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MIAMI's #1 Industry - Travel & Tourism

2012 Fast Facts:

- ▶ Record 112,300 jobs in the Travel & Tourism Industry
- ▶ Record 13.9 million overnight visitors to Greater Miami and the Beaches contributed to local businesses and jobs
- ▶ Record \$21.8 billion was spent by visitors on lodging, food, shopping, transportation and entertainment
- ▶ Record \$172.5 million in tourist-related taxes was generated by visitors
- ▶ 33% of state sales taxes collected in Greater Miami and the Beaches were generated by visitors
- ▶ Greater Miami and the Beaches ranked #4 in hotel room rate and occupancy among the Top 25 U.S. Hotel Markets.

Top Ten Domestic Markets by Visitor Count 2012

| MARKETS | VISITORS | PERCENT CHANGE |
|---------------------|-----------|----------------|
| 1. NEW YORK | 1,805,513 | +2.7% |
| 2. CHICAGO | 413,272 | +0.9% |
| 3. PHILADELPHIA | 403,822 | +1.6% |
| 4. BOSTON | 305,949 | +1.5% |
| 5. ATLANTA | 275,124 | +4.0% |
| 6. WASHINGTON, DC | 196,901 | +1.8% |
| 7. DALLAS/FT. WORTH | 188,529 | +2.5% |
| 8. DETROIT | 149,701 | +0.7% |
| 9. LOS ANGELES | 137,824 | +1.2% |
| 10. HOUSTON | 124,098 | +2.0% |

Top Ten International Markets by Visitor Count 2012

| MARKETS | VISITORS | PERCENT CHANGE |
|----------------|----------|----------------|
| 1. BRAZIL | 690,000 | +8.8% |
| 2. CANADA | 640,500 | +2.0% |
| 3. ARGENTINA | 449,330 | +7.5% |
| 4. COLOMBIA | 422,003 | +6.8% |
| 5. VENEZUELA | 379,113 | +7.0% |
| 6. GERMANY | 350,700 | +3.5% |
| 7. ENGLAND | 294,164 | +3.0% |
| 8. BAHAMAS | 236,185 | +2.8% |
| 9. FRANCE | 197,700 | +3.0% |
| 10. COSTA RICA | 186,100 | +2.8% |

The Economic Contribution of the Motion Picture/Television Industry to the U.S.

The industry is a major private sector employer, supporting 1.9 million jobs, and \$104 billion in total wages in 2011:

- Direct industry jobs generated \$43.1 billion in wages, and an average salary 38% higher than the national average:
- There were 284,000 jobs in the core business of producing, marketing, manufacturing, and distributing motion pictures and television shows. These are high quality jobs, with an average salary of nearly \$84,000, 75% higher than the average salary nationwide.
- Additionally, there were over 365,000 jobs in related businesses that distribute motion pictures and television shows to consumers.
- Industry also supports indirect jobs and wages in thousands of companies with which it does business, such as caterers, dry cleaners, florists, hardware and lumber suppliers, and digital equipment suppliers, as well as jobs in other companies doing business with consumers, such as DVD and Blu-ray retailers, theme parks and tourist attractions.

The Influence of a Film on Destination Image and the Desire to Travel: a Cross-Cultural Comparison

Researchers have already asserted that films are more likely to reach wider audiences with less investment than specifically targeted tourism advertisements and promotion (Dore and Crouch, 2003).

- Another recent study found that after family and friends and the Internet, television shows and films were the next key influencer on the decision to travel to a particular country. The survey found that 13% of people initially become interested in a country after seeing the destination on television or film (FutureBrand, 2008).

How Film/Television Programs Can Promote Tourism: Increase the Competitiveness of Tourist Destinations

Film can augment the destination image and increase the awareness of the host city. Previous research (Kim & Richardson, 2003) suggests that those who are exposed to the film have more favorable destination image towards destinations featured through films than those who are not exposed to films.

- Television series are even more influential since they can constantly emphasize the appeal of the destination that builds top-of-the-mind awareness.
- One of the effective strategies to induce film tourists is joint campaigns with the film industry. England is a good example in this sense. Approximately 28 million visitors visit Britain each year after viewing the country on the screen (Kim et al., 2008).
- The Australian Tourism Commission (ATC) worked in partnership with Disney on 'Finding Nemo', being the first organization who promotes a destination through an animated film.
- Movie maps have also been widely used to promote film locations of the destination. Visit Britain produced a movie map highlighting over 200 filmed locations across Britain which presented film-related places. These materials have rapidly become very successful.

Economic Impact of Film Induced Tourism

There has been a longstanding relationship between the film and television and tourism industries in Florida. For example, the production of Miami Vice resulted in a 150% increase in German Visitors to Miami between 1985 and 1988.

- One of the most researched examples of FIT in Florida is the impact the film Dolphin Tale has had on visitation to the Clearwater Marine Aquarium and the St. Petersburg/Clearwater area. In August 2012 a study was conducted by the University of South Florida St. Petersburg College of Business in collaboration with the Clearwater Marine Aquarium on the economic impact of Dolphin Tale on the St. Petersburg/Clearwater local economy.

- The study reported that 72.7% of visitors were driven to the aquarium as a result of the Dolphin Tale film and that the film was expected to continue to drive increased visitation. The model employed in the study projected that 800,000 visitors were expected to visit the aquarium in 2013, increasing to 2.3 million visitors in 2016. The study reported that those visitors would generate an overall economic impact to the local economy of roughly \$580 million in 2013, rising to \$1.7 billion in 2016.

Film Tourism Impacts

| Film or TV Series | Location | Impact on Visitor Numbers or Tourist Revenue |
|---------------------------------------|--|--|
| Braveheart | Wallace Monument, Scotland | 300% increase in visitors year after release |
| Heartbeat | Goathland, North Yorkshire, England | Three times the number of normal visitors in 1991 |
| Deliverance | Rayburn County, Georgia | 20,000 film tourists a year Gross revenues \$2 to 3m |
| Dances with Wolves | Fort Hayes, Kansas | 25% increase compared with 7% for previous 4 years |
| Close Encounters of the Third Kind | Devils Tower, Wyoming | 75% increase in 1975 20% visit now because of the film |
| Thelma and Louise | Arches National Monument in Moab, Utah | 19.1% increase in 1991 |
| Field of Dreams | Iowa | 35,000 visits in 1991 Steady increase every year |
| Dallas | Southfork Ranch, Dallas | 500,000 visitors per year |
| The Lord of the Rings | New Zealand | 10% increase every year 1998 to 2003 from UK |
| Steel Magnolias | Louisiana | 48% increase year after release |
| Last of the Mohicans | Chimney Rock Park, North Carolina | 25% increase year after release |
| The Fugitive | Dillsboro, North Carolina | 11% increase year after release |
| Little Women | Orchard House, Concord, Massachusetts | 65% increase year after release |
| Bull Durham | Durham, North Carolina | 25% increase in attendance year after release |
| Harry Potter | Various locations in U.K. | All locations saw an increase of 50% or more |
| Mission: Impossible 2 | National parks in Sydney | 200% increase in 2000 |
| Gorillas in the Mist | Rwanda | 20% increase in 1998 |
| Crocodile Dundee | Australia | 20.5% increase in U.S. visitors 1981 to 1988 |
| The Beach | Thailand | 22% increase in youth market in 2000 |
| All Creatures Great and Small | Yorkshire Dales | Generated £5m for Yorkshire Dales |
| To the Manor Born | Cricket St Thomas, Leisure Park, England | 37% increase between 1978 to 1980 |
| Middlemarch | Stamford, Lincolnshire, England | 27% increase in 1994 |
| Four Weddings and a Funeral | The Crown Hotel, Amersham, England | Fully booked for at least 3 years |
| Mrs. Brown | Osborne House, Isle of Wight, U.K. | 25% increase |
| Notting Hill | Kenwood House, England | 10% increase in 1 month |
| Saving Private Ryan | Normandy, France | 40% increase in American tourists |
| Sense and Sensibility | Saltram House, England | 39% increase |
| Pride and Prejudice | Lyme Park in Cheshire, UK | 150% increase in visitors |
| Cheers | Location in Boston | \$7m in unpaid promotional advertising each year |
| Miami Vice | Miami | 150% increase in German visitors 1985 to 1988 |
| Forrest Gump | Savannah, Georgia | 7% increase in tourism |
| Troy | Canakkale, Turkey | 73% increase in tourism |
| Captain Corelli's Mandolin | Cephalonia, Greece | 50% increase over 3 years |

Sources: Riley and van Doren (1992); Tooke and Baker (1996); Grihault (2003); Croy and Walker (2003); Cousins and Anderek (1993); Busby, Brunt and Lund (2003); Riley, Baker, and van Doren (1998).

Florida: Economic Impact of the Industry

Industry representatives interviewed believed that film and television production affects tourism in Florida in a number of ways:

- All industry representatives interviewed indicated that a proportion of visitors to Florida are drawn to the state because of images they have seen in films and television shows.
- The majority (75%) of industry representatives indicated that visitors come to Florida to actively seek out specific locations they have seen featured in a film or television show.
- Half of the industry representatives we interviewed noted that while some visitors are not drawn to the region because of film or television production, they sometimes participate in film-related tourism activities during their stay.

Florida: Film Induced Tourism

The motion picture and television industry is responsible for 27,537 direct jobs and \$1.3 billion in wages in Florida, including both production and distribution-related jobs. Nearly 8,000 of the jobs are production-related.

- 2011: During the course of 2011, 15 movies and 12 TV series filmed in the state. Movies include Magic Mike, Parker, Step Up 4, Alvin and the Chipmunks: Chipwrecked, A Fonder Heart, Free Ride, and The Unbroken . TV series include Burn Notice, Charlie's Angels, The Glades, Pitchmen, Basketball Wives, Color Splash, and Animal Cops: Miami.

- 2010: During the course of 2010, 13 movies and 12 TV series filmed in the state. Movies include Dolphin Tale, I am Number Four, If Only You Knew, Beautiful Noise, Homecoming, Dead by Friday, and Transformers: Dark of the Moon . TV series include Burn Notice, The Glades, Little Miss Perfect, The Bad Girls Club: Miami, Two Guys Garage, Operation Wild and Police Women of Broward County.

TV Series Featuring Miami

CY 2011 and Est. 2012 YTD Impressions and Media Value Jan-Jun, 2012

| Programs | Network | Length (min) | 2011-1012 Episodes | Total Imps (Cume) | Total Valuation |
|--------------------------|---------------|--------------|--------------------|-------------------|-----------------|
| The Glades | A&E | 60 | 39 | 104,114,400 | \$19,084,170 |
| Charlie's Angels | A&E | 60 | 4 | 27,600,000 | \$9,998,100 |
| Animal Cops: Miami | Animal Planet | 60 | 26 | 13,930,000 | \$1,717,891 |
| Real Housewives of Miami | Bravo | 60 | 14 | 22,890,000 | \$4,236,939 |
| CSI Miami | CBS | 60 | 36 | 504,000,000 | \$162,629,000 |
| Catalina Hotel | CW | 60 | 2 | 7,280,000 | \$1,096,760 |
| Austin & Ally | Disney | 60 | 21 | 18,040,500 | \$2,688,509 |
| Dexter | HBO | 60 | 12 | 42,000,000 | \$5,974,500 |
| Magic City | Starz | 60 | 14 | 10,010,000 | \$1,508,045 |
| Descontrol | Telemundo | 60 | 66 | 32,832,000 | \$8,256,672 |
| South Beach Tow | TruTV | 30 | 21 | 10,675,000 | \$790,738 |
| Quien Tiene la Razon | Telefutura | 60 | 390 | 198,575,000 | \$49,852,880 |
| Despierta America | Univision | 240 | 390 | 397,150,000 | \$99,705,775 |
| Burn Notice | USA | 60 | 20 | 149,400,000 | \$26,518,500 |
| Basketball Wives | VH1 | 60 | 28 | 30,600,000 | \$10,757,880 |
| Total | | | | 1,569,096,900 | \$404,916,367 |

THANK YOU...