



Economic Development & Tourism Subcommittee

Wednesday, January 23, 2013
3:00 PM – 5:00 PM
12 HOB

Action Packet

COMMITTEE MEETING REPORT
Economic Development & Tourism Subcommittee
1/23/2013 3:00:00PM

Location: 12 HOB

Summary: No Bills Considered

Committee meeting was reported out: Wednesday, January 23, 2013 4:55:52PM

COMMITTEE MEETING REPORT
Economic Development & Tourism Subcommittee

1/23/2013 3:00:00PM

Location: 12 HOB

Attendance:

	<i>Present</i>	<i>Absent</i>	<i>Excused</i>
Carlos Trujillo (Chair)	X		
Ben Albritton	X		
Bruce Antone	X		
Karen Castor Dentel	X		
Neil Combee	X		
Dane Eagle	X		
Matt Hudson	X		
Travis Hutson	X		
Elizabeth Porter	X		
Betty Reed	X		
Hazelle Rogers	X		
Jimmie Smith	X		
Clovis Watson, Jr.	X		
Totals:	13	0	0

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COMMITTEE MEETING REPORT
Economic Development & Tourism Subcommittee

1/23/2013 3:00:00PM

Location: 12 HOB

Presentation/Workshop/Other Business Appearances:

Clendenning, Tom (Lobbyist) (State Employee) - Information Only
Department of Economic Opportunity
Caldwell Building
Tallahassee FL 32399
Phone: 850-245-7499

BP Oil Spill Claims
Juneau, Patrick (At Request Of Chair) (General Public) - Proponent
Deepwater Horizon Claims Center
935 Gravier St., Ste 1905
New Orleans LA undefined
Phone: 985-507-7457

CDBG Proposed Legislation/ DEO Proposed Legislation
Reecy, Ken (State Employee) (At Request Of Chair) - Information Only
Department of Economic Opportunity
107 East Madison Street
Tallahassee FL 32399
Phone: 850-717-8436

International Trade and Development
Mencia, Manny (At Request Of Chair) - Information Only
Enterprise Florida
325 John Knox Road
Tallahassee FL 32303
Phone: 850-298-6632

Visit Florida
Secombe, Will (At Request Of Chair) - Information Only
President/CEO, VISIT FLORIDA
2540 W. Executive Center Cr
Tallahassee Florida 32301
Phone: 850-205-3802

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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

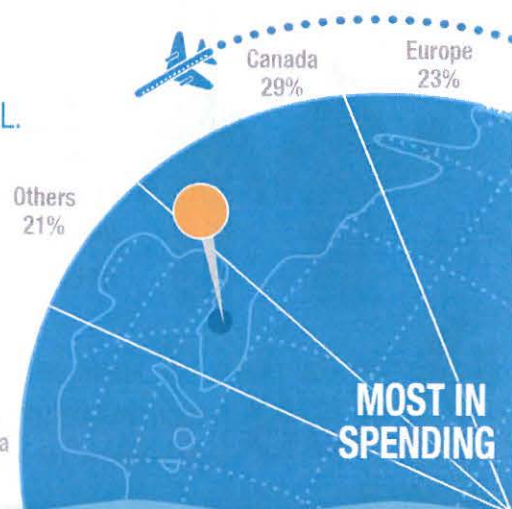
Germany **341** K

France **307** K

Colombia **306** K

Spain **292** K

South America
27%



TOURISM IMPACT ON FLORIDA'S ECONOMY

In 2011, tourism resulted in

\$67.2 BILL.

In spending

+

1+ MILL.

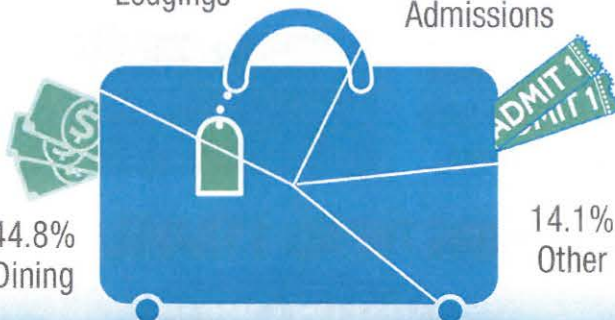
Jobs, 1 per every 85 visitors

24.6%
Lodgings *

16.5%
Admissions

44.8%
Dining

14.1%
Other



Which generated

23%

of sales tax revenues

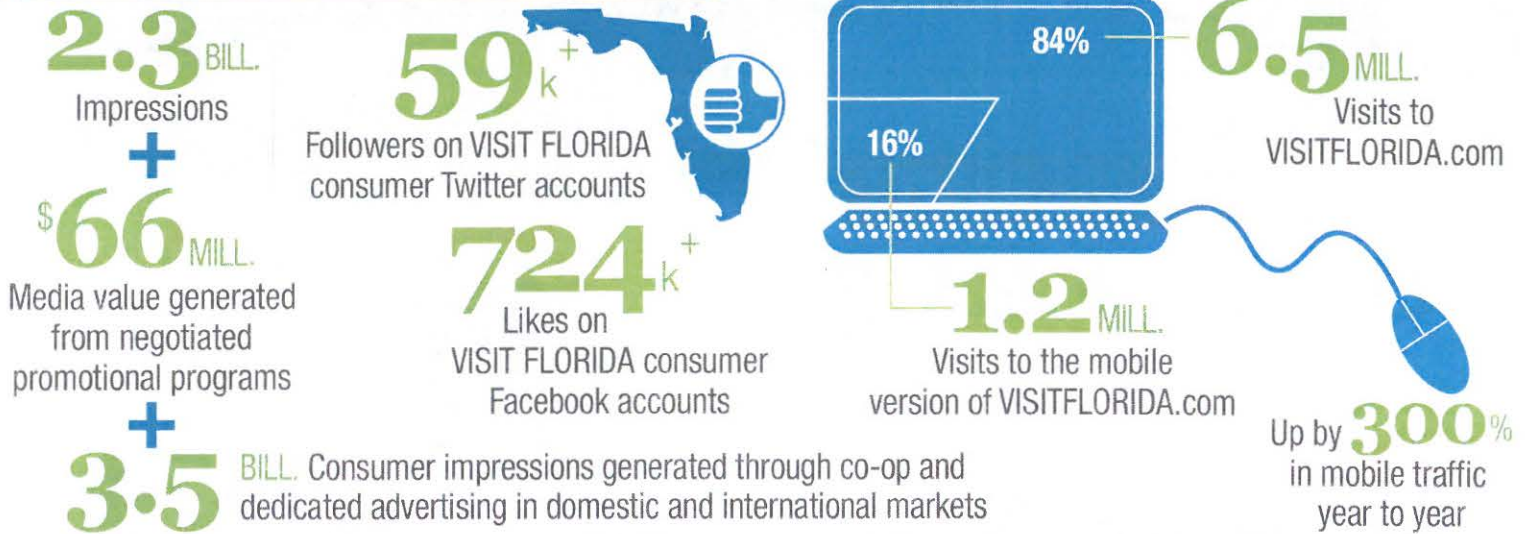
+

\$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 Tourism Indicators Dashboard

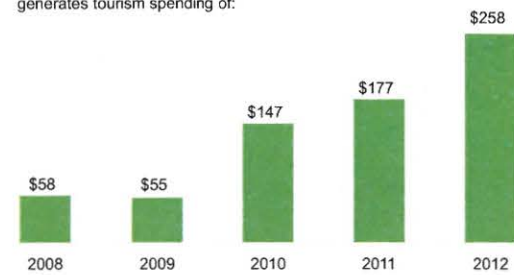
The Official Tourism Marketing Corporation for the State of Florida

VISITFLORIDA

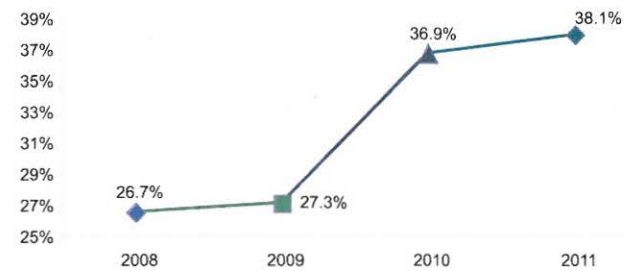
VISIT FLORIDA IMPACT

Economic Impact ROI

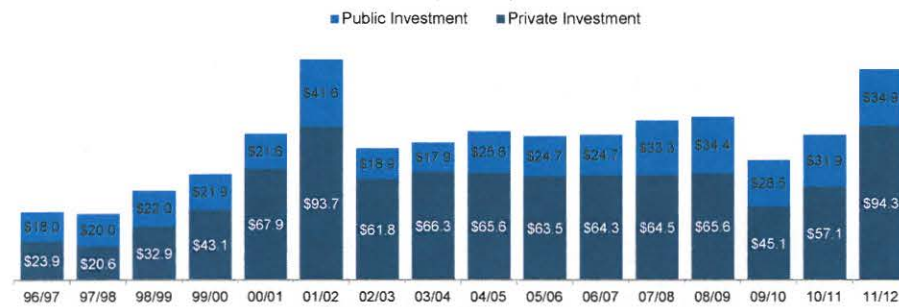
For every \$1 spent on tourism advertising, VISIT FLORIDA generates tourism spending of:



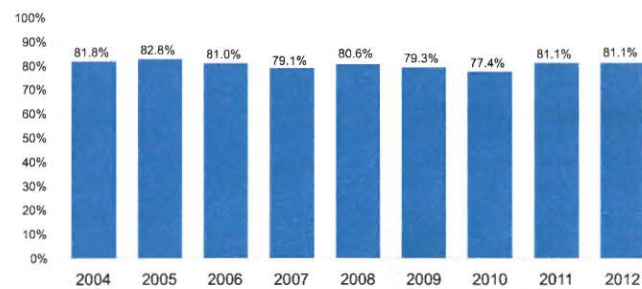
Direct VISIT FLORIDA Influencer ROI: 2008 - 2011



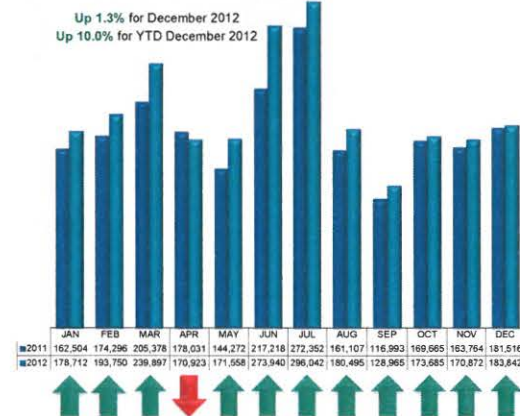
VISIT FLORIDA Total Budget: FY 1996/1997 - FY 2011/2012



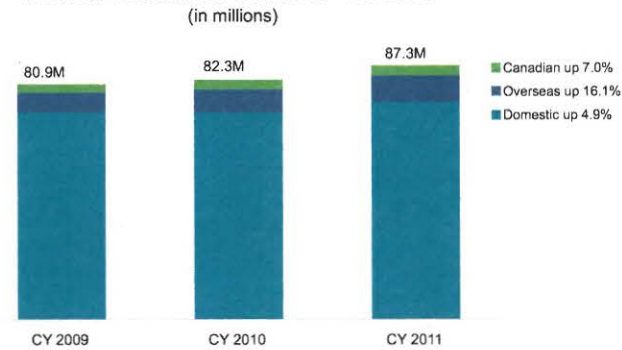
Satisfaction Overall Promoting Tourism to Florida



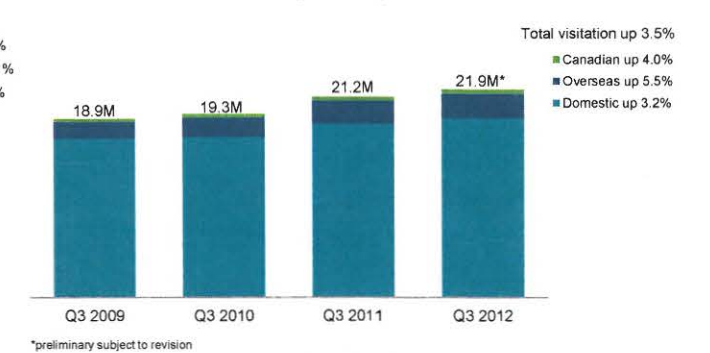
Welcome Center Monthly Traffic Comparison 2012/2011



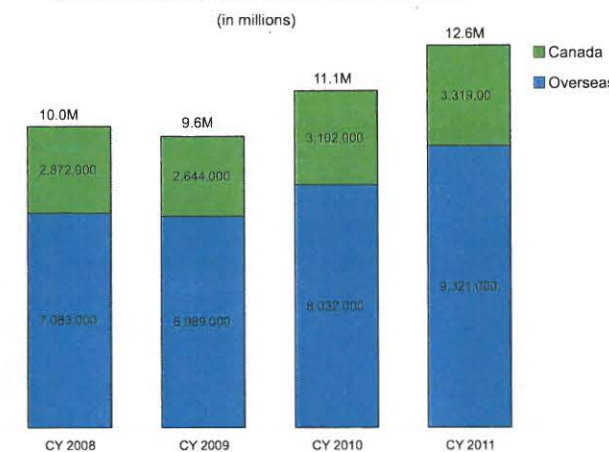
Florida Visitation: CY 2009 - CY 2011



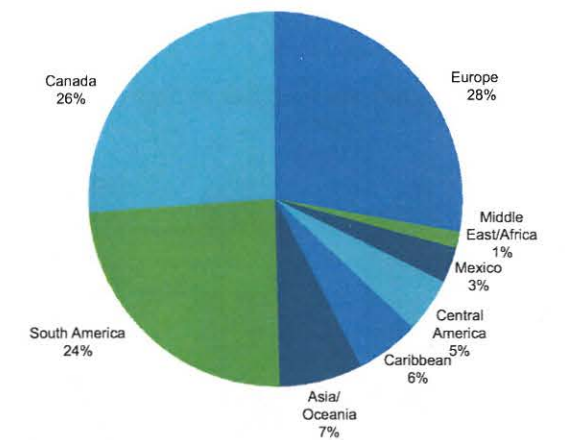
Florida Visitation: Q3 2009 - Q3 2012



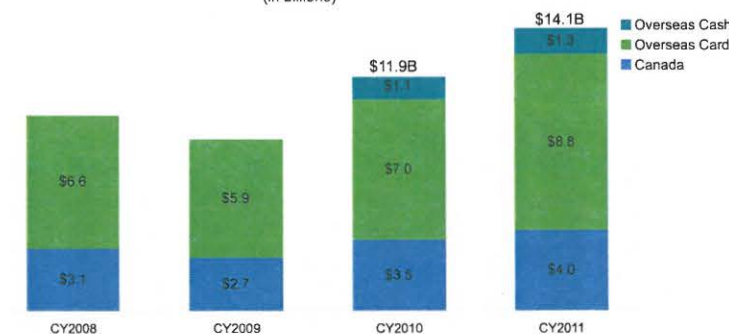
International Visitation: CY 2008 - CY 2011



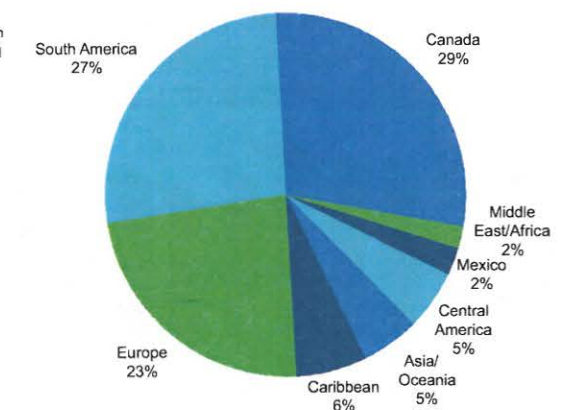
Percent of Total International Visitation by Region: CY 2011



International Visitor Spending: CY 2008 - CY 2011

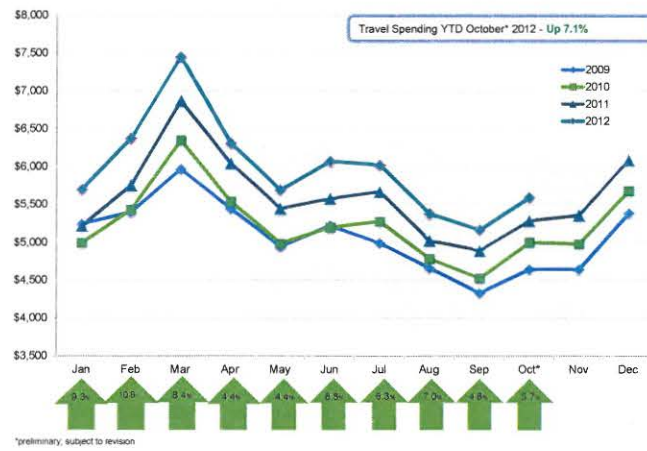


Percent of Total International Spending by Region: CY 2011

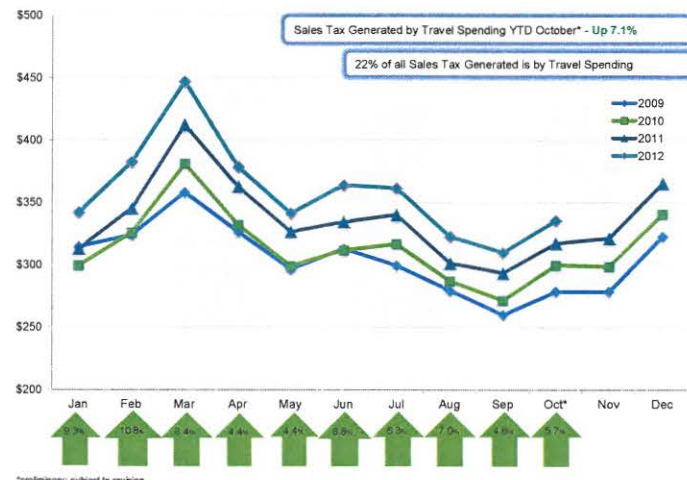


As the Sunshine State's No. 1 industry, tourism was responsible for welcoming 87.3 million visitors in 2011 who spent \$67.2 billion, generating 23 percent of the state's sales tax revenue and employing more than 1 million Floridians. For every \$1 spent on tourism marketing, VISIT FLORIDA – the state's 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.

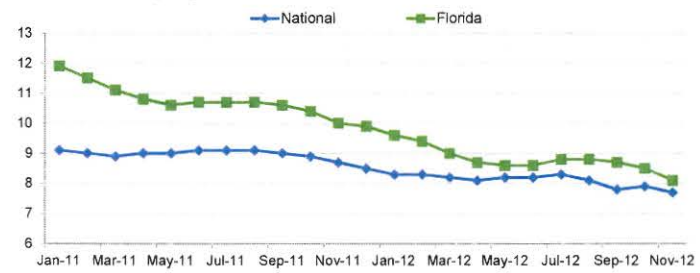
Travel Spending Generated by Month: CY 2009 - October* 2012 (in millions)



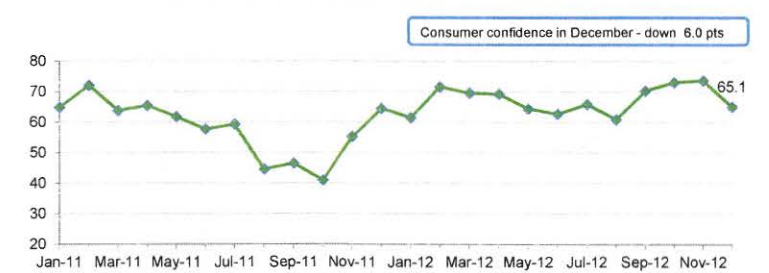
Sales Tax Generated Monthly by Travel Spending: CY 2009 - October* 2012 (in millions)



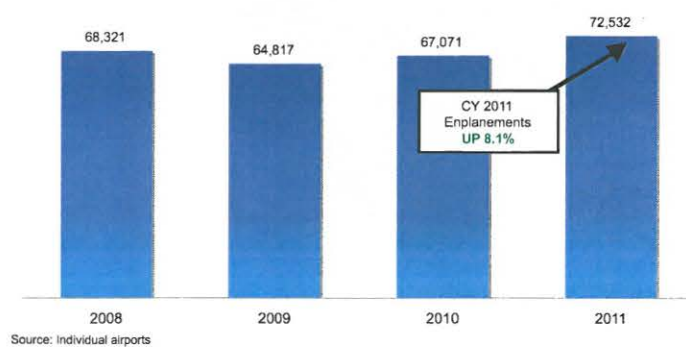
Unemployment Trends: CY 2011 - November 2012



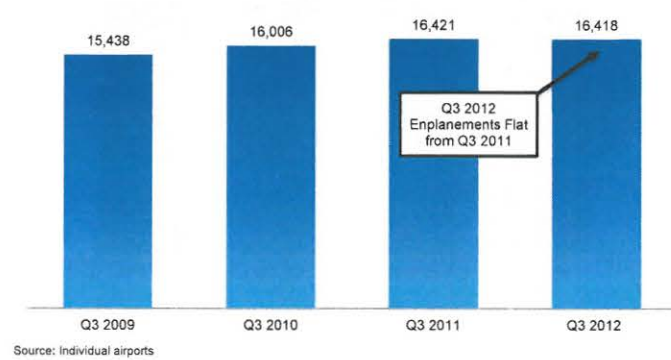
Consumer Confidence: CY 2011 - December 2012



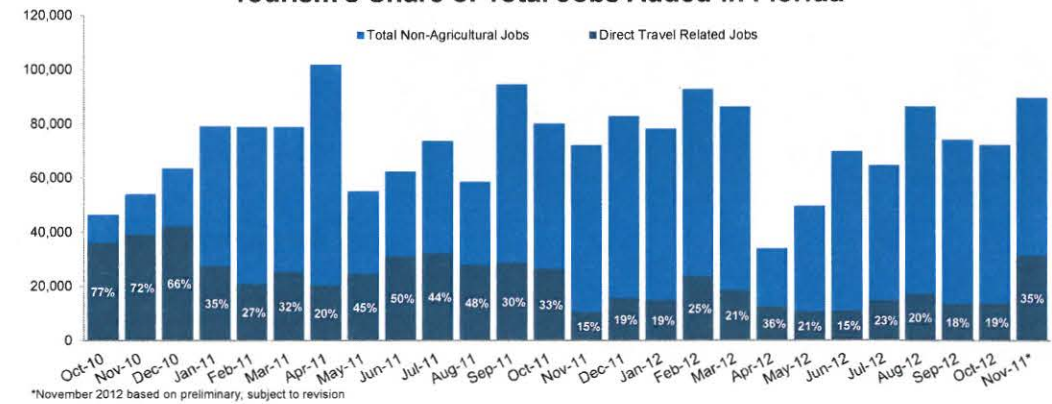
Enplaned Passengers at 14 Major Airports: CY 2009 - CY 2011 (in thousands)



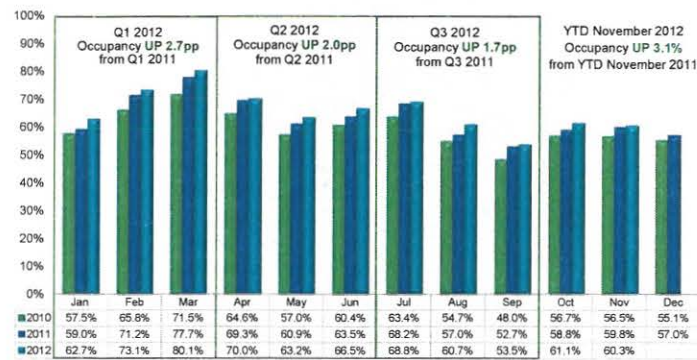
Enplaned Passengers at 14 Major Airports: Q3 2009 - Q3 2012 (in thousands)



Tourism's Share of Total Jobs Added in Florida



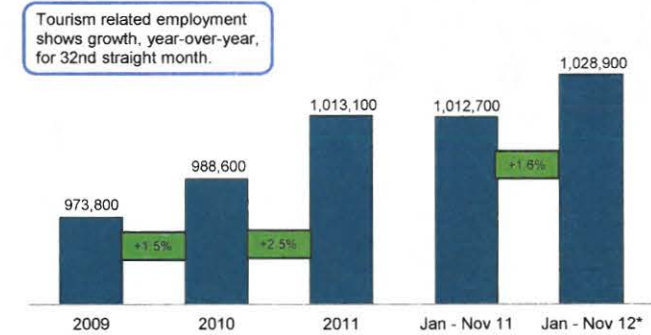
Hotel Monthly Occupancy Trends: CY 2010 - YTD November 2012



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



Tourism Related Employment in Florida



***A running 28-day trend ending December 29th anticipates occupancy to increase 3.0 percent. Source: Smith Travel Research

***A running 28-day trend ending December 29th anticipates ADR in Florida to increase 4.4 percent. Source: Smith Travel Research

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