



DESTINATION :

# *PANAMA CITY*

Tourism Development & Economic Opportunity

Final Report  
2015/12/15

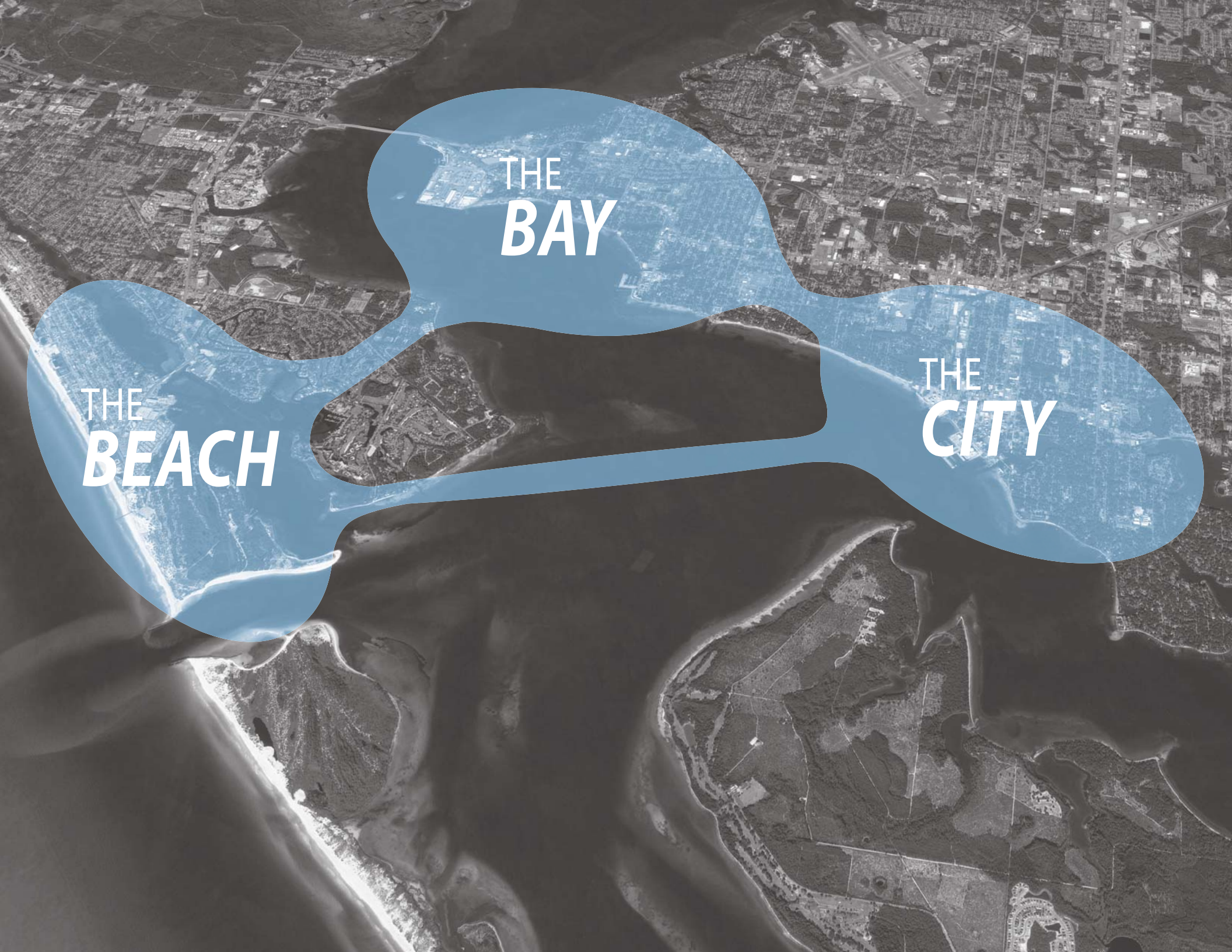




# CONTENTS

|           |                       |     |
|-----------|-----------------------|-----|
|           | <i>PREFACE</i>        | 1   |
| <b>01</b> | <i>LOOKING BACK</i>   | 9   |
| <b>02</b> | <i>HERE AND NOW</i>   | 34  |
| <b>03</b> | <i>MOVING FORWARD</i> | 54  |
| <b>04</b> | <i>APPENDIX</i>       | 132 |





THE  
**BAY**

THE  
**BEACH**

THE  
**CITY**

# PREFACE

The team of The Sports Force, Odell, International Stadia Consultancy, LLC (ISC, LLC), Lou Hammond and Associates, Young Strategies, and Robin Malpass & Associates has provided an in-depth Tourism Development & Economic Opportunity Study for the City of Panama City.

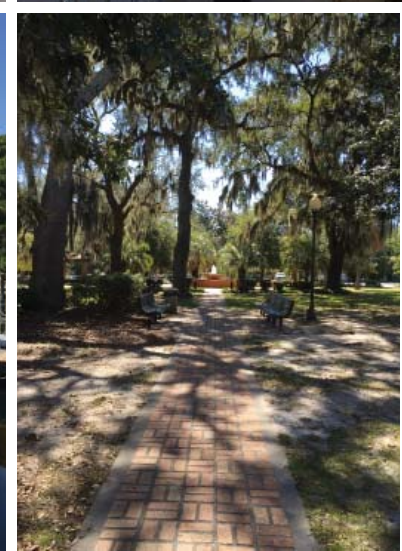
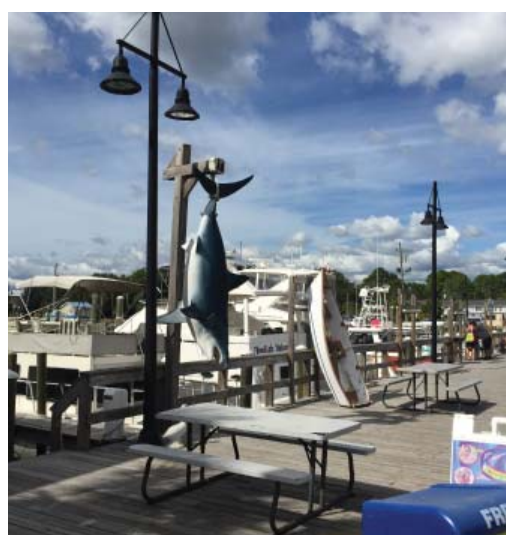
The scope focuses on saturating our design team within the City of Panama City and the surrounding region; with the intent to fully identify and analyze existing assets of Panama City, Panama City Beach, and the Higher Education Hub (FSU - Panama City and Gulf Coast State College). It seeks to combine these existing assets with new catalyst venues to create a unique destination.

We sincerely appreciate the opportunity to provide services for this Tourism Development & Economic Opportunity Study. We believe the tangible content associated with the study will ensure architectural, functional, and financial success for the City of Panama City.

The Tourism Development Study is based on leveraging a unique set of circumstances that are authentic to Destination Panama City including:

- Location: Close proximity to Panama City Beach, a thriving, internationally-recognized destination that attracts twelve million annual visitors.
- Higher Education Hub: Anchored by Florida State University - Panama City and Gulf Coast State College.
- Creative Conducive: Affordable lifestyle surrounded by accessible natural beauty.
- Sense of place: A series of districts and neighborhoods each with their own distinctive character creates a unique sense of place.









# SUMMARY

The pages that follow present a study on Panama City's current visitor profile and a detailed look at the destination's numerous assets that are prime for tourism development. We also include activities and events that on their own attract visitors as well as distinctive qualities that contribute to the overall visitor experience. Additional thoughts are included for future consideration, ranging from new services to infrastructure preservation and enhancement. All findings and recommendations serve one purpose: to attract new audiences to Panama City and Bay County on a year-round basis. By showcasing Panama City's rich cultural heritage and diverse communities, we have the opportunity to reach travelers seeking enrichment and outdoor pursuits in a scenic waterfront setting. The effects of tourism can be far reaching – from the creation of high-paying jobs that will benefit generations and the attraction of new businesses and residents. After all, everyone is a visitor first.



LEARN

DINE

STAY

HEAL

SHOP

RECHARGE

CONNECT

PLAY

DISCOVER

LIVE

WORK





# PROCESS

The Study reflects an expansive vision for Destination Panama City. It is based on market research, industry expertise and an authentic sense of place.

- Live
- Stay
- Shop
- Recharge
- Work
- Dine
- Play
- Connect
- Discover
- Learn
- Heal



ST.  
ANDREWS  
DISTRICT

DOWNTOWN  
DISTRICT

DOWNTOWN  
NORTH  
DISTRICT

MILLVILLE  
DISTRICT





# PROCESS

Four (4) key districts are a focus of this study:

- Downtown District
- St. Andrews District
- Downtown North District
- Millville District





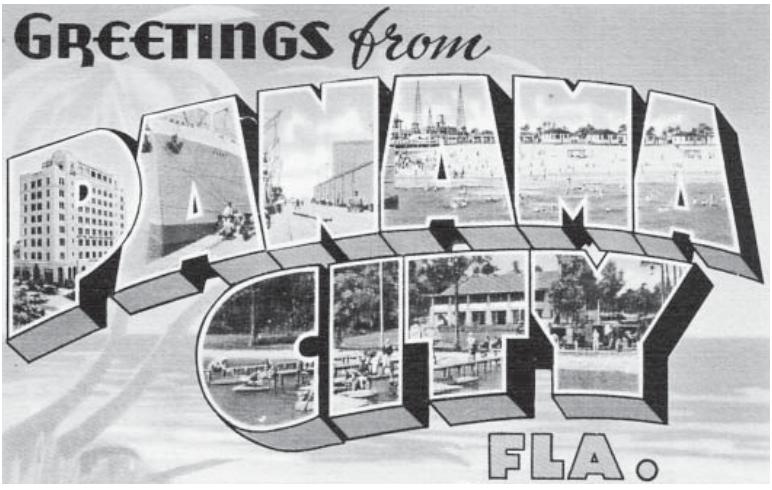




CHAPTER 1

# ***LOOKING BACK***



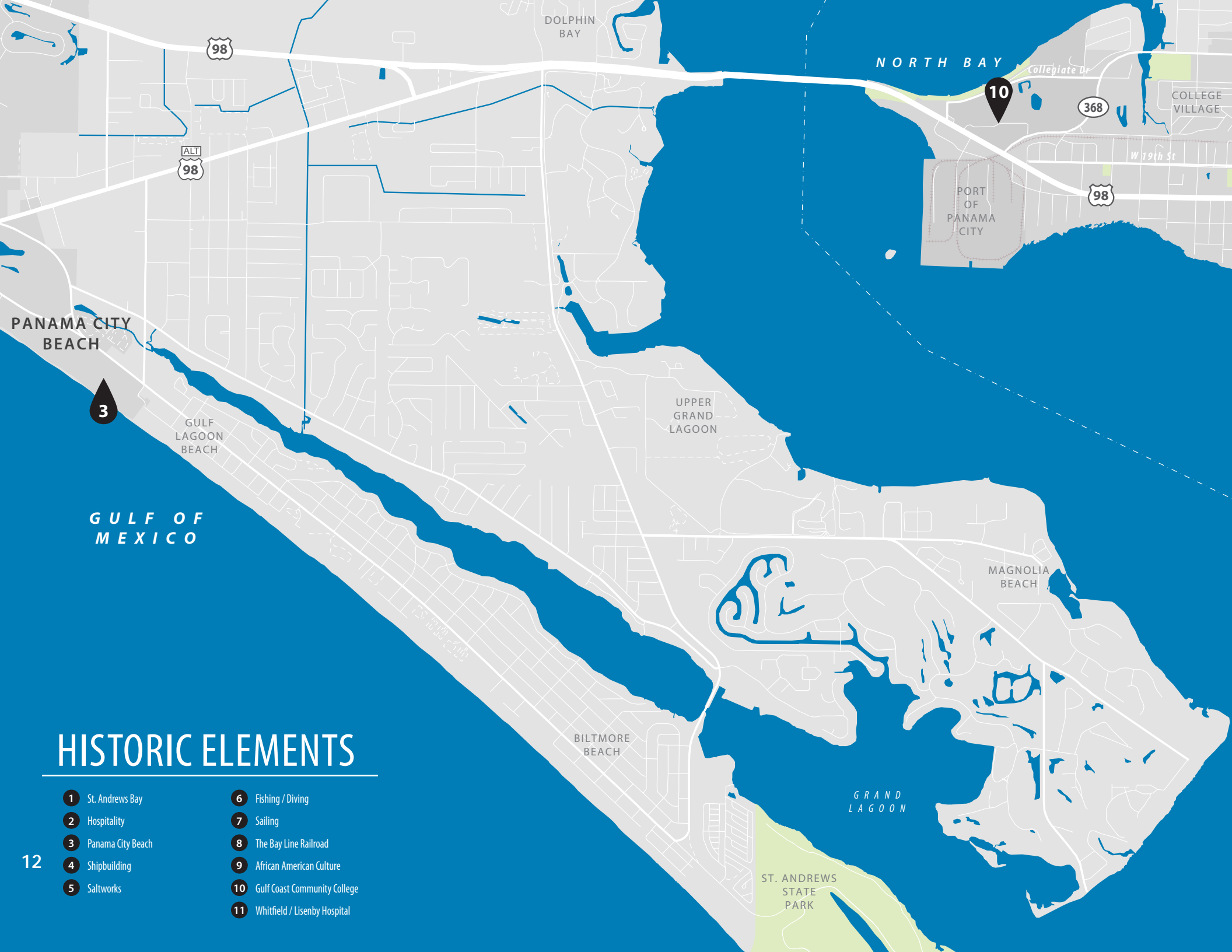




# HISTORIC PANAMA CITY "THE BAY CITY"





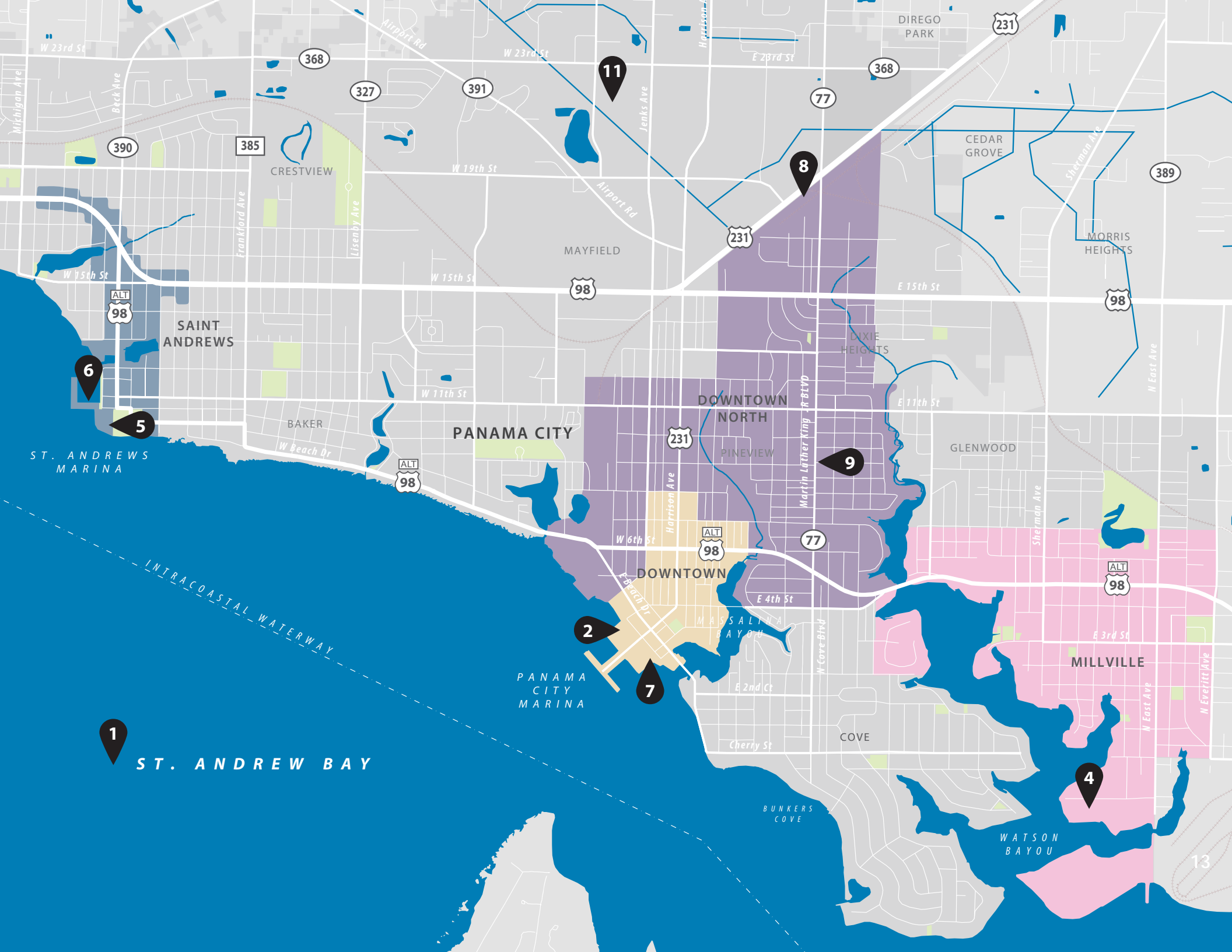


GULF OF MEXICO

# HISTORIC ELEMENTS

- 1 St. Andrews Bay
- 2 Hospitality
- 3 Panama City Beach
- 4 Shipbuilding
- 5 Saltworks
- 6 Fishing / Diving
- 7 Sailing
- 8 The Bay Line Railroad
- 9 African American Culture
- 10 Gulf Coast Community College
- 11 Whitfield / Lisenby Hospital





1

ST. ANDREW BAY

2

7

6

5

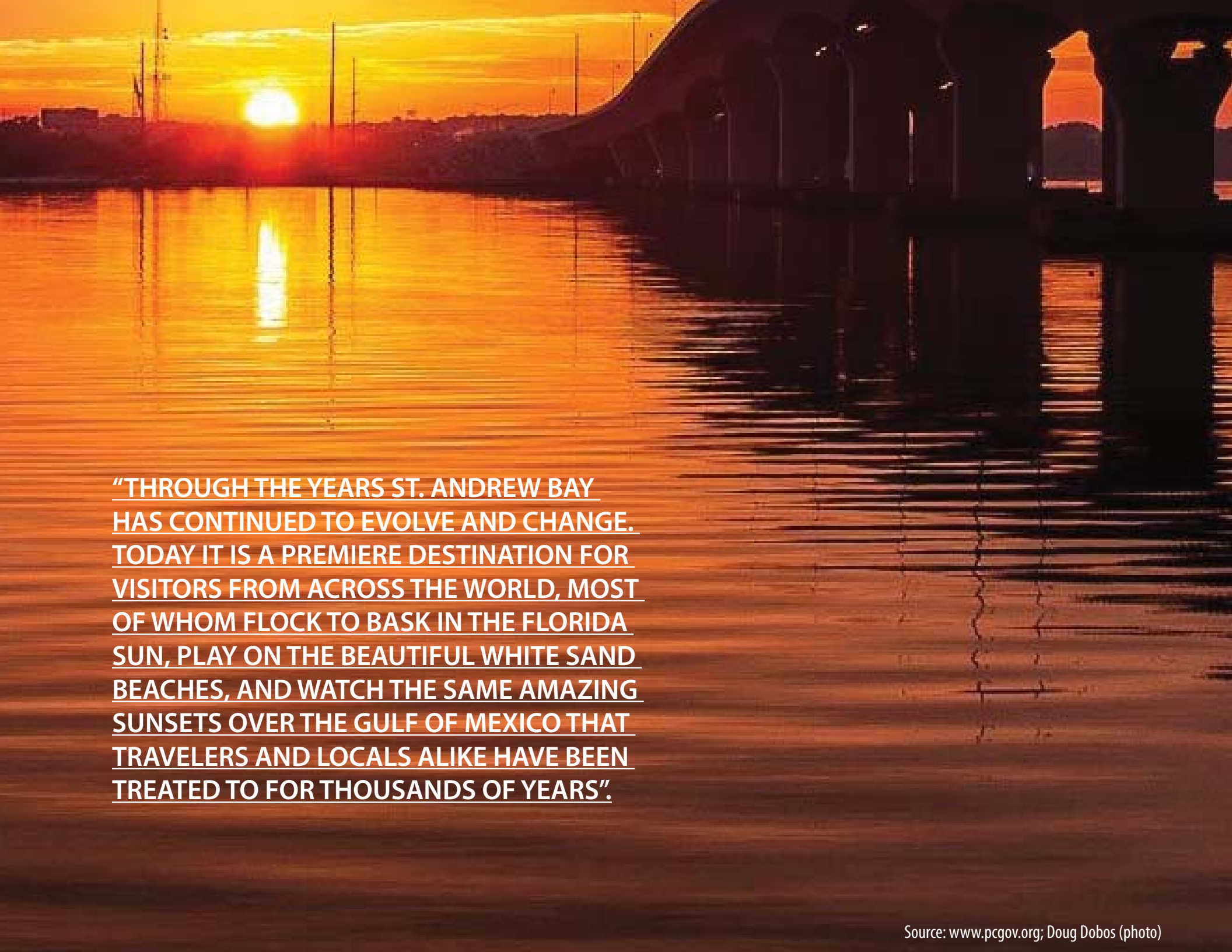
11

8

9

13



A photograph of a sunset over a body of water. The sun is low on the horizon, casting a bright orange glow across the sky and reflecting on the water. In the foreground, a dark bridge with arches spans across the water. The overall scene is serene and picturesque.

"THROUGH THE YEARS ST. ANDREW BAY  
HAS CONTINUED TO EVOLVE AND CHANGE.  
TODAY IT IS A PREMIERE DESTINATION FOR  
VISITORS FROM ACROSS THE WORLD, MOST  
OF WHOM FLOCK TO BASK IN THE FLORIDA  
SUN, PLAY ON THE BEAUTIFUL WHITE SAND  
BEACHES, AND WATCH THE SAME AMAZING  
SUNSETS OVER THE GULF OF MEXICO THAT  
TRAVELERS AND LOCALS ALIKE HAVE BEEN  
TREATED TO FOR THOUSANDS OF YEARS".



LIVE

# ST. ANDREW BAY

**ST. ANDREWS BAY IS PANAMA CITY'S GREATEST RESOURCE AND HAS THE MOST POTENTIAL FOR FUTURE TOURISM (CH 3 - MOVING FORWARD). MANY CATALYST VENUES WERE MOTIVATED BY UTILIZATION OF AND ENGAGEMENT WITH THE BAY, SO THE CITY CAN RIGHTFULLY EARN THE NICKNAME OF: "THE BAY CITY"**

Before modern settlement began in the 1800s, the St. Andrew Bay area was home to Native Americans. Then, as today, the abundant fish in the Gulf of Mexico and St. Andrew Bay provided fresh seafood to those original locals, as well as visitors to the sandy white shores.

Spanish explorers gave the St. Andrew Bay its present name in the 1500's as they explored the northeast gulf coast. Pirates also found the deep pockets of the Bay to be a prime spot to lie in wait for richly laden European ships en route to Mexico or Spain. An old Spanish galleon and a 700-pound cannon were unearthed during construction of a motel in the early 60s, proving the presence of such pirates... and opening the door to the possibility of pirate treasure!

Thanks to the sinking of modern day ships for artificial reefs, the bay and the surrounding waters are well known with sport divers, who find treasure of a different kind in colorful marine life and underwater adventure.

Wild dolphins are commonly seen in the waters of St. Andrews Bay; they are easily spotted when the waters are smooth in the mornings. In shallower waters, St. Andrews Bay is known for vast schools of mullet, red fish and speckled trout. Occasionally a manatee is spotted in the bay as well.



STAY + SHOP

# HOSPITALITY





Many of those long ago landmarks are gone forever, only remembered in the minds of the people who lived through the changes. But, the history of a place never really leaves it. History is part of the fabric of the Gulf Coast, and those interested in learning more can find many ways to explore the past.





The sugar white beaches of Panama City and Northwest Florida are among the most historic and most beautiful in the world. Although the area was alive with settlers and the St. Andrew Bay was even the site of a skirmish during the Civil War, Panama City Beach's history doesn't officially begin until 1936, when the city was incorporated into Bay County. The city's name was reportedly based on being the nearest American port to the newly opened Panama Canal. Surrounding the new city were other, small cities known as West Panama City Beach, Long Beach and Edgewater. Some years later, the four merged to form a single chartered government, which kept the name of Panama City Beach.

The beachfront became a viable tourism destination after the St. Andrews Bay Bridge was built in 1929, connecting the barrier island to the mainland. Originally a low-rise community of cottages, mom-and-pop motels and laid-back bars like "The Hang Out," the beachfront resort area has evolved as real estate values rose and word spread about its 27-mile white sandy beach and spectacular Gulf of Mexico sunsets.

Gideon Thomas built the Panama City Hotel in 1935 and aggressively marketed tourism at a time most locals were only interested in farming. Beginning in the early 1990s, it became known as Florida's top Spring Break location as it welcomed student revelry shunned by once-dominant destinations Fort Lauderdale and Daytona Beach.

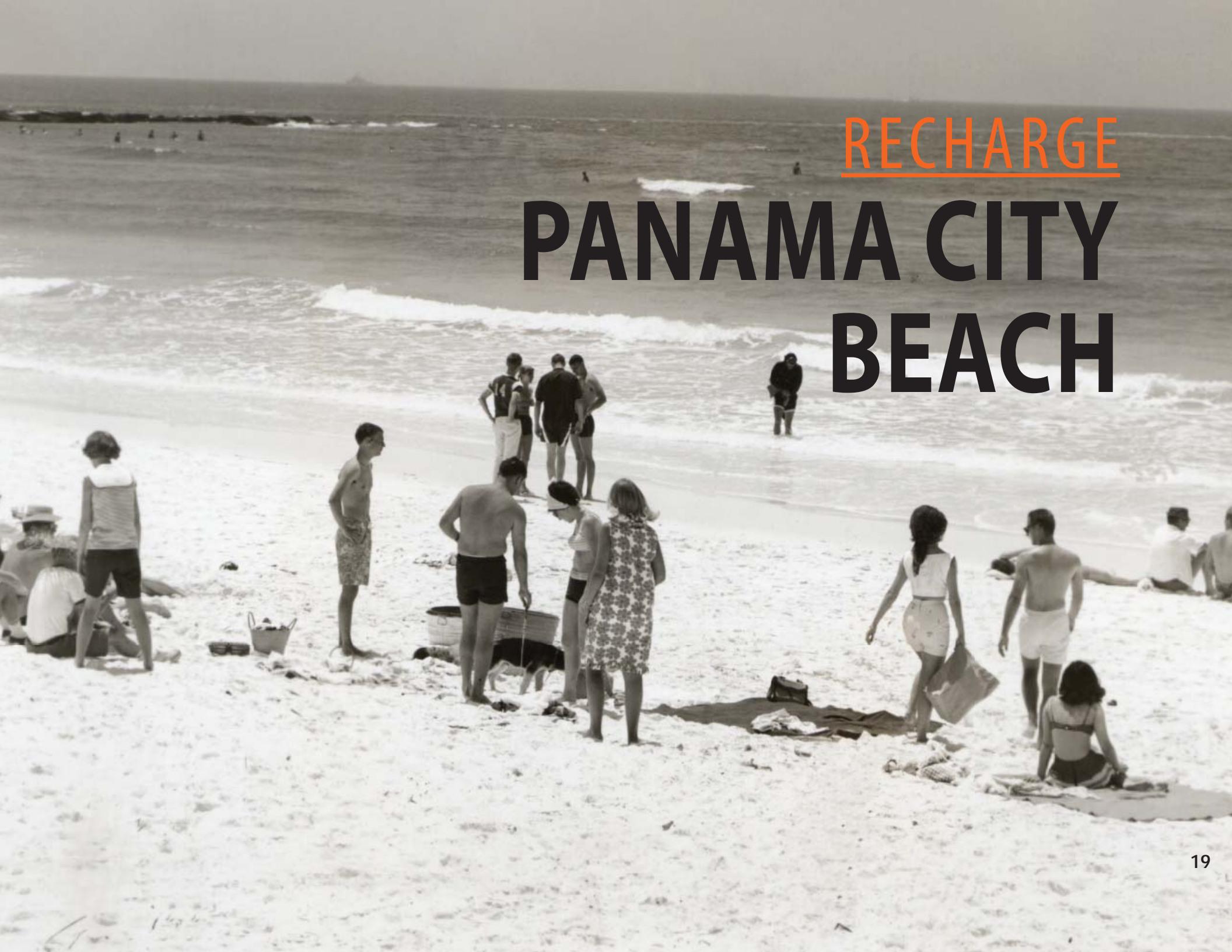
Through the years the face of Panama City Beach has continued to evolve and change. Today it is a premiere destination for visitors from across the world, most of whom flock to bask in the Florida sun, play on the beautiful white sand beaches, and watch the same amazing sunsets over the Gulf of Mexico that travelers and locals alike have been treated to for thousands of years.





RECHARGE

# PANAMA CITY BEACH

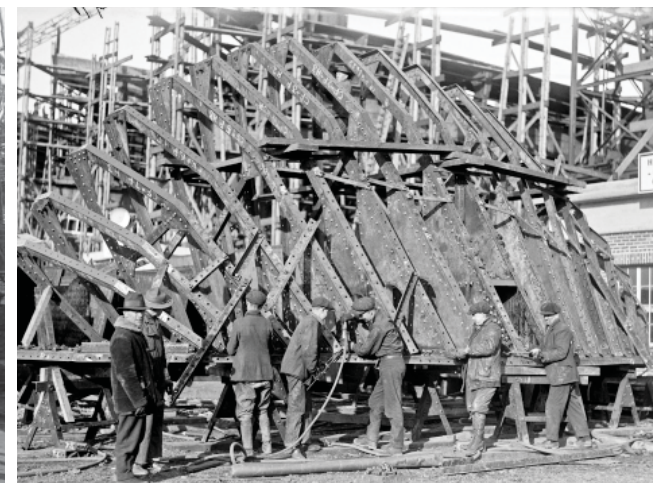
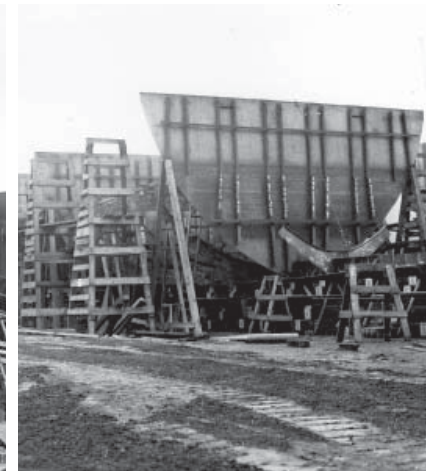
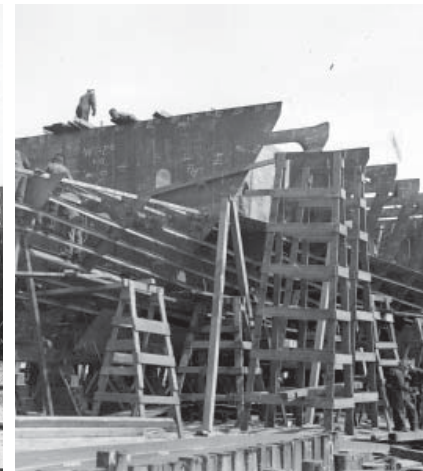
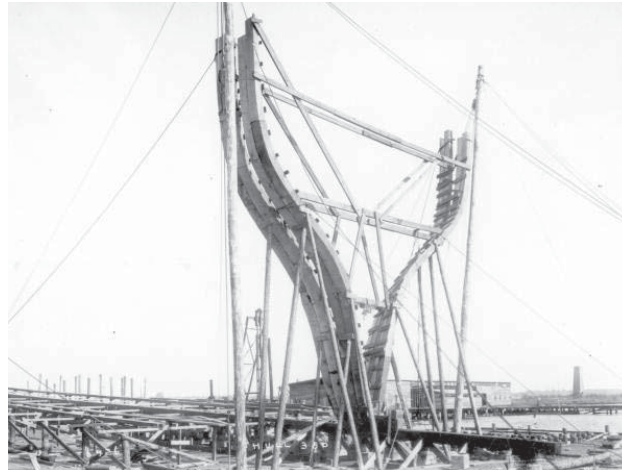




In 1918 the Panama City Chamber Of Commerce appointed a committee to lobby for a shipyard in Millville. As a result there was a contract signed with the U.S. Shipping Board Emergency Corporation to construct eight barges at the Millville site. The ship building facility employed 400 people and was located adjacent to the mill at the end of Sherman Avenue. Gulf Shipbuilding Company also built a second shipyard on Watson Bayou.

During WWI, the government designated Millville as the site for construction of eight three-masted schooner barges but only one was built before the war ended. It was named Millville.

During WWII, Panama City's operation was an emergency yard, built with 6 ways in the fifth wave of shipbuilding expansion. The shipyard was known as the Wainwright Shipyard, after General Jonathan Wainwright. Wainwright Shipyard opened on April 12, 1942 near the east side of the Hathaway Bridge. It produced 102 Liberty ships and six tankers. The shipyard closed after the war, but was still used for ship scrapping for several years and is now part of the Port of Panama City.



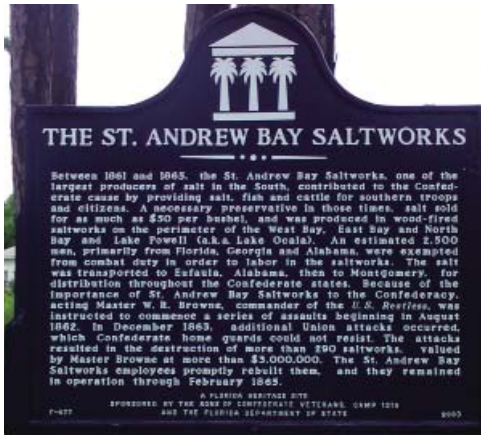
**PANAMA CITY'S SHIPBUILDING PAST WAS USED AS THE INSPIRATION FOR A VARIETY OF POTENTIAL CATALYST VENUES (CH 3 - MOVING FORWARD), INCLUDING THE MARITIME MUSEUM & SHIPBUILDING TECHNOLOGY CENTER AND THE REDEVELOPMENT OF WATSON BAYOU PARK**





WORK  
**SHIPBUILDING**



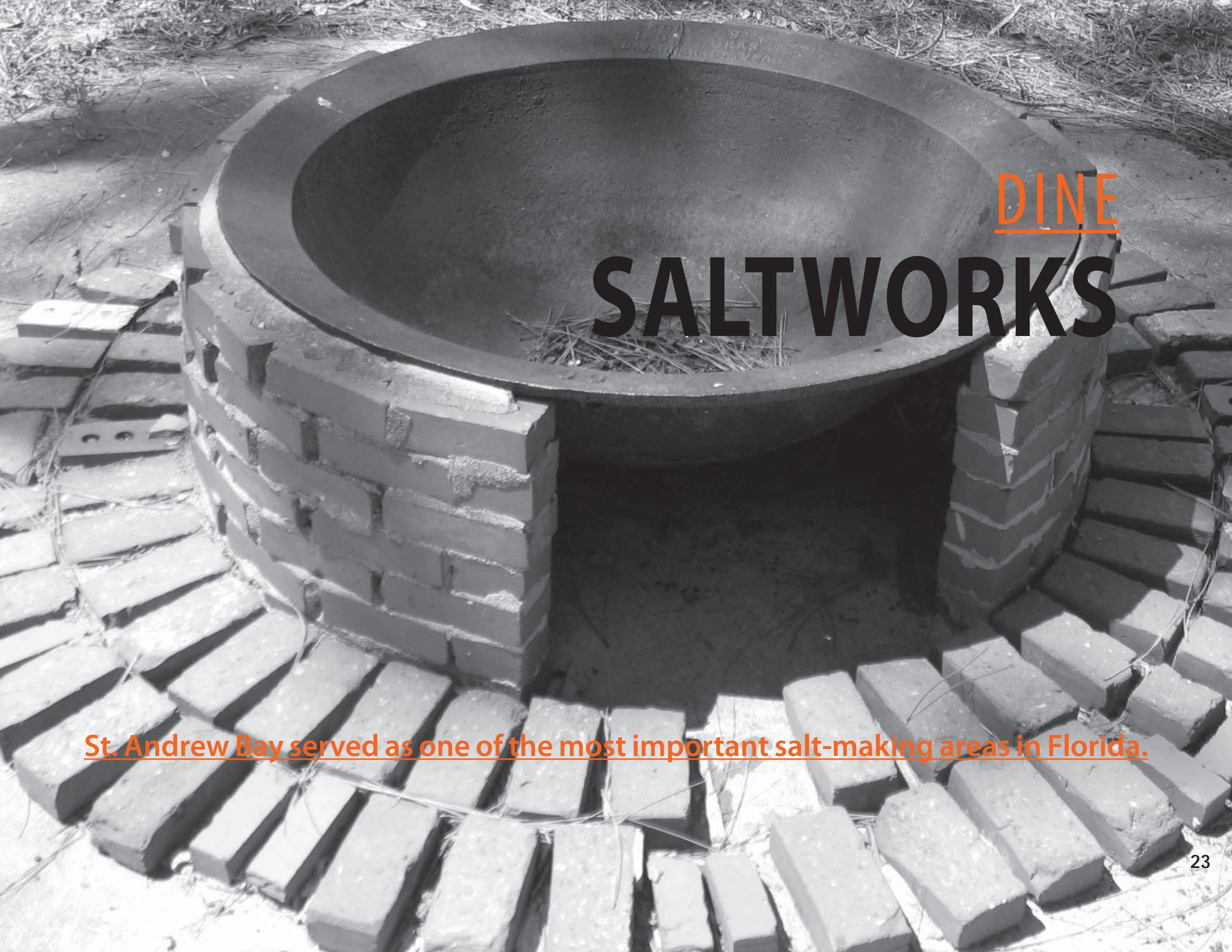


A three-year drought in the St. Andrew Bay area caused a large portion of the population to turn to salt making. Salt became one of the Confederacy's greatest needs due to the blockade. By 1862, St. Andrew Bay served as one of the most important salt-making areas in Florida.

There were literally hundreds of salt works along the bays in this part of Florida, which were constantly being attacked by gunboats and landing parties from the US Blockading squadron. Today there are two monuments commemorating this industry, both featuring historic cast iron kettles said to have been used during this short-lived but essential industry.







DINE  
**SALTWORKS**

St. Andrew Bay served as one of the most important salt-making areas in Florida.

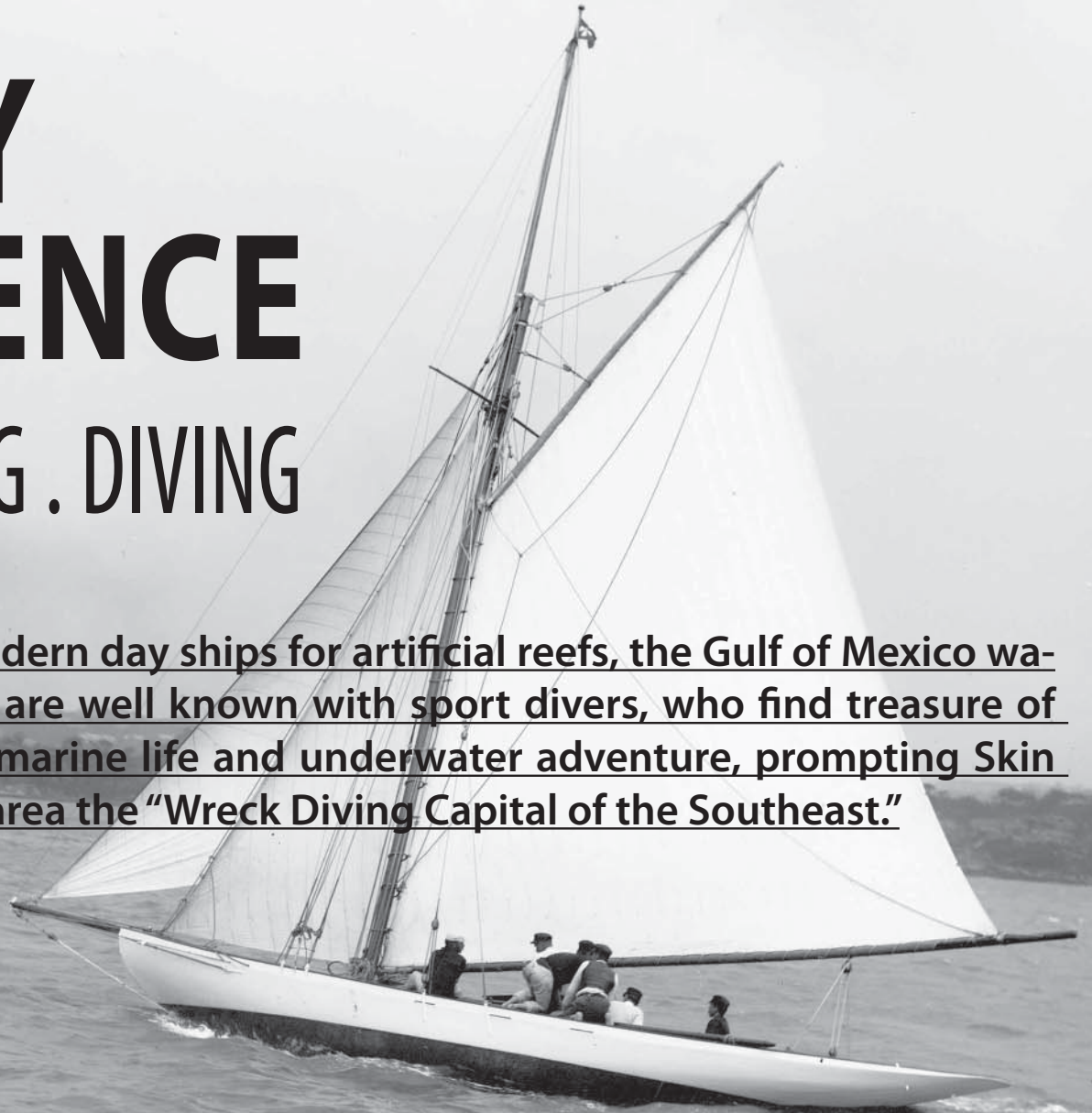


PLAY

# THE BAY EXPERIENCE

SAILING . FISHING . DIVING

Thanks to the sinking of modern day ships for artificial reefs, the Gulf of Mexico waters off Panama City Beach are well known with sport divers, who find treasure of a different kind in colorful marine life and underwater adventure, prompting Skin Diver Magazine to dub the area the "Wreck Diving Capital of the Southeast."







The water is a large part of the economy in Bay County and specifically in Panama City. The flags of six nations have flown over the St. Andrew Bay and Panama City Beach area of Florida. Pirates sailed the coastal waters and Confederate and Union troops fought for control of the shorelines.

Sprawling more than 68,000 acres behind the protection of the Gulf of Mexico shoreline, St. Andrews Bay in Panama City, Florida teems with aquatic life. The estuary stretches for more than 20 miles and includes a wealth of saltwater flats, seagrass beds and deep channels that harbor a wide variety of game fish. Anglers can find ample ways to fish the clear waters of this extensive ecosystem that empties through a narrow channel into the Gulf.



Today people can enjoy snorkeling, fishing, dolphin watching or just relaxing with the locals along the shores or in the waterways.





# CONNECT

# THE BAY LINE

## ATLANTA & ST. ANDREWS BAY RAILROAD



### THROUGH PULLMAN SERVICE

Between  
PANAMA CITY, FLA., AND ATLANTA, GA.

Via

A&SABRY, Panama City, Fla. - Dothan, Ala. — ColGaRy, Dothan, Ala. - Atlanta, Ga.

| A&SABRY         |                   | COFCA RY  |          |
|-----------------|-------------------|-----------|----------|
| 5:20 PM Lv.     | Panama City, Fla. | (CT) Arr. | 10:55 AM |
| 6:33 PM "       | Cottondale, Fla.  | Lv.       | 9:37 AM  |
| 7:20 PM Arr.    | Dothan, Ala.      | " Lv.     | 8:50 AM  |
| COFCA RY        |                   |           |          |
| 7:30 PM Lv.     | Dothan, Ala.      | " Arr.    | 8:40 AM  |
| 11:05 PM Arr.   | Albany, Ga.       | (ET) Lv.  | 7:05 AM  |
| 11:15 PM Lv.    | Albany, Ga.       | " Arr.    | 6:30 PM  |
| 4:05 AM "       | Macon, Ga.        | " Lv.     | 2:45 AM  |
| (1)7:00 AM Arr. | Atlanta, Ga.      | " Lv. (2) | 11:10 PM |

SMOOTH DIESEL POWER — MAID SERVICE — INDIVIDUAL SEAT, RECLINING COACHES  
CONNECTIONS IN ATLANTA FOR TRAINS IN ALL DIRECTIONS

- (1)—Sleeper may be occupied until 8:00 A.M.  
(2)—Sleeper open for occupancy at 10:00 P.M.



**As with many railroads in the region, the A&SAB began in the minds of timber investors and land developers seeking to access the agricultural resources of the Florida Panhandle and South Alabama.**



The Atlanta and St. Andrews Bay Railroad (A&SAB), also known as "The Bay Line" was a Class I railroad which operated in Alabama and Florida.

The company was founded in 1906 and opened its mainline between Dothan, Alabama and Panama City, Florida in 1908.

As with many railroads in the region, the A&SAB began in the minds of timber investors and land developers seeking to access the agricultural resources of the Florida Panhandle and South Alabama. Chief among them was A. B. Steele, who created the railroad to build south out of Dothan towards the Gulf Coast.

The company incorporated in 1906 and opened its 82-mile line between Dothan and Panama City in 1908. Panama City was incorporated the following year at the terminus of the line. Plans were soon made to extend the railroad north to Atlanta, however financial difficulties and pressure from the Central of Georgia railroad put an end to any plans for extension.

World War II brought about a considerable increase in traffic on the A&SAB. Several military bases in the vicinity of Panama City ensured the Bay Line would remain a hotbed of activity for the duration of the war. Shortly after the war in 1947, the A&SAB was granted Class I status.

Over the years the railroad had a number of different owners and was renamed the "Bay Line Railroad" during the 1990s. Today, it is under the direction of Genesee & Wyoming.



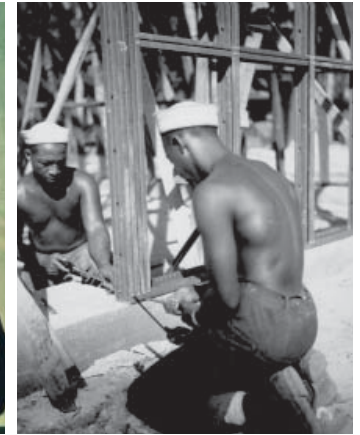
DISCOVER

# AFRICAN AMERICAN CULTURE



THE ROSENWALD SCHOOL





The black community of Panama City, known as Shinetown, had several different names, such as East End because it was the eastern-most section of development in the greater St. Andrews area. The main industry in the small community was a sawmill. The community took its name from a man whose nickname “Shine” probably came from his practice of making and selling rum.

The children of the community attended classes in homes and churches until 1928, when the first official school opened in Shinetown. However, it operated for only four months each year and had only grades one, two, and three. Parents who wanted their children to attend school beyond that had to pay for the extra months. The parents also had to buy all the books, papers, and pencils used at the school.

In 1944, the Shinetown Post Office, which was also known as Rosenwald, opened, but lasted only until 1949, when service was transferred to Panama City. Today the old Shinetown community is known as Glenwood.

Redwood Cemetery, which is in the Old Orchard section of Panama City on Redwood Avenue and 7th Street, began in 1916, when W.J. Lee sold over two acres of land for the Colored Peoples’ Cemetery of Millville. This cemetery across the street from the Potter Temple Holiness Church has many African Americans buried there, including one of the most famous of them for this area, Narcisco “Hawk” Massalina.

One other cemetery for African Americans was the Black Cemetery, which is north of Oakland Cemetery and near the SW corner of Balboa Avenue and 15th Street in Panama City. Over one hundred blacks were interred in that cemetery, which later included convicts who died at the six-acre convict camp that the state built in 1934 just south of the cemetery. Some city maps still indicate the location of the Black Cemetery in its original place.

Panama City was the home of Rosenwald Junior College, which began in 1958 as one of twelve black junior colleges in Florida. Its first president was Calvin Washington, who was also principal of nearby Rosenwald High School. Its first year enrollment of 35 total students, including those in the vocational program, was so much lower than the 125 expected that the junior college had to meet in a wing of the black school, but little by little it added students until it had 177 students in the 1964-65 school year, before merging with Gulf Coast Junior (later Community) College in 1966. Mr. Washington was given a job in the school board office.

In 1994, almost three decades after the black junior college merged with the white school, officials at Gulf Coast Community (later State) College dedicated the Rosenwald Junior College on its main campus.

**Florida’s black community has a rich history that is approaching its 500th anniversary during this century. Black people have contributed to Florida’s social, economic, and political development.**



### Massalina Bayou

African American Spanish fisherman Josea Massalina, a free black Spanish merchant marine was founder of Red Fish Point, a small community on what is now Tyndall Air Force Base. He jumped ship at St. Joseph in 1836 and made his way to Red Fish Point to homestead. Massalina went to Georgia and bought a slave wife and invited about 40 Black families to join him. The community moved across the bay, settling along the Bayou now named for the Massalina family. They constructed a school and church as well as individual homes. Massalina’s son, Hawk, was a prominent Panama City ship builder and fisherman. Many original homes remain in this once-African American neighborhood.

### The Rosenwald School

624 Bay Street

A Rosenwald School was the name informally applied to over five thousand schools, shops, and teachers’ homes in the United States which were built primarily for the education of African-American children in the South in the early 20th century.

Located in what was once the black business district of Panama City, the Rosenwald School served black students in Bay County during segregation. The original building remains on its original site.





In 2011, the college was renamed Gulf Coast State College (GCSC) as it changed a number of its 2-year degrees to 4-year accredited degrees. The school had previously been named Gulf Coast Community College as well as Gulf Coast Junior College.

Serving the community since 1957, GCSC was the first public two-year institution to open after the 1957 Florida Legislature established a statewide network of community colleges. Located in Panama City on Florida's Emerald Coast, Gulf Coast is one of 28 public colleges in the state, all located within commuting distance of 96 percent of the population.

From 1957 through 1960, the College operated in temporary facilities at the Wainwright Shipyard (located across the street). The City of Panama City provided 40 acres for the permanent campus overlooking St. Andrew Bay; the College purchased the remaining 40 acres. Construction of new buildings on the campus began in 1959, with the actual move to the new campus completed the next year.

For its first nine years, the College served primarily the residents of Bay County. In the summer of 1966, Gulf County became part of the College's service district, and Franklin County was added in 1984. GCSC has an enrollment of more than 22,000 credit, noncredit, workforce, and continuing education students.

**Serving the community since 1957, GCSC was the first public two-year institution to open after the 1957 Florida Legislature established a statewide network of community colleges.**



LEARN

# GULF COAST COMMUNITY COLLEGE







WHITFIELD  
HOSPITAL



HEAL

# WHITFIELD HOSPITAL



The connections between hospitals in Bay County began weaving together in 1924 with the opening of Adams Hospital by Dr. D.M. Adams and associates. One of those associates, Dr. J.M. Whitfield, eventually left and formed the Whitfield Hospital in 1930.

Dr. A.H. Lisenby joined him, and the hospital changed to the Whitfield-Lisenby Hospital, later becoming Lisenby Hospital in 1937. The first Bay County Health Department opened two years later after the Florida State Board of Health appointed Dr. A.H. Ball to the post of county health officer.

In the early 1970s, there were three hospitals in Panama City: 100-bed Bay Memorial Hospital; 40-bed Lisenby Hospital; and 30-bed Adams Hospital. All three facilities were aging; there was a lack of specialized care; and none of the hospitals had emergency departments. Concerned about the quality of care their patients were receiving, two local doctors, Dr. Tim Smith and Dr. James Poyner, took a bold risk. They decided to buy Lisenby Hospital in 1969 and turn it into a high-quality medical center.

Lisenby hospital continued to expand from 40-beds to 100-beds to ultimately 150-beds, but there was a catch. The state granted a certificate of need for a 150-bed hospital, under the condition that Lisenby close because it was outdated.

The closing of Lisenby Hospital not only marked the end of an era it also marked the dawn of a new era in healthcare in Bay County. Gulf Coast Regional Medical Center was born.









CHAPTER 2

# ***HERE AND NOW***



*THE*

36

*Existing ASSETS to Leverage in Panama City*





MCKENZIE  
PARK

*Existing **ASSETS** to leverage in Panama **CITY***

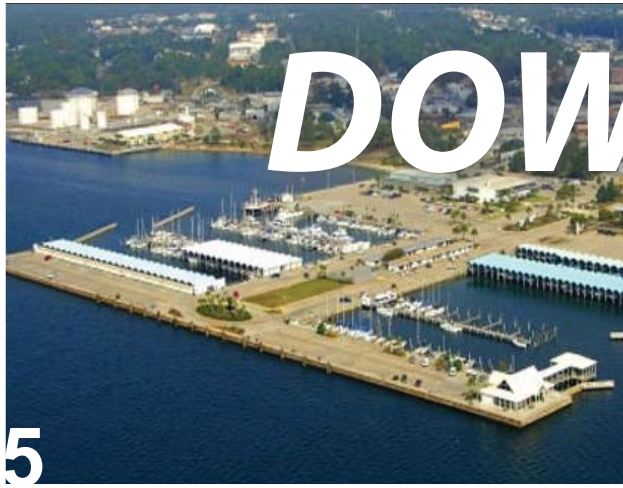
***DOWNTOWN***





**KEY:**

- 1. Historic Hotel
- 2. Maritime Institute
- 3. Multifamily Tower
- 4. Waterfront Hotel
- 5. Downtown Marina
- 6. Martin Theater
- 7. Visual Arts Center
- 8. Harrison Avenue Retail/  
Dining/ Entertainment
- 9. Mckenzie Park



# DOWNTOWN

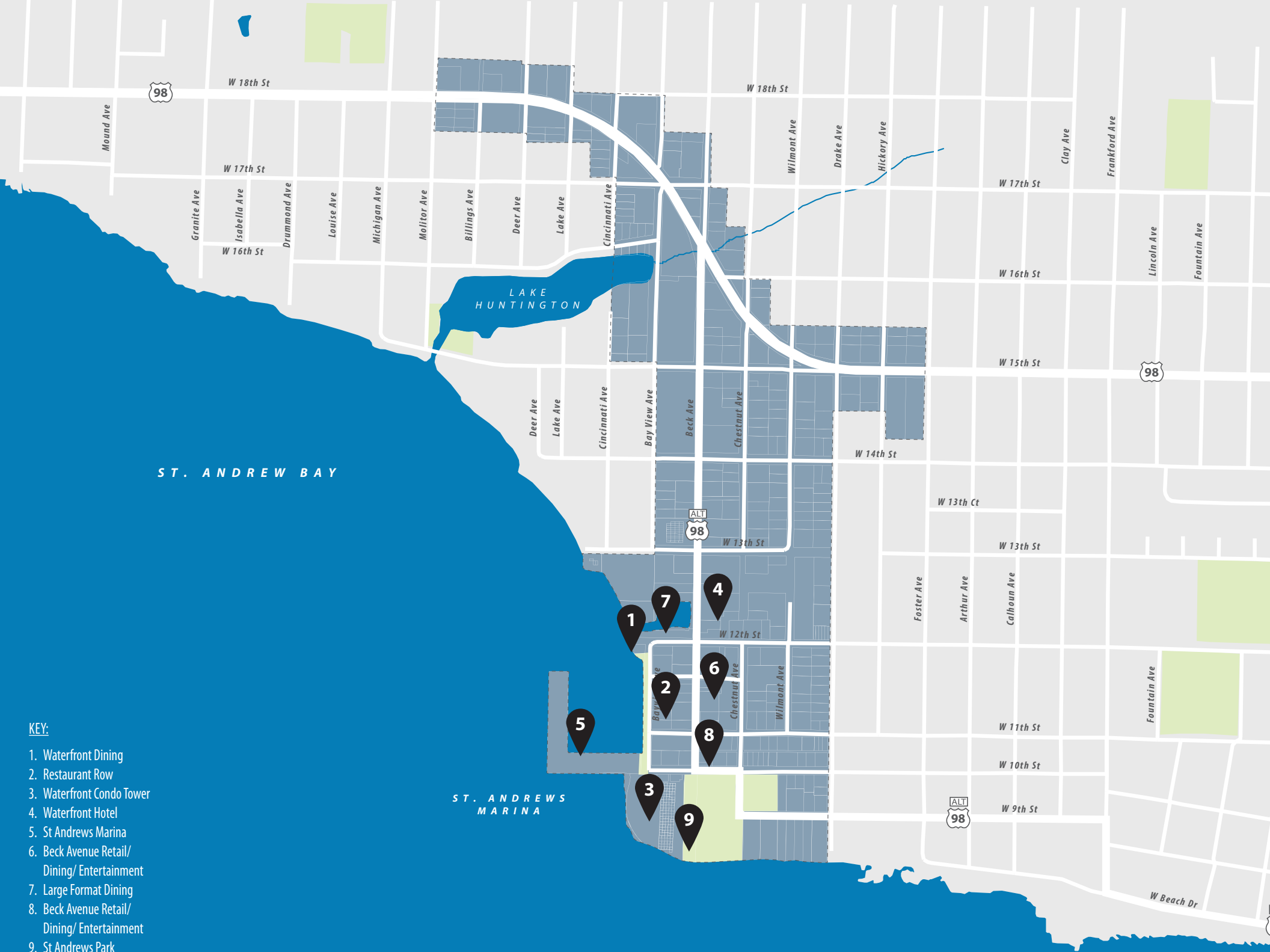




*Existing **ASSETS** to leverage in Panama **CITY***

*ST. ANDREWS*





ST. ANDREW BAY

ST. ANDREWS MARINA

KEY:

- 1. Waterfront Dining
- 2. Restaurant Row
- 3. Waterfront Condo Tower
- 4. Waterfront Hotel
- 5. St Andrews Marina
- 6. Beck Avenue Retail/ Dining/ Entertainment
- 7. Large Format Dining
- 8. Beck Avenue Retail/ Dining/ Entertainment
- 9. St Andrews Park



1



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3



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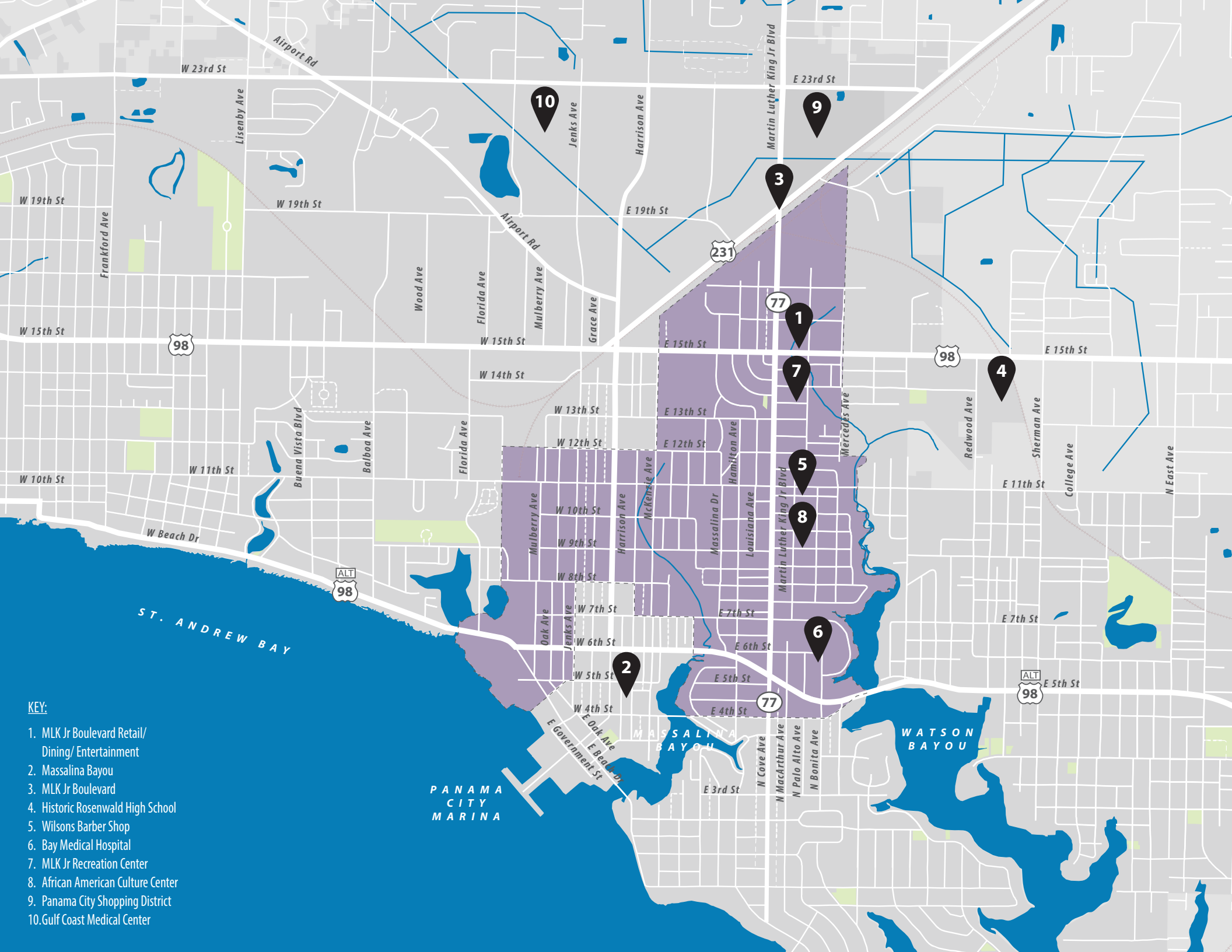




*Existing **ASSETS** to leverage in Panama **CITY***

***DOWNTOWN  
NORTH***





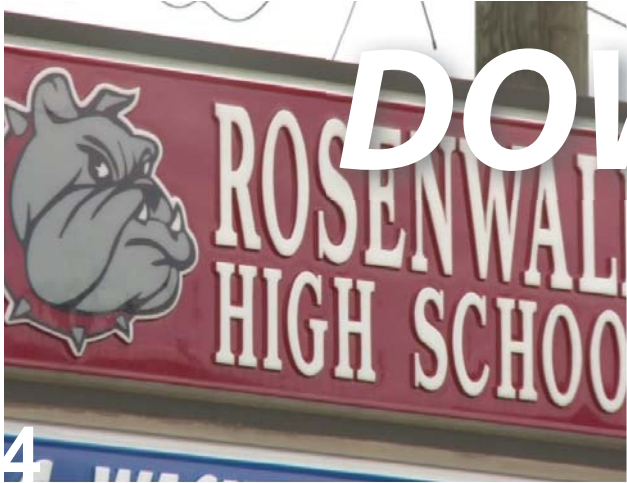
**KEY:**

- 1. MLK Jr Boulevard Retail/  
Dining/ Entertainment
- 2. Massalina Bayou
- 3. MLK Jr Boulevard
- 4. Historic Rosenwald High School
- 5. Wilsons Barber Shop
- 6. Bay Medical Hospital
- 7. MLK Jr Recreation Center
- 8. African American Culture Center
- 9. Panama City Shopping District
- 10. Gulf Coast Medical Center

PANAMA  
CITY  
MARINA

MASSALINA  
BAYOU

WATSON  
BAYOU



# DOWNTOWN NORTH

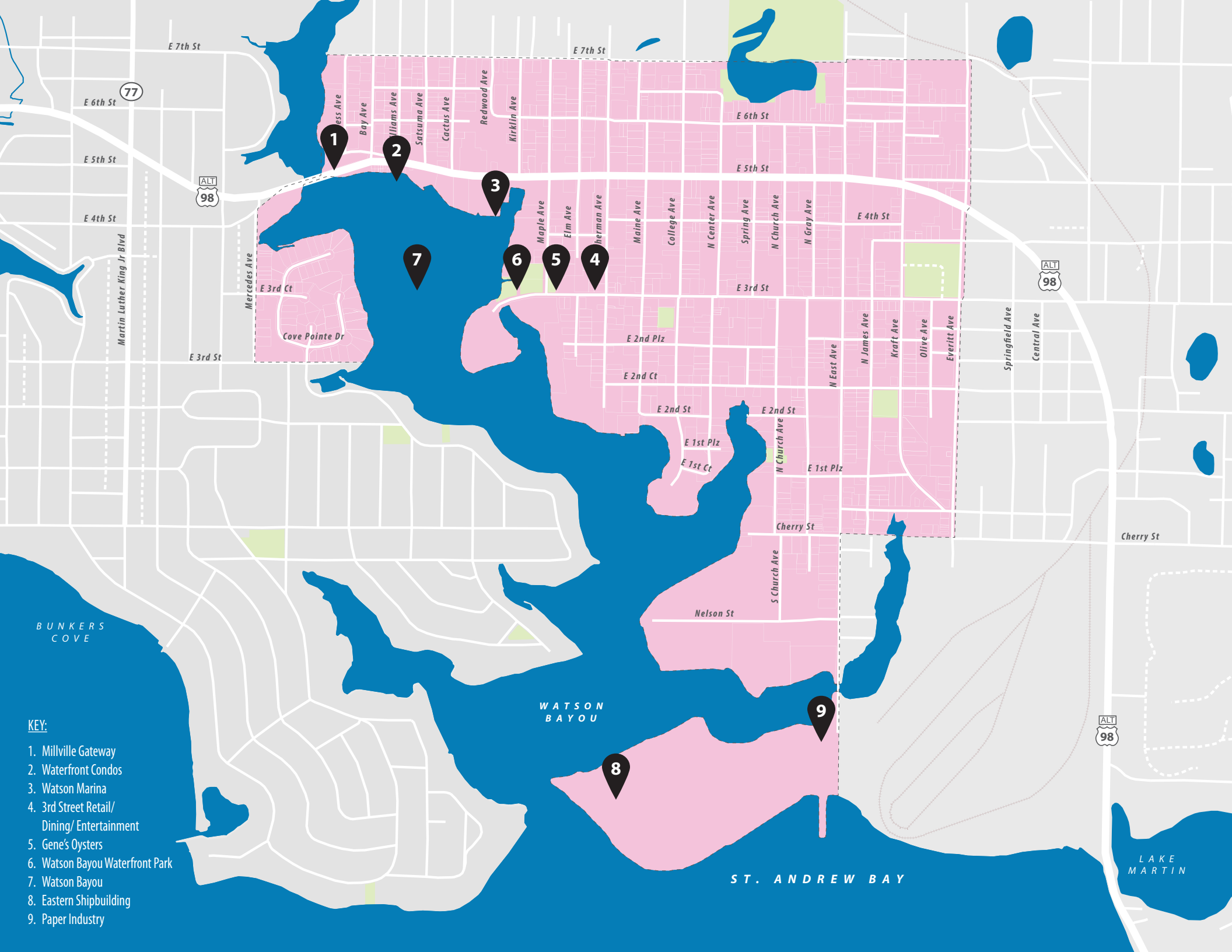




*Existing **ASSETS** to leverage in Panama **CITY***

***MILLVILLE***





**KEY:**

- 1. Millville Gateway
- 2. Waterfront Condos
- 3. Watson Marina
- 4. 3rd Street Retail/  
Dining/ Entertainment
- 5. Gene's Oysters
- 6. Watson Bayou Waterfront Park
- 7. Watson Bayou
- 8. Eastern Shipbuilding
- 9. Paper Industry









## CHAPTER 3

# *MOVING FORWARD*







Source: [www.pcgov.org](http://www.pcgov.org); Doug Dobos (photo)



# IMPLEMENTATION



## DESTINATION BRANDING AND LOGO DESIGN

- Develop a Genuine Brand for Destination Panama City using DMAI's preferred method of destination branding "BrandScience"
- Develop a BrandPromise or a unique positioning statement for Destination Panama City to act as a filter in determining the appropriate action, image and message for the brand
- A distinctive destination brand provides competitive advantage through differentiation, improves or revitalizes a destination's image, and increases opportunities for strategic alliances and partnerships

## DESTINATION MARKETING PLAN

- Develop goals, strategies and tactics to maximize the rollout and impact of the destination's brand over the first three years
- Strategically focus the destination's marketing and messaging in advertising outlets that reach the desired target audiences
- Utilize direct-response marketing campaigns to capture visitor leads and establish a database of visitor information for future outreach
- Incorporate measurable strategies to determine marketing ROI

## PUBLIC RELATIONS

Creating awareness and excitement for Panama City through an aggressive, proactive campaign could be jump-started immediately. A segmented plan can hit the right audiences with the right messages at the right time. This includes couples, arts & culture seekers, sailing/boating enthusiasts, culinary aficionados and millennials seeking the next "hot" spot. A local, regional and national push is recommended with a robust proactive pitching and visiting journalist program, offering media and social media influencers the opportunity to discover the many attributes of Panama City. Measurement criteria to be outlined and agreed upon in advance to ensure stakeholders understand and trust the communication outreach plan.



## ARTS & CULTURE

### ARTS & CULTURE EXPANSION

Dynamic and diverse, Panama City's cultural assets have the potential to become a destination driver for tourism development and a tool for downtown and neighborhood revitalization. According to a 2013 report from Mandala Research, LLC, 76 percent of all U.S. leisure travelers engage in cultural activities. The size of the market is estimated at 129.6 million adults in the U.S. spending approximately \$177 billion annually. Cultural travelers typically spend more and stay longer than any other types of travelers. The U.S. cultural traveler spends 60 percent more, approximately \$1,319 per trip compared with \$820 for domestic leisure travelers. Cultural travelers also travel more often than the general leisure traveler and are predominately affluent and well-educated. Many are baby boomers who want to engage with locals through "immersive experiences."

However, a July 2014 "State of the American Traveler" report from Destination Analytics, Inc., reveals the growing impact of Millennials on cultural tourism, too. 73 percent of Millennials stated that they want to engage in a destination's arts and cultural assets – the highest rated activity of importance in the survey. Racially diverse and technologically savvy, the Millennial generation (born between 1977-1994) represent the largest cohort since the Baby Boomers. Both of these demographics are highly desirable target audiences for a robust, expanded cultural tourism program in Panama City.



- **Music Matters in Panama City** – Panama City has a thriving music scene that is on the cusp of a major breakthrough. From underground venues hosting some of the region’s acclaimed performers in the “Ghetto Palace” (located in the home of an iconic tour professional), Mosey’s, and a 200-person ukulele orchestra to Tuesday nights when musicians are playing at various eateries throughout the city.
- **Artists Welcoming Artists (or Aspiring Artists)** – Panama City is also home to a collection of talented visual artists. The city offers two dedicated places where visitors can be artists for the day or “on the spot.” Floriopolis in St. Andrews gives travelers the opportunity to spend an hour creating a specific art project.
- **Panama City Arts District** – With an eclectic mix of visual and performing arts venues, including the Panama City Visual Arts Centre, the Martin Theater, the City Arts Co-op, and the Panama City Civic Center, downtown Panama City has a high concentration of cultural facilities that can serve as the anchor of attraction. These authentic assets are beneficial in establishing Panama City’s distinctive “sense of place.” The existing facilities can be expanded to attract residents, businesses, artists and other members of the creative economies to spearhead downtown revitalization and create a critical mass of cultural experiences. Opportunities include expansion of performance spaces, artist studios, artist-in-residence programs, arts-related retail shops, music or media production studios, art education and workshop venues.
- **Inspiring Year-Round Events** – From Creative Con, a multimedia convention focusing on celebrating and exploring (and earning a living from) the arts to Public Eye Soar, featuring animations and films beaming on downtown’s streetscape, Panama City engages visitors through the arts in creative ways. Panama City also celebrates the written word through BooksALIVE!, a storytelling festival that hosts some of the country’s most acclaimed authors.
- **African American Heritage** – Panama City’s African-American heritage is deeply rooted. Prior to the Civil War, a group of free blacks, such as Jose and Narcisco (Hawk) Massalina and their families, settled what is now referred to as Massalina Bay. After the war and during the Great Migration, many others followed suit and migrated south to Panama City. Early on they organized the Negro Improvement League and later the Glenwood Improvement League, both of which brought many favorable changes to the black community, including a USO for black servicemen, a swimming pool for black youth, the pier at St. Andrews State Park, known as Brown’s Beach for black individuals in the 1950’s, baseball and softball fields at Woods Field, a library, a Rosenwald school that is still standing, and much more.







- ***If the Florida Keys and Austin, Texas Got Married...*** – If travelers are seeking a truly authentic experience, St. Andrews is chock full of charm. From a diverse collection of eateries, including the beloved Little Village, and local hipster hangout Amavida Coffee, to charming stores such as the repurposed Centennial Bank Building at the corner of Beck Avenue and the waterfront Oaks by the Bay park, St. Andrews is truly a treasure waiting to be discovered.
- ***Panama City's Progressive Arts Culture*** – Established to remove the economic barrier to the arts and to develop the destination's creative potential, the Global Arts Society provides experienced and non-experienced children, teens and adults of all ages and abilities an opportunity to participate in visual and performing arts.
- ***Media Arts/Digital Arts*** – Defined as artworks that depend on a technological component to function, Panama City has the opportunity to capitalize on this growing global trend with a core group of professional residential digital artists, a growing digital art festival "Public Eye Soar" and a degreed curriculum at Gulf Coast State College. A relatively new art form, media/digital arts are exploding in Europe and Asia with a handful of cities recognized under the media arts designation of the UNESCO Creative Cities Network. This transformative art form has the potential to rapidly change the trajectory of a destination into a highly visual cultural experience. The Lumen Prize Exhibition is a global annual showcase of the best in digital arts and demonstrates the vast diversity of this expanding art form (<http://lumenprize.com/>).



## SAILING / BOATING ENTHUSIASTS

- ***The Wind Beneath your Sails*** – Panama City is a world-class sailing destination, offering wind conditions that many coastal communities envy. Kids begin testing the waters as early as five years of age with many going on to compete in World Championships and even the Olympics. Travelers also have the opportunity to sail in the deepest and largest protected bay in the area, located on boating's famous "Great Loop" with easy access to the Gulf. They also have the opportunity to attend regattas such as the A-Class Catamaran North American Championships.  
Note: A local Olympian may be sailing in the 2016 Olympics in Rio de Janeiro
- ***Extreme Breezes for Adventurous Athletes*** – The same wind conditions that attract sailors to Panama City also attract water sports tricksters who excel in "backloops" and "downloops." Visitors can enjoy flatwater on the Bay and wavesailing in the Gulf.
- ***Explore Panama City's Barrier Islands by Boat*** – Boasting more marinas per capita than many destinations, Panama City is a boater's paradise. Those who are making the great loop are invited to enjoy our undeveloped barrier islands and unwind in Panama City for a night or two...or three.



## CULINARY AFICIONADOS

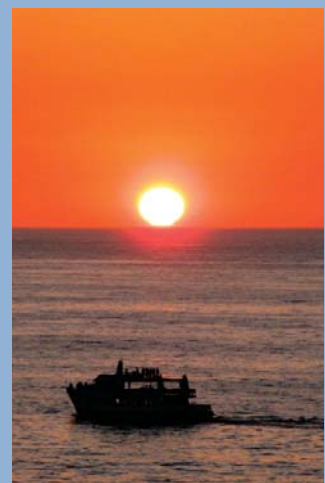
- ***Gene's Oyster Bar*** – Located in the Millville community, one of the original frontier settlements of Bay County that continues to be a true working waterfront due to an established shipbuilding and marine repair industry, Gene's has been operating since 1930. This is where locals "in the know" go for the largest, freshest oysters straight from the Gulf.
- ***Mosey's is so much More*** – Travelers are encouraged to mosey to Mosey's for terrific pizza and libations, including an incredible beer selection. Nightly live music also draws Panama City movers and shakers to this downtown hangout.
- ***G. Foleys*** – For a fine dining experience without the fuss, G. Foleys is not to be missed. Featuring local produce, Angus steaks and the freshest fish selection from the Gulf of Mexico, G. Foleys is ideal for a night out.
- ***Dan-D Doughnuts*** – The most popular woman in town during the breakfast hour is Ms. Peggy, owner and operator of this Panama City landmark. Traditional and avant-garde flavors and designs are featured, including a donut the size of your head!
- ***Just the Cook*** - Just The Cook is a laid back fast casual restaurant that elevates food in St. Andrews. Serving everything from seafood to gourmet burgers, the owner, Ernie, was handpicked by the Food Network as one of the Top 16 Cooks in America and was featured on the Cooking Channel's new show Trending Bites!

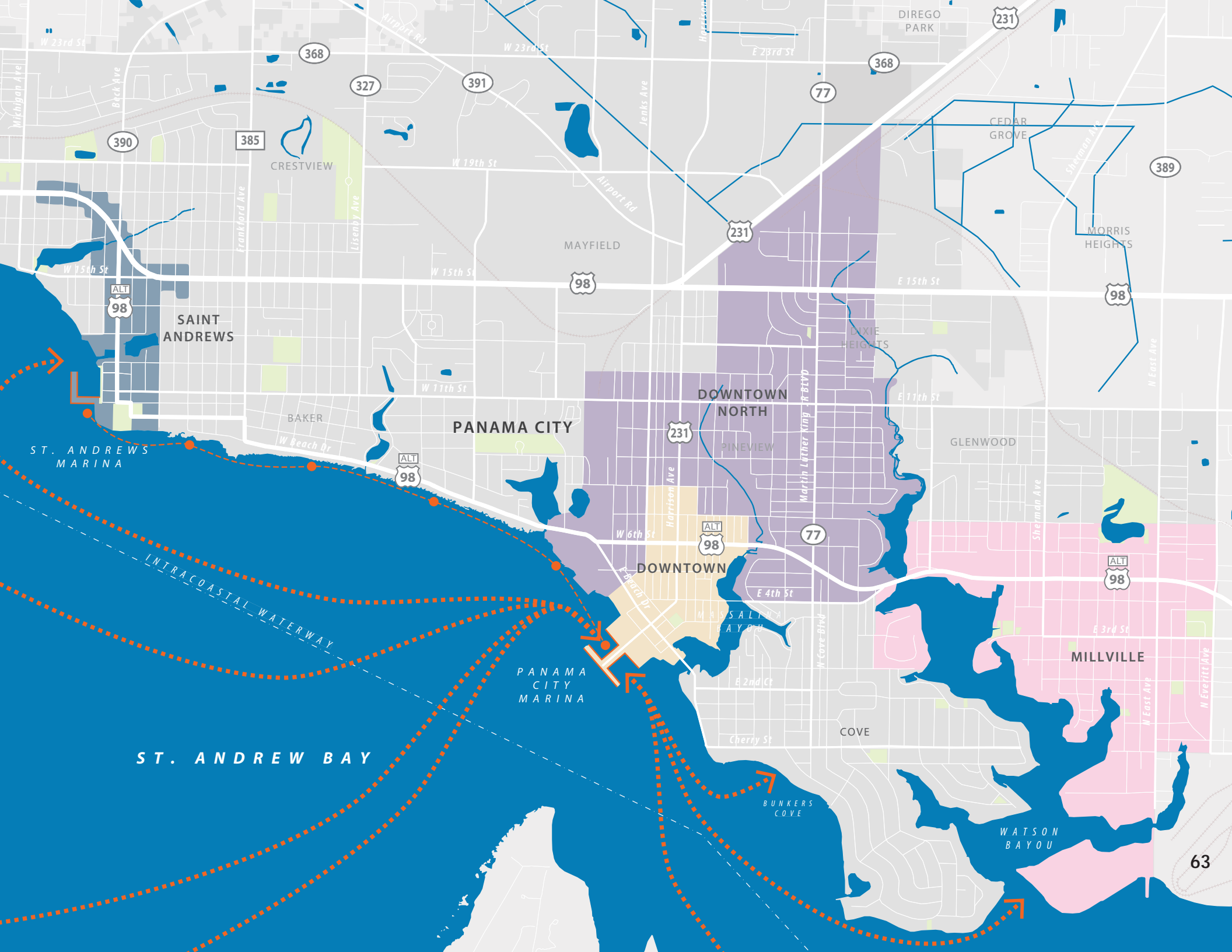




# RECONNECTING COMMUNITIES BY WATER

With location being everything, Panama City's strategic location on St. Andrews Bay provides an ideal catalyst for reconnecting the destination's diverse communities to offer travelers diverse experiences. Water has played an important role in Panama City's shipbuilding and fishing tradition and serves as the playground for today's generation of boaters and sailors. Today, Panama City has the opportunity to leverage this important asset by connecting its burgeoning downtown community with the eclectic St. Andrews through transportation on water taxis. After all, part of the fun can be about getting from point A to point B.





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Michigan Ave  
Beck Ave

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385  
Frankford Ave  
Lisenby Ave

W 15th St  
W 11th St  
W Beach Dr

SAINT ANDREWS

ST. ANDREWS MARINA

INTRACOASTAL WATERWAY

ST. ANDREW BAY

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W 19th St  
W 15th St  
W 11th St

CRESTVIEW

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W 19th St  
W 15th St  
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MAYFIELD

BAKER

PANAMA CITY

W 6th St

PANAMA CITY MARINA

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CHERRY ST

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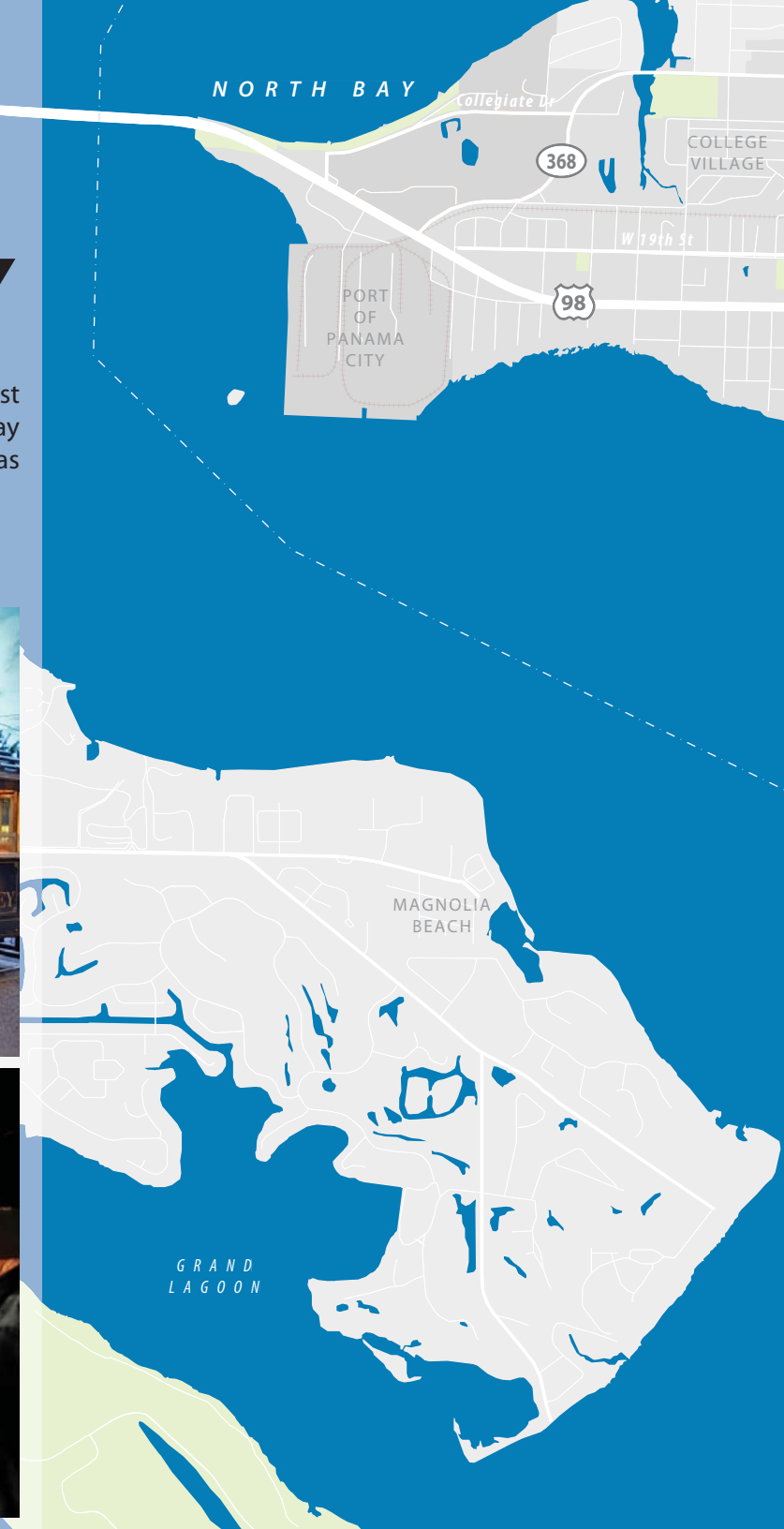
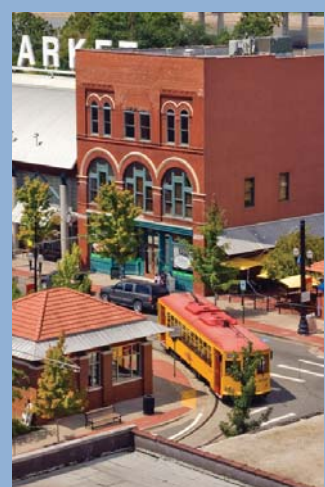
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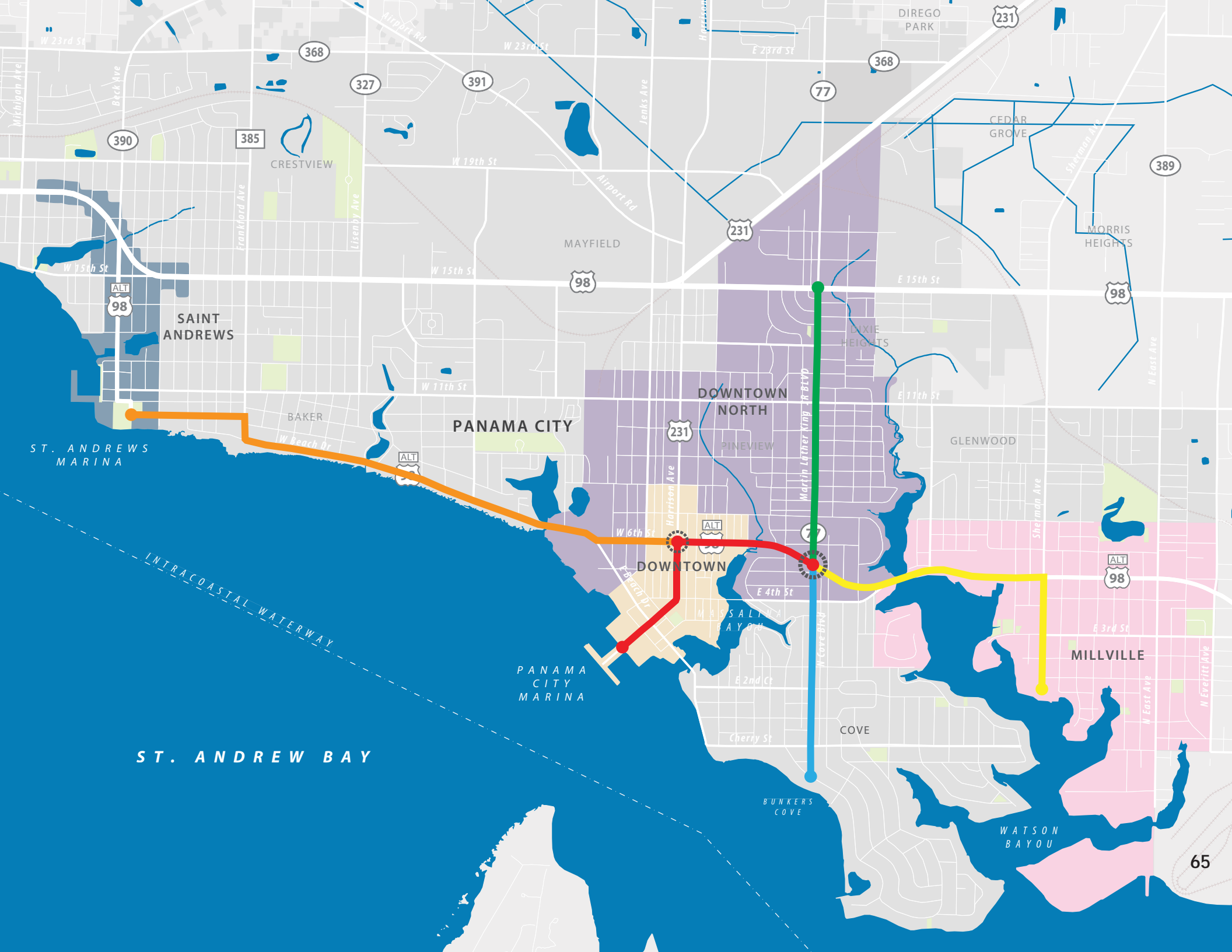
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# RECONNECTING COMMUNITIES *BY TROLLEY*

Affordable public transportation continues to be an important priority for travel destinations. While most visitors currently drive or rent cars when visiting Panama City, a trolley system could serve as an ideal way for guests to see the city in its entirety with ease. The system could begin with a few spokes and expand as riders and tourism infrastructure increase.





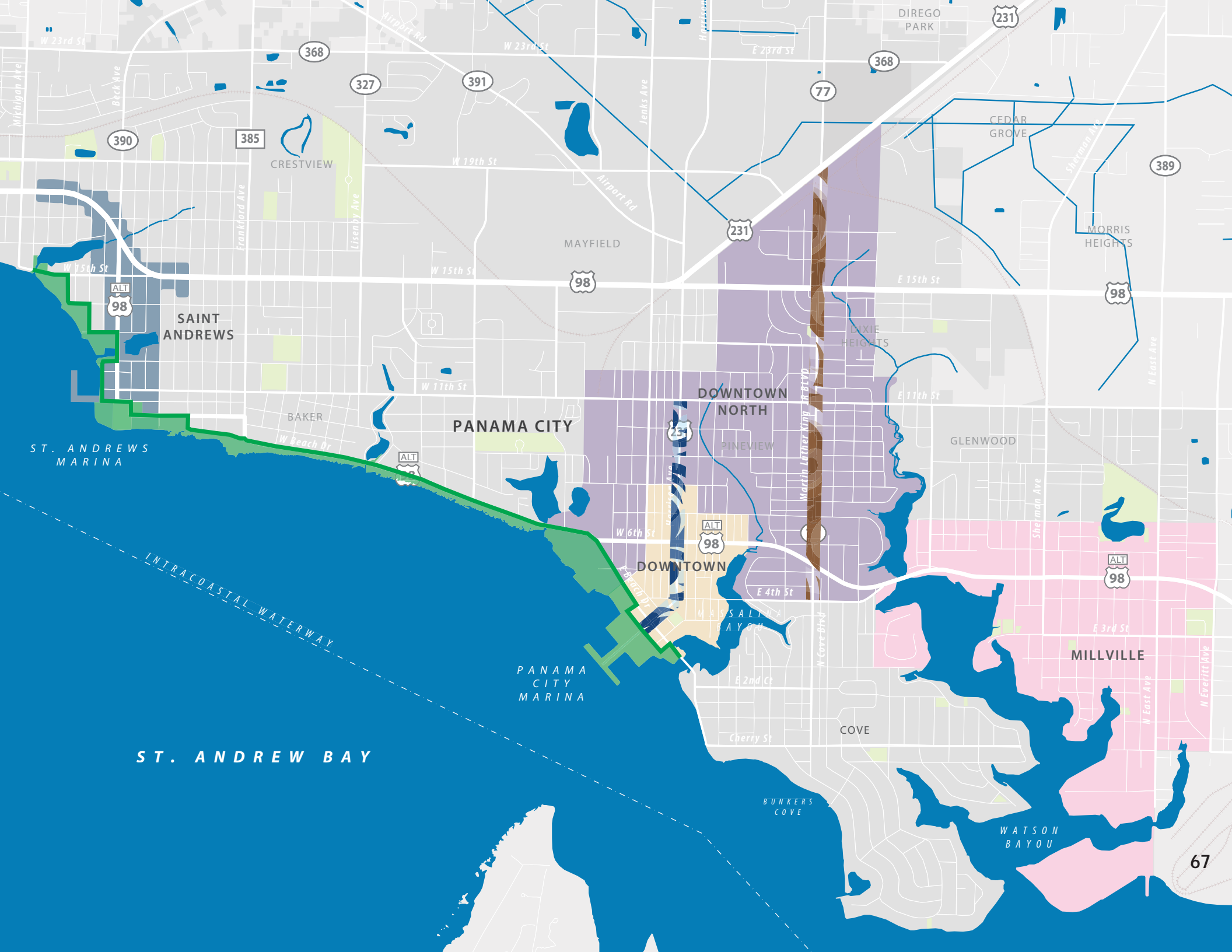
ST. ANDREW BAY



# RECONNECTING COMMUNITIES *BY FOOT*

Beach Drive is arguably one of the most scenic roadways in the state of Florida. To have the opportunity to experience it by foot or bike would allow travelers to savor its beauty even more. The X-mile stretch between downtown Panama City and Oaks by the Bay could be used daily by walkers and joggers as well as for special community walks to benefit charities or serve as an active special event component.





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CRESTVIEW

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CEDAR GROVE

MORRIS HEIGHTS

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SAINT ANDREWS

MAYFIELD

98

DIXIE HEIGHTS

DIREGO PARK

ST. ANDREWS MARINA

BAKER

PANAMA CITY

DOWNTOWN NORTH

PINEVIEW

GLENWOOD

INTRACOASTAL WATERWAY

DOWNTOWN

MILLVILLE

PANAMA CITY MARINA

ST. ANDREW BAY

BUNKERS COVE

WATSON BAYOU

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Beck Ave

Frankford Ave

Lisenby Ave

Airport Rd

Jenks Ave

Sherman Ave

N East Ave

Sherman Ave

N Everett Ave

N East Ave

N Core Blvd

Lincoln Ave

Marie Lather King Dr BYPD

Baker Dr

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*THE*

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The background of the image is a close-up, top-down view of blue water. The water's surface is covered in numerous small, concentric ripples that create a textured, shimmering effect. The colors range from a deep, dark blue to a lighter, almost white-blue at the peaks of the ripples. The overall appearance is that of a calm but slightly disturbed body of water.

*Things You Must Do While in Panama City*





JOHNSON BAYOU

MASSALINA BAYOU

PANAMA CITY MARINA

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ALT 98

ALT 98

231

*Things You Must Do While in Panama City*

# DOWNTOWN

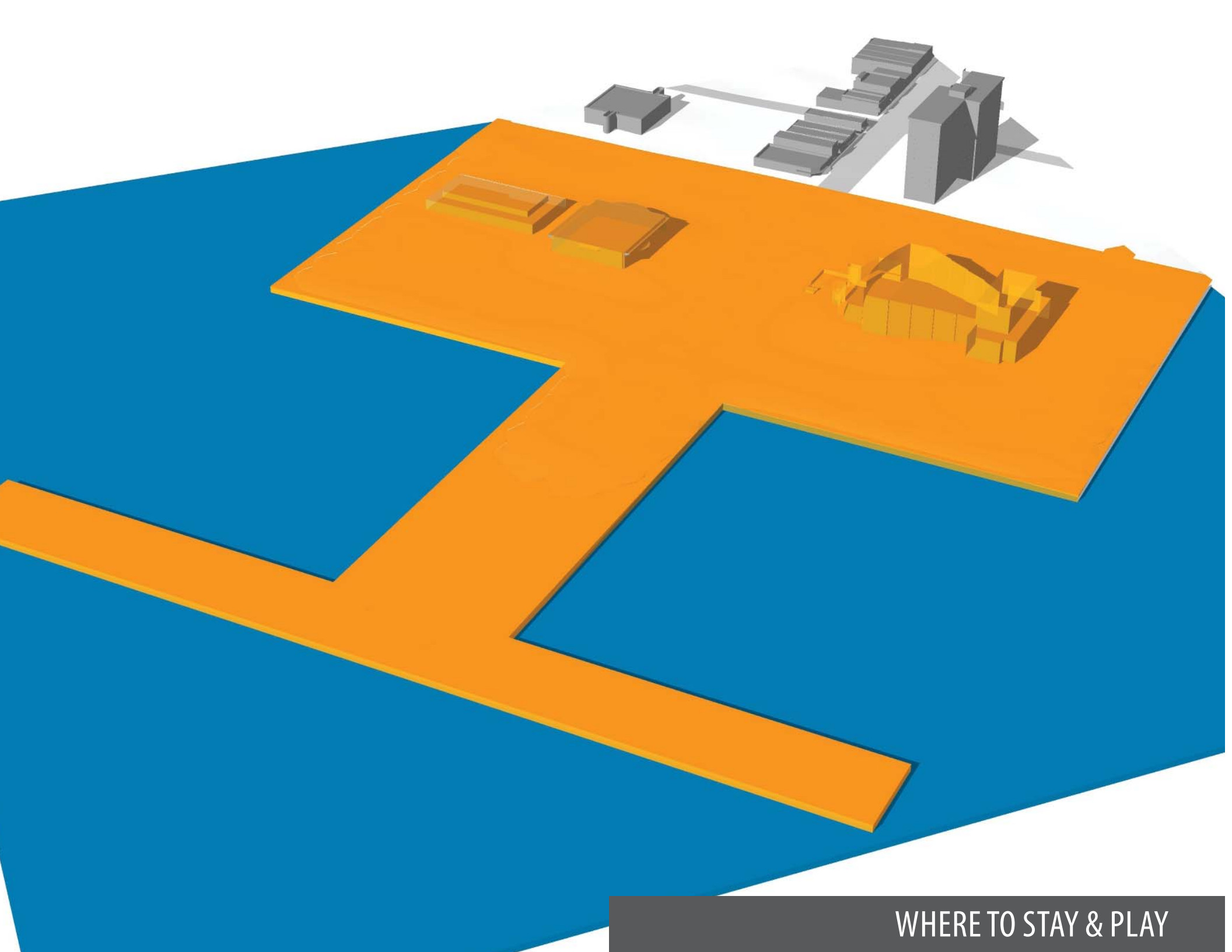
Creating a menu of interdependent elements to position Downtown Panama City as the gathering place for arts, entertainment, education, culinary and innovation. The resulting mix of people serves as support for retail, restaurants and new residences of all types.

## THINGS TO DO

---

- 1 Downtown Marina
- 2 Excursion & US Olympic Sailing Center
- 3 Harrison Avenue
- 4 Music & Entertainment District
- 5 Multi-Family Development
- 6 Boutique Hotel & Restaurant
- 7 Visual Arts Expansion
- 8 Oceanography Institute & Teaching Aquarium
- 9 Culinary Institute & Boats on the Bayou
- 10 Digital Art Projection
- 11 Hotel & Conference Center
- 12 Performing Arts Venue





WHERE TO STAY & PLAY

The redevelopment of the marina is pivotal in the resurgence of Panama City. A new world-class marina could serve as a hub of entertainment, retail, waterfront park, world-class hotel and, of course, water access. Visitors could have the opportunity to bring their yachts or pleasure cruisers to dock at the Panama City marina or book water excursions, participate in boat races or catch a water taxi to dinner in St. Andrews.

Explore synergies with both FSU-Panama City and Gulf Coast State College to develop new academic and residential assets within the Downtown Core. Potential alliances could include Hospitality, Culinary, STEM and Arts programs.

# REDEVELOP DOWNTOWN MARINA



COMMERCIAL RETAIL



PERFORMING ARTS CENTER



MARINA TERMINAL



HOTEL & CONFERENCE CENTER





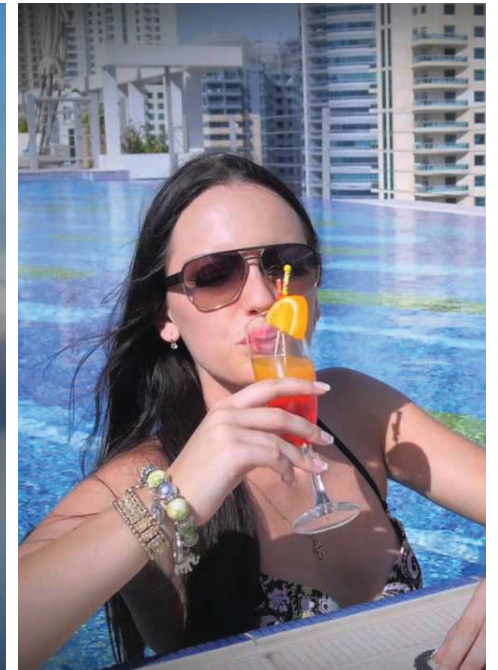
WHERE TO STAY



Hotel and Conference Center – Downtown Panama City has a strong need for an anchor 150+ room downtown hotel to serve as City’s “Gathering Place” including ballroom, conference and meeting space.



# WATERFRONT HOTEL & CONFERENCE CENTER



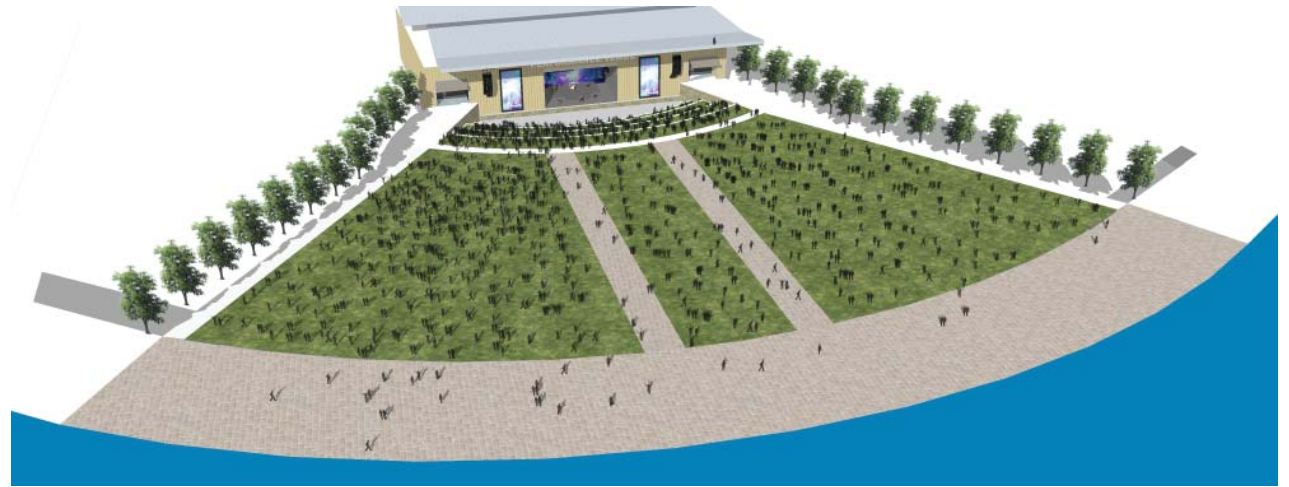




WHERE TO PLAY



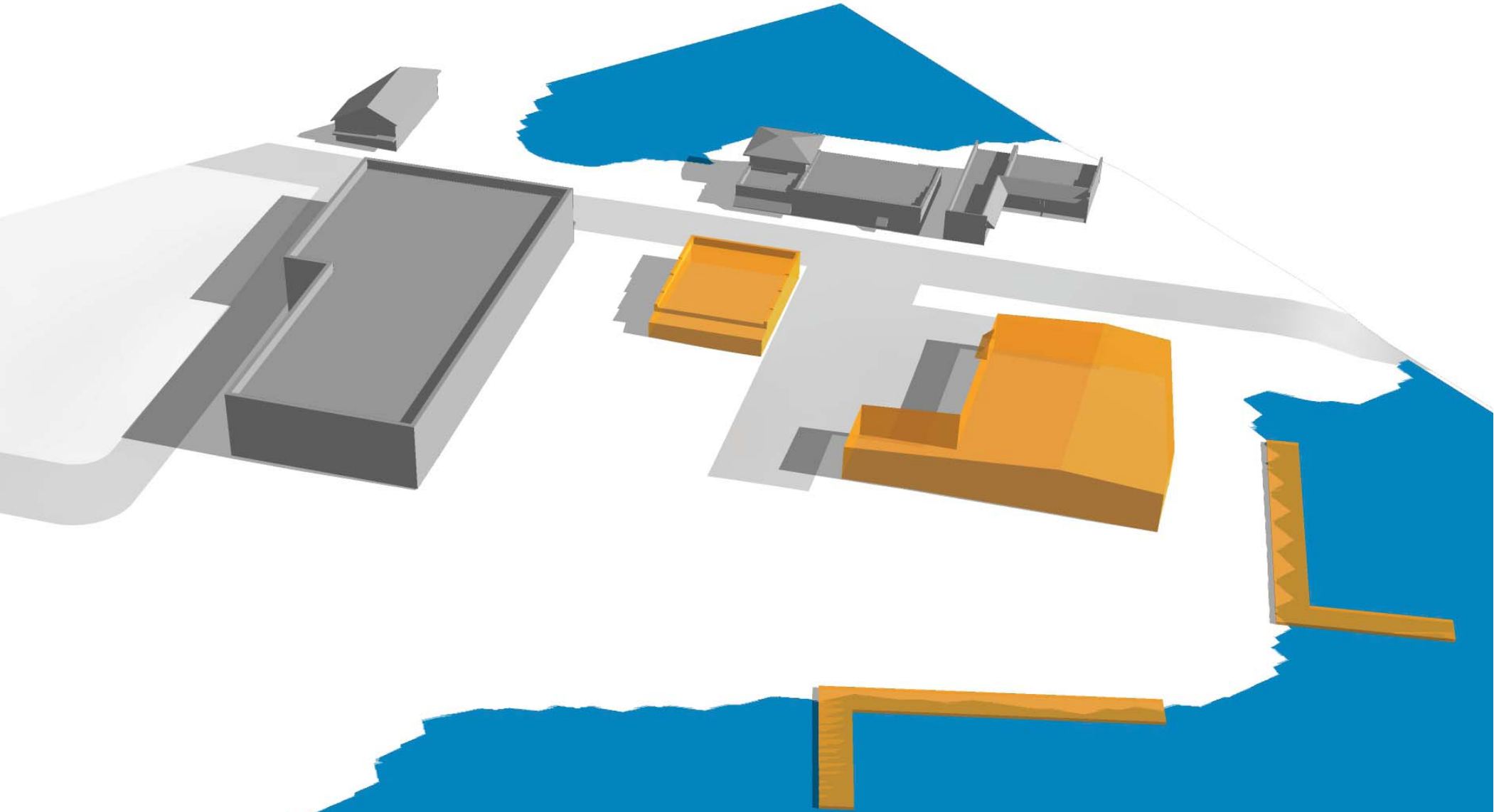
Multi-functional facility with potential multiple stages and seating capacities. Capable of teaching young students and hosting variety of performances including concerts, symphony, Broadway shows, speaker series and other local, regional and national events. Potentially including an amphitheater. Next steps are to conduct a thorough review of existing assets to determine how to maximize this world-class location for a world-class experience.



# INDOOR / OUTDOOR PERFORMING ARTS VENUE







Revered as a sailing community harboring one of the deepest and largest protected bays in the area with ideal winds for the sport, Panama City has the opportunity to become a world-class sailing destination. This is the place where children learn to sail the same time they start kindergarten and parents raise Olympic hopefuls. As host of the 2015 A-Class Catamaran North American Championships, Panama City proved that it could host high-profile events. Currently there is a need for a U.S. Olympic Training Sailing Center. Panama City possesses attributes that the deciding body is seeking in a location.

WHERE TO PLAY

# EXCURSION & US OLYMPIC TRAINING SAILING CENTER





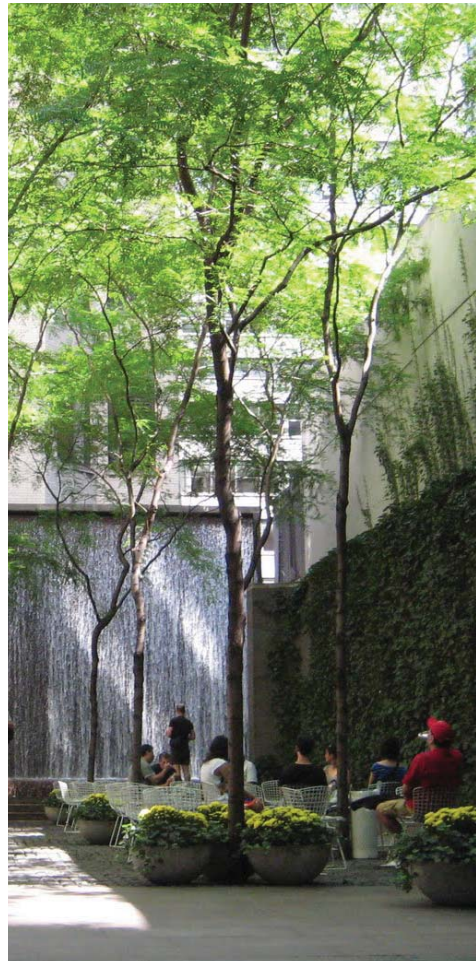
Visitors are attracted to vibrant areas of a community and the 2-block radius between Fourth and Sixth Streets could be energized and enhanced with a few elements. This includes a year-round rotating projection art program that highlights various aspects of the community (i.e. sailing, African American culture, shipbuilding heritage, etc.) as well as the addition of verdant pocket parks and the re-development of dormant storefronts into creative businesses such as galleries and art stores. Perhaps there are retail “pop up” opportunities for the holidays or galleries showcasing local art. Above the stores, artist lofts would provide housing for the area’s talent. A new lighting scene could further enhance the area, enticing guests to stroll into the hours of the night.

Additionally, the Old Marie hotel could be transformed into an urban oasis, complete with a well-designed, yet functional room product and a spacious lobby that encourages gathering throughout the day and evening. Guests and non-hotel guests could meet in the lobby for a cup of coffee, craft brew or flight of wine to plot their next “big idea.”

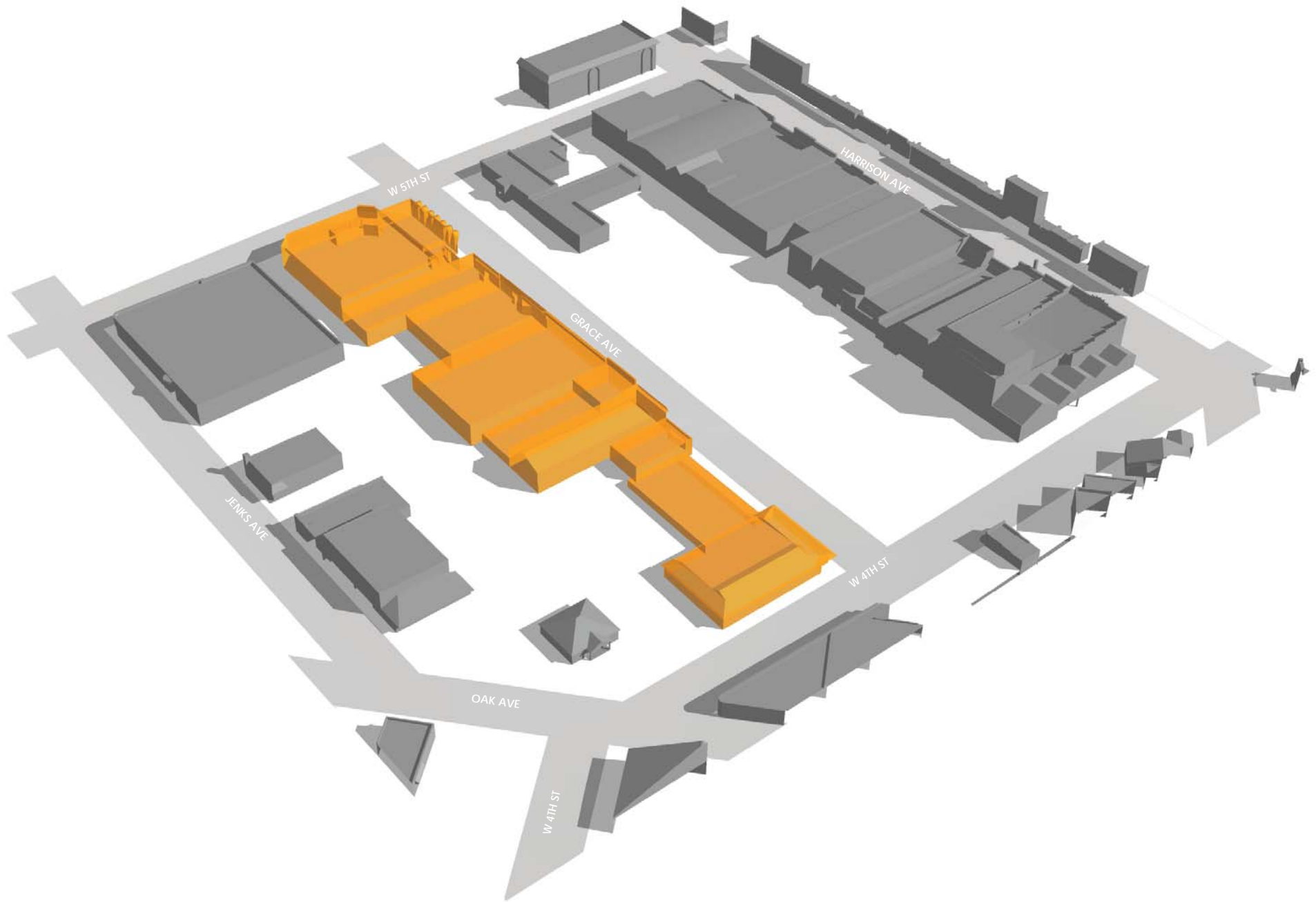
- Pocket Parks
- Unified Lighting
- Redevelop Dormant Storefronts
- Unified Architecture



# ENERGIZE & ENHANCE HARRISON AVENUE







WHERE TO PLAY

Panama City's burgeoning live music scene could flourish with a pedestrian-friendly, dedicated music and entertainment district that showcases area talent and welcomes acts from all over the country. It would be a place where major performing artists play intimate gigs before going on stage at the grand performing arts center. Eventually, specific venues become catalysts for smaller acts to gain exposure in the Southeast. Annual events would be hosted in conjunction with holidays and dedicated music festivals would draw travelers from target markets. Craft breweries and distinctive bar concepts are peppered throughout the district to serve guests.



# PANAMA CITY DISTRICT MUSIC & ENTERTAINMENT





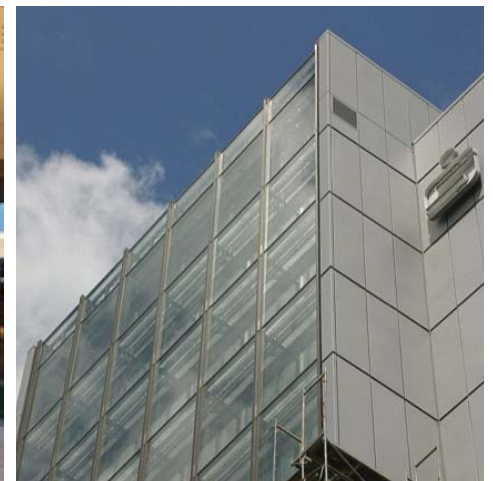


WHERE TO LIVE

The multi-family development will include retail and amenities lining the street and concealing structured parking within the block. Rising up from this active streetscape will be for-rent apartments with access to pool decks and balconies overlooking the marina, St. Andrew Bay, and a reinvigorated, revitalized downtown.



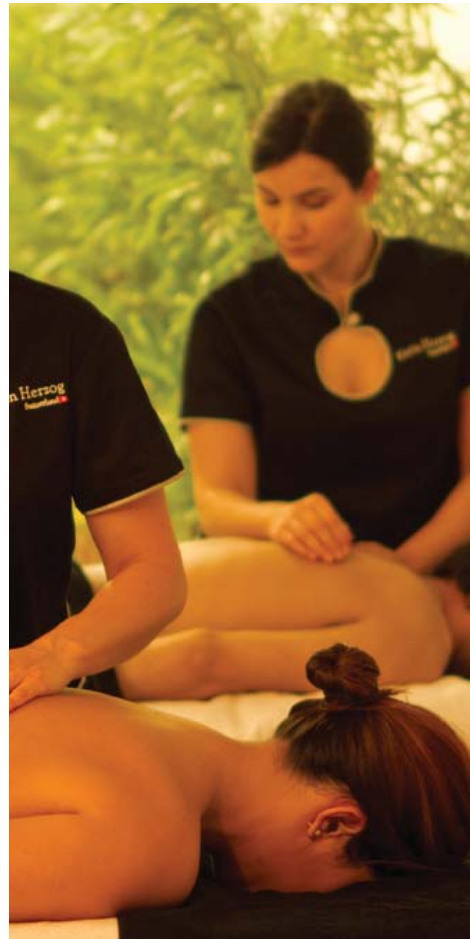
# DEVELOPMENT MULTI-FAMILY HOUSING





For the past 20 years, boutique hotels (properties with 100 rooms or less) have dramatically risen in popularity. Indicators point to a positive trend in this type of hotel development as travelers continue to seek authentic, personalized experiences. According to Travel Weekly magazine, boutique hotels appeal to “creative types who are willing to pay a premium for interesting design, a trendy approach to food, a more casual approach to service and generally hipper feeling than traditional lodging.”

In smaller markets like Panama City, developers are looking to tread carefully on the trendiness of a property and more on the timeless fusion of old and new. Instead of being “exclusive,” the focus is “inclusive.” Today, boutique hotels are operated independently or as part of a corporate group. Ideally, this boutique hotel would celebrate arts and culture, furthering Panama City’s brand.

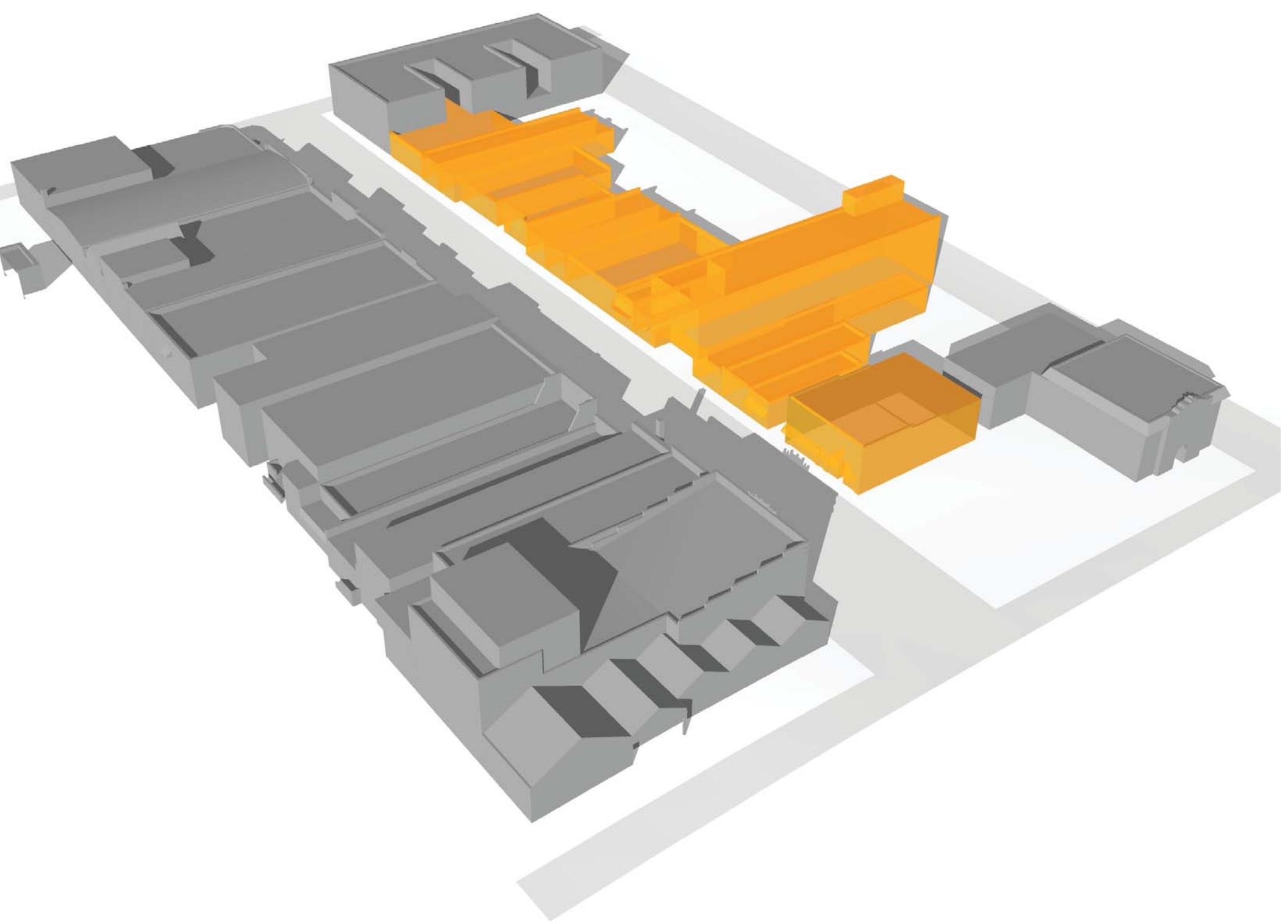


WHERE TO RECHARGE

# DEVELOPMENT BOUTIQUE HOTEL & SPA







WHERE TO DISCOVER

Establishing a live/work scenario for Panama City's collection of visual artists that attracts visitors to the destination while establishing a year-round downtown population would add to the vitality of the downtown district in a compelling way. Storefronts, once dormant, could be transformed into exhibition-style studios and galleries that serve a dual purpose of housing above. There also might be opportunities to redevelop an existing structure into a dedicated artist factory and introduce an Artist Relocation or Artist in Residence Program.



# EXPANSION OF VISUAL ARTS ASSET







WHERE TO LEARN

In conjunction with FSU's various Ocean Science programs, a state-of-the-art oceanographic institute and teaching aquarium could serve as a venue for research as well as attract visitors. The facility could also serve students participating in the Advanced Science Diving Program as an underwater classroom and lab that could engage future generations who might have an interest in oceanographic studies and careers.



# EDUCATIONAL AQUARIUM & OCEANOGRAPHY INSTITUTE







INNOVATION CENTER

WHERE TO LEARN

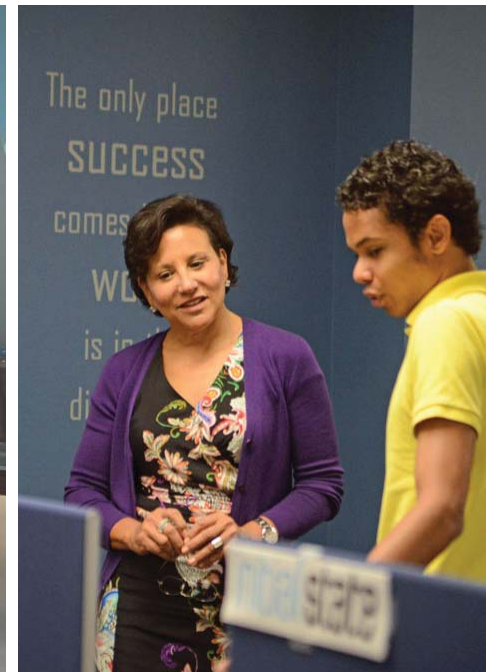


Collaborative programs (potentially with educational institutions) to develop young and innovative new business in Downtown Panama City. The Center will attract new millennials to Panama City and serve as a magnet for local millennials to stay in Panama City after graduation.

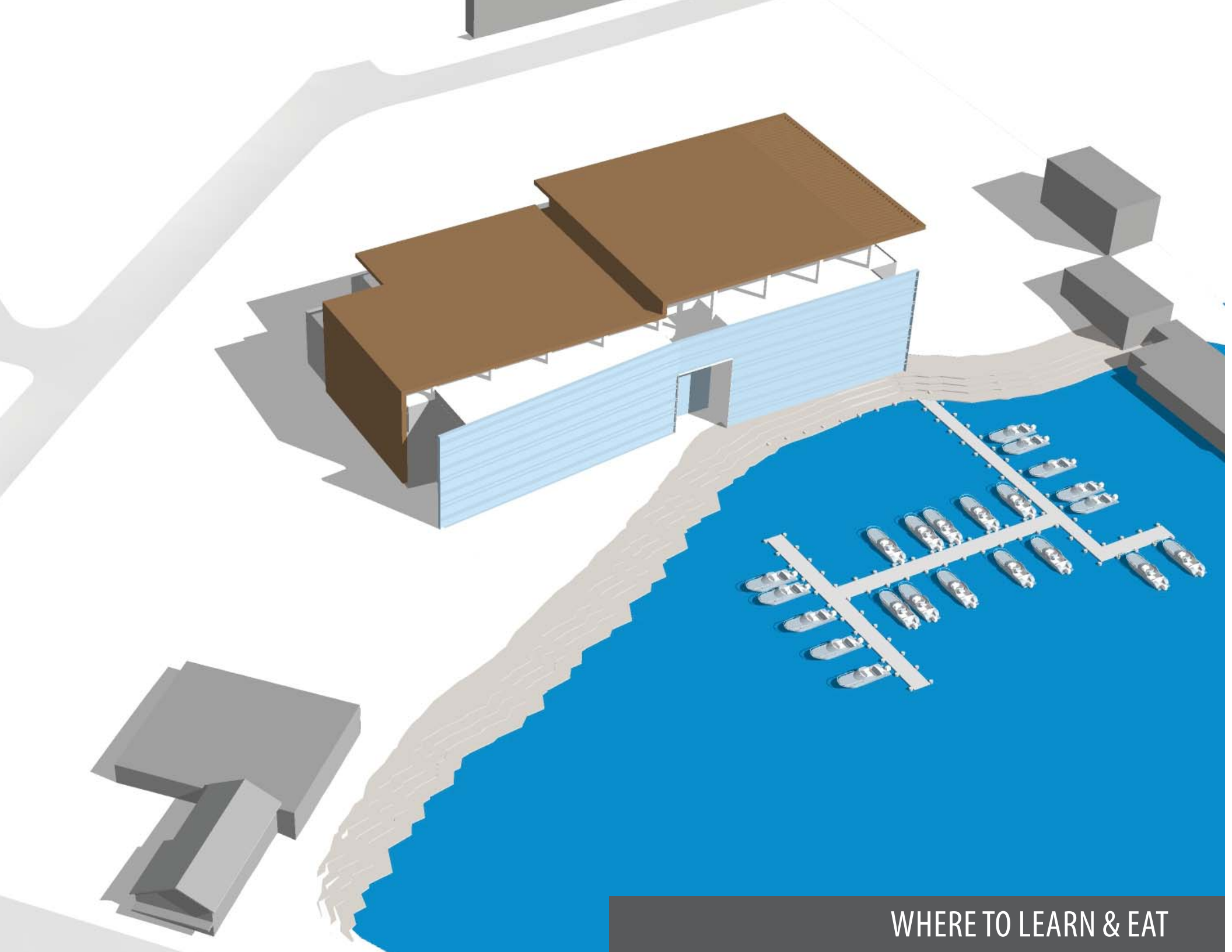
In conjunction with FSU's various Ocean Science programs, a state-of-the-art oceanographic institute and teaching aquarium could serve as a venue for research as well as attract visitors. The facility could also serve students participating in the Advanced Science Diving Program as an underwater classroom and lab that could engage future generations who might have an interest in oceanographic studies and careers.



# ENTREPRENEURIAL & INNOVATION CENTER





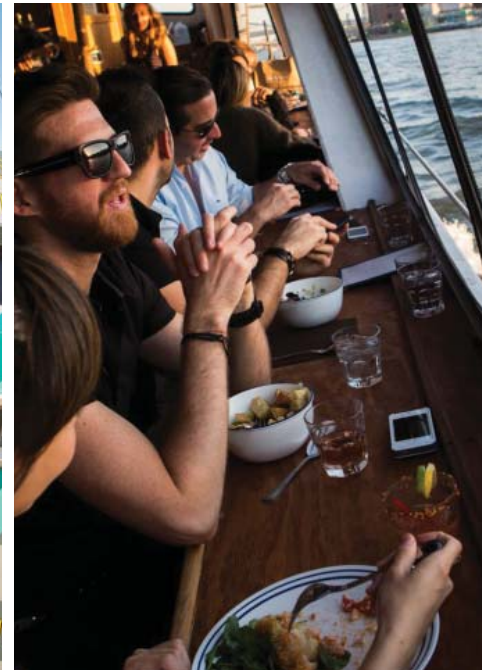


WHERE TO LEARN & EAT

As Northwest Florida's population continues to grow due to economic opportunities or travelers seeing a permanent authentic Gulf Coast lifestyle, the need for quality restaurants operated by skilled professionals will continue to rise. Panama City has the opportunity to expand the programs at Gulf Coast State University and/or FSU Panama City in the launch of a world-class culinary arts program that offers hands-on learning opportunities and, more importantly jobs, after graduation. If partnered with a global organization such as Laureate International Universities which has affiliations with top rated hospitality and culinary schools in the world, the program could claim leadership status in the Southeast U.S.

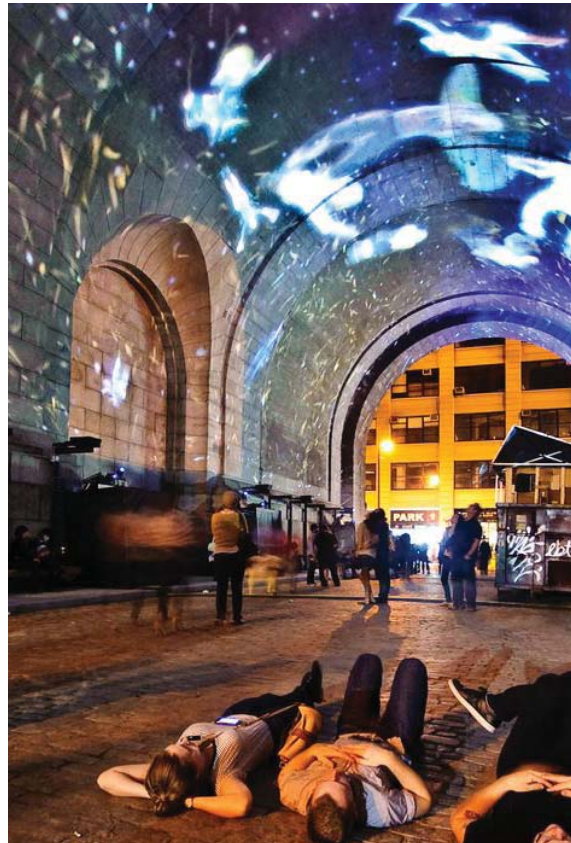


# BOATS ON THE BAYOU & CULINARY INSTITUTE





Tapping into Panama City's professional digital arts talent, less-than-desirable views could be transformed into compelling experiences for visitors and residents alike. They could also serve as content for viral marketing opportunities.



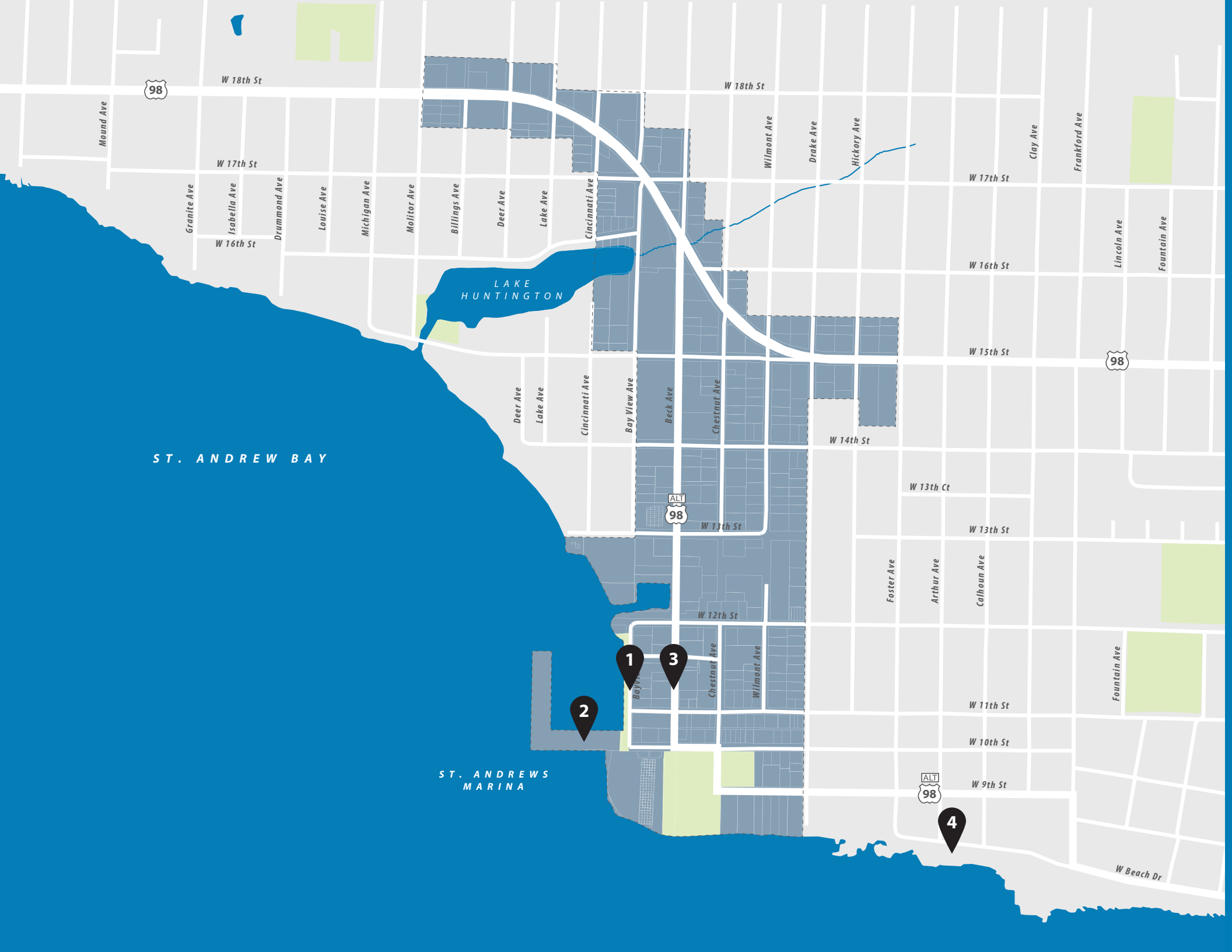
WHERE TO PLAY



# PROJECTION DIGITAL ART







98

W 18th St

W 18th St

W 17th St

W 17th St

W 16th St

W 16th St

W 15th St

98

W 14th St

W 13th Ct

ALT 98

W 13th St

W 13th St

W 12th St

W 11th St

W 10th St

W 9th St

ALT 98

4

W Beach Dr

ST. ANDREW BAY

ST. ANDREWS MARINA

LAKE HUNTINGTON

2

1

3

*Things You Must Do While in Panama City*

# ST. ANDREWS

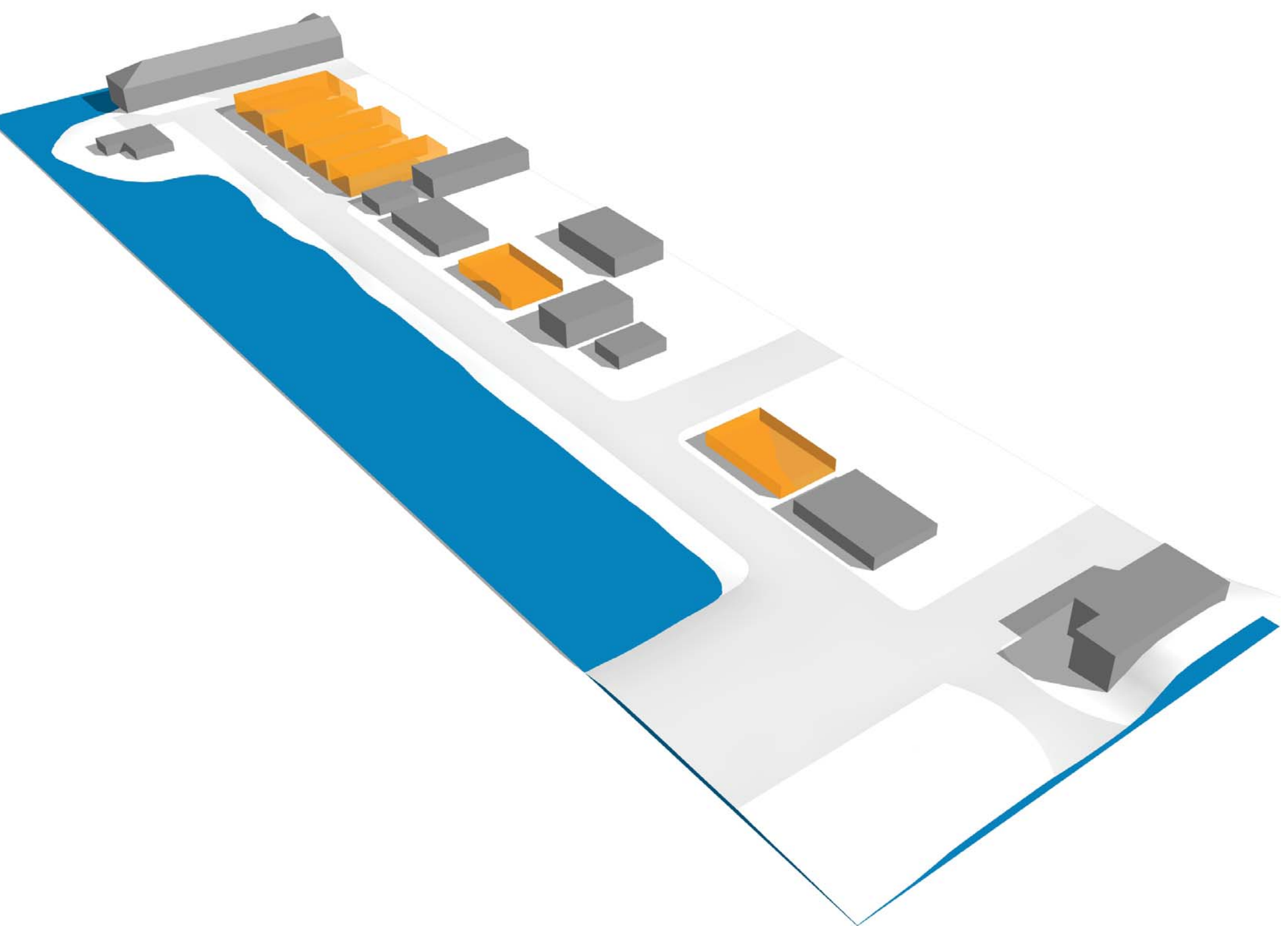
Capitalize on the already developing destination feel for St. Andrews as a vibrant waterfront hub of dining, retail, entertainment and residences. The goal is to increase more foot traffic in the area seven days a week, throughout the year.

## THINGS TO DO

---

- 1 Restaurant Row
- 2 Market Pier
- 3 Beck Avenue
- 4 Bayside Greenway

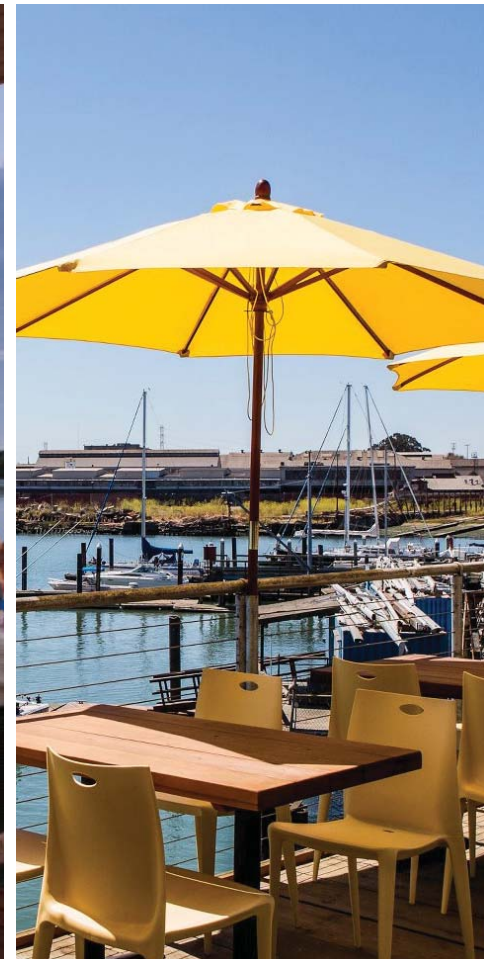




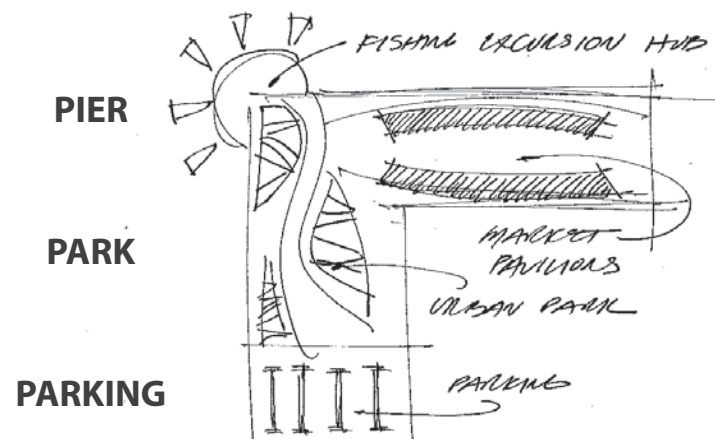
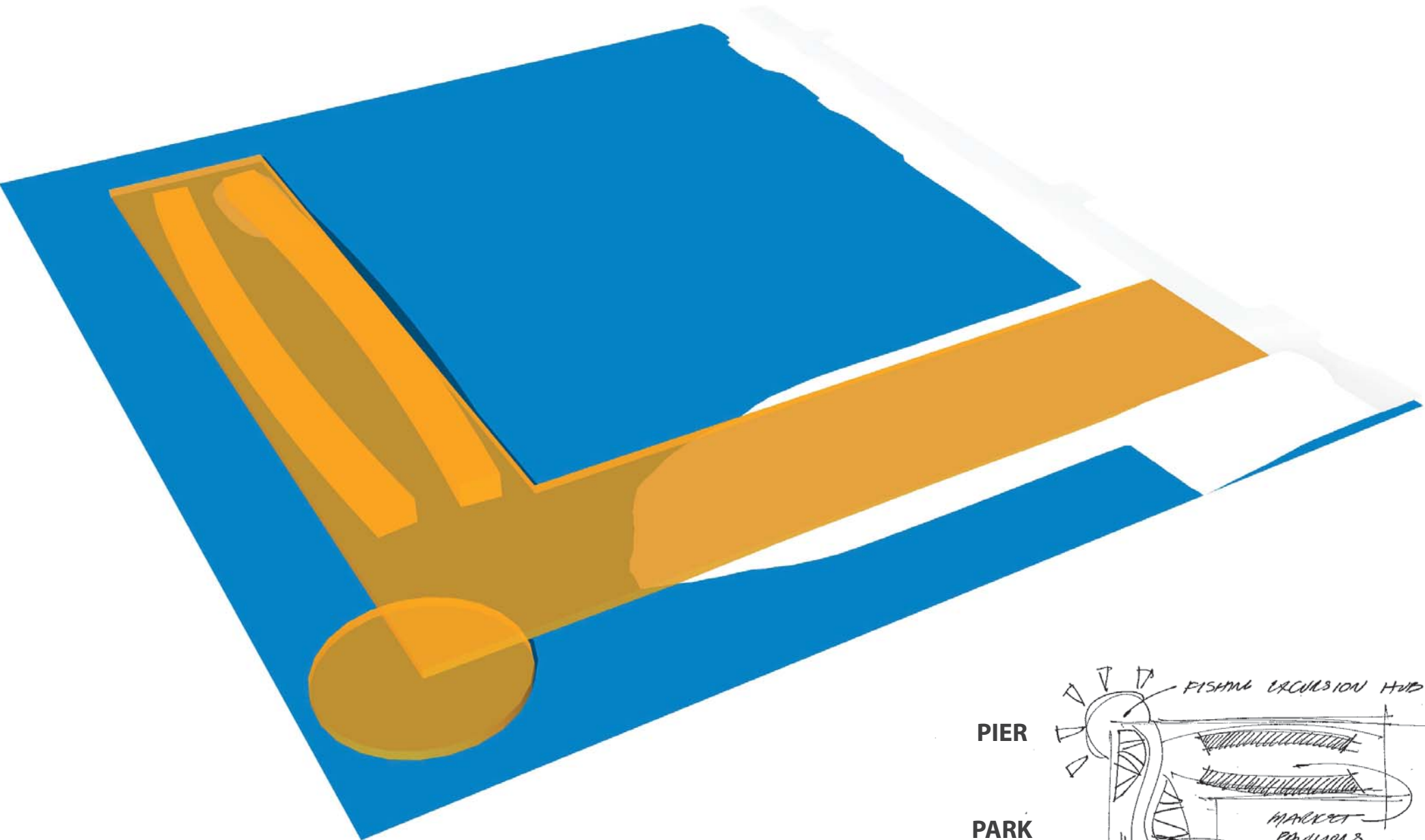
WHERE TO EAT

Enhance and expand the current variety of culinary experiences found in St. Andrews. The character, the sense of place is well established, however a continuation of the already successful dining experience of St. Andrews will only further promote this wonderfully eclectic district of Panama City.

# ENHANCE & EXPAND RESTAURANT ROW



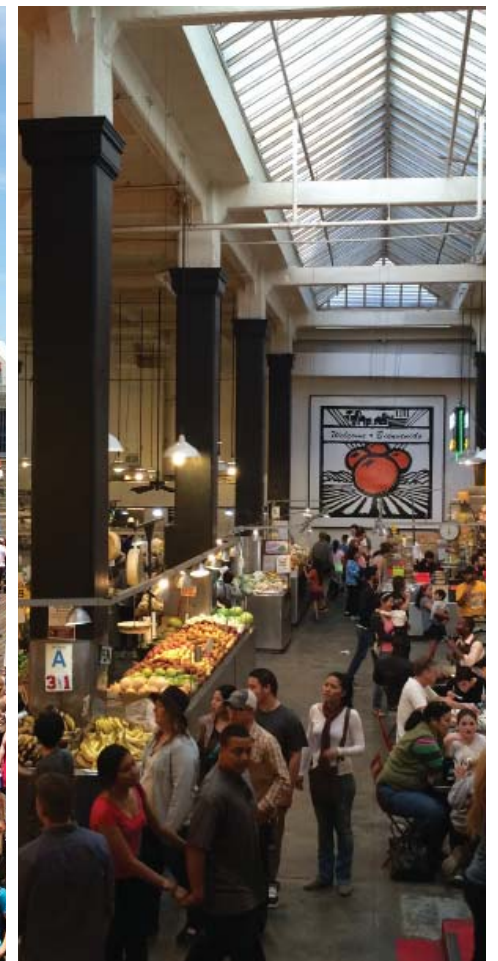
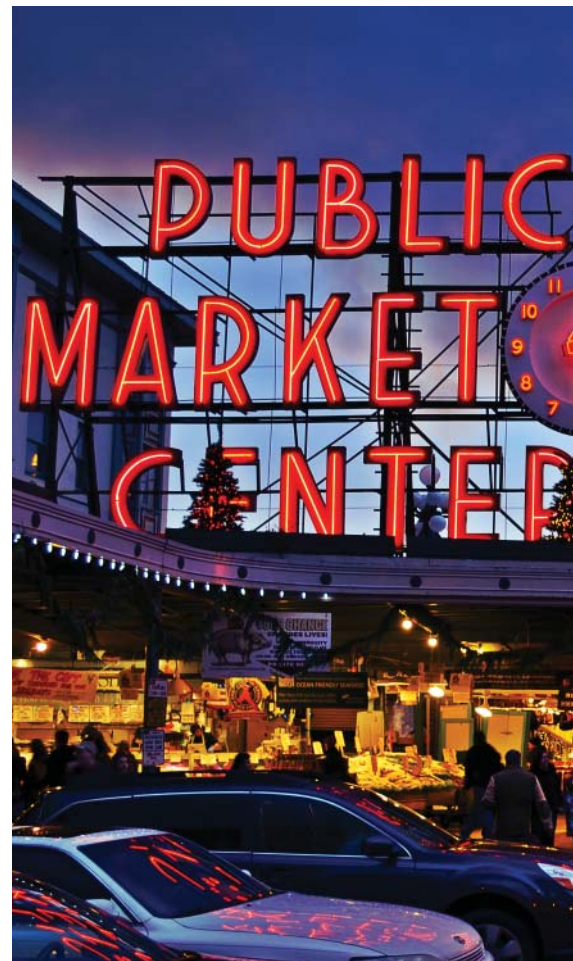




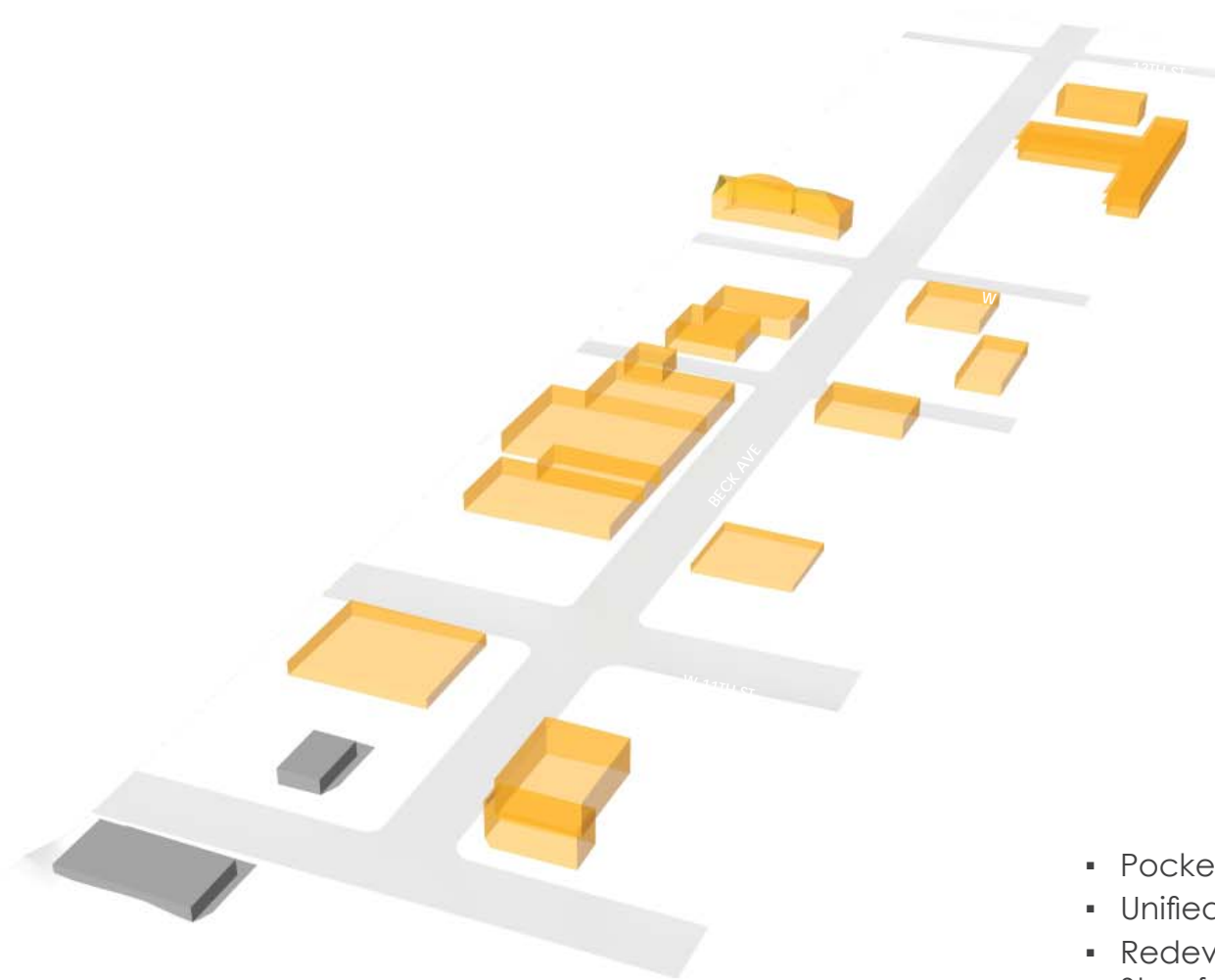
WHERE TO SHOP

Working in conjunction with the City's Marina group, explore the creation of a marketplace structure to attract new local vendors to showcase their products in a beautiful waterfront setting.

# DEVELOPMENT MARKET PIER







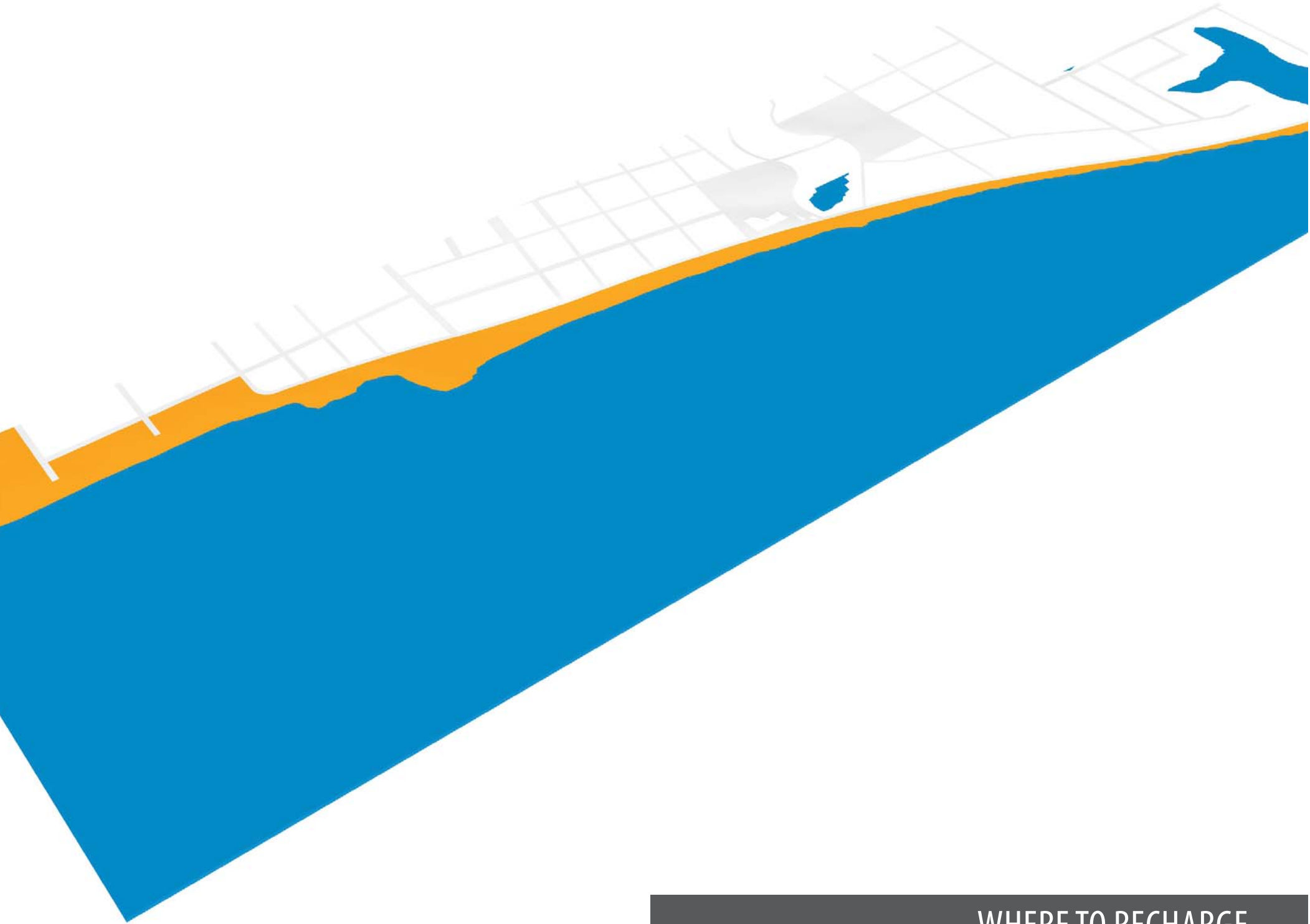
- Pocket Parks
- Unified Lighting
- Redevelop Dormant Storefronts
- Unified Architecture

Since this street already has a good bit of development momentum, we propose a series of street scape enhancements to foster additional improvements. Nice street lights, wider sidewalks capable of hosting outdoor cafes, landscaping and pavers will all enhance the character of this special street.

# ENERGIZE & ENHANCE BECK AVENUE





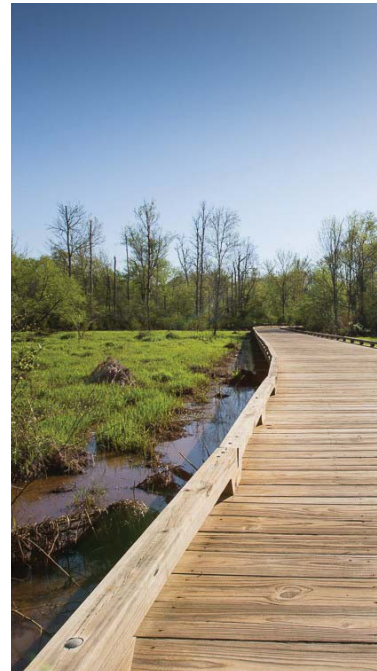
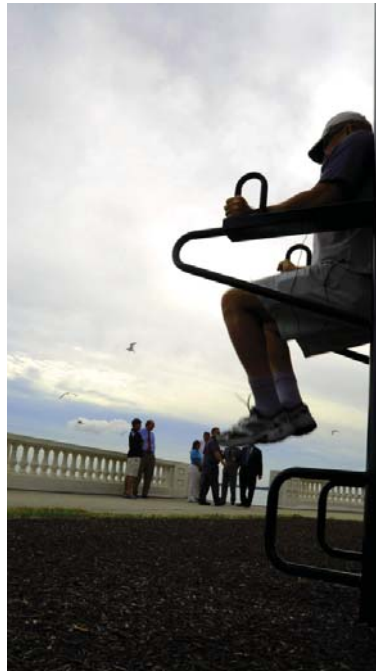


WHERE TO RECHARGE

Develop a waterfront path open to the public that connects St. Andrews through Downtown to the Cove. Similar to projects in many other cities, offer a paved connector wide enough for walking, jogging, bicycling and skating. While the Walk may need to be developed in stages, this will serve as a transformative connection for many areas of Panama City.



# BAYSIDE PEDESTRIAN LINK GREENWAY







*Things You Must Do While in Panama City*

# *DOWNTOWN NORTH*

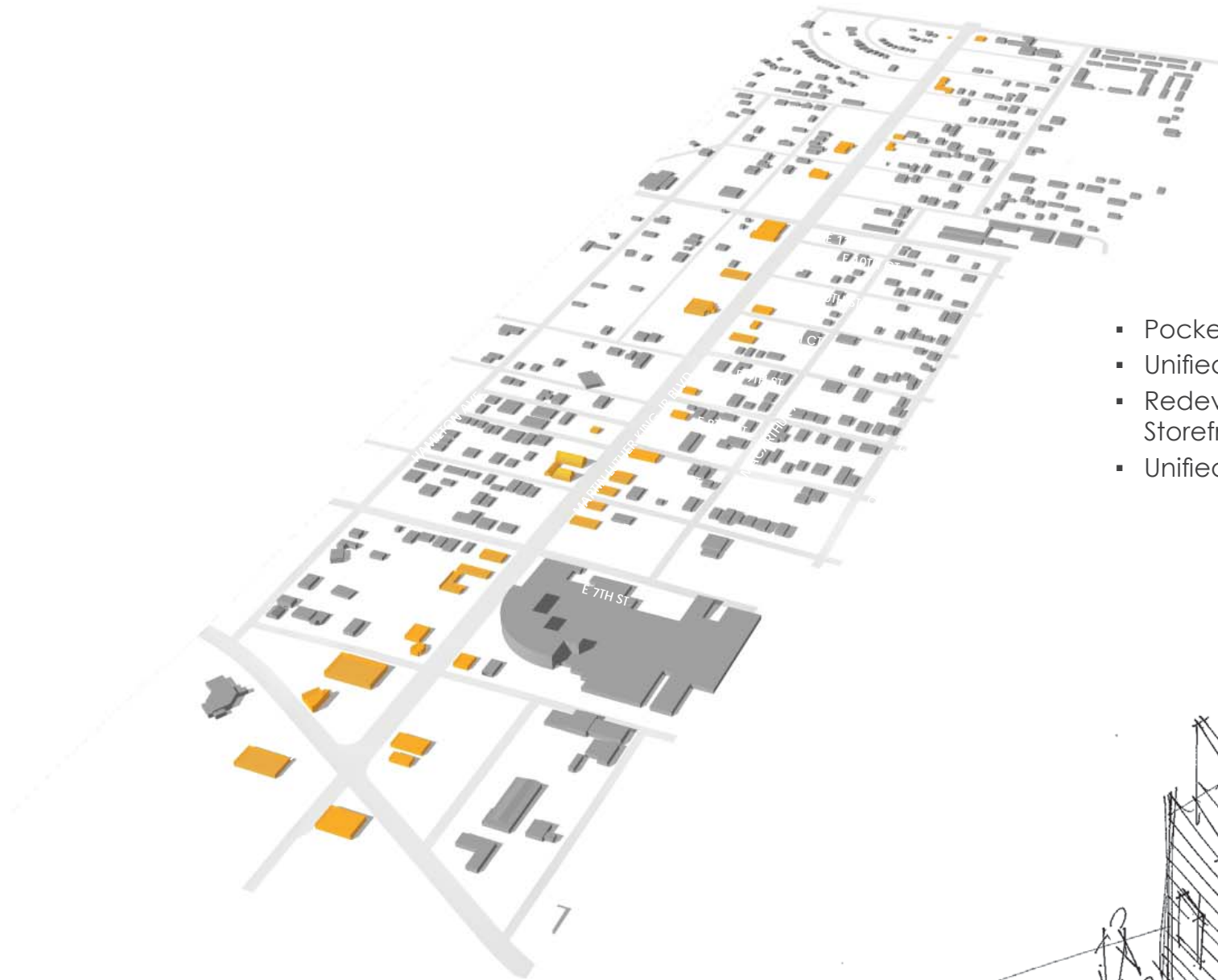
Improve the appearance of Martin Luther King, Jr Blvd while creating new modules of retail, healing and culture to celebrate the rich heritage of the Glenwood community.

## THINGS TO DO

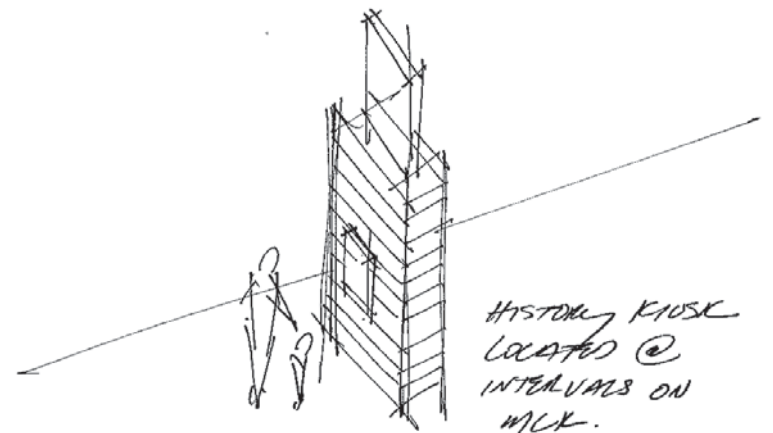
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- 1 Martin Luther King Jr Blvd
- 2 Shopping District
- 3 Community Center
- 4 Massalina Center for African-American Arts & Culture
- 5 Health & Wellness Mixed Use





- Pocket Parks
- Unified Lighting
- Redevelop Dormant Storefronts
- Unified Architecture



HISTORIC KIOSK  
LOCATED @  
INTERVALS ON  
WALK.

WHERE TO DISCOVER

Utilize landscaping elements, (plants, public art and flags/banners). Create an ongoing, seasonally changing public art campaign all along MLK and deploy a consistent program of roadside landscaping to celebrate the legacy of Dr. King.

# ENERGIZE & ENHANCE MLK JR BLVD





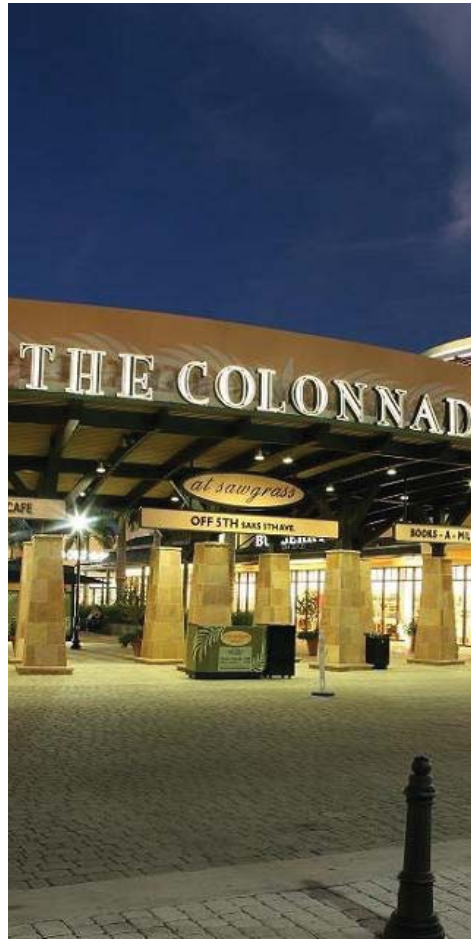
A recent trend in the shopping center industry converts challenged facilities into premium outlet malls. More and more companies, including aspirational brands such as Restoration Hardware, are opening outlet locations across the country. By offering distinctive shopping experiences, affluent travelers would flock to Panama City for quality goods at great values. It would also serve as a magnet to draw tourists at nearby beach towns in for a “day of shopping in town” and serve as an alternative for beachgoers during inclement weather.



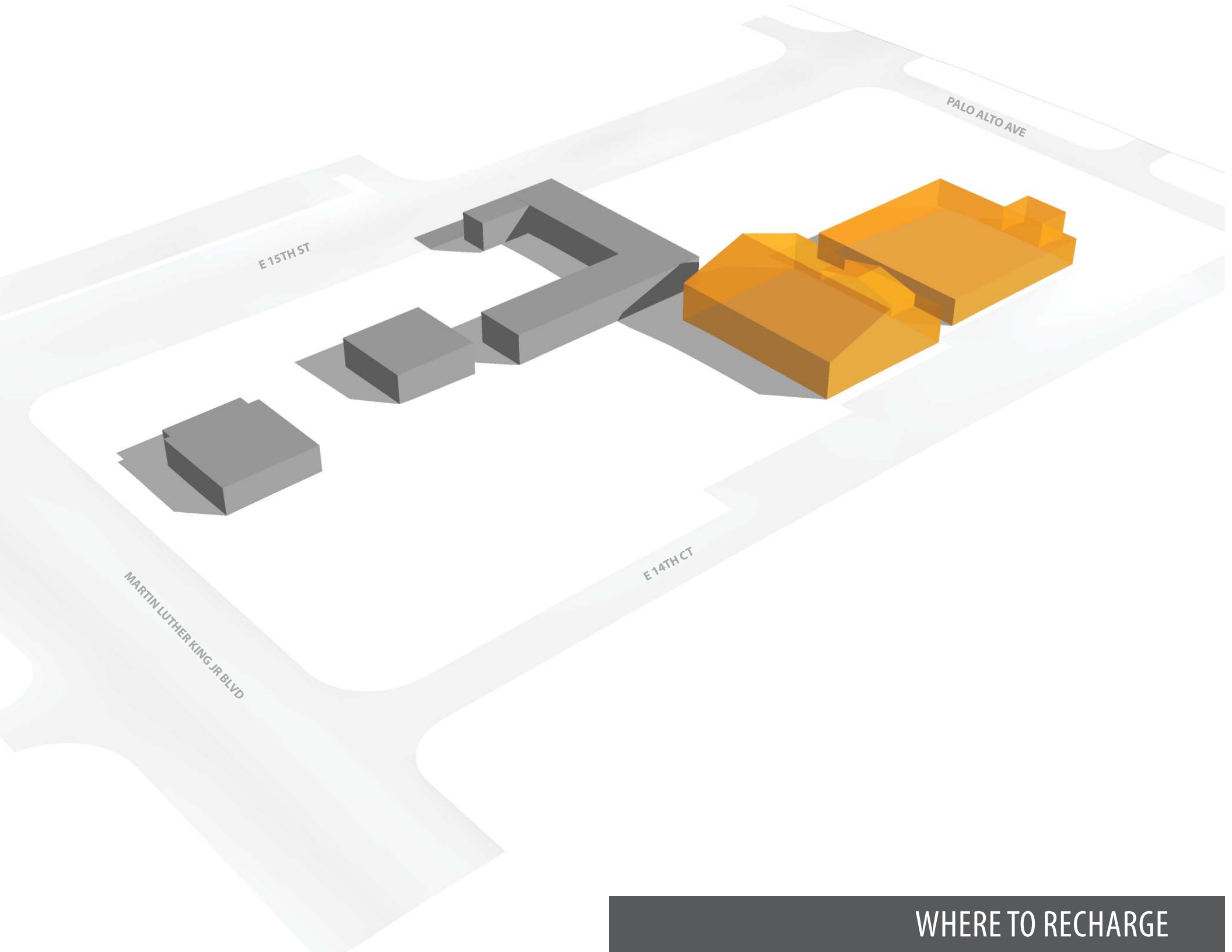
WHERE TO SHOP



# ENHANCE & EXPAND SHOPPING DISTRICT



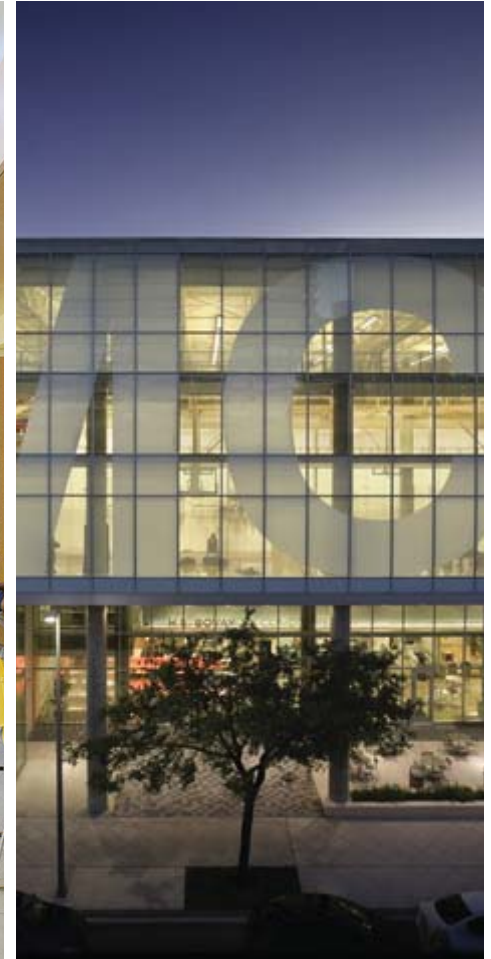




WHERE TO RECHARGE

The creation of a new community center / YMCA will provide a great resource for the community and in turn greatly enhance the Downtown North area - making it a viable local destination for all districts and providing another asset to promote the newly enhanced Martin Luther King Jr. Blvd. for larger regional tourism.

# ENERGIZE & ENHANCE COMMUNITY CENTER







WHERE TO DISCOVER

African-American travelers are one of the fastest-growing market segments in North America, spending \$48 billion on travel in 2014. Panama City has the opportunity to promote its distinctive African-American culture through a dedicated venue that celebrates the contributions of African American Spanish fisherman Josea Massalina. Visitors could uncover the culture and heritage of Red Fish Point, Massalina Bayou, the still-standing Rosenwald School, and perhaps trace their ancestry – also a major travel trend – to the region through interactive technology.



# AFRICAN-AMERICAN ART & CULTURE MASSALINA CENTER





Work in consort with local health providers to create a Healing District that would enhance the surrounding neighborhoods and begin to develop the potentially lucrative market for Medical Tourism. This would include the eventual development of additional lodging properties and mixed income residential communities..



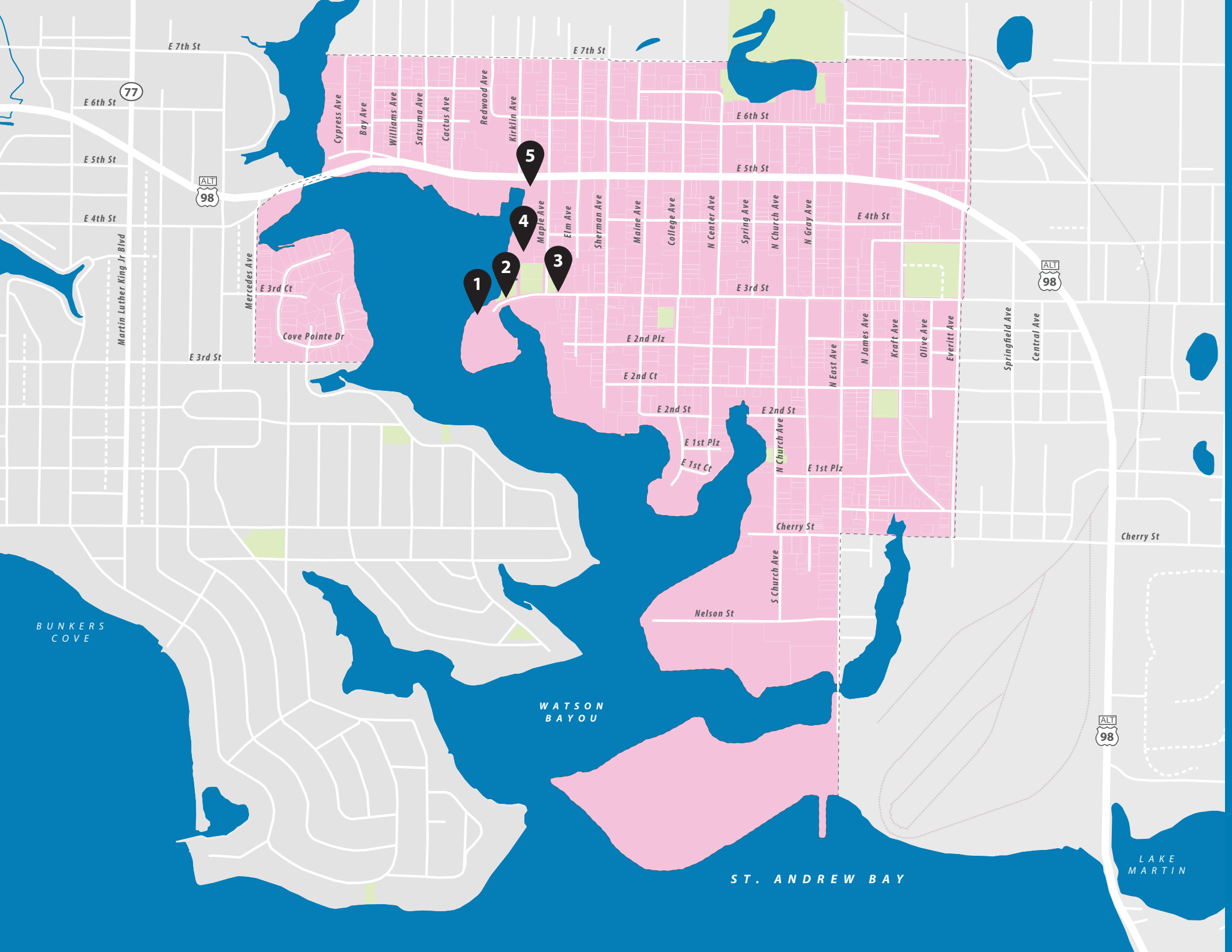
WHERE TO HEAL



# FOCUSED MIXED-USE HEALTH & WELLNESS







E 7th St

E 7th St

E 6th St 77

E 6th St

E 5th St

E 5th St

E 4th St

E 4th St

ALT 98

ALT 98

Martin Luther King Jr Blvd

Mercedes Ave

E 3rd St

Cove Pointe Dr

E 3rd St

E 3rd St

E 2nd Plz

E 2nd Ct

E 2nd St

E 2nd St

E 1st Plz

E 1st Ct

E 1st Plz

Cherry St

Cherry St

Nelson St

S Church Ave

BUNKERS COVE

WATSON BAYOU

ST. ANDREW BAY

LAKE MARTIN

1

2

3

4

5

Cypress Ave

Bay Ave

Williams Ave

Satsuma Ave

Cactus Ave

Redwood Ave

Kirklin Ave

Maple Ave

Elm Ave

Sherman Ave

Maine Ave

College Ave

N Center Ave

Spring Ave

N Church Ave

N Gray Ave

N East Ave

N James Ave

Kraft Ave

Olive Ave

Everitt Ave

Springfield Ave

Central Ave

*Things You Must Do While in Panama City*

# MILLVILLE

Capitalize on the waterfront access in Millville to expand the retail and dining available on 3rd Street, and giving both tourists and residents more reasons to spend time in Millville.

## THINGS TO DO

---

- 1 Maritime Museum
- 2 Shipbuilding Technology Center
- 3 Third Street Retail
- 4 Watson Bayou Park
- 5 Watson Bayou Waterfront Dining



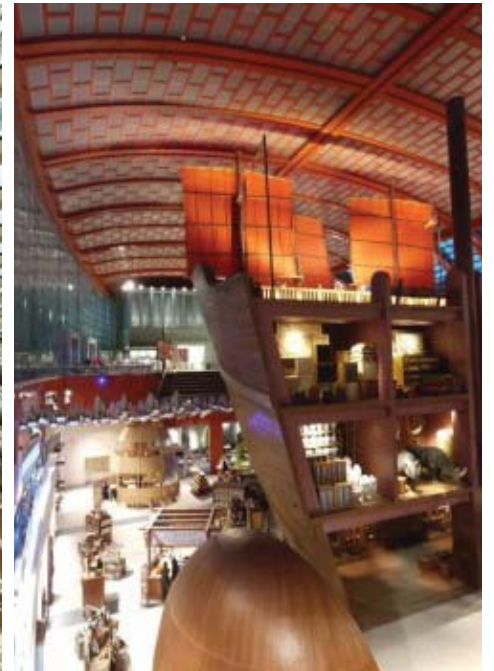
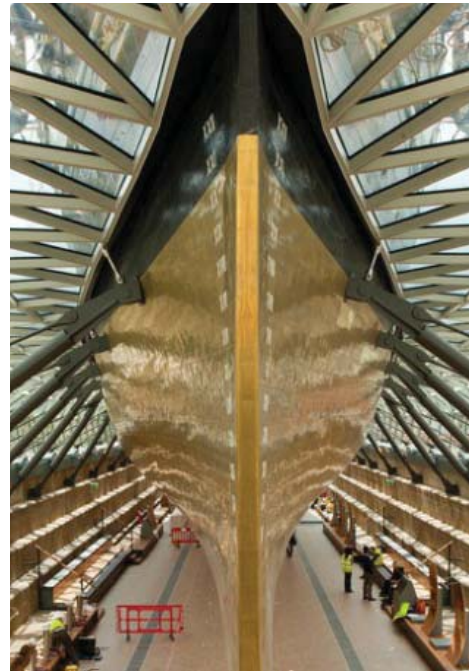


WHERE TO DISCOVER

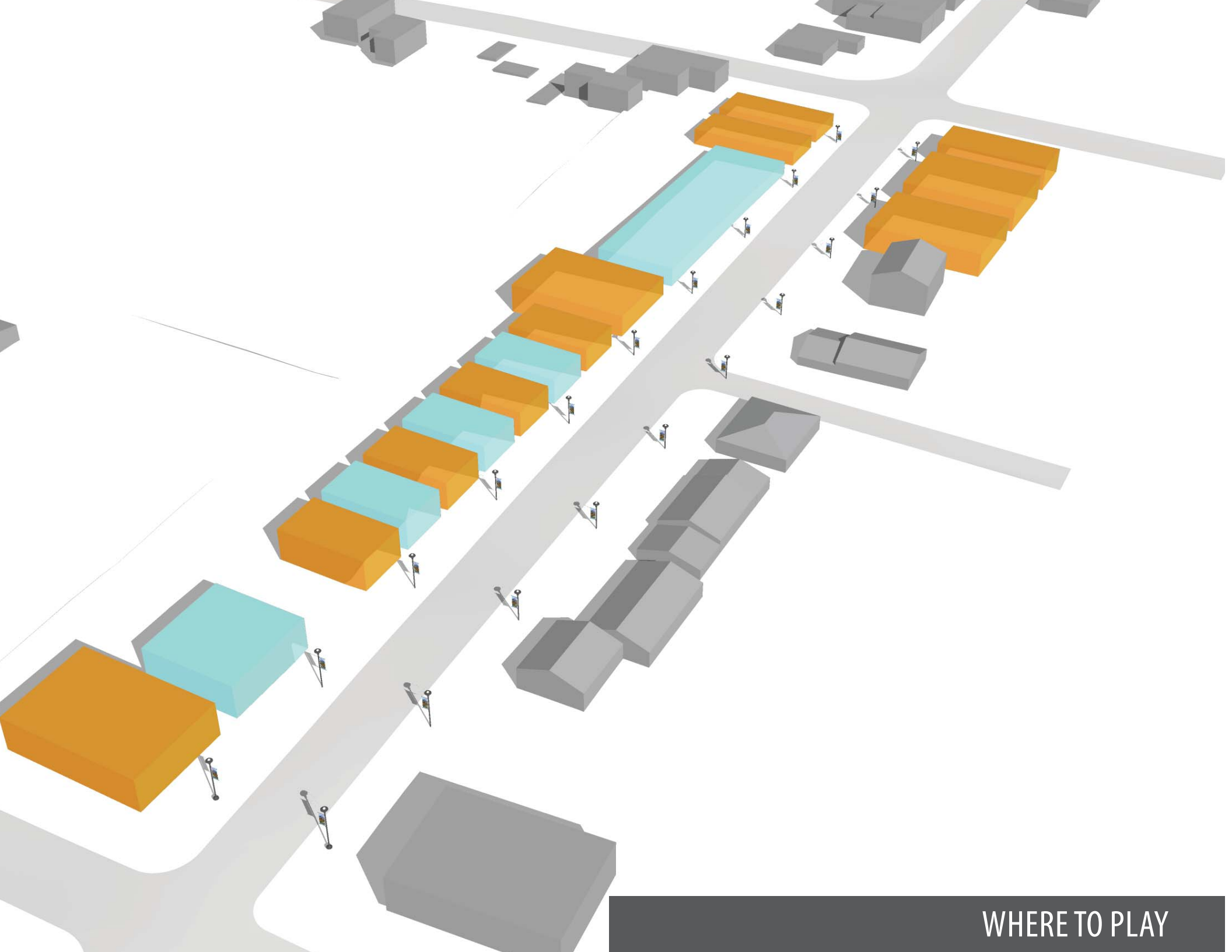
The historic waterfront community of Millville is home to Eastern Shipbuilding Group, one of today's leading innovators in marine construction and repair. As the company continues to seek a skilled workforce, with a dedicated effort to attract veterans, and the maritime industry continues to grow with the expansions of the Panama and Suez Canals, the timing is right for a facility that pays homage to Millville's past and present while serving as a training center for future employees.



# SHIPBUILDING TECHNOLOGY CENTER & MARITIME MUSEUM







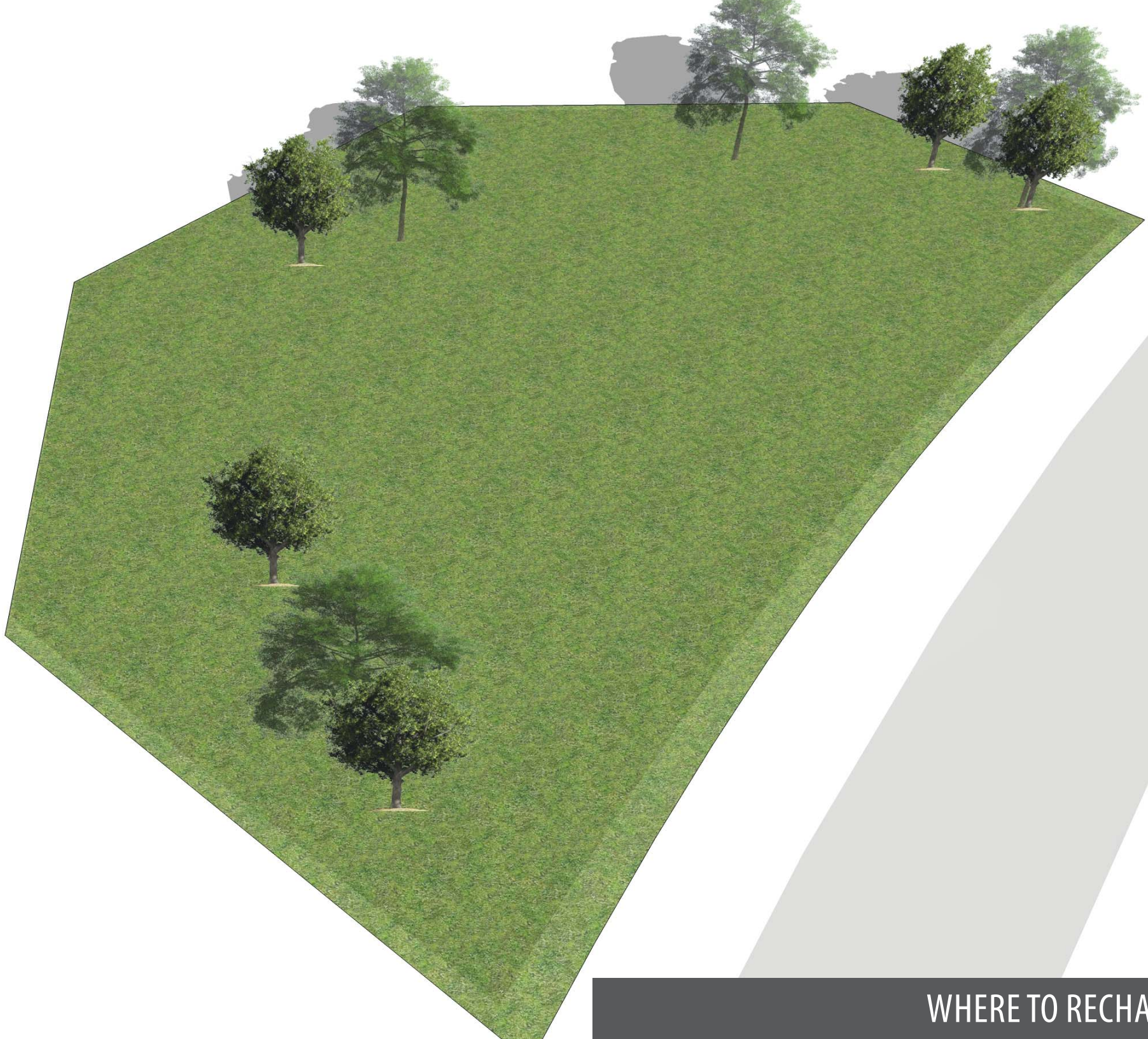
WHERE TO PLAY

If possible, expand sidewalks from Sherman Avenue (Gene's Oyster Bar, Sweet Magnolia's, etc.) to the City's Waterfront Park at Watson Bayou. This would encourage the creation of new retail/dining options and extend the scope of the Millville Business District.

# ENHANCE & EXPAND THIRD STREET RETAIL







WHERE TO RECHARGE

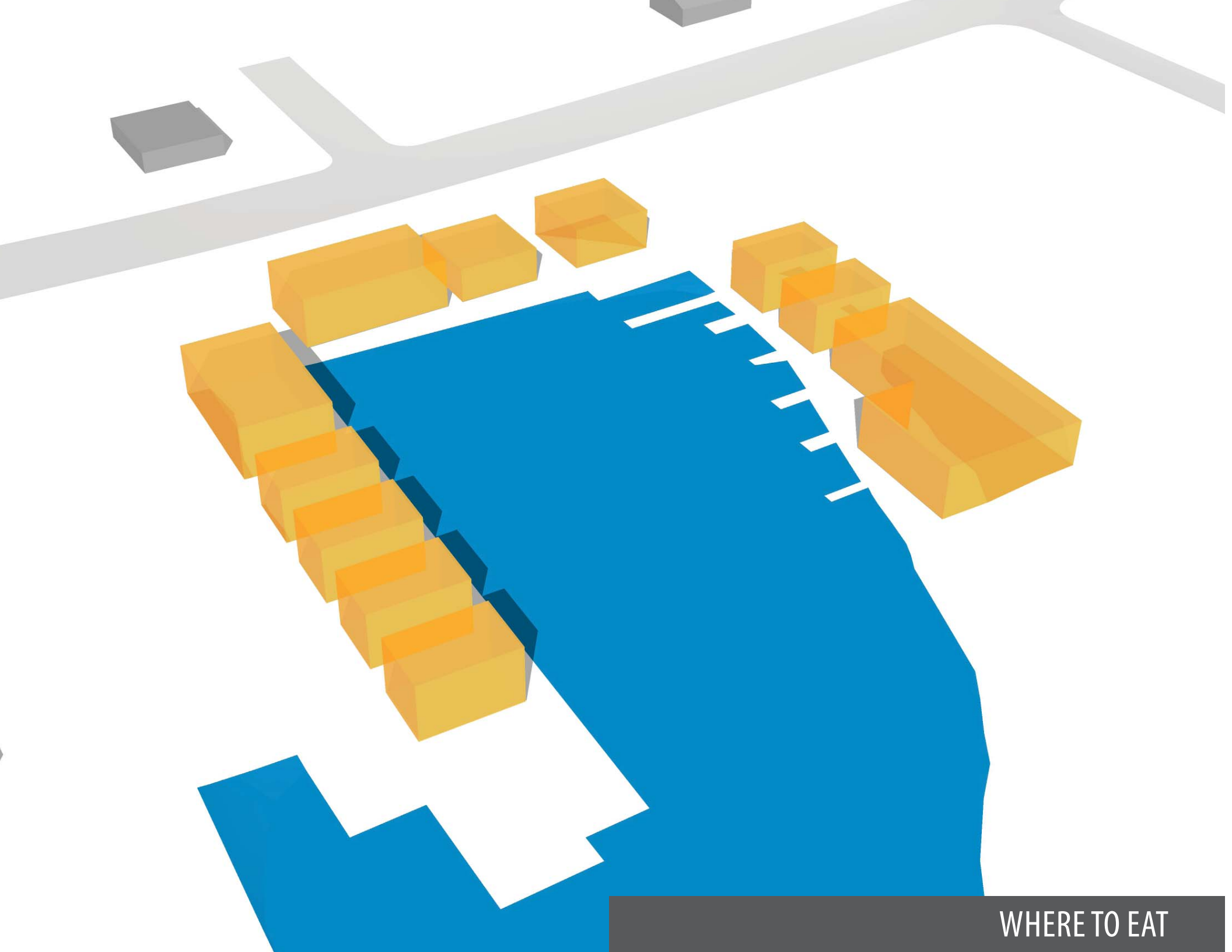


Improve offerings to the public to encourage more visitations to the park.  
Create a kids' play area, using ship building and ship artwork as a theme.  
Possible rentals of canoes, kayaks, paddle boats, etc...

# REDEVELOP WATSON BAYOU PARK



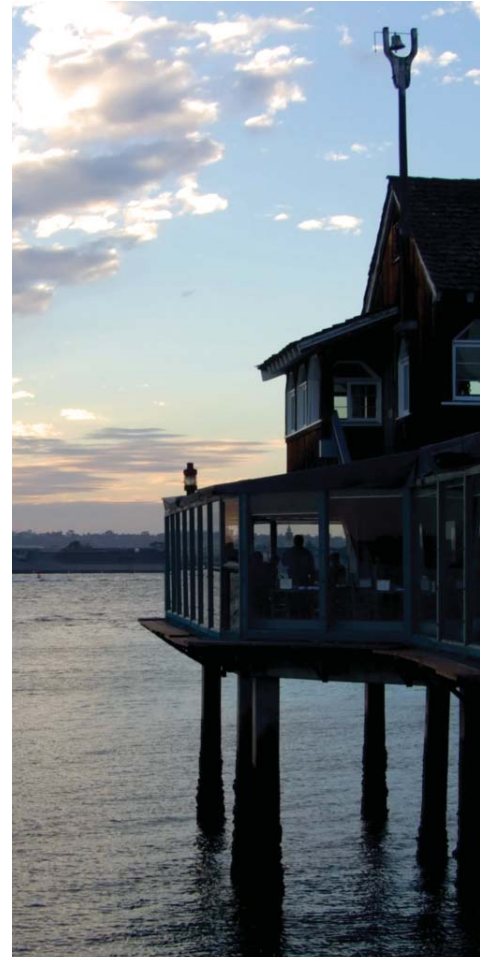




WHERE TO EAT

Encourage development of restaurants overlooking Watson Bayou – either at the western end of 3rd Street or along 5th St. / US Highway 98.

# WATERFRONT DINING WATSON BAYOU







CHAPTER 4

# ***APPENDIX***







DAYT

THE SHAD

PANAMA CITY

5928

*Tourist Development & Economic Opportunity*

# *CASE STUDIES*

## DESTINATION CASE STUDIES:

*What follows are a series of case studies that represent destinations with assets similar to Panama City. The studies demonstrate how cities can use existing resources as a catalyst for tourism development and expansion of economic development opportunities. The studies conducted were the following:*

- BEAUFORT, SOUTH CAROLINA
- COLUMBUS, GEORGIA
- GREENVILLE, SOUTH CAROLINA
- PADUCAH, KENTUCKY
- SAVANNAH, GEORGIA



## SPECIAL THANKS

We'd like to express thanks to the following list of interviewees who generously donated their time assisting in this endeavor, without their cooperation we would not have been able to complete a study of this magnitude.

Mayor Greg Brudnicki

Commissioner John Kady

Commissioner Mike Nichols

Commissioner Kenny Brown

Commissioner Billy Rader

Dave Dyell – President, CEO – Jellyfish

Crook and Vickie Stewart – Music Matters

Becca Hardin – Bay County Economic Development

William Harrison – Attorney

Doug Sale – Attorney

Harry Patel – Patel Hotels

Chase Patel – Patel Hotels

Christine Reiss – Panama City Sailing

Jennifer Jones – Bay Arts Alliance

John Bozarth – Bay District Schools

Helen Ballance – Art on Beach

Valerie Sale – Bay County Public Information Officer

Barbara McMinis – Martin Theatre

Stan Jones – Panama City Marina

Tony Simmons – News Herald

Heather Parker – Floriopolis

Mat Wyble – CityArts Cooperative

Margaret Webster – Public Eye Soar

Heather Clements-CityArts Cooperative

Dan Bailey-Amavida Coffee & Trading Company

Sharon Hillstrom - President, Bradenton Area Economic Development Council

Gary Pluchino - Senior Vice President, IMG Academy

### Savannah Case Study

Christian Sottile – Dean, SCAD School of Building Arts

Harold Yellin – Attorney and Past Chair of Savannah Music Festival

### Greenville Case Study

Knox White – Mayor

### Columbus Case Study

Richard Bishop – President, Uptown Columbus, Inc.

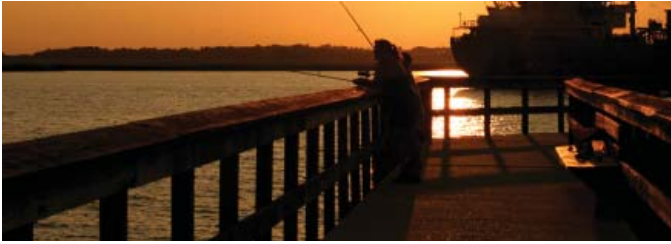
Becca Hardin – Former VP of Economic Development, Greater Columbus Chamber of Commerce

### Beaufort Case Study

Richard and Deborah Stone – Owners, Beaufort Bread Company; members, Beaufort Arts Council and Historic Beaufort Foundation

### Paducah Case Study

Robin Malpass – Robin Malpass and Associates



▪ BEAUFORT, SOUTH CAROLINA:

Home to the Beaufort Marine Air Corps base and Parris Island Recruit Depot and located within minutes of Hilton Head, a popular tourism destination, Beaufort capitalized on its waterfront location and historic architecture through an innovative partnership with the University of South Carolina Beaufort. As a result, its historic downtown has been completely revitalized as an arts and cultural destination.



▪ COLUMBUS, GEORGIA:

The Chattahoochee River has always played a vital role in the economic success of Columbus and when the industrial boom came to an end, the City reinvented itself by opening a two-and-a-half mile stretch of the Chattahoochee to whitewater rafting and kayaking. Thousands of visitors now literally flow through downtown Columbus. Home of Fort Benning and a thriving university, Columbus is now a hub for visitors and cultural creatives, who are ushering in a new era of urban development.



▪ GREENVILLE, SOUTH CAROLINA:

Through public-private investment strategies and a carefully crafted marketing campaign, "Downtown is everyone's neighborhood," the city of Greenville successfully transformed their decaying downtown into a popular destination for visitors and residents. Providing better access to their water resources was the catalyst for revitalization. Now home to the new Peace Center for Performing Arts and the West End Baseball Stadium and Field House, Greenville welcomes thousands of visitors each year.



▪ PADUCAH, KENTUCKY :

A disillusioned new resident, a sympathetic city council, and a forward-thinking local bank, were the catalyst for an award-winning artist relocation program that transformed a sleepy river town into a thriving destination. Now recognized by UNESCO as one of the worlds' "Creative Cities," Paducah's success is highlighted in the enclosed 2014 report by the American for the Arts organization, "How to Attract Cultural Visitors and Their Spending."



▪ SAVANNAH, GEORGIA :

Water access and higher education were the key drivers in establishing Savannah as one of the nation's most successful cultural destinations. Over the past twenty-years, the Savannah School of Art & Design has completely restored Savannah's historic downtown's architecture and contributed to its artistic character. With a new convention center and arena, Savannah's unique sense of place attracts thousands of visitors each year.



WELCOME TO HISTORIC  
**BEAUFORT**

E S T .



1711



# CASE STUDY

# BEAUFORT, SC



Chartered in 1711, Beaufort is the second oldest city in the State of South Carolina. Historically, the community relied on agriculture and its location adjacent to the Atlantic Ocean as the primary influences for economic vitality.

In the 1940's, the local economy began a steady shift to the recognition of the presence of two large United States Marine Corp Bases and their related facilities:

- **Marine Corps Air Station Beaufort** – opened in 1943 and is now home to approximately 700 Marines and Sailors, plus 600 civilian employees.
- **Parris Island Marine Corp Recruit Depot** – Established in 1915 is one of two Marine Corps Training facilities in the United States. The annual population of MCRD Parris Island is 23,000 – including 16,000 recruits and 1,000 civilians.
- **Beaufort Naval Hospital** – Opened in 1949, BNH serves approximately 31,000 beneficiaries.

***Tourism began to flourish in the 1970's and 1980's due to a few impactful developments:***

***The aggressive transformation of nearby Hilton Head Island as a tourist destination*** – began in the late 1960's and into the 1970's. Thousands of vacation homes were developed along with large numbers of hotels including properties with such national brands as Hilton, Hyatt, Westin and Marriott. Hilton Head Island also became known for its abundance of world class golf courses and is the annual home of the PGA Tour RBC Heritage Classic at Sea Pines Plantation. Hilton Head is now the third most visited destination in South Carolina (behind only Charleston and Myrtle Beach).

***The Beaufort community realized an enormous opportunity to take advantage of the large number of annual visitors to nearby Hilton Head Island*** – Strategies were crafted to entice those visitors to begin spending time in Beaufort – offering an alternative to the beach oriented Hilton Head visitors. Local leaders made the decision to focus on history, arts and culture and the vibrancy created by institutions of higher education.



*Beaufort began to become a location for the filming of successful movies* – such as *The Big Chill*, *Great Santini*, *Prince of Tides*, *Forrest Gump* and *Something to Talk About*. The books that were the basis for *Great Santini* and *Prince of Tides* both took place in Beaufort – the home of author Pat Conroy. The local tourism community has embraced its notoriety as a film location and features tours specifically designed to visit the locations shown in the individual films.

*Beaufort committed to develop as a home for artists and their galleries* – A number of local initiatives attracted emerging young artists to move to Beaufort and showcase their creations. The Arts Council of Beaufort County was formed in 1991 and spearheads many of these efforts, including the establishment of ARTworks.

ARTworks is a creativity machine: concerts and plays in the theater; artists working in their viewable studios; gallery shows throughout the year, hands-on workshops; and the offices of the Arts Council of Beaufort, Port Royal, and the Sea Islands. The 12,000 square foot space is free to browse, and contains an info station with brochures and maps leading to more local artists. Strings-n-Things music shop is also here.

ARTworks is a 501(c)3 organization founded in 1991. Its mission is to apply the many creative tools of The Arts to strengthen artists and to enrich audiences, collectors, and visitors through high quality arts experiences and arts education programs 365 days a year. In addition, ARTworks funds an Artists in residence program which supplies the resources necessary to establish their passion as a means of financial independence.







***The growth of the University of South Carolina Beaufort campus*** – Two major programs offered at USCB are Fine Arts and Hospitality Management.

Since inception, the arts have played a critical role at USCB. Today, USCB’s Historic Beaufort campus is an arts and cultural hub for people throughout the community. It’s no wonder Beaufort has been recognized as one of America’s top 100 art towns by author John Villani, designated as a Small City Arts Destination by AmericanStyle Magazine, and is known as the happiest coastal town by Coastal Living. USCB and the surrounding communities provide a vibrant art community through:

- ***The Sea Islands Center*** – on the Historic Beaufort campus, which includes a gallery, faculty offices, and a studio for students.
- ***The Nearly 20 Art Galleries*** – in Beaufort and the surrounding Sea Islands, with hundreds of local residents contributing to the art scene.
- ***The Center for the Arts*** – on the Historic Beaufort campus, which holds a 400+ person auditorium, two public art galleries, a drawing and painting studio, ceramics studio, and 3D design studio.

USCB’s Center for the Arts encourages cultural and economic development within the City and County of Beaufort by hosting art exhibits, theatrical events, concerts, and other performances.



It is also home to the USCB Festival Series hosted by Ed Arron.

USCB’s vision calls for the Center for the Arts (CFA), formerly known as the USCB Performing Arts Center (PAC), to serve as a regional focal point for the arts through quality performances, gallery events, and academic degree programs. The CFA has been the cultural hub for Beaufort County for over thirty years housing the Beaufort Orchestra, USCB Festival Series, Beaufort Theatre Company, and countless performances of internationally acclaimed performing artists. USCB has a long-standing tradition of endorsing and supporting the arts, recognizing the importance of family and community programming such as Beaufort Children’s Theater and PJ and Play. Additionally, USCB provides the use of a 460-seat performing arts venue to community groups, dance studios, festivals, and the Met Opera Live in HD.

This year, the CFA is proud to be joining the Emerging Pictures network of cinemas. This partnership offers a rare opportunity for the Beaufort community to enjoy pristine presentations of first run independent, and foreign, narrative films and documentaries, as well as a selection of specialized events – such as the Bolshoi Ballet – all in crystal-clear High Definition.

The combination of these efforts featuring cultural arts, performing arts, history and education has enabled Beaufort to not only capitalize on the millions of annual visitors to Hilton Head Island, but to create its own unique identity as a tourist destination.

The University of South Carolina Beaufort also offers major programs in Hospitality and Restaurant and Tourism Administration. Taking advantage of being located in Beaufort and near Hilton Head Island, USCB promotes “Coastal South Carolina: A Great Place to Live and Learn – Study Hospitality in World Class setting.”

With world-class golf, tennis, boating and accommodation facilities, beaches, creeks and marshes, excellent dining and nightlife, arts and cultural centers, and environmental and historical educational sites and programs, this region offers the perfect learning laboratory for hospitality studies. A variety of internships and employment opportunities are available for students and graduates on Hilton Head Island, in Beaufort as well as Savannah. Many local businesses provide tuition assistance for Hospitality Management students who work in the field while completing an internship as part of the degree program.





1882

# CASE STUDY

# COLUMBUS, GA



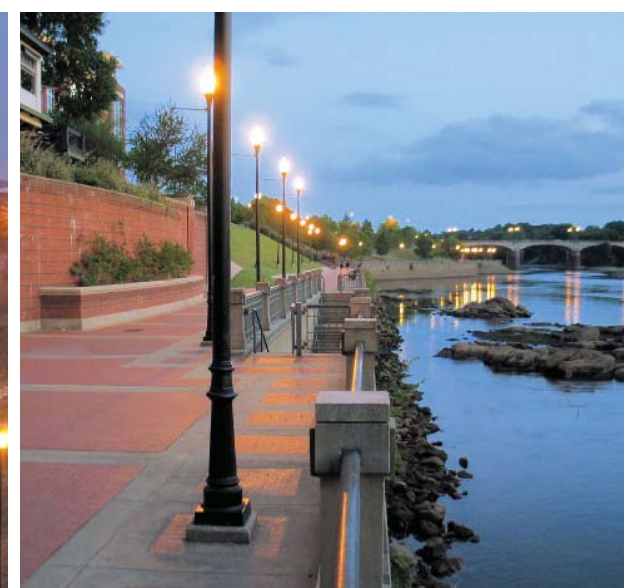
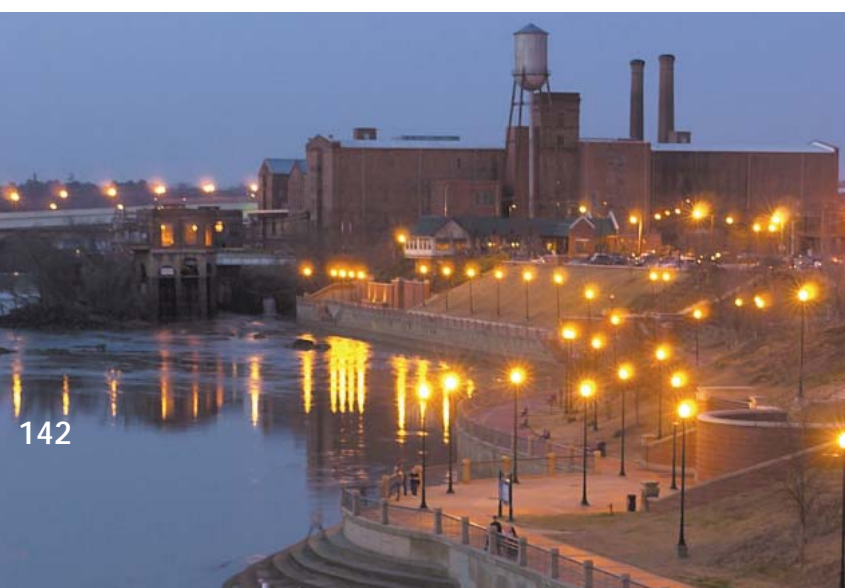
Columbus was founded in 1828, primarily as a major textile mill and transportation economy based on its proximity to many large cotton plantations. As the city has turned from its initial industry of textiles, it has provided a home for other prominent industries including the headquarters for Aflac, Synovus, TSYS and Carmike Cinemas. Columbus' economy is also largely dependent on the presence of Fort Benning. Opened in 1918, Fort Benning is one of our country's largest military installations in the world. Columbus is also famous as the city where Coca Cola was invented.

Like many other southern cities in the 1960s and 1970's Columbus faced urban blight and white flight. Early efforts to halt the gradual deterioration of downtown began with the saving and restoration of the Springer Opera House in 1965. With the revitalization of the Springer and its subsequent designation as the State Theatre of Georgia, a historic preservation movement was sparked and various historic districts were established in and around downtown.

Through the late 1960s and early 1970s, large neighborhoods were built to accompany the soldiers coming back from the Vietnam War and for over from Ft. Benning. Large tracts of blighted areas were cleaned up and the new Columbus Consolidated Government Center was constructed in the city center. A significant period of urban renewal and revitalization followed in the mid to late 1990s.

With these improvements, residents and businesses began moving back to formerly blighted areas. Examples of these municipal projects including the construction of a softball complex which hosted the 1996 Olympic softball competition, construction of the Chattahoochee RiverWalk along the Chattahoochee River, construction of the National Civil War Naval Museum at Port Columbus, construction of the Coca-Cola Space Science Center, the expansion of the Columbus Museum, and road improvements to include a new downtown bridge crossing the Chattahoochee River.









## ONE OF THE KEY COMPONENTS IN THE REVITALIZATION OF COLUMBUS IS THE RIVERWALK

The Columbus Riverwalk is one of the largest and most successful such efforts in the South. It links an array of historic sites and points of interest while also providing ecotourism and exercise opportunities for the Georgia city.

The Columbus Riverwalk is the result of brilliant forward thinking that began in 1987-1988 when the federal government required massive upgrades to the city's sewage and water systems. Instead of demolishing the landscape to make way for such work, leaders and engineers in Columbus saw it as a way to spark a revitalization of their historic city. The results are stunning and the Columbus Riverwalk is now one of the largest and most successful such projects in the nation.

Construction of the riverwalk began with a one mile stretch in the downtown area in 1989. Opened on Columbus Day in 1992, the section stretched from the dam visible from the downtown bridges to the Columbus Ironworks Trade Center, a magnificent convention facility developed in the city's historic ironworks. This section of the project remains extremely popular, especially since the addition of Columbus State University School of Music to the downtown area.

Columbus has also established itself as a center for the fine and performing arts. RiverCenter for the Performing Arts, which opened in 2002, houses Columbus State University's music department. In 2002 Columbus State's art and drama departments moved to downtown locations. Such initiatives have provided Columbus with a cultural niche and with vibrant and modern architecture mixed among older brick facades.

The "Ready to Raft 2012" campaign is a project that created an estimated 700 new jobs and is projected to bring in \$42 million annually to the Columbus area. The project resulted in the longest urban whitewater rafting venue in the world. This, in addition to other outdoor and non-outdoor tourist attractions, led to around 1.8 million visitors coming to Columbus during the fiscal year 2015, according to the Columbus Convention and Visitors Bureau.

*The following are two stories in Georgia Trend magazine that details the roles played by government, private sector and Columbus State University in the recreation of Downtown Columbus, GA:*







# COLUMBUS: COMPLETING THE TRANSFORMATION

Success builds on success

Randy Southerland



**Downtown Residential:** Mathews Swift, president and COO of W.C. Bradley Co. Real Estate Division

<http://daemonpictures.com>

## Community Snapshot

### Local Leaders

Mike Gaymon  
President & CEO Greater Columbus Georgia Chamber of Commerce  
706.327.1566  
[mgaymon@columbusgachamber.com](mailto:mgaymon@columbusgachamber.com)

Becca Hardin  
Executive Vice President Economic Development  
The Valley Partnership  
Greater Columbus Georgia Chamber of Commerce  
706.257.1190  
[bhardin@columbusgachamber.com](mailto:bhardin@columbusgachamber.com)

Teresa Tomlinson  
Mayor of Columbus  
706.225.3164  
[ttomlinson@columbusga.org](mailto:ttomlinson@columbusga.org)

### Population (2012)

198,413

### Median Household Income (2011)

County, \$41,088  
Georgia, \$46,007

### Unemployment (February 2013)

Columbus, 9.3 percent  
Georgia, 8.6 percent

### Top Employers

Fort Benning, Muscogee County School District, TSYS, Columbus Regional Healthcare System, Aflac, Kia Motors Manufacturing Georgia

### Sources

U.S. Census Bureau, Georgia Department of Labor, Greater Columbus Chamber of Commerce

The river has always been the lifeblood of Columbus and Muscogee County. The waters of the Chattahoochee powered its mills for more than a century and turned this small West Georgia city into a major industrial center. Its location on the fall line meant that ships making their way up from the Gulf anchored here to unload passengers and freight.

These days the mills are mostly closed, but the river is still powering an economic resurgence. Just last month, the city officially opened a two-and-a-half mile stretch to whitewater rafting and kayaking. Beginning just north in the old Bibb City area, the course flows through Uptown with a takeout point just behind the Convention & Trade Center.

“This will not only have a tremendous economic impact on the community, but it’s a great environmental project as well,” says Richard Bishop, president and CEO of Uptown Columbus. “We’re going to bring visitors from throughout the Southeast and attract world-class events here at the same time.”

For many, the \$26 million the city spent to breach the Eagle & Phenix Dam and return quiet waters to their original fast-rushing beauty was well spent. As word spreads of this year-round course, more than 188,000 visitors are expected, which should generate an economic impact of roughly \$42 million, according to Bishop.

The river will likely solidify the quarter-century-long transformation of Columbus from dying downtown to hip center of culture and commerce.

Convention and Visitors Bureau official Kimberly Parker Kaup recalls that growing up in Columbus, “We never went downtown.” These days, the stretch of renovated mills and historic buildings is the first place she shows people who want a taste of the real Columbus.

Clubs, restaurants, coffee shops and boutiques fill every available storefront. Finding a parking space even on a weekday night is a challenge as throngs of people – mostly young – fill the streets. Many are students and faculty from Columbus State University



(CSU), which purchased a number of historic buildings and then moved its music, theater, arts and communications programs here from the main campus.

“It was a vision that began well over a decade ago, and to me it was a great realization of a city-university partnership,” explains CSU President Dr. Tim Mescon.

As a generator of nearly \$300 million in economic impact to the region, the university joined a cadre of corporate entities that call Uptown home. A few blocks away, the corporate headquarters for Total System Services, Inc. (commonly referred to as TSYS) overlooks the rushing waters of the river.

## Describing Success

“I’ve been in real estate development for 25 years with the Bradley Company, and the best way to describe it is with each successful project, it leveraged another successful project,” says Mathews Swift, president and COO of W.C. Bradley Co. Real Estate Division.

After the city raised \$100 million in the Columbus Challenge to construct the RiverCenter performing arts facility, CSU undertook its own \$100-million fund-raising campaign. That allowed the arts programs to move to Uptown. The university’s highly regarded music school now occupies one side of the RiverCenter.

Swift’s own company is not only headquartered in one of the renovated mill buildings along Front Street, but it has been a driving force in promoting Uptown as a place to live.

When the Eagle & Phenix building’s first phase was converted to condos, they quickly sold out. Offering a commanding view of the river, coupled with easy access to Uptown’s shops and restaurants, they represented just the kind of urban living so many young professionals demand.

146 Apartments are under construction in Mill No. 2 and the old administration building, just a short walk away.

CSU has increased the Uptown population by converting a few of its buildings into housing for some 450 students.

“We’re at a point where it’s no longer just, ‘Can we make downtown a very energetic and exciting place to be?’” says Swift. “Now the question is, ‘How can we maximize all of it?’”

## Metamorphosis

Some will tell you that Columbus is fast becoming a place where the “cultural creatives” who seem to drive much urban economic development like to hang out.

For the past two decades, developer Buddy Nelms has watched the transformation and helped create venues where it’s fostered. College students often frequent his bike shop, Ride On Bikes. Young entrepreneurs have planned new products in the Iron Bank Coffee Shop on Broadway and listened to music in The Loft, which includes not only a music venue, but also a recording studio that has drawn artists from around the world.

He’s ridden the ups and downs of the economy here as well, and he sees a resurgence in the march toward revitalization. He says there’s been something of a “turning point” in the past year or so. Where there were once three or four calls a month inquiring about space in a building, there are now that many in a day. Once again success is building on success.

“It feels like people are getting their work done here,” says Nelms. “We have staff of about 85 downtown, and they’re driving. Their eyes are wide open, and they’re reaching in and not waiting for people to fix it for them.”

Many locals like Nelms think whitewater will be the final piece of the puzzle that tips the scale.

If so, it will be one of a series of good decisions the city has made over the past few decades. Columbus is a city that has never been afraid to create the infrastructure it needed to be successful and has reaped the successes of today, according to Greater Columbus

Georgia Chamber of Commerce President & CEO Mike Gaymon.

“Here we believe in change by design, not by default,” he says.

In the past three decades, the community has passed SPLOSTs and successfully completed a couple of \$100-million fund-raising efforts. The need for a large pipe to handle drain water turned into the scenic RiverWalk that stretches along the entire length of the city’s waterfront. The city built stadiums and a softball field to host events during the 1996 Summer Olympic Games.

It also acquired land needed for a business park that helped lure NCR’s manufacturing plant here more recently.

“Work done during the ’80s and later is serving us well when you look at the diversity of business we now have,” says Gaymon.

When most of the rest of Georgia was turning thumbs down to a one-cent sales tax for transportation last summer, the Columbus region said yes. Over the next 10 years, the tax is expected to generate about \$600 million to fund transportation improvements. Those funds – most of which will be spent in the city – will enable interchange improvements on I-85 near Fort Benning.

This roadwork will open up access to the new Benning Technology Park for military contractors just inside the fort’s main gate. When it’s up and running, the park is expected to add almost 2,000 new jobs to the area.

## Seeking Parity

For Columbus Mayor Teresa Tomlinson, the big question these days is not just the thriving downtown, but what to do about those parts of the city that have not fared as well. She has been pushing a variety of tax and bonding measures designed to bring new business into some of the city’s poorest areas.

“To me, the next big thing for all cities is you have got to find a way to economically redevelop your blighted area, because land is

your most precious and finite [resource],” she explains. “If you’re going to remain competitive, you have to find a way to reuse that blighted land resource. If you can’t do that, you won’t be competitive in the future.”

With a consolidated city and county government, Columbus has been able to utilize urban service districts – in which the government could lower millage rates for a blighted area, lessening the property tax impact.

“We have just passed an ordinance, which allows council to adjust the millage rate downward significantly, virtually acting as a tax abatement,” Tomlinson says.

The lower rates are available to companies that bring jobs into areas with significant poverty, and they vary depending on the size of the project and number of jobs.

The city also won the right to ask voters to approve tax allocation districts (TADs). Development efforts could then be jumpstarted with funding from municipal bonds that would in turn be paid back with the higher tax revenues generated by the completed projects.

A prime candidate is the city’s storied Liberty Theatre District. This historically African American neighborhood is home to the Liberty Theatre, which once showcased music legends like Marian Anderson, Ella Fitzgerald, Lena Horne and Duke Ellington.

Another area on the city’s radar is Bibb City, home to the now closed Bibb Manufacturing Company mill. Once a thriving city in its own right, the area fell on hard times after the collapse of the textile industry. It has potential owing to its location on a bluff overlooking the river – one of the best views in the area, according to Tomlinson.

## Attracting Visitors

Whitewater will be taking its place among an array of tourist attractions that have made Columbus something of a destination.



The convention center has played host to big shows such as the Georgia Republican Convention and the Southern Baptists' state meeting.

All told, about 1.3 million visitors came to town in 2012. They spent some \$316 million and created 4,300 jobs. They also produced a savings of \$348 million in taxes for local citizens.

"From the leisure side, we've got a little bit of everything," says Peter Bow-den, president and CEO of the Columbus Georgia Convention and Visitors Bureau.

The city offers a wealth of museums. There's the school system-owned Columbus Museum, with its impressive collection of antique furniture and American art. The Coca-Cola Space Science Center houses an array of components from NASA, including original flight monitor panels along with an engine nozzle and wheels from the shuttle.

With Fort Benning nearby, military reunions are also big business. Many military and a considerable number of non-military visitors are trekking to the National Infantry Museum and Soldier Center. This \$100-million facility houses a vast collection of military artifacts, and exhibits represent the timespan from the Revolutionary War to the conflicts in Iraq.

History and the military's role are well represented. Considering that Columbus was home to the Confederate Navy Shipyard, it's a natural place for the National Civil War Naval Museum at Port Columbus.

Its exhibits tell the lesser-known story of the water war that was fought on rivers and along coastlines. Among the many mockups of famous ships from both sides, there are the startling remains of the CSS Jackson, one of the largest ironclads built in the South. Sitting dockside when Union cavalry captured the city in 1865, it was burned to the waterline to prevent any later use by Confederates. Consumed in flames, the ship drifted downriver for two weeks before finally sinking 30 miles south of Columbus. The ship was raised in 1961 by local citizens during the Civil War

Centennial.

"It's ironic that we have it now, because it was burned and sank," explains museum Executive Director Ken Johnston. "Most ships were disassembled and sold for scrap."

## Military Outlook

Amidst all the promise, local leaders have also become a little nervous about how federal budget cuts will affect Fort Benning. Word got out that at least some of the units could be on the chopping block. One study apparently recommended a reduction of 7,100 active duty and civilian personnel. Such a move could take a big chunk of the \$4.3 billion a year impact of the base.

"Fort Benning is a huge economic engine," says Gary Jones, the chamber's executive vice president for economic development and military affairs. "That \$4.3 billion is just based on salary and contracts."

In past years, the base has profited from closures elsewhere as units were shifted here. The next time, the area may not be quite so lucky.

"We know there will be cuts," says Becca Hardin, executive vice president of The Valley Partnership, a regional economic development agency that is part of the Greater Columbus Chamber. "We don't know how Fort Benning will be impacted. Nothing has been officially announced and confirmed. We will be very focused on keeping soldiers there and keeping civilians employed. If we see large cuts there, it's going to impact housing, retail and everything in our local economy. Fort Benning is something we watch very closely."

Whatever happens, it isn't likely to dampen the optimism that pervades this city. The glory days it once knew are here again.

*This article appears in the June 2013 issue of Georgia Trend*

# COLUMBUS: ROARING AHEAD

Connections, creativity and college kids

Karen Rosen



A New Era: Columbus Mayor Teresa Tomlinson

[www.beckystein.com](http://www.beckystein.com)

“Up” is the operative word in Columbus, and not just because of the new zip line that will whisk brave souls across the Chattahoochee later this year. A desolate area on a bluff overlooking the river is ripe for revitalization as a “creative village.” And Columbus is pitching an ambitious plan to increase the number of flights taking off from its airport with high-speed passenger rail service to Atlanta’s airport.

Factor in the city’s thriving downtown, and it’s fitting that Columbus has always called it “Uptown.”

These projects have something else in common: potential for connections. The 1,200-foot zip line will not only link Georgia to Alabama (at 40 mph), but will complement Columbus’ distinctive outdoor tourist attraction, the largest urban whitewater course in the world.

Mayor Teresa Tomlinson says that “with this new intensive recreational use of our river that had previously been dammed up for mills,” a new era has arrived “that is bringing this fresh look at Columbus.”

The redevelopment of City Village – a former mid-20th century mill town on 30 square blocks north of downtown – will tie Uptown and the Total System Services Inc. (TSYS) campus to the trendy Bibb Village neighborhood via the RiverWalk and the 2nd Avenue corridor.

“It will physically connect all of that investment in Uptown to this investment that’s been occurring naturally and through the private sector in Bibb Village,” Tomlinson says. “You’ll have this continuity of vibrancy and intown living.”

Meanwhile, high-speed rail, planned to begin in 2030 at a cost of \$3.9 billion (in 2030 dollars, with a 30 percent contingency) “is about connecting the economic resources of Columbus with Atlanta,” Tomlinson says.

She hopes to make Columbus a pilot project. “I actually am going to pitch to the Federal Railroad Administration that they need



to come to Columbus first because we're doable, we're the least expensive, we already have the right-of-way largely in hand and we are not on a shared rail so we don't have to fight with Norfolk Southern and CSX," Tomlinson says. "We're now at the forefront of all cities in Georgia to be the first city for high-speed passenger rail connection to Atlanta."

## Tourism Trends

Those on the zip line will settle for high-speed connection to Phenix City. Plans are to open by the end of the summer just south of the Cut Bait and Powerhouse rapids. A new splash pad with 32 jets is another new tourist attraction.

Richard Bishop, president and CEO of Uptown Columbus, says more than 16,000 people ran the rapids last year in the first whitewater season on the Chattahoochee.

"We only touched a small piece of the market in our metro area and just scratched the market in the Atlanta area," Bishop says. "We hope to get that number up to 25,000 or 30,000 this year."

By combining river activities with visits to the National Infantry Museum and Soldier Center, National Civil War Naval Museum at Port Columbus and the Coca-Cola Space Science Center, a trip to Columbus "really becomes an overnight stay," Bishop says. The ultimate goal is a multi-day visit.

Bishop says 11 new Uptown businesses – mostly restaurants – opened last year, and gross receipts for the entire area totaled about \$34 million.

He expects substantial growth this year now that a whitewater outpost on the Georgia side of the river opened in January. Last year, the only check-in area was on the Alabama side.

Columbus also offers numerous dry-land activities, such as running and biking on its trails and RiverWalk, which make it a destination for physically fit families.

The Convention and Visitors Bureau uses the slogan "Conquer the Outside" in its marketing, urging visitors to "plan your outdoor urban escape" in Columbus. A new app includes information about rafting, fishing, running, biking, geocaching and even birding. Lucky birders have already spotted the two bald eagles that live downtown.

The number of visitors increased from 1.3 million in 2012 to the 1.7 million last year.

"We think it's because the city keeps reinventing itself, keeps adding product," says Peter Bowden, president and CEO of the CVB. "It was rare that we walked into any meeting or gathering across the state or even in the Southeast that the conversation didn't start, 'Well, tell me about whitewater.'"

The bureau has been focusing more on social media and digital marketing to tell its story and will roll out a more interactive website this summer.

## Burgeoning Downtown

While Columbus' appeal has long been evident to those booking family and military reunions, it has found recent success selling downtown as a meeting campus. The convention center, RiverCenter for the Performing Arts, Civic Center and Springer Opera House are all within walking distance.

The Georgia Thespians, who have about 4,000 young participants, have felt at home for several years in a city showing an increasing commitment to the arts.

Columbus raised \$100 million to build the RiverCenter, then Columbus State University came up with another \$100 million to move its colleges of music, art, theater and communications to what is known as its RiverPark campus. In April, CSU opened art studios in the old Seaboard Depot.

The university's history, geography and astronomy programs are also based in Uptown, and CSU's footprint continues to grow.

At press time, President Tim Mescon was negotiating to buy the former Ledger-Enquirer building in hopes of moving the college of education and the health professions in the school of nursing to the 176,000-square-foot space. That would leave room on the main campus for an expansion of research activities and an honors college.

“We’re deeply involved in this whole gentrification of the riverfront area,” Mescon says. “We’ve got over 1 million square feet here in about a dozen different buildings and 500 student beds downtown, but the acquisition of the Ledger-Enquirer building would really be an exclamation point on our RiverPark campus.”

The move would give CSU, with an enrollment of 8,300, about 3,000 students downtown.

Shuttles take students back and forth to the main campus six miles away. “They’re only 20 minutes apart, but it’s two completely different lifestyles,” Mescon says. “No other university in our system has this kind of a live-work-play geography for our students on the banks of the Chattahoochee River. We think you get a unique urban experience here, but in a smaller city environment.”

While universities typically own their own housing, CSU partnered with a private developer to install students in a gorgeous three-story walkup that opened a little over a year ago.

“We said we can fill up any bed that’s built downtown,” Mescon says. “It filled up in like 15 minutes. “

Non-students are also vying for living space Uptown, including apartments and condominiums in renovated mills such as Eagle & Phenix, developed by the W.C. Bradley Co., and the Lofts at Swift Mill.

Pace Burt bought the old Swift Mill, once a large denim manufacturer, in 2007, and didn’t abandon the project after a massive fire destroyed 70 percent of it in 2011. However, Burt lost

his tax credits and incentives after the fire.

“The project was literally dead in the water in 2012,” Burt says. “We were really in a big mess. The state wanted to see these buildings renovated, but they’ve got guidelines, too, that they have to follow.”

Burt still had 300,000 square feet left over. He worked with a consultant to convince the state that the remaining structure had historical significance and received tax credits to rehabilitate the structure.

The first building opened Jan. 1, 2013, and has such artsy appeal, Burt says, that “people want to have receptions in the hallways.”

He also has 80,000 square feet of commercial space and is looking for the right tenant or tenants.

Meanwhile, Burt is putting 47 one-bedroom loft apartments in a second building that should open in August. There’s already a waiting list for the units with exposed brick and beams and 16-foot ceilings. “The only restriction on Swift Mill is historical, which is a no-brainer,” Burt says. “That’s why people want to be there. We’ve had a tremendous outpouring of support from community and residents.

“Infill is where it’s at now. Everybody wants to have walkability.”

That walkability would extend to the City Village project, which Tomlinson says “became the talk” of the Mayors’ Institute on City Design conference in the fall of 2012.

She envisions a neighborhood drawing “those individuals that creative industries are looking to hire. That’s a new sector we would like to get into in Columbus, which is everything from software design to architecture and the cultural arts.”

Features could include urban agriculture, innovation stations and very generous linear parks along the bluff for public space, outdoor concerts and festivals.





Not everyone wants to concede the entire living space to the creative industries. “The school board is involved,” Tomlinson says. “They’re saying, ‘Hey, can we have a teacher village?’”

The site of the historic Bibb Mill, which burned down in 2008, could be attractive for a national corporate headquarters.

It’s just another repurposing of land that once revolved around mills employing more than 30,000 people. That number has decreased to about 800.

### Growing Up

“The leaders way back 40 years ago said, ‘It’s important for us to diversify,’” says Mike Gaymon, president and CEO of the Greater Columbus Georgia Chamber of Commerce, “and today, we’re reaping a lot of the benefits from seeds that were planted many years ago.”

Technology-based companies such as Aflac and TSYS took root in Columbus, giving the city more mainframe computing capacity than the rest of Georgia combined, excluding the Atlanta region.

“The big opportunities that we see are the expansion of our existing companies here locally,” says Bill Murphy, who came from Ohio in early 2014 to become the chamber’s executive vice president for economic development. “Over the past 20 years, the community has really invested in making the community not just a great place to work or to live, but to also play.”

In 2013, the chamber and the Valley Partnership announced 3,330 jobs (including 895 retained jobs), a significant increase over 2012, when there were 1,297 (including 350 retained jobs).

This year got off to a rousing start when Blue Cross and Blue Shield of Georgia (BCBSGA) announced in late January that it would build a new facility to house nearly 2,000 employees currently in two smaller locations. The 200,000-plus-square-foot space is expected to open by next summer in the Muscogee Technology Park. The \$50-million investment comes on the heels

of two BCBSGA announcements in 2013 totaling more than 600 jobs.

The Kia Motors plant 40 miles to the north continues to bring in suppliers. Hyundai Dymos, which manufactures axles, manual transmissions and seats, will bring 350 new jobs and a capital investment of \$25 million. The company began hiring in January and had 1,200 applicants.

Pratt & Whitney is expanding into a 105,000-square-foot building in the Muscogee Technology Park, creating 45 jobs initially and the potential to double its space to 200,000 square feet this year.

About 400 jobs returned to the Hostess plant, which shut down in late 2012. The Columbus bakery reopened last summer under new ownership, bringing Twinkies back to the shelves, while other former Hostess snack makers remained closed.

“One of the reasons that they opened it is because of the competitive package that was put on the table from our development authority and our city, and the work of our chamber helped to coordinate all that,” Gaymon says.

Now he’d like to bring a medical college to Columbus, whose population of about 200,000 makes it neck-and-neck with Augusta for the title of the state’s second-largest city.

A partnership with Mercer University – in which third- and fourth-year medical students train at two local hospitals – is in its third year. However, Gaymon wants a permanent presence, citing a national study that claims communities with a medical college reap 2.3 dollars for every dollar spent.

To that end, he’s looking at building sites, “so that we can recruit Mercer Medical College here like we recruited NCR.”

The chamber didn’t bring Fort Benning to the region, but it’s doing everything in its power to give the Army installation what it needs – especially in light of U.S. Army budget uncertainty. Fort Benning has 42,000 employees and had an economic impact last

year of \$5.97 billion.

“We’re very comfortable that Fort Benning will be around for a very, very long time,” says Gary Jones, the chambers’ executive vice president for economic development and military affairs. “What we want to do is help make sure that we can prepare this region so it does not preclude growth opportunities at Fort Benning.

“We still see Fort Benning as a growth industry.”

However, the Army has revealed it will get smaller. Jones expects the fort’s economic impact to decrease due to the combination of a Department of Defense drawdown, sequestration and Defense Base Closure and Realignment (BRAC).

“But we’re saying that, ‘Hey, even if that impacts the region a half billion dollars, you’re still dealing with an entity that brings in \$5.4 or \$5.5 billion and that’s serious business,’” he says.

Fundraising has begun on the \$65-million National Armor and Cavalry Museum that will eventually be another destination on the RiverWalk linking Fort Benning with Uptown.

“The Chattahoochee used to be called the old brown rope that ties us together,” Jones says. “Now the water is just clear, and that’s because it’s back following its own path and the rapid water has washed the silt away. [If] you stand on the banks, you can look down and on the bottom see the fish swimming around.”

Or look up and see more of what Columbus has to offer.

*This article appears in the June 2014 issue of Georgia Trend*







# CASE STUDY GREENVILLE, SC



## How Greenville, South Carolina, Brought Downtown Back: A Case Study in 30 Years of Successful Public/Private Collaboration

Real Estate Review, Vol. 37, No. 1, Spring 2008

Nancy P. Whitworth\* and Mary Douglas Neal\*\*

*\* Nancy Whitworth is the Director of the City of Greenville Economic Development Department and has over 22 years experience in the field of economic development. She is experienced in facilitating private development through negotiated participation by the city for major commercial developments in downtown and across the city.*

*\*\* Mary Douglas Neal (now Mary Douglas Hirsch) is the Downtown Development Manager in the Economic Development Department with the City of Greenville. She is directly responsible for working on a day-to-day basis with business owners and developers to promote a viable downtown district.*

Having a strong urban core is a top priority for the City of Greenville, South Carolina. For the past 30 years, the city has teamed with the private sector to create unique development partnerships, stimulating a major revitalization of the central business district that has had far-reaching impacts.

With the most impressive strides being made over the last 10 years, Greenville's downtown has gone from abandoned warehouses and empty storefronts to having a thriving central business district, with up-scale restaurants, high-end residential condos and lofts, numerous events, and major new mixed-use developments, consisting of office, residential, hotel, and retail uses, scattered throughout downtown. The sustained momentum is, stunning for a small southern city of just under 60,000 residents.

Greenville's Economic Development Department has played an integral role in the downtown development activity. Focusing on key anchor developments, unique natural assets, a multitude of cultural amenities and attractions, and steady residential growth, the city has utilized its economic and physical strengths, and those of the region, as critical components of the revitalization process. Both local government and private enterprise understand the development process, realizing that a partnership based on mutual respect between both private and public sectors is often the best approach to achieve successful developments.



## LOOKING BACK

Greenville, South Carolina is nestled in the foothills of the Appalachian Mountains, midway between Atlanta, Georgia, and Charlotte, North Carolina. The region is home to many national and international corporations such as Michelin North America, General Electric, and BMW. Greenville's industrial development has consistently been strong and growth has been sustained, but not all of Greenville followed this trend. As people moved away from the central city, a rapid decline ensued. Once the unquestioned retail and business center of the area, Greenville's downtown languished in the 1960s and 1970s as shopping centers lured the major retailers to the suburbs, and downtown was left with countless vacant buildings and no people.

Greenville faced what other cities faced—a dying downtown in the midst of a growing region. To meet the challenge, Greenville set out to remake Main Street and to create an atmosphere that would be conducive to office and residential uses, specialty retailing, entertainment, and the arts. Downtown's renaissance has been an evolutionary process marked with significant achievements, and some missteps, over the past 30 years.

## GREENVILLE'S APPROACH

Greenville assessed what it had and realized something dramatic needed to happen. With an unappealing and uninviting downtown with no particularly attractive buildings, downtown had to be repositioned to provide a distinctive environment and unique atmosphere.

As Greenville took steps to re-establish its downtown, the city invested strategically in properties, following a plan to develop major anchors in the downtown area and filling in the areas in between with deliberately chosen private sector investors. Greenville took advantage of its small downtown

and expanded the activity centers in a logical and connected progression based on a formula which included retail, office, residential, entertainment, and family needs.

No simple formula for success exists. Every downtown is different. In fact, it is important to focus on differentiating one downtown from another, because it is the individual character of a product that commands the highest value in the market place. Greenville's strategy includes a marketing line that also reflects the city's approach to revitalizing the downtown: "Downtown is Everybody's Neighborhood."

The main street streetscape design, completed in 1979, marked the first physical improvement of Greenville's downtown. Although the trend at the time was to emulate the new shopping malls, Greenville chose not to shut down its main street and rather to combine the best of vehicular and pedestrian design.

What set Greenville apart in the early days, was its commitment and understanding that there would have to be a successful alliance of public and private investment. Greenville understood, long before the words public private partnerships became common, that it was necessary for the public sector to step forward to provide the impetus for private investment to occur. Greenville adopted a plan followed by a sustained commitment that led to and continues to support a model downtown.

Greenville leaders focused on a master plan that outlined a strategy for implementation that has been modified and adapted over the years to reflect changing market conditions. There was a willingness to try new approaches, take risks, make mistakes, and learn from the successes and the failures. But it was not always easy and was never without critics.

The year 1977 was a significant milestone. The City Council, led by Mayor Max Helier, along with a contingent of philanthropic community leaders, took steps to begin the remaking of downtown. As was reported in the Greenville Piedmont, "Council charged full speed ahead despite the cries of persistent doubters who believe that all the gold at Fort Knox would not save downtown?" And the rest is history. Today, Greenville has transformed from an aging mill town to one of the best downtowns in America recognized for its boutiques, art galleries, restaurants, vibrant entertainment scene, and buzzing night life. What, in retrospect, have been the key factors in this remarkable turnaround.

## FOCUS ON DESIGN AND IMAGE

Main Street Greenville was remade to create a pedestrian orientation without sacrificing vehicular traffic. Greenville was not blessed with an attractive streetscape; instead, quite the opposite. A major thoroughfare, Main Street had overhead power lines, four lanes of moving traffic, parallel parking, and little landscaping. When the department stores and shops lined the streets, the lack of physical amenities did not seem to matter—Greenville had people and activity. When the stores left, so did the people, and the streets and sidewalks suddenly turned into vast wastelands. It was often said that you could shoot off a cannon on Main Street at night and not hit a soul! This was not an image that Greenville wanted to have.

Something had to be done, and a plan was born. Designed by Lawrence Halprin and Associates, the streetscape plan condensed the existing Main Street from four lanes down to two lanes of vehicular traffic with free angled parking. The vast expanse of bare pavement made way for trees. The trees, which are now the signature element of Main Street, made it appealing to pedestrians and also covered up some of the unattractive and vacant buildings. Sidewalks were made extra-wide to provide a fes-

tive atmosphere and to encourage outside dining and other sidewalk activity. And that was just the beginning; setting the stage for future development. Greenville now had an identity as a tree-lined street with a welcoming canopy of lush green trees that provided cool shady spots for outdoor dining during the warm weather, an ideal that is characteristic of South Carolina.

Further planning laid the groundwork for investments in plazas and public spaces. Planning focused on creating and highlighting one of the most spectacular features of Greenville's downtown—Falls Park, which features a 355-foot award winning suspension bridge overlooking a 60-foot waterfall, five stories below. Some cities work to maintain their unique identity; Greenville had to work to uncover its uniqueness. Long ago, the waterfall had been covered with a state owned, federally funded bridge, which totally obscured the view of the falls and intruded upon the park environment.

When the decision was made in early 2001 “to remove the bridge and free the falls,” the skeptics surfaced again. Greenville's Mayor Knox White and the City Council led the public/private effort to remove the bridge and reclaim the heart of the city. The park now not only boasts the bridge, but 20 acres of gardens and amphitheaters for concerts and the summer-long upstate Shakespeare the Park performances. The park has become the city's signature public space providing a quiet respite from the urban environment and a gathering spot for people of all ages.







## USE CENTRALLY LOCATED INVESTMENTS AS CATALYSTS

Developing anchor projects, through creative public/private partnerships is one approach used by Greenville to spur redevelopment activity in downtown. An anchor can signal a rallying point for the community and serve as the catalyst for future complementary development. Combining the efforts of the public and private sectors can help ensure its success.

**Table I**  
**Summary of Downtown Development Projects**

| Project                                  | Year      | Investment Levels |                |                | Project Components  |
|--|-----------|-------------------|----------------|----------------|---|
|  |           | Completed         | Public         | Private        |   |
| Greenville Commons                       | 1982      | \$10 million      | \$24 million   | \$34 million   | 350 room Hyatt Regency Hotel; 43,000 SF meeting space; Restaurant; 92,000 SF office space; 832 space parking garage   |
| The Peace Center for the Performing Arts | 1991      | \$13.9 million    | \$28.5 million | \$42.4 million | 2,100 seat concert hall; 400 seat theater; 2,000 seat outdoor amphitheater; 28,500 SF office building; Restaurant; Park and public space; Cabaret theater; Former coach factory meeting facility  |
| West End Market                          | 1995      | \$4.16 million    | N/A            | \$4.16 million | 35,000 SF of retail/restaurant space; 10,000 SF of office space   |
| Poinsett Plaza/Hotel                     | 1999/2000 | \$15.1 million    | \$39 million   | \$54.1 million | 220,000 SF office space; 4 residential penthouses; 204 room Westin Poinsett Hotel; Streetscape and park improvements; An 843-space Parking garage   |
| West End Baseball Stadium/Field House    | 2006      | \$8.5 million     | \$20.7 million | \$29.2 million | Stadium with 4,500 fixed seats pavilion; Playground; Green Monster media board modeled after Fenway Park; Mixed-use building with 40 residential condos and 55,000 SF   |
| RiverPlace                               | 2005      | \$13.5 million    | \$37 million   | \$50.5 million | Two residential condo buildings with 46 total units; 115 room Hampton inn and Suites Hotel; 87,000 SF office building; 5,000 SF artist studio spaces; 285 space parking garage; Streetscape and riverwalk improvements and an interactive water feature |
| Falls Park and Liberty Bridge            | 2004      | \$13 million      | \$3.4 million  | \$16.4 million | Bridge demolition; Landscape and irrigation; Stream restoration; New pedestrian bridge; Hardscape and buildings and design and construction management  |





### **GREENVILLE COMMONS**

Greenville's first anchor and first major public/private partnership was the Greenville Commons, which incorporated a Hyatt Regency Hotel, \*mentation center, office complex, and parking garage. A dedicated group of Greenville businessmen put their investment at risk to ensure that this project happened. The city purchased the land, built the convention center and parking garage and leased the air rights for the hotel and office building. The hotel atrium was considered a city park.

The success of the Commons was not simply the financial success of the project, although the Hyatt is still operating, today, but rather the spillover impact of the new office buildings which were constructed nearby resulting from the renewed interest in downtown development. It also began a new way of doing business for the city as the public and private sectors worked together to achieve the dream. The public sector provides the spark plug, but it is the private sector that is the engine in Greenville. However, neither works without the other.

Continuing on with its plans and focusing on the success of public/private partnerships, Greenville steadily moved in a logical progression to develop

further downtown anchors, ensuring that they were strategically located in order to maximize the potential impact.

### **THE PEACE CENTER FOR THE PERFORMING ARTS**

The Peace Center for the Performing Arts stabilized a less than desirable part of town and linked downtown to a hidden asset—the river, waterfall, and park. The center included the addition of major facilities, renovated several historic structures into productive space, and gave people a reason to come downtown at night and on weekends. The Peace Center is a perfect example of the beauty of a public/private partnership, with a lead gift given by a prominent local family, and the entire community lending support in a myriad of ways. For its part, the city acquired the property (primarily through tax increment financing) and provided the landscaping and amenities. Eminent domain, typically used sparingly in Greenville, was necessary to secure some of the property.

### **WEST END MARKET**

Greenville's next major anchor required a different approach. The historic West End of downtown was blighted, yet strategically connected. Even after completing streetscape improvements and provid-

ing low interest loans, the private sector was reluctant to invest. With a private donation of neglected, historic buildings, the city, led by Mayor Bill Workman and City Council, took the risk of developing the West End Market, a major 45,000 square foot destination for residents and visitors alike. Recognizing that private investments would not be taking the lead in developing in this location, the city assumed the developer role, along with the attendant financial and market risk, to create a facility with office, retail, restaurants, artisans, and a traditional farmer's market, all in a festive and park-like setting.

The financing structure required the pooling of a number of sources: tax increment financing, a HUD Section 108 loan, grants, city general fund dollars, and even the sale of personalized bricks. The city took on a significant risk but learned first hand the private side of a deal. The West End Market was sold in 2005, yielding a net profit to the city to invest in other projects.

The establishment of the Market led to an arts and entertainment district of restaurants, theaters, and the Governors School for the Arts, a year round residential school for the arts and humanities attracting high school students from across the state.





## POINSETT PLAZA HOTEL

Sometimes mixed-use developments include multiple buildings and developers all within the same project. The city was working with the owner of a vacant and neglected historic hotel when it became apparent that a parking structure, required to support the hotel, should be sized to accommodate other potential developments as well. The city approached a local bank, then housed in an adjoining historic building, to inquire as to whether the need for new space might become imminent. A developer was identified, who was in the vacant and neglected hotel, and the result was the Westin Poinsett Hotel, a renovated 204 room hotel. Along with the renovated hotel came a new 220,000 square-foot office building with residential penthouses and 44 condominium units, which were the result of the renovation of a vacant educational wing of a nearby church.

Tax increment financing was again used, this time to construct the parking garage with a design that incorporated the architectural elements of each development (the sides of the garage match the building on the corresponding side—one side has brick and the other concrete). Even though the city's financial participation was necessary, perhaps more important was its role in bringing the various private partners together and coordinating the various contractors with tight schedules and space.

## WEST END BASEBALL STADIUM

More recently, a public/private partnership resulted in an award-winning new baseball stadium in the West End, which was designed to feel as if it were a long-standing community facility. The city provided development ready land and leased the property to the owners of a new team, the Greenville Drive (an affiliate of the Boston Red Sox), who were interested in locating in Greenville.

Constructed from old brick salvaged from demolished textile mills, the Drive now play in a neo-traditional designed stadium with a left-field wall reminiscent of Fenway Park's Green Monster. A newly constructed building including offices, restaurants, retail, and residential condominiums lines one side of the baseball stadium, and other restaurants and offices have located in nearby renovated space. Another great example of a public/private partnership, funding for the project came primarily from tax increment financing, sale proceeds from the West End Market, hospitality finds, and storm water and sewer funds. The team owners constructed the stadium using all future stadium and ticket revenues.





## RIVERPLACE

RiverPlace is the latest example of a major public/private partnership. A collection of buildings along the Reedy River with office buildings, residential condos, restaurants, artist studio spaces, and an interactive water feature, this complicated public/private partnership required layers of ownership over different elevations and a marriage of public and private interests.

For many years the community had turned its back on the Reedy River riverfront. Upstream industries had been allowed to dump industrial chemicals into the river, causing major pollution issues and contaminating the river. The challenges faced to develop this area were many.

The revitalization of the adjacent Falls Park provided the impetus to further the reclamation of the riverfront. For over 25 years, a 10-acre tract had been privately assembled with plans for a mixed-use development. The owners wanted to wait until the market was ripe for a significant development. With the negotiations occurring between the city and private developers, the time had come to revitalize this area—which sits at the literal heart of downtown. The resulting development was environmentally sensitive to the sites and established a design standard for the community. The city constructed underground parking with private development constructed above. Public walkways and plazas link to the park. Parking spaces along the riverfront were designed for artist studio spaces that are leased for the cost of a parking space. Eminent domain was required to assemble some of the public walkways.





### **ATTEND TO THE DETAILS, DETAILS DO MATTER**

Downtowns are not just about the big projects and planting of trees. As in any major development, attention to the details and maintaining the value of the investment is critical. Attractive landscaping, seating, lighting, and sculpture alone will not make things happen, but it does provide a backdrop for the important elements and gives a sense of place and identity to set the stage for a transformation. As then Mayor Max Heller was quoted at the streetscape groundbreaking in 1978, “We are delighted to make the beginning of the new downtown. It will give the core of our city a much more beautiful appearance and will be its reflection of the whole area.” The physical environment should be designed and programmed to encourage its use and reinforce a sense of place with a focus always on people.

In the years since 1978, Greenville has focused its attention on a number of details in order to ensure not only that people come to downtown but that

private investment comes downtown as well.

### **CLEAN AND SAFE**

Downtown crews provide daily clean up. Sidewalks and streets are routinely washed. Seasonal plantings provide color. Police officers or fQot and bike patrol provide an enhanced level of service in downtown.

### **SIGNAGE/WAYFINDING**

Attractive, coordinated and easy-to-read signage provides pedestrians with directional wayfinding for downtown destinations. “More to enjoy” signs on Main Street direct visitors to retail and restaurants on side streets.

### **EVENTS**

Downtown averages over 250 event days per year. Events include something for everyone, from singles to families, senior citizens to college students: weekly concerts, art festivals, moonlight movies, theatrical performances, music, festivals, holiday celebrations, and parades. Downtown events achieve a number of objectives including drawing people

into downtown for entertainment, providing them with reason to dine in one of downtown’s eighty plus restaurants and renewing their enthusiasm for all that the city has to offer.

### **OUTDOOR DINING**

Downtown Greenville’s original streetscape design from the 1970s narrowed Main Street and enlarged the sidewalks. The wide sidewalks provide ample space for downtown restaurants to add tables and chairs for outdoor dining and the generation of additional revenues for these restaurants. The sidewalk cafes create a festive atmosphere for people watching.

### **PUBLIC ART**

Public art fills downtown. Whether a statue of a famous Greenville native, a juried sculpture, art on construction fencing, nine bronze mice scattered throughout Main Street with clues, quotes in the sidewalk, bells in the trees, or sidewalk performers, there is something for everyone, further enhancing downtown’s personality.





## **SHARING THE LESSONS LEARNED IN GREENVILLE**

### **BUILD ANCHORS**

Anchors are not a guarantee, but they set the tone for future development and the standard and direction for what can follow. Anchors should be strategically located to obtain the most impact and should be well linked with high-quality pedestrian corridors.

### **CREATE A CRITICAL MASS**

To be economically self-sustaining, a downtown must attract people not only to live and work there, but tourists must bring their business as well. Mixed-use developments help to provide the variety and stability for tourism and office/residential needs.

### **BE AN ENTREPRENEUR**

The public sector needs to think and act entrepreneurially, understand and appreciate the inherent risks of private development, and be willing to assume well-calculated risks.

## **BRING VALUE TO THE PRIVATE DEVELOPMENT**

The public sector's value to the private development is not just monetary. There are other ways to provide value including the following ideas:

### **PROVIDE EXPEDITED REVIEWS**

assist in scheduling and staging of construction, assign effective city staff to function as part of the development team to serve as problem solvers.

### **COMMIT IN WRITING**

Agreements are essential. Expectations and responsibilities of each partner should be clearly defined. The private sector must understand the transparency of the public process and be patient. Time commitments must be realistic. The city has an extensive history of writing development agreements that stipulate the duties and obligations of each sector. Both sides often return again and again to these agreements for clarification as issues or questions arise.

## **INCLUDE RESIDENTIAL USES**

The City of Greenville realizes the importance of ensuring that downtown is everyone's neighborhood. Providing downtown residences is essential. It will never be enough to just get people to visit and work downtown; people need to actually live downtown to support retail, restaurants, and cultural venues and, most importantly, to create an active street life. The initial focus of residential construction was mainly apartments and condos above the shops lining Main Street. Now, major residential components are included in most of the mixed-use developments throughout downtown. Many of the residential units have been sold by auction. Over the past five to seven years, approximately 500 residential units have been constructed. Currently, there are an additional 500 units under construction and nearly one hundred more planned.





It is important to realize a balancing act is needed in a central business district as the introduction of residential areas into a vibrant and lively downtown can often result in conflict. Balancing the entertainment with residential needs is tricky. Of late, the city, through its development agreements with private developers, is requiring an acknowledgement that some areas of the downtown will include entertainment venues so as to head off potential future conflicts.

With the growth of new development activity, land values in the downtown area have increased, causing some properties to be financially out of reach of a large segment of the population. The city is addressing the affordability of downtown residential growth in a variety of ways, including the establishment of a Housing Trust Fund, land writedowns for new affordable and mixed income housing, downpayment assistance to qualified buyers, contribution to infrastructure to reduce development costs, partnerships with non-profit and civic-minded developers and employment training programs designed to raise income levels.

### SUSTAINED PUBLIC COMMITMENT & INVESTMENT

Greenville's elected officials made tough decisions along the way. It was not always easy; each project presented unique challenges. However, the city's leadership persevered. They studied the issues, took calculated risks, and invested in the downtown, understanding that the returns may not come until much later. The visionary, effective and persistent public policy and investment has allowed Greenville to realize its potential.

The Greenville community supported the revitalization, which was incredibly important and provided the elected officials a safety net. The leadership also demonstrated to the community that due to state annexation laws limiting how the corporate boundary could expand, its economic survival was going to be dependent on growing from within. This focus proved fortuitous. Not only has the downtown prospered, but so has the region. It also allowed Greenville's Mayor Knox White and City Council to focus on the revitalization of inner city neighborhoods adjacent to downtown.

### SUMMARY

Greenville has focused on creating a place that is authentic, sustainable, and first and foremost for people. The city has elected to invest in public spaces, parking facilities, and critical infrastructure required for quality private development. The city's mantra has been public/private partnerships, but it has not shied away from solely taking on a development project in a blighted area if necessary to draw private developers out of their comfort zone. The desire to create an award-winning city is not just about pride; it is also about creating jobs. The success of downtown is a selling tool for recruiting and keeping quality employers, whether in downtown or within the region.

The success of Main Street and downtown Greenville is a result of nearly 30 years of hard work and strong partnerships between the public and private sectors. Together, the city along with the community has been able to realize the potential, capitalize on Greenville's uniqueness, and revitalize downtown. While the heart of the city is strong, Greenville must now focus efforts to build beyond Main Street. The city must create gateways into downtown that are aesthetically appealing and consistent with the area. As the city undertakes these new challenges, Greenvillians look forward to renewing partnerships and creating new ones.

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# CASE STUDY SAVANNAH, GA

Founded in 1733, Savannah is the oldest city in the State of Georgia and served as the original capital of the British Province of Georgia and the State of Georgia. Savannah has always prospered because of its active port, playing major roles in the American Revolution and the Civil War. Savannah and Charleston were two of the few cities not destroyed by General Sherman during the Civil War. As a result, many of the original buildings, homes and squares designed by James Oglethorpe remain intact. In fact, Savannah's downtown area, which includes the Savannah Historic District, the Savannah Victorian Historic District, and 22 parklike squares, is one of the largest National Historic Landmark Districts in the United States.

Savannah's port has always been a mainstay of the city's economy. In the early years of the United States, goods produced in the New World had to pass through Atlantic ports such as Savannah's before they could be shipped to England. From 2009-2014, Savannah was one of North America's largest ports for shipping container traffic.

Today, the Port of Savannah, manufacturing, the military, and the tourism industry are Savannah's four major economic drivers. In 2006, the Savannah Area Convention & Visitors Bureau reported over 6.85 million visitors to the city during the year. By 2011, the Bureau reported that the number of visitors the city attracted increased to 12.1 million. Lodging, dining, entertainment, and visitor-related transportation account for over \$2 billion in visitors' spending per year and employ over 17,000.

Several key factors have led to Savannah's success as a tourist destination: substantial investment on cultural and performing arts programs and facilities (and the events that utilize them), public investment in catalyst venues such as the Savannah International Trade and Convention Center and the soon to be developed Savannah Arena, and significant growth in the development of lodging properties including large nationally market hotels, bed and breakfast inns and the opening of boutique inns located in historic building. Possibly the most impactful development in the transformation in Savannah was the creation of the Savannah College of Art and Design (SCAD).





## ARTS and CULTURE

Beyond its architectural significance as being the nation's largest, historically restored urban area, the city of Savannah has a rich and growing performing arts scene, offering cultural events throughout the year. The City actively promotes hundreds of events that attract large and diverse crowds to the region throughout the year. Some of these annual festivals include:

- **The Savannah Book Festival** – an annual book fair held on Presidents' Day weekend in the vicinity of historic Telfair and Wright squares, includes free presentations by more than 35 contemporary authors. Special events with featured writers are offered at nominal cost throughout the year.
- **Flannery O'Connor Childhood Home** – a museum house dedicated to the work and life of the acclaimed fiction writer Flannery O'Connor, who was born in Savannah. In addition to its museum, the house offers literary programming, including the annual Ursrey Lecture honoring American fiction writers.
- **The Coastal Jazz Association** – presents a variety of jazz performances throughout the year in addition to hosting the annual Savannah Jazz Festival.
- **Savannah Music Festival** – an annual music festival of diverse artists which is Georgia's largest musical arts festival and is nationally recognized as one of the best music festivals in the world.
- **Muse Arts Warehouse** – founded in 2010, Muse Arts Warehouse is a nonprofit organization committed to community-building through the arts by providing a venue that is available, affordable, and accessible to Savannah's individual artists, arts organizations and the public.
- **Savannah Children's Theatre** – a non-profit, year-round drama theater company geared toward

offering elementary through high school students (and adults) opportunities for participation in dramatic and musical productions.

- **Savannah Community Theatre** – a full theater season with a diverse programming schedule, featuring some of Savannah's finest actors in an intimate, three-quarter-round space.
- **The Savannah Theatre** – Savannah's only fully professional resident theater, producing music revues with live singers, dancers and the most rockin' band in town. Performances happen year-round, with several different titles and a holiday show.
- **Little Theatre of Savannah** – founded in 1950, The Little Theatre of Savannah, Inc., is a non-profit, volunteer-based community organization dedicated to the celebration of the theater arts. Recognizing the unique social value, expressive fulfillment and opportunity for personal growth that theater provides its participants, the Little Theatre of Savannah invites all members of the community to participate both on- and off-stage.
- **Lucas Theatre for the Arts** – founded in December 1921, the Lucas Theatre is one of several theaters owned by the Savannah College of Art and Design. It hosts the annual Savannah Film Festival.
- **Trustees Theater** – once known as the Weis Theater, which opened February 14, 1946, this theater reopened as the Trustees Theater on May 9, 1998, and hosts a variety of performances and concerts sponsored by the Savannah College of Art and Design. SCAD also owns the building.



## CATALYST VENUES

### ***SAVANNAH INTERNATIONAL TRADE AND CONVENTION CENTER***

Opened in the late 1990's, the Center is located on the Savannah River directly across from Historic River Street. The 330,000 square foot venue features over 100,000 net square feet of "Class A" convention space and the region's largest ballroom at 30,000 sq. ft. A 300 room Westin Hotel and Spa is located adjacent to the venue. Water taxis help connect attendees to historic Savannah. The opening of the Center has allowed Savannah to actively pursue and host large numbers of conventioners and meeting attendees through the entire year – helping to generate yearlong tourism business.

### ***NEW SAVANNAH AND EVENTS CENTER***

In 2013, voters approved a Special Purpose Local Option Sales Tax (SPLOST) increase to raise \$130 million for the development of a new 10,000 seat events venue adjacent to downtown. Planning and development for this venue are now underway. The goals of this venue are to increase yearlong tourism, provide improved quality of life to residents and generate new economic impact.

### ***SAVANNAH COLLEGE OF ARTS and DESIGN (SCAD)***

Probably the most transformational dynamic in Savannah's renaissance is the creation and development of the Savannah College of Art and Design. Founded in 1978 with 71 students and 7 faculty members, SCAD now has over 11, 000 students on multiple campuses around the world. Over 9,000 of those students study at the Savannah campus. Most of the buildings which house college functions are structures which were largely dormant and in disrepair before SCAD purchased them. Downtown Savannah now features dozens of buildings which have been fully renovated and house classrooms, residences, galleries and other university functions.









SCAD's efforts to work with the city of Savannah to preserve its architectural heritage include restoring buildings for use as college facilities, for which it has been recognized by the American Institute of Architects, the National Trust for Historic Preservation, the Historic Savannah Foundation and the Victorian Society of America. The college campus includes 67 buildings throughout the grid-and-park system of downtown Savannah. Many buildings are on the famous 21 squares of the old town, which are laden with monuments, live oaks and a Southern-Gothic feel.

The college's first academic building was the Savannah Volunteer Guard Armory, which was purchased and renovated in 1978-79. Built in 1892, the Romanesque Revival red brick structure is included on the National Register of Historic Places. Originally named Preston Hall, the building was renamed Potter Hall in honor of co-founders May and Paul Potter. SCAD soon expanded rapidly, acquiring buildings in Savannah's downtown historic and Victorian districts, restoring old and often derelict buildings that had exhausted their original functions.

The university operates numerous Savannah galleries, notably Gutstein Gallery, Pei Ling Chan Gallery, Pinnacle Gallery and La Galerie Bleue.

The college holds numerous lectures, performanc-

es and film screenings at two historic theaters it owns, the Trustees Theater and the Lucas Theatre for the Arts. These theaters also are used once a year for the Savannah Film Festival in late October/early November. Past guests of the festival include Roger Ebert, Peter O'Toole, Tommy Lee Jones, Norman Jewison, Ellen Burstyn, Sir Ian McKellen, Oliver Stone, Liam Neeson, James Franco, Sydney Lumet, Miloš Forman, Michael Douglas, Woody Harrelson, John Goodman, Claire Danes, James Gandolfini, and many others.[23] With average attendance more than 40,000, the event includes a week of lectures, workshops and screenings of student and professional films.

Each April, SCAD hosts the Sidewalk Arts Festival in downtown Forsyth Park. The festival consists primarily of the chalk-drawing competition, which is divided into group and individual categories of students, alumni and prospective students. Similar is the Sand Arts Festival. This sand festival is held every spring on the beaches of nearby Tybee Island. Contestants can work alone or in groups of up to four people. The competition is divided into sand relief, sand sculpture, sand castle and wind sculpture divisions.

One of the College's most notable contributions to Savannah's economy is the SCAD Museum of Art.

The SCAD Museum of Art was founded in 2002 and originally was known as the Earle W. Newton Center for British American Studies.

The museum's collection of more than 4,500 pieces includes works of haute couture, drawings, painting, sculpture, photography, prints and more.

The SCAD Museum of Art is a teaching museum, serving Savannah College of Art and Design students and as well as members of the community and other visitors. A focal point is the Walter O. Evans Center for African American Studies, a multidisciplinary center for the study, understanding and appreciation of African American culture, art and literature. It is complemented by the new André Leon Talley Gallery, named for the Vogue contributing editor and SCAD Board of Trustees member.

On Oct. 29, 2011 the SCAD Museum opened its doors to a new era, unveiling the most extensive rehabilitation project the university has undertaken since its inception. The revitalized museum features new galleries and classrooms, a 250-seat theater, a terrace and outdoor projection screen, a conservation studio, a museum café, as well as a 12-foot-long orientation touch table. An 86-foot tall steel and glass lantern welcomes visitors and elegantly redefines the Savannah city skyline.





Vic's  
ON THE RIVER  
Restaurant & Bar

JE EBEL

Vic's  
Coffeehouse

THE RIVER  
GRILL

NELLIE'S  
NOOK

COFFEE  
MOUSE

Vic's  
Coffeehouse  
The one BEST  
thing in town





## SAVANNAH'S SURGING DOWNTOWN DEFIES DOWNTOWN

AJC.com, Sept. 30, 2012

Greg Bluestein

SAVANNAH — A city center that Atlanta and plenty of other cities dream about is the reality here.

Downtown Savannah teems with tourists and college students stroll past coffeehouses and restaurants in an eminently walkable urban environment. Chocolate shops sit side-by-side with art galleries, bawdy bars and boutique stores, creating the type of seamless mixed-use environment that developers dream of manufacturing.

Though long been known for walkability, downtown Savannah wasn't always this way. Sections were plagued with empty storefronts and lagging foot traffic just a decade ago. A fresh influx of tourists, a renewed focus on the "creative class" and Savannah College of Art & Design's unorthodox growth strategy have led to a downtown renaissance.

Atlanta certainly doesn't have the waterfront lure or historic charm of its older cousin. But the importance of a pedestrian-friendly downtown and Savannah's careful cultivation of a vibe that appeals to a wide swath of residents and tourists may hold lessons.

One of the biggest contributors has been SCAD, the arts school that's lured thousands of affluent students from across the nation to Savannah's streets.

Rather than focusing growth around a central hub, SCAD has made its mark by buying a scattering of aging or abandoned buildings across town, rescuing several historic sites that were vacant or in disrepair. The result is a disconnected campus that still manages to feel unified, spreading youth and energy across the city.

"The SCAD phenomenon in Savannah points to the future of urban revitalization. We're seeing nationally this great return to cities, and Savannah really is a living laboratory," said Christian Sottile, an urban designer who is dean of the school's Building Arts program. "It's more relevant now than ever before as we turn our attention to sustainability to make cities less dependent on cars."

The school's model, like those of some other urban universities, illustrates how a centralized campus isn't always necessary to foster cohesion and identity. The thousands of college students spread across Savannah's streets take care of that. The college-town vibe will only grow as Atlanta's John Marshall Law School converts a mammoth hospital in Savannah to house its local branch.

Atlanta city officials hope for a similar effect as Georgia State University continues to expand in downtown Atlanta. The school has scooped up properties across a swath of downtown, including the recent purchase of the Atlanta Life Financial Group building that gives it a new foothold on Auburn Avenue.

While Savannah's 12 million annual tourists pales in comparison to the 37 million visitors Atlanta estimates it attracts each year, the industry's growth there has had a profound and undeniable impact. Savannah's tourism draw differs, too, since many of the visitors come in strictly for vacations as opposed to conventions, sporting events and other gatherings.



The number of hotel rooms in Savannah has swelled by 4,000 in the last decade, and the surge of travelers has buoyed restaurants and amenities a town of Savannah's size couldn't otherwise support. The struggling economy has played a part, making a domestic destination like Savannah more attractive.

So has the city's packed calendar of activities and heavy policing.

"As soon as tourists don't feel safe, they don't come anymore," said Brandt Herndon of the Savannah Department of Economic Development. "The economy downtown hasn't really suffered, thanks in part to tourism and the influx of visitors it brings."

Savannah hasn't been immune from growing pains. Graffiti mars some buildings and alleys. Construction and roadwork makes navigating some streets difficult, and parking can be an obstacle for larger businesses. And strict zoning rules and building requirements can make it tough for new construction or renovation.

"It can be a pain," said Jake Hodesh, the head of Creative Coast, a nonprofit that aims to lure small firms to town. "But there's something about the way it looks and feels. It just works. And that's really comforting. It's a reminder that you can be successful and independent and live a robust life without having to be in the big city."

Hodesh is part of another key factor that's underpinned the city center's growth: A renewed emphasis on creative types, from artists to tech ventures, who call Savannah home. The nonprofit, funded by city officials, helps small companies push city policy, find investors and network with other local businesses, an echo effect that can help draw other creative industries to town.







A nascent bicycle coalition has helped pave the way for a growing web of bike lanes throughout town, where pedestrians now routinely dodge cyclists. A weekly farmer's market has also taken root in a massive intown park, fostering a growing foodie culture.

"Savannah is creating its own modern identity. It's no longer Savannah 1733 – it's Savannah 2012," said Hodesh. "It's a much more laid-back, smaller version of the expensive town you're used to living in."

There are scant numbers to quantify the trend, although the city's population has inched up modestly over the last decade, and the number of city approvals required to modify the historic buildings in downtown Savannah has almost doubled since 2009.

The Savannah metro area's unemployment rate is stuck around 9.2 percent, but job-generating projects include a \$30 million development in the city center anchored by the U.S. Attorney's Office, the first construction of its type in decades. A proposal to build a new downtown baseball stadium is floating around, city plan-

ners say, and Georgia Power has huge tracts of land for sale on opposite ends of River Street.

The real difference can be felt on the ground. Broughton Street, one of Savannah's main corridors, could feel almost empty in the late 1990s. Since then major retailers, including GAP and Banana Republic moved in, and more coffee houses and restaurants followed. Now the space above those ground-level floors is being converted to condos or rented as vacation homes.

"Things are still really tough, but downtown Savannah is not wasting away," said Bill Dawers, a teacher at Armstrong Atlantic State University and a freelance columnist for the Savannah Morning News. "We're seeing a really nice resurgence."

Kevin Lawver moved to Savannah about four years ago after working in San Francisco and Washington. He's now president of Rails Machine, a six-person web application company with an office you'd expect to find at a Silicon Valley startup: A ping pong table, a comfy lounge area and a makeshift bar where a keg of beer is always on tap. "Savannah is a perfect fit for a

certain type of company. Designers and developers can come here, work their butt off without distractions of a big city," said Lawver. "In San Francisco there's a conference or a workshop every week, but here I can hide when I want." Savannah's still grappling with competing tensions that could strain other cities, including ongoing fights between preservationists and local developers. But their truces have yielded triumphs like the redevelopment of Ellis Square, a restored greenspace surrounded by new buildings in the heart of the city.

With questions hanging about ambitious projects that stalled out during the recession, such as the mixed-use Savannah River Landing development, some say the city's future remains tied to its past.

"The economy has changed, but the plan doesn't need to," said Sottile, referencing the city squares that Gen. James Oglethorpe laid out almost 300 years ago. "It survived the American Revolution, the Civil War and the 20th Century. And now it's defining sustainability in the 21st Century."



Welcome

PADUCAH

WALL TO WALL

COMMENCED

1996

OUR HISTORY

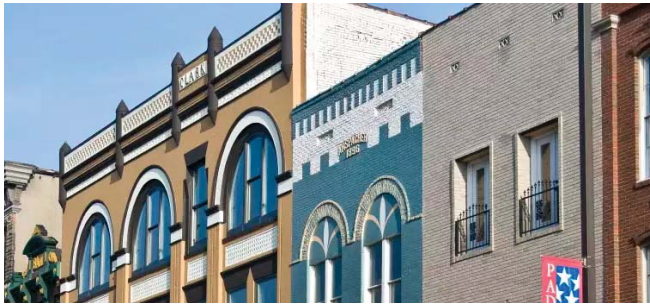
IN MURALS

DESIGNED & PAINTED by **ROBERT DAFFORD** LAFAYETTE LOUISIANA

HERB ROE BENNY GRAEFF DOUG DAFFORD MIKE DOHERTY

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# CASE STUDY PADUCAH, KY

## CULTURAL TOURISM: ATTRACTING VISITORS AND THEIR SPENDING

Americans for the Arts  
2014 National Cultural Districts Exchange

*Cheryl Hargrove*

In 2012, Paducah, KY received a Kentucky Cultural District Certification award. According to the Kentucky Arts Council, “Cultural districts are established to encourage city and county governments to partner with a local community non-profit or for profit organization, businesses, and individuals to enhance the quality of life for its citizens. Kentucky’s program is designed to showcase each community’s unique character and assets. The arts and areas with historic structures attract residents and tourists who also support adjacent businesses such as restaurants, lodging, retail, and entertainment. These districts attract a diverse and well-educated workforce —a key incentive for new and relocating businesses. These districts contribute to the creativity and innovation of a community.”<sup>1</sup>

The certification program encourages community engagement and partnerships that “facilitate the stimulation and promotion of local cultural, economic, community, tourism, and social assets.” Paducah came to this recognition with one of the nation’s first and most successful artist relocation programs. Launched in 2000, the city offered renovated historic buildings to artists as living and business locations in this district listed on the National Register of Historic Places. In five years, with the help of the Convention & Visitors Bureau, tourists from Chicago, St. Louis, Memphis, and Nashville came to explore events like Second Saturday along with the dozen galleries and shops open to the public in what became known as the LowerTown Arts District.

<sup>1</sup> Source: <http://artscouncil.ky.gov/Opportunities/CulturalDistrictCertification.htm>



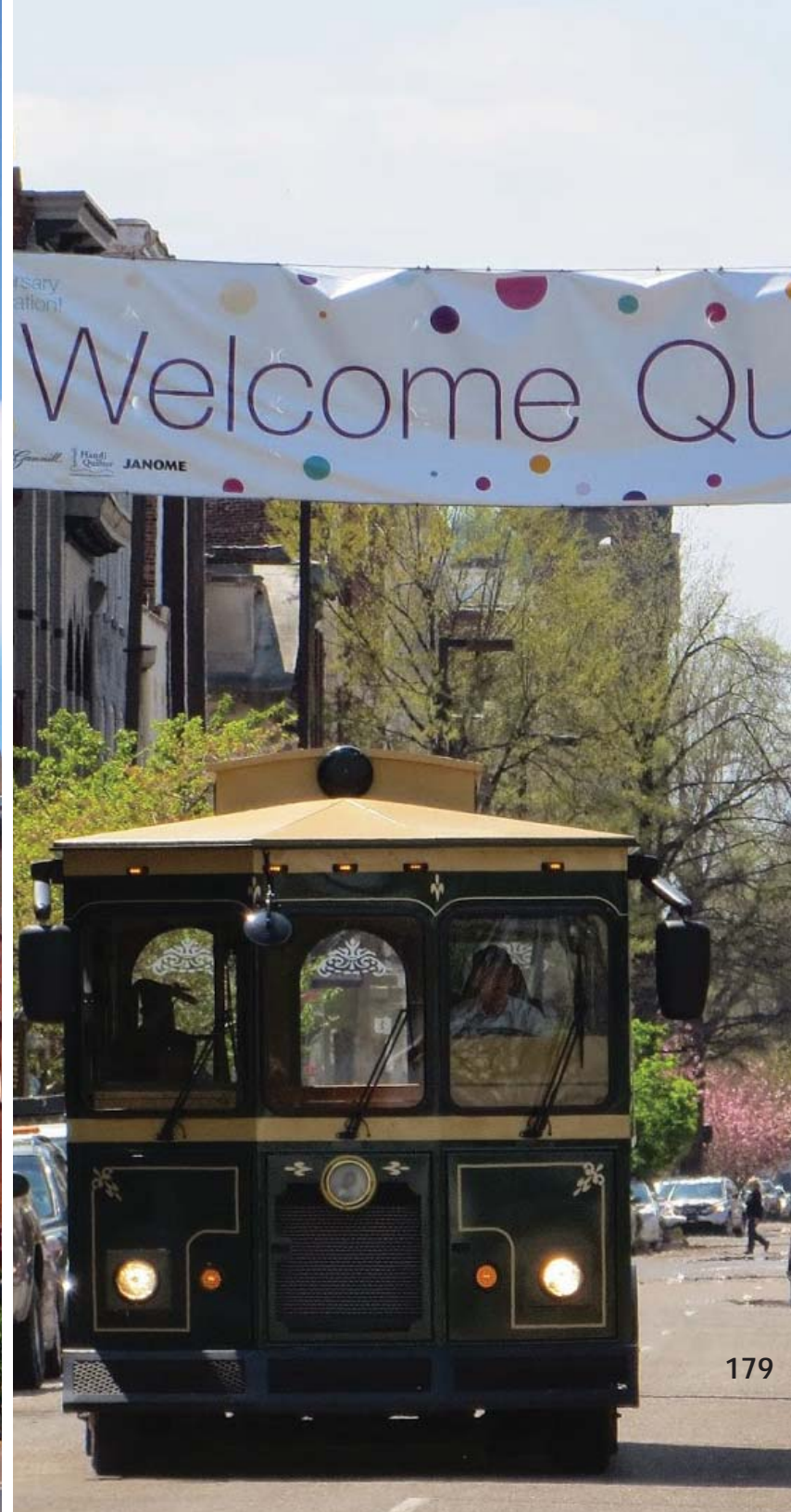
Following the recession, the LowerTown Arts District rebounded with urban boutiques and distinctive dining housed in 19th century architecture; more than 20 artists live and work there. The cultural district expanded in 2013 with the advent of the Paducah School of Art and Design. The school is locating several of its major facilities in rehabilitated structures and future renovations will establish the campus as the arts hub for LowerTown and Paducah. Recognized as the fan favorite of the National Trust for Historic Preservation's "Dozen Distinctive Destinations" in 2011, Paducah uses its cultural assets as its brand. A member of UNESCO's Creative Cities Network, Paducah is one of seven cities designated as "City of Craft and Folk Arts."

Solid management and strong communication is essential to sustainability of the cultural district, not only during the planning process but also in its ongoing development and operation. This "internal" marketing informs residents, community leaders, local media, and cultural district stakeholders about the opportunities associated with marketing to tourists.

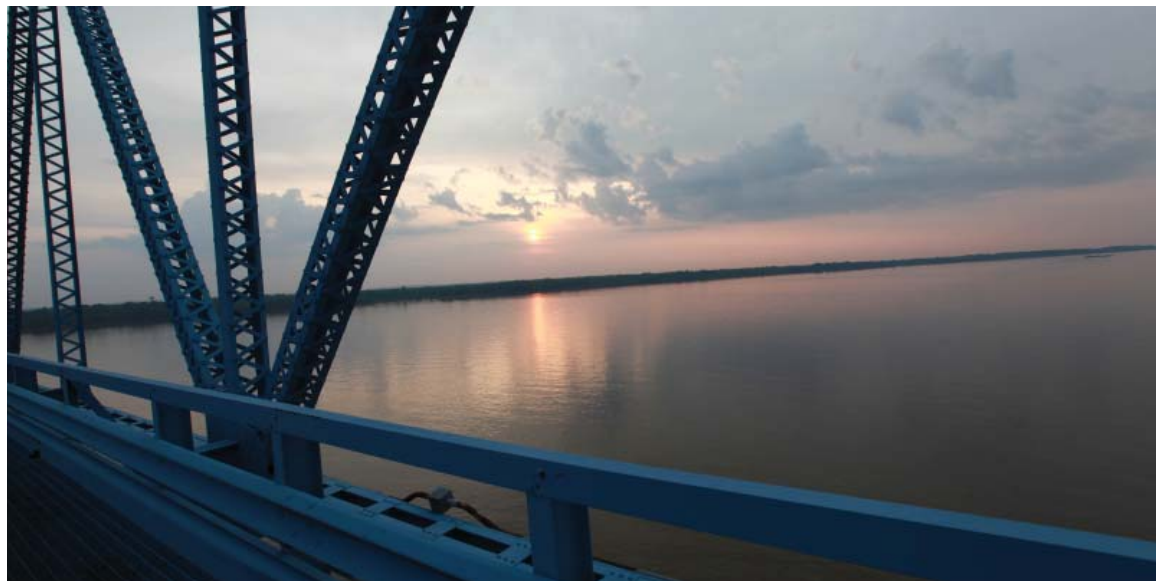
Newsletters, e-blasts, and other local correspondence can be shared about the cultural district's development, management, and upcoming activities and events. The internal communications plan should be created by the cultural district host organization and distributed to all stakeholders: government officials, district businesses and organizations, DMO, media, cultural institutions, artists, and others engaged in the district's planning, development, and operation. This effort helps define and recognize the relationships and responsibilities of various stakeholders involved in the successful development, management, and marketing of the cultural district.















## PADUCAH, KENTUCKY - CREATIVE CITY

April 15, 2014

*Lucy Moorman*

Paducah Kentucky is a small city full of surprises. It is located just three hours from St. Louis, two hours from Nashville, and three and a half hours from Memphis and Louisville making it an easy drive for a short trip away. Paducah has been designated as the world's seventh City of Crafts and Folk Art by The United Nations Educational Scientific and Cultural Organization (UNESCO). Not too shabby for a small town of 25,000 people. UNESCO recognizes Paducah's longstanding tradition of the fine craft of quilt-making and a strong presence of local artists and galleries. This is quite a privilege and upholds the ranks with other great art cities such as Santa Fe, NM and Kanazawa, Japan.

Near Interstate 24, you'll see the typical Americana of hotels, chain restaurants, and shopping malls as well as industrial areas but to get to the good stuff you need to drive five miles towards the rivers. The confluence of the Ohio and the Tennessee Rivers mark the Historic Downtown area. Here, you will find a lovely place to walk around with views of the Ohio river and a flood-wall painted with 50 murals depicting Paducah's history. Historic buildings are on every corner. A gazebo and horse drawn carriage linger near a large public parking lot. The warmth and charm of Paducah is unmistakable.

A popular place for lunch is Kirchoff's Deli, now in its 5th generation with Ginny Kirchoff who has a powerful voice as she announces whose number is up. It's mostly soup, salads and sandwiches with the original bakery attached for dessert lovers. Nothing on the menu is over \$6; the place is noisy and packed at lunch. Looking out the floor to ceiling windows, you'll see the block-long Market House. Previously a market place, it now houses the Yeiser Art Center, the Market House Museum and a theatre.

Paducah is well-known for quilts but not your typical grandmother's quilts. At the National Quilt Museum, the quilt is the canvas and fantastic shapes, colors and designs are a feast for your eyes. Frank Bennett, the CEO of the National Quilt Museum, is a young man who is very knowledgeable and passionate about fiber art. I was blown away by the beauty and complexity of these works of arts. This plain looking barracks-style building houses the largest quilt and fiber art museum in the world with a 320 piece collection on display along with 500 more quilts in storage.

Within walking distance of Downtown Paducah is LowerTown with about 25 art galleries. On a beautiful spring afternoon, start at Etcetera Coffee House revealing a very pleasant patio behind the building. Sip on a frozen Chai or Mocha and soon the friendly, warm folks of Paducah will start talking to you while you wait for the galleries to open in the afternoon. The folks of Paducah are happy to answer questions and share information. Since most of galleries

are also the artists' residences, the hours are pretty loose.

Paducah provides the Artist Relocation Program which began in 2000 as a way to attract artists to the area and upgrade a section of town. Offering financial incentives for purchasing huge homes in a dilapidated area (often as low as \$1) along with the possibility of becoming a part of a true art community caught the attention of many artists. To date, LowerTown artists/residents, through a generous and innovative financial arrangement offered by community partner Paducah Bank, have invested over \$30 million in restoring LowerTown.

The rock star of LowerTown is Caryl Bryer Fallert-Gentry, one of the more successful fiber artists living in Paducah (but moving in Spring 2014). Her work is amazing and very contemporary with vivid colors and smooth, rolling shapes. A recent marriage is causing her to relocate to Port Townsend, Washington. However Paducah gains a new artist and the home/gallery will remain a fiber art haven when Jo Anne and Jeff Louis will open Paper Pieces there this summer.

LowerTown is beautiful with historic southern homes and beautifully landscaped yards. We were there on perfect spring day and also enjoyed the 12 miles of dogwood trail that winds through residential neighborhoods, Downtown and LowerTown. The dogwoods were in full bloom during our visit.





*Tourist Development & Economic Opportunity*

# *TOURISM MARKET RESEARCH*

RESEARCH OBJECTIVE:

*To provide a lodging and visitor research that:*

- Identifies the current segmented markets, visitor geo/socio-demographic profile and spending levels.
- Identifies the attractors/motivators to visit Panama City, Florida.
- Identifies the core elements for future brand development.
- Analyzes hotel mix and potential for increases in occupancy.
- Identifies target markets, segments and strategies with the optimal ROI.
- Analyzes the convention/group market and recommends strategies for growth.



# Panama City, Florida

## Lodging Market Analysis



### Panama City STR Data

Young Strategies, Inc. purchased lodging data from STR (Smith Travel Research) in the form of a 6-year trend report for all participating hotel/motel properties located in Panama City, FL. The STR data reflects primarily the chain-affiliated hotel/motel properties. All tables and charts shown on the following pages have been created from the data provided in the STR 6-Year Trend report.



### Panama City Lodging Survey

Young Strategies, Inc. (YSI) conducted a survey of the hotel/motel properties located in Panama City, Florida as part of a comprehensive destination analysis commissioned by the Panama City Community Development Council (PCCDC). A one-page questionnaire was sent to all Panama City, FL lodging properties to estimate the following key metrics for the full calendar year 2015: percentage of occupancy driven by eight market segments, annual occupancy, average daily rates (ADR), and RevPAR. Hoteliers were also asked to provide ranking of market segments for future sales and marketing efforts as well as top leisure feeder markets.

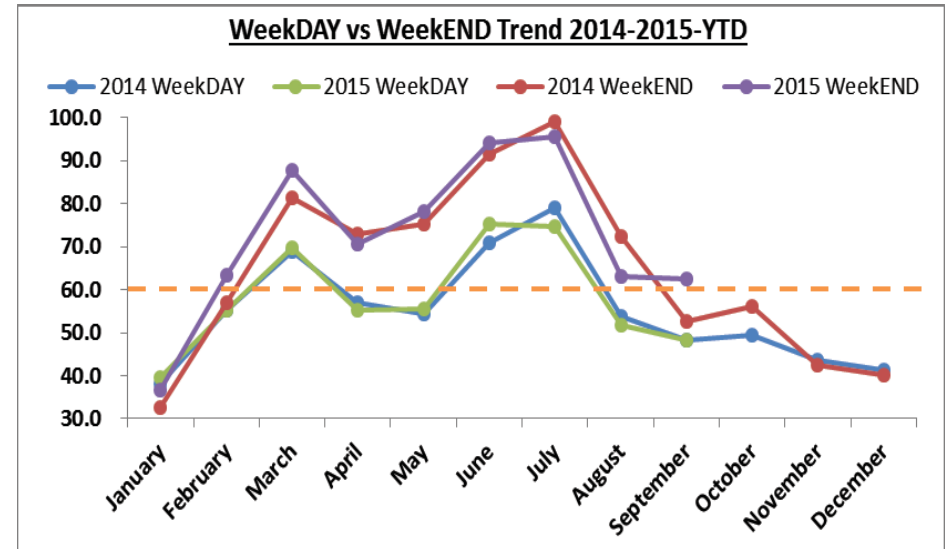
## LodgingSummary

### STR Data:

- Occupancy & room demand have increased every year since 2009 with no rooms added to the market during the same period.
- 2015 year-end forecast is 58.6% occupancy
- Weekends (leisure) outpace weekdays (business/group)
- Same monthly occupancy pattern as PCB - compression

### 2015 Lodging Guest Segmentation:

- A healthy mix of business, leisure, military and groups
- Business travelers (32%) drive a solid base weekdays year-round
- Leisure (19%) is mostly VFR & beach compression into Panama City
- Corporate meetings (15%) best group segment for growth
- Government/military transient & group are vital (21%)





# Panama City Lodging Study

## PANAMA CITY LODGING INVENTORY

Panama City, Florida currently has approximately 29 properties with a total of 1,960 rooms actively collecting the lodging occupancy tax. The majority of the inventory was built over a 40 year time period beginning in the 1960's through 1999. No new lodging construction took place from 1999 – 2005. Then, Panama City experienced significant growth in their lodging industry during the period 2006 - 2010 with the development of nine new properties. These nine properties added an additional 673 lodging rooms, accounting for slightly less than a third of the current lodging inventory (34.33%). No lodging development has occurred since 2010.



| Panama City Lodging- Area / Era                               | Open          | Rooms               |
|---|---------------|---------------------|
| <b><u>EAST – 18 properties = 68.2% of total inventory</u></b> |               | <b>1,336</b>        |
| El Panama Motel   | n/a           | 20                  |
| Knights Inn Panama City                                       | Jun-60        | 101                 |
| Relax Inn   | Jun-63        | 34                  |
| Holiday Inn Select Panama City                                | Jan-85        | 173                 |
| Super 8 Panama City   | Mar-87        | 60                  |
| Quality Inn & Conference Center Panama City                   | Aug-87        | 105                 |
| USA Inn   | Jun-91        | 15                  |
| Howard Johnson Panama City                                    | Oct-93        | 44                  |
| Best Western Suites   | Oct-94        | 50                  |
| La Quinta Inns & Suites Panama City                           | Jan-98        | 119                 |
| Hampton Inn Panama City Mall                                  | Jul-99        | 59                  |
| Country Inn & Suites Panama City                              | Oct-99        | 53                  |
| Courtyard Panama City   | Mar-06        | 84                  |
| Hilton Garden Inn Panama City                                 | Nov-06        | 111                 |
| Comfort Inn & Suites Panama City                              | Dec-06        | 69                  |
| Microtel Inn & Suites by Wyndham Panama City                  | Jul-07        | 63                  |
| Red Roof Inn Panama City                                      | Feb-08        | 73                  |
| TownePlace Suites Panama City                                 | Jan-10        | 103                 |
| <b><u>WEST – 11 properties = 31.8% of total inventory</u></b> |               | <b>624</b>          |
| Budget Inn  | n/a           | 25                  |
| Howard's Motel  | n/a           | 16                  |
| Fairway Inn   | Jun-60        | 31                  |
| American Quality Lodge Panama City                            | Jun-75        | 160                 |
| Econo Lodge Panama City                                       | Jun-86        | 51                  |
| Rodeway Inn (recently reflagged formerly Days Inn)            | Jun-90        | 49                  |
| Hathaway Inn  | Apr-97        | 82                  |
| Quality Inn & Suites Panama City                              | Jul-97        | 40                  |
| Comfort Inn & Suites Panama City                              | Oct-06        | 52                  |
| Ramada Panama City  | Sep-08        | 49                  |
| Suburban Extended Stay Hotel Panama City                      | Feb-09        | 69                  |
| <b>29 Total # of Properties</b>                               | <b>Rooms=</b> | <b><u>1,960</u></b> |

# Lodging Market Survey and Data

## 2015 ANNUAL LODGING MARKET SEGMENTATION

When marketing a community as a travel destination, it is critical to understand the different market segments that drive occupancy in local lodging properties. These segments help provide an understanding of the visitor categories that drive the greatest economic impact for the area. Most lodging properties track their guest segmentation through their reservation system. Corporate and group business is tracked closely by rate codes while leisure segment data is often estimated by the management team at the individual properties. The Panama City segmentation data below reveals:

- A healthy mix of business, leisure, military and groups
- Business travelers (32%) drive a solid base weekdays year-round
- Leisure (19%) is mostly VFR & beach compression into Panama City
- Corporate meetings (15%) best group segment for growth
- Government/military transient & group are vital (21%)

| 2015  | Panama City Lodging Guest Segmentation                                       |
|-------|--|
| 64.7% | Transient & Other  |
| 31.7% | Business Transient (individual business travelers)                           |
| 19.0% | Leisure Transient (visitors to PC, visiting beach, friends & relative, etc.) |
| 12.7% | Government / Military Transient  |
| 1.3%  | Other  |
| 35.3% | Group/Conference/Meeting   |
| 15.4% | Corporate  |
| 8.7%  | Government/Military  |
| 4.8%  | Sports   |
| 3.2%  | SMERF (Social, Educational, Religious, Fraternal)                            |
| 2.7%  | Group Tour/Motorcoach  |
| 0.5%  | Association  |

## FUTURE TARGET GROUP SEGMENTS (RANK ORDER)

Having established the current market segmentation for those staying in Panama City, FL lodging, YSI asked the hoteliers to indicate in rank order what markets should be targeted for future growth in the group markets. The prioritized ranking for future direct sales efforts by the Panama City TDC is shown in the table below as provided by the lodging properties that responded to this question. Eight lodging properties reported data about future marketing segments.

The top ranked segments are highlighted in blue.

| Group Market Segment                      | Rank Order | Rating |
|---|------------|--------|
| Corporate                                 | 1          | 1.3    |
| Government/Military                       | 2          | 3.2    |
| Sports                                    | 3          | 3.5    |
| Association                               | 4          | 3.8    |
| Social, Educational, Religious, Fraternal | 5          | 4.4    |
| Group Tour/Motorcoach                     | 6          | 4.4    |



# Lodging Market Survey and Data

## PLEASE LIST ANY MAJOR SHIFTS OR CHANGING TRENDS IN ROOM NIGHT SALES YOU HAVE NOTICED OVER THE LAST YEAR:

Hoteliers were asked to provide any insight into major shifts or changing trends in room night sales in Panama City, FL over the last year. Five properties responded; verbatim comments are categorized by the two geographically segmented lodging areas, designated as East and West Panama City.

### East

- Group sales are down; more multi-night stays
- We had more long term stays last year than we have this year with government contractors. Medical industry has started to decline YOY each year for the last 3 years.
- Increase in room nights, beach travel

### West

- More groups from sport teams
- TDC on the beach has more event

## HOTEL/MOTEL FUTURE SALES AND MARKETING SUGGESTIONS FOR PANAMA CITY CDC:

Hoteliers were asked to provide any insight into major shifts or changing trends in room night sales in Panama City, FL over the last year. Eight properties responded; verbatim comments are categorized by the two geographically segmented lodging areas, designated as East and West Panama City.

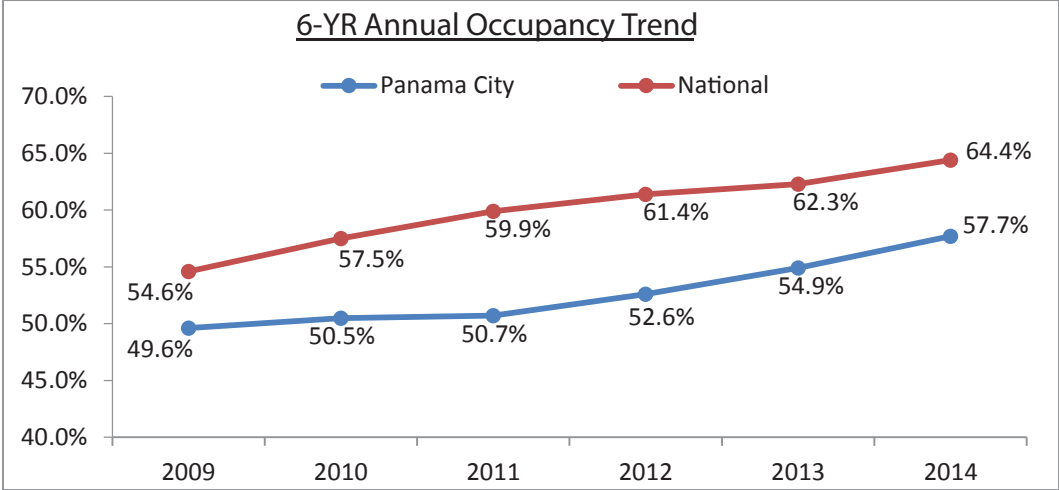
### East

- Future development of downtown
- We like when there are dance competitions etc. that flood the market, that aids while we are trying to capture rate from the corporate market. Marketing strategies need to be to drive occupancy on shoulder nights (Thurs, Fri, Sat, Sun) shoulder season and off season. The market has so much military we are not able to take them during certain times of the year because the per diem rate in the area is too low. Our pattern typically has us sold out Tues, Wed and if gov't is not long term it is difficult to get the reservations in.
- Would be happy to discuss in person.
- sports marketing, invest in Harder's Park, cheer/dance camps
- promote industries to come to Panama City, promote H.G. Harder's park, tournaments, etc.

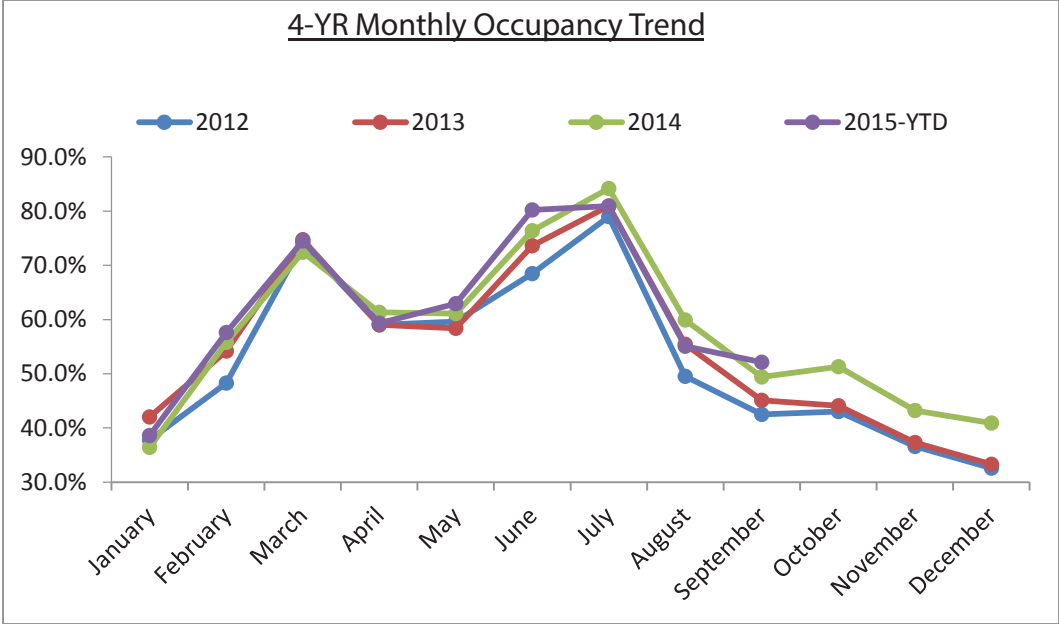
### West

- Have more sport and fishing tournaments. Have a airport shuttle to all hotels. In future have a convention center.
- Get the better transportation from ECP airport. Bring some event in the time of Oct/Nov/Dec/Jan that can help the hotels.
- Target towards bigger companies, more sports teams instead of just baseball groups.

# Panama City Lodging Study



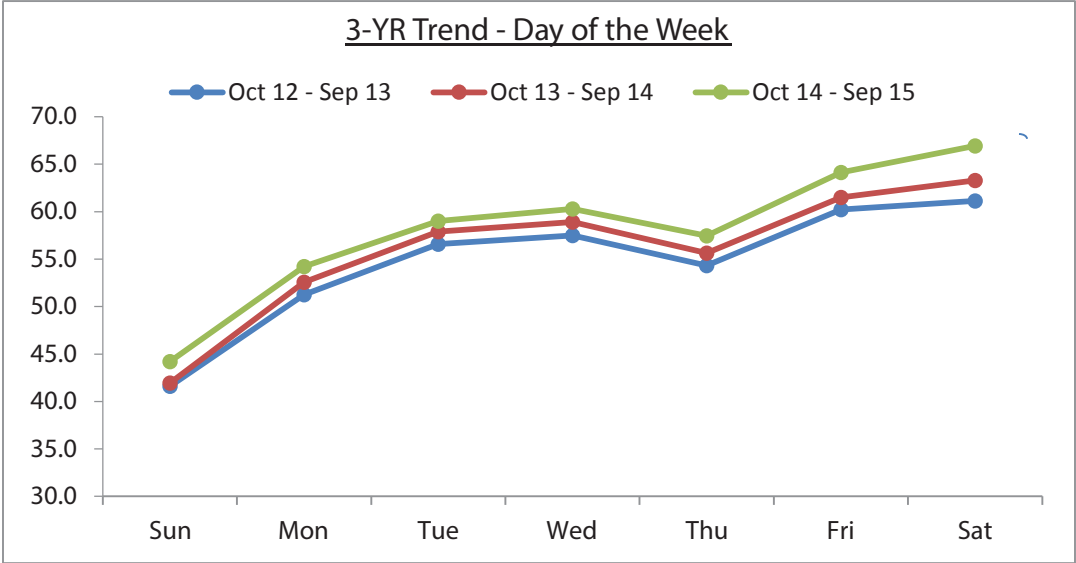
- Observations:**
- The Panama City annual occupancy trend mirrors the national trend since 2009 and consistently lags by 4-5 percentage points.
  - Annual occupancy has improved from the low year of 2009 at 49.6% to 57.7% in 2014.



- Observations:**
- The four-year monthly occupancy trend reveals an annual consistency with July the highest month in occupancy followed by June and March.
  - The pattern of three peak months directly corresponds to the annual pattern in Panama City Beach indicating significant compression for room demand coming from the beach.

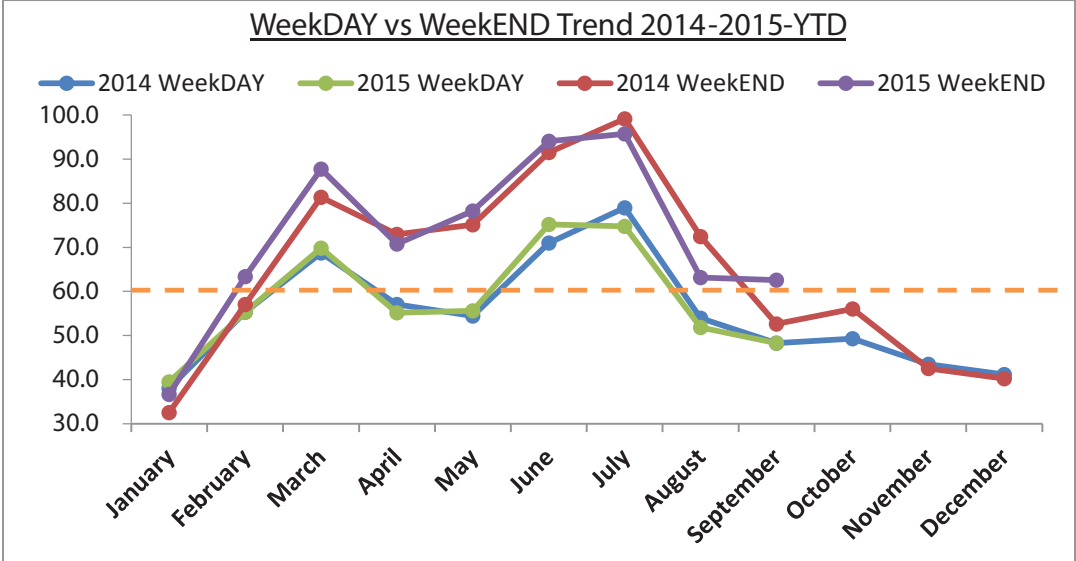


# Panama City Lodging Study



**Observations:**

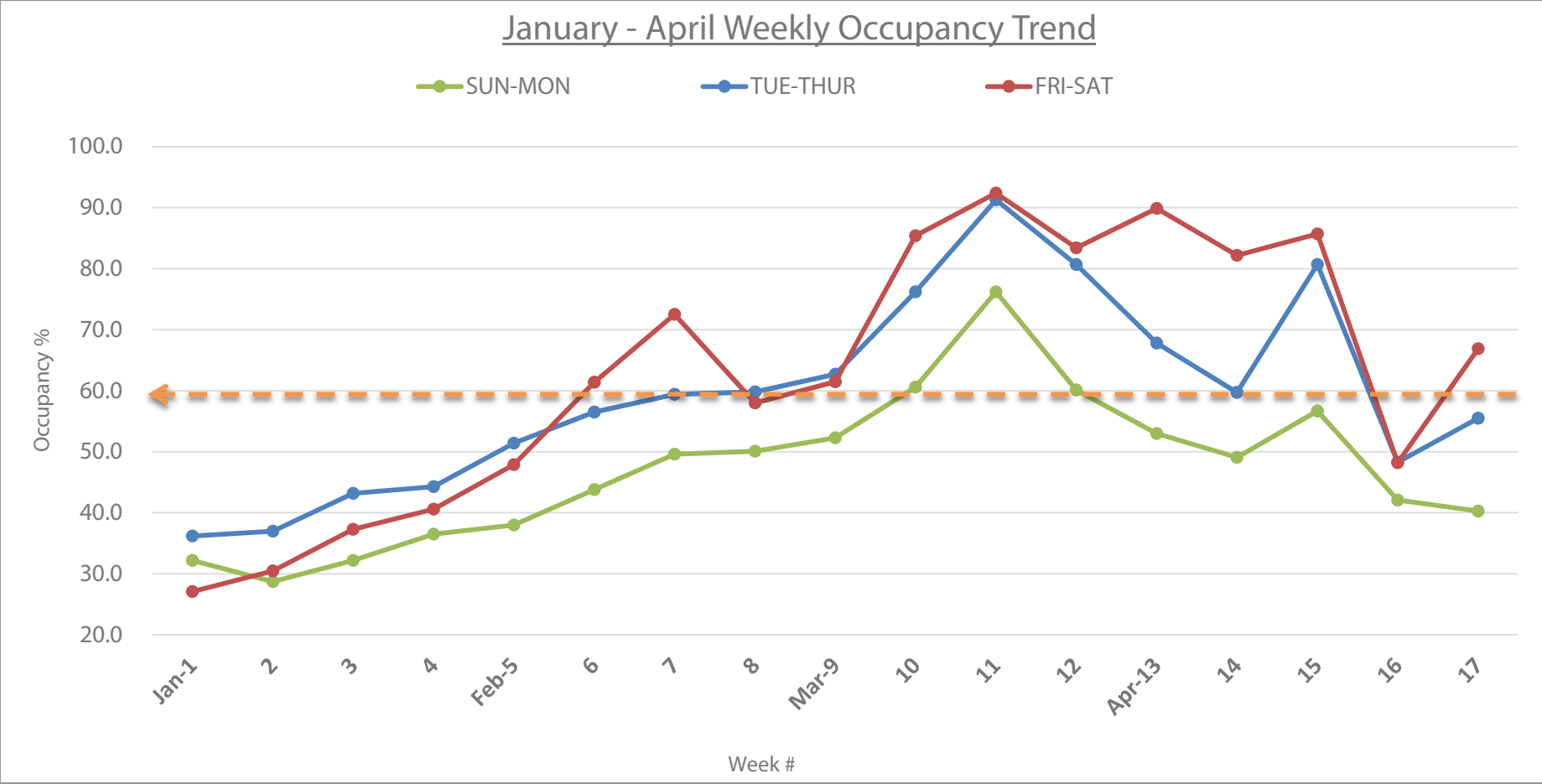
- The three year daily average occupancy trend line shows Friday and Saturday to be the most popular nights and Sunday to be the least in demand.
- Tuesday and Wednesday are typically the busiest nights for business travelers in local lodging.



**Observations:**

- The chart on the left compares weekend and weekday occupancy levels for 2014 and 2015. Weekends consistently outpace weekdays except during the November to January winter months.

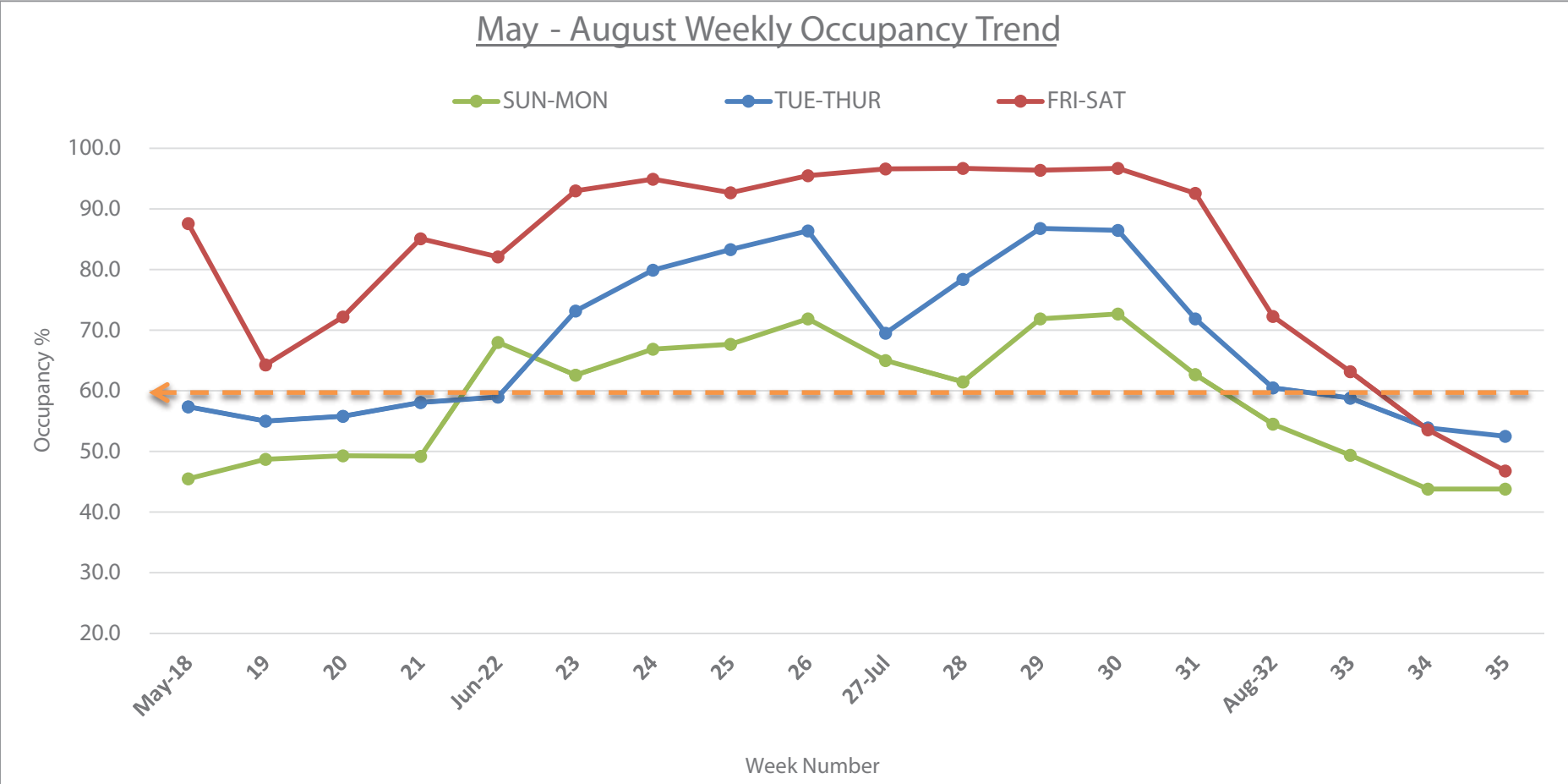
# Panama City Lodging Study



- Observations:**
- January is a low occupancy month with no week or time within the week exceeding 45%.
  - February builds momentum into the 50% occupancy range
  - March/April is one of the busiest periods of the year with Tues – Sat consistently above 60%.

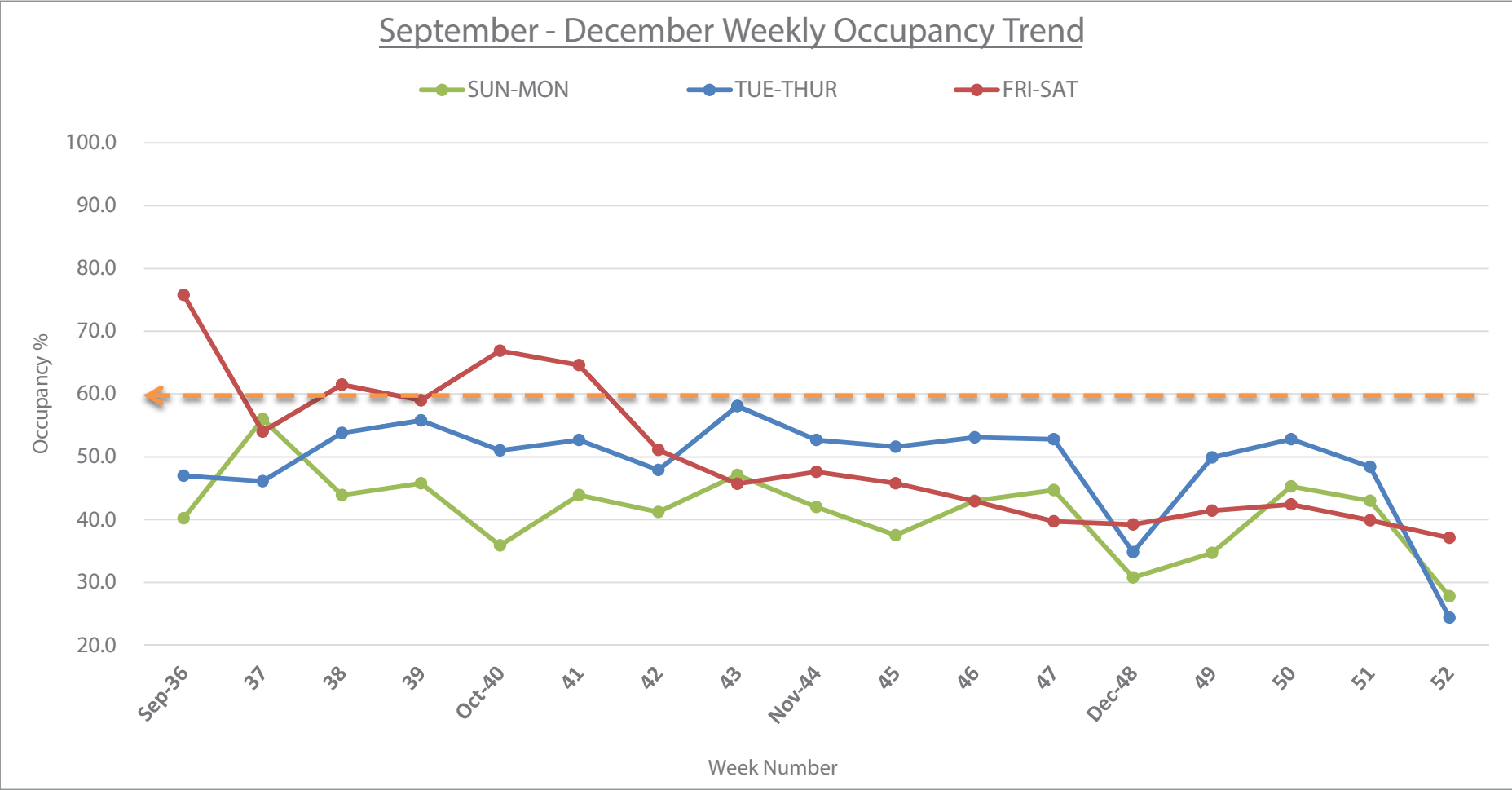


# Panama City Lodging Study



- Observations:**
- Weekend occupancy rarely dips below 70% May - July.
  - Tues – Thurs occupancy peaks in July
  - School opening the first of August impacts lodging occupancy which then remains below 60% until Labor Day weekend.

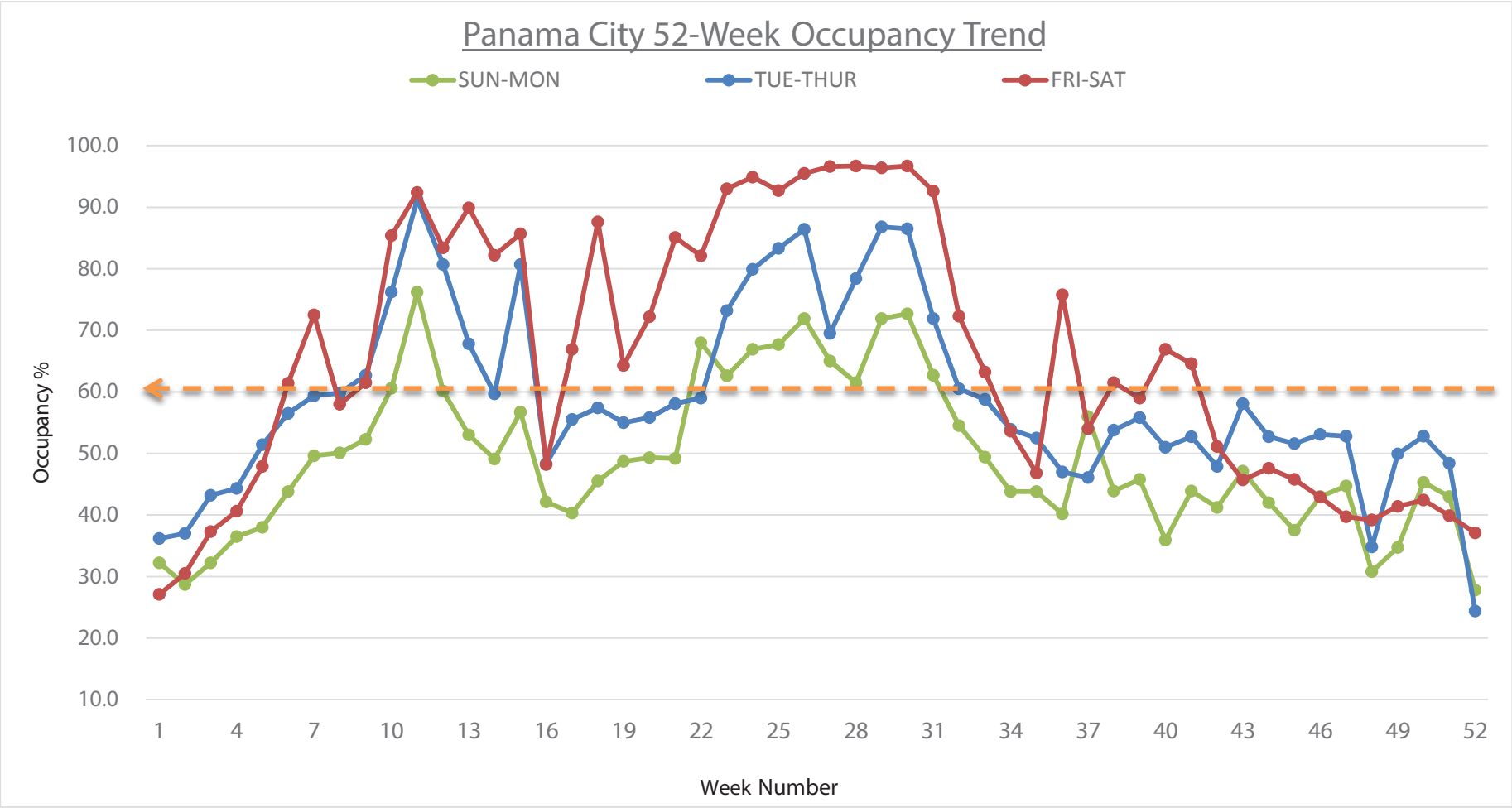
# Panama City Lodging Study



**Observations:**

- Labor Day weekend has high occupancy Friday and Saturday only.
- Sunday through Thursday remains below 60% September through December.

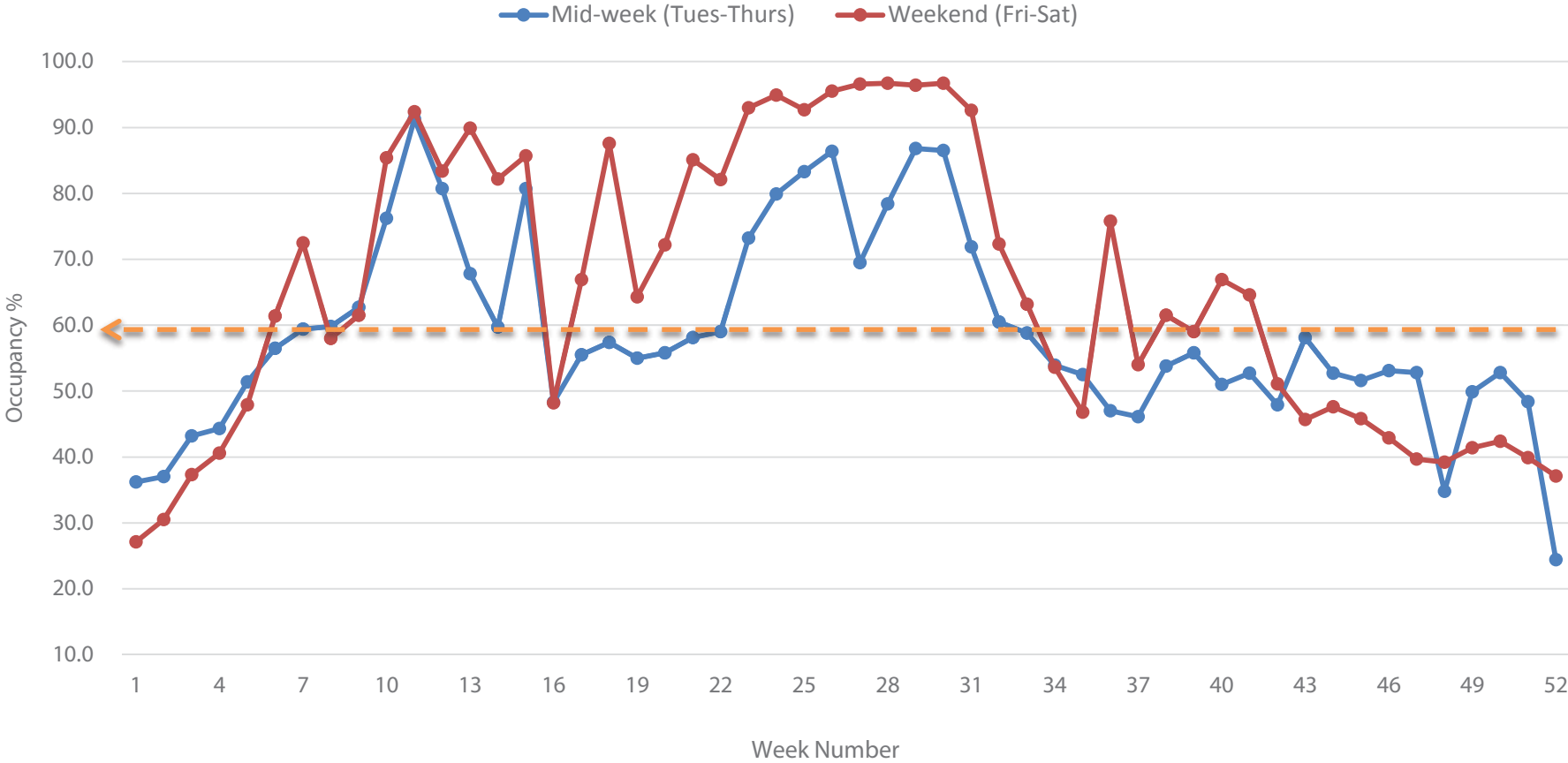




**Observations:**

- Occupancy pattern matches PCB annual pattern.
- Weekends outpace weekdays.
- Sunday-Monday are typically the lowest occupancy nights.

## Panama City 52-Week Occupancy Trend- Mid-week vs. Weekend

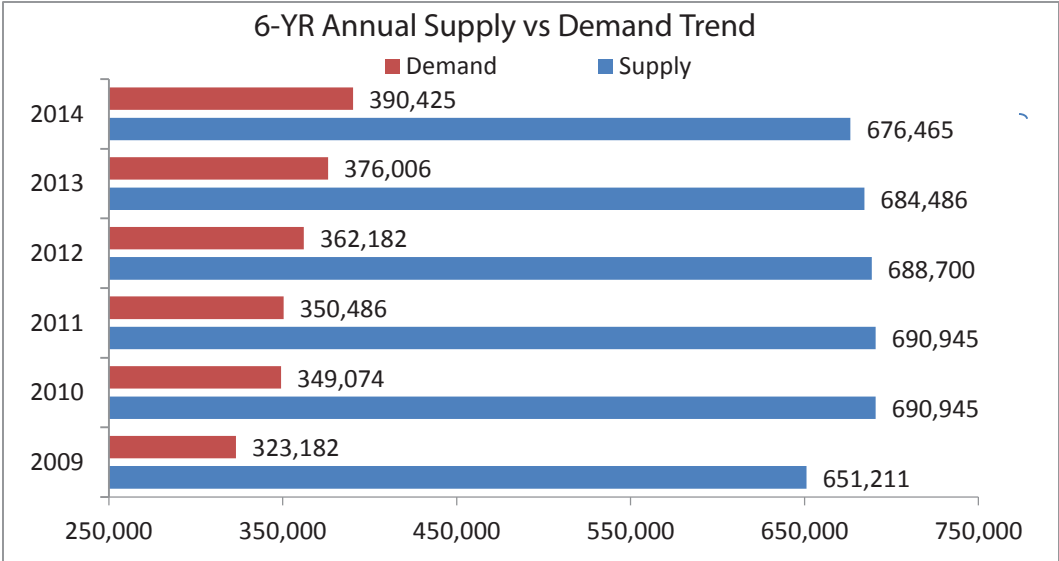


**Observations:**

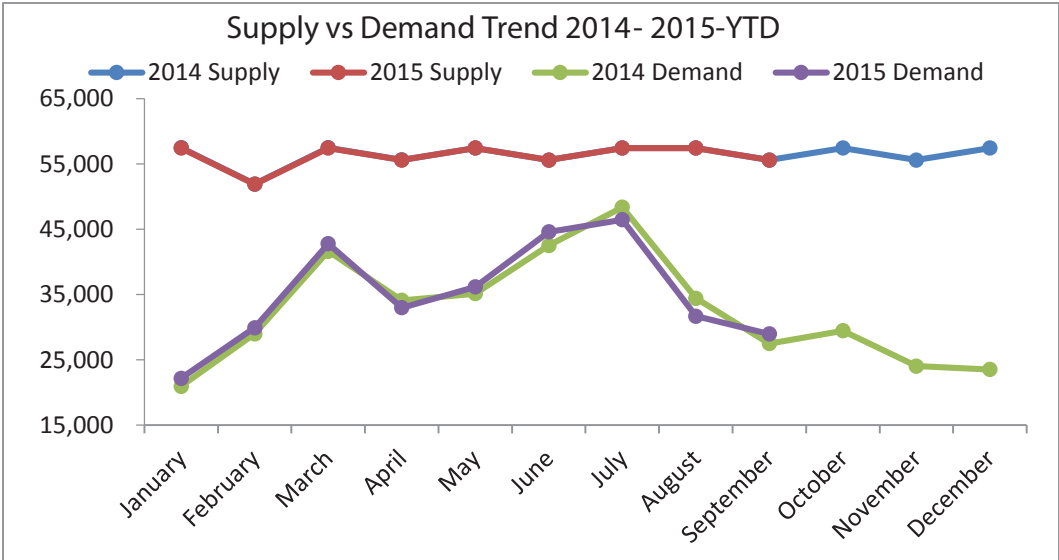
- Weekends typically outpace weekdays during peak seasons.
- Weekdays outpace weekends during the slower autumn and winter months



# Panama City Lodging Study

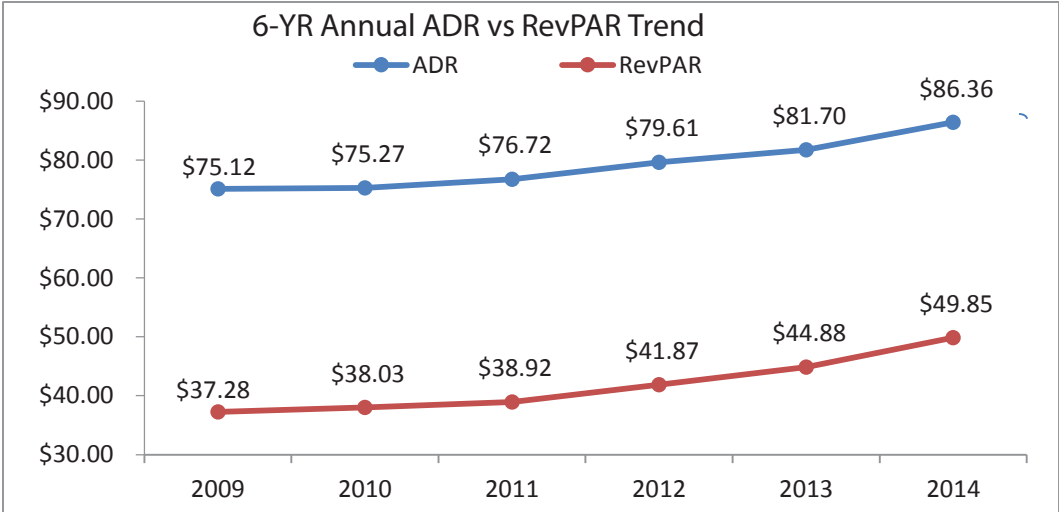


- Observations:**
- The annual supply of rooms in Panama City is determined by multiplying the number of rooms in the market by 365 days in the year.
  - The chart shows the growth in supply that occurred in 2010 when a Towneplace Suites was opened in January of that year.
  - The red bars reveal a consistent annual growth in room demand from 2009 to 2014.

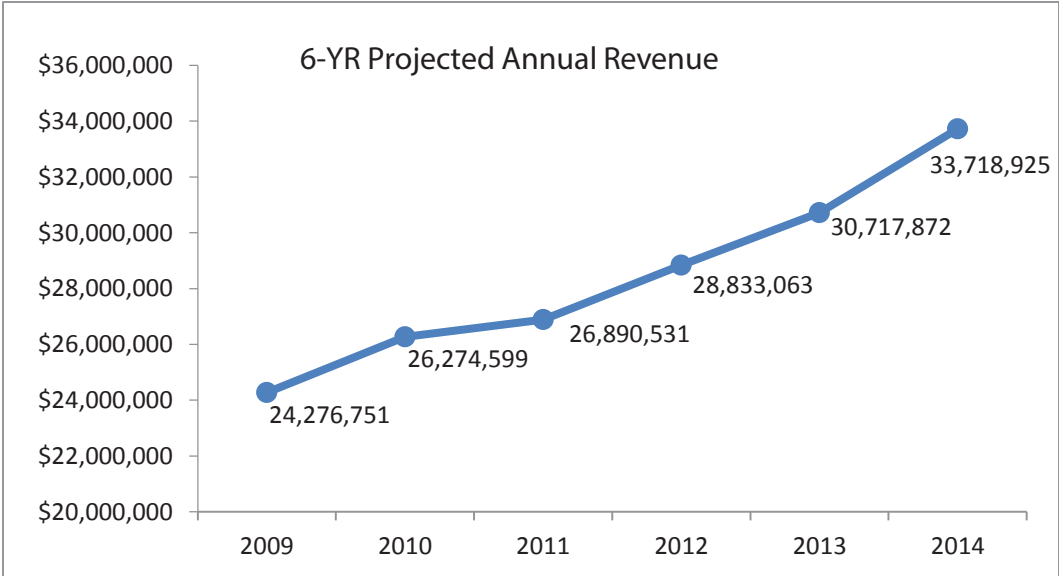


- Observations:**
- The chart on the left displays the monthly supply and demand for 2014 and 2015.
  - Monthly room supply dips in February which has 28 days and peaks in the months that have 31 days.
  - Demand peaks in July, followed by June and March. April and May have solid demand with significant room for growth in the remaining months.

# Panama City Lodging Study



- Observations:**
- ADR = Average Daily Rate for the rooms sold in Panama City.
  - Panama City hotels have raised their rates annually going from \$75.12 to 86.36 in 2014.
  - RevPAR = Revenue Per Available Room.
  - RevPAR is calculated by dividing gross room revenues by all rooms available. Therefore it merges rate with occupancy to provide a reliable metric for performance. When RevPAR is 50% of ADR it indicates that occupancy is 50%.



- Observations:**
- The chart on the left reveals the annual gross room revenues for the hotels that report to STR for Panama City.





# Panama City, Florida

## Current Visitor Profile

### Final Report – December 10, 2015

Prepared for: Panama City Community Development Council

- Study Conducted: October– December, 2015
- Study period: Calendar Year 2015 & Prior Years
- Draft Report Submitted: December 10, 2015

# Panama City Visitor Profile

## Purpose

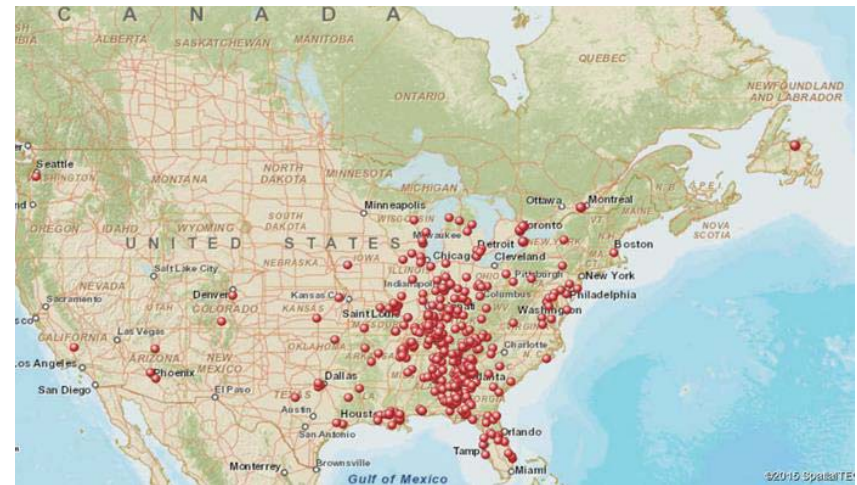
To document the profile and planning preferences of those who visit Panama City, FL. The online survey captures the perceptions of Panama City as a destination, and the attractors that induce day trips, overnight visits, multiple night-stays, and repeat visitation.

## Methodology

An online survey instrument was prepared by the Young Strategies research team to capture visitor perceptions of Panama City. The survey was deployed by Panama City area businesses to their visitor databases. Each business was provided a unique link to the survey. Email recipients were invited to take a visitor survey and be entered into a chance to win a VISA gift card. Survey respondents include visitors to Panama City and residents who have hosted visitors in Panama City over the last year.

The range of surveys received from visitors and residents represents a broad range of behaviors and experiences and is deemed to be predictive of overall travel patterns for the destination. Survey deployment began the last week of October and continued through November.

The survey response data identifies: travel party demographics, point-of-origin, primary trip purpose, length of stay, spending, activities, desired new activities, trip planning habits and trip satisfaction. The data has many parallels with the Panama City Beach visitor research regarding visitation patterns throughout the year and overall trip behavior.





## Visitor Survey Findings

- Average age of respondents is 49, mix of Visitors (34%), Residents (60%), long term visitors (6%)
- Trip Purpose - 88.0% Leisure visit, 8.0% Business trip, 4.0% Conference/meeting
  - Top 4 leisure trip purposes – VFR 36.4%; Beach 25.0%; Relaxation 13.6%; Festival/event 4.6%
- Booking predominantly within 1 month before the trip (short lead time).
- 93% drive via car/truck/van/SUV/motorcycle. 7% fly/drive
- Average party size = 3.5 visitors typical party of 2 people. Parties ranged from 1 to 17 people.
- Visitors reported visiting all season and months – predominantly April, June, July, and August
- The average length of stay is 5.7 nights (leisure), with a typical stay of 1 - 4 nights.
- Where did the visitors dine? PCB (74%); PC (54%)
- Where did they shop? PCB (54%) PC (35%)
- Where else did they visit during their trip to PC – PCB (69.1%); Downtown PC (30.8%); St. Andrews Marina Area (27.1%); PC Mall (23.5%)
- Rating of the total experience in PC = 4.3 on a five point scale.
- Desired new activities: more restaurants; smooth traffic flow; improve downtown.







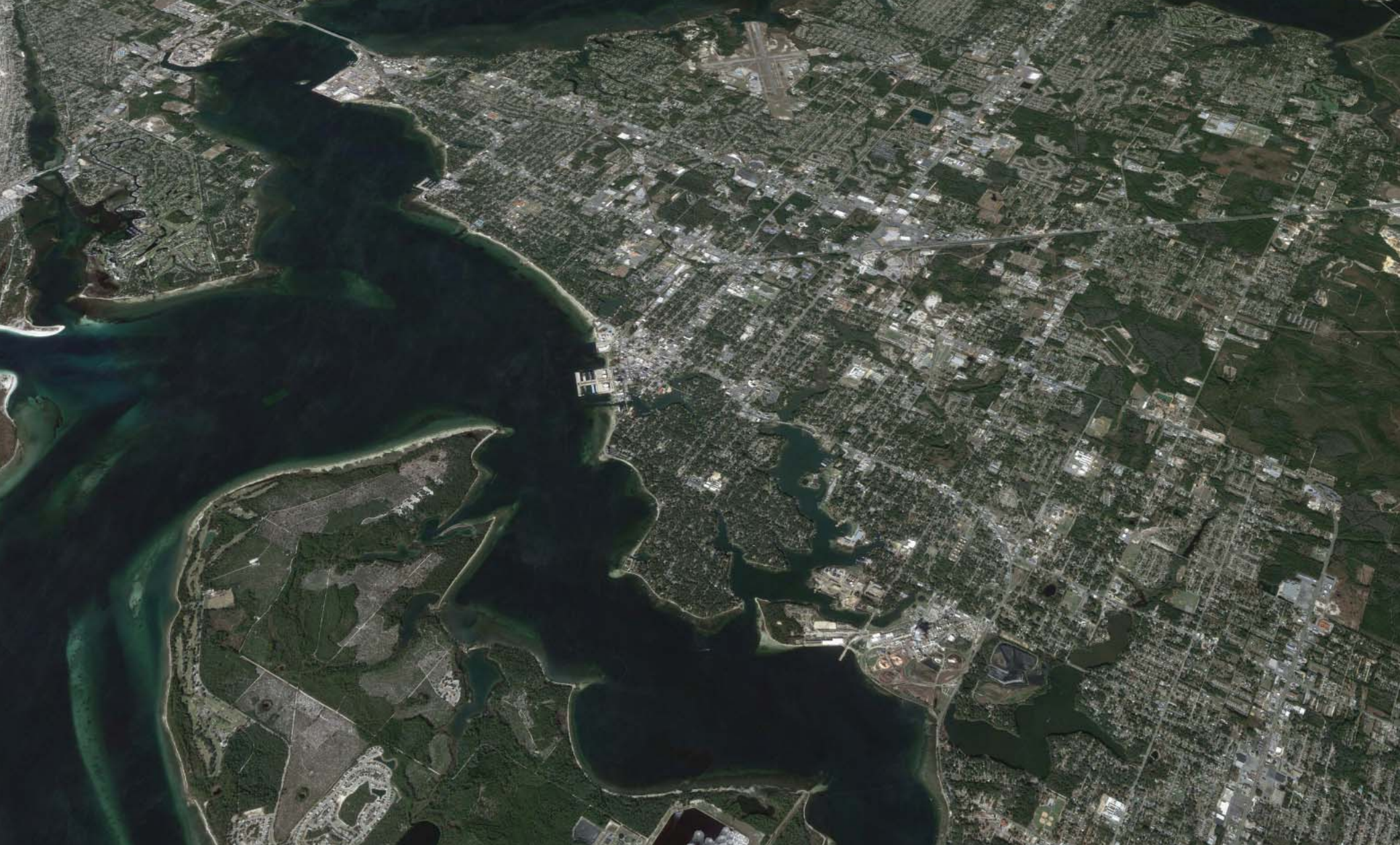


*Tourist Development & Economic Opportunity*

# *SITE RESEARCH*

*GIS MAPPING*

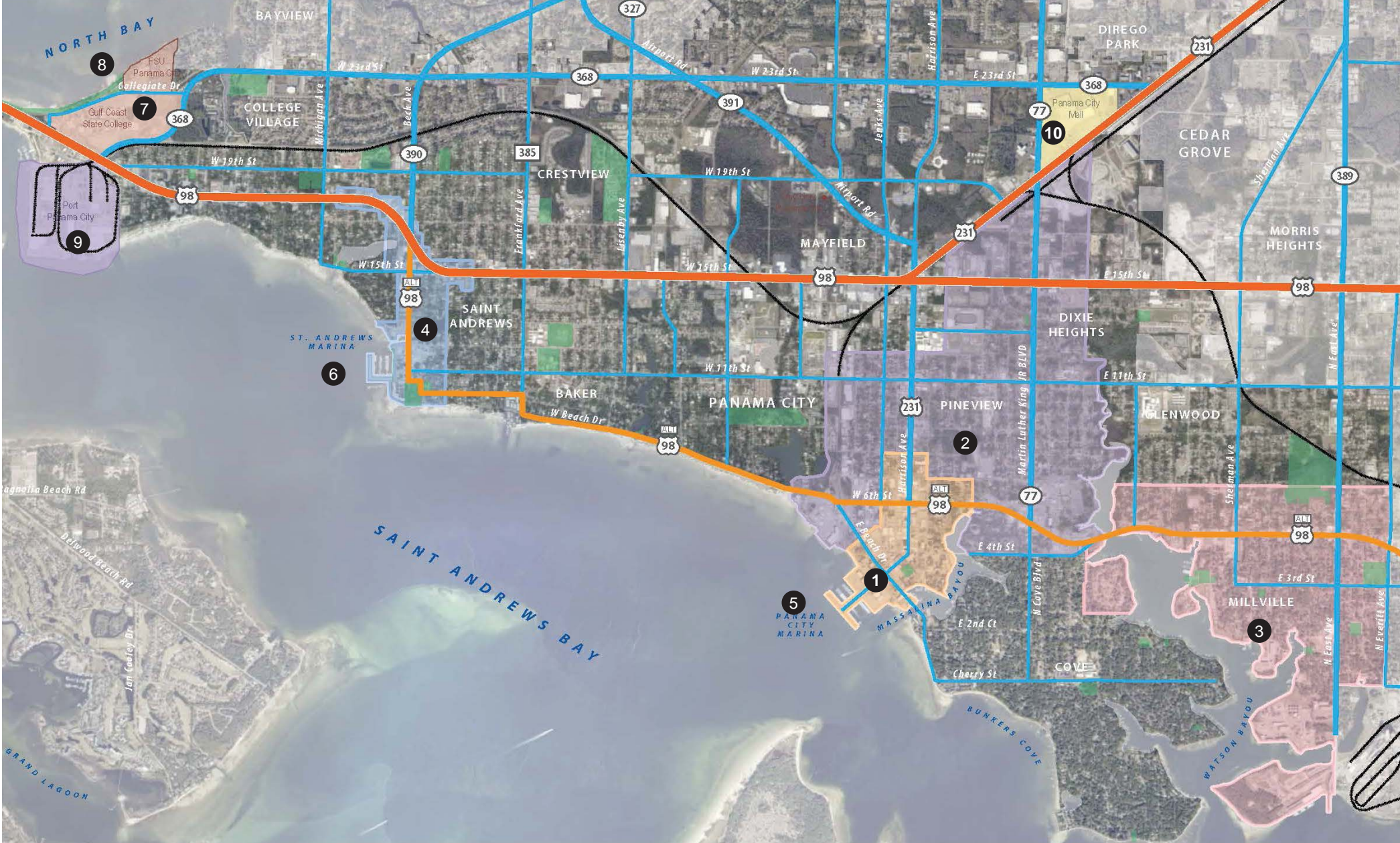




Aerial View







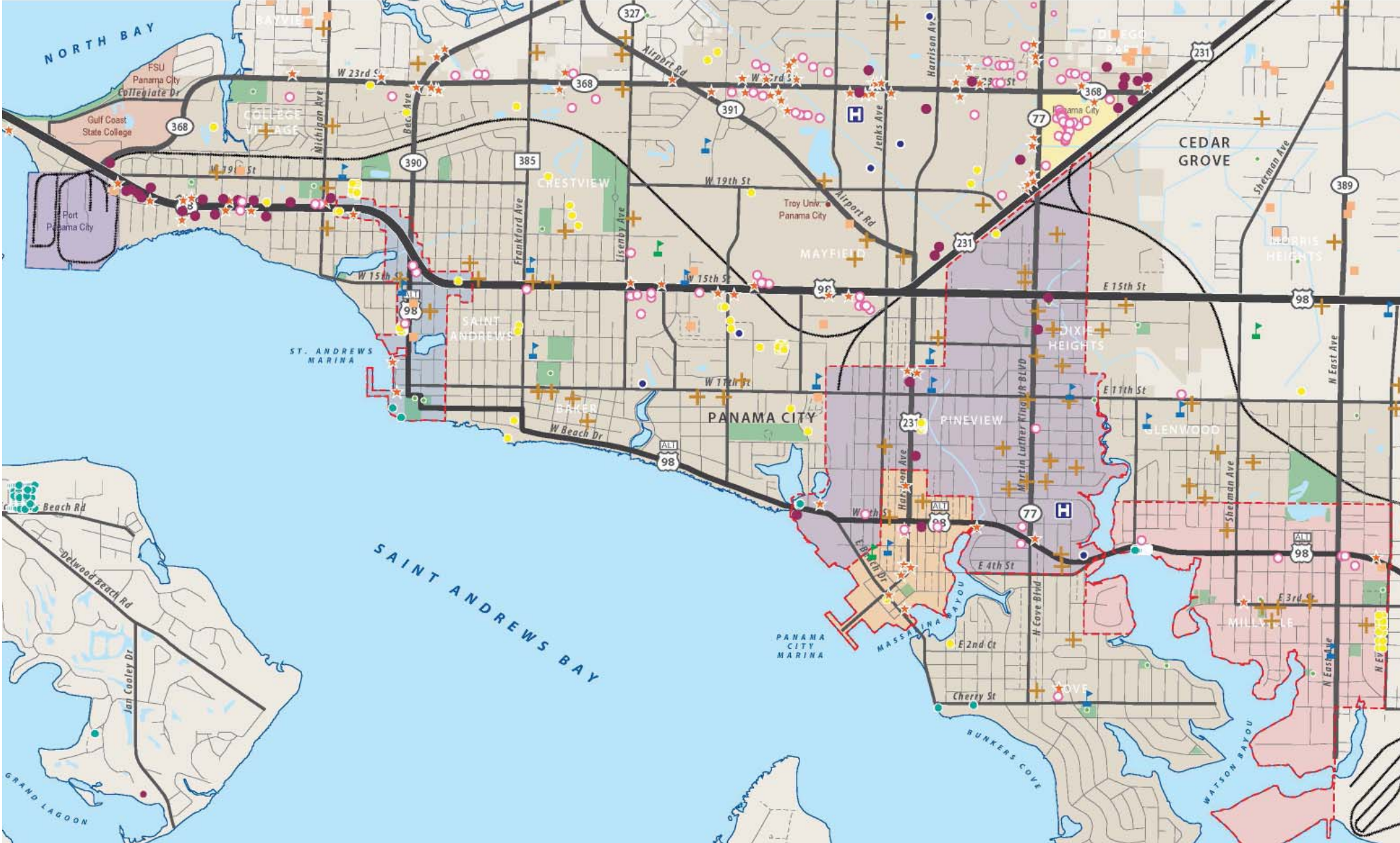
Area Map

- 1 Downtown CRA
- 2 Downtown North CRA
- 3 Millville CRA
- 4 St. Andrews CRA
- 5 Panama City Marina
- 6 St. Andrews Marina
- 7 Gulf Coast State College
- 8 FSU - Panama City
- 9 Port Panama City
- 10 Panama City Mall

















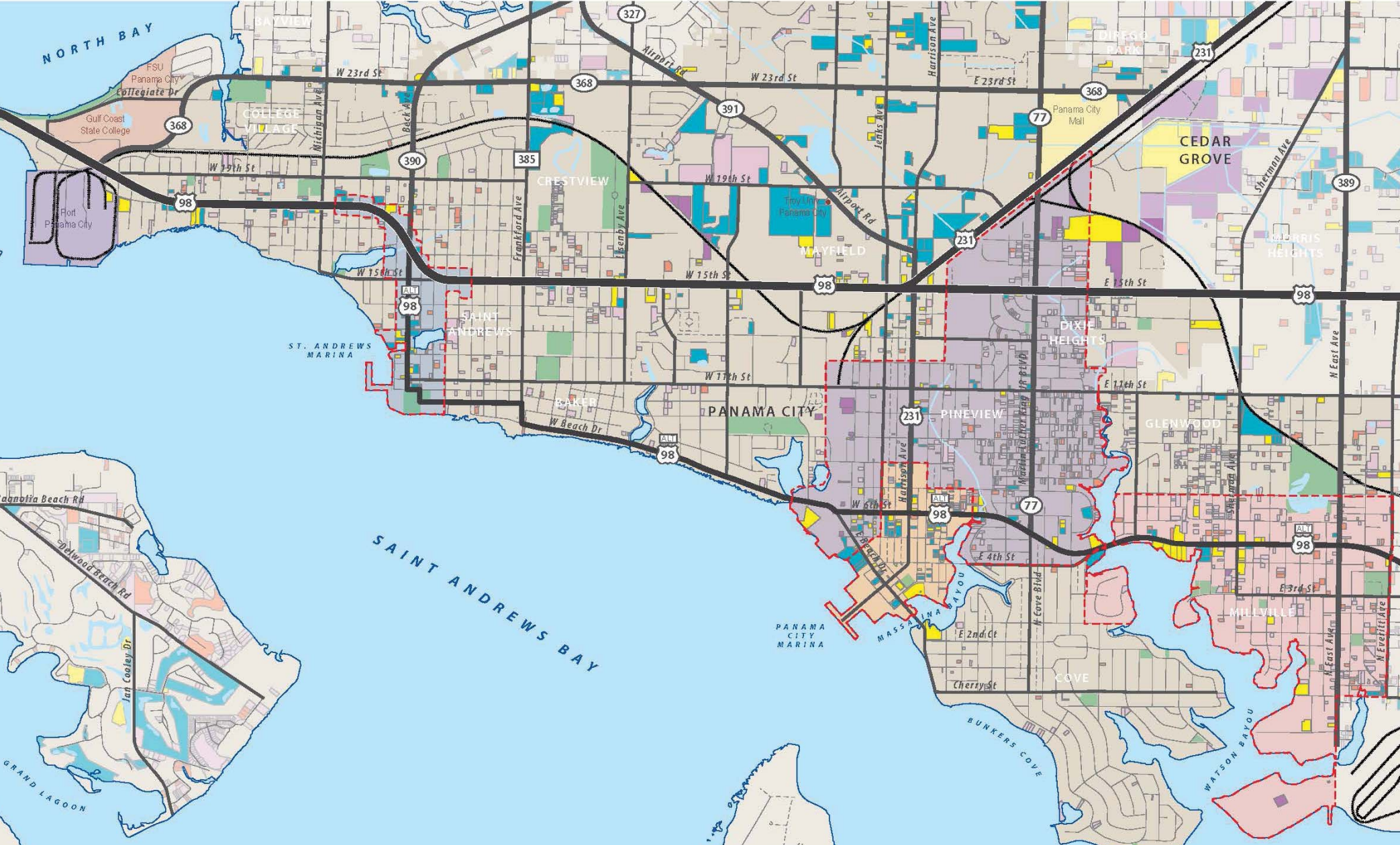




## Places of Interest

- |   |   |  |
|---|---|--|
|  Schools     |  Retail            |  Housing      |
|  Post Office |  Hotel             |  Condos       |
|  Medical     |  Dining            |  Apartments   |
|  Parks       |  Places of Worship |  Mobile Homes |

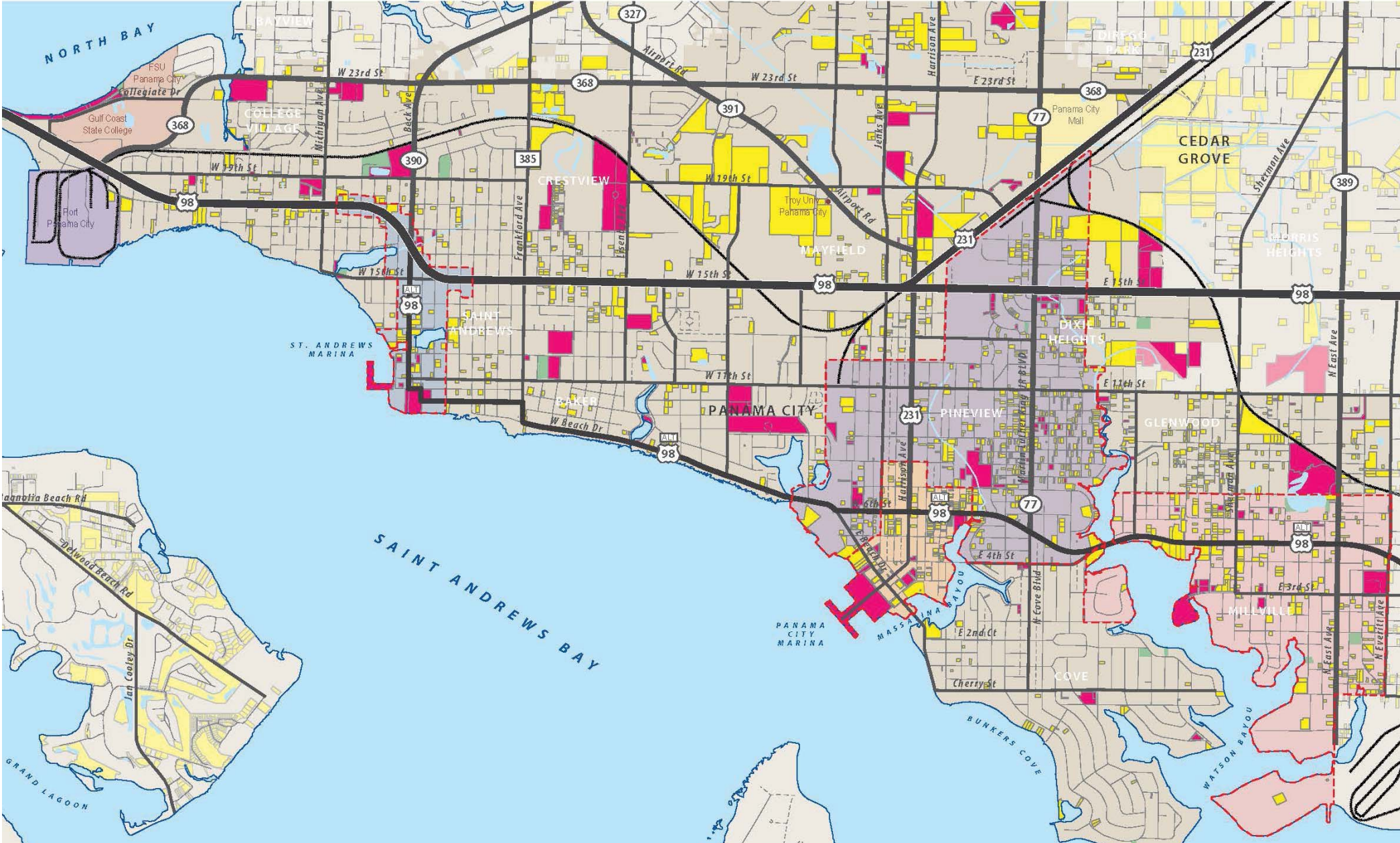




Vacant Parcels Map

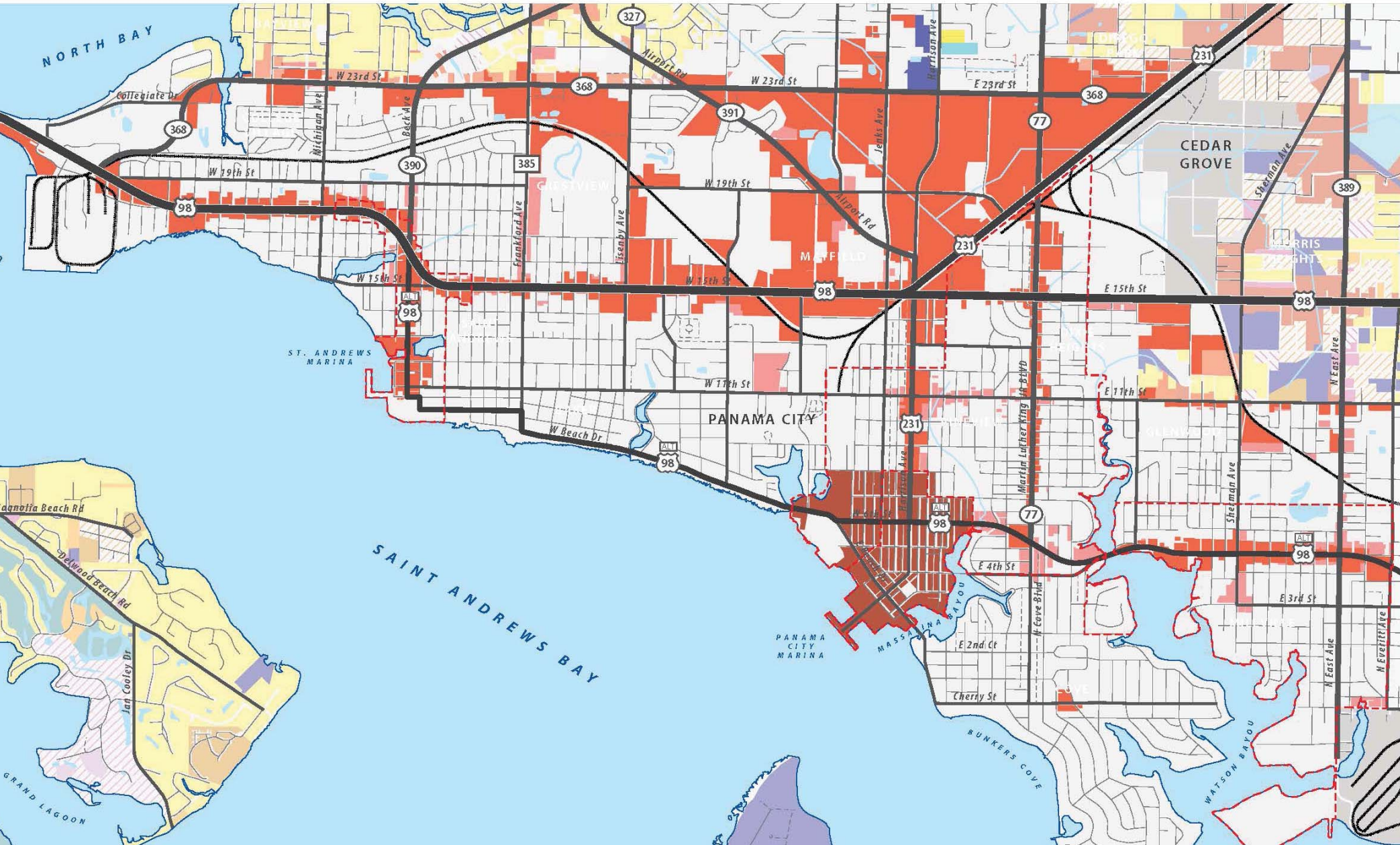






City-Owned + Vacant Parcels Map

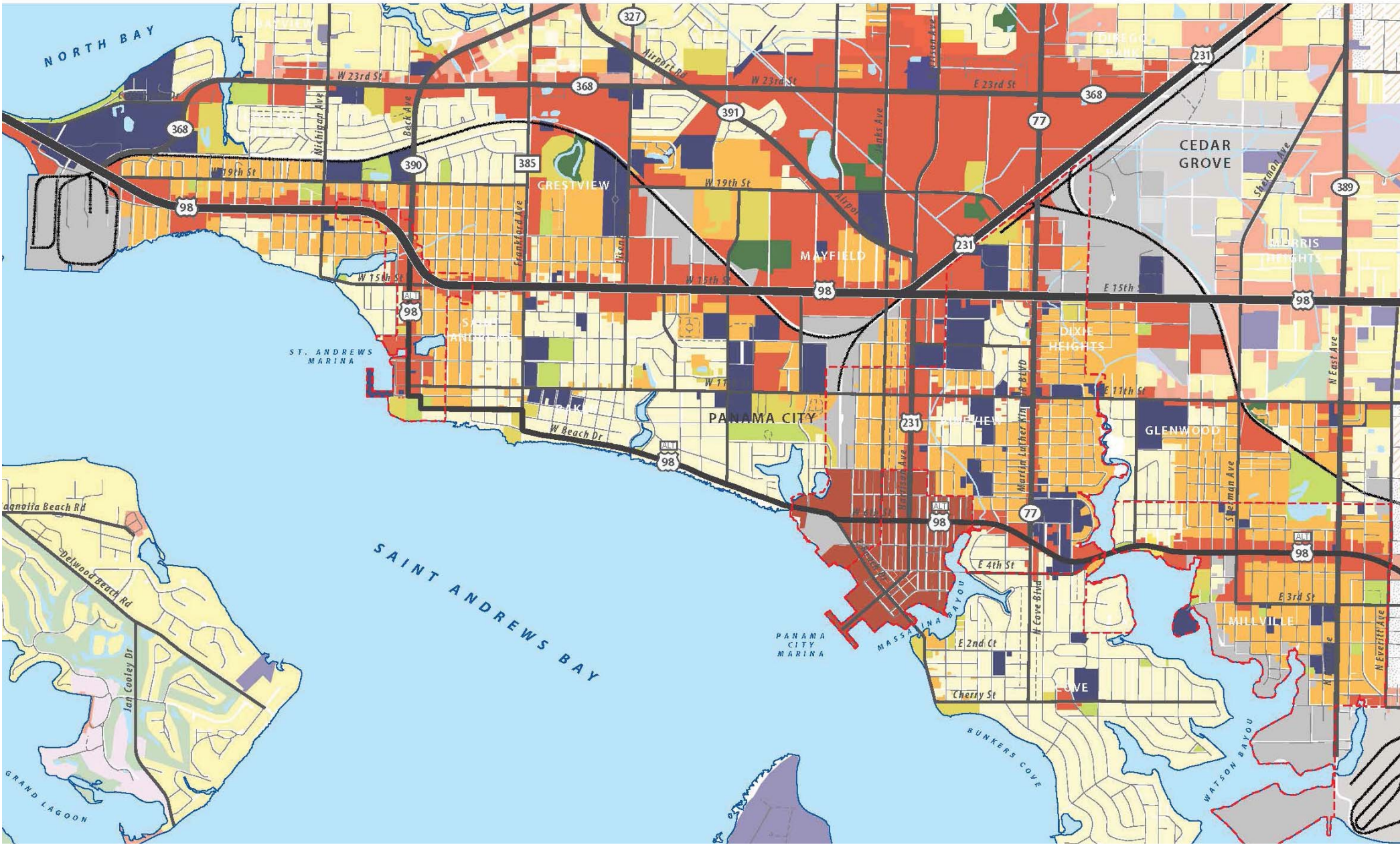




Current Land Use Map

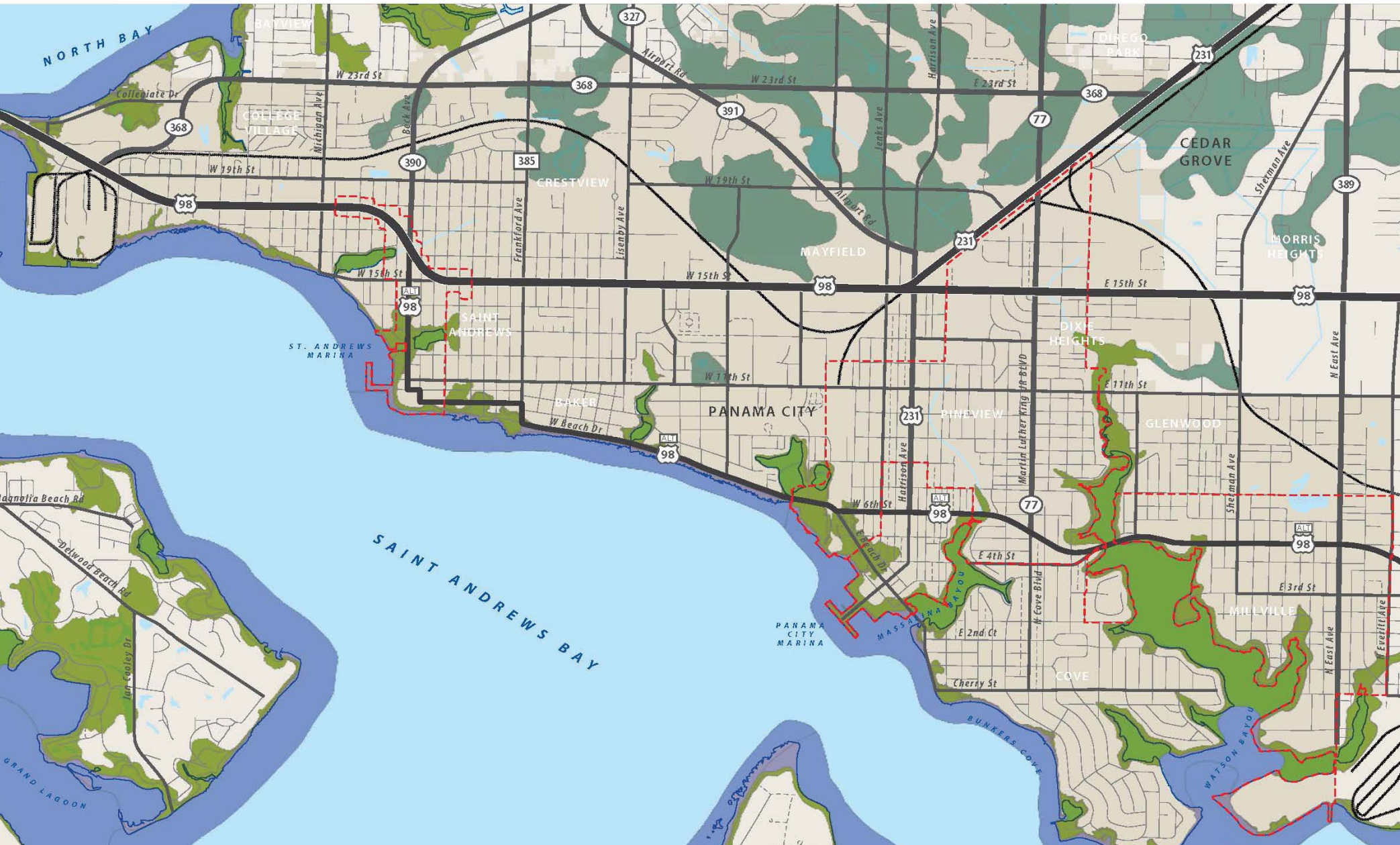






Future Land Use Map

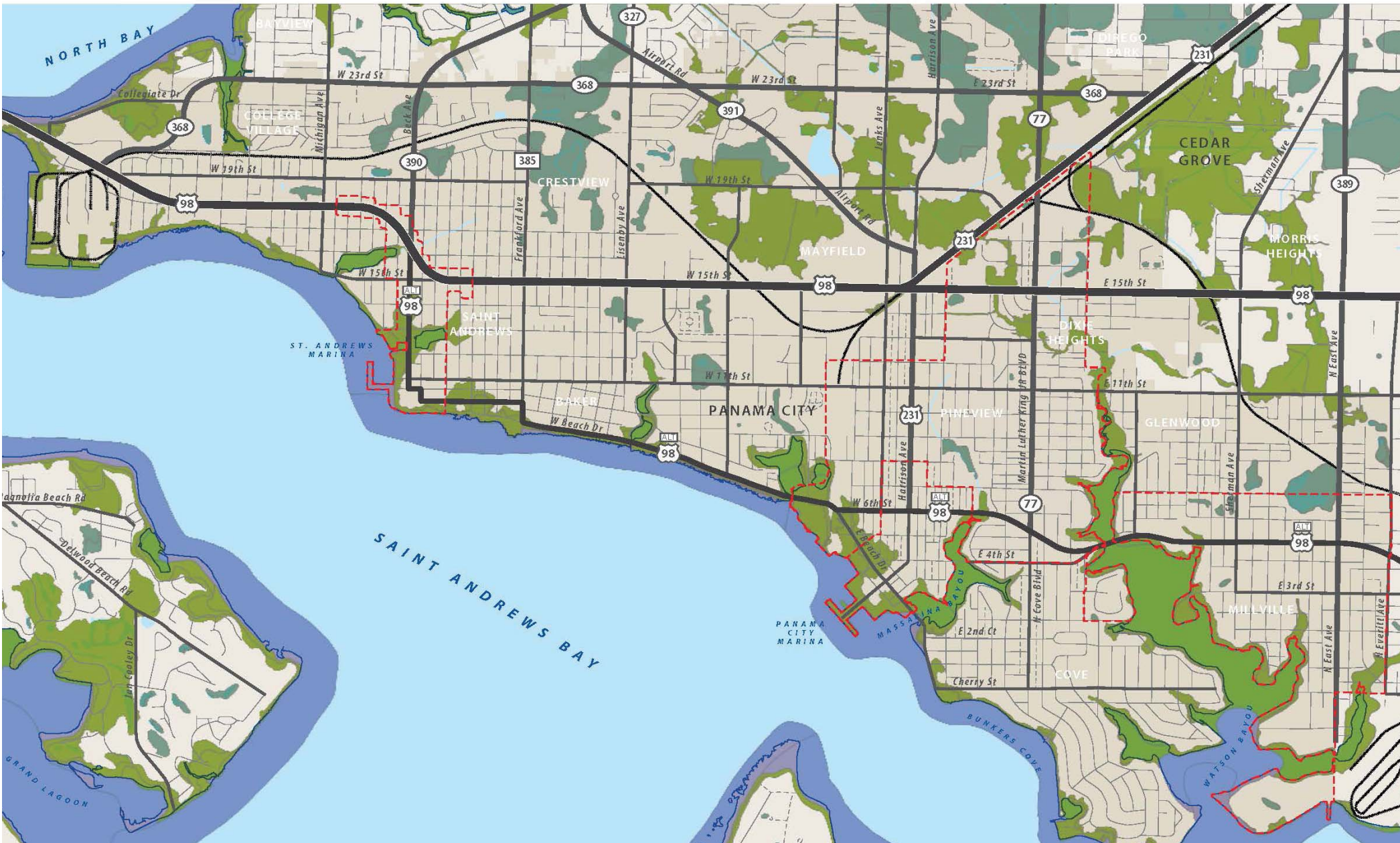




FEMA FIRM Map - 2002

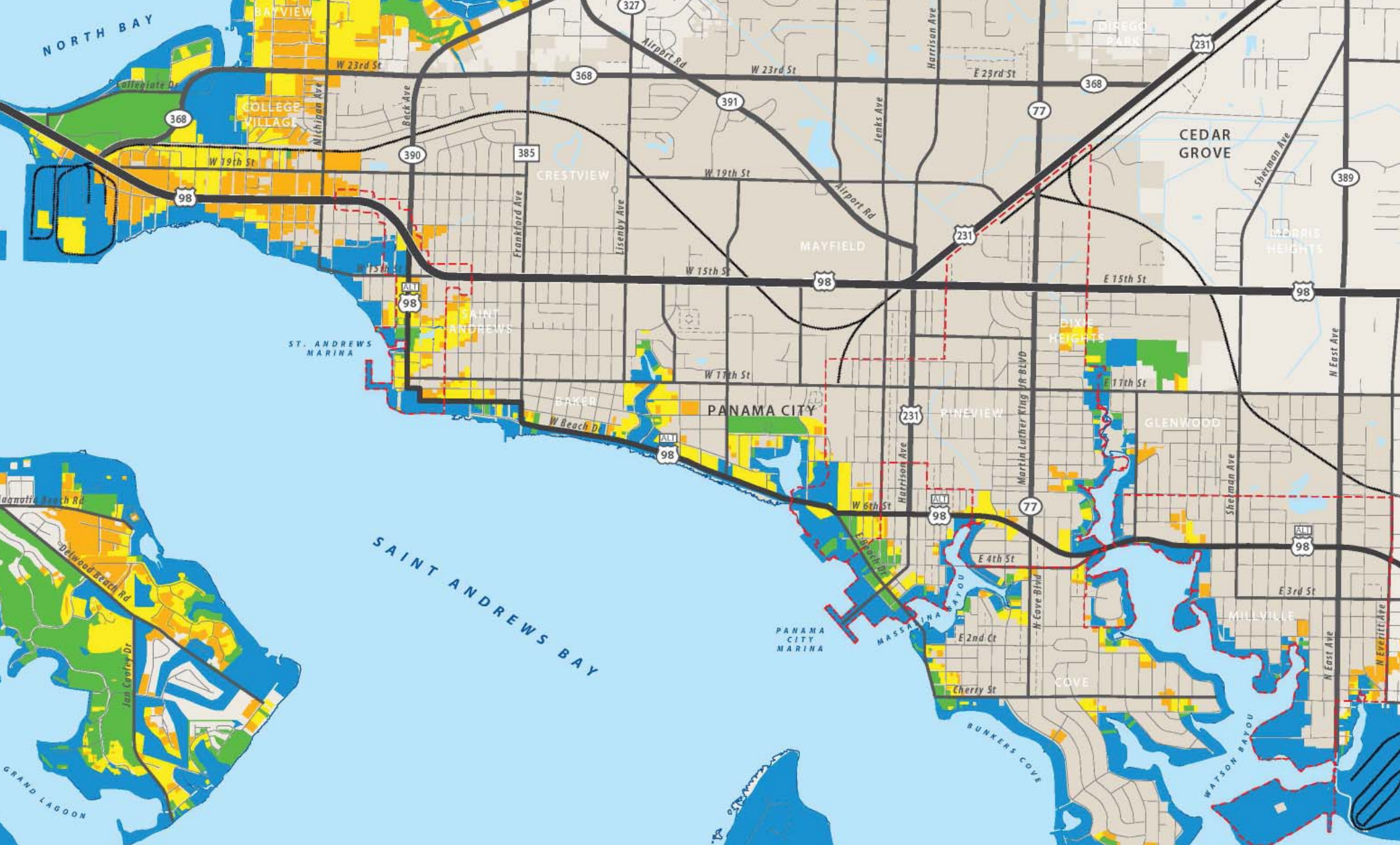






FEMA FIRM Map - 2009

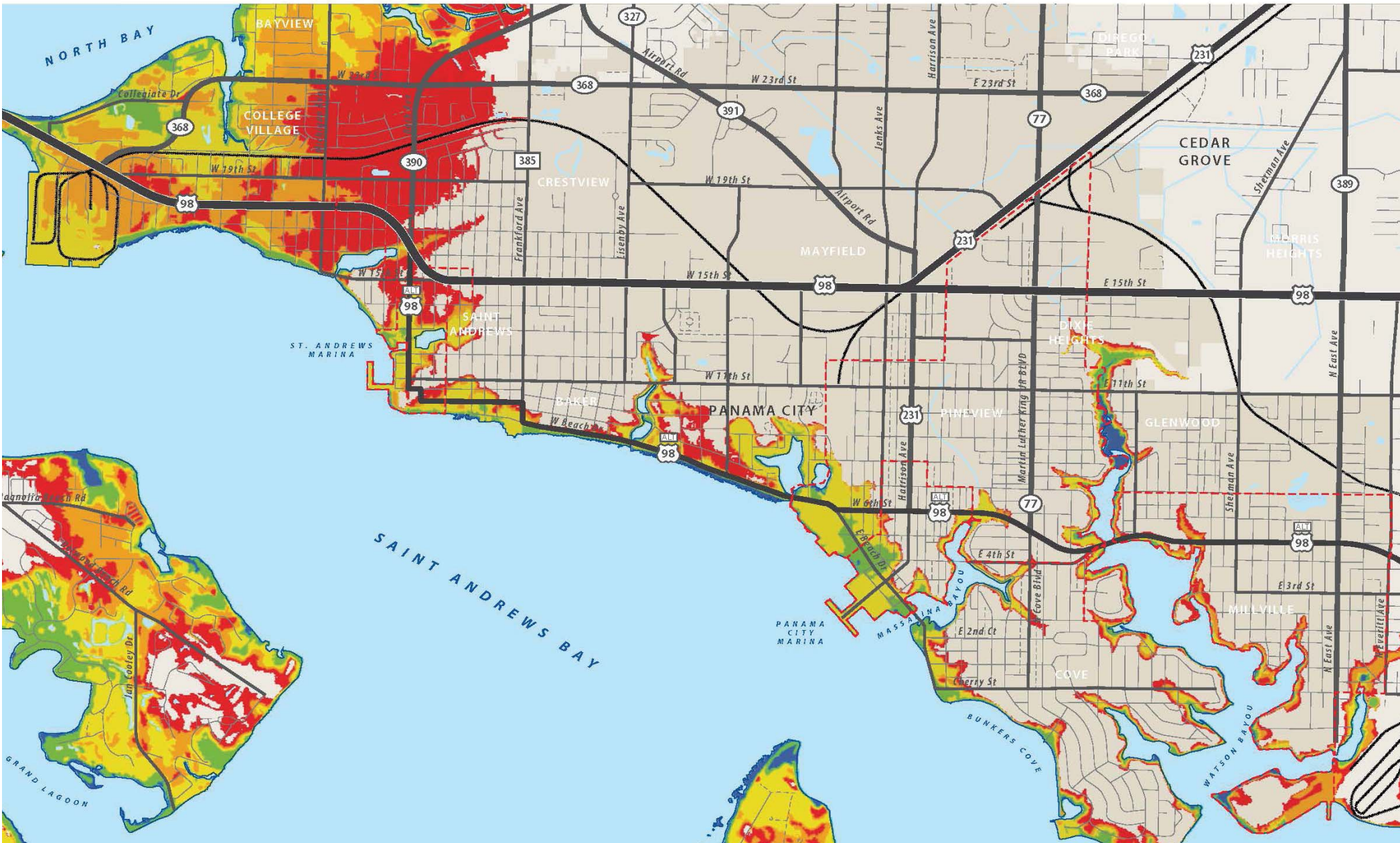




Evacuation Zone Map

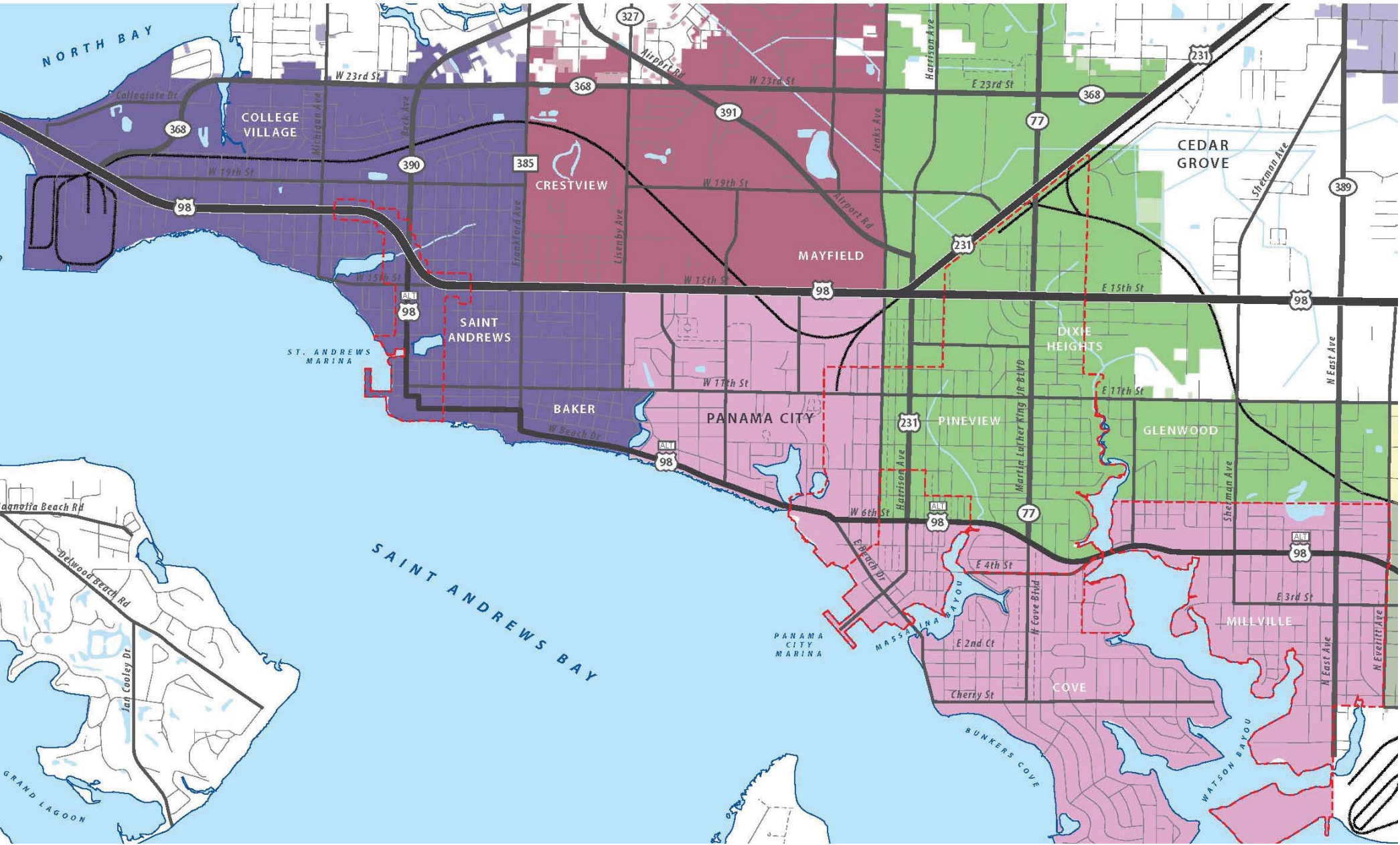






Storm Surge Map

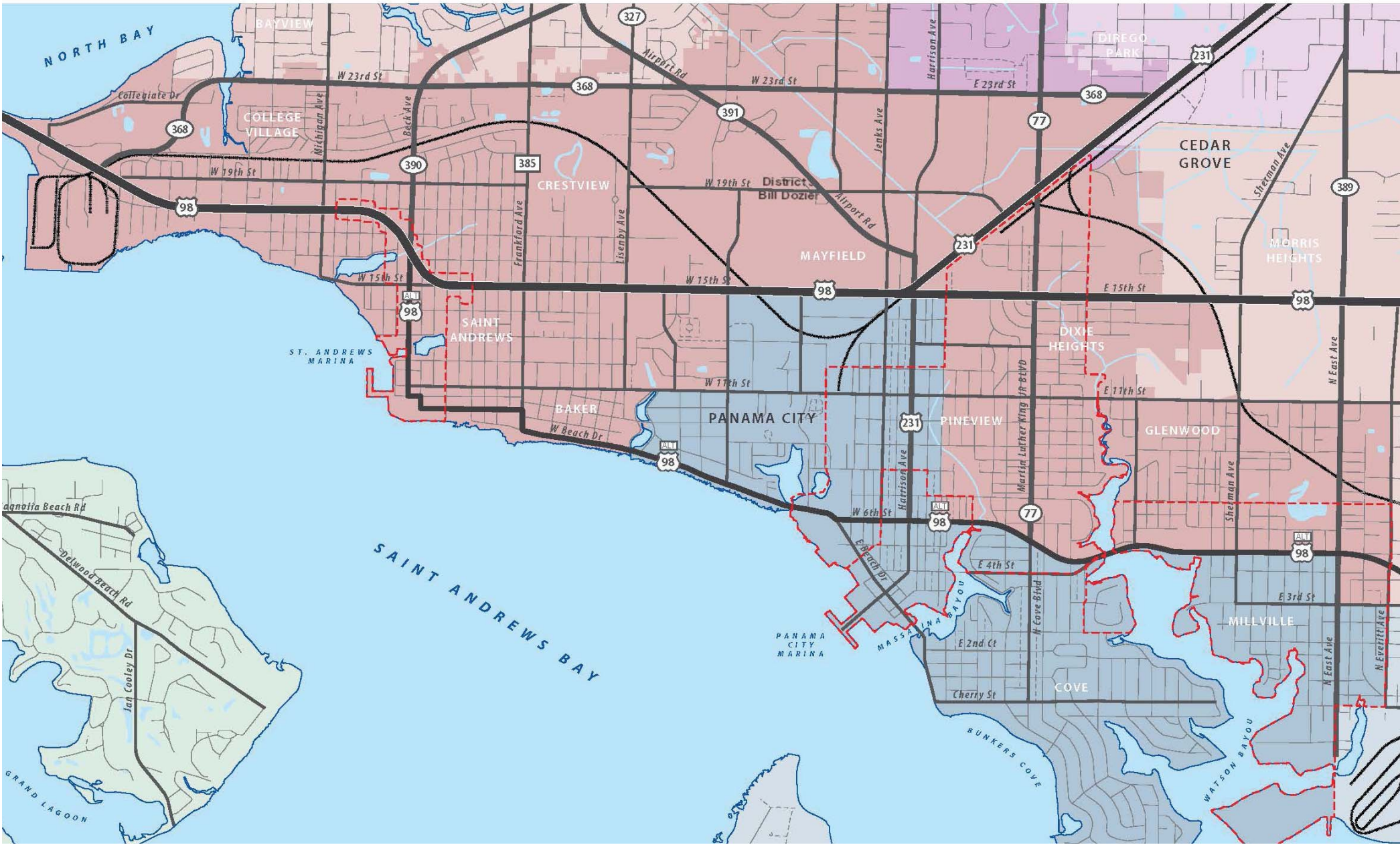




Wards Map







County Commissioner District Map