

The Palm Beaches

TOURISM BUSINESS PLAN FY2025





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The Palm Beaches**

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London, UK
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Dear Esteemed Stakeholders,

As I embark upon my second year as President & CEO of Discover The Palm Beaches, I am filled with immense pride and gratitude for the continued success and evolution of our destination and organization. It has been a remarkable journey thus far, and I am honored to lead such a dedicated team in showcasing The Palm Beaches as a premier destination.

Over the past year, we have witnessed significant achievements and milestones that have further solidified our position in the competitive leisure and meetings & conventions global travel space. Our commitment to excellence and innovation remains unwavering as we strive to enhance the experiences of our visitors and the prosperity of our community.

Through collaboration with the Tourist Development Council of Palm Beach County (TDC) and our sister agencies under the TDC umbrella – the Cultural Council for Palm Beach County, the Palm Beach County Sports Commission, and the Palm Beach County Film & Television Commission – a comprehensive 20-year “Love The Palm Beaches Tourism Master Plan” has now been launched. This ambitious initiative aims to ensure the sustainable growth and development of our tourism sector, fostering a vibrant and thriving community for years to come.

Furthermore, we are dedicated to enhancing the stewardship of our investments in marketing activities by developing a new attribution model to assess ROI across multiple channels. This strategic approach will enable us to continue making informed and enhanced, data-driven decisions that drive growth and deliver exceptional value to our stakeholders.

In addition, we will keep expanding our use of emerging Marketing Technology. By leveraging these innovative tools, we will reshape the way consumers plan, purchase, experience, and share their vacations in The Palm Beaches. Our goal is to create seamless and memorable experiences that leave a lasting impression on our visitors.



The vitality of our local tourism economy is fundamentally driven by visitation. As we often emphasize, “It starts with a visit.” Visitors are captivated by the allure of our destination, leading them to consider it as a place to live, work, and invest. This cycle of discovery and investment fuels further business opportunities and economic growth within our community.

Looking ahead, I am excited to see the future of destination promotion. We will harness the power of transformational travel and leverage the dual impact our destination brand has on visitors and residents. By reimagining partnerships and alliances, we will further strengthen our position and enhance our holistic approach.

I extend my heartfelt thanks to each of you, our Board of Directors, and County elected officials for your support and partnership. Together, we will continue to elevate The Palm Beaches as an iconic destination. I look forward to another year of shared success and remarkable achievements.



With gratitude,

A stylized, handwritten signature in black ink, appearing to read 'M. Segarra'.

Milton Segarra, CDME – President & CEO

Accomplishments FY2024

Brand Evolution & Integrated Marketing

- Developed and launched a fully refreshed brand campaign, The Palm Beaches Collection, inviting visitors to curate their vacation experience with our mix of beaches/outdoor, fashion/shopping, sports/golf, arts & culture and culinary experiences, with announcement event in NYC in partnership with the sales team featuring 120 attendees, 37 media and 23 influencers.
- Launched year two of the “Love The Palm Beaches” campaign inviting residents to become tourism ambassadors during the summer need period, including launch activation at SunFest, robust social media outreach, broadcast TV, radio, out of home, print, PR and digital display, resulting in the following metrics:

- **SOCIAL IMPRESSIONS: 774,000**

- **TOTAL ENGAGEMENTS: 21,327**

- **PAID MEDIA IMPRESSIONS: 14.4 MILLION**

- **EARNED MEDIA IMPRESSIONS: 525,144**



- Extended the Sea to Preserve campaign by partnering with Loggerhead Marinelife Center for a beach clean-up to highlight the commitment to sustainability and community engagement for Earth Day, plus a robust marketing plan including print, out of home, broadcast, radio, and digital, generating 26 Million paid impressions, earned media impressions of 225,000 and 22 Million social media impressions.
- Supported 30 community events, including 11 social inclusion events throughout Palm Beach County in line with key brand pillars of sustainability, arts, culture, culinary and diversity.
- Created first-of-its-kind strategic partnership with Visit Florida to include a fully-integrated campaign including high-impact placements across traditional media, digital media, social media and earned media, garnering 55 Million impressions.
- Secured Presenting Partner of the Cognizant Classic in The Palm Beaches (formerly The Honda Classic) with tournament logo and name exposure across national broadcast on NBC and the Golf Channel resulting in 14 Million impressions, plus on-site fan activation area 'The Palm Beaches Cabana.'
- Leveraged proprietary data and technology to successfully grow hotel demand during need periods with highly targeted campaigns, unlocking new channels and including personalized calls-to-action and time sensitive hotel offers to grow visitation beyond forecasted levels. Sponsored a co-op opportunity with Expedia and negotiated a lower buy-in for area hotels to participate in order to drive demand to summer need periods.
- Deployed international marketing campaign targeting travelers in Toronto and Montreal in partnership with BrandUSA including high impact out-of-home with Pattison Outdoor, and campaigns with Expedia, Rogers Sports & Media, Air Canada, and Carvertise resulting in over 115 Million impressions. The Expedia.ca campaign totaled \$313,000 in gross bookings with 624 room nights for The Palm Beaches.
- Amplified partnership with Brightline to establish The Palm Beaches as a premier destination for overnight visitation through two highly visible train wraps, including one in partnership with the Cultural Council for Palm Beach County, 4 dedicated emails, 4-minutes of in-station screentime across Orlando, West Palm Beach, Boca Raton, Fort Lauderdale, Aventura and Miami stations, plus a custom Brunch Club event resulting in 379 attendees, 3 influencers resulting in 585,000 impressions and 820,000 impressions from Brightline assets.

Brand Evolution & Integrated Marketing

- Furthered our commitment to accessible travel with key partnerships including:
 - Wheel the World: Completed 30 verified destination partner assessments
 - Whereabout Travel: Developed three-year Accessible Tourism Strategic Plan, with key initiatives completed, including focus groups with key stakeholders, surveys and planning sessions
 - Travelability: Renewed our Destination Ally membership
 - Collaborated with accessibility experts to develop content highlighting accessible attractions and autism-friendly experiences in The Palm Beaches
 - Refined our approach to website accessibility by better incorporating accessible content and accessible website modification functions
- Executed photo and video shoot for Between-The-Sessions campaign targeting groups and meetings featuring 6 locations across Palm Beach County to highlight meetings and events, inviting meeting planners to 'curate picture-perfect between-the-sessions experiences in The Palm Beaches' utilizing The Collection campaign look and feel.
- Collaborated with Palm Beach International Airport to promote 18 inbound flight routes, including Los Angeles, Minneapolis-St. Paul, Detroit, Chicago, Providence, Denver and Charleston, Tallahassee, Tampa, Nassau and San Juan.
- Expanded Spring Training partnerships to include the St. Louis Cardinals and Miami Marlins, in addition to the Houston Astros and Washington Nationals. The total media value of partnerships with the four teams was \$2.2 Million thanks to in-kind advertising via game signage, English and Spanish radio broadcasts, print program advertising, social media, scoreboard logo inclusion, video plays and other assets.
- Enhanced messaging surrounding The Palm Beaches' key brand pillar of fashion and shopping with a fully-integrated campaign including a partnership with the Historical Society of Palm Beach County's Endless Summer history of fashion exhibit and key media placements in top market of New York City during New York Fashion Week.





Social Media:

- Introduced one-of-a-kind content strategy and created customized content per each social media platform to engage different audience segments more effectively and improve algorithm compatibility, reaching a record-breaking 744 Million impressions and 1.26 Million followers across 8 platforms, increasing our follower growth by 61%.
- Achieved the designation as the second most-followed destination in the nation on YouTube and awarded the Silver Content Creator plaque by YouTube with creation of 15 long-form original content videos resulting in YouTube growth to 155,000 subscribers.
- Released the “Live Like a Local” series to highlight the top 12 cities and coastal towns, focusing on the diversity of people, places, and travel experiences available, generating 66 Million impressions to date.
- Produced 44 viral videos, amassing an impressive 330 Million views.
- Hosted 153 influencers from key domestic and international markets who generated 16.1 Million additional impressions, achieving 50% diversity.
- Published 182 blogs in multiple languages including Spanish, Portuguese and German reaching 2.3 Million views, 22% increase YoY.
- Launched private Facebook group “Love The Palm Beaches” leveraging organic engagement by encouraging partners, influencers and travelers to post on the page, with 45,000 members to date.



Digital & MarTech:

- Continued evolution of the Digital & MarTech Team to develop new Marketing Technology strategies including a comprehensive roadmap, enablement strategy and engagement of Transparent Partners agency to launch the development of these core infrastructure projects.
- Developed in-house website AI chat function on our website for prospective visitors to allow faster access to desired content, and those currently in destination to assist in creating a transformational visitor experience.
- Drove record-breaking digital presence and engagement, achieving:
 - Website Users: 6.97M
 - Website Pageviews: 12.64M
 - Website Engaged Sessions: 4.64M
 - Digital Impressions: 1.24B
 - Digital Engagements: 10.6M
 - New Email Contacts: 35,400
- Created North Star vision to guide the development of MarTech platform to ensure all efforts suit the needs of the tourism community at large including partners, stakeholders, and all impacted by tourism in The Palm Beaches:
 - "Our data vision is to deeply understand our tourism community* by seamlessly automating the organization, distillation and utilization of robust, relevant and actionable data that is centrally located, in order to continuously evolve through improved data-driven strategies and engagements, creating transformational visitor experiences and sustainable growth for the tourism economy."
- Continued to build on the 2023 launch of ThePalmBeaches.com by refining our digital footprint strategy through the following tactics and results:
 - Implemented improvements to website functionality including layout, navigation, internal linking, and the addition/removal of onsite features to drive stronger user experience resulting in an 18% increase in engaged sessions and a 35% increase in session duration.
 - Developed AI-powered sitewide and blog search engines to provide the most relevant content to users based on their search queries.
 - Crafted an in-house Travel Trade Training Portal consisting of ten modules with comprehensive information, video, and quizzes with the goal of providing robust information for travel advisors and tour operators to better sell The Palm Beaches to their clients. Bringing this service in-house is estimated to save the organization \$200,000 over the next five years.





Public Relations & Communications:

- Earned 382 Million editorial impressions through more than 5,000 media articles across a broad variety of publications, including People Magazine, Southern Living, Country Living, Forbes, Condé Nast Traveler, Men's Health, Essence, EBONY and Cosmopolitan Mexico.
- Developed thought-leadership strategy for incoming CEO Milton Segarra for local media relationship-building including WPBF On The Record, Palm Beach 100, South Florida Business Journal Power Leader, Florida Weekly and more.
- Secured national broadcast television opportunities including a featured Lindsay on Location segment during Access Daily with Kit & Mario, a week-long production in destination for CBS's Entertainment Tonight in The Palm Beaches, as well as key media partnerships including the filming of Shark Tank featuring Boarderie's World Record for the longest charcuterie board.
- Hosted 60+ top tier journalists, including 7 group media FAMS, featuring a joint experience with Visit Orlando and Brightline, Swanky Sports surrounding the Ultimate Week of Sports, culinary experiences with media from Brazil, Canada, UK and surrounding Palm Beach Food & Wine Fest, hosted visits during The Pink Retreat and a Wellness & well-being FAM.
- Executed expanded international PR efforts integrated organizational-wide with first-of-its-kind programming including media brunch in Rio de Janeiro, joint Sales & PR mission in Montreal and the UK, and appointments at the Travel Media Association of Canada annual conference.
- Showcased the destination's wellness-themed enticements to local and drive market media via a promotional preview event spotlighting Eudemonia, a new transformational event coming to The Palm Beaches in November 2024.
- Enhanced the current Crisis Communication Plan to reflect a more comprehensive communications approach with the goal of staying nimble regarding weather situations, as well as geopolitical and economic variations that can impact visitation.



Elevate Sales Performance

Meetings and Conventions:

- Achieved an 8% YOY increase in contracted group room nights and boosted economic impact by 28%.
- Implemented a strategic short-term group incentive plan, securing 73,746 room nights for the year.
- Designed a local referral program, 'Keep it in the County,' to retain leads within our area, prevent them from going to competitors, and boost compression while elevating the overall rate.
- Contracted over 280,000 group room nights for future years, generating over \$100 Million in direct spend.
- Procured customer data information through participation at Travel & Adventure shows increasing travel trade database and consumer marketing intelligence.
- Secured the transformational event, Eudēmonia, during need period dates to boost YOY occupancy and Revenue Per Available Room (RevPAR) for the destination.
- Increased YOY actualized hotel room nights and generated over \$500,000 in economic impact from The Pink Retreat during a critical need period, highlighting the diversity of the county.
- Developed the Discover The Palm Beaches Fashion Show with local thought leaders like Amanda Perna and Azul Fashion, reaching over 500 customers, and securing \$100,000 for PCMA's foundation demonstrating our commitment to community engagement and social impact.



Leisure Sales:

- Implemented seasonal leisure sales campaigns to create awareness while securing 50,064 room nights, \$18 Million in revenue and nearly 1.2 Million in impressions from Amadeus (formerly TravelClick) global distribution systems.
 - Expanded leisure seasonal campaigns with Travelport–global distribution system securing over 36,000 room nights, \$10.5 Million in room revenue and 1.5 Million impressions.
 - Utilized a strategic partnership with the Incentive Research Foundation (IRF) to broaden our international presence in the MICE market and enhance brand visibility through the creation of a white paper.
 - Leveraged trainings, education, sales activations and trade efforts to support the increased overall international visitation by 10% and direct spend by 8%.
 - Led the collaborative development with MarTech in the creation of The Palm Beaches Travel Agent certification program, certifying over 50 travel advisors.
 - Conducted 15 domestic experiential virtual training courses for over 750 key travel advisors highlighting The Palm Beaches Collection.
 - In collaboration with the marketing team, increased the reach and impact of the international representation firm’s ability securing over 123.5 Million impressions from travel trade and consumer marketing.
 - Directed TL Portfolio to capture greater domestic market share from key feeder markets through newsletter creation, partner roadshow client opportunities yielding room nights and revenue generation.
 - Capitalized on a strategic partnership with Global Distribution Systems (GDS), resulting in an increase in definite room night production.
 - Collaborated with Hotelbeds to boost summer leisure business from Canada, UK and Germany securing 5,000 room nights, elevated brand awareness with over 15,000 total impressions and generated \$149,088 in room night spend.
-

Destination Services:

- Generated over \$1.1 Million in economic impact for FY2024 as a result of FY2023 Destination Review attendees.
- Conducted 8 Destination Reviews, attracting over 110 participants while securing 140 new lead opportunities for the destination.
- Secured over 130,000 definite room nights from conducting over 150 site inspections.
- In collaboration with PalmTran, supported the Community Transportation Association of America’s annual meeting, which highlighted the destination’s accessibility and achieved record attendance for the group.
- Collaborated with Brightline to execute Destination Review for planners from the Florida market, showcasing the destination’s ease of accessibility.

Ensured Organizational Sustainability

- In conjunction with the Tourist Development Council and Palm Beach County, the first ever Tourism Master Plan for The Palm Beaches was launched, a 20-year roadmap aimed at improving visitor experience, fostering sustainable tourism and optimizing economic impact. Initial steps completed have been familiarization tours of over 80 sites, gathering all historic background data from last 10 years and conducting initial stakeholder interviews.
- As a member of the 2nd convention center hotel selection committee, Discover The Palm Beaches participated in the selection of the developer which will propel The Palm Beaches as a mid-tier convention destination.
- As per strategic approach on revenue optimization, Destination Demand™ was leveraged to optimize performance among hotel properties through weekly staff meetings and bi-monthly partner status updates resulting in overall destination rate integrity with rampant discounting among Florida peers.
- Grew bed tax collections to \$86 Million through effective tourism promotion and strategic initiatives in highly competitive environment due to a leveling off in travel demand and challenging consumer mindset due to inflation.
- Developed communication tools detailing the ROI of destination marketing on bed taxes and potential losses in economic activity ensuring broader understanding about the value of destination promotion.
- Validated organization cultural enhancement efforts through a 90% satisfaction rating on the Annual Employee Opinion Survey.
- Implemented a methodical critical skills development training schedule for staff in the areas of Work/Life Balance, Public Speaking, and Leadership.
- Developed a comprehensive training program for Generative Artificial Intelligence and Large Language Models (ChatGPT, Copilot, etc.) to equip staff with the knowledge and skills required to integrate AI into strategies and executions effectively.
- Completion of curriculum for the Certified Tourism Ambassador (CTA) program.





Improved Alignment & Community Engagement

- Developed a first-time Advocacy landing page on ThePalmBeaches.com featuring content, video, blog, and infographics.
- Conducted more than 50 advocacy-related meetings and events to increase awareness in building support for Discover the Palm Beaches' efforts.
- Successfully worked together with Palm Beach County Legislative Affairs, Palm Beach County Legislative Delegation, and Destinations Florida to protect Tourist Development Tax funding from substantial distribution changes.
- Created a new CRM database for over 100 advocacy stakeholders.
- Generated over 8 million impressions through native ads on ThePalmBeaches.com for Community Business.
- Increased Discover eNewsletter mailing list by 13%.
- Coordinated & executed the 2nd The Palm Beaches Hospitality & Tourism Career Day with 7 local high schools, impacting over 50 students, in collaboration with The Boca Raton.
- Conducted the 2nd The Palm Beaches Hospitality & Tourism Job Fair with 44 employers and over 150 job seekers.
- Coordinated & executed 13 in-person Partner events with over 600 participants.



Awards

Marketing:

YouTube

Silver Content Creator 2024

VISIT FLORIDA Flagler Awards

*Silver - Sustainable Marketing Campaign:
Sea to Preserve*

Sales:

Northstar Stella Awards

2024 Gold Winner for Best CVB/DMO (Southeast)

Prevue Magazine Visionary Awards

*Gold - Best U.S. Destination for Incentives -
Small (under 500,000 population)*

*Bronze - Best CVB/DMO Meeting & Event Planner Support
(Southeast Region)*

Smart Women in Meetings

Hall of Fame: Kelly Cavers

Industry Leader: Aly Fernandez

Black Meetings & Tourism

2024 APEX Award for Distinguished Service: Maxine Jemison

Florida Society of Association Executives

Leadership Award: Brandon Hall

Smart Meetings

Catalyst Award Winner, November 2023: Robin Prakash

Meetings Today

Best of 2024 South CVBs/DMOs



Strategic Direction & Objectives

In February 2024, Discover The Palm Beaches (DTPB) held a strategic planning session with the DTPB Board of Directors and the executive leadership of the Tourist Development Council (TDC) agencies. This session featured key presentations from staff, as well as industry experts on tourism trends, economics and artificial intelligence. Following the completion of the 2021-2023 Strategic Plan, the focus of this session was to craft a bridge plan for DTPB to implement until the finalized Tourism Master Plan was in place, scheduled for completion in late 2025.

The following Strategic Pillars were identified for 2024 and 2025:

Revenue Optimization

The Palm Beaches experienced a surge in demand post-pandemic with record levels of visitation and room night demand beginning over the late spring in 2021. This resulted in record performance from both demand and revenue over the 2022 calendar year. A leveling off in demand has set in over 2023. As such, the main objective in this environment is to protect market share and revenue.

Organization and Destination Development

The FY2023 business plan included some key initiatives that DTPB and its board have foreseen as critical components for the future success of the destination. These core projects, most notable the Tourism Master Plan, will be driven forward for completion in 2025.

Collaboration

Success of DTPB hinges on its ability to collaborate across TDC Agencies, stakeholders, and residents.

Advocacy

In an era of declining public support and increased need for transparency, it is more essential than ever for destination organizations to make an emotional and value-based appeal, supporting their message of ROI with the case for how their organization supports the people of the community with new opportunities for work, economic development, and public services.

Social Inclusion and Sustainability

There are many critical social issues the destination marketing and management organizations need to address. Social Inclusion is first identifying the key issues relevant to The Palm Beaches and developing specific strategies to address each issue. These areas include Diversity Equity and Inclusion, Accessibility, Environmental Sustainability and Quality of Place.

Core Strategic Pillars for 2024 & 2025



Revenue Optimization

Sales

Marketing

Partnership



Organization & Destination Development

Master Plan

PBCCC HQ Hotel

MarTech

Events

CTA

Talent



Collaboration

TDC Agencies

Community Stakeholders

Residents



Advocacy

State

County

Cities



Social Inclusion & Sustainability

Diversity, Equity, Inclusion

Accessibility

Environment

Quality of Place



Strategic Direction & Objectives

In alignment with our strategic vision, we have set forth a series of ambitious Organizational Objectives that we aim to achieve by the end of 2025. These objectives are meticulously designed to protect our market share throughout 2024 and position our destination for significant growth in 2025. By focusing on these key goals, we aim to enhance our competitive edge and ensure long-term success.

Revenue Objectives	2022	2023	2024 (f)	2025 Goal
Grow visitation to The Palm Beaches	9.3M	9.5M	9.6M	9.7M
Increase RevPAR	\$172	\$171	\$172	\$175
Grow Non-Public Revenues	\$527K	\$647K	\$825K	\$850K
Economic impact of events	\$127M	\$164M	\$190M	\$200M
Organizational /Destination Development	2022	2023	2024 (f)	2025 Goal
Drive More Hotel Room Night Revenue	\$1.2B	\$1.2B	\$1.22B	\$1.3B
Maintain Market share (Hotel Room Night Rev)	5.0%	5.1%	5.1%	5.1%
Attribute at least 40% of Hotel Room Nights Sold to DTPB	33%	40%	40%	40%
Collaboration, Advocacy, Sustainability, DEIA	2022	2023	2024 (f)	2025 Goal
Increase tourism spending (EI)	\$6.9B	\$7.1B	\$7.15B	\$7.3B
Resident Sentiment	73%	73%	73%	75%
Increase Visitation from Diverse Markets	14%	12%	13%	14%



KRAVIS CENTER FOR THE PERFORMING ARTS



DTPB Innovation Grid

The following Innovation Grid is the basis of the FY2025 Business Plan. It is 9 essential elements with a foundation focusing on talent development to drive forward these critical developments. The Innovation Grid will command most of the Discover The Palm Beaches time, talent, resources and creative thinking to fully execute our yearly plan.

DTPB INNOVATION GRID		
Master Plan	CC District	MarTech & Destination Demand
Sustainable + Accessible Tourism	Social Inclusion	Advocacy / Community Engagement
DMAP Accreditation	New Group's Booking Window Trends	Brand / PR Evolution
Talent Development		



DTPB Innovation Grid

1. Master Plan

In July 2024, the Tourist Development Council began the creation of a Master Plan for Tourism, which is expected to be completed by the end of 2025. For more details, refer to the following section: 'Tourism Master Plan.'

2. Convention Center District

In 2023, an RFP was issued for the development of a 2nd HQ hotel at or near the Palm Beach County Convention Center. In early 2024 a developer was selected to build a hotel. A hotel with 400 rooms should be completed in 2027. This will significantly change the landscape for the convention center district, allowing for larger room blocks and fewer hotel contractions per event. In anticipation of this, key sales strategies must be developed over the FY2024.

3. MarTech & Destination Demand™

Destination Demand™ has been the key to success. It is a tool which has been developed and utilized over the last year providing weekly performance forecasts for the next 6 months. Destination Demand's ability to identifying critical need periods with DTPB's process to take specific actions and partner engagement has been proven to improve overall performance in the destination. MarTech will provide the foundation necessary to futureproof DTPB's ability to effectively promote the destination, understand future performance, and track campaign effectiveness.

4. Sustainable tourism is essential for ensuring that the travel industry can continue to thrive while protecting and preserving the natural, cultural, and social environments that make destinations unique and attractive. **Accessible tourism** is crucial for creating inclusive and equitable travel experiences. It ensures that all individuals, regardless of their physical, sensory, or cognitive abilities, can participate in and enjoy tourism activities.

5. Social Inclusion is vital for ensuring that travel experiences are accessible, equitable, and beneficial for all members of society. The benefits of social inclusion include broadening market reach, enhancing visitor experiences, fostering a culture of understanding, preserving heritage, and increasing economic benefits for the community.

6. Advocacy/Community Engagement

Community engagement and advocacy efforts will provide the framework for our Destination Business Plan to secure support for DTPB initiatives and the Tourism Master Plan. By building relationships with local stakeholders and residents we can communicate and develop continued efforts to improve the quality of life for residents while simultaneously sharing our community with visitors.

7. New Group Booking Window Trends

Trends suggest the group travel segment is projected to reach over \$190 billion by the end of 2024. However, the landscape has shifted in planning. The booking window has shortened ranging from a few weeks to less than a year for groups with less than 1,000 attendees. Speed to market and incentives with flexible terms will be an important effort to secure and capture greater market share.

8. Brand/Public Relations Evolution

The primary mission of DTPB is to be the steward of The Palm Beaches' greatest asset: the brand. Great tourism marketing provides the voice of the destination, representing our community to the world. Utilizing tailored PR & Communications strategies, highly-customized Social Media, fully-integrated Marketing & Advertising and revolutionary Marketing Technology, our mission is to enhance the entire visitor experience. Brand evolution is a cornerstone of The Palm Beaches' marketing strategy, ensuring the destination remains vibrant, relevant and compelling to travelers from around the world.

9. DMAP Accreditation

Destination Marketing Accreditation Program (DMAP) is a globally recognized program that defines quality and performance standards in destination marketing. Discover The Palm Beaches was first accredited in 2008. Accreditation is for 8 years with a 4-year renewal. This will mark the 3rd re-accreditation for DTPB. To become accredited, a destination organization must demonstrate compliance with more than 100 performance standards. Accreditation standards are set by an independent panel of industry veterans representing a diverse selection of destination organizations. Standards are regularly revisited and revised to reflect the evolution of best practices in our industry.

10. Talent Development

Ensuring that our organization's values and staff are constantly evolving and growing to meet current and future needs will be critical to accomplishing our mission. We are committed to offering our team the training and support needed to foster inspiration, and to stay motivated and equipped with the latest education on topics related to our industry.

Tourism Master Plan

On July 1, 2024, the Tourist Development Council (TDC) launched a Tourism Master Plan which will take approximately 18 months to complete. This is the first time Palm Beach County will conduct a study like this that will create a 20-year roadmap for the future of tourism.

Core issues this study will address are:

- How to broaden visitor appeal by considering their expectations
- Identify new and diverse markets
- How to deliver sustainable and inclusive projects and experiences for both visitors and residents
- Identify core components critical to the economy and determine how to maintain growth
- Develop the right performance indicators around community needs
- Identify capital and infrastructure improvements
- Ensure residents quality of life and place are enhanced
- Link the plan to broader economic and community plans

This is a collaborative project with the County, Cities, Residents, and all stakeholders. Discover The Palm Beaches, as a TDC Agency, will play a key role in this project's development. As this project started during the 2024 FY, DTPB has already facilitated a tour of 80 sites within the community to provide an overview of the vast tourism products that currently represent The Palm Beaches. More than 100 community members have been initially interviewed as part of the project planning and research process. Stakeholder and resident engagement have been the core focus of the initial stages. More community outreach will happen during the duration of the project. Benchmarking of The Palm Beaches, TDC and its agencies has been ongoing and fully underway.

During the 2025 fiscal year the following assessments will be completed:

- Destination branding, marketing, and messaging
- Diversity, Equity, and Inclusion
- Sustainability

A full situational analysis will be completed which will guide a visioning workshop and construction of the Master Plan. Once completed, community groups will be re-engaged to finalize the plan. The entire project will go beyond the 2025 fiscal year being completed at the end of the 2025 calendar year.

The final Master Plan will contain a 20-year vision for tourism in The Palm Beaches with a clear description of recommended initiatives for the county and municipalities. Detailed plans will include a timeline for implementing each recommendation. Organizations and individuals that should be involved as well as organizing appropriate resources to complete each item. Finally, key performance indicators and performance metrics will be established to monitor progress and success of the plan.







Strategies & Tactics

Brand Evolution & Marketing

Transforming The Palm Beaches Visitor Experience;
integrating meaningful Brand Evolution with revolutionary
Marketing Technology.

Lead: SVP Marketing; AVP Digital & MarTech; Director Social Media; Director Integrated Marketing; Director PR & Communications

Collaboration: Flagler Business Advisory Board, Domestic PR & Creative agency of record, International PR agencies of record



Integrated Marketing

Expand ‘The Palm Beaches Collection’ marketing campaign to fully immerse The Palm Beaches as Florida’s Most Stylish Vacation Destination

- Enhance creative among ad sets including brand pillars Beaches & Outdoors, Arts & Culture, Shopping & Fashion, Culinary, Spa & Wellness, Sports & Golf, Family Attractions.
- Position out-of-home units near museums and major fashion districts in key markets to align with campaign theme and coordinate print advertising to align with reputed travel, lifestyle and fashion publications’ style-themed issues.
- Partner with designers, retailers or fashion brands to create unique co-branded collections that tie in with The Collection including dedicated emails, advertorials and landing pages.
- Highlight the culinary brand pillar with key partnerships with James Beard Foundation and explore Michelin Guide opportunities to showcase destination restaurants.
- Explore the curation of a high fashion photo shoot incorporating AI design for advanced content creation and utilize AI to provide personalized style recommendations based on consumer’s curated vacation itinerary.
- Prioritize top ten origin markets while expanding marketing campaigns in second-tier markets to enhance awareness and grow visitation in emerging cities.

Grow Groups & Meetings Marketing Strategies, including Between-The-Sessions brand relaunch and enhanced Convention Center District awareness campaigns

- Create new marketing assets aligned with The Palm Beaches Collection encouraging meeting planners to “Curate Elevated Between-The-Sessions Experiences.”
- Launch new photography and video assets to expand existing library.
- Refresh the Meeting Planner Guide with a new look and feel.
- As a result of 2nd headquarter hotel at the convention center, build a robust campaign to drive demand for future group bookings to the Convention Center District including PR in trade publications, LinkedIn social media and paid media through print and targeted email in key publications.
- Host Meetings, Incentive, Convention & Exhibitions (MICE) Familiarization (FAM) tours with journalists from appropriate publications, spotlighting the destination’s ease of accessibility and unique waterfront and sustainability-themed meeting space options.



Champion sustainability efforts with campaigns and content to align with the Global Sustainable Tourism Council through the Tourism Master Plan initiative, while exploring opportunities with the UN Sustainability Goals

- Expand the Sea To Preserve initiative by securing a local sponsor and introducing additional PR/media efforts to the campaign.
- Prepare an electric vehicle (EV) road trip itinerary focused on sustainable attractions with popular charging spots, highlighting the nearby amenities that visitors can enjoy while charging.
- Highlight Palm Beach County's distinction as one of the highest aggregations for sea turtle nesting in the world by researching title of "Sea Turtle Capital" to support our environmental efforts.

Reaffirming The Palm Beaches position as a leader in Social Inclusion and Accessibility, focusing on 'Access First' to improve quality of place and life for both residents and visitors

- Amplify our accessibility message by implementing a communications plan and custom campaign for content creation, further website enhancement and media partnerships.
- Continue as a Travelability Destination Ally member as a leader in the tourism space, with inclusion in print and digital opportunities in the Accessible Journeys publication.

- Expand Wheel the World partnership to assess and verify 50 additional accessible locations in The Palm Beaches including hotels, attractions, restaurants, beaches and more.
- Engage our community by partnering with accessible organizations to gather all programs across The Palm Beaches in a centralized place to tout efforts.
- Strengthen resources and data with a study on the economic impacts and ROI of accessibility on visitation, while evaluating existing resources and goals.
- Foster industry knowledge with ongoing training through the CTA and Travel Trade platforms and through toolkit development for businesses.
- Explore and understand the needs of travelers and residents with accessibility needs with focus on deaf/hearing-impaired and sensory communities by leading efforts in research, and local community and business partnerships.

Elevate tourism from international markets by further developing custom, multi-lingual strategies and championing brand consistency in key countries

- Prioritize key markets including Canada, UK, Brazil, Germany and Colombia to capture visitation with a consumer media strategy across Traditional, Digital, PR and Social Media.
- Onboard the selected Leisure Sales & PR representation firms at completion of an RFP process across the international markets for FY25 contracts.
- Enhance the partnership with BrandUSA during Winter 2024/2025 targeting Toronto and Montreal travelers.



- Further promote Brightline connectivity from MIA and MCO airports into The Palm Beaches with robust OOH and targeted campaigns in international terminals.
- Develop proposed South Florida itineraries for international travelers that includes The Palm Beaches as a stop during 1-2 week stays.

Continue to enhance strategic partnerships to drive visitation and align The Palm Beaches with key, well-known brands, destinations and events

- Work with key partners including Visit Florida, Brightline and Brand USA to expand national and international reach through co-op campaigns and strategic marketing alignment.
- Build on City Partnerships to highlight all 39 cities by supporting key events and overarching tourism development strategies, including the Boca Raton Centennial and City of West Palm Beach tourism brand launch.
- Elevate brand pillars through transformational events in the destination, including Eudemonia and The Pink Retreat, to grow awareness and attendance in need periods.
- Strengthen event support & underwriting in the community by aligning with key events focused on destination priorities such as social inclusion, culture, family, sustainability and accessibility, while incorporating brand activations to drive engagement and build first-party data.
- Maximize sports partnerships with Miami Dolphins and Spring Training teams, and explore new partnerships with other destination events and activations.
- Activate responsive marketing strategies with Online Travel Agent (OTA) partners to drive Destination Demand™ in key need periods with active forecast monitoring and hotel partnerships in key segments.





Refresh the 'Love The Palm Beaches' resident engagement campaign to empower the community to be our brand ambassadors to drive off-peak season visitation from friends & family

- Launch resident advocacy program in partnership with the Certified Tourism Ambassador program and develop brand ambassadors as a street team for activations and events to represent the residents and our community.
- Commission mural and art pieces in high-traffic locations to have a permanent activation space to engage residents and visitors.
- Work with local restaurants to develop Love The Palm Beaches-inspired drinks, dishes or desserts and promote throughout social media.
- Provide engaging stories from within the community including resident features and pet of the month features to highlight diversity of people and places throughout The Palm Beaches.
- Develop exclusive resident perks and events with local businesses with pop-up programs, discounts and workshops to build community awareness of positive tourism impacts.

Conceptualize an AI mascot for The Palm Beaches to act as a brand ambassador and guide across multiple touchpoints for visitors

- Explore use of an elevated mascot to highlight the genuine history of hospitality, style and architecture in the destination, custom designed by an artist to match brand personality.
- Integrate the illustrated mascot across marketing technology, including AI chat function, mobile app and visitor information kiosks.
- Include the mascot in illustrated maps and host a series of artwork around the county to engage families with a scavenger hunt of key attractions and destinations.
- Develop a line of promotional materials and merchandise to engage visitors at activations with unique souvenirs only found in The Palm Beaches.



Marketing Collaboration with TDC Agencies

Enhance content and messaging around the Sports brand pillar in partnership with the Palm Beach County Sports Commission to develop co-marketing efforts with event promotions, activations, & partnerships

- Develop event plan surrounding World Cup 2026 to capitalize on South Florida's share of attention by working with TDC partners, FIFA, Brightline and destination partners to concept a fan event.
- Explore MLS partnerships in target markets to highlight The Palm Beaches as a soccer fan destination.
- Enhance the Ultimate Week of Sports programming lineup with robust marketing surrounding signature sports Tennis, Polo, Equestrian, Spring Training Baseball and Golf, including the Cognizant Classic and new TGL golf.
- Craft opportunities with the US Polo Assn. to highlight "POLO," a new Netflix documentary series to capitalize on "set-jetting" trend with focus on signature Equestrian lifestyle in The Palm Beaches.
- Generate Pickleball content surrounding the lifestyle of the sport and include in next photo shoot for The Collection.
- Maintain monthly Destination Demand™ meetings with Sports Commission to maximize short-term booking opportunities, attendance building initiatives, and understand future event pacing.

Strengthen awareness of in-destination video content and broadcast opportunities with the Palm Beach County Film Commission

- Partner for content sharing and integration into The Palm Beaches social channels and media assets, while integrating key stakeholders into The Palm Beaches Now watch parties.
- Align on broadcast partnership opportunities on key brand pillars including Wellness and Shopping/Fashion to explore new show development.
- Develop opportunities to extend The Palm Beaches TV reach with additional partnerships across key hotels, Visitor Information Centers, transportation hubs and key airline in-flight partnerships, in collaboration with Community Engagement department.
- Support relaunch of the two new social media channels, featuring Palm Beach County Film Commission and The Palm Beaches TV individual pages.
- Explore co-op marketing opportunities with inclusion on website and email assets, and integration into key consumer events.





Expand the Arts & Culture brand pillar by strengthening relationships with partners and align efforts with the Cultural Council for Palm Beach County

- Promote Cultural Council's annual MOSAIC & Open Studios initiatives in May 2025 to expand reach and drive room nights.
- Host a joint cultural Media Mission in New York City to reach key media and social media influencers for future pitching efforts and storylines.
- Create additional online resources to promote the Black Cultural Heritage Trail and support awareness of the new cultural attraction across the destination.
- Explore partnership surrounding Art Basel Miami to reach high-net-worth consumers to encourage pre- and post-stays in The Palm Beaches.
- Integrate a Brightline partnership to promote cultural tourism and continue The Palm Beaches' awareness as Florida's Cultural Capital.
- Activate with the Historical Society of Palm Beach County exhibit "Wish You Were Here: Tourism in The Palm Beaches" to highlight the history of hospitality and tourism in the destination.

Continue strong support of expanded airlift with Palm Beach International Airport to generate inbound visitation to The Palm Beaches' premier airport

- Continue to support existing high-value inbound routes based in Houston (HOU), Los Angeles (LAX), Chicago (ORD), Minneapolis-St. Paul (MSP) and Denver (DEN), Dallas (DAL, DFW) among others.
- Expand route support to include Islip (ISP) and LaGuardia (LGA) based on increased carrier service.
- Support Porter and Air Canada expanded routes during peak season between PBI and Toronto-Pearson (YYZ).
- Host airline-supported ticket giveaway contests on ThePalmBeaches.com landing pages and promote via targeted paid social campaigns. Gather first party data to strengthen marketing efforts and build consumer profiles.
- Through dedicated PR efforts, help to promote the airport's modernization construction and expansion of Concourse B, including the emphasis of its sensory room for travelers with autism and adult changing tables to accommodate the needs of passengers with disabilities.

Digital & Marketing Technology

Complete build-out of Marketing Technology stack to support strategy, paid media, analytics, forecasting, business intelligence, and hotel demand generation

- Refine the elements that launched in 2024: cloud hosting services, data management fabric, data sharing fabric, strategy layer, and measurement layer to ensure full integration with the rest of the Marketing Technology stack.
- Enhance customer data management approach to build robust customer journeys across all activation channels leveraging first and second party demographic/psychographic attributes to personalize experiences.
- Launch secure data collaboration environment to share data within the tourism community.
- Secure data privacy compliance and honoring of opt-out requests across all marketing touchpoints to align with consumer expectations and privacy laws.
- Ensure robust data governance and documentation across the Marketing Technology stack.



Exceed the demands of changing consumer paths-to-purchase when seeking travel inspiration, planning, and in-destination engagement through digital platform enhancements

- Integrate website personalization with Marketing Technology stack to ensure the most relevant content for an individual user is served.
- Refine AI chat functionality to provide highly personalized and customized travel planning assistance and robust information for travelers in-destination.
- Complete mobile application, leading with AI chat feature, to serve as an in-destination resource for consumers while collecting robust first party data.
- Build website map functionality for users to better understand the location of key assets within the destination.

Optimize in-house digital ad buying platforms, capabilities, and best practices to drive brand awareness, consideration, and visitation

- Streamline platforms, tactical allocations, data providers and direct publisher relationships to improve performance YOY.
- Enable creative personalization, content sequencing, and identity resolution for connected TV, audio, and display tactics.



- Implement advanced fraud detection and prevention capabilities across all channels & mediums to ensure intended audiences higher propensity of engaging with advertising.
- Enhance in-house reporting capabilities utilizing new marketing technology capabilities to better measure the impact of all paid media efforts across digital, traditional, social media and PR.

Drive hotel demand during need periods through the progression of the Destination Demand™ tool with advanced forecasting, testing, campaign execution, and content personalization

- Enable secure data sharing with the tourism community to improve impact on need periods.
- Further personalized offers based on consumer profile attributes and accommodation types/categories to drive conversion.

- Refine offer booking and travel windows, types of deals, and segmentation to appropriate audiences.

Adapt to the expanding data deprecation environment by prioritizing first party data growth and ensuring demographic and psychographic data points are available for engaged audiences

- Develop value proposition-based website authentication strategy to deanonymize website users.
- Execute focused advertising efforts on consumer database growth.
- Ensure robust support for the wider organization contributing to first party data growth via contests and activations.

Social Media & Content Production

Launch all-new engaging video series to tell the destination brand story in an entertaining format

- Publish a Weekend Itinerary featuring top recommendations for accommodations, dining experiences, and attractions, prioritizing partner offers.
- Showcase Free Things To Do with a mini video series developed from the most popular blogs on ThePalmBeaches.com, highlighting the top free/nearly-free things to do in The Palm Beaches.
- Develop a What's New sizzle series featuring new hotels, recent hotel renovations, new restaurants and attractions, as well as updates from existing partners with new offerings.
- Maximize content consumption through Trending Content series featuring relatable content tactics, such as trending topics and sounds, through the lens of The Palm Beaches tourism offerings.

Innovative Influencer partnerships to assist in telling The Palm Beaches brand story

- Target luxury travel agents who are also influencers to drive immediate booking conversions, in partnership with Leisure Sales team.
- Explore partnership opportunities with local athletes in key sports such as golf, tennis, equestrian and potential NIL deals with Florida Atlantic University and other college athletics.
- Create an influencer retreat that showcases a full trip itinerary including diverse golf offerings in The Palm Beaches and post-golf activities such as breweries, culinary, mini-golf and driving ranges, nightlife and wellness experiences.
- Support The Palm Beaches Collection Campaign by customizing itineraries based on influencer results of The Palm Beaches Collection Quiz.
- Host diverse influencers from each targeted international market, as well as accessibility, social inclusion and sustainability champions.
- Team up with PR to create joint media and influencer destination FAMs surrounding key pillars such as Diving & Boating and Wellness to gain maximum exposure through combined press and social channel coverage.





Continue success of enhanced social media tactics leveraged to gain record-breaking views and follower growth with key strategies

- Generate fully-customized content per social media platform to engage different audience segments more effectively and improve algorithm compatibility.
- Create engaging blogs and blogger partnerships in multiple languages to reach a wider audience and continue to integrate with digital paid social and native strategies.
- Grow visual assets library and sharing with third parties including community partners, key stakeholders, sister agencies, signature events and more to gain additional exposure on social media.
- Prioritize drone captured photo and video assets to showcase the destination from a unique perspective.
- Extend effective use of Instagram's Collaborate feature to reach a new audience on social media, leveraging the power of partnerships to reach new followers.

Prioritize engagement across all social media channels to combat changing social media behavior to keep visitors immersed in The Palm Beaches content

- Develop AI generated content and marketing assets for engagement to showcase our destination and optimize usage of new AI tools with innovative partners.
- Create enticing contest-based programs gifting tickets to signature events and staycation packages to highlight key itineraries.
- Leverage private Facebook group "Love The Palm Beaches" to further increase organic engagement by encouraging partners, influencers and travelers to post and share their experience in The Palm Beaches.
- Repurpose viral content and posts across all platforms to boost engagement.
- Activate seasonal content to insert the destination into cultural themes and resonate with audience mindsets.

Public Relations & Communications

Infuse strong storytelling through media relations efforts, press releases and pitching to grow visitation through earned media awareness

- Craft and disseminate compelling storylines that highlight the unique attractions and experiences of The Palm Beaches, via one-to-one media outreach and pitching as well as traditional press releases.
- Secure new broadcast opportunities across major networks to expand reach of The Palm Beaches to a national audience, leveraging authentic and “hidden gem” experiences to the decision-making TV producers in order to grow destination visibility and competitive edge.
- Emphasize topics that are of particular media interest, including sustainability and responsible tourism, using enriched pitches and enhanced b-roll.
- Conduct a minimum of two Satellite Media Tours with appropriate themes that amplify the destination, its offerings and its brand promise.

Strengthen relationships with residents and businesses through local outreach and communications emphasizing the benefits of tourism and encouraging community awareness of promotional activities

- Encourage participation and community engagement in the Tourism Master Plan project by highlighting the benefits of local resident awareness and feedback.
- Enhance community support for tourism initiatives by demonstrating the positive effects of tourism through frequent pitching to highlight visitation and economic impact benefits.
- Grow relationships with local media through thought leadership interviews, deskside appointments and networking events to secure position as key source for travel and tourism trends and storylines.





Support international visitation growth through strategic communication outreach, leveraging the specialized expertise of in-market international agencies in Canada, UK, Brazil, Germany and Colombia

- Continue cadence of newsworthy pitches globally to create the most engaging narrative that will resonate with target journalists.
- Utilize data as feedback to focus on the markets that provide the largest ROI of visitors for PR efforts, such as the robust growth of the Brazilian market, to capture earned media and secure journalists for FAM trips in destination.
- Elevate the Canadian markets of Toronto and Montreal through relationship building and enhanced outreach to highlight strong airlift into the destination.

Implement strategic FAM trips that target reputable and prolific travel journalists from well-known publications in key source markets

- Generate authentic and persuasive content that resonates with potential visitors and develop comprehensive itineraries to showcase exclusive experiences that set the destination apart from competitive destinations.
- Leverage existing relationships with media outlets and build new relationships with freelance and in-house journalists through target market media missions.
- Strategically schedule FAM trips in the summer season, when availability is more flexible, and partners are eager to showcase offerings.
- Partner with new, less-frequently utilized local businesses to offer experiences that highlight the off-the-beaten path experiences to influential travel writers.
- Thought leadership strategies for key leadership team members and sales team.

Group Sales, Destination Services & Leisure Sales

A balanced, integrated approach comprised of group business development (meetings/conventions/events), in conjunction with strengthening travel trade relations and leisure sales business opportunities to enhance overall destination performance and minimize seasonality.

Lead: Chief Sales Officer, VP of Group Sales, VP Leisure Sales, AVP of Destination Services

Collaboration: with global representation firms in addition to Flagler Business Advisory Board and Senior DTPB Staff, county economic development organizations – Business Development Board (BDB), Chambers, Convention Center District taskforce, and Downtown and Community Development authorities/organizations.



Increase Sales Efficiencies and Production

Balance and synergize leisure, business transient and group sales efforts to maximize occupancy and revenue while reducing overall cost

- Expand face-to-face engagement to increase market share for both group and leisure from following market segments.

DOMESTIC

New York area

Washington D.C.

Chicago

Florida

Atlanta

Dallas

Houston

INTERNATIONAL

Canada

UK

Brazil

Germany

Colombia

- Leverage the combined sales efforts of the group and leisure sales teams in key markets, and execute targeted combined Destination Reviews.
- Leverage technology platforms and CRM upgrades during sale and trade activities to expand targeted client database and client market intelligence while increasing our speed to market.
- Utilize Destination Demand™ insights to continue implementation of short-term sales strategies and tools.
- Navigate industry disruptors and capitalize on growth opportunities by conducting deep dives into emerging markets.

Utilize sales force as thought leaders to elevate The Palm Beaches Collection brand market presence and drive results

- Expand board presence and staff committee involvement within industry and community associations.
- Secure certification and accreditations by expanding internal and community sales training and development programs leveraging AI, prospecting efforts and advance selling practices.

Secure and expand events that represent the brand and transform the destination during need periods

- Secure and support the attendee growth of events such as Eudemonia, The Pink Retreat and others through strategically implemented sales and marketing initiatives, destination servicing tools and collaboration of community thought leaders and engagement.
- Research the development and possible acquisition of a new event in partnership with key stakeholders during critical need periods for the destination.
- Expand the footprint of already established and contracted events to increase economic impact throughout the county.

Increase Sales Efficiencies and Production

Increase the impact of visitor engagement through the customization of marketing and destination servicing tools

- Increase the length of stay through elevation and customized creation of “3 perfect days or extend your days in The Palm Beaches.”
- Curate destination reviews that highlight local events, sustainability, wellness, and diversity of the destination in partnership with other TDC agencies.
- Expand “Love The Palm Beaches” Campaign to meeting and leisure travelers to invite friends and family to come to the destination.
- Develop meeting attendee return promotion for summer leisure family vacation.
- Utilize MarTech and AI capabilities to enhance attendance building tools.
- Promote the new destination app to meeting attendees to create awareness regarding the destination’s offerings.
- Collaborate with the social media team to develop messaging that aligns with the interests of meeting attendees.
- Increase the presence of the mobile Visitor Information Center (VIC) at meetings and events to expand attendee awareness of the destination and local events.

Increase room night growth through emotional connection and authentic offerings, while elevating the client’s experience

- Develop a customer referral promotion to expand reach.
- Increase and elevate the promotion of customer testimonials and influencers.
- Expand and grow diversity of talent and engagement of the Customer Advisory Board to support marketing and sales efforts that will increase production for the destination.
- Create and implement an annual customer and partner recognition program that is celebrated within the community.
- Leverage site inspection surveys to implement change, education and elevate service levels.
- Enhance the ease and engage in new developments of socially responsible and diverse activities that leave an impact with both the business and leisure traveler.



Utilize industry and customer partnership to increase revenues and expand brand presence

- Increase partnership assets in trade and sales activities that support the needs of our community.
- Restructure and customize community participation opportunities to expand brand awareness.
- Broaden and maintain both industry and customer partnerships to expand target customer base and secure increased room night production with organizations like the following:
 - PCMA, ASAE, MPI, IAEE, IRF, SITE, FICP and AMCI
 - Maritz, HelmsBriscoe, Conference Direct, Prestige & Retreat Resources

Leverage destination enhancing infrastructure outcomes from Tourism Master Plan to strategically market and secure future sales

- Celebrate and introduce “What’s New” campaign to generate global interest with incoming renovations, venues, sporting events, festivals, management or ownership changes and new hotels and resorts in The Palm Beaches.
- Continue to educate and support the Tourism Master Plan, by showcasing destination assets and players to key stakeholders.



Leisure Sales

Expand global visitation through leisure trade efforts in a continued collaborative approach with marketing (PR, social, digital)

- Research, review and negotiate scope of work for third party representation firms within Canada, UK, Germany, Brazil, Colombia & Mexico.
- Proceed to increase domestic and international leisure room nights through trade opportunities and partnerships.
- Continue ongoing marketing efforts with tour operators, travel agencies and trade publications.
- Enhance educational components (webinars/training modules) with trade partners (tour operators, travel agencies and trade publications).
- Perform leisure sales activities (trade show, sales missions and DR's) to complement marketing and educational initiatives.
- Implement call-to-action strategies to confirm bookings and strengthen results tracking into the destination.
- Structure webinar series to incorporate marketing collateral and act as an additional educational resource for travel trade.
- Build relationships with leading travel agency groups, for further increase in room nights and revenue, i.e., Mexico focused destination review, targeted sales mission and training.
- Development of secondary domestic markets including Dallas, through a combined approach to reach trade, consumer and PR leveraging direct airlift into the destination.

Solidify incentive programs/campaigns with GDS to create awareness and generate room night conversion

- Continue to augment room night and revenue conversion from new and existing travel agencies in our core domestic markets, via enhanced GDS campaigns increasing awareness, visibility and conversion.
- Utilize GDS data to develop target trade account list and implement sales strategies to grow market share.

Execute international marketing campaigns to balance domestic seasonality curve

- Design and deploy timely marketing campaigns to support specific need periods and seasonality downturns through partnership trade relations.
- Impact seasonal visitation from international market through direct leisure sales efforts and call-to-action campaigns.



Leisure Sales

Amplify international representation firms and leverage capabilities for trainings, education, trade efforts and competitive benchmarking

- Reinforce international tour operator partnerships through Destination Reviews and leisure sales initiatives; encourage tour operators to increase their hotel product to account for The Palm Beaches' growing hotel product inventory.

Engage domestic representation efforts to maximize leisure demand from targeted travel trade organizations

- Expand market share from targeted feeder markets by focusing on new airlift opportunities and continued sales efforts.
- Implement calendar of quarterly joint educational opportunities with community partners to monitor trends and develop call-to-action initiatives.

Utilize international representation firms' competencies for education, trade efforts, airlift development and campaigns in Canada, Colombia, Brazil, UK and Germany

- Perform strategic events in Canada, Brazil, Colombia and UK with trade/consumers to push brand awareness and drive visitation.
- Impact seasonal visitation from international markets through a time sensitive sales activities schedule and call-to-action campaigns.

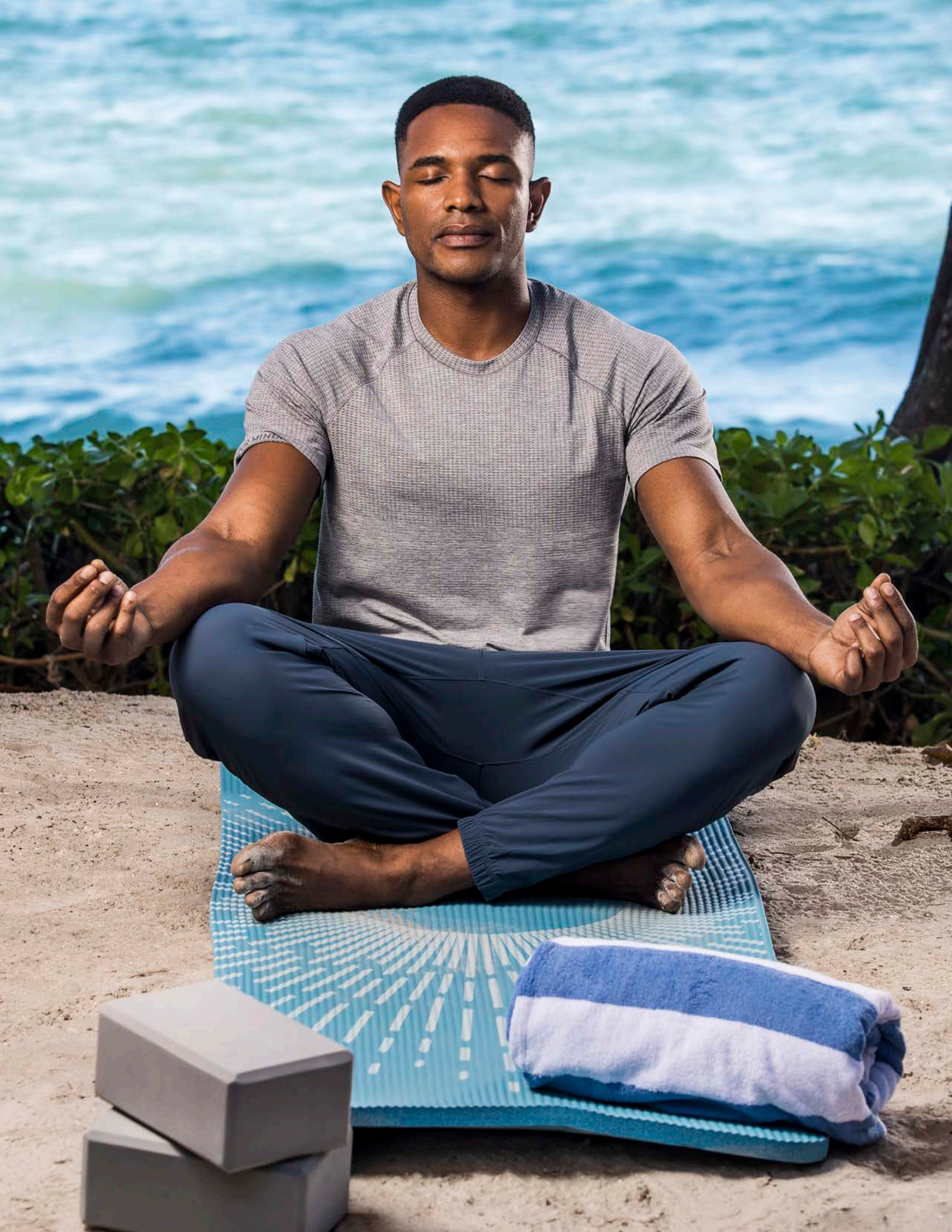
Increase domestic and international marketing impressions to grow room nights and revenue

- Continue execution of trade marketing campaigns with Hotelbeds, Travelport and Amadeus GDS systems while tracking performance and conversion.
- Monitor growth opportunities in global markets utilizing data, airlift, trends.

Implement strategic airline vacation packages to leverage product placement and training opportunities

- Establish key airline partnerships and inclusion of wholesale air packaging options.
- Introduce new hotel and attraction product to ensure placement opportunities.





Group Sales

Leverage destination brand and continue to curate passionate local thought leaders and signature experiences into client engagement tradeshow, site inspections and trade missions to differentiate The Palm Beaches as a premier meetings destination

- Deploy curated activations in key feeder territories including Florida, Texas, Illinois, Georgia, Toronto and the Northeast that reflect our destination brand messaging.
- Command themed destination reviews and networking opportunities for potential clients from our markets around signature and sporting events, in conjunction with our hospitality community, to showcase The Palm Beaches robust culinary and cultural scenes.
- Selective approach with participation at key industry-related tradeshow and events which foster relationship building opportunities that result in direct sales.



Leverage destination enhancing infrastructure as mid-sized convention destination to increase compression and room nights for the Palm Beach County Convention District

- Utilize prospecting tools with group data analytics to identify, tag and solidify organizations that match the needs of our current and future landscape. Select organizations who can optimize the Palm Beach County Convention Center and surrounding hotels.
- Develop and incorporate a rating system as standard practice when identifying key group programs that meet the best interest for the convention district. This program will be a grading catalyst to measure overall need and program economic impact.
- Continue to engage the region's economic development, relocations and start-up communities to gain insights and connections related to emerging and established vertical markets in our desirable industry clusters focused for the convention district. (Health Tech/Fintech/Advanced Manufacturing/IT/Technology/Life Sciences and Global Wellness).
- Embrace and market key groups and partnerships that will help propel targeted group segments and motivate clients to schedule/plan their meetings around these big events, ensuring larger attendance and attracting notable exhibitors and speakers, such as the Eudemonia event.
- Encapsulate all countywide diversity, equity and inclusion initiatives in destination proposals, prospecting and business development conversations.

Embrace technology initiatives that include a focus on organizational synergies, industry education, lead generation platforms for new prospecting efforts, bid books and group pace measurements

- Incorporate, educate and encourage participation from all partners in all new and emerging meeting planner sourcing platforms. I.e. CVENT Connect, Groups 360, HopSkip etc.
- Upgrade Simpleview CRM to harvest new emerging prospecting tools and meeting planner data.
- Continue to Scrub CRM to ensure all meeting planner organizations and contact information is current and up to date.
- Utilize CVENT to its maximum potential through continued co-op opportunities and suggestive ad campaign for DTPB and its entire hotel community partners.



Finance & HR

To achieve the destination and organization's vision, mission, strategies, and program goals over the long term, we must ensure that the human, financial and information technology resources are adequately sustained. Additionally, we must continue to enhance Board governance, advocacy efforts, team engagement, and community leadership alignment to ensure the organization's long-term relevance.

Lead: CFO and President & CEO

In collaboration with the Board of Directors



Corporate Culture and Talent Development

- Continue to apply HR best practices toward training, education, recognition, and onboarding to ensure continued development and retention of staff and the enhancement of organizational culture.
- Continually recognize and celebrate staff accomplishment to raise employee engagement.
- Conduct quarterly employee satisfaction surveys to gather feedback and identify areas for improvement.
- Continue enhancing and expanding communication channels between leadership and staff to ensure transparency and inclusivity.
- Continue offering various professional development programs, including workshops, online courses, and certifications.
- Expand upon the current mentorship program to foster knowledge transfer, succession planning and career growth.
- Implement leadership development programs to build a strong pipeline of future leaders.
- Continue to evolve the company's work policies to help employees maintain a healthy work-life balance.
- Introduce wellness initiatives such as mental health resources and annual screenings.
- Enhance annual and mid-year structured performance review process to align with department and organizational goals while providing regular constructive feedback.
- Continue to promote our effective use of the "bed tax" dollars to demonstrate the significant return of investment we provide which will build on the trust for our organization to help ensure future investment in developing tourism in sustainable ways.

Maintain financial sustainability by advocating for the protection of tourism promotion funding, implementing prudent reserve policies, contingency planning, and expansion of non-contract revenue sources

- Ensure all officials, elected, and appointed, as well as residents, understand the value of tourism promotion and destination management through the Advocacy Plan.
- Continue to refine the return on tourism investment messaging (infographics, video, social media, etc.) that communicates how tourism promotion generates tax revenue and enhances quality of place and life.
- Enhance and expand partnership programs and identify new non-contract revenue opportunities to augment bed-tax funding to amplify product content and marketing reach.

Community Engagement

Discover The Palm Beaches is committed to community engagement and advocacy efforts, focused on principles of economic prosperity, sustainability, and well-being. We market, sell, and connect to promote the destination, investing in economic growth, job creation, and quality of place and life while fostering lasting community relationships.

Lead: Associate VP Community Engagement & President & CEO

In collaboration with the Board of Directors





Community Engagement

- Continue to educate and transform perceptions about who we are as an organization, by highlighting that our efforts go far beyond that of a marketing agency. Not only do we highlight our destination experiences, but we also explain to policymakers and residents the economic power of the tourism industry.
- Ensure our leadership participation in the development of the Tourism Master Plan, by building and enhancing relationships with policymakers while also establishing representation on business leadership boards, advisory committees, and task forces at chambers of commerce, business associations, and governmental organizations.
- Prioritize environmental sustainability strategies in collaboration with TDC agencies as part of the master planning process.

Launch Certified Tourism Ambassador (CTA) Program to increase stakeholder engagement in community activities and events and to enhance the visitor experience

- Create proactive outreach campaign to engage Chambers, DDAs, CRAs, City, and County participation in CTA.
- Conduct outreach to community groups, NGOs, and businesses not within the tourism industry to foster growth of CTAs.
- Execute networking events, rewards, and incentives for CTAs to generate interest in initial certifications and re-certification after year one.
- Engage team members at the Palm Beach County Convention Center and area hotels in the CTA program to ensure a consistent and elevated experience for meeting attendees.
- Enhance the VIC experience by ensuring that VIC employees and volunteers are trained in the CTA program.

Community Engagement



Communicate the benefits of the Tourism Master Plan to community stakeholders and elected leaders

- Produce materials (presentations, website content, etc.) on why the plan is being created and to show progress in its development.
- Create regularly scheduled content to partners and stakeholders through CEO newsletter, LinkedIn, blogs, and other digital opportunities to keep TMP top of mind.
- Encourage partners and stakeholders to share content about the plan to residents and communities.

Align messaging with TDC agencies to streamline communication points on why local tourism promotion provides strong economic benefits for Palm Beach County

- Create unified TDC funding messaging and materials for all levels of government to help communicate why diversion away from tourism marketing and product development is detrimental to the industry.
- Develop video, infographics, and collateral which communicates how all the TDC agencies work together in tourism promotion and driving Palm Beach County's economy.
- Host collaborative events to educate community stakeholders on messaging and efforts of all the TDC agencies.

Continue proactive outreach to increase community partnerships and municipality engagement to leverage resources for the destination and organization

- Continue with community task force meetings (i.e., Community Shared Values Committee, VIC Taskforce, Convention District DOS Meeting, Flagler Business Advisory Board, etc.) to maintain alignment and knowledge of organizational impact.
- Grow the number of community partners in the areas of sustainability, wellness, diversity, and accessibility.
- Expand digital partnership offerings that provide authentic experiences which highlight the culture and history of the destination.
- Continue to collaborate with hotels, attractions, restaurants, and cities to feed content ideas for coverage across paid, owned, and earned digital footprints.
- Collaborate with the Palm Beach County Film & Television Commission on the tactics required to expand the hotel distribution footprint of The Palm Beaches TV channel.
- Expand relationships with local community groups, businesses, and organizations to collaborate and expand the reach of local events.

Continue to enhance the current organizational-wide Advocacy Plan

- Ensure Advocacy Plan is communicated at all levels of the organization to ensure timely and effective communication.
- Expand efforts to help partners in the tourism industry and community stakeholders understand the benefits of destination marketing by creating an Advocacy Guide.
- Design a digital platform to collect advocacy information from both the local and state levels to help anticipate issues and document political sentiment.
- Leverage social media, MarTech initiatives, and existing digital platforms to gather information on tourism marketing issues.
- Develop an advocacy outreach campaign around the concept of how we “Share Our Home” with visitors.
- Create content to educate advocacy audiences about how we share the best aspects of The Palm Beaches with visitors.
- Develop messaging and themes to expand on misconception that we just bring people to visit, we share our communities with visitors to help sustain our quality of place and life.



Community Engagement

Expand partnership with community-based groups for Social Inclusion initiatives with whom DTPB should be communicating and collaborating regularly

- Continue to evolve our Diversity, Equity and Inclusion “DEI” messaging towards Social Inclusion which focuses more on reducing inequalities and promoting processes and policies that enable individuals to fully participate in social and economic life.
- Support initiatives with community organizations in creating, sustaining, and retaining a viable hospitality industry workforce that can support the current and future needs of our local community.
- Create additional programming to incorporate small and minority-owned business in DTPB activities.
- Continue to support and advocate for legislation that provides funding and workforce opportunities.
- Leverage relationships with academic institutions to offer hospitality educational programming and to secure appropriate labor related research.
- Continue to work with industry leaders and stakeholders to promote sector in career days, job fairs and support internships and apprenticeships locally.

Promote the impact that Bed Taxes have in supporting local sustainability in both tourism marketing and eco renourishment

- Highlight to stakeholders DTPB marketing efforts focused on sustainability and eco awareness.
- Present to local stakeholders how bed tax dollars are being used to protect and restore local natural resources.



Business Intelligence, Research and Destination Development

Business Intelligence and Research provides the data infrastructure, analytics, visualization, and reporting for DTPB, partners and stakeholders to leverage insights and trends derived from core research strategies and initiatives deployed by DTPB. The goal is to improve decision making, increase efficiency and maximize return on investment.

Destination development refers to the strategic planning and management of a tourist destination to enhance its attractiveness, sustainability, overall visitor experience and resident quality of place. This involves a coordinated approach that includes infrastructure development, marketing, community engagement, and environmental stewardship.

Lead: SVP – Business Intelligence, Strategy & Destination Development

In collaboration with Executive Staff and Community Stakeholders



Business Intelligence & Research

Monitor macro-level economic & geopolitical conditions that may adversely affect travel and develop contingency plans to minimize any negative impact

- Examine reports from Future Partners and Longwoods to monitor monthly changes in traveler sentiment.
- Leverage partnership with Visit Florida to understand current travel trends to the state and regions.
- Dive deeper into The Palm Beaches prospective traveler trends through MMGY Portrait of the American Traveler (POAT).
- Utilize in-house research capabilities to track key trends within core target markets.
- Determine and deploy any ad/hoc research necessary to better understand trends that may impact The Palm Beaches and strategies to improve destination performance.

Continue to leverage and enhance the capabilities of Destination Demand™ to identify need periods, underlying trends affecting performance and recommend actions

- Increase collaboration with TDC agencies in the Destination Demand™ process.
- Amplify community outreach of immediate trends.
- Develop ways to understand feeder market and segmentation trends within Destination Demand™.
- Within MarTech stack, design attribution models to establish direct correlation of specific tactics.

Develop campaign-wide ROI and attribution metrics to assess effectiveness of targeted segments and performance by lodging category

- Assess performance of each pillar targeted by the Collection campaign.
- Determine DTPB impact on various lodging categories.

Business Intelligence & Research

Help ensure successful and comprehensive Tourism Master Plan

- Assist TDC in the execution of master planning process.
- Provide all data and research resources necessary for Tourism Master Plan process.
- Help facilitate primary research needs through coordination of interviews and surveys.

Build MarTech data foundation and strategy layers

- Migrate all research data into data foundation layer.
- Connect integrations for future data into the foundation layer.
- Develop formulas and algorithms for analysis of data foundation.
- Build reporting and dashboards for dissemination of key trends and statistics.

Enhance Resident Sentiment study to better understand nuances of PBC households' impressions of tourism by key demographics

- Leverage Tourism Master Plan process to enhance and refine current tracking of resident and community sentiment towards tourism.
- Develop communication strategy of key findings to help support local agencies and municipalities.

Generate enhanced communication tools to communicate key tourism messages catered to targeted audiences

- Understand core issues related to tourism to develop the optimal messaging.
- Monitor public sector, governmental proceedings, and statements by public officials to assess sentiment towards issues relevant to tourism.



Destination Development

Leverage Master Plan process to better align and advocate tourism development

- Create alignment of city & county visions with potential tourism product development.
- Identify key development opportunities.
- Strengthen relationships within key municipalities and developers to facilitate new developments.

Continue to advocate for future Convention Center District development

- Assist PBC in the development of the 2nd HQ hotel.
- Assess the current environment for future development needs such as expansion of convention center.



Tourism Trends & Performance in The Palm Beaches

This following section first highlights key macro-economic trends and travel industry trends, then focuses on The Palm Beaches' recent performance and outlook, including an analysis of core segments.

Macro-Economic Trends

Cost of Travel:

Inflation and prices have stabilized, travel prices have come down with the cost of airfare and travel decreasing. Food and beverage prices continue to increase which has affected consumer behavior. Recreation prices have increased significantly with travelers still prioritizing these activities. With the cost of travel declining and prices overall stabilizing, this bodes well for the affordability of travel.

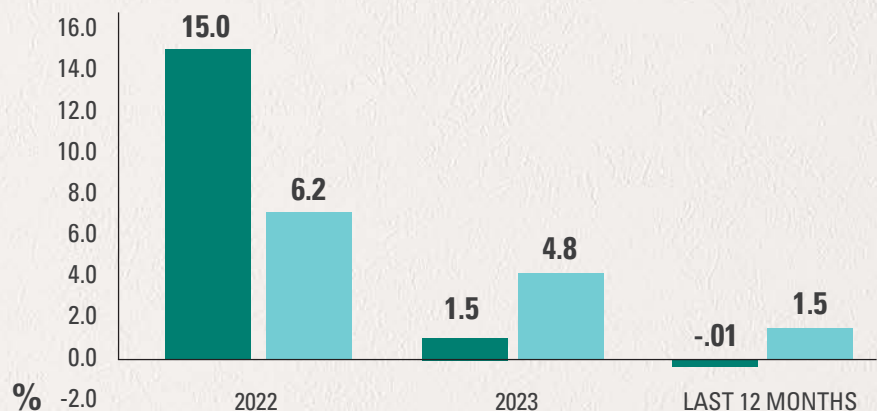
Traveler Sentiment:

These dynamics illustrate a complex but generally positive outlook for the travel and tourism sector in 2025. While some costs, such as food and beverage prices, continue to rise, the overall affordability of travel is enhanced by declining transportation costs and stable inflation. This environment is likely to encourage more people to travel, spend on experiences, and explore new destinations, contributing to the industry's growth and resilience.

Annual Change In Travel Prices Compared To CPI



Source: CPI average consumer price index score for 12-month period from US Bureau of Labor Statistics, TPI DTPB estimate based on U.S. Bureau of Labor Statistics

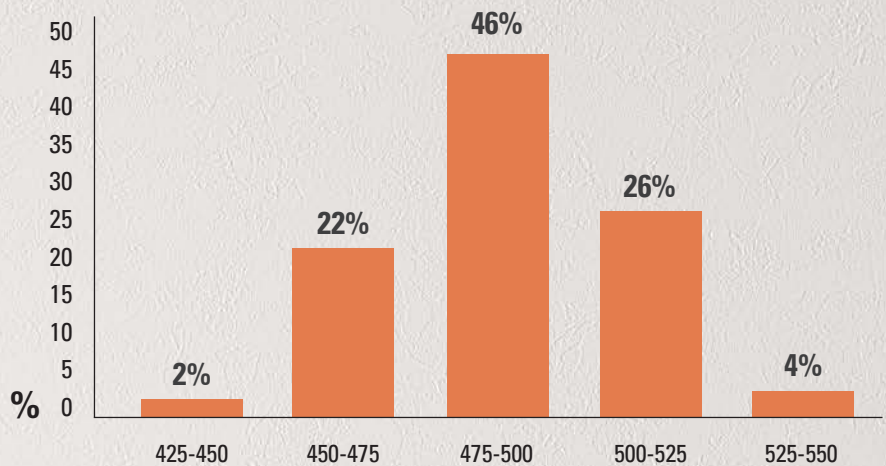


Federal Interest Rates:

The federal funds rates have remained at the same level 5.25% to 5.50% for the first half of 2024. According to CME’s Fed Watch Tool, there is a 58% probability of rates lowering by a quarter of a point (25 basis points) in September and a 42% chance of being cut by 50 basis points (a half a point) by December. Lower rates going into 2025 means that the cost of capital for business and government investment will become cheaper. This will ease the ability for infrastructure and tourism related projects to be completed. Additionally, consumers will have better financial conditions and more disposable income to use on services like travel.

Target Rate
Probabilities for
Dec. 18 FED
Meeting

A TARGET RATE IS 525-550
Source: CME Group FedWatch
Tool – July 2024



2024 Election:

The 2025 fiscal year began ahead of the 2024 election. Historically, it is tough to see any correlation to election years and performance in tourism to The Palm Beaches. Any elections with negative performance were due to larger economic issues (September 11th, Great Financial Crisis and COVID-19). Regardless of its minimal overall impact, increased politicalization of issues may cause some changes in consumer behavior that can affect the performance of a destination that needs to be understood. There is a possibility that future government policies can impact travel, including changes to visa requirements, spending on infrastructure projects and travel-related tariffs.

Tourism Trends and Performance in The Palm Beaches

Geopolitical Risks:

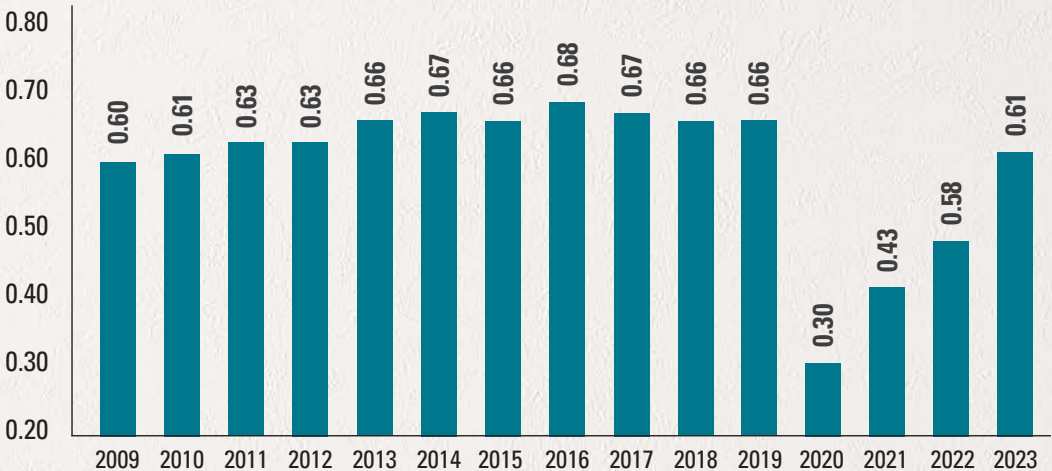
Greater geopolitical risks exist such as Russia/Ukraine, Middle East, China/Asia, add a potential risk to outlook. Political stability and a safe environment are critical for tourism. Political unrest, terrorism, and conflicts can deter tourists and lead to travel advisories, negatively impacting tourism.

Labor Shortages:

Employment in the Leisure & Hospitality industry has recently surpassed pre-pandemic levels with the same number of jobs at accommodations as in 2019. However, the number of businesses is significantly higher which means the labor challenges continue. The number of jobs per hotel rooms in The Palm Beaches is still 9% lower than the long-run average from 2013-2019.

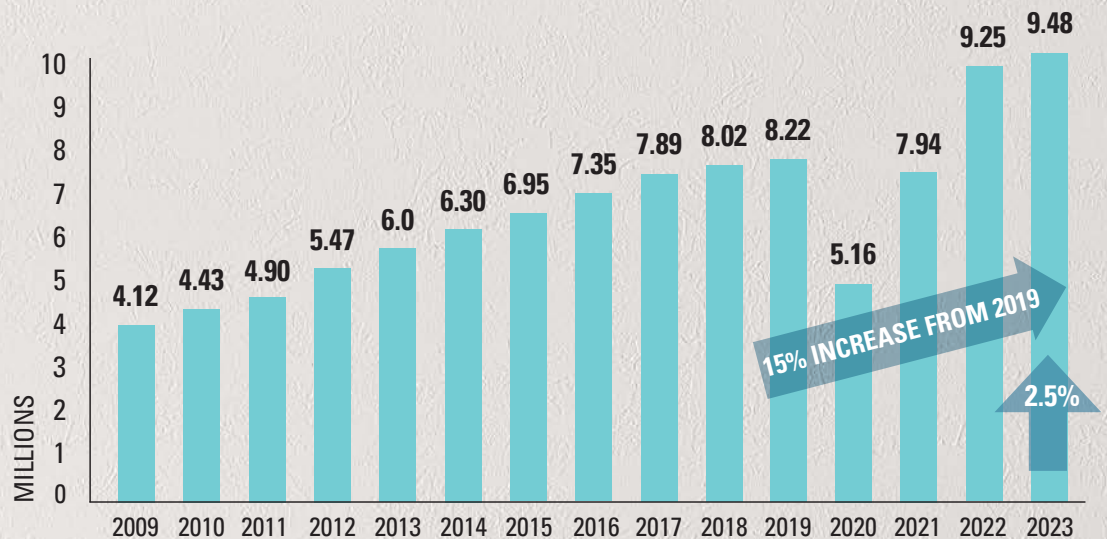
Number of Jobs Per Room in The Palm Beaches

Source: STR and Florida Department of Economic Opportunity



The Palm Beaches' Performance and Travel Trends

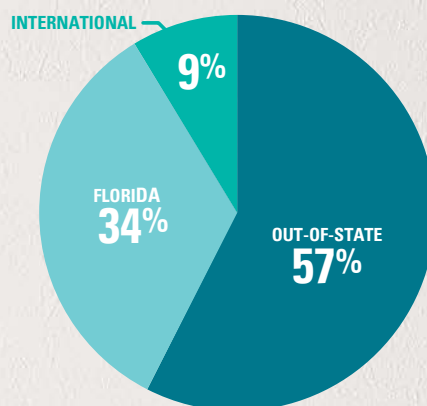
Visitation



Source: DTPB estimates extrapolated from aggregate card usage data provided by VisaVue® Travel and data from independent research sources such as Florida Department of Revenue, STR, AirDNA, Euromonitor, Tourism Economics and other primary research sources. Data sources, methodology and analysis are confidential and exempt from disclosure under the public records law, unless judicially determined otherwise. Such information includes business records which, if released, would reveal the identity of persons or entities who provide data or other information; trade secrets as defined by Sec. 812.081, Fla. Stat.; and/or trade secrets and commercial or financial information gathered from a person and privileged or confidential under federal law.

Visitation increased by 2.5% in 2023 to a record 9.5 Million visitors. This is a 15% increase over 2019. 57% of visitors came from out-of-state, 34% from Florida and 9% from international markets. Domestic visitation grew by 1.3% (from 2022 to 2023) indicating a leveling off in demand while international markets grew by 15%. Even though international makes up 9% of total visitation, the overall volume in growth from international outpaced out-of-state domestic.

2023 Visitation by World Region



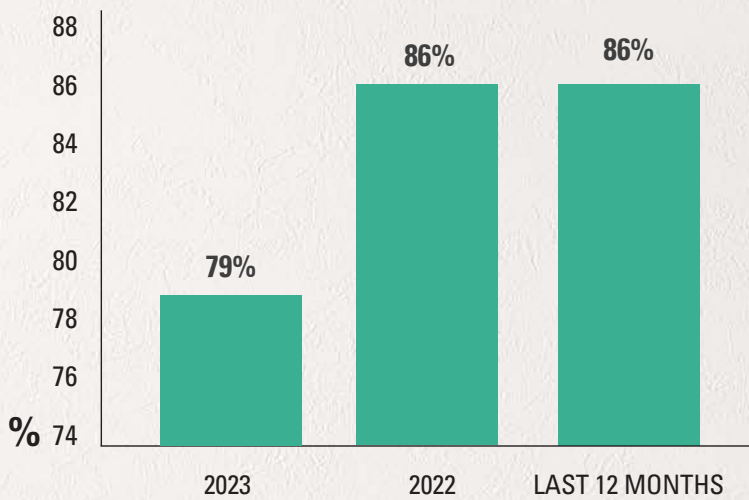
Source: DTPB estimates extrapolated from aggregate card usage data provided by VisaVue® Travel and data from independent research sources such as Florida Department of Revenue, STR, AirDNA, Euromonitor, Tourism Economics and other primary research sources. Data sources, methodology and analysis are confidential and exempt from disclosure under the public records law, unless judicially determined otherwise. Such information includes business records which, if released, would reveal the identity of persons or entities who provide data or other information; trade secrets as defined by Sec. 812.081, Fla. Stat.; and/or trade secrets and commercial or financial information gathered from a person and privileged or confidential under federal law.

Travel Sentiment

Traveler sentiment continues to be elevated with little growth over 2023. As also seen by visitation numbers, demand for travel among domestic travelers has leveled off.

Excitement to Travel Among All US Travelers

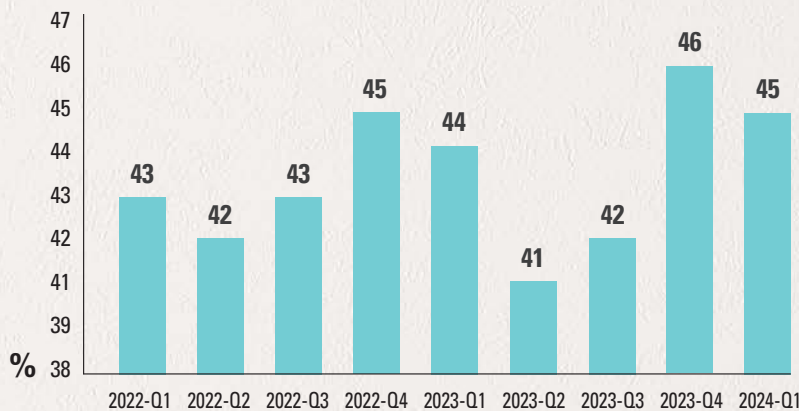
Source: Future Partners



Interest in The Palm Beaches shows the same trend with 2024 levels near 2023, but higher than 2022. Leading indicators measured by DTPB show steady demand from core domestic feeder markets. This steady growth means that a focus on yield over volume from core markets is the key formula for success.

Interested in Visiting The Palm Beaches

Source: MMGY Portrait of The American Traveler

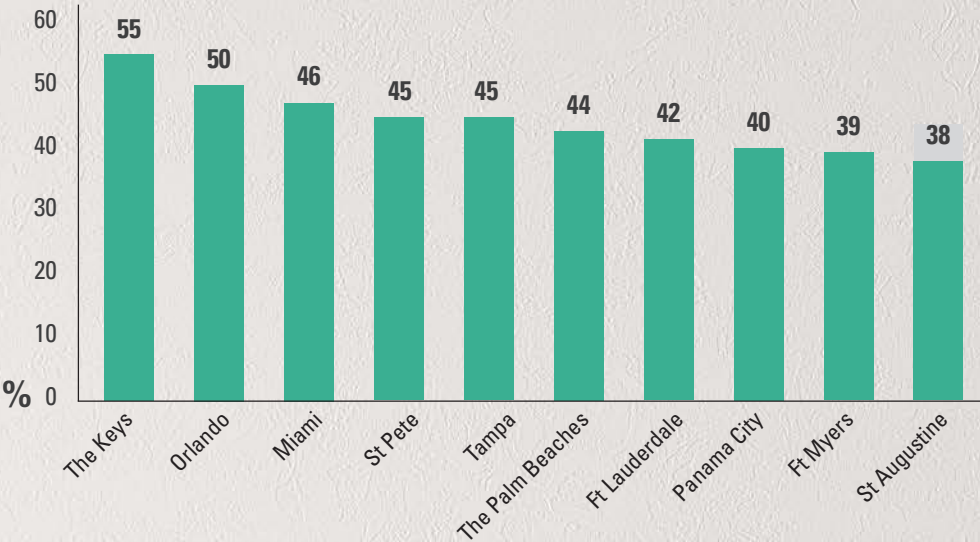


In-bound international travel to The Palm Beaches continues to show strong increases. The mix of international visits in our destination is about 8-10% annually. Nationally, outbound international travel continues to grow and take share from domestic travel. Over the first quarter of 2024, visitation from domestic markets was flat while international visits grew 10.3%. Tracking studies conducted by DTPB indicate continued strength and growth from international markets.

When looking at Interest in Visiting Key Destinations in Florida, The Palm Beaches rank within the 2nd tier of destinations (outside The Keys and Orlando) among Miami. This indicates that The Palm Beaches is a destination that commands a premium, which is reflected in the performance of average daily hotel rates.

Interested in Visiting Florida Destinations

Source: MMGY

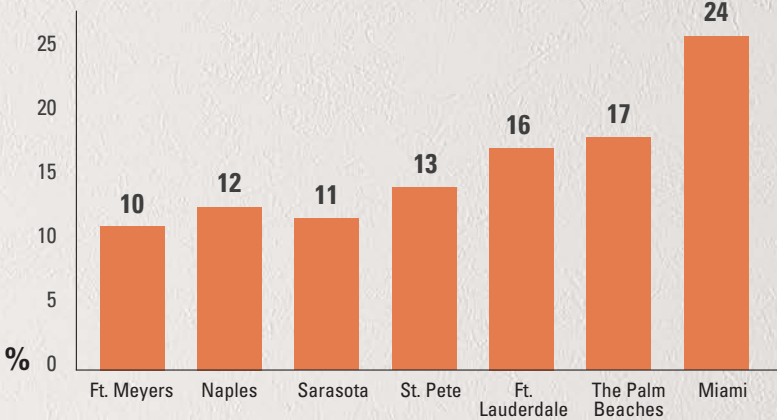


When it comes to Likelihood to Visit, a metric more telling on behavior, The Palm Beaches rank 2nd to Miami among its leisure peers. These levels are on-par with 2023 findings, reinforcing the leveling-off in demand in 2024.

Likelihood of Visit

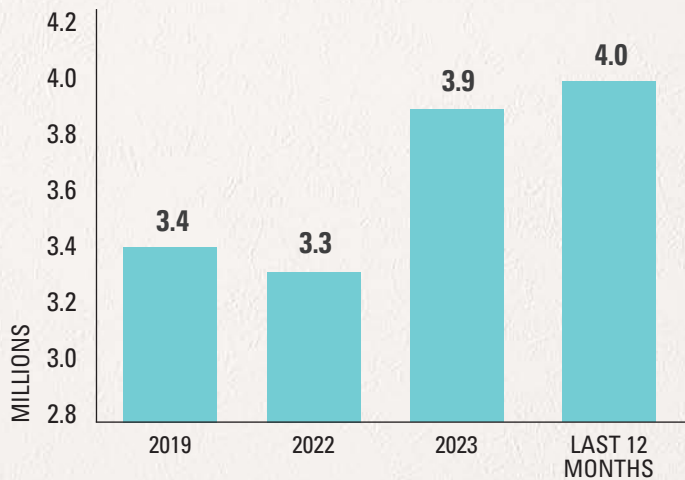
NEXT 12 MONTHS | AMONG DTPB TARGET MARKETS

Source: DTPB Brand Tracker



Airlift continues to increase with South Florida at record levels of seat capacity and inbound passengers. Palm Beach International Airport (PBI) has seen a record 4 Million arrivals over the last 12 months.

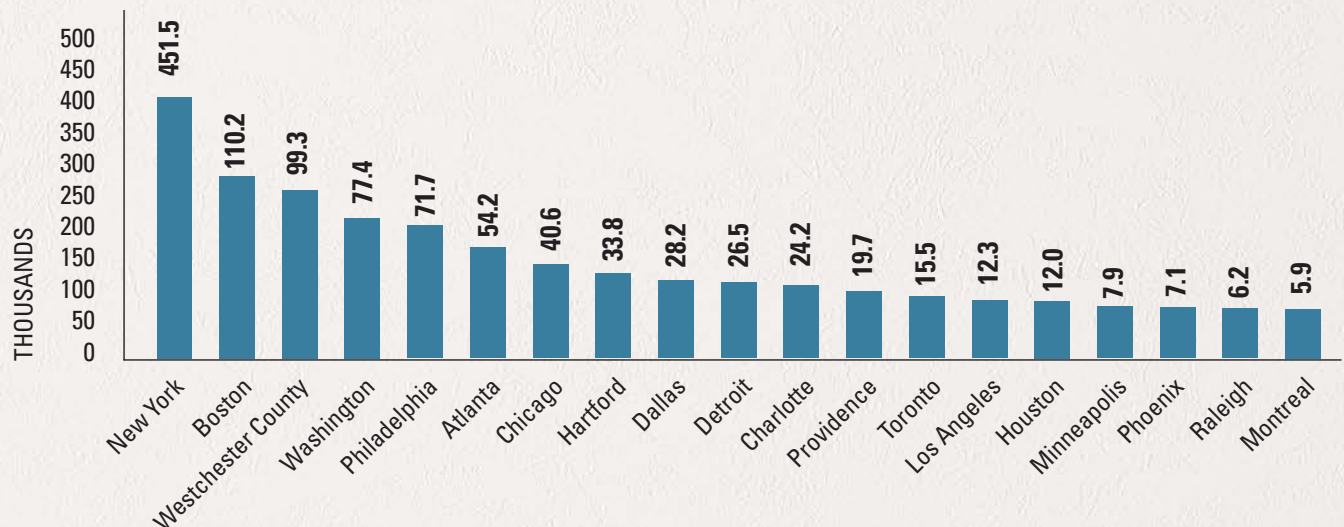
PBI Arrivals



Source: PBI

Among arrivals not originating at PBI, 97% are domestic. New York is by far the top origin market for PBI with over 450,000 arrivals. This is less than half of New Yorkers that visit. More than 60% of visitors that fly use Ft. Lauderdale International Airport as their primary airport. Visitors that order an Official Visitors Guide or engage with DTPB marketing are 2x more likely to use PBI.

2023 PBI Arrival Origin Markets (Top 20)



Source: ARC Forward Keys

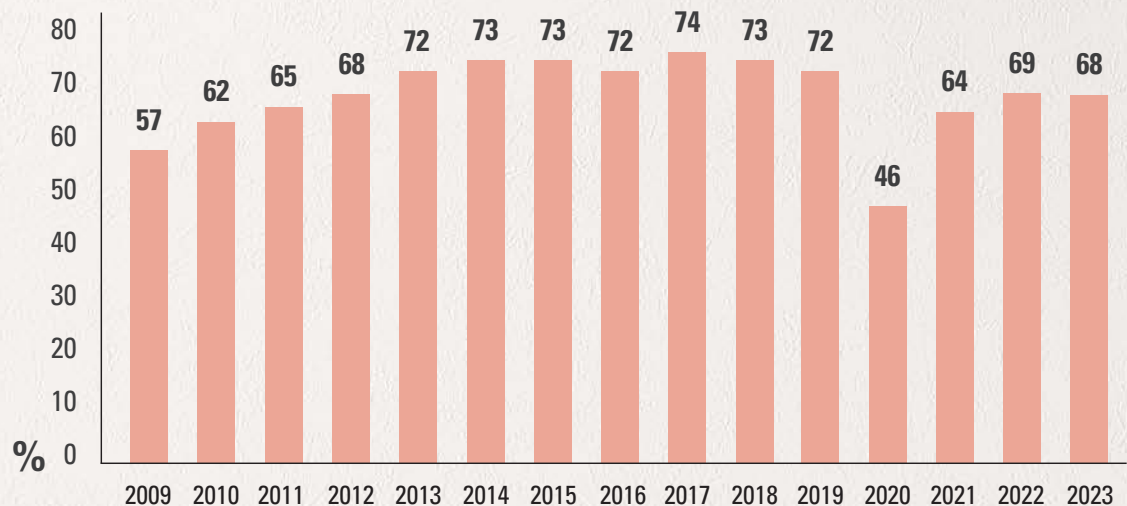


Hotel Performance, Chain Scale Performance and Alternative Lodging Trends

Hotel occupancy has remained in the upper 60% range over the last few years, ending 2023 at 68%. Pre-pandemic levels were in the low 70% range. The major factor contributing to this is hotel room supply. Since 2019 the number of rooms has grown 8%. Total hotel room nights sold has grown 5.4% since 2019 and close to 1% from 2022, ending 2023 at 4.72 Million room nights sold.

Hotel Occupancy

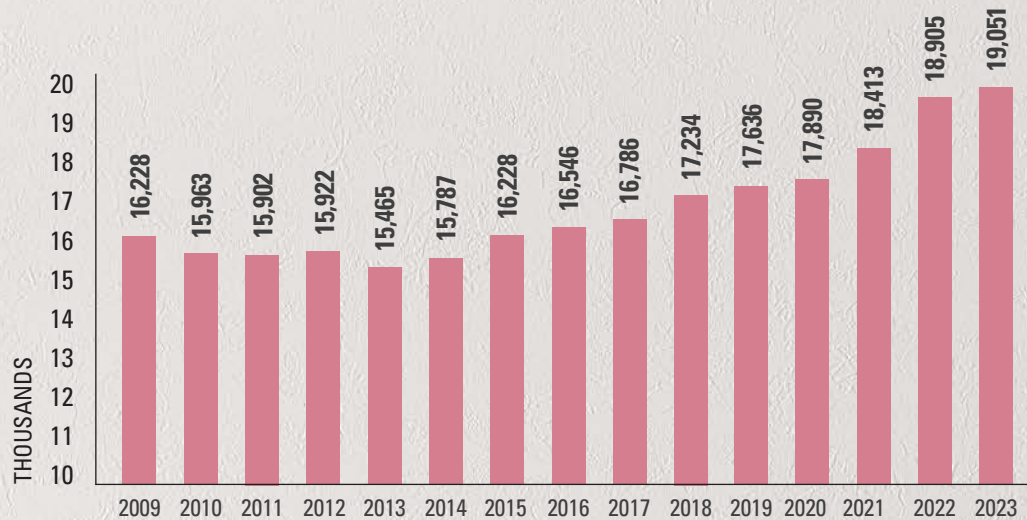
Source: STR, Inc.
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Room supply growth has slowed since 2020. There have been nearly 40 projects proposed and planned over the last few years, 17 of these have been abandoned. There are currently 3 properties under construction with an additional 14 in various planning stages. As demand has leveled off, this slowdown in construction ensures a healthy absorption of new rooms into the market.

Hotel Room Supply

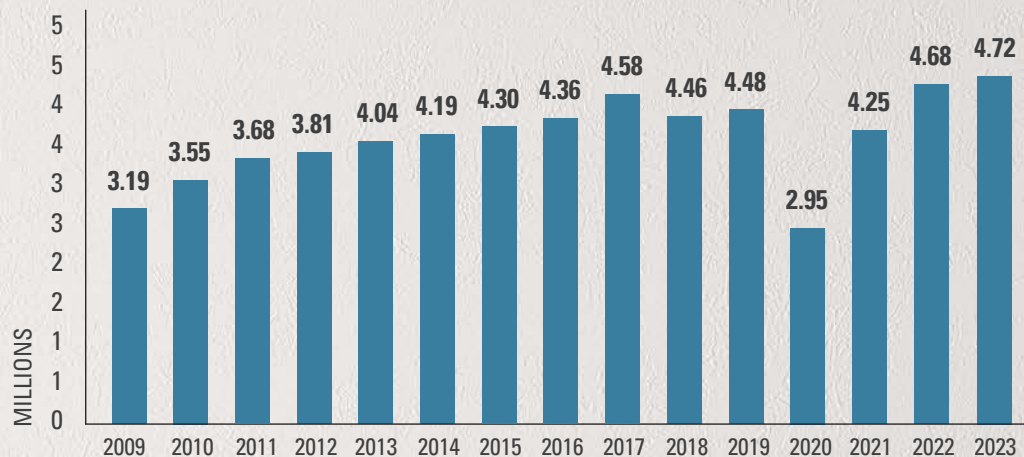
Source: DTPB, STR and Florida Department of Professional Regulation



Hotel Room Nights Sold rebounded significantly from 2020 to 2022. In 2023, room night growth was just under 1% as travel demand has leveled off to moderate growth rates with increased global competition in 2023 and 2024.

Hotel Room Nights Sold

Source: STR, Inc. Reproduction or other re-use of this data without the express written permission of STR is strictly prohibited.



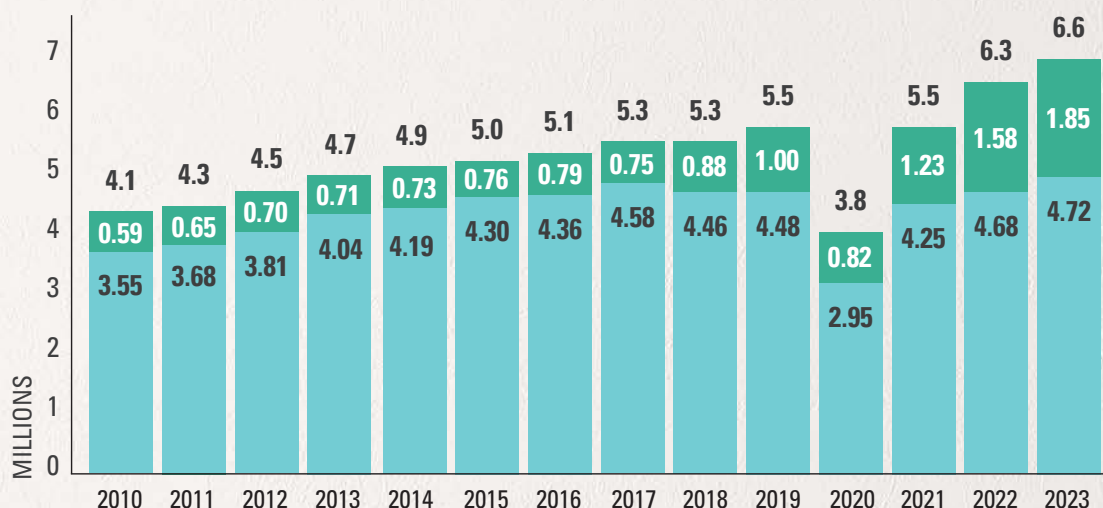
Alternative lodging (vacation rentals, Airbnb, VRBO, etc.) over the past 3 years has grown significantly and continues to outpace hotels, recently taking market share from limit-service hotel segments. In 2023, 1.85 Million room nights were sold among alternative accommodations, 85% more than 2019 and 17% more than 2022. Among all paid lodging 6.6 Million room nights were sold in 2023, 4.7% more than 2022. This dynamic has continued in 2024 with no signs of slowing.

Hotel Performance, Chain Scale Performance and Alternative Lodging Trends

Total Paid Room Nights

- Hotel Room Nights
- Vacation Rental /Shared Lodging Room Nights

Source: Hotel Performance STR, Inc. & Shared Lodging AirDNA

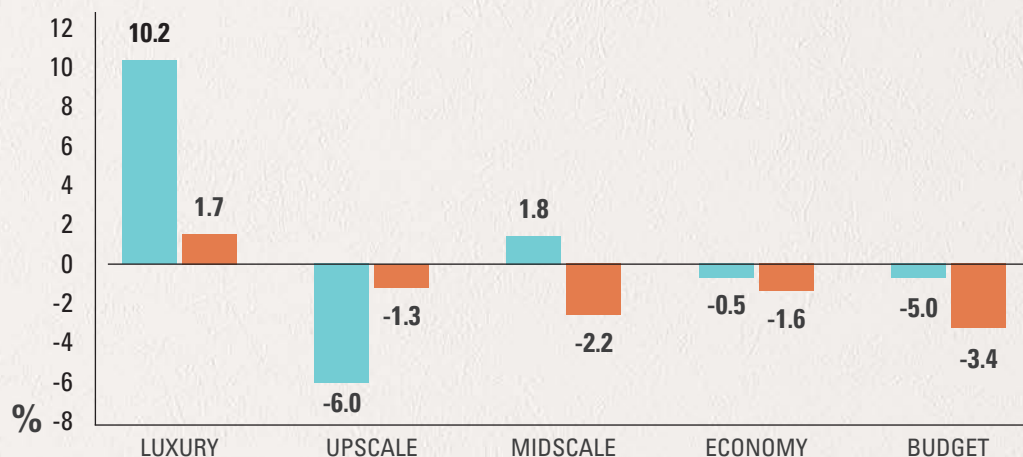


Hotel performance has differed significantly based on the various scales. As seen from the growth in alternative lodging performance, market share has been taken from some limited-service hotels. Economic trends have driven much of this change in consumer behavior, not only on alternative lodging options but trading up and down the various price levels to cause a lot of competition between brands. Strategies focused on maintaining rates and driving demand have worked well for The Palm Beaches. Other destinations are lowering rates to steal market share. Miami cut hotel rates by 5.2% to grow 0.3% more room night demand. Ft. Lauderdale held hotel rates and demand while The Palm Beaches grew hotel rates with flat demand. This proves the revenue optimization strategy is most effective at producing revenue growth rather than searching for volume.

Change in Demand by Hotel Scale

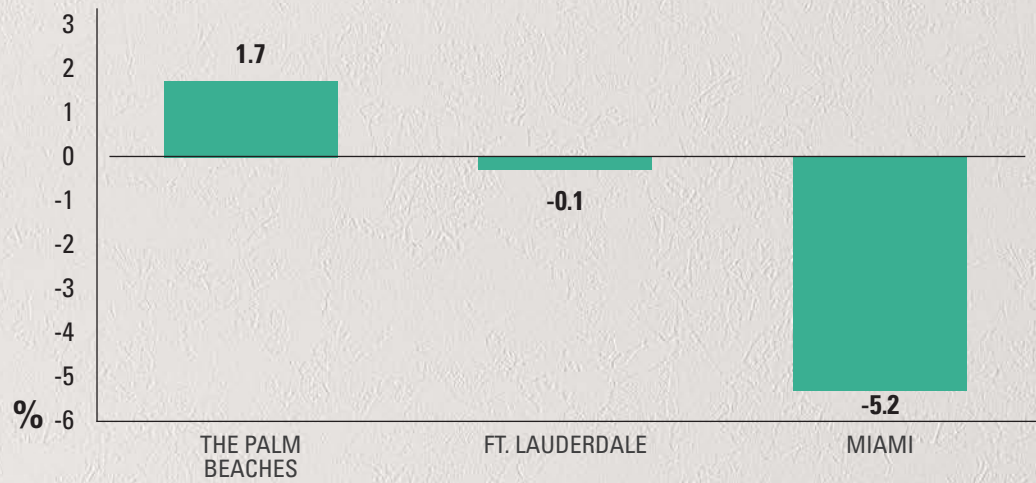
- 2023
- Jan-May 2024

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Change in ADR (2023)

Source: STR, Inc.
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Feeder Market Performance

DTPB's core domestic targets plus Canada round out the top 8 markets. Domestic markets are New York, Boston, Chicago, Washington D.C., Philadelphia, Miami, Tampa and Orlando. In terms of volume, top markets range from 90,000 to 1.1 Million. There are 3 tiers of markets by volume (500k+, 200k-500k and 90k-200k). These account for two-thirds of visitors.

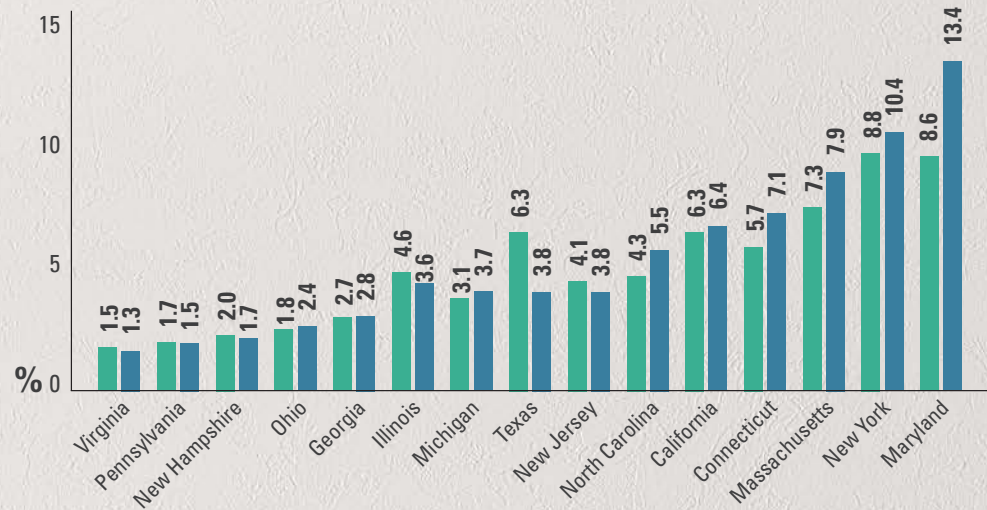
The Palm Beaches have strong share of domestic visitation from key targets such as New York City, Baltimore, and Boston. Economic conditions have been steady in these Northeast core markets. Population growth expectations are moderate. Protecting share is key. Significant market opportunities exist with Texas markets Dallas and Houston. Economic conditions have been strong in recent years and population growth has been outpacing U.S. averages. Dallas and Houston have grown 17% in recent years.

Market	Visitation	Rank
New York	1.1 M	1
Miami	926k	2
Orlando	613k	3
Tampa	360k	4
Canada	358k	5
Wash. D.C.	358k	6
Port St. Lucie	331k	7
Boston	264k	8
Atlanta	254k	9
Philadelphia	214k	10
Jacksonville	182k	11
Los Angeles	178k	12
Chicago	176k	13
Ft. Myers	171k	14
Detroit	138k	15
Sarasota	119k	16
Melbourne	104k	17
Dallas	95k	18
Houston	88k	19

Palm Beaches Share of Florida Visitation

Source: DTPB and
Visit Florida

2019 2023



For international markets, more considerations are given including overall value, time of trip, Florida visitation, market share, availability of flights and hedging against domestic market conditions. Over the last few years, international visitation has grown significantly and surpassed 2019 levels. This is despite the current strength of the US dollar creating unfavorable exchange rates. If the U.S. economy declines, the dollar will weaken, creating more demand for inbound international visitation as the exchange rates cause a relative discount.

Country	2021	2022	2023	%Chg
Canada	115,600	308,300	358,200	16.2%
Brazil	5,800	20,900	36,700	75.6%
United Kingdom	15,600	36,400	37,000	1.6%
Colombia	28,200	21,200	20,800	-1.9%
Germany	3,300	18,100	21,200	17.1%
Mexico	10,700	12,900	15,200	17.8%
Total	179,200	417,800	489,100	17.1%

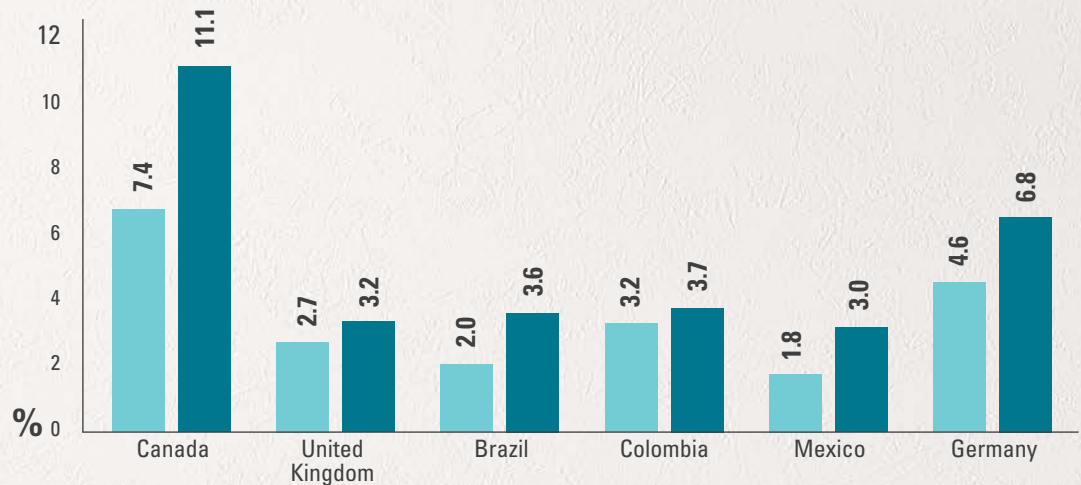
Feeder Market Performance

The Palm Beaches' share of Florida visitation is also at record highs. A mature market for The Palm Beaches is around 10% of Florida visits (New York and Toronto are at these levels). There is enormous potential to capture that share to propel some of these markets into the top 20 feeder markets.

Palm Beaches Share of Florida Visitation

2019 2023

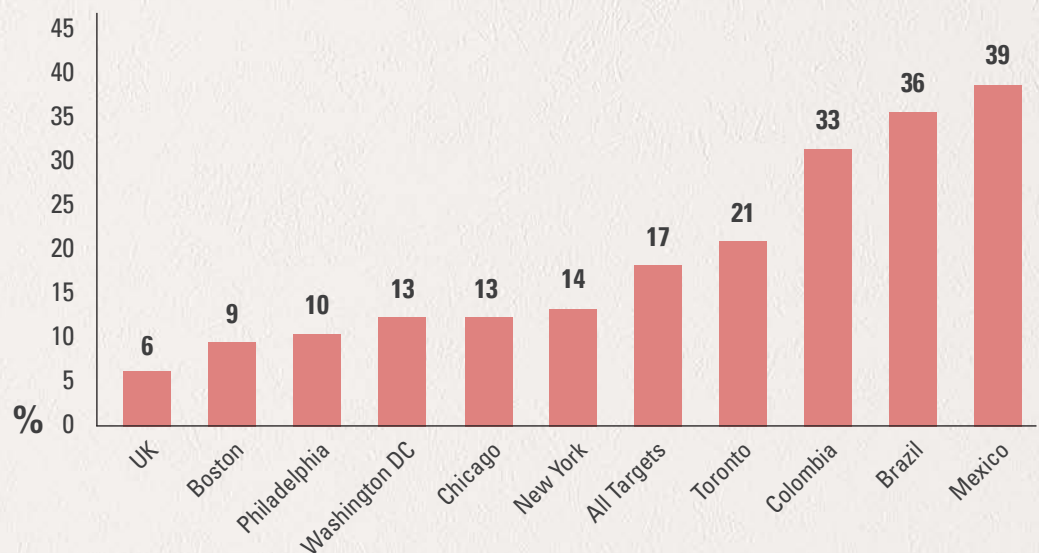
Source: DTPB and Visit Florida



Research conducted by DTPB shows the strength of international markets compared to domestic markets in terms of intent to visit. With longer planning windows, this could mean that international targets have already planned travel to The Palm Beaches laying a solid foundation of business. Domestic markets can be more volatile but do indicate stable travel intentions. DTPB ensures peak performance by monitoring overall demand to respond to real-time market conditions that may disrupt performance.

Likelihood to Visit The Palm Beaches in Next 12 Months by Segment (Top Box)

Source: DTPB Brand Tracker



Top Performing Markets



FAMILY	
Colombia	59%
Brazil	51%
Mexico	46%
Chicago	41%
Orlando	37%
Canada	36%
Philadelphia	34%
Miami	32%
NYC	28%
Boston	28%
Washington, D.C.	28%
United Kingdom	22%



ARTS & CULTURE	
Colombia	53%
Brazil	52%
Miami	47%
Mexico	43%
Boston	42%
Chicago	37%
United Kingdom	37%
NYC	37%
Canada	36%
Philadelphia	36%
Washington, D.C.	31%
Orlando	29%



BEACHES & OUTDOORS	
Colombia	72%
Canada	63%
Boston	62%
Philadelphia	61%
Brazil	59%
Mexico	57%
United Kingdom	57%
NYC	55%
Orlando	55%
Washington, D.C.	55%
Chicago	53%
Miami	48%



SPA & WELLNESS	
Brazil	22%
Colombia	18%
Mexico	13%
Orlando	11%
Canada	9%
United Kingdom	8%
NYC	7%
Philadelphia	7%
Chicago	5%
Boston	4%
Washington, D.C.	2%
Miami	1%



SHOPPING	
Brazil	79%
Colombia	69%
Mexico	63%
Canada	56%
Chicago	53%
United Kingdom	51%
Philadelphia	51%
Miami	51%
Orlando	48%
NYC	47%
Boston	45%
Washington, D.C.	43%



CULINARY	
Brazil	35%
Colombia	32%
Mexico	30%
NYC	20%
Miami	19%
Philadelphia	17%
Canada	16%
United Kingdom	15%
Boston	14%
Orlando	13%
Chicago	13%
Washington, D.C.	11%



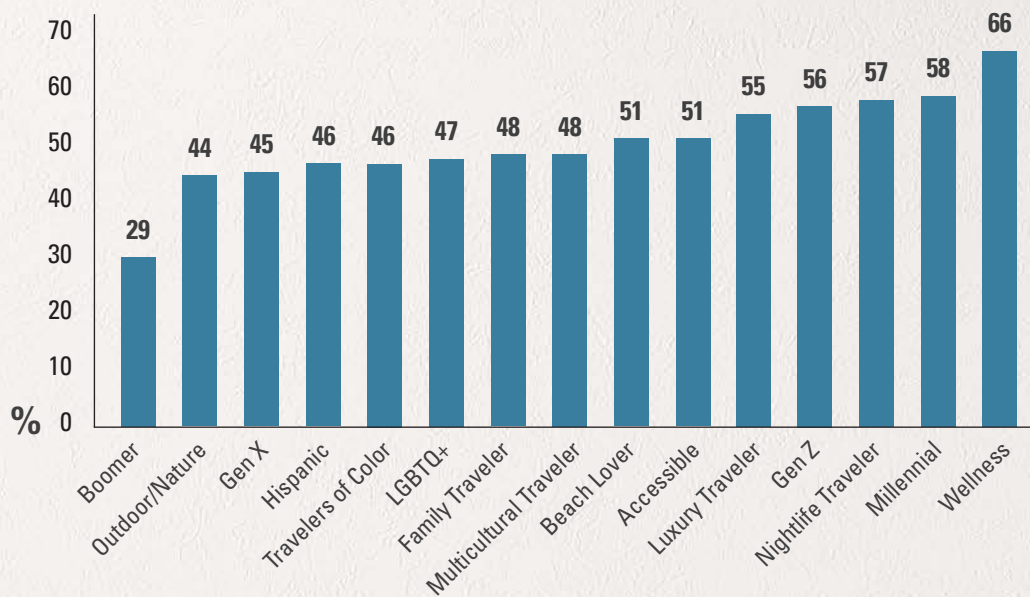
SPORTS & GOLF	
Colombia	51%
Canada	33%
Philadelphia	32%
Brazil	32%
Chicago	31%
Mexico	31%
Miami	29%
Orlando	29%
NYC	29%
Boston	29%
Washington, D.C.	27%
United Kingdom	21%

Segmentation

Current target segments are based on demographics such as age, lifestyle, and travel motivations. The Palm Beaches perform extremely well in generating interest among younger demographics and those interested in wellness, nightlife, luxury and beaches. In terms of Travel Intent, a gauge of marketing performance, diverse groups have ranked positively with interest in visiting the destination.

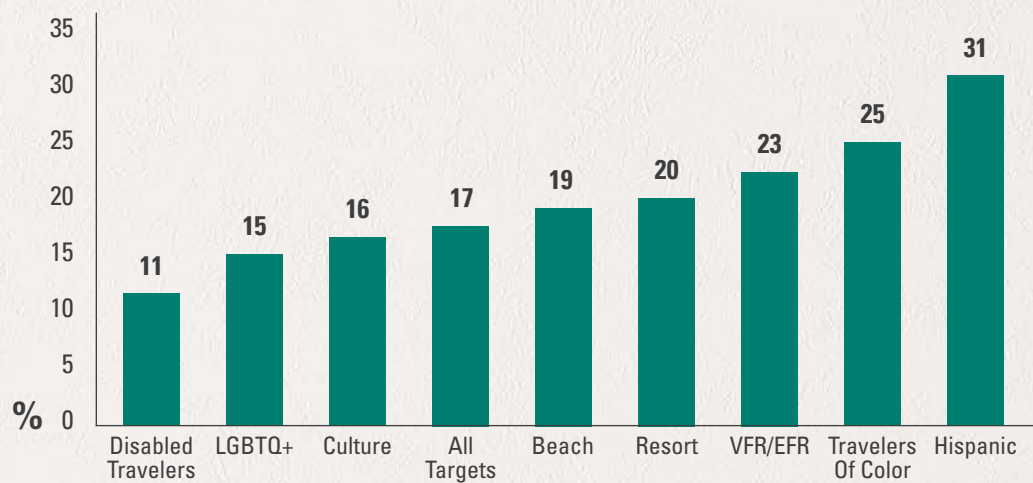
Interested in Visiting The Palm Beaches

Source: MMGY
Portrait of The
American Traveler



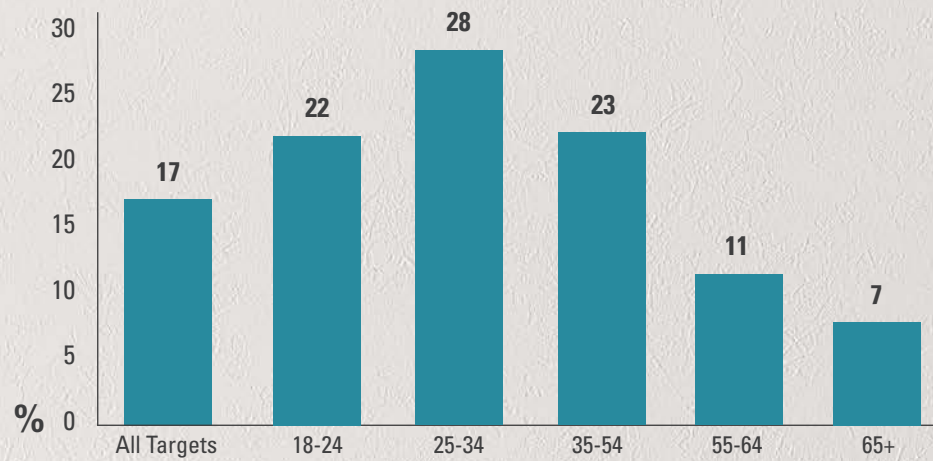
Likelihood to Visit The Palm Beaches in Next 12 Months by Segment (Top Box)

Source: DTPB Brand Tracker



Likelihood to Visit The Palm Beaches in Next 12 Months by Segment (Top Box)

Source: DTPB Brand Tracker



Campaign Performance

The Palm Beaches Collection campaign, launched in mid-2024, focuses on 7 distinct pillars identified through years of segmentation research. Messaging has been created to address each of these segments. As described earlier, different feeder markets skew more towards some of brand pillars and destination attributes than others. The Palm Beaches brand resonates the most with Spa & Wellness and Culinary, while Beaches and Family are top motivators. As the campaign matures, the goal is to improve performance among each segment, which would then optimize performance across all lodging scales and times of year.

Measure	Family	Art & Culture	Beaches & Outdoor	Spa & Wellness	Culinary	Shopping	Sports & Golf
Desirability	33%	27%	30%	57%	42%	32%	33%
Visit Past Year	11%	9%	8%	17%	10%	11%	13%
Visit Next 12 Months	24%	16%	19%	37%	26%	23%	22%
Relevance to needs/ expectations	18%	12%	15%	36%	23%	18%	18%
Av. Length of Stay in TPB	2.7	2.52	2.74	3.8	2.5	2.56	2.68

Groups, Meetings, Events and Business Travel

Forecasts for national group performance have declined to approximately 92% of 2019 levels, down from a previous estimate of 94%.

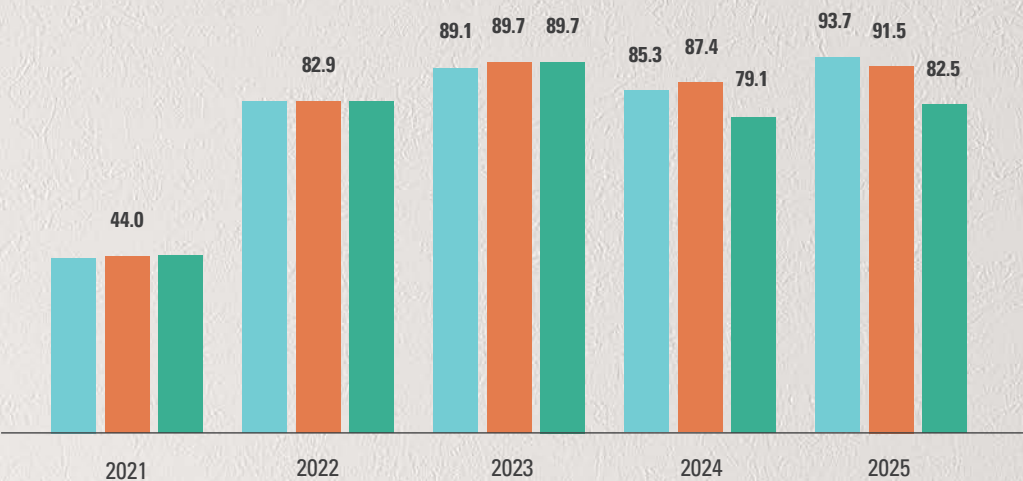
In contrast, The Palm Beaches and Florida have already surpassed 2019 levels in 2023. The first half of 2024 experienced a downturn in total group room nights, but the second half saw significant growth. Overall, the 2024 calendar year is expected to outperform 2023. Looking ahead, 2025 is pacing significantly higher than both 2024 and 2023, with only July and August showing softer performance to date.

Group Demand Benchmark: U.S. Aggregate

INDEX (2019=100)

January 2024
Current Forecast
Downside

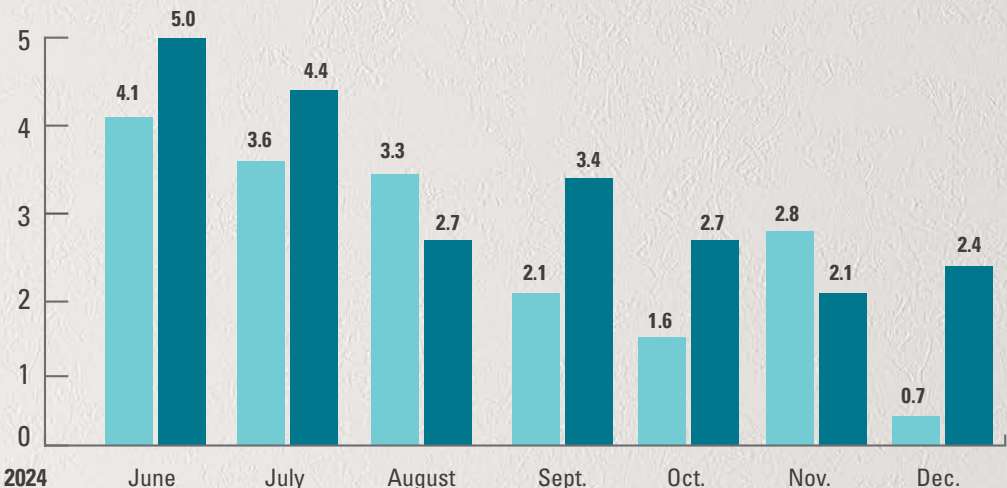
Source: 2Synergize Future Pace;
Tourism Economics



Group Room Night Demand

Group Room Nights (RNs)
On The Books (OTB) as
percent occupancy

LY Group Occupancy
Group Occupancy



A key trend affecting group business is shorter booking windows. Significantly more groups are booking within the year for the year. This is driving more dynamic pricing strategies among hotels which traditionally relied on stable long-term projects with the stability of group commitments 1+ years out.



CITY OF DELRAY BEACH

CITY OF
DELRAY BEACH
YellowTennisBall.com

PAETEC

PAETEC



South West 7-1
Division Family
Men & Girls 12-18
Sponsor - 100

SOUTH WEST
BOX

SOUTH WEST
SECTION DUA
←

SOUTH
SECTION BOX

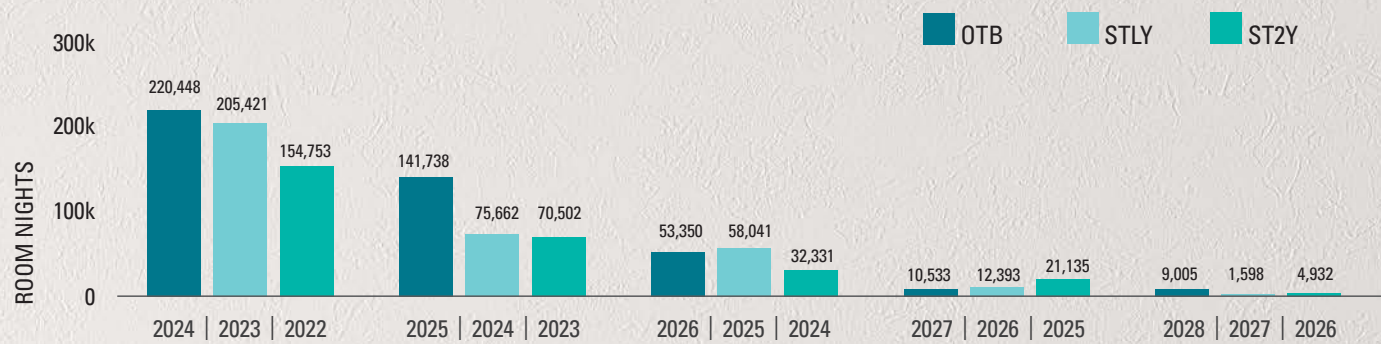
South 2B-2C

SOUTH B
SEATS 25

Groups, Meetings, Events and Business Travel

This is also evident in the 2026 and 2027 booking pace which currently is behind pace for same time in previous years. The FIFA World Cup in 2026 could affect June and July bookings in the year.

Room Nights: OTB Vs STLY

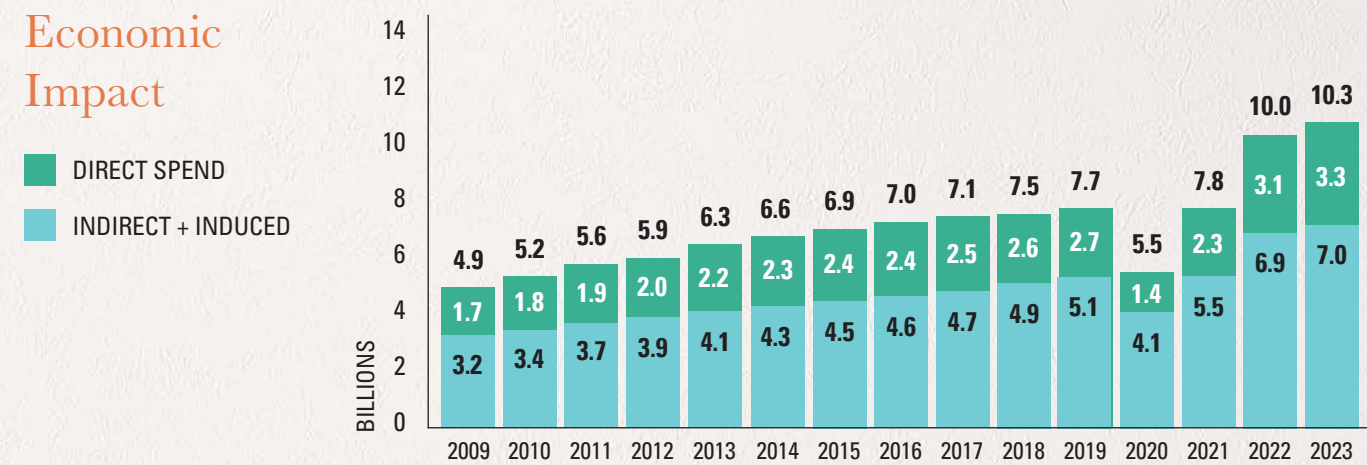


Additionally, planners are looking for enhanced experiences, from higher levels of service to more connection to the local culture. These also include a focus on sustainable practices and wellness related offerings.



Economic Impact and ROI

The tourism industry generates over \$10 Billion in economic impact, supporting 85,000 jobs in The Palm Beaches. Spending has leveled off in the last few years. Visitors spent \$7 Billion directly during their trips in both 2022 and 2023. Current economic conditions, such as inflation, have caused consumers and travelers to be more conscious of their spending. As such, travel budgets have remained the same even though travel intentions have increased. This is because trends of substitution and scaling back on certain experiences, such as fine dining and shopping, have emerged as ways to continue to travel with stagnant travel budgets.



Source: DTPB estimates extrapolated from aggregate card usage data provided by VisaVue® Travel and data from other independent research sources such as Florida Department of Revenue, STR, Euromonitor, TNS, Tourism Economics

During 2023, DTPB marketing and sales efforts accounted for 2 Million hotel room nights. This is 42% of all hotel rooms sold during the year. These room nights generated \$31 Million in bed taxes.

For every 1 dollar spent by DTPB, \$1.60 was generated in bed taxes. Destination marketing is a long-term strategy. For every visit generated within the year, at least 2x more visits are generated within the next year.

Supporting Our Community and Tourism Industry



If tourism promotion ended in Palm Beach County, 20% less visitors and 42% less hotel room nights would be sold over the course of a few years. More than one-third of bed taxes would vanish. Colorado did this in the 1990s and it took over a decade to recover. DTPB drives this economic engine totaling \$2.1 billion. Without this engine, the local economy would shrink by nearly 5%.



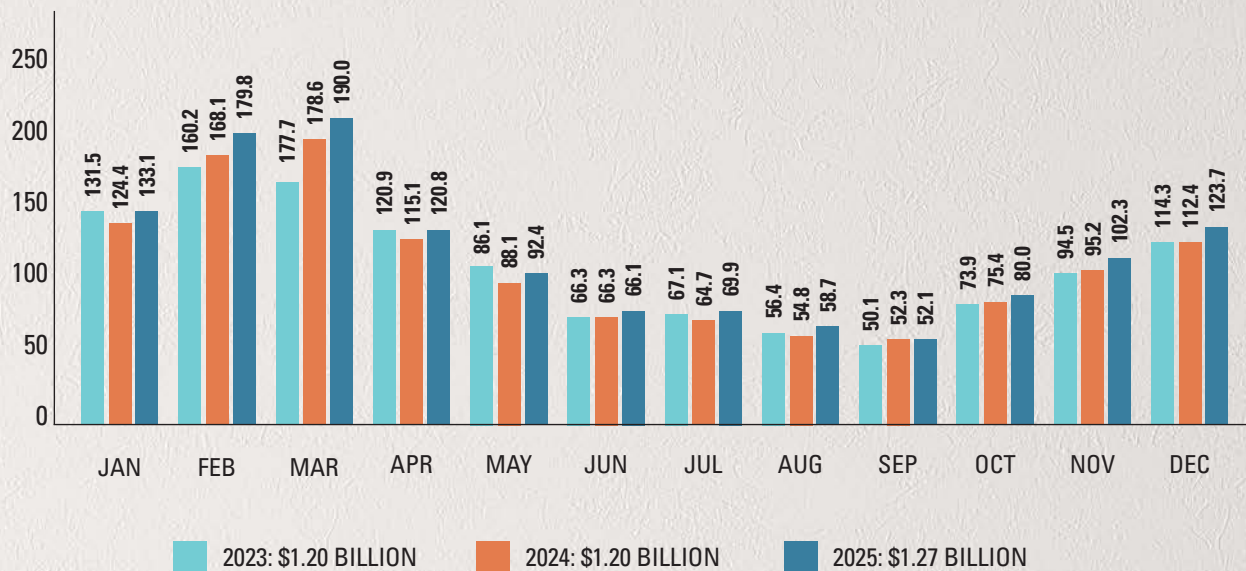


The Palm Beaches Forecast

Overall lodging performance is projected to remain stable for the 2024 calendar year. Despite a leveling off in domestic demand, The Palm Beaches' ability to maintain rate integrity in a competitive environment characterized by discounting, coupled with robust growth in international arrivals and a thriving groups and event sector, positions the destination to sustain its post-pandemic momentum.

This stability sets the stage for further growth in 2025, in alignment with the forthcoming Tourism Master Plan. The long-term growth prospects, driven by the completion and implementation of the Master Plan, are expected to propel The Palm Beaches to unprecedented levels of performance. 2025 should see revenue growth of 5-6%, driven by growth in rate and demand. Full-service properties are expected to lead the growth at a faster pace of more than 6% compared to limited-service properties at closer to 3%.

Hotel Revenue Forecast





FY 2025 Organizational Objectives

- Grow Annual Visitation to 9.6 Million in 2025
- Sell 4.8 Million+ Hotel Room Nights and 1.8 Million+ Shared Lodging Room Nights
- Attribute at least 40% of DTPB Efforts to Hotel Room Nights
- Increase Hotel RevPar to \$175
- Generate \$7.3 Billion+ in Visitor Spending and \$10.6 Billion+ In Economic Impact
- Support 100,000 Leisure & Hospitality Jobs
- Maintain Share of 5.1% of Hotel Room Night Revenue in Florida
- Increase Resident Sentiment to 75%
- Increase Visitation from Diverse Markets to 14%
- Increase the Group Room Night Contribution of Total Occupancy from 20%
- Grow Economic Impact of Events to \$172 Million





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Assistant County Administrator

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Assistant County Administrator

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Chifaa Ghouami – *Account Executive,
Community Engagement*

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