Panama City Beach, Florida 2016 Festivals Surveys

Prepared for:

- Panama City Beach Convention and Visitors Bureau

Study Conducted: January – December, 2016
Final Report Submitted – April, 2017

Young Strategies, Inc.
Charlotte, NC

Panama City Beach Convention and Visitors Bureau
Travel Market Research

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Panama City Beach Convention and Visitors Bureau

Purpose

The Panama City Beach Convention & Visitors Bureau (PCBCVB) retained Young Strategies, Inc. (YSI) to conduct intercept interviews with visitors at various festivals/events as part of the visitor research being conducted to document the profile and planning preferences of those who attended a festival or event in Panama City Beach, Florida. The festival intercept survey captures the perceptions of Panama City Beach (PCB) as a destination, and the attractors that induce day trips, overnight visits, multiple night-stays, and repeat visitation.

Methodology

The intercept surveys were designed to capture a range of typical travelers who are attending festival/events in PCB. A collection goal of 120 surveys per event was forecasted; survey collection varied based on actual festival attendance. The survey questionnaire consisted of 14 questions with all visitor responses recorded by members of the YSI research team. A method of random selection was used to identify festival/event guests to be interviewed.

The YSI research team conducted the interviews at the following festivals/events: Seabreeze Jazz Festival, Thunder Beach Spring , Jeep Jam(New in 2016), Chasin' the Sun, Pirates of the High Seas, Thunder Beach Fall, Emerald Coast Cruzin' Car Show, Home for the Holidays, and New Year's Eve Beach Ball Drop. Interviews were conducted in the afternoon and early evening hours.

Seabreeze Jazz Festival

April 20-24, 2016

N=125

Seabreeze Jazz Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews on five days at a random series of locations throughout Aaron Bessant Park.

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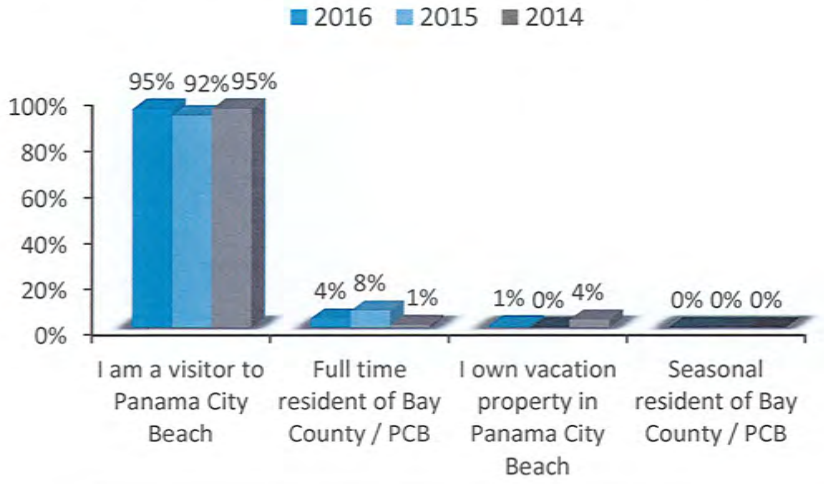
Summary of Festival Survey Responses

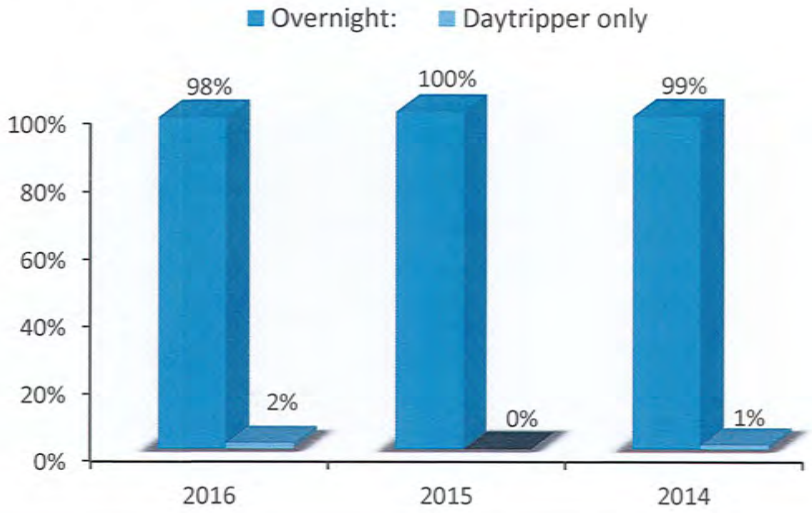
Seabreeze Jazz Festival Survey Response Summary

- Respondents were an average age of **54.8** with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Baby Boomer (50-67) – 74.2%**
  - **Generation X (29-49) – 17.7%**
  - Generation Y (18–28) – 0.8%
  - Silent Generation (67-89) – 7.3%
- 60% of respondents were female, and 40% were male.
- Festivals visitors were well educated – 68% of respondents had a college degree or higher, while an additional 22% had attended some college.
- 100% of respondents reported an adult only travel party.
- Point-of-origin – Respondents came from **20 states** with the largest portion of respondents from **Florida (26%)**, followed by Georgia and then Alabama.
- Pre-trip planning – **44%** come to the festival every year, followed by **28% planning 4-6 months prior to their visit**.
- Average length of stay in PCB = 4.3 nights in 2016 and 2015; 67% reported a lodging expenditure.
- Average party size attending the festival was 3.4 with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.56, compared to a rating of 4.41 in 2015.
- Overall rating of Seabreeze Jazz Festival was a 4.59 which is up from the 2015 rating of 3.92, but still slightly lower than 2014's rating of 4.69 on a 5-point scale.
- Average party spending while in PCB: $1,057.73.

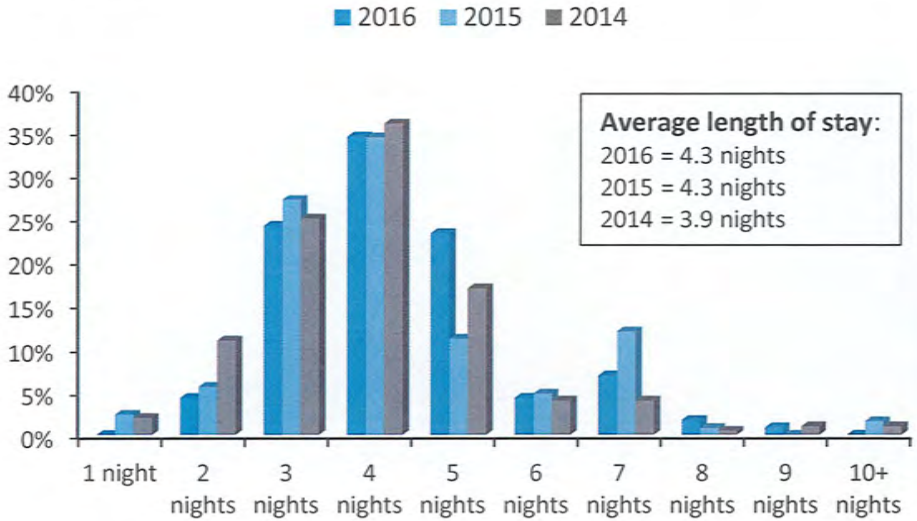
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=125



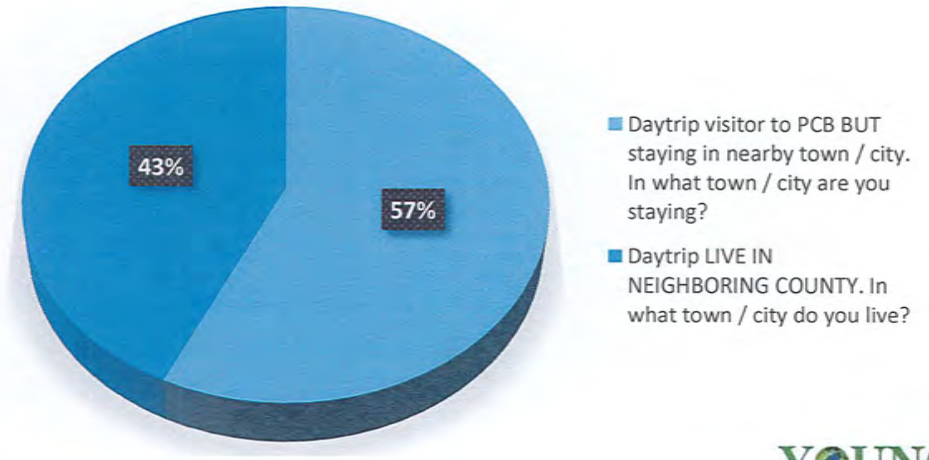
Are you staying in PCB overnight? n=125



Please specify the number of nights you are staying during this visit to PCB. n=116



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=7



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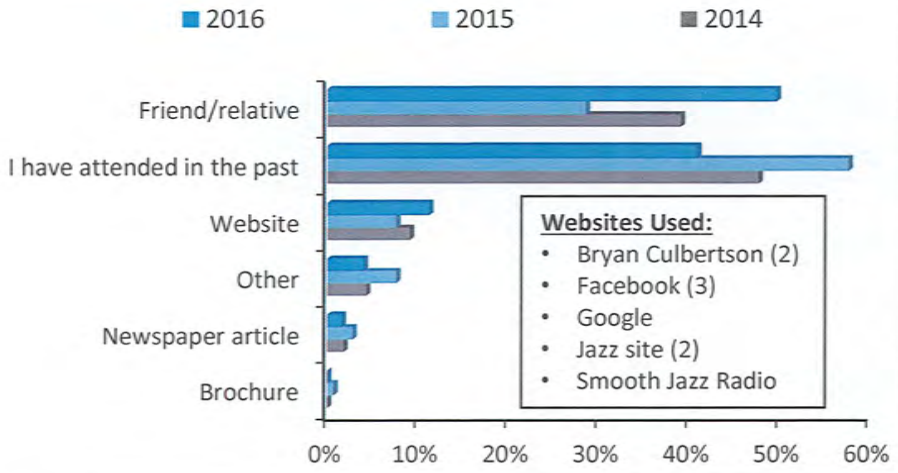
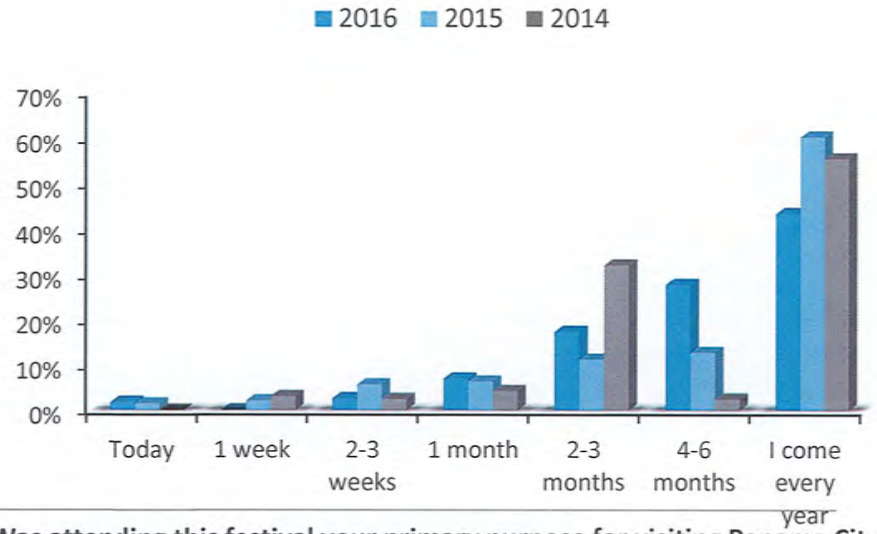
Trip Planning and Purpose

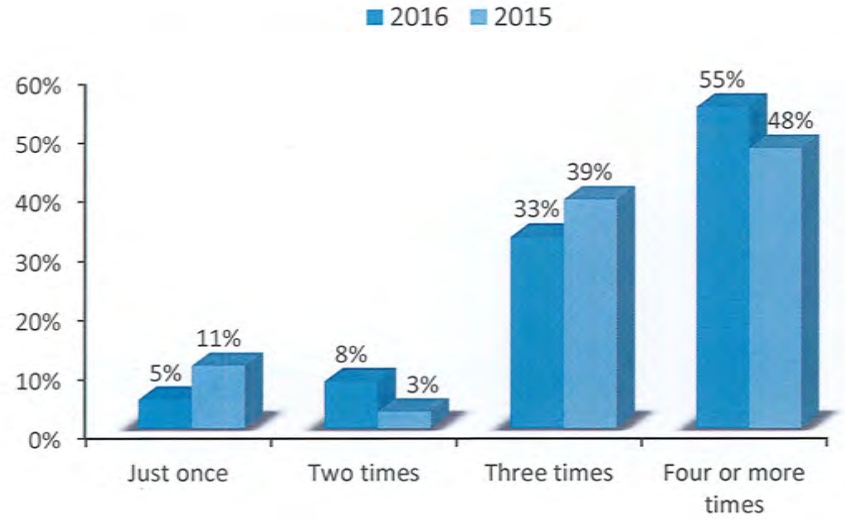
How did you find out about the festival? n=125



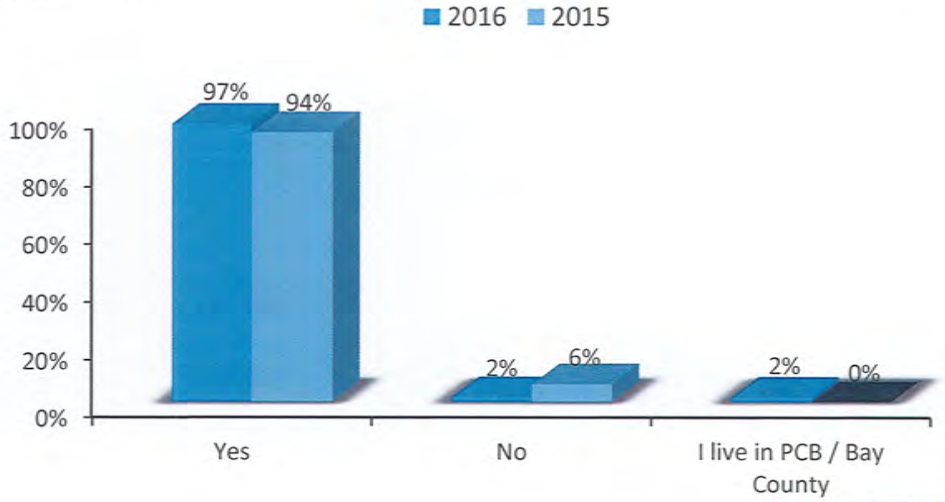
How far in advance did you plan to attend this festival/event? n=115



Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=123



Was attending this festival your primary purpose for visiting Panama City Beach? n=122



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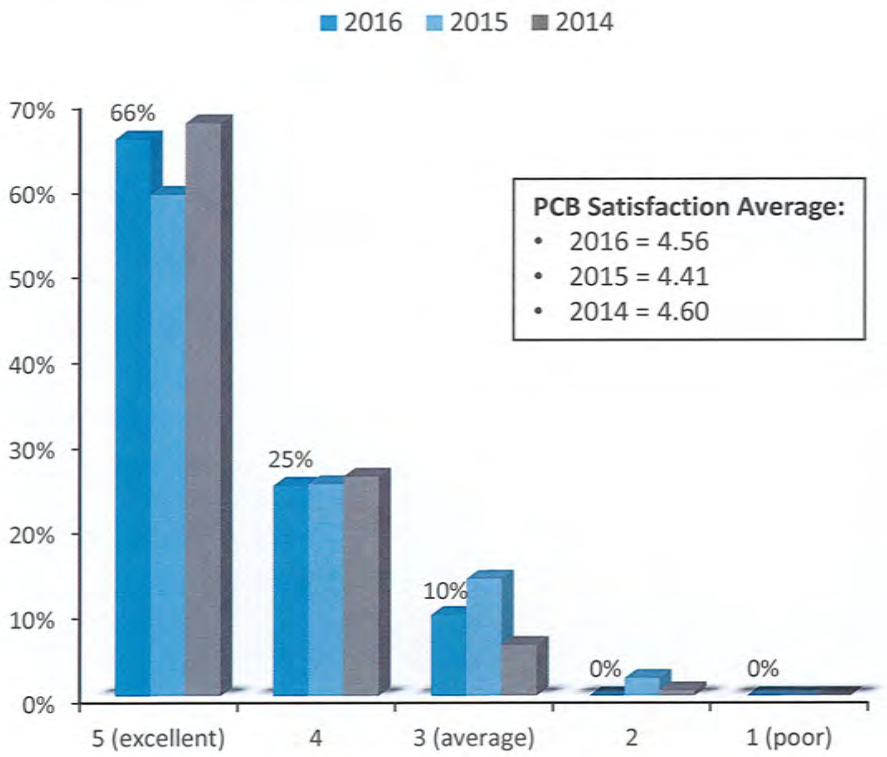
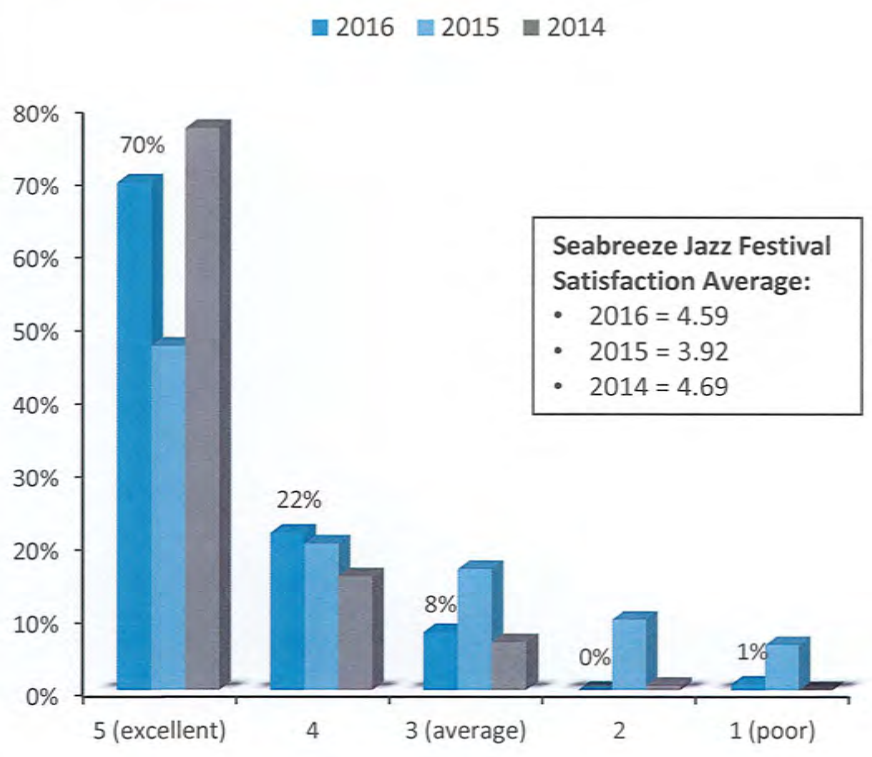
Panama City Beach Convention and Visitors Bureau
Seabreeze Jazz Festival

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=125



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Seabreeze Jazz Festival? n=125



Observations:
- Overall trip satisfaction to Panama City Beach increased from 4.41 in 2015 to 4.56 in 2016.
- Seabreeze Jazz Festival overall satisfaction was down in 2015 to 3.92 but increased significantly in 2016 to 4.59, on a 5-point scale. 70% of respondents rated their visit to the festival as excellent in 2016 compared to 48% in 2015.

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Panama City Beach Convention and Visitors Bureau
Seabreeze Jazz Festival

Travel PARTY Spending (Total Trip)

Spending Category	2016	2015
Lodging	$842.19	$964.19
(% of reporting)	(67.2%)	(81.9%)
Dining/Food	$330.83	$333.81
(% of reporting)	(57.6%)	(89.6%)
Shopping	$241.40	$216.26
(% of reporting)	(34.4%)	(66.0%)
Bars/Nightclubs	$207.50	$160.00
(% of reporting)	(9.6%)	(34.0%)
Local Transportation	$50.00	$176.54
(% of reporting)	(0.8%)	(74.3%)
Tickets/Admissions	$200.00	$96.00
(% of reporting)	(9.6%)	(4.2%)
Average Total Spending Per Travel Party	**$1,057.73***	**$1,499.17***
(% of reporting)	(76.0%)	(88.9%)
Average total # in Travel Party	***3.4***	***3.1***
Average Length of Stay	***4.3 nights***	***4.3 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Verbatim Comments:

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- Destin
- Lynn Haven
- PCB
- WA County

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Lynn Haven
- PCB (2)

How did you find out about the festival?

Other:

- Fourth year
- Heard in past
- Second year
- Tenth year
- Third year

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Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

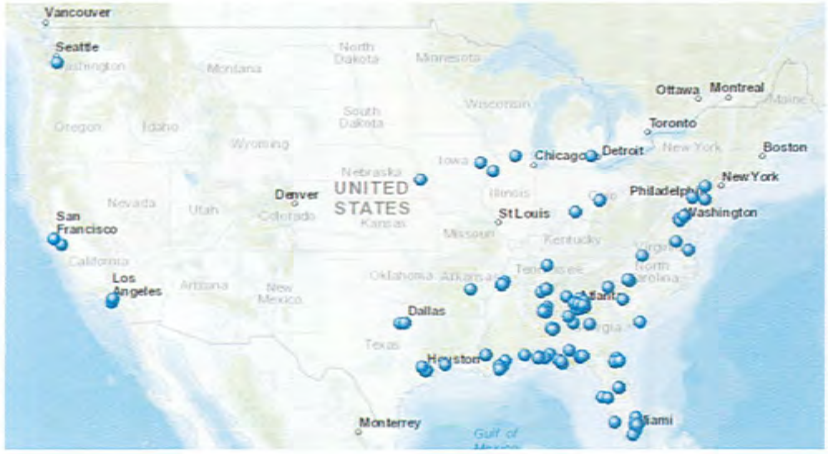
1. **Allow coolers**
2. **Parking / Traffic in and out**
3. **New vendors**

- All nice- classy
- Allow coolers
- Arm bands
- Art booths
- Art vendors missing
- Band- need to be tweaked
- Bands bad- E money
- Bands- food and water
- Better than last year
- Better vendors!
- Bring in coolers
- Bring water/ snacks in
- Bring your own water in.
- Bring your own water inside.
- Can't bring in items- water, medicine, (healthy foods)
- Cash or debit. Band was bad.
- Chairs
- Cooler month
- Coolers allowed.
- Coolers with water
- Different wristband.
- Dj between acts
- Does not like money on band.
- Food back in. Vendors - bad
- General seating shade
- Hard drinks/ bands/ chairs
- Healthy food
- Healthy food options.
- Healthy food vendors
- Impoole chip - bandLet coolers come in
- Little more shade.
- Mixed drinks - need vendors
- More discount pkgs
- More diverse acts.
- More entrance gates and general admissions seating
- More food vendors - vegetarian
- More talent- different
- More vendors.
- New vendors. Bands are a pain
- No healthy food (gluten free) new vendors from previous years. Celiac -- provide a letter and allow them to bring it in
- No shade
- Not happy with venue. VIP gold couldn't get blue or other because sold out. - Always sold out. Gold not worth it. Too far for drinks. Too hard to get back off bracelet.
- On the beach
- Only complaint is no healthy food choices
- Parking (3)
- Parking and shade
- Parking-getting out
- Rather pay cash then with bands. More trash cans. Expected more for money on reserved seats. Chairs uncomfortable.
- Really liked first year. Changed last 2 years. Bring your own coolers. Food allergies
- Reasonable accommodations
- Red chairs are so uncomfortable
- Seating-chair quality. Vendors - bad. Coolers
- Security a little harsh.
- Shade
- Shuttle busses, smile by staff
- Smokers in VIP
- Speed up time getting in gate.
- Sunscreen booth needed
- Town shuts down early
- Trees/ shade
- Trouble with wristband - paul taylor
- Vendors
- Vendors-bad no art/toilets/duty
- Vendors-need new ones. Chairs are bad.
- Water price!
- Water/ ice
- Would like to see new artists. Waited for listin to buy tickets.
- Wristbands - not good. Vendors not as good from past - need more space

Panama City Beach Convention and Visitors Bureau

Seabreeze Jazz Festival

2016 Respondent Point of Origin



2015 Respondent Point of Origin

State - City							
FLORIDA- 25.6%		Jonesboro	1	San Francisco	1	**ARKANSAS- 0.8%**	
Jacksonville	5	LaGrange	1	San Jose	1	Little Rock	1
Tallahassee	4	Rome	1	**VIRGINIA- 4.0%**		**ILLINOIS- 0.8%**	
Ft Lauderdale	3	Stone Mountain	1	Alexandria	1	Roscoe	1
Panama City Bch	3	Tyrone	1	Arlington	1	**MICHIGAN- 0.8%**	
Orlando	2	Union City	1	Hamptonm	1	Northville	1
Pensacola	2	**ALABAMA- 11.2%**		Martinsville	1	**MISSISSIPPI- 0.8%**	
Pompano Beach	2	Birmingham	3	Richmond	1	Southhaven	1
Bonita Spring	1	Montgomery	3	**N. CAROLINA- 2.4%**		**NEBRASKA- 0.8%**	
Brandon	1	Fairfield	2	Charlotte	3	Bellevue	1
Chipley	1	Madison	2	**OHIO- 2.4%**		**WASHINGTON- 0.8%**	
Clearwater	1	Bessemer	1	Columbus	2	Auburn	1
Crestview	1	Mobile	1	Cincinnati	1		
Fort WaLton	1	Pelham	1	**PENNSYLVANIA- 2.4%**			
Homestead	1	Trinity	1	Easton	1		
Lynn Haven	1	**LOUISIANA- 8.0%**		Leola	1		
Miami	1	New Orleans	5	Philadelphia	1		
Navarre	1	Zachary	2	**S. CAROLINA- 2.4%**			
Wellington	1	Marrero	1	Charleston	1		
GEORGIA- 20.8%		Metairie	1	Columbia	1		
Atlanta	4	Slidell	1	Greenville	1		
Lawrenceville	3	**TEXAS- 6.4%**		**TENNESSEE- 2.4%**			
Marietta	3	Houston	3	Memphis	2		
Conyers	2	Beaumont	1	Nashville	1		
Lithonia	2	Cypress	1	**IOWA- 1.6%**			
Alpharetta	1	Dallas	1	Davenport	1		
Bonaire	1	Fort Worth	1	Marion	1		
Decatur	1	Grand Prairie	1	**MARYLAND- 1.6%**			
Dublin	1	**CALIFORNIA- 4.0%**		Laurel	1		
Ellerslie	1	Pasadena	2	Odenton	1		
Huntsville	1	Los Angeles	1				

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Thunder Beach Spring Rally

April 27 – May 1, 2016

N=125

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews April 27th – May 1st at a random series of locations throughout Frank Brown Park and at the Harley Dealership.

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Panama City Beach Convention and Visitors Bureau
Thunder Beach Spring Rally

Summary of Festival Survey Responses

Thunder Beach Festival Reponse Summary

- Respondents were an average age of **50.4** with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Baby Boomer (50-67) – 54%**
  - **Generation X (29-49) – 39%**
  - Generation Y (18-28) – 4%
  - Silent Generation (69-86) – 3%
- 46% of respondents were female, and 54% were male.
- 28% of respondents had a college degree or higher, while an additional 27% had attended some college.
- 99.2% of respondents reported an adult only travel party, while 0.8% were families traveling with children.
- Point-of-origin – Respondents came from **17 states** with the largest portion of respondents from **Alabama (33%)**, followed by Florida and then Georgia.
- Pre-trip planning – **79%** come to the festival every year, followed by **8% plan 4-6 months prior to their visit**.
- Average length of stay in PCB was 3.9 nights.
- Average party size attending the festival was 4.4, with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.83, while overall rating of Thunder Beach Spring Rally was 4.75.
- Average party spending while in PCB: **$1,099.77**

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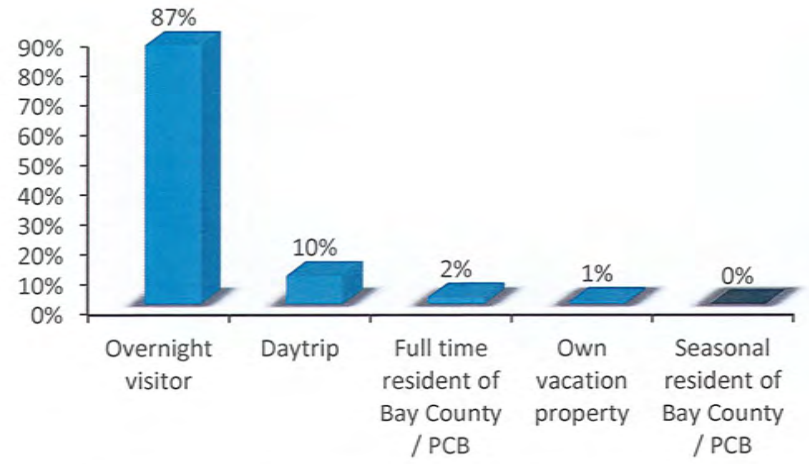
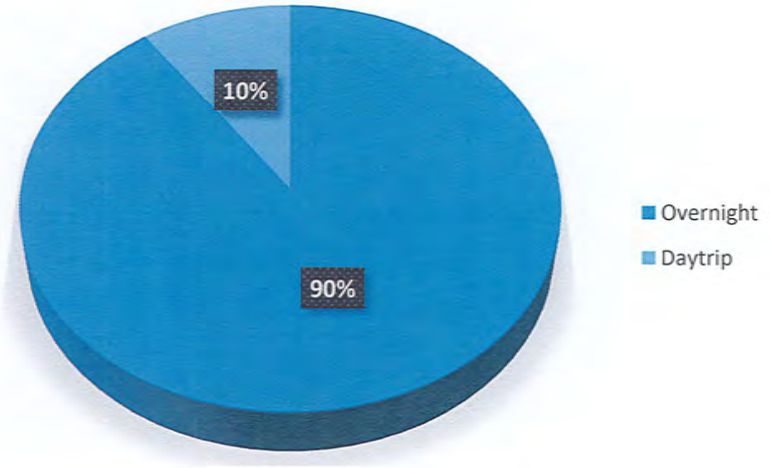
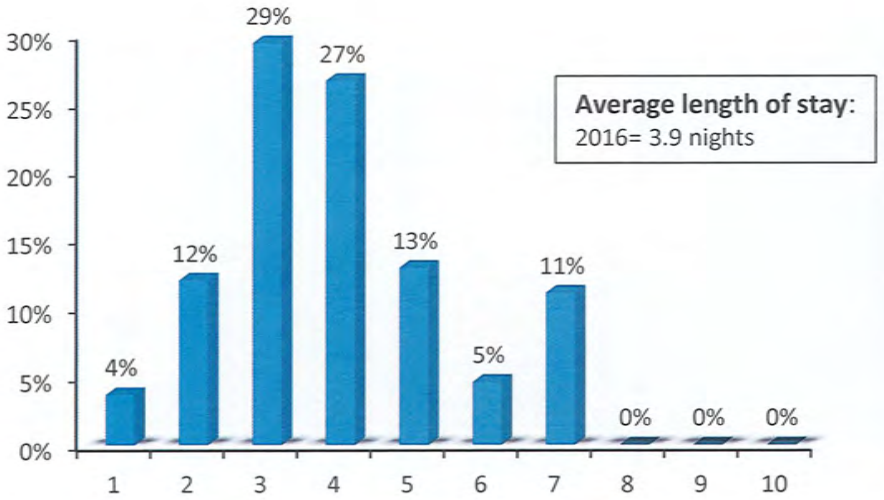
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=125



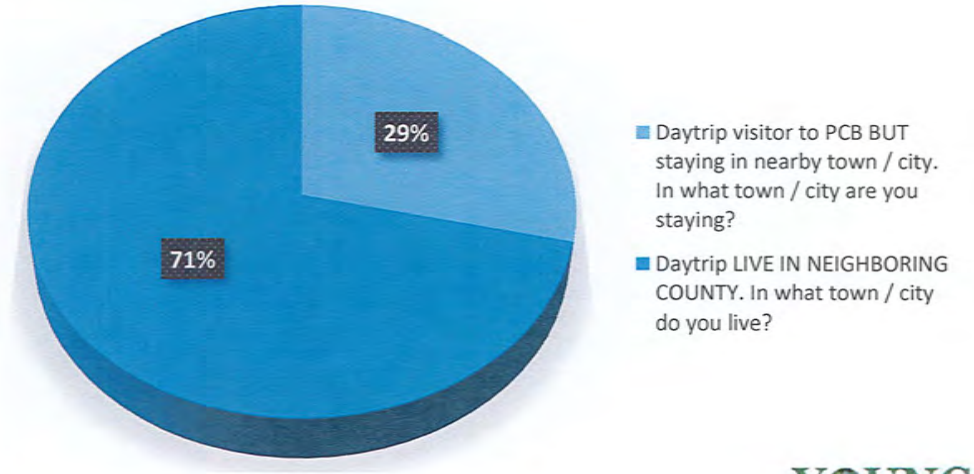
Are you staying in PCB overnight? n=121



Please specify the number of nights you are staying during this visit to PCB. n=109



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=7



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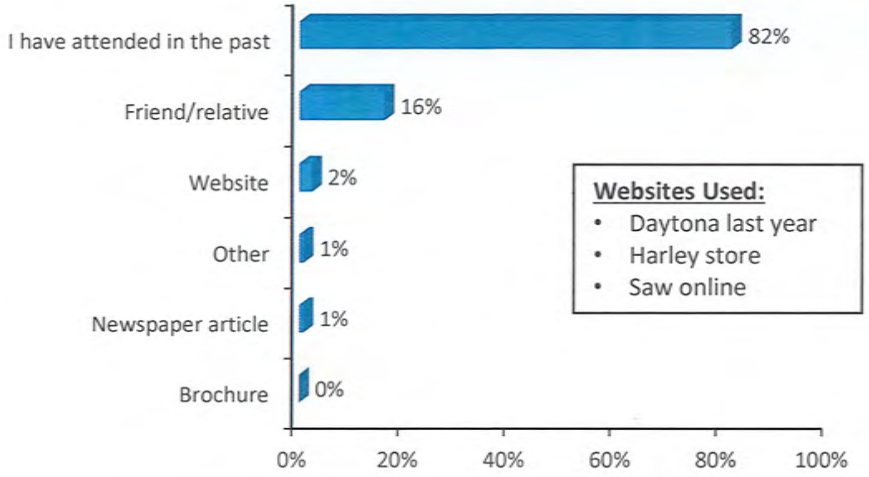
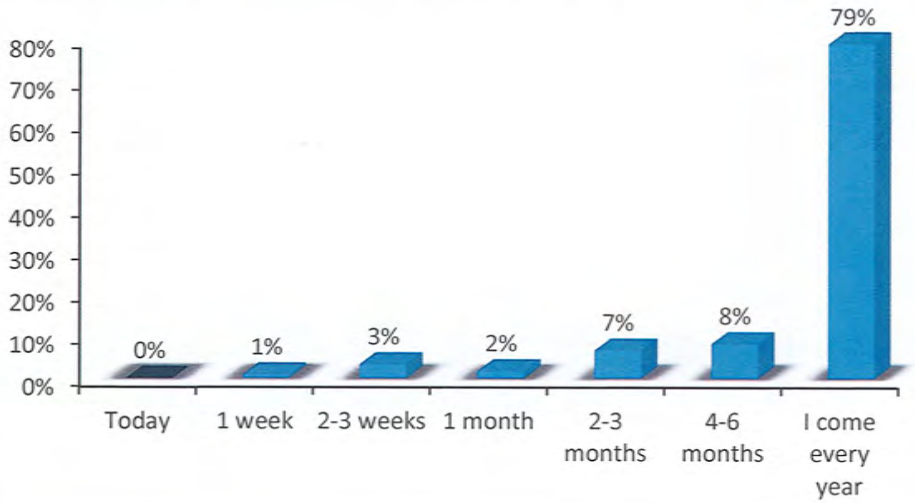
Trip Planning and Purpose

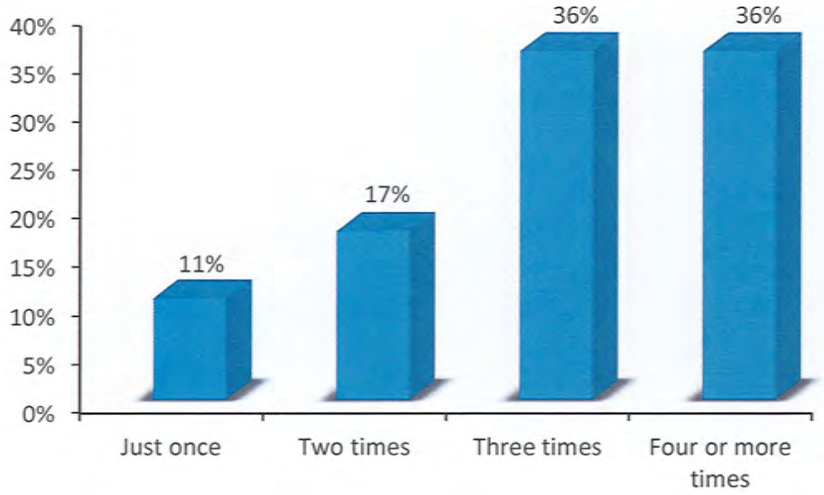
How did you find out about the festival? n=125



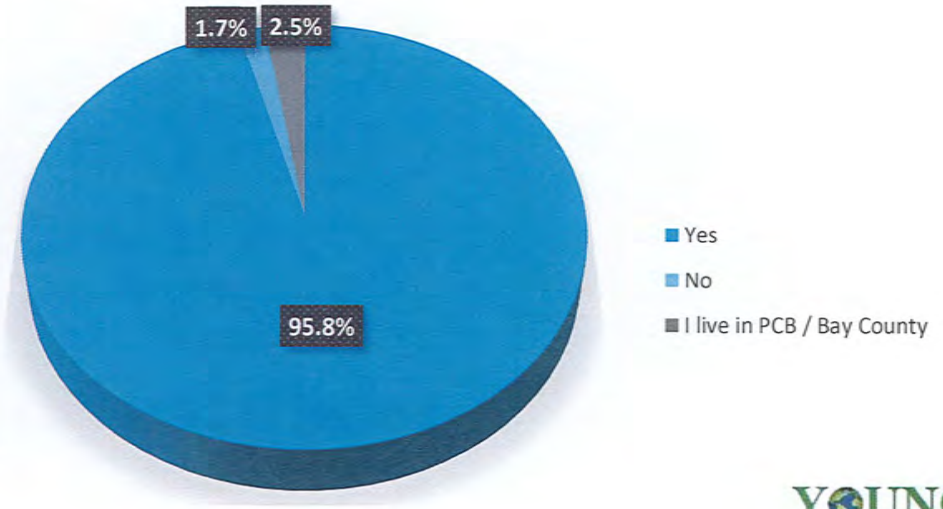
How far in advance did you plan to attend this festival/event? n=120



Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=86



Was attending this festival your primary purpose for visiting Panama City Beach? n=118



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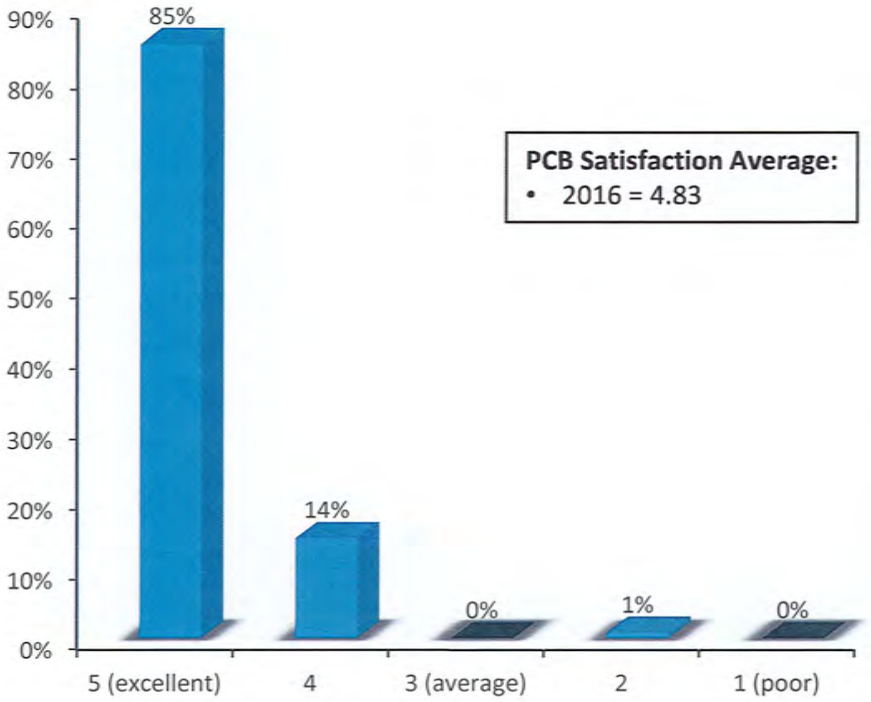
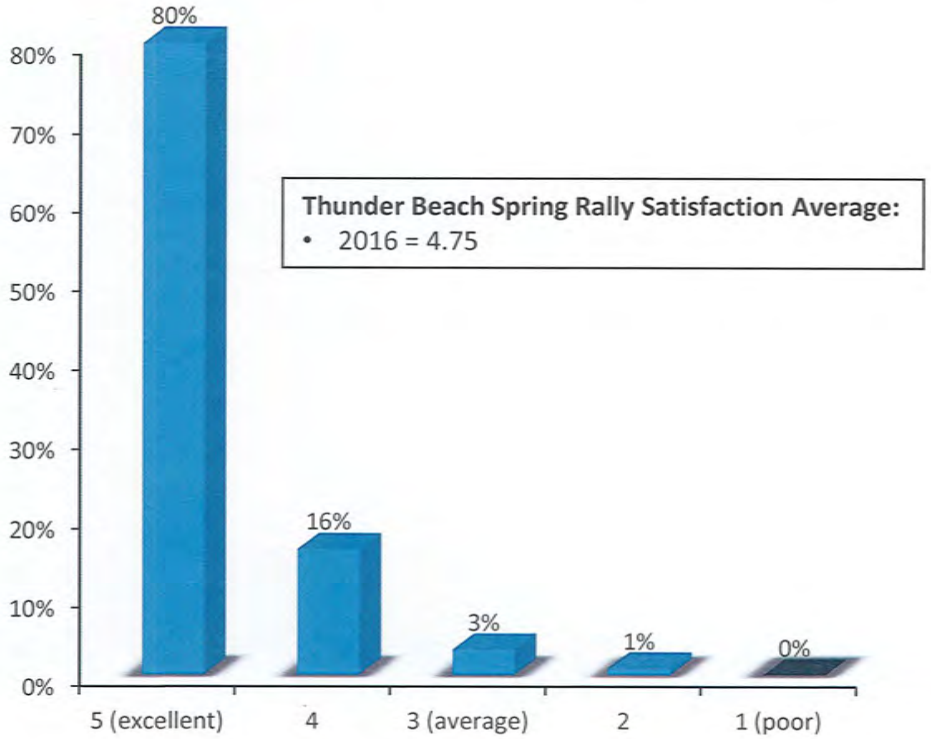
Panama City Beach Convention and Visitors Bureau
Thunder Beach Spring Rally

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=125



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Thunder Beach Spring Rally? n=125



Observations:
- Overall trip satisfaction to Panama City Beach is high at 4.83, while the festival satisfaction was rated at 4.75 on a 5-point scale.

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Travel PARTY Spending (Total Trip)

Spending Category	2016
Lodging	$669.82
(% of reporting)	(63.2%)
Dining/Food	$341.08
(% of reporting)	(74.4%)
Shopping	$277.56
(% of reporting)	(64.0%)
Bars/Nightclubs	$167.65
(% of reporting)	(39.2%)
Local Transportation	$56.05
(% of reporting)	(16.0%)
Tickets/Admissions	$0.00
(% of reporting)	(0.0%)
Average Total Spending Per Travel Party	**$1,099.77***
(% of reporting)	(80.0%)
Average total # in Travel Party	***4.4***
Average Length of Stay	***3.9 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

1. **Need more vendors**
2. **More venues**
3. **Traffic**

- Didn't update 7.B. With info
- Expensive
- Good bands, cleaner than Daytona
- Less vendors this year
- More stops
- Need more venues
- Shuttles
- T.B.P. Not open wed
- Traffic (2)
- Vendor setup better- more
- Vendor-maps
- Vendors- not as many
- Vendors- not as many
- Vendors- super expensive
- Venues- more of them needed

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- Destin
- Kinard

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Bonifay
- Brantley, AL
- Freeport, FL (2)
- Pensacola, FL

How did you find out about the festival?

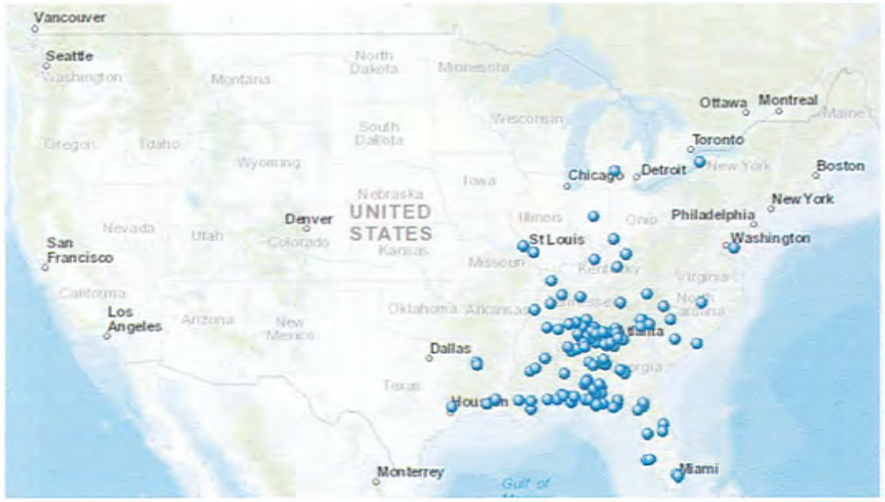
Other:

- TV

Panama City Beach Convention and Visitors Bureau

Thunder Beach Spring Rally

2016 Respondent Point of Origin



State - City							
ALABAMA- 32.8%		Sterrett	1	Cave Spring	1	Knoxville	1
Geneva	2	Thomasville	1	Cordele	1	Medina	1
Leesburg	2	Trussville	1	Fayetteville	1	Munford	1
Phenix City	2	Valley	1	Forsyth	1	**KENTUCKY- 3.2%**	
Rainsville	2	Wetumpka	1	Jasper	1	Flemingsburg	1
Altoona	1	**FLORIDA- 23.3%**		Kingston	1	Louisville	1
Andalusia	1	Bonifay	3	Loganville	1	Paducah	1
Anniston	1	Panama City	3	Vienna	1	Richmond	1
Arab	1	Freeport	2	**LOUISIANA- 5.6%**		**N.CAROLINA- 2.4%**	
Athens	1	Lake City	2	Bossier City	2	Newton	1
Bessemer	1	Pensacola	2	Denham Springs	1	Raleigh	1
Brantley	1	Tallahassee	2	Eunice	1	Waxhaw	1
Cottondale	1	Branford	1	Iowa	1	**ILLINOIS- 0.8%**	
Crossville	1	Brooksville	1	Mandeville	1	Belleville	1
Cullman	1	Cottondale	1	New Orleans	1	**INDIANA- 0.8%**	
Daleville	1	Crawfordville	1	**MISSISSIPPI- 4.8%**		Windfall	1
Dothan	1	DeLand	1	Biloxi	1	**MARYLAND- 0.8%**	
Dozier	1	Englewood	1	Florence	1	North Beach	1
Gadsden	1	Fort Lauderdale	1	Golden	1	**MICHIGAN- 0.8%**	
Grand Bay	1	Hollywood	1	New Albany	1	Holt	1
Hanceville	1	Milton	1	Pelahatchie	1	**MISSOURI- 0.8%**	
Huntsville	1	Niceville	1	Philadelphia	1	St. Peters	1
Laceys Spring	1	Panama City Bch	1	**S. CAROLINA- 4.8%**		**NEW YORK- 0.8%**	
Leighton	1	Port Charlotte	1	Anderson	1	N. Tonawanda	1
Midland City	1	Sopchoppy	1	Easly	1	**OHIO- 0.8%**	
Mobile	1	Wewahitchka	1	Fountain Inn	1	Cinicnnati	1
Moody	1	Winter Springs	1	Myrtle Beach	1	**TEXAS- 0.8%**	
New Market	1	**GEORGIA- 12.0%**		Pickens	1	Spring	1
Northport	1	Carrollton	2	Sumter	1		
Opelika	1	Douglasville	2	**TENNESSEE- 4.8%**			
Robertsdale	1	Andersonville	1	Big Sandy	1		
Shorter	1	Atlanta	1	Harrison	1		
Spanish Fort	1	Canton	1	Johnson City	1		

YOUNG strategies, inc.

Jeep Beach Jam

May 11 – May 15, 2016
N=127

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews May 11th – May 15th at a random series of locations throughout Aaron Bessant Park.

Panama City Beach Convention and Visitors Bureau

Jeep Beach Jam

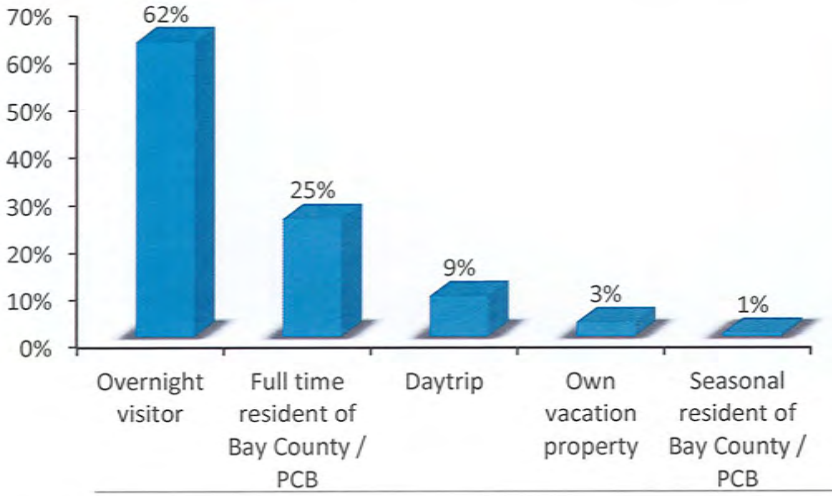
Summary of Festival Survey Responses

Jeep Beach Jam Festival Reponse Summary

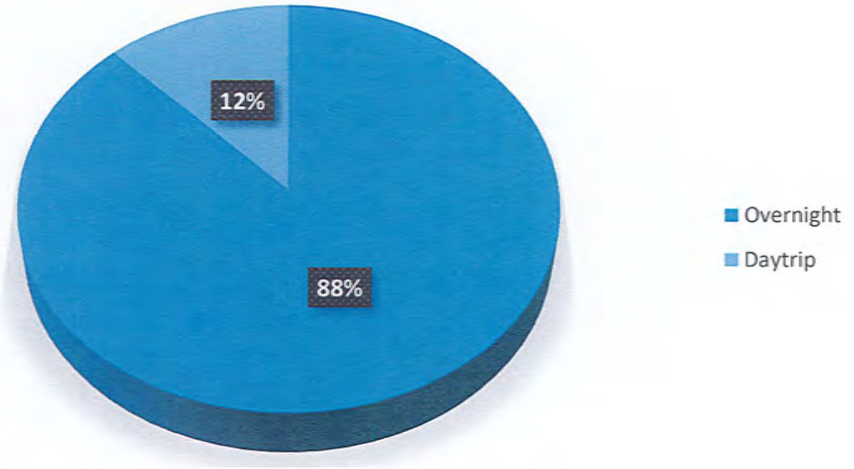
- Respondents were an average age of **45** with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Generation X (29-49) – 47%**
  - **Baby Boomer (50-67) – 40%**
  - Generation Y (18-28) – 13%
  - Silent Generation (69-86) – 0%
- 44% of respondents were female, and 60% were male.
- 29% of respondents had a college degree or higher, while an additional 38% had attended some college.
- 95.3% of respondents reported an adult only travel party, while 4.7% were families traveling with children.
- Point-of-origin – Respondents came from **10 states** with the largest portion of respondents from **Florida (43%)**, followed by Georgia and then Alabama.
- Pre-trip planning – **35% planned their trip 2-3 months in advance**, followed by **30% planning 4-6 months prior**.
- Average length of stay in PCB was 3.6 nights.
- Average party size attending the festival was 2.8, with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.88, while overall rating of Jeep Beach Jam was 4.41.
- Average party spending while in PCB: **$891.23**

YOUNG strategies, inc.

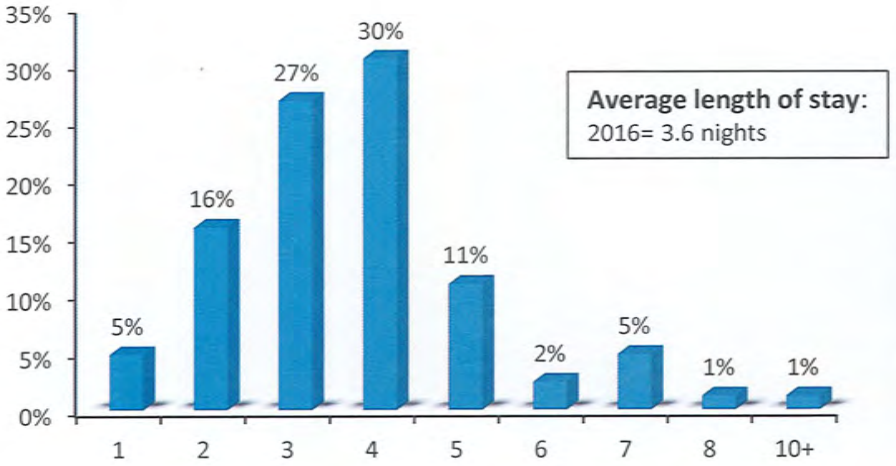
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=127



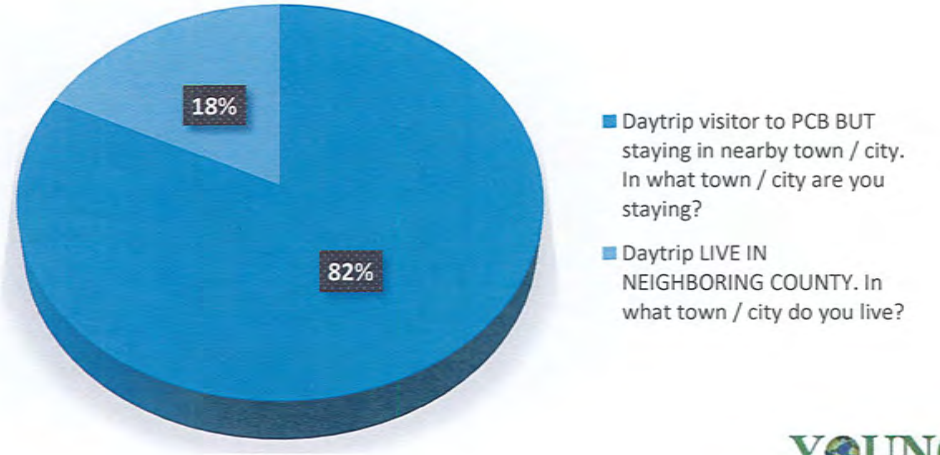
Are you staying in PCB overnight? n=127



Please specify the number of nights you are staying during this visit to PCB. n=82



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=17



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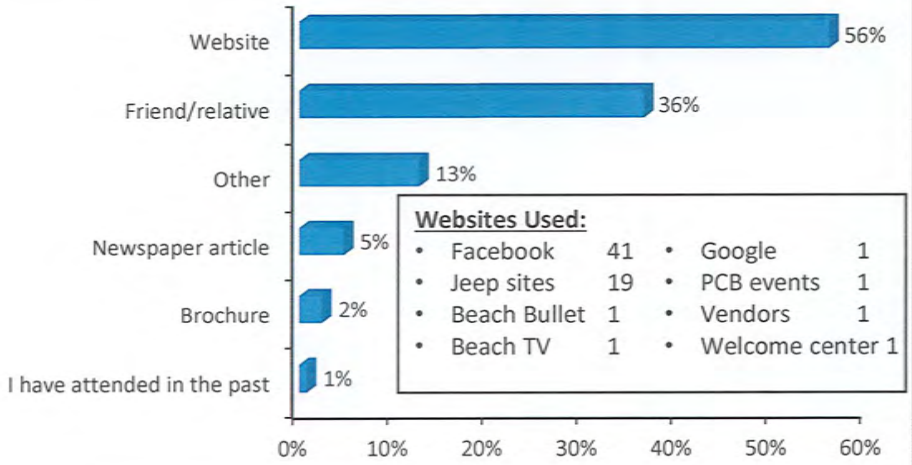
Panama City Beach Convention and Visitors Bureau
Jeep Beach Jam

Trip Planning and Purpose

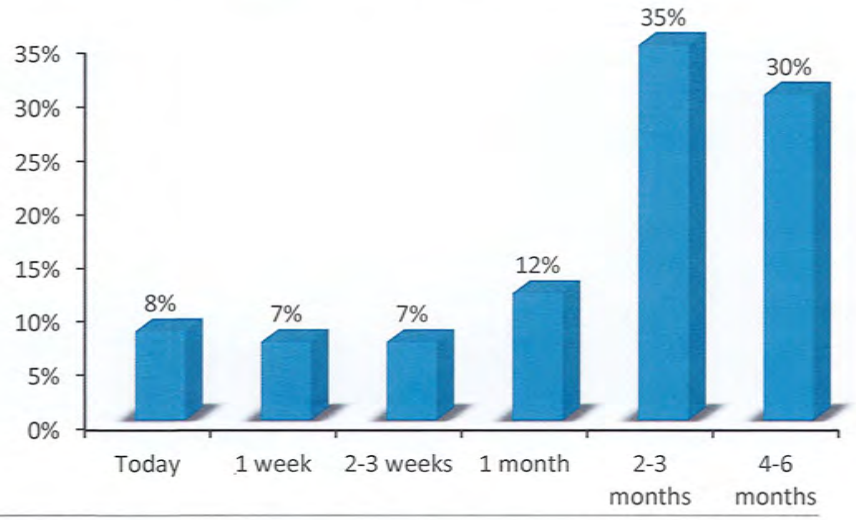
How did you find out about the festival? n=127



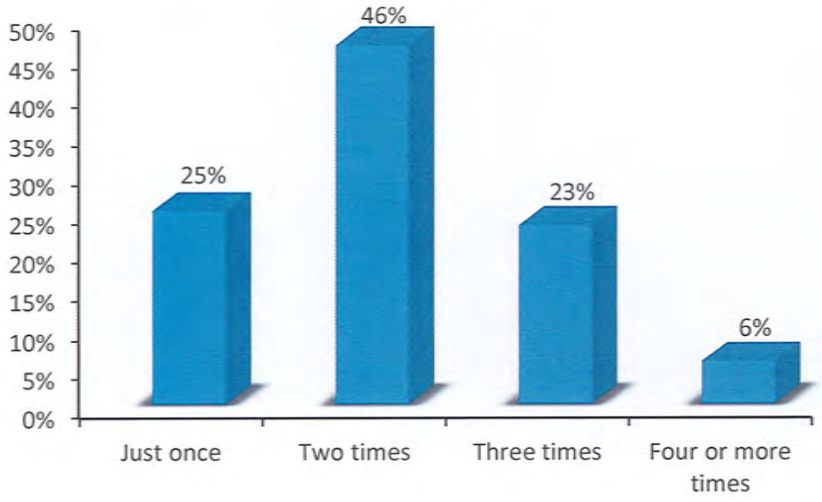
Websites Used:

• Facebook	41	• Google	1
• Jeep sites	19	• PCB events	1
• Beach Bullet	1	• Vendors	1
• Beach TV	1	• Welcome center	1

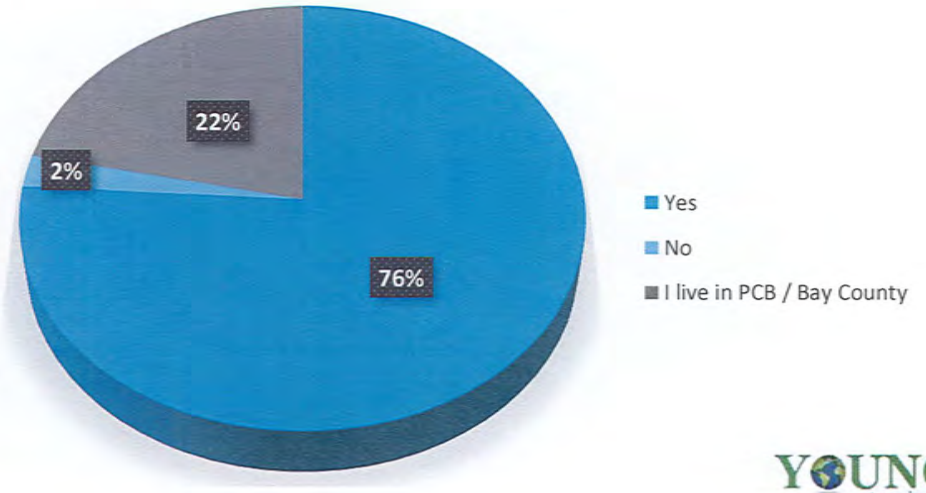
How far in advance did you plan to attend this festival/event? n=109



Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=108



Was attending this festival your primary purpose for visiting Panama City Beach? n=125



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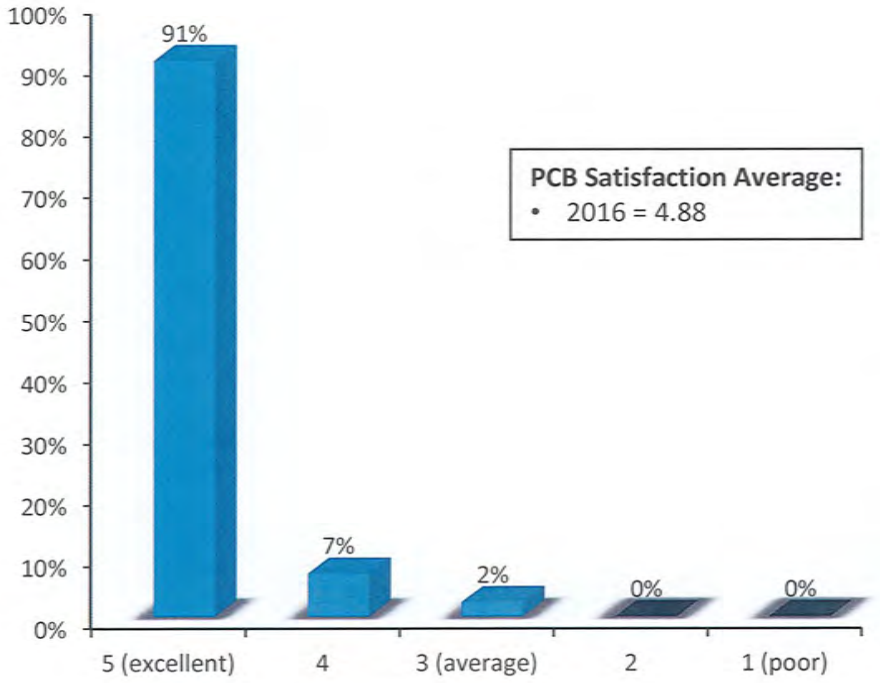
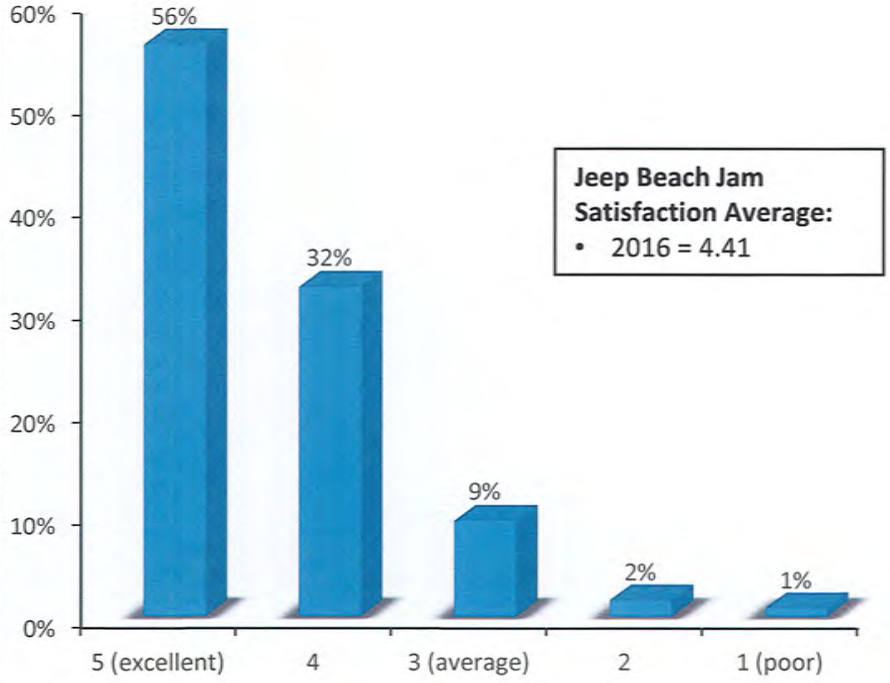
Panama City Beach Convention and Visitors Bureau
Jeep Beach Jam

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=127



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Thunder Beach Spring Rally? n=127



Observations:
- Overall trip satisfaction to Panama City Beach was high at 4.88, while the festival rated at 4.41 on a 5-point scale

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Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

1. **Need more vendors**
2. **More advertising / signage**
3. **Improve obstacle course**

- $20.00 to see vendors- need more vendors
- 1st year
- 1st year- good
- 1st year- never got what was offered when signed up
- Better bands
- Better directions - no signs
- Better parking - towing was happening at bars
- Better trail
- Charged 20$ web said 15$
- Dirt roads - bad. Arm bands and tickets - bad
- Good food selection - on site mechanic
- Keep obstacle course open longer
- Mister fans- shade
- More advertising
- More daytime activities
- More girl vendors
- More jeeps on display
- More speakers and vendors
- More vendors (4)
- More vendors - open later
- Need more signs- parade times/line up
- Needs better organization
- No clinics; not doing what's advertised
- Obstacle course - need to improve
- Okay for first year.
- Parking is bad
- Poker run - later in week - Friday
- Signs
- Signs - need more
- Signs - not good itinerary
- Signs - parade directions
- Signs - where to register
- Signs are bad
- Signs need to be better
- Signs need to be better
- Too expensive to visit vendors
- Unorganized - obstacle course
- Vendor - more
- Vendors - buy stuff here
- Vendors - shut early
- Vendors - stay open more
- Viewing stand for obstacle course
- Wrist bands bad - nothing going on Wednesday and Thursday

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- Callaway
- Chipley, FL
- Crestview, FL
- Destin, FL (4)
- Niceville, FL
- Okaloosa Island
- Panama City (5)
- Port St Joe

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Bonifay
- Brantley, AL
- Freeport, FL (2)
- Pensacola, FL

How did you find out about the festival?

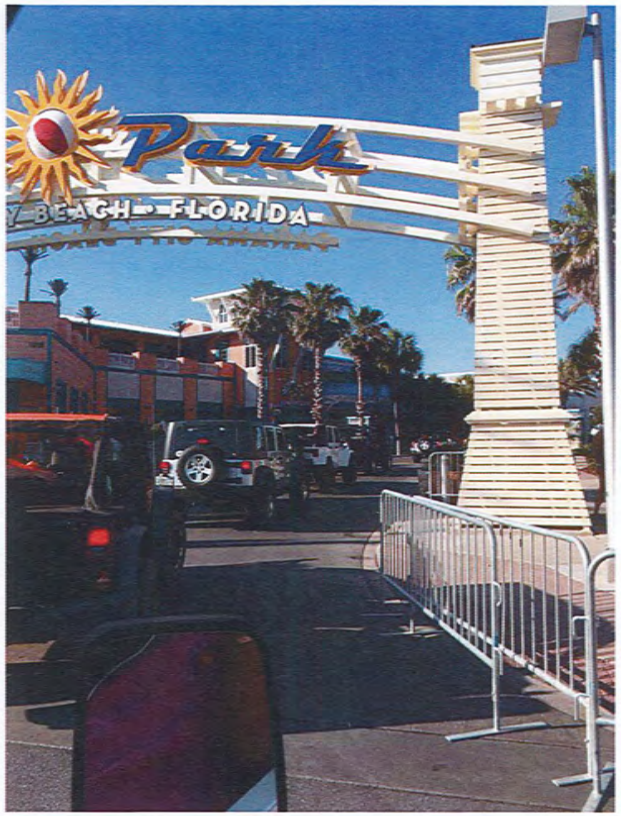
Other:

- Card in mail
- Jeep - stickers
- Jeep beach – Daytona (2)
- Jeep club (5)
- Jeep owners
- Own 2 jeeps
- Postcard - vendor
- Saw a jeep at condo
- Sticker on jeep (2)
- Stickers put on jeep

Panama City Beach Convention and Visitors Bureau
Jeep Beach Jam

Travel PARTY Spending (Total Trip)

Spending Category		2016
Lodging	(% of reporting)	$435.42 (51.2%)
Dining/Food	(% of reporting)	$286.51 (67.7%)
Shopping	(% of reporting)	$205.35 (55.9%)
Bars/Nightclubs	(% of reporting)	$358.80 (39.4%)
Local Transportation	(% of reporting)	$43.48 (19.7%)
Tickets/Admissions	(% of reporting)	$300.00 (0.8%)
Average Total Spending Per Travel Party	(% of reporting)	**$891.23*** (76.4%)
Average total # in Travel Party		***2.8***
Average Length of Stay		***3.6 nights***



***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

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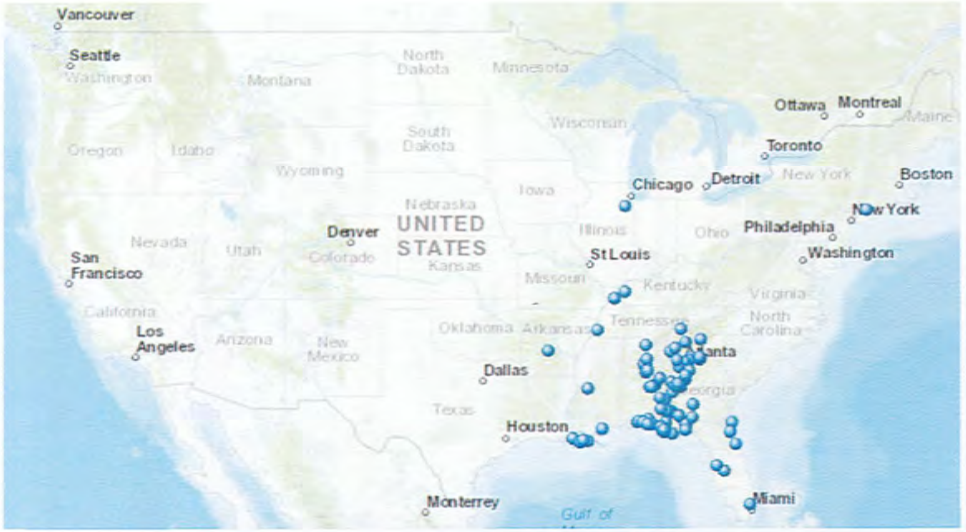
Panama City Beach Convention and Visitors Bureau

Jeep Beach Jam

2016 Respondent Point of Origin



State - City					
FLORIDA – 43.3%		Cherry Log	1	Pittsview	1
Panama City Beach	16	Clayton	1	Troy	1
Panama City	8	Columbus	1	Valley	1
Lynn Haven	5	Dallas	1	Wetumpka	1
Destin	3	Dahlonega	1	**LOUISIANA – 5.5%**	
Milton	3	Decatur	1	Houma	5
Crawfordville	2	Ellerslie	1	Larose	1
Niceville	2	Lawrenceville	1	Patterson	1
Tallahassee	2	Locust Grove	1	**MISSISSIPPI – 3.1%**	
Callaway	1	Midlan	1	Bay Saint Louis	2
Chiley	1	Midland City	1	Clinton	2
Chipley	1	Palmetto	1	**KENTUCKY – 2.4%**	
Crestview	1	Rex	1	Paducah	2
Fernandina Beach	1	Rome	1	Marion	1
Havana	1	Waverly Hall	1	**TENNESSEE – 1.6%**	
Lakeland	1	Zebulon	1	Athens	1
Land O Lakes	1	**ALABAMA – 19.7%**		Atoka	1
Palm Coast	1	Dothan	4	**ARKANSAS – 0.8%**	
Pensacola	1	Prattville	3	Malvern	1
St. Johns	1	Hayden	2	**CONNECTICUT – 0.8%**	
Walton	1	Mount Olive	2	Stratford	1
Weston	1	Alabaster	1	**ILLINOIS – 0.8%**	
Wewahitchka	1	Alexander City	1	Elwood	1
GEORGIA – 22.0%		Birmingham	1		
Athens	3	Chelsea	1		
Brinson	2	Enterprise	1		
Sylvester	2	Louisville	1		
Thomasville	2	Madison	1		
Atlanta	1	Millbrook	1		
Box Springs	1	Pansey	1		
Calhoun	1	Phenix City	1		

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Chasin' the Sun Festival

September 23 & 24, 2016
N=68

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews September 23 & 24 at a random series of locations throughout Aaron Bessant Park.

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Panama City Beach Convention and Visitors Bureau
Chasin' the Sun

Summary of Festival Survey Responses

Chasin' the Sun Festival Reponse Summary

- Respondents were an average age of **57** with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Baby Boomer (50-67) – 66%**
  - **Generation X (29-49) – 18%**
  - Silent Generation (68-86) – 13%
  - Generation Y (18-28) – 3%
- 64% of respondents were female, and 36% were male.
- 45% of respondents had a college degree or higher, while an additional 28% had attended some college.
- 92.6% of respondents reported an adult only travel party, while 7.4% were families traveling with children.
- Point-of-origin – Respondents came from **13 states** with the largest portion of respondents from **Florida (37%)**, followed by Alabama and then Georgia.
- Pre-trip planning – 40% of respondents said they planned their visit the day of the event, while another 40% planned inside of 1 month.
- Average length of stay in PCB = 3.8 nights - with 44% reporting a lodging expenditure.
- Average party size attending the festival was 2.7 with 2 being the most frequent response.
- PCB visitor satisfaction rated highly at 4.78(on a 5-point scale) compared to 4.40 in 2014.
- Visitor rating of Chasin' the Sun Festival was 4.78 which is significantly higher that the 2014 rating of 3.55.
- Average party spending while in PCB: **$745.51**, slightly lower than 2015 total spend of $786.42

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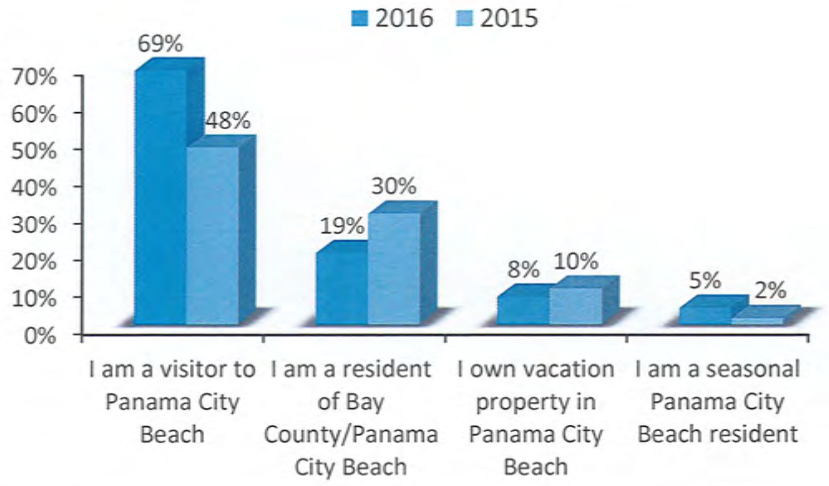
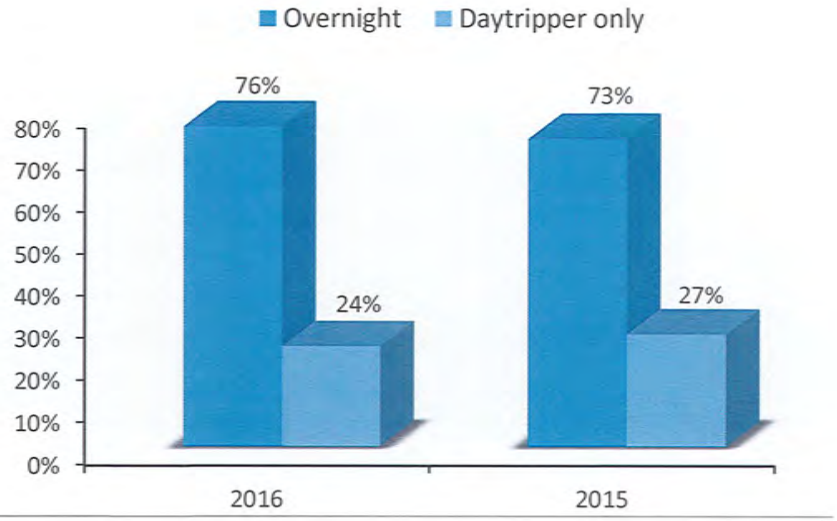
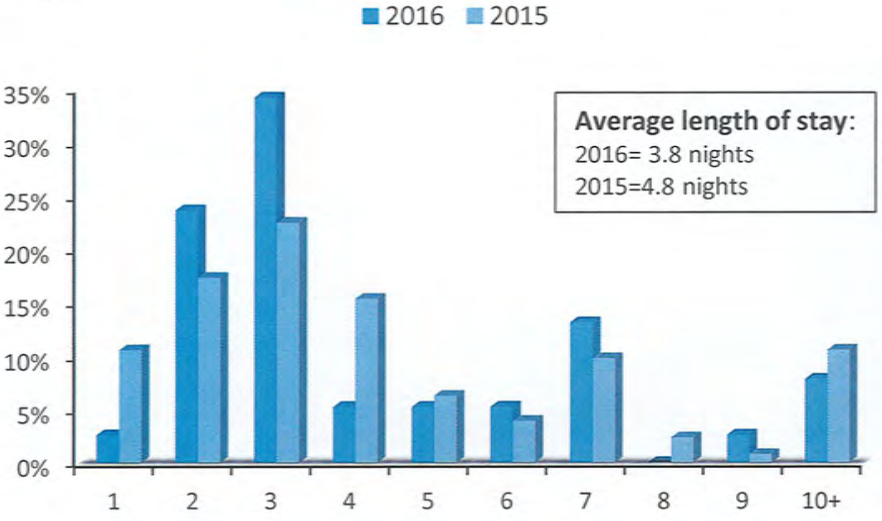
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=67



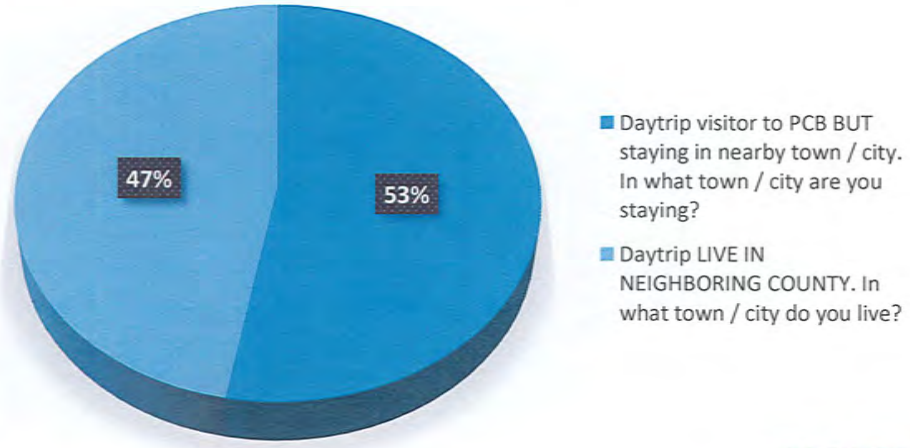
Are you staying in PCB overnight? n=46



Please specify the number of nights you are staying during this visit to PCB. n=38



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=17



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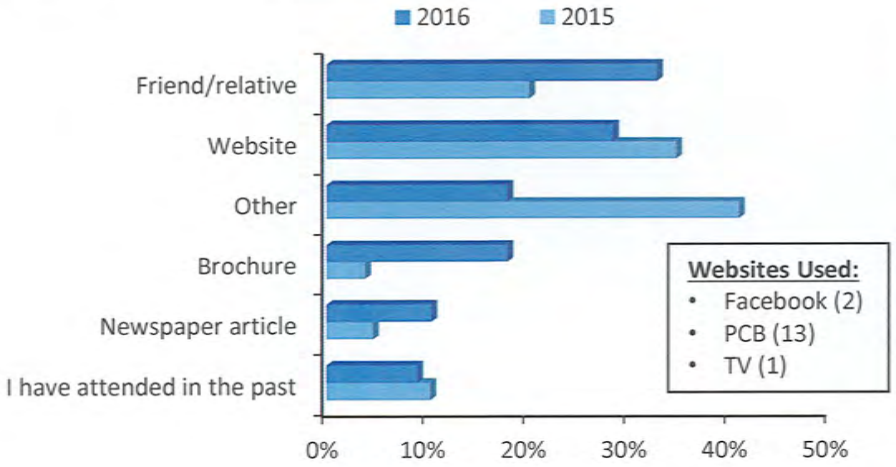
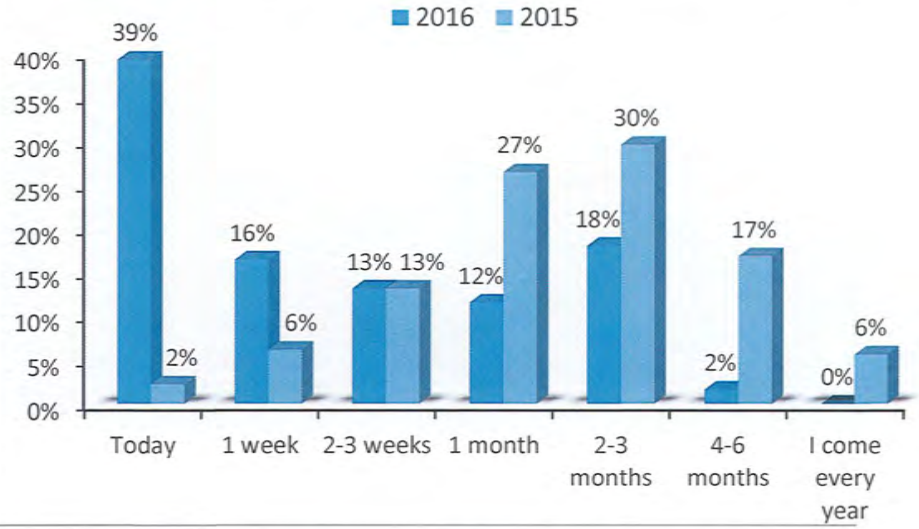
Trip Planning and Purpose

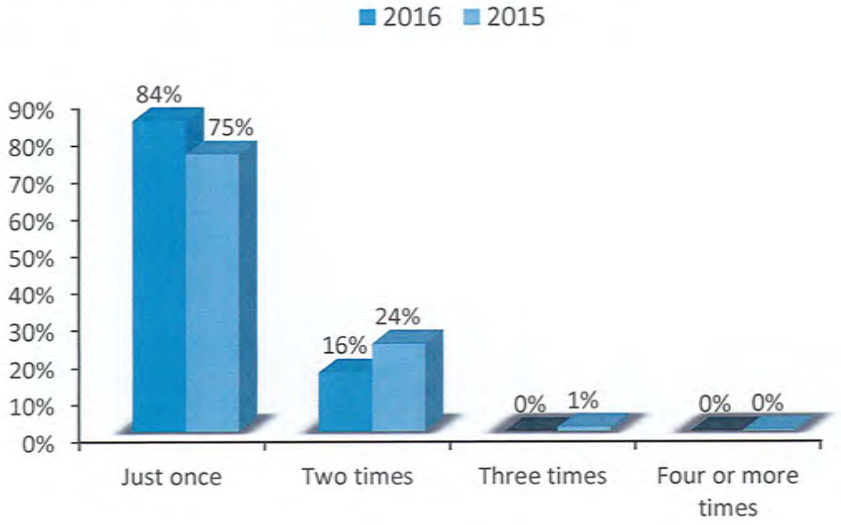
How did you find out about the festival? n=67



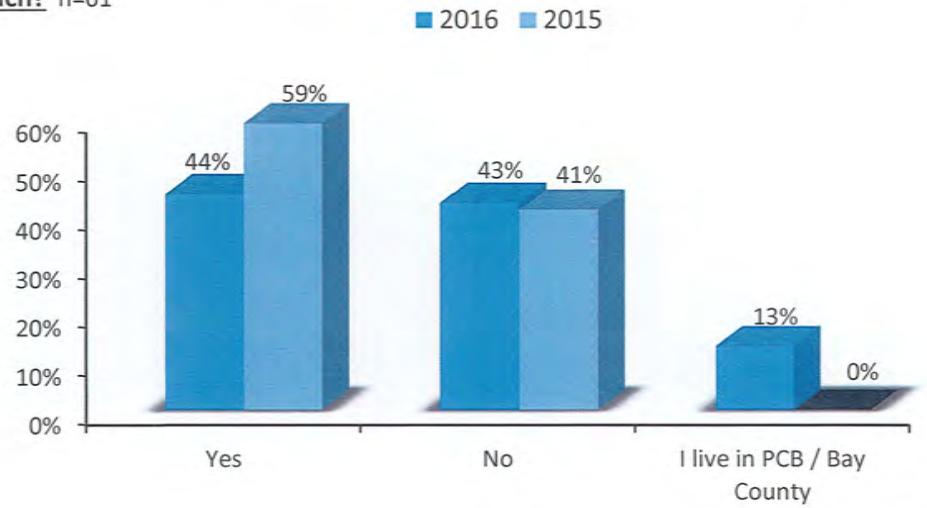
How far in advance did you plan to attend this festival/event? n=61



Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=56



Was attending this festival your primary purpose for visiting Panama City Beach? n=61



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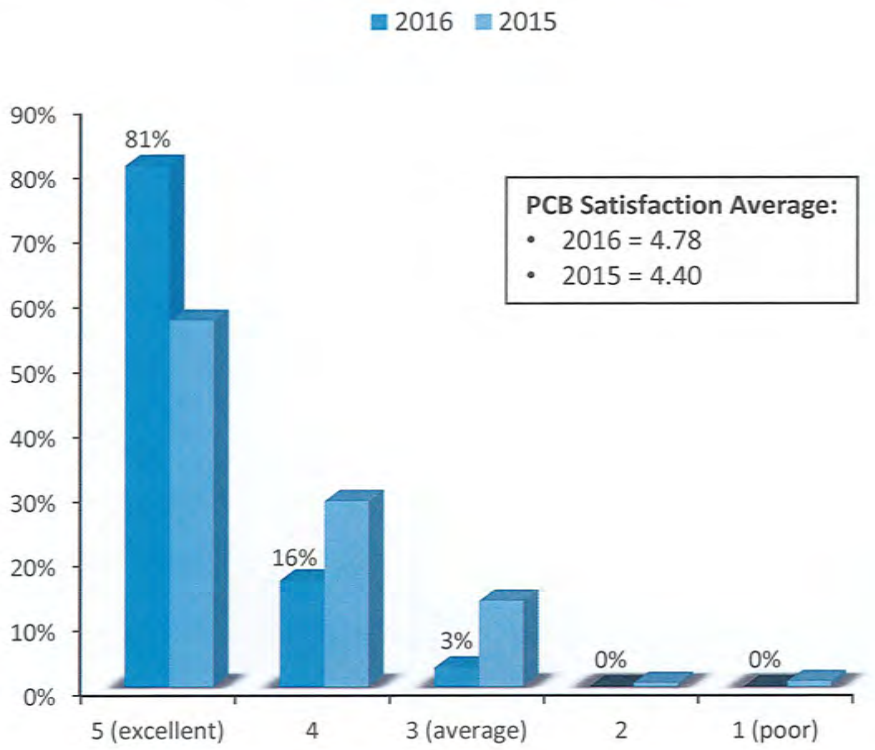
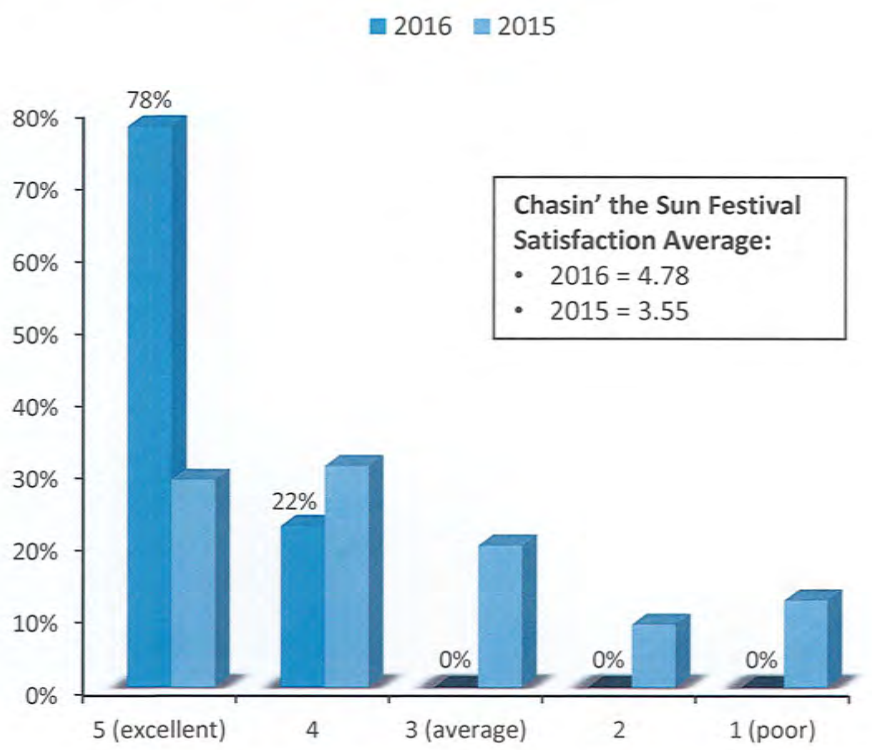
Panama City Beach Convention and Visitors Bureau
Chasin' the Sun

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=67



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Chasin' the Sun Festival? n=67



Observations:
- Overall trip satisfaction to Panama City Beach went up significantly from 2015 to 2016.
- Chasin' the Sun overall satisfaction was up in 2016 to 4.78 with the most significant changes by those respondents that rated the festival as excellent which was up from 29% in 2015 to 78% in 2016.

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Verbatim Comments:

How can we improve this festival?

- Hoping for loud rock music.
- Love that it is free!
- More acts
- More walkable areas in PCB
- No food/water.... different from summer concert
- Oldies
- PCB expensive - wish things were cheaper
- Rock, classic rock
- Softer chairs

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- Blue Mountain
- Enterprise
- Grayton Beach, Fl
- Niceville, FL (2)
- PCB (2)
- Vernon
- Wewahitchka, fl

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Dothan Al
- Freeport, Fl
- Miramar Beach, Fl
- Panama City
- PCB (3)
- Vernon

How did you find out about the festival?

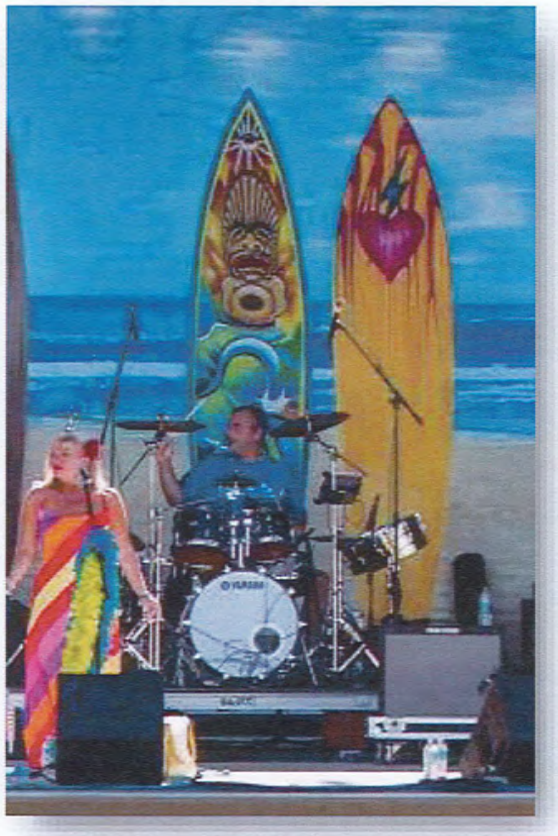
Other:

- At Longhorn, heard music
- Concerts in the park
- Driving by and saw set up
- Friend in the band
- Heard music and walked over
- Poster/banner (2)
- Shopping and heard music
- Thursday night concerts
- TV (2)
- Word of mouth. Shopping at Pier Park

Travel PARTY Spending (Total Trip)

Spending Category	2016	2015
Lodging	$836.13	$530.38
(% of reporting)	(44.1%)	(41.1%)
Dining/Food	$220.11	$230.55
(% of reporting)	(77.9%)	(70.4%)
Shopping	$138.47	$225.25
(% of reporting)	(44.1%)	(41.1%)
Bars/Nightclubs	$270.71	$121.81
(% of reporting)	(10.3%)	(30.6%)
Local Transportation	$48.75	$72.57
(% of reporting)	(11.8%)	(45.8%)
Tickets/Admissions	$57.00	$103.71
(% of reporting)	(2.9%)	(77.0%)
Average Total Spending Per Travel Party	**$745.51***	**$786.42***
(% of reporting)	(80.9%)	(80.1%)
Average total # in Travel Party	***2.7***	***2.7***
Average Length of Stay	***3.8 nights***	***4.8 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.



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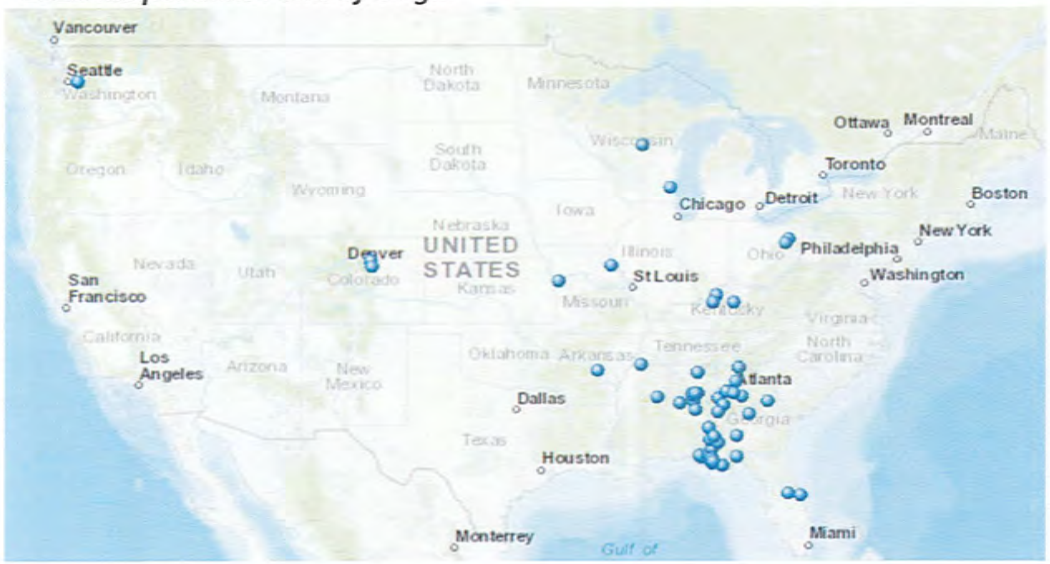
Panama City Beach Convention and Visitors Bureau

Chasin' the Sun

2016 Respondent Point of Origin



2015 Respondent Point of Origin

2016 Respondent Point of Origin

State - City		State - City	
FLORIDA- 37.3%		Clayton	1
Panama City Bch	12	Lagrange	1
Niceville	2	Morganton	1
Panama City	2	Villa Rica	1
Bonifay	1	Warner Robins	1
Freeport	1	**KENTUCKY- 4.5%**	
Grayton Beach	1	Lexington	1
Merritt Island	1	Pewee Valley	1
Miramar Beach	1	Shepherdsville	1
Ponce De Leon	1	**COLORADO- 3.0%**	
Tallahassee	1	Broomfield	1
Vernon	1	Denver	1
Wewahitchka	1	**MISSOURI- 3.0%**	
ALABAMA- 26.9%		Hannibal	1
Birmingham	5	Kansas City	1
Troy	2	**OHIO- 3.0%**	
Alabaster	1	Navarre	1
Clanton	1	North Canton	1
Dothan	1	**WISCONSIN- 3.0%**	
Enterprise	1	Menomonee	1
Fultondale	1	Wausau	1
Huntsville	1	**ARKANSAS- 1.5%**	
Opelika	1	Little Rock	1
Ozark	1	**MISSISSIPPI- 1.4%**	
Trussville	1	Starkville	1
Tuscaloosa	1	**SOUTH DAKOTA- 1.5%**	
Woodland	1	Brandon	1
GEORGIA- 11.9%		**TENNESSEE- 1.5%**	
Albany	1	Memphis	1
Atlanta	1	**WASHINGTON- 1.5%**	
Canton	1	Snoqualmie	1

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Pirates of the High Seas Festival

October 7-8, 2016
N=124

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews October 7th-8th at a random series of locations throughout Pier Park.

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Panama City Beach Convention and Visitors Bureau
Pirates of the High Seas

Summary of Festival Survey Responses

Pirates of the High Seas Festival Reponse Summary

- Respondents were an average age of **47** with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Generation Y (18-28) – 12%**
  - **Generation X (29-49) – 48%**
  - Baby Boomer (50-67) – 32%
  - Silent Generation (68-86) – 8%
- 65% of respondents were female, and 35% were male.
- 46% of respondents had a college degree or higher, while an additional 23% had attended some college.
- 55% of respondents reported an adult only travel party, while 45% were families traveling with children.
- Point-of-origin – Respondents came from **19 states** with the largest portion of respondents from **Florida (28%)**, followed by Georgia and then Alabama.
- Pre-trip planning – **58%** planned to attend festival on day of event, while **24%** come every year.
- Average length of stay in PCB **= 3.9 nights** - with **61%** reporting a lodging expenditure.
- Average party size attending the festival was 3.3 , up from 1.9 in 2015, with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.81 on a 5-point scale, up from 4.75 in 2015 and 4.65 in 2014.
- Overall rating of Pirates Festival was 4.65, slightly less than the 2015 ratings of 4.82.
- Average party spending while in PCB: $965.86, more than twice the 2015 total spend of $452.56

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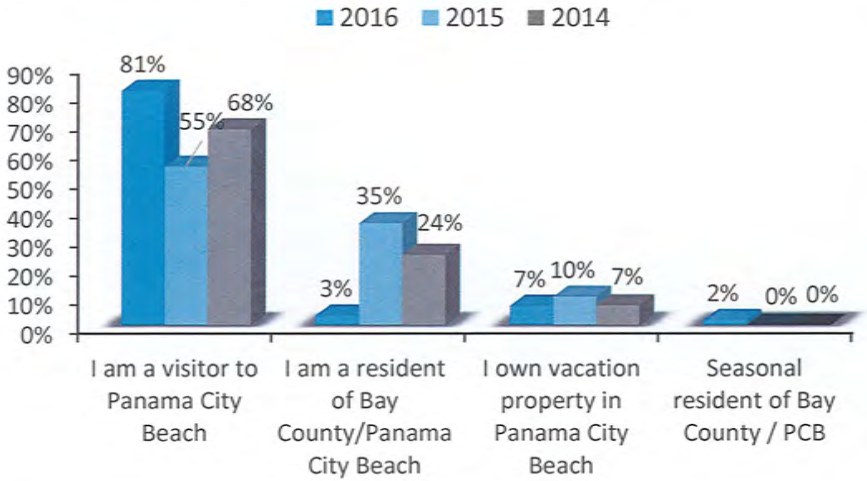
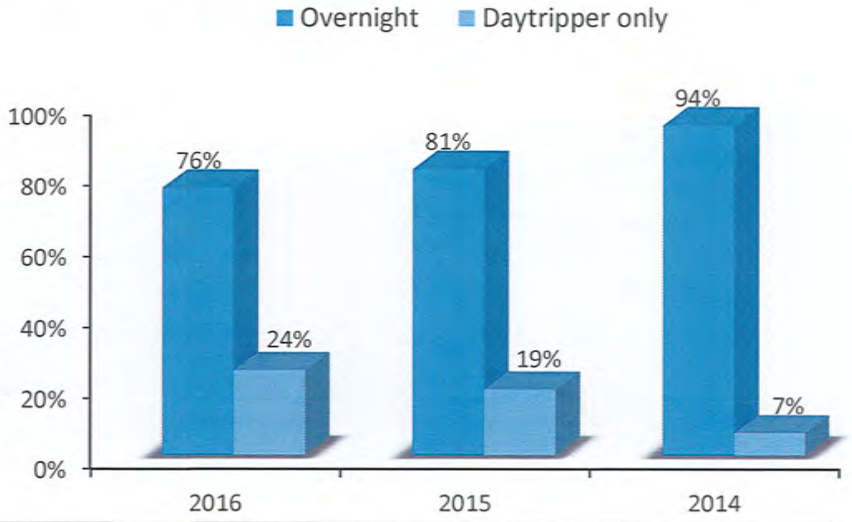
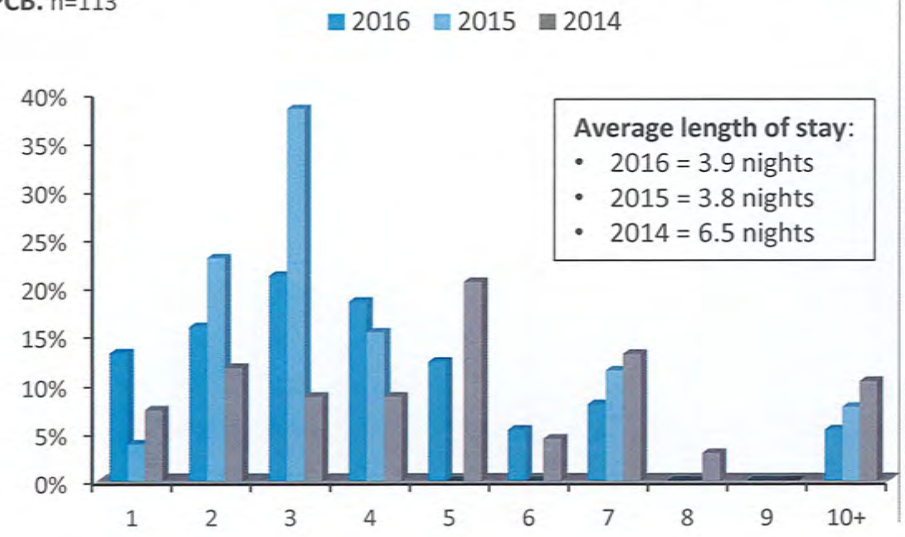
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=121



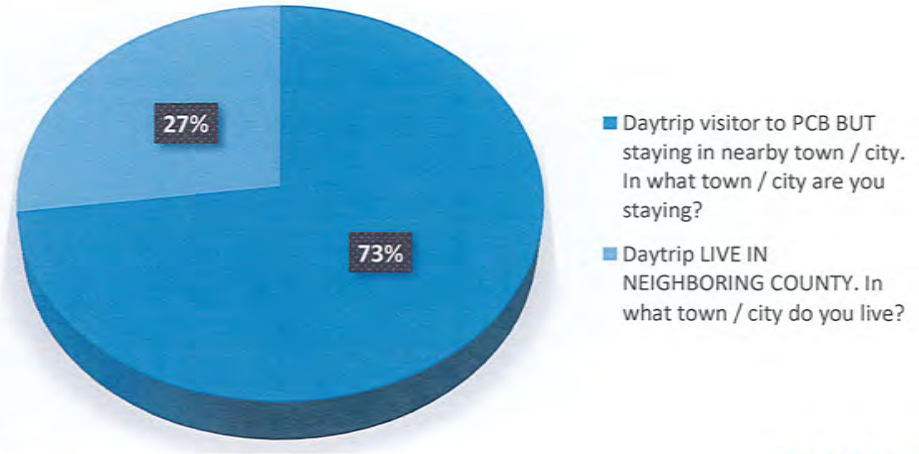
Are you staying in PCB overnight? n=107



Please specify the number of nights you are staying during this visit to PCB. n=113



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=31



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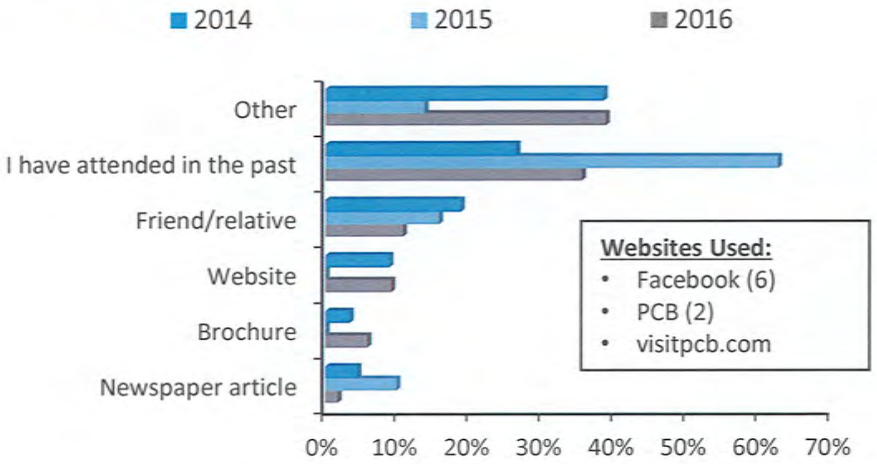
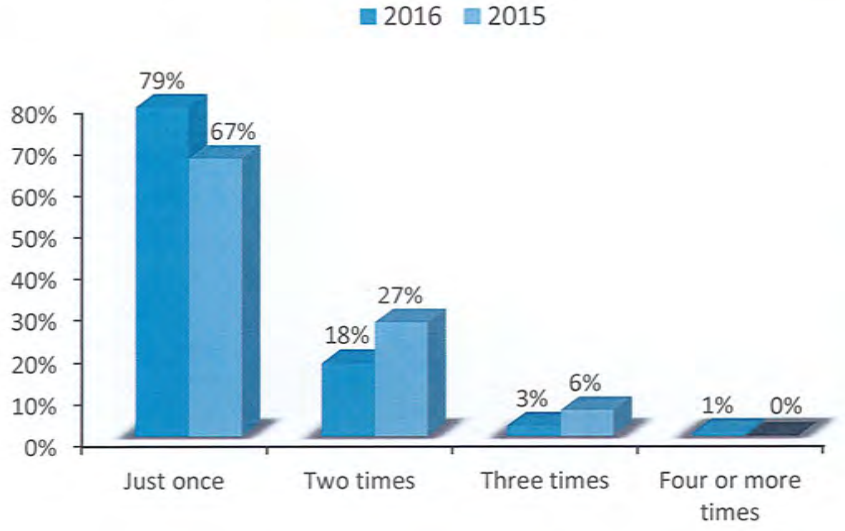
Trip Planning and Purpose

How did you find out about the festival? n=121

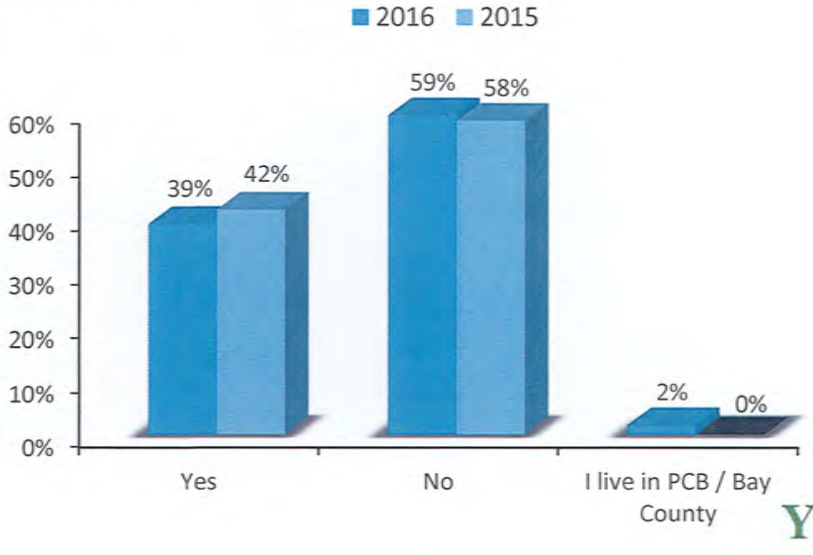


How far in advance did you plan to attend this festival/event? n=116

Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=119



Was attending this festival your primary purpose for visiting Panama City Beach? n=118



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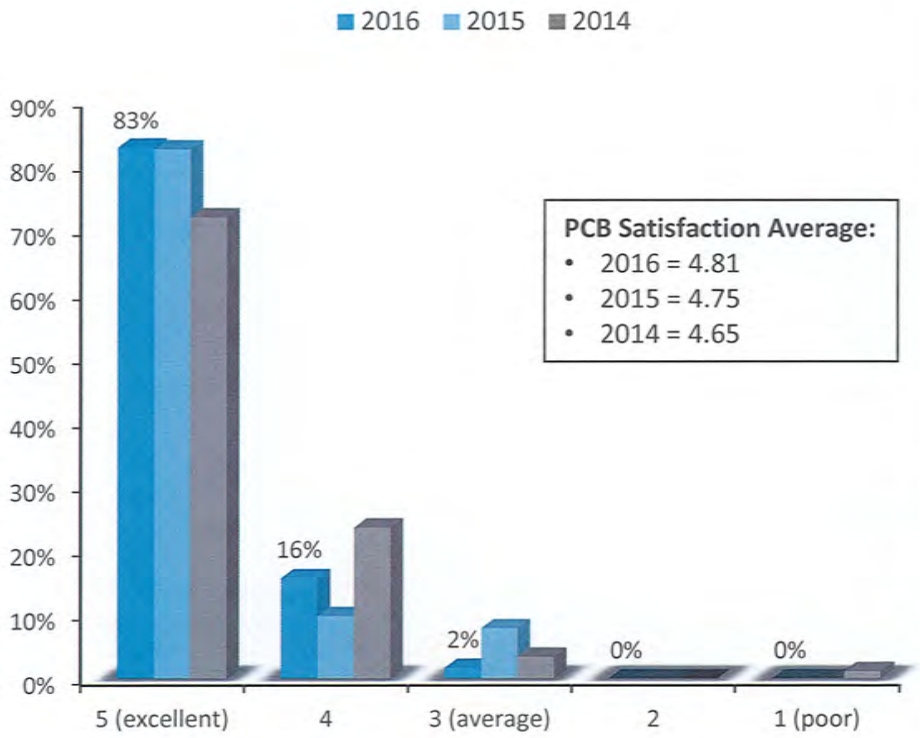
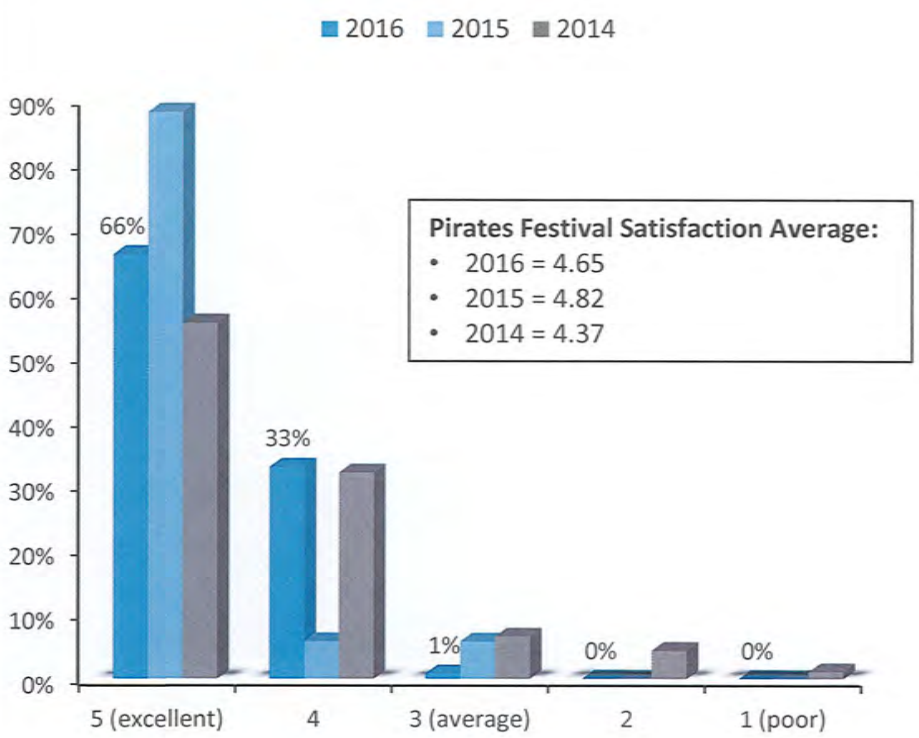
Panama City Beach Convention and Visitors Bureau
Pirates of the High Seas

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=121



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Pirates of the High Seas Festival? n=121



Observations:
- Overall trip satisfaction to Panama City Beach has risen the past 3 years from 4.65 in 2014 to 4.81 in 2016.
- Pirates Festival overall satisfaction was down in 2016 to 4.65 from 2015 rating of 4.82.

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Panama City Beach Convention and Visitors Bureau
Pirates of the High Seas

Travel PARTY Spending (Total Trip)

Spending Category	2016	2015
Lodging	$612.44	$691.56
(% of reporting)	(60.5%)	(30.8%)
Dining/Food	$335.58	$133.14
(% of reporting)	(91.1%)	(82.7%)
Shopping	$278.86	$81.96
(% of reporting)	(57.3%)	(53.8%)
Bars/Nightclubs	$227.20	$130.00
(% of reporting)	(20.2%)	(7.7%)
Local Transportation	$118.78	$60.71
(% of reporting)	(66.9%)	(80.8%)
Tickets/Admissions	$113.00	$50.00
(% of reporting)	(4.8%)	(9.6%)
Average Total Spending Per Travel Party	**$965.86***	**$452.56***
(% of reporting)	(92.7%)	(78.8%)
Average total # in Travel Party	***3.3***	***1.9***
Average Length of Stay	***3.6 nights***	***3.8 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

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Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

1. **Loved it!**
2. **Less traffic/crowds in PCB**
3. **More Advertising/ Information Available**

- First time. Love it will be back
- Great to have barriers. Appreciate the safety
- Hot
- It is too busy in PC
- Less traffic
- Love the invasion
- Loved pirates and music
- More nightlife
- More pirates, selling stilts
- More schedule posted
- Needs more local advertising - Destin, Niceville, etc..
- Parade route - didn't feel like they knew what was going on
- Side walks-need them

How did you find out about the festival?

Other:

- Facebook
- Grandson is excited
- Happened on it (2)
- Hotel
- Hotel - Wyndham
- Hurricane Evacuation (3)
- N/A
- Pier Park (14)
- Shopping (17)
- Walking around (3)
- Word of mouth

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- ALYS Beach
- Blountstown
- Bonifay (2)
- Callaway
- Crestview
- DeFuniak Springs
- Edgefield, SC
- Enterprise (2)
- Lynn Haven (5)
- Marianna
- Mexico Beach (4)
- Navarre FL
- Niceville
- Panama City (2)
- Rosmary Beach
- Tallahassee
- Tide Water Condo

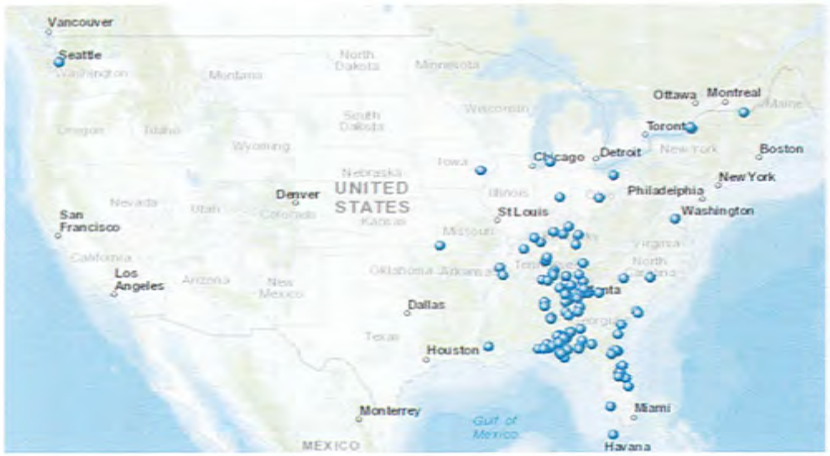
Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Bay County
- Dathan
- Ft. Walton
- Hurrican Evacuation
- Lynn Haven (3)
- Panama City (2)
- Port St. Joe

Panama City Beach Convention and Visitors Bureau

Pirates of the High Seas

2016 Respondent Point of Origin



2015 Respondent Point of Origin

State - City							
FLORIDA- 28.3%		Dawnsonville	1	Lanett	1	Brownville	1
Lynn Haven	4	Duluth	1	Meridianville	1	Dexter	1
Bonifay	3	Elberton	1	Montgomery	1	**OHIO- 1.7%**	
Deltona	2	Fortson	1	Pansey	1	Blacklick	1
Jacksonville	2	Gainsville	1	Shorterville	1	Cleveland	1
Ormond Beach	2	Griffin	1	**TENNESSEE- 10.8%**		**ARKANSAS- 0.8%**	
Panama City	2	Jacksonville	1	Nashville	4	Osceola	1
Tallahassee	2	Jefferson	1	Hixson	2	**CALIFORNIA- 0.8%**	
Blounstown	1	LaFayette	1	Coker Creek	1	Hoschton	1
Cocoa	1	Leesburg	1	Hendersonville	1	**IOWA- 0.8%**	
Crestview	1	Mariette	1	Knoxville	1	Iowa City	1
DeBary	1	Nelson	1	Manchester	1	**INDIANA- 0.8%**	
Defuniak Springs	1	Ochlocknee	1	Memphis	1	Anderson	1
Fountain	1	Resaca	1	Tullahoma	1	**LOUISIANA- 0.8%**	
Ft Meyers	1	Rome	1	Winchester	1	Denham Springs	1
Keywest	1	Savannah	1	**KENTUCKY- 6.7%**		**MICHIGAN- 0.8%**	
Mexico Beach	1	Thomaston	1	Bagdad	1	Benton Harbor	1
Navarre	1	Valdosta	1	Bardstown	1	**MISSOURI- 0.8%**	
Niceville	1	Villa Rica	1	Benton	1	Joplin	1
Orlando	1	**ALABAMA- 15.0%**		Brandenburg	1	**N. CAROLINA- 0.8%**	
Palm Bay	1	Dothan	2	Central City	1	Fayetteville	1
Pensacola	1	Newton	2	Richmond	1	**VIRGINIA- 0.8%**	
Port St. Joe	1	Alabaster	1	Sebree	1	Springfield	1
Sanford	1	Ashford	1	Somerset	1	**VERMONT- 0.8%**	
St Augustine	1	Birmingham	1	**S. CAROLINA- 4.2%**		Newport	1
GEORIGA- 20.8%		Elkmont	1	Edgefield	2	**WASHINGTON- 0.8%**	
Cedartown	2	Elmore	1	Charleston	1	Seattle	1
Atlanta	1	Enterprise	1	Charleston	1		
Blairsville	1	Fort Payne	1	Fort Mill	1	**INTERNATIONAL**	
Bowden	1	Fort Rucker	1	**NEW YORK- 3.3%**		**MEXICO-100%**	
Darien	1	Honoraville	1	Chaumont	2	Sinaloa	1

Thunder Beach Fall Rally

October 19 – 23, 2016

N=44

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews October 21st – 25th at a random series of locations throughout Frank Brown Park.

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Panama City Beach Convention and Visitors Bureau
Thunder Beach Fall Rally

Summary of Festival Survey Responses

Thunder Beach Festival Reponse Summary

- Respondents were an average age of **53** with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Baby Boomer (54-71) – 55%**
  - **Generation X (33-53) – 33%**
  - Silent Generation (68-86) – 9%
  - Generation Y (18-28) – 3%
- 43% of respondents were female, and 57% were male.
- 33% of respondents had a college degree or higher, while an additional 11% had attended some college.
- 100% of respondents reported an adult only travel party.
- Point-of-origin – Respondents came from **14 states** with the largest portion of respondents from **Alabama (28%)**, followed by Georgia and then Florida.
- Pre-trip planning – **68%** come to the festival every year, followed by **13% planning 4-6 months prior to their visit**.
- Average length of stay in PCB was 4.7 nights. Length of stay was slightly lower than 2015 length of stay at 5.2 nights, but still higher than the 3.8 nights in 2014.
- Average party size attending the festival was 3.6, with 2 being the most frequent response.
- PCB visit satisfaction rated highly at 4.75, higher than the 2015 rating of 4.57.
- Overall rating of Thunder Beach Autumn Rally was 4.75, slightly lower than 2015's rating at 4.82 on a 5-point scale,.
- Average party spending while in PCB: $1,154.19, up $275 from 2015.

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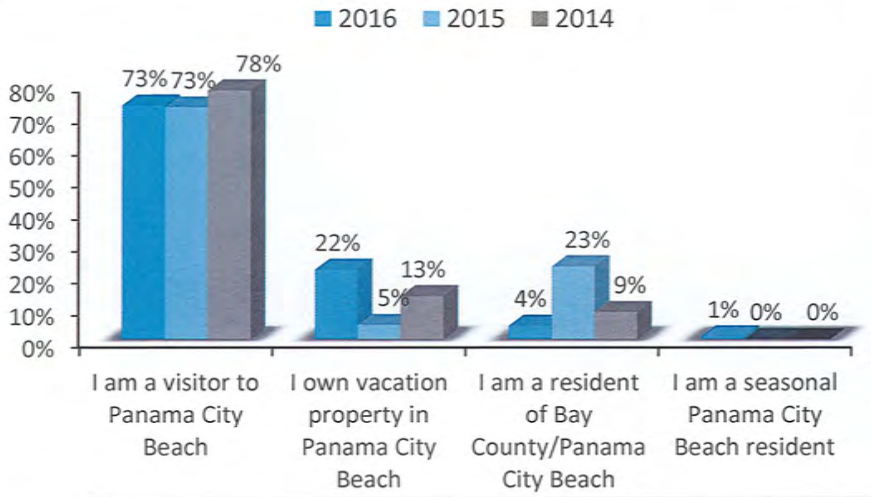
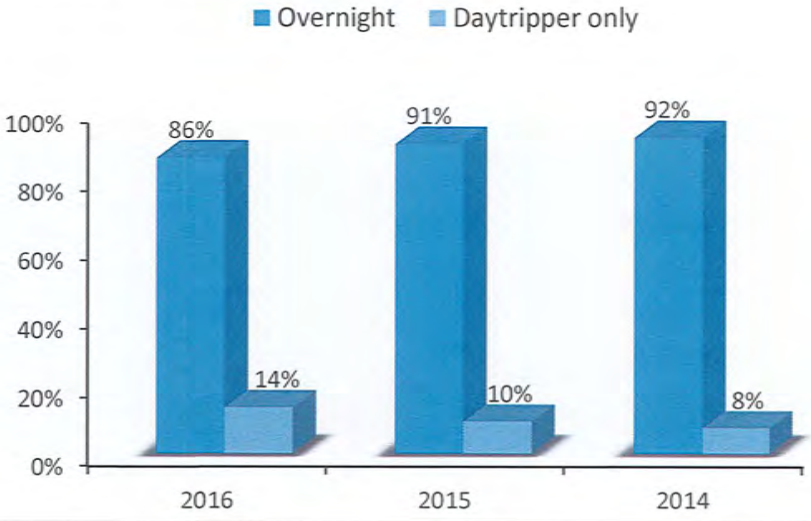
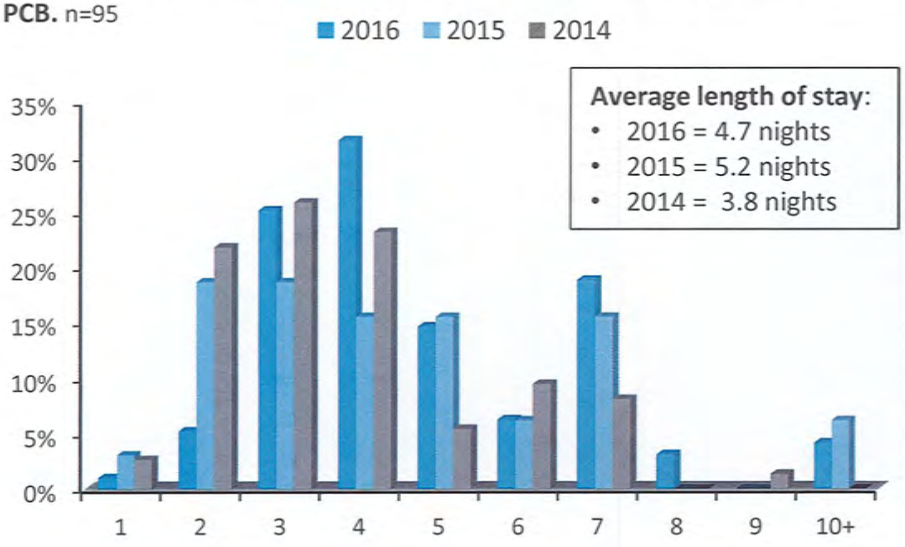
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=120



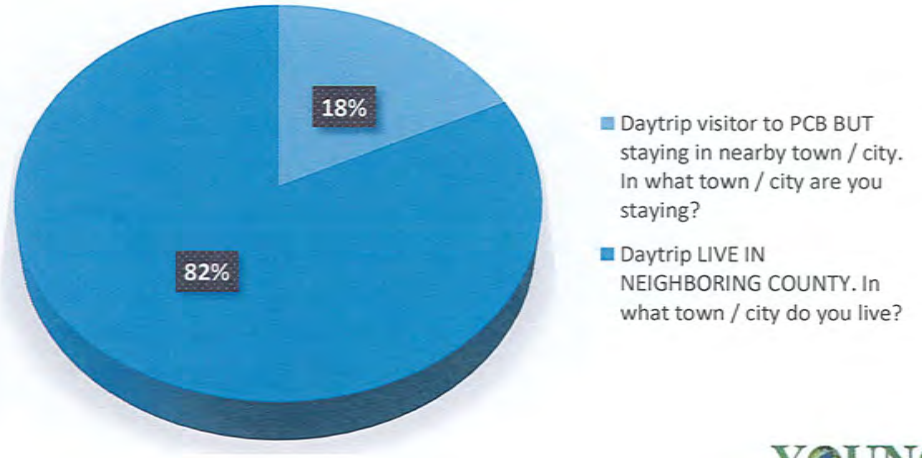
Are you staying in PCB overnight? n=88



Please specify the number of nights you are staying during this visit to PCB. n=95



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=17



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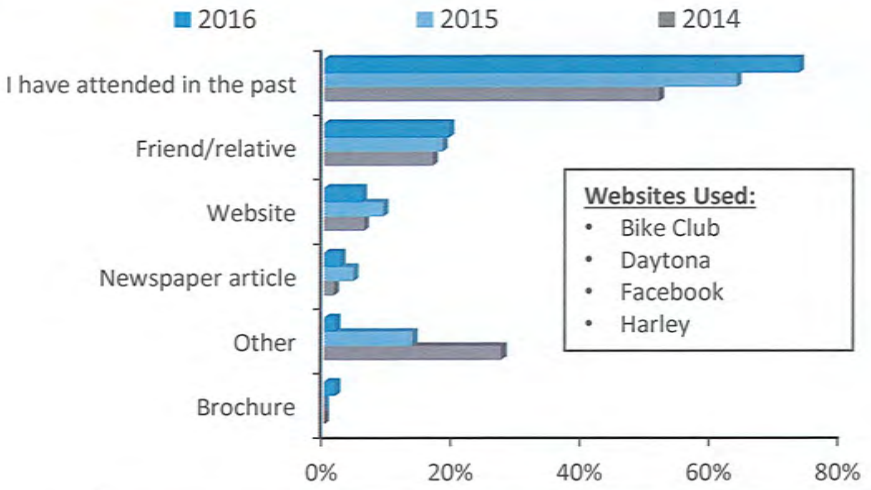
Panama City Beach Convention and Visitors Bureau
Thunder Beach Fall Rally

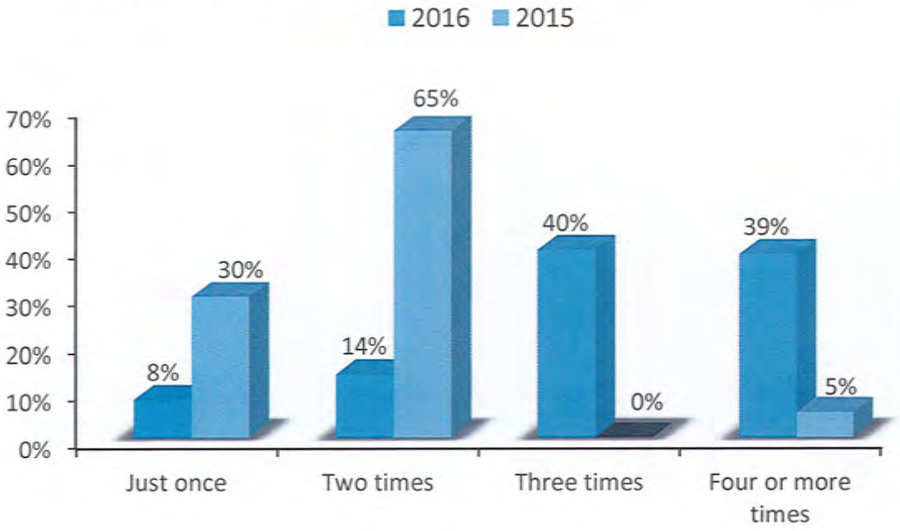
Trip Planning and Purpose

How did you find out about the festival? n=120

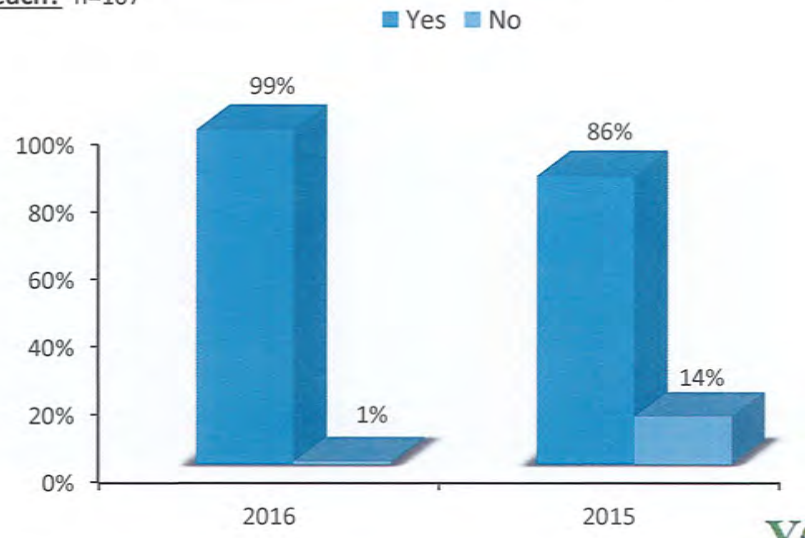


How far in advance did you plan to attend this festival/event? n=116

Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=111



Was attending this festival your primary purpose for visiting Panama City Beach? n=107



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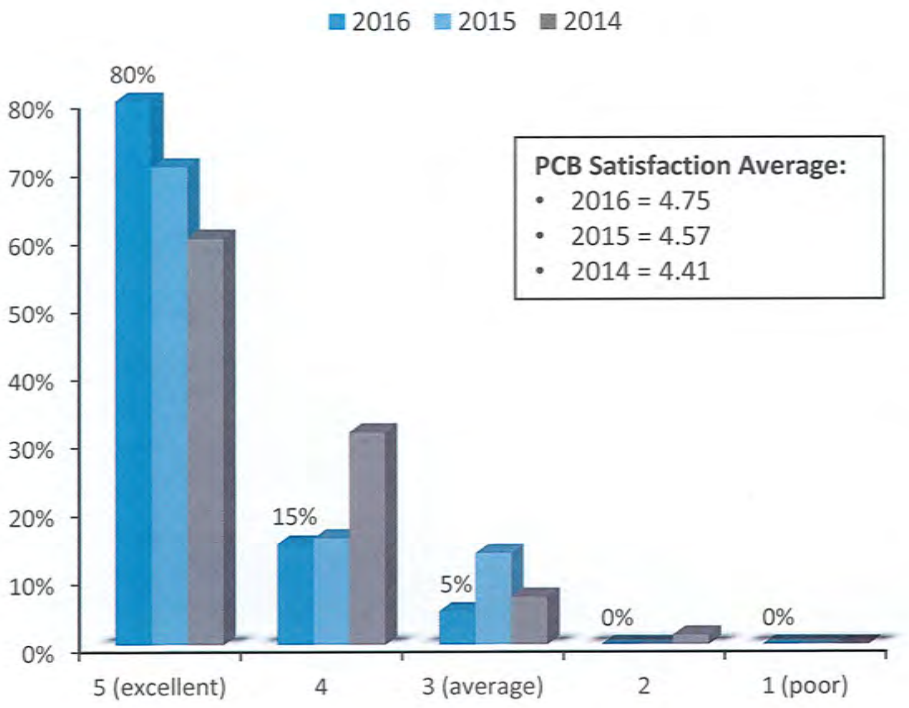
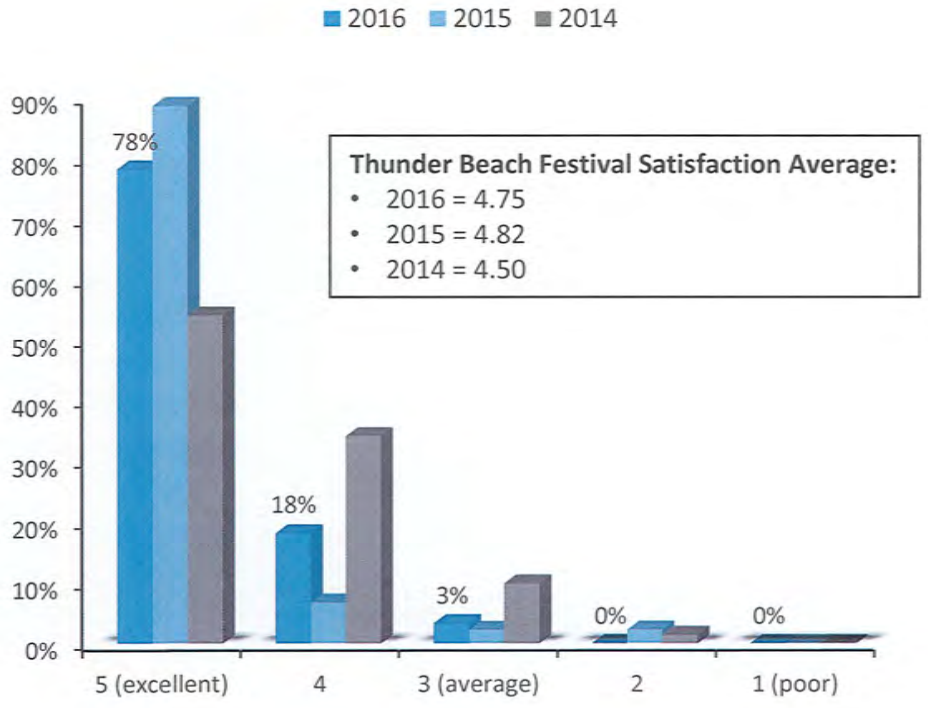
Panama City Beach Convention and Visitors Bureau
Thunder Beach Fall Rally

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=120



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Thunder Beach Fall Rally? n=120



Observations:
- Overall trip satisfaction to Panama City Beach is at its highest rating in 3 years at 4.75 on a 5-point scale.
- Thunder Beach Fall Rally rating was 4.75 in 2016, slightly lower than the 2015 rating of 4.82.

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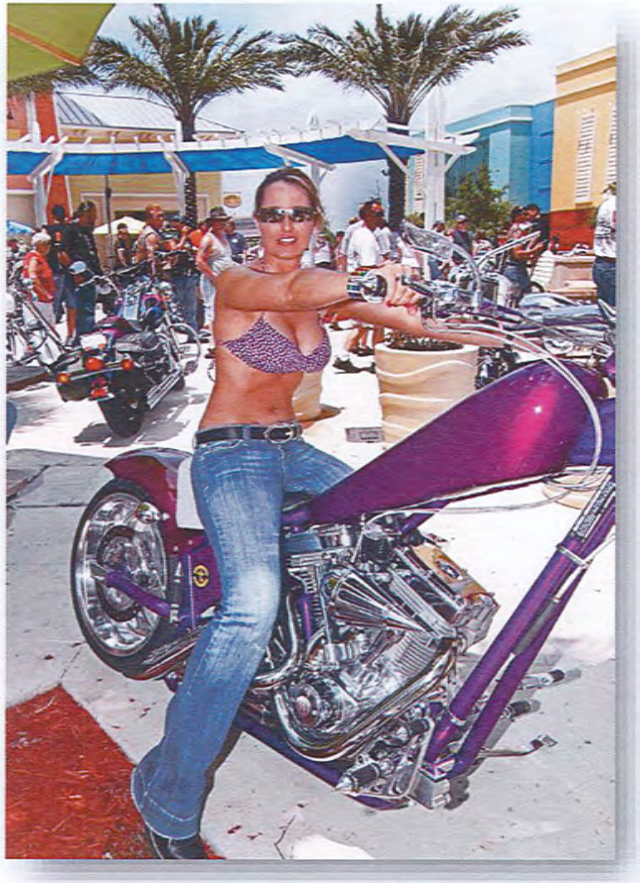
Panama City Beach Convention and Visitors Bureau
Thunder Beach Fall Rally

Travel PARTY Spending (Total Trip)

Spending Category	2016	2015
Lodging	$530.40	$670.00
(% of reporting)	(61.7%)	(59.1%)
Dining/Food	$363.96	$147.57
(% of reporting)	(92.5%)	(84.1%)
Shopping	$238.03	$156.84
(% of reporting)	(82.5%)	(43.2%)
Bars/Nightclubs	$298.20	$124.64
(% of reporting)	(53.3%)	(31.8%)
Local Transportation	$42.20	$84.86
(% of reporting)	(58.3%)	(81.8%)
Tickets/Admissions	$100.00	$100.00
(% of reporting)	(0.8%)	(2.3%)
Average Total Spending Per Travel Party	**$1,154.19***	**$879.21***
(% of reporting)	(95.8%)	(86.4%)
Average total # in Travel Party	***3.6***	***2.4***
Average Length of Stay	***4.7 nights***	***5.2 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.



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Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

1. **More vendors**
2. **Centralizing events**
3. **Traffic control**

- All traffic one area-more spread out
- Better then Daytona (2)
- Better then Daytona. More vendors (quality) more spread out
- Bikers only parking - doing good job with parking
- Centralizing events
- Food too high
- Free beer
- Golfcarts
- Handicap parking. Car turned away. Drove trailer with bikes
- More central locations
- More honda vendors other then harley
- More vendor spread
- More vendors (3)
- More vendors - too spread out
- Swap meet -
- Traffic control
- Uber-needed

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- 1.5 Hours Away
- Here on job - Construction
- Mexico Beach

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- 30 miles away
- Chipley
- Dothan Al
- Fountain, Fl
- Freeport, FL
- Milton Fl
- Monticello, Fl
- Niceville, FL
- Panama City (3)
- Pensacola, Fl
- Port Orange, Fl
- Santa Rosa Beach, Fl

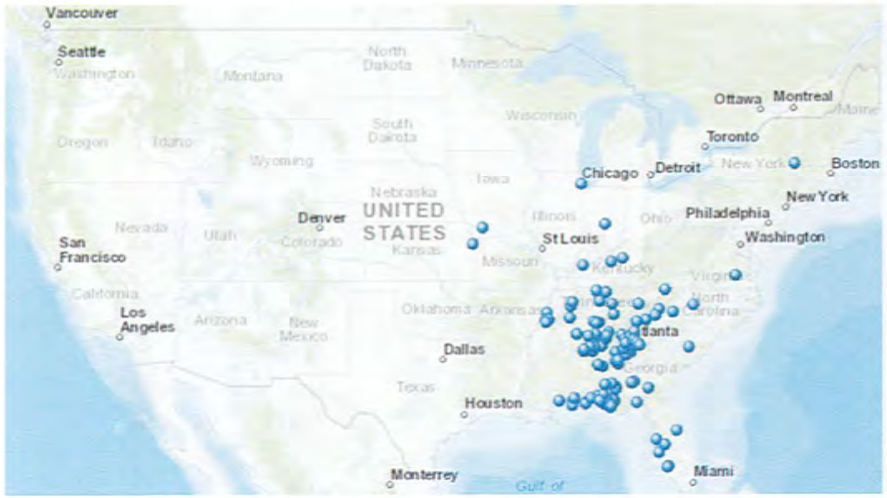
How did you find out about the festival?

Other:

- Drove by and stopped
- Radio

Panama City Beach Convention and Visitors Bureau
Thunder Beach Fall Rally

2016 Respondent Point of Origin



2015 Respondent Point of Origin

State - City							
ALABAMA- 27.5%		Atlanta	2	New Smyrna Bch	1	Lexington	1
Dothan	4	Covington	2	Niceville	1	Shelby	1
Gadsden	2	Douglasville	2	North Fort Meyer	1	Skyland	1
Huntsville	2	Blairsville	1	Orange Park	1	**KENTUCKY- 2.5%**	
Prattville	2	Clayton	1	Plant City	1	Frankfort	1
Tuscaloosa	2	Conyers	1	Ponce De Leon	1	Henderson	1
Arley	1	Cumming	1	Port Orange	1	Shepherdsville	1
Athens	1	Fayetteville	1	Port Richey	1	**ILLINOIS- 0.8%**	
Bessemer	1	Greenville	1	Sanford	1	Chicago	1
Birmingham	1	Hiram	1	Santa Rosa Bch	1	**INDIANA- 0.8%**	
Collinsville	1	Nashville	1	**TENNESSEE- 10.8%**		Indianapolis	1
Cullman	1	Powder Springs	1	Maryville	2	**KANSAS- 0.8%**	
Dauphin Island	1	Rex	1	Bristol	1	Olathe	1
Elba	1	Roswell	1	Campaign	1	**MISSOURI- 0.8%**	
Hamilton	1	Stockbridge	1	Dixon Springs	1	Cameron	1
Helena	1	Stone Mountain	1	Lexington	1	**NEW YORK- 0.8%**	
Mc Calla	1	Taylorsville	1	Michie	1	Johnsonville	1
Mobile	1	Tucker	1	Millington	1	**S CAROLINA- 0.8%**	
Montgomery	1	Williamson	1	Mount Juliet	1	Santee	1
Opelika	1	**FLORIDA- 21.7%**		Murfreesboro	1	**VIRGINIA- 0.8%**	
Ozark	1	Panama City	5	Westport	1	Colonial Heights	1
Pell City	1	Pensacola	2	White House	1		
Roanoke	1	Cape Coral	1	Whitwell	1		
Salem	1	Chipley	1	**MISSISSIPPI- 4.2%**			
Theodore	1	Crestview	1	Gulfport	1		
Valley	1	Defuniak Springs	1	Hernando	1		
Warrior	1	Ellenton	1	Nesbit	1		
GEORGIA- 24.2%		Fountain	1	Olive Branch	1		
Newman	3	Freeport	1	Southhaven	1		
Albany	2	Milton	1	**N CAROLINA- 3.3%**			
Alpharetta	2	Monticello	1	Brevard	1		

YOUNG strategies, inc.

Emerald Coast Cruzin' Car Show

November 7 - 12, 2016

N=120

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews November 7th-12th at a random series of locations throughout Aaron Bessant Park.

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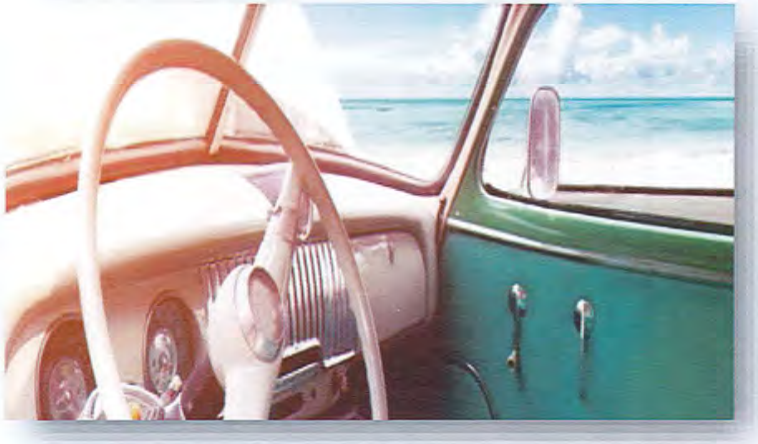
Panama City Beach Convention and Visitors Bureau

Emerald Coast Cruzin'

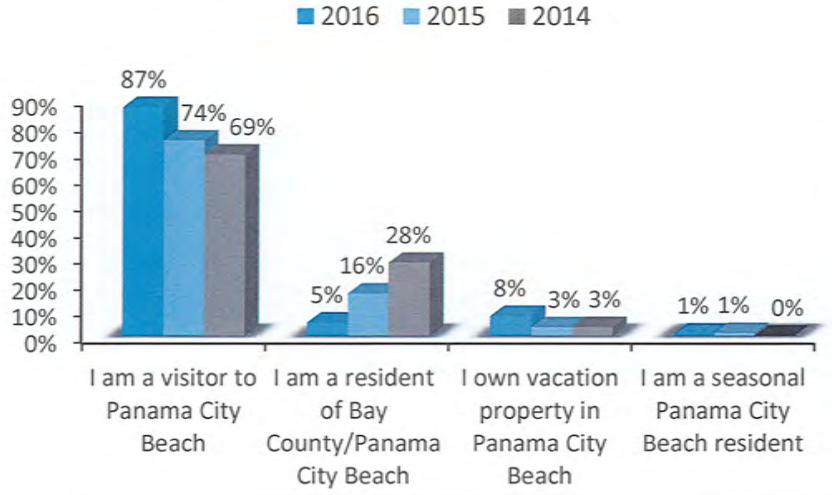
Summary of Festival Survey Responses



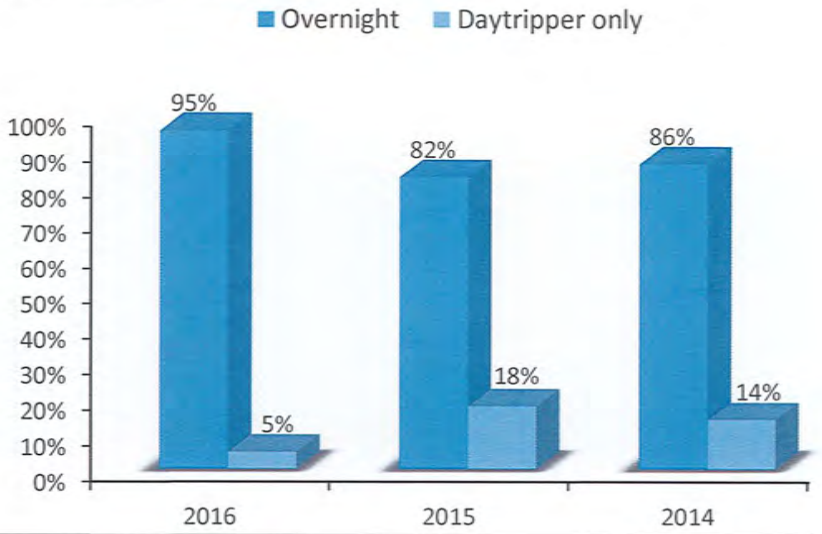
Emerald Coast Cruzin' Festival Reponse Summary

- Respondents were an average age of 62 with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Baby Boomer (50-67) – 59%**
  - **Generation X (29-49) – 11%**
  - Generation Y (18-28) – 2%
  - Silent Generation (68-86) – 28%
- 31% of respondents were female, and 69% were male.
- 42% of respondents had a college degree or higher, while an additional 24% had attended some college.
- 99.2% of respondents reported an adult only travel party, while 0.8% were families traveling with children.
- Point-of-origin – Respondents came from **16 states** with the largest portion of respondents from **Alabama (35%)**, followed by Florida and then Mississippi.
- Pre-trip planning – **58%** come to the festival every year, followed by **18% planning 2-3 months prior to their visit**.
- Average length of stay in PCB = 4.5 nights, up from 2015 and 2014 length of stay at 4.1 and 3.9 nights respectively.
- Average party size attending the festival was 2.7 with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.80, up from the 2015 rating of 4.62 on a 5-point scale.
- Overall rating of Emerald Coast Cruzin' was 4.63 on a 5-point scale.
- Average party spending while in PCB: $1,006.66.

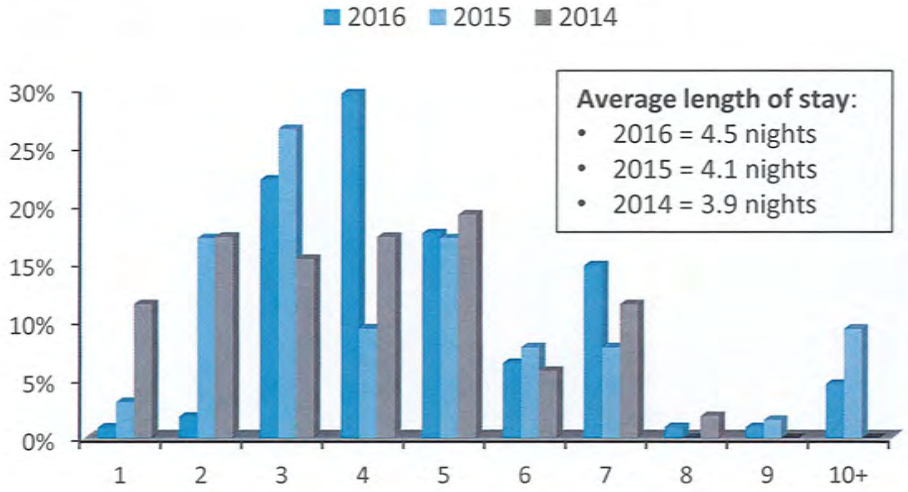
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=120



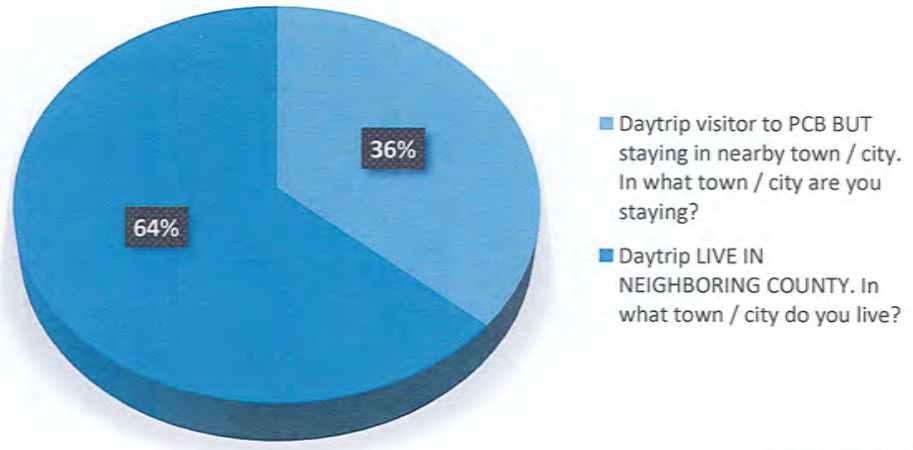
Are you staying in PCB overnight? n=104



Please specify the number of nights you are staying during this visit to PCB. n=108



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=11



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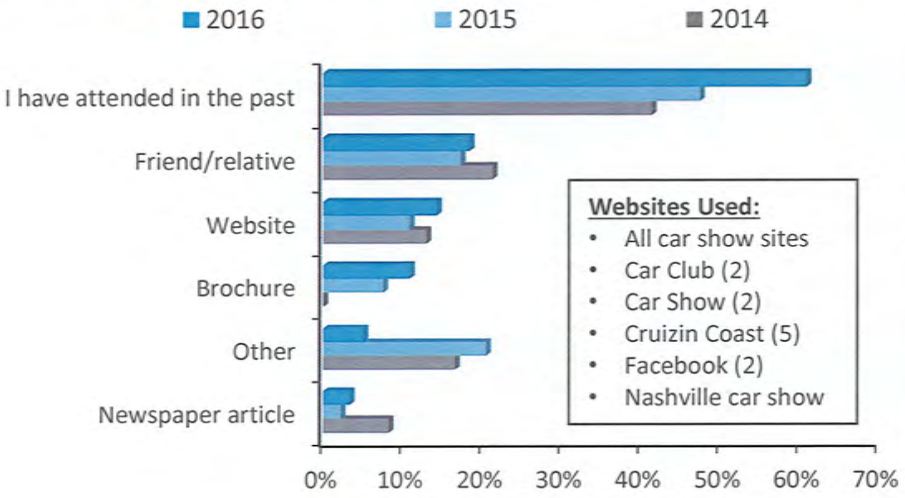
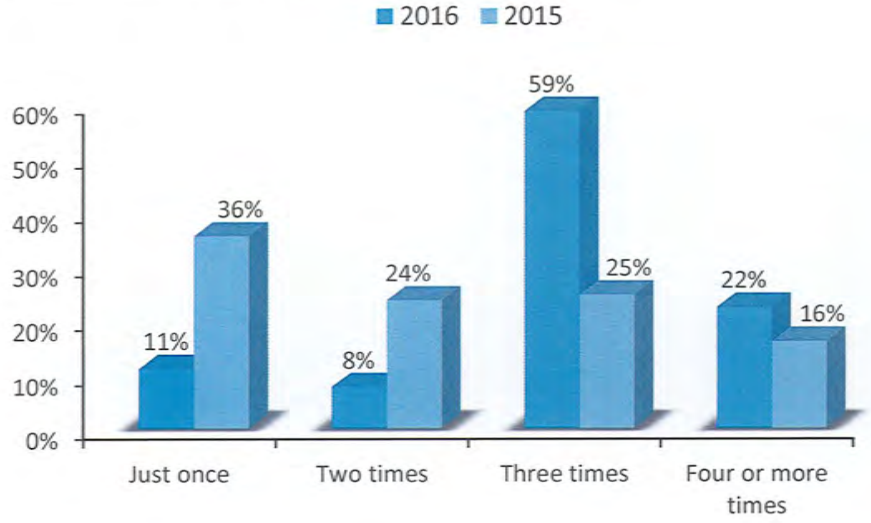
Trip Planning and Purpose

How did you find out about the festival? n=120

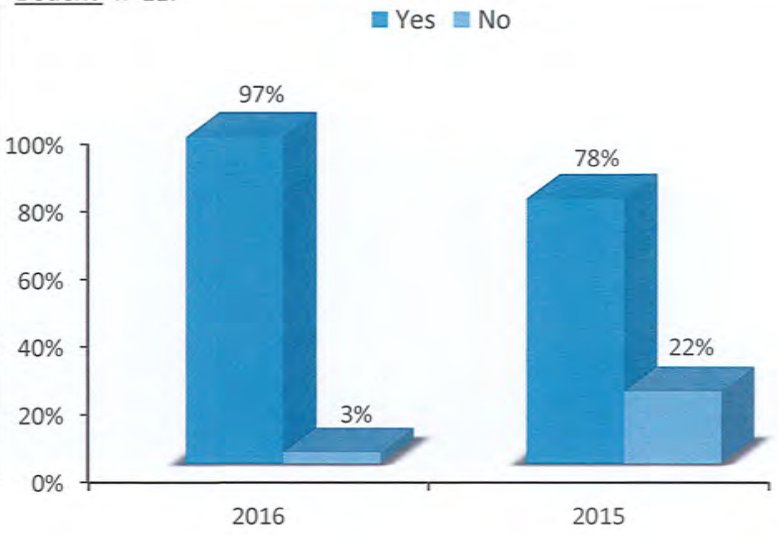


How far in advance did you plan to attend this festival/event? n=114

Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=116



Was attending this festival your primary purpose for visiting Panama City Beach? n=117



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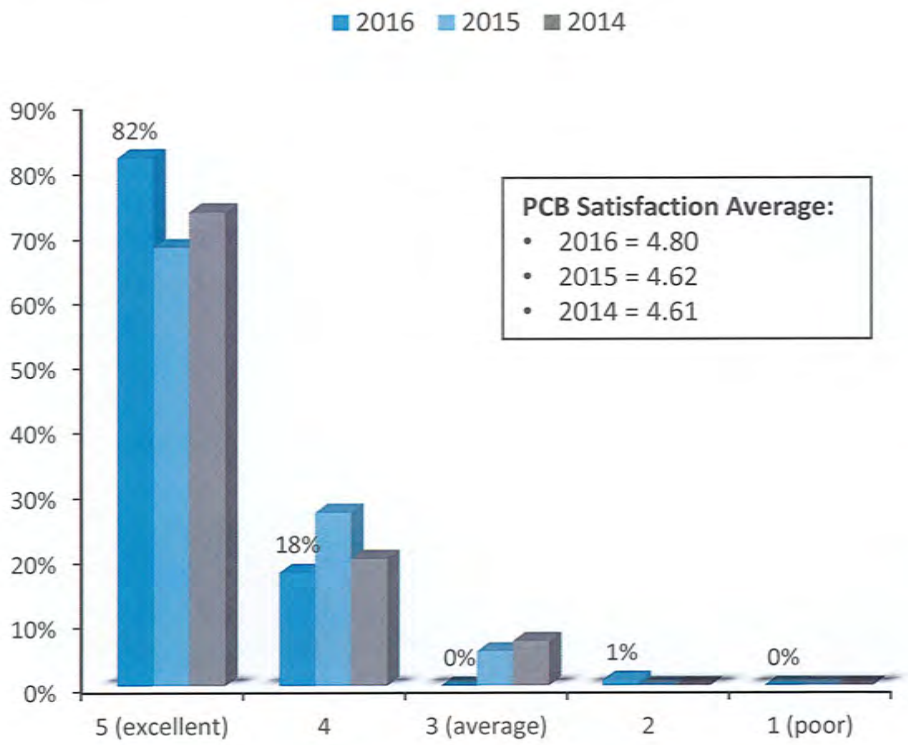
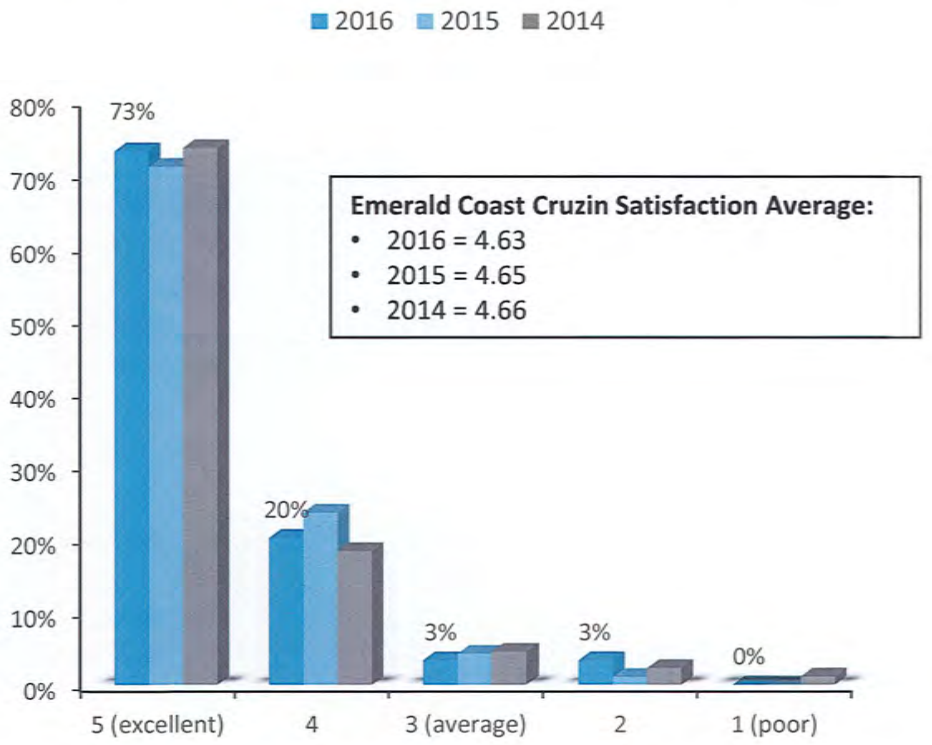
Panama City Beach Convention and Visitors Bureau
Emerald Coast Cruzin'

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=119



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Emerald Coast Cruzin' Festival? n=119



Observations:
- Overall trip satisfaction to Panama City Beach is at a 3-yr high rating at 4.80 on a 5-point scale.
- Emerald Coast Cruzin' Festival overall satisfaction was slightly down in 2016 with a rating of 4.63.

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Panama City Beach Convention and Visitors Bureau
Emerald Coast Cruzin'

Travel PARTY Spending (Total Trip)

Spending Category	2016	2015
Lodging	$509.44	$538.23
(% of reporting)	(65.8%)	(51.6%)
Dining/Food	$294.63	$263.62
(% of reporting)	(86.7%)	(73.1%)
Shopping	$221.20	$214.89
(% of reporting)	(76.7%)	(47.3%)
Bars/Nightclubs	$250.00	$143.33
(% of reporting)	(10.8%)	(12.9%)
Local Transportation	$62.51	$81.45
(% of reporting)	(63.3%)	(24.7%)
Tickets/Admissions	$0.00	$112.45
(% of reporting)	(0.0%)	(11.8%)
Average Total Spending Per Travel Party	**$1,006.66***	**$775.53***
(% of reporting)	(95.0%)	(73.1%)
Average total # in Travel Party	***2.7***	***2.5***
Average Length of Stay	***4.5 nights***	***4.1 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

1. **More parking**
2. **Easier entry / shuttle service**
3. **Open earlier**

- 7:00 open time - tents - make it fair - more vendors - more than one way in and out - women vendors
- Allow tents by car
- Admission is high
- Awards drag out too long
- Better traffic flow
- Burn out area - fix
- Can't use trailer up display
- Car parking
- Car parking - need better info
- Getting in and out of festival
- Great bands
- Loud speaker far back- too loud!
- More beer places - want veteran discount
- More cruisin
- More daily events at different places
- More garbage cans where cars are
- More info where things are to do
- More parking
- More parking spots - allow tents
- More trash cans
- Nicer people - upset. Car parking - no reserve. Had a run in with other car owners that made them mad
- Not as much swap meet
- Open up before 8 for cars
- Opening line- mess
- Parade needs to be better
- Parking needs to be organized - swap meet - needs to do better
- Paying to get in
- Restrooms - need better signs
- Seems small
- Shuttle bus
- Shuttle service
- Tents - be able to put up
- Tents -must have - be able to leave them up!
- Too crowded - not enough room for cars
- Traffic

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- Destin, FL
- Panama City (2)
- Valparaiso, FL

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Dothan Al
- Newton, Al
- Panama City (4)
- Santa Rosa Beach

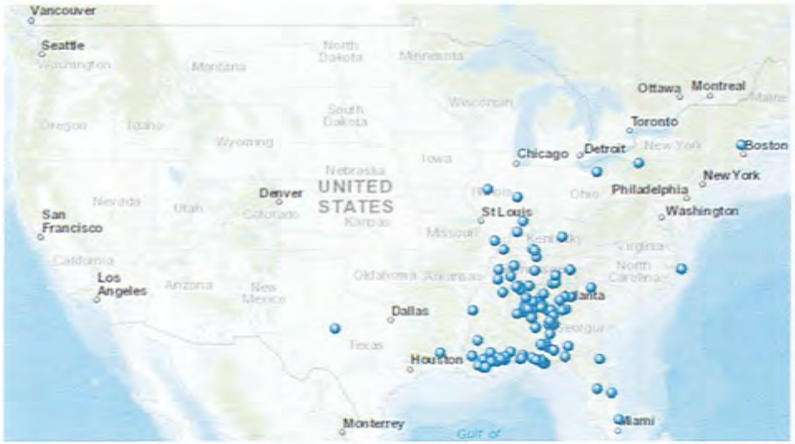
How did you find out about the festival?

Other:

- Car Shows
- Cruisin the coast (2)
- Magazines first time
- Mailing
- Saw the cars driving by

Panama City Beach Convention and Visitors Bureau
Emerald Coast Cruzin'

2016 Respondent Point of Origin



2015 Respondent Point of Origin

State - City							
ALABAMA- 35.0%		Tuscaloosa	1	Lagrange	1	Manito	1
Bessemer	3	Woodland	1	Mariette	1	**INDIANA-1.7%**	
Anniston	2	**FLORIDA- 13.3%**		Mcdonough	1	Evansville	1
Birmingham	2	Panama City	6	Moulthie	1	Washington	1
Clanton	2	Pensacola	2	Roopville	1	**NORTH CAROLINA-1.7%**	
Cullman	2	Boynton Beach	1	Talmo	1	Nags Head	2
Enterprise	2	Clermont	1	**TENNESSEE- 9.2%**		**NEW HAMPSHIRE-0.8%**	
Montgomery	2	Jacksonville	1	Waverly	2	Derry	1
Oxford	2	Milton	1	Bath Springs	1	**OHIO- 0.8%**	
Valley	2	Santa Rosa Bch	1	Bolivar	1	Cleveland	1
Attalla	1	Tallahassee	1	Cleveland	1	**OREGON- 0.8%**	
Columbiana	1	Valparaiso	1	Collegedale	1	Brookings	1
Dothan	1	Vero Beach	1	Decatur	1	**PENNSYLVANIA-0..8%**	
Eufaula	1	**MISSISSIPPI- 11.7%**		Humboldt	1	Bradford	1
Florence	1	Moss Point	3	Murfreesboro	1	**SOUTH CAROLINA-0.8%**	
Fort Payne	1	Biloxi	2	Seymour	1	Simpsonville	1
Gadsden	1	Baldwyn	1	Westmoreland	1	**TEXAS- 0.8%**	
Gardendale	1	Bay Saint Louis	1	**LOUISIANA- 5.8%**		Colorado City	1
Mc Calla	1	Brookhaven	1	Denham Springs	2		
Midland City	1	Gulfport	1	Deridder	1		
Mulga	1	Leland	1	Harvey	1		
Newton	1	Ocean Springs	1	Norco	1		
Oneonta	1	Pascagoula	1	Slidell	1		
Opelika	1	Poplarville	1	Violet	1		
Pell City	1	Southaven	1	**KENTUCKY- 3.3%**			
Pleasant Grove	1	**GEORGIA- 10.8%**		Bowling Green	2		
Rainbow City	1	Columbus	2	Paducah	1		
Russellville	1	Cumming	2	Richmond	1		
Satsuma	1	Donalsonville	1	**ILLINOIS- 2.5%**			
Sumiton	1	Fortson	1	Cobden	1		
Toney	1	Hampton	1	Georgetown	1		

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Beach Home for the Holidays

November 26 - 27, 2016
N=37

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews November 26-27th at a random series of locations throughout Pier Park.

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Panama City Beach Convention and Visitors Bureau

Beach Home for the Holidays

Summary of Festival Survey Responses

Beach Home for the Holidays Reponse Summary

- Respondents were an average age of 56 with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Baby Boomer (50-67) – 52%**
  - **Generation X (29-49) – 26%**
  - Silent Generation (68-86) – 20%
  - Generation Y (18-28) – 3.0%
- 74% of respondents were female, and 26% were male.
- 52% of respondents had a college degree or higher, while an additional 27% had attended some college.
- 80% of respondents reported an adult only travel party, while 20% were families traveling with children.
- Point-of-origin – Respondents came from **14 states Canada** with the largest portion of respondents from **Florida (32%)**, followed by Georgia and then Tennessee.
- Pre-trip planning – Over **70% of respondents said they planned their visit within 2-3 weeks or less**.
- Average length of stay in PCB = 5.6 nights- with 32.4% reporting a lodging expenditure.
- Average party size attending the festival was 2.8 with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.91, on a 5-point scale.
- Overall rating of Home for the Holidays was high at 4.91, on a 5-point scale.
- Average party spending while in PCB: $801.91

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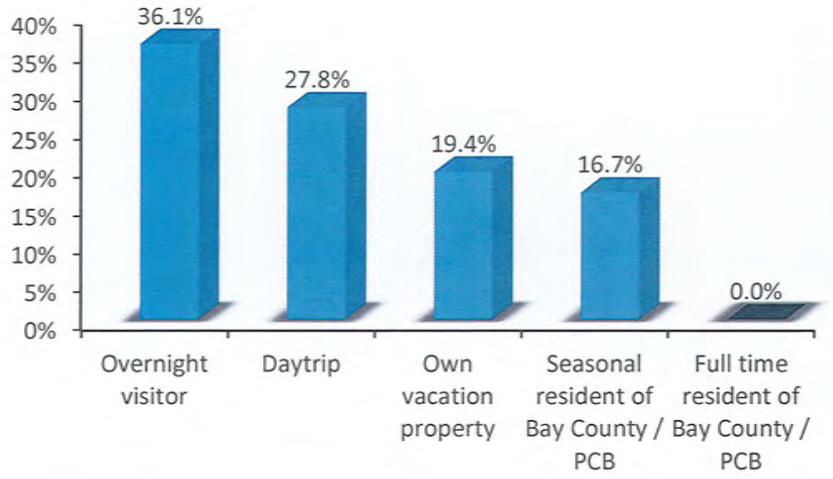
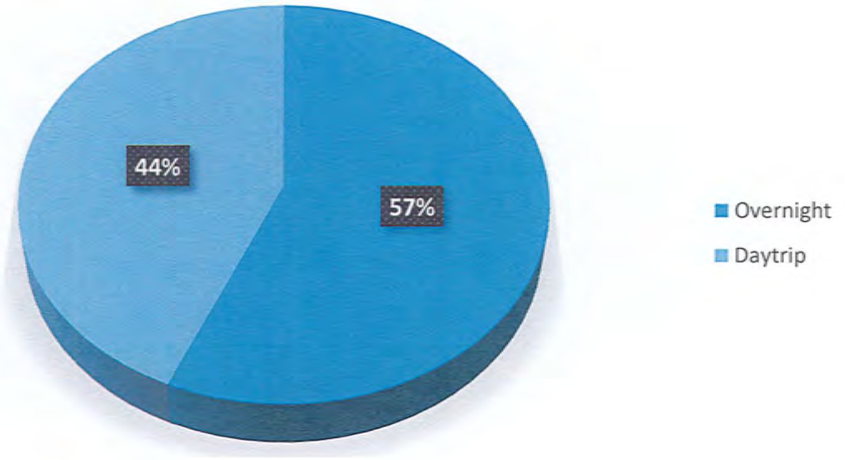
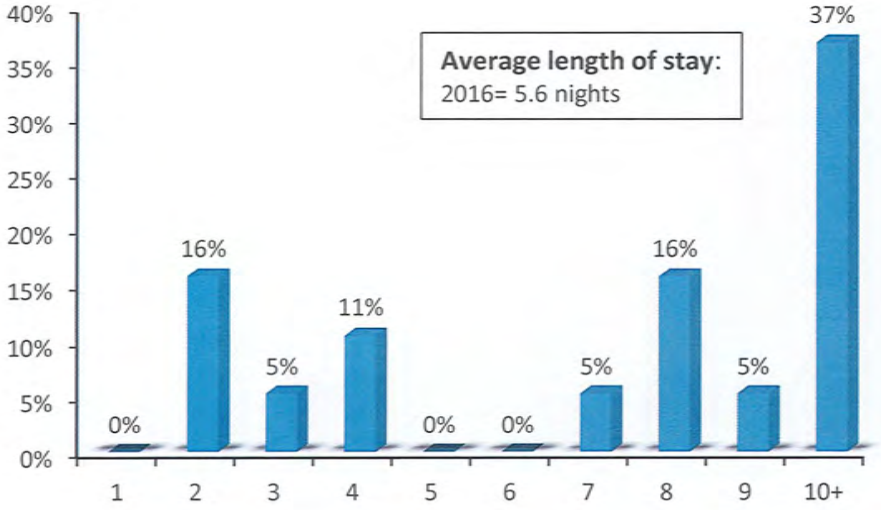
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=36



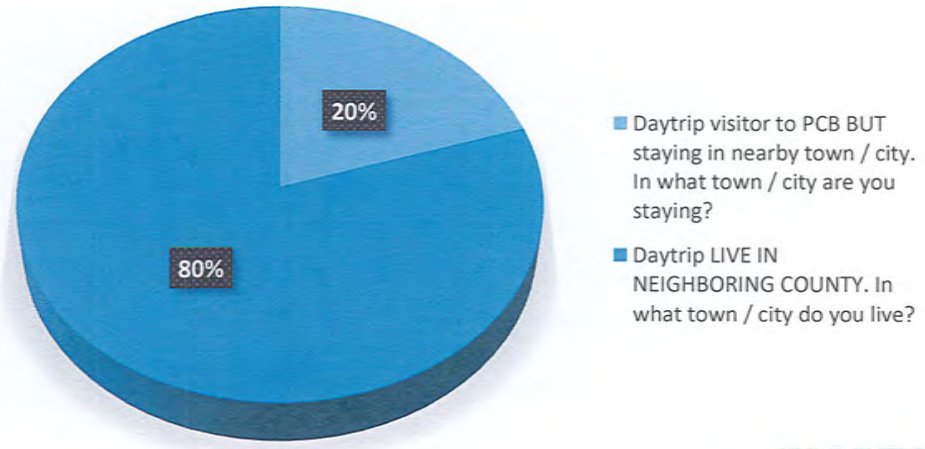
Are you staying in PCB overnight? n=23



Please specify the number of nights you are staying during this visit to PCB. n=19



Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=10



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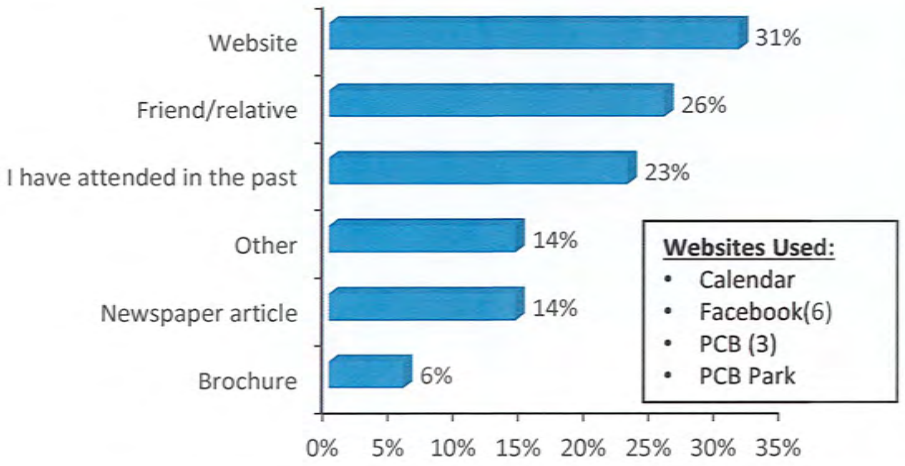
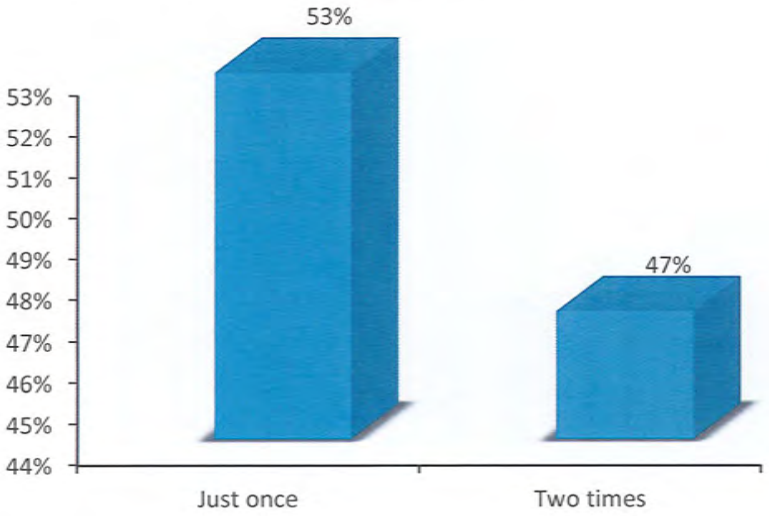
Trip Planning and Purpose

How did you find out about the festival? n=35

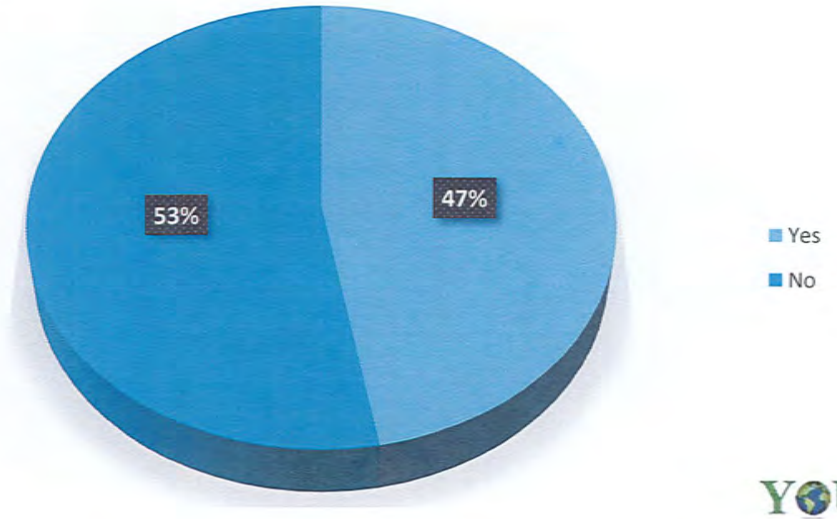


How far in advance did you plan to attend this festival/event? n=31

Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=34



Was attending this festival your primary purpose for visiting Panama City Beach? n=34



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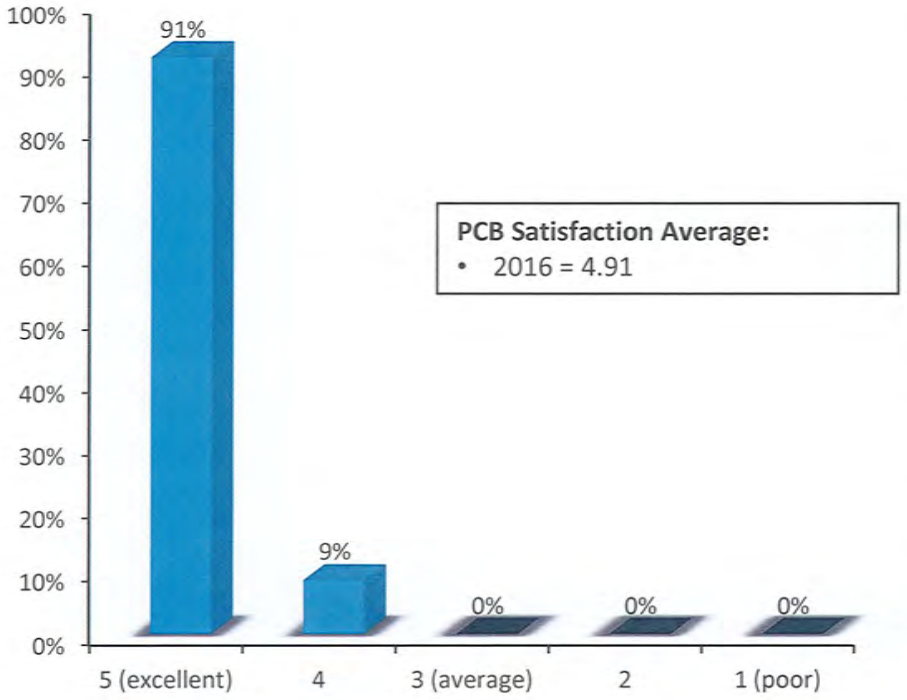
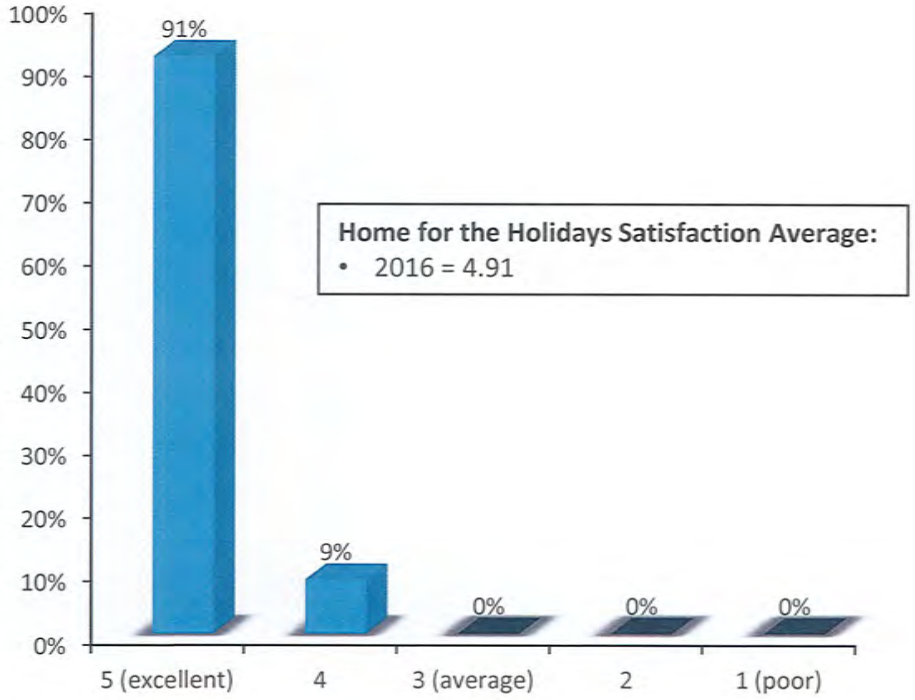
Panama City Beach Convention and Visitors Bureau
Beach Home for the Holidays

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=35



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Home for the Holidays Festival? n=35



Observations:
- Overall trip satisfaction to Panama City Beach as well at festival satisfaction rated high at 4.91, on a 5-point scale.

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Panama City Beach Convention and Visitors Bureau
Beach Home for the Holidays

Travel PARTY Spending (Total Trip)

Spending Category	2016
Lodging	$505.17
(% of reporting)	(16.2%)
Dining/Food	$319.55
(% of reporting)	(29.7%)
Shopping	$285.71
(% of reporting)	(18.9%)
Bars/Nightclubs	$0.00
(% of reporting)	(0.0%)
Local Transportation	$34.38
(% of reporting)	(21.6%)
Tickets/Admissions	$0.00
(% of reporting)	(0.0%)
Average Total Spending Per Travel Party	**$801.91***
(% of reporting)	(29.7%)
Average total # in Travel Party	***2.8***
Average Length of Stay	***5.6 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Verbatim Comments:

How can we improve your experience to this festival?

- Better ad on food
- More fire pits
- No information on chairs needed

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- Apalachicola
- Visiting Son

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Alford, FL (2)
- Bonifay, Fl
- Chipley
- Destin, Fl
- Holt
- Tallahassee, Fl
- Tyndall Air Force Base
-

How did you find out about the festival?

Other:

- Chamber
- Hotel
- TDC Office Visitor
- Visitor center
- Wife in pops orchestra

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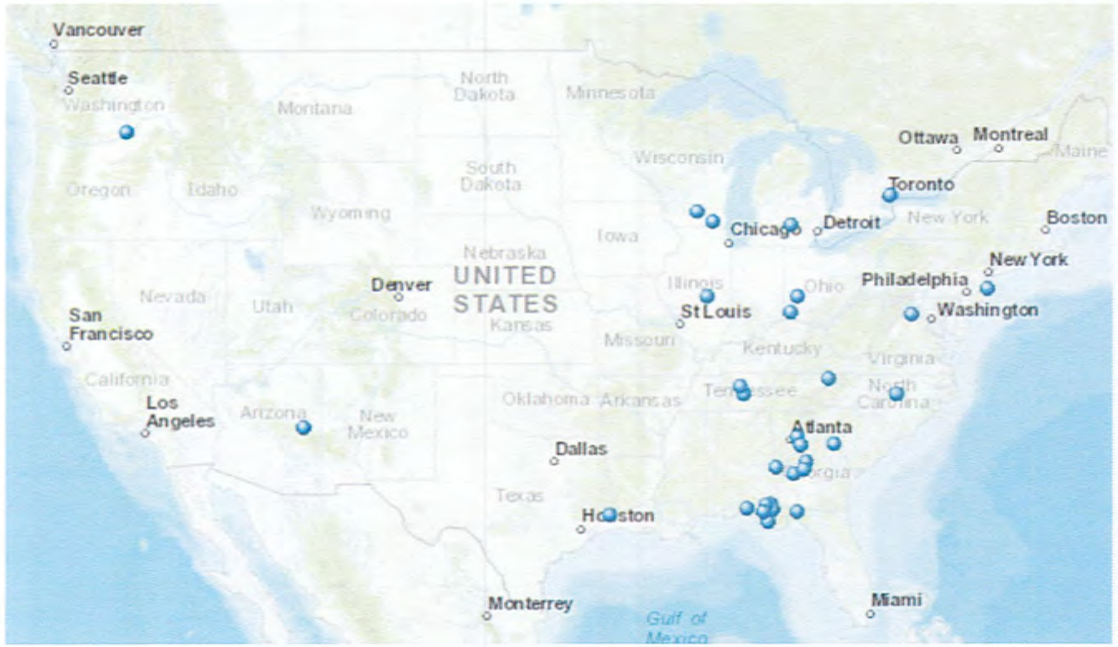
Panama City Beach Convention and Visitors Bureau
Beach Home for the Holidays

2016 Respondent Point of Origin



State - City			
FLORIDA- 32.4%		**ARIZONA- 2.9%**	
	Alford 2		Show Low 1
	Graceville 2	**ILLINOIS- 2.9%**	
	Bonifay 1		Mt Zion 1
	Chipley 1	**NORTH CAROLINA- 2.9%**	
	Destin 1		Apex 1
	Holt 1	**NEW JERSEY- 2.9%**	
	Panama City 1		Brick 1
	Tallahassee 1	**TEXAS- 2.9%**	
	Vernon 1		Buna 1
GEORGIA- 17.6%		**VIRGINIA- 2.9%**	
	Covington 2		White Post 1
	Ellaville 1	**WASHINGTON- 2.9%**	
	Evans 1		Kennewick 1
	Macon 1		
	Perry 1	**INTERNATIONAL**	
TENNESSEE- 8.8%		**CANADA- 100%**	
	Johnson City 1		Toronto 1
	Kingston Springs 1		Windsor 1
	Spring Hill 1		
MICHIGAN- 5.9%			
	Mason 1		
	Missouri 1		
OHIO- 5.9%			
	Cincinnati 1		
	Dayton 1		
WISCONSIN-5.9%			
	Elkhorn 1		
	Madison 1		
ALABAMA- 2.9%			
	Salem 1		

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New Year's Eve Beach Ball Drop

December 31, 2016
N=136

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews December 31st at a random series of locations throughout Pier Park.

Panama City Beach Convention and Visitors Bureau
New Year's Eve Beach Ball Drop

Summary of Festival Survey Responses

New Year's Eve Beach Ball Drop Reponse Summary

- Respondents were an average age of 43 with the following generational break down (100% of respondents were adults 18+ years of age):
  - **Generation X (29-49) – 60%**
  - **Generation Y (18-28) – 10%**
  - Baby Boomer (50-67) – 29%
  - Silent Generation (68-86) – 1%
- 75% of respondents were female, and 25% were male.
- 45% of respondents had a college degree or higher, while 20% of visitors said they attended some college.
- 61.2% of respondents reported an adult only travel party, while 38.3% were families traveling with children.
- Point-of-origin – Respondents came from **20 states** with the largest portion of respondents from **Florida (27%)**, followed by Georgia and then Alabama.
- Pre-trip planning – **56% of respondents said they planned their visit within one week or less.**
- Average length of stay in PCB = 5 nights
- Average party size attending the festival was 4.0, up from 2.8 in 2015, with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.93, significantly higher than the 2015 rating of 4.60, and was the highest rate
- Overall rating of the New Year's Eve Festival was 4.96 on a 5-point scale. This is the highest ranking of all 9 festivals surveyed.
- Average party spending while in PCB: **$893.79**, up from 2015 total spending of $880.76

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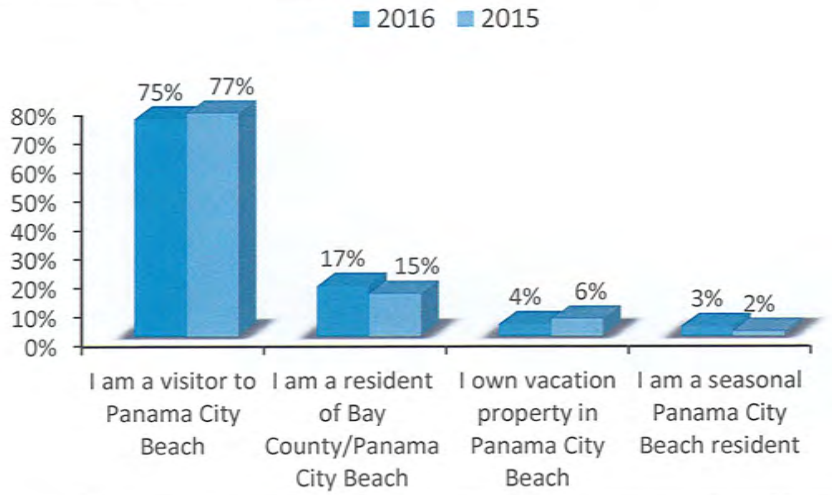
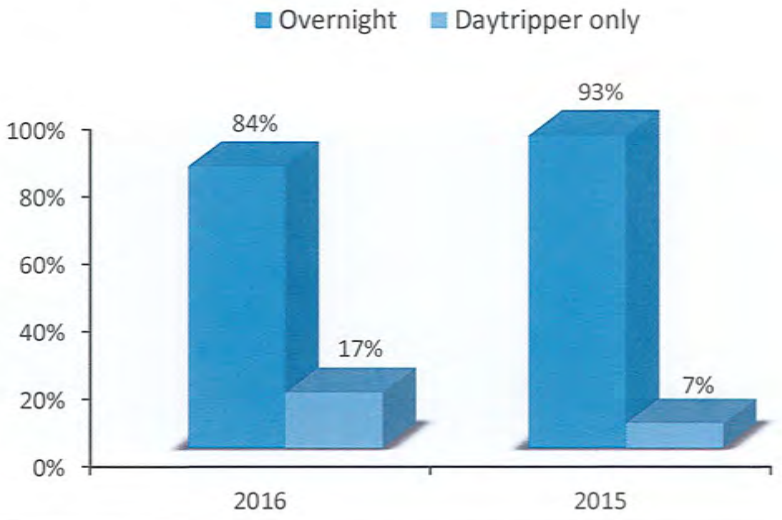
Panama City Beach Convention and Visitors Bureau
New Year's Eve Beach Ball Drop

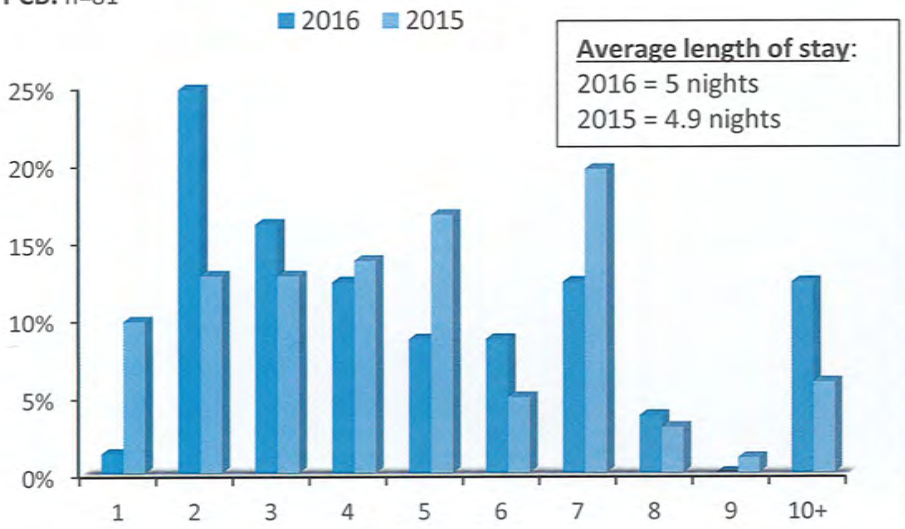
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=121



Are you staying in PCB overnight? n=91

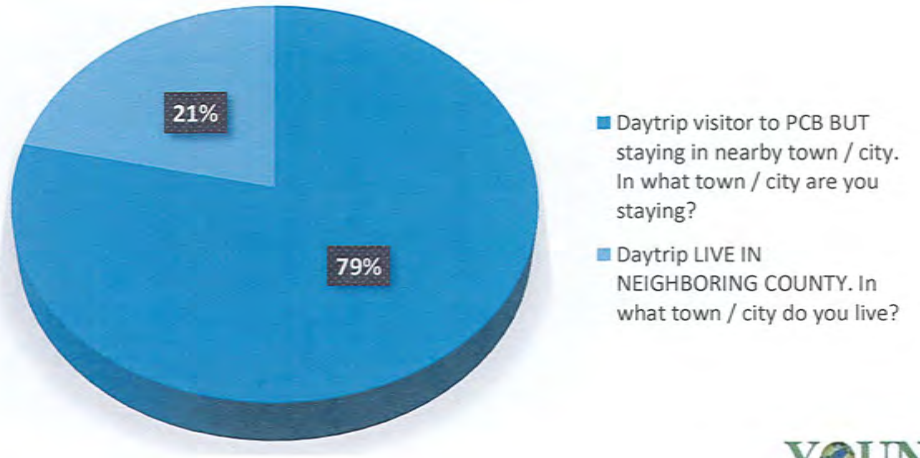


Please specify the number of nights you are staying during this visit to PCB. n=81



Average length of stay:
2016 = 5 nights
2015 = 4.9 nights

Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=14



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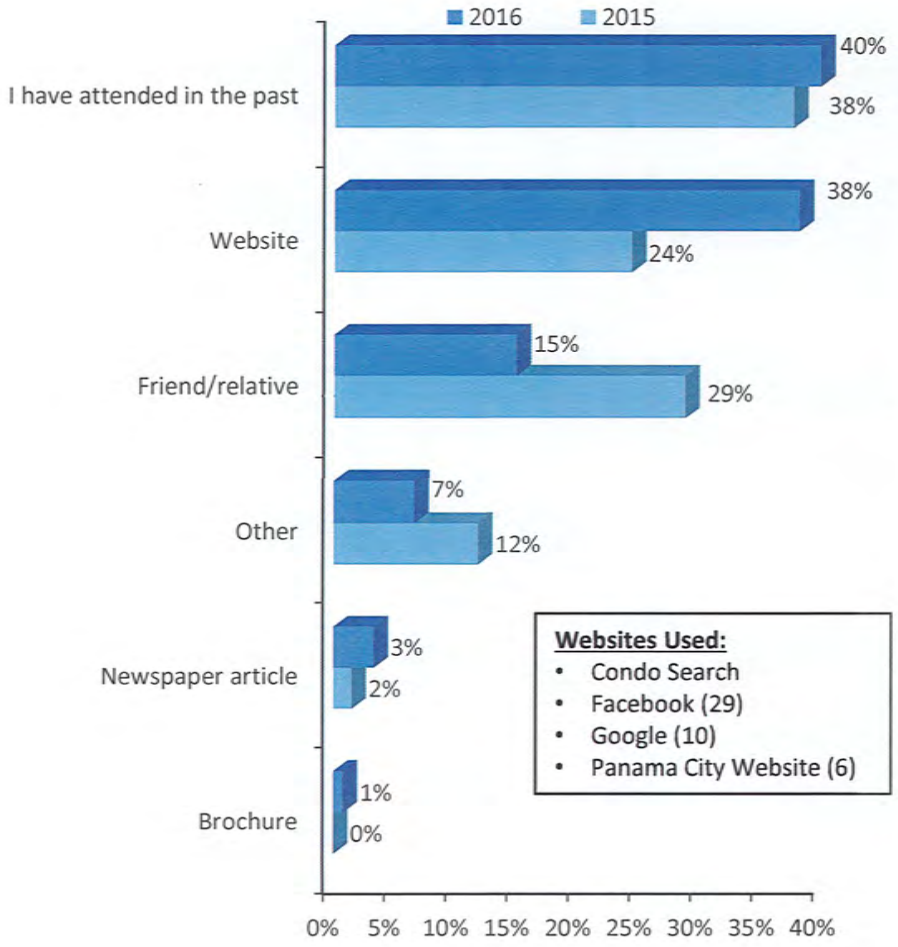
Panama City Beach Convention and Visitors Bureau
New Year's Eve Beach Ball Drop

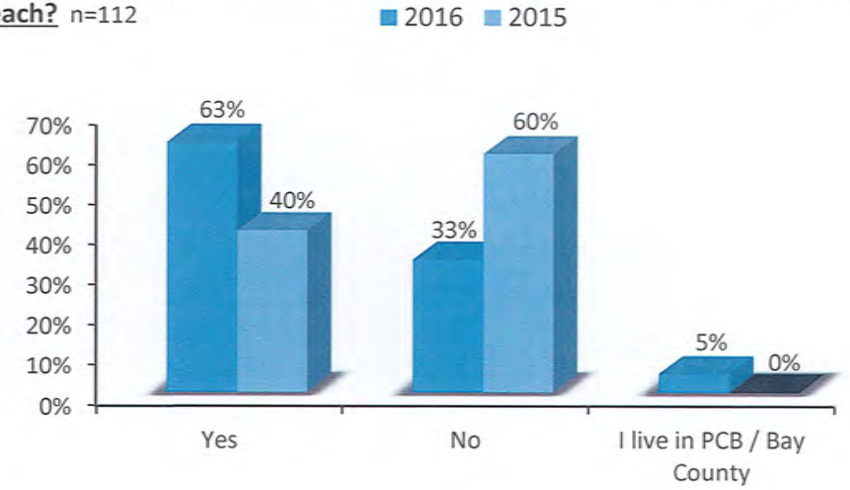
Trip Planning and Purpose

How did you find out about the festival? n=121



How far in advance did you plan to attend this festival/event? n=116

Was attending this festival your primary purpose for visiting Panama City Beach? n=112



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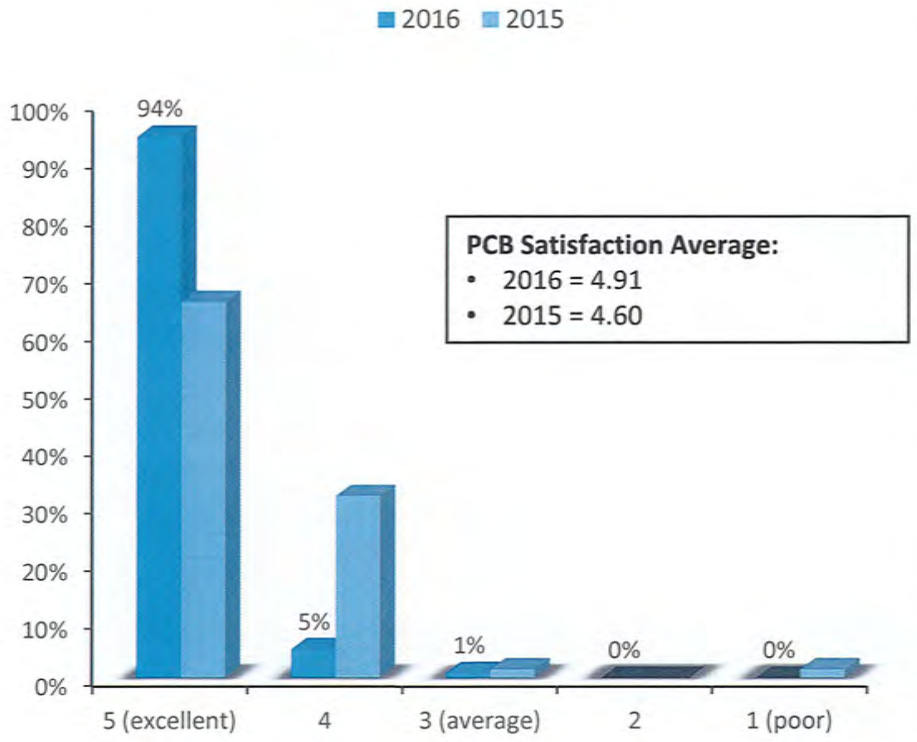
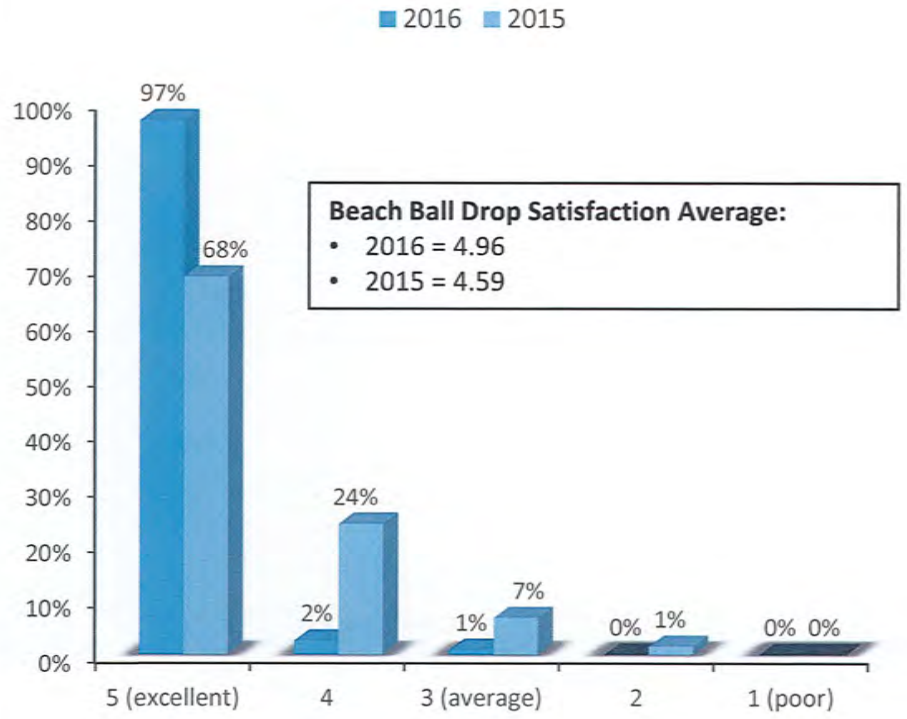
Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=121



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the New Year's Eve Beach Ball Drop Festival?
n=121



Observations:
- Overall trip satisfaction to Panama City Beach ranked highly at 4.91, on a 5-point scale.
- Beach Ball Drop overall satisfaction rated very highly at 4.96, on a 5-point scale, and is the highest festival rating out of the 9 surveyed in 2016.

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Panama City Beach Convention and Visitors Bureau
New Year's Eve Beach Ball Drop

Travel PARTY Spending (Total Trip)

Spending Category	2016	2015
Lodging	$490.07	$518.37
(% of reporting)	(45.4%)	(46.3%)
Dining/Food	$407.58	$320.07
(% of reporting)	(50.4%)	(72.8%)
Shopping	$241.38	$229.32
(% of reporting)	(38.8%)	(50.0%)
Bars/Nightclubs	$0.00	$132.63
(% of reporting)	(0.0%)	(14.0%)
Local Transportation	$41.73	$63.74
(% of reporting)	(18.2%)	(28.7%)
Tickets/Admissions	$108.57	$54.58
(% of reporting)	(5.7%)	(8.8%)
Average Total Spending Per Travel Party	**$893.79***	**$880.76***
(% of reporting)	(56.2%)	(76.5%)
Average total # in Travel Party		***2.8***
Average Length of Stay	***nights***	***4.9 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

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Verbatim Comments:

How can we improve your experience to this festival?

- Advertising

Daytrip visitor to PCB BUT staying in nearby town / city. In what town / city are you staying?

- Bonitay
- Cottondale
- Crestview
- Destin
- Dothien
- Fountain
- Inlet beach
- Lynhaven
- Mariana
- Seagrove
- Tallahassee

Daytrip LIVE IN NEIGHBORING COUNTY. In what town / city do you live?

- Bonitay
- Chipley
- Talahasee

How did you find out about the festival?

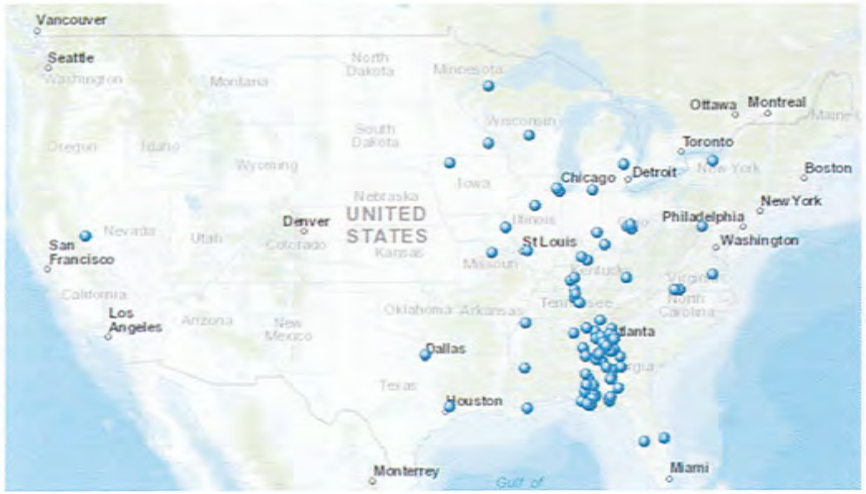
Other:

- Driving by (4)
- Summer
- TV (3)

Panama City Beach Convention and Visitors Bureau

New Year's Eve Beach Ball Drop

2016 Respondent Point of Origin



2015 Respondent Point of Origin

State - City							
FLORIDA- 27.0%		Ellerslie	1	Lacon	1	**IOWA- 0.9%**	
Panama City	9	Duluth	1	Oak Lawn	1	Spencer	1
Panama City Bch	4	Douglasville	1	Troy	1	**LOUISIANA- 0.9%**	
Tallahassee	4	Dawsonville	1	**KENTUCKY- 4.5%**		Meraux	1
Fountain	2	Dallas	1	Aberdeen	1	**MISSOURI- 0.9%**	
Lynn Haven	2	Calhoun	1	Dunmore	1	Jefferson City	1
Westville	2	Buena Vista	1	Florence	1	**NEVADA- 0.9%**	
Bonifay	1	Andersonville	1	Hazard	1	Reno	1
Chipley	1	Alpharetta	1	Louisville	1	**NEW YORK- 0.9%**	
Cottondale	1	Albany	1	**OHIO- 3.6%**		Ontario	1
Lakeland	1	**ALABAMA- 10.8%**		Columbus	3	**PENNSYLVANIA- 0.9%**	
Marianna	1	Alexander City	2	Radcliff	1	McConnellsburg	1
Melbourne	1	Cullman	1	**VIRGINIA- 2.7%**		**WISCONSIN- 0.9%**	
Santa Rosa Bch	1	Daleville	1	Danville	1		
GEORGIA- 26.1%		Doster	1	Richmond	1		
LaGrange	3	Dothan	1	Ridgeway	1		
Lawrenceville	2	Elba	1	**INDIANA- 1.8%**			
Fayetteville	2	Enterprise	1	Connersville	1		
Smyrna	1	Rainsville	1	Depauw	1		
Roswell	1	Talladega	1	**MICHIGAN- 1.8%**			
Rome	1	Troy	1	Lapeer	1		
Moultrie	1	Valley	1	Sturgis	1		
Macon	1	**TENNESSEE- 5.4%**		**MINNESOTA- 1.8%**			
Leesburg	1	Nashville	2	Cloquet	1		
Jackson	1	Hendersonville	1	Rochester	1		
Hogansville	1	Johnson City	1	**MISSISSIPPI- 1.8%**			
Hawkinsville	1	Murfreesboro	1	Hernando	1		
Griffin	1	Orlinda	1	Jackson	1		
Grayson	1	**ILLINOIS- 4.5%**		**TEXAS- 1.8%**			
Felton	1	Berkeley	1	Houston	1		
		Bloomfield	1	Plano	1		

YOUNG strategies, inc.

Young Strategies, Inc.
Research Team Experience

Panama City Beach Convention and Visitors Bureau
Research Team

Young Strategies, Inc. (YSI) is a research and planning firm focusing on destination marketing organizations and travel destinations. The three principal members of this project team have conducted research and strategic planning with over 100 DMOs in twenty-six states. YSI's approach is to custom tailor each research study to the specific needs of the destination. The final report will be an easy to read document that presents the customer-focused data with recommendations for action. YSI is a small boutique firm that develops a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, rural tourism development and convention center management.

Berkeley W. Young, President - Project Team Leader

20 years of travel/tourism marketing and management experience including destination marketing and hotel management. Young's experience includes serving as the Executive Director of a start-up convention and visitors bureau and chamber of commerce in which he oversaw the creation and success of a research-based tourism marketing program for a rural county in the mountains of North Carolina. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by Interstate Hotels Corporation. Young joined Randall Travel Marketing in 1998 as Vice President conducting research for DMOs throughout the United States. He opened Young Strategies in November 2004 focusing on strategic planning and research for destination marketing organizations.

Amy Stevens, Vice President - Lodging Market Analysis, Research Coordination

15 years of travel, tourism and marketing experience. As Vice President/Research Director, Stevens is responsible for writing surveys, conducting research, analyzing data and writing reports for Young Strategies. Stevens worked with Randall Travel Marketing prior to working for Young Strategies. Stevens also worked with Navigant International, the second largest travel management company in the United States, and was responsible for sales, business travel accounts, training and development and conflict resolution. She handled written and multi-media presentations and developed marketing materials and programs to increase both leisure and corporate business travel.

Larry Gustke, PhD - Destination Analytics - Oversight of Research Process and Validation

Over 30 years' experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Dr. Gustke has conducted research in over 30 U.S. states and internationally. Dr. Gustke has also conducted extensive research among outdoor dramas in North America. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience. He received his Ph.D. from Texas A&M, and is considered one of the most accomplished tourism researchers in the field today. Dr. Gustke is active in the Travel and Tourism Research Association (TTRA), and in many other academic and professional networks related to tourism research. Dr. Gustke is a founding partner of Destination Analytics.

Alexa Gifford, Research Analyst - Online Survey Supervision, Data Tabulation and Analysis

25 years of marketing and management experience including destination marketing and facility management. Gifford's experience most recently includes serving as the Executive Director of a start-up wine and culinary center in which she oversaw the creation and success of educational programs that developed partnerships with producers, vendors, farmers, winery owners and educational institutions across New York State. Prior to that Gifford was president of a 14-county regional tourism association in the Finger Lakes region of New York. While at this association, Gifford successfully lead the development and implementation of research based marketing and sales programs for this diversified vacation destination. Alexa's role on the team is to work closely with constituents within the destination to collect data, monitor research return rates and data accuracy as well as assisting in the compilation of final report data. Gifford lives with her family in Penn Yan, New York.