

Panama City Beach, Florida Festival Final Report

Prepared for:

- Panama City Beach Convention and Visitors Bureau



Study Conducted: 2017
Final Report Submitted – August 2017

Young Strategies, Inc.
Charlotte, NC

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Panama City Beach Convention and Visitors Bureau

Purpose

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

Methodology

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

The YSI research team conducted the interviews at the following festivals/events: Mardi Gras, Emerald Coast Boat and Lifestyle Show, Emerald Coast Cruzin', UNwineD, Seabreeze Jazz Festival, Thunder Beach Spring and Jeep Jam. Interviews were conducted in the afternoon and early evening hours.





Mardi Gras

February 24-25, 2017

N=79

Mardi Gras Festival Methodology Detail:

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

Summary of Festival Survey Responses



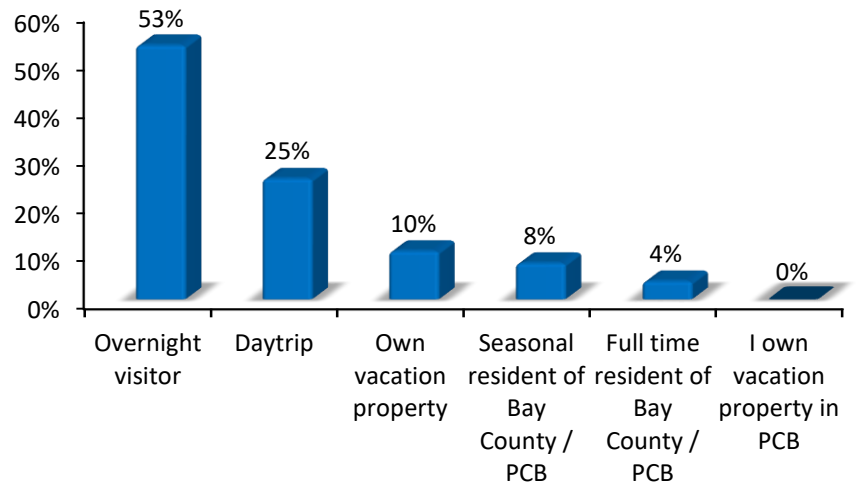
Mardi Gras Jazz Festival Survey Response Summary

- Respondents were an average age of **48.2** with the following generational break down (100% of respondents were adults 18+ years of age):
 - **Baby Boomer (50-67) – 74.2%**
 - **Generation X (29-49) – 17.7%**
 - **Generation Y (18–28) – 0.8%**
 - **Silent Generation (67-89) – 7.3%**
- 63% of respondents were female, and 37% were male.
- **Point-of-origin – Respondents came from 20 states with the largest portion of respondents from Florida (26%), followed by Georgia and then Alabama.**
- Pre-trip planning – **45%** planned to come to the festival the day of, followed by **21% planning 1 week prior to their visit.**
- Average length of stay in PCB = 5.6 nights with 52.5% reporting a lodging expenditure. Length of stay mode was 2.
- 35% traveled to the festival with 2 people traveling in their vehicle followed by 27% with 4 people in their vehicle.
- Average party size attending the festival was 3.8 with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.78.
- Overall rating of Mardi Gras Festival was very high at 4.85.
- Average party spending while in PCB: \$807.95.

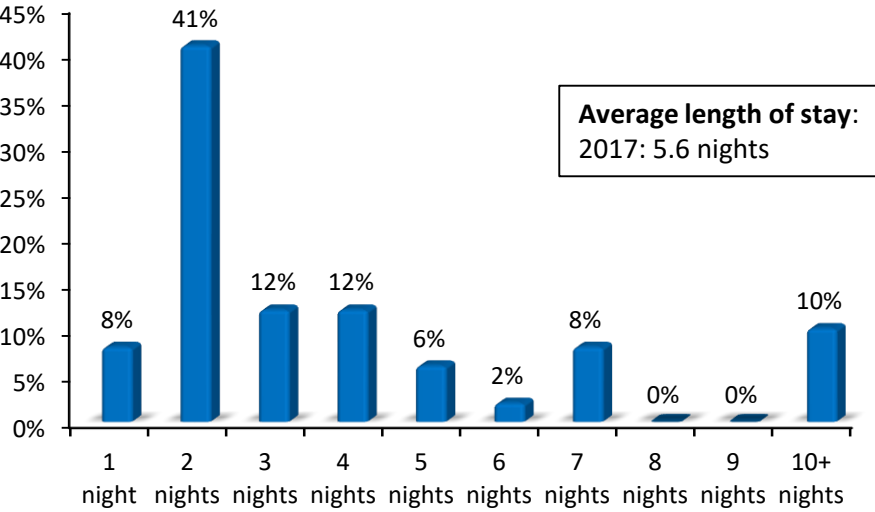
Panama City Beach Convention and Visitors Bureau

Mardi Gras

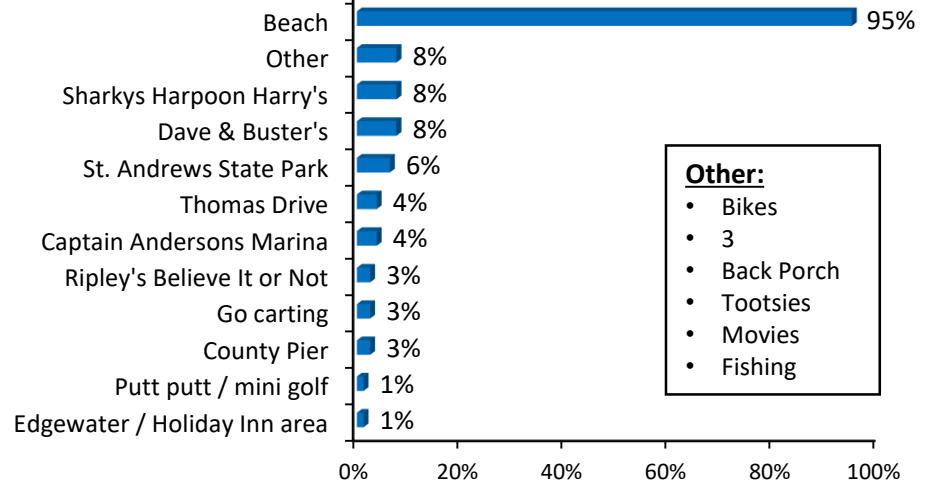
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=79



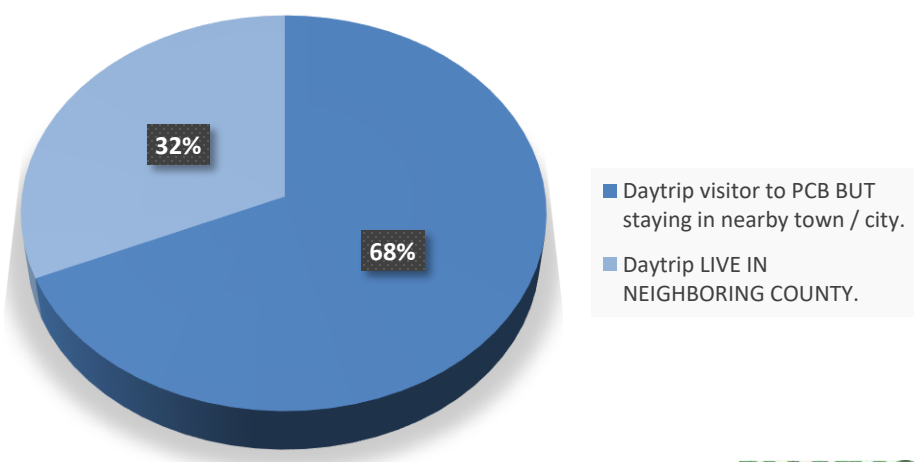
Please specify the number of nights you are staying during this visit to PCB. n=41



What other attractions/areas did you/someone in your group visit on THIS trip to PCB: n=79



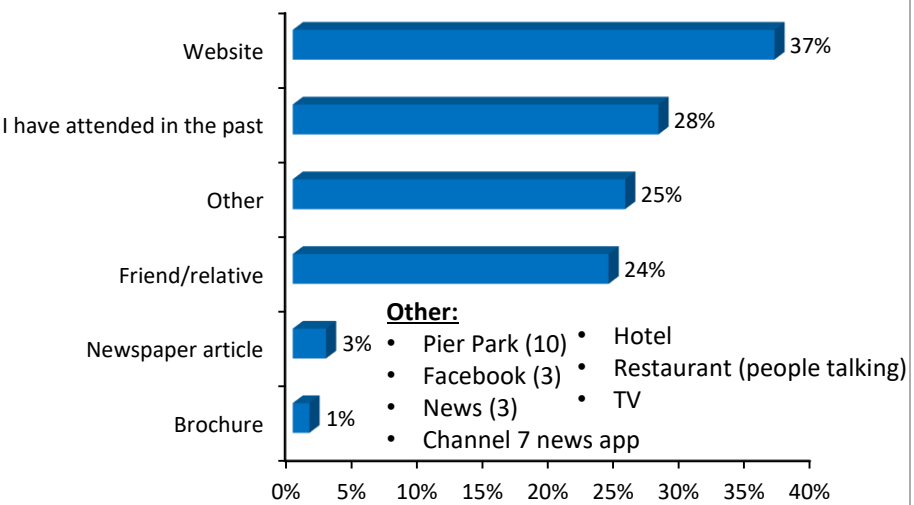
Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=19



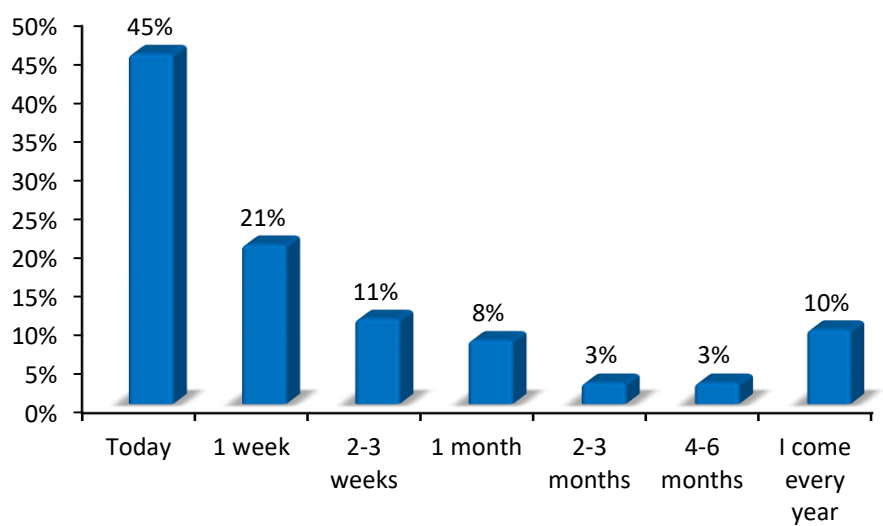
Panama City Beach Convention and Visitors Bureau Mardi Gras

Trip Planning and Purpose

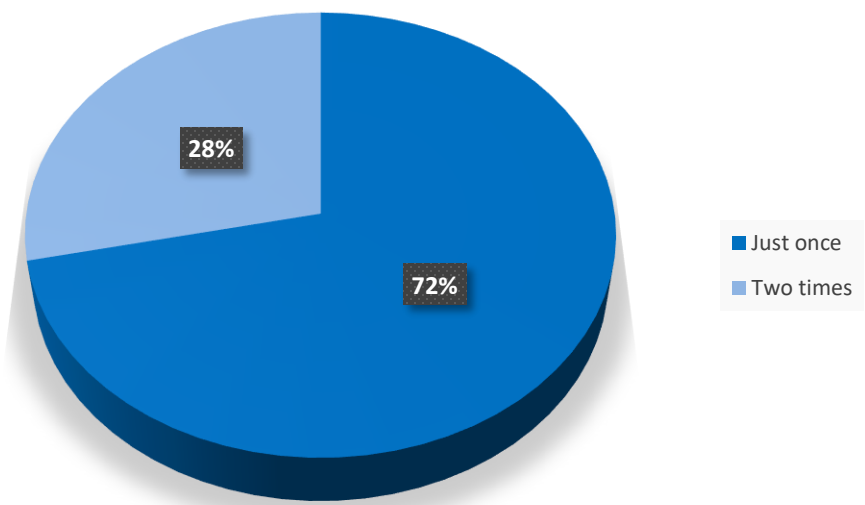
How did you find out about the festival? n=79



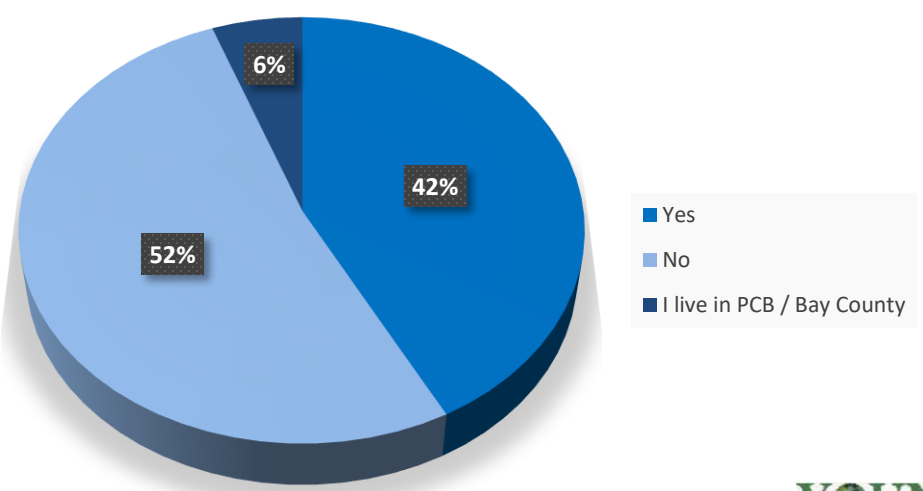
How far in advance did you plan to attend this festival/event? n=73



Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=67



Was attending this festival your primary purpose for visiting Panama City Beach? n=71

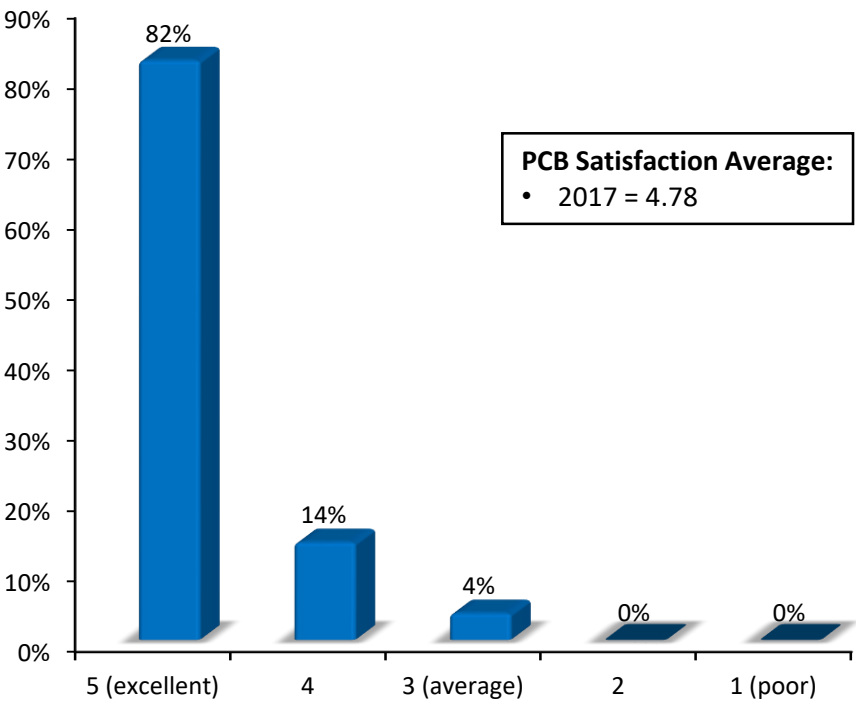


Panama City Beach Convention and Visitors Bureau

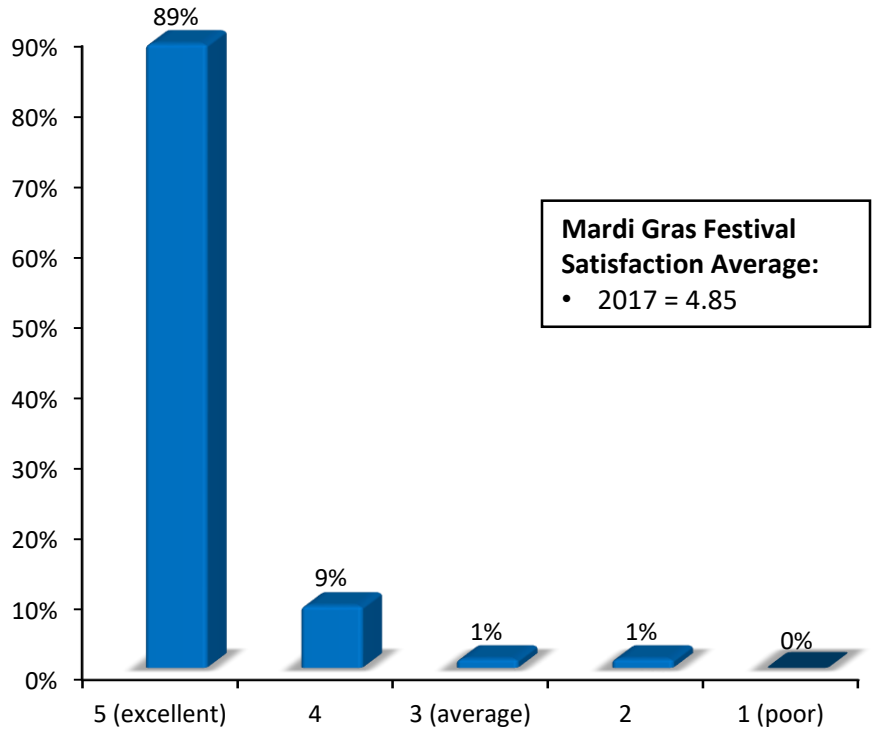
Mardi Gras

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=79



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Mardi Gras Festival? n=79



Observations:

- Overall trip satisfaction to Panama City Beach was high at a 4.78 on a 5-point scale.
- Overall trip satisfaction to the Mardi Gras Festival was very high at a 4.85 on a 5-point scale.

Panama City Beach Convention and Visitors Bureau

Mardi Gras

Travel PARTY Spending (Total Trip)

Spending Category	2017
Lodging (% of reporting)	\$554.29 (35.0%)
Dining/Food (% of reporting)	\$374.53 (53.8%)
Shopping (% of reporting)	\$361.18 (42.5%)
Bars/Nightclubs (% of reporting)	\$30.00 (1.3%)
Local Transportation (% of reporting)	\$64.38 (10.0%)
Tickets/Admissions (% of reporting)	\$250.00 (2.5%)
Average Total Spending Per Travel Party (% of reporting)	\$807.95* (55.0%)
Average total # in Travel Party	3.8
Average Length of Stay	5.6 nights



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

Verbatim Comments:

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

- Blountstown
- Bonifay
- Chiply
- Cottonwood
- Crestview
- Destin
- Dothan (3)
- Marianna
- Niaoilke
- Port St. Joe
- Wee Wa

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

- 1.5 hours away
- Altha
- Arton, AL
- Genova, AL
- St. Joe
- Youngstown

What websites did you use to find out about the festival?

Other:

- Air Bnb
- Facebook (16)
- Google
- PBC Police Department
- Pcb
- Pier Park Events
- TDC Visitors Center (2)
- Tourist Info
- Visit PCB

How can we improve your experience to this festival?

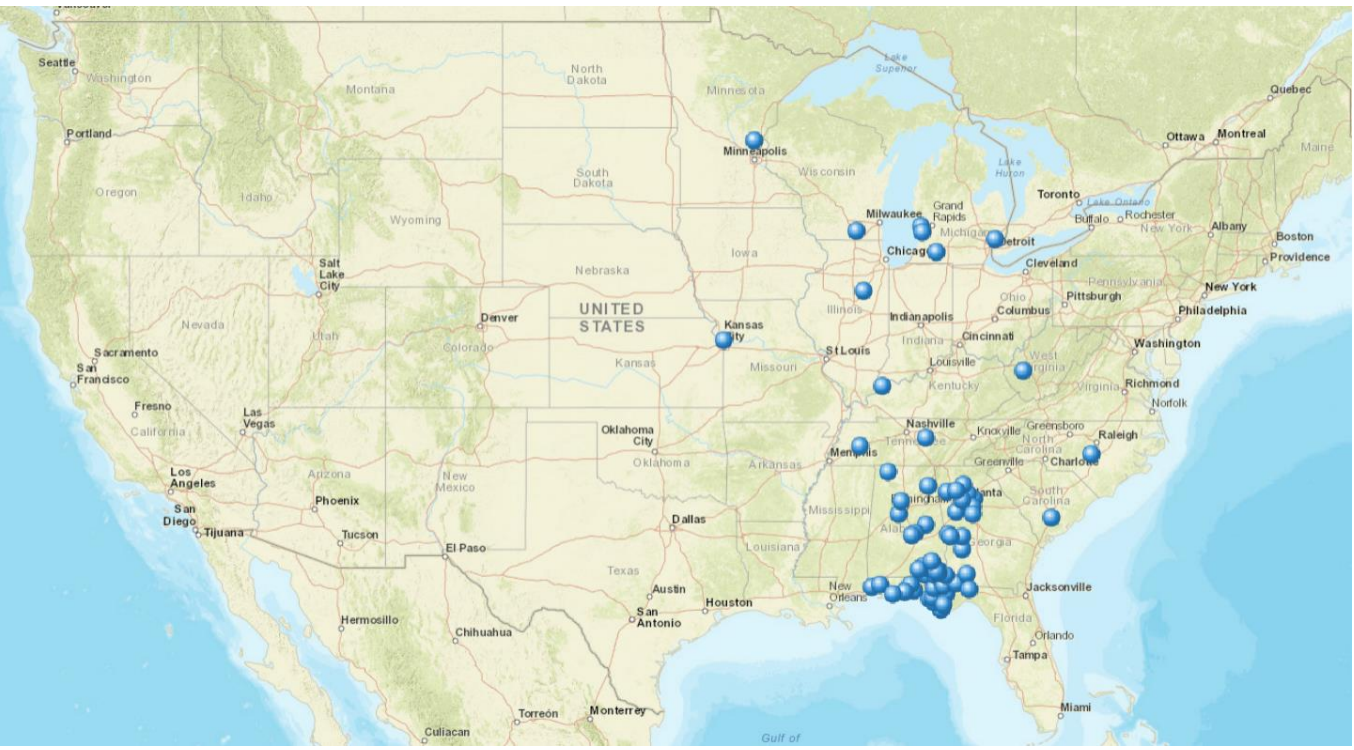
- Awesome
- Confusion on times; facebook needs better info
- Facebook needs to add more details about the event
- It's great
- More food vendors
- More food vendors - cajun food
- More outdoor tables in shade
- More vendors
- Need more vendors and food trucks
- Planning on coming next year
- Shuttle bus

How can we improve your experience to this festival?

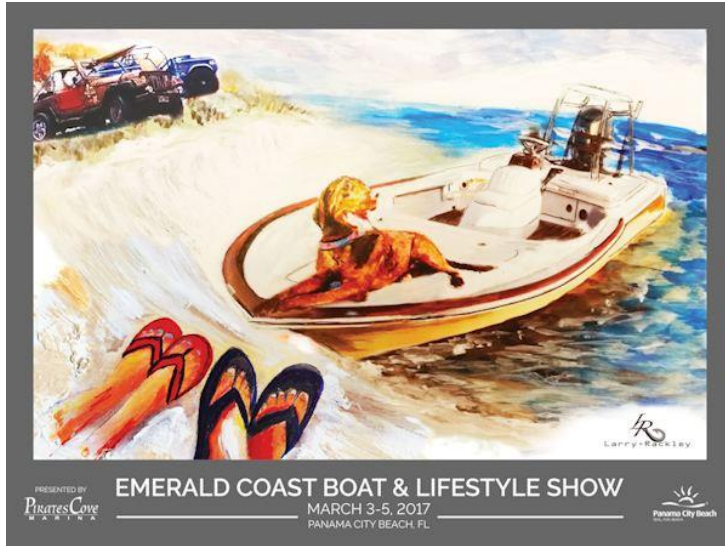
- More golf cart parking
- More parking
- Not enough activities
- Really great event...Don't like mobil mardi gras
- Traffic (3)
- Very dog friendly

Panama City Beach Convention and Visitors Bureau Mardi Gras

2017 Respondent Point of Origin



State - City	



Emerald Coast Boat and Lifestyle Show

March 3-5, 2017

N=120



Emerald Coast Boat and Lifestyle Show Research Methodology

Detail:

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

Summary of Festival Survey Responses

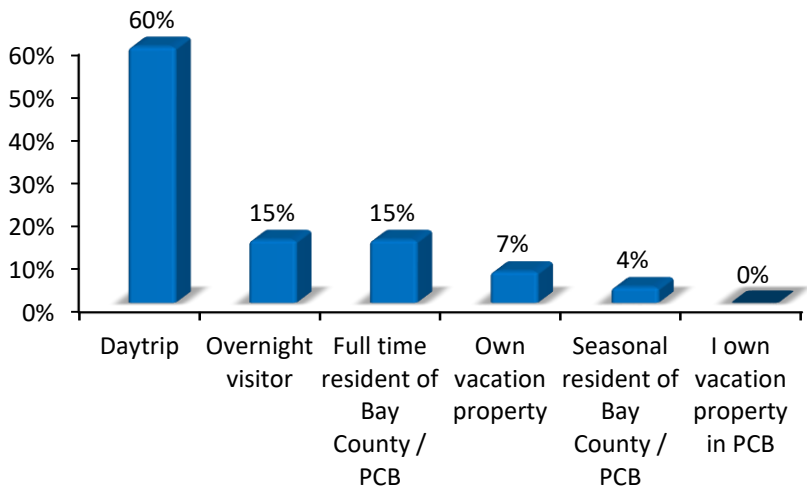


Emerald Coast Boat and Lifestyle Show Survey Response Summary

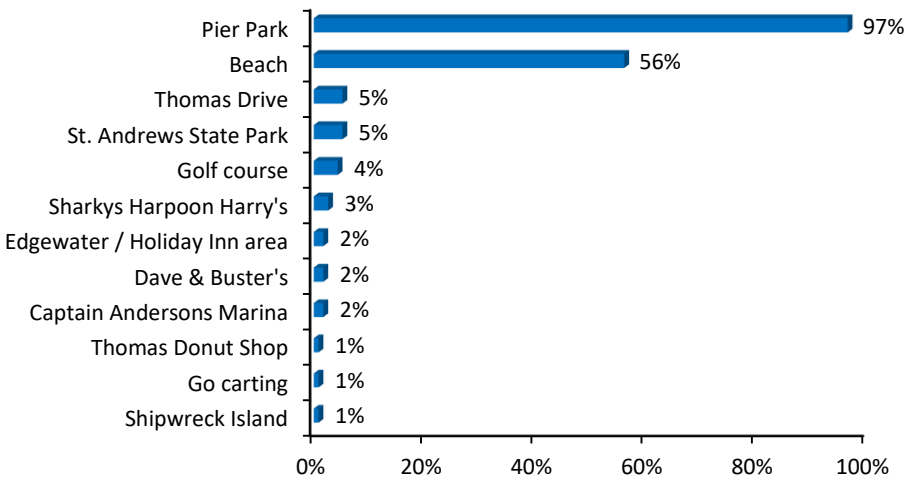
- Respondents were an average age of **52.9** with the following generational break down (100% of respondents were adults 18+ years of age):
 - **Baby Boomer (50-67) – 74.2%**
 - **Generation X (29-49) – 17.7%**
 - **Generation Y (18-28) – 0.8%**
 - **Silent Generation (67-89) – 7.3%**
- 33% of respondents were female, and 67% were male.
- **Point-of-origin – Respondents came from 20 states with the largest portion of respondents from Florida (26%), followed by Georgia and then Alabama.**
- Pre-trip planning – **93% planned on attending festival within 3 weeks of their visit.**
- Average length of stay in PCB = 39.1 nights with 1 being the most frequent response; 13.3% reported a lodging expenditure with only 16 respondents reporting.
- Average party size attending the festival was 3 with 2 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.65, on a 5-point scale.
- Overall rating of Emerald Coast Boat and Lifestyle Show was a 4.47, on a 5-point scale.
- Average party spending while in PCB: \$584.47.

Panama City Beach Convention and Visitors Bureau Emerald Coast Boat and Lifestyle Show

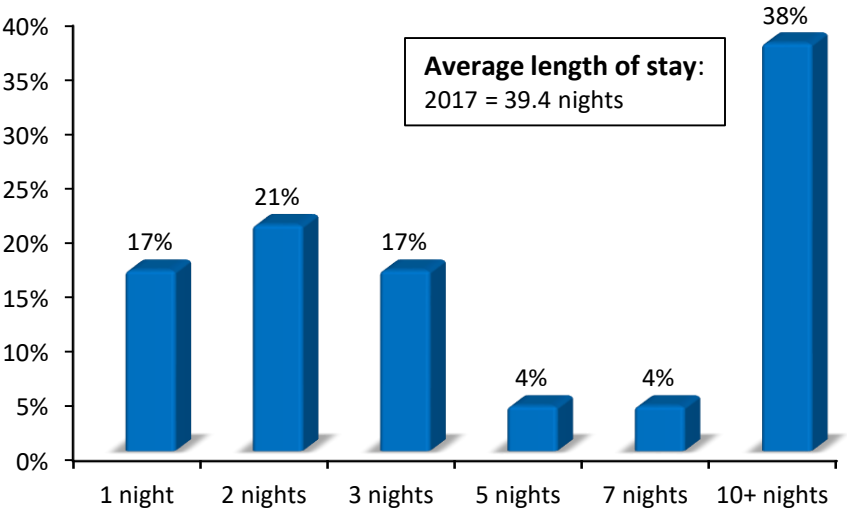
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=109



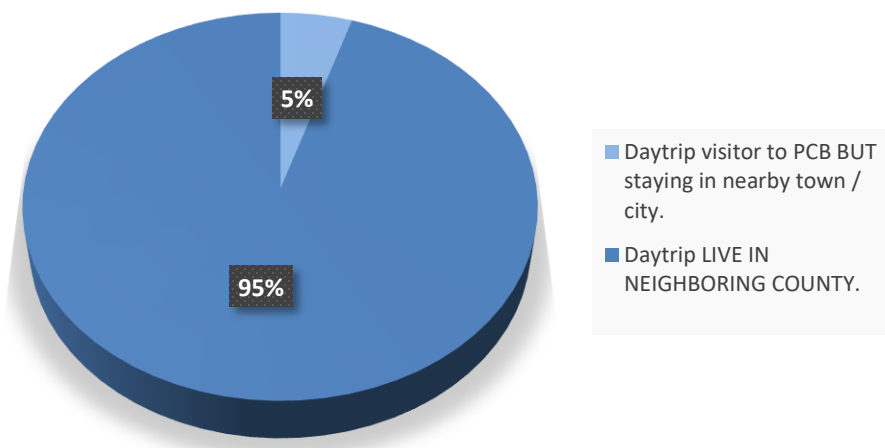
What other attractions/areas did you/someone in your group visit on THIS trip to PCB? n=116



Please specify the number of nights you are staying during this visit to PCB. n=24



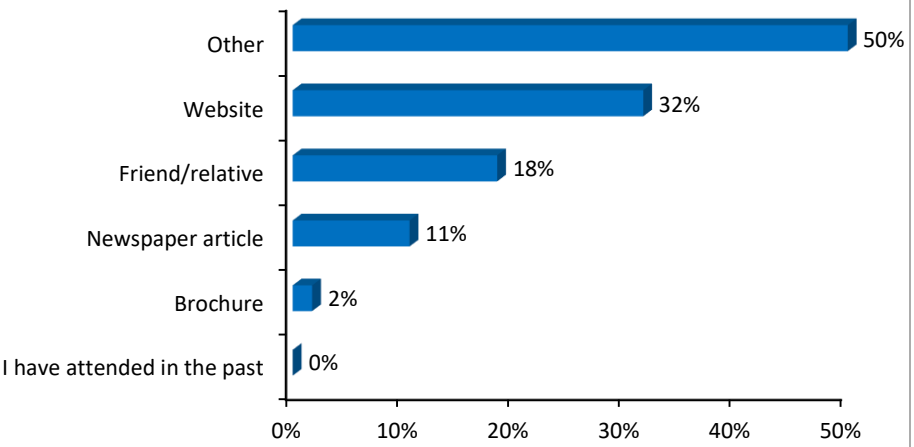
Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=61



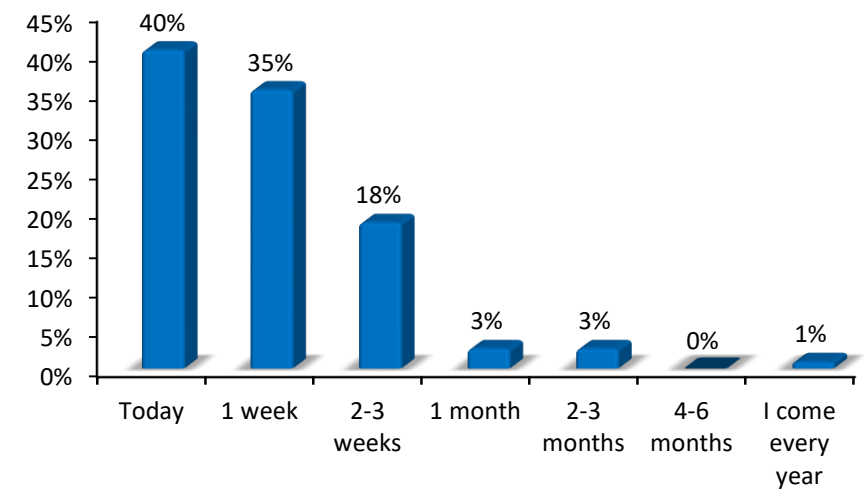
Panama City Beach Convention and Visitors Bureau Emerald Coast Boat and Lifestyle Show

Trip Planning and Purpose

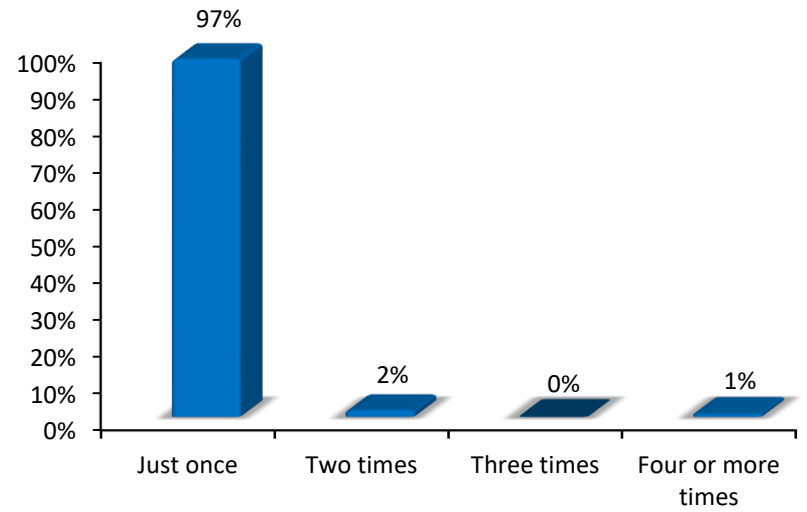
How did you find out about the festival? n=114



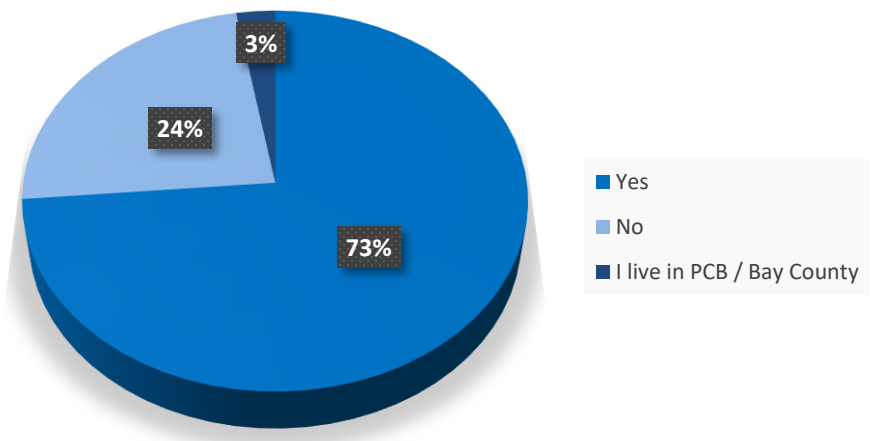
How far in advance did you plan to attend this festival/event? n=119



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



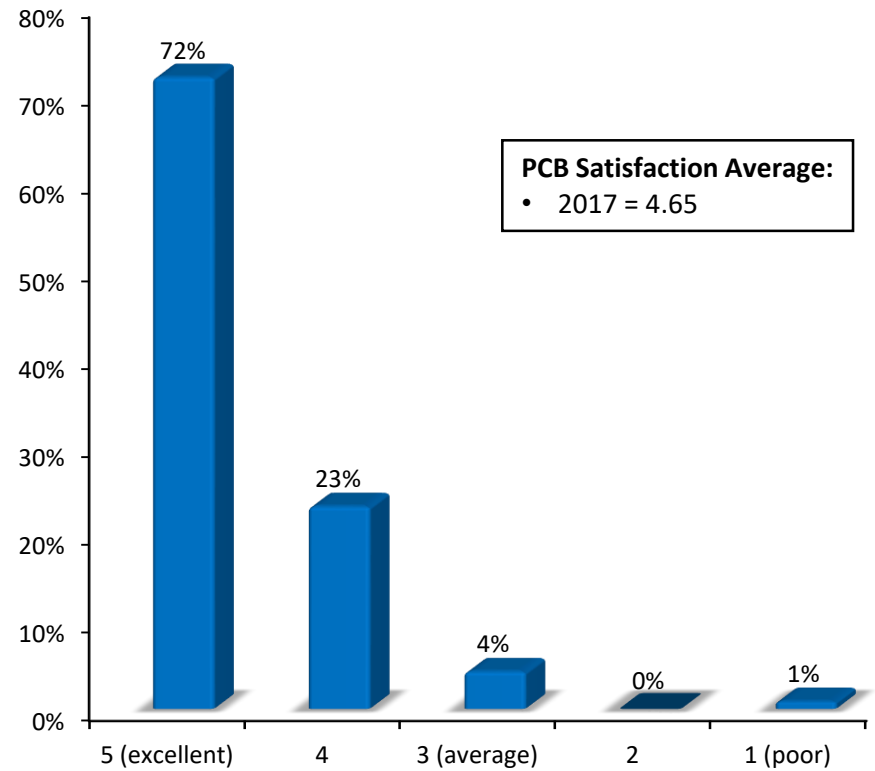
Was attending this festival your primary purpose for visiting Panama City Beach? n=110



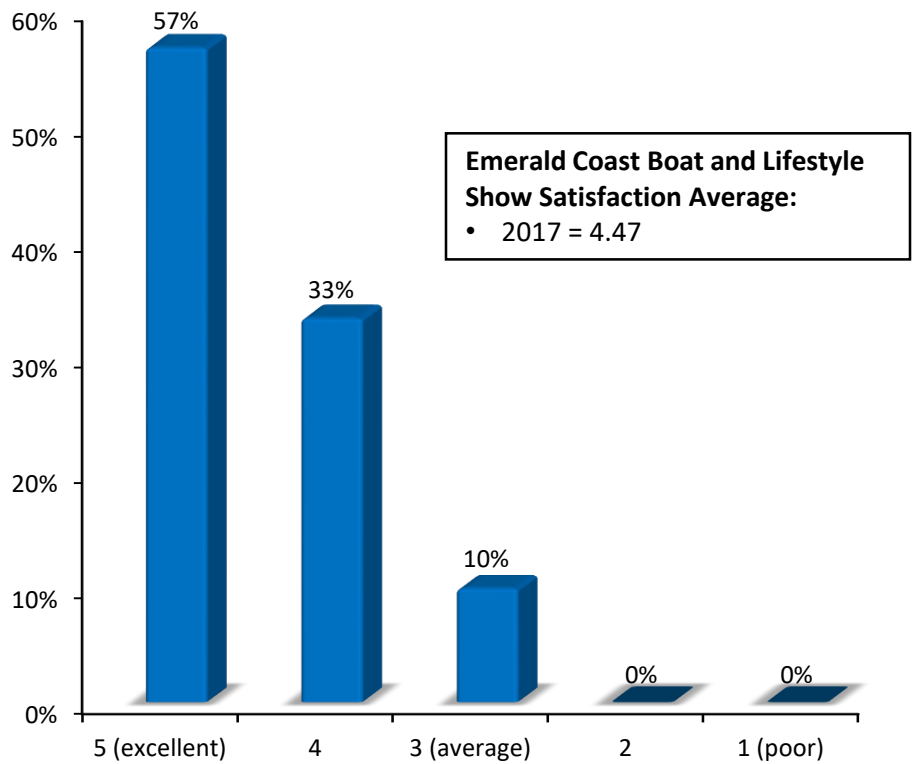
Panama City Beach Convention and Visitors Bureau Emerald Coast Boat and Lifestyle Show

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=117



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Emerald Coast Boat and Lifestyle Show? n=120



Observations:

- Overall trip satisfaction to Panama City Beach rated at a 4.65 on a 5-point scale.
- Emerald Coast Cruizin Boat and Lifestyle Show rated at a 4.47 on a 5-point scale.

Panama City Beach Convention and Visitors Bureau

Emerald Coast Boat and Lifestyle Show

Travel PARTY Spending (Total Trip)

Spending Category	2017
Lodging (% of reporting)	\$1,062.50 (3.3%)
Dining/Food (% of reporting)	\$65.17 (45.0%)
Shopping (% of reporting)	\$120.45 (9.2%)
Bars/Nightclubs (% of reporting)	\$14.50 (1.7%)
Local Transportation (% of reporting)	\$0.00 (0.0%)
Tickets/Admissions (% of reporting)	\$0.00 (0.0%)
Average Total Spending Per Travel Party (% of reporting)	\$584.47* (89.2%)
Average total # in Travel Party	3.0
Average Length of Stay	39.4 nights

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

Verbatim Comments:

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

- Chipley
- Fort Walton
- Mexico Beach

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

- AL
- Blue Water
- Bonity
- Chipley (2)
- Columbia Ga
- Compas Lake
- Crestview
- Destin (2)
- Dothan (4)
- Fort Walton (2)
- Freeport (2)
- Marianna
- Mirramar Beach (2)
- Navarre Beach
- Niceville (5)
- Paxton
- Pensacada (2)
- Port St Joe (9)
- Ronity
- Rosemary Road
- Samson AL
- Sand Destin
- Santa Rosa (5)
- Tynall (2)
- Valpriza
- Walton (3)
- Walton County (2)
- Water Sound
- Youngtown

Please tell us what websites you used to find information about the festival:

- Boat Show
- Bullet
- Email
- Email through Marine Max
- Facebook (15)
- Google (4)
- Half Hitch email
- Industry
- Marine Max (4)
- Nautic Star
- PCB (3)
- Vendors-email

Panama City Beach Convention and Visitors Bureau

Emerald Coast Boat and Lifestyle Show

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How can we improve your experience to this festival?

Top 3 responses:

- 1. More Vendors**
 - 2. More boats / Info on boats**
 - 3. Lower price**
- Awesome!
 - Bigger boats
 - Boats didn't have price
 - Cabin boats
 - Credit Union should be here for credit!
 - Cruisers (2)
 - Don't like paying to get in
 - Food vendors (2)
 - Just moved here to retire from Chicago
 - Marine electronics- vendor?
 - More boat acc. different types of boats
 - More boats- glass awesome
 - More food vendors (3)
 - More food vendors. Boat trials
 - More stage energy
 - More vendors- clothes
 - More vendors- electronics
 - More vendors- food
 - More vendors- food and drink
 - Move food vendors- Cabin boats.
 - Need boating accessories
 - Need small boats- also shade
 - Needs to be bigger.
 - No enough info- wants grouped by type of boat
 - No Yamaha boats
 - Not enough vendors- Nautical theme
 - Sea fox?
 - Smaller boats
 - Too much to get into the show
 - Very nice for first year

How can we improve you experience in PCB?

- Booze/ vendors
- Missing vendor- need loan office
- More vendors
- RV's need to have
- Sail boats
- Side Walk
- To pay- Boats
- Traffic

How did you find out about the festival?

Other:

- Billboard
- Channel 13
- Dealer
- Drove by and saw (8)
- Flyer
- Fort Walton Marine
- News
- PCB attraction
- Pirate Cove email
- Post Card in email
- Radio (16)
- Sign and P.P entry boat
- Signs (3)
- TV (19)
- Visitor Center
- WJHG (2)



Emerald Coast Cruizin' Car Show

March 8-11, 2017

N=120

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews March 8th-11th at a random series of locations throughout Aaron Bessant Park.



Summary of Festival Survey Responses

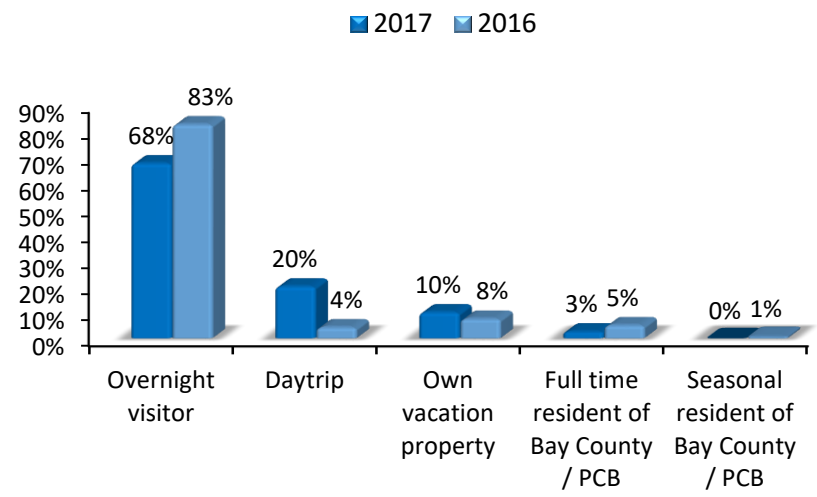


Emerald Coast Cruzin' Festival Reponse Summary

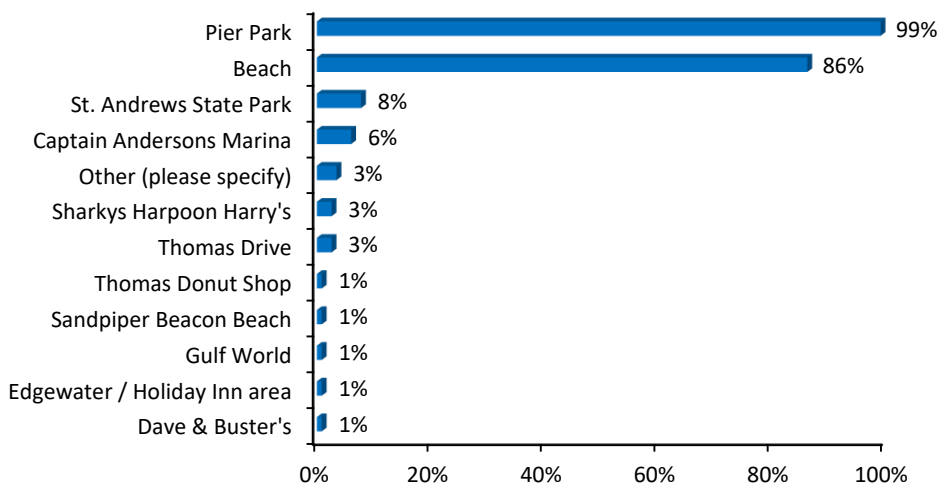
- Respondents were an average age of 61 with the following generational break down (100% of respondents were adults 18+ years of age):
 - **Baby Boomer (50-67) – 59%**
 - **Generation X (29-49) – 11%**
 - **Generation Y (18-28) – 2%**
 - **Silent Generation (68-86) – 28%**
- 32% of respondents were female, and 68% were male.
- **Point-of-origin – Respondents came from 16 states with the largest portion of respondents from Alabama (35%), followed by Florida and then Mississippi.**
- Pre-trip planning – **21% plan 2-3 months prior to their visit**, followed by **18% planning 1 week** before their visit.
- Average length of stay in PCB = 4.1, slightly down from 2015 length of stay at 4.5 nights.
- Average party size attending the festival was 3.6, up from the 2016 average of 2.7, with 2 being the most frequent response.
- PCB visit satisfaction slightly lower in 2017 at 4.69 on a 5-point scale compared to the 2016 rating of 4.80. 2017 ratings are still above the 2015 rating of 4.62
- Overall rating of Emerald Coast Cruzin' was 4.52, which is down from 4.63 in 2016.
- Average party spending while in PCB: \$984.74, down from 2016's total spending of \$1,006.66.

Panama City Beach Convention and Visitors Bureau Emerald Coast Cruizin'

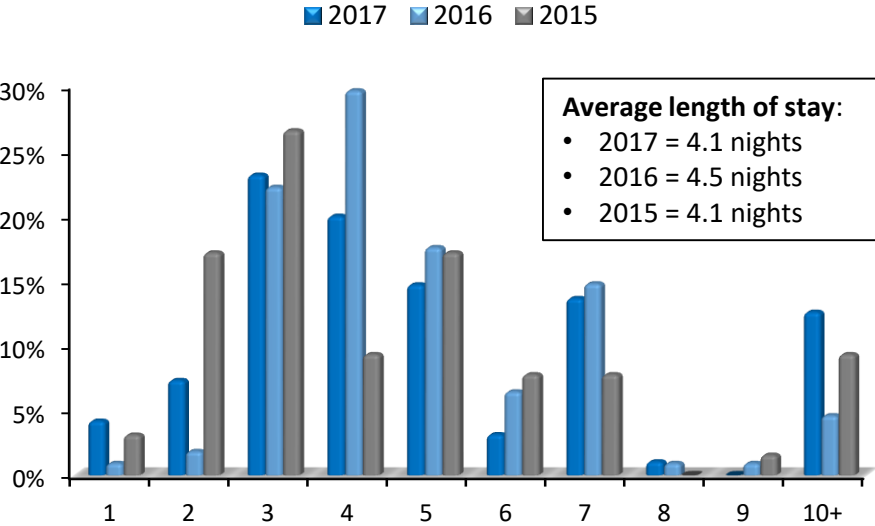
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=120



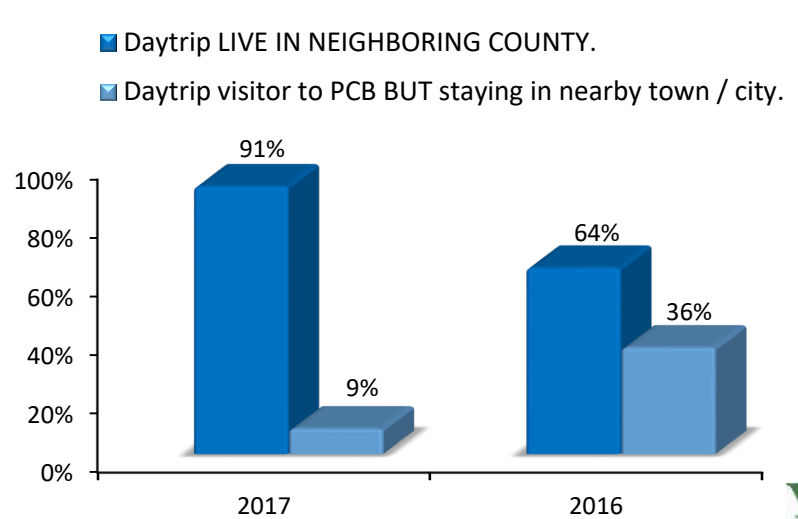
What other attractions/areas did you/someone in your group visit on THIS trip to PCB? n=116



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



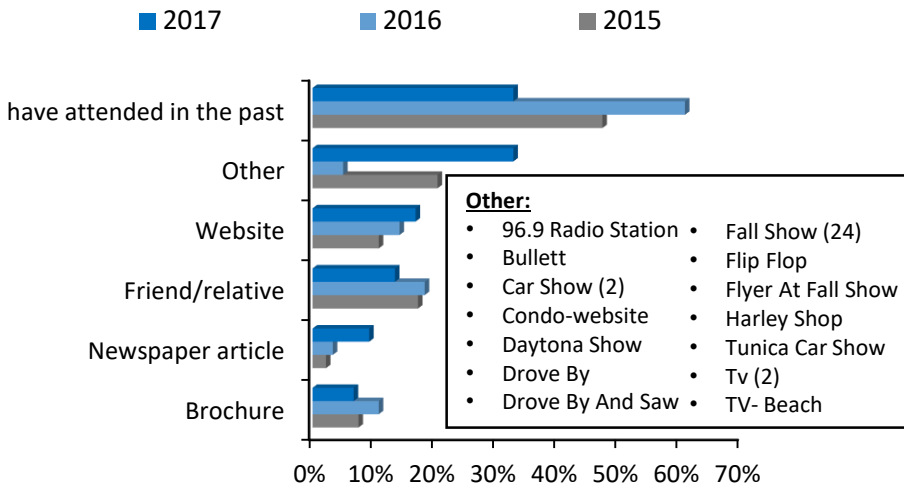
Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=23



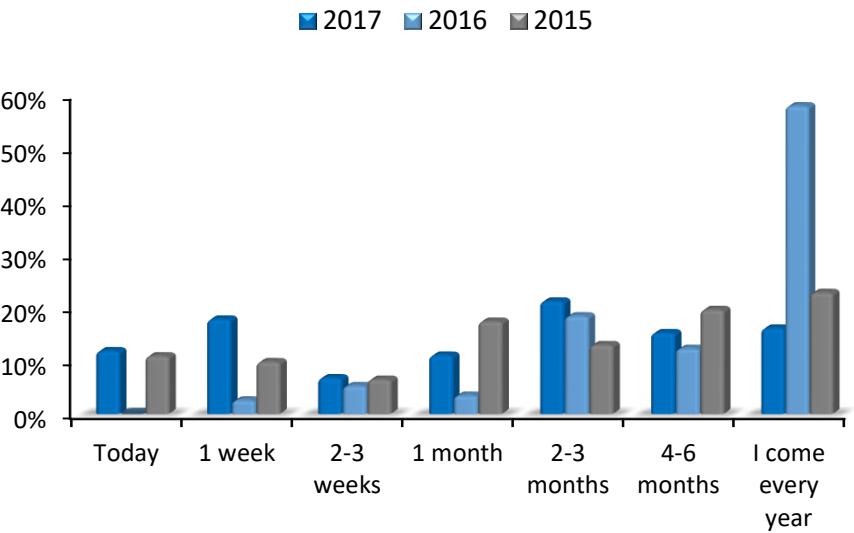
Panama City Beach Convention and Visitors Bureau Emerald Coast Cruzin'

Trip Planning and Purpose

How did you find out about the festival? n=119

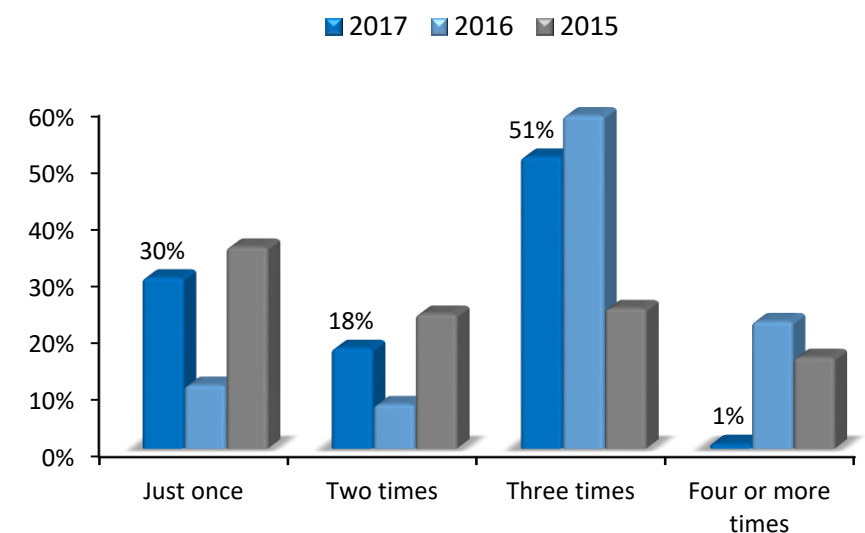


How far in advance did you plan to attend this festival/event? n=118

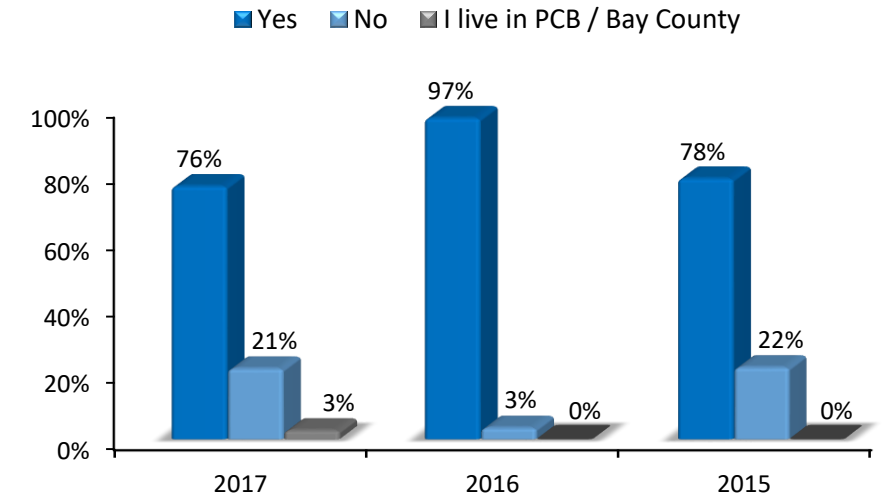


How many times will you or your group attend the festival this week?

n=113



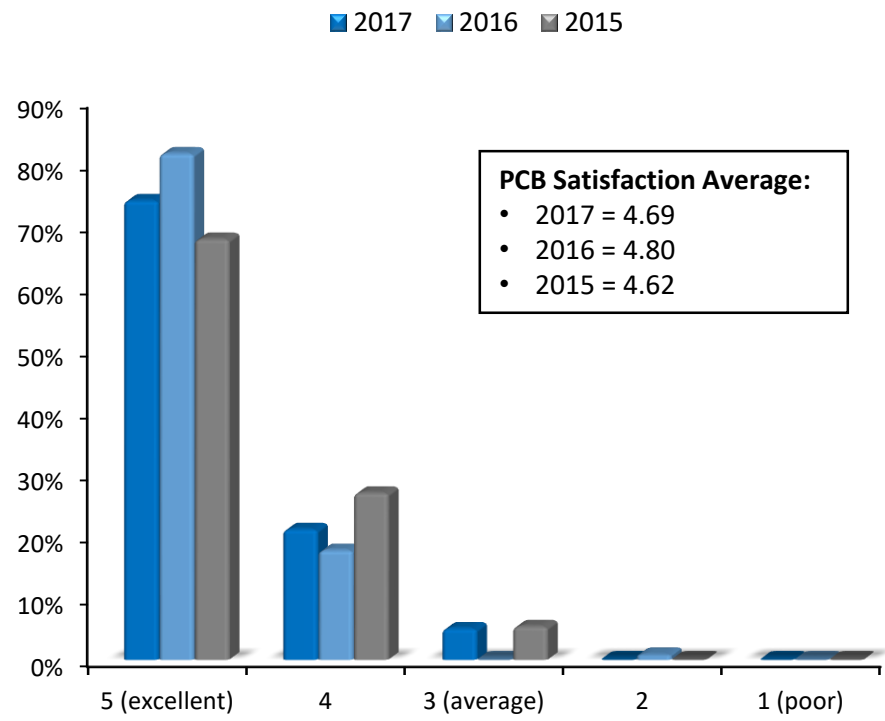
Was attending this festival your primary purpose for visiting Panama City Beach? n=113



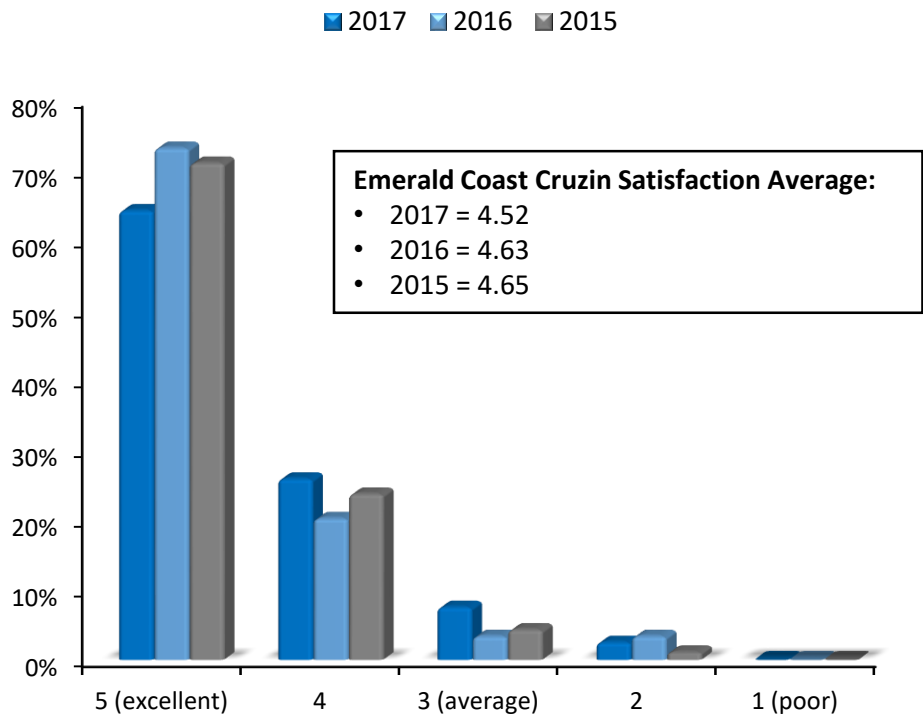
Panama City Beach Convention and Visitors Bureau Emerald Coast Cruzin'

Visitor Satisfaction

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



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Emerald Coast Cruzin' Festival? n=120



Observations:

- Overall trip satisfaction to Panama City Beach was a 4.69, on a 5-point scale.
- Emerald Coast Cruzin' Festival overall satisfaction was slightly down in 2017 with a rating of 4.52.

Panama City Beach Convention and Visitors Bureau Emerald Coast Cruzin'

Travel PARTY Spending (Total Trip)

Spending Category		2017	2016	2015
Lodging (% of reporting)	(40.8%)	\$573.16	\$509.44	\$538.23
Dining/Food (% of reporting)	(71.7%)	\$297.03	\$294.63	\$263.62
Shopping (% of reporting)	(55.0%)	\$310.91	\$221.20	\$214.89
Bars/Nightclubs (% of reporting)	(0.8%)	\$275.00	\$250.00	\$143.33
Local Transportation (% of reporting)	(22.5%)	\$50.74	\$62.51	\$81.45
Tickets/Admissions (% of reporting)	(1.7%)	\$100.00	\$0.00	\$112.45
Average Total Spending Per Travel Party (% of reporting)	(95.8%)	\$984.74*	\$1,006.66*	\$775.53*
Average total # in Travel Party		3.6	2.7	2.5
Average Length of Stay		4.1 nights	4.5 nights	4.1 nights



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

Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

- 1. More cars**
- 2. More vendors**
- 3. More activities**

- Ald part swap needed
- Auction- more buyers
- Auction/car show need to work together
- Awards? Need more info
- Awesome/more cars
- Cars and motorcycles
- Drawings earlier on last day
- Food on both sides of park and more vendors
- Food vendor- pretzels
- Give aways earlier
- Great show (3)
- Hotel needs better parking for trailers
- More activities at car show (2)
- More activities at the car show
- More cars (4)
- More cars and parts vendors
- More food vendors
- More seating benches
- More vendors (5)
- Music too loud! Radio
- Need car show deal at hotels
- Need reserved spots
- Need swap mat car parts
- Not as many cars
- Popcorn- fresh
- Self
- Some newer calls
- Spring break
- Too expensive
- Turn down music, radio too loud

How can we improve your experience to this festival?

- Eddie needs to interact with crowd
- More access of facilities
- Spring Break

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

- Destin
- Bay Minette AL

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

- Destin (2)
- Dothan (3)
- Freeport, FL
- Ft. Walton
- Lucedale, MS
- Marianna (2)
- Mexico Beach
- Mitton
- Navarre
- Niceville
- Sand Destin
- Santa Rosa (4)
- St. Terese
- Williston

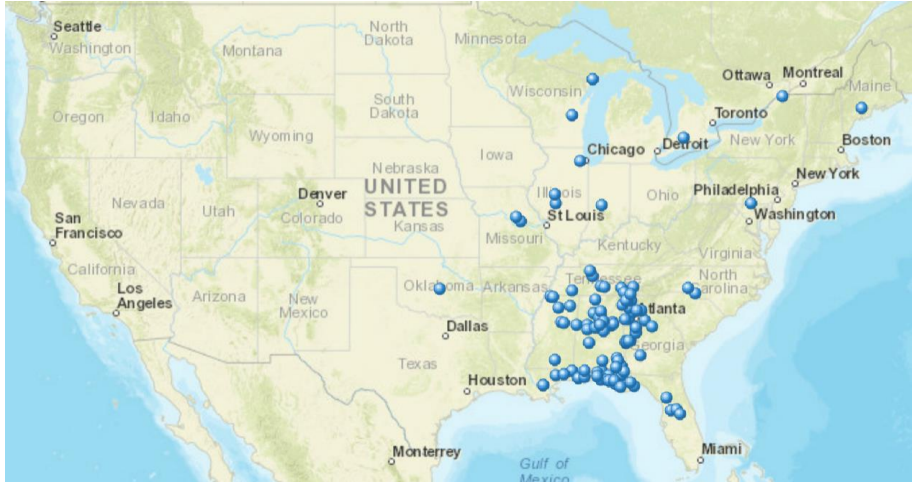
Please tell us what websites you used to find information about the festival?

Other:

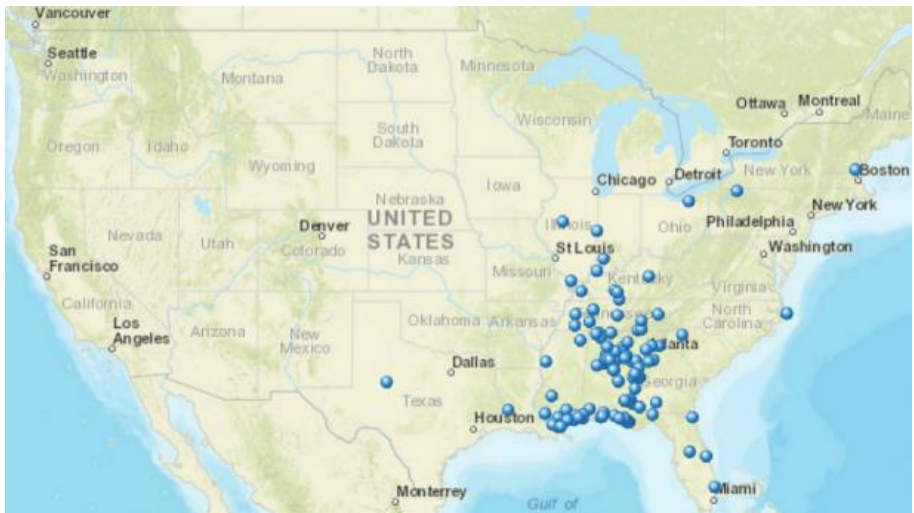
- Facebook (11)
- Flip Flop (2)
- Google (3)
- PCB

Panama City Beach Convention and Visitors Bureau Emerald Coast Cruizin'

2017 Respondent Point of Origin

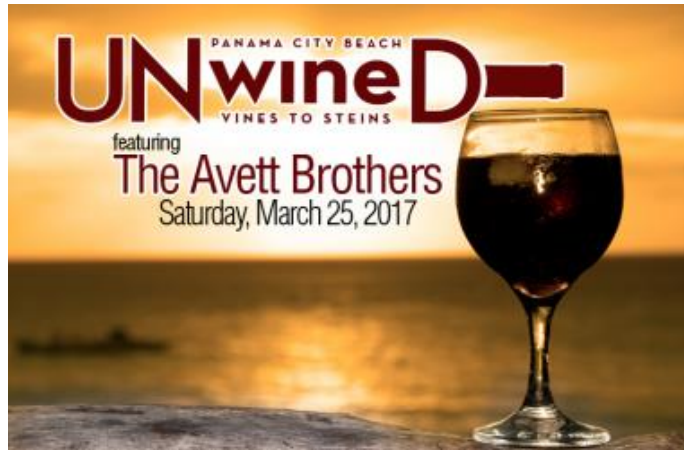


2016 Respondent Point of Origin



2015 Respondent Point of Origin





UNwineD

March 24-25, 2017

N=120

UNwineD Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews on March 25 at a random series of locations throughout Aaron Bessant Park.

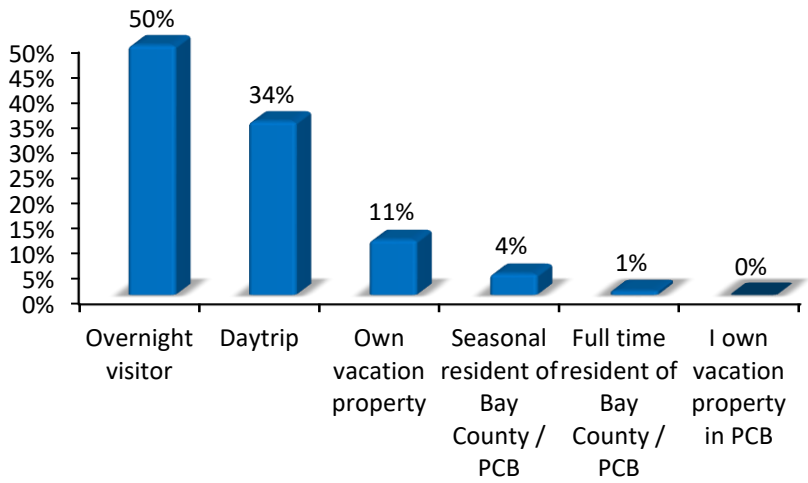
Summary of Festival Survey Responses



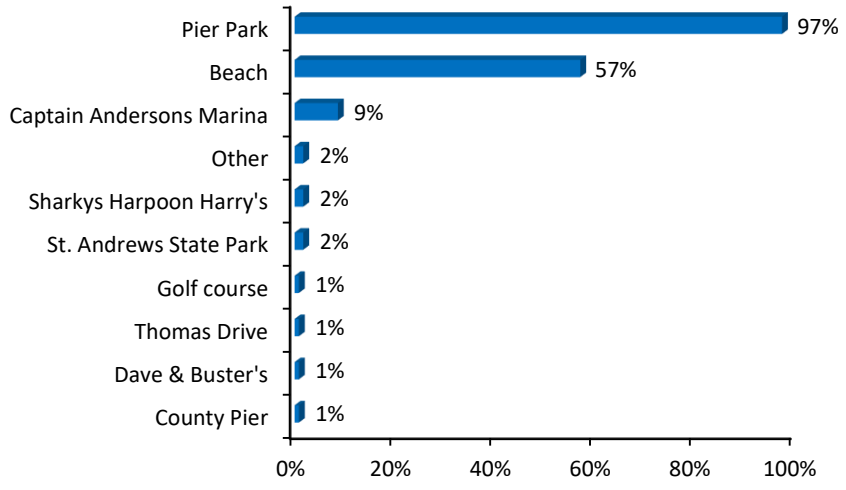
UNwineD Survey Response Summary

- Respondents were an average age of **42.2** with the following generational break down (100% of respondents were adults 18+ years of age):
 - **Baby Boomer (50-67) – 74.2%**
 - **Generation X (29-49) – 17.7%**
 - **Generation Y (18–28) – 0.8%**
 - **Silent Generation (67-89) – 7.3%**
- 62% of respondents were female, and 38% were male.
- **Point-of-origin** – Respondents came from **20 states** with the largest portion of respondents from **Florida (26%)**, followed by Georgia and then Alabama.
- **Pre-trip planning** – **38%** said they decided to attend UNwineD the day of the festival, followed by **29% planning 1 month prior to their visit**.
- Average length of stay in PCB = 2.7 nights; 45.8% reported a lodging expenditure.
- Average party size attending the festival was 3.0 with 2 being the most frequent response.
- PCB visit satisfaction rated low at a 4.70 on a 5-point scale.
- Overall rating of UNwineD was a 4.82 which is up from the 2015 rating of 4.71.
- Average party spending while in PCB: \$369.05.

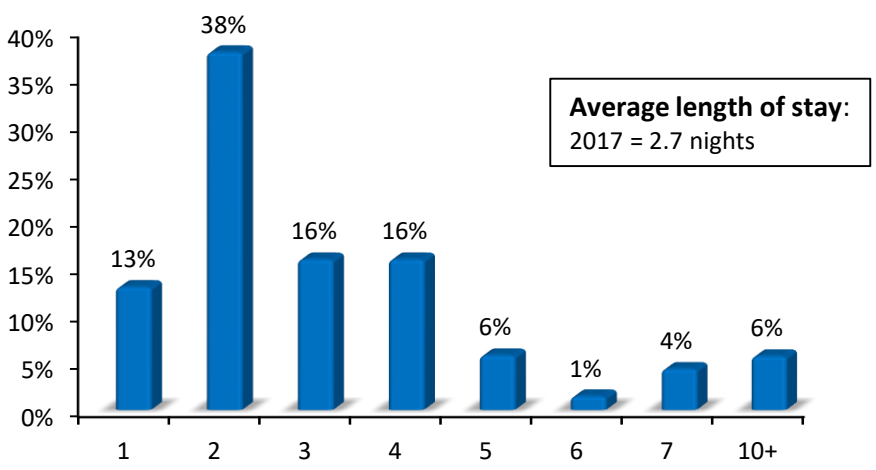
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=120



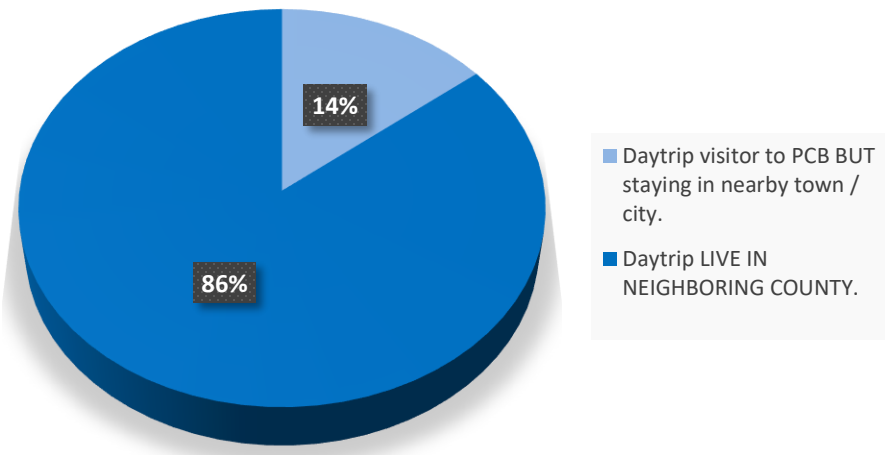
What other attractions/areas did you/someone in your group visit on THIS trip to PCB? n=116



Please specify the number of nights you are staying during this visit to PCB. n=58

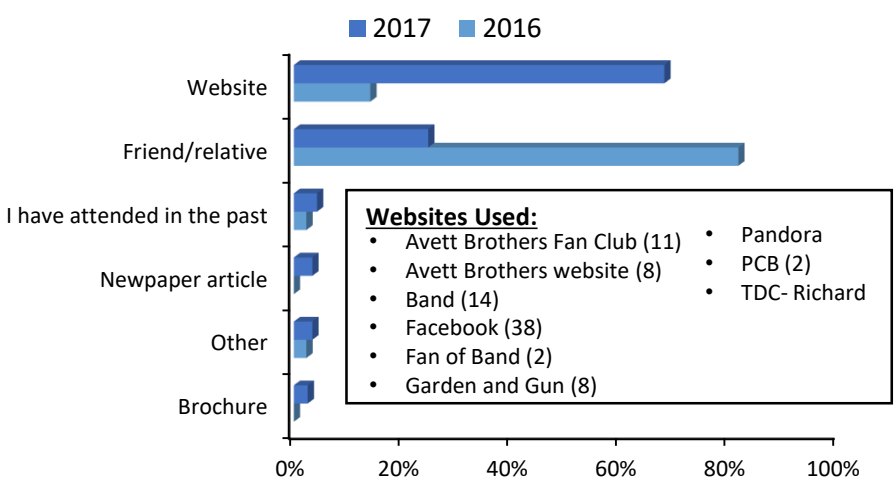


Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=24

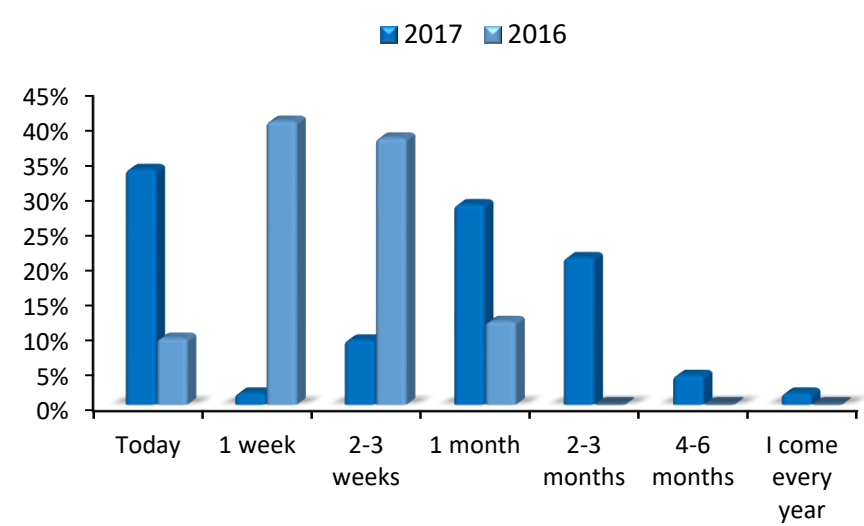


Trip Planning and Purpose

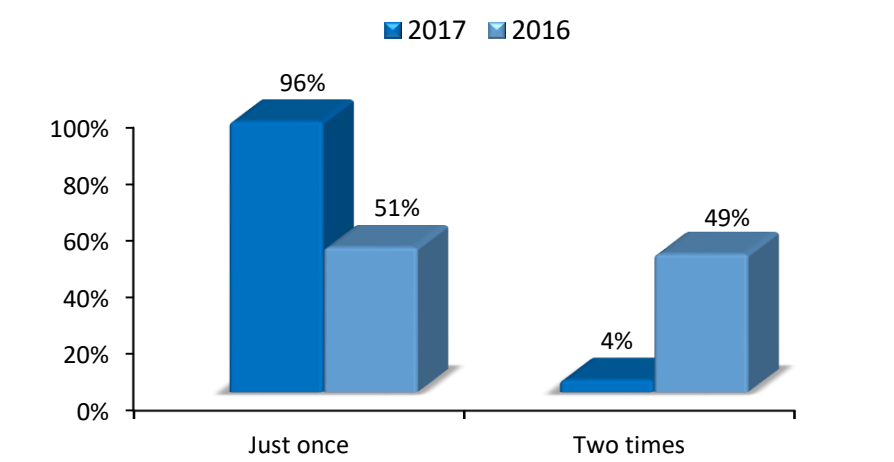
How did you find out about the festival? n=118



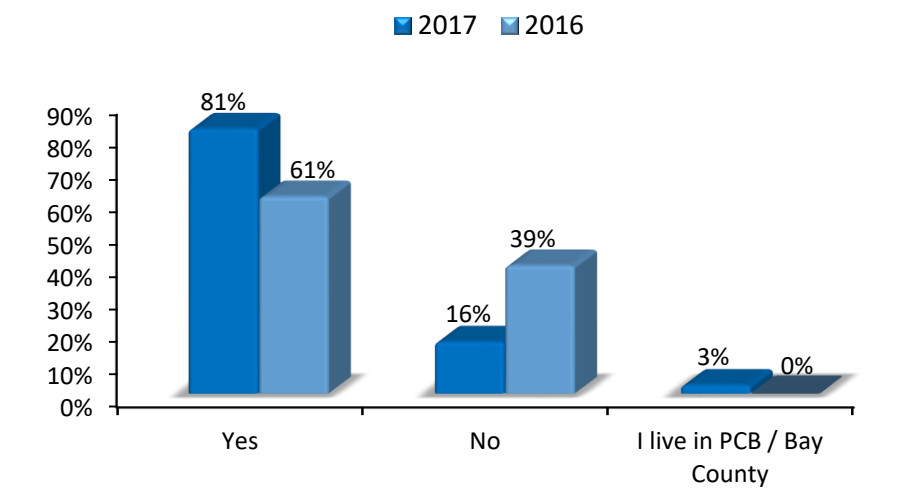
How far in advance did you plan to attend this festival/event? n=119



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

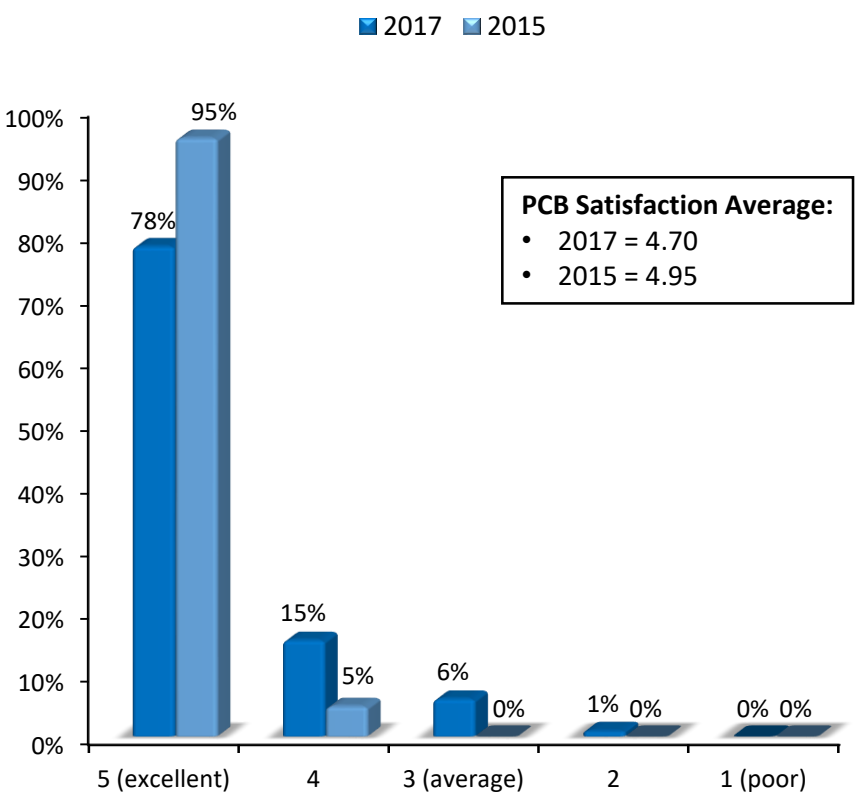


Was attending this festival your primary purpose for visiting Panama City Beach? n=119

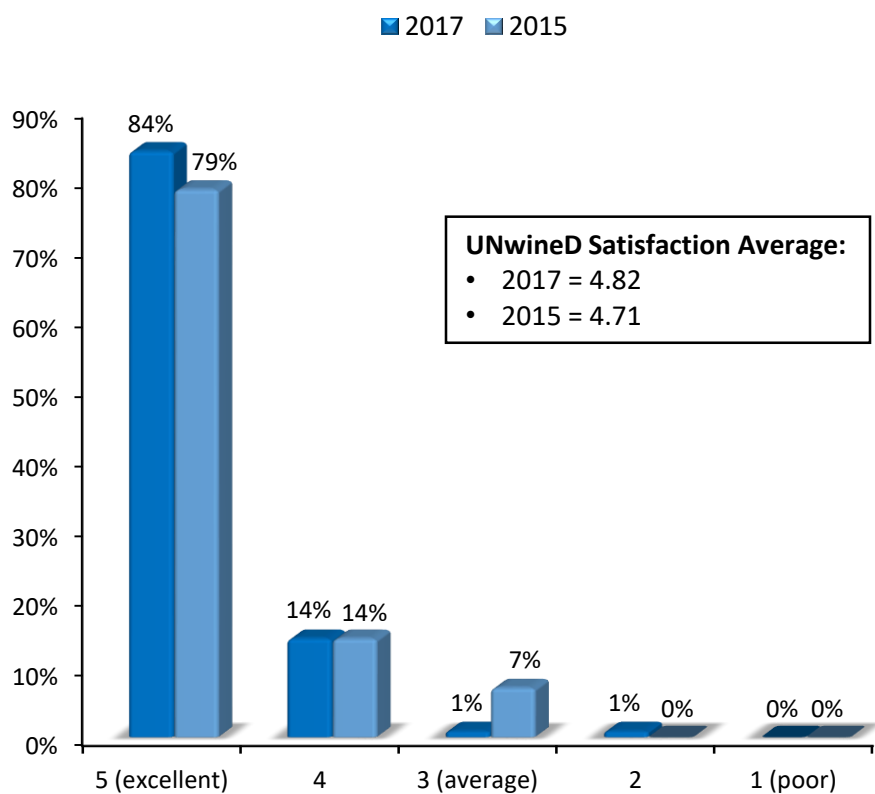


Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=118



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



Observations:

- Overall trip satisfaction to Panama City Beach decreased from 4.95 in 2015 to 4.70 in 2017.
- UNwined overall satisfaction was up in 2017 to 4.82 from the 2015 rating of 4.71.

Panama City Beach Convention and Visitors Bureau

UNwined

Travel PARTY Spending (Total Trip)

Spending Category	2017
Lodging (% of reporting)	\$463.81 (13.3%)
Dining/Food (% of reporting)	\$160.63 (42.5%)
Shopping (% of reporting)	\$171.18 (14.2%)
Bars/Nightclubs (% of reporting)	\$200.00 (0.8%)
Local Transportation (% of reporting)	\$32.86 (5.8%)
Tickets/Admissions (% of reporting)	\$0.00 (0.0%)
Average Total Spending Per Travel Party (% of reporting)	\$369.05* (41.7%)
Average total # in Travel Party	3.0
Average Length of Stay	2.7 nights

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

Verbatim Comments:

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

- Port St Joe
- Seagrove
- Tallahassee
- Watersound

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

- Alford
- Andalousa
- Ashford
- Birmingham
- Chipley (2)
- Destin (2)
- East Point
- Freeport
- Ft. Walton (2)
- Inlet Beach
- Miramar Beach
- Pensacola (3)
- Rosemary Beach
- Santa Rosa (2)
- St. Pete
- Tallahassee
- Tampa
- Watersound

How did you find out about the festival?

Other:

- Pandora
- Radio (3)

Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

- 1. More water / Let people bring in water**
- 2. Better organization**
- 3. Better advertising**

- Alcohol (more)
- As nice as 30A wine event!
- Awesome!
- Better advertising
- Better organization
- Better organize
- Bigger
- Bottle of water
- Bringing in water
- Bringing water in
- Chair rentals
- Crowd size- nice
- Draft beer, more liquor
- Great event- happy with quiet spring break!
- More advertising (2)
- More food
- More info about event- specifics on website- PCB
- More non-alcohol option
- More organized/gates, good vendors
- More water (2)
- Not dogs, more good music
- Organization, different policy
- Pricing/local discount
- Time/confusing
- Water booths
- Water table
- Water table/ draft (more draft beer)
- Well organized

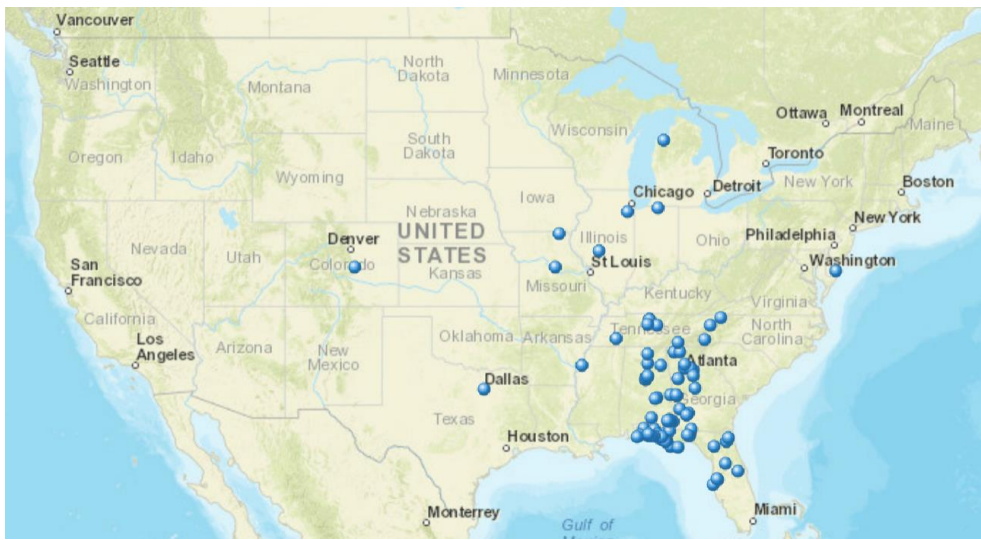
How can we improve your experience to PCB?

- 30A after event
- Cross walks needed
- infrastructure
- little nicer restaurants/attractions
- Love the quiet spring break
- More jazz options- music variety in PCB
- No drinking on the beach (good)
- Uber- great

Panama City Beach Convention and Visitors Bureau

UNwined

2017 Respondent Point of Origin



2015 Respondent Point of Origin



State - City	

SEABREEZE JAZZ FESTIVAL
THE ULTIMATE WEEKEND OF SMOOTH JAZZ



KENNY G
BRIAN CULBERTSON
BONEY JAMES
TOWER OF POWER
CANDY DULFER
RICK BRAUN
NORMAN BROWN
RICHARD ELLIOT
SHELIA E
PAUL BROWN
PIECES OF A DREAM
DARREN RAHN
PATTI AUSTIN
DOC POWELL
ERIC DARIUS
FOUR 80 EAST
ALTHEA RENE
MICHAEL LINGTON
KEN FORD
MATT MARSHAK
JAKE SHIMABUKURO
ROMAN STREET
ADAM HAWLEY
JEANETTE HARRIS

CELEBRATING 19 YEARS OF
SMOOTH JAZZ FESTIVALS

APRIL 19TH-23RD, 2017
SPONSORED BY



Seabreeze Jazz Festival

April 20-23, 2017

N=120

Seabreeze Jazz Festival Research Methodology Detail:

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

Summary of Festival Survey Responses

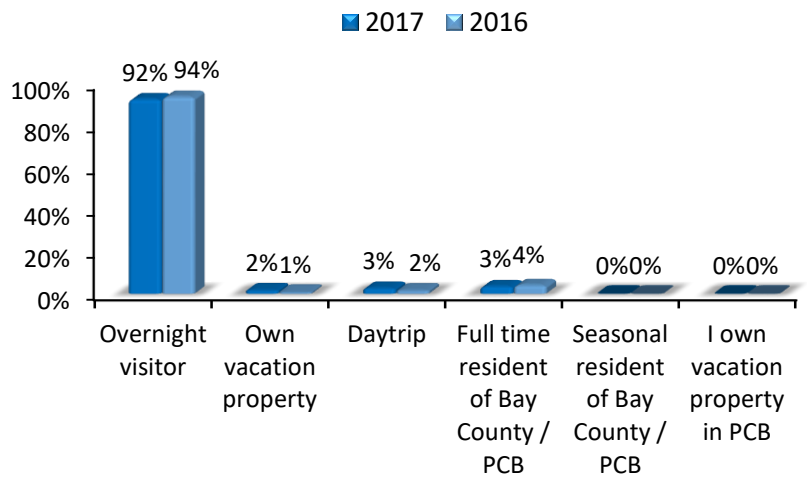


Seabreeze Jazz Festival Survey Response Summary

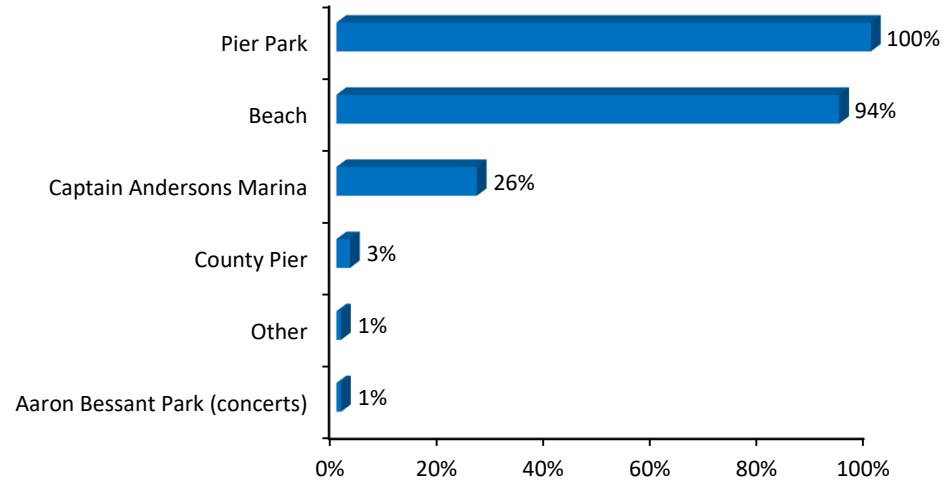
- Respondents were an average age of **56.2** with the following generational break down (100% of respondents were adults 18+ years of age):
 - **Baby Boomer (50-67) – 74.2%**
 - **Generation X (29-49) – 17.7%**
 - **Generation Y (18-28) – 0.8%**
 - **Silent Generation (67-89) – 7.3%**
- 47% of respondents were female, and 53% were male.
- **Point-of-origin – Respondents came from 20 states with the largest portion of respondents from Florida (26%), followed by Georgia and then Alabama.**
- Pre-trip planning – **44%** come to the festival every year, followed by **28% planning 4-6 months prior to their visit.**
- Average length of stay in PCB = 4.3 nights in 2017 and 2016; 90% reported a lodging expenditure.
- Average party size attending the festival was 5.0 with 4 being the most frequent response.
- PCB visit satisfaction rated highly at a 4.73, compared to a rating of 4.56 in 2016.
- Overall rating of Seabreeze Jazz Festival was a 4.73 which is up from the 2016 rating of 4.59.
- Average party spending while in PCB: \$1,469.78.

Panama City Beach Convention and Visitors Bureau Seabreeze Jazz Festival

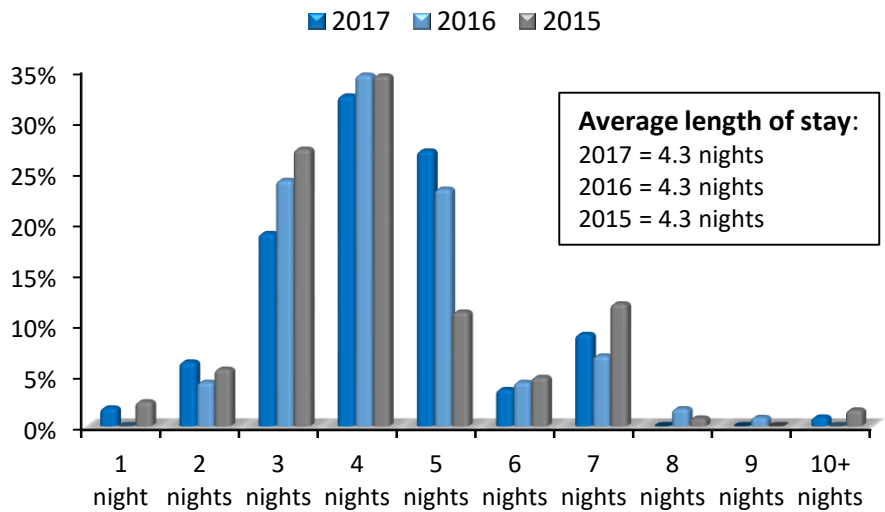
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=119



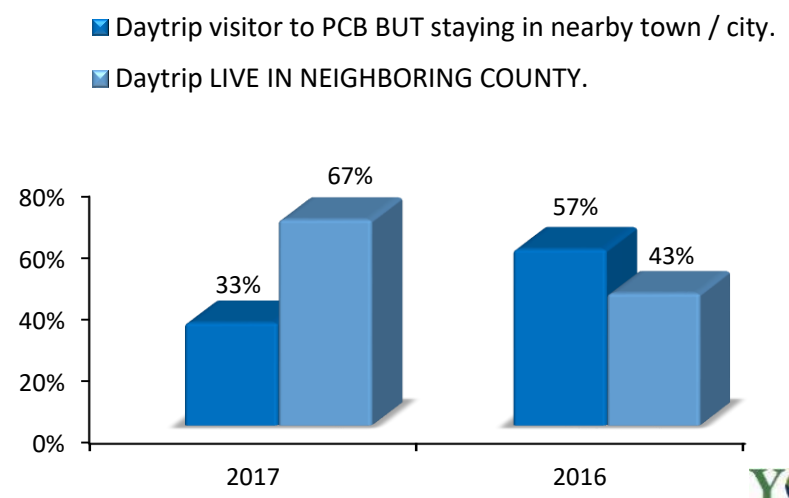
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=118



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



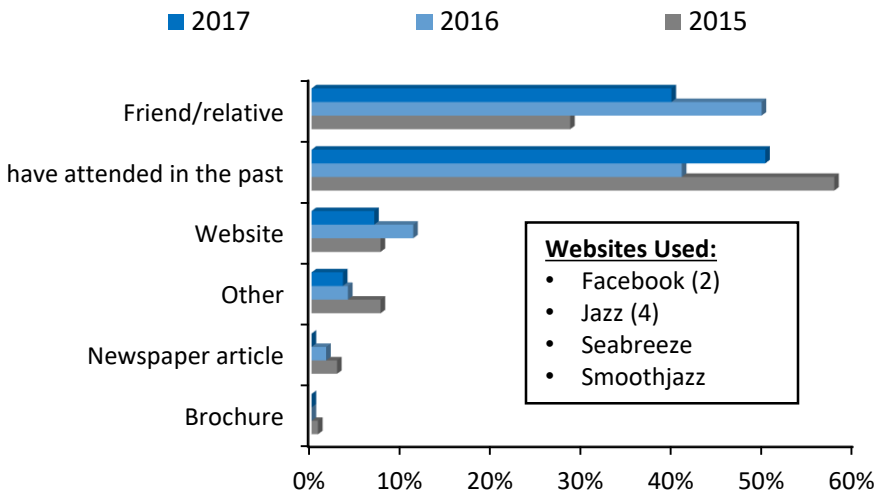
Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=3



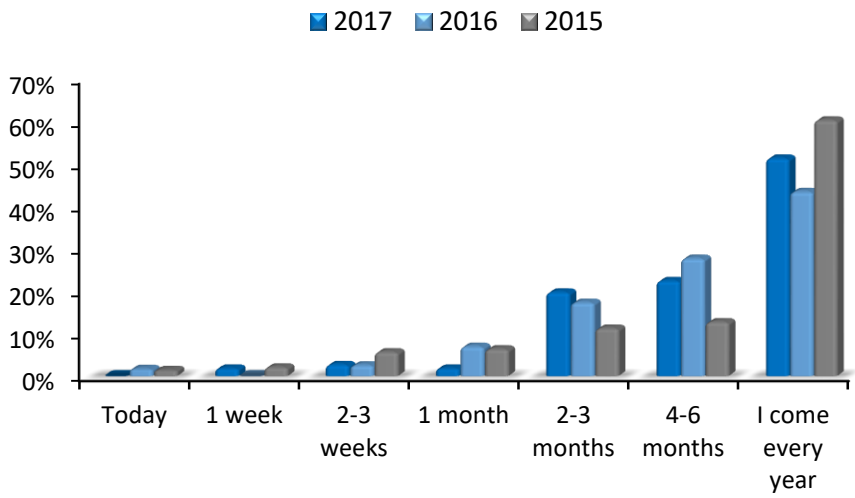
Panama City Beach Convention and Visitors Bureau Seabreeze Jazz Festival

Trip Planning and Purpose

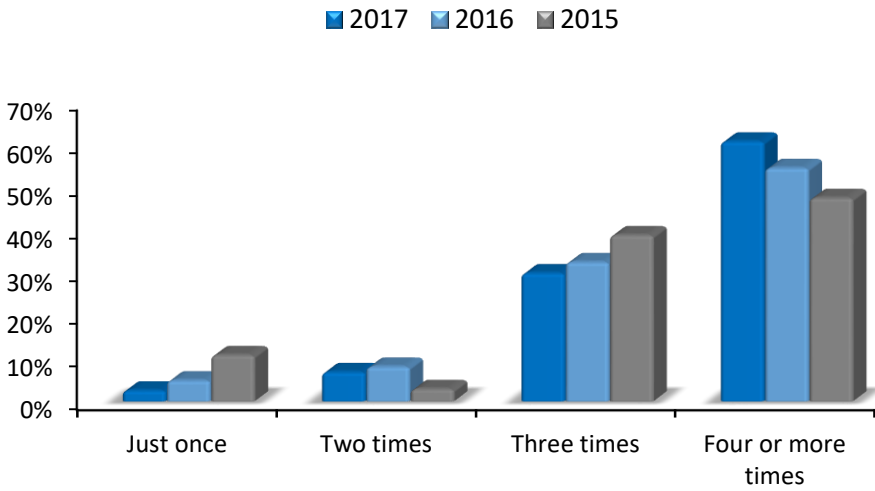
How did you find out about the festival? n=116



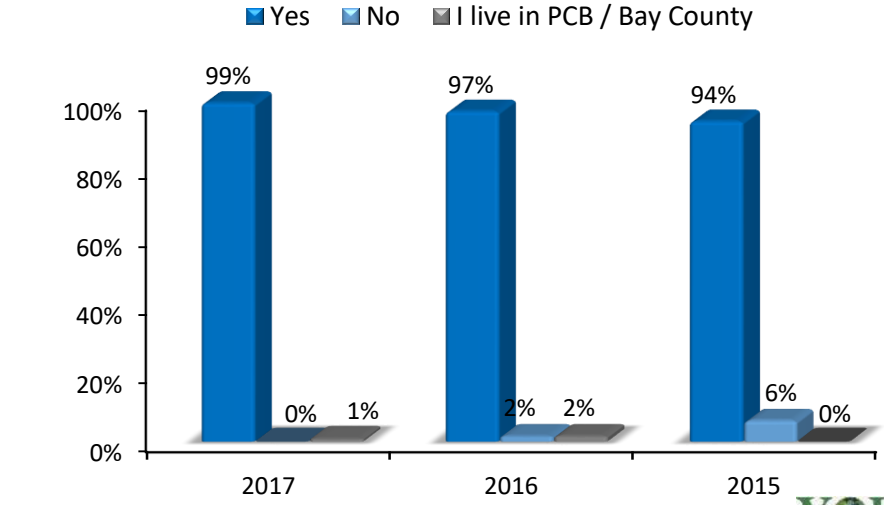
How far in advance did you plan to attend this festival/event? n=111



Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=117



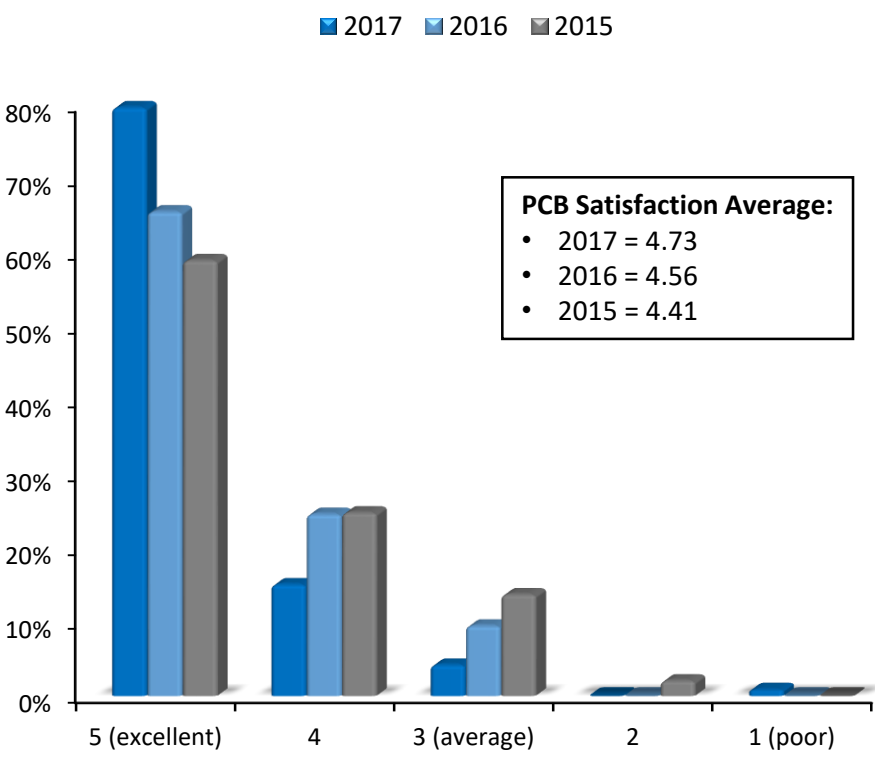
Was attending this festival your primary purpose for visiting Panama City Beach? n=118



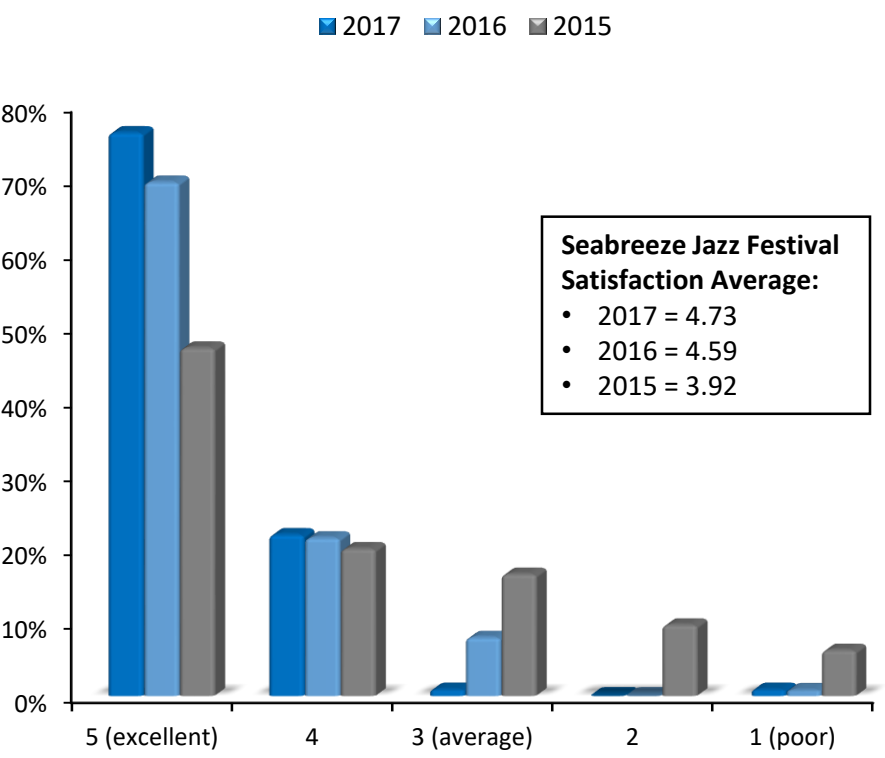
Panama City Beach Convention and Visitors Bureau Seabreeze Jazz Festival

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=118



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Seabreeze Jazz Festival? n=118



Observations:

- Overall trip satisfaction to Panama City Beach increased from 4.56 in 2016 to 4.73 in 2017.
- Seabreeze Jazz Festival overall satisfaction in 2017 was a 4.73 on a 5-point scale. This is up from 4.59 in 2016. 76% of respondents rated their visit to the festival as excellent in 2017 compared to 70% in 2016.

Panama City Beach Convention and Visitors Bureau

Seabreeze Jazz Festival

Travel PARTY Spending (Total Trip)

Spending Category	2017	2016	2015
Lodging (% of reporting)	\$876.42 (43.3%)	\$842.19 (67.2%)	\$964.19 (81.9%)
Dining/Food (% of reporting)	\$313.87 (52.5%)	\$330.83 (57.6%)	\$333.81 (89.6%)
Shopping (% of reporting)	\$261.69 (40.0%)	\$241.40 (34.4%)	\$216.26 (66.0%)
Bars/Nightclubs (% of reporting)	\$134.29 (5.8%)	\$207.50 (9.6%)	\$160.00 (34.0%)
Local Transportation (% of reporting)	\$37.08 (0.8%)	\$50.00 (0.8%)	\$176.54 (74.3%)
Tickets/Admissions (% of reporting)	\$0.00 (0.0%)	\$200.00 (9.6%)	\$96.00 (4.2%)
Average Total Spending Per Travel Party (% of reporting)	\$1,469.78* (96.7%)	\$1,057.73* (76.0%)	\$1,499.17* (88.9%)
Average total # in Travel Party	5	3.4	3.1
Average Length of Stay	4.3 nights	4.3 nights	4.3 nights

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

Verbatim Comments:

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

- Jefferson Parist, LA

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

- Destin
- Navarre Beach

How did you find out about the festival?

Other:

- Cancun Jazz Fest
- Radio (3)

Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

1. More shade

2. Allow coolers / Bring water in

3. More vendors

- \$ Food
- \$ Price of vendors, bring in water
- All good (3)
- All good- parking
- Allow snacking- food allergy
- Awesome festival
- Bad sound
- Better direction signs to event
- Better signs to parking
- Better vendors
- Better vendors (higher end)... Free ice.
- Better vendors, healthy options
- Bring coolers
- Bring coolers in
- Bring coolers-water
- Bring water
- Came to see shelia E.
- Cash to vendors, bands are bad!
- Cd- should be displayed. Gold needs security and only allow gold in
- Charging station for phones
- Cold wine
- Coolers
- Designated smoking area
- Don't like bands
- Don't like bands- more vendors
- Earlier shuttle
- Food \$
- Fresh vendor- fruits/ veggies.
- Great festival
- Handicap access needs to be improved

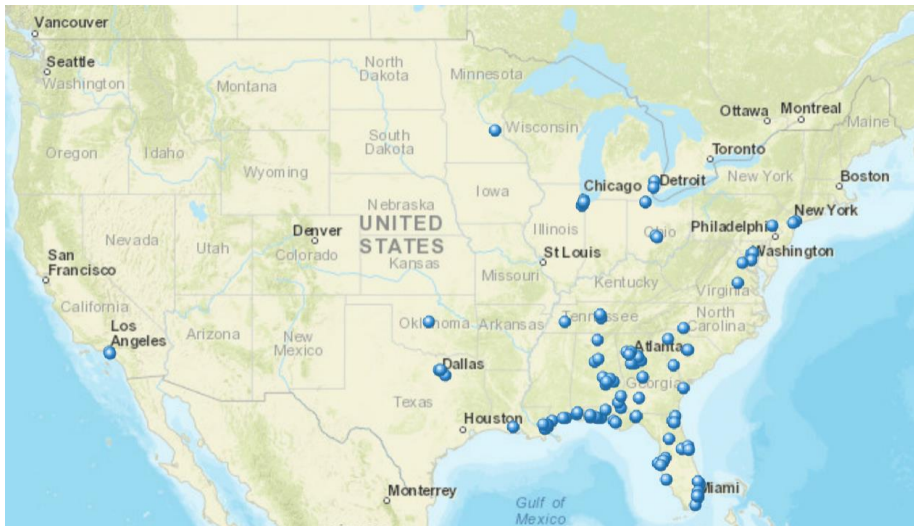
- Like cash bands- vendors very convenient- need cup salad
- Line control not fair-healthy food vendors
- Long lines to get in
- Meeting friend from america flew in
- More artists- vendors selling art
- More artists.
- More boat excursions, more high quality sales
- More consistent artists, big names, and fewer artists with longer sets. Not so strict on bringing in snacks, healthy food options, and allow to bring in coolers.
- More food selection- bring water and ice
- More shade (6)
- More shaded areas.
- More vendors.
- More water stations
- Need healthy food choices
- Night lighting
- No arm bands
- Shade (4)
- Shade- chairs now better in gold section
- Shade, raise the screens!
- Shirt market- ran out of stuff, problem with \$ loading on band- customer service helpful
- Shorter charge over time between groups- need coolers
- Sound quality- food side
- Vendor prices bad
- Vendors- more variety, and healthy food
- Vendors(healthy food)
- Very organized, great!!
- Waiting to get in took too long.
- Water- allow to bring
- Well organized and prepared, more vendors

How can we improve your experience to this festival?

- Cigar vendor needed cigar area
- More healthy food vendors
- More vendors
- Need shuttle bus
- No cigars smoking
- No money bands
- Wonderful, need to have set up

Panama City Beach Convention and Visitors Bureau Seabreeze Jazz Festival

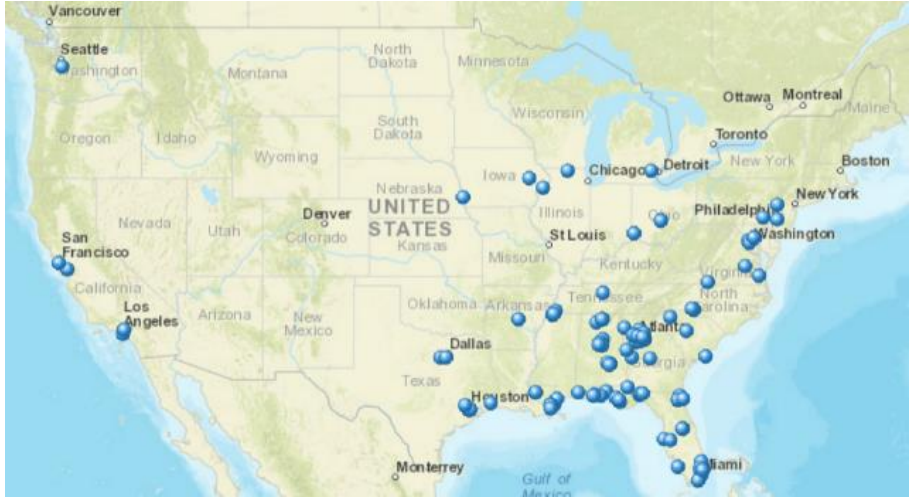
2017 Respondent Point of Origin



2015 Respondent Point of Origin



2016 Respondent Point of Origin



State - City	

Thunder Beach Spring Rally

May 3-7, 2017

N=120

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews May 3rd – May 7th at a random series of locations throughout Frank Brown Park and at the Harley Dealership.



Panama City Beach Convention and Visitors Bureau

Thunder Beach Spring Rally

44

Summary of Festival Survey Responses

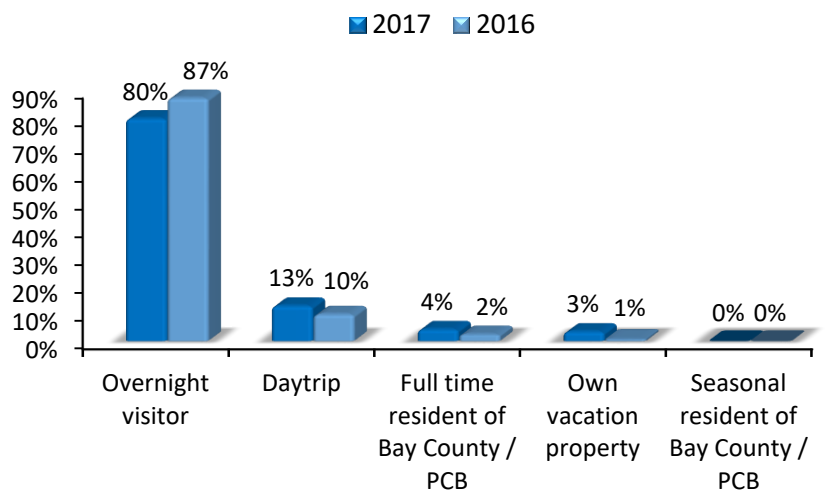


Thunder Beach Festival Reponse Summary

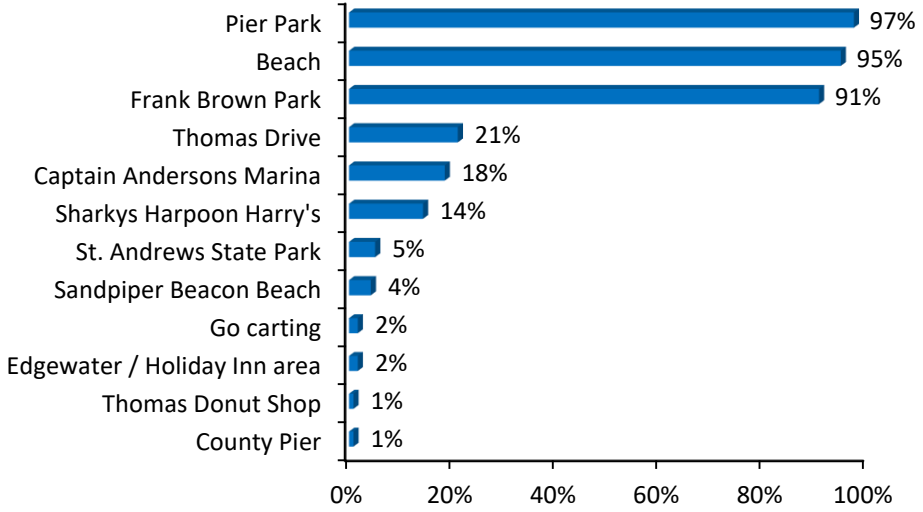
- Respondents were an average age of **50.5** with the following generational break down (100% of respondents were adults 18+ years of age):
 - **Baby Boomer (50-67) – 54%**
 - **Generation X (29-49) – 39%**
 - **Generation Y (18-28) – 4%**
 - **Silent Generation (69-86) – 3%**
- 25% of respondents were female, and 75% were male.
- **Point-of-origin – Respondents came from 17 states with the largest portion of respondents from Alabama (33%), followed by Florida and then Georgia.**
- **Pre-trip planning – 76% come to the festival every year, followed by 10% planning 2-3 months prior to their visit.**
- Average length of stay in PCB was 4.8 nights.
- Average party size attending the festival was 6.9, with 4 being the most frequent response.
- Overall trip satisfaction to Panama City Beach was slightly lower in 2017 at 4.75 compared to the 2016 rating of 4.83.
- Festival satisfaction rated at a 4.58 on a 5-point scale.
- Average party spending while in PCB: **\$1,090.79**

Panama City Beach Convention and Visitors Bureau Thunder Beach Spring Rally

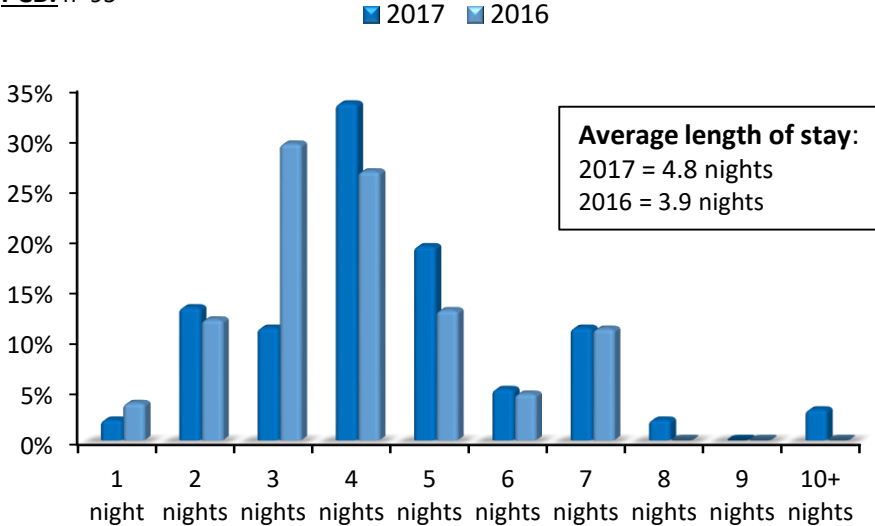
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=119



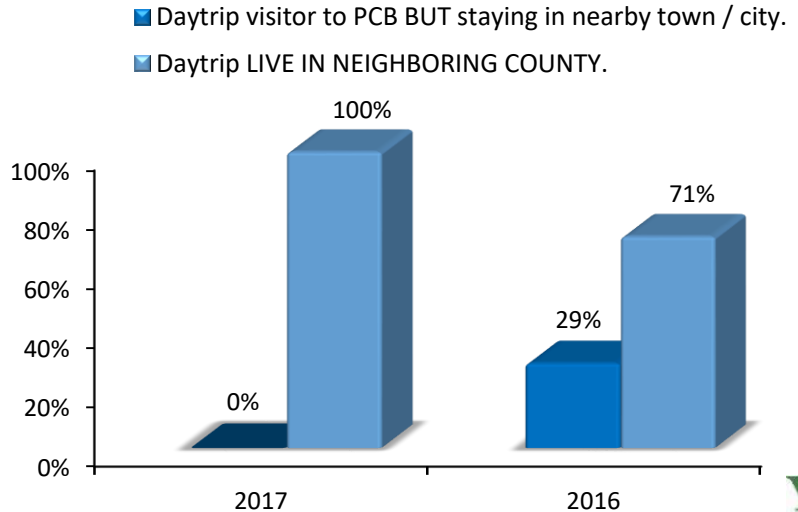
What other attractions/areas did you/someone in your group visit on THIS trip to PCB? n=119



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



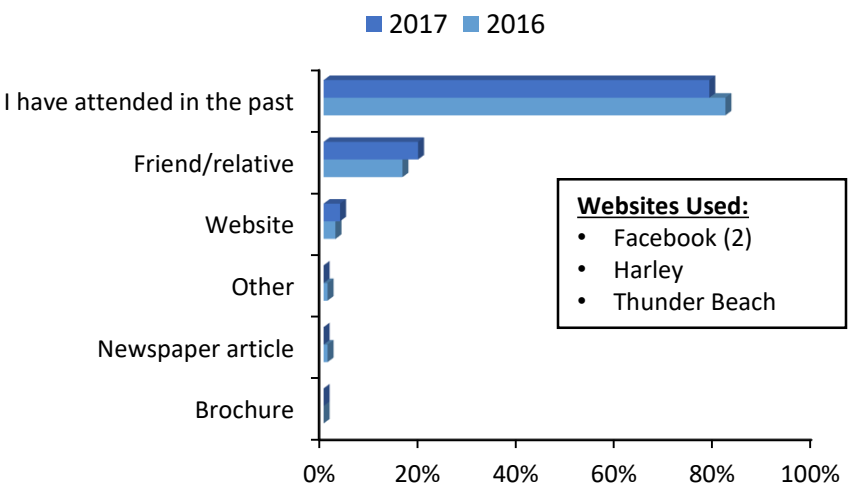
Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=14



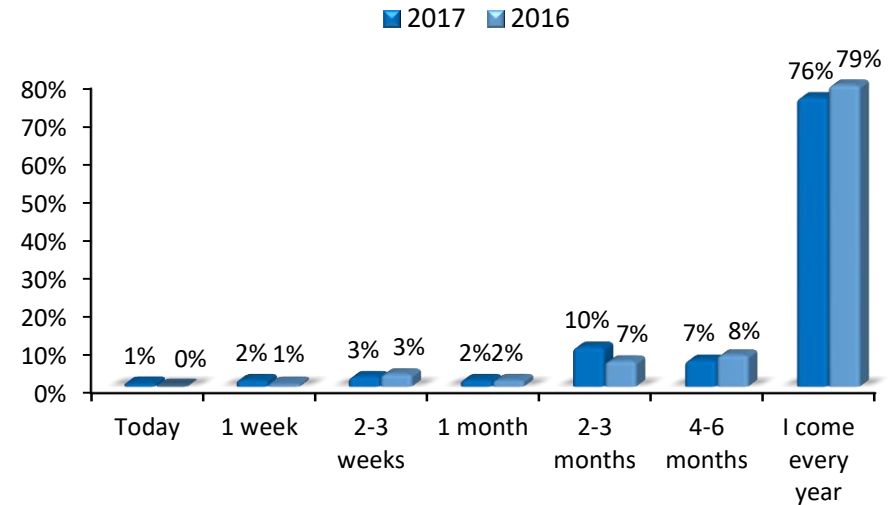
Panama City Beach Convention and Visitors Bureau Thunder Beach Spring Rally

Trip Planning and Purpose

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

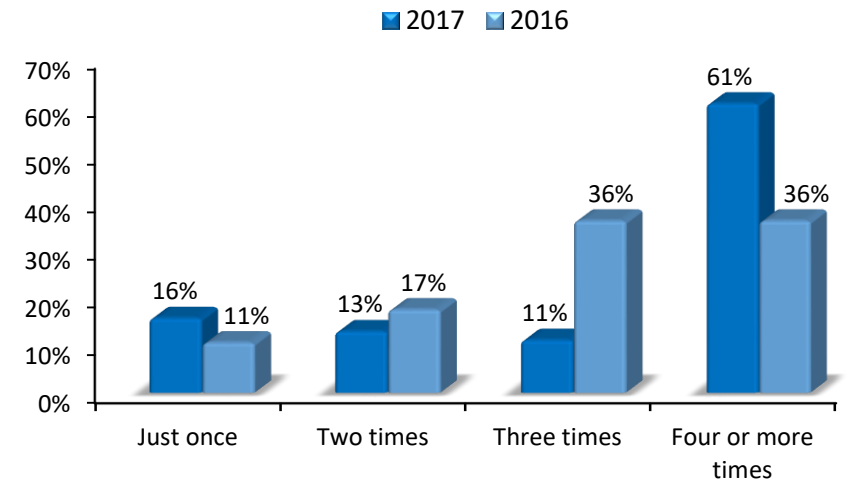


How far in advance did you plan to attend this festival/event? n=116

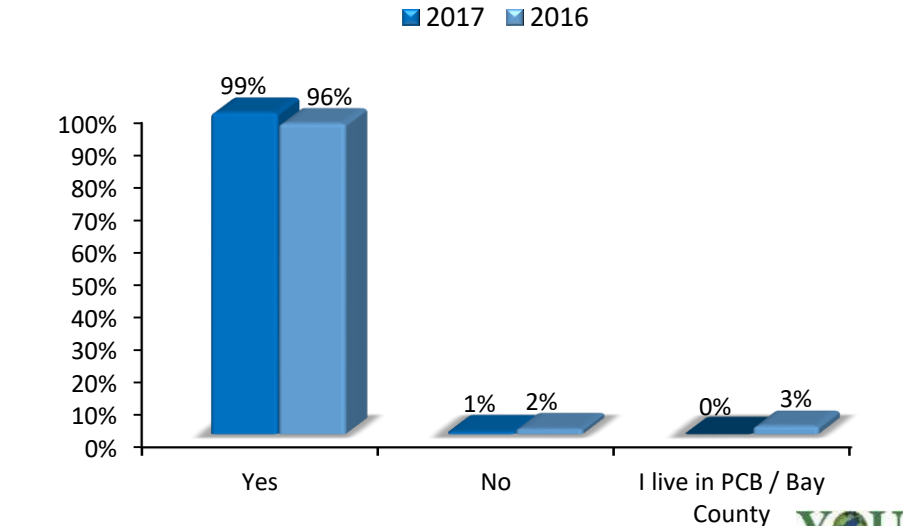


How many times will you or your group attend the festival this week?

n=109



Was attending this festival your primary purpose for visiting Panama City Beach? n=111

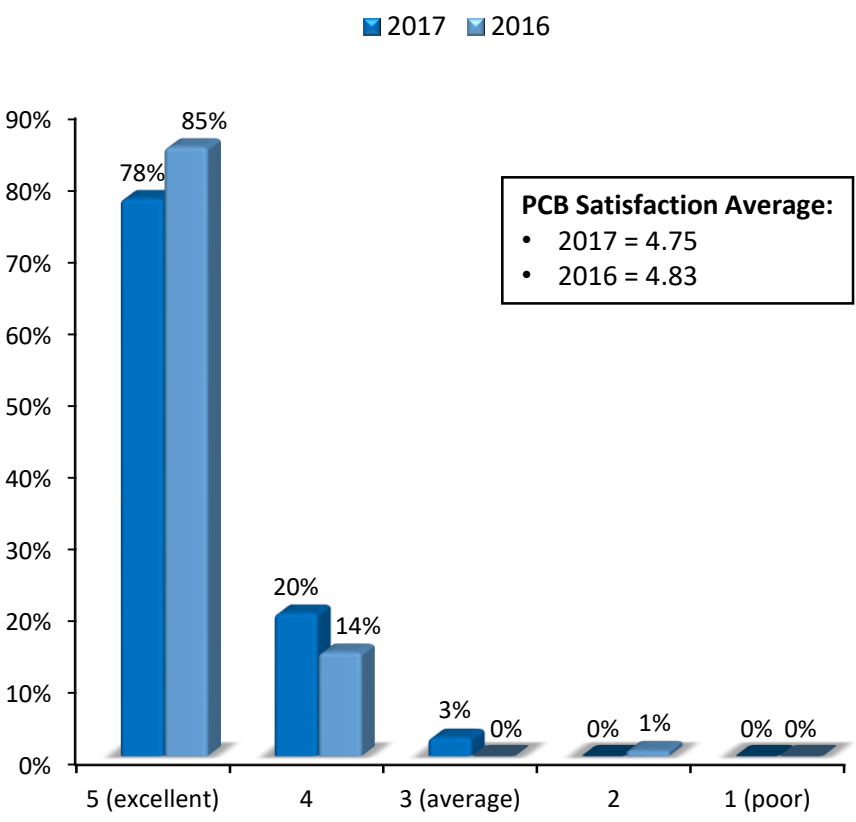


Panama City Beach Convention and Visitors Bureau

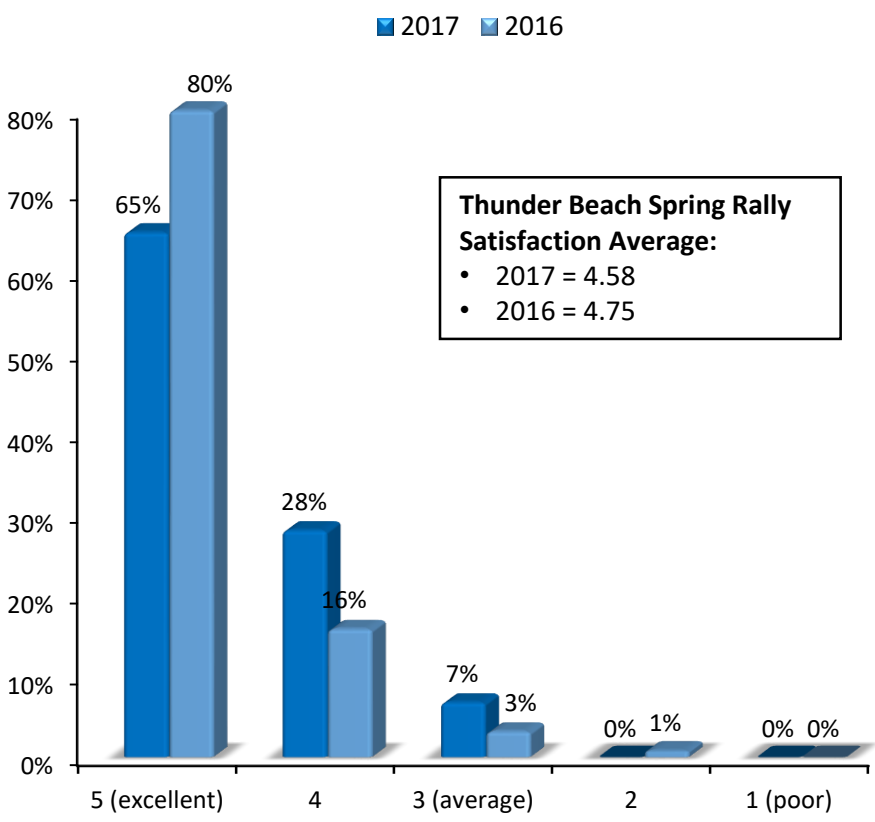
Thunder Beach Spring Rally

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=116



Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to the Thunder Beach Spring Rally? n=117



Observations:

- Overall trip satisfaction to Panama City Beach was slightly lower in 2017 at 4.75 compared to the 2016 rating of 4.83.
- Festival satisfaction rated at a 4.58 on a 5-point scale.

Panama City Beach Convention and Visitors Bureau

Thunder Beach Spring Rally

Travel PARTY Spending (Total Trip)

Spending Category	2017	2016
Lodging (% of reporting)	\$563.91 (28.3%)	\$669.82 (63.2%)
Dining/Food (% of reporting)	\$349.50 (33.3%)	\$341.08 (74.4%)
Shopping (% of reporting)	\$264.85 (28.3%)	\$277.56 (64.0%)
Bars/Nightclubs (% of reporting)	\$151.32 (15.8%)	\$167.65 (39.2%)
Local Transportation (% of reporting)	\$42.65 (14.2%)	\$56.05 (16.0%)
Tickets/Admissions (% of reporting)	\$200.00 (0.8%)	\$0.00 (0.0%)
Average Total Spending Per Travel Party (% of reporting)	\$1,090.79* (99.2%)	\$1,099.77* (80.0%)
Average total # in Travel Party	6.9	4.4
Average Length of Stay	4.8 nights	3.9 nights

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

Panama City Beach Convention and Visitors Bureau

Thunder Beach Spring Rally

Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

- 1. Need more vendors**
- 2. More bathrooms**
- 3. Traffic**

- Ale
- All good (2)
- Bad info from Thunder Beach org- to club to host
- Better bathrooms- Break up venues, more spread out.
- Better directions to area.
- Better traffic central.
- Cheaper beer and more tables. More staff to serve drinks
- Cheaper prices
- Feels crowded
- Feels smaller.
- More bathrooms (2)
- More bathrooms with hand wash
- More bike vendors
- More food vendors
- More parking- Trailers
- More vendors
- More vendors and more entertainment.
- More vendors at different locations
- More vendors- swap meet-used things
- Roads-holes
- Stay open later
- Traffic
- Unorganized rolling

How can we improve your experience to this festival?

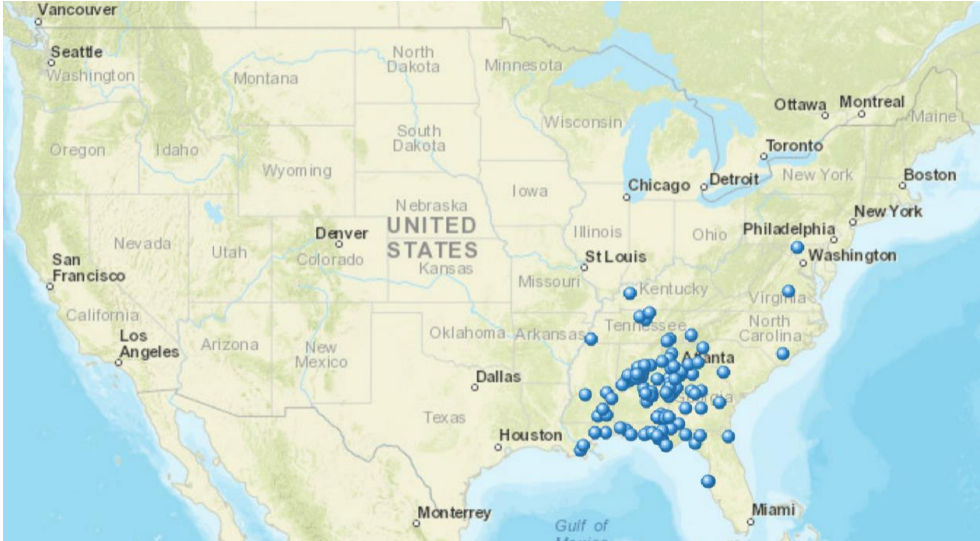
- Add fees charged at condo-bad! Parking fees
- All good
- More big banners- Welcome Bikers
- PBC looking better
- Things were not open on Wednesday.

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

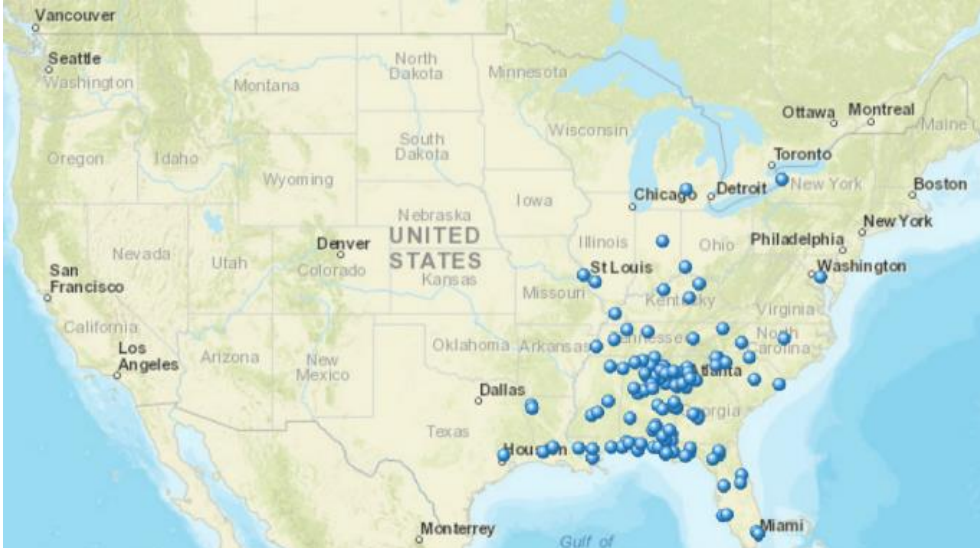
- Chipley
- Columbus GA
- Defuniak Springs
- Destin
- Dewton
- Fort Walton
- Fountian
- Freeport
- Milton
- Navarre Beach
- Niceville (2)
- Port St.Joe
- St.Joe Beach

Panama City Beach Convention and Visitors Bureau Thunder Beach Spring Rally

2017 Respondent Point of Origin



2016 Respondent Point of Origin



State - City	



Jeep Beach Jam

May 17-21, 2017

N=120

Festival Research Methodology Detail:

- The YSI research team attended the festival and conducted the interviews May 17th – May 21th at a random series of locations throughout Frank Brown Park.



Panama City Beach Convention and Visitors Bureau

Jeep Beach Jam

52

Summary of Festival Survey Responses



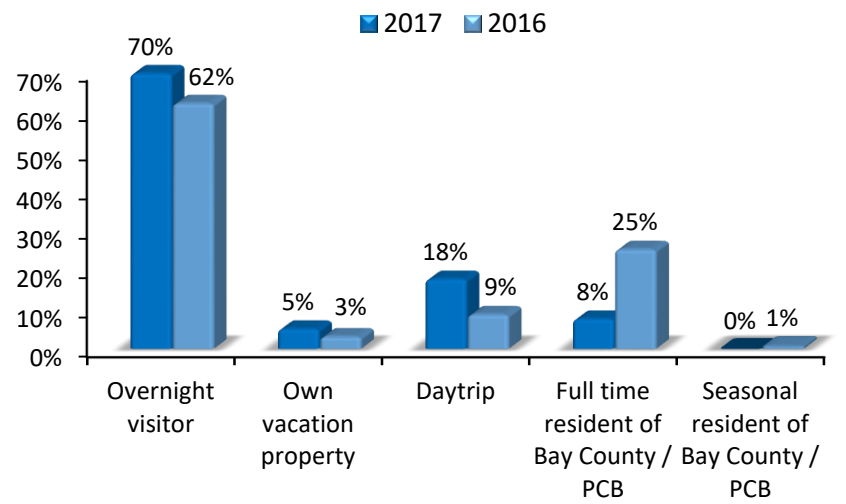
Jeep Beach Jam Festival Reponse Summary

- Respondents were an average age of **45** with the following generational break down (100% of respondents were adults 18+ years of age):
 - **Generation X (29-49) – 47%**
 - **Baby Boomer (50-67) – 40%**
 - **Generation Y (18-28) – 13%**
 - **Silent Generation (69-86) – 0%**
- 41% of respondents were female, and 59% were male.
- **Point-of-origin – Respondents came from 10 states with the largest portion of respondents from Florida (43%), followed by Georgia and then Alabama.**
- **Pre-trip planning – 26% planned their trip 4-6 months in advance, followed by 16% planning 2-3 months prior.**
- Average length of stay in PCB was 4.3 nights compared to 3.6 in 2016.
- Average party size attending the festival was 4.7, with 2 being the most frequent response.
- PCB visit satisfaction rated slightly lower in 2017 at a 4.74 compared to 4.88 in 2016. The overall rating of Jeep Beach Jam this year was 4.46, higher than the 2016 rating of 4.41.
- Average party spending while in PCB: **\$948.82**

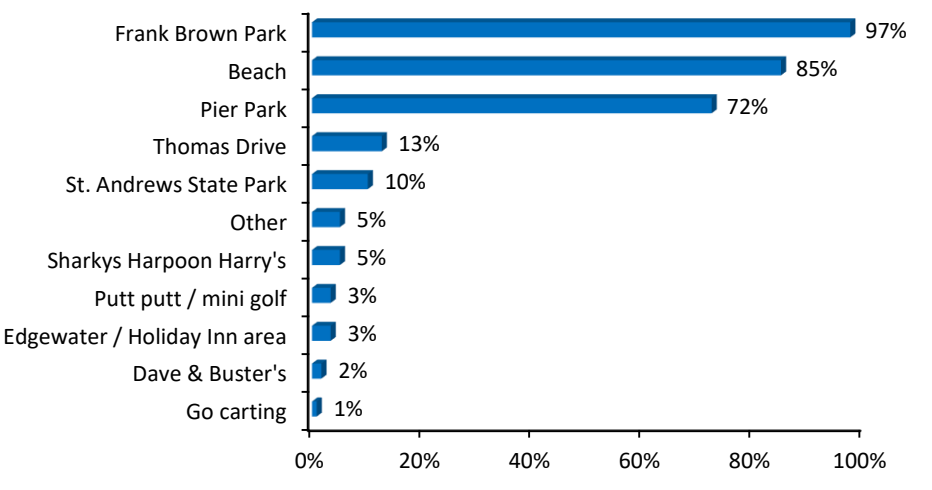
Panama City Beach Convention and Visitors Bureau

Jeep Beach Jam

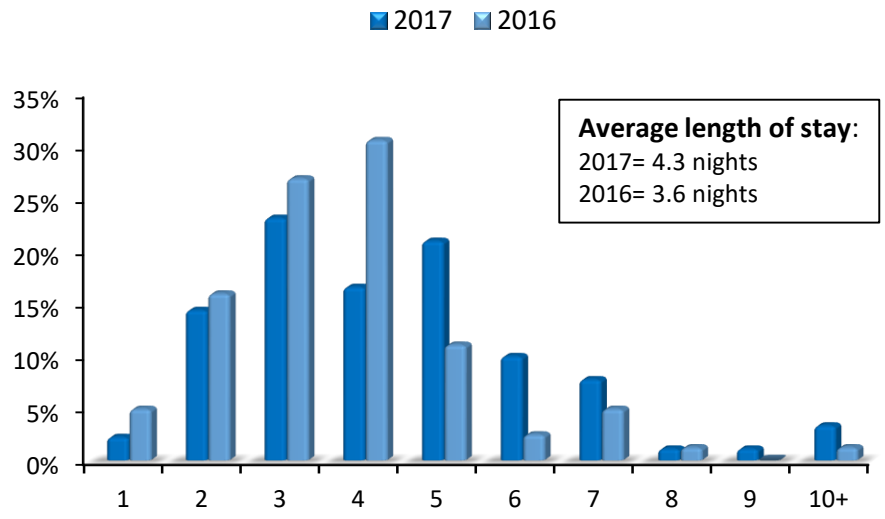
Please select the phrase below that best describes your time spent in Panama City Beach, Florida. n=119



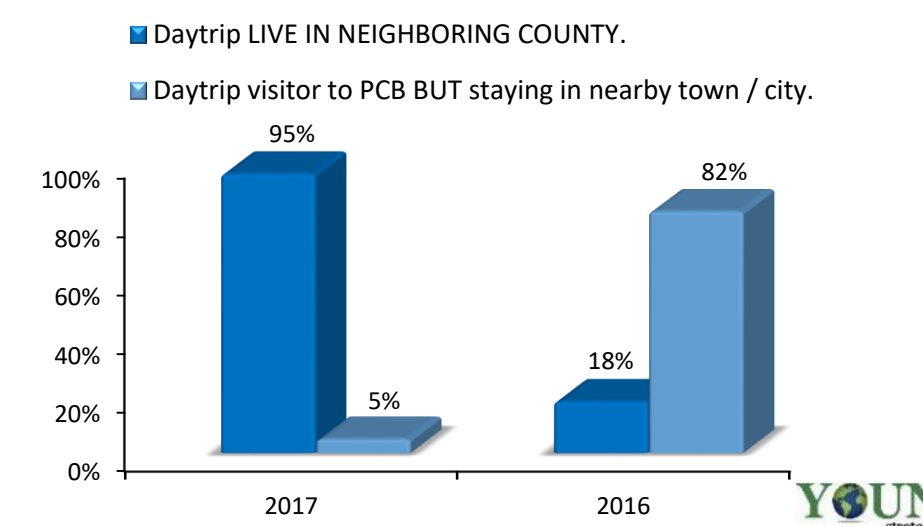
What other attractions/areas did you/someone in your group visit on THIS trip to PCB? n=119



Please specify the number of nights you are staying during this visit to PCB. n=83



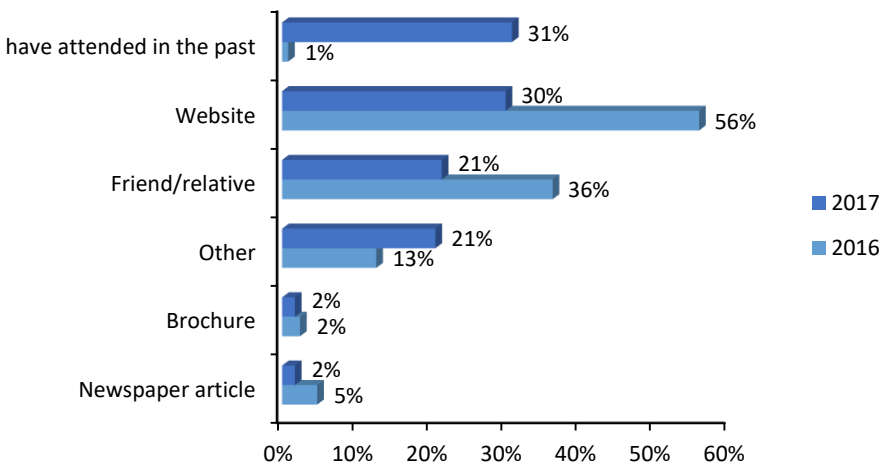
Please tell us if you are a daytripper staying in a nearby town or if you live in a neighboring county. n=20



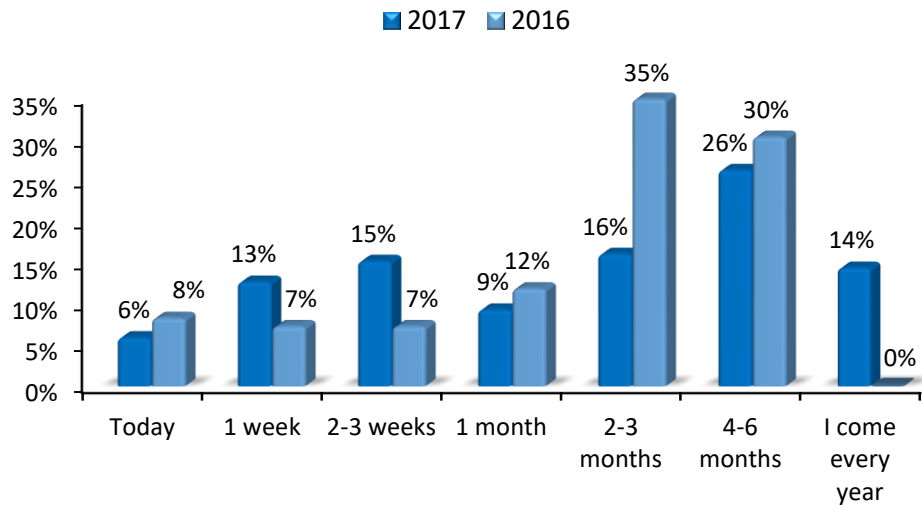
Panama City Beach Convention and Visitors Bureau Jeep Beach Jam

Trip Planning and Purpose

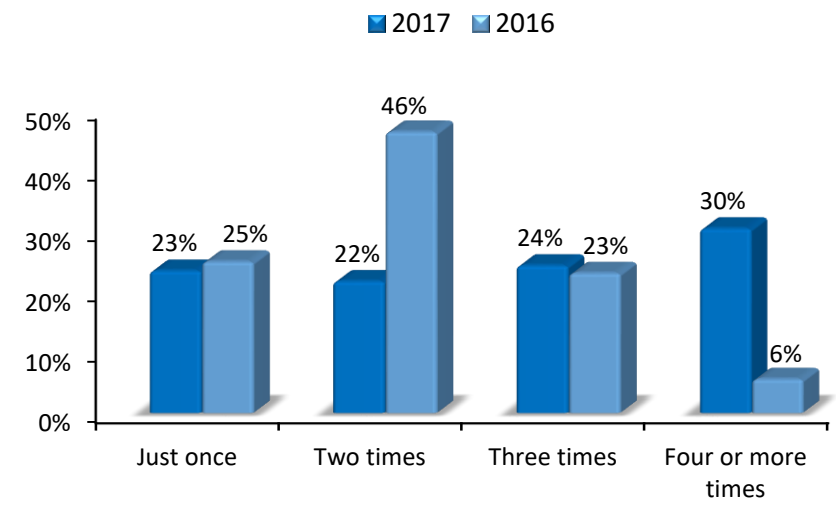
How did you find out about the festival? n=117



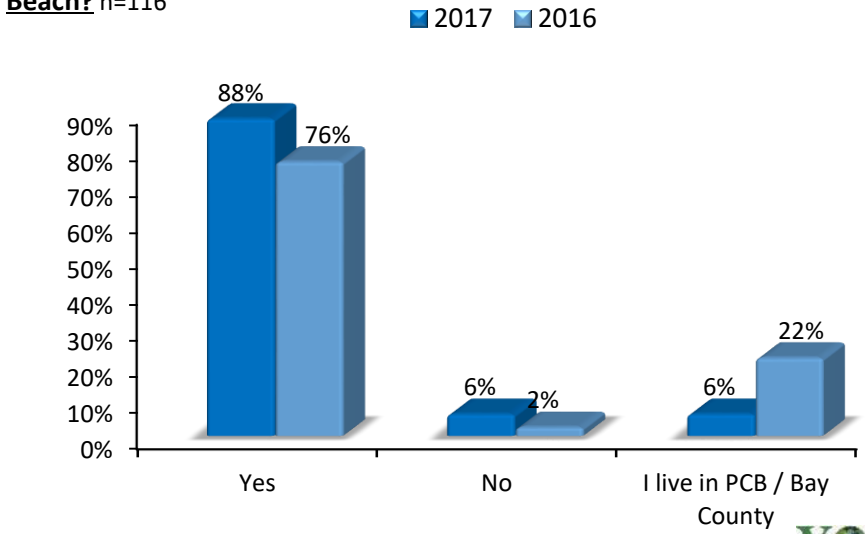
How far in advance did you plan to attend this festival/event? n=118



Did you or your group attend the festival more than once over the entire festival weekend or duration of event? n=115



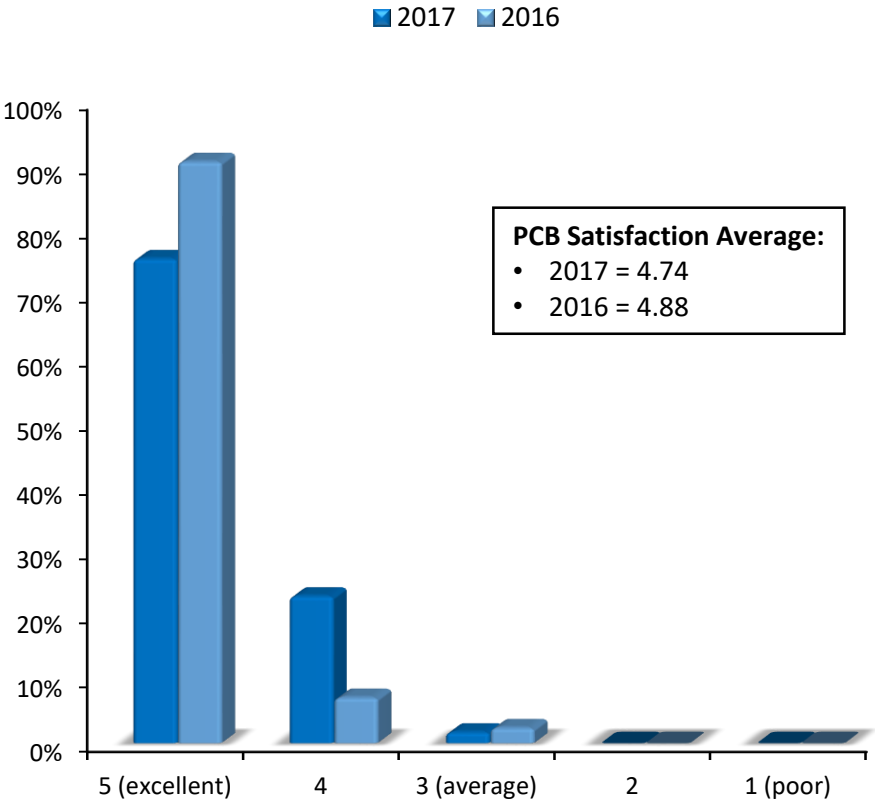
Was attending this festival your primary purpose for visiting Panama City Beach? n=116



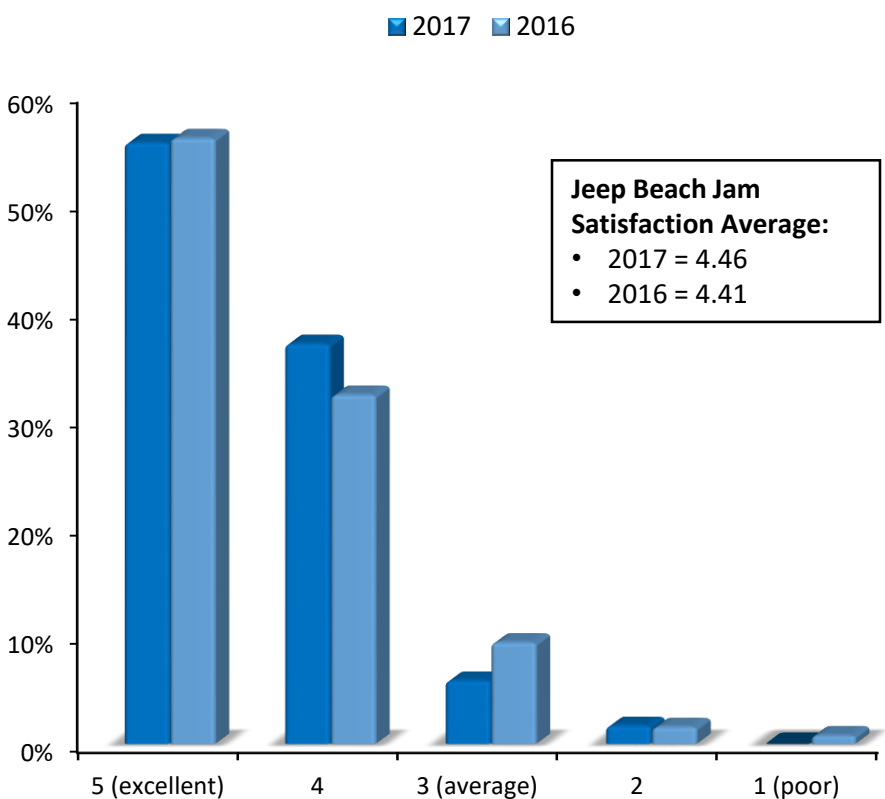
Panama City Beach Convention and Visitors Bureau Jeep Beach Jam

Visitor Satisfaction

Overall, on a 5 point scale (where 1 is poor, 3 is average and 5 is excellent), how would rate your visit to Panama City Beach? n=118



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



Observations:

- Overall trip satisfaction to Panama City Beach dropped to 4.74 from a 4.88, while the festival rated higher in 2017 at 4.46 on a 5-point scale.

Verbatim Comments:

How can we improve your experience to this festival?

Top 3 responses:

- 1. Need more vendors**
- 2. Better organized**
- 3. More signage**

- Advertised bonfire was a no show with event staff.
- Better obstacle course (2)
- Better signs to entrance
- Better signs to entrance/exit. Better obstacle course
- Better signs to see event
- Bigger names for concerts
- Couldn't find bathroom building
- Daytime bands/entertainment. Poker run needs to be organized
- Different bands. Not just country
- Good location, need more events, schedule needs work to much overlap of events
- Have a military discount to get in
- Less country music
- More entertainment. More things to do. Better directions to events
- More events
- More family friendly activities
- More food vendors
- More food vendors, better restrooms
- More jeep events. Events need to start Wednesday as advertised
- More kids stuff
- More kids stuff to do. 10-14 yrs
- More ride trails,better course
- More shade area, misters and fans
- More shade, misters
- More vendors (3)
- More vendors and displays needed
- More vendors for older jeeps
- More vendors to work on jeeps, install parts
- More vendors, 2nd obstacle course
- More vendors, tj parts
- More vendors. Better obstacle course
- More vendors; clothes
- More vendors34
- More womens items,suggestion ro have craft fair booths.Meet and greets need to be better organized. Vendors need to be open if advertised on wed and thur
- Need more local participation
- Need to get better organized
- Needs to be more organized
- Off roading areas
- On site camping. "More show than go"
- On site camping. More vendors
- Parking needs labels
- Poker run not organized
- Registration fees too high, vendors were advertised open on wed,thur but they were not.
- Trail ride
- Trail rides, beach rides
- Vendors not open as advertised. Organized rides needed

Verbatim Comments:

How can we improve your experience in PCB?

- Hard to find itinerary/list of events

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

- Santa Rosa

Daytrip LIVE IN NEIGHBORING COUNTY.

In what town / city do you live?

- Chipley
- Destin
- Dothan (3)
- Florala, Al
- Forteson, Ga
- Ft Rucker
- Ft Walton (2)
- Grandridge
- Madison
- Mexico Beach
- Pensacola (2)
- Plant City
- Port St Joe (2)
- Sanddestin
- Youngtown

How did you find out about the festival?

Other:

- Drove By And Saw Sign
- Email
- Facebook (3)
- Four Wheel Parks
- Jeep Club (11)
- Jeep Events
- Saw Jeeps
- Saw Sign At Sharkeys
- Signs In Resturant
- Tv
- Vendor Info, Scorpion Off Road
- Wjhg Tv

Please tell us what websites you used to find information about the festival:

- Facebook (29)
- Jeep Beach
- Jeep Co Jeep Club (4)
- Jeep Jam (4)
- Pcb (5)
- Wjhg

Panama City Beach Convention and Visitors Bureau Jeep Beach Jam

Travel PARTY Spending (Total Trip)

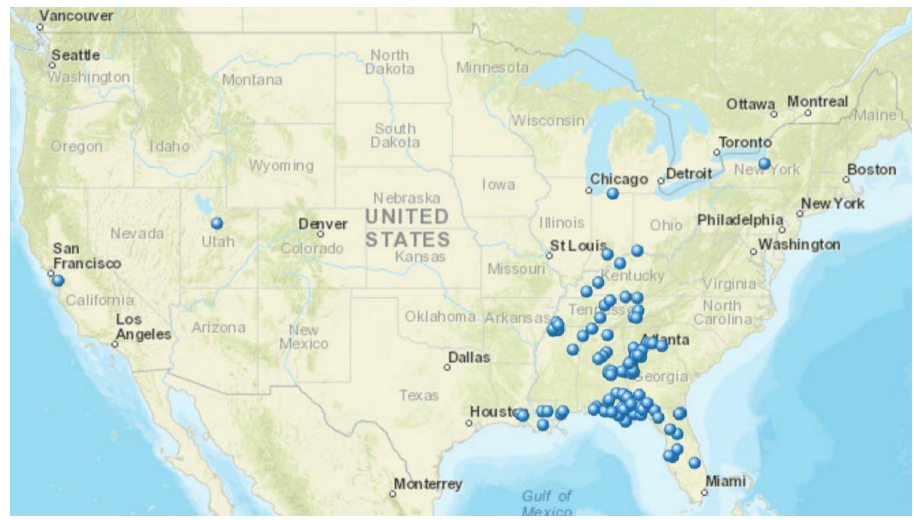
Spending Category	2017	2016
Lodging (% of reporting)	\$663.71 (26.1%)	\$435.42 (51.2%)
Dining/Food (% of reporting)	\$317.64 (44.5%)	\$286.51 (67.7%)
Shopping (% of reporting)	\$328.15 (38.7%)	\$205.35 (55.9%)
Bars/Nightclubs (% of reporting)	\$95.00 (4.2%)	\$358.80 (39.4%)
Local Transportation (% of reporting)	\$49.15 (16.8%)	\$43.48 (19.7%)
Tickets/Admissions (% of reporting)	\$120.00 (0.8%)	\$300.00 (0.8%)
Average Total Spending Per Travel Party (% of reporting)	\$948.82* (97.5%)	\$891.23* (76.4%)
Average total # in Travel Party	4.7	2.8
Average Length of Stay	4.3 nights	3.6 nights



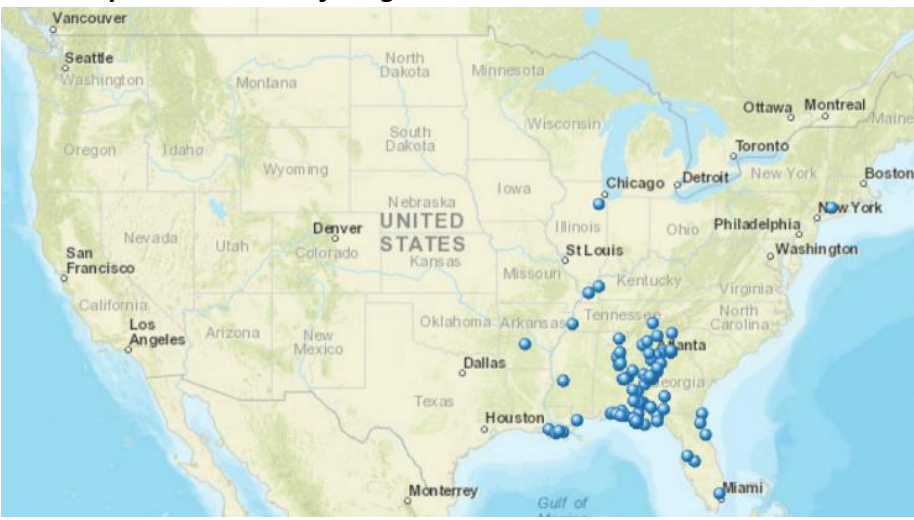
***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of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

Panama City Beach Convention and Visitors Bureau Jeep Beach Jam

2017 Respondent Point of Origin



2016 Respondent Point of Origin



State - City		



Young Strategies, Inc. Research Team Experience

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

Berkeley W. Young, President - Project Team Leader

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

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

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

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

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

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

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