



Transportation & Economic Development Appropriations Subcommittee

Meeting Packet

**February 11, 2015
3:30 p.m. – 5:30 p.m.
Reed Hall**



The Florida House of Representatives

Appropriations Committee

Transportation & Economic Development Appropriations Subcommittee

Steve Crisafulli
Speaker

Clay Ingram
Chair

February 11, 2015

AGENDA
3:30 PM – 5:30 PM
Reed Hall

- I. **Call to Order/Roll Call**
- II. **Visit Florida Presentation**
Tourism and Marketing Activities
Will Seccombe, President & CEO, Visit Florida
- III. **Space Florida Presentation**
Frank DiBello, President & CEO, Space Florida
- IV. **Defense Support Task Force Update**
Representative Workman, Chair, Florida Defense Support Task Force
Bruce Grant, Executive Director, Florida Defense Support Task Force
- V. **Closing Remarks/Adjourn**

Florida Tourism by the Numbers

Will Seccombe
President & CEO



VISITFLORIDA

VISIT FLORIDA

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

All VISIT FLORIDA programs support the Governor's priorities of job creation
and making sure Florida is a great place to live, work and visit.



VISITFLORIDA

Florida Tourism Has Momentum

- ❖ Tourism-related employment has seen **57** consecutive months of job growth
- ❖ **Three** consecutive years of record visitation
 - **93.7** million visitors in 2013
 - **91.5** million visitors in 2012
 - **87.3** million visitors in 2011
- ❖ Record high visitation for Q1, Q2 & Q3 2014
 - **26.3** million visitors in Q1
 - **24.0** million visitors in Q2
 - **23.7** million visitors in Q3



Florida Tourism by the Numbers

(Year-to-Date 2014 Indicators)

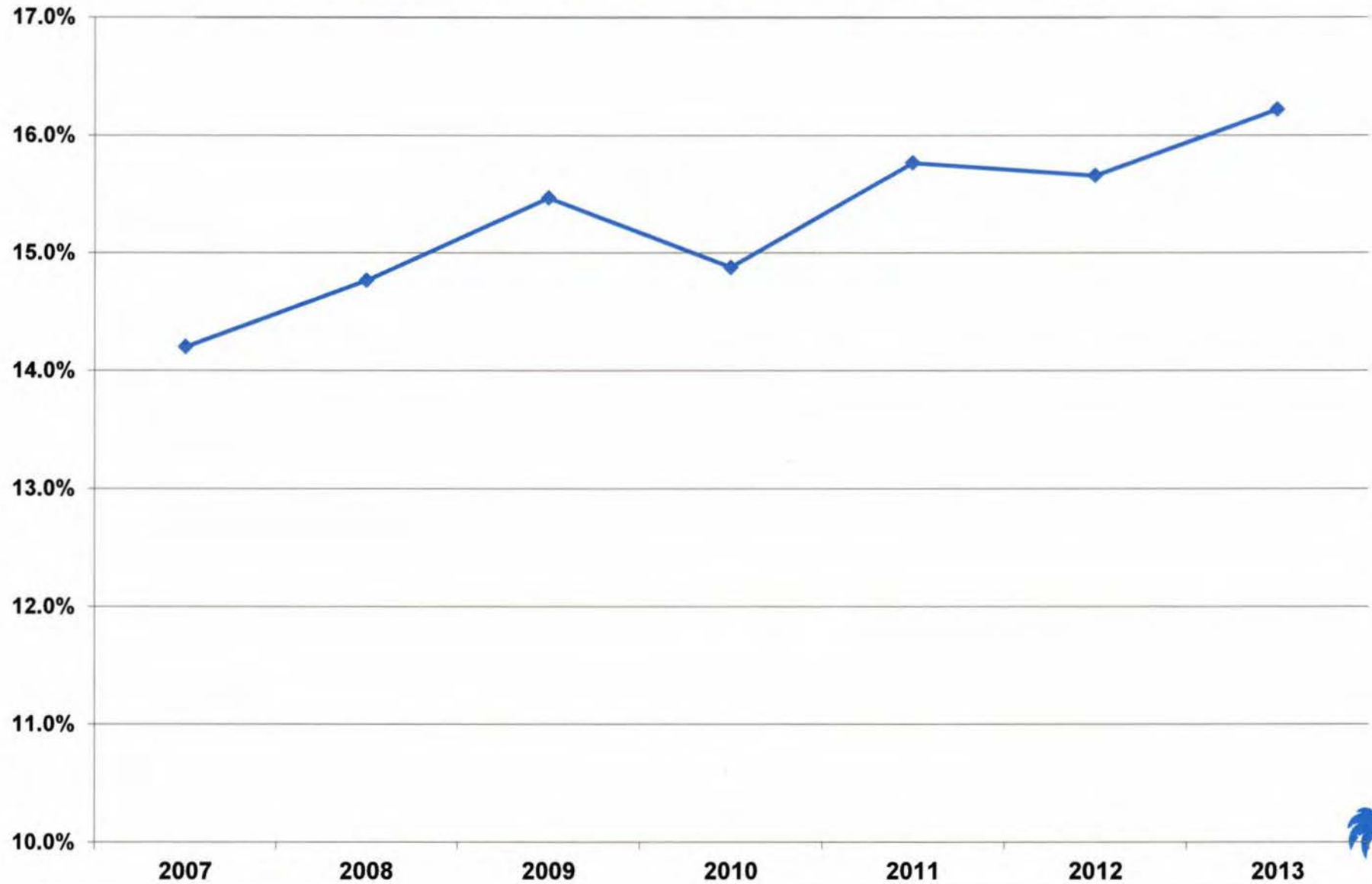
- ❖ \$68.0 B in travel spending YTD October* - **up 7.7%**
- ❖ \$4.1 B in sales tax collections YTD October* - **up 7.7%**
 - 23% of all sales tax generated from travel spending in YTD October* 2014
- ❖ 1,135,700 Floridians employed in 2014* - **up 3.6%**
 - Tourism related employment grew **57** straight months as of December 2014
- ❖ 2014 Hotel average daily rate - **up 5.7%**
- ❖ 2014 Hotel occupancy - **up 4.4%**

*preliminary, subject to change



VISITFLORIDA

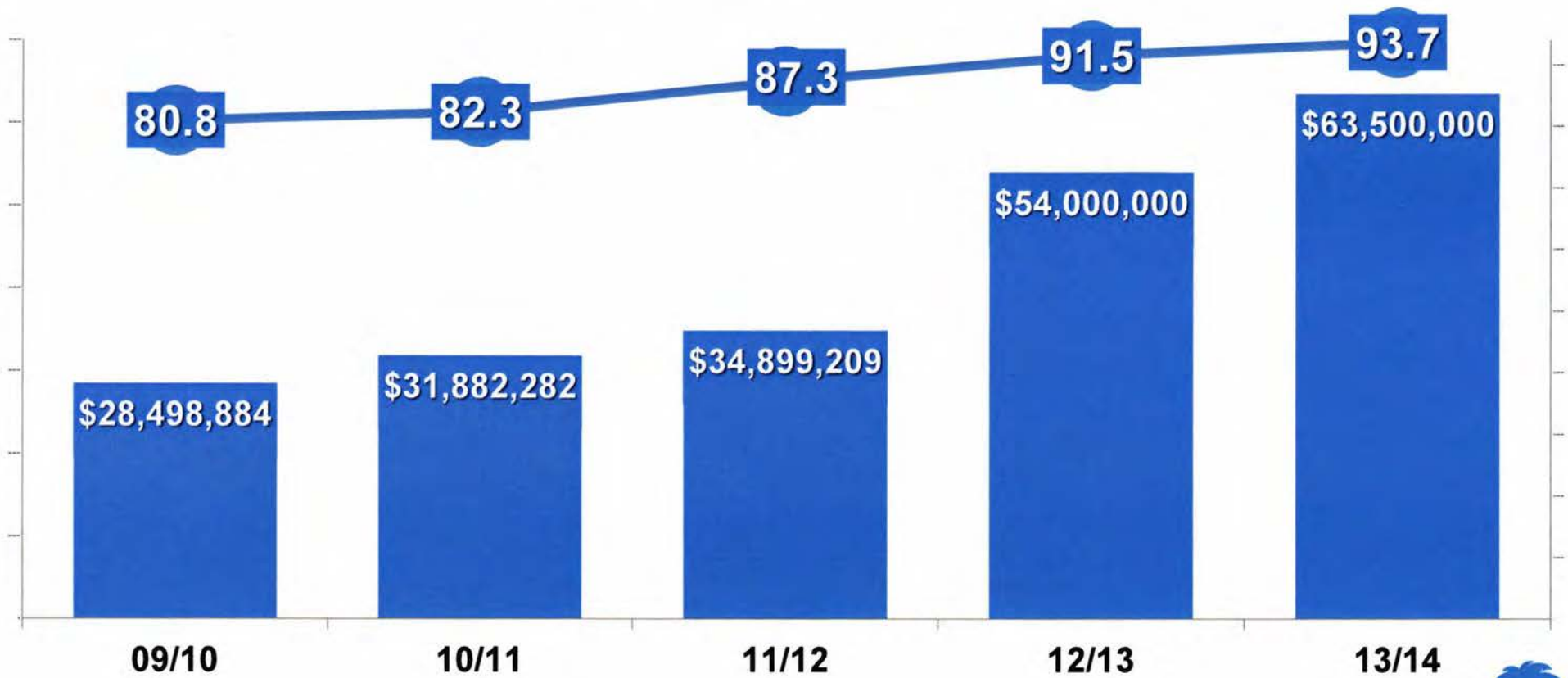
Market Share in Vacations



VISIT FLORIDA Total Budget & Visitation:

(in millions)

■ Public Investment ● Visitation



Return on investment

38% 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 AirTeam 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

- ❖ **\$111.9M** 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**



Expanded Efforts in 2014/15

- ❖ **\$138.5M** budgeted private contribution
- ❖ **\$74M** public funding
 - **\$10.5M** public funding increase over 2013/14
 - **\$5M** for Medical Tourism marketing
 - **\$1.3M** for Florida is for Veterans marketing and research
 - Additional **\$2.2M** in domestic marketing
 - Four major campaigns (Summer, Fall, Winter & Spring)
 - Geographic expansion (21 markets)
 - Additional **\$2M** in International marketing
 - Foundation Five (Brazil, Canada, Germany, Mexico, United Kingdom)
 - AirTeam Florida Grant





VISITFLORIDA®

In Florida, we don't have winter.

VISIT FLORIDA



Florida Beach Finder 75M+ Virtual Beach Views

Use the sliders below to find your beach



ADVENTUROUS LAID BACK

FAMILY FRIENDLY ROMANTIC

ACTION-PACKED SECLUDED

MANICURED AU NATUREL

© 2014 by tripliner



**NATIONAL
GEOGRAPHIC™**

DIGITAL EDITORIAL HUB

EDITORIAL PROMOTIONS

SOCIAL MEDIA

PRINT

PUBLIC RELATIONS



VISITFLORIDA®

Connect via Social Media



[Facebook.com/FloridaTourism](https://www.facebook.com/FloridaTourism)



[Twitter.com/FloridaTourism](https://twitter.com/FloridaTourism)



SunshineMatters.org



VISITFLORIDA®

Contact Us

Will Seccombe
President & CEO
wseccombe@VISITFLORIDA.org
(850) 205-3803

Katie Juckett
Public Affairs Manager
kjuckett@VISITFLORIDA.org
(850) 583-5663



VISITFLORIDA



VISITFLORIDA®



**Space Florida
Presentation**

Space Florida

*Presentation to the
House Transportation & Economic
Development Appropriations Subcommittee*

Frank DiBello, President & CEO

February 11, 2015



Space Florida

***Focus on Aerospace / Space
Industry Growth In Florida***



- ***Authority for Florida's Spaceport System
Infrastructure, Development and Operation***
- ***Economic Development assist to Aviation and
Aerospace Growth / International Trade***



SPACE FLORIDA:

Powers Under Florida Law

- **Space Florida's Enabling Statute - Chapter 331 Part II ...
Spaceport Authority / Aerospace**
- **Empowered to exercise certain powers statewide (e.g.
Conduit Debt and Bond Financing, Other Structures**
- **Empowered to finance/own/lease real estate, Spaceport
and Aerospace infrastructure, machinery & equipment)**
- **May hold rights to intellectual property**
- **Create and update a statewide Spaceport Master Plan**



Major FY-14 Accomplishments

- **Met all State Performance Goals for FY-14, and last five years**
- **Closed 11 Economic Development Transactions**
- **Broadened Financing Network of Banking partners to support statewide financings**
- **Focused On:**
 - **Securing Key Leases for Infrastructure Assets**
 - **Fulfillment work on Redline and C3PF (Boeing)**
 - **Sponsored several Innovation Grant Competitions, Space Education/Research Events**

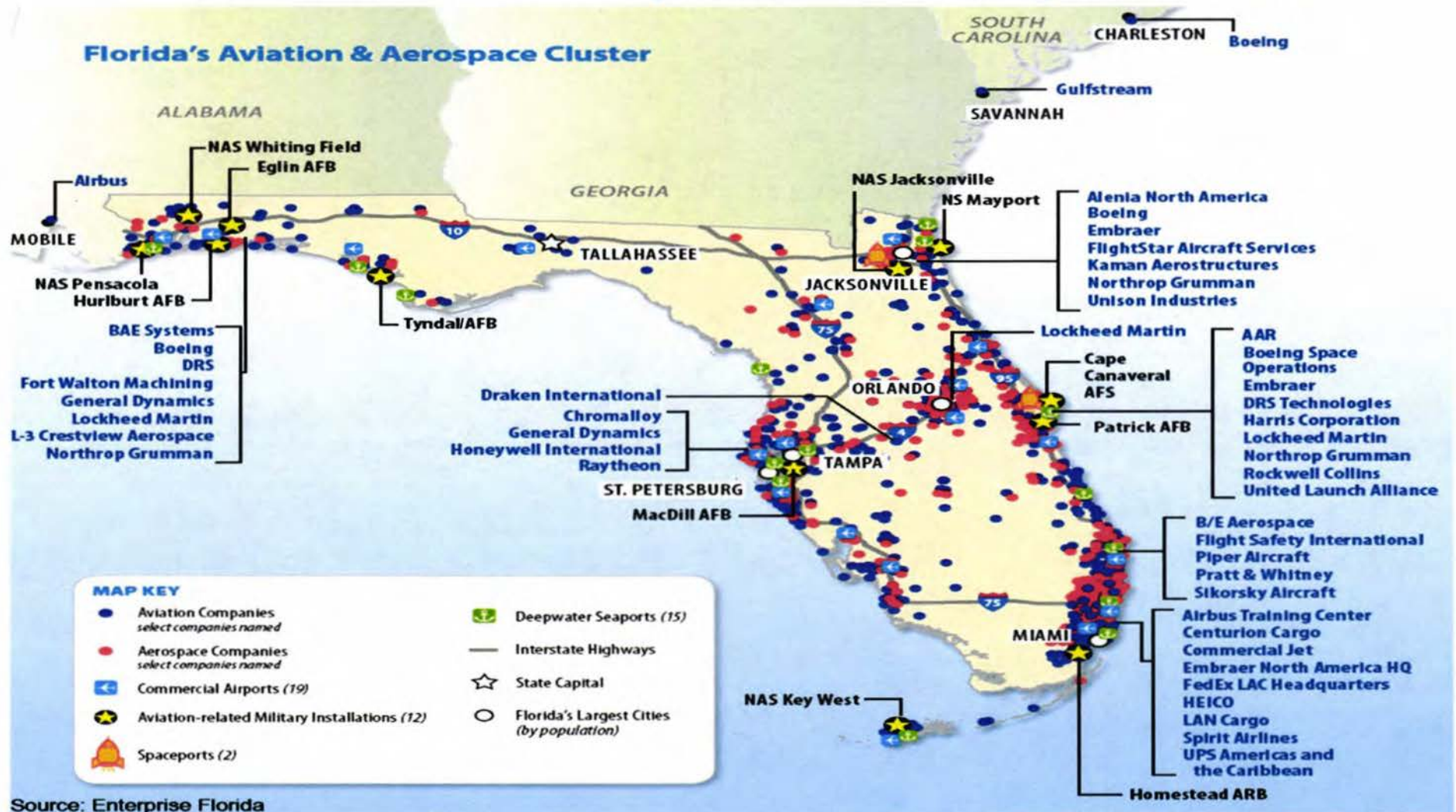


The Space Industry is Transitioning

- *Global Space Industry Revenues from Commercial Sources far exceed Government*
- *Even without Sequestration, Federal Budgets for Space will be severely constrained*
- *Government reliance on the private sector will significantly increase*



Florida's Aerospace Industry Clusters

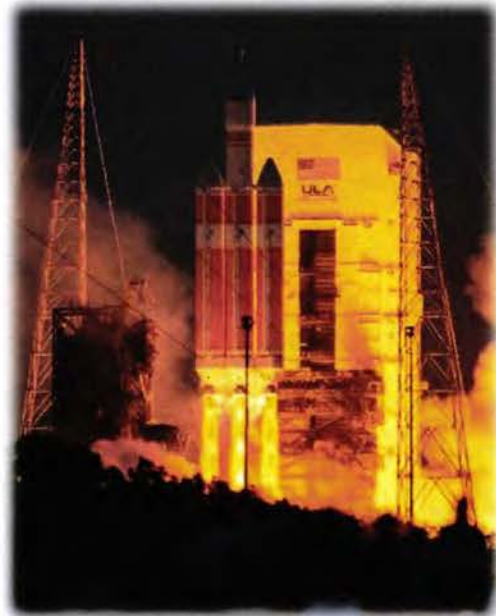


Source: Enterprise Florida



Key Project Example - Orion Capsule Launch

- NASA's Orion Capsules processed in facility refurbished by Florida in 2008
- 300+ direct jobs
- Established capsule assembly and checkout in Florida
- December 5th launch from Complex supported by SF Financing



Key Project Example

Strategic Weapon System Ashore Progress

- Navy Program for Land Based Testing of Submarine Missile Systems
- Reactivates old Navy complex
- Consolidates multiple locations to Florida
- 80-year program life
- Multiple contractors and vendors to Navy for long-term program



Project Magellan (Northrop Grumman)



- **Announced March 7, 2014**
- **To be Located at Melbourne International Airport**
- **1800 Jobs Potentially @ \$100K**
- **\$500m+ Capital Investment in 8 Advanced Manufacturing Facilities**
- **Construction has commenced on first facility; hiring underway**



Florida Spaceport System Plan Goals

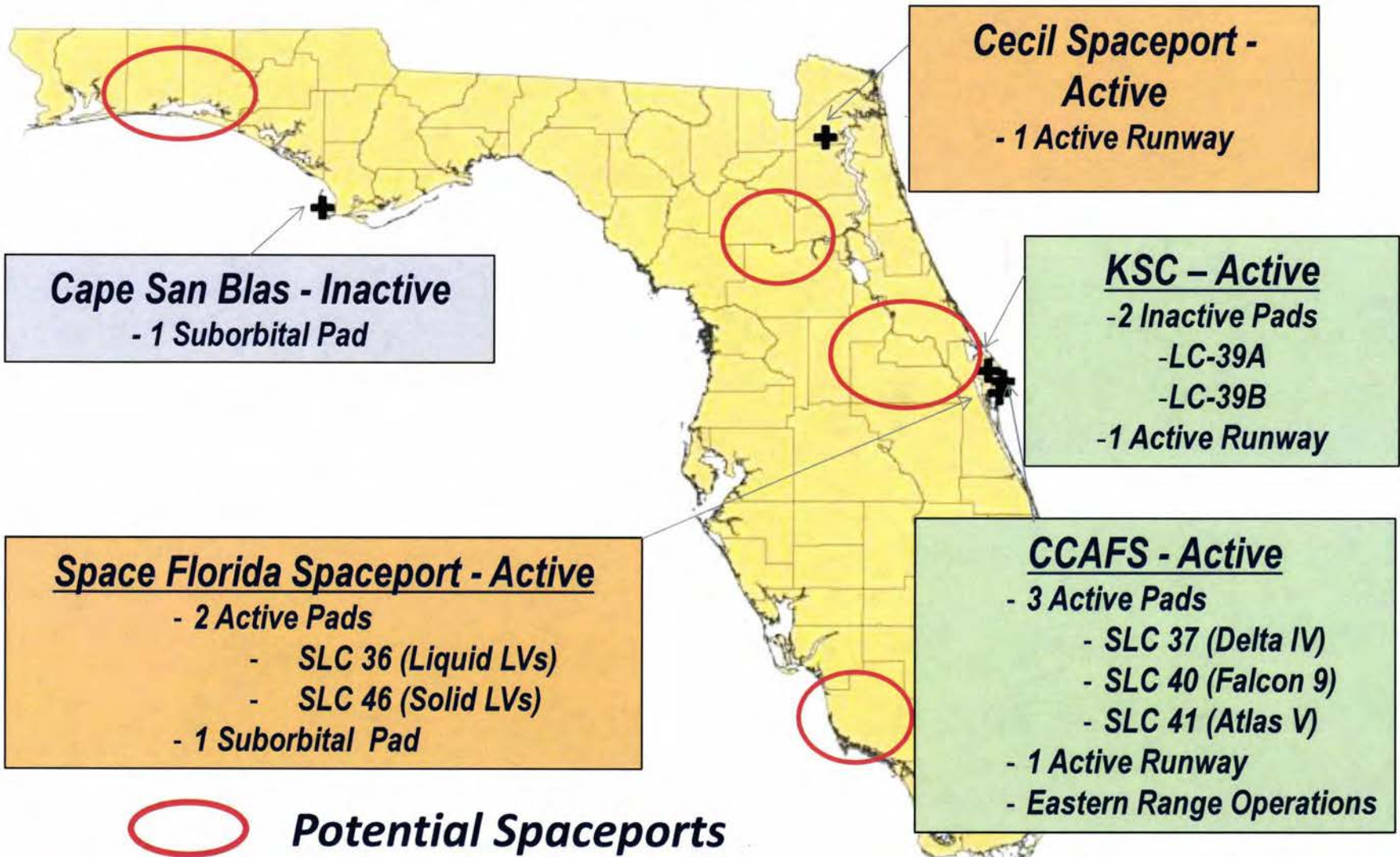


- *Create a stronger economy where Florida's spaceports and aerospace businesses can thrive*
- *Guide public and private investment into emerging and growing aerospace enterprises and maximize the use of existing aerospace resources*
- *Enrich our quality of life while providing responsible environmental stewardship*
- *Advance a safer and secure spaceport transportation system for residents, businesses, and others*

Florida Spaceport Master Plans



Florida's Spaceport Network



RECENT INDUSTRY HAPPENINGS

- ***Cape Canaveral Spaceport
2014 & 2015***

- 25 US Orbital Launches

- ***18 Orbital Launches from Florida***

- *Falcon 9 – 7*
- *Atlas V – 7*
- *Delta IV – 4*

- ***First Commercial Sub-Orbital
Vehicle Flight tests***
- ***First Flight of Orion Space
Spacecraft***
- ***Next-Gen X-37 Ops begin***

ULA Atlas V



SpaceX Falcon 9



ULA Delta IV Heavy



ULA Delta IV



Ongoing / Completed Projects

FDOT Grant Projects



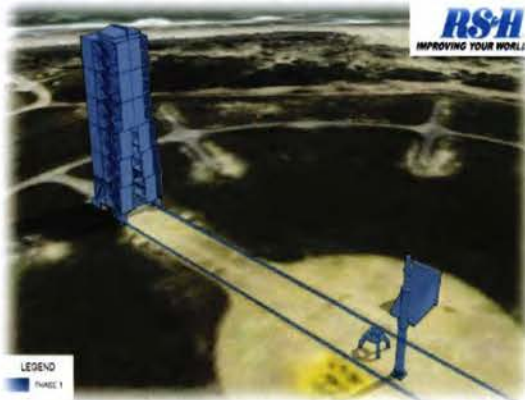
Orbiter Processing Facility 3



Orbiter Processing Facility 1



**Commercial
Heavy Lift**



Launch Complex 46

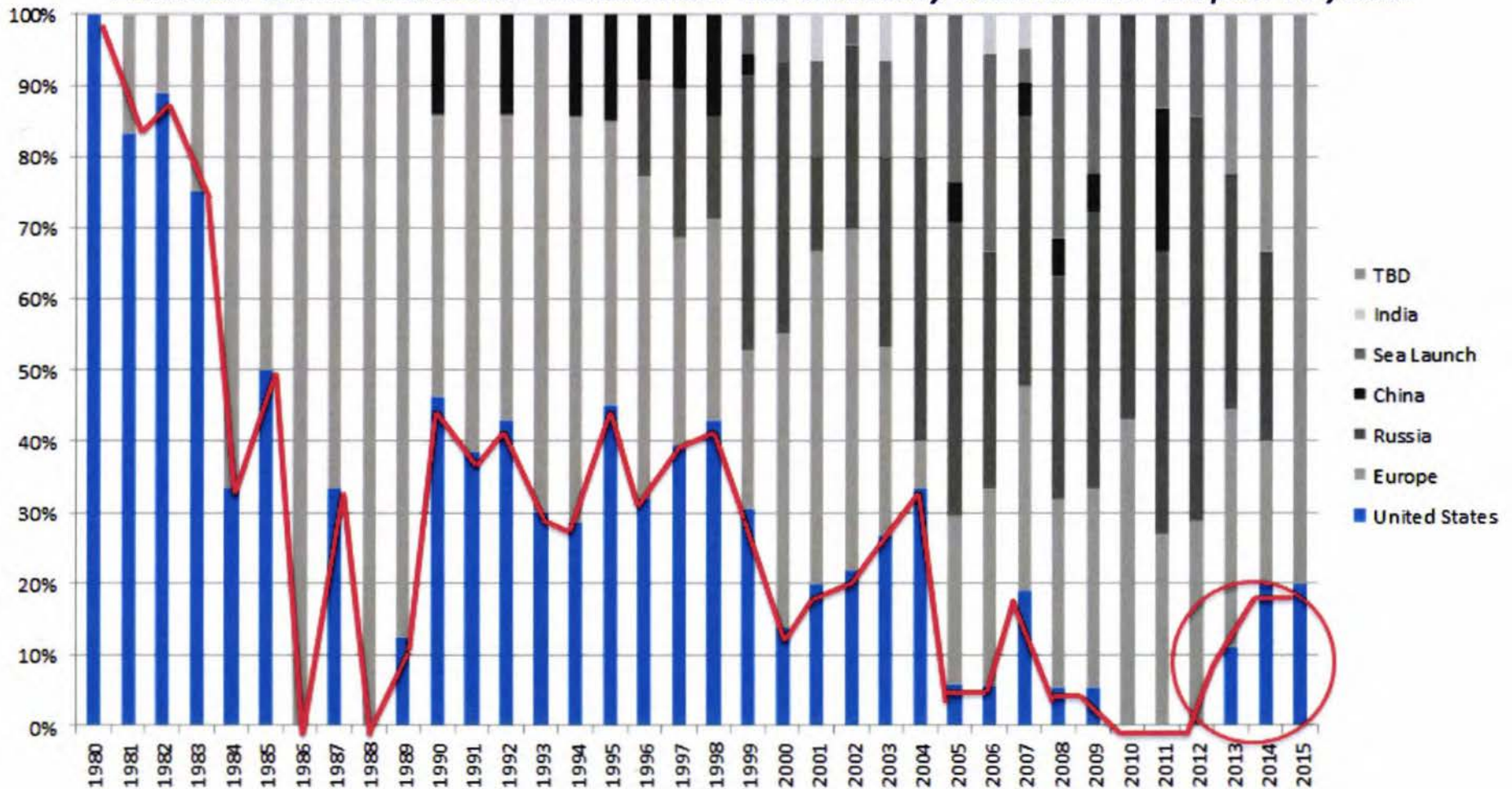


Payload Integration Facility

Why is This Important?

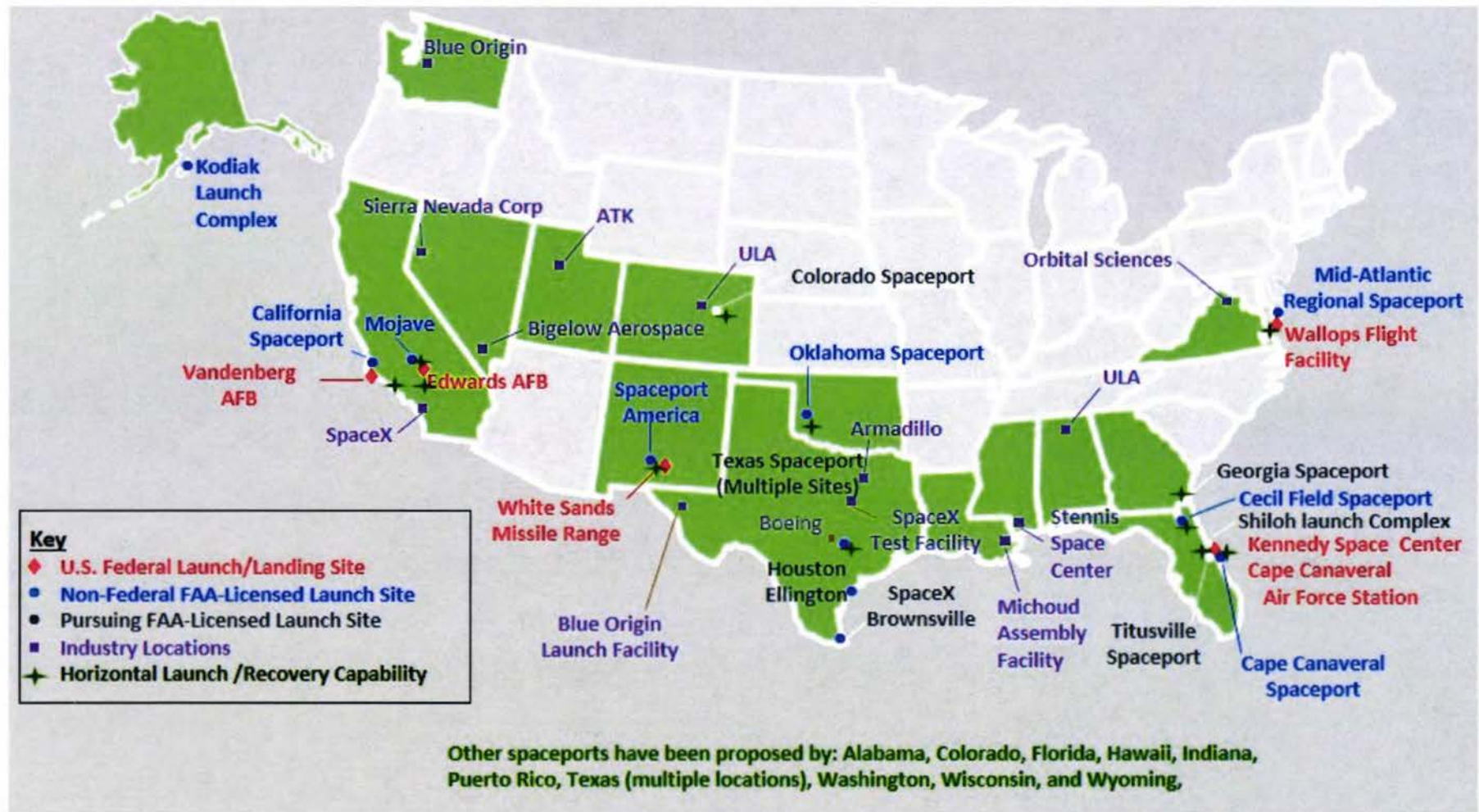
... .. American Space Competitiveness

American commercial launch market share has drastically declined over the past 30 years.



www.spaceflorida.gov

Space Industry Competition



Commercial operators have multiple options outside of Florida.



www.spaceflorida.gov

Governor's FY 15-16 Budget Recommendations

	2015-16 Budget Recommendations
MANAGEMENTS AND OPERATIONS	\$10,000,000
SPACE TOURISM AND MARKETING	\$1,500,000
MEMORANDUM WITH ISRAEL	\$1,000,000



Space Tourism Marketing Initiative

- **Goal:** To drive tourism traffic to Florida and KSC;
To brand Florida as a Space Tourism state.

Digital Advertising



New York Kiosks



Chicago Train Wrap



KSC Visitor
Complex Tickets
12% INCREASE
in 2014*



WhereDreamsAreLaunched.com



OVER 197 MILLION IMPRESSIONS
(Overall CPM = \$3.32)



Fireball Run



Interactive
Airport Displays



Visit Florida Co-Op



www.spaceflorida.gov

Space Tourism Marketing Initiative

Plans for 2015

- **Integrated campaign implemented by Paradise Advertising and Marketing Agency**
 - *Paradise* was selected via competitive RFP in 2014 and has updated the Space Tourism Marketing Plan and Campaign Branding strategy.
- **Activity in 2015 will Implement Updated Space Tourism Marketing Plan**
 - **Updated Branding: “Florida and Beyond”**
 - **Media Plan Includes:**
 - *Broadcast*
 - *Digital/Online*
 - *Print*
 - *Cinema Advertising*
 - *Special promotion opportunities*
 - *Social Media*



Team Approach with Our Partners



FLORIDA DEPARTMENT *of*
ECONOMIC OPPORTUNITY



Thank You

Frank DiBello

President & CEO

321-730-5301

fdibello@SpaceFlorida.gov

Sharon Spratt

Senior Director of Government Affairs

850-921-1128

sspratt@SpaceFlorida.gov



**Defense Support Task
Force Update**



Florida Defense Support Task Force

Briefing to House Transportation and Economic
Development Appropriations Subcommittee
February 11, 2015

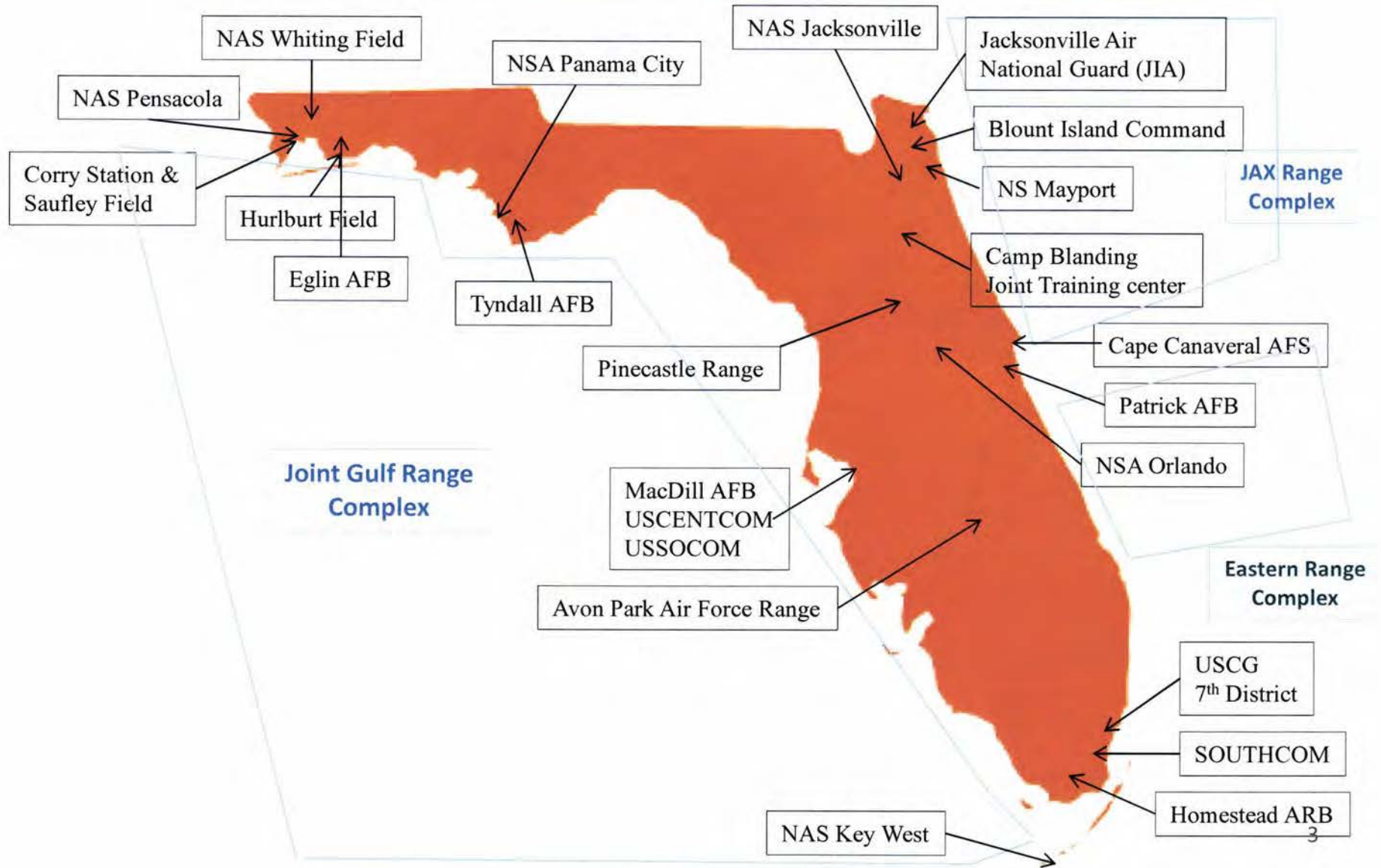


Florida' Military Presence

Overview:

- 20 major military installations.
- \$73.4 billion annual impact from military and defense business presence.
- 758,112 direct and indirect jobs.
- Defense is 3rd largest contributor to state economy.
- Optimum training environment; extensive ranges.

Florida's Military Installations



History

- Task Force created in 2011 --F.S. 288.987. With Sunshine exemption – F.S. 288.985
- Replaced the Florida Council on Military Bases and Mission Support.
- 13 Members -- appointed by Governor, Senate and House.
- First meeting conducted January 2012 – 31 meetings to date

Members

- Rep. Ritch Workman – Chair -- House (New/Returning Member)
- Rep. Clay Ingram– House (New Member)
- BG Chip Diehl -- House
- Dr. Ed Naggiar -- House
- James Montgomerie– Senate (New Member)
- Judge Patt Maney -- Senate
- J.R. McDonald -- Senate
- Tom Neubauer -- Senate
- Rep. Dana Young– Governor’s Personal Rep.
- MG Emmett Titshaw, Adjutant General – Governor
- Barbara Stewart -- Governor
- RADM Kevin Delaney-- Governor
- MG Joseph Taluto -- Governor

Florida Defense Support Task Force

Governor's Guidance:

***“Keep Florida the most
military-friendly state
in the nation.”***

Task Force Mission:

Preserve, protect and enhance Florida's
military missions and installations

Overall role -- Provide administrative and logistical support for the Florida Defense Support Task Force.

Specifically:

- Personnel: Executive Director, Grants Coordinator and Administrative Assistant.
- Organize and support 10 meetings annually.
Coordinate base visits.
- Manage the budget.
- Provide communications support: web site, weekly updates, current military/defense information.

Florida Defense Support Task Force is charged to:

- Maintain and expand the missions of Florida's military installations
- Work with Florida's Base Commanders to prevent encroachment from impacting mission capabilities
 - Improve transportation access to Florida's military installations
- Assist installations in meeting DOD renewable energy goals
- Strengthen state support for military families and veterans with a focus on education, health care, employment, and family programs.

Ongoing Actions

- Aggressive advocacy based on results of installation assessments at both national and state level. Focus on installation-specific needs. Prepare for ongoing defense budget cuts and possible BRAC in 2017.
- **Work with Governor, Legislature, Florida Congressional delegation, base commanders and local defense community leaders to improve military value of all installations.**

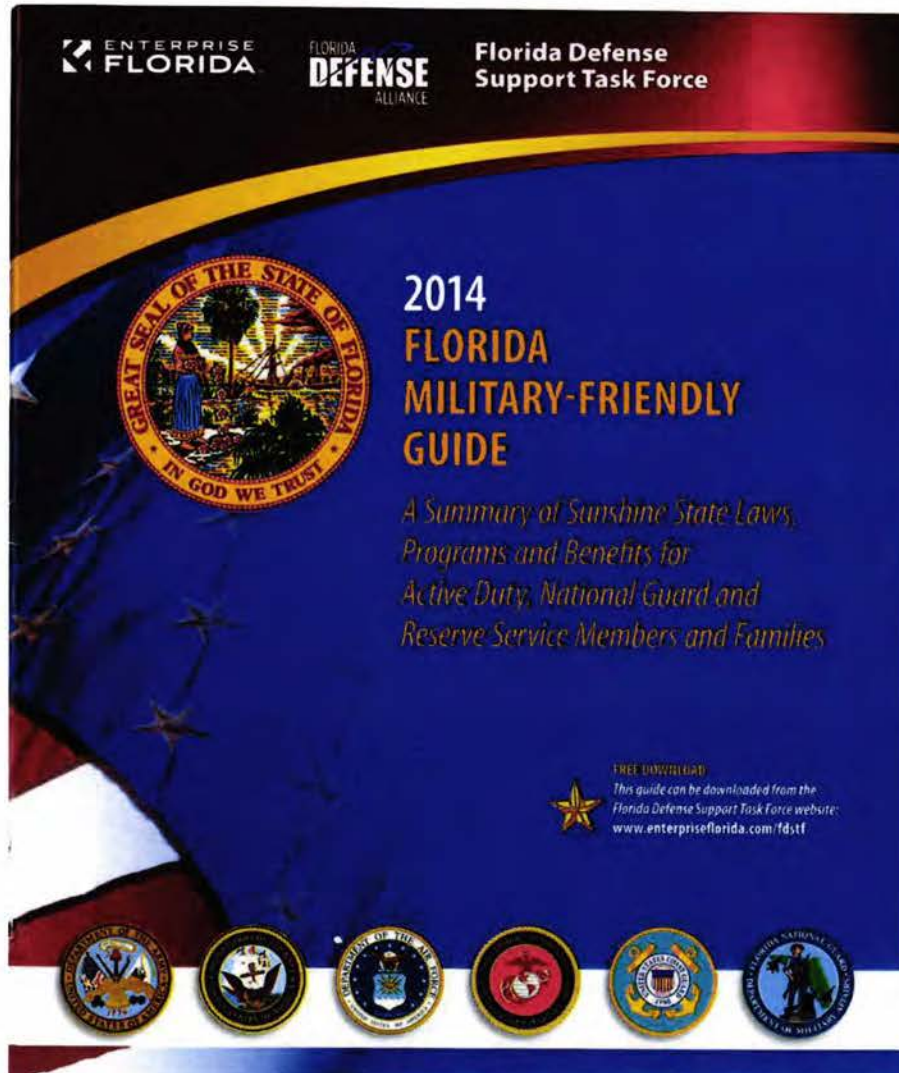
Task Force Successes

- Developed long term strategic plan.
- Conducted comprehensive evaluation and risk assessment of all military installations in the state.
- Contracted for full-time first class advocacy services in Washington, DC to assist efforts in protecting and enhancing Florida military bases.
- Implemented a grant program to assist local defense communities improve the military value of their bases.

Task Force Successes (cont.)

- Established web site and provided members with weekly updates on military and defense issues.
- Published defense fact book and military-friendly guide.
- Supported military-friendly legislation.

2014 Military Friendly Guide



Task Force Appropriations History

FY 2011-2012 funding -- \$5 million.

FY 2012-2013 funding -- \$2 million

FY 2013-2014 funding -- \$4 million

FY 2014- 2015 funding -- \$3.5 million

Total

\$14.5 million

Task Force Budget Utilization

Program Expenditures – FY 2011 - 2015

Grants	\$7.32 Million
The Spectrum Group -- Assessment of All Military Bases	\$1.56 Million
The Principi Group Advocacy -- May 2012 – December 2015	\$3.6 Million
Haas Center Economic Impact Study	\$154,500
The Principi Group -- Linkages and Best Practices Studies	\$129,850
Initial Strategic Planning Session	\$5,000
TOTAL PROGRAM	\$12.77 Million

Task Force Budget Utilization (cont.)

Admin Expenditures – FY 2011 - 2015	
Salaries, travel reimbursements, meeting admin and logistics and printing	\$601,000
TOTAL ADMIN	\$601,000
Task Force Reserve/Funds Available	\$1.13 Million
TOTAL FUNDS REMAINING / AVAILABLE	\$1.13 Million
GRAND TOTAL	\$14.5 Million

Task Force Grant Award History

FY 2013 -- 9 grants -- \$ 2.41 million

FY 2014 -- 9 grants -- \$ 2.22 million

FY 2015 -- 14 grants -- \$ 2.69 million

Total \$ 7.32 million

Recent Military Friendly Legislation

- Florida GI Bill -- \$7 million for Non-Conservation Base Buffering Program
- Late Voter Registration for Deployed Military Members
- Interstate Compact for Military Children
- Licensure accommodations for military family members
- Driver's license extensions for FL military while out-of-state
- In state tuition for all military veterans

Strengthening FL Military – Two Studies

1. Linkages Study – Identifies the connectivity, interdependent functions and linkages between and among Florida’s military installations and missions with the goal of clarifying and graphically portraying the Florida Federal Military Complex.
2. Best Practices Study – Determines state and local best practices from selected US states and communities hosting military installations to protect, sustain and enhance military bases and missions.

Both studies being finalized; should be ready by mid-Feb.

Florida Defense Support Task Force

Questions ?



Florida Defense Support Task Force

Briefing to House Transportation and Economic
Development Appropriations Subcommittee
February 11, 2015

