

The Klages Group

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**First Quarter 2008 Visitor Profile
Panama City Beach Convention & Visitors Bureau**



P A N A M A C I T Y B E A C H



Prepared for:

Panama City Beach Convention and Visitors Bureau

Prepared by:

Walter J. Klages, Ph.D.
President

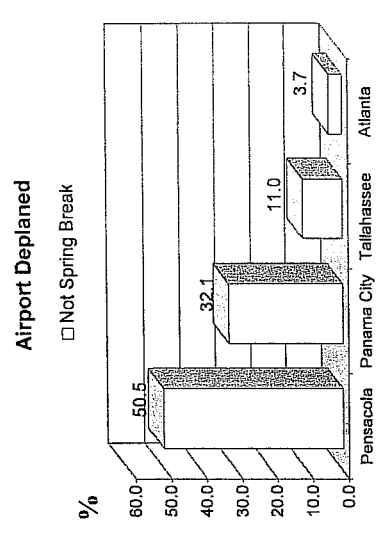
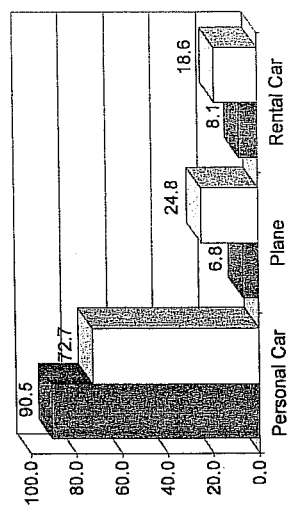
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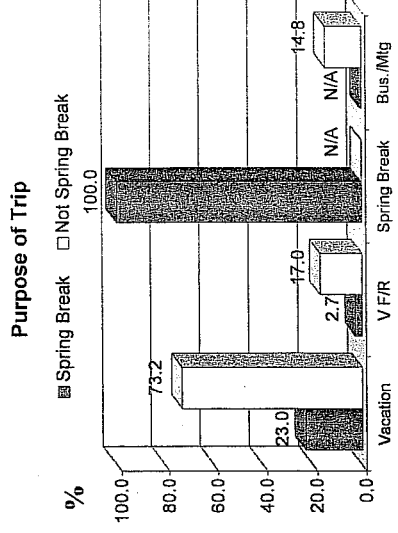
May 2008

First Quarter 2008 Visitor Profile -- Panama City Beach Convention & Visitors Bureau

	<u>Oct.-Dec. '07</u>	<u>Jan.-Mar. '08</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Transportation Mode (Multiple Response)				
Personal Car/RV	77.7%	75.3%	90.5%	72.7%
Plane	20.2	22.2	6.8	24.8
Rental Car	15.5	17.1	8.1	18.6
Airport Deplanned (Base: Flew)				
Pensacola	43.0%	49.6%	N/A	50.5%
Panama City	37.2	32.2	N/A	32.1
Tallahassee	10.5	11.3	N/A	11.0
Atlanta	6.1	4.3	N/A	3.7



	<u>Oct.-Dec. '07</u>	<u>Jan.-Mar. '08</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Purpose of Trip (Multiple Response)				
Vacation	78.5%	66.0%	23.0%	73.2%
Visit Friends/Relatives	21.0	15.0	2.7	17.0
Spring Break	N/A	14.4	100.0	N/A
Business/Meeting/Conference	14.6	12.6	N/A	14.8

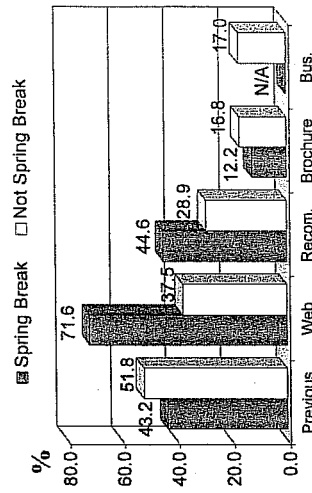


	<u>Oct.-Dec. '07</u>	<u>Jan.-Mar. '08</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
First Visit to (% yes)				
Panama City Beach	37.0%	45.1%	51.4%	44.1%
Florida	6.3	5.8	6.8	5.7
Average Length of Time Since Last Visit to PCB (months) (Base: Repeat Visitors)	13.5	16.0	14.9	16.1

First Quarter 2008 Visitor Profile -- Panama City Beach Convention & Visitors Bureau

	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Information Sources (Multiple Response)				
Previous Visit	54.4%	50.6%	43.2%	51.8%
Internet	41.8	42.4	71.6	37.5
Recommendation by Friend/Relative	26.9	31.1	44.6	28.9
Brochures	17.0	16.1	12.2	16.8
Business	13.3	14.6	N/A	17.0
Vacation/Travel Guides	24.7	12.5	14.9	12.0
Travel Agent	10.7	10.3	6.8	10.9
Convention and Visitors Bureau	6.4	5.4	5.4	5.5

Information Sources (Top Five)



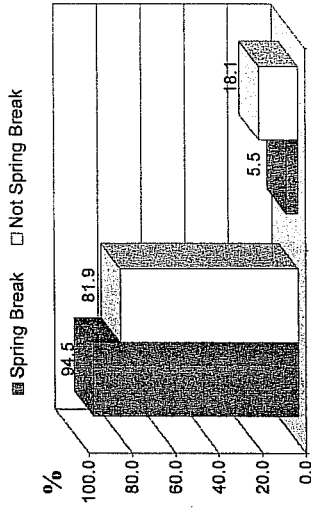
	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Reservations				
Before Arriving in Area	89.4%	83.8%	94.5%	81.9%
None	10.6	16.2	5.5	18.1

How Made Lodging Reservations for Stay

(Base: Had Reservations)

	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Direct Call to Hotel	37.7%	33.3%	25.0%	34.9%
Other Internet Travel Site	24.2	24.9	44.1	21.1
Specific Hotel/Condo Website	21.0	20.3	14.7	21.4
Travel Agent	12.4	13.2	5.9	14.6

Reservations

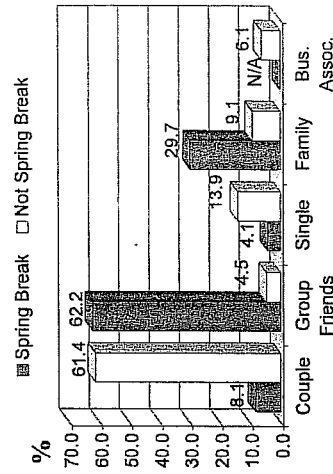


	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Length of Stay (days)				
Away from Home	11.1	9.4	7.6	9.8
In Panama City Beach	8.2	5.6	5.5	5.6

Party Size (Immediate Travel Party)

	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Couple	41.3%	53.7%	8.1%	61.4%
Group of Friends	8.7	12.8	62.2	4.5
Single	13.0	12.5	4.1	13.9
Family	27.5	12.1	29.7	9.1
With Business Associates	4.5	5.3	N/A	6.1
Group of Couples	4.7	3.5	1.4	3.9
Extended Family	3.9	2.3	4.1	2.0

Party Composition

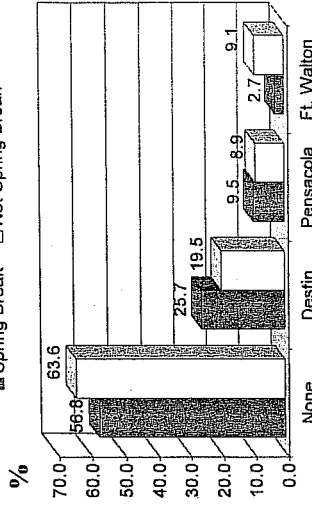


Traveling with Children/Young Adults

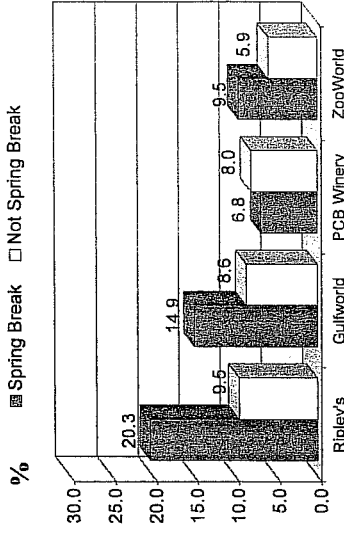
	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Yes	27.3%	21.4%	83.8%	10.9%
No	72.7	78.6	16.2	89.1

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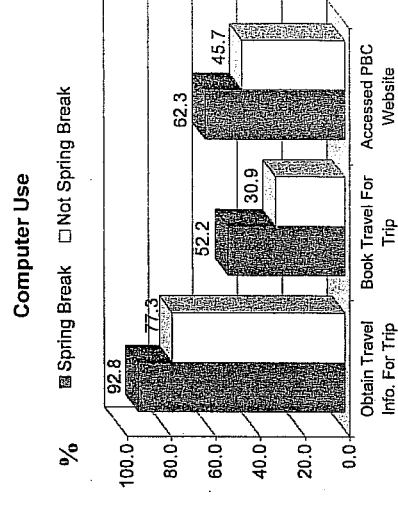
	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Other Panhandle Destinations Considered <i>(Multiple Response)</i>				
None	62.8%	62.6%	56.8%	63.6%
Destin	26.1	20.4	25.7	19.5
Pensacola	8.9	8.9	9.5	8.9
Fort Walton Beach	7.2	8.2	2.7	9.1
Attractions Visited <i>(Multiple Response)</i>				
Ripley's Believe It or Not	14.0%	11.1%	20.3%	9.5%
Gulfworld Marine Park	11.9	9.5	14.9	8.6
Panama City Beach Winery	6.2	7.8	6.8	8.0
ZooWorld	5.9	6.4	9.5	5.9
None	68.9	75.3	59.5	78.0



Attractions Visited (Top Four)



	Oct.-Dec. '07 <u>Total</u>	Jan.-Mar. '08 <u>Total</u>	<u>Spr. Break</u>	<u>Not Spr. Break</u>
Seek Out Travel Information On-Line	74.7%	75.1%	93.2%	72.0%
Used the Internet to Gather Travel Information for this Trip <i>(BASE: Those who Seek Travel Info On-Line)</i>	79.7%	80.1%	92.8%	77.3%
Booked Reservations for this Trip on the Internet <i>(BASE: Those who Seek Travel Info On-Line)</i>	35.9%	34.7%	52.2%	30.9%
Accessed www.thebeachloversbeach.com <i>(BASE: Those who Seek Travel Info On-Line)</i>	44.2%	48.7%	62.3%	45.7%



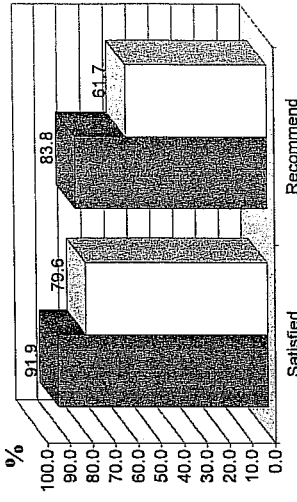
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	Oct.-Dec. '07	Jan.-Mar. '08	Not
	Total	Total	Spr. Break

Satisfaction with Panama City Beach

Very Satisfied	62.8%	60.0%	58.0%
Satisfied	24.6	21.4	21.6
Satisfaction Level	87.4%	81.4%	79.6%

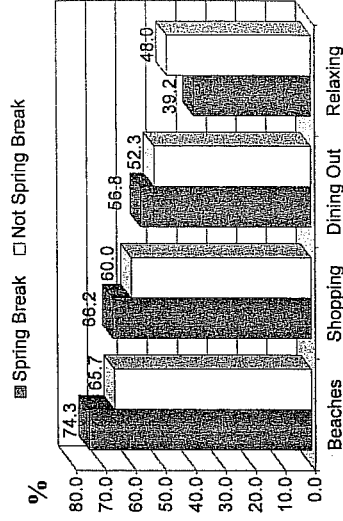
Satisfaction/Recommend Panama City Beach



Activities Enjoyed in Panama City Beach

	Oct.-Dec. '07	Jan.-Mar. '08	Not
	Total	Total	Spr. Break
<i>(Multiple Response)</i>			
Beaches	70.8%	66.9%	65.7%
Shopping	42.2	60.9	60.0
Dining Out	63.4	52.9	52.3
Relaxing	57.9	46.7	48.0
Walking on the Beach	67.0	41.2	40.2
Sight Seeing	41.0	30.7	32.0
Golfing	17.9	21.0	22.3
Fishing	24.5	16.3	17.7
Swimming	26.5	14.4	11.1
Visiting Friends/Relatives	18.8	12.8	14.3
Pool/Hot Tub	25.0	12.6	11.8
Wildlife/Environment	10.9	12.5	13.9
Bicycle Riding	14.4	11.9	11.4
Bars/Night Life	11.8	11.5	8.4
Photography	13.9	8.4	8.9

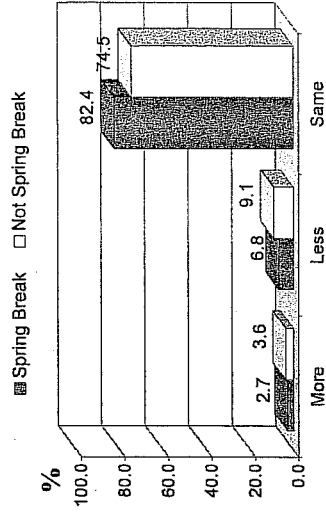
Activities Enjoyed (Top Four)



Expense Relative to Expectations

	Oct.-Dec. '07	Jan.-Mar. '08	Not
	Total	Total	Spr. Break
More Expensive	5.7%	3.5%	3.6%
Less Expensive	10.1	8.8	9.1
As Expected	77.2	75.7	74.5
Don't Know	6.9	12.1	12.7

Expense Relative to Expectations



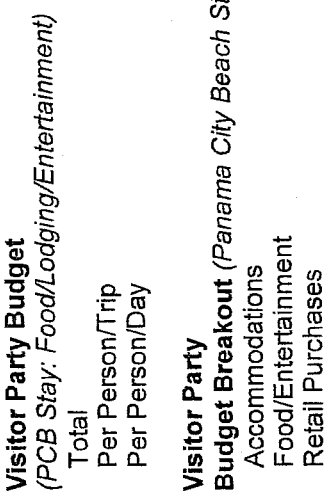
Recommend Panama City Beach

	Oct.-Dec. '07	Jan.-Mar. '08	Not
	Total	Total	Spr. Break
to Friends/Relatives (% yes)	78.3%	64.9%	61.7%
Plan to Return to Local Area (% yes)	79.9%	63.4%	59.5%

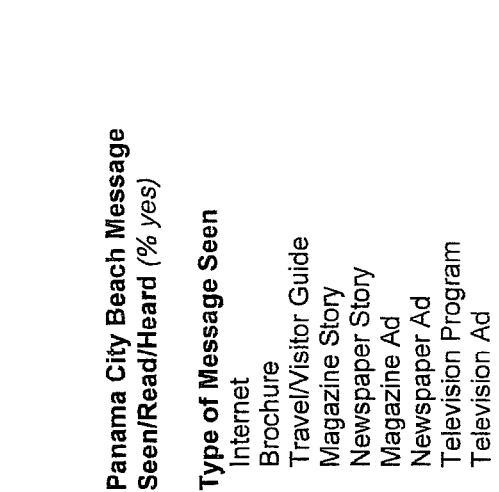
Plan to Return to Local Area (% yes)

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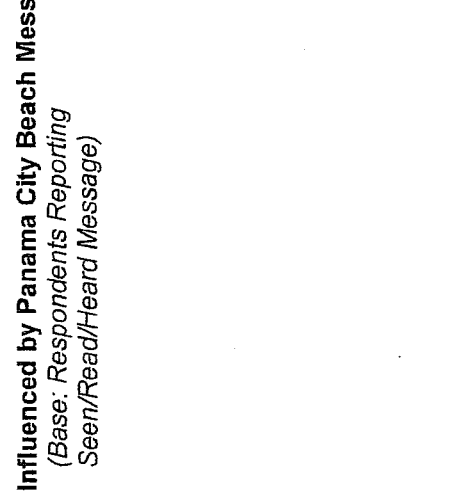
	Oct.-Dec. '07 Total	Jan.-Mar. '08 Total	Spr. Break	Not Spr. Break
Visitor Party Budget				
(PCB Stay: Food/Lodging/Entertainment)				
Total	\$1,409.32	\$1,380.74	\$1,081.28	\$1,438.82
Per Person/Trip	587.22	627.61	360.43	685.15
Per Person/Day	71.61	112.07	65.53	22.35
Visitor Party Budget Breakout				
(Panama City Beach Stay)				
Accommodations	\$650.08	\$630.15	\$529.95	\$648.72
Food/Entertainment	484.05	468.21	380.78	483.27
Retail Purchases	262.63	266.87	160.91	287.78



	Oct.-Dec. '07 Total	Jan.-Mar. '08 Total	Spr. Break	Not Spr. Break
Panama City Beach Message Seen/Read/Heard				
(% yes)				
Total	28.1%	30.0%	36.5%	28.9%
Internet	57.3%	66.2%	88.9%	61.4%
Brochure	31.0	34.4	29.6	35.4
Travel/Visitor Guide	28.7	26.0	14.8	28.3
Magazine Story	4.3	7.1	3.7	7.9
Newspaper Story	5.4	5.8	N/A	7.1
Magazine Ad	4.8	5.8	7.4	5.5
Newspaper Ad	4.5	3.9	N/A	4.7
Television Program	4.8	3.2	3.7	3.1
Television Ad	3.4	2.6	N/A	3.1



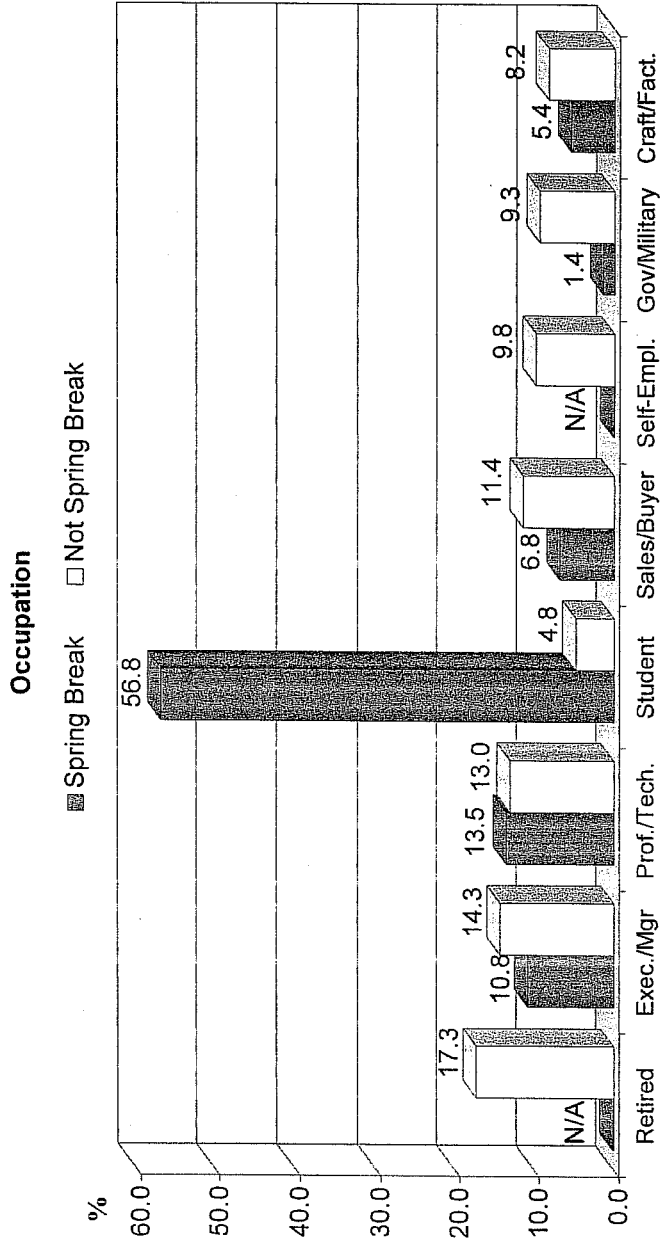
	Oct.-Dec. '07 Total	Jan.-Mar. '08 Total	Spr. Break	Not Spr. Break
Influenced by Panama City Beach Message				
(Base: Respondents Reporting Seen/Read/Heard Message)				
Total	42.4%	47.4%	51.9%	46.5%
Web	88.9	61.4	88.9	61.4
Brochure	29.6	14.8	29.6	14.8
TGAVG	55.4	28.3	55.4	28.3
Magazine Story	3.7	7.9	3.7	7.9



First Quarter 2008 Visitor Profile -- Panama City Beach Convention & Visitors Bureau

	Oct.-Dec. '07 Total	Jan.-Mar. '08 Total	Spring Break	Not Spring Break
Median Age Head of Household (years)	48.1	40.0	22.0	42.0
Median Annual Household Income *	\$76,632	\$72,250	\$30,000	\$78,235
Occupation				
Retired	18.1%	14.8%	N/A	17.3%
Executive/Managerial	16.5	13.8	10.8	14.3
Professional/Technical	18.5	13.0	13.5	13.0
Student	2.5	12.3	56.8	4.8
Salesman/Buyer	8.4	10.7	6.8	11.4
Self-Employed	7.9	8.4	N/A	9.8
Government/Military	7.6	8.2	1.4	9.3
Craft/Factory	10.1	7.8	5.4	8.2

* Please Note: Median Household Income Before Taxes

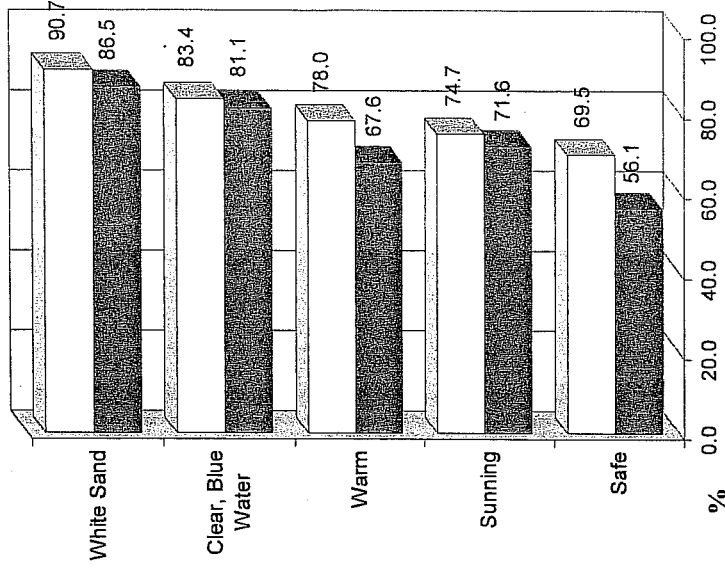


How Well Do You Think the Following Phrases Describe PCB?

	Oct.-Dec. 2007 <u>Total</u>	Jan.-Mar. 2008 <u>Total</u>	Spring <u>Break</u>	Not Spring <u>Break</u>
White Sand	92.0%	90.0%	86.5%	90.7%
Clear, Blue Water	82.1	83.0	81.1	83.4
Warm Weather	90.1	76.4	67.6	78.0
Sunning on the Beach	84.5	74.3	71.6	74.7
Safe Destination	85.4	67.6	56.1	69.5
Complete Relaxation	85.1	65.7	58.9	66.8
Affordable	74.5	57.5	53.4	58.3
Uncommercialized Beaches	61.7	53.8	54.8	53.6
Clean, Unspoiled Environment	56.1	53.1	43.3	54.7
I Can Drive There With My Family	65.3	48.1	53.3	47.2
Good Shopping Opportunities	40.0	46.1	63.6	43.2
Good Variety of Restaurants/Places to Dine	47.0	45.5	54.0	44.0
Upscale Accommodations	66.7	43.8	47.3	43.2
Reasonably Priced Lodging	72.8	43.6	41.9	43.9
Family Friendly	60.0	37.5	39.2	37.2
Good Golfing	35.3	34.6	23.0	36.6
Romantic Place	42.5	33.9	32.5	34.2
Too Much Traffic	30.2	32.2	56.7	28.2
Activities for All Ages	47.8	31.9	48.6	29.1
Very Safe Beaches for Children	43.6	29.3	51.3	25.6
Nightlife	36.0	28.4	54.1	24.1

Descriptive Phrases (Top Five)

Spring Break □ Not Spring Break



Panama City Beach Visitor Origins

Regional Visitor Distribution	Oct. - Dec. 2007	Jan. - Mar. 2008	Spring Break	Not Spring Break
Florida	6.8%	7.9%	13.7%	7.0%
Southeast	49.7	31.3	37.0	30.4
Northeast	3.5	8.8	1.4	10.0
Midwest	20.3	29.4	32.9	28.8
Southwest	6.9	9.3	11.0	9.1
Canada	6.1	6.2	N/A	7.2
Europe	3.6	3.3	1.4	3.6
Markets of Opportunity	3.1	3.8	2.6	3.9
Total	100.0%	100.0%	100.0%	100.0%

Total 2008 Regional Visitor Distribution

