Unemployment Trends: CY 2011 - November 2012



Consumer Confidence: CY 2011 - December 2012



Tourism's Share of Total Jobs Added in Florida



Tourism Related Employment in Florida

Tourism related employment shows growth, year-over-year, for 32nd straight month.

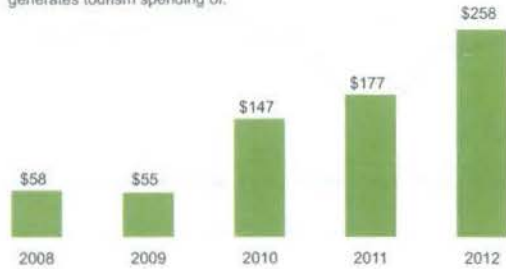


*preliminary, subject to revision
Note: year-over-year figures are an average of the individual monthly data.

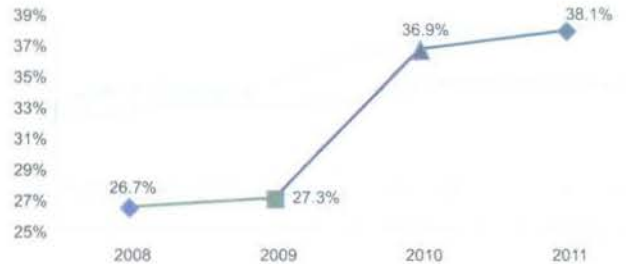
VISIT FLORIDA IMPACT

Economic Impact ROI

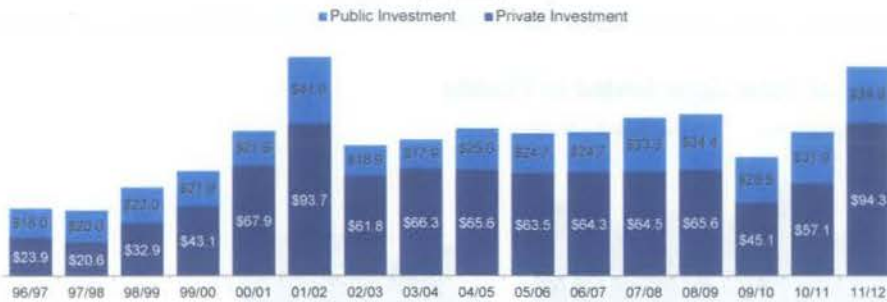
For every \$1 spent on tourism advertising, VISIT FLORIDA generates tourism spending of:



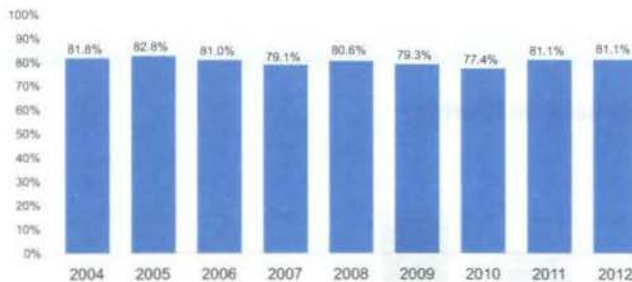
Direct VISIT FLORIDA Influencer ROI: 2008 - 2011



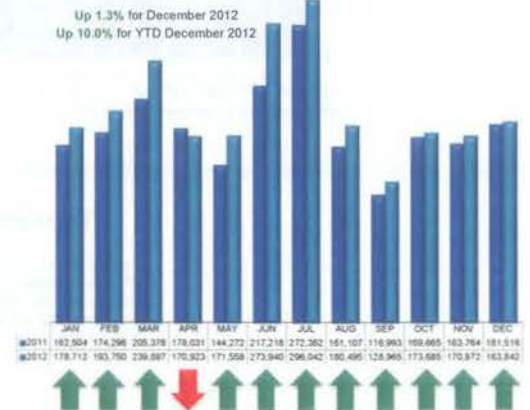
VISIT FLORIDA Total Budget: FY 1996/1997 - FY 2011/2012
(in millions)



Satisfaction Overall Promoting Tourism to Florida



Welcome Center Monthly Traffic Comparison 2012/2011



As the Sunshine State's No. 1 industry, tourism was responsible for welcoming 87.3 million visitors in 2011 who spent \$67.2 billion, generating 23 percent of the state's sales tax revenue and employing more than 1 million Floridians. For every \$1 spent on tourism marketing, VISIT FLORIDA – the state's official tourism marketing corporation – generates more than \$258 in tourism spending and \$15 in new sales tax collections, paid by visitors, not residents. VISIT FLORIDA promotes tourism to Florida through sales, advertising, promotions, public relations and visitor services programs. As a public/private partnership, VISIT FLORIDA serves nearly 12,000 tourism industry businesses, including 2,700 invested Partners, 8,900 web affiliates and major strategic alliance partnerships with Disney Destinations, Dollar Rent A Car, The Hertz Corporation, SeaWorld Parks & Entertainment and Universal Orlando. To learn more about VISIT FLORIDA, please go to www.VISITFLORIDA.org or follow our corporate blog at www.SunshineMatters.org.

THE POWER OF FLORIDA TOURISM

As one of Florida's top industries, tourism is the largest job creator and a leading driver of the state's economy. VISIT FLORIDA's vision is to make Florida the No.1 travel destination in the world.

THE FLORIDA TRAVEL MARKET

87.3 MILL. + **21.5** MILL.

Out of state and international visitors

In-state travelers

A CLOSER LOOK DOMESTICALLY SHOWS...

85% + **15.8%**

Are domestic travelers

Market share of domestic leisure visitors

Domestic travel to Florida was up 4.9%

2010

71.2 MILL.

2011

74.7 MILL.

2.3 MILL.

Travelers visited VISIT FLORIDA's five welcome centers

WHILE INTERNATIONALLY...



1 IN **5**

International visitors to the U.S. come to Florida

Every year, Florida welcomes international visitors from

174

countries

COUNTRIES WITH THE MOST ANNUAL VISITORS

Canada **3.3** MILL.

Brazil **1.5** MILL.

United Kingdom **1.3** MILL.

Mexico **387**K

Argentina **375**K

Venezuela **369**K

Germany **341**K

France **307**K

Colombia **306**K

Spain **292**K



TOURISM IMPACT ON FLORIDA'S ECONOMY

In 2011, tourism resulted in

\$67.2 BILL.

In spending

+

1+ MILL.

Jobs, 1 per every 85 visitors

24.6%
Lodgings

16.5%
Admissions



Which generated

23%

of sales tax revenues

+

\$4 BILL.

In sales tax collections



REACHING THE TARGET AUDIENCE



INVESTMENT THAT SHOWS RESULTS



SUCCESS FOR AND WITH OUR PARTNERS



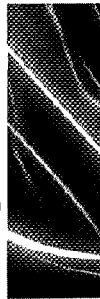
WE'RE ON OUR WAY TO BECOMING THE NO. 1 TRAVEL DESTINATION IN THE WORLD



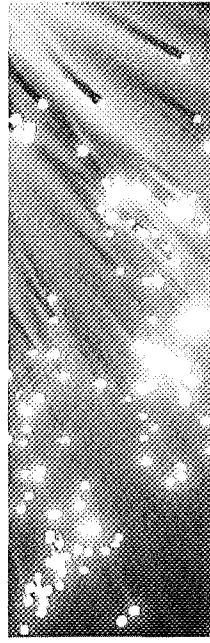
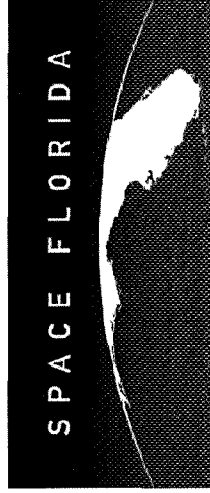
**FLORIDA HOUSE
TRANSPORTATION AND
ECONOMIC DEVELOPMENT
APPROPRIATIONS**

**Jim Kuzma, COO
Space Florida**

January 23, 2013

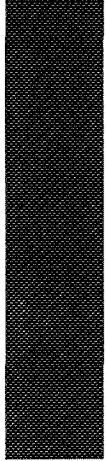


www.spaceflorida.gov

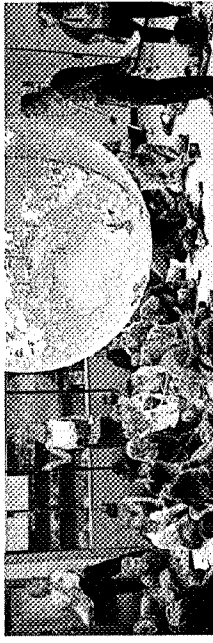
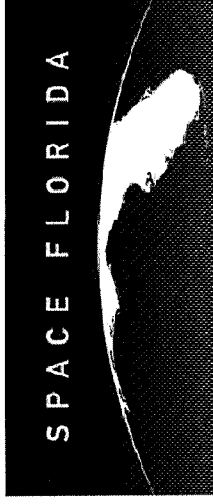


OVERVIEW TOPICS

- *About Space Florida*
- *Role in Economic Development*
- *Recent Initiatives / Achievements*
- *Legislative Requests*



Adventure Tourism

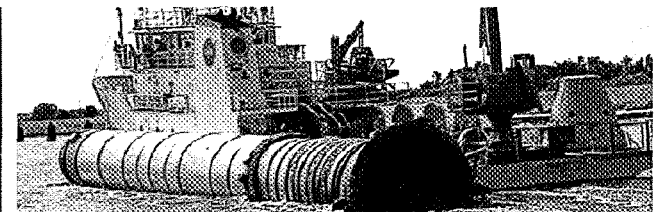
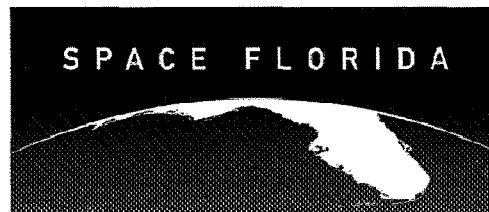


MISSION & GOALS

- ***Serve as Florida's Spaceport Authority!***
- ***Grow the Size, Diversity, Health and Robustness of the State's Space Industry***
- ***Create High-Quality, High-Wage Jobs in Florida's Space-related Industries for the economic well-being of the citizens of the state***
- ***Support Aerospace Growth and economic contribution Statewide!***



Ground and Operations
Support Systems



STRUCTURE

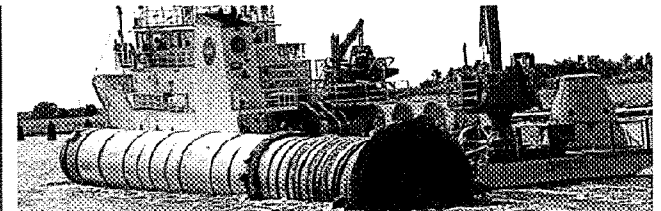
***Legislatively Chartered Public Corporation
&
Independent Special District of the State***

***Contract to Department of Economic Opportunity
... Responsible for Aerospace Industry Growth
and Spaceport Authority Functions***

***Governance through board of directors, the
Legislature and the Governor***

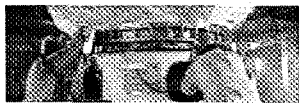


**Ground and Operations
Support Systems**



BOARD GOVERNANCE

- ***Board constructed of the 12 appointed members of the Enterprise Florida Board***
 - ***Chaired by Lieutenant Governor Carroll***
 - ***6 appointments made by Governor***
 - ***3 by Speaker of the House***
 - ***3 by President of the Senate***

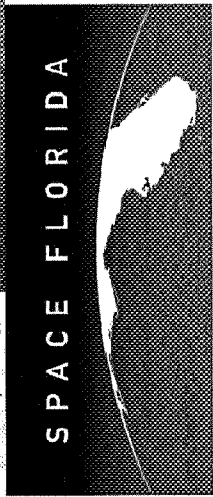
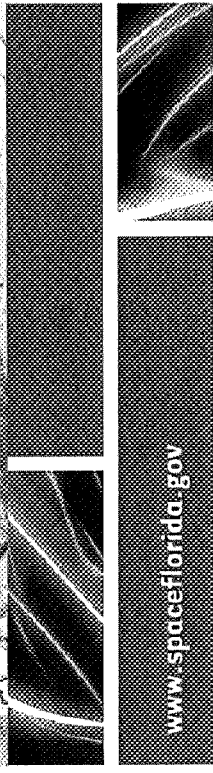
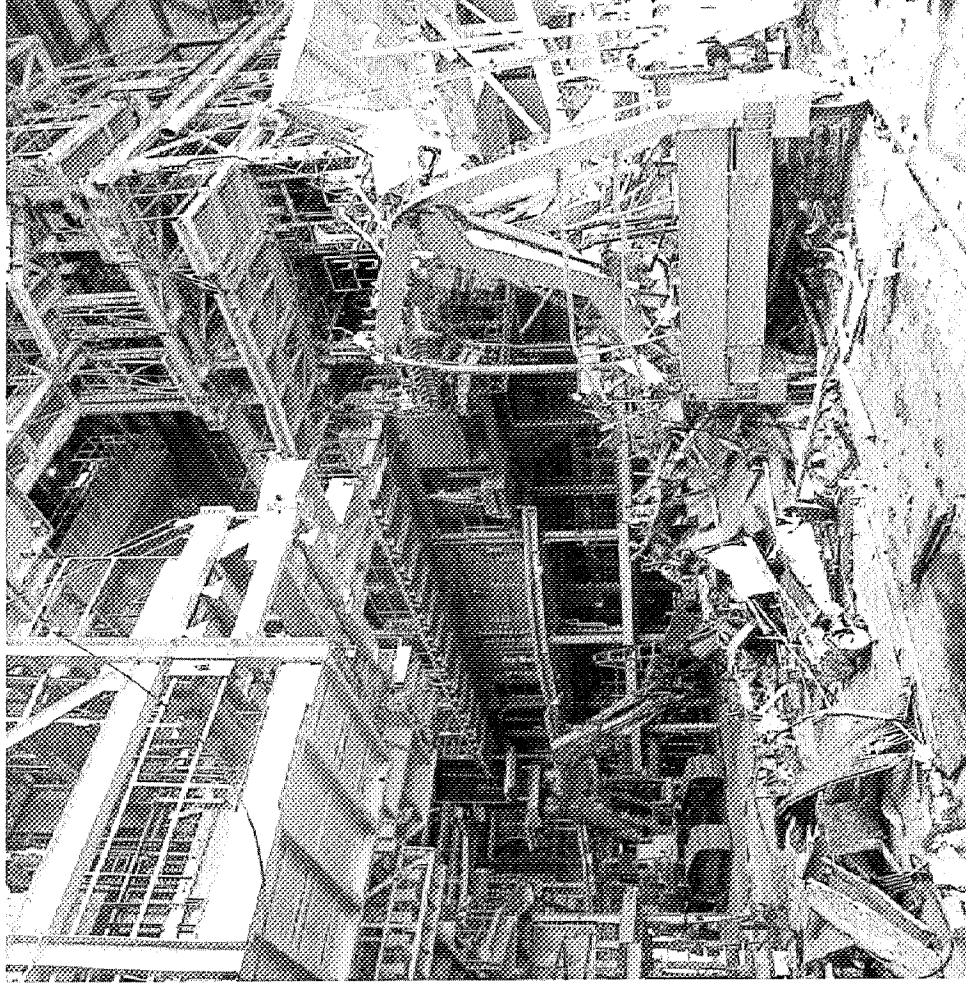


Launch Systems and Support



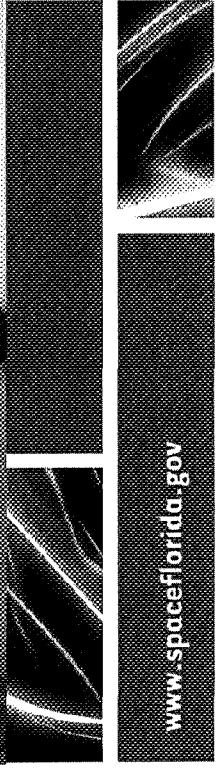
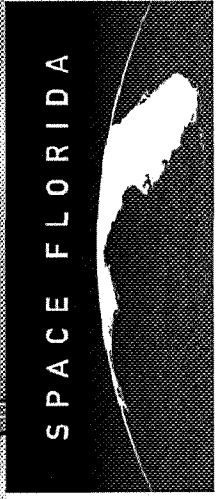
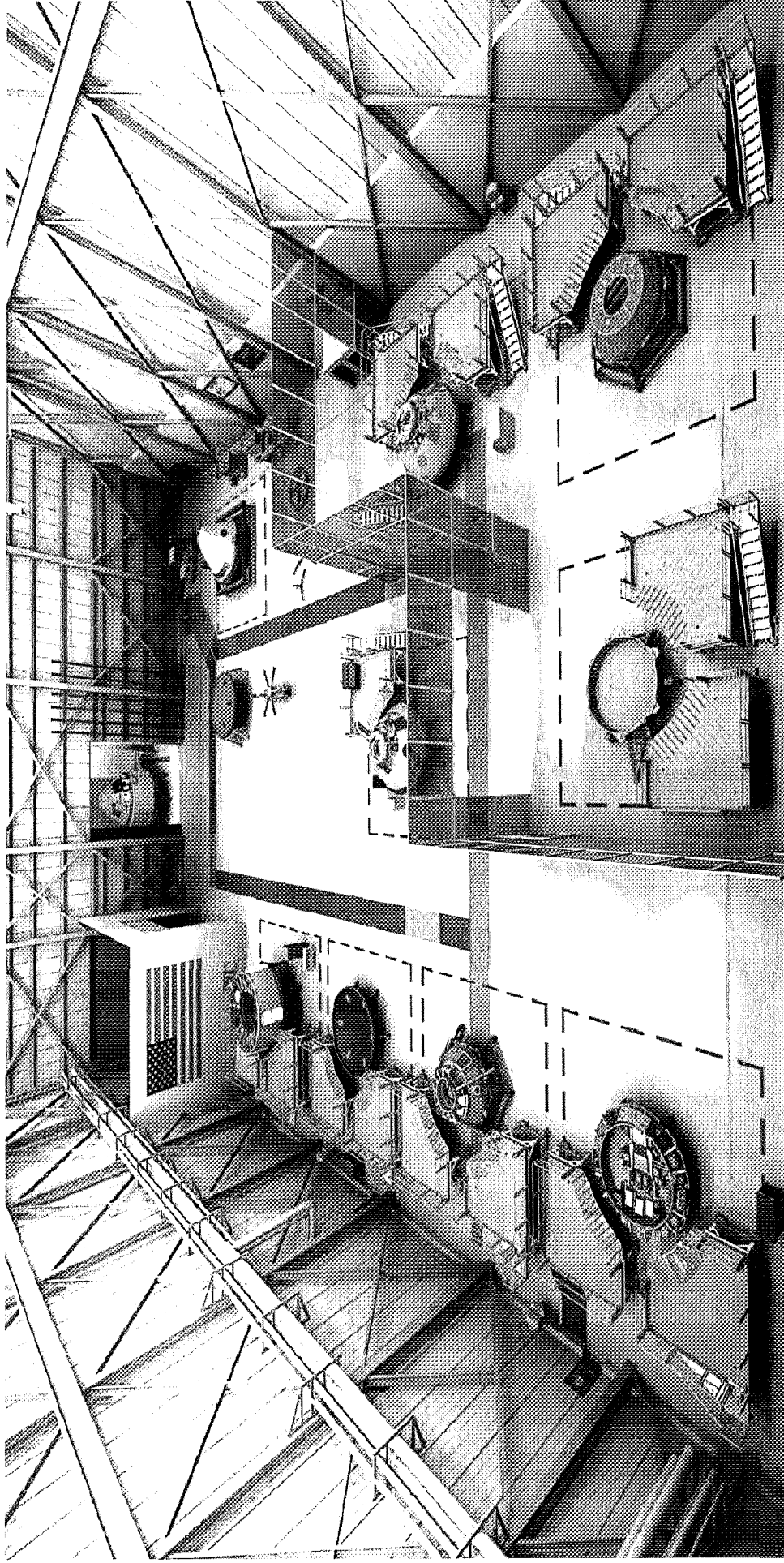
RECENT ACHIEVEMENT – KSC Transformation

Commercializing Orbiter Processing Facility-3



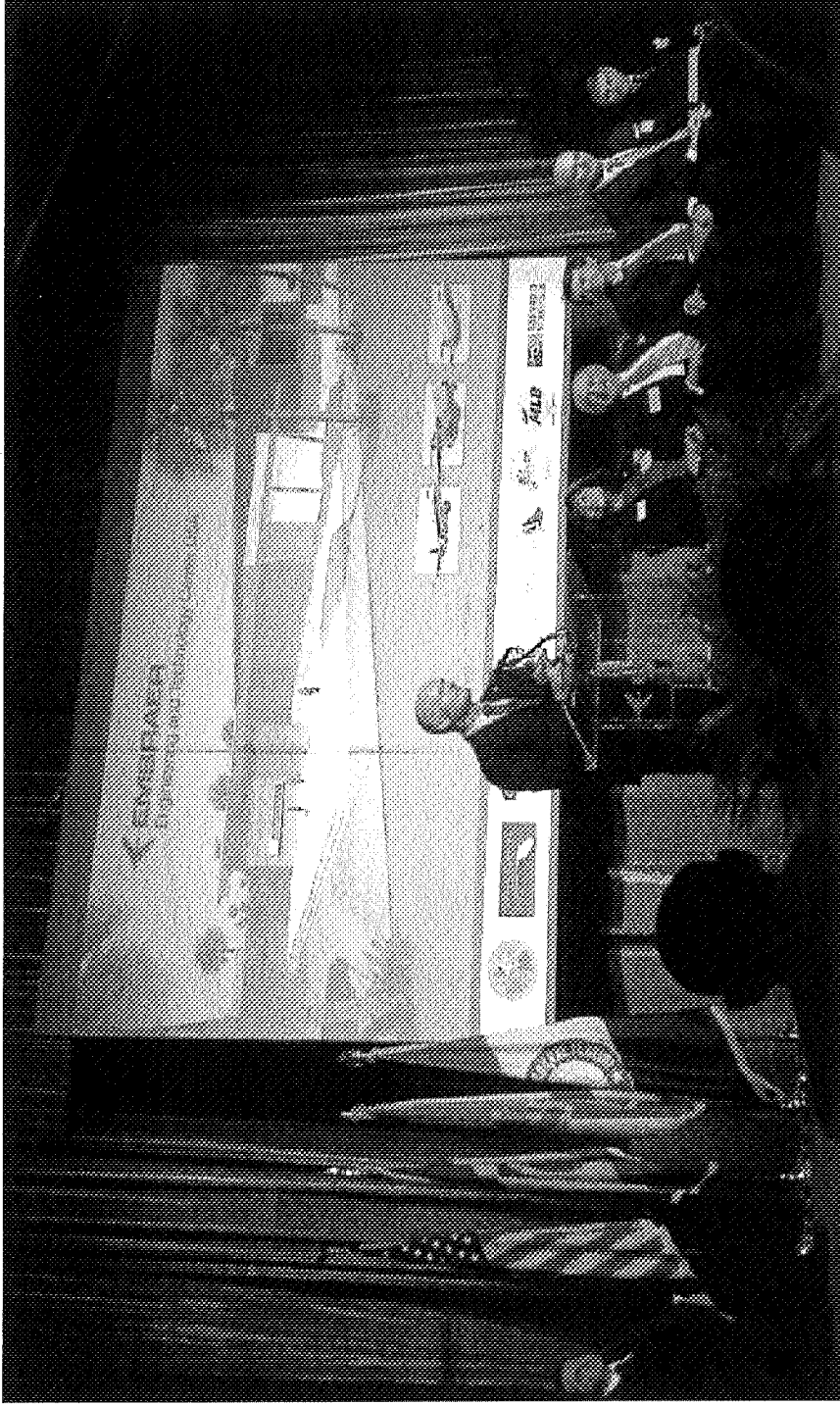
RECENT ACHIEVEMENT – KSC Transformation

Now Commercial Crew and Cargo Processing Facility (3CPF)

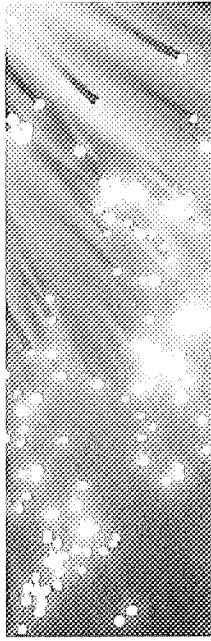
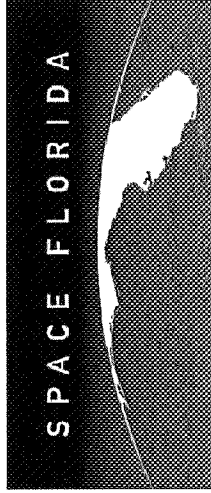
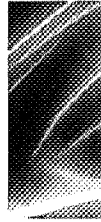
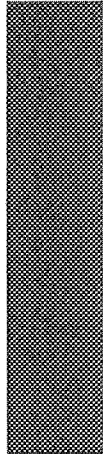


RECENT ACHIEVEMENT – EMBRAER

Design/Engineering and Technology Center USA

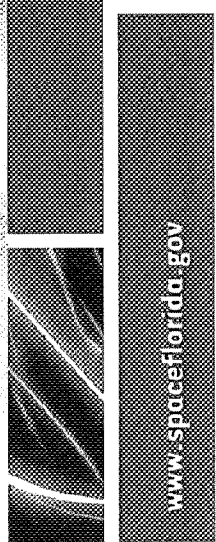
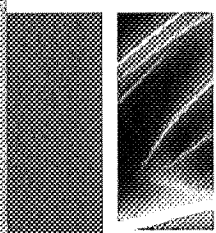
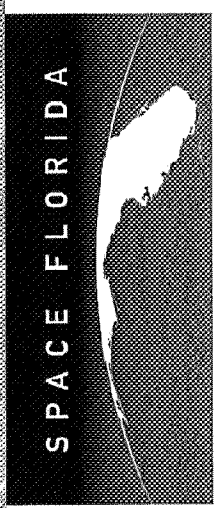
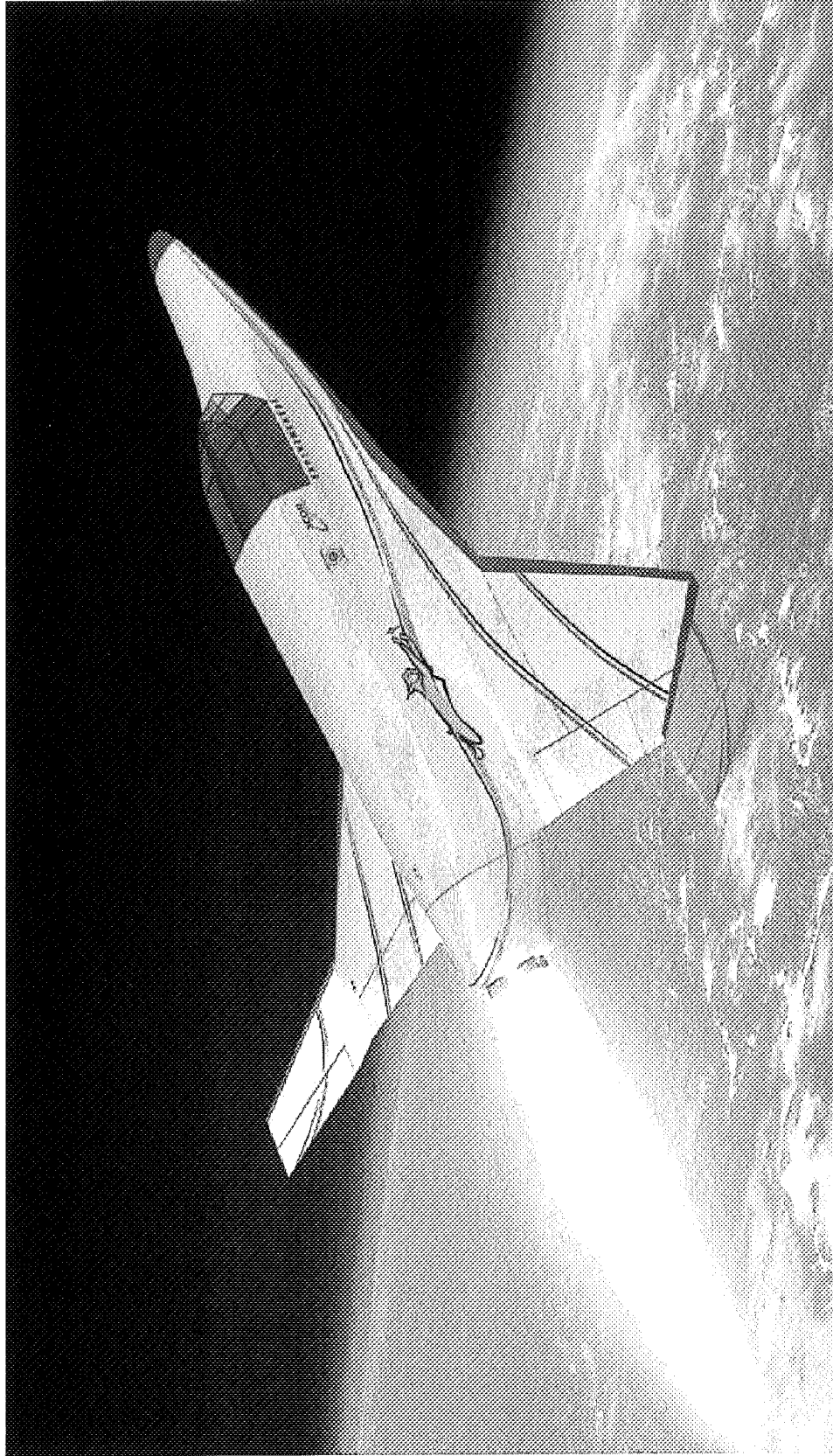


www.spaceflorida.gov



RECENT ACHIEVEMENT – XCOR

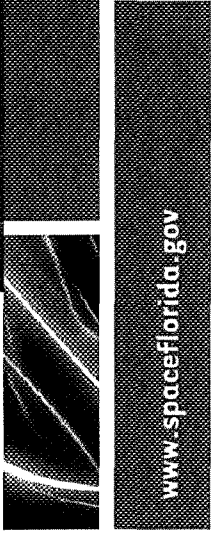
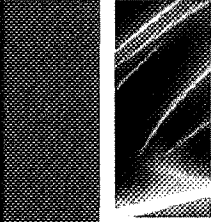
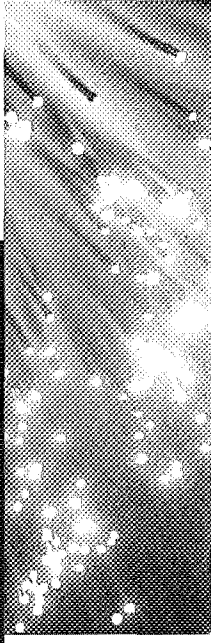
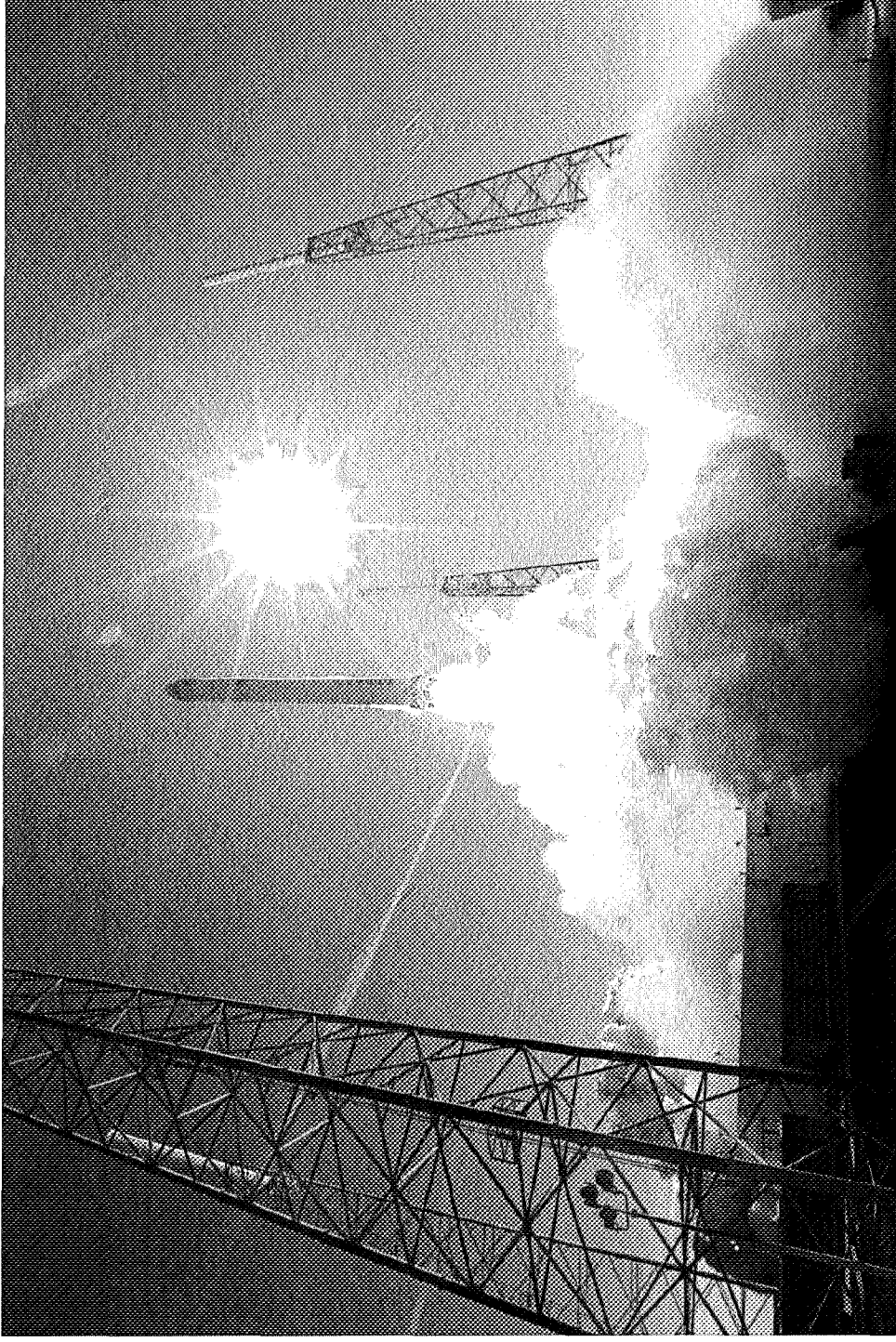
East Coast Launch and Operations



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RECENT ACHIEVEMENT – SPACE-X

Docking with International Space Station – CRS1



ACTIVE PROJECT– COMMERCIAL SPACEPORT

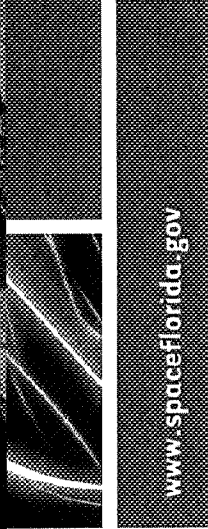
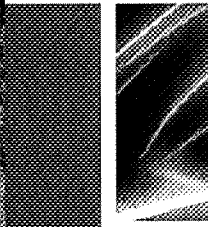
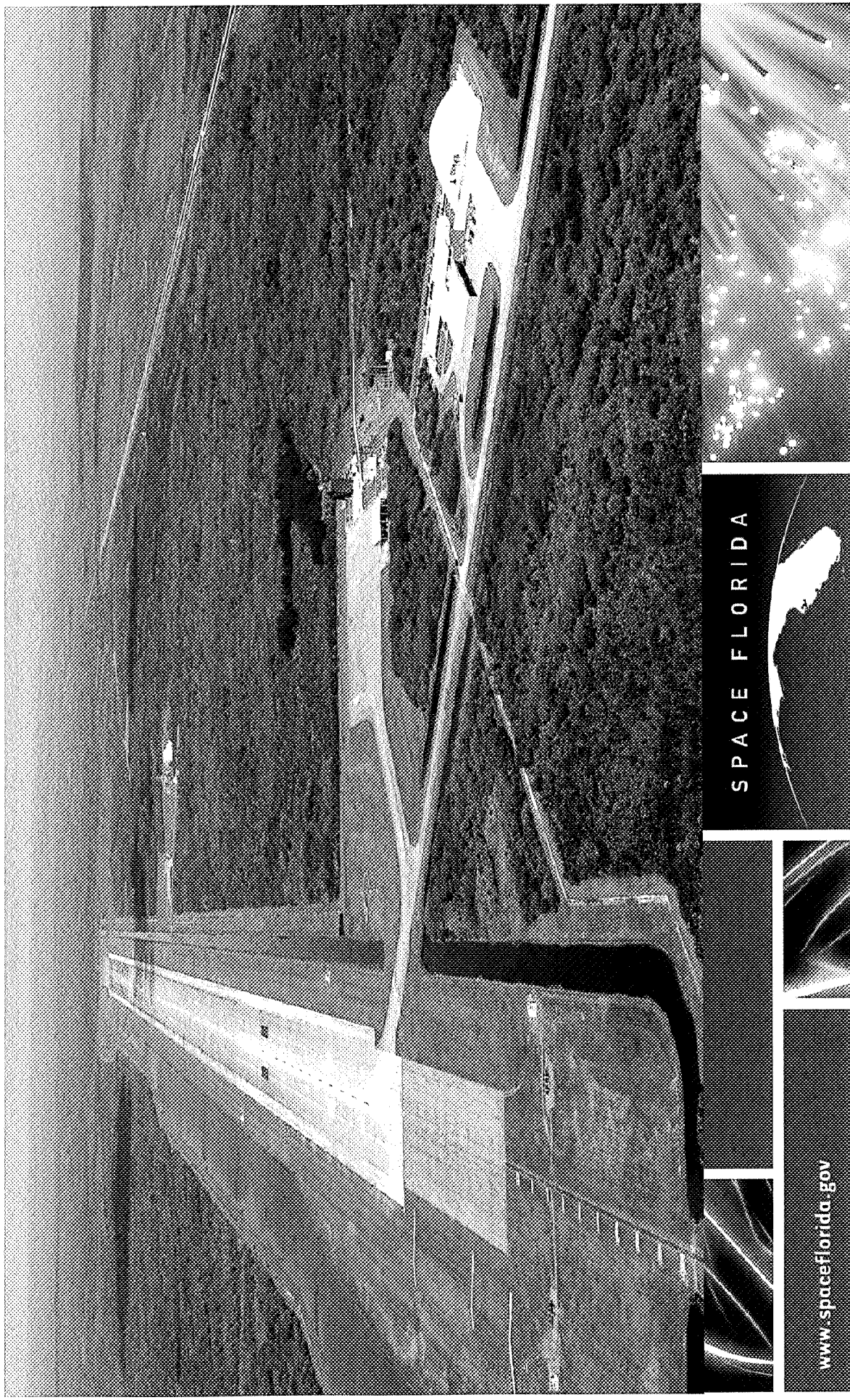
Commercial Spaceport ... away from Federal Property



www.spaceflorida.gov

ACTIVE PROJECT— COMMERCIALIZE the SLF

Turn Shuttle Landing Facility into Horizontal Spaceport



www.spaceflorida.gov

2013 Legislative Priorities

- ***Budget***

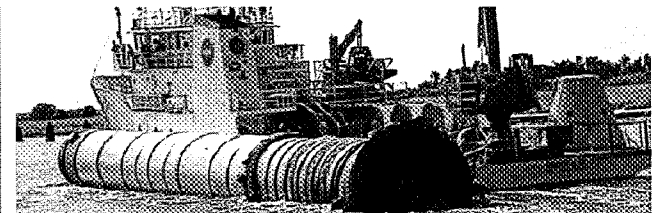
- ***\$10 million for business development and operations (\$4 million recurring) in current year***

- ***Financing Funds***

- ***\$10 million appropriated in 2010 session***
- ***Most important tool in “tool kit”***
- ***~1500 aerospace jobs created from 2010 funds***
- ***Tool unique to Space Florida***



Ground and Operations
Support Systems

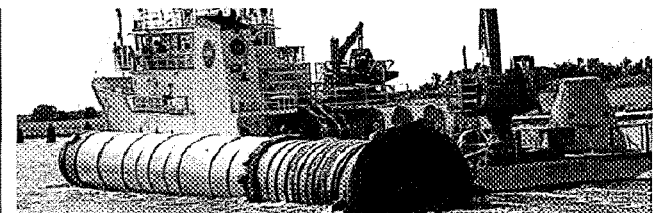


2013 Legislative Priorities

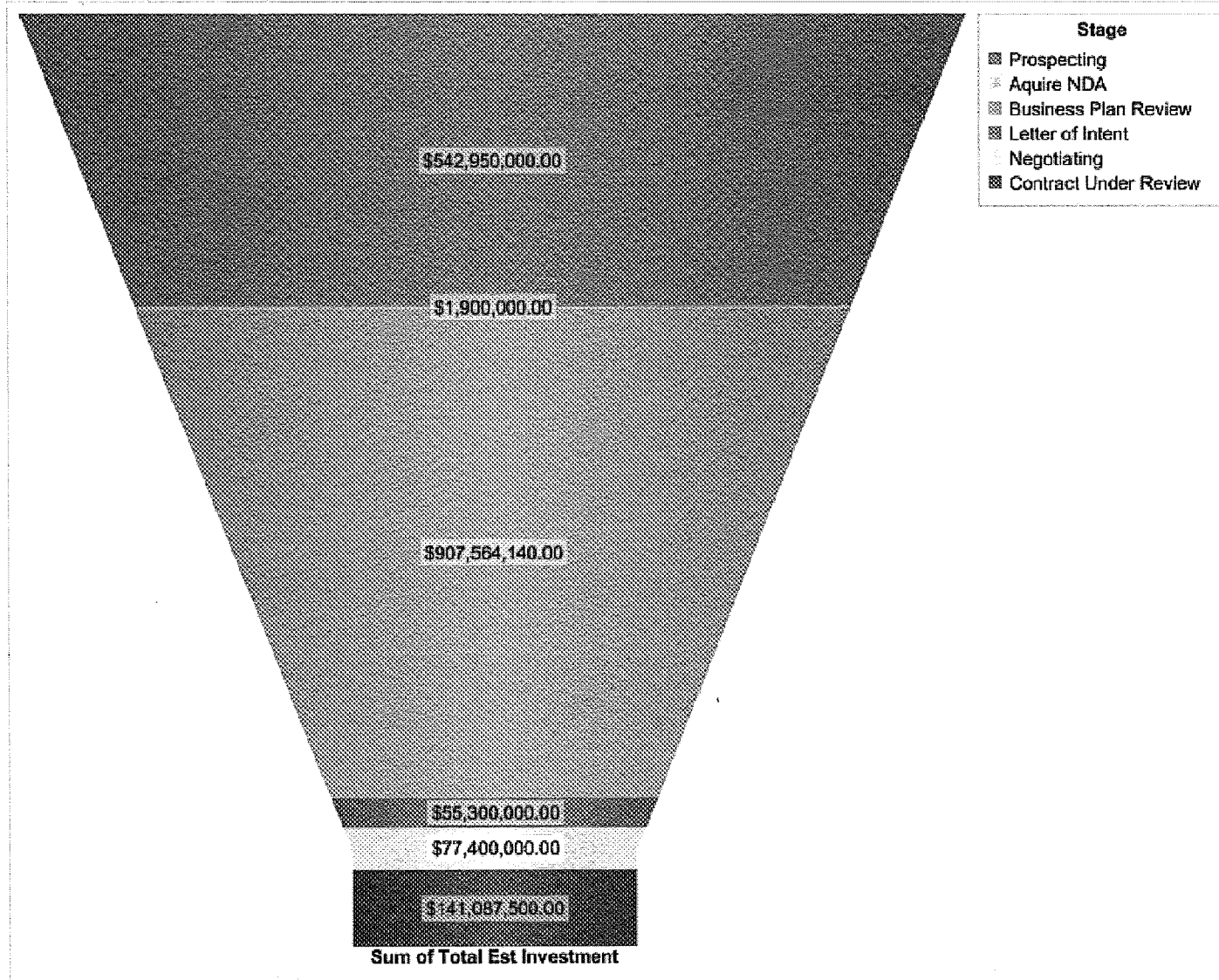
- ***Policy***
 - ***Space Codification with FDOT Package***
 - ***Similar to Seaports in 2012***
 - ***Sets minimum annual spaceport funding levels***
 - ***Financing backstop***
 - ***QTI/QDSC Per-Company Cap Removal***
 - ***Passed by Florida House in 2012***



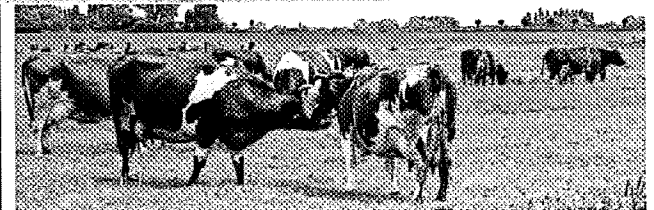
Ground and Operations
Support Systems



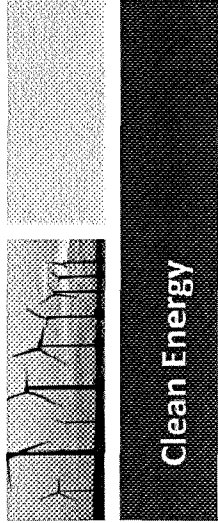
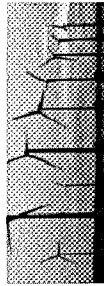
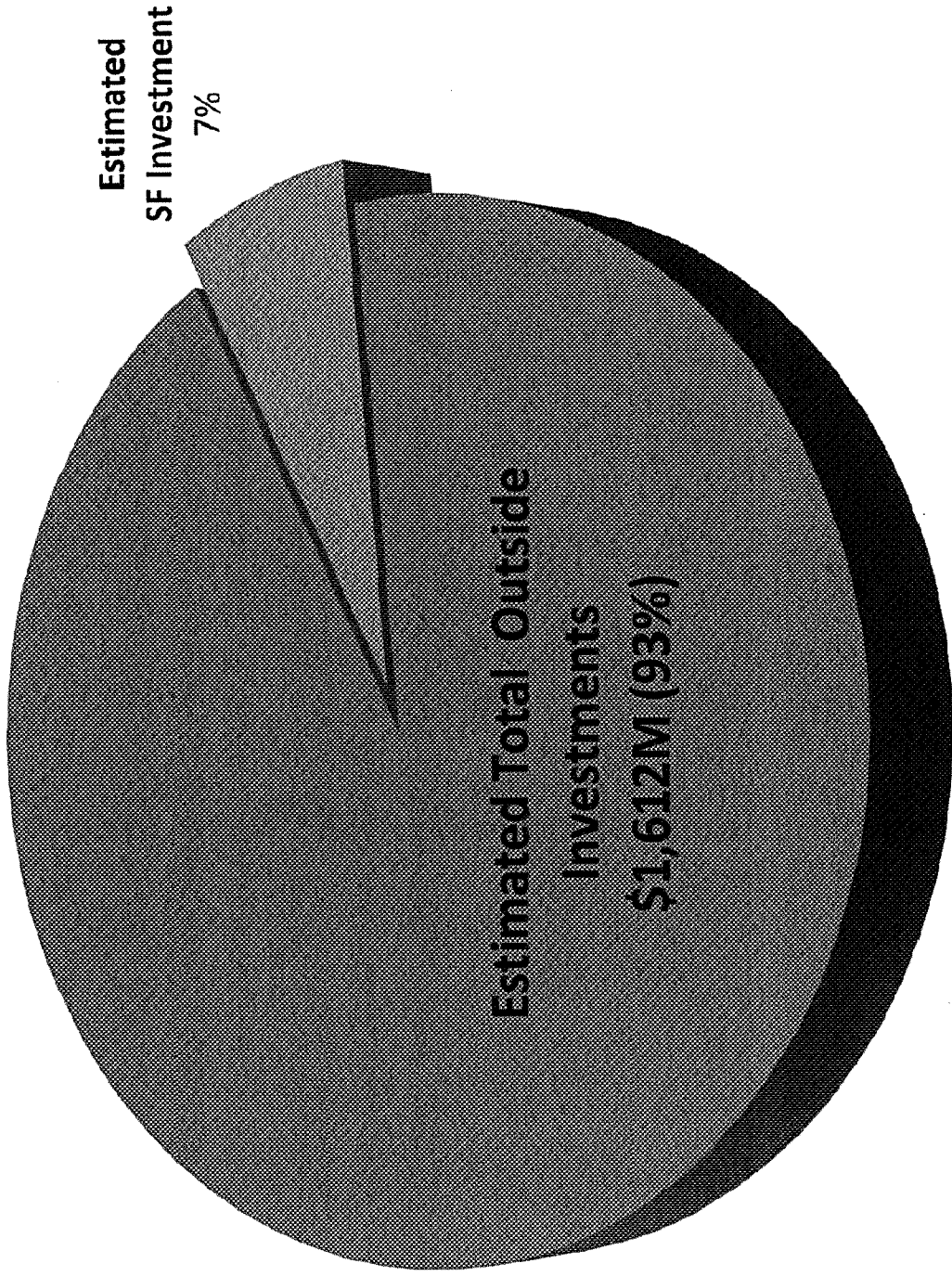
Statewide Projects in the Pipeline ... 80+ Deals



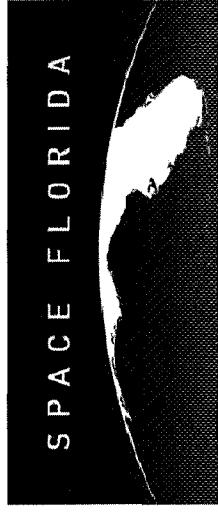
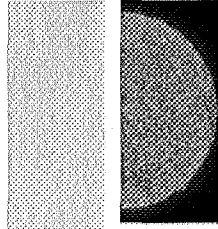
Agriculture, Climate and Environmental Monitoring



Space Florida Estimated Strategic Investments



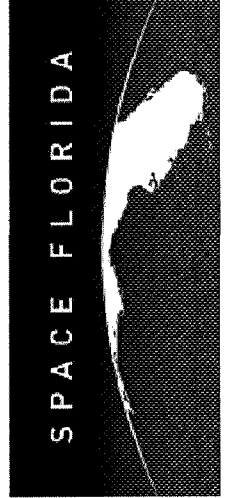
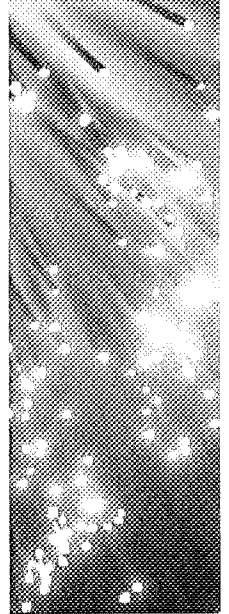
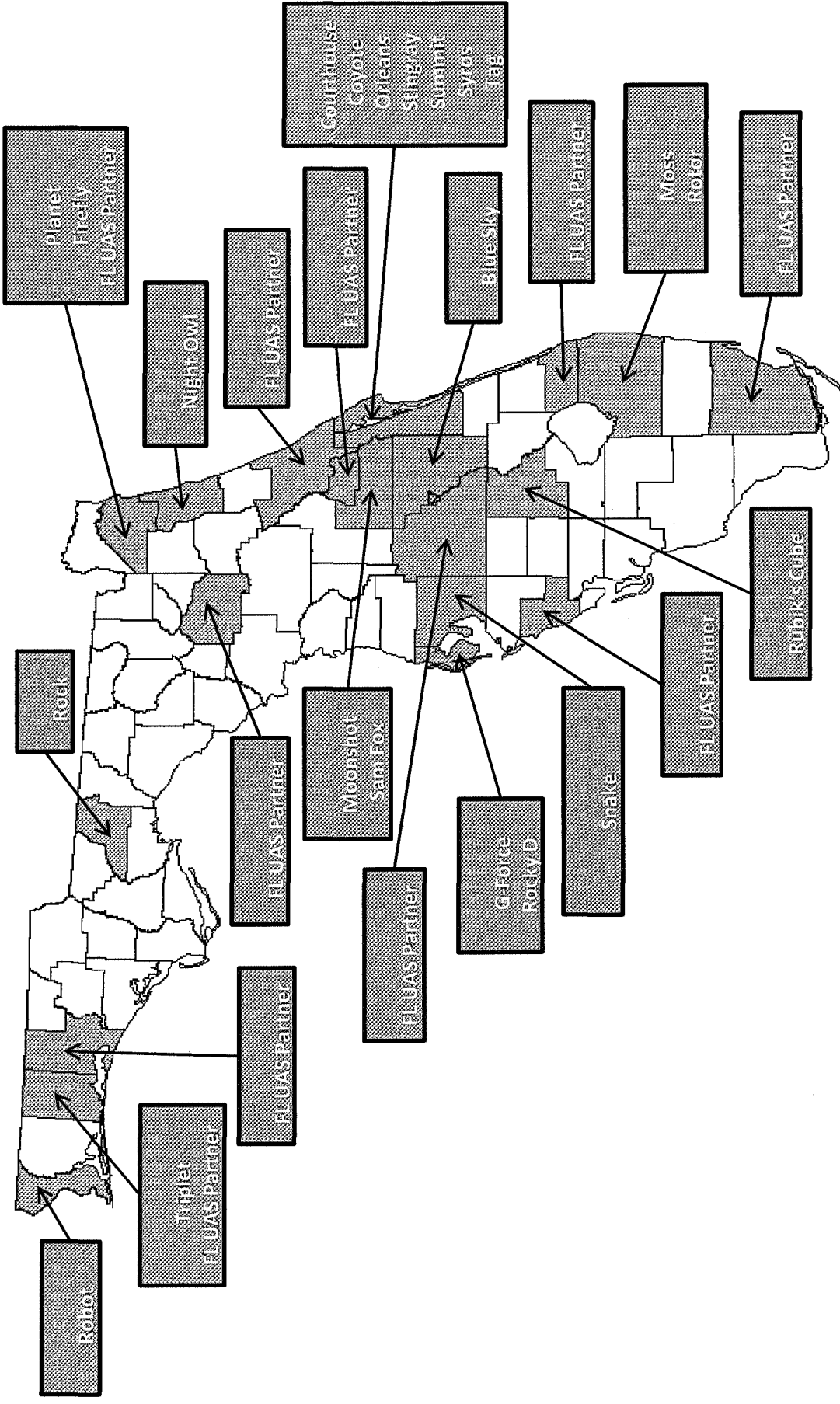
Clean Energy



SPACE FLORIDA



SPACE FLORIDA'S KEY PROJECTS BY COUNTY



www.spaceflorida.gov

A decorative graphic consisting of a dark background with a white, curved, metallic-looking element. Below it is the website URL "www.spaceflorida.gov".

**FLORIDA HOUSE
TRANSPORTATION AND
ECONOMIC DEVELOPMENT
APPROPRIATIONS**

**Jim Kuzma, COO
Space Florida**

January 23, 2013



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