

Analysis of the Florida Film and Entertainment Industry

Prepared for: The Governor's Office of Film & Entertainment
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Data Limitations

Much of the data reported in this study were acquired from secondary data sources and were not collected by the Haas Center. While the Haas Center believes that these sources are generally accurate, we have no way of independently ascertaining the reliability of the data collected or the collection methods used. Readers of this report should bear this in mind when using this material.

State incentive information is current as of December, 2008.

Interview and survey information were collected using contact information developed from the 2007-08 Film Florida Production Guide. Given the random nature and length of time allotted for the survey interview process, those with the most knowledge of the Florida industry may not have been contacted or available for inclusion.

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Executive Summary

The Governor's Office of Film and Entertainment commissioned the Haas Center for Business Research and Economic Development at the University of West Florida to analyze the Film and Entertainment Industry within the State of Florida. This study is an update and expansion of the prior 2003 study performed by Economic Research Associates that established a baseline of the size and extent of the industry in Florida.

For purposes of this study, the following North American Industry Classification System codes are used to identify the employment components of the Film and Entertainment Industry:

- a. 512110 – Motion Picture and Video Production
- b. 512120 – Motion Picture and Video Distribution
- c. 512191 – Teleproduction and Other Postproduction Services
- d. 512199 – Other Motion Picture and Video Industries
- e. 512210 – Record Production
- f. 512240 – Sound Recording Studios
- g. 512290 – Other Sound Recording Industries
- h. 515120 – Television Broadcasting
- i. 515210 – Cable and Other Subscription Programming
- j. 541810 – Advertising Agencies
- k. 541922 – Commercial Photography
- l. 711130 – Musical Groups and Artists
- m. 711410 – Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
- n. 711510 – Independent Artists, Writers, and Performers
- o. 334612 – Prerecorded Compact Disc (except software), Tape, Record Reproducing

The Film and Entertainment Industry also includes a portion of the digital media industry, and the importance of this sector was included in examining the industry as a whole.

The State of Florida has a long history in the motion picture industry thanks to its year-round sunshine, moderate climate and spectacular scenery. Overall, the Film and Entertainment Industry is important to the Florida economy as a major driver of employment and personal income, attracting revenue from other states and countries to be spent locally on wages and film production services. For example, when a major studio shoots a big budget film on location, it can inject, according to the Motion Picture Association of America (MPAA), as much as \$225,000 per day into that location's economy.

Industry Trends

The US movie and home entertainment business, according to Standard and Poor's, is experiencing sustained growth due to expanding audiences, pipelines, and content. The economics of the movie and home entertainment industry are also undergoing long-term changes as technological developments

have altered and expanded distribution channels. Hollywood's movie studios and the television networks are actively seeking to exploit the expanding universe of direct-to-consumer online distribution channels for video.

The economics of the movie and home entertainment industry are undergoing long-term changes as technological developments have altered and expanded distribution channels. Hollywood's movie studios and the television (TV) networks are actively seeking to exploit the expanding universe of direct-to-consumer online distribution channels for video.

In the TV business, cable networks have been gaining a greater share of viewers and advertising dollars from the broadcast networks. Their purchases of high-profile programming are increasing, boosting their competitive position even further.

In the video and music industries, Internet downloading and digitally recorded discs have eclipsed older technologies. Discs' image and sound quality, playback features, and durability are superior to those of tape. Increasingly, consumers are making personal recordings at home directly onto their computers or wireless handheld devices.

Entertainment delivery mechanisms are changing. Just as radios and record players brought musical entertainment out of the concert hall and into the home, so has cable programming, DVD's and streaming video brought filmed entertainment out of the movie theater. With this shift has come increased demand for content. Future trends for the industry include financing of multiple projects with the same company; continued interest in special effects laden entertainment; video and music on-demand; direct to DVD production; the convergence of several different entertainment medias into one product; niche and micro marketing; product placement, growth in the gaming industry and restructuring of the music industry business model.

Employment

In order to better understand the extent of the industry within Florida, employment data was analyzed at the 6-digit NAICS industry level from the Quarterly Census of Employment and Wages (QCEW). The QCEW program publishes a quarterly count of employment and wages reported by employers covering 98 percent of U.S. jobs, available at the county, MSA, state and national levels by industry. Jobs that are exempt or otherwise not covered by unemployment insurance are not included in the QCEW tabulations.

While QCEW captures the majority on employment in most industries, the Film and Entertainment Industry is actually dominated by freelance and independent contractors. One component of the Florida film and entertainment industry, for example, is the Independent Artists, Writers and Performers industry (NAICS 711510). The formal definition of this industry encompasses many freelance actors, writers, producers and others not covered by unemployment insurance programs. Thus it should be noted that QCEW data may grossly underestimate the number of workers in this sector. See Appendix B of this report.

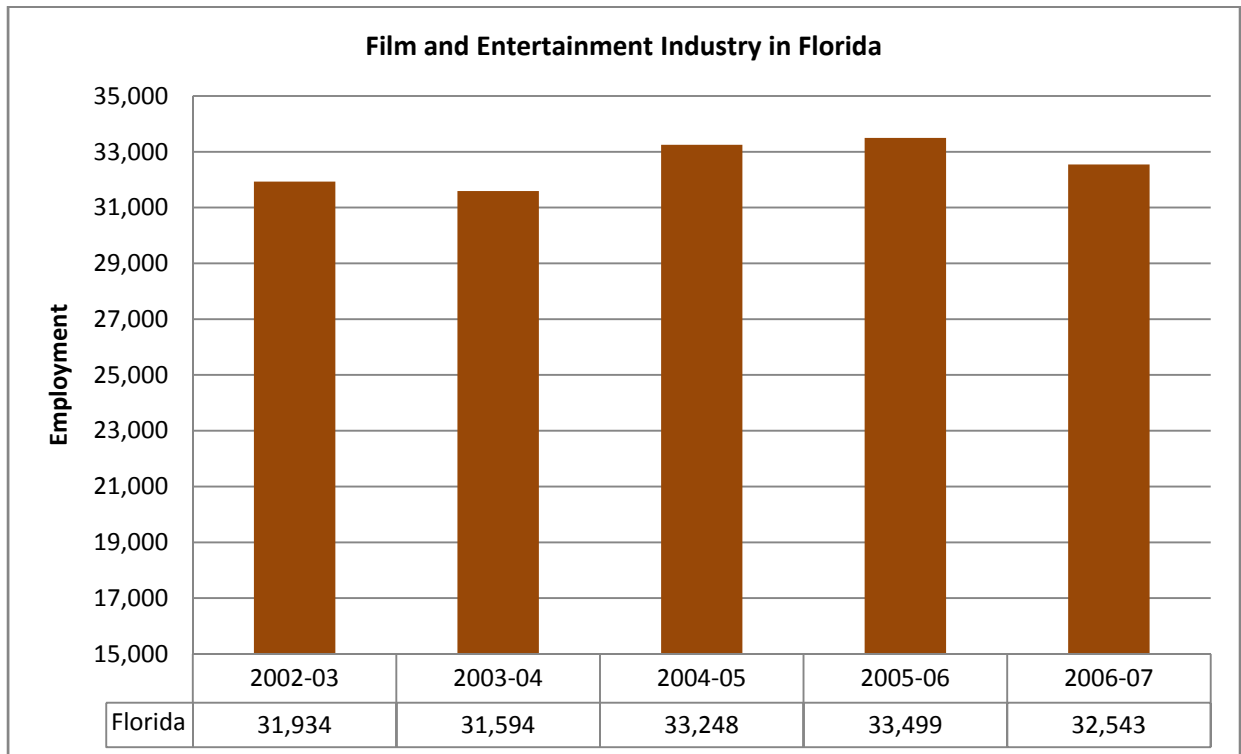
Establishments

Establishment data was also taken from the QCEW data. An establishment is an economic unit, such as a farm, mine, factory, or store that produces goods or provides services. It is typically at a single physical location and engaged in one, or predominantly one, type of economic activity for which a single industrial classification may be applied.

Economic Importance

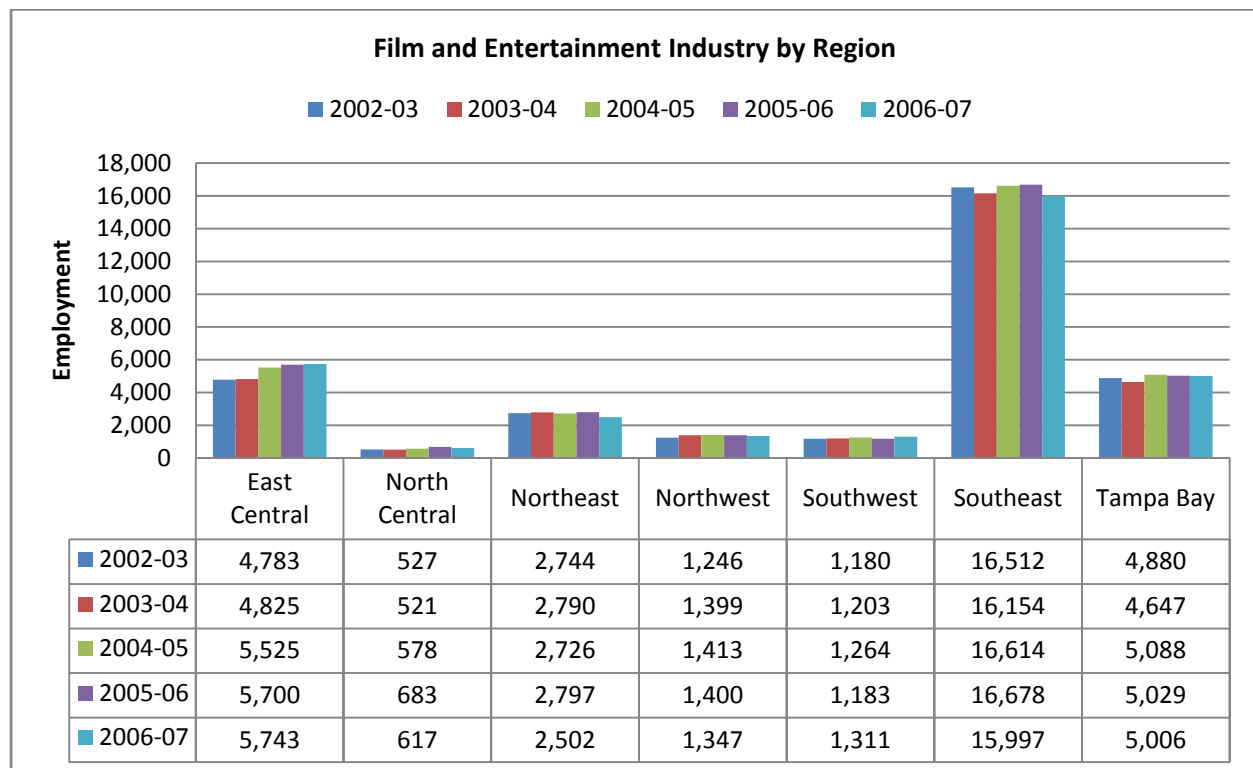
Economic importance was measured using location quotients for 2002 and 2007. In general, location quotients are ratios that compare the concentration of a resource or activity, such as employment, in a defined area to that of a larger area or base. For example, location quotients can be used to compare State employment by industry to that of the nation; or employment in a city, county, metropolitan statistical area (MSA), or other defined geographic sub-area to that in the State. The location quotients in the table below compare the employment concentration in the selected county or region to the nation as a whole.

A location quotient greater than one implies that the industry is producing more goods and services than are consumed locally. Thus, the industry must be a net exporter of the goods or services to non-local consumers, and in the process, bringing outside spending into the local area. A high location quotient is indicative of a comparative advantage for that particular business sector relative to other areas in the country. See figures below.



	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Florida	16,692	17,910	21,023	22,136	22,597	35%	0.86	0.84

Employment in the overall Film and Entertainment Industry has remained relatively constant, although the number of establishments grew by 35 percent between 2002 and 2007. Approximately one half of total state employment and total establishments are located in the Southeast region. Employment has been relatively steady in all of the Florida regions since 2002, with the exception of the East Central region, which seen a gain of nearly 1,000 jobs during the time period. See the figures below.



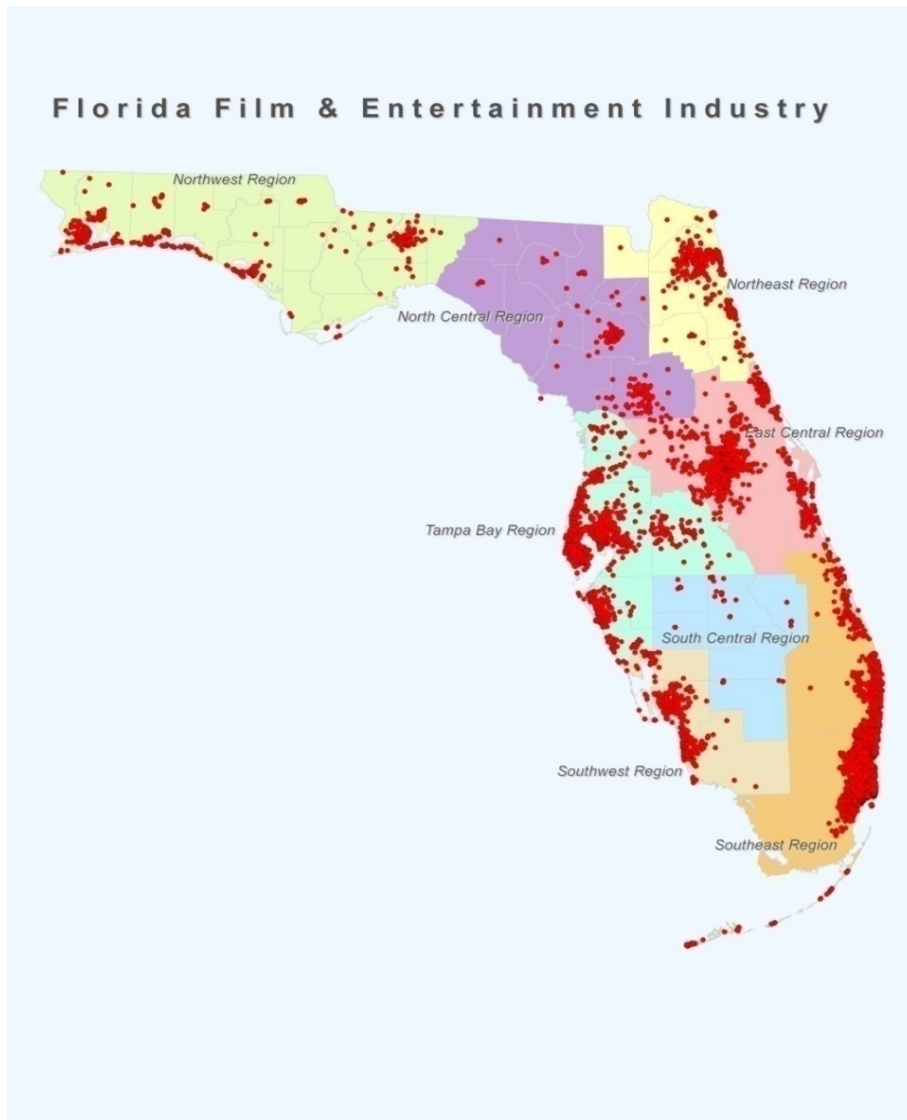
	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	2,686	2,800	3,306	3,645	3,882	45%	0.87	0.88
North Central	342	363	448	516	521	52%	0.57	0.60
Northeast	867	903	1,072	1,191	1,184	37%	0.78	0.83
Northwest	742	769	863	921	912	23%	0.65	0.66
South Central	44	37	38	39	42	-5%	0.33	0.28
Southwest	636	681	874	908	942	48%	0.82	0.75
Southeast	8,353	9,173	10,716	11,093	11,237	35%	1.07	1.01
Tampa Bay	3,022	3,184	3,706	3,823	3,877	28%	0.71	0.71

Establishment Assessment

In addition to producing feature films and filmed television programs, establishments in the Florida Film and Entertainment Industry produce made-for-television movies, music videos, digital media-based entertainment, and commercials. Establishments engaged primarily in operating motion picture theaters and exhibiting motion pictures or videos at film festivals are included in this industry, but have been excluded from this study. Other Florida establishments provide post-production services to the motion picture industry, such as editing, film and tape transfers, titling and subtitling, credits, closed captioning, computer-produced graphics, and animation and special effects.

The figure below shows the location and distribution of establishments within the Florida Film and Entertainment Industry by region. See figure below.

Florida Film and Entertainment Industry Clusters



Using both NAICS and SIC code definitions, establishment changes, both in number and in revenue, were examined in the Florida Film and Entertainment Industry between 2003 and 2007. Findings show that statewide, the number of industry establishments declined by 1.9 percent during that time period, while revenues for the remaining firms increased 46 percent. See tables below.

Statewide Industry Establishments by Business Type

STATEWIDE ESTABLISHMENTS NAICS CODE DESCRIPTION	2003	2004	Year 2005	2006	2007	2003-07 % change
ADVERTISING AGENCIES	2,114	2,064	2,076	2,111	2,093	-1.0%
AGENTS & MANAGERS FOR PUBLIC FIGURES	181	151	150	169	152	-16.0%
AUDIO & VIDEO MEDIA REPRODUCTION	129	126	125	112	102	-20.9%
CABLE & OTHER SUBSCRIPTION PROGRAMMING	395	361	381	397	426	7.8%
COMMERCIAL PHOTOGRAPHY	1,352	1,266	1,288	1,228	1,210	-10.5%
INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	1,858	1,820	1,884	1,991	2,020	8.7%
MOTION PICTURE & VIDEO DISTRIBUTION	30	29	24	23	23	-23.3%
MOTION PICTURE & VIDEO PRODUCTION	1,392	1,364	1,405	1,261	1,259	-9.6%
MUSICAL GROUPS & ARTISTS	278	251	250	243	235	-15.5%
MOTION PICTURE EQUIPMENT RENTAL	691	670	705	660	640	-7.4%
OTHER MOTION PICTURE & VIDEO INDUSTRIES	14	18	24	19	17	21.4%
OTHER SOUND RECORDING INDUSTRIES	299	279	289	281	268	-10.4%
SOUND RECORDING STUDIOS	596	559	560	536	496	-16.8%
TALENT PAYMENT SERVICES	319	331	372	406	422	32.3%
TELEPRODUCTION & POSTPRODUCTION SVCS	10	9	20	143	143	1330.0%
TELEVISION BROADCASTING	283	301	311	321	320	13.1%
WARDROBE RENTAL	463	435	431	396	378	-18.4%
Grand Total	10,404	10,034	10,295	10,297	10,204	-1.9%
Annual Percentage Change		-3.6%	2.6%	0.0%	-0.9%	

Statewide Industry Establishments Revenues by Business Type

STATEWIDE REVENUE NAICS CODE DESCRIPTION	2003	2004	Year 2005	2006	2007	2003-07 % change
ADVERTISING AGENCIES	\$ 4,677,490,000	\$ 4,732,653,000	\$ 4,539,162,000	\$ 5,723,537,000	\$ 6,078,570,000	30.0%
AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 115,361,000	\$ 109,052,000	\$ 112,082,000	\$ 271,671,000	\$ 239,538,000	107.6%
AUDIO & VIDEO MEDIA REPRODUCTION	\$ 199,557,000	\$ 178,668,000	\$ 158,748,000	\$ 204,708,000	\$ 196,175,000	-1.7%
CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 2,204,100,000	\$ 2,004,023,000	\$ 2,005,676,000	\$ 4,826,114,000	\$ 6,768,164,000	207.1%
COMMERCIAL PHOTOGRAPHY	\$ 425,888,000	\$ 395,103,000	\$ 363,718,000	\$ 639,348,000	\$ 441,971,000	3.8%
INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 1,178,793,000	\$ 1,231,180,000	\$ 1,443,351,000	\$ 2,079,817,000	\$ 1,790,881,000	51.9%
MOTION PICTURE & VIDEO DISTRIBUTION	\$ 173,936,000	\$ 149,975,000	\$ 91,784,000	\$ 44,555,000	\$ 56,749,000	-67.4%
MOTION PICTURE & VIDEO PRODUCTION	\$ 1,964,016,000	\$ 1,879,977,000	\$ 1,967,048,000	\$ 1,960,251,000	\$ 1,831,520,000	-6.7%
MUSICAL GROUPS & ARTISTS	\$ 233,332,000	\$ 298,465,000	\$ 308,445,000	\$ 308,672,000	\$ 314,375,000	34.7%
MOTION PICTURE EQUIPMENT RENTAL	\$ 3,101,488,000	\$ 4,787,868,000	\$ 4,575,273,000	\$ 3,565,324,000	\$ 3,255,536,000	5.0%
OTHER MOTION PICTURE & VIDEO INDUSTRIES	\$ 8,695,000	\$ 14,234,000	\$ 21,204,000	\$ 59,560,000	\$ 59,271,000	581.7%
OTHER SOUND RECORDING INDUSTRIES	\$ 195,336,000	\$ 217,164,000	\$ 202,211,000	\$ 172,043,000	\$ 192,136,000	-1.6%
SOUND RECORDING STUDIOS	\$ 701,154,000	\$ 707,337,000	\$ 745,753,000	\$ 1,254,728,000	\$ 1,262,773,000	80.1%
TALENT PAYMENT SERVICES	\$ 246,410,000	\$ 275,831,000	\$ 321,587,000	\$ 332,889,000	\$ 443,614,000	80.0%
TELEPRODUCTION & POSTPRODUCTION SVCS	\$ 2,629,000	\$ 2,803,000	\$ 7,502,000	\$ 44,859,000	\$ 39,229,000	1392.2%
TELEVISION BROADCASTING	\$ 4,330,864,000	\$ 4,479,282,000	\$ 4,766,894,000	\$ 5,781,516,000	\$ 5,913,167,000	36.5%
WARDROBE RENTAL	\$ 169,262,000	\$ 171,144,000	\$ 173,852,000	\$ 216,989,000	\$ 211,675,000	25.1%
Grand Total	\$ 19,759,049,000	\$ 21,463,615,000	\$ 21,630,438,000	\$ 27,269,592,000	\$ 28,883,669,000	46.2%
Percentage Change		8.6%	0.8%	26.1%	5.9%	

Estimated tax payments by Florida Film and Entertainment Industry establishments were nearly \$708 million in the 5-year period analyzed.

Regionally, the largest concentrations of firms are in the Southeast, East Central and Tampa Bay regions, although the Northeast region added the most new businesses between 2003 and 2007. In terms of

revenues, the Southeast generates the largest amounts, with 2007 revenues representing 41 percent of the state’s total revenues for the Florida Film and Entertainment Industry.

Looking at production and post-production firms specifically, while the number of production service companies declined statewide by 14 percent between 2003 and 2007, the number of post-production service companies increased 73 percent. As would be expected, revenues for production service companies declined nearly 15 percent while post-production service company revenues more than doubled, growing by 118 percent. Regionally, from 2003 to 2007, most Florida regions saw flat or declining revenues from production and post-production service companies, with some regions declining sharply. However, revenues grew during this time period by 45 percent in the Southwest and 28 percent in the Southeast. It’s estimated that, statewide, Florida production service companies spent over \$568 million from 2003 to 2007 on marketing and advertising.

Workforce

Of major importance in maintaining and further developing the Florida Film and Entertainment Industry is the quality and quantity of the state’s industry workforce. Between 2003 and 2007, the Florida Film and Entertainment Industry workforce grew nearly 14 percent, with most component industries seeing some growth in employment over the period. See table below.

Florida Film and Entertainment Industry Employment 2003-2007

NAICS Code	Description	2003 Jobs	2004 Jobs	2005 Jobs	2006 Jobs	2007 Jobs	% change 03-07
512110	Motion picture and video production	5,285	4,936	5,525	5,308	5,507	4.2%
512120	Motion picture and video distribution	213	171	170	182	215	0.9%
512191	Teleproduction and postproduction services	435	395	373	417	448	3.0%
512199	Other motion picture and video industries	300	85	98	76	77	-74.3%
512210	Record production	101	93	116	177	186	84.2%
512240	Sound recording studios	775	671	632	686	663	-14.5%
512290	Other sound recording industries	415	292	256	281	294	-29.2%
515120	Television broadcasting	9,336	9,670	9,534	9,293	9,536	2.1%
515210	Cable and other subscription programming	5,234	5,607	5,751	5,931	4,383	-16.3%
541810	Advertising agencies	13,157	16,530	16,295	16,108	16,369	24.4%
541922	Commercial photography	1,051	1,000	932	1,201	1,279	21.7%
711130	Musical groups and artists	2,448	2,475	2,540	2,855	2,850	16.4%
711510	Independent artists, writers, and performers	46,801	48,394	50,511	52,268	55,470	18.5%
	Total	85,552	90,320	92,735	94,784	97,276	13.7%

Source: EMSI Complete Employment – Spring 2008 Release v. 2

The Florida Film and Entertainment Industry employs workers in every major occupational group. These include the above-the-line (expenditures committed prior to production) talent positions such as writers, starring actors, and directors, as well as below-the-line production and post-production positions such as cast, director of photography, assistant directors, and other crew members. For 2007, the average annual wage for the Film and Entertainment Industry as defined was approximately \$57,700 in Florida. Employment in the core professional and technical occupations grew, for the most part, in Florida between 2002 and 2007, with declines being seen in camera operators, film and video editors, audio and video equipment technicians, and sound engineers. Because of the prevalence of unions

within the industry, wages for the differing occupations vary tremendously, although the differential varies between the different occupations, as wages broken out in percentiles indicate. See table below.

Florida Film and Entertainment Industry Occupations and Wages

Description	2007 Jobs	2007 Median	2007 Avg	2007 Pct 10	2007 Pct 25	2007 Pct 75	2007 Pct 90
		Hourly Earnings	Hourly Earnings	Hourly Earnings	Hourly Earnings	Hourly Earnings	Hourly Earnings
Art directors	5,958	\$12.78	\$15.68	\$8.50	\$9.39	\$19.39	\$29.90
Multi-media artists and animators	5,823	\$11.63	\$14.40	\$7.93	\$8.66	\$17.70	\$26.98
Artists and related workers, all other	5,451	\$10.44	\$13.18	\$7.05	\$7.65	\$17.03	\$25.79
Graphic designers	14,114	\$17.62	\$19.36	\$10.94	\$13.73	\$23.13	\$30.30
Set and exhibit designers	2,196	\$19.39	\$23.02	\$8.30	\$12.27	\$29.75	\$44.26
Actors	3,615	\$9.80	\$14.30	\$6.95	\$8.25	\$15.41	\$29.04
Producers and directors	5,793	\$20.75	\$25.47	\$10.30	\$14.00	\$32.43	\$45.85
Dancers	1,399	\$11.06	\$12.23	\$7.12	\$8.65	\$16.07	\$24.26
Choreographers	508	\$10.32	\$13.32	\$7.20	\$8.02	\$16.05	\$24.62
Music directors and composers	8,739	\$8.00	\$10.29	\$7.05	\$7.17	\$11.57	\$20.86
Musicians and singers	12,489	\$8.90	\$11.48	\$6.90	\$7.51	\$14.20	\$22.22
Public relations specialists	22,540	\$21.22	\$23.84	\$13.07	\$16.16	\$28.35	\$38.82
Editors	7,342	\$20.67	\$23.31	\$10.94	\$14.50	\$28.90	\$40.06
Writers and authors	19,639	\$11.03	\$13.90	\$7.22	\$7.93	\$17.20	\$26.23
Audio and video equipment technicians	2,370	\$16.97	\$18.47	\$10.15	\$13.10	\$22.24	\$30.56
Broadcast technicians	2,944	\$16.97	\$18.31	\$9.21	\$12.31	\$22.83	\$30.42
Sound engineering technicians	1,135	\$15.88	\$17.92	\$7.98	\$11.66	\$22.73	\$29.54
Photographers	39,692	\$14.95	\$19.35	\$7.46	\$9.41	\$24.22	\$37.25
Camera operators, television, video, and motion picture	1,773	\$17.75	\$19.41	\$9.21	\$12.35	\$24.55	\$33.23
Film and video editors	1,229	\$17.03	\$20.04	\$9.71	\$12.62	\$25.35	\$35.28
Advertising sales agents	13,160	\$21.59	\$27.15	\$11.00	\$15.03	\$33.58	\$51.74
	177,909	\$15.37	\$18.62	\$8.99	\$11.06	\$22.87	\$33.83

Source: EMSI Complete Employment - Spring 2008 Release v. 2
PCT = Percentile. The percentile is the value of the variable below which a certain percent of observations fall.
For example, for art directors, 10 percent have hourly earnings of up to \$8.50; 25 percent have hourly earnings of up to \$9.39, etc.

To gain further insight into the opinions of the Florida Film and Entertainment Industry workforce, a telephone-based survey was conducted from September 11, 2008 through September 17, 2008. This survey-based approach permitted analysis of Florida’s Film and Entertainment Industry economy from the perspective of those who work daily in the industry. With respect to education, the overall level of education among Florida Film and Entertainment Industry employees is high. Further, approximately one-third of the respondents are seeking additional training in the industry and many hope to complete that additional training in the state of Florida. Despite their enthusiastic desire to advance themselves within the industry, there is an overall perception among respondents that Florida does a poor job – relative to other states – in maintaining and promoting a sustained and vibrant film economy.

Respondents consistently highlighted the efforts of non-traditional film and entertainment states (such as Louisiana, Georgia and New Mexico and more traditional film and entertainment states (such as New York and California) as far exceeding the efforts of Florida in regards to retention and promotion of film and entertainment companies.

An overwhelming number of respondents enthusiastically support tax breaks and other financial incentives for Florida-based companies and for companies that are willing to relocate to Florida. One respondent perhaps summed it up best when he said that the state “needs to get some incentives going to keep the production companies in the state....I would like for Florida to become Hollywood East.”

Digital Media

Digital Media, as an industry, is enormously complex and varied, comprising a disparate range of services and products across a broad range of applications, platforms, tools, and industry sectors and embracing education, information, entertainment, and consumer- and business-oriented content. In Florida, a recent survey by Digital Media Alliance Florida identified about 25,000 companies in Florida's digital media industry. Professionals in this sector include multi-media artists and animators, graphic designers, videogame and web developers, art directors, content authors, producers, audio engineers, motion graphics and video editors, photographers, and programmers. The survey also found that the Digital Media Industry payroll statewide exceeds \$1 billion and that digital media professionals in Florida earn on average \$59,766 a year – compared to the \$38,498 statewide annual average salary for all industries. Using Florida occupation by industry information, the number of jobs in identifiable digital media occupations was entered into an input-output model in order to estimate the economic impact of the Digital Media Industry within the Florida Film and Entertainment Industry. Using IMPLAN modeling software, it's estimated that the digital media presence within the broader Florida Film and Entertainment Industry represents over \$3.6 billion in output and over \$1.5 billion in value-added and generates over 15,314 direct jobs and 28,750 total jobs throughout the entire Florida economy. Digital media occupations are expected to grow overall by 11 percent in the next ten years, with multi-media artists and animators growing at the fastest rate. See table below.

Employment Forecast for Film and Entertainment Digital Media Occupations

Description	2008 Jobs	2018 Jobs	Florida Change	Florida % Change	National % Change
Computer specialists, all other	6,338	7,281	943	15%	16%
Art directors	6,490	7,964	1,474	23%	19%
Multi-media artists and animators	6,089	7,765	1,676	28%	25%
Graphic designers	15,273	17,597	2,324	15%	14%
Sound engineering technicians	1,122	1,277	155	14%	12%
Photographers	39,861	41,756	1,895	5%	3%
Film and video editors	1,209	1,413	204	17%	18%
Totals	76,382	85,053	8,671	11%	11%

Source: EMSI Complete Employment - Fall 2008

Industry Subsectors

The broader Florida Film and Entertainment Industry encompasses several subsectors and industries. This portion of our analysis examined some of these subsectors in order to evaluate their magnitude within the state industry. These consist of Hispanic and minority productions, commercials and music videos, independent filmmakers, international non-Hispanic productions, faith-based productions, location filming, post-production facilities and classic cell animation.

Hispanic and Minority Production

Americans of Hispanic origin form the single largest ancestral minority grouping in the United States and, according to the LA Times, spend billions of dollars annually on entertainment and represent the

fastest-growing segment of the movie-going audience. In order to better understand the challenges and opportunities unique to Hispanic and minority production and service companies located in Florida, we conducted a series of in-depth interviews with 16 companies self-identifying as Hispanic or minority owned around the state. Approximately 82 percent of these firms reported a slow and steady growth in employment since 2002. None of the firms indicated a fast pace of growth in the past 6 years and many noted that they had taken major hits in the past fiscal year as the economy took a downward turn. Approximately 63 percent expect slow growth over the coming years. Eighty-six percent of the respondents thought tax incentives would boost the industry in Florida. Approximately 71 percent of the respondents thought start-up assistance would provide a boost and 71 percent supported a program to provide subsidies for Florida colleges and universities to increase the number of training programs. A majority of respondents (64 percent) also supported financial assistance for those seeking training in the industry.

Commercial and Music Video Production

According to the Florida Film Production Guide 2007-08, there are currently 385 companies in Florida that produce commercials and 178 companies in Florida that produce music videos, with some overlapping between companies. To further our understanding of the companies that produce commercial and music videos in Florida, we conducted 10 in-depth interviews with companies around the state of Florida who self-identified as producers of commercials and music videos. These companies spent an average of \$650,000 in the state over the previous year. Included in this figure were salaries, benefits, production costs, and travel expenses. The 10 companies employed an average of 24 employees with 50 percent reporting that this number had decreased moderately or substantially since 2002/2003. Some of the production work occurred in south and central Florida including Orlando and Miami; however, the largest company interviewed indicated that roughly half of their production work occurred out of Florida in New York. Others companies reported that a sizable amount of production work took place in Georgia. With respect to the Florida portion of these companies' business, only one company reported a moderate increase in business that was Florida related over the past 6 years. An overwhelming 90 percent of these companies forecast a moderate or drastic decrease in production in the future for commercials and music videos with budgets greater than \$100,000.

Independent Film Production

Independent filmmakers have been traditionally defined as those that work outside of the established Hollywood studio system. Independent filmmakers represent a vast, diverse market. Ranging from feature films, documentaries, and short films, independent film has made it to the forefront of the entertainment industry. While higher budget independent films like *Juno* and *Little Miss Sunshine* have brought independent filmmaking to mainstream America, the rapid diffusion of affordable technology has made lower budget independent films (\leq \$1 million) extremely salient and has led to an exponential increase in the number of aspiring filmmakers. Even though most of the independent films never make it to theatrical release, their production and distribution represent a large opportunity for revenues.

We conducted 8 in-depth interviews of independent producers in the state of Florida. They reported that they had, on average, completed 340 productions since 2002. Their clients ranged from corporations to government agencies desiring short films and small productions. Included also were TV shows with various entertainment companies. Two key concerns for these filmmakers center on the lack of funding for, and lack of public knowledge of, independent films. Respondents also indicated that a lack of tax incentives and problems with distribution were also key issues faced by independents. However, none agreed with the statement that there isn't a large enough well-trained workforce. With respect to potential solutions to these issues, the respondents identified investments and incentives as key. These companies feel that either the state must invest more directly in the industry or the state must make it easier for private investors to invest in independent productions in the state.

International Non-Hispanic Production

Since 2001, there have been 92 non-Hispanic international productions shot in Florida. While the number climbed sharply between 2003 and 2004, it has remained relatively stable since then and does not presently represent a large component of the industry as a whole. One opportunity that has the potential for growth for Florida is Indian film production. India has the world's largest film industry, of which Mumbai-based Bollywood, which produces Hindi films, is the biggest part. India releases over 1,000 movies per year, or about twice Hollywood's production.

One strategy for Florida to use in tapping into the Indian industry is to attract location shooting. For example, the recent Indian production of *Dostana*, which centers around three young Indian professionals living in Miami, brought a local production budget of about \$2 million – equivalent to an independent film or a major commercial - to the Miami area.

The biggest impact, however, for Florida in attracting location shooting from India may be on tourism. Known as the "Bollywood effect," Indian movies set on location have been credited with spikes in vacationers from India, one of the world's fastest-growing economies. Switzerland established itself as Indian vacationers' No. 1 European destination after Bollywood directors used its Alps as a substitute for scenes set in the dangerous Kashmir region and Indian tourism to New Zealand surged 800 percent in the four years after the Bollywood hit *Say You Love Me* was filmed in Queenstown, according to a report by the British film agency.

Faith Based Production

According to Grace Hill Media, the producers of *Thou Shalt Laugh* and the leading marketing firm for religious consumers, "the Christian entertainment industry has boomed into a more than a \$3 billion a year industry." Christian-themed radio and books each reportedly generate more than \$1 billion annually. In recent years, seven major studios have opened divisions that target faith-based audiences. Movies with redemptive themes have consistently earned more revenue than any other type of film, averaging \$39 million in 2006, up from \$5 million in 1993, according to Movieguide's recent annual report to the entertainment industry. The report found nearly 50 films were released in 2006 with positive Judeo-Christian content. Currently, there is one film production company located within Florida that identifies itself as specifically a faith-based organization. However, faith-based productions are

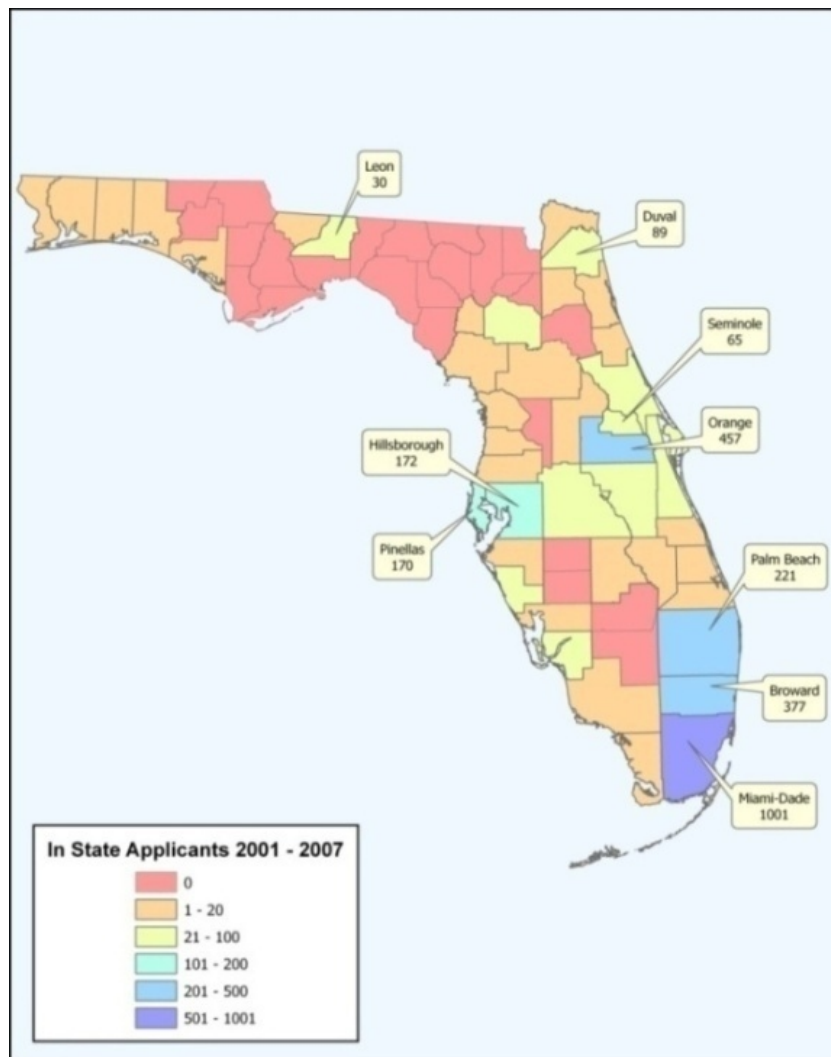
becoming a considerable force in the entertainment industry. The growth of such production companies represents a potential opportunity for the state.

Location Filming

Today, the studio is just another location and locations themselves have become a totality of place – not just the scenery to be filmed, but an agglomeration of what is available to the filmmaker in terms of shooting environment and availability of production and post-production services.

Using Florida sales and use tax exemption incentive data, production activity occurring in Florida since 2001 was mapped at the county level. Based on data used in awarding state sales tax exemptions for qualified companies, film productions in Florida were found to be scattered throughout the state between 2001 and 2007, with Miami-Dade garnering the largest number of productions.

Florida Tax Exemption Applicants by County



There are 54 local film liaisons within the state of Florida that provide production assistance to the film and entertainment industry. Data collected from these offices reflect a declining number of productions and production days, although employment on these productions has increased since 2002.

Economic Impact of Motion Picture and Video Production

Employment and spending information for the Motion Picture and Video Production Industry (NAICS 512110) within Florida was entered into an input-output model in order to estimate the economic impact of the industry within the broader defined Florida Film and Entertainment Industry. Using IMPLAN modeling software, estimates of overall economic impact for these productions were calculated for calendar years 2002 through 2007. See the table below.

Estimated Economic Impact of Movie and Video Production in Florida

Year	Employment	Output	Value Added
2002	64,546	\$ 8,119,965,471	\$ 2,993,988,085
2003	42,576	\$ 5,601,977,913	\$ 2,028,934,994
2004	35,688	\$ 4,768,067,327	\$ 1,717,226,181
2005	52,254	\$ 6,579,472,745	\$ 2,426,104,169
2006	50,340	\$ 6,315,477,221	\$ 2,332,247,475
2007	26,257	\$ 3,423,802,351	\$ 1,247,357,571

All Output and Value Added numbers are in 2008 dollars
Source: IMPLAN

The data reflect a sharp decline in Florida productions between 2006 and 2007, resulting in lower economic impacts and lower employment generation throughout the Florida economy.

Post Production

Because of technological changes in film production and post-production techniques, filmmakers now have a much larger pool of potential post-production service providers. They can continue to use the facilities that are geographically proximate to their production site or they look for smaller facilities in new markets. This has allowed new production markets to build a technical infrastructure without relying solely on local production. We contacted 63 post-production companies who are currently doing the post-production work on 10 films currently in post-production in Florida. Of these, 2 were shot in Fiscal Year 04-05 and 4 were shot in Fiscal Year 06-07 in the state of Florida. Another 3 films were shot out of state in Fiscal Year 06-07 and one was shot out of state in Fiscal Year 05-06. One of the companies has plans to complete post-production work on an additional film that was shot in 06-07. All of the non-Florida productions were shot in Louisiana and Georgia, with some work done in Canada.

Classic Cell Animation

Currently in Florida, there are an estimated 39 companies that deal in 2D or classic cell animation. All are located in the Southeast, South Central, and Tampa Bay regions of the state. Since the closure of

Disney’s classic cell studio in Orlando, these remaining companies are small businesses that typically employ fewer than 10 employees. According to the 2008 wage survey from the Animation Guild, union wages for 2D animators range from \$1,490 to \$3,000 per 40-hour work week.

Florida Film and Entertainment Industry Economic Impact

In 2002, Florida firms within the overall Film and Entertainment Industry generated over \$4.7 billion in revenue and paid over \$1.2 billion in wages. By 2007, the major component industries of motion pictures, television, commercials and music videos, and digital media saw revenues exceeding \$8.5 billion, or 5.2 percent of US same industry wide revenues.

The estimated economic impact of the Florida Film and Entertainment Industry grew from nearly \$27 billion in 2003 to \$29.2 billion in 2007. The industry is currently responsible for over 207,000 jobs in the state, a 3.7 percent increase from 2003, and generates nearly half a billion dollars in tax revenues annually, up an estimated 5.3 percent during the same time period. The 2007 Gross Regional Product (GRP) generated by the industry represents 2.4 percent of the total state GRP. See the table below.

Estimated Economic Impact of the Florida Film Industry in 2003 and 2007			
	2003	2007	% Change 03-07
Total employment	200,400	207,800	3.7%
Total GRP (Billions 2008\$)	15.83	17.88	13.0%
Personal Income (Billions \$)	6.72	8.5	26.5%
Output (Billions 2008\$)	26.89	29.29	8.9%
Value-Added (Billions 2008\$)	15.57	17.73	13.9%
Taxes	2003	2007	
Intergovernmental Revenue	\$ 49,612,000	\$ 43,380,000	-12.6%
General Sales Tax	\$ 262,800,000	\$ 258,300,000	-1.7%
Selective Sales Tax	\$ 85,203,000	\$ 90,750,000	6.5%
Corporate Income Tax	\$ 35,590,000	\$ 45,090,000	26.7%
Other Tax	\$ 39,070,000	\$ 60,020,000	53.6%
Total	\$ 472,275,000	\$ 497,540,000	5.3%

Source: REMI Policy Insight Versions 7.0 and 9.5

While box office revenues, media consumption, and Florida employment are expected to continue to grow, one area of focus for additional potential growth in the Film and Entertainment Industry sectors is the local supply chain. While it is not possible or cost-effective to produce all of the inputs (goods and services) that an industry needs locally, examining how much a selected industry or entire cluster purchases from various other industries (its “requirements”), along with how much of that amount is satisfied by industries inside the region and how much must be satisfied by industries outside the region, can reveal the industry’s or cluster’s major dependences on outside imports. Developing the

industries that supply the Film and Entertainment Industry in Florida adds to the overall growth of the industry.

The Florida Film and Entertainment Industry is forecasted to grow faster than other targeted industry clusters within the state of Florida. With a projected employment growth rate of 20 percent, it is expected to grow faster than the Biomedical/Biotechnical cluster (19%) and the Defense and Security cluster (18%).

A multiplier is a single number that summarizes the total economic benefits resulting from a change in the local economy. Using industry multipliers from the IMPLAN modeling system, this overall industry multiplier for the Film and Entertainment Industry is calculated to be 1.95. **Thus for every \$1 spent on a production within the State of Florida, the state sees an additional ninety-five cents in impact.**

The impact could be larger if more films and other types of productions were attracted to the state. In addition, the impact will grow if Florida continues to develop its film and entertainment cluster with larger pools of skilled labor, suppliers, and production capabilities. A film production and post-production cluster would likely attract more films and lead to a significant, lasting, long-term economic impact on the Florida economy.

Growing the Indigenous Industry

To evaluate where Florida companies fit into the national Film and Entertainment Industry, industry professionals in Film and Entertainment Industry companies not currently located within Florida were questioned in order to gain additional insight into current perceptions and opinions of Florida as a place to do business. Companies questioned included international production companies, motion picture studios, finance companies, distribution companies (major and independent), Hispanic production companies, visual effects houses and game developers. Taken together, this anecdotal evidence points to Florida as a being seen as a poor place for industry business. Suggestions for improvement included better, more consistent incentives; increased infrastructure; an improved business climate and better marketing of what the state has to offer.

SWOT Analysis

SWOT analysis is a tool for auditing an organization or industry and its environment. It is the first stage of planning and helps stakeholders to focus on key issues. SWOT stands for strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are internal factors. Opportunities and threats are external factors.

What follows is a SWOT analysis for Florida both as a filming location and a business location for the Film and Entertainment Industry.

Strengths

Uniqueness of place – Florida offers a wide variety of filming locations that are difficult to duplicate in the United States and several, such as Miami, that are internationally recognizable. As Matt Nix,

Executive Producer, Writer, and Creator of the USA Network original series *Burn Notice* put it in a July 31, 2008 interview “. . . we do have a lot of opportunity to explore because we are outside so much on location, it’s very easy to say that Los Angeles can double or Vancouver can double for anyplace, and it’s true that anyplace can have the inside of a police station because you can build it or you can find a few palm trees in any location or bring them, but one of the nice things about working in Miami is that it’s a big city, it’s a distinctive city, and they’re really are a lot of distinctive things about it, and if you’re not here you can’t get all the fun deco architecture.”

Industry infrastructure – much of the needed infrastructure is in place in Florida in terms of crew base, establishments that support all phases of production, desirable locations, film festivals, post-secondary educational programs, and film offices.

Existing production centers – Florida already has existing production centers in North, South and Central Florida. According to the Film Florida Production Guide and InfoUSA, Florida has the following infrastructure in place:

Backlots	8
Foley Stages	7
Insert Studios	59
Virtual Studios	8
Warehouse Space/Raw Space	15
Photo Studios	78
Recording Studios	76
Sound Stages	57
Television Studios	44
Motion Picture Film Labs	2
Special Effects Companies	5

Government support – there is an established film office and film liaison infrastructure within Florida. Florida’s film office is housed in the Governor’s office and there are 54 local film liaisons located throughout the State. Florida is also the only state with a full time Los Angeles film liaison.

Cost advantage – shrinking, but Florida still has a cost advantage over larger production centers such as New York and Los Angeles.

Weather – Florida has the climate for year around shooting and is known for the quality of its light

Longevity – Florida has a long history within the Film and Entertainment Industry in part because it provides a strong tourism infrastructure that provides activities for industry participants when filming or residing here.

Weaknesses

Inconsistent production incentives – Florida’s inability to fully fund its incentives programs makes it difficult for production companies to factor these into long range plans. Florida’s current incentives structure relies on annual appropriations and recent budget issues have severely impacted the amount of incentive money available.

Operational effectiveness of infrastructure – Florida has a legacy infrastructure that may not be meeting current industry demands. The ability to upgrade infrastructure is limited by low production activity cause partially as a result of inconsistent incentives. Lack of production restricts the inflow of needed capital as well as limiting on-the-job training opportunities for Florida’s workforce.

Loss of reputation and “brand” name – most who were questioned in the film industry were not impressed with Florida as either a location for filming or as a state with a vibrant film and entertainment industry. Florida is seen as too removed from either California or New York to be a “player”. This viewpoint is particularly interesting given Louisiana’s rise within the film industry.

Marketing - professionals were unaware of existing incentives or felt incentives were only for large productions. Florida is seen as lacking a good film infrastructure – again interesting given the size of the state’s production centers.

Hurricanes – recent severe seasons have brought this issue to the forefront

Geography – insurance costs for productions increase for areas within 100 miles of the ocean. There is no place in Florida that is over 100 miles from water.

Labor Rates – the current structuring of labor rates by unions, such as IATSE, results in wages rates some \$5.25 to \$6.00 per hour higher on productions taking place in Florida as compared to neighboring and competing states. There is also an existing perception that unions are difficult to deal with in Florida.

Opportunities

Low entry barriers – increased usage of digital technology also translates into decreased start-up costs for businesses within the industry.

Learn from others – many states and their indigenous businesses are wrestling with the same problems as Florida. This presents an opportunity to observe what works (and what doesn’t) for them and see if it is applicable in Florida.

Niche markets - Niche marketing is how businesses maximize their profits and provide product to specific interest groups in all sectors of the economy. Florida has an opportunity to examine its competitive advantage in providing content to niche markets that currently exist and will exist in the

future within the Film and Entertainment Industry. One market for consideration is the international growth of the Indian film industry. As “Bollywood” expands, so do opportunities for location shooting.

Digital - Digital technologies represent an industry wide opportunity, and Florida businesses have the opportunity to, as mentioned in the 2006 study, be the “grandfather” in the industry. Florida is already taking steps in this area by establishing digital media as one of its Employ Florida Banner Center industries. Florida is also home to a strong defense and simulation industry, creating opportunities for synergy where these industries overlap. Currently, Electronic Arts, the largest video game developer, makes its home in the high tech corridor of Central Florida. With the projected growth in digital technology within the industry, Florida has the opportunity to investigate incentives tailored toward attracting and retaining these businesses.

Spanish language workforce— Florida is home, according to the 2000 Census, of the third largest Spanish speaking population in the United States. This presents an obvious source of workforce for the production of products tailored to the Spanish language market.

Threats

Other states – Many other states have discovered the desirability of having a strong film industry and attracting location shooting. For example, New Mexico offers a loan, with participation in lieu of interest, for up to \$15 million (which can represent 100 percent of the budget) for qualifying projects. Michigan offers up to a 42 percent refundable tax credit. Additionally, because other states have less crew infrastructure, Florida based crew can go to these states and work at a higher level/higher paying job than they could get than if they worked on a Florida production.

Other countries – Many countries also offer production incentives and have similar types of locations as Florida.

Mobile industry –If there were an inherent advantage in having the motion picture production industry in a fixed location; it would never have left Hollywood. The industry and its workforce are mobile, and digital technologies are only increasing this mobility and eroding Florida’s workforce. Conversely, the mobility of the workforce also provides an opportunity for Florida to attract labor.

Special Threats

Film and music piracy presents a special threat to Florida’s Film and Entertainment Industry. The piracy of copyright protected digital goods is a large and growing problem in the music, computer software, videogame, and film industries. Florida households spend approximately \$2.9 billion dollars annually on movie admissions, purchases of videos, music CDs and DVDs, and rentals of videos and DVDs. Of this spending, it is estimated that Florida industry losses to piracy annually exceeds \$211 million. This results in an estimated annual economic cost to Floridians of over \$334 million in output, \$126.8 million in

value-added and some 1,524 jobs. Of these, 618 jobs would be in the motion picture industry, record producing and video rental business; the rest would be in other industries.

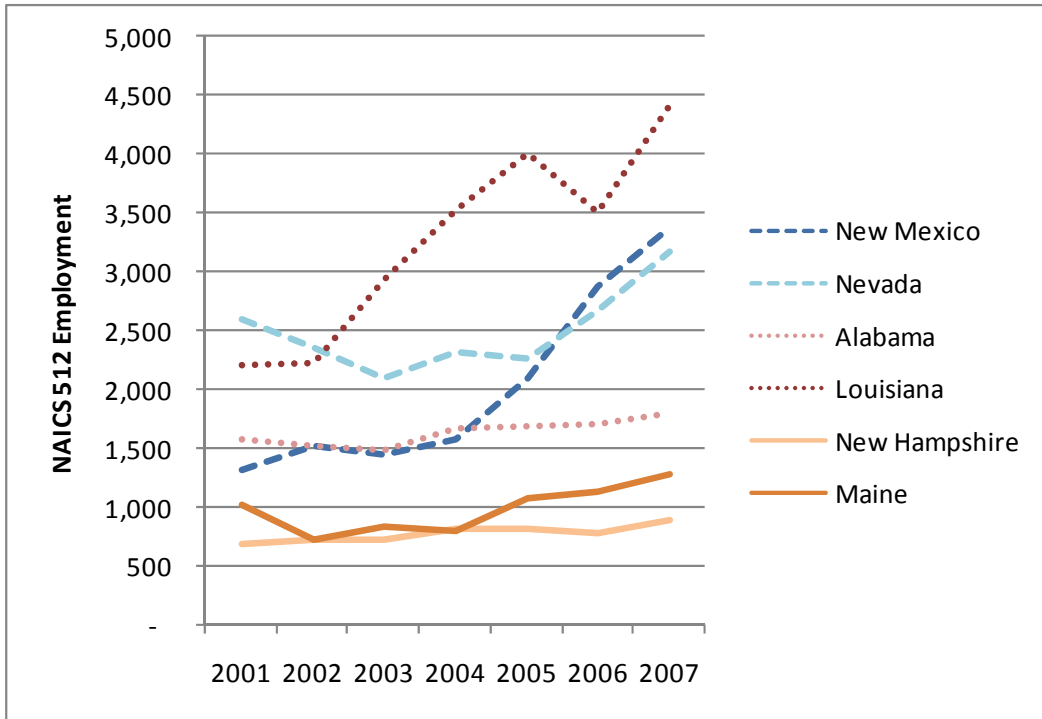
Production incentives offered by other states also represents a threat to Florida's industry. Film production is a high-wage, labor-intensive business, employing skilled workers and large numbers of local self-employed technicians, caterers, actors, laborers, and technical crews. It is heavily dependent on the hospitality industry to maximize the quality of its temporary residence and brings a "home-base cost-of-living" requirement into the expected quality of life on location. Of key importance is the fact that in addition to immediately enhancing the local business environment, production brought in from out of state on a regular basis can serve to accelerate training in a local economy to provide future technical and skilled workers in this sector. According to a 2005 study comparing film production incentives, the challenge for state and local film production promotion efforts is to develop strategies that compete with "best practices" yet have policies that grow the industry while minimizing "pirating" from other areas and avoiding "giving away the store" in financial and tax incentives.

Gauging the net impact of film production incentives on a state's total employment is difficult. Recently, Ernst and Young completed an analysis of the economic and fiscal impact of the New Mexico Film Production Tax Credit. In it the economic and fiscal impact examination of the state's tax credit looked at three categories of spending as the economic activity generated by the tax credit. These categories were 1) total production expenditures, including those qualifying for the credit and those not qualifying; 2) capital expenditures within the state attributable to the industry; and 3) tourism spending attributable to visitors coming to the state because they had seen it in a film. Taken together, these produced a \$1.50 return on every dollar invested in the tax credit.

While sufficient data does not exist to duplicate the New Mexico study for the Florida Film and Entertainment Industry, Florida's total production numbers (the only numbers available comparable to what were used in the New Mexico study) were entered into IMPLAN model. Using the total production expenses reported in the 2007 sales tax report of \$816,462,452 for both in state and out of state companies, tax revenues (before consideration of the sales tax rebate) of \$29.6 million were generated by this spending. This represents a \$1.60 return for every incentive dollar spent return. In other words, the state receives back its dollar plus an additional 60 cents.

Another way to roughly look at the impact incentives have had is to compare the employment in the Motion Picture and Sound Recording industries in states with similarly sized population and geographic location, where one has a film production incentive in place and one does not. The figure below shows employment for three pairs of states from 2001-2007. These pairs consist of New Mexico and Nevada, Louisiana and Alabama, and Maine and New Hampshire. In each case the first state listed has a film production incentive program in place, the second has no program. See the chart below.

Incentive Employment Comparison



Source: Bureau of Labor Statistics QCEW Program. Note: Alabama’s film production incentive program lapsed in 2006.

In each case, the state with a film production incentive in place was able to grow its resident film industry infrastructure more rapidly than those states without an incentive. While these observations are far from conclusive, they suggest that film production incentives have a positive impact on employment growth.

This is further reinforced when job growth in the Motion Picture and Sound Recording industries (NAICS 512) between 2006 and 2007 is apportioned by state to create an “Expected” number of new jobs and then compared to the “Actual” number of new jobs within the state. See the table below.

Expected versus Actual Employment Growth Comparison 2006 to 2007

	Expected Jobs	Actual Jobs
California	2,076	1,237
New York	632	(197)
Florida	195	368
Georgia	89	(151)
Virginia	68	354
Massachusetts	63	510
Maryland	62	322
North Carolina	62	111
Louisiana	48	908
New Mexico	39	509
Nevada	37	489
Connecticut	30	830
South Carolina	25	283
Pennsylvania	95	225
Mississippi	14	(10)
Rhode Island	13	(386)

To further assess the competitiveness of Florida's incentives with those of selected competing states and Canada, the budget of a medium budget feature film (\$20 million) developed and financed by a California studio, was translated to conditions in Connecticut, Florida, Georgia, Louisiana, Mississippi, New Mexico, New York, North Carolina and South Carolina, as well as Toronto, Canada. Using California as 100 percent, it was found that by applying each areas incentives packages and differing wage rates, regions ranged from a low of 68 percent of California costs in Toronto to 94 percent of California cost in New York. Florida came in at 88 percent of the California cost. See the table below.

State Film Production Cost Comparison

State	% of California cost	Budget
California	100%	\$ 20,000,000
New York	94%	\$ 18,838,462
Florida	88%	\$ 17,663,378
Connecticut	82%	\$ 16,414,201
North Carolina	80%	\$ 15,955,495
New Mexico	76%	\$ 15,159,055
South Carolina	74%	\$ 14,706,309
Louisiana	73%	\$ 14,699,055
Mississippi	72%	\$ 14,351,319
Georgia	69%	\$ 13,794,016
Toronto, CA	68%	\$ 13,691,642

8 week shoot

\$	6,000,000	ABTL
\$	12,000,000	BTL (includes \$1M in purchases)
\$	2,000,000	Post-Production

Assumes all qualifications for expenditures have been met.

Doesn't include discount programs

Doesn't include bed tax exemptions

Assumes Canadian shell company used to earn tax credit

Assumes requirements for bonus incentives met

Assumes incentive programs fully funded.

Strategy

There have been previous studies undertaken of the Florida Film and Entertainment Industry, and these provide a useful context in determining strategies for the industry moving forward. In a 1987 publication called *Lights! Camera! Florida! – Ninety Years of Moviemaking and Television Production in the Sunshine State*, the study author Dr. Richard Alan Nelson listed eight factors that had made a stable, broadly based film and video industry possible in Florida. These were:

1. Long term growth in demand for new film and video products by industrial as well as consumer-oriented clients
2. The demise of the old studio system and the rise of the independent producer
3. The convenience afforded by rented, mobile technologies and improved film stocks, resulting in more location shooting – particularly for television commercials
4. Cheaper production costs (averaging 10-40% below California) because of right to work laws and union conditions
5. Locally experienced crew, extras and support personnel ranging from labs to caterers

6. Successful on location experiences resulting in positive word of mouth from independent producers working in the South
7. Aggressive marketing by the state and city film-television commissions, providing valuable assistance from red tape cutting to location scouting services
8. Increased local financing

In 2006, the Tourism Committee of the Florida House of Representatives State Infrastructure Council authored a report entitled *Florida's Entertainment Industry Infrastructure: Are We Growing the Indigenous Industry as well as Supporting Production?* This report looked both at the state of the industry within Florida as well as the operations of the Governor's Office on Film and Entertainment (OFE). The study put forward the following conclusions:

- Other states are aggressively pursuing various aspects of the entertainment industry through a variety of incentives. These incentives have and will continue to impact the amount of production that the state is able to bring in and the amount we are able to keep in the state.
- Some of the states with aggressive incentives, such as Louisiana, do not have the established infrastructure that Florida has. These states, however, are also aggressively pursuing building of an infrastructure, buildings and people, to support the industry base. Erosion of a well-known, marketable draw to a state for business needs to be avoided.
- The current financial incentive of the state, although extremely successful, should be reviewed and modified to make it more competitive while retaining the integrity of the incentive to benefit the state and our industry and crew. Issues raised included threshold level of the incentive acting as a disincentive; adequacy of the incentive regarding commercial production, television pilots and series, and independent productions; perception of uncertainty of funding acting as a disincentive to doing business in the state; and ineffectiveness of the incentive for digital media effects and business relocation.
- The use of a transferable corporate tax credit versus annual appropriation should be reviewed to determine if this will ameliorate concerns regarding the state's incentive and will bring more to the state on a long-term basis.
- There is a need for a strategic plan for growth of the entertainment industry sector in the state which includes specific steps for growing our indigenous industry. This should be a roadmap developed by OFE in conjunction with EFI, Workforce Florida and appropriate university, college and community college programs. Local film commissions and persons in the industry should be involved as well.
- The variety of incentives that encourage independent production and indigenous industry growth that are being used in other states should be reviewed to determine if these could help benefit Florida.
- Florida is the only state that statutorily specifically excludes electronic gaming from its incentives. Florida should examine how this industry fits into its plans. [This recommendation has since been addressed]
- The sales and use tax exemption does not include raw stock film and videotapes. This should be reviewed.

- The use of film festivals as distribution hubs for independent filmmakers should continue to be explored.
- The post-secondary institutions should come together to establish cooperative programs between institutions designed to focus on specific needs of the workplace or on critical needs in professional infrastructure in the entertainment industry
- OFE needs to be fully staffed and funded to make a continual positive impression on the industry and aggressively marketing our state to the world.

Other states have also looked at the problem of growing a film industry. Many states are adopting strategies to make it easy to create, produce, and distribute film and other media productions from start to finish within their borders. They are encouraging the development of needed infrastructure, creating workforce development programs, and providing financing mechanisms for film and media projects.

The following conclusions are made as a result of the analysis undertaken in **this** report:

- There must a solid business case for choosing to film on location in Florida as well as a solid business case for operating facilities in Florida if the indigenous industry is to survive.
- While acquiring location shooting is attractive, it has become highly competitive and may not be a sustainable market for Florida. All things being relatively equal, productions are going to locations with the best incentive packages.
- A locally sustainable industry provides the best opportunity for economic development and employment growth, be it either in production, post production or game development.
- In an effort to be all things to everyone, a Florida location may turn out to mean little to anyone. Florida needs to focus its efforts on finding what makes “Filmed in Florida” a good thing or what makes Florida the place to shoot.
- Spanish language production is an obvious growth market for Florida.
- Attraction of film financing companies and/or the establishment of a loan fund may be keys in redeveloping the indigenous industry.
- Digital production, post-production and the gaming industry have the greatest growth potentials and may be the best target for incentive dollars.
- The conclusions listed in the 2006 Tourism Committee of the Florida House of Representatives State Infrastructure Council report, in so far as they have not already been addressed, are still valid and need to be considered and/or incorporated into any strategic plan.
- If Florida wants to attract location filming, anecdotal evidence suggests it is going to have to match or better the most attractive incentive programs. A Warner Brothers Worldwide executive commented in 2007, “in the past few years, financial incentives have overwhelmed the 'where to shoot' equation. Major studios and smart independents are going to locations that have the best incentives. It's as simple as that.” This would suggest that Florida incentives could include offering a choice between a cash rebate or a transferable tax credit; a low interest loan fund; an indigenous filmmaker loan fund; state paid internships for entertainment projects; and other such incentives not currently offered. These programs would need to be fully funded.

Continued analysis should be performed to determine what level of incentive will produce the highest return on Florida's investment in order to insure the cost effectiveness of the program.

- If Florida wants to attract post-production, it needs to focus on developing and redeveloping post-production facilities by offering start up and expansion facilities with incentives assistance. With the projected growth in digital technology within the industry, Florida needs to investigate incentives tailored toward attracting and retaining these businesses. Currently, business has a hard time accessing existing economic development incentives that support infrastructure development due to the project based nature of the industry. The State should look at modifying existing incentives to support bricks and mortar development in the Film and Entertainment Industry
- For long term stable industry growth, Florida may need to focus on niche markets within the broader Film and Entertainment Industry. This could particularly focus on Spanish language and other types of cable programming and television series as well as game development and Latin music.
- The concept of the "live back lot" may warrant further exploration in Florida as it tries to expand production centers to locations throughout the state. Florida has many communities with historic areas that could be suitable for this type of development and this type of development could prove suitable for infrastructure incentives.
- Florida's existing target industry structure as it relates to IT companies should be examined as to applicability to digital media entertainment company development within the State.

Purpose of the Study

The Governor's Office of Film and Entertainment commissioned the Haas Center for Business Research and Economic Development at the University of West Florida to analyze the Film and Entertainment Industry in the State of Florida. This study is an update of the prior 2003 study performed by Economic Research Associates that established a baseline of the size and extent of the industry in Florida. In order to ensure a measure of comparability with the prior study, in parts of the present study a similar definition of the Film and Entertainment Industry was used. However, the present study also broadens the definition by incorporating industry components not previously analyzed, such as still photography, sound recording and music, broadcasting, cable television, commercials, and digital media.

Defining the Industry

For purposes of this study, the following North American Industry Classification System codes are used to identify the employment components of the Film and Entertainment Industry:

- a. 512110 – Motion Picture and Video Production
- b. 512120 – Motion Picture and Video Distribution
- c. 512191 – Teleproduction and Other Postproduction Services
- d. 512199 – Other Motion Picture and Video Industries
- e. 512210 – Record Production
- f. 512240 – Sound Recording Studios
- g. 512290 – Other Sound Recording Industries
- h. 515120 – Television Broadcasting
- i. 515210 – Cable and Other Subscription Programming
- j. 541810 – Advertising Agencies
- k. 541922 – Commercial Photography
- l. 711130 – Musical Groups and Artists
- m. 711410 – Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
- n. 711510 – Independent Artists, Writers, and Performers
- o. 334612 – Prerecorded Compact Disc (except software), Tape, Record Reproducing

The Film and Entertainment Industry as defined here also includes a portion of the digital media industry, and the importance of this sector was included in examining the industry.

In this study, the size and economic importance of these NAICS-coded sectors is tabulated, along with growth rates for each of the sectors historically. This tabulation was made both at the aggregate level for the state of Florida, for each of the Enterprise Florida designated regions individually, and for individual counties in Florida. A listing of the counties comprising these regions is included in Appendix A.

Film History

The State of Florida has a long history in the motion picture industry thanks to its year-round sunshine, moderate climate and spectacular scenery.

In the early 20th century the motion picture industry was based in New York City. In need of a winter headquarters, moviemakers were attracted to Jacksonville, Florida due to its warm climate, exotic locations, excellent rail access, and cheaper labor, thus earning the city the title of "The Winter Film Capital of the World." New York-based Kalem Studios was the first to open a permanent studio in Jacksonville in 1908. Over the course of the next decade, more than 30 silent film companies established studios in town, including Metro Pictures (later MGM), Edison Studios, Majestic Films, King Bee Film Company, Vim Comedy Company, Norman Studios, Gaumont Studios, and Lubin Studios. The first motion picture made in Technicolor and the first feature-length color movie produced in the United States, *The Gulf Between*, was filmed on location in Jacksonville in 1917.

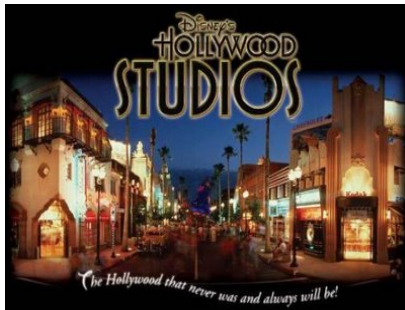


With the development of the studio system, the 1920s and 1930s saw film production moving away from Florida to Hollywood. After 1945, Florida experienced a film revival as Hollywood studios began filming on location. Movies shot all or in part in Florida included *They Were Expendable* (1945), *Key Largo* (1948), and *The Yearling* (1946). Location shooting continued through the 1950s and 1960s with films such as *Easy to Love* (1953) with Esther Williams and filmed at Cypress Gardens, the *Creature from the Black Lagoon* (1954), filmed in Wakulla Springs, *The Greatest Show on Earth* (1952), filmed in Sarasota, *Follow That Dream* (1962), starring Elvis Presley and filmed in Ocala, and *Goldfinger* (1964).



With films such as *Moon Over Miami* (1941), Florida became not only a production location but a star. It has been said that Miami is a place that plays itself, represents itself, and projects its own aesthetic and distinctiveness. Yet Miami works for a living as well. In the 1980s, Miami began to develop as an international center for Hispanic cultural production, particularly in the television and music industries. Development of the film and video industry expanded significantly with the filming of the television show *Miami Vice* (1984-89). With Miami-based TV Spanish language networks Univision and Telemundo, as well as the Spanish language divisions of other major cable networks such as Discovery Networks, MTV, and HBO, Miami has expanded into a vibrant production center.

In 1988, Universal Studios Florida opened in Orlando for television, motion picture, and commercial advertising production. The movie theme entertainment complex, a joint venture between MCA and Cineplex Odeon Corporation, included rides and attractions. The backlot and facilities accommodated small film and television projects, and some major motion picture production also took place there, including Imagine's *Parenthood*. Long-term agreements involved Unitel Video's television and mobile production facilities and Century III's all-digital edit bay. Hanna-Barbera Productions opened an animation studio and an attraction based on its popular cartoon characters at Universal Studios Florida, while cable network Nickelodeon produced most of its shows at its facility, including game shows that sought contestants and audience among studio visitors.



In 1989, Disney opened Disney MGM Studios, housing Walt Disney Feature Animation Florida, where Disney produced a number of projects, including *Mulan*, *Lilo & Stitch*, *Brother Bear*, and sequences from other 1990s-early 2000s Disney animated features. The second component was Walt Disney Studios Florida, which consisted of three sound stages used for various Disney movie and television projects, including The Disney Channel's *Mickey Mouse Club* and *Adventures in Wonderland*. Several third party productions also

used the Studios, including *Superboy* (first season only, from 1988-1989), *Thunder in Paradise*, a revival of *Let's Make a Deal*, special broadcasts of *Wheel of Fortune*, and airplane interior sequences for the feature film *Passenger 57*. Disney closed its animation facility at the park in 2004 and renamed the entire park Disney Hollywood Studios in 2008.

From 2002 to 2007, over 1,100 movies, TV series, videos and short subjects have been filmed in Florida. This number does not include countless commercials and productions that were filmed only in part in the Sunshine State.

Film and Entertainment Industry Economics

According to a recent Standard and Poor's report, the US movie and home entertainment business is experiencing sustained growth due to expanding audiences, pipelines, and content. Industries in this sector provide products and services for audiences around the world, including new films shown in theaters, video and music titles, and a wide range of television shows. Through differing distribution arrangements, content owners receive their revenues from various sources, such as the sale or rental of their products to consumers, advertising sales, and subscription services.

Companies in the movie and home entertainment industry are involved in the creation and delivery of programming for consumers. This programming is recorded on film, tape, disc or digitally so that it can

be seen or heard repeatedly. Large, diversified companies dominate the industry, finance the development of new products, have extensive libraries of products, and often own distribution channels for bringing content to the public.

Motion Picture Production

Movies today usually are made under a contract signed by a major distributor, a production company, and a collection of freelance talent. With a major theatrical film, a distributor typically funds a movie from start to finish or provides a portion of the financing in return for fees and a share of the proceeds. For many films, movie theater sales are no longer the principal source of revenues. Today, profitability often depends heavily on contributions from various home video and TV markets. See Table 1.

Table 1 - Top Grossing Distributors 1995 to 2008

Rank	Company	Movies	Total Gross	Average Gross	Market Share
1	Buena Vista	395	\$19,639,556,276	\$49,720,396	14.70%
2	Warner Bros.	408	\$18,124,360,487	\$44,422,452	13.57%
3	Sony Pictures	417	\$16,634,105,580	\$39,889,941	12.45%
4	20th Century Fox	305	\$15,564,912,781	\$51,032,501	11.65%
5	Universal	291	\$14,252,373,000	\$48,977,227	10.67%
6	Paramount Pictures	288	\$13,877,620,157	\$48,186,181	10.39%
7	New Line	204	\$7,960,960,385	\$39,024,316	5.96%
8	Dreamworks SKG	76	\$5,227,856,085	\$68,787,580	3.91%
9	Miramax	369	\$4,823,529,073	\$13,071,895	3.61%
10	MGM	243	\$4,351,401,601	\$17,907,002	3.26%

Source: MPAA

According to Nash Information Services, the average feature film costs \$65 million in pre-production, film, and post-production costs, with some of the most expensive films exceeding \$200 million. When a major studio shoots a big budget film on location, it can inject, according to the Motion Picture Association of America (MPAA), as much as \$225,000 per day into the location's economy.

But similar to other services, the largest expenses in movie production come from distribution rather than production expenses or raw materials. The selling of motion pictures can be as large a business as the production is itself. The cost of promoting a feature film is often of the same magnitude as the production of the film itself, with the average film spending \$34.4 million in prints and advertising.

Barriers to entry in the filmmaking and distribution business are not high, and the industry has seen a growth market in recent years for independent films ("indies"). Small companies can compete successfully by creating marketable movies, often directed to niche audiences, on low budgets.

Television and Cable

Although their market share is eroding, the four major broadcast networks (ABC, CBS, NBC, and Fox) remain the largest force in US television programming. For national advertisers, these networks continue to provide household penetration and viewership levels not available elsewhere. The production of TV shows is similar to the movie business in many ways. Good cash flow from program libraries helps to finance new shows. Larger companies often contract for or jointly produce shows with

smaller firms, and often distribute and market programs produced by others. The creation of a successful show by any production business can help generate additional network commitments.

The cable system industry provides an economical and convenient delivery medium for entertainment and information. The industry comprises the pipeline companies that deliver cable signals to consumers' homes via wired systems. Annual revenues total more than \$75 billion, the bulk of which comes from viewer subscriptions. In recent years, cable networks have increased their investment in original programming, as well as major-league sports events and made-for-TV movies.

Future Trends

The Film and Entertainment Industry is an industry characterized by rapid changes, owing to the industry's increasing dependence on technology. The industry, encompassing films, recorded music, video, television and cable broadcasting, is anticipated to offer promising growth opportunities, driven by the rapid adoption of digital technologies, and changing consumer preferences.

According to Standard & Poor's Industry Survey on Movies and Home Entertainment, "the convergence of media platforms, combined with the expansion in media outlets and the expansion of ways to package and format content, are providing both opportunities and challenges" to industry participants. For example, the explosion in social networking and user-content sites is not only accelerating content fragmentation, but also moving a large degree of control away from businesses and into the hands of consumers. Furthermore, the growth in digital formats has sharply boosted competitive conditions in media. See Table 2.

Table 2 - Top Grossing Movie Production Methods 1995 to 2008

Rank	Method	Movies	Total Gross	Average Gross	Market Share
1	Live Action	6,049	\$114,274,258,617	\$18,891,430	85.71%
2	Animation/Live Action	58	\$7,851,293,887	\$135,367,136	5.89%
3	Digital Animation	78	\$7,260,565,865	\$93,084,178	5.45%
4	Hand Animation	103	\$3,424,433,532	\$33,246,927	2.57%
5	Stop-Motion Animation	14	\$321,337,376	\$22,952,670	0.24%
6	Rotoscoping	9	\$9,289,300	\$1,032,144	0.01%
7	Multiple Production Methods	5	\$1,021,618	\$204,324	0.00%

Source: MPAA

The economics of the movie and home entertainment industry are undergoing long-term changes as technological developments have altered and expanded distribution channels. Hollywood's movie studios and the television (TV) networks are actively seeking to exploit the expanding universe of direct-to-consumer online distribution channels for video.

In the TV business, cable networks have been gaining a greater share of viewers and advertising dollars from the broadcast networks. Their purchases of high-profile programming are increasing, boosting their competitive position even further.

In the video and music industries, Internet downloading and digitally recorded discs have eclipsed older technologies. Discs' image and sound quality, playback features, and durability are superior to those of tape. Increasingly, consumers are making personal recordings at home directly onto their computers or wireless handheld devices.

Entertainment delivery mechanisms are changing. Just as radios and record players brought musical entertainment out of the concert hall and into the home, so has cable programming, DVD's and streaming video brought filmed entertainment out of the movie theater. With this shift has come increased demand for content.

These overall future growth trends that appear to be developing within the industry include:

Value Creation

The DVD industry has shifted the value creation within the film industry, enabling smaller independent studios to develop their own portfolio of film products. This intellectual property creates ongoing revenue streams which define an entirely new market value to film production companies.

Special Effects

Special effects in movies are increasingly sophisticated. The growth of companies like LucasFilm's Industrial Light and Magic (ILM), Pixar, Silicon Graphics and others, means that entertainment is increasingly blurring the line between creativity and engineering. The desire for bigger and better effects will spur on the development of digital technologies and drive the need for a skilled digital media workforce.

Video/music-on-demand

With time gap from theatrical-to-video release shortening, the home video sector is expected to emerge as the principal beneficiary, with the widespread popularity of US-based films in non-US regions being critical for the expansion of the market. While previous video-on-demand experiments have been launched unsuccessfully in recent years, the conventional wisdom is that they failed because the technology had not caught up to the concept. This is no longer the case and VOD is a critical part of all digital subscriber packages and represents a tremendous shift in the current revenue stream of content providers. Increased bandwidth and the development of digital devices has increased the popularity of music-on-demand and downloading services. A new model of Internet radio is also developing that allows users to tune playlists without having to select individual songs.

Direct to DVD/Blu-Ray

The film industry has undergone significant change in the past few years including a shift in distribution with films released directly to the DVD/Blu-Ray market, thus avoiding the costly and often unprofitable theatrical release if warranted by the product and deal. This shift has increased the influence of the film distributors, who now offer minimum guarantees and significant upfront payments which can guarantee the profitability of an individual film, which lower the cost of overall production.

Convergence

Convergence is about the integration of several mediums of entertainment-usually involving digital media and the Internet. It can be TV and the Internet, magazines and the internet, books and the internet, movies and the Internet, or even just Internet marketing and Internet content. Streaming media, live chat capabilities, targeted advertising and audience testing are all becoming simpler and more popular with broadband penetration, and the prime benefits of these kinds of features is that they can ultimately drive additional revenue streams and cut expensive production costs down. The most lucrative professional opportunities within convergence are generally in graphic design, web development, content creation and direct marketing.

Minority Buying Power

As both the population of U.S. becomes more diverse, new challenges - and opportunities - arise for businesses to reach waiting buyers. Minorities in the US, especially African Americans, Asians, Native Americans and Hispanics – are expected to increase in number and purchasing power and their growing shares of the U.S. consumer market draw attention from producers, retailers and service providers. As the U.S. consumer market becomes more diverse, advertising, products and the media must be tailored to reach each market segment.

Micromarketing

With the explosion of cable networks and the existence of countless niches within publishing and on the Internet, it is now possible to target prospective clients more precisely than ever before. Additionally, while localizing content seems an obvious part of entering foreign markets, it is still something that is often neglected. This century will likely change that, especially as major entertainment companies expand to other markets through acquisitions, alliances with local players and Internet portals targeted to regional markets. This will put more pressure on major networks like NBC and ABC to squeeze more revenue out of their remaining mass market products. On the positive side, there are more opportunities for consultants and marketers who can address the needs of target audiences.

Product Placement and Sponsorship

While content is the bread-and-butter of media and entertainment companies, content is also hit-driven and cyclical in nature. To provide a steady cash flow, companies will continue to rely on corporate sponsorships to provide regular revenue streams.

Video Gaming Industry

As digital technology advances, so do video games, which are already a multi-billion dollar industry. Many franchises within entertainment have proven that a popular character can create billions for a company, and video games are no exception to that rule. "This is perhaps the biggest growth engine in the entire entertainment industry," said one investment analyst covering media companies. New technologies for film and game development, which substantially lower the cost of production, will create major efficiencies. The new trend is to release video games and ancillary merchandise directly

related to a film project. Larger studios are creating films as a launch strategy for the games, as the video game market is massive and its revenue potential far exceeds that of film.

Music for Free

Industry experts feel that the business model that will win out for music is giving it away. Artists will give away recorded music and consider it as a promotional tool to build a brand, just as was done with music videos. All of the revenue in music will be generated in other ways, such as in live performances, promotional items and sponsored events.

Film and Entertainment Industry Sectors

Employment

In order to better understand the extent of the Film and Entertainment Industry within Florida, employment data was analyzed at the 6-digit NAICS industry level from the Quarterly Census of Employment and Wages (QCEW). The QCEW program publishes a quarterly count of employment and wages reported by employers covering 98 percent of U.S. jobs, available at the county, MSA, state and national levels by industry. Jobs that are exempt or otherwise not covered by unemployment insurance are not included in the QCEW tabulations. Also, some data were suppressed under the data sharing agreement between the Haas Center and the Agency for Workforce Innovation.

While QCEW captures the majority on employment in most industries, the Film and Entertainment industry is actually dominated by freelance and independent contractors. One component of the Florida Film and Entertainment Industry, for example, is the Independent Artists, Writers and Performers industry (NAICS 711510). The formal definition of this industry encompasses many freelance actors, writers, producers and others not covered by unemployment insurance programs. Thus it should be noted that QCEW data may grossly underestimate the number of workers in this sector. See Appendix B.

Establishments

Establishment data was also taken from the QCEW data. An establishment is an economic unit, such as a farm, mine, factory, or store that produces goods or provides services. It is typically at a single physical location and engaged in one, or predominantly one, type of economic activity for which a single industrial classification may be applied.

Economic Importance

Economic importance was measured using location quotients for 2002 and 2007. In general, location quotients are ratios that compare the concentration of a resource or activity, such as employment, in a defined area to that of a larger area or base. For example, location quotients can be used to compare State employment by industry to that of the nation; or employment in a city, county, metropolitan statistical area (MSA), or other defined geographic sub-area to that in the State. The location quotients

in the table below compare the employment concentration in the selected county or region to the nation as a whole.

A location quotient greater than one implies that the industry is producing more goods and services than are consumed locally. Thus, the industry must be a net exporter of the goods or services to non-local consumers, and in the process, bringing outside spending into the local area. A high location quotient is indicative of a comparative advantage for that particular business sector relative to other areas in the country.

Figure 1 - Film and Entertainment Industry Employment 2002-2007

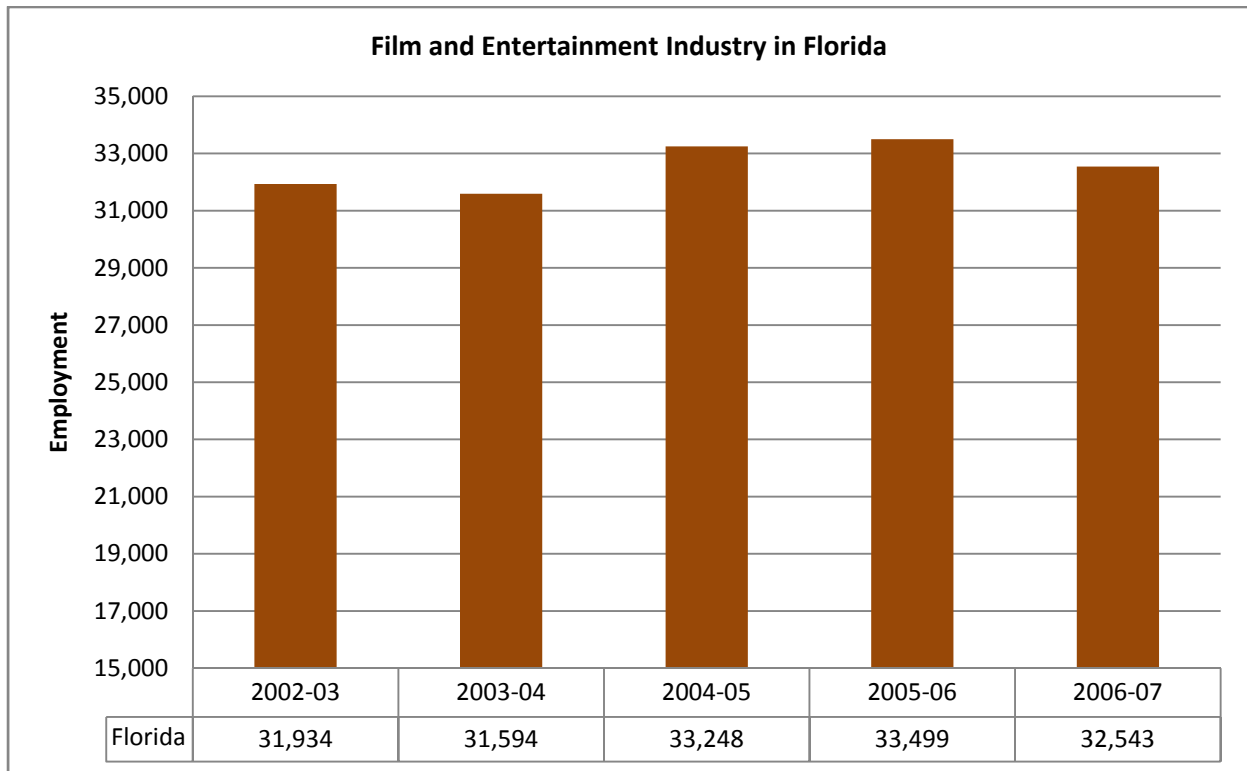


Table 3 - Establishments in the Florida Film and Entertainment Industry 2002-2007

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Florida	16,692	17,910	21,023	22,136	22,597	35%	0.86	0.84

Employment in the overall Film and Entertainment Industry has remained relatively constant, although the number of establishments grew by 35 percent between 2002 and 2007. Approximately one half of total state employment and total establishments are located in the Southeast region. Employment has been relatively steady in all of the Florida regions since 2002, with the exception of the East Central Region, which seen a gain of nearly 1,000 jobs during the time period. See Table 3.

Figure 2 - Employment by Florida Region 2002-2007

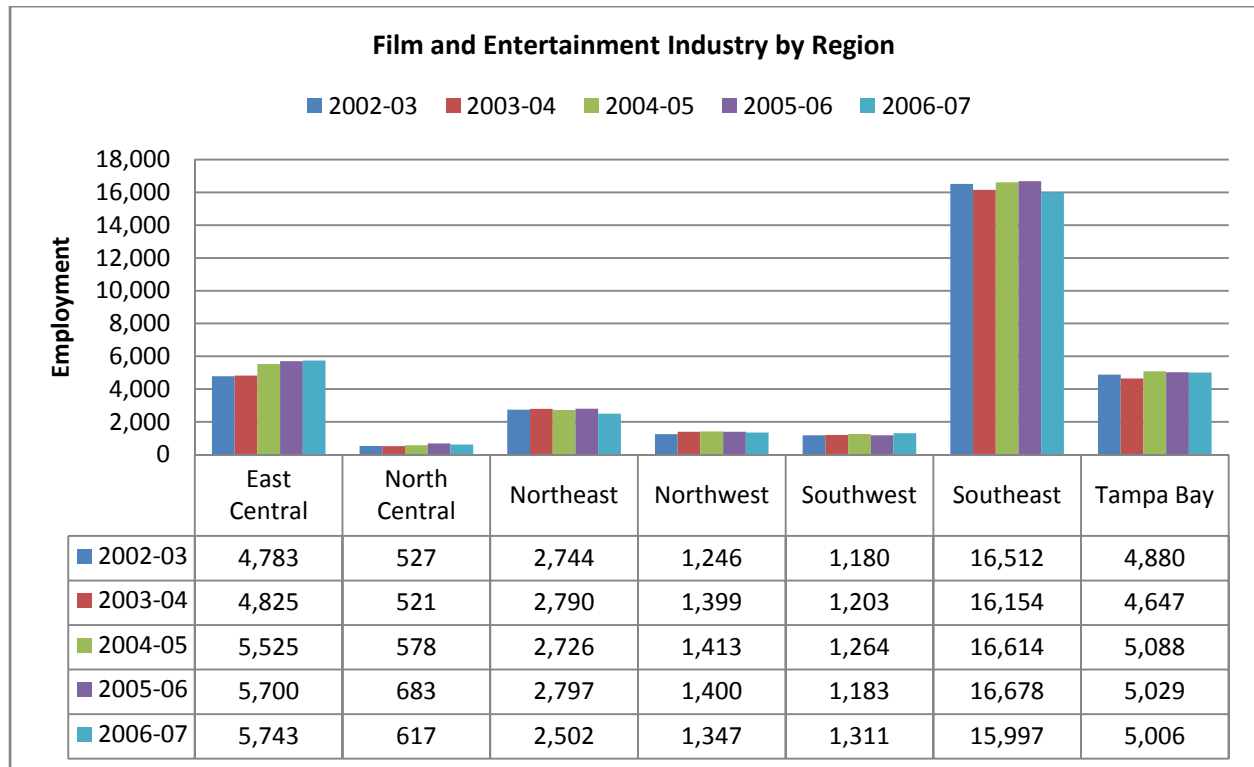


Table 4 - Establishments in Florida by Region 2002-2007

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	2,686	2,800	3,306	3,645	3,882	45%	0.87	0.88
North Central	342	363	448	516	521	52%	0.57	0.60
Northeast	867	903	1,072	1,191	1,184	37%	0.78	0.83
Northwest	742	769	863	921	912	23%	0.65	0.66
South Central	44	37	38	39	42	-5%	0.33	0.28
Southwest	636	681	874	908	942	48%	0.82	0.75
Southeast	8,353	9,173	10,716	11,093	11,237	35%	1.07	1.01
Tampa Bay	3,022	3,184	3,706	3,823	3,877	28%	0.71	0.71

Figure 3 - Employment by Selected Counties 2002-2007

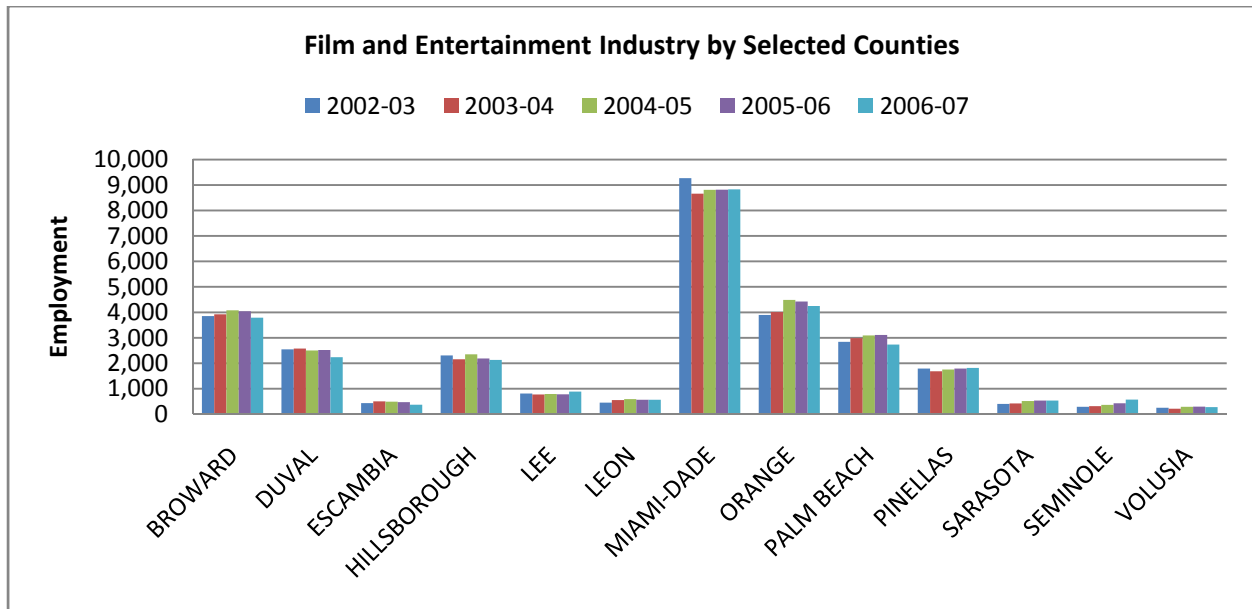


Table 5 - Employment by County 2002-2007

Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	380	375	424	407	400
BAY	237	215	197	183	187
BREVARD	193	153	191	263	294
BROWARD	3,856	3,922	4,081	4,041	3,791
CHARLOTTE	8	15	24	22	19
CITRUS	28	27	26	27	21
CLAY	72	79	80	101	81
COLLIER	362	413	448	384	404
COLUMBIA	27	20	25	23	14
DUVAL	2,548	2,577	2,504	2,520	2,237
ESCAMBIA	431	502	489	468	368
FLAGLER	9	10	13	19	14
GADSDEN	1	3	3	36	63
GILCHRIST	5	6	4	6	17
HAMILTON	-	-	3	109	42
HERNANDO	42	39	46	44	41
HILLSBOROUGH	2,304	2,154	2,352	2,187	2,132
INDIAN RIVER	97	102	100	117	87
JACKSON	22	21	21	18	21
LAKE	79	82	87	91	86
LEE	811	774	792	777	888
LEON	449	555	592	566	565

MANATEE	90	84	103	128	133
MARION	91	93	105	121	133
MARTIN	222	217	205	237	198
MIAMI-DADE	9,268	8,659	8,811	8,820	8,834
MONROE	71	102	108	88	69
NASSAU	19	22	26	32	23
OKALOOSA	38	43	50	64	73
OKEECHOBEE	36	33	25	15	8
ORANGE	3,898	4,010	4,489	4,423	4,247
OSCEOLA	59	48	101	187	246
PALM BEACH	2,844	2,985	3,092	3,109	2,737
PASCO	95	99	126	138	147
PINELLAS	1,794	1,682	1,752	1,791	1,820
POLK	126	141	167	175	181
SANTA ROSA	18	23	24	23	23
SARASOTA	400	422	515	537	531
SEMINOLE	292	315	361	425	573
ST JOHNS	84	92	92	110	133
ST LUCIE	156	166	217	266	281
SUMTER	10	6	6	16	21
VOLUSIA	254	212	290	295	277
WALTON	22	15	22	26	32

Table 6 - Establishments by County 2002-2007

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	176	186	237	255	264	50%	0.75	0.89
BAKER	4	4	6	8	6	50%	0.39	0.17
BAY	89	101	104	76	78	-12%	0.72	0.72
BRADFORD	4	8	8	8	6	50%	0.65	0.47
BREVARD	243	240	265	314	365	50%	0.67	0.75
BROWARD	2,351	2,657	3,103	3,217	3,346	42%	1.01	0.94
CHARLOTTE	16	31	45	36	32	100%	0.72	0.78
CITRUS	36	35	41	44	45	25%	0.83	0.63
CLAY	44	54	65	92	91	107%	0.78	0.65
COLLIER	241	266	321	347	350	45%	0.77	0.76
COLUMBIA	16	14	14	10	13	-19%	0.21	0.16
DUVAL	671	684	758	804	811	21%	0.81	0.88
ESCAMBIA	196	207	219	236	231	18%	0.76	0.69
FLAGLER	28	26	35	47	52	86%	0.35	0.43
FRANKLIN	6	4	6	9	12	100%	0.87	0.65

GADSDEN	6	7	8	14	20	233%	0.20	0.42
GILCHRIST	4	4	2	7	8	100%	0.71	0.85
HENDRY	8	8	8	11	9	13%	0.31	0.27
HERNANDO	36	34	52	74	70	94%	0.63	0.60
HIGHLANDS	16	9	12	16	18	13%	0.38	0.32
HILLSBOROUGH	1,108	1,135	1,234	1,260	1,297	17%	0.67	0.62
HOLMES	6	8	7	4	4	-33%	0.54	0.42
INDIAN RIVER	72	82	96	115	126	75%	0.59	0.64
JACKSON	4	4	8	13	18	350%	0.28	0.18
LAKE	133	127	137	157	164	23%	0.68	0.57
LEE	379	384	508	525	560	48%	0.88	0.74
LEON	257	255	286	297	303	18%	0.77	0.90
LEVY	8	8	11	14	13	63%	0.52	0.68
MANATEE	130	141	203	220	216	66%	0.61	0.60
MARION	118	133	164	197	203	72%	0.50	0.47
MARTIN	145	135	142	146	171	18%	0.93	0.90
MIAMI-DADE	4,103	4,468	5,040	5,143	5,017	22%	1.21	1.17
MONROE	100	122	143	142	135	35%	1.26	1.57
NASSAU	19	22	35	47	43	126%	0.74	0.88
OKALOOSA	96	104	124	120	117	22%	0.42	0.51
OKEECHOBEE	16	14	12	8	7	-56%	0.55	0.31
ORANGE	1,513	1,590	1,852	2,008	2,124	40%	1.08	1.06
OSCEOLA	86	82	121	159	171	99%	0.43	0.59
PALM BEACH	1,487	1,628	2,087	2,213	2,317	56%	0.96	0.84
PASCO	92	112	176	209	236	157%	0.51	0.55
PINELLAS	1,031	1,100	1,241	1,241	1,239	20%	0.90	0.91
POLK	138	168	184	225	250	81%	0.40	0.45
PUTNAM	8	9	14	21	22	175%	0.30	0.31
SANTA ROSA	34	34	48	69	54	59%	0.75	0.52
SARASOTA	451	459	575	550	524	16%	0.91	1.01
SEMINOLE	426	491	610	639	666	56%	0.81	0.92
ST JOHNS	93	104	159	172	159	71%	0.90	0.90
ST LUCIE	95	81	105	117	125	32%	0.77	0.81
SUMTER	18	14	12	28	40	122%	0.51	0.36
SUWANNEE	12	6	6	11	6	-50%	0.41	0.27
VOLUSIA	267	256	309	340	352	32%	0.63	0.60
WAKULLA	8	5	6	6	4	-50%	0.72	0.61
WALTON	34	35	40	58	55	62%	0.77	0.57
WASHINGTON	0	0	5	10	9	NC	0.15	0.28

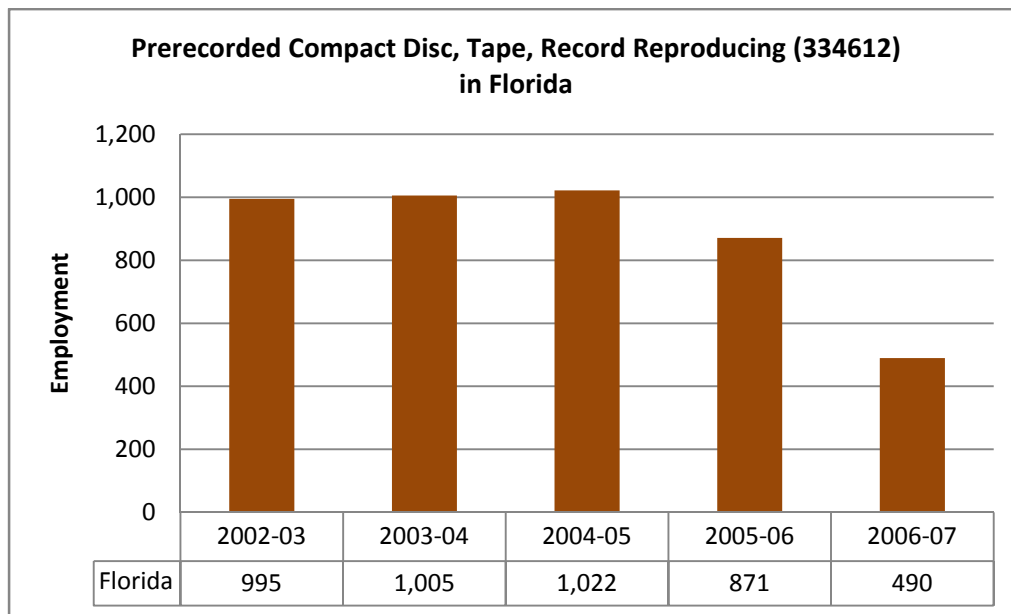
NC = Not Calculable

Source: Agency for Workforce Innovation.

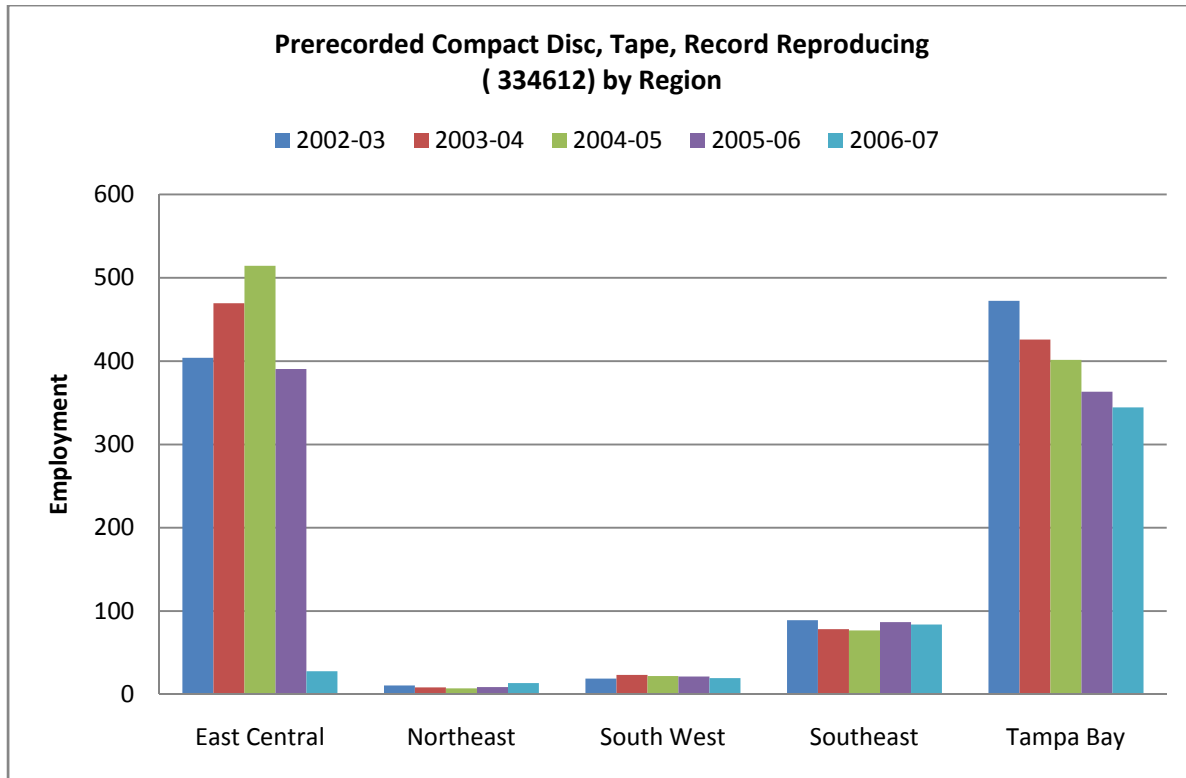
Component Industries

334612 Prerecorded Compact Disc (except Software), Tape, and Record Reproducing

This U.S. industry comprises establishments primarily engaged in mass reproducing audio and video material on magnetic or optical media. Examples of products mass reproduced by these establishments are audio compact discs, prerecorded audio and video cassettes, and laser discs. Overall Florida employment has declined significantly in this industry, with the Tampa Bay region being the only region to maintain significant employment in the industry.

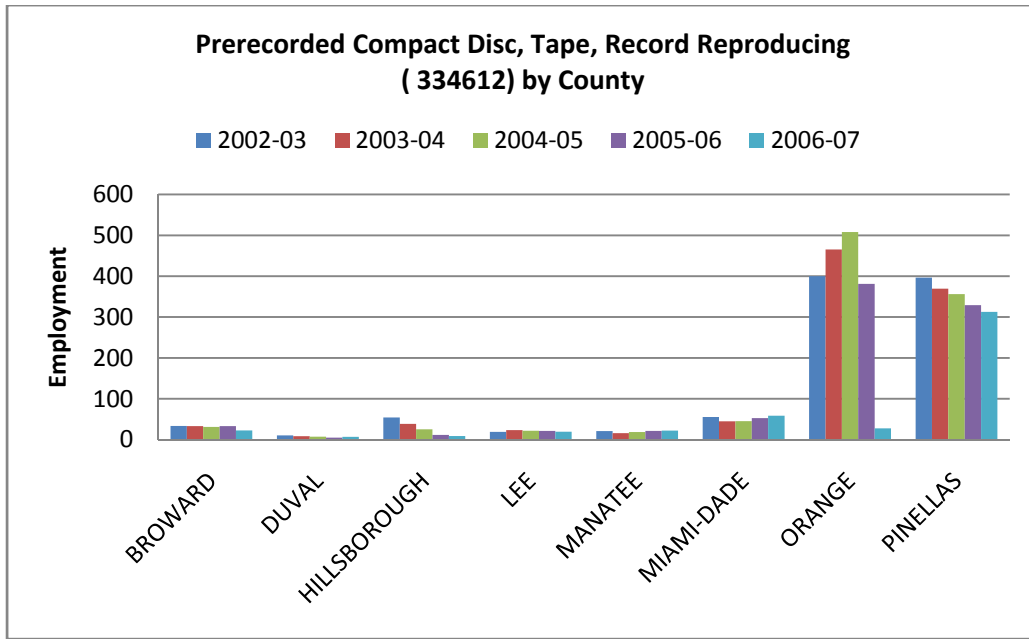


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Florida	115	101	99	104	107	-7%	0.73	0.43



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	404	469	514	391	28
Northeast	11	8	7	9	14
South West	19	23	22	22	20
Southeast	89	78	77	87	84
Tampa Bay	472	426	402	363	344

Establishments	2002-	2003-	2004-	2005-	2006-	Growth	2002	2007
	03	04	05	06	07	2002 to 2007	Location Quotient	Location Quotient
East Central	26	20	21	21	14	-46%	1.75	0.33
Northeast	8	8	8	9	10	25%	0.26	0.24
Southwest	4	4	4	4	4	0%	NA	NA
Southeast	60	51	46	44	51	-15%	0.22	0.2
Tampa Bay	17	18	20	26	28	65%	1.42	1.2



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
BROWARD	34	33	31	33	23
DUVAL	11	8	7	5	7
HILLSBOROUGH	55	39	25	12	9
LEE	19	23	22	22	20
MANATEE	21	16	19	22	22
MIAMI-DADE	55	45	46	53	59
ORANGE	400	465	508	381	28
PINELLAS	396	369	356	329	313

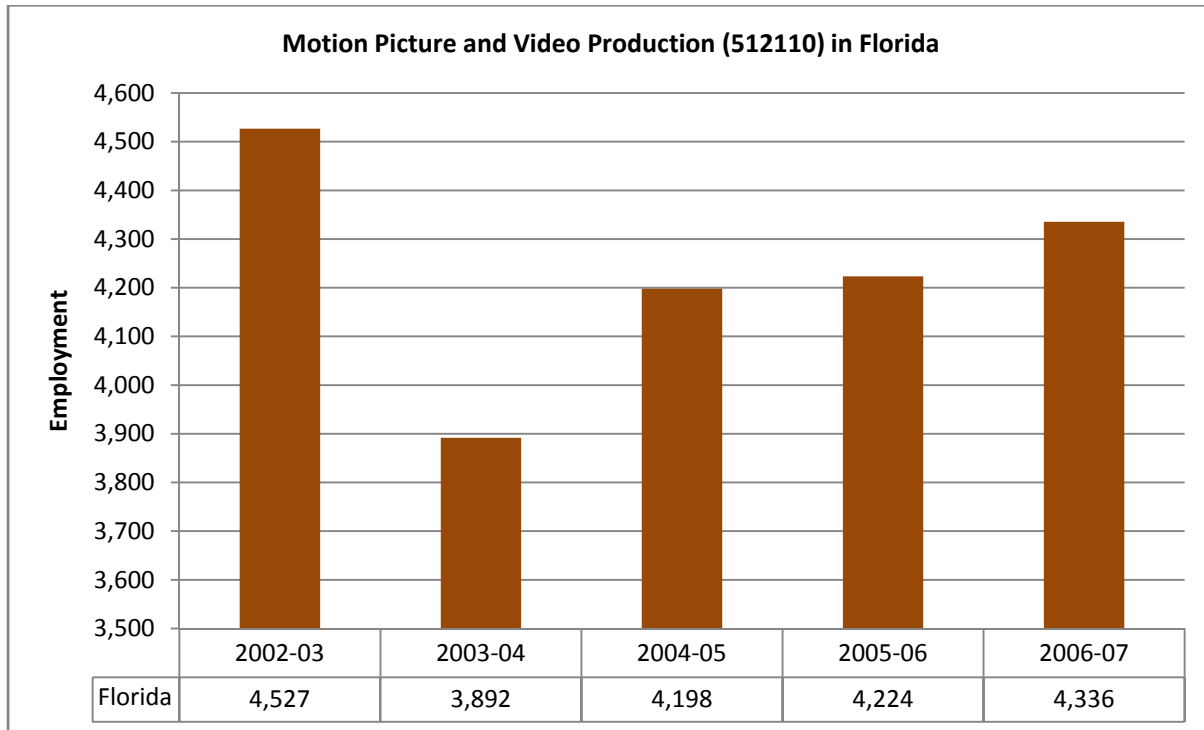
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
BROWARD	20	18	18	14	16	-20%	0.25	0.16
DUVAL	8	8	8	7	6	-25%	0.34	0.09
HILLSBOROUGH	5	4	6	8	8	60%	0.45	0.13
LEE	4	4	4	4	4	0%	0.1	0.15
MANATEE	4	4	4	8	8	100%	0.04	1.27
MIAMI-DADE	40	33	28	28	31	-23%	0.35	0.38
ORANGE	18	16	14	13	10	-44%	3.38	0.29
PINELLAS	6	4	4	6	8	33%	4.74	4.0
SEMINOLE	8	4	7	8	0	-100%	1.09	1.47

NA = Not Available

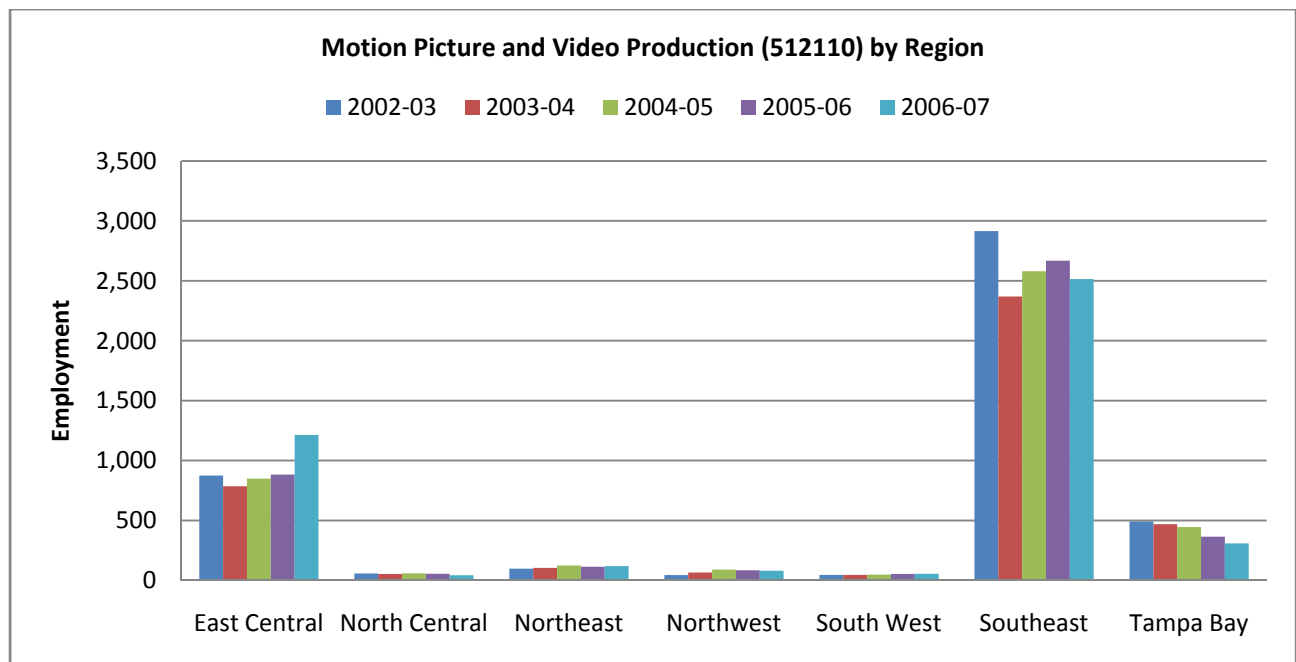
Source: Agency for Workforce Innovation. Employment data suppressed for Clay, Palm Beach, Pasco, and Seminole counties

512110 Motion Picture and Video Production

This industry comprises establishments primarily engaged in producing, or producing and distributing motion pictures, videos, television programs, or television commercials. After suffering a lull during 2003/04, employment in this industry has increased to every year since. Employment in the Southeast region represents about half of the total state employment, although employment in the East Central region grew by nearly 350 between 2002 and 2007.

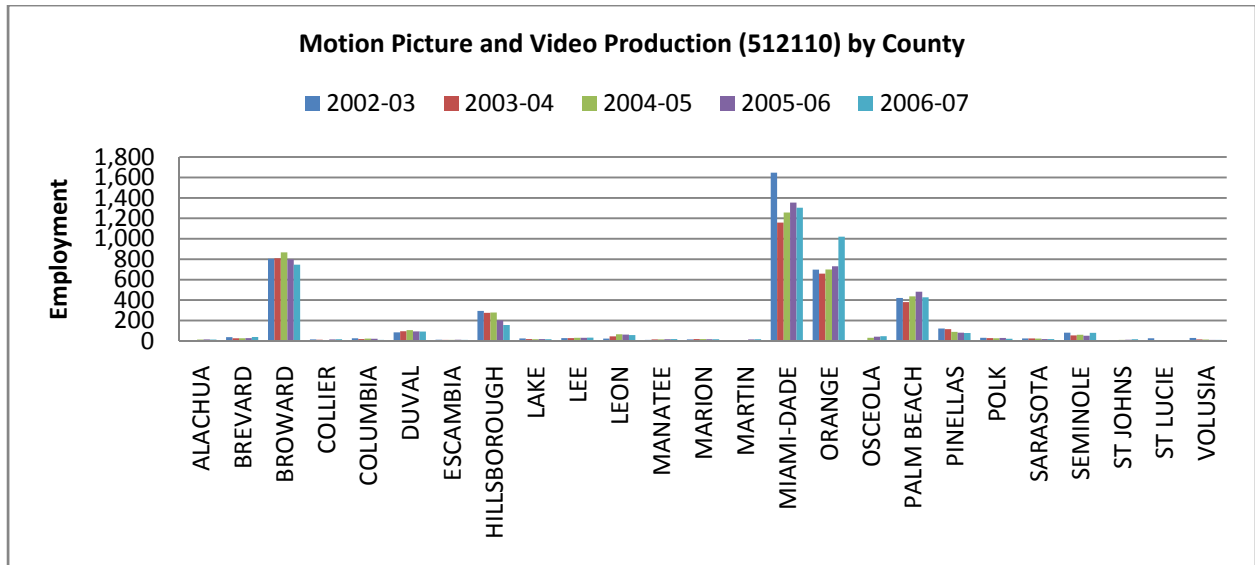


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Florida	3,258	3,477	3,979	3,891	3,847	18%	0.54	0.42



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	875	785	849	883	1,214
North Central	58	53	59	54	43
Northeast	98	104	125	114	119
Northwest	44	66	89	84	80
South West	45	45	49	53	55
Southeast	2,916	2,369	2,580	2,668	2,514
Tampa Bay	492	469	444	365	309

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	596	614	670	695	756	27%	0.67	0.69
North Central	74	75	75	75	75	1%	0.10	0.08
Northeast	149	147	188	180	166	11%	0.16	0.16
Northwest	90	99	116	113	109	21%	0.12	0.13
South Central	4	4	4	7	6	50%	0.13	0.05
Southwest	93	91	118	116	114	23%	0.13	0.12
Southeast	1,742	1,905	2,199	2,115	2,063	18%	0.99	0.71
Tampa Bay	510	542	609	590	558	9%	0.23	0.14



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	10	9	14	15	14
BREVARD	37	26	26	29	40
BROWARD	804	809	867	799	747
COLLIER	15	12	9	15	18
COLUMBIA	26	19	24	22	11
DUVAL	85	96	107	93	92
ESCAMBIA	13	11	12	12	11
HILLSBOROUGH	295	275	279	202	157
LAKE	24	18	17	19	17
LEE	28	29	31	31	33
LEON	24	45	65	63	58
MANATEE	11	15	15	18	19
MARION	16	18	18	17	18
MARTIN	5	4	6	15	17
MIAMI-DADE	1,647	1,158	1,258	1,354	1,305
ORANGE	699	660	699	731	1,021
OSCEOLA	2	10	31	42	47
PALM BEACH	421	381	437	482	428
PINELLAS	122	116	89	82	79
POLK	31	29	27	30	22
SARASOTA	25	25	24	19	19
SEMINOLE	81	54	61	52	80
ST JOHNS	7	3	11	12	18
ST LUCIE	26	5	4	8	9
VOLUSIA	31	16	14	11	11

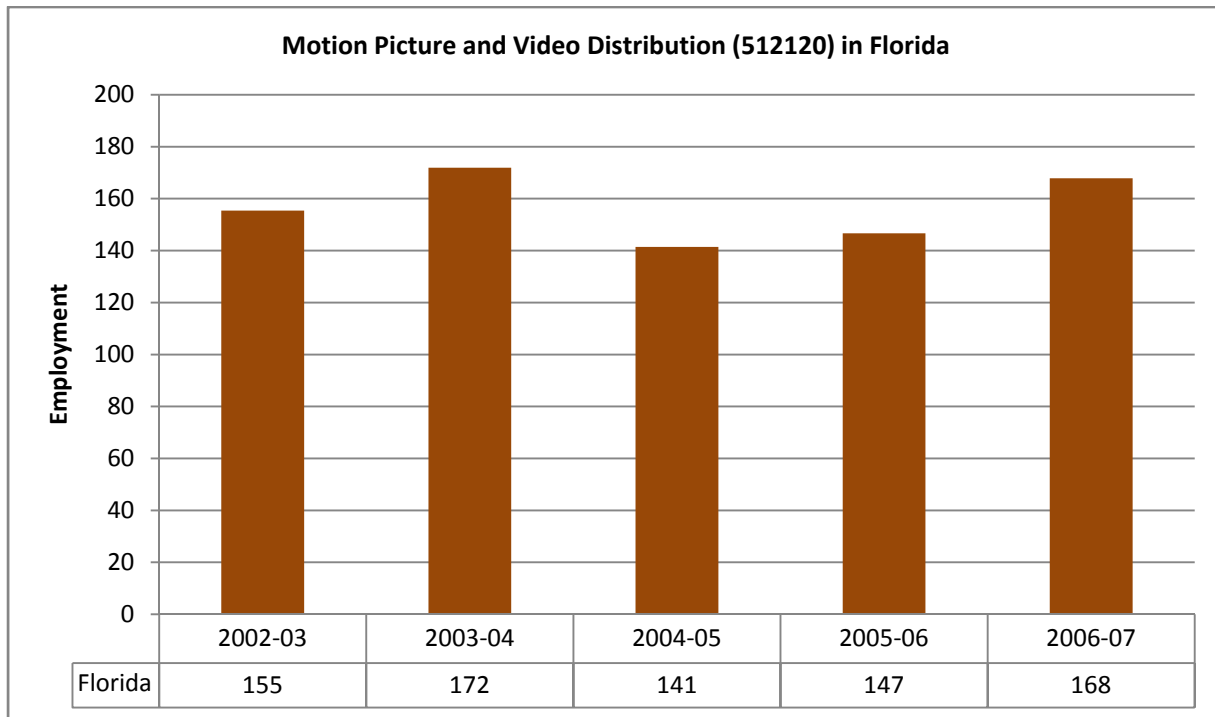
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	28	26	30	31	30	7%	0.10	0.09
BAY	4	9	12	9	11	175%	0.09	0.01
BREVARD	47	42	36	39	47	0%	0.13	0.14
BROWARD	421	535	624	595	588	40%	0.84	0.72
CHARLOTTE	4	6	9	7	4	0%	0.24	0.20
CITRUS	8	11	10	8	8	0%	0.13	0.01
CLAY	13	14	16	19	16	23%	0.10	0.10
COLLIER	31	30	34	39	41	32%	0.10	0.10
COLUMBIA	9	9	4	4	4	-56%	0.04	0.14
DUVAL	121	121	135	125	118	-2%	0.18	0.17
ESCAMBIA	23	24	24	22	20	-13%	0.08	0.07
HILLSBOROUGH	193	197	201	198	186	-4%	0.34	0.19
INDIAN RIVER	6	8	13	14	16	167%	0.16	0.07
LAKE	36	30	28	39	40	11%	0.47	0.20
LEE	58	55	75	70	69	19%	0.11	0.11
LEON	41	49	51	56	58	41%	0.14	0.31
MANATEE	38	41	51	50	45	18%	0.09	0.09
MARION	29	35	38	36	37	28%	0.14	0.08
MARTIN	14	8	12	11	27	93%	0.01	0.17
MIAMI-DADE	994	1,040	1,163	1,084	1,018	2%	1.44	0.92
MONROE	14	12	16	18	16	14%	0.11	0.04
NASSAU	0	1	6	7	8	NC	0.00	0.03
OKALOOSA	7	8	12	8	0	-100%	0.02	0.01
ORANGE	367	390	426	430	464	26%	1.04	1.22
OSCEOLA	10	12	26	38	45	350%	0.09	0.53
PALM BEACH	285	297	365	381	384	35%	0.67	0.54
PASCO	5	10	22	23	22	340%	0.05	0.08
PINELLAS	173	184	204	202	195	13%	0.28	0.15
POLK	32	33	34	41	38	19%	0.12	0.08
SARASOTA	57	62	85	68	62	9%	0.11	0.10
SEMINOLE	98	105	121	106	117	19%	0.70	0.34
ST JOHNS	8	10	31	29	24	200%	0.12	0.28
ST LUCIE	8	5	6	12	14	75%	0.21	0.14
VOLUSIA	36	33	33	43	43	19%	0.22	0.04

NC = Not Calculable

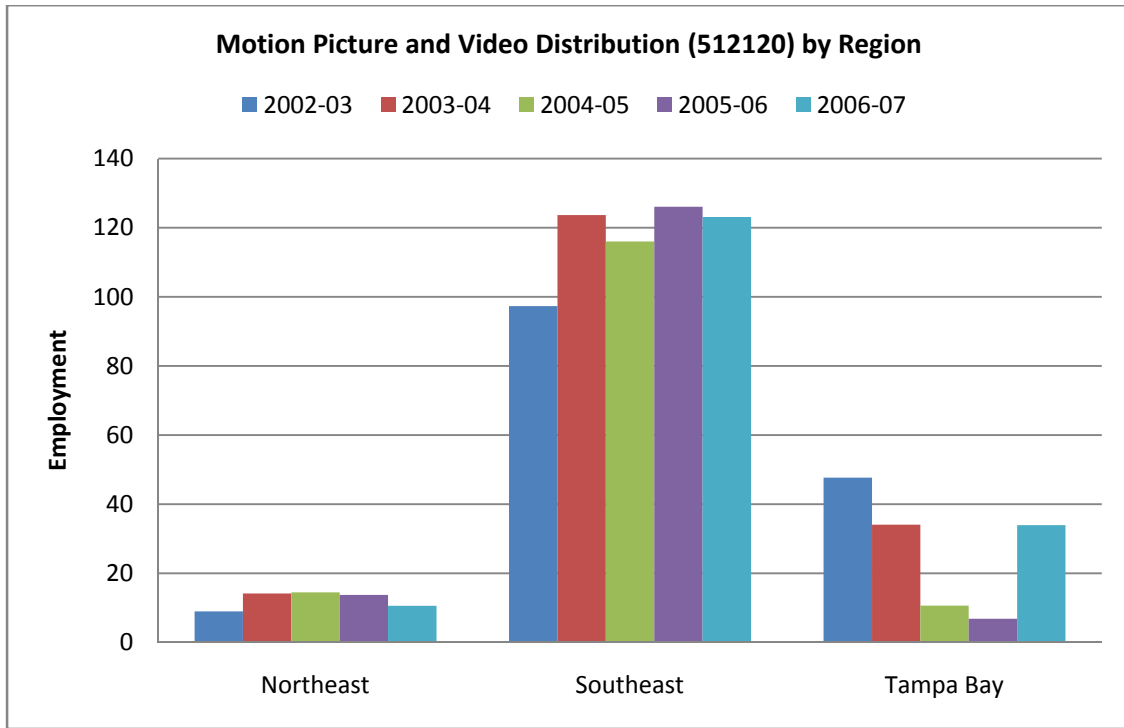
Source: Agency for Workforce Innovation. Employment data suppressed for Bay, Charlotte, Citrus, Clay, Flagler, Gilchrist, Hendry, Hernando, Indian River, Levy, Monroe, Nassau, Pasco, Okaloosa, Santa Rosa, Suwannee, Wakulla, Walton, and Washington counties

512120 Motion Picture and Video Distribution

This industry comprises establishments primarily engaged in acquiring distribution rights and distributing film and video productions to motion picture theaters, television networks and stations, and exhibitors. Employment in this industry is relatively small within the state, and is primarily located in the Southeast Region.

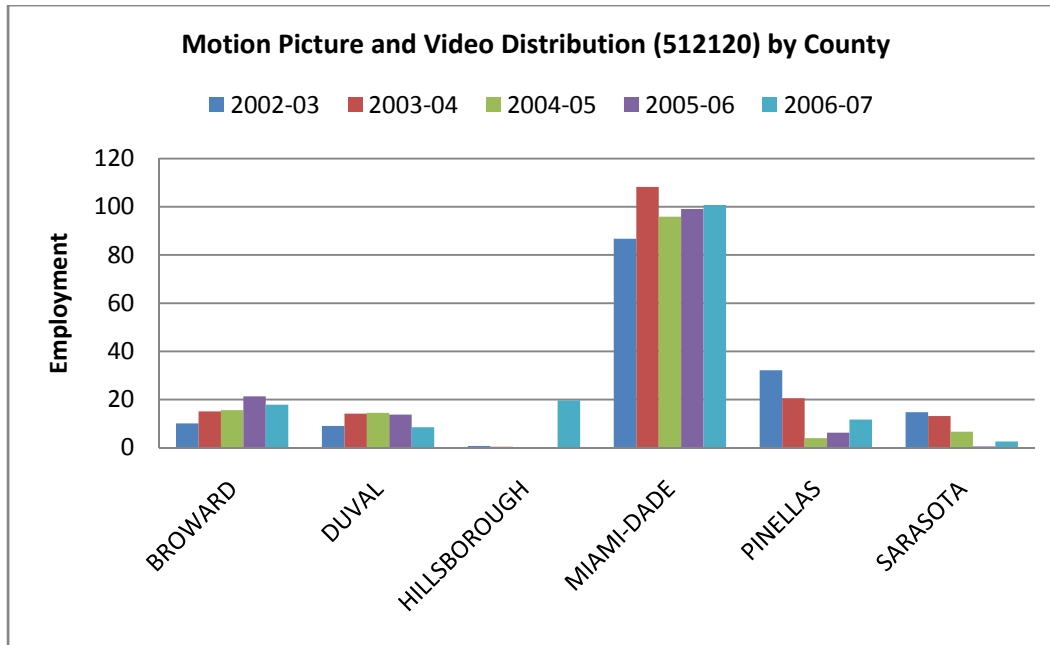


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	145	126	107	115	116	-20%	0.32	0.40



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
Northeast	9	14	15	14	11
Southeast	97	124	116	126	123
Tampa Bay	48	34	11	7	34

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	5	0	2	0	3	-40%	0.10	0.04
Northeast	10	14	12	10	8	-20%	0.20	0.52
Northwest	2	0	0	0	0	-100%	NA	NA
Southeast	98	82	77	87	82	-16%	0.56	0.80
Tampa Bay	30	30	16	16	23	-23%	0.35	0.35



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
BROWARD	10	15	16	21	18
DUVAL	9	14	15	14	9
HILLSBOROUGH	1	0	0	0	20
MIAMI-DADE	87	108	96	99	101
PINELLAS	32	21	4	6	12
SARASOTA	15	13	7	1	3

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
BROWARD	32	25	18	14	12	-63%	0.16	0.39
DUVAL	10	14	12	10	6	-40%	0.27	0.66
HILLSBOROUGH	6	7	0	4	2	-67%	0.09	0.62
MIAMI-DADE	64	55	50	52	50	-22%	1.18	1.65
PALM BEACH	2	2	9	21	20	NC	0.09	0.10
PINELLAS	16	15	10	10	17	6%	0.94	0.49
SARASOTA	8	8	4	2	4	-50%	0.64	0.05

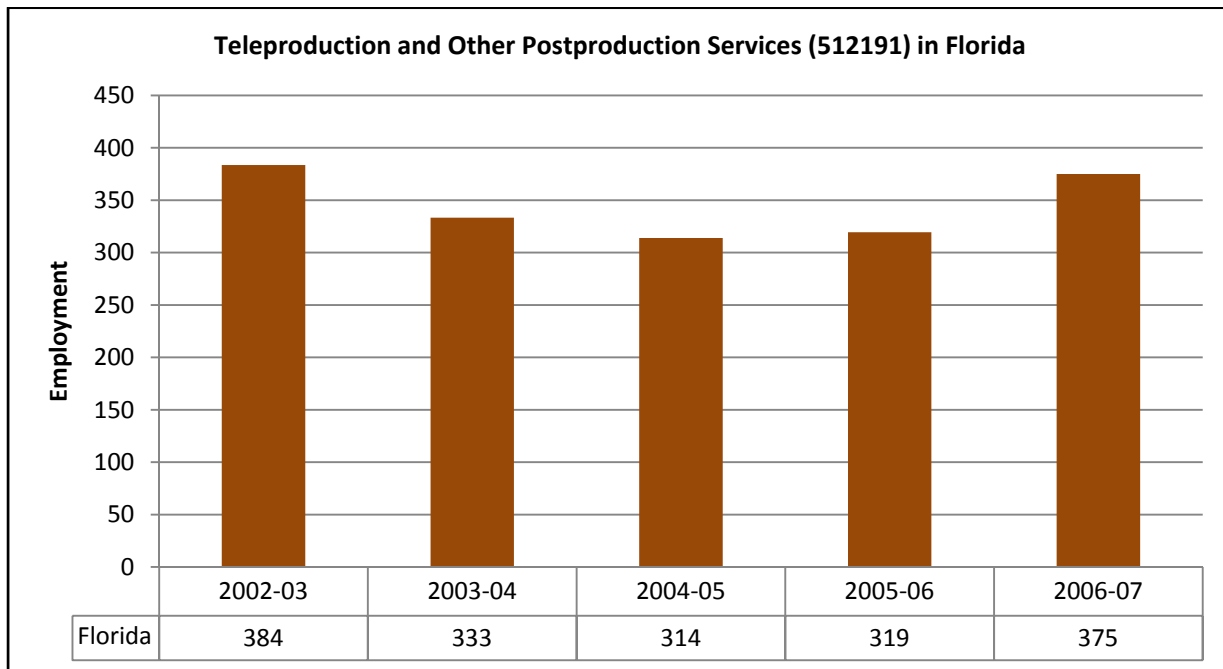
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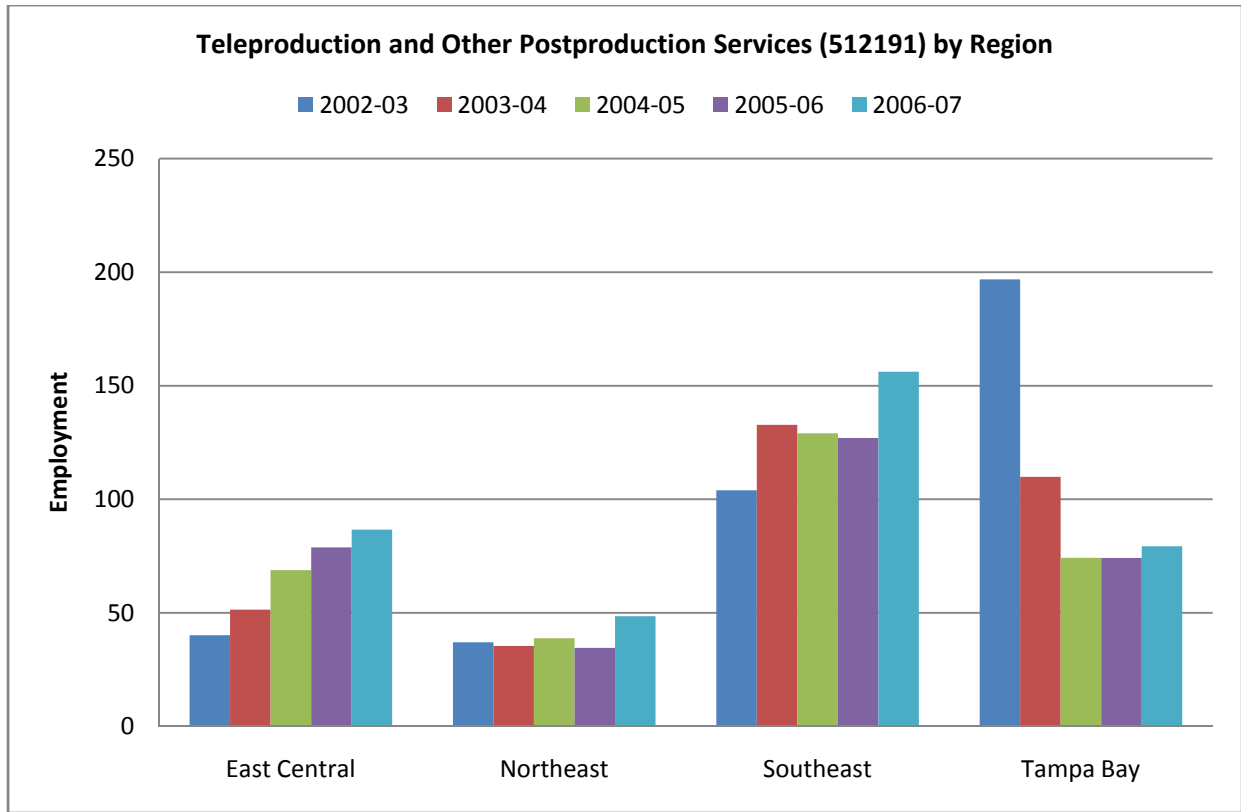
Source: Agency for Workforce Innovation. Employment data suppressed for Lake, Leon, Orange, Palm Beach, Seminole, and St. Johns counties.

512191 Teleproduction and Other Postproduction Services

This U.S. industry comprises establishments primarily engaged in providing specialized motion picture or video postproduction services, such as editing, film/tape transfers, subtitling, credits, closed captioning, and animation and special effects. After declining for several years, employment in this industry is nearing 2002 levels, with much of the re-growth happening in the Northeast and Southeast regions.

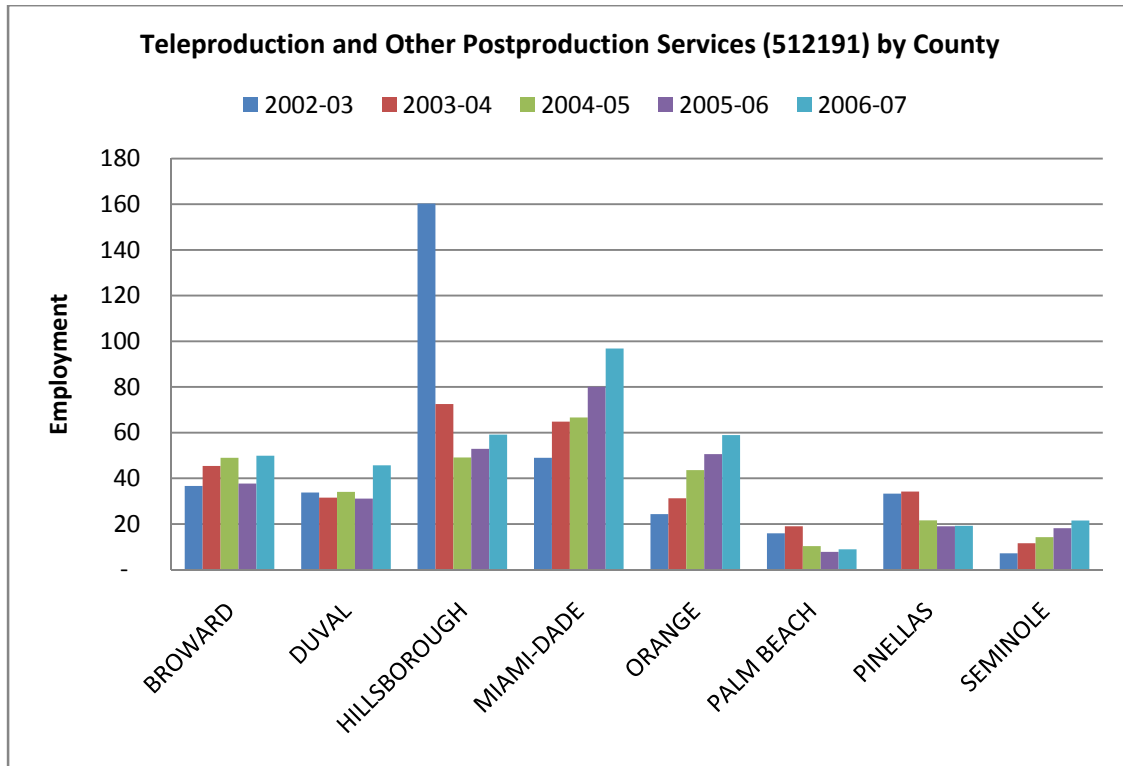


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments								
Florida	328	369	396	424	432	32%	0.48	0.41



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	40	51	69	79	87
Northeast	37	35	39	35	49
Southeast	104	133	129	127	156
Tampa Bay	197	110	74	74	79
Florida	384	333	314	319	375

	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	73	89	97	94	96	32%	0.33	0.53
Northeast	27	42	45	48	44	63%	0.16	0.79
Southwest	10	10	8	8	10	0%	NA	NA
Southeast	162	176	201	216	218	35%	0.52	0.50
Tampa Bay	55	49	45	58	64	16%	1.00	0.38



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
BROWARD	37	45	49	38	50
DUVAL	34	32	34	31	46
HILLSBOROUGH	160	73	49	53	59
MIAMI-DADE	49	65	67	80	97
ORANGE	24	31	44	51	59
PALM BEACH	16	19	10	8	9
PINELLAS	33	34	22	19	19
SEMINOLE	7	12	14	18	22

Establishments	Growth					2002 to 2007	2002 Location Quotient	2007 Location Quotient
	2002-03	2003-04	2004-05	2005-06	2006-07			
BREVARD	4	4	4	6	8	100%	0.40	0.05
BROWARD	50	59	65	70	81	62%	0.69	0.54
CLAY	5	10	8	4	4	-20%	0.52	0.15
COLLIER	0	1	4	4	6	NC	0.00	0.07
DUVAL	18	28	33	40	36	100%	0.15	0.73
FLAGLER	4	4	4	4	4	0%	0.43	8.65
HILLSBOROUGH	22	13	16	26	32	45%	2.50	0.80

LAKE	10	10	10	6	4	-60%	0.16	0.08
LEE	10	9	4	4	4	-60%	0.10	0.04
MANATEE	5	6	4	5	0	-100%	0.05	0.04
MIAMI-DADE	88	91	102	114	107	22%	0.67	0.78
MONROE	4	4	4	4	4	0%	0.16	0.12
ORANGE	35	38	50	50	48	37%	0.40	0.81
PALM BEACH	18	20	30	28	26	44%	0.20	0.12
PASCO	2	4	4	4	4	100%	0.00	0.05
PINELLAS	22	23	20	23	21	-5%	0.37	0.39
SEMINOLE	21	33	29	28	32	52%	0.47	1.00

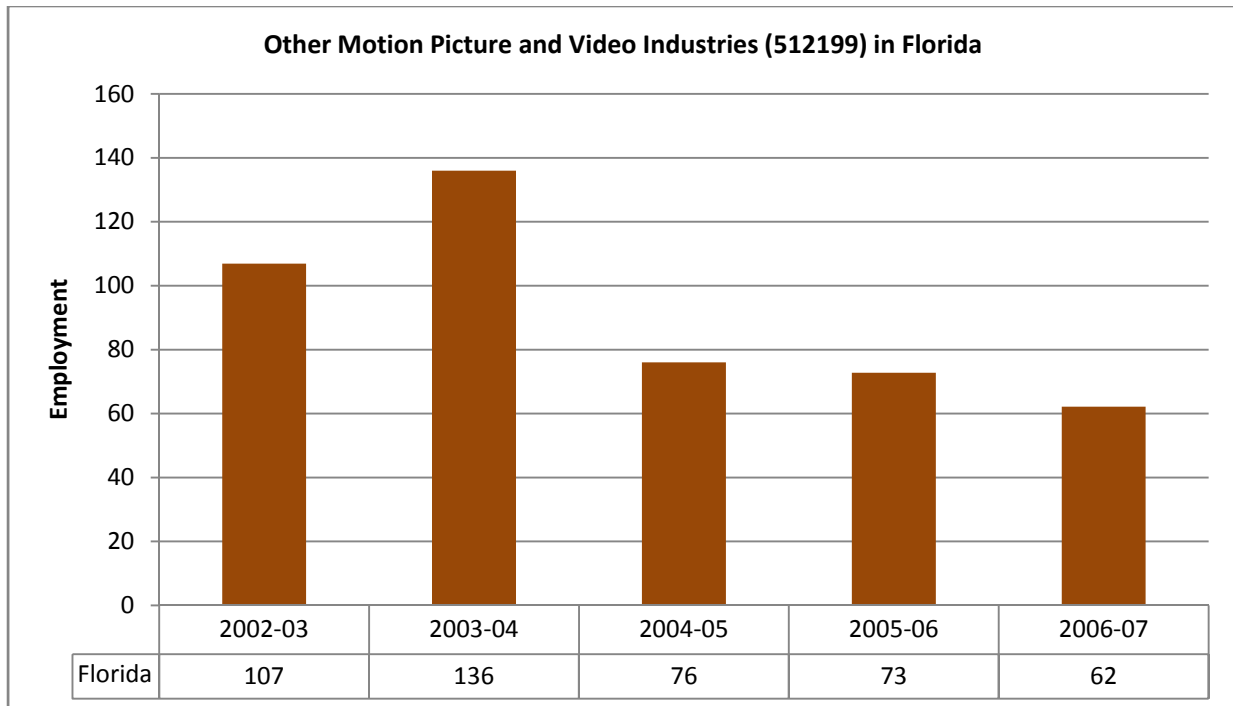
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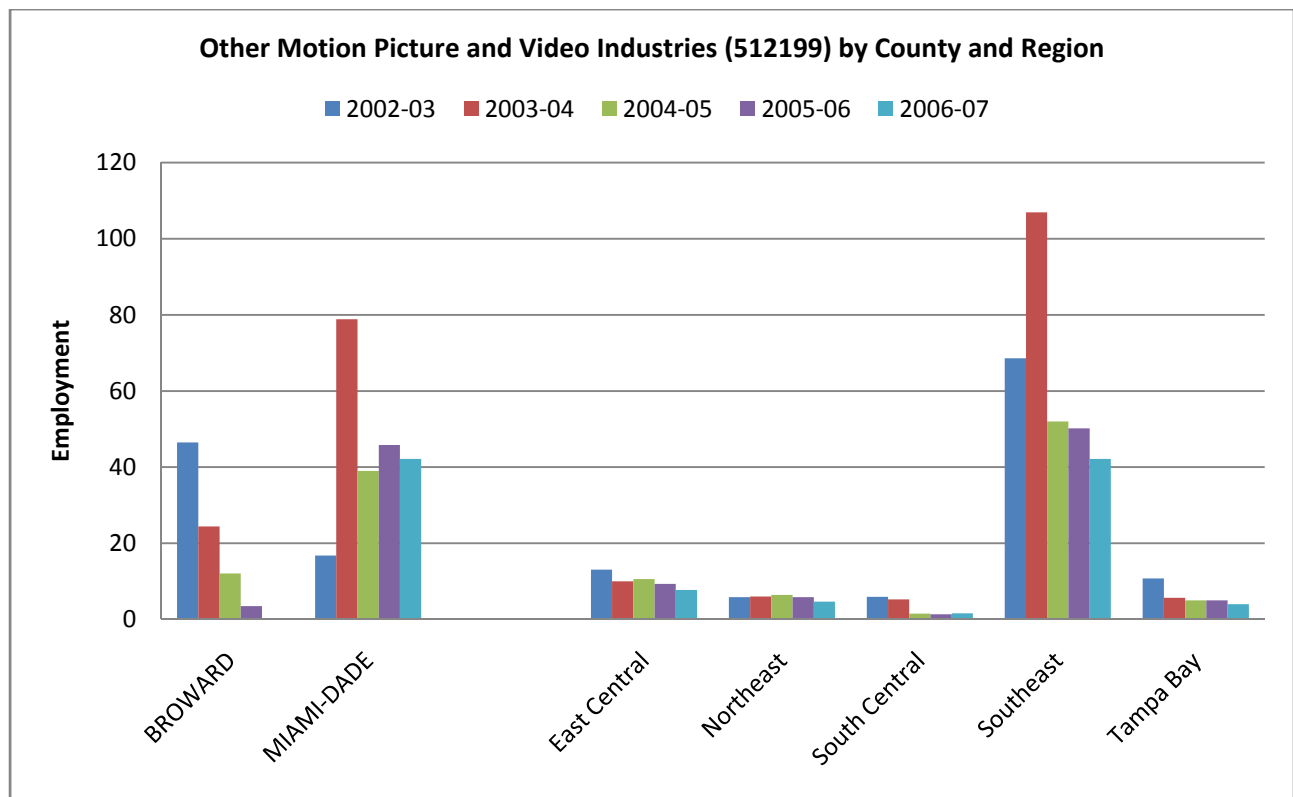
Source: Agency for Workforce Innovation. Employment data suppressed for Brevard Clay, Collier, Flagler, Lake, Lee, Leon, Manatee, Monroe, Pasco, Polk, and Volusia counties.

512199 Other Motion Picture and Video Industries

This U.S. industry comprises establishments primarily engaged in providing motion picture and video services (except motion picture and video production, distribution, exhibition, and teleproduction and other postproduction services). This industry represents a very small portion of the overall Film and Entertainment Industry in Florida and most of the employment in this industry is in the Southeast Region.



	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	136	139	134	132	118	-13.2%	0.31	0.29



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
BROWARD	47	24	12	4	0
MIAMI-DADE	17	79	39	46	42
East Central	13	10	11	9	8
Northeast	6	6	6	6	5
South Central	6	5	2	1	2
Southeast	69	107	52	50	42
Tampa Bay	11	6	5	5	4

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	31	26	23	20	22	-29.0%	0.34	0.23
Northeast	13	12	14	14	12	-7.7%	NA	NA
South Central	4	4	4	4	4	0.0%	NA	NA
Southwest	8	8	9	14	15	87.5%	NA	NA
Southeast	53	64	64	66	53	0.0%	0.32	0.61
Tampa Bay	27	25	20	14	12	-55.6%	0.35	0.15

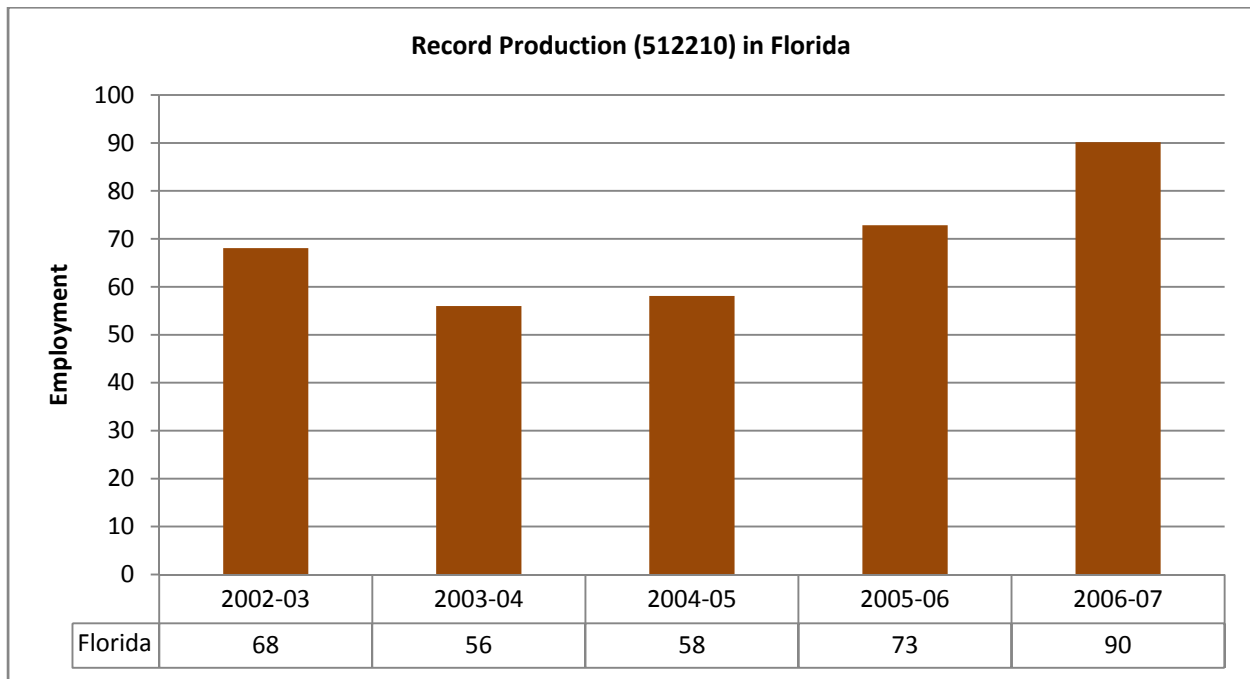
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
BROWARD	12	13	10	8	0	-100%	0.66	0.02
COLLIER	4	4	0	0	4	0%	0.36	0.11
DUVAL	9	8	10	10	8	-11%	0.39	0.06
HARDEE	4	4	4	4	4	0%	9.21	1.85
HILLSBOROUGH	4	4	6	8	8	100%	0.04	0.39
LEE	4	0	5	11	11	175%	0.81	0.15
MIAMI-DADE	33	42	49	54	46	39%	0.30	1.48
ORANGE	18	17	15	12	14	-22%	0.02	0.13
OSCEOLA	4	7	8	6	4	0%	0.80	0.46
PALM BEACH	4	7	5	4	0	-100%	0.03	0.07
PINELLAS	11	10	0	0	0	-100%	0.84	0
POLK	4	4	4	4	4	0%	0.08	0.12
SEMINOLE	8	2	0	2	4	-50%	0.18	1.15

NA = Not Available

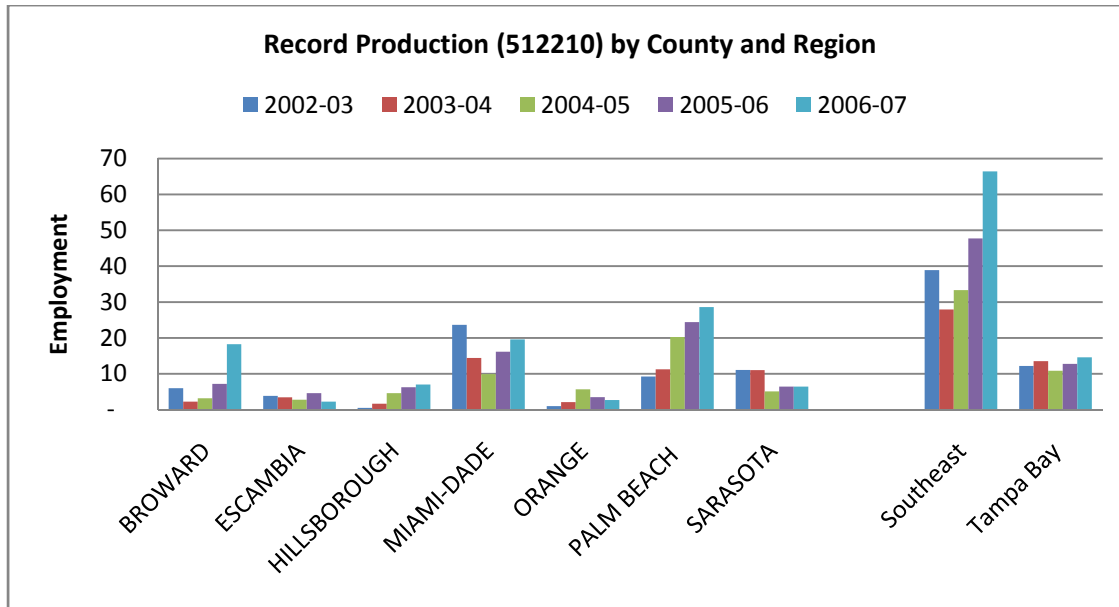
Source: Agency for Workforce Innovation. Employment data suppressed for Collier, Duval, Hardee, Hillsborough, Lee, Orange, Pasco, Pinellas, Polk, Putnam, Sarasota, Seminole, St. Johns and St. Lucie counties.

512210 Record Production

This industry comprises establishments primarily engaged in record production (e.g., tapes, CDs). These establishments contract with artists and arrange and finance the production of original master recordings. Establishments in this industry hold the copyright to the master recording and derive most of their revenues from the sales, leasing, and licensing of master recordings. Establishments in this industry do not have their own duplication or distribution capabilities. It is a small industry in Florida and located almost exclusively in the Southeast Region.



	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	111	121	171	180	222	100%	0.48	0.69
Florida	111	121	171	180	222	100%	0.48	0.69



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
BROWARD	6	2	3	7	18
ESCAMBIA	4	3	3	5	2
HILLSBOROUGH	1	2	5	6	7
MIAMI-DADE	24	14	10	16	20
ORANGE	1	2	6	4	3
PALM BEACH	9	11	20	24	29
SARASOTA	11	11	5	6	6
Southeast	39	28	33	48	66
Tampa Bay	12	14	11	13	15

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	12	14	17	20	25	108%	0.46	0.19
Northeast	0	0	0	1	4	NC	NA	NA
Northwest	8	6	5	8	7	-13%	1.73	0.52
Southwest	12	12	9	8	11	-8%	NA	NA
Southeast	65	70	102	114	148	128%	0.63	1.3
Tampa Bay	14	18	35	29	27	93%	NA	0.58

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
BROWARD	15	14	16	19	26	73%	0.79	0.89
COLLIER	8	8	4	4	7	-13%	1.81	0.97
ESCAMBIA	4	4	4	4	4	0%	1.83	1.38
HILLSBOROUGH	2	2	6	8	8	300%	0.03	0.55
LEE	4	4	4	4	4	0%	0.09	0.61
MIAMI-DADE	38	41	62	70	83	118%	0.90	0.76
ORANGE	4	8	12	16	19	375%	0.66	0.06
PALM BEACH	12	15	24	25	39	225%	0.13	3.32
PINELLAS	4	4	13	0	0	-100%	0.18	0.73
SARASOTA	8	9	12	9	10	25%	0.67	1.65
SEMINOLE	4	4	5	0	0	-100%	1.80	1.11

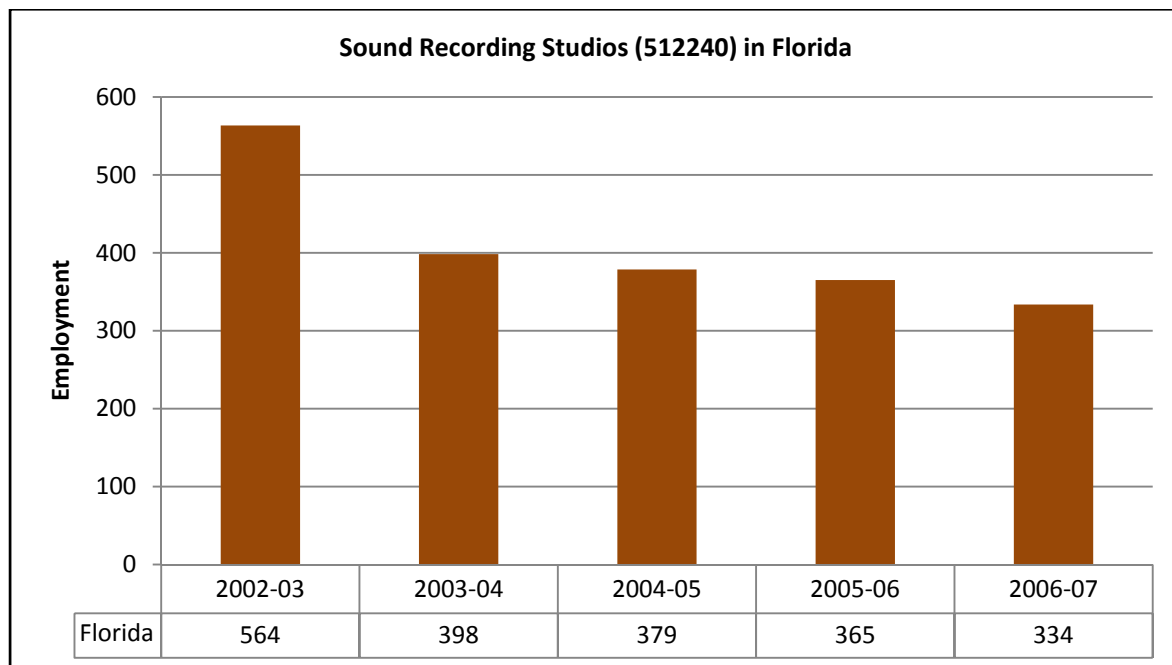
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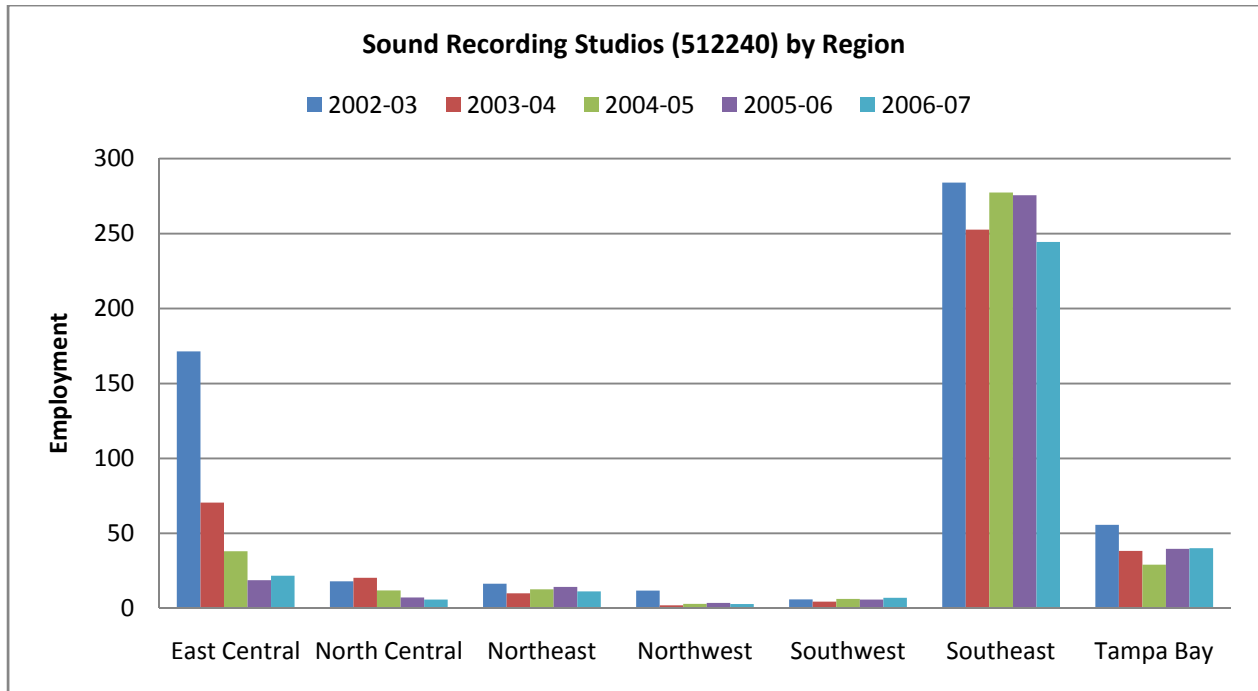
Source: Agency for Workforce Innovation. Employment data suppressed for Brevard, Charlotte, Collier, Duval, Lee, Pinellas, Santa Rosa, Seminole, and Walton counties.

512240 Sound Recording Studios

This industry comprises establishments primarily engaged in providing the facilities and technical expertise for sound recording in a studio. This industry includes establishments that provide audio production and postproduction services to produce master recordings. These establishments may provide audio services for film, television, and video productions. Employment in this industry has been declining since 2002 and the number of establishments is shrinking as well. The East Central Region has been hardest hit with employment declining from 171 in 2002 to just 22 in 2007.

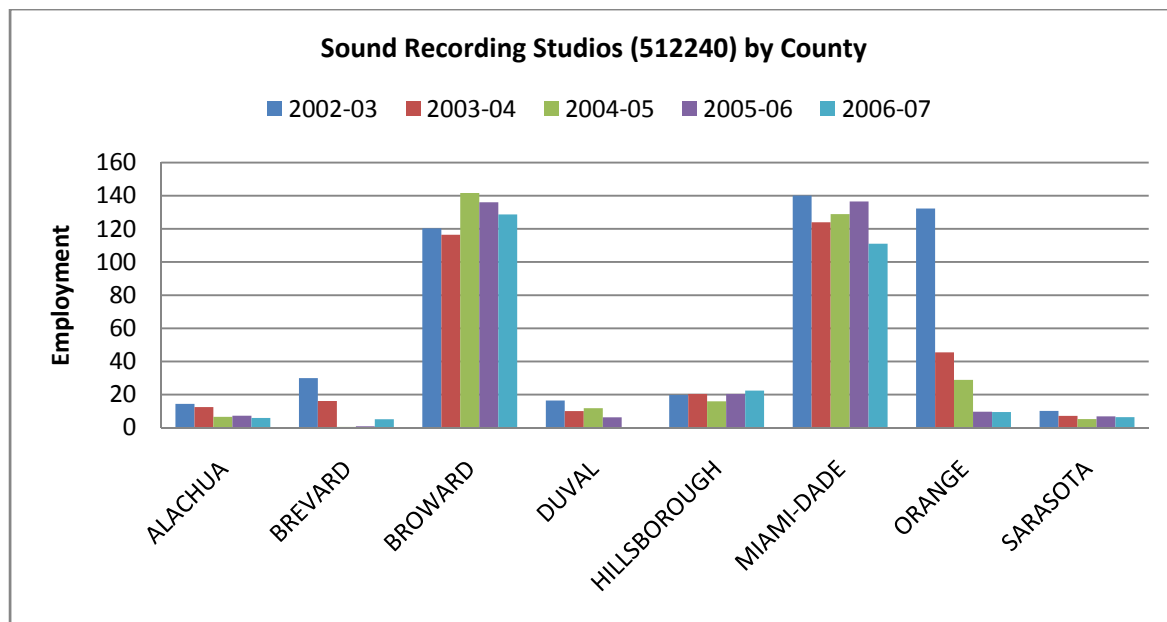


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	429	388	371	379	387	-10%	1.05	0.69



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	171	71	38	19	22
North Central	18	20	12	7	6
Northeast	16	10	13	14	11
Northwest	12	2	3	4	3
Southwest	6	5	6	6	7
Southeast	284	253	277	276	244
Tampa Bay	56	38	29	40	40

	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	72	62	63	65	69	-4%	1.45	0.43
East Central	16	17	12	9	8	-50%	0.89	0.72
North Central	16	10	10	15	16	0%	0.47	0.62
Northeast	12	4	6	8	8	-33%	96	0.34
Northwest	12	12	15	17	17	42%	1.13	0.28
Southwest	214	202	192	182	186	-13%	1.42	1.15
Southeast	87	81	73	83	83	-5%	0.51	0.48
Tampa Bay								



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	14	12	7	7	6
BREVARD	30	16	1	1	5
BROWARD	120	116	142	136	129
DUVAL	16	10	12	6	0
HILLSBOROUGH	20	20	16	20	22
MIAMI-DADE	140	124	129	137	111
ORANGE	132	46	29	10	10
SARASOTA	10	7	5	7	6

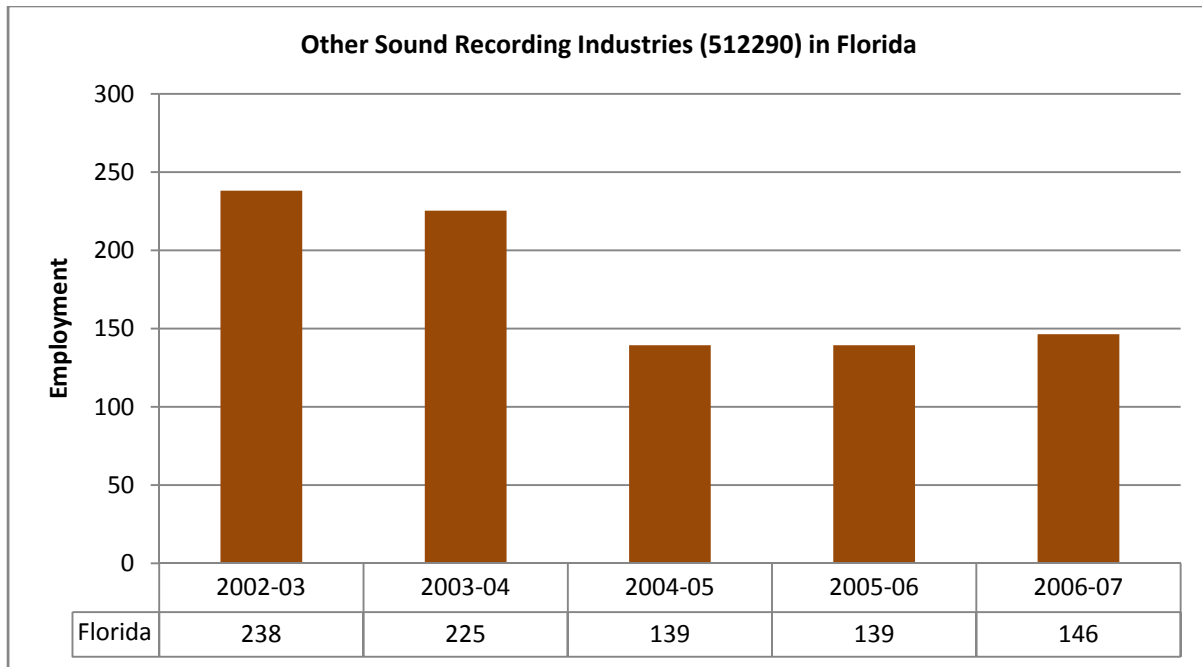
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	12	10	8	9	8	-33.3%	1.90	1.46
BREVARD	6	2	2	8	15	150.0%	1.20	0.64
BROWARD	76	67	64	68	80	5.3%	2.03	2.06
CLAY	0	0	2	6	8	NC	0.47	1.16
DUVAL	16	10	8	6	4	-75.0%	0.55	0.67
HILLSBOROUGH	26	30	35	42	42	61.5%	0.45	0.51
LEE	8	8	11	15	17	112.5%	0.85	0.49
MANATEE	8	6	4	6	8	0.0%	0.32	0.70
MARTIN	8	6	1	0	0	-100.0%	1.17	0
MIAMI-DADE	114	119	106	99	90	-21.1%	1.80	1.25
OKALOOSA	6	4	4	4	4	-33.3%	0.32	0.47

ORANGE	23	21	24	23	28	21.7%	2.26	0.26
OSCEOLA	7	7	4	4	4	-42.9%	0.75	0.53
PALM BEACH	16	10	21	15	16	0.0%	0.25	0.18
PINELLAS	32	31	21	17	14	-56.3%	0.51	0.42
POLK	0	0	0	8	8	NC	0.22	0.73
SARASOTA	16	11	8	8	8	-50.0%	0.69	0.34
SEMINOLE	22	23	33	30	22	0.0%	0.38	1.09
VOLUSIA	14	9	0	0	0	-100.0%	0.59	0

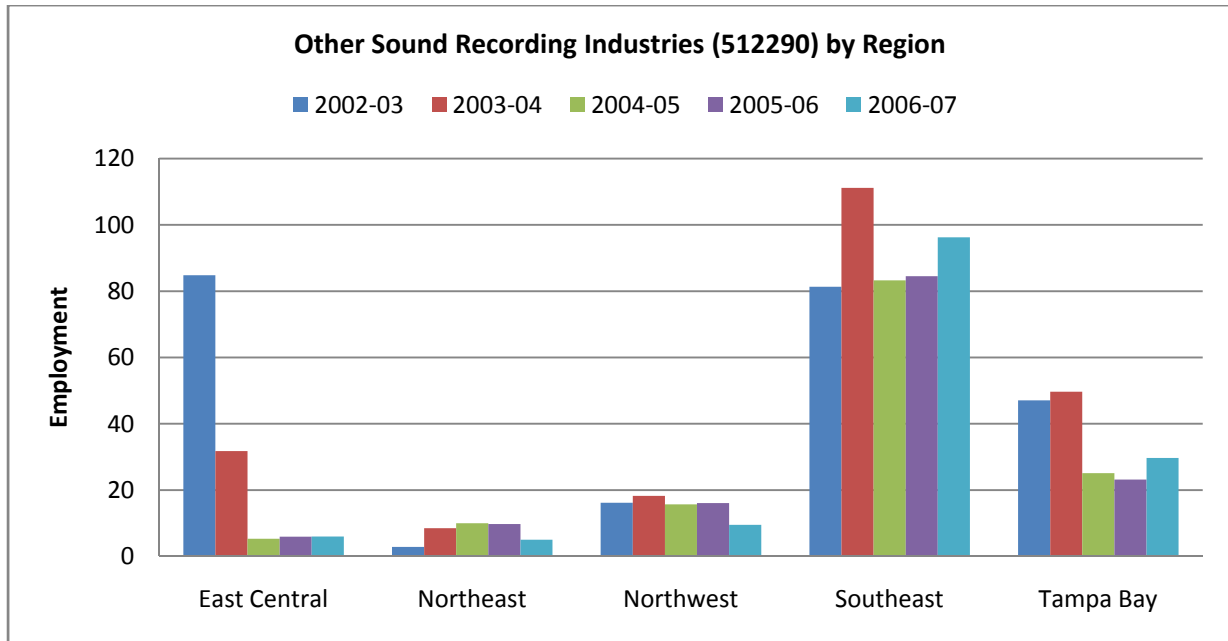
Source: Agency for Workforce Innovation. Employment data suppressed Charlotte, Clay, Citrus, Escambia, Lee, Leon, Madison, Manatee, Marion, Martin, Okaloosa, Osceola, Palm Beach, Pasco, Pinellas, Polk, Seminole, St. Johns, and Volusia counties.

512290 Other Sound Recording Industries

This industry comprises establishments primarily engaged in providing sound recording services (except record production, distribution, music publishing, and sound recording in a studio). Establishments in this industry provide services, such as the audio recording of meetings and conferences. This is another small sector within the overall industry, with a presence mostly felt in regions with major metropolitan areas.

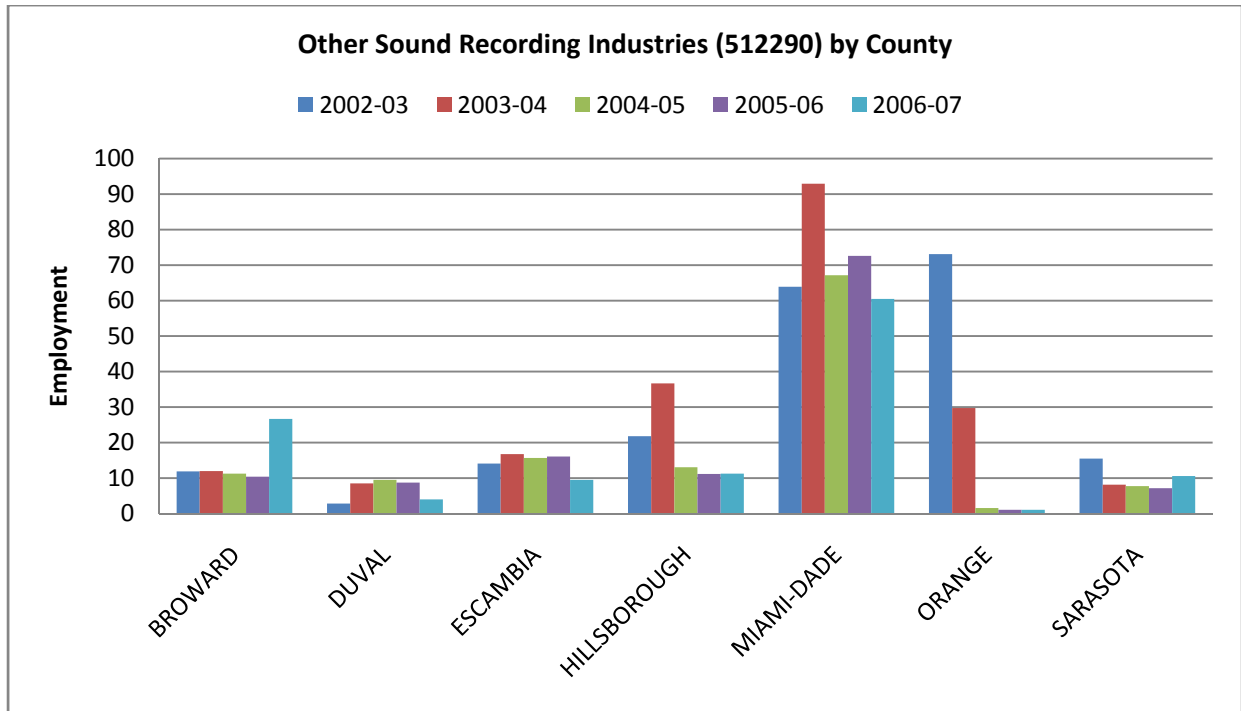


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	193	201	193	150	137	-29%	0.74	0.70



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	85	32	5	6	6
Northeast	3	9	10	10	5
Northwest	16	18	16	16	10
Southeast	81	111	83	85	96
Tampa Bay	47	50	25	23	30

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	51	36	31	24	26	-49%	1.83	0.40
Northeast	5	8	12	13	10	100%	0.54	0.62
Northwest	10	12	8	8	6	-40%	NA	0.74
Southeast	99	114	117	82	73	-26%	0.64	1.11
Tampa Bay	26	27	21	21	22	-15%	0.69	0.63



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
BROWARD	12	12	11	10	27
DUVAL	3	9	10	9	4
ESCAMBIA	14	17	16	16	10
HILLSBOROUGH	22	37	13	11	11
MIAMI-DADE	64	93	67	73	61
ORANGE	73	30	2	1	1
SARASOTA	16	8	8	7	11

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
BROWARD	13	22	29	24	25	92%	0.25	0.98
DUVAL	5	8	10	9	6	20%	0.66	0.76
ESCAMBIA	6	8	8	8	6	0%	0.43	2.24
HILLSBOROUGH	4	10	8	9	8	100%	0.83	0.92
MARTIN	4	4	4	4	4	0%	0.23	1.82
MIAMI-DADE	70	76	74	48	36	-49%	1.05	1.78
ORANGE	27	22	18	12	14	-48%	3.35	0.28
OSCEOLA	8	8	5	4	4	-50%	0.12	1.19
PALM BEACH	8	8	6	0	6	-33%	0.31	0.24
PINELLAS	12	12	9	8	8	-33%	0.38	0.53
SARASOTA	8	5	4	4	6	-25%	2.57	1.66
SEMINOLE	14	6	4	4	4	-71%	1.58	0.38
ST JOHNS	0	0	2	4	4	NC	0.18	0.69
ST LUCIE	4	4	4	2	0	-100%	2.50	0.25

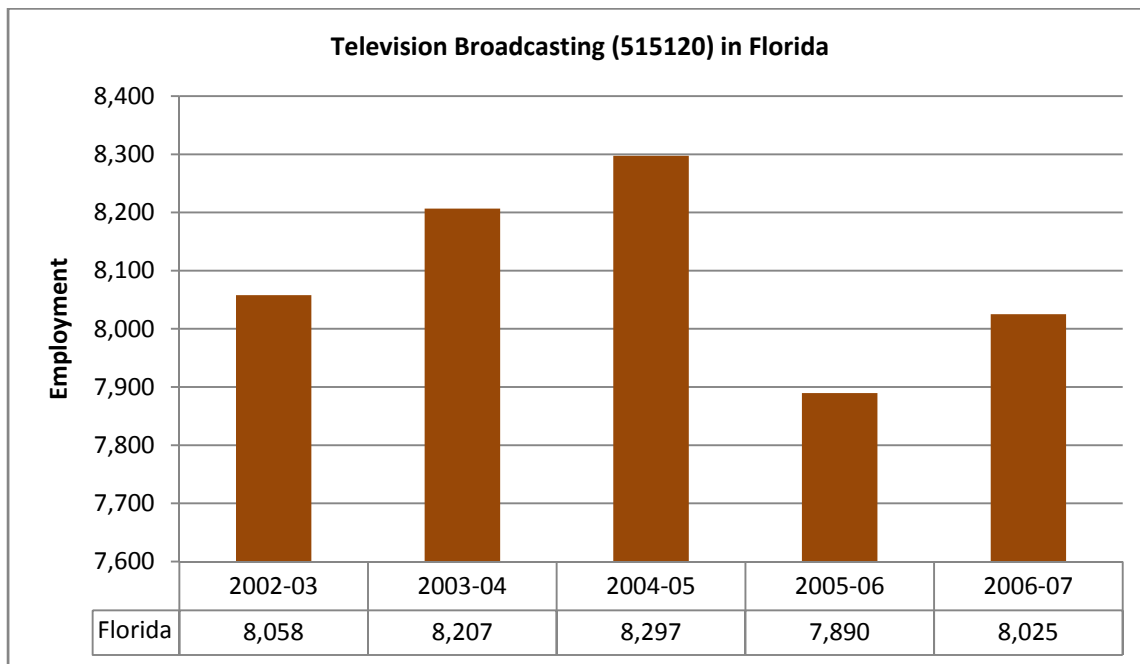
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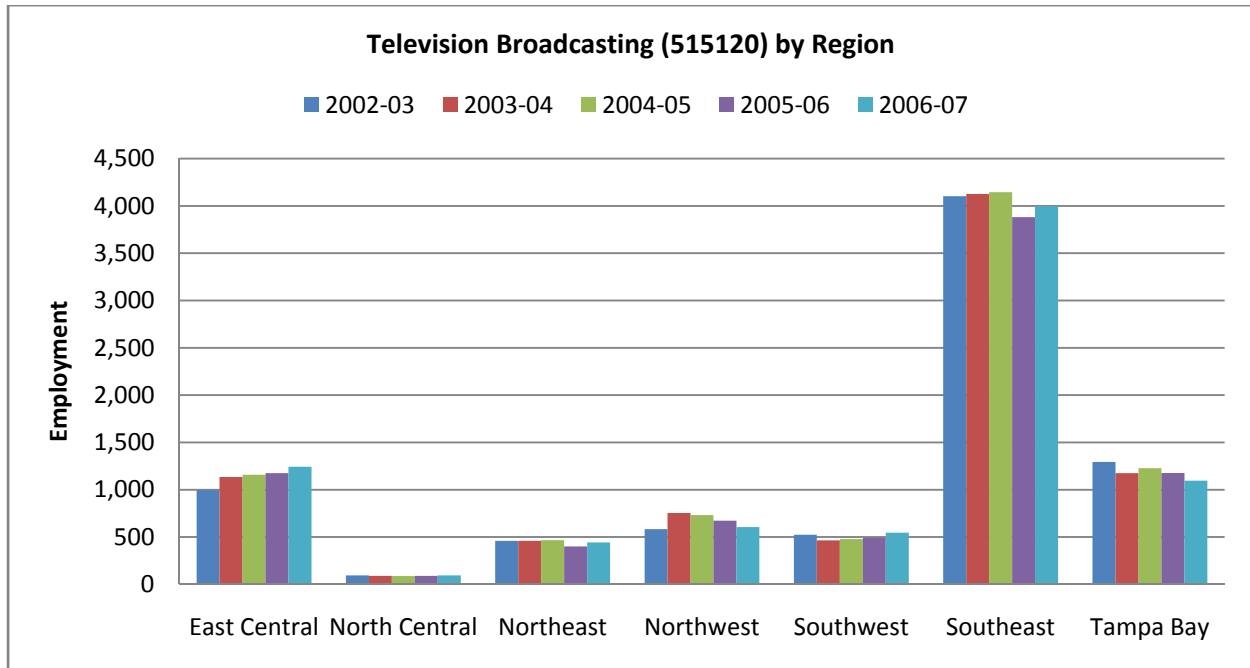
Source: Agency for Workforce Innovation. Employment data suppressed for Bay, Brevard, Lee, Leon, Martin, Monroe, Osceola, Palm Beach, Pasco, Pinellas, Seminole, St. Johns and St. Lucie counties.

515120 Television Broadcasting

This industry comprises establishments primarily engaged in broadcasting images together with sound. These establishments operate television broadcasting studios and facilities for the programming and transmission of programs to the public. These establishments also produce or transmit visual programming to affiliated broadcast television stations, which in turn broadcast the programs to the public on a predetermined schedule. Programming may originate in their own studio, from an affiliated network, or from external sources. Employment in this industry has remained relatively stable in Florida, with the Tampa Bay, East Central and Southeast regions housing the majority of workers.

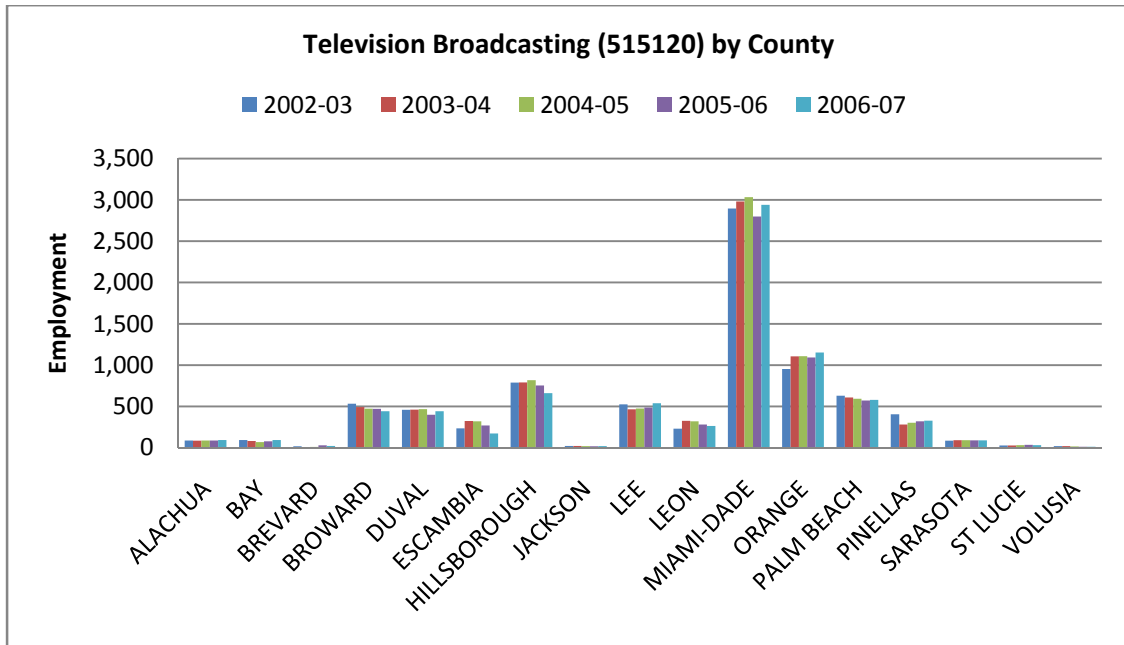


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	571	564	602	668	697	22%	1.14	1.12
Florida								



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	997	1,135	1,158	1,175	1,242
North Central	95	90	89	89	95
Northeast	459	461	467	401	443
Northwest	584	754	733	674	605
Southwest	525	465	479	493	546
Southeast	4,103	4,126	4,144	3,881	3,997
Tampa Bay	1,294	1,176	1,228	1,178	1,097

Establishments	2002-	2003-	2004-	2005-	2006-	Growth	2002	2007
	03	04	05	06	07	2002 to 2007	Location Quotient	Location Quotient
East Central	83	78	75	77	85	2%	0.75	0.99
North Central	12	10	10	13	12	0%	0.39	0.69
Northeast	22	20	21	20	22	0%	0.77	0.90
Northwest	62	62	62	67	78	26%	0.26	1.09
Southwest	26	20	22	24	25	-4%	1.55	1.32
Southeast	271	287	308	342	343	27%	1.82	1.60
Tampa Bay	91	86	104	125	132	45%	0.91	0.69



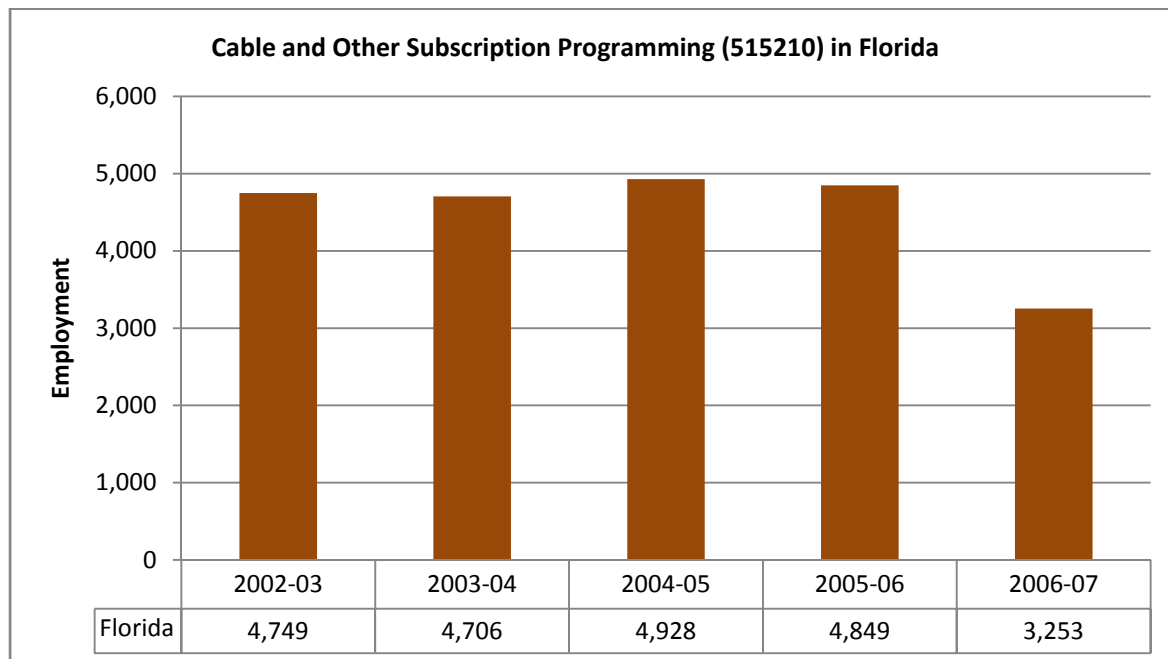
Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	86	85	88	88	93
BAY	94	81	69	77	92
BREVARD	18	1	9	29	22
BROWARD	532	492	473	471	442
DUVAL	459	460	466	400	442
ESCAMBIA	235	323	320	269	173
HILLSBOROUGH	789	790	817	753	661
JACKSON	22	21	20	18	19
LEE	525	465	475	486	538
LEON	231	325	320	280	264
MIAMI-DADE	2,896	2,980	3,033	2,799	2,940
ORANGE	954	1,105	1,109	1,092	1,152
PALM BEACH	629	607	593	572	580
PINELLAS	405	280	303	319	327
SARASOTA	85	90	92	90	90
ST LUCIE	27	27	31	35	32
VOLUSIA	19	19	16	11	11

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	4	4	6	8	8	100%	0.71	1.68
BAY	12	8	10	12	15	25%	0.34	1.30
BREVARD	6	4	6	12	12	100%	0.47	0.09
BROWARD	52	52	63	66	68	31%	0.88	0.55
DUVAL	18	16	16	15	20	11%	1.00	1.20
ESCAMBIA	17	16	14	13	14	-18%	0.17	1.18
GADSDEN	1	4	4	6	8	700%	0.00	2.34
HILLSBOROUGH	41	39	45	50	51	24%	1.37	1.18
JACKSON	4	4	4	4	4	0%	2.55	0.73
LEE	26	20	20	20	21	-19%	3.00	2.38
LEON	24	26	26	28	29	21%	0.36	2.09
MANATEE	4	4	4	6	8	100%	0.20	0.06
MARION	8	6	4	5	0	-100%	0.05	0.03
MARTIN	8	8	7	4	0	-100%	0.04	0.01
MIAMI-DADE	132	154	170	194	194	47%	2.84	2.99
MONROE	8	8	5	2	2	-75%	0.33	0.12
ORANGE	47	47	42	34	39	-17%	1.40	1.88
PALM BEACH	67	61	57	68	69	3%	1.63	1.08
PASCO	4	4	4	8	8	100%	0.07	0.26
PINELLAS	34	33	45	54	57	68%	1.36	0.89
SARASOTA	8	6	4	4	4	-50%	0.35	0.28
SEMINOLE	8	8	11	15	15	88%	0.03	0.54
ST JOHNS	4	4	4	5	2	-50%	0.18	0.02
ST LUCIE	4	4	6	8	8	100%	1.30	0.13
VOLUSIA	22	19	16	16	18	-18%	0.01	0.08
WALTON	4	4	4	4	4	0%	0.55	0.75

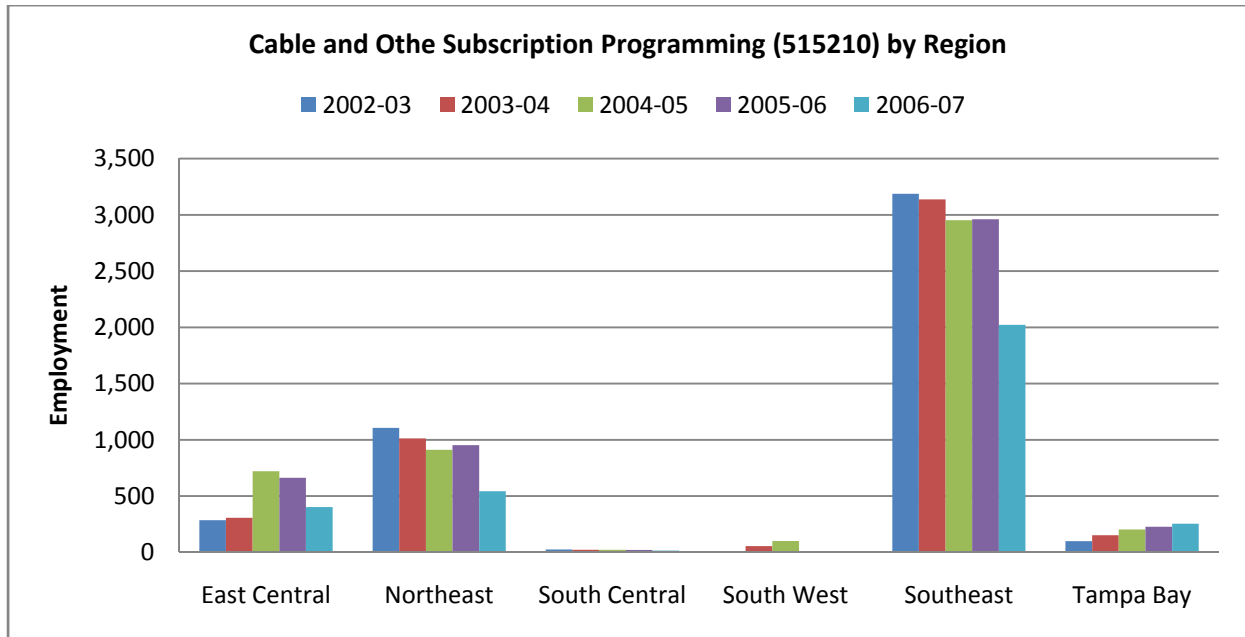
Source: Agency for Workforce Innovation. Employment data suppressed for Charlotte, Citrus, Clay, Columbia, Gadsden, Franklin, Highlands, Lake, Manatee, Marion, Martin, Monroe, Pasco, Seminole, St. Johns, and Walton counties.

515210 Cable and Other Subscription Programming

This industry comprises establishments primarily engaged in operating studios and facilities for the broadcasting of programs on a subscription or fee basis. The broadcast programming is typically narrowcast in nature (e.g., limited format, such as news, sports, education, or youth-oriented). These establishments produce programming in their own facilities or acquire programming from external sources. The programming material is usually delivered to a third party, such as cable systems or direct-to-home satellite systems, for transmission to viewers. Employment within this industry declined sharply in Florida between 2005 and 2007, with nearly all regions losing jobs and the Southeast region losing over 900 jobs. Only the Tampa Bay region showed a slight increase in employment.



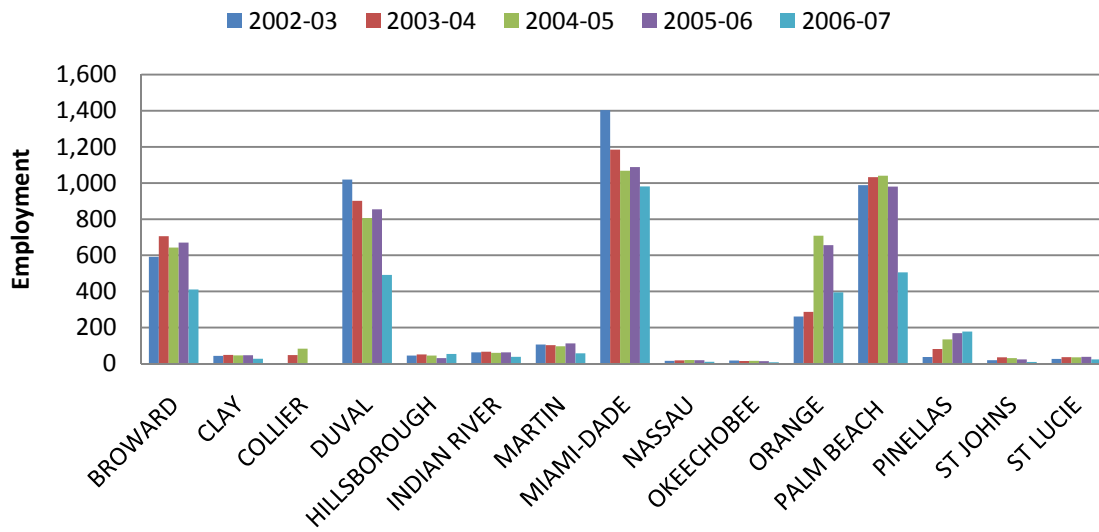
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Florida	515	527	525	466	357	-31%	1.05	0.71



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	286	307	722	663	403
Northeast	1,106	1,012	911	953	544
South Central	26	22	23	21	17
South West	7	55	101	4	1
Southeast	3,187	3,137	2,952	2,961	2,022
Tampa Bay	100	152	204	228	255

Establishments						Growth	2002	2007
	2002-03	2003-04	2004-05	2005-06	2006-07	2002 to 2007	Location Quotient	Location Quotient
East Central	45	46	48	37	32	-29%	0.67	0.57
North Central	6	4	4	4	3	-50%	0.14	0.06
Northeast	78	72	70	63	31	-60%	2.11	1.34
Northwest	28	20	14	17	11	-61%	1.02	0.04
South Central	12	10	8	8	9	-25%	1.07	0.90
Southwest	11	17	20	16	10	-9%	0.20	0.16
Southeast	249	260	277	257	203	-18%	1.77	1.27
Tampa Bay	86	98	84	64	58	-33%	0.25	0.24

Cable and Other Subscription Programming (515210) by County



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
BROWARD	592	706	643	670	411
CLAY	44	49	46	47	27
COLLIER	2	48	84	2	0
DUVAL	1,019	901	806	855	491
HILLSBOROUGH	45	52	45	31	54
INDIAN RIVER	63	66	60	63	38
MARTIN	106	102	97	113	58
MIAMI-DADE	1,403	1,185	1,068	1,088	981
NASSAU	16	19	20	20	11
OKEECHOBEE	18	15	16	14	8
ORANGE	261	287	709	656	395
PALM BEACH	989	1,032	1,040	980	506
PINELLAS	37	82	135	170	178
ST JOHNS	20	35	31	24	10
ST LUCIE	27	36	35	38	24

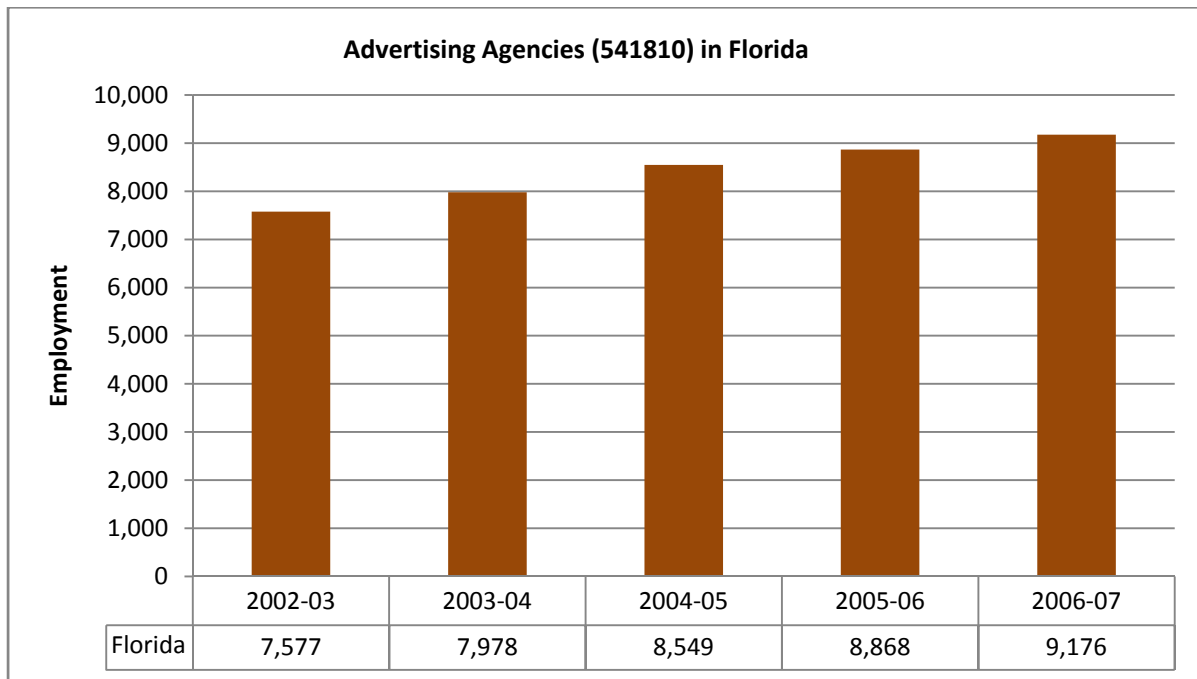
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
BREVARD	8	4	2	0	0	-100%	0.14	0.00
BROWARD	55	70	79	72	51	-7%	1.30	1.01
CITRUS	4	4	4	4	3	-25%	4.41	1.10
CLAY	4	4	4	4	2	-50%	4.52	2.50
COLLIER	4	10	12	9	8	100%	0.51	0.36
DUVAL	46	40	38	34	18	-61%	2.08	1.23
ESCAMBIA	10	8	6	12	10	0%	1.90	0.06
HENDRY	4	4	4	4	3	-25%	1.27	1.49
HILLSBOROUGH	50	60	45	36	35	-30%	0.12	0.13
INDIAN RIVER	5	6	8	8	5	0%	0.75	2.24
LAKE	11	9	4	0	0	-100%	0.48	0.00
LEE	7	3	4	5	2	-71%	0.05	0.06
LEON	6	4	4	0	0	-100%	1.10	0.00
MARION	4	4	4	4	3	-25%	0.24	0.15
MARTIN	8	10	12	10	8	0%	3.37	1.83
MIAMI-DADE	104	96	96	85	72	-31%	2.05	1.39
MONROE	4	6	8	6	2	-50%	0.17	0.54
NASSAU	8	8	8	8	5	-38%	1.84	2.88
OKEECHOBEE	8	6	4	4	3	-63%	5.90	3.93
ORANGE	14	22	32	32	28	100%	1.15	1.12
PALM BEACH	65	64	66	67	58	-11%	2.05	1.26
PASCO	4	4	4	0	0	-100%	0.16	0.00
PINELLAS	20	20	18	12	12	-40%	0.23	0.41
POLK	0	2	4	4	4	NC	0.00	0.27
PUTNAM	4	4	4	4	2	-50%	0.93	1.02
SARASOTA	4	4	3	0	0	-100%	0.36	0.00
SEMINOLE	6	9	10	5	4	-33%	0.10	0.24
ST JOHNS	12	12	12	9	2	-83%	0.72	1.40
ST LUCIE	8	8	8	9	7	-13%	0.33	1.67

NC = Not Calculable

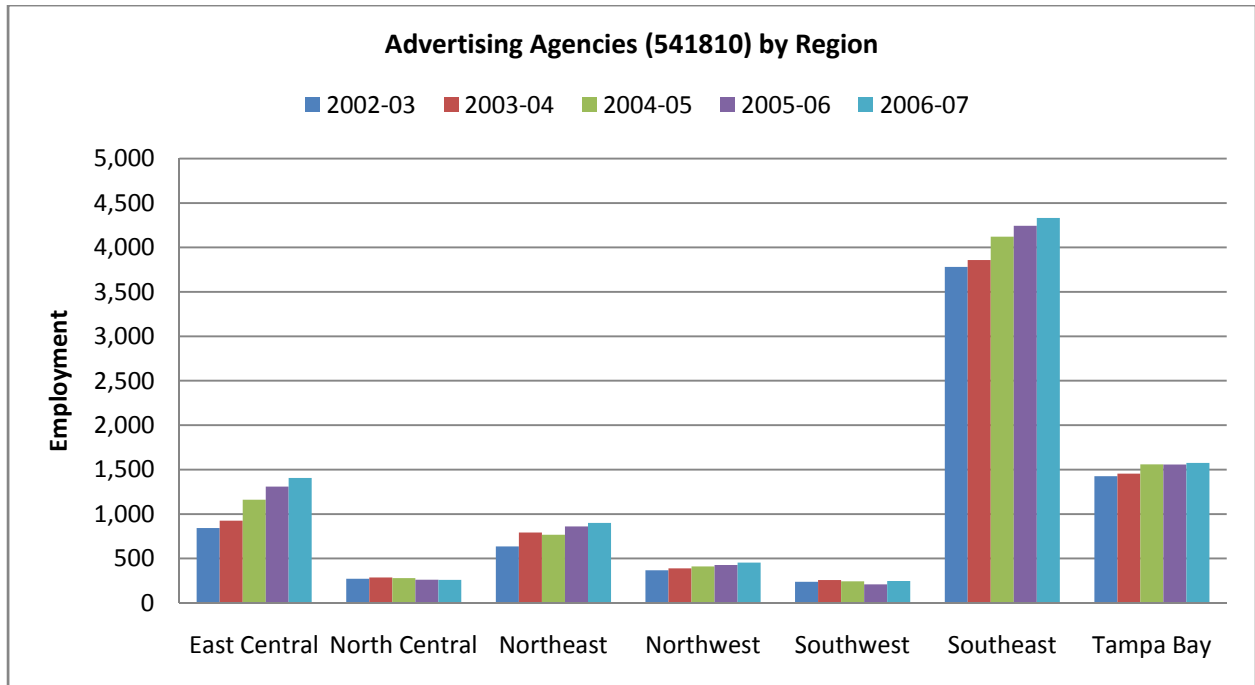
Source: Agency for Workforce Innovation. Employment data suppressed for Alachua, Baker, Bay, Brevard, Charlotte, Citrus, DeSoto, Escambia, Gulf, Hendry, Hernando, Lake, Lee, Leon, Manatee, Marion, Monroe, Pasco, Polk, Putnam, Santa Rosa, Sarasota, Seminole, St. Lucie, Sumter, Volusia, and Walton counties.

541810 Advertising Agencies

This industry comprises establishments primarily engaged in creating advertising campaigns and placing such advertising in periodicals, newspapers, radio and television, or other media. These establishments are organized to provide a full range of services (i.e., through in-house capabilities or subcontracting), including advice, creative services, account management, production of advertising material, media planning, and buying (i.e., placing advertising). Advertising is a growing industry in Florida and all regions saw steady employment growth between 2002 and 2007.

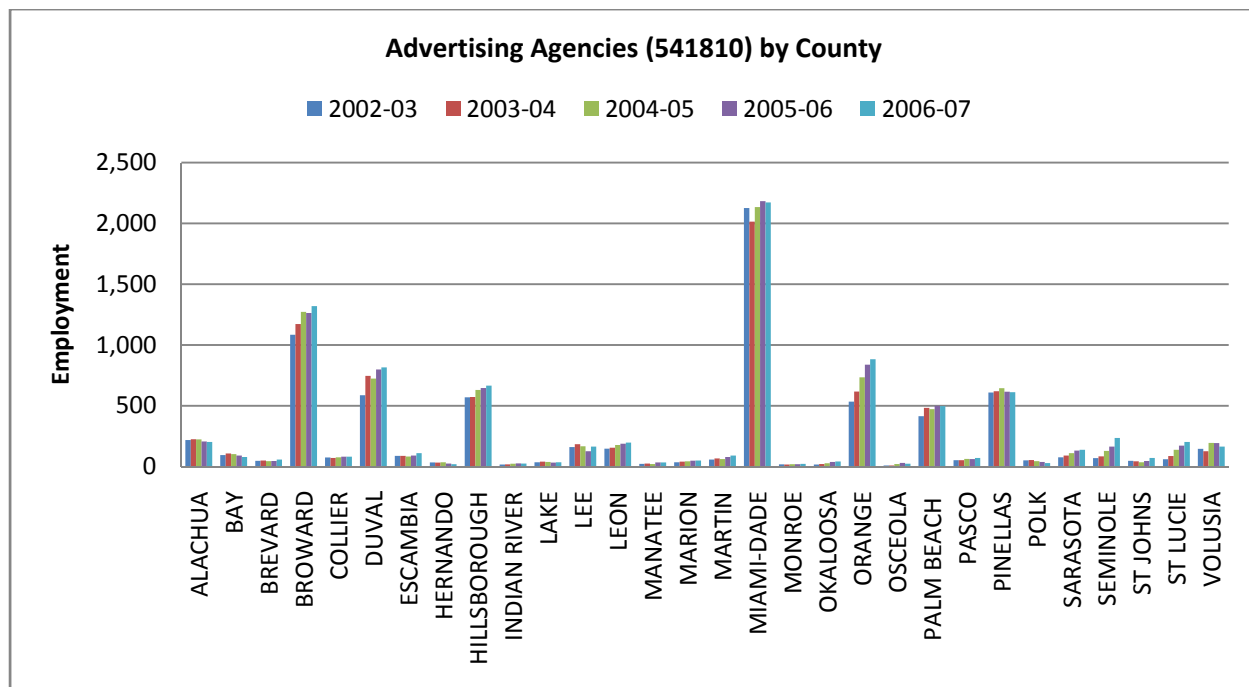


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	5,087	5,407	6,011	6,073	5,977	17%	0.77	0.95
Florida								



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	842	926	1,162	1,309	1,407
North Central	273	286	279	261	260
Northeast	636	792	767	860	900
Northwest	368	388	411	426	454
Southwest	238	258	243	208	247
Southeast	3,780	3,859	4,121	4,244	4,331
Tampa Bay	1,425	1,455	1,559	1,558	1,576

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	610	655	810	844	818	34%	0.54	0.81
North Central	114	122	141	151	157	38%	0.75	0.73
Northeast	257	262	298	319	343	33%	0.54	1.13
Northwest	271	286	323	313	332	23%	0.51	0.65
Southwest	247	262	300	313	338	37%	0.50	0.52
Southeast	2,476	2,630	2,882	2,904	2,774	12%	1.13	1.32
Tampa Bay	1,100	1,182	1,250	1,222	1,211	10%	0.67	0.73



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	218	225	224	207	202
BAY	95	107	103	91	79
BREVARD	47	50	45	46	58
BROWARD	1,085	1,172	1,273	1,263	1,319
COLLIER	75	71	76	82	82
DUVAL	587	746	724	798	815
ESCAMBIA	88	89	83	90	111
HERNANDO	35	33	35	25	20
HILLSBOROUGH	570	572	630	646	666
INDIAN RIVER	17	19	24	27	26
LAKE	36	40	38	33	36
LEE	160	185	167	127	165
LEON	148	155	178	189	198
MANATEE	22	25	21	34	35
MARION	35	41	44	49	50
MARTIN	58	67	61	79	91
MIAMI-DADE	2,127	2,015	2,134	2,183	2,172
MONROE	18	17	20	20	23
OKALOOSA	18	21	28	38	42
ORANGE	534	617	735	838	883
OSCEOLA	9	9	21	31	24
PALM BEACH	415	482	472	500	498
PASCO					
PINELLAS					
POLK					
SARASOTA					
SEMINOLE					
ST JOHNS					
ST LUCIE					
VOLUSIA					

PASCO	52	52	63	62	71
PINELLAS	610	619	645	615	611
POLK	52	54	45	38	29
SARASOTA	77	90	110	131	139
SEMINOLE	69	84	129	165	236
ST JOHNS	48	44	36	46	72
ST LUCIE	61	87	139	173	203
VOLUSIA	146	126	194	194	164

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	49	53	68	66	68	39%	1.34	1.34
BAY	34	34	33	27	28	-18%	0.96	0.95
BREVARD	72	86	87	82	72	0%	1.12	0.30
BROWARD	734	771	830	818	780	6%	1.06	1.34
CITRUS	11	12	14	13	12	9%	0.43	0.24
CLAY	4	6	14	19	15	275%	0.06	0.16
COLLIER	103	108	116	117	118	15%	0.48	0.55
DUVAL	217	211	223	236	255	18%	0.59	1.33
ESCAMBIA	69	77	77	83	86	25%	0.55	0.68
FLAGLER	0	1	11	14	16	NC	0.00	0.44
GADSDEN	0	3	4	4	8	NC	0.06	0.30
HERNANDO	16	17	19	18	16	0%	0.89	0.55
HIGHLANDS	8	0	4	7	4	-50%	0.09	0.09
HILLSBOROUGH	417	426	424	381	370	-11%	0.77	0.83
HOLMES	4	4	5	4	4	0%	0.41	0.82
INDIAN RIVER	32	36	41	52	55	72%	0.51	0.53
LAKE	35	40	34	32	31	-11%	0.35	0.34
LEE	140	148	176	194	216	54%	0.58	0.61
LEON	94	97	124	112	113	20%	0.70	1.03
MANATEE	33	35	40	39	44	33%	0.14	0.24
MARION	49	53	59	70	72	47%	0.33	0.46
MARTIN	47	46	47	54	67	43%	0.95	1.25
MIAMI-DADE	1,195	1,245	1,337	1,326	1,241	4%	1.54	1.63
MONROE	18	24	33	34	40	122%	0.44	0.77
OKALOOSA	38	44	54	53	59	55%	0.22	0.43
ORANGE	287	314	389	418	414	44%	0.62	1.06
OSCEOLA	23	16	26	29	26	13%	0.23	0.30
PALM BEACH	406	473	559	576	543	34%	0.61	0.74
PASCO	31	34	45	51	72	132%	0.68	0.66
PINELLAS	387	424	464	480	468	21%	0.95	1.06

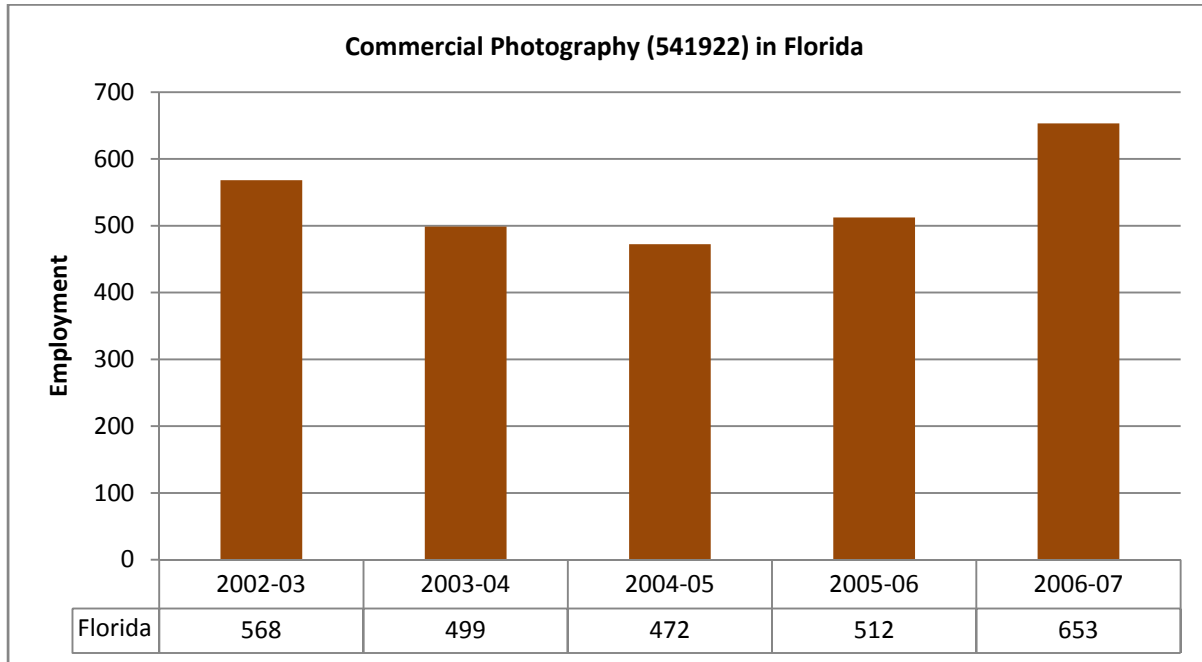
POLK	67	77	64	60	55	-18%	0.25	0.14
SANTA ROSA	14	12	12	12	12	-14%	0.17	0.06
SARASOTA	138	157	180	180	174	26%	0.42	0.73
SEMINOLE	92	111	159	173	173	88%	0.34	1.00
ST JOHNS	34	40	46	43	51	50%	1.13	1.23
ST LUCIE	44	35	35	44	48	9%	0.80	2.24
SUMTER	0	0	0	4	14	NC	0.12	0.25
VOLUSIA	101	88	115	106	88	-13%	0.99	0.74
WALTON	9	11	10	14	16	78%	0.55	0.28

NC = Not Calculable

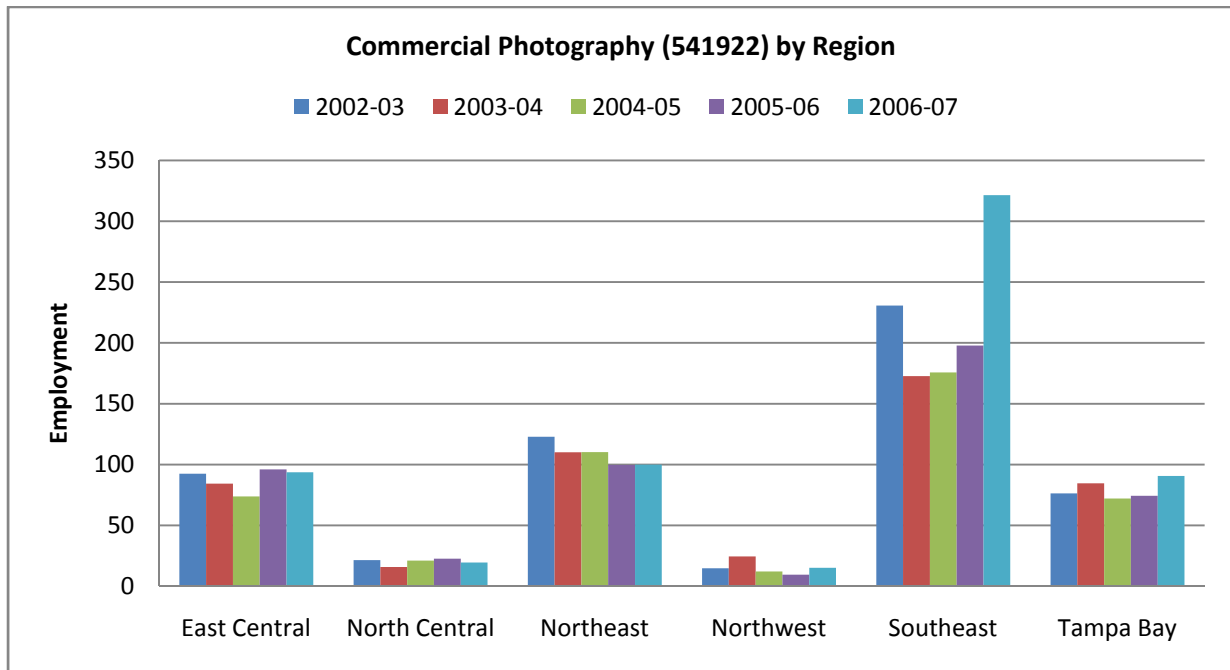
Source: Agency for Workforce Innovation. Employment data suppressed for Bradford, Charlotte, Citrus, Clay, Columbia, Flagler, Gadsden, Gilchrist, Highlands, Holmes, Jackson, Levy, Nassau, Okeechobee, Putnam, Santa Rosa, Sumter, Suwannee, Wakulla, and Walton counties.

541922 Commercial Photography

This U.S. industry comprises establishments primarily engaged in providing commercial photography services, generally for advertising agencies, publishers, and other business and industrial users. Employment in this industry fluctuated wildly in Florida between 2002 and 2007, with the largest swing occurring in the Southeast.

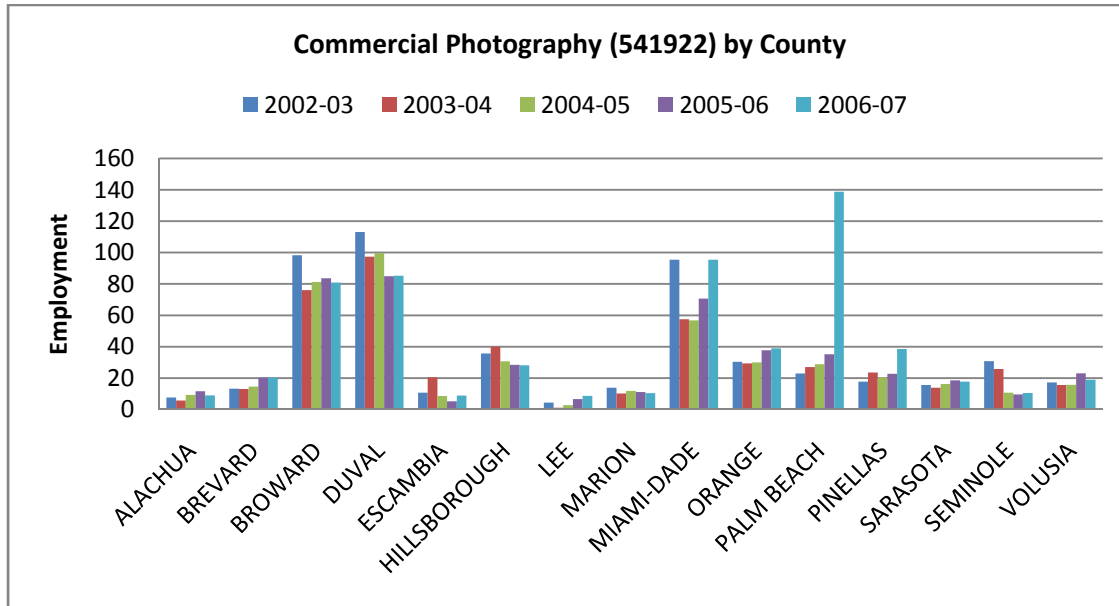


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	820	847	883	936	947	15%	0.77	0.78
Florida	820	847	883	936	947	15%	0.77	0.78



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	92	84	74	96	94
North Central	22	16	21	23	19
Northeast	123	110	110	100	100
Northwest	15	24	12	9	15
Southeast	231	173	176	198	321
Tampa Bay	76	85	72	74	91

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	151	161	176	197	191	26%	0.62	0.60
North Central	28	29	37	38	40	43%	0.73	0.70
Northeast	68	79	81	81	78	15%	2.29	1.54
Northwest	19	18	17	20	28	47%	0.12	0.31
Southwest	36	35	37	36	41	14%	0.49	0.37
Southeast	394	403	407	430	431	9%	0.92	1.06
Tampa Bay	124	122	128	131	134	8%	0.44	0.51



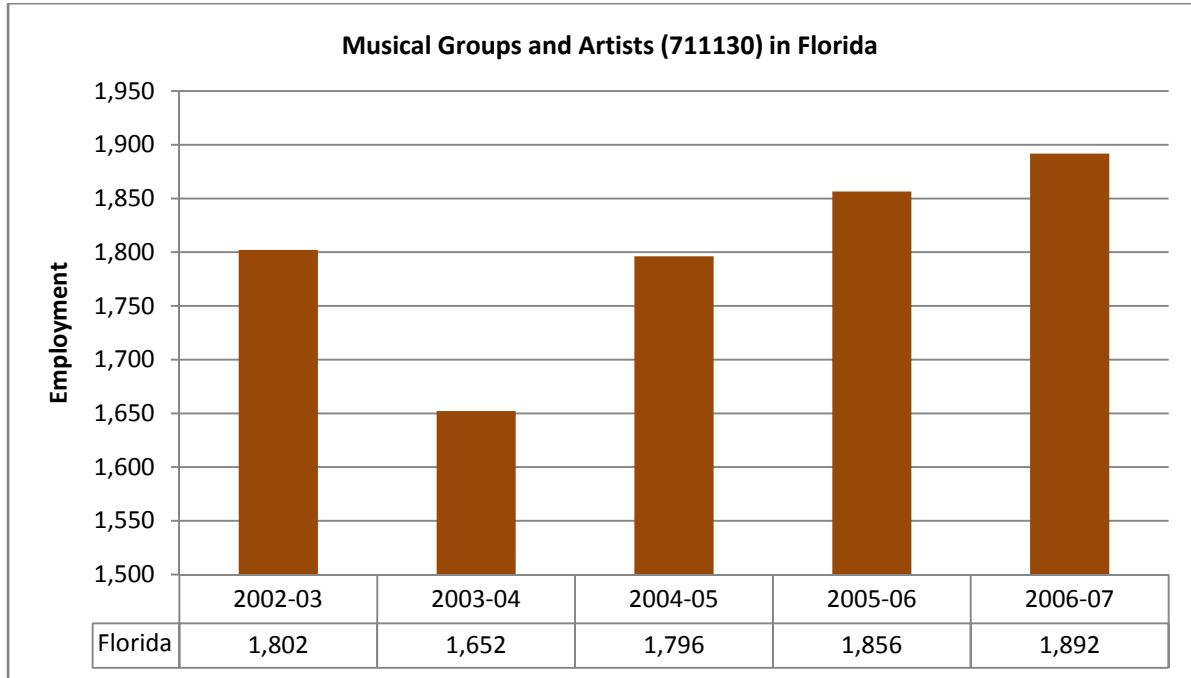
Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	8	6	9	12	9
BREVARD	13	13	15	20	20
BROWARD	98	76	81	84	81
DUVAL	113	97	100	85	85
ESCAMBIA	11	21	9	5	9
HILLSBOROUGH	36	40	31	29	28
LEE	4	1	3	7	9
MARION	14	10	12	11	10
MIAMI-DADE	95	58	57	71	96
ORANGE	30	29	30	38	39
PALM BEACH	23	27	29	35	139
PINELLAS	18	24	20	23	39
SARASOTA	16	14	16	19	18
SEMINOLE	31	26	11	10	11
VOLUSIA	17	16	16	23	19

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	16	15	21	24	26	63%	0.43	0.64
BREVARD	11	13	14	18	22	100%	0.55	1.11
BROWARD	127	134	143	151	149	17%	1.28	0.89
CLAY	4	7	8	8	8	100%	0.76	0.40
COLLIER	21	22	21	22	27	29%	0.79	0.39
DUVAL	49	50	50	50	48	-2%	2.77	1.86
ESCAMBIA	8	8	8	8	12	50%	0.23	0.54
FLAGLER	1	4	4	6	8	700%	0.00	0.59
HILLSBOROUGH	66	63	59	57	52	-21%	0.53	0.46
INDIAN RIVER	4	4	4	4	4	0%	0.11	0.10
LAKE	6	4	6	8	9	50%	0.13	0.17
LEE	15	13	16	14	14	-7%	0.43	0.44
LEON	4	4	5	6	8	100%	0.14	0.30
MANATEE	8	8	6	6	8	0%	0.24	0.62
MARION	12	14	16	14	14	17%	1.71	1.28
MIAMI-DADE	190	182	169	179	178	-6%	0.90	0.77
MONROE	4	4	6	8	7	75%	1.90	3.22
OKALOOSA	5	4	4	4	4	-20%	0.08	0.38
ORANGE	74	79	87	100	100	35%	0.36	0.38
PALM BEACH	61	69	77	85	93	52%	0.50	1.99
PINELLAS	34	36	40	38	48	41%	0.28	0.63
POLK	4	4	4	4	4	0%	0.19	0.06
SARASOTA	8	8	17	24	22	175%	1.31	1.35
SEMINOLE	31	35	34	28	21	-32%	1.64	0.53
ST JOHNS	7	10	14	16	14	100%	0.96	1.27
VOLUSIA	29	30	35	43	39	34%	1.10	1.41

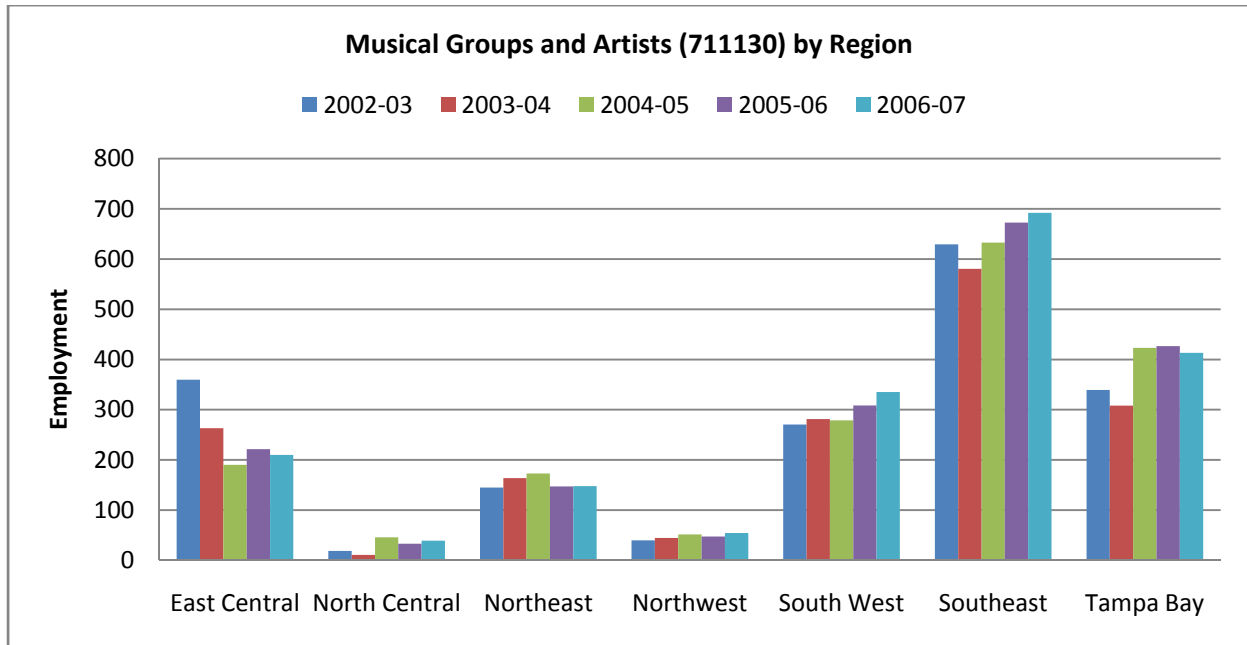
Source: Agency for Workforce Innovation. Employment data suppressed for Clay, Citrus, Collier, Flagler, Highlands, Indian River, Jefferson, Lake, Leon, Manatee, Martin, Monroe, Nassau, Okaloosa, Polk, Putnam, St. Johns, St. Lucie, and Walton counties.

711130 Musical Groups and Artists

This industry comprises (1) groups primarily engaged in producing live musical entertainment (except theatrical musical or opera productions) and (2) independent (i.e., freelance) artists primarily engaged in providing live musical entertainment. Musical groups and artists may perform in front of a live audience or in a studio, and may or may not operate their own facilities for staging their shows. This is another fairly stable industry with the Florida Film and Entertainment Industry relative to employment.

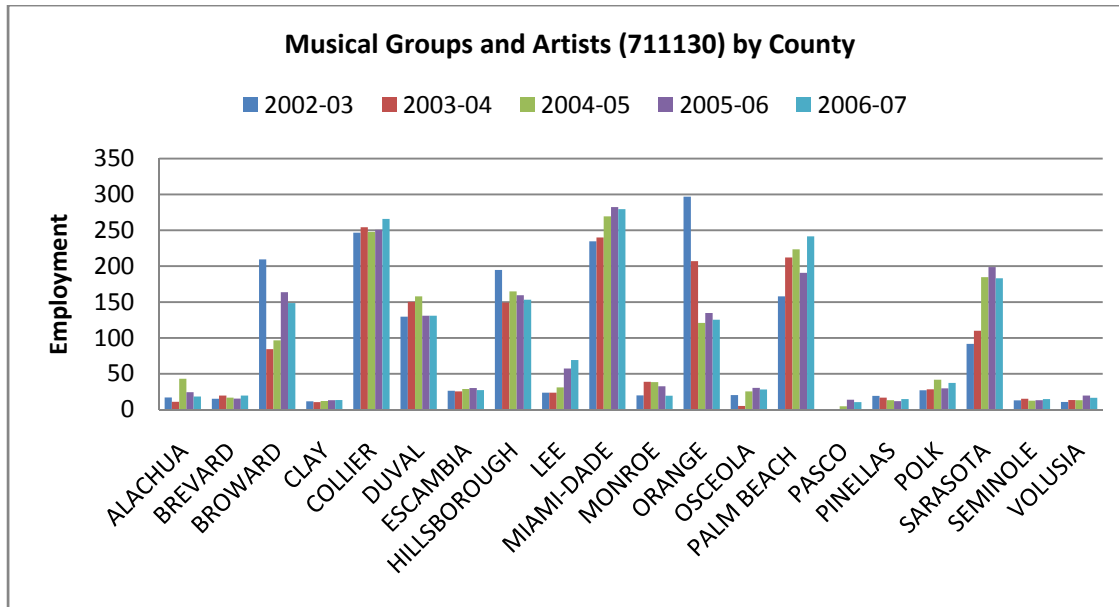


	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	1,319	1,372	1,642	1,677	1,648	25%	0.84	0.86



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	360	263	190	222	210
North Central	19	11	46	33	39
Northeast	145	164	173	147	148
Northwest	40	45	52	47	54
South West	270	281	279	308	335
Southeast	629	580	633	673	692
Tampa Bay	339	308	423	427	413

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth	2002	2007
						2002 to 2007	Location Quotient	Location Quotient
East Central	239	236	253	298	295	23%	0.89	0.54
North Central	21	20	30	35	46	119%	0.54	0.25
Northeast	43	38	51	46	46	7%	1.15	0.83
Northwest	45	40	45	45	56	24%	0.50	0.45
Southwest	53	61	75	83	73	38%	1.05	2.25
Southeast	721	794	949	931	911	26%	1.02	1.03
Tampa Bay	197	183	233	235	217	10%	0.56	0.81



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	17	11	43	24	18
BREVARD	15	20	17	15	20
BROWARD	210	84	97	164	149
CLAY	12	10	12	13	13
COLLIER	247	254	248	251	266
DUVAL	130	150	158	131	131
ESCAMBIA	26	25	29	30	27
HILLSBOROUGH	195	149	165	159	153
LEE	24	24	31	57	69
MIAMI-DADE	235	240	269	282	279
MONROE	20	39	38	33	19
ORANGE	297	207	121	135	125
OSCEOLA	20	5	26	30	28
PALM BEACH	158	212	223	191	242
PASCO	0	0	5	14	11
PINELLAS	19	17	13	12	15
POLK	27	28	42	30	37
SARASOTA	92	110	185	199	183
SEMINOLE	13	15	13	13	15
VOLUSIA	11	13	13	20	16

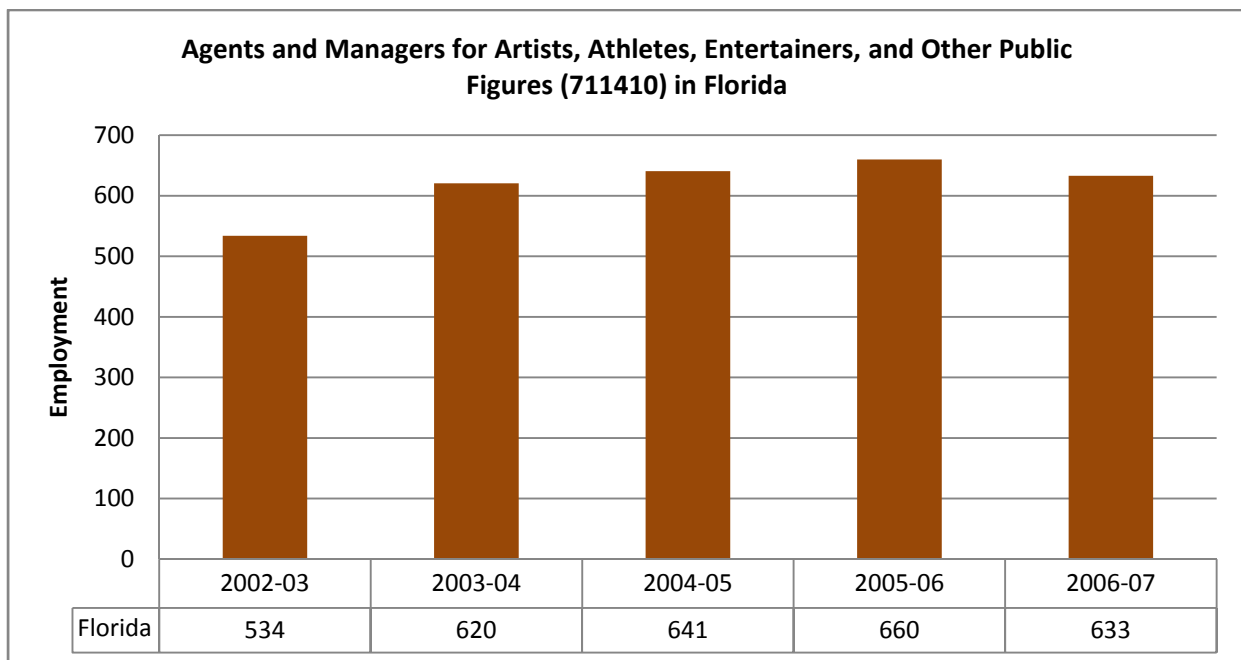
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	16	16	25	28	27	69%	0.46	0.17
BAY	5	4	10	5	4	-20%	1.02	0.80
BREVARD	24	21	22	25	31	29%	0.21	0.53
BROWARD	220	224	254	270	278	26%	1.16	0.98
CLAY	8	8	7	9	11	38%	0.76	0.79
COLLIER	22	22	29	33	22	0%	2.53	4.88
DUVAL	25	21	31	28	23	-8%	1.42	0.89
ESCAMBIA	24	24	23	23	28	17%	0.62	0.69
HILLSBOROUGH	72	57	73	77	64	-11%	0.85	0.75
INDIAN RIVER	4	4	4	4	0	-100%	0.30	0.43
LAKE	8	5	0	9	12	50%	0.90	0.29
LEE	31	36	42	46	46	48%	0.31	0.88
LEON	6	0	0	0	5	-17%	0.57	0.15
MANATEE	10	14	13	15	15	50%	0.14	0.75
MARION	5	0	5	7	19	280%	0.97	0.53
MARTIN	14	6	4	4	4	-71%	0.88	0.14
MIAMI-DADE	301	363	437	408	381	27%	0.99	0.98
MONROE	29	34	34	34	35	21%	1.07	1.60
OKALOOSA	4	4	4	4	5	25%	0.26	0.17
ORANGE	146	132	130	148	141	-3%	1.47	0.63
OSCEOLA	17	17	29	36	36	112%	1.30	1.08
PALM BEACH	145	157	209	201	196	35%	1.01	1.38
PASCO	0	0	15	27	23	NC	0.00	0.33
PINELLAS	59	59	62	49	46	-22%	0.11	0.17
POLK	7	11	18	20	23	229%	0.44	1.02
SANTA ROSA	2	4	4	4	4	100%	0.20	0.77
SARASOTA	43	34	46	43	42	-2%	1.55	3.09
SEMINOLE	26	33	32	34	32	23%	0.28	0.41
ST JOHNS	6	0	4	4	4	-33%	0.19	0.35
ST LUCIE	8	6	7	10	13	63%	0.79	0.22
SUMTER	0	0	4	12	10	NC	0.00	0.96
VOLUSIA	18	28	32	34	33	83%	0.08	0.30
WALTON	4	4	4	9	8	100%	0.57	1.39

NC = Not Calculable

Source: Agency for Workforce Innovation. Employment data suppressed for Bay, Charlotte, Citrus, Flagler, Highlands, Indian River, Lake, Leon, Manatee, Marion, Martin, Nassau, Okaloosa, Santa Rosa, St. Johns, St. Lucie, Sumter, and Walton counties.

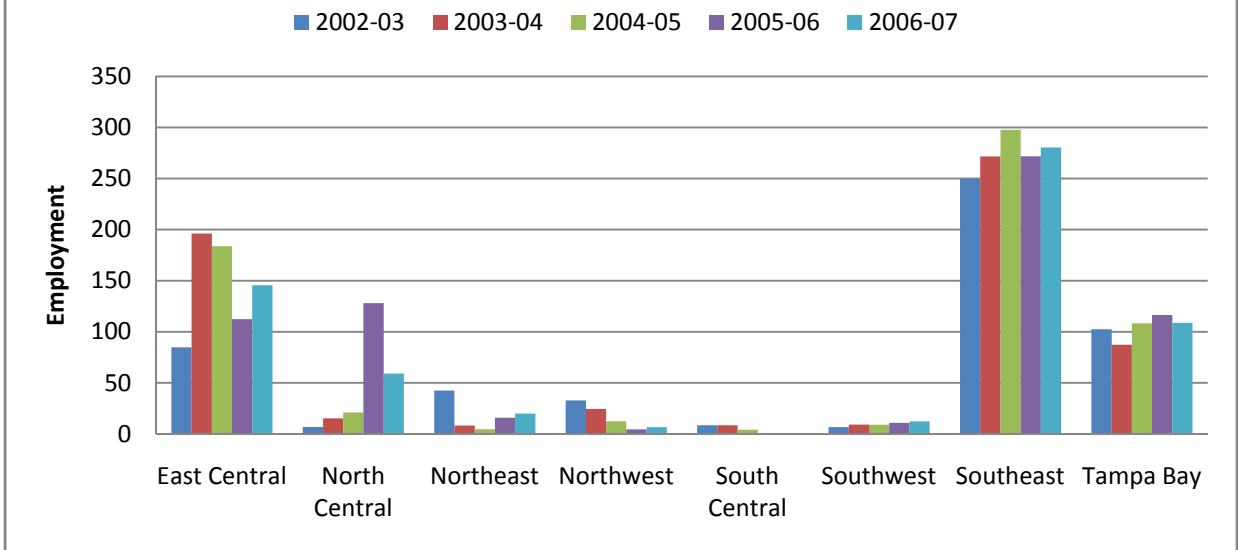
711410 Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures

This industry comprises establishments of agents and managers primarily engaged in representing and/or managing creative and performing artists, sports figures, entertainers, and other public figures. The representation and management includes activities, such as representing clients in contract negotiations; managing or organizing client's financial affairs; and generally promoting the careers of their clients. Employment in this industry occurs throughout the state, with the largest growth occurring in the East Central Region.



	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	837	863	903	962	1,021	22%	1.07	1.00
Florida	837	863	903	962	1,021	22%	1.07	1.00

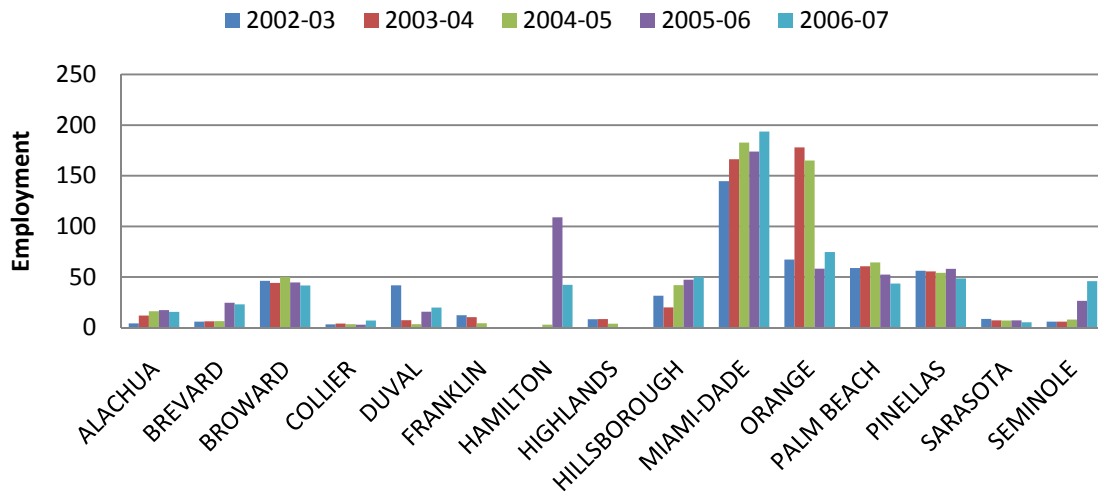
Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures (711410) by Region



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	85	196	184	112	146
North Central	7	15	21	128	59
Northeast	43	8	5	16	20
Northwest	33	24	12	4	7
South Central	8	9	4	0	0
Southwest	7	9	9	11	12
Southeast	250	272	298	272	280
Tampa Bay	102	87	108	116	109

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
East Central	152	161	151	190	204	34%	1.03	1.01
North Central	20	25	25	25	22	10%	0.63	0.86
Northeast	16	14	18	29	39	144%	0.89	0.74
Northwest	37	42	34	21	22	-41%	0.76	0.59
South Central	4	4	2	2	4	0%	0.30	0.32
Southwest	29	33	35	35	37	28%	0.96	0.78
Southeast	422	434	473	496	519	23%	1.41	1.38
Tampa Bay	157	150	165	164	174	11%	0.88	0.78

**Agents and Managers for Artists, Athletes, Entertainers, and Other Public
Figures (711410) by County**



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	4	12	16	17	16
BREVARD	6	6	6	25	23
BROWARD	46	44	50	45	42
COLLIER	3	4	4	3	7
DUVAL	42	8	4	16	20
FRANKLIN	12	10	5	0	0
HAMILTON	0	0	3	109	42
HIGHLANDS	8	9	4	0	0
HILLSBOROUGH	32	20	42	47	50
MIAMI-DADE	145	166	183	174	194
ORANGE	67	178	165	58	75
PALM BEACH	59	61	64	53	44
PINELLAS	56	56	54	58	49
SARASOTA	9	7	7	7	5
SEMINOLE	6	6	8	27	46

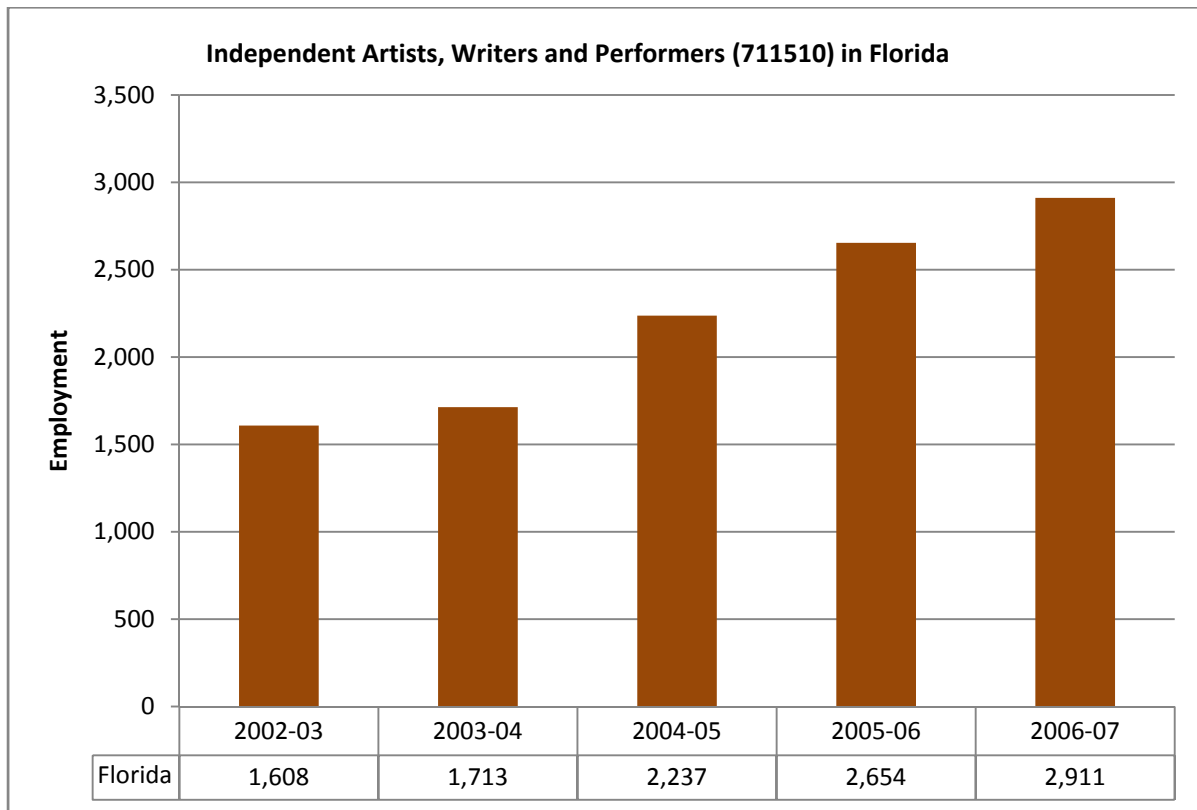
Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	5	12	12	11	12	140%	0.62	0.91
BAY	7	12	10	8	8	14%	0.73	0.57
BREVARD	11	10	12	22	26	136%	0.90	0.86
BROWARD	125	129	152	148	141	13%	1.53	1.31
COLLIER	12	14	14	12	15	25%	0.81	0.78
DUVAL	12	10	14	25	37	208%	0.81	0.74
HILLSBOROUGH	59	48	58	62	71	20%	0.74	0.85
LAKE	6	10	8	4	2	-67%	0.80	0.62
LEE	17	19	21	23	22	29%	1.11	0.74
LEON	8	6	0	0	4	-50%	0.59	0.70
LEVY	4	4	7	6	4	0%	0.14	0.88
MANATEE	0	1	10	8	10	NC	1.00	0.60
MARION	8	8	4	4	4	-50%	0.63	0.54
MIAMI-DADE	214	218	226	245	274	28%	1.35	1.70
OKALOOSA	10	12	12	10	6	-40%	0.42	0.59
ORANGE	121	121	103	120	128	6%	1.22	1.23
PALM BEACH	83	85	91	97	95	14%	1.53	1.09
PASCO	4	4	4	4	7	75%	0.65	0.91
PINELLAS	72	68	71	73	74	3%	1.22	0.95
POLK	8	8	5	0	0	-100%	0.53	0.33
SARASOTA	14	21	17	16	10	-29%	0.87	0.76
SEMINOLE	10	13	22	37	41	310%	1.20	1.35

NC = Not Calculable

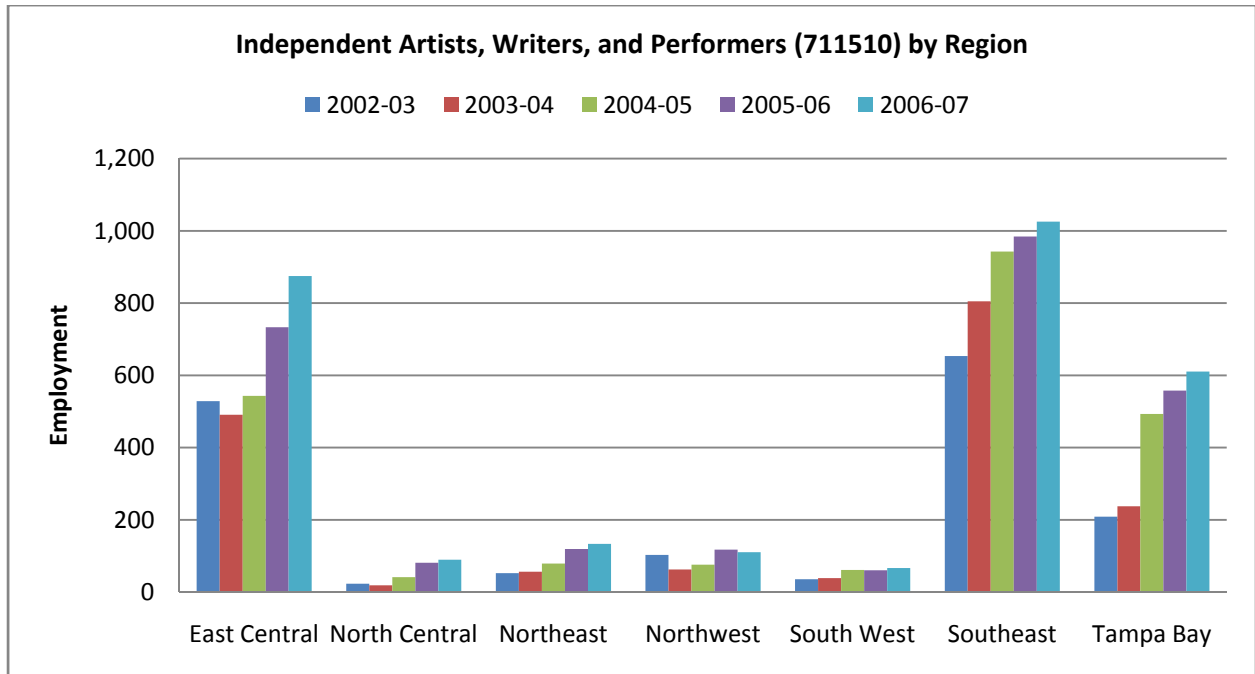
Source: Agency for Workforce Innovation. Employment data suppressed for Bay, Hernando, Indian River, Jackson, Lake, Lee, Leon, Levy, Manatee, Marion, Okaloosa, Osceola, Pasco, Polk, St. Johns, St. Lucie, Sumter, Volusia, and Walton counties.

711510 Independent Artists, Writers, and Performers

This industry comprises independent (i.e., freelance) individuals primarily engaged in performing in artistic productions, in creating artistic and cultural works or productions, or in providing technical expertise necessary for these productions. This industry also includes athletes and other celebrities exclusively engaged in endorsing products and making speeches or public appearances for which they receive a fee. This industry has seen significant growth in Florida between 2002 and 2007 of nearly 1,300 jobs. All regions benefited from this growth.



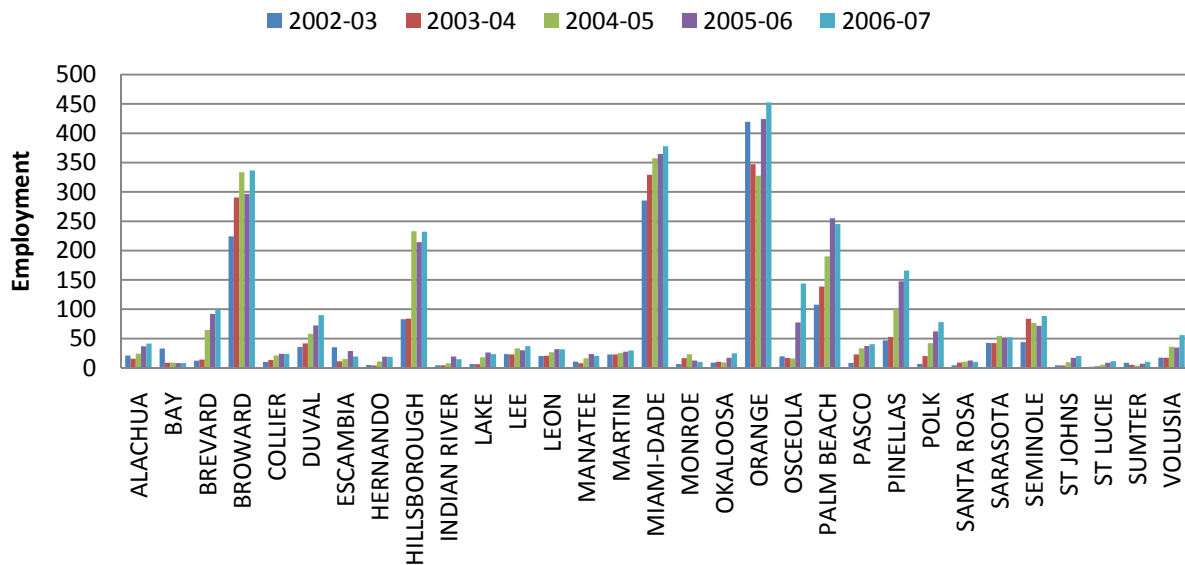
	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
Establishments	2,828	3,408	5,007	5,979	6,584	133%	0.90	0.88



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
East Central	528	491	543	733	875
North Central	23	19	41	81	90
Northeast	52	56	79	119	133
Northwest	103	63	76	117	111
South West	36	38	61	60	66
Southeast	654	805	943	984	1,026
Tampa Bay	209	238	493	558	610

Establishments	2002-	2003-	2004-	2005-	2006-	Growth	2002	2007
	03	04	05	06	07	2002 to 2007	Location Quotient	Location Quotient
East Central	540	602	869	1061	1246	131%	1.03	1.00
North Central	51	59	110	164	158	210%	0.72	0.74
Northeast	155	176	241	343	355	129%	0.82	0.84
Northwest	157	177	233	301	255	62%	0.89	0.84
South Central	4	6	7	4	7	75%	0.37	0.37
Southwest	93	114	222	234	247	166%	1.06	0.91
Southeast	1,327	1,701	2,422	2,827	3,182	140%	0.91	0.87
Tampa Bay	501	573	903	1045	1134	126%	0.85	0.87

Independent Artists, Writers, and Performers (711510) by County



Employment	2002-03	2003-04	2004-05	2005-06	2006-07
ALACHUA	21	16	24	37	41
BAY	33	9	9	8	8
BREVARD	12	14	65	92	101
BROWARD	224	290	334	297	337
COLLIER	10	13	21	24	24
DUVAL	36	42	58	72	90
ESCAMBIA	35	11	15	29	19
HERNANDO	5	4	11	19	19
HILLSBOROUGH	83	84	233	214	232
INDIAN RIVER	5	5	8	19	15
LAKE	7	6	18	26	23
LEE	24	23	33	30	37
LEON	20	21	27	32	32
MANATEE	11	8	16	24	21
MARTIN	23	23	25	27	30
MIAMI-DADE	285	329	357	365	378
MONROE	7	17	23	12	10
OKALOOSA	9	11	9	17	25
ORANGE	420	347	328	424	452
OSCEOLA	20	17	16	78	144
PALM BEACH	108	139	190	255	245
PASCO	8	23	33	38	40

PINELLAS	47	53	100	148	166
POLK	7	20	42	62	78
SANTA ROSA	5	9	11	13	10
SARASOTA	43	42	55	52	52
SEMINOLE	44	84	77	72	89
ST JOHNS	4	4	10	17	20
ST LUCIE	2	3	5	9	11
SUMTER	9	5	4	7	10
VOLUSIA	17	17	36	35	56

Establishments	2002-03	2003-04	2004-05	2005-06	2006-07	Growth 2002 to 2007	2002 Location Quotient	2007 Location Quotient
ALACHUA	44	48	63	76	85	93%	0.86	1.00
BAY	21	28	25	13	12	-43%	0.82	0.86
BREVARD	47	52	76	98	128	172%	1.04	1.20
BROWARD	399	524	738	880	1,045	162%	1.00	0.90
CHARLOTTE	4	8	13	15	15	275%	1.19	1.32
CITRUS	9	4	5	8	11	22%	0.99	0.93
CLAY	6	5	5	21	23	283%	0.92	0.80
COLLIER	36	47	83	104	102	183%	1.09	0.94
DUVAL	117	139	170	208	222	90%	0.79	0.84
ESCAMBIA	29	34	49	59	47	62%	0.99	0.85
FLAGLER	12	12	12	19	20	67%	0.64	0.50
FRANKLIN	2	0	4	9	8	300%	1.65	1.08
HERNANDO	12	9	25	53	50	317%	0.84	0.93
HILLSBOROUGH	141	175	250	294	360	155%	0.63	0.62
INDIAN RIVER	19	21	22	29	37	95%	0.85	0.78
JACKSON	0	0	4	8	6	NC	0.17	0.19
LAKE	21	19	41	57	65	210%	0.99	0.91
LEE	53	59	126	115	130	145%	1.01	0.80
LEON	65	64	74	93	86	32%	1.03	1.03
MANATEE	20	22	65	73	59	195%	1.07	0.90
MARION	3	6	32	57	54	1700%	0.71	0.65
MARTIN	38	40	51	58	59	55%	1.08	1.07
MIAMI-DADE	526	713	971	1,157	1,216	131%	0.78	0.82
MONROE	19	30	37	36	27	42%	2.15	2.52
NASSAU	6	5	13	26	22	267%	1.20	1.10
OKALOOSA	26	28	34	37	35	35%	0.74	0.79
OKEECHOBEE	4	4	5	4	0	-100%	0.24	0.21
ORANGE	330	363	510	600	674	104%	1.09	0.98
OSCEOLA	17	14	23	39	49	188%	0.66	0.81

PALM BEACH	315	360	568	639	767	143%	0.96	0.82
PASCO	23	32	68	86	96	317%	0.72	0.74
PINELLAS	149	177	252	259	263	77%	0.98	1.10
POLK	12	23	44	80	113	842%	0.63	0.71
PUTNAM	0	0	2	10	14	NC	0.48	0.47
SANTA ROSA	10	13	27	48	37	270%	1.13	0.82
SARASOTA	135	131	194	192	182	35%	1.37	1.42
SEMINOLE	75	105	143	165	191	155%	1.16	1.15
ST JOHNS	14	15	37	55	50	257%	1.17	1.08
ST LUCIE	11	13	35	28	31	182%	0.86	0.70
SUMTER	12	8	4	8	12	0%	0.75	0.44
VOLUSIA	38	41	72	94	127	234%	0.82	0.86
WALTON	0	6	9	15	12	NC	0.96	0.73

NC = Not Calculable

Source: Agency for Workforce Innovation. Employment data suppressed for Baker, Bradford, Charlotte, Citrus, Clay, Columbia, DeSoto, Flagler, Franklin, Gadsden, Gilchrist, Glades, Gulf, Holmes, Jackson, Jefferson, Levy, Madison, Marion, Nassau, Okeechobee, Putnam, Suwannee, Taylor, Wakulla, Walton, and Washington counties.

Establishment Assessment

In addition to producing feature films and filmed television programs, establishments in the Florida Film and Entertainment Industry produce made-for-television movies, music videos, digital media-based entertainment, and commercials. Establishments engaged primarily in operating motion picture theaters and exhibiting motion pictures or videos at film festivals are included in this industry, but have been excluded from this study. Other Florida establishments provide post-production services to the motion picture industry, such as editing, film and tape transfers, titling and subtitling, credits, closed captioning, computer-produced graphics, and animation and special effects.

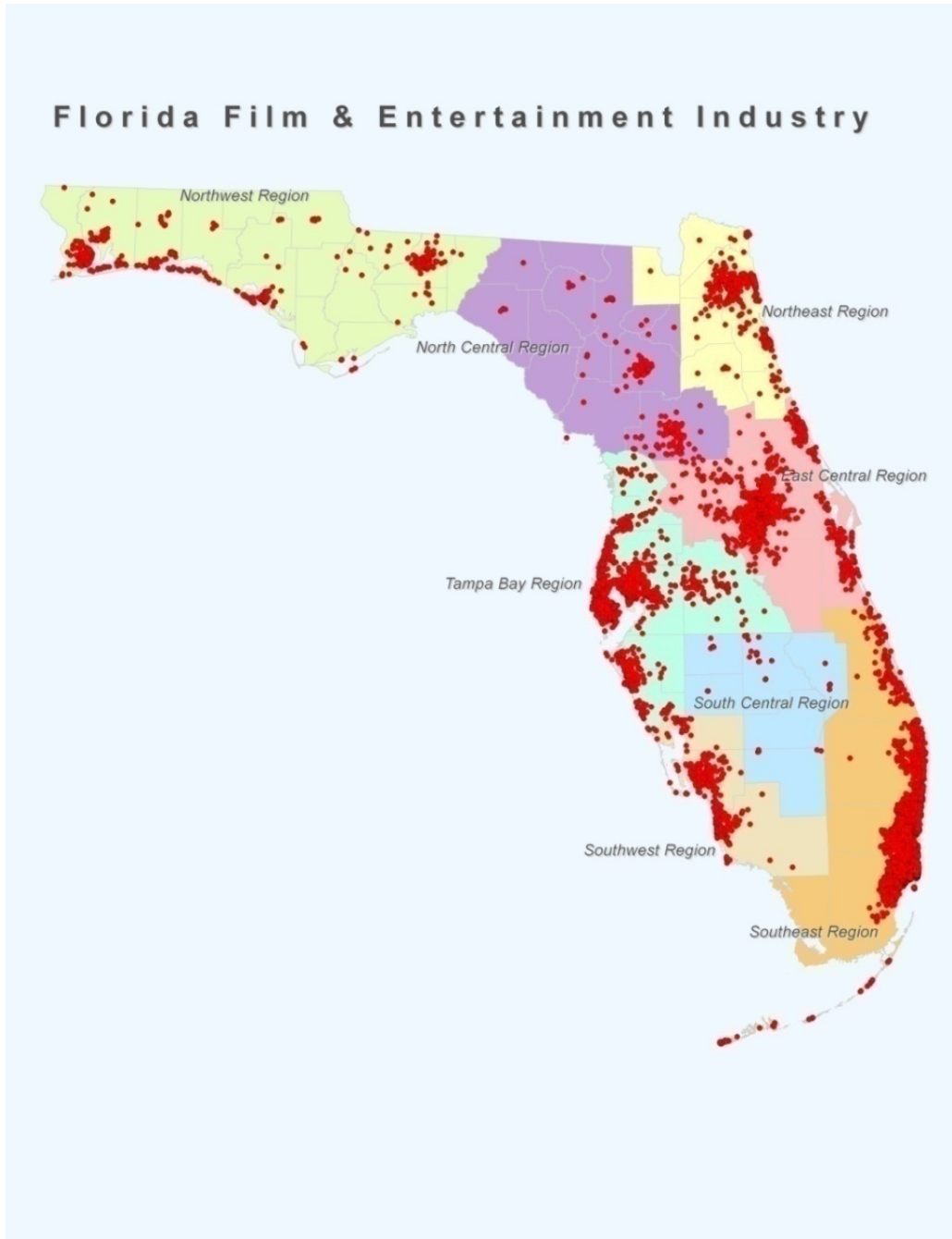
In order to analyze establishments, businesses were looked at not only under their NAICS code classifications, but also under their Standard Industry Classification (SIC) codes in order to better distinguish between those in production and post-production services. SIC codes utilized for the establishment assessment included the following:

- 154217 – Motion Picture Set Design and Costuming
- 386105 – Motion Picture Equipment
- 504304 – Motion Picture Equipment and Supplies
- 506356 – Lighting Film and Video
- 573128 – Motion Picture Equipment
- 731105 – Advertising – Motion Picture
- 781205 – Film Production Services

781206 – Television Films Producers
781207 – Motion Picture Sound Services
781208 – Film Studio Production Facilities
781211 – Video Production services
781212 – Animated Film Services
781215 – Motion Picture Film Dubbing
781216 – Motion Picture Stock Shots
781901 – Video Post-Production
781902 – Reproduction Services – Motion Pictures
781903 – Editing Services – Motion Picture Production
781904 – Motion Picture Film Editing
781905 – Motion Picture Consultants
781906 – Motion Picture Representatives
781907 – Motion Picture Film Laboratories
781909 – Motion Picture Special Effects
781911 – Motion Picture Location Services
781912 – Television Program Producers – Services/Supplies
781913 – Casting Directors
781914 – Motion Picture Research Services
781915 – Motion Picture Film Technicians
781916 – Closed Captioning Service
781917 – Motion Picture Casting
781918 – Motion Picture Servicing
781919 – Titling Service – Television and Motion Pictures
781920 – Motion Picture Film Editing Facilities
781921 – Motion Picture Film Scoring
781923 – Sound Effects Libraries
781925 – Computer Animation
781998 – Service Allied to Motion Pictures
782202 – Motion Picture Film Distributors
782901 – Motion Picture Film Libraries
782902 – Motion Picture Film Delivery

Figure 4 shows the location and distribution of establishments within the Florida Film and Entertainment Industry by region. As previously noted, a listing of the counties included in each region can be found in Appendix A.

Figure 4 – Florida Film and Entertainment Industry Clusters



Using NAICS Code definitions and historical data from InfoUSA, a proprietary database of over 14 million US businesses, Table 7 shows the trend in establishment numbers in Florida from 2003 through 2007 for the component industries. During that time period, the total number of establishments declined by 1.9 percent.

Table 7 – Statewide Establishments

STATEWIDE ESTABLISHMENTS	Year					2003-07
NAICS CODE DESCRIPTION	2003	2004	2005	2006	2007	% change
ADVERTISING AGENCIES	2,114	2,064	2,076	2,111	2,093	-1.0%
AGENTS & MANAGERS FOR PUBLIC FIGURES	181	151	150	169	152	-16.0%
AUDIO & VIDEO MEDIA REPRODUCTION	129	126	125	112	102	-20.9%
CABLE & OTHER SUBSCRIPTION PROGRAMMING	395	361	381	397	426	7.8%
COMMERCIAL PHOTOGRAPHY	1,352	1,266	1,288	1,228	1,210	-10.5%
INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	1,858	1,820	1,884	1,991	2,020	8.7%
MOTION PICTURE & VIDEO DISTRIBUTION	30	29	24	23	23	-23.3%
MOTION PICTURE & VIDEO PRODUCTION	1,392	1,364	1,405	1,261	1,259	-9.6%
MUSICAL GROUPS & ARTISTS	278	251	250	243	235	-15.5%
MOTION PICTURE EQUIPMENT RENTAL	691	670	705	660	640	-7.4%
OTHER MOTION PICTURE & VIDEO INDUSTRIES	14	18	24	19	17	21.4%
OTHER SOUND RECORDING INDUSTRIES	299	279	289	281	268	-10.4%
SOUND RECORDING STUDIOS	596	559	560	536	496	-16.8%
TALENT PAYMENT SERVICES	319	331	372	406	422	32.3%
TELEPRODUCTION & POSTPRODUCTION SVCS	10	9	20	143	143	1330.0%
TELEVISION BROADCASTING	283	301	311	321	320	13.1%
WARDROBE RENTAL	463	435	431	396	378	-18.4%
Grand Total	10,404	10,034	10,295	10,297	10,204	-1.9%
Annual Percentage Change		-3.6%	2.6%	0.0%	-0.9%	

Table 8 provides revenue information for the establishments for the same time period. While the number of establishments declined during 2003 to 2007, revenues increased 46 percent.

Table 8 – Establishment Revenue

STATEWIDE REVENUE	Year					2003-07
NAICS CODE DESCRIPTION	2003	2004	2005	2006	2007	% change
ADVERTISING AGENCIES	\$ 4,677,490,000	\$ 4,732,653,000	\$ 4,539,162,000	\$ 5,723,537,000	\$ 6,078,570,000	30.0%
AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 115,361,000	\$ 109,052,000	\$ 112,082,000	\$ 271,671,000	\$ 239,538,000	107.6%
AUDIO & VIDEO MEDIA REPRODUCTION	\$ 199,557,000	\$ 178,668,000	\$ 158,748,000	\$ 204,708,000	\$ 196,175,000	-1.7%
CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 2,204,100,000	\$ 2,004,023,000	\$ 2,005,676,000	\$ 4,826,114,000	\$ 6,768,164,000	207.1%
COMMERCIAL PHOTOGRAPHY	\$ 425,888,000	\$ 395,103,000	\$ 363,718,000	\$ 639,348,000	\$ 441,971,000	3.8%
INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 1,178,793,000	\$ 1,231,180,000	\$ 1,443,351,000	\$ 2,079,817,000	\$ 1,790,881,000	51.9%
MOTION PICTURE & VIDEO DISTRIBUTION	\$ 173,936,000	\$ 149,975,000	\$ 91,784,000	\$ 44,555,000	\$ 56,749,000	-67.4%
MOTION PICTURE & VIDEO PRODUCTION	\$ 1,964,016,000	\$ 1,879,977,000	\$ 1,967,048,000	\$ 1,960,251,000	\$ 1,831,520,000	-6.7%
MUSICAL GROUPS & ARTISTS	\$ 233,332,000	\$ 298,465,000	\$ 308,445,000	\$ 308,672,000	\$ 314,375,000	34.7%
MOTION PICTURE EQUIPMENT RENTAL	\$ 3,101,488,000	\$ 4,787,868,000	\$ 4,575,273,000	\$ 3,565,324,000	\$ 3,255,536,000	5.0%
OTHER MOTION PICTURE & VIDEO INDUSTRIES	\$ 8,695,000	\$ 14,234,000	\$ 21,204,000	\$ 59,560,000	\$ 59,271,000	581.7%
OTHER SOUND RECORDING INDUSTRIES	\$ 195,336,000	\$ 217,164,000	\$ 202,211,000	\$ 172,043,000	\$ 192,136,000	-1.6%
SOUND RECORDING STUDIOS	\$ 701,154,000	\$ 707,337,000	\$ 745,753,000	\$ 1,254,728,000	\$ 1,262,773,000	80.1%
TALENT PAYMENT SERVICES	\$ 246,410,000	\$ 275,831,000	\$ 321,587,000	\$ 332,889,000	\$ 443,614,000	80.0%
TELEPRODUCTION & POSTPRODUCTION SVCS	\$ 2,629,000	\$ 2,803,000	\$ 7,502,000	\$ 44,859,000	\$ 39,229,000	1392.2%
TELEVISION BROADCASTING	\$ 4,330,864,000	\$ 4,479,282,000	\$ 4,766,894,000	\$ 5,781,516,000	\$ 5,913,167,000	36.5%
WARDROBE RENTAL	\$ 169,262,000	\$ 171,144,000	\$ 173,852,000	\$ 216,989,000	\$ 211,675,000	25.1%
Grand Total	\$ 19,759,049,000	\$ 21,463,615,000	\$ 21,630,438,000	\$ 27,269,592,000	\$ 28,883,669,000	46.2%
Percentage Change		8.6%	0.8%	26.1%	5.9%	

Table 9 shows the number of establishments in the Florida Film and Entertainment Industry broken out by regions. The largest concentrations of firms are in the Southeast, East Central, and Tampa Bay regions, although the Northeast region added the most new businesses between 2003 and 2007.

Table 9 – Establishments by Region

ESTABLISHMENTS		Year					2003-07
Region	NAICS CODE DESCRIPTION	2003	2004	2005	2006	2007	% change
East Central	ADVERTISING AGENCIES	339	304	298	301	313	-7.7%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	27	24	21	22	21	-22.2%
	AUDIO & VIDEO MEDIA REPRODUCTION	19	15	15	11	13	-31.6%
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	71	64	68	74	76	7.0%
	COMMERCIAL PHOTOGRAPHY	269	232	236	242	250	-7.1%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	367	350	379	386	427	16.3%
	MOTION PICTURE & VIDEO PRODUCTION	262	271	266	271	283	8.0%
	MUSICAL GROUPS & ARTISTS	47	38	38	39	42	-10.6%
	MOTION PICTURE EQUIPMENT RENTAL	132	122	135	133	124	-6.1%
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	1	2	4	4	4	300.0%
	OTHER SOUND RECORDING INDUSTRIES	64	64	67	67	67	4.7%
	SOUND RECORDING STUDIOS	113	106	112	100	95	-15.9%
	TALENT PAYMENT SERVICES	51	51	63	71	72	41.2%
	TELEPRODUCTION & POSTPRODUCTION SVCS	5	4	5	4	7	40.0%
TELEVISION BROADCASTING	52	52	64	59	59	13.5%	
WARDROBE RENTAL	77	69	75	77	73	-5.2%	
East Central Total		1,896	1,768	1,846	1,861	1,926	1.6%
Percentage Change			-6.8%	4.4%	0.8%	3.5%	
North Central	ADVERTISING AGENCIES	74	67	73	72	79	6.8%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	3	3	2	3	3	0.0%
	AUDIO & VIDEO MEDIA REPRODUCTION	2	1	1	1	2	0.0%
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	41	29	35	37	35	-14.6%
	COMMERCIAL PHOTOGRAPHY	69	60	67	69	67	-2.9%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	61	61	56	54	71	16.4%
	MOTION PICTURE & VIDEO PRODUCTION	39	39	40	43	42	7.7%
	MUSICAL GROUPS & ARTISTS	4	2	2	4	3	-25.0%
	MOTION PICTURE EQUIPMENT RENTAL	19	14	20	20	24	26.3%
	OTHER SOUND RECORDING INDUSTRIES	12	6	8	8	6	-50.0%
	SOUND RECORDING STUDIOS	13	10	13	12	10	-23.1%
	TALENT PAYMENT SERVICES	19	19	20	19	23	21.1%
	TELEVISION BROADCASTING	14	12	13	12	9	-35.7%
	WARDROBE RENTAL	27	27	27	18	19	-29.6%
North Central Total		397	350	377	372	393	-1.0%
Percentage Change			-11.8%	7.7%	-1.3%	5.6%	
Northeast	ADVERTISING AGENCIES	152	143	149	162	159	4.6%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	11	7	6	7	6	-45.5%
	AUDIO & VIDEO MEDIA REPRODUCTION	8	12	13	13	11	37.5%
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	14	22	30	30	32	128.6%
	COMMERCIAL PHOTOGRAPHY	103	109	117	121	111	7.8%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	136	152	170	160	157	15.4%
	MOTION PICTURE & VIDEO DISTRIBUTION	1	2	1	1	1	0.0%
	MOTION PICTURE & VIDEO PRODUCTION	84	94	99	102	95	13.1%
	MUSICAL GROUPS & ARTISTS	17	15	17	14	16	-5.9%
	MOTION PICTURE EQUIPMENT RENTAL	67	65	65	61	54	-19.4%
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	1	1	1	1	1	0.0%
	OTHER SOUND RECORDING INDUSTRIES	24	21	18	19	21	-12.5%
	SOUND RECORDING STUDIOS	26	35	38	43	25	-3.8%
	TALENT PAYMENT SERVICES	25	32	37	36	36	44.0%
	TELEVISION BROADCASTING	18	13	13	11	16	-11.1%
	WARDROBE RENTAL	30	29	28	29	32	6.7%
Northeast Total		717	752	802	810	773	7.8%
Percentage Change			4.9%	6.6%	1.0%	-4.6%	
Northwest	ADVERTISING AGENCIES	188	182	180	167	172	-8.5%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	5	1	1	-	2	-60.0%
	AUDIO & VIDEO MEDIA REPRODUCTION	5	6	4	2	2	-60.0%
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	39	38	39	38	42	7.7%
	COMMERCIAL PHOTOGRAPHY	120	116	124	107	96	-20.0%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	120	115	104	136	151	25.8%
	MOTION PICTURE & VIDEO PRODUCTION	74	76	78	73	71	-4.1%
	MUSICAL GROUPS & ARTISTS	16	18	18	19	19	18.8%
	MOTION PICTURE EQUIPMENT RENTAL	49	46	54	55	58	18.4%
	OTHER SOUND RECORDING INDUSTRIES	25	27	26	21	25	0.0%
	SOUND RECORDING STUDIOS	34	38	34	33	37	8.8%
	TALENT PAYMENT SERVICES	31	37	44	51	57	83.9%
	TELEVISION BROADCASTING	37	48	41	47	42	13.5%
	WARDROBE RENTAL	55	48	48	44	42	-23.6%
	Northwest Total		798	796	795	793	816
Percentage Change			-0.3%	-0.1%	-0.3%	2.9%	

ESTABLISHMENTS		Year					2003-07
Region	NAICS CODE DESCRIPTION	2003	2004	2005	2006	2007	% change
South Central	ADVERTISING AGENCIES	9	9	10	9	6	-33.3%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	-	-	1	1	1	N/C
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	6	5	6	5	7	16.7%
	COMMERCIAL PHOTOGRAPHY	5	3	8	7	8	60.0%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	8	7	8	7	8	0.0%
	MOTION PICTURE & VIDEO PRODUCTION	4	3	3	1	3	-25.0%
	MUSICAL GROUPS & ARTISTS	1	2	2	-	-	-100.0%
	MOTION PICTURE EQUIPMENT RENTAL	6	4	5	6	6	0.0%
	OTHER SOUND RECORDING INDUSTRIES	4	3	3	4	3	-25.0%
	SOUND RECORDING STUDIOS	2	2	3	3	1	-50.0%
	TALENT PAYMENT SERVICES	4	5	5	7	6	50.0%
	TELEVISION BROADCASTING	1	2		1	1	0.0%
	WARDROBE RENTAL	6	6	6	7	3	-50.0%
South Central Total		56	51	60	58	53	-5.4%
Percentage Change			-8.9%	17.6%	-3.3%	-8.6%	
Southwest	ADVERTISING AGENCIES	111	127	123	141	134	20.7%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	8	8	11	10	10	25.0%
	AUDIO & VIDEO MEDIA REPRODUCTION	7	8	3	2	3	-57.1%
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	19	23	29	21	35	84.2%
	COMMERCIAL PHOTOGRAPHY	68	62	61	60	64	-5.9%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	124	132	142	147	147	18.5%
	MOTION PICTURE & VIDEO PRODUCTION	69	72	68	68	74	7.2%
	MUSICAL GROUPS & ARTISTS	14	14	13	16	15	7.1%
	MOTION PICTURE EQUIPMENT RENTAL	49	49	50	44	36	-26.5%
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	-	1	1	1	1	N/C
	OTHER SOUND RECORDING INDUSTRIES	18	15	16	13	16	-11.1%
	SOUND RECORDING STUDIOS	18	15	15	20	17	-5.6%
	TALENT PAYMENT SERVICES	30	31	29	39	38	26.7%
TELEVISION BROADCASTING	30	30	28	26	24	-20.0%	
WARDROBE RENTAL	22	21	19	22	18	-18.2%	
Southwest Total		587	608	608	630	632	7.7%
Percentage Change			3.6%	0.0%	3.6%	0.3%	
Southeast	ADVERTISING AGENCIES	795	795	796	812	802	0.9%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	103	87	91	110	96	-6.8%
	AUDIO & VIDEO MEDIA REPRODUCTION	71	60	63	58	55	-22.5%
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	105	106	105	105	120	14.3%
	COMMERCIAL PHOTOGRAPHY	488	451	441	399	413	-15.4%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	669	626	637	698	665	-0.6%
	MOTION PICTURE & VIDEO DISTRIBUTION	29	27	23	21	21	-27.6%
	MOTION PICTURE & VIDEO PRODUCTION	613	567	607	599	588	-4.1%
	MUSICAL GROUPS & ARTISTS	157	136	133	126	118	-24.8%
	MOTION PICTURE EQUIPMENT RENTAL	222	228	225	210	210	-5.4%
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	10	12	15	11	9	-10.0%
	OTHER SOUND RECORDING INDUSTRIES	114	100	107	99	83	-27.2%
	SOUND RECORDING STUDIOS	296	272	256	238	227	-23.3%
	TALENT PAYMENT SERVICES	68	65	82	82	83	22.1%
	TELEPRODUCTION & POSTPRODUCTION SVCS	4	4	4	3	7	75.0%
	TELEVISION BROADCASTING	91	98	109	119	122	34.1%
WARDROBE RENTAL	156	150	150	134	126	-19.2%	
Southeast Total		3,991	3,784	3,844	3,824	3,745	-6.2%
Percentage Change			-5.2%	1.6%	-0.5%	-2.1%	
Tampa Bay	ADVERTISING AGENCIES	446	437	447	447	428	-4.0%
	AGENTS & MANAGERS FOR PUBLIC FIGURES	24	21	17	16	13	-45.8%
	AUDIO & VIDEO MEDIA REPRODUCTION	17	24	26	25	16	-5.9%
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	100	74	69	87	79	-21.0%
	COMMERCIAL PHOTOGRAPHY	230	233	234	223	201	-12.6%
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	373	377	388	403	394	5.6%
	MOTION PICTURE & VIDEO DISTRIBUTION	-	-	-	1	1	NC
	MOTION PICTURE & VIDEO PRODUCTION	247	242	244	104	103	-58.3%
	MUSICAL GROUPS & ARTISTS	22	26	27	25	22	0.0%
	MOTION PICTURE EQUIPMENT RENTAL	147	142	151	131	128	-12.9%
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	2	2	3	2	2	0.0%
	OTHER SOUND RECORDING INDUSTRIES	38	43	44	50	47	23.7%
	SOUND RECORDING STUDIOS	94	81	89	87	84	-10.6%
	TALENT PAYMENT SERVICES	91	91	92	101	107	17.6%
	TELEPRODUCTION & POSTPRODUCTION SVCS	1	1	11	136	129	12800.0%
	TELEVISION BROADCASTING	40	46	43	46	47	17.5%
WARDROBE RENTAL	90	85	78	65	65	-27.8%	
Tampa Bay Total		1,962	1,925	1,963	1,949	1,866	-4.9%
Percentage Change			-1.9%	2.0%	-0.7%	-4.3%	

Table 10 shows the revenues for these establishments broken out by region. In 2007, the Southeast region accounted for 41 percent of the total Film and Entertainment Industry revenues in the state.

Table 10 – Revenues by Region

REVENUE		Year				
Region	NAICS CODE DESCRIPTION	2003	2004	2005	2006	2007
East Central	ADVERTISING AGENCIES	\$ 698,493,000	\$ 597,167,000	\$ 505,278,000	\$ 614,037,000	\$ 670,878,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 13,261,000	\$ 11,942,000	\$ 8,491,000	\$ 15,238,000	\$ 18,969,000
	AUDIO & VIDEO MEDIA REPRODUCTION	\$ 15,083,000	\$ 8,677,000	\$ 6,568,000	\$ 25,291,000	\$ 22,407,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 498,479,000	\$ 323,331,000	\$ 379,356,000	\$ 1,124,387,000	\$ 711,674,000
	COMMERCIAL PHOTOGRAPHY	\$ 106,258,000	\$ 85,664,000	\$ 70,736,000	\$ 98,748,000	\$ 99,685,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 211,359,000	\$ 183,779,000	\$ 265,096,000	\$ 354,252,000	\$ 357,869,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 730,724,000	\$ 655,958,000	\$ 708,702,000	\$ 790,416,000	\$ 531,598,000
	MUSICAL GROUPS & ARTISTS	\$ 57,860,000	\$ 64,680,000	\$ 52,580,000	\$ 58,520,000	\$ 61,600,000
	MOTION PICTURE EQUIPMENT RENTAL	\$ 555,853,000	\$ 820,827,000	\$ 794,637,000	\$ 610,506,000	\$ 408,925,000
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	\$ 522,000	\$ 1,131,000	\$ 1,305,000	\$ 6,171,000	\$ 6,171,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 58,474,000	\$ 72,163,000	\$ 46,958,000	\$ 49,130,000	\$ 44,874,000
	SOUND RECORDING STUDIOS	\$ 64,100,000	\$ 66,316,000	\$ 103,803,000	\$ 165,136,000	\$ 164,654,000
	TALENT PAYMENT SERVICES	\$ 31,456,000	\$ 33,306,000	\$ 50,890,000	\$ 66,622,000	\$ 71,219,000
	TELEPRODUCTION & POSTPRODUCTION SVCS	\$ 1,150,000	\$ 976,000	\$ 1,411,000	\$ 1,324,000	\$ 2,002,000
	TELEVISION BROADCASTING	\$ 715,431,000	\$ 858,715,000	\$ 934,362,000	\$ 1,041,374,000	\$ 1,141,017,000
WARDROBE RENTAL	\$ 30,039,000	\$ 32,686,000	\$ 36,518,000	\$ 50,117,000	\$ 49,450,000	
East Central Total		\$ 3,758,503,000	\$ 3,784,632,000	\$ 3,930,173,000	\$ 5,021,152,000	\$ 4,313,542,000
Percentage Change			0.7%	3.8%	27.8%	-14.1%
North Central	ADVERTISING AGENCIES	\$ 139,362,000	\$ 110,896,000	\$ 114,427,000	\$ 140,592,000	\$ 163,563,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 987,000	\$ 705,000	\$ 564,000	\$ 1,580,000	\$ 2,212,000
	AUDIO & VIDEO MEDIA REPRODUCTION	\$ 1,611,000	\$ 1,512,000	\$ 500,000	\$ 650,000	\$ 1,148,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 121,549,000	\$ 90,784,000	\$ 108,725,000	\$ 265,674,000	\$ 250,338,000
	COMMERCIAL PHOTOGRAPHY	\$ 18,066,000	\$ 21,352,000	\$ 22,149,000	\$ 29,691,000	\$ 35,411,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 25,311,000	\$ 26,450,000	\$ 26,216,000	\$ 25,882,000	\$ 32,459,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 30,230,000	\$ 28,155,000	\$ 30,723,000	\$ 31,788,000	\$ 30,111,000
	MUSICAL GROUPS & ARTISTS	\$ 3,300,000	\$ 880,000	\$ 880,000	\$ 1,100,000	\$ 660,000
	MOTION PICTURE EQUIPMENT RENTAL	\$ 39,412,000	\$ 34,378,000	\$ 58,350,000	\$ 58,238,000	\$ 67,617,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 2,294,000	\$ 1,570,000	\$ 1,880,000	\$ 6,298,000	\$ 10,663,000
	SOUND RECORDING STUDIOS	\$ 7,708,000	\$ 7,020,000	\$ 2,884,000	\$ 7,024,000	\$ 6,040,000
	TALENT PAYMENT SERVICES	\$ 4,691,000	\$ 5,306,000	\$ 7,402,000	\$ 5,512,000	\$ 7,388,000
	TELEVISION BROADCASTING	\$ 106,492,000	\$ 97,328,000	\$ 102,068,000	\$ 111,631,000	\$ 104,377,000
	WARDROBE RENTAL	\$ 9,025,000	\$ 10,531,000	\$ 10,194,000	\$ 8,758,000	\$ 8,876,000
	North Central Total		\$ 501,013,000	\$ 426,336,000	\$ 476,768,000	\$ 685,660,000
Percentage Change			-14.9%	11.8%	43.8%	3.8%
Northeast	ADVERTISING AGENCIES	\$ 366,340,000	\$ 350,233,000	\$ 320,282,000	\$ 434,264,000	\$ 497,906,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 16,916,000	\$ 13,667,000	\$ 13,244,000	\$ 29,970,000	\$ 29,022,000
	AUDIO & VIDEO MEDIA REPRODUCTION	\$ 2,567,000	\$ 3,520,000	\$ 3,868,000	\$ 7,292,000	\$ 5,310,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 43,860,000	\$ 42,961,000	\$ 76,044,000	\$ 137,773,000	\$ 278,100,000
	COMMERCIAL PHOTOGRAPHY	\$ 28,690,000	\$ 33,438,000	\$ 34,148,000	\$ 45,266,000	\$ 50,937,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 91,563,000	\$ 109,322,000	\$ 122,326,000	\$ 126,381,000	\$ 121,815,000
	MOTION PICTURE & VIDEO DISTRIBUTION	\$ 5,705,000	\$ 10,269,000	\$ 5,705,000	\$ 2,345,000	\$ 2,345,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 105,129,000	\$ 141,868,000	\$ 136,152,000	\$ 149,195,000	\$ 137,251,000
	MUSICAL GROUPS & ARTISTS	\$ 13,075,000	\$ 7,495,000	\$ 11,755,000	\$ 8,970,000	\$ 11,623,000
	MOTION PICTURE EQUIPMENT RENTAL	\$ 201,958,000	\$ 168,672,000	\$ 189,817,000	\$ 213,717,000	\$ 258,922,000
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	\$ 2,376,000	\$ 2,376,000	\$ 2,574,000	\$ 2,574,000	\$ 726,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 11,638,000	\$ 11,256,000	\$ 10,186,000	\$ 10,218,000	\$ 10,540,000
	SOUND RECORDING STUDIOS	\$ 5,716,000	\$ 9,006,000	\$ 9,006,000	\$ 15,488,000	\$ 8,816,000
	TALENT PAYMENT SERVICES	\$ 13,905,000	\$ 21,726,000	\$ 29,291,000	\$ 27,142,000	\$ 22,620,000
	TELEVISION BROADCASTING	\$ 324,570,000	\$ 298,680,000	\$ 304,684,000	\$ 370,572,000	\$ 398,782,000
WARDROBE RENTAL	\$ 11,101,000	\$ 12,247,000	\$ 14,769,000	\$ 21,000,000	\$ 21,336,000	
Northeast Total		\$ 1,234,008,000	\$ 1,224,489,000	\$ 1,269,082,000	\$ 1,581,167,000	\$ 1,834,715,000
Percentage Change			-0.8%	3.6%	24.6%	16.0%
Northwest	ADVERTISING AGENCIES	\$ 292,282,000	\$ 282,183,000	\$ 296,552,000	\$ 334,363,000	\$ 362,768,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 2,236,000	\$ 423,000	\$ 564,000	\$ -	\$ 1,264,000
	AUDIO & VIDEO MEDIA REPRODUCTION	\$ 6,987,000	\$ 7,169,000	\$ 5,645,000	\$ 2,781,000	\$ 1,267,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 241,775,000	\$ 279,189,000	\$ 409,966,000	\$ 1,127,198,000	\$ 886,237,000
	COMMERCIAL PHOTOGRAPHY	\$ 35,207,000	\$ 35,846,000	\$ 37,030,000	\$ 43,440,000	\$ 38,457,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 60,943,000	\$ 49,385,000	\$ 74,478,000	\$ 120,284,000	\$ 146,321,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 63,718,000	\$ 67,494,000	\$ 67,195,000	\$ 62,297,000	\$ 64,103,000
	MUSICAL GROUPS & ARTISTS	\$ 7,440,000	\$ 13,640,000	\$ 13,848,000	\$ 18,070,000	\$ 11,690,000
	MOTION PICTURE EQUIPMENT RENTAL	\$ 192,559,000	\$ 219,713,000	\$ 197,954,000	\$ 224,658,000	\$ 227,400,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 9,078,000	\$ 12,352,000	\$ 11,616,000	\$ 10,570,000	\$ 13,296,000
	SOUND RECORDING STUDIOS	\$ 9,212,000	\$ 14,498,000	\$ 14,356,000	\$ 11,520,000	\$ 12,160,000
	TALENT PAYMENT SERVICES	\$ 56,249,000	\$ 68,086,000	\$ 70,403,000	\$ 73,486,000	\$ 81,204,000
	TELEVISION BROADCASTING	\$ 364,071,000	\$ 437,269,000	\$ 280,241,000	\$ 382,825,000	\$ 397,313,000
	WARDROBE RENTAL	\$ 17,136,000	\$ 14,713,000	\$ 16,101,000	\$ 21,685,000	\$ 21,172,000
	Northwest Total		\$ 1,358,893,000	\$ 1,501,960,000	\$ 1,495,949,000	\$ 2,433,177,000
Percentage Change			10.5%	-0.4%	62.7%	-6.9%

Region	NAICS CODE DESCRIPTION	Year				
		2003	2004	2005	2006	2007
South Central	ADVERTISING AGENCIES	\$ 30,856,000	\$ 22,038,000	\$ 34,688,000	\$ 45,140,000	\$ 26,664,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ -	\$ -	\$ 564,000	\$ 316,000	\$ 316,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 10,073,000	\$ 8,868,000	\$ 11,532,000	\$ 25,933,000	\$ 41,015,000
	COMMERCIAL PHOTOGRAPHY	\$ 1,254,000	\$ 917,000	\$ 1,965,000	\$ 1,548,000	\$ 1,720,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 2,348,000	\$ 1,980,000	\$ 1,980,000	\$ 1,693,000	\$ 1,951,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 2,032,000	\$ 1,404,000	\$ 1,404,000	\$ 314,000	\$ 2,512,000
	MUSICAL GROUPS & ARTISTS	\$ 660,000	\$ 880,000	\$ 880,000	\$ -	\$ -
	MOTION PICTURE EQUIPMENT RENTAL	\$ 27,014,000	\$ 7,498,000	\$ 9,694,000	\$ 13,097,000	\$ 23,492,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 376,000	\$ 282,000	\$ 282,000	\$ 470,000	\$ 514,000
	SOUND RECORDING STUDIOS	\$ 282,000	\$ 282,000	\$ 942,000	\$ 820,000	\$ 164,000
	TALENT PAYMENT SERVICES	\$ 1,228,000	\$ 5,788,000	\$ 5,788,000	\$ 8,262,000	\$ 8,231,000
	TELEVISION BROADCASTING	\$ 632,000	\$ 5,688,000	\$ -	\$ 5,239,000	\$ 5,239,000
	WARDROBE RENTAL	\$ 1,135,000	\$ 1,081,000	\$ 1,251,000	\$ 2,025,000	\$ 606,000
	South Central Total		\$ 76,755,000	\$ 55,625,000	\$ 69,719,000	\$ 102,832,000
Percentage Change			-27.5%	25.3%	47.5%	8.7%
Southwest	ADVERTISING AGENCIES	\$ 144,930,000	\$ 148,139,000	\$ 181,983,000	\$ 284,114,000	\$ 234,357,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 3,807,000	\$ 4,061,000	\$ 4,997,000	\$ 9,730,000	\$ 9,414,000
	AUDIO & VIDEO MEDIA REPRODUCTION	\$ 2,572,000	\$ 3,959,000	\$ 462,000	\$ 498,000	\$ 1,341,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 92,643,000	\$ 148,941,000	\$ 148,171,000	\$ 363,058,000	\$ 385,773,000
	COMMERCIAL PHOTOGRAPHY	\$ 18,297,000	\$ 15,423,000	\$ 18,686,000	\$ 13,808,000	\$ 14,709,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 74,562,000	\$ 75,414,000	\$ 80,194,000	\$ 69,376,000	\$ 70,696,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 47,649,000	\$ 47,081,000	\$ 50,579,000	\$ 64,519,000	\$ 79,740,000
	MUSICAL GROUPS & ARTISTS	\$ 6,160,000	\$ 50,160,000	\$ 49,940,000	\$ 37,470,000	\$ 36,810,000
	MOTION PICTURE EQUIPMENT RENTAL	\$ 145,699,000	\$ 156,543,000	\$ 151,722,000	\$ 139,260,000	\$ 143,702,000
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	\$ -	\$ 174,000	\$ 174,000	\$ 726,000	\$ 726,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 17,078,000	\$ 17,078,000	\$ 8,836,000	\$ 8,460,000	\$ 30,641,000
	SOUND RECORDING STUDIOS	\$ 9,016,000	\$ 4,984,000	\$ 5,078,000	\$ 13,960,000	\$ 12,714,000
	TALENT PAYMENT SERVICES	\$ 11,769,000	\$ 10,886,000	\$ 15,544,000	\$ 18,717,000	\$ 26,549,000
	TELEVISION BROADCASTING	\$ 401,910,000	\$ 351,034,000	\$ 348,062,000	\$ 444,962,000	\$ 134,367,000
WARDROBE RENTAL	\$ 8,590,000	\$ 8,502,000	\$ 8,401,000	\$ 13,409,000	\$ 13,404,000	
Southwest Total		\$ 976,092,000	\$ 1,033,877,000	\$ 1,064,428,000	\$ 1,468,658,000	\$ 1,181,539,000
Percentage Change			5.9%	3.0%	38.0%	-19.5%
Southeast	ADVERTISING AGENCIES	\$ 1,868,713,000	\$ 1,807,912,000	\$ 1,938,039,000	\$ 2,538,038,000	\$ 2,408,323,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 67,535,000	\$ 66,300,000	\$ 59,902,000	\$ 185,750,000	\$ 150,674,000
	AUDIO & VIDEO MEDIA REPRODUCTION	\$ 152,368,000	\$ 131,837,000	\$ 120,680,000	\$ 133,596,000	\$ 138,590,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 743,172,000	\$ 717,225,000	\$ 516,121,000	\$ 1,167,497,000	\$ 1,371,461,000
	COMMERCIAL PHOTOGRAPHY	\$ 152,455,000	\$ 135,091,000	\$ 118,430,000	\$ 123,811,000	\$ 134,750,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 511,007,000	\$ 570,721,000	\$ 606,258,000	\$ 846,746,000	\$ 734,900,000
	MOTION PICTURE & VIDEO DISTRIBUTION	\$ 168,231,000	\$ 139,706,000	\$ 86,079,000	\$ 40,803,000	\$ 52,997,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 766,980,000	\$ 713,642,000	\$ 741,675,000	\$ 764,793,000	\$ 880,346,000
	MUSICAL GROUPS & ARTISTS	\$ 99,297,000	\$ 92,080,000	\$ 109,300,000	\$ 115,902,000	\$ 123,602,000
	MOTION PICTURE EQUIPMENT RENTAL	\$ 1,416,766,000	\$ 2,331,570,000	\$ 2,183,211,000	\$ 1,737,625,000	\$ 1,618,361,000
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	\$ 4,300,000	\$ 8,351,000	\$ 15,306,000	\$ 47,401,000	\$ 49,005,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 72,054,000	\$ 73,530,000	\$ 59,977,000	\$ 46,841,000	\$ 47,041,000
	SOUND RECORDING STUDIOS	\$ 571,059,000	\$ 575,808,000	\$ 578,851,000	\$ 998,305,000	\$ 1,009,012,000
	TALENT PAYMENT SERVICES	\$ 63,894,000	\$ 62,649,000	\$ 72,864,000	\$ 58,833,000	\$ 132,959,000
TELEPRODUCTION & POSTPRODUCTION SVCS	\$ 1,131,000	\$ 1,479,000	\$ 2,523,000	\$ 1,914,000	\$ 3,219,000	
TELEVISION BROADCASTING	\$ 1,741,097,000	\$ 1,513,751,000	\$ 2,035,816,000	\$ 2,465,107,000	\$ 2,863,508,000	
WARDROBE RENTAL	\$ 60,555,000	\$ 59,284,000	\$ 60,345,000	\$ 77,356,000	\$ 73,310,000	
Southeast Total		\$ 8,400,059,000	\$ 8,941,652,000	\$ 9,245,032,000	\$ 11,272,962,000	\$ 11,718,748,000
Percentage Change			6.4%	3.4%	21.9%	4.0%
Tampa Bay	ADVERTISING AGENCIES	\$ 1,136,514,000	\$ 1,414,085,000	\$ 1,147,913,000	\$ 1,332,989,000	\$ 1,714,111,000
	AGENTS & MANAGERS FOR PUBLIC FIGURES	\$ 10,619,000	\$ 11,954,000	\$ 23,756,000	\$ 29,087,000	\$ 27,667,000
	AUDIO & VIDEO MEDIA REPRODUCTION	\$ 18,369,000	\$ 21,994,000	\$ 21,025,000	\$ 34,600,000	\$ 26,112,000
	CABLE & OTHER SUBSCRIPTION PROGRAMMING	\$ 452,549,000	\$ 392,724,000	\$ 355,761,000	\$ 614,594,000	\$ 873,566,000
	COMMERCIAL PHOTOGRAPHY	\$ 65,661,000	\$ 67,372,000	\$ 60,574,000	\$ 283,036,000	\$ 66,302,000
	INDEPENDENT ARTISTS, WRITERS, & PERFORMERS	\$ 201,700,000	\$ 214,129,000	\$ 266,803,000	\$ 535,203,000	\$ 324,870,000
	MOTION PICTURE & VIDEO DISTRIBUTION	\$ -	\$ -	\$ -	\$ 1,407,000	\$ 1,407,000
	MOTION PICTURE & VIDEO PRODUCTION	\$ 217,554,000	\$ 224,375,000	\$ 230,618,000	\$ 96,929,000	\$ 105,859,000
	MUSICAL GROUPS & ARTISTS	\$ 45,540,000	\$ 68,650,000	\$ 69,262,000	\$ 68,640,000	\$ 68,390,000
	MOTION PICTURE EQUIPMENT RENTAL	\$ 522,227,000	\$ 1,048,667,000	\$ 989,888,000	\$ 568,223,000	\$ 507,117,000
	OTHER MOTION PICTURE & VIDEO INDUSTRIES	\$ 1,497,000	\$ 2,202,000	\$ 1,845,000	\$ 2,688,000	\$ 2,643,000
	OTHER SOUND RECORDING INDUSTRIES	\$ 24,344,000	\$ 28,933,000	\$ 62,476,000	\$ 40,056,000	\$ 34,567,000
	SOUND RECORDING STUDIOS	\$ 34,061,000	\$ 29,423,000	\$ 30,833,000	\$ 42,475,000	\$ 49,213,000
	TALENT PAYMENT SERVICES	\$ 63,218,000	\$ 68,084,000	\$ 69,405,000	\$ 74,315,000	\$ 93,444,000
TELEPRODUCTION & POSTPRODUCTION SVCS	\$ 348,000	\$ 348,000	\$ 3,568,000	\$ 41,621,000	\$ 34,008,000	
TELEVISION BROADCASTING	\$ 676,661,000	\$ 916,817,000	\$ 761,661,000	\$ 959,806,000	\$ 868,564,000	
WARDROBE RENTAL	\$ 31,681,000	\$ 32,100,000	\$ 26,273,000	\$ 22,639,000	\$ 23,521,000	
Tampa Bay Total		\$ 3,470,862,000	\$ 4,509,757,000	\$ 4,095,388,000	\$ 4,725,669,000	\$ 4,797,840,000
Percentage Change			29.9%	-9.2%	15.4%	1.5%

A comparison with other states' employment and establishment numbers in NAICS Code 512 (Motion Picture and Sound Recording), including state rankings for 2002 and 2006, can be found in Appendix C.

Taxes

In order to estimate the taxes paid by the establishments in the Florida Film and Entertainment Industry, IMPLAN modeling software was used. The IMPLAN input-output system allows users to build economic models to estimate the impacts of economic changes in their states, counties, or communities. The IMPLAN tool also generates an estimate of the tax impact on the state and local areas in three categories: corporate, business, and personal taxes. The estimate includes tax revenue and other forms of government revenue such as vehicle license fees and fines. Revenue estimates for the different industry sectors were entered into the model in order to generate an estimate of state and local taxes paid as a result of the existence of that industry within the state of Florida. The industry wide results of this analysis are displayed in Table 11. Estimated tax payments by Florida Film and Entertainment Industry establishments were nearly \$708 million in the 5-year period analyzed.

Table 11 – State and Local Taxes

State and Local Taxes	2003	2004	2005	2006	2007
Corporate Profits Tax	\$ 5,387,198	\$ 5,083,320	\$ 5,023,089	\$ 5,310,144	\$ 4,922,565
Dividends	\$ 9,492,645	\$ 8,957,189	\$ 8,851,059	\$ 9,356,871	\$ 8,673,927
Indirect Bus Tax: Motor Vehicle License	\$ 962,167	\$ 907,893	\$ 897,136	\$ 948,405	\$ 879,182
Indirect Bus Tax: Other Taxes	\$ 13,364,039	\$ 12,610,208	\$ 12,460,794	\$ 13,172,892	\$ 12,211,423
Indirect Bus Tax: Property Tax	\$ 42,115,934	\$ 39,740,283	\$ 39,269,415	\$ 41,513,547	\$ 38,483,537
Indirect Bus Tax: S/L NonTaxes	\$ 5,361,242	\$ 5,058,828	\$ 4,998,888	\$ 5,284,560	\$ 4,898,848
Indirect Bus Tax: Sales Tax	\$ 58,630,126	\$ 55,322,952	\$ 54,667,450	\$ 57,791,535	\$ 53,573,420
Indirect Bus Tax: Severance Tax	\$ 138,500	\$ 130,687	\$ 129,139	\$ 136,519	\$ 126,554
Personal Tax: Motor Vehicle License	\$ 2,061,856	\$ 1,945,552	\$ 1,922,499	\$ 2,032,365	\$ 1,884,025
Personal Tax: NonTaxes (Fines- Fees)	\$ 6,884,052	\$ 6,495,740	\$ 6,418,774	\$ 6,785,589	\$ 6,290,319
Personal Tax: Other Tax (Fish/Hunt)	\$ 124,689	\$ 117,656	\$ 116,262	\$ 122,906	\$ 113,935
Personal Tax: Property Taxes	\$ 892,632	\$ 842,281	\$ 832,302	\$ 879,865	\$ 815,645
Social Ins Tax- Employee Contribution	\$ 565,033	\$ 533,161	\$ 526,844	\$ 556,951	\$ 516,300
Social Ins Tax- Employer Contribution	\$ 2,260,893	\$ 2,133,362	\$ 2,108,085	\$ 2,228,556	\$ 2,065,897
Total	\$ 148,241,006	\$ 139,879,112	\$ 138,221,736	\$ 146,120,705	\$ 135,455,577

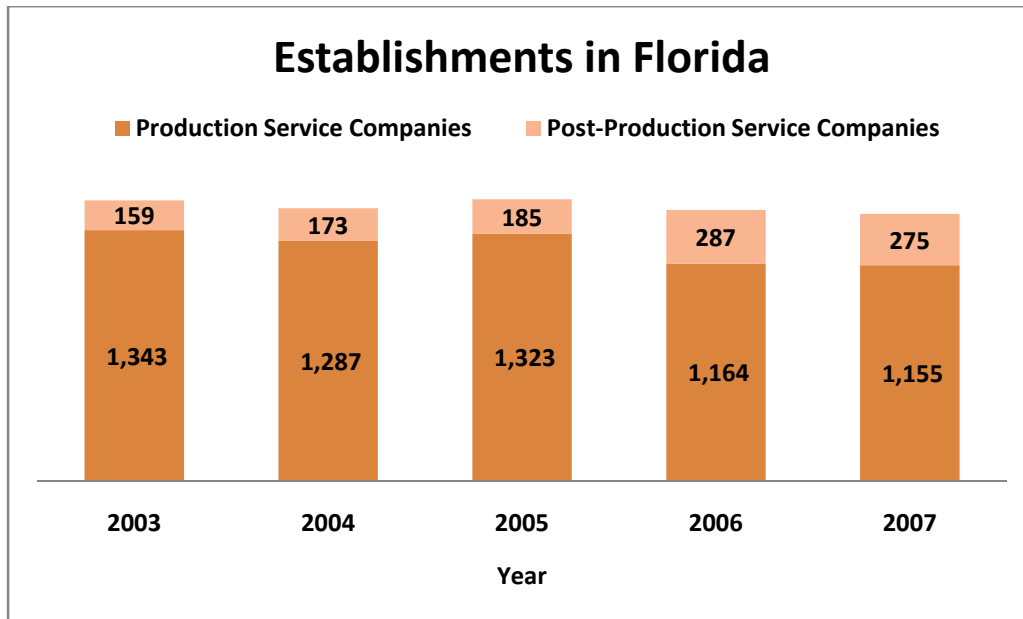
Source: IMPLAN

The IMPLAN values are based on the average for all industries within the model and the average taxes associated with each household income class. These tax estimates represent gross estimates and do not reflect the sales tax exemption granted to production companies working on locations within the state.

Production and Post-Production Service Companies

Although studios and other production companies are responsible for financing, producing, publicizing, and distributing a film or program, the actual making of the film often is done by hundreds of small businesses and independent contractors hired by the studios on an as-needed basis. These companies provide a wide range of services, such as equipment rental, lighting, special effects, set construction, and costume design, as well as much of the creative and technical talent that go into producing a film. The industry also contracts with a large number of workers in other industries that supply support services to the crews while they are filming, such as truck drivers, caterers, electricians, and makeup artists. Figure 5 shows the number of production and post-production companies located in Florida from 2003-2007.

Figure 5 – Florida Production and Post-Production Establishments 2003-2007



While the number of production service companies declined statewide by 14 percent between 2003 and 2007, the number of post-production service companies increased 73 percent. Figure 6 shows the revenues earned by these companies in the same time period. Revenues for production service companies declined nearly 15 percent while post-production service company revenues more than doubled, growing by 118 percent.

Figure 6 – Revenues for Florida Production and Post-Production Companies 2003-2007

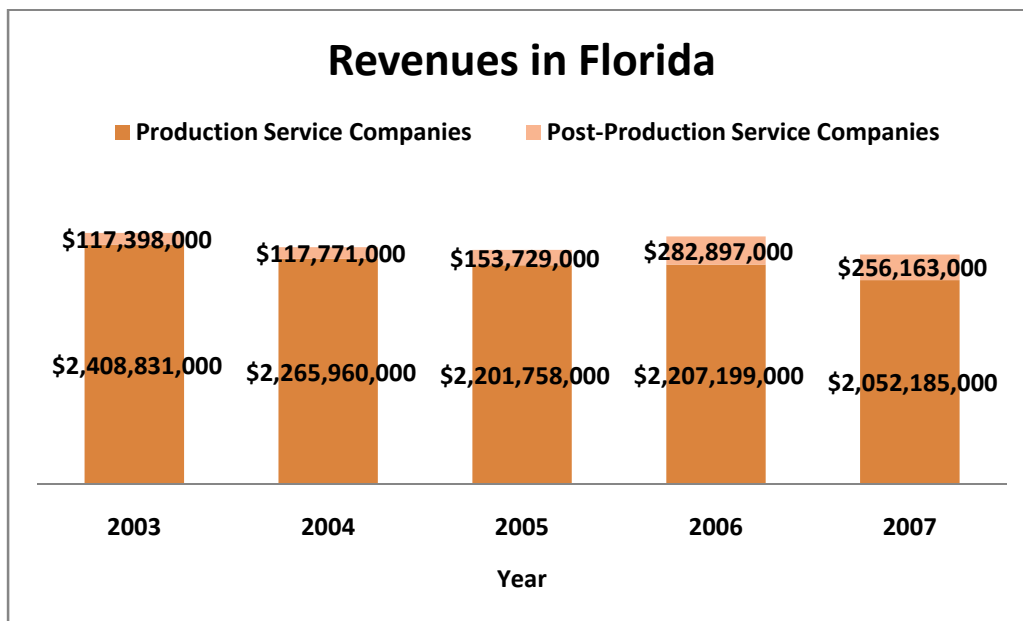


Figure 7 shows the total number of production service companies by region from 2003 to 2007. Figure 8 shows the same information for post-production service companies.

Figure 7 – Florida Production Service Companies 2003-07 by Region

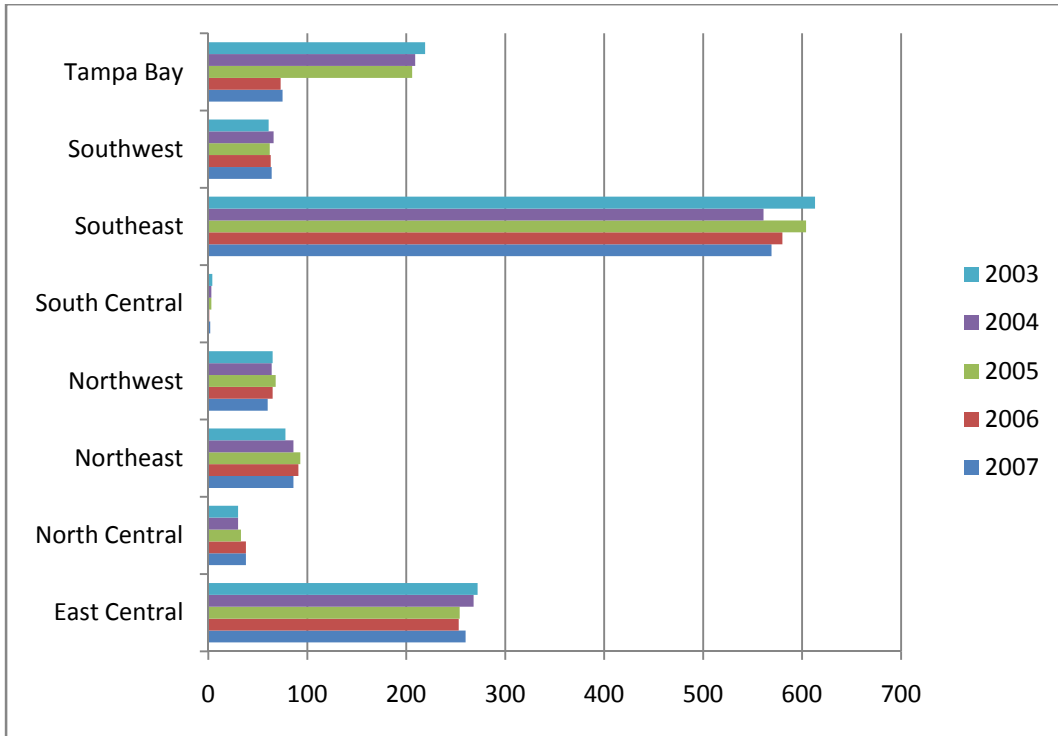


Figure 8 – Florida Post-Production Service Companies 2003-07 by Region

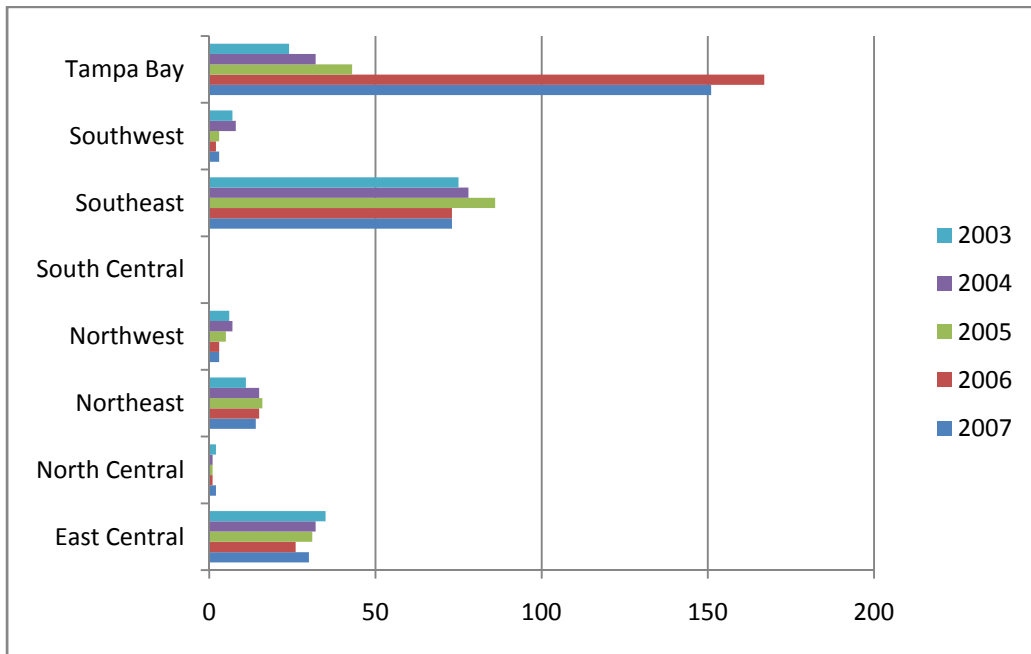


Figure 9 shows the revenues for Florida production service companies from 2003 to 2007 by region, while Figure 10 shows the same for post-production service companies.

Figure 9 – Revenues for Florida Production Service Companies 2003-07 by Region

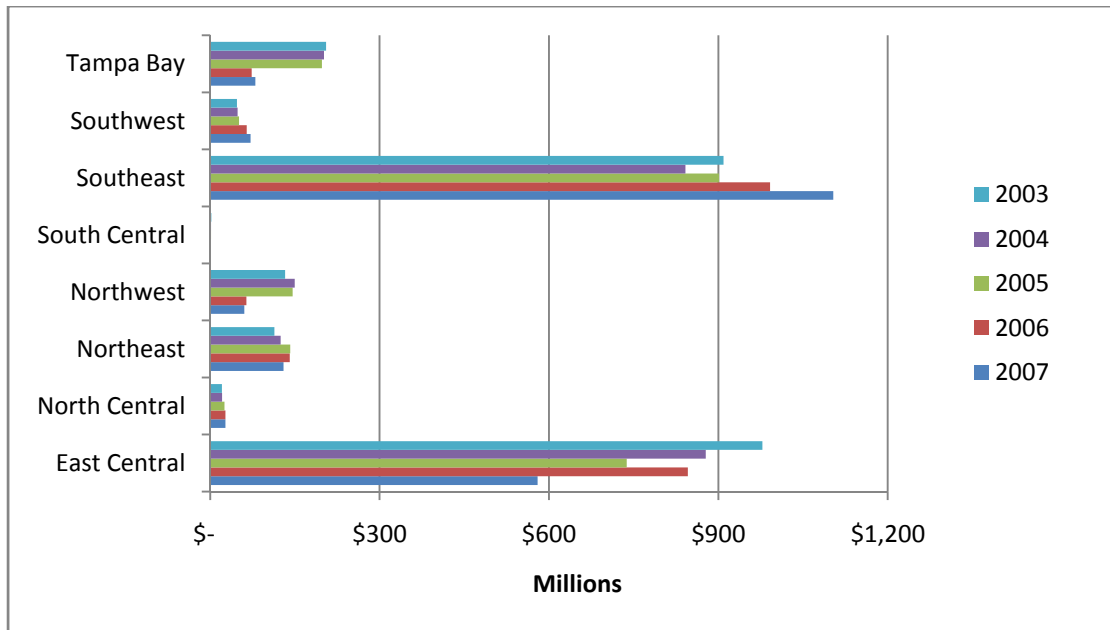
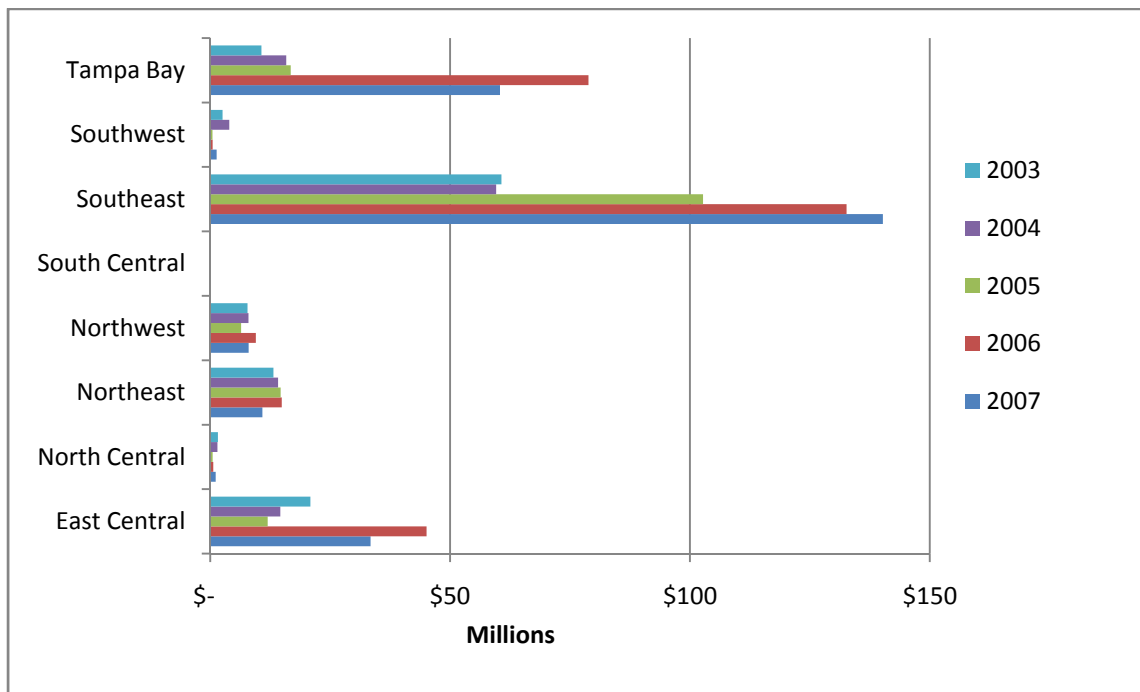


Figure 10 – Revenues for Florida Post-Production Service Companies 2003-07 by Region



From 2003 to 2007, most Florida regions saw flat or declining revenues from production and post-production service companies, with some regions declining sharply. However, revenues grew during this time period by 45 percent in the Southwest and 28 percent in the Southeast. Detailed information utilizing SIC definitions for companies providing production and post-production services and showing

the number of these companies in the eight Florida regions from 2003 to 2007 can be found in Appendix D.

According to the Survey of Business Expenses conducted by the US Census Bureau, firms in the Motion Picture and Sound Recording industry spend approximately 5.1 percent of revenue on advertising and promotional services. Using this figure, it's estimated that production service companies spent over \$568 million from 2003 to 2007 on marketing and advertising. See Table 12.

Table 12 – Spending on Marketing and Advertising

Statewide Industry	2003	2004	2005	2006	2007
Production Services					
Businesses	1,343	1,287	1,323	1,164	1,155
Total Revenues	\$ 2,408,831,000	\$ 2,265,960,000	\$ 2,201,758,000	\$ 2,207,199,000	\$ 2,052,185,000
Est. Spending on Marketing and Advertising	\$ 122,850,381	\$ 115,563,960	\$ 112,289,658	\$ 112,567,149	\$ 104,661,435

Source: InfoUSA; Survey of Business Expenditures, US Census Bureau

Workforce Assessment

Of major importance in maintaining and further developing the Florida Film and Entertainment Industry is the quality and quantity of the state's industry workforce. Tables 13 and 14 show the changes in industry employment from 2003 to 2007 by NAICS code sector.

Table 13 – Florida Film and Entertainment Industry Employment 2003-07

NAICS Code	Description	2003 Jobs	2004 Jobs	2005 Jobs	2006 Jobs	2007 Jobs	% change 03-07
512110	Motion picture and video production	5,285	4,936	5,525	5,308	5,507	4.2%
512120	Motion picture and video distribution	213	171	170	182	215	0.9%
512191	Teleproduction and postproduction services	435	395	373	417	448	3.0%
512199	Other motion picture and video industries	300	85	98	76	77	-74.3%
512210	Record production	101	93	116	177	186	84.2%
512240	Sound recording studios	775	671	632	686	663	-14.5%
512290	Other sound recording industries	415	292	256	281	294	-29.2%
515120	Television broadcasting	9,336	9,670	9,534	9,293	9,536	2.1%
515210	Cable and other subscription programming	5,234	5,607	5,751	5,931	4,383	-16.3%
541810	Advertising agencies	13,157	16,530	16,295	16,108	16,369	24.4%
541922	Commercial photography	1,051	1,000	932	1,201	1,279	21.7%
711130	Musical groups and artists	2,448	2,475	2,540	2,855	2,850	16.4%
711510	Independent artists, writers, and performers	46,801	48,394	50,511	52,268	55,470	18.5%
Total		85,552	90,320	92,735	94,784	97,276	13.7%

Source: EMSI Complete Employment – Spring 2008 Release v. 2

Table 14 – Percentage Change Year over Year in Florida Film and Entertainment Industry Employment

Industry	Percent Employment Change Year over Year			
	2003-2004	2004-2005	2005-2006	2006-2007
Motion picture and video production	-7%	12%	-4%	4%
Motion picture and video distribution	-20%	-1%	7%	18%
Teleproduction and postproduction services	-9%	-6%	12%	7%
Other motion picture and video industries	-72%	15%	-22%	1%
Record production	-8%	25%	53%	5%
Sound recording studios	-13%	-6%	9%	-3%
Other sound recording industries	-30%	-12%	10%	5%
Television broadcasting	4%	-1%	-3%	3%
Cable and other subscription programming	7%	3%	3%	-26%
Advertising agencies	26%	-1%	-1%	2%
Commercial photography	-5%	-7%	29%	6%
Musical groups and artists	1%	3%	12%	0%
Independent artists, writers, and performers	3%	4%	3%	6%
Total	5.6%	2.7%	2.2%	2.6%

Source: EMSI Complete Employment – Spring 2008 Release v. 2

Between 2003 and 2007, the Florida Film and Entertainment Industry workforce grew nearly 14 percent, with most component industries seeing some growth in employment over the period.

Occupations

The Florida Film and Entertainment Industry employs workers in every major occupational group. The focus of this analysis will be on those professional and technical occupations that represent the core employment of the industry. These include the above-the-line (expenditures spent prior to production) talent positions such as writers, starring actors, and directors, as well as below-the-line production and post-production positions such as cast, director of photography, assistant directors, and other crew members. For 2007, the average annual wage for the Film and Entertainment Industry as defined was approximately \$57,700 in Florida. Employment in these occupations grew for the most part in Florida between 2002 and 2007, with declines being seen in camera operators, film and video editors, audio and video equipment technicians, and sound engineers. See Table 15.

Table 15 – Florida Film and Entertainment Industry Workforce by Occupation 2002-2007

Description	2002 Jobs	2007 Jobs	Change	% Change	Covered by Union Contract
Writers and authors	9,815	11,506	1,691	17%	7%
Musicians and singers	4,870	5,590	720	15%	13%
Music directors and composers	4,389	5,125	736	17%	13%
Photographers	2,998	3,389	391	13%	5%
Art directors	2,792	3,276	484	17%	NA
Multi-media artists and animators	2,739	3,215	476	17%	NA
Producers and directors	2,711	3,126	415	15%	20%
Artists and related workers, all other	2,702	3,185	483	18%	13%
Advertising sales agents	2,614	3,336	722	28%	3%

Entertainers and performers, sports and related workers, all other	2,089	2,486	397	19%	8%
Actors	2,060	2,428	368	18%	51%
Camera operators, television, video, and motion picture	1,602	1,385	(217)	(14%)	23%
Broadcast technicians	1,593	1,614	21	1%	14%
Public relations specialists	1,509	1,892	383	25%	0%
Film and video editors	1,182	980	(202)	(17%)	23%
Audio and video equipment technicians	946	931	(15)	(2%)	17%
Agents and business managers of artists, performers, and athletes	867	1,082	215	25%	0%
Editors	722	847	125	17%	10%
Graphic designers	684	874	190	28%	4%
Sound engineering technicians	644	608	(36)	(6%)	14%
Dancers	357	417	60	17%	19%

Source: EMSI Complete Employment – Spring 2008 Release v. 2; Union data from Barry T. Hirsch and David A. Macpherson (calculations from Current Population Survey data).

Participation in unions varies by occupation, although workers may be covered by a contract while not being union members. In Florida, the occupations most likely to be covered by union agreements include actors, producers and directors, camera operators, film and video editors, and dancers. See Table 15 above.

Table 16 shows the workforce by occupation by Florida region for the same time period.

Table 16 – Florida Film and Entertainment Industry Workforce by Region 2002-2007

East Central Region					
Description	2002 Jobs	2007 Jobs	Change	% Change	%
Writers and authors	1,804	2,204	400	22%	
Musicians and singers	899	1,033	134	15%	
Music directors and composers	803	964	161	20%	
Multi-media artists and animators	517	639	122	24%	
Art directors	509	625	116	23%	
Artists and related workers, all other	508	621	113	22%	
Photographers	477	583	106	22%	
Producers and directors	453	592	139	31%	
Entertainers and performers, sports and related workers, all other	386	468	82	21%	
Actors	380	462	82	22%	
Advertising sales agents	278	471	193	69%	
Audio and video equipment technicians	250	296	46	18%	
Public relations specialists	194	305	111	57%	
Sound engineering technicians	169	109	(60)	(35%)	
Camera operators, television, video, and motion picture	162	199	37	23%	
Agents and business managers of artists, performers, and athletes	148	186	38	26%	
Broadcast technicians	143	180	37	26%	
Editors	138	177	39	29%	
Media and communication workers, all other	124	167	43	35%	
Film and video editors	101	121	20	20%	

Graphic designers	87	136	49	56%
Dancers	73	79	6	8%
Animal trainers	62	75	13	20%

North Central Region

Description	2002 Jobs	2007 Jobs	Change	% Change
Writers and authors	301	367	66	22%
Musicians and singers	145	172	27	19%
Music directors and composers	136	166	30	22%
Photographers	90	109	19	21%
Art directors	86	104	18	22%
Multi-media artists and animators	83	101	18	21%
Artists and related workers, all other	82	100	18	21%
Entertainers and performers, sports and related workers, all other	64	80	16	26%
Actors	55	67	12	23%
Advertising sales agents	53	61	8	16%
Public relations specialists	48	55	7	14%
Producers and directors	44	67	23	54%
Agents and business managers of artists, performers, and athletes	39	56	17	41%
Graphic designers	34	39	5	14%
Editors	22	30	8	33%
Advertising and promotions managers	18	22	4	23%
Animal trainers	11	13	2	21%
Media and communication workers, all other	10	14	4	41%
Dancers	<10	12	--	--
Broadcast technicians	<10	14	--	--
Choreographers	<10	10	--	--
Camera operators, television, video, and motion picture	<10	<10	--	--

Northeast Region

Description	2002 Jobs	2007 Jobs	Change	% Change
Writers and authors	751	945	194	26%
Musicians and singers	417	471	54	13%
Music directors and composers	342	420	78	23%
Photographers	324	331	7	2%
Art directors	208	262	54	26%
Multi-media artists and animators	204	255	51	25%
Artists and related workers, all other	203	252	49	24%
Producers and directors	173	219	46	26%
Actors	170	205	35	20%
Advertising sales agents	162	306	144	89%
Entertainers and performers, sports and related workers, all other	151	184	33	22%
Agents and business managers of artists, performers, and athletes	81	100	19	22%
Broadcast technicians	80	94	14	17%
Public relations specialists	71	141	70	99%
Editors	54	67	13	25%
Camera operators, television, video, and motion picture	52	64	12	22%
Graphic designers	52	94	42	81%
Sound engineering technicians	39	44	5	15%
Audio and video equipment technicians	33	44	11	33%
Dancers	29	32	3	10%
Media and communication workers, all other	26	28	2	6%

Animal trainers	26	32	6	23%
Advertising and promotions managers	24	49	25	107%

Northwest Florida Region

Description	2002 Jobs	2007 Jobs	Change	% Change
Writers and authors	711	806	95	13%
Musicians and singers	343	382	39	11%
Music directors and composers	322	361	39	12%
Art directors	211	238	27	13%
Multi-media artists and animators	201	229	28	14%
Artists and related workers, all other	198	223	25	13%
Photographers	170	219	49	29%
Entertainers and performers, sports and related workers, all other	159	172	13	8%
Actors	145	172	27	19%
Producers and directors	114	186	72	63%
Advertising sales agents	92	149	57	63%
Public relations specialists	69	108	39	56%
Agents and business managers of artists, performers, and athletes	67	87	20	29%
Editors	41	51	10	26%
Broadcast technicians	34	142	108	320%
Graphic designers	32	46	14	43%
Camera operators, television, video, and motion picture	27	44	17	64%
Animal trainers	25	29	4	12%
Dancers	21	24	3	11%
Makeup artists, theatrical and performance	20	13	(7)	(35%)
Choreographers	19	22	3	12%
Media and communication workers, all other	18	37	19	100%
Audio and video equipment technicians	18	22	4	19%

South Central Region

Description	2002 Jobs	2007 Jobs	Change	% Change
Writers and authors	39	48	9	22%
Musicians and singers	21	23	2	11%
Music directors and composers	18	22	4	25%
Producers and directors	14	11	(3)	(19%)
Art directors	11	13	2	22%
Multi-media artists and animators	11	13	2	22%
Artists and related workers, all other	11	13	2	24%
Camera operators, television, video, and motion picture	10	<10	--	--
Photographers	<10	13	--	--
Entertainers and performers, sports and related workers, all other	<10	10	--	--
Advertising sales agents	<10	<10	--	--
Broadcast technicians	<10	<10	--	--
Actors	<10	10	--	--
Film and video editors	<10	<10	--	--
Agents and business managers of artists, performers, and athletes	<10	<10	--	--
Editors	<10	<10	--	--
Makeup artists, theatrical and performance	<10	<10	--	--
Public relations specialists	<10	<10	--	--
Animal trainers	<10	<10	--	--
Media and communication workers, all other	<10	<10	--	--
Audio and video equipment technicians	<10	<10	--	--

Southeast Region

Description	2002 Jobs	2007 Jobs	Change	%
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				Change
Writers and authors	3,483	3,929	446	13%
Musicians and singers	1,728	1,913	185	11%
Music directors and composers	1,551	1,753	202	13%
Producers and directors	1,376	1,432	56	4%
Advertising sales agents	1,372	1,610	238	17%
Photographers	1,162	1,260	98	8%
Art directors	987	1,116	129	13%
Camera operators, television, video, and motion picture	960	785	(175)	(18%)
Multi-media artists and animators	948	1,071	123	13%
Artists and related workers, all other	942	1,073	131	14%
Broadcast technicians	934	848	(86)	(9%)
Film and video editors	820	656	(164)	(20%)
Actors	774	876	102	13%
Entertainers and performers, sports and related workers, all other	748	857	109	15%
Public relations specialists	705	818	113	16%
Audio and video equipment technicians	503	442	(61)	(12%)
Media and communication workers, all other	320	321	1	0%
Graphic designers	313	375	62	20%
Agents and business managers of artists, performers, and athletes	295	335	40	13%
Editors	291	319	28	10%
Sound engineering technicians	256	275	19	7%
Advertising and promotions managers	158	209	51	32%

Southwest Region				
Description	2002 Jobs	2007 Jobs	Change	% Change
Writers and authors	575	639	64	11%
Musicians and singers	270	314	44	16%
Music directors and composers	260	291	31	12%
Advertising sales agents	213	234	21	10%
Photographers	170	181	11	6%
Art directors	170	189	19	11%
Multi-media artists and animators	165	183	18	11%
Artists and related workers, all other	161	180	19	12%
Entertainers and performers, sports and related workers, all other	126	152	26	21%
Producers and directors	125	144	19	15%
Actors	113	130	17	15%
Broadcast technicians	89	85	(4)	(4%)
Camera operators, television, video, and motion picture	77	71	(6)	(7%)
Agents and business managers of artists, performers, and athletes	55	68	13	24%
Public relations specialists	47	57	10	21%
Editors	38	41	3	8%
Media and communication workers, all other	22	28	6	30%
Audio and video equipment technicians	22	23	1	5%
Graphic designers	21	24	3	15%
Animal trainers	20	23	3	11%
Dancers	18	24	6	28%
Film and video editors	16	16	0	(1%)
Choreographers	16	18	2	12%

Tampa Bay Region

Description	2002 Jobs	2007 Jobs	Change	% Change
Writers and authors	2,151	2,567	416	19%
Musicians and singers	1,048	1,281	233	22%
Music directors and composers	957	1,148	191	20%
Art directors	611	728	117	19%
Multi-media artists and animators	608	723	115	19%
Artists and related workers, all other	597	723	126	21%
Photographers	594	692	98	16%
Entertainers and performers, sports and related workers, all other	448	562	114	25%
Advertising sales agents	435	500	65	15%
Actors	415	506	91	22%
Producers and directors	414	476	62	15%
Public relations specialists	373	407	34	9%
Camera operators, television, video, and motion picture	307	209	(98)	(32%)
Broadcast technicians	298	248	(50)	(17%)
Film and video editors	200	130	(70)	(35%)
Agents and business managers of artists, performers, and athletes	178	246	68	39%
Sound engineering technicians	144	138	(6)	(4%)
Graphic designers	143	161	18	12%
Editors	136	159	23	16%
Audio and video equipment technicians	115	97	(18)	(16%)
Dancers	82	109	27	33%
Media and communication workers, all other	81	94	13	17%
Animal trainers	75	89	14	19%
Advertising and promotions managers	61	74	13	21%

Source: EMSI Complete Employment - Spring 2008 Release v. 2

Unions are very important in the Film and Entertainment Industry. Virtually all film production companies and television networks sign contracts with union locals that require the employment of workers according to union contracts, although non-union workers may be hired because of a special talent, to fill a specific need, or for a short period. Actors who appear in filmed entertainment—including television, commercials, and movies—belong to the Screen Actors Guild (SAG), while those in broadcast television generally belong to the American Federation of Television and Radio Artists (AFTRA). Performers can belong to both. Film and television directors are members of the Directors Guild of America (DGA). Art directors, cartoonists, editors, costumers, scenic artists, set designers, camera operators, sound technicians, projectionists, and shipping, booking, and other distribution employees belong to the International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts (I.A.T.S.E.), or the United Scenic Artists Association. The Teamsters Union represents animal trainers and wranglers, casting directors, drivers, dispatchers, location managers, mechanics and warehousemen.

Because of the prevalence of unions within the industry, wages for the differing occupations vary tremendously. Table 17 shows the median wage, average wage, and wages broken out by percentiles for occupations found in the Florida Film and Entertainment Industry.

Table 17 – Florida Film and Entertainment Industry Wages

Description	2007 Jobs	2007 Median	2007 Avg	2007 Pct 10	2007 Pct 25	2007 Pct 75	2007 Pct 90
		Hourly Earnings	Hourly Earnings	Hourly Earnings	Hourly Earnings	Hourly Earnings	Hourly Earnings
Art directors	5,958	\$12.78	\$15.68	\$8.50	\$9.39	\$19.39	\$29.90
Multi-media artists and animators	5,823	\$11.63	\$14.40	\$7.93	\$8.66	\$17.70	\$26.98
Artists and related workers, all other	5,451	\$10.44	\$13.18	\$7.05	\$7.65	\$17.03	\$25.79
Graphic designers	14,114	\$17.62	\$19.36	\$10.94	\$13.73	\$23.13	\$30.30
Set and exhibit designers	2,196	\$19.39	\$23.02	\$8.30	\$12.27	\$29.75	\$44.26
Actors	3,615	\$9.80	\$14.30	\$6.95	\$8.25	\$15.41	\$29.04
Producers and directors	5,793	\$20.75	\$25.47	\$10.30	\$14.00	\$32.43	\$45.85
Dancers	1,399	\$11.06	\$12.23	\$7.12	\$8.65	\$16.07	\$24.26
Choreographers	508	\$10.32	\$13.32	\$7.20	\$8.02	\$16.05	\$24.62
Music directors and composers	8,739	\$8.00	\$10.29	\$7.05	\$7.17	\$11.57	\$20.86
Musicians and singers	12,489	\$8.90	\$11.48	\$6.90	\$7.51	\$14.20	\$22.22
Public relations specialists	22,540	\$21.22	\$23.84	\$13.07	\$16.16	\$28.35	\$38.82
Editors	7,342	\$20.67	\$23.31	\$10.94	\$14.50	\$28.90	\$40.06
Writers and authors	19,639	\$11.03	\$13.90	\$7.22	\$7.93	\$17.20	\$26.23
Audio and video equipment technicians	2,370	\$16.97	\$18.47	\$10.15	\$13.10	\$22.24	\$30.56
Broadcast technicians	2,944	\$16.97	\$18.31	\$9.21	\$12.31	\$22.83	\$30.42
Sound engineering technicians	1,135	\$15.88	\$17.92	\$7.98	\$11.66	\$22.73	\$29.54
Photographers	39,692	\$14.95	\$19.35	\$7.46	\$9.41	\$24.22	\$37.25
Camera operators, television, video, and motion picture	1,773	\$17.75	\$19.41	\$9.21	\$12.35	\$24.55	\$33.23
Film and video editors	1,229	\$17.03	\$20.04	\$9.71	\$12.62	\$25.35	\$35.28
Advertising sales agents	13,160	\$21.59	\$27.15	\$11.00	\$15.03	\$33.58	\$51.74
	177,909	\$15.37	\$18.62	\$8.99	\$11.06	\$22.87	\$33.83

Source: EMSI Complete Employment - Spring 2008 Release v. 2
PCT = Percentile. The percentile is the value of the variable below which a certain percent of observations fall.
For example, for art directors, 10 percent have hourly earnings of up to \$8.50; 25 percent have hourly earnings of up to \$9.39, etc.

Studies have found that the wage differential for union versus non-union employment, while varying between industries and occupations, can be as high as 30 percent. As illustrated in Table 17, wages within Florida for Film and Entertainment Industry workers when broken out in percentiles also reflect a union versus non-union wage differential. While union workday information was not available from many of the unions, data from the SAG suggests that production activity has been declining in Florida since 2005. See Table 18.

Table 18 – Florida Union Workdays

Screen Actors Guild Workdays						
Year	2002	2003	2004	2005	2006	2007
Days	21,204	21,270	20,224	23,692	19,598	17,795

Source: South Region Director, Screen Actors Guild

Education

Development and maintenance of a skilled workforce is, as stated earlier, of vital importance to the health of the Florida Film and Entertainment Industry. Jobs in the Florida Film and Entertainment Industry require a variety of educational degrees, work experience, and on-the-job training. Table 19 shows the standard educational and training requirements for occupations within the Film and Entertainment Industry.

Table 19 – Average Levels of Education and Training by Occupation

SOC Code	Description	Education Level
27-3043	Writers and authors	Bachelor's degree
27-2042	Musicians and singers	Long-term on-the-job training
27-2041	Music directors and composers	Degree plus work experience
27-4021	Photographers	Long-term on-the-job training
41-3011	Advertising sales agents	Moderate-term on-the-job training
27-1011	Art directors	Degree plus work experience
27-1014	Multi-media artists and animators	Bachelor's degree
27-1019	Artists and related workers, all other	Long-term on-the-job training
27-2012	Producers and directors	Degree plus work experience
27-2099	Entertainers and performers, sports and related workers, all other	Long-term on-the-job training
27-2011	Actors	Long-term on-the-job training
27-3031	Public relations specialists	Bachelor's degree
27-4012	Broadcast technicians	Associate's degree
27-4031	Camera operators, television, video, and motion picture	Moderate-term on-the-job training
13-1011	Agents and business managers of artists, performers, and athletes	Degree plus work experience
27-4032	Film and video editors	Bachelor's degree
27-4011	Audio and video equipment technicians	Long-term on-the-job training
27-1024	Graphic designers	Bachelor's degree
27-3041	Editors	Bachelor's degree
27-4014	Sound engineering technicians	Postsecondary vocational award
11-2011	Advertising and promotions managers	Degree plus work experience
41-9012	Models	Moderate-term on-the-job training
27-2031	Dancers	Long-term on-the-job training

Source: EMSI Complete Employment - Spring 2008 Release v. 2

Various types of degree programs are offered at Florida postsecondary schools that are specifically relevant to creating and maintaining skilled workers within the Florida Film and Entertainment Industry. Programs are offered in cinematography, drama and dramatic arts, graphic design, creative writing, radio and television broadcasting, and animation, just to name a few. These programs range in complexity from those that can be completed in less than one academic year to doctoral degree programs. Table 20 reports the number of degree completions by program type, as reported by the National Center for Education Statistics, in 2006 for degrees needed to prepare to work in the Film and Entertainment Industry. A full listing of degrees awarded by institution is included in Appendix G.

Table 20 – 2006 Florida Completions by Program

Title	2006 Completions
Music, Other	1,480
Cinematography and Film/Video Production	1,353
Mass Communication/Media Studies	1,309
Commercial and Advertising Art	567
Drama and Dramatics/Theatre Arts, General	460
Communication Studies/Speech Communication and Rhetoric	371
Public Relations/Image Management	358
Radio and Television	298
Music, General	277

Graphic Design	268
Web Page, Digital/Multimedia and Information Resources Design	252
Music Performance, General	204
Intermedia/Multimedia	200
Creative Writing	161
Radio and Television Broadcasting Technology/Technician	106
Computer Graphics	93
Dance, General	87
Photographic and Film/Video Technology/Technician and Assistant	68
Recording Arts Technology/Technician	53
Animation, Interactive Tech, Video Graphics and Special Effects	48
Jazz/Jazz Studies	37
Music Theory and Composition	34
Film/Cinema Studies	33
Industrial Design	22
Design and Visual Communications, General	21
Dramatic/Theatre Arts and Stagecraft, Other	15
Music Management and Merchandising	15
Acting	13
Piano and Organ	12
Religious/Sacred Music	11
Voice and Opera	11
Painting	9
Conducting	5
Music Pedagogy	4
Violin, Viola, Guitar and Other Stringed Instruments	2
Communications Technology/Technician	0
Theatre/Theatre Arts Management	0

Comparison to Nation

Data from the 2002 Economic Census employer statistics were used to compare the Florida Film and Entertainment Industry to that of the nation as a whole in terms of revenues and payroll. In 2002, Florida firms in the industry generated over \$4.7 billion in revenue and paid over \$1.2 billion in wages. These figures represented 3 percent of total USD revenues earned in the industry and 3.2 percent of the payroll in the industry. Florida company revenues represented the largest percentages of total US industry revenues in Television Broadcasting and Other Sound Recording. See Table 21.

Table 21 - 2002 Economic Census Revenue and Payroll Data

2002 Economic Census		Florida	
NAICS	Employers	Revenue (\$000)	Payroll (\$000)
334612	Prerecorded CD (except software), tape, & record reproducing	75,604	26,196
51211	Motion picture & video production	736,010*	116,312
51212	Motion picture & video distribution	24,047*	4,148
512191	Teleproduction & other postproduction services	38,964	14,958
512199	Other motion picture & video industries	6,860	2,833
51221	Record production	8,310	2,226
51224	Sound recording studios	25,515	7,914
51229	Other sound recording industries	31,146	9,049
51512	Television broadcasting	2,134,392	477,962
5152	Cable & other subscription programming	449,302	84,929
54181	Advertising agencies	621,098	294,102
541922	Commercial photography	68,444	16,981
71113	Musical groups & artists	159,093	43,365
7114	Agents/managers for artists, athletes, & other public figures	102,503	19,504
7115	Independent artists, writers, & performers	263,306	85,095
	Total	4,744,594	1,205,574

		Florida Percent of US	
NAICS	Employers	Revenue	Payroll
334612	Prerecorded CD (except software), tape, & record reproducing	1.7%	2.7%
51211	Motion picture & video production	1.6%	1.6%
51212	Motion picture & video distribution	2.1%	2.1%
512191	Teleproduction & other postproduction services	1.2%	1.2%
512199	Other motion picture & video industries	0.7%	1.2%
51221	Record production	2.5%	3.2%
51224	Sound recording studios	3.8%	3.3%
51229	Other sound recording industries	6.7%	6.2%
51512	Television broadcasting	6.5%	7.0%
5152	Cable & other subscription programming	1.8%	3.0%
54181	Advertising agencies	2.9%	3.1%
541922	Commercial photography	3.8%	3.3%
71113	Musical groups & artists	3.9%	3.4%
7114	Agents/managers for artists, athletes, & other public figures	2.8%	1.6%
7115	Independent artists, writers, & performers	2.8%	2.0%
	Total	3.0%	3.2%

* Receipts not collected at this level of detail for multi-establishments by the Census Bureau; numbers are estimated based on payroll reported. Source: US Census Bureau, Economic Census 2002

By 2007, the Florida major component industries of motion pictures, television, commercials and music videos, and digital media (computer graphics services) saw revenues exceeding \$8.5 billion, or 5.2 percent of US revenues. See Table 22.

Table 22 - Film and Entertainment Industry Annual Market Volume for Florida and the US 2005-2007

Annual Revenues			
Florida	2005	2006	2007
Motion Picture Production	\$ 7,689,385,704	\$ 6,665,766,884	\$ 7,799,715,445
Television Film Production and Programs	\$ 240,030,012	\$ 219,568,312	\$ 223,499,464
Commercials and Music Videos	\$ 77,481,278	\$ 65,774,630	\$ 128,964,156
Computer Graphics Services	\$ 401,138,010	\$ 350,208,155	\$ 409,697,064
Total	\$ 8,408,035,004	\$ 7,301,317,981	\$ 8,561,876,129
United States	2005	2006	2007
Motion Picture Production	\$ 169,129,478,732	\$ 147,193,494,157	\$ 152,085,203,663
Television Film Production and Programs	\$ 4,781,596,482	\$ 4,863,259,131	\$ 5,016,768,794
Commercials and Music Videos	\$ 981,346,594	\$ 954,660,398	\$ 1,754,550,000
Computer Graphics Services	\$ 4,399,150,789	\$ 4,137,762,184	\$ 4,571,082,250
Total	\$ 179,291,572,597	\$ 157,149,175,870	\$ 163,427,604,707
Florida Percentage of US Revenues	2005	2006	2007
Motion Pictures	4.5%	4.5%	5.1%
Television Film Production and Programs	5.0%	4.5%	4.5%
Commercials and Music Videos	7.9%	6.9%	7.4%
Computer Graphics Services	9.1%	8.5%	9.0%
Total	4.7%	4.6%	5.2%

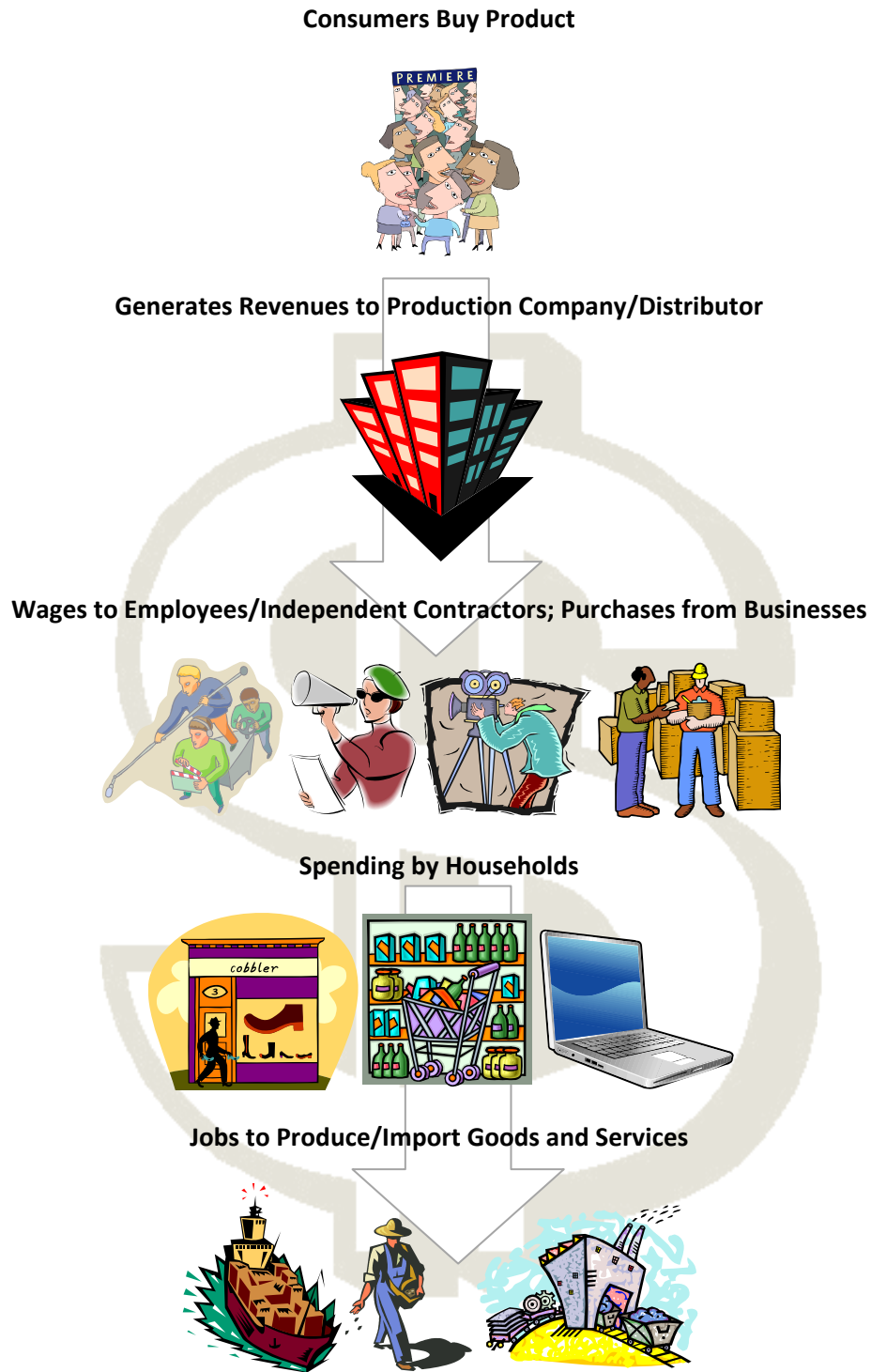
Economic and Fiscal Impacts

Economic impacts can be reported in different ways. Spending in the Film and Entertainment Industry creates jobs, directly in the industries as well as in related industries in the supply chain and in the broader economy where households spend their incomes. Thus, a job count is one appropriate way to measure impact; it is an intuitive concept and provides a broad measure of economic opportunities created for workers. It has the shortcoming that not all jobs are equal; differences in industry structure between regions and differences in pay for similar jobs due to other factors (e.g., quality of life) may mean that jobs in one region are different from jobs in another region.

Spending in an industry also creates sales, both final (to consumers) and intermediate (to businesses). Thus, the magnitude of total spending is often provided in economic impact calculations. However, calculation and reporting of the dollar value of all sales associated with Film and Entertainment Industry spending creates a risk of double counting, since the cost of inputs is included in the value of the final product. For example, the delivered price of a new car includes the cost of the tires, the battery, and other components purchased from suppliers, and even though the dollar value of all those transactions can be measured, they are implicitly included in the final sale price of the car. Or in the case of the Film

and Entertainment Industry, the final ticket price reflects all of the production costs, including props, set construction, equipment rentals, etc. that have gone into producing the product. See Figure 11.

Figure 11 - Effects of Spending in the Film and Entertainment Industry



This leads to investment in more productions, which leads back to consumer purchases.

As shown in Figure 11, spending in an industry also creates personal income, both to workers (wages, salaries, fringe benefits, and other compensation) and to business owners (proprietors' income). To the extent that these workers and owners spend their incomes in the local economy, there will be spin-off benefits and local economic impact associated with the flow. To the extent that the workers and owners are from other regions and spend their incomes elsewhere, personal income may not be an accurate indicator of local impact.

Another measure of economic impact is the increase in gross regional product (GRP) resulting from the presence of new spending flows. The increase in GRP is measured as the addition to the money value of all final goods and services produced within the region during a given time period. Because it measures final goods and services, it avoids the double counting inherent in the "total spending" measure. Because it incorporates leakages from regional income flows and from regional spending flows, it measures regional spending, as opposed to total spending (which would include national and international effects). This concept can be viewed as the value that is added within the region as part of the production process.

Table 23 summarizes the estimated economic impact of the Florida Film and Entertainment Industry for 2003 and 2007. The industry generated approximately 207,800 jobs in 2007, a 3.7 percent increase from 2003. Industries impacted the most by the flow of spending from the Florida Film and Entertainment Industry includes services, construction, retail trade, and information. The industry also generated approximately \$29.3 billion in output, up nearly 9 percent from 2003. In 2007, the industry was also responsible for nearly half a billion dollars in tax revenues. See Table 23.

Table 23 - Economic Impact of the Florida Film and Entertainment Industry in 2003 and 2007

Estimated Economic Impact of the Florida Film Industry in 2003 and 2007			
	2003	2007	% Change 03-07
Total employment	200,400	207,800	3.7%
Total GRP (Billions 2008\$)	15.83	17.88	13.0%
Personal Income (Billions \$)	6.72	8.5	26.5%
Output (Billions 2008\$)	26.89	29.29	8.9%
Value-Added (Billions 2008\$)	15.57	17.73	13.9%
Taxes	2003	2007	
Intergovernmental Revenue	\$ 49,612,000	\$ 43,380,000	-12.6%
General Sales Tax	\$ 262,800,000	\$ 258,300,000	-1.7%
Selective Sales Tax	\$ 85,203,000	\$ 90,750,000	6.5%
Corporate Income Tax	\$ 35,590,000	\$ 45,090,000	26.7%
Other Tax	\$ 39,070,000	\$ 60,020,000	53.6%
Total	\$ 472,275,000	\$ 497,540,000	5.3%

Source: REMI Policy Insight Versions 7.0 and 9.5

Table 23 Note: Numbers are estimates for the industry as broadly defined by the included NAICS codes and may not be comparable to other studies from other locations. See Appendix 2. Also the tax impacts are calculated based upon Florida state averages and do not reflect the industry specific Florida Sales and Use Tax exemption.

The dollar values in Table 23 are reflective of the magnitude of the Film and Entertainment Industry within Florida and quantify the spillover impacts it has in other markets not directly in the film and entertainment related supply chain. The 17.88 billion dollar impact on GRP represents 2.4 percent of the total 2007 GRP for the state. Table 24 shows the employment generated by the Florida Film and Entertainment Industry in other state industries as well as taxes generated by the industry as a whole.

Table 24 - Employment Generated by Industry

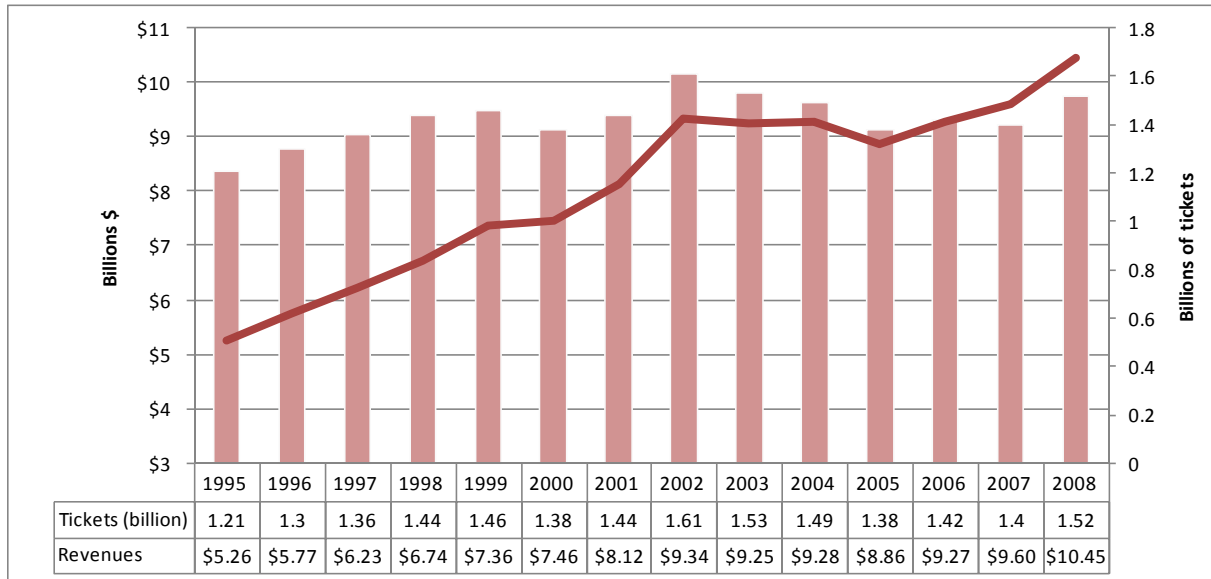
Breakdown of Employment Generated by Industry in other Industries		
	2003	2007
Forestry, Fishing, Other	576	304
Mining	46	23
Utilities	431	310
Construction	10,550	11,870
Manufacturing	6,011	3,060
Wholesale Trade	3,811	3,148
Retail Trade	13,560	10,810
Transportation, Warehousing	2,838	2,063
Information	28,950	26,520
Finance, Insurance	6,973	6,962
Real Estate, Rental, Leasing	3,800	5,577
Services	120,600	135,000
Professional, Tech Services	25,530	28,620
Management of Companies and Enterprises	1,195	1,056
Administrative, Waste Services	10,610	12,880
Educational Services	2,367	2,155
Health Care, Social Assistance	3,659	6,138
Arts, Entertainment and Recreation	58,730	68,200
Accommodation and Food Services	8,795	7,979
Other Services (excluding Government)	9,729	8,006
Public Administration	2,219	2,090
State Government	460	382
Local Government	1,759	1,708
Taxes	2003	2007
Intergovernmental Revenue	\$ 49,612,000	\$ 43,380,000
General Sales Tax	\$ 262,800,000	\$ 258,300,000
Selective Sales Tax	\$ 85,203,000	\$ 90,750,000
Corporate Income Tax	\$ 35,590,000	\$ 45,090,000
Other Tax	\$ 39,070,000	\$ 60,020,000
Total	\$ 472,275,000	\$ 497,540,000

Source: REMI Policy Insight Versions 7.0 and 9.5

Potential for Growth

According to MPAA, the domestic motion picture box office continued to grow in 2007, reaching \$9.63 billion after a 5.4 percent gain from 2006. The worldwide box office reached an all-time high in 2007 with \$26.7 billion in sales, a 4.9 percent increase from the previous year. See Figure 12.

Figure 12 - US Film Industry Box Office Revenues and Ticket Sales



Another sign of potential growth is the continued increase in media consumption. Overall media consumption by consumers of filmed entertainment saw a 6.3 percent increase between 2003 and 2007. See Table 25.

Table 25 - Media Consumption Hours per Person

Media Consumption Based on Hours per Person: Veronis Suhler Stevenson									
Filmed Entertainment	2003	2004	2005	2006	2007	2007 Weekly Average	% Change '06-'07	% Change '03-'07p	
Cable & Satellite TV	886	909	980	997	1,010	19.4	1.30%	14.00%	
Broadcast TV	729	711	679	676	676	13	0.00%	-7.30%	
Consumer Internet	153	164	169	177	181	3.5	2.30%	18.30%	
Home Video*	60	67	63	62	64	1.2	3.20%	6.70%	
Box Office	13	13	12	12	13	0.3	8.30%	0.00%	
In-flight Entertainment & Mobile Content	5	8	10	13	18	0.3	38.50%	260.00%	
Total	1,846	1,872	1,913	1,937	1,962	37.7	1.30%	6.30%	

*Includes playback of prerecorded VHS cassettes and DVDs only; p = preliminary

Source: MPAA Entertainment Industry Market Statistics 2007

Additionally, employment in the Florida Film and Entertainment Industry is projected to grow 20 percent between 2008 and 2018. See Table 26.

Table 26 - Selected Florida Employment Forecast

NAICS Code	Description	2008 Jobs	2018 Jobs	Change	% Change
512110	Motion picture and video production	5,663	6,839	1,176	21%
512120	Motion picture and video distribution	183	69	(114)	(62%)
512191	Teleproduction and postproduction services	453	524	71	16%
512199	Other motion picture and video industries	64	10	(54)	(84%)
512210	Record production	207	369	162	78%
512240	Sound recording studios	670	748	78	12%
512290	Other sound recording industries	278	218	(60)	(22%)
515120	Television broadcasting	9,792	11,062	1,270	13%
515210	Cable and other subscription programming	4,739	5,575	836	18%
541810	Advertising agencies	16,677	18,397	1,720	10%
541922	Commercial photography	1,213	967	(246)	(20%)
711130	Musical groups and artists	3,059	4,542	1,483	48%
711510	Independent artists, writers, and performers	58,264	72,277	14,013	24%
Total		101,263	121,598	20,335	20%

Source: EMSI Complete Employment - Spring 2008 Release v. 2

The Florida Film and Entertainment Industry is forecasted to grow faster than other targeted industry clusters within the state of Florida. With a projected employment growth rate of 20 percent, it is expected to grow faster than the Biomedical/Biotechnical cluster (19%) and the Defense and Security cluster (18%). See Table 27.

Table 27 - Florida Industry Cluster Growth Comparison 2008-2018

Florida Cluster Name	2008 Jobs	2018 Jobs	Growth	Growth %
Biomedical/Biotechnical (Life Sciences)	733,150	871,143	137,993	19%
Defense & Security	298,008	351,204	53,196	18%
Energy (Fossil & Renewable)	476,058	513,792	37,734	8%
Information Technology & Telecommunications	368,386	390,472	22,086	6%
Film and Entertainment	101,263	121,598	20,335	20%
Transportation Equipment Manufacturing	44,514	46,778	2,264	5%
Fabricated Metal Product Manufacturing	41,690	43,730	2,039	5%
Machinery Manufacturing	26,822	27,061	239	1%
Computer & Electronic Product Manufacturing	49,182	45,477	-3,706	-8%

Source: EMSI Complete Employment - Spring 2008 Release v. 2

Table 9 Note: Industry cluster definitions do not match those used by Enterprise Florida in defining targeted clusters; some industries may be included in more than one cluster.

Only four subsectors of the industry, Sound recording studios, Other motion picture and video industries, Motion picture and video distribution, and Commercial photography, are forecasted to lose employment, and these losses are due to slower than expected growth rates in these portions of the state's industry. See Table 28.

Table 28 - Florida Employment Shift Share Analysis 2008-2018

NAICS Code	Description	Job Change	Ind Mix Effect	Nat Growth Effect	Expected Change	Competitive Effect
711510	Independent artists, writers, and performers	14,013	3,524	7,831	11,355	2,658
541810	Advertising agencies	1,720	(860)	2,242	1,381	338
711130	Musical groups and artists	1,483	783	411	1,194	290
512191	Teleproduction and postproduction services	71	(33)	61	27	44
512210	Record production	162	110	28	138	24
512240	Sound recording studios	78	(11)	90	79	(1)
512199	Other motion picture and video industries	(54)	(25)	9	(17)	(36)
512290	Other sound recording industries	(60)	(44)	37	(7)	(53)
512110	Motion picture and video production	1,176	478	761	1,239	(62)
515120	Television broadcasting	1,270	21	1,316	1,337	(67)
512120	Motion picture and video distribution	(114)	(55)	25	(31)	(83)
541922	Commercial photography	(246)	(287)	163	(124)	(122)
515210	Cable and other subscription programming	836	401	637	1,038	(203)
Total		20,335	4,000	13,610	17,610	2,725

Source: EMSI Complete Employment - Spring 2008 Release v. 2

Industry Mix Effect = calculates the number of jobs created or not created in each industry due to the difference in that industry's local growth rate and the average national growth rate

National Growth Effect = the share of state job growth that can be attributed to growth of the national economy.

Expected Change = Job change expected due to the Industry Mix Effect and the National Growth Effect

Competitive Effect = the number of jobs created, or not created, as a result of the region's competitiveness. The assumption is that once national growth is accounted for along with the mix of industries (i.e., the Expected Change), any additional job growth must be due to the state's competitive advantage in that area.

An essential element for growing regional industries is a local supply chain. While it is not possible or cost-effective to produce all of the inputs (goods and services) that an industry needs locally, examining how much a selected industry or entire cluster purchases from various other industries (its "requirements"), along with how much of that amount is satisfied by industries inside the region and how much must be satisfied by industries outside the region, can reveal the industry's or cluster's major dependences on outside imports. For the Film and Entertainment Industry, these core industry suppliers include film labs, special effects and digital studios, location services, prop and wardrobe houses, research services and film stock houses, video duplicating services and stage rental facilities among others. Suppliers include not only specialized businesses that exclusively service the industry, such as wardrobe companies and camera supply houses, but also general suppliers serving a number of other industries, such as caterers, lumberyards, apparel retailers, and florists. Developing even just the specialized industries that supply the Film and Entertainment Industry in Florida adds to the overall growth of the industry as a whole. In Florida, a look at the Film and Entertainment Industry supply chain indicates areas for potential growth within the state. See Table 29.

Table 29 - 2007 Supply Requirements for the Florida Film and Entertainment Industry

2007 Requirements for: Film and Entertainment Industry				
NAICS Code	Description	Total Requirements (K)	% Satisfied in Region	% Satisfied out of Region
512110	Motion Picture and Video Production	\$59,461	41%	59%
512191	Teleproduction and Other Postproduction Services	\$20,147	32%	68%
711510	Independent Artists, Writers, and Performers	\$19,031	55%	45%
541810	Advertising Agencies	\$12,276	55%	45%
512120	Motion Picture and Video Distribution	\$11,858	49%	51%
541922	Commercial Photography	\$7,159	47%	53%
512199	Other Motion Picture and Video Industries	\$5,125	17%	83%
517510	Cable and Other Program Distribution	\$2,373	65%	35%
515120	Television Broadcasting	\$2,171	60%	40%
334612	Prerecorded Compact Disc (except Software), Tape, and Record Reproducing	\$1,888	52%	48%
512240	Sound Recording Studios	\$933	77%	23%
512210	Record Production	\$899	34%	66%
515210	Cable and Other Subscription Programming	\$872	51%	49%
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	\$821	46%	54%
711130	Musical Groups and Artists	\$22	48%	52%

Source: EMSI Complete Employment - Spring 2008 Release v. 2

Table 29 illustrates the percentage of industry requirements that are satisfied within Florida as compared to the percentage provided by suppliers outside of Florida. For example, only 41 percent of the supply chain requirements of the Motion Picture and Video Production Industries are satisfied within the state of Florida. Adding in-state suppliers to this industry will increase its impact on the state’s economy by eliminating leakages to other regions.

Industry Multiplier

A multiplier is a single number which summarizes the total economic benefits resulting from a change in the local economy. It summarizes the total impact that can be expected from change in a given economic activity. Multipliers reflect the underlying economic reality that increases in demand or spending cause “flow-on” or “ripple” effects. For example, a film shoot at a particular location will increase the incomes of accommodation providers, store owners, suppliers of raw materials for sets, and so on. This will in turn increase the demand or level of spending for their suppliers of goods and services. This flow-on can, in theory, continue indefinitely, but over time each ongoing “ripple” becomes increasingly smaller.

Multipliers are useful because they enable the estimation of the broad economic impact of a particular film policy or project, and therefore give policy makers a measure of its total economic benefit relative to cost.

Since multipliers are simple ratios of total to initial change, numerous economic multipliers are easy to calculate. Four multipliers are commonly used to assess impacts of an initial increase in production resulting from an increase in sales, usually called final demand in multiplier analysis. The four are: (1) Output, (2) Value-Added, (3) Income, and (4) Employment.

The Output multiplier estimates the total change in local sales, including the initial \$1 of sales outside the area, resulting from a \$1 increase in sales outside of the study area (final demand). Multiplying the increase in sales of the exporting industry by the Output multiplier provides an estimate of the total increase in sales for the study area, including the \$1 export sales. The Output multiplier is used to assess the interdependence of sectors in the local economy.

The Value-Added multiplier provides an estimate of the additional value added to the product as a result of this economic activity. It is not uncommon to find Value-Added multipliers of less than one at the state and regional level. This often confuses people as they think of a multiplier as increasing the estimated impact as it incorporates economy-wide or flow-through effects. However, the economic outcome represents the economy-wide increase in Value-Added (GDP or GRP) for a given change in final demand in the region, and some of the initial and flow-on effects can occur outside the region. Therefore the multiplier can be less than one at a state or regional level.

The Income multiplier measures only that proportion of Value-Added that accrues to individuals within the region as wages and salaries, and therefore is smaller than the Value-Added multiplier as it excludes gross operating surplus.

The Employment multiplier indicates the increase in employment that will be required to occur as a result of a given increase in demand. It should be noted that theoretically the number of jobs could stay the same, as businesses may respond to a change in demand in the short term by paying overtime rather than taking on new staff. Therefore, the increase in employment is often measured in Full Time Equivalents (FTEs) and the multiplier is usually expressed in terms of an increase of 'X' FTEs per million dollars of extra spending. The value of the Employment multiplier needs to be revised frequently because as wages rise a million dollars will fund fewer full-time jobs.

For the Florida Film and Entertainment Industry, a weighted average of multipliers for the various composite industries was used to calculate a multiplier that can be used to roughly approximate the economic impact of each dollar spent by a production in the state. Using industry multipliers from the IMPLAN modeling system, this overall industry multiplier is calculated to be 1.95. **Thus for every \$1 spent on a production within the State of Florida, the state sees an additional ninety-five cents in impact.**

The impact could be larger if more films and other types of productions were attracted to the state. In addition, the impact will grow if Florida continues to develop its Film and Entertainment cluster with larger pools of skilled labor, suppliers, and production capabilities. A film production and post-production cluster would likely attract more films and lead to a significant, lasting, long-term economic impact on the Florida economy.

Digital Media

Most motion pictures are still made on film. However, digital technology and computer-generated imaging are rapidly making inroads and are transforming the industry. Making changes to a picture is much easier using digital techniques, as backgrounds can be inserted after the actors perform on a

sound stage, or locations can be digitally modified to reflect the script. Even actors can be created digitally. Independent filmmakers will continue to benefit from this technology, as reduced costs improve their ability to compete with the major studios. Provision of these types of digital services within Florida is extremely important in maintaining a vital Film and Entertainment Industry.

Table 30 shows a count of firms providing these services listed in the Florida Film Production Guide in the state of Florida as of 2008

Table 30 – Post-Production Companies by Services

Services (Statewide)	2008 Firms
CD Duplication	60
DVD Duplication	50
Video Compression	56
Web Site Developers	87
Web Streaming	31
ADR	20
Animation/Computer Graphics	140
Animation/Motion Control	16
Animation/Optical-Visual Effects	40
Editing/Audio Post & Mixing	100
Editing/Film	24
Editing/HD	77
Editing/ Non-Linear	268
Editing/SD	194
Laboratories/Film	3
Production Audio	85

Source: Film Florida Production Guide 07-08

Workforce Survey

To gain further insight into the opinions of the Florida Film Industry workforce, we fielded a telephone-based survey from September 11, 2008 through September 17, 2008 yielding a total of 431 valid responses.¹ We obtained the potential respondent list from the Film Florida Production Guide comprised of individuals and businesses engaged in every aspect of Florida’s film economy. Our aim was three-fold. First, we attempted to assess the core demographics of those employed in the film and entertainment industry. Second, we wanted to assess their employment status and learn how much of their job-related activities keep them in the state of Florida. Finally, and perhaps most importantly, we wished to give these respondents the opportunity to provide their assessment of the Film and Entertainment Industry in the state. These data will allow us to examine the strengths and weaknesses of the industry from the perspective of those who earn their day-to-day living in film and entertainment in the state of Florida. These assessments, in turn, should be valuable to those engaged in promoting and regulating an industry that is a major player in Florida’s economy.

¹ We attempted to contact a total of 1976 individuals of whom 431 completed the final survey – a response rate of approximately 21%. However of the 1976 attempts we were able to make actual contact with only 637 individuals – yielding a healthy completion rate of about 68%. A facsimile of the survey instrument is presented in Appendix D.

Demographics

We begin our examination of the survey data with the demographic and educational characteristics of the film and entertainment industry workforce. As the data in Table 31 show, approximately 57 percent of the workforce possess a bachelors degree or higher. Indeed, fully 94 percent of the workforce has some educational training beyond high school. See Table 31.

Table 31 – Workforce Education²

	Percentage of Respondents
Some High School	0%
High School Diploma	6%
Some College	17%
Trade/Technical School	6%
Associate Degree	12%
Bachelor’s Degree	45%
Master’s Degree	10%
Doctorate/Professional Degree	2%

N=431

In addition to the overall workforce education, approximately 54 percent of the respondents indicated that they had industry-level certifications or a college-level degree that was directly relevant to their employment in the film and entertainment industry. As the data in Table 32 reflect, these degrees spanned the gamut of relevant occupations, from photography and directing to business and communications.

Table 32 – Film and Entertainment Industry Degrees Held by Respondents

	Percentage of Respondents
Communications – Broadcasting	22.1
Film	10.0
Industry Certifications (non-degree related)	9.1
Wardrobe – Makeup	9.1
Production	6.5
Business	3.5
Photography	3.0
Radio and TV	2.2
Theater	2.2
Directing	1.3

N=431

² Percentages throughout may not sum to 100 due to rounding. Additionally, those responding “don’t know” may be omitted for presentation purposes.

Additionally, we queried respondents on other relevant demographic characteristics such as age, race and gender. With respect to age, the pattern largely mirrors Florida as a whole. As Table 33 shows, fewer than 15 percent of those working in the film and entertainment industry are younger than 35. Fully 63 percent are between the ages of 35 and 54, and nearly one-quarter are over the age of 54. This is consistent with a state population that is, on average, older than that of many other states. Thus we can say that the film and entertainment industry is not attracting a disproportionate share of the younger population in the state.

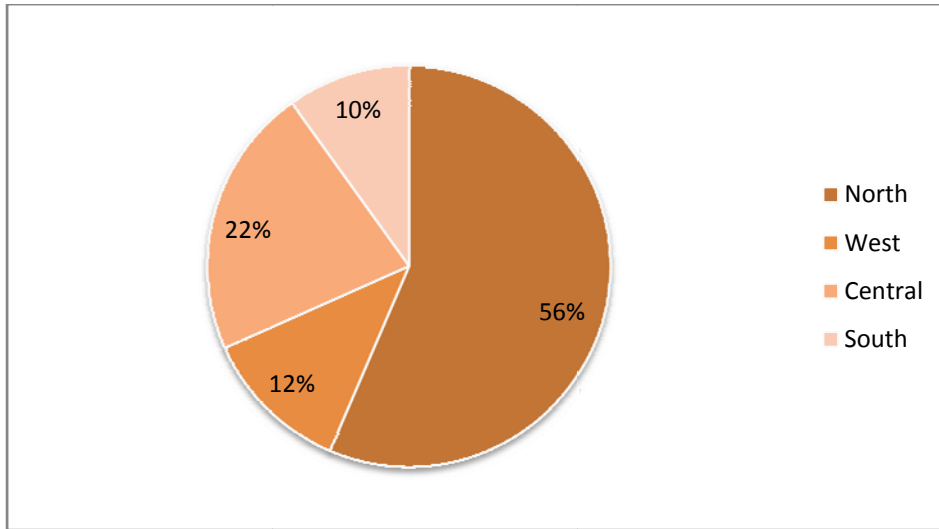
Table 33 – Age Distribution of Respondents

	Percentage of Respondents
Under 18	0
18-24	1
25-34	11
35-44	28
45-54	35
55-64	19
65-74	5
Over 75	1

N=431

Additionally, we note that approximately 77 percent of the respondents identified themselves as Caucasian, 3 percent self-identified as black, and 11 percent as Hispanic. Almost two-thirds of the respondents were male (65%). Naturally, the majority of the respondents were from the southern part of the state. The Film Florida Production Guide divides the state into four regions – North, West, Central, and South. As the graph below reflects, fully 56 percent of the respondents came from the southern region and 22 percent came from the central region (the Orlando area). The western and northern regions are collectively home to roughly one-quarter of respondents. This distribution of respondents compares favorably to the overall distribution of the industry within the state. See Figure 13.

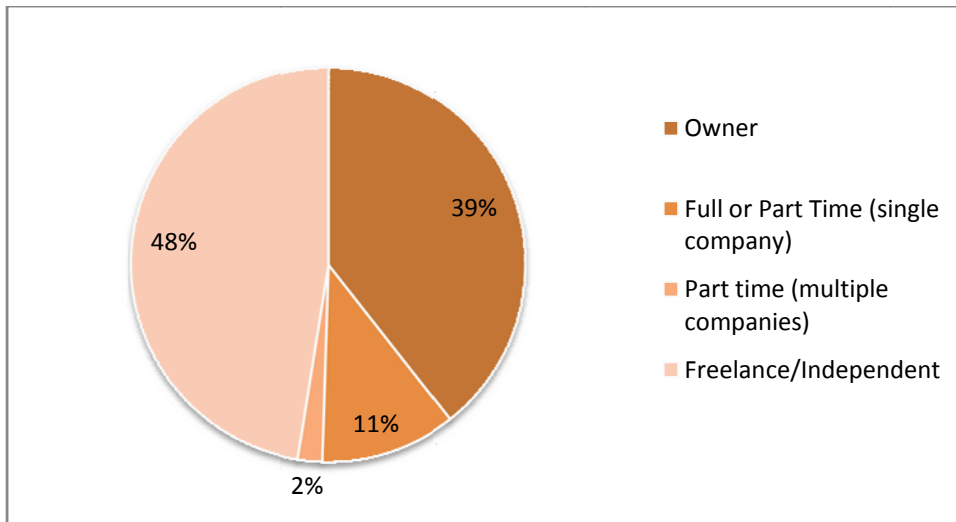
Figure 13 – Location of Respondents by Region



Employment and Operations

We asked respondents to classify themselves into one of the categories shown in Figure 14. As the figure shows, 39 percent of the respondents labeled themselves a business owner. Only 13 percent were employed by one or more companies either full-time or part-time. Freelancers and independents comprised the largest category – nearly half the total respondents.

Figure 14 – Employment Status of Film Industry Survey Respondents



Nearly 85 percent of the freelancers and independents stated that they operated out of the state of Florida – making Florida their home base. Of the owners and full-time and part-time employees, nearly all (93%) indicated that their company was headquartered in the state of Florida. For the handful who was not headquartered in Florida, most reported that their company was headquartered either in California or New York.

However, a Florida base or headquarters does not necessarily mean that these individuals did not travel out of state for work. Approximately half (51%) indicated that they had left the state for work in the past year. Those who identified as freelance/independents were much more likely to have traveled out of state (56%) than those who were owners/employees (47%) in the past year. We also asked respondents to tell us how much time they spent out of state in the past year. We report those figures in Table 34. As the data reflect, freelance/independents were not only more likely to go out of state, but also were more likely to spend more time out of state than their owner/employee counterparts.³

Table 34 – Time Worked Out of State in the Past Year

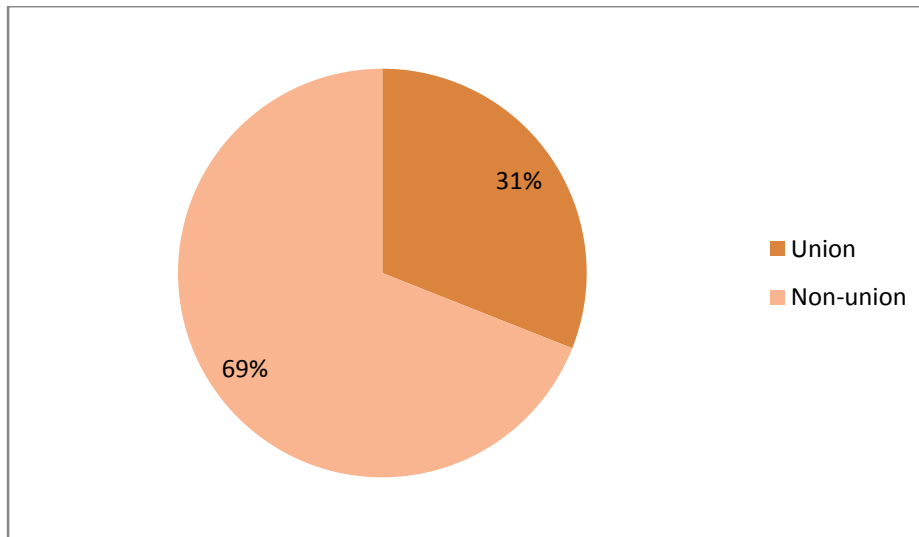
	Overall Respondent Percentage	Freelance/Independent Percentage	Owner/Employee Percentage
Less than one month	37	20	17
1 month	10	5	5
2 months	13	5	8
3 months	10	4	7
4-6 months	20	9	12
7-9 months	5	3	3
Over 9 months	4	1	3

N=431

Additionally, we asked respondents to report their union affiliation. As Figure 15 shows, approximately 31 percent of the respondents reported some affiliation with a union. However, this figure is driven primarily by the larger numbers of freelance/independents who reported that they were members of a union. Although only 17 percent of owners/employees reported an affiliation with a union, fully 46 percent of freelance and independents reported union membership. Further, we analyzed union membership by region (south vs. all other regions) and discovered that membership figures were precisely the same for each region. Although the southern part of the state is home to a significant portion of the entire Film and Entertainment Industry, union membership there is no stronger than it is in the other parts of the state. See Figure 15.

³ These figures highlight what we will develop as several potentially interesting dimensions for analysis – the regional dimension (south as compared to all other regions), the union dimension (union compared to non-union), and the employment status dimension (owner/employee as compared to freelance/independent dimension). When potentially enlightening data develop from these various comparisons, we will highlight them throughout this section of the report.

Figure 15 – Union Membership



Evaluating the Industry

The overwhelming majority of the respondents (64%) report that they began their career in the film and entertainment industry in the state of Florida. Of those who came to Florida from other states, approximately 30 percent came here from New York, 20 percent came from California, and 9 percent came from other countries. The remainder came from a smattering of other states around the US. These figures are not surprising given that California and New York have large film and entertainment bases – from Hollywood to Broadway these states are generally considered leaders in the industry.

To the extent that respondents did not start their career in Florida, 25 percent report that they were born in the place where they started their career and 37 percent report that they were still living where they started their career. Another 16 percent said that they were in college in the particular area where they started their career. Not a single respondent cited that Florida was a poor choice to begin a career in the industry as a reason for getting their start somewhere else.

From this point, our analysis will diverge onto two separate paths. In the initial portion of this section, we will address the desire of survey respondents to upgrade their industry skills. We will highlight the places they hope to seek their additional training as well as the types of training that they will be seeking. In the second section, we will discuss the opinions of the respondents with respect to the positive and negative aspects of the Film and Entertainment Industry in the state.

Fully 36 percent of respondents indicated that they were currently seeking to upgrade their film and entertainment industry credentials. An overwhelming majority of those individuals (79%) indicated that they would be seeking this training in the state of Florida. Of those 20 individuals who indicated that they would be leaving the state, 70 percent said that it was because the training that they sought was unavailable in the state.

Of the 157 individuals seeking additional training, 67 described specific programs in sufficient detail to allow us to categorize those responses. We list the top three responses in Table 35 below. As figures in

the table show, nearly 40 percent of these respondents indicated a desire for additional training in technology related fields. Fully 20 percent were interested in training in photography and 15 percent were interested in additional training in editing.

Table 35 – Types of Additional Training Sought

	Percentage of Respondents
Technology – Computers – Software	39
Photography	20
Editing	15

N=157

With respect to attitudes and opinions, we first asked respondents to compare Florida to other states in terms of their ability to find and maintain employment in the film and entertainment industry. We report the responses in Table 36 below. First, we note that there are a high percentage of respondents (57%) who report that finding work in Florida compared to other states is very difficult or somewhat difficult. Two sets of respondents appear to be driving these results. They are the freelance/independents and the union members. As the table shows, 69 percent of freelance/independents report that finding and maintaining work is very difficult or somewhat difficult. The figures creep even higher for those who report union membership. Fully 79 percent of respondents who are union members report that finding work is very difficult or somewhat difficult. Additionally, an overwhelming 72 percent of union respondents indicated agreement with the statement “other states have greater job availability in the industry.”

Table 36 – Difficulty of Obtaining Employment in Industry

	Overall Respondent Percentage	Freelance/Independent Percentage	Owner/Employee Percentage	Union Percentage	Non-Union Percentage
Very Difficult	28	39	22	45	23
Somewhat Difficult	29	32	31	34	31
Average	24	20	32	14	32
Easy	9	6	14	4	13
Extremely Easy	2	2	2	3	2

N=431

In free responses to inquires about their rating choices, respondents sometimes blamed the unions for the difficulty in finding employment. The economic downturn was also routinely cited as a culprit for their woes. However, overriding all else, respondents overwhelmingly blamed the difficulties on a poorly structured incentive structure. As one respondent noted “There are simply not enough film incentives, nor monetary incentives for production companies to qualify for when compared to other states.” This was echoed in response after response. Another respondent noted that “There are bordering states that offer way better tax incentives and have started building a filming crew base. It

comes down to how much money you can save especially when you can move just one state over.” Noted another: “The infrastructure is just not here and the atmosphere could be warmer and friendlier to the producers.” Finally, one respondent added “The Legislature and the Governor’s Office is [sic] not responsive or receptive to the film and entertainment industry. They need to provide more incentives for the companies coming into Florida and better advertising, such as promoting the Florida Film and Entertainment Industry.”

Table 37 – Suggestions for Improvement

	Percentage of Respondents
Provide additional tax/financial incentives	63
Increase the number of trade shows and networking opportunities	5
Increase support from the film commission	2
Mirror policies of other states (Louisiana, Georgia, California, etc.)	2
Increase the availability of training opportunities	2

N=431

We coded these free response items into several broad categories and present the results of our coding analysis in Table 37 above. We also note that up to this point in the survey, respondents had not been primed in any way. That is, neither trade shows, nor tax/financial incentives, nor even mirroring policies present in other states had been mentioned as potential improvements to the current system. Despite this, fully 63 percent of respondents mentioned additional tax and financial incentives as a needed addition to the current system. Their distant second suggestion involved increasing the number of trade shows and networking opportunities that are present statewide. At least some of the respondents felt that they would have better knowledge of available job opportunities if the state would promote networking through sponsored trade shows and industry-wide meetings.

Following the free-response suggestions of the respondents we asked them to rank order what we initially felt might be some of the more popular suggestions. As the table will show, our initial impression was correct. The respondents had already highlighted the most important issues prior to our asking them to gauge their importance. To provide additional evidence of their impressions with regards to tax-incentives, financial assistance, and other potential benefits to the industry, we provide their categorical responses below. At the top of the list, fully 79 percent of respondents felt that providing tax incentives for businesses willing to relocate to Florida was very important. A further 12 percent felt that it was somewhat important. Therefore, fully 91 percent of respondents felt that tax incentives were very important or somewhat important to the future of the Film and Entertainment Industry in Florida.

A further 87 percent felt that start-up assistance for new and emerging companies was very important or somewhat important, a considerable portion of the survey respondents. These tallies dropped somewhat for training assistance and university subsidies, but well over 50 percent of the total

respondents felt that both were very important or somewhat important for the Film and Entertainment Industry. See Table 38.

Table 38 – Importance Ranking of Selected Potential Industry Improvements

Statement	Very Important	Somewhat Important	Not Very Important	Not Important at All
Provide tax incentives for businesses willing to relocate to Florida.	79%	12%	4%	3%
Provide start-up assistance for new and emerging companies.	63%	24%	7%	4%
Provide financial assistance for those seeking training in the industry.	48%	34%	10%	6%
Provide subsidies for Florida colleges and universities to increase the number of training programs related to the film and entertainment industry.	47%	26%	13%	10%

N=431

Survey Summary

Our survey-based approach allowed us to analyze Florida’s film and entertainment economy from the perspective of those who work daily in the industry. With respect to education, we find that the overall level of education among film and entertainment industry employees is high. Further, approximately one-third of our respondents are seeking additional training in the industry and many hope to complete that additional training in the state of Florida. Despite their enthusiastic desire to advance themselves within the industry, there is an overall perception among respondents that Florida does a poor job – relative to other states – in maintaining and promoting a sustained and vibrant film economy. Respondents consistently highlighted the efforts of non-traditional film and entertainment states (such as Louisiana, Georgia, and New Mexico and more traditional film and entertainment states (such as New York and California) as far exceeding the efforts of Florida in regards to retention and promotion of film and entertainment companies.

An overwhelming number of respondents enthusiastically support tax breaks and other financial incentives for Florida-based companies and for companies that are willing to relocate to Florida. One respondent perhaps summed it up best when he said that the state “needs to get some incentives going to keep the production companies in the state....I would like for Florida to become Hollywood East.”

Digital and Interactive Media Breakdown Report

The Florida Digital Media Education Consortium defines digital media as “the creative convergence of digital arts, science, technology and business for human expression, communication, social interaction and education.” Digital media, as an industry, is enormously complex and varied, comprising a disparate

range of services and products across a broad range of applications, platforms, tools, and industry sectors; embracing education, information, entertainment, and consumer and business-oriented content. For purposes of this study, digital media includes the production of interactive entertainment, video games, simulation, digital animation, and digital productions intended for commercial or educational markets or Internet or wireless distribution.

A 2005 report from New Mexico identified the following characteristics for the industry:

“Digital media is an emerging industry with very strong prospects for growth. The details that lie beyond this are speculative, but insights can be gleaned from the experiences of other recently emergent industries such as semiconductors, software publication, internet-related businesses, as well as the film industry established nearly one hundred years ago. It is likely that growth will continue to be driven by technological advances; yet, with time, as technical benchmarks are established, segments of the industry also will likely migrate toward locations that offer lower costs Locations that establish an early beachhead will likely remain vital to the industry as sites of creativity and innovation, and somewhat less vulnerable to ongoing search for lower costs. These locations will feature institutions that provide research and highly specialized training, an advanced communication infrastructure and a creative and technically capable workforce. Finally, with the development of the industry, these locations will likely realize secondary benefits, as the digital media helps to foster conditions that enable related industries to take root.”

Advancements in digital media technology are opening up new distribution opportunities for the film industry. The PC as an entertainment hub is becoming a reality with increased processing power combined with a fast broadband connection, connectivity to a variety of displays, and increases in the compression/decompression of high-end audio and video.

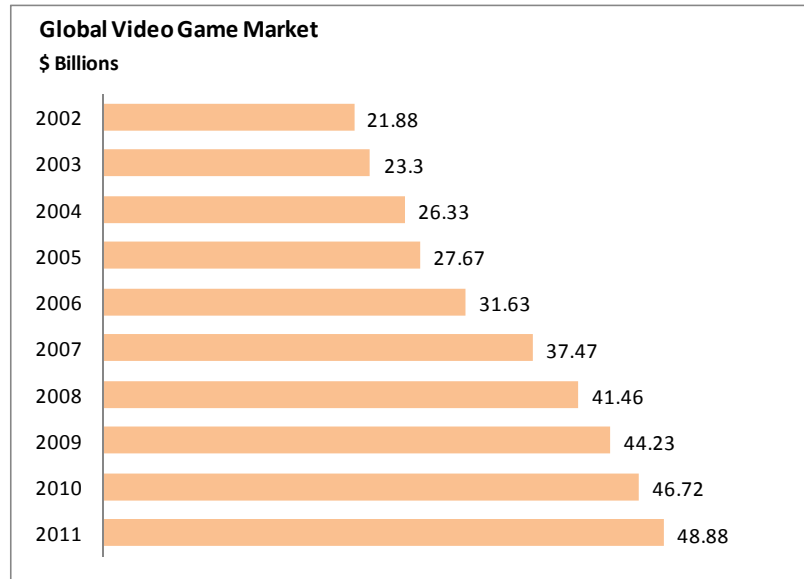
According to a 2006 study by the Entertainment Economy Institute, there is no single occupation that is representative of digital or multi-media. This is because digital media content generally requires a team of professionals to create it. Although one person could develop and implement a digital media project, most content is created through collaboration between several creative and technical professionals. A multi-media project team generally includes at least a project manager, an art director, a graphic designer, an animator, a sound engineer, a videographer, and a computer programmer. Various individuals on the team are responsible for creating different elements, e.g., animation, graphics, and sound. All the elements are then integrated to produce the final digital media content.

Digital media employees in the entertainment software industry may work in small game developer shops or in large game publishing companies with thousands of employees. They may be employed as programmers, arts and animation specialists, game designers, game production experts, quality assurance personnel, or audio specialists. Developers may specialize in games for specific types of platforms including game boxes, mobile, handheld and online.

There are several submarkets within the entertainment digital media market. One fast emerging market is the Entertainment Software or Games Industry. A 2007 study performed for the Entertainment Software Association found that the US entertainment software industry directly employs more than

24,000 people in 31 states, paid over \$2.6 billion in compensation to these employees, and had a value-added to the US Gross Domestic Product of \$3.8 billion. This market is expected to have more than doubled in size between 2002 and 2011. See Figure 16.

Figure 16 - Global Video Game Market Forecast



Source: PricewaterhouseCoopers

Another growing market for digital media employees is digital animation. Digital animation is essentially a computer-based successor to the art of stop motion animation of 3D models and frame-by-frame hand drawn animation of 2D. In 2008, eleven feature films were released using digital animation. See Table 39.

Table 39 - Market Share by Film Production Method 2008

Market Share for Each Production Method in 2008					
Rank	Production Method	Movies	2008 Gross	Tickets	Share
1	Live Action	513	\$6,563,032,564	953,929,140	87.46%
2	Digital Animation	11	\$692,645,000	100,675,147	9.23%
3	Animation/Live Action	4	\$234,876,522	34,139,029	3.13%
4	Hand Animation	2	\$12,733,612	1,850,815	0.17%
5	Multiple Production Methods	1	\$508,695	73,938	0.01%

Source: Nash Information Services

Digital Media Occupations

One representative digital media occupation in the Film and Entertainment Industry is multi-media artists and animators. This occupation is defined by the US Department of Labor as skilled professionals who “create special effects, animation, or other visual images using film, video, computers, or other

electronic tools and media for use in products or creations, such as computer games, movies, music videos, and commercials.” Table 40 shows the top 10 industries in the US that employ multi-media artists and animators.

Table 40 - Top 10 US Industries Employing Multi-Media Artists and Animators

Industry	% of Industry	US Annual Mean Wage
Motion picture, video, and sound recording industries	1.73	\$ 69,940
Specialized design services	1.05	\$ 80,520
Advertising and related services	0.92	\$ 56,750
Internet publishing and broadcasting	0.87	\$ 65,810
Software publishers	0.87	\$ 61,680
Self-employed workers	0.50	N/A
Photographic services	0.48	\$ 49,570
Radio and television broadcasting	0.42	\$ 47,870
Manufacturing and reproducing magnetic and optical media	0.38	\$ 44,610
Publishing industries (except Internet)	0.35	\$ 57,680

Source: US Department of Labor, Bureau of Labor Statistics, Occupational Employment Statistics, 2006.

Digital technologies are also used by film editors, sound engineers, and set designers. In Florida, a recent survey by Digital Media Alliance Florida identified about 25,000 companies in Florida’s digital media industry. Professionals in this sector include multi-media artists and animators, graphic designers, videogame and web developers, art directors, content authors, producers, audio engineers, motion graphics and video editors, photographers, and programmers. The survey also found that the digital media industry payroll statewide exceeds \$1 billion and that digital media professionals in Florida earn on average \$59,766 a year – compared to the \$38,498 statewide annual average salary for all industries. Table 41 shows employment in digital media occupations in Florida by region.

Table 41 - Selected Digital Media Occupations in the Film and Entertainment Industry in Florida

Statewide	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	6,338	\$26.49
	Art directors	6,490	\$13.38
	Multi-media artists and animators	6,089	\$11.69
	Graphic designers	15,273	\$18.45
	Sound engineering technicians	1,122	\$15.74
	Photographers	39,861	\$17.34
	Film and video editors	1,209	\$17.13
	Total	76,382	\$17.52
Northwest Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	854	\$31.48
	Art directors	461	\$12.11

Multi-media artists and animators	426	\$10.02
Graphic designers	899	\$16.84
Sound engineering technicians	60	\$14.36
Photographers	2,536	\$13.86
Film and video editors	49	\$16.19
Total	5,284	\$16.73

East Central Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	1,245	\$24.78
	Art directors	1,148	\$14.01
	Multi-media artists and animators	1,256	\$13.10
	Graphic designers	3,149	\$18.13
	Sound engineering technicians	149	\$16.11
	Photographers	6,084	\$19.04
	Film and video editors	181	\$14.52
	Total	13,212	\$18.29

North Central Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	155	\$22.67
	Art directors	215	\$10.68
	Multi-media artists and animators	191	\$7.86
	Graphic designers	400	\$16.06
	Sound engineering technicians	22	\$12.99
	Photographers	1,379	\$12.12
	Film and video editors	15	\$11.96
	Total	2,376	\$13.01

Northeast Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	778	\$30.62
	Art directors	489	\$10.79
	Multi-media artists and animators	429	\$8.94
	Graphic designers	1,024	\$17.66
	Sound engineering technicians	161	\$13.17
	Photographers	2,867	\$14.23
	Film and video editors	71	\$16.12
	Total	5,818	\$16.35

South Central Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	34	\$28.51
	Art directors	31	\$8.20
	Multi-media artists and animators	30	\$8.03
	Graphic designers	15	\$13.99
	Sound engineering technicians	<10	--
	Photographers	217	\$13.01
	Film and video editors	<10	--
	Total	333	\$13.71

Southeast Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	1,666	\$24.93
	Art directors	2,296	\$14.48
	Multi-media artists and animators	2,001	\$11.88
	Graphic designers	5,503	\$19.56
	Sound engineering technicians	482	\$16.87
	Photographers	16,285	\$18.62
	Film and video editors	660	\$18.05
	Total	28,892	\$18.34

Southwest Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	163	\$20.88
	Art directors	352	\$11.53
	Multi-media artists and animators	333	\$10.30
	Graphic designers	585	\$18.01
	Sound engineering technicians	36	\$17.23
	Photographers	2,347	\$15.32
	Film and video editors	39	\$18.36
	Total	3,855	\$15.25

Tampa Bay Region	Description	2008 Jobs	2007 Avg. Hourly Earnings
	Computer specialists, all other	1,444	\$25.60
	Art directors	1,499	\$13.38
	Multi-media artists and animators	1,422	\$12.45
	Graphic designers	3,699	\$18.01
	Sound engineering technicians	209	\$15.24
	Photographers	8,147	\$17.37
	Film and video editors	191	\$17.30
	Total	16,612	\$17.44

Source: EMSI Complete Employment - Fall 2008

Economic Impact of the Digital Media Industry

Using Florida occupation by industry information, the number of jobs in identifiable digital media occupations was entered into an input-output model in order to estimate the economic impact of the digital media industry within the Florida Film and Entertainment Industry. Data were used to calculate the number of jobs within Film and Industry NAICS codes that fit under the digital media umbrella, and only digital media jobs in industries in the broader Florida Film and Entertainment Industry were used in the calculations. Using IMPLAN modeling software, it's estimated that the digital media presence within the broader Florida Film and Entertainment Industry represents over \$3.6 billion in output and over \$1.5 billion in value-added and generates over 15,314 direct jobs and 28,750 total jobs throughout the entire Florida economy.

Digital media occupations are expected to grow overall by 11 percent in the next ten years, with multi-media artists and animators growing at the fastest rate. See Table 42.

Table 42 - Employment Forecast for Selected Digital Media Occupations in Florida

Description	2008 Jobs	2018 Jobs	Florida Change	Florida % Change	National % Change
Computer specialists, all other	6,338	7,281	943	15%	16%
Art directors	6,490	7,964	1,474	23%	19%
Multi-media artists and animators	6,089	7,765	1,676	28%	25%
Graphic designers	15,273	17,597	2,324	15%	14%
Sound engineering technicians	1,122	1,277	155	14%	12%
Photographers	39,861	41,756	1,895	5%	3%
Film and video editors	1,209	1,413	204	17%	18%
Totals	76,382	85,053	8,671	11%	11%

Source: EMSI Complete Employment - Fall 2008

There are broader implications for maintaining and growing the digital media industry in Florida. As the authors concluded in a 2006 study on the economic impact of the gaming industry in Austin, Texas, “The lines of demarcation between much of the creative economy are blurring, as music, film, and games are increasingly ‘mashed-up’ under the broad digital entertainment umbrella. To the extent that each has a strong local presence, the opportunity for synergy and overall growth is enhanced. This in turn enhances the ongoing appeal for the proverbial creative class, including both existing and potential residents.”

Hispanic and Minority Production and Services

Americans of Hispanic origin form the single largest ancestral minority grouping in the United States. In 2006 Hispanics composed 14.8 percent of the US population and 20.2 percent of the state of Florida’s population. By 2050 the US Census Bureau expects that Hispanics will compose up to one-quarter of the United States’ population. According to recent MPAA studies, Latinos see an average of 8.1 films per year whereas white Americans see an average of 7.1 films per year. According to the LA Times, Latinos in the United States spend “billions of dollars annually on entertainment and represent the fastest-growing segment of the movie-going audience.” But, in the US, Latino economic clout and growing market size has not yet translated into more opportunities on both the acting and production sides of the industry.

Table 43 shows the number of Hispanic or Spanish-language film productions and television shows (including number of series) shot in Florida from 2003 through 2007. Information was drawn from the Internet Movie Database (IMDB).

Table 43 - Number of Florida Hispanic Film and Television Productions

Year	Film	TV
2003	12	8
2004	17	16
2005	21	17
2006	12	6
2007	7	10

In order to better understand the challenges and opportunities unique to Hispanic and minority production and service companies located in Florida, we conducted a series of in-depth interviews with 16 companies self-identifying as Hispanic or minority owned around the state.⁴ Five of these companies identified themselves as producers of commercials or music videos; four self-identified as post-production companies, and three self-identified as independent film companies. The companies employed 7 people permanently (on average), and the range was from 2 to 16. However, a sizable number of these companies indicated that they hired temporary employees on an as-needed basis. Therefore, these estimates can be taken as the baseline number of permanent employees.

Approximately 82 percent of these firms reported a slow and steady growth in employment since 2002. None of the firms indicated a fast pace of growth in the past 6 years. However, many noted that they had taken major hits in the past fiscal year as the economy took a downward turn. For example, one firm noted that they were “growing up to last year,” but “since January, we have not replaced three employees who have left” the company. Their outlook for the future is tempered by their perceptions of the economy. Approximately 63 percent expect slow growth over the coming years. Only one company was expecting rapid growth, and 23 percent of those surveyed expected to remain the same size or downsize somewhat in the coming years.

To gain a better understanding of the respondent’s perception of the government’s ability to give Hispanic and minority production companies a boost in Florida, we asked them to identify those things that the state could do to encourage growth in their particular sector of the market. Respondents could choose more than one potential incentive. We reproduce the top four potential government incentives in the table below.

⁴ We make no claim that the sample of participating companies constitutes a representative sample even though the companies surveyed were randomly drawn from a list of all companies contained in the Film Florida Production Guide. In-depth interviews were conducted by Haas Center research staff.

Table 44 - Incentivizing Growth in Florida for Hispanic and Minority Production Companies

	Percentage of Respondents
Provide tax incentives for businesses willing to relocate to Florida.	86%
Provide start-up assistance for new and emerging companies.	71%
Provide subsidies for Florida colleges and universities to increase the number of training programs.	71%
Provide financial assistance for those seeking training in the industry.	64%

As the table shows, 86 percent of the respondents thought tax incentives would boost the industry in Florida. Approximately 71 percent of the respondents thought start-up assistance would provide a boost and 71 percent supported a program to provide subsidies for Florida colleges and universities to increase the number of training programs. A majority of respondents (64 percent) also supported financial assistance for those seeking training in the industry. One company noted that “customers are hesitant and they feel they have to leave Florida for major productions...permit issues and bureaucratic issues are huge – lots of red tape with permitting....” Another said to “tell Crist to work on incentives, especially to compete with North and South Carolina and Louisiana...sell Florida!”

These Hispanic and minority owned companies produced an average of 110 productions⁵ in Fiscal Year 07-08. This represented a “substantial increase” in production over 2002 for 14 percent of the firms surveyed and a “moderate increase” in the number of productions over 2002 for 50 percent of the firms surveyed. However, 34 percent of the companies reported that the number of productions had remained constant or “decreased substantially” in the last six years. One Florida company reported that they produced an average of 5 or 6 productions per month last year; however, that number has now declined to 3 or 4 productions per month. Another company noted that “the economy is causing problems, statewide. We are not getting the big pictures we were expecting – lots of business in Florida is going to the Carolinas, Louisiana and California...there is not much happening in Florida.” Some of the funding for these productions comes with partnerships with other businesses and some from the major networks and includes production of commercials, shows, internet videos, and music videos. At least one company had strong partnerships with the military and received the majority of its funding there.

The workforce serving Hispanic and minority owned production companies appears well educated. Most (over 50 percent) of the permanent workforce among those surveyed hold a bachelor’s degree, and nearly everyone has at least a high school diploma. A smaller number have a master’s degree with a fair number holding industry-level certifications in various relevant areas as well. Approximately 93 percent of the companies surveyed felt that their workforce was either more educated than, or equally as educated as, the workforce in the rest of the industry.

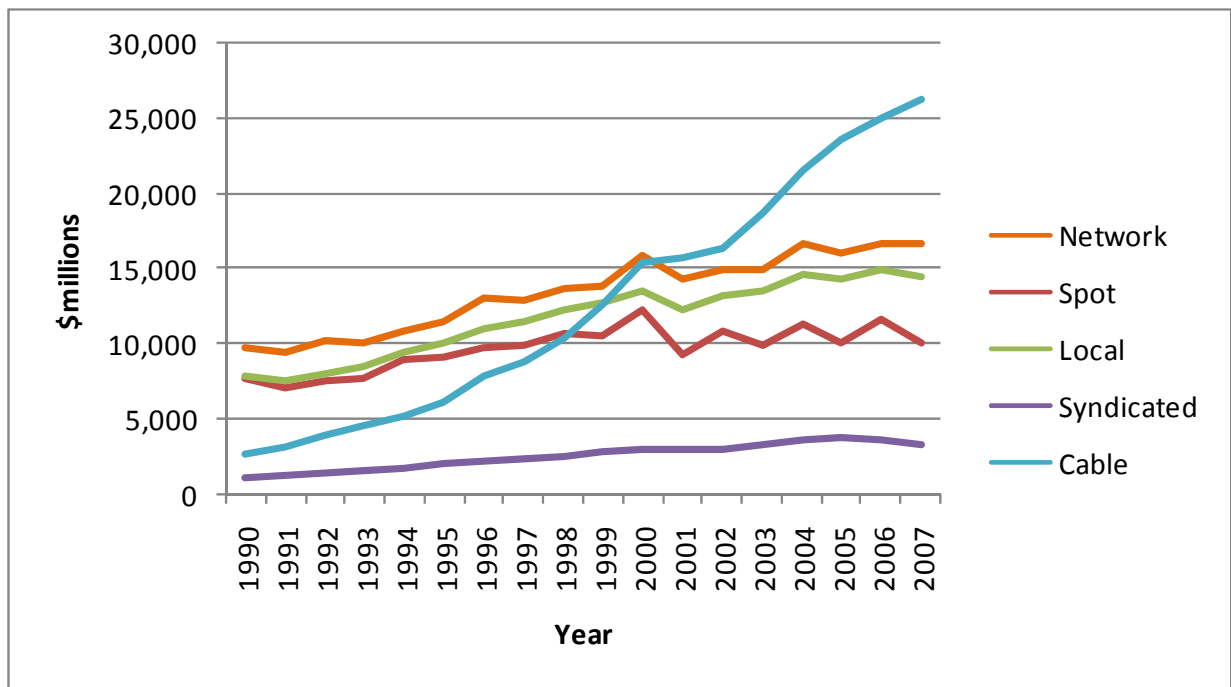
⁵ These included all types of productions – not just film.

Commercials and Music Videos

Because a single television advertisement can be broadcast repeatedly over the course of weeks, months, and even years, production studios often spend large sums of money in the production of one single 30-second television spot. This has resulted in a number of high-quality advertisements utilizing the latest in special effects technology, the most popular personalities, and the best music. A number of television advertisements are so elaborately produced that they can be considered miniature 30-second movies.

The demand for television commercial production is derivative and based solely on the decisions of advertisers as to where to spend their advertising dollar. Figure 17 shows the annual spending on advertising in the US by television vehicle. As seen, by 2000 advertising spending on cable television surpassed that of network television and has continued to increase. Table 45 shows the spending changes by media category between 2006 and 2007. The Internet saw the largest growth in advertising spending, while newspapers saw the largest decline. Cable television and Spanish-language television also saw increases in spending, while network and local television markets saw declines.

Figure 17 - National Television Advertising Spending



Source: Universal McCann.

Table 45 - Change in US Advertising Spending by Media Category

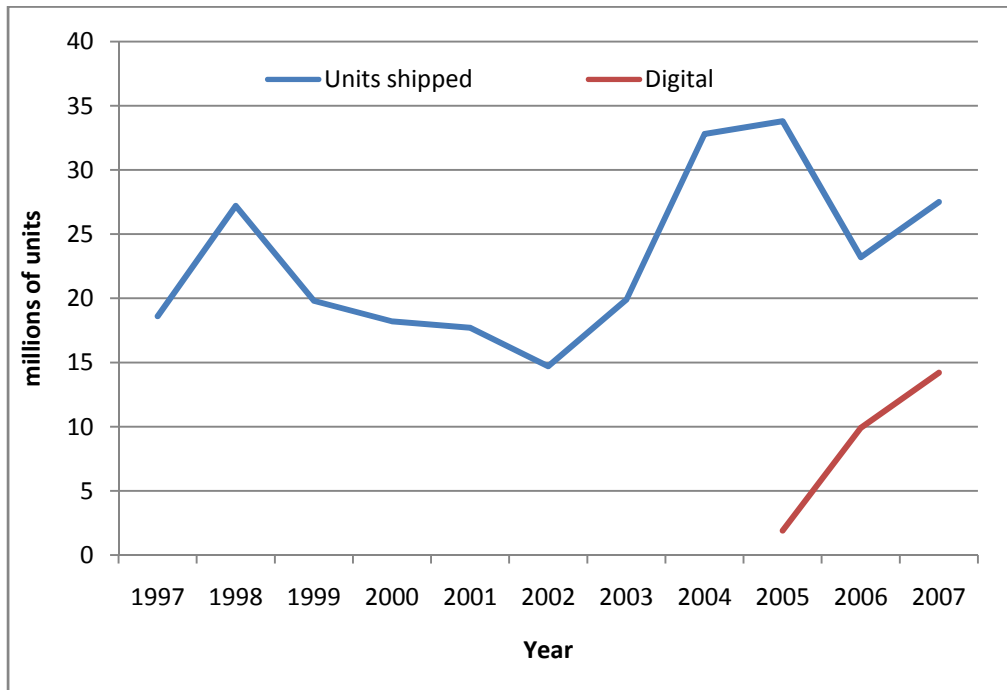
Media Category	2006 vs. 2007 % Change
Internet	18.9%
National Magazines	7.6%
Outdoor	7.2%
Nat'l Sunday Supplements	4.9%
National Cable TV	2.2%
Spanish-Language TV	1.5%
Network TV	-1.5%
Local Magazines	-1.7%
Spot Radio	-2.0%
Spot TV Markets 101-210	-2.6%
Network Radio	-3.9%
B-to-B Magazines	-4.0%
Local Sunday Supplements	-4.9%
Spot TV Markets 1-100	-5.1%
Local Newspaper	-7.5%
Nat'l Newspaper	-7.7%
Total Advertising Spending	0.6 %
Source: Nielsen Monitor-Plus -Syndicated TV and FSI Coupons were excluded due to methodology changes -Newspaper reflects display ads only	

Since music videos are essentially promotional and commercial material for the music industry, demand for music video production is derivative of the demand for musical recordings and performances. Music videos are crafted to promote the performer and a current song and to provide entertainment. Under most artist agreements, record producers advance the costs of music videos produced under contracts. Production costs range from \$25,000 to over \$1 million, although most videos are shot for under \$100,000.

According to the Recording Industry Association of America (RIAA) 2007 Year End Shipment Statistics, sales of recorded music have been falling steadily since 2002, while the number of music downloads has been growing sharply since 2004. In 2005, industry revenues were split 91 percent physical and 9 percent digital. In just two years, those numbers switched to 77 percent physical and 23 percent digital.

Conversely, the number of physically shipped music videos has been increasing, although recent figures suggest that there, too, there is switching occurring to digital downloading. See Figure 18. This suggests that the market for music videos remains strong, although the delivery method is changing.

Figure 18 - Music Video Shipments 1997-2007



Source: RIAA 2007 Year End Shipment Statistics

The RIAA cites Florida as a home state for the music industry, with 10,258 people employed in the core music industry and 47,911 people employed in jobs directly and indirectly related to the industry. Also, South Florida is considered a gateway to Latin American music. Four major music labels have offices in Florida, with all of them basing Latin branches on South Beach in Miami Beach.

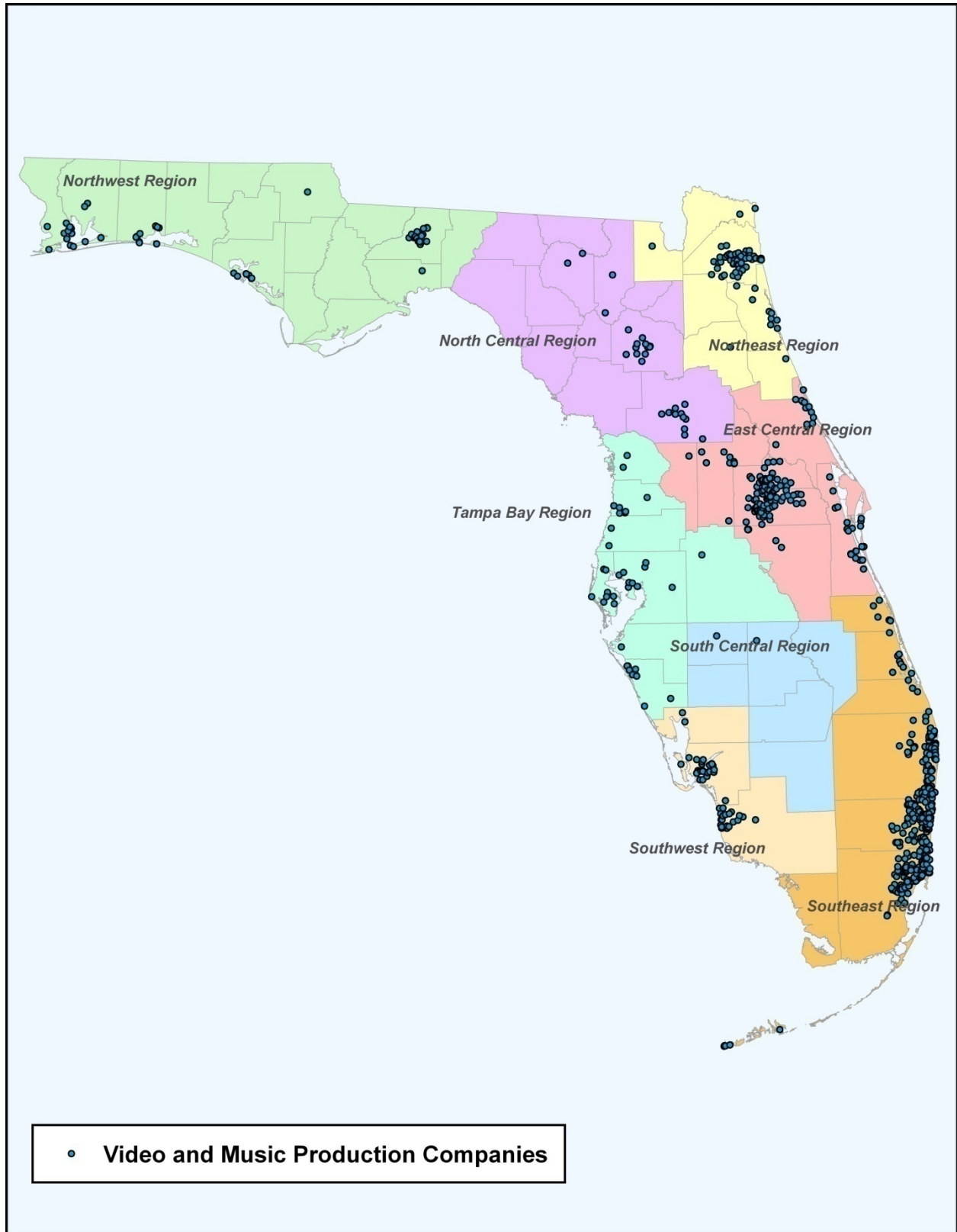
Table 46 shows the annual sales volumes from commercial and video production companies located in Florida.

Table 46 - Annual Sales Volume for Commercial and Video Production Companies in Florida

Year/Industry	Establishments	Sales Volume/ Revenues
2003		
Commercial Production	24	\$ 26,062,000
Video Production	888	\$ 915,576,000
2004		
Commercial Production	21	\$ 23,236,000
Video Production	871	\$ 945,720,000
2005		
Commercial Production	23	\$ 51,810,000
Video Production	889	\$ 906,784,000
2006		
Commercial Production	18	\$ 48,356,000
Video Production	742	\$ 746,692,000
2007		
Commercial Production	18	\$ 49,298,000
Video Production	730	\$ 822,052,000
Source: InfoUSA		

According to the Florida Film Production Guide 2007-08, an extensive but not exhaustive listing of Film and Entertainment Industry companies in Florida, there are currently 385 companies within Florida that produce commercials and 178 companies in Florida that produce music videos, with some overlapping between companies. Figure 19 shows the location of the 741 music and commercial production companies identified by InfoUSA by region. The greater numbers of companies are located in the Miami and Orlando areas.

Figure 19 - Florida Music and Commercial Production Companies



Source: InfoUSA

To further our understanding of the companies that produce commercial and music videos in Florida, we conducted 10 in-depth interviews with companies around the state of Florida who self-identified as producers of commercials and music videos. In Fiscal Year 07-08 these 10 companies produced an average of 15 commercials/music videos in the state. Fully 60 percent of these companies indicated that this figure has decreased moderately or substantially since Fiscal Year 02-03. The remainder indicated that the figure had either remained unchanged or risen moderately. No company indicated a substantial rise in production since 2002-2004. These companies spent an average of \$650,000 in the state over the previous year. Included in this figure were salaries, benefits, production costs, and travel expenses. The 10 companies employed an average of 24 employees. Not surprisingly, 50 percent reported that this number had decreased moderately or substantially since FY 02-03. The remaining 50 percent indicated that the employment figure remained unchanged since FY 02-03. No one indicated an uptick in employment over the past 6 years.

Naturally, interview participants were somewhat vague in reporting their funding sources. On the whole, the bulk of their funding appeared to come from individual businesses, bands, advertising agencies, and large corporations. Some of the production work occurred in south and central Florida including Orlando and Miami. However, the largest company interviewed indicated that roughly half of their production work occurred out of Florida in New York. Others companies reported that a sizable amount of production work took place in Georgia.

With respect to the Florida portion of these companies' business, only 1 company reported a moderate increase in business that was Florida related over the past 6 years. Fully half of the companies reported a moderate or substantial decrease in business and the remaining 40 percent indicated no change in Florida business since FY 02-03. An overwhelming 90 percent of these companies forecast a moderate or drastic decrease in production in the future for commercials and music videos with budgets greater than \$100,000. The remaining company felt that the future for productions in this budget range was likely to remain stable. One respondent summed it up by saying that "business is suffering and I do not anticipate any sort of positive growth in the near future."

When we asked these individuals to give us their impression of the future of these productions statewide, everyone was similarly pessimistic. Fully 80 percent forecast a moderate or drastic decrease in productions statewide for the future. The remainder felt that things were likely to remain stable at the current level. Again, no one anticipated any statewide growth in the near term.

Overall, companies doing commercials and music videos in the state of Florida appear to have had a rough few years. More tellingly, they are very pessimistic about the future. Much like the industry as a whole, commercial and music video companies blame their trouble on the lack of state incentives within Florida stiffening the competition with other states.

Assessment of Films by Independent Florida Filmmakers

Today, due to the large volume of inexpensive, high-end digital film equipment available at the consumer level, independent filmmakers are no longer dependent on major studios to provide them with the tools they need to produce a film.

Independent filmmakers have been traditionally defined as those that work outside of the established Hollywood studio system. Independent filmmakers represent a vast, diverse market. Ranging from feature films, documentaries, and short films, independent film has made it to the forefront of the entertainment industry. While higher budget independent films like *Juno* and *Little Miss Sunshine* have brought independent filmmaking to mainstream America, the rapid diffusion of affordable technology has made lower budget independent films (\leq \$1 million) extremely salient and has led to an exponential increase in the number of aspiring filmmakers. Even though most of the independent films never make it to theatrical release, their production and distribution represent a large opportunity for revenues.

Table 5 shows the number of movies, television movies, videos, and short subjects shot on location in Florida with known budgets of \$1 million or less from 2002 to 2007.

We conducted 8 in-depth interviews of independent producers in the state of Florida.⁶ They reported that they had, on average, completed 340 productions since 2002. The average production involved approximately 11 employees and the range was 4 to 25 employees per production. Their clients ranged from corporations to government agencies desiring short films and small productions. Included also were TV shows with various entertainment companies. We attempted to have these independent producers elaborate on two key items relevant to this study. The first was identifying the main problems faced by independent filmmakers in the state, and the second was analyzing potential solutions to the problem.

Table 47 - Assessment of Problems Faced by Independent Filmmakers in Florida

	Percentage of Respondents Indicating Agreement
There isn't enough funding, or funding is difficult to obtain for productions.	75%
There isn't enough public knowledge of independent films.	75%
There aren't enough tax incentives for independent filmmakers.	50%
It is hard to get productions distributed once they are complete.	50%
There isn't a large enough well-trained workforce.	0%

As the data displayed in Table 47 reflect, the two key concerns center on the lack of funding for, and lack of public knowledge of, independent films. Respondents also indicated that a lack of tax incentives and problems with distribution were also key issues faced by independents. However, none agreed with the statement that there isn't a large enough well-trained workforce.

⁶ These were independent producers, not restricted to independent film producers.

Table 48 - Things State Can Do to Alleviate Problems Faced by Independent Filmmakers

	Percentage of Respondents Indicating Agreement
Invest more in independent films, or make it easier and more enticing for private investors to invest in Florida.	75%
Provide better tax incentives for independent filmmakers.	75%
Provide better incentives for distribution companies so that they are more willing and able to distribute independent films.	25%
Make training and additional coursework more available for potential crew.	0%

With respect to potential solutions to these issues, the respondents identified investments and incentives as key. Also consistent with all other segments of the Florida Film and Entertainment Industry, these companies feel that either the state must invest more directly in the industry, or the state must make it easier for private investors to invest in independent productions in the state and see better tax incentives as key to these issues.

Assessment of International Non-Hispanic Production

Since 2001, Florida has offered a sales and use tax exemption to any qualified production company engaged in Florida in the production of motion pictures, made for television motion pictures, television series, commercial advertising, music videos, or sound recordings on the purchase or lease of certain items used exclusively as an integral part of the production activities in Florida. Data from applicants for this exemption shows that since 2005 there have been 739 productions shot in Florida by either out of state or international companies that applied for the sales tax exemption. See Table 49.

Table 49 - Out of State and International Company Productions

	2005	2006	2007	Total	% change 05-07
Motion Picture	15	11	15	41	0%
Made-for-TV Motion Picture	3	1	1	5	-67%
Television Series	19	25	46	90	142%
Music Video	20	17	13	50	-35%
Commercial Advertising	114	160	162	436	42%
Sound Recording	3	3	3	9	0%
Other	22	41	45	108	104%
Total	196	258	285	739	45%

Source: Florida Department of Revenue

The data were used to further identify the amount of international non-Hispanic production activity that has occurred in Florida since 2001. Table 50 shows the number of international, non-Hispanic applicants for Florida's sales tax exemption incentive program from 2001 through 2007.

Table 50 - International Non-Hispanic Entertainment Industry Productions in Florida

Country	2001	2002	2003	2004	2005	2006	2007	Total
Austria	0	1	5	0	0	0	0	6
Canada	4	5	0	11	12	12	12	56
Germany	0	1	1	1	1	0	1	5
Iran	0	0	0	1	0	0	0	1
Ireland	0	0	0	0	1	0	0	1
Italy	0	0	0	0	2	0	0	2
Netherlands	0	0	0	0	0	0	1	1
Sweden	0	0	1	0	0	0	0	1
United Kingdom	3	2	2	4	2	0	5	18
Total	7	9	9	17	18	12	19	91

Source: Florida Department of Revenue

The data reflect that while there has been a significant increase in international productions since 2003, the number has remained fairly constant since then, with a slight decrease in 2006. The low number of productions suggests that this is not presently a large part of the industry as whole. One opportunity for Florida in this segment comes from the Indian Film Industry. India has the world's largest film industry, of which Mumbai-based Bollywood, which produces Hindi films, is the biggest part. India releases over 1,000 movies per year, or about twice Hollywood's production. One strategy for Florida to use in tapping into the Indian industry is to attract location shooting. For example, the recent Indian production of *Dostana*, which centers around three young Indian professionals living in Miami, brought a local production budget of about \$2 million – equivalent to an independent film or a major commercial - to the Miami area. The biggest impact, however, for Florida in attracting location shooting from India may be on tourism. Known as the "Bollywood effect," Indian movies set on location have been credited with spikes in vacationers from India, one of the world's fastest-growing economies. Switzerland established itself as Indian vacationers' No. 1 European destination after Bollywood directors used its Alps as a substitute for scenes set in the dangerous Kashmir region and Indian tourism to New Zealand surged 800 percent in the four years after the Bollywood hit *Say You Love Me* was filmed in Queenstown, according to a report by the British film agency.

Assessment of Faith-Based Production Facilities and Companies

Three years after Mel Gibson's *The Passion of the Christ* became a surprise international blockbuster, purveyors of faith-based entertainment think there is a growing demand for their product. The number of DVDs targeting the Christian market is growing. According to Grace Hill Media, the producers of *Thou Shalt Laugh* and the leading marketing firm for religious consumers, "the Christian entertainment

industry has boomed into a more than a \$3 billion a year industry." Christian-themed radio and books each reportedly generate more than \$1 billion annually.

In recent years, seven major studios have opened divisions that target faith-based audiences. Through its FoxFaith subsidiary, Twentieth Century Fox is expected to release 12 faith-based films annually. Last fall, the Walt Disney Company announced plans to refocus on family-oriented content.

Movies with redemptive themes have consistently earned more revenue than any other type of film, averaging \$39 million in 2006, up from \$5 million in 1993, according to Movieguide's recent annual report to the entertainment industry. The report found nearly 50 films were released in 2006 with positive Judeo-Christian content. That's up from only one movie in 1985 when Movieguide first began reviewing films.

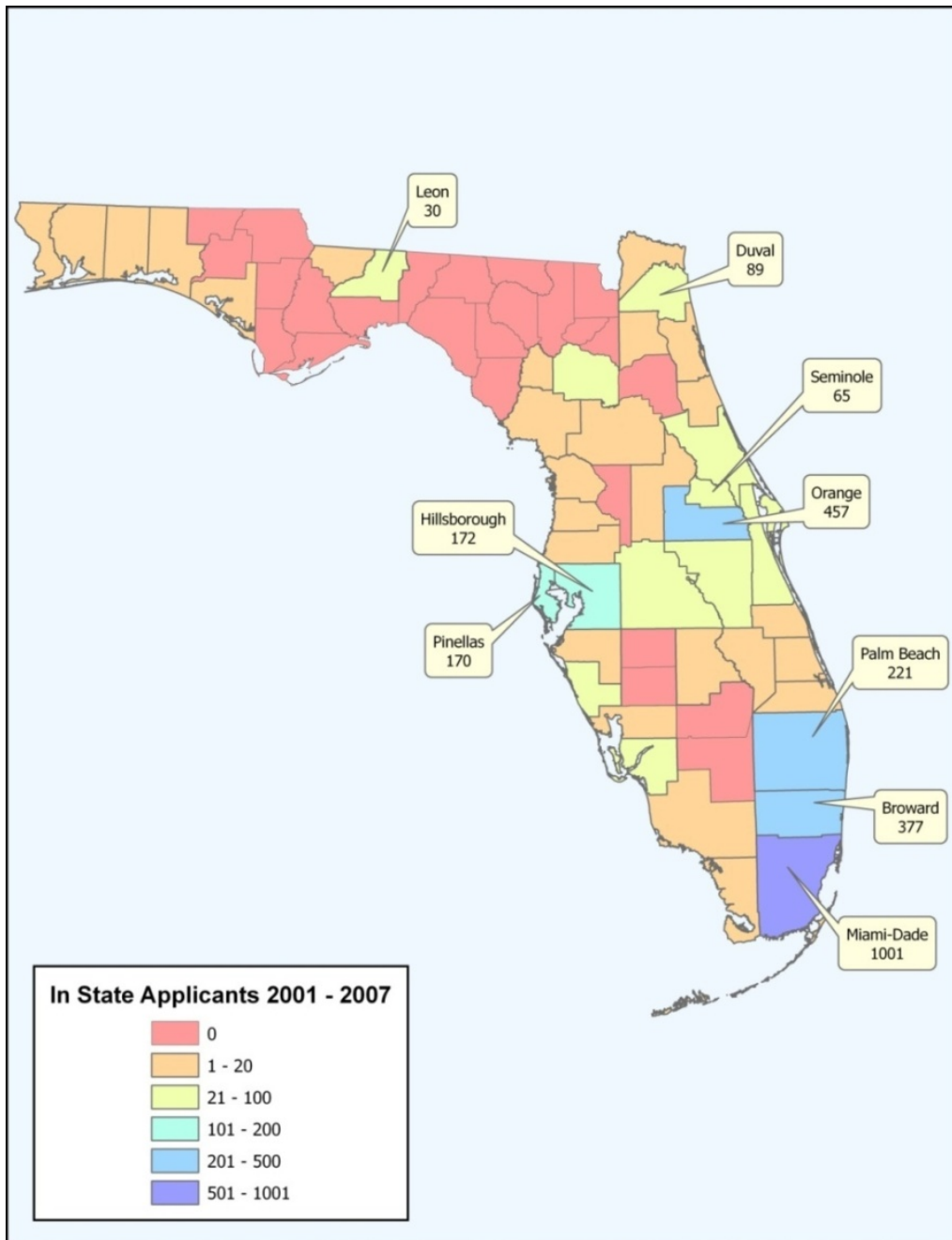
Currently, there is one film production company located within Florida that identifies itself as specifically a faith-based organization. However, faith-based productions are becoming a considerable force in the entertainment industry. The growth of such production companies represents a potential opportunity for the state.

Location Filming Assessment

In years past, filming was done either in studios or on location. Studios shot movies to make use of their studio and backlot spaces and went on location when "authenticity" demanded it. Today, the studio is just another location and locations themselves have become a totality of place – not just the scenery to be filmed, but an agglomeration of what is available to the filmmaker in terms of shooting environment and availability of production and post-production services. Table 10 shows the number of film productions shot on location in Florida, according to the Internet Movie Database (IMDB), from 2002 to 2007.

Using Florida sales and use tax exemption incentive data, production activity occurring in Florida since 2001 was mapped at the county level. It should be noted that these data do not include production activity from out of state, and that one application can represent multiple productions as well as multiple applications representing one lengthy production. See Figure 20.

Figure 20 - Florida Tax Exemption Applicants by County



Source: Florida Department of Revenue

Naturally, there were a number of film productions and other types of business that looked at shooting in Florida that ultimately were done elsewhere or not at all. We obtained data on 317 projects that were lost from Florida over the past three years (2006-2008) in order to determine the main reasons why work that might have been shot in Florida ultimately did not come to the state. The major types of projects are listed in Table 51 below.

Table 51 - Types of Projects Lost from Florida (2006-2008)

Type of Project	Number of Projects Lost	Percentage of Total
Feature Films	124	39%
Commercials	89	28%
Still Photos	25	8%
TV Series	21	7%
TV Pilots	14	4%

As the table demonstrates, most of the losses occurred in the feature film category (39 percent of the total). Approximately 28 percent of the losses were commercials, 8 percent were still photos, and 11 percent were either TV series or pilots. The remainder of the losses occurred across a variety of categories including infomercials, TV reality programs, TV specials, and music videos.

Moreover, our data include the reasons that these projects were lost from the state. The primary reasons included a lost bid, cancellation of the pending production and loss to competitors. As the data in Table 52 show, a majority of projects were lost due to cancellation or a competitor.

Table 52 - Top Reasons for Lost Projects

Reason for Loss	Number Attributed to Type of Loss	Percentage Attributed to Type of Loss
Lost Due to Cancellation	116	36%
Lost to Competition	193	64%

Note: "Lost Due to Cancellation" means the entire production was cancelled; "Lost to Competition" means the production went to another state or country to film.

We selected the top three types of projects lost from Florida (feature films, still photos, and commercials) and analyzed the types of losses that occurred within each category. As the data in Table 53 show, of the 193 total projects lost due to competition, 63 of those were feature films. This comprised 52 percent of the total losses in the feature film category. More of the feature film losses occurred as a result of cancellation than did commercials and still photos.

Table 53 - Reasons for Lost Project by Product Type

	Reason for Loss	Number Attributed to Type of Loss	Percentage Attributed to Type of Loss
Feature Films	Lost Due to Cancellation	58	48%
	Lost to Competition	63	52%
Commercials	Lost Due to Cancellation	9	15%
	Lost to Competition	76	85%
Still Photos	Lost Due to Cancellation	5	24%
	Lost to Competition	19	76%

Local Film Liaisons

There are 54 local film liaisons within the state of Florida that provide production assistance to the Film and Entertainment Industry. These liaisons are independent of the state office and are typically housed in economic or tourist development organizations. Many are one person shops. As part of the location filming assessment, these offices were contacted and asked for data regarding productions, production leads, scouting trips, permits, production days, persons hired, and hotel/motel rooms booked. Data was received from ten of the offices and included that of areas that are home to the bulk of film production activity within Florida, although the time periods for reporting of the data were inconsistent. Thus, Miami-Dade County was selected as a proxy for film and video production activity throughout the state. Data include numbers for the City of Miami and the City of Miami Beach from FY02-03 to FY07-08. See Figures 21 and 22. A complete report of the data collected from the film offices is included in Appendix I of this report.

Figure 21 - Film and Video Productions in Miami-Dade County FY02-07

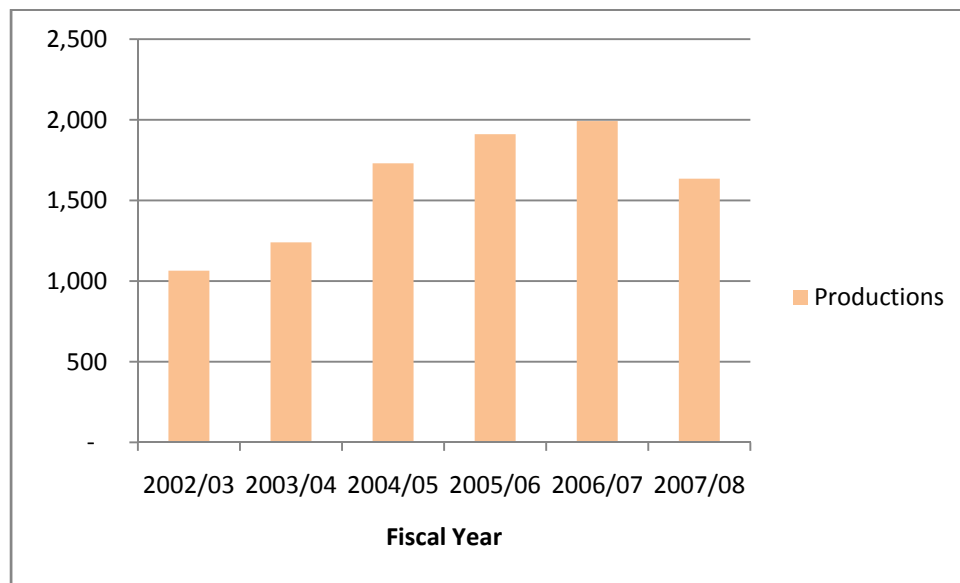
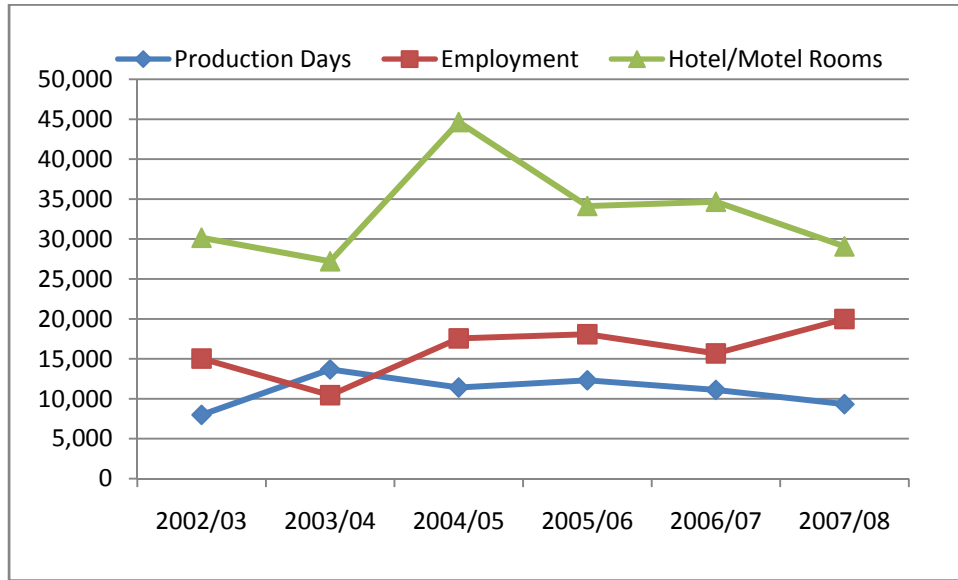


Figure 22 - Production Days, Employment, and Rooms Booked for Miami-Dade County



The data reflect a declining number of productions (from 1,992 in FY 06-07 to just 1,635 in FY 07-08) and production days (from a high of 13,681 in FY 03/04 to 9,328 in FY07-08), although employment on these productions has increased since 2002 (15,033 in FY 02/03 compared to 19,986 in FY 07-08).

Economic Impact

Employment and spending information for the Motion Picture and Video Production Industry (NAICS 512110) within Florida was entered into an input-output model in order to estimate the economic impact of the industry within the broader defined Florida Film and Entertainment Industry. Because the information from the local film offices was not suitable for this type of analysis, the data used consisted of direct employment and production spending estimates reported to the Florida Department of Revenue as part of the sales and use tax exemption applications completed by both in-state and out-of-state companies. Using IMPLAN modeling software, estimates of overall economic impact for these productions were calculated for calendar years 2002 through 2007. The results are included in Table 54 below.

Table 54 - Estimated Economic Impact of Movie and Video Production in Florida

Year	Employment	Output	Value Added
2002	64,546	\$ 8,119,965,471	\$ 2,993,988,085
2003	42,576	\$ 5,601,977,913	\$ 2,028,934,994
2004	35,688	\$ 4,768,067,327	\$ 1,717,226,181
2005	52,254	\$ 6,579,472,745	\$ 2,426,104,169
2006	50,340	\$ 6,315,477,221	\$ 2,332,247,475
2007	26,257	\$ 3,423,802,351	\$ 1,247,357,571

All Output and Value Added numbers are in 2008 dollars. Source: IMPLAN

The data indicate that the impact of motion picture and video production fell sharply between 2006 and 2007 along with a declining number of productions and reduced employment generation throughout the Florida economy.

Post-Production Activity Assessment

Most of the technological advances in the production process have revolved around the ability to “post” film entertainment content electronically. Post-production is a term of art that refers to important processes such as editing, color correction, sound engineering, and creation of computer-generated images (CGI) and combining (or “compositing”) CGI with live action visual images.

For contemporary filmmakers, films shot on 35mm negative film can be digitized to high resolution, edited, color corrected and then output back onto film. During editing, additional material and computer special effects can be added in to produce the final film – all within one post-production facility.

One of the results of these technological changes is that filmmakers now have a much larger pool of potential post-production service providers. They can continue to use the facilities that are geographically proximate to their production site or they can look for smaller facilities in new markets. Managers of new production facilities that have emerged around the world have been able to train operators on new equipment and enable them to market their services around the world as well as locally. This has allowed new production markets to build a technical infrastructure without relying solely on local production. Once a certain level of technical infrastructure is in place, these new markets can build sound stages and attract production that would require some local post-production services.

We contacted post-production companies in order to assess post-production activity within the State. In many instances, companies that were willing to speak to us often self-classified as something other than post-production. That is, many companies promote themselves as commercial and music video companies or independent production companies and also do post-production as well. However, we contacted 63 post-production companies who are currently doing the post-production work on 10 films currently in post-production in Florida. Of these, 2 were shot in Fiscal Year 04-05 and 4 were shot in Fiscal Year 06-07 in the state of Florida. Another 3 films were shot out of state in Fiscal Year 06-07 and 1 was shot out of state in Fiscal Year 05-06. One of the companies has plans to complete post-production work on an additional film that was shot in Fiscal Year 06-07. All of the non-Florida productions were shot in Louisiana and Georgia, with some work done in Canada; however, companies were very reluctant to give us additional information about these companies.

One of the companies was exceptionally pleased that the state gave tax breaks for purchasing the high definition and digital equipment that has become a necessity in the field. This company felt that it would be extremely beneficial for the state to offer post-production small business loans similar to the ones in place for new studios and some smaller companies. Another company representative noted that “Florida has good incentives for large companies, but the actual money that backs these incentives

is way below other states....It's not that our incentives are bad, it's just that other states have gotten better while Florida has remained static....”

Assessment of Classic Cell Animation Facilities in Florida

The rapid advancement of technology has made computer animation available to the masses, replacing in many instances classic cell, or individually hand drawn character animation techniques, and making the animation industry one of the fastest growing entertainment industries. Owing to the increase in computing power and the reduction in computing costs, more of the global computer animation production output is being tapped by film and television producers within the US.

Digital Vector reports that the major factor behind the shift of computer animation production to the Asia/Pacific region continues to be the availability of low cost, powerful computer animation platforms and much lower labor rates in the Asian and Pacific Rim countries compared to North America and Europe. The bulk of the outsourcing happens for 2D animation content with some amount of 3D content, with the costs of getting work done in countries such as Korea said to be roughly half that incurred in production houses in developed countries. In countries such as the Philippines and India, the costs are even lower (25-30 percent of the cost of production in developed countries). As a result, there is a considerable increase in the 2D and 3D animation outsourcing to India. India is also emerging as a post-production hub for animation.

Table 55 shows employment in animation film service companies (including those that provide digital services) in Florida from 2003 to 2007.

Table 55 - Florida Animation Film Services Companies

County	2003	2004	2005	2006	2007
Broward	6	9	3	6	22
Escambia	2	2	2	0	0
Hillsborough	0	5	11	11	11
Lake	0	1	1	1	1
Miami-Dade	9	10	12	12	25
Monroe	1	0	0	0	0
Orange	357	158	155	156	156
Osceola	0	0	0	0	10
Palm Beach	35	24	24	24	0
Pasco	2	2	2	2	2
Sarasota	0	0	3	3	3
Seminole	8	7	7	8	8
St. Lucie	1	1	1	3	3

Source: InfoUSA

In January of 2004, Disney shut down their Florida classic cell animation studio as part of their decision to move away from 2D, or cell-shaded, animation and limit production to CGI animation. Two years

later, as part of a new deal with Pixar, Disney decided to return to classic cell animation for some projects. Currently in production is their first project returning to hand drawn animation, *The Princess and the Frog*, a fairy tale set in 1920's Jazz-era Louisiana.

Currently in Florida, there are an estimated 39 companies that deal in 2D or classic cell animation. All are located in the Southeast, South Central, and Tampa Bay regions of the state. These remaining companies are small businesses that typically employ fewer than 10 employees. According to the 2008 wage survey from the Animation Guild, union wages for 2D animators range from \$1,490 to \$3,000 per 40-hour work week.

Industry Insights

Industry professionals in Film and Entertainment Industry companies not currently located within Florida were questioned in order to gain additional anecdotal insight into current perceptions and opinions of Florida as a place to do business. Companies questioned included international production companies, motion picture studios, finance companies, distribution companies (major and independent), Hispanic production companies, visual effects houses and game developers. Comments and responses varied very little between these different entities and are summarized below.

1. Would you ever consider relocating to Florida? Why or why not?

- Very few interviewees seemed interested in the idea at all, for either personal or business reasons
- Most respondents said there was not enough business in Florida to make it worthwhile or profitable
- Many said it was too far away from California or New York, the main industry hubs
- One post production company put it this way, "Obviously for us it's important to be located close to where things are being produced and filmed, because then we have easier and better connections for our business. Well, the Miami area has quite a bit going on . . . there simply isn't a large enough market right now. Florida would have to have a lot more entertainment business, in general, for us to want to be located there."

2. What is your image of Florida as it relates to your field of business?

- "Subprime."
- "Vacation entertainment."
- "Second-tier."
- "Has the potential, but the business isn't there."
- In most interviewee's opinions, the base, i.e. the network, workforce, infrastructure, etc, are not in Florida, making it difficult to do business successfully.

3. What can Florida do to improve your ability to do business in the state?

- Many respondents said to not just offer incentives, but offer better incentives, especially better than where business is big. Florida needs to go above and beyond what states like California and New York offer to get any business, to make it worthwhile
- Many respondents saw Florida as really inconsistent in regard to incentives, permits or regulations. They felt it was too uncertain to do long term business in the State.

- Florida needs to build up its infrastructure
- Tax and insurance are two of the biggest hurdles, and Florida needs to make it easier to either get around these issues, or to improve on them
- One person mentioned the unions in Florida being difficult to work with, and that they would rather work in North Carolina or another union-free state than deal with it
- Florida needs to market itself more. One man in Arizona said he had no idea what Florida had to offer, because they never market themselves, but he was very aware of what other states, mainly New Mexico and Louisiana, in addition to California and New York had to offer. In his opinion, that is how they got the work and were able to continue building their infrastructure, leading to more and more work in the state.

4. Are you aware of the financial incentives?

- Nearly all were unaware that Florida offered any incentive package at all

5. Have you ever filmed in Florida? Why or why not?

- Only one respondent had ever filmed in Florida, and said that it was a long time ago.
- Respondents thought the state was pretty, but that there really is not enough of a draw to keep coming back in terms of variety and business reasons.
- Others performed most of their work locally.
- An international respondent from Norway stated that Florida is not of any particular consequence in regards to the film industry as a whole.

A July 2005 study done on behalf of the Colorado Film Commission identified the following benchmark criteria for regions interested in participating in the film industry:

- Availability of capital (including incentives)
- High caliber skilled professionals
- Filming facilities
- Filming locations
- Good communications and transport infrastructure
- Well-developed leisure industry close to the filming site
- Hospitable political and social environment

It is clear from earlier analysis that Florida already meets these criteria to one extent or another within the state, but it is equally clear from the interviews with professionals outside of Florida that they are unaware of this fact. Regionally, some areas within Florida are stronger than others in meeting these factors, particularly South and Central Florida, and to a lesser extent Northeast Florida.

Statewide SWOT Analysis

SWOT analysis is a tool for auditing an organization or industry and its environment. It is the first stage of planning and helps stakeholders to focus on key issues. SWOT stands for strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are internal factors. Opportunities and threats are external factors.

What follows is a SWOT analysis for Florida both as a filming location and a business location for the Film and Entertainment Industry.

Strengths

Uniqueness of place – Florida offers a wide variety of filming locations that are difficult to duplicate in the United States and several, such as Miami, that are internationally recognizable. As Matt Nix, Executive Producer, Writer, and Creator of the USA Network original series *Burn Notice* put it in a July 31, 2008 interview “. . . we do have a lot of opportunity to explore because we are outside so much on location, it’s very easy to say that Los Angeles can double or Vancouver can double for anyplace, and it’s true that anyplace can have the inside of a police station because you can build it or you can find a few palm trees in any location or bring them, but one of the nice things about working in Miami is that it’s a big city, it’s a distinctive city, and they’re really are a lot of distinctive things about it, and if you’re not here you can’t get all the fun deco architecture.”

Industry infrastructure – much of the needed infrastructure is in place in Florida in terms of crew base, establishments that support all phases of production, desirable locations, film festivals, post-secondary educational programs, and film offices.

Existing production centers – Florida already has existing production centers in North, South and Central Florida. According to the Film Florida Production Guide and InfoUSA, Florida has the following infrastructure in place:

Backlots	8
Foley Stages	7
Insert Studios	59
Virtual Studios	8
Warehouse Space/Raw Space	15
Photo Studios	78
Recording Studios	76
Sound Stages	57
Television Studios	44
Motion Picture Film Labs	2
Special Effects Companies	5

Government support – there is an established film office and film liaison infrastructure within Florida. Florida’s film office is housed in the Governor’s office and there are 54 local film liaisons located throughout the State. Florida is also the only state with a full time Los Angeles film liaison.

Cost advantage – shrinking, but Florida still has a cost advantage over larger production centers such as New York and Los Angeles.

Weather – Florida has the climate for year around shooting and is known for the quality of its light

Longevity – Florida has a long history within the Film and Entertainment Industry in part because it provides a strong tourism infrastructure that provides activities for industry participants when filming or residing here.

Weaknesses

Inconsistent production incentives – Florida’s inability to fully fund its incentives programs makes it difficult for production companies to factor these into long range plans. Florida’s current incentives structure relies on annual appropriations and recent budget issues have severely impacted the amount of incentive money available.

Operational effectiveness of infrastructure – Florida has a legacy infrastructure that may not be meeting current industry demands. The ability to upgrade infrastructure is limited by low production activity caused partially as a result of inconsistent incentives. Lack of production restricts the inflow of needed capital as well as limiting on-the-job training opportunities for Florida’s workforce.

Loss of reputation and “brand” name – most who were questioned in the film industry were not impressed with Florida as either a location for filming or as a state with a vibrant film and entertainment industry. Florida is seen as too removed from either California or New York to be a “player”. This viewpoint is particularly interesting given Louisiana’s rise within the film industry.

Marketing - professionals were unaware of existing incentives or felt incentives were only for large productions. Florida is seen as lacking a good film infrastructure – again interesting given the size of the state’s production centers.

Hurricanes – recent severe seasons have brought this issue to the forefront

Geography – insurance costs for productions increase for areas within 100 miles of the ocean. There is no place in Florida that is over 100 miles from water.

Labor Rates – the current structuring of labor rates by unions, such as IATSE, results in wages rates some \$5.25 to \$6.00 per hour higher on productions taking place in Florida as compared to neighboring and competing states. There is also an existing perception that unions are difficult to deal with in Florida.

Opportunities

Low entry barriers – increased usage of digital technology also translates into decreased start-up costs for businesses within the industry.

Learn from others – many states and their indigenous businesses are wrestling with the same problems as Florida. This presents an opportunity to observe what works (and what doesn’t) for them and see if it is applicable in Florida.

Niche markets - Niche marketing is how businesses maximize their profits and provide product to specific interest groups in all sectors of the economy. Florida has an opportunity to examine its

competitive advantage in providing content to niche markets that currently exist and will exist in the future within the Film and Entertainment Industry. One market for consideration is the international growth of the Indian film industry.

Digital - Digital technologies represent an industry wide opportunity, and Florida businesses have the opportunity to, as mentioned in the 2006 study, be the “grandfather” in the industry. Florida is already taking steps in this area by establishing digital media as one of its Employ Florida Banner Center industries. Florida is also home to a strong defense and simulation industry, creating opportunities for synergy where these industries overlap. Currently, Tiburon, a large video game developer, makes its home in the high tech corridor of Central Florida. With the projected growth in digital technology within the industry, Florida has the opportunity to investigate incentives tailored toward attracting and retaining these businesses.

Spanish language workforce— Florida is home, according to the 2000 Census, of the third largest Spanish speaking population in the United States. This presents an obvious source of workforce for the production of products tailored to the Spanish language market.

Threats

Other states – Many other states have discovered the desirability of having a strong film industry and attracting location shooting. For example, New Mexico offers a loan, with participation in lieu of interest, for up to \$15 million (which can represent 100 percent of the budget) for qualifying projects. Michigan offers up to a 42 percent refundable tax credit. Additionally, because other states have less crew infrastructure, Florida based crew can go to these states and work at a higher level/higher paying job than they could get than if they worked on a Florida production.

Other countries – Many countries also offer production incentives and have similar types of locations as Florida.

Mobile industry –If there were an inherent advantage in having the motion picture production industry in a fixed location; it would never have left Hollywood. The industry and its workforce are mobile, and digital technologies are only increasing this mobility and eroding Florida’s workforce. Conversely, the mobility of the workforce also provides an opportunity for Florida to attract labor.

Special Threats

There are two threats to the Film and Entertainment Industry that are not unique to Florida, but are problems for the industry at large or for regions trying to enlarge their own Film and Entertainment industries. These are piracy and production incentives.

Film and Music Piracy

The entertainment industry has been a big user of digital technology, but this technology also represents a threat to the industry’s health. New ways of delivering content (such as the video iPod) mean new markets, but also increased risk of piracy. The piracy of copyright protected digital goods is a large and

growing problem in the music, computer software, videogame, and film industries. Digital piracy includes the purchase of counterfeit products at a discount to the price of the copyrighted product, and illegal file sharing of copyright material over peer-to-peer computer networks. Various studies have looked at the impact of the pirating of music and filmed entertainment, and have reached differing conclusions. A few of the more recent studies are listed below.

Using the RIMS II mathematical model maintained by the U.S. Bureau of Economic Analysis (BEA), the analysis in this study estimates the impact of motion picture piracy in the United States on economic output, jobs, personal income, and tax revenues to be \$20.5 billion in total lost output, \$5.5 billion in lost earnings, 141,030 jobs and \$837 million in lost tax revenue. (Siwek, September 2006)

As a consequence of global and local piracy of motion pictures, this study found the economy of New York State loses \$3.72 billion in total output annually, \$1.494 billion in motion picture industry revenues, 22,986 jobs, \$903 million in earnings, and \$50 million in sales tax revenue. (Siwek, May 2006)

One study found that illegal music downloads have had no noticeable effects on the sale of music. The study looked at 2002 data from the logs of two P2P servers and compared them to sales data from Nielsen SoundScan and concluded that the effect on legal music sales was not statistically distinguishable from zero. (Oberholzer-Gee, 2004)

This study, by LEK Consulting LLC, found that U.S. movie studios are losing about \$6.1 billion annually in global wholesale revenue to piracy. Based on a survey that was conducted over 18 months in 28 countries that specifically asked consumers how many of their pirated movies they would have purchased in stores or seen in theaters if they didn't have an unauthorized copy, the study estimates for piracy losses ran from \$280 million in China to \$275 million in Russia and were believed to total almost \$1.3 billion solely in the U.S.

This study developed and estimated a statistical model of the effects of piracy on the box-office performance of a widely-released movie. The model discredits the argument that piracy increases sales, showing unambiguously that Internet piracy diminished the box-office revenues of a widely released motion picture while overcoming a major weakness of counterfactual or "but for piracy" methods widely used to estimate damages that forecast what the movie would have earned in the absence piracy. The model presented estimates that pre-release and contemporaneous Internet downloads of a major studio movie accelerated its box-office revenue decline and caused the picture to lose about \$40 million in revenue. (De Vany and Walls, August 2007)

Results of the study suggested that, for users of peer-to-peer systems, piracy reduces the probability of buying music by 35% to 65% and that online music piracy may explain a drop in music sales of 7.8% to 14.5%. (Zentner, 2003)

As a consequence of global and U.S.-based piracy of sound recordings, the study found that the U.S. economy loses \$12.5 billion in total output annually, 71,060 jobs, \$2.7 billion in earnings and a minimum of \$422 million in tax revenues annually. (Siwek, August 2007)

An independent report indicates that movie piracy cost the film industry in Australia in excess of \$230 million in potential revenue in 2005. The illegal distribution of unauthorized copies of movies rose from 4% in 2000 to around 11% of the legitimate market in 2005. Discs seized by police comprise mostly DVD-R copies made in Australia as DVD-R technology has increased its share of the pirate optical disc market. In addition, Australian Customs seized more than 40,000 pirate DVDs imported into Australia in 2004, a 185% increase compared to the 14,000 seized by Customs in 2003. (Australian Federation Against Copyright Theft)

The Korean Film Council (KOFIC), which says industry losses to piracy stood at \$1 billion in 2007, more than three times the 2005 total. Putting the rise mostly down to an increase in online theft, the report estimates the counterfeit DVD market is worth \$41 million and illegal download market \$129 million in South Korea, based on a film consumer survey conducted by KOFIC.

Florida Losses to Film and Music Piracy

The difficulties in estimating economic losses from film and music piracy are several. First, there is the assumption that sales of counterfeit products or free unauthorized downloads represent lost sales to the legitimate industry. However, some research suggests that this may not be the case and those parties may simply be non-buyers if these outlets were not available to them. Other research, such as that conducted by LEK, refutes this claim. Additionally, it is assumed in some estimates that all pirated products injected no money into an economy. To the extent that no payments take place, this is correct; however, again, if products are purchased, even from counterfeiters, money will circulate into the economy, although it won't be flowing through the legitimate industry.

It is estimated that households in Florida spend approximately \$2.9 billion dollars annually on movie admissions, purchases of videos, music CDs and DVDs, and rentals of videos and DVDs. LEK Consulting in its study for the Motion Picture Association estimated a 7 percent piracy rate for the US for motion pictures and Zentner estimates a 7.8% to 14.5% drop in music sales from online piracy. Using the LEK figure and the lower estimate from Zentner, it is estimated that Florida industry losses to piracy annually exceeds \$211 million. This results in an estimated annual economic cost to Floridians of over \$334 million in output, \$126.8 million in value-added and some 1,524 jobs. Of these, 618 jobs would be in the motion picture industry, record producing and video rental business; the rest would be in other industries.

Reducing Piracy

According to a 2007 study in digital piracy, there are seven strategic responses that copyright holders can pursue to reduce the impacts of piracy: (1) adopt a permissive stance to piracy, (2) counter piracy by providing free samples, (3) lower the price of the legal good, (4) offer something extra to consumers who purchase the legal good, (5) switch to a business model that is less vulnerable to piracy, (6) embrace the technology used by pirates (such as peer-to-peer networks), and (7) increase the perceived moral intensity associated with the decision to participate in the market for pirated products.

State governments can assist in the latter strategy by increasing criminal penalties and providing educational programs on the effects of intellectual property piracy. For example, many colleges have not

yet adopted comprehensive policies to combat music piracy on their campuses, according to a report by a group of college officials and music-industry leaders. Colleges that have done so, the report says, use a variety of approaches, from blocking all file sharing to requiring students to sign a pledge that they will honor copyright laws. A report cites with approval the aggressive efforts by a number of institutions to educate students about the risks of trading copyrighted music. Among them are a software program at the University of Florida that attempts to block all peer-to-peer transfers; a series of educational videos and radio spots at the University of Wisconsin at Madison; and a requirement at Purdue University that students sign an acceptable-use policy before they are given access to campus computer networks. These actions have the added benefit of reducing University costs and bandwidth usage for non-educational purposes.

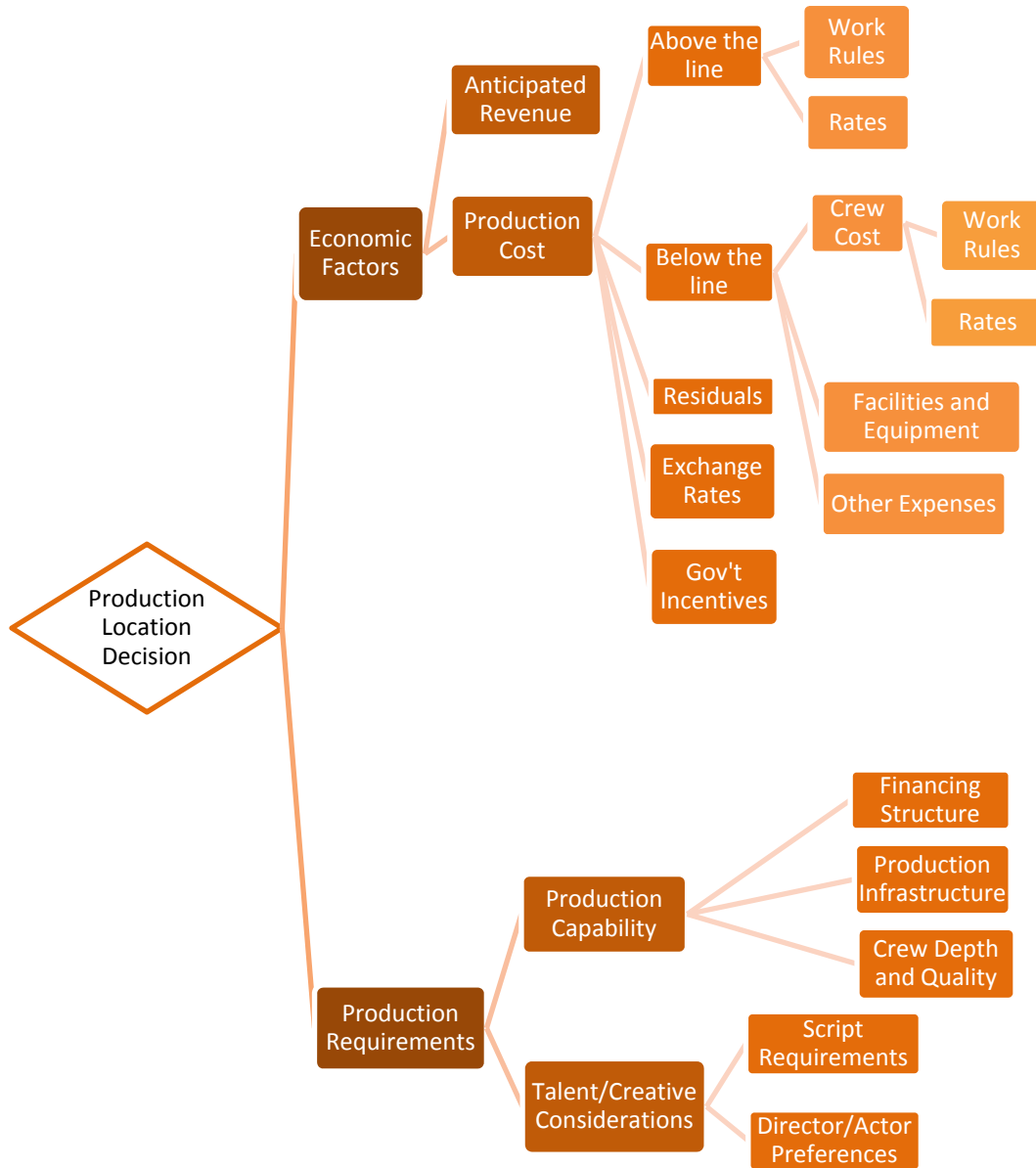
Production Incentives Comparison

Film production is a high-wage, labor-intensive business, employing skilled workers and large numbers of local self-employed technicians, caterers, actors, laborers, and technical crews. It is heavily dependent on the hospitality industry to maximize the quality of its temporary residence and brings a "home-base cost-of-living" requirement into the expected quality of life on location. In addition to immediately enhancing the local business environment, production brought in from out of state on a regular basis can serve to accelerate training in a local economy to provide future technical and skilled workers in this sector.

A 2005 study on film production incentives, quoting a research firm specializing in analyzing the economic impact of a movie production in a local community, estimated that, on average, a television production spends approximately \$85,000 a day on location for a 7- to 14-day shoot for a single episode. Feature films spend over \$100,000 per day, and low budget productions and documentaries average between \$15,000 and \$35,000 per day. Television commercials average between \$50,000 and \$100,000 per day, and still shoots run around \$25,000 per day.

The film production industry has a vast range of locales in which to conduct their business, thus making it to a state's advantage to try to influence market demand in that sector. Contiguous states and regional opportunities, as well as a range of other U.S. or even foreign sites, are available as a potential business setting for film, T.V., video, or commercial productions. Since there is no fixed physical facility, the restrictions of location are governed by many factors. See Figure 23.

Figure 23 - Production Location Decision Factors



Competition is strenuous within the industry, and thus production companies seek locations that provide the best overall resource structure--financial, tax, human, work environment, community, regulatory, amenities, and low bureaucracy. In the lexicon of economic development, film production is a "But For" business--but for the attraction of a local community's resource structure, there will be no project. According to a 2005 study comparing film production incentives, the challenge for state and local film production promotion efforts is to develop strategies that compete with "best practices" yet have policies that grow the industry while minimizing "pirating" from other areas and avoiding "giving away the store" in financial and tax incentives.

As a result of favorable exchange rates and substantial financial incentives, the United States began losing large amounts of film production revenue to Canada and other countries in the 1990s. This trend, referred to as “runaway production”, was perceived to be the result of calculated efforts by the governments of Canada, Australia, New Zealand, Mexico, and many Eastern European countries to lure productions and all their related expenditures out of the states. The theory was that incentives coupled with a favorable exchange rate would pull US on-location filming into other countries and grow their indigenous industry. See Table 56.

Table 56 - International Film Production Incentives 2008

Country	Incentive Type	Amount
Australia	Tax Credit (Content)	15%
	Tax Credit (Prod. Services)	40%
Belgium	Tax Deduction	150% deduction
Fiji Islands	Tax Credit	15%
France	Tax Credit	20%
Germany	Cash Rebate	15 – 20%
Hungary	Tax Assistance	20% of costs
Iceland	Cash Rebate	14%
Ireland	Tax Assistance	20%
Isle of Man	Equity Investment	25% of budget
Luxembourg	Cash Rebate	30%
Malta	Cash Rebate	15 – 22%
Mexico	Tax Assistance	100%
New Zealand	Grant	15% of budget
Puerto Rico	Investment Tax Credit	40%
South Africa	Cash Rebate	15% Foreign Prod. 35% S.A. Prod.
United Kingdom	Tax Credit	20 – 25%
US Virgin Islands	Tax Assistance	90%

Source: Borden Ladner Gervais LLP

A 2002 report by the Center for Entertainment Industry Data and Research (CEIDR) estimated the economic loss to the U.S. Economy since the Canadian rebates at \$4.1 billion equating to an average of 25,000 jobs a year. In response, many states moved forward with incentive packages for the film industry in order to compete. Currently, 41 states offer some form of film production incentives. See Table 57. A complete listing of state film incentives is included in Appendix J.

Table 57 - US Film Production Incentives

Film Production Incentives								
		Sales Tax	Bed Tax	Content, Timing and/or	Infrastructure	Loan Fund or		Free Locations or
Rebate	Tax Credit	Exemption	Exemption	Location Bonus	Projects	Program	Grants	Services
Colorado	Alaska	Arizona	Idaho	Alaska	Arizona	New Jersey	DC	Florida
Florida	Arizona	Connecticut	Indiana	Florida	Delaware	New Mexico		Iowa
Maine	Connecticut	Florida	Iowa	Georgia	Louisiana	New York		Maine
Maryland	Delaware	Georgia	Kansas	Louisiana	Michigan			Montana
Minnesota	Georgia	Idaho	Montana	Michigan	New York			New York
Mississippi	Hawaii	Indiana	North Carolina	New York	North Carolina			South Carolina
New Mexico	Illinois	Kentucky	South Carolina		Oklahoma			Virginia
Oklahoma	Indiana	Maine	Utah		Tennessee			West Virginia
Oregon	Iowa	Maryland	Vermont		Wisconsin			
South Carolina	Louisiana	Massachusetts	Virginia					
South Dakota	Massachusetts	Minnesota	Washington					
Tennessee	Michigan	Mississippi	West Virginia					
Texas	Montana	New Jersey						
Utah	New Jersey	New Mexico						
Virginia	New York	New York						
Washington	North Carolina	North Carolina						
Wyoming	Pennsylvania	Oklahoma						
	Rhode Island	South Carolina						
	West Virginia	Texas						
	Wisconsin	Utah						
		Vermont						
		Virginia						
		Washington						
		West Virginia						
		Wisconsin						

Note: Income tax incentives are offered by Louisiana (expires 1/2009), North Dakota, Oklahoma, Vermont, Wisconsin
 Property tax incentive is offered in Connecticut
 Wage reimbursement for on-the-job training is offered in New Mexico
 Discounts and Deals Program is offered in Florida

Impact of Film Production Incentives

Gauging the net impact of film production incentives on a state’s total employment is difficult. In a 2006 policy brief on the topic from the Federal Reserve Bank of Boston, the author identified four factors that created analytical problems in attributing economic growth to offered incentives. First, there is the issue of not knowing precisely how many people the film industry would employ in the absence of incentives. Second, the multiplier effects of film incentives, like those of all economic activity, are hard to track in a complex, developed economy like that of the United States. The long term impact resulting from increased state exposure and improved image is especially difficult to isolate and measure. Third, the additional jobs attributed to the film incentive may go to individuals hired away from existing firms, not to people who are unemployed or attracted from other states. Fourth, because employment in the film industry consists mostly of a series of short-term discrete projects, analysts have difficulty determining the extent to which each part-time job is filled by a different person, or the same worker moves from project to project (a distinct possibility in film and television production).

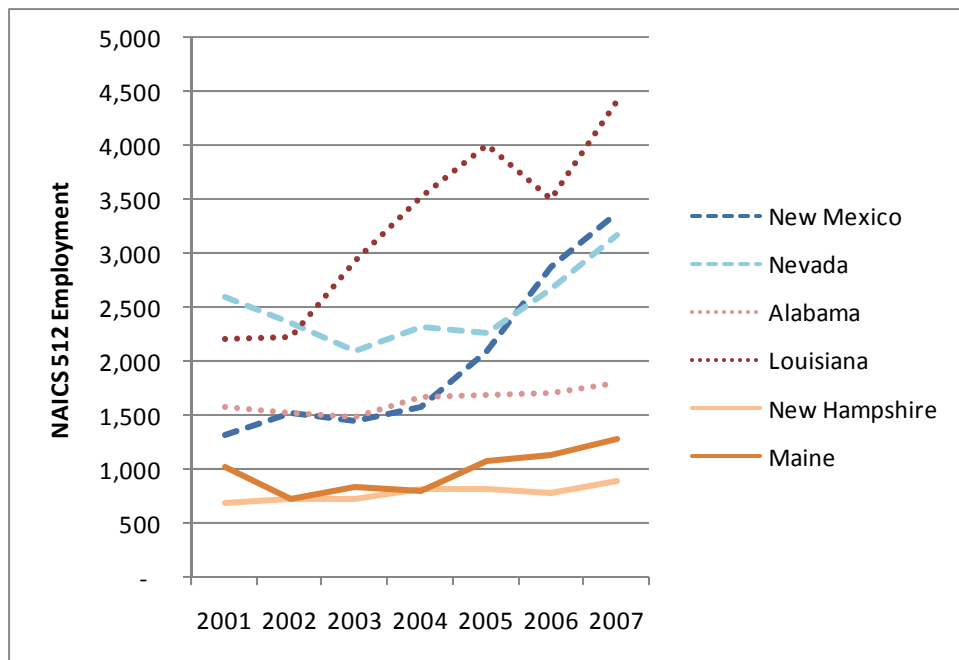
Recently, Ernst and Young completed an analysis of the economic and fiscal impact of the New Mexico Film Production Tax Credit. In it the economic and fiscal impact examination of the state’s tax credit looked at three categories of spending as the economic activity generated by the tax credit. These

categories were 1) total production expenditures, including those qualifying for the credit and those not qualifying; 2) capital expenditures within the state attributable to the industry; and 3) tourism spending attributable to visitors coming to the state because they had seen it in a film. Taken together, these produced a \$1.50 return on every dollar invested in the tax credit.

While sufficient data does not exist to duplicate the New Mexico study for the Florida Film and Entertainment Industry, Florida’s total production numbers (the only numbers available comparable to what were used in the New Mexico study) were entered into IMPLAN model. Using the total production expenses reported in the 2007 sales tax report of \$816,462,452 for both in state and out of state companies, tax revenues (before consideration of the sales tax rebate) of \$29.6 million were generated by this spending. This represents a \$1.60 return for every incentive dollar spent return. In other words, the state receives back it’s dollar plus an additional 60 cents.

Another way to roughly look at the impact incentives have had is to compare the employment in the Motion Picture and Sound Recording (NAICS 512) industries in states with similarly sized population and geographic location, where one has a film production incentive in place and one does not. Figure 24 below shows employment for three pairs of states from 2001-2007. These pairs consist of New Mexico and Nevada, Louisiana and Alabama, and Maine and New Hampshire. In each case the first state listed has a film production incentive program in place, the second has no program.

Figure 24 - Incentive Employment Comparison in NAICS 512 in Selected States



Source: Bureau of Labor Statistics QCEW Program. Note: Alabama’s film production incentive program lapsed in 2006.

In each case, the state with a film production incentive in place was able to grow its resident film industry infrastructure more rapidly than those states without an incentive. While these observations are far from conclusive, they suggest that film production incentives have a positive impact on employment growth.

This is further reinforced by examining job growth in the Motion Picture and Sound Recording industries (NAICS 512) between 2006 and 2007. According to the Bureau of Labor Statistics, a total of 5,118 jobs were created in the industry in the 50 states between 2006 and 2007. For analysis purposes, these jobs were distributed among the states based on the size of the existing workforce, thus generating the number of “Expected” new jobs. This figure was compared to the “Actual” number of new jobs recorded in the state. Table 58 illustrates the shifting distribution of industry workers amongst selected states.

Table 58 - Expected versus Actual Job Growth Comparison in NAICS 512

	Expected Jobs	Actual Jobs
California	2,076	1,237
New York	632	(197)
Florida	195	368
Georgia	89	(151)
Virginia	68	354
Massachusetts	63	510
Maryland	62	322
North Carolina	62	111
Louisiana	48	908
New Mexico	39	509
Nevada	37	489
Connecticut	30	830
South Carolina	25	283
Pennsylvania	95	225
Mississippi	14	(10)
Rhode Island	13	(386)

Again, these figures suggest that robust film incentives can have a positive impact on employment in the film industry and are creating a shift in employment away from the historic major production centers.

Production Cost Comparison

To assess the competitiveness of Florida's incentives with those of selected competing states and Canada, the budget of a medium budget feature film (\$20 million) developed and financed by a California studio, was translated to conditions in Connecticut, Florida, Georgia, Louisiana, Mississippi, New Mexico, New York, North Carolina and South Carolina, as well as Toronto, Canada.

The first step in this comparison was to adopt identical assumptions for all locations to achieve comparative full production budgets, factoring in the applicable currency exchange to the US dollar for Toronto, Canada and different wage rates for the US and Canada obtained from the Showbiz Labor Guide.

Characteristics of a Representative Medium-sized Film:

- Financed and budgeted in US dollars; exchange rate of 84 cents to the US dollar for Canada
- Production takes advantage of all available incentives, including bonus incentives for shooting at particular times of the year or particular locations within the state
- Costs are split 30% above the line; 60% below the line and 10% post-production
- \$1,000,000 in local purchases made that are subject to sales tax
- Development occurs in California
- Pre-production, Production and Post Production occurs in the state of choice
- Producer(s), lead Actors, Director, Production Designer, and Director of Photography are California residents, remaining Cast, Extras, Below the Line crew and Post-production are local
- No completion guarantee as internally financed by the studio
- Insurances provided in the US under blanket studio policy
- Budgeted in Canada as a shoot in the city of Toronto
- Budgeted in United States as a shoot in most favorable location for incentives in that state

The differing wage rates and the film production incentives available in each state and Toronto, Canada for the qualifying project were then applied to the \$20 million California budget to calculate a net cost of production. The results are shown in Table 59.

Table 59 - State Film Production Cost Comparison

State	% of California cost	Budget
California	100%	\$ 20,000,000
New York	94%	\$ 18,838,462
Florida	88%	\$ 17,663,378
Connecticut	82%	\$ 16,414,201
North Carolina	80%	\$ 15,955,495
New Mexico	76%	\$ 15,159,055
South Carolina	74%	\$ 14,706,309
Louisiana	73%	\$ 14,699,055
Mississippi	72%	\$ 14,351,319
Georgia	69%	\$ 13,794,016
Toronto, CA	68%	\$ 13,691,642

8 week shoot

\$ 6,000,000	ABTL
\$ 12,000,000	BTL (includes \$1M in purchases)
\$ 2,000,000	Post-Production

Assumes all qualifications for expenditures have been met.

Doesn't include discount programs

Doesn't include bed tax exemptions

Assumes Canadian shell company used to earn tax credit

Assumes requirements for bonus incentives met

Assumes incentive programs fully funded.

As seen, Florida production costs are high compared to competing states, even with existing state incentives.

Strategy

There have been previous studies undertaken of the Florida Film and Entertainment Industry, and these provide a useful context in determining strategies for the industry moving forward. For example, in a 1987 publication called *Lights! Camera! Florida! – Ninety Years of Moviemaking and Television Production in the Sunshine State*, the study author Dr. Richard Alan Nelson listed eight factors that had made a stable, broadly based film and video industry possible in Florida. These were:

1. Long term growth in demand for new film and video products by industrial as well as consumer-oriented clients
2. The demise of the old studio system and the rise of the independent producer
3. The convenience afforded by rented, mobile technologies and improved film stocks, resulting in more location shooting – particularly for television commercials
4. Cheaper production costs (averaging 10-40% below California) because of right to work laws and union conditions

5. Locally experienced crew, extras and support personnel ranging from labs to caterers
6. Successful on location experiences resulting in positive word of mouth from independent producers working in the South
7. Aggressive marketing by the state and city film-television commissions, providing valuable assistance from red tape cutting to location scouting services
8. Increased local financing

Many of these factors are still true today for a successful indigenous industry. In 2006, the Tourism Committee of the Florida House of Representatives State Infrastructure Council authored a report entitled *Florida's Entertainment Industry Infrastructure: Are We Growing the Indigenous Industry as well as Supporting Production?* This report looked both at the state of the industry within Florida as well as the operations of the Governor's Office on Film and Entertainment (OFE). The study put forward the following conclusions:

- Other states are aggressively pursuing various aspects of the entertainment industry through a variety of incentives. These incentives have and will continue to impact the amount of production that the state is able to bring in and the amount we are able to keep in the state.
- Some of the states with aggressive incentives, such as Louisiana, do not have the established infrastructure that Florida has. These states, however, are also aggressively pursuing building of an infrastructure, buildings and people, to support the industry base. Erosion of a well-known, marketable draw to a state for business needs to be avoided.
- The current financial incentive of the state, although extremely successful, should be reviewed and modified to make it more competitive while retaining the integrity of the incentive to benefit the state and our industry and crew. Issues raised included threshold level of the incentive acting as a disincentive; adequacy of the incentive regarding commercial production, television pilots and series, and independent productions; perception of uncertainty of funding acting as a disincentive to doing business in the state; and ineffectiveness of the incentive for digital media effects and business relocation.
- The use of a transferable corporate tax credit versus annual appropriation should be reviewed to determine if this will ameliorate concerns regarding the state's incentive and will bring more to the state on a long-term basis.
- There is a need for a strategic plan for growth of the entertainment industry sector in the state which includes specific steps for growing our indigenous industry. This should be a roadmap developed by OFE in conjunction with EFI, Workforce Florida and appropriate university, college and community college programs. Local film commissions and persons in the industry should be involved as well.
- The variety of incentives that encourage independent production and indigenous industry growth that are being used in other states should be reviewed to determine if these could help benefit Florida.
- Florida is the only state that statutorily specifically excludes electronic gaming from its incentives. Florida should examine how this industry fits into its plans. [This item has been addressed since this report was issued.]

- The sales and use tax exemption does not include raw stock film and videotapes. This should be reviewed.
- The use of film festivals as distribution hubs for independent filmmakers should continue to be explored.
- The post-secondary institutions should come together to establish cooperative programs between institutions designed to focus on specific needs of the workplace or on critical needs in professional infrastructure in the entertainment industry
- OFE needs to be fully staffed and funded to make a continual positive impression on the industry and aggressively marketing our state to the world.

Many of these recommendations have been enacted and the others are being considered. In addition to Florida's studies on the industry, other states have also looked at the problem of growing an indigenous film industry. Many states are adopting strategies to make it easy to create, produce, and distribute film and other media productions from start to finish within their borders. State strategies that have proven successful include the following:

- Offer financial incentives to attract film industry activity, such as tax credits on in-state expenditures;
- Support the development of a state workforce with the skills to contribute to film activity through university-based and other training programs;
- Market the state to the film industry through state film office Web sites and other means;
- Facilitate the film production process in the state by creating production guides or providing scouting programs; and
- Cultivate local film activity and audiences by encouraging homegrown filmmaking and supporting film festivals and other events that engage the community.

Florida is among those states that have used these strategies. Other states have also looked at developing additional strategies to continue to grow their local film, entertainment and digital media industries. In late 2007, early 2008, for example, Connecticut organized a task force to make recommendations for creating a sustainable film and digital media industry. The task force recommendations covered six major strategic areas – marketing, organizational strategy, workforce development, financing, physical infrastructure, and industry niches. Some of the ideas put forth are already in place in Florida, but new suggestions include: creation of a data base on film resources and educational opportunities (i.e., regional guidance counselor); provision of venture capital financing for films; funding of the adaptation of abandoned structures for film-related production uses; promotion of shared facilities (e.g., production company and college sharing a studio); and the designation of media development zones.

Infrastructure Development

One question that was raised in the 2006 Florida report was the sufficiency of the state's infrastructure. Many states are actively seeking to develop Film and Entertainment Industry infrastructure. More recent projects include the following:

Louisiana

River Studios and Film Port (scheduled to open in 2009) will be a 925,000 foot state-of-the-art film, television and digital media complex. The 100-plus acre comprehensive world-class studio will offer full production, post production, and ancillary support buildings and services, production offices, film and television stages, set construction, painting and welding tunnels, wardrobe and property departments, camera rentals, grip & electric, location services, SFX, pyro, film laboratory, wave and water tank, indoor pit, film and television crew training school, crew housing, talent lodging/hotel, and over 100 acres of prime Mississippi River frontage shooting access. <http://www.studiocitylouisiana.com/>

This Spring, Millennium Films broke ground in the Shreveport Louisiana's Ledbetter Heights neighborhood on the first phase of a full-service studio, which will eventually comprise 20 acres and include three sound stages. "They'll get a huge incentive from the state for doing that, because they are creating a permanent residence here to make movies," says Ryan Glorioso, a casting director in Shreveport. (The state tax credit for infrastructure development is 40 percent, 25 percent for film production.) <http://www.backstage.com>

New Mexico

Film Maker Production Services Co. opened in October 2008 in Albuquerque, offering everything from vintage military uniforms to fake food, antique lighting, elaborate drapery and presidential portraits for film and television productions, as well as local theatrical companies. The parent company of Film Maker Production Services is NBC Universal, which also has another subsidiary firm, New Mexico Lighting & Grip Co., housed at Albuquerque Studios.

<http://www.bizjournals.com/albuquerque/stories/2008/10/20/daily44.html>

North Carolina

The 50-acre EUE/Screen Gems was built in the 1980s by Dino De Laurentiis, taken over by Carolco and then passed to its current owners in 1996. In October 2008, the studio broke ground on Dream Stage 10. The new stage will be 37,500 square feet and 45 feet high with dimensions of 150 feet by 250 feet. It also will be home to a massive indoor water tank that's 10 1/2 feet deep, measures 60 feet by 60 feet and holds 283,000 gallons. The studio boasts that it will be the largest and deepest indoor water tank in North America. <http://www.ncfilm.com/news/225/110.html>

Georgia

The Historic Senoia Project is a downtown re-development initiative within the Historic District of the City of Senoia, Georgia, undertaken by the principals of Riverwood Studios Inc. Many of the vacant parcels of land in Senoia's Historic District have been acquired for the purpose of constructing period

infill development, designed to blend seamlessly with the town's existing architecture set between the late 1800's and the early 1900's. The project will act as a 'live back lot' for future film and television projects. <http://www.historicsenoia.com/index.html>

South Carolina

In August, 2008, Columbia, SC saw the grand opening of Genesis Studios. The 15,000 square foot facility is intended to be a creative person's dream. President Cliff Springs stated, "We want to thoroughly enjoy coming to work every day, and we want our clients to feel the same way when they come to visit." Among the highlights are two sound stages, a master control suite, multiple edit suites, a creative brainstorming area, and a 25-seat movie theater with 7.1 surround sound.

<http://www.genesisstudiossc.com/>

Texas

Recently the State of Texas began crafting together legislation authorizing an increase in financial and tax-relief incentives to studios and producers in hopes that it will influence their decision on Texas as a location for their next project. Astrodome Studios represents a plan to turn the former stadium into a major sound stage and movie production studio. It is hoped that by providing such a facility, Texas can significantly influence production location choices by offering a large state-of-the art production studio complete with all the needed technicians and crafts people.

<http://www.astrodomeproductionstudios.com/>

While Florida already has a significant film industry infrastructure in place, there is a question as to its sufficiency to attract the film industry for location shooting purposes. There has been no new sound stage construction since the completion of Universal Studios and Florida economic development incentives that provide for physical plant construction are difficult for the industry to use. With other states building new "state of the art" facilities, there is a question as to how older facilities will be able to compete.

Workforce Development

Connecticut's 2008 Hollywood East task force identified the following goals that would need to be addressed for that state to satisfy the film industry's workforce needs:

- Create and develop a workforce able to meet the industry's demands
- Develop the skills for entry level and on-site jobs
- Involve entertainment unions in developing and implementing the workforce policy
- Encourage partnerships between theaters and entertainment organizations
- Create higher education programs via technical schools, 2-year, and 4-year colleges and universities
- Make the workforce flexible to meet the industry's changing needs.

Florida already offers extensive degree programs at its universities and community colleges. Florida is home to Full Sail University, offering undergraduate and graduate degrees in the entertainment business, computer animation, digital art and design, film making, game development, and web design. Throughout the entertainment industry, Full Sail graduates have made their names working on award-winning films and albums, acclaimed video games and design projects, live productions, working inside major media companies, and more. Digital effects companies from across the country are known to recruit graduates from Ringling College in Sarasota, and major programs, such as the Florida Interactive Entertainment Program at the University of Central Florida, are available at Valencia Community College, Florida State University and the University of Miami. Ringling College is slated to offer a Digital Filmmaking major beginning in August, 2009. At the high school level, Florida offers career academies, small, personalized learning communities within a high school that select a subset of students and teachers for a two-, three-, or four-year span, in 3D animation, television production, new media technology and digital media. Thus unlike states trying to enter the film industry, issues with workforce development in Florida have more to do with providing jobs and workforce experience within the state than a lack of training programs.

Financing

Out of necessity, films are now financed in a variety of complex ways including major studio backing, joint ventures, outside private or public investors, limited partnerships and pre-sales of ancillary and distribution rights, among others. Regardless of how a film is financed, though, all parties involved normally have a good idea of the principal revenue-producing areas from which their investment will be recouped and, they hope, a profit made. They usually are also familiar with the various stages of production that ultimately lead to the release of a finished motion picture.

The majors include Paramount Pictures, Sony Pictures Entertainment, Walt Disney Picture Studios, Twentieth Century Fox (News Corp.), Universal City Studios, and Warner Bros. Entertainment (Time Warner). They produce, finance, and distribute their own films. They also finance and distribute pictures initiated by independent film-makers who either work directly for them or have projects picked up after some progress has been made. Smaller, independent production companies feed their (typically less commercially oriented) productions into the established distribution pipelines of larger companies, or have mini distribution organizations of their own. A third group, the so-called “mini-majors,” has become a more significant force. Companies in this group generally have production and distribution capabilities, but their activities tend to have less scope.

With only 20 to 30 percent of films making money or breaking even, financing a film project is a risky endeavor. Professional reputation can be a major survival factor in acquiring financing as much as a sound project. States seeking to grow their indigenous industry must be seen as part of the selling point of a production package. Some states meet this challenge by offering production financing programs. New Mexico, for example, offers a 0% loan, with backend participation in lieu of interest, for up to \$15 million per project (which can represent 100% of the budget) for qualifying feature films or television projects - animation included. Terms are negotiated and project budget must be at least \$2 million. New Jersey offers a loan guarantee program. The Film Production Assistance Program allows film projects to

be eligible for loan guarantees through the New Jersey Economic Development Authority. Loan guarantees cannot exceed 30% of the bank financing cost of the project, or \$1.5 million, whichever is less.

Florida currently offers no such programs, although this type of production incentive has been considered.

The Bottom Line

The following conclusions are made as a result of the analysis undertaken in **this** report:

- There must a solid business case for choosing to film on location in Florida as well as a solid business case for operating facilities in Florida if the indigenous industry is to survive.
- While acquiring location shooting is attractive, it has become highly competitive and may not be a sustainable market for Florida. All things being relatively equal, productions are going to locations with the best incentive packages.
- A locally sustainable industry provides the best opportunity for economic development and employment growth, be it either in production, post production or game development.
- In an effort to be all things to everyone, a Florida location may turn out to mean little to anyone. Florida needs to focus its efforts on finding what makes “Filmed in Florida” a good thing or what makes Florida the place to shoot.
- Spanish language production is an obvious growth market for Florida.
- Attraction of film financing companies and/or the establishment of a loan fund may be keys in redeveloping the indigenous industry.
- Digital production, post-production and the gaming industry have the greatest growth potentials and may be the best target for incentive dollars.
- The conclusions listed in the 2006 Tourism Committee of the Florida House of Representatives State Infrastructure Council report, in so far as they have not already been addressed, are still valid and need to be considered and/or incorporated into any strategic plan.
- If Florida wants to attract location filming, anecdotal evidence suggests it is going to have to match or better the most attractive incentive programs A Warner Brothers Worldwide executive commented in 2007, “in the past few years, financial incentives have overwhelmed the 'where to shoot' equation. Major studios and smart independents are going to locations that have the best incentives. It's as simple as that.” This would suggest that Florida incentives could include offering a choice between a cash rebate or a transferable tax credit; a low interest loan fund; an indigenous filmmaker loan fund; state paid internships for entertainment projects; and other such incentives not currently offered. These programs would need to be fully funded. Continued analysis should be performed to determine what level of incentive will produce the highest return on Florida’s investment in order to insure the cost effectiveness of the program.
- If Florida wants to attract post-production, it needs to focus on developing and redeveloping post production facilities by offering start up and expansion facilities with incentives assistance. With the projected growth in digital technology within the industry, Florida needs to investigate incentives tailored toward attracting and retaining these businesses. Currently, business has a

hard time accessing existing economic development incentives that support infrastructure development due to the project based nature of the industry. The State should look at modifying existing incentives to support bricks and mortar development in the Film and Entertainment Industry

- For long term stable industry growth, Florida may need to focus on niche markets within the broader Film and Entertainment Industry. This could particularly focus on Spanish language and other types of cable programming and television series as well as game development and Latin music.
- The concept of the “live back lot” may warrant further exploration in Florida as it tries to expand production centers to locations throughout the state. Florida has many communities with historic areas that could be suitable for this type of development and this type of development could prove suitable for infrastructure incentives.
- Florida’s existing target industry structure as it relates to IT companies should be examined as to applicability to digital media entertainment company development within the State.

Appendix A – Florida Regions

Northwest Region:

Bay, Calhoun, Escambia, Franklin, Gadsden, Gulf, Holmes, Jackson, Jefferson, Leon, Liberty, Okaloosa, Santa Rosa, Walton, Wakulla, Washington

North Central Region:

Alachua, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Lafayette, Levy, Madison, Marion, Suwannee, Taylor, Union

Northeast Region:

Baker, Clay, Duval, Flagler, Nassau, Putnam, St. Johns

Tampa Bay Region:

Citrus, Hernando, Hillsborough, Manatee, Pasco, Pinellas, Polk, Sarasota

East Central Region:

Brevard, Lake, Orange, Osceola, Seminole, Sumter, Volusia

South Central Region:

Desoto, Glades, Hardee, Hendry, Highlands, Okeechobee

Southwest Region:

Charlotte, Collier, Lee

Southeast Region:

Broward, Indian River, Martin, Miami-Dade, Monroe, Palm Beach, St. Lucie

Appendix B – Employment Comparison

The table below compares Florida QCEW data with Florida employment estimates produced by Economic Modeling Specialists, Inc. In order to capture a complete picture of industry employment, EMSI combines covered employment data from Quarterly Census of Employment and Wages (QCEW) produced by the Department of Labor with total employment data in Regional Economic Information System (REIS) published by the Bureau of Economic Analysis (BEA), augmented with County Business Patterns (CBP) and Non-employer Statistics (NES) published by the U.S. Census Bureau.

NAICS - Industry	QCEW FY06-07	EMSI 2007 Estimate
334612 – Prerecorded Compact Disc (except software), Tape, Record Reproducing	490	498
512110 – Motion Picture and Video Production	4,336	5,507
512120 – Motion Picture and Video Distribution	168	215
512191 – Teleproduction and Other Postproduction Services	375	448
512199 – Other Motion Picture and Video Industries	62	77
512210 – Record Production	90	186
512240 – Sound Recording Studios	334	663
512290 – Other Sound Recording Industries	146	294
515120 – Television Broadcasting	8,025	9,536
515210 – Cable and Other Subscription Programming	3,253	4,383
541810 – Advertising Agencies	9,176	16,369
541922 – Commercial Photography	653	1,279
711130 – Musical Groups and Artists	1,892	2,850
711410 – Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	633	4,213
711510 – Independent Artists, Writers, and Performers	2,911	55,470
All Film and Entertainment Industries	32,543	101,987

Note: QCEW is Florida FY 06-07; EMSI is for calendar year 2007.

Source: Agency for Workforce Innovation; Economic Modeling Specialists, Inc.

Appendix C – NAICS 512 Establishments and Employment Comparison – Top 30 States

NAICS 512 Motion picture & sound recording industries			Number of Establishments by Employment Size											
2006	2002		Annual	Total										
Employment Ranking	Employment Ranking	State	Employment	Establishments	'1-4'	'5-9'	'10-19'	'20-49'	'50-99'	'100-249'	'250-499'	'500-999'	'1000 or more'	
1	1	California	9,264,640	7,205	5,333	610	464	438	223	91	16	15	15	
2	2	New York	2,333,839	3,090	2,242	298	241	193	67	32	10	6	1	
3	3	Illinois	440,663	842	537	88	81	88	38	9	1	-	-	
4	6	Texas	320,334	978	540	120	106	128	57	27	-	-	-	
5	4	Florida	319,614	1,366	973	124	90	108	59	10	1	1	-	
6	5	Tennessee	183,568	537	358	68	45	46	16	3	1	-	-	
7	12	Pennsylvania	183,145	559	322	66	58	78	29	5	-	1	-	
8	10	Georgia	175,114	594	410	48	49	57	25	3	1	-	1	
9	7	New Jersey	157,217	516	348	43	43	51	24	6	1	-	-	
10	9	Virginia	153,002	392	229	48	33	46	26	10	-	-	-	
11	11	Michigan	125,143	459	237	51	79	65	22	5	-	-	-	
12	21	Missouri	98,198	287	142	41	46	39	14	5	-	-	-	
13	15	Colorado	97,883	433	292	50	31	35	19	6	-	-	-	
14	18	Minnesota	93,938	416	247	48	50	51	15	4	1	-	-	
15	20	North Carolina	85,551	404	237	47	42	63	14	1	-	-	-	
16	16	Maryland	80,044	329	216	31	20	39	21	2	-	-	-	
17	23	Oregon	66,166	259	152	32	35	27	11	2	-	-	-	
18	8	Connecticut	64,327	238	146	26	21	35	9	1	-	-	-	
19	19	District of Columbia	60,536	134	94	11	14	10	5	-	-	-	-	
20	22	Wisconsin	58,636	296	141	49	46	47	12	1	-	-	-	
21	26	Utah	56,877	255	157	29	26	27	10	6	-	-	-	
22	24	Arizona	50,965	269	172	28	18	28	17	6	-	-	-	
23	25	Indiana	50,539	304	160	35	39	52	18	-	-	-	-	
24	50	New Hampshire	42,486	69	36	9	10	10	2	2	-	-	-	
25	30	Alabama	33,537	159	84	18	26	19	11	1	-	-	-	
26	31	Kentucky	26,116	166	88	17	23	32	5	1	-	-	-	
27	28	Louisiana	25,682	145	87	16	15	16	8	3	-	-	-	
28	29	Oklahoma	24,736	168	81	27	31	24	4	1	-	-	-	
29	34	Iowa	23,450	181	75	34	41	27	4	-	-	-	-	
30	27	South Carolina	20,325	144	81	15	18	26	3	1	-	-	-	

Source: U.S. Census Bureau County Business Patterns

Note: Employment in NAICS 512 reflects the bulk of the Film and Entertainment Industry employment in 2006, excluding independent artists.

Appendix D – Production and Post-Production Companies by Region

Establishments							2003-07
Region	Description	2003	2004	2005	2006	2007	% change
East Central	Advertising – Motion Picture	5	2	1	1	1	-80.0%
	Animated Film Services	9	9	7	7	8	-11.1%
	Casting Directors	3	1	1	1	2	-33.3%
	Closed Captioning Service	0	0	0	0	1	N/C
	Editing Services – Motion Picture Production	1	2	4	4	4	300.0%
	Film Production Services	21	22	20	20	21	0.0%
	Film Studio Production Facilities	17	19	18	22	20	17.6%
	Lighting Film and Video	23	20	17	16	15	-34.8%
	Motion Picture Consultants	1	2	1	1	1	0.0%
	Motion Picture Equipment	6	4	5	5	5	-16.7%
	Motion Picture Equipment and Supplies	14	9	8	9	10	-28.6%
	Motion Picture Film Editing	1	1	1	1	1	0.0%
	Motion Picture Film Laboratories	1	1	2	1	1	0.0%
	Motion Picture Film Technicians	1	1	1	1	1	0.0%
	Motion Picture Location Services	1	1	1	1	1	0.0%
	Motion Picture Representatives	0	1	1	1	0	N/C
	Motion Picture Set Design and Costuming	8	6	5	5	5	-37.5%
	Motion Picture Special Effects	6	7	4	4	3	-50.0%
	Reproduction Services – Motion Pictures	17	15	15	11	13	-23.5%
	Video Post Production	3	2	2	2	4	33.3%
	Video Production Services	169	175	171	166	172	1.8%
East Central Total		307	300	285	279	290	-5.5%
Percentage Change			-2.3%	-5.0%	-2.1%	3.9%	
North Central	Film Production Services	3	4	6	5	3	0.0%
	Film Studio Production Facilities	1	1	1	2	3	200.0%
	Lighting Film and Video	1	1	0	0	0	N/C
	Reproduction Services – Motion Pictures	2	1	1	1	2	0.0%
	Video Production Services	25	24	26	31	32	28.0%
North Central Total		32	31	34	39	40	25.0%
Percentage Change			-3.1%	9.7%	14.7%	2.6%	
Northeast	Advertising – Motion Picture	1	1	1	1	1	0.0%
	Casting Directors	2	2	2	0	0	-100.0%
	Editing Services – Motion Picture Production	1	1	1	1	1	0.0%
	Film Production Services	3	1	1	0	1	-66.7%
	Film Studio Production Facilities	7	8	8	10	9	28.6%
	Lighting Film and Video	2	2	3	1	1	-50.0%
	Motion Picture Equipment and Supplies	2	1	1	1	0	-100.0%
	Motion Picture Film Distributors	1	1	1	1	1	0.0%
	Motion Picture Location Services	0	1	1	1	1	N/C
	Reproduction Services – Motion Pictures	8	12	13	12	11	37.5%
Video Production Services	62	71	77	78	74	19.4%	
Northeast Total		89	101	109	106	100	12.4%
Percentage Change			13.5%	7.9%	-2.8%	-5.7%	
Northwest	Advertising – Motion Picture	1	1	1	1	1	0.0%
	Animated Film Services	1	1	1	0	0	-100.0%
	Film Production Services	2	0	1	0	0	-100.0%
	Film Studio Production Facilities	2	2	2	2	3	50.0%
	Lighting Film and Video	4	4	4	3	3	-25.0%
	Motion Picture Set Design and Costuming	1	1	1	1	1	0.0%
	Reproduction Services – Motion Pictures	5	6	4	2	2	-60.0%
	Video Production Services	55	56	59	59	53	-3.6%
Northwest Total		71	71	73	68	63	-11.3%
Percentage Change			0.0%	2.8%	-6.8%	-7.4%	

Establishments							2003-07
Region	Description	2003	2004	2005	2006	2007	% change
South Central	Video Production Services	4	3	3	1	2	-50.0%
South Central Total		4	3	3	1	2	-50.0%
Southeast	Advertising – Motion Picture	8	9	8	6	6	-25.0%
	Animated Film Services	14	8	10	7	11	-21.4%
	Casting Directors	13	11	9	9	8	-38.5%
	Editing Services – Motion Picture Production	10	12	15	11	9	-10.0%
	Film Production Services	48	48	40	36	42	-12.5%
	Film Studio Production Facilities	137	117	138	140	126	-8.0%
	Lighting Film and Video	25	25	26	20	21	-16.0%
	Motion Picture Equipment	3	4	3	4	4	33.3%
	Motion Picture Equipment and Supplies	27	26	22	23	18	-33.3%
	Motion Picture Film Distributors	4	4	6	6	6	50.0%
	Motion Picture Film Editing	2	3	3	2	2	0.0%
	Motion Picture Film Laboratories	0	0	1	1	1	N/C
	Motion Picture Film Libraries	1	1	1	1	1	0.0%
	Motion Picture Film Scoring	1	0	0	0	0	-100.0%
	Motion Picture Film Technicians	1	1	0	0	0	-100.0%
	Motion Picture Location Services	5	7	9	5	7	40.0%
	Motion Picture Representatives	1	1	0	0	0	-100.0%
	Motion Picture Set Design and Costuming	3	2	3	3	3	0.0%
	Motion Picture Sound Services	1	1	1	1	1	0.0%
	Motion Picture Special Effects	1	2	2	1	1	0.0%
	Motion Picture Stock Shots	1	1	1	1	2	100.0%
	Reproduction Services – Motion Pictures	45	44	49	44	41	-8.9%
	Titling Service – Television and Motion Pictures	1	1	0	0	0	-100.0%
	Video Post Production	0	0	0	0	4	N/C
	Video Production Services	336	311	343	332	328	-2.4%
Southeast Total		688	639	690	653	642	-6.7%
Percentage Change			-7.1%	8.0%	-5.4%	-1.7%	
Southwest	Computer Animation	0	1	1	1	1	N/C
	Film Production Services	2	3	2	3	4	100.0%
	Lighting Film and Video	4	4	4	4	4	0.0%
	Reproduction Services – Motion Pictures	7	8	3	2	3	-57.1%
	Television Films Producers	0	0	0	0	1	N/C
	Video Production Services	55	58	55	55	54	-1.8%
Southwest Total		68	74	65	65	67	-1.5%
Percentage Change			8.8%	-12.2%	0.0%	3.1%	
Tampa Bay	Advertising – Motion Picture	3	4	3	4	4	33.3%
	Animated Film Services	2	3	3	3	3	50.0%
	Editing Services – Motion Picture Production	1	1	2	1	1	0.0%
	Film Production Services	16	16	21	20	20	25.0%
	Film Studio Production Facilities	0	0	0	1	2	N/C
	Lighting Film and Video	8	8	7	8	8	0.0%
	Motion Picture Equipment and Supplies	0	0	1	0	0	N/C
	Motion Picture Film Delivery	1	1	1	1	1	0.0%
	Motion Picture Representatives	1	0	0	0	0	-100.0%
	Motion Picture Set Design and Costuming	2	0	0	0	0	-100.0%
	Motion Picture Special Effects	1	2	1	1	1	0.0%
	Reproduction Services – Motion Pictures	16	23	25	24	15	-6.3%
	Television Films Producers	5	4	4	1	2	-60.0%
	Video Post Production	1	1	11	136	129	12800.0%
	Video Production Services	186	178	170	40	40	-78.5%
Tampa Bay Total		243	241	249	240	226	-7.0%
Percentage Change			-0.8%	3.3%	-3.6%	-5.8%	

Revenues						
Region	Description	2003	2004	2005	2006	2007
East Central	Advertising – Motion Picture	\$ 6,162,000	\$ 948,000	\$ 790,000	\$ 6,731,000	\$ 836,000
	Animated Film Services	\$ 115,866,000	\$ 53,380,000	\$ 51,810,000	\$ 51,810,000	\$ 54,950,000
	Casting Directors	\$ 1,044,000	\$ 348,000	\$ 348,000	\$ 498,000	\$ 996,000
	Closed Captioning Service	\$ -	\$ -	\$ -	\$ -	\$ 174,000
	Editing Services – Motion Picture Production	\$ 522,000	\$ 1,131,000	\$ 1,305,000	\$ 6,171,000	\$ 6,171,000
	Film Production Services	\$ 316,198,000	\$ 318,396,000	\$ 315,256,000	\$ 310,546,000	\$ 28,936,000
	Film Studio Production Facilities	\$ 29,754,000	\$ 26,376,000	\$ 23,031,000	\$ 32,464,000	\$ 32,778,000
	Lighting Film and Video	\$ 212,005,000	\$ 200,028,000	\$ 80,259,000	\$ 83,309,000	\$ 90,694,000
	Motion Picture Consultants	\$ 87,000	\$ 261,000	\$ 87,000	\$ 498,000	\$ 498,000
	Motion Picture Equipment	\$ 35,454,000	\$ 18,563,000	\$ 20,748,000	\$ 18,676,000	\$ 18,676,000
	Motion Picture Equipment and Supplies	\$ 52,905,000	\$ 46,258,000	\$ 27,192,000	\$ 42,073,000	\$ 40,686,000
	Motion Picture Film Editing	\$ 628,000	\$ 628,000	\$ 628,000	\$ 628,000	\$ 628,000
	Motion Picture Film Laboratories	\$ 174,000	\$ 174,000	\$ 609,000	\$ 522,000	\$ 522,000
	Motion Picture Film Technicians	\$ 87,000	\$ 87,000	\$ 87,000	\$ 249,000	\$ 249,000
	Motion Picture Location Services	\$ 87,000	\$ 87,000	\$ 87,000	\$ 249,000	\$ 249,000
	Motion Picture Representatives	\$ -	\$ 1,036,000	\$ 1,036,000	\$ 1,440,000	\$ -
	Motion Picture Set Design and Costuming	\$ 41,500,000	\$ 34,502,000	\$ 33,266,000	\$ 48,233,000	\$ 48,233,000
	Motion Picture Special Effects	\$ 1,479,000	\$ 1,827,000	\$ 870,000	\$ 4,144,000	\$ 1,992,000
	Reproduction Services – Motion Pictures	\$ 11,563,000	\$ 8,677,000	\$ 6,568,000	\$ 25,291,000	\$ 22,407,000
	Video Post Production	\$ 348,000	\$ 174,000	\$ 174,000	\$ 174,000	\$ 678,000
Video Production Services	\$ 173,190,000	\$ 179,580,000	\$ 185,551,000	\$ 257,302,000	\$ 262,876,000	
East Central Total		\$ 999,053,000	\$ 892,461,000	\$ 749,702,000	\$ 891,008,000	\$ 613,229,000
Percentage Change			-10.7%	-16.0%	18.8%	-31.2%
North Central	Film Production Services	\$ 3,140,000	\$ 4,396,000	\$ 8,730,000	\$ 6,022,000	\$ 1,822,000
	Film Studio Production Facilities	\$ 314,000	\$ 314,000	\$ 314,000	\$ 942,000	\$ 2,198,000
	Lighting Film and Video	\$ 549,000	\$ 658,000	\$ -	\$ -	\$ -
	Reproduction Services – Motion Pictures	\$ 1,611,000	\$ 1,512,000	\$ 500,000	\$ 650,000	\$ 1,148,000
	Video Production Services	\$ 16,708,000	\$ 15,476,000	\$ 16,222,000	\$ 20,085,000	\$ 22,951,000
North Central Total		\$ 22,322,000	\$ 22,356,000	\$ 25,766,000	\$ 27,699,000	\$ 28,119,000
Percentage Change			0.2%	15.3%	7.5%	1.5%
Northeast	Advertising – Motion Picture	\$ 2,528,000	\$ 2,528,000	\$ 2,528,000	\$ 3,344,000	\$ 2,508,000
	Casting Directors	\$ 174,000	\$ 174,000	\$ 174,000	\$ -	\$ -
	Editing Services – Motion Picture Production	\$ 2,376,000	\$ 2,376,000	\$ 2,574,000	\$ 2,574,000	\$ 726,000
	Film Production Services	\$ 1,884,000	\$ 314,000	\$ 314,000	\$ -	\$ 1,256,000
	Film Studio Production Facilities	\$ 15,386,000	\$ 14,130,000	\$ 13,502,000	\$ 13,502,000	\$ 15,700,000
	Lighting Film and Video	\$ 13,612,000	\$ 5,922,000	\$ 16,902,000	\$ 3,052,000	\$ 3,052,000
	Motion Picture Equipment and Supplies	\$ 8,124,000	\$ 549,000	\$ 942,000	\$ 942,000	\$ -
	Motion Picture Film Distributors	\$ 5,705,000	\$ 5,705,000	\$ 5,705,000	\$ 2,345,000	\$ 2,345,000
	Motion Picture Location Services	\$ -	\$ 348,000	\$ 348,000	\$ 498,000	\$ 498,000
	Reproduction Services – Motion Pictures	\$ 2,567,000	\$ 3,520,000	\$ 3,868,000	\$ 6,636,000	\$ 5,310,000
Video Production Services	\$ 74,404,000	\$ 103,189,000	\$ 109,462,000	\$ 122,807,000	\$ 109,305,000	
Northeast Total		\$ 126,760,000	\$ 138,755,000	\$ 156,319,000	\$ 155,700,000	\$ 140,700,000
Percentage Change			9.5%	12.7%	-0.4%	-9.6%
Northwest	Advertising – Motion Picture	\$ 790,000	\$ 790,000	\$ 790,000	\$ 6,731,000	\$ 6,731,000
	Animated Film Services	\$ 628,000	\$ 628,000	\$ 628,000	\$ -	\$ -
	Film Production Services	\$ 1,570,000	\$ -	\$ 942,000	\$ -	\$ -
	Film Studio Production Facilities	\$ 2,198,000	\$ 2,198,000	\$ 2,198,000	\$ 2,512,000	\$ 3,140,000
	Lighting Film and Video	\$ 77,276,000	\$ 92,426,000	\$ 92,426,000	\$ 13,486,000	\$ 13,486,000
	Motion Picture Set Design and Costuming	\$ 1,752,000	\$ 1,752,000	\$ 1,752,000	\$ 2,640,000	\$ 2,640,000
	Reproduction Services – Motion Pictures	\$ 6,987,000	\$ 7,169,000	\$ 5,645,000	\$ 2,781,000	\$ 1,267,000
	Video Production Services	\$ 49,158,000	\$ 52,672,000	\$ 47,989,000	\$ 45,506,000	\$ 41,117,000
	Northwest Total		\$ 140,359,000	\$ 157,635,000	\$ 152,370,000	\$ 73,656,000
Percentage Change			12.3%	-3.3%	-51.7%	-7.2%

Revenues						
Region	Description	2003	2004	2005	2006	2007
South Central	Video Production Services	\$ 2,032,000	\$ 1,404,000	\$ 1,404,000	\$ 314,000	\$ 942,000
South Central Total		\$ 2,032,000	\$ 1,404,000	\$ 1,404,000	\$ 314,000	\$ 942,000
Southeast	Advertising – Motion Picture	\$ 5,785,000	\$ 6,162,000	\$ 6,919,000	\$ 20,197,000	\$ 14,720,000
	Animated Film Services	\$ 16,033,000	\$ 13,468,000	\$ 14,410,000	\$ 11,362,000	\$ 19,142,000
	Casting Directors	\$ 3,306,000	\$ 2,784,000	\$ 2,088,000	\$ 4,980,000	\$ 4,482,000
	Editing Services – Motion Picture Production	\$ 4,300,000	\$ 8,351,000	\$ 15,306,000	\$ 47,401,000	\$ 49,005,000
	Film Production Services	\$ 80,241,000	\$ 70,015,000	\$ 61,480,000	\$ 60,368,000	\$ 81,406,000
	Film Studio Production Facilities	\$ 186,057,000	\$ 144,861,000	\$ 192,657,000	\$ 246,608,000	\$ 228,549,000
	Lighting Film and Video	\$ 116,253,000	\$ 114,469,000	\$ 149,858,000	\$ 134,697,000	\$ 142,872,000
	Motion Picture Equipment	\$ 5,415,000	\$ 10,830,000	\$ 8,778,000	\$ 16,879,000	\$ 21,214,000
	Motion Picture Equipment and Supplies	\$ 118,432,000	\$ 121,222,000	\$ 108,338,000	\$ 172,972,000	\$ 159,424,000
	Motion Picture Film Distributors	\$ 14,833,000	\$ 14,833,000	\$ 21,679,000	\$ 9,380,000	\$ 19,229,000
	Motion Picture Film Editing	\$ 696,000	\$ 1,131,000	\$ 957,000	\$ 348,000	\$ 261,000
	Motion Picture Film Laboratories	\$ -	\$ -	\$ 1,566,000	\$ 1,566,000	\$ 1,566,000
	Motion Picture Film Libraries	\$ 504,000	\$ 504,000	\$ 504,000	\$ 1,876,000	\$ 1,876,000
	Motion Picture Film Scoring	\$ 87,000	\$ -	\$ -	\$ -	\$ -
	Motion Picture Film Technicians	\$ 348,000	\$ -	\$ -	\$ -	\$ -
	Motion Picture Location Services	\$ 5,262,000	\$ 3,915,000	\$ 6,915,000	\$ 8,964,000	\$ 18,177,000
	Motion Picture Representatives	\$ 348,000	\$ 348,000	\$ -	\$ -	\$ -
	Motion Picture Set Design and Costuming	\$ 1,752,000	\$ 3,066,000	\$ 4,476,000	\$ 8,976,000	\$ 8,976,000
	Motion Picture Sound Services	\$ 942,000	\$ 942,000	\$ 942,000	\$ 1,256,000	\$ 1,256,000
	Motion Picture Special Effects	\$ 1,044,000	\$ 1,218,000	\$ 1,218,000	\$ 498,000	\$ 249,000
	Motion Picture Stock Shots	\$ 1,884,000	\$ 1,884,000	\$ 1,884,000	\$ 1,884,000	\$ 3,140,000
	Reproduction Services – Motion Pictures	\$ 30,870,000	\$ 24,825,000	\$ 52,701,000	\$ 49,505,000	\$ 48,804,000
	Titling Service – Television and Motion Pictures	\$ 348,000	\$ 348,000	\$ -	\$ -	\$ -
	Video Post Production	\$ -	\$ -	\$ -	\$ -	\$ 1,392,000
	Video Production Services	\$ 375,273,000	\$ 356,229,000	\$ 351,201,000	\$ 324,538,000	\$ 418,170,000
Southeast Total		\$ 970,013,000	\$ 901,405,000	\$ 1,003,877,000	\$ 1,124,255,000	\$ 1,243,910,000
Percentage Change			-7.1%	11.4%	12.0%	10.6%
Southwest	Computer Animation	\$ -	\$ 174,000	\$ 174,000	\$ 726,000	\$ 726,000
	Film Production Services	\$ 1,256,000	\$ 1,570,000	\$ 2,512,000	\$ 3,140,000	\$ 4,082,000
	Lighting Film and Video	\$ 11,370,000	\$ 12,028,000	\$ 12,028,000	\$ 11,895,000	\$ 11,895,000
	Reproduction Services – Motion Pictures	\$ 2,572,000	\$ 3,959,000	\$ 462,000	\$ 498,000	\$ 1,341,000
	Television Films Producers	\$ -	\$ -	\$ -	\$ -	\$ 2,198,000
	Video Production Services	\$ 34,704,000	\$ 34,737,000	\$ 36,351,000	\$ 48,880,000	\$ 52,395,000
Southwest Total		\$ 49,902,000	\$ 52,468,000	\$ 51,527,000	\$ 65,139,000	\$ 72,637,000
Percentage Change			5.1%	-1.8%	26.4%	11.5%
Tampa Bay	Advertising – Motion Picture	\$ 2,212,000	\$ 2,686,000	\$ 1,896,000	\$ 10,702,000	\$ 8,403,000
	Animated Film Services	\$ 1,954,000	\$ 3,140,000	\$ 5,024,000	\$ 5,024,000	\$ 5,024,000
	Editing Services – Motion Picture Production	\$ 87,000	\$ 87,000	\$ 435,000	\$ 363,000	\$ 363,000
	Film Production Services	\$ 17,534,000	\$ 15,386,000	\$ 21,038,000	\$ 19,415,000	\$ 21,927,000
	Film Studio Production Facilities	\$ -	\$ -	\$ -	\$ -	\$ 628,000
	Lighting Film and Video	\$ 18,755,000	\$ 18,755,000	\$ 13,585,000	\$ 22,742,000	\$ 21,216,000
	Motion Picture Equipment and Supplies	\$ -	\$ -	\$ 1,316,000	\$ -	\$ -
	Motion Picture Film Delivery	\$ 1,410,000	\$ 2,115,000	\$ 1,410,000	\$ 2,325,000	\$ 2,280,000
	Motion Picture Representatives	\$ 87,000	\$ -	\$ -	\$ -	\$ -
	Motion Picture Set Design and Costuming	\$ 1,752,000	\$ -	\$ -	\$ -	\$ -
	Motion Picture Special Effects	\$ 174,000	\$ 609,000	\$ 435,000	\$ 1,245,000	\$ 1,245,000
	Reproduction Services – Motion Pictures	\$ 6,369,000	\$ 9,994,000	\$ 9,025,000	\$ 22,600,000	\$ 14,112,000
	Television Films Producers	\$ 3,768,000	\$ 2,826,000	\$ 2,826,000	\$ 1,256,000	\$ 3,140,000
	Video Post Production	\$ 348,000	\$ 348,000	\$ 3,568,000	\$ 41,621,000	\$ 34,008,000
	Video Production Services	\$ 161,338,000	\$ 161,301,000	\$ 153,964,000	\$ 25,032,000	\$ 28,084,000
Tampa Bay Total		\$ 215,788,000	\$ 217,247,000	\$ 214,522,000	\$ 152,325,000	\$ 140,430,000
Percentage Change			0.7%	-1.3%	-29.0%	-7.8%

Appendix E - Economic Model and Glossary

There are several types of models typically used to calculate economic impacts. Input-output models use financial flow data generated from businesses' accounting data, and spending patterns for households of particular income levels, to describe the economic linkages that exist within a regional economy. These models begin with US government-generated county level data on business purchases and receipts in order to model the inputs that are used from across the many sectors of the economy in the production of particular goods and services. The level of geographic and commodity detail can vary from production of printing ink, to storage batteries, to banking services in a geographic area as small as a zip code or as large as the national economy. The most commonly reported and useful level of detail is county-level geography at the 1 to 6 digit North American Industry Classification System (NAICS) level of commodity detail, whereas the previous 2003 report was conducted with the 1, 2, and 3 Standard Industrial Classification (SIC) code level of commodity detail. Examples of these models include the RIMSII modeling system from the US Department of Commerce and the IMPLAN modeling system from MIG, Inc. of St. Paul, MN.

Econometric simulation models combine the sector detail and geography detail of input/output models but provide for functioning economic linkages between sectors and regions over time. The current study uses REMI Policy Insight, Version 9.5 (Regional Economic Models Inc.), in a 67 region (one for each county) structural econometric model of the state of Florida to calculate the 2007 impact, while the impact study for 2003 employs REMI Policy Insight, Version 7.0. It incorporates the basic input/output linkages, but also uses econometrically estimated county-specific parameters, for example, interregional migration in response to changes in economic opportunities, in generating impact results. Because of these between-sector linkages, the model incorporates general equilibrium tendencies as the economy responds to shocks over time. That is, changes in spending in a region affect not just conditions in that market, but also in other markets within the region (economists term this a "general equilibrium") and outside the region (via trade and also via migration in response to changes in economic opportunities). This is in contrast to traditional input-output models that are both static (all effects are assumed to occur simultaneously, so there is no adjustment path over time) and partial equilibrium (e.g., changes in employment do not change wage rates) in nature. This describes the phenomenon whereby, for example, a new financial services back office call center opens in a county, and bank managers throughout the county find they have to give staff a raise in order to keep them from leaving to take a job at the new call center. A traditional input-output model description of the economic impact would have held everything else fixed (including bank wages across the county) and simply documented the employment and job creation effects resulting directly at the new call center and indirectly via businesses in its supply chain, as well as household spending induced by the new income flows.

A simulation model such as REMI captures not only the spending effects flowing from the call center and its local suppliers and employees and owners, but also the spillover effects into other markets as wages and prices change due to competition for the same employees and other resources. These are the general equilibrium (equilibrium across all markets simultaneously) tendencies of the model. It also simulates the adjustment path over time of these market responses, using historical parameters estimated specifically for that county (the dynamic component). A rule of thumb is that the smaller the spending change being considered, the more appropriate it is to use the traditional input/output model. However, the general equilibrium and dynamic characteristics of an economic simulation model are particularly important when considering "large" changes. The presence or absence of over 100,000 jobs in the Film and Entertainment Industry in Florida is a "large" change, because

employment of this magnitude is likely to have spillover impacts in other markets not directly in the film and entertainment related supply chain.

The approach used in this simulation study was to construct a regional baseline forecast extending for 2003 and 2007 for each of the 67 regions (Florida counties). These forecasts were developed based on US 2002 and 2006 macroeconomic data, with 2006 being the last full year of data adequate to run the REMI simulation. REMI model policy variables were then selected and an intervention constructed based on employment data from secondary sources. The model was then run with the employment interventions in place, in order to simulate a Florida economy with no film and entertainment employment occurring in Florida. The differences between the baseline forecast and the forecast with the interventions comprise the results or the causes associated with the given effects.

One other benefit of using an economic simulation model is particularly important when considering large spending flows. In an input-output model, impacts are usually measured as gross impacts, or additions to the area's economy without consideration of the extent to which, for example, a project's use of labor force may make labor more expensive to other businesses, or require additional infrastructure investment. The use of REMI attenuates this problem and so comes closer to an estimate of net, rather than gross, economic impacts because of the feedback effects present in this simulation model.

Glossary of REMI model terms

General Sales Tax and Selective Sales Tax - General Sales Tax includes taxes applicable with only specified exceptions (e.g., food and prescribed medicines) to sales of all types of goods and services or to all gross receipts, whether at a single rate or at classified rates, and sales use taxes. Taxes imposed distinctively on sales of or gross receipts from selected commodities, services, or businesses are reported as Selective Sales Tax.

Intergovernmental Revenue - Amounts received from local governments for use in performing specific functions, for general financial assistance, or as share of tax proceeds.

For state governments, Intergovernmental Revenue includes local government shares of state-administered programs requiring local financial participation; reimbursements from local governments for services provided to them by the state, such as auditing local accounts; monies from localities to pay debt service on state debt issued for the benefit of local governments; and repayments of contingent loans and advances previously extended to local governments.

For local governments, Intergovernmental Revenue includes financial support from other local governments for activities administered by the recipient locality, including its dependent agencies; state aid channeled through other local governments which have some discretion as to its distribution; reimbursements for services provided to other local governments (other than for utility services); and payments-in-lieu-of-taxes on other local governments' property.

For state governments, Intergovernmental Revenue excludes monies received from local governments and held in an agency capacity on their behalf (e.g., to repay interest and principal on local debt); receipt of state-imposed taxes or other state revenues collected by local governments acting as agents for the state; taxes on local government facilities (report last two exclusions at the appropriate Tax code); proceeds from the sale, liquidation, or earnings of local government securities held by the state (non-revenues except for earnings); proceeds from sale of buildings, property, or commodities (report at the appropriate Miscellaneous General Revenue code); charges for utility services to local governments (report at the appropriate Utility Revenue code); and contributions

from local governments for employee retirement or other insurance trust systems (report at the appropriate Insurance Trust code).

For local governments, Intergovernmental Revenue excludes state grants or shared taxes to be transmitted through government with no discretion as to their distribution (report at Intergovernmental Revenue from the State Government for the final recipient local government); receipt of taxes or other charges collected by another local government acting as the receiving government's agent (report at the appropriate Tax code); proceeds from the sale, liquidation, or earnings of local government securities held by other localities (non-revenues except for earnings); taxes on facilities of other local governments; proceeds from the sale of buildings, property, or commodities (report at the appropriate Miscellaneous General Revenue code); charges for utility services to other local governments (report at the appropriate Utility Revenue code); and payments-in-lieu-of-taxes from private organizations like private colleges.

Output - Output is the amount of production, including all intermediate goods purchased as well as value-added (compensation and profit). It can also be thought of as sales or supply. The components of Output are Self Supply and Exports (Multi-regions, Rest of Nation, and Rest of World).

Output is affected by changes in industry Demand in all regions in the nation, the home region's share of each market, and international exports from the region.

Value-Added – Value-Added is a measure of the contribution of each private industry and of government to a region's Gross Regional Product. It is defined as an industry's gross output (which consists of sales or receipts and other operating income, commodity taxes, and inventory change) minus its intermediate inputs (which consist of energy, raw materials, semi-finished goods, and services that are purchased from domestic industries or from foreign sources). Value-Added by industry can also be measured as the sum of compensation of employees, taxes on production and imports less subsidies, and gross operating surplus.

Gross Regional Product - Gross Regional Product as a Value-Added concept is analogous to the national concept of Gross Domestic Product. It is equal to output excluding the intermediate inputs, and represents compensation and profits. Gross Regional Product as a Final Demand concept is equal to Consumption + Investment + Government + (Exports - Imports).

Appendix F - Other Studies

City or State	Year	Impact	Industry Definition	Multiplier
Arizona	2004	\$201.5 million	NAICS 51211; 51219; 51212	1.82 employment
Colorado	2003	\$205.5 million	SIC 7812 and 7819	3.0 emp.; 3.1 wage
Florida	2007	\$29.3 billion	See this study	1.95 output
Georgia	2005-07	\$1.17 billion	Film, television, commercial, and video production	Unknown
Louisiana	2006	\$1.03 billion	NAICS 512; 516; 7115	1.847 output
New Mexico	2006	\$780 million	Unknown	Unknown
New York	2006	\$13.3 billion	Film, Television, and Commercial Production	3.1 employment
Oregon	2008	\$1.39 billion	Film and Video Production	1.96 output
Seattle, WA	2003	\$471 million	NAICS 51211; 51219; 541922	Used IMPLAN
South Carolina	2002	74.5 million	Film Industry	Unknown
Virginia	2005	\$510 million	NAICS 512110; 512210; 512191; 512199	Used IMPLAN
United States	2006	\$60.4 billion	All motion picture, television, and commercial production	Not provided

Note: Industry definitions are not comparable. Each state or analyst chooses how to define the industry and what industry classifications to include within the definition.

Sources:

Analysis of the Film and Video Industry in Arizona, December 2004, ESI Corporation

The Impact of the Film Industry in Colorado, June 2003, Business Research Division, Leeds School of Business, University of Colorado at Boulder

The Economic Impacts of Film & Video Productions in Seattle, September 2003, ECONorthwest

Trends in Film, Music, & Digital Media, December 2006, Economic Research Associates (Louisiana)

An Economic Analysis of Virginia's Film and Video Production-Distribution Industry, December 2005, Center for Public Policy at the L. Douglas Wilder School of Government and Public Affairs, Virginia Commonwealth University

An Economic Impact Analysis of the Oregon Film and Video Industry in 2007, July 2008, ECONorthwest

New York's Big Picture: Assessing New York's Position in Film, Television and Commercial Production, August 2006, Cornell University New York State School of Industrial and Labor Relations, New York City Department of City and Regional Planning, Ithaca; Fiscal Policy Institute, New York

The Economic Impact of the Motion Picture & Television Production Industry on the United States, 2006, Motion Picture Association of America

New release from the Office of the Governor, State of Georgia, dated May 12, 2008

Economic Impact of the Arts in South Carolina, data extracted from University of South Carolina, April 2002 study, www.sclatlanta.org/arts/web/South_Carolina.pdf

Appendix G - Florida Educational Programs 2006 Completions by Institution

Title	Institution	Award Level	2006 Completions
Music, Other	Full Sail Real World Education	Associate degree	1,315
Cinematography and Film/Video Production	Full Sail Real World Education	Associate degree	687
Mass Communication/Media Studies	Florida International University	Bachelor's degree	307
Mass Communication/Media Studies	University of South Florida	Bachelor's degree	242
Mass Communication/Media Studies	University of North Florida	Bachelor's degree	201
Public Relations/Image Management	University of Florida	Bachelor's degree	176
Mass Communication/Media Studies	The University of West Florida	Bachelor's degree	170
Journalism	University of Florida	Bachelor's degree	166
Radio and Television	University of Florida	Bachelor's degree	151
Communication Studies/Speech Communication and Rhetoric	Florida Atlantic University	Bachelor's degree	142
Mass Communication/Media Studies	University of Central Florida	Bachelor's degree	124
Intermedia/Multimedia	University of Central Florida	Bachelor's degree	111
Drama and Dramatics/Theatre Arts, General	Florida State University	Bachelor's degree	101
Communication Studies/Speech Communication and Rhetoric	The University of Tampa	Bachelor's degree	99
Radio and Television	University of Central Florida	Bachelor's degree	97
Cinematography and Film/Video Production	International Academy of Design and Technology	Associate degree	91
Commercial and Advertising Art	Valencia Community College	Award of less than 1 academic year	89
Cinematography and Film/Video Production	University of Miami	Bachelor's degree	81
Communication, Journalism, and Related Programs, Other	Flagler College	Bachelor's degree	79
Drama and Dramatics/Theatre Arts, General	University of Central Florida	Bachelor's degree	70
Creative Writing	University of Miami	Bachelor's degree	69
Cinematography and Film/Video Production	Valencia Community College	Award of less than 1 academic year	68
Commercial and Advertising Art	Southwest Florida College	Associate degree	62
Commercial and Advertising Art	The Art Institute of Fort Lauderdale Inc	Bachelor's degree	61
Mass Communication/Media Studies	University of Florida	Master's degree	61
Public Relations/Image Management	University of Miami	Bachelor's degree	58
Photographic and Film/Video Technology/Technician and Assistant	Daytona Beach Community College	Associate degree	55
Mass Communication/Media Studies	Lynn University	Bachelor's degree	54
Web Page, Digital/Multimedia and Information Resources Design	Florida Career College	Award of at least 1 but less than 2 academic years	54
Music, General	Florida State University	Bachelor's degree	53
Recording Arts Technology/Technician	Audio Recording Technology Institute	Award of less than 1 academic year	53
Public Relations/Image Management	Rollins College	Bachelor's degree	52
Mass Communication/Media Studies	Florida International University	Master's degree	48
Graphic Design	International Academy of Design and Technology	Bachelor's degree	45
Drama and Dramatics/Theatre Arts, General	University of Miami	Bachelor's degree	44

Title	Institution	Award Level	2006 Completions
Computer Graphics	South Florida Institute of Technology	Award of less than 1 academic year	42
Journalism	University of Miami	Bachelor's degree	42
Music, Other	University of Miami	Bachelor's degree	42
Cinematography and Film/Video Production	Valencia Community College	Associate degree	40
Drama and Dramatics/Theatre Arts, General	University of South Florida	Bachelor's degree	40
Graphic Design	Ringling School of Art and Design	Bachelor's degree	39
Music, General	University of Florida	Bachelor's degree	39
Graphic Design	International Academy of Design and Technology	Associate degree	38
Animation, Interactive Tech, Video Graphics and Special Effects	International Academy of Design and Technology	Bachelor's degree	38
Broadcast Journalism	University of Miami	Bachelor's degree	38
Journalism	Florida Agricultural and Mechanical University	Bachelor's degree	37
Public Relations/Image Management	Florida Agricultural and Mechanical University	Bachelor's degree	35
Web Page, Digital/Multimedia and Information Resources Design	High-Tech Institute-Orlando	Associate degree	34
Music Performance, General	Florida State University	Master's degree	33
Radio and Television Broadcasting Technology/Technician	City College	Associate degree	33
Mass Communication/Media Studies	University of Central Florida	Master's degree	33
Drama and Dramatics/Theatre Arts, General	Florida State University	Master's degree	33
Intermedia/Multimedia	Ai Miami International University of Art and Design	Bachelor's degree	33
Communication Studies/Speech Communication and Rhetoric	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	32
Commercial and Advertising Art	Valencia Community College	Associate degree	32
Graphic Design	Flagler College	Bachelor's degree	31
Music Performance, General	Florida State University	Bachelor's degree	31
Commercial and Advertising Art	The Art Institute of Fort Lauderdale Inc	Associate degree	30
Graphic Design	Ai Miami International University of Art and Design	Bachelor's degree	30
Cinematography and Film/Video Production	University of Central Florida	Bachelor's degree	30
Cinematography and Film/Video Production	Florida Metropolitan University-Melbourne	Associate degree	29
Drama and Dramatics/Theatre Arts, General	University of Florida	Bachelor's degree	29
Graphic Design	University of Florida	Bachelor's degree	28
Journalism	University of Central Florida	Bachelor's degree	28
Computer Graphics	International Academy of Design and Technology	Associate degree	27
Cinematography and Film/Video Production	Florida Metropolitan University-North Orlando	Associate degree	27
Cinematography and Film/Video Production	Broward Community College	Award of less than 1 academic year	26
Music, General	Florida Atlantic University	Bachelor's degree	26
Music, General	Rollins College	Bachelor's degree	26
Creative Writing	The University of Tampa	Bachelor's degree	25
Intermedia/Multimedia	University of Florida	Bachelor's degree	25

Title	Institution	Award Level	2006 Completions
Cinematography and Film/Video Production	Florida State University	Master's degree	24
Web Page, Digital/Multimedia and Information Resources Design	Florida Technical College	Associate degree	23
Communication Studies/Speech Communication and Rhetoric	Rollins College	Master's degree	23
Music, General	University of Florida	Master's degree	23
Music, Other	Valencia Community College	Associate degree	23
Cinematography and Film/Video Production	Miami Dade College	Associate degree	22
Industrial Design	The Art Institute of Fort Lauderdale Inc	Bachelor's degree	22
Cinematography and Film/Video Production	Florida State University	Bachelor's degree	22
Cinematography and Film/Video Production	The Art Institute of Fort Lauderdale Inc	Associate degree	22
Mass Communication/Media Studies	University of South Florida	Master's degree	21
Commercial and Advertising Art	Miami Dade College	Associate degree	21
Public Relations/Image Management	Florida Southern College	Bachelor's degree	21
Film/Cinema Studies	University of Miami	Bachelor's degree	21
Music, Other	Valencia Community College	Award of less than 1 academic year	21
Commercial and Advertising Art	Santa Fe Community College	Associate degree	20
Music Performance, General	University of South Florida	Master's degree	20
Music, Other	University of Miami	Master's degree	20
Web Page, Digital/Multimedia and Information Resources Design	Ridge Career Center	Award of at least 1 but less than 2 academic years	20
Drama and Dramatics/Theatre Arts, General	Florida International University	Bachelor's degree	20
Music, General	Florida International University	Bachelor's degree	20
Cinematography and Film/Video Production	Ai Miami International University of Art and Design	Bachelor's degree	19
Music Performance, General	University of South Florida	Bachelor's degree	19
Cinematography and Film/Video Production	Seminole Community College	Associate degree	19
Dance, General	University of Florida	Bachelor's degree	18
Drama and Dramatics/Theatre Arts, General	Rollins College	Bachelor's degree	18
Radio and Television Broadcasting Technology/Technician	The Art Institute of Fort Lauderdale Inc	Associate degree	18
Radio and Television	University of Miami	Bachelor's degree	18
Music, Other	Miami Dade College	Associate degree	18
Web Page, Digital/Multimedia and Information Resources Design	International Academy of Design and Technology	Associate degree	18
Creative Writing	Eckerd College	Bachelor's degree	18
Commercial and Advertising Art	Manatee Community College	Associate degree	18
Radio and Television Broadcasting Technology/Technician	McFatter Technical Center	Award of at least 1 but less than 2 academic years	17
Music, General	Florida International University	Master's degree	17
Music Performance, General	Florida State University	Doctoral degree	17
Cinematography and Film/Video Production	Full Sail Real World Education	Bachelor's degree	16
Commercial and Advertising Art	Indian River Community College	Associate degree	16
Drama and Dramatics/Theatre Arts, General	Florida Atlantic University	Bachelor's degree	16
Dance, General	Florida State University	Bachelor's degree	16
Dance, General	University of South Florida	Bachelor's degree	16
Drama and Dramatics/Theatre Arts, General	Flagler College	Bachelor's degree	16

Title	Institution	Award Level	2006 Completions
Commercial and Advertising Art	St Petersburg College	Associate degree	16
Jazz/Jazz Studies	University of Miami	Bachelor's degree	16
Music, Other	Stetson University	Bachelor's degree	16
Web Page, Digital/Multimedia and Information Resources Design	ITT Technical Institute-Fort Lauderdale	Associate degree	15
Mass Communication/Media Studies	Jacksonville University	Bachelor's degree	15
Creative Writing	University of Florida	Master's degree	15
Commercial and Advertising Art	Lynn University	Bachelor's degree	14
Cinematography and Film/Video Production	The Art Institute of Fort Lauderdale Inc	Bachelor's degree	14
Commercial and Advertising Art	Pensacola Junior College	Associate degree	14
Web Page, Digital/Multimedia and Information Resources Design	Winter Park Tech	Award of at least 1 but less than 2 academic years	14
Intermedia/Multimedia	International Academy of Design and Technology	Bachelor's degree	14
Graphic Design	Florida Agricultural and Mechanical University	Bachelor's degree	14
Dance, General	Florida International University	Bachelor's degree	14
Mass Communication/Media Studies	University of Miami	Bachelor's degree	13
Web Page, Digital/Multimedia and Information Resources Design	Florida National College	Associate degree	13
Computer Graphics	International Academy of Design and Technology	Bachelor's degree	13
Cinematography and Film/Video Production	Brevard Community College	Award of less than 1 academic year	13
Radio and Television	Barry University	Bachelor's degree	13
Graphic Design	The University of Tampa	Bachelor's degree	13
Drama and Dramatics/Theatre Arts, General	Florida Agricultural and Mechanical University	Bachelor's degree	13
Public Relations/Image Management	University of Miami	Master's degree	13
Creative Writing	Florida International University	Master's degree	13
Radio and Television Broadcasting Technology/Technician	Orlando Tech	Award of at least 1 but less than 2 academic years	13
Dramatic/Theatre Arts and Stagecraft, Other	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	13
Music Performance, General	University of Miami	Master's degree	13
Commercial and Advertising Art	Broward Community College	Associate degree	13
Commercial and Advertising Art	The Art Institute of Fort Lauderdale Inc	Award of at least 1 but less than 2 academic years	12
Commercial and Advertising Art	Florida Community College at Jacksonville	Award of less than 1 academic year	12
Acting	University of Miami	Bachelor's degree	12
Music Management and Merchandising	Florida Southern College	Bachelor's degree	12
Commercial and Advertising Art	Brevard Community College	Award of less than 1 academic year	12
Journalism	Southeastern University	Bachelor's degree	12
Drama and Dramatics/Theatre Arts, General	Eckerd College	Bachelor's degree	12
Radio and Television Broadcasting Technology/Technician	Miami Dade College	Associate degree	12

Title	Institution	Award Level	2006 Completions
Communication Studies/Speech Communication and Rhetoric	Stetson University	Bachelor's degree	12
Music Performance, General	The University of West Florida	Bachelor's degree	12
Communication Studies/Speech Communication and Rhetoric	Southeastern University	Bachelor's degree	12
Drama and Dramatics/Theatre Arts, General	University of Florida	Master's degree	11
Commercial and Advertising Art	Broward Community College	Award of less than 1 academic year	11
Communication Studies/Speech Communication and Rhetoric	Embry Riddle Aeronautical University-Daytona Beach	Bachelor's degree	11
Cinematography and Film/Video Production	Ai Miami International University of Art and Design	Master's degree	11
Commercial and Advertising Art	Florida Metropolitan University-North Orlando	Associate degree	11
Cinematography and Film/Video Production	University of Miami	Master's degree	11
Radio and Television	University of Miami	Master's degree	11
Broadcast Journalism	Southeastern University	Bachelor's degree	11
Jazz/Jazz Studies	University of North Florida	Bachelor's degree	11
Intermedia/Multimedia	International Academy of Design and Technology	Associate degree	11
Cinematography and Film/Video Production	Daytona Beach Community College	Associate degree	11
Communication Studies/Speech Communication and Rhetoric	Warner Southern College	Bachelor's degree	10
Music, General	Florida Southern College	Bachelor's degree	10
Communication Studies/Speech Communication and Rhetoric	University of Miami	Bachelor's degree	10
Creative Writing	Florida Atlantic University	Master's degree	10
Graphic Design	University of Miami	Bachelor's degree	10
Journalism	Florida Agricultural and Mechanical University	Master's degree	10
Graphic Design	Ai Miami International University of Art and Design	Master's degree	10
Mass Communication/Media Studies	University of Florida	Doctoral degree	10
Music, General	University of Miami	Bachelor's degree	10
Music Performance, General	Bethune Cookman College	Bachelor's degree	9
Dance, General	Florida State University	Master's degree	9
Commercial and Advertising Art	Daytona Beach Community College	Associate degree	9
Drama and Dramatics/Theatre Arts, General	University of Central Florida	Master's degree	9
Music Performance, General	University of Central Florida	Bachelor's degree	9
Communication, Journalism, and Related Programs, Other	Brevard Community College	Award of less than 1 academic year	9
Web Page, Digital/Multimedia and Information Resources Design	Florida Metropolitan University-North Orlando	Associate degree	8
Music, General	University of North Florida	Bachelor's degree	8
Photographic and Film/Video Technology/Technician and Assistant	Pensacola Junior College	Associate degree	8
Journalism	University of Miami	Master's degree	8
Web Page, Digital/Multimedia and Information Resources Design	Stetson University	Bachelor's degree	8

Title	Institution	Award Level	2006 Completions
Music Theory and Composition	Florida State University	Master's degree	8
Commercial and Advertising Art	Brevard Community College	Associate degree	8
Design and Visual Communications, General	Miami Ad School	Award of at least 2 but less than 4 academic years	8
Dance, General	Jacksonville University	Bachelor's degree	8
Commercial and Advertising Art	Tallahassee Community College	Associate degree	8
Commercial and Advertising Art	First Coast Technical Institute	Award of at least 1 but less than 2 academic years	8
Music, General	The University of Tampa	Bachelor's degree	8
Painting	Ai Miami International University of Art and Design	Bachelor's degree	8
Cinematography and Film/Video Production	St Petersburg College	Award of less than 1 academic year	8
Radio and Television Broadcasting Technology/Technician	Miami Lakes Educational Center	Award of at least 1 but less than 2 academic years	7
Drama and Dramatics/Theatre Arts, General	Jacksonville University	Bachelor's degree	7
Music, General	Florida Atlantic University	Master's degree	7
Commercial and Advertising Art	Palm Beach Community College	Associate degree	7
Music Performance, General	University of Miami	Doctoral degree	7
Web Page, Digital/Multimedia and Information Resources Design	Lively Technical Center	Award of at least 1 but less than 2 academic years	7
Cinematography and Film/Video Production	Florida Community College at Jacksonville	Award of less than 1 academic year	7
Music Theory and Composition	University of Miami	Bachelor's degree	7
Music, Other	Florida Memorial University	Bachelor's degree	7
Computer Graphics	The University of Tampa	Bachelor's degree	7
Web Page, Digital/Multimedia and Information Resources Design	Manatee Technical Institute	Award of at least 1 but less than 2 academic years	6
Cinematography and Film/Video Production	Pensacola Junior College	Associate degree	6
Communication, Journalism, and Related Programs, Other	Daytona Beach Community College	Award of at least 1 but less than 2 academic years	6
Music, Other	Florida State University	Master's degree	6
Commercial and Advertising Art	Okaloosa-Walton College	Associate degree	6
Mass Communication/Media Studies	Barry University	Master's degree	6
Religious/Sacred Music	The Baptist College of Florida	Bachelor's degree	6
Music Performance, General	Lynn University	Bachelor's degree	6
Cinematography and Film/Video Production	Palm Beach Community College	Associate degree	6
Commercial and Advertising Art	Florida Metropolitan University-Tampa	Associate degree	6
Dance, General	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	6
Film/Cinema Studies	The University of Tampa	Bachelor's degree	6
Web Page, Digital/Multimedia and Information Resources Design	International Academy of Design and Technology	Bachelor's degree	6
Music, Other	Southeastern University	Bachelor's degree	6
Cinematography and Film/Video Production	Florida Community College at Jacksonville	Associate degree	6

Title	Institution	Award Level	2006 Completions
Music Performance, General	Lynn University	Post-master's certificate	6
Animation, Interactive Tech, Video Graphics and Special Effects	The Art Institute of Fort Lauderdale Inc	Bachelor's degree	6
Music Theory and Composition	Stetson University	Bachelor's degree	6
Cinematography and Film/Video Production	Broward Community College	Associate degree	6
Drama and Dramatics/Theatre Arts, General	Stetson University	Bachelor's degree	5
Design and Visual Communications, General	Tom P Haney Technical Center	Award of at least 1 but less than 2 academic years	5
Web Page, Digital/Multimedia and Information Resources Design	Atlantic Technical Center	Award of less than 1 academic year	5
Graphic Design	Florida State University	Bachelor's degree	5
Web Page, Digital/Multimedia and Information Resources Design	ITT Technical Institute-Miami	Associate degree	5
Design and Visual Communications, General	University of Miami	Bachelor's degree	5
Intermedia/Multimedia	Ai Miami International University of Art and Design	Master's degree	5
Music, General	Barry University	Bachelor's degree	5
Photographic and Film/Video Technology/Technician and Assistant	Miami Dade College	Associate degree	5
Jazz/Jazz Studies	University of Miami	Master's degree	5
Cinematography and Film/Video Production	Okaloosa-Walton College	Award of less than 1 academic year	5
Creative Writing	University of Miami	Master's degree	5
Piano and Organ	University of Miami	Bachelor's degree	5
Film/Cinema Studies	University of Miami	Master's degree	5
Music Performance, General	Florida Agricultural and Mechanical University	Bachelor's degree	5
Commercial and Advertising Art	Saint Johns River Community College	Associate degree	5
Music, Other	Okaloosa-Walton College	Associate degree	5
Commercial and Advertising Art	Lake City Community College	Award of less than 1 academic year	5
Voice and Opera	University of Miami	Bachelor's degree	5
Commercial and Advertising Art	St Petersburg College	Award of less than 1 academic year	5
Commercial and Advertising Art	Florida Community College at Jacksonville	Associate degree	5
Music, General	Florida College	Bachelor's degree	5
Commercial and Advertising Art	Westside Tech	Award of at least 1 but less than 2 academic years	4
Mass Communication/Media Studies	The University of West Florida	Master's degree	4
Cinematography and Film/Video Production	Brevard Community College	Associate degree	4
Communication Studies/Speech Communication and Rhetoric	Barry University	Bachelor's degree	4
Music Performance, General	Stetson University	Bachelor's degree	4
Communication Studies/Speech Communication and Rhetoric	University of Miami	Master's degree	4

Title	Institution	Award Level	2006 Completions
Radio and Television	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	4
Music Pedagogy	University of Miami	Master's degree	4
Web Page, Digital/Multimedia and Information Resources Design	Lee County High Tech Center Central	Award of at least 1 but less than 2 academic years	4
Music, General	University of Florida	Doctoral degree	4
Music, General	Southeastern University	Bachelor's degree	4
Communication Studies/Speech Communication and Rhetoric	Florida Institute of Technology	Bachelor's degree	4
Commercial and Advertising Art	Sarasota County Technical Institute	Award of at least 1 but less than 2 academic years	4
Journalism	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	4
Cinematography and Film/Video Production	Okaloosa-Walton College	Associate degree	4
Music, General	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	4
Commercial and Advertising Art	Pinellas Technical Education Center-Clearwater	Award of at least 1 but less than 2 academic years	4
Music Theory and Composition	Florida State University	Doctoral degree	4
Commercial and Advertising Art	Florida Southern College	Bachelor's degree	4
Commercial and Advertising Art	Lee County High Tech Center North	Award of at least 1 but less than 2 academic years	4
Music Performance, General	University of Miami	Bachelor's degree	4
Radio and Television	Lively Technical Center	Award of at least 1 but less than 2 academic years	4
Cinematography and Film/Video Production	Palm Beach Community College	Award of less than 1 academic year	4
Drama and Dramatics/Theatre Arts, General	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	4
Public Relations/Image Management	Barry University	Bachelor's degree	3
Music, General	Clearwater Christian College	Bachelor's degree	3
Music Performance, General	Jacksonville University	Bachelor's degree	3
Jazz/Jazz Studies	University of Miami	Doctoral degree	3
Animation, Interactive Tech, Video Graphics and Special Effects	International Academy of Design and Technology	Associate degree	3
Drama and Dramatics/Theatre Arts, General	The University of West Florida	Bachelor's degree	3
Web Page, Digital/Multimedia and Information Resources Design	ITT Technical Institute-Lake Mary	Associate degree	3
Music Theory and Composition	University of Miami	Doctoral degree	3
Conducting	University of Miami	Doctoral degree	3
Communication Studies/Speech Communication and Rhetoric	Nova Southeastern University	Bachelor's degree	3
Graphic Design	College of Business and Technology	Associate degree	3
Cinematography and Film/Video Production	Gulf Coast Community College	Associate degree	3
Commercial and Advertising Art	Lake-Sumter Community College	Associate degree	3

Title	Institution	Award Level	2006 Completions
Voice and Opera	Florida State University	Master's degree	3
Music Theory and Composition	University of Miami	Master's degree	3
Music Performance, General	University of North Florida	Bachelor's degree	3
Music, General	Jacksonville University	Bachelor's degree	3
Creative Writing	University of Central Florida	Master's degree	3
Drama and Dramatics/Theatre Arts, General	Florida Atlantic University	Master's degree	3
Piano and Organ	University of Miami	Doctoral degree	3
Music Management and Merchandising	Jacksonville University	Bachelor's degree	3
Conducting	University of Miami	Master's degree	2
Dramatic/Theatre Arts and Stagecraft, Other	University of Miami	Bachelor's degree	2
Drama and Dramatics/Theatre Arts, General	Florida Southern College	Bachelor's degree	2
Design and Visual Communications, General	Tom P Haney Technical Center	Award of less than 1 academic year	2
Violin, Viola, Guitar and Other Stringed Instruments	Stetson University	Bachelor's degree	2
Web Page, Digital/Multimedia and Information Resources Design	Sheridan Technical Center	Award of at least 1 but less than 2 academic years	2
Web Page, Digital/Multimedia and Information Resources Design	College of Business and Technology	Award of at least 1 but less than 2 academic years	2
Cinematography and Film/Video Production	St Petersburg College	Associate degree	2
Piano and Organ	University of Miami	Master's degree	2
Radio and Television Broadcasting Technology/Technician	Hillsborough Community College	Associate degree	2
Communication Studies/Speech Communication and Rhetoric	University of Miami	Doctoral degree	2
Creative Writing	Saint Leo University	Bachelor's degree	2
Cinematography and Film/Video Production	Hillsborough Community College	Associate degree	2
Piano and Organ	Stetson University	Bachelor's degree	2
Communication Studies/Speech Communication and Rhetoric	Edward Waters College	Bachelor's degree	2
Graphic Design	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	2
Commercial and Advertising Art	Lake City Community College	Associate degree	2
Music Theory and Composition	Florida Southern College	Bachelor's degree	2
Cinematography and Film/Video Production	Polk Community College	Associate degree	2
Computer Graphics	Miami-Dade County Public Schools-The English Center	Award of at least 1 but less than 2 academic years	2
Computer Graphics	University of Miami	Bachelor's degree	2
Drama and Dramatics/Theatre Arts, General	Barry University	Bachelor's degree	2
Religious/Sacred Music	Florida Southern College	Bachelor's degree	2
Radio and Television Broadcasting Technology/Technician	Pinellas Technical Education Center	Award of at least 1 but less than 2 academic years	2
Commercial and Advertising Art	Okaloosa-Walton College	Award of less than 1 academic year	2
Web Page, Digital/Multimedia and Information Resources Design	International Academy of Design and Technology	Bachelor's degree	2
Music Performance, General	The University of Tampa	Bachelor's degree	2

Title	Institution	Award Level	2006 Completions
Religious/Sacred Music	Warner Southern College	Bachelor's degree	2
Cinematography and Film/Video Production	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	1
Jazz/Jazz Studies	Florida Memorial University	Bachelor's degree	1
Voice and Opera	Stetson University	Bachelor's degree	1
Voice and Opera	University of Miami	Doctoral degree	1
Voice and Opera	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	1
Jazz/Jazz Studies	Florida Agricultural and Mechanical University	Bachelor's degree	1
Radio and Television Broadcasting Technology/Technician	Brevard Community College	Associate degree	1
Cinematography and Film/Video Production	Manatee Community College	Associate degree	1
Web Page, Digital/Multimedia and Information Resources Design	Technical Education Center-Osceola	Award of at least 1 but less than 2 academic years	1
Cinematography and Film/Video Production	Hillsborough Community College	Award of less than 1 academic year	1
Design and Visual Communications, General	George Stone Career Center	Award of at least 1 but less than 2 academic years	1
Religious/Sacred Music	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	1
Acting	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	1
Creative Writing	Florida State University	Master's degree	1
Communication Studies/Speech Communication and Rhetoric	Clearwater Christian College	Bachelor's degree	1
Drama and Dramatics/Theatre Arts, General	Southeastern University	Bachelor's degree	1
Business/Corporate Communications	Barry University	Master's degree	1
Commercial and Advertising Art	Palm Beach Community College	Award of at least 1 but less than 2 academic years	1
Music Performance, General	Palm Beach Atlantic University-West Palm Beach	Bachelor's degree	1
Commercial and Advertising Art	Lively Technical Center	Award of at least 1 but less than 2 academic years	1
Commercial and Advertising Art	Lake Technical Center	Award of at least 1 but less than 2 academic years	1
Drama and Dramatics/Theatre Arts, General	Florida State University	Doctoral degree	1
Commercial and Advertising Art	Florida Keys Community College	Associate degree	1
Film/Cinema Studies	Eckerd College	Bachelor's degree	1
Web Page, Digital/Multimedia and Information Resources Design	George Stone Career Center	Award of at least 1 but less than 2 academic years	1
Music, General	The University of Tampa	Associate degree	1
Cinematography and Film/Video Production	Florida Keys Community College	Associate degree	1
Animation, Interactive Tech, Video Graphics and Special Effects	ITT Technical Institute-Lake Mary	Bachelor's degree	1

Title	Institution	Award Level	2006 Completions
Radio and Television Broadcasting Technology/Technician	Miami Dade College	Award of at least 1 but less than 2 academic years	1
Cinematography and Film/Video Production	Tallahassee Community College	Associate degree	1
Web Page, Digital/Multimedia and Information Resources Design	Herzing College	Associate degree	1
Music, Other	Florida State University	Doctoral degree	1
Music Theory and Composition	Jacksonville University	Bachelor's degree	1
Painting	University of Miami	Bachelor's degree	1
Music, General	University of South Florida	Doctoral degree	1
Intermedia/Multimedia	University of Florida	Master's degree	1
Music, Other	Jacksonville University	Bachelor's degree	0
Journalism	Warner Southern College	Bachelor's degree	0
Music, Other	Okaloosa-Walton College	Award of less than 1 academic year	0
Religious/Sacred Music	Florida Memorial University	Bachelor's degree	0
Voice and Opera	University of Miami	Master's degree	0
Commercial and Advertising Art	Miami Dade College	Award of at least 1 but less than 2 academic years	0
Music Performance, General	Southeastern University	Bachelor's degree	0
Commercial and Advertising Art	Palm Beach Community College	Award of less than 1 academic year	0
Commercial and Advertising Art	Lindsey Hopkins Technical Education Center	Award of at least 1 but less than 2 academic years	0
Religious/Sacred Music	Clearwater Christian College	Bachelor's degree	0
Web Page, Digital/Multimedia and Information Resources Design	Radford M Locklin Technical Center	Award of at least 1 but less than 2 academic years	0
Web Page, Digital/Multimedia and Information Resources Design	Robert Morgan Educational Center	Award of at least 1 but less than 2 academic years	0
Computer Graphics	Webster College	Associate degree	0
Commercial and Advertising Art	Santa Fe Community College	Award of less than 1 academic year	0
Commercial and Advertising Art	Seminole Community College	Associate degree	0
Music, General	Eckerd College	Bachelor's degree	0
Music, General	Ave Maria University	Bachelor's degree	0
Theatre/Theatre Arts Management	University of Miami	Bachelor's degree	0
Music, General	Edward Waters College	Bachelor's degree	0
Graphic Design	Robert Morgan Educational Center	Award of at least 1 but less than 2 academic years	0
Commercial and Advertising Art	Seminole Community College	Award of less than 1 academic year	0
Graphic Design	College of Business and Technology-Flagler Campus	Associate degree	0
Graphic Design	College of Business and Technology-Hialeah Campus	Associate degree	0

Title	Institution	Award Level	2006 Completions
Graphic Design	Miami Lakes Educational Center	Award of at least 1 but less than 2 academic years	0
Web Page, Digital/Multimedia and Information Resources Design	Miami-Dade County Public Schools-The English Center	Award of at least 1 but less than 2 academic years	0
Web Page, Digital/Multimedia and Information Resources Design	Lindsey Hopkins Technical Education Center	Award of at least 1 but less than 2 academic years	0
Photographic and Film/Video Technology/Technician and Assistant	Daytona Beach Community College	Award of less than 1 academic year	0
Radio and Television Broadcasting Technology/Technician	Gulf Coast Community College	Associate degree	0
Radio and Television Broadcasting Technology/Technician	Manatee Technical Institute	Award of at least 1 but less than 2 academic years	0
Communications Technology/Technician	Sheridan Technical Center	Award of at least 1 but less than 2 academic years	0
Communication, Journalism, and Related Programs, Other	Seminole Community College	Award of less than 1 academic year	0
Voice and Opera	Southeastern University	Bachelor's degree	0
Public Relations/Image Management	Rollins College	Associate degree	0
Communication, Journalism, and Related Programs, Other	Palm Beach Community College	Award of less than 1 academic year	0
Communication, Journalism, and Related Programs, Other	Rollins College	Bachelor's degree	0
Piano and Organ	Southeastern University	Bachelor's degree	0
Radio and Television Broadcasting Technology/Technician	Miami Dade College	Award of less than 1 academic year	0
Web Page, Digital/Multimedia and Information Resources Design	ITT Technical Institute-Jacksonville	Associate degree	0
Web Page, Digital/Multimedia and Information Resources Design	ITT Technical Institute-Tampa	Associate degree	0
Web Page, Digital/Multimedia and Information Resources Design	Lee County High Tech Center North	Award of less than 1 academic year	0
Web Page, Digital/Multimedia and Information Resources Design	Florida National College	Award of less than 1 academic year	0
Web Page, Digital/Multimedia and Information Resources Design	College of Business and Technology-Hialeah Campus	Award of at least 1 but less than 2 academic years	0
Radio and Television Broadcasting Technology/Technician	Miami Lakes Educational Center	Award of less than 1 academic year	0
Animation, Interactive Tech, Video Graphics and Special Effects	ITT Technical Institute-Fort Lauderdale	Bachelor's degree	0
Animation, Interactive Tech, Video Graphics and Special Effects	ITT Technical Institute-Tampa	Bachelor's degree	0
Web Page, Digital/Multimedia and Information Resources Design	College of Business and Technology-Flagler Campus	Award of at least 1 but less than 2 academic years	0

Appendix H – Workforce Survey Instrument

Film Industry Survey Instrument

Hello, my name is _____ and I'm calling on behalf of the Executive Office of the Governor, Office of Film and Entertainment (from Oppenheim Research).

May I speak to &&?

IF CONNECTED, CONTINUE WITH INTRODUCTION

IF THE PERSON IS UNAVAILABLE, SCHEDULE A CB

IF THE PERSON IS NO LONGER AT THAT NUMBER, ASK IF THEY HAVE A NEW NUMBER FOR THAT PERSON.

IF NO NUMBER IS AVAILABLE, MARK AS A FINAL WRONG #

We obtained your number from the Film Florida Production Guide and would like your participation in a research study regarding the film industry. The study will take a few moments of your time and all responses will be kept confidential.

Questionnaire # _____ (1-4)

Q.1 To begin, How would you classify your employment status?

[REQUIRE ANSWER]

- (5)
- Owner 1
 - Full time with a single company 2
 - Part-time with a single company 3
 - Part-time with multiple companies 4
 - Freelance 5
 - Independent 6
 - DK 7

[S - IF THE ANSWER IS NOT 5 OR 6, THEN SKIP TO QUESTION 4]

Q.2 Do you currently operate out of the state of Florida?

[REQUIRE ANSWER]

- (6)
- Yes 1
 - No 2

Q.3 What percentage of your total business is generated in the state of Florida?

[REQUIRE ANSWER] _____ (7-16)

[A - IF THE ANSWER TO QUESTION 1 IS 5 OR 6, THEN SKIP TO QUESTION 7]

Q.4 Are you currently employed by a company that is headquartered in the state of Florida?

[REQUIRE ANSWER]

- (17)
- Yes (go to Q6) 1
 - No 2
 - DK 3

[S - IF THE ANSWER IS 1, THEN SKIP TO QUESTION 6]

Q.5 Where is your company headquartered? (CITY, STATE)

[REQUIRE ANSWER] _____ (18-317)

Q.6 Are you working for a Florida branch of that company?

[REQUIRE ANSWER]

(318)
Yes 1
No 2
DK 3

Q.7 Are you a member of a union?

[REQUIRE ANSWER]

(319)
Yes 1
No 2
DK 3

Q.8 Has your company sent you outside the state of Florida for work in the past year?

OR

IF FREELANCE/INDEPENDENT: Have you worked outside of Florida in the past year?

[REQUIRE ANSWER]

(320)
Yes 1
No (go to Q10) 2
DK 3

[S - IF THE ANSWER IS NOT 1, THEN SKIP TO QUESTION 10]

Q.9 Approximately how much time have you spent working out-of-state in the past year?

[REQUIRE ANSWER]

(321)
Less than one month 1
1 month 2
2 months 3
3 months 4
4-6 months 5
7-9 months 6
over 9 months 7
None 8
DK 9

Q.10 Approximately how long have you been with your current employer?
OR

How long have you been freelancing/independent?

[REQUIRE ANSWER]_____ (322-341)

Q.11 Approximately how many years have you been employed in the film and entertainment industry?

[REQUIRE ANSWER]_____ (342-351)

Q.12 Did you begin your career in the film and entertainment industry in Florida?

[REQUIRE ANSWER]

(352)

Yes (skip to Q15) 1

No 2

DK 3

[S - IF THE ANSWER IS NOT 2, THEN SKIP TO QUESTION 15]

Q.13 Where did you begin your film/entertainment career? (CITY, STATE)

[REQUIRE ANSWER]_____ (353-852)

Q.14 Why did you start there?

[REQUIRE ANSWER]_____ (853-1152)

Q.15 What is your current education level?

[REQUIRE ANSWER]

(1153)

Some high school 1

High school diploma 2

Some College 3

Trade/Technical School 4

Associates Degree 5

Bachelors Degree 6

Masters Degree 7

Doctorate 8

DK 9

Q.16 Do you have industry-level certifications or a degree relevant to your employment in the film and entertainment industry?

[REQUIRE ANSWER]

(1154)

Yes 1

No (go to Q18) 2

DK 3

[S - IF THE ANSWER IS NOT 1, THEN SKIP TO QUESTION 18]

Q.17 What are those certifications or degrees?
[REQUIRE ANSWER]_____ (1155-1354)

Q.18 Are you currently seeking to upgrade your film and entertainment industry skills?
[REQUIRE ANSWER] _____ (1355)
Yes 1
No (go to Q22) 2
DK 3

[S - IF THE ANSWER IS NOT 1, THEN SKIP TO QUESTION 22]

Q.19 What skill upgrades are you seeking?
[REQUIRE ANSWER]_____ (1356-1855)

Q.20 Will you be seeking this training in the state of Florida
[REQUIRE ANSWER] _____ (1856)
Yes (go to Q22) 1
No 2
DK 3

[S - IF THE ANSWER IS NOT 2, THEN SKIP TO QUESTION 22]

Q.21 Why are you choosing to leave Florida for your training?
[REQUIRE ANSWER]_____ (1857-2356)

Q.22 How do you think Florida compares to other states in terms of your ability to find and maintain employment in the film and entertainment industry? Would you say
_____ (2357)
Very Difficult 1
Somewhat Difficult 2
Average 3
Easy 4
Extremely Easy 5
DK 6

Q.23 Why do you feel that way?
_____ (2358-2857)

Q.24 Do you agree or disagree with the following statements:

- AGREE=1
- DISAGREE=2
- DK=3

1. I find it difficult to find and maintain employment in the film and entertainment industry in Florida when compared to other states.
2. Other states have greater job availability in the industry.
3. I find Florida to be average in regard to finding and maintaining employment in the film and entertainment industry.
4. I find it easy to find and maintain employment in the film and entertainment industry in Florida, but there are states with more opportunities.
5. I find it extremely easy to find and maintain employment in the film and entertainment industry in Florida

[REQUIRE ANSWER]

	Agree	Disagree	DK
I find it difficult to find and maintain employment in the film and entertainment industry in Florida when compared to other states.	1	2	3 (2858)
Other states have greater job availability in the industry.	1	2	3 (2859)
I find Florida to be average in regard to finding and maintaining employment in the film and entertainment industry.	1	2	3 (2860)
I find it easy to find and maintain employment in the film and entertainment industry in Florida, but there are states with more opportunities.	1	2	3 (2861)
I find it extremely easy to find and maintain employment in the film and entertainment industry in Florida.	1	2	3 (2862)

Q.25 What do you feel the state of Florida could do to improve your ability to find and maintain employment in the film and entertainment industry?

_____ (2863-3362)

Q.26 How important do you feel it is to:
 VERY IMPORTANT=1
 SOMEWHAT IMPORTANT=2
 NOT VERY IMPORTANT=3
 NOT IMPORTANT AT ALL=4
 DK=5

1. Provide tax incentives for businesses willing to relocate to Florida
2. Provide start up assistance for new and emerging companies
3. Provide financial assistance for those seeking training in the industry
4. Provide subsidies for Florida colleges and universities to increase the number of training programs related to the film and entertainment industry

[REQUIRE ANSWER]

	Very Important	Somewhat Important	Not Very Important	Not Important at all	DK
Provide tax incentives for businesses willing to relocate to Florida	1	2	3	4	5 (3363)
Provide start up assistance for new and emerging companies	1	2	3	4	5 (3364)
Provide financial assistance for those seeking training in the industry	1	2	3	4	5 (3365)
Provide subsidies for Florida colleges and universities to increase the number of training programs related to the film and entertainment industry.	1	2	3	4	5 (3366)

Q.27 What is your age?

- (3367)
- Under 18 1
 - 18-24 2
 - 25-34 3
 - 35-44 4
 - 45-54 5
 - 55-64 6
 - 65-74 7
 - Over 75 8
 - Refused 9

Q.28 What is your race?

- (3368)
- Caucasian 1
 - African American 2
 - Hispanic 3
 - Asian 4
 - Other 5

Q.29 DO NOT ASK! Gender

(3369)
Male 1
Female 2

Q.30 Thank you for taking the time to complete our study. Have a nice day.

INTERVIEWER ID # (2 DIGITS) _____ (3370-3371)

Q.31 Telephone Number _____ (5000-5015)

Q.32 Reference Number _____ (5016-5020)

Q.33 Name _____ (5021-5070)

Q.34 Sample _____ (5071)

[A - IF THE ANSWER TO QUESTION 4 IS NOT 999, THEN SKIP TO QUESTION 101]

Q.35 Sample Recode [REQUIRE ANSWER]

(5071)
South 1
West 2
Central 3
North 4

Q.36 Frequency in Sample _____ (5072-5081)

Q.37 Interviewer _____ (5082-5085)

Q.38 Date _____ (5086-5094)

Q.39 Call Result _____ (5095-5096)

Appendix I – Local Film Liaison Data

Number of Production Leads Received Film Office	Fiscal Year					
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Miami (Miami-Dade)	N/A	N/A	N/A	93	237	275
Daytona Beach (Volusia)	N/A	N/A	N/A	N/A	N/A	N/A
St. Petersburg, Clearwater (Pinellas)	548	511	460	566	768	492
Pensacola (Escambia)	500	400	400	250	280	150
Bradenton (Manatee)	N/A	N/A	N/A	N/A	N/A	145
Palm Beach (Palm Beach)	150	196	290	279	274	n/a
New Port Richey, Dade City, Zephyrhills (Pasco)	N/A	N/A	N/A	N/A	N/A	N/A
Jacksonville (Duval)	N/A	N/A	N/A	N/A	N/A	N/A
Orlando	312	302	322	328	364	396

Number of Actual Productions Film Office	Fiscal Year					
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Miami (Miami-Dade)	1,064	1,240	1,730	1,911	1,992	1,635
Daytona Beach (Volusia)	N/A	N/A	N/A	N/A	N/A	N/A
St. Petersburg, Clearwater (Pinellas)	126	139	135	152	190	98
Pensacola (Escambia)	20	20	12	12	15	8
Bradenton (Manatee)	N/A	N/A	N/A	N/A	N/A	18
Palm Beach (Palm Beach)	591	686	637	629	525	N/A
New Port Richey, Dade City, Zephyrhills (Pasco)	N/A	N/A	N/A	N/A	N/A	N/A
Jacksonville (Duval)	N/A	N/A	78	54	63	43
Orlando	N/A	N/A	N/A	N/A	N/A	N/A

Number of Scouts Facilitated Film Office	Fiscal Year					
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Miami (Miami-Dade)	2-3	2-3	2-3	2-3	2-3	2-3
Daytona Beach (Volusia)	N/A	N/A	N/A	N/A	N/A	N/A
St. Petersburg, Clearwater (Pinellas)	N/A	N/A	N/A	10	9	8
Pensacola (Escambia)	20	20	20	20	20	20
Bradenton (Manatee)	N/A	N/A	N/A	N/A	N/A	16
Palm Beach (Palm Beach)	N/A	N/A	N/A	N/A	N/A	N/A
New Port Richey, Dade City, Zephyrhills (Pasco)	N/A	N/A	N/A	N/A	N/A	N/A
St. Lucie (St. Lucie)	N/A	1	1	N/A	N/A	N/A
Jacksonville (Duval)	N/A	N/A	19	20	22	21
Orlando	N/A	N/A	N/A	N/A	N/A	N/A

Number of Permits Issued Film Office	Fiscal Year					
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Miami (Miami-Dade)	1,064	1,240	1,730	1,911	1,992	1,635
Daytona Beach (Volusia)	29	43	20	12	20	10
St. Petersburg, Clearwater (Pinellas)	N/A	N/A	N/A	132	150	83
Pensacola (Escambia)	N/A	N/A	N/A	N/A	N/A	N/A
Bradenton (Manatee)	N/A	N/A	N/A	N/A	N/A	18
Palm Beach (Palm Beach)	211	177	203	172	225	N/A
New Port Richey, Dade City, Zephyrhills (Pasco)	N/A	N/A	N/A	N/A	N/A	N/A
Jacksonville (Duval)	N/A	N/A	78	54	63	43
Orlando	119	223	226	164	206	179

Number of Production Days Film Office	Fiscal Year					
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Miami (Miami-Dade)	7,992	13,681	11,424	12,322	11,112	9,328
Daytona Beach (Volusia)	87	132	65	39	64	38
St. Petersburg, Clearwater (Pinellas)	N/A	N/A	N/A	N/A	N/A	N/A
Pensacola (Escambia)	100	120	75	60	50	20
Bradenton (Manatee)	N/A	N/A	N/A	N/A	N/A	35
Palm Beach (Palm Beach)	15,808	12,098	11,668	15,345	15,312	N/A
New Port Richey, Dade City, Zephyrhills (Pasco)	N/A	N/A	N/A	N/A	N/A	N/A
St. Lucie (St. Lucie)	N/A	100	2	N/A	5	4
Jacksonville (Duval)	N/A	N/A	329	162	227	142
Orlando	N/A	N/A	N/A	N/A	N/A	N/A

Number of County Residents Hired Film Office	Fiscal Year					
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Miami (Miami-Dade)	15,033	10,456	17,568	18,080	15,685	19,986
Daytona Beach (Volusia)	N/A	N/A	N/A	N/A	N/A	N/A
St. Petersburg, Clearwater (Pinellas)	N/A	N/A	1,238	1,903	1,196	N/A
Pensacola (Escambia)	40	40	30	20	20	10
Bradenton (Manatee)	N/A	N/A	N/A	N/A	N/A	N/A
Palm Beach (Palm Beach)	2,948	4,602	4,159	4,726	4,289	N/A
New Port Richey, Dade City, Zephyrhills (Pasco)	N/A	N/A	N/A	N/A	N/A	N/A
St. Lucie (St. Lucie)	N/A	12-15	5	N/A	5-10	5
Jacksonville (Duval)	N/A	N/A	1,821*	689	1,041	1,481
Orlando	N/A	N/A	N/A	N/A	N/A	N/A

*after 1/1/2005

Number of Hotel/Motel Rooms Booked Film Office	Fiscal Year					
	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Miami (Miami-Dade)	30,169	27,222	44,651	34,143	34,673	29,082
Daytona Beach (Volusia)	N/A	N/A	N/A	N/A	N/A	N/A
St. Petersburg, Clearwater (Pinellas)	N/A	N/A	N/A	N/A	N/A	N/A
Pensacola (Escambia)	650	685	410	400	250	120
Bradenton (Manatee)	N/A	N/A	N/A	N/A	N/A	N/A
Palm Beach (Palm Beach)	9,703	17,117	15,553	15,787	17,437	N/A
New Port Richey, Dade City, Zephyrhills (Pasco)	N/A	N/A	N/A	N/A	N/A	N/A
		30 rooms for				
St. Lucie (St. Lucie)	N/A	3 months	N/A	N/A	N/A	N/A
Jacksonville (Duval)	N/A	N/A	3,661	3,260	3,510	5,950
Orlando	N/A	N/A	N/A	N/A	N/A	N/A

Appendix J – Production Incentives Summary

State	Incentive Summary	Notes
Alabama	Rebate of 25 percent of a qualified production's expenditures excluding payroll paid to residents of Alabama plus 35 percent of all payroll paid to residents of Alabama for the production, if the total production expenditures for a project equal or exceed \$500,000 but not more than \$10,000,000. Exemption from sales, use, and lodging taxes for qualified production company that spends more than \$150,000 in state. (proposed -- see Notes).	Previous AL incentives ended 9/30/06. Bill is currently before Legislature to create new incentive package. Text of bill is at http://www.alabamafilm.org/2009%20Lindsey%20Film%20Bill.pdf .
Alaska	Must spend at least \$100,000 in a consecutive 24 month period. 30 percent transferable tax credit on qualified expenditures. Claim an extra 10% for wages paid to Alaska residents. Claim an extra 2% if filming in a rural area. Claim an extra 2% if filming between October 1 and March 30. No salary cap per employee per production.	Alaska Film Office newly created this year. Text of legislation: http://www.legis.state.ak.us/basis/get_bill_text.asp?hsid=SB0230Z&session=25 . http://www.dced.state.ak.us/oed/film/bulletinboard.htm
Arizona	For motion pictures and commercials/music videos: Transaction Privilege Tax exemptions of approximately 6% off of purchases; use tax exemptions of approximately 5% off of out-of-state purchases; income tax credits equal to 20% or 30% of the company's investment in eligible Arizona production costs. A transferable Arizona income tax credit is available for related infrastructure projects (e.g., soundstage building).	Program established in 2005. http://www.azcommerce.com/Film/Incentives/Home.htm
Arkansas	No incentives found.	Arkansas has a film commission website (http://arkansasfilmcommission.com/) that redirects to http://arkansasedc.com/business_development/film/ , but that link doesn't work. A search of the state Economic Development Commission website (http://arkansasedc.com/) doesn't turn up anything on film. Apparently there was a film incentive package but it sunsetted 6/30/08: http://www.arktimes.com/Articles/ArticleViewer.aspx?ArticleID=0d49980b-ce45-4fd9-8936-3dfa6cf4e968

<p>California</p>	<p>The State Theatrical Arts Resources (STAR) Partnership offers filmmakers access to unused, distinctive State-owned properties (e.g., health facilities, vacant office structures, prisons, etc.) for cost recovery expenses only. No State hotel tax on occupancy. Most cities or counties that impose a local hotel tax have a tax exemption for occupancies in excess of 30 days. San Francisco offers a refund on all San Francisco payroll taxes paid and a portion of hotel and sales tax paid to the City during production of a Feature Film or Television program. 5% sales tax exemption on the purchase or lease of post-production equipment for qualified persons. (Exemption is taken by the seller of the equipment and passed on to the buyer at the point of purchase.) Free permits for California State properties. No location fees for California State properties. Most properties require reimbursement for monitors. One-stop film office for California State properties. On-site location library and CinemaScout, (www.cinemascout.org), a web-based location finder for sites throughout California. On-site California Highway Patrol (CHP) Film Liaison available to assist with filming on State freeways and highways. This liaison also arranges CHP officers to monitor film shoots. On-site California State Fire Marshal available to provide advice and approval for pyrotechnics and other special effect permits for State properties. Coordination with more than 55 in-state film commissions. CFC will e-mail customized location requests to designated film commission offices. Production and troubleshooting assistance.</p>	<p>The Film California First program, currently unfunded, directly reimbursed production companies certain costs associated when filming on public property. These reimbursements fell into 4 categories: personnel - available for public employees assigned to work on film shoots; permits - any permit costs associated with filming on state property; public property fees - those costs associated with filming on state properties; and public equipment fees - the costs incurred when using equipment mandated by the state on public property. Recent enhancements to the program included increased reimbursement levels as well as an expansion of the number of shoots that could be considered for reimbursement. The program was capped at \$300,000 per production. http://www.film.ca.gov/ProductionTools/Incentives.html http://www.ncsl.org/programs/arts/taxfilm.htm</p>
<p>Colorado</p>	<p>Rebates 10% of the below-the-line cost of producing a film, documentary, or television program when that project is produced and filmed in Colorado, the production company spends 75% of its below-the-line budget with Colorado businesses, and hires 75% of its crew locally.</p>	<p>First film incentive legislation passed in 2006. http://www.coloradofilm.org/locationcolorado-film incentives.htm Legislation is here: http://www.leg.state.co.us/clics2006a/csl.nsf/fsbillcont3/1216A396D334707287257066006FC038?open&file=1362_enr.pdf</p>
<p>Connecticut</p>	<p>Eligible production companies receive a tax credit of up to 30% of qualified digital media and motion picture production, pre-production and post production expenses incurred in the state. There is a hotel tax exemption that goes into effect after 30 days. The same property tax exemption that applies to machinery and equipment whose predominant use is for manufacturing, processing or fabricating applies to equipment used in the production of motion pictures, video and sound recordings. Items such as film stock, videotape, equipment rentals and purchases, and other purchases are exempt from sales tax.</p>	<p>Tax credit program established in 2006. http://www.cultureandtourism.org/cct/taxonomy/taxonomy.asp?DLN=43531&cctNav= 43531 </p>
<p>Delaware</p>	<p>Tax features from which film makers or production companies may benefit include: no state or local general sales tax, no personal property or inventory taxes, low real property taxes, and corporate income tax credits and reduction of gross receipts taxes for new and expanded businesses. Additional tax credits on corporate income and reduction of gross receipt taxes for new and expanding businesses locating in 30 targeted census tracts. Property tax relief for new construction and improvements of existing property. Exemption of certain investment and holding companies from corporate income tax.</p>	<p>http://dedo.delaware.gov/filmoffice/information/incentives.shtml</p>

District of Columbia	Film DC Economic Incentive Grant Fund offers grants to production companies that expend at least \$500,000 in the District and film for 5 or more days in the District. The recipient of the grant will receive an amount not to exceed the lesser of 10 percent of qualified expenses or 100 percent of the sales and use taxes paid to the District on the qualified expenses.	Program began in 2006. http://www.film.dc.gov/film/cwp/view,A,3,Q,638410.asp
Florida	Films, TV, Commercials and Music Videos with Qualified Expenditures \$625,000 or more are eligible for 15-22% cash rebate; multiple commercials or videos with \$500,000 or more in combined qualified expenditures (with a minimum of \$100,000 of qualified expenditures per production) are eligible for a 15-20% cash rebate; Indie Florida feature films or documentaries at least 70 minutes long with qualified expenditures of \$100,000 up to \$625,000 are eligible for a 15-17% cash rebate; digital media projects are eligible for a 10% cash rebate. There is a 2% bonus for family friendly content. Florida also offers a sales tax exemption to any qualified production company filming a movie, television show, commercial, music video or sound recording.	www.filminflorida.com
Georgia	Georgia Entertainment Industry Investment Act: Previous multi-part, tier incentive is now 20% flat tax credit on qualified Georgia expenditures. The foundation of the Act is a 20% investment tax credit. Production companies that spend a minimum of \$500,000 in the state on qualified production and post production expenditures in a single year are eligible for this credit. This includes most materials, services and labor. The 20% credit applies to both residential and out-of-town hires working in Georgia with a salary cap of \$500,000 per person, per production, when the employee is paid by salary. Provides an additional 10% tax credit if a production company includes a Georgia promotional logo in the qualified finished feature film, TV series, music video or video game project. Provides the same tax credits to all in-state and out-of-state labor working in Georgia. Commercials and music videos are eligible for the 20% base tax credit once the production company has spent a minimum of \$500,000 on qualified expenditures during a single year. This may be through a single project or multiple projects. The tax credits apply to the company's Georgia tax liability. Should the company have limited or no Georgia tax liability, then the credit may be transferred or sold once to one or multiple Georgia-based taxpayers to use against their tax liabilities. In addition to feature film and television production, the Act also includes other areas of original entertainment content creation including animation, interactive entertainment and video game development. Productions may also qualify to take advantage of Georgia's Sales and Use Tax Exemption, a point-of-purchase sales tax exemption that saves up to 8% on most purchases and rentals in the state.	Entertainment Industry Investment Act new in 2008. http://www.georgia.org/EntertainmentIndustry/AboutTheIndustry/Incentives.htm

Hawaii	Refundable tax credit based on a production company's Hawaii expenditures while producing a qualified film, television, commercial or digital media project. The credit equals 15% of qualified production costs incurred on Oahu, and 20% on the neighbor islands (Big Island, Kauai, Lanai, Maui, Molokai). Also available is a non-refundable high-technology business investment income tax credit applicable to Hawaii taxpayers that invest in qualified companies producing "performing arts products," including film, television, video, audio, and animation products. The credit is equal to 100% of the investment amount, payable over five years.	http://www.hawaiifilmoffice.com/film/incentives-tax-credits
Idaho	Motion Media Rebate Fund would provide a 20% rebate for qualifying productions on all goods and services purchased in Idaho if at least \$200,000 is spent in Idaho and at least 20% of crew are Idaho residents. Capped at \$500,000 per production. Other incentives include a rebate of the 6% sales tax on tangible personal property when \$200,000 is spent on qualifying expenses. Production personnel who are staying 30 days or more in Idaho lodging facilities are exempt from both sales and lodging taxes, currently 8%, as well as local option taxes levied in certain communities.	Motion Media Rebate Fund legislation was passed in March 2008 and was supposed to go into effect July 1, 2008, if it was funded. Apparently funding requires a separate legislative request and is unlikely in 2008. http://www.filmidaho.org/incentives.aspx http://www.filmidaho.org/film/incentivebillpassessenatecommittee.aspx
Illinois	Tax credit: 20% of the Illinois production spending for the taxable year and 20% credit on Illinois salaries up to \$100,000 per worker. Tax may be carried forward for 5 years. Eligibility threshold: For productions 29 minutes and under, \$50,000 spent. For productions 30 minutes or more, \$100,000 spent.	Illinois Film Production Tax Credit is new legislation and covers productions commencing after May 27, 2008. http://www.commerce.state.il.us/dceo/Bureaus/Film/Tax+Incentives/
Indiana	Media Production Expenditure Tax Credit provides individuals and companies a refundable tax credit of up to 15% of qualified investment in a qualified media production project. Acquisitions of tangible personal property are exempt from the state gross retail tax if the person acquiring the property acquires it for the person's use in a qualified media production. The lodging tax does not apply to the renting or furnishing of lodgings to a person for a period of thirty (30) days or more. In addition, the sales tax is also waived.	Media Production Expenditure Tax Credit new in 2008. http://www.in.gov/film/26.htm
Iowa	Investors and producers earn 25% of qualified spending as transferable Iowa income tax credits. Registration requirements: At least \$100,000 spending in Iowa, distribution beyond Midwest region, and application and contract. There is also a 100% income exclusion for Iowa-based vendors or vendors incorporated in Iowa. No caps per project or program. Lodging tax waived on the 32nd day. State property free for locations. No state permits or fees.	http://www.traveliowa.com/film/incentives.html
Kansas	No hotel occupancy tax for stays in excess of 28 days.	http://kdoch.state.ks.us/kdfilm/fc_regulations.jsp#Incentives
Kentucky	Sales tax rebate program: Entitles eligible motion picture and television production companies to a refund of Kentucky's 6% sales and use tax on expenditures made in connection with the production.	http://www.kyfilmoffice.com/taxrebateinfo.htm

Louisiana	<p>Provides a transferable Investor Tax Credit equal to 25% of the in-state investment made if it is in excess of \$300,000. This decreases to 20% 7/1/2010 and to 15% 7/1/2012.</p> <p>The Labor Tax Credit is a separate program and provides an additional transferable 10% tax credit based on the total payroll of Louisiana residents employed in connection with the production (no salaries in excess of \$1 million qualify).</p> <p>There is also a State Income Tax Credit of 40% for productions that spend more than \$300,000. This credit only runs from 7/1/2005 to 1/1/2009.</p>	<p>http://lafilm.org/incentives/ Tax credits were changed 2007 to present numbers. Law is here: http://www.ftbfilm.com/files/THE%20ACT.pdf</p> <p>Interesting article about FBI investigation of LA film incentives: http://blog.nola.com/times-picayune/2007/05/fbi_investigating_louisianas_f.html</p>
Maine	<p>Maine Attraction Film Incentive Package includes: wage-tax rebate plan, income tax rebate for investors in media projects, no state sales taxes on most production items, reimbursement on lodging taxes for long-term stays, and no state sales tax on purchases of most fuel and electricity for productions. There are also possible sales tax exemptions for manufacturing, fuel and electricity use, and long-term lodging. Many state parks and lands are available fee-free. Surplus property can be borrowed free from the state.</p>	<p>http://www.filminmaine.com/incentives/default.aspx</p>
Maryland	<p>Rebate of up to 25% of the total direct costs incurred while filming on-location for qualifying film and television productions. Employees earning \$1 million or more are excluded. Production must incur at least \$500,000 in total direct costs in the State, at least 50% of the production's filming must occur in MD, and the production must have nationwide distribution.</p> <p>Also, an exemption from the 6% state sales & use tax is available for sales, rentals and services.</p>	<p>http://www.marylandfilm.org/incentive.htm</p>
Massachusetts	<p>Studios, major producers, and filmmakers who either shoot at least half of their movie or spend at least half of their production budget in the state are eligible for a tax credit equal to 25 cents for every new dollar of spending they bring to the state. Beginning with the start of pre-production and continuing for a period of 12 months, filmmakers are eligible for 100% sales tax exemption on any production-related items purchased in the state. The spending threshold has been lowered to \$50,000 and now covers digital media projects, which extends the benefits of the film tax credit to locally based, small independent and documentary filmmakers.</p>	<p>Recently enacted law provides tax credits. http://www.mafilm.org/tax-credits/ Massachusetts claims to be the only state in the country that allows filmmakers to take their credits either as a direct rebate at 90% of the face value (guaranteed), or to sell them at market rate, whichever is more favorable.</p>
Michigan	<p>A refundable, assignable tax credit of up to 42% of the amount of a production company's expenditures that are incurred in producing a film or other media entertainment project in Michigan. 30%, 40%, and 42% credits exist; depending on where in the state the project is filmed and if below-the-line personnel are Michigan residents. Also a 25% tax credit for film media infrastructure and a 50% worker training tax credit for production companies providing on-the-job training to Michigan residents.</p>	<p>http://www.michigan.gov/documents/filmoffice/film_Incentive_Combined_FAQs_253760_7.pdf</p>
Minnesota	<p>"Snowbate" production rebate program is a reimbursement of 15% to 20% of Minnesota production expenditures. Also, Minnesota expenditures for TV commercial production and post-production are exempt from Minnesota sales tax, and all production personnel who stay in a hotel or other lodging under a lease agreement for 30 days or longer are exempt from state lodging tax.</p>	<p>Snowbate program discontinued in 2002 but was brought back in 2006. http://www.mnfilmtv.org/incentives_snowbate.php</p>

Mississippi	<p>Mississippi Motion Picture Incentive Program: A production company that has an approved project is eligible for a 20% rebate of their base investment (local spend) in Mississippi. The base investment is based on production expenditures in Mississippi, including, but not limited to, goods and services, fees, equipment rental or purchase, payments to travel agencies. Purchases of real property and automobiles may also apply. There is a \$20,000 minimum local spend per project, and \$8 million per project maximum, and a \$20 million annual cap.</p> <p>A production company that has an approved project is eligible for a 25% rebate on payroll paid to resident cast and crew whose wages are subject to Mississippi Income Tax Withholding and for that portion of their salary for the project up to and including \$1 million. The rebate for non-resident cast and crew is 20%.</p> <p>Items used directly in the production of a film are exempt from the state's 7% sales and use tax. Production equipment and machinery used directly in the filming and/or editing of a project may be taxed at the reduced rate of 1.5%.</p>	<p>Incentive program new in 2008. http://www.visitmississippi.org/film/08_MS_MOTION_PICTURE_INCENTIVE_PROGRAM.pdf</p>
Missouri	<p>State Tax Credits are issued for up to 35 percent of the amount expended in Missouri for production or production-related activities. Expenditure threshold: \$100,000 for films more than 30 minutes in length and at least \$50,000 for films less than 30 minutes in length. Credit carries forward for 5 years and is sellable or transferable.</p>	<p>The entire film production tax credit program is capped at \$4.5 million. http://www.missouribusiness.net/film/incentives.asp</p>
Montana	<p>14% refundable tax credit based on hired Montana Labor; applies to first \$50,000 of wages per Montana resident. 9% refundable tax credit based on qualified expenditures. Montana has no sales tax. Borrowing privileges for state property such as office furniture and signage. Production companies staying longer than 30 days at the same hotel/motel are exempt from the 7% accommodations tax. Out-of-state commercial vehicles and equipment used exclusively in the production of motion pictures, television, or commercials are exempt from licensing requirements for 180 consecutive days.</p>	<p>http://montanafilm.com/incentives1.htm</p>
Nebraska	<p>None available.</p>	<p>Legislation to create incentives was introduced in 2007 but was indefinitely postponed in April 2008. http://www.neded.org/content/view/515/1265/</p>
Nevada	<p>None available.</p>	<p>In the last two legislative sessions a 5% tax incentive was introduced but did not pass. http://www.nevadafilm.com/</p>
New Hampshire	<p>No specific film tax incentive because NH already has no sales tax, personal income tax, capital gains tax or use tax. Also no general filming permits required.</p>	<p>http://www.nh.gov/film/incentives.htm</p>

<p>New Jersey</p>	<p>A tax credit in an amount equal to 20% of qualified production expenses. At least 60% of the total expenses of a project, exclusive of post-production costs, must be incurred for services performed and goods used or consumed in New Jersey. Principal photography of a project must commence within 150 days after the approval of the application for the credit. There is also a 20% corporation business tax credit, for qualified expenses incurred by New Jersey technology companies involved with the production of digital media content. Certain tangible property used directly and primarily in the production of films and television programs is exempt from New Jersey's 7% sales tax. The Film Production Assistance Program allows film projects to be eligible for loan guarantees through the New Jersey Economic Development Authority. Loan guarantees cannot exceed 30% of the bank financing cost of the project, or \$1.5 million, whichever is less.</p>	<p>http://www.njfilm.org/</p>
<p>New Mexico</p>	<p>Film Production Tax Rebate: offers a 25% Tax Rebate on all direct production expenditures, including New Mexico labor, that are subject to taxation by the State of New Mexico. This is a refund on the full amount of the expenditure, not just the tax portion. There is no minimum spend required, no cap, and no sunset clause.</p> <p>Film Investment Loan Program: offers a 0% loan, with backend participation in lieu of interest, for up to \$15 million per project (which can represent 100% of the budget) for qualifying feature films or television projects - animation included. Terms are negotiated and budget must be at least \$2 million.</p> <p>Sales Tax Exemption: The state issues Type 16 Nontaxable Transaction Certificates (NTTCs). A certificate is presented at the point of sale and no gross receipts tax is charged. These may not be combined with the 25% Tax Rebate and are usually used for commercials or PSAs.</p> <p>Film Crew Advancement Program: offers a 50% reimbursement of wages for on-the-job training of New Mexico residents in advanced below-the-line crew positions.</p>	<p>http://www.nmfilm.com/filming/incentives/</p>

<p>New York</p>	<p>New York City and New York State offer Film Production Tax Credit programs, which combined provide qualifying film and television productions a fully-refundable tax credit equal to 35% of production expenditures. Eligible productions include: feature films, episodic television series, television pilots, and television movies and miniseries. The New York State program provides a refundable 30% tax credit, and the New York City program provides an additional 5% credit.</p> <p>The State of New York has allocated \$25 million in aggregate credits per calendar year for 2004 and 2005, \$60 million for 2008, \$75 million for 2009, \$85 million for 2010, \$90 million for 2011 and 2012, and \$110 million for 2013. The City of New York has allocated \$12.5 million per year for 2005 and \$30 million per calendar year from 2006 through 2011, for a total of \$602.5 million. These credits will be offered on a first come, first serve basis. The refundable credit is applied to the applicant's New York State and/or New York City tax return/s for the year in which the production was completed.</p> <p>New York State now offers fully-refundable tax credits to qualified commercial production companies shooting commercials within the state. There are three component credit programs—an Upstate program, a Downstate program, and a Growth program. In the Upstate and Downstate programs, after meeting certain minimum annual thresholds, a company can earn 5% on qualified expenditures on qualified commercials. In the Growth program a company can earn 20% on any incremental increase in qualified costs from one year to the next.</p> <p>Sales Tax Exemption: Productions are given the same exemptions available to New York's manufacturers, including purchases of machinery, equipment, parts, tools and supplies used in production. The exemption also covers services like installing, repairing, and maintaining production equipment and the fuel and utility services used for production. In addition, goods and services purchased for resale are exempt from tax.</p> <p>Investment Tax Credit for Qualified Film Production Facilities: For corporate taxpayers, a 5% tax credit with respect to the first \$350 million of the investment credit base, and 4% with respect to the investment credit base in excess of \$350 million; for personal income taxpayers, a 4% tax credit of the investment credit base. A taxpayer claiming the ITC may also be eligible for an additional Employment Incentive Tax Credit of 1.5% to 2.5% of the same new capital investment (production facilities and equipment only); in each of the two years following the year the ITC is claimed if employment in those years reaches specified levels.</p>	<p>http://www.nyc.gov/html/film/html/incentives/tax_credit_overview.shtml http://www.nylovesfilm.com/tax.asp</p>
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North Carolina	<p>A 15% tax credit in North Carolina on a minimum \$250,000 in-state spending. Tax credit is a refund. Credit may not exceed \$7.5M (~\$50M in-state spending). Eligible productions include film, television, direct-to-video/DVD features, episodic television series, television mini-series, theatrical, animation productions, and commercials.</p> <p>Spending for goods (fuel, food, airline tickets, etc) purchased or leased from an NC business is eligible for the tax credit if purchased in NC for an NC production. Compensation and wages paid to employees for services performed in NC on which withholding payments are remitted to the NC Department of Revenue are eligible for the tax credit regardless of whether paid to residents or non-residents. (Wages up to \$1,000,000 qualify.) Payments for per diem and fringe benefits are eligible to the extent they are included in the recipient's taxable wages subject to withholding. The cost of production-related insurance qualifies. North Carolina must receive on-screen credit.</p> <p>A reduced "privilege tax" of just 1% (the current NC Sales and Use Tax is 4.25%) is available for film production-related, in-state purchases and rentals.</p> <p>Qualified Business Investment Tax Credit Program: offers investors in certain types of businesses (manufacturing, processing, warehousing, wholesaling, research and development, or a service-related industry) a credit against state tax liability which can be as much as 25% of the amount invested.</p> <p>Receipts derived from the rental of any room, lodging or accommodation to the same person for a period of 90 continuous days or more are NOT subject to the general rate of State tax (4.5%) and any applicable local sales or use tax (minimum 2.25%).</p>	Tax incentive recently extended to January 1, 2014. http://www.ncfilm.com/incentives-benefits.html
North Dakota	No specific incentives, but film companies may qualify for an income tax exemption available to "primary sector businesses which add value to a product, process or service which creates new wealth." This exemption requires approval by the State Board of Equalization.	http://www.ndtourism.com/industry/media-links/government/
Ohio	No incentives program.	Ohio Film Office appears to be brand new. http://www.discoverohiofilm.com/ohiofilmoffice.html
Oklahoma	<p>The Oklahoma Film Enhancement Rebate offers up to 15% on Oklahoma expenditures to qualifying companies filming in the state capped at \$5 million per year. Company must have a minimum budget of \$500,000 and spend \$300,000 in Oklahoma and must employ Oklahoma residents for at least 50% of its below-the-line crew to qualify for full 15% rebate (smaller rebates available).</p> <p>Tax Credit for Construction of Oklahoma Film & Music Facilities offers companies building production facilities in Oklahoma state income tax credits ranging from 10% on a minimum \$500,000 construction project to 25% for projects over \$1 million.</p> <p>Tax Credit for Oklahoma Film & Music Projects gives state taxpayers who invest in film or music projects produced in Oklahoma a 25% income tax credit on profits made when those profits are reinvested in another film or music project produced in Oklahoma.</p> <p>Point of Purchase Tax Exemption to qualified</p>	http://www.oklahomafilm.org/DesktopDefault.aspx?tabindex=3&tabid=6

	productions on sales taxes paid for property or services to be used in productions (cannot be used in conjunction with 15% rebate above).	
Oregon	Oregon Production Investment Fund rebates 20% of goods/services and 10% of Oregon-based payroll (including fringe benefits). Applies to projects spending a minimum of \$750,000 in Oregon for any single project or season of a series. Greenlight Oregon Labor Rebate rebates 6.2% of payroll for which Oregon withholding applies. Applies to single projects or season of a series spending a minimum of \$1M in Oregon, as well as commercial production companies with an aggregate Oregon spend of \$1M or more per calendar year. These are cash rebates as opposed to tax credits.	http://oregonfilm.org/incentives/
Pennsylvania	Pennsylvania offers a 25% tax credit to films that spend at least 60% of their total budget in PA. The program is capped at \$75 million for the Fiscal Year July 1, 2008 - June 30, 2009.	http://www.filminpa.com/filminpa/econIncentives.jsp
Rhode Island	25% motion picture company transferrable tax credit for all Rhode Island spending. It also includes salaries for people working on the ground, in RI. The film/TV commercial/video game production must be filmed primarily in RI and have a minimum budget of \$300,000.	http://www.film.ri.gov/incentives.html
South Carolina	Productions that film in South Carolina and spend at least \$1,000,000 in the state can receive up to a 20% cash rebate on in-state employee wages and a 10% cash rebate up to \$3500 on out-of-state employee wages. Out-of-state performing artists (including stunt performers) are eligible for the full 20% cash rebate. Additionally, South Carolina offers up to a 30% cash rebate on in-state supplier expenditures if at least \$1,000,000 is spent in the state. The 20% wage rebate applies to any employee of the production whose wages are subject to SC withholding tax and earns less than \$1,000,000. The 30% supplier rebate applies to all goods and services acquired from a South Carolina supplier. Production auditing is completed by South Carolina - saving the production an estimate \$15 - \$50k. All productions spending over \$250,000 in South Carolina are exempt from sales and accommodations taxes, and all film productions are eligible to use state properties location fee-free.	http://www.scfilmoffice.com/

South Dakota	100% of South Dakota contractor's excise tax and 100% of South Dakota sales and use tax will be refunded on South Dakota project costs greater than \$250,000.	http://www.filmsd.com/Filming%20Tax%20Refund%20FAQ%20and%20App.pdf
Tennessee	Tax Rebate Program: A 13-17% tax rebate depending on the budget and percentage of in-state production. Headquarters Incentive Program: Film production companies that establish a permanent headquarters facility in Tennessee and incur a minimum of \$1 million in qualified expenses in the state may be eligible for a 15 percent refund of the company's qualified expenses.	http://www.film.tennessee.gov/incentives.htm
Texas	Texas Moving Image Industry Incentive Program offers qualifying productions a payment equal to 5% of their in-state spending. Payment is 6.25% for projects made in underused areas of Texas. Sales tax exemption on most items rented or purchased for direct use in production. Refunds of the 6% State Occupancy Tax on hotel rooms occupied for more than 30 consecutive days. Refunds on Fuel Tax paid on fuel used off-road.	http://governor.state.tx.us/film/incentives/overview/
Utah	Motion Picture Incentive Fund is a post-performance rebate of production dollars spent in the state of Utah. An approved production will be rebated 15% on every dollar spent in the state of Utah. Must spend a minimum of \$1,000,000 in the state to qualify. The maximum benefit is \$500,000. Sales tax exemption for machinery and equipment. Accommodation charges for stays of 30 consecutive days or longer are exempt from sales and use tax and all sales-related taxes.	Motion Picture Incentive Fund was increased from 10% to 15% in 2008. http://film.utah.gov/incentives.htm
Vermont	Hotel: For stays of 31 or more days, the rental of a room is not taxable if contracted in advance with a hotel/motel/inn. Sales: An exemption of tax on the purchase or rental of goods and services used in the making of a motion picture, television program or commercial. Those goods and services must appear in the film or be directly used in making the print. Income Tax: Non-resident performers subject to income tax derived from business conducted in Vermont is limited to that amount they would pay in their home state.	http://www.vermontfilm.com/incentives
Virginia	Governor's Motion Picture Opportunity Fund: Performance-based incentive provides a cash rebate at the Governor's discretion, taking into consideration length of filming, job creation, trainees hired, and goods and services purchased. State sales and use tax exemptions (90 days) and state and local lodging (30 days) tax exemptions. Some state-owned locations provided free of location fee. A state-owned 35,000 square foot office building in Richmond is available for office and production space without a fee. Film Office negotiates other free or low-cost locations.	Governor's Motion Picture Opportunity Fund is 2006 legislation. http://www.film.virginia.org/incentives/incentives.aspx
Washington	Up to 20% return on all qualified in-state expenditures. Sales tax exemptions for rental equipment and purchase of services, vehicles used in productions and 30+ day consecutive hotel stays.	http://www.filmwashington.com/incentives/index.html

West Virginia	Up to 31% transferable tax credits (with 2-year carry forward) on direct production and post-production in-state spending (will change to 26% in 2010). Qualified purchases and rentals exempt from 6% sales tax. Lodging stays of over 30 days are exempt from 6% sales tax. Most state-owned property fee-free.	http://www.wvfilm.com/incentives.htm
Wisconsin	An investment tax credit of 25% investing in Wisconsin-based productions. Sales and use tax exemption for machinery, equipment and services used in production and post -production and a 0% tax for all film and television services contracted by out of state production companies. A refundable tax credit of 25% of direct production expenditures. A 15% state income tax credit for film, television and electronic game production businesses that make a capital investment by starting a business in Wisconsin. Use of State-owned buildings and locations free of charge and no fees for permits. New 2008 Film Tax Credit Program: The Film Production Services Credit provides tax credits for salary & wages of Wisconsin residents, production expenditures and sales tax; The Film Production Company Investment Credit provides credits to film production companies doing business in Wisconsin of up to 15% of expenditures for tangible personal property and for the purchase, construction, rehabilitation, remodeling or repair of real property used for film production.	http://www.filmwisconsin.net/Incentives/Synopsis.asp
Wyoming	The Film Industry Financial Incentive program is a cash rebate program for production companies of up to 15% on dollars spent in Wyoming during a film shoot. The production company would have to spend a minimum amount of \$500,000 to qualify and then meet additional criteria (storyline, product placement, etc.) to determine the rebate percentage between 12%-15%.	http://www.wyomingfilm.org/incentive/index.php

Appendix K – Glossary of Incentives

Film Production Incentive Program—A government program that provides a financial incentive to a production company to encourage the production of motion pictures, episodic television, documentaries, music videos, national spots, or national print advertising within its jurisdiction. States and countries fund these programs to encourage economic development, create jobs and gain visibility. The programs generally use tax credits or direct payments to provide the incentive.

Tax Credit—A credit against future taxes owed to the state. The production company would receive a tax credit based on a percentage of qualified in-state expenditures for the production. In order for the production company to benefit from the tax credit, it must owe taxes.

Transferable Tax Credit—Generally, this is a tax credit that can be sold, assigned, exchanged, conveyed or otherwise transferred in whole or in part. This approach gives a production company much more financial flexibility because it can sell its tax credit for cash to another company or individual with a tax liability in the particular state involved. A number of states use this approach because outside production companies often do not have a high enough state tax bill to take full advantage of a production tax credit. The production company can discount the tax credit and sell it to a company that does owe taxes. A broker that specializes in tax credit transfers usually handles this sale. Most states impose a time limit during which the tax credit must be used. In some cases, if the production is solid and approved by the state, the production company can get its funds from a broker before the production begins.

Rebate—A direct cash payment to the production company based on a percentage of qualified expenditures for an in-state film production. This is paid out after the production is completed and the books are closed.

Qualified Expenditures—Film production incentives are generally based upon a group of expenditures made by a production company in connection with the types of productions covered by the incentive program. The expenditures must be directly related to the production and be incurred within the state. They should be reasonable, ordinary and cannot exceed fair market value. Examples: Set construction and operation; wardrobes, make-up, accessories, and related services; photography and sound synchronization; lighting and related services and materials; editing and related services; facilities and equipment rental; vehicle leasing; food and lodging; digital or tape editing, film processing, film transfers sound mixing, special and visual effects; payroll for services performed within the particular state, including all salaries, wages, compensation, and related benefits provided for producers, directors, writers, actors, and other personnel that are directly attributable to services performed in the state; the use of local business for processing qualified payroll and related expenditures; music, if performed, composed, or recorded by an in-state musician; travel, if provided by an in-state business; insurance, if provided by an in-state insurance broker; the design, construction, improvement, or repair of a film, video, television, or digital production or postproduction facility or related property, infrastructure, or equipment; state or local taxes on vehicle rentals or lodging; and other expenses approved by the state film office.

Non-Qualified Expenditures—These are expenses that a production company might incur but are not directly tied to the in-state production effort. They include such items as costs related to acquiring or using the tax credit, marketing and distribution, production financing, depreciation, amortization, or funds reimbursed later to lower production costs, such as advertising placement fees.

Completion Bond—A written contract issued by an insurance company guarantying to the financiers of the project that it will be completed according to the terms of the preapproved application submitted by the production company in its application. Some states require bonds.

Ineligible Productions—This generally includes news, weather, or current events programming, game shows, talk shows, sporting events, award shows; a production produced primarily for internal use for industrial, corporate, or institutional purposes; an advertisement, infomercial, or any other production that solicits funds; a political advertisement; or a production that is determined by the state to be pornographic or not in the best interests of the state; and, in some states, commercials.

Source: Colorado Film and Video Association, <http://www.cfva.com/incentives.html>

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