

Enterprise Florida, Inc.

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# ANNUAL REPORT

2018-19



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# RON DESANTIS

*Governor of Florida  
Chairman, Enterprise Florida, Inc.*



Dear Floridians,

As you receive this annual report, I would like to highlight some of my work with Enterprise Florida since taking office. Florida remains the best state in the country to pursue a career and start or grow a business, and I am grateful to Enterprise Florida for their efforts to make sure it stays that way.

I have taken three trips with EFI to two high-tax states, New York and Illinois, for the purpose of spreading Florida's pro-business message, and I look forward to more of these trips in the future. Executives across the country are generally familiar with Florida's low taxes and favorable regulatory environment. They are also familiar with our great weather and quality of life. They may not know, however, that Florida has the top ranked university system for three years in a row, or about my administration's initiatives—from education to the environment—that will enhance our favorable tax and regulatory environment. They also may not know that since taking office, I have had the privilege of appointing over 35 judges across the state and three Supreme Court Justices, who will all help end judicial activism in Florida and help ensure our legal system is predictable and fair. Florida's story is a good one and it is essential we tell it.

With EFI's assistance, I also had the distinct honor to host my first international business development mission in Israel. The trip involved a bipartisan delegation of more than 100 Floridians and resulted in more than 20 strategic partnerships between Israeli and Florida businesses and institutions—the most in Florida's history. While this was my only international trip this year, EFI hosted nine overseas trade missions for Florida-based businesses, including a recent trip lead by Lieutenant Governor Nunez to Colombia.

Finally, EFI continues to accept Job Growth Grant Fund applications for infrastructure and workforce development. My first two investments—one in Panama City that will help with affordable housing, and one at the Orlando Melbourne International Airport to generate increased investment from the aerospace industry—will each have a meaningful impact. As I decide on additional investments, I am particularly excited to get Florida's first FinTech academy off the ground. Financial technology, or FinTech, is the future of the financial industry, and specialized FinTech academies will help Florida's workforce fill that growing demand.

I look forward to continuing my work with the Enterprise Florida board and staff and the Florida Legislature to make sure Florida remains a state where opportunity thrives.

Sincerely,

A handwritten signature in black ink, appearing to read 'R DeSantis'. The signature is fluid and stylized, with a long horizontal line extending from the end.

Ron DeSantis  
Governor of Florida  
Chairman, Enterprise Florida, Inc.

# JOE YORK

*Vice-Chairman, Enterprise Florida, Inc.*



Florida continues to experience momentum in job creation and economic diversification. As vice-chairman of the Enterprise Florida Board, I am pleased to report that our progress is being guided by growth in advanced manufacturing, financial services and an array of other targeted industries that deliver high wages, strong capital investment and long-range stability. In fact, Florida has added nearly 30,000 manufacturing jobs over the past three years - three times the national rate of growth in manufacturing.

Last year, goods valued at \$153.5 billion dollars flowed through Florida's airports and seaports, with Florida-origin exports reaching \$73.5 billion across the globe. To further magnify what this looks like in real terms: roughly 58,000 Florida companies export internationally. That translates into more markets for our goods and steady opportunities for job growth here at home.

Thanks to the bold vision of Enterprise Florida's chairman, Governor Ron DeSantis, we are pleased to be part of a team working to make Florida the nation's leader in workforce development by 2030. The key to Florida's economic expansion will be, in part, our ability to deliver world-class instruction in the skills and knowledge that Floridians will need to fill jobs of the 21st century economy.

Sincerely,

A handwritten signature in black ink, appearing to read "J. York". The signature is stylized and fluid.

Joe York  
Vice Chairman, Enterprise Florida, Inc.

## OPERATIONS

To advance Florida's economic welfare and business opportunities, Enterprise Florida, Inc. (EFI) offers a wide range of services and information to assist new and relocating domestic and international businesses. Additionally, the organization provides the tools, resources and support needed to ensure existing companies are growing and thriving.

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:

- International Trade & Development
- Marketing and Communications
- Business Development
- Florida Sports Foundation (Sports Development)
- 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.

EFI has three offices statewide. The International Trade & Development team is led from the Miami Office with Trade Managers co-located within partner organizations across the state. The Chief Executive Officer, Legislative Affairs, Florida Sports Foundation, Military and Defense, and EFI Communications personnel are based in the Tallahassee office. The Orlando Headquarters serves as the home base for EFI's leaders in Marketing, Business Development and Administration.

To achieve global recognition and strengthen Florida's competitiveness internationally, EFI collaborates contractually with 12 foreign offices. These offices are strategically located for trade development and/or the attraction of inward foreign direct investment.

By way of this report, EFI proudly presents an overview of the activities and operations of each division for fiscal year ending June 30, 2019.

### FY 2018-19 Performance Measures

General	Results	Standard
Satisfaction of businesses served with investment or trade assistance provided by Enterprise Florida	97%	95%
Number of strategies in the Florida Strategic Plan for Economic Development being implemented by Enterprise Florida	11	11
Response rate for Business Development/International Trade Development customer satisfaction survey	32%	25%

## FUNDING

As a public-private partnership, EFI receives funding from private corporations as well as the State of Florida. Through a contractual relationship with the Florida Department of Economic Opportunity (DEO), EFI 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. EFI's investors contribute to the match requirement identified in Florida Statute section 288.904(2)(a). EFI is required to raise no less than 100 percent of the state's operating investment. For fiscal year 2018/19 that requirement was \$16,000,000.

Private sector support in operating EFI 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.

## Enterprise Florida, Inc.

### Matching Funds for FY 2018-19

Through June 30, 2019

1. Corporate Contributions	
a) EFI Corporate Contributions	\$1,599,029
b) TMFL Corporate Contributions	\$150,000
c) FSF Corporate Contributions	\$119,000
2. Sponsorships & Event Revenue	
a) EFI Sponsorships & Event Revenue	\$1,132,944
b) FSF Event Revenue/Entry Fees	\$297,225
3. Programs, Publications, Misc.	
a) State Small Business Credit Initiative Program Fees & Interest	\$657,009
b) Microfinance Program Fees & Interest	\$22,595
c) Florida Sports Foundation Miscellaneous Revenue	\$74,545
d) EFI Administrative Services & Miscellaneous Revenue	\$295,134
e) Florida Opportunity Fund Interest	\$314,694
f) Florida Opportunity Fund Realized Returns	\$4,701,517
4. Advertising – Raised Private/Corporate – VISIT FLORIDA	
	\$14,947,671
Total Match	
	<b>\$24,311,364</b>

## 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. EFI 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 EFI 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. EFI 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 EFI 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

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Tallahassee, FL 32303  
(850) 487-1870

### Opportunity Florida

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

### Orlando Economic Partnership

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Orlando, FL 32801  
(407) 422-7159

### Southwest Florida Economic Development Alliance

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Fort Myers, FL 33966  
(239) 208-7627

## Utility Partners

### Duke Energy

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Winter Garden, FL 34787  
(407) 905-3443

### Florida Power & Light Co.

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Juno Beach, FL 33408  
(561) 691-2365

### Gulf Power Company

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Pensacola, FL 32520  
(850) 444-6057

### PowerSouth Energy Cooperative

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

### TECO Energy

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(813) 228-4497

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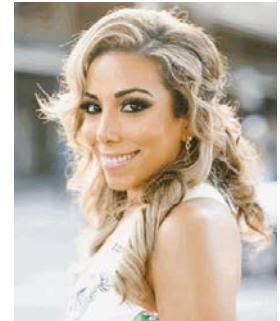
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\*\*\*Appointed/Statute

## 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

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## Operations & Accomplishments

Rural Florida's regions consist of 32 counties that possess an array of untapped resources that are crucial to business relocation and expansion. These communities are primed for development with affordable land, infrastructure availability, central location and a high 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.

EFI developed a dedicated position for a rural specialist who works directly with these communities. The Director of Rural and Agriculture Development is tasked with consistently communicating and visiting with communities to gain confidence of leaders, problem solve, recruit industries and engage to help build a strong and resilient economy. EFI also secured membership with the National Rural Economic Development Association (NREDA) which is a professional organization dedicated exclusively to the advancement of rural development.

Representation from EFI has been present at several round table discussions and Board of Directors Meetings. EFI attended and sponsored the Rural Economic Development Summit held in Kissimmee in February 2019.





## Marketing Rural Florida

Two rounds of grants were awarded in Fiscal Year 2018/2019. Starting in December 2018, \$112,290 was evenly distributed to each of the three regional organizations to continue the development and implementation of marketing plans, training courses and website enhancements.

In April 2019, EFI launched the Rural Florida Marketing and Education Grant Program. The program was established to support rural communities, efforts to market their counties and provide additional educational, technical, marketing and lead generation opportunities to their employees, elected officials or board members.

More than \$205,000 in grant funds were awarded to 19 of the 32 rural communities for marketing efforts including print, broadcast, digital, social media, out of home, direct mail, brochure production, website development, as well as other related projects.

The grant program also provided the opportunity for these organizations to obtain or renew membership with the International Economic Development Council (IEDC), Florida Economic Development Council (FEDC) and the National Rural Economic Development Association (NREDA).

Additionally, grant funds were used for attendance at any approved economic development-related conference or forum and participation in any training course offered by the International Economic Development Council (IEDC). EFI will continue to aggressively market the program in an effort to increase the awareness and usage of the program.



**IN THE CENTER OF EVERYTHING  
TO LAND YOUR BUSINESS  
FOR SUCCESS.**



- Centrally Located
- Rail Services
- Local Regional Airport
- Less Than Two Hours to Four International Airports
- Less than an hour to I-95
- 2019 Aspen Award Winning State College
- Two Opportunity Zones
- Competitive Labor Rates






**LAND FOR BUSINESS SUCCESS**  
863.357.2334 • [OCEDCORP.COM](http://OCEDCORP.COM)



**GADSDEN COUNTY  
Florida  
DEVELOPMENT COUNCIL**

**Gulf to Gadsden FLZ**

- Spans from Gadsden County to Gulf of Mexico
- Utility served ILC located in Gadsden County at I-10
- Priority public funding for project within the FLZ



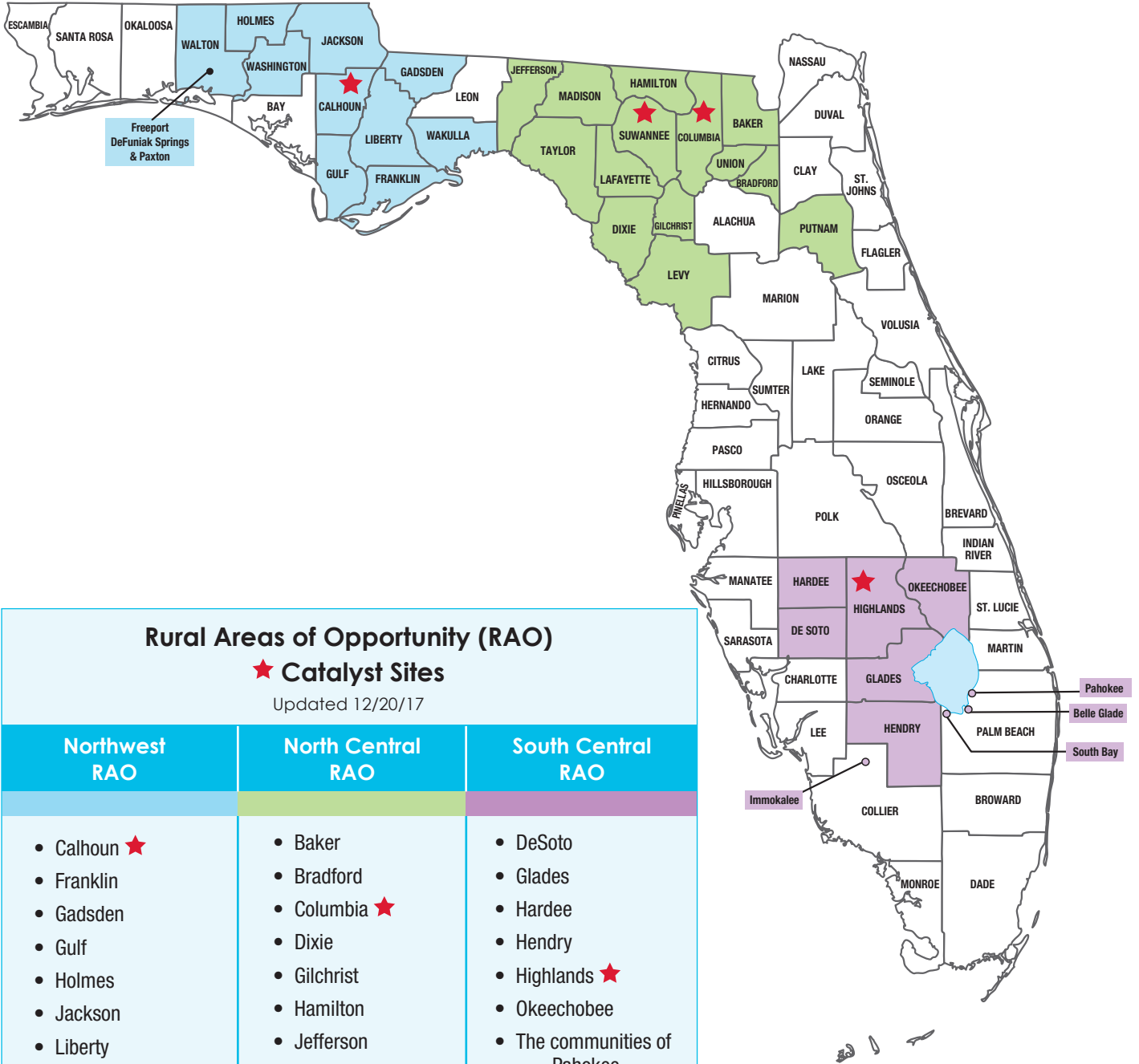
**Give Your Business Quick Access to the Gulf and Latin America**

The Gulf to Gadsden Freight Logistics Zone (FLZ) is just one of Gadsden County, Florida's remarkable economic development assets. The FLZ — the result of a four-county partnership between Gadsden, Gulf, Liberty, and Franklin Counties — takes advantage of the well-established transportation network in the region. The Apalachicola Northern Railroad provides a direct connection from Interstate-10 to the Gulf of Mexico at the Port of Port St. Joe. In addition to a handful of access points to interstates and Class I railroads, Gadsden County will be home to a proposed 600-acre Intermodal Logistics Center (ILC).

**Call today to secure your site within this master planned industrial park.**

Beth Clacchell, CEO, Executive Director  
Gadsden County Development Council  
221 N. Madison Street • Quincy, Florida 32351  
850-212-1056 • [bethkirkland@gadsdentdev.com](mailto:bethkirkland@gadsdentdev.com)

# 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>- Pahokee</li> <li>- Belle Glade</li> <li>- South Bay</li> <li>- Immokalee</li> </ul> </li> </ul>

## INTERNATIONAL TRADE & DEVELOPMENT

During fiscal year 2018-19, 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 724 Florida companies in generating nearly \$1.2 billion in actual and expected sales through our export development programs. Of the 102 countries of destination for these sales, 90 were identified as new markets, underscoring the impact of IT&D's mission to help Florida companies expand and diversify their sales overseas.
- Conducted 49 international business development events statewide and globally with more than 900 Florida participants.
- Provided 5,212 export counseling sessions to 2,457 Florida companies through a network of six trade offices around the state. Of those, 4,083 counseling sessions were with 1,891 companies within EFI's target-industry sectors.

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

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### Trade Missions

EFI's IT&D team organized several trade missions in key markets last fiscal year.

**Kenya & Tanzania** EFI's Africa Trade Expansion Program took a group of 12 Florida companies to Kenya and Tanzania during November 2018 to explore opportunities in these emerging markets. The mission participants engaged in pre-arranged business matchmaking sessions with potential clients from the private sector and government agencies that demonstrated interest in their products and/or services in Nairobi and Dar es Salaam. At each location, the Florida delegation received market and economic briefings from various government officials that provided the group with valuable insights and resources, which served to facilitate an understanding of how business is conducted and opportunities are pursued in each country. The mission delegates secured numerous opportunities and business leads, reporting \$36,566,000 in actual and expected export sales. All of the Florida participants were new to the Kenyan and Tanzanian markets.

**Dominican Republic** IT&D led an export sales mission to Santo Domingo, Dominican Republic in November 2018 with 39 participants from the private and public sectors, including four seaport representatives. The group met with business sector leaders, government officials and Dominican Republic counterparts from the private sector to jointly assess the domestic and, in some instances, regional potential of their products and/or services.

The mission was inaugurated with a welcome reception with the U.S. Ambassador to the Dominican Republic, H.E. Robin S. Bernstein, in attendance. The Ambassador also hosted a reception in her residence, where she welcomed nearly 350 guests, including all mission participants, local entrepreneurs and high-level government officials. In addition to inaugural, informative and networking activities, one-on-one business matchmaking sessions were organized by the U.S. Commercial Service (USCS) in Santo Domingo for 19 Florida companies who reported total export sales of \$11,411,700.

**Morocco** The EFI-led export sales mission to Morocco in April 2019 proved successful for the 10 companies in attendance. More than 80 business-to-business meetings were arranged for the Florida participants with potential distributors and importers in Morocco. Those participants reported \$7,932,000 in actual and expected sales as a result of the business matchmaking meetings.

Mission participants also met with potential clients from the private sector, the Moroccan Ministry of Trade and other government agencies interested in their products and services. The Florida delegation also received market and economic briefings from the USCS and attended a networking event that highlighted the state as a trade and logistics hub for the Americas.

**Israel** In May 2019, Governor Ron DeSantis led a business development mission to Israel, organized by EFI. The delegation included more than 100 companies, organizations, and institutions representing every region of the state. An unprecedented contingent of 13 Florida institutions of higher education highlighted the state's commitment to developing partnerships with their Israeli counterparts that will benefit both Israel and the State of Florida for many years to come.

During the mission, a historic number of more than 20 strategic partnerships and Memorandums of Understanding (MOU) were established. The Governor also met with many leading Israeli companies, led two highly successful roundtable discussions highlighting water challenges and relevant Israeli technologies, and school safety and security, visited cultural sites throughout the nation of Israel, led a ceremonial meeting with members of the Florida Cabinet and met with Prime Minister Benjamin Netanyahu. In addition, several business and networking events were held, along with cultural visits that deepened the ties between Florida and Israel.

**Vietnam** EFI's last trade mission of the year was the export sales mission to Vietnam, visiting both Ho Chi Minh (HCM) City and Hanoi. The mission consisted of 18 participants representing companies throughout Florida, plus delegates from PortMiami and the Tampa area SBDC. There were 18 delegates in the Ho Chi Minh portion and 16 delegates in Hanoi. Ten companies participated in the Gold Key business matchmaking program in both locations, organized by the USCS. These meetings resulted in \$34,283,920 in export sales reported by the participants.

USCS offices in both posts coordinated Gold Key and other events. They served as our official partners and arranged more than 100 Gold Key appointments. Mission events included country commercial briefings in HCM City and Hanoi, Consul General and U.S. Embassy welcoming receptions in both markets, a visit to the Vietnam Chamber of Commerce & Industry in both cities, and a market briefing also provided by the AmCham in Hanoi.

## Partner Trade Events

IT&D also supported four overseas trade events conducted by trade and economic development partners to Africa (Ethiopia, Kenya, South Africa), Chile, Ecuador, and Panama.

## 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 even countries. Trade shows help generate the most export sales for our clients and are an essential component of our export development program.

### Major Overseas Trade Shows Conducted During FY 2018-19

Trade Show/Exhibition	Date	Country	Total Export Sales Reported	Companies Participating
Farnborough International Airshow 2018	7/16/2018	United Kingdom	\$40,850,000	23
Medical Fair Asia 2018-Singapore	8/29/2018	Singapore	\$17,665,000	9
2018 European Attractions Show	9/25/2018	Netherlands	\$29,258,500	8
Gitex 2018	10/14/2018	United Arab Emirates	\$30,900,000	6
MRO Europe 2018-Amsterdam	10/16/2018	Netherlands	\$16,810,000	6
Medica 2018	11/12/2018	Germany	\$143,373,600	23
METS 2018	11/13/2018	Netherlands	\$62,425,000	11
Arab Health 2019	1/28/2019	United Arab Emirates	\$88,225,340	27
Dubai International Boat Show 2019	2/26/2019	United Arab Emirates	\$35,928,550	9
Hospitalar 2019	5/21/2019	Brazil	\$9,430,686	6
EXPO PACK Guadalajara 2019	6/10/2019	Mexico	\$26,522,000	10
Paris Air Show 2019	6/17/2019	France	\$40,000,000	34
Laser World of Photonics	6/24/2019	Germany	\$4,244,000	11
<b>TOTAL</b>			<b>\$545,632,676</b>	<b>183</b>



Farnborough Airshow, U.K.

## Education & 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. By engaging our partners, we are able to cross-promote our programs and services and tap into a broader range of potential clients.

- Last fiscal year, EFI hosted a record 18 individual events including Doing Business in Colombia Roadshow, Go Global with Website Localization and Social Media Marketing and Doing Business in The Dominican Republic.
- Events were held in Broward, Duval, Hillsborough, Miami-Dade, and Orange counties with 470 companies participating.

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

The Florida Export Diversification and Expansion Program offers trade grants to small and medium-sized manufacturers and service providers. 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 five trade grant programs that cover varying costs of the companies' export promotion and development activities. Last fiscal year, 295 such grants were awarded.

### Florida Export Diversification and Expansion Program Trade Grants Awarded During FY 2018-19

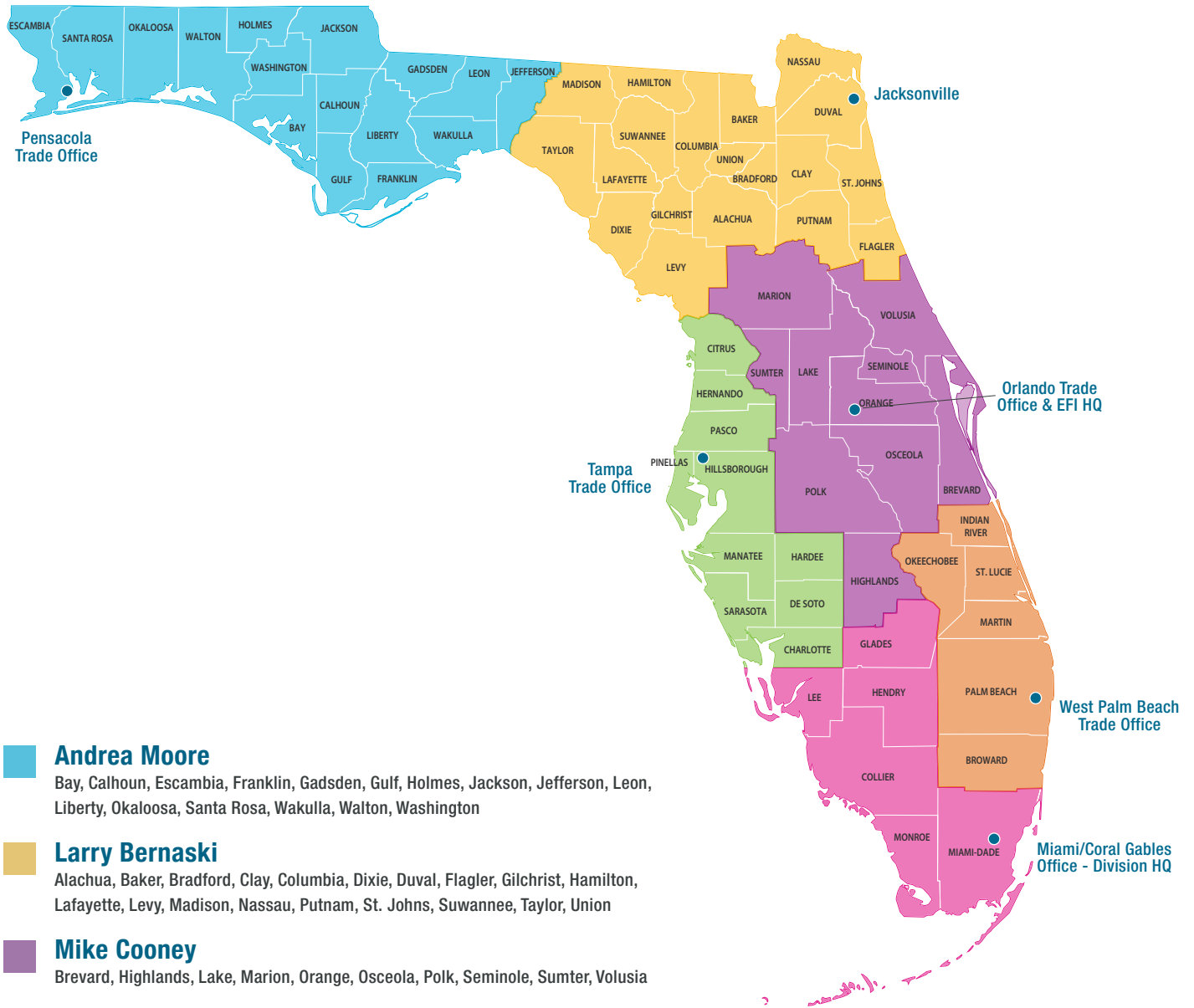
Grant Program	# Awarded
Target Sector Trade Show Grants	178
Reimbursable Gold Key/Matchmaker Grants	85
Export Marketing Plans	25
Website Localization Grants	3
International Registration Grants (launched Fall 2018)	4
<b>TOTAL</b>	<b>295</b>

The success of the program can be seen by the sheer number of new countries that these companies are now exporting to or expect to. Of the 295 grants awarded, 157 companies reported export sales to a total of 85 new markets.

## FY 2018-19 Performance Measures

International Trade	Result	Standard
Number of Florida based businesses assisted by Enterprise Florida for international trade	2,458	2,250
Number of companies with export sales attributable to activities conducted by Enterprise Florida (partial subset of 2.a)	724	260
Amount (US dollar value) of projected export sales attributable to the activities conducted by Enterprise Florida	\$1.18 Billion	\$625,000,000

# FLORIDA TRADE OFFICES



- Andrea Moore**  
 Bay, Calhoun, Escambia, Franklin, Gadsden, Gulf, Holmes, Jackson, Jefferson, Leon, Liberty, Okaloosa, Santa Rosa, Wakulla, Walton, Washington
  
- Larry Bernaski**  
 Alachua, Baker, Bradford, Clay, Columbia, Dixie, Duval, Flagler, Gilchrist, Hamilton, Lafayette, Levy, Madison, Nassau, Putnam, St. Johns, Suwannee, Taylor, Union
  
- Mike Cooney**  
 Brevard, Highlands, Lake, Marion, Orange, Osceola, Polk, Seminole, Sumter, Volusia
  
- Joseph Bell**  
 Charlotte, Citrus, Desoto, Hardee, Hernando, Hillsborough, manatee, Pasco, Pinellas, Polk, Sarasota
  
- John Diep**  
 Broward, Indian River, Martin, Okeechobee, Palm Beach, St. Lucie
  
- Coral Gables Office**  
 Collier, Glades, Hendry, Lee, Miami-Dade, Monroe



## Testimonials

**“Since attending the trade show with EFI's help, we have added 20 new jobs and have opened doors in Japan, Brazil, France, Saudi Arabia, Chile and many more. As a small business, trade grants are critical for our success. We would not be in this position without EFI's help. We have doubled sales in one year and are still growing.”**

Air Quality Aviation, Inc.  
Miami-Dade County  
Wilson Pineros, Owner  
**Paris Air Show 2019**

**“While the support of Enterprise Florida has always been a valuable contributor to our overseas marketing plan that results in export sales, the 2019 Dubai International Boat Show sales for Triton Submarines were a direct result of their grant and assistance. The grant will conservatively result in \$13,000,000 in sales in the coming two years, possibly more. This additional revenue will not only protect the employment of dozens of employees in Indian River County but also provide a solid foundation for further investment potentially leading to the creation of further positions at the company.”**

Triton Submarines, LLC  
Indian River County  
Craig Barnett, Sales and Marketing Manager  
**Dubai International Boat Show 2019**

**“We have gained a great deal of business (millions of dollars) and added scores of workers as a result of Enterprise Florida-sponsored overseas trade shows. I can say this – Enterprise Florida is a great use of my Florida tax dollars! Bravo Enterprise Florida!”**

Orthomerica Products, Inc.  
Orange County  
David Kerr, Chairman & CEO  
**Medical Fair Asia 2018 – Singapore**

**“At Infinium Medical, we cannot stress enough the importance of Medica for our business. This exhibition is one of the only venues where we can connect with our distributors and customers worldwide. Trade grants that we receive help us continue with our participation to these exhibitions. We have increased employment in our company by 20 percent since Medica 2017, and we expect to grow at the same rate after this exhibition. Enterprise Florida plays a key role in our success for our exports and growth.”**

Infinium Medical, Inc.  
Pinellas County  
Oz Ozkaya, President  
**Medica 2018**

## Global Outreach by the Numbers



## Select Results from FY 2018-19 Tradeshows & Missions



## MARKETING & COMMUNICATIONS

**127** Million  
FY 2018-19 Impressions

**19**  
Marketing Channels

**277**  
Special Event Guests

In fiscal year 2018-19, the EFI marketing team continued to promote the state's business story through the "Florida – The Future is Here" campaign, which began in 2016. The campaign generated 127 million impressions worldwide last fiscal year.

The campaign was seen on digital, social and print media platforms around the state, across the country and internationally in the UK and Paris. The marketing team identified new publications and platforms to feature the campaign, targeting the financial, aviation/aerospace and manufacturing sectors, as well as leading business publications. Below are a few of the titles and sites the campaign appeared in:

- Wall Street Journal
- American Way (American Airlines)
- Area Development
- Chief Executive
- C-Suite Quarterly
- Delta Sky (Delta Airlines)
- Florida Trend
- Inc.
- Site Selection
- LinkedIn

To further build on its award-winning library of ads, videos and campaign resources, the marketing team created new ads last year featuring Florida companies and highlighting Florida's workforce and aviation/aerospace, high-tech and manufacturing industries.

The Southern Economic Development Council recognized the campaign with three awards in FY 2018-19, including Best in Class (state), Communications Award Superior, and a Merit Award. The campaign routinely placed in LinkedIn's top 5 of U.S. economic development organizations.

One of the most effective ways to communicate Florida's business advantages is through face-to-face meetings. Nearly a dozen special events were organized and hosted in locations across the country, including Pensacola, Atlanta, Chicago, New York and Washington, D.C. More than 275 company leaders and site selection professionals attended those events, giving statewide economic development partners and EFI's business development team a unique opportunity to have meaningful discussions with key decision-makers.

## Wall Street Journal Power of Place Microsite

The marketing team continued its successful partnership with The Wall Street Journal in FY 2018-19. In its second year, the WSJ- and EFI-branded “Power of Place” microsite features a video and stories highlighting Florida’s business climate, workforce and infrastructure, as well as businesses that have recently relocated to the state. To date, the microsite has highlighted the Tampa, Jacksonville, Panhandle and Central Florida regions, targeting business leaders in the aerospace, manufacturing and IT sectors. The microsite is promoted across the WSJ Studios and EFI social media platforms. From February-March 2019, the microsite and related advertising delivered more than 3.2 million impressions, with a .44 percent clickthrough rate (CTR) across channels (average CTR is .35 percent for similar ads). From October-November 2018, the microsite and related advertising also delivered more than 3.2 million media impressions and reached a .32 percent average CTR.



**BOUNDLESS FREEDOM**

**MANY STATES STRUGGLE TO REDUCE THE BARRIERS TO DOING BUSINESS. WE JUST ELIMINATED THEM ALTOGETHER.**

Consistently ranked one of the best states for business, Florida is committed to keeping regulatory requirements and business taxes low. That, along with a strong economy and zero personal state income tax, makes it a great place to do business. We won't stand in the way of your success. We'll pave the way for it. **Discover what a future in Florida means for your business at [floridathefutureishere.com/freedom](http://floridathefutureishere.com/freedom), or call 877-YES-FLORIDA.**

FLORIDA | THE FUTURE IS HERE.

ENTERPRISE FLORIDA.

*Downtown Tampa*

**BOUNDLESS HEIGHTS**

**FOR AVIATION AND AEROSPACE COMPANIES IN FLORIDA, BUSINESS ISN'T JUST GOOD. IT'S SOARING.**

Nothing is more important to a company's success than its workforce. Nearly 100,000 talented professionals work in Florida's aviation and aerospace industries, and the state is home to 1.5 million highly skilled veterans ready to help your business succeed. So it's no surprise that virtually every major aviation and aerospace company in the world has significant operations here. When it comes to industry growth, the sky's the limit in Florida. **Discover what a future in Florida means for your business at [florida-paris.com](http://florida-paris.com), or call +1 407-555-5600.**

FLORIDA | THE FUTURE IS HERE.

PARIS AIRSHOW  
FLORIDA PAVILION  
HALL 3-B12

ENTERPRISE FLORIDA.

*Embraer Phenom 300, Melbourne, Florida, USA*

**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.

ENTERPRISE FLORIDA.

*I-10 Westbound, Florida's Panhandle*

## FY 2018-19 Performance Measures

Marketing Florida	Results	Standard
Web traffic to EFI's website (overall traffic in visits)	443,361	250,000
Positive media hits	927	700
Total social media channel followers	45,900	21,000
Total media impressions (print, digital, broadcast, out of home)	127,000,000	33,000,000

## Event Highlights

Exhibited  
at  
**4**  
Tradeshows

**8**  
Sector Specific  
Events Sponsored

### In-Market Event

In February of 2019, EFI held a Team Florida in-market event in Washington D.C. for the first time in several years. Nearly 30 guests attended the event, including company leaders in the D.C. area, site selection consultants, Florida economic development stakeholders, and EFI staff members. As EFI and Team Florida had not been to the D.C. market recently, the draw for this event was exceptional. Hosting events like this allows EFI staff and Team Florida partners to engage in one-on-one conversations with government relations professionals and site selection consultants. These events serve as valuable tools for staying ahead of the competition in job creation for the state of Florida. Companies and organizations in attendance: Aerospace Industries Association, Airbus, Amazon, Bombardier, CAE, Duke Energy, General Electric, Gulf Power, Honeywell, JLL, Organization for International Investment, Northrop Grumman, Pinellas County and Santa Rosa County.

### MRO (Maintenance Repair and Overhaul) Americas

MRO is the world's largest and most important MRO event. MRO Americas 2019 featured 800+ industry exhibitors and more than 15,000 attendees at the Georgia International Convention Center. MRO Americas offered unparalleled networking opportunities over the three days of the event and was an ideal event to forge new partnerships and cement existing relationships. EFI's attendance and active participation reinforced Florida as a prime destination for future investment and growth of the MRO segment. EFI hosted an exhibitor space where its business development team held meetings with prospects and performed outreach. Florida's local and regional economic development offices purchased sponsorship packages from EFI to include meeting spaces and participation at state level events.

MRO Americas



Over  
**45**  
Recruitment  
Events Attended

### SelectUSA

SelectUSA is a U.S. government-wide program housed in the International Trade Administration at the U.S. Department of Commerce. The program's stated mission is to facilitate job-creating business investment into the U.S. and raise awareness of the critical role that foreign direct investment plays in the U.S. economy. Participants at the first three Investment Summits have announced more than \$20.6 billion in foreign direct investment into the U.S. between 2014-2016. During the 2019 SelectUSA Investment Summit EFI hosted an exhibitor space where our business development team held meetings with prospects and performed outreach on behalf of Florida. Florida's local communities purchased sponsorship packages from EFI to include meeting spaces and participation at state level events. During SelectUSA 2016, EFI met with GenPact, a professional services company interested in locating an underwriting back office in Florida. The business lead resulted in 200 jobs and \$2.7 million in capital expenditures in Jacksonville which was announced during SelectUSA 2017. In 2018, GenPact then expanded its Jacksonville operation by 95 employees and continues to successfully grow.

Select USA



## BUSINESS DEVELOPMENT

EFI'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 provides site selection services including workforce and demographic information, utility data, community profiles, site visit coordination, and much more. EFI works with business leaders and economic development partners from Florida's 67 counties to attract high quality jobs within the state's targeted industries.

Encouraging the growth of existing Florida companies is also a focus for the division. Retaining and expanding local businesses is central to the mission of economic development and creates a community where business can thrive and high-wage jobs stay in the state.

During fiscal year 2018-2019, the division established 127 business expansion and recruitment projects which are projected to create or retain 14,828 private-sector jobs. Major project announcements in FY 2018-2019 included SR Technologies, Kroger and Ocado, Lockheed Marting, Baker McKenzie, Boeing Space, and Spirit Airlines.

Business Development is seeing an historically average level of project activity, although projects are smaller in both the number of net new jobs and capital investment.

Fostering relationships with business leaders, statewide partners and site selection consultants is a critical element of the economic development process. These relationships generate competitive project leads which in turn facilitate job creation and investment. Florida's opportunity to compete for economic development projects is often the result of existing relationships with industry professionals. Those professionals rely on a central organization to provide the data and assistance they need to make an informed decision.

Specific events to generate leads and build these relationships included visiting consultants in their home markets, attending and sponsoring site selection conferences (CoreNet Global, Industrial Asset Management Council), and business development missions to industry trade shows (Farnborough Air Show, SelectUSA and Semicon West). The division also performed presentations around the state, sharing information on the economic development process with partners and stakeholders. As a result, the division opened 271 new projects during the year.

Business Development was instrumental in developing and implementing the Florida Job Growth Grant Fund with DEO. 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 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 companies along with Fortune 1000 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. This approach will allow EFI's project managers to uncover supply chains that affect companies and work to retain or attract these businesses to the state.



## Jobs by Sector



**Aviation/Aerospace**  
**1,757**



**Life Sciences**  
**1,273**



**Corporate/Regional Headquarters**  
**2,903**



**Logistics/Distribution**  
**1,835**



**Financial/Professional Services**  
**1,025**



**Manufacturing**  
**3,217**



**Information Technology**  
**1,773**



**Other**  
**1,045**

## FY 2018-19 Performance Measures

Business Development: Proposed Job Creation	Results	Standard
Total number of proposed jobs to be created by businesses assisted by Enterprise Florida	14,828	18,000
in rural communities (partial subset of a)	163	300
by international businesses (partial subset of a)	2,440	700
with incentives (partial subset of 1.a) incentives: QTI, CLOSE, HIPI, IIP, CITC, BROWN, RIF	8,485	8,000

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## Business Development Highlights

**Pella Corporation** The Pella Corporation established its first manufacturing facility in Florida in 2019. The company is an innovative leader in the design and construction of windows and doors. EFI and its partners helped Pella find an ideal location in Duval County to locate the facility. The EFI business development team introduced the company to the Department of Revenue and helped them with filing procedures for their sales tax exemptions on manufacturing equipment and electricity used in the manufacturing process. The Pella project created 135 jobs with a capital investment of \$4,000,000.

**Jabil Corporation** In the spring of 2019 the Jabil Corporation announced it would expand operations at its headquarters location in Pinellas County. EFI officials helped the Fortune 500 leader work with state officials to resolve site issues and the process to acquire unused state facilities. The business development team also introduced Jabil to Space Florida and generated conversations regarding various financing methods and how they could potentially work within the framework of the project. Additionally, EFI arranged meetings with state officials to advance the retention and expansion conversation for Florida. The expansion project created 300 high-wage jobs and retained an additional 1,619 positions, as well as a \$67,000,000 capital investment in a new corporate campus.

**Bombardier** This year, EFI assisted Bombardier in expanding its Florida footprint. Bombardier is a global leader in the transportation industry, creating innovative and game-changing planes and trains. The EFI team assisted the company by facilitating conversations with state and local partners in its decision to expand operations in Miami-Dade County. The business development team coordinated conversations with utility partners to assist in offsetting infrastructure and energy costs; and engaged with the company, local, and workforce partners to help obtain training assistance and resources to fulfill its training and hiring needs. Bombardier will retain 167 jobs in Florida while adding more than 100 jobs, nearly doubling the size of its current operations. It is also building a new MRO facility in Miami, resulting in a \$105+ million capital investment.

**Paris Air Show** In June 2019, the EFI business development team led a business recruitment, retention and expansion mission to the Paris Air Show. The show is the largest aviation and aerospace event in the world. The event had over 316,000 visitors, 2,450 exhibiting companies, 300 official delegations, and 140 aircraft for display and demonstration. Florida Secretary of Commerce Jamal Sowell, along with EFI's business development team, participated in more than 50 meetings with both domestic and international companies during the show. Many of the companies are top aerospace and defense leaders from around the world. Meetings consisted of discussions around existing Florida facilities and expansion opportunities, while others served as prospecting/recruitment meetings. In addition, EFI co-hosted an Aerospace Alliance event to bring industry and economic development leaders together to foster discussions and relationships for the growth of the aerospace industry in the southeast U.S. EFI also participated in events hosted by the U.S. Aerospace Industries Association, which were comprised of government, military and industry leaders in the U.S. aerospace and defense sector.

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## Project Announcements

**“We chose Sunrise due to the support the area has for our company's needs and the new development happening in this community.”**

- Rick Lund, Chairman and  
Founder of SRT

### SR Technologies to Create 40 Jobs at New Headquarters in Broward County

Broward County, Fla. (October 17, 2018) – SR Technologies, Inc. a division of SRT Group, announced today that it has selected Sunrise for its new headquarters. SRT will create 40 jobs and retain 161 positions. The company will also invest approximately \$1 million in the local community.

Rick Lund, Chairman and Founder of SRT said, “Our company has been experiencing strong growth and it was imperative for us to secure a centralized headquarters location. We chose Sunrise due to the support the area has for our company’s needs and the new development happening in this community. We are pleased and excited to call Sawgrass Technology Park home for SRT. The location provides us with the room we needed to grow our company, and we are happy that we continue to be a part of the South Florida business community as we enter our twenty-first year in business.”

SR Technologies cited the accessibility of software engineering talent as a key driver for choosing Sunrise. The company specializes in design, engineering, and research and development for wireless communications. Other locations in consideration were Virginia, the District of Columbia and Maryland. SRT Group will occupy a 77,116-square-foot office space at Sawgrass Technology Park, expanding its footprint by 40,000 square feet in the new location.

A true economic super-state, Florida is a \$1 trillion economy and the 17th largest economy in the world, if considered a country. Companies across all industries can benefit from its huge market, and large and diverse workforce. In addition, its low corporate tax burden, no personal income tax, and modern infrastructure provide the ideal business location.

This project was made possible through strong partnerships between EFI, the Florida Department of Economic Opportunity, Broward County, the City of Sunrise and the Greater Fort Lauderdale Alliance.

Mayor Mike Ryan of the City of Sunrise said “Sunrise has become the location of choice of technology companies and global headquarters for the corporate world. We look forward to celebrating the success of SR Technologies in Sunrise.”

Bob Swindell, President and CEO of the Greater Fort Lauderdale Alliance said, “SR Technologies choice to add new, high-value tech jobs in Sunrise reaffirms the strength of our community as a talent hub for technology and other high-value industries.”

## Kroger and Ocado to Locate Customer Fulfillment Center in Lake County

GROVELAND, Fla., (March 19, 2019) – The Kroger Co. (NYSE: KR), America’s largest grocery retailer, and Ocado (LSE: OCDO), one of the world’s largest dedicated online grocery retailers, today announced Groveland, Lake County, Florida, as the second location for one of their Customer Fulfillment Centers (CFC).

“Kroger is incredibly excited to construct one of our industry-leading Customer Fulfillment Centers in Groveland, Florida—a city west of Orlando—through our relationship with Ocado,” said Alex Tosolini, Kroger’s senior vice president of new business development. “Through our strategic partnership, we are leveraging advanced robotics technology and creative solutions to redefine the customer experience across America.”

Kroger has committed to building 20 CFCs, powered by Ocado, to accelerate its ability to provide customers with anything, anytime and anywhere. The CFC model – an automated warehouse facility with digital and robotic capabilities, also known as a “shed” – will be replicated to serve customers across America. Last month, the retailer announced plans to build two additional CFCs in Central Florida and Mid-Atlantic. America’s first CFC will be constructed in Monroe, OH, a suburb north of Cincinnati.

“The City of Groveland welcomes Kroger and Ocado,” said Mayor Evelyn Wilson. “We see it as another component to our overall community development and it demonstrates the City’s commitment to foster quality jobs and provide exceptional livability.”

“Lake County, in partnership with the City of Groveland, is thrilled to welcome Kroger and Ocado to our community. This technologically advanced venture will put Lake County on the cutting edge of the e-commerce industry. Kroger will bring more than 400 high paying jobs to be fulfilled by our local and regional skilled workforce and is precisely the type of company we have been working to attract,” stated Lake County Board of County Commissioners Chairman Leslie Campione.

“Enterprise Florida is thrilled Kroger and Ocado have decided to locate their new customer fulfillment center in Central Florida. We look forward to your success here in the Sunshine State,” said Jamal Sowell, President & CEO of Enterprise Florida, Inc.

“Kroger thanks State of Florida, Groveland and Lake County officials for their tremendous support of this project,” added Tosolini. “We’re eager to transform the grocery experience for Central Florida residents through innovation and ingenuity.”

The Groveland CFC will be located at U.S. Highway 27 and American Way and occupy 375,000 square feet. The CFC is scheduled to break ground later this year and be operational in 2021.

**“We’re eager to transform the grocery experience for Central Florida residents through innovation and ingenuity”**

- Alex Tosolini,  
Senior Vice President, Kroger

## MILITARY AND DEFENSE

EFI'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 (FDA) and the Florida Defense Support Task Force (FDSTF). 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.



Blue Angels over Florida

In 1998, the Legislature created the FDA and the defense grants program under EFI. 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, the FDA, the FDSTF and the state's Defense Grants Program.

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 Executive Office of the Governor, 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 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 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 whose legislative terms end sooner.

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 2018-19, the Legislature appropriated \$2,000,000 to the task force to carry out their mission. The task force awarded six grants totaling \$1,380,000 to improve the military value of Florida's installations.

FDSTF conducted 10 meetings and visited military bases around the state during the year. 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.

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## Florida Defense Alliance (FDA)

### Successes

- FDSTF awarded 61 grants worth more than \$13,800,000 since 2012 to strengthen military installations and prevent encroachment
- 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 2019 Florida Military Friendly Guide providing a summary of the laws and programs that benefit service members and families stationed in Florida

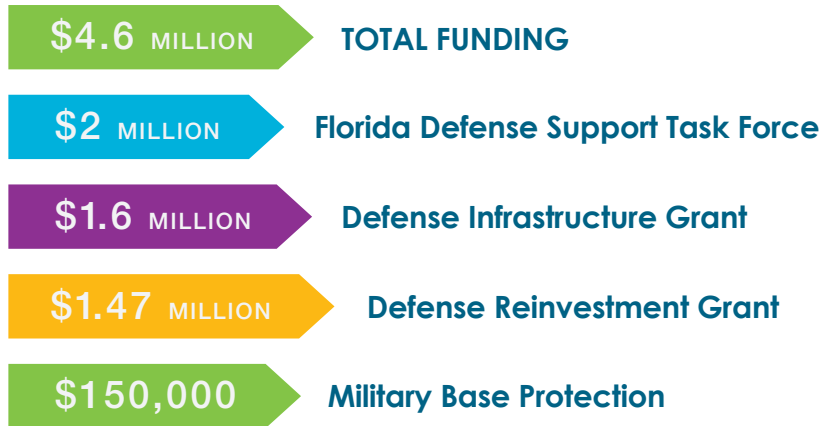
The FDA, an organization within EFI, is a volunteer grassroots alliance that represents local defense communities around the state and ensures that Florida, its resident military bases and missions, and its military host communities are in competitive positions as the United States continues its defense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

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

Currently, there is no direct funding for the FDA. Administrative costs for this entity are underwritten by EFI.

Despite the lack of funding, the FDA continues to raise issues from local defense communities to improve the quality of life for service members and their families serving in Florida. This is reflected in the Florida Military Friendly Guide, summarizing the benefits of military service in Florida.

# Supporting Florida's Military



## ESCAMBIA

**Naval Air Station Pensacola, Corry Station, Saufley Field**  
Total County Impact: \$7,184.1 billion  
Employment: 63,293 jobs  
Capital Investment: \$708.6 million

## OKALOOSA

**Eglin Air Force Base, Hurlburt Field**  
Total County Impact: \$8,816.5 billion  
Employment: 71,780 jobs  
Capital Investment: \$891.3 million

## HILLSBOROUGH

**MacDill Air Force Base, U.S. Central Command, U.S. Special Operations Command**  
Total County Impact: \$8,869.3 billion  
Employment: 72,636 jobs  
Capital Investment: \$985.8 million

## HIGHLANDS

**Avon Park Air Force Range**  
Total County Impact: \$92.5 million  
Employment: 1,487 jobs  
Capital Investment: \$24.2 million

## SANTA ROSA

**Naval Air Station Whiting Field**  
Total County Impact: \$1,190.5 billion  
Employment: 13,369 jobs  
Capital Investment: \$314.2 million

## BAY

**Naval Support Activity Panama City, Tyndall Air Force Base**  
Total County Impact: \$2,393.0 billion  
Employment: 22,561 jobs  
Capital Investment: \$286.2 million

## PINELLAS

**United States Coast Guard Air Station Clearwater**  
Total County Impact: \$8,869.3 billion  
Employment: 72,636 jobs  
Capital Investment: \$985.8 million

## POLK

**Avon Park Air Force Range**  
Total County Impact: \$881.0 million  
Employment: 10,981 jobs  
Capital Investment: \$177.0 million

## MONROE

**Naval Air Station Key West**  
Total County Impact: \$1,006.1 billion  
Employment: 8,606  
Capital Investment: \$103.9 million

## DUVAL

**Naval Air Station Jacksonville, Naval Station Mayport, Marine Corps Support Facility Blount Island**  
Total County Impact: \$11,474.6 billion  
Employment: 101,500 jobs  
Capital Investment: \$1,085.4 billion

## CLAY

**Camp Blanding Joint Training Center**  
Total County Impact: \$654.5 million  
Employment: 9,167 jobs  
Capital Investment: \$184.1 million

## ORANGE

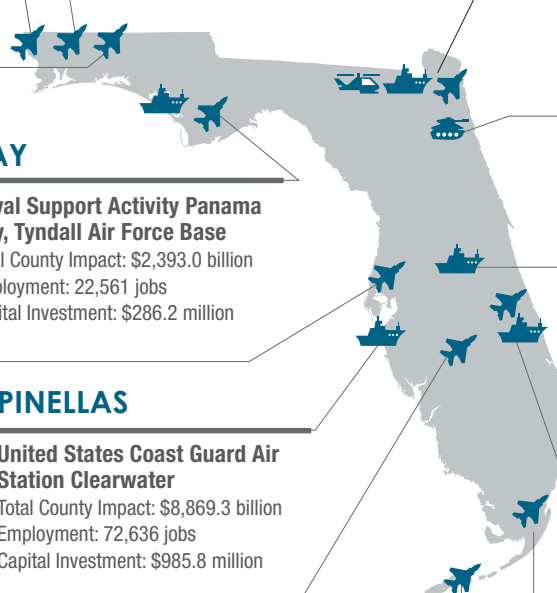
**Naval Support Activity Orlando: Multi-Service Modeling, Simulation and Training Acquisition**  
Total County Impact: \$7,208.7 billion  
Employment: 65,341 jobs  
Capital Investment: \$718.6 million

## BREVARD

**Patrick Air Force Base, Cape Canaveral Air Force Station, Naval Ordnance Test Unit**  
Total County Impact: \$4,547.4 billion  
Employment: 41,029 jobs  
Capital Investment: \$556.2 million

## MIAMI-DADE

**United States Southern Command, Homestead Air Reserve Base, 7th Coast Guard District Headquarters**  
Total County Impact: \$5,578.3 billion  
Employment: 56,476 jobs  
Capital Investment: \$640.0 million



## Recent Success Stories as a Result of Task Force Grants



In 2019, the FDSTF awarded \$644,000 through the Task Force Grant Program to support two defense projects in two counties. The intent of the grant program is to provide funding to support the mission of the task force in preserving, protecting and enhancing Florida's military installations as well as improving 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.

- The task force awarded the Clay County Development Authority \$500,000 to purchase interests in land that falls within the approved Army Compatible Use Buffer around Camp Blanding Joint Training Center. By using Department of Defense REPI program funds plus matching funds from the FDSTF grant program, the Clay County Development Authority will be able to extend the buffer around the base to areas that were previously vulnerable to incompatible land development and encroachments on the base's mission. This will ease strained relations with nearby residents improving the military friendly environment in Clay and/or Bradford County.
- The task force awarded a \$144,00 grant to Gulf Coast State College to conduct an Environmental Impact Study with Scoping/Strategy for the planned Tyndall Air Force Base (AFB) MQ-9 Reaper mission. The USAF selected Tyndall as the preferred alternative location to host a new MQ-9 Reaper wing which will bring 24 aircraft and an estimated 1,600 jobs to the area. Prior to bringing in this new mission the site must complete an environmental impact study. This grant serves to keep that task on schedule and reinforces the need to rebuild Tyndall following Hurricane Michael.

### Florida Defense Support Task Force Board FY 2018-19

#### Governor Appointees

Admiral Mark Fitzgerald, U.S. Navy, Retired

Commissioner Barbara Stewart

Representative Holly Raschein

Ms. Amy Gowder

#### Senate President Appointees

Mr. Tom Neubauer

Senator Doug Broxson

Major General Richard Haddad, U.S. Air Force, Retired

Lieutenant Colonel William Dudley, U.S. Air Force, Retired

#### House Speaker Appointees

Representative Jay Trumbull-Chairman

Brigadier General Arthur F. Diehl, III, U.S. Air Force, Retired

Representative Clay Ingram (term expired Nov. 6, 2018), replaced by Representative Thad Altman (appointed Jan. 7, 2019)

Colonel Jim Heald, U.S. Air Force, Retired

#### Governor's Personal Representative

Major General Michael A. Calhoun, U.S. Army, the Adjutant General of Florida (served until Governor DeSantis' inauguration, Jan. 8, 2019)



## MINORITY & SMALL BUSINESS SUPPORT

EFI's Minority and Small Business, Entrepreneurship and Capital division partners with outside organizations to provide small, minority and entrepreneurial companies with training, development and financing options.

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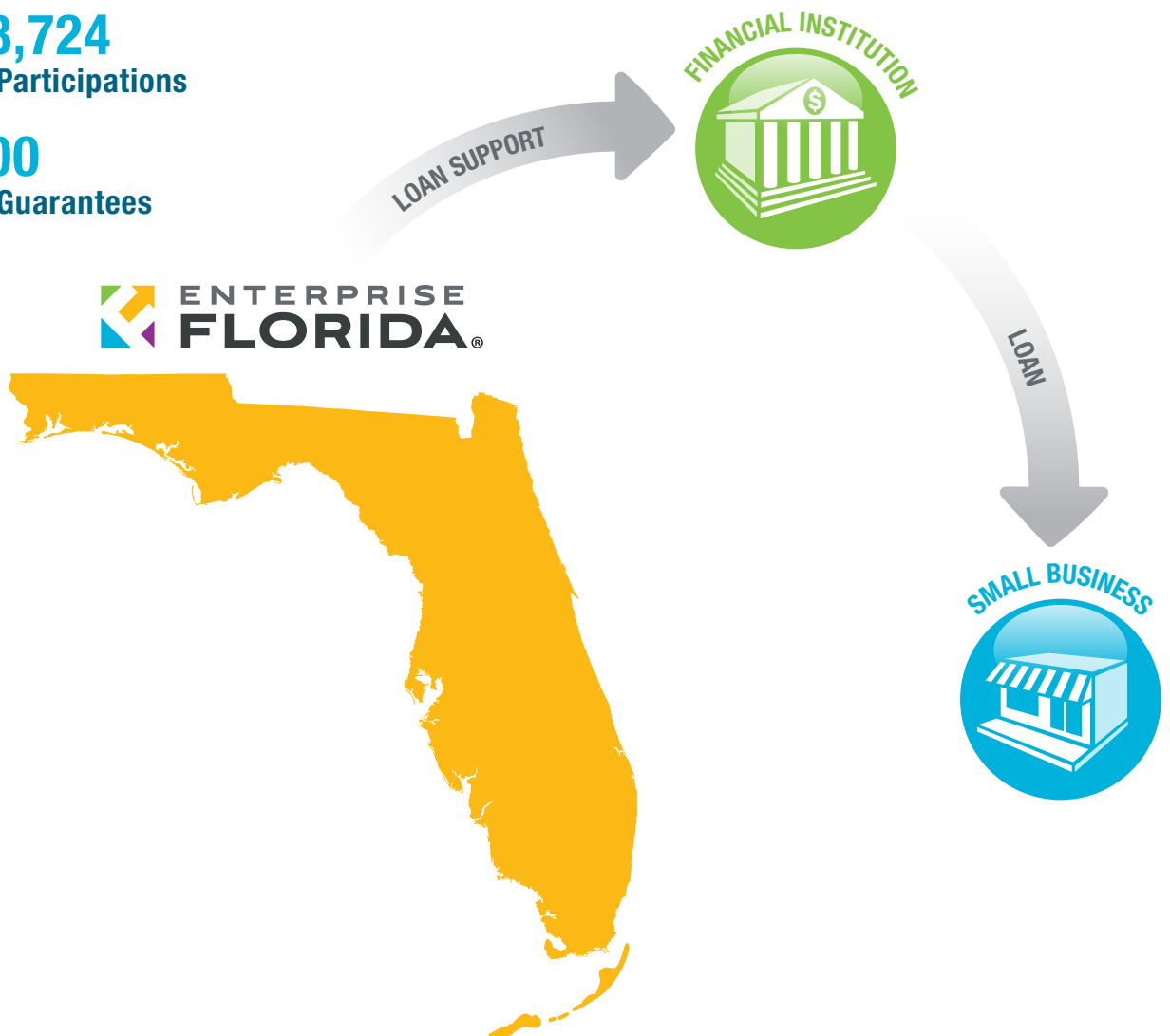
**Small Business Jobs Created Through Loan Participations & Guarantees**

**\$19,948,724**

**SSBCI Loan Participations**

**\$166,000**

**SSBCI Loan Guarantees**



### FY 2018-19 Final Performance Measures

Minority and/or Small Business, Entrepreneurship and Capital (MaSBEC)	Results	Standard
Number of businesses that received financial assistance	6	6

## FLORIDA SPORTS FOUNDATION

### MISSION

The Florida Sports Foundation (FSF), a division of EFI, is a 501(c)(3) non-profit corporation and is the official sports promotion and development organization for the State of Florida. It is charged with the promotion and development of professional, amateur, recreational sports, and physical fitness opportunities that produce a thriving sports industry and environment. The mission of FSF is to:

1. Provide grants\* to support sporting events that bring out-of-state visitors to Florida;
2. Produce and distribute annual golf, fishing and boating, and baseball spring training guides for both in-state and out-of-state tourists; and
3. Organize the annual Sunshine State Games, an Olympic-style festival for Floridians of all ages, and the Florida Senior Games State Championships for senior athletes, age 50 and over.

*\*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.*

### BUDGET

More than half of the FSF budget is based on state revenue from legislative appropriations, which is appropriated through a contract with 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 nine pro teams are deposited (up to \$3,000,000);
- 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 for this year ended at \$3,000,000, an increase over the previous year of 6 percent. The maximum spending authority of the trust fund was reached for the first time. The total budgeted state revenue for the year totaled \$4,718,250, an increase of \$38,261. The total state revenue received totaled \$4,756,511. Outside of the percentages allocated to FSF from USTA and NASCAR tag revenue, the remainder of revenue for those tags is unbudgeted.

General operations and administration of FSF are funded privately, and totaled \$988,140 for the year, \$42,860 under the budgeted \$1,031,000.



## 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 FSF 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 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 Program is designed to assist communities in attracting legitimate event rights holders to market Florida and generate viable event leads.

## GRANT AWARDS

Understanding the importance of sports tourism at the local level, the FSF awarded these grants to 27 industry partners in 8 regions. 103 of the grant activities were scheduled to take place during the FY, and 34 were scheduled to take place beyond the FY.

### FY 2018-19 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	36	34	33	\$ 499,466	\$ 221,630,166	147,106	\$ 444
1st Qtr-SMG (Minor)	2	2	2	\$ 500,000	\$ 43,349,632	23,265	\$ 87
1st Qtr-SMG (Minor)	5	5	5	\$ 19,00	\$ 2,859,365	4,617	\$ 147
1st Qtr-SICA (Minor)	2	2	2	\$ 20,000	\$ 701,509	620	\$ 35
2nd Qtr-Major	29	19	28	\$686,525	\$141,678,120	215,654	\$ 206
2nd Qtr-SMG (Minor)	12	11	11	\$ 28,875	\$ 7,071,378	15,626	\$ 245
2nd Qtr-SICA (Minor)	1	1	1	\$ 5,000	\$ 35,177	50	\$ 7
3rd Qtr-Major	24	24	23	\$ 430,250	\$ 183,510,420	174,917	\$ 427
3rd Qtr-SMG (Minor)	6	6	6	\$ 22,385	\$ 2,993,221	5,429	\$ 134
3rd Qtr-SICA (Minor)	3	3	3	\$ 14,000	\$ 5,788,569	7,341	\$ 413
4th Qtr-Major	19	19	19	\$ 263,580	\$ 92,665,598	87,451	\$ 352
4th Qtr-SMG (Minor)	3	3	3	\$ 8,820	\$ 947,717	1,756	\$ 107
4th Qtr-SICA (Minor)	1	1	1	\$ 10,000	\$ 2,964,105	2,300	\$ 296
<b>TOTALS FOR YEAR</b>	<b>143</b>	<b>140</b>	<b>137</b>	<b>\$ 2,508,401</b>	<b>\$ 706,194,977</b>	<b>686,132</b>	<b>\$ 282</b>

## Awards by Region

Region	# Awarded	Amount Awarded	Projected Out-of-State Impact	# Projected Out-of-State Visitors
Central	35	\$ 796,772	\$ 216,925,145	288,594
Central Eastern	10	\$ 90,225	\$ 45,751,498	43,682
Central Western	14	\$ 366,000	\$ 46,813,812	46,605
North Central	3	\$14,230	\$ 1,612,590	3,432
North Eastern	1	\$ 53,650	\$ 8,629,509	6,840
North Western	10	\$ 72,475	\$ 12,261,269	17,336
South Eastern	45	\$ 878,319	\$ 243,929,086	198,881
South Western	19	\$ 236,730	\$ 60,950,760	80,962
<b>Totals by Region for FY 2017/18</b>	<b>137</b>	<b>\$ 2,508,401</b>	<b>\$ 636,873,671</b>	<b>686,332</b>

## MAJOR EVENT GRANTS

- 2021 College Football Playoff National Championship Game, 01/07-11/2021—\$1,100,000
- Super Bowl LV, 01/31-02/07/2021— \$1,500,000

The full amount was awarded, but to be contracted over three years. This first year, \$25,000 was paid out to each grantee.

## COMPLETED GRANTED EVENTS

In Fiscal Year 2018-19, FSF invested \$2,775,236 in a total of 128 sporting event grants from multiple award years, which took place and were completed during the year.

## Completed Granted Events

Amount Paid	Out-of-State Impact	# Out-of-State Visitors	# Taking Place	ROI	Jobs
\$ 585,744	\$ 130,802,703	124,647	23	\$ 223	1,466
\$ 954,768	\$ 191,581,147	210,800	42	\$ 201	2,480
\$ 570,057	\$ 249,165,516	150,249	27	\$ 437	1,768
\$ 664,667	\$ 223,968,000	205,779	36	\$ 337	2,421
<b>\$ 2,775,236</b>	<b>\$ 795,517,366</b>	<b>691,475</b>	<b>128</b>	<b>\$ 287</b>	<b>8,135</b>

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## COMPLETED GRANTED EVENTS HIGHLIGHTS

### Major Events

Florida was host to these granted major events during the year:

- Camping World Kickoff, Sept. 1, 2018, Orlando
  - Award: \$300,000
  - \$55,747,835 impact with 40,450 visitors
- Capital One Orange Bowl, Dec. 31, 2018, Miami
  - Award: \$400,000
  - \$79,994,484 impact with 56,825 visitors
- NFL Pro Bowl 2019, Jan. 20-27, 2019, Orlando
  - Award: \$300,000
  - \$26,387,677 impact with 25,769 visitors
- Winter Equestrian Festival, Jan. 9–March 23, 2019, Palm Beach
  - Award: \$60,000
  - \$96,321,050 impact with 18,930 visitors
- Monster Jam World Finals, May 10-11, 2019, Orlando
  - Award: \$110,000
  - \$18,215,363 impact with 14,425 visitors

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## AMATEUR SPORTS PROGRAMS

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### Florida Senior Games (FSG)

Every year, the FSF sanctions the FSG Series Qualifiers, in Florida, which lead up to the FSG in December. Twenty-one FSG qualifiers were held with more than 18,000 attendees representing more than \$3,400,000 in local community impact. The 2018 FSG saw more than 5,600 attendees, with athletes participating in 24 sports, and brought \$1,300,000 in local community impact. Athletes came from 200+ Florida cities, 46 states, Barbados, Canada, the Cayman Islands, the Netherlands, Slovakia, Trinidad & Tobago, and the United Kingdom. The two programs combined to bring more than \$4,700,000 in direct impact to local communities.

The Games also served as a qualifier for the bi-annual National Senior Games. In June 2019, 687 Floridians traveled to Albuquerque, New Mexico, where the Sunshine State's athletes competed and brought home 450 medals, third-most among the 50 states. The next National Senior Games, presented by Humana, are coming to Florida in 2021.

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## FSG Highlights

In 2018, 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: Leurene Hildenbrand, of Pinellas Park (Horseshoes, Pickleball, Shuffleboard, Table Tennis); James White of Naples (Pickleball); Karen Westerman, of St. Petersburg (Cycling, Swimming, 5K Road Race); and Claudette Braswell, of Lake Wales (Bag Toss, Basketball Shooting, Horseshoes) honorees are: Shirley Chase, 92, Swimming; Brian Hankerson, 58, Track & Field; Leurene Hildebrand, 85, Track & Field; and Charles Madge, 90, Golf.

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## Sunshine State Games (SSG)

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. Last year, more than 29,000 attendees took part in 48 sporting events in 20+ different communities, creating more than \$6,200,000 in local community impact.

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## SSG Highlights

The 2019 SSG Water Polo Championships brought 59 teams from Florida, Ecuador, Trinidad & Tobago, and Barbados to venues in Broward County. With approximately 1,000 athletes, the SSG Water Polo Championship is the largest annual water polo tournament in the Southeast ranging in age groups from 10 and under to Open Men's and Women's Divisions.

## 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

Brandenton Area Sports Commission	Greater Miami CVB	Polk County Sports Marketing
Broward County Sports Development	Greater Orlando Sports (CFSC)	Punta Gorda/Englewood Beach VCB
Citrus County Sports Development	Jacksonville Sports Council	Santa Rosa County Board of Commissioners
Columbia County Sports Commission	Lee County Sports Development	Sarasota County Sports Commission
Daytona Beach Area Convention & Visitors Bureau	Naples, Marco Island & Everglades CVB	St. Pete/Clearwater Sports Commission
Emerald Coast Convention & Visitors Bureau	Ocala/Marion County VCB	Tallahassee Sports Council
Experience Florida's Sports Coast-Pasco County	Orlando North Seminole County Sports	Tampa Bay Sports Commission
Experience Kissimmee	Palm Beach County Sports Commission	Treasure Coast Sports Commission
Florida Citrus Sports & Events	Palm Coast and the Flagler Beaches	Visit Orlando Sports
Florida's Space Coast Office of Tourism	Panama City Beach CVB	
Gainesville Sports Commission	Pensacola Sports	

## SPORTS DEVELOPMENT HIGHLIGHTS

### Florida Sports Annual Summit

The FSF invites its partners to attend an annual summit, where representatives of the nation's top sports event rights holders present their events. This year's summit was held in Destin May 20-22. FSF presented industry awards to partners and held workshops with nearly 100 attendees representing more than 20 events.

### 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 (MLB) and is a celebration of Major League and Minor League Baseball in the State of Florida featuring guest speakers, including the Governor. The 2019 Governor's Baseball Dinner was held February 17, 2019 at the Kravis Center in West Palm Beach to celebrate another season of spring training. The dinner was attended by more than 350 guests, including former major leaguers, Florida Legislators, MLB Commissioner Rob Manfred and Governor Ron DeSantis.

## FY 2018-19 Performance Measures

Florida Sunshine State Games and Florida Senior Games State Championships (In-State)	Result	Standard
Economic contributions to communities as a result of hosting Florida's Senior State Games and Sunshine State Games Championships	\$ 11,016,275	\$ 7,000,000
Number of participants, (athletes & families), competing in & attending Florida's Senior State Games and Sunshine State Games Championships	53,951	40,000
Regional and Major Sporting Event Grants (Out-of-State)	Result	Standard
Economic contributions from Florida Sports Foundation sponsored sporting event grants	\$ 795,517,366	\$ 2,000,000
Number of attendees at the sponsored grant events	691,475	300,000

## ATTACHMENTS

Additional **Florida Sports Foundation** reports are separate documents and can be found at:

<https://playinflorida.com/deo-reports/>

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

**A. International Offices Annual Report Fiscal Year 2018-19**

<https://www.enterpriseflorida.com/wp-content/uploads/Final-FY-2018-19-International-Offices-Report-11-04-2019.pdf>

**B. Fiscal Year 2018-19 Customer Satisfaction Survey**

<https://www.enterpriseflorida.com/wp-content/uploads/C3R-Enterprise-Florida-Client-Satisfaction-Survey-Results-Report-2019-.pdf>

**C. Fiscal Year 2018-19 Audit Report**

<https://www.enterpriseflorida.com/wp-content/uploads/EFI-Audit-Reports-and-Notes-FY-2019-Issued.pdf>

**D. Florida Export Finance Corporation Annual Report Fiscal Year 2018**

<https://www.enterpriseflorida.com/wp-content/uploads/FEFC-Annual-Report-2018.pdf>

**E. Visit Florida Annual Report Fiscal Year 2018-19**

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



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