DESTINATION PANAMA CITY
REGULARLY SCHEDULED QUARTERLY MEETING
February 8, 2022
9:00AM (immediately following the City of Panama City Commissioner Meetings)

1) Roll Call
2) Approval of Minutes – October 12, 2021
3) Acceptance of TDT Revenue Reports – FY21 Collections October - September
4) Acceptance of TDT Revenue Reports – FY22 Collections October - November
5) Financial Status Reports period ending (pending)
6) Acceptance of Longwoods Destination Research Report
7) Huddle Group - Sports Tourism Final Report & Presentation – Eric Olson
8) Ratification of Fahlgren Mortine Marketing Agency of Record Renewal
9) Consideration Grant Writing Assistance
10) CEO Update
    a) Brand Activation - LovePC
    b) Marketing & Public Relations Update
    c) Visitor's Center Update
        i) Facility
        ii) Events
11) Adjournment

101 West Beach Drive • Panama City, FL 32401
850.215.1700 • DestinationPanamaCity.com

Approve Minutes 2/8/2022

Panama City Community Development Council
dba Destination Panama City
Agenda Item Summary

1. *PRESENTER NAME:* Jennifer M. Vigil President & CEO	**2. *MEETING DATE:*** 2/8/2022

3. *REQUESTED MOTION/ACTION:*

Motion to Accept Minutes for October 12, 2021 as presented.

4. *AGENDA* PRESENTATION ☐ PUBLIC HEARING ☐ CONSENT ☐ REGULAR ☒	**5. *IS THIS ITEM BUDGETED (IF APPLICABLE)?:*** *YES* ☐ *NO* ☐ *IF NO, STATE ACTION REQUIRED* ☐ *N/A* BUDGET ACTION: FINANCIAL IMPACT SUMMARY STATEMENT: DETAILED ANALYSIS ATTACHED?: YES ☐ NO ☐

6. *BACKGROUND:* ***(WHY IS THE ACTION NECESSARY, WHAT ACTION WILL BE ACCOMPLISHED, (WHO, WHERE, WHEN & HOW)***

Minutes for October 12, 2021 are attached for consideration of approval.

DESTINATION PANAMA CITY
REGULARLY SCHEDULED QUARTERLY MEETING MINUTES
October 12, 2021

1) Roll Call
2) Approval of Minutes – July 27. 2021
   a) Board Member Greg Brudnicki motioned to approve the Minutes of July 27, 2021 as presented. Board Member Billy Rader seconded the motion and it passed unanimously.
3) Acceptance of TDT Revenue Reports – Collections thru August 2021
   a) Board Member Greg Brudnicki motioned to accept the TDT Revenue Reports as presented. Board Member Nirav Banker seconded the motion and it passed unanimously.
4) Financial Status Reports period ending August 31, 2021
   a) Board Member Greg Brudnicki motioned to accept the Financial Status Reports as presented. Board Member Nirav Banker seconded the motion and it passed unanimously.
5) Presentation: Robin Malpass, St Andrews School
   a) Following a presentation from Robin Malpass, Board Member Joshua Street stated he was blowen away and excited about what a great addition this would make the the St Andrews neighborhood. Board Member Greg Brudnicki stated he couldn't agree more and that this kind of visionary out of the box thinking would be the game changers for Panama City. Board Members Nirav Banker, Jenna Haligas, Kenneth Brown, Billy Rader, and Chairman Jennine Brown all agreed it was an excellent use of the facility.
   b) Public Participation – Janis Boatright, of the Historic St Andrews Waterfront Partnership stated she personally thought it was heavy towards tourism and the ideas needed to be tempered tourism with a local aspect. She also requested another community input session. David Smith, of 1017 East Carolina Blvd, stated this

would open up a lot of opportunities but he cautioned the Board to make sure there was a balance between tourism and local benefits.

c) CEO Vigil stated that the St. Andrews School was acquired with Tourist Development Tax dollars and the use had to be in alignment with the Florida Statute 125.0104. She also stated that the project leader in the City of Panama City and this activity was done to give them a professional niche marketing insight into the potential uses.

6) Huddle Group - Sports Tourism Proposal

a) Board Member Jenna Haligas motioned to authorize CEO Vigil to engage the Huddle Up Group for guidance on developing sports tourism programming in Panama City. The motion was seconded by Greg Brudnicki and passed unanimously.

7) CEO Annual Evaluation

a) CEO Vigil presented the CEO Evaluation Committee annual evaluations and recommendation to the Board. Board Chairman Jennine Brown stated she felt CEO Vigil did an outstanding job and was well deserving of the full 10%. Board Member Brudnicki motioned for CEO Vigil to receive a 5% raise and a 5% bonus. The motion was seconded by Chairman Jennine Brown and passed unanimously.

8) CEO Update

i) CEO Vigil provided an update on the Visitor's Center Construction, Nearshore Artificial Reef project, Honor's Best Documentary, Marketing & Public Relations Update, and recent as well as upcoming special events.

9) The meeting was adjourned.

Panama City Community Development Council
dba Destination Panama City
Agenda Item Summary

1. *Presenter Name:*	2. *Meeting Date:*
Jennifer M. Vigil President & CEO	2/8/2022

3. *Requested Motion/Action:*

Motion to Accept TDT Revenue Reports for as presented.

4. *Agenda*		5. *Is this item budgeted (if applicable)?:* Yes ☐ No ☐ If No, state action required ☐ N/A
Presentation	☐	Budget Action:
Public Hearing	☐	Financial Impact Summary Statement:
Consent	☐	
Regular	☒	Detailed analysis attached?: Yes ☐ No ☐

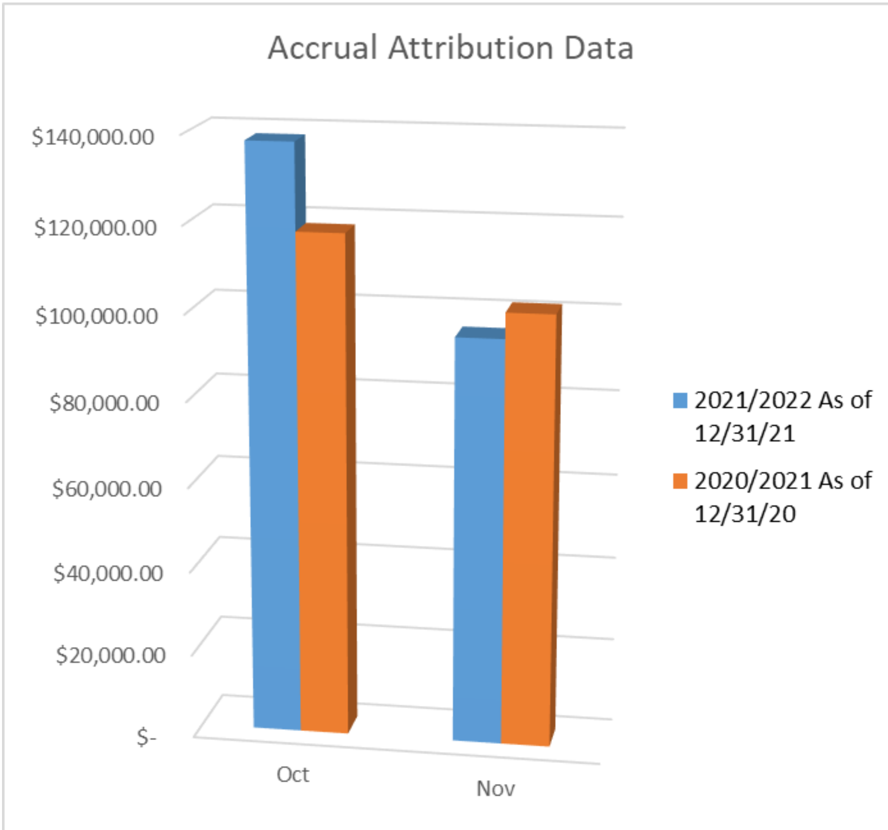
6. *Background:* ***(Why is the action necessary, What action will be accomplished, (Who, Where, When & How)***

Clerk of Court TDT division collects revenue and provides the attached reports.

Destination Panama City creates the TDT Monthly Analysis report, also attached.

Tourist Development Tax, Bay County, Florida

Panama City



Accrual Attribution Data					
	2021/2022 As of 12/31/21	2020/2021 As of 12/31/20	Variance	Variance %	2020/2021 FINAL 12/31/21
Oct	$ 137,924.36	$ 117,894.15	$ 20,030.21	16.99%	$ 133,565.86
Nov	$ 95,349.79	$ 101,344.69	$ (5,994.90)	-5.92%	$ 102,962.22
Dec-Sep	$ 357.25	$ 131.09	$ 226.16		
	$ 233,631.40	**$ 219,369.93**	**$ 14,261.47**	**6.50%**	**$ 236,528.08**

Bay County Tourist Development Tax, Post Office Box 1230, Panama City, Florida 32402
Express Delivery: 840 w 11th St Suite #3000, Panama City, Florida 32401
Phone: (850) 747-5226 Fax: (850) 747-5212
Visit us at: https://TDC.BayCoClerk.com/TouristTax/ Email: TDC@BayCoClerk.com

Tourist Development Tax, Bay County, Florida

FY2022 Cash/Accrual Breakdown

Panama City

		Collected in					
		Nov	Dec	Jan	Feb	Mar - Sept	
	Pre	$ 1,646.81	$ 648.85				$ 2,295.66
	Oct	$ 134,081.27	$ 3,843.09				$ 137,924.36
	Nov	$ 80.00	$ 95,269.79				$ 95,349.79
	Dec		$ 357.25				$ 357.25
	Jan						$ -
Attributed	Feb						$ -
period	Mar						$ -
	Apr						$ -
	May						$ -
	Jun						$ -
	Jul						$ -
	Aug						$ -
	Sep						$ -
	Post						$ -
		$ 135,808.08	$ 100,118.98	$ -	$ -	$ -	$ 235,927.06

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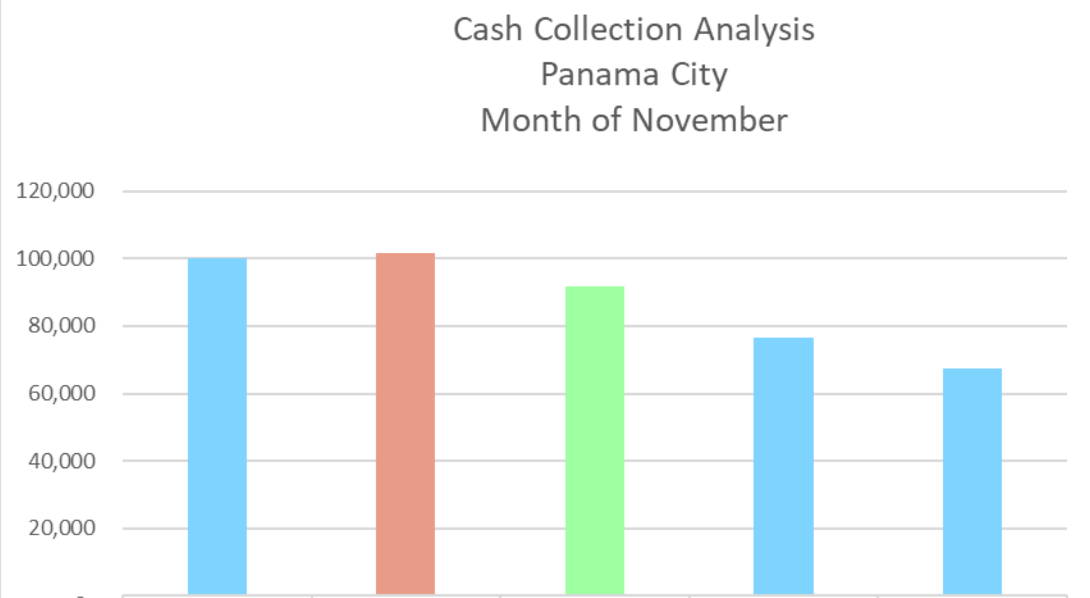
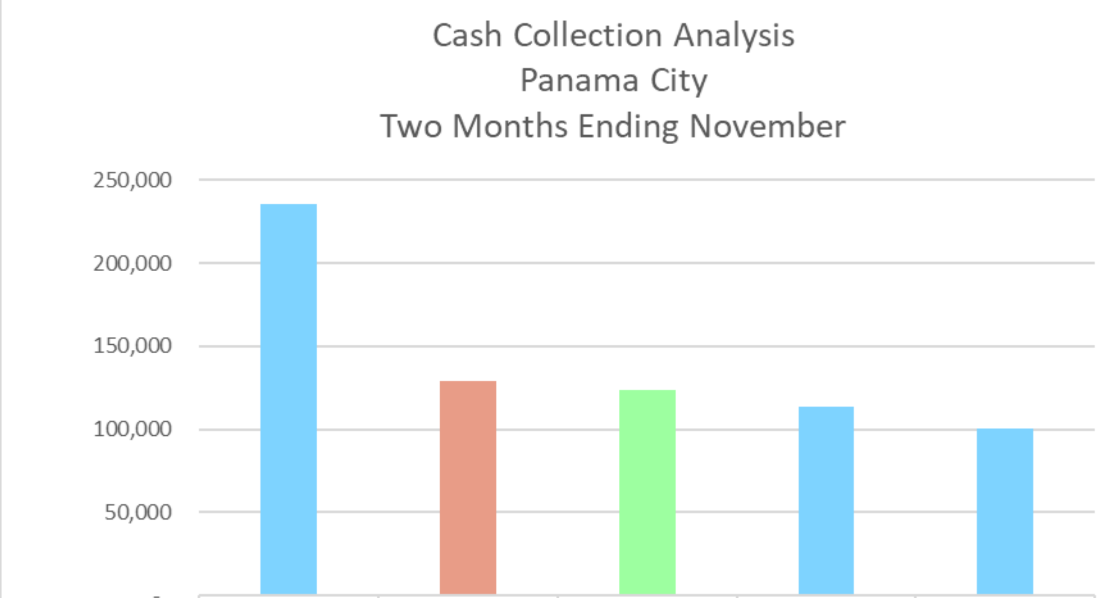
Tourist Development Tax, Bay County, Florida



	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018
NOV*	100,119	101,631	91,644	76,472	67,457



	2021-2022	2020-2021	2019-2020	2018-2019	2017-2018
Year to date	235,927	128,769	123,862	113,726	100,647

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TDT Monthly Analysis

	% change	FY22	% change	FY21	% change	FY20	% change	FY19	% change	FY18	% change	FY17	% change	FY16	% change	2005-06
								5.00%		**5.00%**		**5.00%**		**5.00%**		**2.00%**
OCT	5.47%	135,808.08	3.96%	128,768.79	131.67%	123,861.73	-47.21%	53,465.19	-10.17%	101,281.73	19.23%	112,754.00		94,571.27	8.09%	182,176.66
NOV	-1.49%	100,118.98	10.90%	101,630.73	123.84%	91,643.79	-41.31%	40,942.54	-4.86%	69,765.50	11.00%	73,327.00		66,059.88	2.85%	132,967.44
DEC			-4.60%	78,649.26	118.73%	82,443.03	-45.66%	37,691.14	5.63%	69,355.65	5.76%	65,657.00		62,079.90	9.65%	102,341.35
JAN			-1.34%	78,908.76	57.93%	79,980.05	-23.33%	50,642.49	-6.09%	66,053.88	-10.00%	70,339.00	23.92%	78,155.39	5.42%	129,271.02
FEB			17.96%	87,288.10	23.55%	73,996.73	-27.20%	59,891.56	-3.94%	82,266.95	-7.72%	85,637.00	5.64%	92,804.00	1.11%	158,672.33
MAR			119.91%	195,307.74	10.47%	88,811.23	-45.62%	80,393.83	-4.76%	147,842.53	-2.82%	155,229.00	-20.33%	159,731.00	11.35%	360,623.77
APR			231.81%	219,349.92	-41.19%	66,107.75	-24.44%	112,406.97	-0.32%	148,755.72	-2.61%	149,230.00	17.10%	153,227.00	15.45%	435,889.02
MAY			173.75%	280,541.00	-26.75%	102,481.39	-12.71%	139,913.92	0.48%	160,287.99	4.75%	159,517.00	4.15%	152,286.00	3.23%	484,256.25
JUN			16.62%	326,761.40	49.20%	280,201.96	-21.88%	187,808.86	17.94%	240,405.16	-3.22%	203,829.00	4.32%	210,619.00	2.48%	976,493.95
JUL			146.19%	434,980.46	-23.78%	176,685.02	-15.73%	231,805.34	4.60%	275,072.33	-1.10%	262,982.00	11.66%	265,911.00	29.36%	953,458.99
AUG			57.29%	197,980.46	-20.35%	125,871.61	19.03%	158,028.14	7.51%	132,766.82	14.11%	123,488.00	-8.34%	108,223.00	7.76%	483,301.70
SEP			19.22%	158,520.08	6.24%	132,963.41	7.07%	125,158.45	2.78%	116,889.75	14.31%	113,733.00	3.74%	99,494.00	28.30%	345,926.61
TOTAL	**2.40%**	**235,927.06**	60.60%	2,288,686.70	11.49%	1,425,047.70	-20.65%	1,278,148.43	2.22%	1,610,744.01	2.11%	$ 1,575,722	**20.32%**	$ 1,543,161	8.70%	$4,745,379.09
											2.96%					

Anticipated FY21 1,071,040.00
Unanticipated FY21 1,217,646.70

Over Anticipated Revenue 113.69%

Aggregate Taxable Short Term Rental Receipts

	FY22	FY21	FY20	FY19	FY18	FY17	FY16	FY15
OCT	**2,716,161.60**	**2,575,375.80**	2,477,234.60	1,069,303.80	2,025,634.60	2,255,080.00	1,891,425.40	-
NOV	**2,002,379.60**	**2,032,614.60**	1,832,875.80	818,850.80	1,395,310.00	1,466,540.00	1,321,197.60	-
DEC		**1,572,985.20**	1,648,860.60	753,822.80	1,387,113.00	1,313,140.00	1,241,598.00	-
JAN		**1,578,175.20**	1,599,601.00	1,012,849.80	1,321,077.60	1,406,780.00	1,563,107.80	1,261,390.00
FEB		**1,745,762.00**	1,479,934.60	1,197,831.20	1,645,339.00	1,712,740.00	1,856,080.00	1,756,910.40
MAR		**3,906,154.80**	1,776,224.60	1,607,876.60	2,956,850.60	3,104,580.00	3,194,620.00	4,009,664.80
APR		**4,386,998.40**	1,322,155.00	2,248,139.40	2,975,114.40	2,984,600.00	3,064,540.00	2,616,965.20
MAY		**5,610,820.00**	2,049,627.80	2,798,278.40	3,205,759.80	3,190,340.00	3,045,720.00	2,924,414.20
JUN		**6,535,228.00**	5,604,039.20	3,756,177.20	4,808,103.20	4,076,580.00	4,212,380.00	4,038,126.80
JUL		**8,699,609.20**	3,533,700.40	4,636,106.80	5,501,446.60	5,259,640.00	5,318,220.00	4,762,860.40
AUG		**3,959,609.20**	2,517,432.20	3,160,562.80	2,655,336.40	2,469,760.00	2,164,460.00	2,361,412.00
SEP		**3,170,401.60**	2,659,268.20	2,503,169.00	2,337,795.00	2,274,660.00	1,989,880.00	1,918,151.60
TOTAL	**4,718,541.20**	45,773,734.00	28,500,954.00	25,562,968.60	32,214,880.20	31,514,440.00	30,863,228.80	25,649,895.40

Conservative Economic Impact Projections

Gallup Research Average Visitor Spend Per $100 Room Night

		FY22	FY21	FY20	FY19	FY18	FY17	FY16	FY15
Food	73.00		$ 33,414,826	$ 20,805,696	$ 18,660,967	$ 23,516,863	$ 23,005,541	$ 22,530,157	$ 18,724,424
Transportation / Fuel	23.00		$ 10,527,959	$ 6,555,219	$ 5,879,483	$ 7,409,422	$ 7,248,321	$ 7,098,543	$ 5,899,476
Recreation	52.00		$ 23,802,342	$ 14,820,496	$ 13,292,744	$ 16,751,738	$ 16,387,509	$ 16,048,879	$ 13,337,946
Retail	55.00		$ 25,175,554	$ 15,675,525	$ 14,059,633	$ 17,718,184	$ 17,332,942	$ 16,974,776	$ 14,107,442
Lodging			$ 45,773,734	$ 28,500,954	$ 25,562,969	$ 32,214,880	$ 31,514,440	$ 30,863,229	$ 25,649,895
Total Estimated Economic Impact			$ 138,694,414	$ 86,357,891	$ 77,455,795	$ 97,611,087	$ 95,488,753	$ 93,515,583	$ 77,719,183
Average # Visitors			1,335,067	831,278	745,587	1,127,521	1,103,005	1,080,213	897,746

Approval of Financial Status

Panama City Community Development Council
dba Destination Panama City
Agenda Item Summary

1. ***PRESENTER NAME:*** Jennifer M. Vigil President & CEO	***2/8/2022***

2. ***REQUESTED MOTION/ACTION:***

Approve Financial Reports for period ending December 2021

4. ***AGENDA*** PRESENTATION ☐ PUBLIC HEARING ☐ CONSENT ☐ REGULAR ☒	5. ***IS THIS ITEM BUDGETED (IF APPLICABLE)?:*** ***YES*** ☐ ***NO*** ☐ ***IF NO, STATE ACTION REQUIRED*** ☐ ***N/A*** BUDGET ACTION: FINANCIAL IMPACT SUMMARY STATEMENT: DETAILED ANALYSIS ATTACHED?: YES ☐ NO ☐

6. ***BACKGROUND:*** ***(WHY IS THE ACTION NECESSARY, WHAT ACTION WILL BE ACCOMPLISHED, (WHO, WHERE, WHEN & HOW)***

Accounting staff has prepared the Financial reports. Staff request approval on financials as presented.

Panama City Community Development Council
dba Destination Panama City
Agenda Item Summary

1. *Presenter Name:*
Jennifer M. Vigil
President & CEO

2. *Meeting Date:*
2/8/2022

3. *Requested Motion/Action:*

Accept Longwoods Research presentation

4. *Agenda*

- Presentation ☐
- Public Hearing ☐
- Consent ☐
- Regular ☒

5. *Is this item budgeted (if applicable)?:* *Yes* ☐ *No* ☐ *If No, state action required* ☐ *N/A*

Budget Action:
Financial Impact Summary Statement:

Detailed analysis attached?: Yes ☐ No ☐

6. *Background:* (*<u>Why</u> is the action necessary, <u>what</u> action will be accomplished, (who, where, when & how)*)

As part of the Program of Work approved in the FY22 budget, visitor research was scheduled to be completed. Longwoods completed the research and provided the attached report as well as a highlight presentation that CEO Vigil will present.

Longwoods INTERNATIONAL

near

Panama City Visitation Report
Wave 1: October 2021 – September 2022
5 Key Takeaways

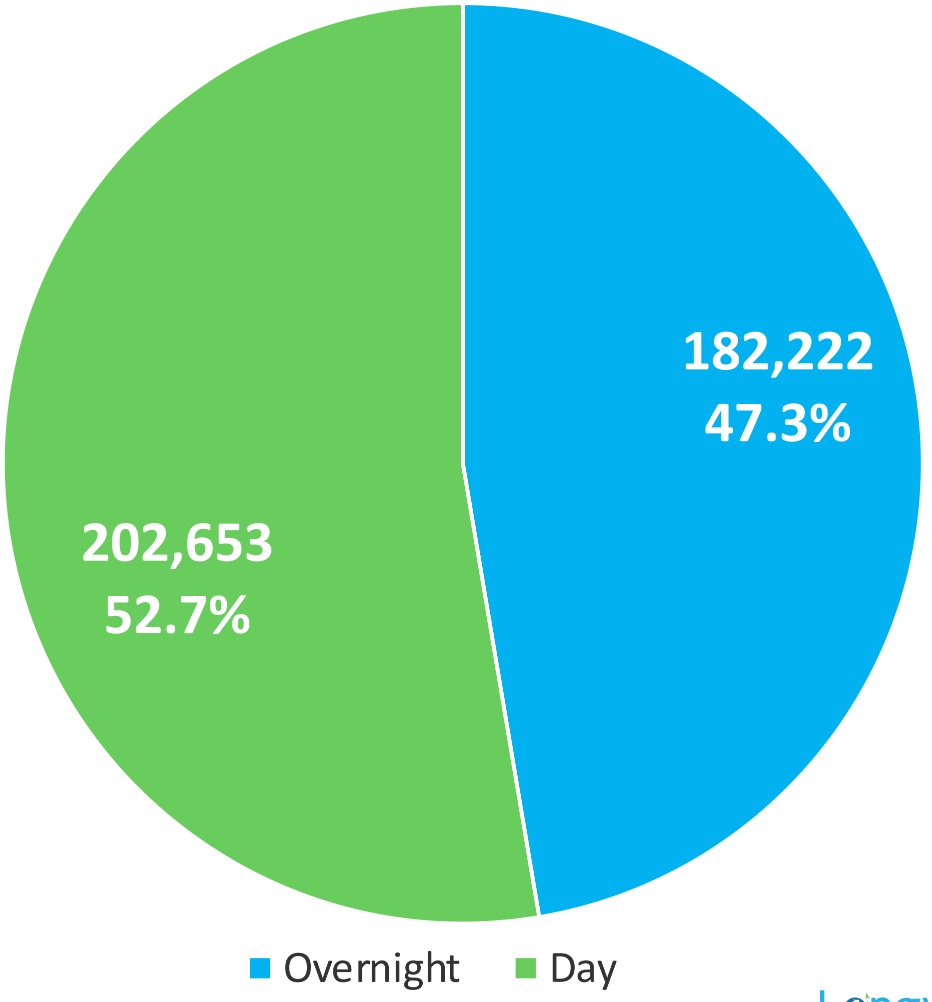
January 2022

DESTINATION PANAMA CITY FLORIDA | WHERE LIFE SETS SAIL

5 Key Takeaways

- There is almost an even split between overnight and day trips. Converting day visitors to overnight is a key strategy to increase visitor revenue.
- On average, every overnight visitor went on 2.2 trips to Panama City, which is a strong repeat visitation pattern and significantly higher than day's 1.8 repeat visitation rate. This shows there is a strong appetite for overnight visitation in Panama City among those who try it at least once.
- The Atlanta and Panama City (excluding anyone living or working in Bay County) DMAs were the leading origin market DMA for both overnight and day visitors. This is positive, as both potential overnight and day visitors here will see any communications or marketing promoting visitation.
  - Please note that 8.2% of Panama City hotel overnight visitors are from the Panama City DMA (again, excluding anyone who lives or works in Bay County.)
- 20.5% of Panama City overnight visitors stayed in one of the 19 hotels tracked for this study, a metric Longwoods will continue to track.
- 76% of overnight visitors and 68% of day visitors also went to Panama City Beach. This means that Panama City AND Panama City beach <u>each</u> attract each other's overnight visitors.

#1: Almost an Even Split Between Overnight & Day Trips



In October 2020 – September 2021, Near tracked **384,875 visitor trips** in Panama City, FL.

47.3% of those trips were **overnight trips**, while **52.7%** were **day trips** in Panama City.

2: Repeat Visitation: Average Number of Trips to Panama City

2.2 trips

Overnight

1.8 trips

Day

#3 - Panama City Origin Markets: DMA

Top 10 DMAs of Origin	Overnight Visitors	Day Visitors
Atlanta, GA	14.3%	10.0%
Panama City, FL (excluding anyone living or working in Bay County)	11.2%	17.3%
Mobile, AL-Pensacola, FL	5.3%	7.3%
Tallahassee, FL-Thomasville, GA	4.6%	6.5%
Birmingham, AL	4.3%	3.8%
Dothan, AL	4.1%	7.4%
Columbus, GA	3.6%	3.7%
Orlando-Daytona Beach-Melbourne, FL	2.8%	1.9%
Tampa-St. Petersburg (Sarasota), FL	2.6%	1.7%
Nashville, TN	2.3%	2.6%

4: Panama City Hotel Visitors

20.5%

16,697 of Panama City's tracked unique visitors stayed in one of the 19 hotels included in this study.

#4: Panama City Hotels Overnight Origin Markets: DMA

Top 10 DMAs of Origin: Hotels	Hotels Overnight Visitors
Atlanta, GA	12.8%
Panama City, FL	8.2%
Mobile, AL-Pensacola, FL	6.5%
Birmingham, AL	5.5%
Tallahassee, FL-Thomasville, GA	4.4%
Dothan, AL	4.3%
Columbus, GA	3.7%
Montgomery-Selma, AL	3.2%
Nashville, TN	2.6%
Orlando-Daytona Beach-Melbourne, FL	2.6%

#3: Panama City Overnight – Top 10 Hotels Used

Hotels	% of Overnight Hotel Visitors	% of Total Overnight Visitors
La Quinta Inn & Suites	12.9%	4.0%
Hilton Garden Inn	9.5%	3.0%
Quality Inn & Conference Center	7.3%	2.3%
Econo Lodge, Longwoods	7.2%	2.2%
Days Inn by Wyndham Panama City	6.4%	2.0%
Holiday Inn	5.6%	1.8%
Best Western Plus	5.3%	1.7%
Suburban Extended Stay	5.0%	1.6%
Ramada	5.0%	1.6%
Hathaway Inn	4.6%	1.4%

5 - Overlap: Percentage of Panama City Visitors Who Also Went to Panama City Beach

Overnight	Day
76.0%	68.4%

Panama City Visitation Report
Wave 1: October 2021 – September 2022

DESTINATION
PANAMA CITY
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January 2022

Table of Contents

Introduction & Research Objectives

In order to better understand overnight and day visitation to Panama City, FL, Longwoods partnered with Near to complete this custom visitation study.

This research focuses on these areas:

- What are the overnight and day origin markets for Panama City visitors?
- What percentage of Panama City visitors also visited Panama City Beach?
- What is the monthly breakdown of visitation to Panama City for overnight and day visitors?
- What is the average length of stay for overnight and day visitors?
- What day of the week did overnight and day visits start/take place?
- What percentage of visitors stayed at a hotel in Panama City, and what is each hotel's origin markets?

This report both delves into the methodology and results of that study.

Introduction

Near has been tracking U.S. visitation to countries, states, cities and regions since 1990 via Longwoods Travel USA®, the largest ongoing survey of American travelers.

- Offers the benefit of a representative, projectable national sample.
- Now complementing this research with timely mobile location data from Near.
- Present in 180 countries, Near is a mobile technology company that gets its geolocation data from two sources: approximately 150,000 apps that require location permission, and ads served on mobile devices from their real time bidding ad exchange.
- Near is currently collecting location data from over 300 million mobile devices in North America monthly. The data is 100% GPS-based and never uses cellphone towers. This means locations are accurate to within three meters.
- Please note that this is not a randomly drawn sample fully representative of the visitor population, but it provides strong directional data to assist in strategic goals.
- To qualify as a visitor, the mobile device had to be confirmed in the destination for at least eight hours for overnight trips and two hours for day trips.

Methodology

While limited to mobile users and location-only data, Near provides a highly useful complement to Longwoods Travel USA®, especially for smaller destinations because of its huge sample size: 384,875 total tracked mobile device trips to Panama City, FL for 2020.

Overnight Base Size	Day Base Size
182,222	202,653

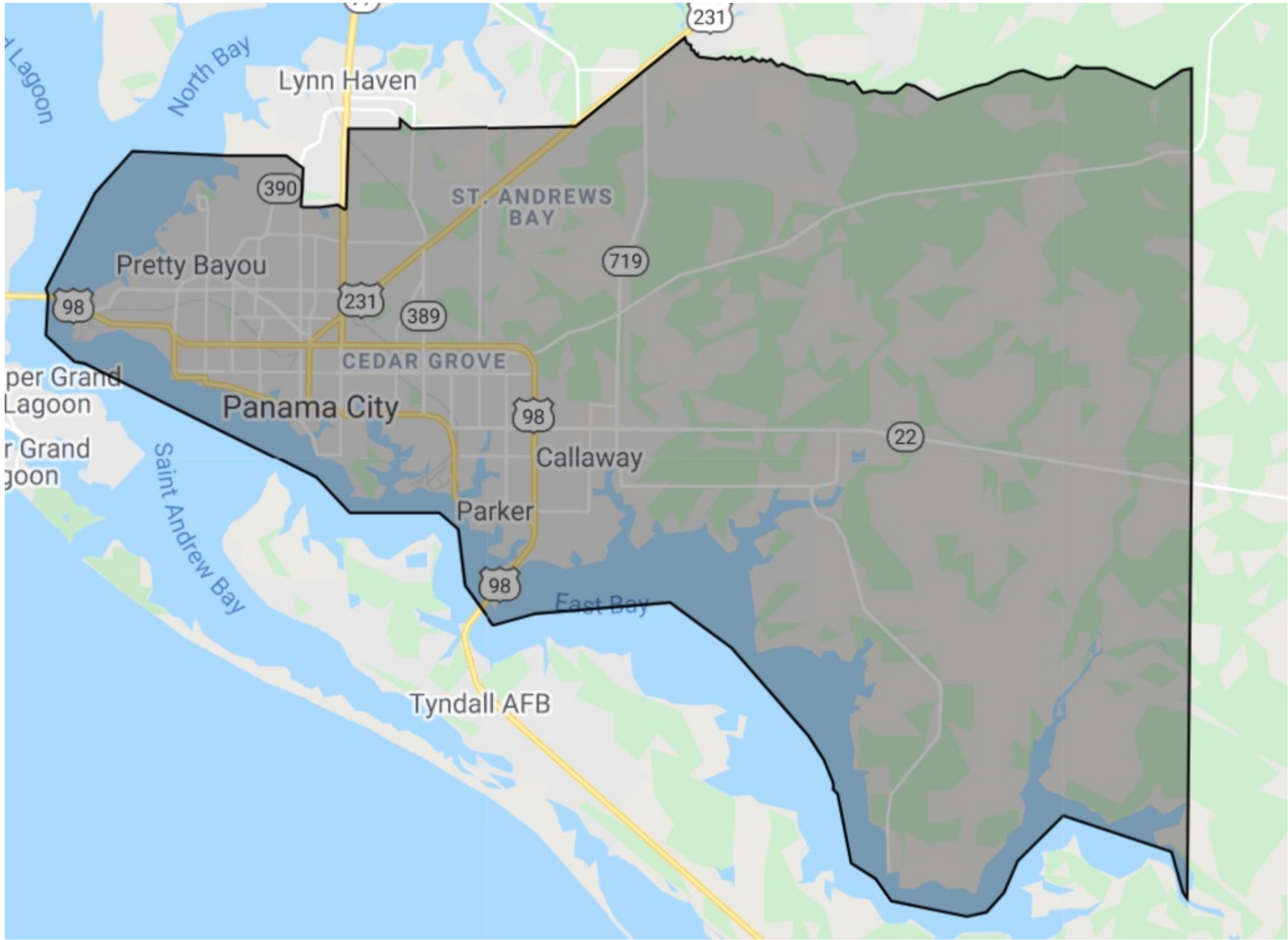
- Anyone living or working within Bay County, FL was excluded from the study.

Methodology

Definitions:

- **Visitor** – this measure focuses on the visitor. Despite how many times a device enters the area being measured, the specific home location is only included one time. We focus on this when looking at origin markets.
- **Total Trips** – this measure looks at the volume of total trips captured in the Near database. This variable is used for variables such as month of the trips, day of the week the trip started, and length of trip.

Geo-Fencing Polygon: Study Area



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near

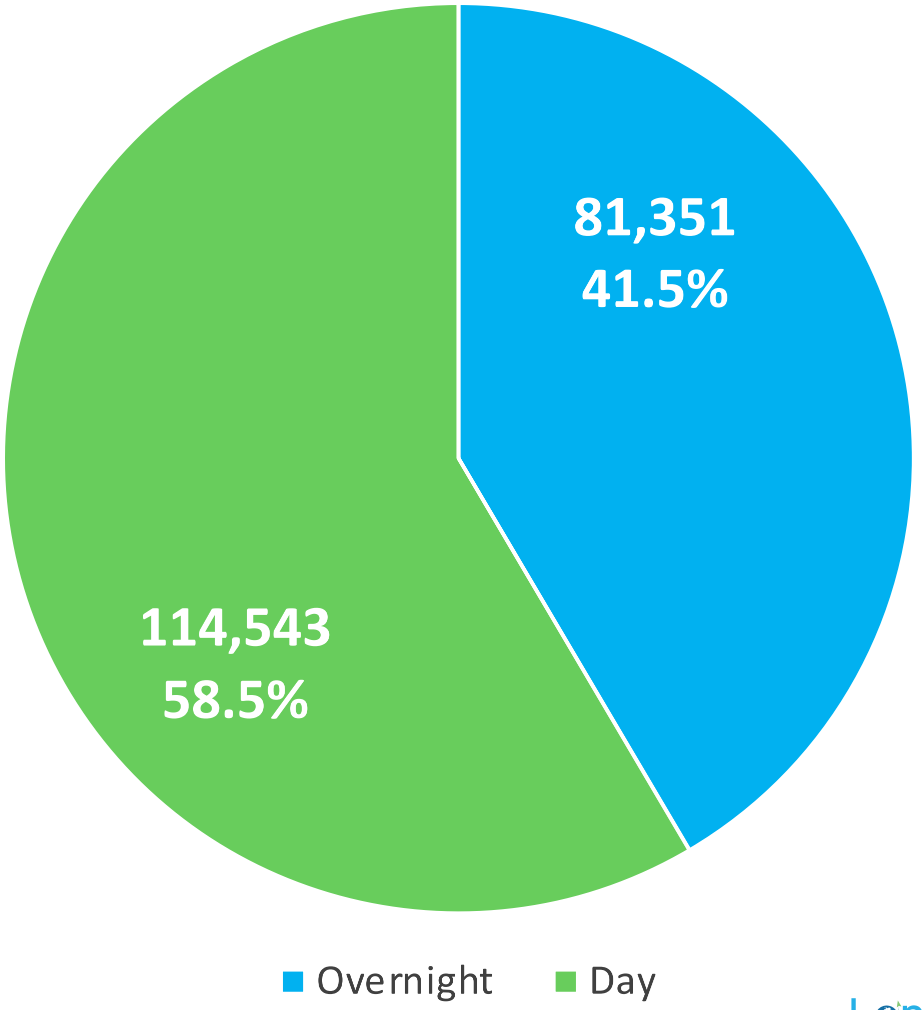
Panama City Visitation: Key Findings

DESTINATION PANAMA CITY FLORIDA | WHERE LIFE SETS SAIL

Key Findings

- There is almost an even split between overnight and day trips.
- On average, every overnight visitor went on 2.2 trips to Panama City, which is a strong repeat visitation pattern and significantly higher than day's 1.8 repeat visitation rate.
- The leading origin states for both overnight and day were Florida, Georgia, and Alabama, with the city having an overall strong draw from regional drive markets.
- The Atlanta and Panama City (excluding Bay County) DMAs were the leading origin market DMA for both overnight and day visitors.
- 20.5% of Panama City overnight visitors stayed in one of the 19 hotels tracked for this study.
- 76% of overnight visitors and 68% of day visitors also went to Panama City Beach.
- July 2021, April 2021, August 2021, and March 2021 were the strongest visitation months for overnight visitation, and March 2021, April 2021, and July 2021 for day travel.
- Overnight visitors stayed an average of 2.6 days, while day trips last an average of 5.8 hours.
- Monday, Friday and Saturday were the most popular start days for overnight trips to Panama City, while Saturday and Friday were the most popular days for day trips.

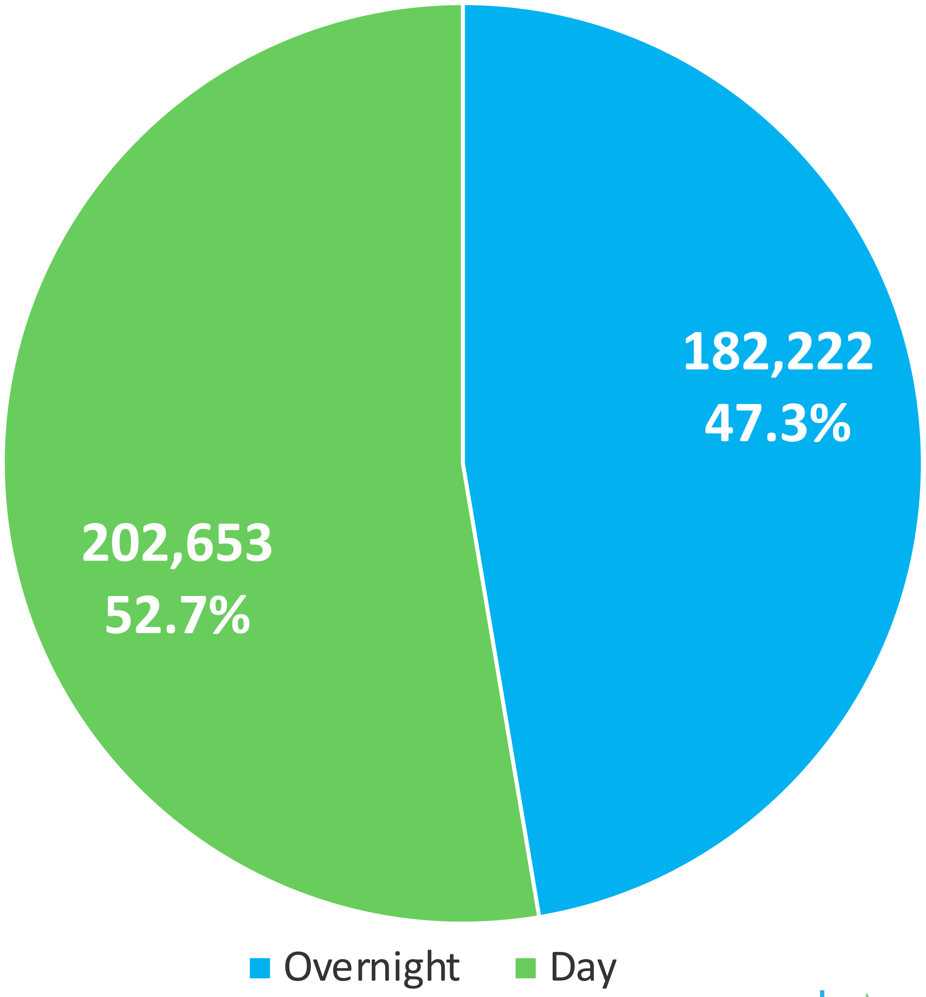
Visitors: Overnight vs Day



In October 2020 – September 2021, Near tracked **195,894 unique visitor mobile devices** in Panama City, FL.

41.5% of those trips were **overnight visitors**, while **58.5%** were **day visitors** in Panama City.

Trips: Overnight vs Day



In October 2020 – September 2021, Near tracked **384,875 visitor trips** in Panama City, FL.

47.3% of those trips were **overnight trips**, while **52.7%** were **day trips** in Panama City.

Panama City Origin Markets: State

Top 10 States of Origin	Overnight Visitors	Day Visitors
Florida	27.6%	34.1%
Georgia	23.1%	18.7%
Alabama	15.3%	17.8%
Tennessee	4.9%	5.0%
Texas	3.7%	3.0%
Louisiana	2.6%	1.7%
Mississippi	2.4%	1.8%
Kentucky	1.9%	2.0%
Indiana	1.6%	1.8%
North Carolina	1.6%	1.1%

Panama City Origin Markets: DMA

Top 10 DMAs of Origin	Overnight Visitors	Day Visitors
Atlanta, GA	14.3%	10.0%
Panama City, FL	11.2%	17.3%
Mobile, AL-Pensacola, FL	5.3%	7.3%
Tallahassee, FL-Thomasville, GA	4.6%	6.5%
Birmingham, AL	4.3%	3.8%
Dothan, AL	4.1%	7.4%
Columbus, GA	3.6%	3.7%
Orlando-Daytona Beach-Melbourne, FL	2.8%	1.9%
Tampa-St. Petersburg (Sarasota), FL	2.6%	1.7%
Nashville, TN	2.3%	2.6%

Panama City: Hotel Visitors

20.5%

16,697 of Panama City's tracked unique visitors stayed in one of the 19 hotels included in this study.

Panama City Overnight – Hotels Used

Hotels	% of Overnight Hotel Visitors	% of Total Overnight Visitors
La Quinta Inn & Suites	12.9%	4.0%
Hilton Garden Inn	9.5%	3.0%
Quality Inn & Conference Center	7.3%	2.3%
Econo Lodge, Longwoods	7.2%	2.2%
Days Inn by Wyndham Panama City	6.4%	2.0%
Holiday Inn	5.6%	1.8%
Best Western Plus	5.3%	1.7%
Suburban Extended Stay	5.0%	1.6%
Ramada	5.0%	1.6%
Hathaway Inn	4.6%	1.4%

Panama City Overnight – Hotels Used

Hotels	% of Overnight Hotel Visitors	% of Total Overnight Visitors
Red Roof Inn	4.4%	1.4%
Courtyard Marriott	4.1%	1.3%
Comfort Inn & Suites Panama City Mall Area	3.6%	1.1%
Quality Inn & Suites	3.5%	1.1%
Rodeway Inn	3.4%	1.1%
Comfort Inn & Suites	3.3%	1.0%
Microtel Inn & Suites by Wyndham	3.2%	1.0%
Fairway Inn	2.9%	0.9%
TownePlace Suites	2.7%	0.9%

Overlap: Percentage of Panama City Visitors Who Also Went to Panama City Beach

76.0%

Overnight

68.4%

Day

Repeat Visitation: Average Number of Trips to Panama City

2.2 trips

Overnight

1.8 trips

Day

Panama City Trip Share by Month

Month	Total Overnight Trips	Total Day Trips
October 2020	7.3%	6.8%
November 2020	6.3%	5.6%
December 2020	6.4%	5.8%
January 2021	6.1%	6.0%
February 2021	6.3%	6.9%
March 2021	10.0%	12.8%
April 2021	10.5%	12.2%
May 2021	8.3%	9.6%
June 2021	8.8%	9.7%
July 2021	13.0%	12.0%
August 2021	10.1%	7.0%
September 2021	6.9%	5.7%

Panama City: Average Length of Trip

2.6 days

Overnight

5.8 hours

Day

2020 Trip Start Day of Week: Panama City Trips

Day of Week	Total Overnight Trips	Total Day Trips
Monday	17.3%	13.4%
Tuesday	13.1%	12.8%
Wednesday	11.4%	12.8%
Thursday	13.8%	13.8%
Friday	17.6%	15.3%
Saturday	15.6%	19.8%
Sunday	11.3%	12.0%

October 2021 – September 2022 Panama City Overnight Visitation

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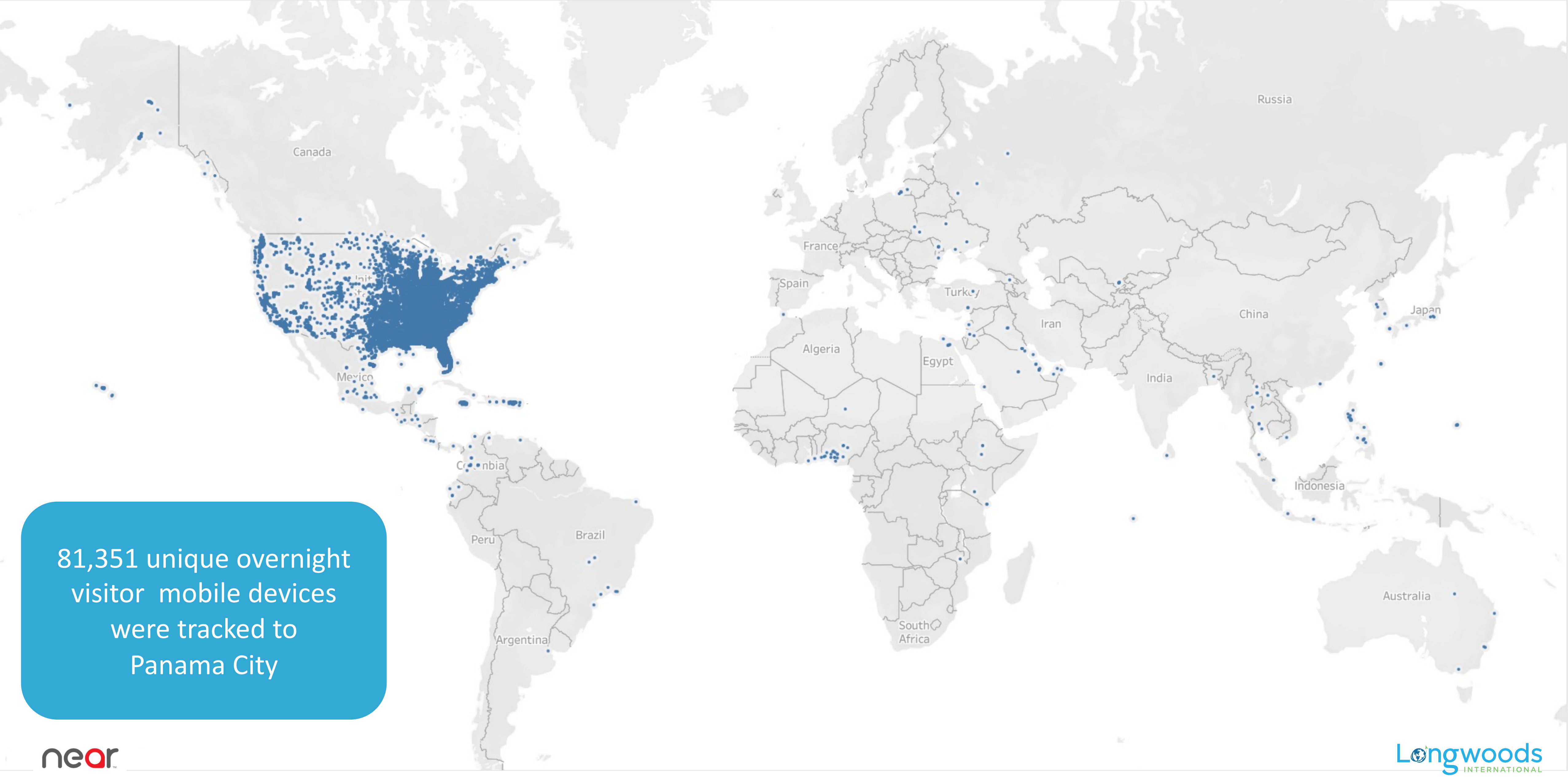
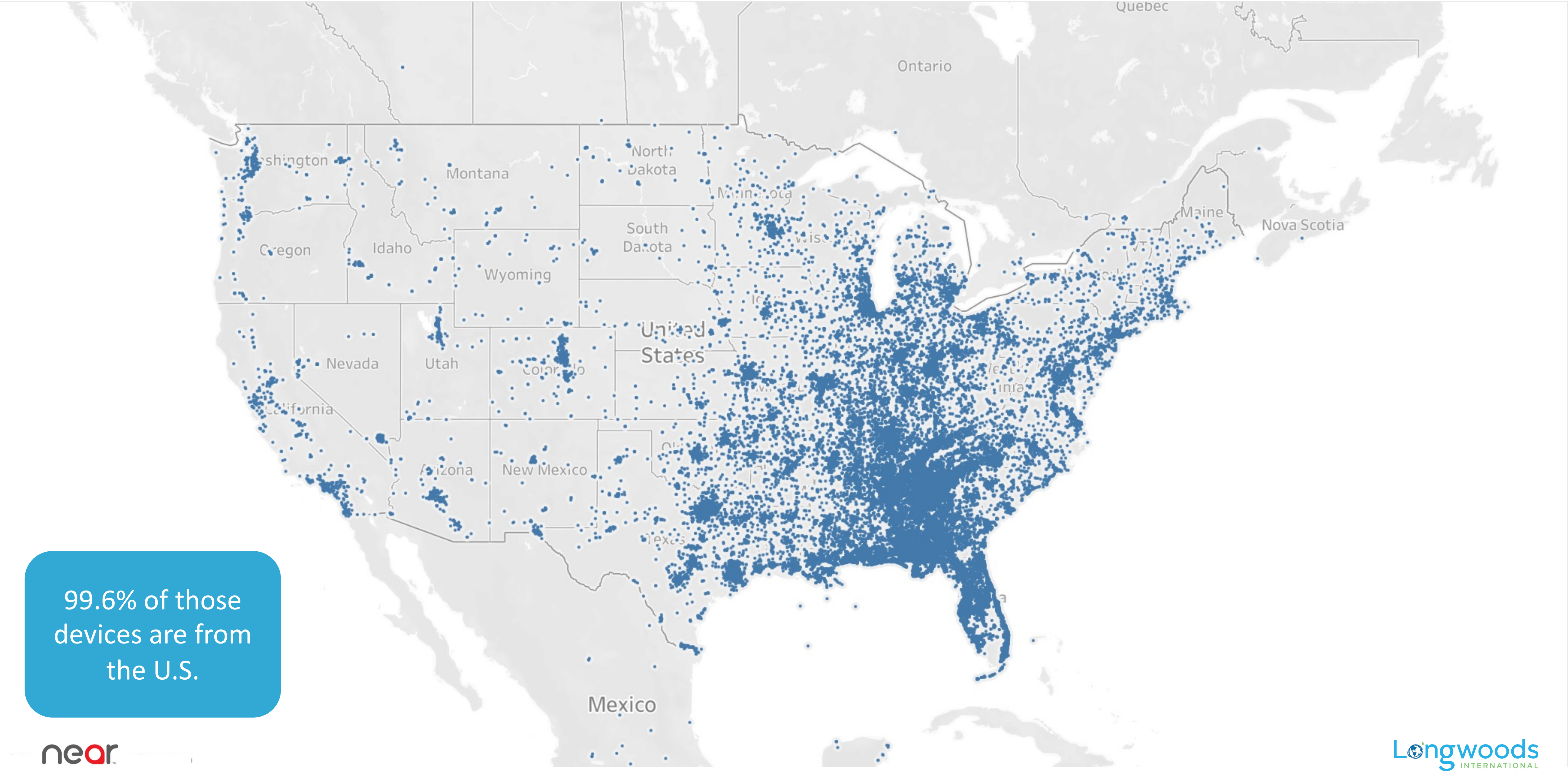
Panama City Overnight Unique Visitors: October 2020 - September 2021



81,351 unique overnight visitor mobile devices were tracked to Panama City

Panama City Overnight Unique Visitors: October 2020 - September 2021

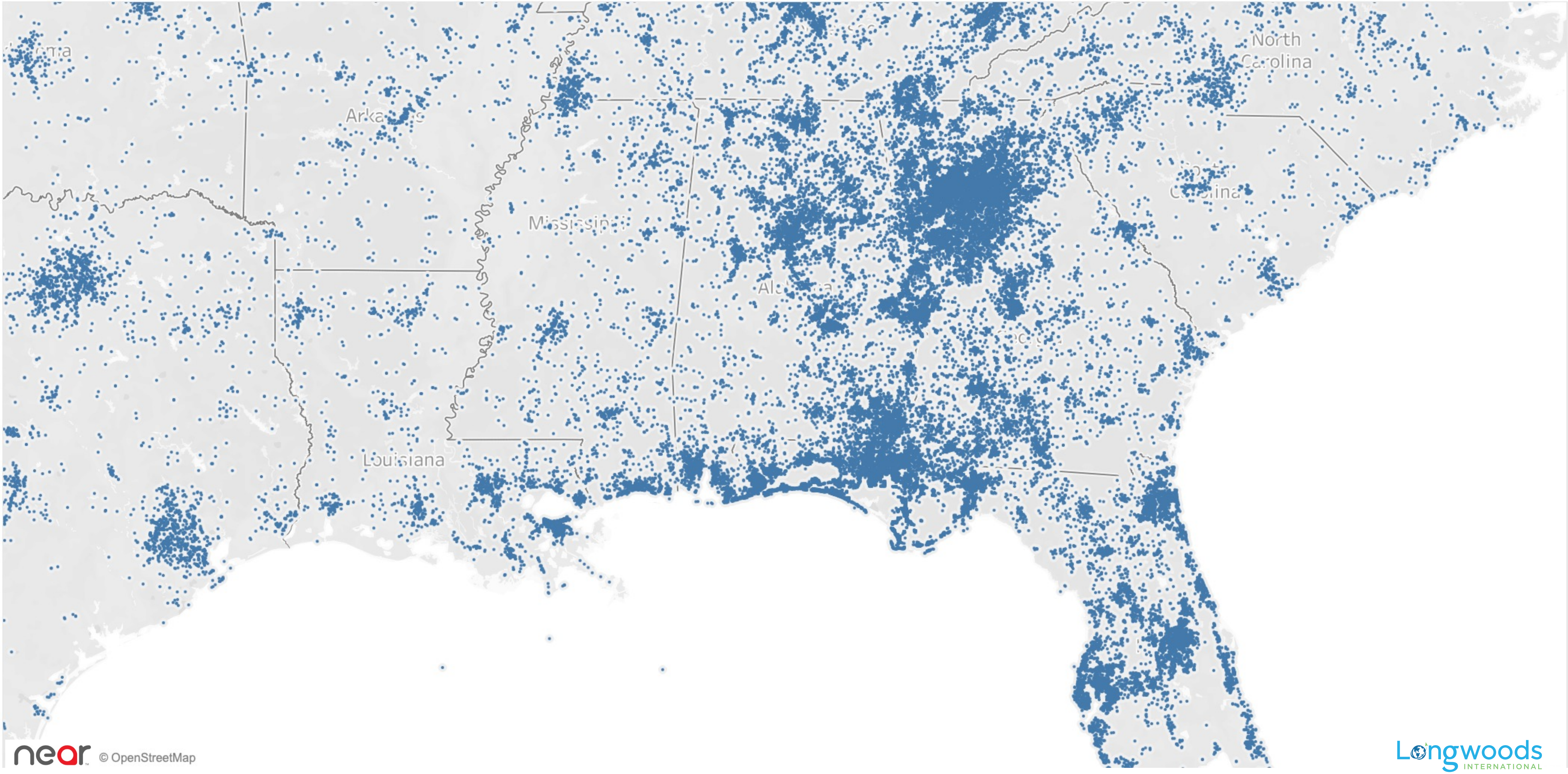


99.6% of those devices are from the U.S.

Panama City Overnight Origin Markets: State

Top 10 States of Origin	Overnight Visitors
Florida	27.6%
Georgia	23.1%
Alabama	15.3%
Tennessee	4.9%
Texas	3.7%
Louisiana	2.6%
Mississippi	2.4%
Kentucky	1.9%
Indiana	1.6%
North Carolina	1.6%

Panama City Overnight Unique Visitors: October 2020 - September 2021



near

Longwoods
INTERNATIONAL

Panama City Overnight Origin Markets: DMA

Top 10 DMAs of Origin	Overnight Visitors
Atlanta, GA	14.3%
Panama City, FL	11.2%
Mobile, AL-Pensacola, FL	5.3%
Tallahassee, FL-Thomasville, GA	4.6%
Birmingham, AL	4.3%
Dothan, AL	4.1%
Columbus, GA	3.6%
Orlando-Daytona Beach-Melbourne, FL	2.8%
Tampa-St. Petersburg (Sarasota), FL	2.6%
Nashville, TN	2.3%

Overnight Repeat Visitation: Average Number of Trips to Panama City

2.2 trips

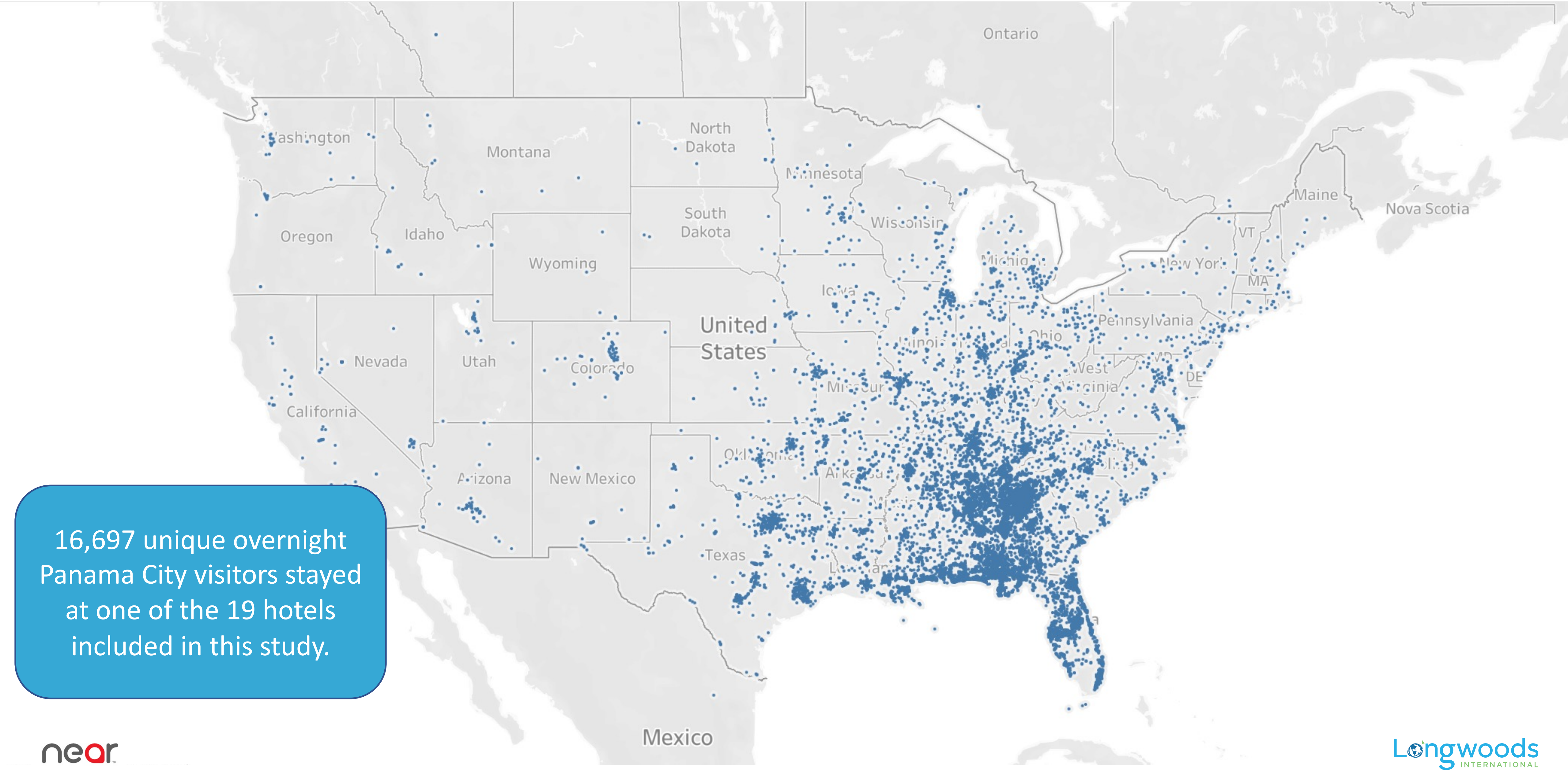
Average number of trips taken by overnight visitors to Panama City

Panama City: Hotel Visitors

20.5%

16,697 of Panama City's tracked unique visitors stayed in one of the 19 hotels included in this study.

October 2020 - September 2021 Panama City Hotels Unique Visitors



16,697 unique overnight Panama City visitors stayed at one of the 19 hotels included in this study.

Panama City Overnight: Hotels Used

Hotels	% of Overnight Hotel Visitors	% of Total Overnight Visitors
La Quinta Inn & Suites	12.9%	4.0%
Hilton Garden Inn	9.5%	3.0%
Quality Inn & Conference Center	7.3%	2.3%
Econo Lodge, Longwoods	7.2%	2.2%
Days Inn by Wyndham Panama City	6.4%	2.0%
Holiday Inn	5.6%	1.8%
Best Western Plus	5.3%	1.7%
Suburban Extended Stay	5.0%	1.6%
Ramada	5.0%	1.6%
Hathaway Inn	4.6%	1.4%

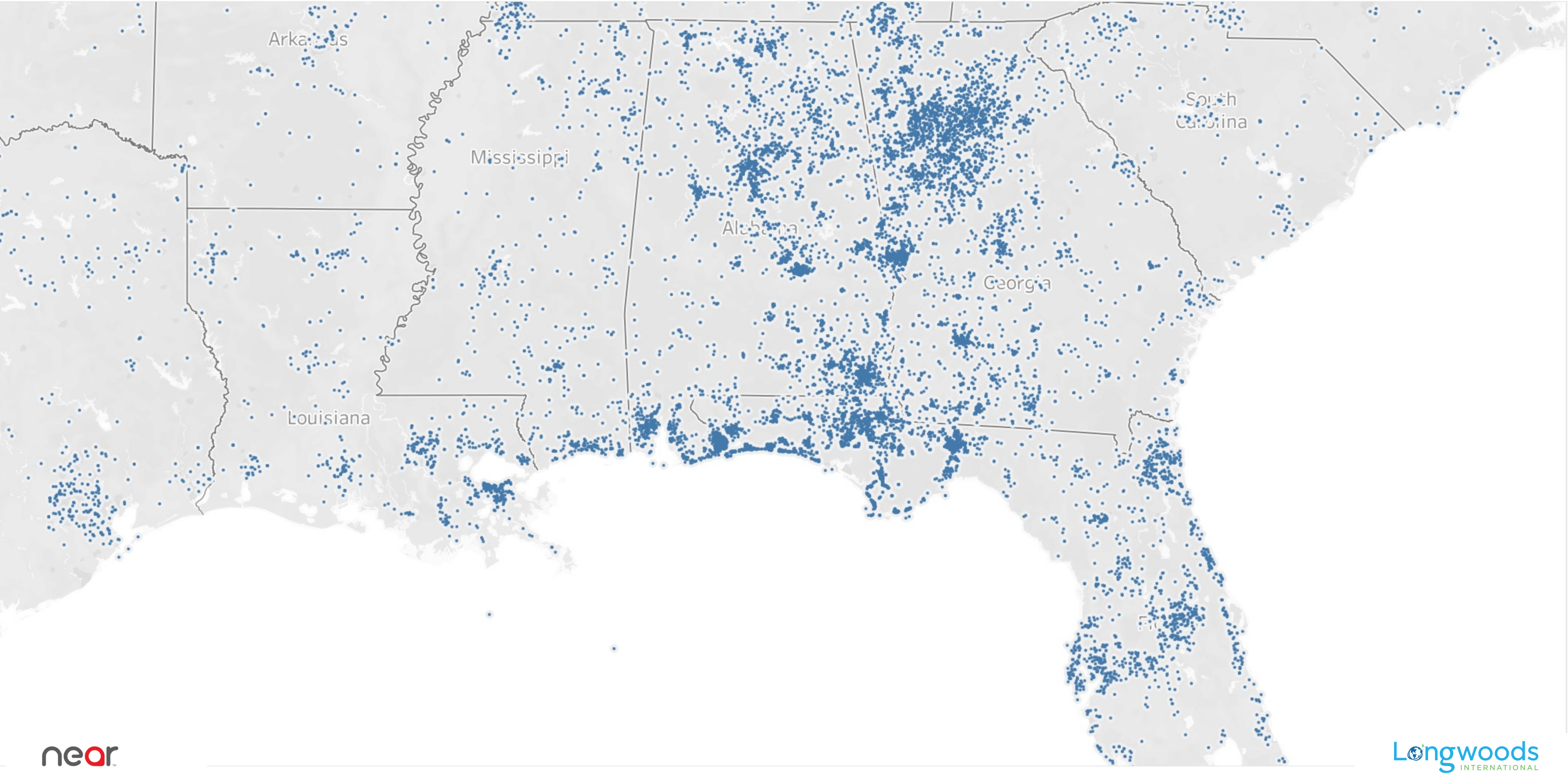
Panama City Overnight: Hotels Used

Hotels	% of Overnight Hotel Visitors	% of Total Overnight Visitors
Red Roof Inn	4.4%	1.4%
Courtyard Marriott	4.1%	1.3%
Comfort Inn & Suites Panama City Mall Area	3.6%	1.1%
Quality Inn & Suites	3.5%	1.1%
Rodeway Inn	3.4%	1.1%
Comfort Inn & Suites	3.3%	1.0%
Microtel Inn & Suites by Wyndham	3.2%	1.0%
Fairway Inn	2.9%	0.9%
TownePlace Suites	2.7%	0.9%

Panama City Hotels Overnight Origin Markets: State

Top 10 States of Origin: Hotels	Hotels Overnight Visitors	Total Overnight Visitors
Florida	23.9%	27.6%
Georgia	21.1%	23.1%
Alabama	19.6%	15.3%
Tennessee	5.2%	4.9%
Texas	4.5%	3.7%
Louisiana	3.9%	2.6%
Mississippi	3.4%	2.4%
Kentucky	2.2%	1.9%
Indiana	1.4%	1.6%
Illinois	1.4%	1.4%

October 2020 - September 2021 Panama City Hotels Unique Visitors



near

Longwoods INTERNATIONAL

Panama City Hotels Overnight Origin Markets: DMA

Top 10 DMAs of Origin: Hotels	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	12.8%	14.3%
Panama City, FL	8.2%	11.2%
Mobile, AL-Pensacola, FL	6.5%	5.3%
Birmingham, AL	5.5%	4.3%
Tallahassee, FL-Thomasville, GA	4.4%	4.6%
Dothan, AL	4.3%	4.1%
Columbus, GA	3.7%	3.6%
Montgomery-Selma, AL	3.2%	2.0%
Nashville, TN	2.6%	2.3%
Orlando-Daytona Beach-Melbourne, FL	2.6%	2.8%

Overlap: Percentage of Overnight Panama City Visitors Who Also Went to Panama City Beach

76.0%

Panama City Overnight – Panama City Beach Share

Top 10 States of Origin	% of Overnight Visitors That Went to Panama City Beach	Total Overnight Visitors
Florida	61.5%	27.6%
Georgia	88.8%	23.1%
Alabama	81.0%	15.3%
Tennessee	86.9%	4.9%
Texas	75.6%	3.7%
Louisiana	77.3%	2.6%
Mississippi	73.7%	2.4%
Kentucky	89.7%	1.9%
Indiana	84.1%	1.6%
North Carolina	71.0%	1.6%

Panama City Overnight – Hotel Share: DMA

Top 10 DMAs of Origin	% of Overnight Visitors That Went to Panama City Beach	Total Overnight Visitors
Atlanta, GA	90.6%	14.3%
Panama City, FL	61.4%	11.2%
Mobile, AL-Pensacola, FL	68.1%	5.3%
Tallahassee, FL-Thomasville, GA	68.5%	4.6%
Birmingham, AL	86.1%	4.3%
Dothan, AL	77.4%	4.1%
Columbus, GA	88.2%	3.6%
Orlando-Daytona Beach-Melbourne, FL	58.5%	2.8%
Tampa-St. Petersburg (Sarasota), FL	56.9%	2.6%
Nashville, TN	85.0%	2.3%

Panama City Overnight: Trip Share by Month

Month	Total Overnight Trips
October 2020	7.3%
November 2020	6.3%
December 2020	6.4%
January 2021	6.1%
February 2021	6.3%
March 2021	10.0%
April 2021	10.5%
May 2021	8.3%
June 2021	8.8%
July 2021	13.0%
August 2021	10.1%
September 2021	6.9%

Panama City Overnight: Start Day of Trip

Day of Week	Total Overnight Trips
Monday	17.3%
Tuesday	13.1%
Wednesday	11.4%
Thursday	13.8%
Friday	17.6%
Saturday	15.6%
Sunday	11.3%

Panama City Overnight: Average Length of Trip

63.0 hours

2.6 days

Panama City Overnight: Average Length of Trip by Origin States

Top 10 States of Origin	Days Spent in Panama City	Total Overnight Visitors
Florida	2.35	27.6%
Georgia	2.48	23.1%
Alabama	2.14	15.3%
Tennessee	3.00	4.9%
Texas	3.43	3.7%
Louisiana	3.26	2.6%
Mississippi	2.92	2.4%
Kentucky	2.90	1.9%
Indiana	3.22	1.6%
North Carolina	3.39	1.6%

Panama City Overnight: Average Length of Trip by Origin DMAs

Top 10 DMAs of Origin	Days Spent in Panama City	Total Overnight Visitors
Atlanta, GA	2.76	14.3%
Panama City, FL	2.17	11.2%
Mobile, AL-Pensacola, FL	2.15	5.3%
Tallahassee, FL-Thomasville, GA	1.96	4.6%
Birmingham, AL	2.58	4.3%
Dothan, AL	1.83	4.1%
Columbus, GA	1.84	3.6%
Orlando-Daytona Beach-Melbourne, FL	3.34	2.8%
Tampa-St. Petersburg (Sarasota), FL	3.12	2.6%
Nashville, TN	2.95	2.3%

Panama City Overnight: Average Length of Trip by Month

Month	Days in Panama City	Total Overnight Trips
October 2020	2.47	7.3%
November 2020	2.64	6.3%
December 2020	2.65	6.4%
January 2021	2.61	6.1%
February 2021	2.69	6.3%
March 2021	2.60	10.0%
April 2021	2.70	10.5%
May 2021	2.33	8.3%
June 2021	2.45	8.8%
July 2021	2.84	13.0%
August 2021	2.92	10.1%
September 2021	2.41	6.9%

Panama City Overnight: Average Length of Trip by Start Day of Trip

Day of Week	Days in Panama City	Total Overnight Trips
Monday	3.11	17.3%
Tuesday	2.64	13.1%
Wednesday	2.51	11.4%
Thursday	2.56	13.8%
Friday	2.22	17.6%
Saturday	2.33	15.6%
Sunday	3.11	11.3%

October 2021 – September 2022 Panama City Day Visitation

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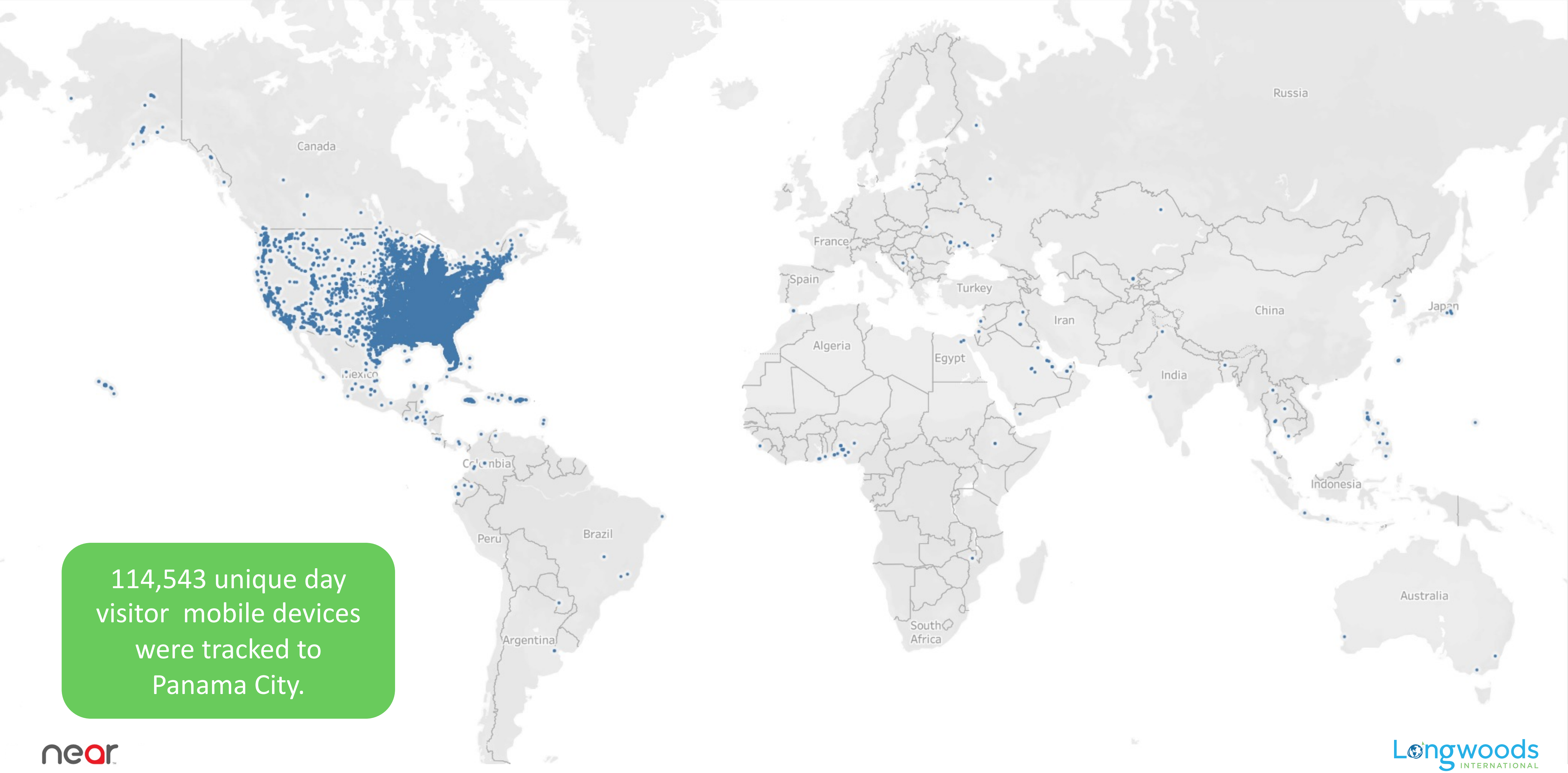
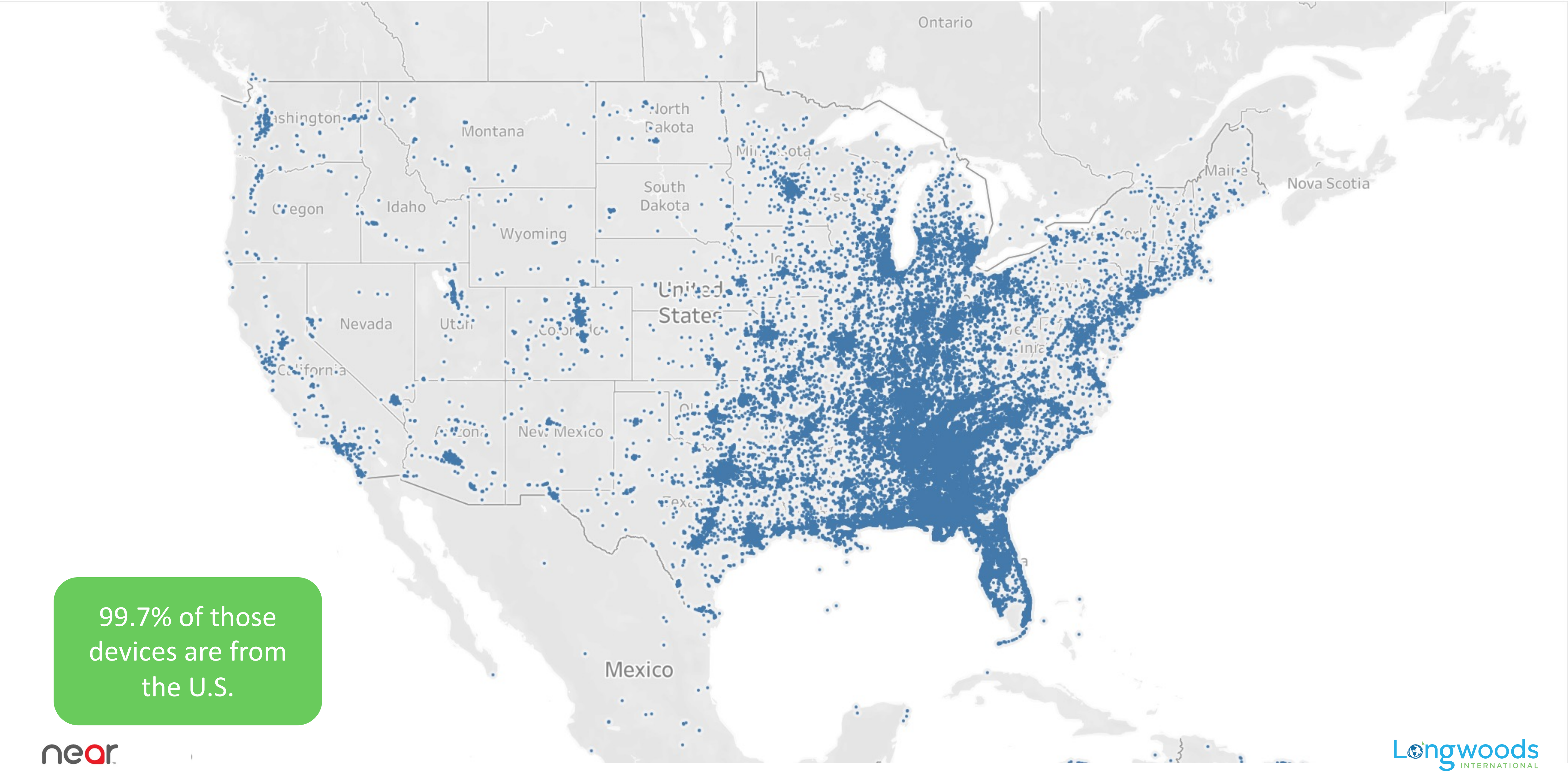
Panama City Unique Day Visitors: October 2020 - September 2021



114,543 unique day visitor mobile devices were tracked to Panama City.

Panama City Unique Day Visitors: October 2020 - September 2021

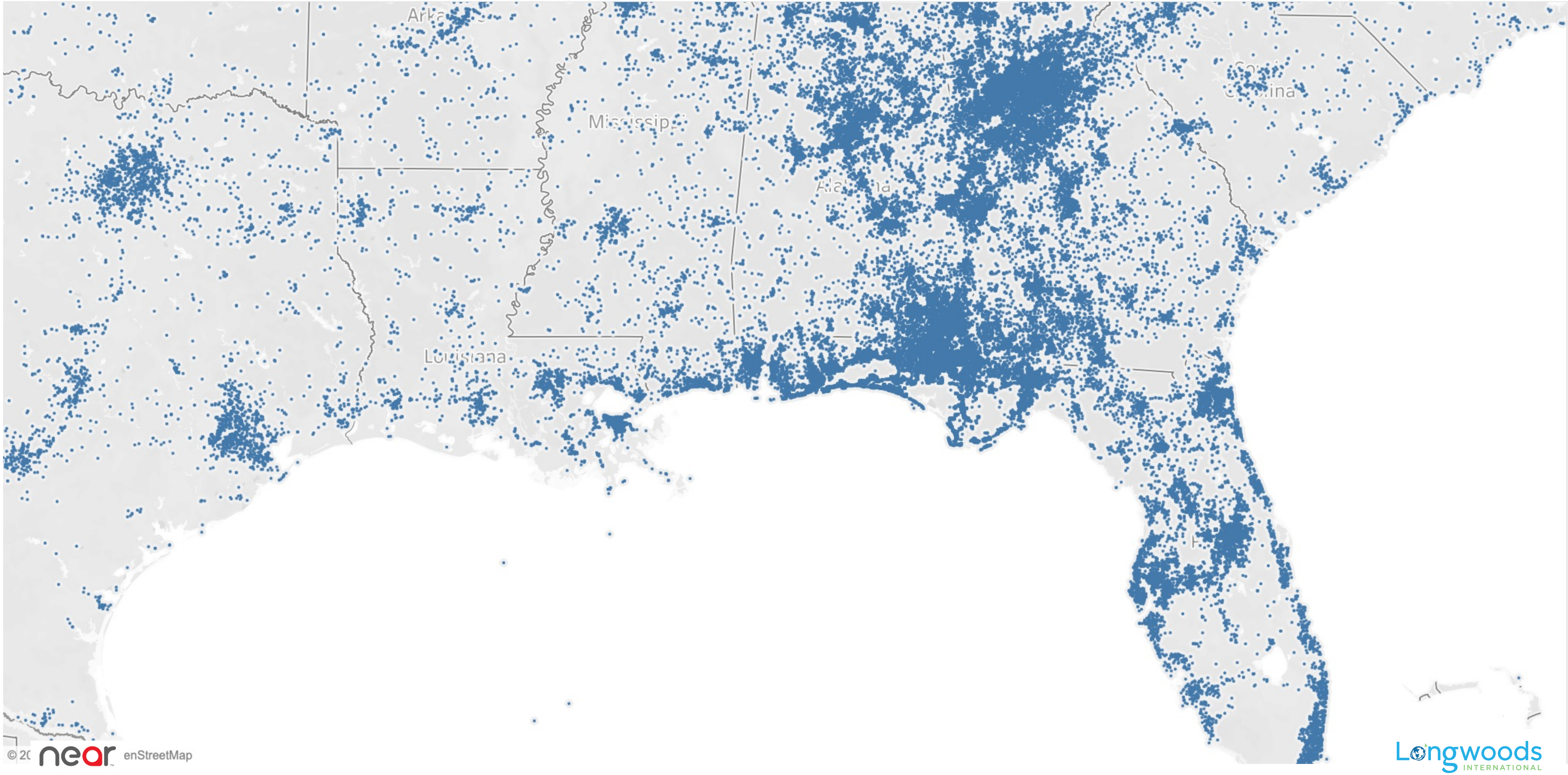


99.7% of those devices are from the U.S.

Panama City Overnight Origin Markets: State

Top 10 States of Origin	Day Visitors
Florida	34.1%
Georgia	18.7%
Alabama	17.8%
Tennessee	5.0%
Texas	3.0%
Kentucky	2.0%
Mississippi	1.8%
Indiana	1.8%
Louisiana	1.7%
Illinois	1.4%

Panama City Unique Day Visitors: October 2020 - September 2021



Panama City Overnight Origin Markets: DMA

Top 10 DMAs of Origin	Day Visitors
Panama City, FL	17.3%
Atlanta, GA	10.0%
Dothan, AL	7.4%
Mobile, AL-Pensacola, FL	7.3%
Tallahassee, FL-Thomasville, GA	6.5%
Birmingham, AL	3.8%
Columbus, GA	3.7%
Nashville, TN	2.6%
Albany, GA	2.1%
Montgomery-Selma, AL	2.0%

Overlap: Percentage of Day Panama City Visitors Who Also Went to Panama City Beach

68.4%

Panama City Day – Panama City Beach Share

Top 10 States of Origin	% of Day Visitors That Went to Panama City Beach	Total Day Visitors
Florida	54.7%	34.1%
Georgia	79.5%	18.7%
Alabama	73.2%	17.8%
Tennessee	82.5%	5.0%
Texas	70.8%	3.0%
Kentucky	85.0%	2.0%
Mississippi	70.2%	1.8%
Indiana	84.7%	1.8%
Louisiana	69.8%	1.7%
Illinois	76.8%	1.4%

Panama City Day – Hotel Share: DMA

Top 10 DMAs of Origin	% of Day Visitors That Went to Panama City Beach	Total Day Visitors
Panama City, FL	55.9%	17.3%
Atlanta, GA	82.2%	10.0%
Dothan, AL	68.4%	7.4%
Mobile, AL-Pensacola, FL	61.9%	7.3%
Tallahassee, FL-Thomasville, GA	58.7%	6.5%
Birmingham, AL	83.6%	3.8%
Columbus, GA	79.7%	3.7%
Nashville, TN	83.2%	2.6%
Albany, GA	75.0%	2.1%
Montgomery-Selma, AL	71.9%	2.0%

Day Repeat Visitation: Average Number of Trips to Panama City

1.8 trips

Average number of trips taken by day visitors to Panama City.

Panama City Day: Trip Share by Month

Month	Total Day Trips
October 2020	6.8%
November 2020	5.6%
December 2020	5.8%
January 2021	6.0%
February 2021	6.9%
March 2021	12.8%
April 2021	12.2%
May 2021	9.6%
June 2021	9.7%
July 2021	12.0%
August 2021	7.0%
September 2021	5.7%

Panama City Day: Day of Trip

Day of Week	Total Day Trips
Monday	13.4%
Tuesday	12.8%
Wednesday	12.8%
Thursday	13.8%
Friday	15.3%
Saturday	19.8%
Sunday	12.0%

Panama City Day: Average Length of Trip

5.8 hours

Panama City Day: Average Length of Trip by Origin States

Top 10 States of Origin	Hours Spent in Panama City	Total Day Visitors
Florida	5.8	34.1%
Georgia	5.8	18.7%
Alabama	6.0	17.8%
Tennessee	5.5	5.0%
Texas	5.6	3.0%
Kentucky	5.3	2.0%
Mississippi	5.6	1.8%
Indiana	5.8	1.8%
Louisiana	5.7	1.7%
Illinois	5.7	1.4%

Panama City Day: Average Length of Trip by Origin DMAs

Top 10 DMAs of Origin	Hours Spent in Panama City	Total Day Visitors
Panama City, FL	5.7	17.3%
Atlanta, GA	5.6	10.0%
Dothan, AL	6.2	7.4%
Mobile, AL-Pensacola, FL	6.0	7.3%
Tallahassee, FL-Thomasville, GA	6.2	6.5%
Birmingham, AL	5.3	3.8%
Columbus, GA	6.0	3.7%
Nashville, TN	5.5	2.6%
Albany, GA	6.0	2.1%
Montgomery-Selma, AL	5.9	2.0%

Panama City Day: Average Length of Trip by Month

Month	Hours in Panama City	Total Day Trips
October 2020	4.9	6.8%
November 2020	5.2	5.6%
December 2020	5.1	5.8%
January 2021	5.9	6.0%
February 2021	7.1	6.9%
March 2021	6.9	12.8%
April 2021	6.2	12.2%
May 2021	5.5	9.6%
June 2021	5.5	9.7%
July 2021	5.4	12.0%
August 2021	5.2	7.0%
September 2021	5.1	5.7%

Panama City Day: Average Length of Trip by Day of Trip

Day of Week	Hours in Panama City	Total Day Trips
Monday	5.8	13.4%
Tuesday	5.6	12.8%
Wednesday	5.6	12.8%
Thursday	5.6	13.8%
Friday	5.6	15.3%
Saturday	6.2	19.8%
Sunday	5.9	12.0%

October 2021 – September 2022 Panama City Hotels Origin Markets

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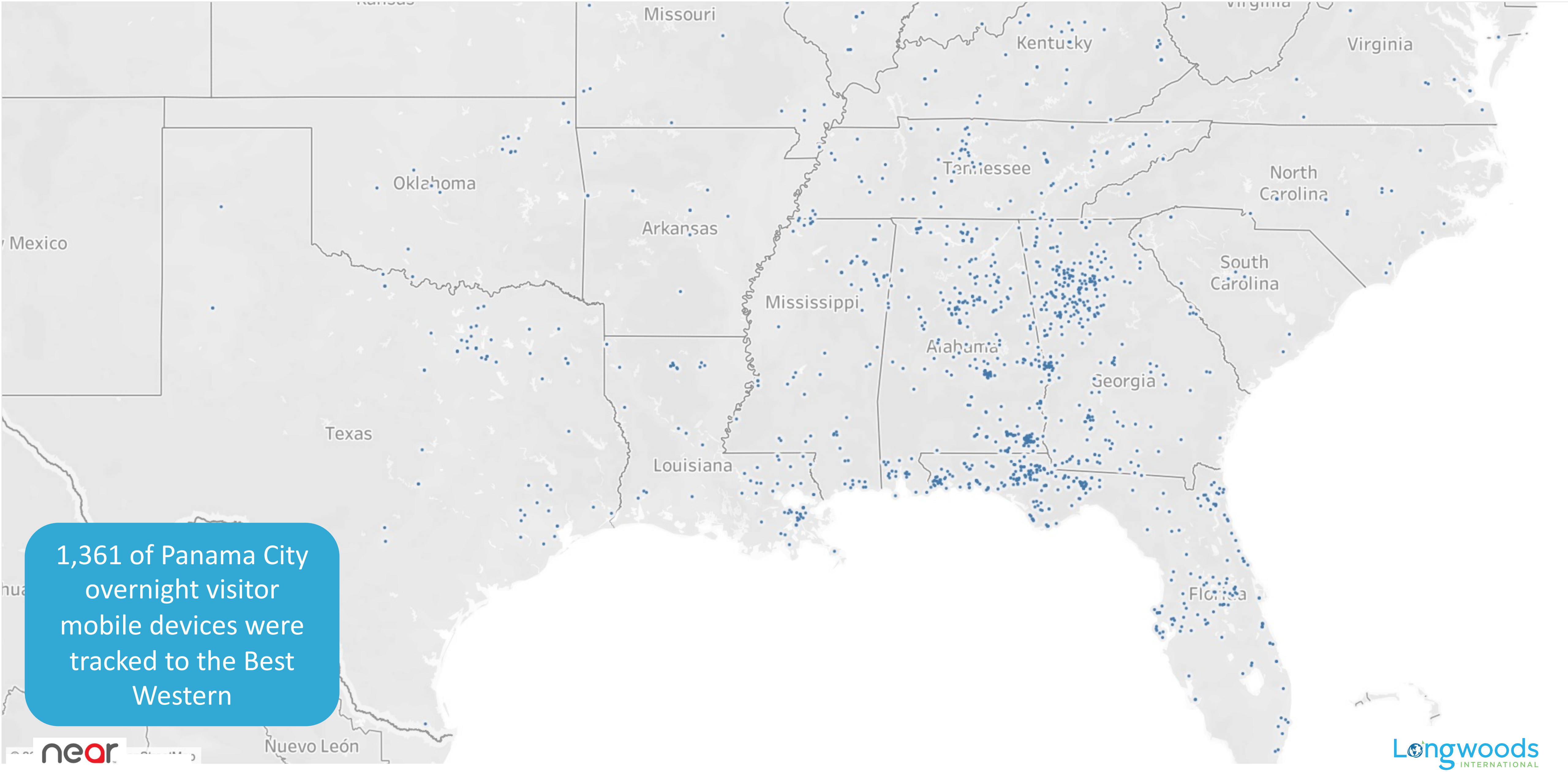
Longwoods INTERNATIONAL

near

Best Western Panama City Visitors



1,361 of Panama City overnight visitor mobile devices were tracked to the Best Western

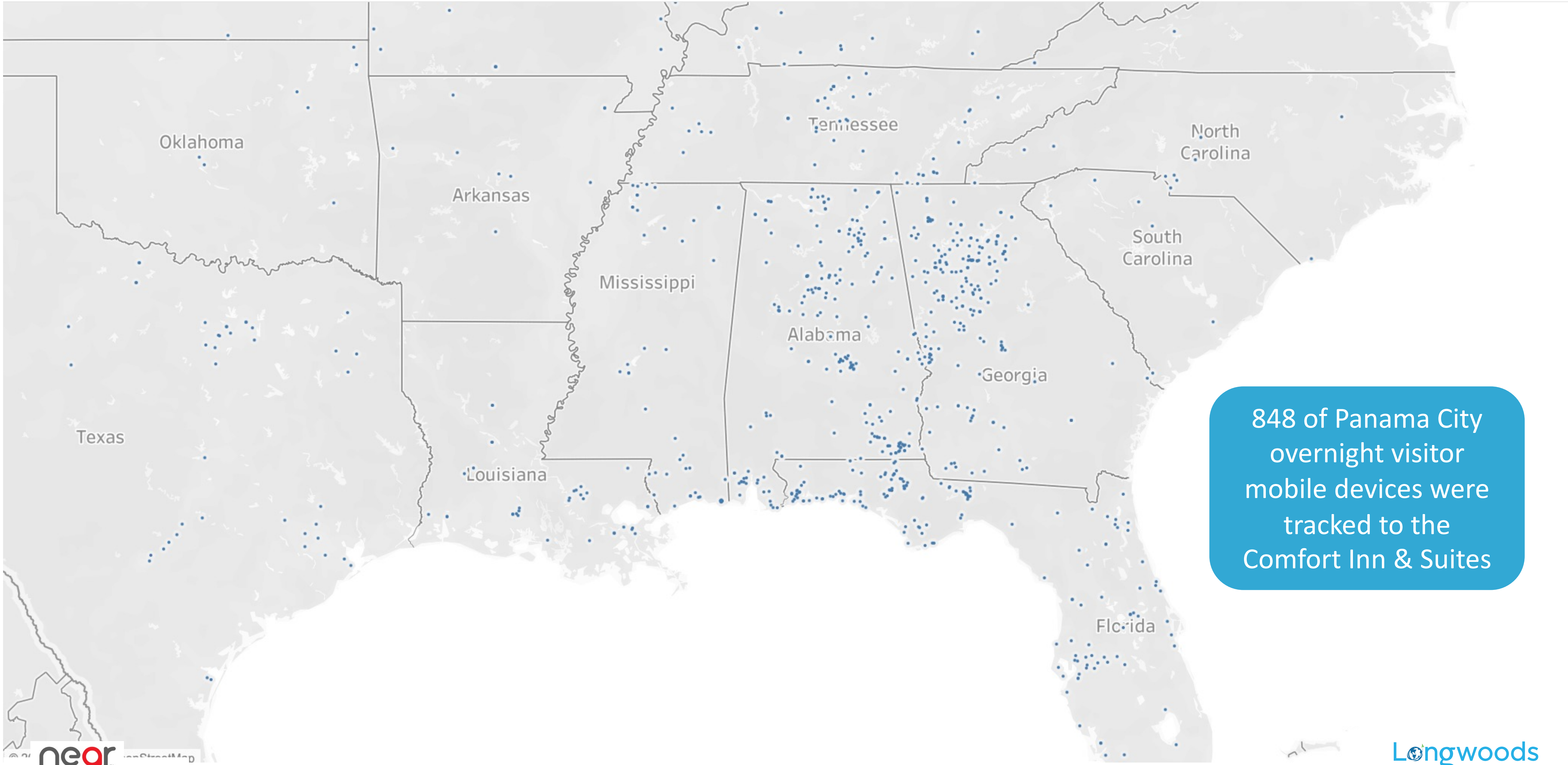
Best Western Panama City Origin Markets: State

Top 10 States of Origin	% of Best Western Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	21.8%	23.9%	27.6%
Alabama	20.7%	19.6%	15.3%
Georgia	20.3%	21.1%	23.1%
Tennessee	5.2%	5.2%	4.9%
Mississippi	4.7%	3.4%	2.4%
Louisiana	4.6%	3.9%	2.6%
Texas	4.5%	4.5%	3.7%
Kentucky	3.2%	2.2%	1.9%
Illinois	2.1%	1.4%	1.4%
Indiana	1.8%	1.4%	1.6%

Best Western Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Best Western Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	12.8%	12.8%	14.3%
Panama City, FL	7.1%	8.2%	11.2%
Birmingham, AL	5.4%	5.5%	4.3%
Dothan, AL	4.8%	4.3%	4.1%
Mobile, AL-Pensacola, FL	4.6%	6.5%	5.3%
Tallahassee, FL-Thomasville, GA	4.2%	4.4%	4.6%
Columbus, GA	3.9%	3.7%	3.6%
Montgomery-Selma, AL	3.7%	3.2%	2.0%
Orlando-Daytona Beach-Melbourne, FL	3.0%	2.6%	2.8%
Huntsville-Decatur, AL	2.5%	2.2%	1.5%

Comfort Inn & Suites Panama City Visitors



848 of Panama City overnight visitor mobile devices were tracked to the Comfort Inn & Suites

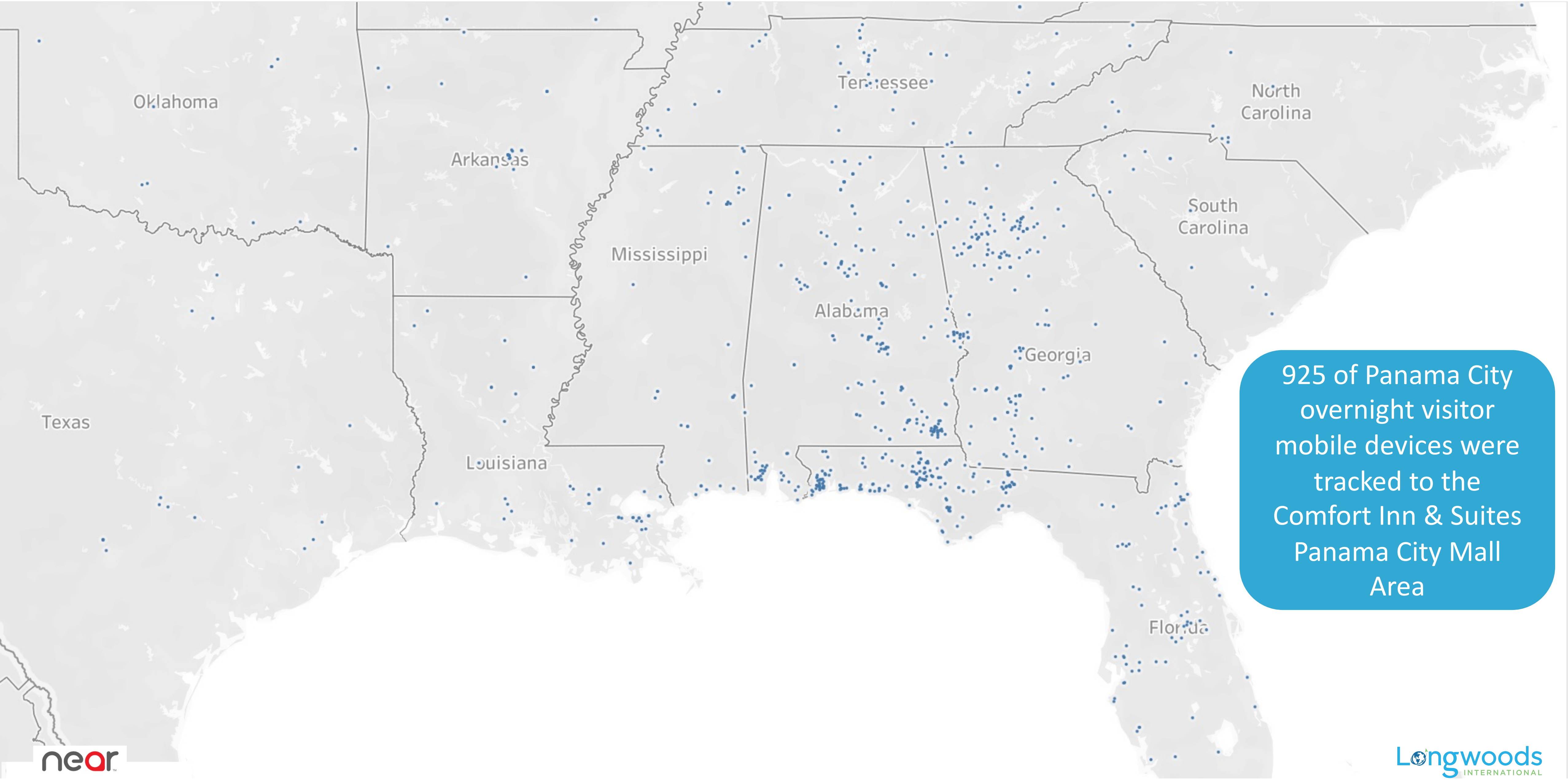
Comfort Inn & Suites Panama City Origin Markets: State

Top 10 States of Origin	% of Comfort I&S Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Alabama	23.5%	19.6%	15.3%
Georgia	22.1%	21.1%	23.1%
Florida	18.8%	23.9%	27.6%
Mississippi	5.7%	3.4%	2.4%
Tennessee	5.4%	5.2%	4.9%
Texas	5.0%	4.5%	3.7%
Louisiana	4.0%	3.9%	2.6%
Kentucky	2.1%	2.2%	1.9%
Indiana	1.5%	1.4%	1.6%
Missouri	1.3%	1.3%	1.3%

Comfort Inn & Suites Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Comfort I&S Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	15.4%	12.8%	14.3%
Mobile, AL-Pensacola, FL	6.5%	6.5%	5.3%
Birmingham, AL	6.4%	5.5%	4.3%
Panama City, FL	5.7%	8.2%	11.2%
Huntsville-Decatur (Florence), AL	4.5%	2.2%	1.5%
Dothan, AL	4.2%	4.3%	4.1%
Montgomery-Selma, AL	3.8%	3.2%	2.0%
Columbus, GA	3.3%	3.7%	3.6%
Nashville, TN	3.2%	2.6%	2.3%
Tallahassee, FL-Thomasville, GA	3.2%	4.4%	4.6%
Tampa-St. Petersburg, FL	3.1%	2.4%	2.6%

Comfort Inn & Suites Panama City Mall Area Visitors



925 of Panama City overnight visitor mobile devices were tracked to the Comfort Inn & Suites Panama City Mall Area

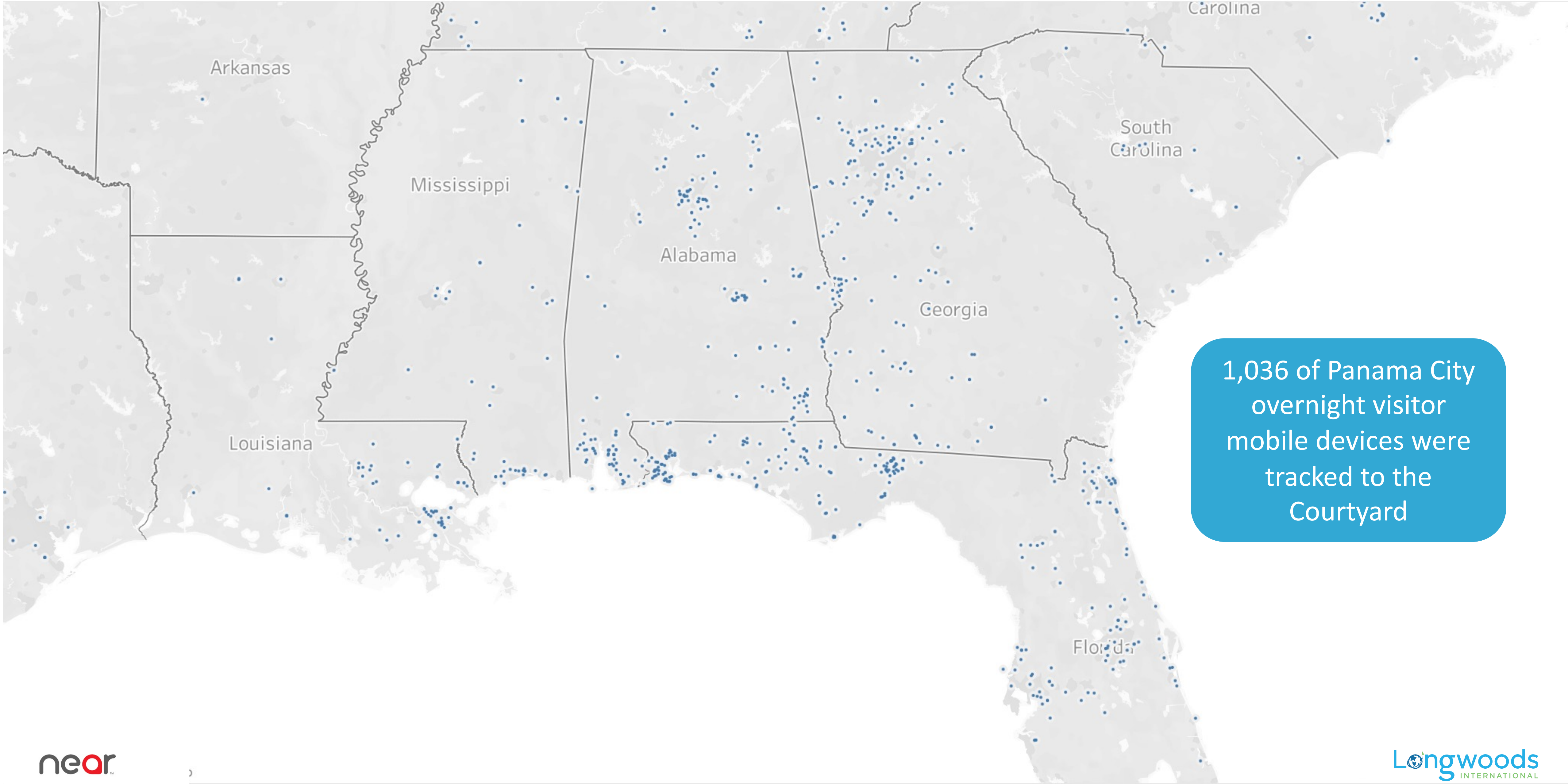
Comfort Inn Mall Area Panama City Origin Markets: State

Top 10 States of Origin	% of Comfort Mall Area Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	26.2%	23.9%	27.6%
Alabama	21.8%	19.6%	15.3%
Georgia	18.3%	21.1%	23.1%
Tennessee	5.1%	5.2%	4.9%
Mississippi	4.6%	3.4%	2.4%
Louisiana	4.3%	3.9%	2.6%
Kentucky	2.9%	2.2%	1.9%
Arkansas	2.5%	1.3%	1.0%
Texas	2.1%	4.5%	3.7%
Missouri	1.5%	1.3%	1.3%

Comfort Inn Mall Area Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Comfort Mall Area Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	9.9%	12.8%	14.3%
Panama City, FL	9.5%	8.2%	11.2%
Mobile, AL-Pensacola, FL	9.3%	6.5%	5.3%
Montgomery-Selma, AL	5.2%	3.2%	2.0%
Birmingham, AL	4.8%	5.5%	4.3%
Dothan, AL	4.8%	4.3%	4.1%
Tallahassee, FL-Thomasville, GA	4.2%	4.4%	4.6%
Columbus, GA	3.2%	3.7%	3.6%
Nashville, TN	3.0%	2.6%	2.3%
Albany, GA	2.6%	2.0%	2.1%

Courtyard Panama City Visitors



1,036 of Panama City overnight visitor mobile devices were tracked to the Courtyard

near

Longwoods INTERNATIONAL

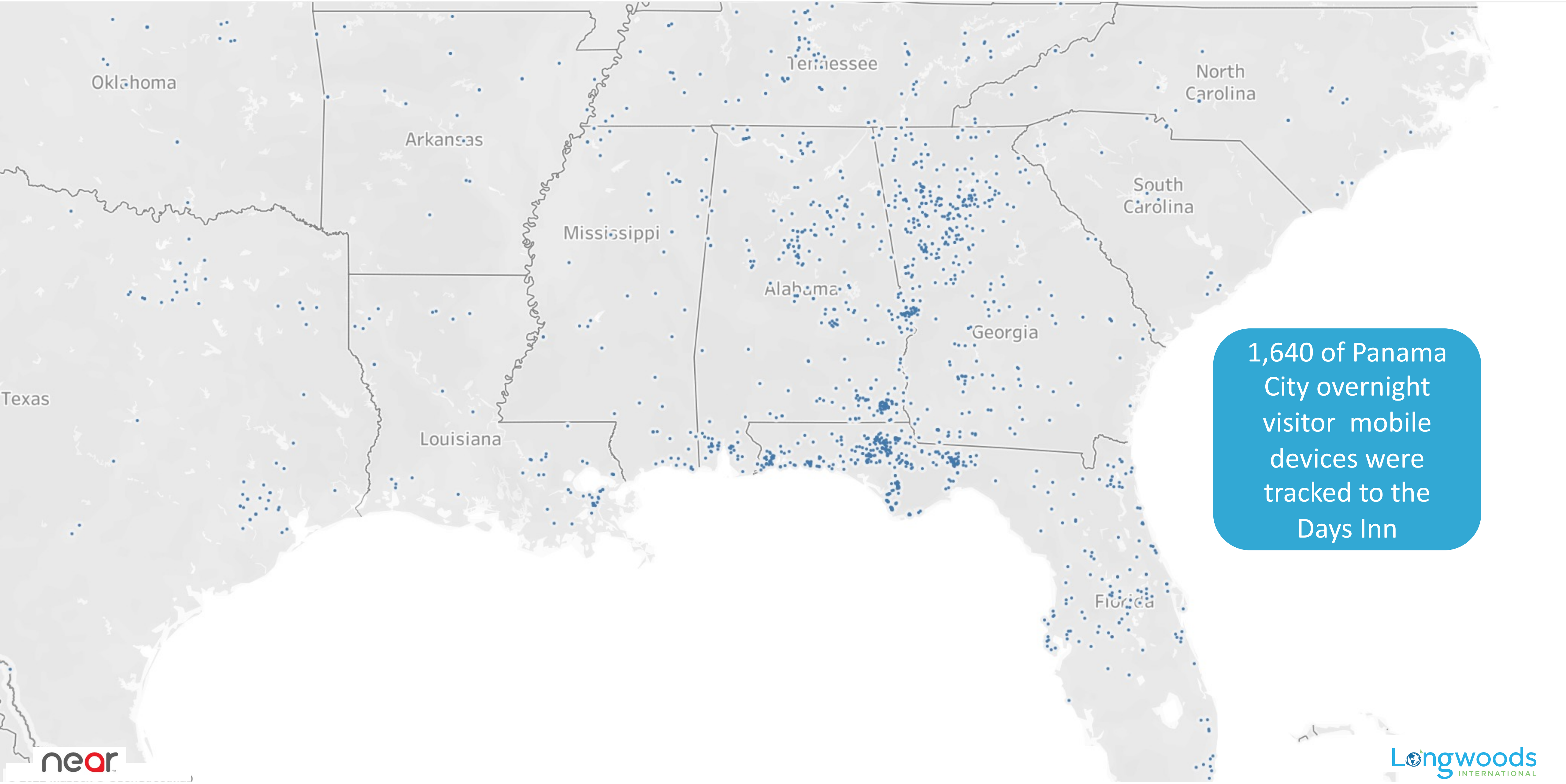
Courtyard Panama City Origin Markets: State

Top 10 States of Origin	% of Courtyard Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	26.8%	23.9%	27.6%
Alabama	17.9%	19.6%	15.3%
Georgia	17.0%	21.1%	23.1%
Tennessee	5.9%	5.2%	4.9%
Louisiana	5.7%	3.9%	2.6%
Mississippi	4.5%	3.4%	2.4%
Texas	3.9%	4.5%	3.7%
Kentucky	1.6%	2.2%	1.9%
North Carolina	1.6%	1.1%	1.6%
South Carolina	1.4%	1.1%	1.3%

Courtyard Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Courtyard Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	10.5%	12.8%	14.3%
Mobile, AL-Pensacola, FL	10.1%	6.5%	5.3%
Birmingham, AL	5.7%	5.5%	4.3%
Panama City, FL	5.7%	8.2%	11.2%
Tallahassee, FL-Thomasville, GA	5.7%	4.4%	4.6%
New Orleans, LA	4.1%	2.0%	1.4%
Columbus, GA	3.9%	3.7%	3.6%
Orlando-Daytona Beach-Melbourne, FL	3.5%	2.6%	2.8%
Nashville, TN	3.4%	2.6%	2.3%
Tampa-St. Petersburg, FL	3.0%	2.4%	2.6%
Jacksonville, FL	2.7%	1.9%	2.2%

Days Inn Panama City Visitors



1,640 of Panama City overnight visitor mobile devices were tracked to the Days Inn

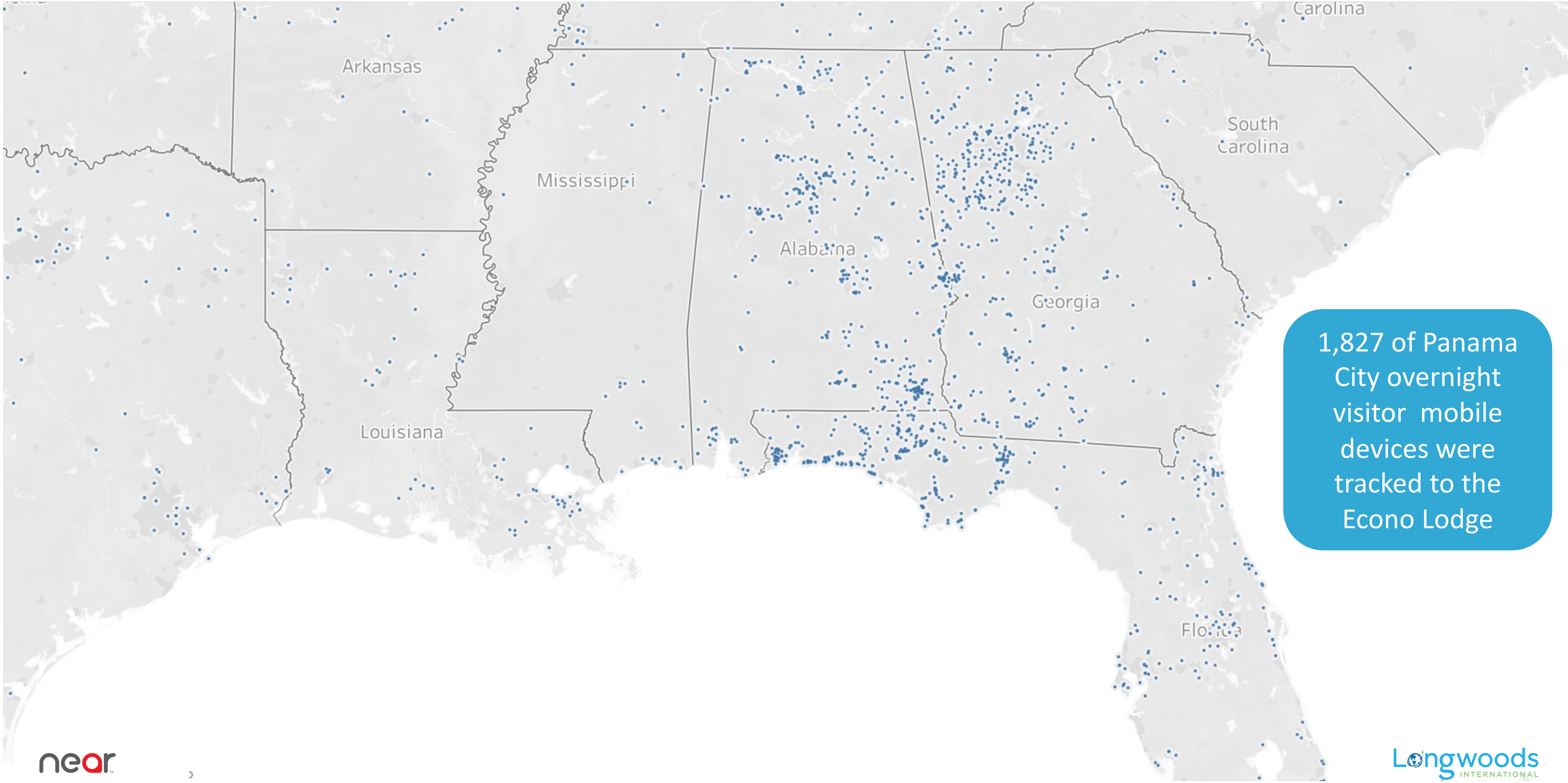
Days Inn Panama City Origin Markets: State

Top 10 States of Origin	% of Days Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	27.7%	23.9%	27.6%
Georgia	20.6%	21.1%	23.1%
Alabama	18.5%	19.6%	15.3%
Tennessee	5.1%	5.2%	4.9%
Texas	3.8%	4.5%	3.7%
Louisiana	3.4%	3.9%	2.6%
Mississippi	3.4%	3.4%	2.4%
Kentucky	2.1%	2.2%	1.9%
North Carolina	1.6%	1.1%	1.6%
Arkansas	1.3%	1.3%	1.0%

Days Inn Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Days Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	12.7%	12.8%	14.3%
Panama City, FL	12.7%	8.2%	11.2%
Mobile, AL-Pensacola, FL	5.7%	6.5%	5.3%
Birmingham, AL	5.0%	5.5%	4.3%
Dothan, AL	5.0%	4.3%	4.1%
Tallahassee, FL-Thomasville, GA	5.0%	4.4%	4.6%
Columbus, GA	3.7%	3.7%	3.6%
Orlando-Daytona Beach-Melbourne, FL	2.8%	2.6%	2.8%
Nashville, TN	2.6%	2.6%	2.3%
Montgomery-Selma, AL	2.3%	3.2%	2.0%

Econo Lodge Panama City Visitors



1,827 of Panama City overnight visitor mobile devices were tracked to the Econo Lodge

near

Longwoods INTERNATIONAL

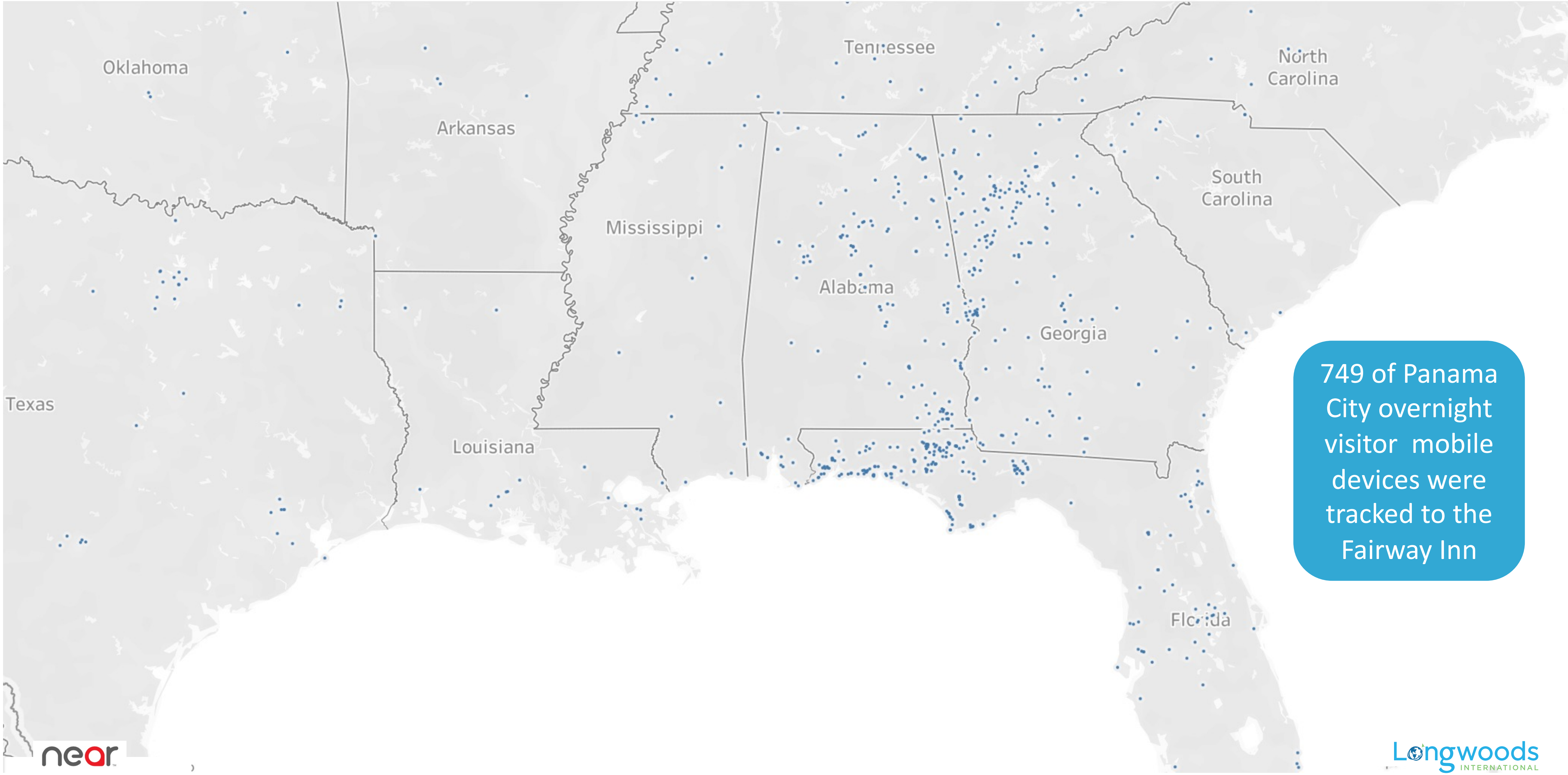
Econo Lodge Panama City Origin Markets: State

Top 10 States of Origin	% of Econo Lodge Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	23.2%	23.9%	27.6%
Georgia	22.9%	21.1%	23.1%
Alabama	22.1%	19.6%	15.3%
Tennessee	4.6%	5.2%	4.9%
Texas	3.8%	4.5%	3.7%
Louisiana	3.2%	3.9%	2.6%
Indiana	2.2%	1.4%	1.6%
Kentucky	1.8%	2.2%	1.9%
Mississippi	1.7%	3.4%	2.4%
Arkansas	1.3%	1.3%	1.0%

Econo Lodge Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Econo Lodge Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	13.5%	12.8%	14.3%
Panama City, FL	9.2%	8.2%	11.2%
Birmingham, AL	7.5%	5.5%	4.3%
Mobile, AL-Pensacola, FL	5.3%	6.5%	5.3%
Dothan, AL	5.0%	4.3%	4.1%
Tallahassee, FL-Thomasville, GA	4.4%	4.4%	4.6%
Columbus, GA	4.3%	3.7%	3.6%
Montgomery-Selma, AL	3.5%	3.2%	2.0%
Huntsville-Decatur, AL	2.8%	2.2%	1.5%
Orlando-Daytona Beach-Melbourne, FL	2.2%	2.6%	2.8%

Fairway Inn Panama City Visitors



749 of Panama City overnight visitor mobile devices were tracked to the Fairway Inn

near

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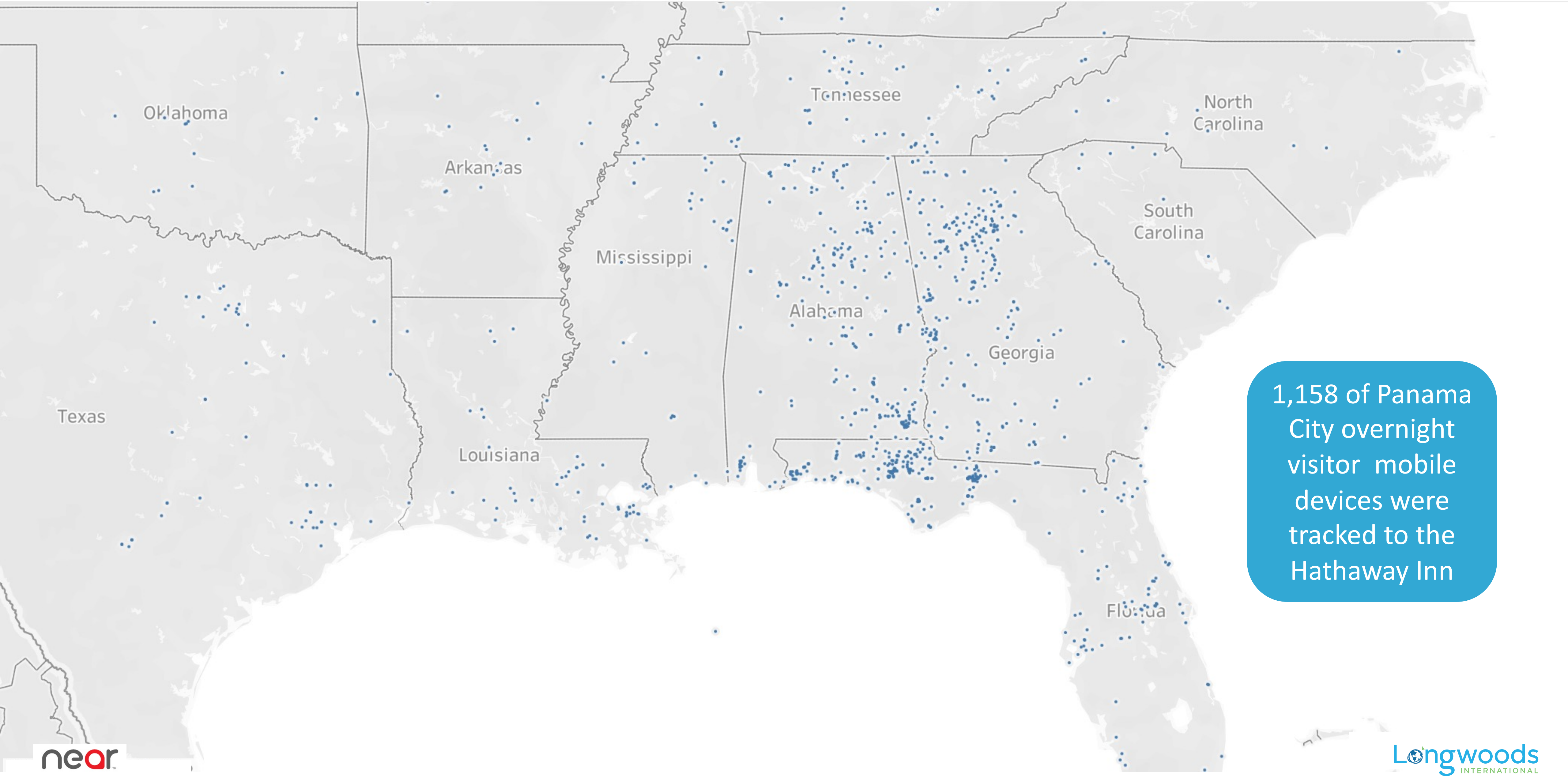
Fairway Inn Panama City Origin Markets: State

Top 10 States of Origin	% of Fairway Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	28.8%	23.9%	27.6%
Georgia	21.9%	21.1%	23.1%
Alabama	18.7%	19.6%	15.3%
Texas	4.3%	4.5%	3.7%
Tennessee	3.9%	5.2%	4.9%
Kentucky	2.7%	2.2%	1.9%
Louisiana	2.0%	3.9%	2.6%
Mississippi	2.0%	3.4%	2.4%
Ohio	1.7%	1.2%	1.4%
South Carolina	1.7%	1.1%	1.3%

Fairway Inn Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Fairway Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	13.8%	12.8%	14.3%
Panama City, FL	13.0%	8.2%	11.2%
Mobile, AL-Pensacola, FL	8.1%	6.5%	5.3%
Birmingham, AL	6.4%	5.5%	4.3%
Columbus, GA	4.4%	3.7%	3.6%
Dothan, AL	3.7%	4.3%	4.1%
Tallahassee, FL-Thomasville, GA	3.6%	4.4%	4.6%
Montgomery-Selma, AL	2.5%	3.2%	2.0%
Huntsville-Decatur, AL	2.3%	2.2%	1.5%
Orlando-Daytona Beach-Melbourne, FL	2.3%	2.6%	2.8%

Hathaway Inn Panama City Visitors



1,158 of Panama City overnight visitor mobile devices were tracked to the Hathaway Inn

near

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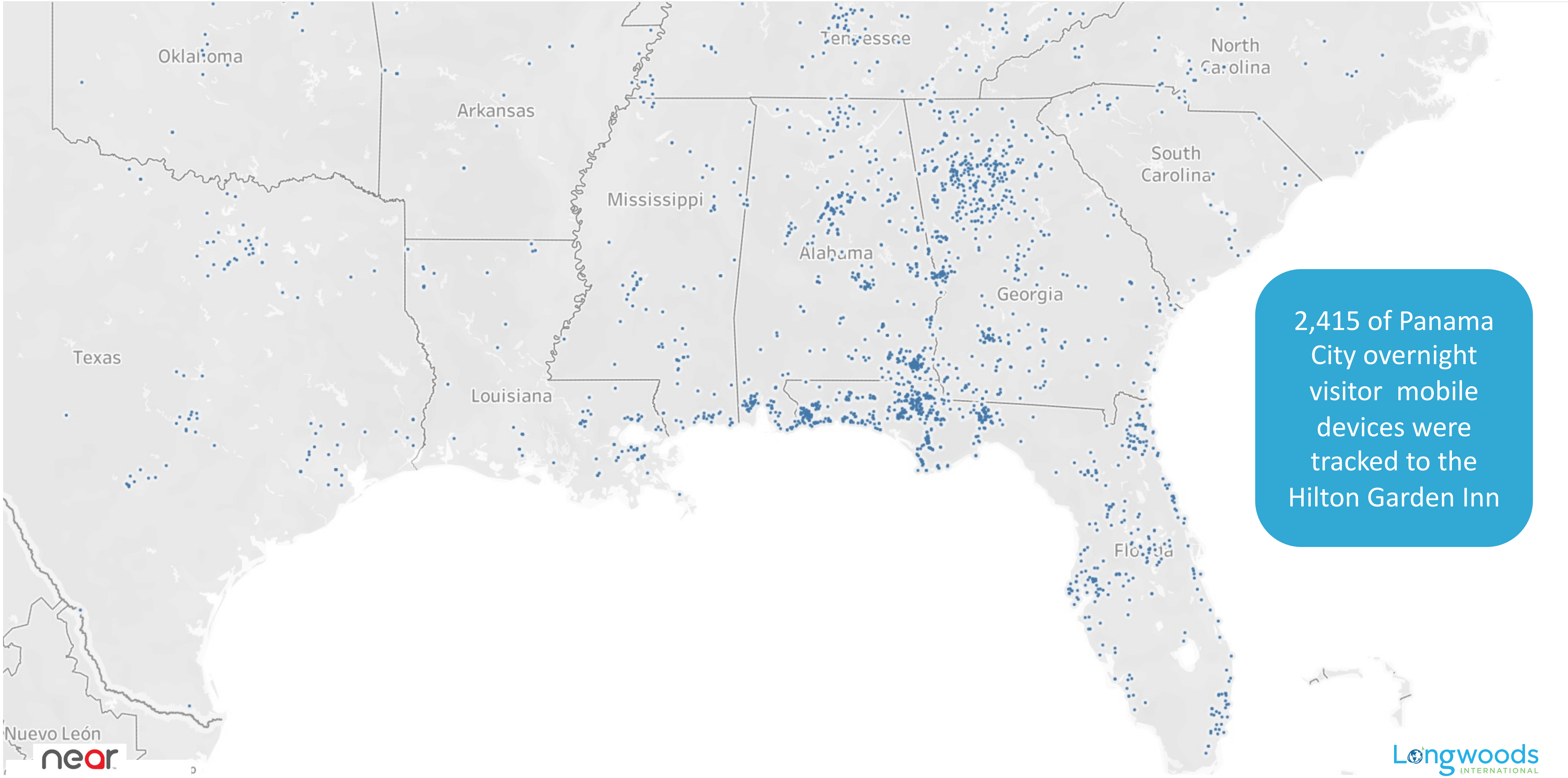
Hathaway Inn Panama City Origin Markets: State

Top 10 States of Origin	% of Hathaway Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	24.1%	23.9%	27.6%
Georgia	21.7%	21.1%	23.1%
Alabama	20.8%	19.6%	15.3%
Tennessee	5.8%	5.2%	4.9%
Louisiana	4.4%	3.9%	2.6%
Texas	4.3%	4.5%	3.7%
Kentucky	3.4%	2.2%	1.9%
Mississippi	2.8%	3.4%	2.4%
Missouri	1.5%	1.3%	1.3%
Arkansas	1.4%	1.3%	1.0%

Hathaway Inn Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Hathaway Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	13.4%	12.8%	14.3%
Panama City, FL	10.4%	8.2%	11.2%
Birmingham, AL	6.1%	5.5%	4.3%
Tallahassee, FL-Thomasville, GA	5.9%	4.4%	4.6%
Dothan, AL	5.2%	4.3%	4.1%
Mobile, AL-Pensacola, FL	5.0%	6.5%	5.3%
Columbus, GA	3.6%	3.7%	3.6%
Huntsville-Decatur, AL	3.1%	2.2%	1.5%
Montgomery-Selma, AL	2.9%	3.2%	2.0%
Orlando-Daytona Beach-Melbourne, FL	2.6%	2.6%	2.8%

Hilton Garden Inn Panama City Visitors



2,415 of Panama City overnight visitor mobile devices were tracked to the Hilton Garden Inn

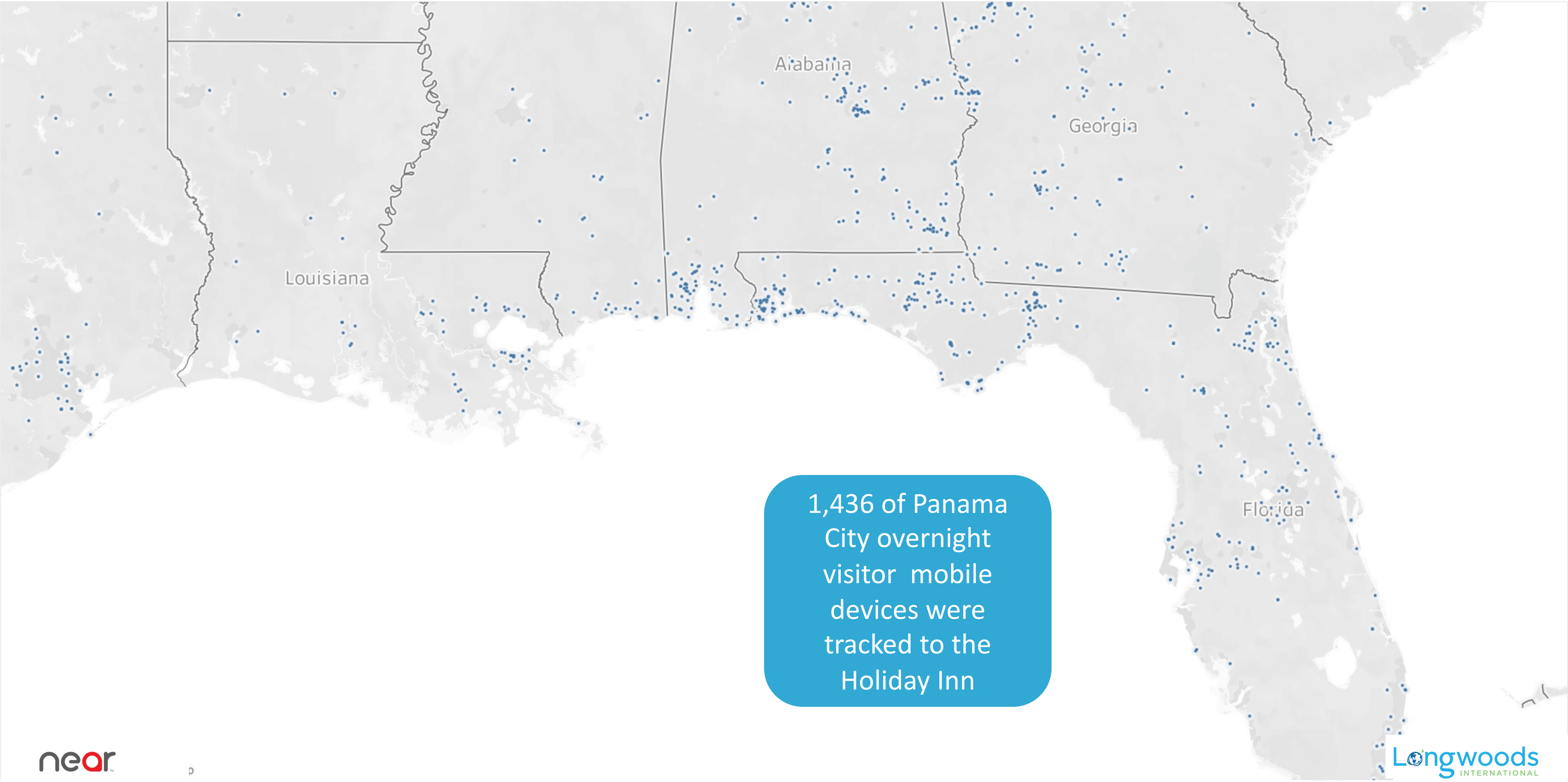
Hilton Garden Inn Panama City Origin Markets: State

Top 10 States of Origin	% of Hilton Garden Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	30.1%	23.9%	27.6%
Georgia	19.7%	21.1%	23.1%
Alabama	18.1%	19.6%	15.3%
Tennessee	4.3%	5.2%	4.9%
Texas	4.1%	4.5%	3.7%
Mississippi	3.7%	3.4%	2.4%
Louisiana	3.1%	3.9%	2.6%
Kentucky	2.7%	2.2%	1.9%
South Carolina	1.3%	1.1%	1.3%
North Carolina	1.2%	1.1%	1.6%

Hilton Garden Inn Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Hilton Garden Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	11.7%	12.8%	14.3%
Panama City, FL	11.4%	8.2%	11.2%
Mobile, AL-Pensacola, FL	7.9%	6.5%	5.3%
Dothan, AL	5.1%	4.3%	4.1%
Birmingham, AL	4.4%	5.5%	4.3%
Tallahassee, FL-Thomasville, GA	4.1%	4.4%	4.6%
Columbus, GA	3.0%	3.7%	3.6%
Orlando-Daytona Beach-Melbourne, FL	2.8%	2.6%	2.8%
Montgomery-Selma, AL	2.7%	3.2%	2.0%
Tampa-St. Petersburg, FL	2.7%	2.4%	2.6%

Holiday Inn Panama City Visitors



near

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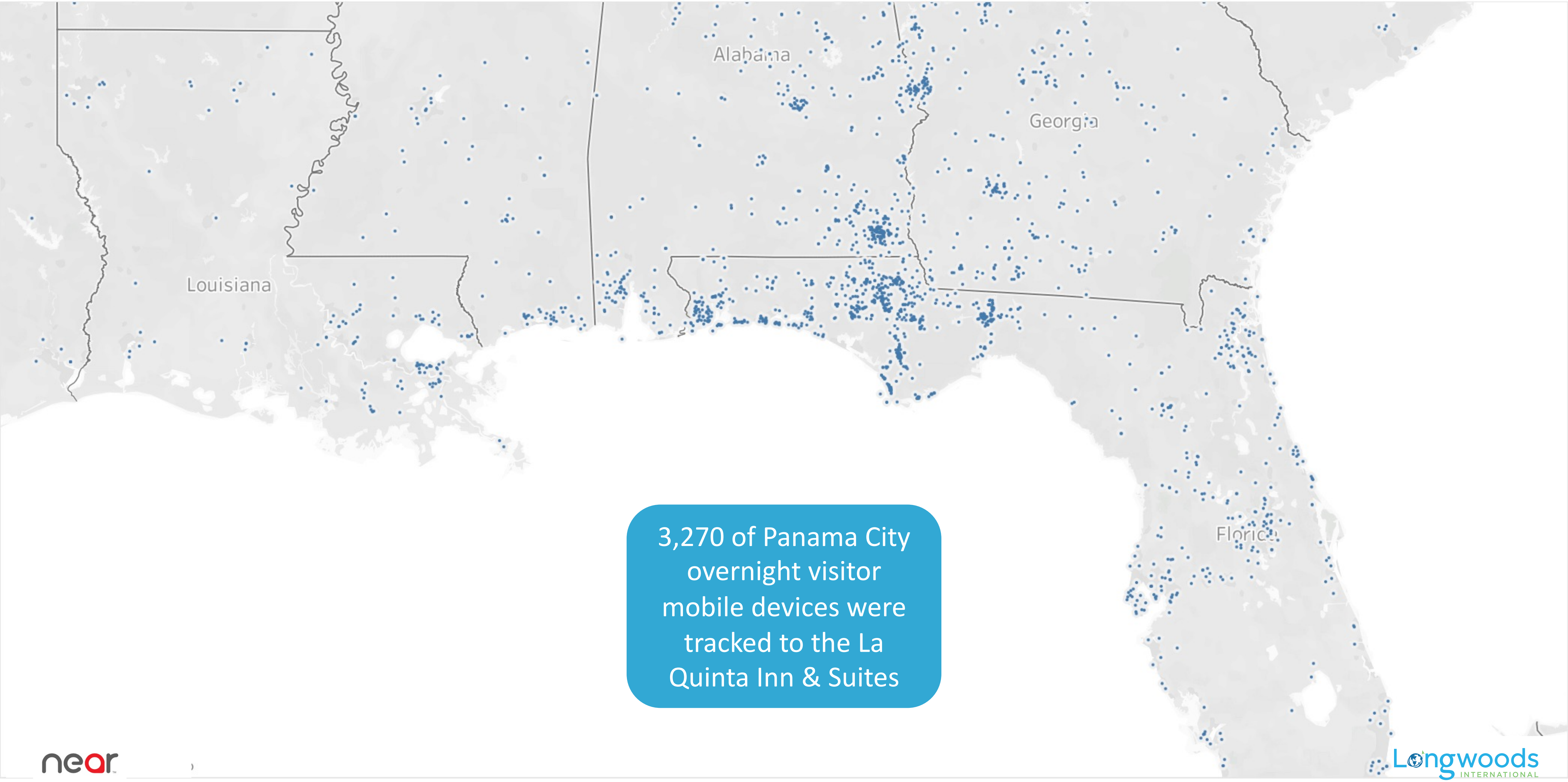
Holiday Inn Panama City Origin Markets: State

Top 10 States of Origin	% of Holiday Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	22.8%	23.9%	27.6%
Alabama	20.2%	19.6%	15.3%
Georgia	18.2%	21.1%	23.1%
Texas	7.8%	4.5%	3.7%
Tennessee	5.1%	5.2%	4.9%
Louisiana	3.8%	3.9%	2.6%
Mississippi	2.9%	3.4%	2.4%
Arkansas	2.4%	1.3%	1.0%
Illinois	1.7%	1.4%	1.4%
Kentucky	1.6%	2.2%	1.9%

Holiday Inn Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Holiday Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	11.6%	12.8%	14.3%
Mobile, AL-Pensacola, FL	8.6%	6.5%	5.3%
Panama City, FL	5.5%	8.2%	11.2%
Birmingham, AL	5.0%	5.5%	4.3%
Montgomery-Selma, AL	4.3%	3.2%	2.0%
Tallahassee, FL-Thomasville, GA	4.0%	4.4%	4.6%
Tampa-St. Petersburg, FL	2.9%	2.4%	2.6%
Columbus, GA	2.8%	3.7%	3.6%
Nashville, TN	2.8%	2.6%	2.3%
Dothan, AL	2.7%	4.3%	4.1%

La Quinta Inn & Suites Panama City Visitors



3,270 of Panama City overnight visitor mobile devices were tracked to the La Quinta Inn & Suites

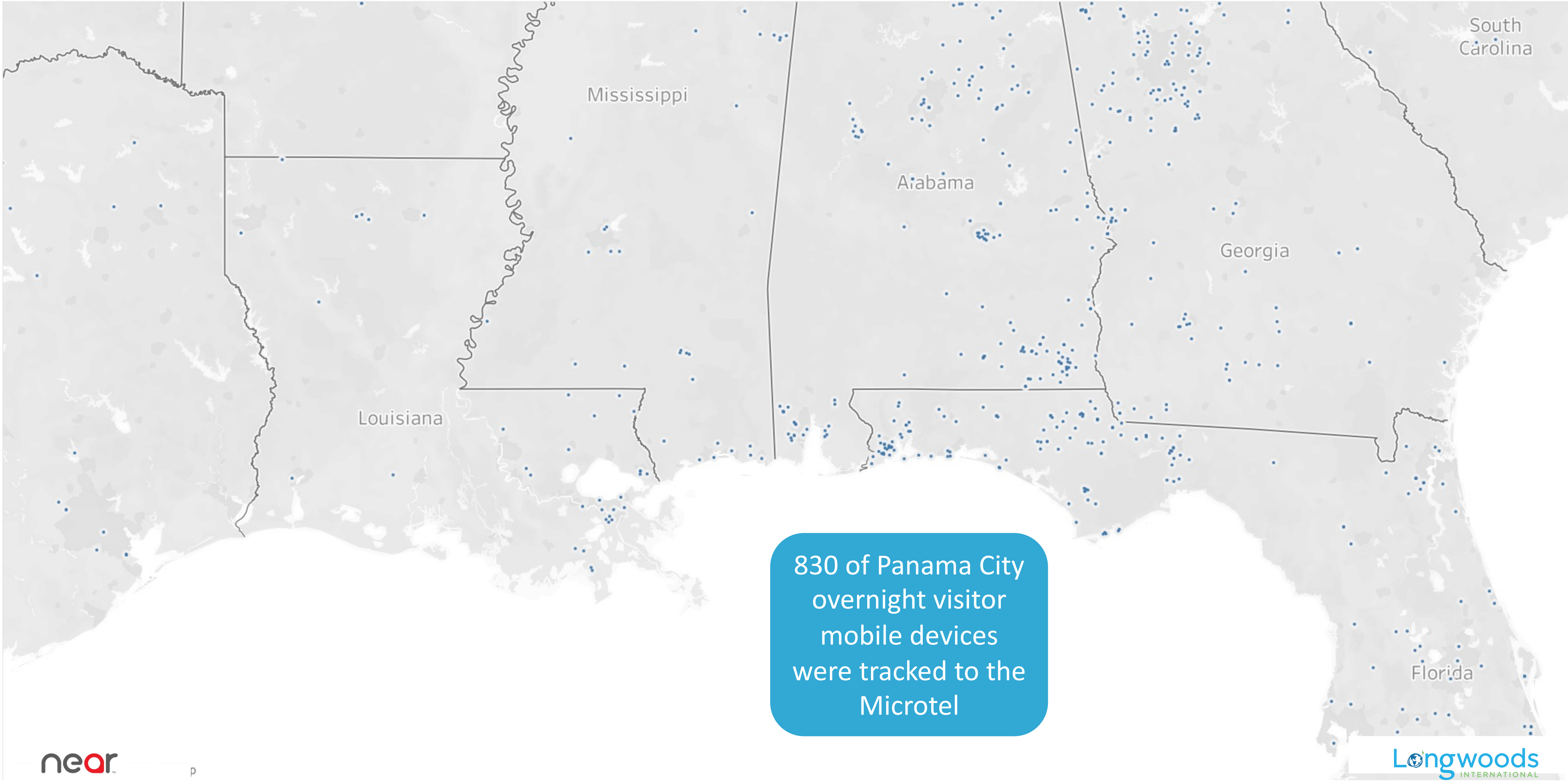
La Quinta Inn & Suites Panama City Origin Markets: State

Top 10 States of Origin	% of La Quinta Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	31.3%	23.9%	27.6%
Georgia	20.1%	21.1%	23.1%
Alabama	17.4%	19.6%	15.3%
Tennessee	4.2%	5.2%	4.9%
Texas	3.8%	4.5%	3.7%
Louisiana	3.5%	3.9%	2.6%
Mississippi	3.4%	3.4%	2.4%
Kentucky	2.2%	2.2%	1.9%
North Carolina	1.7%	1.1%	1.6%
Illinois	1.4%	1.4%	1.4%

La Quinta Inn & Suites Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of La Quinta Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Panama City, FL	14.1%	8.2%	11.2%
Atlanta, GA	11.7%	12.8%	14.3%
Mobile, AL-Pensacola, FL	6.3%	6.5%	5.3%
Dothan, AL	5.2%	4.3%	4.1%
Tallahassee, FL-Thomasville, GA	4.9%	4.4%	4.6%
Birmingham, AL	3.6%	5.5%	4.3%
Columbus, GA	3.5%	3.7%	3.6%
Orlando-Daytona Beach-Melbourne, FL	2.8%	2.6%	2.8%
Montgomery-Selma, AL	2.8%	3.2%	2.0%
Jacksonville, FL	2.5%	1.9%	2.2%

Microtel Panama City Visitors



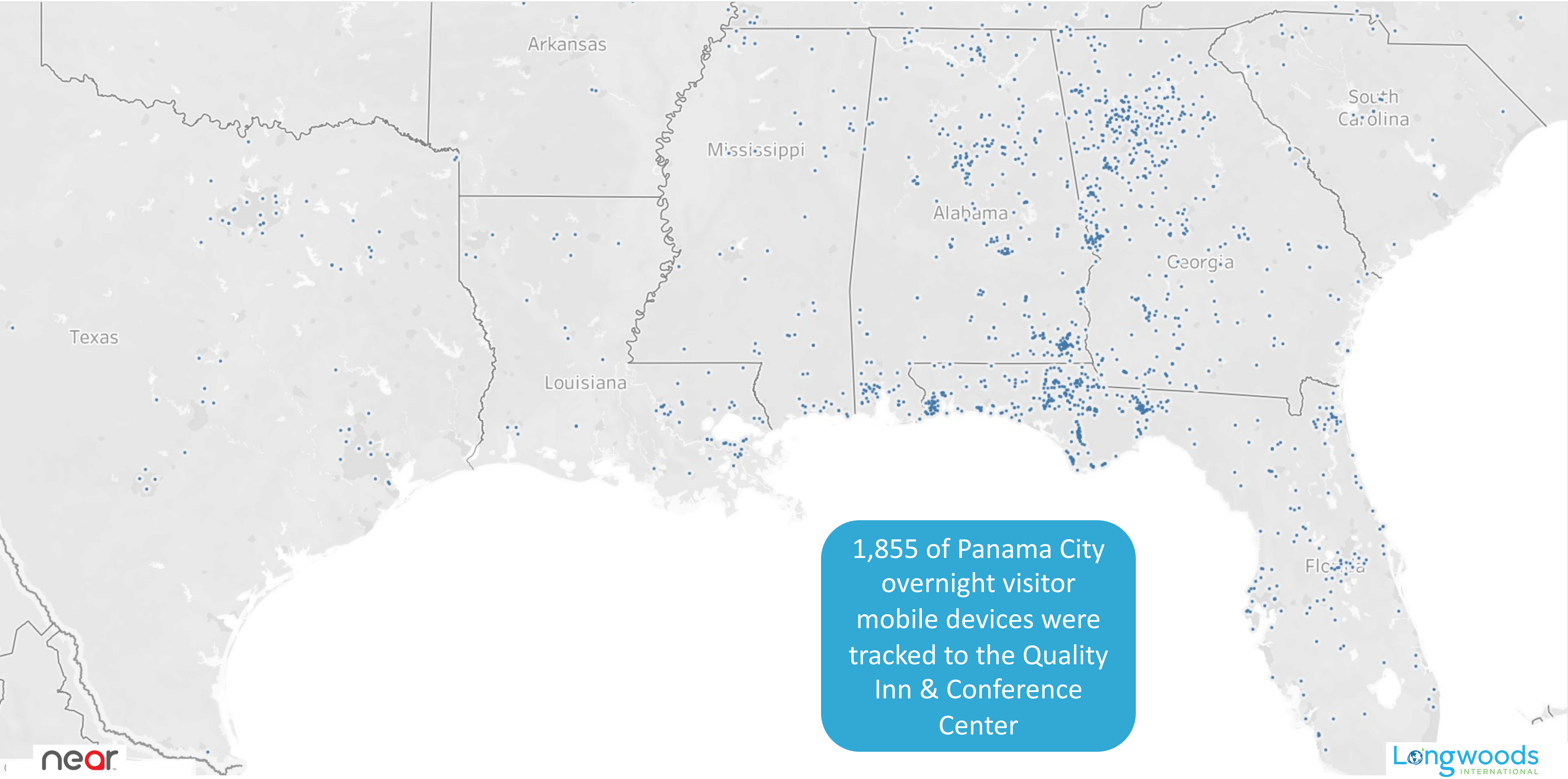
Microtel Panama City Origin Markets: State

Top 10 States of Origin	% of Microtel Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	22.9%	23.9%	27.6%
Alabama	22.0%	19.6%	15.3%
Georgia	18.2%	21.1%	23.1%
Tennessee	5.7%	5.2%	4.9%
Texas	4.6%	4.5%	3.7%
Louisiana	4.5%	3.9%	2.6%
Mississippi	4.2%	3.4%	2.4%
Illinois	2.1%	1.4%	1.4%
Kentucky	2.1%	2.2%	1.9%
Oklahoma	1.9%	0.8%	0.7%

Microtel Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Microtel Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	11.2%	12.8%	14.3%
Mobile, AL-Pensacola, FL	8.1%	6.5%	5.3%
Panama City, FL	6.7%	8.2%	11.2%
Dothan, AL	6.1%	4.3%	4.1%
Birmingham, AL	5.6%	5.5%	4.3%
Columbus, GA	3.2%	3.7%	3.6%
Montgomery-Selma, AL	3.2%	3.2%	2.0%
Huntsville-Decatur, AL	3.1%	2.2%	1.5%
Tallahassee, FL-Thomasville, GA	3.1%	4.4%	4.6%
New Orleans, LA	3.0%	2.0%	1.4%

Quality Inn & Conference Center Panama City Visitors



1,855 of Panama City overnight visitor mobile devices were tracked to the Quality Inn & Conference Center

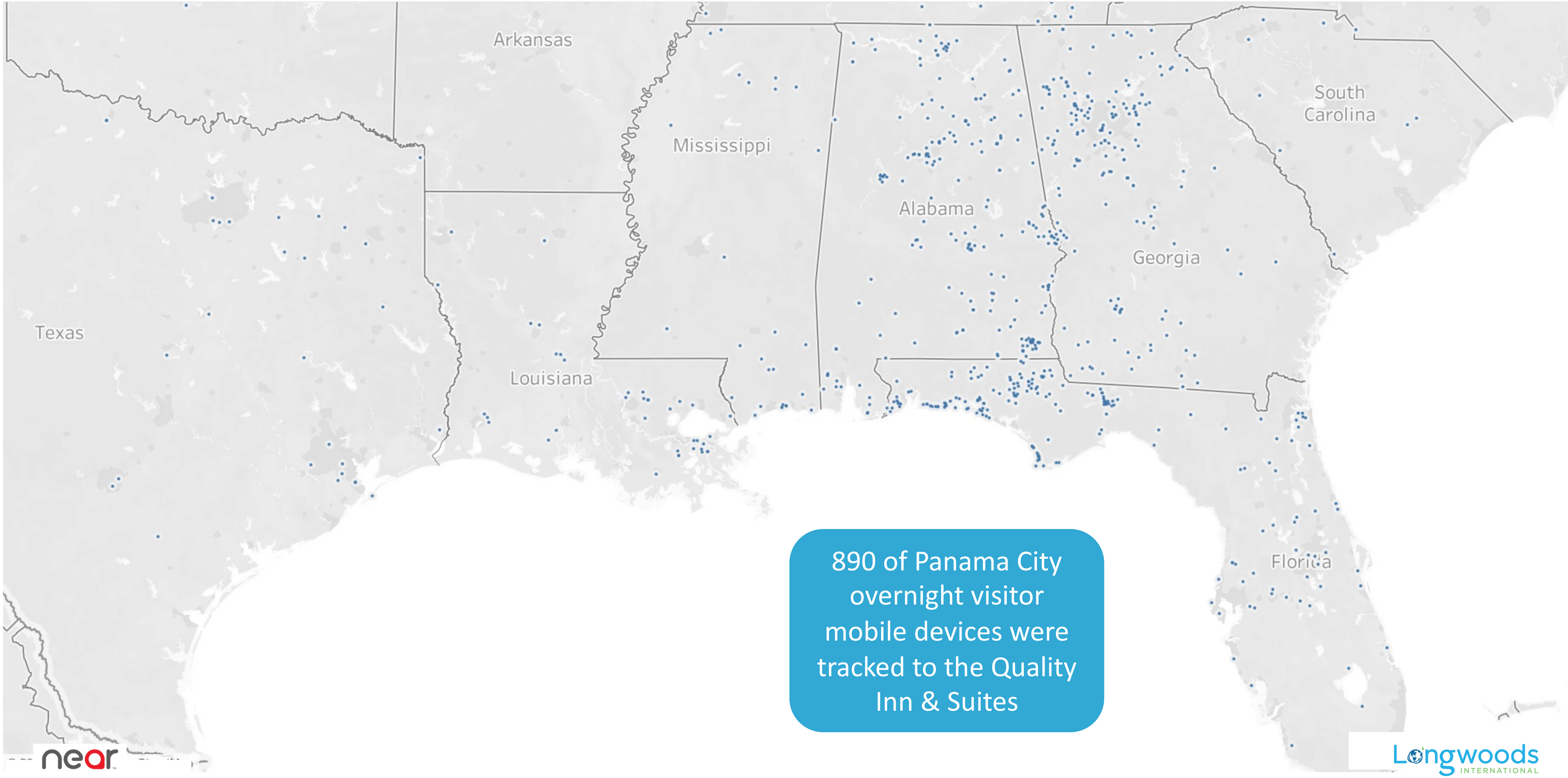
Quality Inn & Conference Center Panama City Origin Markets: State

Top 10 States of Origin	% of Quality Conference Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	26.4%	23.9%	27.6%
Georgia	23.6%	21.1%	23.1%
Alabama	19.1%	19.6%	15.3%
Tennessee	4.7%	5.2%	4.9%
Texas	3.5%	4.5%	3.7%
Mississippi	3.2%	3.4%	2.4%
Louisiana	3.2%	3.9%	2.6%
Kentucky	1.9%	2.2%	1.9%
North Carolina	1.6%	1.1%	1.6%
Indiana	1.5%	1.4%	1.6%

Quality Inn & Conference Center Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Quality Conference Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	13.8%	12.8%	14.3%
Panama City, FL	11.8%	8.2%	11.2%
Mobile, AL-Pensacola, FL	5.9%	6.5%	5.3%
Birmingham, AL	5.2%	5.5%	4.3%
Tallahassee, FL-Thomasville, GA	5.1%	4.4%	4.6%
Dothan, AL	4.9%	4.3%	4.1%
Columbus, GA	3.7%	3.7%	3.6%
Montgomery-Selma, AL	3.0%	3.2%	2.0%
Jacksonville, FL	2.2%	1.9%	2.2%
Huntsville-Decatur, AL	2.1%	2.2%	1.5%

Quality Inn & Suites Panama City Visitors



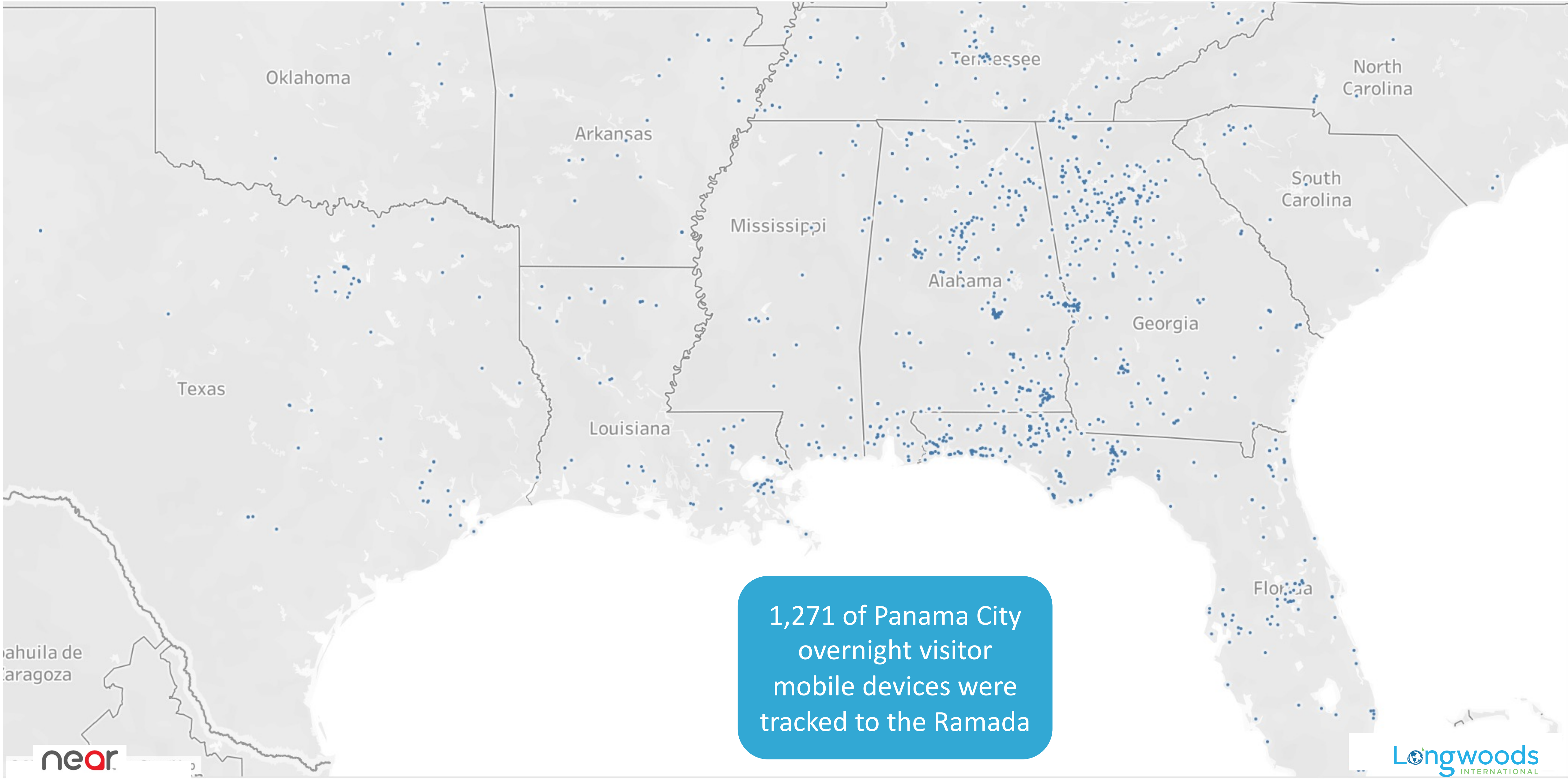
Quality Inn & Suites Panama City Origin Markets: State

Top 10 States of Origin	% of Quality Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Alabama	24.2%	19.6%	15.3%
Florida	22.0%	23.9%	27.6%
Georgia	19.1%	21.1%	23.1%
Tennessee	5.3%	5.2%	4.9%
Kentucky	4.7%	2.2%	1.9%
Louisiana	4.2%	3.9%	2.6%
Texas	3.4%	4.5%	3.7%
Mississippi	3.0%	3.4%	2.4%
Missouri	1.6%	1.3%	1.3%
Ohio	1.6%	1.2%	1.4%

Quality Inn & Suites Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Quality Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	12.4%	12.8%	14.3%
Panama City, FL	9.4%	8.2%	11.2%
Birmingham, AL	7.4%	5.5%	4.3%
Mobile, AL-Pensacola, FL	6.2%	6.5%	5.3%
Tallahassee, FL-Thomasville, GA	4.5%	4.4%	4.6%
Montgomery-Selma, AL	4.2%	3.2%	2.0%
Dothan, AL	4.0%	4.3%	4.1%
Columbus, GA	3.6%	3.7%	3.6%
Huntsville-Decatur, AL	2.8%	2.2%	1.5%
Nashville, TN	2.8%	2.6%	2.3%

Ramada Panama City Visitors



1,271 of Panama City overnight visitor mobile devices were tracked to the Ramada

Ramada Panama City Origin Markets: State

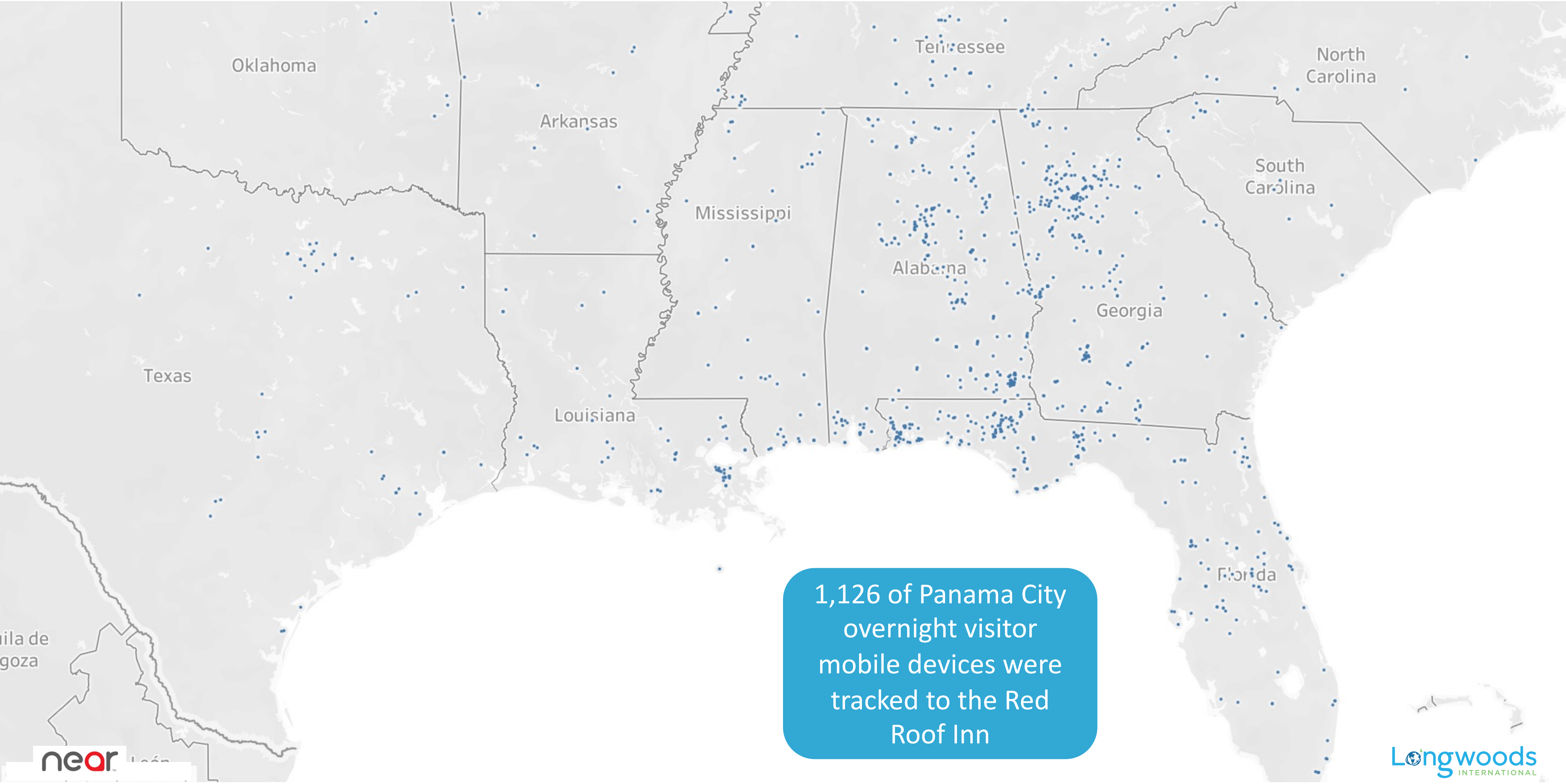
Top 10 States of Origin	% of Ramada Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Alabama	23.4%	19.6%	15.3%
Florida	19.8%	23.9%	27.6%
Georgia	19.5%	21.1%	23.1%
Tennessee	7.2%	5.2%	4.9%
Louisiana	4.7%	3.9%	2.6%
Texas	4.5%	4.5%	3.7%
Mississippi	2.8%	3.4%	2.4%
Arkansas	2.0%	1.3%	1.0%
Kentucky	2.0%	2.2%	1.9%
Illinois	1.9%	1.4%	1.4%

Longwoods INTERNATIONAL near

Ramada Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Ramada Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	12.0%	12.8%	14.3%
Birmingham, AL	7.3%	5.5%	4.3%
Mobile, AL-Pensacola, FL	6.6%	6.5%	5.3%
Panama City, FL	6.2%	8.2%	11.2%
Montgomery-Selma, AL	4.2%	3.2%	2.0%
Columbus, GA	4.1%	3.7%	3.6%
Tallahassee, FL-Thomasville, GA	3.9%	4.4%	4.6%
Dothan, AL	3.6%	4.3%	4.1%
Nashville, TN	3.3%	2.6%	2.3%
Huntsville-Decatur, AL	2.8%	2.2%	1.5%

Red Roof Inn Panama City Visitors



1,126 of Panama City overnight visitor mobile devices were tracked to the Red Roof Inn

near

Longwoods INTERNATIONAL

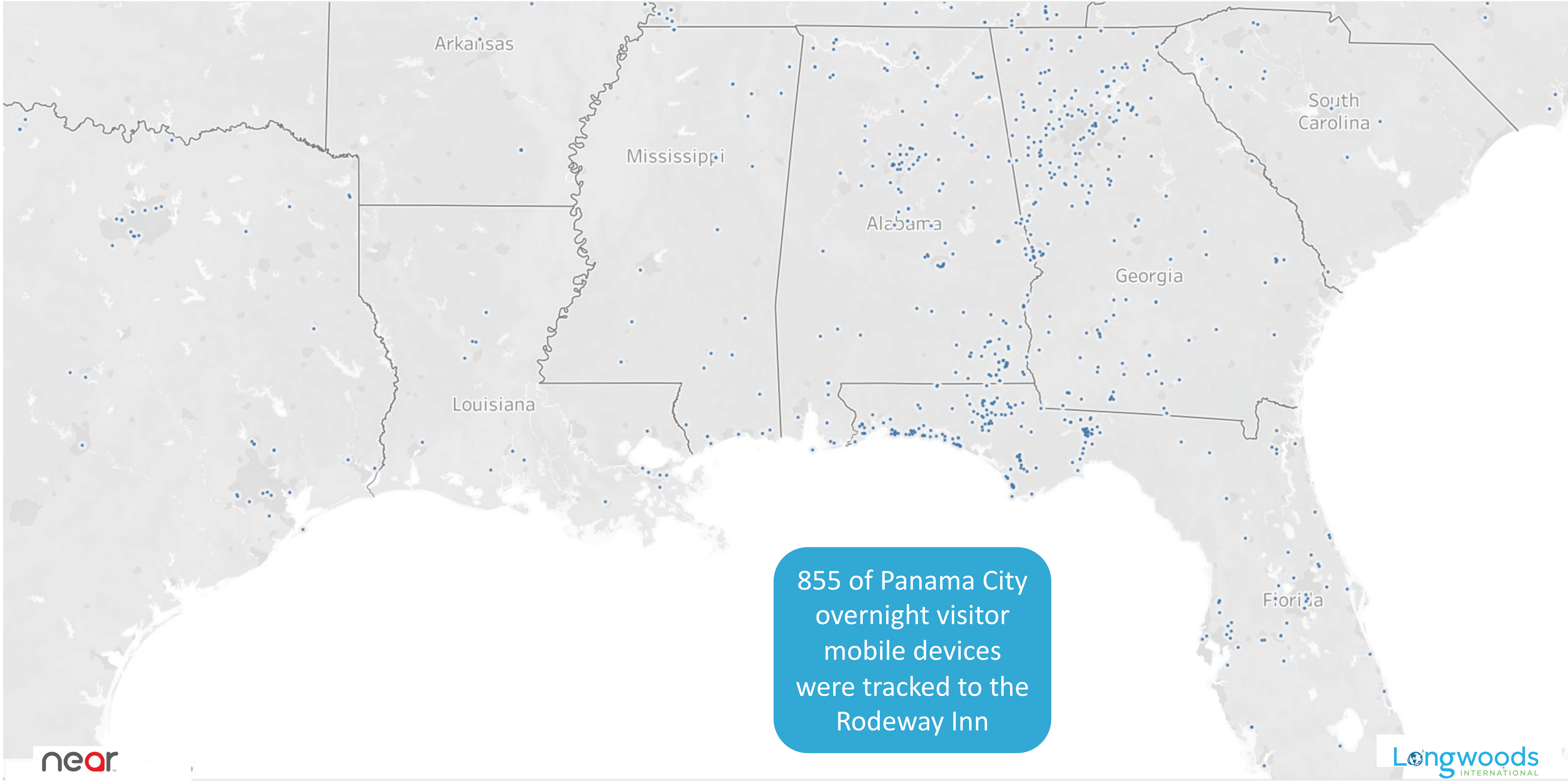
Red Roof Inn Panama City Origin Markets: State

Top 10 States of Origin	% of Red Roof Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Alabama	22.6%	19.6%	15.3%
Florida	21.0%	23.9%	27.6%
Georgia	21.0%	21.1%	23.1%
Louisiana	5.1%	3.9%	2.6%
Tennessee	4.6%	5.2%	4.9%
Mississippi	4.2%	3.4%	2.4%
Texas	3.9%	4.5%	3.7%
Kentucky	2.8%	2.2%	1.9%
Illinois	1.7%	1.4%	1.4%
Missouri	1.7%	1.3%	1.3%

Red Roof Inn Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Red Roof Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	11.9%	12.8%	14.3%
Birmingham, AL	7.4%	5.5%	4.3%
Panama City, FL	7.1%	8.2%	11.2%
Mobile, AL-Pensacola, FL	6.6%	6.5%	5.3%
Dothan, AL	5.2%	4.3%	4.1%
Tallahassee, FL-Thomasville, GA	3.8%	4.4%	4.6%
Montgomery-Selma, AL	3.6%	3.2%	2.0%
Nashville, TN	3.1%	2.6%	2.3%
Columbus, GA	2.8%	3.7%	3.6%
Orlando-Daytona Beach-Melbourne, FL	2.7%	2.6%	2.8%

Rodeway Inn Panama City Visitors



855 of Panama City overnight visitor mobile devices were tracked to the Rodeway Inn

near

Longwoods INTERNATIONAL

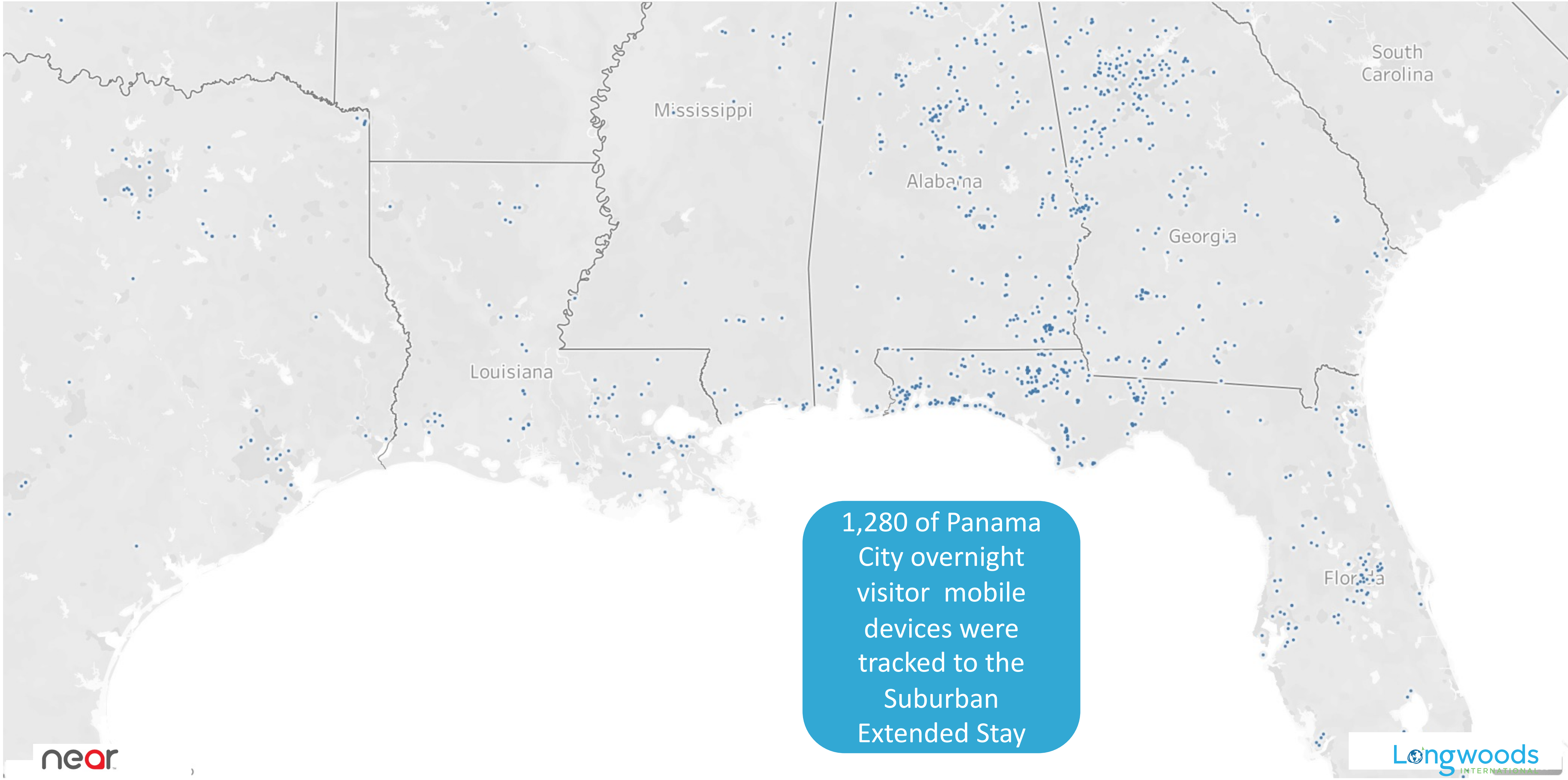
Rodeway Inn Panama City Origin Markets: State

Top 10 States of Origin	% of Rodeway Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	24.3%	23.9%	27.6%
Georgia	22.0%	21.1%	23.1%
Alabama	18.6%	19.6%	15.3%
Tennessee	6.4%	5.2%	4.9%
Texas	5.0%	4.5%	3.7%
Mississippi	3.2%	3.4%	2.4%
Kentucky	1.9%	2.2%	1.9%
Louisiana	1.8%	3.9%	2.6%
Arkansas	1.6%	1.3%	1.0%
Michigan	1.6%	0.7%	0.8%

Rodeway Inn Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Rodeway Inn Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	13.8%	12.8%	14.3%
Panama City, FL	9.9%	8.2%	11.2%
Tallahassee, FL-Thomasville, GA	5.8%	4.4%	4.6%
Birmingham, AL	5.5%	5.5%	4.3%
Mobile, AL-Pensacola, FL	5.5%	6.5%	5.3%
Dothan, AL	4.6%	4.3%	4.1%
Columbus, GA	3.6%	3.7%	3.6%
Huntsville-Decatur, AL	2.8%	2.2%	1.5%
Nashville, TN	2.6%	2.6%	2.3%
Chattanooga, TN	2.5%	1.5%	1.5%

Suburban Extended Stay Panama City Visitors



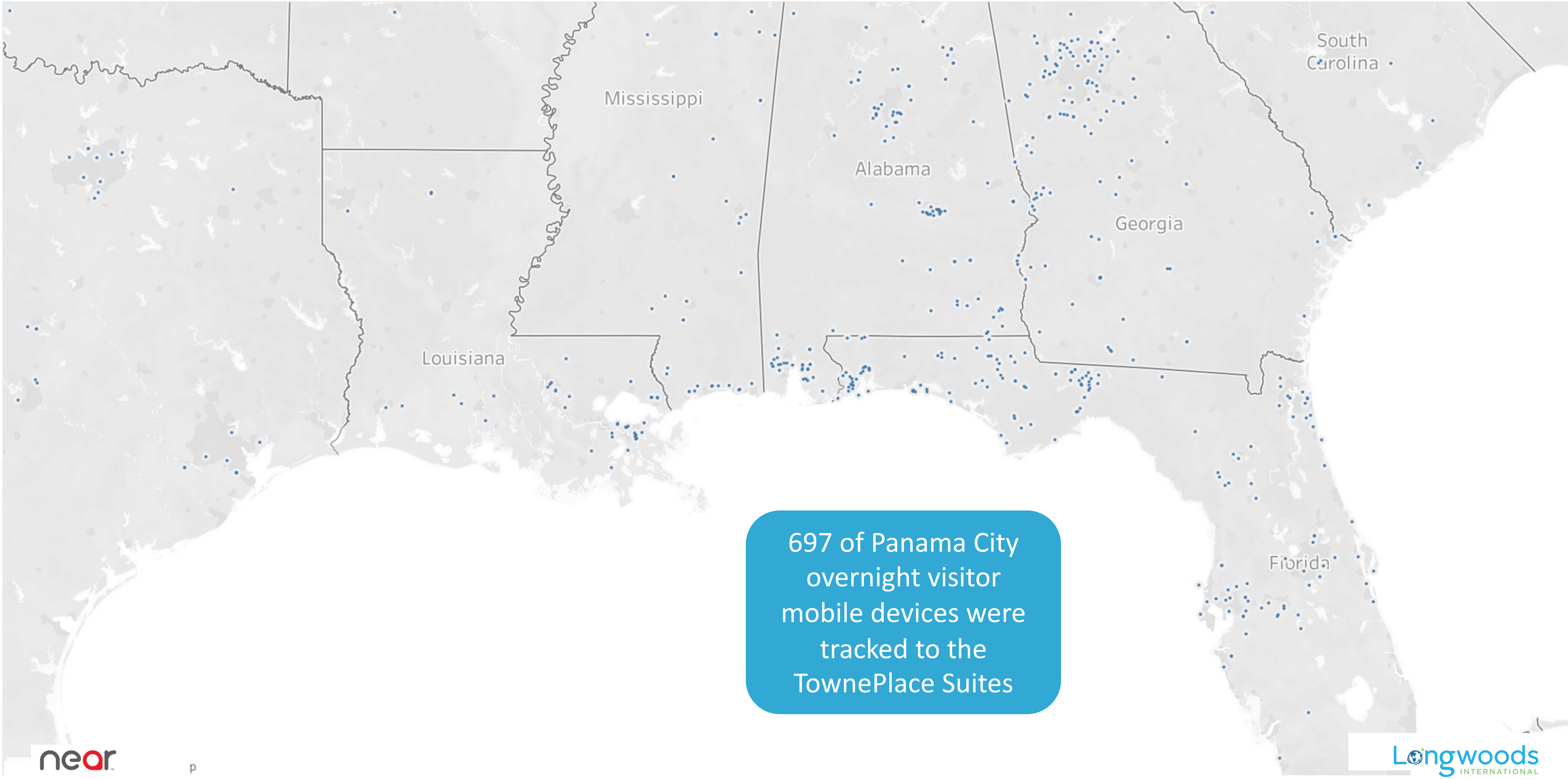
Suburban Extended Stay Panama City Origin Markets: State

Top 10 States of Origin	% of Suburban Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	23.8%	23.9%	27.6%
Alabama	20.0%	19.6%	15.3%
Georgia	19.4%	21.1%	23.1%
Tennessee	7.0%	5.2%	4.9%
Louisiana	5.2%	3.9%	2.6%
Texas	4.8%	4.5%	3.7%
Mississippi	2.8%	3.4%	2.4%
Kentucky	2.3%	2.2%	1.9%
Indiana	2.0%	1.4%	1.6%
Arkansas	1.5%	1.3%	1.0%

Suburban Extended Stay Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of Suburban Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	11.6%	12.8%	14.3%
Panama City, FL	9.5%	8.2%	11.2%
Birmingham, AL	6.7%	5.5%	4.3%
Mobile, AL-Pensacola, FL	6.7%	6.5%	5.3%
Tallahassee, FL-Thomasville, GA	4.1%	4.4%	4.6%
Dothan, AL	3.8%	4.3%	4.1%
Nashville, TN	3.6%	2.6%	2.3%
Columbus, GA	3.4%	3.7%	3.6%
Huntsville-Decatur, AL	3.1%	2.2%	1.5%
Montgomery-Selma, AL	2.7%	3.2%	2.0%

TownePlace Suites Panama City Visitors



697 of Panama City overnight visitor mobile devices were tracked to the TownePlace Suites

near

Longwoods INTERNATIONAL

TownePlace Suites Panama City Origin Markets: State

Top 10 States of Origin	% of TownePlace Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Florida	24.7%	23.9%	27.6%
Alabama	17.1%	19.6%	15.3%
Georgia	16.9%	21.1%	23.1%
Louisiana	5.7%	3.9%	2.6%
Mississippi	5.3%	3.4%	2.4%
Tennessee	5.0%	5.2%	4.9%
Texas	4.7%	4.5%	3.7%
North Carolina	1.9%	1.1%	1.6%
Missouri	1.7%	1.3%	1.3%
South Carolina	1.4%	1.1%	1.3%

TownePlace Suites Panama City Origin Markets: DMA

Top 10 DMAs of Origin	% of TownePlace Overnight Visitors	Hotels Overnight Visitors	Total Overnight Visitors
Atlanta, GA	11.5%	12.8%	14.3%
Mobile, AL-Pensacola, FL	9.0%	6.5%	5.3%
Birmingham, AL	5.5%	5.5%	4.3%
Panama City, FL	5.0%	8.2%	11.2%
Tallahassee, FL-Thomasville, GA	4.9%	4.4%	4.6%
Tampa-St. Petersburg, FL	4.2%	2.4%	2.6%
New Orleans, LA	3.9%	2.0%	1.4%
Montgomery-Selma, AL	3.4%	3.2%	2.0%
Columbus, GA	2.9%	3.7%	3.6%
Nashville, TN	2.7%	2.6%	2.3%

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HUG Presentation

Panama City Community Development Council dba Destination Panama City Agenda Item Summary

1. *PRESENTER NAME:* Jennifer M. Vigil President & CEO	**2. *MEETING DATE:*** 2/8/2022

3. *REQUESTED MOTION/ACTION:*

Discussion and provide CEO guidance on how to pursue recommended actions.

4. *AGENDA* PRESENTATION ☒ PUBLIC HEARING ☐ CONSENT ☐ REGULAR ☐	**5. *IS THIS ITEM BUDGETED (IF APPLICABLE)?:*** *YES* ☐ *NO* ☐ *IF NO, STATE ACTION REQUIRED* ☐ *N/A* BUDGET ACTION: FINANCIAL IMPACT SUMMARY STATEMENT: DETAILED ANALYSIS ATTACHED?: YES ☐ NO ☐

6. *BACKGROUND:* ***(WHY IS THE ACTION NECESSARY, WHAT ACTION WILL BE ACCOMPLISHED, (WHO, WHERE, WHEN & HOW)***

On, October 12, 2021 Destination Panama City engaged the Huddle Up Group to provide guidance on the future of sports tourism for Panama City, facilities east of the Hathaway Bridge, and how to better position Destination Panama City as an organization capable of competitively recruiting sporting events to the area.

Eric Olson, Principle at the Huddle Up Group, will be presenting the report.

SPORTS TOURISM PROJECT FINDINGS + RECOMMENDATIONS

Destination Panama City
2.8.22

DESTINATION
PANAMA CITY
FLORIDA
WHERE LIFE SETS SAIL

SPORTS TOURISM STRAT PLAN + FACILITY RECOMMENDATIONS

DESTINATION PANAMA CITY

DESTINATION
PANAMA CITY
FLORIDA
WHERE LIFE SETS SAIL

Huddle Up Group

February 8, 2022

POWERED BY THE HUDDLE UP GROUP

February 8, 2022

Jennifer Vigil
President and CEO
Destination Panama City
101 West Beach Drive
Panama City, FL 324001

Dear Ms. Vigil,

Thank you for your efforts on our recent work in the Panama City area. You, your team, and your community stakeholders have been quite helpful throughout this process. The groundwork we have set with your local leadership will serve as a strong foundation for future sports tourism, venue, and event development efforts in Panama City.

Enclosed is the report detailing our findings. This report includes a SWOT analysis, an overview and evaluation of the venue inventory in Panama City, and recommendations to enhance your destination's venue "tool kit" in the future. Both the SWOT analysis and the recommendations are built on a "Powers of Three" foundation (in most cases, no more than three focus areas for each section).

Please let me know if you have questions about the enclosed recommendations leading up to the roll out of the report and community presentation. We are looking forward to our next visit and our follow-up discussions.

Thank you again for all your support throughout this process!

Yours in Sport,

Eric Olson
Principal
Huddle Up Group, LLC

Destination Panama City
Strategic Plan, Facility Audit and Recommendations
Executive Summary

In the opinion of the Huddle Up Group (hereafter the "Consultant" or "Consultant Team"), Destination Panama City ("DPC") has an opportunity to solidify itself as a strong sports tourism destination in Florida. Throughout this process, Panama City's community leaders showed a desire to grow sports tourism in the region and for DPC to become more engaged with the area's stakeholders. Both characteristics are positive signs that the area is ready to grow sports tourism in the region.

This facility audit project was conducted with the input of three members from the Consultant Team and included a 6-step process, including, but not limited to the following:

- Four (4) in person and eleven (11) phone interviews with Panama City area leaders.
- Twenty (20) electronic survey responses from Destination Panama City stakeholders.
- Tours of 13 different sites that encapsulate more than 20 sports and event venues.
- Insights from USA Pickleball, USA BMX, USA Volleyball.
- Benchmarking against several high performing venues both regionally and nationally.
- A rating of DPC through the Sports Tourism Index™ (a proprietary benchmarking tool developed by the Huddle Up Group, summarized in Appendix E).

The initial scope of the project was for the evaluation a 19.54-acre land grant (see Appendix E) to Panama City from the SweetBay community for development of a sports facility to drive sports tourism efforts and serve community needs within Panama City. At the conclusion of the initial site visit in November, it was identified that the parcel would also encompass a new fire station and retention pond which reduced the site to 16-acres. Based on this information the Consultant Team recommends identifying an alternative site that would be larger in size. Specifically, meeting a minimum of 30-acres for development of an adequate facility that would incorporate best practice benchmarks elaborated within the recommendations.

The Consultant Team has developed the enclosed report which offers a SWOT analysis and recommendations for facility development independent of a site along with an enhanced sports tourism marketing program. This document offers depth on each recommendation along with back up research and benchmarks that support each of the suggestions made by the Consultant Team. In summary, there are three (3) primary and four (4) secondary recommendations, each of which is detailed in the full report:

Primary Recommendations – Sports Tourism Marketing

1. Technology Use
2. Dedicated Sports Staff
3. External focus

Secondary Recommendations – Facility Development Opportunities

1. Indoor Court Venue (New)
2. Indoor Pickleball Venue (New)
3. Venue Enhancement (Existing)
4. Develop a Community-Wide Sports Tourism Facility Master Plan

The opportunity at hand is to put in place an enriched sports tourism support system that engages all stakeholders throughout Panama City and the surrounding area that will drive more economic development and also improve opportunities for community user groups. Through a community-wide effort, DPC can drive increased economic activity through sport in the form of additional overnight stays, which will provide more lodging and sales tax revenues to the region year over year. The opportunity to leverage the demonstrated successes of Panama City Beach and their sports tourism efforts coupled with the multiple opportunities within Panama City (eastern portion of Bay County). the Consultant Team believes Destination Panama City is the ideal entity to lead the facility development and enhancement charge.

###

Destination Panama City
Facility Audit and Recommendations
Synopsis

The sports tourism industry has grown consistently over the past 20 years. Studies show that the grass roots portion of this market is worth more than $15 billion annually to the domestic economy. Add to this industry growth the increased popularity of soccer, lacrosse, and other emerging sports (examples: Bicycle Moto Cross or BMX, pickleball, quidditch, rugby, e-gaming and ultimate disc golf), the opportunity for the continuing expansion of economic development through sports tourism is tangible.

Throughout the research process, it became apparent to the Consultant Team that there is an opportunity for Destination Panama City to enhance its presence in the sports tourism market. The key moving forward is for community stakeholders to work together in developing tourism driving assets (sports venues) that can deliver upon the sports tourism mission of DPC on a recurring basis from one year to the next. Through the execution of a strategic and targeted facility development game plan, DPC will strengthen its position as a player in the sports tourism and events industry.

Methodology

The Consultant Team conducted an audit on the current sports tourism work of Destination Panama City and an analysis of the area's sporting venues. The audit included a multiple day market visit (November 17-19, 2021), 15 in-person or phone interviews, and twenty (20) electronic survey responses. The Consultant Team also communicated with two (2) of the top event rights holders in the country to get their feedback on new facility needs in Northwest Florida. Stakeholders that were engaged included DPC staff, community leaders, venue managers, athletic administrators, event owners, hospitality industry executives, local club leaders and additional targets that were identified by Destination Panama City. The Consultant Team also visited 13 existing or planned sports and entertainment sites, which included over 20 venues. These facilities are listed below, and in Appendix D along with a rating for each venue and potential enhancements/improvements that could be made to help attract more tourism driving events.

- Bay Dunes Park
- Bay High School Theater Building
- Callaway Recreational Complex
- Frank Brown Park
- Frank Nelson Park
- Gretchen Nelson Scott Performing Arts at Mosely High School
- H.G. Harder's Park
- Lynn Haven Sports Park
- Oakland Terrace Park
- Panama City Beach Sports Complex
- Southport Sports Park
- SweetBay "Proposed" Park
- Tommy Oliver Stadium

The audit was led by Huddle Up Group Principal Eric Olson (St. Louis, MO) and with support from Director Dean Polk (Hershey, PA). The audit focused on five (5) areas:

1. Evaluation of 19-acre site from the SweetBay land grant.
2. Evaluating the current facility inventory and quality.
3. Benchmarking of the current facilities using the Sports Tourism Index™ as a scoring tool.

4. Providing a gap analysis and recommendations for new facility development that could drive ancillary tourism to the market.

5. Detailing an economic impact analysis of the top new facility development opportunity. Discussions were held around national best practices in these theme areas and focus was given to applications for DPC. The intent of this process was to create community support for DPC's increased sports tourism marketing and venue enrichment efforts by giving local stakeholders a voice, and to further promote collaboration throughout Panama City.

The Consultant Team took the results from the phone interviews as well as the data from the Sports Tourism Index™ and the site visit to the Panama City area, then overlaid national best practices from several event rights holders to develop and deliver the enclosed recommendations. These recommendations are intended to spark a dialog within the community's leadership hierarchy in order to build a framework for next steps on an expanded sports tourism marketing effort.

The recommendations presented here are based upon what the Consultant Team believes are five (5) universal truths about the Panama City's tourism and sports market position:

1. There is a desire to enhance sports opportunities in Panama City.

2. Many of the existing facilities are aging or were significantly damaged by Hurricane Michael and need investment in the immediate future in order to drive sports tourism

3. The organizational structure for supporting sports tourism is not sustainable and warrants study to identify resources to drive sports tourism development.

4. The local/regional competition is fierce, and there is a focus on facility investment throughout the area.

5. Panama City is well located geographically to be a strong sports tourism player in Northwest Florida.

Destination Panama City
Facility Audit and Recommendations
SWOT Analysis

It is the opinion of the Consultant Team that there is an opportunity to grow sports tourism in Panama City. Through our extensive analysis and our knowledge of the national marketplace, we believe there is room for Destination Panama City to deliver additional overnight stays to the destination through sports and events. An expanded sports tourism effort will lead to increased economic development and will positively impact the community over time.

In a market the size of the Panama City, with its numerous positive attributes, it is critical that grass roots sports tourism as well as special events continue to serve as economic drivers for the local economy. Keeping that in the forefront of DPC's objectives, and focusing on facility development, below is a SWOT analysis of the status of Destination Panama City.

Strengths

1. Destination Location – Panama City offers event rights holders and visiting teams a hospitable and inviting family friendly community that is well situated to host state, regional, and select national level tournaments. The destination is affordable and geographically well positioned to access via air and ground. The location is ideal for regional tournaments as it sits in the Northwest portion of the state with regional jet service and is also within a short drive of several other metropolitan areas including, Pensacola, Tallahassee, and Jacksonville.

2. Staff & Community Leadership – Panama City has a solid mix of community leadership, and the Destination Panama City staff is very well respected, locally. Numerous survey respondents shared that they believed DPC staff was collaborative, responsive, and did an overall excellent job supporting events with limited resources. DPC's stakeholders unilaterally support an increased emphasis on the recruitment of sports events that diversify and drive economic impact throughout the calendar year. There is an agreement among most community stakeholders as to the sports facility needs of Panama City and the role that Destination Panama City should play in the development and programming of those venues.

3. Partner Presence – Multiple universities, colleges and community entities call the Panama City area home. The collection of available partners such as Bay County Parks & Rec, Gulf Coast State College, Florida State University-Panama City, Bay District Schools in addition to rights holders such as Southern Elite Sports which would be excellent entities to partner with for hosting and/or event creation.

4. Culture – Panama City has a thriving historic downtown with team-friendly restaurants and several attractions, such as the Panama City Center for the Arts and the Bay County History Museum. Despite the lack of current sports tourism "anchor" facilities, these factors make Panama City a desirable host site for tournaments and special events.

Weaknesses

1. Facilities Challenges – In general, Panama City (eastern Bay County) lacks the adequate indoor facilities to provide residents and visitors the necessary space to compete both with traditional "indoor" sports and "outdoor" sports that can continue year-round when moved indoors. This assessment does consider the recently announced indoor sports center located at the PCB Sports Complex. Additionally, the destination has a no inventory of "tournament friendly" and "anchor" facilities that can be used to attract top tier participant focused championships and their related tourism dollars. An anchor facility is defined as a venue that has enough fields/courts/sheets on its own to host major regional or national events all in one location. In addition to the pure number of fields/courts/sheets, the top anchor facilities in the country also provide key amenities that event rights holders need to host high quality events. Below is benchmarking information from a Huddle Up Group survey of over 300 event rights holders, outlining their ideal facility requirements.

Facility Type	Anchor	Tournament Friendly
Flat Fields	Minimum 16 fields	8-15 fields
Pool	50m/8-10 lanes with diving well	25m with diving well
Diamonds	Minimum 12 fields	8-11 fields
Hardwood Courts	Minimum 8 Basketball/ 16 Volleyball	4 Basketball/8 Volleyball
Ice	3+ Sheets Hockey/ 6+ Sheets Curling	2 Sheets Hockey/ 4 Sheets Curling
Tennis	Minimum 12 courts	Minimum 6 courts
Pickleball	40-60 Courts (National)	8-16 Courts (Local) 24-32 Courts (Regional)
Indoor Track	200 meter/6 lanes/banked	200 meter/6 lanes

Below is a list of some of the top performing sports tourism driving facilities in the country. Some of whom do or will directly compete with Destination Panama City. These destinations include, but are not limited to the following, each with best-in-class sports complexes that meet the tournament friendly or anchor facility benchmarks:

- Aurora Sports Park (Aurora, CO)
- Champions Center (Appleton, WI)
- Crossplex (Birmingham, AL)
- Dick's Sporting Goods Park (Commerce City, CO)

- ESPN Wide World of Sports Complex (Lake Buena Vista, FL)
- Elizabethtown Sports Complex (Elizabethtown, KY)
- Grand Park (Westfield, IN)
- Great Park (Irvine, CA)
- Hoover Metplex (Hoover, AL)
- LakePoint Sports Complex (Cartersville, Ga)
- Myrtle Beach Sports Center (Myrtle Beach, SC)
- National Sports Center (Blaine, MN)
- Rocky Mount Events Center (Rocky Mount, NC)
- Virginia Beach Sports Center (Virginia Beach, VA)

2. Dedicated Staff – Destination Panama City currently lacks the dedicated staff to effectively sell and service Panama City as a sports tourism destination. Numerous survey respondents mentioned that they thought the DPC staff did a great job with the resources they currently had but believed the addition of staff members focused solely on selling, marketing, and servicing sports and events in the Panama City area would be a tremendous asset to the community. Nearly all the high performing sports tourism organizations spend considerable time and resources supporting their event partners before, during, and after their events take place. The Consultant Team calls the active support to the rights holder by the host destination "wearing backpacks". Sports commissions, CVBs, or DMOs that can put on the "backpacks" and help the event organizer outside the field of play, free up that event owner to focus entirely on the proper execution of their championship. This added level of support leads to a higher renewal rate between the event owner and those "backpack" destinations, which sustains their sports tourism business year over year, and allows the destination to be more selective when trying to fill out their annual event calendar.

3. Identity and Strategic Goals – Respondents to phone interviews and online surveys struggled to identify DPC's identity, mission, and goals. Notably, most survey respondents were unable to convey DPC's mission without The Consultant providing some sort of lead-in. Examination of DPC's alignment with the City of Panama City and DPC Board should be taken into consideration to ensure buy-in from all key constituents.

Opportunities

1. Existing Facilities – There are a decent number of facilities throughout Panama City, however, many of these facilities are outdated, in need of major renovations, and will have – or face the challenge of – inability to drive sports tourism and losing events to newer venues in nearby towns that have more amenities.

2. Community Engagement – Through an enhanced sports tourism organization, DPC will have a great opportunity to significantly grow its connection to the community. Specifically, DPC can use a sports tourism initiative within Panama City to galvanize area leaders in the following ways:

    - Education – Sports tourism has the potential to make a significant positive impact on within the Panama City marketplace. The Consultant Team believes there is a need for both internal and external education of potential value and impact of sports tourism to the area. In the minds of the Consultants, the hospitality community, elected officials, and various businesses could all benefit from a summary on the overall positive impact sports related business that could be brought to the area benefiting the community in the future.

3. Partnerships – No matter which facility development pathway(s) are chosen, there are significant partnership opportunities that can be tied to each option. This includes the continued partnership with Panama City Beach and the Sports Complex as well as the numerous entities that currently exist in the Panama City area that could be long-term partners (examples: Bay Blaze Track Club, Bay County Disc Golf Club, Panhandle Runners Club, Southern Elite Sports, Snap Soccer, Bay County Parks & Rec, Bay District Schools, Gulf Coast State). There are also potential partnerships to be had with entities that don't currently have a significant presence in Panama City that would likely want to have one (examples: USTA, USA Pickleball, NCAA, NAIA)

4. Local Programming – If the vision of a new tourism driving facility can be realized, it should not be lost that Panama City's youth will also have better places to participate in sports throughout the year. In addition, a new facility would save the local clubs and their participating families thousands of dollars a year that they currently spend on travel (and rent) to facilities in neighboring communities. Hosting more practices and tournaments in the Panama City area will keep local dollars in the community rather than exporting them to other jurisdictions.

Threats

1. Local/Regional Competition – There are multiple competitors in Panama City's geographic region that are well established in the national sports tourism space (see Appendix B). The level of established competition from nearby communities is only the beginning. There are numerous communities in Northwest Florida that are currently expanding their sports tourism efforts. This growing competition makes it more difficult each day for Panama City to remain relevant locally, regionally, and nationally. While Panama City may not want to be "like" some of these communities, their presence in the sports tourism space will require DPC to pick its proverbial spots and be smart about what its focus areas become with the limited resources it has available to work with today.

2. Facility Investment – In most cases, the Panama City area is behind its regional competitors in regard to facilities. Many of Panama City's existing facilities are aging, damaged and in need of upgrades. If this issue goes unchecked, it will not be long before driving sports events to Panama City become somewhat of a major challenge. Additionally, if no sizable investment is made into sports facility infrastructure soon, the local clubs will be hard pressed to grow the tournaments and programs they have in place today. It is important that DPC make the area's elected officials aware of the value of sports tourism and the loss (in economic impact and tourism dollars) that could occur if investments aren't made in facility infrastructure, especially tournament friendly and/or anchor facilities oriented towards youth sports.

3. Future Funding –There are several national best practices for funding sustainable facility development programs, in the case of the Panama City there are traditional mechanisms are already in place such as the Tourist Development Tax, which is currently 5% and funds DPC's budget. This is an area for deeper discussion with the community's leaders that have an influence on potential funding sources to enrich sports tourism in the destination (example: growth of the Tourist Development Tax).

4. Lack of a Regional Master Plan – There is no facility master plan for Panama City. While the various parks departments, cities, counties, schools, and club programs all likely have a venue development plan in place, there is no unified plan that aligns the region as a whole. The lack of a regional plan could lead to the development of redundant facilities if the various entities are not collaborating with one another. This is a significant area of opportunity and potentially help Panama City develop a unified plan that would better sports tourism in the future. This process would also likely lead to better regional alignment of the various partners that may not be engaged today.

Destination Panama City
Facility Audit and Recommendations
Primary Recommendations

The enclosed recommendations include three (3) primary opportunities for an enhanced sports tourism marketing program and four (4) secondary concepts for new facility development. While the scope of work for this project had a focus on facility development opportunities, it is likely that the enhancement of the sports tourism marketing program could deliver returns much earlier than the development and construction of an entirely new venue. The recommendations are listed in the following pages along with more detail on each concept.

Primary Recommendations – Sports Tourism Marketing

1. Enhance the Staff – To stand out in the highly competitive sports tourism industry, DPC must add dedicated headcount to lead the sports tourism marketing effort. The primary responsibilities of this position would include business development as well as servicing the events when they are hosting in Panama City. If a second dedicated sports position can be added in the future, it is most common that one staffer serves as the main sales arm and the other provide support services on game day. Data from the Sports Tourism Index™ shows that 74% of all the CVBs on the platform have a dedicated business development person and 52% have dedicated staff to service events. While there is an opportunity for DPC to build its staffing levels, currently there is not a budget allocation dedicated solely to a sports tourism staff, advise for funding support from Panama City should strongly be considered.

2. Technology Use – Outside of the traditional trade show marketing that most CVBs and sports commissions use to network and drive business to their communities, the use of an online match-making tool would serve as a cost-efficient resource to identify events that could be held in Panama City. Use of technologies such as the Sports Tourism Index™ and Scout platform will require a dedicated person to enter the data and to optimize the event search features, so the implementation of item #1 above goes hand in hand with the use of new technologies.

3. External Focus – Executing the recommendations in this report will take an intentional effort from the DPC team to be externally focused with community stakeholders. This means an ongoing and consistent outreach program to the area's venue owners/managers, high schools, colleges, elected officials, and hospitality community leaders. By focusing more time on the larger regional conversation relating to sports tourism, DPC can connect the dots between various community partners and uncover more collaboration opportunities in the future. The Consultant Team recommends continued engagement with the Bay County Recreation Advisory Board (best in class: Eau Claire, WI) and the "Four Touch Rule" for all area stakeholders (tracking of four individual meetings or conversations per year with each stakeholder). To compete with destinations playing in the top realm of sports tourism and events, it is likely that post-pandemic, DPC will need to add human capital (staff) that are dedicated to this area. The Louisville Sports Commission and Richmond Region Tourism are great examples of how to best serve as the connective tissue for collaboration opportunities throughout the community.

Destination Panama City
Facility Audit and Recommendations
Secondary Recommendations

Below are four (4) secondary recommendations that focus on opportunities for sports tourism facility development. The recommendations outlined below are listed in order based on what the sports tourism impact is likely to be for Panama City if each of these facilities come to fruition.

Secondary Recommendations – Facility Development Opportunities

1. New Indoor Court Venue (Hardwood) – As in many communities similar to Panama City, the need for accessible tourism-driving indoor spaces would likely add value to the destination. The existing indoor court sports-focused facilities lack the number of courts that event owners demand, and many have local user groups that control the event calendar. A dedicated, tourism driving, indoor court sport focused facility could drive additional tourism to the destination and also provide new opportunities for local programs to expand.

   Using the Sports Tourism Index™ as a benchmarking tool, following is chart summarizing the key characteristics possessed by the top indoor sports facilities in the country. Note that in the "Difference" column, the darker the color of green, the larger the gap between the top 10 facilities and the average venues.

	AVERAGES		
	Top 10	**Overall**	**Difference**
# Bball Courts	12.3	3.4	8.9
# Vball Courts	21.1	4.7	16.4
Court Surface (Hardwood)	80%	75%	5%
Scoreboard	100%	82%	18%
Scorer's Table	100%	90%	10%
Team Benches	60%	36%	24%
PA System	60%	60%	0%
Locker Rooms	70%	69%	1%
Permanent concession stand(s)	100%	77%	23%
Permanent restrooms	100%	100%	0%
Permanent Wi-Fi	100%	89%	11%
Parking	100%	98%	2%
ADA Compliant	100%	99%	1%
Auxiliary meeting rooms	5.1	2.9	2.2
Ability to book (Definitely yes)	90%	51%	39%
Score	3.95	2.80	1.15

The data presented here would indicate that it would benefit Panama City by developing a tourism focused facility that could serve the community and also host state, regional, and some select national level tournaments. Given the national experience of the Consultant Team and its knowledge of the current landscape in the Panama City area, the Consultant Team believes adding a tournament ready indoor court facility to the region's current venue mix would return the highest ROI to the community. Such a new venue would provide Panama City with a tournament ready facility that it doesn't currently have in its inventory. Beyond the pure court count, in order to become a valued asset for tournament organizers, the facility would need to include the amenities listed below. Add to this DPC's ability to secure national events and the multitude of local partnerships that are available, the key elements are in place to support the buildout of a new facility. A new indoor court focused facility in Panama City should have the following elements:

- 4-8 Courts for basketball (8 preferred) that could then convert to 8-16 volleyball courts.
- A flexible championship court that could accommodate at least 1,000 spectators and the ability to expand total seating for larger championship events.
- Scoreboards, shot clocks, benches, PA systems, locker rooms, and a press table dedicated to each court.
- Ancillary meeting space for tournament operators and officials.
- Permanent restrooms, concession stands, and Wi-Fi throughout the facility.
- Parking that meets industry standards (at least 3.5 permanent spaces per 1,000 square feet).
- A common area to accommodate athletes and spectators.
- ADA compliant.
- Ability for DPC to book the facility for tourism driving events ("Favored Nation Status").

As part of the scope of work for this project, the Consultant Team was tasked with creating a top-line impact analysis of what the number one recommended venue development opportunity could generate for the community. Should DPC, Panama City and its partners find a pathway to develop a new multi-sport indoor court focused venue, the facility would be able to host sizable events throughout the year. This would be especially true during shoulder and off-peak tourism seasons. Using a conservative 25% capture rate for proven events that could fill the facility's calendar, the Consultant Team believes the following new economic activity (beyond what DPC is driving today) could reasonably be realized over a calendar year*:

- 10.5 new state, regional, and national tournaments.
- Nearly 23,000 total attendees relating to tournaments/competitions.
- Over $6 million in direct visitor spending.
- More than 11,500 hotel room nights.
- Hotel Occupancy Taxes of nearly $47,000.
- Sales Tax collections of nearly $70,000.
- Total sports tourism related taxes over $116,000. *

Example of event opportunities specifically in off-peak seasons and associated impact (Nearly $3 million in direct visitor spending*:

Date	Prospective Event	Regional/ National	# Teams	Travel Party Size	# Spectators	# Admin	Total Attendees	Length of Stay (Days)	Total Spending
Dec wk 1	Community Programming								
Dec wk 2	USA Volleyball - Southern Region	Regional	32	15	480	40	1,000	1	$ 87,000
Dec wk 3	Hoop Hall Southeast Basketball Tournament (Boys and Gi	Regional	32	25	800	40	1,640	4	$ 570,720
Dec wk 4	High School Holiday Basketball Tournament	Regional	64	20	1,280	40	2,600	4	$ 904,800
Dec wk 5	Community Programming								
Jan wk 1	Community Programming								
Janwk 2	USA Volleyball - Southern Region	Regional	100	15	1,500	40	3,040	1	$ 264,480
Jan wk 3	FHSAA Team Duals Wrestling State Championships	Regional	56	25	1,400	60	2,860	1	$ 248,420
Jan wk 4	USA Volleyball - Southern Region	Regional	100	15	1,500	40	3,040	1	$ 264,480
Feb wk 1	USA Volleyball - Southern Region	Regional	100	15	1,500	40	3,040	1	$ 264,480
Feb wk 2	FHSAA State Dance Championship	Regional	32	12	384	20	788	1	$ 68,556
Feb wk 3	USA Volleyball - Southern Region	Regional	100	15	1,500	40	3,040	1	$ 264,480
Feb wk 4	Community Programming								

*Notes: The detailed impact analysis can be found under different cover.

Best in Class Facility Examples:

- Myrtle Beach (SC) Sports Center
    - Built – 2015
    - Cost – $13,00,000 (some infrastructure costs were covered by the city)
    - Size – 100,000 square feet
    - Configuration – eight (8) full basketball courts with limited seating

- Rocky Mount (NC) Events Center
    - Built – 2018
    - Cost – $48,000,000
    - Size – 165,000 square feet
    - Configuration – eight (8) basketball courts plus a championship court, also designed to host musical acts, both modular and telescopic seating options

Additional Examples:

American Sports Center (Anaheim, CA), LakePoint Champions Center (Atlanta, GA), Virginia Beach Sports Center (Virginia Beach, VA), Champions Center (Grand Chute, WI), Community First Champions Center (Grand Chute, WI), Omaha Sports Academy (Omaha, NE), Grand Park (Westfield, IN), Hoover Rec Plex (Hoover, AL), Rock Hill Sports Complex (Rock Hill, NC).

2. New Indoor Pickleball Venue – There is greater community and tournament demand for indoor court space in the Panama City area than the community's current facilities can serve. This is especially true for pickleball and tennis. The development of a new, indoor pickleball facility would likely drive more tourism to the community as well as offer more access to the local user groups to grow their programs. A new indoor pickleball facility in Panama City should have the following elements:

- Minimum 24 courts.
- 1 "stadium" court with seating for up to 250.
- Scoreboards, benches, and PA system dedicated to each court.
- Locker rooms and ancillary meeting space for tournament operators and officials.
- Permanent restrooms, concession stands, and Wi-Fi throughout the facility.
- Parking that meets industry standards (at least 3.5 permanent spaces per 1,000 square feet).
- A common area to accommodate athletes and spectators.
- ADA compliant.
- Ability for DPC to book the facility for tourism driving events ("Favored Nation Status").

Best in Class: House of Pickleball (Leeland, NC), Iowa West Field House (Council Bluffs, IA), Chicken n Pickle (various locations), Pickleball Island (Grand Island, NY), Pickleball Zone (Bend, OR), SentryWorld Pickleball (Stevens Point, WI).

3. Venue Enhancement – The existing facilities, such as HG Harder's Park and Tommy Oliver Stadium have a history of servicing the community for local programming. However, to achieve success, and given the highly competitive marketplace to host the top tier national events, these existing venues need to enhance its offerings to be competitive into the future. For example; beyond a pure field count (five softball, two baseball and nine flat fields), the existing facilities would need significant upgrades of basic amenities such as seating capacities, covered benches, lights, permanent Wi-Fi, additional artificial turf options, etc. Further, the addition of an entirely new facility (or the expansion in field count at HG Harder's Park, utilize existing flat fields for expansion) would likely drive additional overnight stays to the destination.

   Best in Class: North Softball Complex (Fargo, ND), Louisville Slugger Sports Complex (Peoria, IL), Pacific Avenue Athletic Complex (Yuma, AZ), ESPN Wide World of Sports (Lake Buena Vista, FL), EastSide Centre (East Peoria, IL), Rantoul Family Sports Complex (Rantoul, IL) USSSA Space Coast Complex (Melbourne, FL)

4. Regional Sports Tourism Facility Master Plan – There is not a unified game plan for future facility development and/or enhancement for the entire destination. Pulling together the wants and needs of all area stakeholders would be a valuable exercise to eliminate any redundancies in the future. Destination Panama City is the perfect entity to lead such a project and to generate community-wide momentum relating to placemaking through sports.

Typical Funding Models

In order to enrich the destination as a desirable sports tourism market, DPC and its partners need to identify a sustainable funding source to enhance, develop, and maintain tourism driving assets. Numerous markets across the country have implemented a dedicated tourism-based revenue source (a tax) to enhance their sports commissions and sports facilities. These revenue streams most commonly come in the form of a hotel occupancy tax or a food and beverage tax that are dedicated to the singular purpose of increasing overnight stays through hosting sporting events. A sample list of destinations that have gone down these funding pathways can be found in Appendix C. Should such a tax, or another funding source be identified, the Consultant Team has outlined below how such a funding model could work for DPC and its sports tourism program:

- Sports Development Fund – Identifying a dedicated funding source to enrich Panama City's sports venue inventory is critical for DPC and its partners to grow the community's sports tourism impact into the future. The national best practice for the activation of these newly identified funds would be to use them as a catalyst for a "challenge grant" style program. That is, there would be a formal grant request process for DPC's partners to apply for funds in a dollar-for-dollar match for capital projects that would drive overnight stays to the Panama City area. For every dollar the partner invests, they would be eligible for a dollar from DPC Sports Development Fund (or similar working name). Employing this type of a matching program ensures that all parties have a vested interest in the positive outcome of each project, and that DPC's investments are well protected. In addition, effective use of these funds to drive more overnight stays would subsequently increase the impact of tax collections by these additional visitors. Finally, should this fund be put in place, DPC should tie all grants to the concept of "Favored Nation Status" noted earlier in this report.

- A major point of note, numerous cities are increasing their bed tax rate and/or using a food and beverage taxes to put towards the funding of construction and/or operation of new and enhanced sports facilities. In nearly all these cases, the taxes generated to enhance/build these facilities are to drive incremental overnight stays for the destination. Applicable funding mechanisms the Consultant Team has seen implemented nationally that could be opportunities for Panama City include (in order):

    - Incremental hotel/bed tax collections via growth of the DPC hotel room inventory

    - Local Merchant Tax- 1% applied to qualified short-term lodging

- Beyond these traditional funding mechanisms, Panama City, and some of the area's corporate leaders (St. Joe) have a vested interest in the sports market and how it can positively impact the area's youth. A discussion with the area's leaders should be had around what resources could be brought to the table for new sports facility and local program development.

Destination Panama City
Facility Audit and Recommendations
Conclusion

The most recent study by the Sports Tourism and Events Association (SportsETA, formerly the National Association of Sports Commissions) states that the participant driven portion of the domestic sports tourism industry is responsible for more than $15 billion annually. Sports tourism is big business, and the competition has never been fiercer with more communities targeting the sports market than ever before. For Panama City to become relevant in this niche market, DPC and its stakeholders must continue to build bridges with key players locally and pave the way for facility enhancement over the long term. By forging this path, the community's venue tool kit will be greatly improved, and Panama City will be better positioned regionally as a strong player in the sports tourism industry.

The addition of a new venue (or two) and an improved venue mix will allow DPC and its partners to achieve tourism growth in Panama City. The enhancement of the area's venue 'tool kit" will empower local event promoters/operators to build upon the area's historical success of creating home-grown participant driven events, develop new event and venue products, and host more bid-in regional/national championships. To achieve these lofty aspirations, DPC has some big work ahead. In order raise the bar in Panama City and to continue to positively impact the community, DPC's leadership should focus its efforts on three (3) overarching objectives:

1. Create a culture of sports and events development. Develop physical products (new venues). Develop new events. Develop human capital (DPC staff). Develop relationships (local event operators and regional/national event owners). And, finally, develop a vehicle to push the tourism agenda through sports.

2. Partner with local promoters to build created events that will call the Panama City area home long into the future and that will not be subject to an RFP process with DPC's competitors. There is a major trend in the industry around the created events concept, inclusive of a focus on the regional drive market. These are things that DPC should work with its local event owners and venue managers to evolve in the future.

3. Make the improvement of the destination's venue "tool kit" a priority by adding new venue assets and enhancing the existing assets. While this study was focused largely on developing new facilities, investing in the improvement of some of the existing venues could drive additional overnight stays to the destination in the near term. The top multi-sport facilities in the country have spurred private investment in and around them, which is something that needs to be top of mind for the leadership in Panama City throughout this venue development process.

As in any new project, there are numerous variables that need to be considered in evaluating the ROI and risk in developing a new venue or enhancing an existing one. It is the experience of the Consultant Team that destinations who consider the overall impact on their community and citizens, will have more success than those that measure success purely by room nights or bed tax collections. That is, the cities that consider the entirety of the community impact (total economic and community activity that is generated by a sports and special events program) generally display a higher level of collaboration than those that simply measure heads in beds and sales tax totals.

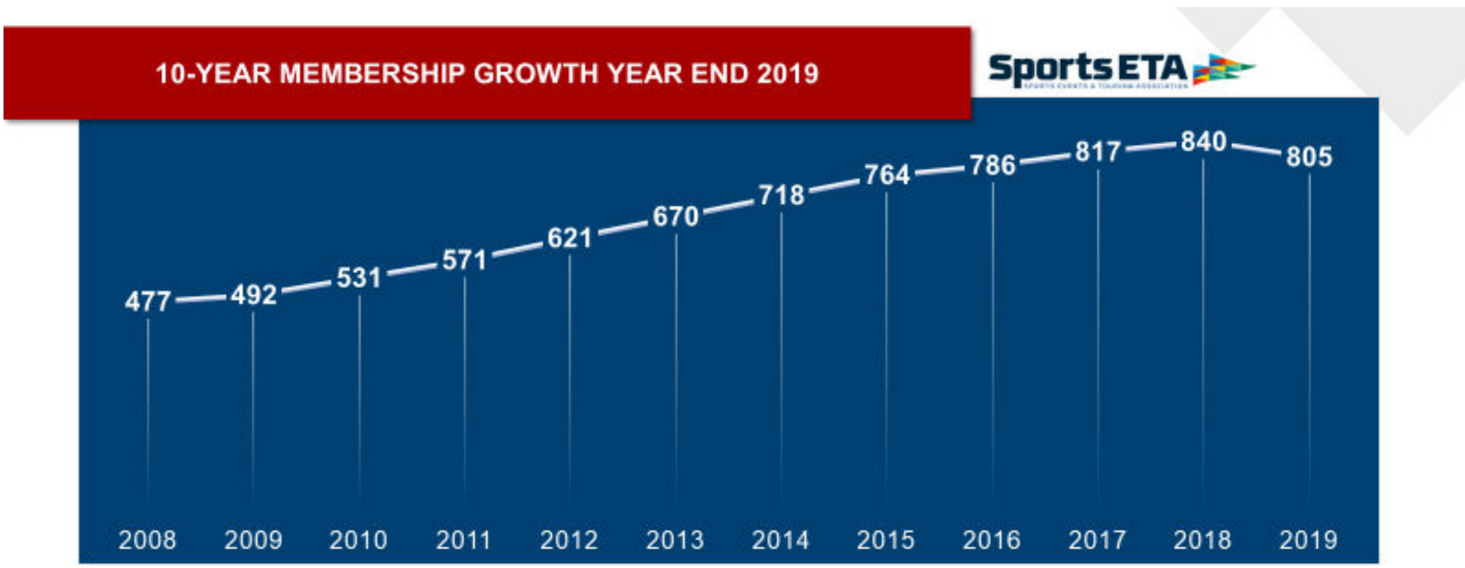
In the eyes of the Consultant Team, the puzzle pieces exist in Panama City for Destination Panama City to help expand economic development for the region through sports tourism. The only question would be to what extent this development effort can be supported financially to best benefit of Panama City, DPC, and its stakeholders. The Consultant Team believes it is within the power of the team at Destination Panama City to capture more opportunities in the sports tourism and events market, while also enriching the lives of its citizens. This community-wide effort will help DPC connect the tourism and business communities in an ongoing and proactive manner into the future.

###

Appendix A – SportsETA Membership

Prior to the COVID-19 pandemic, sports tourism has grown exponentially over the past two decades. The nature of the industry is that it is relatively “immune” to market factors such as troubled economies, war, high unemployment, 9/11, or similar factors. Studies conducted by SportsETA prior to the pandemic show that the grass roots sports tourism industry is worth over $15 billion and that there are more events today, with more participants competing in those events, than ever before.

Projections indicate that the grass roots sports tourism industry (exclusive of mega events like the Superbowl, Final Fours, etc.) is growing at a pace of 12-14% per year, with more growth anticipated in the coming decade. Below is a chart outlining the growth of membership organizations within SportsETA, which is a direct correlation to the growth of the sports tourism industry as a whole.

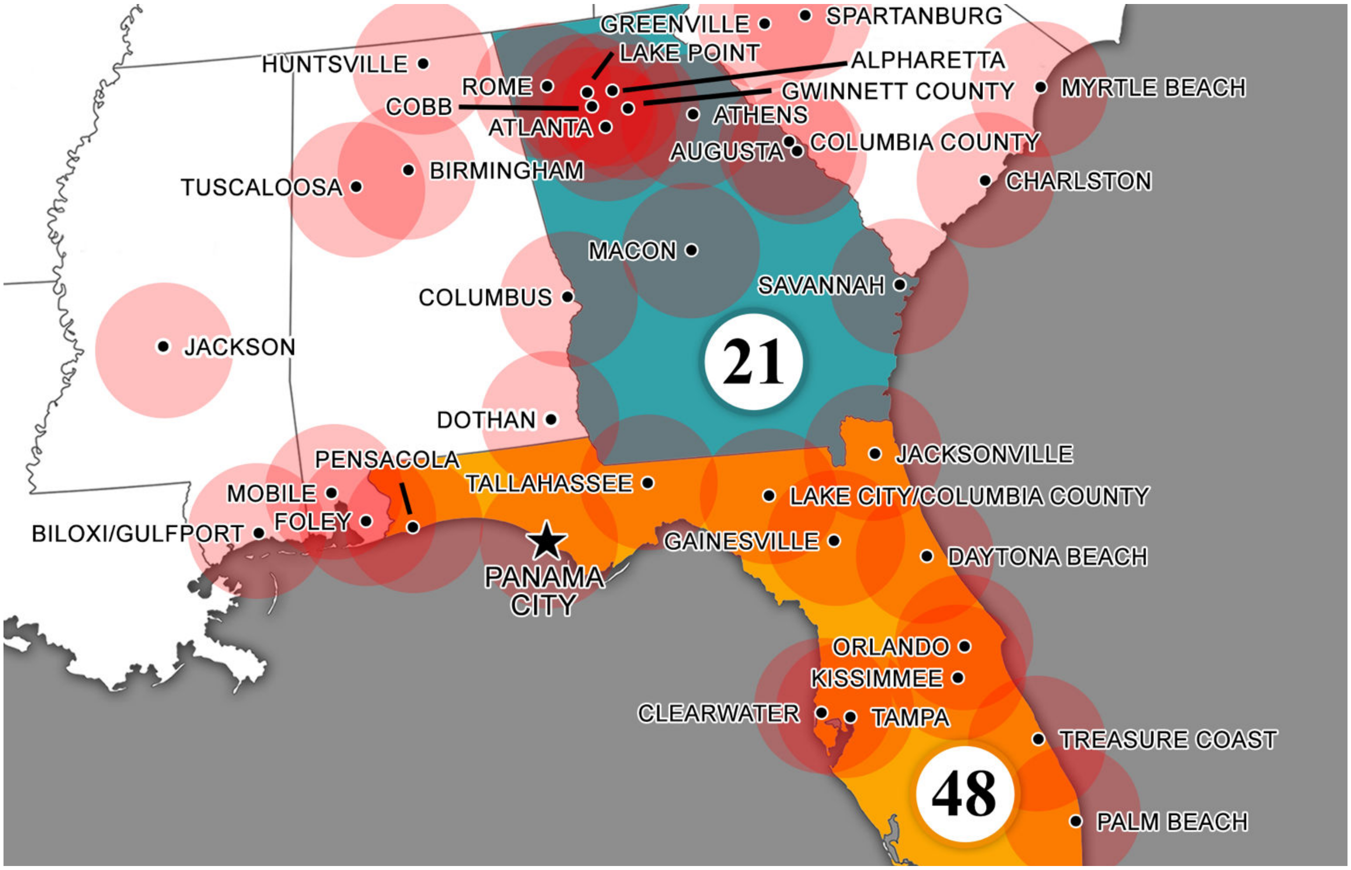


Appendix B – Destination Panama City Competition Map

The sports tourism and events industry is as competitive today as it has ever been. Numerous destinations market themselves in this niche industry in the form of a sports commission, DMO, convention & visitors bureau, city, or through an alternative organization.

Below is a visual representation of the various entities in DPC's geographic region that are active in the sports tourism and events space. The red circles surrounding each city represent drive markets for local and regional events. The Florida Sports Foundation and other cities within Florida are particularly strong, with nearly 50 destinations actively working to lure sporting events to their community (noted in orange below).

Tournaments often attract teams from as far away as a full day's drive. This graphic shows the significant level of competition in this industry and the high-level geographic overlap amongst these communities.



Appendix C – Trends in Sports Facility Funding

The most common funding source for new facilities is a general fund allocation from the city/county where the facility is located as well as a land contribution for the venue to be constructed (again donated by the city or county). Although the level of success is yet to be determined, several communities around the country have already, or are in the process of, raising their bed tax collection rate to fund sports-related facility development, including:

- Rockford (IL) having already finished a significant expansion of its outdoor sports venues, used bed tax dollars to bond $10 million towards a new indoor facility. The Downtown Sports Complex carried a price tag of $24 million and opened in late 2016.

- Evansville (IN) opened a $15 million multi-use outdoor sports complex that is entirely funded by bed tax dollars. The future management of this facility will also be funded by bed tax dollars, and it is run by the DMO itself.

- Spokane (WA) bonded $25 million against future bed tax collections to construct a new athletic field house (The Podium) which opened in December 2021.

- Shreveport (LA) passed a bed tax increase for the expansion of their Convention & Visitor Bureau's national marketing program. This new tax also supports the Independence Bowl (venue enhancements and improved matchups) and the Shreveport Regional Airport (incentives for new airline routes). This combined effort between three of Shreveport's leading agencies shows the economic development impact that sports tourism can have on a mid- or small-size market.

- Fox Cities (Appleton, WI) raised their bed tax rate from 6% to 10% to build a convention center, a new large (hardwood and ice) indoor sports complex, and to renovate three existing sports facilities used to attract regional and national tournaments. This facility opened in October of 2019.

- Placer Valley (CA) allocated funds from an increased bed tax to develop and open a new indoor hardwood complex in 2018.

- Pasco (FL), in partnership with the Florida Sports Foundation, developed a new sports complex on 120 acres of county-owned property. Pasco County is investing $11 million to the project, including $8.5 million in tourist tax funds and $2.5 million in unrestricted bond proceeds.

- In January 2016, Warren County (OH) raised the lodging tax one (1) percent to finance a $10 million, 20 field sports complex. The rate hike increased the county hotel occupancy tax from 3% to 4%. The tax will be used over 20 years to pay off debt the Warren County Convention & Visitors Bureau will take on to pay for the complex.

Appendix C – Trends in Sports Facility Funding (Cont.)

In addition to the hotel tax examples noted on the previous page, several communities have implemented a food and beverage tax for the purpose of developing or enhancing sports facilities.

- Elizabethtown (KY) passed a 2% food and beverage tax in 2012 to fund the development and management of the Elizabethtown Sports Park. In the first five years of operations, the "mega complex" generated nearly $100 million in direct visitor spending to the community (according to studies commissioned with SportsImpacts, one of the top economic impact agencies in the country). Etown as it is known, is currently looking at facility expansion opportunities to capture even more sports tourism activity.

- For the past 30 years, Fort Wayne (IN) has implemented a 1% food and beverage tax that is used for capital projects. This program has funded several new buildings at the site of the Allen County War Memorial Coliseum arena, including a 100,000-square foot expo center and 5,000-seat baseball stadium. These funds have also been used to renovate the arena's ice floor, to add 2,500 seats and meeting rooms to the arena. The fund generates $7.5 million per year and is currently being considered to help finance a new arena downtown.

- Ashland (OR) employs a 5% food and beverage tax which garners nearly $4.5 million a year. Twenty percent of these funds are allocated to the acquisition and preservation of open spaces for parks and recreation, with 80% of the funds used to retire debt for a recently completed community-wide waterway enhancement.

- Historically, King County (WA) has used intermittent funding from food and beverage taxes to build stadiums such as the King Dome. While this program is not active today, it has been a tool the Greater Seattle area has used in the past for venue development to entice professional sports teams to the area. Similarly, the State of Florida has a professional league stadium venue development program that is also funded by temporary food and beverage taxes, when needed. Finally, Milwaukee used a food and beverage tax to build Miller Park, home of Major League Baseball's Milwaukee Brewers.

- In 2007, the State of New Jersey created the "Sports and Entertainment District Urban Revitalization Act." Under this legislation, the community of Millville levied a 2% local food and beverage tax to fund a sports and entertainment district including a 500-acre motorsports park that hosts numerous events including NASCAR racing.

It should be noted that different states have different regulations regarding the use of funds generated by bed and/or food and beverage taxes. The cases outlined above are not exhaustive and should be viewed only as examples for further discussion.

Appendix D – Destination Panama City Venue Summary

Overall, the Consultant Team found a fair amount of "Tournament Friendly" yet very few "Anchor" facilities in the Panama City area. Below is a list of all venues evaluated by the Consultant Team along with areas of opportunities for some. Using the Sports Tourism Index©, the Consultant Team rated each facility on a scale of 1 to 5 (with 5 being superior) and its current quality (CQ). The Consultant Team also predicted what the potential future quality (PQ) likely could be if upgrades were made to each venue. The rating system used the following color codes:

Anchor Facility
Tournament Friendly
Not of Tournament Quality

Facility Name	Facility Type	National Average	Index Score & CQ	PQ
Bay Dunes Park	Cross Country	3.43	3.15	
Bay High School Theater Building	Other	2.91	2.2	
Callaway Recreational Complex	Diamonds	2.29	2.35	
Callaway Recreational Complex	Flat Fields	2.35	2.15	
Frank Nelson Park	Flat Fields	2.35	2.00	
Gretchen Nelson Scott Performing Arts	Other	2.91	2.2	
Gretchen Nelson Scott Performing Arts	Theater	2.83	2.1	
H.G. Harder's Park	Flat Fields	2.35	2.4	
H.G. Harder's Park	Diamonds	2.29	2.35	
Marjette Dunes Disc Golf Course	Disc Golf Course		TBD	
Oakland Terrace Park	Diamonds	2.29	2.15	
Oakland Terrace Park	Tennis (Indoor or Outdoor)	2.32	1.6	
Tommy Oliver Stadium	Outdoor Track	3.13	3.8	
Tommy Oliver Stadium	Football Stadium	2.51	2.15	

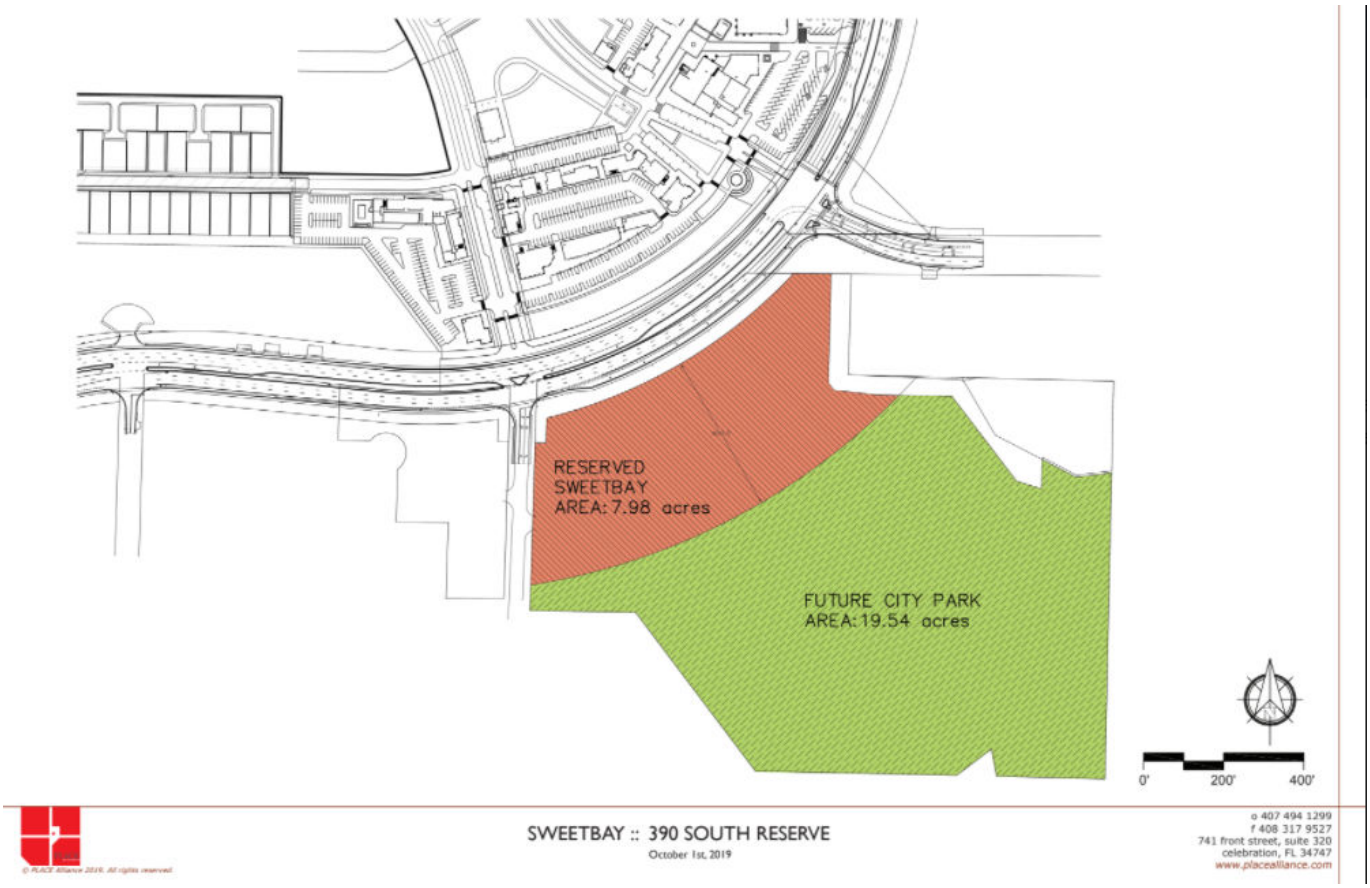
Appendix D (Cont'd) – Destination Panama City Venue Notes

Bay Dunes Park - Cross Country
Retired golf course site, over 250 acres with multiple course distances. For larger events parking could present an issue, consider overflow to HG Harder's Park. Possible site for hosting H.S. and collegiate XC meets.
Bay High School Theater Building
Currently under construction to be completed by end of 2022, performing arts center that could host Esports, cheer and dance competitions. Partnership with Bay School District to identify open calendar dates is recommended.
Callaway Recreational Complex - Diamonds
Five (5) diamond complex with the ability to host softball and little league events. Immediate opportunity to host local or regional events, parking could be a challenge with larger events. Possible facility enhancements of adding turf, additional seating, converting one ballfield to a "stadium/championship" venue.
Callaway Recreational Complex - Flat Fields
Featuring three (3) full size natural grass fields with lights, ideal for servicing community programming for football, lacrosse, and soccer. Consideration for hosting smaller local tournaments is an opportunity. Enhancements would include additional parking, turf, additional seating, scoreboards.
Frank Nelson Park - Flat Fields
A former diamond park that was converted to six (6) flat fields with lights. This site is challenged with parking options, field condition of natural grass, no scoreboards with minimal services. The consideration of use for this facility for sports tourism driving events is limited and should be included in regional master planning.
Gretchen Nelson Scott Performing Arts at Mosely H.S. - Other/Theater
Performance Auditorium that can be utilized for Esports, cheer and dance competitions.
HG Harder's Park - Diamonds
Diamond complex featuring 5 baseball and 2 softball/youth diamonds with lights, natural grass/dirt surface. Strong consideration should be given to enhancement of the facility, growth of diamonds (8 full size baseball + a stadium/championship field) as driver of sports tourism events. Complementary enhancements would include turf, parking, lighting, and Wi-Fi. Additional considerations would be identifying an operator to manage the facility.
HG Harder's Park - Flat Fields
Flat field complex featuring six (6) full-size and one (2) youth fields with lights, playing surface is natural grass with portable soccer goals. This venue should all fields stay intact should be immediately considered for hosting local and regional tournaments. Enhancements should include turf, scoreboards, covered bench areas for soccer, WIFI and additional parking to handle larger events.
Marjette Dunes Disc Golf Course
Located on retired golf course site, with 18 holes with a length of 5,815 feet and par of 6, site of the Northwest Florida Disc Golf Championship in April 2022, hosted by Bay County Disc Golf Club. Immediate opportunity to partner local promoter to grow the event as well as attract other region events.

Appendix D (Cont'd) – Destination Panama City Venue Notes

Oakland Terrace Park - Diamonds
Featuring four (4) full size, lighted diamonds with a fifth auxiliary field located by the recreation building. All diamond's playing surface are natural grass with dirt infields. Could serve as an overflow for larger tournaments, however parking is challenged, venue needs upgrades to include concession, scoreboards/press box. Additional enhancement recommendations would include turf to all fields and lights for the 5th diamond.
Oakland Terrace Park - Tennis
Six (6) outdoor tennis courts (hard courts), although lighting is in place it will not sufficient for hosting tournaments, parking for the facility is also challenged.
Tommy Oliver Stadium - Football Stadium
7,500-seat stadium with team locker rooms, ticket offices, video board, premium chairback seating, expanded press box and upgraded lighting and PA system. Playing surface is natural grass surrounded by 8-lane track. Partnership discussions with the school district to identify open dates for hosting potential events should be a priority. Suggested venue enhancement would be the installation of turf.
Tommy Oliver Stadium - Outdoor Track
Part of a $12 million upgrade the stadium features an eight (8) lane track with finish line laser timing system and other amenities to sufficient host local, regional, and national OTF events. Partnership discussions with the school district to identify open dates for hosting potential events should be a priority.

Appendix E – Destination Panama City
SweetBay Site Map



Appendix F – Destination Panama City
Sports Tourism Index™ Results

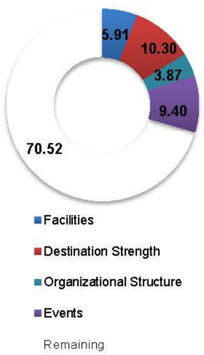
Destination Panama City (PCCDC)

FINAL SCORE **29.48**

SPORTS TOURISM INDEX REPORT

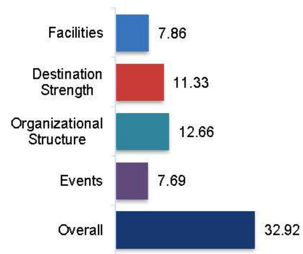
Market Size: Under 500k
Organization Type: DMO (CVB/Sports Commission)
Geographic Region: Southeast
Sports Budget: 15,001-20,000

SCORE BREAKDOWN



AVERAGE SCORES

Southeast



AVERAGE SCORES

Under 500k

RECOMMENDATIONS

Facilities

Your destination has a limited inventory of facilities to use in attracting tourism driving events. Immediate focus should be on working with your local event promoters to enhance and expand their events that drive tourism to the community. Future focus should be on driving a high level discussion in the community on facility development of new venues that would have tourism and also community uses.

Destination Strength

Your destination has some access challenges that are likely tied to limited air service and/or a small population within a days drive. It is likely that a focus on hotel product development would support the sports tourism market in the future.

Organizational Structure

Your organization has limited staff and budget dedicated to the sports market. It is most often the case at this level that the staff member responsible for sports also has other sales verticals which can hinder their ability to consistently build relationships in the sports market. Community wide support for organizations at this level is often a significant challenge. This would commonly include elected officials and corporate leaders in the community.

Events

Your organization hosts an average number of bid-in events, may create and/or owns a handful of its own championships, and services some events at a basic level. Organizations that score well in this area likely have the ability to work with their local promoters to create new tourism driving events and/or grow their current properties year over year. There is likely an opportunity for organizations in this category to enhance their efforts in servicing events in order to strengthen renewal rates in the future.

Appendix F – Destination Panama City
Sports Tourism Index™ Results (Cont'd)

Destination Panama City (PCCDC)

SPORTS TOURISM INDEX

INDUSTRY AVERAGES REPORT

Overall Scores ▲

	Your Score	Average Score	Difference
Facilities	5.91	8.22	-2.31
Destination Strength	10.30	12.07	-1.77
Organizational Structure	3.87	11.95	-8.08
Events	9.40	7.60	1.80
Overall	29.48	33.89	-4.41

Facilities Breakdown*

Participant-Based	Your Score	Average Score	Difference
Outdoor Track	3.80	3.15	0.65
Cross Country	3.15	3.43	-0.28
Flat Fields	2.40	2.35	0.05
Diamonds	2.35	2.29	0.06
Diamonds	2.35	2.29	0.06
Convention Center	1.40	2.24	-0.84

Spectator-Based	Your Score	Average Score	Difference
Football Stadium	2.15	2.50	-0.35
	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-

Destination Strength

	Your Score	Average Score	Difference
Tourism Drivers^	1	3.01	-2.01
Hotels*	1.30	1.13	0.17
Destination Accessibility*	4.00	2.11	1.89

Organizational Structure*

	Your Score	Average Score	Difference
Sports Staff	0.00	2.21	-2.21
Grant Program	2.00	2.03	-0.03
Board & Advisory	0.00	0.52	-0.52

Sporting Events

Number on an annual basis	Your Answer	Average Answer	Difference
Local Events	7	25	-18
Bid-In Events Hosted	0	8	-8
Events Serviced	7	29	-22

* Max score of 5
^ Max score of 10
▲ Max score of 25

Appendix F – Destination Panama City
Sports Tourism Market
5-Year Strategic Mission Pillars

In the future, Destination Panama City's enhanced sports tourism effort should sharpen its focus on three (3) key mission areas, or "Pillars." Each Pillar is driven by a different audience, all focused on increasing overnight stays and consumer spending in the Panama City area. This refined focus will help DPC enhance its messaging and will deliver directly on the organization's tourism mission, as well as positively impact the community's sports groups. The recommended Pillars are below along with their driving audiences/factors.

	Destination Panama City Sports Tourism Market 5-Year Strategic Mission Pillars		
Pillar	Enhanced Structure Events: Bid/Created/Owned (Short-Term)	Venue Enhancement (Long-Term)	Community Engagement (Ongoing)
Audience	Tourism Economic Development Rights Holders/NGBs Local Promoters High Schools/Colleges	Venue Managers Hospitality Leaders Elected Officials Economic Development Parks and Rec/Colleges Cities/Counties	Elected Officials C-Level Community Leaders Local Media Non-Profit Civic Groups Hospitality Community
Tactics	Strengthen Organization Grow Existing Events Create/Incubate New Events Continue Bid-In Events	Venue Needs Master Plan Venue Development Fund Funding Source(s) Defined Develop Indoor Space(s) Field Trip	Staff = Outwardly Focused "6&6" Lunches "4 Touch" Program Engage Board to Electeds Economic Impact Releases

Huddle Up Group

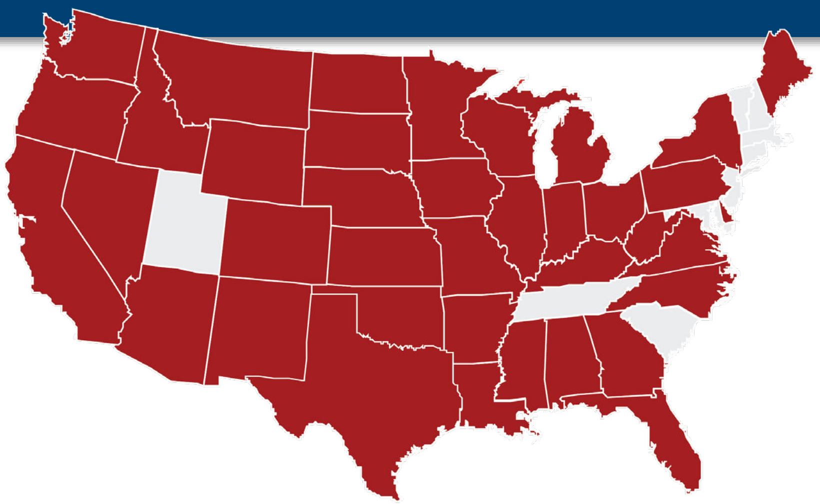
FOUNDED IN 2012

As a sports tourism industry consulting company, we continually strive for strategic growth and increased community collaboration for our partners.

From starting as athletes and coaches to becoming industry professionals, a major differentiator for the Huddle Up Group is our team's experience in the sports tourism trenches.

We have personally led or worked on/with:

- Award winning sports commissions
- Multiple Olympic Games
- Youth tournaments
- Facility development
- National championship management
- Final Fours
- All-Star Games
- New event creation
- Capital campaigns/fundraising
- College Bowl Games



160 PROJECTS

200+ DESTINATIONS + PARTNERS

50+ SPEAKNG ENGAGEMENTS

2017 NASC Superior Service Award Winner
The highest honor a consulting firm can earn from the National Association of Sports Commissions

DPC PROJECT SCOPE

Strategic Plan for Facilities + Sports Tourism (6 steps):

1. Sports Tourism Index™
2. Stakeholder Interviews & Survey
3. DPC Venue & SweetBay Site Audit
4. Proposed Facility & Impact Analysis
5. Playbook Delivery, Presentation of Findings
6. Post-Process Follow-Up

RESEARCH ACTION ITEMS

- Four (4) in person interviews w/area stakeholders.
- Eleven (11) phone interviews w/area stakeholders.
- Twenty (20) electronic survey responses from area stakeholders.
- 13 Site tours encapsulating 20+ sports and event venues.
- Primary research insights from USA Pickleball, USA BMX, USA Volleyball.
- Benchmarking w/best-in-class venues regionally & nationally.
- A rating of DPC through the Sports Tourism Index™.

UNIVERSAL "TRUTHS"

1. Desire to enhance sports opportunities in Panama City.
2. Many existing facilities are aging or damaged and in need of investment in order to drive sports tourism.
3. The organizational structure for supporting and driving sports tourism to Panama City is not sustainable.
4. Local/Regional competition is strong (new facility development).
5. Panama City is well aligned geographically.

SWOT ANALYSIS

S – Location, Staff & Community Leadership, Partnership Presence.

W – Facilities, Dedicated Sports Staff, Identity and Goals of DPC.

O – Existing Facilities, Community Engagement, Partnerships, Local Programming.

T – Local/Regional Competition, Investment, Funding, Masterplan.

PANAMA CITY INDEX TAKEAWAYS

- Total Index Score of 29.48 (Southeast average = 40.35)
  - Facilities = Under indexed / 5.91 vs. 9.40
  - Destination Strength = Slightly under indexed / 10.30 vs. 11.15
  - Organization Structure = Under indexed / 3.87 vs. 12.18
  - Events = Slightly under indexed / 9.40 vs. 7.62
- DPC Budget & Staff development is a significant opportunity.
- Facility development & enhancement is likely a growth opportunity.

RECOMMENDATIONS

<u>Primary – Sports Tourism Marketing</u>

1. Dedicated Sports Staff
2. Technology Use
3. External Focus

<u>Secondary – Facility Development Opportunities</u>

1. Indoor Hardwood Court Venue (New)
2. Indoor Pickleball Venue (New)
3. Venue Enhancement (Existing)
4. Community-Wide Sports Tourism Facility Master Plan

SWEETBAY TAKEAWAYS

- 19.54-acre proposed site.
  - Reduced to 16-acres
  - Added Fire Station & Retention pond
- 30-acre minimum consideration.
- DPC/PC should identify larger parcel of land.

SPORTS FACILITY BENCHMARKS

Facility Type	Anchor	Tournament Friendly
Flat Fields	Minimum 16 fields	8-15 fields
Pool	50m/8-10 lanes with diving well	25m with diving well
Diamonds	Minimum 12 fields	8-11 fields
Hardwood Courts	Minimum 8 Basketball/ 16 Volleyball	4 Basketball/8 Volleyball
Ice	3+ Sheets Hockey/ 6+ Sheets Curling	2 Sheets Hockey/ 4 Sheets Curling
Tennis	Minimum 12 courts	Minimum 6 courts
Pickleball	40-60 Courts (National)	8-16 Courts (Local) 24-32 Courts (Regional)
Indoor Track	200 meter/6 lanes/banked	200 meter/6 lanes

Best in Class:

- ESPN Wide World or Sports (FL)
- Elizabethtown Sports Complex (KY)
- Grand Park (IN)
- LakePoint Sports Complex (GA)
- Myrtle Beach Sports Center (SC)
- Hoover MetPlex (AL)
- Rocky Mount Events Center (NC)
- Rock Hill Sports Complex (NC)
- Champions Center (WI)

HARDWOOD FACILITY FEATURES (INDEX)

	AVERAGES		
	Top 10	Overall	Difference
# Bball Courts	12.3	3.4	8.9
# Vball Courts	21.1	4.7	16.4
Court Surface (Hardwood)	80%	75%	5%
Scoreboard	100%	82%	18%
Scorers Table	100%	90%	10%
Team Benches	60%	36%	24%
PA System	60%	60%	0%
Locker Rooms	70%	69%	1%
Permanent concession stand(s)	100%	77%	23%
Permanent restrooms	100%	100%	0%
Permanent Wi-Fi	100%	89%	11%
Parking	100%	98%	2%
ADA Compliant	100%	99%	1%
Auxiliary meeting rooms	5.1	2.9	2.2
Ability to book (Definitely yes)	90%	51%	39%
Score	3.95	2.80	1.15

Best in Class:

- Champions Center (WI)
- Virginia Beach Sports Center (VA)
- Omaha Sports Academy (NE)
- Grand Park (IN)
- Myrtle Beach Sports Center (SC)
- Hoover Rec Plex (AL)
- Rocky Mount Events Center (NC)
- Rock Hill Sports Complex (NC)

NEW FACILITY PROPOSED FEATURES

- 4-8 Courts for basketball (converts to 8-16 volleyball courts).
- Championship court to accommodate at 1,000 spectators.
- Scoreboards, shot clocks, benches, PA, locker rooms.
- A press table dedicated to each court.
- Ancillary meeting space for tournament staff & officials.
- Permanent restrooms, concession stands, and Wi-Fi.
- Parking with min. 3.5 permanent spaces per 1,000 sq. ft.
- A common area to accommodate athletes and spectators.
- ADA compliant.
- DPC to have “Favored Nation Status”.

NEW FACILITY IMPACT PROJECTIONS (25%)*

- 11 new state, regional, and national tournaments.
- Nearly 23,000 total attendees relating to competitions.
- Over $6 million in direct visitor spending.
- More than 11,500 hotel room nights.
- Hotel Occupancy Taxes of nearly $47,000.
- Sales Tax collections of nearly $70,000.
- Total sports tourism related taxes over $116,000.
- Example: Off-peak (Dec-Feb) projected nearly $3 million in direct spending.

* - NEW business related to a new indoor venue (Southeast).

FUNDING MODELS

National Examples

- Hotel/bed taxes.
- Prepared food (restaurant) taxes.
- Sales taxes.
- Tourism Improvement Districts (TIDs).

DPC Applicable

- Incremental hotel/bed tax collections via growth of hotel inventory.
- Local Merchant Tax – 1% applied to qualified short-term lodging.

HUG Huddle Up Group

Visit DPC
Sports Tourism Market
5-Year Strategic Mission Pillars

Pillar	Enhanced Structure Events: Bid/Created/Owned (Short-Term)	Venue Enhancement (Long-Term)	Community Engagement (Ongoing)
Audience	Tourism Economic Development Rights Holders/NGBs Local Promoters High Schools/Colleges	Venue Managers Hospitality Leaders Elected Officials Economic Development Parks and Rec/Colleges Cities/Counties	Elected Officials C-Level Community Leaders Local Media Non-Profit Civic Groups Hospitality Community
Tactics	Strengthen Organization Grow Existing Events Create/Incubate New Events Pursue Bid-In Events	Venue Needs Master Plan Venue Development Fund Funding Source(s) Defined Develop Indoor Space(s) Field Trip	Staff = Outwardly Focused “6&6” Lunches “4 Touch” Program Engage Board to Electeds Economic Impact Releases

NEXT STEPS
"KING FOR A DAY"

Marketing

- Grow budget & staff to activate sports tourism marketing.
- Leverage technology to attract new events.
- Build out an outreach program (externally facing).

Facilities

- Build support for TID enabling legislation (state).
- Identify partners for facility development (land & sport orgs.).
- Develop a regional masterplan for sports venues.

THANK YOU FOR YOUR TIME!

ERIC@HUDDLEUPGROUP.COM
DEAN@HUDDLEUPGROUP.COM

Ratification of FM Contract 02082022

Panama City Community Development Council
dba Destination Panama City
Agenda Item Summary

1. PRESENTER NAME:	2. MEETING DATE:
Jennifer M. Vigil President & CEO	2/8/2022

3. REQUESTED MOTION/ACTION:

Board Ratify CEO Vigil's extension of the Fahlgren Mortine Contract for Marketing Agency or Record services.

4. AGENDA		5. IS THIS ITEM BUDGETED (IF APPLICABLE)?: YES ☐ NO ☐ IF NO, STATE ACTION REQUIRED ☐ N/A
PRESENTATION	☐	BUDGET ACTION:
PUBLIC HEARING	☐	FINANCIAL IMPACT SUMMARY STATEMENT:
CONSENT	☐	
REGULAR	☒	DETAILED ANALYSIS ATTACHED?: YES ☐ NO ☐

6. BACKGROUND: (WHY IS THE ACTION NECESSARY, WHAT ACTION WILL BE ACCOMPLISHED, (WHO, WHERE, WHEN & HOW)

The Fahlgren Mortine marketing agency of record contract expired in December 2021. CEO Vigil executed the agreement to extend the contract for one additional year.

Board should ratify CEO Vigil's execution of the contract extension and provide guidance on whether or not there is a desire to prepare an RFQ for Marketing Services for FY23.

FAHLGREN MORTINE

Amendment #2
to
Service Agreement

This Amendment #1 to the Service Agreement ("Amendment") is made effective as of the 19th day of December, 20 21 (the "Effective Date") by and between Destination Panama City ("Client") and Fahlgren Inc. (dba Fahlgren Mortine) ("Fahlgren"). Client and Fahlgren may each be referred to herein as a "Party" and collectively, the "Parties".

WHEREAS, the Parties entered into a Service Agreement dated December 10, 2019 (referred to herein as the "Agreement");

WHEREAS, the Parties entered into Amendment #1 to Service Agreement dated September 3, 2020;

WHEREAS, the Parties now desire to further amend the term of the Agreement; and,

NOW THEREFORE, in consideration of the foregoing recitals and the mutual promises and covenants contained herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledge, the Parties hereby agree to amend the Agreement as follows:

1. **Term Extension.** The Parties desire to extend the term of the Service Agreement for the twelve (12) month period from December 10, 2021 through December 9, 2022.
2. **Rates.** Client agrees that Fahlgren's fixed hourly rate for all services, as outlined in Exhibit 1B, shall be $160 per hour during the extended term. The administrative function rate of $75 per hour and the media commission of 7% of gross shall remain.
3. **No other changes.** Except to the extent modified herein, the Agreement shall remain in full force and effect, unchanged and binding upon the Parties in all other material respects. In the event of any conflict between the Agreement and this Amendment, this Amendment shall prevail.
4. **Defined Terms.** Unless otherwise defined herein, all capitalized terms herein shall have the original meanings set forth in the Agreement.

WHEREFORE, the parties hereto have caused this Amendment to be executed by their duly authorized representatives.

Destination Panama City	**Fahlgren, Inc.**
By: J Vigil	By: Amy Bagner
Name: Jennifer Vigil	Name: Amy Bagner
Title: President & CEO	Title: Account Director
Date: December 19, 2021	Date: December 19, 2021

Panama City Community Development Council
dba Destination Panama City
Agenda Item Summary

1. PRESENTER NAME: Jennifer M. Vigil President & CEO	2. MEETING DATE: 2/8/2022

3. REQUESTED MOTION/ACTION:

Board authorize CEO Vigil to seek out proposals for Grant Writing Assistance

4. AGENDA	5. IS THIS ITEM BUDGETED (IF APPLICABLE)?: YES ☐ NO ☐ IF NO, STATE ACTION REQUIRED ☐ N/A
PRESENTATION ☐ PUBLIC HEARING ☐ CONSENT ☐ REGULAR ☒	BUDGET ACTION: FINANCIAL IMPACT SUMMARY STATEMENT: DETAILED ANALYSIS ATTACHED?: YES ☐ NO ☐

6. BACKGROUND: (WHY IS THE ACTION NECESSARY, WHAT ACTION WILL BE ACCOMPLISHED, (WHO, WHERE, WHEN & HOW)

There are a number of special projects that CEO Vigil is currently working on. Including sports facility enhancement funding, nearshore artificial reef funding, St. Andrews School funding, and Humanities Programming Grants. CEO Vigil is requesting board authorization to seek out proposals or draft an RFP to engage grant writers to assist in the efforts to complete these projects.