



Strategic Plan 2020
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Overview

The Bay County Tourist Development Council (TDC) has produced this strategic plan for Panama City Beach to provide a vision for destination growth, development and marketing in the years leading up to 2020. This plan was developed with participation from a wide array of Panama City Beach business, community and elected officials as well as citizens-at-large utilizing online surveys, interviews and community input sessions.

Workforce development issues were raised during the development of this plan. Though important, the TDC felt other organizations were better positioned to execute these strategies. The TDC will collaborate with these organizations, including the Workforce Center, Gulf Coast State College, Florida State University – Panama City, the Economic Development Alliance and local chambers of commerce.

The facilitated planning process was conducted during the period of March through August 2012. The plan updates and replaces the Strategic Plan that was adopted in September 2008.

Background and History

Panama City Beach, with its sugar white sands, emerald green waters, and temperate climate, has long been recognized as one of Northwest Florida's most popular vacation destinations. The strong demand comes from families, college students on spring break, sports enthusiasts, and retirees from the upper Midwest and Canada.

In the early days, the beach attracted visitors from regional markets to the local, small, family-owned and operated hotels, motels and cottages, even through today. During the 70s and 80s, the tourism industry continued to develop with newer, more modern hotels, motels and condominiums. The expanded product and demand of the industry to attract more visitors annually required a much more aggressive approach to tourism promotion.

In 1986, the Bed Tax Referendum passed and the Bay County Tourist Development Council (TDC) was formed. In 1998, the Panama City Beach Convention and Visitors Bureau (CVB) was formed, and contracted with the TDC to perform tourism promotion, and the contract remains the same today.

In 1998, Panama City Beach embarked on a highly successful beach renourishment program. The initial project, with subsequent projects in 2005 and 2011, significantly widened and raised the beach which not only helped protect the beach from storm events, but has increased the marketing value of the destination.

In the decade following 1998, the resort destination experienced overwhelming growth in new development of hotels, condominiums, restaurants and Pier Park. The opening of the new Northwest Florida Beaches International Airport in 2010 is symbolic of a destination that is forging a new destiny through forward thinking, planning and development.

Frank Brown Park, the City's premier sports facility, experienced a massive renovation and expansion from 1998-2005 on the 200+ acre site. This included the addition of more baseball/softball fields, soccer and multi-purpose fields, tennis courts, outdoor basketball courts, Miracle League cushioned handicap field, walking trail, 20-acre festival site and an aquatic center with Olympic size pool. The renovation and expansion opened a new market (sports) that today is nationally known for its championship caliber events.



Beginning in 2008, the destination faced a series of external threats including a spike in gasoline prices, the meltdown of the real estate industry and the Great Recession of 2009. Through these difficult times, the local tourism industry bucked the regional, statewide and national trends by posting year over year growth in revenues. Additionally, Panama City Beach's marketing efforts were enhanced through an increase in the tourist development tax rate. The additional revenues generated allowed Panama City Beach to invest an additional million dollars in advertising at the time other destinations were slashing marketing budgets. Panama City Beach posted an increase of 2.0% in lodging revenues while the Northwest Florida region fell by 5.2%.

The Deepwater Horizon Oil Spill, during the summer of 2010, was clearly the single most dramatic threat to Northwest Florida's economy with its devastating impacts to tourism and commercial fishing.

Through the darkest days of the spill in June and July of 2010, our greatest threat was uncertainty and public misperception as to the actual environmental impacts on the beach. A resolute and loyal visitor base, as well as strong support from the organizers of Panama City Beach's summer sports tournaments, saw the destination through the crisis without dramatic drops in visitation. While Panama City Beach comprises over 25% of Northwest Florida's tourism economy, PCB only suffered 15% of the total regional loss resulting from the spill.

In the end, Panama City Beach narrowly escaped most of the environmental impacts of the spill. The heavy, liquid product was within seven miles of the beach, when a shift in the wind and the tides pushed the visible oil away from the beach and ultimately dispersed it.

Throughout the spill and during 2011, BP provided marketing grants to Panama City Beach and the other tourist destinations along the Gulf Coast to help speed economic recovery. These grants helped Panama City Beach recapture some of the momentum built immediately prior to the oil spill, resulting in record-breaking years during 2011 and 2012. However, a delta remains between these economic results and where the destination should have been but for the oil spill.

The passage of the RESTORE Act in July 2012 may provide an unprecedented opportunity for Panama City Beach to further strengthen and diversify its tourism economy, as well as enhance the region's environment. One of the TDC's primary goals going forward from 2012 will be to ensure the local tourism industry reaps benefits from this landmark legislation.

Competitive Landscape

Panama City Beach is located on the central Florida panhandle coastline of the Gulf of Mexico amid many beach destinations that market themselves aggressively.

Vacation/Getaway Markets

- Destin, FL
- Pensacola, FL
- Gulf Shores, AL
- Orlando, FL
- Daytona Beach, FL
- Myrtle Beach, SC
- Key West, FL

Winter Resident/Snowbird

- Destinations listed above
- Sarasota, FL
- St. Pete Beach, FL
- Arizona
- Ft. Lauderdale, FL

Spring Break

- Daytona Beach, FL
- South Padre Island, TX
- Western Ski Resorts
- Lake Havasu, AZ
- Cancun, Mexico

Amateur Athletics/Team Sports

- Orlando, FL
- Lee County, FL
- Chattanooga, TN
- Pensacola, FL
- Gulf Shores/Orange Beach, AL
- Polk County, FL
- Myrtle Beach, SC
- Columbus, GA
- Tallahassee, FL
- Birmingham, AL





Mission Statement

The Panama City Beach Convention and Visitors Bureau and the Bay County Tourist Development Council will promote a positive image for Panama City Beach, increase tourism, and coordinate the marketing efforts of the total tourism community.

Brand Position

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

Vision Statement

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

Core Values

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

Vision of Panama City Beach in 2020

- Maintain our place as the “World’s Most Beautiful Beaches.”
- Maintain high visitor occupancy while not exceeding the destination’s carrying capacity.
- Continued diversification of our tourism product to create additional demand.
 - New sports and event venues designed to drive increased destination appeal in the shoulder and off-seasons while discouraging increased road traffic in peak visitation periods.
 - Increased ecotourism and nature-based recreation access to the St. Andrew Bay and the Gulf of Mexico.
 - Development of additional attractions, cultural & heritage resources and other tourism amenities.
- Enhance primary gateways that welcome visitors, create a sense of place, deliver the brand message, and direct first-time visitors to the visitor center (US-98 Phillips Inlet Bridge, US-98 Hathaway Bridge, FL-79 Buchanan West Bay Bridge).
- Consistent directional signage throughout the destination.
- Continue CRA infrastructure improvements to move traffic efficiently; provide safety for pedestrians; encourage walking, cycling; reduce vehicular traffic; improved curb appeal for a more attractive destination. The installation of curbing, wide sidewalks, turning lanes, bike lanes, lighting, pedestrian bridges, signage and coastal landscaping, will instill a sense of pride and safety among residents and visitors alike.
- Redevelopment of abandoned and dilapidated property in core visitor areas.
- Consistent visitor occupancy in the 55% to 85% range year-round.

Strategic Initiatives

1. Preserve and enhance the beach, the most important natural resource of Panama City Beach.

- a. Preserve and protect the water, sand, dunes and access paths.
 - i. Ensure that all sand added to the beach through renourishment activities is similar in color and composition to the existing sand on the beach.
 - ii. Maintain existing and conduct additional dune vegetation projects to encourage and enhance the development of sand dunes along the length of the beach.
- b. Work with local, state and federal agencies to secure permits necessary to conduct future beach renourishment activities.
- c. Increase awareness of the beach and near-shore areas as wildlife habitat for sea turtles, shorebirds, etc.
- d. Enhance and improve trash removal and beach maintenance activities.
 - i. Investigate trash receptacles to replace the existing cans that provide the same function that are more visually pleasing.
 - ii. Develop an Adopt-A-Beach program to encourage partner and stakeholder support for beach maintenance and protection.
 - iii. Discourage littering of all types, including glass bottles and cigarette butts on the beach and beach access points.
- e. Public Information – Beach & Surf Conditions
 - i. Create materials to educate travelers about beach and surf conditions, including surf conditions, Leave No Trace Ordinances (signs, maps, website, guides, in-room video).
 - ii. Enhance Beach & Surf Patrols to increase public awareness of surf conditions, rip currents, Leave No Trace Ordinances and other issues of importance to beach goers.
- f. RESTORE Act/NRDA
 - i. Work with Bay County and local stakeholders on environmental enhancement and restoration projects that benefit Panama City Beach, St. Andrew Bay and the Gulf of Mexico.

SUCCESS IN 2020:

- High visitor and resident satisfaction scores
- Continued awards and accolades
- Increased wildlife and natural areas
- Increased diving reefs accessible from beach
- Funding for RESTORE projects that benefit local environmental restoration

2. Enhance the visitor experience.

- a. Deliver on the destination brand – “Real. Fun. Beach.” Most aspects of the Panama City Beach community should enhance a family vacation experience.
- b. Collaborate with local governments and community leaders on policies that enhance the perception of Panama City Beach as a hospitable, safe, fun, beautiful vacation destination.
- c. Enhance local transportation systems to ease visitors travel to and throughout the destination.
 - i. Gateways that deliver on the brand, welcome and direct travelers to information.
 - ii. Directional signage – keep visitors moving efficiently through the community.
 - iii. Road infrastructure and traffic enhancements – move traffic efficiently while protecting the safety of pedestrians and cyclists.
 - iv. Landscaping & beautification – a well maintained coastal landscape will inspire pride and better visitor behavior.
- d. Encourage the redevelopment of abandoned and condemned real estate in primary visitor beach front locations. Improve curb appeal, add new activities/businesses, improved safety.
- e. Improve and expand on family attractions and outdoor experiences that complement the brand.

SUCCESS IN 2020:

- High visitor and resident satisfaction scores
- New gateways & directional signage
- New streetscape with curbs, sidewalks and coastal landscaping throughout beachfront area
- New and improved attractions and activities
- Increased bicycle and non-vehicular usage
- Increased year-round visitation and improved traffic and parking



3. Develop and market Panama City Beach as a year-round destination.

- a. Expanded and targeted research-based marketing program.
 - i. Establish marketing priorities by season: Summer, Fall, Winter, Spring.
 - ii. Partner with airlines to drive increased fly-in visitation from target markets.
- b. Programming of events in shoulder and off-season.
 - i. Festivals and concert events.
- c. Expanded team sports and group sales initiatives emphasizing events during slower occupancy periods.
- d. Build on fun elements in brand by promoting celebrations of holidays, birthdays, anniversaries, weddings, reunions, etc., to attract families and groups.
- e. Feature ecotourism opportunities, including sea kayaking and snorkeling/diving as unique reasons to visit Panama City Beach that go beyond the traditional beach experience.
- f. Encourage the redevelopment of existing attractions and the addition of complementary attractions.

SUCCESS IN 2020:

- Increased year-round visitation with less dependence on peak periods to level the monthly visitation trends
- Increased family and adult visitation
- Increased airport traffic
- PCB recognized as a top destination for celebrations

4. Enhance and develop public venues to generate additional visitor demand.

- a. Sports Facilities
 - i. Expand amateur athletic fields for softball, baseball at Frank Brown Park or new facility.
 - ii. Develop rectangular fields for soccer, lacrosse, field hockey and other field sports.
 - iii. Develop multi-purpose facility to host sports tournaments, concert events, exhibitions, boat shows and social events.
- b. Utilization of Improvements to Aaron Bessant Park
 - i. Work with the City and other stakeholders on events – concerts, festivals, theatrical performances, and athletic tournaments – in Aaron Bessant Park that will drive incremental visitation to Panama City Beach.
- c. Encourage development of ecotourism opportunities on West Bay, as well as the Gulf of Mexico, including but not limited to:
 - i. Non-motorized boat ramps.
 - ii. A series of artificial reef systems for snorkeling, diving and fishing.
- d. Work with local, state and regional stakeholders to encourage the further diversification of Panama City Beach's tourism economy and environmental restoration through RESTORE Act and NRDA investments.

SUCCESS IN 2020:

- Outdoor concert facility hosting regular family-friendly entertainment events
- Outdoor sports fields hosting regular tournaments that bring large groups of overnight visitors
- Indoor multi-purpose facility hosting regular events that bring large numbers of overnight visitors
- New and revitalized attractions that make PCB the choice destination for families seeking a fun beach vacation/getaway



Bay County TDC and Panama City Beach CVB Organization Structure

Marketing and managing a large destination requires a highly skilled team effort. In order to deliver upon the strategic initiatives outlined in this document the TDC/CVB staff will need to be expanded in order to achieve maximum efficiency and return on investment. The staff organizational structure will be reviewed each year as part of the annual planning process.

Acknowledgements

This plan was developed during the Spring/Summer of 2012 with extensive input from industry stakeholders, the TDC/CVB Board of Directors (Gary Walsingham, Chairman), TDC/CVB Staff (Dan Rowe, Executive Director/President), and Berkeley Young, President of Young Strategies.



