

DESTINATION PANAMA CITY ST. ANDREWS SCHOOL PROPERTY CULTURAL TOURISM OPPORTUNITIES AND RECOMMENDATIONS

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INTRODUCTION

Robin Malpass & Associates (RMA), a destination marketing agency that specializes in cultural, heritage and creative tourism, was contracted by Destination Panama City to research cultural tourism concepts and recommendations for the former St. Andrews School property.



BACKGROUND

In 2015, RMA completed a cultural tourism destination review for the Panama City Tourism Study, which concluded that there was a need for a Destination Marketing Organization to represent Panama City, Florida as a tourism destination.

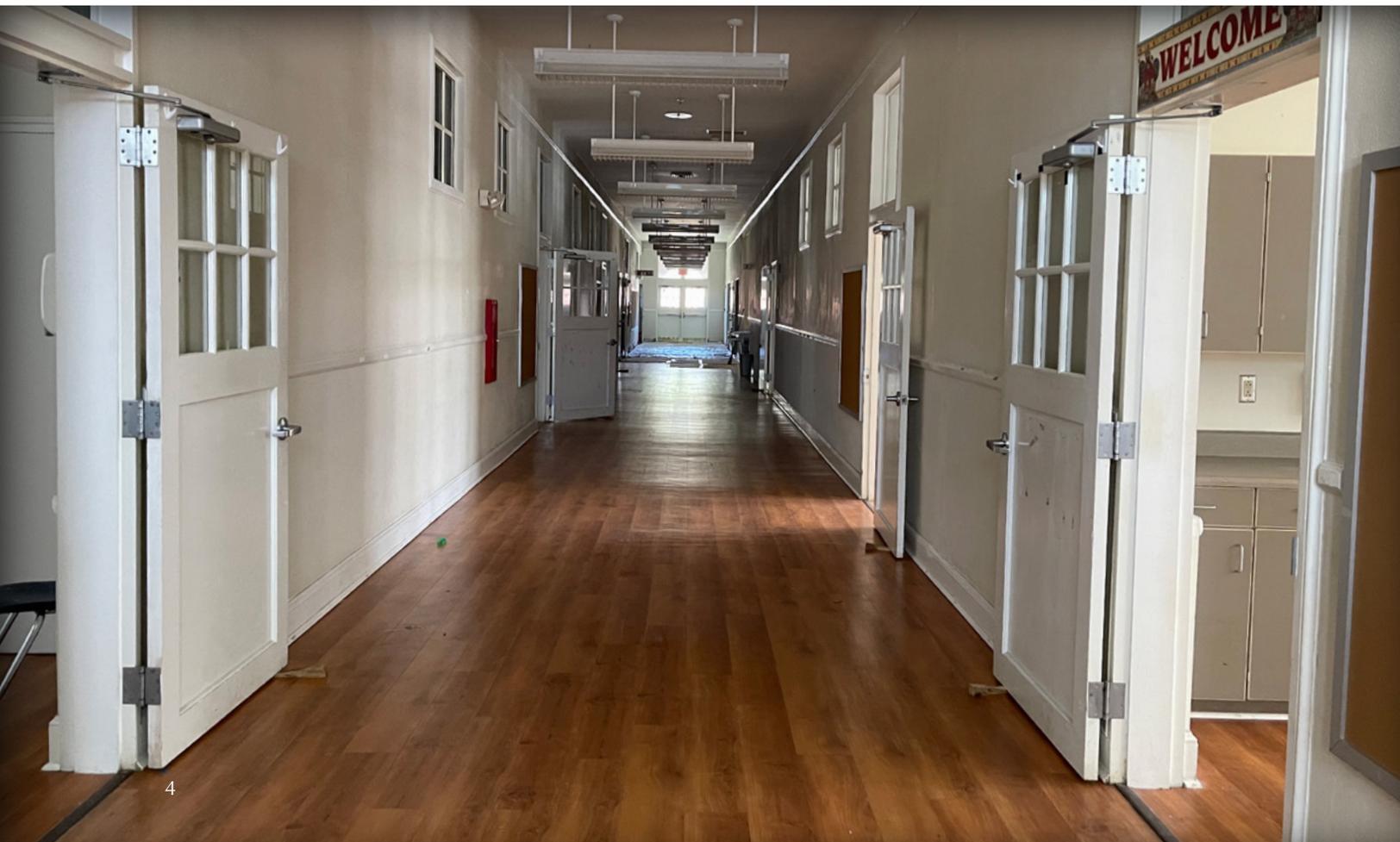
In 2016, RMA was hired as the first marketing agency of record for Destination Panama City under the leadership of President & CEO, Jennifer Vigil. One of our first assignments was to develop a brand promise, capturing the authentic characteristics of the destination. The brand promise was used internally to guide the development of the brand's logomark, theme-line, destination marketing plan and materials.

“Only in Panama City can one experience waterfront access to historic St. Andrew’s Bay, year-round recreational activities and a diverse selection of unique cultural amenities housed within a community that intelligently blends innovation and creativity.”

In 2021, RMA had the opportunity to apply our extensive knowledge of cultural tourism and Panama City to our newest Destination Panama City assignment. Provide cultural tourism concepts and recommendations for the City of Panama City’s consideration when reimagining the best and highest usage for the former St. Andrews School property. It is our belief that the Destination Panama City brand promise is as relevant today as it was in 2016. As a result, our recommendations reflect an intelligent blend of innovation and creativity.

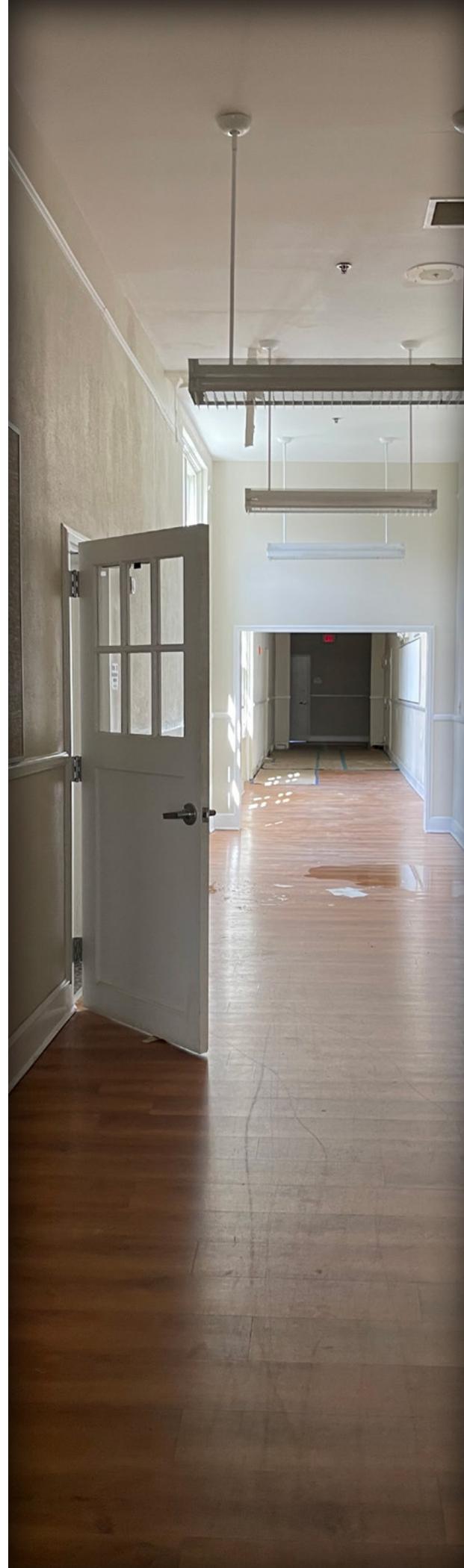
ST. ANDREWS SCHOOL REIMAGINATION GOALS

- Drive increased visitation to the destination - specifically by cultural tourists, as they represent a demographic that stays longer and spends more.
- Maximize cultural experiences that the local community and visitors can participate in equally.
 - Immersive cultural experiences
 - Workshops, retreats, learning facilities
 - Events, festivals, conferences
 - Exhibits, public and performing arts
- Include revenue opportunities to foster self-supporting structure.
 - Workshops
 - Conferences
 - Event space rental
 - Auditorium rental
 - Exhibit fees
 - Sponsors / members
- Foster economic opportunities for local businesses and cultural tourism.
 - Arts & Cultural District/Corridor



THE PROCESS

- Evaluation of existing facilities
- Interview stakeholders
 - City of Panama City
 - Destination Panama City
 - Community Input Sessions (organizations and individuals)
- Identify common shared vision components
 - Enhance opportunities to attract and retain cultural tourists
 - Support local arts and cultural communities
 - Maintain a self-supporting financial structure
 - Preserve architectural structure listed on National Register of Historic Places
 - Honor history of Bay County's longest continuously operating educational facility



- Perform Art & Cultural SWOT analysis

- **Strengths**

- Panama City is a leader in a cutting-edge art form known as media arts.
 - Panama City is home to experienced media arts professionals.
 - Panama City is host to a long-running annual media arts festival with entries from around the world.
 - Panama City has a successful destination marketing organization experienced at attracting cultural visitors.
 - Panama City has a history of supporting art and cultural programming, such as the highly visual mural program.
 - Panama City has the tourism assets to support the expansion of art and cultural experiences.

- **Weaknesses**

- Panama City has a number of arts and cultural organizations, but none provide an over-arching, unique cultural identity for the destination.
 - Panama City is currently lacking space for new and existing cultural organizations to gather and perform due to Hurricane Michael.
 - Panama City's arts and cultural venues and experiences are scattered throughout the destination with no core nucleus.





- Opportunities

- Leverage cutting-edge arts and culture expertise by expanding and diversifying media arts programming from once a year to year-round experiences.
- Maximize the interior and exterior spaces of the St. Andrews School property to incorporate multiple art and cultural venues for a variety of uses.
- Establish an arts and culture district to elevate Panama City's identity as a cultural destination and to connect the arts and cultural community into an experience greater than an individual entity.
- Capitalize on Panama City's leading role as one of the world's early adopters of new technologies revolutionizing art as an immersive, interactive experience.
- Take advantage of Florida's commanding reputation in media arts education as one of the top states for media arts studies and graduate programs.

- Threats

- Adopting a reuse plan for the St. Andrews School property that has no clear-cut identity and is designed to support a hodge-podge of interests.
- Lacking forward-thinking vision to create a facility that will position Panama City as a leader in art, technology, innovation, and creativity.
- Forfeiting Panama City's current position as a leader in one of the world's most innovative art forms.
- Missing out on the growing interest in immersive art experiences.

BENEFITS OF A MEDIA ARTS CENTER

Immersive Art Experiences – Enables audiences to see, hear, touch, interact and share art and cultural experience like never before. This new art form has the power to attract new audiences beyond the current art and cultural enthusiasts. Museums and galleries around the world are incorporating innovation and technology to increase interest and accessibility to art.

Eliminate Traditional Art Handling Issues – Media arts transform access to traditional art forms without the expense of transporting, hanging, protecting, and storing physical objects of art. They allow for multiple, diverse art experiences with virtually no downtime between exhibits.

Enhance Traditional Art & Performance Experiences – A Media Arts Center provides an enhanced environment to showcase traditional art and cultural experiences. For example, an auditorium equipped with media arts’ technologies can support music and performance art with stunning visuals and enhanced audio capabilities. It can make a Ted Talk come alive with an interactive video wall or transform a historical presentation into an engaging immersive experience.

Exposure to New Career Paths – A Media Arts Center provides an opportunity for Panama City residents of all ages to experiment and learn about new digital technologies required for a myriad of expanding digital industries, thus opening up new career paths and employment opportunities. From kid camps to workshops with leading global experts, the educational component of a Media Arts Center is unlimited in its capacity to serve locals and visitors.

Attract New Audiences – Creative Tourism is a sub-form of Cultural Tourism that was introduced in 2000 by Greg Richards and Crispin Raymond. They defined it as “tourism which offers visitors the opportunity to develop their creative potential through active participation in experiences which are characteristic of the destination.”

In 2004, UNESCO recognized this new form of tourism by launching the Creative Cities Network. Today, this is a thriving cultural tourism segment that can be found around the world. The St. Andrews School property provides an opportunity for Destination Panama City to more fully engage in this new tourism market segment.

Currently, there are 17 UNESCO Creative Cities of Media Arts around the world. Currently, Austin, Texas is the only U.S. City representing the United States in this elite group of cities employing art, innovation, technology, and creativity to enhance their identities.



Cultural / Creative Tourism Visitor Profile – The cultural/creative tourism visitor is a highly sought-after demographic by destinations around the world.

- Spends more than any other type of visitor - on average 60% more
- Travels more often and stays longer – on average they take 3.6 trips per year
- 41% of cultural visitors are affluent and well-educated baby boomers
- 40% of baby boomer cultural visitors will pay more for distinctive lodging and engage in local immersive experiences
- Millennials are a growth market – 73% desire engagement with the arts, cultural and heritage tourism
- Two-thirds of millennials rated “authenticity” as extremely important in their travel decisions
(Source: National Trust for Historic Preservation)

Unique Events Venue – A Media Arts Center provides Panama City with a unique event venue that can be visually transformed to fit any occasion through digital means. This is a competitive advantage that few destinations can compete against to secure contracts for corporate and social meetings and events. By incorporating the media arts concept throughout the St. Andrews School property, the outdoor space becomes an extension of the interior to host larger events.

Panama City residents will love having an exciting new customizable venue to celebrate special events and occasions.

Preserves Architectural Structure – A Media Arts Center can seamlessly occupy the existing St. Andrews School property with minor modifications to the existing structure. The juxtaposition of a 1926 Mediterranean Revival Style building housing a state-of-the-art Media Arts Center adds a second layer of cultural attraction to appeal to visitors and residents.

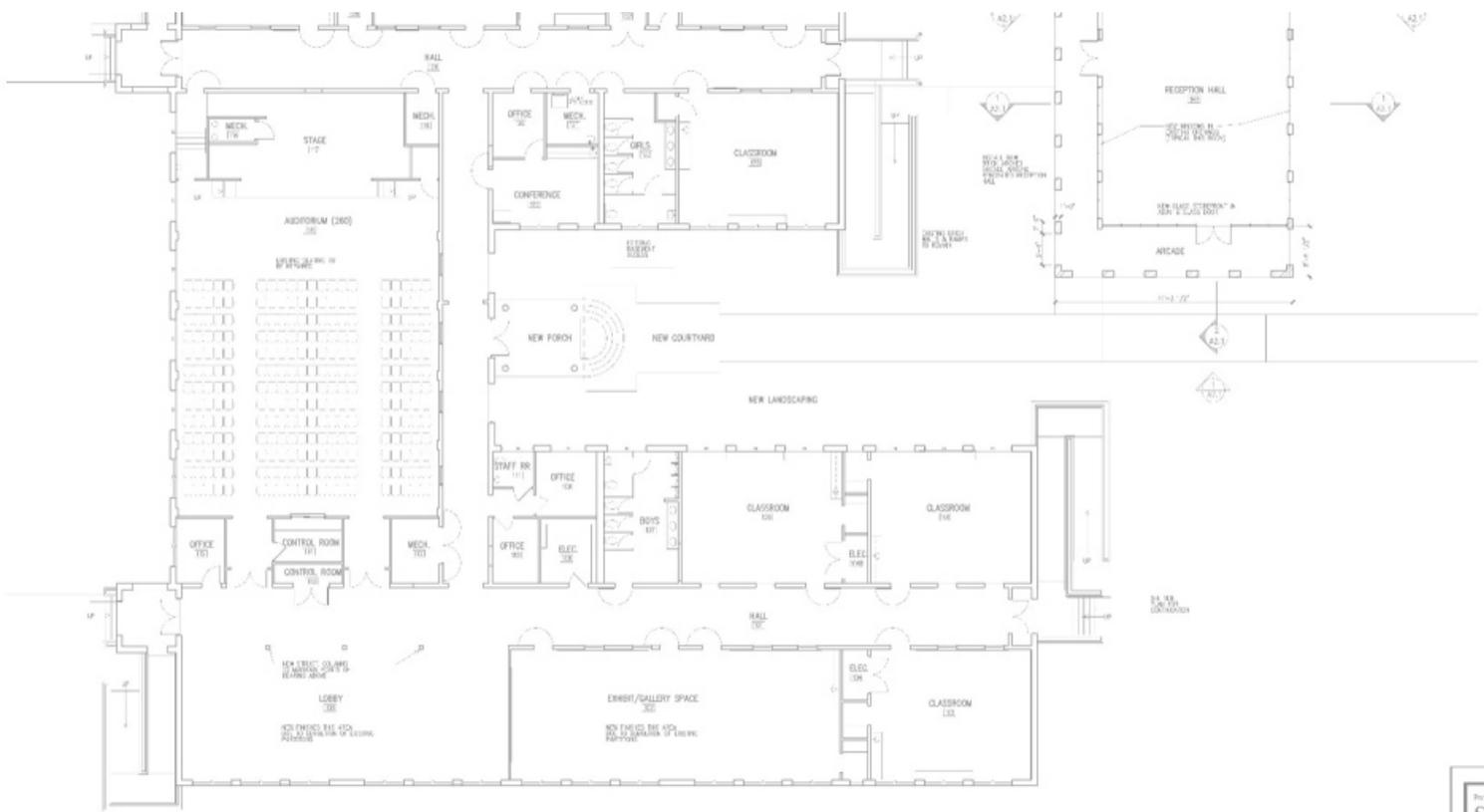


ST. ANDREWS MEDIA ARTS CENTER PLAN

OVERVIEW

This presentation outlines some possibilities for the St. Andrews School facility. A few points should be stated for clarity and understanding.

- Due to supply chain issues, market demand and manufacturing interruptions, projectors in particular and technology items in general are not only delayed for delivery, but they are also fluctuating wildly in cost and availability. Labor and skilled workers may also contribute to unpredictable increases in costs and installation timelines.
- All estimates contained in this document are non-binding, non-guaranteed estimates.
- Project estimates include industry averages for equipment and include labor costs for installation. Equipment brands and models would be determined if a contracted estimate is requested.
- All projects will require considerable power requirements throughout the building and robust internet capabilities.
- Cost of a sculpture for outside projection mapping not included in this estimate.



New Work Floor Plan
7/27/22 1/28-1/3

Project
St. Andrew
School
Renovation Project
Phase 1 - 1st Floor
Date:
10-14-21
Project No.:

MAIN EXHIBIT/GALLERY SPACE



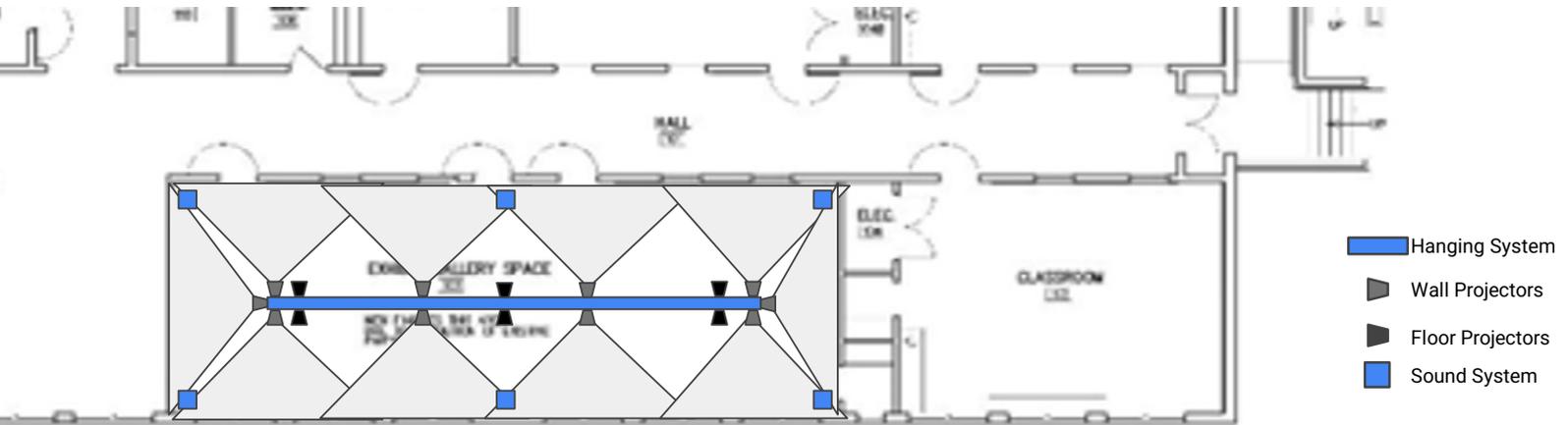
OVERVIEW: MAIN EXHIBIT/GALLERY SPACE

Outfitted with projectors to cover the walls from floor to ceiling and with the addition of floor accent projectors, the Exhibit/Gallery Space lends itself to the creation of an immersive space. Preparing the room by painting the ceiling black, installing a polished floor covering and installing light blocking window coverings converts the space into an expansive digital canvas ready to delight visitors. Everything from fantastical landscapes to interactive and reactive installations are possible.



EQUIPMENT OVERVIEW: MAIN EXHIBIT/GALLERY SPACE

This space is 57'9" long and 22' wide with 12' ceilings. Because of the short distance between the walls and projector mounts, short throw lenses will be required.



Estimated Equipment List:

- 10 Projectors for wall - floor to ceiling coverage
- 6 Projectors for floor accents
- 2-4 computers plus hardware upgrades
- Software for projection mapping
- Sound system
- Window covering system to block light
- Other things to consider - wall mountable screens for displaying digital art in a "frame"

Estimated Cost for Installation: \$150,000



SMALL EXHIBIT/GALLERY SPACE



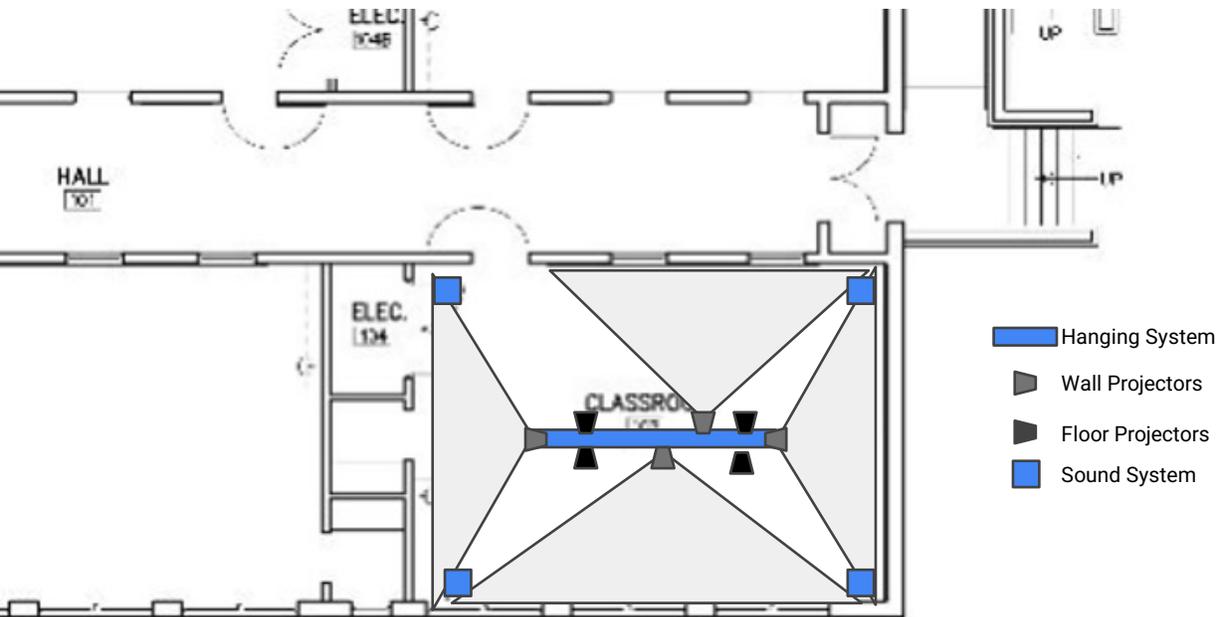
OVERVIEW: SMALL EXHIBIT/GALLERY SPACE

Classroom #103, which is just west of the Main Exhibit/Gallery space, presents an opportunity for a variety of smaller installations from the classic gallery set up to an intimate extension of the main immersive exhibit space or some combination of the two. And, because of its smaller footprint, this exhibit space could also support interactive components or family activities to complement the Main Exhibit/Gallery.



EQUIPMENT OVERVIEW: SMALL EXHIBIT/GALLERY SPACE

This space is approximately 28' long and 22' wide with 12' ceilings. Because of the short distance between the walls and projector mounts, short throw lenses will be required.



EQUIPMENT LIST: SMALL EXHIBITION SPACE

Estimated Equipment List:

- 4 Projectors for wall - floor to ceiling coverage
- 4 Projectors for floor accents
- 1-2 computers plus hardware upgrades
- Software for projection mapping
- Sound system
- Window covering system to block light
- Door between the main and small space with light blocking option

Estimated Cost for Installation: \$80,000

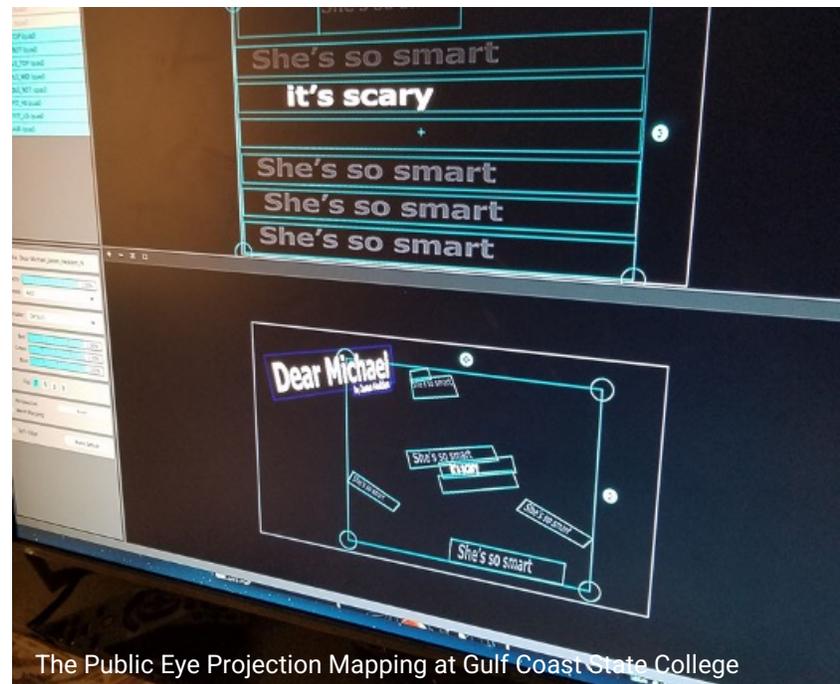


DIGITAL ARTS WORKROOM



OVERVIEW: DIGITAL ARTS WORKROOM

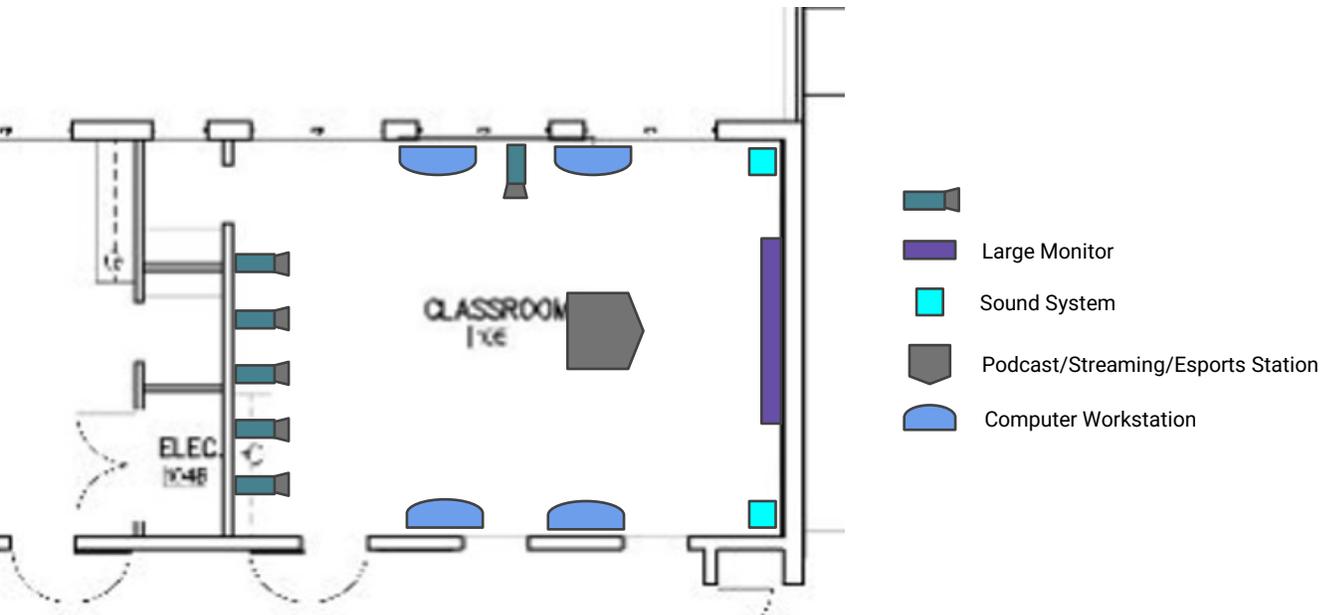
Classroom #105, across the hall from the exhibition area, invites digital artists to create graphics, video and soundscapes ready for testing, sharing and finalizing. Equipped with workstations, monitors, a small recording studio and 5G connection, the Digital Arts Workroom is set for technical classes, conference breakout sessions, podcasts, live streaming and esports. Mobile projector options make this space a projection mapping playground.



The Public Eye Projection Mapping at Gulf Coast State College

EQUIPMENT OVERVIEW: DIGITAL ARTS WORKROOM

This space is approximately 24' long and 22' wide with 12' ceilings.

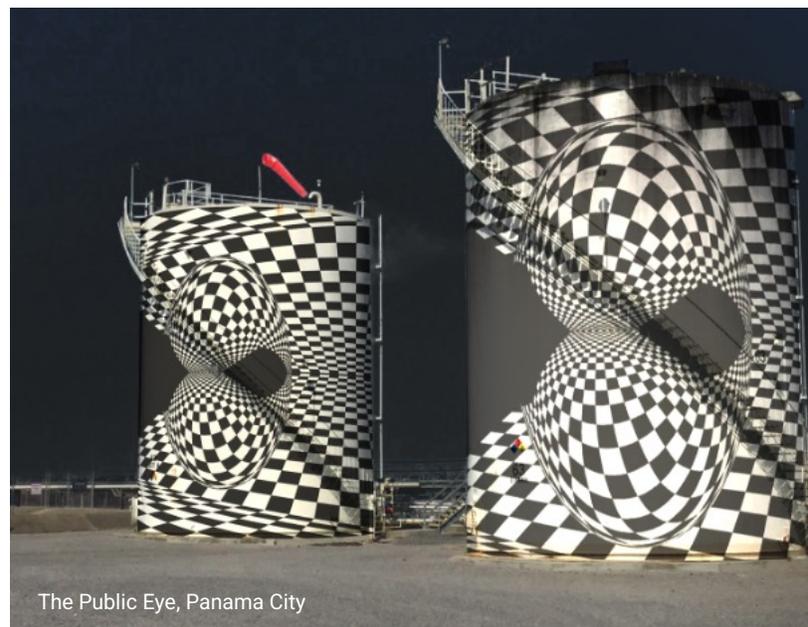


EQUIPMENT LIST: DIGITAL ARTS WORKROOM

Estimated Equipment List:

- 6 Mobile Projector Units
- 1 Mobile computer plus hardware upgrades
- 5 computers plus hardware upgrades
- Software for podcasting, projection mapping, streaming, video editing, sound editing
- Sound system
- Window covering system to block light
- Furniture to accommodate equipment

Estimated Cost for Installation: \$150,000



The Public Eye, Panama City

ART-A-TORIUM

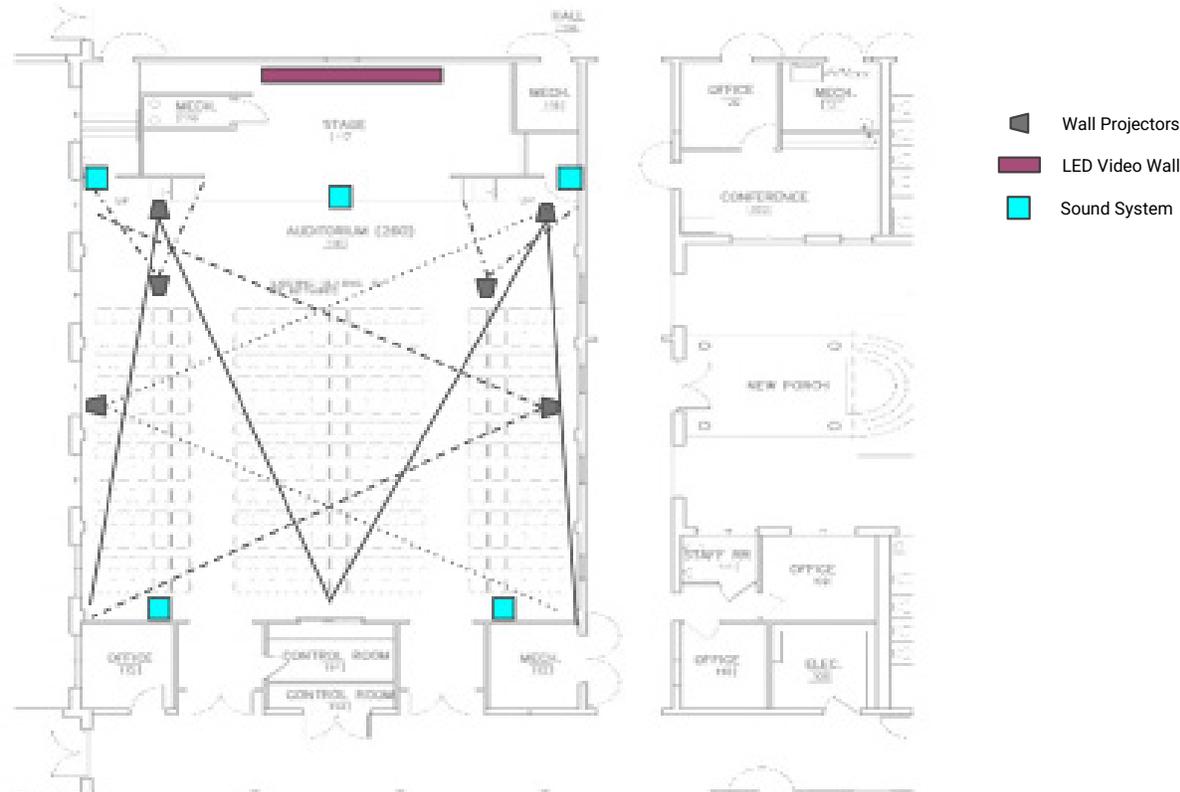


OVERVIEW: ART-A-TORIUM

As a venue, the Art-a-torium stage provides a versatile opportunity for music, lecture and small dramatic presentation. A video wall on stage would allow for quick change sets, easy presentations and enhancing backdrops. The seating space is also a prime immersive opportunity transformed with projection mapping. Special presentations and holidays would be a focal point for mapping in the Art-a-torium.

EQUIPMENT OVERVIEW: ART-A-TORIUM

This space is approximately 19'7" tall by the stage and 17'5" tall by the tech booth. It is 57' across in the audience area.



EQUIPMENT LIST: ART-A-TORIUM

Estimated Equipment List:

- 6 Projectors for wall - floor to ceiling coverage
- 2 computers plus hardware upgrades for LED wall (1) and projection mapping (1)
- Software for projection mapping
- LED Video Wall (approx 20' x 11.25')
- Sound system
- Window covering system to block light

Estimated Cost for Installation: \$400,000



The Public Eye, Panama City Beach

COURTYARD/OUTSIDE AREAS



OVERVIEW: COURTYARD/OUTSIDE AREAS

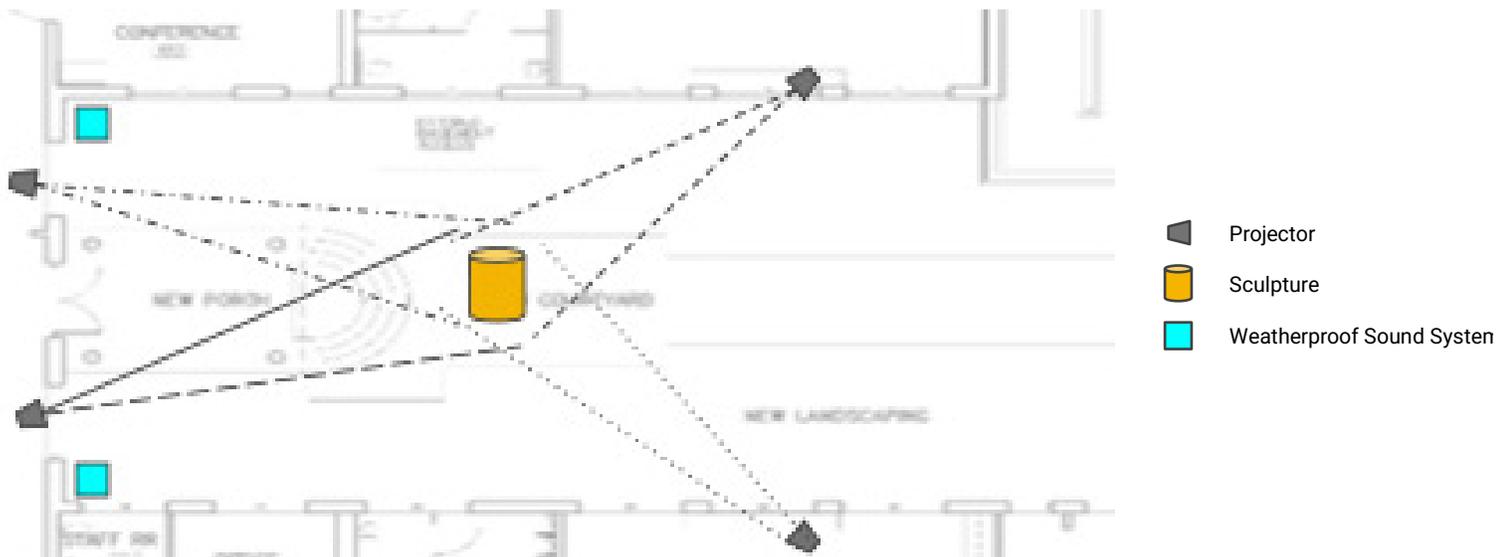
A white or pale pastel sculpture feature in the courtyard would not only provide a beautiful focal point for this area during the day, it would shine at night as a permanently projection mapped object.

While centered on the market area, a touch free, interactive LED light playground incorporating the landscaping adds nighttime play for children and adults. With a wave of your hand, color and motion bring the grounds alive.



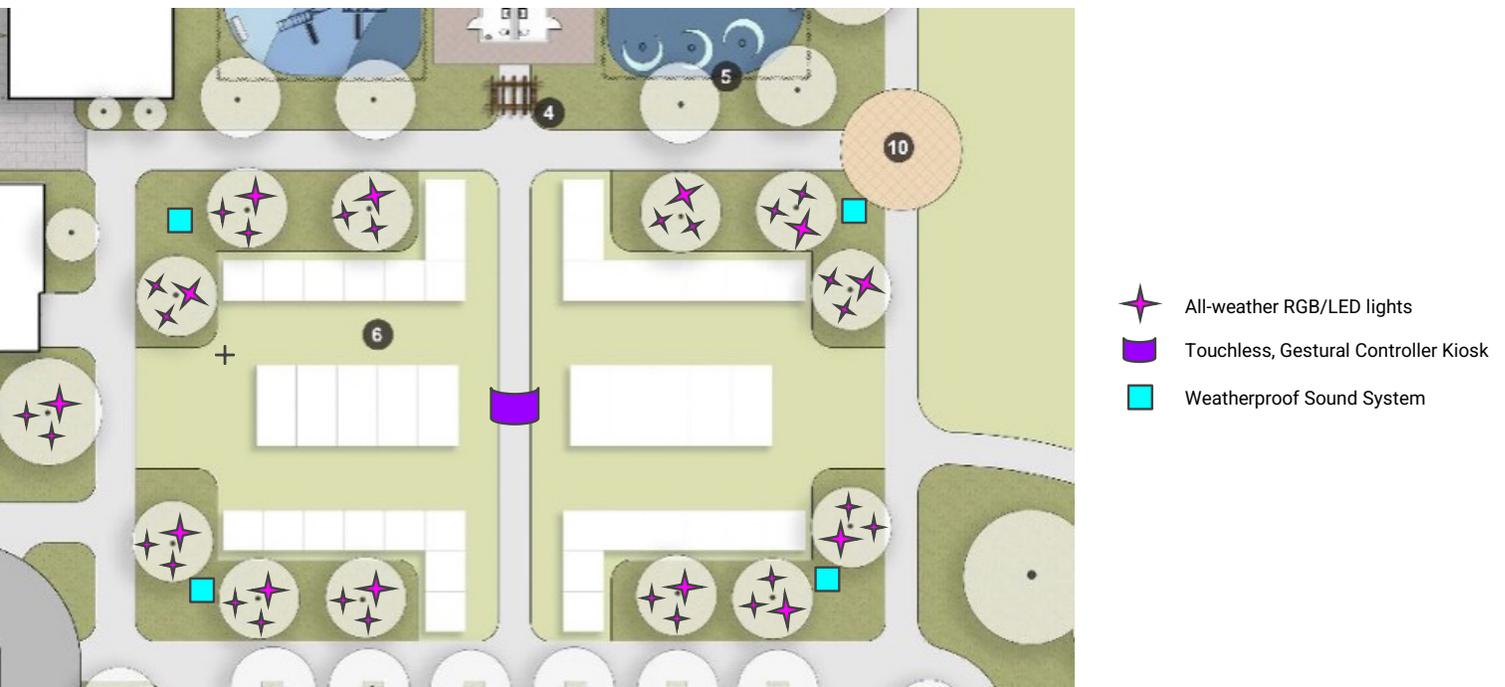
EQUIPMENT OVERVIEW: COURTYARD

Ideally all the projectors would be mounted inside the building above head height, eliminating the need for weatherized, climate controlled and secured projector housings. The arrangement of projectors will depend solely on the sculpture design itself.



EQUIPMENT OVERVIEW: OUTSIDE AREA

Strands of all-weather RGB/LED lights strung throughout the grounds are visitor directed through a touchless, gestural controller located in the center of the market area. The visual effect can be controlled by a visitor's interaction or when not actively engaged, revert to a preprogrammed sequence. During holidays and special events, the system could be programmed to certain colors, coordinated to music selections or triggered by sound input such as live music.



EQUIPMENT LIST: COURTYARD/OUTSIDE AREAS

Estimated Equipment List:

- 4 Projectors
- All Weather RGB/LED strands
- 1 Kiosk for controller
- Controller Hardware and Software
- 2 Computers plus hardware upgrades
- 2 Weatherproof sound systems

Estimated Cost for Installation: \$130,000



ADDITIONAL IDEAS & CONSIDERATIONS

Ongoing Cost considerations:

- Content commissioned for all areas will be an added expense over the installation costs.
- Staffing for Media Arts Center will need a dedicated Digital Arts professional who can provide technical support for all of the technology on site and a staff member who is fluent in the art of projection mapping.
- Marketing and advertising costs to reach outside markets - this type of entertainment can draw international audiences.

Additional ideas:

- Monitors outside every room to provide information to visitors, students and staff about what is happening within that space and throughout the building.
- Conference style projectors, laptop docking stations and video conferencing capabilities in at least a few of the offices/classroom.
- Add a professional lighting system to the stage area with moving light capability.
- Consider adding a white opaque curtain to the front of the stage to complete the immersive experience within the space
- Explore the possibility of partnering with an already established Digital Arts Educational Institution as a satellite location.

ST. ANDREWS MEDIA ARTS CENTER FACILITY ESTIMATE

\$910,000

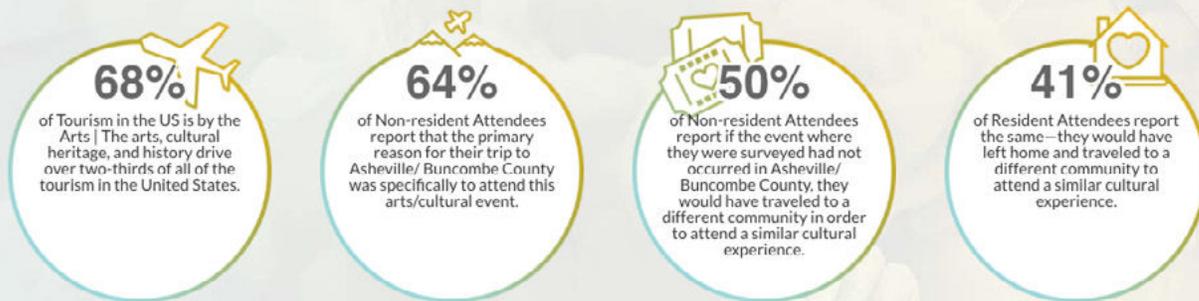


MEDIA ARTS CENTER ORGANIZATION AND STAFF RECOMMENDATIONS

We recommend the Media Arts Center obtain a non-profit organizational status to expand opportunities for funding through grants and donations.

NON-PROFIT CULTURAL ARTS DRIVE TOURISM

Buncombe County is one of 341 study regions that participated in the [Americans for the Arts' Arts & Economic Prosperity 5 study](#), which is the most comprehensive study of its kind ever conducted. The study documents the economic impact of the nonprofit arts and culture sector in 228 cities and counties, 81 multi-city or multi-county regions, 20 states, and 121 individual arts districts—representing all 50 U.S. states and the District of Columbia. The findings show that locally and nationally the arts are a strong driver of tourism!



The report also shows that Non-profit arts and culture organizations spend \$26.4 million annually, leverage a remarkable \$42.5 million in additional spending by arts and culture audiences – spending that pumps vital revenue into local restaurants, hotels, retail stores, and other businesses. Supporting arts and culture not only enhances our quality of life, but also invests in Buncombe County's economic well-being!

[Read more about Buncombe County's arts non-profits Impact here:](#)

[Read the full AFTA report on Buncombe County here.](#)

Data reported in 2016 [Arts & Economic Prosperity 5 research study](#) by Americans for the Arts.

The minimum staff required would consist of a Digital Art Director and an Associate Director. According to Salary.com the average salary for a Digital Art Director is \$102,760 and a digital art associate is \$57,250. Additional staffing may include a program coordinator with an average salary of \$47,775 and a events manager who typically earns \$54,275. It may be possible to secure an agreement with an outside event company to manage the event responsibilities.

GRANTS & FUNDING SOURCES

As a non-profit organization, the Media Arts Center may qualify for funding from a variety of sources from both the private and public sectors. Areas of interest may include:

- Art & Culture
- Media Arts
- Digital Technology
- Education
- Performing Arts Innovation
- Preservation /Reuse

We recommend reviewing grant opportunities from the National Endowment for the Humanities, Florida Department of State-Division of Arts and Culture, Thoma Foundation, and Americans for the Arts which acts as a clearinghouse for grant opportunities for arts organizations.



FINAL THOUGHTS

We believe a Media Arts Center in Panama City is the best and highest usage of the St. Andrews School property to adequately meet the reimagination goals:

- Drive increased visitation to the destination - specifically by cultural tourists, as they represent a demographic that stays longer and spends more.
- Maximize cultural experiences that the local community and visitors can participate in equally.
 - Immersive cultural experiences
 - Workshops, retreats, learning facilities
 - Events, festivals, conferences
 - Exhibits, public and performing arts
- Include revenue opportunities to foster self-supporting structure.
 - Workshops
 - Conferences
 - Event space rental
 - Auditorium rental
 - Exhibit fees
 - Sponsors / members
- Foster economic opportunities for local businesses and cultural tourism.
 - Arts & Cultural District/Corridor



A Media Arts Center can be the catalyst to connect cultural experiences throughout Downtown Panama City and St. Andrews by creating a critical mass of art and cultural products. Ranging from immersive digital art to culinary experiences, live music, and visual and performing arts—together they have the potential to form a robust Cultural District or Corridor.

According to a recent American for Arts Cultural Districts Study, a cultural district is a well-recognized, labeled, mixed-use area of a city in which a high concentration of cultural facilities serves as the anchor of attraction. Cultural districts can be found in communities as small as Riverhead, New York (population 8,814) to New York City (7.3 million). Cultural districts boost urban revitalization in many ways:

- Beautify and animate cities
- Provide employment
- Attract residents and tourists to the city
- Complement adjacent businesses
- Enhance property values
- Expand the tax base
- Attract well-educated employees
- Contribute to a creative, innovative environment

The impact of cultural districts is measurable: The arts attract residents and tourists who also support adjacent businesses such as restaurants, lodging, retail, and parking. The presence of the arts enhances property values, the profitability of surrounding businesses and the tax base of the region. The arts attract a well-educated work force—a key incentive for new and relocating businesses. Finally, the arts contribute to the creativity and innovation of a community.

A good example is Tucson. Three years after establishing the Tucson Arts District, 26 of the 112 businesses in the arts district were new, 54% had increased their sales volume, and 53% made renovations, with an average cost of \$105,272 each. Within four years, the retail vacancy rate declined by 50% and city sales tax revenues in the arts district increased 11.7%, compared with a citywide increase of 7.4%.

IN CONCLUSION

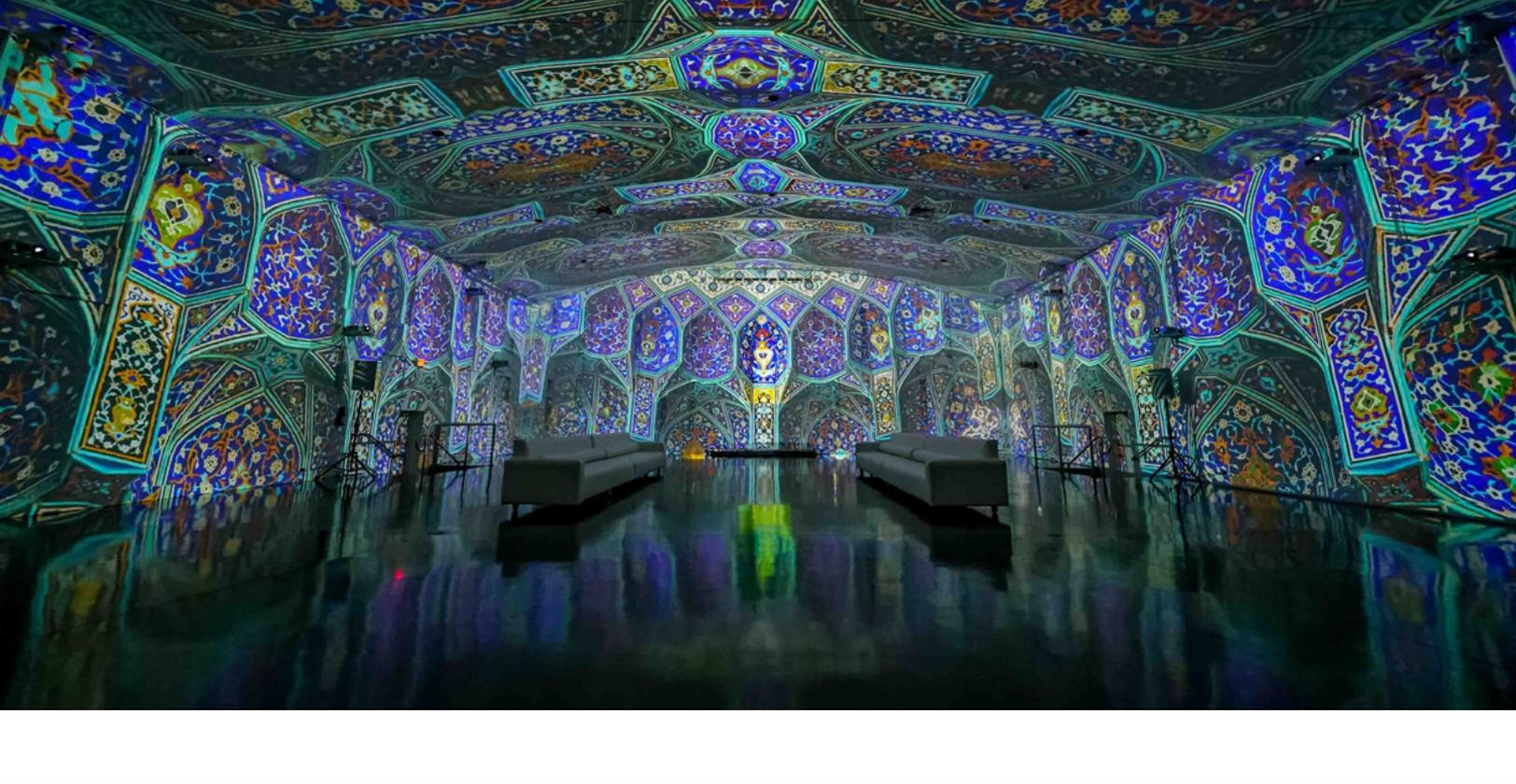
It is our hope that the City of Panama City will see the value in converting the St. Andrews School property into a thriving Media Arts Center to establish a new and exciting cultural anchor for the residents and visitors.

To follow are examples of media arts experiences and an addendum with research that we collected along the way to ensure our recommendations were based on realistic, relevant data.

Please direct any questions about this report to Robin@robinmalpass.com

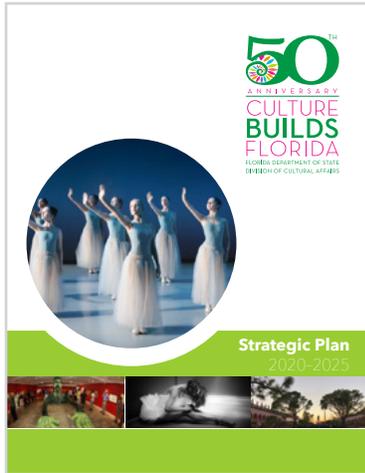


MEDIA ARTS: DIGITAL PROJECTION MAPPING EXAMPLES

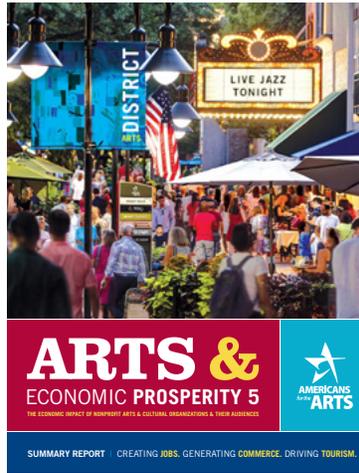




ADDENDUM: ADDITIONAL RESEARCH



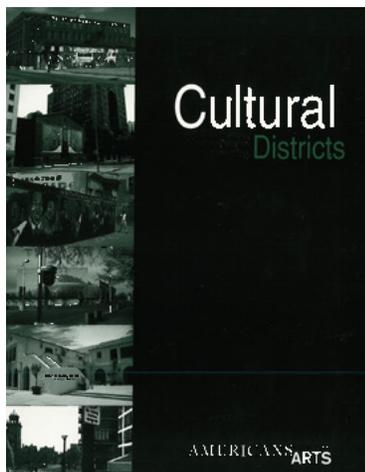
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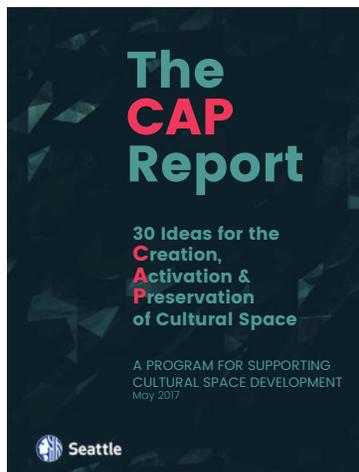
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ArtsEconomic Prosperity 5
Division of Cultural Affairs

The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Florida (Fiscal Year 2015)

Total Nonprofit Arts and Cultural Organizations	Arts and Cultural Organizations	Arts and Cultural Organizations	Total Economic Prosperity
1,241	\$2,241,241,241	\$2,241,241,241	\$4,482,482,482

Economic Impact of Spending by Arts and Cultural Organizations and Their Audiences

Total Economic Impact of Expenditures	Expenditures by Organizations	Expenditures by Audiences	Total Economic Impact
\$1,100,000,000	\$1,100,000,000	\$1,100,000,000	\$2,200,000,000
Total State Government (\$12.0M) Supported	\$1,088,000,000	\$12,000,000	\$1,100,000,000
Revenue Generated by Local Government	\$1,088,000,000	\$12,000,000	\$1,100,000,000
Revenue Generated by State Government	\$1,088,000,000	\$12,000,000	\$1,100,000,000

Event-Related Spending by Arts and Cultural Audiences Totaled \$2.29 billion (including the cost of admission)

Attendance for Arts and Cultural Events	Nonprofit Attendance	Nonprofit Attendance	Total Cultural Attendance
79,377,379	18,838,242	18,838,242	48,997,114
Percentage of Total Attendance	23.8%	23.8%	57.6%
Average Event-Related Spending Per Person	\$29.57	\$126.89	\$33.13
Total Event-Related Expenditures	\$1,333,811,964	\$1,887,024,819	\$3,220,836,783

Nonprofit Arts and Cultural Event Attendees Spent an Average of \$33.53 Per Person (including the cost of admission)

Category of Event-Related Expenditures	Nonprofit Attendance	Nonprofit Attendance	Total Cultural Attendance
Food and Beverages	\$1.74	\$21.51	\$13.19
Seating and Gifts	\$1.54	\$1.51	\$1.51
Clothing Transportation	\$1.05	\$4.47	\$1.56
Other (including one night only)	\$1.18	\$10.57	\$4.77
Other Miscellaneous	\$1.18	\$1.51	\$1.29
Average Event-Related Spending Per Person	\$29.57	\$126.89	\$33.13

Source: Arts & Economic Prosperity 5: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Florida. For more information about this study or about other cultural initiatives in the State of Florida, visit www.floridiansforthearts.org. Copyright 2017 The Association for the Arts (www.associationforthearts.org).

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