



Transportation & Economic Development Appropriations Subcommittee

**Tuesday, September 24, 2013
1:00 PM - 3:00 PM
Reed Hall (102 HOB)**

MEETING PACKET

**Will Weatherford
Speaker**

**Ed Hooper
Chair**



The Florida House of Representatives
Appropriations Committee
Transportation & Economic Development Appropriations Subcommittee

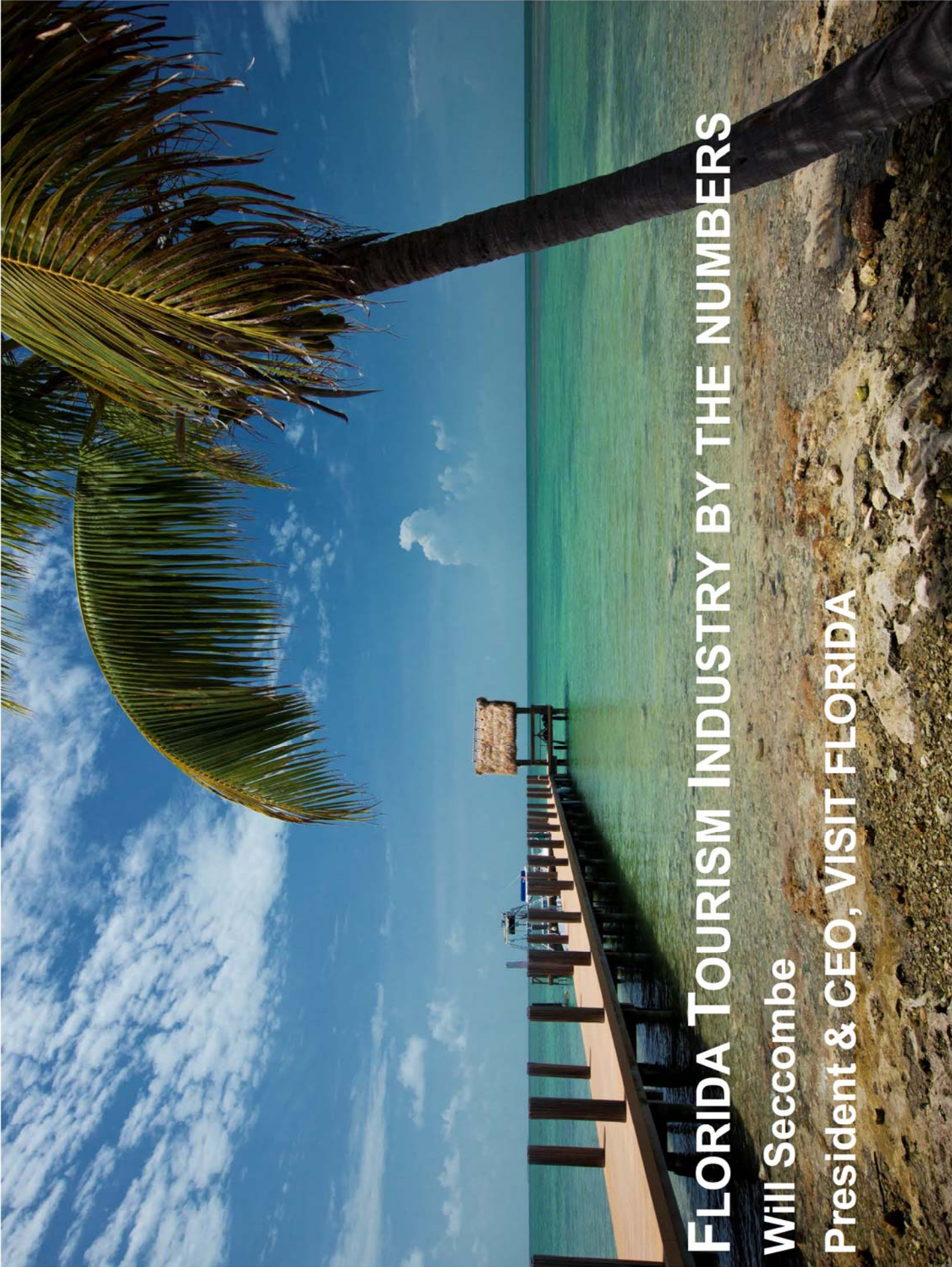
Will Weatherford
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September 24, 2013

AGENDA
1:00 PM – 3:00 PM
Reed Hall

- I. Call to Order/Roll Call
- II. Presentations
 - Overview on Tourism and Marketing Activities
Will Seccombe, President and CEO, VISIT FLORIDA
 - Long-Range Financial Outlook FY 2014-15 through 2016-17
Committee Staff
- III. Closing Remarks/Adjourn



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

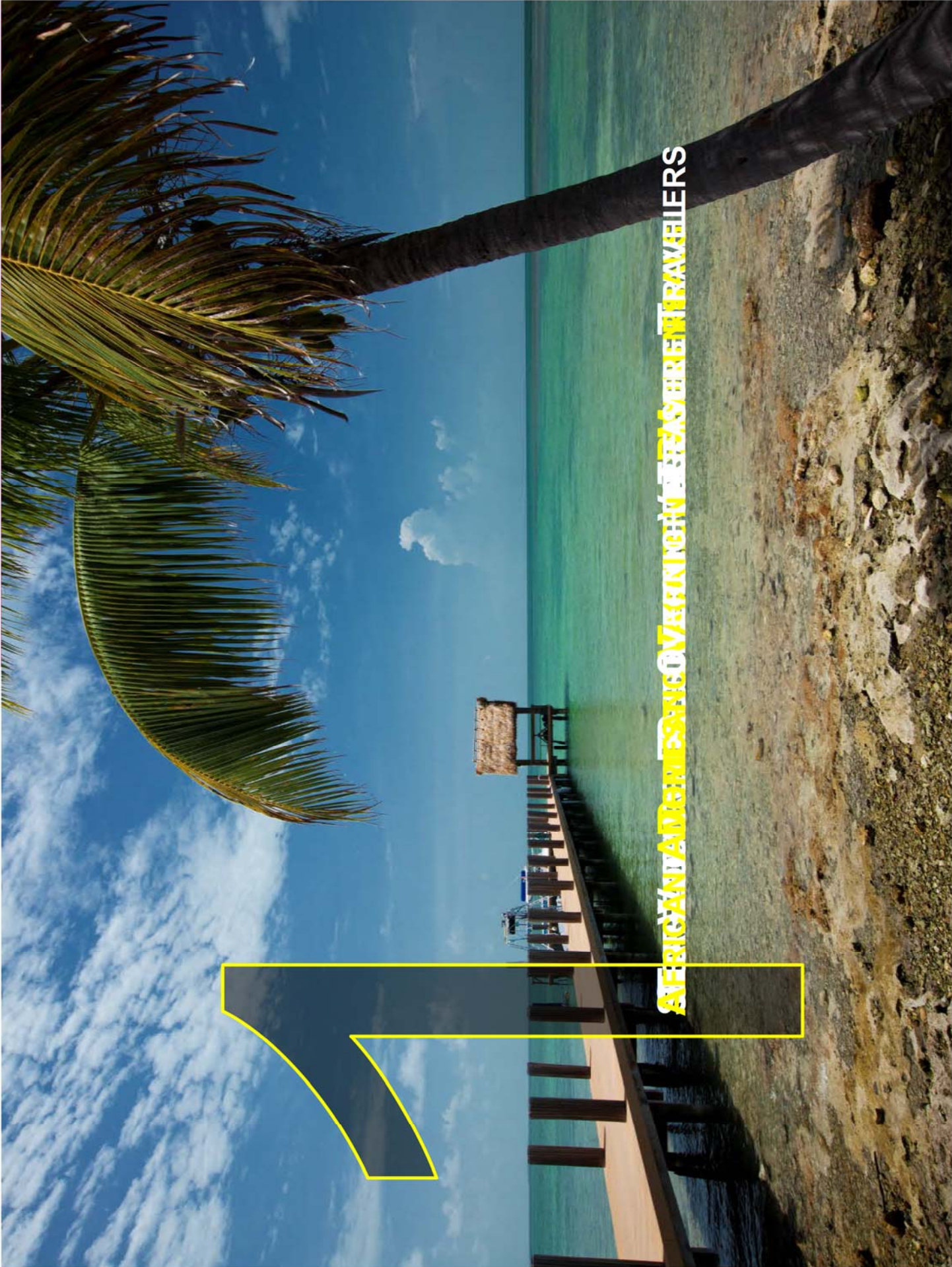
VISION

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

PURPOSE

To brighten the lives of all





AMERICAN TRAVELERS OVERNIGHT TEASER TRAVELERS



FLORIDA TOURISM HAS MOMENTUM

- Tourism-related employment has seen **39** 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



FLORIDA TOURISM BY THE NUMBERS CY2012

- **91.5 million** visitors – **up 4.7%**
 - Domestic **up 3.9%**
 - Overseas **up 10.3%**
 - Canada **up 7.2%**
- **1,058,000** Floridians employed – **up 4.1%**
- **\$71.8B** in travel spending – **up 6.8%**
- **\$4.3B** in sales tax collections – **up 6.8%**
 - **23%** of all sales tax generated from travel spending



THE CHALLENGE?

**100 Million Visitors
to the Sunshine State**



100 MILLION VISITORS MEANS*:

- Total Jobs Created: **121,298**
- Private non-Farm Jobs: **114,318**
- GDP increase: **\$6.628 Billion**
- Personal Income: **\$5.307 Billion**
- Disposable Personal Income: **\$4.615 Billion**
- Average Salary of Jobs Created: **\$43,751.75**

**Based on Florida TaxWatch Study*

MARKETING PLATFORMS

DOMESTIC

- Maintain year-round brand awareness
- Grow market share in traditional feeder markets and expand into emerging markets
- Expand Florida's digital footprint
- Strengthen marketing partnerships
- Increase brand relevance
- Increase Industry alignment and Partner engagement in VISIT FLORIDA marketing programs

IN-STATE

- Increase brand awareness
- Focus on key origin markets and advocate rich audiences
- Expand Florida's digital footprint
- Strengthen marketing partnerships
- Increase brand relevance
- Increase Industry alignment and Partner engagement in VISIT FLORIDA marketing programs

MEETINGS

- Maintain and expand brand awareness among key decision makers
- Protect share among the most important feeder markets
- Expand Florida's digital footprint specific to the meetings and business industry
- Create opportunities for partners to interact with key decision makers
- Increase brand relevance
- Increase Industry alignment and Partner engagement in VISIT FLORIDA marketing programs
- Strengthen marketing Partnerships

INTERNATIONAL

- Maintain or grow brand awareness
- Expand Florida's ability to reach consumers in non U.S. markets
- Expand Florida's digital footprint
- Maintain and expand international visitor access to the state
- Increase brand relevance
- Increase Industry alignment and Partner engagement in VISIT FLORIDA marketing programs
- Strengthen trade Partnerships

FY 2012-13 SUCCESS BY THE NUMBERS...

- PR & Corporate Communications
1.2 billion earned media impressions

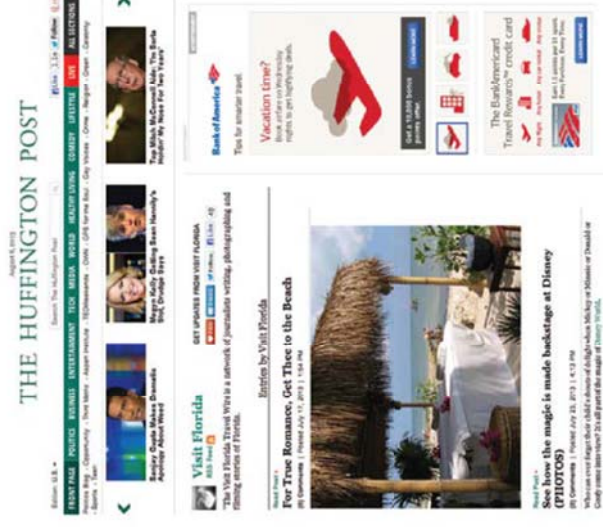
- Promotions
\$76.2 million in media value
2.7 billion consumer impressions

- Meetings & Events

Audience of **739,561** reached through **82** sales programs

- Content

Produced over **700** stories, videos, photo essays and infographics





IN MARKET YEAR ROUND

FALL CAMPAIGN | EXTRA DAY

AUGUST - NOVEMBER

WINTER CAMPAIGN
(NEW CREATIVE)

JANUARY - MARCH

(NEW CREATIVE)

SPRING CAMPAIGN
(KIDS ARE ALRIGHT)

APRIL - JUNE

(KIDS ARE ALRIGHT)

SUMMER CAMPAIGN

JULY - AUGUST

A photograph of two women on a boat, smiling and laughing. The woman in the foreground is wearing a bright pink bikini top and sunglasses, with her hair blowing in the wind. The woman behind her is wearing a purple bikini top and pink sunglasses. The background shows a blue sky with light clouds and the ocean.

**Came as friends.
Staying longer
made us accomplices.
Must be the sunshine.**

Sunny skies, wild ocean rides,
and deals inviting you to jump on in.
Make the vacation you long for, even longer.

VISITFLORIDA.COM

A man and a woman are floating on inflatable rings in a river. The man is on a yellow ring, and the woman is on a blue ring. They are both smiling and looking at each other. The river is surrounded by lush green trees and a clear blue sky with some clouds. The water is calm and reflects the surrounding greenery.

**Can't relax knowing
we leave tomorrow.
Not leaving tomorrow.
Must be the sunshine.**

Water in almost every direction
and endless deals inspiring you to stay.
Make the vacation you long for, even longer.

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See what the sunshine can do for you.

Try our travel themes with your search and get inspired by the unexpected.

Search for beaches, restaurants, hotels, and more

Go

All CITIES

- ACTION PACKED
- BUDGET MINDED
- CULTURED
- FLORIDA KITSCHY
- FOR FOODIES
- GO GREEN
- KID FRIENDLY
- LUXURIOUS
- OFF THE BEATEN PATH
- OUTDOORSY
- PARTY MODE
- ROMANCE

Vacation more for less with LIMITED-TIME DEALS >



OUR PICKS

FEATURED CITIES

FLORIDA LIVE

FLORIDA INSIDERS

TRAVEL GUIDES

VIEW

FLORIDA LIVE

FLORIDA INSIDERS

TRAVEL GUIDES

VIEW

LATEST STORIES

- Fort Lauderdale**
Step Inside Barbie's Dreamhouse in Sunrise
[Read More >](#)
- Multiple Locations**
Florida Events Calendar
[Read More >](#)
- Ocala**
Silver Springs: A Clear Choice
[Read More >](#)
- Multiple Locations**
Dream Sequence: Florida Vacations in a Flash
[Read More >](#)

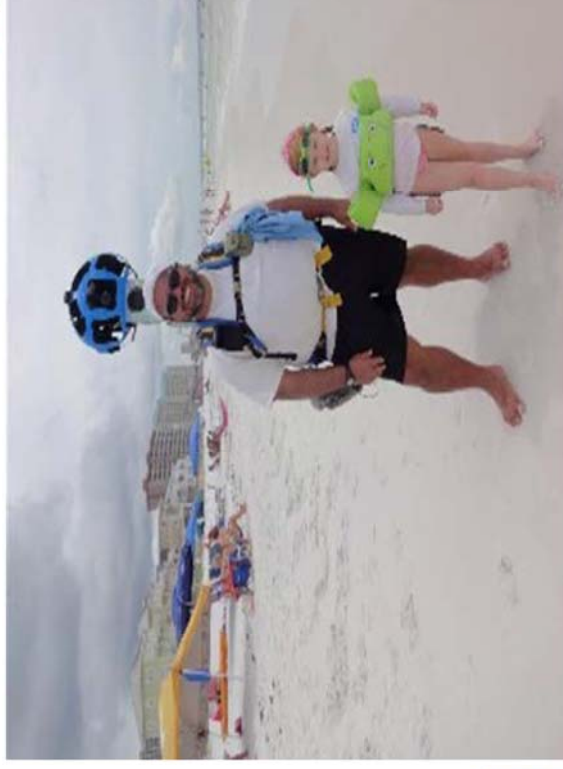
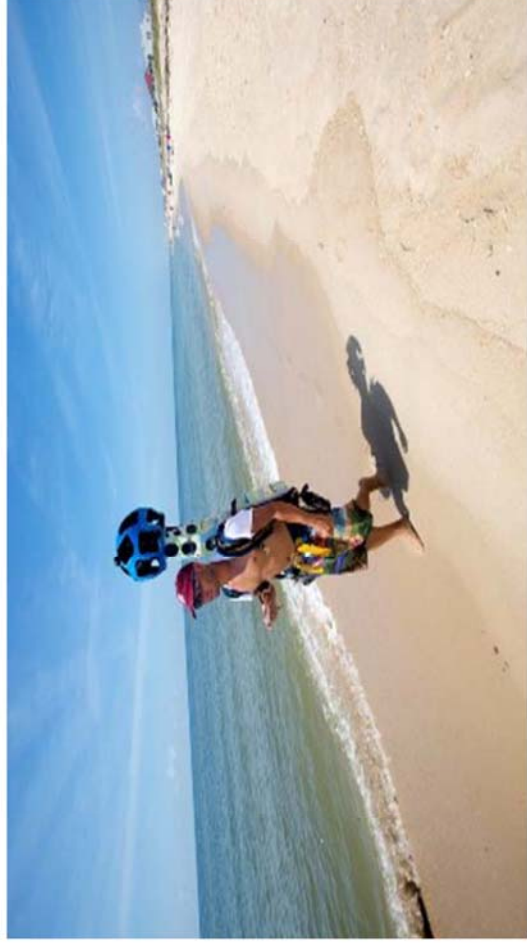
Limited-Time Deals
Exceptional offers, sunshine-savvy newsletters and conversations with friends who #LoveFL

An Irresistible Attraction.
The Florida Keys & Key West
Come as you are

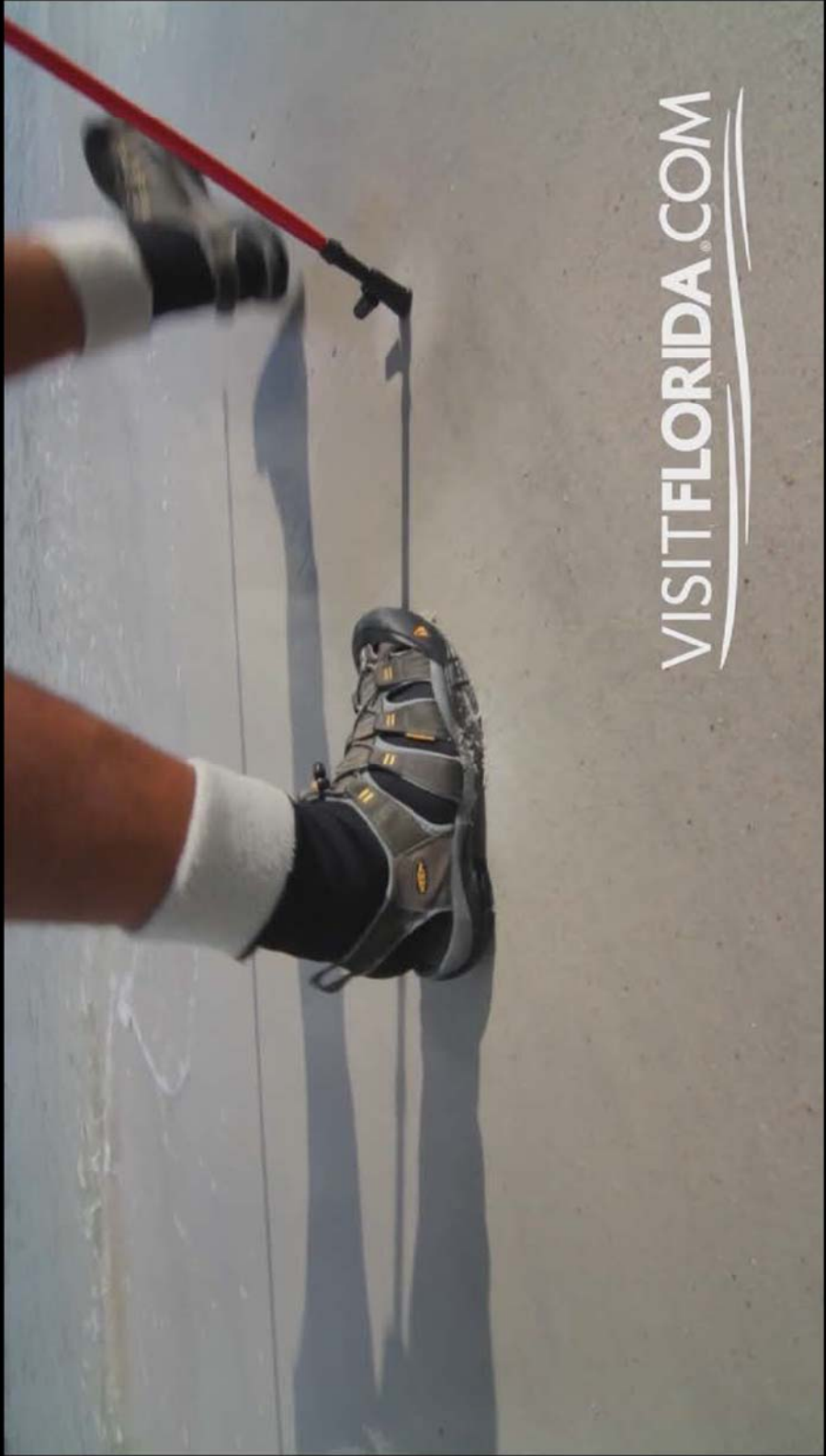
There's a lot to love about Florida.

GOOGLE BEACH TREKKER

- Partnership with Google Maps
- Google's Street View Trekker technology to capture 360-degree photos across 825 miles of beaches



- Launched on July 24
- 50 miles of beaches per week over the next four months



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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
 - Google Trekker initiative
 - Additional **\$2M** in International marketing
 - Additional **\$750K** for Air Lift grants to increase lift to FL
 - 2020 Plan Research – **\$250K**





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Fall 2013 Campaign

**Long-Range
Financial Outlook**

Transportation & Economic Development Appropriations

**Long-Range Financial Outlook
Major Drivers for
FY 2014-15 through 2016-17**

September 24, 2013

Long-Range Financial Outlook

Article III, Section 19(c)(1), Florida Constitution

- The Florida Constitution states that no later than September 15 of each year, the joint legislative budget commission shall issue a long-range financial outlook setting out recommended fiscal strategies for the state and its departments and agencies in order to assist the legislature in making budget decisions.
- The long-range financial outlook must include major workload and revenue estimates.
- Section 216.012(1), Florida Statutes, states that the commission shall develop a long-range three-year financial outlook.

Budget Drivers

- Critical Needs are mandatory increases based on estimating conferences and other essential items. The **eighteen** Critical Needs drivers represent the minimum cost to fund the budget without significant programmatic changes. For the General Revenue Fund, the greatest burden occurs in FY 2015-16.
- The **twenty-five** Other High Priority Needs drivers represent a conservative approach to issues that have been funded in most of the recent budget years. Unlike the Critical Needs, the greatest General Revenue burden occurs in the first year.

DOLLAR VALUE OF CRITICAL AND OTHER HIGH PRIORITY NEEDS

	Fiscal Year 2014-15	Fiscal Year 2015-16	Fiscal Year 2016-17
GENERAL REVENUE FUND			
Total Tier 1 - Critical Needs	408.2	623.3	283.8
Total - Other High Priority Needs	455.7	321.7	248.3
Total Tier 2 - Critical and Other High Priority Needs	863.9	945.0	532.1

Long-Range Financial Outlook Major Drivers

Transportation & Economic Development

Fiscal Year 2014-15					
Issue	Total GR	Recurring GR	NR GR	Trust	Issue Description
Department of Transportation Adopted Work Program (Fiscal Years 2014-2018)	0.0	0.0	0.0	7,238.8	The Department develops a list of transportation projects planned for the following five years, and this funding represents the first year of funding. Funding to support the program comes from a variety of sources, including federal, state, local and toll collections; and funding projections are based on estimates from the March 2013 Revenue Estimating Conference for transportation and documentary stamp tax revenues, and the July 1, 2013, Adopted Work Program.
State Capital Outlay - Agency (Life Safety)	0.0	0.0	0.0	4.1	This is projected funding for environmental site restoration and capital renewal projects (repairs, replacement, renovations affecting critical life, health or safety concerns etc.) at DOT facilities around the state.
Economic Development and Workforce Programs	8.2	0.0	8.2	108.0	The Dept of Economic Opportunity, working with Enterprise Florida, develop and implement economic development policy. Economic development activities include: marketing the state as business friendly, providing financial incentives to attract and grow business, offering grants and loans for low-income and rural areas, and granting funding for innovation and research activities.
National Guard Armories and Military Affairs Priorities	13.2	0.0	13.2	0.0	Projected funding is intended to assess, design, and renovate as many armory facilities per year as possible using a prioritized list contingent on the availability of state funding. Additional resources are projected for two community support programs that target at-risk youth and young adults.
Library, Cultural, Historical, and Election Priorities	14.3	0.0	14.3	0.0	The financial Outlook projects funding needs for Dept of State programs, specifically for Libraries, Cultural and Historical grant programs to preserve these resources, and anticipated costs associated with state election litigation costs or advertising constitutional amendments.
Total	35.7	0.0	35.7	7,350.9	

