



PANAMA CITY BEACH

2019 Visitor Behavior Observations





Purpose

To document the profile and planning preferences of those who visited Panama City Beach, Florida in Winter, 2018 or Spring/Summer/Fall, 2019. The survey data in this report covers the period December, 2018 through November, 2019. The annual 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

Young Strategies, Inc. (YSI) has been conducting visitor profile research for Panama City Beach since 2011. The same online survey instrument, prepared by the Young Strategies, Inc. (YSI) research team and approved by the Panama City Beach Convention & Visitors Bureau (PCBCVB), has been used over the eight-year period 2011 – 2019, to capture visitor perceptions of PCB. Travel industry partners in PCB were provided unique web-links to the online visitor survey that were emailed to their visitor databases. Email recipients were invited to take a visitor survey and be entered into a chance to win one of six \$200 Visa gift cards. Surveys were also collected through the PCBCVB website and visitor inquiry database; or signed-in at PCBCVB Visitor Center's guestbook.

The number of surveys completed by respondents who identified themselves as leisure visitors to Panama City Beach in Winter, 2018 or Spring/Summer/Fall, 2019 totaled 1,744. Additionally, this report provides data specific to the season respondents identified as their most recent visit to Panama City Beach. Total visitor survey collection over the six-year period 2013 – 2019 is shown below.

Season	2013	2014	2015	2016	2017	2018	2019
Winter (Dec – Feb)	400	195	183	306	354	304	214
Spring (Mar – May)	564	441	406	470	400	380	511
Summer (Jun - Aug)	761	1,236	986	850	765	718	715
Fall (Sep – Nov)	195	449	354	367	540	457	304
<u>Total Season Responses</u>	<u>1,920</u>	<u>2,321</u>	<u>1,929</u>	<u>1,993</u>	<u>2,059</u>	<u>1,859</u>	<u>1,744</u>



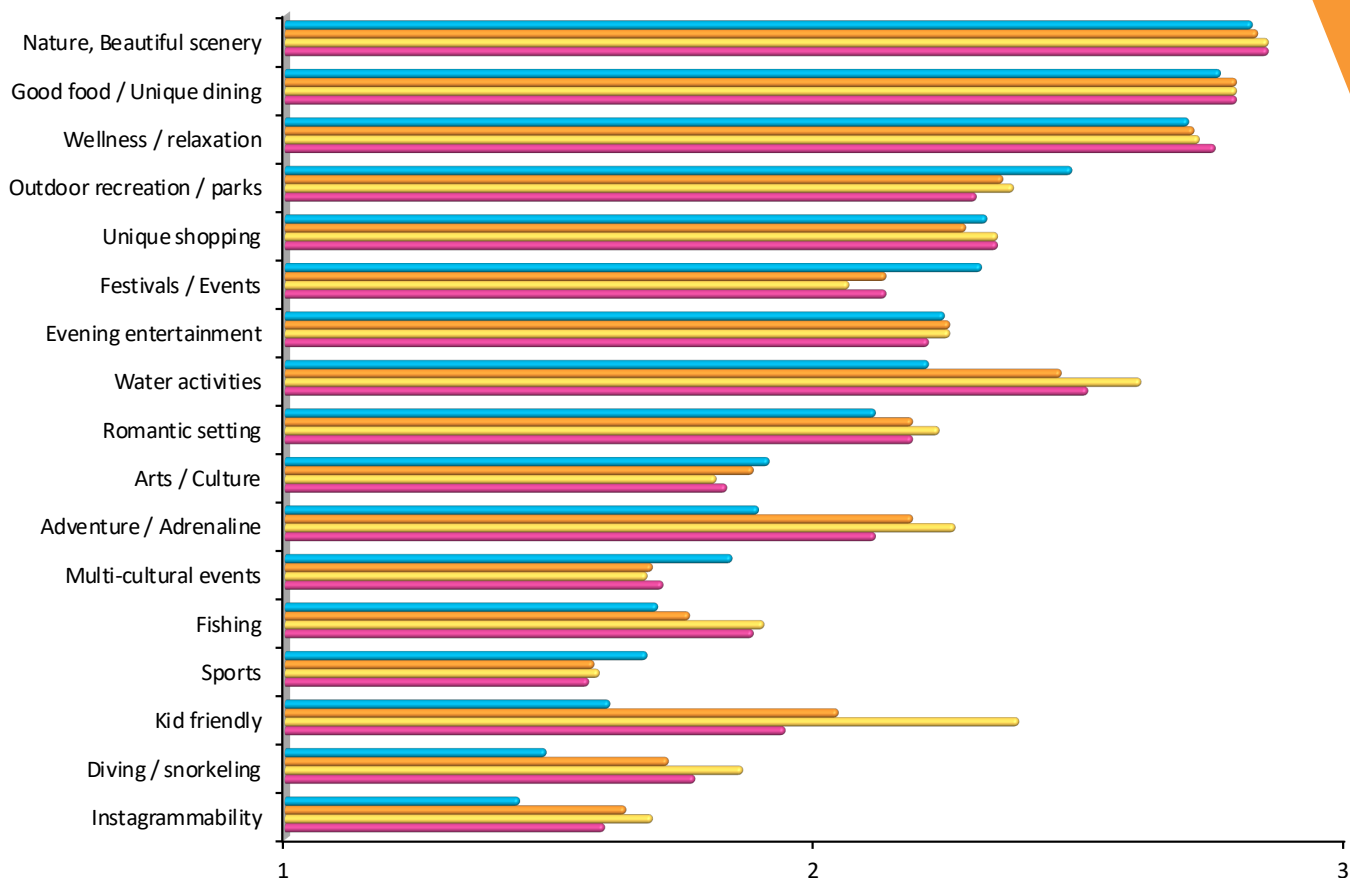
TRAVEL INFORMATION AND PLANNING

-3-

Please tell us the level of importance for each of the following attributes when selecting a getaway / vacation destination?
Please use the scale provided below where 3 is always, 2 is sometimes and 1 is never.

■ Winter n=207 ■ Spring n=495 ■ Summer n=699 ■ Fall n=292

2019 ALL n=1,697	Always	Sometimes	Never	Weighted Average
Nature, Beautiful scenery	84.9%	14.2%	0.9%	2.84
Good food / Unique dining	79.5%	19.5%	1.0%	2.79
Wellness / relaxation	74.8%	22.5%	2.7%	2.72
Water activities	54.2%	41.6%	4.2%	2.5
Outdoor recreation / parks	41.9%	52.9%	5.2%	2.37
Unique shopping	39.3%	53.5%	7.2%	2.32
Evening entertainment	32.3%	59.4%	8.3%	2.24
Romantic setting	29.9%	59.6%	10.6%	2.19
Adventure / Adrenaline	28.0%	60.8%	11.3%	2.17
Festivals / Events	22.7%	67.0%	10.3%	2.12
Kid friendly	36.9%	37.5%	25.7%	2.11
Arts / Culture	8.6%	67.5%	23.9%	1.85
Fishing	17.4%	48.6%	34.0%	1.83
Diving / snorkeling	15.8%	44.5%	39.7%	1.76
Multi-cultural events	8.2%	54.5%	37.3%	1.71
Instagrammability	13.2%	36.5%	50.3%	1.63
Sports	6.2%	47.1%	46.7%	1.59

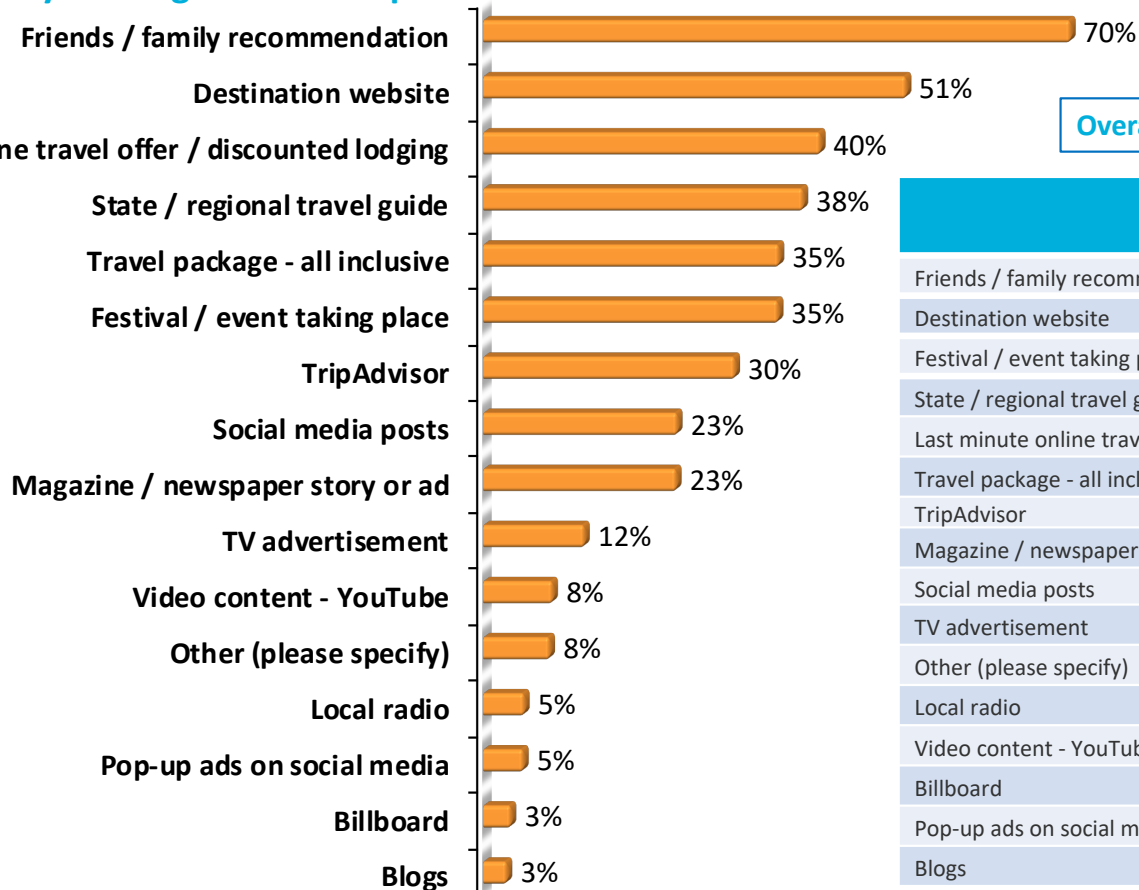




TRAVEL INFORMATION AND PLANNING

-4-

Please select any of the following that influence or inspire your selection of a destination when planning any overnight leisure trip.



Overall response in chart, seasonal response data in table

	Winter n=205	Spring n=492	Summer n=692	Fall n=289
Friends / family recommendation	71.7%	70.7%	71.8%	65.1%
Destination website	56.1%	48.4%	49.0%	55.0%
Festival / event taking place	49.3%	38.2%	28.5%	36.3%
State / regional travel guide	42.4%	37.4%	38.4%	36.3%
Last minute online travel offer / discounted lodging	40.5%	44.1%	38.9%	37.0%
Travel package - all inclusive	36.1%	36.6%	37.4%	28.0%
TripAdvisor	31.2%	30.3%	31.4%	26.6%
Magazine / newspaper story or ad	26.3%	23.6%	22.1%	22.8%
Social media posts	16.1%	19.3%	27.8%	24.6%
TV advertisement	12.7%	11.8%	12.1%	12.5%
Other (please specify)	8.8%	8.3%	7.4%	7.6%
Local radio	6.3%	4.5%	5.5%	3.5%
Video content - YouTube	4.4%	8.9%	9.5%	7.3%
Billboard	3.9%	1.6%	4.2%	3.5%
Pop-up ads on social media	2.9%	5.1%	4.9%	5.5%
Blogs	0.5%	2.6%	3.5%	3.5%

0% 10% 20% 30% 40% 50% 60% 70% 80%



TRAVEL INFORMATION SOURCES AND PLANNING

-5-

Tell us your preferred online sources when planning a vacation / getaway?

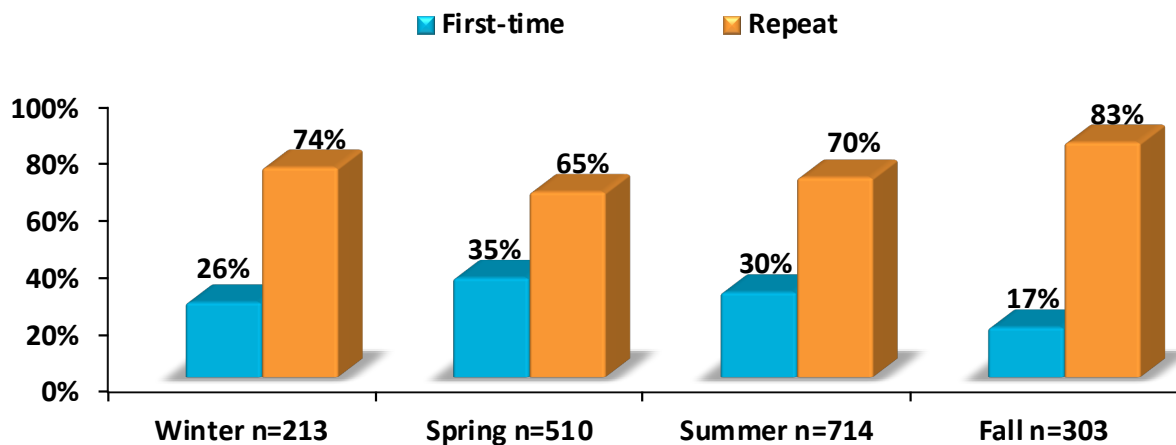
	Winter n=206	Spring n=495	Summer n=697	Fall n=288
Google / Bing search	51.0%	52.1%	49.2%	42.7%
VRBO, AirBNB, Home Away, etc.	50.5%	48.1%	47.8%	43.1%
TripAdvisor, Orbitz, Expedia, Kayak, etc.	46.6%	50.1%	48.5%	46.9%
Destination website or digital travel guide	45.6%	42.2%	37.5%	44.4%
State website or travel guide	42.7%	37.0%	36.2%	37.2%
Hotel website	29.1%	35.4%	32.7%	37.9%
Airline website	13.1%	11.5%	6.0%	5.9%
Travel Agent	9.2%	5.1%	3.9%	2.4%
Other	7.8%	5.7%	5.2%	6.3%





FIRST-TIME vs REPEAT VISITORS

-6-



How many times have you visited Panama City Beach in the prior 12 months?

# of visits in prior 12 months	First time	2	3	4	5	6	7	8	9	10	11	12	13	15	17	20+
Winter n=158	19.0%	58.9%	8.2%	1.9%	2.5%	2.5%	0.6%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%	0.0%	0.6%	4.4%
Spring n=333	26.1%	48.4%	9.9%	4.8%	3.3%	3.3%	0.3%	0.9%	0.0%	0.6%	0.0%	0.9%	0.0%	0.0%	0.0%	1.5%
Summer n=503	26.4%	51.9%	8.2%	3.8%	2.8%	1.4%	1.2%	0.4%	0.2%	1.4%	0.0%	0.4%	0.0%	0.4%	0.0%	1.6%
Fall n=251	20.3%	53.0%	11.6%	3.6%	2.8%	3.2%	0.8%	0.0%	0.0%	1.2%	0.4%	0.8%	0.4%	0.4%	0.4%	1.2%



FIRST-TIME vs REPEAT VISITORS

-7-

How many years have you been coming to Panama City Beach?

	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20+
Winter n=158	12.0%	9.5%	8.9%	12.0%	5.1%	5.7%	6.3%	3.8%	7.0%	3.2%	0.6%	1.3%	0.0%	0.6%	0.6%	0.0%	1.3%	1.9%	20.3%
Spring n=333	17.1%	10.2%	6.6%	9.3%	3.3%	1.8%	3.0%	1.5%	7.2%	0.6%	1.2%	0.3%	0.6%	2.7%	0.0%	1.2%	0.0%	0.0%	33.3%
Summer n=503	10.7%	9.5%	6.8%	7.0%	4.4%	2.4%	3.6%	1.2%	4.8%	0.8%	1.2%	0.6%	1.2%	3.0%	1.2%	0.2%	0.8%	0.8%	40.0%
Fall n=251	6.4%	5.6%	7.6%	10.4%	1.6%	2.0%	2.4%	2.0%	7.2%	0.4%	2.0%	0.4%	0.0%	6.0%	1.6%	1.2%	0.4%	0.4%	42.6%





TRAVEL PARTY MAKEUP & LODGING TYPE

-8-

Do any of the following describe your travel party on your most recent visit:

	Winter n=203	Spring n=485	Summer n=681	Fall n=283
Empty nesters - (no children living in the household)	49.8%	18.6%	7.3%	28.6%
Mature couples (45 - 54 years of age)	16.3%	18.4%	6.9%	21.9%
Long weekend family getaway	2.5%	8.5%	4.6%	6.4%
Young family with children under age of 5	2.0%	2.3%	1.6%	2.5%
Young couples (25 - 44 years of age)	2.0%	7.4%	4.1%	5.7%
Summer family vacation	1.5%	26.4%	70.5%	15.9%
Sports family - participating in event/tournament	1.0%	0.4%	0.2%	0.7%
None of the above	25.1%	18.1%	4.9%	18.4%

How would you categorize the place that you stayed during your most recent visit?

	Winter n=203	Spring n=485	Summer n=681	Fall n=283
Vacation condo/townhouse rental	67.0%	50.9%	50.7%	47.4%
Hotel/Motel	13.8%	26.4%	26.1%	29.0%
Vacation house rental	5.9%	3.9%	7.6%	4.6%
OWNER of vacation house/condo (non-resident)	4.9%	7.4%	5.6%	9.5%
Friends or family house/condo	3.5%	4.3%	5.0%	3.9%
Campground/RV PARK	2.5%	3.1%	1.5%	1.4%
Timeshare	2.0%	3.9%	3.5%	3.9%
Religious Retreat Center	0.5%	0.0%	0.0%	0.4%



TRAVEL PARTY MAKEUP & VACATION PROPERTY TYPE

-9-

Please tell us the type of vacation rental property that your party stayed in:

	Winter n=156	Spring n=301	Summer n=429	Fall n=174
Gulf-front condo	80.8%	82.7%	76.5%	77.0%
Non gulf-front condo	5.1%	8.6%	6.3%	8.1%
Gulf-front townhouse or house	3.2%	4.7%	6.8%	7.5%
Non gulf-front townhouse or house	10.9%	4.0%	10.5%	7.5%

How many bedrooms were in the rental unit where you stayed?

	Winter n=156	Spring n=302	Summer n=433	Fall n=173
One	19.2%	25.8%	17.8%	24.9%
Two	48.1%	43.1%	44.8%	40.5%
Three	25.6%	24.8%	26.8%	26.0%
Four	4.5%	3.0%	5.3%	2.3%
Five	0.6%	1.3%	2.8%	2.9%
Six	0.0%	0.3%	0.5%	1.2%
Seven	0.0%	0.3%	0.2%	0.0%
Other	1.9%	1.3%	1.9%	2.3%

How did you reserve your vacation rental?

	Winter n=157	Spring n=302	Summer n=433	Fall n=174
Resort / Rental agency	27.4%	15.2%	17.3%	24.7%
VRBO	23.6%	31.8%	37.6%	26.4%
HomeAway	1.9%	7.3%	7.2%	4.6%
Airbnb	2.6%	9.9%	5.3%	5.2%
Other online booking sites	6.4%	7.3%	7.6%	8.1%
Direct from owner	30.6%	14.2%	15.9%	14.9%
I own the property - no reservation necessary	4.5%	8.3%	3.5%	11.5%
Other	3.2%	6.0%	5.5%	4.6%



ATTRACTIONS & ACTIVITIES

-10-

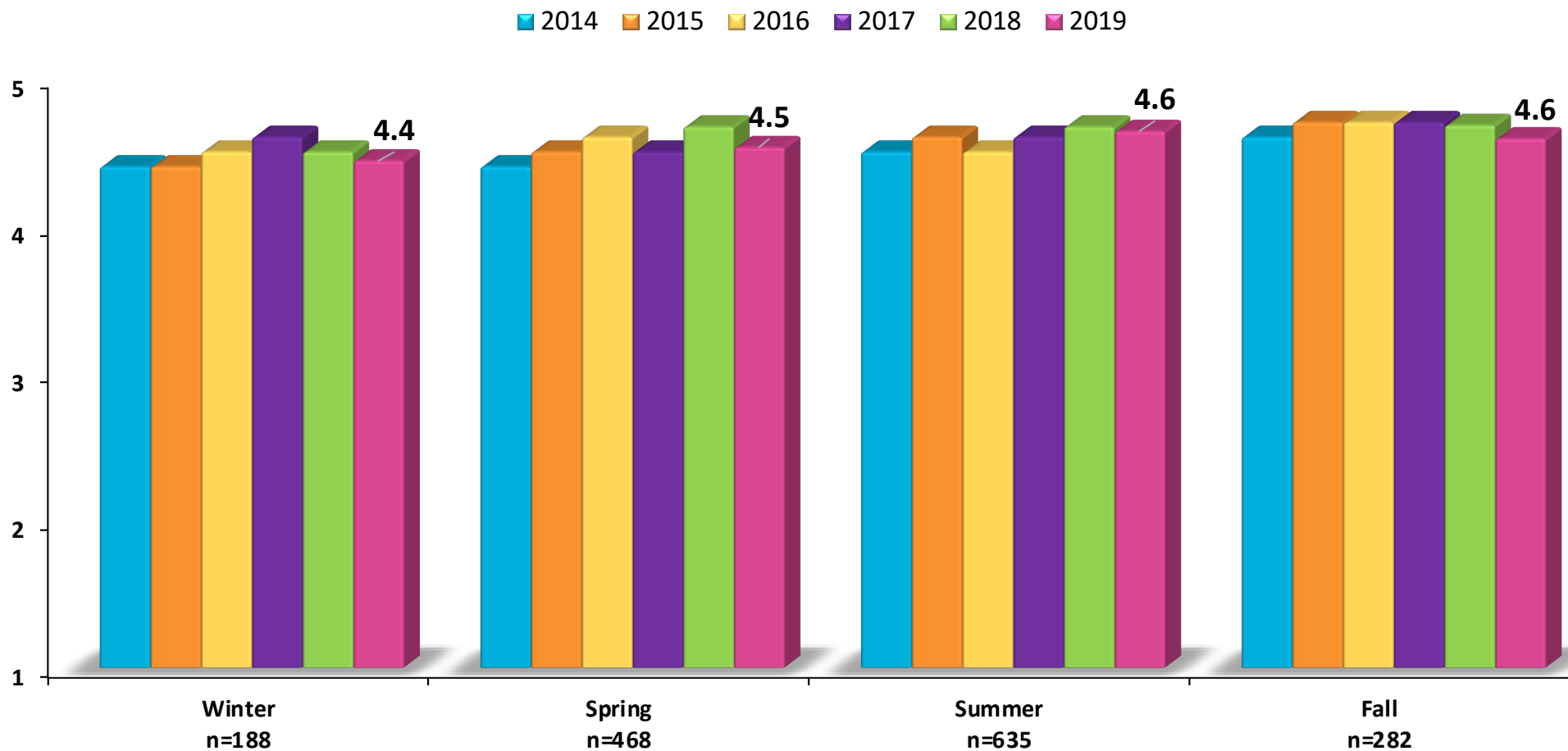
	Winter n=195	Spring n=473	Summer n=643	Fall n=280
Beach	96.4%	94.5%	94.9%	93.6%
Pier Park	90.3%	79.5%	77.6%	79.3%
Captain Andersons Marina	51.3%	37.6%	35.6%	40.4%
County Pier	46.2%	32.4%	35.2%	27.9%
Dave & Buster's	35.4%	21.4%	27.7%	32.5%
Shipwreck Island	30.8%	25.6%	24.3%	27.1%
St. Andrew's State Park	29.2%	18.6%	29.9%	28.2%
Aaron Bessant Park (concerts)	25.6%	15.2%	17.3%	16.8%
Frank Brown Park (ball fields/Aquatic park)	16.4%	14.6%	16.2%	16.4%
Go carting	13.3%	13.3%	16.0%	10.0%
Golf course	12.3%	17.8%	25.5%	19.6%
Thomas Drive	27.7%	6.3%	2.3%	3.9%
Carillon Beach	25.1%	4.7%	2.2%	3.6%
Church Retreat Center	24.1%	5.9%	7.3%	7.1%
Edgewater/Holiday Inn area	16.4%	4.9%	5.3%	4.6%
Gulf World	8.2%	9.9%	8.9%	6.4%
Putt putt/mini golf	7.7%	3.4%	2.8%	3.6%
Ripley's Believe It or Not	7.7%	12.7%	15.4%	7.1%
Sandpiper Beacon Beach	5.6%	8.3%	13.7%	9.3%
Sharkys Harpoon Harry's	5.1%	4.4%	4.5%	4.3%
Thomas Donut Shop	5.1%	8.3%	11.4%	5.7%
WonderWorks	4.6%	0.4%	0.5%	0.4%
Zoo World	3.6%	7.0%	14.2%	6.8%
Sky Wheel	2.6%	9.9%	20.4%	11.1%
Zoo World- pet a sloth	2.6%	2.1%	10.0%	11.4%
Swim with dolphins	2.6%	0.9%	3.9%	1.4%
Rental - Golf cart	1.0%	2.1%	5.3%	3.9%
Rental - Jet Ski	0.5%	2.3%	3.3%	1.1%
Rental - Pontoon boat	0.0%	0.2%	1.4%	0.4%
Other (please specify)	0.0%	0.9%	4.5%	2.1%



SATISFACTION RATING

-11-

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?





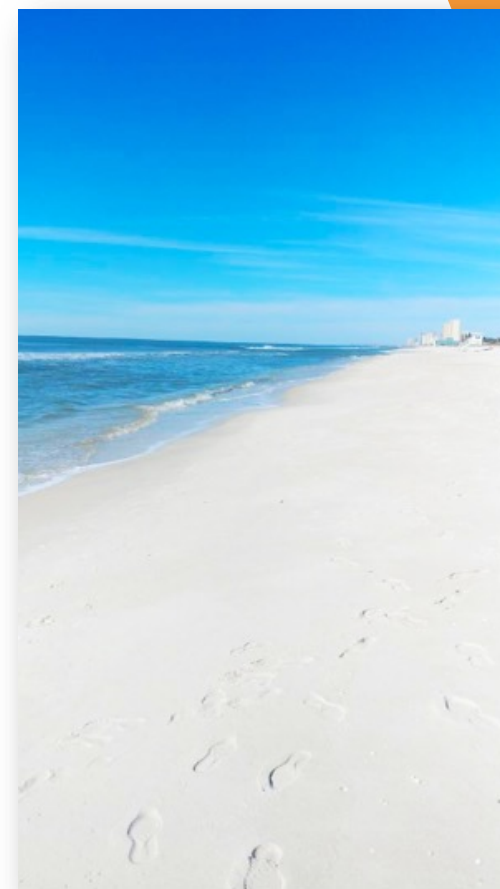
AMENITIES RATINGS

-12-

Following is a list of amenities offered in Panama City Beach.

Considering this visit, please rate each amenity on a 5 point scale (1 is poor, 3 is average and 5 is excellent).

	Winter n=188	Spring n=466	Summer n=632	Fall n=281
Quality of beaches	4.69	4.72	4.67	4.74
Range of choices for dining out	4.36	4.48	4.49	4.53
Quality of your accommodations	4.35	4.4	4.39	4.38
Quality of dining out	4.3	4.39	4.38	4.47
Variety of shopping & merchandise	4.25	4.34	4.36	4.32
Lodging value you received for the price paid	4.2	4.21	4.08	4.19
Overall appeal of the attractions in the area	4.17	4.37	4.48	4.47
Attractiveness/landscaping of the destination	4.15	4.34	4.47	4.41
Ease of finding visitor information	4.08	4.23	4.24	4.23
Level of service / employee training	3.98	4.22	4.13	4.17
Signage and wayfinding	3.94	4.12	4.16	4.15
Variety of children's activities	3.86	4.05	4.26	4.25
Night life	3.81	3.94	3.94	4.14
Ease of traffic	3.37	3.34	3.21	3.67



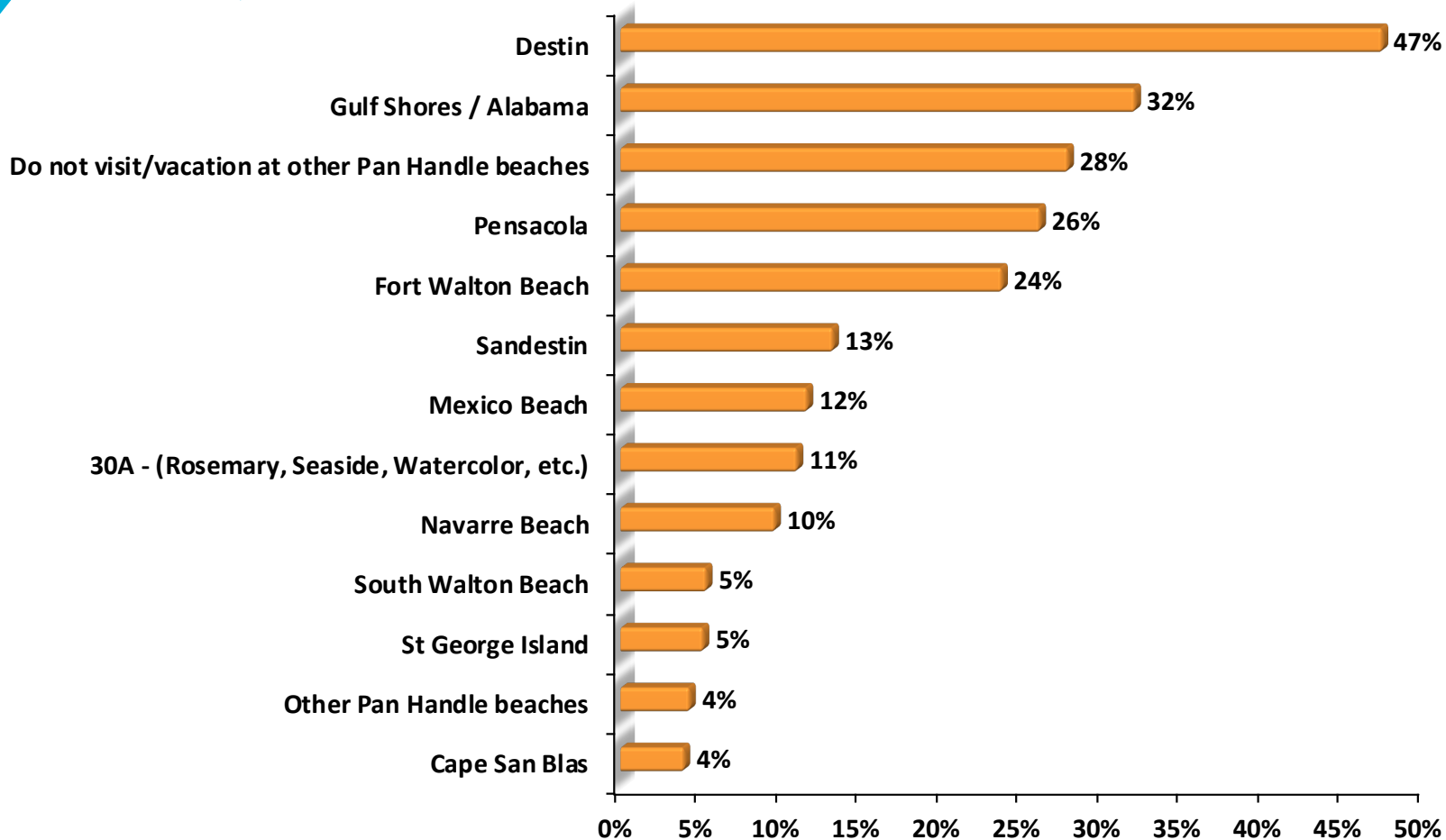


OTHER BEACHES

-13-

Please indicate the other Panhandle beaches where you have taken vacations or getaways.

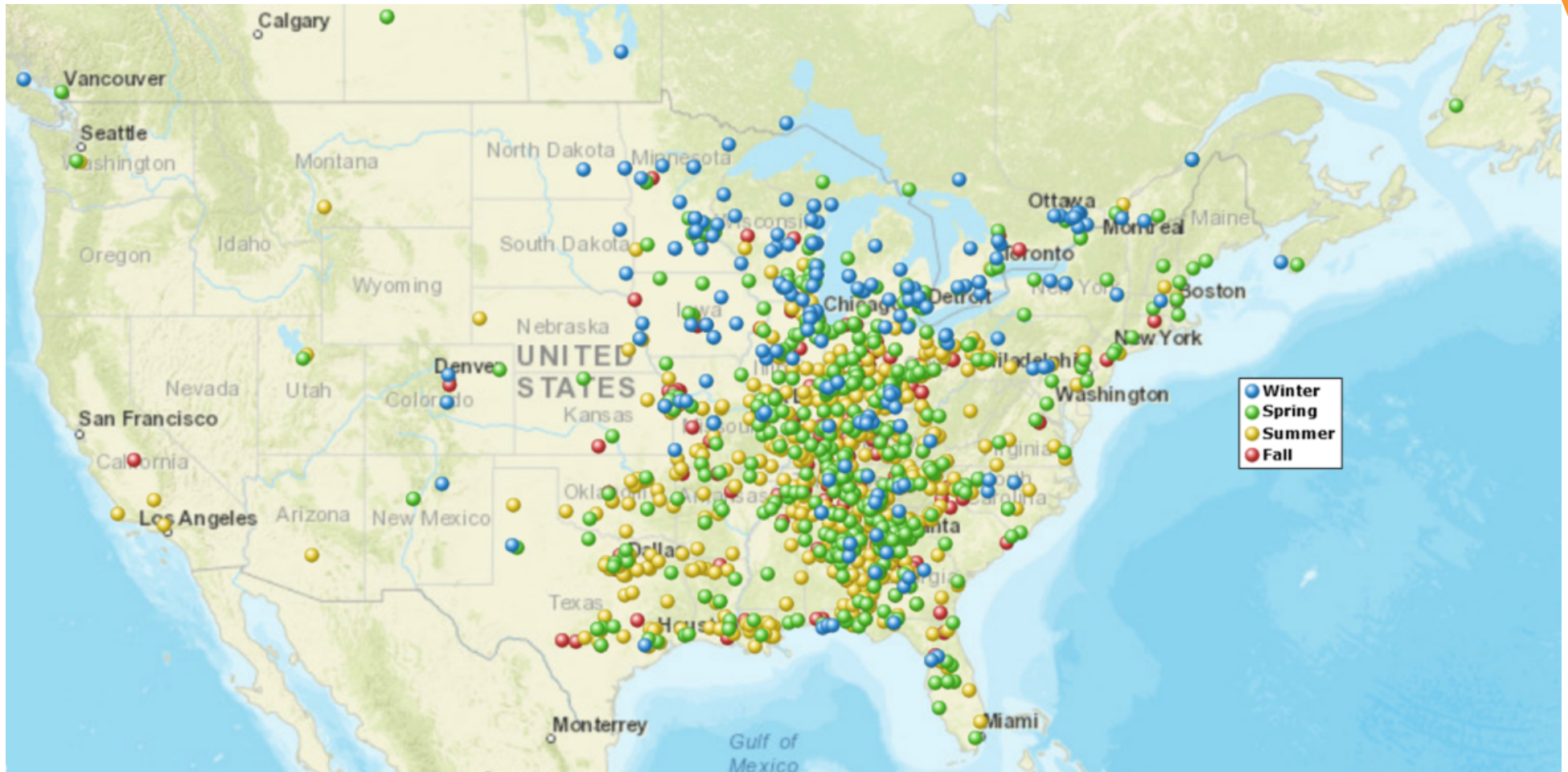
n=1,438





POINT OF ORIGIN – ALL LEISURE

-14-





DEMOGRAPHICS – WINTER - DECEMBER, 2018 – FEBRUARY, 2019

-15-

Household Income

- \$0 - \$49,000 – 20.9%
- **\$50,000 - \$99,000 – 51.5%**
- \$100,000 - \$149,000 – 17.9%
- \$150,000 - \$199,000 – 8.2%
- \$200,000 - \$249,000 – 0.8%
- \$250,000+ - 0.8%

Average age of respondents is years old 62.8

- Teens- 0%
- Twenties- 0.5%
- Thirties- 2.7%
- Forties- 6.0%
- Fifties- 15.3%
- **Sixties- 49.8%**
- **Seventies- 25.7%**
- Eighties- 0.5%

Gender of survey respondents :

- Male – 39.8%
- Female - 60.2%

Top 5 Occupations

- **Retired- 70.3%**
- Self-Employed- 4.7%
- Other- 4.3%
- Professional/Technical- 3.9%
- Government/military- 2.7%

Ethnicity-

- **White/Caucasian- 96.8%**
- Prefer not to answer- 3.2%
- Black or African American- 0.5%

Rate PCB overall at 4.44 (compared to 4.5 in 2018)

- 1 (poor)- 0.0%, 2- 0.5%, 3 (average)- 9.6%, 4- 35.1%, 5 (excellent)- 54.8%

87.0% are planning a future visit to PCB while 10.8% say they have no plans of visiting right now.

N=186





DEMOGRAPHICS – SPRING – MARCH – MAY, 2019

-16-

Household Income

- \$0 - \$49,000 – 19.0%
- **\$50,000 - \$99,000 – 44.0%**
- \$100,000 - \$149,000 – 22.9%
- \$150,000 - \$199,000 – 9.6%
- \$200,000 - \$249,000 – 2.3%
- \$250,000+ - 2.1%

Average age of respondents is years old 53.6

- Teens- 0.2%
- Twenties- 3.1%
- Thirties- 11.8%
- **Forties- 22.9%**
- **Fifties- 29.3%**
- **Sixties- 27.1%**
- Seventies- 5.2%
- Eighties- 0.4%

Gender of respondents :

- Male – 28.9%
- Female - 71.2%

Top 5 Occupations

- Retired- 23.8%
- Healthcare industry- 16.3%
- Professional/Technical- 8.4%
- Other- 7.2%
- Secretary/clerk/office- 6.8%
- Education- professor/teacher- 6.8%

Ethnicity:

- White/Caucasian- 89.7%
- Black or African American- 5.0%
- Prefer not to answer- 3.7%
- American Indian or Alaskan Native- 1.1
- Hispanic or Latino- 1.1%
- Asian or Pacific Islander- 0.8%

Rate PCB overall at 4.53 (compared to 4.7 in 2018)

- 1 (poor)- 0.2%, 2- 1.1%, 3 (average)- 7.5%, 4- 28.2%, 5 (excellent)- 63.0%

83.8% are planning a future visit to PCB while 15.6% say they have no plans of visiting right now.

N=461





DEMOGRAPHICS – SUMMER – JUNE – AUGUST, 2019

-17-

Household Income

- \$0 - \$49,000 – 23.5%
- **\$50,000 - \$99,000 – 41.4%**
- \$100,000 - \$149,000 – 22.9%
- \$150,000 - \$199,000 – 8.8%
- \$200,000 - \$249,000 – 1.7%
- \$250,000+ - 1.7%

Average age of respondents is years old – 49.5

- Teens- 0.2%
- Twenties- 4.3%
- Thirties- 18.3%
- **Forties- 27.7%**
- **Fifties- 26.0%**
- Sixties- 20.4%
- Seventies- 2.9%
- Eighties- 0.3%

Gender of respondents:

- Male – 29.0%
- Female - 71.0%

Top 5 Occupations

- Retired- 17.2%
- Healthcare industry- 13.1%
- Other- 9.2%
- Secretary/clerk/office- 7.6%
- Self-employed- 6.8%

Ethnicity:

- White/Caucasian- 89.4%
- Black or African American- 5.3%
- Prefer not to answer- 3.5%
- Hispanic or Latino- 2.7%
- American Indian or Alaskan Native- 1.3%
- Asian or Pacific Islander- 0.3%

Rate PCB overall at 4.64 (compared to 4.7 in 2018)

•1 (poor)- 0.2%, 2- 0.9%, 3 (average)- 5.4%, 4- 21.9%, 5 (excellent)- 71.7%

90.0% are planning a future visit to PCB while 9.9% say they have no plans of visiting right now.

N=628





DEMOGRAPHICS – FALL – September – November, 2019

-18-

Household Income

- \$0 - \$49,000 – 23.3%
- **\$50,000 - \$99,000 – 45.3%**
- \$100,000 - \$149,000 – 20.6%
- \$150,000 - \$199,000 – 5.8%
- \$200,000 - \$249,000 – 1.8%
- \$250,000+ - 3.1%

Average age of respondents is years old – 55.7

- Teens- 0.0%
- Twenties- 1.8%
- Thirties- 6.8%
- Forties- 16.5%
- **Fifties- 30.6%**
- **Sixties- 37.4%**
- Seventies- 6.5%
- Eighties- 0.0%
- Nineties- 0.4%

Gender of respondents :

- Male – 35.3%
- Female - 64.8%

Top 5 Occupations

- Retired- 26.6%
- Healthcare industry- 12.4%
- Other- 9.5%
- Self-employed- 9.5%
- Professional/Technical- 5.8%

Ethnicity:

- White/Caucasian- 92.8%
- Prefer not to answer- 4.0%
- Black or African American- 2.2%
- Hispanic or Latino- 1.1%
- American Indian or Alaskan Native- 1.1%
- Asian or Pacific Islander- 0.7%

Rate PCB overall at 4.59 (compared to 4.7 in 2018)

•1 (poor)- 0.7%, 2- 1.4%, 3 (average)- 7.5%, 4- 18.8%, 5 (excellent)- 71.6%

91.4% are planning a future visit to PCB while 8.3% say they have no plans of visiting right now.

N=278





DID NOT VISIT

-19-

Over the last 2 years, have you taken vacation/getaways to other destinations rather than Panama City Beach? If yes, please tell us where.





FESTIVALS RESEARCH



Seabreeze JAZZ Festival

THE ULTIMATE WEEKEND OF SMOOTH JAZZ ~ 1998-2018

2018

SEABREEZE JAZZ FESTIVAL

APRIL 18-22

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.

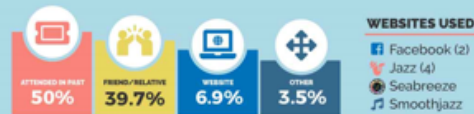
N=120

SUMMARY



QUESTION:

HOW DID YOU FIND OUT THIS FESTIVAL?

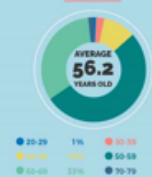


QUESTION:

NUMBER OF NIGHTS STAYED DURING VISIT:



AGE



GENDER

53% 47%

ETHNICITY



GEOGRAPHY

POINT OF ORIGIN

Respondents came from 33 states with the largest portion of respondents from Florida (12%), followed by Georgia and then Alabama and Louisiana.



QUESTION:

HOW FAR IN ADVANCED DID YOU PLAN TO ATTEND THIS FESTIVAL/ EVENT?



QUESTION:

HOW CAN WE IMPROVE YOUR EXPERIENCE TO THIS FESTIVAL?



QUESTION:

HOW MANY TIMES DID YOU OR YOUR GROUP ATTEND THE FESTIVAL?



QUESTION:

PLEASE SELECT THE PHASE BELOW THAT BEST DESCRIBES YOUR TIME SPENT IN PCR

2018 VS 2017



QUESTION:

WAS ATTENDING THIS FESTIVAL YOUR PRIMARY PURPOSE FOR VISITING PCR?



OVERALL, RATE THIS FESTIVAL



OVERALL, RATE THIS FESTIVAL





2020 NEW RESEARCH METHODOLOGY

-21-

Implementation is underway of new methodology to produce quarterly reports.

Season	Months	Report
Winter	Dec - Feb	May - 2020
Spring	Mar - May	August - 2020
Summer	Jun - Aug	Nov - 2020
Fall	Aug - Nov	Feb - 2021

Visitor profile

Economic impact of visitation

Visitor surveys deployed quarterly

Partnership with KEYDATA to deploy surveys





**Berkeley Young, President
Young Strategies, Inc**

**byoung@youngstrategies.com
704-677-4018**

**[facebook/young strategies](https://www.facebook.com/youngstrategies)
[LinkedIn/berkeleyyoung](https://www.linkedin.com/company/berkeleyyoung)**



-22-

