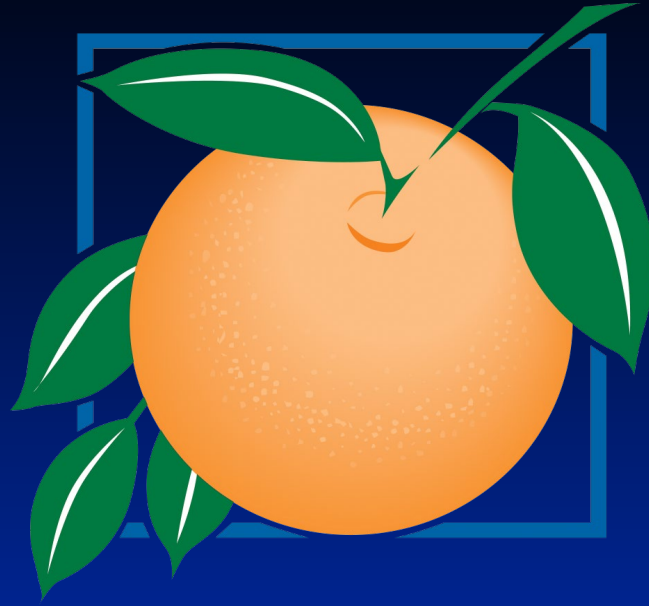
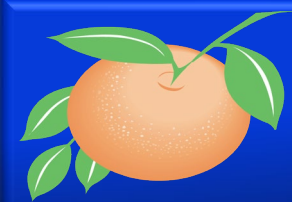




Tourist Development Council Film Incentives Program

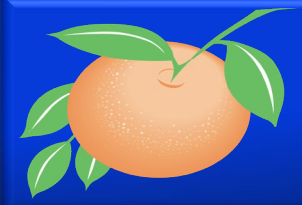
Roseann Harrington
Chief of Staff for Mayor Jerry L. Demings
Orange County Government

September 26, 2025



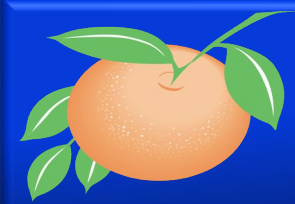
Agenda

- Film Incentive Working Group Overview
- Orlando Film Commission History
- Local Film Education Programs
- Film Production Workforce
- Film Incentive Programs in Florida
- Recommendations
 - Organization
 - Incentive Recommendation
 - Selection Criteria
- Timeline
- Requested Action



Background

- The Orange County Board of County Commission (BCC) approved the creation of a Film Incentive Working Group at the May 7, 2024, meeting.
- The goal of the Working Group was to explore the creation of a film incentive program that would promote and advertise tourism by leveraging the wide-reaching exposure provided by television and motion picture production.
- The nine-member Working Group was comprised of industry subject matter experts and met seven times from August 20, 2024, to September 19, 2025. Each member volunteered more than 25 hours to evaluate opportunities and provide recommendations to include purpose, structure, costs, management, staffing, incentives, oversight and return on investment.

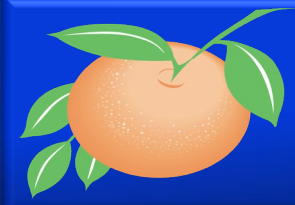


Background - Members

- Carol Bailey- SAG-AFTRA
- Marcelo Chao- Full Sail University
- Professor Eric Fleming- Valencia College
- Brooke Hill- Orlando Film Commission
- John Lux- Film Florida
- Paul Mears- Visit Orlando
- Dr. Lisa Mills- University of Central Florida (UCF)
- Brandon Reese- Motion Picture Association (Disney/Universal Representative)
- James (Jimmy) Roberts- IATSE Local 477

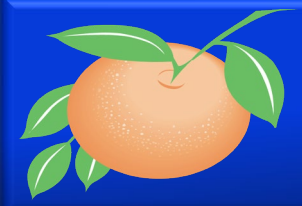
Orange County Staff:

- Roseann Harrington- Chief of Staff - Lead
- Dennis Holste- Economic Development Administrator
- Dylan Schott- Attorney III



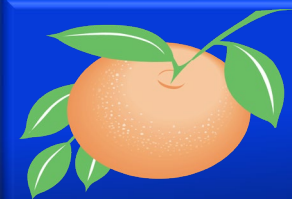
Orlando Film Office History

- The Orlando Film Commission was founded in 1986. In the 1990s, Orlando experienced a great boom in film production due to the construction of Disney-MGM Studios and Universal Studios, and the addition of Nickelodeon Studios. During this period, we acquired the nickname "Hollywood East."
- In 2016, the State of Florida eliminated film incentives which resulted in local programs scaling back. The Orlando Film Commission, became an organization dedicated to permitting and site selection and now called the "Orlando Film Office."
- Georgia stepped up their pursuit of film and television production and now is in the top three states in the United States for film production.



Orlando Film Office History

- Currently resides under the Orlando Economic Partnership
- Responsible for permitting and scouting and acts as a liaison with production companies interested in filming in the region
- Funding of Orlando Film Commission is part of existing contracts with Orange County, Osceola County, Seminole County and the City of Orlando
- One full time employee and a part-time intern



Orlando Film Commission Commercials & Television Permits Fiscal Year October 2024 to September 2025

Regional (Orange, Osceola, and Seminole)

- 165 permits
- 425 permitted production days
- Approximately \$17 million in Economic Impact

Orange County & City of Orlando

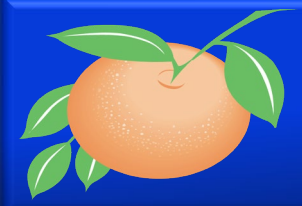
- Economic Impact: \$14,828,880
- Permits: 120 (85 City of Orlando)
- Production Days: 302 (211 City of Orlando)
- Breakdown: 13 Films | 10 Student | 14 Television | 48 Commercials | 18 Other

Osceola County

- Economic Impact: \$2,933,176
- Permits: 29
- Production Days: 108
- Breakdown: 2 Films | 1 Student | 9 Television | 5 Commercials | 5 Other

Seminole County

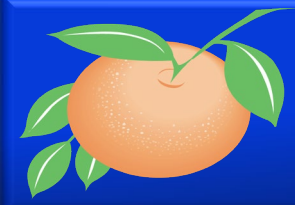
- Economic Impact: \$6,293,435
- Permits: 16
- Production Days: 27
- Breakdown: 3 Films | 1 Student | 3 Television | 6 Commercials | 1 Other



Film Education Programs

- There are multiple institutions that have film educational programs in Central Florida
 - Full Sail University
 - University of Central Florida
 - Valencia College
 - The DAVE School
 - Orange Technical College
 - First Institute

- Highlights
 - Over 3,000 graduates a year from Central Florida Film Programs
 - More than half the graduates leave the area after graduation
 - Top Destinations- Atlanta, Los Angeles, New York, and Chicago



Film Production Employment

Rates

Theatrical Productions (Movies)

Key = \$50.68 hr. / Second = \$45.94 hr. / Third = \$43.01 hr.

1st Year Television Episodic

Key = \$46.89 hr. / Second = \$43.01 hr. / Third = \$40.14 hr.

All Other Television

Key = \$49.74 hr. / Second = \$44.94 hr. / Third = \$42.10 hr.

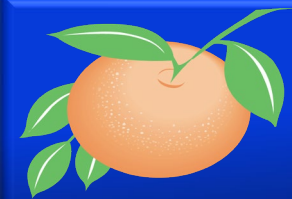
Low Budget (Tier Three) Theatrical Production

Key = \$40.85 hr. / Second = \$36.92 hr. / Third = \$35.26 hr.

Plus full Health & Welfare benefits - Health Insurance, Annuity, Pension

■ **In 2023, the average annual wage of a film industry professional in Florida was \$101,684 exceeding the state's average for all industries by 53%.**

Source: Florida Department of Commerce, Bureau of Workforce Statistics and Economic Research, Quarterly Census of Employment and Wages Program (QCEW).



Florida Film Incentive Programs



Florida Film Incentives

FLORIDA ENTERTAINMENT INDUSTRY SALES TAX EXEMPTION- Any qualified production company may be eligible for a sales-and-use tax exemption on certain production related purchases in Florida. To be exempt from Florida's sales tax at the point of sale, the production company must apply for a certificate of exemption. More info at FilmInFlorida.com.

1. DUVAL COUNTY (Jacksonville)

The Jacksonville Film & Television Program is a performance-based rebate program structured to attract film, television and commercial productions to Jacksonville (Duval County). The program is based upon meeting minimum thresholds on qualified expenditures and hiring of Duval County residents. The program includes two film and television tiers, 15% - 20% offering amounts from \$150K to \$400K, a Commercial Program (15%) offering amounts from \$75K to \$150K and a Fostering Filmmakers Grant Program. More info at filmjax.com/incentive-program, email troobin@coj.net or call 904-255-5434.

2. PINELLAS COUNTY (St. Petersburg / Clearwater)

Film St. Pete Clearwater's Business Development Marketing Program pays 10% - 20% on qualified local expenditures, above- and below-the-line, occurring within Pinellas County and its 24 municipalities. Productions are evaluated based on size of the budget, local spend, and marketing value to the county. More info at Filmspc.com.

3. HILLSBOROUGH COUNTY (Tampa)

Hillsborough County offers a marketing grant of up to 10% (payout capped at \$150K per project) based on the assessed marketing value of projects filming in the Tampa Bay area. All applications are processed on a "first come, first served" basis, and are subject to available funding. Approved projects must film within the same fiscal year as the approved application. The program runs from Oct 1st - Sept 30th. More info at FilmTampaBay.com or contact Tyler Martinolich at tmartinolich@visittampabay.com.

4. PALM BEACH COUNTY (Boca Raton, Jupiter, West Palm Beach)

The goal of the Palm Beach County Film and Television Commission's Sponsorship & Development Program to cultivate, and sponsor shows that further develop the expansive library of original content specific to tourism in The Palm Beaches. Shows considered for sponsorship funding are required to have distribution outside The Palm Beaches marketplace, reaching the homes of potential visitors. More info at pbfilm.com or at admin@pbfilm.com or call 561-233-1000.

5. BROWARD COUNTY (Greater Fort Lauderdale, 31 cities)

The County has Incentive Programs which are performance-based rebate programs and are based on Broward County-centric criteria. Each project's eligibility will be determined on a case-by-case basis. Broward County has (5) different incentive programs with minimum spend requirements ranging from \$400K to \$5M, incentive amounts range from \$175K to \$2.5M. There is also an additional "Emerging Filmmaker" Grant for smaller budgets. Total incentive allocation is \$12M annually, to be reviewed each fiscal year. More info at 954-357-8788 or e-mail: SLighterman@FilmLauderdale.org or CHandreoni@FilmLauderdale.org or visit FilmLauderdale.org.

6. MIAMI-DADE COUNTY (Miami)

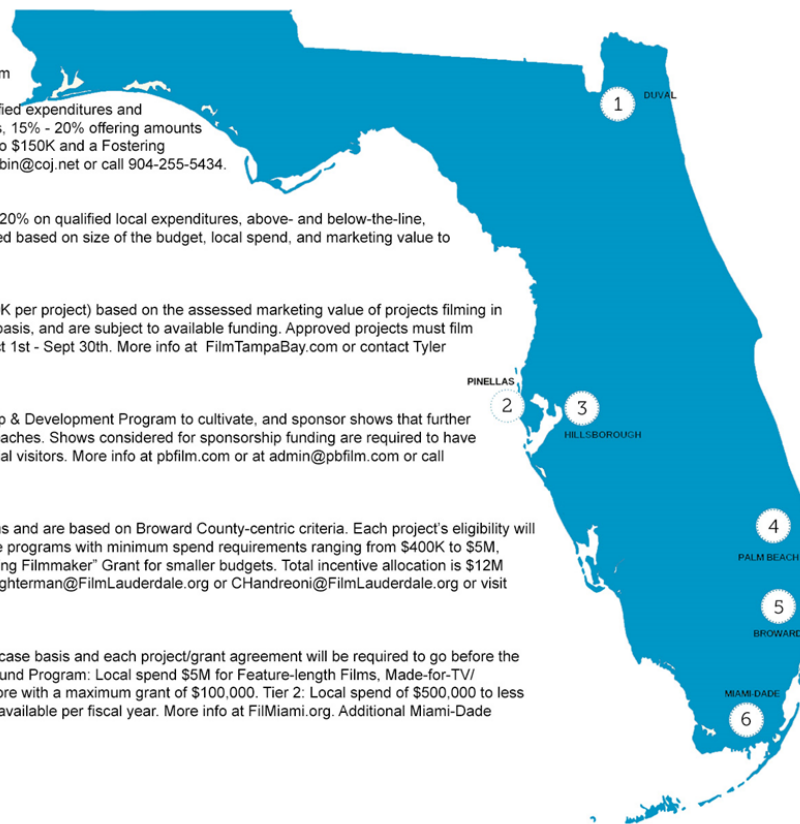
(3) Performance-based grant programs, eligibility will be determined on a case-by-case basis and each project/grant agreement will be required to go before the Board of County Commissioners (BCC) for individual approval. High Impact Film Fund Program: Local spend \$5M for Feature-length Films, Made-for-TV/Streaming Movies or TV/Streaming series. Tier 1: Local spend of \$1,000,000 or more with a maximum grant of \$100,000. Tier 2: Local spend of \$500,000 to less than \$1,000,000 with a maximum grant of \$50,000. Up to \$10M in recurring funds available per fiscal year. More info at FilMiami.org. Additional Miami-Dade County programs below are stackable.

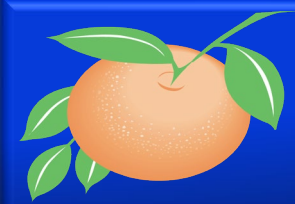
City of Miami Beach

\$10,000 grants with only \$25,000 local spend required. More info at FilMiami.org.

Miami Beach Visitor and Convention Authority

Only available to scripted feature films, scripted television shows, documentaries, short films, tv or streaming service pilot or series, but excluding, commercials, music videos, and all reality and reality-based programming. The applications will be reviewed by the MBVCA and verified by the City of Miami Beach Film and Print Office throughout the fiscal year. More info at miami-beachvca.com.





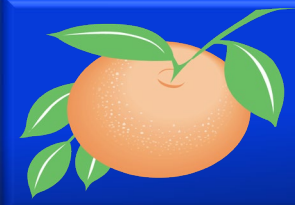
Competing Film Incentive Programs

- **Statewide competitors with film incentive offices & programs**

- **Broward County- \$12 M annually**
- **Miami-Dade County- \$10 M year/\$50 M commitment**
- **Palm Beach- \$2.3 M/\$1 M in incentives**
- **Pinellas County- \$1.6 M annually**
- **Hillsborough County- \$750k annually**
- **Duval County- \$500k annually**

***Palm Beach, Hillsborough & Pinellas Counties utilize TDT funds, and their key metric is hotel night stays.**

- **Florida Department of Commerce offers a point-of-sale Sales Tax Exemption up to 7.5% to qualified production companies producing content in Florida.**

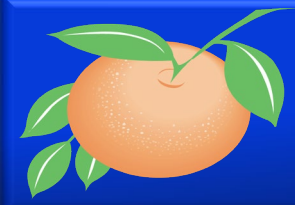


Film Incentive Program Results

Film Tampa Bay

By the Numbers (2013-2024):

- 30,000+ hotel rooms booked by out-of-state industry members during production
 - Film production activated hotels throughout Tampa Bay
- \$105,282 average annual wage
 - Film and digital media provides the highest median annual wage in the State of Florida
- \$100M+ spent on film, TV, commercials, and digital media in Hillsborough County
 - Productions not only hire local crews and stay in local hotels, they also spend significant money activating restaurants, attractions, equipment rental houses, and location and permitting fees.



Film Incentive Program Results cont.

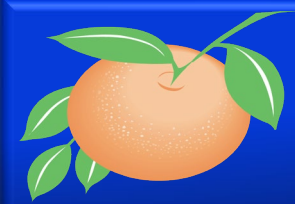
Film Tampa Bay

"According to Tyler Martinolich, executive director of Film Tampa Bay, 2024 was a record year for production activity, and this year is shaping up to be the second-best on record. Martinolich noted that local productions generated more than 6,000 hotel room nights in Hillsborough County last year, and there's already \$31 million worth of projects in the pipeline for next year. "

Source: Tampa Bay Business Journal, August 29, 2025

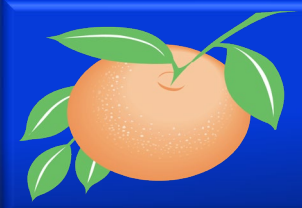
Pinellas County

The Hallmark movie "A Taste of Love" was filmed in Pinellas County from July 12 to July 30, 2021, and according to Visit St. Pete-Clearwater, resulted in an estimated \$1.6 million local spend, 350 room nights and 30 local hires. The movie highlighted iconic local gems such as Sea Sea Riders, Fenway Hotel, and Wild Iris Café/ along with some of the beautiful Pinellas County nature at Clearwater Beach.



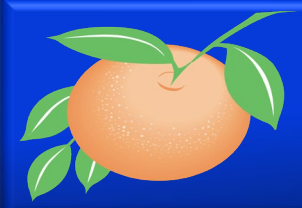
Film Incentive Program Benefits

- Attracts the lucrative TV and film industry to undertake productions in the community and the visitors typically stay longer than the average leisure tourist.
- Marketing & Advertising through film and television production showcases the destination as a desirable location to visit and provides an opportunity to attract tourists. An additional benefit is the ability to extend stays by creating "themed" tours and experiences related to a Film or TV production.
- Social media around film production by cast and crew produces awareness and desirability of the location.
- TV and Film productions drive visitation by reaching new markets and expands existing promotional efforts. Benefits of TV and Film productions are like other niche markets including cultural, eco, and culinary tourism.



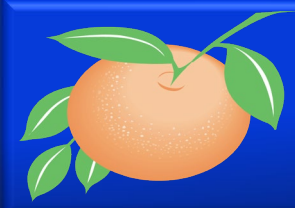
Recommendations

1. Five-year approach to revitalize the film industry in Orange County to enhance tourism by leveraging the wide-reaching exposure provided by television and motion picture productions.
2. Incentive Funding
 - \$25 M commitment over five years
 - \$5 M a year beginning in 2026
3. Use Orange County General Fund for staff and Tourist Development Tax (TDT) for incentives.
4. Create an Orange County Film Incentive Administrator, paid through the general fund, to manage and administer the incentive program.
5. Collaborate with the Orlando Economic Partnership and the Orlando Film Office.



Recommendations – Operations

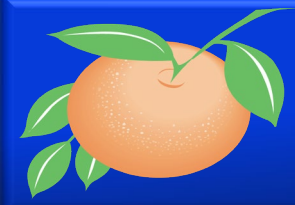
- The Orlando Economic Partnership (OEP) will continue to provide permitting and site selection assistance for the film industry and add marketing responsibilities for promoting TV and Film production for the entire region.
- Orange County will manage the film incentive program including the application, selection and payment process as well as monitoring grants for compliance in conjunction with the Orange County Comptroller.



Recommendation- Operations

Collaborative Process





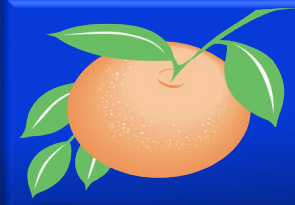
Recommendations - Incentives

TV Commercial Incentive

- The TV Commercial Incentive Program is a performance-based incentive designed to attract visitors working in high-impact television commercials to produce them in Orange County. To qualify, projects must include hotel room nights, and prominently feature, highlight, or brand Orange County and/or municipalities. Such promotional content shall include clear and recognizable depictions of Orange County's assets.

TV and Film Incentive

- The TV and Film Incentive Program is a performance-based incentive designed to attract visitors working in the TV and film industry to produce TV and film productions in Orange County. It is also designed to promote and advertise tourism by leveraging the wide-reaching exposure provided by TV and film productions to showcase the area as a desirable destination. To qualify, projects must include hotel room nights, and prominently feature, highlight, or brand Orange County and/or municipalities. Such promotional content shall include clear and recognizable depictions of Orange County's assets.



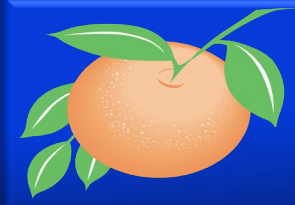
Recommendations - Incentives

TV Commercial Production Rebate

- Promotes tourism in Orange County.
- \$250,000 minimum spend in Orange County on Qualifying Payroll and Qualifying Expenditures.
- Must apply prior to principal photography.
- 10% rebate capped at \$50,000 per Production Project.
- Must include hotel nights.
- Must demonstrate best efforts to hire local cast and crew. Only Orange County residents will count towards qualifying expenditures.
- Political commercials are excluded from eligibility.
- If the awardee sets up production offices and/or soundstages, it must be based in Orange County.
- Marketing materials must be sent prior to the release of the Production Project to the Orange County Film Incentive Administration for social media, website and other marketing efforts.
- On-set visits from Orange County or other government officials.

OTHER PROGRAM NOTES:

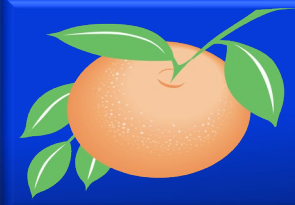
- Up to 50% of the rebate will be paid upon completion of project, submission of required documentation including proof of expenditures in Orange County, and marketing deliverables.
- The balance will be paid upon airing the commercial.



Recommendations - Incentives

Film and Television Production Rebate

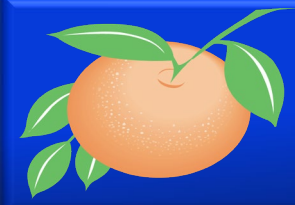
- Promotes tourism in Orange County.
- \$400,000 minimum expenditure in Orange County on Qualifying Payroll and Qualifying Expenditures (actual hotel rooms, local spend on labor, catering, wardrobe, equipment, etc.).
- 20% rebate capped at \$1 million per Production Project.
- Must include hotel nights.
- Recognition of Orange County and municipal locations in the credits and scripts/visuals if you are using Orange County or municipalities in the story.
- Creation of social media, videos and Marketing Materials- showcasing local locations, testimonials by talent about ease of working here, marketing materials and videos.
- Must demonstrate best efforts to utilize local workforce. Only Orange County residents will count towards qualifying expenditures.
- Hire five Qualified Students or Qualified Graduates from film related programs in Orange County (college, university or technical school). Must provide documentation showing proof of the Qualified Student or Qualified Graduate. Only Orange County graduates will count towards qualifying expenditures.
- OTHER PROGRAM NOTES:
 - Up to 50% of the rebate will be paid upon completion of project, submission of required documentation including proof of expenditures in Orange County, and marketing deliverables.
 - The balance will be paid after proof of distribution or holding a local screening.



Recommendations - Incentives

Projects Excluded from Incentives:

- The following projects are not eligible to apply for the Film & TV Program: live events and unscripted entertainment; political programs; documentaries; programs that solicit funds; political advertising; gambling related project productions; local, regional, or Internet-distributed-only news or current-events shows; advertising for internet sales; pornographic productions; or any production deemed obscene under Chapter 847, Florida Statutes.
- Any organization already receiving grant funds from Orange County.



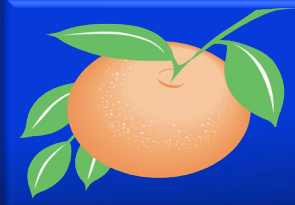
Recommendation- Selection Criteria

Commitment to promoting Orange County- the application that will effectively promote the unique assets of Orange County and enhance its image both nationally and internationally. Weighted 50%

Anticipated return on investment- the number of room nights in Orange County. Extra points will be given for utilizing the local workforce. Weighted 30%

Experience and/or ability to execute proposed project- the application that provides evidence of secured funding and relevant experience to successfully execute the proposed TV or Film project. Weighted 20%

Applications will only be considered when all sections and required documentation are complete.



Recommendation-Selection Criteria

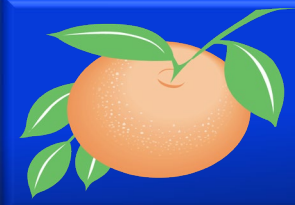
▪ TV Commercial, and TV and Film Incentive

Scoring each item on application on Scale of 1-5 points

- Orange County locations included by name/visual in script
- Estimated Orange County spend
- Orange County Hotel room nights used
- Does project showcase Orange County as a destination (for trade or recreation)?
- Relevant experience of production team to successfully execute the proposed TV Commercial project
- Evidence of secured funding
- References

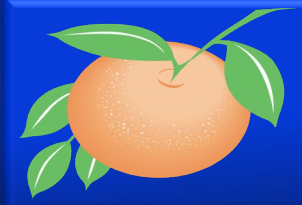
Bonus Points

- Estimated Orange County hires



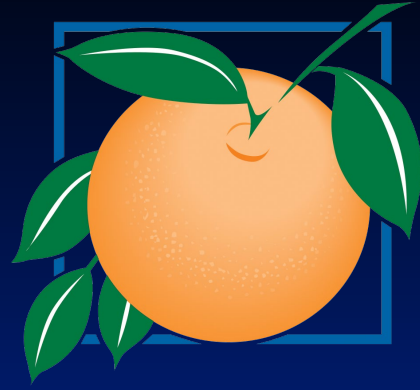
Timeline for Launch of the Program

Tourist Development Council Approval	September 26, 2025
Orange County Board of County Commissioners Approval	November 18, 2025
Post Film Incentive Administrator Position	November 2025
Application Period Open	January 1 – 31, 2026
First Grants Approved	Second quarter of 2026



Requested Actions:

- **TDC recommendation to the Board of County Commissioners to approve the updated Tourist Development Plan ordinance to provide funding for a film incentive program as the twelfth priority in the amount of five million dollars (\$5,000,000) per year for each of the fiscal years 2026 through and including fiscal year 2030.**



Questions?