



Transportation & Economic Development Appropriations Subcommittee

**Tuesday, September 24, 2013
1:00 PM - 3:00 PM
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: Tuesday, September 24, 2013 01:00 pm

End Date and Time: Tuesday, September 24, 2013 03:00 pm

Location: Reed Hall (102 HOB)

Duration: 2.00 hrs

Visit Florida Presentation

Overview on Tourism and Marketing Activities

Staff presentation on Long-Range Financial Outlook Major Drivers for Fiscal Years 2014-15 through 2016-17

NOTICE FINALIZED on 09/17/2013 15:42 by MRI

COMMITTEE MEETING REPORT
Transportation & Economic Development Appropriations Subcommittee
9/24/2013 1:00:00PM

Location: Reed Hall (102 HOB)

Summary: No Bills Considered

Committee meeting was reported out: Tuesday, September 24, 2013 3:05:17PM

COMMITTEE MEETING REPORT
Transportation & Economic Development Appropriations Subcommittee
9/24/2013 1:00:00PM

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		
Reggie Fullwood	X		
Tom Goodson	X		
Jeanette Nuñez			X
Jose Oliva	X		
Kathleen Peters	X		
Elizabeth Porter	X		
Lake Ray	X		
David Richardson	X		
Hazelle Rogers	X		
Victor Torres, Jr.	X		
Totals:	12	0	1

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COMMITTEE MEETING REPORT
Transportation & Economic Development Appropriations Subcommittee
9/24/2013 1:00:00PM

Location: Reed Hall (102 HOB)

Presentation/Workshop/Other Business Appearances:

VISIT FLORIDA

Secombe, Will - Information Only

President/CEO, VISIT FLORIDA

2540 W. Executive Center Cr

Tallahassee Florida 32301

Phone: 850-205-3803

Committee meeting was reported out: Tuesday, September 24, 2013 3:05:17PM

DISTRIBUTED
TO MEMBERS
FROM VISIT FLORIDA
9/24/13

The Sunshine State's No. 1 industry, tourism was responsible for welcoming 91.4 million visitors in 2012 and spent \$71.8 billion, generating 23 percent of the state's sales tax revenue and employing nearly 1.1 million Floridians. For every \$1 spent on tourism marketing, VISIT FLORIDA – the state's official tourism marketing organization – generates more than \$258 in tourism spending and \$15 in new sales tax collections, paid by visitors, not residents. Thirty-nine percent of all Florida visitors are significantly influenced in their decision to visit Florida by one or more VISIT FLORIDA marketing initiatives. VISIT FLORIDA promotes tourism to Florida through sales, advertising, promotions, public relations and visitor services programs. As a public/private partnership, VISIT FLORIDA has nearly 12,000 tourism industry businesses, including 100 Invested Partners, 9,200 web affiliates and major strategic alliance partnerships with Disney Destinations, Rent A Car, The Hertz Corporation, SeaWorld Parks Entertainment and Universal Orlando.

Learn more about VISIT FLORIDA at
VISITFLORIDA.COM
#VISITFLORIDA

VISIT FLORIDA Year in Review 2012-2013



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W. Executive Center Circle, Suite 200, Tallahassee, Florida 32301

VISITFLORIDA®



Dear Friends,

I am proud to share that last year marked the second consecutive record year for Florida tourism, having welcomed 91.4 million visitors who spent \$71.8 billion. This incredible momentum is a testament to the strength of VISIT FLORIDA and the Florida tourism industry's innovative efforts to market the

Shine State. On behalf of the State of Florida, I would like to thank the more than one million Floridians employed in the tourism industry who dedicate themselves to increasing visitation to our state and for the hospitality you provide to our visitors.

As we commemorate the 500th anniversary of Florida's discovery by European explorers, I am reminded that tourism has long been the state's leading industry and continues to serve an essential role in the growth and sustainability of our economy. VISIT FLORIDA, acting as the state's official tourism marketing corporation, is the catalyst that brings the public and private sectors together to create marketing programs that promote the Sunshine State to travelers around the globe. Over its 50-year history, VISIT FLORIDA has been a \$1.5 billion destination marketing cooperative, matching \$474 million in public funding with \$1.04 billion of private investment by nearly 12,000 Florida tourism businesses and strategic alliance partners.

To further the Sunshine State's reputation as a world-class, award-winning meeting and vacation destination, since it was established, VISIT FLORIDA and the Florida tourism industry might be content to rest on their laurels and past accomplishments. However, in today's highly competitive global marketplace, it is more important than ever that VISIT FLORIDA continue to take a leadership role in positioning our state as a top-of-mind destination using cutting-edge marketing strategies that resonate with our visitors.

Building on two consecutive record years, and with your continued support, Florida is well-positioned to achieve the goal of establishing itself as the No. 1 travel destination in the world.

Sincerely,

Rick Scott
Governor

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Dear Partners and Friends,



The past two years have been marked by big changes and even bigger accomplishments for the Florida tourism industry. We have had two consecutive years of record visitation, 37 consecutive months of job growth, a record 1,087,700 Floridians employed in the tourism industry and are the top vacation destination for domestic visitors, families, beach-goers, Baby Boomers, Millennials and African American leisure travelers.

Much of this success is attributable to the industry's ability to transform the way we market ourselves to the world. To this end, VISIT FLORIDA is in the midst of a massive re-engineering to maximize the impact of our integrated marketing efforts and to improve the efficiency of the organization. We have launched a new brand campaign, redesigned our website, hired a new agency of record, instituted a new customer relationship management system, added a new accounting system, brought all advertising sales and operations in-house, and created a revolutionary content initiative that has produced over 700 stories, videos, photo essays and infographics. These transformational efforts have not gone unnoticed by the national tourism industry, with VISIT FLORIDA having been named the State Tourism Office of the Year by the Southeast Tourism Society.

The entire Florida tourism industry is grateful to Governor Rick Scott and the Florida Legislature for providing VISIT FLORIDA with a significant increase in public funding over the past two years. This is a clear indication that state leaders recognize the importance of tourism and our industry's role in strengthening the Florida economy and creating jobs for Floridians. It is also a strong endorsement of the industry-driven nature of our public/private partnership and our collective success in generating a substantial return on the state's investment in VISIT FLORIDA's cooperative marketing programs.

Thank you for your continued support and for all you do to build the momentum of the Florida tourism industry.

Regards,

J. William Seccombe
President and CEO, VISIT FLORIDA

VISIT FLORIDA's Mission

is to promote travel and drive visitation to and within Florida

VISIT FLORIDA's Vision

is to establish Florida as the No. 1 travel destination in the world

VISIT FLORIDA's Values

are Integrity, Excellence, Innovation, Inclusiveness, Welcoming, Fun and Teamwork

VISIT FLORIDA's Purpose

is to brighten the lives of all

VISIT FLORIDA's Strategic Goals

Provide leadership to ensure the Florida tourism industry is competitive and sustainable

Become the trusted source of travel information that informs and inspires travel to and within Florida

Protect and grow Florida's share of destination travel through integrated sales and marketing programs that drive visitation to and within Florida

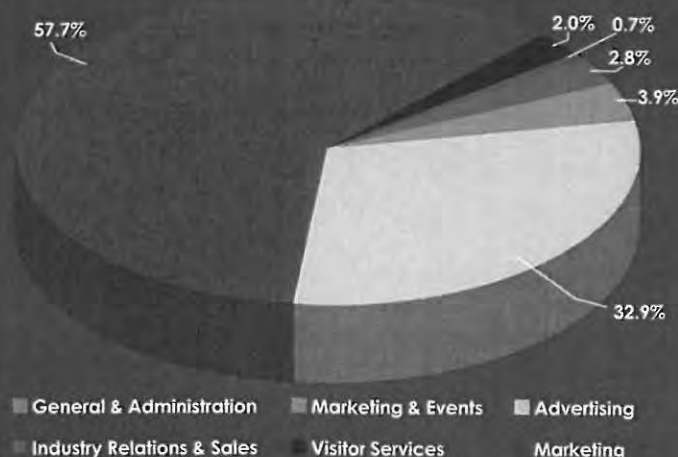
Leverage VISIT FLORIDA resources through cooperative marketing programs that create and add value for partners within and outside the Florida tourism industry

Put all VISIT FLORIDA resources to their highest and most productive uses to maximize operating efficiencies and the impact of all organizational efforts

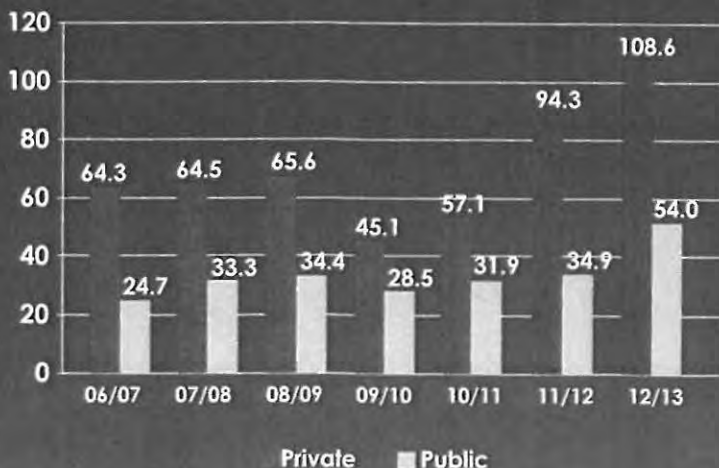
Financial Overview

As a public/private corporation, VISIT FLORIDA adheres to stringent guidelines for the proper stewardship of the public and private funding we receive. Each year, a third-party audit is conducted on VISIT FLORIDA's financial statements and compliance with our state contract. VISIT FLORIDA has received an unqualified opinion every year since our founding in 1996.

Actual Expenses: 2012-2013



Actual Revenues: 2006-2013 (In millions of dollars)



Note: For fiscal year 2009-2010, Public Funds of \$28.5 million includes \$6.6 million in Deepwater Horizon Recovery Proceeds
Note: For fiscal year 2010-2011, Public Funds of \$31.9 million includes \$5.2 million in Deepwater Horizon Recovery Proceeds

This "Year in Review" brochure offers a quick overview of collective achievements in 2012-2013, you are invited to learn more about the organization and our programs by viewing online interactive Annual Report at VISITFLORIDA.org/AnnualReport.

2012-2013 Annual Highlights

On behalf of the Sunshine State's tourism industry, VISIT FLORIDA was focused on maximizing the impact of our marketing resources to attract visitors to the state during the 2012-2013 fiscal year. The following "Annual Highlights" showcase just a few of the ways VISIT FLORIDA's responsiveness and leadership helped grow the Florida brand during the past year.

Partnered with Emeril Lagasse to host "**Emeril's Florida**," a new television show on the Cooking Channel featuring the high-energy host exploring dining, entertainment and travel opportunities at destinations throughout the Sunshine State



Announced that the VISIT FLORIDA Travel Wire – a network of more than 60 veteran journalists writing, photographing and filming stories on Florida destinations – had begun appearing twice weekly on **The Huffington Post** online



Won the National Council of State Tourism Directors' 2012 Mercury Award for our **Florida Fan Game** contest which called on residents and fans to share their passion for college football by inviting friends and family to visit for a game this season

Partnered with the Floric Association of RV Parks and Campgrounds to celebrate **Florida Camping Month** through interactive displays at the Official Florida Welcome Centers, which assist more than 2.3 million visitors each year.

July



Partnered with the Florida Department of Environmental Protection's Florida Parks Service to launch the **State Parks component of the Share A Little Sunshine** campaign, including public service announcements and video vignettes for the web

August

September

Launched the **Hook, Line Sweepstakes** which brought two of VISIT FLORIDA's most marketing partners – the Race Team and the Bachelor television show – to create a seeker's chance of

Named the **2012 State Tourism Office of the Year** by the Southeast Tourism Society for a host of strategic and innovative VISIT FLORIDA projects that expanded the reach and relevance of the Florida brand to new audiences



Kicked off VISIT FLORIDA's year-long **Viva Florida 500 campaign**, including a "Share Your Florida Story" Facebook timeline, Florida's 500 Years of Adventure Sweepstakes and Florida's 500 featuring Ponce de Leon



Teamed up with the Florida Restaurant & Lodging Association, the Florida Department of Agriculture & Consumer Services and the Florida Lottery to sponsor the **"Share A Little Sunshine Showdown"**



Organized a huge presence for the Florida tourism industry at **World Travel Market** – the second largest tradeshow in the world – including a two-hour media event on the tradeshow floor and hosting the "Florida's Got the 'F' Factor" competition



Announced VISIT FLORIDA's acquisition of **Florida Huddle**, the longest running travel trade show in Florida where suppliers from across the state meet directly with domestic and international buyers of travel and travel media

October

November

December



Released results of annual survey showing return on investment for **VISIT FLORIDA's 2011 advertising campaign** which generated \$258 in traveler spending and \$15 in new sales tax revenue for every \$1 of advertising spend



Held first in a series of **events** organized by the Meeting & Events Influential Travel Partners in collaboration with Boston, Chicago, and

Unveiled the redesigned **VISITFLORIDA.com website** that leverages current technology trends to reflect VISIT FLORIDA's evolving commitment to provide consumers with fresh, high-quality content that inspires travel to Florida



Partnered with the Florida Chamber Foundation on the addition of a **new Tourism Indicators tab on The Florida Scorecard** that utilizes metrics to track the impact of Florida's tourism industry on the state's economy



Debuted *VISIT FLORIDA*, a half-hour show of **Spanish-language travel stories** reported and produced by VISITFLORIDA.com journalists on InfoMás, Bright House Network's 24-hour Spanish-language news and information channel



Released results of **Investment Influence** Florida visitors by one or more efforts, marking **ROI increases**



Unveiled the new **Must Be the Sunshine** campaign, the first major product of VISIT FLORIDA's creative relationship with Miami's SapientNitro and marked the first time Disney, Busch Gardens, SeaWorld and Universal partnered together in the same ad



March

February

January



Unveiled **new travel trade show** VISIT FLORIDA's first trade show to bring together Florida's tourism industry and our Industry partners from cities such as Atlanta, Philadelphia



Announced that 2012 was the **second consecutive record year for Florida tourism** with 91.4 million visitors who spent \$71.8 billion, generating 23 percent of the state's sales tax revenue and employing more than one million Floridians

Hosted the industry's annual **Florida Tourism Day at the Capitol** in conjunction with the Partnership for Florida's Tourism and five other statewide organizations to showcase the state's No. 1 industry to the legislature





Thanked Governor Scott and the Florida Legislature for their extraordinary support of the Florida tourism industry with the announcement of a **\$9.5 million increase in public funding for VISIT FLORIDA**, representing a record \$63.5 million for FY 2013-2014



Created a new statewide **Share a Little Sunshine PSA** reminding in-state residents of the endless opportunities for summer fun in Florida and sharing creative ideas for inviting friends and family to visit

39%
Of visitors were significantly influenced by VISIT FLORIDA marketing efforts



Established the new **Marketing Solutions & Sales Department** tasked with managing and selling VISIT FLORIDA's owned and operated assets, including e-newsletters, printed maps, online Epic Vacation Maker and other web advertising opportunities

the annual *Return on Study* that show 39% of significantly influenced IT FLORIDA's marketing **fourth consecutive year**

June

May

April

Announced that 26 million visitors came to Florida in the first quarter of 2013 – an increase of 4.7 percent over the same period in 2012 – making it the **biggest quarter for visitation in the history of Florida tourism**



Coordinated an event in France where Governor Scott and Florida tourism representatives met with a contingent of international airline executives and tour operators to discuss **efforts to increase airlift to Florida**



held a media reception onboard the *República*, a replica of Spanish ships from the 1500s, that VISIT FLORIDA and Industry Partners collaborated with the Victoria Foundation to have sail from Spain to Florida as part of the **500th anniversary commemoration**



Hosted the **iHeartRADIO Ultimate Pool Party presented by VISIT FLORIDA** – a two-day music festival held at the Fontainebleau Miami Beach that generated 60 million impressions across more than 100 Clear Channel radio, digital and social channels



Measures of Success Fiscal Year 2012-2013

While VISIT FLORIDA's successes cannot always be measured in numbers, the following highlights illustrate the impact of VISIT FLORIDA efforts to position Florida as the No. 1 travel destination in the world during the past year.

Tourism Industry

91.4 million

Total number of out-of-state and international visitors to Florida

\$71.8 billion

Total spending infused into Florida's economy by visitors

1,087,700

Number of Floridians directly employed by tourism

Industry Relations

11,880

Number of VISIT FLORIDA Partners and web affiliates

914

Number of attendees who participated in VISIT FLORIDA's 12 tourism industry or Partner webinars

Grants Program

\$378,353

Amount awarded to 85 grant recipients through the Advertising Matching Grant, the Minority Convention Grant, the Small Business Grant and the Cultural, Heritage, Rural and Nature Tourism Grant programs

Legislative Affairs

313

Number of industry representatives from 39 counties who met with more than 80 lawmakers on Florida Tourism Day at the Capitol to advocate for tourism marketing public funding

Advertising & Co-op

\$18.7 million

Industry investment in VISIT FLORIDA co-op programs

7.1 billion

Consumer impressions generated through co-op and dedicated VISIT FLORIDA advertising in domestic and international markets

Promotions

\$76.2 million

Media value generated from the execution of 169 promotional programs

2.7 billion

Consumer impressions generated from 169 promotional programs

PR & Corporate Communications

1.2 billion

Earned media impressions generated through public relations and corporate communications efforts

Internet & Social Media

7.4 million

Visits to the consumer website, VISITFLORIDA.com

2.5 million

Visits to the mobile version of VISITFLORIDA.com

769,879

Followers of VISIT FLORIDA consumer Facebook and Twitter accounts

Meetings & Events

739,561

Number of travel trade, meeting professionals and consumer attendees reached collectively by 2,788 Florida tourism Partners who participated in VISIT FLORIDA's 82 domestic and international sales programs

Welcome Centers

2.3 million

Travelers who visited VISIT FLORIDA's five Official Florida Welcome Centers

\$290,574

Tourism spending generated by 3,520 room nights booked through Official Florida Welcome Centers for reservations at hotels, state parks, campgrounds and attractions

Consumer Products

14.5 million

E-mails distributed for the Dialogue Program and other e-mail marketing programs highlighting Florida destinations

600,000

Total number of printed copies distributed of the *VISIT FLORIDA Magazine* and the *Florida Insider Magazine*

1 million

Number of 2013 Official Transportation Maps produced in-house with support from 42 tourism clients

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.

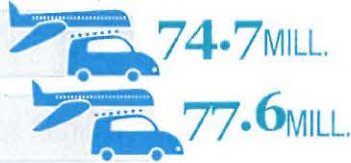
THE FLORIDA TRAVEL MARKET

91.5 MILL. + **20.3** MILL.
 Out of state and international visitors* In-state travelers

A CLOSER LOOK DOMESTICALLY SHOWS...

85% + **16.4%**
 Are domestic travelers Market share of domestic leisure visitors

Domestic travel to Florida was up 3.9%



2.4 MILL.

Travelers visited VISIT FLORIDA's five welcome centers

WHILE INTERNATIONALLY...



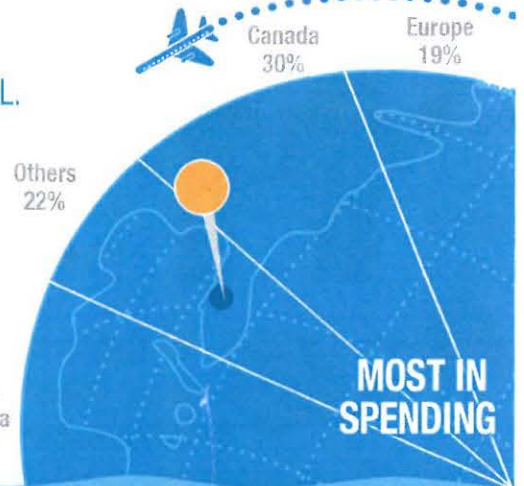
1 IN **5**

International visitors to the U.S. come to Florida

Last year, Florida welcomed international visitors from **184** countries

COUNTRIES WITH THE MOST ANNUAL VISITORS

- Canada **3.6** MILL.
- Brazil **1.7** MILL.
- United Kingdom **1.5** MILL.
- Argentina **691** K
- Venezuela **482** K
- Mexico **388** K
- Germany **376** K
- Colombia **305** K
- France **300** K
- Australia **281** K



TOURISM IMPACT ON FLORIDA'S ECONOMY

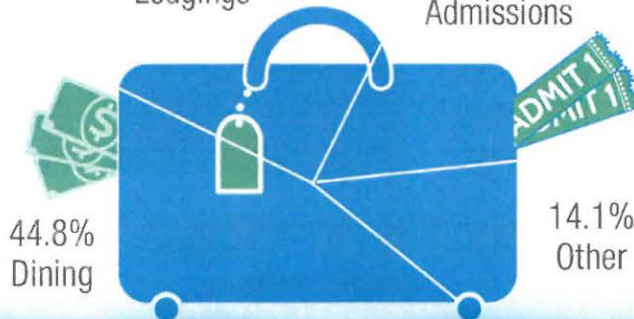
In 2012, tourism resulted in

\$71.8 BILL.
 In spending*

+ **1** MILL.
 Jobs, 1 per every 85 visitors

24.6%
 Lodgings

16.5%
 Admissions



Which generated

23%
 of sales tax revenues*
 +
\$4.3 BILL.
 In sales tax collections*

Visit SunshineMatters.org, the official blog for Florida Tourism.

FLIP FOR MORE

* Preliminary estimate

REACHING THE TARGET AUDIENCE

2.3 BILL.
Impressions



\$66 MILL.
Media value generated from negotiated promotional programs

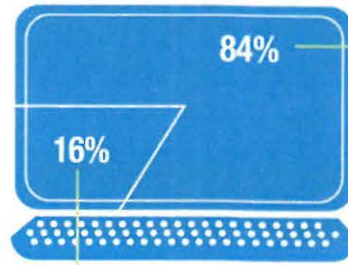
Media value generated from negotiated promotional programs



3.5 BILL. Consumer impressions generated through co-op and dedicated advertising in domestic and international markets

71k⁺
Followers on VISIT FLORIDA consumer Twitter accounts

751k⁺
Likes on VISIT FLORIDA consumer Facebook accounts

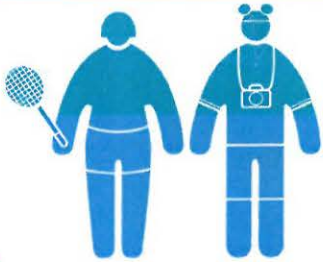


6.5 MILL.
Visits to VISITFLORIDA.com

1.2 MILL.
Visits to the mobile version of VISITFLORIDA.com

Up by **300%**
in mobile traffic year to year

INVESTMENT THAT SHOWS RESULTS

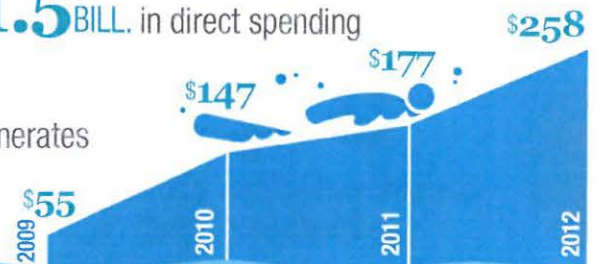


39%
Of visitors were significantly influenced by VISIT FLORIDA marketing efforts

78% Of site visitors traveled to the state and spent an average **\$3,298**/TRIP resulting in **\$11.5** BILL. in direct spending



For every **\$1** spent on tourism advertising, VISIT FLORIDA generates **\$258** in tourism spending and **\$15** in new sales taxes (Paid by visitors, not residents)



SUCCESS FOR AND WITH OUR PARTNERS

Florida tourism industry invests



\$2

In marketing programs for every



\$1

The state of Florida invests



And private investment in VISIT FLORIDA's total budget shows growth

2009/10
2010/11
2011/12



\$45.1 MILL.



\$57.1 MILL.



\$94.3 MILL.

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

