

Executive Subcommittee Meeting

Monday, August 6, 2018

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AGENDA

**South Carolina
House of Representatives**



Legislative Oversight Committee

EXECUTIVE SUBCOMMITTEE

Chairman Gary E. Clary

The Honorable Laurie Slade Funderburk

The Honorable Wm. Weston J. Newton

The Honorable Robert Q. Williams

Monday, August 6, 2018

11:00 am

Room 321, Blatt Building

Pursuant to Committee Rule 6.8, S.C. ETV shall be allowed access for internet streaming whenever technologically feasible.

AGENDA

- I. Approval of Meeting Minutes**
- II. Discussion of the study of the Department of Parks, Recreation, and Tourism**
- III. Adjournment**

MEETING MINUTES

Chair Wm. Weston J. Newton

First Vice-Chair:
Laurie Slade Funderburk

Legislative Oversight Committee



Katherine E. (Katie) Arrington
William K. (Bill) Bowers
Neal A. Collins
MaryGail K. Douglas
William M. (Bill) Hixon
Jeffrey E. (Jeff) Johnson
Robert L. Ridgeway, III
Bill Taylor
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South Carolina House of Representatives

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Research Director

Cathy A. Greer
Administration Coordinator

Charles L. Appleby IV
Legal Counsel

Carmen J. McCutcheon Simon
Research Analyst/Auditor

Kendra H. Wilkerson
Fiscal/Research Analyst

Post Office Box 11867
Columbia, South Carolina 29211
Telephone: (803) 212-6810 • Fax: (803) 212-6811
Room 228 Blatt Building

Executive Subcommittee

Monday, July 9, 2018
11:00 a.m.
Blatt Room 321

Archived Video Available

- I. Pursuant to House Legislative Oversight Committee Rule 6.8, South Carolina ETV was allowed access for streaming the meeting. You may access an archived video of this meeting by visiting the South Carolina General Assembly's website (<http://www.scstatehouse.gov>) and clicking on *Committee Postings and Reports*, then under *House Standing Committees* click on *Legislative Oversight*. Then, click on *Video Archives* for a listing of archived videos for the Committee.

Attendance

- I. Subcommittee Chairman Gary E. Clary calls the Executive Subcommittee meeting to order on Monday, July 9, 2018, in Room 321 of the Blatt Building. The following members of the Subcommittee are present during all or part of the meeting: Subcommittee Chairman Clary, Representative Wm. Weston J. Newton, and Representative Robert Q. Williams.

Minutes

- I. House Rule 4.5 requires standing committees to prepare and make available to the public the minutes of committee meetings, but the minutes do not have to be verbatim accounts of meetings. It is the practice of the Legislative Oversight Committee to provide minutes for its subcommittee meetings.
- II. Representative Newton moves to approve the minutes from the prior Subcommittee meeting. A roll call vote is held, and the motion passes.

Rep. Newton moves to approve the minutes from the Subcommittee's May 8, 2018 meeting:	Yea	Nay	Not Voting (Absent)	Not Voting (Present)
Rep. Clary	✓			
Rep. Funderburk			✓	
Rep. Newton	✓			
Rep. Williams	✓			

Discussion of the Department of Parks, Recreation, and Tourism

- I. Subcommittee Chairman Clary explains the purpose of today's meeting is for the Department of Parks, Recreation, and Tourism (SCPRT) to complete its presentation on the State Park Service division and provide its presentation on the Communications division.
- II. Subcommittee Chairman Clary explains that all testimony given to this subcommittee, which is an investigating committee, must be under oath. Subcommittee Chairman Clary reminds those previously sworn in that they remain under oath and swears in Ms. Dawn Dawson-House, Director of Corporate Communications.
- III. Mr. Phil Gaines, Director of the State Park Service, continues presenting details about the agency's State Park Service division. Members ask questions, which Mr. Gaines answers.
- IV. Ms. Dawn Dawson-House, Director of Corporate Communications, presents details about the agency's Communications division. Members ask questions, which Ms. Dawson-House answers.
- V. Throughout the meeting, members make motions that are listed on the next pages.

Rep. Newton moves that the Subcommittee study include a recommendation that the General Assembly direct SCPRT how to disburse the funds for the War Between the States Heritage Preserve Commission, as there is no Commission to fulfill this duty. Additionally, the General Assembly repeal the statutes applicable to the War Between the States Heritage Preserve based on agency testimony that the commission does not currently exist.	Yea	Nay	Not Voting (Absent)	Not Voting (Present)
Rep. Clary	✓			
Rep. Funderburk			✓	
Rep. Newton	✓			
Rep. Williams	✓			

Rep. Newton moves that the Subcommittee study include a recommendation that the agency research (1) the cost to create, and annual costs to maintain and keep updated, virtual tours of each state park and historic location to post on the agency website; (2) performance measures, if any, that may be positively impacted and estimated impact considering state park revenue, if any; (3) additional ways footage may be utilize to market the state domestically and internationally; and (4) potential dollar return on investment from creation and maintenance of the videos.	Yea	Nay	Not Voting (Absent)	Not Voting (Present)
Rep. Clary	✓			
Rep. Funderburk			✓	
Rep. Newton	✓			
Rep. Williams	✓			

VI. There being no further business, the meeting is adjourned.

STUDY TIMELINE

The House Legislative Oversight Committee's (Committee) process for studying the Department of Parks, Recreation, and Tourism (agency, Department, or SCPRT) includes actions by the full Committee; Executive Subcommittee (Subcommittee); the agency; and the public. Key dates and actions are listed below.

Legislative Oversight Committee Actions

- December 19, 2017 - Prioritizes the agency for study
- January 12, 2018 - Provides the agency notice about the oversight process
- January 23 - March 1, 2018 - Solicits input about the agency in the form of an online public survey
- March 1, 2018 - Holds **Meeting #1** to obtain public input about the agency

Executive Subcommittee Actions

- May 8, 2018 - Holds **Meeting #2** to discuss the agency's history; legal directives; mission; vision; general information about finances and employees; agency organization; and the state park service organizational unit
- July 9, 2018 - Holds **Meeting #3** to continue discussing the state park service organizational unit and to discuss the communications organizational unit
- August 6, 2018 - (TODAY) Holds **Meeting #4** to discuss the agency's film commission organizational unit

Department of Parks, Recreation, and Tourism Actions

- February 27, 2015 - Submits its **Annual Restructuring and Seven-Year Plan Report**
- January 12, 2016 - Submits its **2016 Annual Restructuring Report**
- September 2016 - Submits its **2015-16 Accountability Report**
- September 2017 - Submits its **2016-17 Accountability Report**
- March 9, 2018 - Submits its **Program Evaluation Report**

Public's Actions

- January 23 - March 1, 2018 - Provides input about the agency via an **online public survey**
- Ongoing - Submits written comments on the Committee's webpage on the General Assembly's website (www.scstatehouse.gov)

Figure 1. Key dates in the study process.

AGENCY SNAPSHOT

Department of Parks, Recreation, and Tourism

Major Agency Organizational Units

Tourism Sales and Marketing

Implements agency policy and programs related to the development of S.C.'s domestic and international tourism marketing, sales, and grant programs. Provides details about attractions, accommodations and restaurants, plus contact information for S.C.'s tourism regions to group tour operators and consumers.

Welcome Centers – Facilities Maintenance

Performs facilities maintenance for the state's nine welcome centers (Welcome center customer service is under the tourism sales and marketing organizational unit).

Research

Tracks economic and other performance measures for both the state's tourism industry and other programs within the agency.

Office of Recreation, Grants, and Policy

Administers eight tourism or recreation grant programs and agency policy.

Executive Office

Manages the agency and performs duties related to director's office and human resources.

State Park Service

Manages and protects more than 80,000 acres of S.C.'s natural and cultural resources, which includes 47 operational parks and eight historic properties.

Communications

Communicates between the agency, news media, and key stakeholders and partners statewide.

Film Commission

Recruits film and television projects. Supports the development of the state's film industry through grant programs and educational workshops.

Administration

Manages finance and technology services for the agency.

FY 17-18 Resources

Employees

Available FTE: 400
Filled FTE: 400

Funding
\$172.5 million
appropriated and
authorized

CHALLENGES

As identified by the agency

- Addressing impacts to revenue and physical damages from recent hurricanes.
- Handling large-scale projects needed to address state parks deferred maintenance issues in light of the financial requirements of many of the projects outweigh the gains in revenue.
- Planning for the loss of over 20 employees as a result of the temporary employee retirement initiative (TERI) ending by the start of fiscal year 2018-19.

SUCCESSES

As identified by the agency

- Experiencing consecutive statewide tourism growth over the past five years.
- Increasing statewide marketing strategy (i.e., Undiscovered S.C. Marketing) to focus more attention on the state's developing and rural travel destinations.
- Implementing new business practices and enhancing state parks marketing to increase state parks revenue and improve operational self-sufficiency.
- Improving state welcome centers by addressing landscaping needs and identifying opportunities for technology enhancements inside the centers.

Figure 2. Snapshot of the agency's major organizational units, fiscal year 2017-18 resources (employees and funding), successes, and challenges.¹

MAP OF STATE PARKS

The map below shows the locations of the South Carolina State Parks as of April 2018. The parks are maintained by the South Carolina Department of Parks, Recreation, and Tourism. There are 47 parks. For additional details go to <https://southcarolinaparks.com/park-finder> and download the Quick Reference Guide at the bottom of the page.

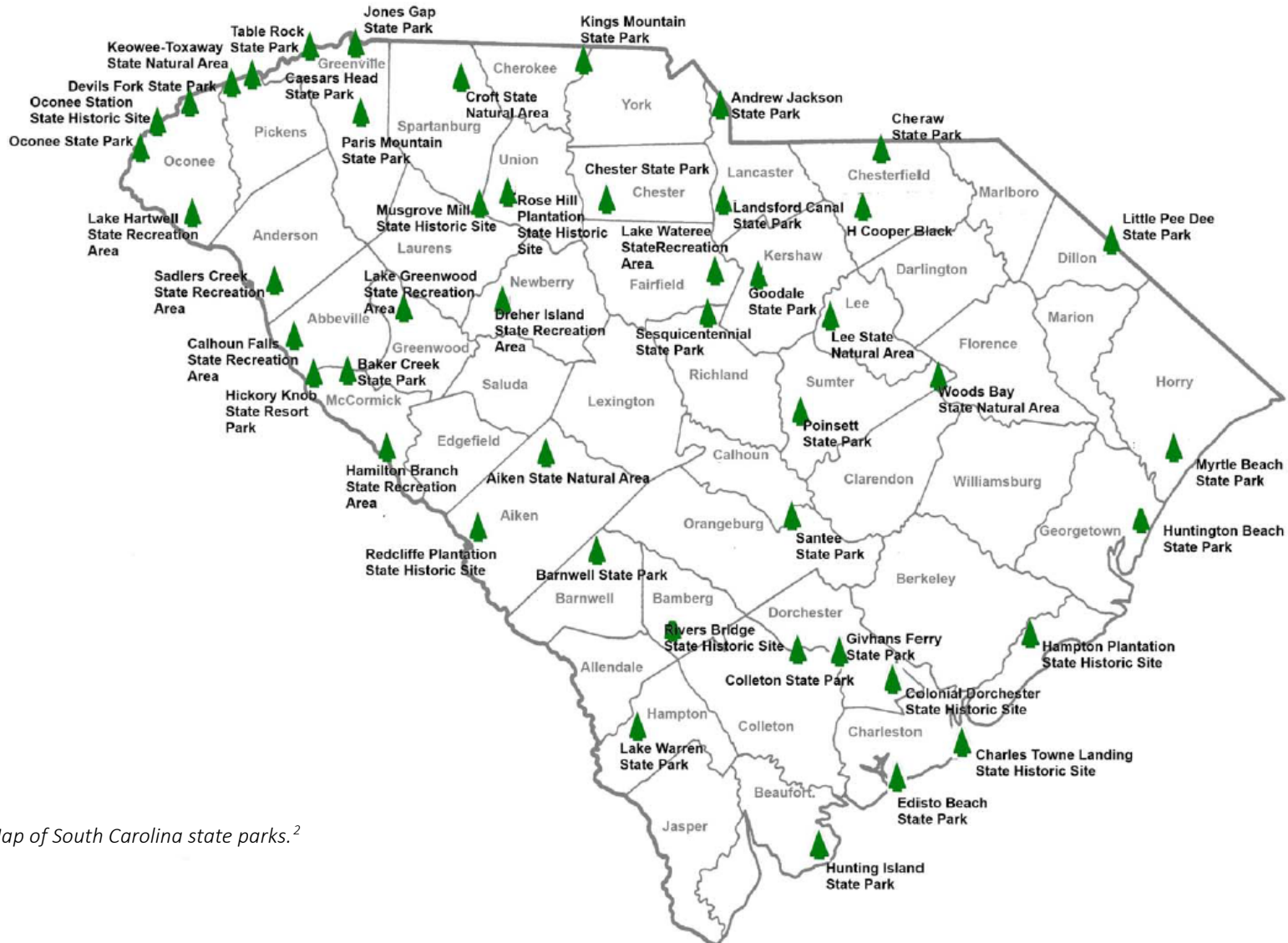


Figure 3. Map of South Carolina state parks.²

MAP OF WELCOME CENTERS

The map below shows the locations of the South Carolina Welcome Centers as of April 2018. The welcome centers are maintained by the South Carolina Department of Parks, Recreation, and Tourism. The nine welcome centers include:

	<u>Upstate</u>		<u>Midlands and Coast</u>
• Fair Play	I-85 North between SC and Georgia	• North Augusta	I-20 East between SC and Georgia
• Landrum^	I-26 East between SC and NC	• Santee	I-95 South near the center of SC
• Blacksburg	I-85 South between SC and NC	• Dillon	I-95 South between SC and NC
• Fort Mill*	I-77 South between SC and NC	• Little River	US Hwy 17 South between SC and NC
		• Hardeeville*	I-95 North between SC and Georgia

*Complete renovation to center's exterior and interior, including technology enhancements for travel assistance, as of 2017.

^Renovation to center's interior, including technology enhancements for travel assistance, only.

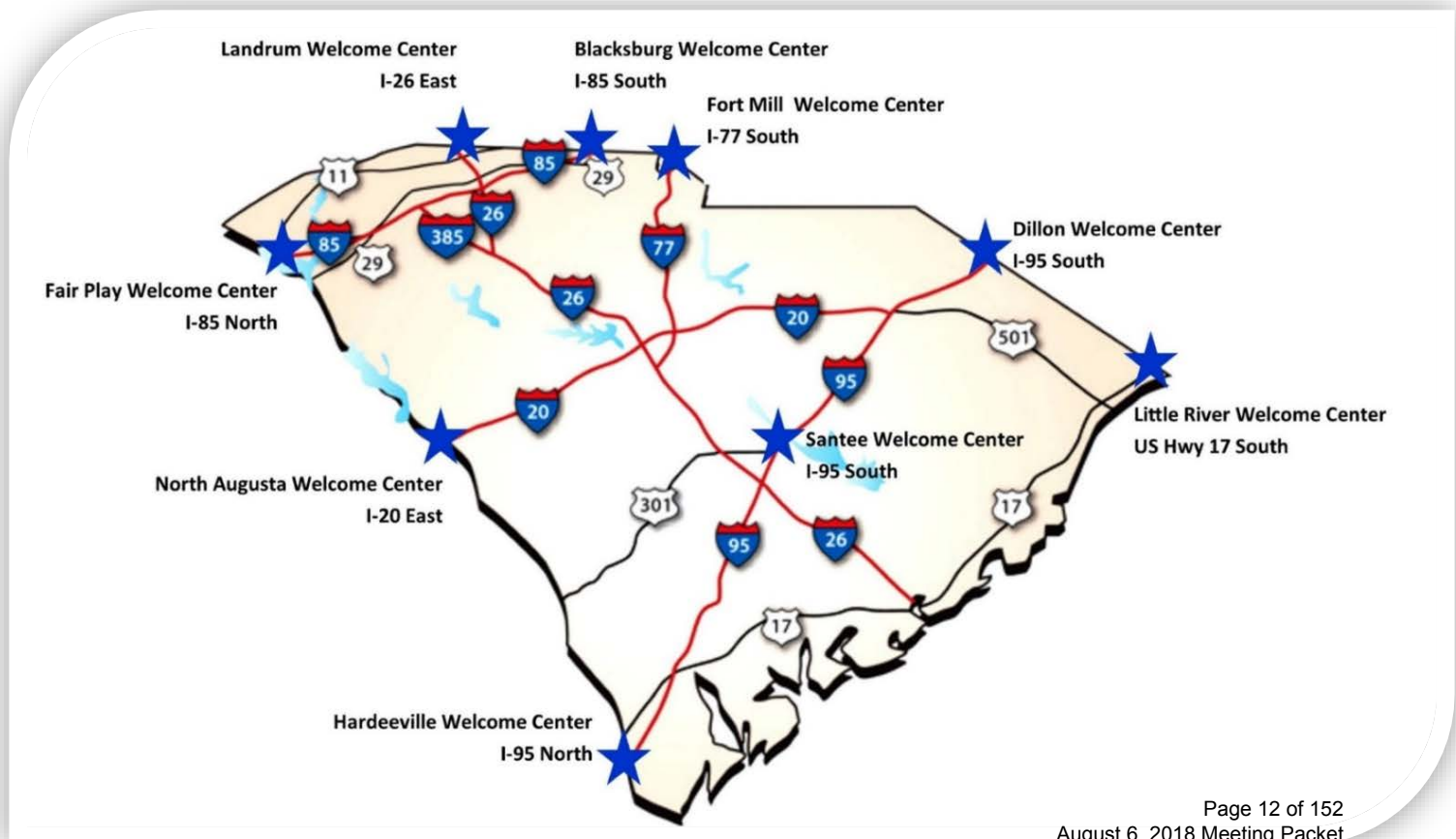


Figure 4. Map of S.C. welcome centers.³

OVERVIEW OF AGENCY - RECAP

Legal Directives

The General Assembly created SCPRT.⁴ While the agency is authorized to make and adopt regulations, none may affect hunting and fishing except as provided in S.C. Code Ann. Section 51-3-145 (certain acts unlawful at state parks). Table 1 summarizes the general duties and responsibilities the General Assembly set for SCPRT.

Table 1. Legal duties and responsibilities of SCPRT.

Legal Duties and Responsibilities of SCPRT <i>The department shall have the following duties and responsibilities in addition to such other functions as may, from time to time, be assigned by legislative action or by the State Budget and Control Board:</i>	
<u>Subject Matter</u>	<u>Duty</u>
S.C.'s tourist attractions	<ul style="list-style-type: none"> Promote, publicize, and advertise⁵
Recreational areas, including existing state park system	<ul style="list-style-type: none"> Develop and expand new and existing ones to promote the general health and welfare of the people of S.C.⁶ Allocate funds made available to it for development and improvement of park properties in the state system and historic sites approved by the agency director and director of the South Carolina Archives and History Commission⁷
Lands under agency's control	<ul style="list-style-type: none"> Borrow money for construction, development, and/or maintenance of it⁸ Enter contracts with the U.S. government for any purpose which will assist the agency in utilizing it⁹ Lease or convey portions of it to municipalities and other political subdivisions charged with the responsibility of providing parks and recreation facilities¹⁰
Lands not under agency's control	<ul style="list-style-type: none"> Borrow money to acquire it¹¹ Enter contracts with the U.S. government to acquire it¹²
Natural facilities such as mountains and coastal plains of S.C. (both those owned and not owned by the agency)	<ul style="list-style-type: none"> Develop a coordinated plan to... <ul style="list-style-type: none"> attract many visitors in all seasons to take advantage of the natural scenery, the outdoor sports, including hunting, fishing and swimming, together with other recreational activities such as golfing, boating and sightseeing¹³ preserve and perpetuate S.C.'s rich historical heritage by acquiring and owning, recognizing, marking and publicizing areas, sites, buildings and other landmarks and items of national and statewide historical interest and significance to the history of S.C.¹⁴
Timber and game	<ul style="list-style-type: none"> Manage timber and game with the available services of other agencies, provided, that the State Forestry Commission shall continue the forestry program authorized under the provisions of Section 48-23-270.¹⁵
Current and potential future resources	<ul style="list-style-type: none"> Study and provide report <ul style="list-style-type: none"> Ascertain the state's present park, parkway and outdoor recreational resources and facilities, the need for such resources and facilities, and the extent to which these needs are now being met.¹⁶

Mission and Vision

The agency provides S.C. Code Ann. 51-1-60, as the basis for its mission and vision.

SCPRT's **mission** is to “grow South Carolina’s economy by fostering sustainable tourism economic development and effectively marketing our state to increase visitation and improve the quality of life for all South Carolinians.”¹⁷

SCPRT's **vision** is to

- Grow the state (the economy, jobs, the product base, etc.);
- Enhance the authentic experiences (remain true to what makes South Carolina special);
- Sustain the resources (protect and preserve.); and
- Lead the way.¹⁸

Organizational Chart

Figure 4 includes an organizational chart, current as of March, 2018.

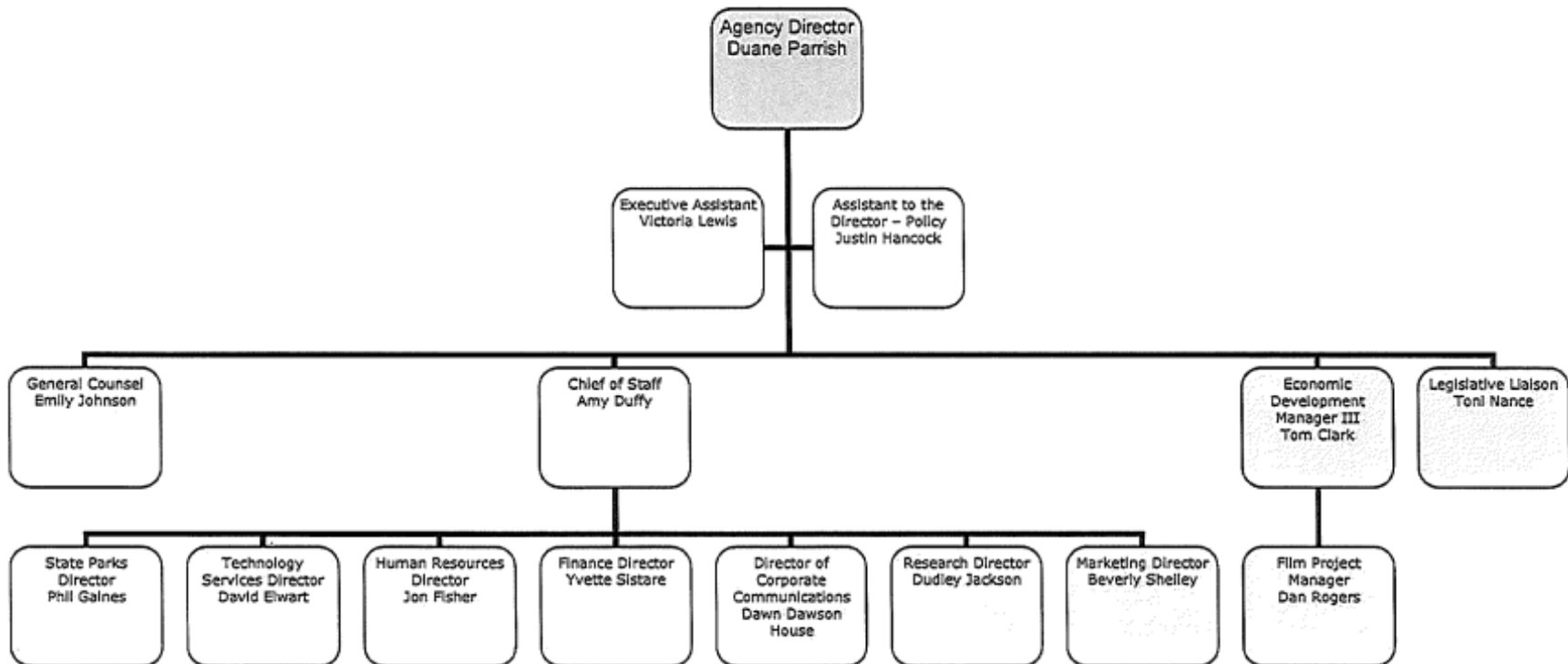


Figure 5. SCPRT Organizational chart as of March 2018.¹⁹

FILM COMMISSION

Overview of the Film Commission

The film commission is responsible for recruiting film and television projects and supporting the development of the state's film industry through grant programs and educational workshops.

Employee Information related to the Film Commission

In the Program Evaluation Report, the Committee asks the agency to provide information about the employees in each of the agency's organizational units. Table 2 includes the information provided by the agency.

Table 2. Film commission organizational unit's employee information.

<u>Details</u>	<u>2014-15</u>	<u>2015-16</u>	<u>2016-17</u>
What is the turnover rate?	0.00%	40.00%	0.00%
Is employee satisfaction evaluated?	×	×	×
Is anonymous employee feedback allowed?	×	×	×
Do any positions require a certification (e.g., teaching, medical, accounting, etc.)	×	×	×
Did the agency pay for, or provide classes/instruction needed to maintain all, some, or none of required certifications?	N/A	N/A	N/A

Revenue and Funding Sources of the Film Commission

Generated by the Film Commission

In the Program Evaluation Report, the Committee asks the agency to provide information about its revenue sources. The film commission did not generate any revenue during fiscal years 2015-16 or 2016-17.

Utilized by the Film Commission

Table 3 includes information on funding sources utilized by the film commission.

Table 3. Agency funding sources utilized by the film commission to achieve the agency's comprehensive strategic plan in FY 2016-17 and 2017-18.²⁰

Revenue Sources utilized	Recurring or one-time?	State, Federal, or Other?	Spent to achieve plan in 2016-17	Percent of total agency spent	Budgeted to achieve plan in 2017-18	Percent of total agency spent
Motion Picture Incentive Act	Recurring	Other	\$11,942,641	8.88%	\$16,173,498	11.50%
Total utilized by the Film Commission:			\$11,942,641	8.88%	\$16,173,498	11.50%

Strategic Plan and Resource Allocation related to the Film Commission

In the Program Evaluation Report (PER), the Committee asks an agency the intended public benefit of each aspect of its strategic plan and how it allocates its human and financial resources to accomplish its goals (i.e., broad expression of a long-term priority) and objectives (i.e., specific, measurable and achievable description of an effort the agency is implementing to achieve a goal).²¹ The Committee also asks the agency to list any funds the agency spent or transferred not toward the agency's comprehensive strategic plan. All revenue sources associated with the film commission organizational unit were spent toward the agency's comprehensive strategic plan.

Tables 4.1 - 4.2 provide information on the amount of funding and number of employees utilized to accomplish the portions of the strategic plan associated with the film commissions.

Table 4.1. Part of agency's strategic plan related to the film commission, Objective 2.1.1: Recruit film/television projects that provide positive impacts on S.C.'s economy and employment.

GOAL 2 Encourage business development and economic growth

Strategy 2.1 Develop the state's film industry through project recruitment and educational opportunities

Objective 2.1.1 Recruit film/television projects that provide positive impacts on S.C.'s economy and employment

Responsible Employee(s): Mr. Dan Rogers (responsible for 30 years)

Employee have input in budget? Yes, Mr. Rogers has input into the budget for Objective 2.1.1

External Partner(s): None

	# of FTE equivalents utilized	Amount Spent (including employee salaries/wages and benefits)	% of Total Available to Spend
2016-17	1.75	\$11,760,575	6.00%
2017-18	1.75	\$15,933,498	9.24%

Intended Public Benefit/Outcome

Provided employment for S.C.-based film crews, spending with S.C.-based supplier companies and generate greater hotel occupancy for S.C. hotels

Table 4.2. Part of agency's strategic plan related to the film commission, Objective 2.1.2: Encourage workforce development through educational workshops and production fund grants.

GOAL 2 Encourage business development and economic growth

Strategy 2.1 Develop the state's film industry through project recruitment and educational opportunities

Objective 2.1.2 Encourage workforce development through educational workshops and production fund grants

Responsible Employee(s): Mr. Tom Clark (responsible for 11 years)

Employee have input in budget? Yes, Mr. Clark has input into the budget for Objective 2.1.2

External Partner(s): Higher education institutions and K-12 education institutions

	# of FTE equivalents utilized	Amount Spent (including employee salaries/wages and benefits)	% of Total Available to Spend
2016-17	0.25	\$182,068	0.09%
2017-18	0.25	\$240,000	0.14%

Intended Public Benefit/Outcome

Provide students exposure to potential careers in the film industry

Products, Services, Customers and Performance of the Film Commission

In the Program Evaluation Report (PER), the Committee asks an agency **to provide a list of its deliverables** (i.e., products and services) as well as additional information related to laws, customers, costs, and potential negatives impacts. The information provided by the agency, applicable to this organizational unit, is provided on the next pages.

Additionally the PER asks the agency to provide its performance measures. The agency was asked to categorize each measure based on the definitions below.²² After each product or service, is a chart with information on the measures, if any, the agency uses to gauge its performance in providing the product or service.²³

Types of Performance Measures:

Outcome Measure - A quantifiable indicator of the public and customer benefits from an agency's actions. Outcome measures are used to assess an agency's effectiveness in serving its key customers and in achieving its mission, goals and objectives. They are also used to direct resources to strategies with the greatest effect on the most valued outcomes. Outcome measures should be the first priority. Example - % of licensees with no violations.

Efficiency Measure - A quantifiable indicator of productivity expressed in unit costs, units of time, or other ratio-based units. Efficiency measures are used to assess the cost-efficiency, productivity, and timeliness of agency operations. Efficiency measures measure the efficient use of available resources and should be the second priority. Example - cost per inspection

Output Measure - A quantifiable indicator of the number of goods or services an agency produces. Output measures are used to assess workload and the agency's efforts to address demands. Output measures measure workload and efforts and should be the third priority. Example - # of business license applications processed.

Input/Activity Measure - Resources that contribute to the production and delivery of a service. Inputs are "what we use to do the work." They measure the factors or requests received that explain performance (i.e. explanatory). These measures should be the last priority. Example - # of license applications received.

Table 5 includes an overview of the deliverables provided by the film commission and Tables 6.1 - 8.2 include additional information about each of the deliverables. If the details of a deliverable were previously provided during the agency's presentation of one of its other organizational units, the details are not repeated in this packet.

Table 5. List of the film commission's deliverables.

Item # ¹	Deliverable	Does law require, allow, or not address it?
54A	Administer motion picture incentive program: Sales and use tax exemption	Allowed by S.C. Code Ann. Section 12-62-40. Certificate of Exemption
54B	Administer motion picture incentive program: Wage and supplier rebates	Allowed by S.C. Code Ann. Section 12-62-50. Tax rebate for employment of persons subject to South Carolina income tax withholdings.
54C	Administer motion picture incentive program: Product fund grants	Allowed by S.C. Code Ann. Section 12-62-60. Distribution of admissions taxes; rebates to motion picture production companies; promotion of collaborative efforts between institutions of higher learning and motion picture related entities.
54D	Administer motion picture incentive program: Low rates for temporary use of state property	Allowed by S.C. Code Ann. Section 12-62-70. Temporary use of underutilized state property by motion picture production company; use of state property for less than seven days.

¹ Item numbers are the ones utilized in agency's program evaluation report.

Item # ¹	Deliverable	Does law require, allow, or not address it?
55	Promote collaborative production and educational efforts between S.C. institutions of higher learning and motion picture related entities	Required by S.C. Code Ann. Section 12-62-60(D). Distribution of admissions taxes; rebates to motion picture production companies; promotion of collaborative efforts between institutions of higher learning and motion picture related entities.
56	Provide location scouting assistance to film production companies	Not specifically mentioned in law, but provided to achieve the requirements of S.C. Code Ann. Section 1-30-80(B). Effective July 1, 2008, the South Carolina Film Commission of the Department of Commerce is transferred to the Department of Parks, Recreation and Tourism and becomes a separate division of the Department of Parks, Recreation and Tourism.

Table 6.1. Additional details about Deliverable #54A: Administer motion picture incentive program – sales and use tax exemption.

Deliverable #54A²⁴

Deliverable: Administer motion picture incentive program

Components: Sales and Use Tax Exemption –

- 1) Accept, evaluate, and approve/deny applications from motion picture production companies (MPPC) which desire to be relieved from paying the state and local sales and use taxes collected by S.C. Department of Revenue (SCDOR);
- 2) Work with SCDOR and a representative from the MPPC on the MPPC's reporting of its expenditures and other information necessary to take advantage of the tax relief; and
- 3) Upon completion of the motion picture, accept a report from the MPPC of the actual expenditures made in S.C. in connection with the filming or production of the motion picture.

Greatest harm if not provided: Elimination of this exemption would limit S.C.'s ability to effectively recruit motion picture projects.

How General Assembly can help avoid harm, other than money: Allow SCDOR to issue sales and use tax exemptions to qualified motion picture projects.

Other agencies whose mission the deliverable may fit within: None

No change in law would be required to curtail or eliminate the deliverable.
Deliverable is allowed, but not specifically required, by S.C. Code Ann. Section 12-62-40. Certificate of Exemption.

Table 6.2. Additional details about Deliverable #54B: Administer motion picture incentive program – wage and supplier rebates.

Deliverable #54B²⁵

Deliverable: Administer motion picture incentive program

Components: Wage Rebates –

- 1) Create, provide, accept, evaluate, and approve/deny applications for a certificate of completion from a motion picture production company (MPPC) once filing in S.C. is complete (MPPC must have this certificate before filing for the rebate); and
- 2) Create, provide, accept, evaluate (which involves review of a report from the MMPC that outlines information about the project and all employees involved and may involve inspection of the MPPC's payroll books and records), and approve/deny the filed claim for a rebate on a portion of the S.C. payroll of the employment of persons, directly involved in the filming or post-production, subject to S.C. income tax withholdings in connection with production of the motion picture.

Greatest harm if not provided: Elimination of film incentives will drastically reduce the number of motion picture projects in S.C., eliminating jobs for instate film crew and spending with instate supplier companies. Potential film projects would very likely go to states active incentive programs, such as Georgia and North Carolina.

How General Assembly can help avoid harm, other than money: Implement new tax credits available to eligible film production companies working in S.C.

Other agencies whose mission the deliverable may fit within: None

No change in law would be required to curtail or eliminate the deliverable.
 Deliverable is allowed, but not specifically required, by S.C. Code Ann. Section 12-62-50. Tax rebate for employment of persons subject to South Carolina income tax withholdings.

Table 6.3. Additional details about Deliverable #54C: Administer motion picture incentive program – product fund grants.

Deliverable #54C²⁶

Deliverable: Administer motion picture incentive program

Components: Supplier Rebates –
Distribute part of the general funds portion of admissions tax (rebate) to motion picture production companies (MPPC) SCPRT identifies. The rebate may be up to 30% of the expenditures made by the MPPC in the state if the MPPC has a minimum in-state expenditure of one million dollars. The distribution of rebates may not exceed the amount annually funded to the agency for the S.C. Film Commission from the admissions tax collected by the state.

Greatest harm if not provided: Elimination of film incentives will drastically reduce the number of motion picture projects in S.C., eliminating jobs for instate film crew and spending with instate supplier companies. Potential film projects would very likely go to states active incentive programs, such as Georgia and North Carolina.

How General Assembly can help avoid harm, other than money: Implement new tax credits available to eligible film production companies working in S.C.

Other agencies whose mission the deliverable may fit within: None

Law change would be required to curtail or eliminate the deliverable.
Deliverable is required by S.C. Code Ann. Section 12-62-60. Distribution of admissions taxes; rebates to motion picture production companies; promotion of collaborative efforts between institutions of higher learning and motion picture related entities.

Table 6.4. Additional details about Deliverable #54D: Administer motion picture incentive program – low rates for temporary use of state property.

Deliverable #54D²⁷

Deliverable: Administer motion picture incentive program

Components: Low Rates for Temporary Use of State Property –
Provide motion picture location scouting services and negotiate below-market rates for temporary use, no more than twelve months, by motion picture production companies, of space the Department of Administration has determined to be underutilized state property.

Greatest harm if not provided: Elimination would limit motion picture recruitment efforts for some projects.

How General Assembly can help avoid harm, other than money: Encourage state and local governments to work cooperatively with motion picture production companies in the use of unused buildings or properties.

Other agencies whose mission the deliverable may fit within: None

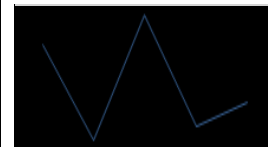
No change in law would be required to curtail or eliminate the deliverable. Deliverable is allowed, but not specifically required, by S.C. Code Ann. Section 12-62-70. Temporary use of underutilized state property by motion picture production company; use of state property for less than seven days.

Table 6.5. Data tracked and performance measure associated with Deliverable #54 (A-D): Administer motion picture incentive program.

Customers/Clients	
Does the agency evaluate....	
customer satisfaction?	No
outcome obtained?	Yes (A-C); No (D)
Does agency know the annual number of...	
potential customers?	No (A, B, D); Yes (C)
customers served?	Yes (A-C); No (D)

Costs	
Does the agency know the....	
cost it incurs, per unit?	Yes (B, C); No (A, D)
Does the law allow the agency to...	
charge to cover the agency's costs?	No (A, C-D); Yes (B)

Table Note: A = Sales and use tax exemption; B = Wage and supplier rebates; C = Product fund grants; and D = Low rates for temporary use of state property.

Specific Performance Measures Tracked								
<u>Performance Measure</u>	<u>Type of Measure</u>		<u>2012-13</u> (June - July)	<u>2013-14</u> (June - July)	<u>2014-15</u> (June - July)	<u>2015-16</u> (June - July)	<u>2016-17</u> (June - July)	<u>2017-18</u> (June - July)
S.C. Film Hires, Total Number <u>Required by:</u> State government + Agency Selected	Outcome	<u>Target:</u>	n/a*	n/a*	n/a*	n/a*	n/a*	n/a*
		<u>Actual:</u>	2,926	2,196	3,164	2,301	2,479	<u>Trend Line</u> 

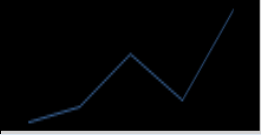

Specific Performance Measures Tracked								
Performance Measure	Type of Measure		2012-13 (June - July)	2013-14 (June - July)	2014-15 (June - July)	2015-16 (June - July)	2016-17 (June - July)	2017-18 (June - July)
Film-Related S.C. Spending (qualified spend only), Total Amount <u>Required by:</u> State government + Agency Selected	Outcome	<u>Target:</u>	n/a*	n/a*	n/a*	n/a*	n/a*	n/a*
		<u>Actual:</u>	\$15,458,855	\$18,455,460	\$29,075,355	\$19,860,414	\$38,093,948	<u>Trend Line</u> 
Film-Related Hotel Nights, Total Number <u>Required by:</u> Agency selected (not required by state or federal government)	Outcome	<u>Target:</u>	n/a*	n/a*	n/a*	n/a*	n/a*	n/a*
		<u>Actual:</u>	6,108	9,316	8,686	9,781	7,473	<u>Trend Line</u> 

Table Note: In some of the performance measures associated with the deliverables, an "n/a" may appear for target values. The agency states in the Program Evaluation Report PER that the target values are listed as "n/a" for outcome measures if external factors beyond the agency's control significantly influence the outcome of the performance measure. For example, film-related performance measure outcomes depend greatly on a number of external factors including the type of projects recruited, the financial scope of the projects, time of year, and location of the project. The agency states it cannot reasonably predict these outcomes for future fiscal years as these factors are resultant of the needs of the motion picture production companies.

Motion Picture Incentive Act - Economic Impact, Return on Investment, History

In a June 4, 2018, letter to the agency, the Subcommittee asks the agency various questions about the Motion Picture Incentive Act. The agency provides the information below in a June 27, 2018, letter to the Subcommittee.²⁸

Incentives Offered by S.C. in the Past²⁹

Below is a timeline which indicates the types of incentives S.C. has provided to recruit film and television and, for each change in incentive, the agency's understanding of the reason for the change.

- 1997 - Income Tax Credits
 - 20% credit for cash investment in a S.C. motion picture project
 - 20% credit for investment in a motion picture production or post-production facility
- 2005 - Cash Rebates
 - 15% wage rebate; 15% supplier rebate; and sales and use tax exemption
 - The income tax credits provided from 1997 to 2005 proved ineffective for recruiting motion picture projects. Wage and supplier cash rebates were established in order to make S.C. more competitive in motion picture project recruitment.
- 2006 - Cash Rebates Increase
 - 20% wage rebate; and 30% supplier rebate
 - Increase occurs via a proviso to the state budget
 - The 15% wage and supplier rebates were determined to be too low to be effective. Rebate levels increased to boost S.C.'s competitiveness.
- 2012 - Cash Rebates Decrease
 - 15% wage rebate; and 15% supplier rebate
 - The film rebate proviso was deleted after an unsuccessful attempt by the agency to have increased rebate levels codified.
- 2013 - Cash Rebates Increase and are codified
 - 20% (non-state resident) and 25% (state- resident) wage rebate; 30% supplier rebate
 - Wage and supplier cash rebate levels are codified.

Economic Impact and Return on Investment³⁰

AECOM's² **Analysis of S.C.'s Film Incentives** is the most recent economic impact study of film. It was published in December 2011, utilizing data current as of November 2011. Appendix A includes the report. It is also available on the Committee website.³¹

This economic impact study covered nine qualified film productions that occurred from 2007 through 2011. The study found, from 2007 through 2011, S.C. awarded approximately \$21 million in wage and supplier rebates, which generated \$86.9 million in sales for S.C. businesses and supported the

² Project management company

equivalency of 1,610 full-time jobs for S.C. residents. It further found the following for every \$100 spent on rebates:

- \$31 generated in taxes, a net loss as is the case with many other film incentive programs in the U.S.,
- \$410 generated in total economic output (i.e., sales at state businesses), and
- \$230 generated in wages to S.C. residents.³²

S.C. Film Commission's **Film Project Summary Reports**, include every film or television production project, both incentivized and non-incentivized, the S.C. Film Office either recruited or assisted during calendar years 2007 through 2017. Appendix B-1, B-2, and B-3 include these reports. They are also available on the Committee website. Each entry in the reports list the project title, total rebate amount, total qualified spending in S.C., total hotel room nights and total number of S.C. crew hires.

Table 6.6 includes a list of the counties in which film projects did and did not occur during this time period. Table 6.7 includes a summary of S.C. film incentives, amount invested, and return on investment.

Table 6.6. Counties in which film projects did and did not occur from 2007 to 2017.

Film project production started in 2007-2012		Film project production started in 2012	Film project production started in 2013-17		No film projects in 2007 through 2017
Aiken	Horry	Anderson	Aiken	Lee	Allendale
Abbeville	Jasper	Beaufort	Abbeville	Lexington	Barnwell
Anderson	Kershaw	Charleston	Anderson	Marion	Hampton
Bamberg	Lancaster	Darlington	Bamberg	Newberry	Marlboro
Beaufort	Laurens	Edgefield	Beaufort	Oconee	McCormick
Berkeley	Lee	Fairfield	Berkeley	Orangeburg	Saluda
Calhoun	Lexington	Florence	Charleston	Pickens	Williamsburg
Charleston	Newberry	Greenville	Cherokee	Richland	
Cherokee	Oconee	Horry	Chester	Spartanburg	
Chester	Orangeburg	Kershaw	Chesterfield	Sumter	
Clarendon	Pickens	Lee	Colleton	York	
Dillon	Richland	Lexington	Dorchester		
Dorchester	Spartanburg	Marion	Fairfield		
Edgefield	Sumter	Orangeburg	Florence		
Florence	Union	Richland	Georgetown		
Georgetown	York	Spartanburg	Greenville		
Greenville		Sumter	Horry		
Greenwood		York	Kershaw		

Table 6.7. Summary of film incentive history, amount invested, and return on investment.³³

History of Film Incentives	Investment and Return		
	<u>Wage and supplier rebates provided</u>	<u>Sales generated for S.C. Businesses and Wages generated for S.C. Residents</u>	<u>Sales and Wages generated per \$1 invested</u>
<p>20% income tax credit</p> <p><i>(Incentive applications submitted from FY 1996-97 through FY 2003-04)</i></p>	Info not requested	Info not requested	Info not requested
<p>15% Wage rebate</p> <p>15% Supplier rebate</p> <p><i>(Incentive applications submitted in FY 2004-05)</i></p>	Info not requested	Info not requested	Info not requested
<p>20% Wage rebate</p> <p>30% Supplier rebate</p> <p><i>(Incentive applications submitted from FY 2005-06 through FY 2010-11)</i></p>	\$43* million	\$143.8* million	\$3.34 for every \$1 invested
<p>15% Wage rebate</p> <p>15% Supplier rebate</p> <p><i>(Incentive applications submitted during FY 2011-12)</i></p>	\$0 <i>No incentive applications submitted</i>	\$0	\$0 invested
<p>20%-25% Wage rebate</p> <p>30% Supplier rebate</p> <p><i>(Incentive applications submitted from FY 2012-13 through the present)</i></p>	\$57.8 million	\$120.7 million	\$2.09 for every \$1 invested

Table Note: The wage and supplier rebate percentage applicable is determined when the production submits its application to receive incentives, but SCPRT does not count the total rebates and sales/wages generated until the production closes. The asterisk (*) indicates \$8.9 million of the total wage and supplier rebates and \$22.7 million of the total sales and wages generated was from Army Wives - Season 6. It is reported in the SC Film Project Summary Report (2012), when the production closed, but included in the group of productions that received 20% wage rebate and 30% supplier rebate because the show applied for the incentives in 2010-11.

Strategic Marketing and Research, Inc. (SMARI) 2013 Film Impact Qualitative and Quantitative Research report was the result of a research study to determine the impact of film on travel. SMARI is SCPRT's contracted research vendor. Appendix C includes the report. It is also available on the Committee website.³⁴

The key findings of the study were as follows:

- Three increasingly conservative quantitative research efforts and four focus groups have revealed that television and film productions undoubtedly influence leisure travel.
- The most recent and most conservative estimate of incremental travel attributable to the selected S.C. productions is 7.8%. This suggests that the productions may have influenced 1.6 million household visits to S.C. and approximately \$1.7 billion in travel revenue during 2003 to 2013.
- The productions that are most likely to influence travel include TV shows about travel or food, romance/drama movies or TV shows, and sitcoms.
- The specific production attributes that are most likely to be a major influence on travel include coastal scenery, natural scenery, relaxation, historical sites, and iconic locations/landmarks.³⁵

Incentive Options Offered by Other States³⁶

U.S. Production Incentives At-A-Glance, is the most recent summary report of film incentives offered by other states in the U.S., which the S.C. Film Office regularly tracks. Appendix D includes the report. It is also available on the Committee's webpage.³⁷ As indicated in this document, there are many states that - like S.C. - offer rebate or grant incentives. Funding levels for states offering rebates or grants vary from \$750,000 per year (Colorado) to \$34 million (North Carolina).

Tax credit film incentives, offered by some states (e.g., Georgia, New York, and California) have much higher funding caps or, in some cases, no funding cap. In general, SCPRT believes cash rebates seem to be the preferred type of incentive for many motion picture production companies. Like many other states, the challenge S.C. faces with cash rebate incentives is the relatively low funding levels compared to states that offer tax credit incentives. However, unlike states that offer transferable tax credits, S.C. can easily track the state's investment in film incentives each year. In other words, with cash rebates, (1) the state knows exactly how much film incentives cost, and (2) when those costs are paid.

Although SCPRT has not conducted a formal analysis of alternative incentive options, the agency regularly monitors the changes in other state's film incentive programs and the impacts those changes have on that state's film industry. In general, SCPRT believes the perceived stability of a state's film incentive program can be a significant factor for motion picture production companies during the site selection process. As has occurred in New Mexico, Michigan, Louisiana, and North Carolina, any actual or perceived instability of a film incentive program can have an immediate negative impact on a state's film recruitment efforts. Thus, any potential increases to S.C.'s film rebate percentages or funding levels must be sustainable in both the long and short-term.

Table 7.1. Additional details about Deliverable #55: Promote collaborative production and educational efforts between S.C. institutions of higher learning and motion picture related entities.

Deliverable #55³⁸

Deliverable: Promote collaborative production and educational efforts between S.C. institutions of higher learning and motion picture related entities

Components: 1) Conduct film educational workshops; and
2) Production Fund Grants

Greatest harm if not provided: Elimination of this program would limit the development of S.C.'s resident film crews, making them less competitive than film crews from neighboring states.

How General Assembly can help avoid harm, other than money: Provide professional development courses through the public education system, S.C. Technical College System, or institutions of higher education.

Other agencies whose mission the deliverable may fit within: Higher education institutions; and S.C. Technical College System

Law change would be required to curtail or eliminate the deliverable.
Deliverable is required by S.C. Code Ann. Section 12-62-60(D). Distribution of admissions taxes;
rebates to motion picture production companies; promotion of collaborative efforts
between institutions of higher learning and motion picture related entities.

Table 7.2. Data tracked and performance measure associated with Deliverable #55: Promote collaborative production and educational efforts between S.C. institutions of higher learning and motion picture related entities.

Customers/Clients	
Does the agency evaluate....	
customer satisfaction?	Yes
outcome obtained?	No
Does agency know the annual number of...	
potential customers?	No
customers served?	Yes

Costs	
Does the agency know the....	
cost it incurs, per unit?	Yes
Does the law allow the agency to...	
charge to cover the agency's costs?	No

Specific Performance Measures Tracked: None

Table 8.1. Additional details about Deliverable #56: Provide location scouting assistance to film production companies.

Deliverable #56³⁹

Deliverable: Provide location scouting assistance to film production companies

Components: The S.C. Film Office provides location scouting assistance to...

- 1) recruit potential film projects to the state; and
- 2) assist active film projects with specific location needs.

Greatest harm if not provided: Elimination would limit motion picture recruitment efforts for some projects.

How General Assembly can help avoid harm, other than money: Encourage state and local governments to work cooperatively with motion picture production companies in the use of unused buildings or properties.

Other agencies whose mission the deliverable may fit within: None

No change in law would be required to curtail or eliminate the deliverable.

Deliverable is not specifically mentioned in law, but provided to achieve the requirements of S.C. Code Ann. 1-30-80(B). Effective July 1, 2008, the S.C. Film Commission of the Department of Commerce is transferred to the Department of Parks, Recreation and Tourism and becomes a separate division of the Department of Parks, Recreation and Tourism.

Table 8.2. Data tracked and performance measure associated with Deliverable #56: Provide location scouting assistance to film production companies.

Customers/Clients	
Does the agency evaluate....	
customer satisfaction?	Yes
outcome obtained?	Yes
Does agency know the annual number of...	
potential customers?	No
customers served?	Yes

Costs	
Does the agency know the....	
cost it incurs, per unit?	No
Does the law allow the agency to...	
charge to cover the agency's costs?	No

Specific Performance Measures Tracked: None

Agency Recommendations - Film Commission

In the Program Evaluation Report, the Committee asks the agency to provide a list of recommendations related to internal changes and changes in laws, which may improve the agency's efficiency and effectiveness, or update antiquated laws. The agency's recommendations, which are listed below, relate to the agency's film commission organizational unit. Note, the law change recommendation number is the number utilized in the agency's Program Evaluation Report.

Law Changes

Law Change Recommendation #7 - S.C. Code Ann. 1-30-80	
Law	S.C. Code Ann. 1-30-80. Department of Parks, Recreation and Tourism
Summary of Current Law	SCPRT designated as a Department within the Executive Branch of State Government. Film Office transferred to SCPRT
Recommendation & Rationale	Modify Film Commission Objectives to align with deliverables and public benefit.
Law Recommendation Number	7
Agency's Recommended Language	<p>Section 1-30-80. Department of Parks, Recreation and Tourism.</p> <p>(A) The following agencies, boards, and commissions, including all of the allied, advisory, affiliated, or related entities as well as the employees, funds, property, and all contractual rights and obligations associated with any such agency, except for those subdivisions specifically included under another department, are transferred to and incorporated in and must be administered as part of the Department of Parks, Recreation and Tourism to include a Parks, Recreation and Tourism Division.</p> <p>Department of Parks, Recreation and Tourism, formerly provided for at Sections 51-1-10, 51-3-10, 51-7-10, 51-9-10, and 51-11-10, et seq.</p> <p>(B)(1) Effective July 1, 2008, the South Carolina Film Commission of the Department of Commerce is transferred to the Department of Parks, Recreation and Tourism and becomes a separate division of the Department of Parks, Recreation and Tourism.</p> <p>(2) The South Carolina Film Commission as established in this section as a division of the Department of Parks, Recreation and Tourism and transferred to it shall ensure that funds made available to film projects through the South Carolina Film Commission are budgeted and spent so as to further the following objectives:</p> <p>(a) stimulation of economic activity to develop the potentialities of the State <u>by recruiting and facilitating motion picture production and recruiting motion picture production and support companies and facilities that further the objectives of the division's programs and standards;</u></p>

	<p>(b) conservation, restoration, and development of the natural and physical, the human and social, and the economic and productive resources of the State taking steps necessary to foster the economic and cultural development of the indigenous motion picture industry;</p> <p>(c) promotion of a system of transportation for the State, through development and expansion of the highway, railroad, port, waterway, and airport systems receiving and disbursing funds which may become available by the federal government for programs related to motion picture production and related activities;</p> <p>(d) promotion and correlation of state and local activity in planning public works projects;</p> <p>(e)(d) promotion of public interest in the development of the State through cooperation with public agencies, private enterprises, and charitable and social institutions <u>by entering contracts within the amount made available by appropriation, with individuals, organizations, and institutions for services furthering the objectives of the division's programs, and with local and regional associations for cooperative endeavors furthering the objectives of the division's programs;</u></p> <p>(f) encouragement of industrial development, private business, commercial enterprise, agricultural production, transportation, and the utilization and investment of capital within the State;</p> <p>(g) assistance in the development of existing state and interstate trade, commerce, and markets for South Carolina goods and in the removal of barriers to the industrial, commercial, and agricultural development of the State;</p> <p>(h)(e) assistance in ensuring stability in employment, increasing the opportunities for employment of the citizens of the State, devising ways and means to raise the living standards of the people of the State <u>in accordance with the objectives of the division's programs and standards;</u></p> <p>(i)(f) enhancement of the general welfare of the people; and</p> <p>(j)(g) encouragement and consideration as appropriate so as to consider race, gender, and other demographic factors to ensure nondiscrimination, inclusion, and representation of all segments of the State to the greatest extent possible.</p> <p>HISTORY: 1993 Act No. 181, Section 1; 1999 Act No. 100, Part II, Section 71; 2008 Act No. 313, Section 6.B, eff upon approval (became law without the Governor's signature on June 12, 2008); 2008 Act No. 359, Section 2, eff July 1, 2008.</p>
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Presented and Approved by Board/Commission	Has not been presented to Governor's Office
Other Agencies Potentially Impacted	None

APPENDICES

Appendix A. Analysis of S.C.'s Film Incentives (December 2011)



Economics

Analysis of South Carolina's Film Incentives

Prepared for:

**South Carolina Department of Parks, Recreation, and Tourism
December 9, 2011**

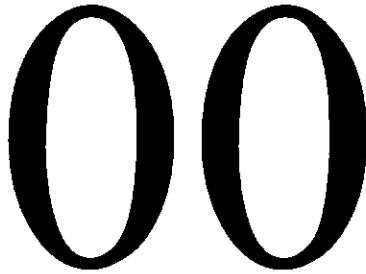


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General & Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this report are accurate as of the date of this study; however, factors exist that are outside the control of AECOM and that may affect the estimates and/or projections noted herein. This study is based on estimates, assumptions and other information developed by AECOM from its independent research effort, general knowledge of the industry, and information provided by and consultations with the client and the client's representatives. No responsibility is assumed for inaccuracies in reporting by the client, the client's agent and representatives, or any other data source used in preparing or presenting this study.

This report is based on information that was current as of November 2011 and AECOM has not undertaken any update of its research effort since such date.

Because future events and circumstances, many of which are not known as of the date of this study, may affect the estimates contained therein, no warranty or representation is made by AECOM that any of the projected values or results contained in this study will actually be achieved.

Possession of this study does not carry with it the right of publication thereof or to use the name of "AECOM" or "Economics Research Associates" in any manner without first obtaining the prior written consent of AECOM. No abstracting, excerpting or summarization of this study may be made without first obtaining the prior written consent of AECOM. Further, AECOM has served solely in the capacity of consultant and has not rendered any expert opinions. This report is not to be used in conjunction with any public or private offering of securities, debt, equity, or other similar purpose where it may be relied upon to any degree by any person other than the client, nor is any third party entitled to rely upon this report, without first obtaining the prior written consent of AECOM. This study may not be used for purposes other than that for which it is prepared or for which prior written consent has first been obtained from AECOM. Any changes made to the study, or any use of the study not specifically prescribed under agreement between the parties or otherwise expressly approved by AECOM, shall be at the sole risk of the party making such changes or adopting such use.

This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.



01

Executive Summary of Findings

AECOM was contracted through a competitive bid process by the South Carolina Department of Parks, Recreation, and Tourism to review and estimate the economic impacts of film production in South Carolina since 2007 as a result of the film production incentives in the state. A number of firms were reviewed and AECOM was selected based on price and extensive history of work in the film and media industry over the last decade. Over the course of this analysis, AECOM reviewed audit data available for expenditures from nine applicable productions as well as non-incentivized productions, estimated related economic and fiscal impacts within South Carolina from this activity, reviewed South Carolina's incentive program as compared to other state film incentive programs, compared previous South Carolina film analyses to this analysis, and addressed some selected issues and questions ancillary to the economic impacts of the analysis. The results of the analysis and findings are given in this report and summarized here.

Key Findings

- Since 2007, nine qualified productions and a smaller number of non-incentivized productions facilitated by the South Carolina Film Commission generated \$86.9 million in sales for state businesses and supported 1,610 full-time equivalent jobs for South Carolina residents paying \$48.5 million in wages.
- State and local governments received \$6.6 million in revenues from corporate income, personal income, property and sales taxes generated as a result of these productions.
- The State of South Carolina paid \$21 million in wage and supplier rebates to the nine qualified productions since 2007.



- For every \$100 spent on rebates, \$31 came back in the form of taxes, a net loss as is the case with many other film incentive programs in the U.S. However, every \$100 in total rebates also generated \$410 in total economic output (i.e., sales at state businesses) and \$230 in wages to South Carolina residents as shown in the chart below.
 - For every \$100 paid in wage rebates, South Carolina residents earned \$230.
 - For every \$100 spent on supplier rebates, state businesses generated nearly \$370 in sales.

The table and chart below summarize the key findings.

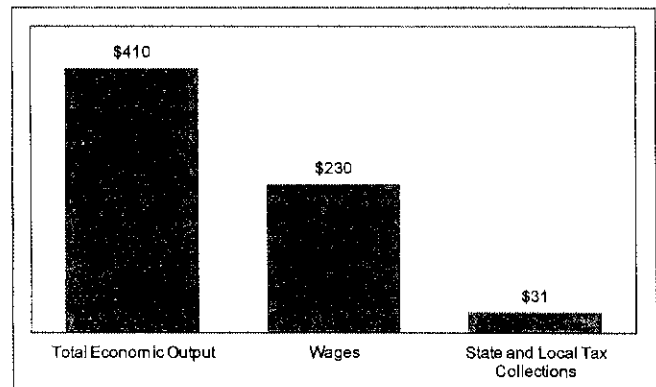
Table 1 – Impacts Attributed to Film and Television Productions Since 2007 in South Carolina

	Total
Economic Impacts	
Total Output (millions)	\$86.9
Full-Time Equivalent Jobs	1,610
Wages (millions)	\$48.5
Net Fiscal Cost (millions)	
Fiscal Impacts	\$6.6
Rebate	\$21.0
Net Fiscal Cost	-\$14.4

FTE = Full-time equivalent

Sources: SC Film Commission, IMPLAN and AECOM

Figure 1 – Costs and Benefits for Every \$100 in Rebates Spent



In all, as reviewed in this analysis the South Carolina film incentive program is more targeted and conservatively managed than many other U.S. film incentive programs. In recent years the Film Commission has developed robust data to better understand the costs and benefits of the program. Current ongoing research is being developed and implemented to understand the direct tourism impacts of production in South Carolina – an issue which other states have yet to understand in greater detail.



02

Incentive Program Comparisons

In this section of the report AECOM explores available film incentive programs nationally and South Carolina's relative position in this competitive landscape, and other previous studies of South Carolina's film incentives. Overall this section aims to set the context with respect to South Carolina's existing film incentive program, and how this compares to other film incentive programs nationally.

U.S. Film Incentive Programs

South Carolina is currently one of 40 states that offer some type of incentive to film and television producers either in the form of tax credits, cash rebates or grant programs. To analyze South Carolina's position among states, this section is divided into three subsections as follows:

1. An overview of the number of recent film and television productions in individual states, either for calendar year or fiscal year ("FY") 2010;
2. An overview of the current types of incentives (i.e. tax credits, rebates, etc.) and characteristics of the current film incentive programs offered in individual states;
3. An estimate (as available) of individual state spending on film production this year.

Recent Film & Television Production Activity in the U.S.

To put South Carolina's film and production activity in perspective, AECOM reviewed recent film and television production numbers for calendar or FY 2010, as reported to the Motion Picture Association of America ("MPAA"). This information appears in the table that follows. California and New York lead the U.S. in terms of annual production activity. As noted in the table, the numbers that are reported for California pertain only to location shoots for film and television projects and exclude studio shoots. As the headquarters for most film and television studios in the U.S., California contains between 4 and 5 million square feet of total studio space, compared to the approximate one million square feet of space in the



state of New York. Therefore, the numbers for California would likely be considerably higher than those for New York.

Other states that have been generating over 100 combined film and television productions each year include the neighboring state of Georgia (111 in 2010), Michigan (112), and Texas (148). The average state generated a total of 16 film and television projects last year according to this data. For comparative purposes, South Carolina attracted a total of 13, which is close to the national average.

Overview of Current Film Incentives in the U.S.

At this time, a total of 40 states offer film production incentives. Five smaller states – Delaware, New Hampshire, North Dakota, and Vermont – have never offered incentives, though some provide indirect incentives such as lodging and sales tax exemptions that may be available to producers. Two other states – Iowa and New Jersey – recently suspended their programs. Iowa suspended its program after widespread abuse and fraud was uncovered, and New Jersey suspended its program, though legislators and film producers are pushing for reinstatement. Three other states – Arizona, Nebraska and Nevada – have legislation pending to modify, add or repeal their incentives. Finally, three additional states – Arkansas, Idaho and Maine – did not appropriate funds for their programs in 2011 and remain unfunded at this time. This means that a total of 37 states have some sort of funding available for producers.

An overview of these incentives, including the type offered: (a) tax credit ("TC"); (b) cash rebate ("R"); (c) grant ("G"), or a combination thereof appears in a later table. At this time, a total of 25 states offer tax credits only, 10 states offer rebates only, 1 state (Texas) provides a grant program, and 4 states provide a combination of two or more of these incentives programs.



Table 2 – Film and Television Projects by State, 2010

State	Film	TV	Total	State	Film	TV	Total
South Carolina	3	5	8				
Regional Competitors							
Georgia	44	67	111				
Louisiana	69	18	87				
North Carolina	15	15	30				
Other States							
Alabama	6	1	7	Montana	1	1	2
Alaska	5	15	20	Nebraska	2		2
Arizona	12	3	15	Nevada	15	10	25
Arkansas	5	1	6	New Hampshire	3	4	7
California ¹	273	254	527	New Jersey	32	19	51
Colorado	11	9	20	New Mexico	23	6	29
Connecticut	20	6	26	New York	279	345	624
Delaware	5	0	5	North Dakota	4		4
District of Columbia	3	12	15	Ohio	15	3	18
Florida	31	34	65	Oklahoma	23		23
Hawaii	9	4	13	Oregon	18	5	23
Idaho	8		8	Pennsylvania	34	25	59
Illinois	37	37	74	Puerto Rico	6		6
Indiana	12		12	Rhode Island	7	3	10
Iowa	26		26	South Dakota	1	1	2
Kansas	2		2	Tennessee	20	6	26
Kentucky	3	4	7	Texas	103	45	148
Maine	3	2	5	Utah	31	4	35
Maryland	5	1	6	Vermont	4		4
Massachusetts	9	9	18	Virginia	18	11	29
Michigan	93	19	112	Washington	9		9
Minnesota	12	27	39	West Virginia	2	2	4
Mississippi	6		6	Wisconsin	13		13
Missouri	7		7	Wyoming	5	5	10

Note: Data pertains to either calendar year 2010 or FY 2010, as reported to the MPAA, and the South Carolina Film Commission

¹ Pertains to location shoots only. Actual numbers would be considerably higher since CA has 4 times the amount of studio space of NY

Source: Motion Picture Association of America and AECOM

Film Incentive Program Caps

The information presented in a later table lists the current percentage of “qualifying spend,” whether additional resident and non-resident wages are included, whether a shooting bonus is offered for filming outside of major metropolitan areas, and whether the state offers an annual cap. Currently, seven states – Connecticut, Georgia, Illinois, Louisiana, Massachusetts, Montana, and North Carolina – do not have an annual cap in place. That being said, certain per project caps or salary caps are in place as follows:

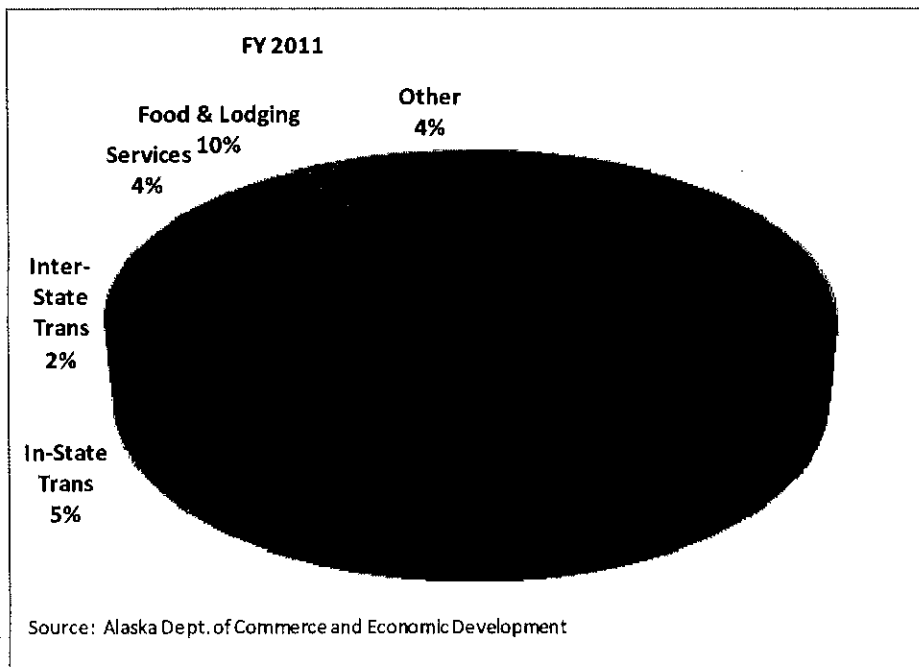
- Connecticut places an aggregate “star talent” compensation project cap of \$20 million;



- Georgia has a \$500,000 per person per project cap on W-2 salaries only;
- Illinois, which covers 15 percent of resident labor expenditures, limits compensation to \$100,000 per employee;
- Louisiana has a \$1 million per person cap on the 5% Louisiana payroll credit;
- Massachusetts' 25 percent payroll credit excludes salaries of > \$1 million;
- Montana imposes a per person cap of \$50,000 on the 14 percent resident wage credit;
- North Carolina has a cap of \$1 million on compensation.

Note that while Louisiana and Georgia have salary caps with respect to incentives there are "workarounds" that are possible for other types of expenditures that may increase the overall reimbursement for above-the-line credits. (Note: Above-the-line talent refers to the creative talent involved in a film (i.e., director, producer, writer and actors), while below-the-line talent involves all other crew members, including technical, professional and skilled tradespersons.) With the exception of Illinois and Montana, which do not cover non-resident above- and below-the-line labor, the remaining five states do cover both types of positions. This has led to criticism among opponents of film incentive programs, who argue that the money is being used to pay people domiciled out of state.

Figure 2 – Alaska Film Production Spend



For example, a review of data provided by the Alaska Dept. of Commerce and Economic Development for FY 2011, shows that of the approximate \$19 million that was spent by productions in Alaska this past year (FY 2011), nearly \$11 million (57 percent) went to out-of-state crew and talent. Similarly, the State of Michigan recently capped non-resident wages at 25 percent

for below-the-line and 27 percent for above-the-line. Prior to October 2011, the state had provided 40 percent of non-resident, above-the-line talent, capped at \$2 million per person.

By comparison, productions that film in South Carolina only receive a 10 percent cash rebate up to \$35,000 on out-of-state employee wages for both above- and below-the-line positions. All South Carolina residents working on a film production, both above- and below-the-line, are eligible for the full 20 percent



rebate, but only out-of-state actors (including stunt performers) are eligible for the full 20 percent cash rebate, provided they earn less than \$1 million.

Unlike the seven states mentioned, most states have annual funding or appropriation caps in place. A later table lists the current 2011 appropriations by state. As shown, the average annual cap is approximately \$32 million this year, with the median being closer to \$8 million. In South Carolina, there is an annual cap on the amount of rebate funds available per year, which is typically \$15 million each fiscal year; a figure that is not excessive compared to other national incentive programs.

One notable change in film incentive programs over the past year has been the sudden cap to annual funding in two states that previously has no funding limits – Michigan and New Mexico. New Mexico recently capped its incentive at \$50 million, and Michigan also capped theirs at \$25 million, though it has been increased to \$100 million for FY 2012. At this time, New Mexico only has two films in production, both smaller, independent offerings, though two television shows – AMC's Breaking Bad and USA Network's In Plain Sight – are still based there. Both of those series are coming to an end after their fifth and final season. And while Michigan attracted over 100 film and television projects last year, this year the number is projected to be closer to 23 total.

Table 3 – Current Film Production Incentives in the U.S., 2011

State	Type	Incentive Characteristics							Other Incentives			
		Refundable?	Transferable?	Qualifying Spend %	Resident Wage Percentage	Non-Resident Wages?	Shooting Bonus?	No Annual State Cap	Infrastructure Credit	Sales Tax Relief	Lodging Tax Relief	Loan Program
South Carolina	R/TC			20-30%	20%	10%			✓	✓	✓	
Regional Competitors												
Georgia	TC		✓	20-30%				✓		✓		✓
Louisiana	TC	✓	✓	30%	5%			✓				✓
North Carolina	TC	✓		25%				✓		✓	✓	✓
Other States												
Alabama	TC	✓		25%	35%		✓			✓	✓	
Alaska	TC		✓	30%	10%							
Arizona	Pending									✓		
Arkansas*	R			15%	10%							✓
California	TC			20-25%								
Colorado	R			10%							✓	
Connecticut	TC		✓	10-30%				✓	✓	✓	✓	



State	Type	Incentive Characteristics							Other Incentives				Right to Work State?
		Refundable?	Transferable?	Qualifying Spend %	Resident Wage Percentage	Non-Resident Wages?	Shooting Bonus?	No Annual State Cap	Infrastructure Credit	Sales Tax Relief	Lodging Tax Relief	Loan Program	
Delaware	None								✓				
District of Columbia	Under Review												
Florida	TC		✓	20%			✓			✓			✓
Hawaii	TC	✓		15-20%			✓		✓				
Idaho*	R			20%						✓	✓		✓
Illinois	TC		✓	30%	15%			✓					
Indiana	TC	✓		15%							✓		
Iowa	Suspended										✓		
Kansas	TC			30%									✓
Kentucky	TC	✓		20%						✓	✓		
Maine*	R			5%	12%	10%				✓	✓		
Maryland	R	✓		25-27%						✓			
Massachusetts	TC	✓	✓	25%	25%			✓		✓			
Michigan	TC	✓	✓	27%	32%	25-27%	✓		✓		✓	✓	
Minnesota	R			15-20%						✓	✓		
Mississippi	R			25%	30%	25%				✓			✓
Missouri	TC		✓	35%									
Montana	TC		✓	9%	14%			✓			✓		
Nebraska	Pending										✓		
Nevada	Pending										✓		
New Hampshire	None												
New Jersey	Suspended									✓	✓		
New Mexico	TC		✓	25%						✓	✓	✓	
New York	TC		✓	30%						✓			
North Dakota	None										✓		
Ohio	TC	✓		25%	35%						✓		
Oklahoma	R			35-37%			✓		✓	✓			✓
Oregon	R			20%	10-16%						✓		
Pennsylvania	TC		✓	25%							✓		
Puerto Rico	TC		✓	40%	40%	20%			✓				
Rhode Island	TC		✓	25%									
Tennessee	G/TC	✓		17%			✓						✓
Texas	G			5-15%	8-25%		✓			✓	✓		✓
Utah	R/TC	✓		25%						✓	✓		✓



State	Type	Incentive Characteristics							Other Incentives				
		Refundable?	Transferable?	Qualifying Spend %	Resident Wage Percentage	Non-Resident Wages?	Shooting Bonus?	No Annual State Cap	Infrastructure Credit	Sales Tax Relief	Lodging Tax Relief	Loan Program	Right to Work State?
Vermont	None									✓	✓		
Virginia	R/TC	✓		15-20%	10-20%					✓	✓		✓
Washington	R			30%						✓	✓		
West Virginia	TC			27%			✓			✓	✓		
Wisconsin	TC		✓	25%	25%				✓	✓			
Wyoming	R			12-15%							✓		✓

* These states currently do not have funds in their film incentive program for 2011

G = Grant; R = Rebate; TC = Tax credit

Sources: Incentive Solutions (2011), Individual film commissions and AECOM

Film Incentive Minimum Spend Requirements

The next table shows that the minimum spend requirement ranges from \$0 in Montana up to \$1 million in states like South Carolina, California, Utah and Oregon. This means that states like South Carolina are trying to attract higher budgeted projects such as film and television productions, that will have a greater economic impact on the state spend.

Table 4 – Annual Cap and Minimum Spend Requirements, FY 2011

State	Type	Annual Cap	Minimum Spend* (\$000s)	State	Type	Annual Cap	Minimum Spend* (\$000s)
South Carolina	R/TC	\$15	\$1,000				
Regional Competitors							
Georgia	TC	None	\$500				
Louisiana	TC	None	\$300				
North Carolina	TC	None	\$250				
Other States							
Alabama	TC	\$10	\$500	Montana	TC	None	\$0
Alaska	TC	\$100	\$100	Nebraska	Pending	--	--
Arizona	Pending	\$0	--	Nevada	Pending	--	--
Arkansas	R	\$0	\$50	New Hampshire	None	--	--
California	TC	\$100	\$1,000	New Jersey	Suspended	--	--
Colorado	R	\$0.6	\$100-\$250	New Mexico ²	TC	\$50	See Notes ²
Connecticut	TC	None	\$100-\$1,000	New York	TC	\$420	\$15,000
Delaware	None	--	--	North Dakota	None	--	--



State	Type	Annual Cap	Minimum Spend* (\$000s)	State	Type	Annual Cap	Minimum Spend* (\$000s)
District of Columbia	Under Review	--	--	Ohio	TC	\$10	\$250
Florida	TC	\$53.5	\$625	Oklahoma	R	\$5	\$25
Hawaii	TC	None	\$200	Oregon	R	\$7.5	\$750-\$1,000
Idaho	R	\$0	\$200	Pennsylvania ³	TC	\$60	See Notes ³
Illinois	TC	None	\$50-\$100	Puerto Rico	TC	\$50	\$100
Indiana	TC	\$2.5	\$100	Rhode Island	TC	\$15	\$300
Iowa	Suspended	--	--	Tennessee	G/TC	\$20	\$150-\$500
Kansas	TC	\$2	\$50-\$100	Texas	G	\$30	\$250
Kentucky	TC	\$7	\$500	Utah	R/TC	\$6.8	\$1,000
Maine	R	None	\$75	Vermont	None	--	--
Maryland	n	\$7.5	\$500	Virginia	R/TC	\$4	Varies
Massachusetts	TC	None	\$50	Washington	R	\$3.5	\$500
Michigan	TC	\$25	\$50	West Virginia	TC	\$10	\$25
Minnesota ¹	R	\$1	See Notes ¹	Wisconsin	TC	\$0.5	\$50
Mississippi	R	\$20	\$50	Wyoming	R	\$1.2	\$200
Missouri	TC	\$4.5	\$50-\$100				
Average		\$32	\$676				
Median		\$8	\$200-\$250				

¹ To qualify, feature films must be ≥ 80 minutes, 60% of principal photography days must be local, or ≥ 60% of principal and post-production must be local

² No minimum spend, however, there is a \$5 million cap per project on credit for all performing artists, as long as the amount does not exceed \$20 million

³ No minimum spend, however, ≥ 60% of budget must be spent locally

G = Grant; R = Rebate; TC = Tax credit

Source: Individual film commissions and AECOM

Types of Film Productions Covered

The next table lists the types of productions that qualify for film incentives. Most states now offer incentives for commercial productions, though the minimum spend and qualifying spend requirements may vary. In recent years, video games and digital media projects have been added.



Table 5 – Types of Film Productions Covered, 2011

State	Type	Feature Film	Documentaries	TV Programs	Sound Recordings	Videos	Music Videos	Commercials	Videogames	Digital Media
South Carolina	R/TC	✓	✓	✓		✓		✓		
Regional Competitors										
Georgia	TC	✓		✓	✓	✓	✓	✓	✓	✓
Louisiana	TC	✓		✓		✓		✓		
North Carolina	TC	✓	✓	✓				✓		✓
Other States										
Alabama	TC	✓	✓	✓	✓	✓	✓	✓		
Alaska	TC	✓	✓			✓		✓		
Arkansas	R	✓	✓	✓		✓	✓	✓	✓	✓
California	TC	✓		✓						
Colorado	R	✓	✓	✓				✓		
Connecticut	TC	✓	✓	✓	✓	✓	✓	✓	✓	✓
Florida	TC	✓		✓		✓		✓	✓	✓
Hawaii	TC	✓	✓	✓	✓	✓		✓	✓	✓
Illinois	TC	✓	✓	✓		✓				
Indiana	TC	✓	✓	✓		✓	✓			✓
Kansas	TC	✓	✓			✓		✓		
Kentucky	TC	✓	✓					✓		
Maine	R	✓	✓	✓		✓	✓	✓		
Maryland	R	✓	✓	✓			✓	✓		
Massachusetts	TC	✓		✓		✓		✓		✓
Michigan	TC	✓	✓	✓		✓	✓	✓	✓	✓
Minnesota	R	✓	✓	✓				✓		✓
Mississippi	R	✓	✓	✓		✓		✓		
Missouri	TC	✓	✓	✓		✓		✓		
Montana	TC	✓	✓	✓		✓	✓	✓		✓
New Mexico	TC	✓	✓	✓		✓	✓	✓	✓	
New York	TC	✓		✓				✓		
Ohio	TC	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oklahoma	R	✓	✓					✓		
Oregon	R	✓	✓	✓				✓		
Pennsylvania	TC	✓		✓				✓		
Puerto Rico	TC	✓	✓	✓	✓		✓	✓	✓	
Rhode Island	TC	✓	✓	✓		✓		✓		
Tennessee	G/TC	✓	✓	✓				✓		
Texas	G	✓	✓	✓		✓	✓	✓	✓	
Utah	R/TC	✓	✓	✓						✓



State	Type	Feature Film	Documentaries	TV Programs	Sound Recordings	Videos	Music Videos	Commercials	Videogames	Digital Media
Virginia	R/TC	✓	✓	✓		✓	✓	✓		
Washington	R	✓		✓				✓		
West Virginia	TC	✓		✓			✓	✓		
Wisconsin	TC	✓		✓		✓			✓	
Wyoming	R	✓		✓			✓	✓		

G = Grant; R = Rebate; TC = Tax credit
Source: Individual film commissions and AECOM

Current Film Incentives in South Carolina

Motion Picture Tax Credit

In addition to the 20 percent wage rebate and 30 percent supplier rebate, producers and investors who create motion pictures can receive up to 20 percent of their cash investment, with a limit of \$100,000 per tax payer.

Tax Credit for a Motion Picture Production/Post-Production Facility

Investors who build motion picture production or post-production facilities can claim an income tax credit of up to 20 percent, provided credits by all taxpayers in a single facility do not exceed \$5 million.

South Carolina Production Fund

Mandated by the South Carolina Legislature as part of the incentive program to attract film production to the state, the South Carolina Production Fund grants and training seminars help South Carolina students and professionals become prepared to work on feature films or advance in their profession. The South Carolina Film Production Fund was created to develop projects in film, video and multimedia between professionals in motion picture and related industries, and South Carolina institutions of higher learning. Professionals in motion picture-related fields partner with South Carolina colleges to help develop the talent pool. Each school has been awarded \$100,000 to collaborate with South Carolina independent producers and media professionals. Mini-Grants are also available.

The Production Fund is for writers, directors and producers who will collaborate with colleges to produce short films using professionals as mentors and advisors. To date, the Production fund has created 7 short films and animations working with USC, Clemson, and Trident Tech. Over 60 students have participated in this apprenticeship program. The USC grant also includes 140 hours of classroom instruction during the fall and spring semesters, culminating in the creation of a short film.

The SC Indie Grant program helps producers who work with students at Trident Technical College. Collaborative efforts in a professional short film help SC producers create a "sizzle reel" or film calling card. Grant funds are available for the production of short films designed to give local professionals an opportunity to showcase their skill, build alliances with professional filmmakers and mentor students and



aspiring professionals. This program, in its second year has produced 6 short films, two of which have won national awards, and have helped train 10 Trident Tech students.

Just started in 2011, High school students from through-out South Carolina will be encouraged to create a short film using South Carolina State Parks as a practical location in their films.

Also, regularly scheduled seminars for professionals and students are presented around the state each year. Past seminars, led by nationally known experts included: Final Cut Pro editing, writing, lift safety, PA Bootcamp, marketing and distribution, casting and other topics needed for both students and professionals to be prepared for the entertainment industry. Over 800 have been trained in the last five years.

Overview of South Carolina Film Incentives

The State of South Carolina has not engaged as extensively in the highly competitive incentive race. With neighboring states like Georgia and North Carolina, this would be difficult at this point in the film incentive process. According FY 2011 data from the Georgia Film Office, a total of 83 film and television productions with combined budgets of \$671.6 million shot in the state. This year has also been North Carolina's busiest year in the film industry with productions having a direct spend of over \$200 million. "Iron Man 3" will add to their record breaking year and carry over into 2012.

What States Spend on Film Incentive Programs

The primary objective of tax incentives is typically to encourage a self-sustaining industry. With significant budget deficits and waning revenues, however, some lawmakers are taking a closer look at tax credits for filmmakers and either (a) reducing their annual appropriations (as in the recent case of new Mexico and Michigan), or suspending their programs (i.e., New Jersey and Iowa).

One of the problems is that the film industry is mobile and production can vary considerably from year to year. According to the latest report from the Massachusetts Department of Revenue, for instance, in-state production spending fell from \$333 million in 2009 to \$58.4 million in 2010, a decline of 82 percent. And as South Carolina has experienced, in 2006, the state hosted 9 different feature length films and handed out a record \$12 million in tax incentives, the most spend in one year by South Carolina.

The Center on Budget and Policy Priorities estimates that states spent about \$1.5 billion on film tax subsidies last year (2010). This information appears in the following table. It should be noted that there is a lag between the time credits are issued and the time they are redeemed, which sometimes makes them difficult to track. In some instances, the amount of credits issued one year may also exceed state spend that same year. Based on the available information from film commissions, AECOM estimates that total state incentive spending will be in the order of roughly \$1 billion this year.

Table 6 – Dollars Appropriated or Claimed for Film Production Funds (Millions)

State	Dollars Appropriated or Claimed FY 2010 ¹	Dollars Appropriated or Claimed FY 2011 ²	FY 2011 Annual Cap
South Carolina	15		\$15.0
Regional Competitors			
Georgia	33.5	130	None



State	Dollars Appropriated or Claimed FY 2010 ¹	Dollars Appropriated or Claimed FY 2011 ²	FY 2011 Annual Cap
Louisiana	139	102	None
North Carolina	22.5	n/a	None
Other States			
Alabama	7.5	n/a*	\$10.0
Alaska	20	5.7	\$100.0
Arizona	70	0	\$0.0
Arkansas	0	0	\$0.0
California	100	100	\$100.0
Colorado	0.3	n/a	\$0.6
Connecticut	116	37.6	None
Florida	53.5	53.5	\$53.5
Hawaii	16.2	30	None
Idaho	0	0	\$0.0
Illinois	20.5	20.5	None
Indiana	2.5	0.063	\$2.5
Iowa	12.9	0	\$0.0
Kansas	0	0	\$2.0
Kentucky	15	n/a*	\$7.0
Maine	0	0	None
Maryland	2	n/a	\$7.5
Massachusetts	100	14.6	None
Michigan	110	25	\$25.0
Minnesota	2.5	0.95	\$1.0
Mississippi	20	n/a	\$20.0
Missouri	4.5	n/a	\$4.5
Montana	0	n/a	None
New Jersey	15	0	\$0.00
New Mexico	66.7	50	\$50.0
New York	350	420	\$420.0
Ohio	10	n/a	\$10.0
Oklahoma	5	n/a	\$5.0
Oregon	5	7.5	\$7.5
Pennsylvania	74		\$60.0
Rhode Island	15	n/a	\$15.0
Tennessee	20	4.0	\$20.0
Texas	11	n/a	\$30.0
Utah	7.5	n/a	\$6.8
Virginia	1.25	2.5	\$4.0
Washington	3.5	n/a	\$3.5
West Virginia	10	n/a	\$10.0
Wisconsin	0.9	n/a	\$0.5
Wyoming	2	n/a	\$1.2
Total	\$1,475	\$1,004	\$992

* means that although figures may not be available, film commissions report on capping out

¹ Based on data from Center on Budget and Policy Priorities (updated December 2010)

² AECOM estimates based on data from film commissions (as available)

Sources: Center on Budget and Policy Priorities, individual film commissions and AECOM



Previous South Carolina Film Analyses

AECOM was provided and reviewed two previous studies of the South Carolina film incentives program. The first was completed in 2007 by the Moore School of Business at the University of South Carolina for the South Carolina Department of Commerce. The report reviews films and series produced in-state from 2006-2007 using an IMPLAN multiplier model. While impacts from 8 projects are shown it is referred to as 7 in the body of the analysis (AECOM is unsure if this is simply a reference mistake). Key findings of this analysis conclude that the labor income effect for every \$1.00 spent on South Carolina wages is \$1.30, while this figure is \$3.68 in output effect for every \$1.00 spent in rebates for suppliers. The output multiplier appears to be the result of categorizing spending by appropriate multiplier categories within IMPLAN (discussed later). The report did not include a net fiscal cost analysis or related estimates.

The second analysis was completed in 2008 by the College of Charleston for the South Carolina Coordinating Council for Economic Development. The analysis includes a review of 9 productions from 2006-2007 using an IMPLAN multiplier model. Key findings of this analysis conclude that South Carolina experiences \$3.76 in output effect for every \$1.00 spent in rebates for suppliers. The output multiplier used is the Sector 418 code for the Motion Picture and Video Industry rather than itemized expenditure categories. The fiscal impact analysis appears to assume a tax impact generated from state ratios of income to fiscal revenues. The analysis also assumes no spending takes place in-state by out-of-state employees working on the project in South Carolina.

Direct comparisons between the two analyses can be somewhat problematic given the different methodologies, though some similarities and differences include:

- Both analyses utilize IMPLAN impact models which is a commonly accepted tool in estimating impacts for this sort of economic activity. The IMPLAN model is similarly used by AECOM for the purposes of estimated in this analysis;
- The output effect estimated by each analysis is relatively close (\$3.68 vs. \$3.76).
- The first analysis does not include a net fiscal impact calculation, which can obscure the actual cost of the program depending on the reader's familiarity with economic impact analysis. The second analysis did include such an analysis as does the AECOM analysis. The second analysis also uses a uniform ratio from the state economy for tax receipts to income, which is then applied to the film industry analysis. This approach may not fully value tax contributions as production can more often occur in places with greater levels of physical and human infrastructure which typically also have higher tax burdens (ex. cities and more urban areas).
- The second analysis utilizes the Motion Picture and Video Industry sector code within IMPLAN to generate the multiplier estimates. Whenever possible (and based on available data) actual itemized spending is preferred since the IMPLAN code includes movie theatres which can significantly skew results as such establishments typically have fewer employees per dollar of revenue as well as lesser paid employees as compared to actors, producers and crew working on a production. AECOM requested and received the itemized expenditures by film which were used in the impacts for this analysis;
- And lastly, the second analysis assumes no spending in-state by out-of-state employees working on production in South Carolina. The South Carolina Film Commission has begun conducting surveys of



such employees and now has some data to support spending by these employees (albeit still well below their actual levels of salary). AECOM used this survey data to estimate impact from spending by these out-of-state residents employed in local production projects.



03

Economic and Fiscal Impact Estimates

In this section, AECOM presents the economic and fiscal impacts of film and television productions that were produced, in part, in South Carolina since 2007. The following nine productions met the criteria to qualify for incentives as outlined by the South Carolina Film Commission:

- Angel Camouflaged
- Army Wives, seasons 3, 4 and 5
- The Bay
- Dear John
- Little Red Wagon
- Nailed
- New Daughter

In addition, AECOM estimated the economic and fiscal impacts of productions that did not qualify for incentives such as commercials, documentaries, and television episodes, as these productions are similarly facilitated by the Film Commission. Impacts of the two types of productions are presented separately.

Methodology

AECOM used IMPLAN, a commonly used and accepted proprietary software that runs on data collected by the Minnesota IMPLAN Group to estimate economic impacts of a change in the economy, in this case, wages and spending associated with film and television productions made in South Carolina. More than 1,500 clients across the country, including government agencies, non-profit agencies, industry associations and private companies use IMPLAN to prepare location-specific economic impact analysis. IMPLAN data files are compiled from a wide variety of sources including the U.S. Bureau of Economic



Analysis, the U.S. Bureau of Labor and the U.S. Census Bureau. Economic impact analysis traces the changes in economic activity in a defined geographic region (the State of South Carolina) resulting from some action (qualifying film expenditures or wages), identifies the economic sectors that are impacted by that activity and estimates the resulting changes in output, employment and income in the region as defined below:

- **Output:** This is the total value of goods and services produced across all industry sectors and all stages of production in the study area;
- **Employment:** This represents the number of jobs needed to support the given economic activity across all sectors. It includes all wage and salary employees, both part- and full-time, as well as self-employed jobs. AECOM converted this data to measure full-time equivalent jobs which equates to 35 hours per week or 227.5 days per year;
- **Compensation:** The total payroll costs (including benefits) of each industry. It includes the wages and salaries of workers who are paid by employers, as well as benefits such as health and life insurance, retirement payments and non-cash compensation. It also includes proprietary income received by self-employed individuals.

The economic impacts were measured using only those dollars that were spent in South Carolina as determined by examining the detailed audits conducted for the South Carolina Film Commission. The audits detail all expenditures made by the productions which includes everything from construction materials to cast lodging, catering, transportations, equipment, props, etc. Only those expenses made at a South Carolina business were included. In addition, wage records for all cast, crew and administration were provided with detailed information on days and dates worked, total wages, withholding tax and residency. This level of detail allowed for a very precise analysis of how production companies spend their dollars rather than using IMPLAN to estimate how a motion picture company generally allocates its spending in South Carolina. The most current IMPLAN data for South Carolina was used for this analysis.

Spending and the associated economic impacts generate revenues for state and local governments in the form of fees, permits and taxes, i.e., fiscal impacts. AECOM estimated the following state and local tax revenues: corporate income tax, personal income tax, property tax and sales and use tax. Note that these are not all of the revenues that could be collected by the wage and spending impacts, however it represents the majority. Effective rates were measured using 2009 baseline data collected by the U.S. Census Bureau on state and local government finances relative to total Gross Domestic Product (GDP) and total personal income from the U.S. Bureau of Economic Analysis. The effective rates for corporate income and property taxes were measured as a share of total GDP. Individual income tax ranges from 0 to 7 percent in South Carolina. Therefore, an effective rate was determined using total personal income. State sales tax was applied to select goods and services. Local sales tax was measured using the relationship to state sales tax collections. These rates will be applied to the appropriate economic impacts.



Table 7 – Effective Tax Rates for Fiscal Impacts

	2009 Baseline (millions)	Effective Rate	
Gross Domestic Product	\$159,593		
Total Personal Income	\$145,042		
Tax Collections			
Property Tax	\$4,423	2.79%	of total output
Sales Tax			
State	\$2,910	6.00%	select goods and services
Local	\$219	7.54%	share of state sales taxes
Individual Income	\$2,812	4.33%	of wages
Corporate Income	\$249	0.16%	of total output
Total Select Taxes	\$10,614		

Sources: U.S. BEA, U.S. BLS, U.S. Census Bureau

Many of the productions receiving incentives also qualify for a state sales tax exemption. Therefore, state and local sales taxes associated with the direct spending are not included in the fiscal impact analysis, though in some cases they are still paid.

Film Incentives

To qualify for incentives, a production company must spend a minimum of \$1 million in total production costs within a calendar year. For complete details on the incentives currently offered by the State of South Carolina, please visit their website (www.filmSC.com). The South Carolina Film Commission audits productions applying for incentives and determines if the spending occurred at a qualified South Carolina business. Wages paid to South Carolina residents and non-residents working during these productions were also provided to AECOM. This data forms the base of our analysis.

The following table shows that the nine productions paid a total of \$56.5 million in eligible wages earning a rebate of \$9.4 million. They purchased more than \$73.5 million in goods and services of which \$38.7 million was spent at South Carolina businesses and qualified for a 30 percent rebate. Combined, these nine productions received \$21 million from the State of South Carolina in incentives.

Table 8 – Summary of Productions Receiving Incentives since 2007 (in millions)

Production	Total Production	Wages		Suppliers		
		SC Eligible	Rebate	Total	SC Spend	Rebate
Angel Camouflaged	\$3.0	\$1.3	\$0.2	\$1.3	\$0.7	\$0.2
Army Wives, season 3	\$51.3	\$7.7	\$1.4	\$12.8	\$9.6	\$2.9
Army Wives, season 4	\$45.5	\$6.9	\$1.4	\$13.0	\$10.0	\$3.0
Army Wives, season 5*	NA	\$14.5	\$2.9	NA	\$7.1	\$2.1
The Bay	\$2.5	\$0.8	\$0.1	\$0.8	\$0.6	\$0.2
Dear John	\$37.7	\$8.7	\$1.2	\$4.9	\$4.3	\$1.3
Little Red Wagon	\$6.0	\$2.7	\$0.4	\$1.3	\$1.2	\$0.3
Nailed	\$30.6	\$9.6	\$1.2	\$30.6	\$3.5	\$1.1
New Daughter	\$13.7	\$4.1	\$0.6	\$8.8	\$1.9	\$0.6
Total	\$190.2	\$56.5	\$9.4	\$73.5	\$38.7	\$11.6

NA = Not available

* Preliminary estimates

Note: Totals may not add due to rounding

Source: SC Film Commission



It should be noted that the data for *Army Wives*, season 5 is still being reviewed and should be considered preliminary, though close to the final estimate.

Since 2007, qualified productions hired 9,200 people (both residents and non-residents) as actors, managers, stunt performers, extras, crew, construction, administration, support services, etc. This job count includes everyone who worked on the production, even if only for one day. When adjusting for the fact that many people worked on several productions during this time period, there were nearly 7,000 individuals hired at some point. Due to the nature of work in the film industry, these jobs are short-term. Therefore, using data from IMPLAN, AECOM estimated the number of full-time equivalent (FTE) jobs this would represent. Since 2007, there were 1,010 FTEs created as a direct result of the qualified productions.

The most direct way that the film industry impacts South Carolina is by hiring residents. There were nearly 7,400 positions filled by 5,600 residents since 2007. This equates to 820 full-time equivalent jobs created.

Wages

Wages of all South Carolina residents working on qualified productions are eligible for the maximum 20 percent wage rebate. In addition, a production is eligible for a wage rebate up to 20 percent for non-resident performing artists. Wages of all other non-residents are eligible for a 10 percent wage rebate up to \$3,500 per person. However, for qualifying television series, the wages of all non-residents are eligible for the 20 percent rebate. All wages must be subject to South Carolina withholding tax to be eligible for the rebate.

As shown above, the nine productions completed since 2007 paid \$56.5 million in eligible wages. However, not all of this expenditure stayed within South Carolina. Information on residency was collected by the South Carolina Film Commission. All wages paid to South Carolina residents were included in the impact analysis. For non-residents, AECOM allocated a per diem based on a recent survey of the cast and crew of *Army Wives* and applied it to the number of days worked in South Carolina. The per diem is what the cast and crew spent in addition to what the production company paid for housing, transportation and meals. On average, non-residents spent approximately \$83 per production day for things such as living expenses, entertainment, household expenses, health care, souvenirs, etc. The table below shows the wages paid to residents and non-resident per diems estimated to have remained within South Carolina and paid to local businesses for goods and services. Of the \$56.5 million paid in total wages, an estimated \$22.4 million remained in South Carolina and circulated throughout the state. The majority of those wages were paid to residents, \$18.1 million.

For every dollar paid in wage rebates, South Carolina residents earned \$1.93. This is up considerably from the Hefner study prepared for the South Carolina Coordinating Council for Economic Development which examined the impacts of nine productions made in 2006 to 2007. This is due to the much higher share of wages being paid to residents. In his study, only 18 percent of the wages went to residents yielding a \$0.97 return. Since 2007, 32 percent of the wages are paid to South Carolinians.

In IMPLAN, there are two ways to examine how a change in wages affects the economy – as a change in household income or a change in labor income. In both cases, the economic sector in which the wages were paid is not modeled (i.e., \$1 million in wages for restaurant workers). Instead, both models look at



an overall change in the economic wealth of residents in the study area. When modeling a change in labor income, the payroll and associated spending implications are distributed across all household sectors in the region. If the change in household income is used, a specific household income category would have to be selected (e.g., \$35-50,000 in household income) and the spending would be distributed for this income group only. Since there is a wide range of salaries paid to management, cast and crew associated with these nine productions, AECOM opted for a broad spectrum approach to be more representative and used the labor income methodology here.

AECOM examined the induced spending impacts generated by the \$22.4 million in wages occurring since 2007. It is assumed here that wages will be re-spent rather than saved. For every dollar paid in wages that remain in South Carolina from a qualified production, an additional \$0.77 is generated in induced spending impacts for a total of \$17.3 million in induced spending. In addition, these wages and induced spending supported 150 full-time equivalent jobs throughout the state with \$5.6 million in wages.

Table 9 – Economic Impacts of Wages Remaining in South Carolina since 2007

	2007*	2008	2009	2010	2011	Total
Initial Impacts						
Wages (millions)	\$0.01	\$8.1	\$4.0	\$6.6	\$3.8	\$22.4
Jobs, FTE	**	260	160	250	150	820
Wage Impacts						
Induced impacts (millions)	\$0.01	\$6.2	\$3.1	\$5.1	\$2.9	\$17.3
Jobs, FTE	**	50	30	40	30	150
Wages (millions)	\$0.0	\$2.0	\$1.0	\$1.7	\$0.9	\$5.6

	FY 07-08	FY 08-09	FY 09-10	FY 10-11	FY 11-12*	Total
Initial Impacts						
Wages (millions)	\$4.5	\$4.2	\$6.4	\$7.4	\$0.0	\$22.4
Jobs, FTE	130	150	250	280	**	820
Wage Impacts						
Induced impacts (millions)	\$3.4	\$3.2	\$4.9	\$5.7	\$0.0	\$17.3
Jobs (FTE)	30	30	40	50	0	150
Wages (millions)	\$1.1	\$1.1	\$1.6	\$1.9	\$0.0	\$5.6

All revenues in millions.

* Partial year data

** Less than 10 jobs

FTE = Full-time equivalent

Note: Totals may not add due to rounding

Sources: SC Film Commission, IMPLAN and AECOM

To measure the fiscal impacts, AECOM used the effective rates shown earlier. However, total wages (\$56.5 million) were used as the base for personal income tax estimates not just the portion remaining in South Carolina since all eligible wages were subject to withholding. The \$56.5 million in eligible wages, of which \$22.4 million remained and circulated within the South Carolina economy, generated nearly \$3.4 million in state and local fiscal impacts.



Table 10 – Fiscal Impacts of Wages Remaining in South Carolina Since 2007

Fiscal impacts	2007*	2008	2009	2010	2011	Total
Corporate income tax	\$0	\$9,900	\$5,000	\$8,100	\$4,700	\$27,600
Personal income tax	\$1,200	\$1,052,500	\$453,300	\$706,000	\$485,400	\$2,698,400
Property tax	\$200	\$171,900	\$87,100	\$141,700	\$81,300	\$482,100
Sales tax	\$100	\$68,000	\$34,400	\$55,700	\$31,800	\$190,000
Total	\$1,500	\$1,302,200	\$579,700	\$911,600	\$603,200	\$3,398,200

	FY 07-08	FY 08-09	FY 09-10	FY 10-11	FY 11-12*	Total
Corporate income tax	\$5,500	\$5,200	\$7,900	\$9,100	\$0	\$27,600
Personal income tax	\$633,500	\$537,900	\$665,500	\$861,200	\$200	\$2,698,400
Property tax	\$95,500	\$90,100	\$137,800	\$158,700	\$100	\$482,100
Sales tax	\$37,800	\$35,600	\$54,300	\$62,300	\$0	\$190,000
Total	\$772,300	\$668,800	\$865,500	\$1,091,400	\$300	\$3,398,200

* Partial year data

Note: Totals may not add due to rounding

Sources: SC Film Commission, IMPLAN and AECOM

For every dollar spent in wage rebates, \$0.36 was generated in fiscal impacts yielding a net loss of \$0.64 per dollar in wage rebate.

Suppliers

Qualified productions are eligible for a rebate of up to 30 percent spent on qualifying goods and services purchased, rented or leased by the production company from a South Carolina business. All expenditures must be filed with the Film Commission and subject to audit prior to leaving South Carolina.

According to the South Carolina Film Commission, these nine productions had eligible expenses of \$38.7 million and qualified for \$11.6 million in rebates. As with the wage analysis, AECOM focused on including all expenditures made at South Carolina businesses. In some cases, the Film Commission deemed some expenses ineligible for the rebate such as meal money, location fees and vehicle taxes, for example. In other cases, spending was capped for certain types of expenditures such as housing. In both cases, if the purchases were made at a South Carolina business, they were included in the economic and fiscal impact analysis. Airfare expenses as well as baggage fees were not included. For this portion of the analysis AECOM used IMPLAN regional purchasing coefficients (RPC) to reflect actual expenditures recurring within South Carolina.

The following table presents the economic impacts associated with \$38.8 million spent by film and television companies on purchase made at South Carolina businesses since 2007. More than \$25.7 million of the initial spending stayed within the State resulting in a total economic impact of \$42.9 million in goods and services provided by local businesses. This supported 410 full-time equivalent jobs throughout the State paying \$14.3 million in wages as shown below.



Table 11 – Economic Impacts of Supplier Spending Since 2007

	2007*	2008	2009	2010	2011	Total
Initial SC spend	\$0.0	\$9.3	\$11.0	\$12.0	\$6.5	\$38.8
Total Output (millions)						
Direct	\$0.0	\$5.3	\$7.8	\$8.4	\$4.2	\$25.7
Indirect + induced	\$0.0	\$3.6	\$5.2	\$5.5	\$2.9	\$17.3
Total	\$0.0	\$8.9	\$13.0	\$13.9	\$7.1	\$42.9
Jobs, FTE	0	90	120	130	70	410
Wages (millions)	\$0.0	\$3.0	\$4.3	\$4.5	\$2.4	\$14.3

	FY 07-08	FY 08-09	FY 09-10	FY 10-11	FY 11-12*	Total
Initial spend	\$5.4	\$10.9	\$12.5	\$9.9	\$0.1	\$38.8
Total Output (millions)						
Direct	\$3.1	\$7.2	\$8.8	\$6.5	\$0.0	\$25.7
Indirect + induced	\$2.1	\$4.9	\$5.9	\$4.4	\$0.0	\$17.3
Total	\$5.1	\$12.1	\$14.7	\$10.9	\$0.1	\$42.9
Jobs, FTE	50	110	140	100	0	410
Wages (millions)	\$1.8	\$4.1	\$4.8	\$3.6	\$0.0	\$14.3

* Partial year data

FTE = Full-time equivalent

Note: Totals may not add due to rounding

Source: SC Film Commission, IMPLAN and AECOM

This spending in turn generated nearly \$2.1 million in state and local fiscal impacts in the form of corporate and personal income tax, property taxes and sales tax. Since these nine productions are also eligible for a sales tax rebate, sales tax on the direct spending was not included.

Table 12 – Fiscal Impacts of Incentivized Spending at South Carolina Suppliers

	2007*	2008	2009	2010	2011	Total
Corporate income	\$0	\$14,200	\$20,800	\$22,300	\$11,300	\$68,700
Personal income	\$200	\$130,300	\$186,200	\$195,300	\$105,600	\$617,600
Property	\$300	\$247,100	\$363,000	\$389,100	\$197,600	\$1,197,200
State and local sales	\$0	\$34,000	\$50,300	\$52,200	\$28,000	\$164,400
Total	\$500	\$425,600	\$620,300	\$658,900	\$342,500	\$2,047,900

	FY 07-08	FY 08-09	FY 09-10	FY 10-11	FY 11-12*	Total
Corporate income	\$8,200	\$19,400	\$23,500	\$17,400	\$100	\$68,700
Personal income	\$76,000	\$175,500	\$207,200	\$157,700	\$1,200	\$617,600
Property	\$143,500	\$338,400	\$410,400	\$302,800	\$2,100	\$1,197,200
State and local sales	\$0	\$46,800	\$55,500	\$41,800	\$400	\$164,400
Total	\$227,700	\$580,100	\$696,600	\$519,700	\$3,800	\$2,047,900

* Partial year data

Note: Details may not add to totals due to rounding.

Sources: SC Film Commission, IMPLAN and AECOM



Non-Incentivized Spending

In addition to the larger productions that qualify for incentives, there are many smaller productions occurring throughout the State such as television episodes, commercials and print ads. These productions do not qualify for incentives but are similarly facilitated by the Film Commission. From 2007 to date, there have been 258 such productions, most of which were television episodes and print ads. Of the nearly \$38 million spent to produce these shows, more than \$16 million was spent in South Carolina generating additional economic and fiscal benefits. The table below shows that while TV episodes such as sporting events, debates and Wheel of Fortune, spent the largest share of this money (\$5 million), only 37 percent of their total budget was spent in South Carolina. At the same time, firms producing print ads and catalogs such as clothing stores, car companies and hardware stores, spent a higher share of their total budget in state, nearly \$2.7 million.

Table 13 – Non-Incentivized Spending, 2007-2011

Non-Incentivized Production	Productions	Total Spend (millions)	SC Spending (millions)	Share SC Spend
Feature Film	7	\$2.3	\$0.7	30%
MOWs/Cable Movies/TV Series/Pilots	12	\$7.2	\$3.0	42%
Other (Student, Docs.)	20	\$0.4	\$0.3	78%
Print Ads & Catalogs	71	\$3.9	\$2.7	69%
Training/Industrials	14	\$0.6	\$0.2	43%
TV Commercials	50	\$9.7	\$4.5	46%
TV Episodes/Music Videos	84	\$13.6	\$5.0	37%
Total	258	\$37.6	\$16.5	44%

Source: SC Film Commission

The South Carolina Film Commission surveys these companies after production. Details from this survey reveal that since 2007, these non-incentivized productions spent 1,000 days in production throughout South Carolina, hired more than 1,000 residents as part of the crew, 2,000 extras, 400 actors and paid for 7,600 hotel rooms. However, on average, these productions spend a minimum amount of time in South Carolina and hire fewer than 20 South Carolinians as actors, extras and crew as shown in the following table. It should be noted that very often the same people will work on several such productions throughout the year meaning that the above mentioned 1,000 residents hired for the crew may actually be several hundred residents being hired several times since 2007. Data is not available to examine that in further depth.

Table 14 – Average Duration and Employment for Non-Incentivized Productions, 2007-2011

Non-Incentivized Production	Days in SC	SC Hires
Feature Film	15.0	22
MOWs/Cable Movies/TV Series/Pilots	18.4	9
Other (Student, Docs.)	8.7	18
Print Ads & Catalogs	2.7	8
Training/Industrials	2.6	10
TV Commercials	1.3	18
TV Episodes/Music Videos	2.8	13
Average	4.0	13

Source: SC Film Commission

Despite their limited stay in South Carolina, these productions do generate both economic and fiscal impacts. Since detailed spending patterns similar to incentivized productions was not available, AECOM



classified all spending associated with productions that did not receive incentives as part of the motion picture industry. The tables below show the economic impacts of these productions on South Carolina by calendar and fiscal year. The \$16.5 million spent on these productions generated an additional \$10.3 million in indirect and induced spending, supported a total of 230 full-time equivalent jobs paying \$6.1 million in wages.

Table 15 – Economic Impacts of Non-Incentivized Productions by Calendar Year

	2007	2008	2009	2010	2011	Total
Output (millions)						
Direct	\$5.2	\$3.2	\$4.4	\$2.4	\$1.2	\$16.5
Indirect + induced	\$3.3	\$2.0	\$2.7	\$1.5	\$0.7	\$10.3
Total	\$8.5	\$5.2	\$7.1	\$3.9	\$2.0	\$26.7
Other Impacts						
Jobs, FTE	70	50	60	30	20	230
Wages (millions)	\$2.0	\$1.2	\$1.6	\$0.9	\$0.4	\$6.1

FTE = Full-time equivalent

Note: Totals may not add due to rounding

Sources: SC Film Commission, IMPLAN and AECOM

Table 16 – Economic Impacts of Non-Incentivized Productions by Fiscal Year

	FY 2006 -2007*	FY 2007 -2008	FY 2008 -2009	FY 2009 -2010	FY 2010 -2011	FY 2011 -2012*	Total
Output (millions)							
Direct	\$4.1	\$3.4	\$3.6	\$3.4	\$1.5	\$0.6	\$16.5
Indirect + induced	\$2.6	\$2.1	\$2.2	\$2.1	\$0.9	\$0.3	\$10.3
Total	\$6.6	\$5.5	\$5.8	\$5.5	\$2.4	\$0.9	\$26.7
Other Impacts							
Jobs, FTE	60	50	50	50	20	10	230
Wages (millions)	\$1.5	\$1.3	\$1.3	\$1.2	\$0.5	\$0.2	\$6.1

* Partial year data

FTE = Full-time equivalent

Note: Totals may not add due to rounding

Sources: SC Film Commission, IMPLAN and AECOM

The fiscal impacts of this spending follow. What is significant to note is that no incentives were given to these productions, therefore there was no fiscal cost to the State. However, production companies that spend \$250,000 in South Carolina within one calendar year (i.e., 12 consecutive months) may qualify for a states sales and use tax exemption on goods and services purchased, leased or rented for production by the production company. The \$26.7 million in spending associated with non-incentivized productions since 2007 generated more than \$1.1 million in state and local taxes.

Table 17 – Fiscal Impacts of Non-Incentivized Productions by Calendar Year

	2007	2008	2009	2010	2011	Total
Corporate income	\$13,600	\$8,300	\$11,400	\$6,200	\$3,100	\$42,700
Personal income	\$86,400	\$53,000	\$70,400	\$37,600	\$18,600	\$266,000
Property	\$237,400	\$145,300	\$199,500	\$108,500	\$54,600	\$745,300
State and local sales	\$24,100	\$14,700	\$19,800	\$10,500	\$5,200	\$74,300
Total	\$361,500	\$221,300	\$301,100	\$162,800	\$81,500	\$1,128,300

Note: Details may not add to totals due to rounding.

Source: SC Film Commission, IMPLAN and AECOM



Table 18 – Fiscal Impacts of Non-Incentivized Productions by Fiscal Year

	FY 2006 -2007*	FY 2007 -2008	FY 2008 -2009	FY 2009 -2010	FY 2010 -2011	FY 2011 -2012*	Total
Corporate income	\$10,600	\$8,800	\$9,300	\$8,900	\$3,800	\$1,400	\$42,700
Personal income	\$67,100	\$55,800	\$57,800	\$54,100	\$22,700	\$8,400	\$266,000
Property	\$184,400	\$152,900	\$162,700	\$154,700	\$65,900	\$24,800	\$745,300
State and local sales	\$18,700	\$15,500	\$16,200	\$15,200	\$6,300	\$2,400	\$74,300
Total	\$280,800	\$233,000	\$246,000	\$232,900	\$98,700	\$37,000	\$1,128,300

* Partial year data

Note: Details may not add to totals due to rounding.

Source: SC Film Commission, IMPLAN and AECOM

Total Economic and Fiscal Impacts

In conclusion, South Carolina paid \$21 million in rebates to film and television companies for in-state spending on goods, services and wages. In return, state and local governments received \$6.6 million in tax revenues. For every \$100 spent on wage and supplier rebates, \$31 came back in the form of taxes, a net loss as is the case with many other film incentive programs in the U.S. However, every \$100 in total rebates also generated \$410 in total economic output (i.e., sales at state businesses) and \$230 in wages to South Carolina residents as shown below.

Table 19 – Impacts Attributed to Film and Television Productions Since 2007

	Type of Impact		
	Incentivized	Non- incentive	Total
Economic Impacts			
Total Output (millions)	\$60.2	\$26.7	\$86.9
Full-Time Equivalent Jobs	1,380	230	1,610
Wages (millions)	\$42.3	\$6.1	\$48.5
Net Fiscal Cost (millions)			
Fiscal Impacts	\$5.4	\$1.1	\$6.6
Rebate	\$21.0	\$0.0	\$21.0
Net Fiscal Cost	-\$15.5	+\$1.1	-\$14.4

FTE = Full-time equivalent

Note: Totals may not add due to rounding

Sources: SC Film Commission, IMPLAN and AECOM

In looking at the supplier rebate, the total economic impact relative to the rebate is 3.695. That is, for every \$100 spent on supplier rebate, state businesses generate \$369.50 in sales. This compares to 3.76 and 3.68 in the previous analyses.

These rebates generated enough economic activity to support 790 full-time equivalent jobs in South Carolina. This is in addition to the 820 FTE jobs for residents on production. For every 10 FTE jobs on qualified television and film productions in South Carolina, 9.6 FTEs were supported in other sectors of the state's economy. Since 2007, it has cost the State of South Carolina approximately \$13,000 in rebates per full-time equivalent job supported.



04

Additional Issues for Consideration

AECOM was requested to explore a selected number of issues ancillary to the economic impact analysis that is the focus of this report. While some issues can be more directly addressed than others AECOM documents estimates and responses to the issues in this section of the report. The key areas of focus and questions involve:

- Exploration of the impact of the Sales and Use Tax exemption for film production;
- Potential impact of a change on policy regarding FSO's;
- How, if at all, tourism spending an impact can be accounted for in film analysis;
- How the South Carolina film incentive program compares to other competitive states;
- The South Carolina Film Commission and incentives.

Sales and Use Tax Exemption

Currently, qualifying productions may be eligible for a sales and use tax exemption. Based on AECOM's economic and fiscal impact analysis of the nine productions above, AECOM estimates that South Carolina would have received \$304,000 in state sales tax and \$23,000 in local sales tax revenue since 2007 if this were revoked.

Withholding Tax Policy Change

According to the current legislation, wages paid to individuals on qualified productions through Personal Service Corporations and Loan Out Companies are subject to a maximum withholding rate of 2 percent. Typically these arrangements are for above-the-line earners such as directors, producers and headliners. For the nine productions included in this analysis, the 250 individuals paid through this arrangement



earned \$19.9 million in wages and paid \$388,600 in withholding tax, 2 percent. The table below presents how this amount of revenue for the State would change if this rate were increased. If the \$19.9 million in wages had been subject to the maximum personal income tax rate of 7 percent, the State of South Carolina would have received nearly \$1.4 million, almost \$1 million more in revenue than it actually collected for these productions.

Table 20 – Potential Withholding Tax

Proposed Rate	Withholding Amount	Additional Revenue
3%	\$593,900	\$205,300
4%	\$791,800	\$403,200
5%	\$989,800	\$601,200
6%	\$1,187,800	\$799,200
7%	\$1,385,700	\$997,100

Source: SC Film Commission and AECOM

Tourism Spending and Impact(s)

It is often stated that one beneficiary of film production is the tourism industry. This is both true and difficult to quantify given constraints in available data in most states. There are two primary benefits to the tourism industry which have different constraints when attempting to quantify:

1. The economic impact of production workers in the state;
2. The economic impact of visits generated as a result of the publicity generated when the film is distributed.

The first impact is accounted for in this analysis and in most film industry analyses provided that some estimate is made for out-of-state workers spending a portion of income on local activities while working in the state. This number is typically significantly lower than the overall wage the worker generates from the production and ranges depending on the place and type of production. In this report the expenditure was based on a recent survey by the South Carolina Film Commission of crew members working on a local production.

The second type of impact is much more difficult and costly to estimate which is why it is generally beyond the scope of traditional film impact analyses. Nevertheless, there is often a value associated with publicity and promotion of a place that is unaccounted for – particularly when the place has an integral role in the plot and story development. Some analyses attempt to estimate this through trips to places clearly associated with a film, then tying back all visitor expenditures to the number of visits to the attraction. However, this method is inaccurate as it assumes that the trip's primary motivating factor was the attraction, whereas attractions are often secondary motivating factors in the decision to make a trip. Further, attraction visits are typically comprised of a combination of resident and tourist visits. In AECOM's view the best method for estimating the tourism value of this activity can be achieved through estimating a cost of advertisement equivalent to the visibility of the place as a result of the production activity in media – number of media mentions of the state or city, talk-show conversations revolving around the place of production, etc. While documenting such events is a somewhat costly and labor



intensive exercise it has more clear and readily available benchmarks for valuation – advertizing costs per impressions and the audience exposure of the film itself.

As is the case with most film industry impact studies, such an analysis was beyond the scope of this exercise. However, it's important to note that the South Carolina Film Commission is working with Tourism officials to survey and estimate the potential impact of film productions on visitor spending. This data may be used to improve the understanding of film production impacts on the tourism economy of South Carolina. In any event, it is reasonable to assume that some amount of tourism value – not accounted for here – is derived from production activity, though that ultimate amount is unknown at this point.

South Carolina Film Commission

The South Carolina Film Commission maintains several support and promotional activities outside of incentive-related activity. A notable number of productions use South Carolina for activities that do not qualify for incentives. Such productions are typically commercial, and they are noted separately from the incentive-oriented productions in the economic and fiscal impact sections of this report. Estimates indicated annual activity in the order of \$1 million and \$5 million spent in South Carolina annually with related economic impacts of over \$26 million since 2007. The Film Commission is responsible for maintaining a database of available locations, crew, and suppliers and is responsible for working with such productions to develop and implement filming options in South Carolina.

Appendix B-1. Film Project Summary Report (Calendar Year 2007 - 2011)

Project Summary Report

All Productions

SC Film Commission

Production Start Date: 01/01/2007 - 12/31/2011

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
Feature Film										
5/13/2007	Gospel Hill	\$503,168	100	\$2,254,316.21	\$0.00	0	York Chester	1428	410	467
6/15/2007	Goodbye Victoria	\$0	50	\$0.00	\$1,100.00	0	Charleston	0	0	0
2/20/2008	The New Daughter	\$1,155,621	100	\$6,280,315.16	\$0.00	0	Charleston	3459	392	481
4/14/2008	Nailed	\$1,178,645	100	\$13,113,036.50	\$0.00	43	Richland Lexington	9987	117	269
7/1/2008	The Hills Have Thighs: An Appalachian Comedy	\$0	90	\$0.00	\$50,000.00	7	Pickens Richland	10	22	22
10/13/2008	Dear John	\$2,436,140	100	\$7,060,341.00	\$0.00	46	Charleston Berkeley	4780	965	1142
12/7/2008	George A. Romero Presents: Deadtime Stories I	\$0	70	\$0.00	\$85,000.00	12	Beaufort	200	4	16
2/22/2009	Third on a Match	\$0	100	\$0.00	\$10,000.00	40	Greenwood Abbeville	2	20	20
10/12/2009	The Afflicted	\$0	100	\$0.00	\$490,000.00	21	Greenville Spartanburg Charleston	20	50	53
10/21/2009	Angel Camouflaged	\$429,926	100	\$1,246,203.95	\$0.00	21	Charleston	383	504	571
5/24/2010	Little Red Wagon	\$765,592	100	\$2,064,789.06	\$0.00	27	Charleston	1941	878	930
7/19/2010	The Wise Kids	\$0	98	\$0.00	\$35,000.00	24	Charleston	0	39	67
9/12/2010	The Bay	\$283,864	100	\$1,279,279.00	\$0.00	18	Georgetown	2365	426	495

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
5/11/2011	Crackerjack (portion)	\$0	3	\$0.00	\$5,000.00	1	Florence	25	4	4
Totals: Feature Film		\$6,752,956		\$33,298,281	\$676,100	260		24600	3831	4537
Project Count: 14										

MOW's/Cable Movies/TV Series/Pilots

2/1/2007	Reinventing the Wheelers (Pilot)	\$714,468	100	\$3,028,184.75	\$0.00	14	Charleston	2037	353	446
2/20/2007	Army Wives - Season 1	\$2,436,231	100	\$10,764,380.04	\$0.00	84	Charleston Georgetown Bamberg Berkeley Newberry	14219	1087	1393
3/19/2008	Army Wives - Season 2	\$6,968,194	100	\$29,528,916.28	\$0.00	133	Charleston	24744	2011	2011
12/18/2008	MTV: Making The Band - Season 4	\$0	2	\$0.00	\$5,000.00	3	Greenville	10	14	16
1/7/2009	The Real Estate Pros - Season 2	\$0	100	\$0.00	\$1,500,000.00	90	Charleston	120	3	14
2/3/2009	Army Wives - Season 3	\$6,498,044	100	\$15,798,030.30	\$0.00	126	Charleston Berkeley	19389	1374	1770
5/9/2009	King of the Crown (Pilot)	\$0	100	\$0.00	\$120,000.00	5	Richland Lexington	30	2	10
7/15/2009	King of the Crown - Season 1	\$0	95	\$0.00	\$300,000.00	58	Richland Charleston	90	5	20
8/10/2009	Southern Fried Stings - Pilot (truTV)	\$0	100	\$0.00	\$50,000.00	10	Spartanburg	18	17	27
1/6/2010	Southern Fried Stings - Season 1	\$0	100	\$0.00	\$272,000.00	21	Spartanburg	94	2	18
1/13/2010	Army Wives - Season 4	\$5,695,567	100	\$16,792,183.00	\$0.00	131	Charleston	20014	1731	1927
3/22/2010	American Pickers (History Channel)	\$0	50	\$0.00	\$5,000.00	0	Lexington	0	0	0

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
7/26/2010	Southern Fried Stings - Season 2	\$0	100	\$0.00	\$272,000.00	27	Spartanburg	94	17	33
10/5/2010	The Lost Valentine (2nd unit)	\$0	1	\$0.00	\$1,000.00	0	Charleston	3	0	0
10/18/2010	Test Drive: Corvette ZR1	\$0	0	\$0.00	\$20,000.00	0	Kershaw	0	0	0
1/10/2011	Army Wives - Season 5	\$5,042,464	100	\$11,959,976.95	\$0.00	91	Charleston	2104	1348	1582
3/10/2011	All Worked Up - Season 4 (truTV)	\$0	40	\$0.00	\$8,000.00	5	Charleston	20	7	9
5/23/2011	Scammed	\$0	100	\$0.00	\$250,000.00	0	Charleston	1200	8	38
7/11/2011	Eastbound & Down (portion)	\$0	25	\$0.00	\$122,000.00	2	Horry	180	2025	2110
Totals: MOW's/Cable Movies/TV Series/Pilots 19		\$27,354,967		\$87,871,671	\$2,925,000	800		84366	10004	11424

Project Count:

Other (Student, Docs.)

1/11/2007	Leverage	\$0	100	\$0.00	\$3,000.00	0	Greenville	0	0	0
3/1/2007	True Aim- Drayton Hall Documentary	\$0	100	\$0.00	\$9,600.00	0	Charleston	0	7	7
5/16/2008	The Witch of Portobello	\$0	100	\$0.00	\$75,000.00	4	Charleston	0	110	110
5/28/2008	Stand Alone	\$0	100	\$0.00	\$450.00	0	Charleston	0	0	0
7/22/2008	Roses Are Dead	\$0	100	\$0.00	\$10,000.00	4	Anderson	2	0	0
9/4/2008	Appalachian Dreams	\$0	100	\$0.00	\$75,000.00	48	Pickens	0	0	0
9/12/2008	Dog Days	\$0	100	\$0.00	\$1,000.00	8	Richland	0	48	48
10/15/2008	A Very Cold Day	\$0	100	\$0.00	\$1,000.00	2	Jasper	0	0	0
1/10/2009	Palmetto Haunting	\$0	100	\$0.00	\$8,500.00	14	Chester York	0	12	12
3/3/2009	Liberating Jesse	\$45,000	100	\$0.00	\$0.00	16	Charleston Berkeley	1	51	51

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
6/15/2009	Eight Graves	\$0	100	\$0.00	\$3,000.00	21	Charleston Georgetown Horry	0	17	17
6/15/2009	Antigone	\$0	100	\$0.00	\$12,000.00	25	Anderson Greenville	15	50	50
7/2/2009	My America	\$0	5	\$0.00	\$7,000.00	5	Greenwood	20	0	4
8/26/2009	John Henry McCray	\$0	30	\$0.00	\$1,000.00	2	Richland Charleston	0	0	0
12/7/2009	History of Civilization	\$0	10	\$0.00	\$5,000.00	5	Charleston	12	0	3
3/3/2010	The Last Mountain	\$0	0	\$0.00	\$2,000.00	1	Charleston	0	0	0
11/4/2010	Civil War: Back to Life	\$0	8	\$0.00	\$2,600.00	2	Charleston	15	1	6
12/12/2010	Home (Pilot)	\$0	100	\$0.00	\$10,000.00	14	York	30	10	27
7/21/2011	Cold Blood	\$0	50	\$0.00	\$5,000.00	5	Aiken	18	3	6

Totals: Other (Student, Docs.)		\$45,000		\$0	\$231,150	176		113	309	341
Project Count:		19								

Print Ads & Catalogs

1/1/2007	Belk - Spring '07	\$0	100	\$0.00	\$6,600.00	0	Charleston	0	5	5
2/1/2007	Lands End - Winter '07	\$0	100	\$0.00	\$15,000.00	0	Clarendon	0	10	10
2/2/2007	Jenny K	\$0	100	\$0.00	\$39,600.00	0	Charleston	0	12	12
3/1/2007	Appleseed's - Spring '07 (part 1)	\$0	100	\$0.00	\$44,550.00	0	Charleston Beaufort	0	3	3
3/1/2007	SCDOT	\$0	100	\$0.00	\$9,900.00	0	Charleston	0	3	3
4/1/2007	Hanes - Spring '07	\$0	100	\$0.00	\$34,650.00	0	Charleston	0	5	5

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
4/1/2007	LPGA Ad	\$0	100	\$0.00	\$3,300.00	0	Charleston	0	8	8
4/1/2007	Willow Ridge	\$0	100	\$0.00	\$247,500.00	0	Charleston	0	12	12
5/1/2007	World Publications	\$0	75	\$0.00	\$14,850.00	0	Charleston	0	10	10
5/1/2007	Appleseed's - Spring '07 (part 2)	\$0	100	\$0.00	\$3,960.00	0	Charleston	0	4	4
5/14/2007	Jessica London	\$0	100	\$0.00	\$44,550.00	0	Charleston	0	5	5
6/1/2007	Stein Mart	\$0	100	\$0.00	\$2,640.00	0	Charleston	0	7	7
6/6/2007	Maxim Magazine	\$0	100	\$0.00	\$10,000.00	0	Beaufort	0	0	0
7/1/2007	Dodge Trucks	\$0	100	\$0.00	\$16,000.00	0	Horry	0	3	3
9/1/2007	Redcats USA	\$0	100	\$0.00	\$100,000.00	0	Charleston	0	11	11
10/1/2007	Bank of America - '07	\$0	100	\$0.00	\$3,750.00	0	Charleston	0	3	3
10/1/2007	Chadwicks - Redcats	\$0	100	\$0.00	\$80,000.00	0	Charleston	0	4	4
10/1/2007	Lorel	\$0	100	\$0.00	\$36,000.00	0	Charleston	0	12	12
10/9/2007	American Girl - '07	\$0	100	\$0.00	\$56,000.00	0	Beaufort	0	3	3
10/13/2007	YES Essentials (Milliken)	\$0	100	\$0.00	\$24,000.00	0	Charleston	0	12	12
10/24/2007	Teen Vogue - Fall '07	\$0	100	\$0.00	\$30,000.00	0	Charleston	0	11	11
10/24/2007	Eileen Fisher Clothing	\$0	10	\$0.00	\$56,000.00	0	Beaufort	0	5	5
10/30/2007	Bedford Fair - '07	\$0	100	\$0.00	\$40,000.00	0	Charleston	0	14	14
3/11/2008	Bedford Fair - '08	\$0	100	\$0.00	\$40,000.00	0	Charleston	0	8	8
3/23/2008	Brownstone - '08	\$0	100	\$0.00	\$50,000.00	5	Charleston	35	3	8
4/9/2008	Talbots - '08	\$0	100	\$0.00	\$75,000.00	7	Charleston	56	9	19
5/15/2008	Garden Furniture	\$0	5	\$0.00	\$10,000.00	0	Charleston	0	2	2

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
5/16/2008	Outer Banks - '08	\$0	100	\$0.00	\$20,000.00	3	Charleston	0	8	12
5/18/2008	Lowe's - Spring '08	\$0	100	\$0.00	\$30,000.00	6	Charleston	0	12	20
5/19/2008	Gloster Catalogue	\$0	100	\$0.00	\$0.00	5	Charleston	0	10	16
5/21/2008	British Outdoor Furniture	\$0	100	\$0.00	\$10,000.00	4	Charleston	30	3	8
6/15/2008	Essence Magazine - December issue	\$0	100	\$0.00	\$25,000.00	1	Charleston	40	10	50
6/15/2008	Essence	\$0	100	\$0.00	\$20,000.00	1	Charleston	0	4	11
6/18/2008	Marie Claire	\$0	100	\$0.00	\$20,000.00	0	Charleston	0	3	3
6/22/2008	Darius Rucker Album Cover	\$0	100	\$0.00	\$16,000.00	0	Charleston	0	2	2
6/24/2008	Casual Retreat	\$0	40	\$0.00	\$3,000.00	3	Charleston	16	0	4
7/20/2008	Home Depot - Summer '08	\$0	100	\$0.00	\$56,000.00	7	Charleston	0	14	26
7/23/2008	Drink Small – Music Maker Series	\$0	100	\$0.00	\$500.00	0	Richland	0	2	2
8/25/2008	Cape Fear Valley Hospital	\$0	100	\$0.00	\$22,000.00	2	Richland	0	6	6
11/5/2008	Casual Male XL Catalogue - Spring '09	\$0	100	\$0.00	\$52,000.00	10	Charleston	156	8	21
11/11/2008	Ralph Lauren Rugby Spring 09	\$0	100	\$0.00	\$50,000.00	1	Charleston	50	20	60
12/18/2008	Shelter Logic	\$0	100	\$0.00	\$15,000.00	2	Richland Lexington	12	11	13
3/17/2009	Champion Sportswear	\$0	100	\$0.00	\$62,500.00	4	Charleston	20	5	7
4/15/2009	Bedford Fair - '09	\$0	100	\$0.00	\$40,000.00	3	Charleston	54	8	11
4/27/2009	Alloy Catalogue	\$0	100	\$0.00	\$45,000.00	5	Charleston	70	3	13
5/6/2009	Appleseed's - Spring '09	\$0	100	\$0.00	\$70,000.00	10	Charleston	130	7	10

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
5/11/2009	Tommy Bahama	\$0	100	\$0.00	\$12,000.00	6	Charleston	42	0	6
6/10/2009	Gloster Furniture Ad - 09	\$0	100	\$0.00	\$25,000.00	3	Charleston	20	8	10
7/8/2009	Maxum & Bayliner Boats	\$0	100	\$0.00	\$45,500.00	12	Charleston	0	12	15
9/15/2009	Bedford Fair - Winter '09	\$0	100	\$0.00	\$10,000.00	4	Charleston	84	4	12
12/1/2009	Ann Taylor - Summer Marketing shoot	\$0	100	\$0.00	\$30,000.00	2	Charleston	24	8	20
1/19/2010	Bed Linen	\$0	100	\$0.00	\$35,000.00	2	Charleston	60	9	21
1/31/2010	Springmaid Linen	\$0	0	\$0.00	\$40,000.00	2	Charleston	50	10	19
3/24/2010	Appleseed's - Spring '10 (part 1)	\$0	100	\$0.00	\$40,000.00	9	Charleston	132	3	12
4/29/2010	Chadwicks - Spring 2010	\$0	100	\$0.00	\$75,000.00	12	Charleston	144	7	15
5/1/2010	J. Jill - Spring '10 (part 1)	\$0	100	\$0.00	\$40,000.00	7	Charleston	96	5	14
5/2/2010	Appleseed's - Spring '10 (part 2)	\$0	100	\$0.00	\$40,000.00	0	Charleston	140	3	12
5/5/2010	Chadwick's Fall 2010	\$0	100	\$0.00	\$75,000.00	9	Charleston	125	4	7
5/9/2010	James Otto	\$0	100	\$0.00	\$10,000.00	0	Charleston	0	0	0
5/10/2010	Telescope Outdoor Furniture	\$0	100	\$0.00	\$6,000.00	0	Beaufort	21	0	7
5/12/2010	Lexington Furniture - '10	\$0	80	\$0.00	\$20,000.00	6	Charleston	49	3	11
5/22/2010	J. Jill - Spring '10 (part 2)	\$0	100	\$0.00	\$40,000.00	7	Charleston	104	6	25
7/5/2010	Darius Rucker: Charleston, 1966	\$0	100	\$0.00	\$20,000.00	1	Charleston	0	2	7
7/13/2010	Queen of Hearts	\$0	80	\$0.00	\$2,000.00	0	Charleston	15	3	3
9/1/2010	Hilton Honors Program	\$0	100	\$0.00	\$30,000.00	2	Charleston	0	4	14
10/11/2010	Seventh Avenue	\$0	100	\$0.00	\$40,000.00	5	Charleston	64	9	14

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
12/8/2010	Mercedes-Benz: Sprinter	\$0	100	\$0.00	\$200,000.00	10	Charleston	170	69	79
1/5/2011	Micromass Communications - Release	\$0	100	\$0.00	\$30,000.00	3	Charleston	38	6	13
3/15/2011	Appleseed's - Spring '11	\$0	100	\$0.00	\$30,000.00	0	Charleston	80	3	21
8/11/2011	Cyber Swim	\$0	100	\$0.00	\$35,000.00	8	Charleston	112	3	18
9/13/2011	Sperry Top-Sider - Spring 2012	\$0	0	\$0.00	\$120,000.00	3	Charleston	134	23	46
10/1/2011	American Eagle - Aerie	\$0	100	\$0.00	\$70,000.00	4	Georgetown	225	12	48
10/17/2011	Florsheim	\$0	100	\$0.00	\$100,000.00	5	Charleston	56	18	26
10/28/2011	Casual Male XL- Fall 2011	\$0	100	\$0.00	\$30,000.00	7	Charleston	112	6	20
11/15/2011	Teen Vogue - Fall '11	\$0	100	\$0.00	\$45,000.00	3	Charleston	54	2	20
Totals: Print Ads & Catalogs		\$0		\$0	\$2,946,350	211		2820	562	1029
Project Count: 75										

Training/Industrials

2/1/2007	Upcountry History Museum	\$0	100	\$0.00	\$2,000.00	0	Greenville	0	3	3
8/6/2007	US Customs	\$0	100	\$0.00	\$24,750.00	0	Charleston	0	8	8
12/3/2007	The Truth About Liars	\$0	100	\$0.00	\$1,000.00	0	Richland	0	1	1
2/1/2008	Air Force Promo	\$0	15	\$0.00	\$6,600.00	0	Sumter	0	1	1
3/10/2008	BMW - Competitive Forum	\$0	100	\$0.00	\$23,024.00	5	Spartanburg	50	16	26
5/3/2008	Michelin Tires	\$0	100	\$0.00	\$16,500.00	0	Laurens	0	18	18
6/16/2008	Myrtle Beach Chamber Promo	\$0	100	\$0.00	\$10,000.00	6	Horry	0	2	20
9/2/2008	BMW - Advance Diesel Roadtrip	\$0	100	\$0.00	\$18,906.00	5	Spartanburg	5	13	20
9/28/2008	BMW - MINI Competitive Forum	\$0	100	\$0.00	\$20,109.00	5	Spartanburg	5	12	19

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
12/15/2008	Colonial Life - Web Campaign	\$0	100	\$0.00	\$80,000.00	8	Newberry Richland	6	25	27
3/25/2009	Visual Artistry	\$0	100	\$0.00	\$6,000.00	3	Charleston	4	2	4
4/3/2009	Ninety Six	\$0	40	\$0.00	\$12,000.00	3	Greenwood	18	4	10
12/2/2009	Schneider National	\$0	6	\$0.00	\$1,500.00	1	Jasper	0	5	8
9/10/2010	Nutrisystem	\$0	100	\$0.00	\$1,800.00	2	Charleston	12	3	7
4/4/2011	Proactiv Web	\$0	100	\$0.00	\$20,000.00	1	Charleston	8	16	20

Totals: Training/Industrials**\$0****\$0****\$244,189****39****108****129****192**Project Count: **15****TV Commercials**

1/1/2007	CBIZ Insurance	\$0	100	\$0.00	\$11,550.00	0	Charleston	0	9	9
2/1/2007	Army Wives Gives Back	\$0	40	\$0.00	\$75,000.00	2	Charleston	20	10	60
3/1/2007	Nikon "Picture Town"	\$0	100	\$0.00	\$44,550.00	0	Georgetown	0	8	8
3/1/2007	Palmetto Pride PSA spots	\$0	100	\$0.00	\$30,000.00	0	Richland	0	5	5
3/1/2007	Veet	\$0	100	\$0.00	\$59,400.00	0	Charleston	0	40	40
3/1/2007	All Fall Down (EPK)	\$0	20	\$0.00	\$13,200.00	0	Charleston	0	3	3
3/1/2007	DIY	\$0	100	\$0.00	\$74,250.00	0	Beaufort	0	17	17
3/1/2007	German Travel Channel	\$0	75	\$0.00	\$9,900.00	0	Charleston	0	3	3
3/1/2007	Canadian Soccer Team/Bank of Montreal	\$0	100	\$0.00	\$57,750.00	0	Charleston	0	60	60
3/1/2007	Medical Product	\$0	100	\$0.00	\$14,850.00	0	Charleston	0	8	8
3/2/2007	BMW	\$0	90	\$0.00	\$333,000.00	0	Greenville	0	18	18
4/1/2007	Reverie Condos	\$0	100	\$0.00	\$8,250.00	0	Charleston	0	8	8

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
4/17/2007	SC Dept. of Agriculture - '07	\$0	100	\$0.00	\$15,000.00	0	Richland	0	7	7
5/10/2007	Quicken Loans	\$0	100	\$0.00	\$26,400.00	0	Charleston	0	10	10
8/1/2007	Chevrolet	\$0	100	\$0.00	\$247,500.00	0	Chester	0	35	35
8/1/2007	Pandemic	\$0	100	\$0.00	\$49,500.00	0	Richland	0	20	20
8/17/2007	National Highway, Safety Admin	\$0	100	\$0.00	\$8,250.00	0	Charleston	0	6	6
10/1/2007	MUSC Commercial	\$0	100	\$0.00	\$13,200.00	0	Charleston	0	30	30
12/8/2007	BMW - Running Footage	\$0	60	\$0.00	\$24,750.00	3	Greenville	0	2	2
1/25/2008	GMC "Bridge"	\$0	100	\$0.00	\$115,500.00	0	Charleston	0	45	45
3/10/2008	BOSE - True to Life	\$0	100	\$0.00	\$42,900.00	3	Charleston	0	19	38
3/14/2008	Citgo (4 spots)	\$0	100	\$0.00	\$1,190,000.00	7	Dorchester Newberry	400	49	70
5/30/2008	Ford / Susan G Komen Foundation "Warriors in Pink"	\$0	15	\$0.00	\$32,800.00	0	Charleston	0	30	30
9/26/2008	Ketner for Congress	\$0	100	\$0.00	\$15,000.00	1	Charleston	9	7	10
10/11/2008	Taste of Charleston	\$0	100	\$0.00	\$5,000.00	2	Charleston	6	3	6
10/26/2008	Jeffcoat Attorney Ad	\$0	100	\$0.00	\$12,000.00	1	Lexington	2	8	9
12/12/2008	Futuristic Films Commercial	\$0	100	\$0.00	\$10,000.00	1	Greenville	6	0	0
12/16/2008	Toyota Venza	\$0	100	\$0.00	\$125,000.00	3	Charleston	45	20	23
3/30/2009	Carolina First Bank "Open"	\$0	100	\$0.00	\$70,000.00	2	Charleston Greenville	0	11	18
4/21/2009	Bone Mineral Density	\$0	100	\$0.00	\$12,000.00	1	Georgetown	2	8	10
5/20/2009	Roper Hospital - "Love Hurts"	\$0	100	\$0.00	\$35,000.00	0	Charleston	10	13	15

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
6/14/2009	Marines	\$0	100	\$0.00	\$401,016.00	4	Beaufort Calhoun	200	36	58
7/30/2009	SC Dept. of Agriculture - '09	\$0	100	\$0.00	\$80,000.00	2	Charleston Orangeburg	42	43	49
8/25/2009	Honda "Chains"	\$0	40	\$0.00	\$175,000.00	1	Charleston Berkeley	30	53	58
11/5/2009	SCPRT - Made for Vacation (& Golf)	\$0	100	\$0.00	\$450,000.00	10	Beaufort Charleston Horry Richland Lexington Greenville Anderson Spartanburg	210	25	31
1/14/2010	Kobalt Tools (Web)	\$0	30	\$0.00	\$20,000.00	1	Chester	26	7	46
1/15/2010	Joe Wilson for Congress	\$0	100	\$0.00	\$10,000.00	1	Richland	0	2	6
4/7/2010	Eleanor Kitman for Lt. Governor	\$0	0	\$0.00	\$28,000.00	0	Richland	0	10	13
4/26/2010	Crestor - '10	\$0	0	\$0.00	\$60,000.00	0	Georgetown	0	7	17
6/14/2010	MUSC - '10	\$0	100	\$0.00	\$125,000.00	7	Charleston	19	27	39
6/23/2010	BMW - Rewind (2 spots)	\$0	100	\$0.00	\$185,000.00	3	Richland Spartanburg Greenville	130	33	78
6/23/2010	US Cellular	\$0	0	\$0.00	\$75,000.00	0	Charleston	0	0	0
7/13/2010	Charter Communications	\$0	100	\$0.00	\$20,000.00	0	Greenville	0	2	6
7/15/2010	Gander Mountain	\$0	100	\$0.00	\$10,000.00	0	York	0	0	0

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
8/23/2010	Celebrex	\$0	0	\$0.00	\$50,000.00	0	Georgetown	60	0	0
9/9/2010	Best Western	\$0	0	\$0.00	\$20,000.00	0	Greenville	20	5	15
10/5/2010	Bluegreen - Myrtle Beach	\$0	100	\$0.00	\$15,000.00	6	Horry	9	8	13
10/18/2010	Corvette Test Drive	\$0	100	\$0.00	\$35,000.00	0	Lancaster	40	0	0
11/22/2010	Bi-Lo (2010)	\$0	0	\$0.00	\$20,000.00	0	Greenville	15	5	5
2/3/2011	First Federal	\$0	100	\$0.00	\$70,000.00	2	Charleston	26	44	52
5/18/2011	Bi-Lo (2011)	\$0	100	\$0.00	\$20,000.00	2	Greenville	65	21	65
9/5/2011	Army of One - '11	\$0	0	\$0.00	\$50,000.00	5	Richland	30	13	23
10/10/2011	Army Wives - Promo for Season 6	\$0	100	\$0.00	\$101,000.00	1	Charleston	20	49	67
10/10/2011	Belk - Fall '11	\$0	100	\$0.00	\$250,000.00	0	Charleston	35	8	31
10/14/2011	Pharmaceutical Product	\$0	100	\$0.00	\$35,000.00	2	Charleston	36	18	22
10/31/2011	Lincoln Financial	\$0	100	\$0.00	\$100,000.00	5	Charleston	35	50	55
Totals: TV Commercials		\$0		\$0	\$5,186,516	78		1548	978	1372
Project Count: 56										

TV Episodes/Music Videos

1/1/2007	Retirement Living TV	\$0	100	\$0.00	\$4,558.00	0	Charleston	0	3	3
1/1/2007	Wheel of Fortune	\$0	100	\$0.00	\$2,000,000.00	0	Charleston	0	250	250
1/1/2007	House Hunters - '07	\$0	100	\$0.00	\$41,250.00	0	Horry	0	5	5
1/1/2007	Wheel of Fortune (B Roll)	\$0	100	\$0.00	\$8,250.00	0	Charleston	0	4	4
1/1/2007	Extreme Makeover	\$0	100	\$0.00	\$82,500.00	0	Horry	0	45	45
2/1/2007	Flip This House	\$0	100	\$0.00	\$49,500.00	0	Richland	0	7	7

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
2/1/2007	I Want That	\$0	100	\$0.00	\$23,000.00	0	Charleston	0	3	3
2/1/2007	America's Most Wanted - '07 (Fox)	\$0	100	\$0.00	\$7,408.00	0	Florence	0	2	2
2/12/2007	Bunco	\$0	100	\$0.00	\$2,000.00	0	Richland	0	4	4
3/14/2007	Anthony Bourdain: No Reservations	\$0	100	\$0.00	\$16,500.00	7	Charleston	0	2	2
4/1/2007	Painless Production- Animal Planet	\$0	100	\$0.00	\$49,015.00	0	Charleston	0	11	11
4/1/2007	Family Circle Tennis	\$0	100	\$0.00	\$115,500.00	0	Charleston	0	100	100
4/1/2007	Democratic Debates	\$0	100	\$0.00	\$165,000.00	0	Orangeburg	0	37	37
5/1/2007	Digging for the Truth: Episode 43	\$0	100	\$0.00	\$44,550.00	0	Charleston	0	1	1
5/5/2007	Wives on the Homefront	\$0	100	\$0.00	\$30,000.00	0	Charleston	0	25	25
6/2/2007	LPGA Tour	\$0	100	\$0.00	\$148,500.00	0	Charleston	0	35	35
7/18/2007	CBS Early Show	\$0	100	\$0.00	\$100,000.00	0	Charleston	0	7	7
8/16/2007	American Idol - Season 7 / Episode 4 (Fox)	\$0	10	\$0.00	\$135,000.00	3	Charleston	160	50	70
8/25/2007	CNBC	\$0	100	\$0.00	\$7,260.00	0	Charleston	0	3	3
9/1/2007	Sugarland Express	\$0	100	\$0.00	\$24,750.00	0	Charleston	0	28	28
9/1/2007	Pirates	\$0	100	\$0.00	\$3,960.00	0	Charleston	0	4	4
9/13/2007	Battle of Saipan	\$0	100	\$0.00	\$34,650.00	0	Charleston	0	10	10
10/1/2007	Political Capitol - Bloomberg McCain Interview	\$0	100	\$0.00	\$15,000.00	0	Charleston	0	1	1
10/4/2007	Political Capitol	\$0	100	\$0.00	\$15,000.00	0	Charleston	0	1	1
10/21/2007	Stephen Fry in America	\$0	10	\$0.00	\$300.00	2	Beaufort	0	1	1

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
11/1/2007	HGTV: Green Home 2008	\$0	100	\$0.00	\$130,000.00	0	Beaufort	0	120	120
11/9/2007	HGTV: If Walls Could Talk	\$0	100	\$0.00	\$5,000.00	0	Beaufort	0	0	0
1/1/2008	Democratic Presidential Debate	\$0	100	\$0.00	\$330,000.00	0	Horry	0	50	50
1/1/2008	The Colbert Report	\$0	100	\$0.00	\$16,500.00	0	Charleston	0	4	4
1/1/2008	Republican Presidential Debate	\$0	100	\$0.00	\$24,750.00	0	Horry	0	50	50
1/29/2008	For Love of Money: The Seale Kidnapping	\$0	100	\$0.00	\$1,000.00	0	Beaufort	0	2	2
3/15/2008	Throwdown with Bobby Flay	\$0	60	\$0.00	\$18,000.00	3	Charleston	27	10	19
4/12/2008	The Amazing Race - Spring '08	\$0	5	\$0.00	\$1,000.00	0	Richland	6	0	3
5/1/2008	Last Comic Standing	\$0	5	\$0.00	\$8,250.00	0	Richland	0	4	4
5/6/2008	The Biggest Loser - Season 6	\$0	10	\$0.00	\$5,000.00	0	Greenville	0	3	3
8/12/2008	Golf With Style	\$0	100	\$0.00	\$10,000.00	3	Beaufort	36	2	8
8/15/2008	School Of Golf - Hilton Head (Golf Channel)	\$0	85	\$0.00	\$200,000.00	30	Beaufort	150	2	8
9/23/2008	The Biggest Loser - Season 7	\$0	5	\$0.00	\$5,000.00	1	Horry	3	1	7
10/4/2008	Pachino Dino Music Video	\$0	100	\$0.00	\$10,000.00	0	Richland	3	15	16
10/16/2008	The Amazing Race - Fall '08	\$0	5	\$0.00	\$1,000.00	0	Richland	6	0	3
12/2/2008	Aerial America	\$0	2	\$0.00	\$2,000.00	3	Charleston Richland Sumter Greenville	6	0	3
12/18/2008	Exotical Pants	\$0	100	\$0.00	\$36,000.00	0	Richland	2	12	12
3/30/2009	History Detectives - "Columbia Bridge"	\$0	100	\$0.00	\$25,000.00	5	Richland	10	0	0

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
4/7/2009	Horse Master with Julie Goodnight (RFD-TV)	\$0	15	\$0.00	\$3,600.00	3	Beaufort	12	0	4
4/15/2009	Deadly Women: Mothers Who Kill	\$0	1	\$0.00	\$300.00	1	Union	3	2	5
5/7/2009	Caravallo's Journey (PBS)	\$0	100	\$0.00	\$20,000.00	2	Charleston	0	0	0
7/6/2009	I Shouldn't Be Alive III	\$0	20	\$0.00	\$10,000.00	2	Charleston	15	0	0
7/16/2009	Hunley (National Geographic)	\$0	99	\$0.00	\$60,000.00	20	Charleston	23	8	13
7/19/2009	Rob Drydeck's Fantasy Factory	\$0	10	\$0.00	\$20,000.00	5	Horry	85	0	17
8/18/2009	Around the World in 80 Days	\$0	25	\$0.00	\$2,500.00	1	Lee	15	6	16
9/1/2009	Donnavventura (Rete 4 - Italy)	\$0	10	\$0.00	\$2,000.00	1	Charleston	8	0	2
9/7/2009	Supernanny (ABC)	\$0	100	\$0.00	\$80,000.00	21	Florence	323	5	24
9/10/2009	The Hunley (National Geographic TV)	\$0	100	\$0.00	\$45,000.00	20	Charleston	23	8	13
9/14/2009	God in America	\$0	15	\$0.00	\$5,000.00	0	Charleston York	12	0	0
10/9/2009	uCook! With Chef Bob	\$0	100	\$0.00	\$50,000.00	4	Charleston	0	13	13
10/25/2009	Destination Golf - South Carolina	\$0	100	\$0.00	\$20,000.00	6	Charleston Horry Beaufort	20	2	5
11/16/2009	Dispatches (Channel 4, UK)	\$0	5	\$0.00	\$2,000.00	2	Richland York	2	1	2
2/23/2010	Women Behind Bars - Season 2 (WEtv)	\$0	5	\$0.00	\$1,000.00	0	Spartanburg	3	0	3
3/15/2010	Animal Planet	\$0	50	\$0.00	\$20,000.00	3	Charleston	20	8	11
3/18/2010	ACC Football promo	\$0	100	\$0.00	\$10,000.00	0	Oconee	4	0	0

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
3/21/2010	NFL Draft: 2010	\$0	10	\$0.00	\$2,000.00	2	Pickens Greenville	6	1	4
4/6/2010	Discovery Health: Mystery Diagnosis	\$0	50	\$0.00	\$10,000.00	4	Sumter	4	2	5
5/12/2010	I'm Heavy	\$0	100	\$0.00	\$354,705.00	0	Beaufort	0	0	0
5/15/2010	50 Cent: The Origin of Me	\$0	20	\$0.00	\$50,000.00	2	Edgefield	6	2	6
5/15/2010	Charleston Riverdogs / ESPN	\$0	100	\$0.00	\$20,000.00	0	Charleston	10	0	0
5/28/2010	Tainted Love	\$0	75	\$0.00	\$6,000.00	3	Cherokee	5	5	9
7/1/2010	Jersey Shore - Episode 1 "Going South"	\$0	5	\$0.00	\$4,000.00	0	Dillon	12	0	0
7/3/2010	Hollywood Cycles (TruTV)	\$0	100	\$0.00	\$6,500.00	3	Aiken	22	4	9
7/15/2010	Teen Mom	\$0	5	\$0.00	\$2,000.00	0	Horry	6	2	2
9/20/2010	Who Do You Think You Are?	\$0	10	\$0.00	\$6,000.00	1	Charleston	10	0	5
9/23/2010	The Biggest Looser - Where are They Now?	\$0	25	\$0.00	\$70,000.00	0	Greenville Horry	12	2	2
10/14/2010	HGTV: "My First Sale"	\$0	4	\$0.00	\$2,000.00	14	Spartanburg	0	2	5
2/18/2011	Born to Kill	\$0	12	\$0.00	\$2,000.00	4	Charleston Florence Richland	10	8	10
2/20/2011	Plum Hollow Farm	\$0	0	\$0.00	\$50,000.00	9	Spartanburg	72	3	9
3/7/2011	The Bachelor	\$0	25	\$0.00	\$10,000.00	0	Lexington	12	3	3
3/10/2011	You Don't Know Dixie	\$0	100	\$0.00	\$35,000.00	12	Spartanburg	150	9	18
3/15/2011	Coming Home	\$0	15	\$0.00	\$65,000.00	12	Charleston	133	32	45

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
4/15/2011	Hulk Hogan's Micro Championship Wrestling	\$0	25	\$0.00	\$5,000.00	0	Charleston	8	2	2
4/16/2011	This Morning	\$0	100	\$0.00	\$3,000.00	0	Charleston	20	3	3
5/1/2011	The Unsellables 3 (HGTV)	\$0	40	\$0.00	\$33,000.00	26	Charleston Colleton	450	11	23
5/13/2011	Golf	\$0	100	\$0.00	\$20,000.00	1	Horry	20	7	12
5/18/2011	Treasure Chase - Episode 102 (Discovery)	\$0	0	\$0.00	\$30,000.00	2	Charleston	42	10	30
7/14/2011	Requiem For The Blessed Damned	\$0	100	\$0.00	\$400.00	1	Richland	3	7	9
7/14/2011	Your Chance to Die	\$0	100	\$0.00	\$400.00	1	Richland	1	7	10
7/20/2011	Crimes of Passion	\$0	40	\$0.00	\$7,000.00	0	Horry	6	4	7
7/22/2011	American Idol - Season 11 / Epsiode 1 (Fox)	\$0	10	\$0.00	\$130,000.00	5	Charleston	130	45	65
8/25/2011	Hidden Gems	\$0	100	\$0.00	\$110,000.00	2	Greenville	18	14	16
8/26/2011	Hairy Bikers	\$0	8	\$0.00	\$10,000.00	6	Charleston Florence	54	25	36
9/15/2011	Sleepin' On Me	\$0	100	\$0.00	\$5,500.00	0	Charleston	0	20	20
10/3/2011	Car Lot Cowboy	\$0	12	\$0.00	\$40,000.00	6	Anderson	265	17	36
10/15/2011	Ghost Adventures - Season 6	\$0	100	\$0.00	\$20,000.00	5	Charleston	56	3	14
11/4/2011	Stolen Voices, Buried Secrets	\$0	70	\$0.00	\$5,200.00	5	Richland Greenville	21	17	20
11/25/2011	Newlyweds	\$0	100	\$0.00	\$45,000.00	3	Richland	50	7	30
12/2/2011	My Versa Road Trip	\$0	25	\$0.00	\$2,000.00	0	Greenville	6	0	8
12/6/2011	Park Secrets: Swamp Thing	\$0	2	\$0.00	\$500.00	1	Charleston	2	0	2

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
12/19/2011	Heavy on a Harley	\$0	100	\$0.00	\$5,000.00	3	Richland Lexington	16	5	8
Totals: TV Episodes/Music Videos		\$0		\$0	\$5,470,556	281		2615	1246	1582
Project Count: 96										
Grand Total		\$34,152,923		\$121,169,952	\$17,679,861	1845		116170	17059	20477

Appendix B-2. Film Project Summary Report (Calendar Year 2012)

Project Summary Report

All Productions

SC Film Commission

Production Start Date: 01/01/2012 - 12/31/2012

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
Feature Film										
9/17/2012	Southern Comfort	\$0	82	\$0.00	\$80,000.00	9	Charleston	100	15	20
10/14/2012	Warrior Road	\$0	100	\$0.00	\$350,000.00	29	Charleston Horry	325	65	83
Totals: Feature Film		\$0		\$0	\$430,000	38		425	80	103
Project Count:		2								
MOW's/Cable Movies/TV Series/Pilots										
1/7/2012	Army Wives - Season 6	\$8,992,810	100	\$22,698,467.30	\$0.00	161	Charleston	4688	2290	2833
3/1/2012	Southern Nights (Season 1 / CMT)	\$0	1	\$0.00	\$3,000.00	2	Fairfield Richland	35	0	35
7/23/2012	Banshee - Season 1 (portion)	\$0	3	\$0.00	\$150,000.00	3	Richland	300	0	0
8/15/2012	Welcome to Myrtle Manor - Season 1	\$0	100	\$0.00	\$3,000,000.00	58	Horry	2070	34	57
9/15/2012	The African Americans: Many Rivers to Cross	\$0	20	\$0.00	\$50,000.00	0	Charleston Richland	45	5	10
11/6/2012	Homeland - Season 2 (portion)	\$0	5	\$0.00	\$80,000.00	1	Charleston	120	5	65
Totals: MOW's/Cable Movies/TV Series/Pilots		\$8,992,810		\$22,698,467	\$3,283,000	225		7258	2334	3000
Project Count:		6								
Other (Student, Docs.)										
2/17/2012	The Restless	\$0	0	\$0.00	\$5,000.00	3	Darlington	18	4	26
3/15/2012	Crossing the River	\$0	100	\$0.00	\$13,000.00	4	Kershaw Sumter	12	30	39

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
5/23/2012	About Face	\$0	10	\$0.00	\$5,000.00	2	Charleston	9	1	4
12/2/2012	Music Documentary	\$0	5	\$0.00	\$2,000.00	3	Charleston	3	0	0
Totals: Other (Student, Docs.)		\$0		\$0	\$25,000	12		42	35	69
Project Count: 4										

Print Ads & Catalogs

3/5/2012	Lexington Home Brands - '12	\$0	100	\$0.00	\$20,000.00	5	Charleston	48	0	8
3/13/2012	Woman Within - Spring '12 (Part 1)	\$0	100	\$0.00	\$20,000.00	4	Charleston	85	2	20
4/2/2012	Woman Within - Spring '12 (Part 2)	\$0	100	\$0.00	\$40,000.00	8	Charleston	90	2	20
4/11/2012	Distinctive Apparel - Spring '12	\$0	100	\$0.00	\$40,000.00	4	Charleston	28	4	10
4/16/2012	Adcetris	\$0	100	\$0.00	\$25,000.00	2	Beaufort	49	6	20
5/14/2012	Trek Bikes: Lifestyle	\$0	100	\$0.00	\$15,000.00	4	Charleston	72	4	13
5/31/2012	Woman Within - Summer '12 (Part 1)	\$0	100	\$0.00	\$50,000.00	5	Charleston	100	7	19
6/11/2012	Belk - WK32 Fall Look Book	\$0	100	\$0.00	\$100,000.00	7	Charleston	152	15	34
6/11/2012	Belk - Fall '12 (Look Book)	\$0	100	\$0.00	\$100,000.00	0	Charleston	200	10	37
6/11/2012	WK32 Fall Look Book	\$0	100	\$0.00	\$100,000.00	6	Charleston	24	15	26
6/18/2012	Lowe's - Summer '12	\$0	100	\$0.00	\$80,000.00	0	Charleston	250	4	29
7/24/2012	Woman Within - Summer '12 (Part II)	\$0	100	\$0.00	\$40,000.00	5	Charleston	90	2	19
8/24/2012	Woman Within - Summer '12 (Part III)	\$0	100	\$0.00	\$55,000.00	5	Charleston	85	2	19
9/5/2012	Albion	\$0	100	\$0.00	\$8,000.00	0	Charleston	33	0	0
9/27/2012	RedCats USA - Fall '12 part 1	\$0	100	\$0.00	\$50,000.00	7	Charleston	70	4	20

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
10/10/2012	Simponi	\$0	100	\$0.00	\$55,000.00	0	Charleston	120	11	18
10/25/2012	Woman Within - Fall '12	\$0	100	\$0.00	\$45,000.00	7	Charleston	100	5	25
11/7/2012	Belk - Fall '12 (Bowl Petals)	\$0	100	\$0.00	\$200,000.00	2	Charleston	250	37	66
12/3/2012	Caterpillar	\$0	90	\$0.00	\$40,000.00	3	Charleston	40	13	25
Totals: Print Ads & Catalogs		\$0		\$0	\$1,083,000	74		1886	143	428
Project Count: 19										

TV Commercials

2/15/2012	MUSC - '12	\$0	100	\$0.00	\$70,000.00	0	Charleston	120	15	25
6/17/2012	Get Zike	\$0	100	\$0.00	\$42,000.00	0	Greenville	60	25	33
12/18/2012	SC Education Lottery - Know the Numbers	\$0	100	\$0.00	\$40,000.00	1	Richland	18	15	23
Totals: TV Commercials		\$0		\$0	\$152,000	1		198	55	81
Project Count: 3										

TV Episodes/Music Videos

1/17/2012	Built to Last	\$0	25	\$0.00	\$1,000.00	0	Charleston	4	6	8
1/20/2012	Piers Morgan Tonight	\$0	100	\$0.00	\$15,000.00	1	Charleston	15	1	6
2/6/2012	Ghost Hunters - A Serial Killer's Revenge	\$0	9	\$0.00	\$42,000.00	2	Charleston	24	5	14
3/4/2012	Southern Fried Fitness	\$0	25	\$0.00	\$5,000.00	3	Charleston	15	0	5
3/5/2012	Capella Raise the Bar	\$0	100	\$0.00	\$8,000.00	2	Charleston	27	2	11
3/5/2012	Fact or Faked: Paranormal Files	\$0	100	\$0.00	\$10,000.00	3	Lee	75	3	18
3/15/2012	P. Watts - Get it Right	\$0	100	\$0.00	\$700.00	3	Orangeburg	6	8	11
4/2/2012	Deadly 60	\$0	30	\$0.00	\$3,000.00	2	Charleston	18	0	6

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
4/4/2012	History Detectives - "Bill of Sale"	\$0	100	\$0.00	\$6,000.00	3	Marion Florence Charleston	12	2	6
4/13/2012	The Devil You Know (Investigation Discovery)	\$0	15	\$0.00	\$3,000.00	1	Greenville	4	3	8
5/11/2012	NASCAR - Que Piensan Los Hombres	\$0	100	\$0.00	\$10,000.00	1	Darlington	7	4	11
6/1/2012	Teen Mom -Season 4 (MTV)	\$0	25	\$0.00	\$3,000.00	3	Horry	5	3	8
6/4/2012	World's Weirdest	\$0	2	\$0.00	\$5,000.00	1	Charleston	9	0	3
6/6/2012	Billion Dollar Block	\$0	100	\$0.00	\$10,000.00	0	Charleston	32	2	8
7/14/2012	Hoarders (A&E)	\$0	100	\$0.00	\$15,000.00	5	Greenville	78	15	25
7/17/2012	Shipping Wars (A&E)	\$0	10	\$0.00	\$5,000.00	1	Charleston	2	5	6
7/26/2012	Mysteries at the Museum	\$0	25	\$0.00	\$20,000.00	4	Florence Richland	12	18	21
8/1/2012	Untitled Beauty Project	\$0	100	\$0.00	\$35,000.00	0	Lexington Anderson	50	7	18
8/6/2012	Untitled Beauty Show	\$0	100	\$0.00	\$60,000.00	0	Lexington Anderson	30	0	0
9/10/2012	Make Your Mark	\$0	2	\$0.00	\$2,000.00	0	Spartanburg	2	0	0
9/13/2012	Outdoors with Joey Mines	\$0	100	\$0.00	\$3,000.00	1	Darlington	5	1	4
10/19/2012	Surviving Evil (ep. 3 & 5)	\$0	60	\$0.00	\$5,000.00	0	Richland	9	6	14
10/29/2012	Destination Tennis - South Carolina	\$0	100	\$0.00	\$70,000.00	5	Charleston	72	5	21
11/1/2012	Picture Frame Project	\$0	10	\$0.00	\$10,000.00	2	Richland York	72	3	21

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
11/21/2012	All You Can Eat	\$0	5	\$0.00	\$5,000.00	1	Greenville Richland	6	2	5
12/19/2012	House Hunters International - '12	\$0	50	\$0.00	\$1,000.00	1	Charleston	6	2	5
12/19/2012	House Hunters - '12	\$0	50	\$0.00	\$1,000.00	1	Charleston	6	2	5
12/26/2012	MTV: Made	\$0	60	\$0.00	\$25,000.00	30	Edgefield	90	1	4
Totals: TV Episodes/Music Videos		\$0		\$0	\$378,700	76		693	106	272
Project Count: 28										
Grand Total		\$8,992,810		\$22,698,467	\$5,351,700	426		10502	2753	3953

Appendix B-3. Film Project Summary Report (Calendar Year 2013 - 2017)

Project Summary Report

All Productions

SC Film Commission

Production Start Date: 01/01/2013 - 12/31/2017

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
Feature Film										
9/9/2013	Athena, The Goddess of War	\$0	25	\$0.00	\$10,000.00	4	Spartanburg York	2	12	42
9/30/2013	Elbow Grease	\$0	100	\$0.00	\$117,000.00	20	Oconee	600	38	74
9/29/2014	Ivy League Farmer	\$257,985	100	\$597,695.85	\$0.00	20	Charleston Berkeley Georgetown Bamberg Newberry	361	197	241
10/14/2014	Detours (portion)	\$0	1	\$0.00	\$8,000.00	1	Horry	44	0	22
10/28/2014	Magic Mike XXL (portion)	\$0	10	\$0.00	\$70,000.00	3	Horry	900	40	40
12/1/2014	Tinker (portion)	\$0	20	\$0.00	\$75,000.00	3	Greenville	10	2	20
5/4/2015	Sophie & the Rising Sun	\$762,714	100	\$1,566,139.82	\$0.00	25	Charleston	985	255	300
10/12/2015	Meagen Leavey	\$854,794	25	\$1,686,444.43	\$0.00	9	Charleston	627	585	739
10/14/2015	Ghost of Alice Flagg	\$0	100	\$0.00	\$75,000.00	13	Horry	510	19	46
11/3/2015	All Hallows Eve	\$0	95	\$0.00	\$65,000.00	14	Horry Georgetown	500	13	41
1/10/2016	Faith's Song	\$0	100	\$0.00	\$125,000.00	34	Lexington Richland Newberry	30	46	50
3/14/2016	We Love You	\$418,465	100	\$1,194,229.60	\$0.00	17	Charleston	1128	270	308
10/10/2016	Naked	\$3,309,886	100	\$6,286,161.37	\$0.00	33	Charleston	1939	862	1009

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
7/24/2017	Another Tango	\$0	100	\$0.00	\$150,000.00	21	Horry Georgetown	1000	21	57
12/14/2017	Family Tradition	\$0	100	\$0.00	\$10,000.00	8	Cherokee	24	7	36
Totals: Feature Film		\$5,603,845		\$11,330,671	\$705,000	225		8660	2367	3025
Project Count:		15								

MOW's/Cable Movies/TV Series/Pilots

1/7/2013	Army Wives - Season 7	\$5,634,118	100	\$13,676,997.00	\$0.00	141	Charleston Dorchester	3673	2110	2660
1/7/2013	Southern Lifestyles	\$0	50	\$0.00	\$20,000.00	5	Charleston	25	6	17
3/20/2013	Reckless (Pilot)	\$528,067	100	\$1,781,858.00	\$0.00	12	Charleston	2110	751	899
4/22/2013	Banshee - Season 2 (portion)	\$0	1	\$0.00	\$105,000.00	3	Greenville	250	0	73
6/6/2013	Welcome to Myrtle Manor - Season 2	\$0	100	\$0.00	\$405,000.00	102	Horry Charleston	1800	26	41
7/31/2013	Reckless - Season 1	\$6,996,286	100	\$16,200,721.76	\$0.00	98	Charleston	7845	1681	2139
9/14/2013	The Hunt	\$0	5	\$0.00	\$50,000.00	12	Beaufort	40	2	4
10/8/2013	Morningside (Pilot)	\$0	100	\$0.00	\$10,000.00	13	Oconee Greenville	15	42	55
10/22/2013	Southern Charm - Season 1	\$0	100	\$0.00	\$800,000.00	2	Charleston	450	27	33
3/3/2014	Identity (Pilot)	\$879,333	100	\$2,244,738.51	\$0.00	10	Charleston	1471	515	617
5/10/2014	All She Wishes	\$0	100	\$0.00	\$100,000.00	25	Marion	760	107	132
5/10/2014	12 Dog Days Till Christmas	\$0	100	\$0.00	\$100,000.00	28	Marion	500	107	120
6/25/2014	Southern Charm - Season 2	\$0	100	\$0.00	\$800,000.00	37	Charleston	450	28	33
9/3/2014	Welcome to Myrtle Manor - Season 3	\$0	100	\$0.00	\$325,000.00	60	Horry	1750	24	41

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
10/20/2014	South of Hell - Season 1	\$3,314,818	100	\$6,227,213.36	\$0.00	87	Charleston Berkeley	0	0	0
12/1/2014	Outcast (Pilot)	\$754,907	100	\$1,117,878.63	\$0.00	14	York Chester	2284	210	469
4/20/2015	The Inspectors - Season 1	\$947,484	100	\$2,913,785.50	\$0.00	130	Charleston	720	143	149
5/3/2015	Vice Principals - Seasons 1 & 2	\$9,614,707	100	\$16,652,641.52	\$0.00	138	Berkeley Charleston	4336	2614	3114
5/15/2015	The Suicide Note	\$0	100	\$0.00	\$160,000.00	12	Florence Marion	736	56	60
5/15/2015	Southern Charm - Season 3	\$0	100	\$0.00	\$800,000.00	35	Charleston	300	28	33
8/5/2015	Outcast - Season 1	\$5,308,531	100	\$10,526,762.75	\$0.00	85	York Chester	2720	715	1262
9/14/2015	Accidental Engagement	\$0	95	\$0.00	\$70,000.00	13	Horry	506	15	42
3/14/2016	The Death of Eva Sofia Valdez (Pilot)	\$1,378,420	100	\$3,863,156.44	\$0.00	15	Horry	5224	376	532
3/22/2016	The Inspectors - Season 2	\$810,104	100	\$2,389,820.28	\$0.00	71	Charleston	82	355	504
6/6/2016	Hunted - Season 1	\$0	10	\$0.00	\$20,000.00	1	Florence Aiken Charleston	23	3	26
7/10/2016	Southern Charm - Season 4	\$0	100	\$0.00	\$800,000.00	35	Charleston	300	29	34
7/25/2016	Outcast - Season 2	\$6,943,097	100	\$12,000,429.94	\$0.00	85	York Chester	3200	1504	2182
10/13/2016	The Sinner (Pilot)	\$1,242,260	100	\$5,197,492.02	\$0.00	15	Charleston Dorchester Chesterfield	674	409	520

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
1/9/2017	Mr. Mercedes - Season 1	\$7,827,009	100	\$14,609,864.80	\$0.00	89	Charleston	1660	982	1319
6/20/2017	Southern Charm - Season 5	\$0	100	\$0.00	\$450,000.00	30	Charleston	200	24	29
Totals: MOW's/Cable Movies/TV Series/Pilots		\$52,179,142		\$109,403,361	\$5,015,000	1403		44104	12889	17139

Project Count:

Other (Student, Docs.)

6/11/2013	American Textures	\$0	20	\$0.00	\$4,000.00	3	Richland Aiken	12	0	11
3/31/2014	50 States of Grey (sizzle reel)	\$0	100	\$0.00	\$1,000.00	1	Charleston	4	0	4
10/15/2014	Operation Swift Justice	\$0	100	\$0.00	\$57,500.00	3	Aiken	300	31	41
10/1/2016	Untitled Bakari Sellers Documentary	\$0	100	\$0.00	\$10,000.00	14	Orangeburg Richland Charleston	42	1	4
5/8/2017	Journey to the Wilderness	\$0	5	\$0.00	\$1,200.00	2	Richland Charleston	6	0	3
12/2/2017	Girl Underground	\$0	90	\$0.00	\$9,000.00	8	Kershaw	40	1	6
Totals: Other (Student, Docs.)		\$0		\$0	\$82,700	31		404	33	69

Project Count:

Print Ads & Catalogs

1/13/2013	Victoza	\$0	100	\$0.00	\$30,000.00	2	Charleston	34	11	20
2/4/2013	Dick's Sporting Goods	\$0	100	\$0.00	\$50,000.00	4	Charleston	62	4	16
2/11/2013	Stanley Furniture - Winter '12	\$0	100	\$0.00	\$10,000.00	3	Georgetown Charleston	30	4	10
5/3/2013	Sea Doo - Spring '13	\$0	100	\$0.00	\$150,000.00	8	Anderson	420	73	138
6/17/2013	Lowe's: Patio Guide - Summer '13	\$0	50	\$0.00	\$75,000.00	11	Charleston	725	4	33

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
8/7/2013	Old Dominion	\$0	100	\$0.00	\$10,000.00	4	Charleston	9	1	4
9/21/2013	Mobile One	\$0	100	\$0.00	\$4,100.00	1	Fairfield	16	4	8
11/5/2013	Team M	\$0	100	\$0.00	\$30,000.00	2	Horry	120	6	25
11/13/2013	Skool	\$0	100	\$0.00	\$15,000.00	5	Charleston	213	24	69
11/17/2013	LL Bean - Fall '13	\$0	100	\$0.00	\$50,000.00	7	Charleston	160	4	24
11/19/2013	Lane Venture Furniture - Fall '13	\$0	100	\$0.00	\$75,000.00	0	Charleston	34	4	21
1/7/2014	Stanley Furniture - Winter '14	\$0	100	\$0.00	\$20,000.00	3	Charleston	60	2	14
3/2/2014	Mini Cooper	\$0	100	\$0.00	\$25,000.00	2	Charleston	30	3	13
3/19/2014	Belk - Spring '14	\$0	100	\$0.00	\$15,000.00	1	Charleston	52	2	28
4/3/2014	Woman Within - Spring '14 (part 1)	\$0	100	\$0.00	\$120,000.00	10	Charleston	120	4	28
4/11/2014	Distinctive Apparel - Spring '14	\$0	100	\$0.00	\$60,000.00	3	Charleston	40	3	17
4/12/2014	Woman Within - Spring '14 (part 2)	\$0	100	\$0.00	\$75,000.00	7	Charleston	78	4	28
4/13/2014	Aramark - "We Dream. We Do."	\$0	25	\$0.00	\$90,000.00	4	Pickens	24	4	10
4/23/2014	Blair Catalog - Spring '14	\$0	100	\$0.00	\$20,000.00	15	Charleston	150	2	17
5/12/2014	S&S Activewear	\$0	100	\$0.00	\$45,000.00	7	Charleston	147	2	23
5/22/2014	DEDON Furniture	\$0	100	\$0.00	\$45,000.00	5	Charleston	85	2	21
7/21/2014	GDC Home - Winter '14	\$0	100	\$0.00	\$3,000.00	3	Georgetown	3	3	3
10/7/2014	Blair Catalog - Fall '14	\$0	100	\$0.00	\$20,000.00	5	Charleston	50	2	17
8/25/2015	Lowe's: Patio Guide - Fall '16	\$0	100	\$0.00	\$50,000.00	5	Charleston	90	2	32
10/18/2015	David Donahue - Spring '16	\$0	100	\$0.00	\$75,000.00	3	Charleston	42	3	26

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
2/11/2016	Real Simple - '16	\$0	100	\$0.00	\$25,000.00	0	Charleston	30	2	11
12/5/2016	Belk - Fall '16	\$0	100	\$0.00	\$95,000.00	14	Charleston	100	6	16
1/10/2017	Belk - Winter '17	\$0	100	\$0.00	\$75,000.00	3	Charleston	45	3	17
12/6/2017	Belk - '17	\$0	100	\$0.00	\$120,000.00	3	Charleston	48	2	17
12/14/2017	Ralph Lauren - '17	\$0	100	\$0.00	\$75,000.00	2	Charleston	28	3	25
Totals: Print Ads & Catalogs		\$0		\$0	\$1,552,100	142		3045	193	731
Project Count:			30							

Training/Industrials

9/29/2013	Mercedes Benz USA - Sprinter	\$0	100	\$0.00	\$60,000.00	3	Charleston	85	26	43
1/6/2014	Darden Stories	\$0	100	\$0.00	\$2,000.00	2	Charleston Richland Lexington	13	21	25
7/13/2014	BMW - M3 & M4	\$0	100	\$0.00	\$30,000.00	2	Greenville	27	8	13
10/7/2015	Cordish Corporate Video	\$0	10	\$0.00	\$6,000.00	1	Charleston	4	6	8
6/15/2017	Volvo - '17 (part 2)	\$0	100	\$0.00	\$45,000.00	3	Charleston	18	3	13
11/27/2017	Brand Essence	\$0	10	\$0.00	\$5,000.00	2	Pickens	22	7	18
Totals: Training/Industrials		\$0		\$0	\$148,000	13		169	71	120
Project Count:			6							

TV Commercials

4/26/2013	Sun Drop	\$0	100	\$0.00	\$56,000.00	1	Richland	12	19	23
5/31/2013	Make the Connection (web)	\$0	10	\$0.00	\$12,400.00	3	Charleston	4	3	4
9/17/2013	Greenville Health Systems	\$0	100	\$0.00	\$250,000.00	4	Greenville	20	65	68
10/25/2013	Electrolux/Frigidaire	\$0	33	\$0.00	\$15,000.00	2	Anderson	20	9	13

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
12/4/2013	Crestor	\$0	100	\$0.00	\$75,000.00	2	Charleston	30	2	17
2/24/2014	Tanger	\$0	100	\$0.00	\$75,000.00	4	Charleston	170	8	42
5/10/2015	Chantix	\$0	100	\$0.00	\$4,500.00	2	Anderson	26	5	17
9/5/2015	Infrastructure	\$0	100	\$0.00	\$40,000.00	2	Charleston	20	20	23
10/19/2015	Southeastern Grocers	\$0	100	\$0.00	\$450,000.00	2	Charleston	89	52	73
12/17/2015	ESPN - College Football Playoffs	\$0	20	\$0.00	\$1,000.00	1	Pickens	6	2	5
3/24/2016	SCPRT - '16	\$0	100	\$0.00	\$5,000.00	3	Charleston Aiken	12	3	10
2/21/2017	Volvo - '17 (part 1)	\$0	100	\$0.00	\$116,000.00	2	Charleston	48	6	18
4/25/2017	GABO	\$0	30	\$0.00	\$20,000.00	3	Berkeley Richland	48	2	18
Totals: TV Commercials		\$0		\$0	\$1,119,900	31		505	196	331
Project Count: 13										

TV Episodes/Music Videos

1/5/2013	Southern Style (Raycom)	\$0	50	\$0.00	\$6,500.00	4	Horry Charleston	28	47	54
1/14/2013	Restaurant Impossible (Food Network)	\$0	33	\$0.00	\$20,000.00	2	Horry	14	6	13
2/2/2013	Haunted Highway	\$0	50	\$0.00	\$25,000.00	3	Newberry	50	9	21
6/24/2013	WWE Total Divas (E! Entertainment)	\$0	4	\$0.00	\$1,000.00	1	Charleston Richland	42	0	42
7/12/2013	Wheeler Dealer (Discovery UK)	\$0	50	\$0.00	\$10,000.00	3	Greenville	16	8	21
7/18/2013	The Voice	\$0	3	\$0.00	\$1,500.00	1	Anderson	16	2	9
7/30/2013	How We Got to Now	\$0	1	\$0.00	\$1,000.00	0	Charleston	0	0	2

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
8/26/2013	Beachfront Bargain Hunt - '13	\$0	10	\$0.00	\$10,000.00	6	Horry	35	4	11
8/27/2013	GE-EK	\$0	25	\$0.00	\$50,000.00	0	Greenville	40	3	10
9/3/2013	Investigation Discovery: Evil Twins	\$0	60	\$0.00	\$1,200.00	3	Richland	8	2	6
9/10/2013	Rent or Buy (HGTV)	\$0	100	\$0.00	\$10,000.00	8	Charleston	35	4	9
10/8/2013	Showdown of the Unbeatables	\$0	1	\$0.00	\$1,000.00	1	Greenville	8	6	11
11/4/2013	Flipping Ships - Pilot (Animal Planet)	\$0	100	\$0.00	\$10,000.00	5	Greenville	24	8	10
11/15/2013	Holy Smokers (Destination America)	\$0	100	\$0.00	\$50,000.00	3	Horry	35	12	24
12/11/2013	It Came From Out of Nowhere	\$0	5	\$0.00	\$1,000.00	2	Chester	20	5	15
12/13/2013	Chowdown Countdown 2	\$0	5	\$0.00	\$1,000.00	2	Charleston	6	17	19
12/19/2013	One Night Stand With Annie Sibonney	\$0	10	\$0.00	\$30,000.00	3	Charleston	32	2	9
1/15/2014	Drunk History - Season 2 (Comedy Central)	\$0	5	\$0.00	\$25,000.00	2	Charleston	40	9	19
1/17/2014	Roadshow Recipe - "The Sizzle"	\$0	100	\$0.00	\$10,000.00	8	Georgetown Horry	130	1	11
2/3/2014	Belly Up! (Cooking Channel)	\$0	80	\$0.00	\$45,000.00	3	Charleston	30	7	17
2/15/2014	Pressure Cooker	\$0	100	\$0.00	\$50,000.00	1	Charleston	90	6	41
2/18/2014	Moving Country	\$0	15	\$0.00	\$500.00	2	Greenville	4	0	2
2/22/2014	Southern Fried Homicide (Discovery Channel)	\$0	50	\$0.00	\$8,000.00	8	Aiken	20	9	12
4/15/2014	Vacation House for Free - 2014	\$0	100	\$0.00	\$20,000.00	10	Beaufort	110	9	19
4/15/2014	NYX, "Dads & Grads"	\$0	20	\$0.00	\$20,000.00	1	Richland	6	9	12

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
5/10/2014	Beachfront Bargain Hunt - Part 1 (HGTV)	\$0	100	\$0.00	\$7,000.00	4	Horry	40	3	11
5/12/2014	My Dirty Little Secret	\$0	10	\$0.00	\$5,000.00	1	Horry	21	2	6
5/15/2014	Gypsy Sisters - Season 2 (portion)	\$0	20	\$0.00	\$12,000.00	0	Horry	110	2	12
5/20/2014	Ghost Inside My Child	\$0	6	\$0.00	\$4,500.00	3	Anderson	6	1	4
5/29/2014	American Epic (BC)	\$0	10	\$0.00	\$10,000.00	1	Chesterfield	15	2	7
6/12/2014	World Invitational Tournament	\$0	100	\$0.00	\$10,000.00	3	Sumter	9	0	8
6/29/2014	Beachfront Bargain Hunt - Part 2 (HGTV)	\$0	20	\$0.00	\$15,000.00	6	Horry	36	10	16
7/16/2014	American Idol - Season 14 (Fox)	\$0	1	\$0.00	\$5,000.00	2	Horry	4	5	15
8/11/2014	Hotel Impossible	\$0	50	\$0.00	\$15,000.00	5	Aiken	78	4	17
9/11/2014	Beachfront Bargain Hunt - Part 3 (HGTV)	\$0	100	\$0.00	\$10,000.00	4	Beaufort	40	4	12
9/25/2014	Shark Tank - Season 6	\$0	2	\$0.00	\$2,000.00	1	Horry	6	3	8
10/13/2014	A Sale of Two Cities	\$0	5	\$0.00	\$10,000.00	3	Charleston	20	6	11
11/18/2014	Island Hunters	\$0	100	\$0.00	\$3,000.00	3	Charleston	40	5	10
12/13/2014	Arranged (F.Y.I. TV)	\$0	33	\$0.00	\$100,000.00	35	Anderson Greenville Charleston	140	25	163
1/3/2015	Arranged - Season 1	\$0	40	\$0.00	\$30,000.00	25	Anderson Greenville Charleston	125	9	17
2/15/2015	Secret Weapon of the Confederacy: CSS Hunley	\$0	100	\$0.00	\$15,000.00	3	Charleston	24	4	10
2/19/2015	Lone Target - Season 2	\$0	20	\$0.00	\$40,000.00	7	Aiken	120	14	30

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
4/13/2015	Vacation House for Free - 2015	\$0	100	\$0.00	\$20,000.00	0	Beaufort	65	5	18
4/20/2015	Anthony Bourdain: Parts Unknown	\$0	100	\$0.00	\$65,000.00	8	Charleston	50	4	10
6/2/2015	Skyworld	\$0	5	\$0.00	\$10,000.00	11	Berkeley	13	1	2
6/3/2015	Chelsea Does: Racism	\$0	60	\$0.00	\$20,000.00	2	Colleton Charleston Richland	32	9	20
6/15/2015	Endless Yard Sale - Season 1	\$0	100	\$0.00	\$25,000.00	2	Florence Dorchester	20	2	9
6/25/2015	Island Life - '15	\$0	10	\$0.00	\$20,000.00	5	Beaufort	42	5	12
7/29/2015	Food Happened Here	\$0	50	\$0.00	\$35,000.00	3	Beaufort	28	3	10
10/29/2015	Beachfront Bargain Hunt - '15	\$0	30	\$0.00	\$50,000.00	4	Beaufort	23	4	9
11/16/2015	Total Divas	\$0	10	\$0.00	\$100,000.00	3	Greenville	50	0	25
12/8/2015	Botched by Nature	\$0	50	\$0.00	\$15,000.00	3	Richland	18	4	10
2/15/2016	Conway Case	\$0	60	\$0.00	\$5,000.00	4	Horry	36	4	4
6/5/2016	The Hunted (CBS)	\$0	25	\$0.00	\$25,000.00	4	Charleston	24	7	23
7/15/2016	Made Man: Barbecue in America	\$0	50	\$0.00	\$5,000.00	2	Orangeburg	30	2	15
7/29/2016	Red, White, & Food	\$0	10	\$0.00	\$5,000.00	3	Beaufort	30	5	12
10/29/2016	House Hunters International - '16	\$0	33	\$0.00	\$10,000.00	1	Georgetown	6	3	8
11/14/2016	Southern Road Trip w/the Potash Twins	\$0	100	\$0.00	\$15,000.00	3	Charleston Lee Beaufort Orangeburg	32	1	10

Date	Project Title	Total Rebate	% Shot in SC	Total Spend SC Qualified Prods.	Total Spend SC Non Qualf Prods.	Total SC Days	Counties	Hotel Nights	Total SC Hires	Total Hires
2/15/2017	Invitation Au Voyage (Arte TV)	\$0	30	\$0.00	\$500.00	16	Charleston	0	2	3
2/25/2017	Ride with Norman Redus	\$0	50	\$0.00	\$32,000.00	4	Charleston Beaufort	77	3	15
3/4/2017	Ginormous Food	\$0	25	\$0.00	\$25,000.00	3	Richland Charleston	32	2	7
3/15/2017	Beach Bites - Season 2	\$0	50	\$0.00	\$10,000.00	3	Horry Charleston	22	1	10
3/28/2017	The Bachelorette - Season 13	\$0	15	\$0.00	\$25,000.00	3	Beaufort	46	7	19
3/28/2017	What Really Happened	\$0	90	\$0.00	\$1,500.00	2	Greenwood Abbeville	6	1	3
5/24/2017	Untitled Committee Films	\$0	100	\$0.00	\$4,000.00	3	Greenville Spartanburg	15	1	5
6/1/2017	Beachfront Bargain Hunt - '17	\$0	100	\$0.00	\$45,000.00	0	Beaufort	35	6	13
6/8/2017	Food Paradise - '17	\$0	50	\$0.00	\$10,000.00	2	Horry	21	3	10
7/8/2017	Hate Thy Neighbor 2	\$0	5	\$0.00	\$4,000.00	2	Richland Charleston	16	1	9
7/14/2017	The Voice - B-Roll	\$0	5	\$0.00	\$2,500.00	1	Anderson	20	1	11
9/14/2017	Noah & Allie	\$0	1	\$0.00	\$50,000.00	1	Anderson	1	3	4
9/28/2017	Web of Lies	\$0	40	\$0.00	\$2,000.00	1	Dorchester	3	0	3
11/13/2017	HGTV's Beach Hunters	\$0	100	\$0.00	\$2,000.00	0	Beaufort	24	4	12
12/5/2017	House Hunters	\$0	90	\$0.00	\$20,000.00	6	Greenville	6	6	7
Totals: TV Episodes/Music Videos		\$0		\$0	\$1,359,700	293		2496	384	1104
Project Count: 73										
Grand Total		\$57,782,988		\$120,734,032	\$9,982,400	2138		59383	16133	22519

Appendix C. Film Impact Qualitative and Quantitative Research (January 2013)



South Carolina Department of Parks,
Recreation & Tourism

South Carolina Film Commission

Film Impact Qualitative and Quantitative Research
January 2013

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Executive Summary

- ▶ SCPRT and The South Carolina Film Commission have partnered with Strategic Marketing & Research, Inc. (SMARI) to estimate the impact of a sample of TV shows/movies that were filmed and/or set in South Carolina.
- ▶ Three increasingly conservative quantitative research efforts and four focus groups conclude with certainty that television and film productions influence leisure travel.
- ▶ Measures of “effective recall” and “qualified travel” were developed to assess production impact on South Carolina travel.
 - ▶ Effective recall means seeing the production and knowing where it was filmed and/or set.
 - ▶ Qualified travel means that the South Carolina trip was taken after viewing the production and the traveler indicates that a TV show or movie was a travel motivator.
- ▶ Those with effective production recall have a higher level of qualified South Carolina travel than those without effective recall. This indicates that *incremental travel* exists (travel that can be attributed to the selected productions).
- ▶ The productions that are most likely to influence travel include TV shows about travel or food, romance/drama movies or TV shows, and sitcoms.
- ▶ The specific production attributes that are most likely to be a major influence on travel include coastal scenery, natural scenery, relaxation, historical sites, and iconic locations/landmarks.

Background

- ▶ South Carolina has been the backdrop for more than 100 feature films and more than 70 TV movies, series, and pilots. There are obvious financial benefits associated with the production of television shows and films in South Carolina, such as the creation of jobs and economic impact. In addition to these clearly earmarked benefits, there is potential for these films and television shows set or filmed in South Carolina to act as promotions that can drive state tourism.
- ▶ The South Carolina Film Commission strives to attract future television and movie productions to film in the state by promoting its incredibly diverse geography and availability of eclectic urban settings. The commission also uses a variety of financial incentives to encourage production.
- ▶ Strategic Marketing & Research, Inc. (SMARI) has conducted two research studies designed to assess the impact of a sample of productions set in and/or filmed in South Carolina on leisure travel to the state. The productions included were *Dear John*, *The Patriot*, *The Notebook*, and *Army Wives*. The initial feasibility study conducted in November 2011 illustrated that a measure of incremental travel (influenced travel) could be attributed to productions set in South Carolina. The second round of research was an expanded effort that included South Carolina Department of Parks, Recreation & Tourism (SCPRT) leisure advertising in order to gauge potential synergies created between these productions and traditional marketing efforts. The results of the expanded research effort confirmed the prior results. Those who had seen the selected productions and could identify them as being set or filmed in South Carolina had a higher rate of travel to the state than those who had not seen the productions or did not know that they were set or filmed in South Carolina.
- ▶ SCPRT partnered with SMARI to conduct another round of research to expand on the previous efforts. The overall objectives of the new efforts are to refine the production impact measure and to identify what types of productions are most impactful so as to proactively recruit productions for filming in South Carolina and to link incentives to potential benefits. This research included qualitative and quantitative phases.

Objectives

The specific informational objectives of the qualitative and quantitative phases are as follows:

▶ **Qualitative:**

- ▶ Explore specific aspects of productions that generate interest in travel or actual travel.
- ▶ Develop a set of criteria to test in the quantitative study for their likelihood to influence travel.

▶ **Quantitative:**

- ▶ Further refine the measurement of production impact on travel so that SCPRT and the Film Commission are confident in communicating impact results.
- ▶ Measure the impact of each production on South Carolina travel.
- ▶ Capture South Carolina trip specifics and travel spending to facilitate estimation of economic impact and ROI.
- ▶ Validate the production criteria developed in the qualitative efforts.
- ▶ Identify criteria to be used to determine levels of incentives.

Methodology

▶ Qualitative:

- ▶ A total of four focus groups were conducted. Two were in Boston, Massachusetts, on September 10th, 2012, and two were in Memphis, Tennessee, on September 11th, 2012.
- ▶ The groups consisted of 8 to 10 participants who were qualified by being leisure travelers and indicating that a film or TV production has had some sort of influence on travel or interest in travel.
- ▶ The group discussion focused on uncovering what specific aspects of TV/film productions might prompt interest in travel.

▶ Quantitative:

- ▶ An online survey was conducted between October 16th, 2012, and October 20th, 2012, among leisure travelers who live east of the Mississippi River.
- ▶ A total of 1,576 surveys were completed.
- ▶ Respondents were screened to be leisure travelers and have some responsibility for travel decision-making in the household.

Qualitative Findings

Qualitative Summary

- ▶ The focus group discussions revealed that there is no question that what people see in film and television productions has an enormous influence on travel. In many ways films are what builds our mental image of what a place is like. As such it may be fair to say that productions have the strongest influence when we are young. The image library is created early and subsequently expanded and edited. Thus the impact of productions on travel can take years or even decades to be realized. This is most apparent with international and exotic destinations.
- ▶ In fact, when we review people's "bucket lists" of places they have yet to see, more often than not they can recall a film that generated their perceptions (or many influences in the case of places like Paris or Hawaii). This is a positive finding that links productions to travel, but is also part of the reason that the connection is so hard to clearly identify.
- ▶ There are specific connections between film and travel, and sometimes this appears to be to visit a site rather than a destination. The steps of the Philadelphia museum from *Rocky*, the bench in Savannah from *Forrest Gump*, the Chicago fountain from *Married with Children*, and the Cleveland house from *A Christmas Story* are all examples of sites that participants indicated visiting while on a trip.
- ▶ This type of direct connection can be seen most concretely with Food Network and Travel Channel programs that visit specific restaurants or sites. Every focus group had significant viewership of these types of programs and reported specific visitation. Similar, but less pervasive relationships were seen with other reality shows such as *Housewives*, *Bachelorette*, etc. Reality shows seem to hold potential to influence travel because they are real, recent, and repeated.

Qualitative Summary

- ▶ The search for the issues that were motivating and the production characteristics that were most impactful proved decidedly elusive. Broadly speaking it seems that beauty shots are of key importance – showing the beauty of the place and ideally capturing an icon to create a link. Beauty seems to have a link to relaxation, and iconic sites are tied to history.
- ▶ These motivating characteristics may be more prevalent in relationship films such as romantic comedies or dramas. Action and crime films seem to be less effective at making the place seem attractive, but this was not universally true. Something dark may seem intuitively bad but it can also work. However, it seems that a negative portrayal of a place would have more of a negative impact than a positive portrayal would have a positive impact.
- ▶ The focus groups clearly uncovered the following:
 - ▶ The place needs to be prominently promoted in the production.
 - ▶ Iconic imagery and places are critical.
 - ▶ Beauty shots matter.
 - ▶ Other connectivity such as celebrity mentions/endorsements do not hurt.
- ▶ Beyond these findings the underlying conceptual glue seems tough to pinpoint. However, the focus groups uncovered a much richer trove of reported influencers to test in the quantitative phase.
- ▶ The focus group findings helped to guide the quantitative survey revisions that were put in place to:
 - ▶ Verify the specific production criteria that are most likely to influence travel.
 - ▶ Provide a more conservative measure of film impact by assessing when productions were viewed relative to travel and directly asking if a film/TV show played a role in selecting South Carolina.
 - ▶ Estimate the economic impact of the productions.
- ▶ The following is a summary of the quantitative findings.

Quantitative Findings

Self-Reported Production Influence

Self-Reported Production Influence

54%

36%

Destination Selection

Visiting a Location/Site while on a Trip

Type of Production	Has influenced destination selection	Has influenced location/site visit while on a trip
TV show about travel	34%	13%
Romance movie	23%	10%
TV show about food	17%	9%
Action movie	13%	8%
Reality TV show	13%	6%
Drama movie	13%	7%
Comedy movie	10%	7%
TV drama	8%	5%
TV sitcom	8%	6%

- ▶ More than half of leisure travelers report that a production has influenced a vacation destination selection. More than one-third indicates visiting a location or site from a movie while on a trip.
- ▶ Travel shows, romance movies, and food shows seem to have the most influence on travel from this standpoint.

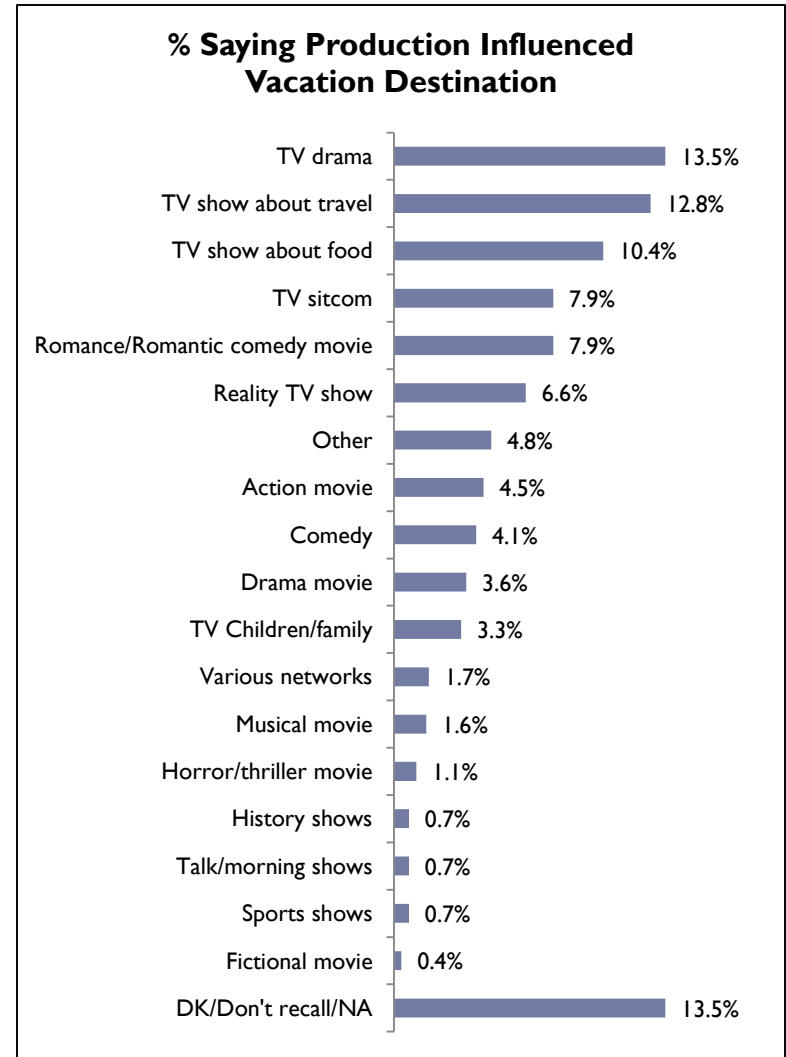
Self-Reported Production Influence

- ▶ Respondents who indicated that a production had influenced their travel were asked in an open-ended fashion to list the specific production and the corresponding vacation destination.
- ▶ First consider the specific productions that were mentioned as influencers.
- ▶ Travel and food-related shows came to the top, but numerous productions were mentioned as vacation destination influencers. In fact, the majority were mentioned so infrequently that they were lumped into the “other” category.

Production:	% Saying Production Influenced Vacation Destination
Travel Channel	7.7%
Hawaii 5-O/Hawaii	3.3%
Disney programs	2.5%
Diners, drive ins and dives	2.1%
Man vs. Food	1.9%
Food Network	1.9%
CSI - Miami, NYC, Las Vegas	1.5%
No Reservations with Anthony Bourdain	1.4%
The Notebook	1.2%
Vegas/Las Vegas	1.1%
Seinfeld	0.9%
Real World	0.9%
Rick Stevens Travel	0.9%
Law & Order	0.7%
Jersey Shore	0.7%
Friends	0.7%
Sleepless in Seattle	0.6%
Midnight in the Garden of Good & Evil	0.6%
Samantha Brown Travels	0.6%
Miami Vice	0.6%
Twilight	0.6%
Survivor	0.6%
Amazing Race	0.6%
Full House	0.6%
Burn Notice	0.6%
Raymond	0.6%
The Hangover	0.6%
House Hunters	0.5%
Keeping Up with the Kardashians	0.5%
Magnum PI	0.5%
Bizarre Foods with Andrew Zimmerman	0.5%
Basketball Wives	0.5%
Blue Hawaii	0.5%
Real Housewives	0.5%
Other/DK/NA	60.3%

Self-Reported Production Influence

- ▶ When the productions mentioned are coded into “types” or “genres,” we see that TV dramas, travel/food shows, romances, sitcoms, and reality TV are most likely to influence travel.



Self-Reported Production Influence

- ▶ Productions influenced travel to many destinations including South Carolina. The 2.5% who said that a production influenced South Carolina may be understated given this is the result of an open-ended exercise.
- ▶ Travel Channel, Food Network, *Man vs. Food*, *The Notebook*, and *The Patriot* were all mentioned as productions that influenced South Carolina travel.

Location	% Who Visited Because of a Production
NYC/NY	7.1%
Other countries	7.1%
Hawaii Islands	7.0%
Las Vegas	4.5%
Italy (Rome, Venice, Tuscany, etc.)	4.5%
Florida	4.5%
Other	4.3%
Other Southern states/cities	3.9%
Disney World/Disneyland	3.5%
Other North East states/cities	3.1%
California	3.0%
Other Midwest states/cities	2.8%
South Carolina	2.5%
Caribbean	2.5%
Miami	2.2%
Bahamas	2.1%
Mexico (Cancun, Cabo)	2.1%
North Carolina	2.0%
Chicago	1.7%
Savannah, GA	1.4%
San Francisco	1.4%
New Orleans	1.4%
New Jersey	1.4%
Other Southwestern states/cities	1.4%
Seattle	1.3%
Orlando	1.2%
Canada	1.2%
Philadelphia	1.0%
Paris	1.0%
Los Angeles	1.0%
Jamaica	1.0%
Boston	0.9%
Washington	0.9%
Washington, DC	0.8%
Alaska	0.8%
Maine	0.8%
Atlanta	0.8%
Greece	0.7%
Other Northwestern states/cities	0.7%
Ireland	0.5%
Gettysburg	0.5%
NA/DK	7.2%

Self-Reported Production Influence

Self-Reported Production Influence

40% have visited South
Carolina in the past 10 years.



15% of these visitors
indicated that a TV show or
movie was a major motivation
for their *most recent South
Carolina trip.



6% of South Carolina visitors'
most recent visits were to
be motivated by a TV show or
movie.

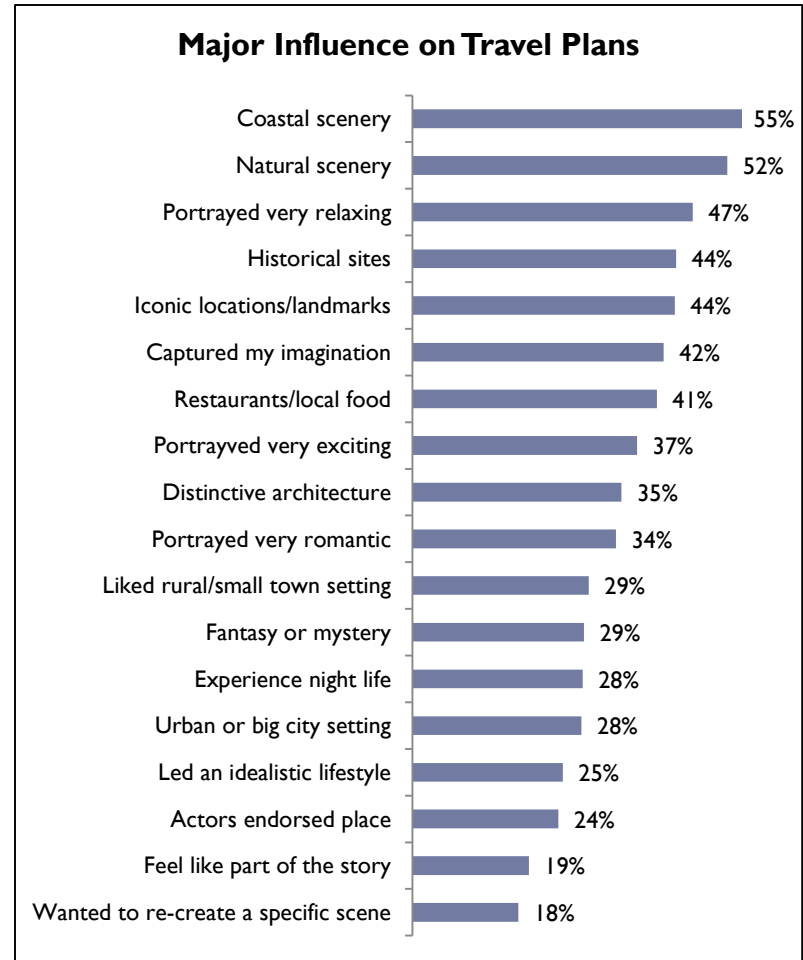
Major Motivator of Most Recent South Carolina Trip	%
To get away and relax	60%
To explore new places	40%
A place we routinely visit	30%
Family lives nearby	28%
We've been before, don't routinely visit, wanted to get back to	27%
Heard about it from friends or family	27%
To go to an event	25%
Have always wanted to go but never had the opportunity	21%
To take advantage of sale/package deal	17%
Is a place you've seen on TV or in movies	15%
Saw an article or story	13%
To combine vacation with business trip	12%
Saw an ad	12%
Received an e-mail promotion	9%

- ▶ Those who have visited South Carolina in the past 10 years were asked the degree to which a list of potential influencers motivated their *most recent trip.
- ▶ Overall 40% of those surveyed had visited South Carolina in the past 10 years. Of these, 15% indicate that their most recent trip was motivated by a film or TV show. So the research suggests that productions motivated 6% (40% x 15%) of these most recent South Carolina visits.
- ▶ As noted, the open-ended exercise revealed that 2.5% of leisure travelers took a South Carolina trip that was motivated by a production. However, the unaided nature of this exercise likely understated the impact.
- ▶ The bottom line is that both unaided and aided approaches clearly support that South Carolina travel is influenced by movies/TV shows.

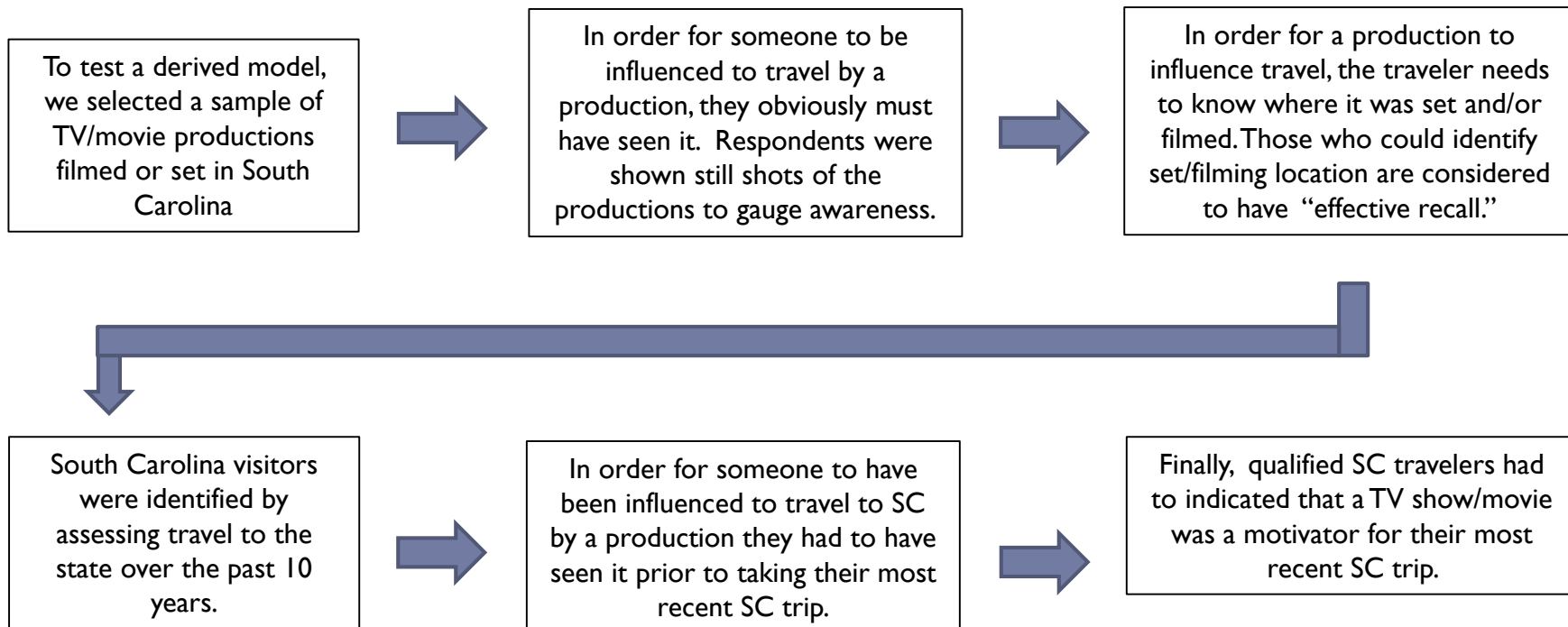
**While some have taken multiple trips to South Carolina in the past 10 years, this research focuses on the most recent trip.*

Motivating Production Criteria

- ▶ Scenery is the production attribute that is most likely to be identified as a “major influence” on travel planning.
- ▶ Relaxation, historical sites, iconic locations/landmarks are other top influencers.
- ▶ Immersion into the story or specific scenes is less of a motivator.
- ▶ The relative strength of these production attributes could be used to determine levels of incentives.



Derived Production Influence

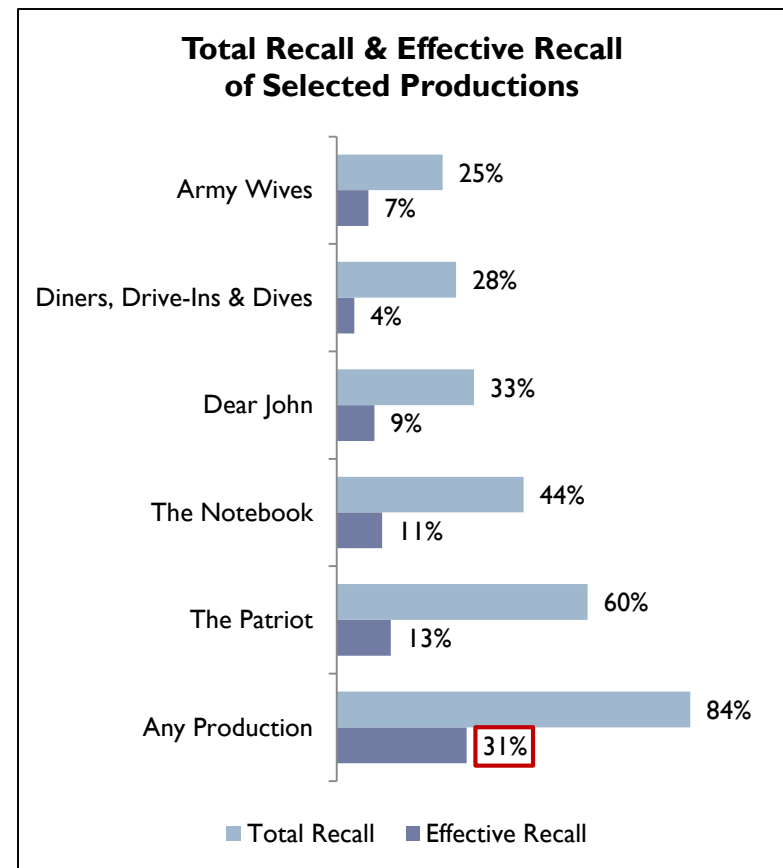


Qualified travelers were aware of any of the productions tested, knew the filming/set locale, visited SC in the past 10 years, took their most recent SC trip after viewing the production, and indicated that a TV show/movie was a motivation for their most recent SC trip.

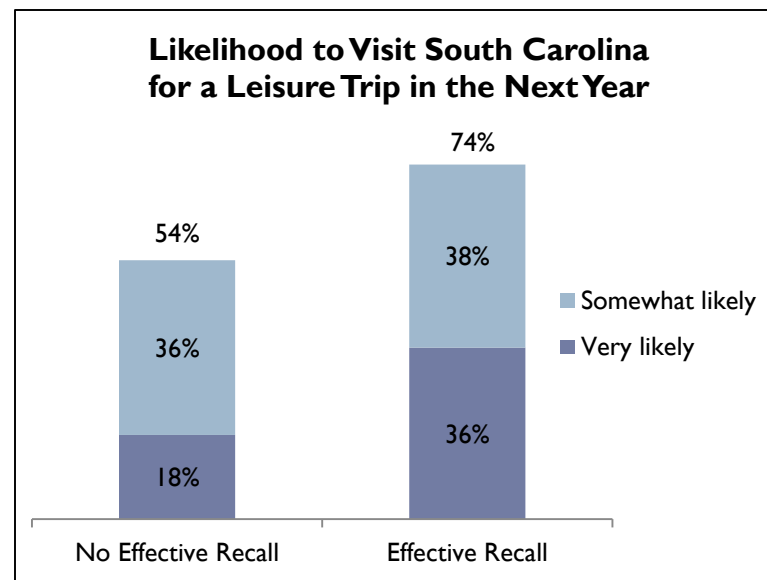
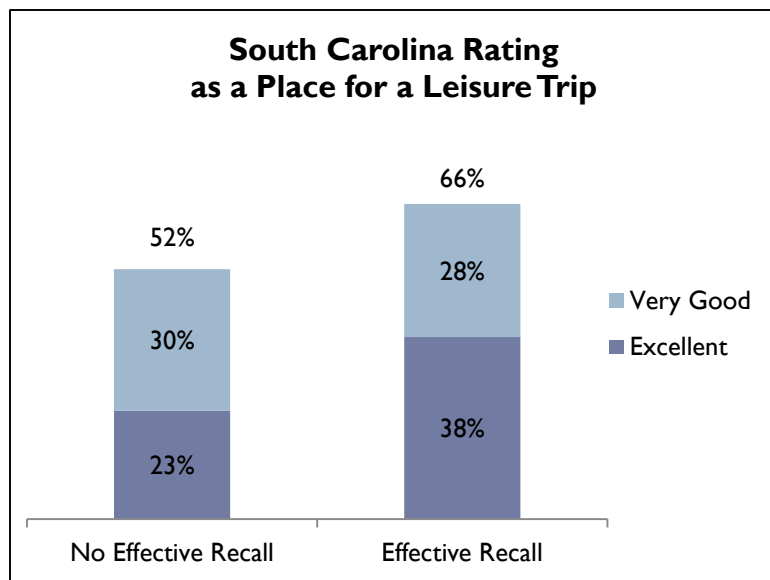
The level of qualified SC travel among those with effective recall is compared to the level of SC travel among those without effective recall to arrive at "incremental," or production-influenced travel

Derived Production Influence

- ▶ In order to assess whether respondents had seen any of the selected productions, film posters and still shots of iconic scenes were displayed to arrive at a measure of aided recall.
- ▶ However, having seen the film is not enough to assess its impact on leisure travel. The respondents who identified having seen the production were then asked where it was filmed and where it was set.
- ▶ Effective recall for these purposes is qualified by having seen the production and knowing that it was either filmed or set in South Carolina.
- ▶ Overall 31% of the target audience indicates having seen any of the selected productions and correctly identified the filming location or setting.
 - ▶ This is the awareness measure that will be used in the calculation of incremental, or production-influenced South Carolina travel.



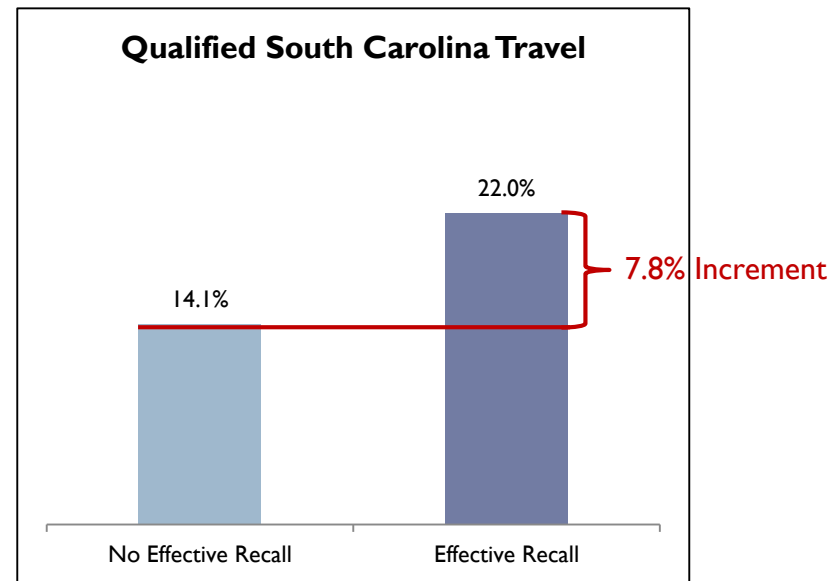
Derived Production Influence



- ▶ The ultimate goal of this research is to assess production impact on South Carolina travel that has already occurred. But it is also interesting to review production impact on the state's image as a leisure destination and impact on likely future travel.
- ▶ Those with effective recall of the South Carolina productions rate the state more favorably and are more likely to visit in the next year than those without effective recall.

Derived Production Influence

- ▶ This research was designed to arrive at a representative measure of influenced travel by using:
 - ▶ Qualified travel, which for those with effective recall is defined as taking the most recent South Carolina trip *after seeing the production* and indicating that a *film or TV show was a motivator* for this trip. This definition of qualified travel has been revised over the research iterations to be more exacting.
 - ▶ Qualified travel for those who do not have effective recall is South Carolina travel that was not motivated by routine or to visit family.
 - ▶ Effective recall is defined as having seen any of the selected productions and correctly identifying the filming location or setting.
- ▶ The level of production influence is quantified by comparing a test case to a baseline. The test case is those with effective production recall; the baseline is those without effective recall.
- ▶ The level of influenced travel measured in this research is 7.8%.
- ▶ *This is a noteworthy finding, but this research approach is still new and we are still exploring ways to frame what a level of influence might be.*

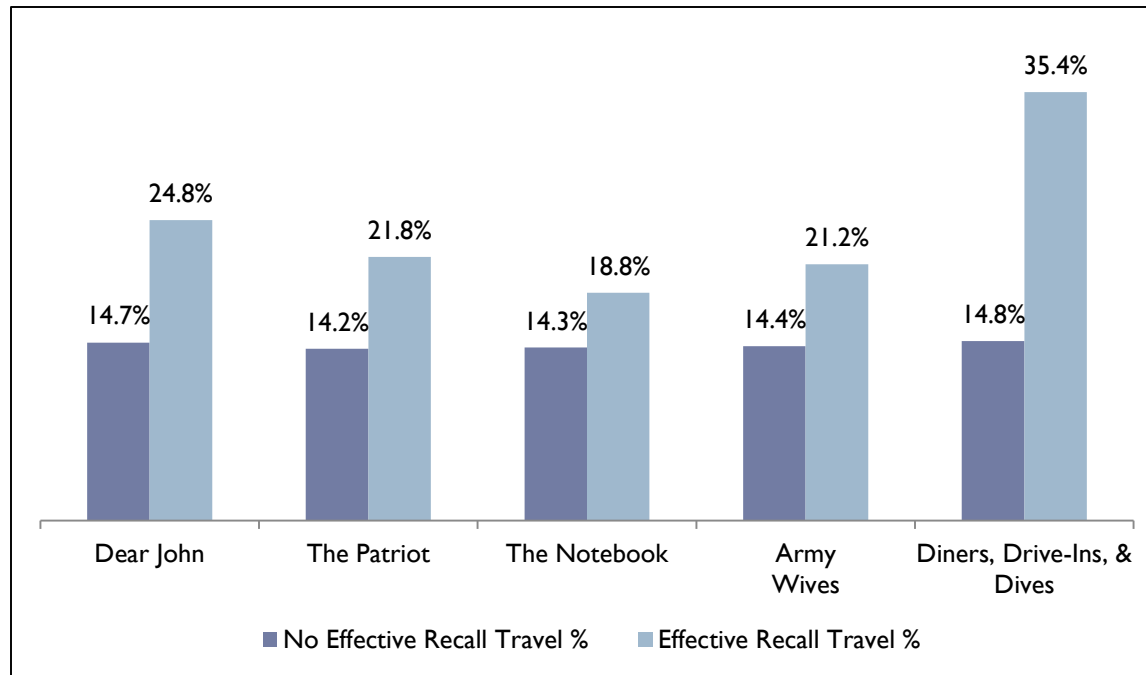


Economic Impact

Total Target HHs (U.S. HHs east of the Mississippi River)	64.1M
Effective Recall	31%
Aware HHs	19.8M
Incremental Travel	7.8%
Incremental Traveling HHs	1.6M
Avg. Trip Spending from survey data	\$1,113
Economic Impact	\$1.7B

- ▶ Applying average trip spending to the number of influenced traveling HHs allows an estimation of production economic impact.
- ▶ The research suggests that in the past ten years, the selected productions may have influenced approximately 1.6M South Carolina trips.
- ▶ With average trip spending of \$1,113, it is estimated that these productions have generated \$1.7B in travel revenue for the state over this ten year period.

Estimating Impact by Production



- ▶ The reality food show *Diners, Drive-Ins & Dives* and the romantic and scenic movie *Dear John* generated the strongest individual increments.
- ▶ However, it should be noted that awareness is not unique; for example, those who saw *Dear John* might also have seen *The Patriot*.

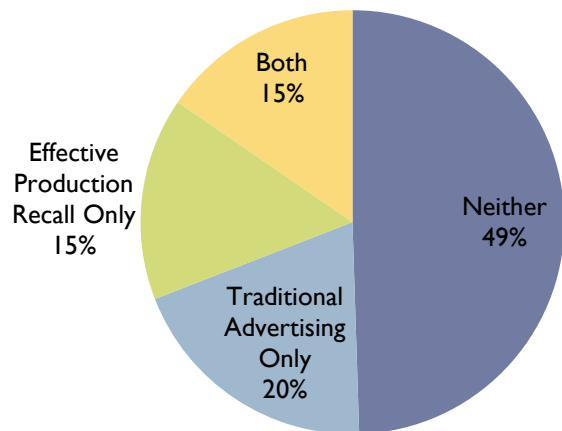
Estimating Impact by Production

Production	% of Total Increment	Economic Impact Over 10 Years	Economic Impact per Year
Dear John	20%	\$352,352,428	\$35,235,243
The Patriot	15%	\$264,295,374	\$26,429,537
The Notebook	9%	\$157,659,038	\$15,765,904
Army Wives	14%	\$236,198,377	\$23,619,838
Diners, Drive-Ins, & Dives	41%	\$715,926,780	\$71,592,678
Total	100%	\$1,726,431,997	\$172,643,200

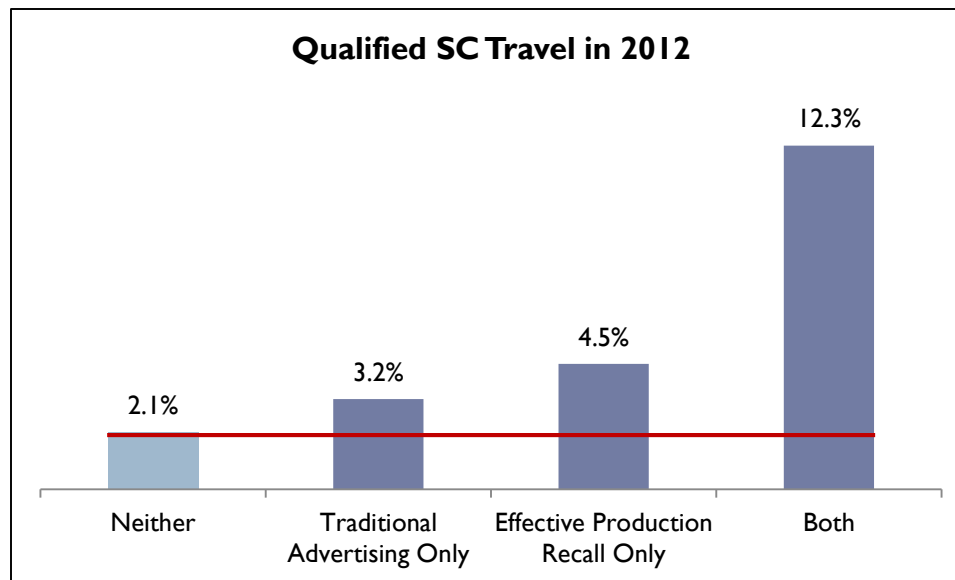
► Show this to Dudley.

Production/Advertising Overlap Impact

Awareness Combinations



Qualified SC Travel in 2012



- ▶ About half of the target audience is aware of the latest South Carolina traditional advertising and/or has effective recall of the selected productions.
- ▶ Given that the traditional advertising aired in 2012, incremental travel is assessed using qualified travel occurring in that calendar year.
- ▶ It seems that a synergy is created when the audience is exposed to the traditional advertising and the productions.
- ▶ The productions seem to have a greater solo impact than the traditional advertising, but it is important to remember that the traditional advertising is new and the production impact has built over many years.

Key Findings

- ▶ Three increasingly conservative quantitative research efforts and four focus groups have revealed that television and film productions undoubtedly influence leisure travel.
 - ▶ 54% of leisure travelers indicate that a production has influenced them to select a vacation destination.
 - ▶ 36% of leisure travelers report that they have visited a location or site that they saw in a production.
 - ▶ 6% of leisure travelers have visited South Carolina in the past 10 years and say that a TV show or movie was a major influence in the decision to visit.
- ▶ The most recent and most conservative estimate of incremental travel attributable to the selected South Carolina productions is 7.8%. This suggests that these productions may have influenced 1.6M household visits to South Carolina and approximately \$1.7B in travel revenue over the past ten years.
- ▶ The productions that are most likely to influence travel include TV shows about travel or food, romance/drama movies or TV shows, and sitcoms.
- ▶ The specific production attributes that are most likely to be a major influence on travel include coastal scenery, natural scenery, relaxation, historical sites, and iconic locations/landmarks.

Appendix: Questionnaire

South Carolina Tourism
Film Impact with Ad Awareness
September 2012

Thank you for participating in our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

First, what is your zip code? _____

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

- Me
- My spouse
- Jointly with my spouse
- Someone else

S2. How often do you or members of your household take out-of-state leisure vacations? This could be a day trip, a long weekend or a longer vacation anywhere outside your home state?

- Four or more times a year
- Two to three times a year
- Once a year
- Every two to three years
- I rarely take out of state leisure vacations
- I do not take leisure vacations

S4. Please take a moment to view the following video. INSERT TEST AD. Were you able to see and hear this video?

- Yes
- No

TERMINATE IF:

S1 = 2 OR 4 OR

S2 > 3 OR

S4 = 2

Q1. People choose vacation destinations for a number of reasons such as visiting friends, participating in a specific activity, relaxing, or even to visit a place that they have seen in a movie or television show.

Have you ever chosen a vacation destination because you wanted to visit a place that you saw in a...?

Please select all that apply.

- Action movie
- Drama movie
- Romance movie
- Comedy movie
- Reality TV show
- TV show about food

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- TV show about travel
- TV sitcom
- TV drama
- None of these

ASK Q1A IF SELECTED ANY AT Q1

Q1a. Please list the movies and/or television shows and the location that you visited:

Movie/Television Show	Location Visited

Q2. People participate in a variety of activities while on leisure trips/vacations. Some of these activities may not have been the main reason for selecting the destination. Besides any movies or television shows that influenced you to choose a destination, while on a trip have you ever visited a location that you saw in a...? Please select all that apply.

- Action movie
- Drama movie
- Romance movie
- Comedy movie
- Reality TV show
- TV show about food
- TV show about travel
- TV sitcom
- TV drama
- None of these

ASK Q2A IF SELECTED ANY AT Q2

Q2a. Please list the movies and/or television shows and the location that you visited:

Movie/Television Show	Location Visited

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Appendix: Questionnaire

ASK Q3 IF SELECTED ANY AT Q1 OR Q2

Q3. Think again about the movies and/or TV shows that have led you to select a trip destination or to visit a place while on a trip. To what degree did the following influence you?

ROTATE	Not an Influence	Minor Influence	Major Influence
I liked the <i>coastal scenery</i> (Beach, Ocean etc.) in the movies or TV shows			
I liked the <i>natural scenery</i> (Mountains, Lakes, Forests etc.) in the movies or TV shows			
I liked the rural or small town setting of the movies or TV shows			
I liked the Urban or Big City Setting of the movies or TV shows			
I wanted to visit the Iconic locations/landmarks from the movies or TV shows			
I wanted to see the distinctive architecture from the movies or TV shows			
I wanted to visit the restaurants and eat the local food that was in the movies or TV shows			
I wanted to visit the historical sites that were in the movies or TV shows			
I wanted to experience the night life that was in the movies or TV shows			
The movies or TV shows portrayed the place as very romantic.			
The movies or TV shows portrayed the place as very exciting, where adventure or thrills can be experienced.			
The movies or TV shows portrayed the place as very relaxing, where I could unwind.			
The movies or TV shows portrayed the place as somewhere that fantasy or mystery comes to life			
The portrayal of the place in the movies or TV shows captured my imagination.			
The characters' in the movies or TV shows led an idealistic lifestyle and I wanted to experience it for myself			
I wanted to re-create a specific scene from the movie or TV show			
I wanted to feel like I was part of the story that unfolded in the movie or TV show			
The Actors in the Movies or TV show endorsed the place and that made me want to go there			

Q4. How would you rate each of these states as a place to visit for a leisure trip?

	Poor	Fair	Good	Very Good	Excellent	Don't Know
Florida						
Georgia						
North Carolina						
South Carolina						
Virginia						
Tennessee						

Q5. How likely are you to visit the following states for a leisure trip in the next year?

	Not at all likely	Somewhat likely	Very likely
Florida			
Georgia			
North Carolina			
South Carolina			
Virginia			
Tennessee			

Q6. Which of the following states have you visited on a leisure trip at least once in the last ten years?

	Visited
Florida	
Georgia	
North Carolina	
South Carolina	
Virginia	
Tennessee	
None	

Q7. (ASK IF VISITED SOUTH CAROLINA)

- When did you last visit South Carolina? (DROP DOWN YEARS AND MONTH)
- How many times in the last **ten years** have you visited South Carolina?
- How many times in the last **year** have you visited South Carolina? ASK ONLY IF

7A=2011 OR 2012

ASK Q8 FOR SOUTH CAROLINA. IF NOT VISITED SOUTH CAROLINA, DO NOT ASK.

Appendix: Questionnaire

Q8. Thinking about the most recent trip to South Carolina....To what degree did each of the following motivate your decision to visit?

ROTATE	Not a motivator	Minor motivator	Major Motivator
A place we routinely visit			
A place we've been before, but don't routinely visit, and wanted to get back to			
Is a place you've seen on TV or in movies			
To explore new places			
Family lives nearby			
Saw an ad			
To get away and relax			
Heard about it from friends or family			
Have always wanted to go but never had the opportunity			
To take advantage of sale/package deal			
To combine vacation with business trip			
To go to an event			
Saw an article or story			
Received an email promotion			

Next we are going to show you some pictures from movies and TV shows. Please view the pictures and indicate if you have seen the movie or TV show.

INSERT VISUALS FOR TEST PRODUCTIONS (SHOW ALL VISUALS FOR EACH PRODUCTION ON THE SAME SCREEN).

ASK Q9 FOR ALL PRODUCTIONS

Dear John:

I:\Ads - Master\South Carolina\2011 Film Tourism\dear john\
Dear_John_1sheet.jpg
reading letter 1.jpg
kiss.jpg
thumb moon.jpg
reading letter 2.jpg

The Patriot:

I:\Ads - Master\South Carolina\2011 Film Tourism\Patriot\
The Patriot 13x19 poster.jpg
mel flag.jpg
family.jpg
mel speaking.jpg
ledger_patriot.jpg

The Notebook:

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I:\Ads - Master\South Carolina\2011 Film Tourism\notebook\
SCFO - The Notebook.jpg
boat.jpg
reading story.jpg
James.jpg
dance street.jpg

Army Wives:

I:\Ads - Master\South Carolina\2011 Film Tourism\army wives\
Army Wives.jpg
image 98.jpg
image 16.jpg
Image 5.jpg
image 14.jpg

Diners, Drive-Ins, and Dives:

I:\Ads - Master\South Carolina\2011 Film Tourism\Diners Drive-Ins and Dives
FN-Pkg_DDD-Header_s994x200
DDD Early Bird Charleston2
DDD Farmer's Shed Lexington2
DDD Fuel Cantina Charleston2
DDD Glass Onion Charleston2

Q9. Do you recall having seen this? FOR DINERS, DRIVE-INS AND DIVES SAY "DO YOU RECALL HAVING SEEN ANY OF THESE?"

- Yes
- No
- Don't know/not sure

ASK Q10 FOR EACH PRODUCTION SEEN

Q10. Do you recall in which state (PRODUCTION) was filmed?

- Florida
- Georgia
- North Carolina
- South Carolina
- Virginia
- Tennessee
- None of these/don't recall

Q10a. Do you recall in which state (PRODUCTION) storyline was set? DO NOT ASK FOR DINERS, DRIVE-INS AND DIVES.

- Florida
- Georgia
- North Carolina
- South Carolina
- Virginia

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Appendix: Questionnaire

- Tennessee
- None of these/don't recall

IF THEY HAVE VISITED SOUTH CAROLINA IN THE PAST 10 YEARS FROM Q6, ASK Q11 FOR EACH SOUTH CAROLINA PRODUCTION THEY HAVE SEEN

Q11. You mentioned that you visited South Carolina in MONTH AND YEAR FROM Q7A and that you have seen PRODUCTION, which was filmed/set in the state. When did you visit South Carolina in relation to viewing PRODUCTION?

- Before viewing
- After viewing
- Both before and after viewing

Q12. Thinking about your trip to South Carolina in MONTH AND YEAR, please estimate how much your total travel party spent on...

- a. Lodging _____
- b. Meals/Food/Groceries _____
- c. Attractions _____
- d. Recreational expenses such as boat rental, golf fees, etc. _____
- e. Novelties and Souvenirs _____
- f. Shopping _____
- g. Entertainment such as admission fees to events or shows _____
- h. Transportation such as gasoline, auto expenses, auto rental or flight costs _____
- i. Other _____

Next you will be shown some advertisements. Please view the ads and indicate if you have seen them before taking this survey.

ASK Q13 FOR EACH PRINT AD:

I:\Ads - Master\South Carolina\2012 Ads for Website Awareness Survey

1026_Southern_Living_September_2012.pdf

22166_PARENTS_Magazine_2012_KITE_LR.jpg

22216_BetterHomes+GardensMarch_FatherSon_AB_2012_LR.jpg

Q13. Have you seen this print ad before taking this survey?

- Yes
- No

TV AD:

I:\Ads - Master\South Carolina\2010 Ad Effectiveness\South Carolina\TV
60 Made for TV.jpg

http://sms9.omniproductions.net/SMC/SC10_SCTV1.flv

Q14. Have you seen this ad...

- ☐ On television
- ☐ Online
- ☐ Both on television and online

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☐ I have not seen this ad

ASK Q15 FOR EACH ONLINE AD

1. SCPRT_Leisure21_30k_300x250
<http://platform.mediaind.com/Eyeblaster.Preview.Web/Default.aspx?previewID=HjCn0W8HhlnztUMgUUP%2F3hLT3mncmhiaSmqJ9tFSWhTMyu8PeE6Q%3D%3D&AdID=8005392&lang=en-US>
2. SCPRT_Leisure23_30k_300x250
<http://platform.mediaind.com/Eyeblaster.Preview.Web/Default.aspx?previewID=ALAuM%2BjQoFP3f9Wffdhbs2NnN%2FVgpTu2fu6tKL%2FxmYoUltebeqgg%3D%3D&AdID=8005388&lang=en-US>
3. SCPRT_Leisure22_30k_728x90
<http://platform.mediaind.com/Eyeblaster.Preview.Web/Default.aspx?previewID=m0a%2B3IzYasBlexfOpnhUFeOnAQVxG8Kxipi33iuJ0uCrEhqULkAYQ%3D%3D&AdID=8005390&lang=en-US>
4. SCPRT_Leisure26_30k_728x90
<http://platform.mediaind.com/Eyeblaster.Preview.Web/Default.aspx?previewID=h1MvW4lfJStpKkyQUvm5nke2FeTtk7po30g%2BVUp%2B8gQt3yNwTstg%3D%3D&AdID=8005386&lang=en-US>

Q15. Have you seen this online ad before?

- ☐ Yes
- ☐ No

The following questions are for classification purposes only, and will help us understand different groups of people.

D1. What is your marital status?

- Married
- Divorced
- Widowed
- Single/Never married

D2. Including yourself, how many people are currently living in your household? _____

If D2 IS GREATER THAN 1:

D3. How many living in your household are children under the age of 18? _____

D4. Which of the following categories best represents the last grade of school you completed?

- High school or less
- Some College/Technical school
- College graduate
- Post graduate degree

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Appendix: Questionnaire

D5. Which of the following categories best represents the total annual income for your household before taxes?

- Less than \$20,000
- \$20,000 but less than \$30,000
- \$30,000 but less than \$50,000
- \$50,000 but less than \$70,000
- \$70,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 or more

D6. What is your age? _____

D7. Finally, are you willing to participate in follow-up research about this subject matter? The research could be a one-on-one interview or a focus group. You would be compensated for your time.

- Yes
- No

IF YES, ASK:

D8. Please provide the following contact information so that we may reach you for follow-up research

Name _____

Phone _____

Email _____

Appendix: South Carolina Productions

South Carolina Film

Dear John

Dear John: <http://www.imdb.com/video/imdb/vi3014853913/>



Dear_John_1sheet.jpg



reading letter 1.jpg



kiss.jpg



thumb moon.jpg



reading letter 2.jpg

The Patriot

The Patriot: <http://www.imdb.com/video/screenplay/vi535953689/>



thumb moon.jpg



mel flag.jpg



family.jpg



mel speaking.jpg



ledger_patriot.jpg

1

The Notebook

The Notebook: <http://www.imdb.com/video/screenplay/vi2603746073/>



SCFO - The Notebook.jpg



boat.jpg



reading story.jpg



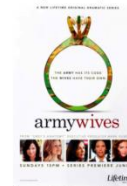
James.jpg



dance street.jpg

Army Wives

Army Wives (trailer for the 1st season): <http://www.imdb.com/video/screenplay/vi1969685785/>



Army Wives.jpg



image 98.jpg



image 16.jpg



Image 5.jpg



image 14.jpg

2

Appendix: South Carolina Productions

Diners Drive-Ins and Dives



DDD Early Bird Charleston2.bmp



DDD Farmer's Shed Lexington2.bmp



DDD Fuel Cantina Charleston2.bmp



DDD Glass Onion Charleston2.bmp



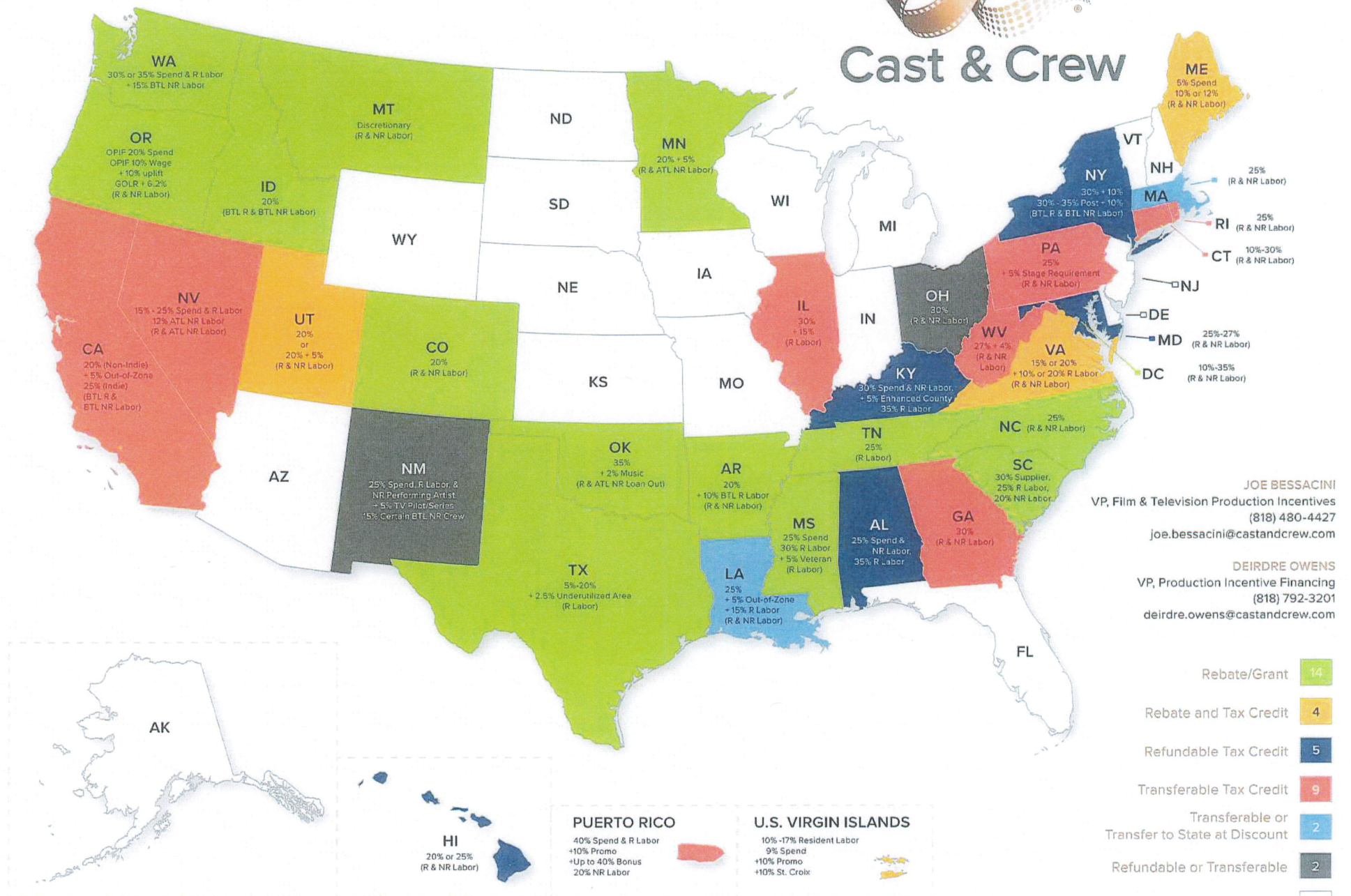
FN-Pkg_DDD-Header_s994x200.jpg

Appendix D. U.S. Production Incentives At-A-Glance (October 2017)

U.S. PRODUCTION INCENTIVES AT-A-GLANCE

OCTOBER 2017

Cast & Crew



R = Resident, NR = Nonresident, ATL = Above-the-Line, BTL = Below-the-Line

Attachment to SCPR's June 27, 2018
letter to the House Oversight Committee

STATE	INCENTIVE	TYPE OF INCENTIVE	PER PROJECT INCENTIVE CAP	FUNDING CAP	QUALIFIED LABOR	SUNSET DATE
Alabama	25% Spend & Nonresident Labor 35% Resident Labor	Refundable Tax Credit	No Cap*	\$20M Per Fiscal Year (10/1 – 9/30)	Each Resident & 1 st \$500k of Each BTL Nonresident, 1 st \$1M Each ATL Nonresident	None
Arkansas	20% +10% Below-the-Line Resident Labor	Rebate	No Cap	No Cap	1 st \$500k of Each Resident & Nonresident Subject to AR Tax	6/30/19
California ^(b)	20% (Non-Indie) +5% Out of Zone 25% (Indie)	Non-Transferable (Non-Indie) Transferable (Indie) Tax Credit	\$25M Non-Indie \$2.5M Indie	\$330M Per Fiscal Year (7/1 – 6/30)	Each Below-the-Line Resident & Below-the-Line Nonresident	6/30/20
Colorado	20%	Rebate	No Cap	\$750k FYE 6/30/2018	1 st \$1M of Each Resident & Nonresident	None
Connecticut	10%, 15%, 30%*	Transferable* Tax Credit	No Cap	No Cap	Each Resident & Nonresident*	None
District of Columbia	35% or 21% Spend* 30% Resident Labor 10% Nonresident Labor	Rebate	No Cap*	Discretionary	Each Resident & Nonresident*	None
Georgia ^(b)	20% +10% Promotion*	Transferable Tax Credit	No Cap	No Cap	1 st \$500k of Each Resident & Nonresident on W-2, otherwise no cap*	None
Hawaii	20% or 25%*	Refundable Tax Credit	\$15M	No Cap \$35M on 1/1/2019 Program Is Not Currently Funded	Each Resident & Nonresident Subject to HI Tax Each Below-the-Line Resident & Below-the-Line Nonresident	12/31/25 6/30/20
Idaho	20%	Rebate	\$500k	No Cap	1 st \$100k of Each Resident	5/6/21
Illinois	30% +15% Resident Labor - high poverty area*	Transferable Tax Credit	No Cap	No Cap	Each Below-the-Line & 1 st \$1M of Each Above-the-Line	None
Kentucky	30% Local Spend & Nonresident Labor +5% Enhanced County 35% Resident Labor	Refundable Tax Credit	No Cap	No Cap	Each Below-the-Line & 1 st \$1M of Each Above-the-Line	None
Louisiana ^(b)	25% +15% Resident Labor* + 5% Out-of-Zone + 5% VFX Costs	Transferable* Tax Credit	\$20M/\$25M	\$180M Per Fiscal Year* (7/1 – 6/30)	1 st \$3M of Each Resident & Nonresident*	6/30/2025
Maine	10% or 12% Wage* 5% Spend	Rebate Nontransferable Tax Credit	No Cap No Cap	No Cap No Cap	1 st \$50k of Each Resident & Nonresident NA	None
Maryland	25% or 27%*	Refundable Tax Credit	No Cap	\$5M FYE 6/30/2018	Each Resident & Nonresident Earning ≤ \$500k	None
Massachusetts	25% Payroll 25% Spend	Refundable*/ Transferable Tax Credit	No Cap	No Cap	Each Resident & Nonresident*	12/31/22
Minnesota	20%* +5%*	Rebate	No Cap	\$1M Biennium Ending 6/30/2019	Each Resident & 1 st \$400k/\$500k of Certain Nonresidents*	None
Mississippi	25% Local Spend 30% Resident Labor, + 5% Veteran*	Rebate	\$10M	\$20M Per Fiscal Year (7/1 – 6/30)	1 st \$5M of Each Resident Subject to MS W/H	None
Montana	Discretionary	Grant	No Cap	Discretionary	Each Resident & Nonresident	None
Nevada	15% - 25% Spend & Resident Labor* 12% ATL Nonresident Labor	Transferable Tax Credit	\$6M	\$10M Per Fiscal Year (7/1 – 6/30)	1 st \$750k of Each Resident & ATL Nonresident	None
New Mexico	25% Spend, Resident Labor, & Nonresident Performing Artists +5% TV Pilot/Series 15% Certain BTL Nonresident Crew	Refundable*/ Transferable Tax Credit	No Cap	\$50M Per Fiscal Year (7/1 – 6/30)	Each Resident, Nonresident Performing Artists*, Certain BTL Nonresident Crew	None
New York – Prod. & Post	30% +10%* 30% - 35% Post Only +10%*	Refundable Tax Credit	No Cap	\$395M Per Calendar Year \$25M Per Calendar Year	Each Below-the-Line Resident & Below-the-Line Nonresident	12/31/22
New York – Commercial	5% Downstate/Upstate 20% Growth	Refundable Tax Credit	Downstate/ Upstate - No Cap Growth - \$300k	\$7M Per Calendar Year	Each Below-the-Line Resident & Below-the-Line Nonresident	12/31/18
North Carolina	25%	Grant	\$5M Film \$9M TV Series \$250k Comm	\$34M FYE 6/30/2018 \$31M Each FY Thereafter	1 st \$1M of Each Resident & Nonresident	None
Ohio	30%	Refundable/Transferable Tax Credit	No Cap	\$40M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident	None
Oklahoma	35% +2% Music	Rebate	No Cap	\$4M Per Fiscal Year (7/1 – 6/30)	Each Resident & Above-the-Line Nonresident Loan Out*	6/30/24
Oregon	OPIF 20% Spend* OPIF 10% Wage* +10% uplift* GOLR + 6.2%*	Rebate	50% of Annual Funding	\$14M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Earning < \$1M*	12/31/23
Pennsylvania	25% +5% Minimum Stage Requirement	Transferable Tax Credit	20% of the Annual Cap	\$65M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Subject to PA W/H*	None
Puerto Rico	40% Spend & Resident Labor +10% Promo* +Up to 40% Bonus* 20% Nonresident Labor	Transferable Tax Credit	No Cap	\$50M Per Fiscal Year (7/1 – 6/30)	Each Resident	6/30/18
Rhode Island	25%	Transferable Tax Credit	\$5M*	\$15M Per Calendar Year	Each Resident & Nonresident	6/30/24
South Carolina	30% Supplier 25% Resident Labor 20% Nonresident Labor	Transferable Rebate	No Cap	Yes* Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Earning < \$1M	None
Tennessee	25%	Grant	No Cap	\$2M* Per Fiscal Year (7/1 – 6/30)	1 st \$250k of Each Resident	None
Texas ^(b)	5% - 20%* +2.5% Underutilized Area 10% - 17% Resident Labor	Grant	No Cap	\$22M For Biennium Ending 8/31/2019	1 st \$1M of Each Resident	None
U.S. Virgin Islands	9% QPE* +10% Promo* +10% SL Croix*	Transferable Tax Credit Rebate Rebate Rebate	No Cap No Cap No Cap No Cap	\$2.5M Per Calendar Year	1 st \$500k of Each Resident	None
Utah	20% +5% 20%	Refundable Tax Credit	No Cap	\$6.79M* Per Fiscal Year (7/1 – 6/30) \$1.5M	Each Resident & Nonresident*	None*
Virginia	15% or 20%* +10% or 20% Resident Labor* Discretionary*	Refundable Tax Credit Grant	At the Discretion of the Film Office	\$6.5M Per Fiscal Year (7/1 – 6/30) \$6M*	1 st \$1M of Each Resident & Nonresident Discretionary	12/31/21 None
Washington	Up to 30% or 35%* Up to 15% BTL Nonresident Labor*	Rebate	No Cap	\$3.5M Per Calendar Year	Each Resident & Below-the-Line Nonresident*	6/30/27
West Virginia	27% +4%* (10 or more Residents)	Transferable Tax Credit	No Cap	\$5M Per Fiscal Year (7/1 – 6/30)	Each Resident & Nonresident Subject to WV Tax	None

^(b) Local incentive may be available.

*Please visit our website at www.castandcrew.com for details and up-to-date information. These materials have been prepared as of October 1, 2017 by Cast & Crew Entertainment Services for informational purposes only and should not be construed as tax advice or relied on for specific production projects.

COMMITTEE CONTACT INFORMATION



- Website - <http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee.php>
- Phone Number - 803-212-6810
- Email - HCommLegOv@schouse.gov
- Location - Blatt Building, Room 228

END NOTES

¹ Visual Summary Figure 1 is compiled from information in the agency's study materials available online under "Citizens' Interest," under "House Legislative Oversight Committee Postings and Reports," and then under "Parks, Recreation, and Tourism, Department of"

<http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyPHPFiles/ParksRecreationandTourism.php> (accessed May 24, 2018).

² Confirmed accurate by Justin Hancock, SCPRT in April 2018.

³ Confirmed accurate by Justin Hancock, SCPRT in April 2018.

⁴ S.C. Code Ann. Section 51-1-10.

⁵ S.C. Code Ann. Section 51-1-60(a).

⁶ S.C. Code Ann. Section 51-1-60(b).

⁷ S.C. Code Ann. Section 51-1-60(i). Other than funds specifically allocated to it by legislative appropriation or bond authorization.

⁸ S.C. Code Ann. Section 51-1-60(g).

⁹ S.C. Code Ann. Section 51-1-60(h).

¹⁰ S.C. Code Ann. Section 51-1-60(f). Also, provided, that all such leases shall contain a clause to the effect that if such property ceases to be used as a recreation or park facility the lease shall be void and in the event of a conveyance the deed shall contain a clause providing that if such property ceases to be used as a recreation or park facility the title to such property shall revert to the department. All plans for the development of such lands shall be subject to the approval of the department and it shall retain the right to inspect such lands at such times as it considers necessary to determine if such lands are being used for parks and recreation.

¹¹ S.C. Code Ann. Section 51-1-60(g).

¹² S.C. Code Ann. Section 51-1-60(h).

¹³ S.C. Code Ann. Section 51-1-60(c).

¹⁴ S.C. Code Ann. Section 51-1-60(d). Also, no area, site, building, or other landmark shall be acquired for its historical significance without the approval of the Commission of Archives and History.

¹⁵ S.C. Code Ann. Section 51-1-60(e).

¹⁶ S.C. Code Ann. Section 51-1-60. Also, a survey shall be included to determine the land suitable and desirable to be acquired as a part of the state park and outdoor recreational system, due consideration being given to the scenic, recreational, archaeological, and other special features attractive to out-of-state visitors and to the people of the State. The results of this survey and study should be reported to the Governor and the General Assembly at the earliest practicable time.

¹⁷ Agency PER, Strategic Plan Summary.

¹⁸ Agency PER, Strategic Plan Summary.

¹⁹ Agency PER.

²⁰ Agency PER, Comprehensive Strategic Plan Chart and Strategic Plan Summary Chart; and email from Justin Hancock, SCPRT to Charles Appleby, House Legislative Oversight Committee staff, on July 31, 2018.

²¹ Department of Administration, Executive Budget Office, "2016-17 Accountability Report Technical Assistance Guide," under Agency Accountability Reports <http://www.admin.sc.gov/files/FY%202016-17%20Accountability%20Report%20Technical%20Assistance.pdf> (accessed July 21, 2017). See also, Agency PER.

²² Agency PER.

²³ Email from Justin Hancock, SCPRT, to Charles Appleby, House Legislative Oversight Committee, on May 17, 2018.

²⁴ Item numbers are the ones utilized in agency's program evaluation report.

²⁵ Item numbers are the ones utilized in agency's program evaluation report.

²⁶ Item numbers are the ones utilized in agency's program evaluation report.

²⁷ Item numbers are the ones utilized in agency's program evaluation report.

²⁸ S.C. House of Representatives, House Legislative Oversight Committee, "Letter from PRT to Oversight Subcommittee (June 27, 2018)," under "Committee Postings and Reports," under "House Legislative Oversight Committee," under "Parks, Recreation, and Tourism, Department of (DNR)," and under "Correspondence,"

<http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/Letter%20from%20SCPRT%20with%20attachments%20-%20Response%20to%20Subcommittee's%20letter.pdf> (accessed July 16, 2018). Question 8 through 11.

²⁹ S.C. House of Representatives, House Legislative Oversight Committee, "Letter from PRT to Oversight Subcommittee (June 27, 2018)," under "Committee Postings and Reports," under "House Legislative Oversight Committee," under "Parks, Recreation, and Tourism, Department of (DNR)," and under "Correspondence,"

<http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/>

Letter%20from%20SCPRT%20with%20attachments%20-%20Response%20to%20Subcommittee's%20letter.pdf (accessed July 16, 2018). Question 10.

³⁰ S.C. House of Representatives, House Legislative Oversight Committee, "Letter from PRT to Oversight Subcommittee (June 27, 2018)," under "Committee Postings and Reports," under "House Legislative Oversight Committee," under "Parks, Recreation, and Tourism, Department of (DNR)," and under "Correspondence," <http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/Letter%20from%20SCPRT%20with%20attachments%20-%20Response%20to%20Subcommittee's%20letter.pdf> (accessed July 16, 2018). Question 8 and 9.

³¹ S.C. House of Representatives, House Legislative Oversight Committee, "Economic Impact Study by AECOM (December 2011)," under "Committee Postings and Reports," under "House Legislative Oversight Committee," under "Parks, Recreation, and Tourism, Department of (DNR)," under "Products and Services of Agency," and under "Film Commission" [http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/Economic%20Impact%20Study%20of%20S.C.%20Film%20Commission%20\(December%202011\).pdf](http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/Economic%20Impact%20Study%20of%20S.C.%20Film%20Commission%20(December%202011).pdf) (accessed July 16, 2018).

³² Analysis of S.C.'s Film Incentives, AECOM (December 2011), page 5.

³³ S.C. Film Project Summary Report (2007-2011); SC Film Project Summary Report (2012); SC Film Project Summary Report (2013-2017); and phone call between Justin Hancock, SCPRT, and Charles Appleby, House Legislative Oversight Committee staff on August 2, 2018.

³⁴ S.C. House of Representatives, House Legislative Oversight Committee, "Impact Report by Strategic Marketing and Research, Inc. (January 2013)," under "Committee Postings and Reports," under "House Legislative Oversight Committee," under "Parks, Recreation, and Tourism, Department of (DNR)," under "Products and Services of Agency," and under "Film Commission" [http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/S.C.%20Film%20Impact%20Report%20by%20SMARI%20\(January%202013\).pdf](http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/S.C.%20Film%20Impact%20Report%20by%20SMARI%20(January%202013).pdf) (accessed July 16, 2018).

³⁵ *Film Impact Qualitative and Quantitative Research*, Strategic Marketing and Research, Inc. (January 2013), page 25.

³⁶ S.C. House of Representatives, House Legislative Oversight Committee, "Letter from PRT to Oversight Subcommittee (June 27, 2018)," under "Committee Postings and Reports," under "House Legislative Oversight Committee," under "Parks, Recreation, and Tourism, Department of (DNR)," and under "Correspondence," <http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/Letter%20from%20SCPRT%20with%20attachments%20-%20Response%20to%20Subcommittee's%20letter.pdf> (accessed July 16, 2018). Question 11.

³⁷ S.C. House of Representatives, House Legislative Oversight Committee, "U.S. Production Incentives Summary Report (Oct. 2017)," under "Committee Postings and Reports," under "House Legislative Oversight Committee," under "Parks, Recreation, and Tourism, Department of (DNR)," under "Products and Services of Agency," and under "Film Commission" [http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/U.S.%20Production%20Incentives%20Summary%20Report%20\(Oct.%202017\).pdf](http://www.scstatehouse.gov/CommitteeInfo/HouseLegislativeOversightCommittee/AgencyWebpages/ParksRecreationTourism/U.S.%20Production%20Incentives%20Summary%20Report%20(Oct.%202017).pdf) (accessed July 16, 2018).

³⁸ Item numbers are the ones utilized in agency's program evaluation report.

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