

Enterprise Florida, Inc.

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# ANNUAL REPORT

2017/2018

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# Rick Scott

*Governor, Chairman, Enterprise Florida, Inc.*



## 2018: Securing Florida's Future

Dear Friends:

During my eight years as Governor, we have worked every day to make Florida a leader in job creation and grow our state's economy. We have cut taxes by more than \$10 billion, paid down \$10 billion in state debt, reduced burdensome regulations and created a business-friendly environment. Since 2010, Florida businesses have created over 1.6 million private sector jobs, and Florida's annual job growth rate continues to exceed the nation's while our unemployment dropped to the lowest it has been since January 2007. Floridians should be very proud of these accomplishments.

Businesses are continuing to choose Florida as the best place to grow and expand, thanks to our pro-business climate, low taxes, world-class education system and diverse workforce. Over the last eight years, Enterprise Florida and economic development partners throughout our state have worked hard to establish more than 1,000 economic development projects, which have resulted in over \$17 billion in capital investment and over 205,000 new and retained jobs.

It is essential that Florida continue to use all of the economic development tools possible to encourage more businesses and job creators to locate and grow here in Florida. Maintaining this path forward will mean jobs for our children and grandchildren and economic success for all Floridians.

Sincerely,

A handwritten signature in blue ink, which appears to read "Rick Scott". The signature is fluid and cursive.

Rick Scott  
Governor  
Chairman, Enterprise Florida, Inc.

## Operations

Designated the economic development organization for the state of Florida, Enterprise Florida offers an array of services and information to assist new, expanding and relocating American and international businesses. Headquartered in Orlando, Enterprise Florida has offices in Miami and Tallahassee, and has employees co-located within partner organizations throughout the state. International recognition is achieved through the initiatives of Enterprise Florida's 11 foreign offices.

The seven-division organization works collaboratively to strengthen its position as the business recruitment, development and marketing organization for the state of Florida. These divisions include:

- Business Development
- International Trade & Development
- Florida Sports Foundation (Sports Development)
- Marketing and Communications
- Florida Defense Alliance (Military and Defense)
- Minority Business Development
- Administration

VISIT Florida, whose annual report is included as addenda, serves as the Tourism Marketing entity for the state.

By way of this report, Enterprise Florida proudly presents an overview of the activities and operations of each division for fiscal year ending June 30, 2018.

## Accomplishments

In fiscal year 2017-18, Enterprise Florida's Business Development Division worked successfully to establish competitive economic development projects and market Florida as the nation's premier business destination. The Business Development team worked with companies and site selection consultants domestically and internationally, along with its network of stakeholders and partners to tell Florida's business story and encourage job growth in the state, resulting in the establishment of 124 projects. These projects are expected to bring more than 12,000 new private sector jobs to the state, retain more than 3,300 jobs, and invest more than \$1.71 billion. Average wages for the jobs expected as a result of these projects is \$61,420. Additionally, jobs were created in all nine of Enterprise Florida's target industries.

The Foreign Direct Investment team exceeded their goals with nearly 40 projects contributing more than 1,600 jobs and a capital investment of nearly \$94 million. These projects, from all over the world, were established with 86 percent of them coming from Enterprise Florida's network of foreign offices.

The International Trade and Development Division began working with the Florida Department of Agriculture and Consumer Services to transition their Certificates of Free Sale program to Enterprise Florida. A Certificate of Free Sale may be required by a foreign country in order to export goods to that country. Enterprise Florida now provides these Certificates on behalf of the state of Florida. Certificates issued in 2017/18 assisted Florida exporters in generating \$34.5 million in actual and expected export sales. The transition to Enterprise Florida, completed as of the first quarter of FY 2018-19, has significantly increased the number of Certificates processed by EFI. As of October 31, 2018, EFI issued 1,659 Certificates with \$42.7 million reported in export sales.

Under the Florida Export Diversification and Expansion program, 203 trade grants were awarded to help new-to-export companies begin doing business overseas, and more experienced exporters diversify their sales into new markets. Under this program, qualified Florida companies have access to four trade grant programs that cover varying costs of the companies' export promotion and development activities.

Enterprise Florida continued to brand the state through the "Florida | The Future is Here" marketing campaign. The campaign recorded more than 65 million impressions in 2017/18 increasing brand awareness across the nation. These impressions were across digital, print and social media, as well as public relation, media sponsorships and special events. The marketing campaign ran in outlets across the U.S. and internationally, including the Wall Street Journal, Delta Sky, Aviation Week (Farnborough Airshow in London), INC. magazine, Chief Executive and Florida Trend.

Throughout the course of the year, the Enterprise Florida Team hosted special events to continue to promote the competitive advantages of the great state. These events were held in markets across the country, including Savannah, Georgia; Washington, D.C.; San Francisco; New York; and multiple in-state locations.

## Performance Evaluation

### \$712.5 Million

Actual and Expected  
Sales from IT&D's Export  
Development Programs

### 2,338

Florida Companies  
Received Export  
Counseling Sessions

### 34

International Business  
Development Events  
Statewide and Globally

Each year Enterprise Florida, in conjunction with the Florida Department of Economic Opportunity, develops performance metrics to measure the performance of its divisions, and to assess their progress towards meeting objectives.

In fiscal year 2017-18, Enterprise Florida successfully created 15,436 jobs for the state of Florida. Falling short of the goal of 20,000 jobs, EFI identified that the lack of a fully funded incentive toolkit has impacted Florida's ability to win major economic development projects. Florida's incentive toolkit and the rhetoric around it have resulted in uncertainty for company leaders and site selection professionals. This has become a direct factor in the decrease in projects established in the state over the last two years. This trend may continue as other states maintain and increase their incentive programs. Enterprise Florida collaborated with the Department of Economic Opportunity to develop goals that are more realistic for the current fiscal year.

The International Trade & Development (IT&D) Division successfully met and exceeded each of its Performance Measures. Their nationally-recognized trade development services helped small and medium-sized enterprises (SMEs) enter and engage in international markets, leading to the following significant outcomes:

- Florida companies reported more than \$712.5 million in actual and expected sales due to IT&D's export development programs including 11 major overseas trade shows, and 4 trade missions to Israel, Costa Rica, China & Hong Kong, and the first-ever service export mission to Brazil. The Division exceeded its Performance Measure of \$625 million.
- Three-hundred and forty-eight (348) individual companies reported export sales to EFI, beyond the goal of 230.
- Conducted 34 international business development events statewide and globally, with over 500 Florida participants.
- Provided export counseling sessions to 2,338 Florida companies through a network of 6 trade offices around the state, surpassing the benchmark of 2,250 companies. Of those, 1,891 companies were within Enterprise Florida's target-industry sectors.

The organization also exceeded all of its marketing metrics with the "Florida | The Future is Here" marketing campaign. The campaign actively promotes Florida's business advantages and creates awareness among site location consultants and corporate decision makers, both domestically and internationally. In fiscal year 2017-18, the campaign recorded more than 65 million impressions.

## Enterprise Florida's Performance Measures for State Fiscal Year 2017-2018

| Business Development: Proposed Job Creation   | TOTAL         | Performance Standards |
|---|---------------|-----------------------|
| Total number of proposed jobs to be created by businesses assisted by Enterprise Florida  | 15,436        | 20,000                |
| in rural communities  | 398           | 500                   |
| by international businesses   | 1,633         | 900                   |
| with incentives   | 11,018        | 10,000                |
| International Trade   |               |                       |
| Number of Florida based businesses assisted by Enterprise Florida for international trade   | 2,338         | 2,250                 |
| Number of companies with export sales attributable to activities conducted by Enterprise Florida  | 348           | 230                   |
| Amount (US dollar value) of projected export sales attributable to the activities conducted by Enterprise Florida                             | \$712,503,803 | \$625,000,000         |
| Marketing Florida   |               |                       |
| Web traffic to EFI's website (overall traffic in visits)  | 270,011       | 250,000               |
| Positive media hits   | 921           | 700                   |
| Total social media channel followers  | 43,000+       | 21,000                |
| Total media impressions (print, digital, broadcast, out of home)  | 66,544,677    | 33,000,000            |
| Minority and/or Small Business, Entrepreneurship and Capital  |               |                       |
| Number of businesses that received financial assistance   | 10            | 6                     |
| General   |               |                       |
| Satisfaction of businesses served with investment or trade assistance provided by Enterprise Florida  | 98%           | 95%                   |
| Number of strategies in the <i>Florida Strategic Plan for Economic Development</i> being implemented by Enterprise Florida                    | 11            | 11                    |
| Response rate for Business Development/International Trade Development customer satisfaction survey   | 32%           | 25%                   |
| The Florida Sports Foundation   |               |                       |
| Economic contributions to communities as a result of hosting Florida's Senior State Games and Sunshine State Games Championships              | \$11,146,513  | \$7,000,000           |
| Number of participants (athletes and families) competing in and attending Florida's Senior State Games and Sunshine State Games Championships | 49,276        | 40,000                |
| Economic contributions from Florida Sports Foundation sponsored sporting event grants   | \$627,168,530 | \$200,000,000         |
| Number of attendees at the sponsored grant events   | 649,189       | 300,000               |

Reports regarding the Customer Satisfaction Survey and The Florida Sports Foundation are included as Addenda.

## Funding

As a public-private partnership, Enterprise Florida receives funding from private corporations as well as the State of Florida. Through a contractual relationship with the Florida Department of Economic Opportunity, Enterprise Florida must report on its quarterly activities and meet the minimum performance levels to secure the state's operating investment.

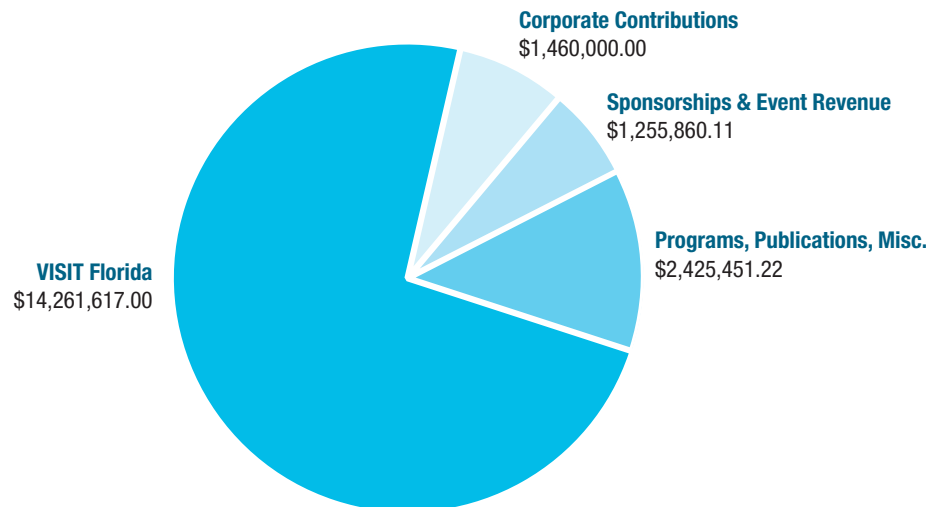
The private sector augments the state's efforts through contributions from a variety of Florida's businesses. Enterprise Florida's investors contribute to the match requirement identified in Florida Statute section 288.904(2)(a). Enterprise Florida is required to raise no less than 100 percent of the state's operating investment. For fiscal year 2017/18 that requirement was \$16,000,000.

Private sector support in operating Enterprise Florida and its divisions includes:

- Cash donations from organizations assisted by the divisions;
- Cash jointly raised by Enterprise Florida, Inc., and a private local economic development organization, a group of such organizations, or a statewide private business organization that supports collaborative projects;
- Cash generated by fees charged for products or services of Enterprise Florida, Inc., and its divisions by sponsorship of events, missions, programs, and publications; and
- Copayments, stock, warrants, royalties, or other private resources dedicated to Enterprise Florida, Inc., or its divisions.

Additionally, VISIT Florida's cooperative advertising dollars, raised through private/corporate contributions, are accepted as match to the states investment.

### Fiscal Year 2017/18 Match Contributions





# Enterprise Florida, Inc.

*Matching Funds for Fiscal Year 2017-2018*

*Through June 30, 2018*

|   |                     |
|---|---------------------|
| <b>1. Corporate Contributions</b>                                 |                     |
| a) EFI Corporate Contributions                                    | \$755,500           |
| b) TMFL Corporate Contributions                                   | \$513,500           |
| c) FSF Corporate Contributions                                    | \$191,000           |
| <b>2. Sponsorships &amp; Event Revenue</b>                        |                     |
| a) EFI Sponsorships & Event Revenue                               | \$973,430           |
| b) FSF Event Revenue/Entry Fees                                   | \$282,430           |
| <b>3. Jointly Raised Funds</b>                                    |                     |
|   | \$ -                |
| <b>4. Programs, Publications, Misc.</b>                           |                     |
| a) State Small Business Credit Initiative Program Fees & Interest | \$366,557           |
| b) Microfinance Program Fees & Interest                           | \$9,399             |
| c) Florida Sports Foundation Miscellaneous Revenue                | \$45,677            |
| d) EFI Administrative Services & Miscellaneous Revenue            | \$83,528            |
| e) Florida Opportunity Fund Interest                              | \$120,974           |
| f) Florida Opportunity Fund Distributions                         | \$1,799,313         |
| <b>5. Private Resources</b>                                       |                     |
|   | \$ -                |
| <b>6. Advertising – Raised Private/Corporate – VISIT Florida</b>  |                     |
|   | \$14,261,617        |
| <b>Total Match</b>  |                     |
|   | <b>\$19,402,928</b> |

## Rural Areas of Opportunity (RAO)

Rural Areas of Opportunity (RAO) are defined as rural communities, or a region composed of rural communities, that have been adversely affected by extraordinary economic events or natural disasters. The Governor, by executive order, designated three RAOs, which established each region as a priority assignment for Rural and Economic Development Initiative (REDI) agencies. The designation also allows the Governor to waive criteria of any economic development incentive including, but not limited to, the following:

- Qualified Target Industry Tax Refund Program
- Quick Response Training Program
- Transportation Projects
- Brownfield Redevelopment Bonus Refund
- Rural Job Tax Credit Program

## Operations & Accomplishments

Rural Florida's regions consist of thirty-two counties that possess an array of untapped resources that are crucial to business relocation and expansion. These communities are primed for development with a seemingly endless supply of affordable land, infrastructure availability, central location and quality of life.

Each region is represented by a Rural and Economic Development Initiative (REDI) agency whose activities champion not only the individual regions, but also the state of Florida as the premier location for business.

In fiscal year 2017/2018, Enterprise Florida collaborated with the rural regions to partake in a program to conduct a Strategic Sites Inventory (SSI), which helped the communities identify ideal Greenfield sites that are suitable for commercial, industrial, or retail development. Over 400 properties were identified during the Strategic Sites Inventory process.

Additionally, representation from Enterprise Florida has been present at several Roundtable Discussions and Board of Directors Meetings. EFI attended and sponsored the **2017 Rural Economic Development Summit** held in Saint Augustine, September 7-8, 2017.

## Marketing Rural Florida

The Rural Florida Marketing Grant was created to expand Enterprise Florida's efforts in marketing Florida as the best place for business and to support rural communities throughout the state.

Activities completed in 2017/2018 were the result of grants awarded late fiscal year 2016/2017.

| Organization  | Grant Amount |
|---|--------------|
| Florida's Heartland Economic Region of Opportunity                    | \$135,000.00 |
| North Florida Economic Development Partnership                        | \$150,000.00 |
| North West Florida Business Development Council (Opportunity Florida) | \$135,000.00 |

## Marketing Accomplishments



### Florida's Heartland Economic Region of Opportunity (FHRO)

- Advertisement in Florida Trend Magazine
- Website Development
- Digital Brochures
- Community Asset Videos



### North Florida Economic Development Partnership

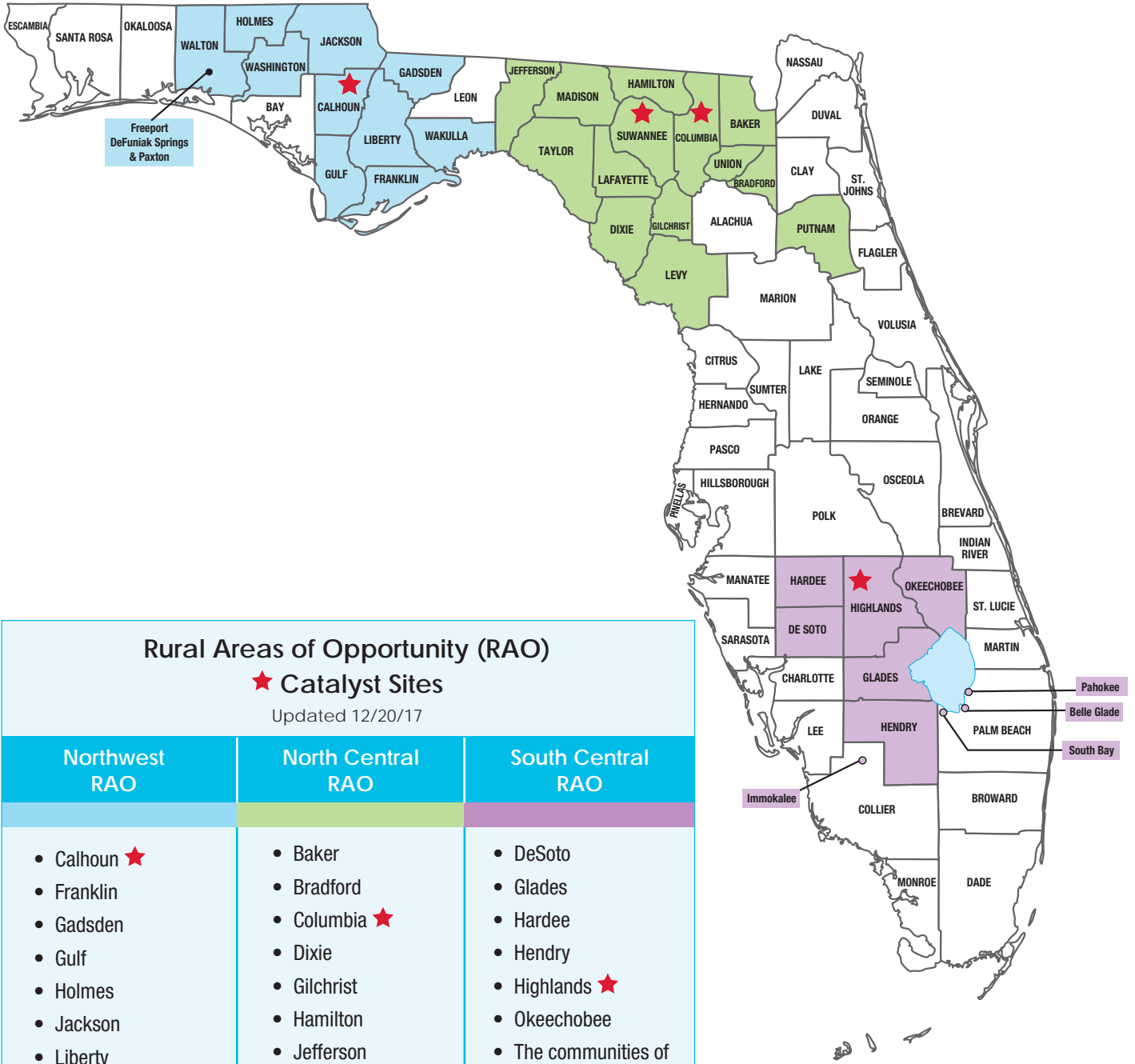
- Experience North Florida Consultant Event
- North Florida Manufacturing Logistics Distribution Corridor Branding
- Priority Site Marketing Strategy and Execution
- Economic Development Academy Revision and Relaunch



### North West Florida Business Development Council dba Opportunity Florida

- Website Development
- Site Consultant/Tradeshow Trip Participation
- Familiarization Tours
- Economic Development Educational Program
- Mega Site Website Expansion
- Intraregional Marketing Video
- North Florida Manufacturing Logistics Distribution Corridor Branding

# Rural Areas of Opportunity (RAO)



| Rural Areas of Opportunity (RAO)   |  |  |
|--|--|--|
| ★ Catalyst Sites   |  |  |
| Updated 12/20/17   |  |  |
| Northwest RAO  | North Central RAO  | South Central RAO  |
| <ul style="list-style-type: none"> <li>• Calhoun ★</li> <li>• Franklin</li> <li>• Gadsden</li> <li>• Gulf</li> <li>• Holmes</li> <li>• Jackson</li> <li>• Liberty</li> <li>• Wakulla</li> <li>• Washington</li> <li>• The area north of the Choctawatchee Bay and Intercoastal Waterway in Walton County including the City of Freeport, DeFuniak Springs and Paxton.</li> </ul> | <ul style="list-style-type: none"> <li>• Baker</li> <li>• Bradford</li> <li>• Columbia ★</li> <li>• Dixie</li> <li>• Gilchrist</li> <li>• Hamilton</li> <li>• Jefferson</li> <li>• Lafayette</li> <li>• Levy</li> <li>• Madison</li> <li>• Putnam</li> <li>• Suwannee ★★</li> <li>• Taylor</li> <li>• Union</li> </ul> | <ul style="list-style-type: none"> <li>• DeSoto</li> <li>• Glades</li> <li>• Hardee</li> <li>• Hendry</li> <li>• Highlands ★</li> <li>• Okeechobee</li> <li>• The communities of                             <ul style="list-style-type: none"> <li>- Pahoee</li> <li>- Belle Glade</li> <li>- South Bay</li> <li>- Immokalee</li> </ul> </li> </ul> |

# BOUNDLESS OPPORTUNITIES

**RURAL FLORIDA IS A 28-MILLION-ACRE BLANK CANVAS.  
WHICH PAINTS A PRETTY NICE PICTURE FOR YOUR BUSINESS.**

Florida's rural areas truly are the heart of the state. Close to big cities, yet far enough away for the open space you need. And with a robust talent pool, plenty of training opportunities and community leaders who will welcome you with open arms, you'll see why it's a pleasure doing business here. **Discover what a future in Florida means for your business at [floridathefutureishere.com/opportunities](http://floridathefutureishere.com/opportunities), or call 877-YES-FLORIDA.**

FLORIDA | THE FUTURE IS HERE.®



*Interstate 10, Quincy, Florida*

## Economic Development Partners

At the heart of each community, there is an Economic Development Office (EDO) that has a wealth of knowledge of the local assets including utilities, infrastructure and workforce availability. Enterprise Florida recognizes the significant impact jobs and investment has on these communities. For this reason, EFI collaborates with the local Economic Development Organizations across the state's 67 counties to carry out their shared mission to make Florida the best state in which to live and do business. These strong and productive collaborations allow Enterprise Florida to respond rapidly and resourcefully to inquiries for potential projects.

Continued interaction with the local EDOs, Utility Providers and Site Consultants proves to be the best way to stay abreast of the current trends, asset availability and issues affecting economic development across the state. Enterprise Florida was honored to welcome these partners to their Orlando Headquarters for various informative activities over the course of the fiscal year. These activities included Lunch and Learns hosted by the participating partner and Regional Trainings presented by utility providers. Representation from Enterprise Florida has also attended Community Tours, Site Consultant Events and frequently participated in teleconferences with organization leaders.

### Primary Partners

#### **Alachua**

Gainesville Council for Economic Outreach

#### **Baker**

Baker County Development Commission

#### **Bay**

Bay Economic Development Alliance

#### **Bradford**

North Florida Regional Chamber  
of Commerce

#### **Brevard**

Economic Development Commission of  
Florida's Space Coast

#### **Broward**

Greater Fort Lauderdale Alliance

#### **Calhoun**

Calhoun County Chamber of Commerce

#### **Charlotte**

Charlotte County Economic  
Development Office

#### **Citrus**

Economic Development Authority  
for Citrus County

#### **Clay**

Clay County Economic  
Development Corporation

#### **Collier**

Collier County Growth Management

#### **Columbia**

Columbia County Economic  
Development Department

#### **DeSoto**

DeSoto County Economic  
Development Corporation

#### **Dixie**

Dixie County Chamber of Commerce

#### **Duval County & Regional**

JAXUSA Partnership

#### **Escambia**

FloridaWest Economic  
Development Alliance

#### **Flagler**

Flagler County Department of  
Economic Opportunity

#### **Franklin**

Franklin County Board of County  
Commissioners

#### **Gadsden**

Gadsden County Development Council

#### **Gilchrist**

Gilchrist County

#### **Glades**

Glades County Economic  
Development Council

#### **Gulf**

Gulf County Economic  
Development Coalition

#### **Hamilton**

Hamilton County  
Development Authority

#### **Hardee**

Hardee County Economic Development  
Council/Industrial Development Authority

#### **Hendry**

Hendry County Economic  
Development Council

## Primary Partners

### **Hernando**

Hernando County Office of  
Economic Development

### **Highlands**

Highlands County Economic Development  
Commission

### **Hillsborough**

Tampa Hillsborough Economic  
Development Council

### **Holmes**

Holmes County Development Commission

### **Indian River**

Indian River Chamber of Commerce

### **Jackson**

Jackson County Economic  
Development Council

### **Jefferson**

Jefferson County Economic  
Development Council

### **Lafayette**

Lafayette County Development Authority

### **Lake**

Elevate Lake Economic Development

### **Lee**

Lee County Office of  
Economic Development

### **Leon**

Tallahassee-Leon County Office  
of Economic Vitality

### **Levy**

Levy County Nature Coast Business  
Development Council

### **Liberty**

Liberty County Chamber of Commerce

### **Madison**

Madison County Development Council

### **Manatee**

Manatee County Development Council

### **Marion**

Ocala-Marion County Chamber &  
Economic Partnership

### **Martin**

Business Development Board of  
Martin County

### **Miami-Dade**

The Beacon Council

### **Monroe**

Greater Marathon Chamber of Commerce

### **Nassau**

Nassau County Economic  
Development Board

### **Okaloosa**

Economic Development Council of  
Okaloosa County

### **Okeechobee**

Business Development Board  
of Okeechobee

### **Orange County & Regional**

Orlando Economic Partnership

### **Osceola**

Osceola County Economic  
Development Department

### **Palm Beach**

Business Development Board of  
Palm Beach County

### **Pasco**

Pasco Economic Development Council

### **Pinellas**

Pinellas County Economic Development

### **Polk**

Central Florida Development  
Council of Polk County

### **Putnam**

Putnam County Chamber of Commerce

### **Santa Rosa**

Santa Rosa Economic Development Office

### **Sarasota**

Economic Development Corporation of  
Sarasota County

### **Seminole**

Seminole County Government

### **St. Johns**

St. Johns County Board of  
County Commissioners

### **St. Lucie**

Economic Development Council of  
St. Lucie County

### **Sumter**

Sumter County Economic Development

### **Suwannee**

Suwannee County Economic  
Development Office

### **Taylor**

Taylor County Development Authority

### **Union**

Union County

### **Volusia**

Volusia County Economic Development

### **Wakulla**

Wakulla County Economic Development  
Council

### **Walton**

Walton County Economic  
Development Alliance

### **Washington**

Washington County Chamber of Commerce

## Regional Partners

### Florida's Great Northwest

100 College Boulevard, Building K  
Niceville, FL 32578  
(850) 337-3404

### Florida's Heartland Economic Region of Opportunity

304 NW 2nd Street, Room 123  
Okeechobee, FL 34972  
(863) 697-6325

### JAXUSA Partnership

3 Independent Drive  
Jacksonville, FL 32202  
(904) 349-1224

### North Florida Economic Development

3200 Commonwealth Boulevard, Suite 7  
Tallahassee, FL 32303  
(850) 487-1870

### Opportunity Florida

4636 HWY 90, Suite K  
Marianna, FL 32446  
(850) 718-0453

### Orlando Economic Partnership

301 E. Pine Street, Suite 900  
Orlando, FL 32801  
(407) 422-7159

### Southwest Florida Economic Development Alliance

4984 Royal Gulf Circle  
Fort Myers, FL 33966  
(239) 208-7627

## Utility Partners

### Duke Energy

450 East Crown Point Road, WG-13  
Winter Garden, FL 34787  
(407) 905-3443

### Florida Power & Light Co.

700 Universe Boulevard  
Juno Beach, FL 33408  
(561) 691-2365

### Gulf Power Company

One Energy Place  
Pensacola, FL 32520  
(850) 444-6057

### PowerSouth Energy Cooperative

495 Grand Boulevard, Suite 206  
Miramar Beach, FL 32550  
(850) 269-7190

### TECO Energy

702 North Franklin Street  
Tampa, FL 33602  
(813) 228-4497



## Business Development

TOTAL PROJECTS  
ESTABLISHED:  
**124**

TOTAL JOBS CREATED:  
**15,436**

CAPITAL INVESTMENT:  
**\$1.71 Billion**

Enterprise Florida's Business Development Division is responsible for assisting businesses with site location in order to facilitate job creation and retention within the State. The Division works with companies and site selection consultants as well as primary and regional partners across Florida's 67 counties to attract high quality jobs within the State's targeted industries.

Encouraging the growth of existing Florida companies also contributes to the day-by-day operations of the division. Retaining and expanding local businesses is central to the mission of economic development and creates a community where business can thrive.

During fiscal year 2017-2018, the Business Development Division established 124 business expansion and recruitment projects which will create or retain 15,436 jobs in the State. Major project announcements in FY 2017-2018 included VT Mobile Aerospace Engineering, Wyndham Destinations, Modernizing Medicine, and Pratt & Whitney.

Fostering relationships with site selectors, industry leaders and Florida's 67 local partners is a critical element of the economic development process. These relationships generate competitive project leads which in turn facilitate job creation and investment in the State. Florida's opportunity to compete for a new project is often a result of an existing relationship with a site consultant.

Specific events to generate leads and build these relationships during FY 2017-2018 included visiting consultants in their home markets, attending and sponsoring site selection conferences (CoreNet Global, IAMC), and business development missions to industry trade shows (Paris Air Show, MRO Americas, Miami Boat Show, SelectUSA, Hospitalar and MEDICA). The Division also conducted various workshops and presentations around the State educating stakeholders on issues such as incentives, the economic development process, Brownfields, and other competitive issues. As a result, the Business Development Division opened 304 new projects during fiscal year 2017-2018.

The Division continued its aggressive business recruitment efforts for International Business Development. Resources were devoted to promote Florida as a strategic and cost effective global business destination for foreign direct investment (FDI) in targeted industries. Among specific promotion efforts were business development missions at the Paris Air Show and at HOSPITALAR, the largest medical device show in Latin America. These cooperative efforts with EFI's International Trade Division and EFI's international offices across 13 countries have been extremely successful, and will continue as part of the international business recruitment strategy.

Business Development was instrumental in partnering with the Department of Economic Opportunity (DEO) in support of the Florida Job Growth Grant Fund (FJGGF) development and implementation. The Division provides analysis of all applications to assess the validity and viability of infrastructure-related or educational grant requests. These grants help to provide Florida communities with additional resources needed to facilitate organic job creation or better equip and train Florida's workforce.

The Division also participated in the development of the new Statewide Strategic Plan for Economic Development, which is completed every five years.

The Division is now taking a more proactive approach to business retention, which has historically been a function of local economic development organizations. The Business Development team is undergoing this initiative by targeting Florida-based public and private companies along with any Fortune 1,000 companies headquartered in the Sunshine State. This effort will allow the Division to understand what is motivating existing Florida companies to expand or consider a relocation out of state. Currently, Florida does not offer any tools to encourage an organization considering a relocation out of Florida without the creation of a ten percent growth in the current workforce.

This new approach will allow Enterprise Florida's project managers to uncover supply chains that affect Florida companies and work to retain or attract these businesses to the state.

Business Development is seeing a historically average level of project activity, although projects are smaller in both the number of net new jobs and capital investment. This is in line with the lack of incentive tools at the Division's disposal to attract projects to Florida (loss of Quick Action Closing Fund, Economic Development Transportation Fund and a lack of flexibility with training programs).

Foreign Direct Investment projects continue at the same pace as the Division has historically seen, especially from Western Europe, the United Kingdom and Latin America. Business Development will continue to leverage our international offices to uncover potential FDI projects that have a propensity to look to Florida for their North American operations.

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## Project Highlights



We are thankful for the tremendous support from the State of Florida and Pensacola City governments, which have enabled us to set up the new facility on schedule and commence operations quickly."

- Lim Serh Ghee, President  
of Aerospace

### VT Mobile Aerospace Engineering – Pensacola

Lim Serh Ghee, President of Aerospace: "We are thankful for the tremendous support from the State of Florida and Pensacola City governments, which have enabled us to set up the new facility on schedule and commence operations quickly. Pensacola serves as an excellent base for us to serve the MRO needs of the North America region given its rich pool of highly trained engineering and aviation talent. We are happy to have United Parcel Service as our launch customer at the new facility, and we look forward to welcoming more customers and supporting them with the same high level of quality and on-schedule redeliveries regardless of where our hangar is located, time and again."



VT MAE Grand Opening, Pensacola, Florida



**We are extremely excited to expand our presence and create more jobs across a wide range of fields in South Florida.”**

- Daniel Cane, CEO & Co-Founder,  
Modernizing Medicine

### Modernizing Medicine – Boca Raton

Daniel Cane, CEO & Co-Founder: “We are extremely excited to expand our presence and create more jobs across a wide range of fields in South Florida. As a Florida-based technology company, it’s not lost on us that we’re in the backyard of where the modern day era of technology was born. We’re proud to work with Enterprise Florida, the City of Boca Raton and the Business Development Board of Palm Beach County to continue to enhance the already stellar reputation as an area of innovation and growth. I look forward to seeing the company’s long-term impact on the community as well as the modernization of medicine.”

### Pratt & Whitney – Jupiter

David Carter, Senior Vice President of Engineering: “We are thankful for the support we receive from the State of Florida and Palm Beach County as we add 215 positions to our employee base of 1,300 and \$100 million in capital investment in addition to over \$88 million we’ve invested in manufacturing and technology improvements to this site since 2012.”



Pratt & Whitney, Jupiter, Florida

## International Trade and Business Development

During fiscal year 2017-18, the International Trade & Development (IT&D) Division continued expanding its services designed to help small and medium-sized enterprises (SMEs) enter and engage in international markets. Among the significant outcomes:

- Assisted Florida companies in generating more than \$712.5 million in actual and expected sales through our export development programs.
- Conducted 34 international business development events statewide and globally with over 500 Florida participants.
- Provided 5,579 export counseling sessions to 2,338 Florida companies in fiscal year 2017 — 18 through a network of six trade offices around the state. Of those, 3,901 counseling sessions were with 1,891 companies within Enterprise Florida's target-industry sectors.

The Division's outreach programs focus on assisting Florida manufacturers, technology firms, and value-added knowledge-based services providers to expand and diversify their exports. This was achieved through the following initiatives:

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### Trade Missions

EFI organized several trade missions in key markets last fiscal year.

**Israel** In December 2017, Governor Rick Scott led a business development and trade mission to Israel with a delegation of 67 Florida business executives, representing 60 companies and institutions. The Governor had private meetings with a total of eight Israeli companies with an interest in expanding in Florida; four memorandums-of-understanding were signed; EFI Israel organized a total of 25 meetings for four Florida universities and colleges during the mission, and the U.S. Commercial Service (USCS) in Israel facilitated one-on-one business matchmaker meetings with five Florida participants who reported approximately \$3.6 million in total sales.

**Costa Rica** IT&D conducted an Export Sales Mission to San Jose, Costa Rica from February 26 – March 1, 2018 with a total of 41 participants including Florida companies; economic development agencies and local government; representatives from two of the state's seaports, and delegates from the private sector. The mission participants met with relevant business sector leaders, government officials and Costa Rican counterparts from the private sector. Twenty-one companies participated in business-matchmaking sessions organized by the U.S. Commercial Service in San Jose and reported total export sales of \$23.3 million.

**Hong Kong and Guangzhou, China** Two separate trade missions took place in June 2018. The first was the Export Sales Mission to Hong Kong and Guangzhou, China. The mission consisted of 18 participants representing companies throughout Florida, plus two executives from a major Florida seaport. Twelve (12) companies participated in the U.S. Commercial Service (USCS) Gold Key program in Hong Kong and Guangzhou. The USCS in both locations coordinated the Gold Keys and other events. They served as our official partners and arranged nearly 200 Gold Key appointments.

**São Paulo, Brazil** EFI conducted its first-ever Service Export Mission (to São Paulo, Brazil) from June 23 – June 27, 2018. This event was exclusively focused on Florida professional service providers with eight (8) local companies representing this sector. The U.S. Commercial Service office in São Paulo was instrumental in organizing one-on-one business matchmaking appointments for the participants who reported nearly \$5 million in export sales. In addition to promoting Florida as a major international trade hub, the event offered new and important business opportunities for the participants to access the Brazilian market – Florida’s largest trading partner and the largest economy in Latin America.

**Outbound Trade Missions** IT&D also supported three outbound trade missions conducted by our trade and economic development partners to Colombia, China & Japan, and Mexico. Two inbound trade missions (from Nigeria and the Dominican Republic) were hosted by partners with assistance from EFI.

## Trade Shows

The State of Florida is represented at some of the world’s leading trade shows in our target sectors. EFI manages a “Florida Pavilion” at a number of these events and is known for having some of the largest contingents of participants compared to other U.S. states and countries. Trade shows help generate the most export sales for our clients and are an essential component of our export development program.

Eleven overseas trade shows were conducted in nine countries last year with a total of 106 companies participating and \$361.6 million in export sales reported.

## Major Overseas Trade Shows Conducted During FY 2017/2018

| Trade Show/Exhibition            | Date       | Country              | Total Export Sales Reported | Companies Participating |
|----------------------------------|------------|----------------------|-----------------------------|-------------------------|
| Medical Fair Thailand 2017       | 9/6/2017   | Thailand             | \$2,680,000                 | 4                       |
| MRO Europe 2017 – London         | 10/2/2017  | United Kingdom       | \$7,808,000                 | 6                       |
| GITEX Technology Week 2017       | 10/8/2017  | United Arab Emirates | \$21,569,000                | 6                       |
| Dubai Airshow 2017               | 11/12/2017 | United Arab Emirates | \$17,375,000                | 7                       |
| Medica 2017                      | 11/13/2017 | Germany              | \$122,000,900               | 24                      |
| Marine Equipment Trade Show 2017 | 11/14/2017 | Netherlands          | \$37,918,600                | 7                       |
| Arab Health 2018                 | 11/12/2017 | United Arab Emirates | \$69,770,000                | 21                      |
| Singapore Airshow 2018           | 11/12/2017 | Singapore            | \$51,071,000                | 10                      |
| FIDAE 2018                       | 11/12/2017 | Chile                | \$12,685,000                | 5                       |
| Hospitalar 2018                  | 11/12/2017 | Brazil               | \$17,716,000                | 9                       |
| Colombia Nautica 2018            | 11/12/2017 | Colombia             | \$982,000                   | 7                       |
| <b>TOTAL</b>                     |            |                      | <b>\$361,575,500</b>        | <b>106</b>              |



*Florida Pavilion, MEDICA Trade Show, Düsseldorf, Germany*

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## Education and Training Programs

Throughout the year, the international team conducts education and training programs around the state which are led by our regional trade managers in conjunction with our trade and economic development partners. These events help further engage companies with our trade assistance programs such as trade missions, trade shows, export counseling and trade grants.

- Last fiscal year, Enterprise Florida hosted thirteen individual events on topics such as “Go Global Like a Pro! Exporting Assistance & Trade Grants Roadshow;” “Business Opportunities in Costa Rica,” “Doing Business in South Africa,” and “Doing Business in Germany.”
- Events were held in Broward, Escambia, Hillsborough, Miami-Dade, Orange, Palm Beach, Pinellas, and St. Johns counties with over 200 participants.

## Florida Export Diversification and Expansion Program (Trade Grants)

Enterprise Florida offers an effective trade grants program to Florida small and medium-sized manufacturers and services providers through the “Florida Export Diversification and Expansion Program.” These grants are designed to help new-to- export companies begin doing business overseas as well as more experienced exporters diversify their sales into new markets. Under this program, qualified Florida companies have access to four trade grant programs that cover varying costs of the companies’ export promotion and development activities. Last fiscal year, 203 such grants were awarded.

### Florida Export Diversification and Expansion Program Trade Grants Awarded During FY2017/18

| Grant Program                           | # Awarded  |
|---|------------|
| Target Sector Trade Show Grants         | 128        |
| Reimbursable Gold Key/Matchmaker Grants | 58         |
| Export Marketing Plans                  | 15         |
| Website Localization Grants             | 2          |
| <b>TOTAL</b>                            | <b>203</b> |

## Military and Defense



*F/A-22 Raptor over Florida*

Enterprise Florida's mission to preserve and protect military installations to support the state's position in research and development related to or arising out of military missions and contracting is achieved through the initiatives of the Florida Defense Alliance and the Florida Defense Support Task Force. Both entities strive to improve the state's military-friendly environment for service members, military dependents, military retirees, and businesses that bring military and base-related jobs to the state. Florida is home to 20 major military installations with an economic impact of \$84.9 billion annually and over 800,000 jobs. Florida is also home to 1.5 million military veterans and retirees.

In 1998, the Legislature created the Florida Defense Alliance and the defense grants program under Enterprise Florida. The mission of EFI Military and Defense Programs is closely related to economic development, or, in the case of potential base closures, redevelopment.

The Florida Model for supporting military installations and missions is nationally recognized as the best in the nation. The model includes the Governor's Base Commander Meetings, in addition to both the Florida Defense Alliance and the Florida Defense Support Task Force.

The Military and Defense division serves as the state's subject matter expert on military and defense issues related to the 20 major military installations and the active duty forces and family members stationed in Florida.

The division also coordinates all military and defense issues with the Governor's Office, the Legislature, state agencies and the Florida Congressional delegation.

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## Florida Defense Support Task Force (FDSTF)

In 2011, the legislature created the Florida Defense Support Task Force (FDSTF) to protect the state's military installations against possible realignment and closure.

The FDSTF actively supports the military installations and missions with a particular emphasis on preventing encroachment. The Task Force has contracted for aggressive advocacy in Washington on behalf of Florida's military installations and missions.

The Task Force is governed by a board consisting of 13 members that are appointed by the Governor and the Legislature with four-year terms, with the exception of members of the Legislature who correspond with their terms in office.

To strengthen the state's military installations, the FDSTF created a non-statutory grant program. The funding for this program is appropriated by the Legislature and through a contractual relationship with the Florida Department of Economic Opportunity.

In fiscal year 2017-18, Legislature appropriated \$2 million to the Task Force to carry out their mission. Task Force awarded 5 grants totaling \$1.329 million to improve the military value of Florida's installations.

The Task Force conducted 10 meetings and visited military bases around the state during fiscal year ending June 2018. Additionally, it has continued implementation of its long range



strategic plan for actions to protect, preserve and enhance Florida's military installations. This plan was updated in March 2018.

### Successes

- DSTF awarded 55 grants worth over \$12.4 million since 2012 to strengthen military installations and prevent encroachment.
- Contracted with the Principi Group since 2012 to advocate on behalf of Florida's military missions and installations in Washington. This group also conducted a comprehensive reexamination of Florida's major state military installations, analyzing Strengths, Weakness, Opportunities and Threats.
- Updated the annual military and defense economic impact study showing the economic impact of military and defense in Florida to be more than \$84.9 billion and accounting for more than 801,747 direct and indirect jobs.
- Published an updated 2018 Florida Military Friendly Guide providing a summary of the laws and programs that benefit service members and families stationed in Florida.
- Florida has added significant missions and resources including:
  - A 3-ship Amphibious Ready Group at NS Mayport
  - Littoral Combat Ship (LCS) squadron at NS Mayport
  - Additional F-22 squadron at Tyndall AFB
  - Navy MQ4C Triton drones at NAS Jacksonville
  - Air Force MQ9 drones at Tyndall AFB
  - Special Ops MQ9 drones at Hurlburt Field

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## Florida Defense Alliance (FDA)

The Florida Defense Alliance, an organization within Enterprise Florida, is a volunteer grassroots alliance that represents local defense communities around the state and ensures that Florida, its resident military bases and missions, and its military host communities are in competitive positions as the United States continues its defense realignment. The FDA works to maintain and enhance the position and reputation of Florida as the most military-friendly state in the nation.

The defense alliance is made up of representatives of defense-related organizations including federal, state, and local government organizations as well as the defense industry, economic development organization, and other interested parties.

Currently, there is no direct funding for the Florida Defense Alliance. Administrative costs for this entity are underwritten by Enterprise Florida.

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## Minority and Small Business, Entrepreneurship and Capital Support

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### Capital Programs

Enterprise Florida partners with the Department of Economic Opportunity, the Small Business Administration (SBA) and other outside organizations to provide small, minority and entrepreneurial companies with training, development and financing options. EFI has an extensive network of state, federal and non-profit resources ready to assist small businesses in accessing capital, entering new markets, and creating revenue growth and job creation.

EFI facilitates the following capital programs that match qualifying small businesses with lenders that can provide financial assistance and lines of credit:

- **State Small Business Credit Initiative (SSBCI)** and Microfinance Guarantee programs are designed to assist small businesses in obtaining loan approvals and leverage private capital for use in startup costs, working capital, business procurement, franchise fees, equipment, inventory, or the purchase of owner-occupied commercial real estate. The program provides a lender with the necessary security, in the form of a partial guarantee, for the lender to approve a loan or line-of-credit.
- **Florida Opportunity Fund** provides venture capital for start-up and early-stage businesses. State Venture Capital Programs often take one of two forms: a state-run venture capital fund (which may include other private investors) that invests directly in businesses; or a fund of funds, which is a fund that invests in other venture capital funds that in turn invest in individual businesses. Many factors, particularly resources and available talent, inform a state's decision on which form to choose.

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### Minority Business Development

Enterprise Florida has endeavored to support existing minority development efforts by providing referral services to EFI's network of resources. The following organizations are a part of this undertaking:

- The Florida Advisory Council on Small and Minority Business Development
  - The Florida Association of Minority Business Enterprise Officials
  - The Hispanic Business Initiative Fund
  - Florida State Minority Supplier Development Council
-

# Florida Sports Foundation, Incorporated

FY2017-2018 Annual Report

## Mission

The **Florida Sports Foundation, (FSF)**, is a 501(c)(3) non-profit corporation, serving as the Sports Industry Development Division of Enterprise Florida, Inc., (EFI). The mission of FSF is to:

1. Assist Florida's communities with securing, hosting and retaining Sporting events and sports related business that generate significant economic impact and Sports Tourism for the state of Florida through the Foundation's grant programs\*, legislative initiatives and Industry Partner service, recognition and development.
2. Provide the citizens of Florida with participation opportunities in Florida's Sunshine State Games and Florida Senior Games events.
3. Serve as Florida's leading resource for Sport Tourism research and facts.
4. Assist in the promotion of targeted leisure sports industries in Florida.
5. Assist National and Florida State Governing Bodies to promote amateur sport development through Florida's Sunshine State Games and hosting events in Florida.

*\* The FSF grant programs work to assist communities and organizations in attracting major sporting events. These events are designed to attract out-of-state visitors and generate a significant economic impact. Grants are awarded for events that are projected to have strong economic impacts, a positive return on investment, garner community support and add value to the state of Florida.*



South Florida Water Polo 16U Teams: Coral Springs & Pompano Beach, June 2018

## Operations

Fiscal Year 2017/18 was a year of change at FSF. FSF added a new president, staff members and Board Chair to name a few. Angela Suggs became President and CEO of FSF on August 7, 2017, and began her tenure by touring the state and meeting with every partner. Her travel included attending her first Board of Directors' meeting just 4 days into her new position on August 11, 2017, where Board Chair Jesse Biter began his term on the Board. Besides the President, FSF currently has 10 full-time employee positions:

1. Vice President of Amateur Sports & Events
2. Director of Administrative Affairs
3. Director of Communications
4. Director of External Affairs
5. Director of Sports Development
6. Event Manager
7. Event Coordinator (two positions)
8. Executive Assistant to the President
9. Finance & Grant Coordinator

The offices of FSF were located in Tallahassee and Clearwater at the beginning of the year, and by mid-year, the Clearwater office was closed and the Amateur Sports Programs moved back to Tallahassee.

## Budget

The majority of the budget of FSF is based on State revenue from legislative appropriations, which is appropriated through a contract with the Department of Economic Opportunity, (DEO).

### **Grants, Economic Development & Related Programs**

- FSF's oldest appropriation, from 1995, comes from the Professional Sports Development (PSD) Trust Fund, where the sale of Professional Sports Teams License Plates from 9 pro teams are deposited, (up to \$3 million);
- Grant Program appropriation, \$1,000,000;
- Other specialty tag revenue from the USOC, NASCAR and USTA license plate sales, amounts which vary, based on percentages of sales.

### **Amateur Sports Programs**

- Sunshine State Games, \$200,000;
- Florida Senior Games, \$500,000

The PSD trust fund dollars for this year ended at \$2,874,910, an increase over the previous year of 3%, (see Attachment Annual Reports A. 1-3 for the updates on the Budget).

## Grant Programs

The FSF's Major Grant Program, is designed to assist communities and host organizations in attracting sports events, which will generate significant out-of-state economic impact for the state of Florida. The Foundation's Board of Directors awards grants on a quarterly basis, and places emphasis on economic impact, return on investment, community support and image value to the state.

The FSF's Small Market Grant Program (SMG) is designed to reach Florida's rural and small market communities, as well as those communities new to the sports industry. It is the intention of the Foundation to assist the small market areas and grow them out of the program in future years.

The FSF's Sport Industry Conference Assistance (SICA) Program is designed to assist communities in attracting legitimate event rights holders to market the state of Florida and generate viable event leads.

## Grant Awards

In FY 2017-2018, the Florida Sports Foundation partnered with Florida communities to award 127 sporting event grants a total of \$2,435,095, which were projected to attract more than 648,697 new visitors to the state and generate an economic impact worth \$588,670,942. Understanding the importance of sports tourism at the local level, the FSF awarded these grants to 23 industry partners in 8 of 8 regions. 97 of these were scheduled to take place during the FY, and 31 were scheduled to take place beyond the FY. Please see Attachment B.1 & 2 for detailed information on the awarded grants during the year.

### FY 17/18 Awards

|                        | Applications Received | # Approved | # Awarded  | Total Amount Awarded | Total Economic Impact - Projected | Total Out-of-State Visitors - Projected | Estimated Return on Investment |
|------------------------|-----------------------|------------|------------|----------------------|-----------------------------------|---|--------------------------------|
| 1st Qtr-Major          | 32                    | 32         | 30         | \$ 413,250           | \$ 162,293,864                    | 152,890                                 | \$ 400                         |
| 1st Qtr-SMG (Minor)    | 4                     | 4          | 4          | \$ 10,525            | \$ 1,141,963                      | 2,281                                   | \$ 109                         |
| 1st Qtr-SICA (Minor)   | 1                     | 1          | 1          | \$ 5,000             | \$ 448,236                        | 425                                     | \$ 90                          |
| 2nd Qtr-Major          | 35                    | 32         | 32         | \$1,066,350          | \$188,328,968                     | 234,604                                 | \$ 177                         |
| 2nd Qtr-SMG (Minor)    | 12                    | 12         | 12         | \$ 36,800            | \$ 5,461,570                      | 8,189                                   | \$ 148                         |
| 2nd Qtr-SICA (Minor)   | 0                     | 0          | 0          | –                    | –                                 | 0                                       | –                              |
| 3rd Qtr-Major          | 26                    | 26         | 26         | \$ 332,810           | \$ 68,030,456                     | 88,308                                  | \$ 204                         |
| 3rd Qtr-SMG (Minor)    | 4                     | 4          | 4          | \$ 19,500            | \$ 2,320,633                      | 4,953                                   | \$ 119                         |
| 3rd Qtr-SICA (Minor)   | 2                     | 2          | 2          | \$ 7,000             | \$ 437,584                        | 562                                     | –                              |
| 4th Qtr-Major          | 15                    | 15         | 15         | \$ 538,860           | \$ 159,812,143                    | 155,655                                 | \$ 297                         |
| 4th Qtr-SMG (Minor)    | 1                     | 1          | 1          | \$ 5,000             | \$ 395,525                        | 830                                     | \$ 79                          |
| 4th Qtr-SICA (Minor)   | 0                     | 0          | 0          | –                    | –                                 | 0                                       | –                              |
| <b>TOTALS FOR YEAR</b> | <b>132</b>            | <b>129</b> | <b>127</b> | <b>\$ 2,435,095</b>  | <b>\$ 588,670,942</b>             | <b>648,697</b>                          | <b>\$ 242</b>                  |

## Awards by Region

| Region                                 | # Awarded  | Amount Awarded      | Projected Out-of-State Impact | # Projected Out-of-State Visitors |
|--|------------|---------------------|-------------------------------|-----------------------------------|
| Central                                | 29         | \$ 896,910          | \$ 219,581,977                | 237,834                           |
| Central Eastern                        | 12         | \$ 80,625           | \$ 45,527,333                 | 76,413                            |
| Central Western                        | 10         | \$ 496,000          | \$ 48,798,937                 | 60,916                            |
| North Central                          | 3          | \$12,400            | \$ 1,448,839                  | 3,480                             |
| North Eastern                          | 1          | \$ 6,550            | \$ 1,154,933                  | 2,105                             |
| North Western                          | 8          | \$ 74,200           | \$ 15,033,133                 | 19,277                            |
| South Eastern                          | 40         | \$ 604,900          | \$ 202,794,834                | 164,264                           |
| South Western                          | 24         | \$ 263,510          | \$ 54,330,956                 | 84,408                            |
| <b>Totals by Region for FY 2017/18</b> | <b>127</b> | <b>\$ 2,435,095</b> | <b>\$ 588,670,942</b>         | <b>648,697</b>                    |

## Completed Granted Events

**Actual Impact** In FY 2017-2018, FSF invested \$2.4 million in a total of 125 sporting event grants from multiple award years, which took place and were completed during the year. The amount paid out to these grants totaled \$2,498,317, which attracted more than 649,189 new visitors to the state and generated an economic impact worth \$627,168,530. These grants ended with an average ROI of \$251:1, creating 7,638 jobs. Please see Attachment D.2 for detailed information regarding the grants taking place.

## FY 17/18 Taking Place

|                        | # Paid     | Total Amount Paid   | Total Economic Impact - Actual | Total Out-of-State Visitors- Actual | Estimated Return on Investment |
|------------------------|------------|---------------------|--------------------------------|-------------------------------------|--------------------------------|
| 1st Qtr-Major          | 22         | \$ 673,050          | \$ 100,875,293                 | 103,043                             | \$ 150                         |
| 1st Qtr-SMG (Minor)    | 1          | \$ 5,000            | \$ 865,6723                    | 1,684                               | \$ 173                         |
| 1st Qtr-SICA (Minor)   | 1          | \$ 5,000            | \$ 432,286                     | 350                                 | \$ 86                          |
| 2nd Qtr-Major          | 34         | \$ 459,459          | \$ 117,128,342                 | 186,924                             | \$ 255                         |
| 2nd Qtr-SMG (Minor)    | 5          | \$ 13,925           | \$ 1,470,609                   | 2,828                               | \$ 106                         |
| 2nd Qtr-SICA (Minor)   | 1          | \$ 5,000            | \$ 177,942                     | 350                                 | \$ 36                          |
| 3rd Qtr-Major          | 23         | \$ 991,523          | \$ 152,747,100                 | 179,654                             | \$ 154                         |
| 3rd Qtr-SMG (Minor)    | 7          | \$ 29,500           | \$ 5,213,512                   | 6,733                               | \$ 177                         |
| 3rd Qtr-SICA (Minor)   | 0          | –                   | –                              | 0                                   | –                              |
| 4th Qtr-Major          | 22         | \$ 287,960          | \$ 245,865,379                 | 163,352                             | \$ 854                         |
| 4th Qtr-SMG (Minor)    | 7          | \$ 20,900           | \$ 2,008,778                   | 3,775                               | \$ 96                          |
| 4th Qtr-SICA (Minor)   | 2          | \$ 7,000            | \$ 383,617                     | 496                                 | \$ 55                          |
| <b>TOTALS FOR YEAR</b> | <b>125</b> | <b>\$ 2,498,317</b> | <b>\$ 627,168,530</b>          | <b>649,189</b>                      | <b>\$ 251</b>                  |

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## Completed Granted Events Highlights

### Palm Beach County Sports Commission

The Winter Equestrian Festival was held January 10–April 1, 2018, brought over 20,000 out-of-state visitors, which resulted in an out-of-state economic impact of over \$99 million.

### Visit Orlando Sports

The 45th AAU Girls Jr. National Volleyball Championships were held June 16–28, 2018, and brought over 76,000 out-of-state visitors, which resulted in an out-of-state economic impact of over \$97 million.

### Pasco County Sports Commission

The 2017 TORHS 2Hot4Ice National Championships were held July 5–12, 2017 and brought over 3,500 out-of-state visitors, which resulted in an out-of-state economic impact of over \$2.7 million.

### Broward County Sports Commission

The FIVB Swatch International Volleyball Major Kickoff was held February 27– March 4, 2018, and brought over 22,000 out-of-state visitors, which resulted in an out-of-state economic impact of over \$19 million.

### Major Events

Pro Sports shined on Florida when the granted major events of two All-Star Games and the NFL Pro Bowl took place during the year bringing a combined economic impact of over \$76 million and 70,000 out-of-state visitors.

- Major League Baseball All-Star Game, July 7–11, 2017 in Miami
- NFL Pro Bowl 2018, January 28, 2018 in Orlando
- National Hockey League All-Star Weekend, January 26–28, 2018 in Tampa

## Amateur Sports Programs

### Florida Senior Games (FSG)

In 1992, the first Florida Senior Games State Championships were held in Bradenton. Over the years, the Florida Senior Games continues to grow, and together with the local games, provides fun, fellowship, fitness and competition for Florida's fastest growing age group. The focus of the Senior Games is not winning, but participating. The Florida Senior Games is dedicated to:

- Encouraging and promoting healthy lifestyles for Florida's Seniors
- Providing Florida's Seniors with the opportunity to compete at the local, state and national level
- Providing all senior citizens of Florida with an affordable and quality multi-sport festival they can call their own

Every year, the FSF sanctions the FSG Series Qualifiers in Florida, which lead up to the Florida Senior Games in December. In FY2017/18, 23 Series Qualifiers were held with over 18,000 attendees representing over \$1.4 million in local community impact. The 2017 FSG, held in Pinellas County, saw over 4,000 attendees, with athletes participating in 23 sports, and brought almost \$1 million in local community impact. Athletes came from over 200 Florida cities, 38 states, Puerto Rico, the Bahamas and Canada. The Florida Senior Games also serve as a qualifier for the bi-annual National Senior Games, run by the National Senior Games Association, (2017 was not a qualifying year).

#### Florida Senior Games Sports - 2017

- Archery
- Bag Toss
- Basketball 3 on 3
- Basketball Shooting
- Billiards
- Bowling
- Bowling-Team
- Cycling
- Golf
- Horseshoes
- Lawn Bowling
- Pickleball
- Powerlifting
- Race/Power Walks
- Racquetball
- Road Race-5K
- Shuffleboard
- Swimming
- Table Tennis
- Tai Chi
- Tennis
- Track &Field
- Volleyball-Indoor

### FSG Highlights

While nearly 70 percent of the athletes competing were in the 60-70 age groups, 17 athletes age 90 and over were also registered. The most experienced athletes were Paul Allair, a 96-year-old Shuffleboard player from Clearwater, and 95-year-old Mary Kemp, of Boca Raton, running the 50 and 100 meter dashes of the Track and Field competition.

Humana began their partnership with FSF during the year to be the presenting sponsor of the Florida Senior Games through 2020. Humana's commitment to the Florida Senior Games represents a natural progression as Humana has been the presenting sponsor of the National Senior Games since 2007 and partners with various state games nationwide. In 2017, Humana honored four Florida Senior Games athletes as Humana Game Changers for exemplifying healthy aging and providing encouragement, motivation and inspiration for all seniors to start with being healthy. Since launching the program in 2013, Humana has recognized 52 athletes ages 50 to 94 nationwide. The four honorees are: Shirley Chase, 92, Swimming; Brian Hankerson, 58, Track & Field; Leurene Hildebrand, 85, Track & Field; and Charles Madge, 90, Golf.



## Sunshine State Games (SSG)

The State of Florida created the Sunshine State Games to provide Florida's citizens an Olympic-style sports festival they can call their own. The Sunshine State Games, now in its fourth decade of competition, is the nation's oldest State Games and is Florida's largest and longest standing multi-sport festival. The mission of the Games is to provide quality competition for Florida's amateur athletes of all ages and skill levels. In FY2017/18, over 26,000 attendees took part in 37 sporting events in over 20 different communities, bringing over \$6.6 million in local community impact.

### Sunshine State Games Sports - 2017/2018



*Sunshine State Games Basketball Tournament in Gainesville, May 2018*

- Badminton (July)
- Sport Shooting-USPSA (Fall)
- Sport Shooting-Intl Pistol (Fall)
- Sport Shooting-Bullseye Pistol (Fall)
- Scottish Heavy Athletics (Fall)
- Beach Powerlifting (Fall)
- Beach Tennis (Fall)
- Beach Ultimate (Fall)
- Beach Super Weight Throw
- Sport Shooting-Int'l Air Rifle
- Sport Shooting-Int'l Double Trap
- Sport Shooting-Rimfire
- Sport Shooting-Int'l Wobble Trap
- Sport Shooting-Metallic
- Sport Shooting-Smallbore 3P
- Sport Shooting-Smallbore Prone
- Sport Shooting-Fun Pistol
- Lacrosse Fall Classic (Fall)
- Dominoes (Feb)
- Volleyball (April)
- Figure Skating (May)
- Lacrosse-Broward (May)
- Basketball (May)
- Archery (June)
- Fencing (June)
- Judo (June)
- Powerlifting (June)
- Paddling Marathon & Sprint (June)
- Rowing
- Swimming (June)
- Synchro Swim (June)
- Table Tennis (June)
- TaeKwonDo (June)
- Track & Field (June)
- Water Polo (June)
- Weightlifting (June)

## SSG Highlights

At the 2018 SSG Track and Field Championships, in Port Charlotte, Dr. Brian Hickey, a professor in the Florida A&M Department of Health and Physical Education joined an elite group of amateur athletes when he received his 2017 Sunshine State Games Male Athlete of the Year Award.

The 2017 Female Athlete of the Year, Angelica Ramirez, from Melbourne was honored at SSG's 2018 archery competition, held at the Easton Newberry Complex, in Alachua County in June.

Please see Attachment D.1 & 3 for detailed information on the FSG & SSG outcomes.

## Sports Development

The FSF promotes Florida as a sports tourism destination through a coordinated effort with Florida's network of Sports Commissions and Industry Partners; Florida hosts hundreds of thousands of visitors in thousands of events, in hundreds of sports each year. The FSF promotes the State of Florida and our sports commissions and partners nationally through industry trade shows, industry publications, and directly to event owners.

### Florida Sports Commissions & Industry Partners

1. **Bradenton Area Sports Commission**
2. **Broward County Sports Development**
3. **Central Florida Sports Commission**
4. **Citrus County Sports Development**
5. **Columbia County Sports Commission**
6. **Daytona Beach Area CVB – Halifax**
7. **Emerald Coast CVB, (Okaloosa County)**
8. **Experience Kissimmee (Osceola County)**
9. **Florida Citrus Sports & Events**
10. **Florida's Space Coast Office of Tourism**
11. **Gainesville Sports Commission**
12. **Greater Miami-Dade CVB**
13. **Jacksonville Sports**
14. **Lee County Sports Development**
15. **Naples, Marco Island & Everglades CVB, (Collier County)**
16. **Ocala/Marion County Sports Commission**
17. **Palm Beach County Sports Commission**
18. **Palm Coast and the Flagler Beaches**
19. **Panama City Beach CVB – Sports Development**
20. **Pasco County Sports Commission**
21. **Pensacola Sports**
22. **Polk County Sports Marketing**
23. **Punta Gorda/Englewood Beach VCB, (Charlotte County)**
24. **Santa Rosa County BOCC – Sports Development**
25. **Sarasota County Sports Commission**
26. **St. Petersburg/Clearwater Sports Commission**
27. **Tallahassee Sports Council**
28. **Tampa Bay Sports Commission**
29. **Treasure Coast Sports Commission**
30. **Visit Orlando Sports**

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## Sports Development Highlights

### Florida Sports Annual Summit

The FSF invites our partners to attend the Florida Sports Foundation's annual Summit, where representatives of the nation's top sports event rights holders present their events. This year's Summit was held in Jacksonville May 21st –May 23rd. FSF presented awards to partners and held workshops with over 20 event rights holders.

### Legislative Days

The FSF participates in and invites our partners to join and support the annual Legislative Days held during the Legislative Session every year:

- Golf Day at the Capitol
- Tourism Day at the Capitol
- Florida Senior Day at the Capitol

### Governor's Baseball Dinner

FSF hosts a dinner prior to the beginning of the Florida Spring Training season. The event is supported by Major League Baseball and is a celebration of Major League and Minor League Baseball in the state of Florida featuring guest speakers, including the Governor. The 2018 Governor's Baseball Dinner was held February 15, 2018 at Tropicana Field to celebrate another season of Major League Baseball Florida Spring Training. The dinner was attended by more than 250 guests held on the outfield turf of Tropicana Field.

### Leading Resource for Sports Tourism Research and Facts

Over the years, FSF has contracted with various well-known and prominent research firms to provide professional and advanced statistical analysis of the Sports Industry's value to the state of Florida. The most recent overall sports industry study, (done every 3 years), was completed by the Hexad Analytics in January 2017, and revealed a total economic impact of \$57.4 billion for the state.

In FY2017/18, FSF contracted with Downs and St. Germain Research to complete an impact study of Florida's Spring Training. The Florida Grapefruit League takes place annually during the Major League Baseball Spring Training season and features 15 MLB teams in 12 cities. The 2018 Florida Grapefruit League study showed an economic impact of \$687.1 million for the State of Florida.

### 2018 Key Findings

- Fans attending: 6,318 average fans per game, totaling 1,497,306 fans
- Jobs created: 7,152 accounting for \$253.5 million in wages
- Paid accommodations: 355,590 room nights
- Total economic impact: \$687.1 million

## Measures and Outcomes

### Annual Measures Update

The chart below summarizes the outcomes of the Fiscal Year 2017/18, showing an increase over the standards. Please see Annual Report Attachment D for the full report.

The Amateur Sports events of the Sunshine State Games and the Florida Senior Games are holding steady year after year, and we were able to exceed the standards by 159% and 123%.

The granted events held during the year again exceeded the standards as set by 314% and 216%.

## FY 2017/2018 Summary: Final Performance Measures

|   | Standards      | Total Outcome  |
|---|----------------|----------------|
| <b>1. Florida Sunshine State Games and Florida Senior Games State Championships (In-State)</b>  |                |                |
| Economic contributions to communities as a result of hosting Florida's Senior State Games and Sunshine State Games Championships            | \$ 7,000,000   | \$ 11,146,513  |
| Number of participants, (athletes & families), competing in & attending Florida's Senior State Games and Sunshine State Games Championships | 40,000         | 49,276         |
| <b>2. Regional and Major Sporting Event Grants (Out-of-State)</b>   |                |                |
| Economic contributions from Florida Sports Foundation sponsored sporting event grants   | \$ 200,000,000 | \$ 627,168,530 |
| Number of attendees at the sponsored grant events   | 300,000        | 649,189        |

## Attachments

The following **Florida Sports Foundation** reports can be located at <https://www.flasports.com/2017-2018-final-report/>

### A. Annual Report on the Budget

1. Professional Sports Development Trust Fund as compared to the Budget
2. Fiscal report comparison of the original budget by quarter and year
3. Report comparison of the original budget of State funds by quarter and year
4. Unbudgeted Income and Expense

### B. Annual Report on the Grant and Charity Programs

1. Status Report on the Grant & Charity Programs
2. All Grants awarded for the Fiscal Year
3. Distribution of funds to Florida Based Charities during Fiscal Year

### C. Annual Report on the Trust Fund

### D. Annual Report on the Measures

1. Final Report on the Annual Measures
2. Detailed information regarding the economic impact of granted events
3. Detailed information regarding Sports Activities

The following **Enterprise Florida** divisional reports can be located at:

### A. International Offices Annual Report Fiscal Year 2017/18

<https://www.enterpriseflorida.com/wp-content/uploads/A.-Final-FY-2017-18-International-Offices.pdf>

### B. Marketing & Communications Annual Report Fiscal Year 2017/18

<https://www.enterpriseflorida.com/wp-content/uploads/B.-Marketing-Annual-Report.pdf>

### C. Fiscal Year 2017/18 Customer Satisfaction Survey

<https://www.enterpriseflorida.com/wp-content/uploads/C.-Customer-Satisfaction-Survey.pdf>

### D. Fiscal Year 2017/18 Audit Report

<https://www.enterpriseflorida.com/wp-content/uploads/EFI-Audited-Financial-Statements-2018.pdf>

### E. Florida Export Finance Corporation Annual Report Fiscal Year 2017

<https://www.enterpriseflorida.com/wp-content/uploads/E.-FEFC-Annual-Report-2017.pdf>

### F. Visit Florida Annual Report Fiscal Year 2017/18

<https://www.visitflorida.org/about-us/what-we-do/annual-reports/>

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