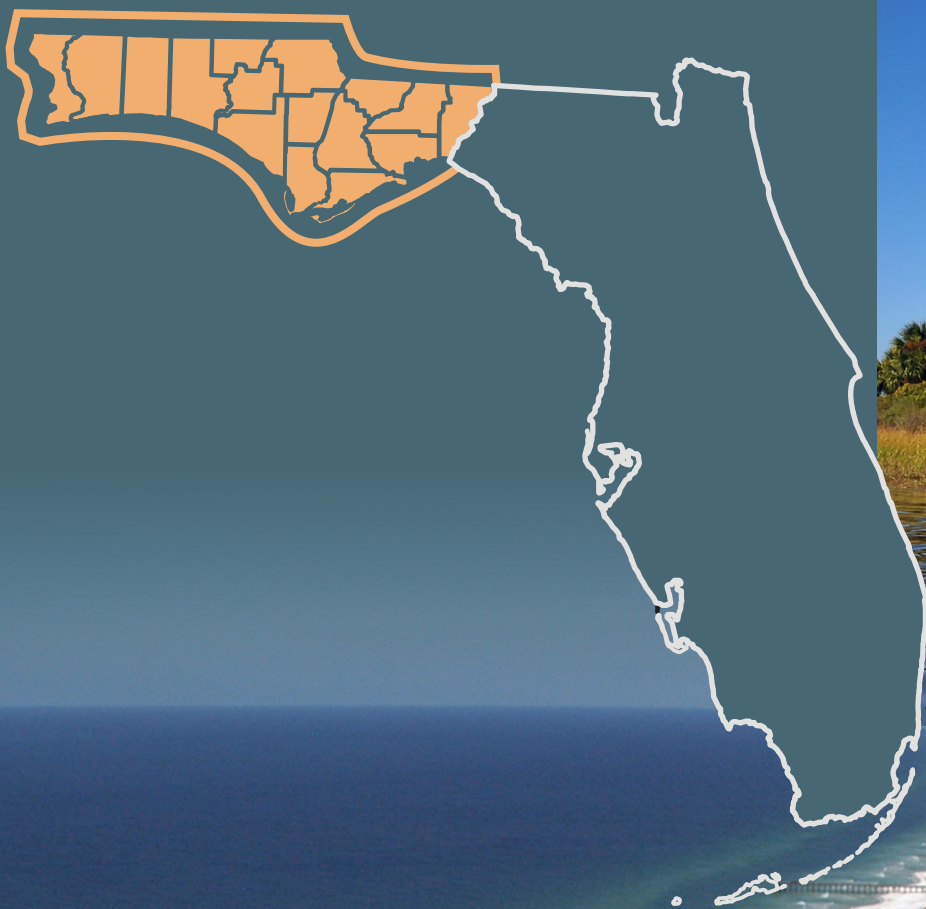


INVESTING IN THE FLORIDA PANHANDLE

OPPORTUNITIES AT THE INTERSECTION OF
NATURE, COMMERCE AND COMMUNITY



Developed by Skeo Solutions for U.S. Environmental Protection Agency Region 4 and the Superfund Redevelopment Program to support recovery in the region around Tyndall Air Force base following Hurricane Michael.

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TABLE OF CONTENTS

1

PURPOSE AND PARTNERS

3

ABOUT THE REGION

5

INVESTMENT INCENTIVES AND OPPORTUNITIES

7

REGIONAL RECREATION MAP

9

REGIONAL PROFILE

13

INVESTMENT COMMUNITIES

15

COMMUNITY INVESTMENT PROJECTS

27

REGIONAL INVESTMENT PROJECTS

33

LOOKING AHEAD



PURPOSE

This private-public sector prospectus highlights specific private investment opportunities that can support the Florida Panhandle region's vision for growing the recreation economy. Leveraging current and recent public investments in the recreation sector provides high growth potential for new businesses that can capitalize on near-term funding and partnership support at the regional, state, and federal levels.

Stakeholders from the cities, regional planning councils, federal and state agencies, and local organizations have worked together to identify potential residential, commercial, and mixed-use projects, as well as regional services, that present imminent opportunities for investment. Millions of dollars in public investment have paved the way with new and anticipated infrastructure for transportation, energy, and coastal and inland projects across the region. Rural Economic Development Areas designated at the state level and Opportunity Zones at the federal level are two programs dispersed across the region that support private sector funding, providing outdoor recreation entrepreneurs with incentives for working with public entities to enhance their investments in this area of lush, untapped recreation appeal. These projects can create a win-win for investors, communities, and visitors resulting in substantive financial returns, enhanced quality of life, and a vibrant, sustainable recreation economy.

KEY PARTNERS

The team sponsoring the Florida Panhandle Regional Recreation Economy Investment Prospectus is made up of representatives from all communities of interest, including mayors, city managers, and planners. In addition to the city leadership, a group of regional partners has stepped up to guide the vision for priority public and private investments. This group includes federal representatives, state and regional program leaders and environmental groups invested in a prosperous, sustainable and resilient future for the Florida Panhandle region.

CHATTAHOOCHEE

Robert Presnell, City Manager
rpresnell@chattahoocheefl.gov

Chattahoochee Main Street
Pam Medley, Board President
pfmedley@hotmail.com

GULF COUNTY

Gulf County
Tourist Development Council
Kelli Godwin, Executive Director
kelli@visitgulf.com

Keep Florida Beautiful
Jerrie Lindsey, Director
jerrie.lindsey@myfwc.com

JACKSON COUNTY

Jackson County
Tourist Development Council
Christy Andreasen, Executive
Director
andreasenc@jacksoncountyfl.gov

MEXICO BEACH

Douglas Baber,
City Administrator
d.baber@mexicobeachgov.com

PARKER

Andrew Kelly, Mayor
akelly@cityofparker.com

April Gibson, City Councilwomen
agibson@cityofparker.com

QUINCY

Rob Nixon, City Manager
rnixon@myquincy.net

SPRINGFIELD

Ralph Hammond, Mayor
rhammond@springfield.fl.gov

Jeannie Baldwin, Public Works
jbaldwin@springfield.fl.gov

REGIONAL PARTNERS

Apalachee Regional Planning Council

Ben Chandler | bchandler@arpc.org

Apalachicola Riverkeeper

Cameron Baxley | cameron@apalachicolariverkeeper.org

Emerald Coast Regional Council

Ada Clark | ada.clark@ecrc.org

Explore Northwest Florida

Betty Webb | bettytaylor.webb@gmail.com

Florida Department of Environmental Protection

Office of Greenways and Trails

Justin Baldwin | justin.baldwin@floridadep.gov

Florida's Great Northwest

Jennifer Conoley | jconoley@fgnw.org

North Star Legacy Communities

Dr. Sandra Thompson | sandra.thompson@famu.edu

Northwest Florida Water Management District

Darryl Boudreau | Darryl.Boudreau@nwfwater.com

Northwest Florida Sentinel Landscape

Kent Wimmer | Kwimmer@defenders.org

Riparian County Stakeholder Coalition

Ken Jones | ken@rlconsultants.net

U.S. Fish and Wildlife Service

Southeast Conservation Adaptation Strategy,

Louise Vaughn | louise_vaughn@fws.gov

U.S. Forest Service, Florida National Scenic Trail

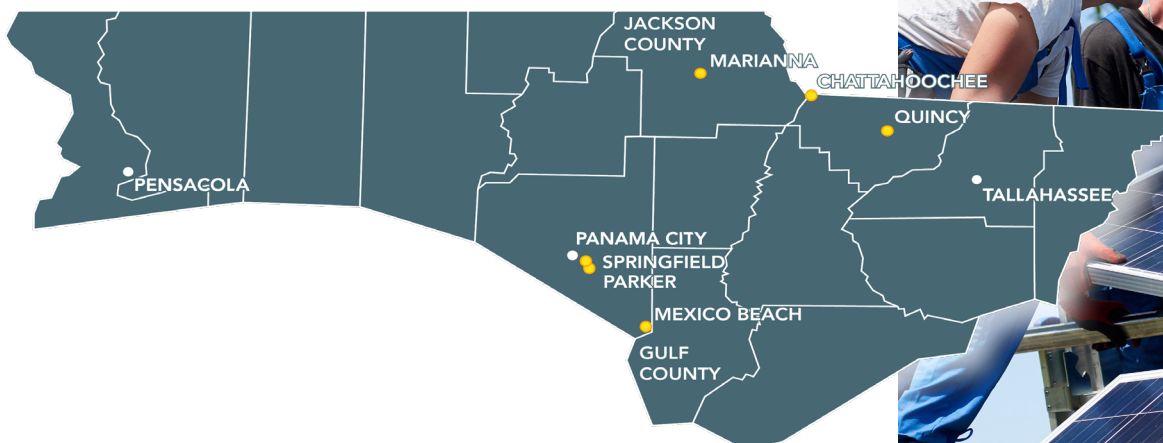
Shawn Thomas | shawn.c.thomas@usda.gov

U.S. EPA Region 4, Opportunity Zones Coordinator

L'Tonya Spencer | spencer.latonya@epa.gov

U.S. EPA Region 4, Sustainability Advisor

Rick Durbrow | durbrow.rick@epa.gov



ABOUT THE REGION

Outdoor recreation is a thriving economic sector of the State of Florida with recreation activities generating an estimated \$145 billion, including 1.2 million jobs, according to the 2019 State Comprehensive Outdoor Recreation Plan (SCORP). Restaurants, transportation and accommodations, gear and equipment, and fees are the top areas for resident and visitor recreation spending.

The Panhandle area generates \$7.5 billion in outdoor recreation-based spending annually. A growing tourism industry and new infrastructure investments in roads, parks, and trail networks position this unique area for economic growth in recreation-focused services and businesses. This prospectus identifies a range of private investment opportunities across the Panhandle that have the potential to support and benefit from the area's growing recreation economy.

\$ 1 4 5
BILLION
ECONOMY

1.2
MILLION
JOBS

REGIONAL INVESTMENT ASSETS

NEW AND PLANNED INFRASTRUCTURE

Millions of dollars have been invested in regional and local roads and bridges. New road projects like the Gulf Coast Parkway connect regional recreation assets with coastal towns. Significant investments in parks, coastline restoration, and the \$50 billion rebuild of Tyndall Air Force Base continue to attract residents and visitors to the region. The region is also positioned to implement significant enhancements to major river, lake, and trail systems through funding from the Bipartisan Infrastructure Law. The projects will bolster the environmental and economic resilience of the region's inland and coastal communities.

RECREATION VARIETY

The region includes a range of natural destinations including beaches, rivers, lakes, caves, and forests that offer a variety of recreation experiences. Extensive waterways and trail systems attract a growing base of recreation visitors. The cultural history provides unique opportunities to enhance visitor experiences and extend visitor days in the area, and the diversity of the landscape provides a variety of outdoor adventures across the Panhandle.

INVOLVED PARTNERS

Local, regional, state, and federal stakeholders, largely propelled by the long-term recovery response to Hurricane Michael in 2018, continue to collaborate on ideas and initiatives that support economic and ecological health.

AVAILABLE LAND BASE

A variety of properties are available in close proximity to recreation areas, including large tracts of land in inland areas along rivers and vacant or underutilized properties in commercial areas of coastal communities.



REGIONAL TRENDS

TOURISM GROWTH

The extended tourist season and surging demand for short term stays along the coast and inland riverfront areas signals the growing popularity of Northwest Florida's recreation assets. Tourist season for coastal communities in the region has extended from four months to year-round, and demand for short-term rentals in inland (freshwater) and coastal recreation areas continues to outpace supply. The need for lodging, services, and supplies exists around many recreation destinations.

POPULATION GROWTH

The year-round population in the area, particularly around Gulf and Bay Counties, continues to climb. As Tyndall Air Force Base undergoes a 7-year \$4.9 billion rebuild, workforce housing remains scarce for the estimated 3,000 contractors working on the project. When the facility is completed, the installation could grow from its current size of about 4,000 people to 8,000 for full operations. Fifteen miles east of the base, developers in Mexico Beach plans to build over 500 homes in five years. A range of housing types is needed in cities adjacent to the base. Temporary housing for contractors is needed now in Callaway, Parker, and Springfield, as well as in the future for permanent residents working at the base. Businesses including restaurants, stores, and recreation and entertainment services are needed to serve the new residents.

PUBLIC/PRIVATE FUNDING MODELS

Public funding has supported a range of planning projects within Panhandle communities to prioritize projects and position them for implementation. In addition, new funding sources and partnership models are creating innovative ways for investors to build profit with financial and institutional support to provide goods and services for the market. Cities, counties, and regional planning offices actively seek partnerships and pursue grants for public-private ventures, such as the renovation of the historic St. Luke's Church for event space in Marianna, Florida (see page 27).

EXISTING DEMAND

Across the region, many opportunities exist for the following services to support the growing recreation economy and year-round population:

LODGING

- Hotels
- Campgrounds
- Bed and breakfasts
- Short-term rentals

HOUSING

- Single family housing
- Multi-family housing

GOODS AND SERVICES

- Full-service grocery stores
- Local and seasonal goods
- Urgent care clinic
- Pharmacy

RESTAURANTS

- Family-friendly dining
- Fast food and take out
- Novelty (i.e., ice cream, coffee)

RECREATION

- Recreation equipment
- Recreation outfitters
- Outdoor guide services
- Fishing
- Paddling (rivers, lakes, bays)
- Ecotourism

EVENTS

- Outdoor festivals
- Bike, paddle, running events



REGIONAL INVESTMENT

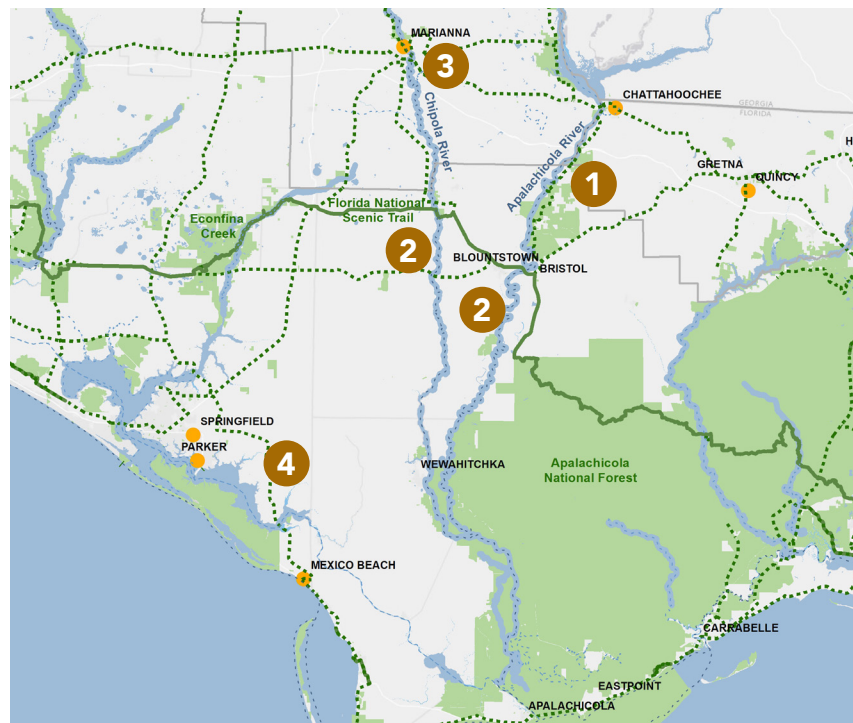
Many Panhandle communities, located on the frontline of climate and environmental challenges, are prioritized for federal funding and investment incentive programs designed to improve the long-term economy and sustainability of the region.

BIPARTISAN INFRASTRUCTURE LAW

The Bipartisan Infrastructure Law (Infrastructure Investment and Jobs Act), has designated millions of dollars toward new federal and state grants to fund a range of infrastructure projects over five years, enabling the region to restore unique landscapes and natural features, which boast some of the greatest biodiversity in the U.S. The funding aims to integrate regional and local recreation infrastructure projects such as new walking and biking trails to connect destinations and restoration efforts at rivers, lakes and bays to improve water quality and water-based recreation. The projects will increase access for outdoor enthusiasts seeking the extraordinary variety and experiences that the Panhandle offers.

Local, state and regional partners have identified priority projects for funding based on potential to boost the recreation economy, enhance and preserve high value ecological and cultural landscapes, and improve community quality of life. Some of the grant opportunities include:

- 1 Trails connecting Chattahoochee, Bristol and the Apalachicola National Forest
- 2 River-to-sea highwater camping and paddling trails along the Chipola and Apalachicola Rivers
- 3 Black Heritage Trail recognizing the rich cultural heritage of North Star Legacy Communities
- 4 Great Northwest Trail, connecting inland communities to St. Andrews Bay



JUSTICE40 INITIATIVE

The Panhandle region includes many frontline communities prioritized for federal funds across multiple agencies through the Justice40 initiative, an effort to direct at least 40% of federal investments in climate and clean energy, including sustainable transportation, to vulnerable communities. Note the Justice40 areas that overlap with important recreation systems along the Apalachicola River and in waterfront communities such as Mexico Beach and Port St. Joe.

OPPORTUNITY ZONES

The Opportunity Zones (OZs) program is a federal tax incentive tool designed to lower barriers to development by providing tax benefits for new investments in economically stressed areas. New long-term investments in OZs are eligible for tax incentives, including deferral and/or reduction of capital gains taxes for long-term investments.



Map of Justice40 Disadvantaged Communities based on beta version of Climate and Economic Justice Screening Tool (CEJST), overlaid with regional OZs.

SENTINEL LANDSCAPE DESIGNATION

A Sentinel Landscape is an area designated by the U.S. Departments of Defense, Agriculture, and Interior. Sentinel Landscapes provide focus areas where these agencies work together with other public agencies and private partners to maintain compatible land uses that conserve listed species habitat and minimize encroachment threats and constraints to military missions. Sentinel Landscapes protect:

- The mission of military installations
- The habitat of threatened and endangered species
- Working lands

The Northwest Florida Sentinel Landscape, established in February 2022, encompasses nine Department of Defense installations and ranges integral to the Air Force, Navy, Marine Corps and Coast Guard including Eglin Air Force Base (AFB), Tyndall AFB, Naval Air Station (NAS) Pensacola, NAS Whiting Field, Naval Support Activity Panama City, Eglin Gulf Test and Training Range, Hurlburt Field, Saufley Field, and Corry Station. In addition to high priority military operations areas and restricted airspace, the Northwest Florida Sentinel Landscape also contains the Apalachicola National Forest, Blackwater River and Tate's Hell State Forest, St. Marks and St. Vincent National Wildlife Refuges, St. Joseph Peninsula and Torreya State Parks, and the congressionally designated Florida National Scenic Trail, which provide public recreation opportunities and habitat for threatened and endangered species such as the red cockaded woodpecker, gopher tortoise, and frosted flatwoods salamander.

The Northwest Florida Sentinel Landscape aims to enable collaborative efforts and provide greater access to funding assistance from federal, state, and local governments and private sector programs. To increase the landscape's resiliency, mitigate coastal risks, and better adapt to the changing climate, the Northwest Florida Sentinel Landscape partners are working towards conserving and restoring habitat and water resources with an emphasis on listed species recovery, prescribed fire, and water quality and quantity. The landscape partners will focus on supporting longleaf pine restoration, native grassland restoration,

hydrological restoration, listed species recovery, at risk species conservation, invasive species control, prescribed burning, and stormwater capture and water re-use infrastructure projects to enhance the resilience of the landscape as a whole, as well as to enhance recreational opportunities for service personnel and their families across the region.

For more information, see: <https://sentinellandscapes.org/landscapes/northwest-florida/>



Top: A great blue heron and tricolored heron wade in the marsh at the St. Marks National Wildlife Refuge by Running Wild Media (provided by Defenders of Wildlife).

Middle: F-35C Lightning II jet flies over Eglin Air Force Base by Navy Chief Petty Officer Shannon E. Renfro (provided by the U.S. Department of Defense).

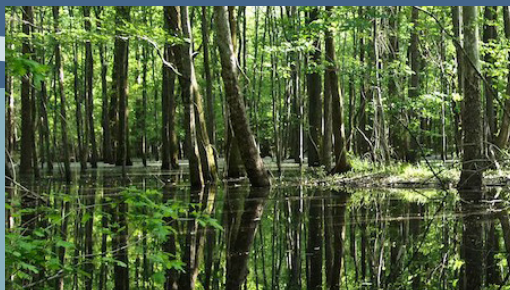
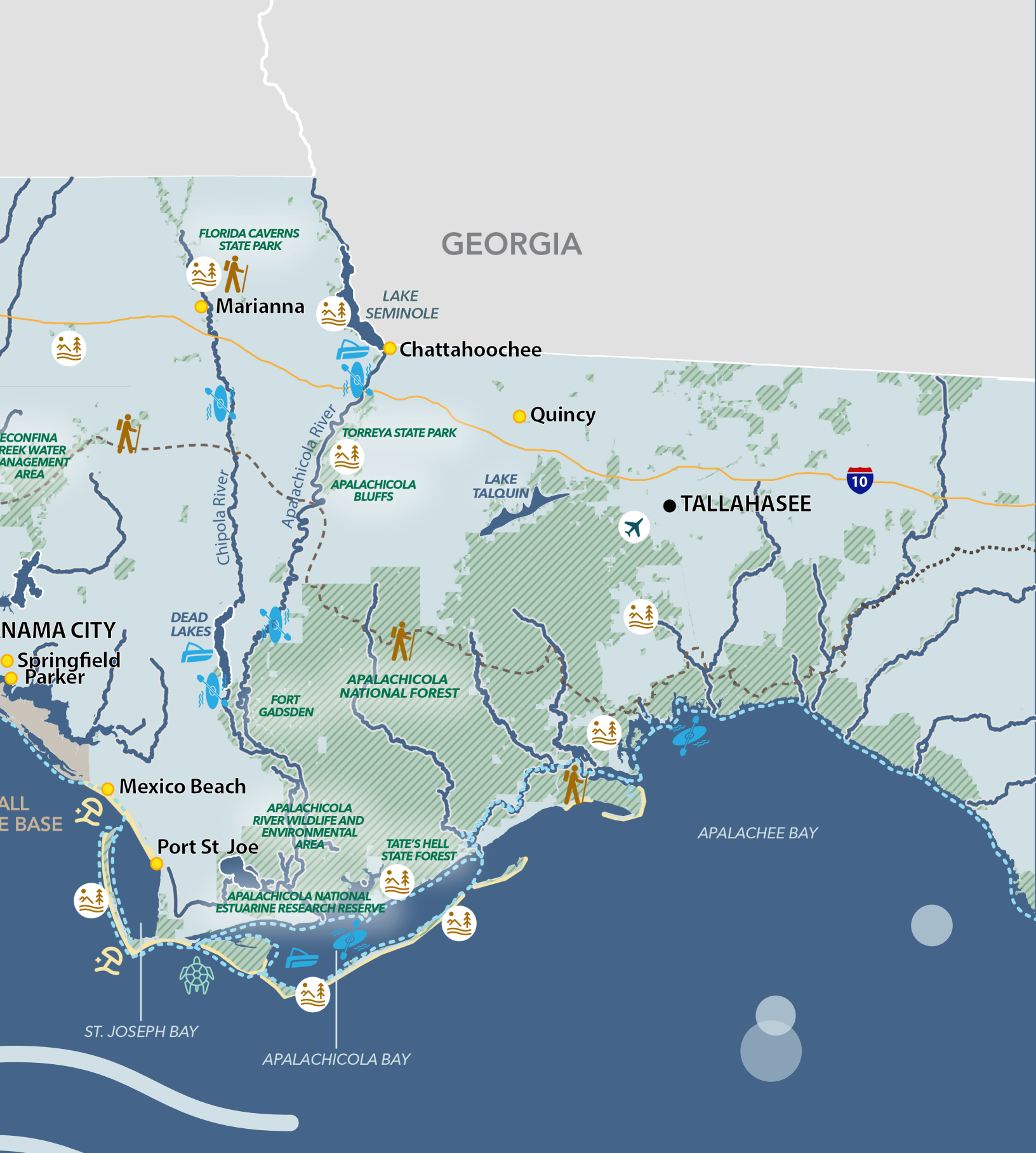
Bottom: Tyler Macmillan and Joe Guthrie in a restored longleaf pine forest in Econfina Creek Water Management Area by Carlton Ward, Jr.



REGIONAL RECREATION

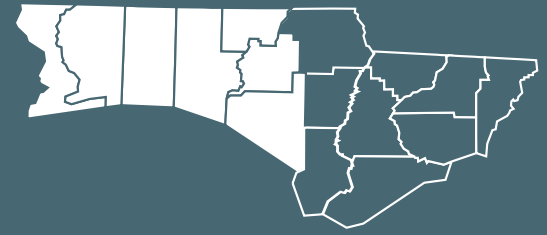
ALABAMA





REGIONAL PROFILE

EMERALD COAST REGIONAL COUNCIL

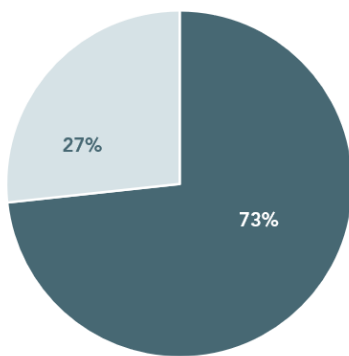


Population

Emerald Coast: 1,017,065

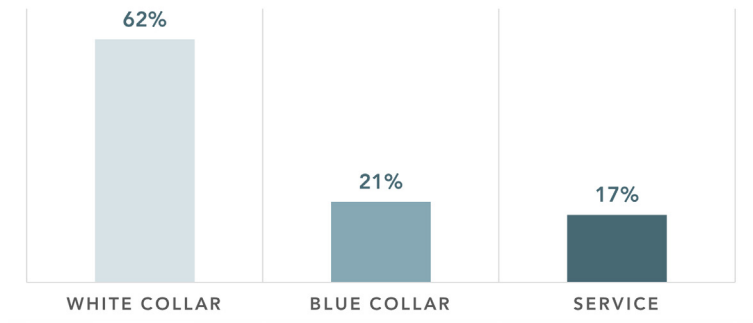
Florida: 21,596,068

Education



- High School
- Bachelor's Degree or Higher

Workforce



Total jobs 89,571

Unemployment: 4.1%

Housing and Income

\$231,019
median home
value



\$47,085
per capita
income

Opportunity Zones

| COUNTY | OZS | BELOW POVERTY LINE | HIGH SCHOOL DIPLOMA | MEDIAN INCOME | MEDIAN HOME VALUE | MEDIAN AGE |
|------------|-----|--------------------------|---------------------------|------------------|-------------------------|---------------|
| BAY | 3 | 32% | 83% | \$28K | \$70K | 33 |
| ESCAMBIA | 7 | 32% | 79% | \$31K | \$74K | 38 |
| HOLMES | 1 | 20% | 80% | \$44K | \$94K | 46 |
| OKALOOSA | 1 | 17% | 90% | \$51K | \$214K | 39 |
| SANTA ROSA | 1 | 21% | 89% | \$39K | \$95K | 35 |
| WALTON | 1 | 22% | 81% | \$37K | \$110K | 40 |
| WASHINGTON | 1 | 30% | 84% | \$37K | \$92K | 34 |

Top Employers

| COMPANY | NUMBER OF EMPLOYEES |
|---------------------------------|---------------------|
| TYNDALL AIR FORCE BASE | 6,416 |
| NAVAL SUPPORT ACTIVITY (NSA PC) | 4,931 |
| BAY DISTRICT SCHOOLS | 3,943 |
| BAY MEDICAL SACRED HEART | 1,864 |
| TRANE | 807 |

Regional Assets



5 major educational institutions – State Universities and Colleges

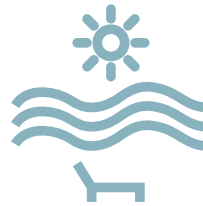


6 military installations



3 performing arts centers

- Panama City Center for the Arts – Bay County
- The Martin Theatre – Bay County
- Kaleidoscope Theatre – Bay County



133 miles of Gulf coastline in the region

- Mexico Beach – Bay County
- Panama City Beach – Bay County
- Shell Island – Bay County



15 state parks within the region
29 local parks – Bay County

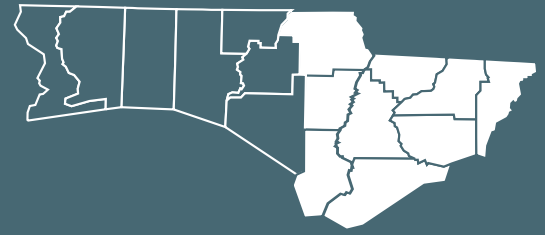


Marina Civic Center – Bay County



REGIONAL PROFILE

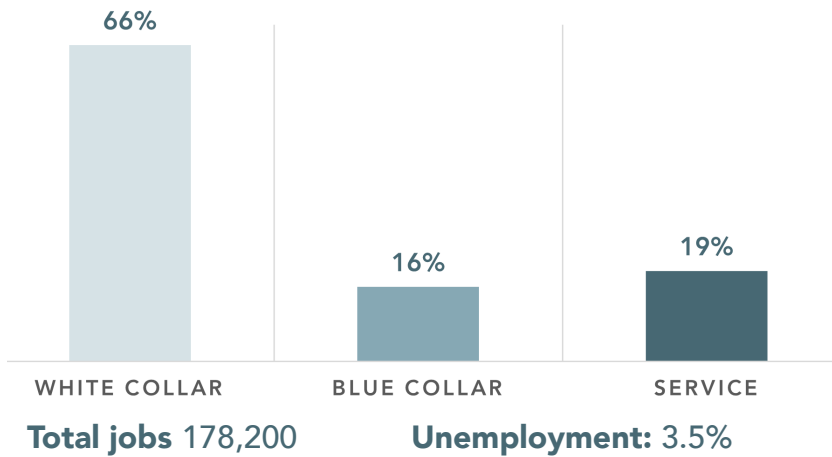
APALACHEE REGIONAL PLANNING COUNCIL



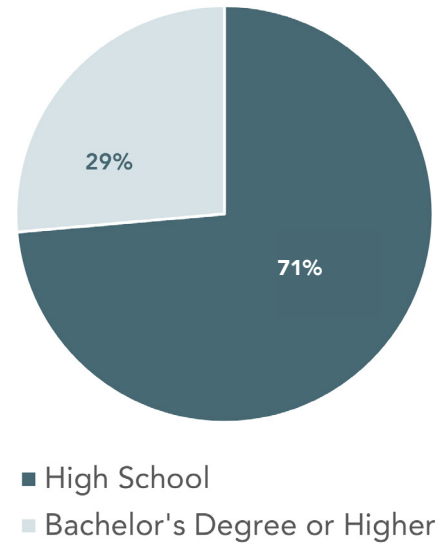
Population

Apalachee Region: 489,213 | Florida: 21,596,068

Workforce



Education



Opportunity Zones

| COUNTY | OZS | BELOW POVERTY LINE | HIGH SCHOOL DIPLOMA | MEDIAN INCOME | MEDIAN HOME VALUE | MEDIAN AGE |
|-----------|-----|--------------------|---------------------|---------------|-------------------|------------|
| CALHOUN | 1 | 15% | 78% | \$23K | \$175K | 42 |
| FRANKLIN | 1 | 19% | 81% | \$25K | \$194K | 47 |
| GADSDEN | 1 | 22% | 81% | \$41K | \$98K | 41 |
| GULF | 1 | 15% | 85% | \$51K | \$171K | 46 |
| JACKSON | 2 | 20% | 82% | \$41K | \$101K | 42 |
| JEFFERSON | 1 | 17% | 83% | \$49K | \$137K | 47 |
| LEON | 8 | 18% | 93% | \$55K | \$213K | 31 |
| LIBERTY | 1 | 21% | 80% | \$39K | \$84K | 41 |
| WAKULLA | 1 | 10% | 88% | \$67K | \$171K | 42 |

Top Employers

| COMPANY | NUMBER OF EMPLOYEES |
|---------------------------------|---------------------|
| FLORIDA STATE UNIVERSITY | 7,491 |
| LEON COUNTY SCHOOLS | 5,147 |
| TALLAHASSEE MEMORIAL HEALTHCARE | 4,483 |
| CITY OF TALLAHASSEE | 3,508 |
| FLORIDA A&M UNIVERSITY | 2,778 |
| PUBLIX SUPERMARKETS | 1,904 |
| FLORIDA STATE HOSPITAL | 1,728 |

Regional Assets



5 major educational institutions – State Universities and Colleges



8 state parks

2 national wildlife refuges



4 museums and historic sites

- John Gorrie State Museum
- Constitution Convention State Museum
- Natural Bridge Battlefield Historical Site
- San Marcos de Apalachee State Historic Site

Unique attractions:

- Florida Caverns
- Lake Jackson Mounds Archaeological Site
- Apalachicola National Estuarine Research Reserve

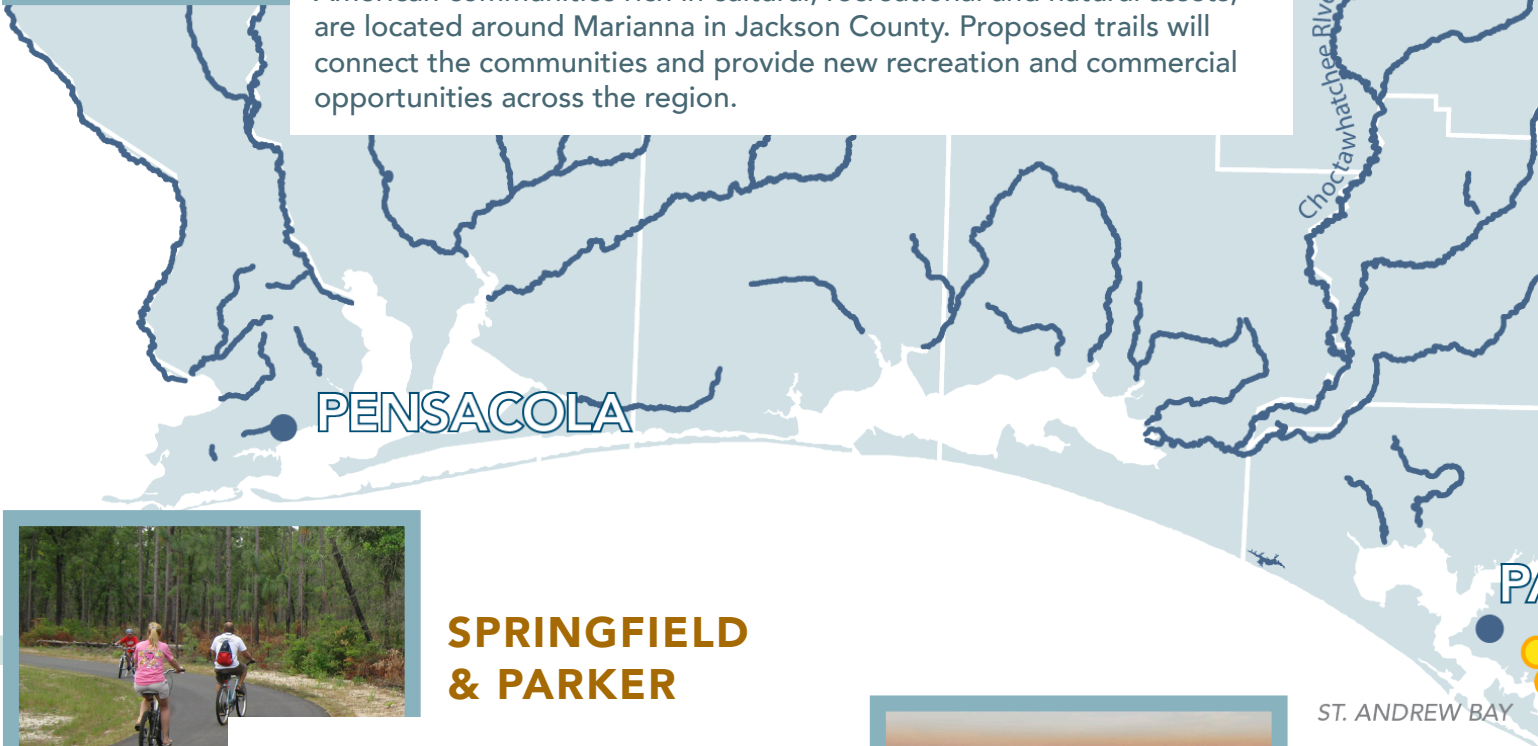




MARIANNA AND NORTH STAR LEGACY COMMUNITIES

The seat of Jackson County, Marianna is located on the pristine Chipola River, a designated paddling trail. Numerous recreation areas along the river and local lakes offer picnicking, canoeing, hiking, and camping. Marianna is home to Florida Caverns State Park and Chipola College.

Many of the historic North Star Legacy Communities, historic African-American communities rich in cultural, recreational and natural assets, are located around Marianna in Jackson County. Proposed trails will connect the communities and provide new recreation and commercial opportunities across the region.



SPRINGFIELD & PARKER

Adjacent to St. Andrew Bay and Martin Lake, both cities boast extensive waterfront. Business Highway 98, the primary connector between Panama City and Tyndall Air Force Base, runs through Springfield and Parker. Commercial properties along the route are well-positioned for mixed use redevelopment to serve daily commuters and tourist traffic, and to meet demand for housing and services driven by the expansion of Tyndall Air Force Base. This prime location is supported by several significant infrastructure investments including new highways, bridges, bike lanes, sidewalks, and civic centers that will improve the quality of life for the community.

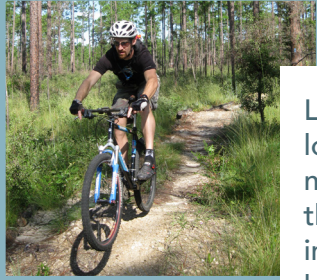


ST. ANDREW BAY

MEXICO BEACH

This small coastal fishing and tourist destination offers over a mile of unobstructed beachfront views of the white-sand beach and emerald Gulf waters. A new public pier under construction will support new downtown small-scale development, where local events and family-owned businesses attract heavy tourist traffic.

OPPORTUNITY COMMUNITIES



CHATTAHOOCHEE

Located on the Apalachicola River, Chattahoochee offers boat access, parks, lodging, and miles of trails for year-round recreation enthusiasts. A new mountain bike park is planned for an expansive forested, hilly property along the river. The highly anticipated Chattahoochee to Bristol regional trail will increase daily and short-term visitors. The town's charming downtown is located within walking distance of river recreation amenities, lodging and the planned mountain bike park.



QUINCY

Located 20 minutes west of Tallahassee, Quincy's historic courthouse, Victorian homes and quaint downtown district attract visitors. Quincy also is home to the modern Gadsden Arts Center, which exhibits the work of local artists and is a favorite spot on the North Florida Arts Trail.

GULF COUNTY

Gulf County extends from the Dead Lakes to the Gulf, encompassing numerous recreation areas including lakes, rivers, bays and extensive Gulf waterfront around the St. Joseph Peninsula.

CHATTAHOOCHEE

RIVERFRONT RECREATION AND COMMERCIAL OPPORTUNITY



ASSETS

Located on the beautiful Apalachicola River, Chattahoochee offers many investment opportunities to meet the market demand of recreation enthusiasts and visitors. A variety of recreation options, including hiking, biking, paddling, and camping within walking distance to downtown, attract year-round visitors.

River Landing Park, a short walk from Chattahoochee's active downtown, features boat access, Native American archaeological mounds, picnic pavilions, restrooms, playgrounds, and hiking trails. The park's trail system connects to miles of walking trails east in Angus Gholson Nature Park.

River Landing Park includes a popular RV park and campground site with new infrastructure and amenities. The park is typically fully occupied, and visitors walk or ride golf carts to local shops and restaurants that line Chattahoochee's Main Street.

Plans for a 150-acre mountain bike park along the river and two new trail spurs connecting to the Old Spanish Trail/90 Corridor and the Chattahoochee-to-Bristol Trail are underway.



Recent public investments in Chattahoochee's parks and downtown district have boosted commercial occupancy, tourism, and the housing market, which has doubled in the last three years. The city is actively seeking partners to invest in new businesses that can support the growing numbers of visitors and residents.

GOAL

Redevelop vacant properties downtown to create active commercial businesses that serve recreation enthusiasts and tourists seeking lodging, restaurants, outdoor recreation supplies, and local goods.

NEEDS



Outdoor Recreation Outfitter

General supplies and paddling equipment and rentals, including portage service.



Lodging

Bed and breakfast, short term rentals, and traditional lodging options are all in demand.



Food

Locally owned restaurants or markets offering dine in, take out or prepared foods for visitors.



Event space

Gathering space needed for conferences, meetings, workshops, classes, and events.



Bike shop

Development of the mountain bike park will create strong demand for bike shop.



Local markets

Meet demand for selling and buying local produce, crafts, and other goods.

CONTACT:

Robert Presnell, City Manager

850-663-4475 | rpresnell@chattahoocheefl.gov

REDEVELOPMENT READY

1 Victory Bridge (River Landing Road)

The historic 100-year-old bridge, accessible from River Landing Park and walking distance to Downtown, overlooks the Apalachicola River. Efforts are underway to assess and reinforce the stability of the structure to reopen it for the community. Potential uses in addition to a historic community asset include partitioning the space or creating flexible use areas for event space, gathering plaza, gardens, and outdoor dining.

2 516 W. Washington Street

This corner site on Chattahoochee's Main Street is a perfect location for a bed and breakfast or other lodging. Close to River Landing Park and downtown restaurants.

3 314 W. Washington Street

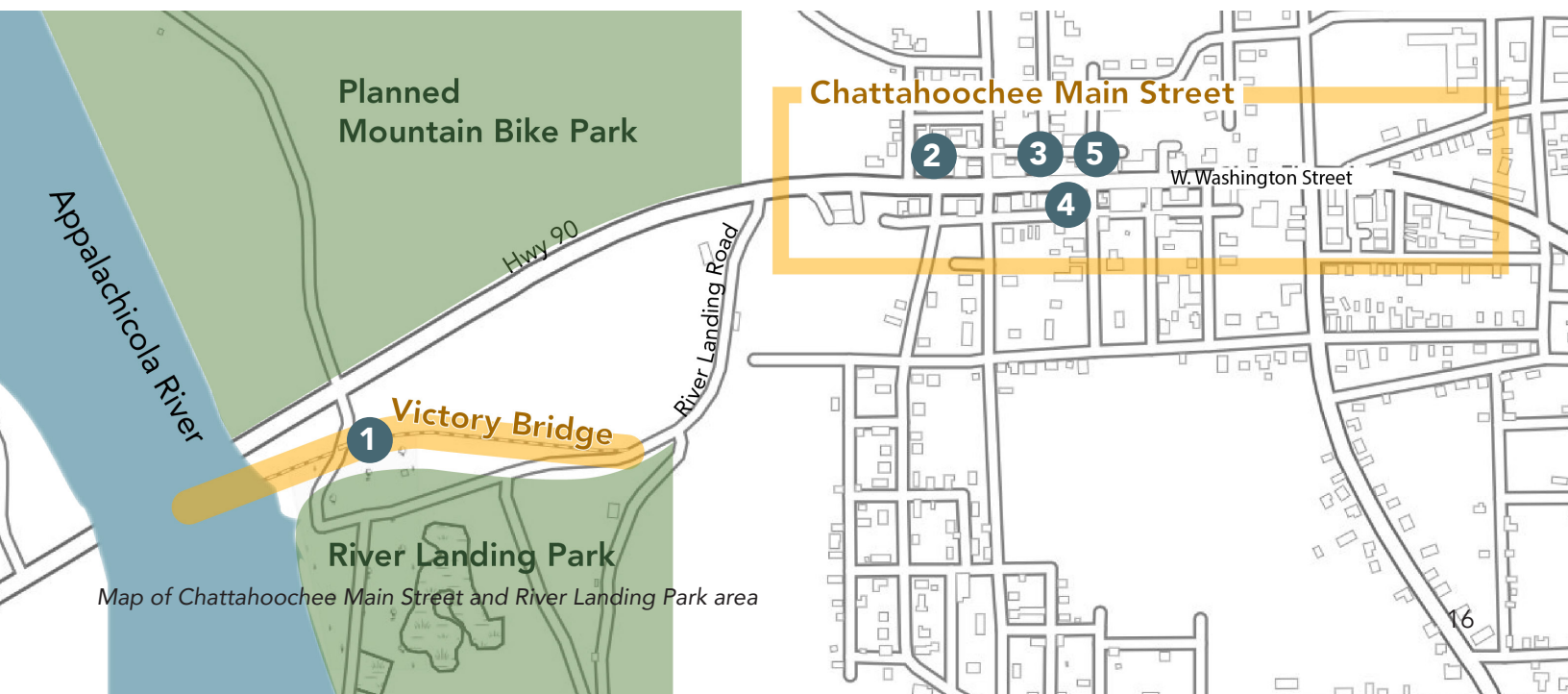
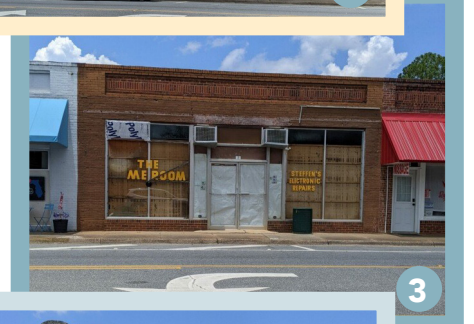
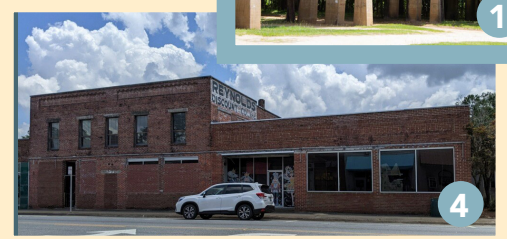
Business space for rent in the heart of downtown. Suggested use: Maker space or flexible cooperative use for multiple small businesses or pop-up shops. Street-facing building can accommodate approximately two to four businesses.

4 Reynolds Building (313 W. Washington Street)

Brick structure facing Chattahoochee's Main Street with 12,000 to 15,000 square feet available for lease; some second-floor area. Suggested uses: Indoor and outdoor dining (upstairs); indoor market to include partitioned spaces for goods such as food, coffee, produce, and crafts.

5 Historic Theater (300 W. Washington Street)

Former theater in the middle of Main Street business district. Suggested use: Four to five separated office spaces.



Map of Chattahoochee Main Street and River Landing Park area

SPRINGFIELD

COMMERCIAL REDEVELOPMENT

BUSINESS OPPORTUNITIES TO SERVE A GROWING POPULATION



Springfield's Third Street/Route 22 corridor is ready for commercial growth to serve the growing population at nearby Tyndall Air Force Base and Panama City Beach. The city plans to transition use and ownership of several properties in the area and strongly supports redevelopment. The city is a ready partner for redevelopment projects that enhance the quality of life and community resilience.

ASSETS

- Road and sidewalk improvements along Third Street and Transmitter Road support commercial redevelopment that is neighborhood-friendly for residents and accessible for commuters traveling between Tyndall and Panama City.
- Road planning for the new Gulf Coast Parkway, Gulf Coast Turnpike and potential new improvements to the Great Northwest Trail are also being developed.
- Planned enhancements to nearby Martin Lake, including a waterfront park with boat access and water quality improvements, and a proposed 11-mile greenway loop trail that links Third Street to Callaway, will increase recreation activity.
- The location is within miles of two major growth centers, Tyndall Air Force Base and Panama City Beach, and there are new cruise ship plans for Port Panama City that position Springfield for further growth.
- The corridor is a short walking distance to popular parks and recreation areas.

CONTACT:

Mayor Ralph Hammond, City of Springfield
850-872-7570
rhammond@springfield.fl.gov

GOAL

Redevelop several vacant and underutilized properties with a mix of small-scale commercial uses including restaurant, retail, and recreation-focused services such as boat rentals and fishing supplies.



Martin Lake view from 4004 Wewa Highway/Route 22 (see redevelopment ready opportunity three on the following page)



Proposed streetscape improvements on Third Street

REDEVELOPMENT READY

1 3219 East Highway 98 (Corner of East Third Street)

Five to six adjoining commercial spaces suitable for small-scale businesses or services are available in this community shopping center along Highway 98. The properties are owned by Goodwill Industries.

2 3726 East Third Street

This street-facing lot is suitable for restaurant, small to medium commercial, or a strip mall. The property is owned by City of Springfield, and the city is eager to partner for redevelopment.

3 4004 Wewa Highway/Route 22 (Third Street extended)

This vacant property adjacent to Martin Lake has lake access and is clear for development. The property is suitable for small size commercial use, preferably a recreation outfitter with supplies and rental equipment for lake recreation. The property is privately owned.

NEEDS & OPPORTUNITIES



Outdoor Recreation Outfitter

General supplies and paddling equipment (rentals) to support paddling activity on St. Andrew Bay and Martin Lake.



Housing

Multifamily units are in high demand to meet the growing population at Tyndall Air Force Base.

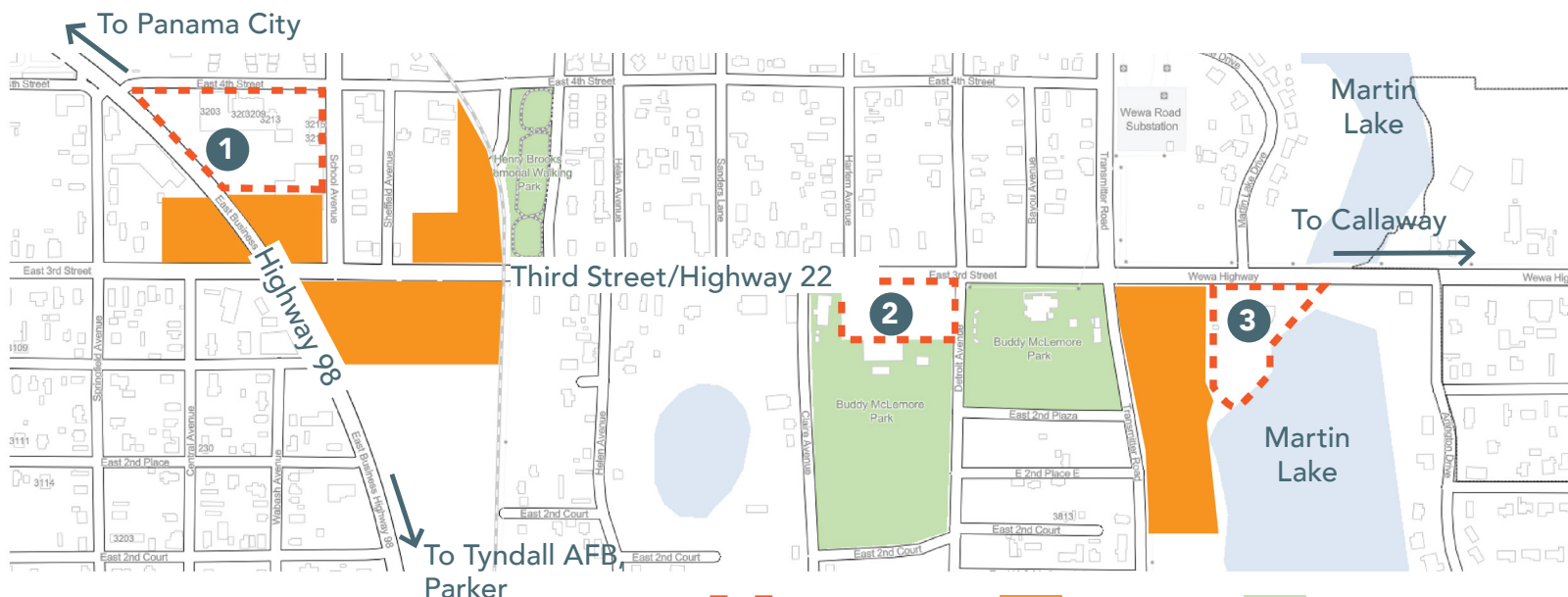


Food

Locally owned restaurants or markets offering dine in, take out or prepared food.



Examples of potential redevelopment



Redevelopment opportunity



Active civic or commercial



Recreation

Map of Third Street Corridor in Springfield

MEXICO BEACH

COMMERCIAL DEVELOPMENT

A GROWING COMMERCIAL AND RECREATION DESTINATION FOR VISITORS AND LOCALS



Significant progress toward long-term economic growth, resilience, and quality of life in this charming beachfront community is illustrated by sizeable investments in beach restoration, water quality, infrastructure, and residential development planning during the last three years. Vibrant, local businesses are needed to provide a variety of goods and services for year-round residents and seasonal visitors.

ASSETS

Over 500 new homes, villas and apartments are planned for construction within five years to house the year-round residents and the growing workforce at neighboring Tyndall Air Force Base.

The city is seeking developers of commercial establishments to provide necessary goods and services for the influx of residents. Currently, the closest supermarkets, pharmacies, restaurants, and medical services are approximately 25 miles away.

Additionally, Mexico Beach's new state-of-the-art public pier, planned for construction in 2023, is positioned to become a key visitor destination.

The city may engage business partners to provide fishing and beach supplies, food and more to operate on city-owned property by the pier.



CONTACT:

City Administrator Doug Baber
850-247-7875
d.baber@mexicobeachgov.com



Rendering of new pier design

NEEDS



Commercial businesses

Small- and medium-size businesses to provide groceries, and general supplies.



Food services

Local retail and family-friendly establishments to provide amenities such as donuts, ice cream, souvenirs, and sundries.



Medical care

Urgent care clinic offering services for residents and visitors.



Fishing and recreation supplies

Fishing and beach supplies and food service catering to pier visitors.

OPPORTUNITIES

The city is ready to support and/or partner for several areas:

- Development of vacant properties for commercial use along Business 98 (business district along main road).
- Development of city-owned beachfront property beside pier for food service, fishing and beach supplies, and visitor amenities.
- Development of vacant parcels along 37th Street for residential or possibly mixed use.



Rendering of 37th Street with view toward new pier



GULF COUNTY

ABUNDANT LAND AND WATER ASSETS

NEW RECREATION AMENITIES TO ENHANCE
VISITOR EXPERIENCES

PANAMA CITY

GULF
COUNTY

PORT ST. JOE

BEACHES, BAY, LAKES, PARKS, TRAILS

Gulf County attracts a variety of outdoor enthusiasts between its two major nature-based recreation destinations, St. Josephs Bay on the south side and the Dead Lakes on its north side.

Port St. Joe, a small beach town flanked by pristine white sand beaches, fronts St. Joseph Bay, one of the richest ecosystems along the Florida coast. Extending south from the town is Cape San Blas, located on St. Joseph Peninsula, a narrow stretch of land extending out from Port St. Joe and curving around the bay. A large state park accessible by boat is situated at the north tip of the peninsula.

The St. Joseph Bay Aquatic Preserve offers residents and visitors excellent opportunities to experience wildlife, including sea turtles. The area around Port St. Joe reaches full occupancy most of the year. Popular activities include fishing, kayaking, scalloping, paddle boarding, biking, wildlife watching, and hiking. Trails extend through the area around Port St. Joe and along the peninsula.

Fed by the Chipola River, Dead Lakes is a popular area for fishing, camping, boating, and hiking. The Dead Lakes area also includes a large state park and recreation amenities that include trails, boat access, and camping sites. Like the Port St. Joe area, Dead Lakes and nearby Wewahitchka have experienced notable growth in year-round visitors, increasing demand for more recreation services, amenities, and facilities.



NEEDS

Gulf County has identified demand for the following types of activities and services around Port St. Joe and the Bay Area:



PIER



OUTDOOR
RECREATION
OUTFITTER



COMMUNITY
SPLASHPAD



ADVENTURE
CONSERVATION
CENTER

OPPORTUNITIES

1. PIER

Gulf County would like a fishing and observation pier to provide access to the gulf waterfront along the peninsula for visitors to enjoy. The county proposes co-locating a pier with new breakwater structures which are planned for construction along the peninsula. The county has secured funding for a breakwater to bolster the narrowest strip of the peninsula to protect the infrastructure and the bay's rich ecosystem. The county envisions integrating a pier with the proposed breakwater structures for fishing and sightseeing on the Gulf.

The location for the breakwater structures is adjacent to unused federal land (maintained by Gulf County for Elgin Air Force Base) that offers ample space for parking and services for pier visitors, as well as access to the canoe and kayak launch for St. Joseph Bay Aquatic Preserve and to Cape San Blas Lighthouse (see map below).

Gulf County is eager to work with potential investors on a public-private partnership for building a pier to enhance economic and ecological resilience through this highly sought-after recreation amenity.



Map of south St. Joseph Peninsula

GULF COUNTY

OPPORTUNITIES (CONTINUED)

2. OUTDOOR RECREATION OUTFITTER

A recreation outfitter is needed to provide goods and services and referrals for services such as fishing guides for visitors to Gulf County from St. Joseph Peninsula north to the Dead Lakes area. Freshwater and saltwater fishing, boating and camping are popular across the area. The county is willing to support investors who can help meet the increased demand for recreation goods and services in the area, including:

- Outfitters to supply bait, tackle, and recreation equipment
- Ecotourism guides
- Shelling, snorkeling, and fishing tours
- Kayaking and paddling equipment and tours
- Pontoon rentals



3. COMMUNITY SPLASHPAD

Although the Port St. Joe area is surrounded by water, visitors and residents seek an alternative water recreation option, such as a splashpad or small wading pool, to supplement other outdoor activities. The community water park can be paired with commercial amenities such as food and drink services to become a destination.

Potential locations in Gulf County include Honeyville Park or Salinas Park Gulfside. Another potential location in the town of Port St. Joe is land adjacent to the Welcome Center and George Core Park. Gulf County supports private investment or a public/private partnership model to develop a small waterpark that can enhance local recreation assets and the local economy.



Examples of community splashpad parks and amenities



4. ADVENTURE CONSERVATION CENTER

The county sees an opportunity to enhance recreation options and create conservation areas by developing an adventure center in the central part of the county, which is easily accessible from both the beaches and the lakes for day trips.

The location and availability of large tracts of undeveloped land make the area ideal for a facility that can offer activities such as kayaking, ziplining, horseback riding, biking, ropes course, water sports and more to complement existing activities in the area. Lodging options such as tree houses and cabins on site can serve visitors to the park and give them easy access to the beaches and lakes, where existing lodging options are often at full occupancy.

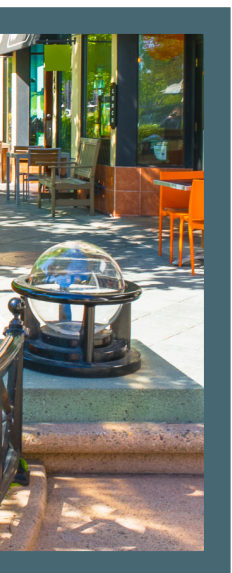
In addition, a portion of the land can be designated for conservation and include educational facilities and programming to share information about the coastal and riparian ecosystems and wildlife unique to the Panhandle region.

CONTACT: Kelli Godwin, Executive Director, Gulf County Tourist Development Council
850-229-7800 ext. 1771 | kelli@visitgulf.com



Example of zip line

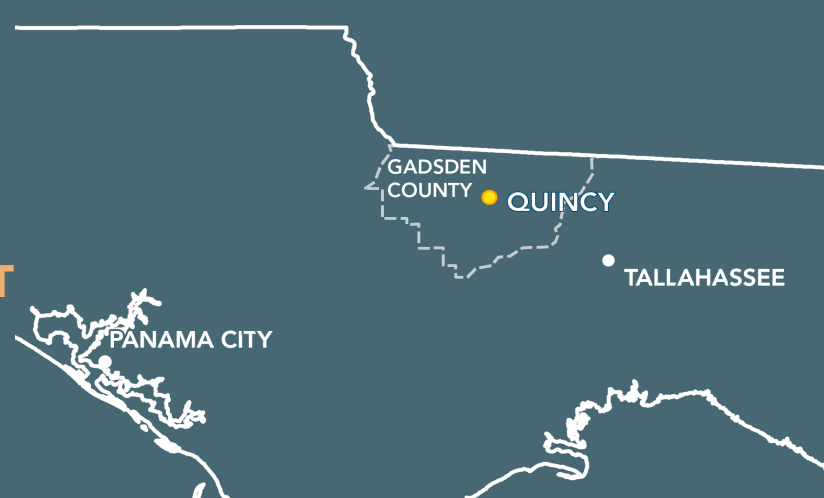
Proposed location for adventure conservation center offers easy access to Dead Lakes, Port St. Joe, Cape San Blas and other destinations.



QUINCY

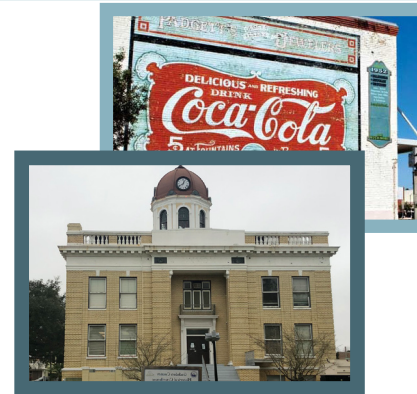
COMMERCIAL DEVELOPMENT

HISTORIC, VIBRANT DOWNTOWN AND
INNOVATIVE BUSINESS PARK



ASSETS

Quincy's downtown area, featuring historic structures, cultural arts destinations, and outdoor murals, is centered around the Courthouse Square. The Florida Black Heritage Trail, Old Spanish Trail, and other regional trails connect through Quincy. Quincy organizes events to attract visitors from Tallahassee and surrounding cities. The city has made significant investments to improve the downtown streetscapes and gathering areas. Quincy is connected to many regional destinations and is improving bike trails that link the city center with new parks and an eco-industrial facility that enhances the city's recreational and business opportunities.



INVESTMENT OPPORTUNITIES

1. Downtown

Revitalization and reuse of vacant structures downtown is a high priority for the city to activate businesses, create infill housing, and serve the needs of visitors who attend festivals and other events. Demand that aligns with redevelopment potential of downtown areas includes:

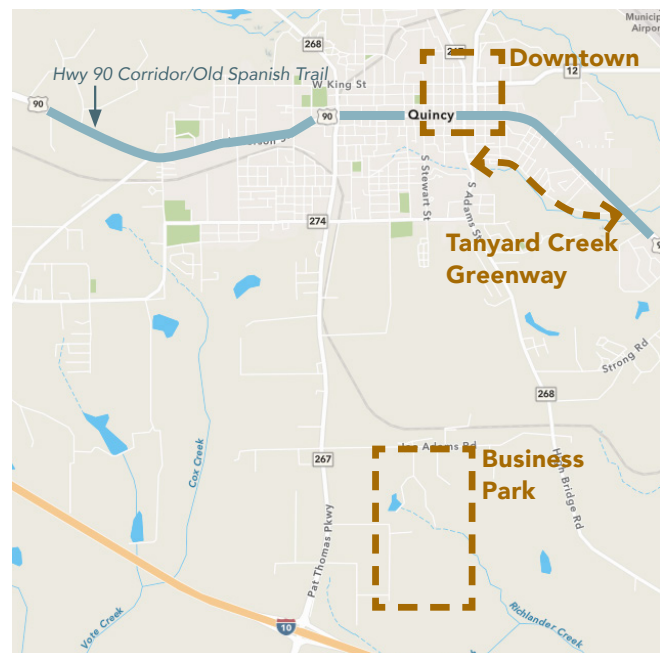
- Restaurants offering night and weekend service
- Small businesses offering local goods
- Downtown housing on second and third floors

2. Business Park

A new 300-acre business park located south of town includes a solar facility to bolster the city's electrical system. Features such as on-site wetlands and proposed regional trails nearby are attractive for companies focused on sustainable operations.

3. Tanyard Creek Greenway: Infill Housing and Recreation with Regional Connections

The Tanyard Creek Greenway will connect neighborhoods, create new outdoor experiences and expand recreation opportunities. Property along the creek has been acquired by the city to expand the greenway area to Highway 90 and to develop affordable housing adjacent to the greenway. In addition to integrating housing and recreation in the



CONTACT:

City Manager Rob Nixon
rnixon@myquincy.net

heart of the city, the 1.5-mile greenway can connect to the Highway 90 Corridor/Old Spanish Trail, and state-designated priority trail that extends from Pensacola to Jacksonville. The Tanyard Creek Greenway can serve as a catalyst for infill development of vacant properties across the city.

PARKER

INFILL HOUSING AND MIXED USE DEVELOPMENT

REDEVELOPMENT OPPORTUNITIES ON UNDERUTILIZED PROPERTY IN MAJOR GROWTH AREA

The increase in people visiting the Gulf area year-round, coupled with the growth of Tyndall Air Force Base has created growing demand for housing and services in communities around Tyndall. A variety of housing types are needed, from single family homes to affordable multi-family units. While extensive new neighborhoods are under construction on developed land in Tyndall and Mexico Beach, more developed areas north of Tyndall Air Force Base, such as Parker and Springfield, require an approach to develop infill housing and mixed-use development.

Parker, located just across St. Andrews Bay from Tyndall, is a waterfront community and important connection to Panama City and other destinations west of Tyndall. Two major routes, Tyndall Parkway and Business Highway 98 extend through the city, creating active corridors with mixed use potential. Parker offers 12 miles of coastline along St. Andrews Bay as well as waterfront property along Martin Lake.

The City is improving stormwater management to bolster Parker's resilience to storm events and improve neighborhoods that have been subject to flooding. The City is also actively working with on code enforcement and working with property owners to oversee repairs and maintenance, a long-term process since the devastation caused by Hurricane Michael in October 2018.

Parker is ready to partner with investors that are ready to enhance the community in preparation for the Air Force Base of the Future's arrival. This includes working to ensure the resiliency of the community from storms using green infrastructure to manage stormwater and ensuring that Tyndall AFB can continue its readiness mission during rain events.

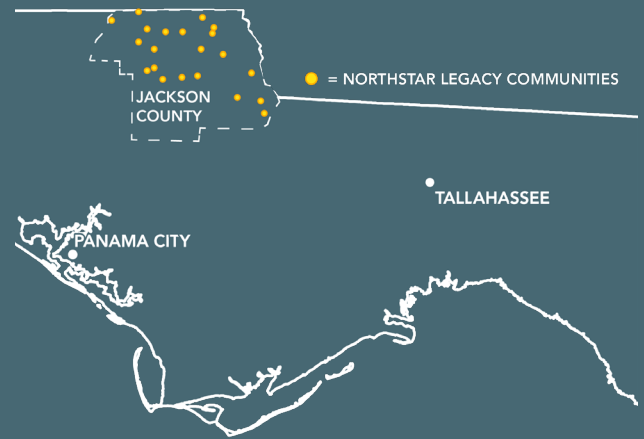
INFILL INVESTING

Many underutilized and vacant properties exist in communities around Tyndall Air Force Base in prime locations for housing and commercial development that can serve the growing population. In Parker, underutilized and vacant parcels exist across residential areas, particularly in neighborhoods north of Highway 98. Several properties along Highway 98 in Parker, which connects Panama City and Tyndall Air Force Base, are underutilized and positioned for redevelopment to meet community needs for services and housing.



NORTH STAR LEGACY COMMUNITIES

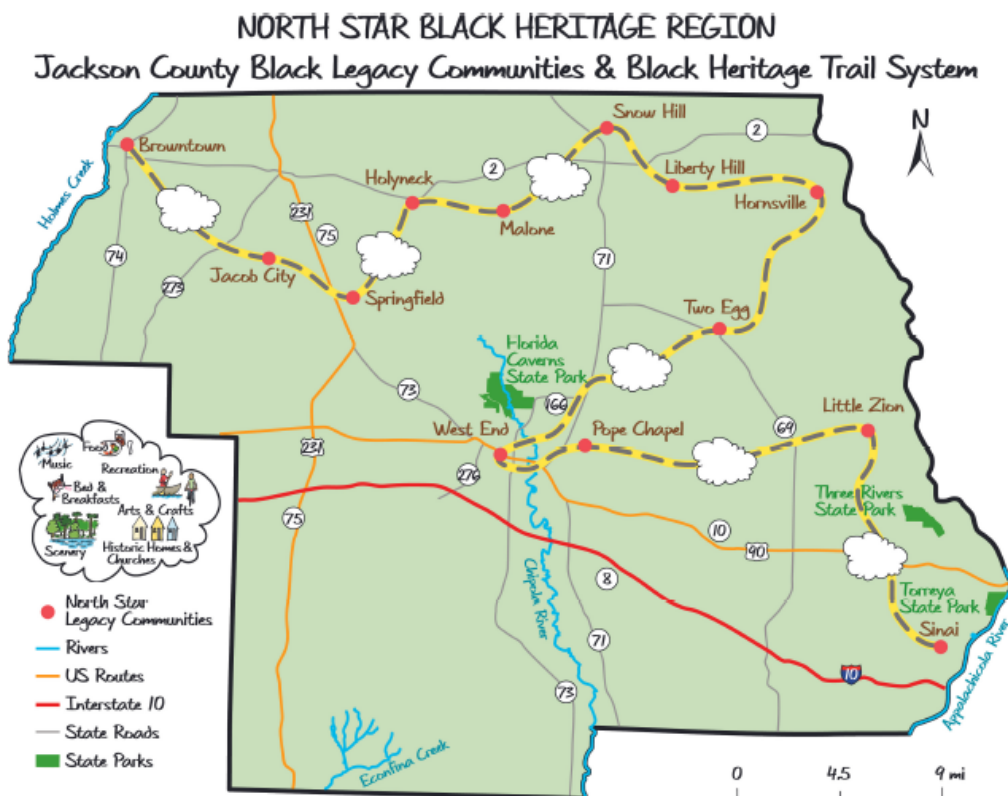
CONNECTING CULTURE, HISTORY
AND RECREATION



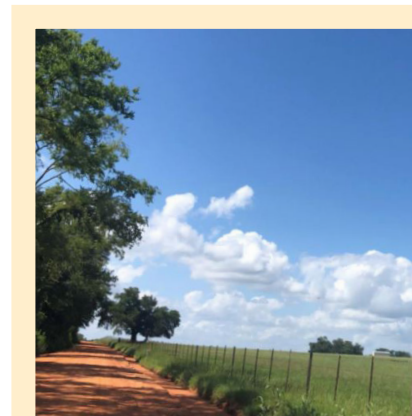
The North Star Legacy Communities project is documenting the network of vibrant African American communities that began before and thrived after Emancipation throughout this region. The culture and history of these Legacy Communities are intertwined throughout the rural landscape and towns of Northwest Florida. Historic buildings such as St. Luke Baptist Church in Marianna as well as parks, Black-owned small businesses, and festivals such as Annual Heritage Day at Renaissance Park, reveal the clusters of neighborhoods, activity, and commerce that once thrived in northwest Florida.

With over 70 communities across three counties documented, North Star Legacy Communities is working closely with local, regional and state partners to reestablish the Chitlin' Circuit and create a recreational and cultural Black Heritage Trail network that recognizes and connects North Star Legacy Communities to the existing Florida trail network. Surrounded by the rich natural assets of northwest Florida, the North Star Legacy Communities and the Black History Trail can enrich the cultural and recreation opportunities for visitors and locals along with the area's beautiful rivers, extensive trail systems, and expansive coast.

The map below shows Jackson County North Star Legacy Communities in context of surrounding existing and proposed state trails, which will intersect and overlap with the Black Heritage Trail, leading to longer visitor stays.



Making syrup at Heritage Day festival in Renaissance Park.



A country road in Jacob City.

OPPORTUNITIES

As recognition of the North Star Legacy Communities expands, stakeholders have begun to identify potential investment opportunities that build on current recreation infrastructure and cultural assets.



RECREATION EVENTS

Recreation event planners can take advantage of the regional trail system and scenic landscapes between Tallahassee and the Gulf for organized events such as triathlons, running, or bicycling races to offer unique experiences for participants. The Legacy Communities are located close to Northwest Florida's extensive trail system which links urban areas, rural areas, and natural assets such as rivers and beaches.



LODGING, FOOD, AND SERVICES

Historic buildings in Legacy Communities are positioned for reuse as entertainment venues, bed and breakfasts, community centers and more. The North Star Legacy Communities project is a catalyst for revitalizing the communities and traditions by restoring historic assets and rebuilding black-owned businesses.



CULTURAL FESTIVALS

Gatherings such as the Renaissance Park Heritage Day attract visitors and provide unique opportunities for elevating black-owned businesses in North Star Legacy Communities. The development of the North Star Legacy Trail Corridor and restoration of historic assets in the region will create new opportunities for festivals and entertainment.



REVIVAL OF THE CHITLIN' CIRCUIT

Chitlin' Circuit, the network of Black-owned nightclubs, dance halls, juke joints and theaters in the South where African-American musicians and performers flourished during the era of Jim Crow. Revival of the Chitlin' Circuit presents an opportunity for restoring historic venues and organizing music festivals that attract performers and tourists to recreate the vibrant music and performance scene across the Panhandle.

INVESTMENT READY

Graham's Place, a Florida Heritage Site, was constructed in 1925 in the heart of the West End Community of Marianna. It is the oldest surviving African American business building in the community.

Extensive improvements are needed to restore the historic building and fulfill the vision of returning it to a cultural events venue and museum.

The two story building footprint is 63' x 33' totaling 4,158 square feet. The building is an excellent example of local African American architecture and construction at the turn of the 20th century. The building is constructed with locally mined limestone, stone and shell.



Graham's Place Building

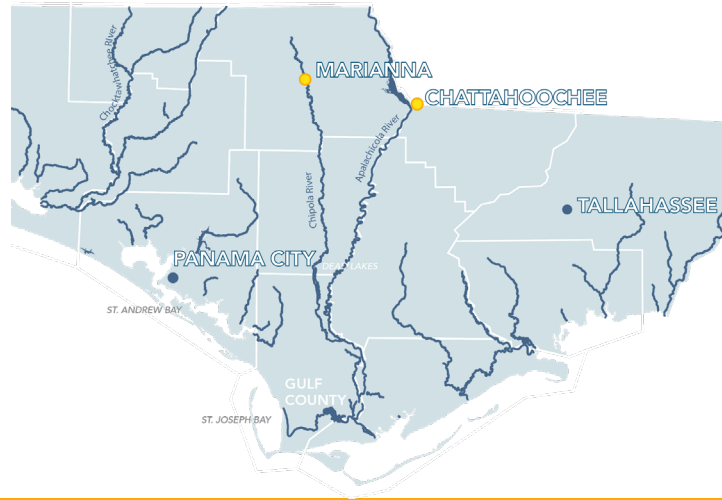


St. Luke Baptist Church, Marianna. A public-private partnership between the City and the Church created new funding opportunities to restore the historic structure, which was heavily damaged by Hurricane Michael, as a gathering and events venue for the community and the congregation.

CONTACT: Dr. Sandra Thompson, Florida A&M University
850-561-2190 | sandra.thompson@famu.edu

RIVER RECREATION SERVICES

RECREATION OUTFITTERS AND CAMPSITES ALONG REGIONAL WATERWAYS



The Apalachicola River is formed by the confluence of two rivers at the Lake Seminole reservoir near Chattahoochee. The Chipola River flows through Marianna and joins the Apalachicola in north Gulf County. The river flows into Apalachicola Bay along the Gulf of Mexico. The northern reaches of this basin include steep bluffs and deep ravines, some of the most significant natural features of the southeastern Coastal Plain. Areas of natural habitat along the river include Apalachicola National Forest, Torreya State Park, The Nature Conservancy Apalachicola Bluffs and Ravines Preserve, Tate's Hell State Forest, and the Apalachicola River Wildlife and Environmental Area.

The Apalachicola Blueway is a state paddle trail that extends 107-miles to the Apalachicola Bay, where it joins the Florida Circumnavigational Saltwater Paddling Trail. The Apalachicola River Paddling Trail System includes several side creeks in the lower Apalachicola Basin.

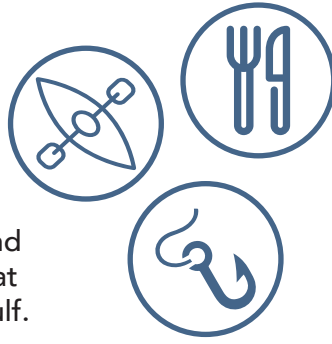
The Chipola River paddling trail is a scenic 51-mile state-designated paddling trail that flows through high bluffs, river swamps, hardwood forests and caves. Eleven access points extend from Marianna to Scott's Ferry, where the trail joins the Dead Lakes and the Apalachicola River Blueway.



OPPORTUNITIES

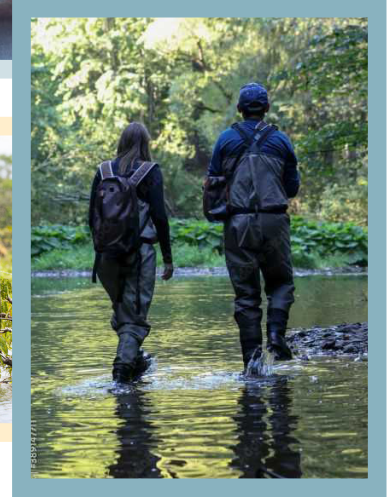
Recreation Outfitters

As beach tourism nears capacity, inland recreation is expanding to include tubing, paddling, camping and other activities which are accessible at lakes, rivers and bays close to the Gulf.



Services are needed to help visitors to access and enjoy many unique natural assets in the region, including:

- Guides for freshwater and saltwater fishing, ecotourism, horseback riding, ATV tours, biking and more
- Portage service for paddlers along the Apalachicola and Chipola Rivers
- Equipment rentals (kayaks, paddleboards, boats, bikes)
- Food and provisions near river and lake access locations



Highwater Campsites

The Apalachicola River Basin offers access to caves, lakes, rivers and woodlands from many established paddlerways. Highwater and primitive camping facilities are needed to provide safe temporary lodging for recreation enthusiasts, who are limited to day trips in many areas, particularly along rivers, due to remote access points and limited lodging options.



Along the Apalachicola and Chipola Rivers, highwater camping facilities would enable paddlers to take multi-day trips between Marianna or Chattahoochee and the Gulf. Highwater and primitive campsites can be developed and maintained through public-private partnerships.



Illustrations of highwater campsite designs proposed along Apalachicola River.

LODGING

REGION-WIDE NEED FOR RECREATION-BASED LODGING AND SERVICES

The Panhandle area needs lodging and housing to meet the growing demand of seasonal and year-round recreation enthusiasts and residents.

Short term rentals

Vacation rentals located along the Gulf are often at full occupancy year-round, and few lodging options exist near popular lake and river destinations, such as Wewahitchka, where recreation is expanding along the area's lakes and rivers. Inland cities such as Chattahoochee and Quincy also need short term lodging. As trail systems continue to develop linking these regional towns, the demand for lodging will continue to grow. The historic, charming downtown areas of these cities include vacant structures that are well-positioned for redevelopment as lodging through private investment, city support and a variety of grants.

In Mexico Beach, where vacation housing inventory was diminished by Hurricane Michael, the city is a willing partner for redevelopment of housing that meets long-term goals for resilience. New mixed-use models, such as structures that accommodate housing above commercial spaces, offer the flexibility to meet updated residential flood zone requirements while creating income opportunities at street level.

RV parks and campgrounds

Recreational vehicle (RV) camping is an ideal way to experience the varied landscapes and activities along rivers, lakes and beaches. Private developers and municipalities are investing in properties with amenities to serve RV enthusiasts in the region. Many vacant properties are well-situated for redevelopment as RV camping sites to meet the growing demand.

Chattahoochee recently renovated and expanded an RV camping facility beside the Apalachicola River, which is often fully booked.



LODGING NEEDS

Many types of lodging are in high demand across the Panhandle region:



**HOTELS,
INNS, BED +
BREAKFASTS**



**HIGHWATER
+ PRIMITIVE
CAMPING**



**RV PARKS +
CAMPGROUNDS**



**VACATION
RENTALS**



MITIGATION BANKING

PUBLIC-PRIVATE PARTNERSHIP OPPORTUNITIES TO CREATE PARKS WITH ECONOMIC AND ECOLOGICAL BENEFITS

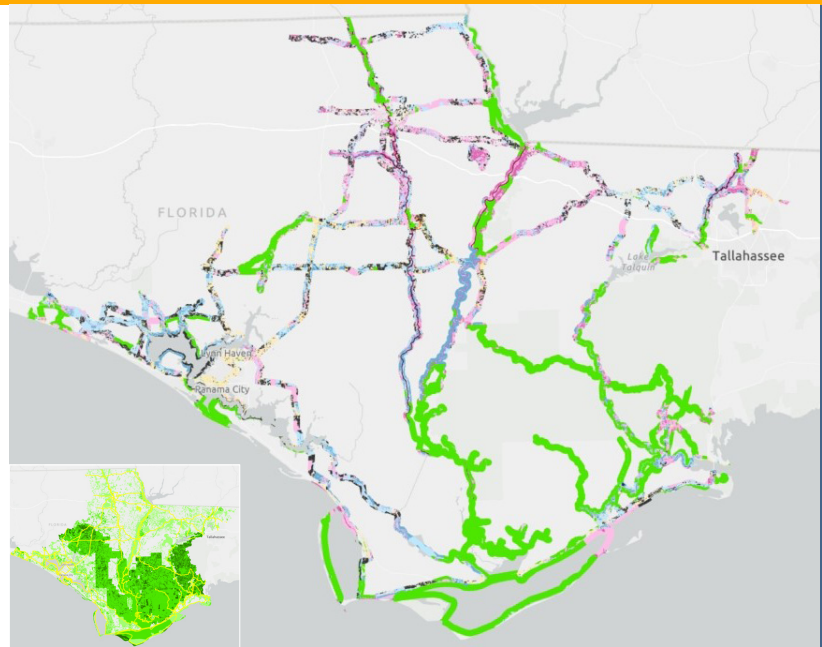
For information about the potential mitigation areas identified by RREA, contact: Rick Durbrow, U.S. Environmental Protection Agency, Region 4 at durbrow.rick@epa.gov or 404-562-8286.



RREA has identified and prioritized land for potential credit mitigation parks that can benefit outdoor recreation, ecological health, and business interests in the Panhandle. The prioritized locations connect existing recreation areas between state priority and opportunity trail corridors and numerous local, state and national parks, forests and conservation lands. Ten mitigation banks currently operate in northwest Florida, but the opportunity for enhancing stormwater management, wildlife habitat, landscape resiliency and carbon sequestration as the region continues to grow will provide more opportunities for public-private partnerships in the future.

Establishing mitigation parks within the prioritized lands can support the regional economy in several ways:

- Support and grow local businesses. New opportunities for hiking, biking, camping and other low impact recreation opportunities can attract visitors for longer periods of time, creating demand for provisions, outfitters, accommodations, guides and more.
- Promote economic stability and reduce storm damage across the region. Mitigation parks can increase the resiliency of the region's landscape, which is susceptible to storms, flooding and coastal erosion.
- Provide a resource for developers and business owners to offset development and management impacts and meet development requirements while connecting vulnerable communities to the natural resource assets that can strengthen the recreation economy infrastructure.
- Sustain preservation of forest and working agricultural lands that contribute to the financial health of landowners and communities.



Map identifying potential mitigation park lands. Lands were identified by their potential to mitigate impacts around carbon (black), resilience (yellow), conservation (pink) and stormwater (blue). The prioritized lands that address specific types of mitigation opportunities are noted in green and often identify more than one priority mitigation or crediting land cover. The small inset map identifies ecological priority land based on Florida Ecological Greenways Network, Southeast Conservation Adaptation Strategy, and community priorities. The state trail system is shown as a yellow overlay.

What is a mitigation bank?

Mitigation banking is a practice in which an environmental enhancement and preservation project is conducted by a public agency or private entity ("banker") to provide mitigation for unavoidable impacts within a defined region (mitigation service area). The bank is the site itself, and the currency sold by the banker to the impact permittee is a credit, which represents the ecological value equivalent to the complete restoration of one acre. The number of potential credits permitted for the bank and the credit debits required for impact permits are determined by the permitting agencies. (source: Florida Department of Environmental Protection)

LOOKING FORWARD

Significant planning and infrastructure investments focused on the Panhandle region's recreation economy and natural assets have been made since 2019 with the goal of strengthening the region's long-term economic and ecological resilience. Planning efforts have resulted in many actionable projects to support sustainable business development and enhance quality of life for inland and coastal communities. The Bipartisan Infrastructure Law, passed in 2021, presents new opportunities for funding to implement previously identified projects and to address other pressing needs that can significantly enhance the region's recreation economy.

The regional projects prioritized by RREA for infrastructure funding can serve as catalysts for transforming the recreation landscape by enhancing alternative transportation (such as multi-use trail systems for biking, running and walking); improving water quality of rivers, lakes and bays through stormwater infrastructure improvements; and improving the quality of life, accessibility and connectivity in the Panhandle's rural communities.

Now is the time to join the momentum behind the Panhandle's growing recreation sector. Sustainable development through public-private partnerships offer long-term economic, ecological, and community benefits.

For more information about the investment opportunities identified by RREA, contact the partners listed on pages 1 and 2. To learn more about regional efforts supported by RREA, visit <https://r2p2.skeo.com/>.

