



AGENDA
COMBINED BOARD MEETING
Bay County Tourist Development Council
Panama City Beach Convention & Visitors Bureau, Inc.
Panama City Beach
9:00 a.m.

Tuesday, May 09, 2023

Council Room, PCB City Hall

- I. CALL MEETING TO ORDER**
- II. ROLL CALL**
 - A. Invocation
 - B. Pledge of Allegiance
 - C. Approve February & March 2023 minutes
- III. REQUESTS TO ADDRESS THE BOARD ON AGENDA ITEMS (3 Minutes)**
- IV. CONSENT AGENDA**
 - A. Acknowledge Receipt of the March 2023 Tourist Development Tax Collection Report
- V. PRESENTATION ITEMS**
 - A. FY 2023 Revenues, Mr. Dan Rowe
 - B. SABRE Center Update, Mr. Dan Rowe
 - C. Visitor Profile Winter 2022-2023 Report, Mr. Berkley Young
- VI. PRESIDENTS REPORT**
- VII. CHAIRMAN'S REPORT**
- VIII. AUDIENCE PARTICIPATION**
- IX. ADJOURNMENT**

MOTIONS PASSED AT THE COMBINED BOARD MEETING, Tuesday, February 14, 2023

Approved Nov & Dec 2022, & Jan 2023 Minutes
Mr. Patronis/Ms. Pease

Approved Consent Agenda
Ms. Pease/Mr. Wilkes

Approved Action Item A
Ms. Pease/ Mr. Walsingham

Approved Action Item B
Ms. Pease/Mr. Patronis

Approved Waiver of Conflict
Ms. Pease/ Mr. Walsingham

COMBINED BOARD MEETING
Bay County Tourist Development Council
Panama City Beach Convention & Visitors Bureau, Inc.
Panama City Beach

Tuesday, February 14, 2023

9:00 a.m.

Council Room, PCB City Hall

I. CALL MEETING TO ORDER

Chairman Chester called the meeting to order at 9:00 a.m.

II. ROLL CALL

Seven Members Present
Mr. Phillips Absent
(one Board position vacant)

A. Invocation

Mr. Wilkes gave the Invocation.

B. Pledge of Allegiance

Ms. Pease led the Pledge of Allegiance.

C. Approve Nov. & Dec. 2022 & Jan., 2023 Minutes

Mr. Patronis moved; seconded by Ms. Pease to approve the Minutes.

Motion passed unanimously

III. REQUESTS TO ADDRESS THE BOARD ON AGENDA ITEMS (3 Minutes)

None

IV. CONSENT AGENDA

A. Acknowledge Receipt of the September 2022 Quarterly Financial Report

B. Acknowledge Receipt of the December 2022 Tourist Development Tax Collection Report

Ms. Pease moved; seconded by Mr. Wilkes to approve the Consent Agenda.

Motion passed unanimously

V. ACTION ITEMS

A. Approve Task Order 5 MRD Associates/Dewberry for the Panama City Beaches 2023 One-Year Post-Construction Monitoring Surveys

Ms. Lisa Armbruster reviewed the task order for MRD Assoc., & Dewberry that is required by the permit for Spring 2023.

Ms. Pease moved; seconded by Mr. Walsingham to approve Action Item A.

Motion passed unanimously

B. Approve Task Order 5 CPE/APTIM for the Panama City Beaches 2023 One-Year Post-Construction Coastal Engineering Analysis and Engineering Monitoring Report

Ms. Lisa Armbruster reviewed the task order for CPE & APTIM required by permit.

**Ms. Pease moved; seconded by Mr. Patronis to approve Action Item B.
Motion passed unanimously**

VI. PRESENTATIONS

A. Panama City Beaches Offshore Sand Source Desktop Study with Recommendations and Strategy for the Future, Lisa Armbruster, Sustainable Beaches, Tara Brenner, PG, PE, Quin Robertson, Ph.D., PG, Coastal Protection Engineering, and Beau Suthard, PG, APTIM

Ms. Armbruster discussed how they plan to move forward and encouraged the board to ask questions and give guidance on what is expected. Ms. Tara Brenner discussed the sand search investigation goals. She stated that finding sand borrow areas and having those areas permitted is necessary to be able to act quickly when a need arises. She also said that meeting state requirements for quality and performance. She said that environmental and permitting restrictions are high so finding those areas to borrow from is very important. She reviewed the currently permitted borrow areas and the amount of available sand to borrow from.

The desktop study was discussed including state requirements and the geology of the borrow areas. Also discussed, the fiber core technology being used to reduce the amount of shell content and the use of the extraction method to extract the shell content.

Board members asked questions and discussed the borrow areas and the process. Ms. Pease asked about using the sand that will come from opening the East Pass. Ms. Armbruster said they are working with the company on that project for that reason.

B. 2022 Annual Visitor Profile and Economic Impact Results, Berkeley Young

Mr. Young reviewed the 2022 Visitor profiles and data that drove business and the results that had on the local economy.

Mr. Young answered questions from the board members regarding the data discussed. Mr. Rowe also discussed the shoulder season's activities that have greatly increased visitation during those times. Ms. Leach answered marketing questions and discussed campaigns for the upcoming seasons. Mr. Rowe said that after the pandemic, we held 96 percent of visitation and revenue due to our marketing efforts and we are continuing to grow the shoulder seasons. He also said that once the road construction is finished, we can then address the light and landscaping with discussion starting now.

VII. PRESIDENTS REPORT

Mr. Rowe stated that Ms. Pease, in her roll as a county commissioner, has been working on public outreach and public safety. Redesign of PCB Currents webpage to include QR codes to be able to access the flag system and Leave no Trace, as well as evacuation routes should a storm approach. Also, she has asked for the CVB to help bridge the need for a way for private partners to donate towards our parks for improvements. Mr. Rowe stated that he is having discussions with St Joe company regarding this issue.

Mr. Rowe also asked the board to vote on a Legal Waiver of Conflict because Mr. Sale's Firm represents the City of Panama City Beach as well as the TDC on the special events memorandum of understanding for both parties.

Approve Waiver of Conflict

Ms. Pease moved; seconded by Mr. Walsingham to approve.

Motion passed unanimously

Mr. Rowe then discussed the large Instagram sign at the sports park has rust and other issues. He said Mr. Chester's company was the only one that submitted a bid, and he wanted to let them know that out of full transparency and in the public.

He thanked Mr. Moore for serving on the board and said that other collectors will be reviewed and appointed by the county.

He stated that the architects for the indoor sports center will be in the office and they are welcome to come meet with them by appointment.

Mr. Rowe discussed the Fun for All accessibility campaign as well as Mr. Bailey's work with the Adaptable Diver group. He said this is an example of our outreach effort that is growing. He discussed the artificial reef program as well. He said that the growth in our revenue has allowed the focus of our strategic plan on how to create new and current special events sponsorships. Those sponsorships transition to reimbursement of marketing costs.

He also discussed our support of Eco-Tourism projects such as the Econfina Creek kayak launch due to its relationship to Eco-Tourism. And that he will continue to support such projects with the boards support. The st Andrews school will be developed as a cultural arts center will help us address community needs as well as tourism.

Also, the gateway experience to increase visual appeal is being addressed. Areas have been identified and the project is currently out to bid. And, the type of signs that go over the roadway on Hwy 79 and the foot of the Hathaway bridge are being discussed.

He also stated that the board has approved for a large-scale installation outside of our building which will be a great place for social media pictures by visitors.

Mr. Walsingham asked if we were going to be involved with the artificial reef that will be done in the gulf between us and Destin. Mr. Rowe stated that we would partner with Okaloosa County on the short term, and will be focused on creating other opportunities for more local dive spots. He said that there is a discussion regarding creating a resort/dive spot within the bay.

VIII. CHAIRMAN'S REPORT

Mr. Chester said he submitted the necessary paperwork to the Supervisor of Elections for his company to do the work at the sports park.

He noted that the PCB Police Chief was present and asked if the board had any questions for him. Mr. Rowe stated that the CVB will be sponsoring a luncheon for the spring break meeting of law enforcement as part of our community appreciation for their work. This meeting will include law enforcement from other counties and states regarding PCB spring break. The chief thanked the CVB for their support.

IX. AUDIENCE PARTICIPATION
NONE

X. ADJOURNMENT

Respectfully submitted,
Sharon Cook, Recording Secretary

MOTIONS PASSED AT THE COMBINED BOARD MEETING, Tuesday, March 14, 2023

Approved Consent Agenda
Mr. Walsingham / Ms. Pease

Approved Strategic Plan
Mr. Walsingham / Mr. Patronis

COMBINED BOARD MEETING
Bay County Tourist Development Council
Panama City Beach Convention & Visitors Bureau, Inc.
Panama City Beach

Tuesday, March 14, 2023

9:00 a.m.

Council Room, PCB City Hall

I. CALL MEETING TO ORDER

Chairman Chester called the meeting to order at 9:00 a.m.

II. ROLL CALL

Eight Members Present

Mr. Wilkes Absent

A. Invocation

Mr. Chester gave the Invocation.

B. Pledge of Allegiance

Ms. Pease led the Pledge of Allegiance.

III. REQUESTS TO ADDRESS THE BOARD ON AGENDA ITEMS (3 Minutes)

None

IV. CONSENT AGENDA

A. Acknowledge Receipt of the FY2023 1st Quarter Financial Statement

B. Approve Task Order 7 MRD Associates/Dewberry for the Mexico Beach Final Design, Plans and Specs, and Construction Bid Preparation for Initial Beach Restoration Project

C. Acknowledge Receipt of the January 2023 Tourist Development Tax Collection Report

Mr. Walsingham moved; seconded by Ms. Pease to approve the Consent Agenda.

Motion passed unanimously

V. PRESENTATIONS

A. FY 2022 Audit, Rich Moreira

Mr. Moreira gave a summary of the audit and reviewed the balance sheet and income statement. He stated no deficiencies were found.

B. Winter Season Recap, Dan Rowe

Mr. Rowe welcomed Mr. Johns to the board. He gave a summary of the winter programs and visitation. He praised Visitor Services for their work with winter residents, Barrie Ainslie and Dara Davis. He also read emails from visitors praising their work.

He discussed the marketing effort for the winter as well as growth in the future.

C. 2nd Quarter Media Plan Update, Jayna Leach

Ms. Leach discussed the marketing plan and media strategy.

VI. DISCUSSION ITEMS

A. Update to TDC Strategic Plan, Dan Rowe

Mr. Rowe discussed the updating of the current strategic plan to include decision making framework, product enhancement, and destination stewardship. This entails four pillars of stewardship: Economic vitality, Environmental sustainability and resiliency, Community Vibrancy, Industry Leadership. He gave an overview of the strategic plan that the board was given.

Mr. Walsingham moved; seconded by Mr. Patronis to approve the strategic plan.

Motion passed unanimously

VII. PRESIDENTS REPORT

Mr. Rowe welcomed Morgan Simo to the team.

VIII. CHAIRMAN'S REPORT

IX. AUDIENCE PARTICIPATION

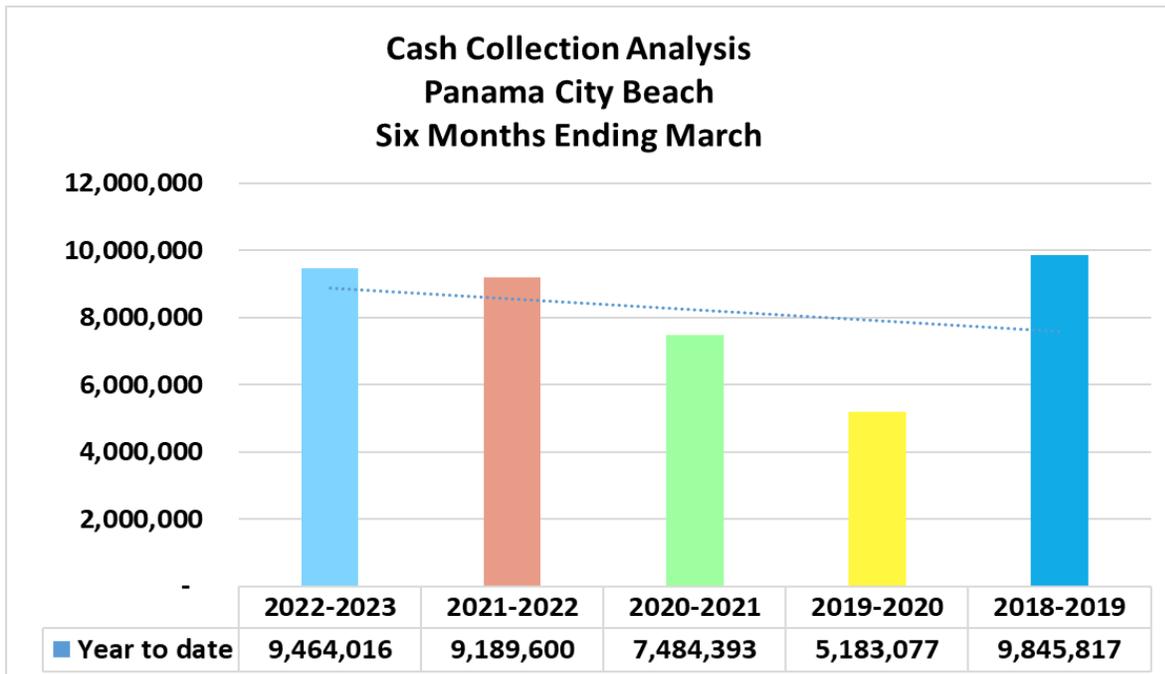
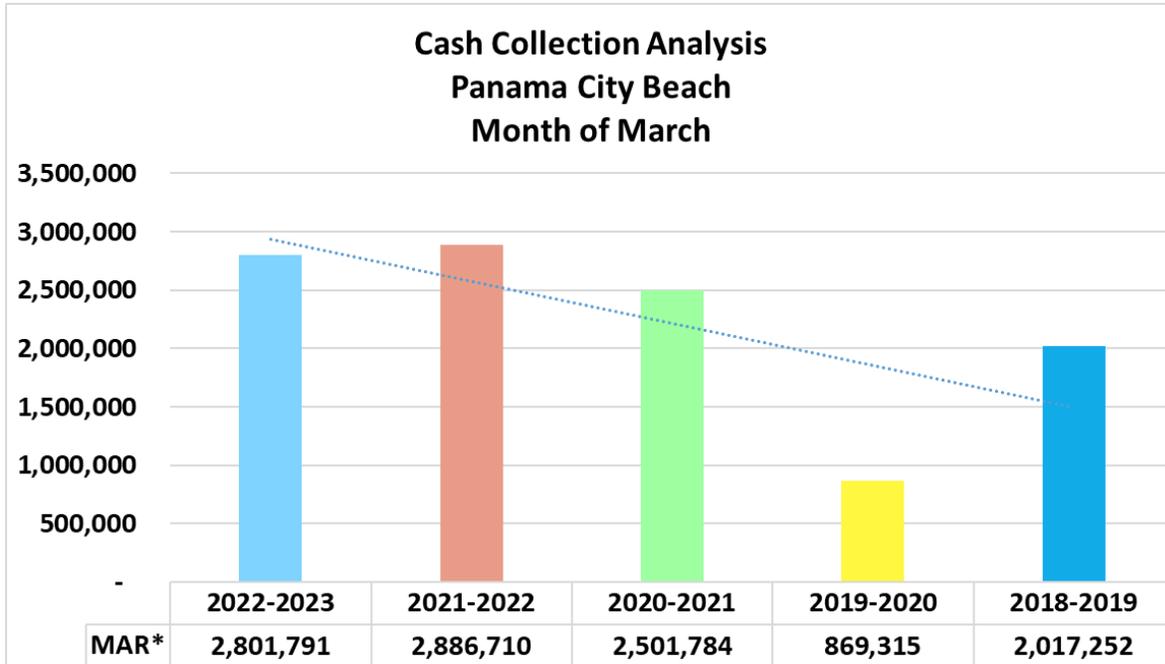
One person spoke

X. ADJOURNMENT

Respectfully submitted,
Sharon Cook, Recording Secretary



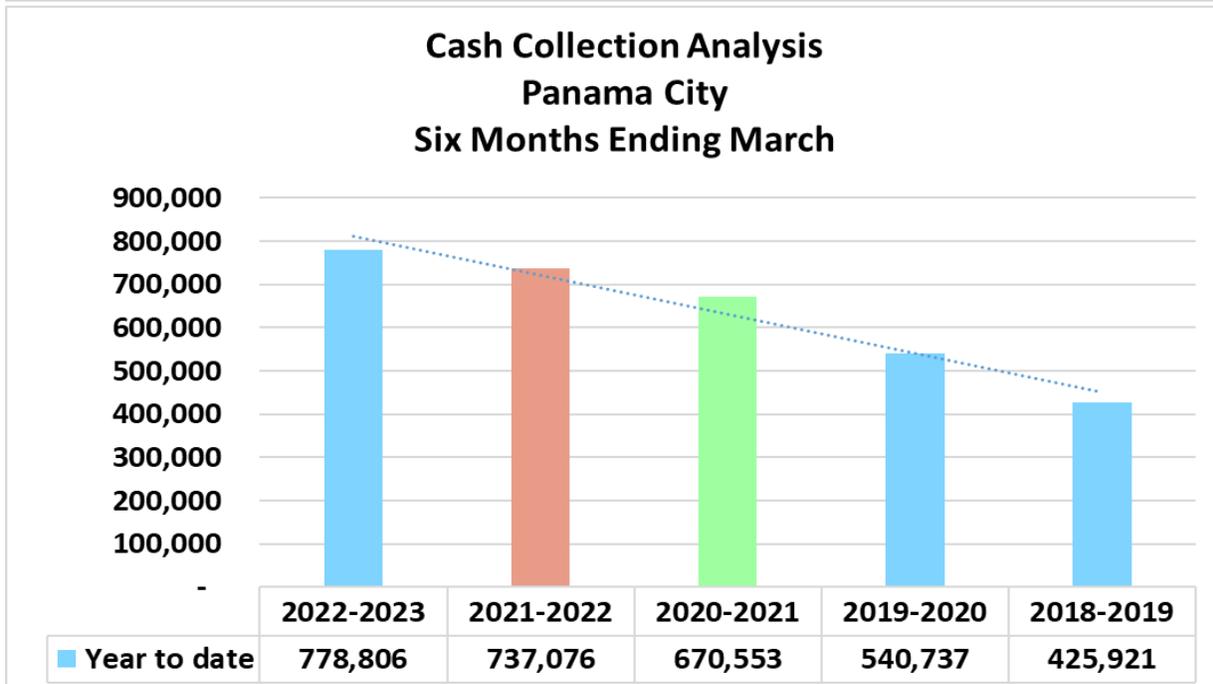
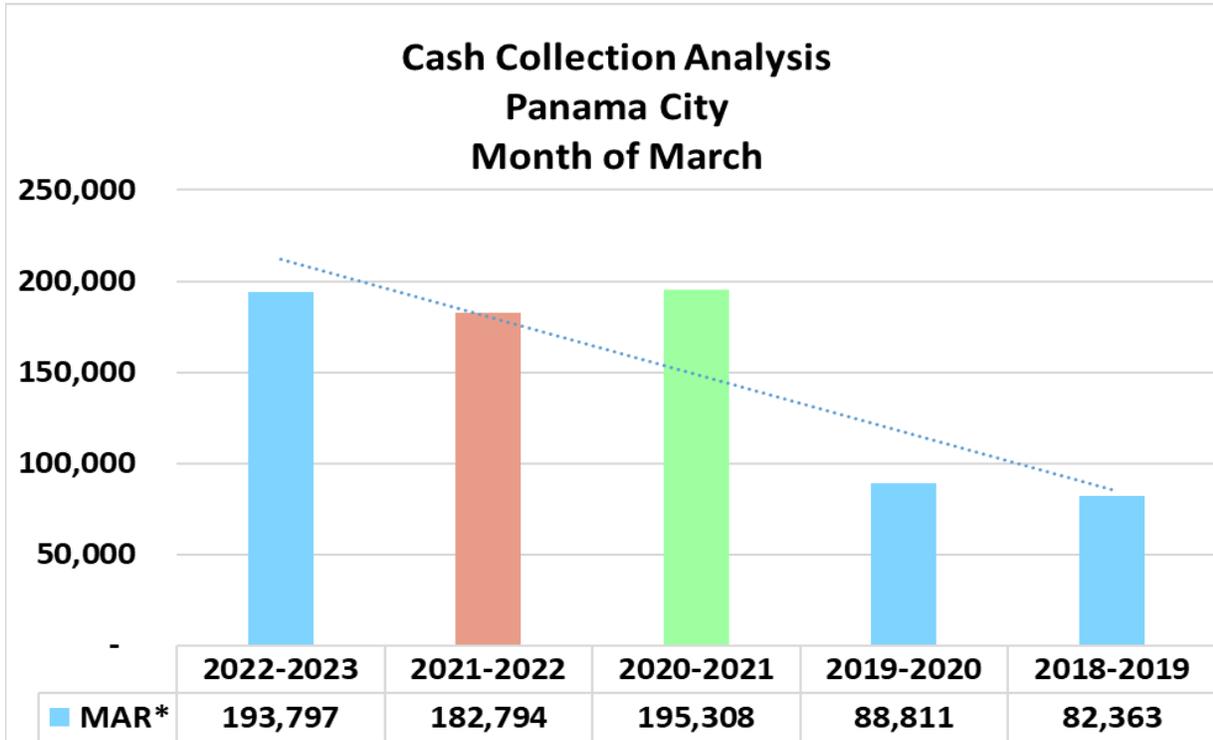
Tourist Development Tax, Bay County, Florida



Bay County Tourist Development Tax, Post Office Box 1230, Panama City, Florida 32402
 Express Delivery: 225 McKenzie Ave, Panama City, Florida 32401
 Phone: (850) 747-5226 Fax: (850) 747-5212
 Visit us at: <https://TDC.BayCoClerk.com/TouristTax/> Email: TDC@BayCoClerk.com



Tourist Development Tax, Bay County, Florida



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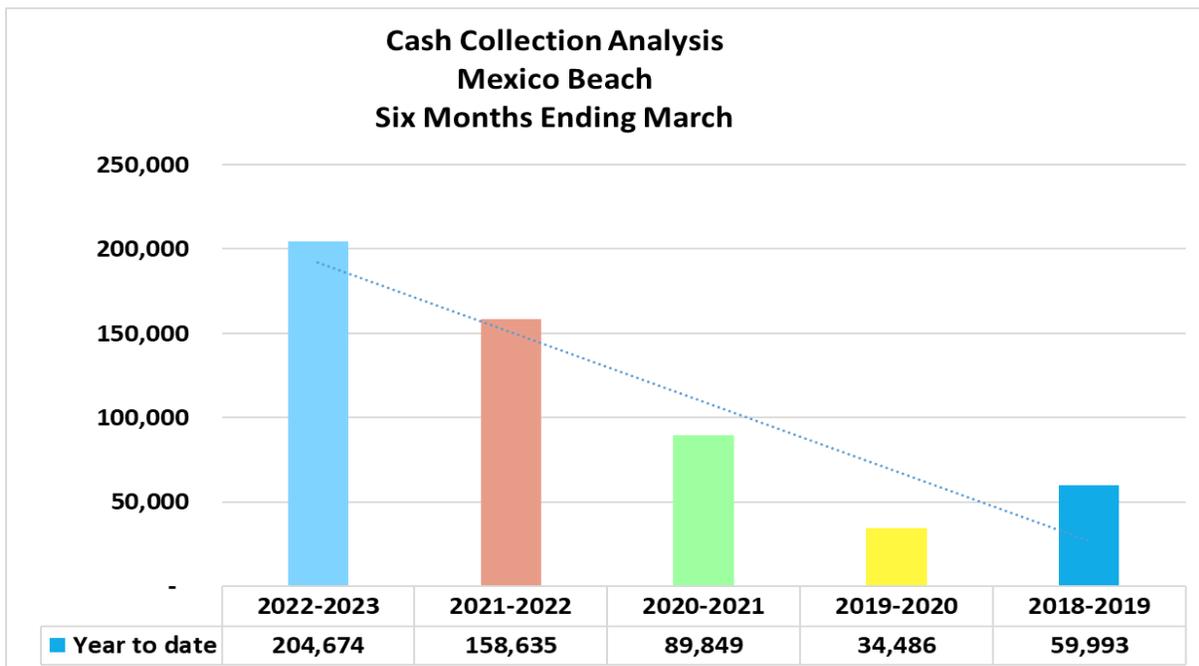
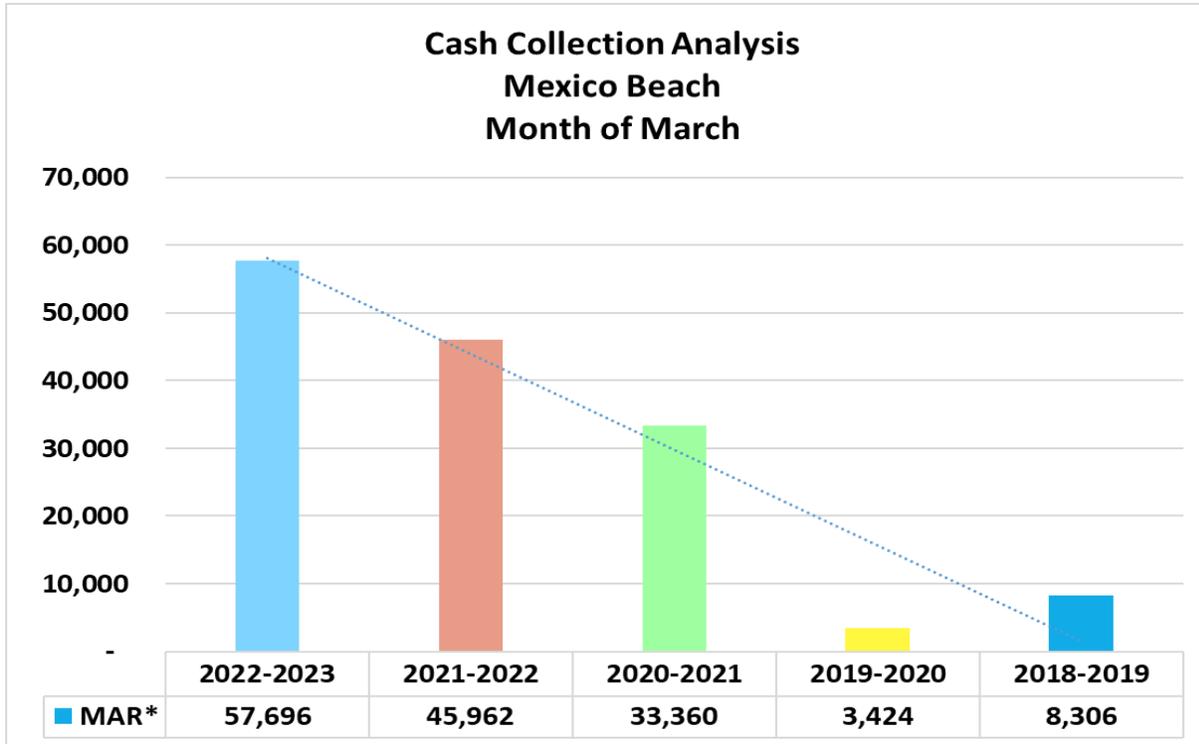
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Tourist Development Tax, Bay County, Florida



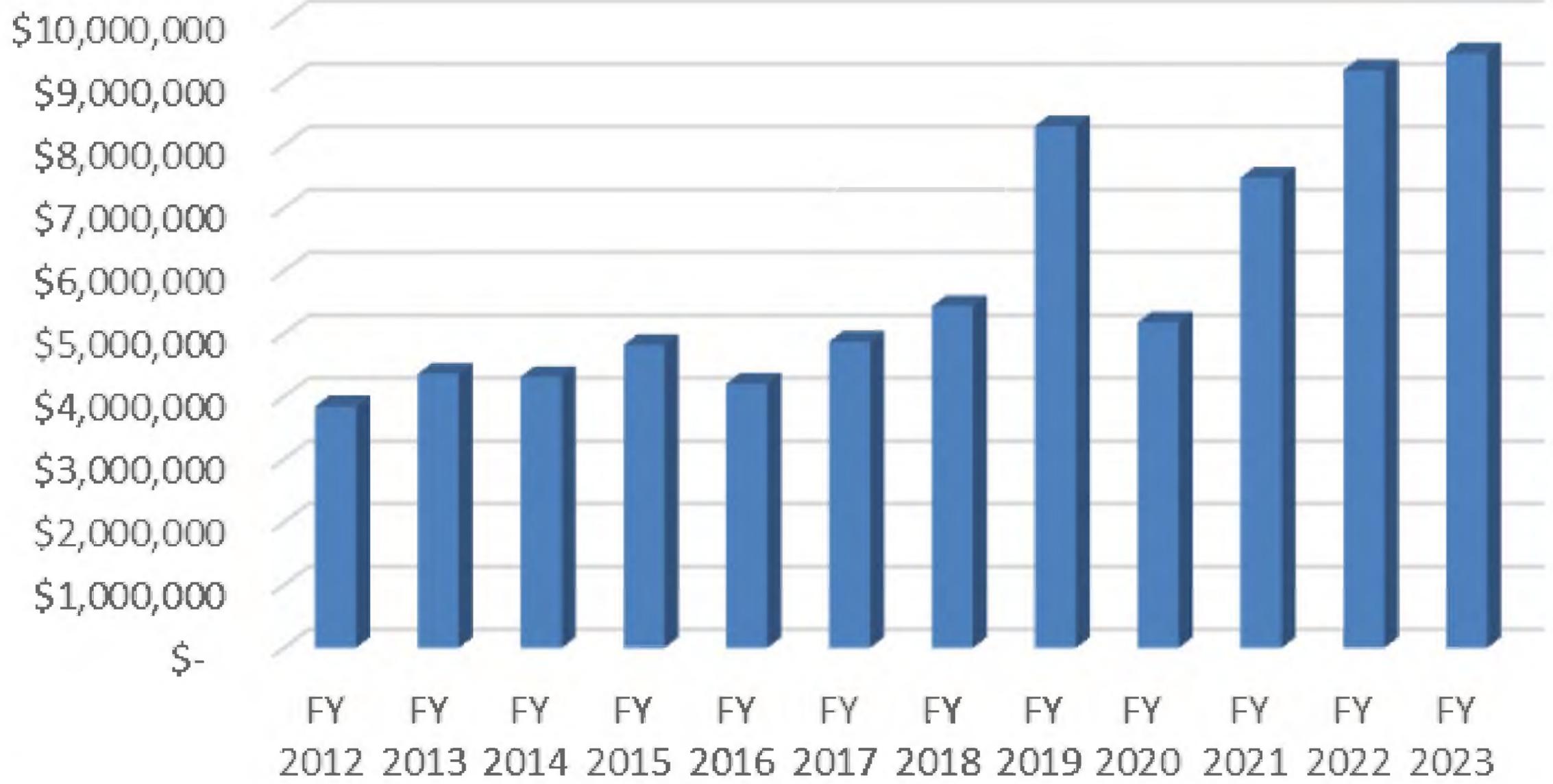
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BAY COUNTY TDC MEETING

May 9, 2023

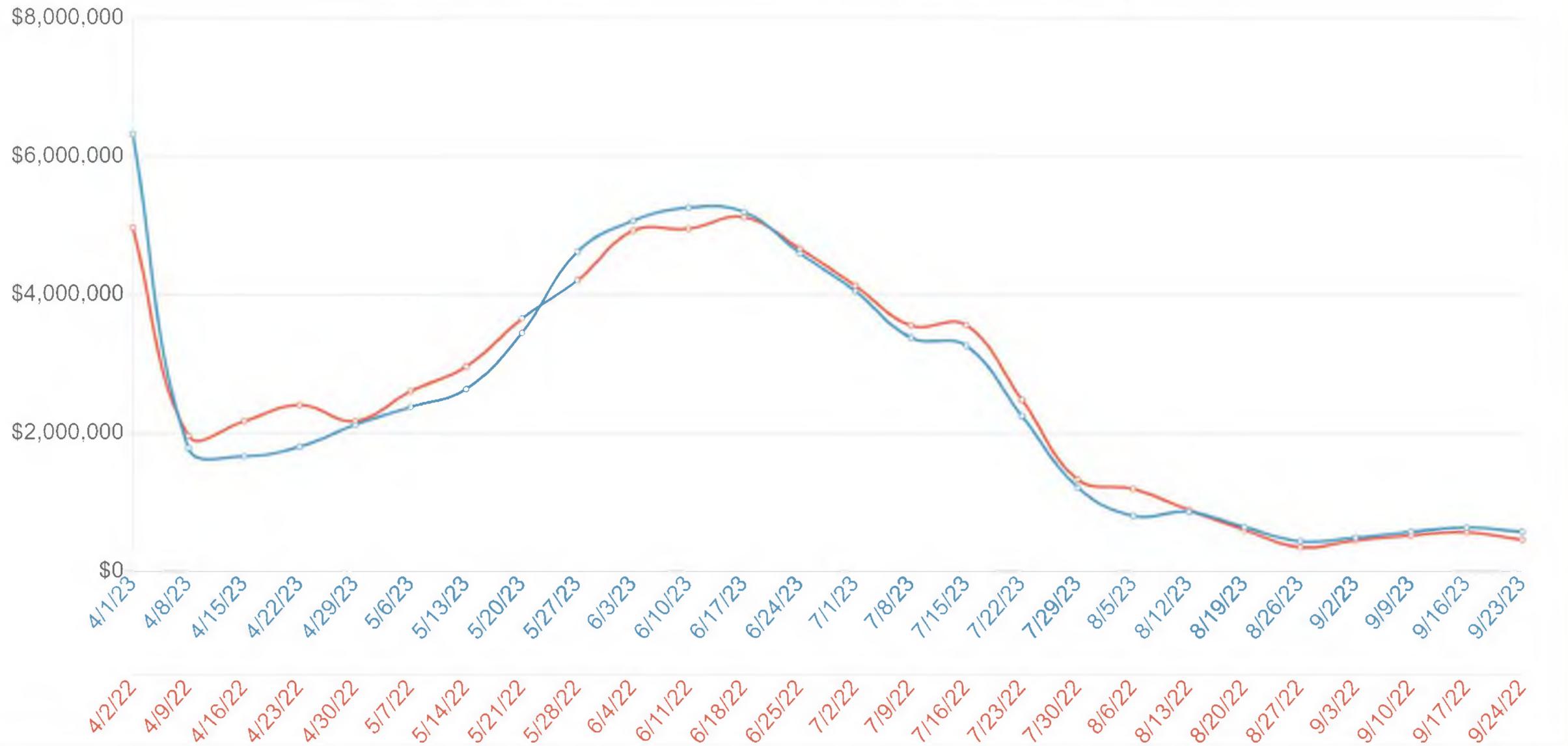


YTD Collections over time

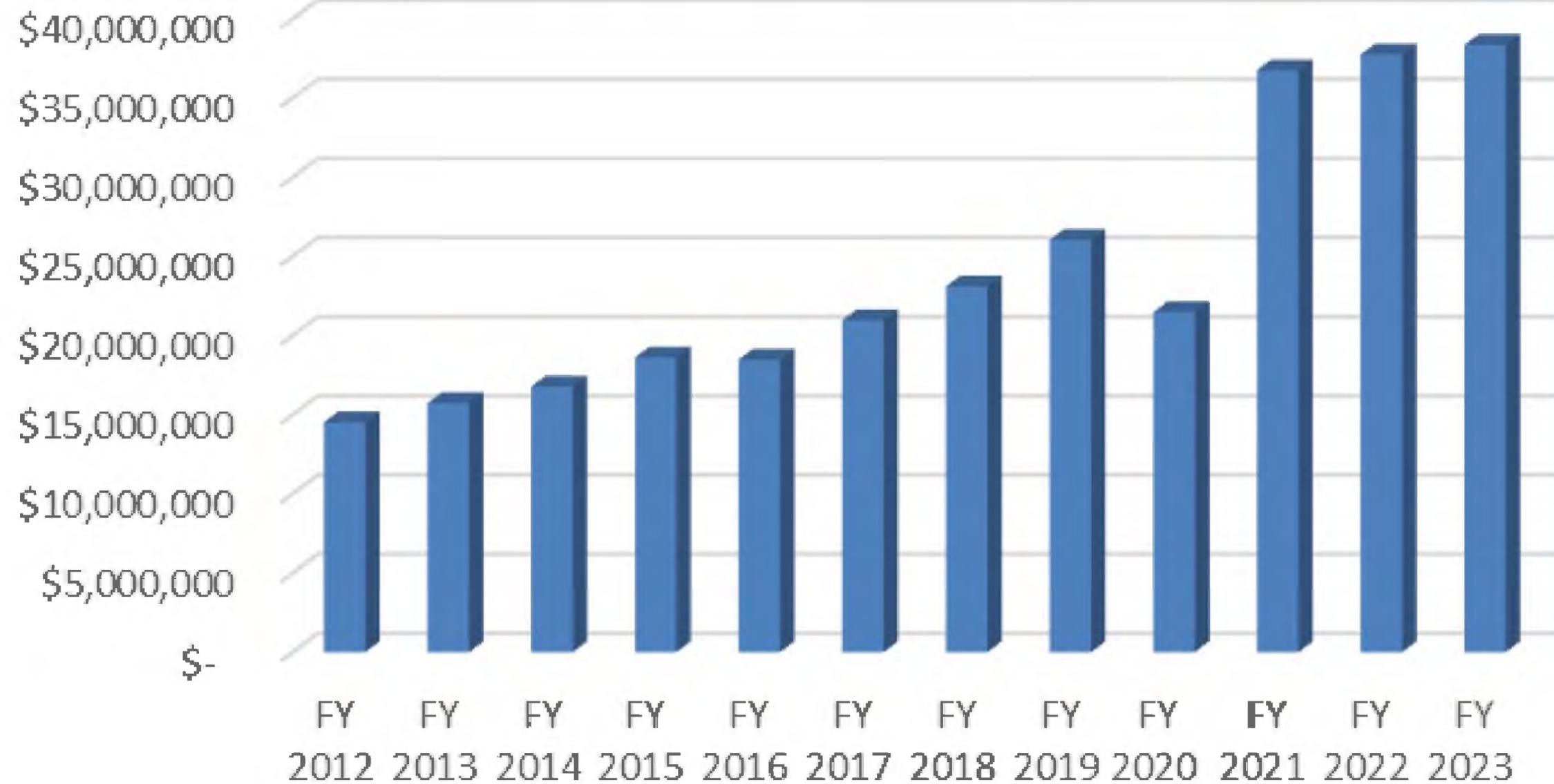


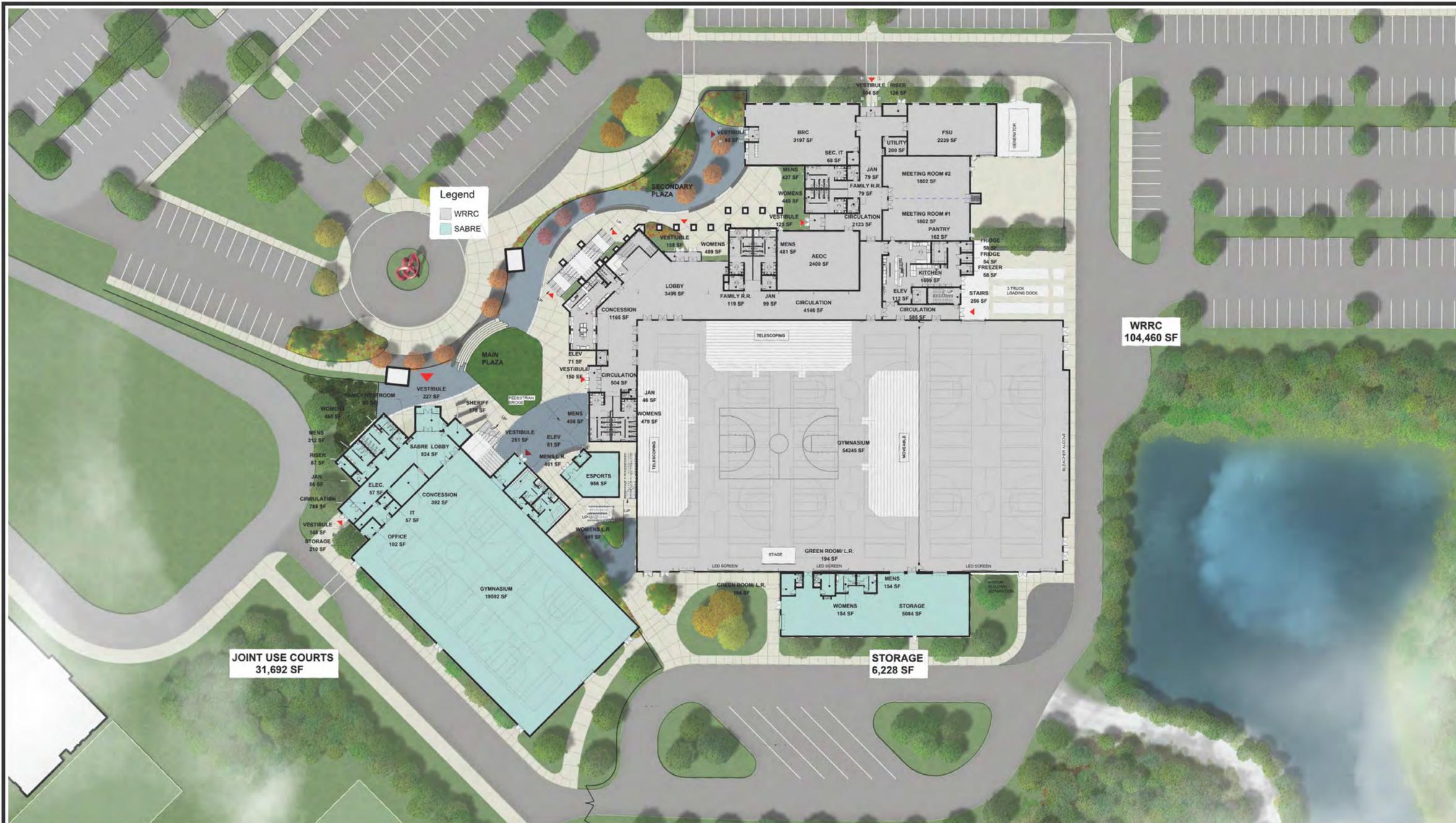
Panama City Beach Total Revenue (Nightly)

 Panama City Beach | (4/1/2023 to 9/30/2023 as of 4/30/2023) | \$65,881,768
 Panama City Beach (Compared 4/2/2022 to 10/1/2022 as of 5/2/2022) | \$66,683,128



Year-end Collections over time





SABRE EVENT CENTER

INDOOR SPORTS CENTER

JOINT USE GYM W/WALSINGHAM ACADEMY

SECURE SPACE FOR CLASSIFIED MEETINGS

BUSINESS RESOURCE CENTER

FSU PC LABS

ALT EOC

POST-STORM SHELTER



LOWER FLOOR PLAN
PANAMA CITY BEACH, FLORIDA



May, 2023
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SABRE EVENT CENTER

INDOOR SPORTS CENTER

JOINT USE GYM
W/WALSINGHAM ACADEMY

SECURE SPACE FOR
CLASSIFIED MEETINGS

BUSINESS RESOURCE CENTER

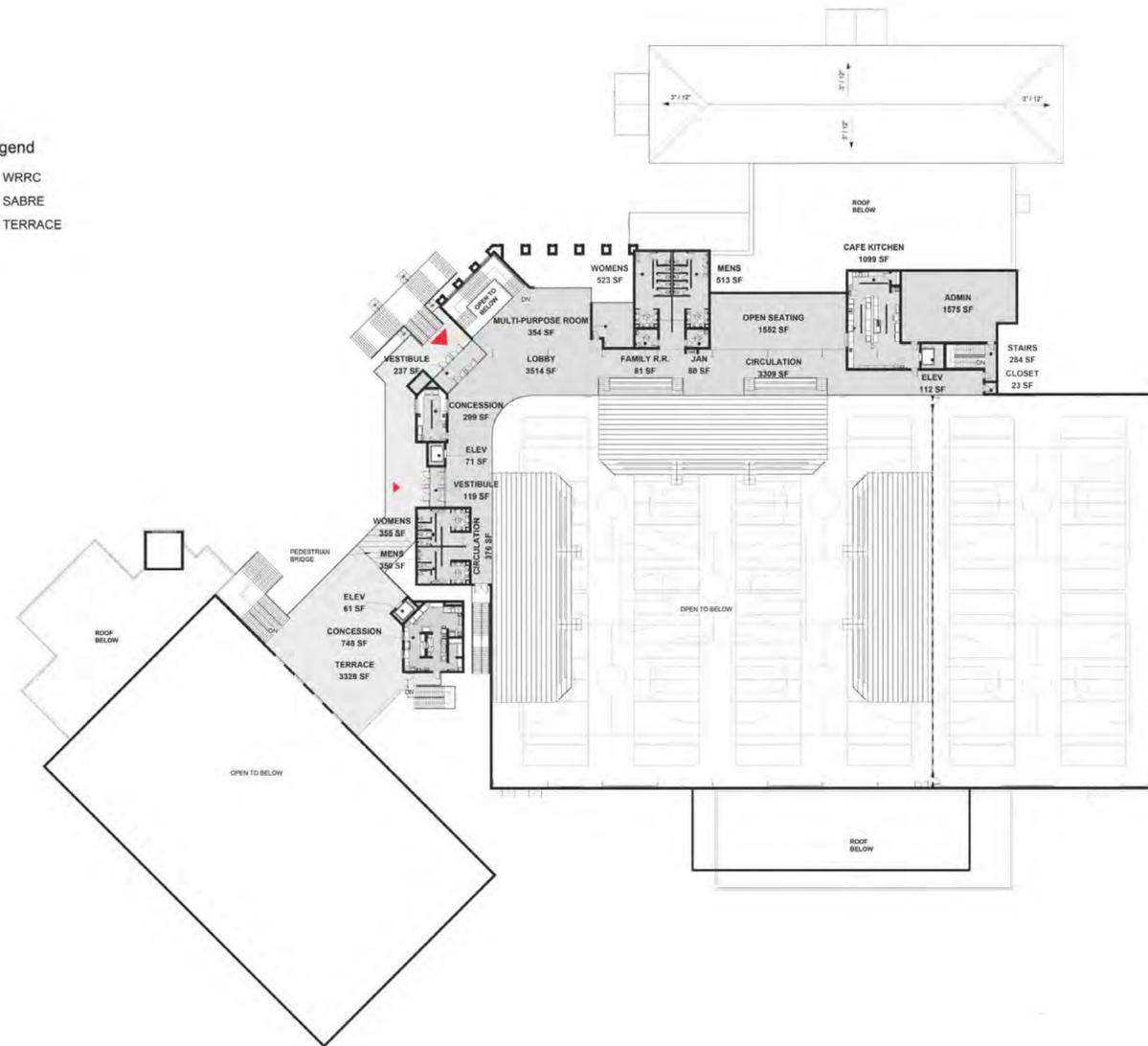
FSU PC LABS

ALT EOC

POST-STORM SHELTER



Legend
■ WRRC
■ SABRE
■ TERRACE



UPPER FLOOR PLAN
PANAMA CITY BEACH, FLORIDA



May, 2023
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LÖSE
DESIGN
SPACES FOR LIFE.

EXTERIOR PERSPECTIVE

PANAMA CITY BEACH, FLORIDA



May, 2023
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**SABRE EVENT
CENTER**

**INDOOR SPORTS
CENTER**

**JOINT USE GYM
W/WALSINGHAM
ACADEMY**

**SECURE SPACE FOR
CLASSIFIED MEETINGS**

**BUSINESS RESOURCE
CENTER**

FSU PC LABS

ALT EOC

**POST-STORM
SHELTER**





LOSE
DESIGN
SPACES FOR LIFE.

EXTERIOR PERSPECTIVE

PANAMA CITY BEACH, FLORIDA



May, 2023
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**SABRE EVENT
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EXTERIOR PERSPECTIVE

PANAMA CITY BEACH, FLORIDA



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**SABRE EVENT
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TOURISM ECONOMICS

Economic Impact of the Panama City Beach Sports Park & Stadium Complex, FL

March 2018

Report Submitted to:
The Bay County Tourist
Development Council (TDC)



ANNUAL ECONOMIC IMPACTS

SPENDING

DIRECT = \$41.0 MILLION
INDIRECT = \$10.1 MILLION
INDUCED = \$10.1 MILLION

TOTAL = \$61.3 MILLION

PERSONAL INCOME

DIRECT = \$10.8 MILLION
INDIRECT = \$2.8 MILLION
INDUCED = \$3.0 MILLION

TOTAL = \$16.6 MILLION

EMPLOYMENT

DIRECT = 453 JOBS
INDIRECT = 73 JOBS
INDUCED = 77 JOBS

TOTAL = 603 JOBS



PANAMA CITY BEACH SPORTS PARK & STADIUM COMPLEX

(Western Region Resiliency Center and SABRE Event Center)

Triumph Gulf Coast Grant Application



Submitted by:

Panama City Beach Convention and Visitors Bureau, Inc.

Original Application: March 2018 (#54)

Revised Application: December 2022

FLORIDA'S OFFICE OF ECONOMIC & DEMOGRAPHIC RESEARCH ROI MODEL

Δ IN REVENUE – INVESTMENT
INVESTMENT

TRIUMPH GULF COAST
ANNUAL ROI

$\$61.3M - \$18.5M$
 $\$18.5$

$= \$2.31$

OVER 10 YEARS

$= \$21.43$

PANAMA CITY BEACH



WINTER 2023

DECEMBER '22 – FEBRUARY '23

QUARTERLY TOURISM IMPACT

PANAMA CITY BEACH



WINTER 2023

**In 2022, winter produced
7% of the annual tourism
revenues in PCB**

METHODOLOGY

Young Strategies, Inc. (YSI) developed a visitor impact model for PCBCVB that calculates monthly, quarterly and annual impact of five different visitor segments to PCB. YSI collects primary source data from multiple research and analytics platforms as well as surveys with visitors to PCB. The impact model builds on Tourist Development Tax and visitor metrics to calculate the impact of:

1. Visitors in paid hotel/motel accommodations
2. Visitors in paid condo, single home, misc. rentals
3. Rental property owner usage
4. Non-rental vacation property owner usage
5. Visiting friends and relatives who stayed in PCB with year-round residents
6. Day-trip visitors from outside of Bay County

Data Sources –

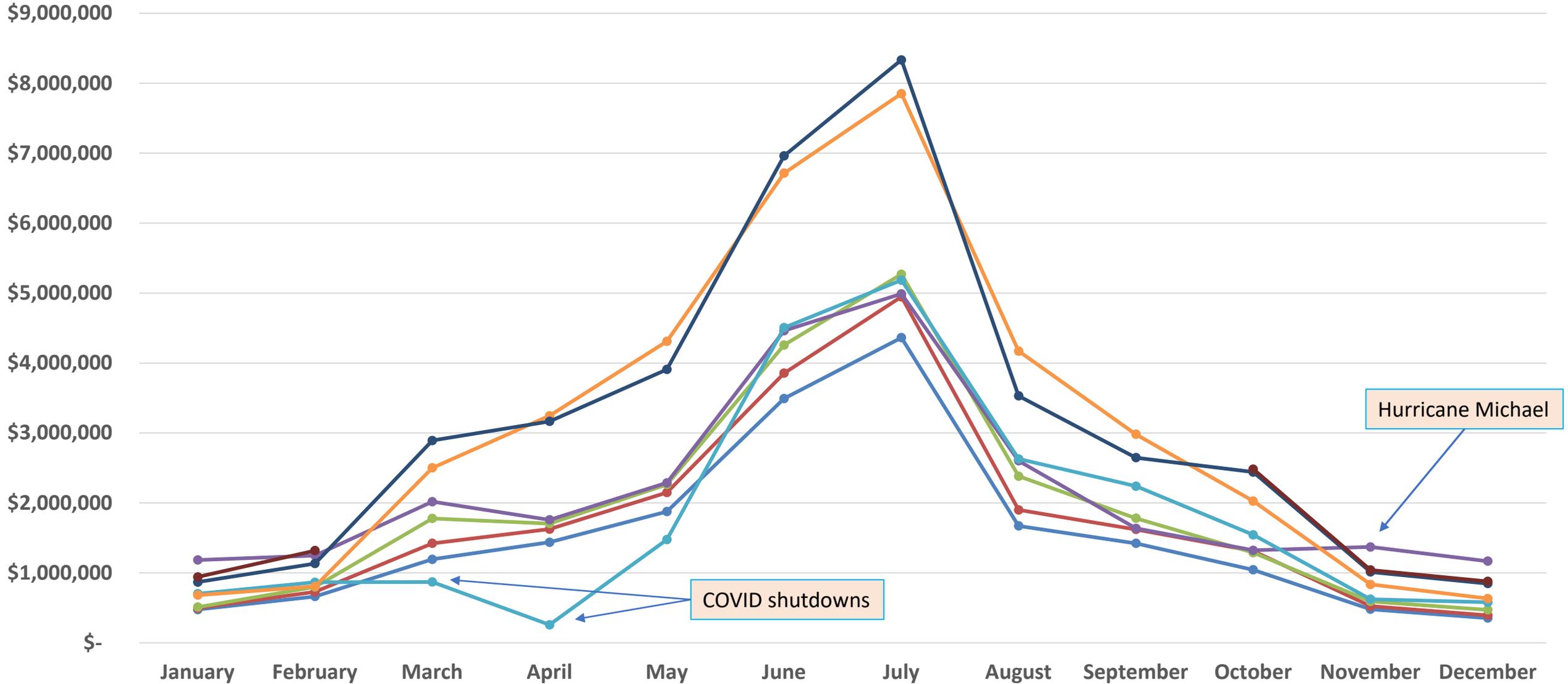
- Tourist Development Tax Monthly Revenue Reports
- City of PCB Business Tax receipts
- STR hotel data for PCB
- KeyData Dashboard lodging metrics for PCB
- AirDNA vacation rentals metrics for PCB
- NEAR mobile data for PCB
- US Census Bureau Data for PCB
- Young Strategies online and intercept surveys with visitors to PCB

Young Strategies, Inc. prepares the quarterly reports three months after the completion of each season starting with winter followed by spring and summer. The annual report accompanies the fall report.

MONTHLY TDT COLLECTIONS



FY 2016 FY 2017 FY 2018 FY 2019 FY 2020 FY 2021 FY 2022 FY 2023



Source: Monthly TDT analysis

WINTER TRENDS

Winter 2023
(DEC - FEB)



- Winter 2023 is compared to winter 2022 that was robust with record breaking visitation..
- Winter 2023 weather - unusually cold December, typical January and warm, sunny February
- 2023 PCB TDT revenue trend = DEC: +2.4%, JAN: +8.4%, **FEB: +16.3%**
- **Winter 2023 TDT revenue was up 9% over winter 2022 that was up 26% over 2021.**
- The winter season had excellent weather with only 10 rainy days in three months.
- PCB 1% Business Tax Receipts were up 1.7% for the winter period, February =7%
- The winter rental inventory of tax reporting units was up 4% over Winter '21.
- Short-term rentals revenue (\$41M) was up 5.2% represents 66% of winter TDT revenue.
- KeyData Dashboard data shows rentals revenue came from demand growth (1.4%) while rentals maintained prior year ADR.
- Hotel revenue (\$20.6M) was up 20.6% represents 34% of winter TDT revenue.
- Winter STR hotel revenue (\$17.7M) was 25% up; STR inventory was up 36% (Hyatt Place 224 rms & Bluegreen's Bayside Resort); STR demand was up 26%; STR ADR flat +0.5%
- Non STR hotel revenue (\$4M) was up 4.1%.
- **Visitor volume was up 1.7%.**

MONTHLY STR OCCUPANCY



December

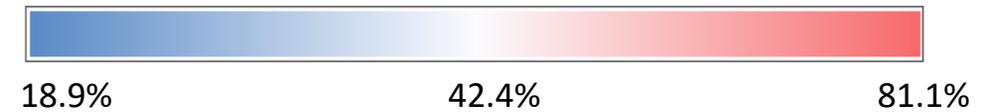
January

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				29.1%	35.6%	36.9%
23.2%	31.6%	36.3%	37.9%	34.5%	34.4%	38.3%
18.9%	24.2%	29.0%	27.9%	23.0%	34.0%	36.0%
26.8%	30.0%	27.1%	24.0%	21.6%	23.0%	24.9%
27.9%	46.9%	63.2%	68.2%	67.1%	65.7%	New Year's Eve Ball Drop

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
New Year's 52.9%	26.2%	27.3%	29.6%	30.2%	30.2%	33.8%
26.2%	33.4%	41.2%	42.3%	38.6%	Grand Slam 45.6%	Winter Games 52.1%
43.9%	35.6%	41.8%	41.9%	38.1%	39.3%	36.8%
29.9%	38.1%	41.0%	41.7%	39.9%	41.4%	43.1%
30.9%	39.0%	46.5%				

February

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			39.9%	44.2%	50.7%	54.7%
32.2%	41.6%	47.1%	48.5%	46.1%	40.5%	45.9%
39.1%	46.6%	50.2%	51.8%	53.6%	Triple Crown Baseball 72.7%	81.1%
63.4%	61.6%	63.7%	64.1%	64.8%	MSBL Sunshine Classic 73.5%	79.5%
50.1%	53.6%	56.1%				





MONTHLY STR REVPAR

December

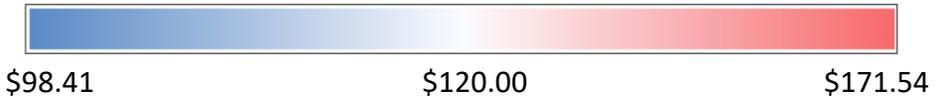
January

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				\$ 108.04	\$ 128.35	\$ 117.99
\$ 105.38	\$ 113.68	\$ 126.93	\$ 126.72	\$ 114.20	\$ 124.44	\$ 118.64
\$ 115.23	\$ 111.32	\$ 106.06	\$ 124.12	\$ 102.81	\$ 124.64	\$ 115.10
\$ 113.13	\$ 113.29	\$ 126.91	\$ 119.05	\$ 135.14	\$ 131.16	\$ 132.19
\$ 122.22	\$ 139.74	\$ 157.35	\$ 153.45	\$ 153.99	\$ 157.22	\$ 171.54

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
\$ 124.54	\$ 115.82	\$ 98.41	\$ 108.40	\$ 109.94	\$ 107.01	\$ 110.69
\$ 104.71	\$ 106.90	\$ 112.32	\$ 109.01	\$ 110.00	\$ 117.25	\$ 117.99
\$ 110.62	\$ 105.53	\$ 114.50	\$ 108.99	\$ 108.67	\$ 111.81	\$ 109.84
\$ 107.16	\$ 107.53	\$ 107.73	\$ 107.60	\$ 106.72	\$ 110.59	\$ 112.29
\$ 107.25	\$ 109.43	\$ 107.56				

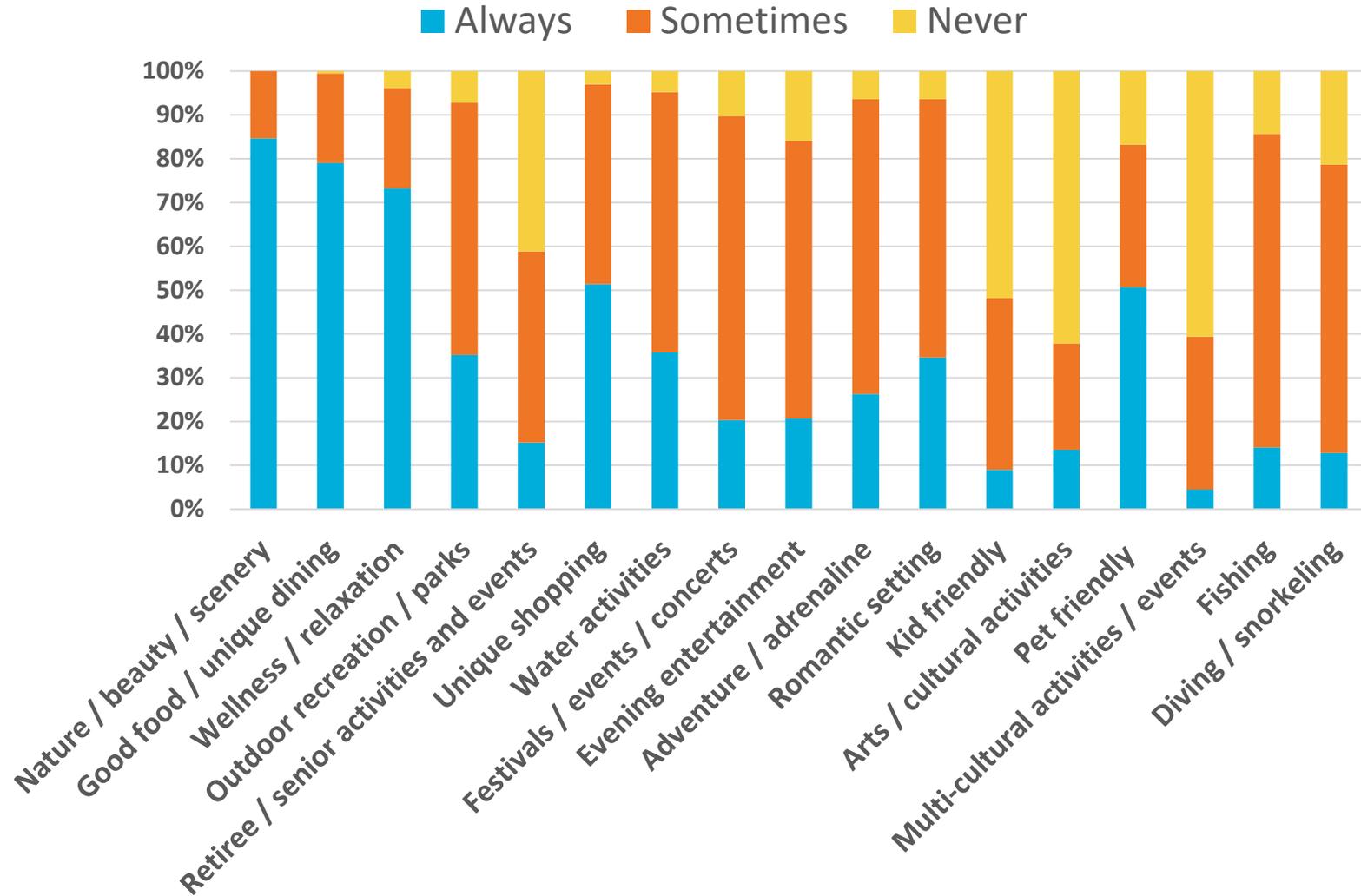
February

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			\$ 104.75	\$ 106.20	\$ 125.82	\$ 126.84
\$ 107.63	\$ 112.03	\$ 112.74	\$ 116.83	\$ 113.00	\$ 127.70	\$ 129.70
\$ 112.88	\$ 114.71	\$ 114.41	\$ 117.29	\$ 122.16	\$ 151.58	\$ 157.46
\$ 133.08	\$ 123.20	\$ 126.85	\$ 125.70	\$ 125.31	\$ 161.15	\$ 150.12
\$ 119.67	\$ 122.45	\$ 124.64				



Source: STR

SURVEY: ATTRIBUTES WHEN SELECTING A DESTINATION



Attribute	Always	Sometimes	Never
Nature / beauty / scenery	84.6%	15.4%	0.0%
Good food / unique dining	79.1%	20.4%	0.6%
Wellness / relaxation	73.3%	22.8%	3.9%
Outdoor recreation / parks	35.2%	57.5%	7.3%
Retiree / senior activities and events	15.2%	43.7%	41.1%
Unique shopping	51.4%	45.6%	3.0%
Water activities	35.8%	59.4%	4.8%
Festivals / events / concerts	20.3%	69.4%	10.3%
Evening entertainment	20.7%	63.5%	15.9%
Adventure / adrenaline	26.3%	67.3%	6.4%
Romantic setting	34.6%	58.9%	6.4%
Kid friendly	9.0%	39.2%	51.8%
Arts / cultural activities	13.6%	24.3%	62.1%
Pet friendly	50.7%	32.5%	16.8%
Multi-cultural activities / events	4.5%	34.8%	60.6%
Fishing	14.1%	71.5%	14.4%
Diving / snorkeling	12.8%	65.9%	21.3%

Q. Please tell us the level of importance for each of the following attributes when selecting a getaway / vacation destination. n=364

Source: YSI visitor profile surveys

SURVEY: FIRST-TIME vs REPEAT VISITATION

- **35.1%** were first-time visitors (23.8% winter '22)
- **64.9%** had visited PCB before (76.2% winter '22)

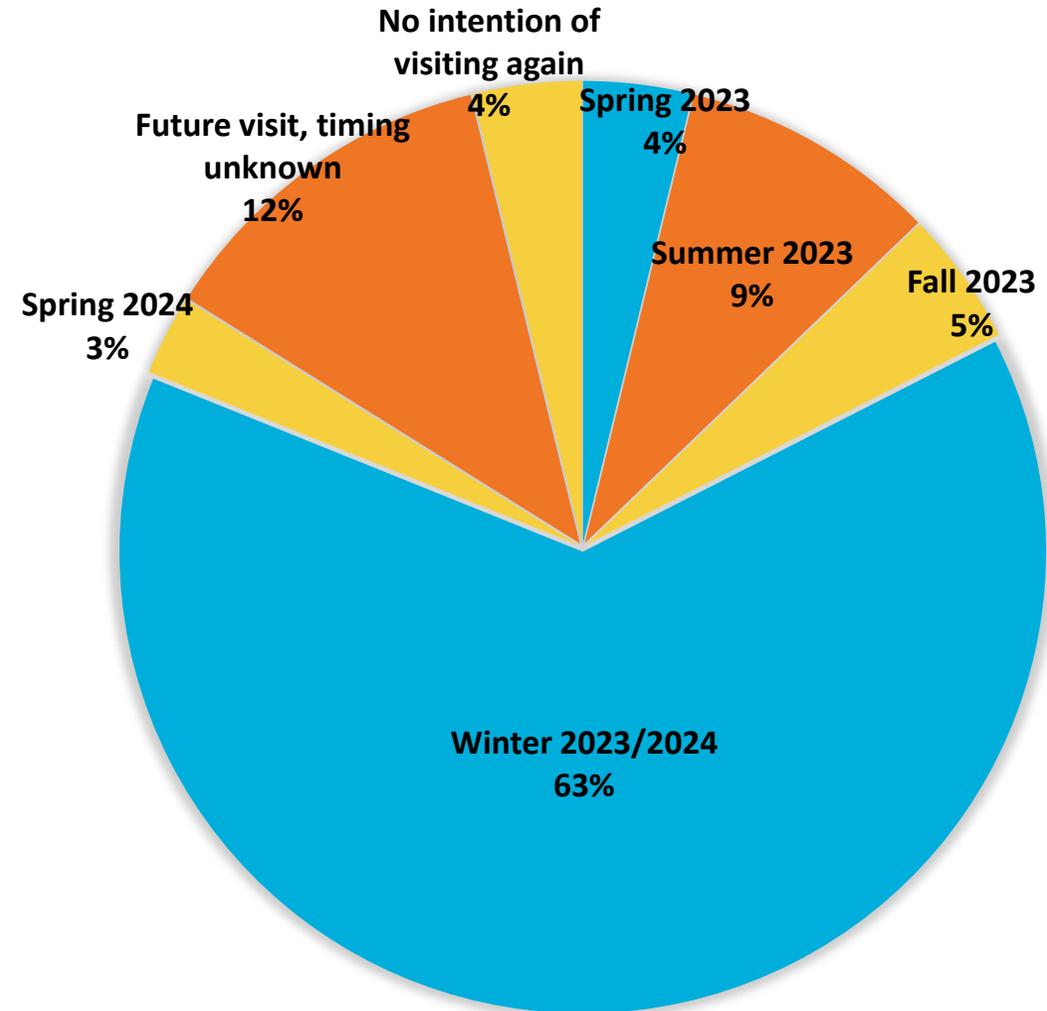
Repeat visitors:

- Growth in first-time, new visitors
- The repeat visitors reported coming to PCB for average of **12.4 years** with an average of **2.8 visits in last 12 months**



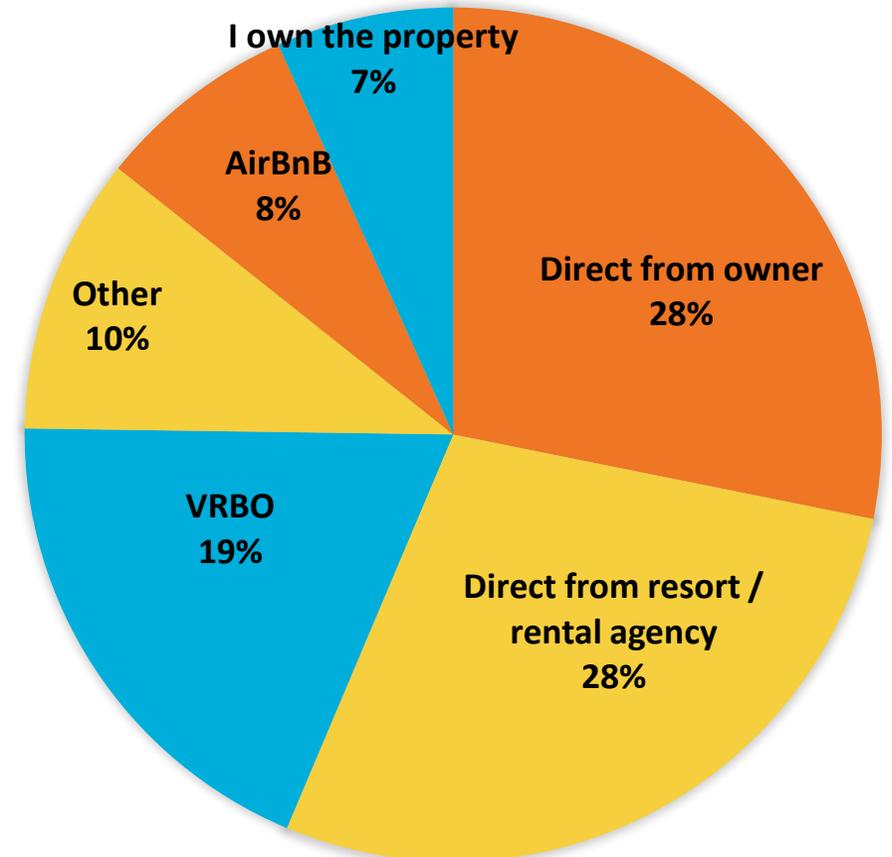
SURVEY: TRIP PLANNING

Q: Please tell us if you are planning a future visit to Panama City Beach. n=312



Vacation rentals:

Q: How did you reserve your vacation accommodation. n=239



SURVEY: PRIMARY TRIP PURPOSE



92.3%

VACATION / GETAWAY



4.8%

VISIT FRIENDS / FAMILY



1.7%

SPORTS EVENT / TOURNAMENT



0.9%

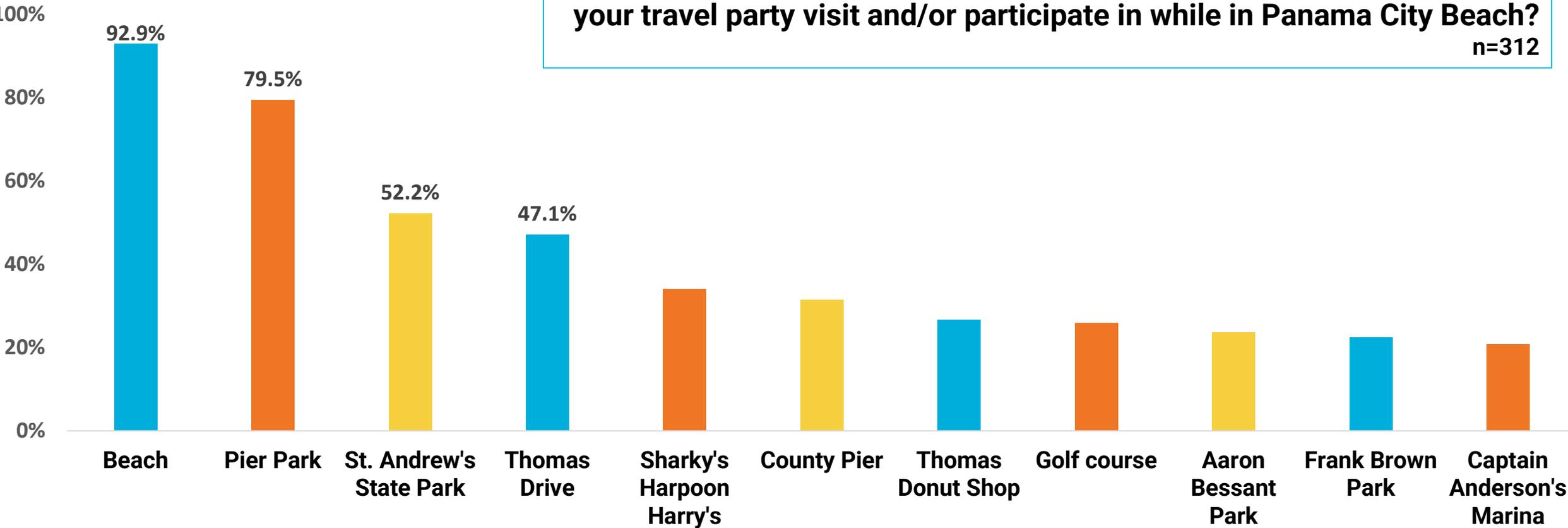
FESTIVAL / EVENT / CONCERT

Q. What was the MAIN purpose for your most recent trip to Panama City Beach?
n=352

SURVEY: ACTIVITIES / ATTRACTIONS

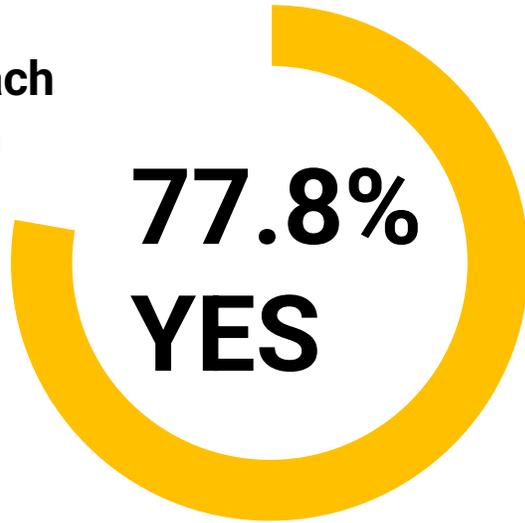


Q: Which attractions / activities / rentals or areas did you or someone in your travel party visit and/or participate in while in Panama City Beach?
n=312



SURVEY: FAVORITE BEACHES

Is Panama City Beach your favorite beach destination? n= 316



Has PCB always been your favorite beach destination? n=246



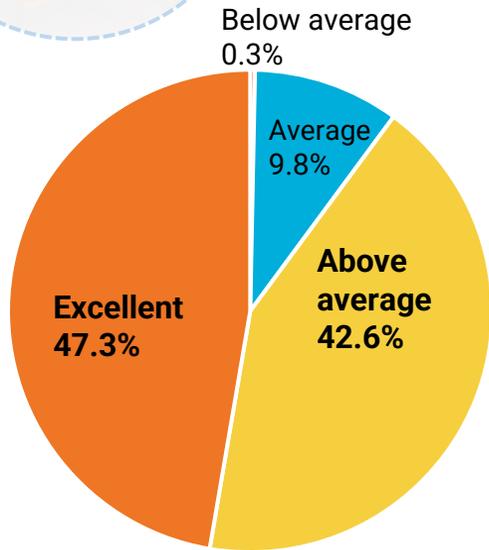
52.4%
NO

If no, please tell us what your favorite beach destination was previously? n=127

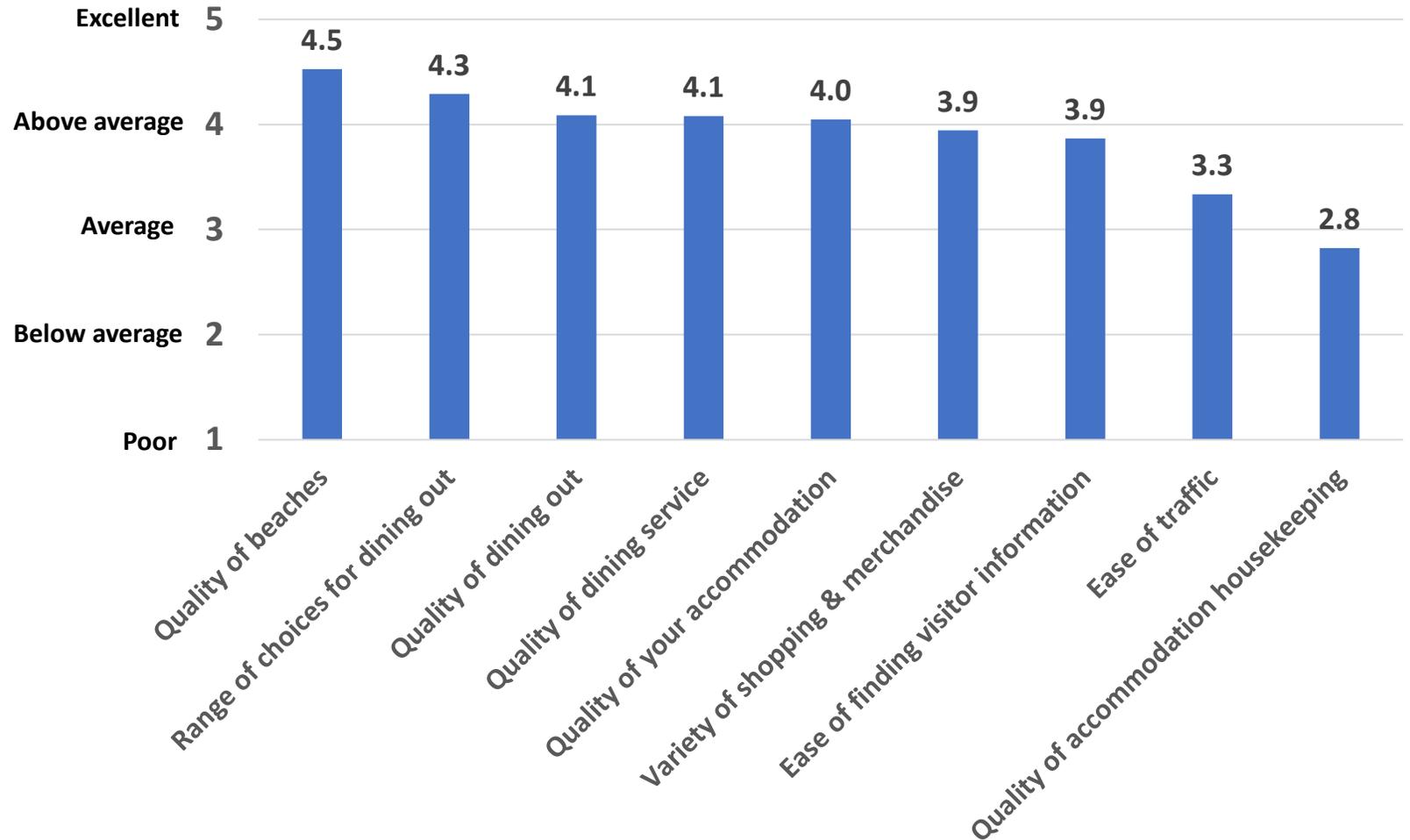
- **Myrtle Beach (14)**
- **Clearwater (7)**
- **Destin (7)**
- **Clearwater (6)**
- **Virgin Islands (6)**
- **Fort Myers Beach (7)**
- **Gulf Shores (6)**
- Mexico (5)
- Cuba (3)
- Hawaii (3)
- Hilton Head (3)
- Lake Michigan (3)
- **Tampa (3)**
- **Anna Maria Island (2)**
- Bahamas (2)
- **Cocoa Beach (2)**
- **Daytona Beach (2)**
- **Florida Keys (2)**
- Jamaica (2)
- **Key West (2)**
- **Naples (2)**
- Orange Beach (2)
- South Padre Island (2)
- **St. Pete Beach (2)**
- Vancouver Island (2)
- Aruba
- Atlantic Beach
- Biloxi
- **Bradenton**
- **Cape Coral**
- Carolina coast
- Cruises
- Duck, NC
- **Ft. Walton Beach**
- **Hollywood Beach**
- **Holmes Beach**
- Isle of Palms
- Jekyll Island
- Lake Superior
- **Lauderdale by the Sea**
- **Marathon Key**
- **Marco Island**
- **Mexico Beach**
- **Miami**
- Newport Beach
- North Myrtle Beach
- Pacific Ocean
- Playa del Carmen
- **Rosemary Beach**
- San Diego
- Sea Island
- **Siesta Beach**
- **St. Augustine**
- Surfside Beach
- **Tarpon Beach**
- **Titusville**
- **Treasure Island Beach**
- Tybee Island
- Ventura
- Virginia Beach

SURVEY: DESTINATION SATISFACTION

OVERALL TRIP SATISFACTION



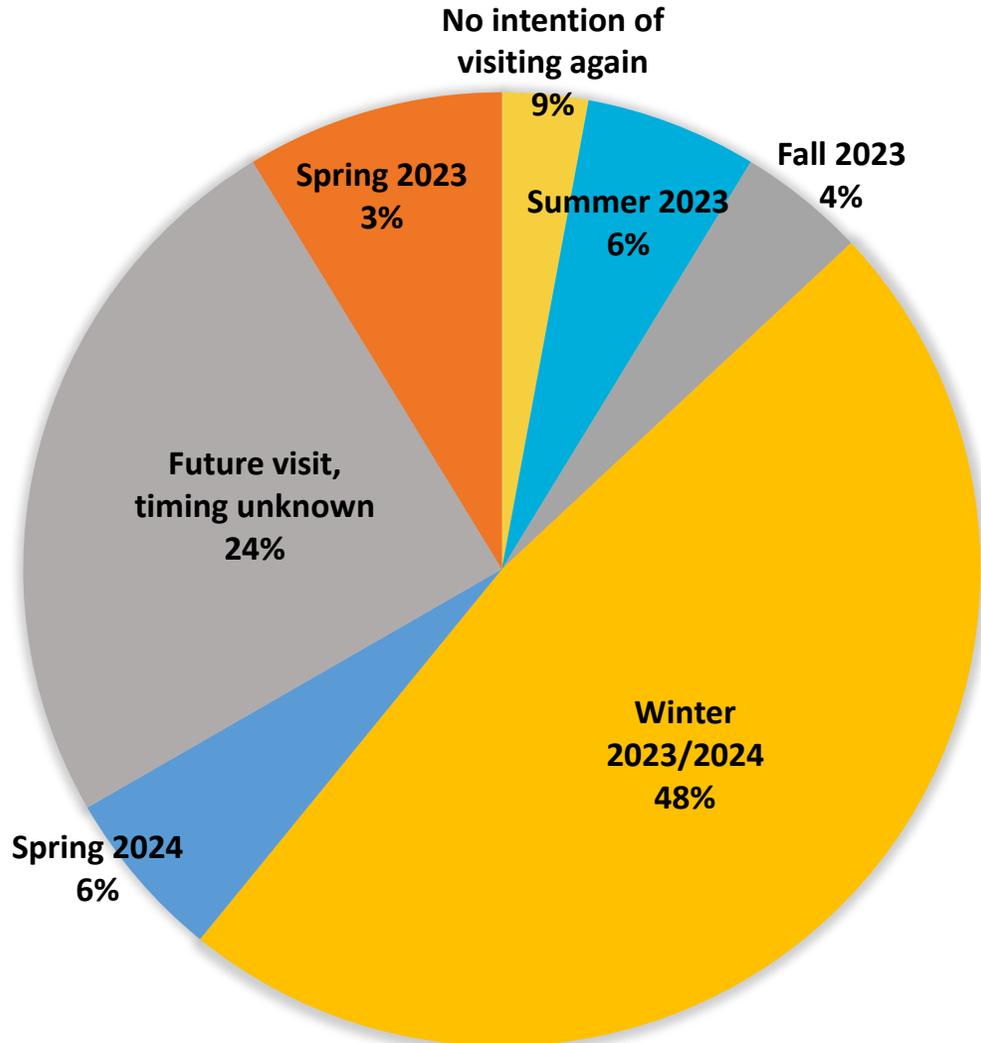
Q. Overall, how would you rate your visit to Panama City Beach? n=317



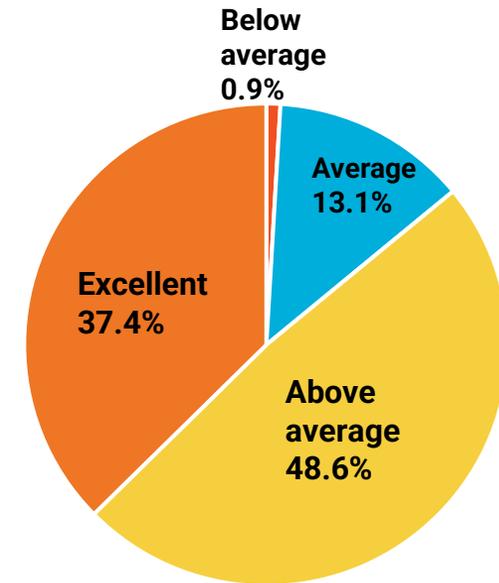
Q. Following is a list of amenities offered in Panama City Beach. Considering this visit, please rate each amenity. n=317

SURVEY: FIRST-TIME VISITATION

First-time visitors: Please tell us if you are planning a future visit to Panama City Beach. n=104



First-time visitors: Overall, how would you rate your visit to Panama City Beach? n=107



First-time visitors: What was the MAIN purpose for your most recent trip to Panama City Beach? n=124



93.5%

VACATION / GETAWAY



4.0%

SPORTS EVENT / TOURNAMENT

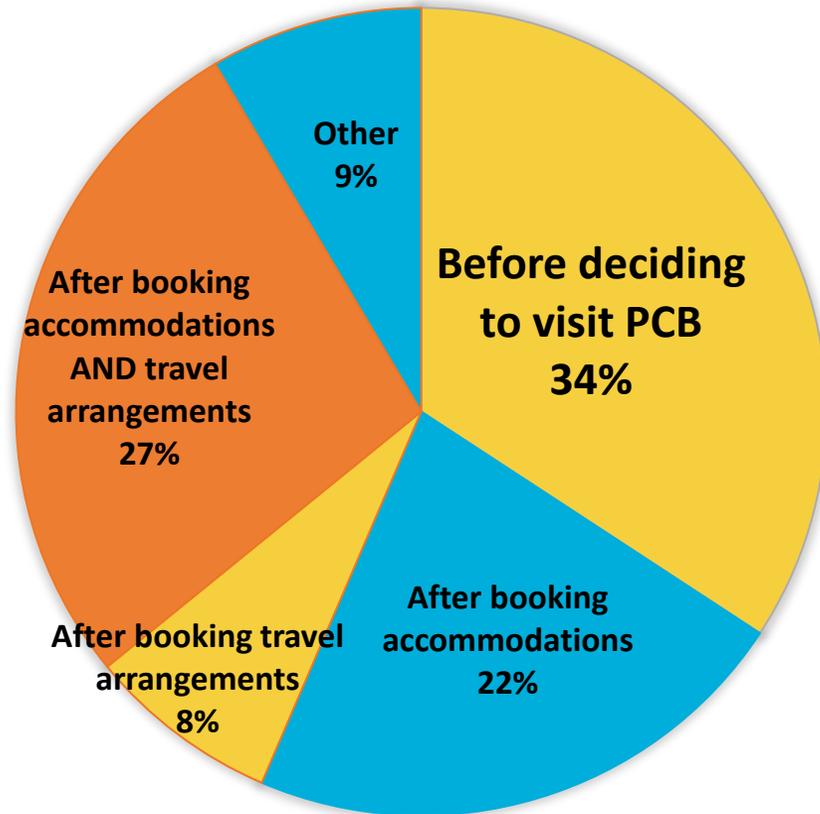


2.4%

VISIT FRIENDS / FAMILY

SURVEY: VISITOR INFORMATION

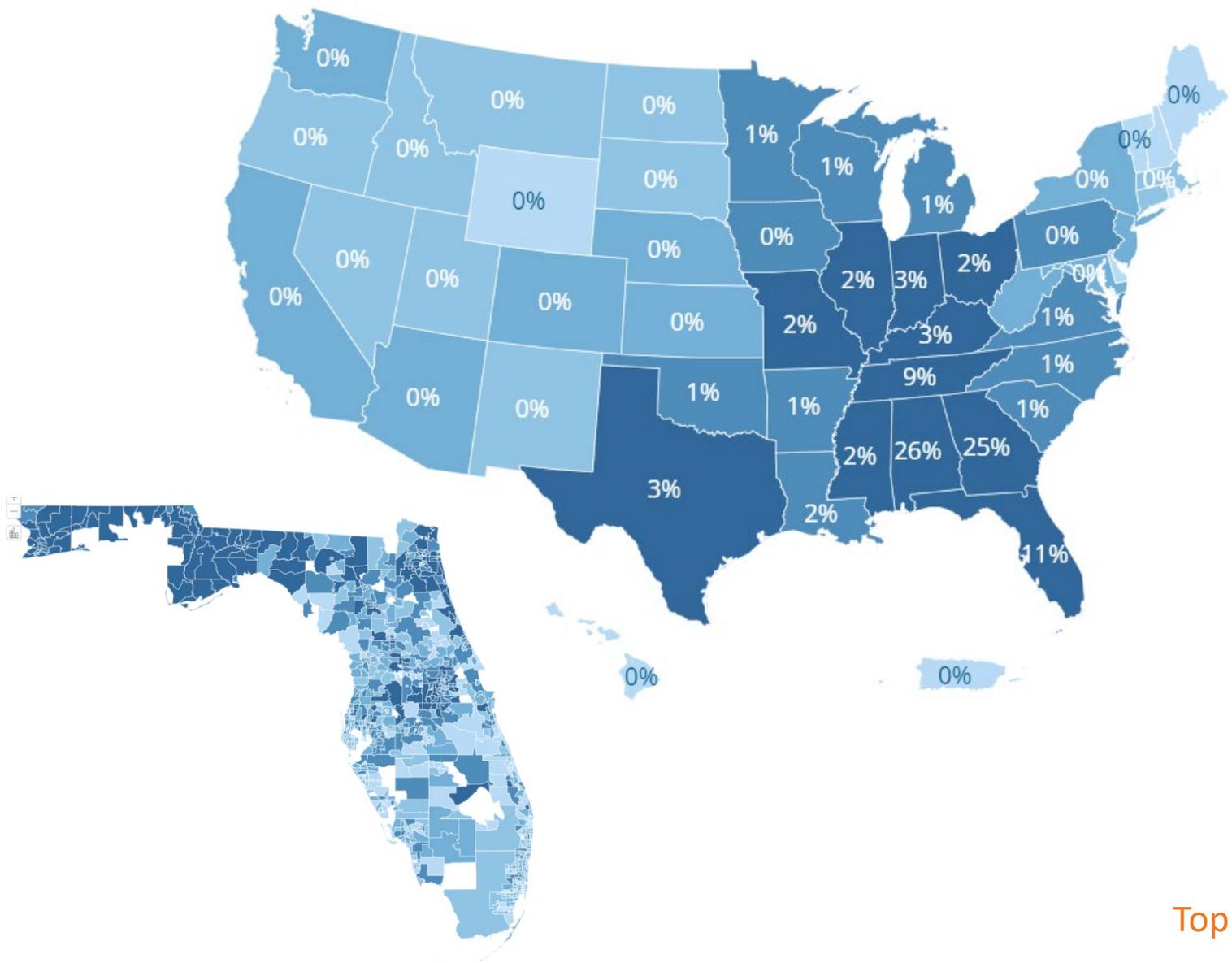
Please tell us when you requested information from Visit Panama City Beach. n= 365



Please tell us, in rank order, what information you were looking for in the Panama City Beach Vacation Guide. n=343

Overall Rank	Information
1	Activities
2	Dining
3	Lodging / accommodation
4	Inspiration for the visit
5	Shopping
6	Evening entertainment / nightlife

TOP FEEDER MARKETS



Top Eleven States (in rank order)	Winter '23 DEC '22 – JAN '23	Winter '22 DEC '21 – JAN '22
1. Alabama	26.1%	21.5%
2. Georgia	24.6%	17.1%
3. Florida	10.9%	13.2%
4. Tennessee	8.6%	4.4%
5. Kentucky	3.4%	1.8%
6. Indiana	2.9%	1.9%
7. Texas	2.8%	2.2%
8. Mississippi	2.4%	1.7%
9. Illinois	1.9%	1.7%
10. Ohio	1.8%	1.5%
11. Missouri	1.7%	1.5%

Top 3 visiting states make up 59% of winter visitation

Source: NEAR mobile data as reported on Voyage platform

WINTER 2023 KEY METRICS



AVERAGE
LENGTH OF STAY



Sources: KEYDATA™



AVERAGE TRAVEL PARTY
SIZE



Source: YSI visitor profile survey



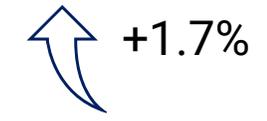
OVERNIGHT SPENDING
PER TRAVEL PARTY



Source: YSI visitor profile survey



TOTAL UNIQUE
VISITOR COUNT



Source: YSI visitor profile survey
 KEYDATA™

ECONOMIC IMPACT

WINTER 2023
(DEC-FEB)



GROSS LODGING REVENUE
\$62,770,720

Variance '22

+9.2% ↑



OVERNIGHT TRAVEL PARTIES
132,919

+8.6% ↑



AVERAGE LENGTH OF STAY
7.6 nights

-9.0% ↓



SPENDING per OVERNIGHT PARTY
\$1,779

-0.7% ↓



TOTAL VISITOR SPENDING
\$237,825,707

+7.4% ↑

SUMMARY OF ECONOMIC IMPACT



TOTAL VISITOR SPENDING BY SECTOR

Visitor spending	Winter '22	Winter '23	Variance
Hotel / motel (Taxed lodging)	\$67,786,674	\$81,058,509	19.6%
Condo / rentals (Taxed Lodging)	\$90,162,799	\$92,248,488	2.3%
Other overnight (VFR, owners, etc.)	\$31,824, 890	\$32,602,489	2.4%
Daytrip	\$31,569,375	\$31,916,221	1.1%
Total visitor spending	\$221,343,739	\$237,825,707	7.4%

Total visitor spending in Winter '23 was driven by lodging inventory growth, increased visitation and higher prices.

Source: YSI Economic Impact Model