# 2015 Program of Work

The are 10



Visit Panama City Beach, a 501c6 non—profit corporation, is the official destination marketing organization for Panama City Beach Florida and is an extension of the Bay County Tourist Development Council (TDC). The TDC has oversight of the destination marketing activities for the cities of Panama City and Mexico Beach, but those activities are performed by separate 501c6 nonprofit corporations.

Visit Panama City Beach is primarily funded by a tourist development tax paid by visitors for overnight lodging stays on Panama City Beach. Of the 5% tax, approximately 3.5% is used by Visit Panama City Beach to fund its destination marketing activities. The remaining 1.5% is utilized by the TDC for beach renourishment, beach maintenance, landscaping and other tourist development activities. Additional funding is secured from the private sector, through cooperative marketing opportunities, corporate sponsorships, revenues generated through festivals and events.

The Board of Directors for Visit Panama City Beach are the nine members of the Tourist Development Council. For the purpose of this document the acronym TDC is synonymous for both entities.

More information on Visit Panama City Beach can be found on our website: VisitPanamaCityBeach.com



This program of work and budget, developed over the Summer of 2014, is the road map that guides all Visit Panama City Beach marketing and sales efforts for FY 2015. The plan was developed, on a foundation of visitor research, by Visit Panama City Beach Staff and Agencies of Record, with guidance and insight from the Board of Directors and industry stakeholders.

The plan was presented to the Board of Directors (adopted - September 18, 2014) and the Bay County Board of County Commissioners (approved – October 7, 2014).





# Situational Overview

# Introduction

FY 2014 proved to be another record breaking year for tourism in Panama City Beach. Tourist development taxes are on pace to exceed last year's collections by 6.6% by reaching \$16.8 million. Since FY 2007, Panama City Beach has been one of the top performing destinations in the State of Florida in terms of tourism growth.

During the upcoming Fiscal Year, the Bay County Tourist Development Council/Visit Panama City Beach (TDC) will work to continue to sustain this momentum and leverage opportunities created through the increased visitation to Panama City Beach that has occurred over the past several years.

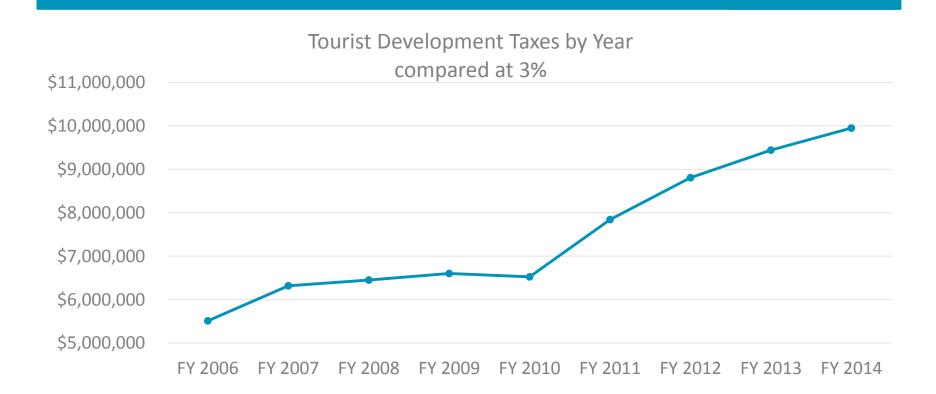


The TDC's FY 2015 Program of Work will focus on executing the core elements of its updated Strategic Plan:

- · Preserve and enhance the beach, our most important natural resource
- Enhance the visitor experience
- Develop and market Panama City Beach as a year-round destination
- Enhance and develop public venues to generate additional visitor demand



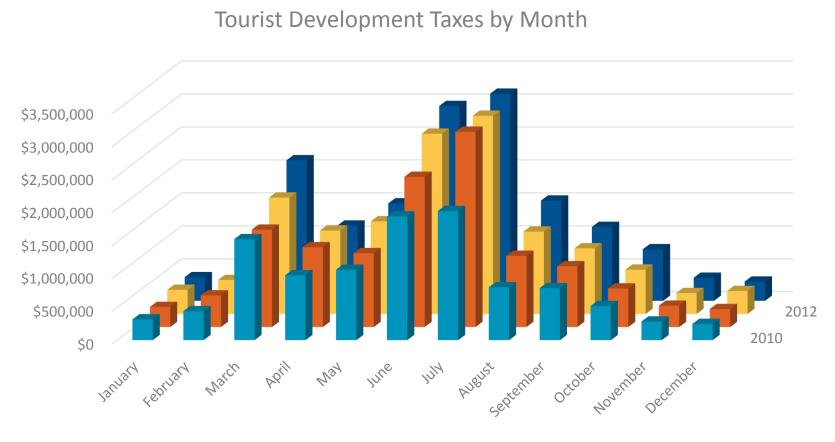
# Tourist Development Taxes - growth over time



Tourist Development Tax Collections, compared at 3%, have increased by 80.5% since FY 2006. The majority of the growth - 65.2% of the total growth achieved - occurred since the Deepwater Horizon Oil in 2010. in 2011, the TDC received \$6.5 million in marketing grants to spur economic recovery.



# **Tourist Development Taxes - variances by month**



■ 2010 ■ 2011 ■ 2012 ■ 2013



# **Guiding Principles**

# **Guiding Principles**

#### **Brand Position:**

The brand position for Panama City Beach is REAL. FUN. BEACH. This brand highlights the attributes that differentiate it from other destinations – the quintessential, all-American beach community that is built on fun and is home to the "World's Most Beautiful Beaches" and demonstrates that Panama City Beach appeals to a wide variety of audiences that are looking to have fun on their beach vacation.

#### **Core Values**

- Live up to the brands "Real. Fun. Beach." and "World's Most Beautiful Beaches."
- A fun, yet safe place for residents and visitors to enjoy a Florida Gulf Coast experience.
- A great place to visit, a great place to live and work.
- A healthy and diverse economy with travel and tourism at the core.

#### **Mission:**

Promote a positive image for Panama City Beach, increase tourism, and coordinate the marketing efforts of the total tourism community.

#### Vision:

Panama City Beach will be the Gulf Coast's premier, year-round, fun beach destination that offers a quality experience for visitors and residents alike.





# **Guiding Principles**

Panama City Beach's Vision – to be the Gulf Coast's premier, year-round, fun beach destination that offers a quality experience for visitors and residents alike – is ambitious but achievable. To succeed, Panama City Beach must build a strategic marketing platform that aligns the collective interests of the local tourism industry and provides integrated marketing opportunities for the industry to leverage.

In order to ensure that Visit Panama City Beach is maximizing the impact of its marketing resources (money, time and relationships), we have adopted a set of Marketing Principles that drives all strategic thinking:

- Visitor Engagement is Paramount
- All Activities Must Support and Extend Our Brand Real.Fun.Beach.
- Create Value & Add Value
- If It's Worth Doing, It's Worth Doing Right
- Innovation
- Best-In-Class Partnerships



#### Visitor Engagement is Paramount

Though we are blessed with base of fiercely loyal visitors, we are neighbored by beach destinations that also provide a highquality visitor experience, some without the negative stereotypes that we have to overcome. Our sustained growth is only achievable by maintaining our current visitor base, increasing the frequency of their visits to Panama City Beach, further penetrating core Southeastern and Midwestern markets and cultivating emerging markets. To increase frequency of visits, we must enhance our ability to communicate with our core customer and provide them with compelling opportunities to come back to the beach. In order to change perceptions and eliminate objections in our core markets, we must enlist our core customers assistance in being brand evangelists for PCB. As visitation has grown, there has been a natural increase in the number of firsttime visitors to PCB. We need to engage with these visitors, help ensure they have a positive experience at PCB and encourage return visitation.

#### All Activities Must Support and Extend the Brand

With Real.Fun.Beach., we have developed a brand that reflects the nature of Panama City Beach, differentiates us from our competitive beaches, and communicates the central reason that visitors come here throughout the year. Everything the TDC does must communicate and reinforce this brand position.

#### **Create Value & Add Value**

Every Visit Panama City Beach program or initiative must create value and add value for travelers and industry Partners. Visit Panama City Beach programs must provide the local tourism industry a strategic advantage and must inspire consumers with valuable information or a valuable service.



#### If It's Worth Doing, It's Worth Doing Right

Panama City Beach ranks in the Top 10 Leisure Destinations in Florida. We have a quality destination that is worthy of visitation. Everything we do must demonstrate quality and worth, but not extravagance. Understanding wise financial stewardship is critical in all that we do, Visit Panama City Beach will not sacrifice quality to save money; nor will we initiate a new program or continue with an existing program without dedicating the resources necessary to make the program a success. Visit Panama City Beach will protect our brand promise and will commit to do it right or not do it at all.

#### Innovation

The TDC is committed to building a culture of innovation that encourages staff and Partners to create more effective campaigns, initiatives, and programs to give Panama City Beach a competitive advantage.

#### **Best-In-Class Partnerships**

Just as the Panama City Beach tourism industry expects Visit Panama City Beach to create and add value to their independent marketing efforts, Visit Panama City Beach expects our partners to create and add value to our internal efforts. To support greater collaboration, the TDC has revamped its partner engagement activities to help us do our job better. In FY 2015, we will roll out and implement strategic co-op marketing programs and other partner engagement opportunities that leverage public and private sector investments in marketing Panama City Beach as a tourist destination.



Panama City Beach has a loyal visitor base who are fiercely protective of their REAL.FUN.BEACH. experience. They are typically active, diverse and engaged – both while in the destination and through social media channels upon returning home. While the award-winning beach is the main draw, what makes Panama City Beach exceptionally distinctive is its authenticity and dynamism.

The visitor experience is not contrived or overpriced. A number of very successful family-owned businesses offer quintessential Floridian activities and items travelers cannot find at home. Compared to other beachfront communities, Panama City Beach is considered a value destination, worthy of visitors' investment. And no matter the interest (e.g. golf, shopping, ecotourism, fishing, diving, watersports, family attractions, team sports) or time of year, Panama City Beach always has something fun in store.

Continued investment in infrastructure and retail establishments as well as the popularity of annual events and the introduction of new events will make Panama City Beach an increasingly desirable place to visit, live and work. It's what keeps visitors coming back year after year while also attracting new audiences.





# FY 2015 Goals

- Through integrated marketing, social media and public relations campaigns to further leverage awareness of Panama City Beach as a tourist destination to drive additional visitation.
- Develop opportunities to further penetrate core markets through sales, sports marketing and visitor engagement activities to enhance the visitor experience, guest satisfaction, support the brand position of REAL.FUN.BEACH and drive incremental visitation.
- Continue development and support of Sports Tournaments, Festivals and Special Events created to generate incremental tourism demand for Panama City Beach.
- Increase private sector industry participation and engagement in TDC programs.
- At the direction of the TDC Board of Directors, diligently work with public and private sector partners to enhance and develop public venues to spur incremental tourism demand.

#### **Measurements of Success**

- Exceed industry in advertising, marketing, and social media engagement metrics
- Achieve 250 million media impressions
- Exceed budgeted ancillary revenue (co-op marketing/corporate sponsorship) goals
- Increase partner participation in TDC sponsored programs, workshops, and initiatives



# Visitor Profile

VILLIN.







# **Panama City Beach**

# 2014 Visitor Profile & Economic Impact Report

Prepared for:

• Panama City Beach Convention & Visitors Bureau

Study Conducted: January – December, 2014 Presentation of Research & Findings: February 25, 2015 Final Report Submitted: March 30, 2015



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#### Purpose

To document the profile and planning preferences of those who visited Panama City Beach, Florida in Winter, 2013 or Spring/Summer/Fall, 2014 and compare their responses to survey data collected in 2012 and 2013. The survey data in this report covers the period December, 2013 through November, 2014. 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 three-year period 2011 – 2014, to capture visitor perceptions of PCB. Travel industry partners in PCB were provided unique web-links to the online visitor survey that were emailed to their visitor databases. Email recipients were invited to take a visitor survey and be entered into a chance to win one of two \$250 Visa gift cards. Surveys were also collected through the PCBCVB website and visitor inquiry database; or signed-in at PCBCVB Visitor Center 's guestbook.

The number of surveys completed by respondents who identified themselves as leisure visitors to Panama City Beach in Winter, 2013 or Spring/Summer/Fall, 2014 totaled 2,321. Total visitor survey collection over the three-year period 2012 – 2014 is shown below. Responses of those who identified themselves as "did not visit PCB" are also included in the report to provide reasons for not visiting and other destinations selected. Additionally, this report provides data specific to the season respondents identified as their most recent visit to Panama City Beach.

Season	2012	2013	2014	
Winter (Dec – Feb)	567	400	195	
Spring (Mar – May)	787	564	441	
Summer (Jun - Aug)	477	761	1,236	
Fall (Sep – Nov)	225	195	449	
Total Season Responses	2,056	1,920	2,321	









# Panama City Beach

# **PCB Leisure Visitors Seasonal Summary**



#### WINTER Visitor Profile Summary December, 2013 – February, 2014:

- Household Income
  - \$0 \$49,000 22.5%
  - \$50,000 \$99,000 52.1%
  - \$100,000 \$149,000 16.9%
  - \$150,000 \$199,000 6.3%
  - \$200,000 \$249,000 2.1%
  - \$250,000+-0.0%
- Respondent average age is 60
- Travel party:
  - 88% adults only
  - 12% adults traveling with children
- Length of Stay:
  - Winter short-term 5.9 nights
  - Winter long-term 56 nights
- Accommodations:
  - Vacation condo/townhouse; Winter short-term 43.4%, Winter long-term 82.6%
  - Hotel/Motel: Winter short-term 30.3%, Winter long-term 1.8%
- Average Party Spending \$1,454
- Rate PCB overall at 4.4
- 75.3% plan to visit again in the near future while 97.3% would recommend PCB to others

n = 195









#### SPRING Visitor Profile Summary March – May, 2014 (Does NOT Include College Spring Break)

- Household Income
  - \$0 \$49,000 25.4%
  - \$50,000 \$99,000 42.4%
  - \$100,000 \$149,000 24.5%
  - \$150,000 \$199,000 5.5%
  - \$200,000 \$249,000 1.7%
  - \$250,000+ 0.6%
- Respondent average age is 48
- Travel party:
  - 61% adults only
  - 39% adults traveling with children
- Length of Stay 5.2 nights
- Accommodations:
  - Vacation condo/townhouse 52%
  - Hotel/Motel 26.2%
- Average Party Spending \$2,227
- Rate PCB overall at 4.4
- 77.4% plan to visit again in the near future while 96.2% would recommend PCB to others











# SUMMER Visitor Profile Summary June – August, 2014:

- Household Income
  - \$0 \$49,000 **-** 22.2%
  - \$50,000 \$99,000 46.2%
  - \$100,000 \$149,000 21.8%
  - \$150,000 \$199,000 7.1%
  - \$200,000 \$249,000 1.4%
  - \$250,000+ 1.2%
- Respondent average age is 43
- Travel party:
  - 26% adults only
  - 74% adults traveling with children
- Length of Stay 5.6 nights
- Accommodations:
  - Vacation condo/townhouse 56.6%
  - Hotel/Motel 23.2%
- Average Party Spending \$2,463
- Rate PCB overall at 4.5
- 79.8% plan to visit again in the near future while 95.3% would recommend PCB to others











#### FALL Visitor Profile Summary September - November, 2014:

- Household Income
  - \$0 \$49,000 20.6%
  - \$50,000 \$99,000 47.5%
  - \$100,000 \$149,000 22.0%
  - \$150,000 \$199,000 5.8%
  - \$200,000 \$249,000 1.2%
  - \$250,000+ 2.9%
- Respondent average age is 49
- Travel party:
  - 64% adults only
  - 36% adults traveling with children
- Length of Stay 4.8 nights
- Accommodations:
  - Vacation condo/townhouse 51.8%
  - Hotel/Motel 26.5%
- Average Party Spending \$1,607
- Rate PCB overall at 4.6
- 89.1% plan to visit again in the near future while 99.1% would recommend PCB to others









n = 449



Summer 2014 Visitor Respondents Map n=1224





Spring 2014 Visitor Respondents Map n=411 D C A N A SASKATCHEWAN MANITOBA QUEBEC Seattle NORTH MONTANA UNITED S a Onent GALIFORNIA Las Vega os Angeles Choenix San Diedo EIPast Monterrey 02015 SpatialT Gulf of Mexico

Fall 2014 Visitor Respondents Map n=444





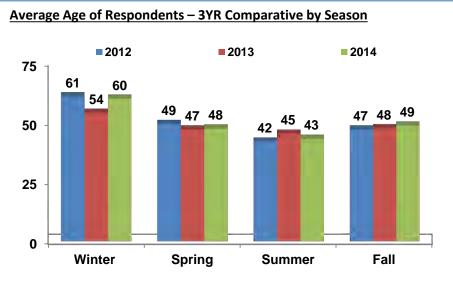




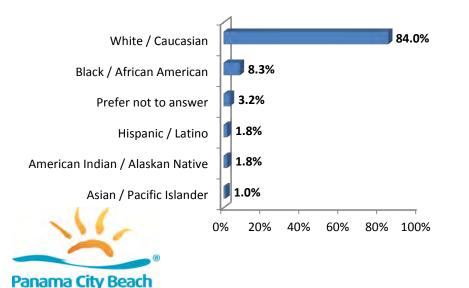
# PCB Leisure Visitors Respondent Demographics

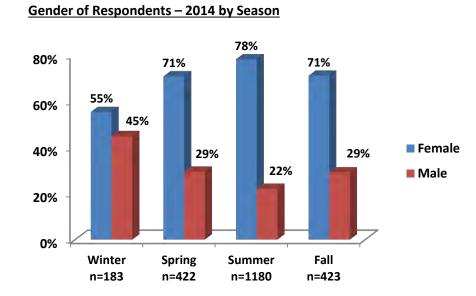






#### **Overall Ethnicity – 2014 Respondents**

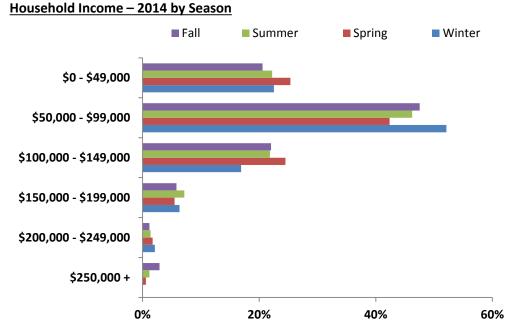




The average age and gender of survey respondents is reflective of the typical travel planner for each season. Typically we see female head of household as the primary travel planner and survey respondent. This is also typical of most leisure travel research. Female head of household is most often the primary travel planner. We also see that men are more involved in winter travel planning which is reflective of the higher age and increased incidence of retirement among winter visitors.

It is interesting to note that the typical age of survey respondents 2012 – 2014 has varied little with the summer season having the youngest age.





Response Category	Winter n=106	Spring n=235	Summer n=699	Fall n=235
\$0 - \$49,000	22.5%	25.4%	22.2%	20.6%
\$50,000 - \$99,000	52.1%	42.4%	46.2%	47.5%
\$100,000 - \$149,000	16.9%	24.5%	21.8%	22.0%
\$150,000 - \$199,000	6.3%	5.5%	7.1%	5.8%
\$200,000 - \$249,000	2.1%	1.7%	1.4%	1.2%
\$250,000 +	0.0%	0.6%	1.2%	2.9%



The household income reported by survey respondents varies by season. In every season the largest income range category was 50k - 100K per year. When we look at the ratio of household income over and under 100K by season we see that at least 1/4to 1/3 of the visitors in every season are over 100K in annual household income. In every season, less than  $\frac{1}{4}$  of the respondents were under 50K in household income.

Response Category	Winter n=106	Spring n=235	Summer n=699	Fall n=235
\$99,000 or less	74.6%	67.8%	68.4%	68.1%
\$100,000K or more	25.4%	32.3%	31.5%	31.9%









# PCB Leisure Visitors Travel Party Characteristics



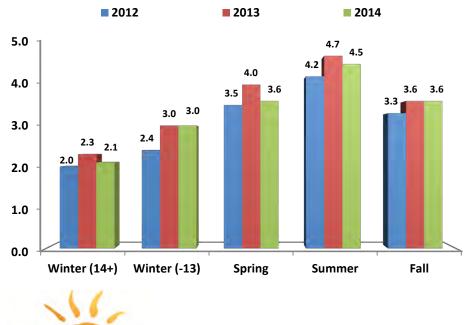


#### **Travel Party Characteristics – 2014**

Panama City Beach REAL, FUN, BEACH

The average travel party size remains fairly consistent in each season year after year as shown in the 3-YR comparative graph below.

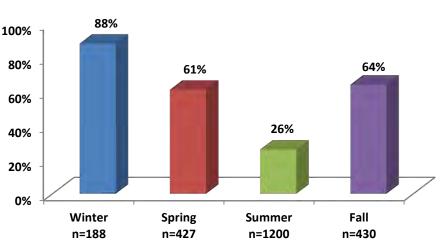
However, there is a significant spike in party size during the summer season when the travel party consists primarily of families of adults traveling with children. This family vs. adults only ratio is further illustrated in the chart on the bottom right with winter highest at 88% adult-only travel parties and summer lowest at 26% adults only. Thus 74% of summer travel parties contain children.



# Travel Party Size

2014 Travel Party Size	Winter	Spring	Summer	Fall
Average # of people sharing accommodations	2.6	3.8	5.0	3.6
Average number of people in travel party	2.5	3.6	4.5	3.6

Adults only travel parties consistently outnumber adults traveling with children across all seasons except summer. The overwhelming majority of winter visitors including short-term and long-term consist of adults only travel parties. The school calendar limits family vacation travel and national research statistics confirm that 2/3 of all travel parties are typically adults only.



Adults Only Travel Party

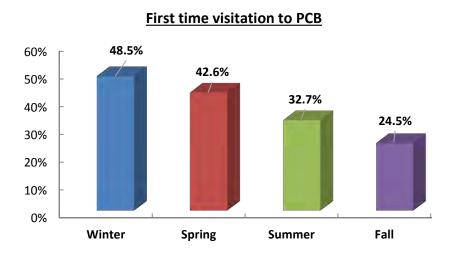


#### Repeat and First-Time Visits to PCB – 2014

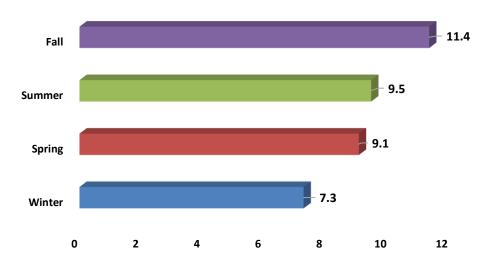
Surveys received from those who inquired to PCBCVB show a dramatic increase in first time visitation to PCB as is seen in the chart at bottom left. This is a strong indication that the PCBCVB advertising program is driving NEW demand into the destination.

Further analysis of the first time visitors indicate that they are coming from a wider geographic area indicating the PCBCVB program is reaching into new markets broadening the visitor base for the destination. First-time visitors came in all seasons of the year and repeat visitors reported an average of 9 prior visits to PCB. Therefore, PCB has a healthy ratio of repeat and first-time visitors to sustain growth in the local tourism economy.





#### Repeat Visitation to PCB - Avg # of Times Previously Visited by Season



YOUNG

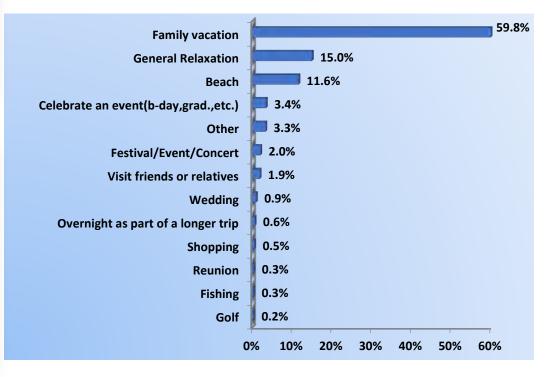




Panama City Beach REAL, FUN, BEACH.

# 2014 Leisure Visitors to PCB

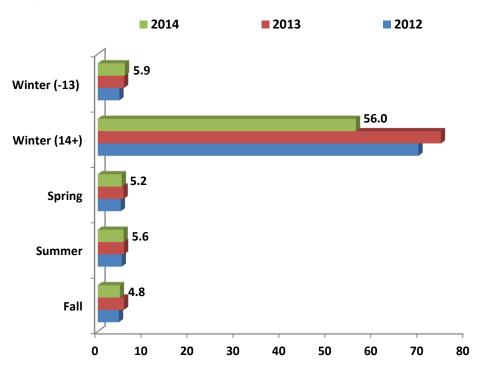
Survey respondents were asked to categorize their most recent leisure visit to PCB. 2,117 visitors responded to the online survey with nearly 60% of them indicating they visit PCB for a family vacation, 15% for general relaxation, and 11.6% for the beach. The response data herein confirms that PCB is a family destination where people come to enjoy the beach and have fun. This data supports the use of "real fun beach" as a destination brand and point of differentiation for PCB.





#### Average Length of Stay

The average length of stay 2012 - 2014 is consistent in each of th4e four seasons. As expected, winter long-term visitors (14+ nights) length-of-stay is significantly longer than any other season. There was a slight decline in length of stay reported in 2014 which is attributed to sampling variance and not an indicator of shorter length of stay. Summer stays tend to be slightly longer than Spring and Fall with a 6-7 night stay reported most frequently. n=2,322













# Panama City Beach REAL FUN. BEACH.

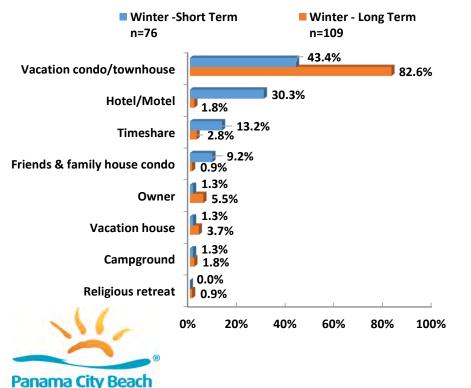
# PCB Leisure Visitors Accommodations

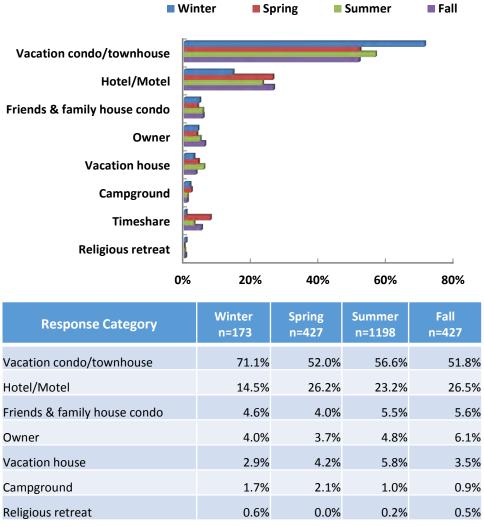


#### **Type of Accommodations**

Respondents were asked to categorize the type of place they stayed in while in PCB. The majority of survey respondents for all seasons indicate they stayed in a vacation condo/townhouse, most often followed by stays in a hotel/motel. Hotel/motel rental was reported highest in spring and fall.

Long-term winter visitors shown in graph below were twice as likely to stay in a vacation condo/townhouse (82.6%) than winter short-term visitors (43.4%). Additionally, only 13% more of the winter short-term visitors stay in a vacation condo/townhouse than a hotel/motel.





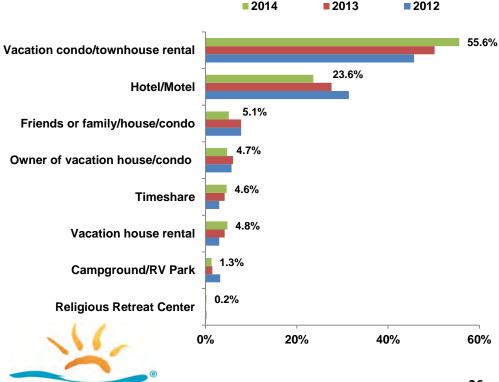


#### Type of Accommodations – 3-YR Comparative

Panama City Beach

The most popular accommodation types visitors specify consistently over a three year period are vacation condo/townhouse followed by hotel/motel. However, survey respondents indicate in all three years they were twice as likely to stay in a vacation condo/townhouse as a hotel/motel. This information is consistent with the inventory ratio in PCB where there are three times as many rental units as hotel rooms.

Accommodation type response averages for the prior three years are shown in the chart below.



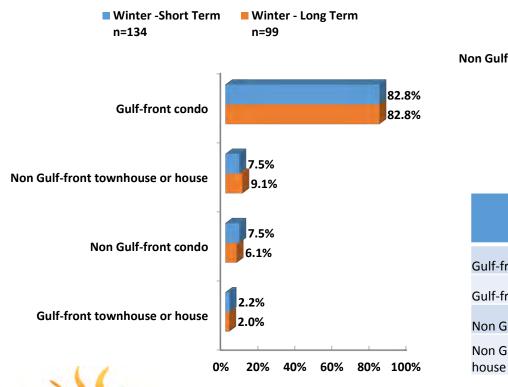




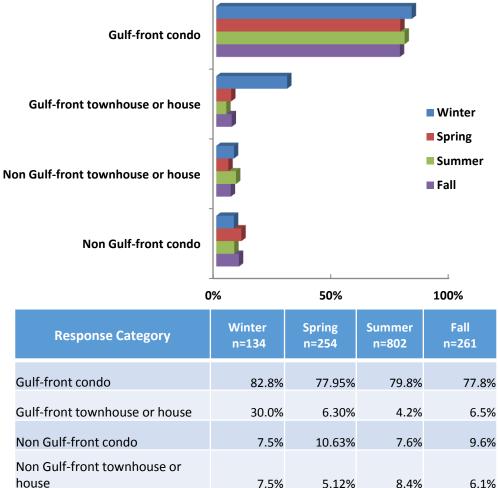
# **2014 PCB Leisure Visitor Profile**

### Type of Vacation Rental Property Accommodations – 2014

The majority of respondents indicated they stayed in gulf-front accommodations across all four seasons. In addition, there is no distinction between short-term and long-term winter visitors that stay in gulf-front condos. The data indicates the vast majority of survey respondents want a Gulf view when they come to PCB.



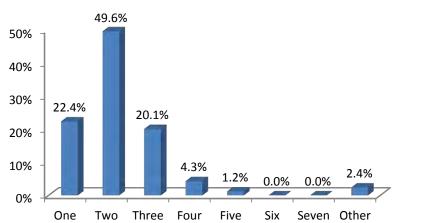
Panama City Beach



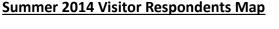


### Number of Bedrooms in Vacation Rental Unit - 2014

Survey respondents reported staying in two bedroom condominiums most often which matches up to the inventory in PCB.



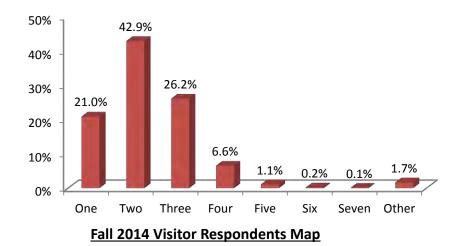
### Winter 2014 Visitor Respondents Map

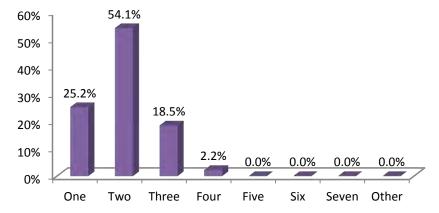


REAL, FUN, BEACH.



### Spring 2014 Visitor Respondents Map





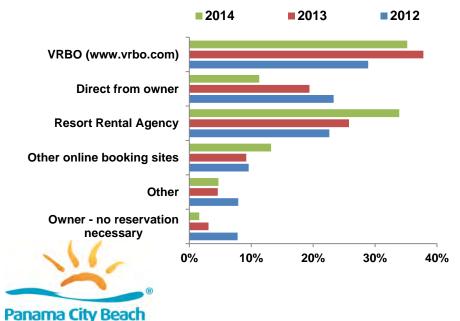


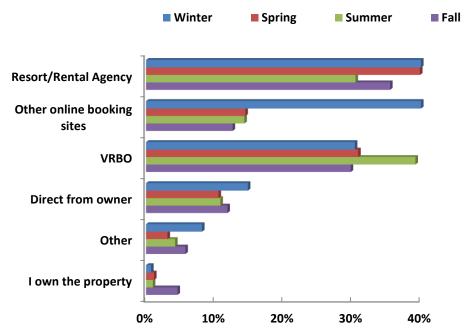
# **2014 PCB Leisure Visitor Profile**

### Vacation Rental Reservations – 2014 & 3-YR Comparative

Survey respondents were asked how they reserved their vacation rental. As seen in the chart and table to the right, respondents in all four seasons indicated the two top rental reservation methods were with a resort/rental agency or VRBO. This data is consistent in rank order with slight variances in response over the prior three years. The exception was the winter visitor indicating they used a resort/rental agency and other online booking sites equally followed by VRBO. Winter visitors have the highest incidence of repeat visitation and thus have established a pattern that is repeated annually.

The 3-Year comparative chart below shows the top three booking sources used to reserve the vacation rental are VRBO, a resort rental agency and direct from owners across multi years. However, the booking trend demonstrates a pattern of vacation rental reservations increasingly made through VRBO.





Response Category	Winter n=135	Spring n=256	Summer n=804	Fall n=262
Other online booking sites	40.0%	14.5%	14.3%	12.6%
Resort/Rental Agency	40.0%	39.8%	30.5%	35.5%
VRBO	30.4%	30.9%	39.2%	29.8%
Direct from owner	14.8%	10.5%	10.8%	11.8%
Other	8.1%	3.1%	4.2%	5.7%
I own the property	0.7%	1.2%	1.0%	4.6%







# Panama City Beach

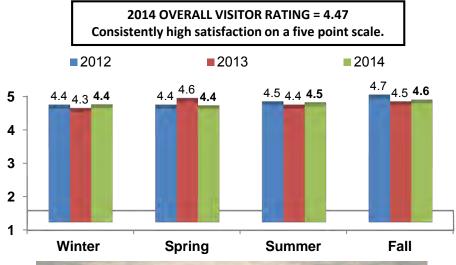
# **PCB Leisure Visitors Satisfaction Ratings**



# **2014 PCB Leisure Visitor Profile**

### **Overall PCB Visitor Satisfaction Ratings – 3-YR Comparative by Season**

Respondents consistently report a high overall visitor satisfaction rating for Panama City Beach for all seasons year after year.





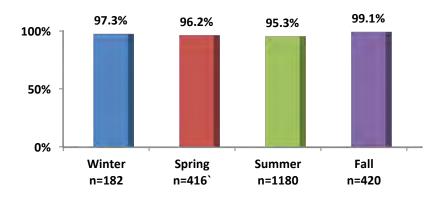




### **Recommending PCB to Others**

When 2014 respondents were asked if they would recommend PCB to others, they consistently report they will recommend PCB as a vacation destination across all seasons; the highest recommendation coming from Fall visitors.

### Would Recommend





### PCB 2014 Visitor Amenities Rating

Survey respondents ratings of a list of PCB amenities remain consistently high with only slight variances noted by season. Respondents were asked to rate the following amenities on a five-point scale where 1 is low, 3 is average and 5 is excellent. Average ratings over 4.0 are desired which is the case for most of the amenities in PCB. Ratings of 4.3 or higher are noted in bold while ratings below 4.0 are noted in red font and should be singled out as opportunities for improvement. Traffic is consistently identified as an issue except in the winter months with visitation is slowest.

Response Category	ALL	Winter	Spring	Summer	Fall
Quality of beaches	4.59	4.73	4.58	4.53	4.70
Range of choices for dining out	4.43	4.36	4.33	4.46	4.49
Attractiveness/landscaping of the destination	4.39	4.23	4.34	4.40	4.47
Quality of your accommodations	4.36	4.31	4.36	4.34	4.42
Variety of shopping & merchandise	4.36	4.36	4.23	4.38	4.46
Quality of dining out	4.35	4.26	4.27	4.36	4.42
Overall appeal of the attractions in the area	4.34	4.16	4.26	4.37	4.42
Ease of finding visitor information	4.28	4.20	4.23	4.29	4.34
Signage and wayfinding	4.25	4.19	4.19	4.26	4.32
Variety of children's activities	4.22	4.07	4.03	4.26	4.28
Lodging value you received for the price paid	4.21	4.30	4.26	4.15	4.28
Level of service / employee training	4.17	4.21	4.15	4.13	4.29
Night life	4.15	3.95	4.04	4.19	4.25
Ease of traffic	3.63	4.14	3.62	3.47	3.87









### **PCB Message Testing**

Each year the visitor profile survey contains some questions to test advertising messages and/or content to provide insight for the marketing efforts of PCBCVB. The 2014 visitor profile survey asked respondents to indicate their level of agreement with five different messages related to their primary motivations for visiting Panama City Beach. The 4-point scale for rating each phrase included 1 = totally disagree and 4 = totally agree. Therefore the higher the rating the higher the agreement with the statement.

The data herein confirms the current PCBCVB marketing and brand message "Real Fun Beach" is accurate and on point as the statement "a fun time with family / friends" followed by "a beautiful white sand beach" rated highest in agreement among survey respondents.

I WENT TO PCB FOR:	ALL n=	Winter n=	Spring n=	Summer n=	Fall n=
A fun time with family / friends	3.90	3.81	3.90	3.91	3.92
A beautiful white sand beach	3.88	3.94	3.87	3.86	3.92
A fun time with kids	3.76	2.74	3.64	3.85	3.74
A quiet/serene beach	3.43	3.74	3.37	3.35	3.61
An activity filled beach	3.26	2.53	3.22	3.37	3.24











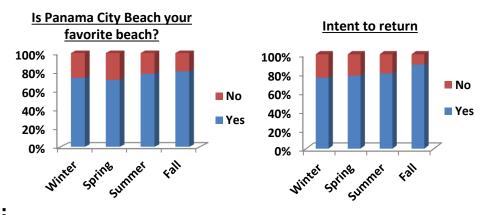
# **2014 PCB Leisure Visitor Profile**

### **PCB Popularity**

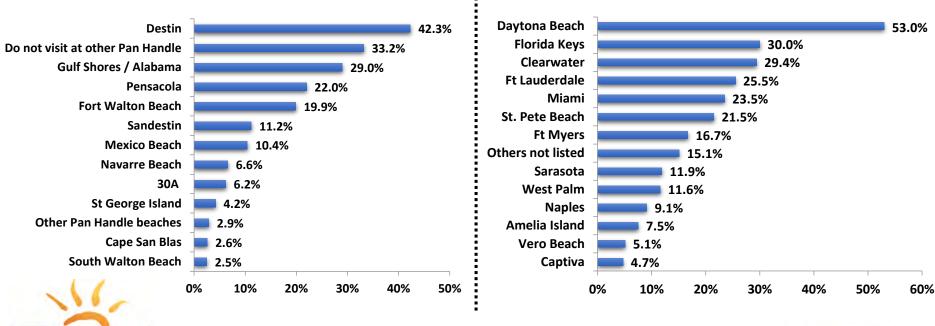
Panama City Beach

The majority of survey respondents identify PCB as their favorite beach destination (see chart on right) and have incredibly high intent to return (see chart on far right).

However, it must be noted that 73% of survey respondents have visited other beaches indicating the need for PCBCVB to continue aggressive marketing to keep them coming back. The charts below identify the Florida beaches that have been visited by survey respondents indicating these as your competitive set. PCBCVB must continue aggressive marketing to repeat and first-time visitors as the confirms they will go elsewhere if you don't remind them to come to PCB.



### Other Florida Beaches Visited n=1518



YOUNG

### Other Panhandle Beaches Visited n=2114





# Panama City Beach REAL FUN. BEACH.

# PCB Leisure Visitors Spending Data



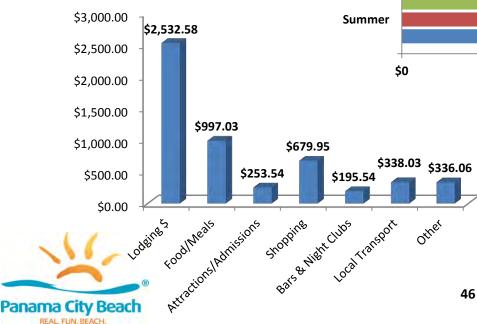
# **2014 PCB Leisure Visitor Profile**

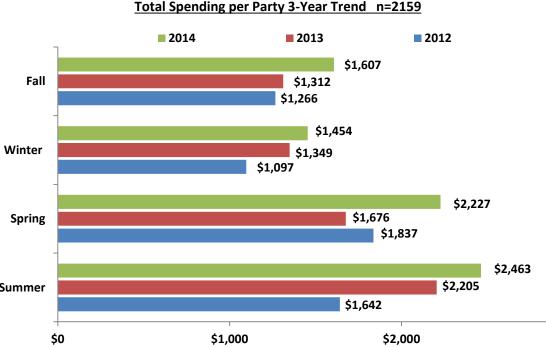
### Total 2014 Spending per Party by Season

Total spending per party increased in 2014 as reported by respondents for all four seasons in PCB. The chart on the right compares average spending per travel party by season over the last three years. The chart at the bottom reveals the winter season typical party spending in 2014 and is followed on the next page by the seasonal spending charts for the four seasons.

The rank order of travel party spending by season is **W** Summer (\$2,463), Spring (\$2,227), Fall (\$1,607) and winter (\$1,454 – short term only). Winter long term travel parties spend the least per day but stay the longest and have the highest overall spending per party.

Winter (long term) 2014



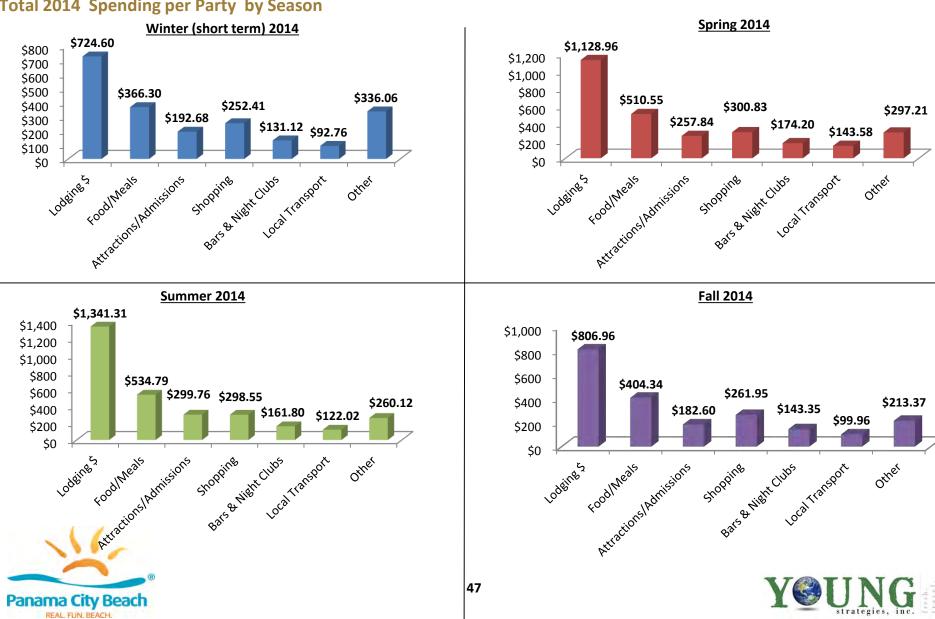


As expected, long-term winter respondents reported spending significantly more for lodging (\$2,532)with an average stay of 56 nights. The charts on the next page show the spending in each of the four seasons. Summer and Spring have the longest length of stays (excluding winter long-term) and pay higher rates for lodging than Fall and Winter short-term stays.



\$3,000

# **2014 PCB Leisure Visitor Profile**



### Total 2014 Spending per Party by Season





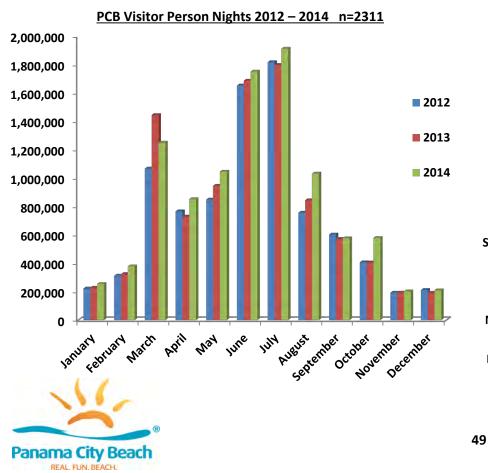
# Panama City Beach

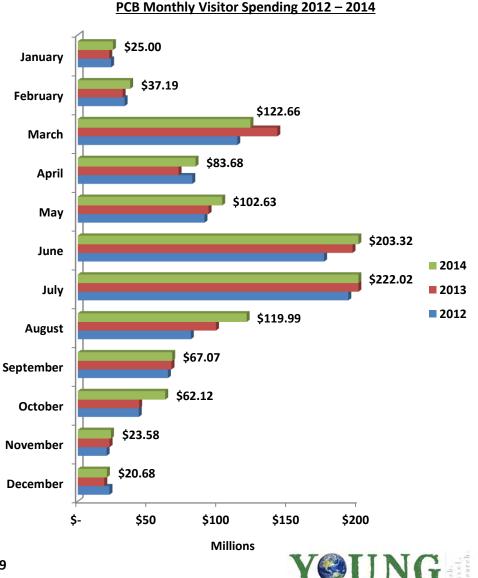
# PCB Leisure Visitors Economic Impact



## 2012 – 2014 Person Nights and Total Monthly Spending

YSI developed an economic impact model to calculate the number of visitors and total spending to PCB based on the data provided in visitor surveys (party size, spending, length of stay, size and type of accommodations occupied) and data provided by the Bay County Tax Office (inventory of accommodations by room count, revenue from accommodations by room count). The data herein shows that visitors to PCB and total spending have increased year over year.





### 2012 – 2014 Visitor Spending Calculation (Those who stayed in paid/taxed overnight lodging)

The following calculation of total overnight spending is based on an economic impact model developed by YSI to calculate spending based on the data provided in visitor surveys (party size, spending, length of stay, size and type of accommodations occupied) and data provided by the Bay County Tax Office (inventory of accommodations by room count, revenue from accommodations by room count).

The table below reveals actual tourist development tax revenue and total lodging revenue as reported by the Bay County Tax Office. YSI then calculated the spending, days/nights, travel parties and occupancy using the Tax Office data by unit size and online visitor survey response data. The calculations reveal growth in occupancy (4.3%), travel parties & visitor days/nights (6.5%) and overall travel party spending (9.1%).

### Total Annual Visitor Spending Based on visitors who stayed in taxed Overnight Lodging

	2012	2013	2014	VAR.
Tourist Development Tax Revenue	\$14,674,649	\$15,832,629	\$17,003,107	7.4%
Total Taxed Lodging Revenue	\$293,492,971	\$316,652,587	\$340,062,140	7.4%
<b>Total Visitor Spending</b> (from taxed lodging)	\$940,682,598	\$1,014,912,137	\$1,106,945,863	9.1%
Average Daily Spending Per Person	\$106.09	\$108.31	\$109.19	0.8%
Visitor Days/Nights	8,866,857	9,370,464	9,981,933	6.5%
Visitor Travel Parties	2,216,714	2,342,616	2,495,483	6.5%
Overall Annual Occupancy	38.5%	39.5%	41.2%	4.3%



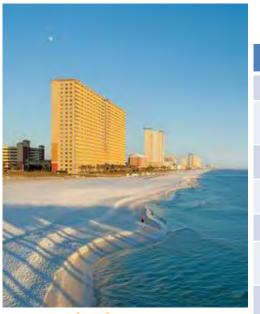




## 2012 – 2014 Visitor Spending Calculation (Rental property Owners & Friends who did not pay for overnight lodging)

The following calculation of total overnight spending of rental unit Owners, Family & Friends is based on an economic impact model developed by YSI to calculate spending based on the data provided in visitor surveys (party size, spending, length of stay, size and type of accommodations occupied) and data provided by the Bay County Tax Office (inventory of accommodations by room count).

The table below reveals total rental unit inventory as reported to the Bay County Tax Office. Using survey responses from owners, family and friends YSI calculated the spending, days/nights, travel parties and occupancy using the online survey response data. The calculations assume no growth in occupancy, travel parties & visitor days/nights as none was seen in the survey response data. The surveys indicate that owners have a set pattern of visitation and increased occupancy by paid rental visitors as well as tax code limits somewhat constrain owners ability to use their units more often. The surveys indicated a slight increase in owners overall travel party spending.





Based on owners & friends/family who did NOT PAY for overnight lodging				
	2012	2013	2014	
Condo / Home / Townhome Inventory (est.)	16,150	16,150	16,150	
Total Annual Inventory (condo, home townhome X 365)	5,894,750	5,894,750	5,894,750	
Estimated Occupancy Rate (owners, friends, family)	6.75%	6.75%	6.75%	
Typical Travel Party Size (owners, friends, family)	5	5	5	
Visitor Days/Nights	1,994,525	1,996,948	1,996,948	
Average Daily Spending Per Person (2012/2013 Visitor profile)	\$58.11	\$60.70	\$61.91	
Total 2012 Spending by Owners, Family & Friends (est.)	\$115,901,848	\$121,214,713	\$123,631,020	



# **2014 Visitor Economic Impact**

### 2012 – 2014 Visitor Spending Calculation

The following calculation of total visitor spending is based upon overnight spending of those who paid for overnight lodging/rentals and the rental unit Owners, Family & Friends reported spending.

The table below provides estimated spending by season for paid and non-paid lodging in the PCB rental unit inventory. YSI makes this calculation based on visitor survey data and Bay County Tax Office reports for taxed overnight lodging in PCB. The final spending estimates reveal an increase of 8% in total visitor spending in 2014 compared to 2013.







### 2014 Estimated Total Visitor Spending in Panama City Beach

	Non-Taxed Lodging (owner/friend use)	Taxed Lodging	
Winter	\$17,847,260	\$84,167,003	
Spring	\$27,645,756	\$313,785,505	
Summer	\$56,891,266	\$553,841,640	
Fall	\$21,246,738	\$155,151,174	
Total	\$123,631,020	\$1,106,945,863	
Grand Total 2014 Visitor Spending estimate	<u>\$1,230,576,883</u>		

\*Total visitor spending increased 8%



# **Visitor Spending - Overview**

	Paid Lodging	2 <sup>nd</sup> Home Use	Total
Taxed Lodging Revenue	\$ 340,062,140	n/a	\$ 340,062,140
Total Visitor Spending	\$ 1,106,945,863	\$123,631,020	\$ 1,230,576,883
Average Daily Spending	\$ 109.19	\$ 61.91	\$ 102.73
Visitor Days/Nights	9,981,933	1,996,948	11,978,881
Visitor Travel Parties	2,495,483	399,390	2,894,873
Annual Occupancy	41.2%	n/a	41.2%



# **Operations Strategy**

# **Operations Overview**

IMPORTANCE	In addition to the functional departments that destination marketing activities of promoting Panama City Beach as a tourist destination, the TDC Operations Department is responsible for overseeing beach renourishment, beach maintenance, landscaping select areas within the tourist corridor, as well as ensuring available resources are used in accordance with established policies, procedures and are accounted for properly.
	To increase departmental efficiency and accountability, expenditures that span multiple departments, or those expenditures that fall under the direction of the President's Office are including within the Operations Department. These include all accounting, administrative functions, payroll, research, share supplies, etc.
APPROACH	The TDC takes its responsibility for managing and expending tourist development tax funds very seriously. We have implemented polices, practices and procedures that make certain the checks and balances are in place to ensure funds are used in an appropriate manner.
TACTICS	<ul> <li>Articulate established policies and procedures to all members of the TDC staff to ensure compliance.</li> <li>Follow established standards for accounting, financial management, human resources, record</li> </ul>
Panama City Beach	<ul> <li>creation and retention.</li> <li>Continually review established policies and procedures to ensure they provide the framework and appropriate guidance necessary for staff to achieve their operational responsibilities. If revisions, clarifications, or additions are needed, work with the Board of Directors to facilitate the changes.</li> </ul>

# **Operations Overview – (cont)**

# TACTICS

- Regularly communicate with members of the Board of Directors on issues relating to the operation of the TDC.
- Work with appropriate members of the TDC staff to ensure all contracts for work to be performed are properly negotiated and monitored in order for the expected result of the contract to be achieved.
- Work with TDC staff to ensure shared resources within the Operations Budget are effectively utilized across all departments.
- Work with TDC staff to ensure all budgets are maintained and expenditures are within the parameters established by the Board of Directors.



# Marketing & Communications Strategy

# IMPORTANCE

Marketing Panama City Beach as a tourist destination is the primary activity of the TDC, accounting for 40% of the entire budget. For FY 2015, the Panama City Beach CVB will continue to grow the REAL.FUN.BEACH. brand by tying the marketing campaigns directly to the brand. The campaigns will seek to build loyalty and brand evangelism among current visitors, as well as attract new visitors to the market. We will utilize the five stages of travel—Dreaming, Planning, Booking, Experiencing and Sharing.

# **APPROACH**

To achieve our goals, we will focus on an integrated approach that leverages that activities of the operational departments, as well as our industry partners to help communicate our story through a variety of media and messages.

**Traditional Media** – Digital, television, radio, and print advertising will comprise the majority of our traditional media campaigns. The campaigns, based on the brand position of REAL.FUN.BEACH. will highlight how Panama City Beach offers consumers authentic, fun experiences with friends and family on vacation.

**Interactive Marketing** - via search engine optimization, marketing for VisitPanamaCityBeach.com, mobile marketing and deployment of monthly e-newsletter to our database are all core strategies for the upcoming year. We will also leverage our social media outlets, including Facebook, Instagram, Twitter and Pinterest.

**Social Media** – The TDC's website is a conduit for visitors to connect with the TDC and experience usergenerated content across a variety of social media platforms. Engagement on Facebook remains high, with over 400,000 fans. Twitter, Google+, YouTube, Instagram and Pinterest continue to see marked growth.



# Marketing Overview – (cont)

### APPROACH

**Public Relations** - In conjunction with Lou Hammond & Associates (LHA), the TDC's public relations agency for the U.S. and Canada, we will continue to generate content to extend the Real.Fun.Beach. and Panama City Beach's unique selling proposition. The TDC will conduct media FAMs and conduct media missions to targeted cities throughout the year.

Video Content Creation - The TDC will continue to create a video library showcasing the Panama City Beach experience, as well as underwrite a syndicated outdoor show that explores the myriad of recreational experiences available in Bay County.

# TACTICS

The Specific media recommendations and marketing tactics that were approved by the TDC Board of Directors in November, 2014 follow.



# **Opportunities**

- Increased visitation levels in FY 2014 provide strong base to build on.
- Increased airlift opens up new markets/audience segments.
- Established & new special events provide solid reasons to visit in Spring, Fall and Winter.
- Increased consumer e-database and social media followers provide re-marketing options.
- Bucket List participants can serve as brand ambassadors for the destination.
- New quarterly PCB Visitor Guide/Magazine.
- VISIT FLORIDA and Brand USA partnerships.



# **Obstacles**

- Low brand awareness outside primary SE markets.
- March Spring Breakers continue perception as non-adult destination.



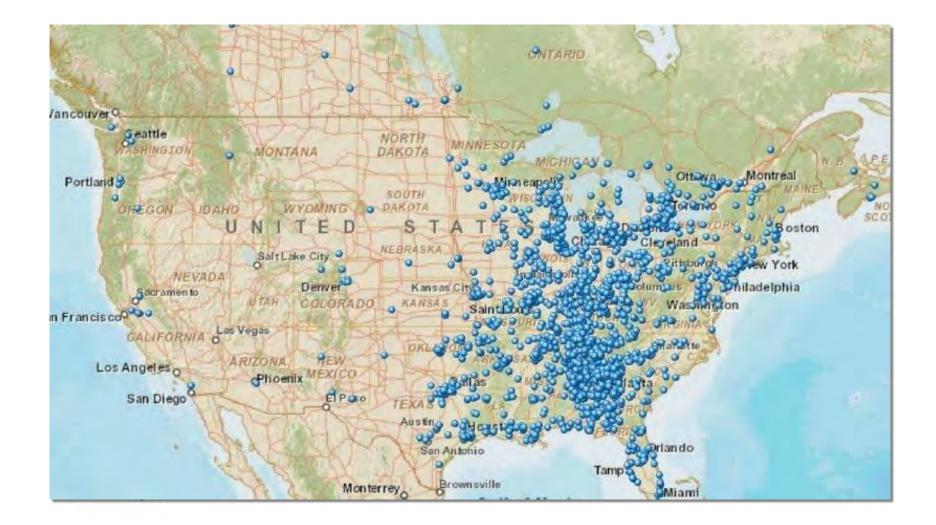
# **Primary Target Audiences**







# **Target Markets**



# **Primary Strategies**

- Re-energize the Real.Fun.Beach brand campaign by sharing compelling stories with current and potential visitors.
- Continue brand presence in primary and secondary target markets to encourage greater frequency of visitation to Panama City Beach.
- Shift local media including online and out-of-home along with Visitor Guide messaging to build anticipation of and attendance at special events.
- Execute special event campaigns a minimum of 2 months prior to event start date to build visitation levels before, during and after the event.
- Develop new online and offline cooperative opportunities for local partner participation.
- Create market explosion campaigns in primary and emerging markets to build engagement with and visitation levels from first-time visitors.
- Integrate brand, seasonal and event messaging platforms to build message consistency in all marketing efforts.
- Support new non-stop flights into PCB from Dallas/Ft. Worth, Houston, Orlando and Tampa.
- Reach out to current visitors to share photo/video content while in Panama City Beach.
- Continue media missions, group and individual FAM trips to drive feature article placements.
- Negotiate broadcast features and promotions to extend destination's brand exposure.
- Support TDC operational departments.



# **Communication Objectives**

- Create awareness, destination consideration and demand among the primary target audience segments.
- Reintroduce audience to the "FUN" side of the Panama City Beach to overcome brand hesitation and objections.
- Build engagement levels among core visitor groups through sharing of user-generated content.
- Protect and grow market share among core and secondary drive markets while expanding into emerging markets.
- Drive visitation to Panama City events year round.
- Encourage new visitors to include PCB in their vacation plans while ensuring continued planning activity among repeat visitors.
- Drive traffic to www.visitpanamacitybeach.com, Sign up for newsletter, Follow social media channels



# Leisure Targets





# The Five Stages of Travel





Maintain marketing presence throughout the year and ensure a strong presence within each market by incorporating multiple touch points:

*Digital media (online & mobile)* efforts will create foundation for year-round communication, enabling connection across **all stages** of travel planning and the visitor journey.

*Television* will be incorporated during key <u>seasonal</u> planning periods to increase awareness in **dreaming** and **planning** stages encouraging the audience to put PCB in its consideration set.

Utilize *radio* to drive event awareness and attendance delivering on **planning** and **experience** stages.

Complement with *magazines* focused within relevant content to engage them at both dreaming and planning stages.

Explore alternative *out-of-home* and *cross-media partnerships* that demonstrate PCB's "FUN" side to engage audiences at the different stages of travel planning depending on execution.



# **Airline Partnerships**

- In support of Southwest flights we will continue our partnership with <u>SWA.com</u> as well as Spirit Magazine.
- With the introduction of new service by United Airlines (Houston), Southwest (Dallas), Silver Airways (Orlando & Tampa) programs will be developed to enhance each airlines new service launch plans and PCB's PR efforts.
- Overall, programs will be designed to increase site traffic for PCB with a secondary goal of increasing flight booking to ECP.



# **Sponsorships**

- PCB official sponsor of the Alan Jackson 2015 25th Anniversary concert tour.
- Promote appearance at Fall 2015 Chasin' the Sun Music Festival.
- Branded digital photo booth with beach-oriented green screen.
- #RealFunBeach hashtag incorporated into shared digital photos.
- Destination sponsorships in Alabama (Toad Lick Music Festival) and Tennessee (Bannaroo).
- Broadcast promotions in key regional drive markets.
- Collect email addresses to build consumer e-database.







# Niche Marketing

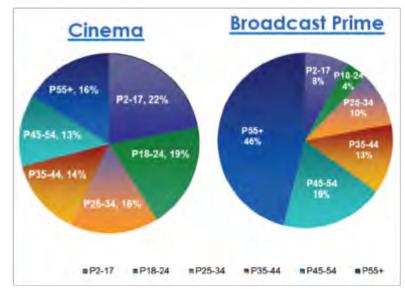
- Develop outdoor lifestyle online and offline television 13-episode series titled "Chasin' the Sun."
- Partner with established outdoors TV cable network to run beginning 1st quarter of 2016.
- Will also live on destination website/You Tube Channel.
- Promoted via social media posts with links to episodes.





## Cinema Strategy

- To round out this approach we are recommending cinema buys launched around key movie releases like The Avengers, Minions, and Pitch Perfect 2.
- Cinema is an effective vehicle for connecting with each of the target audiences and by launching around specific releases we can ensure we are reaching the right users.\*
- Target markets would support Television by including: Birmingham, Huntsville, Atlanta, Columbus, Macon, Lexington, Louisville, Knoxville, Nashville. In addition we will be able to include key markets in Texas as well (Dallas and Houston).
- Cinema allows PCB to connect with an active audience with disposable income in an entertainment environment.
- Movie goers index 55% higher than the average American in vacation travel.\*\*



\*\*Source: MRI Doublebase 2013, Base A18+, Frequent Moviegoer = 1+ times a month

\*Source: Nielsen Jan - Dec '13



## **Paid Search**

- Reconfigure paid search segments to match current geographic and demographic visitation trends based on 2014 research insights.
- Add YouTube to current paid search program to grow from current 20% impression level.
- Includes both in-stream and in-display advertising.
- In-display advertising allows keyword targeting on current YouTube travel channels.
- Provides ability to target potential visitors via demographic profiles of sex, age and interests.





## Special Event Approach

Create media strategy to support events by level of involvement/ownership



PCB Invested Events

> Remaining Events



## 2015 Special Event Groups

Events-A

- Mardi Gras-February
- Chasin' the Sun Music Festival w/Alan Jackson-September
- Pirates of the High Seas Fest-October
- Thanksgiving Week-November

### Events-B

- Seabreeze Jazz Festival-April
- Emerald Coast Cruizin'-November
- Beach Ball Drop-December

### Events-C

- Gulf Coast Jam-September
- Seafood Festival-October
- Ironman Triathlon-November

### Events-D

- Summer Concert Series-June-August
- Star Spangled Spectacular-4th of July
- Fall Fishing Challenge-September
- Thunder Beach-Spring & Fall



The over-arching PCB strategy is to reach consumers when they are in the five stages of the travel planning cycle.

The event strategy will be focused on Planning, Experiencing and Sharing:

- Reach users with relevant placements to make PCB top of mind when they are **PLANNING** their get-away.
- Once we resonate with the target audiences, our goal is to encourage **SHARING** (both in and out of market) throughout each stage of the planning cycle via social media executions.
- We can speak to visitors while they are **EXPERIENCING** PCB by delivering messages tailored to the event to drive participation while in the area or possibly extending their trip to participate.



## Media Approach: PCB Owned Events

- Target core markets with digital audio and traffic radio to effectively reach the desired audience.
- Utilize a top-performing online network partner to capitalize on the aggregated cookie data
- reflecting past PCB website user and the potential past PCB visitors.
- Make use of the strong social following by promoting event information and building interest among
- the PCB fan base.
- Begin reaching users one season prior to the encouraging trip planning with drive market media
- ending the day prior to the event.
- Rotate event messaging in to existing media where appropriate (ex. SWA.com, local billboards).

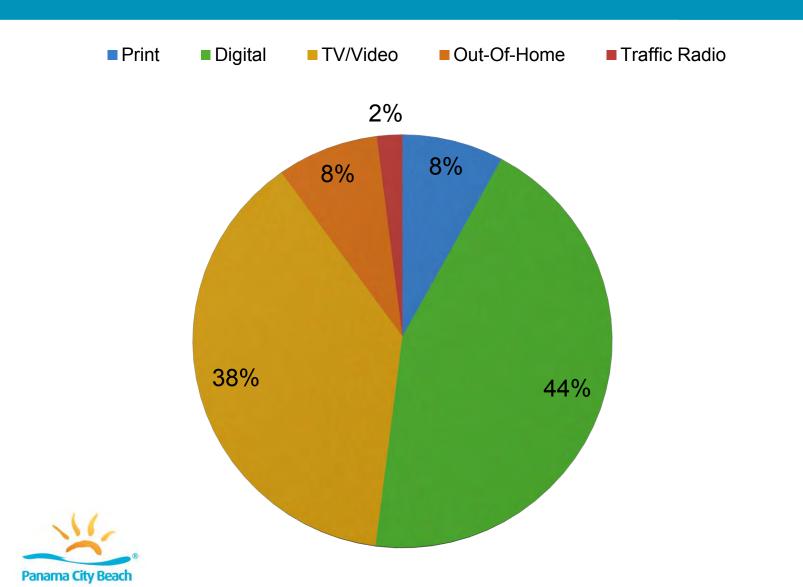


## Media Approach: PCB Invested Events

- Target core drive markets with traffic radio to effectively reach the desired audience.
- Make use of a strong social following by promoting event information and building interest among
- the PCB fan base .
- Begin reaching users one season prior to the encouraging trip planning with drive market media
- ending the day prior to the event.
- Rotate event messaging in to existing media where appropriate (ex. SWA.com, local billboards).



## Choreographed Media Mix

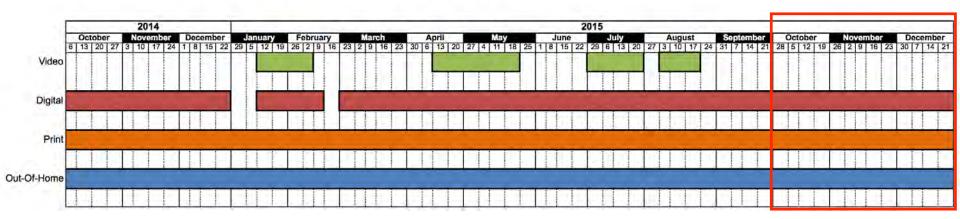


80

## Media Flowchart

This chart reviews total FY15 as well as the end of the calendar year

-The months falling within the red box will be funded by FY16 budget





## **Digital Solutions**

Apply responsive design to current destination website. Will provide same content to potential visitors on all computers and mobile devices. Updated 3.0 CMS to simplify site content changes moving ahead.





# PCB POV

This campaign is about human perspective. Literally, figuratively, and emotionally. It is about capturing the many perspectives of those who "want their Real. Fun. Beach" as they are finally, blissfully experiencing their own personal vision of PCB fun. It is a perspective from not only the eyes, but from the soul on how meaningful, memorable, fun PCB experiences impact you, revive you, and stay with you.

## TV/ Online Video

## :30 TV/Video: "Dear Cubicle"

### VIDEO:

lock-down of person sitting at the edge of the water, kids play in the distance

### PANAMA CITY BEACH LOGO



AUDIO: SFX: AMBIENT

VO: Dear cubicle,

We've been through a lot together.

Late nights.

Vending machine lunches

I spend more hours with you during the week than I spend with my kids.

So, I'm going to be perfectly honest here.

I do NOT miss you right now.

Not even a little bit.

"Gain a whole new perspective on what a beach vacation can be...at Panama City Beach."

## TV/ Online Video

## :30 TV/Video: "Jet Ski Mom"

### VIDEO

Open to point-of-view of mom as she rides across the waves on a jet ski on a beautiful, sunny PCB day.

Jet ski crosses over a boat's wake

Type treatment: PCB POV

logo/tag: Panama City Beach Real. FUN. Beach.

VisitPanamaCityBeach.com





AUDIO SFX: jet ski motor, water splashing, jet ski skimming across water

FEMALE VO:

Somewhere, a mom is packing a lunch. And fighting traffic to make it to daycare in time.

And buying snacks for the soccer team.

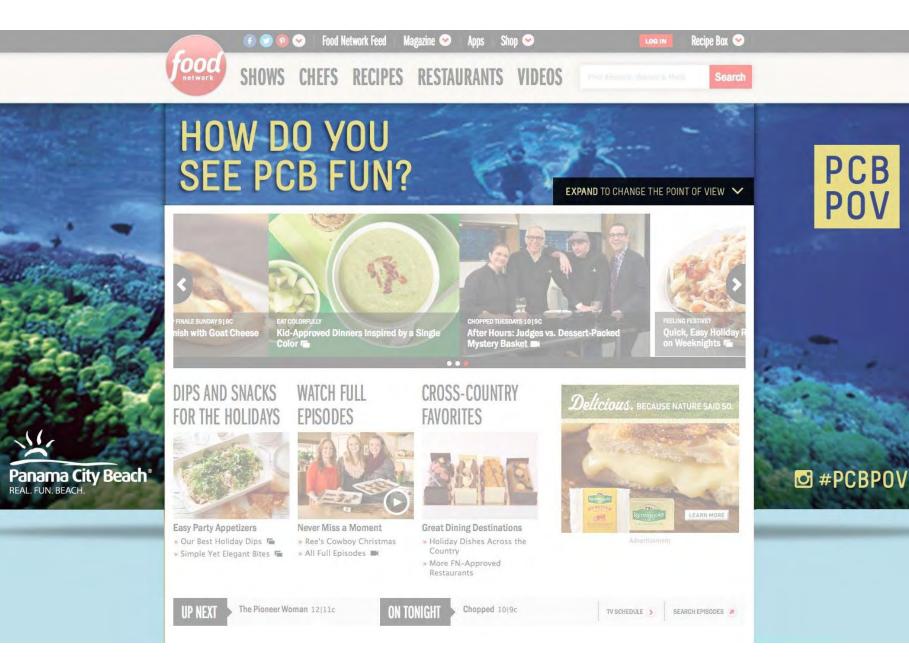
And trying to prepare a presentation from home...WITH a sick kid.

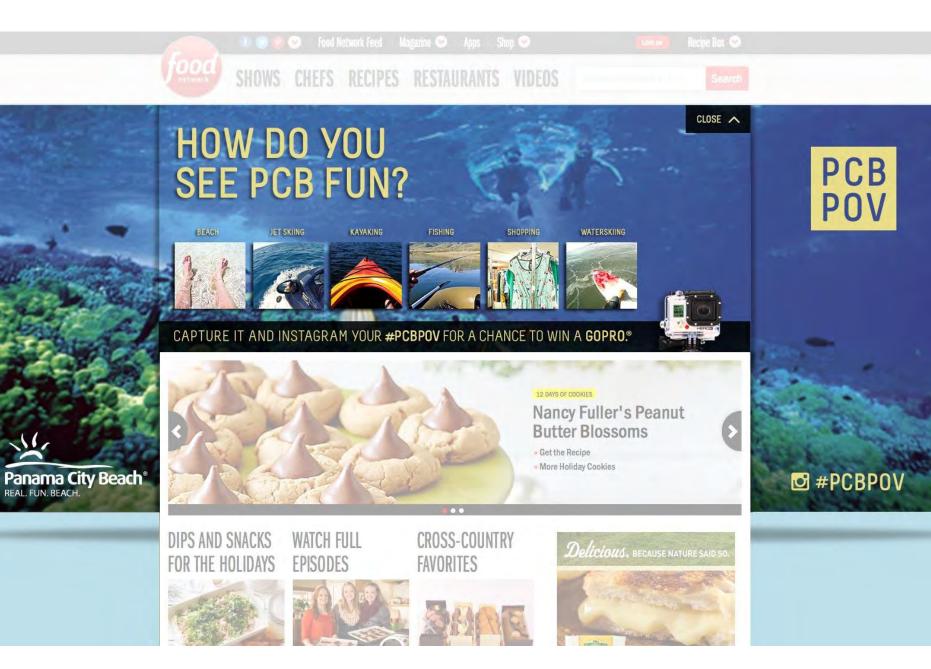
Today...I am not that mom. (pause)

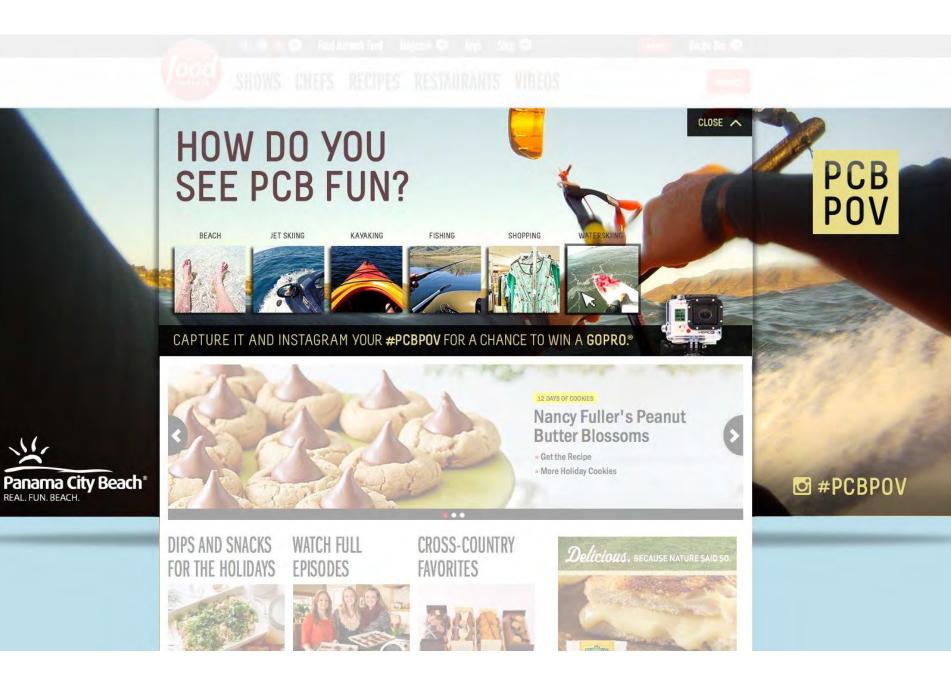
Woohoooooo! (as she rides the jet ski across a boat's wake)

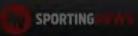
ANNCR VO: See fun your way.

At Panama City Beach











Home Video Power Ratings Schedule/Odds ATS Standings Matchups Latest News

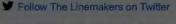
Login: SN Facebook Register



### Les Miles clear favorite to become next Michigan coach

Harbaugh brothers near top of odds board





By: Marcus DiNitto | More Experts Published: Dec 02, 2014

With reports that Brady Hoke will not be back on the Michigan sidelines next year, here are mock odds for who'll be hired as the new head coach of the Wolverines.

We stress the term "mock" because wagering on such

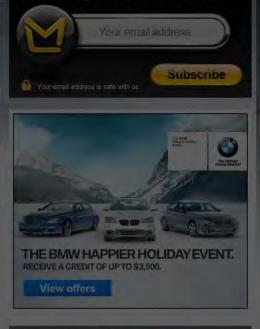
things is not allowed in Las Vegas.

Still, The Linemakers on Sporting News' picked the brains of SN's college football editors and writers, who helped us come up with a list of odds for potential candidates.

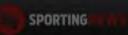
Les Miles, who we open as the 5-to-1 chalk, "has to be the favorite," SN's Bill Bender tells The Linemakers. "This is his third chance. It's time." Miles played offensive line at Michigan under legendary coach Bo Schembechler.

Greg Schiano, who's had head coaching gigs with Rutgers and the Tampa Bay Bucs, is the only other candidate we list at single-digit odds.

Get exclusive info and picks from "The Quants," the Line of the Day, and all the latest bettor information delivered straight to your inbox every weekday.



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# LINEMAKERS

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### Les Miles clear favorite to become next Michigan coach

Harbaugh brothers near top of odds board





Les Miles

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By: Marcus DiNitto | More Experts Published: Dec 02, 2014

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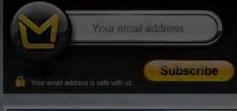
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Les Miles, who we open as the 5-to-1 chalk, "has to be the favorite," SN's Bill Bender tells The Linemakers. "This is his third chance. It's time." Miles played offensive line at Michigan under legendary coach Bo Schembechler.

Greg Schiano, who's had head coaching gigs with Rutgers and the Tampa Bay Bucs, is the only other candidate we list at single-digit odds.

Get exclusive info and picks from "The Quants," the Line of the Day, and all the latest bettor information delivered straight to your inbox every weekday.

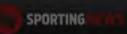




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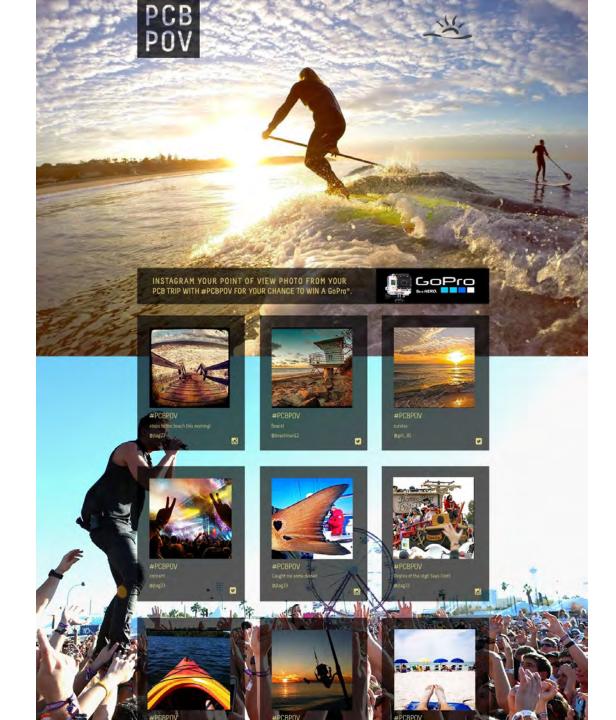




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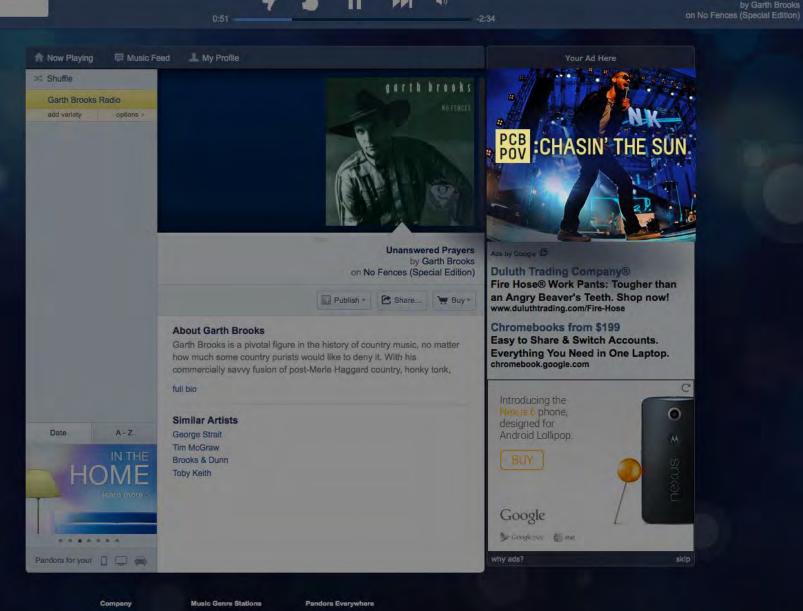
### Bucket List



Photos and Videos

### PANDORA

**Unanswered Prayers** 

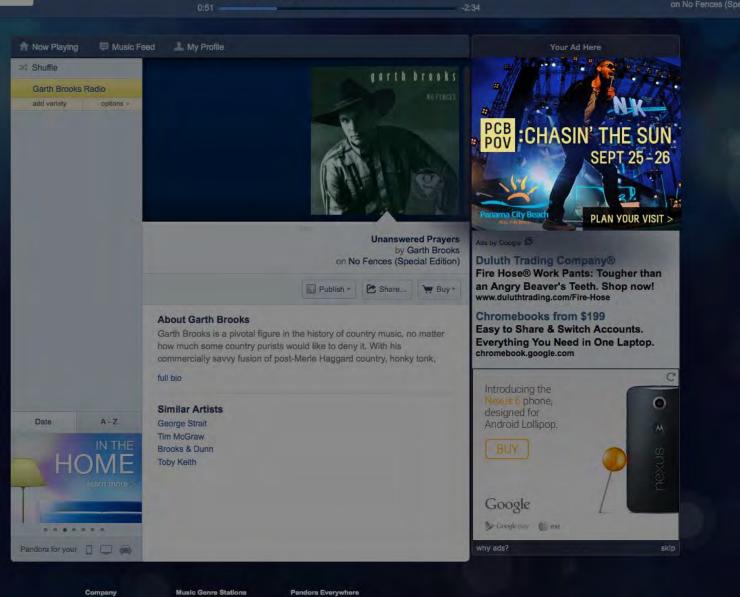


Today's Country Today's Cauntry Today's Hip Hop And Pop Hits Today's R&B And Hip Hop Hits

### PANDORA

**Unanswered Prayers** 

by Garth Brooks



Today's Country Today's Cauntry Today's Hip Hop And Pop Hits Today's R&B And Hip Hop Hits



## **PR: Press Releases**

### 24 Press Releases with Topics Including:

- -15 Big Events in 2015
- -Winter Packages: Snowbirds Offerings
- -Family Friendly Mardi Gras
- -Participant Sports Travel and Outdoor Pursuits
- -Panama City Beach Air Service Overview: What's New in 2015
- -Spring Travel
- -What's New for the Summer Season
- -Gulf Coast Jam Preview with Travel Packages
- -Chasin' the Sun Music Festival
- -Pirates of the High Seas Festival
- -Local Food Finds Highlights
- -Beach Ball Drop and New Year's Eve (Long Leads)
- -Multi-Generational Travel Offerings: Advantages to a Condo Vacation
- -Panama City Beach Undiscovered



### PANAMA CITY BEACH ANNOUNCES 15 FUN-FILLED EVENTS IN 2015

Panama City Beach, FL., Dec. 2, 2014 – Long known for its emerald-green waters and sugar white sand shores, Panama City Beach continues to thrive as a REAL.FUN.BEACH and has become the ultimate coastal playground for its array of year-round events and Southern hospitality. There are more fun-filled events for all ages in 2015 than ever before as the destination will once again host another exciting lineup of concerts, festivals and plenty of Florida sunshine.

"In Panama City Beach, we pride ourselves in having fun and 2014 has been a record-breaking year with more visitors enjoying our beautiful beaches than ever before," shares Dan Rowe, president and CEO of the Panama City Beach Convention & Visitors Bureau. "With more events lined up in 2015 as well as new flights arriving into Northwest Florida Beaches International Airport this spring, we invite everyone to pack their favorite pair of flip flops and join us at our Real-Fun.Beach."

Below is an overview of 15 events being held in Panama City Beach in 2015 worth a visit:

### Winter Resident Senior Prom, Feb. 10, 2015

Now in its fourth installation, the Senior Prom is a fun tradition for winter residents to get out their dancing shoes. Heid at Edgewater Beach & Golf Resort, the 2015 theme is "Under the Starry Skies" and for more information, visit www.visitgemamatitybeach.com.

### Panama City Beach Mardi Gras & Music Festival, Feb. 13-15, 2015

The three-day festival and parade takes place in and around Pier Park and is one of the most fun Mardi Gras events anywhere. The event is perfect for the whole family and includes a Mardi Gras Kidz Zone, float tours, Fat Tuesday Street Fair and live musical performances by Zydeoc Zoo and Dr. John & the Nite Trippers. For more information, wist www.visitenamachybeach.com.

### Seabreeze Jazz Festival, April 22-26, 2015

Named "Top 10 Jazz Festival in the USA" by JazzIZ Magazine and recently nominated as "Best Jazz Festival" at the Oasis Smooth Jazz Awards, the Seabreze Jazz Festival combines the top national smooth jazz artists with a full weekend of fun, sun, great beaches, and good times - al on the west end of Panama City Beach. The event now attracts over 20,000 fans from the USA, Canada, and Europe for the ultimate performance-packed weekend of jazz. For more information, visk www.seabrezejazzlestival.com.

### There's Music in the Air in Panama City Beach (Summer 2015)

Throughout the summer, visitors and locals gather for the free summer concert series at Aaron Bessant Park amphitheater, where live performances in the open-air amphitheater set the tone for summer. The PCB summer Concert Series takes place every Thursday night, and Groovin' on the Green offers a scaled down version of the open-air concert series on Monday nights at the Carillon Beach Resort.



## **PR: Target Market Pitches**

### Regions of Focus:

- Texas
- Alabama
- Georgia
- Tennessee
- New York
- Illinois
- Tennessee
- Missouri
- Kentucky
- Mississippi
- Florida
- Ontario

Audience/Market Targets: Young Families, National

Builds brand awareness, drives website traffic, increases Facebook likes, increases consumer engagement levels

2-month promotion running Feb/March time period

Photo sharing sweepstakes to win a weeklong Spring vacation at PCB for 5 years

Lives on website landing page and on Facebook page

Brand partnerships: Lily Pulitzer, Coppertone suntan lotion & CVB Corporate Sponsors

Media partnerships: Travel Channel & TripAdvisor





e-database and builds consumer

## **PR:** Partnerships

Oreos: Pirates of the High Seas Festival Play-Doh GoPro: Chasin' the Sun Underwater Movie Festival Skittles: "Put Your Beach Face On" Yeti Coolers: Summer for Beach Lovers Costa Del Mar Sunglasses













## **PR: Media Missions**

Markets for Appointments:

- Dallas and Houston February
- St. Louis and Nashville April
- New York May
- Washington and Baltimore May
- Atlanta, Birmingham and Montgomery August
- Orlando









## **PR:** Press Trips

- Mardi Gras Group Trip
- Seabreeze Jazz Festival
- Chasin' the Sun Blogger Trip
- Pirates of the High Seas Family Trip
- Individual Visits







## **PR: Broadcast**

- Live Segments and Interviews
- Giveaways and Promotions
- Events

















### IMPORTANCE

In FY 2015, we will focus our sales activities in maintaining our presence within the consumer and group travel segments, developing a robust reunion program, and increasing partner engagement in group sales and other sales initiatives. Emphasis will be placed on the evolution of our product, natural surroundings, accessibility, value, and new offerings that enhance the visitor experience.

## APPROACH

We will accomplish these goals through consumer shows, tour and travel marketplaces, cooperative opportunities with VISIT FLORIDA, the destination marketing organizations in Northwest Florida and potential co-ops with our accommodation partners. These shows include:

**Consumer Shows** – Travel shows in key domestic drive & fly markets are an important vehicle to increase awareness of Panama City Beach as a tourist destination within our target audiences with a propensity to travel. The shows we will exhibit include:

- Southern Women's Shows Birmingham, Nashville and Memphis are four-day consumer shows geared to women with an estimated attendance of 30,000 per show
- New York Times Travel Show & Boston Globe Travel Show allows the TDC to target NE travelers as well as New York/Boston-based national travel media
- ITT Military Shows provide an opportunity to reach veterans across the Southeast US as they plan and coordinate individual travel and military reunions
- AAA Ohio provides an opportunity for the TDC to reach AAA members in the Ohio market



## Sales Overview – (cont)

### APPROACH

**Domestic Group/Travel Tradeshows** – Group travel shows remain a viable way to reach domestic tour operators and other group travel organizers that have the potential to generate visitation to Panama City Beach.

- American Bus Association (ABA) is a tour and travel marketplace
- VISIT FLORIDA Trade Events provide an opportunity to network with tour operators and travel agents in target markets

## TACTICS

- Continue promote the message that Panama City Beach has "something for everyone."
- Encourage increased partners participation is CVB Programs.
- Continue to educate partners on the value of participating in sales program through industry workshops.
- Leverage additional exposure for Panama City Beach through cooperative sales opportunities and missions with VISIT FLORIDA.
- Engage Northwest Florida TDC partners to collaborate as a region for increased exposure in emerging markets.
- Optimize budget to ensure that target markets are enhanced and new markets are addressed on regional, national and international levels.
- Update collateral materials, trade shows booths, etc.
- Secure compelling photography that effectively communicates the Panama City Beach experience to sales clients.
- Enhance the group visitor experience step-on guided tours, group welcomes, etc.



## Sales Department Trade Show Calendar

OCTOBER 2014	DATES
Southern Women's Show - Birmingham	2 - 5
NOVEMBER 2014	DATES
World Travel Market	3 - 6
Visit Florida Trade Event - Atlanta	20
AAA of the Carolinas	21 - 22
JANUARY 2015	DATES
American Bus Association (ABA)	10 - 13
Florida Huddle	14 - 16
AAA Great Vacations Expo	16 - 18
New York Times Travel Show	23 -25
FEBRUARY 2015	DATES
RSAA Summit	3 - 4
Boston Globe Travel Show	6 - 8

MARCH 2015	DATES
ITB	4 - 8
Southern Women's Show - Memphis	13 - 15
ITT Military Shows Alabama/Georgia	17 - 20
APRIL 2015	DATES
Southern Women's Show - Nashville	30 – May 3
MAY 2015	DATES
IPW	30 – June 3



## International Overview



## **International Overview**

## IMPORTANCE

Our International Program is a joint initiative of our Marketing and Sales teams. Developing business relationships within the international travel-trade and media is critical to expand international visitation to Panama City Beach. Through partnership opportunities with VISIT FLORIDA, Brand USA, and through our international representation firms, Lieb Management (Germany) and Gosh PR Gosh (UK), emphasis in FY 2015 will be placed in developing these relationships with European "travel influencers." In addition, we will conduct educational seminars and workshops with accommodation partners in order to increase awareness and participation in this emerging market segment.

Delta Airlines now owns 49% of Virgin Atlantic Airlines and Virgin Holidays. Beginning in October, 2014 Virgin Atlantic will begin non-stop service into Atlanta. They have a stated goal of pushing passengers further into the Delta's domestic network. This change is creating additional opportunities for PCB to capture additional UK business. In addition, this change will significantly ease the restrictions on fly/drive passengers that arrive in Orlando, drive to PCB and fly home from ECP connecting through Atlanta.

International travel from the UK and Germany is an emerging market with opportunities in spring/fall shoulder seasons. Canadians are an important aspect of our winter resident business.



#### **APPROACH**

**International Tradeshows** – International tradeshows, in partnership with VISIT FLORIDA, provide an excellent platform to increase awareness of Panama City Beach to tour operators and travel media from key countries across the globe.

**Partnership with Tour Operators** – Through our efforts to date, we have connected lodging properties with a number of tour operators in the UK and Germany. We will continue to develop and strengthen these relationships. In FY 2015, we will focus particular emphasis on Virgin Holidays, as well as Florida-based receptive tour operators.

**International Tour Operator FAM Trips/Media Visits** – The old adage "seeing is believing" applies to the international market. As we look to build international awareness of Panama City Beach as a tourist destination, hosting tour operators and travel media is essential. Their first-hand experiences and recommendations are important as they educate their constituents on a "new" Florida destination.

**Direct to Consumer Communications** – To increase demand among international audiences, we are partnering with Visit Florida and Brand USA on cooperative marketing campaigns in Canada, UK and Germany, as well as launching a German language brochure and website – VisitPanamaCityBeach.de.



**Northwest Florida Tourism Council Cooperative Efforts** – A number of other Northwest Florida communities have expressed interest in collaborating on a targeted international campaign to extend the reach of our collective efforts.

### International Overview – (cont)

### TACTICS

**International Tradeshows** – International tradeshows, in partnership with VISIT FLORIDA, provide an excellent platform to increase awareness of Panama City Beach to tour operators and travel media from key countries across the globe. These shows include:

- Florida Huddle is an international marketplace for tour operators and media
- World Travel Market (WTM) is an annual four-day travel event that brings together close to 50,000 worldwide travel industry professionals for appointments, (suppliers and buyers) networking, etc.
- **ITB** is the world's largest travel and tourism tradeshow in Berlin that will further extend our ability to begin attracting international wholesale and FIT travel
- **IPW** is the Travel Industry Association of America's annual international tour operator and media event promoting travel to the United States
- RSAA is a travel tradeshow focusing on US-based receptive tour operators who provide the on the ground management for internationally-based tour operators.

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## Special Events Strategy



### **Special Events Overview**

#### IMPORTANCE

Special Events continue to be a focus area to help increase visitation to Panama City Beach throughout the year, with particular emphasis during the spring and fall. Research has shown that our visitors will increase the frequency of their visits if they are given a compelling reason to do so. Outside of the peak summer travel season, festivals and special events are a critical component to spur this type of travel.

Additionally, fun, unique and well-orchestrated festivals and special events can have a halo effect for destinations and create intangible benefits by spurring interest in the destination even if the potential visitor is unable to attend a specific event. The TDC routinely promotes several high-profile events on an on-going basis throughout the year to demonstrate the dynamic, fun nature of Panama City Beach. These events include: The Beach Ball Drop, Seabreeze Jazz Festival, Thunder Beach, Gulf Coast Jam and the Pirates of the High Seas Fest.

We will continue to foster relationships with organizations throughout the destination to create and assist with special events that have the potential to drive incremental demand for Panama City Beach as a tourist destination. Potential partners include: Grand Lagoon Coalition, Panama City Beach Chamber of Commerce, Beach Arts Alliance and Bay County Chamber of Commerce.

The Beach Ball Drop has significant importance to the TDC. Not only did the inspiration for the Beach Ball Drop occur with the TDC staff, the TDC utilizes this event to reinforce the Real.Fun.Beach. brand throughout the year. As a sponsor, the TDC works with Pier Park to improve and grow the event each year. However, additional investments in the infrastructure are needed to enhance the event further. The TDC board of directors has authorized staff to work with Simon Properties, the Pier Park CDD and the City of Panama City Beach on a permanent method to "drop" the beach ball, in lieu of the current method, which is by crane.



### APPROACH

The TDC will collaborate with outside organizations on festivals, concerts and special events that take place throughout the year. This collaboration includes: sponsorships, and in-kind or paid advertising support. Additionally, the TDC will continue to develop, manage, host and publicize signature events designed to increase visitation to the destination.

All the events supported by the TDC must strengthen, extend, and leverage the brand of Real.Fun.Beach.

- We will maintain our relationships with existing events, as well as, work together to enhance the events through available resources including sponsorship, advertising/marketing or event management.
- Engage the industry partners, through workshops, on events that will incremental demand for the destination.
- We will use innovative event themes appeal to support and extend the Real.Fun.Beach brand and create additional awareness and demand for Panama City Beach.
- Conduct surveys of signature events to determine the economic impact of those events on Panama City Beach's economy.
- Develop and manage budgets for each event to ensure the TDC is able to effectively and efficiently execute a quality events within established budget parameters.



### Special Events Overview – (cont)

- Attend Industry tradeshows and conferences to reach industry decision leaders; attend educational event seminars; and showcase the destination's venue to potential relationships.
  - Florida Festivals & Events Association
  - Pollstar Live
  - International Music Festival Conference
- Foster relationships with national artist agencies such as WME, Live Nation, AEG Live, etc and to explore opportunities with each to produce new events.



## Visitor Services Overview

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### **Visitor Services Overview**

#### **IMPORTANCE**

The Visitor Services staff serve an important role for visitors who are comparing vacation destinations, as well as those visitors who have made the decision to come to Panama City Beach, but desire additional information to enhance their vacation. We will implement strategies to help potential visitors to choose Panama City Beach over competitive destinations, and encourage current visitors to do more, stay longer, and visit more frequently, while reinforcing our brand of REAL.FUN.BEACH.

#### **APPROACH**

Taking advantage to the updated and enhanced Visitor Center space, the Visitor Services staff will focus on providing attentive, personalized service by meeting and greeting visitors as they enter the center and walking them to the brochure displays of interest. The staff will also encourage visitors to utilize CVB resources – visitors guide, mobile websites, etc. – as the preferred source of information throughout their stay in Panama City Beach. The style of service will cultivate, support and celebrate a visitor centric ethic that supports quality visitor experiences through unpretentious, but attentive customer service.



- Maintain and enhance standards of excellence in answering visitors' questions about the destination, whether by phone, through live-chat, at the airport, in the visitor center or an off-site location.
- Actively interact with guests to the Visitor Information Center and encourage guests to use the TDC's mobile website as their primary, trusted information source while visiting Panama City Beach.

### Visitor Services Overview – (cont)

- During select times of peak visitation, or as needed to support group sales, sports marketing or special event initiatives, provide off-site visitor information services to extend the reach of the visitor center and contribute to the sense that Panama City Beach is a safe and welcoming destination.
- Provide Live-Chat support for potential visitors that are seeking information on the TDC's website, visitpanamacitybeach.com.
- Quickly, efficiently and accurately handle fulfillment of Visitor Guide requests coming into the Visitor Services staff through Live-Chat or by telephone.
- Continue Panama City Beach Days in the Official Visit Florida Welcome Centers.
- Rotate free-standing kiosk displays in Visitor Center to highlight events, eco-tourism, and other unique and memorable aspects of Panama City Beach.
- Organize the TDC's National Tourism Day events.
- Raise visibility within the community by having a presence at community events.
- Conduct themed events/activities to highlight upcoming events/seasons.



# Sports Marketing Strategy

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### **Sports Marketing Overview**

#### **IMPORTANCE**

In FY 2015, we will continue to target our key sports markets of softball and baseball, as well as emerging markets in both tournaments (soccer, lacrosse, etc.) and sporting events (½ marathons, adventure races, etc.) that support our goal to be "America's Sports Beach."

Visitors coming to Panama City Beach to participate in or experience a tournament or sporting event are estimated to generate over \$100,000,000 in direct visitor spending with a total economic impact in excess of \$170,000,000.

Additionally, as outlined in the Strategic Plan, we will make concerted efforts to expand the facilities available to host sports tournaments and other sporting events.

#### **APPROACH**

Attracting, fostering and growing tournaments and sporting events requires a multifaceted approach that includes acting as a liaison and partnering the events right holders with the local partners that can help bring the event to fruition. These partners include local governments for the use of athletic facilities, accommodations and others.

Additionally, financial assistance in terms of sponsorships, bid fees, and host fees may be required to secure the events. By securing the events in Panama City Beach, local businesses, as well as local governmental partners benefit by having increased revenues from out of town visitors attending the events.



#### APPROACH

Hosting events alone is not enough. TDC will continue to explore ways to enhance the experience at our major events. We will look at all avenues to increase community participation to encompass the entire length of the beach, as well as work with the Northwest Florida Partnership with Pensacola and Tallahassee to enhance regional and national opportunities.

The TDC understands the standards required to host tournaments that will generate visitation and promote tourism may be higher than what is required for local play. The TDC remains committed to continuing to collaborate with local governments in making necessary enhancements to the public venues to ensure they are maintained in a tournament-ready condition.

- Attend tradeshows and conferences, including:
  - NSA NASC & USSSA National Conventions, TEAMS Sports Conference, Florida Sports Foundation Annual Seminar, NFCA Conference, SPORTS – The Relationship Conference, Sports Link and Connect
- Provide financial assistance in terms of sponsorships, bid fees and host fees:
  - Sponsorships paid to the event right holders: NSA Convention Outing/Booth, USSSA Convention Social/Booth, Gulf Coast Collegiate Classics, World Softball League, Arnold High Basketball Classic, NASC/TEAMS Conference, Gymnastics -Diamond Cheer, Edgewater Classics, Golf - NCCSA, Road Races - Girls Inc., 9/11 Stairclimb, Halifax All-Star Basketball Tournament



### Sports Marketing Overview – (cont)

- Provide financial assistance in terms of sponsorships, bid fees and host fees (cont):
  - Bid Fees paid to the event right holders: baseball Grand Slam World Series and USSSA; softball – NSA Worlds, USSSA Military Worlds, USFA, USSSA NIT and WSL; EVP Volleyball/Motocross; Endless Summer Soccer Tournament; Ironman; Biggest Loser Run/Walk ½ Marathon
  - Host Fees paid to local public athletic venues, including Frank Brown Park and Harder's Park to offset the costs of hosting the events: FL/AL High School Fastpitch Challenge, GCSC Fastpitch Classic, USSSA Military Worlds, NSA Fall World Series, USSSA Softball on the Beach, AAU Regional Basketball, USFA, 3v3 Live Soccer Regionals, Endless Summer Soccer Tournament, WSL
- Conduct workshops to facilitate communication between current and potential events right holders with local tourism industry businesses.
- Collaborate with local sports organizations and others on the development of new tournaments and events to drive incremental visitation.
- Provide microsites for key tournaments to that will provide additional information for participants.



### Sports Marketing Trade Show Calendar

OCTOBER 2014	DATES
Sports Relationship Conference	5 - 8
NOVEMBER 2014	DATES
NSA National Convention	3 - 6
TEAMS Sports Conference	10 - 13
Athletic Business Conference	13 - 15
USSSA National Convention	17 - 21
DECEMBER 2014	DATES
US Sports Conference	8 - 10
APRIL 2015	DATES
NASC Symposium	27 - 30
MAY 2015	DATES
Florida Sports Foundation Annual Meeting	12 - 15
AUGUST 2015	DATES
Connect Sports Marketplace	27 - 29



### Partner Engagement Strategy

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### IMPORTANCE

Panama City Beach is a large beach destination generating in excess of \$1.9 billion in economic impact (direct, indirect and induced), with over 16,500 overnight accommodations available to visitors and over a thousand small businesses serving our visitors. These independent, small businesses are the lifeblood of the Panama City Beach experience. To effectively tell the Panama City Beach story, in order to have potential visitor select Panama City Beach over all other destinations, the TDC needs to engage and partner with these businesses. We need to know their story. The tapestry of these businesses is one of the differentiating factors that make Panama City Beach special.

In addition, many of these businesses have limited advertising budgets to market themselves. Through a robust cooperative marketing program, the TDC will provide affordable opportunities to Panama City Beach tourist businesses to advertise and promote the goods and services they offer.

In addition to cooperative marketing, getting more partners involved with the TDC will assist in extending our brand and bringing Real.Fun.Beach. to life. We also gain a better understanding of the needs of our partners and will assist us in planning for future events, campaigns and marketing activities.



### APPROACH

To engage our partners, the TDC must create value and clearly demonstrate the importance of their participation in our programs - to answer the question, "what's in it for me?"

To this end, we are revamping our approach to cooperative marketing. The TDC will begin publishing the Visitors Guide in January, 2015. This enhanced publication will be produced on a quarterly basis in order to provide up-to-date and relevant content to visitors as they are make their travel planning decisions and allow our partners to adjust their marketing messages by season. The TDC will begin offering co-op marketing opportunities on an ongoing basis throughout the year to help our partners leverage their advertising budgets and take advantage of opportunities as they arise.

The co-op marketing programs will be sold in-house by the TDC's Partner Engagement Director. Bringing the function of selling these programs in-house will necessitate enhanced dialogue between staff and our industry partners. However, the Partner Engagement function is not solely a advertising sales function. Many of the services the TDC offers have no cost associated with them.

One of the most important aspect of partner engagement is listening to the needs of our partners, and that role extends to all members of the TDC staff. As we go forward, it is important for all the management team to reach out and interface with our partners in order for the industry to fully appreciate all that the TDC does in marketing Panama City Beach as a tourist destination. This outreach activity takes on many forms, including one-on-one, sending out industry newsletters and updates, hosting workshops and seminars, and participating in community activities.



### Tourism Development Strategy

### **Tourism Development Overview**

### **IMPORTANCE**

The Tourism Development Department is strategically focused on leveraging Panama City Beach's existing assets and seeking new sources of funding for its programs.

In 2015, we will aggressively pursue corporate sponsorships, grants and other external funding to assist the TDC in creating new tourism opportunities and sustaining existing festivals, events and other tourism assets.

- **Sponsorship:** Panama City Beach's popularity as a vacation destination and its positive image offer opportunities to leverage financial resources by partnering with synergistic corporate brands. We will position *Visit Panama City Beach* as an investment vehicle for companies to reach millions of visitors and, by doing so, increase awareness and sales. Aligning our brand with America's top corporate brands will also elevate the reputation of Panama City Beach among visitors and the community at large.
- **RESTORE Act:** Settlement of claims arising from the 2010 BP oil spill offer a unique opportunity to fund tourism-related infrastructure improvements. In the first funding cycle, Bay County will receive approximately \$6 million to enhance economic development, job creation, the environment and public infrastructure. The final settlement could result in up to \$120 million in available local funds. During each funding cycle, we will actively seek a portion of these monies to expand/improve facilities that will generate incremental visitation.



### **Tourism Development Overview**

Panama City Beach

### The CVB will aggressively seek corporate sponsorships by targeting: **APPROACH** • National companies that offer products/services which are either specific to the coastal vacation lifestyle or have universal appeal; · National marketing agencies and production companies that work with corporations to develop promotional campaigns and special events; • Bay County-based companies that have high visibility and offer products/services targeted to visitors or see value in aligning themselves with Panama City Beach as a way to build community awareness, foster goodwill or underwrite local-oriented events; and, • Private businesses interested in forming partnership alliances that add value to the sponsorship proposition. The CVB will actively seek new sources of revenue to supplement programs traditionally funded through the Tourist Development Tax by: Monitoring developments in the BP Deepwater Horizon settlement and presenting a compelling case for tourism-related projects to receive RESTORE Act funds; Sourcing and applying for grants offered by governmental agencies, private corporations, foundations or other entities interested in promoting tourism; and, Identifying potential opportunities to monetize existing CVB assets (website, venues).

- Utilize AdData EXPRESS advertising database to identify brand-specific decision makers at corporations and agencies.
- Attend IEG Sponsorship Conference (Chicago, IL) to network with sponsors, properties, agencies and industry suppliers; learn new and emerging practices in the sponsorship arena; and, gain insights into sponsorship analytics.
- Attend International Music Festival Conference (Austin, TX) to network with stakeholders in the festival industry; explore potential sponsorship opportunities; and, learn the latest trends, challenges and solutions in this growing market segment.
- Subscribe to resources available through www.sponsorship.com (webinars, research reports) to stay abreast of industry trends and best practices.
- Utilize existing high-profile events in Panama City Beach to host prospective sponsors and demonstrate the destination's infrastructure and drawing power.
- Leverage relationships with existing rights holders to develop co-op sponsorship programs.
- Identify cross-promotional opportunities involving multiple sponsors; facilitate joint activations to maximize their combined investments.
- Research and identify agencies that specialize in sponsorship valuation and sales representation; evaluate risks/rewards of agency representation and, if warranted, select an Agency of Record to facilitate the sponsorship sales process.



# Seasonal Strategy Winter

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### IMPORTANCE

Historically, Winter sees the greatest fluctuations in year to year performance. The uncertain economic climate and marginal weather have been contributing factors to the annual variations.

The Winter Season accounts for 8% of annual revenue. Even though revenue created over this 90day period is about on par with April, the revenues generated during the Winter Season along the beach help keep businesses open and preserve jobs.

Our winter visitors generally fall into two categories – Families traveling to the beach during the Christmas – New Years holidays (many coming specifically for the Beach Ball Drop) and Winter Residents looking to escape colder weather at home – Upper South, Midwest and Canada.

Seasonal Key Statis	tics			Revenue by Season
	Lodging Revenue	Visitor Spending	Visitor Days	
December	\$7,023,380	\$24,873,268	291,389	Winter 8.0%
January	\$7,232,900	\$28,416,213	327,650	
February	\$10,440,520	\$37,308,165	414,682	
Total	\$24,696,800	\$90,597,646	1,033,720	🖬 Fall 📓 Winter 🔛 Spring 📓 Summer

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### **Seasonal Strategy - Winter**

### **APPROACH**

In the aftermath of the Deepwater Horizon Oil Spill, the TDC developed and implemented a strategy that built on the initial enthusiasm from the Beach Ball Drop, to combat this uncertainty.

The strategy focused on creating fun, memorable experiences for our Winter Residents under the basic premise, "We can't control the weather, but we can ensure that a visit to Panama City Beach is all about FUN!" Word of mouth, social media and public relations were the primary vehicles for spreading the message.

Since implementing this strategy, revenues have increased by 21.8%, in spite of horrendous weather in January and February of this year. In the previous four-year period, revenues on grew by 5.7%.

### TACTICS

In order to continue executing our strategy of making Panama City Beach the destination known for fun and further leveraging the Real.Fun.Beach. Brand, we will:

- Continue to support the Beach Ball Drop through an event sponsorship, as well as execute targeted social media, public relations and digital campaigns.
- Execute targeted social media, public relations and digital campaigns highlighting our Winter Resident Activities and special events.
- Promote winter visitation through consumer shows in the Midwest, Northeast and Canada
- Continue to promote participation in the Bucket List
- Continue to support the Biggest Loser Run/Walk ½ Marathon



### Seasonal Strategy: Winter – (cont)

- Continue to support the Biggest Loser Run/Walk ½ Marathon
- Continue to develop, support and implement components of our Winter Resident program, including:
  - Winter Resident Appreciation Days
  - Homecoming
  - Mystery Golf Challenge
  - Karaoke Idol/Winter Resident Dance-off Competitions
  - Sponsorship of Canada Day and State Days
  - Sponsorship of non-profit cultural events that appeal to Winter Residents
  - Senior Prom
  - Sponsorship of GCSC Winter Residents educational programs
- Host the 2<sup>nd</sup> Annual Mardi Gras and Music Festival.
- Begin publishing the Visitors Guide on a quarterly basis to provide more relevant and topical info to potential visitors as they are planning the vacations.



Seasonal Strategy Spring

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### Seasonal Strategy: Spring

### IMPORTANCE

Spring is second only to summer in its economic importance to Panama City Beach, accounting for approximately 30% of annual revenues. During the Spring season, fluctuations in monthly revenues between the months of March and April clearly demonstrate the importance of family travel over the Easter holiday. In years when Easter occurs in March, March revenues increase while April revenues suffer. When Easter is late and occurs in April, the converse is true.

Signature special events like the Seabreeze Jazz Festival and Thunder Beach, along with the desire of families and college students to head to Panama City Beach after long, cold winter months drive much of the Spring season revenues.

Seasonal Key Statistics			
	Lodging Revenue	Visitor Spending	Visitor Days
March	\$38,269,520	\$150,908,862	1,595,549
April	\$26,108,672	\$80,447,613	875,504
May	\$32,019,078	\$102,058,294	1,097,627
Total	\$96,397,270	\$333,414,770	3,568,680



### Seasonal Strategy: Spring – (cont)

#### **APPROACH**

Panama City Beach enjoys high of top of mind recognition as a Spring destination. The approach the TDC utilizes to market the beach focuses on aggressive public relations strategy, leveraging interest in Spring Break to highlight the beach on a year-round basis. In addition, the will TDC deploy integrated marketing campaigns focusing on family travel to the beach and supporting the signature events that occur in the Spring.

Sports tournaments and sporting events are also important demand drivers in April and May.

- Conduct Media missions to New York and other key cities in the 1<sup>st</sup> Quarter to promote visitation to Panama City Beach during the Spring, Summer and Fall seasons
- Through public relations, social media, print, digital outdoor marketing channels communicate a "Spring Break Responsibly" and "Know Before You Go" that communicates the spring break rule changes that were enacted this.
- Continue to support the Seabreeze Jazz Festival through an event sponsorship, as well as execute targeted social media, public relations and digital campaigns.
- Execute targeted integrated social media, public relations and advertising campaigns highlighting travel to Panama City Beach in the Spring.
- Continue to develop and support tournaments and sporting events throughout the Spring season.
- Attend Consumer trade shows to promote visitation to Panama City Beach during the Spring, Summer and Fall seasons.
- Continue publishing the Visitors Guide on a quarterly basis to provide more relevant and topical info to potential visitors as they are planning the vacations.



Seasonal Strategy Summer

### Seasonal Strategy: Summer

#### **IMPORTANCE**

The 92 days of Summer constitutes nearly 50% of revenue generated by Panama City Beach.

Seasonal Key Statistics			
	Lodging Revenue	Visitor Spending	Visitor Days
June	\$63,435,012	\$213,986,689	1,985,329
July	\$69,271,596	\$227,560,608	2,106,959
August	\$31,372,152	\$116,997,816	1,155,094
Total	\$164,078,760	\$558,545,114	5,247,382



### APPROACH

Panama City Beach is first and foremost a summer, family beach destination. During June and July, all of our marketing, sales, sports marketing, special events, and visitor services strategies all focus on driving additional interest in Panama City Beach as a family destination. After schools go back for the Fall in early August, we expand our messaging to appeal to families with young children that have not entered school yet and adults traveling without children.

Youth baseball and fastpitch tournaments provide a base of business for June and July, while adult softball is our strongest sports component in August.

- Conduct Media missions to New York and other key cities in the 1<sup>st</sup> Quarter to promote visitation to Panama City Beach during the Spring, Summer and Fall seasons
- Execute targeted social media, public relations, broadcast and digital campaigns highlighting travel to Panama City Beach in the Summer.
- Continue to develop and support tournaments and sporting events throughout the Summer season.
- Attend Consumer trade shows to promote visitation to Panama City Beach during the Spring, Summer and Fall seasons.
- On peak travel days, take the "Visitor Center To Go" to the Florida Welcome Centers on I-10 and US 231 to encourage visitors without lodging reservations to make Panama City Beach their destination of choice.
- Have a Visitor Services presence at the Summer Concert Series to encourage participation in the Bucket List and promote upcoming Special Events.
- Continue publishing the Visitors Guide on a quarterly basis to provide more relevant and topical info to potential visitors as they are planning the vacations.



### Seasonal Strategy Fall

### Seasonal Strategy: Fall

#### **IMPORTANCE**

The TDC Board of Directors believes the Fall season has potential for strong revenue growth and is of critical importance to Panama City Beach. Barring a storm event in the Gulf of Mexico, the Fall season has arguably some of the best weather all year, and yet, the Fall season constitutes 13.5% of annual revenues. Kids going back to school, college football and the upcoming holiday season, all contribute to the difficulty in driving Spring-like revenue totals in the Fall.

#### **APPROACH**

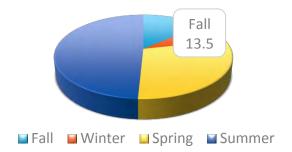
To overcome the obstacles that impede visitation in the Fall, the TDC Board of Directors set the strategic direction of creating, supporting and fostering Special Events throughout the Fall to give visitors a reason (an excuse) to come back to the beach in the Fall. Since implementing this strategy in 2010, revenues for the Fall have increased over 41.2%.

Special events occur almost every weekend during September and October. The Lobster Festival, Thunder Beach, the Seafood Festival and Emerald Coast Cruzin' have been mainstays of the beach. New events that have been added include: Gulf Coast Jam, Chasin' the Sun Music, Pirates of the High Seas Fest, and Chili Vibrations Reggae Festival.

#### **Seasonal Key Statistics**

	Lodging Revenue	Visitor Spending	Visitor Days
September	\$22,463,984	\$73,441,806	686,295
October	\$15,703,677	\$50,683,455	523,826
November	\$7,043,879	\$29,444,059	307,507
Total	\$45,211,540	\$153,569,320	1,517,627

## Revenue by Season



### Seasonal Strategy: Fall – (cont)

- Conduct Media missions to New York and other key cities in the 1<sup>st</sup> Quarter to promote visitation to Panama City Beach during the Spring, Summer and Fall seasons
- Execute targeted social media, public relations, advertising campaigns highlighting travel to Panama City Beach in the Fall.
- Conduct an integrated in-market campaign during the Summer and Fall to encourage return visitation.
- Continue to develop an implement strategies to grow TDC owned and operated events in the Fall – 2<sup>nd</sup> Annual Chasin' the Sun Music Festival, featuring Alan Jackson and the 5<sup>th</sup> Annual Pirates of the High Seas Fest.
- Continue to develop and support tournaments and sporting events throughout the Fall season.
- Attend Consumer trade shows to promote visitation to Panama City Beach during the Spring, Summer and Fall seasons.
- On peak travel days, take the "Visitor Center To Go" to the Florida Welcome Centers on I-10 and US 231 to encourage visitors without lodging reservations to make Panama City Beach their destination of choice.
- Continue to support Fall Events, like Gulf Coast Jam, Seafood Festival, and Emerald Coast Cruzin' through an event sponsorships, as well as executing targeted social media, public relations and digital campaigns.
- Continue to sponsor the Florida Ironman.
- Continue publishing the Visitors Guide on a quarterly basis to provide more relevant and topical info to potential visitors as they are planning the vacations.



