Panama City Beach, Florida 2018 Market Research

Prepared for:

- Panama City Beach Convention and Visitors Bureau

Panama City Beach®
FLORIDA

Study Conducted: December, 2017 – October, 2018
Final Report Submitted – May, 2019

Young Strategies, Inc.
Charlotte, NC

Panama City Beach Travel Market Research

RESEARCH OBJECTIVE:

To provide a research-based market study for Panama City Beach, FL that:

- Determines specific behavior and spending patterns throughout the year
- Provide detailed analysis of travel party behavior/spending by area within the Panama City Beach destination
- Develop research based strategies and future visitor profile targets

Purpose

To document the profile and planning preferences of those who visited Panama City Beach, Florida in Winter, 2017 or Spring/Summer/Fall, 2018 and compare their responses to survey data collected in 2013, 2014, 2015, 2016, and 2017. The survey data in this report covers the period December, 2017 through November, 2018. 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 seven-year period 2011 – 2018, to capture visitor perceptions of PCB. The Panama City Beach CVB database of visitor email addresses was used to collect online visitor surveys. Email recipients were invited to take a visitor survey and be entered into a chance to win one of six $200 Visa gift cards.

The number of surveys completed by respondents who identified themselves as leisure visitors to Panama City Beach in Winter, 2017 or Spring/Summer/Fall, 2018 totaled 1,859. 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 – 2018 is shown below.

Season	2013	2014	2015	2016	2017	2018
Winter (Dec – Feb)	400	195	183	306	354	304
Spring (Mar – May)	564	441	406	470	400	380
Summer (Jun - Aug)	761	1,236	986	850	765	718
Fall (Sep – Oct. 8)	195	449	354	367	540	457
Total Season Responses	**1,920**	**2,321**	**1,929**	**1,993**	**2,059**	**1,859**

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Panama City Beach, Florida Leisure Visitors Seasonal Profiles

The visitor profile data in this report covers the period of December 1, 2017 – October 8, 2018. The four seasons within that year are:

Winter: Dec.'17 – Feb. '18
Spring: Mar.'18 – May '18
Summer: Jun. '18 – Aug. '18
Fall: Sep. '18 – Oct. 8, '18

Note: Hurricane Michael made landfall in Mexico Beach, FL on October 10, 2018. The visitor survey for this research had been deployed just prior to the hurricane and thus many surveys were received from visitors who visited Panama City Beach September 1 – October 8th. The survey was suspended on October 9, 2018. Visitor behavior to Panama City Beach was on a typical pace until October 8th when the evacuations began in earnest.

All spending and travel behavior patterns were disrupted by Hurricane Michael and this report provides no data for the period following October 8, 2018. Any references to Fall 2018 relate to the five weeks prior to the hurricane.

WINTER Visitor Profile Summary
December, 2017 – February, 2018

- **Household Income**
  - $0 - $49,000 - 17.1%
  - $50,000 - $99,000 - 55.2%
  - $100,000 - $149,000 - 20.5%
  - $150,000 - $199,000 - 3.8%
  - $200,000 - $249,000 - 1.0%
  - $250,000+ - 2.4%
- **Average age of respondents is 64.8 years old**
- **Gender of respondents :**
  - Male – 43.8%
  - Female - 56.2%
- **Length of Stay:**
  - Winter short-term – 5.7 nights (compared to 6.2 nights in 2017)
  - Winter long-term – 62.9 nights (compared to 67 nights in 2017)
- **Accommodations:**
  - Vacation condo/townhouse rental – 63.6%
  - Hotel/Motel – 16.2%

Average Party Spending –

Winter short-term - $1,238.17 (compared to $1,401 in 2017)

Winter long-term - $5,398.60 (compared to $5,988 in 2017)

- **Rate PCB overall at 4.50** (compared to 4.56 in 2017)

n = 304

SPRING Visitor Profile Summary
March – May, 2018

- **Household Income**
  - $0 - $49,000 - 19.0%
  - $50,000 - $99,000 - 45.7%
  - $100,000 - $149,000 - 22.5%
  - $150,000 - $199,000 - 6.9%
  - $200,000 - $249,000 - 3.5%
  - $250,000+ - 2.4%
- **Average age of respondents is 53.8 years old**
- **Gender of respondents :**
  - 36.9% - Male
  - 63.1% - Female
- **Length of Stay – 5.6 nights** (compared to 5.5 nights in 2017)
- **Accommodations:**
  - Vacation condo/townhouse rental – 47.4%
  - Hotel/Motel – 30.4%
- **Average Party Spending –** $2,448.67 (compared to $2,025.44 in 2017)
- **Rate PCB overall at 4.67** (compared to 4.52 in 2017)

n = 380

Panama City Beach Convention & Visitors Bureau
2018 Visitor Profile

SUMMER Visitor Profile Summary
June – August, 2018

- **Household Income**
  - $0 - $49,000 - 21.1%
  - $50,000 - $99,000 - 42.2%
  - $100,000 - $149,000 - 25.0%
  - $150,000 - $199,000 - 9.2%
  - $200,000 - $249,000 - 1.4%
  - $250,000+ - 1.1%
- **Average age of respondents is 49.7 years old**
- **Gender of respondents :**
  - 27.6% - Male
  - 72.4% - Female
- **Length of Stay – 5.9 nights** (compared to 5.8 nights in 2017)
- **Accommodations:**
  - Vacation condo/townhouse rental – 53.7%
  - Hotel/Motel – 24.3%
- **Average Party Spending –** $2,816.65 (compared to $2,673.33 in 2017)
- **Rate PCB overall at 4.67** (compared to 4.56 in 2017)

n = 718

FALL Visitor Profile Summary
September 1– October 8, 2018

- **Household Income**
  - $0 - $49,000 - 19.1%
  - $50,000 - $99,000 - 40.5%
  - $100,000 - $149,000 - 27.1%
  - $150,000 - $199,000 - 8.6%
  - $200,000 - $249,000 - 2.3%
  - $250,000+ - 2.6%
- **Average age of respondents is 54.3 years old**
- **Gender of respondents :**
  - 27.4% - Male
  - 72.6% - Female
- **Length of Stay – 5.6 nights** (compared to 5.4 nights in 2017)
- **Accommodations:**
  - Vacation condo/townhouse rental – 48.2%
  - Hotel/Motel – 26.7%
- **Average Party Spending –** $1,949.00 (compared to $1,836.45 in 2017)
- **Rate PCB overall at 4.68** (compared to 4.67 in 2017)

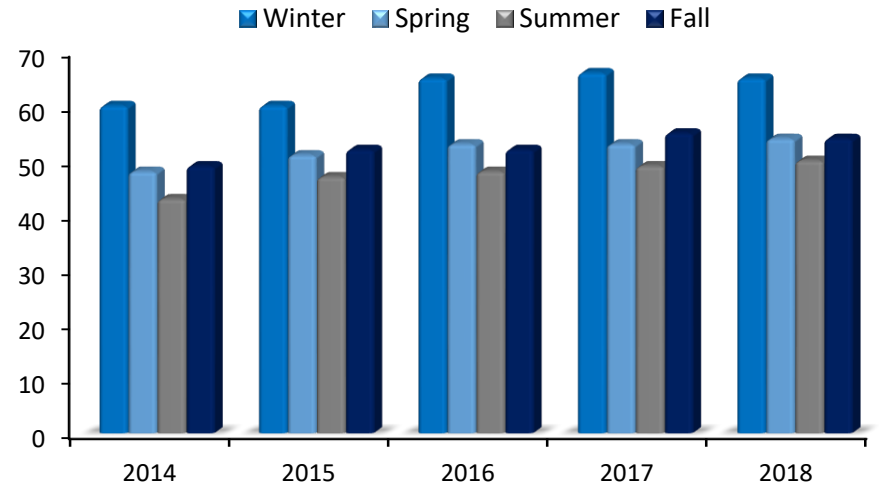
n = 457

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Visitor Demographics

Average Age of Respondents – 5-YR Comparative by Season

Winter n=281; Spring n=351; Summer n=664; Fall n=429

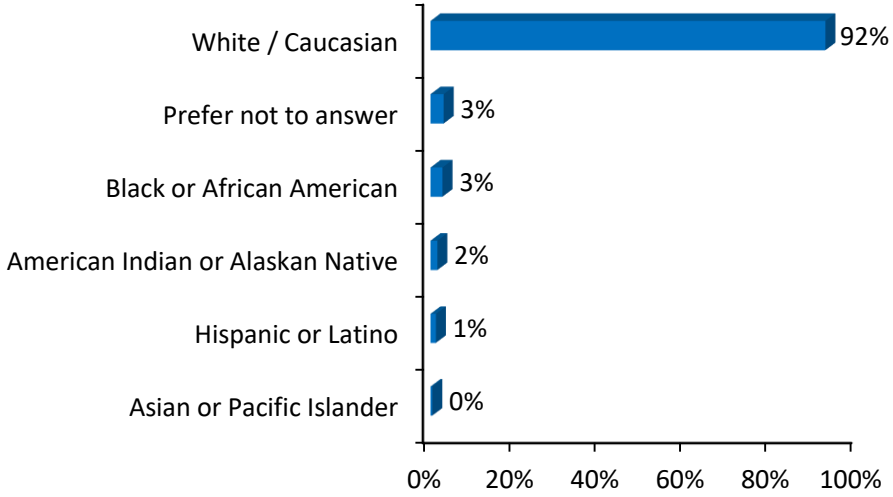


Observations:

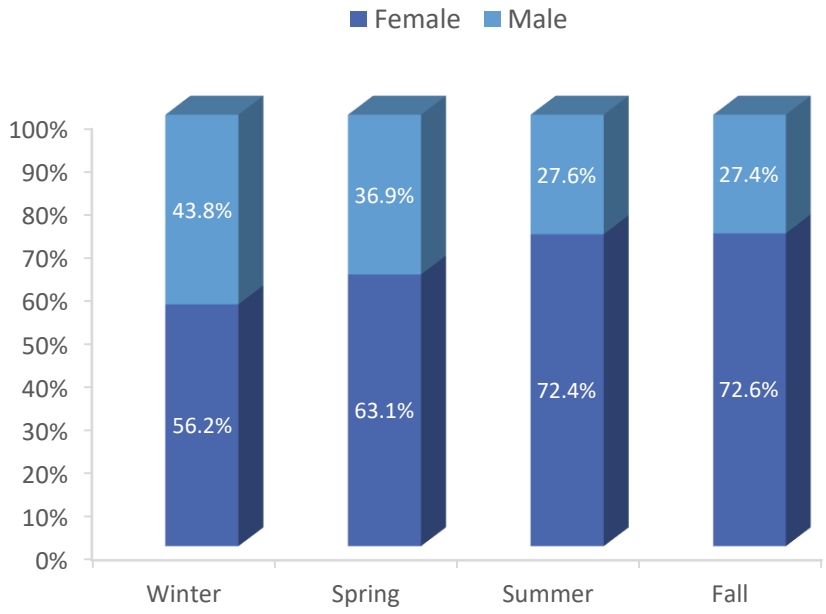
- Age and gender of survey respondents is reflective of the typical travel planner for each season.
- Female head of household is most often the primary travel planner which is also typical of most leisure travel research.
- Men are more involved in winter travel planning which is reflective of the higher age and increased incidence of retirement among winter visitors.
- Typical age of survey respondents 2014 - 2018 has increased slightly in every season.
- Summer season continues to have the youngest age.

Overall Ethnicity – 2018 Respondents

n=1,758



Gender of Respondents – 2018 by Season



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Visitor Demographics – Continued

Occupation – 2018
n=1,634

Occupation	Responses
Retired	33.7%
Healthcare industry	11.7%
Professional/technical	6.9%
Secretary/clerk/office	6.2%
Executive/manager	5.5%
Education - professor/teacher	4.7%
Government/military	4.5%
Homemaker/stay at home parent	4.4%
Self-employed	4.0%
Banking/financial	3.9%
Sales/buyer	3.7%
Craft/mechanical/factory	2.5%
Human Resources	1.8%
Hospitality/tourism	1.6%
Unemployed	1.5%
Attorney/legal	1.3%
Real Estate	1.0%
Arts/entertainment	0.4%
Student	0.4%
Religious/clergy	0.3%

Travel Information and Planning

Please select any of the following that influence or inspire your selection of a destination when planning any overnight leisure trip.
n=1,887

	Winter n=303	Spring n=377	Summer n=712	Fall n=452
Friends / family recommendation	**70.6%**	**68.4%**	**73.5%**	**72.1%**
Destination website	**54.1%**	**54.9%**	**56.7%**	**56.6%**
State / regional travel guide	**46.2%**	**43.5%**	**40.7%**	**40.5%**
Festival / event taking place	36.6%	36.3%	30.9%	39.8%
Last minute online travel offer / discounted lodging	35.6%	37.4%	39.0%	40.0%
TripAdvisor	34.3%	34.5%	33.0%	29.0%
Magazine / newspaper story or ad	30.0%	24.4%	22.6%	26.1%
Travel package - all inclusive	29.4%	31.8%	36.2%	29.4%
Social media	19.5%	18.8%	29.5%	25.9%
TV advertisement	10.2%	10.6%	11.0%	10.2%
Other (please specify)	7.3%	7.2%	7.4%	7.5%
Local radio	3.3%	4.0%	4.5%	4.0%
Blogs	2.3%	5.8%	4.4%	3.3%
Billboard	2.0%	3.5%	3.1%	2.7%

Observations: All segments reported friend/family recommendations, destination website and the state/regional travel guide as the top three main sources of information they use for travel planning. This data confirms the PCBCVB website is an important driver of both new and repeat visitation to Panama City Beach.

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Travel Information and Planning

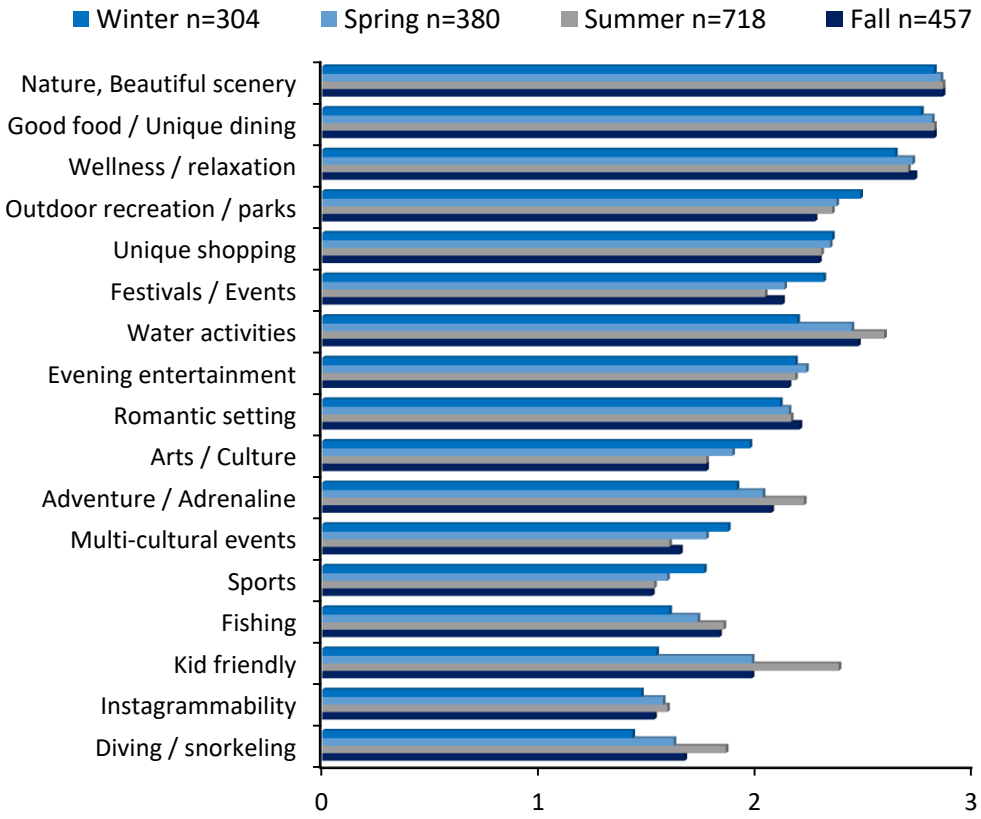
Please tell us the level of importance for each of the following attributes when selecting a getaway / vacation destination? Please use the scale provided below where 3 is always, 2 is sometimes and 1 is never.

n=1,634

	Always	Sometimes	Never	Weighted Average
Nature, Beautiful scenery	85.5%	14.0%	0.5%	**2.85**
Good food / Unique dining	82.1%	16.5%	1.4%	**2.81**
Wellness / relaxation	73.2%	24.4%	2.5%	**2.71**
Water activities	51.6%	43.9%	4.6%	**2.47**
Outdoor recreation / parks	41.8%	52.0%	6.2%	**2.36**
Unique shopping	40.0%	52.2%	7.8%	**2.32**
Evening entertainment	27.7%	63.3%	9.1%	**2.19**
Romantic setting	27.1%	62.1%	10.7%	**2.16**
Festivals / Events	21.9%	68.8%	9.3%	**2.13**
Adventure / Adrenaline	23.6%	62.4%	14.0%	**2.1**
Kid friendly	34.4%	37.7%	27.9%	**2.07**
Arts / Culture	7.5%	67.7%	24.8%	**1.83**
Fishing	15.0%	48.4%	36.6%	**1.78**
Multi-cultural events	6.3%	56.9%	36.8%	**1.7**
Diving / snorkeling	13.2%	43.3%	43.6%	**1.7**
Sports	6.0%	46.4%	47.6%	**1.58**
Instagrammability	10.9%	34.1%	55.0%	**1.56**

Observations:

- All segments reported natural, beautiful scenery followed by good food/unique dining and wellness/relaxation as the most important attributes when selecting a getaway / vacation destination. This data confirms that Panama City Beach has what travelers are looking for when making their vacation decisions for a beach destination.



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Travel Information and Planning

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

	Winter n=302	Spring n=376	Summer n=712	Fall n=455
Destination website or digital travel guide	**51.7%**	**48.9%**	46.6%	**48.8%**
VRBO, Airbnb. HomeAway, etc.	**49.7%**	46.3%	**53.4%**	42.0%
TripAdvisor, Orbitz, Expedia, Kayak, etc.	**49.3%**	**53.2%**	**50.6%**	**46.8%**
Google / Bing search	48.3%	**50.8%**	**51.0%**	**50.1%**
State website or travel guide	45.7%	45.7%	40.6%	41.5%
Hotel website	30.8%	37.2%	40.5%	39.1%
Travel Agent	12.6%	5.6%	4.8%	3.5%
Airline website	11.6%	10.6%	7.2%	10.1%

Observations:

- This data again confirms the Panama City Beach CVB website and digital travel guide is a preferred online source for vacation planning for many visitors to PCB. Online travel agencies (OTA's), homeowner rental sites (VRBO/HomeAway/Airbnb) and online booking sites such as TripAdvisor, Orbitz, Expedia, Kayak are also frequently used by visitors to Panama City Beach as planning resources.

While in Panama City Beach, did you or anyone in your travel party use a travel planning app on a smart phone to locate activities, dining, shopping, etc. in the destination?

	Winter n=245	Spring n=336	Summer n=649	Fall n=404
Map/directions (GPS, Google maps, Waze, etc.)	**75.1%**	**77.7%**	**73.0%**	**77.2%**
Attractions information	**55.9%**	**59.5%**	**63.9%**	**59.7%**
Activities information	**55.5%**	**46.4%**	**49.6%**	**47.3%**
Dining reservations - OpenTable	38.0%	32.1%	29.9%	31.7%
Hotel / accommodation search (Airbnb, VRBO, HomeAway, Couchsurfing, etc.)	34.7%	39.0%	41.9%	33.4%
TripAdvisor	27.8%	28.9%	28.4%	23.5%
Beach/surf information	24.9%	42.3%	49.2%	48.3%
Yelp	10.6%	14.6%	13.6%	13.6%
Please list any specific travel planning apps used while in PCB:	7.8%	4.8%	5.1%	6.2%
Food delivery - (Ubereats, Grubhub, etc.)	4.9%	10.1%	9.2%	12.6%
Shared riding - (Uber, Lyft, etc.)	2.5%	6.9%	5.7%	5.7%

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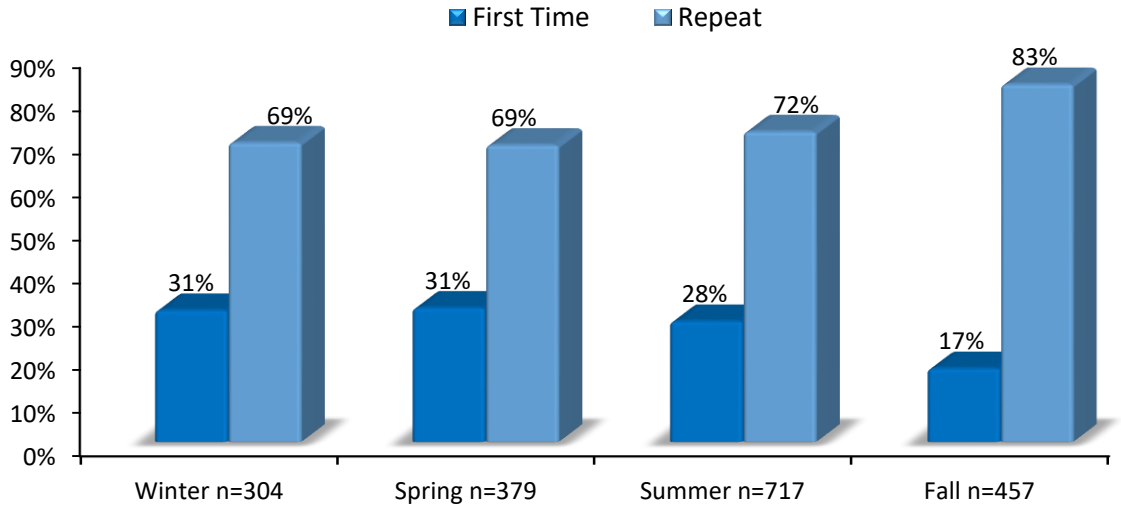
Travel Behavior Characteristics

Observations:
Nearly one-third of the leisure respondents in winter and spring indicate this was their first time visiting Panama City Beach, with the summer and fall also having a solid number of first-time visitors. This is a strong indicator that the PCBCVB program of work is bringing new visitors to the Panama City Beach market. Repeat visitation was most prevalent with the fall and summer visitors.

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



# of years visiting PCB	Winter n=211	Spring n=262	Summer n=517	Fall n=379
2	**12.8%**	**12.2%**	**13.4%**	9.0%
3	**14.2%**	**11.1%**	8.9%	6.3%
4	**11.4%**	7.6%	5.6%	5.5%
5	9.0%	9.9%	7.5%	7.9%
6	6.2%	3.4%	4.1%	4.2%
7	4.7%	1.2%	1.9%	3.2%
8	2.8%	2.3%	2.5%	1.9%
9	2.4%	1.2%	1.2%	2.1%
10	**10.4%**	3.8%	6.8%	7.7%
11	2.4%	1.9%	1.6%	0.5%
12	3.3%	3.4%	0.6%	2.1%
13	2.8%	0.0%	0.2%	1.1%
14	0.5%	0.8%	0.8%	0.3%
15	1.4%	1.9%	3.5%	2.9%
16	0.5%	0.4%	0.8%	0.5%
17	0.5%	0.4%	0.8%	0.0%
18	1.4%	1.2%	0.6%	0.5%
19	0.5%	1.5%	0.8%	0.0%
20+	**12.8%**	**35.9%**	**38.7%**	**44.3%**

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	12	14	15	17	18	20+
Winter n=211	**23.2%**	**61.6%**	5.2%	2.8%	1.0%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.0%	0.0%	0.0%	2.8%
Spring n=262	**25.2%**	**58.8%**	8.8%	3.1%	2.7%	0.4%	0.4%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%
Summer n=517	**23.6%**	**56.7%**	9.1%	5.6%	1.7%	1.2%	0.2%	0.2%	0.0%	0.4%	0.0%	0.0%	0.2%	0.0%	0.2%	1.0%
Fall n=379	**19.8%**	**53.0%**	**11.6%**	2.9%	1.1%	2.6%	0.8%	2.1%	1.1%	1.1%	0.8%	0.8%	0.8%	0.0%	0.0%	1.6%

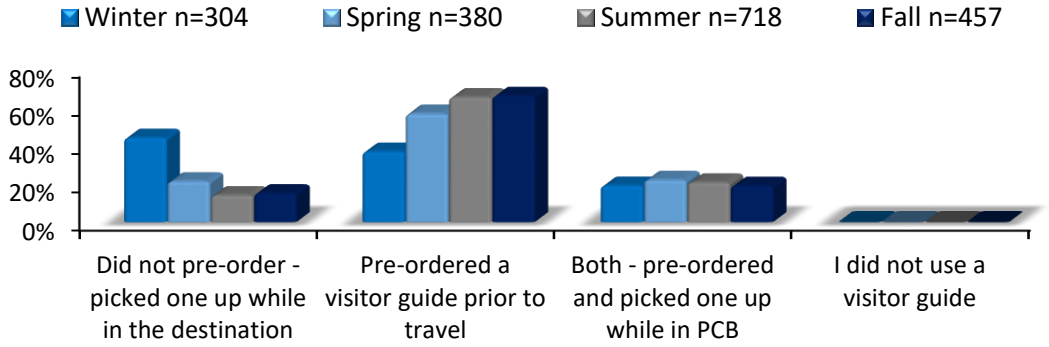
Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

PCB Visitor Guide

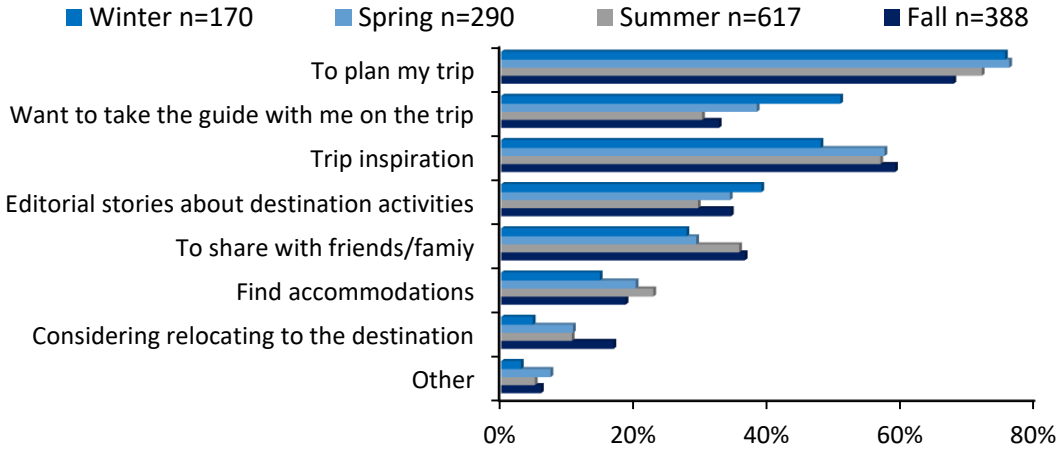
Observations:

- Ratings averages of PCB visitor guide – Winter 4.48, Spring 4.54, Summer 4.51, Fall 4.55 on a 5-pt. scale where 5 is very satisfied, 3 is neutral and 1 is very dissatisfied. These scores indicate a high level of satisfaction with the PCBCVB visitor guide.

Please tell us if prior to travel you pre-ordered an official Panama City Beach visitor guide and/or picked one up while in Panama City Beach?



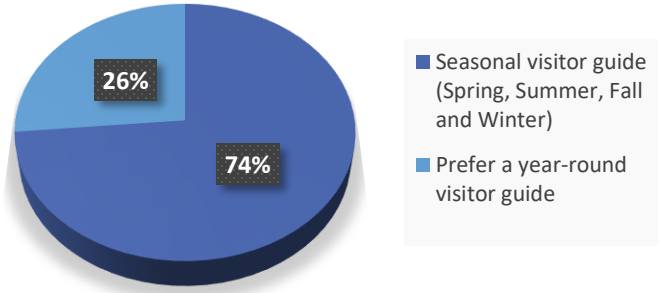
Please tell us the reasons for pre-ordering a Panama City Beach visitor guide?



What information were you specifically looking for in the Panama City Beach visitor guide?

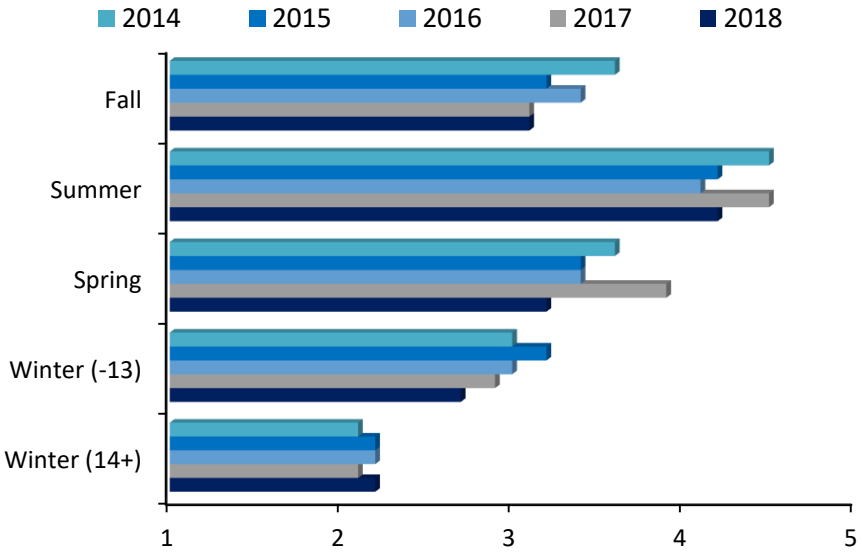
	Winter n=303	Spring n=379	Summer n=714	Fall n=456
Dining options - find a good local restaurant	**82.8%**	**82.6%**	**79.4%**	**79.4%**
Attractions in the destination - find things to do	**80.2%**	**80.5%**	**77.3%**	**75.9%**
Discount coupons	**76.9%**	**68.6%**	**71.7%**	**66.0%**
Events to attend	63.7%	46.4%	33.6%	46.1%
Entertainment options	54.1%	48.8%	47.1%	45.4%
Shopping options	49.8%	44.1%	43.1%	44.7%
Maps & wayfinding	49.8%	43.3%	36.4%	35.5%
Travel tips	29.7%	29.3%	28.3%	26.1%
Advertisements	29.0%	25.1%	23.0%	28.1%
Outdoor recreation	29.0%	30.1%	35.2%	27.9%
Arts / cultural	22.4%	12.7%	8.4%	10.8%
Tours / packages	20.5%	22.4%	22.0%	17.3%
Accommodations - Vacation rental / timeshare	19.8%	19.5%	21.7%	20.0%
Hours of operation	17.5%	15.0%	15.8%	16.2%
Accommodations - Hotel / motel	13.9%	24.3%	29.3%	24.3%
Health / wellness / fitness / spas	11.6%	6.3%	2.9%	4.0%
Children's activities	6.3%	18.7%	31.2%	17.8%
Itineraries	5.9%	7.4%	5.6%	6.6%
Pet information	4.6%	6.3%	5.9%	9.0%
Beach equipment rentals	3.0%	13.2%	23.4%	16.0%
Accommodations - Camping /RV options	2.3%	5.3%	7.6%	4.8%
Other:	2.3%	1.6%	1.5%	4.0%

Please tell us if you like receiving seasonal information or would prefer a year-round visitor guide. n=1,878



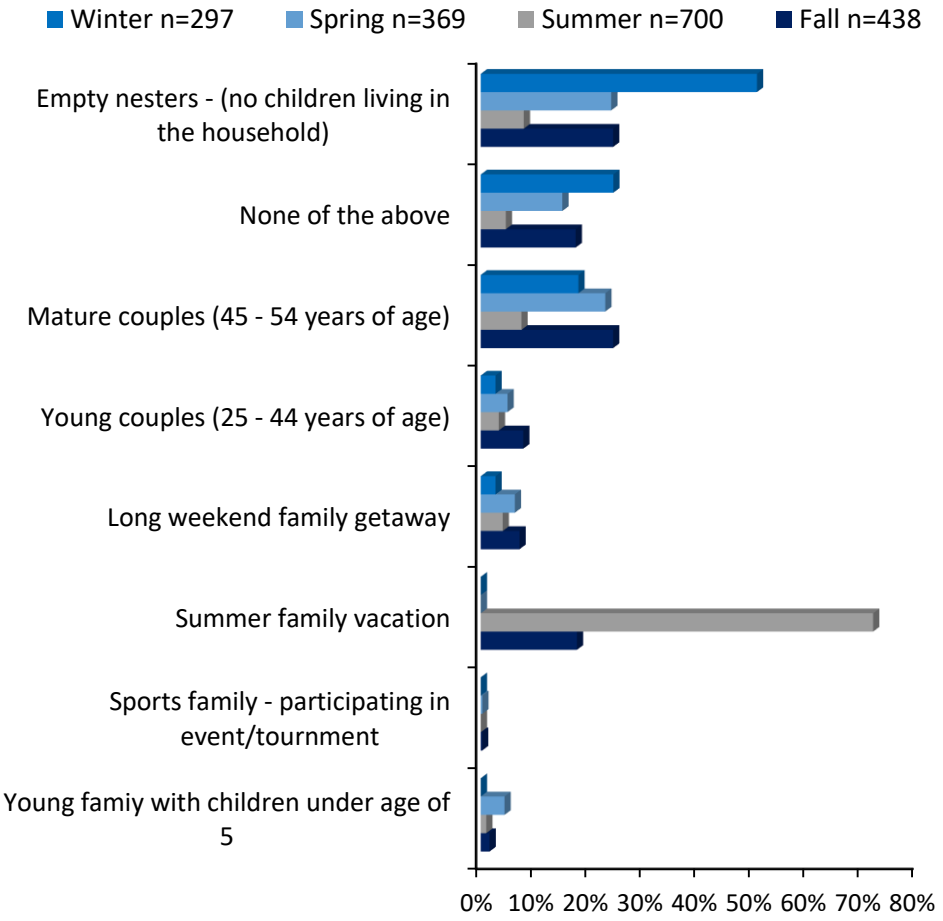
Travel Party

What was the total number of people in your travel party?



Response Category	Winter 14+ n=192	Winter -13 n=91	Spring n=346	Summer n=609	Fall n=417
2018	2.2	2.7	3.2	4.2	3.1
2017	2.1	2.9	3.9	4.5	3.1
2016	2.2	3.0	3.4	4.1	3.4
2015	2.2	3.2	3.4	4.2	3.2
2014	2.1	3.0	3.6	4.5	3.6

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



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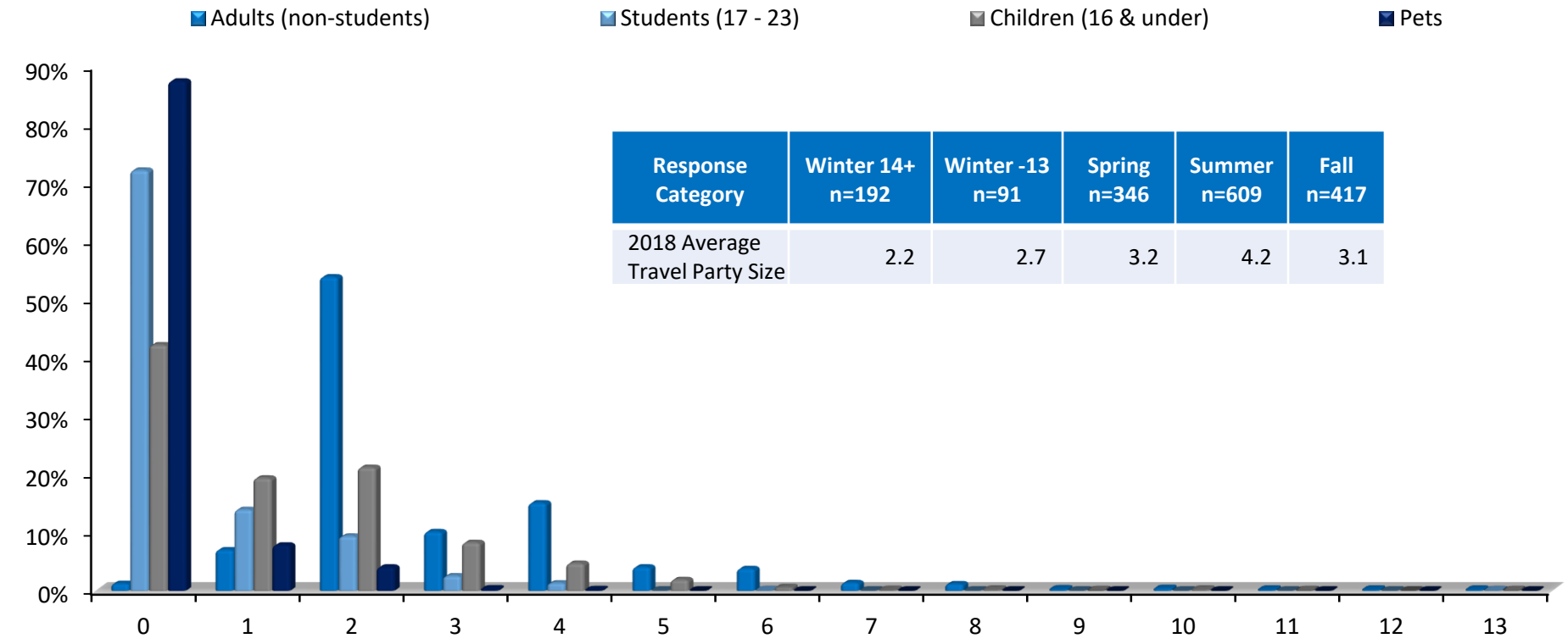
Travel Planning Characteristics

How many people shared your accommodations?

n=1,846



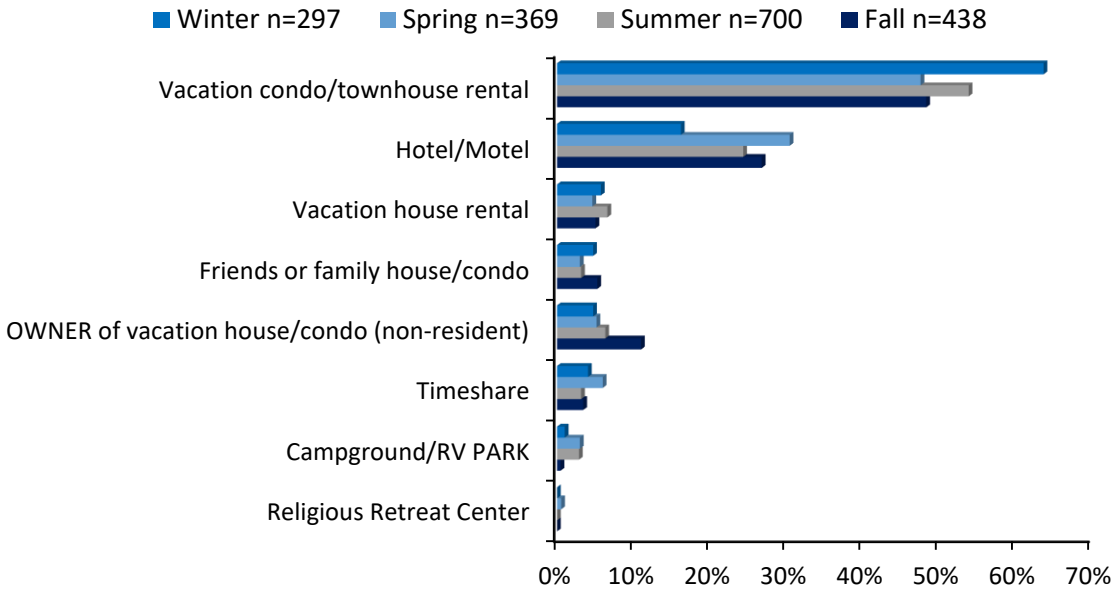
Response Category	Winter 14+ n=192	Winter -13 n=91	Spring n=346	Summer n=609	Fall n=417
2018 Average Travel Party Size	2.2	2.7	3.2	4.2	3.1

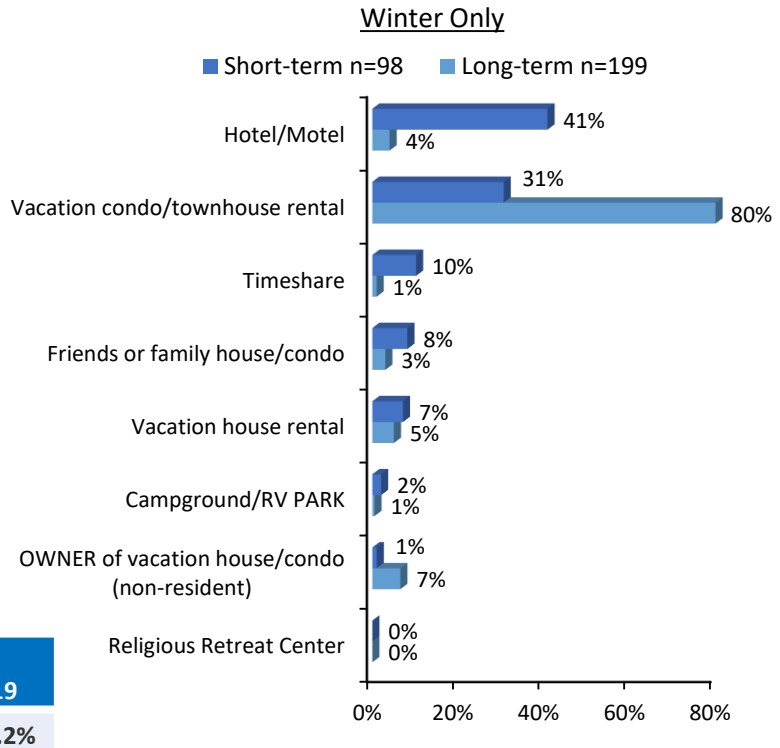
	0	1	2	3	4	5	6	7	8	9	10	11	12	13	Averages
Adults (non-students)	1.3%	7.1%	**54.0%**	10.3%	15.2%	4.1%	3.9%	1.4%	1.2%	0.3%	0.4%	0.3%	0.3%	0.3%	**2.84**
Students (17 - 23)	**72.3%**	14.1%	9.5%	2.6%	1.4%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	**0.47**
Children (16 & under)	**42.4%**	**19.6%**	**21.4%**	8.4%	4.8%	1.9%	0.6%	0.2%	0.3%	0.1%	0.3%	0.1%	0.0%	0.1%	**1.28**
Pets	**87.5%**	7.9%	4.1%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.18**

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Travel Planning Characteristics

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





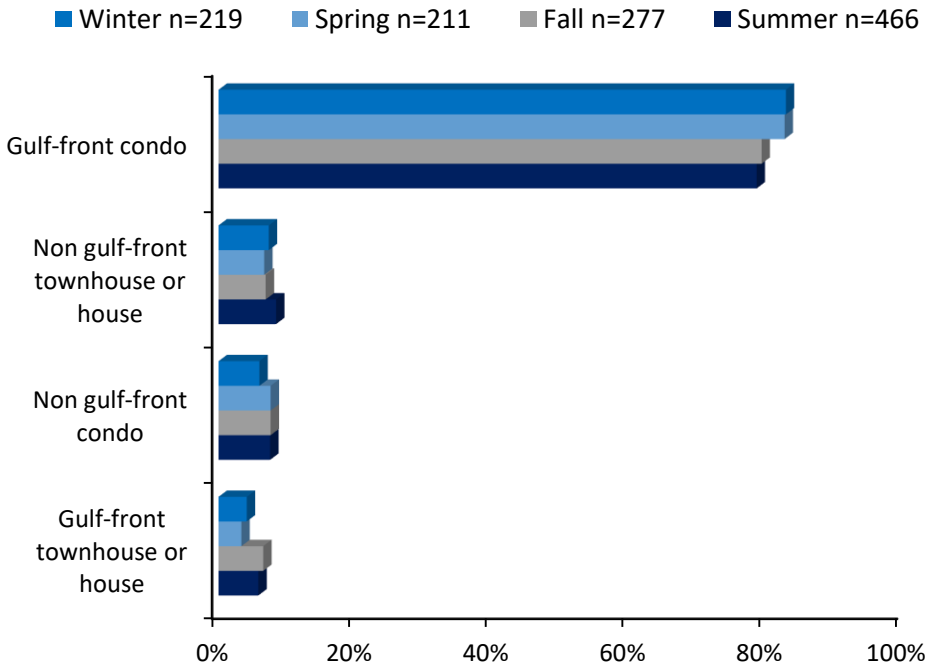
Response Category	Winter n=337	Spring n=383	Summer n=740	Fall n=519
Vacation condo/townhouse rental	**63.6%**	**47.4%**	**53.7%**	**48.2%**
Hotel/Motel	**16.2%**	**30.4%**	**24.3%**	**26.7%**
Vacation house rental	5.7%	4.6%	6.6%	5.0%
OWNER of vacation house/condo (non-resident)	4.7%	5.2%	6.3%	11.0%
Friends or family house/condo	4.7%	3.0%	3.1%	5.3%
Timeshare	4.0%	6.0%	3.1%	3.4%
Campground/RV PARK	1.0%	3.0%	2.9%	0.5%
Religious Retreat Center	0.0%	0.5%	0.0%	0.0%

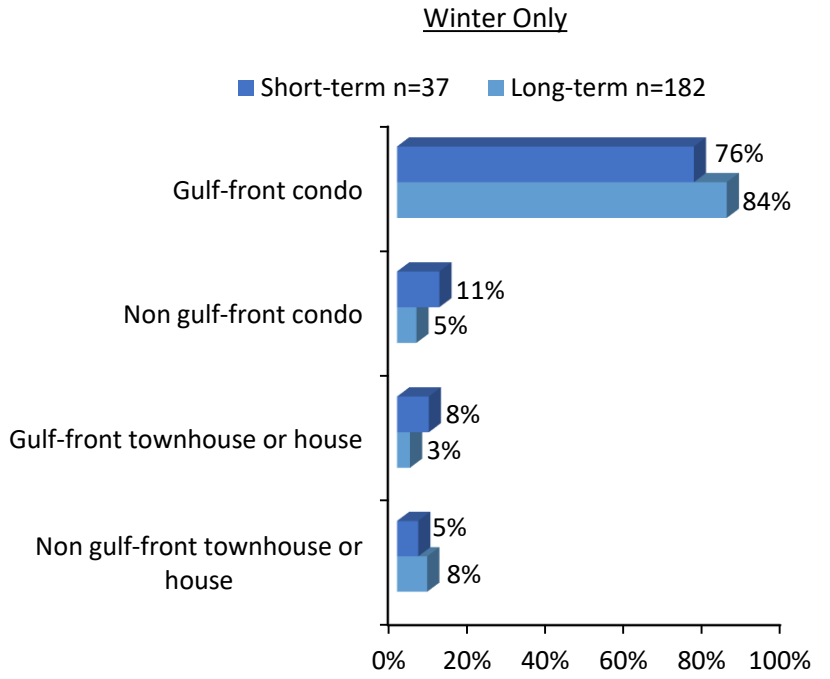
Observations:

- The most popular accommodation types visitors specify consistently over all four seasons are vacation condo/townhouse rental followed by hotel/motel.

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Type of Vacation Rental Property Accommodations – 2018





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

Response Category	Winter n=219	Spring n=211	Summer n=466	Fall n=277
Gulf-front condo	**82.7%**	**82.5%**	**78.3%**	**79.1%**
Non gulf-front townhouse or house	7.3%	6.6%	8.4%	6.9%
Non gulf-front condo	5.9%	7.6%	7.5%	7.6%
Gulf-front townhouse or house	4.1%	3.3%	5.8%	6.5%

Observations:

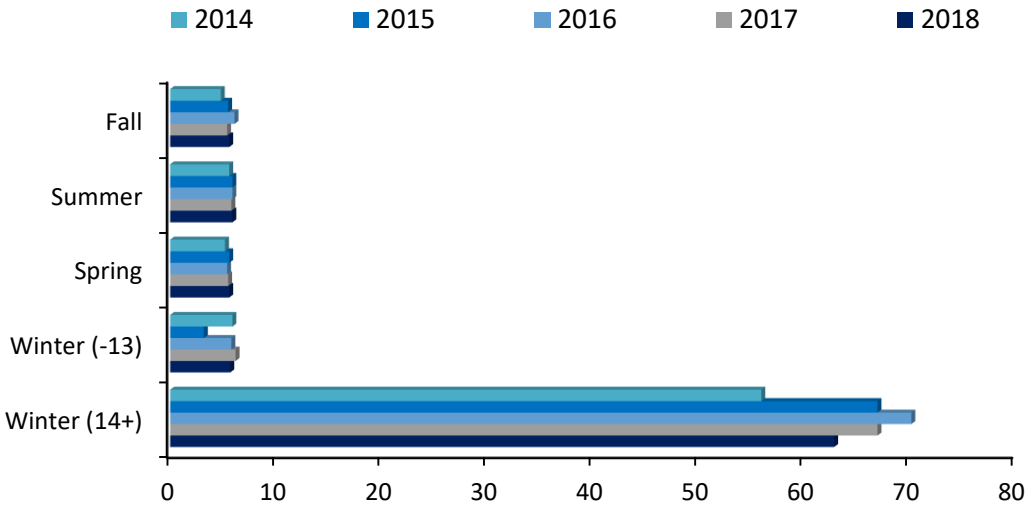
- Gulf-front condos are the most popular vacation rental property type across all segments; including short and long-term winter rentals.

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Average Length of Stay

How many nights did you stay in Panama City Beach on your most recent visit?

Winter 14+ n=202; Winter -13 n=99; Spring n=328; Summer n=692; Fall n=400



Response Category	Winter 14+ n=202	Winter -13 n=99	Spring n=328	Summer n=692	Fall n=400
2013	74.5	5.7	5.6	5.7	5.7
2014	56.0	5.9	5.2	5.6	4.8
2015	67.0	3.2	5.6	5.9	5.5
2016	70.2	5.8	5.4	5.9	6.1
2017	67.0	6.2	5.5	5.8	5.4
2018	62.9	5.7	5.6	5.9	5.6

Observations:

- Average length of stay 2013 - 2018 is consistent in each of the four seasons.
- As expected, winter long-term visitors (14+ nights) length-of-stay is significantly longer than any other season.

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

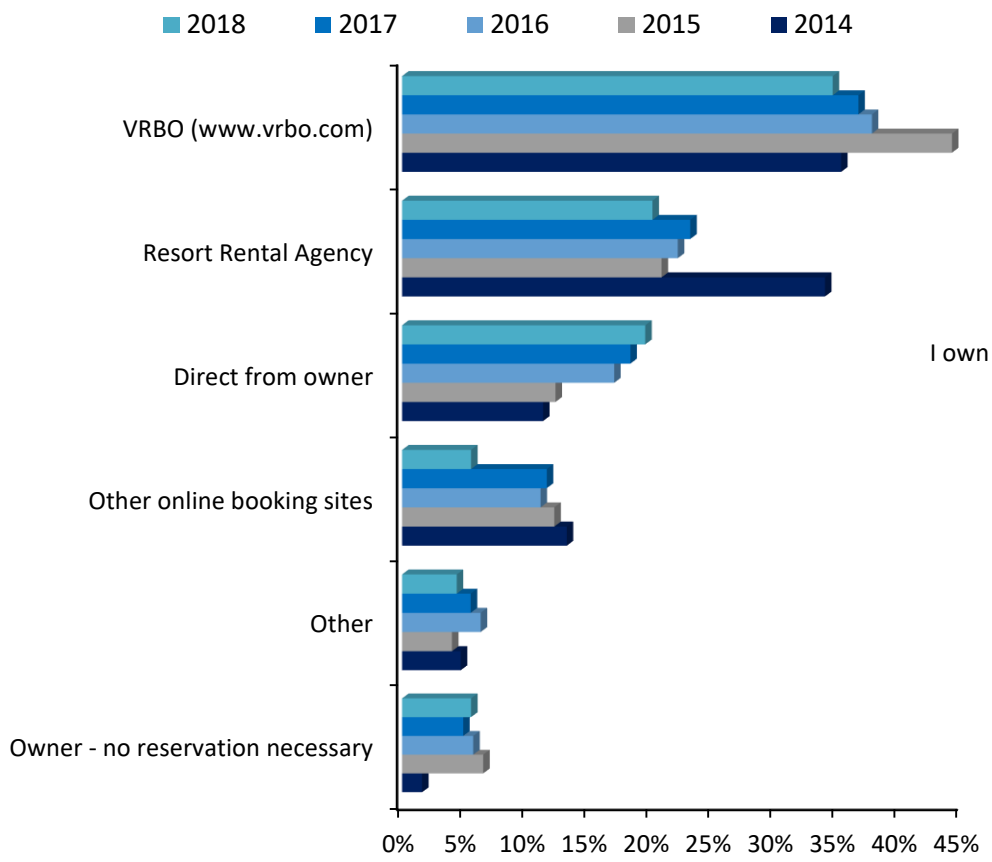
Vacation Rental Property

Observations:

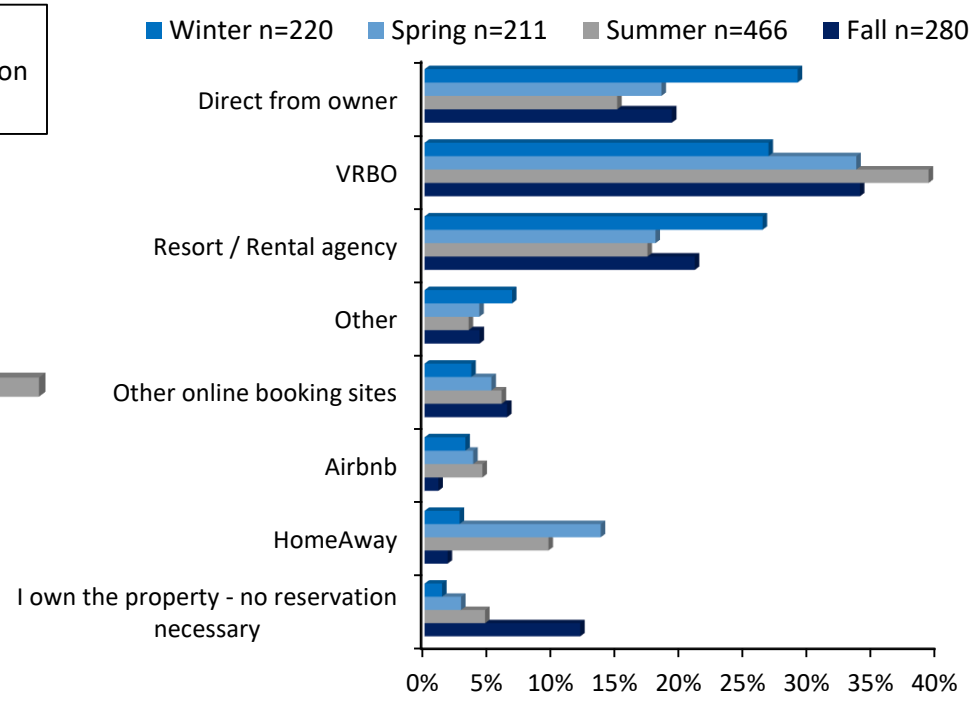
- Respondents in all four seasons indicated the two top rental reservation methods were with VRBO or a resort/rental agency.

How did you reserve your vacation rental? n=1,211

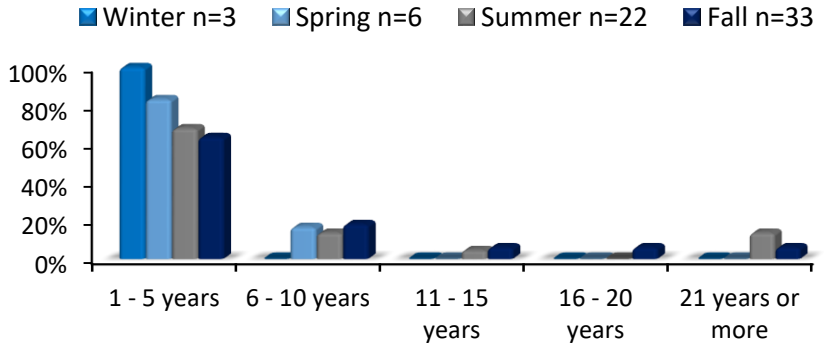
4-YR Comparison



2018 Seasonal Comparison



How long have you owned your vacation property at PCB?



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Vacation Rental Property

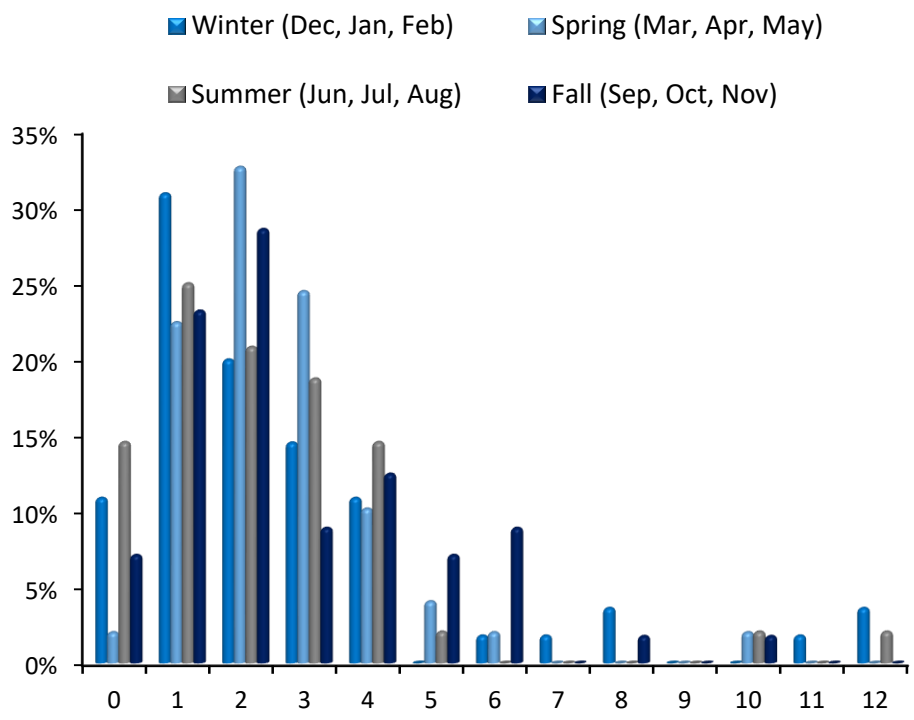
Please estimate the number of weeks in each season of the year that you use your property and the number of weeks that you rent/or share with friends/family?

Observations:

- Owners use their property generally between 1-3 weeks annually across all segments while the number of weeks owners shared with friends/family varied by season. As expected, summer had the highest response for sharing with friends/family.

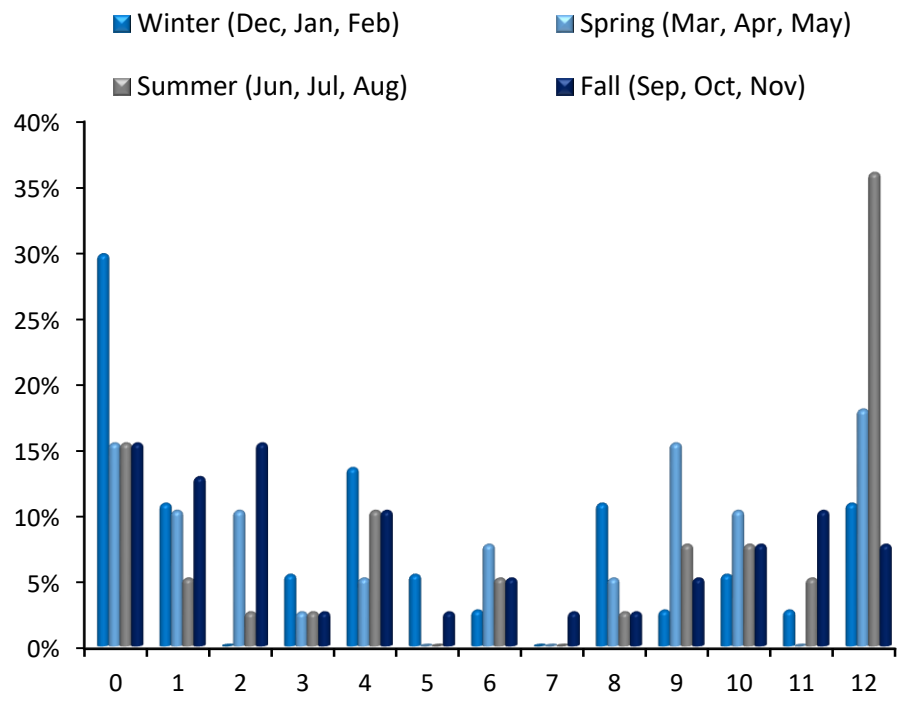
Owner Use

n=62



Rent property and/or share with friends/family

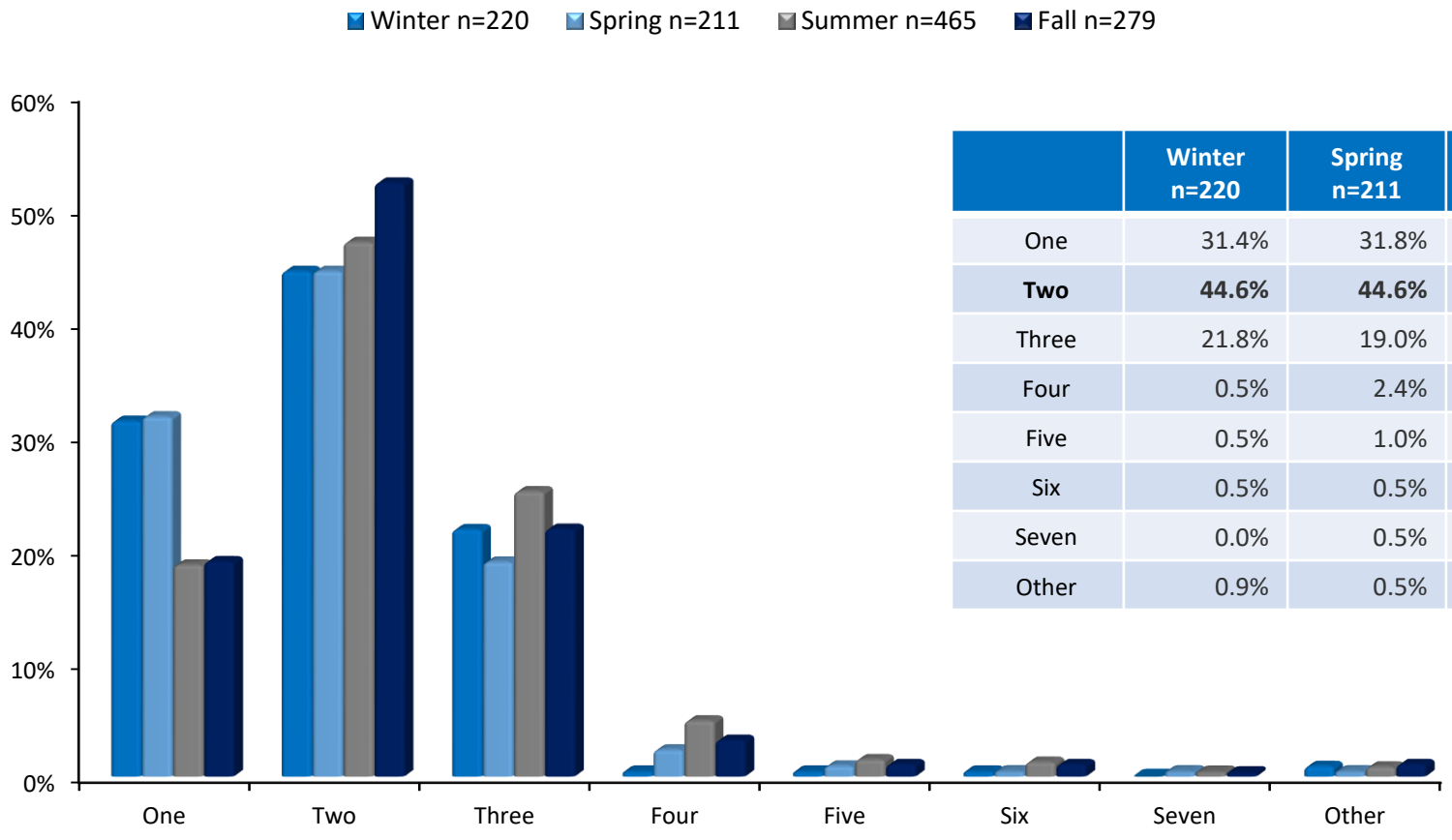
n=62



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Vacation Rental Property

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



	Winter n=220	Spring n=211	Summer n=465	Fall n=279
One	31.4%	31.8%	18.7%	19.0%
Two	**44.6%**	**44.6%**	**47.1%**	**52.3%**
Three	21.8%	19.0%	25.2%	21.9%
Four	0.5%	2.4%	5.0%	3.2%
Five	0.5%	1.0%	1.5%	1.1%
Six	0.5%	0.5%	1.3%	1.1%
Seven	0.0%	0.5%	0.4%	0.4%
Other	0.9%	0.5%	0.9%	1.1%

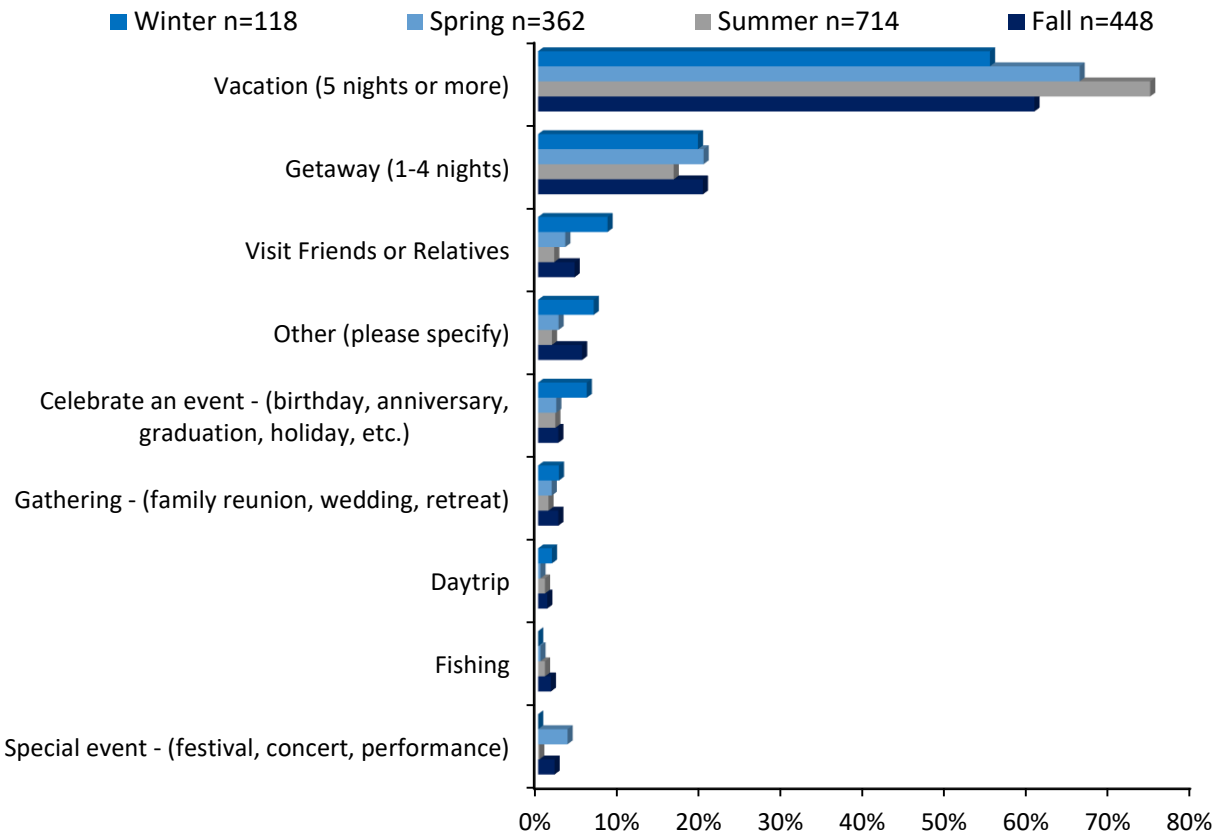
Observations:

- As expected, 1-3 bedrooms were in the majority of the rental units where visitors stayed with 2 bedrooms being the most popular choice.

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Primary Trip Purpose

Please identify the PRIMARY motivation for your most recent leisure visit to Panama City Beach



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

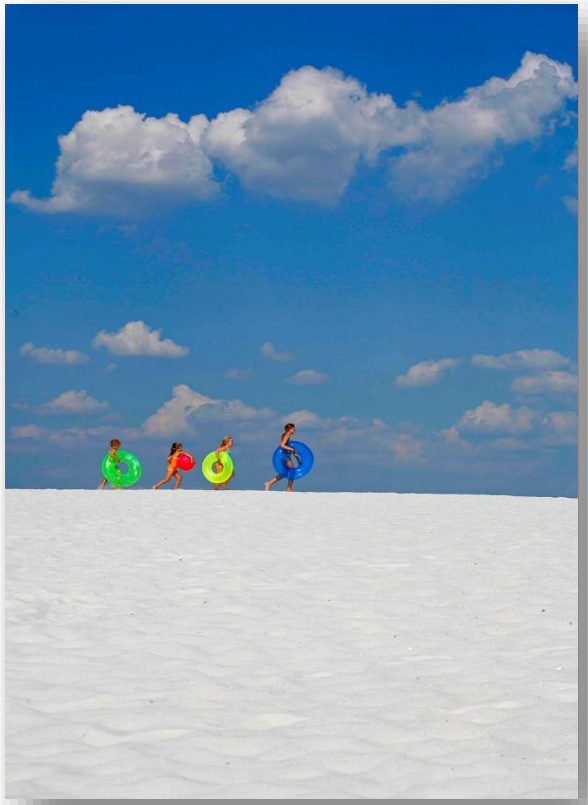
PCB Attractions

Which attractions or areas did you or someone in your travel party visit while in Panama City Beach?

	Winter n=285	Spring n=357	Summer n=679	Fall n=435
Beach	**95.4%**	**96.9%**	**98.2%**	**97.0%**
Pier Park	**91.9%**	**86.8%**	**84.2%**	**82.1%**
Thomas Drive	**65.6%**	**48.7%**	**48.6%**	**52.6%**
St. Andrew's State Park	53.3%	44.3%	39.0%	29.0%
Captain Andersons Marina	36.8%	33.6%	33.1%	24.1%
County Pier	35.8%	35.6%	22.5%	21.4%
Sharkys Harpoon Harry's	34.7%	30.3%	28.6%	23.2%
Thomas Donut Shop	31.2%	21.0%	17.4%	17.0%
Golf course	30.5%	9.2%	6.5%	4.6%
Aaron Bessant Park (concerts)	24.9%	3.9%	1.9%	3.5%
Frank Brown Park (ball fields/Aquatic park)	24.9%	5.0%	2.5%	3.5%
Gulf World	17.9%	16.3%	17.5%	10.6%
Edgewater/Holiday Inn area	16.8%	7.8%	6.0%	7.6%
Putt putt/mini golf	14.7%	23.8%	27.7%	18.6%
Zoo World	11.6%	8.1%	8.4%	7.6%
Ripley's Believe It or Not	10.9%	12.6%	12.8%	7.1%
Other (please specify)	10.5%	12.9%	13.4%	14.7%
Sandpiper Beacon Beach	7.7%	5.3%	4.4%	6.2%
WonderWorks	7.4%	8.1%	10.2%	4.1%
Dave & Buster's	7.0%	11.8%	12.4%	8.1%
Carillon Beach	6.0%	3.6%	3.4%	3.2%
Shipwreck Island	4.6%	7.3%	10.9%	6.7%
Go carting	1.8%	12.6%	20.5%	9.4%
Church Retreat Center	1.4%	0.6%	0.0%	0.2%

Observations:

- The beach, Pier Park and Thomas Drive continue to be the top attractions in Panama City Beach for all visitors.



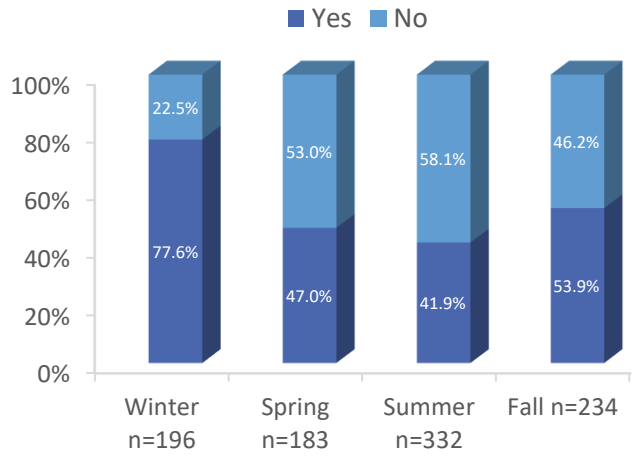
Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Festivals / Events

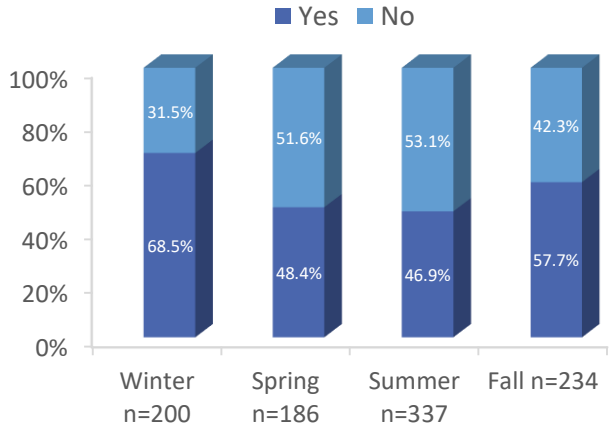
Please tell us which festivals/events you or someone in your travel party attended while in PCB over the last 2 years?

	Winter n=175	Spring n=99	Summer n=115	Fall n=150
Mardi Gras	82.9%	11.1%	7.8%	12.7%
New Year's Eve	26.3%	18.2%	17.4%	20.0%
Emerald Coast Cruzin'	14.9%	7.1%	13.0%	13.3%
Emerald Coast Boat & Lifestyle Show	12.0%	7.1%	5.2%	5.3%
Other	9.1%	30.3%	27.8%	26.7%
UNwineD	5.1%	3.0%	0.9%	2.0%
Emerald Coast Cruzin'	4.0%	6.1%	8.7%	4.7%
Thunder Beach Fall	2.9%	11.1%	10.4%	15.3%
Thunder Beach Spring	2.3%	17.2%	14.8%	13.3%
Pirates Festival	2.3%	8.1%	12.2%	26.7%
Jeep Jam	1.7%	13.1%	5.2%	4.7%
Oktoberfest	1.7%	4.0%	5.2%	11.3%
Home for the Holidays	1.7%	3.0%	3.5%	8.7%
PCB Marathon	1.7%	1.0%	0.9%	2.7%
Seabreeze Jazz	1.1%	6.1%	3.5%	3.3%
Pepsi Gulf Coast Jam	1.1%	5.1%	14.8%	12.0%
SandJam	0.6%	5.1%	3.5%	2.7%

Did attending this event(s) enhance your perception of PCB as a tourist destination?



Did attending this event(s) enhance the likelihood of you returning to PCB for another vacation?



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

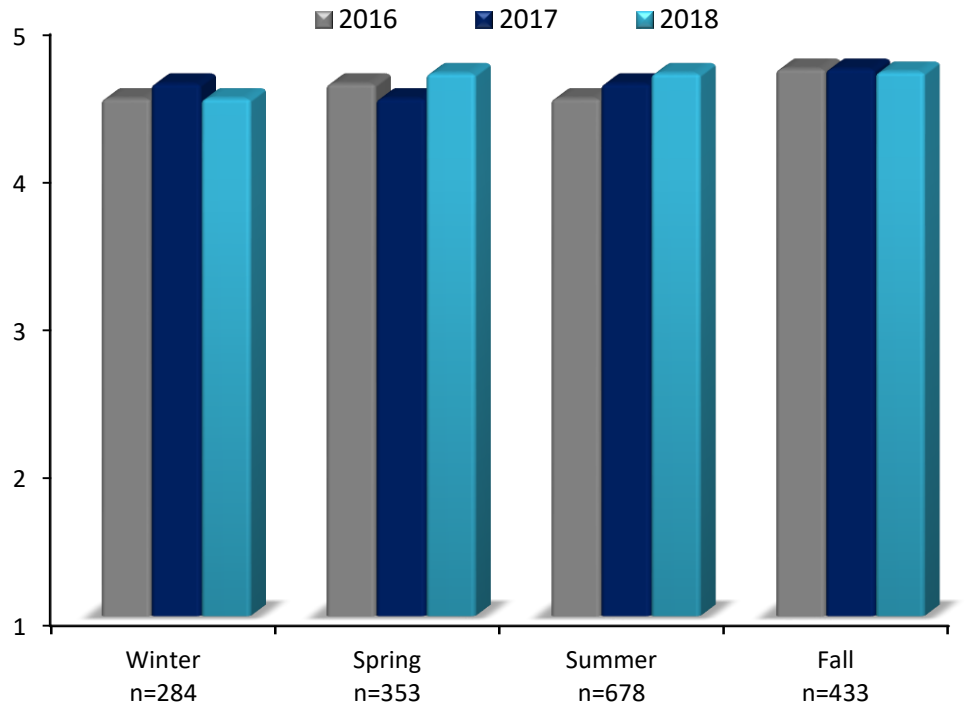
Overall PCB Visitor Satisfaction Ratings

Observations:

- Overall visitor satisfaction to Panama City Beach has continually improved year-over-year as shown in the graph below. The PCBCVB and their travel partners continue to create a fun, beach destination resulting in year-round visitor satisfaction.

3-YR Comparative by Season

2018 OVERALL VISITOR RATING = 4.65
2017 OVERALL VISITOR RATING = 4.58
2016 OVERALL VISITOR RATING = 4.55
Consistently high satisfaction on a five point scale.



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

PCB 2018 Visitor Amenities Satisfaction Rating

Following is a list of amenities offered in Panama City Beach. Considering this visit, please rate each amenity on a on a 5 point scale (1 is poor, 3 is average and 5 is excellent).

Observations:

- Visitors from all four seasons consistently rated the amenities offered in PCB high; most averages reported at a 4.0 or higher. Quality of beaches, range of dining choices and quality of accommodations continue to top the charts for visitor satisfaction.
- Areas identified for improvement are in red font in table below. Visitors from all seasons reported traffic as an issue. Spring break activities rated low from all segments which is to be expected given they are not there in the Spring. Finally, night life and variety of children activities were rated low by winter visitors.

	Winter n=283	Spring n=352	Summer n=676	Fall n=431
Quality of beaches	4.78	4.81	4.78	4.72
Range of choices for dining out	4.42	4.5	4.56	4.60
Quality of your accommodations	**4.34**	4.43	4.46	4.54
Ease of finding visitor information	4.33	4.26	4.33	4.44
Quality of dining out	4.32	4.39	4.44	4.52
Lodging value you received for the price paid	4.31	4.21	4.16	4.31
Attractiveness/landscaping of the destination	4.25	4.49	4.52	4.53
Variety of shopping & merchandise	4.25	4.3	4.38	4.45
Overall appeal of the attractions in the area	4.23	4.46	4.52	4.54
Level of service / employee training	4.06	4.21	4.21	4.30
Signage and wayfinding	4.03	4.20	4.26	4.34
Variety of children's activities	3.83	4.12	4.24	4.25
Night life	3.80	3.96	3.96	4.16
Ease of traffic	3.55	3.37	3.07	3.64

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

PCB Popularity

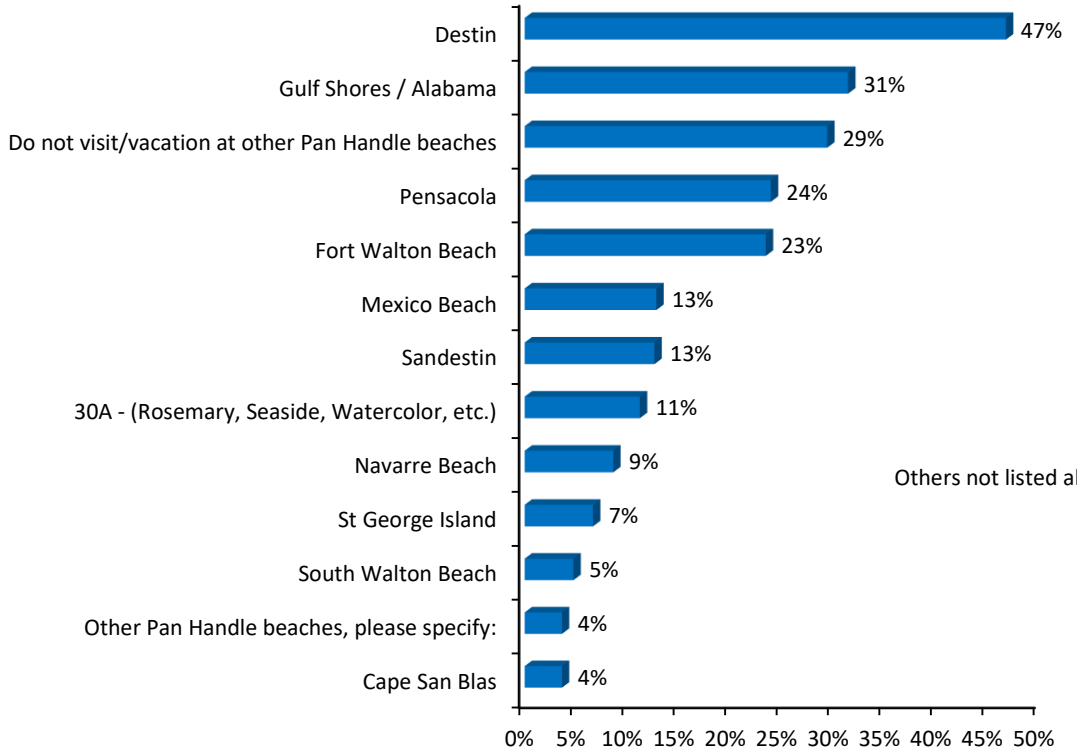
What other panhandle or Florida beach destinations have you visited?

Observations:

- The majority of survey respondents are highly likely to recommend PCB to others and indicate they plan to make a return visit.
- The charts at the bottom of this page identify the Florida beaches that have been visited by survey respondents indicating these as possible competitive markets.
- PCBCVB must continue to aggressively market to repeat and first-time visitors as the data shows visitors will go elsewhere if not reminded to return to PCB.

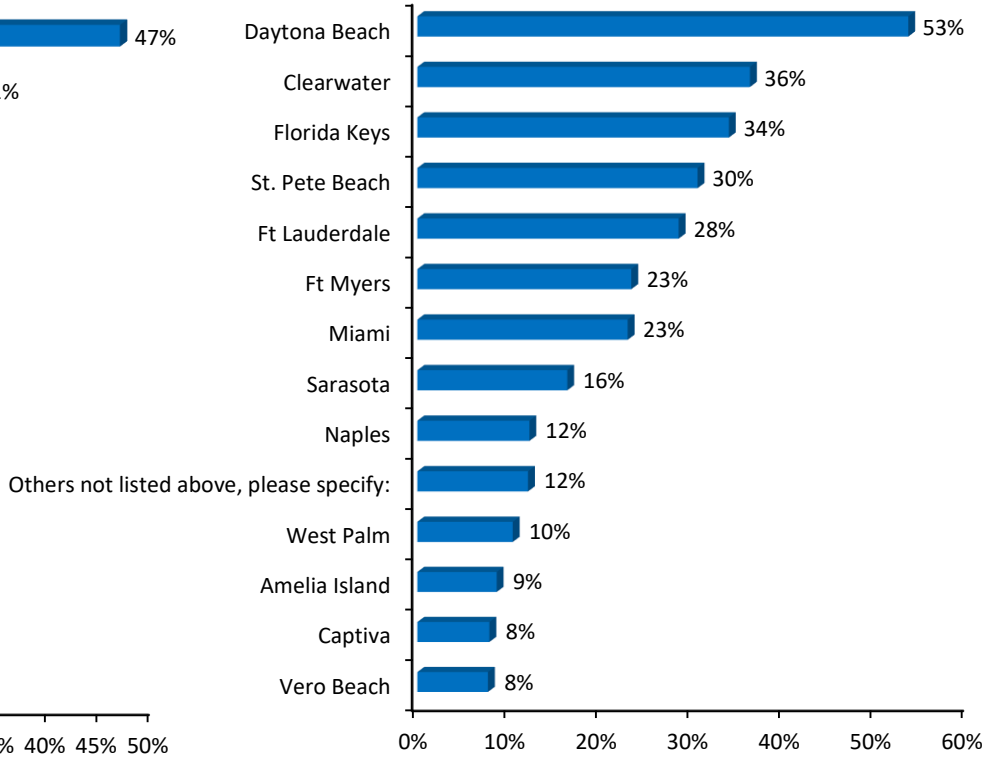
Other Panhandle Beaches Visited

n=1,628



Other Florida Beaches Visited

n=1,266



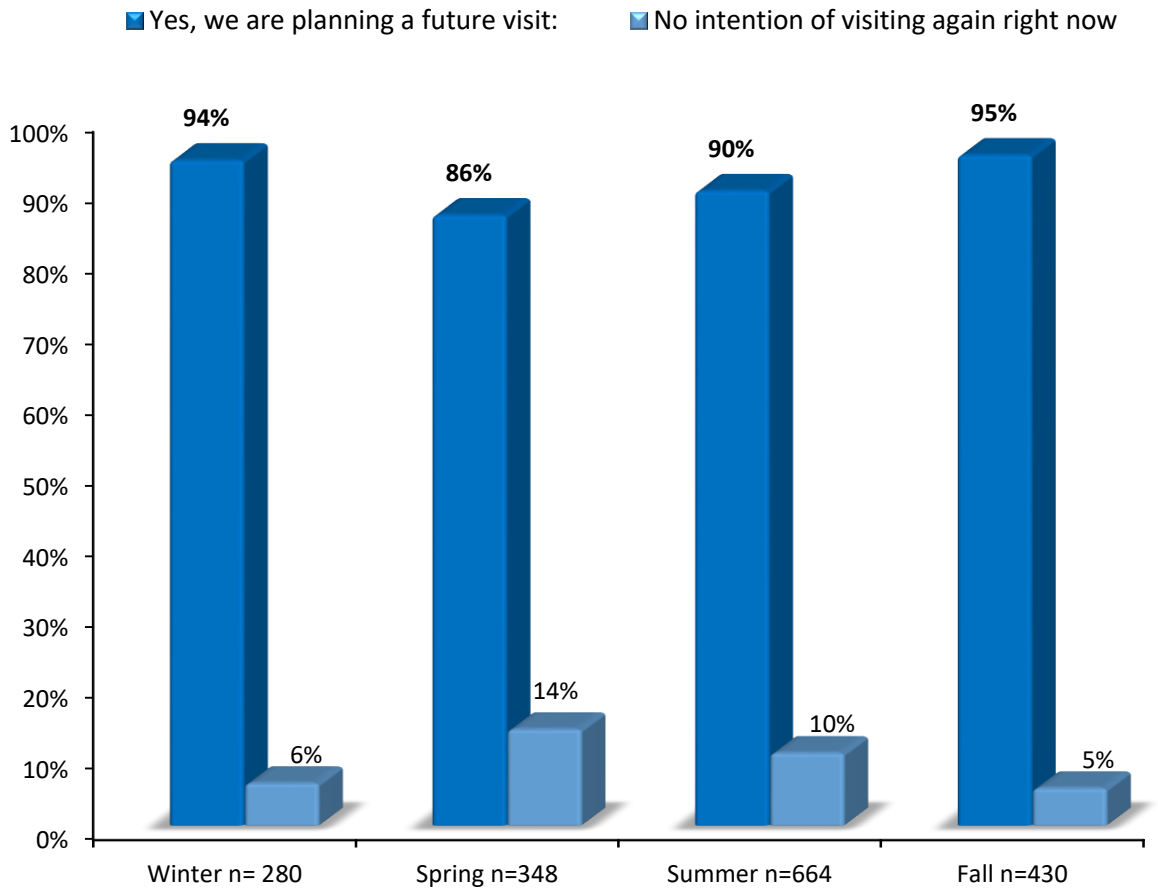
Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Future Visit

Are you planning a future visit to Panama City Beach?

Observations:

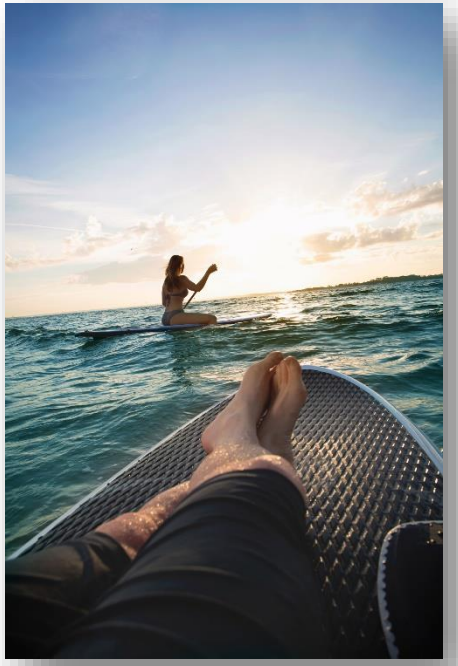
- Visitors from all seasons continue to indicate a strong desire to return and recommend the area to others which confirms the high level of satisfaction reported earlier.



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Travel PARTY Spending (Total Trip)

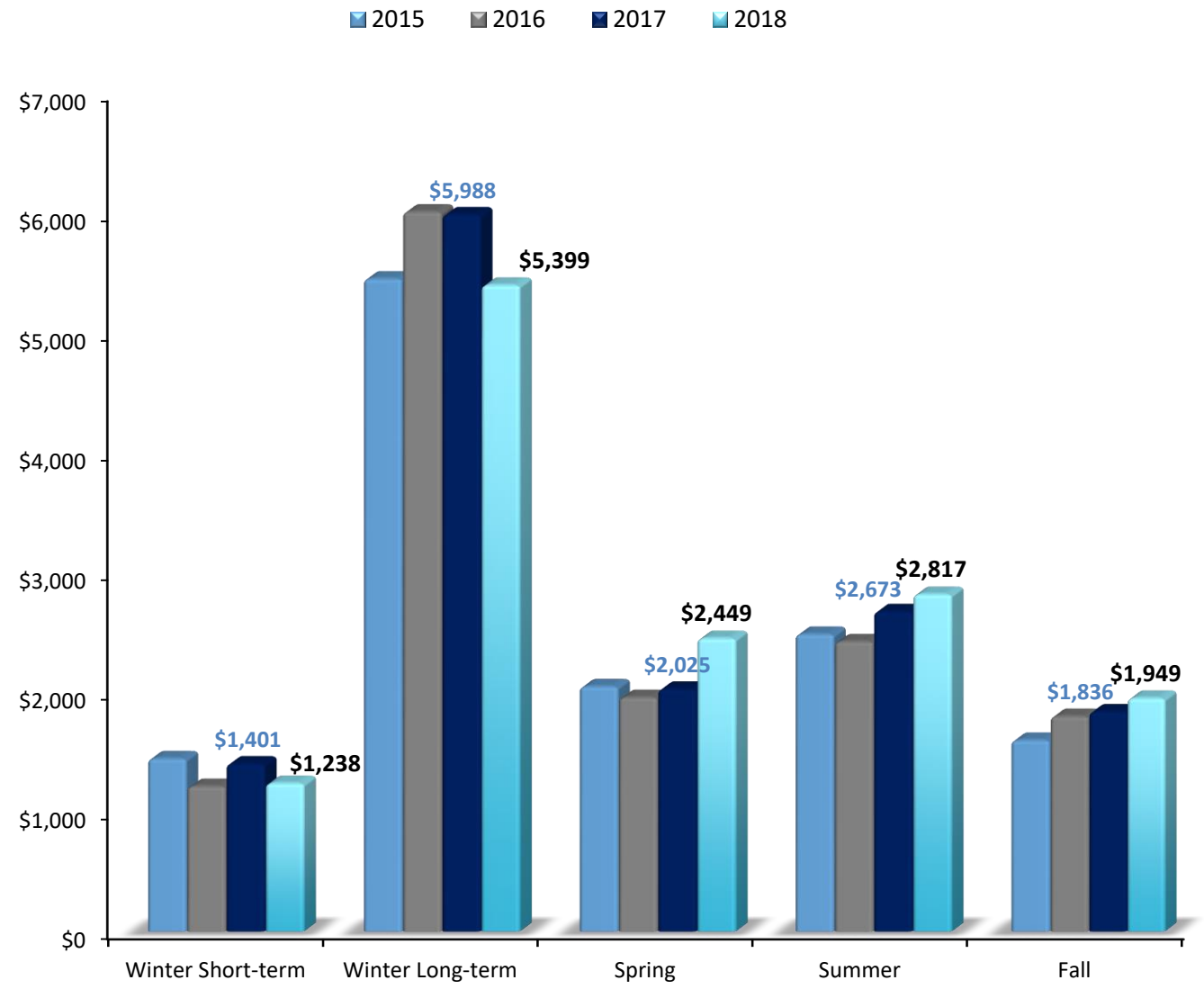
Spending Category	Winter Short-term n=99	Winter Long-term n=202	Spring n=380	Summer n=718	Fall n=457
Lodging	$664.34	$3,146.56	$1,250.25	$1,688.35	$1,071.87
(% of reporting)	(76.8%)	(85.1%)	(62.9%)	(85.9%)	(82.1%)
Dining/Food	$359.70	$1,338.88	$586.95	$640.60	$516.08
(% of reporting)	(80.8%)	(77.7%)	(87.9%)	(84.3%)	(86.2%)
Shopping	$195.30	$542.37	$345.05	$338.20	$307.71
(% of reporting)	(50.5%)	(73.8%)	(75.5%)	(75.1%)	(73.5%)
Attractions	$193.75	$280.43	$293.58	$312.22	$205.92
(% of reporting)	(44.4%)	(58.9%)	(59.5%)	(66.9%)	(50.5%)
Local Transportation	$98.42	$272.39	$111.77	$98.94	$86.29
(% of reporting)	(33.3%)	(49.5%)	(36.1%)	(33.3%)	(36.5%)
Bars	$131.16	$320.12	$177.38	$191.95	$165.87
(% of reporting)	(38.4%)	(50.0%)	(33.7%)	(24.2%)	(29.3%)
Other	$210.00	$619.00	$312.26	$242.86	$321.60
(% of reporting)	(13.1%)	(17.3%)	(17.4%)	(11.8%)	(11.6%)
Average Total Spending Per Travel Party	**$1,238.17***	**$5,398.60***	**$2,448.67***	**$2,816.65***	**$1,949.00***
(% of reporting)	**(91.9%)**	**(85.6%)**	**(92.6%)**	**(92.9%)**	**(92.6%)**
Average total # in Travel Party	***2.7***	***2.2***	***3.2***	***4.2***	***3.1***
Average Length of Stay	***5.7 nights***	***62.9 nights***	***5.6 nights***	***5.9 nights***	***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.

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

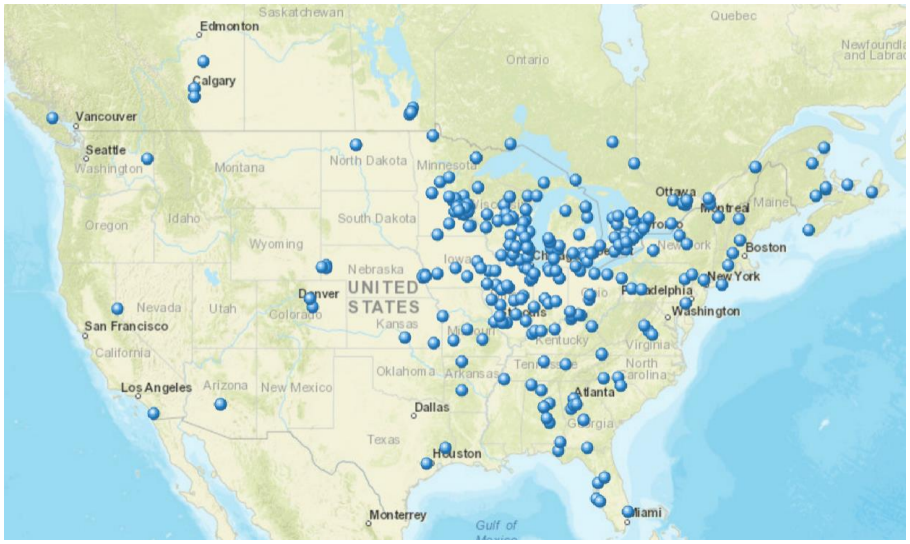
Travel PARTY Spending by Season (Total Trip)



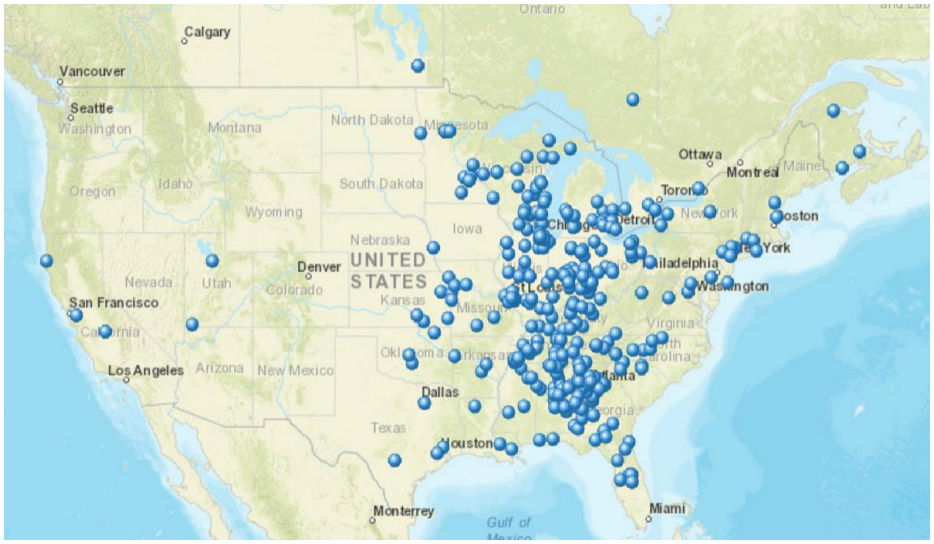
Observations: Spring, summer and Fall spending per travel party was reported higher in 2018 while winter spending per travel party was down. Summer is the busiest season of the year followed by Spring and Fall. Winter is traditionally the season with the lowest visitation.

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

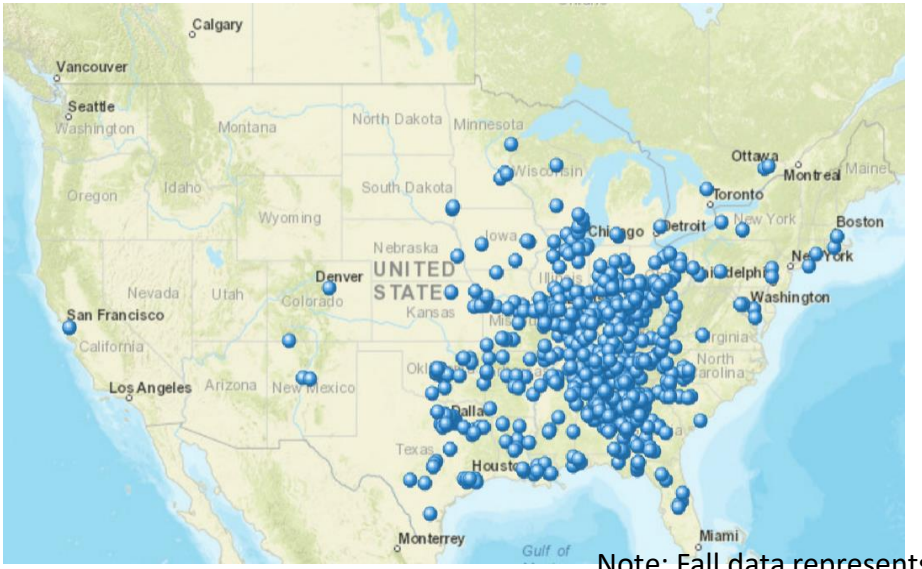
2017/2018 Winter Visitor Survey Respondents Map n=304



2018 Spring Visitor Survey Respondents Map n=380



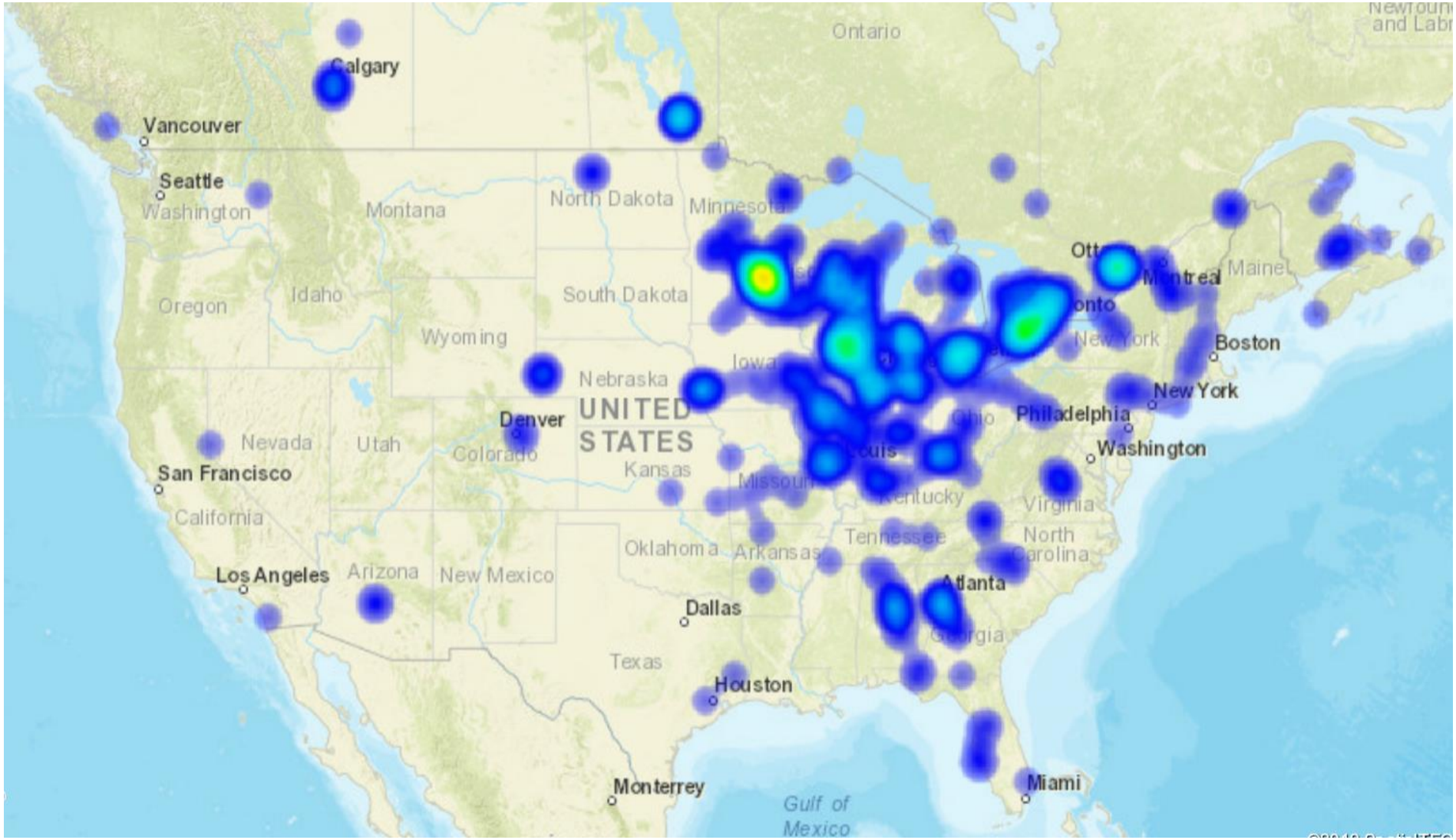
2018 Summer Visitor Survey Respondents Map n=718



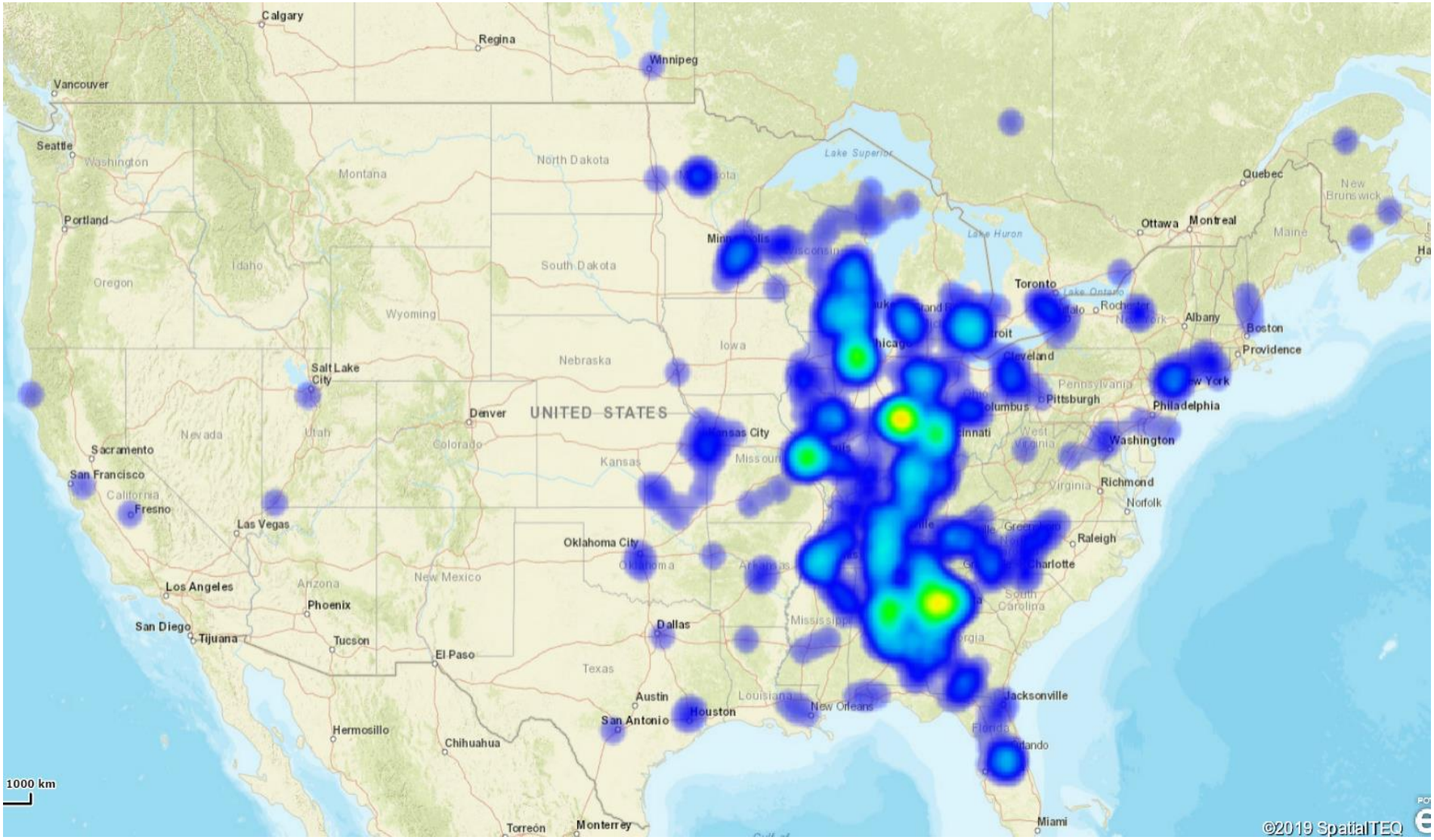
2018 Fall Visitor Survey Respondents Map n=455

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

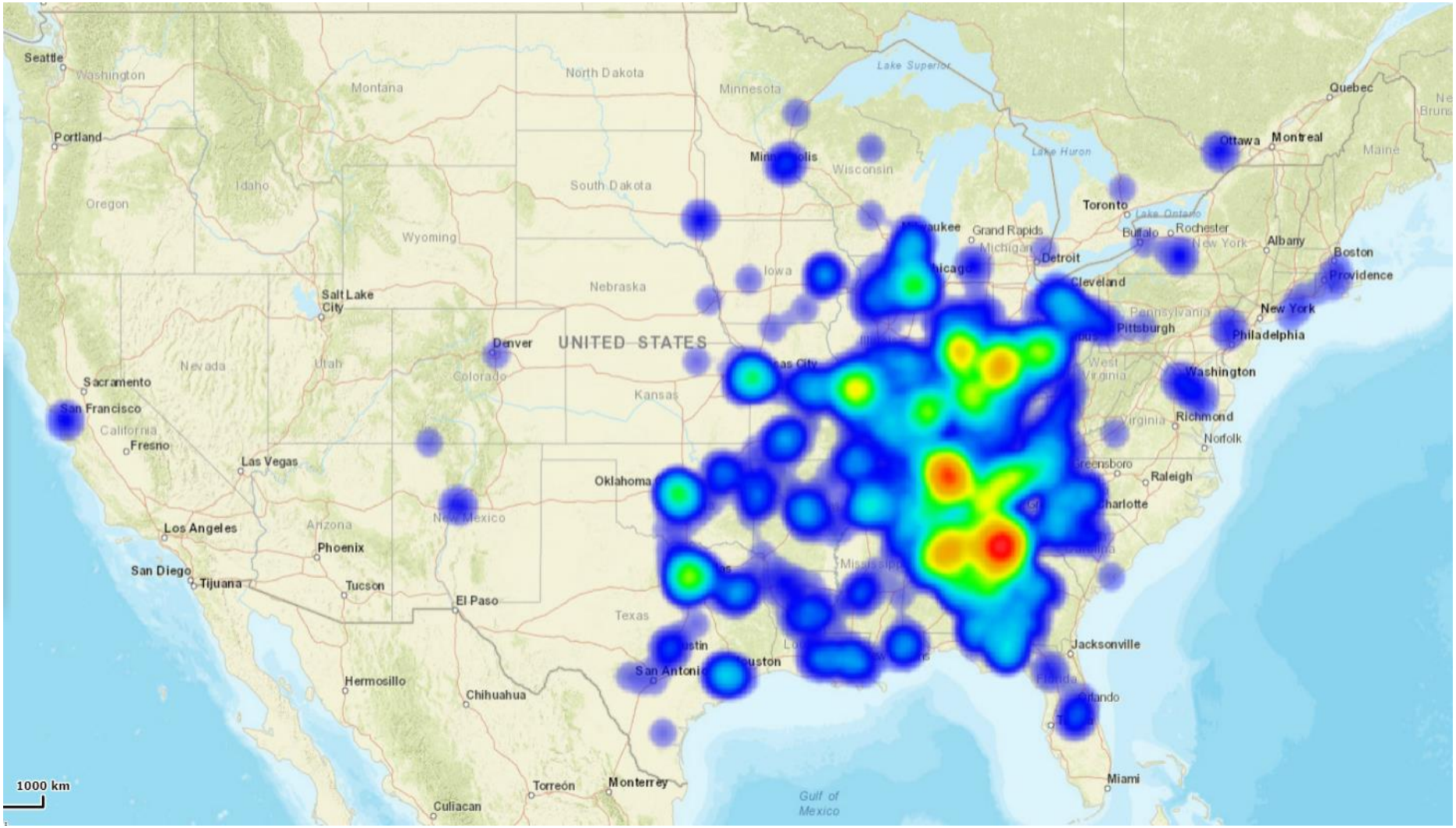
2017/2018 Winter Visitor Survey Respondents Map n=304



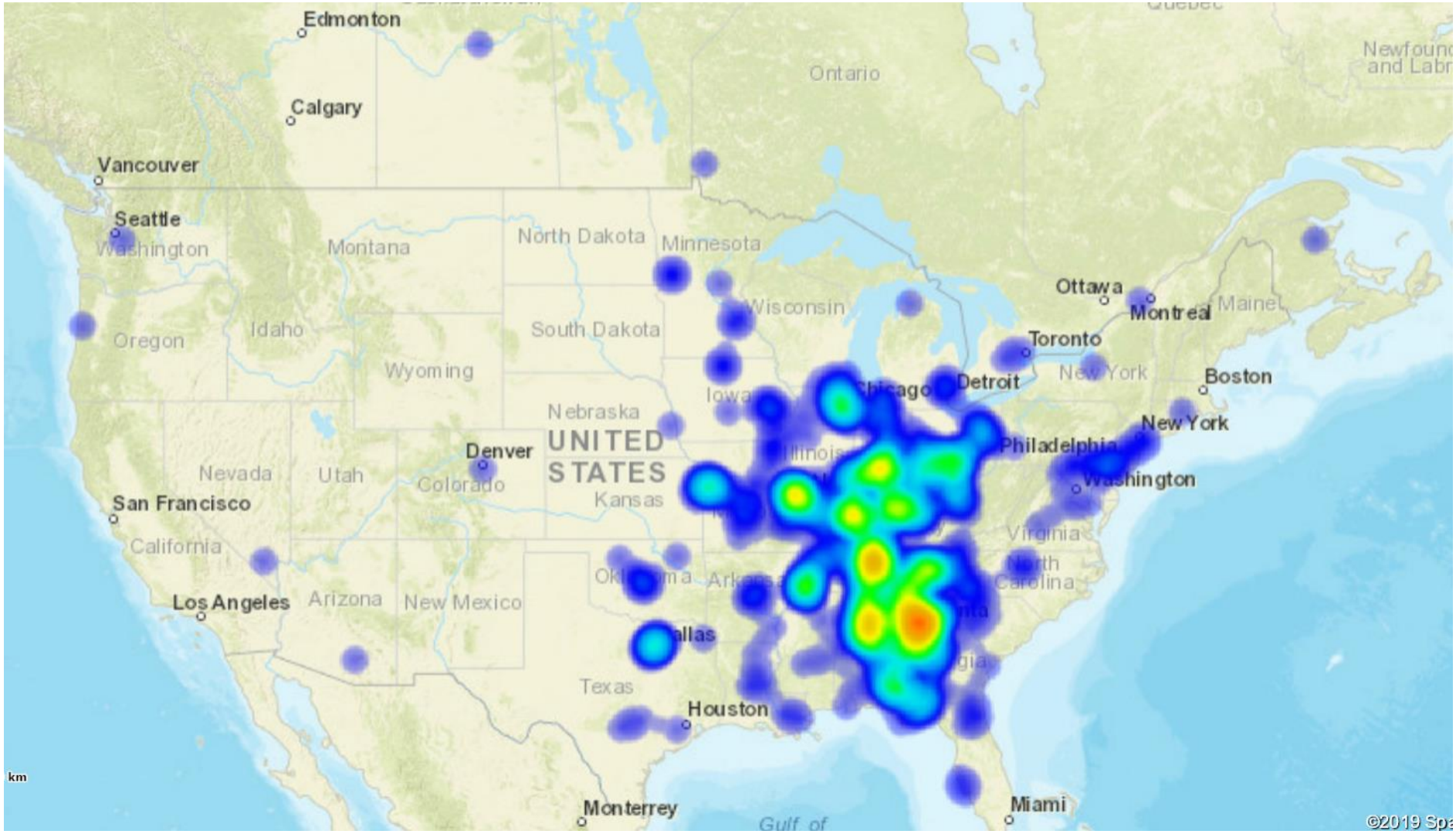
2018 Spring Visitor Survey Respondents Map n=380



2018 Summer Visitor Survey Respondents Map n=718



2018 Fall Visitor Survey Respondents Map n=455



Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Visitors Point of Origin – Winter

State - City									
WISCONSIN- 17.9%		**MINNESOTA- 12.0%**		Aurora	1	Greenbush	1	Pell City	1
Beloit	3	Alexandria	2	Byron	1	Macomb	1	**OHIO- 3.8%**	
River Falls	3	Blaine	2	Champaign	1	Mancelona	1	Cincinnati	1
Fitchburg	2	Cottage Grove	2	Decatur	1	Mason	1	Cleveland	1
Fort Atkinson	2	Hastings	2	Elgin	1	Munising	1	Galloway	1
Franklin	2	Rochester	2	Franklin	1	Muskegon	1	Girard	1
Holmen	2	Babbitt	1	Germantown	1	Norton Shores	1	Lake Waynoka	1
Lena	2	Apple Valley	1	Gurnee	1	Paw Paw	1	Powell	1
Merrill	2	Babbitt	1	Ivesdale	1	Plymouth	1	Sanduskt	1
Minong	2	Becker	1	Lemont	1	Sterling Heights	1	Swanton	1
Osceola	2	Coon Rapids	1	Marengo	1	Whitehall	1	Williamsburg	1
Rhinelander	2	Crosslake	1	Morton	1	**INDIANA- 6.4%**		**GEORGIA- 3.4%**	
Augusta	1	Jackson	1	Mt Sterling	1	Columbia City	2	Stockbridge	2
Combined Locks	1	Maple Grove	1	Olney	1	Goshen	2	Warner Robins	2
Cottage Grove	1	Minneapolis	1	Peoria	1	Saint John	2	Jonesboro	1
De Pere	1	North Mankato	1	Saint Anne	1	South Bend	2	Sandy Springs	1
Fond Du Lac	1	Princeton	1	Saint Elmo	1	Chandler	1	Senoia	1
Iola	1	Rush City	1	Warren	1	Evansville	1	Valdosta	1
Madison	1	Sauk Rapids	1	**MICHIGAN- 10.7%**		Indianapolis	1	**IOWA- 3.4%**	
Mosinee	1	Staples	1	Alpena	2	Indpls	1	Ankeny	1
New Richmond	1	Stillwater	1	Holland	2	Jamestown	1	Atlantic	1
Niagara	1	Victoria	1	Wixom	2	Lamar	1	Bettendorf	1
Pardeeville	1	Warroad	1	Ada	1	W. Terre Haute	1	Burlington	1
Pittsville	1	White Bear Lake	1	Bark River	1	**ALABAMA- 3.8%**		North Liberty	1
Plover	1	**ILLINOIS- 11.1%**		Bay City	1	Birmingham	3	Oskaloosa	1
Racine	1	Canton	2	Brighton	1	Dothan	1	Shellsburg	1
Scandinavia	1	Momence	2	Brownstown	1	Florence	1	Wilton	1
Sheboygan Falls	1	O Fallon	2	Caledonia	1	Hartselle	1	**NEBRASKA- 3.0%**	
Wauwatosa	1	Abingdon	1	Clayton	1	Marbury	1	Omaha	4
West Bend	1	Alton	1	Clinton Township	1	Montgomery	1	Gering	1

Visitors Point of Origin – Winter

State - City									
Lyman	1	**TENNESSEE- 1.7%**		Woodville	1	Okotoks	2	Sarnia	1
Scottsbluff	1	Cordova	1	**VERMONT- 0.9%**		St Jean Port Joli	2	Sault Ste. Marie	1
FLORIDA- 2.6%		Crossville	1	Colchester	2	Whitby	2	Selkirk	1
Boynton Beach	1	Madison	1	**CALIFORNIA- 0.4%**		Alix	1	Simcoe	1
Chipley	1	Sparta	1	San Diego	1	Aurora	1	Southampton	1
Longboat Key	1	**PENNSYLVANIA- 1.3%**		**CONNECTICUT- 0.4%**		Barrie	1	St. Eustache	1
Sarasota	1	Cheswick	1	Tolland	1	Bath	1	Sudbury	1
Spring Hill	1	Tafton	1	**DELAWARE- 0.4%**		Bathurst	1	Sussex	1
The Villages	1	White Haven	1	Wilmington	1	Burlington	1	Thunder Bay	1
MISSOURI- 2.1%		**ARKANSAS- 0.9%**		**MASSACHUSETTS- 0.4%**		Charlottetown	1	Timmins	1
Ballwin	1	Harrison	1	Gardner	1	Cobalt	1	Toronto	1
Dadeville	1	Hot Springs	1	**NEW JERSEY- 0.4%**		Courtenay	1	Waterloo	1
Kansas City	1	**ARIZONA- 0.9%**		Wanaque	1	Dieppe	1	Woodbridge	1
Lake Ozark	1	Scottsdale	2	**NEVADA- 0.4%**		East St Paul	1		
Salem	1	**COLORADO- 0.9%**		Reno	1	Elora	1		
VIRGINIA- 2.1%		Parker	1	**SOUTH CAROLINA- 0.4%**		Gascons	1		
Bristol	2	Thornton	1	Lancaster	1	Hanover	1		
Charlottesville	1	**KANSAS- 0.9%**		**WASHINGTON- 0.4%**		Ingersol	1		
Harrisonburg	1	Parsons	1	Spokane	1	Kanata	1		
Palmyra	1	Wichita	1			Kemptville	1		
KENTUCKY- 1.7%		**NORTH CAROLINA- 0.9%**				Kitchener	1		
Crittenden	1	Charlotte	1	**INTERNATIONAL**		Lindsay	1		
Grayson	1	Columbus	1	**CANADA**		Malagawatch	1		
Independence	1	**NORTH DAKOTA- 0.9%**		Ottawa	7	Mitchell	1		
Louisville	1	Minot	2	Brantford	4	Owen Sound	1		
NEW YORK- 1.7%		**NEW HAMPSHIRE- 0.9%**		Winnipeg	4	Port Perry	1		
Mastic	1	Lancaster	1	Bobcaygeon Ont	2	Port Stanley	1		
Pulaski	1	Loudon	1	Calgary	2	Renfrew ON	1		
Sherrill	1	**TEXAS- 0.9%**		Midland	2	Riverview	1		
Warsaw	1	Katy	1	Oakville	2	Sainte-Martine	1		

Visitors Point of Origin – Spring

State - City									
GEORGIA- 10.9%		Watkinsvile	1	Galesburg	2	Moody	2	**TENNESSEE- 9.0%**	
Newnan	3	Woodstock	1	Mt Zion	2	Phenix City	2	Columbia	3
Adel	2	Zebulon	1	Antioch	1	Selma	2	Memphis	3
Americus	2	**INDIANA- 10.1%**		Bartlett	1	Alabaster	1	Arlington	2
Bogart	2	Indianapolis	9	Beardstown	1	Alexandria	1	Cleveland	2
Bremen	2	Fort Wayne	3	Belleville	1	Athens	1	Joelton	2
Cave Spring	2	Brownsburg	2	Carmi	1	Auburn	1	Knoxville	2
Lafayette	2	Jeffersonville	2	Carol Stream	1	Bessemer	1	Chattanooga	1
Adairsville	1	Pittsboro	2	Caseyville	1	Birmingham	1	Clarksburg	1
Atlanta	1	Warsaw	2	Centralia	1	Centreville	1	Cookeville	1
Austell	1	Bloomingdale	1	Danvers	1	Cullman	1	Dyersburg	1
Canton	1	Centerville	1	Decatur	1	Deatsville	1	Fayetteville	1
Carrollton	1	Columbus	1	Dennison	1	Dothan	1	Gadsden	1
Cedartown	1	Decatur	1	Diamond	1	Elmore	1	Hendersonville	1
Covington	1	Evansville	1	Granite City	1	Hartselle	1	Jackson	1
Cumming	1	Franklin	1	Iuka	1	Hayden	1	Lakeland	1
Douglas	1	Frankton	1	Joliet	1	Killen	1	Lynnville	1
Douglasville	1	Ft. Wayne	1	Joliet	1	Lake View	1	Mcminnville	1
Duluth	1	Hammond	1	Manteno	1	Lincoln	1	Nashville	1
Fayetteville	1	Lawrenceburg	1	Mount Vernon	1	Millport	1	Paris	1
Flowery Branch	1	Middletown	1	Orangeville	1	Mobile	1	Powell	1
Georgetown	1	Milan	1	Palos Hills	1	Odenville	1	Russellville	1
Lilburn	1	Noblesville	1	Riverside	1	Opelika	1	Sevierville	1
Locust Grove	1	Rising Sun	1	Riverton	1	Ozark	1	Shelbyville	1
Loganville	1	Union City	1	Rockford	1	Pinson	1	Spring Hill	1
Mableton	1	Washington	1	Spring Valley	1	Quinton	1	Springfield	1
Marietta	1	Westfield	1	Springfield	1	Roanoke	1	**WISCONSIN- 6.8%**	
Rossville	1	**ILLINOIS- 9.6%**		Wheaton	1	Rogersville	1	Jim Falls	2
Thomaston	1	Naperville	3	**ALABAMA- 9.3%**		Sterrett	1	New Berlin	2
Valdosta	1	Alton	2	Montgomery	2			Oostburg	2

Visitors Point of Origin – Spring

State - City									
Sun Prairie	2	Russell Springs	1	Cleveland	1	Tallahassee	1	Holly Springs	1
Appleton	1	Summersville	1	Cleves	1	Wesley Chapel	1	Pontotoc	1
Freedom	1	Waddy	1	Columbus	1	Williston	1	Raymond	1
Ft Atkinson	1	Walton	1	Marysville	1	Winter Garden	1	Sebastopol	1
Green Bay	1	West Paducah	1	New Franklin	1	**MINNESOTA- 2.7%**		Tupelo	1
Green Lake	1	**MICHIGAN- 5.7%**		New Paris	1	Lakeville	2	**KANSAS- 1.1%**	
Jeffert	1	Kalamazoo	2	North Baltimore	1	Park Rapids	2	Andover	1
Kenosha	1	Macomb	2	Oxford	1	Akeley	1	Cambridge	1
Merrill	1	Bay City	1	Springfield	1	Chaska	1	Girard	1
Milwaukee	1	Escanaba	1	Wauseon	1	Houston	1	Lawrence	1
Monona	1	Germfask	1	Westerville	1	Linwood	1	**NEW JERSEY- 1.1%**	
Nashotah	1	Grand Haven	1	Willoughby	1	Mendota Hghts	1	Verona	2
Oshkosh	1	Hudsonville	1	**MISSOURI- 3.8%**		St Clair	1	Galloway	1
Sheboygan	1	Kentwood	1	Saint Louis	3	**NORTH CAROLINA- 2.2%**		Newton	1
Suamico	1	Marquette	1	Arnold	2	Asheville	2	**SOUTH CAROLINA- 1.1%**	
Three Lakes	1	Melvin	1	Carrollton	1	Blanch	1	Inman	1
Wisconsin Rpds	1	Milford	1	Dardenne Prairie	1	Hickory	1	Lancaster	1
Woodville	1	Muskegon	1	Drexel	1	Marvin	1	Lyman	1
KENTUCKY- 5.7%		Northville	1	Kansas City	1	Stokesdale	1	Simpsonville	1
Louisville	3	Norway	1	Liberty	1	Thomasville	1	**TEXAS- 1.1%**	
Glasgow	2	Otisville	1	Saint Charles	1	Woodleaf	1	Houston	1
Lexington	2	Rochester	1	Saint Joseph	1	**NEW YORK- 1.9%**		Mesquite	1
Radcliff	2	White Lake	1	Salem	1	Canastota	2	New Caney	1
Bowling Green	1	Wlliamston	1	Seymour	1	Buffalo	1	San Antonio	1
Calhoun	1	Zeeland	1	**FLORIDA- 3.0%**		Cortlandt Manor	1	**ARKANSAS- 0.8%**	
Greensburg	1	**OHIO- 5.2%**		Kissimmee	2	East Marion	1	Cabot	1
Hopkinsville	1	Cincinnati	3	Orlando	2	Fredonia	1	Fort Smith	1
Kuttawa	1	Middletown	2	Jacksonville	1	Monroe	1	Mabelvale	1
Maysville	1	Canfield	1	Middleburg	1	**MISSISSIPPI- 1.6%**		**CALIFORNIA- 0.8%**	
Richmond	1	Canton	1	Pace	1	Hamilton	1	Dublin	1

Visitors Point of Origin – Spring

State - City			
Fortuna	1	**NORTH DAKOTA- 0.3%**	
Fresno	1	Fargo	1
LOUISIANA- 0.8%		**NEBRASKA- 0.3%**	
Arcadia	1	Omaha	1
Baton Rouge	1	**NEW HAMPSHIRE- 0.3%**	
Kenner	1	Sanbornville	1
OKLAHOMA- 0.8%		**PENNSYLVANIA- 0.3%**	
Bartlesville	1	Avalon	1
Bethany	1	**WEST VIRGINIA- 0.3%**	
Purcell	1	Sand Fork	1
VIRGINIA- 0.8%			
Gate City	1		
Reston	1	**INTERNATIONAL**	
Timberville	1	**CANADA**	
CONNECTICUT- 0.5%		Bagsværd	2
Harwinton	1	Atholville	1
S. Glastonbury	1	Cambridge	1
UTAH- 0.5%		East St Paul	1
South Jordan	1	Hamilton	1
Washington	1	Kingston	1
ALASKA- 0.3%		Port Franks	1
Anchorage	1	Riverview	1
DELAWARE- 0.3%		Ruscom	1
Wilmington	1	Saint John	1
IOWA- 0.3%		Stoney Creek	1
Davenport	1	Timmins	1
MASSACHUSETTS- 0.3%		Windsor	1
Newburyport	1		
MARYLAND- 0.3%			
Mount Airy	1		

Visitors Point of Origin – Summer

State - City									
TENNESSEE- 14.0%		Estill Springs	1	Watertown	1	Dublin	1	Sharpsburg	1
Murfreesboro	8	Fairview	1	Waynesboro	1	E. Dublin	1	Shellman	1
Nashville	6	Greenbrier	1	**GEORGIA- 12.9%**		Gainesville	1	Stone Mountain	1
Clarksville	5	Harriman	1	Canton	5	Gordon	1	Thomaston	1
Columbia	4	Hendersonville	1	Woodstock	4	Griffin	1	Tifton	1
Knoxville	4	Hermitage	1	Albany	3	Hamilton	1	Vidalia	1
Manchester	4	Jackson	1	Carrollton	3	Hapeville	1	Warm Springs	1
Morristown	3	Jackson	1	Douglasville	3	Hartwell	1	Whitesburg	1
Chattanooga	2	Jefferson City	1	Temple	3	Hoschron	1	**ALABAMA- 10.9%**	
Church Hill	2	Lawrenceburg	1	Villa Rica	3	Jackson	1	Gadsden	4
Cleveland	2	Lebanon	1	Atlanta	2	Jasper	1	Montgomery	4
Clinton	2	Lenoir City	1	Bonaire	2	Jefferson	1	Dothan	3
Dickson	2	Madisonville	1	Chickamauga	2	Jonesboro	1	Phenix City	3
Franklin	2	Martin	1	Conyers	2	Kathleen	1	Talladega	3
Knoxville	2	Monterey	1	Locust Grove	2	Lagrange	1	Cordova	2
Mcminnville	2	Mount Carmel	1	Mableton	2	Lawrenceville	1	Dora	2
Memphis	2	Mount Juliety	1	Marietta	2	Lenox	1	Jacksonville	2
Spring City	2	Old Hickory	1	Newnan	2	Lilburn	1	Northport	2
Springfield	2	Ooltewah	1	Stockbridge	2	Lindale	1	Tuscaloosa	2
Westmoreland	2	Parsons	1	Sugar Hill	2	Manchester	1	Altoona	1
Antioch	1	Pulaski	1	Acworth	1	Mcdonough	1	Ardmore	1
Bartlett	1	Rockvale	1	Bowdon	1	Midland	1	Ashford	1
Bon Aqua	1	Rockwood	1	Buford	1	Milner	1	Ashland	1
Charleston	1	Rogersville	1	Calhoun	1	Nashville	1	Attalla	1
Collierville	1	Sale Creek	1	Columbus	1	Plainville	1	Bessemer	1
Cornersville	1	Selmer	1	Cordele	1	Ringgold	1	Boaz	1
Crossville	1	Sevierville	1	Covington	1	Riverdale	1	Bremen	1
Decatur	1	Sparta	1	Cumming	1	Rockmart	1	Brent	1
Eads	1	Stewart	1	Dallas	1	Rome	1	Centreville	1
Eagleville	1	Wartburg	1	Dalton	1	Rossville	1	Childersburg	1

Visitors Point of Origin – Summer

State - City									
Cusseta	1	Sheffield	1	Floyds Knobs	1	Grove City	2	Mattoon	2
Eclectic	1	Shelby	1	Fort Wayne	1	Hamilton	2	Mendota	2
Elkmont	1	Springville	1	Francisco	1	Marshallville	2	Midlothian	2
Elmore	1	Stevenson	1	Franklin	1	Tipp City	2	Plainfield	2
Enterprise	1	Sumiton	1	Fredericksburg	1	Athens	1	Belknap	1
Eufaula	1	Sylacauga	1	Greencastle	1	Camden	1	Bluford	1
Florence	1	Union Grove	1	Greenwood	1	Canal Winchester	1	Breese	1
Ft Mitchell	1	Vincent	1	Hanover	1	Circleville	1	Cabery	1
Guntersville	1	Vinemont	1	Knightstown	1	Coshocton	1	Carterville	1
Hanceville	1	Warrior	1	Lafayette	1	Fairfield	1	Chadwick	1
Hokes Bluff	1	**INDIANA- 8.1%**		Lebanon	1	Franklin	1	Charleston	1
Hoover	1	Indianapolis	10	Madison	1	Georgetown	1	Chester	1
Hueytown	1	Newburgh	4	Mitchell	1	Lorain	1	Collinsville	1
Lester	1	Evansville	2	N. Manchester	1	Nashport	1	Cottage Hills	1
Mccalla	1	Fishers	2	North Vernon	1	Newark	1	Decatur	1
Mobile	1	Kokomo	2	Rising Sun	1	Norwalk	1	Divernon	1
Morris	1	Monticello	2	Stilesville	1	Ohio	1	East Peoria	1
Mount	1	Richmond	2	Vallonia	1	Pickerington	1	Fairfield	1
Mount Olive	1	Anderson	1	Velpen	1	Piketon	1	Fairveiw Heights	1
Mulga	1	Austin	1	Wadesville	1	Portsmouth	1	Glen Carbon	1
Muscle Shoals	1	Bedford	1	Washington	1	Reading	1	Goreville	1
Oneonta	1	Berne	1	W. Terre Haute	1	Springfield	1	Grafton	1
Opelika	1	Brownsburg	1	**OHIO- 7.9%**		Sycamore	1	Hillsboro	1
Pell City	1	Brownstown	1	Cincinnati	8	Tallmadge	1	Lemont	1
Phil Campbell	1	Centerville	1	Columbus	4	Troy	1	Loves Park	1
Pleasant Grove	1	Columbus	1	Trenton	4	Wilmington	1	Marion	1
Prattville	1	Commiskey	1	Bainbridge	3	**ILLINOIS- 6.9%**		Mchenry	1
Riverside	1	Corydon	1	Lancaster	3	Chicago	2	Murphysboro	1
Roanoke	1	Elberfeld	1	East Liverpool	2	Downers Grove	2	New Berlin	1
Semmes	1	Ferdinand	1	Elyria	2	Kewanee	2	New Haven	1

Visitors Point of Origin – Summer

State - City									
Newton	1	Kennett	1	Georgetown	1	Lexington	1	Shawnee	1
Orland Park	1	Lee's Summit	1	Grand Prairie	1	Liberty	1	Wagoner	1
Ottawa	1	Liberty	1	Hallsville	1	London	1	Wetumka	1
Robinson	1	Mansfield	1	Irving	1	Loretto	1	Wynnewood	1
Shelbyville	1	Neosho	1	Lavon	1	Madisonville	1	Yukon	1
St. Jacob	1	Otterville	1	Leander	1	Marion	1	**ARKANSAS- 2.5%**	
Sycamore	1	Pacific	1	Longview	1	Maysville	1	Little Rock	2
Trenton	1	Park Hills	1	Marlin	1	Monticello	1	Van Buren	2
Wayne City	1	Portageville	1	Plano	1	Mt Sterling	1	Alexander	1
MISSOURI- 5.9%		Rocheport	1	Rockwall	1	Paducah	1	Alpena	1
Springfield	3	Rogersville	1	San Antonio	1	Pewee Valley	1	Conway	1
St. Louis	3	St Peters	1	Texarkana	1	Pikeville	1	Corning	1
Elsberry	2	Warrensburg	1	Tyer	1	Princeton	1	DeWitt	1
Fulton	2	**TEXAS- 5.3%**		Utopia	1	Providence	1	Fort Smith	1
Kansas City	2	Richmond	3	Whitehouse	1	Shelbyville	1	Greenbrier	1
New Haven	2	Alvord	2	**KENTUCKY- 5.0%**		Shepherdsville	1	Marianna	1
Poplar Bluff	2	Arlington	2	Louisville	4	Stanford	1	Paragould	1
Ballwin	1	Denton	2	Bedford	1	Tompkinsville	1	POTTSVILLE	1
Blue Springs	1	Fort Worth	2	Benton	1	Whitesburg	1	Poughkeepsie	1
Bonne Terre	1	Houston	2	Big Clifty	1	**OKLAHOMA- 2.7%**		Searcy	1
Bonnots Mill	1	Alice	1	Bowling Green	1	Oklahoma City	3	Springdale	1
Bridgeton	1	Allen	1	Burlington	1	Mustang	2	West Memphis	1
Cainsville	1	Austin	1	Covington	1	Tulsa	2	**LOUISIANA- 2.5%**	
Cape Girardeau	1	Bullard	1	Cynthiana	1	Choctaw	1	Ferriday	2
Chesterfield	1	Burleson	1	Danville	1	Comanche	1	Metairie	2
Crocker	1	Canton	1	Frankfort	1	Edmond	1	Minden	2
Dardenne Prairie	1	Deer Park	1	Glasgow	1	Heavener	1	Alexandria	1
Festus	1	Euless	1	Glencoe	1	Inola	1	Ball	1
Independence	1	Forney	1	Henderson	1	Norman	1	Baton Rouge	1
Jefferson City	1	Fulshear	1	Hyden	1	Piedmont	1	Broussard	1

Visitors Point of Origin – Summer

State - City									
Darrow	1	Orlando	1	Wisconsin Dells	1	Lansdale	1	**NEBRASKA- 0.1%**	
Lafayette	1	**SOUTH CAROLINA- 1.5%**		**IOWA- 0.8%**		**WEST VIRGINIA- 0.6%**		Waterloo	1
Natchitoches	1	Abbeville	1	Cedar Rapids	4	Delbarton	1		
New Orleans	1	Charleston	1	Coon Rapids	1	Harts	1		
Pierre Part	1	Clover	1	Ottumwa	1	Ripley	1	**INTERNATIONAL**	
Tickfaw	1	Columbia	1	**KANSAS- 0.8%**		St Albans	1	**CANADA**	
Tullos	1	Duncan	1	Olathe	2	**MICHIGAN- 0.4%**		Ottawa	2
West Monroe	1	fountain inn	1	Atchison	1	Kalamazoo	1	Barrie	1
MISSISSIPPI- 2.2%		Greenwood	1	Baldwin City	1	New Baltimore	1		
Jackson	3	Lugoff	1	Overland Park	1	Portage	1		
Gautier	2	Prosperity	1	Randolph	1	**CALIFORNIA- 0.3%**			
Hamilton	2	Simpsonville	1	**VIRGINIA- 0.8%**		Alameda	2		
Booneville	1	Taylors	1	Glade Spring	2	**COLORADO- 0.3%**			
Byhalia	1	**NORTH CAROLINA- 1.4%**		Fairfax	1	Aurora	1		
Iuka	1	Burnsville	2	Falls Church	1	Ignacio	1		
Kosciusko	1	Murphy	2	Roanoke	1	**MASSACHUSETTS- 0.3%**			
Lucedale	1	Charlotte	1	Wise	1	Fall River	1		
Mantachie	1	Conover	1	**MINNESOTA- 0.8%**		Weymouth	1		
Meridian	1	Lincolnton	1	Blaine	1	**MARYLAND- 0.3%**			
Olive Branch	1	Mooresville	1	Minnetonka	1	Chesapeake Bch	1		
Tupelo	1	Rutherfordton	1	Moose lake	1	Lexington Park	1		
FLORIDA- 1.8%		Weaverville	1	White Bear Lake	1	**NEW MEXICO- 0.3%**			
Tallahassee	5	**WISCONSIN- 1.1%**		**NEW YORK- 0.8%**		Edgewood	1		
Chipley	1	Burlington	1	Prattsburgh	2	Taos	1		
Crawfordville	1	Franklin	1	Buffalo	1	**SOUTH DAKOTA- 0.3%**			
Davenport	1	Genoa City	1	Suffolk	1	Brandon	1		
Deltona	1	Hubertus	1	**PENNSYLVANIA- 0.6%**		Sioux Falls	1		
Fort White	1	Milwaukee	1	Bethlehem	1	**CONNECTICUT- 0.1%**			
Gainesville	1	Racine	1	Bridgeville	1	Old Lyme	1		
Haines City	1	Tomahawk	1	Ebensburg	1				

Visitors Point of Origin – Summer

State - City											
GEORGIA- 14.9%		Jasper	1	Beechgrove	2	Mt. Juliet	1	Gadsden	1
Rome	3	Jonesboro	1	Chattanooga	2	Orlinda	1	Hartselle	1
Villa Rica	3	Kathleen	1	Cleveland	2	Rockvale	1	Hoover	1
Columbus	2	Kennesaw	1	Columbia	2	Rutherford	1	Huntsville	1
Dalton	2	Lawrenceville	1	Germantown	2	Smyrna	1	Jacksonville	1
Douglasville	2	Leesburg	1	Lebanon	2	South Fulton	1	Jasper	1
Griffin	2	Loganville	1	Lewisburg	2	Sparta	1	Leesburg	1
Hogansville	2	Mableton	1	Murfreesboro	2	Summertown	1	Monroeville	1
Pendergrass	2	Macon	1	Portland	2	Troy	1	Nauvoo	1
Warner Robins	2	Marietta	1	Ripley	2	**ALABAMA- 11.8%**		Opelika	1
Williamson	2	McDonough	1	Sevierville	2	Dothan	5	Opp	1
Winder	2	McIntyre	1	Waverly	2	Birmingham	3	Ozark	1
Acworth	1	Monroe	1	Allardt	1	Athens	2	Pinson	1
Americus	1	Oglethorpe	1	Ardmore	1	Blountsville	2	Salem	1
Atlanta	1	Pooler	1	Atoka	1	Cullman	2	Somerville	1
Augusta	1	Ringgold	1	Chestnut Mound	1	Hueytown	2	Troy	1
Calhoun	1	Rossville	1	Clarksville	1	Montgomery	2	Trussville	1
Carrollton	1	Sandy Springs	1	Clinton	1	Tuscaloosa	2	Valley	1
Chatsworth	1	Senoia	1	Crossville	1	Alabaster	1	Warrior	1
Coolidge	1	Stockbridge	1	Dunlap	1	Alpine	1	Wilsonville	1
Cumming	1	Stone Mountain	1	Eads	1	Calera	1	Woodstock	1
Dallas	1	Sumner	1	Gallatin	1	Clanton	1	**INDIANA- 9.6%**	
Ellenwood	1	Thomasville	1	Hixson	1	Crossville	1	Evansville	8
Folkston	1	Waco	1	Kingsport	1	Danville	1	Terre Haute	4
Fortson	1	Woodstock	1	Lavergne	1	Deatsville	1	Nashville	3
Gainesville	1	**TENNESSEE- 14.7%**		Lenoir City	1	Decatur	1	Avon	2
Grayson	1	Knoxville	5	Louisville	1	Double Springs	1	Camby	2
Hamilton	1	Nashville	4	Madison	1	Elba	1	Greenwood	2
Hull	1	Maryville	3	Millington	1	Enterprise	1	Indianapolis	2
Jackson	1	Memphis	3	Mount Carmel	1	Fairhope	1	Pendleton	2

Visitors Point of Origin – Fall

State - City									
GEORGIA- 14.9%		Jasper	1	Beechgrove	2	Mt. Juliet	1	Gadsden	1
Rome	3	Jonesboro	1	Chattanooga	2	Orlinda	1	Hartselle	1
Villa Rica	3	Kathleen	1	Cleveland	2	Rockvale	1	Hoover	1
Columbus	2	Kennesaw	1	Columbia	2	Rutherford	1	Huntsville	1
Dalton	2	Lawrenceville	1	Germantown	2	Smyrna	1	Jacksonville	1
Douglasville	2	Leesburg	1	Lebanon	2	South Fulton	1	Jasper	1
Griffin	2	Loganville	1	Lewisburg	2	Sparta	1	Leesburg	1
Hogansville	2	Mableton	1	Murfreesboro	2	Summertown	1	Monroeville	1
Pendergrass	2	Macon	1	Portland	2	Troy	1	Nauvoo	1
Warner Robins	2	Marietta	1	Ripley	2	**ALABAMA- 11.8%**		Opelika	1
Williamson	2	McDonough	1	Sevierville	2	Dothan	5	Opp	1
Winder	2	McIntyre	1	Waverly	2	Birmingham	3	Ozark	1
Acworth	1	Monroe	1	Allardt	1	Athens	2	Pinson	1
Americus	1	Oglethorpe	1	Ardmore	1	Blountsville	2	Salem	1
Atlanta	1	Pooler	1	Atoka	1	Cullman	2	Somerville	1
Augusta	1	Ringgold	1	Chestnut Mound	1	Hueytown	2	Troy	1
Calhoun	1	Rossville	1	Clarksville	1	Montgomery	2	Trussville	1
Carrollton	1	Sandy Springs	1	Clinton	1	Tuscaloosa	2	Valley	1
Chatsworth	1	Senoia	1	Crossville	1	Alabaster	1	Warrior	1
Coolidge	1	Stockbridge	1	Dunlap	1	Alpine	1	Wilsonville	1
Cumming	1	Stone Mountain	1	Eads	1	Calera	1	Woodstock	1
Dallas	1	Sumner	1	Gallatin	1	Clanton	1	**INDIANA- 9.6%**	
Ellenwood	1	Thomasville	1	Hixson	1	Crossville	1	Evansville	8
Folkston	1	Waco	1	Kingsport	1	Danville	1	Terre Haute	4
Fortson	1	Woodstock	1	Lavergne	1	Deatsville	1	Nashville	3
Gainesville	1	**TENNESSEE- 14.7%**		Lenoir City	1	Decatur	1	Avon	2
Grayson	1	Knoxville	5	Louisville	1	Double Springs	1	Camby	2
Hamilton	1	Nashville	4	Madison	1	Elba	1	Greenwood	2
Hull	1	Maryville	3	Millington	1	Enterprise	1	Indianapolis	2
Jackson	1	Memphis	3	Mount Carmel	1	Fairhope	1	Pendleton	2

Visitors Point of Origin – Fall

State - City									
Peru	2	Franklin	1	West Chester	1	Wheaton	1	Naples	1
South Bend	2	Hopkinsville	1	Westerville	1	**MISSOURI- 6.2%**		Rosenberg	1
Borden	1	La Grange	1	Wilmington	1	St. Louis	3	San Antonio	1
Ellettsville	1	Nortonville	1	**ILLINOIS- 6.9%**		Camdenton	2	**FLORIDA- 2.4%**	
Fishers	1	Owensboro	1	Robinson	3	Imperial	2	Tallahassee	2
Fort Wayne	1	Versailles	1	Shiloh	2	Maryland Hgts	2	Bonifay	1
Frankton	1	Winchester	1	Westmont	2	Oak Grove	2	Crawfordville	1
Georgetown	1	**OHIO- 7.1%**		Antioch	1	Saint Louis	2	Ellenton	1
Greencastle	1	Chillicothe	3	Beecher	1	Warrensburg	2	Gainesville	1
Jasonville	1	Canton	2	Benton	1	Bridgeton	1	Greensboro	1
Madison	1	Cincinnati	2	Bolingbrook	1	Columbia	1	Havana	1
Newburgh	1	Franklin	2	Carlyle	1	Farmington	1	Port St Joe	1
Osgood	1	Gahanna	2	Carterville	1	Florissant	1	Rotonda West	1
Shelbyville	1	Sidney	2	Chana	1	Fordland	1	Saint Johns	1
Vincennes	1	Bellbrook	1	Colona	1	Fredericktown	1	**IOWA- 1.6%**	
Wadesville	1	Canal Winchester	1	Dallas City	1	Hannibal	1	Coralville	2
KENTUCKY- 7.6%		Cheshire	1	Du Quoin	1	Jefferson City	1	Forest City	2
Louisville	6	Elyria	1	Harrisburg	1	Kansas City	1	Altoona	1
Lexington	4	Galloway	1	Johnsburg	1	Lees Summit	1	Keokuk	1
Bowling Green	3	Lancaster	1	Joliet	1	Raytown	1	Marion	1
Henderson	3	Macedonia	1	Mattoon	1	Salem	1	**MICHIGAN- 1.3%**	
Flatwoods	2	New Carlisle	1	Peoria	1	St Peters	1	Bangor	1
Frankfort	2	N. Philadelphia	1	Pocahontas	1	**TEXAS- 2.7%**		Dowagiac	1
Ashland	1	Newark	1	Prospect Heights	1	Dallas	2	Fraser	1
Bardstown	1	North Canton	1	Sauk Village	1	McKinney	2	Petoskey	1
Beaver Dam	1	Pataskala	1	Shipman	1	Arlington	1	Romulus	1
Benton	1	Portsmouth	1	South Elgin	1	Dale	1	Waterford	1
Brandenburg	1	Springfield	1	Streamwood	1	Euless	1	**LOUISIANA- 1.1%**	
Campbellsville	1	St. Mary's	1	Waterloo	1	Fort Worth	1	Alexandria	1
Cox's Creek	1	Thornville	1	West Frankfort	1	Lewisville	1	Monterey	1

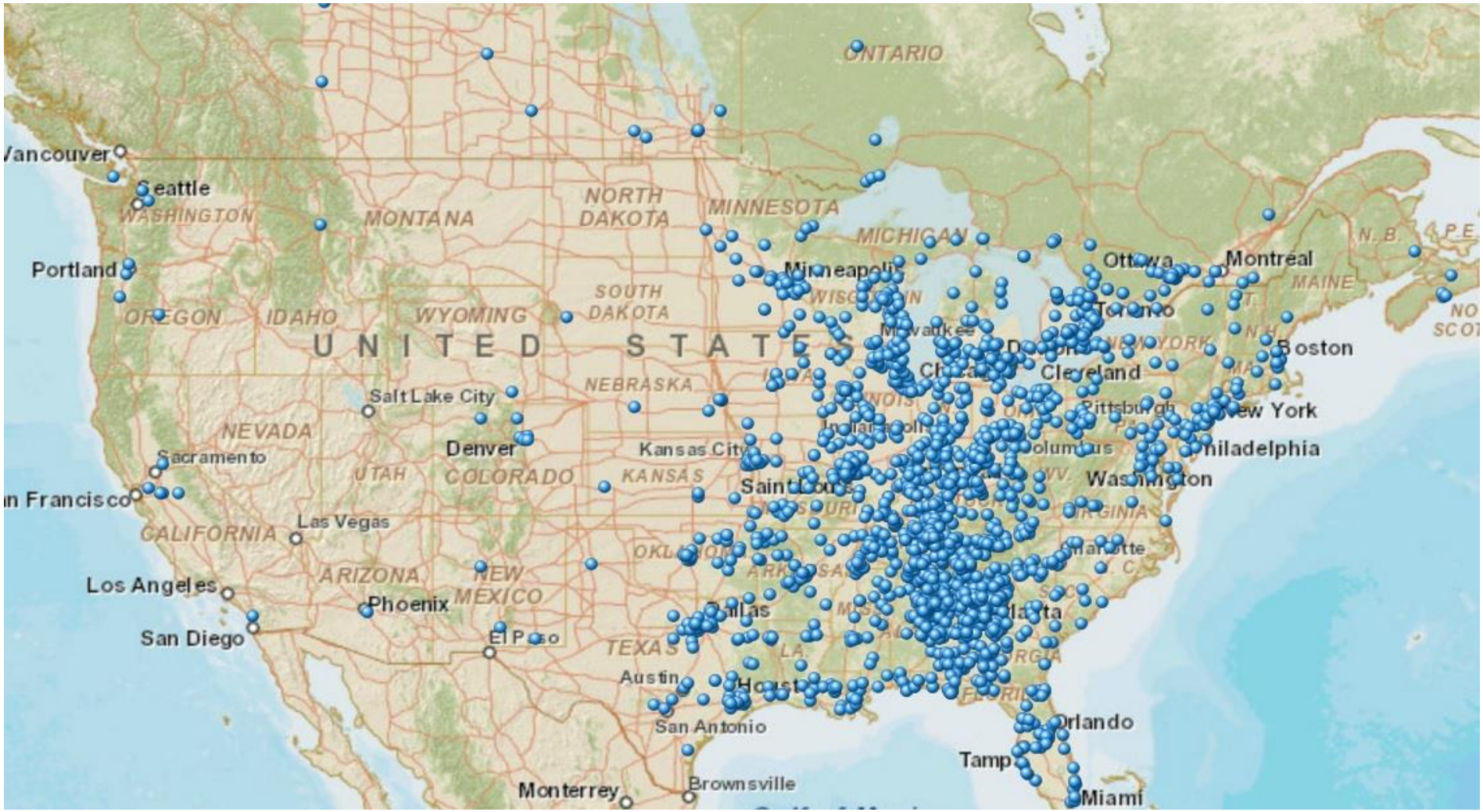
Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

Visitors Point of Origin – Fall

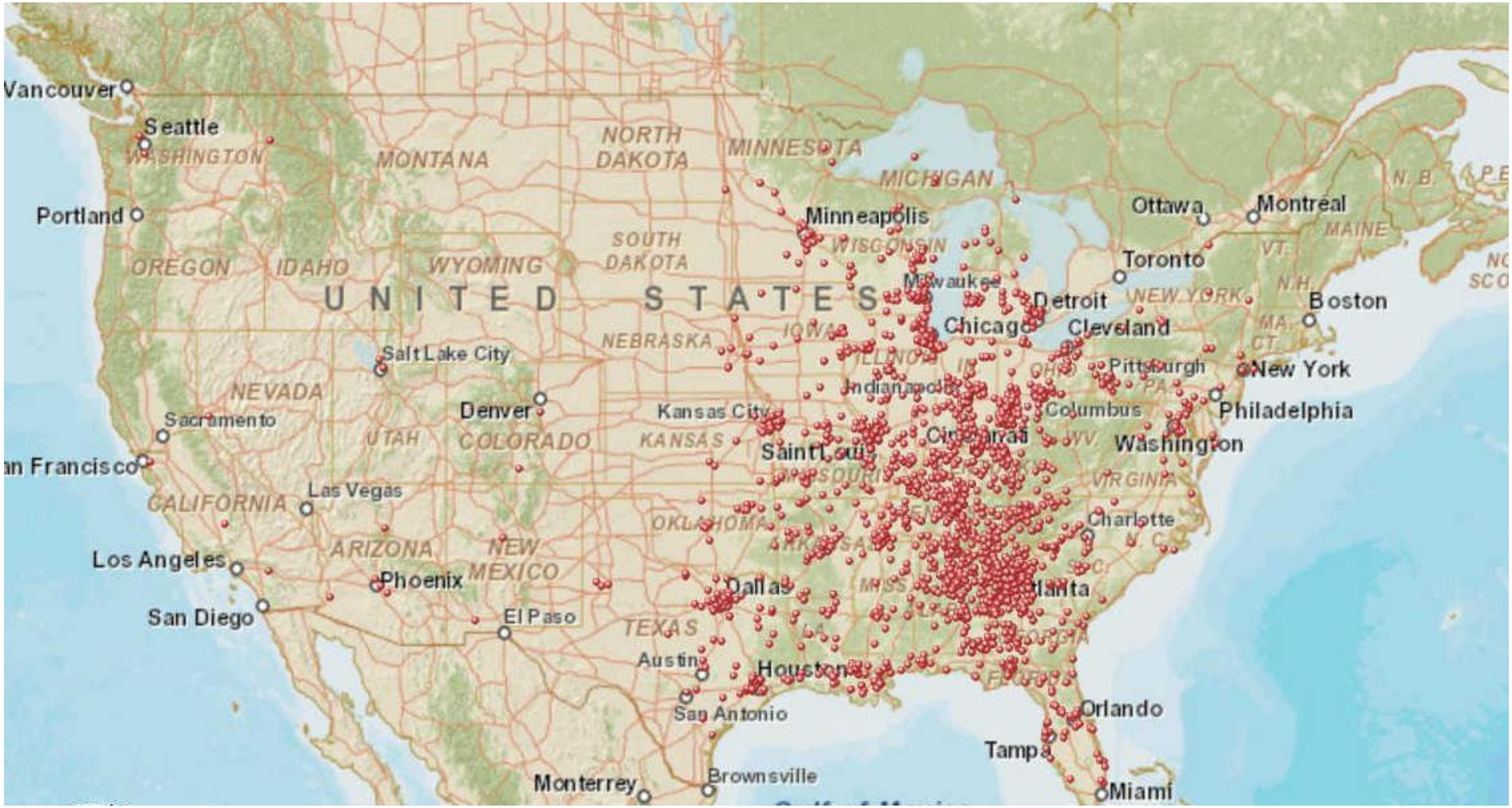
State - City					
New Orleans	1	**PENNSYLVANIA- 0.9%**		**COLORADO- 0.2%**	
Saint Amant	1	Flourtown	1	Littleton	1
West Monroe	1	Littlestown	1	**CONNECTICUT- 0.2%**	
MONTANA- 1.1%		Pittsburgh	1	Baltic	1
Fergus Falls	2	Wrightsville	1	**MARYLAND- 0.2%**	
Hillman	1	**KANSAS- 0.7%**		Lusby	1
Lakeville	1	Gardner	1	**NEBRASKA- 0.2%**	
St. Paul	1	Louisburg	1	Omaha	1
MISSISSIPPI- 1.1%		Overland Park	1	**NEW JERSEY- 0.2%**	
Brandon	1	**NEW YORK- 0.7%**		Marlton	1
Horn Lake	1	Brooklyn	2	**NEVADA- 0.2%**	
Houston	1	Clay	1	Las Vegas	1
Meridian	1	**SOUTH CAROLINA- 0.7%**		**OREGON- 0.2%**	
Olive Branch	1	Inman	1	Toledo	1
NORTH CAROLINA- 1.1%		Irmo	1	**WASHINGTON- 0.2%**	
Asheville	1	Ware Shoals	1	Maple Valley	1
Candler	1	**DELAWARE- 0.4%**			
Graham	1	Bear	2		
Greensboro	1	**VIRGINIA- 0.4%**		**INTERNATIONAL**	
Kings Mountain	1	Fredericksburg	1	**CANADA**	
OKLAHOMA- 1.1%		Gladstone	1	Bathurst	1
Oklahoma City	2	**WISCONSIN- 0.4%**		Kenora	1
Collinsville	1	Cudahy	1	Kitchener	1
Fairview	1	Janesville	1	Toronto	1
Norman	1	**WEST VIRGINIA- 0.4%**		Vaudreuil-Dorion	1
ARKANSAS- 0.9%		Harts	1	Weirdale	1
Alexander	1	Shepherdstown	1	**UNITED KINGDOM**	
Beebe	1	**ARIZONA- 0.2%**		Lowestoft	1
Mcgehee	1	Tucson	1		
Sherwood	1				

Note: Fall data represents visitors to PCB September 1 – October 8, 2018 prior to Hurricane Michael

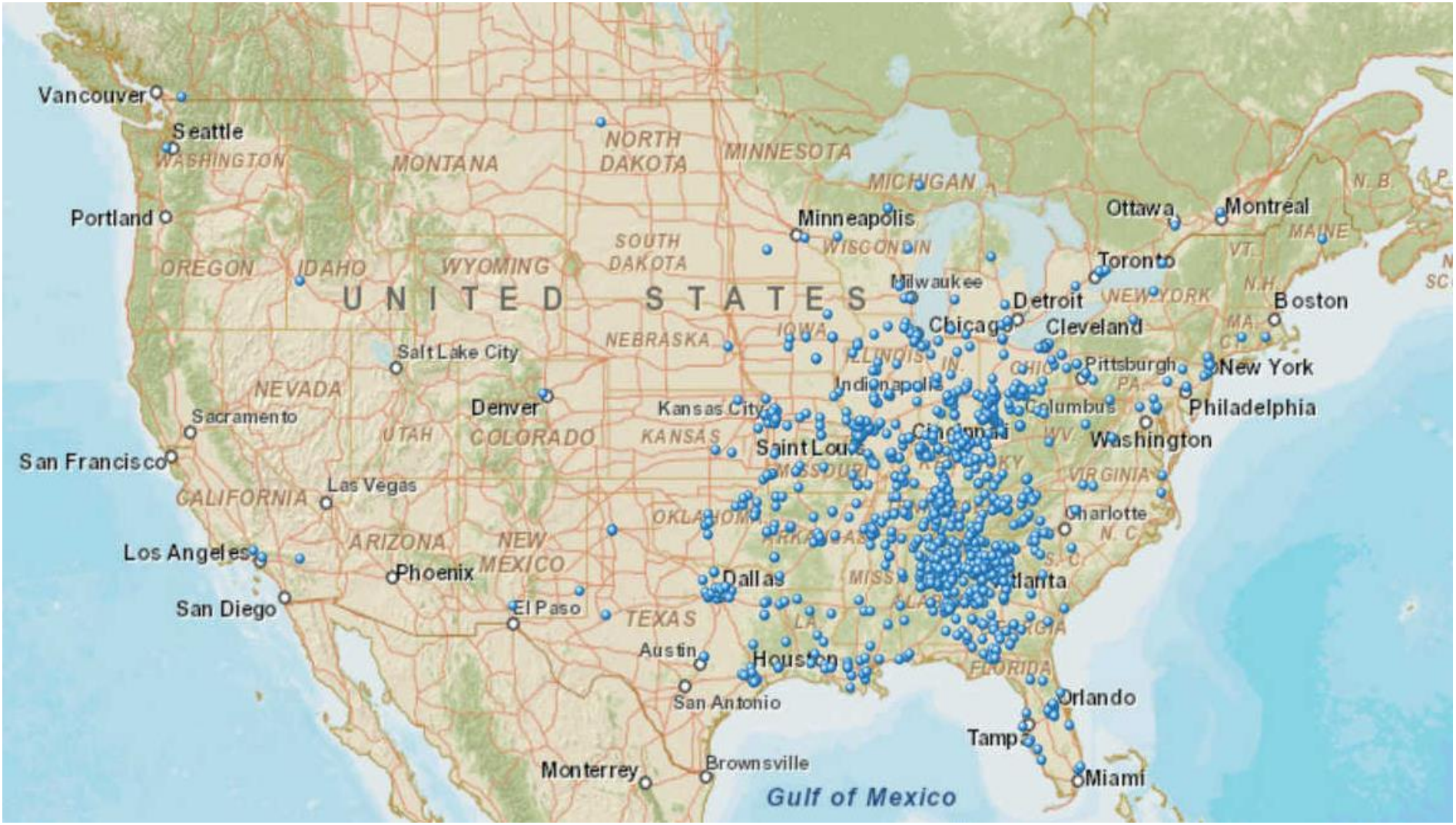
2013 Visitor Survey Respondents Map



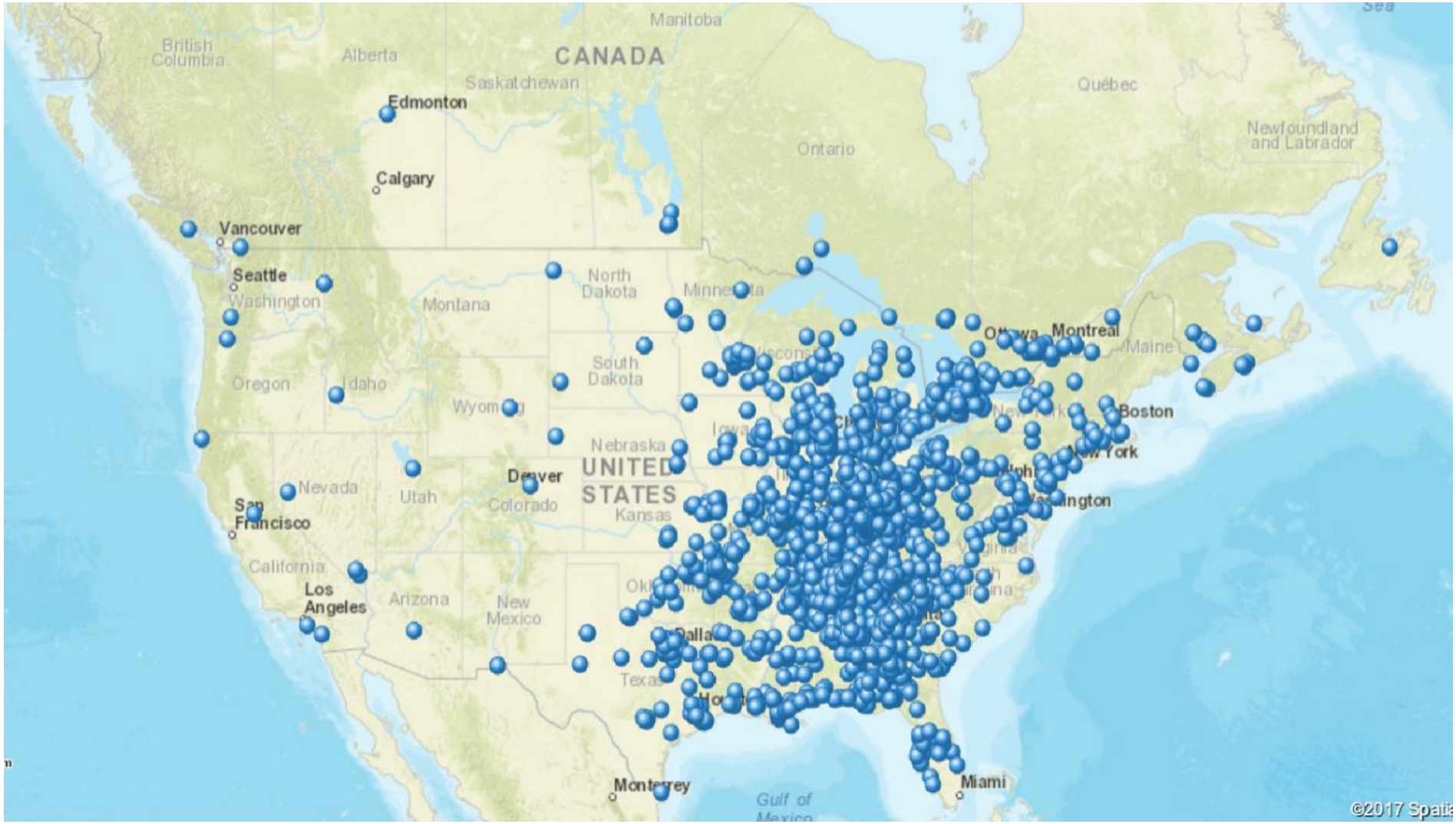
2014 Visitor Survey Respondents Map



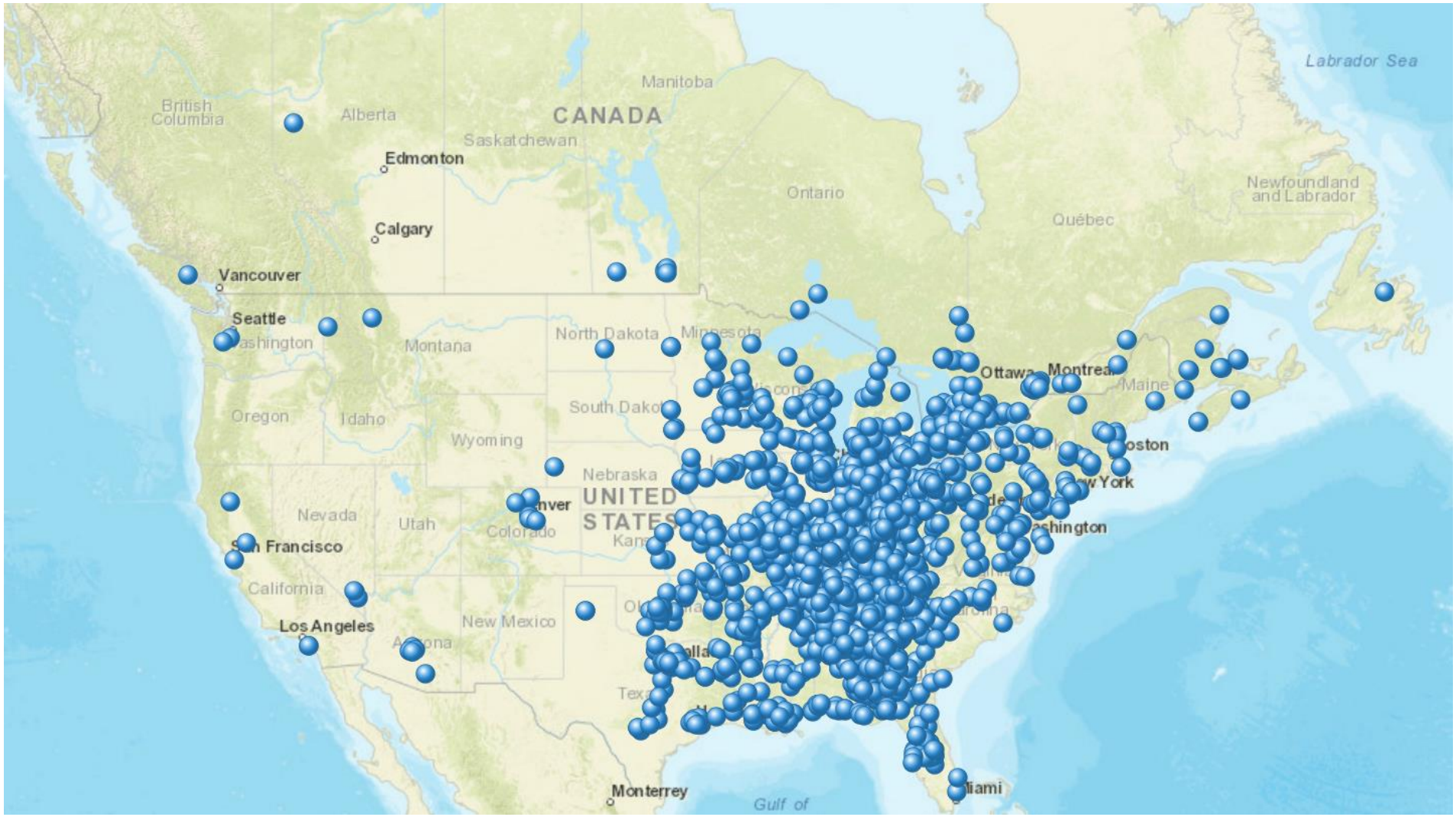
2015 Visitor Survey Respondents Map



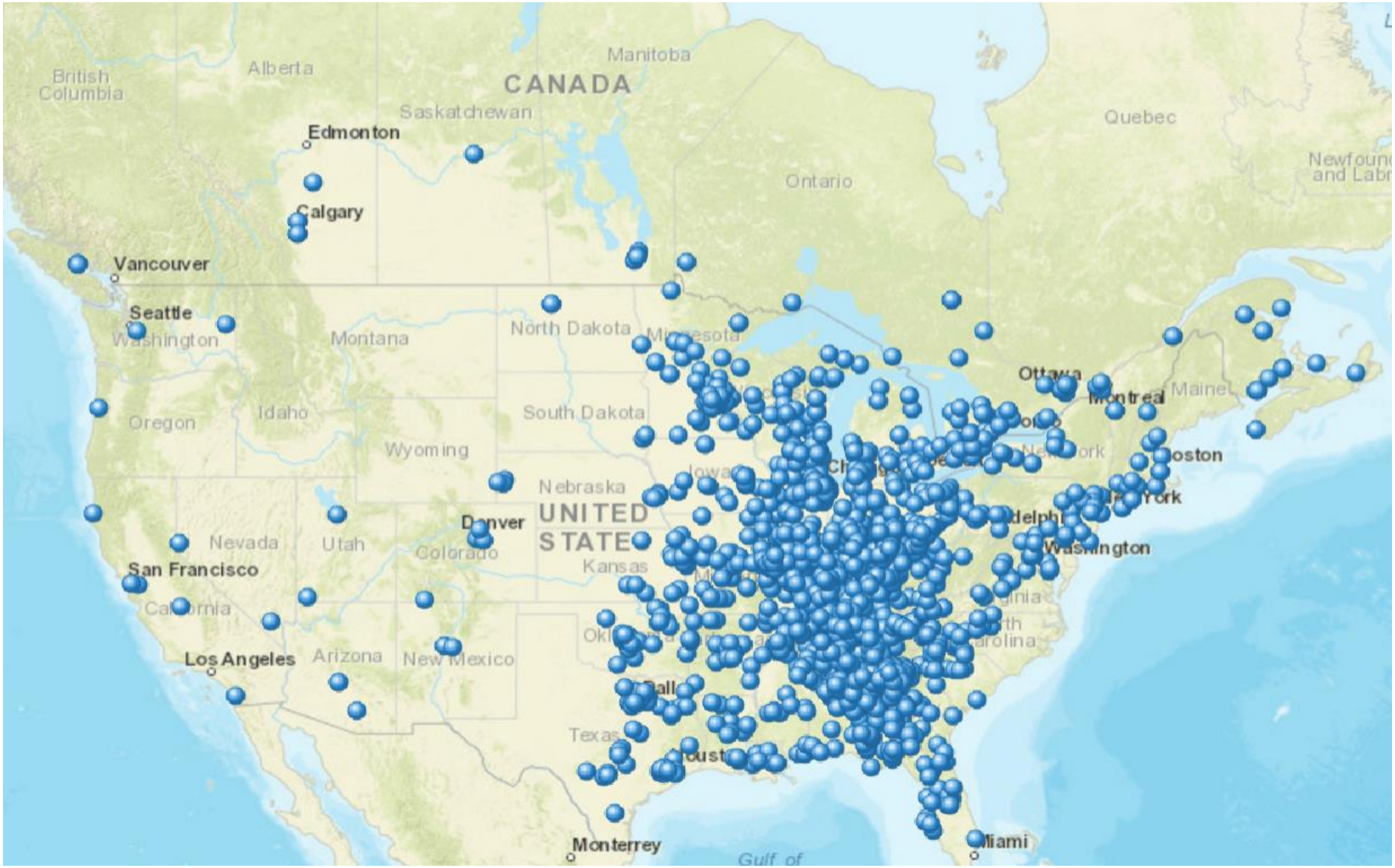
2016 Visitor Survey Respondents Map



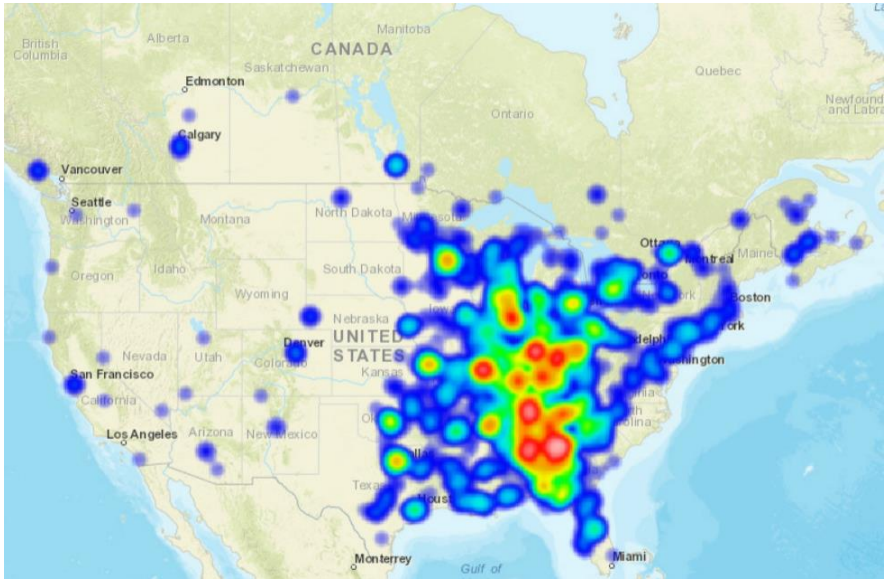
2017 Visitor Survey Respondents Map



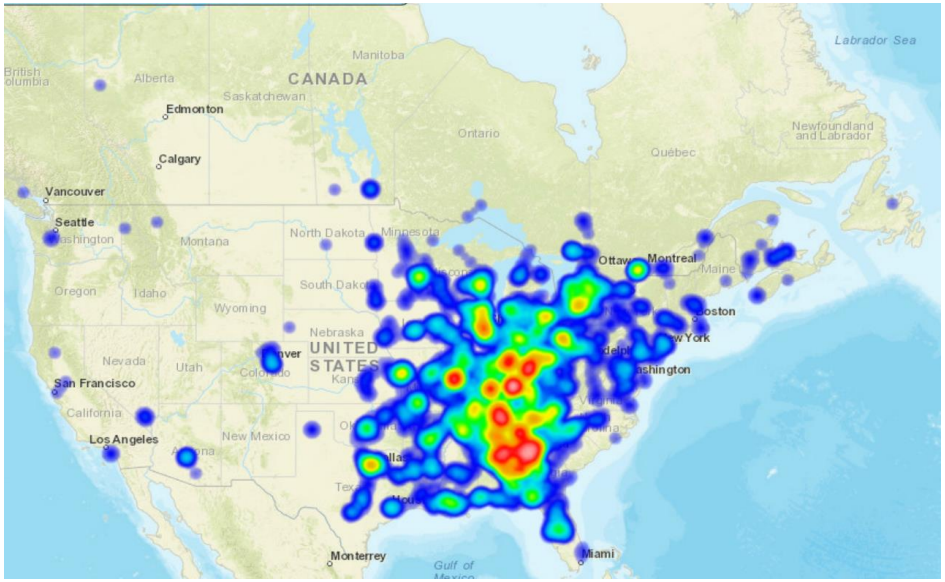
2018 Visitor Survey Respondents Map



2018 Visitor Survey Respondents Heat Map



2017 Visitor Survey Respondents Heat Map



Young Strategies, Inc.
Research Team Experience

Panama City Beach Convention & Visitors Bureau
Young Strategies 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 150 DMOs in thirty-two states. YSI's approach is to custom tailor each research study to the specific needs of the destination. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, rural tourism development and convention center management.

BERKELEY YOUNG, PRESIDENT, YOUNG STRATEGIES – 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 visitor's 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. Young is a top rated speaker at regional and national conferences. As the project team leader Berkeley Young will serve as the primary client contact and chief strategist. Young's experience as a hotelier uniquely qualifies him to lead lodging market analyses for destinations. The total research methodology will be tailored to the unique needs of the destination and actionable strategies will be developed from the resulting data and community leader input. Young is known for his consensus building, active listening and thoughtful consideration when developing a plan for a community.

AMY STEVENS, VICE PRESIDENT, YOUNG STRATEGIES – RESEARCH OVERSIGHT

More than 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/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. In 2017 Stevens earned the Certified Hotel Industry Analyst (CHIA) certification from STR and AHLA. Stevens will take the research lead on this market research study to keep all steps in the process on schedule and well organized to deliver maximum results for the client.

MCKENZIE GRAHAM, YOUNG STRATEGIES – RESEARCH COORDINATOR

A University of South Carolina graduate, McKenzie has been with Young Strategies for the last 3 years as Office Manager and Research Coordinator. McKenzie specializes in running the office, data analysis, compilation and report development.

MADEYLYN MATLOCK, YOUNG STRATEGIES – RESEARCH ANALYST

A University of North Carolina Wilmington graduate, Madelyn has been with Young Strategies for the last 3 years as a Research Coordinator and Analyst. Madelyn specializes in survey instrument development, data collection, lodging data analysis and report development.

LARRY GUSTKE, PHD, PROFESSOR EMERITUS NC STATE UNIVERSITY

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. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience with destinations across America. 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 many academic and professional networks related to tourism research.