



CSL

PALM BEACH COUNTY

DESTINATION BENCHMARKING REPORT

APRIL 2025

PALM BEACH COUNTY DESTINATION REPORT

This Benchmarking Analysis Report provides a comprehensive evaluation of Palm Beach County's visitor infrastructure, tourism assets, strategies and other elements against a curated set of peer and aspirational destinations.

This Report is divided into two sections:

- 1. Destination DNA Analysis** – This section evaluates Palm Beach County's visitor economy in comparison to selected benchmark destinations, assessing key tourism drivers such as hotel inventory, attractions, events, and cultural assets. It also analyzes visitation trends and tourism-related sales to evaluate both the scale and quality of visitor engagement.
- 2. Story and Strategy Analysis** – This section provides an in-depth qualitative evaluation of how comparable destinations have navigated industry trends, capitalized on their advantages, and addressed challenges. By examining both past and future strategies, this section explores the “why” and “how” behind their successes and shortcomings, offering key insights that can inform Palm Beach County's positioning and competitive approach.

A full listing of the markets that were reviewed and compared with Palm Beach County are provided below.

DOMESTIC (COMPETITIVE)	INTERNATIONAL (ASPIRATIONAL)
Fort Lauderdale	Abu Dhabi
Hamptons (The)	Algarve (The)
Hilton Head Island	Bermuda
Jacksonville + St. Augustine	Gold Coast
Miami	Marbella
Naples	Monaco
Newport	Nassau
San Diego + La Jolla	San Juan
Santa Barbara	St. Barts
Scottsdale	
Tampa + Sarasota	

Key takeaways from both analyses are presented on the following pages, followed by the comprehensive report.

DESTINATION DNA ANALYSIS: KEY TAKEAWAYS

To understand the tourism assets and economies unique to each reviewed destination, CSL conducted a benchmarking analysis for the Palm Beach County Tourism Master Plan that compares the visitation, quality of experiences and tourism-related sales among the comparison set. The goal of this exercise is to identify the unique “DNA” of each destination, identify Palm Beach County’s distinct qualities, and begin to evaluate potential opportunities for destination enhancement to better compete in the global travel industry. The following presents key findings from this exercise.

ASSET VISITATION ANALYSIS

CSL created a comprehensive list of top attractions in various categories for each destination using TripAdvisor, then cross-referenced with Google to ensure accuracy, and gathered positive review counts to identify the top-rated cultural, entertainment, sightseeing, outdoor adventure sites, restaurants, and hotels/resorts. These counts were indexed against total annual visits to gauge popularity relative to each destination’s visitor base, highlighting not the quality, but the popularity of attractions.

- **Culture:** PBC ranks fifth out of 12 U.S. destinations and is nearly tied for 3rd place in the domestic comparison set. PBC’s culture assets ranked third among nine comparable international destinations, indicating that the County’s museums and music venues are highly reviewed and are an important segment of its Top 30 attractions. Considering the degree of exclusivity and luxury associated with several of the global destinations, opportunity could exist to further leverage this strong inventory of museums and music/entertainment venues for invite only events and other private access activations.
- **Entertainment:** PBC ranks fourth amongst domestic destinations in this category, but near the median of the international set. Barring the development of a new casino, amusement park or significant attraction, it is unlikely that PBC can materially improve its entertainment score among the global destinations. However, it may be important to consider building on existing assets to cater to high-value visitors who may also frequent Monaco and The Algarve through initiatives such as VIP shopping experiences on Worth Avenue, immersive behind the scenes tours at Lion Country Safari, and/or high-end nighttime programming at area resorts and restaurants.
- **Sightseeing:** PBC’s sightseeing score ranks near the median of both the domestic and international comparable sets. PBC’s many beaches garner less online reviews than sightseeing assets in domestic and international destinations. This can be interpreted as both a challenge and a strength; because there is no “go to” beach, the destination also avoids overcrowding, pollution and other issues by spreading visitation to its many beaches. An iconic and highly visible piece of public art, signature district, natural area or other landmark in PBC would increase this Sightseeing score.

- **Outdoor Adventure:** PBC performs strongly amongst domestic (fifth out of 12) and international destinations (third) in the outdoor adventure category, and this performance is largely driven by Okeethee Park. In general, these assets appear less frequently in the top 30 attractions of domestic and especially international destinations; however, many are prioritizing increased investment in outdoor adventure and ecotourism product.
- **Lodging:** PBC's lodging score ranks below the median of both comparable and international destinations. This score reflects the unique characteristics of its lodging offerings rather than a deficiency in its inventory; the County is home to high-end, prestigious accommodations like The Breakers, which, despite its high quality and exclusive clientele, tends to receive fewer online reviews. However, opportunities may exist to grow the area's inventory of non-resort, full-service hotel options.
- **Culinary:** PBC's culinary score is near the median score of domestic and international destinations, reflecting a culinary scene with balanced popularity. To further support its luxury identity, opportunity could exist for PBC to enhance special, private outdoor / beachfront dining experiences, or create exclusive and authentic dining events with celebrity chefs and wine pairings at iconic locations like Worth Avenue or on private estates.
- **Overall Domestic Comparison:** PBC ranks just below the median, with an overall score equivalent to Naples and Jacksonville. PBC ranks relatively low in Lodging and Restaurants, which indicates that while PBC offers high quality and exclusivity in these areas, they may not translate to high levels of overall visitation and/or online reviews. In categories such as Outdoor Adventure and Sightseeing, PBC demonstrates strong appeal, yet there is room for increased visibility to elevate its profile among top domestic destinations. PBC's relatively strong performance in Entertainment indicates that the County has a surprising volume of popular entertainment assets, including popular family experiences (zoos, waterpark, etc.).
- **Overall International Comparison:** Amongst international destinations, PBC's overall score is slightly below the median, comparable to Abu Dhabi and the Gold Coast. PBC ranks third in both Culture and Outdoor Adventure, indicating that the County's theaters, museums and outdoor adventure experiences are known to visitors and highly reviewed, especially relative to the size of its visitor base. Conversely, PBC finds itself at sixth in Entertainment, Sightseeing, and Culinary, and eighth in Lodging. These positions reflect average to slightly below average asset popularity across all categories versus top ranking international destinations.

DESTINATIONS SALES ANALYSIS

CSL prepared a comparative analysis of tourism-related sales to measure the strength of the tourism economy in each competitive domestic market. Per capita calculations were also included in this analysis to evaluate the degree to which each market's revenues are driven by non-local spending. Markets with low population but active tourism economies will often have a high revenue per capita figure as they have residents AND a high volume of visitors who spend money, while large metro areas with relatively limited visitation by non-locals will have lower per capita figures.

- **Entertainment/Recreation Spending:** PBC's strong performance in this category underscores a vibrant entertainment and recreation sector, characterized by substantial consumer expenditure on live performances, sports events, and other entertainment at assets like Cacti Park, Roger Dean Stadium, Drive Shack, Rapids Water Park, Lion Country Safari, and the Palm Beach Zoo.
- **Dining Sales:** PBC's per capita dining expenditures are lower (11th out of 12) compared to other domestic destinations, while total sales rank more favorably (5th). This could be attributed to the County's larger residential population diluting per capita figures and could suggest opportunities to develop more high-end restaurant options in the area.
- **Retail Sales:** While PBC's total retail sales rank fifth, a seventh place ranking in per capita sales suggests a more moderate level of spending when adjusted for population base. This ranking indicates that while PBC has a strong retail sector, the per capita spending does not reach the levels observed in some smaller or more tourist-heavy destinations, where visitor spending can disproportionately influence per capita metrics.

STORY & STRATEGY ANALYSIS: KEY TAKEAWAYS

The Story and Strategy Analysis examines tourism performance and destination development strategies across selected destinations, providing insights into asset development, visitor experiences, and branding within the evolving global travel landscape. Findings are based on extensive desk research, including DMO reports, consumer reviews, travel articles, and publicly available data. The following presents key findings from this exercise.

DOMESTIC MARKET STORIES AND STRATEGIES

Benchmarked domestic destinations are categorized into three groups: Year-Round Metros, such as Miami and San Diego, which boast strong tourism infrastructure and steady demand; Momentum Markets, like Jacksonville and Hilton Head, which are rapidly enhancing their appeal through new attractions and investments; and Exclusive Getaways, including The Hamptons and Scottsdale, which cater to affluent travelers with luxury experiences. Key takeaways from each of these categories are summarized below.

- **Year-Round Metros:** Year-round metro destinations like Miami, San Diego, and Fort Lauderdale continue to expand their tourism appeal by integrating luxury with signature events, refining brand identities, activating waterfront assets, and investing in convention infrastructure.
- **Momentum Markets:** Momentum markets like Jacksonville/St. Augustine, Hilton Head, and Naples are leveraging culinary tourism, yachting, ecotourism, and luxury automotive events to attract high-value visitors.
- **Exclusive Getaways:** Exclusive getaways like The Hamptons, Newport, Scottsdale, and Santa Barbara continue to attract high-net-worth visitors through curated luxury events, cultural prestige, and historic charm.

DOMESTIC MARKET VISITOR PREFERENCES

CSL conducted a Visitor Preference Analysis to compare Palm Beach County with 20 peer destinations, evaluating how 14 high-value visitor segments might choose between them for travel or residency. Using Experian's Mosaic USA, which categorizes U.S. households based on lifestyle, interests, and financial status, the study identified key market segments and assessed Palm Beach County's competitiveness in attracting affluent travelers and residents.

- **Preferred Place to Visit:** Palm Beach County excels in the luxury travel market, winning 64% of matchups against peer destinations, particularly among affluent retirees, empty nesters, and established families. While it competes well with Exclusive Getaways like Newport and Scottsdale, its appeal among Power Elite travelers varies, highlighting opportunities to enhance its prestige through exclusive events, luxury brand partnerships, and other initiatives. However, Palm Beach struggles to attract urban luxury seekers relative to its peers, suggesting a need to double down on its high-end appeal rather than compete for a broader tourism base with larger, more diverse markets like Miami and San Diego.
- **Preferred Place to Live:** Palm Beach County ranks as a top-tier residential destination, winning 80% of matchups, reinforcing its appeal as a second-home market for affluent individuals. While its prestige and luxury lifestyle attract high-net-worth residents, the next step is drawing more first-time visitors who could become future homeowners.

GLOBAL MARKET STORIES AND STRATEGIES

The nine global destinations analyzed are categorized into Ultra Luxury, High-End Resort & Lifestyle, and Accessible Caribbean markets. Ultra Luxury destinations like Monaco and St. Barts cater exclusively to ultra-high-net-worth individuals with extreme exclusivity, private clubs, and VIP-only experiences. High-End Resort & Lifestyle markets such as Marbella and The Algarve offer a refined yet more accessible luxury experience, while Accessible Caribbean destinations like Nassau and Bermuda blend high-end offerings with broader tourism accessibility, attracting both affluent travelers and premium leisure visitors.

- **Ultra Luxury:** Ultra-luxury destinations like St. Barts, Abu Dhabi, and Monaco attract the world's wealthiest travelers by combining exclusivity, high-end experiences, and elite social status, reinforced through signature events with luxury-infused lifestyle offerings. These destinations continue to evolve by integrating immersive gastronomy, luxury ecotourism, and high-profile gatherings—such as the Monaco Grand Prix and St. Barts' Gourmet Festival—ensuring they remain prestigious, invitation-only havens for ultra-high-net-worth individuals.
- **High-End Resort & Lifestyle:** High-End Resort & Lifestyle destinations like Marbella, The Algarve, and the Gold Coast are expanding beyond their beach appeal by investing in large-scale festivals, cultural assets, waterfront districts, and outdoor adventure experiences. These destinations attract affluent visitors through signature events, high-end marinas, luxury retail, and eco-tourism initiatives, positioning themselves as dynamic, well-rounded luxury travel hubs.
- **Accessible Caribbean:** Accessible Caribbean destinations like San Juan, Nassau, and Bermuda are enhancing their appeal through cultural and culinary storytelling, expanded water-based tourism, and dynamic entertainment districts. By investing in heritage-driven festivals, luxury yachting experiences, and integrated nightlife and hospitality hubs, these destinations are attracting both high-net-worth travelers and broader affluent audiences.

GLOBAL MARKET VISITOR PREFERENCES

CSL repeated the Visitor Preference Analysis for the global benchmark destinations.

- **Preferred Place to Visit:** Palm Beach County struggles against its global counterparts, winning only 44% of visitor preference matchups, though it excels among multi-generational travelers, second homeowners, and retirees. However, its weak appeal to Power Elite travelers highlights a gap in high-energy nightlife, VIP social scenes, and ultra-exclusive experiences, where destinations like Monaco, St. Barts, and Abu Dhabi continue to dominate.
- **Preferred Place to Live:** Palm Beach County ranks as a top-tier global residential destination, winning 98% of matchups, reinforcing its appeal to high-net-worth individuals, retirees, and affluent families seeking exclusivity and long-term livability. The key opportunity lies in leveraging its residential dominance to drive tourism growth by attracting first-time visitors who may transition into second-home buyers or permanent residents.

STORY AND STRATEGY KEY TAKEAWAYS

Palm Beach County stands out as a premier luxury destination among its U.S. peers, outperforming Exclusive Getaways like Newport and Scottsdale with its refined lifestyle, strong residential appeal, and well-established high-net-worth visitor base. However, while it excels in attracting affluent families, retirees, and second homeowners, it has room to grow in appealing to younger ultra-wealthy travelers seeking high-energy, immersive experiences. On the global stage, Palm Beach lacks the “wow” factor of elite destinations like Abu Dhabi, Monaco, and St. Barts, which captivate visitors with ultra-exclusive nightlife, luxury brand collaborations, and spectacle-driven tourism. It also does not offer the same level of cultural immersion and authenticity found in places like Nassau or San Juan, where history, music, and gastronomy create a deeper emotional connection with visitors. Moving forward, the County may want to decide whether to deepen its high-end, multi-generational appeal or enhance its nightlife, cultural prestige, and exclusive experiences to better attract the younger ultra-wealthy and compete with the world’s most elite destinations.

POTENTIAL OPPORTUNITIES

Based on the Story and Strategy analysis, CSL has developed the following list of preliminary ideas for further developing Palm Beach County as a world-class destination. This list is further detailed in the Appendix.

POTENTIAL PALM BEACH COUNTY DESTINATION DEVELOPMENT OPPORTUNITIES

Exclusive Travel Experiences

1. Yacht Charters And Marina Enhancements
2. Private Jet Services
3. Brightline Partnership

Luxury Accommodations

4. Exclusive Villas and Estates for Rent
5. Private Island Experiences
6. High-End, One of a Kind Beach Clubs
7. Influence Retreat House

Cultural Immersion

8. Private Art Tours and Commissions
9. Historic Landmark Buyouts

Adventure & Exploration

10. Luxury Safari-Style Wildlife Experiences
11. Underwater Adventures
12. Glamping Development

Wellness & Relaxation

13. Luxury Spa Retreats
14. Private Fitness and Wellness Coaches

Exclusive Events & Experiences

15. Private Concerts and Entertainment
16. VIP Polo and Equestrian Packages
17. Gastronomic Experiences

Philanthropic Experiences

18. Conservation Partnerships
19. Cultural Preservation

High-End Hobbies

20. Private Golf Courses
21. Luxury Car Tours
22. Customized Fashion Experiences

Tailored Luxury Shopping

23. Exclusive Jewelry Design
24. Private Shopping on Worth Avenue

Festivals and Events

25. High-End Destination Festival
26. Prioritize High-Impact Meetings

Cultivating Culinary

27. Growing High-End Dining
28. Growing Experiential Dining
29. Agritourism as a Storyteller

Event Facility Investment

31. Sports Facilities
32. Conventions and Entertainment Facilities

INTRODUCTION

Palm Beach County stands as a premier luxury destination, yet continued success in the evolving travel landscape requires a deep understanding of how it compares to both its direct competitors and aspirational peers. This Benchmarking Analysis Report provides a comprehensive evaluation of Palm Beach County’s visitor infrastructure, tourism assets, financial resources, and planning strategies against a curated set of peer and aspirational destinations. By identifying strengths, gaps, and opportunities, this analysis offers valuable insights into best practices that have helped other destinations thrive and attract millions of visitors and residents in recent years.

To ensure a structured and actionable approach, this benchmarking study is divided into two key sections:

- 1. Asset and Visitation Analysis** – This section evaluates Palm Beach County’s visitor economy in comparison to selected benchmark destinations, assessing key tourism drivers such as hotel inventory, attractions, events, and cultural assets. It also analyzes visitation trends and tourism-related sales to evaluate both the scale and quality of visitor engagement.
- 2. Story and Strategy Analysis** – This section provides an in-depth qualitative evaluation of how comparable destinations have navigated industry trends, capitalized on their advantages, and addressed challenges. By examining both past and future strategies, this section explores the “why” and “how” behind their successes and shortcomings, offering key insights that can inform Palm Beach County’s positioning and competitive approach.

The selected benchmarking destinations include both direct competitors such as Miami, Naples, and Fort Lauderdale, as well as aspirational peers like Monaco, Abu Dhabi, and St. Barts. A full listing of the markets that were reviewed and compared with Palm Beach County are provided below.

DOMESTIC (COMPETITIVE)	INTERNATIONAL (ASPIRATIONAL)
Fort Lauderdale	Abu Dhabi
Hamptons (The)	Algarve (The)
Hilton Head Island	Bermuda
Jacksonville + St. Augustine	Gold Coast
Miami	Marbella
Naples	Monaco
Newport	Nassau
San Diego + La Jolla	San Juan
Santa Barbara	St. Barts
Scottsdale	
Tampa + Sarasota	

This report ultimately serves as a strategic tool to guide Palm Beach County’s destination development efforts, identifying actionable insights that can strengthen its tourism industry, elevate its global positioning, and drive increased market share.

DESTINATION DNA ANALYSIS

To understand the tourism assets and economies unique to each reviewed destination, CSL conducted a benchmarking analysis for the Palm Beach County Tourism Master Plan that compares the visitation, quality of experiences and tourism-related sales among the comparison set. The goal of this exercise is to identify the unique “DNA” of each destination, identify Palm Beach County’s distinct qualities, and begin to evaluate potential opportunities for destination enhancement to better compete in the global travel industry.







This analysis is segmented into the following two parts:

- **A. Asset Visitation Analysis:** Comparison of positive reviews of destination assets relative to the size of each destination’s visitor base. This highlights the overall popularity of various assets and the importance of their roles within their respective destinations.
- **B. Destination Sales Analysis:** Comparison of tourism-related sales in each domestic destination to identify the strength of various sectors in each destination. This includes evaluations of entertainment, restaurant, and retail sales.

A. ASSET VISITATION ANALYSIS

Using online resources such as Trip Advisor, Yelp, and Google reviews, CSL has benchmarked Palm Beach County’s inventory of tourism assets with those offered by the 20 selected competitive and aspirational destinations. Six key categories were defined for this analysis: arts and culture-related venues, attractions and experiences in the markets, sightseeing opportunities and landmarks, opportunities for outdoor adventure, culinary scenes/dining options, and inventory of lodging properties including destination resorts and hotels. We begin with an overview of these six tourism product groupings and their respective elements:

TOURISM PRODUCT GROUPINGS AND COMPONENTS

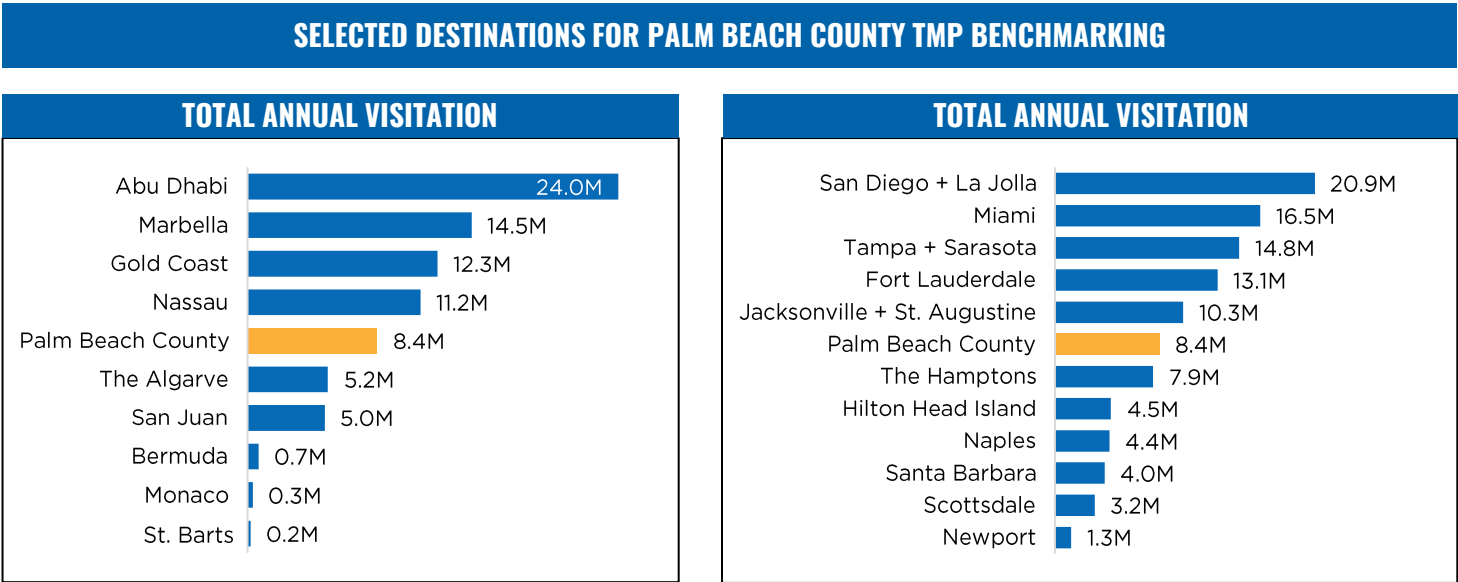
 CULTURE	 ENTERTAINMENT	 SIGHTSEEING	 OUTDOOR ADVENTURE	 CULINARY	 LODGING
<ul style="list-style-type: none">▪ Museums▪ Theaters▪ Performing Arts Centers▪ Concert Venues	<ul style="list-style-type: none">▪ Shopping▪ Nightlife▪ Theme Parks▪ Zoos & Aquariums▪ Casinos▪ LBE / Fun & Games	<ul style="list-style-type: none">▪ Landmarks / Monuments▪ Parks▪ Beaches▪ Nature Preserves▪ Botanical Gardens	<ul style="list-style-type: none">▪ Boat / Rafting Tours▪ Snorkeling / Surfing▪ Paragliding / Sky Diving▪ Bungee Jumping▪ Zip Lining / Ropes Courses	<ul style="list-style-type: none">▪ Restaurants▪ Cafés	<ul style="list-style-type: none">▪ Hotels▪ Resorts

To compare these inventories across destinations, CSL began by utilizing Trip Advisor to create a comprehensive list of each domestic and international destination’s top culture, entertainment, sightseeing, outdoor adventure, culinary and lodging assets. CSL cross referenced these lists with Google to ensure a comprehensive and representative set of elements for each destination and then collected total positive Google review counts for all assets identified. These review counts were ultimately utilized to identify the Top 30 attractions (categorized as either culture, entertainment, sightseeing or outdoor adventure), Top 20 restaurants and Top 20 hotel/resorts in each destination (“top” indicates most positive Google reviews).

To account for differences in market size and overall visitation levels, the results were indexed by total annual visits to the destination. Importantly, these final scores should not be interpreted as a direct measurement of asset quality, but rather an indicator of how popular a given group of assets is relative to a destination’s visitor base. A high score indicates that a comparable destination has more positive reviews associated with an asset category than its number of visitors would imply, and a low score means an asset type does not have significant “mainstream” presence in the destination. For example, a destination that offers luxury hotels may register a low score because these properties operate at a high price point and are therefore somewhat exclusive.

To establish visitor volumes for the comparison set, CSL collected annual visitation data for each destination using Placer.ai and other sources. Note that visitation for the domestic markets represents their respective countywide visitation figures, while global market data only include data reported for that individual city and/or surrounding region.

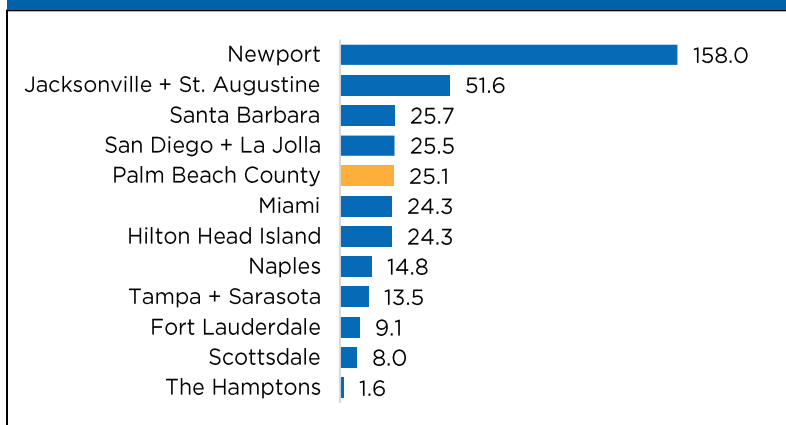
As shown, Palm Beach County ranks at or near the median among both comparison sets. The destination ranks 6th out of 12 among its domestic peers and 5th out of 10 among global markets with its 8.4 million visitors in 2024. These rankings will be important to consider for forthcoming analyses herein.



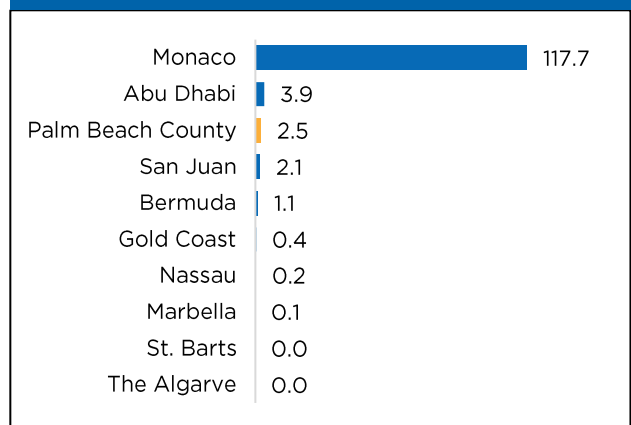
To account for differences between domestic and international markets, these comparable sets were analyzed independently from one another. Comparative domestic and international bar chart analyses for each destination product category are presented on the subsequent pages, followed by a summary table for each comparable destination set.

CULTURE COMPARISON (TOTAL REVIEWS INDEXED BY VISITORS TO DESTINATION)

DOMESTIC MARKETS



INTERNATIONAL MARKETS

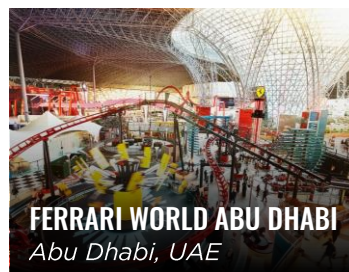
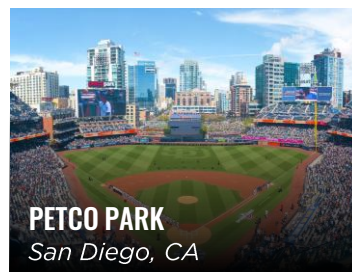
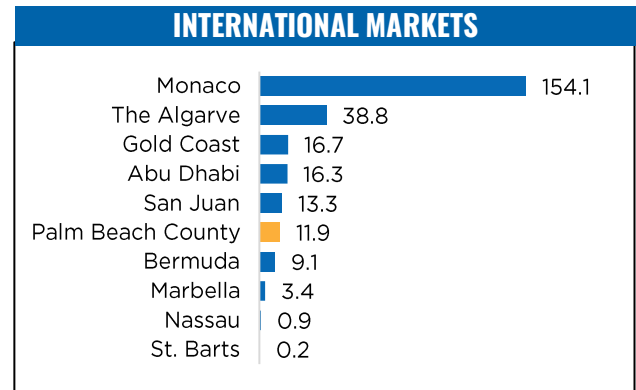
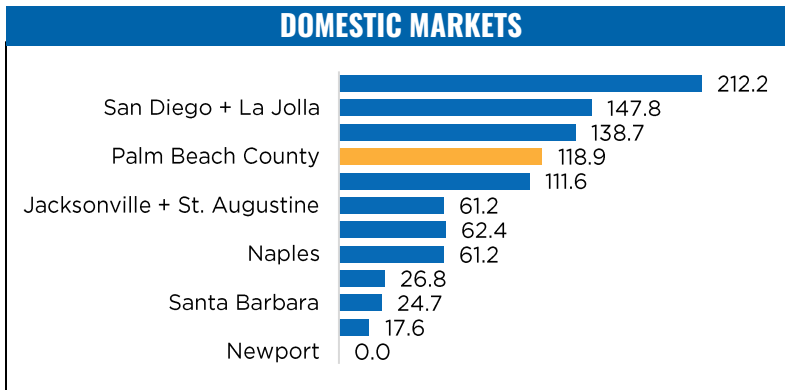


The Culture asset category includes museums and live entertainment assets such as performing arts centers, theaters, concert halls, amphitheaters and other venues. Each destination's total Google reviews for Culture assets appearing in their Top 30 attractions list were indexed against their total number of annual visitors, and the resulting data are presented in the separate domestic and international charts above.

Key Culture assets among domestic destinations include: The Breakers in Newport, the USS Midway Museum in San Diego, and the St. Augustine Amphitheater in Jacksonville. PBC ranks fifth out of 12 U.S. destinations and is nearly tied for 3rd place in the domestic comparison set. This indicates that PBC's cultural asset visibility is generally congruent with its annual visitation, and the popularity of its cultural assets relative to its visitor base is similar to destinations like Santa Barbara, San Diego and Miami.

Notable culture assets in the global destinations include the Oceanographic Museum of Monaco, the Louvre Abu Dhabi, and the Centro De Bellas Artes in San Juan. Generally, Culture assets were less prevalent among the international comparison set than domestic, and some destinations (Saint Barthelemy, The Algarve) had no Culture assets in their Top 30 attractions. PBC's culture assets ranked third among nine comparable international destinations, indicating that the County's museums and music venues are highly reviewed and are an important segment of its Top 30 attractions relative to selected aspirational international destinations. Considering the degree of exclusivity and luxury associated with several of the global destinations, opportunity could exist to further leverage this strong inventory of museums and music/entertainment venues for invite only events and other private access activations.

ENTERTAINMENT COMPARISON (TOTAL REVIEWS INDEXED BY VISITORS TO DESTINATION)



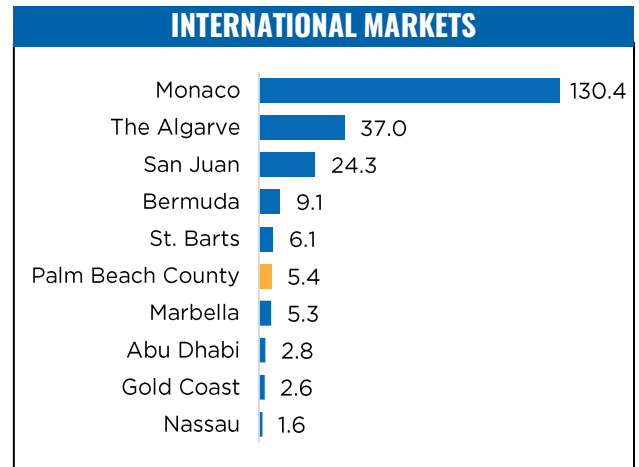
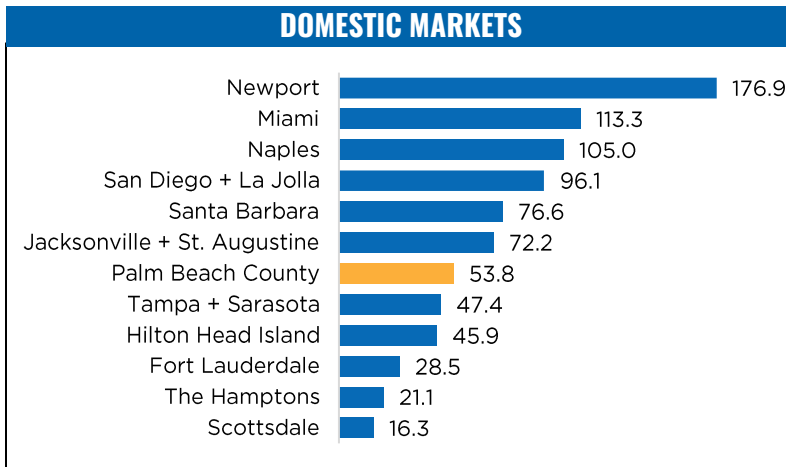
The Entertainment asset category comprises shopping centers/destinations, theme parks and waterparks, zoos, aquariums, casinos, location-based entertainment, and other attractions.

Key entertainment assets in domestic markets include family attractions like Zoo Miami and Busch Gardens in Tampa, professional sports venues like Petco Park in San Diego, and various destination shopping centers. Entertainment assets in PBC's Top 30 achieved the fourth highest score in the domestic competitive set, ranking only behind Tampa, San Diego and Miami. PBC has a high volume of popular entertainment assets, including well-reviewed family experiences like Lion Country Safari and several shopping centers, such as CityPlace WPB and the Gardens Mall, with high positive review counts.

Conversely, PBC ranks near the median of the global comparison set, slightly behind the Gold Coast, Abu Dhabi San Juan and the Algarve. These destinations offer some combination of highly visible theme parks, water parks and zoos (Warner Bros. Movie World, Ferrari World Abu Dhabi, Zoomarine Algarve), very large shopping centers and neighborhoods/districts (Yas Mall, Plaza Las Americas, Aqua Portimão) and iconic nightlife venues such as Casino of Monte Carlo in Monaco. Markets below PBC in this scoring category include smaller island destinations like Bermuda, Nassau and Saint Barthélemy, destinations with Top 30 attractions that are less likely to include highly visible entertainment assets and are more likely to include sightseeing and outdoor adventure opportunities for visitors.

Barring the development of a new casino, amusement park or significant attraction, it is unlikely that PBC can materially improve its entertainment score among the global destinations. However, it may be important to consider building on existing assets to cater to high-value visitors who may also frequent Monaco and The Algarve through initiatives such as VIP shopping experiences on Worth Avenue, immersive behind the scenes tours at Lion Country Safari, and/or high-end nighttime programming at area resorts and restaurants.

SIGHTSEEING COMPARISON (TOTAL REVIEWS INDEXED BY VISITORS TO DESTINATION)

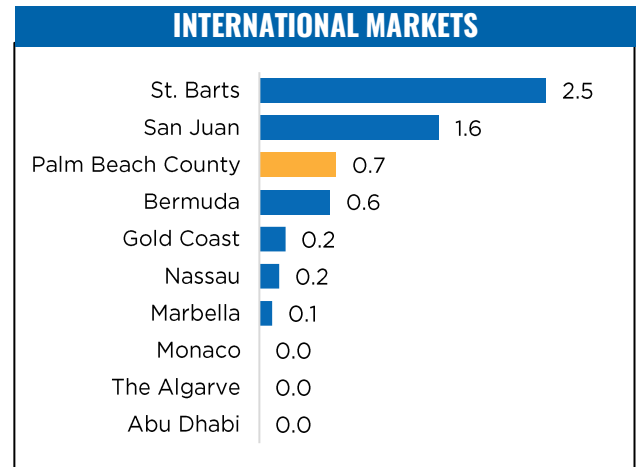
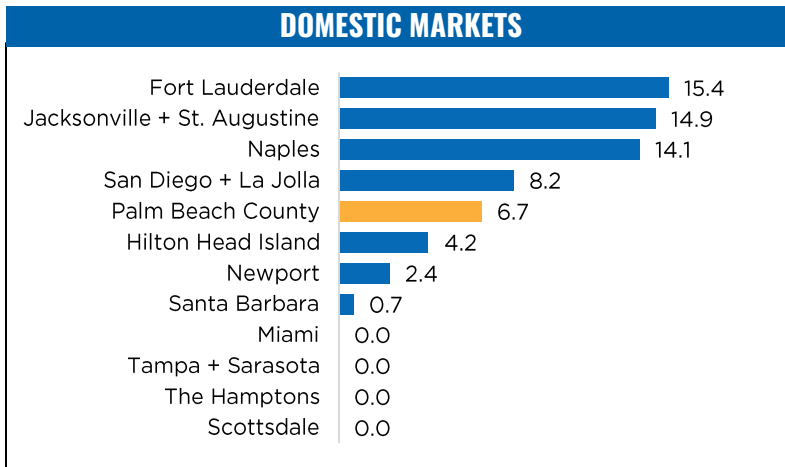


The Sightseeing asset category comprises natural landmark including parks, beaches, waterfalls, rock formations and caves, as well as manmade sights including castles, churches, lighthouses, murals, and other public art/sculptures.

PBC's sightseeing score ranks slightly below the median of the domestic comparison set. While having a comparable number of sightseeing assets, the competitive destinations reviewed possess Sightseeing assets in their Top 30 attractions which are more well-known to travelers, like the Wynwood Walls in Miami, Siesta Beach in Tampa, Balboa Park in San Diego or the Everglades National Park in Naples. PBC's many beaches (Juno, DuBois, Riviera Municipal, etc.) garner less online reviews than sightseeing assets in competitive domestic destination—there isn't a signature beach in PBC which has achieved significant online attention and review volume. This could be seen as both a challenge and a strength; because there is no "go to" beach, the destination also avoids overcrowding, pollution and other issues by spreading visitation to its many beaches.

Culture assets of note amongst international destinations include well-known natural landmarks like the Ponta de Piedade in The Algarve, man-made structures like the Queen's Staircase in Nassau, and various parks/beaches like Ocean Park in San Juan. Like the competitive domestic analysis, PBC's sightseeing score is near the median of the comparable international set. Relative to its annual visitation, PBC has an expected/average level of sightseeing positive review volume compared to these aspirational destinations. An iconic and highly visible piece of public art, signature district, natural area or other landmark in PBC would increase this Sightseeing score.

OUTDOOR ADVENTURE COMPARISON (TOTAL REVIEWS INDEXED BY VISITORS TO DESTINATION)



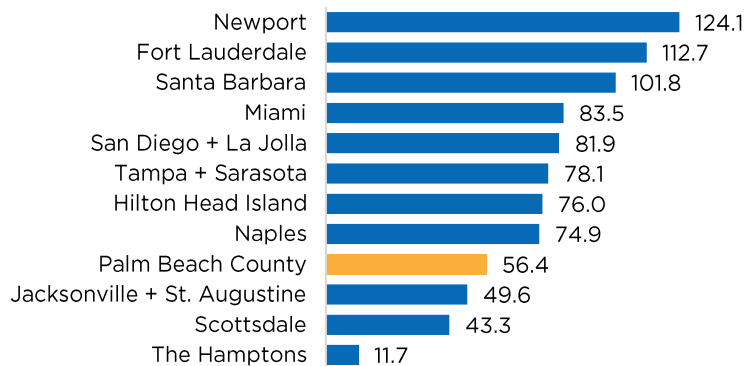
The Outdoor Adventure category encompasses interactive natural environment experiences such as snorkeling, scuba diving, boat tours, paragliding, and ziplining.

In the domestic comparison, Palm Beach County (PBC) ranks fifth. This ranking indicates that PBC's outdoor activities, like Okeeheelee Park, are relatively popular and garner high rates of positive reviews online. Top-ranked destinations in this category, such as Fort Lauderdale, Jacksonville, are more well known for their adventure-centric offerings, like Everglades Airboat tours and fishing excursions. It is notable that some destinations scored a zero in this category, as outdoor adventure assets in these destinations are being pushed out of the Top 30 by Culture, Entertainment and Sightseeing assets.

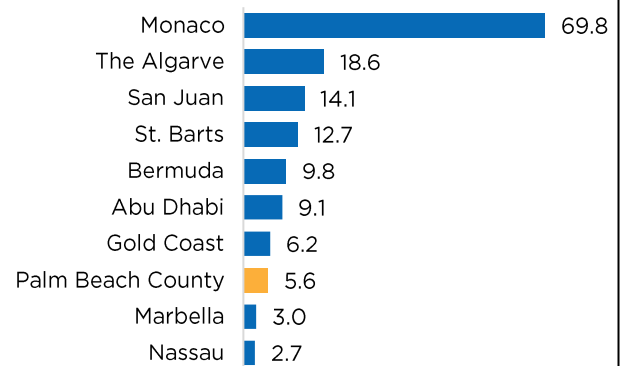
Internationally, PBC ranks third. It is notable that Outdoor Adventure assets appear less frequently in the Top 30 attractions of international destinations than they do in the domestic comparison set. However, as will be discussed in the Story and Strategy Analysis, many of these destinations are prioritizing increased investment in their outdoor adventure and ecotourism product.

LODGING COMPARISON (TOTAL REVIEWS INDEXED BY VISITORS TO DESTINATION)

DOMESTIC MARKETS



INTERNATIONAL MARKETS



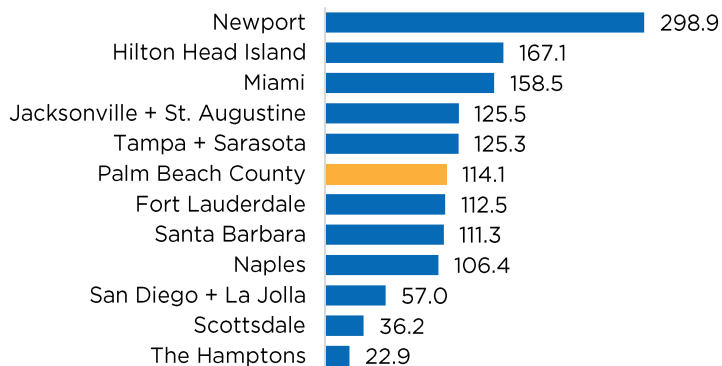
The Lodging category examines the popularity and visibility of the top 20 hotels and resorts in each destination, based on the volume of positive Google reviews they receive.

Domestically, Palm Beach County (PBC) ranks fourth to last, a position that reflects the unique characteristics of its lodging offerings rather than a deficiency. The County is home to high-end, prestigious accommodations like The Breakers, which, despite its high quality and exclusive clientele, tends to receive fewer online reviews. This trend can in part be attributed to the affluent nature of its guests, who may be less inclined to leave public reviews on platforms like Google. Therefore, PBC's lower rank in this category is indicative of the marketability of its lodging options to the average traveler rather than the quality or volume of these accommodations. However, considering previous analysis, opportunity may exist to grow the area's inventory of non-resort, full-service hotel options.

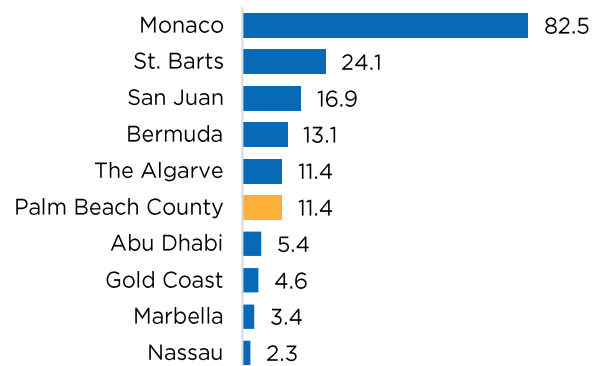
Internationally, PBC ranks third from the last, similarly indicating that while its hotels and resorts are of high caliber, they do not generate extensive online traffic in terms of reviews. Strong performers in this category (Monaco, The Algarve, San Juan) are supported by all-inclusive family resorts like Aquashow Water Park and Hotel or the Ukino Palmeiras Village in The Algarve and resort casinos like the Sheraton and Marriott in San Juan. Top lodging in destinations that rank near PBC comprises more private, beachfront hotels and resorts, including beach clubs like the Hamilton Princess in Bermuda.

CULINARY COMPARISON (TOTAL REVIEWS INDEXED BY VISITORS TO DESTINATION)

DOMESTIC MARKETS



INTERNATIONAL MARKETS



The Culinary category represents the restaurant scene of each destination, focusing on the top 20 eateries as measured by the volume of positive Google reviews.

Domestically, Palm Beach County (PBC) is positioned near the median. This placement signifies a balanced culinary scene (average level of restaurants with high review counts) compared to destinations like Miami and Hilton Head Island, which rank higher due to their greater number of restaurants with mainstream visibility and high online engagement. High scoring domestic destinations are driven by authentic and iconic local eateries, like Miami's cultural dining scene (Havana Harry's, CVI.CHE 105) or waterfront seafood spots in Newport and Hilton Head (Skull Creek Boathouse, The Mooring Seafood Kitchen & Bar).

On the international front, PBC ranks sixth. The combined reviews of the Top 20 restaurants in PBC are proportional to the County's total number of annual visitors, relative to the selected international destinations, indicating a high-end restaurant base that is moderately visible and reviewed. This does not necessarily indicate that PBC's top restaurants are higher quality than destinations ranking below it in Culinary score, or of worse quality than those scoring above it in this category—high end restaurants do not always garner more positive online reviews than more popular, mainstream eateries. Notable dining amongst international destinations includes Al Khayma Heritage restaurant in Abu Dhabi and NoSoloAqua in The Algarve.

To further support its luxury identity, opportunity could exist for PBC to enhance special, private outdoor/beachfront dining experiences, or create exclusive and authentic dining events with celebrity chefs and wine pairings at iconic locations like Worth Avenue or on private estates. This is discussed further as part of the Story and Strategy Analysis herein.

DOMESTIC SCORING SUMMARY

DESTINATION AMENITY SATISFACTION MATRIX

MARKET	CULTURE	ENTERTAINMENT	SIGHTSEEING	OUTDOOR ADVENTURE	LODGING	CULINARY	TOTAL
Newport	158.0	0.0	176.9	2.4	124.1	298.9	760.4
Miami	24.3	138.7	113.3	0.0	83.5	158.5	518.2
Tampa + Sarasota	13.5	212.2	47.4	0.0	78.1	125.3	476.6
San Diego + La Jolla	25.5	147.8	96.1	8.2	81.9	57.0	416.4
Jacksonville + St. Augustine	51.6	77.9	72.2	14.9	49.6	125.5	391.6
Naples	14.8	61.2	105.0	14.1	74.9	106.4	376.4
Palm Beach County	25.1	118.9	53.8	6.7	56.4	114.1	375.0
Fort Lauderdale	9.1	87.7	28.5	15.4	112.7	112.5	365.9
Hilton Head Island	24.3	26.8	45.9	4.2	76.0	167.1	344.3
Santa Barbara	25.7	24.7	76.6	0.7	101.8	111.3	340.7
Scottsdale	8.0	62.4	16.3	0.0	43.3	36.2	166.2
The Hamptons	1.6	17.6	21.1	0.0	11.7	22.9	74.9
AVERAGE	32.4	77.9	72.7	5.4	76.1	120.1	384.7
PALM BEACH COUNTY VS. AVERAGE	-7.3	41.0	-18.9	1.2	-19.7	-6.0	-9.6
PALM BEACH COUNTY RANK (OUT OF 12)	5	4	7	5	9	6	7

The summary table above presents PBC's score in each of the six asset categories among its 11 domestic peer destinations. The table is sorted by cumulative scores across all categories, which are presented in the right-most column. PBC ranks just below the median, with a total score of 375.0 which ranks similarly with Naples and Jacksonville. This evaluation reveals varied performance across the six asset categories reviewed; particularly, PBC ranks relatively low in Lodging and Restaurants, which indicates that while PBC offers high quality and exclusivity in these areas, they may not translate to high levels of overall visitation and/or online reviews. In categories such as Outdoor Adventure and Sightseeing, PBC demonstrates strong appeal, yet there is room for increased visibility to elevate its profile among top domestic destinations. PBC's relatively strong performance in Entertainment indicates that the County has a surprising volume of popular entertainment assets, including visible family experiences like Lion Country Safari and several shopping centers with high positive review counts.

GLOBAL SCORING SUMMARY

DESTINATION AMENITY SATISFACTION MATRIX

MARKET	CULTURE	ENTERTAINMENT	SIGHTSEEING	OUTDOOR ADVENTURE	LODGING	CULINARY	TOTAL
Monaco	117.7	154.1	130.4	0.0	69.8	82.5	554.5
The Algarve	0.0	38.8	37.0	0.0	18.6	11.4	105.9
San Juan	2.1	13.3	24.3	1.6	14.1	16.9	72.3
St. Barts	0.0	0.2	6.1	2.5	12.7	24.1	45.5
Bermuda	1.1	9.1	9.1	0.6	9.8	13.1	42.9
Abu Dhabi	3.9	16.3	2.8	0.0	9.1	5.4	37.5
Palm Beach County	2.5	11.9	5.4	0.7	5.6	11.4	37.5
Gold Coast	0.4	16.7	2.6	0.2	6.2	4.6	30.7
Marbella	0.1	3.4	5.3	0.1	3.0	3.4	15.3
Nassau	0.2	0.9	1.6	0.2	2.7	2.3	7.9
AVERAGE	14.0	28.1	24.4	0.6	16.2	18.2	101.4
PALM BEACH COUNTY VS. AVERAGE	-11.5	-16.2	-19.0	0.1	-10.6	-6.8	-63.9
PALM BEACH COUNTY RANK (OUT OF 10)	3	6	6	3	8	6	7

The summary table above presents PBC's score in each of the six asset categories, compared to nine international destinations. The analysis, places PBC towards the middle and lower tiers in most categories. The County's overall score of 37.5 is comparable with Abu Dhabi and the Gold Coast. More specifically, PBC ranks third in both Culture and Outdoor Adventure, indicating that the County's theaters, museums and outdoor adventure experiences are known to visitors and highly reviewed, especially relative to the size of its visitor base. Conversely, PBC finds itself at sixth in Entertainment, Sightseeing, and Culinary, and eighth in Lodging. These positions reflect average to slightly below average asset visibility in these categories versus top ranking international destinations like Monaco, which ranks highly overall due to its small visitor base (300,000 visitors per year) but highly reviewed assets in all categories.

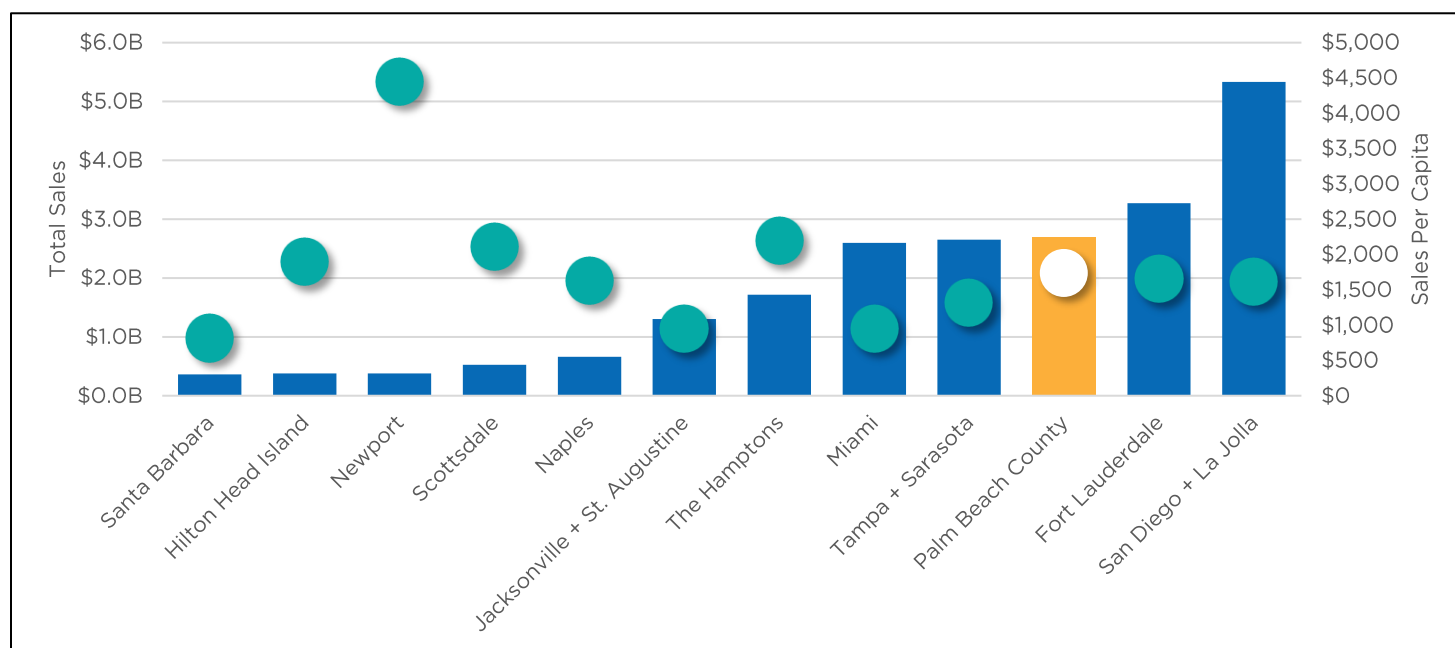
B. DESTINATION SALES ANALYSIS

Using the business analytics functions of Esri (a GIS mapping and information software company), a comparative analysis of tourism-related sales has also been prepared to measure the strength of the tourism economy in each competitive domestic market. The charts below and on the following pages provide comparisons of the entertainment / recreation, eating & drinking, and retail sales generated within the County and each of the 11 comparable / competitive domestic destination (using County data for each).

To evaluate the degree to which each market's revenues are driven by non-local spending, per capita calculations have also been prepared. Markets with low population but active tourism economies will often have a high revenue per capita figure as they have residents AND a high volume of visitors who spend money, while large metro areas with relatively limited visitation by non-locals will have lower per capita figures.

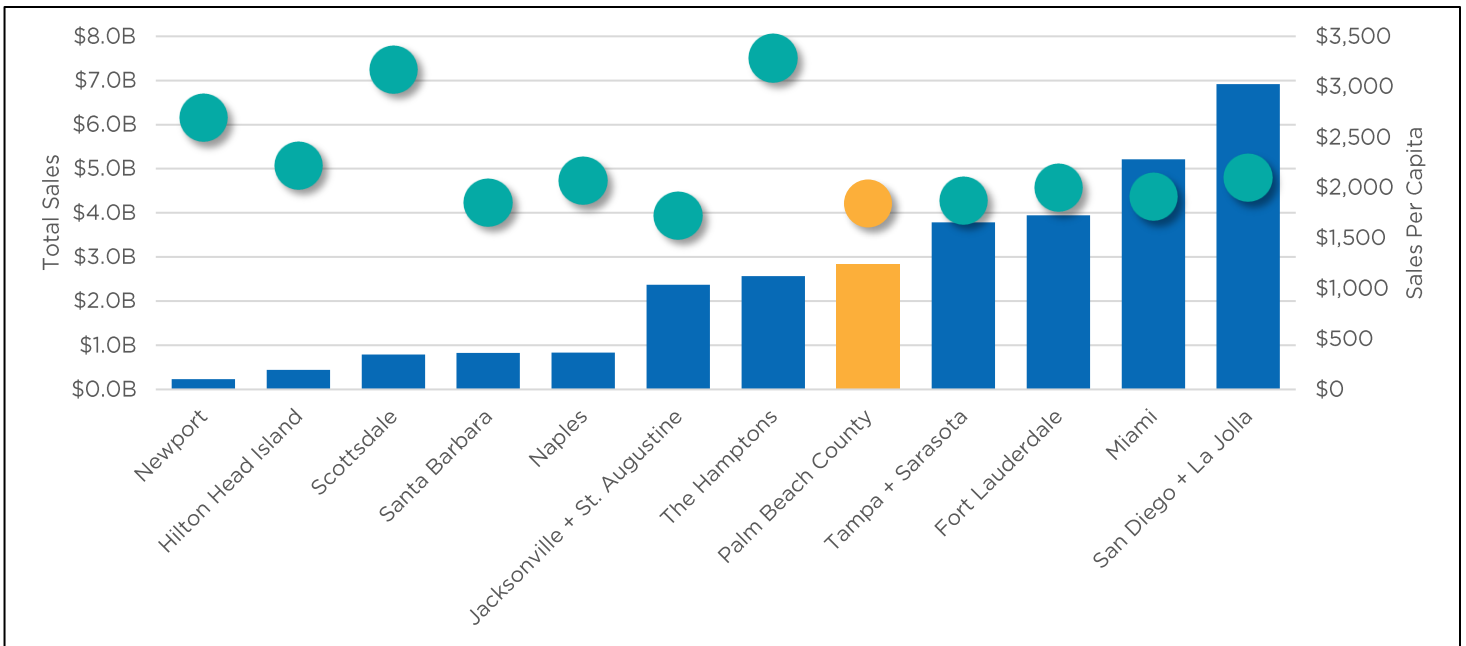
We begin with a comparison of entertainment / recreation sales below. This metric includes payments to attend live performances, participate in sports, and gain admission to theme parks and entertainment attractions, among other items.

ENTERTAINMENT / RECREATION SALES COMPARISON



In the sector of entertainment and recreation sales, PBC performs strongly compared with the 11 selected competitive domestic destinations, ranking third in total sales and fifth in per capita sales. These rankings underscore PBC's vibrant entertainment and recreation sector, characterized by substantial consumer expenditure on live performances, sports events, and other entertainment at assets like Cacti Park, Roger Dean Stadium, Drive Shack, Rapids Water Park, Lion Country Safari, and the Palm Beach Zoo.

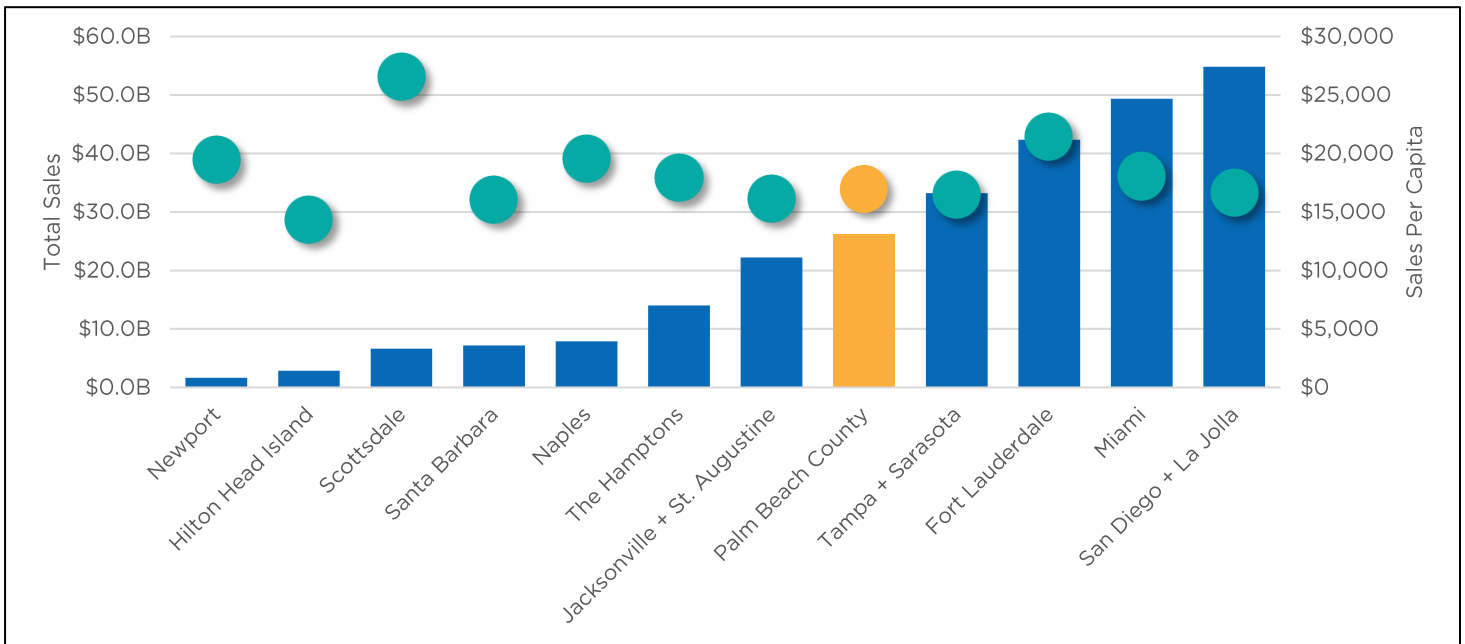
DINING SALES COMPARISON



In the comparative analysis of dining sales among domestic markets, PBC secures the fifth position in total dining sales but ranks eleventh out of twelve in per capita dining sales.

The eleventh-place ranking in per capita dining sales suggests that while total sales are high, the per capita expenditure is lower compared to other domestic destinations. This could be attributed to a larger residential population that dilutes the per capita figures. In contrast, a destination like Scottsdale might rank high in per capita dining sales due to its smaller local population coupled with a substantial influx of visitors, which boosts spending relative to the number of residents. These data may suggest the opportunity to develop more high-end restaurant options in PBC.

RETAIL SALES COMPARISON



In the comparative analysis of retail sales among domestic markets, PBC ranks fifth in total sales and seventh in per capita sales. The fifth-place position in total sales reflects a robust retail environment within the County, indicating a strong consumer base and a robust market for retail transactions facilitated by multiple high end shopping centers located throughout the County.

The seventh place ranking in per capita sales suggests a more moderate level of spending when adjusted for the size of the population compared to other destinations. This middle-tier ranking indicates that while PBC has a strong retail sector, the per capita spending does not reach the levels observed in some smaller or more tourist-heavy destinations, where visitor spending can disproportionately influence per capita metrics.

STORY AND STRATEGY ANALYSIS

The Story and Strategy Analysis that follows focuses on the tourism performance and destination development strategies in each of the selected destinations. This analysis provides important insights regarding the asset development for each destination, existing experiences and brands they deliver, and their strategies in the ever-changing global travel landscape.

The analysis and findings were derived from a combination of in-depth research of DMO websites, reports and strategic plans; thorough reviews of consumer reviews on Google, Trip Advisor, and Reddit; detailed analysis of travel writer articles and blog posts; and evaluation of other available publicly available information.

The collected data were reviewed and summarized by the project team, and then used to develop summaries of destination strengths, the challenges they still face, and opportunities that might be transferable to Palm Beach County. A summary of the primary topics is illustrated below.

STORY AND STRATEGY ANALYSIS TOPICS



BRAND



CHALLENGES



RESPONSE TO TRENDS



STRATEGIES



**TARGET VISITOR
PREFERENCES**



**TRANSFERRABLE IDEAS
FOR PBC**

The remainder of this section presents key findings for the domestic and global comparative destinations, followed by a “Visitor Preference Analysis” for each category that analyzes the destinations where high-value visitor segments would prefer to visit and/or live and why. This analysis concludes with a list of opportunities for Palm Beach County to consider regarding destination development based on the analysis.

Detailed case studies from each of the 20 destinations are presented in the Appendix.

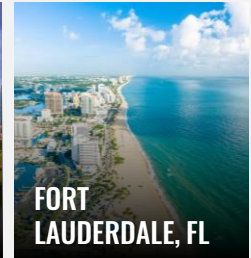
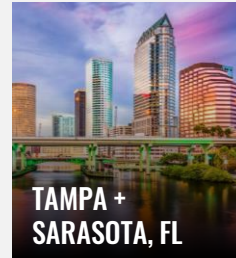
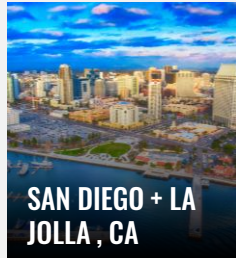
STORY AND STRATEGY ANALYSIS: DOMESTIC MARKETS

For purposes of this analysis the comparable destinations reviewed have been segmented into the following three categories.

DOMESTIC MARKET CASE STUDIES

YEAR-ROUND METROS

Larger tourism destination with strong brand recognition, diverse visitor appeal, and well-established hospitality infrastructure



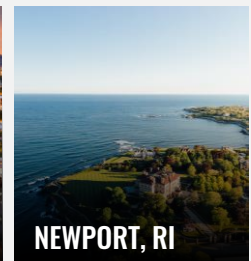
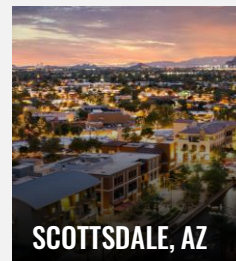
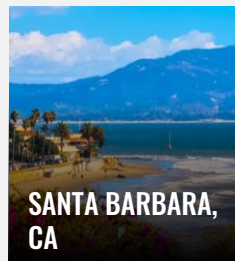
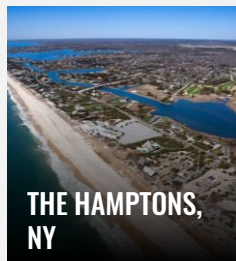
MOMENTUM MARKETS

Competitive tourism markets with strong appeal that are further elevating their position through sustained growth and evolving offerings



EXCLUSIVE GATEWAYS

High-end getaway destinations that offer a blend of sophistication, scenic beauty, and premium hospitality experiences



Year-Round Metros are among the most well-established tourism markets in the country, boasting strong brand recognition, diverse visitor appeal, and a well-developed hospitality infrastructure. Cities like Miami, San Diego, and Tampa consistently attract a wide variety of tourists with their warm climates, vibrant nightlife, cultural attractions, and coastal charm. They benefit from steady demand across all seasons, fueled by a mix of leisure travelers, business tourism, and event-driven visitors. Their economies are deeply intertwined with tourism, offering a broad range of accommodations that can cater to various income levels, entertainment districts, and major international airports that support their accessibility and global reach.

Momentum Markets are on a strong upward trajectory, leveraging their existing appeal to attract a larger share of visitors while enhancing their tourism infrastructure. Places like Jacksonville & St. Augustine, Hilton Head, and Naples are evolving into more competitive travel markets by investing in new attractions, improving accessibility, and expanding hospitality offerings. Whether through revitalized downtowns, luxury resorts, or growing culinary scenes, these markets are positioning themselves as top-tier alternatives to the more established metros. Their appeal is often rooted in a balance between natural beauty, historical charm, and an increasingly sophisticated visitor experience.

Exclusive Getaways cater to affluent travelers seeking a refined and luxurious escape. Locations such as The Hamptons, Santa Barbara, Scottsdale, and Newport are renowned for their scenic beauty, high-end accommodations, and exclusive experiences. Whether it's waterfront mansions, elite golf resorts, or boutique shopping districts, these markets thrive on their reputation for sophistication and privacy. They often attract second-home owners, luxury travelers, and those looking for a premium hospitality experience that blends relaxation with upscale amenities. These destinations may have more seasonal demand but remain highly desirable for those looking for an elite retreat.

Key insights regarding each destination segment are summarized below and on the following pages.

YEAR-ROUND METROS *(Tampa/Sarasota, Fort Lauderdale, Miami, San Diego/La Jolla)*

The larger year-round metro destinations continue to expand their diverse offerings to the tourism market through investment in events, festivals, branding, placemaking and public assembly facilities. Key takeaways from these destinations are summarized below.

Luxury-Infused Experiences & Signature Events

Tourism destinations that effectively attract high-net-worth visitors do not rely solely on luxury accommodations but instead integrate premium hospitality with high-profile experiences and signature events. San Diego and La Jolla exemplify this strategy by leveraging major sporting and cultural events to enhance their destination appeal. The Lodge at Torrey Pines, a five-star resort, is strategically positioned alongside Torrey Pines Golf Course, which hosts the Farmers Insurance Open and has been a site for the U.S. Open, reinforcing the area's reputation as a premier golf destination. Additionally, San Diego's La Jolla Playhouse, a Tony Award-winning regional theater, attracts visitors seeking high-quality cultural experiences. These offerings, combined with San Diego's coastal location and outdoor recreation, create a well-rounded luxury tourism product.

Similarly, Fort Lauderdale and Miami have capitalized on signature events to reinforce their status as luxury-driven destinations. Miami, in particular, has positioned itself as a global hub for high-end cultural tourism, largely due to events such as Art Basel Miami Beach, which attracts an international audience of collectors, artists, and luxury travelers. Additionally, Miami's hospitality industry integrates exclusive experiences, from high-end waterfront dining in areas like Brickell Key to luxury shopping in the Miami Design District.

Homing In On Strong Brand Identities

In a competitive tourism landscape, destinations that establish a distinctive and well-defined identity are better positioned to attract visitors and differentiate themselves from comparable markets. Miami has effectively built a globally recognized brand by embracing its Latin influence, nightlife, and contemporary arts scene. Events such as Art Basel Miami Beach not only attract luxury travelers but also solidify Miami's reputation as an international hub for art and culture. Additionally, the Wynwood Arts District, with its extensive collection of large-scale street murals and creative spaces, has transformed into a key tourism draw that sets Miami apart from other beach destinations. These elements contribute to an identity that extends beyond the city's coastal assets, making it a multifaceted and highly competitive destination.

Fort Lauderdale, meanwhile, has invested in yachting and maritime events, such as the Fort Lauderdale International Boat Show, which caters to an elite clientele and reinforces its branding as the "Yachting Capital of the World." Sarasota, on the other hand, has reinforced its brand identity as "Florida's Cultural Coast" through its focus on arts and culture, with institutions such as the John and Mable Ringling Museum of Art and the Sarasota Opera enhancing its reputation as a sophisticated yet relaxed coastal destination.

Waterfront Activation

Maximizing the economic impact of waterfront assets requires a strategic approach to development that integrates public spaces, hospitality, and entertainment offerings. Tampa has successfully implemented a highly activated waterfront model through the Tampa Riverwalk, a 2.6-mile pedestrian corridor that connects key attractions such as the Tampa Museum of Art, the Florida Aquarium, and Sparkman Wharf. The riverwalk's design encourages both visitor engagement and extended stays by providing seamless access to cultural, dining, and recreational experiences. Additionally, the nearby Heights District has emerged as a vibrant mixed-use development, further enhancing Tampa's waterfront appeal through a blend of residential, retail, and entertainment venues.

Sarasota is undertaking a similar initiative with the redevelopment of The Bay, a 53-acre waterfront revitalization project designed to enhance public access, cultural programming, and recreational amenities. This project aims to create a dynamic space that seamlessly integrates Sarasota's downtown core with its waterfront assets. Fort Lauderdale has also recognized the value of an activated waterfront, with Las Olas Boulevard serving as a central corridor connecting the city's beach district with an array of luxury retail, dining, and entertainment options.

Convention Facility Investment

Meetings and conventions are a critical component of destination competitiveness, and sustained investment in convention infrastructure is essential for maintaining and expanding market share. Fort Lauderdale has made significant investments in this sector with the ongoing \$1.3 billion expansion of the Greater Fort Lauderdale/Broward County Convention Center. This project will expand the Center's Exhibit Hall to 350,000 square feet, as well as add a 65,000-square foot waterfront ballroom and an 800-room Omni hotel.

Tampa has also prioritized investment in its convention infrastructure to support the growth of business tourism. The Tampa Convention Center, which recently underwent a \$38 million renovation, now features upgraded meeting spaces, enhanced waterfront access, and new technology integrations. The City is now evaluating the feasibility of an expansion of the facility that could add up to 200,000 square feet of additional, contiguous exhibit space. Miami, with its well-established convention product, has been planning a new headquarters hotel that would be adjacent to the property and enable the destination to accommodate larger national conventions and tradeshow.

Key Takeaways for Palm Beach County

Palm Beach County can enhance its tourism appeal by integrating luxury with curated experiences, refining its brand identity, activating its waterfront assets, and investing in its convention infrastructure. Similar to how San Diego and Miami leverage signature events like Art Basel and the Farmers Insurance Open, Palm Beach could expand its event portfolio beyond events such as the Palm Beach International Boat Show to include high-profile fashion, culinary, or arts festivals. Strengthening golf and equestrian tourism through exclusive experiences and packaging, similar to San Diego's Torrey Pines model, could further elevate the county's luxury offerings.

Additionally, Palm Beach could refine its individualized identity to differentiate itself from other high-end coastal destinations. While its exclusivity is a core strength, expanding appeal to younger affluent travelers—through arts, design, and nightlife enhancements—could make it more dynamic, similar to how Miami has evolved beyond just a beach destination. Waterfront activation, inspired by Tampa's Riverwalk and Sarasota's Bay redevelopment, could enhance visitor engagement in select areas such as West Palm Beach or Delray Beach, while greater investment in expanding and improving the Palm Beach County Convention Center and surrounding district could diversify the tourism base and drive year-round economic impact.

MOMENTUM MARKETS *(Jacksonville / St. Augustine, Hilton Head, Naples)*

Growing tourism markets in Jacksonville/St. Augustine, Hilton Head, and Naples are tapping into emerging culinary scenes, yachting, ecotourism, and luxury automotive events to attract high-value visitor segments.

Elevated Dining and Culinary Tourism

Momentum markets can differentiate themselves by enhancing their culinary reputation through a combination of fine dining, local food culture, and signature culinary events. Jacksonville and St. Augustine, for example, have embraced their unique regional flavors, from fresh Atlantic seafood to historic influences in Spanish and Southern cuisine. St. Augustine's Food & Wine Festival has gained prominence, offering a curated experience that highlights regional chefs, fine wines, and locally sourced ingredients, reinforcing the area's status as a culinary destination. Jacksonville, meanwhile, has cultivated a strong craft beer scene with experiences like the Jax Ale Trail, which aligns with broader trends in experiential food tourism.

Similarly, Naples has solidified its reputation for fine dining, with high-end establishments such as The French Brasserie Rustique and Ocean Prime drawing visitors seeking an upscale gastronomic experience. The city also hosts the Naples Winter Wine Festival, one of the nation's premier charity wine auctions, which attracts affluent visitors and generates millions in tourism impact. Hilton Head complements its luxury leisure appeal with seafood-driven culinary experiences, such as the Hilton Head Island Seafood Festival, a multi-day event that integrates fine dining, cooking demonstrations, and waterfront settings to enhance the visitor experience.

Maritime & Yachting

Destinations with strong waterfront assets can maximize their appeal by enhancing access to yachting, sailing, and maritime tourism experiences. Hilton Head has long been recognized for its boating culture, with high-end marinas like Harbour Town Yacht Basin and Shelter Cove Harbour offering luxury amenities, charters, and waterfront dining. The area's sailing and boating excursions are integral to its tourism strategy, attracting both recreational boaters and those seeking premium experiences on the water. Additionally, annual events such as the Harbour Town Yacht Hop provide an opportunity for high-net-worth visitors to engage with luxury yachting in a social and experiential format.

Naples has also invested in its maritime sector, with destinations like Naples Bay Resort & Marina providing waterfront accommodations and direct access to boating activities. The city's appeal is enhanced by a network of private yacht clubs, luxury waterfront dining, and curated boating experiences, such as sunset cruises and sportfishing charters. Jacksonville and St. Augustine, while not traditionally known for yachting, have made strategic enhancements to their marina infrastructure to support increased boating tourism. St. Augustine, in particular, benefits from its status as the oldest continuously occupied city in the U.S., attracting maritime heritage enthusiasts. Its Municipal Marina serves as a key docking point for yachts and sailing vessels, providing direct access to the city's historic downtown.

Tying Ecotourism with Luxury

With the growing emphasis on sustainability in the travel industry, destinations that integrate eco-conscious luxury experiences can position themselves as attractive alternatives to more traditional high-end markets. Hilton Head has taken a proactive approach to sustainable tourism by maintaining its commitment to low-impact development, prioritizing environmental preservation, and promoting outdoor activities such as kayaking, birdwatching, and eco-tours. Luxury resorts like The Sea Pines Resort and Montage Palmetto Bluff offer upscale accommodations while emphasizing natural beauty, conservation, and wellness-focused experiences.

Naples has similarly embraced sustainable luxury, with resorts such as The Ritz-Carlton Naples, Tiburón incorporating eco-conscious design and amenities, including Audubon-certified golf courses and sustainability-driven wellness programs. Jacksonville and St. Augustine, while more urbanized, have leveraged their coastal environments to support nature-based tourism initiatives. St. Augustine's Anastasia State Park provides a prime example of how destinations can balance ecotourism with luxury, offering high-end accommodations nearby while maintaining pristine natural landscapes for outdoor recreation.

Luxury Automotive Events

Luxury automotive events serve as key tourism drivers for high-net-worth individuals, aligning well with markets that cater to affluent visitors. Hilton Head has established itself in this niche through the Hilton Head Island Concours d'Elegance & Motoring Festival, an annual event showcasing rare and collectible automobiles. This festival not only attracts classic car enthusiasts but also enhances Hilton Head's brand as an upscale destination with exclusive experiences.

Naples has followed a similar strategy with its Cars on Fifth Concours, a premier automotive event featuring luxury and exotic vehicles. Hosted along Fifth Avenue South, Naples' high-end shopping and dining district, the event aligns with the city's existing luxury retail and tourism ecosystem. St. Augustine also integrates automotive tourism with history, leveraging events such as the St. Augustine Cruisers Car Show, which blends classic car culture with the city's Spanish colonial heritage. These automotive events contribute to a destination's appeal by attracting affluent visitors, generating media coverage, and reinforcing a brand identity tied to exclusivity and lifestyle-oriented experiences.

Key Takeaways for Palm Beach County

Palm Beach County can enhance its tourism appeal by adopting strategies from Hilton Head, Naples, and Jacksonville/St. Augustine, focusing on experiential luxury, waterfront activation, and niche event programming. Expanding culinary tourism through a signature food and wine festival or curated chef-driven experiences could elevate Palm Beach's dining reputation, similar to Naples' Winter Wine Festival and St. Augustine's Food & Wine Festival. Additionally, while Palm Beach already has a strong yachting sector, it can further activate its waterfronts by integrating elite sailing regattas, luxury dockside events, and exclusive maritime experiences tailored for high-net-worth visitors. Enhancing eco-luxury offerings by promoting sustainable hospitality, private conservation-focused tours, and eco-conscious resort partnerships—as seen in Hilton Head and Naples—would also align the county with growing trends in responsible luxury travel.

Beyond waterfront and sustainability efforts, Palm Beach can further differentiate itself through high-end automotive tourism, leveraging events similar to Hilton Head's Concours d'Elegance and Naples' Cars on Fifth. Hosting an exclusive, multi-day luxury lifestyle festival that combines exotic car showcases, high-performance driving experiences, and elite social gatherings could reinforce the county's reputation as a premier destination for affluent travelers.

EXCLUSIVE GETAWAYS *(The Hamptons, Newport, Scottsdale, Santa Barbara)*

Prestigious tourism destinations such as The Hamptons, Santa Barbara, Scottsdale, and Newport continue to attract high-profile individuals by leveraging high-profile events, niche luxury experiences, cultural institutions, and historic charm.

High-Profile, Brand-Relevant Events

High-end destinations sustain their exclusivity by hosting prestigious events that attract affluent visitors, reinforce luxury branding, and generate media exposure. The Hamptons exemplifies this approach with a diverse lineup of elite events spanning fashion, automotive, and yachting industries. Hamptons Fashion Week serves as a premier platform for designers, models, and luxury brands, mirroring the prestige of New York Fashion Week while catering to the region's high-net-worth summer residents. Similarly, The Bridge, an invitation-only luxury automotive event held at the historic Bridgehampton Race Circuit, brings together rare collectible cars, luxury brands, and high-profile guests in an exclusive setting. These events, alongside the Hamptons International Film Festival, strengthen The Hamptons' reputation as a high-profile retreat for global influencers, creatives, and industry leaders.

Newport, a world-renowned sailing hub, capitalizes on its maritime prestige by hosting elite yacht regattas such as the Newport Bermuda Race and the Rolex New York Yacht Club Invitational Cup, attracting global sailing elites and affluent spectators. Meanwhile, Scottsdale's Barrett-Jackson Auto Auction remains a signature event for car collectors and high-net-worth enthusiasts, driving substantial luxury tourism spending. By curating these events, these destinations extend their appeal beyond seasonal leisure travel, creating year-round prestige that reinforces their standing in the luxury market.

Niche Events for High-Value Visitors

Niche events serve as powerful tools for luxury destinations to attract high-value visitors by catering to specific interests and cultural affinities. Unlike large-scale festivals, these events are often curated, intimate, and tailored to affluent audiences, offering exclusive access and unique experiences. The Newport Jazz Festival exemplifies this approach by blending world-class jazz performances with the historic and upscale setting of Newport, Rhode Island, attracting sophisticated music enthusiasts and leisure travelers. Similarly, the Santa Barbara International Film Festival not only brings Hollywood talent to the region but also appeals to cinephiles, industry professionals, and luxury travelers looking for an exclusive cultural experience. These events enhance a destination's brand by reinforcing its identity as a refined, experience-driven location rather than a mass-market tourism hub.

Scottsdale has successfully implemented this strategy through Canal Convergence, a public art and technology-driven event that integrates light-based installations, interactive exhibits, and a high-end creative atmosphere along the city's waterfront. This event appeals to affluent art collectors, designers, and luxury travelers, positioning Scottsdale as a leading destination for contemporary art and innovation. The Hamptons also thrives on this model, with smaller-scale events such as exclusive gallery openings, wine tastings, and equestrian competitions, all of which align with the area's elite visitor demographic.

Cultural Prestige and The Arts

Cultural prestige plays a pivotal role in reinforcing a destination's luxury appeal, attracting affluent travelers who seek exclusive artistic and intellectual experiences. The Hamptons Fine Art Fair exemplifies this by offering collectors and connoisseurs access to blue-chip galleries, contemporary masterpieces, and exclusive networking events in a setting that aligns with the region's sophisticated reputation. Beyond formal art fairs, The Hamptons' high-end gallery scene and private art auctions further enhance its status as a seasonal hub for art collectors. Similarly, Santa Barbara's Funk Zone has transformed into a premier arts district, blending contemporary galleries, artisan studios, and cultural spaces with a high-end wine and culinary scene, creating an immersive experience that appeals to high-net-worth visitors interested in both fine art and lifestyle.

Scottsdale takes a different but equally effective approach by integrating public art, immersive installations, and cultural festivals into its luxury tourism ecosystem. The city's Scottsdale Museum of Contemporary Art (SMoCA) and its renowned ArtWalk cement its reputation as a top-tier arts destination.

Meanwhile, Newport, Rhode Island, enhances its historic appeal through classical music performances, Gilded Age mansion exhibits, and cultural programming that blends heritage with artistic refinement.

Leveraging History

Leveraging history allows luxury destinations to preserve their cultural heritage while adapting to the expectations of high-end travelers. Newport, Rhode Island, exemplifies this strategy through its Concours d'Elegance, which transforms the city's Gilded Age estates into a backdrop for a premier collector car event. The region's historic mansions, including The Breakers and Marble House, have been reimagined as venues for private events, art exhibits, and exclusive galas, blending 19th-century grandeur with contemporary luxury experiences. Similarly, The Hamptons integrates its historic charm with modern prestige through institutions like the Parrish Art Museum, which preserves the legacy of East End artists while showcasing contemporary collections in a sleek, modern architectural setting. Santa Barbara also balances heritage preservation with luxury appeal, particularly through venues like The Riviera Mansion, a historic estate that now serves as an upscale event space, hosting private gatherings, weddings, and cultural programming.

Key Takeaways for Palm Beach County

Palm Beach County can enhance its luxury tourism appeal by adopting strategies from exclusive getaway destinations like The Hamptons, Santa Barbara, Scottsdale, and Newport, which successfully attract high-net-worth visitors through curated events, cultural prestige, and historic preservation. Hosting high-profile, brand-relevant events that align with Palm Beach's identity—such as exclusive fashion showcases, yachting competitions, and collector car gatherings—could elevate its reputation and extend tourism beyond seasonal demand. The Hamptons has effectively used Hamptons Fashion Week, The Bridge automotive event, and the Hamptons International Film Festival to reinforce its status as a cultural and social hub, while Newport's yacht regattas and Scottsdale's Barrett-Jackson Auto Auction create strong brand associations that drive luxury spending. Palm Beach can expand on existing events like the Palm Beach International Boat Show by introducing more invite-only and lifestyle-driven experiences that cater to global influencers, collectors, and ultra-high-net-worth individuals.

Additionally, Palm Beach could further differentiate itself by investing in niche cultural and historic tourism, taking inspiration from destinations that have modernized their heritage to appeal to luxury travelers. The Newport Jazz Festival, Santa Barbara International Film Festival, and Scottsdale's Canal Convergence have successfully positioned these markets as sophisticated, arts-driven destinations. Palm Beach could strengthen its arts scene through elite gallery events, immersive public art installations, and exclusive musical performances set against its historic estates and waterfront. Similarly, leveraging its architectural heritage—much like Newport's Gilded Age mansions and Santa Barbara's Riviera Mansion—by transforming historic sites into luxury experiences could create a unique blend of exclusivity, culture, and history.

VISITOR PREFERENCE ANALYSIS

To further benchmark the Palm Beach County destination with its domestic peers, CSL conducted a Visitor Preference Analysis. This exercise involves a simulated choice that visitors from 14 high-value visitor segments might make to visit and/or live in either Palm Beach County or one of its peer/comparable destinations. This exercise was undertaken for each of the 20 benchmark destinations, and the “wins” and “losses” were tallied to generate insights regarding how each caters to different market profiles, and to form preliminary ideas as to how PBC could better compete for various high-value visitor segments.

A summary of these market segments is show in the below table. Note that these segments are sourced from Experian’s Mosaic USA, a consumer lifestyle segmentation system that categorizes U.S. households into 19 groups and 71 types based on factors like lifestyle, interests, geography, and financial status, using 300 data attributes to provide a holistic, data-driven view of consumer behavior. The 14 groups shown below were identified as “primary target segments” within the TMP Destination Branding, Marketing and Messaging Assessment (provided under separate cover).

EXPERIAN'S MOSAIC USA – TOP 14 “HIGH-VALUE” MARKET SEGMENTS

TARGET TRAVELER SEGMENT		HEAD OF HOUSEHOLD AGE	AGE OF CHILDREN	HOUSEHOLD SIZE (PERSONS)	HOUSEHOLD INCOME (\$)
POWER ELITE	American Royalty	51-65	13-18	5+	\$250,000+
	Platinum Prosperity	51-65	0-3	5+	\$250,000+
	Kids and Cabernet	36-45	10-12	2	\$250,000+
	Picture Perfect Families	46-50	13-18	3	\$250,000+
	Couples with Clout	36-45	13-18	2	\$250,000+
	Jet Set Urbanites	51-65	13-18	1	\$250,000+
FLOURISHING FAMILIES	Across the Ages	51-65	13-18	5+	\$125,000-\$149,999
	Babies and Bliss	36-45	10-12	2	\$125,000-\$149,999
	Family Fun-Tastic	36-45	0-3	2	\$125,000-\$149,999
	Cosmopolitan Achievers	36-45	13-18	2	\$125,000-\$149,999
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	51-65	0-3	3	\$175,000-\$199,999
	Golf Carts and Gourmets	76+	0-3	2	\$250,000+
	Philanthropic Sophisticates	66-75	13-18	2	\$100,000-\$124,999
	Boomers and Boomerangs	51-65	0-3	5+	\$75,000-\$99,999

Brief descriptions for each of these market profiles follow.

POWER ELITE

- **American Royalty:** Affluent, influential, and successful couples and families residing in prestigious suburbs.
- **Platinum Prosperity:** Wealthy, established empty nesters living in lavish suburban homes.
- **Kids and Cabernet:** Prosperous, middle-aged married couples leading child-focused lives in affluent suburbs.
- **Picture Perfect Families:** Established families on the go, residing in wealthy suburban neighborhoods.
- **Couples with Clout:** Highly educated, mobile couples enjoying affluent lifestyles in upscale neighborhoods.
- **Jet Set Urbanites:** Upscale singles and couples leading fashionable, high-rise city lives.

FLOURISHING FAMILIES

- **Across the Ages:** Flourishing couples and multi-generational families experiencing diverse lifestyles in suburban areas.
- **Babies and Bliss:** Middle-aged couples with large families leading active lives in affluent suburban settings.
- **Family Fun-tastic:** Upscale, middle-aged families with older children engaged in busy, kid-centered activities in satellite cities.
- **Cosmopolitan Achievers:** Affluent, middle-aged couples and families enjoying dynamic lifestyles in metropolitan regions.

BOOMING WITH CONFIDENCE

- **Sophisticated City Dwellers:** Wealthy, boomer-aged couples residing in urban and close-in suburban areas.
- **Golf Carts and Gourmets:** Thriving retirees and empty-nesters living comfortably in amenity-rich communities.
- **Philanthropic Sophisticates:** Mature, upscale couples and singles residing in suburban homes.
- **Boomers and Boomerangs:** Baby boomer adults sharing suburban homes with their teenage and young adult children.

The analysis of each segment's preference between Palm Beach County and the 20 destinations as places to visit and live is summarized below.

VISITOR PREFERENCE ANALYSIS: PALM BEACH COUNTY VS. DOMESTIC DESTINATIONS

The table below summarizes where each of the 14 high-value market segments would prefer to visit. Green indicates “wins” by Palm Beach County, while pink represents “losses”.

VISITATION PREFERENCE – PALM BEACH COUNTY VS. DOMESTIC DESTINATIONS													
TARGET TRAVELER SEGMENT		YEAR-ROUND METROS				MOMENTUM MARKETS			EXCLUSIVE GETAWAYS				PALM BEACH WINS (OUT OF 11)
		SAN DIEGO + LA JOLLA	MIAMI	TAMPA + SARASOTA	FT. LAUDERDALE	JACKSONVILLE + ST. AUGUSTINE	HILTON HEAD ISLAND	NAPLES	THE HAMPTONS	SANTA BARBARA	SCOTTSDALE	NEWPORT	
POWER ELITE	American Royalty												6
	Platinum Prosperity												9
	Kids and Cabernet												7
	Picture Perfect Families												7
	Couples with Clout												6
	Jet Set Urbanites												7
FLOURISHING FAMILIES	Across the Ages												2
	Babies and Bliss												8
	Family Fun-Tastic												8
	Cosmopolitan Achievers												4
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers												7
	Golf Carts and Gourmets												11
	Philanthropic Sophisticates												8
	Boomers and Boomerangs												9
PALM BEACH WINS (OUT OF 14)		9	8	9	13	10	9	7	7	8	9	10	

Visitor segment prefers PBC
 Visitor segment prefers other destination

Palm Beach County performs well in the luxury travel market, winning 64% of matchups (99 out of 154) against comparable destinations. It is particularly competitive among the Booming with Confidence and Flourishing Families segments, consistently ranking well against Exclusive Getaway destinations like Newport (10 wins) and Scottsdale (9 wins). The County's appeal is strongest among affluent retirees, empty nesters, and established families who prioritize high-end leisure, wellness, and exclusive lifestyle experiences. However, Palm Beach's performance among Power Elite travelers is more variable, with wins ranging from 6 (American Royalty) to 9 (Platinum Prosperity), suggesting opportunities to further enhance its prestige positioning through invite-only events, luxury brand collaborations, and expanded private aviation and yachting offerings.

Despite its strengths, Palm Beach faces challenges in capturing certain traveler segments, particularly Across the Ages and Cosmopolitan Achievers, two of its biggest “lost” customer types. These groups, often seeking vibrant, multi-generational experiences or more diverse urban luxury, may be drawn to larger markets like Miami or San Diego, which offer broader pricing options and family-oriented attractions. These results suggest that Palm Beach cannot be everything to everyone, and its strategy should focus on deepening its luxury appeal rather than competing with larger destinations that cater to larger families seeking more mid-point pricing.

A similar breakdown of where each segment would likely choose to live is summarized below.

LIVABILITY PREFERENCE – PALM BEACH COUNTY VS. DOMESTIC DESTINATIONS










TARGET TRAVELER SEGMENT	YEAR-ROUND METROS				MOMENTUM MARKETS			EXCLUSIVE GETAWAYS				PALM BEACH WINS (OUT OF 11)
	SAN DIEGO + LA JOLLA	MIAMI	TAMPA + SARASOTA	FT. LAUDERDALE	JACKSONVILLE + ST. AUGUSTINE	HILTON HEAD ISLAND	NAPLES	THE HAMPTONS	SANTA BARBARA	SCOTTSDALE	NEWPORT	
POWER ELITE	American Royalty											9
	Platinum Prosperity											11
	Kids and Cabernet											11
	Picture Perfect Families											11
	Couples with Clout											11
	Jet Set Urbanites											9
FLOURISHING FAMILIES	Across the Ages											8
	Babies and Bliss											8
	Family Fun-Tastic											8
	Cosmopolitan Achievers											4
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers											4
	Golf Carts and Gourmets											11
	Philanthropic Sophisticates											9
	Boomers and Boomerangs											9
PALM BEACH WINS (OUT OF 14)		11	11	11	13	9	14	13	10	12	11	8

	Demographic segment prefers PBC
	Demographic segment prefers other destination

In this analysis, Palm Beach County emerges as a top-tier residential destination, winning 80% of matchups (123 out of 154) against the selected markets, reinforcing its strong reputation as a second-home destination for affluent individuals. The County’s appeal is rooted in its prestige, climate, and luxury lifestyle offerings, making it a preferred choice for high-net-worth individuals seeking seasonal or retirement properties. While Palm Beach has successfully positioned itself as a place where the wealthy want to live, the next strategic step should be to attract more high-value first-time visitors who may transition into future residents. To do so, Palm Beach could cultivate exclusive, high-impact experiences that resonate with younger, affluent travelers—those who may not yet consider Palm Beach a primary destination but could develop long-term loyalty. Prioritizing unique, invitation-only events, experiential luxury, and high-profile social activations will be key to broadening its appeal beyond traditional buyers and fostering a new generation of elite residents.

STORY AND STRATEGY ANALYSIS: GLOBAL MARKETS

The nine global destinations selected for this analysis have also been segmented into three categories, as listed below.

GLOBAL MARKET CASE STUDIES				
ULTRA LUXURY	High-net-worth appeal, ultra-luxury real estate, and exclusive social status	 MONACO	 ST. BARTS	 ABU DHABI
HIGH-END RESORT & LIFESTYLE	Wealthy vacationers, luxury lifestyle tourism, and exclusive but accessible experience	 MARBELLA	 THE ALGARVE	 GOLD COAST
ACCESSIBLE CARIBBEAN	Luxury mix with a broader tourism mix, appealing to both high-net-worth visitors and general affluent travelers	 SAN JUAN	 NASSAU	 BERMUDA

Destinations in the **Ultra Luxury** category, such as Monaco, St. Barts, and Abu Dhabi, cater primarily to ultra-high-net-worth individuals seeking prestige, privacy, and elite social status. These locations are defined by high barriers to entry, including multi-million-dollar real estate, private clubs, and VIP-only experiences that reinforce their exclusivity. Luxury in these destinations extends beyond hospitality—it is embedded in the lifestyle, from superyacht culture and luxury shopping to private aviation and elite events. The high cost of entry ensures that these destinations remain status symbols for the world's wealthiest travelers.

High-End Resort & Lifestyle markets like Marbella, The Algarve, and Australia's Gold Coast represent a luxury lifestyle appeal that remains exclusive yet more accessible than Ultra Luxury destinations. These locations attract affluent travelers, second-home buyers, and high-end vacationers who seek premium leisure experiences, five-star accommodations, and upscale entertainment. While still catering to wealthy individuals, these destinations balance exclusivity with high-end tourism infrastructure, including luxury resorts, golf courses, and yachting communities. They appeal to those who want refined experiences without the extreme exclusivity of Ultra Luxury locales.

Accessible Caribbean destinations such as San Juan, Nassau, and Bermuda offer a blend of luxury and broader tourism accessibility, making them attractive to both high-net-worth travelers and generally affluent visitors. While premium offerings such as five-star resorts, private villas, and high-end shopping exist, these markets also feature commercial tourism, large-scale cruise activity, and diverse price points, making them more approachable than Ultra Luxury or High-End Resort destinations. Their appeal lies in natural beauty, cultural heritage, and a mix of premium and mid-tier experiences, making them ideal for travelers who desire luxury but with more flexibility in accessibility and affordability.

Key insights regarding each destination are summarized below and on the following pages.

ULTRA LUXURY *(St. Barts, Abu Dhabi, Monaco)*

These well-established international getaways for the most affluent visitors continue to invest in premium and exclusive experiences, high-end experiential dining, sustainable tourism, and signature events and festivals to drive high-value visitation and significant economic impact for their stakeholders.

Luxury-Infused Experiences & Signature Events

Ultra-luxury destinations differentiate themselves through high barriers to entry, private experiences, and an elite social fabric that ensure they remain havens for the world's most affluent travelers. Monaco exemplifies this model, where access to the Monte Carlo Casino is restricted to non-residents, reinforcing its appeal as a selective playground for visiting high rollers. The principality's private members' clubs, superyacht berths in Port Hercules, and ultra-exclusive real estate market further enhance its status as a destination reserved for the global elite. Similarly, Abu Dhabi's Emirates Palace Mandarin Oriental, with its gold-adorned interiors and invitation-only VIP services, offers a level of opulence designed specifically for royalty, dignitaries, and ultra-high-net-worth individuals. The city also boasts private desert retreats, ultra-exclusive golf courses, and curated cultural experiences, such as private viewings at the Louvre Abu Dhabi, ensuring that exclusivity is woven into every aspect of the destination.

St. Barts, on the other hand, takes a more passive approach to exclusivity thanks to its remote location, attracting billionaires and celebrities seeking discreet luxury. The island's villa rental market surpasses traditional five-star hotels in desirability, with properties like Villa Rockstar at Eden Rock offering personal butlers, private chefs, and direct beach access away from public crowds. The island's small airport, which can only accommodate private jets and small regional aircraft, naturally limits mass tourism while maintaining its appeal for those flying in from St. Maarten, San Juan, or direct from the U.S. East Coast. Meanwhile, events like the St. Barts Bucket Regatta reinforce the island's invitation-only social scene, where the world's top yacht owners compete in an atmosphere of ultra-luxury camaraderie.

Each of the Ultra Luxury destinations also offer private shopping experiences where elite clientele can enjoy appointment-only access, after-hours boutique visits, and personalized styling services in exclusive settings such as luxury villas, superyachts, and private lounges.

Culinary & Experiential Dining Evolving Identity

Ultra-luxury destinations are redefining fine dining by blending high-end gastronomy with immersive, multi-sensory experiences, trend-forward concepts, and exclusive culinary events. Monaco, for instance, has seen a surge in Michelin-starred restaurants and experiential dining concepts, reinforcing its status as a premier gastronomic hub. Recently, La Table d'Antonio Salvatore at Rampoldi became the first Michelin Green Star restaurant in Monaco, merging sustainable haute cuisine with opulent, intimate dining. Meanwhile, Les Ambassadeurs by Christophe Cussac at Hôtel Métropole brings a theatrical element to fine dining, where guests experience a chef-driven journey of flavors, textures, and artistic plating.

Beyond individual restaurants, Monaco's Festival des Étoilés Monte-Carlo has become a flagship event, bringing together internationally renowned chefs for exclusive, limited-seat tasting experiences that elevate the city's reputation as a global culinary leader. Additionally, Amazonico Monaco, a jungle-themed hotspot that blends Latin American cuisine with a lively, music-driven atmosphere, and Buddha-Bar Monte-Carlo, known for its fusion of Asian flavors, extravagant décor, and vibrant DJ sets, are redefining the fine dining experience by merging elite gastronomy with high-energy nightlife.

Abu Dhabi, always at the forefront of innovation and exclusivity, has embraced immersive, high-tech dining experiences that merge gastronomy with art, technology, and entertainment. CLAP Abu Dhabi, a contemporary Japanese concept, seamlessly integrates live DJ performances, avant-garde design, and a multi-sensory atmosphere where the restaurant transforms into an energetic lounge as the night progresses. Meanwhile, Hakkasan Abu Dhabi, located within the Emirates Palace, delivers a high-end Cantonese experience blended with curated lighting, moody aesthetics, and private dining rooms tailored for VIP guests. One of the most groundbreaking additions to the city's culinary scene is Sublimotion at the Mandarin Oriental, a futuristic, multi-course experience originally from Ibiza that uses projection mapping, AI-enhanced visuals, and synchronized music to immerse diners in an interactive, ever-changing environment. These ultra-luxury destinations are proving that fine dining is no longer just about food—it's about curated, one-of-a-kind experiences that blend exclusivity, innovation, and entertainment to captivate a high-net-worth clientele.

Eco-Luxury as a Growing Priority

Ultra-luxury destinations are increasingly integrating sustainability with exclusivity, offering eco-conscious travelers high-end experiences that align with environmental responsibility. In Abu Dhabi, desert excursions and eco-glamping have become standout offerings, allowing guests to immerse themselves in the natural landscape without sacrificing luxury. The Pura Eco Retreat on Jubail Island provides an off-grid, low-impact experience with solar-powered villas, locally sourced gourmet dining, and immersive wellness programming such as sunrise yoga amid the dunes. Meanwhile, bespoke desert safaris with luxury tour operators feature private, conservation-focused excursions, falconry demonstrations, and overnight stays in Bedouin-inspired tents with five-star hospitality. These experiences cater to affluent travelers who seek adventure and cultural authenticity while maintaining a commitment to sustainability.

Coastal destinations like Monaco and St. Barts are similarly prioritizing eco-luxury through sustainable wellness retreats and conservation initiatives. Monaco's sustainability push is led by the Prince Albert II Foundation, which has launched long-term efforts to reduce carbon emissions, expand marine conservation, and promote green energy solutions across the principality. The ultra-luxury Monte-Carlo Beach Hotel has been a leader in sustainable hospitality, achieving Green Globe certification and implementing zero-waste initiatives while maintaining its reputation as an elite retreat. In St. Barts, the Cheval Blanc Isle de France offers oceanfront wellness retreats that incorporate holistic spa treatments, organic dining, and eco-conscious architecture, blending high-end relaxation with environmental responsibility.

Signature Events Drive Global Prestige

Signature events play a critical role in reinforcing a destination's elite status, attracting global high-net-worth individuals, industry leaders, and luxury brands. Monaco exemplifies this with a calendar of world-class events, but it is not alone in leveraging exclusive gatherings to maintain its ultra-luxury appeal. The Monaco Grand Prix remains one of the most prestigious Formula 1 races globally, transforming the principality into a spectacle of superyachts, celebrity parties, and high-stakes networking. Similarly, Abu Dhabi has cemented its motorsport prestige with the Abu Dhabi Grand Prix at Yas Marina Circuit, an F1 event known for its extravagant VIP experiences, luxury yacht hospitality, and after-race concerts featuring global superstars. In addition, the Abu Dhabi Art Fair has emerged as a premier cultural event, bringing together renowned international galleries, collectors, and high-net-worth patrons, reinforcing the city's growing reputation as an arts and investment hub for the ultra-affluent.

Beyond motorsports and art, gastronomy-focused events have become key elements of ultra-luxury brand positioning. The Gourmet Festival in St. Barts is a culinary spectacle where Michelin-starred chefs curate intimate, high-end dining experiences at the island's most luxurious resorts and private villas, reinforcing St. Barts' reputation as a top-tier culinary destination. Meanwhile, Monaco's Monte-Carlo Gastronomy Festival and the annual Festival des Étoilés Monte-Carlo bring together Michelin-starred chefs for exclusive tasting experiences and culinary excellence showcases, cementing Monaco's role as a fine dining capital. These events are not just about luxury consumption; they are status symbols that reinforce a destination's exclusivity, making them essential components of any ultra-luxury brand strategy.

Key Takeaways for Palm Beach County

Palm Beach County can elevate its positioning in the ultra-luxury market by adopting strategies from destinations like Monaco, St. Barts, and Abu Dhabi, which have mastered the art of exclusivity across luxury experiences, experiential dining, eco-luxury, and signature events. These destinations have reinforced their appeal to ultra-high-net-worth individuals by ensuring that exclusivity is not just about price—it's about access, privacy, and curated prestige-driven offerings. In Monaco and St. Barts, luxury is infused into everyday experiences, from invitation-only social clubs to private shopping appointments at designer boutiques. Similarly, Abu Dhabi has positioned itself as a leader in personalized luxury travel, offering high-end desert excursions, VIP-only cultural experiences, and hyper-personalized hospitality. Palm Beach County, already an elite destination, could further refine its private, ultra-personalized experiences to increase appeal to younger, globally mobile ultra-wealthy travelers seeking discreet but exclusive lifestyle offerings.

Another key takeaway is how these destinations leverage dining, sustainability, and signature events to reinforce their global prestige. Abu Dhabi's high-tech dining experiences, such as Sublimotion, set a new standard for luxury gastronomy, while Monaco and St. Barts have successfully blended Michelin-starred cuisine with immersive, experiential dining concepts. Palm Beach could similarly enhance its high-end culinary reputation by fostering chef-driven, interactive dining experiences that merge luxury with exclusivity. Meanwhile, the emphasis on eco-luxury in Monaco and St. Barts, through sustainable hotels, conservation programs, and wellness retreats, reflects a growing demand for responsible yet opulent travel. Finally, signature events remain a key differentiator—whether it's the Monaco Grand Prix, Abu Dhabi Grand Prix, or the St. Barts Gourmet Festival, these destinations draw global elites through exclusive, must-attend experiences. Palm Beach has an opportunity to curate and elevate its own signature events, ensuring they cater to affluent, experience-driven travelers while reinforcing its status as a world-class ultra-luxury destination.

HIGH-END RESORT & LIFESTYLE *(Marbella, The Algarve, Gold Coast)*

The High-End Resort & Lifestyle destinations have been investing in large-scale festivals, urban and cultural assets to mitigate overcrowding at their beaches, signature waterfront districts, and engaging outdoor adventure product.

Massive Festivals

Marbella, The Algarve, and Gold Coast each tend to host larger, more mainstream festivals than their Ultra Luxury counterparts. Marbella's Starlite Festival exemplifies this approach, transforming a former quarry into a month-long celebration of music and culture. The festival attracts international artists and celebrities, offering attendees a blend of concerts, gastronomy, and exclusive experiences. Similarly, the Algarve International Music Festival in Portugal showcases classical performances across various venues, drawing enthusiasts from around the globe. Australia's Gold Coast 600, part of the Supercars Championship, combines high-speed racing with live music and entertainment, turning the city into a vibrant hub of activity. These events not only draw visitors but also position the destinations as cultural epicenters.

Beyond these examples, the Algarve hosts the Noitada Portimão, a two-day festival featuring concerts, laser shows, silent discos, and video mapping across 15 different zones and four main stages, celebrating arts and culture. Marbella's La Noche de San Juan marks the beginning of the summer solstice with beach bonfires and traditional rituals, attracting both locals and tourists to its vibrant festivities. The Gold Coast's Bleach Festival showcases contemporary arts and culture, with events spanning music, dance, theater, and visual arts, reflecting the region's dynamic creative scene.

Diversifying from Beach Brands

High-end resort destinations like The Algarve and Marbella are actively diversifying beyond their traditional beach appeal by investing in cultural, culinary, and retail experiences, while also implementing strategies to mitigate congestion and enhance visitor flow. The Algarve has positioned itself as a wine tourism destination, with estates like Quinta dos Vales offering immersive vineyard experiences, while also promoting historic urban centers such as Faro and Loulé, where visitors can explore walkable districts, traditional markets, and cultural festivals away from the crowded coast. Similarly, Marbella has expanded its identity through a thriving art scene, high-end shopping at Puerto Banús, and authentic cultural experiences like flamenco performances.

Beyond cultural and retail investments, both destinations are developing pedestrian-friendly districts and enhancing visitor mobility to disperse tourism and alleviate congestion. In Marbella, areas like the city center and Guadalmina Baja offer low-traffic, walkable environments that blend Andalusian charm with modern luxury. The Algarve's urban hubs, such as Faro's Old Town, provide a mix of history, boutique shopping, and local dining, drawing tourists away from high-density beach zones. Additionally, initiatives like the HOTA cultural precinct in the Gold Coast and Pacific Fair Shopping Centre serve as models for how destinations can balance tourism expansion with sustainable urban planning. By promoting alternative visitor experiences beyond their coastal assets, these destinations are not only reducing strain on beachfront areas but also elevating their positioning as dynamic, well-rounded luxury travel destinations.

Signature Waterfront Districts

Investing in dynamic waterfront districts has become a key strategy for high-end resort destinations looking to enhance their global appeal and visitor experience. These developments integrate luxury retail, fine dining, entertainment, and marina access to create vibrant social and commercial hubs. The Gold Coast's Marina Mirage exemplifies this approach, seamlessly blending high-end shopping, waterfront dining, and leisure activities within an exclusive marina setting. Similarly, Vilamoura Marina in the Algarve, one of Portugal's largest, has positioned itself as a premier lifestyle destination, surrounded by five-star hotels, gourmet restaurants, and boutique shopping. Meanwhile, Marbella's Puerto Banús is a flagship example of a high-end waterfront district, renowned for its superyacht culture, designer storefronts, and elite social scene.

Beyond core marina infrastructure, destinations are further activating their waterfronts by expanding amenities and diversifying experiences to cater to both luxury travelers and lifestyle-driven visitors. Albufeira Marina in the Algarve offers a broad mix of boating, waterfront entertainment, and upscale dining, contributing to a diversified coastal economy beyond sun and sand tourism. In Marbella, the Golden Mile stretches along the coastline, featuring luxury resorts, Michelin-starred restaurants, and designer boutiques, reinforcing the city's position as an elite leisure destination. Meanwhile, the Gold Coast's Surfers Paradise takes a slightly different approach, balancing beachfront access with a dynamic urban core that offers high-end retail, entertainment, and nightlife.

Investing in Outdoor Adventure

To attract affluent, active travelers, high-end resort destinations are expanding their outdoor adventure offerings, integrating nature, sustainability, and luxury experiences into their tourism portfolios. The Gold Coast, traditionally known for its beaches, has diversified its outdoor appeal with the Wonder Reef, an artificial reef designed for both conservation and high-end diving experiences, drawing scuba divers seeking a premium underwater adventure. Similarly, the Algarve's Via Algarviana, a long-distance walking and cycling route stretching through the region's inland landscapes, offers a luxury eco-tourism experience by guiding visitors through vineyards, historic villages, and nature preserves. These initiatives help destinations extend visitor stays by offering premium outdoor experiences beyond the coastline.

Marbella has further strengthened its position as a hub for outdoor adventure, leveraging its proximity to mountain ranges, nature reserves, and protected coastal landscapes to attract active, high-spending visitors. The Artola Dunes, a protected area near Cabopino Beach, provides a scenic and sustainable outdoor attraction, offering eco-friendly boardwalks and wildlife viewing opportunities. Additionally, Marbella's Sierra Blanca mountains serve as a gateway to guided hiking, canyoning, and off-road biking tours, positioning the city as a starting point for outdoor excursions into Andalusia's rugged landscapes.

Key Takeaways for Palm Beach County

Palm Beach County can strengthen its competitive positioning by adopting strategic diversification efforts similar to those implemented in Marbella, The Algarve, and the Gold Coast. These destinations have successfully expanded their appeal beyond beaches by leveraging high-profile festivals, enhancing walkable urban districts, and investing in cultural assets to mitigate congestion and drive year-round tourism. Events like Marbella's Starlite Festival and the Gold Coast's Bleach Festival demonstrate how destination-branded cultural experiences can attract high-value visitors while reinforcing a luxury identity. Palm Beach could benefit from curating signature, upscale festivals in music, art, or motorsports to enhance visitor engagement beyond seasonal beach tourism. Additionally, investments in pedestrian-friendly luxury districts, boutique shopping corridors, and historic preservation efforts, as seen in Faro and Loulé, could help distribute visitor activity more evenly while maintaining the county's exclusive atmosphere.

Further, developing dynamic waterfront districts could help elevate Palm Beach's appeal to a broader slice of the world's luxury market. Destinations like Vilamoura Marina in the Algarve and Puerto Banús in Marbella have created integrated waterfront experiences that blend superyacht access, high-end retail, fine dining, and entertainment, positioning them as year-round lifestyle hubs. Palm Beach could enhance its own marina infrastructure and luxury waterfront offerings to strengthen its standing as a premier yachting destination. Additionally, leading high-end resort markets are increasingly catering to affluent, active travelers by investing in eco-luxury and outdoor adventure products. The Wonder Reef in the Gold Coast and the Via Algarviana in Portugal exemplify how destinations can integrate sustainability, wellness, and active tourism into their luxury brand. Palm Beach has the opportunity to further differentiate itself by enhancing its high-end eco-tourism, outdoor recreation, and nature-based wellness experiences, ensuring it remains a compelling choice for discerning travelers seeking both relaxation and active lifestyle amenities.

ACCESSIBLE CARIBBEAN *(San Juan, Nassau, Bermuda)*

The more broadly appealing Accessible Caribbean destinations are each increasingly invested in culinary and cultural storytelling to uniquely promote their histories, while also enhancing their water-based tourism assets and entertainment districts.

Investing in Cultural and Culinary Storytelling

The Accessible Caribbean destinations are increasingly leveraging cultural and culinary storytelling to differentiate their offerings, create immersive visitor experiences, and reinforce their authenticity. Nassau's Junkanoo Festival continues to evolve as a premier cultural event, blending Afro-Caribbean heritage, music, dance, and costume artistry into an electrifying celebration that drives both local pride and international tourism. Similarly, San Juan has positioned itself as a culinary and agritourism hub, where farm-to-table dining, rum distillery experiences, and gourmet food festivals highlight Puerto Rico's unique gastronomic heritage. Events like the Saborea Puerto Rico Festival showcase locally sourced ingredients, traditional cooking techniques, and modern culinary innovations, drawing both epicurean travelers and industry professionals. These initiatives not only enhance the visitor experience but also strengthen local economies by elevating small producers, artisans, and culinary entrepreneurs.

Beyond festivals, integrating cultural narratives into daily visitor experiences has been a key strategy for emerging high-end Caribbean destinations. In Bermuda, heritage trails have been expanding to emphasize the island's Afro-Caribbean legacy, maritime history, and architectural preservation efforts, offering travelers a more meaningful connection to the destination. The evolution of Bermuda's cultural tourism also includes experiences like curated Afro-Caribbean heritage tours, storytelling-based walking excursions, and culinary programs that blend traditional Bermudian flavors with contemporary global influences. Meanwhile, San Juan has taken a hybrid approach, bridging convention tourism with immersive local experiences, ensuring that business travelers extend their stay and engage with the city's historic, artistic, and culinary offerings.

Capitalizing on Water-Based Tourism

Caribbean destinations are increasingly growing and diversifying their water-based tourism product, offering yachting, island-hopping, and immersive ocean experiences to attract high-net-worth travelers. Nassau has positioned itself as a premier hub for private yacht charters and island-hopping experiences, offering exclusive excursions to the Exumas, Eleuthera, and other remote Bahamian cays. These experiences provide bespoke, high-touch service, privacy, and direct access to untouched natural beauty, aligning with the preferences of ultra-luxury travelers. Meanwhile, San Juan has expanded its portfolio of water-based excursions, offering luxury catamaran cruises, deep-sea fishing charters, and eco-focused mangrove tours that enhance the visitor experience beyond the urban core.

Beyond individual excursions, collaborative marketing and infrastructure development are driving luxury maritime tourism growth. Bermuda's partnership with Fort Lauderdale on the "Where The Yachts Go" campaign highlights how strategic alliances can enhance a destination's appeal to the global yachting elite, positioning Bermuda as a must-visit waypoint along key Atlantic sailing routes. Similarly, San Juan's increasing investment in high-end marina services and water-based excursions aims to expand its market share in the Caribbean's luxury boating sector.

Entertainment District Development

San Juan and Nassau are both increasingly focusing on integrated entertainment districts that serve as multi-use hubs for nightlife, cultural experiences, and high-end hospitality. San Juan's Distrito T-Mobile, located adjacent to the Puerto Rico Convention Center, has positioned itself as one of the world's leading convention and entertainment districts. Featuring venues such as the Coca-Cola Music Hall, Caribbean Cinemas VIP, and Arena Medalla, the district offers state-of-the-art live performances, high-end cinematic experiences, and local craft beer destinations, all within a walkable, high-energy environment. With upscale restaurants like Lupe Reyes and La Central, Distrito T-Mobile ensures that both leisure and convention visitors have access to premium entertainment, dining, and nightlife in a single, world-class destination. This integration strengthens San Juan's ability to attract major conventions, corporate events, and international entertainment acts.

The newly redeveloped Nassau Cruise Port now features a Junkanoo Museum, celebrating Bahamian culture; an amphitheater designed for concerts and events; over 60 retail spaces showcasing luxury and locally crafted goods; and expansive public spaces capable of hosting cultural festivals. Additionally, massive LED panels throughout the port display vibrant art, marine life visuals, and advertisements, creating a dynamic and engaging atmosphere for visitors. Beyond the Port, Atlantis Paradise Island continues to expand its all-inclusive resort offerings, providing guests with on-site access to live performances, immersive nightlife, and experiential culinary events.

Key Takeaways for Palm Beach County

Palm Beach County can strengthen its destination appeal by incorporating key strategies from San Juan, Nassau, and Bermuda, particularly in the areas of cultural storytelling, water-based tourism, and entertainment district development. These destinations have successfully differentiated themselves by weaving heritage and gastronomy into their visitor experience, such as Nassau's evolving Junkanoo Festival and San Juan's Saborea Puerto Rico Festival, which reinforce local identity while attracting high-value travelers. Palm Beach could expand its own culinary and cultural tourism initiatives by curating signature food festivals, immersive historical experiences, and high-end agritourism offerings that highlight its unique local character. Similarly, Bermuda's heritage trails and curated cultural tours offer inspiration for expanding interpretive programming, allowing visitors to engage more deeply with the region's historical and artistic legacy.

Beyond cultural enrichment, Palm Beach can enhance its water-based tourism and entertainment infrastructure to elevate its luxury brand positioning. Nassau and Bermuda's focus on yachting and island-hopping highlights the growing demand for private, bespoke marine experiences, an area where Palm Beach could expand its offerings with high-end yacht charters, curated maritime excursions, and exclusive waterfront activations. Additionally, San Juan's Distrito T-Mobile and the Nassau Cruise Port redevelopment showcase how integrated entertainment districts can serve as multi-use hubs for nightlife, culture, and hospitality. Palm Beach can continue to create a high-energy, walkable entertainment district near the Convention Center and other areas that merge luxury retail, waterfront dining, and performance venues.

VISITOR PREFERENCE ANALYSIS: PALM BEACH COUNTY VS. GLOBAL DESTINATIONS

The table below summarizes the simulated choices high-value visitor segments may make between visiting Palm Beach County or the reviewed global destinations. Green indicates “wins” by Palm Beach County, while pink represents “losses”.

VISITATION PREFERENCE – PALM BEACH COUNTY VS. DOMESTIC DESTINATIONS											
TARGET TRAVELER SEGMENT		ULTRA LUXURY			HIGH-END RESORT & LIFESTYLE			ACCESSIBLE CARIBBEAN			PALM BEACH WINS (OUT OF 9)
		MONACO	ST. BARTS	ABU DHABI	MARBELLA	THE ALGARVE	GOLD COAST	SAN JUAN	NASSAU	BERMUDA	
POWER ELITE	American Royalty										4
	Platinum Prosperity										0
	Kids and Cabernet										8
	Picture Perfect Families										8
	Couples with Clout										0
	Jet Set Urbanites										0
FLOURISHING FAMILIES	Across the Ages										7
	Babies and Bliss										8
	Family Fun-Tastic										6
	Cosmopolitan Achievers										2
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers										1
	Golf Carts and Gourmets										8
	Philanthropic Sophisticates										2
	Boomers and Boomerangs										2
PALM BEACH WINS (OUT OF 14)		6	6	4	6	6	8	9	5	6	

Visitor segment prefers PBC

Visitor segment prefers other destination

Palm Beach County fares less well relative to its global counterparts, “winning” only 44 percent of the visitor preference matchups (56 out of 126). The County performs exceptionally well among Flourishing Families and Booming with Confidence segments, securing eight wins in categories like Kids & Cabernet, Picture Perfect Families, and Golf Carts & Gourmets. This reinforces Palm Beach’s position as an ideal luxury destination for multi-generational travelers, second homeowners, and retirees seeking an upscale but relaxed lifestyle. However, its weak performance among Power Elite travelers—failing to win any matchups in Platinum Prosperity, Jet Set Urbanites, and Couples with Clout—suggests that it lacks the high-energy social scene, nightlife, and ultra-exclusive experiences that attract the world’s wealthiest elite. In contrast, destinations like Monaco, St. Barts, and Abu Dhabi continue to outperform Palm Beach in catering to these high-profile, high-net-worth visitors through their VIP social circuits, private nightlife venues, and invitation-only events.

A similar breakdown of where each segment would likely choose to live is summarized below.

VISITATION PREFERENCE – PALM BEACH COUNTY VS. DOMESTIC DESTINATIONS

TARGET TRAVELER SEGMENT		ULTRA LUXURY			HIGH-END RESORT & LIFESTYLE			ACCESSIBLE CARIBBEAN			PALM BEACH WINS (OUT OF 9)
		MONACO	ST. BARTS	ABU DHABI	MARBELLA	THE ALGARVE	GOLD COAST	SAN JUAN	NASSAU	BERMUDA	
POWER ELITE	American Royalty										9
	Platinum Prosperity										9
	Kids and Cabernet										9
	Picture Perfect Families										9
	Couples with Clout										9
	Jet Set Urbanites										9
FLOURISHING FAMILIES	Across the Ages										9
	Babies and Bliss										9
	Family Fun-Tastic										9
	Cosmopolitan Achievers										9
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers										9
	Golf Carts and Gourmets										9
	Philanthropic Sophisticates										9
	Boomers and Boomerangs										9
PALM BEACH WINS (OUT OF 14)		13	14	13	14	14	14	14	14	14	

	Visitor segment prefers PBC
	Visitor segment prefers other destination

Palm Beach County fares well as a residential destination in the global comparison set, winning 98% of matchups (124 out of 126). These data reaffirm Palm Beach County's standing as an elite, sought-after location for high-net-worth individuals, retirees, and affluent families seeking both exclusivity and long-term livability. Unlike Ultra Luxury destinations such as Monaco, St. Barts, and Abu Dhabi, which may offer prestige but lack year-round residential comfort and quality of life, Palm Beach combines luxury with accessibility, privacy, and a well-established community infrastructure.

The County's only minor gaps emerge in niche categories where ultra-exclusive destinations provide specialized appeal. The sole losses in this analysis occurred versus Abu Dhabi and Monaco for the exclusive, thrill-seeking Jet Set Urbanites segment, suggesting that these markets still capture some of the world's most elite, status-driven homeowners. However, the overwhelming strength across nearly all segments, from Power Elite to Booming with Confidence, indicates that Palm Beach's appeal is comprehensive, drawing in both legacy wealth and new affluence. The key opportunity for Palm Beach moving forward is to leverage its residential dominance to fuel tourism growth, particularly by attracting first-time visitors who may transition into second-home buyers or permanent residents. Strengthening its experiential offerings, expanding high-touch hospitality, and reinforcing its brand through exclusive lifestyle activations can help Palm Beach sustain its status as the premier luxury residential destination.

Key Takeaways and Potential Opportunities

Palm Beach County's status as a top-tier luxury destination is well-established, particularly among affluent families, retirees, and high-net-worth individuals who prioritize a refined lifestyle. Its dominance in the U.S. market, winning 64% of visitation preference matchups against comparable destinations, highlights its strength over Exclusive Getaway markets like Newport and Scottsdale. However, its inconsistent performance among the Power Elite signals an opportunity for refinement. To further solidify its reputation among ultra-high-net-worth travelers, Palm Beach should expand invite-only events, high-profile brand partnerships, and premium aviation and yachting experiences—elements that define the most elite global destinations.

On the world stage, Palm Beach's positioning is more family-oriented than its ultra-luxury peers like Monaco, St. Barts, and Abu Dhabi, which cater to a high-energy, jet-set elite. While it remains a luxury destination, its strongest international performance is among affluent families, as seen in its success with Picture Perfect Families and Kids & Cabernet travelers. This suggests Palm Beach is perceived as a prestigious yet approachable luxury alternative, rather than an exclusive nightlife or VIP social hub. Moving forward, the County may want to decide whether to lean into this high-end, multi-generational appeal or elevate its nightlife, cultural prestige, and experiential exclusivity to compete more aggressively with the world's most elite destinations.

If Palm Beach chooses to elevate its luxury standing on the global stage, stakeholders should consider investing in ideas like exclusive travel experiences, tailored luxury shopping, high-end hobbies, and cultural immersion to attract elite travelers. Expanding signature events, philanthropic experiences, culinary storytelling, and entertainment districts will further solidify its prestige, while investments in wellness retreats, luxury accommodations, adventure-driven offerings, and other initiatives will enhance its appeal across affluent demographics.

Based on this analysis, CSL has developed the following list of preliminary ideas for further developing Palm Beach County as a world-class destination. This list is further detailed in the Appendix.

Exclusive Travel Experiences

1. Yacht Charters And Marina Enhancements
2. Private Jet Services
3. Brightline Partnership

Luxury Accommodations

4. Exclusive Villas and Estates for Rent
5. Private Island Experiences
6. High-End, One of a Kind Beach Clubs
7. Influence Retreat House

Cultural Immersion

8. Private Art Tours and Commissions
9. Historic Landmark Buyouts

Adventure & Exploration

10. Luxury Safari-Style Wildlife Experiences
11. Underwater Adventures
12. Glamping Development

Wellness & Relaxation

13. Luxury Spa Retreats
14. Private Fitness and Wellness Coaches

Exclusive Events & Experiences

15. Private Concerts and Entertainment
16. VIP Polo and Equestrian Packages
17. Gastronomic Experiences

Philanthropic Experiences

18. Conservation Partnerships
19. Cultural Preservation

High-End Hobbies

20. Private Golf Courses
21. Luxury Car Tours
22. Customized Fashion Experiences

Tailored Luxury Shopping

23. Exclusive Jewelry Design
24. Private Shopping on Worth Avenue

Festivals and Events

25. High-End Destination Festival
26. Prioritize High-Impact Meetings

Cultivating Culinary

27. Growing High-End Dining
28. Growing Experiential Dining
29. Agritourism as a Storyteller

Event Facility Investment

31. Sports Facilities
32. Conventions and Entertainment Facilities



APPENDIX



FORT LAUDERDALE

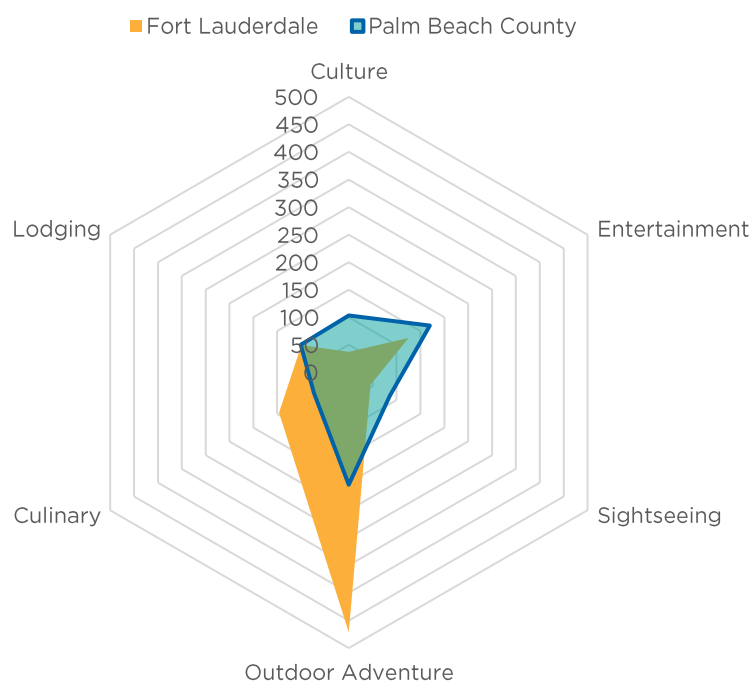
FLORIDA



FORT LAUDERDALE FLORIDA

Fort Lauderdale is a dynamic, world-class destination known for its scenic waterfronts, luxury resorts, rich cultural offerings, and outdoor recreation. The city's unique combination of beaches, boating, arts and culture, and family-friendly experiences makes it a highly appealing location for a diverse array of tourists. The destination offers opportunities for visitors seeking luxurious escapes, outdoor adventures, and/or cultural enrichment.

\$50,633,300 <i>(VISIT LAUDERDALE CVB)</i>	12.00% <i>(6.00% COUNTY & 6.00% STATE)</i>	35.8 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



**WATERFRONT
ACTIVATION**

YACHTING IDENTITY

**CONVENTION CENTER
INVESTMENT FOCUS**

FORT LAUDERDALE FLORIDA

OVERALL TAKEAWAYS

- **Luxury and Outdoor Recreation** – Fort Lauderdale offers a combination of luxury hotels, waterfront resorts, and boating experiences.
- **Cultural and Festivals** – The city boasts a vibrant cultural scene with notable events like the Fort Lauderdale International Film Festival, Las Olas Art Fair, and Pride Festival.
- **Wellness and Experiences** – With its numerous luxury spas and wellness retreats such as those at The Ritz-Carlton, Four Seasons, and W Fort Lauderdale, the city is an attractive destination for travelers seeking relaxation, spa experiences, and overall wellness.
- **Sustainability and Transit** – Fort Lauderdale’s eco-friendly initiatives, like the Water Taxi and electric boats (Ecoboats), enhance the city’s appeal to eco-conscious travelers by promoting sustainable transportation and protecting the city’s natural resources.
- **High-Value Visitor Draws** – The city attracts a mix of affluent travelers, families, and eco-tourists through sophisticated assets such as luxury resorts and hotels, shopping on Las Olas Boulevard, yacht tours, and public art.
- **Infrastructure and Safety** – Investments in transportation infrastructure, visitor facilities, and safety measures ensure that tourists have an enjoyable and secure experience while exploring the city.
- **Future Growth** – The city is focused on enhancing its cultural offerings and promoting community engagement to attract a broader range of tourists. The upcoming expansion of the Broward County Convention Center, which will add 525,000 square feet of event space and an 801-room hotel, demonstrates active growth and is expected to drive significant tourism growth, particularly in the convention and business event sectors.
- **Competing with Palm Beach** – Fort Lauderdale’s outdoor adventure and wellness tourism focus contrasts with Palm Beach’s luxury beachfront appeal, providing an alternative for travelers seeking a more dynamic urban lifestyle alongside luxury.

PRIMARY ASSETS

Fort Lauderdale is widely recognized for its boating culture and waterfront activities, making it a key destination for boating enthusiasts. Iconic landmarks like Fort Lauderdale Beach, the Intracoastal Waterway, and Las Olas Boulevard offer visitors a mix of beachfront relaxation and high-end shopping, while also featuring a notable arts and culture scene.

The Fort Lauderdale International Boat Show, Winterfest Boat Parade, and festivals such as Tortuga Music Festival help position the city as a major cultural and event destination. With a focus on luxury and family-friendly amenities, Fort Lauderdale also offers water-based outdoor adventure, such as scuba diving, sailing, and water sports that appeal to active travelers. Interactive museums, family attractions, and wellness resorts further enhance the city's appeal as an ideal destination for multi-generational travelers.

While Fort Lauderdale and Palm Beach County share similarities, such as their coastal locations, focus on luxury tourism, and high-end dining and shopping experiences, there are several critical differences that make each destination unique. Fort Lauderdale's reputation as the "Yachting Capital of the World" and its focus on water-based activities set it apart, attracting boating enthusiasts and eco-tourists. In contrast, Palm Beach County offers more of an exclusive, serene environment, with a strong emphasis on privacy, golf resorts, and upscale cultural events, making it a top choice for those seeking a more relaxed luxury lifestyle. Another key difference is the vibrant nightlife and arts scene in Fort Lauderdale, driven by events like the Tortuga Music Festival, which appeals to a younger, adventure-seeking crowd, while Palm Beach County attracts visitors interested in more refined, heritage-focused cultural experiences. Finally, Fort Lauderdale's family-friendly atmosphere, with its accessible beaches and interactive museums, contrasts with Palm Beach County's appeal to multi-generational families seeking seclusion and high-end resort experiences.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Fort Lauderdale is expanding its appeal to wellness travelers by offering spa retreats, beachside wellness programs, and holistic health services at resorts like The W Fort Lauderdale and The Ritz-Carlton. The city's proximity to notable medical facilities makes it a growing hub for medical tourism, with services ranging from cosmetic surgery to rehabilitation programs.

Immersive Experiences: Fort Lauderdale is responding to growing demand for immersive tourism by integrating art, technology, and community engagement into its cultural events like the Las Olas Art Fair, Pride Festival, and Fort Lauderdale International Film Festival. The city's Mad Arts Museum is its first immersive art museum that combines technology and interactive art. The city enhances visitor engagement through public art installations along the Riverwalk and plans to expand interactive art offerings at the Riverwalk.

Authenticity and Cultural Enrichment: Fort Lauderdale showcases its rich maritime heritage and local history through landmarks like the Stranahan House and Bonnet House Museum & Gardens. The city is enhancing its cultural offerings with interactive historical tours and local art exhibitions that allow visitors to engage more deeply with its history and culture, fostering a stronger connection to the destination.

Sustainability: Fort Lauderdale is advancing eco-friendly tourism through initiatives like electric water taxis, solar-powered boats, and green hotel certifications. The city is also expanding its eco-tourism offerings, such as sustainable boating tours and wildlife conservation programs, aiming to position itself as a leader in sustainability within Florida's tourism market.

Eatertainment and Premium Event Experiences: Fort Lauderdale is leveraging its luxury dining and eatertainment options with restaurants like Steak 954 and Café del Mar, where gourmet meals are paired with live entertainment. The city actively encourages entrepreneurs with new and exciting concepts in this space. Events like the Las Olas Wine & Food Festival and gourmet food events enhance the city's appeal to visitors seeking premium experiences that combine fine dining and social atmosphere.

Outdoor Adventure and Sports: Fort Lauderdale capitalizes on its access to beaches and waterways to offer a wide range of water sports. Additionally, hosting more sports events such as beach volleyball and triathlons further enhances the city's appeal to sports tourism.

Content Creation: Fort Lauderdale leverages its scenic beaches and luxury resorts as prime locations for content creation. The CVB partners with influencers and travel bloggers to showcase Instagram-worthy spots, boosting its visibility among younger, tech-savvy travelers.

Inclusivity: Fort Lauderdale is noted for its LGBTQ+ friendly atmosphere, especially during events like Fort Lauderdale Pride. The city's No End to the Rainbows campaign highlights its commitment to inclusivity, promoting a welcoming environment across the market. Ensuring ADA-compliance at all attractions further expands its appeal to diverse visitors.

Multi-Generational Appeal: Fort Lauderdale offers a range of family-friendly experiences, from the Museum of Discovery and Science to interactive parks and Fort Lauderdale Beach. The city caters to multi-generational travel with family-oriented resorts and activities that appeal to all ages, encouraging longer stays and repeat visits.

FORT LAUDERDALE FUTURE TOURISM STRATEGIES

Fort Lauderdale's tourism strategy focuses on sustainability, luxury, and cultural diversity to position the city as a dynamic, immersive destination. The city is enhancing visitor experiences through initiatives like interactive art exhibits and expanding its cultural and public art installations along the Riverwalk, such as its "Thrive" sculpture which has gained recognition on a world stage. Infrastructure improvements, such as bike-sharing programs and expanded public transit, aim to create a seamless tourist experience while navigating cultural hubs and natural landscapes.

Eco-tourism remains a priority with solar-powered boats, green hotels, and expanding sustainable tourism offerings, such as its "Blue Wave Beaches" sustainably certified beaches. The city is also increasing its focus on local art, supporting public art installations, and promoting cultural festivals to deepen its appeal to art and culture tourists. These efforts will position Fort Lauderdale as a growing cultural hub with interactive art districts and engaging visitor experiences.

Fort Lauderdale's chamber, the CVB, and economic development teams continue to foster collaboration with local businesses and residents to ensure that tourism growth is sustainable and beneficial to the community. The city's commitment to sustainability is further reflected in initiatives like eco-tourism experiences and the development of conservation programs.

The city is also refining its digital marketing strategies, targeting affluent travelers, eco-tourists, and millennials through tailored campaigns and social media partnerships. Enhanced transportation infrastructure and safety measures, such as increased use of traffic technology and police crime identification technology, will ensure that Fort Lauderdale remains a secure, accessible, and welcoming destination for all visitors.

HIGH VALUE VISITOR PREFERENCES: FORT LAUDERDALE VS. PALM BEACH COUNTY

Palm Beach County outperformed Fort Lauderdale as the preferred place to live across nearly all Mosaic segments, with only "Across the Ages" favoring Fort Lauderdale for both visiting and living. PBC's appeal is driven by its exclusive estates, tax-friendly policies, and luxury lifestyle, which resonated with segments like "American Royalty," "Platinum Prosperity," and "Golf Carts and Gourmets." In contrast, Fort Lauderdale's preference among "Across the Ages" highlights its appeal to multi-generational households looking for a more active, entertainment-focused urban environment.

For visitation, PBC also led among most segments, particularly those valuing high-end leisure, country clubs, and premier real estate, such as "Philanthropic Sophisticates" and "Sophisticated City Dwellers." Fort Lauderdale, however, stood out as a preferred destination for "Across the Ages," likely due to its vibrant waterfront, social atmosphere, and broader mix of generational appeal. While Fort Lauderdale offers an energetic and accessible coastal experience, PBC's polished, high-net-worth lifestyle and family-friendly luxury make it the stronger choice for affluent travelers and long-term residents alike.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC due to its exclusive estates, wealth-friendly environment, and refined luxury.
	Platinum Prosperity	PBC	PBC	PBC wins for both visiting and living due to its stable high-net-worth lifestyle, elite amenities, and tax advantages.
	Kids and Cabernet	PBC	PBC	PBC is the preferred choice for both visiting and living, offering top schools, upscale suburban living, and family-friendly activities.
	Picture Perfect Families	PBC	PBC	PBC provides the perfect blend of affluence, safety, and a strong sense of community, making it the preferred destination for families.
	Couples with Clout	PBC	PBC	PBC remains the top choice for luxury living, high-end leisure, and strong social networking opportunities.
	Jet Set Urbanites	PBC	PBC	PBC is the clear winner for both visiting and living, offering an upscale urban experience with a mix of exclusivity and coastal charm.
FLOURISHING FAMILIES	Across the Ages	Fort Lauderdale	Fort Lauderdale	Fort Lauderdale wins for both visiting and living due to its mix of waterfront accessibility, entertainment, and strong community feel.
	Babies and Bliss	PBC	PBC	PBC is the ideal place for young families to visit and settle, offering excellent schools, family-friendly neighborhoods, and a relaxed suburban lifestyle.
	Family Fun-Tastic	PBC	PBC	PBC is the clear winner for both visiting and living, with strong family-oriented recreational options and well-developed communities.
	Cosmopolitan Achievers	PBC	PBC	PBC offers a strong mix of career opportunities, cultural experiences, and a high standard of living, making it the preferred place for both visiting and living.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	PBC	PBC is the clear winner for both visiting and living, offering refined city experiences in an upscale coastal environment.
	Golf Carts and Gourmets	PBC	PBC	PBC dominates as the preferred destination for both visiting and living, providing world-class golf courses, fine dining, and high-end leisure opportunities.
	Philanthropic Sophisticates	PBC	PBC	PBC remains the best environment for year-round philanthropic engagement and deep community involvement.
	Boomers and Boomerangs	PBC	PBC	PBC is the clear choice for both visiting and living, with strong retirement appeal, upscale communities, and a thriving social scene.
	PALM BEACH WINS (OUT OF 14)	13	13	FORT LAUDERDALE IS A VIBRANT WATERFRONT TRAVEL DESTINATION, BUT PBC REMAINS THE TOP CHOICE FOR ITS EXCLUSIVE ESTATES AND LEISURE LIFESTYLE.

BENCHMARKING LESSONS

To compete with Fort Lauderdale, Palm Beach County can draw key lessons from the city's successful tourism model. First, Fort Lauderdale's focus on water-based tourism and eco-tourism has attracted eco-conscious travelers. Palm Beach County can enhance its waterfront attractions and eco-friendly initiatives, such as eco-tours and sustainable boating, to appeal to outdoor enthusiasts and eco-tourists. Fort Lauderdale's vibrant arts and cultural scene—including festivals, public art, and interactive events—has set it apart. Palm Beach County could expand its cultural offerings, support local artists, and host more immersive cultural experiences to attract visitors interested in heritage and the arts. Fort Lauderdale's success in family and multi-generational tourism provides a model for Palm Beach County. The city's variety of family-friendly resorts, museums, and outdoor spaces makes it a top destination for families. Palm Beach could strengthen its family attractions by developing more interactive museums and children's activities. Palm Beach is already addressing these areas with significant expansions of facilities alike the Cox Science Center and Aquarium. In wellness tourism, Fort Lauderdale leads with its luxury wellness retreats and spa services. Palm Beach County can enhance its offerings by expanding wellness resorts, fitness-focused activities, and health-oriented events to attract travelers seeking relaxation and rejuvenation.

While Fort Lauderdale offers a dynamic mix of vibrant tourism experiences, Palm Beach County can continue to maintain its identity as the more refined and high-end destination by focusing on the exclusivity, privacy, and heritage that have long defined the area. Palm Beach County's reputation as a luxury retreat, with its secluded estates, world-class resorts, and emphasis on elite cultural events, appeals to travelers who seek sophistication and tranquility. By investing in and promoting experiences that highlight its understated elegance and prestige, Palm Beach can continue to attract high-value visitors who appreciate both seclusion and luxury in a serene, cultural environment. These investments could include the development of upscale wellness retreats, high-end culinary events, luxury yachting/boating experiences, and other premium asset developments.



HILTON HEAD ISLAND

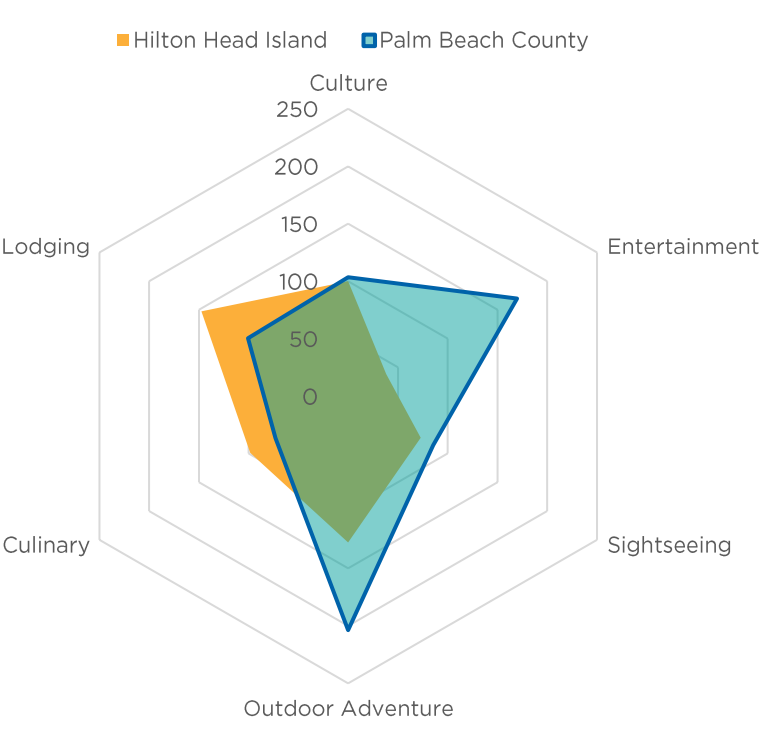
SOUTH CAROLINA



HILTON HEAD ISLAND SOUTH CAROLINA

Hilton Head Island is a coastal destination known for its beaches, golf courses, sustainable tourism efforts, and cultural heritage. It features high-end resorts, eco-tourism activities, and a family-friendly environment, attracting affluent families, retirees, and environmentally conscious travelers.

\$8,125,000 <i>(HILTON HEAD ISLAND CVB)</i>	10.00% <i>(3.00% TOURISM & 7.00% STATE)</i>	15.8 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



YACHTING IDENTITY



**ELEVATED DINING /
SEAFOOD FESTIVAL**



**THE HARBOR
(ENTERTAINMENT
DISTRICT)**

HILTON HEAD ISLAND SOUTH CAROLINA

OVERALL TAKEAWAYS

- **Luxury & Leisure Appeal** – Hilton Head attracts affluent travelers and retirees with luxury resorts, championship golf courses, and waterfront leisure experiences.
- **Sustainable & Eco-Tourism** – A strong commitment to environmental conservation, green tourism, and nature-based recreation.
- **Cultural & Heritage Tourism** – The island preserves and promotes Gullah Geechee culture and historic attractions, providing a deep sense of place and authenticity.
- **Outdoor Recreation & Active Lifestyles** – A focus on cycling, water sports, and eco-adventure activities, making the island a haven for active travelers.
- **High-Value Visitors** – Attracts affluent families, multi-generational travelers, and retirees seeking peaceful, upscale vacation experiences.
- **Boutique & Culinary Tourism** – Luxury dining, seafood festivals, and farm-to-table experiences enhance Hilton Head's premium food and wine tourism.
- **Competing with Palm Beach County** – Hilton Head's eco-tourism and relaxed, family-friendly environment contrast with Palm Beach County's larger urban appeal and vibrant entertainment scene.

PRIMARY ASSETS

Hilton Head Island stands out as a premier coastal destination, seamlessly blending sustainable tourism, upscale leisure, and a family-friendly atmosphere. The island's development has long prioritized environmental conservation, ensuring that its natural beauty remains a core attraction. Its eco-friendly approach is evident in the extensive biking trails, guided kayaking tours, and wildlife refuges, while the Coastal Discovery Museum provides immersive education on Lowcountry conservation and history. Hilton Head's commitment to sustainability extends to initiatives like oyster shell recycling programs and conservation-focused tourism experiences.

The island is also a renowned golf and tennis destination. Harbour Town Golf Links, home to the RBC Heritage PGA Tour event, offers one of the country's most scenic and prestigious courses. Tennis enthusiasts can take advantage of top-tier facilities such as the Smith Stearns Tennis Academy at The Sea Pines Resort and the Palmetto Dunes Tennis & Pickleball Center, both of which cater to players of all skill levels year-round.

Cultural heritage is another defining feature of Hilton Head, with the island actively preserving and promoting Gullah Geechee traditions. Attractions like Mitchelville Freedom Park and the Gullah Heritage Tours provide visitors with a deeper understanding of the region's African American history through interactive storytelling and historic sites.

Luxury and wellness tourism thrive on Hilton Head, where high-end resorts emphasize relaxation, sustainability, and locally sourced cuisine. Properties like The Sea Pines Resort integrate eco-conscious practices with world-class amenities, offering spa retreats, beachfront wellness programs, and culinary experiences rooted in the island's rich natural resources. Meanwhile, Shelter Cove Harbour serves as a vibrant marina district, combining boutique shopping, waterfront dining, and recreational boating to create an upscale coastal experience.

RESPONDING TO TRENDS

Sustainability & Eco-Tourism: Hilton Head Island has long prioritized sustainability, with strict environmental protections and conservation-focused attractions reinforcing its reputation as a green destination. The island's extensive biking infrastructure, nature preserves, and coastal conservation initiatives make it a leader in eco-tourism. The Coastal Discovery Museum serves as a hub for environmental education and wildlife preservation programs, offering guided tours that highlight the Lowcountry's fragile ecosystems. Additionally, Hilton Head's beach renourishment projects and wetland conservation efforts ensure the longevity of its natural resources, while initiatives such as The Outside Foundation's oyster shell recycling program actively engage visitors in sustainability efforts.

Wellness & Transformative Experiences: As wellness tourism continues to grow, Hilton Head has responded by integrating holistic wellness offerings into its resort experiences. Luxury properties such as The Westin Hilton Head Resort & Spa and Omni Hilton Head Oceanfront Resort have developed wellness-focused programming that includes beachfront yoga, meditation retreats, and farm-to-table dining emphasizing organic and sustainable ingredients. Many of the island's resorts also offer cycling programs, nature walks, and fitness-focused vacations, catering to health-conscious travelers seeking active and rejuvenating getaways. Additionally, Hilton Head's commitment to low-impact tourism and stress-free coastal environments makes it an ideal setting for travelers looking for transformative wellness experiences in nature.

Culinary & Boutique Tourism: Hilton Head's culinary tourism scene has evolved to attract high-value visitors seeking authentic, premium experiences. The island hosts celebrated events like the Hilton Head Island Seafood Festival and the Hilton Head Wine & Food Festival, which showcase regional cuisine, locally sourced seafood, and Lowcountry specialties. Upscale dining establishments such as Michael Anthony's Cucina Italiana and The Sage Room offer curated chef-driven experiences, exclusive wine pairings, and intimate private dining, making Hilton Head a destination for gourmet travelers. Sustainability is also woven into the island's dining culture, with many restaurants emphasizing fresh, locally sourced ingredients and seafood sustainability initiatives that align with Hilton Head's broader conservation efforts.

Multi-Generational & Family Travel: Hilton Head has positioned itself as a premier destination for multi-generational travel, offering a blend of kid-friendly eco-tourism, interactive history tours, and outdoor adventure programs. The island's bike-friendly infrastructure encourages families to explore its 12 miles of beaches, nature trails, and wildlife refuges together. Attractions such as Mitchelville Freedom Park and the Gullah Heritage Tours provide engaging and educational cultural experiences that introduce younger generations to the island's rich history. Meanwhile, family-friendly resorts, including Disney's Hilton Head Island Resort, cater to multi-generational visitors with kid-focused activities, interactive learning programs, and waterfront recreation.

Marina-Based Tourism: Hilton Head's marina districts and yachting experiences play a crucial role in shaping its reputation as a luxury coastal destination. Shelter Cove Harbour & Marina serves as the epicenter of upscale waterfront entertainment, featuring boutique shopping, fine dining, and seasonal festivals such as HarbourFest, which draws visitors with live music, fireworks, and cultural performances. The island's extensive boating and sailing offerings—including private yacht charters, dolphin-watching excursions, and deep-sea fishing tours—attract affluent travelers seeking a premium waterfront experience. Hilton Head has successfully developed a maritime tourism ecosystem that balances luxury and accessibility, ensuring that visitors can engage with the island's waterways in a way that aligns with its commitment to sustainability and conservation.

FUTURE TOURISM STRATEGIES

Hilton Head Island is proactively implementing strategies to retain and enhance its tourism identity, focusing on sustainability, cultural heritage, wellness, and recreation. The island's Strategic Action Plan 2023-2025 emphasizes growth management, workforce housing, and traffic solutions to support sustainable tourism. To preserve its natural beauty, Hilton Head is investing in projects such as beach nourishment, street and pathway improvements, and park enhancements. These initiatives aim to bolster the island's appeal to eco-conscious travelers.

In the realm of cultural heritage, the island is collaborating with community partners to gather and document its rich history. This includes visual storytelling, comprehensive itineraries, and digital campaigns to promote heritage travel. Recognizing the growing demand for wellness tourism, Hilton Head is building upon its strong foundation as a wellness destination. Efforts include developing digital and social media campaigns, creating itineraries and programs to drive overnight visitation, and capturing new content to showcase the island's wellness offerings.

To enhance recreational experiences, the island is integrating recreation imagery, storytelling, and promotional efforts across various platforms. This approach aims to connect more deeply with visitors and promote seasonally appropriate activities year-round. Through these targeted initiatives, Hilton Head Island is positioning itself to meet evolving traveler preferences while preserving its unique character and natural environment.

HIGH VALUE VISITOR PREFERENCES: HILTON HEAD ISLAND VS. PALM BEACH COUNTY

Palm Beach County strongly outperformed Hilton Head Island as the preferred place to live across all Mosaic segments, reinforcing its position as a top-tier destination for affluent, family-oriented, and luxury-seeking residents. Segments such as "American Royalty," "Platinum Prosperity," and "Golf Carts and Gourmets" overwhelmingly preferred PBC for its year-round luxury lifestyle, high-end communities, and wealth-friendly environment. Hilton Head Island, while an attractive coastal retreat, lacked the financial and social advantages that make PBC a premier residential choice, particularly for those seeking a balance of exclusivity, amenities, and economic stability.

For visitation, Hilton Head Island had stronger appeal among specific family and multi-generational segments, including "Kids and Cabernet," "Picture Perfect Families," and "Across the Ages." These groups saw Hilton Head as an appealing, peaceful getaway, known for its scenic beauty, golf courses, and relaxed coastal charm. However, PBC remained the dominant travel destination for high-net-worth individuals and luxury-driven segments like "Philanthropic Sophisticates" and "Sophisticated City Dwellers." While Hilton Head Island thrives as a tranquil retreat, PBC's broader mix of luxury accommodations, premier cultural attractions, and elite social scene make it the stronger long-term choice for both living and high-end travel.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC for its exclusivity, estate lifestyle, and wealth-friendly policies.
	Platinum Prosperity	PBC	PBC	PBC wins as both the preferred travel and living destination due to its elite social scene, refined luxury, and high-net-worth advantages.
	Kids and Cabernet	Hilton Head Island	PBC	Hilton Head Island provides a charming, family-friendly coastal retreat for visits, but PBC is preferred for its upscale suburban environment and top-tier education.
	Picture Perfect Families	Hilton Head Island	PBC	Visits Hilton Head Island for its scenic, laid-back appeal but chooses PBC for its premier schools, safety, and luxury living.
	Couples with Clout	PBC	PBC	PBC remains the top choice for both visiting and living, offering high-end leisure, networking opportunities, and a refined social scene.
	Jet Set Urbanites	PBC	PBC	PBC is the clear winner for both visiting and living, offering an upscale urban experience with international accessibility.
FLOURISHING FAMILIES	Across the Ages	Hilton Head Island	PBC	Hilton Head Island is a peaceful, scenic destination for visiting, but PBC is preferred for its strong multi-generational community and vibrant amenities.
	Babies and Bliss	Hilton Head Island	PBC	Hilton Head Island offers a quiet family vacation setting, but PBC is ideal for long-term family living due to its safe, high-end communities.
	Family Fun-Tastic	Hilton Head Island	PBC	Hilton Head Island provides a relaxing getaway, but PBC is the top choice for living due to its variety of recreational activities and family-friendly atmosphere.
	Cosmopolitan Achievers	PBC	PBC	PBC remains the top destination for both visiting and living, with unmatched career opportunities and high-end cultural experiences.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	PBC	PBC is the clear winner for both visiting and living, offering an elegant metropolitan experience with a relaxed coastal lifestyle.
	Golf Carts and Gourmets	PBC	PBC	PBC dominates as the preferred destination for both visiting and living, providing world-class golf courses, fine dining, and an upscale leisure community.
	Philanthropic Sophisticates	PBC	PBC	PBC remains the best environment for year-round philanthropic engagement and deep community involvement.
	Boomers and Boomerangs	PBC	PBC	PBC is the top choice for both visiting and living, offering strong retirement appeal, upscale communities, and a thriving social scene.
	PALM BEACH WINS (OUT OF 14)	9	14	HILTON HEAD ISLAND IS A PEACEFUL, SCENIC TRAVEL RETREAT, BUT PBC IS FAVORED FOR ITS LUXURIOUS, YEAR-ROUND RESIDENTIAL APPEAL.

BENCHMARKING LESSONS

Hilton Head Island has successfully differentiated itself through sustainable tourism, immersive cultural experiences, and outdoor adventure tourism. While Palm Beach County thrives as a luxury destination with a vibrant social scene, it can broaden its appeal by incorporating best practices from Hilton Head.

One major takeaway is Hilton Head's commitment to experiential tourism, particularly in eco-tourism and cultural storytelling. Palm Beach County can enhance its historical and environmental tourism offerings by promoting interactive museums, guided nature walks, and high-end wellness retreats. Additionally, Palm Beach should work to diversify its appeal beyond luxury tourism, ensuring that visitors can enjoy adventure tourism, cultural immersion, and sustainable travel experiences.

By enhancing sustainability initiatives, expanding nature-based recreation, and strengthening boutique travel experiences, Palm Beach County can successfully compete with Hilton Head Island while broadening its tourism market for the future. Hilton Head Island has successfully crafted a tourism identity centered around sustainability, cultural heritage, and immersive outdoor experiences, positioning itself as a premier destination for affluent families, wellness travelers, and eco-conscious visitors. While Palm Beach County has established itself as a luxury destination with a vibrant social scene, it can enhance its competitive edge by adopting key elements of Hilton Head's approach without compromising its own distinct appeal. A primary takeaway from Hilton Head is its deep integration of sustainability into its tourism strategy, from its protected nature preserves and bike-friendly infrastructure to its eco-conscious resort developments and marine conservation initiatives. Palm Beach County can draw inspiration from Hilton Head's commitment to low-impact tourism, incorporating expanded green spaces, sustainable hospitality practices, and environmental education programs that cater to modern travelers who prioritize conservation.

Hilton Head's emphasis on cultural storytelling and experiential tourism also provides valuable insights. The island's Gullah Geechee heritage programming, including interactive history tours and cultural festivals, has successfully created meaningful, immersive visitor experiences. Palm Beach County can expand its heritage tourism offerings, particularly in African American, Caribbean, and maritime history, by developing storytelling-driven attractions, artisan markets, and curated heritage districts that celebrate its diverse cultural influences. Additionally, Hilton Head's multi-generational travel appeal has been strengthened by its family-friendly outdoor activities and interactive learning experiences, a model that Palm Beach can follow by enhancing eco-adventure parks, marine discovery centers, and historical reenactment experiences.



JACKSONVILLE + ST. AUGUSTINE FLORIDA

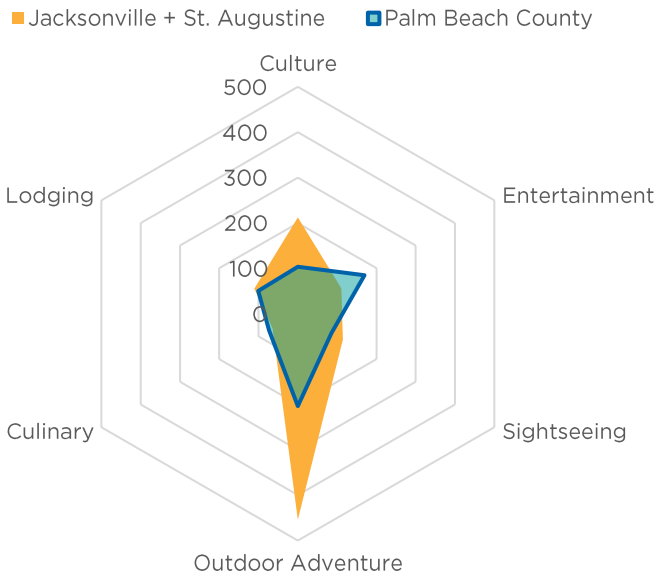


JACKSONVILLE + ST. AUGUSTINE FLORIDA

Based on the size of Palm Beach County, CSL observed Jacksonville and St. Augustine as a single tourism destination, more like the geographic makeup of Palm Beach County when combined.

Jacksonville and St. Augustine offer a mix of historical, cultural, and outdoor tourism. St. Augustine, the oldest city in the U.S., features a well-preserved historic district, interactive museums, and Spanish colonial heritage sites. Jacksonville, as a larger metropolitan area, has a growing cultural and sports tourism presence, with professional sports, waterfront development, and an expanding arts and music scene. The region’s beaches, state parks, and riverfront recreation attract outdoor and eco-tourism visitors, while major events like the Florida-Georgia football game, Nights of Lights, and the Jacksonville Jazz Festival drive year-round visitation.

<p>\$5,125,400 (JACKSONVILLE AND THE BEACHES CVB)</p> <p>\$5,949,100 (FLORIDA'S HISTORIC COAST / ST. AUGUSTINE)</p>	<p>12.50% (JACKSONVILLE - 6.00% COUNTY, 6.00% STATE, 0.5% LOCAL OPTION)</p> <p>11.5% (ST. AUGUSTINE - 5.00% COUNTY, 6.00% STATE, 0.5% LOCAL OPTION)</p>	<p>26.9 MILLION</p>
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



SPORTS

HERITAGE & HISTORY

SUSTAINABILITY FOCUSES

JACKSONVILLE + ST. AUGUSTINE FLORIDA

OVERALL TAKEAWAYS

- **Historic and Cultural Heritage** – St. Augustine, as America’s oldest city, is a model for living history, interactive tourism, and historic preservation as an economic driver.
- **Outdoor Adventure and Waterfront Activation** – Jacksonville ranks highly for eco-tourism, outdoor sports, and beach accessibility, which contrasts with Palm Beach County’s more luxury-centric coastal tourism.
- **Festivals and Events** – Jacksonville and St. Augustine maximize year-round festivals to drive tourism beyond peak seasons, including the Florida-Georgia football game, Nights of Lights, and the Jacksonville Jazz Festival.
- **Sports Tourism Expansion** – Jacksonville has capitalized on NFL, youth sports, and major sporting events, providing a roadmap for Palm Beach County’s efforts to grow sports tourism.
- **Affordable and Multi-Generational Appeal** – The region offers more affordability than Palm Beach County, making it attractive for families, history enthusiasts, and adventure seekers.
- **Sustainability and Eco-Tourism** – The area emphasizes state parks, nature preserves, and conservation-based tourism.
- **Branding and Identity Growth** – Jacksonville is in a transition phase, developing a stronger brand identity, whereas St. Augustine already has clear heritage-based branding.
- **Competing with Palm Beach County** – While Palm Beach thrives on luxury, golf, and exclusive experiences, Jacksonville and St. Augustine cater to history lovers, adventure seekers, and sports fans, offering valuable lessons in diversification.

PRIMARY ASSETS

Jacksonville and St. Augustine offer a diverse tourism experience, combining historical attractions, outdoor recreation, and event-driven visitation. St. Augustine, home to Castillo de San Marcos, the Colonial Quarter, and the Fountain of Youth Archaeological Park, is a leader in heritage tourism, offering immersive experiences such as living history reenactments and guided pirate tours. Jacksonville complements this with modern cultural assets like the Cummer Museum of Art & Gardens, MOSH, and the Ritz Theatre and Museum, expanding the region’s appeal beyond history-focused visitors.

Outdoor and eco-tourism play a significant role in both cities. The St. Johns River and Jacksonville’s Atlantic beaches support boating, fishing, and surfing, while Anastasia State Park and Guana Tolomato Matanzas Reserve provide opportunities for hiking, wildlife viewing, and conservation-focused tourism. Jacksonville’s Riverwalk and downtown revitalization projects are expanding the city’s waterfront into a more active entertainment and social hub.

Sports tourism is a major economic driver, with Jacksonville hosting NFL games, The Players Championship at TPC Sawgrass, and the Florida-Georgia football game, while also growing as a youth sports tournament destination. Events like St. Augustine's Nights of Lights, the Jacksonville Jazz Festival, and Welcome to Rockville sustain year-round visitation, attracting a mix of cultural and entertainment-driven travelers.

While Jacksonville and St. Augustine share coastal beauty, outdoor activities, and cultural appeal with Palm Beach County, key differences set them apart. Jacksonville has a stronger emphasis on sports tourism, major events, and a growing urban entertainment scene, while St. Augustine leans heavily into heritage tourism and immersive historical experiences. Additionally, the region's affordability and multi-generational appeal contrast with Palm Beach County's more luxury-driven tourism model.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Jacksonville is home to Mayo Clinic Florida, a nationally recognized medical tourism hub attracting patients for specialized treatments. The city is investing in wellness-adjacent tourism, with luxury hotels and resorts offering medical recovery packages and extended-stay options for international patients. St. Augustine is seeing growth in coastal wellness retreats, boutique spas, and yoga studios catering to wellness-focused travelers. Resorts and boutique inns are incorporating holistic wellness offerings such as ocean therapy, meditation programs, and herbal health experiences, appealing to visitors seeking rejuvenation.

Immersive and Interactive Tourism: St. Augustine continues to lead in interactive history tourism, expanding offerings like costumed reenactments, living history programs, and pirate adventure experiences that provide hands-on engagement. Attractions such as the Colonial Quarter have expanded interactive components, including guided tours where visitors can try blacksmithing, musket firing, and colonial cooking. Jacksonville is integrating experiential tourism into its cultural districts, with projects like the Museum of Science & History's upcoming expansion, featuring AR-enhanced exhibits, interactive STEM programs, and space-themed simulations. Ghost tours, pirate cruises, and experiential art installations further enhance engagement, particularly for younger travelers seeking Instagrammable and story-driven attractions.

Authenticity and Cultural Enrichment: St. Augustine has successfully leveraged its Spanish colonial, pirate, and maritime history as a distinct tourism brand. Its ongoing efforts to restore and showcase historic sites have strengthened its appeal among cultural travelers. Jacksonville is investing in elevating its cultural tourism identity, with projects like the Lift Ev'ry Voice and Sing Park, a national historic landmark honoring Jacksonville's ties to African American history. The city is also supporting public art initiatives and expanding its arts districts, such as the Riverside Arts Market and Jax Art Walk, which feature local artists, live performances, and artisan vendors. The Ritz Theatre and Museum continues to highlight Jacksonville's place in Black history and music culture, further strengthening its authentic cultural narrative.

Sustainability and Eco-Tourism: Both cities have made eco-conscious tourism a priority, capitalizing on their extensive coastal and river ecosystems. Jacksonville's Timucuan Ecological and Historic Preserve offers guided eco-tours, wildlife conservation programs, and sustainable outdoor recreation. St. Augustine has introduced marine conservation tourism initiatives, including partnerships with local universities to educate visitors on sea turtle rehabilitation and sustainable seafood sourcing. Eco-lodges, guided nature walks, and educational programs at Guana Tolomato Matanzas Research Reserve reinforce a commitment to responsible tourism. Jacksonville is also exploring electric water taxis and expanded bike trail networks to reduce tourism's environmental impact.

Entertainment and "Eatertainment": Jacksonville's brewery scene is thriving, with the Jax Ale Trail actively promoting craft beer tourism through brewery partnerships, tasting events, and behind-the-scenes brewing experiences. The city's emerging entertainment districts, like the Downtown Southbank and Five Points, are developing dining concepts that merge food, live music, and interactive experiences. St. Augustine is incorporating its historical branding into its food scene, with Spanish tapas tours, rum distillery tastings, and immersive pirate-themed dinner shows. Seasonal food festivals and interactive culinary experiences are bringing a new level of engagement to the region's dining culture.

Outdoor Adventure and Sports Tourism: Jacksonville remains a leader in sports-driven tourism, with NFL games, The Players Championship at TPC Sawgrass, and the Florida-Georgia football rivalry bringing in major visitation. The city is expanding youth sports tourism by investing in multi-sport tournament complexes and hosting national travel baseball, soccer, and lacrosse events. St. Augustine is further developing its beach and nature-based adventure tourism, with paddleboarding trails, guided eco-kayak excursions, and surfing experiences at Anastasia State Park. Jacksonville Beach is also seeing growth in outdoor fitness tourism, with beach yoga retreats and waterfront fitness events gaining popularity.

Content Creation and Social Media Appeal: St. Augustine's cobblestone streets, historic forts, and lighthouse views make it naturally Instagrammable, and the city has amplified this by launching photo-op campaigns, influencer partnerships, and interactive visitor challenges. Jacksonville is utilizing its street art scene, rooftop dining, and waterfront attractions to promote content-driven tourism, inviting creators to highlight the city's evolving urban appeal. Hashtag-driven tourism campaigns and digital storytelling efforts have helped increase online visibility, positioning both destinations for younger, experience-seeking travelers.

Multi-Generational Travel Appeal: Both cities cater well to multi-generational travelers, offering a mix of history, outdoor recreation, and family-friendly attractions. St. Augustine has expanded family-focused heritage programming, including kid-friendly museum exhibits, pirate-themed boat tours, and scavenger hunts through the historic district. Jacksonville is growing its family tourism appeal through attractions like MOSH's upcoming expansion, Adventure Landing water park, and eco-tourism initiatives that appeal to all ages. These developments reinforce the region's ability to attract families, history enthusiasts, and adventure-seekers alike.

FUTURE TOURISM STRATEGIES

Jacksonville and St. Augustine are advancing heritage tourism, sports tourism, waterfront activation, and sustainability initiatives to enhance visitor experiences. Heritage tourism is expanding with AR-enhanced tours at the Colonial Quarter and Castillo de San Marcos, digital self-guided exhibits, and expanded reenactment programs. Jacksonville is developing the Lift Ev'ry Voice and Sing Park and expanding programming at the Ritz Theatre and Museum to highlight African American history.

Waterfront activation includes Jacksonville's Riverwalk expansion with new dining, nightlife, and pedestrian pathways. St. Augustine is growing seasonal festivals, including an expanded Pirate & Colonial Festival and new maritime heritage events. Sports tourism is growing with multi-sport tournament complexes in Jacksonville for national youth events and enhanced golf tourism at TPC Sawgrass with upgraded spectator zones.

Sustainability initiatives include conservation-based tourism in the Timucuan Preserve and St. Augustine's eco-education programs in partnership with marine research organizations. Smart tourism is integrating interactive wayfinding kiosks in St. Augustine's historic areas. Family-friendly tourism is expanding with interactive scavenger hunts and kid-friendly museum exhibits in St. Augustine.

HIGH VALUE VISITOR PREFERENCES: JACKSONVILLE + ST. AUGUSTINE VS. PALM BEACH COUNTY

Palm Beach County decisively outperformed Jacksonville + St. Augustine as the preferred place to live among most Mosaic segments, with "American Royalty," "Platinum Prosperity," and "Philanthropic Sophisticates" favoring PBC for its luxury lifestyle, elite social circles, and tax-friendly environment. While Jacksonville + St. Augustine attracted some interest from family-focused and multi-generational segments such as "Across the Ages," "Babies and Bliss," and "Family Fun-Tastic," PBC was the clear choice for those seeking high-end amenities, upscale residential communities, and a stronger alignment with affluent lifestyles. PBC's position as a premier luxury destination makes it a more desirable long-term home for high-net-worth individuals and families looking for exclusivity and financial benefits.

For visitation, Jacksonville + St. Augustine performed well among history and family-oriented segments, particularly "Across the Ages" and "Cosmopolitan Achievers," who appreciate the area's rich cultural heritage and coastal appeal. However, PBC remained the preferred travel destination for high-net-worth individuals and those seeking refined leisure experiences, as seen with "Golf Carts and Gourmets" and "Sophisticated City Dwellers." While Jacksonville + St. Augustine offer historical charm and a more affordable coastal lifestyle, PBC's upscale offerings, year-round luxury appeal, and premier recreational experiences position it as the stronger choice for both luxury travelers and long-term residents.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC for its exclusivity, elite social scene, and high-end estate lifestyle.
	Platinum Prosperity	PBC	PBC	PBC wins for both visiting and living due to its stable high-net-worth lifestyle, tax advantages, and refined luxury.
	Kids and Cabernet	PBC	PBC	PBC is the clear choice for both visiting and living, with its upscale suburban setting, top schools, and family-friendly atmosphere.
	Picture Perfect Families	PBC	PBC	PBC offers the best mix of affluence, safety, and high-end suburban communities, making it the preferred place for both visiting and living.
	Couples with Clout	PBC	PBC	PBC remains the top choice for luxury living, high-end leisure, and strong social networking opportunities.
	Jet Set Urbanites	PBC	PBC	PBC is the clear winner for both visiting and living, offering an upscale urban experience with a mix of exclusivity and coastal charm.
FLOURISHING FAMILIES	Across the Ages	Jacksonville + St. Augustine	Jacksonville + St. Augustine	Jacksonville + St. Augustine win as both a travel and living destination due to their historic charm, affordability, and strong community appeal.
	Babies and Bliss	Jacksonville + St. Augustine	Jacksonville + St. Augustine	Jacksonville + St. Augustine are attractive for families seeking a balance of affordability, history, and a welcoming environment.
	Family Fun-Tastic	Jacksonville + St. Augustine	Jacksonville + St. Augustine	Jacksonville + St. Augustine are preferred for both visiting and living due to their family-friendly atmosphere and variety of recreational options.
	Cosmopolitan Achievers	Jacksonville + St. Augustine	Jacksonville + St. Augustine	Jacksonville + St. Augustine appeal to this group for their growing professional opportunities, cultural heritage, and balanced lifestyle.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	Jacksonville + St. Augustine	PBC is the preferred travel destination, but Jacksonville + St. Augustine win for long-term living with their mix of history, affordability, and city vibrancy.
	Golf Carts and Gourmets	PBC	PBC	PBC dominates as the preferred destination for both visiting and living, providing world-class golf courses, fine dining, and a luxurious lifestyle.
	Philanthropic Sophisticates	PBC	PBC	PBC remains the best environment for year-round philanthropic engagement and deep community involvement.
	Boomers and Boomerangs	PBC	PBC	PBC is the clear choice for both visiting and living, offering strong retirement appeal, upscale communities, and a thriving social scene.
	PALM BEACH WINS (OUT OF 14)	10	9	JACKSONVILLE + ST. AUGUSTINE ARE HISTORICAL AND COMMUNITY-DRIVEN DESTINATIONS, THOUGH PBC IS PREFERRED FOR ITS ELITE LIFESTYLE AND REFINED LIVING.

BENCHMARKING LESSONS

Palm Beach County can draw from Jacksonville and St. Augustine's strengths in heritage tourism, waterfront activation, and sports tourism to broaden its visitor appeal. St. Augustine's immersive historical experiences—such as reenactments, interactive museums, and colonial-themed events—offer a model for Palm Beach to elevate its own historic assets, like the Flagler Museum and Worth Avenue, through curated storytelling, digital engagement, and live experiences. Jacksonville's NFL presence, The Players Championship, and large-scale college football events demonstrate how expanding sports tourism beyond golf and equestrian sports could attract new high-spending visitors. Additionally, youth and amateur sports facilities in Jacksonville provide a model for Palm Beach to develop tournament-driven sports tourism, filling hotel rooms and increasing visitor spending.

Waterfront development in Jacksonville's Riverwalk and St. Augustine's historic district highlights the impact of activated public spaces in enhancing visitor engagement. Expanding Palm Beach's waterfront offerings with more pedestrian areas, interactive public art, and event-driven activations could create a more dynamic experience. Sustainability efforts in St. Augustine's marine conservation programs and Jacksonville's eco-tourism initiatives provide a framework for expanding Palm Beach's conservation-based tourism, particularly in the Everglades and along its coastline. The adoption of smart tourism tools—such as interactive wayfinding, and AR history tours—could modernize visitor engagement and create a more seamless experience across Palm Beach County's attractions.

While these strategies offer opportunities for growth, Palm Beach County must retain its distinct identity compared to Jacksonville and St. Augustine. Unlike Jacksonville's sports-driven urban appeal or St. Augustine's colonial heritage focus, Palm Beach should continue positioning itself as a refined, luxury destination that integrates culture, wellness, and high-end experiences with sustainability and history-driven tourism. By enhancing interactive visitor engagement, diversifying waterfront and event tourism, and expanding conservation-focused experiences, Palm Beach can evolve with changing visitor expectations while maintaining its reputation as an elegant and experience-rich coastal destination.



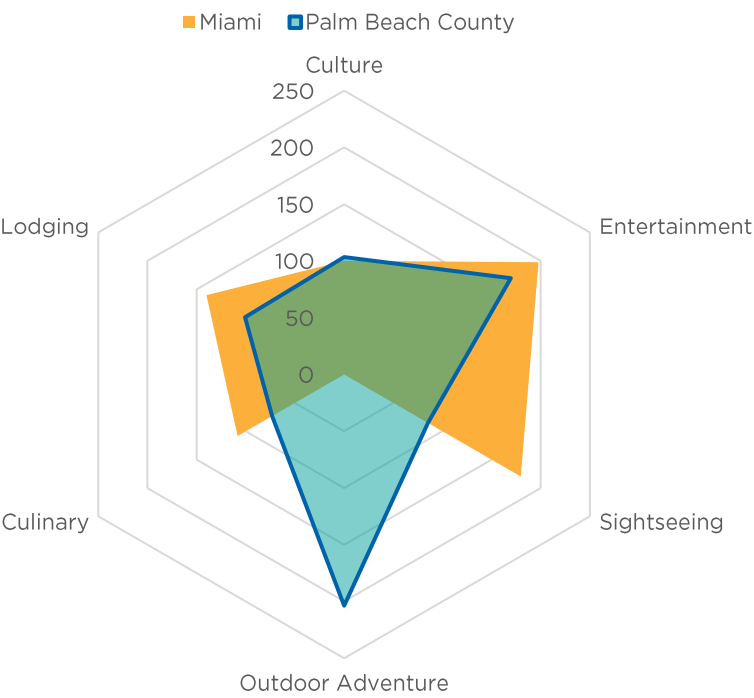
MIAMI FLORIDA



MIAMI FLORIDA

Miami is a major tourism destination, recognized for its diverse cultural offerings, luxury accommodations, and vibrant arts scene. The city's appeal extends from its iconic beaches and historic neighborhoods to its high-end resorts and international events. Miami attracts a broad spectrum of visitors, including leisure travelers, business professionals, and cultural enthusiasts. As the city continues to develop, examining its tourism landscape provides insights into its strengths, challenges, and areas of growth.

\$49,365,000 <i>(GREATER MIAMI CVB)</i>	12.00% <i>(6.00% COUNTY & 6.00% STATE)</i>	39.7 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



STRONG GLOBAL BRAND / IDENTITY



EVENT-DRIVEN TOURISM



MULTICULTURAL HIGHLIGHTS FOCUS

OVERALL TAKEAWAYS

- **Luxury and Outdoor Recreation** – Miami blends luxury resorts with a dynamic urban setting. High-end destinations like Faena District, Bal Harbour, and Fisher Island attract affluent visitors, while outdoor activities range from watersports in Biscayne Bay to Everglades eco-tours and urban parks like Bayfront Park and the Underline.
- **Cultural and Festivals** – Miami’s multicultural identity is showcased through Art Basel, Calle Ocho Festival, Miami Carnival, and the South Beach Wine & Food Festival, reinforcing its status as an arts and entertainment hub.
- **Wellness and Experiences** – The city’s wellness tourism includes luxury spas at The Standard and Carillon Miami, wellness-focused hotels like 1 Hotel South Beach, and fitness experiences such as rooftop yoga and waterfront cycling.
- **Sustainability and Transit** – Initiatives like Resilient305 and the Green Lodging program promote sustainability, while Brightline rail expansion, enhanced bike infrastructure, and electric water taxis offer room for growth in eco-friendly transit.
- **High-Value Visitor Draws** – Miami attracts affluent travelers through luxury hotels like The Setai and St. Regis Bal Harbour, shopping in the Design District, Michelin-starred restaurants, and major events like the Formula 1 Miami Grand Prix and Art Basel. Expanding options for families and older travelers could broaden its luxury appeal.
- **Infrastructure and Safety** – Investments in the Miami Beach Convention Center, airport modernization, and pedestrian-friendly zones in Coconut Grove and Wynwood enhance accessibility, though safety perception and transit improvements remain key priorities.
- **Future Growth** – Miami is expanding its digital reach through the “Find Your Miami” campaign, AI-driven travel tools, and AR/VR experiences to better engage visitors before they arrive.
- **Competing with Palm Beach** – Miami offers cosmopolitan vibrancy, international culture, and nightlife, while Palm Beach focuses on exclusivity, historic elegance, and a quieter retreat atmosphere. Miami attracts younger, global travelers and event-driven visitors, while Palm Beach appeals more to legacy wealth, golf tourism, and secluded luxury.

PRIMARY ASSETS

Miami stands out for its unique blend of luxury, culture, and natural beauty, making it a top destination for both leisure and business tourism. Its beaches, particularly South Beach, are among the most iconic in the world, drawing visitors seeking both relaxation and a lively atmosphere. Beyond the beaches, Wynwood Walls' street art, the cultural vibrancy of Little Havana, and historic districts like the Art Deco Historic District in Miami Beach add depth to the city's tourism appeal. Miami's reputation as a major events destination is cemented by global spectacles like the Miami Open, Art Basel, Ultra Music Festival, and the Formula 1 Miami Grand Prix, all of which bring high-profile visitors and international media coverage.

The city also leads in the luxury resort market, with iconic beachfront hotels like The Setai, Faena, and St. Regis Bal Harbour, offering high-end accommodations and exclusive experiences. The Design District, Bal Harbour Shops, and Brickell City Centre serve as premier shopping destinations, catering to an affluent international clientele. While Miami is famous for its nightlife, wellness tourism is on the rise, with resorts like Carillon Miami and 1 Hotel South Beach emphasizing health and sustainability. On the natural side, Miami offers beach and water-based recreation, including yacht charters, deep-sea fishing, and diving at Biscayne National Park, but it has room to expand its land-based outdoor offerings to attract eco-tourists and adventure travelers. Large-scale events like the Miami International Boat Show and FIFA World Cup 2026 matches further highlight Miami's capability to host world-class events, reinforcing its status as a diverse and globally significant tourism hub.

Miami and Palm Beach County share world-class beaches, high-end resorts, and a strong luxury market, attracting affluent travelers and international visitors. Both destinations benefit from boating and waterfront experiences, with Miami's yachting industry and marinas paralleling Palm Beach's boating and equestrian culture. However, Miami is a high-energy, cosmopolitan city known for its international culture, nightlife, and large-scale global events, while Palm Beach County offers a quieter, more exclusive retreat, with historic resorts like The Breakers and a focus on heritage luxury and private clubs. Miami's multicultural identity, shaped by Latin American, Caribbean, and European influences, fuels its food, music, and arts scene, whereas Palm Beach County has a more traditional, U.S.-dominated visitor base, emphasizing heritage tourism and golf-oriented experiences. Miami hosts globally recognized events like Art Basel, the Formula 1 Miami Grand Prix, and the upcoming FIFA World Cup, while Palm Beach County excels in equestrian competitions, golf tournaments, and elite social events, such as the Winter Equestrian Festival and The Cognizant Classic. Visitor demographics also differ—Miami attracts a younger, event-driven, and international crowd, while Palm Beach County caters more to older, wealthier visitors seeking privacy, relaxation, and long-term stays. These contrasts illustrate how Miami leverages global appeal, energy, and large-scale events, whereas Palm Beach County focuses on heritage luxury, exclusivity, and a refined coastal lifestyle.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Miami is expanding its wellness and medical tourism sector with luxury resorts like Carillon Miami and The Standard offering holistic health programs, hydrotherapy, and recovery-focused treatments. Additionally, facilities like Miami Cancer Institute and UHealth Sports Medicine are well-positioned to attract medical tourists seeking specialized treatments and wellness retreats.

Immersive and Transformative Experiences: Miami is integrating AR/VR technology into attractions like the Phillip and Patricia Frost Museum of Science, which offers interactive digital exhibits, and Superblue Miami, an immersive art experience using projection mapping and sensory elements. Expanding these technologies at sites like Vizcaya Museum and Gardens could enhance cultural tourism.

Authenticity and Cultural Enrichment: Miami's Little Havana Cultural Walking Tours, the Black History and Heritage Trail, and expanded programming at The Historic Hampton House are strengthening heritage tourism. The city is also investing in multicultural events and culinary festivals, such as Calle Ocho Festival and Haitian Compas Festival, to provide deeper engagement with Cuban, Caribbean, and Latin American culture.

Sustainability: Miami is implementing green tourism initiatives, including electric water taxis, eco-certified hotels through the Green Lodging Program, and expanded Brightline rail service to reduce carbon footprints. The city is also growing its eco-tourism sector with sustainable tours in Everglades National Park, Biscayne National Park, and Oleta River State Park, promoting responsible outdoor experiences.

Entertainment and 'Eatertainment': Miami is advancing its dining-entertainment fusion with venues like The Wharf Miami, CHICA, and Joia Beach, which combine live performances, interactive dining, and waterfront experiences. Expanding this, projects like the newly built Julia & Henry's food hall in Downtown Miami are creating multi-sensory culinary spaces that attract global foodies.

Outdoor Adventure and Sports: While Miami dominates in water-based activities, it is expanding its land-based adventure offerings, such as improvements and expansions at Zoo Miami, which will introduce eco-friendly outdoor experiences. Additionally, the development of bike-friendly trails in The Underline and Virginia Key Mountain Bike Park is enhancing Miami's appeal to active travelers.

Content Creation: Visit Miami actively partners with travel influencers and social media campaigns like "Found in Miami", leveraging iconic locations such as Wynwood, South Beach, and the Design District to encourage user-generated content. Programs like Miami Temptations promote seasonal tourism themes through social media contests and influencer collaborations.

Inclusivity: Miami continues to promote LGBTQ+ tourism through campaigns like "Rainbow Spring" and partnerships with Pride events, LGBTQ+-owned businesses, and inclusive hospitality training. The city also prioritizes accessibility enhancements, such as beach wheelchairs, sensory-friendly museum experiences, and ADA-compliant attractions.

Multi-Generational Appeal: Miami offers family-friendly attractions like Zoo Miami, Jungle Island, and the Miami Seaquarium, while resorts such as Loews Miami Beach provide kid-friendly amenities and family concierge services. The city is also expanding multi-generational vacation packages, including family tours of Everglades National Park and Miami Marlins baseball experiences, to cater to diverse age groups.

MIAMI FUTURE TOURISM STRATEGIES

Miami's future tourism strategy will focus on key initiatives aimed at strengthening its position as a diverse and sustainable destination. Sustainability will play a larger role, with planned expansions in eco-certified hotels, electric water taxis, and renewable energy integration in hospitality developments. Initiatives such as enhanced recycling programs in major tourism districts and incentives for sustainable business practices could attract eco-conscious travelers. Transportation improvements will also be critical, with ongoing investments in Brightline rail expansion, expanded bike lanes, and pedestrian-friendly urban design in areas like The Underline and Downtown Miami to reduce congestion and encourage sustainable mobility.

Cultural tourism will continue to be a focal point, with future projects aiming to highlight Miami's multicultural heritage beyond the beach. Plans to develop interactive museums, expanded historic preservation efforts in neighborhoods like Overtown and Little Haiti, and augmented reality-enhanced city tours could provide visitors with deeper engagement in Miami's history and arts scene. The wellness sector is also expected to grow, with opportunities to expand medical tourism partnerships with UHealth and Baptist Health South Florida, offering specialized programs for post-surgical recovery, longevity treatments, and holistic wellness retreats.

Digital marketing and visitor engagement strategies will be enhanced through AI-driven personalization, immersive virtual experiences showcasing Miami's attractions, and influencer-driven campaigns targeting diverse travel segments. Additionally, infrastructure investments will focus on resiliency planning to protect key tourism areas from climate impacts, including flood mitigation in Miami Beach and storm-resistant urban design. Safety and security enhancements will include increased surveillance technology in high-traffic areas, expanded community policing efforts in tourism districts, and improved emergency response systems to maintain Miami's reputation as a welcoming and secure destination.

HIGH VALUE VISITOR PREFERENCES: MIAMI VS. PALM BEACH COUNTY

Palm Beach County outperformed Miami as the preferred place to live among most Mosaic segments, particularly those seeking exclusivity, wealth-friendly policies, and a more refined luxury lifestyle. Segments such as "American Royalty," "Platinum Prosperity," and "Golf Carts and Gourmets" overwhelmingly favored PBC for its estate communities, privacy, and high-end leisure offerings. While Miami attracted "Jet Set Urbanites," "Cosmopolitan Achievers," and "Sophisticated City Dwellers" for its vibrant nightlife, international business appeal, and fast-paced urban environment, PBC's more relaxed yet prestigious atmosphere made it the stronger choice for long-term affluent residents looking for financial benefits and a sophisticated coastal lifestyle.

For visitation, Miami had a strong draw among younger, high-energy segments like "Jet Set Urbanites" and "Across the Ages," who were drawn to its nightlife, entertainment, and global cultural scene. However, PBC was the preferred destination for most luxury-seeking and family-oriented segments, including "Philanthropic Sophisticates" and "Family Fun-Tastic," who valued its upscale resorts, golf courses, and refined leisure experiences. While Miami thrives as an international travel hub with a cosmopolitan edge, PBC remains the dominant choice for those prioritizing exclusivity, relaxation, and high-end living, making it the more attractive destination for affluent travelers and residents alike.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Miami	PBC	Visits Miami for its high-energy luxury scene but prefers PBC for its privacy, estates, and financial advantages.
	Platinum Prosperity	PBC	PBC	PBC wins for both visiting and living due to its wealth-friendly environment and more relaxed yet luxurious lifestyle.
	Kids and Cabernet	PBC	PBC	PBC is the top choice for both visiting and living due to its suburban luxury, excellent schools, and family-friendly environment.
	Picture Perfect Families	PBC	PBC	PBC offers the ideal balance of affluence, safety, and well-developed suburban communities.
	Couples with Clout	Miami	PBC	Miami is an attractive getaway with world-class dining and nightlife, but PBC offers a more refined and relaxed luxury experience.
	Jet Set Urbanites	Miami	Miami	Miami is the ultimate destination for both visiting and living due to its fast-paced, cosmopolitan, and high-energy environment.
FLOURISHING FAMILIES	Across the Ages	Miami	PBC	Miami provides a lively travel experience, but PBC is the preferred home for its multi-generational appeal and strong community ties.
	Babies and Bliss	PBC	PBC	PBC is the best environment for raising young families, with top schools, safe communities, and an ideal balance of luxury and suburban comfort.
	Family Fun-Tastic	PBC	PBC	PBC offers the best mix of family-oriented activities and suburban convenience, making it the preferred destination for both visiting and living.
	Cosmopolitan Achievers	Miami	Miami	Miami attracts this group for its cultural vibrancy, nightlife, and international business scene, making it the preferred place to live.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	Miami	PBC is an attractive place to visit, but Miami wins for long-term living with its urban excitement and dynamic city life.
	Golf Carts and Gourmets	PBC	PBC	PBC is the clear winner for both visiting and living, offering premier golf courses, fine dining, and a relaxed yet high-end leisure experience.
	Philanthropic Sophisticates	PBC	PBC	PBC offers the best environment for year-round philanthropic engagement and deep community connections.
	Boomers and Boomerangs	Miami	PBC	Miami is an exciting travel destination, but PBC is the preferred place to live for its upscale, multi-generational communities and leisure-focused lifestyle.
	PALM BEACH WINS (OUT OF 14)	8	11	MIAMI IS A HIGH-ENERGY INTERNATIONAL HUB FOR TRAVEL AND BUSINESS, YET PBC IS THE BETTER CHOICE FOR UPSCALE, PRIVATE LUXURY LIVING.

BENCHMARKING LESSONS

Miami's tourism success provides key insights that can inform Palm Beach County's future strategy, particularly in destination branding, event-driven tourism, cultural engagement, and sustainability initiatives. One of Miami's strongest assets is its global brand identity, which leverages its multicultural heritage, high-energy entertainment scene, and luxury appeal. Palm Beach County can benefit from a more defined and cohesive brand strategy that highlights its unique blend of heritage luxury, coastal elegance, and world-class leisure activities while reinforcing its reputation as a premier destination. Miami also thrives on event-driven tourism, hosting internationally recognized gatherings such as Art Basel, Formula 1 Miami Grand Prix, and Ultra Music Festival. While Palm Beach County already attracts equestrian events, golf tournaments, and philanthropic galas, expanding its event portfolio with high-end art, wellness, and culinary festivals could further boost visitation and engagement.

Miami's focus on cultural tourism and immersive experiences has set it apart from other destinations, offering interactive experiences in Little Havana, Wynwood, and the Design District. Palm Beach County can enhance its own cultural tourism strategy by elevating its historic districts, fine arts scene, and local heritage through curated experiences and destination storytelling. Additionally, Miami's sustainability initiatives, such as electric water taxis, eco-friendly hotels, and transit-oriented development, offer inspiration for Palm Beach County to integrate green infrastructure, improve pedestrian connectivity, and expand eco-conscious tourism offerings. However, while learning from Miami, Palm Beach County must maintain its distinct identity as a refined, serene, and heritage-driven luxury destination. By emphasizing its exclusivity, slower-paced luxury, and strong community-driven appeal, Palm Beach County can carve out a complementary yet differentiated position in Florida's tourism landscape.



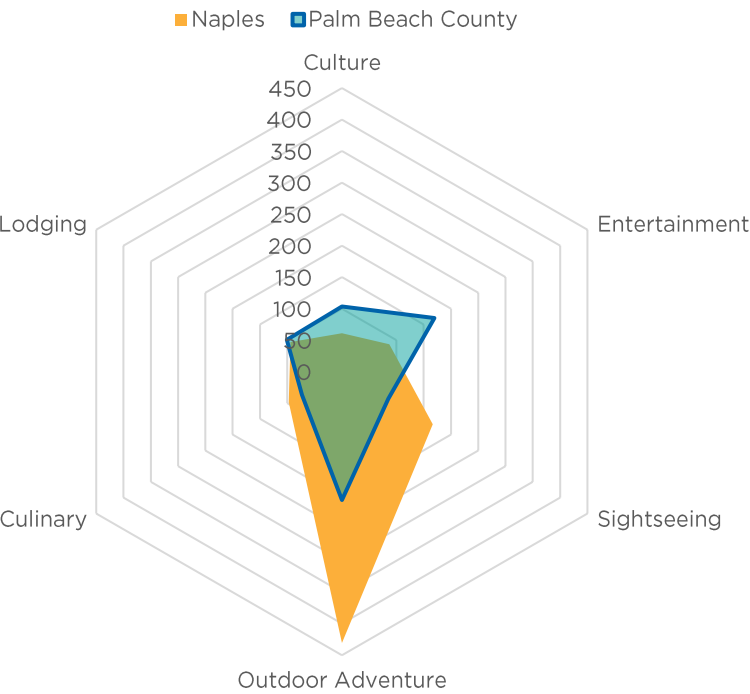
NAPLES FLORIDA



NAPLES FLORIDA

Naples, Florida, is a premier luxury coastal destination known for its high-end resorts, world-class golf courses, and access to unique eco-tourism experiences in the Everglades. It appeals to affluent retirees, second-home buyers, cultural tourists, and eco-conscious luxury travelers, positioning itself as an elite yet laid-back alternative to other Florida luxury markets.

\$34,134,000 <i>(COLLIER COUNTY TOURISM PROMOTIONAL BUDGET)</i>	11.00% <i>(5.00% COUNTY & 6.00% STATE)</i>	15.7 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



ULTRA-HIGH-END LUXURY

OUTDOOR ADVENTURE

SUSTAINABILITY FOCUSES

NAPLES FLORIDA

OVERALL TAKEAWAYS

- **Luxury & Exclusivity** – Naples thrives on its ultra-high-end resorts, fine dining, and waterfront estates, attracting affluent visitors and second homeowners.
- **Cultural & Arts Appeal** – Naples is home to Artis-Naples, The Baker Museum, and elite performing arts, making it a significant cultural hub.
- **Eco-Tourism & Sustainability** – With proximity to Everglades National Park, Naples integrates luxury with conservation-driven tourism.
- **Golf & Leisure Lifestyle** – Naples markets itself as a golf paradise, with exclusive private clubs and PGA-hosting courses.
- **Wellness & Medical Tourism** – High-end spas, longevity retreats, and integrative health centers make wellness a core tourism component.
- **Multi-Generational & Family Appeal** – Naples attracts affluent families seeking a mix of relaxation, outdoor adventure, and cultural enrichment.
- **Competition with Palm Beach County** – Naples offers a quieter, highly curated luxury experience, while Palm Beach County is more socially dynamic and diverse in visitor segments.

PRIMARY ASSETS

Naples' reputation as a premier luxury destination is built upon its integration of high-end experiences, cultural refinement, and exclusive outdoor leisure. Its world-class golf courses, such as Tiburón Golf Club, which hosts the PGA Tour's QBE Shootout, place it in direct competition with Palm Beach County's strong golf tourism sector. Beyond golf, Naples' culinary scene is another defining asset, featuring Michelin-level dining and premier food events like the Naples Winter Wine Festival, one of the nation's most prestigious charity wine auctions. These offerings position Naples as an elite culinary destination for affluent travelers who seek both fine dining and curated gastronomic experiences.

In addition to luxury hospitality and dining, Naples boasts an impressive cultural landscape anchored by Artis-Naples, home to The Baker Museum and the Naples Philharmonic. These institutions attract high-net-worth cultural tourists seeking world-class performances and exhibitions. Naples also maximizes its waterfront appeal through luxury yacht charters, sunset cruises, and exclusive boating experiences from Port of Naples Marina, reinforcing its identity as a haven for affluent second-home buyers and boating enthusiasts. Additionally, as a gateway to the Everglades, Rookery Bay, and the Ten Thousand Islands, Naples has successfully integrated eco-tourism into its luxury tourism strategy. Through high-end airboat tours, private conservation experiences, and nature-focused luxury retreats, the city appeals to travelers who desire sustainability-driven yet exclusive outdoor experiences.

While Palm Beach County shares many of Naples' strengths—luxury accommodations, world-class golf, and an affluent visitor base—the two destinations diverge in their brand positioning. Naples offers a quiet, secluded, and highly curated luxury experience, whereas Palm Beach County balances social vibrancy, high-profile events, and a more diverse range of visitor demographics. This difference presents Palm Beach with an opportunity to expand its eco-tourism branding and deepen its engagement with ultra-high-net-worth wellness and cultural travelers.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Naples is expanding its appeal to wellness travelers by increasingly offering spa retreats, beachside wellness programs, and holistic health services at resorts like The Ritz-Carlton, Naples.

Immersive Experiences: Naples is responding to the growing demand for immersive tourism by integrating art, technology, and community engagement into its cultural events. The city enhances visitor engagement through public art installations and plans to expand interactive experiences.

Authenticity and Cultural Enrichment: Naples showcases its rich maritime heritage and local history through landmarks like the Naples Historical Society and the Naples Depot Museum. The city is enhancing its cultural offerings with interactive historical tours and local art exhibitions that allow visitors to engage more deeply with its history and culture, fostering a stronger connection to the destination.

Eatertainment and Premium Event Experiences: Naples offers a variety of dining experiences that combine gourmet cuisine with entertainment. The city hosts premium events such as the Naples Winter Wine Festival, which features exclusive wine tastings and auctions, attracting connoisseurs and collectors.

Outdoor Adventure and Sports: Naples capitalizes on its natural surroundings to offer a range of outdoor activities. Pure Florida, a family-owned business, provides boat tours, fishing charters, jet ski rentals, and eco-tours, allowing visitors to explore the region's waterways. The Paradise Coast Sports Complex, a state-of-the-art facility, offers multi-use fields, a stadium, and sand volleyball courts, hosting various sports events and attracting a younger demographic.

Multi-Generational Appeal: Naples offers a range of family-friendly experiences, from the Golisano Children's Museum of Naples to interactive parks and Naples Beach. The city caters to multi-generational travel with family-oriented resorts and activities that appeal to all ages, encouraging longer stays and repeat visits

FUTURE TOURISM STRATEGIES

Naples is actively positioning itself as a leader in high-end tourism, with an emphasis on luxury wellness, longevity tourism, cultural enrichment, and modernizing its brand appeal through digital innovations. The city is increasingly recognized for its refined coastal lifestyle and appeal to ultra-affluent travelers, who seek exclusivity, relaxation, and world-class amenities. While Naples benefits from its proximity to protected natural areas like Rookery Bay and Everglades National Park, it does not market itself heavily as a sustainability-driven destination but rather as a haven for privacy, leisure, and sophisticated experiences in a coastal setting.

The city is also recognizing the increasing demand for wellness-focused travel, making it a prime market for high-net-worth individuals seeking health-driven experiences. Naples is home to renowned luxury resorts, such as The Ritz-Carlton, Naples, which offer extensive spa and wellness services catering to affluent guests. As the global wellness industry expands, Naples has an opportunity to continue developing high-end wellness retreats that integrate traditional spa offerings with holistic wellness programs. Expanding wellness tourism with tailored luxury spa experiences, guided mindfulness programs, and resort-based health and wellness initiatives could position Naples as a premier destination for relaxation and well-being-focused travel.

Cultural tourism is another area where Naples is looking to grow, leveraging its existing reputation for world-class arts and entertainment. Artis-Naples and The Baker Museum already serve as premier cultural institutions, but the city has the potential to further enhance its arts scene by expanding cultural programming and hosting exclusive art events. Efforts to develop more high-profile art exhibitions and international collaborations would elevate Naples' status as a luxury arts tourism destination, attracting collectors, curators, and high-end cultural patrons.

To remain competitive in the luxury travel market, Naples is also modernizing its branding by adopting AI-driven digital marketing strategies and immersive digital storytelling. The city is leveraging targeted social media campaigns, high-end content marketing, and enhanced digital engagement tools to attract affluent travelers seeking personalized experiences. Naples' ability to curate luxury-focused digital campaigns and promote its high-end offerings through sophisticated branding efforts will be critical to maintaining its reputation as a premier luxury destination in Florida. By aligning wellness tourism, cultural refinement, and digital innovation, Naples is ensuring it continues to attract discerning travelers from around the world.

HIGH VALUE VISITOR PREFERENCES: NAPLES VS. PALM BEACH COUNTY

Palm Beach County outperformed Naples as the preferred place to live for most Mosaic segments, particularly those seeking a dynamic luxury lifestyle with greater access to high-end amenities, networking opportunities, and financial advantages. Segments such as "American Royalty," "Platinum Prosperity," and "Philanthropic Sophisticates" overwhelmingly chose PBC for its exclusive estate communities, robust high-net-worth social scene, and broader cultural and recreational offerings. While Naples was preferred by "Boomers and Boomerangs" as a quieter, more retirement-friendly destination, PBC's combination of financial incentives, luxury real estate, and elite social circles made it the stronger choice for affluent individuals and families looking for an active, year-round high-end lifestyle.

For visitation, Naples attracted interest primarily from "Across the Ages" and "Couples with Clout," who were drawn to its relaxed coastal environment and high-end yet low-key atmosphere. However, PBC remained the dominant choice among luxury travelers, with segments such as "Golf Carts and Gourmets" and "Sophisticated City Dwellers" favoring its world-class resorts, golf courses, and vibrant cultural scene. While Naples appeals to those seeking a serene, resort-like experience, PBC offers a more diverse, year-round luxury destination that caters to both high-net-worth individuals and families seeking an upscale yet engaging lifestyle.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Naples	PBC	Visits Naples for its quiet luxury and exclusivity but prefers PBC for its financial benefits, larger estate properties, and elite social circles.
	Platinum Prosperity	Naples	PBC	Naples offers a high-end, relaxed coastal experience for travel, but PBC provides a more dynamic, wealth-friendly, and prestigious place to live.
	Kids and Cabernet	PBC	PBC	PBC is the top choice for both visiting and living, offering an upscale suburban setting, top-tier schools, and family-friendly amenities.
	Picture Perfect Families	PBC	PBC	PBC provides the perfect mix of affluence, safety, and a strong family-oriented community, making it the preferred choice for both visiting and living.
	Couples with Clout	Naples	PBC	Naples is an attractive travel destination for its refined leisure and coastal appeal, but PBC offers a more balanced and prestigious long-term lifestyle.
	Jet Set Urbanites	PBC	PBC	PBC wins as both the preferred travel and living destination due to its vibrant urban offerings, international accessibility, and exclusive social scene.
FLOURISHING FAMILIES	Across the Ages	Naples	PBC	Naples offers a relaxing, high-end vacation experience, but PBC is the preferred choice for living due to its multi-generational appeal and dynamic lifestyle.
	Babies and Bliss	PBC	PBC	PBC is ideal for raising young families, providing excellent schools, safe neighborhoods, and access to a range of family-friendly activities.
	Family Fun-Tastic	PBC	PBC	PBC wins as the preferred destination for both visiting and living, offering a balanced suburban atmosphere with ample family recreational opportunities.
	Cosmopolitan Achievers	Naples	PBC	Naples offers an elegant retreat for travel, but PBC provides a stronger professional and social network for long-term living.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Naples	PBC	Naples provides an appealing travel destination for those who enjoy a quieter, upscale setting, but PBC is a more active and well-rounded place to live.
	Golf Carts and Gourmets	PBC	PBC	PBC dominates as the preferred destination for both visiting and living, providing world-class golf courses, fine dining, and a luxurious leisure lifestyle.
	Philanthropic Sophisticates	Naples	PBC	Naples is a great place for philanthropic retreats and elite networking, but PBC offers deeper, year-round community involvement and giving opportunities.
	Boomers and Boomerangs	PBC	Naples	PBC is the preferred travel destination, but Naples wins as the ideal place for retirees seeking a relaxed, community-driven coastal lifestyle.
	PALM BEACH WINS (OUT OF 14)	7	13	NAPLES IS A REFINED AND RELAXING TRAVEL DESTINATION FOR RETIREES, BUT PBC OFFERS A MORE DYNAMIC AND PRESTIGIOUS LONG-TERM HOME.

BENCHMARKING LESSONS

Naples has distinguished itself as a quiet, exclusive retreat for ultra-high-net-worth travelers, excelling in seamless luxury, cultural sophistication, and high-end eco-tourism. Its focus on wellness, sustainability, and second-home ownership has made it a preferred destination for affluent visitors seeking a refined, laid-back experience with an emphasis on privacy and conservation. In contrast, Palm Beach County offers a more socially vibrant, event-driven, and diverse tourism market, attracting high-profile socialites, business executives, and luxury travelers who thrive in an engaging atmosphere. While both destinations share strengths in luxury accommodations, golf, and waterfront living, Naples' emphasis on exclusivity and conservation-driven tourism sets it apart from Palm Beach's dynamic mix of high-end lifestyle, social +vibrancy, and event tourism.

To compete more effectively, Palm Beach County can draw inspiration from Naples' success in luxury wellness and longevity travel by expanding its offerings in elite wellness retreats, longevity-focused experiences, and high-end medical tourism. Developing integrative wellness resorts that combine spa, medical, and holistic treatments would allow Palm Beach to appeal to the growing market of affluent travelers seeking transformative health experiences. Additionally, Naples' success in eco-tourism and conservation-driven luxury travel suggests an opportunity for Palm Beach County to further develop its marine conservation tourism, VIP eco-yacht tours, and guided nature excursions that blend sustainability with high-end experiences. Strengthening arts and cultural tourism through VIP art weekends, philanthropy-driven cultural experiences, and exclusive exhibitions would also enhance Palm Beach's appeal to affluent visitors who seek luxury travel infused with cultural enrichment.

Palm Beach County can further differentiate itself by expanding its high-end yachting and waterfront lifestyle tourism, introducing luxury yacht charters, curated waterfront dining experiences, and ultra-luxury marina developments that rival Naples' private boating scene. Additionally, enhancing multi-generational luxury tourism through curated family travel packages, high-end adventure excursions, and private resort experiences would position Palm Beach as a more socially engaging and dynamic luxury destination that offers something for every age group.

While Naples thrives as a quiet and refined luxury retreat, Palm Beach County's strength lies in its high-energy, event-rich atmosphere and socially connected luxury lifestyle. To maintain its individual identity, Palm Beach should continue leveraging its vibrant events, high-profile networking opportunities, and status as a hub for international luxury travelers while incorporating lessons from Naples in wellness tourism, eco-conscious luxury, and curated exclusivity. By refining its ultra-luxury tourism strategy while enhancing its focus on sustainability and wellness, Palm Beach County can not only compete with Naples but also further establish itself as Florida's premier destination for affluent travelers seeking both exclusivity and high-energy luxury experiences.



NEWPORT

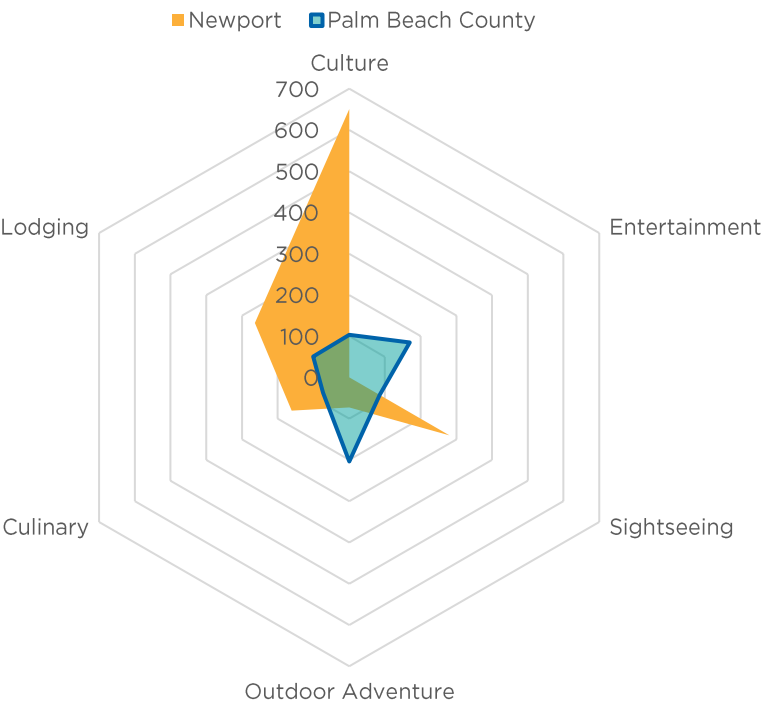
RHODE ISLAND



NEWPORT RHODE ISLAND

Newport, Rhode Island, is a coastal destination known for its Gilded Age mansions, sailing industry, historic sites, and cultural events. The city attracts travelers interested in history, maritime activities, and heritage tourism. With a long-standing focus on luxury travel, regattas, and boutique hospitality, Newport has incorporated experiential tourism, specialized events, and sustainability initiatives into its tourism economy.

\$5,425,800 <i>(NEWPORT/BRISTOL COUNTY CVB)</i>	13.00% <i>(1.00% TOWN, 7.00% STATE & 5.00% HOTEL TAX)</i>	3.2 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



ULTRA LUXURY



HISTORIC MANSIONS



PREMIUM EVENTS

NEWPORT RHODE ISLAND

OVERALL TAKEAWAYS

- **Luxury & Elite Appeal** – Newport is home to prestigious yachting culture, historic estates, and high-end boutique tourism, making it a preferred destination for affluent travelers.
- **Historic & Architectural Tourism** – The city’s Gilded Age mansions, preserved colonial districts, and historic landmarks create a unique tourism draw that is difficult to replicate elsewhere.
- **Maritime & Sailing Capital** – As a global yachting hub, Newport’s sailing culture and events like the Newport Bermuda Race reinforce its maritime prestige.
- **Cultural & Music Tourism** – Home to the Newport Jazz Festival and Newport Folk Festival, Newport continues to attract cultural tourists seeking high-end, intimate music experiences.
- **Boutique Conference & High-End Event Destination** – Newport has positioned itself as a niche conference and corporate retreat destination, leveraging its luxury hotels, waterfront venues, and historic estates.
- **Competing with Palm Beach County** – While Palm Beach County thrives as a year-round luxury destination with high-profile social events and golf tourism, Newport offers a seasonal, heritage-driven experience with an emphasis on elite sailing and cultural tourism.

PRIMARY ASSETS

Newport’s tourism ecosystem is defined by its historic charm, maritime prestige, and exclusive leisure experiences, making it one of the most distinctive destinations in the United States. The city’s Gilded Age mansions, including The Breakers, Marble House, and Rosecliff, serve as architectural marvels that attract visitors interested in high society history and luxury heritage tourism. These estates have been transformed into event venues, immersive tour experiences, and cultural hubs, offering everything from historic re-enactments to exclusive fine dining events within the grandeur of their original settings.

Beyond its historic appeal, Newport is recognized as the “Sailing Capital of the World,” hosting prestigious events such as the Newport Bermuda Race, the Rolex New York Yacht Club Invitational Cup, and the Newport International Boat Show. These regattas and yachting events draw an elite crowd, reinforcing Newport’s reputation as an affluent, maritime-driven destination. The city’s luxury boutique hotels, high-end shopping districts, and intimate conference venues further support a high-value visitor economy, making it a premier location for upscale travelers, private corporate retreats, and exclusive social gatherings.

Newport’s music and cultural festivals also contribute to its strong tourism appeal. Events such as the Newport Jazz Festival and the Newport Folk Festival have cemented the city’s reputation as a hub for world-class cultural experiences, attracting both music lovers and high-profile celebrities.

Meanwhile, its Concours & Motor Week event has positioned Newport as a rising competitor in the luxury automotive tourism space, bringing in high-net-worth car collectors and enthusiasts. These assets allow Newport to differentiate itself from other luxury destinations, offering a mix of history, culture, and elite recreation that appeals to a sophisticated traveler demographic.

RESPONDING TO TRENDS

Luxury Wellness & Boutique Retreats: Newport's luxury hotels and boutique resorts emphasize wellness through private spa treatments, mindfulness experiences, and coastal retreat packages. Properties like The Vanderbilt and Gurney's Newport Resort offer high-end spa and wellness programs tailored to affluent visitors.

Heritage-Driven Experiential Tourism: Newport has successfully transformed its Gilded Age mansions into immersive tourism experiences, offering private estate tours, historical re-enactments, and intimate luxury events in historic settings. These experiences attract high-net-worth visitors seeking both cultural enrichment and exclusivity.

Authenticity and Cultural Enrichment: Newport's historical and cultural offerings provide an opportunity for visitors to connect with the city's maritime heritage, architectural legacy, and artistic traditions. The Newport Jazz Festival and Newport Folk Festival highlight the city's musical influence, attracting global artists and culturally engaged audiences. Additionally, local museums such as the Museum of Newport History and The Sailing Museum curate experiences that educate visitors on colonial trade, naval history, and the evolution of Newport's maritime industry. The city's commitment to preserving and interpreting its past has strengthened its reputation as a destination for cultural tourism and historical education.

Sustainability: Newport has made strides in sustainable tourism and environmental conservation, particularly within its maritime sector. Many of the city's yacht clubs and regatta events incorporate eco-friendly practices, including clean regattas that reduce plastic waste and promote ocean conservation efforts. The Cliff Walk and Sachuest Point National Wildlife Refuge provide visitors with access to scenic coastal areas while maintaining strict conservation guidelines. Additionally, initiatives such as waterfront clean-up programs and the promotion of sustainable seafood through local restaurants reinforce Newport's investment in preserving its natural environment while still catering to high-value visitors.

Luxury Yachting & Maritime Tourism: As the "Sailing Capital of the World," Newport hosts world-renowned regattas, yacht races, and elite maritime events that draw a global audience. The city's focus on high-end sailing experiences and member-based yacht clubs makes it a premier destination for affluent boat owners and maritime enthusiasts.

Exclusive Cultural & Boutique Festival Tourism: Newport attracts sophisticated cultural travelers through intimate, high-end music festivals like the Newport Jazz Festival and Newport Folk Festival, as well as events like the Audrain Newport Concours & Motor Week. These festivals are highly curated and cater to an elite audience, reinforcing Newport's high-value visitor base.

Multi-Generational Luxury Travel: Newport successfully blends heritage, outdoor adventure, and educational tourism, making it attractive to affluent multi-generational travelers. Families enjoy interactive history tours, private sailing excursions, and curated outdoor activities that cater to both parents and children.

FUTURE TOURISM STRATEGIES

Newport is actively working to extend its visitor season beyond the traditional summer peak by expanding off-season tourism offerings and creating new luxury experiences that cater to affluent travelers year-round. The city is developing winter tourism initiatives, including holiday-themed mansion experiences, exclusive seasonal dining events, and curated wellness retreats. Several of Newport's historic estates, such as The Breakers and Rosecliff, are exploring expanded winter programming, offering festive décor tours, intimate fireside dining events, and private holiday galas to attract visitors in the colder months. Hotels and boutique resorts are also introducing coastal wellness retreats, incorporating luxury spa packages, mindfulness programs, and restorative wellness experiences that position Newport as a year-round destination for relaxation and rejuvenation.

Building on its success in exclusive events and boutique festivals, Newport is planning to expand its portfolio of high-end experiences that cater to elite travelers. The city's luxury automotive tourism sector will continue to grow with plans to expand the Audrain Newport Concours & Motor Week by adding private collector showcases, exclusive driving experiences along Ocean Drive, and invite-only automotive investment panels. The city is also considering new VIP cultural experiences, such as private Gilded Age-themed galas within the Newport Mansions, exclusive art auctions featuring rare collections, and curated yacht-based music performances that blend maritime heritage with world-class entertainment. By focusing on invitation-only, ultra-premium events, Newport aims to reinforce its status as a premier luxury destination for high-net-worth individuals.

To enhance its global outreach and digital marketing presence, Newport is expanding its international marketing campaigns, targeting luxury travelers in key markets such as Europe, Asia, and the Middle East. The city is leveraging personalized travel itineraries and immersive virtual previews of its high-end attractions to engage affluent visitors before they arrive. Destination marketing organizations are also working on expanding partnerships with luxury brands, travel influencers, and high-net-worth lifestyle publications to showcase Newport's offerings to new generations of luxury travelers who prioritize exclusive, experience-driven tourism. Through these strategic initiatives, Newport is positioning itself as a year-round luxury destination that blends heritage, culture, and high-end leisure in a way that continues to evolve with changing traveler expectations.

HIGH VALUE VISITOR PREFERENCES: NEWPORT VS. PALM BEACH COUNTY

Palm Beach County outperformed Newport as the preferred place to live for most Mosaic segments, particularly among those seeking year-round luxury, financial advantages, and a more expansive high-end lifestyle. Segments such as "Platinum Prosperity," "Golf Carts and Gourmets," and "Philanthropic Sophisticates" favored PBC for its wealth-friendly policies, exclusive estates, and premier leisure offerings. While Newport was the preferred home for "American Royalty," "Cosmopolitan Achievers," and "Sophisticated City Dwellers" due to its deep-rooted high society traditions, historic charm, and summer-season exclusivity, PBC's greater economic benefits and upscale lifestyle made it the dominant choice for long-term affluent living.

For visitation, Newport performed well among segments that value history and elite social traditions, such as "Philanthropic Sophisticates" and "Sophisticated City Dwellers," who appreciated its historic mansions, sailing culture, and old-money prestige. However, PBC remained the preferred travel destination for most high-net-worth individuals and families, with segments like "Kids and Cabernet" and "Family Fun-Tastic" choosing PBC for its family-friendly luxury, premier golf courses, and cultural events. While Newport thrives as a seasonal retreat with a rich social heritage, PBC offers a broader, year-round luxury experience, making it the more attractive destination for both elite travelers and permanent residents.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Newport	Newport	Newport is preferred for both visiting and living due to its historic mansions, yacht culture, and elite social events.
	Platinum Prosperity	PBC	PBC	PBC wins as both the preferred travel and living destination due to its financial advantages, luxury real estate, and exclusive lifestyle.
	Kids and Cabernet	PBC	PBC	PBC is the top choice for both visiting and living, offering top-tier schools, a high-end suburban setting, and strong family-friendly amenities.
	Picture Perfect Families	PBC	PBC	PBC provides the perfect mix of affluence, safety, and strong family-oriented communities, making it the preferred place for both visiting and living.
	Couples with Clout	PBC	PBC	PBC remains the top choice for luxury living, high-end leisure, and strong social networking opportunities.
	Jet Set Urbanites	PBC	PBC	PBC is the preferred destination for both visiting and living, offering a dynamic, well-connected urban lifestyle with coastal exclusivity.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC is the preferred destination for both visiting and living, offering a multi-generational appeal with luxury and community engagement.
	Babies and Bliss	PBC	Newport	PBC is the preferred travel destination, but Newport offers a quieter, more historic setting, making it a desirable place to live for families.
	Family Fun-Tastic	PBC	Newport	PBC is ideal for visiting, but Newport is preferred for living due to its charming atmosphere and coastal family-friendly appeal.
	Cosmopolitan Achievers	Newport	Newport	Newport offers an exclusive cultural and social environment for both visiting and living, making it the preferred place for this segment.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Newport	Newport	Newport is the preferred place for both visiting and living due to its blend of coastal elegance, culture, and prestige.
	Golf Carts and Gourmets	PBC	PBC	PBC dominates as the preferred destination for both visiting and living, providing world-class golf courses, fine dining, and an elite leisure community.
	Philanthropic Sophisticates	Newport	Newport	Newport is the preferred place for both visiting and living, offering deep historical philanthropic traditions and elite networking opportunities.
	Boomers and Boomerangs	PBC	PBC	PBC remains the top choice for both visiting and living, with strong retirement appeal, upscale communities, and a thriving social scene.
	PALM BEACH WINS (OUT OF 14)	10	8	NEWPORT IS A HISTORIC, HIGH-SOCIETY RETREAT, BUT PBC REMAINS THE BETTER CHOICE FOR LONG-TERM PRESTIGE AND WEALTH PRESERVATION.

BENCHMARKING LESSON

Newport has established itself as a heritage-driven luxury destination, successfully leveraging its Gilded Age mansions, maritime culture, and boutique event strategy to attract high-net-worth visitors. One of the most valuable takeaways for Palm Beach County is Newport's ability to preserve and monetize its historic assets, turning its mansions and estates into premier event venues, immersive attractions, and high-end hospitality experiences. Palm Beach can draw from this model by expanding the experiential elements of its own historic sites, such as the Flagler Museum, through VIP mansion stays, private estate tours, and curated Gilded Age-themed luxury packages. By transforming historical landmarks into active, revenue-generating tourism experiences, Palm Beach can enhance its ability to appeal to affluent travelers who prioritize cultural authenticity and exclusivity.

Another key insight from Newport is its dominance in niche luxury tourism markets, particularly high-end sailing, boutique automotive events, and intimate cultural festivals. Newport's reputation as the "Sailing Capital of the World" is reinforced through its renowned regattas and luxury yacht events, attracting elite maritime tourists and fostering a strong connection between heritage and experiential tourism. Palm Beach, with its existing yachting infrastructure, could elevate its position by establishing an international regatta, expanding yacht-based hospitality offerings, and curating luxury sailing experiences that cater to high-net-worth individuals. Similarly, Newport's success in hosting exclusive automotive showcases, such as the Audrain Newport Concours & Motor Week, offers a model for Palm Beach to expand its luxury collector car scene through private automotive showcases, exclusive driving events, and VIP car auctions that integrate seamlessly with the county's luxury lifestyle brand.

Newport has also demonstrated how a seasonal destination can strategically extend its tourism calendar, using curated winter events and exclusive off-season experiences to attract affluent travelers beyond the summer peak. Through holiday-themed mansion tours, luxury winter retreats, and intimate seasonal festivals, Newport ensures that its appeal remains strong year-round. Palm Beach, while already benefiting from a year-round climate and active tourism economy, can take inspiration from this by curating off-season luxury travel experiences, such as boutique holiday markets, high-end wellness retreats, and exclusive fall/winter festival series. This strategy would further diversify Palm Beach's luxury tourism offerings and strengthen its competitive positioning in the high-end travel market.

While there are valuable lessons to draw from Newport, Palm Beach must also maintain its distinct identity rather than replicate Newport's approach directly. Palm Beach's appeal lies in its year-round vibrancy, international luxury presence, and dynamic social scene, making it inherently different from Newport's seasonal, heritage-driven exclusivity. By integrating experiential historical tourism, expanding niche luxury events, and curating exclusive maritime experiences, Palm Beach can enhance its competitive advantage while preserving its own brand as a modern, socially elite, and globally connected luxury destination.



SAN DIEGO + LA JOLLA

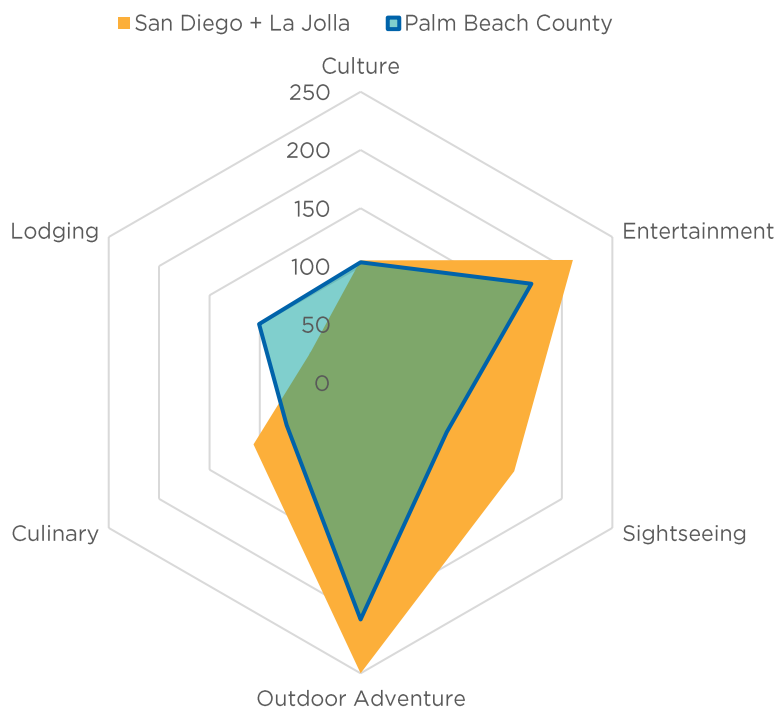
CALIFORNIA



SAN DIEGO + LA JOLLA CALIFORNIA

San Diego and La Jolla are known for their coastal landscapes, cultural attractions, and outdoor recreation opportunities. The region offers a diverse mix of experiences, drawing visitors interested in adventure, history, arts, and international influences. With a combination of scenic beaches, a growing culinary scene, and a well-established Conventions and Meetings sector, San Diego provides a balanced tourism experience that appeals to a wide range of travelers.

\$50,765,100 <i>(SAN DIEGO TOURISM AUTHORITY)</i>	10.50% <i>(TRANSIENT OCCUPANCY TAX)</i>	56.5 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



**COASTAL
ADVENTURE**



**CONVENTION &
MEETINGS**



**HISPANIC HERITAGE
FOCUSES**

SAN DIEGO + LA JOLLA CALIFORNIA

OVERALL TAKEAWAYS

- **Coastal and Outdoor Recreation** – San Diego/La Jolla offers year-round outdoor activities, including surfing, hiking, and marine exploration, creating a vibrant adventure tourism scene.
- **Cultural and Festivals** – San Diego's rich multicultural heritage, from its Mexican influences to its thriving arts districts, provides unique cultural experiences. Key events like the San Diego Latino Film Festival and Old Town Dia de los Muertos highlight these cultural offerings.
- **Luxury and Lifestyle** – While Palm Beach County dominates the ultra-luxury sector, San Diego provides a more diverse mix of luxury with a laid-back, experiential touch.
- **Sustainability and Transit** – San Diego's commitment to sustainability through green tourism initiatives (such as encouraging hotels to work with local farms and fishermen and reduce waste), electric transit options, and conservation programs strengthens its long-term visitor appeal.
- **High-Value Visitor Draws** – San Diego/La Jolla attracts affluent, experience-driven travelers drawn to iconic assets like La Jolla's luxury oceanfront resorts, Torrey Pines Golf Course, the San Diego Bay Wine & Food Festival, and other high-profile events.
- **Infrastructure and Accessibility** – Improvements in transportation, pedestrian-friendly districts, and event spaces increase accessibility and enhance visitor experience. San Diego's Free Ride Everywhere Downtown (FRED) program provides complimentary electric shuttle services. Additionally, the expansion of the San Diego International Airport has improved connectivity.
- **Future Growth** – Ongoing investments in the planned San Diego Convention Center's expansion, the development of new boutique luxury hotels, and enhanced sustainability efforts are shaping the region's long-term tourism strategy.
- **Competing with Palm Beach** – San Diego/La Jolla's experiential and diversified tourism appeal, including its strong MICE sector, cultural districts, and outdoor coastal recreation, contrasts with Palm Beach County's luxury, resort, and golf-driven identity.

PRIMARY ASSETS

San Diego/La Jolla is a well-regarded destination for outdoor and coastal recreation, featuring notable locations such as Torrey Pines State Reserve, La Jolla Cove, and the San Diego Zoo, which provide opportunities for hiking, wildlife encounters, and marine exploration. These assets appeal to visitors interested in active and nature-based experiences, an area where Palm Beach County has room to expand, particularly in eco-tourism and outdoor adventure offerings.

The city is also a strong hub for business and event tourism, with the San Diego Convention Center serving as a key venue for large-scale gatherings, including Comic-Con International, biotechnology summits, and medical conferences. This infrastructure supports a thriving Conventions and Meetings sector.

San Diego's diverse cultural landscape is another distinguishing feature, with neighborhoods such as Barrio Logan, Gaslamp Quarter, and Little Italy offering a blend of historical sites, contemporary arts, and international cuisine. This mix attracts visitors seeking authentic cultural experiences and culinary tourism.

While San Diego is well-known for adventure and outdoor recreation, Palm Beach County has a strong position in luxury tourism, golf, and equestrian sports. Wellington's Winter Equestrian Festival, high-end beachfront resorts, and championship golf courses draw an elite clientele, a segment that San Diego does not prioritize as heavily. Palm Beach County can leverage this distinction while considering opportunities to expand into experience-driven adventure tourism to capture a broader visitor base.

RESPONDING TO TRENDS

Wellness and Medical Tourism: San Diego is expanding its wellness and medical tourism sector through high-end retreats and state-of-the-art medical facilities. Rancho Valencia Resort & Spa offers holistic wellness experiences, including customized fitness programs, meditation retreats, and organic culinary offerings. Meanwhile, UC San Diego Health continues to grow its reputation as a premier destination for medical tourism, with cutting-edge research in regenerative medicine and specialized treatments for international patients. Additionally, luxury hotels such as the Fairmont Grand Del Mar have improved and expanded upon spa experiences that cater specifically to health-conscious travelers seeking rejuvenation and relaxation.

Immersive and Transformative Experiences: San Diego has prioritized the development of immersive attractions to enhance visitor engagement. The USS Midway Museum has introduced interactive flight simulators and augmented reality (AR) experiences, allowing visitors to explore historical naval operations in new ways. The San Diego Zoo continues to expand its behind-the-scenes tours, offering guests exclusive access to animal care programs and conservation efforts. Additionally, Balboa Park's cultural institutions, such as the Fleet Science Center, provide hands-on exhibits that immerse visitors in educational and scientific exploration.

Authenticity and Cultural Enrichment: San Diego is actively promoting its cultural heritage through expanded events and district enhancements. Barrio Logan, a historically significant Mexican American neighborhood, has seen increased investment in local arts programming, including large-scale public murals, cultural festivals, and artist cooperatives. Old Town San Diego continues to evolve as a living history museum, incorporating interactive historical reenactments and culinary experiences that highlight authentic Mexican and early Californian traditions. The city has also introduced initiatives such as the San Diego Trolley's Heritage Route, which connects key cultural districts and enhances accessibility to historic sites.

Sustainability and Green Tourism: San Diego has positioned itself as a leader in sustainable tourism with initiatives that promote environmental responsibility. The city has expanded its electric shuttle services, such as the Free Ride Everywhere Downtown (FRED) program, to reduce reliance on cars and encourage eco-friendly transit. Hotels like The Hotel del Coronado and L'Auberge Del Mar have implemented solar energy solutions, water conservation programs, and waste reduction initiatives. Additionally, the city has strengthened its marine conservation efforts, with organizations like Scripps Institution of Oceanography leading sustainability-focused visitor programs that educate travelers about ocean health and climate change.

Outdoor Adventure and Youth Sports: San Diego continues to build on its reputation as an outdoor recreation hub. Torrey Pines State Reserve has enhanced its trail systems and visitor education programs to provide an improved hiking experience with a conservation focus. The city's various sports complexes also host major youth sports tournaments, including national soccer, baseball, and surfing championships, drawing thousands of young athletes and their families each year. Expanding programs such as the Junior Lifeguard Program and surfing schools along Mission Beach and La Jolla Shores further reinforce San Diego's appeal to families and adventure-seeking travelers.

Luxury and Culinary Experiences: San Diego's food and beverage industry continues to elevate its status as a premier culinary destination. The San Diego Bay Wine & Food Festival, one of the largest of its kind, attracts international chefs, sommeliers, and gourmet food lovers. In La Jolla, high-end dining establishments such as George's at the Cove and Eddie V's Prime Seafood provide fine dining experiences with stunning oceanfront views. The city is also leveraging its craft beer scene, with breweries like Stone Brewing and Modern Times offering curated tasting experiences that highlight San Diego's leadership in the craft beverage industry.

FUTURE TOURISM STRATEGIES

San Diego is advancing sustainable tourism through initiatives like the Port of San Diego's Blue Economy Incubator, which supports low-impact boating and marine conservation experiences, and the Free Ride Everywhere Downtown (FRED) program, expanding electric shuttle services to reduce emissions in tourist areas. Hotels such as Hotel del Coronado and L'Auberge Del Mar are integrating water conservation, renewable energy, and zero-waste programs.

Outdoor and adventure tourism is growing with expanded hiking trails at Torrey Pines and Mission Trails Regional Park, new water-based recreation experiences in La Jolla's marine reserve and Mission Beach surf schools, and conservation-focused tourism programs through Scripps Institution of Oceanography.

The expansion of the San Diego Convention Center will greatly enhance the destination's ability to attract biotechnology, healthcare, and digital media conferences. Comic-Con's success serves as a model for drawing more large-scale entertainment and industry events, while luxury hotels like Pendry San Diego and InterContinental are adding high-end business meeting spaces.

Cultural tourism is growing with Barrio Logan's expanded arts programming and festival development, Gaslamp Quarter infrastructure improvements, and heritage site restorations in Old Town. La Jolla Playhouse continues to elevate San Diego's theater scene, premiering Broadway-bound productions.

Culinary tourism is evolving with an expanded San Diego Bay Wine & Food Festival, new high-end dining investments in Little Italy and La Jolla, and guided craft beer tourism experiences featuring major brands like Ballast Point and Modern Times.

HIGH VALUE VISITOR PREFERENCES: SAN DIEGO + LA JOLLA VS. PALM BEACH COUNTY

Palm Beach County outperformed San Diego + La Jolla as the preferred place to live for most Mosaic segments, particularly those seeking financial advantages, high-end exclusivity, and a more refined luxury lifestyle. Segments such as "American Royalty," "Platinum Prosperity," and "Golf Carts and Gourmets" overwhelmingly favored PBC for its estate communities, wealth-friendly policies, and elite social scene. While San Diego + La Jolla were preferred by "Cosmopolitan Achievers" and "Sophisticated City Dwellers" for their vibrant cultural scene, oceanfront urban energy, and strong business environment, PBC offered a more prestigious and tax-efficient alternative for long-term affluent living.

For visitation, San Diego + La Jolla performed well among "Jet Set Urbanites," "Across the Ages," and "Kids and Cabernet," who were drawn to its coastal city appeal, diverse experiences, and outdoor recreation. However, PBC remained the top choice for luxury travelers, with segments such as "Philanthropic Sophisticates" and "Couples with Clout" favoring its exclusive leisure experiences, high-end resorts, and premier golf courses. While San Diego + La Jolla offer a dynamic blend of culture, coastline, and urban vibrancy, PBC provides a more refined and exclusive luxury experience, making it the preferred destination for high-net-worth individuals and families seeking an elite, year-round lifestyle.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC for its refined luxury, wealth-friendly policies, and exclusivity.
	Platinum Prosperity	PBC	PBC	PBC wins for both visiting and living due to its stable high-end lifestyle, tax advantages, and affluent social scene.
	Kids and Cabernet	San Diego + La Jolla	PBC	San Diego + La Jolla are attractive destinations for family-friendly coastal experiences, but PBC is preferred for its upscale suburban appeal and top-tier education.
	Picture Perfect Families	San Diego + La Jolla	PBC	Visits San Diego + La Jolla for its balance of luxury and family attractions but prefers PBC for long-term living due to its strong community ties.
	Couples with Clout	PBC	PBC	PBC is the clear choice for both visiting and living, offering luxury, leisure, and networking opportunities.
	Jet Set Urbanites	San Diego + La Jolla	San Diego + La Jolla	San Diego + La Jolla appeal for both visiting and living due to their dynamic, multicultural, and high-energy urban environment.
FLOURISHING FAMILIES	Across the Ages	San Diego + La Jolla	PBC	San Diego + La Jolla offer a vibrant coastal experience for travel, but PBC is preferred for long-term stability and a strong multi-generational community.
	Babies and Bliss	PBC	PBC	PBC is the best choice for young families, providing safety, high-quality schools, and a luxurious suburban lifestyle.
	Family Fun-Tastic	PBC	PBC	PBC is the top destination for both visiting and living, offering family-friendly entertainment, parks, and year-round activities.
	Cosmopolitan Achievers	San Diego + La Jolla	San Diego + La Jolla	San Diego + La Jolla attract this group for their diverse professional and cultural experiences, making them a preferred place to live.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	San Diego + La Jolla	PBC is an appealing place to visit, but San Diego + La Jolla win for long-term living with their mix of luxury and urban energy.
	Golf Carts and Gourmets	PBC	PBC	PBC is the clear winner for both visiting and living, with top-tier golf courses, fine dining, and an active leisure community.
	Philanthropic Sophisticates	PBC	PBC	PBC provides the best environment for year-round philanthropic engagement and high-impact giving.
	Boomers and Boomerangs	PBC	PBC	PBC remains the top choice for both visiting and living due to its warm climate, multi-generational communities, and strong social ties.
	PALM BEACH WINS (OUT OF 14)	9	11	SAN DIEGO + LA JOLLA ARE DYNAMIC, MULTICULTURAL COASTAL EXPERIENCES, BUT PBC IS PREFERRED FOR ITS YEAR-ROUND EXCLUSIVITY AND TAX ADVANTAGES.

BENCHMARKING LESSONS

San Diego/La Jolla's strengths in outdoor adventure and coastal recreation attract experience-driven travelers through assets like Torrey Pines hiking trails, La Jolla Cove water activities, and adventure tourism programs. Palm Beach County could expand its eco-tourism, water-based activities, and outdoor recreation to appeal to visitors beyond traditional luxury and golf tourism. San Diego's leadership in the conventions and meetings industry, anchored by the San Diego Convention Center and events like Comic-Con, highlights the value of integrating large-scale conferences with leisure offerings. Palm Beach County could attract more business travelers by expanding industry-specific conferences and creating incentive travel packages that encourage extended stays.

San Diego also excels in cultural tourism and neighborhood revitalization, with Barrio Logan's arts district, Old Town's heritage experiences, and La Jolla Playhouse's theater scene drawing visitors. Palm Beach County could enhance its cultural appeal by investing in Latin American and Caribbean festivals, interactive heritage sites, and dedicated arts districts. San Diego's culinary growth, with food and wine festivals, craft brewery experiences, and high-end waterfront dining, has strengthened its tourism appeal. Palm Beach County can build on its fine dining reputation by expanding food and wine events, developing chef-driven experiences, and enhancing its waterfront dining options.

Finally, San Diego's sustainability initiatives, including electric shuttles, green hotels, and marine conservation programs, provide a model for Palm Beach County to invest in eco-friendly transportation, sustainable lodging, and conservation-driven tourism. While San Diego attracts adventure seekers, business travelers, and cultural tourists, Palm Beach County can differentiate itself by maintaining its exclusive, high-end appeal while integrating more experiential and eco-conscious offerings.



SANTA BARBARA

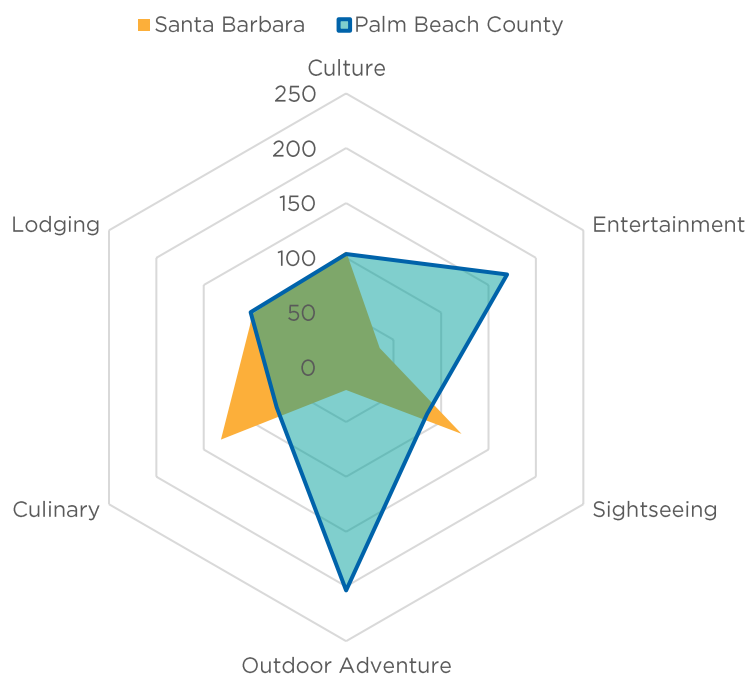
CALIFORNIA



SANTA BARBARA CALIFORNIA

Santa Barbara, California, is a coastal tourism destination that combines natural landscapes, cultural heritage, and a range of accommodations. The city attracts a mix of visitors, including leisure travelers, families, and those interested in wine tourism. Its tourism market is supported by a temperate climate, a developed hospitality sector, and a variety of outdoor and cultural activities.

\$9,914,700 <i>(VISIT SANTA BARBARA CVB)</i>	12.00% <i>(TRANSIENT OCCUPANCY TAX)</i>	9.5 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



SANTA BARBARA
FILM FESTIVAL

ART DISTRICT

HISTORIC FOCUSES

SANTA BARBARA CALIFORNIA

OVERALL TAKEAWAYS

- **Luxury and Outdoor Recreation** – Santa Barbara offers high-end resorts, boutique hotels, and golf courses catering to luxury travelers. The region's outdoor attractions include extensive hiking and biking trails, water activities such as kayaking and sailing, and a strong wine tourism industry centered around the Santa Ynez Valley.
- **Cultural and Festivals** – The city features a strong arts and heritage scene, with institutions like the Santa Barbara Museum of Art, historic Mission Santa Barbara, and the Lobero Theatre. Major events such as the Santa Barbara International Film Festival and Old Spanish Days Fiesta contribute to year-round cultural tourism.
- **Wellness and Experiences** – Santa Barbara's tourism sector includes a growing focus on wellness, with high-end spa resorts, beachfront yoga, and farm-to-table culinary experiences. The city appeals to travelers looking for relaxation and health-focused tourism.
- **Sustainability and Transit** – The city promotes eco-friendly tourism with initiatives such as the electric downtown waterfront shuttle, coastal conservation efforts, and LEED-certified hotels.
- **High-Value Visitor Draws** – Santa Barbara attracts affluent visitors through luxury resorts like Rosewood Miramar Beach and the Ritz-Carlton Bacara, exclusive wine experiences in the Santa Ynez Valley, and private yacht charters from the Santa Barbara Harbor. High-end golf courses, Michelin-starred dining, and wellness retreats further position the city as a premium destination for luxury travelers.
- **Infrastructure and Safety** – The city continues to enhance visitor infrastructure, including upgraded airport facilities, improved public transportation, and increased pedestrian-friendly spaces. Public safety measures and a focus on maintaining a clean, welcoming environment contribute to positive visitor experiences.
- **Future Growth** – Efforts to expand tourism include strengthening digital marketing campaigns, diversifying festival offerings, and developing cultural attractions to engage new markets. Santa Barbara is also positioning itself as a destination for remote work and extended stays.
- **Competing with Palm Beach** – While both destinations cater to luxury travelers, Santa Barbara differentiates itself with a focus on outdoor recreation, wellness, and wine tourism. In contrast, Palm Beach emphasizes high-end shopping, golf, and beachfront resorts, offering a more traditional luxury experience.

PRIMARY ASSETS

Santa Barbara's tourism identity is defined by a mix of luxury, cultural heritage, and outdoor recreation. The region's high-end resorts, such as San Ysidro Ranch and El Encanto, attract affluent visitors seeking privacy, spa experiences, and oceanfront relaxation. Luxury tourism is further bolstered by the Santa Ynez Valley wine region, which draws visitors for exclusive vineyard tours, private tastings, and a thriving culinary scene that highlights the area's world-class wines. This combination of premium accommodations and wine tourism positions Santa Barbara as a leading destination for high-value travelers.

Cultural and historical attractions further enhance Santa Barbara's appeal. Spanish colonial landmarks like Mission Santa Barbara and the Presidio reflect the city's deep-rooted heritage, while the Santa Barbara Museum of Art and the historic Lobero Theatre add to its cultural landscape. The Funk Zone, a vibrant district blending contemporary art galleries, wine-tasting rooms, and local craft breweries, provides a modern counterpoint to the city's historical charm. These assets attract visitors seeking a destination with both a rich past and a dynamic, creative atmosphere.

Outdoor recreation plays a significant role in Santa Barbara's tourism market. The Santa Ynez Mountains offer hiking, mountain biking, and panoramic coastal views, catering to adventure seekers. The city's beaches, including East Beach and Butterfly Beach, serve as key draws for water activities such as kayaking, paddleboarding, and surfing. Santa Barbara's commitment to sustainability is evident in its eco-tourism initiatives, including the electric Santa Barbara Downtown Waterfront Shuttle and conservation efforts aimed at protecting its natural landscapes. These initiatives align with the growing demand for environmentally responsible travel experiences.

Santa Barbara's events and festivals contribute to its year-round visitor appeal. The Santa Barbara International Film Festival attracts global attention, bringing filmmakers and cinephiles to the city each year. Events such as the Old Spanish Days Fiesta and the Santa Barbara Wine Festival celebrate the region's cultural and culinary identity, driving tourism during peak seasons. Additionally, smaller arts and music festivals provide ongoing engagement for both locals and visitors, reinforcing Santa Barbara's reputation as a vibrant cultural destination.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Santa Barbara has expanded its wellness offerings with new high-end spa retreats, including enhancements at luxury resorts like San Ysidro Ranch and the Ritz-Carlton Bacara. The city has also seen a rise in holistic health services, with wellness centers incorporating nature-based therapies, meditation programs, and outdoor yoga experiences. Additionally, Santa Barbara's medical tourism sector is growing, with leading healthcare facilities such as Cottage Health drawing patients seeking top-tier treatments in a restorative coastal setting.

Immersive and Transformative Experiences: The Santa Barbara International Film Festival continues to evolve with expanded programming, interactive screenings, and exclusive industry panels that engage both locals and visitors. Additionally, new public art installations and interactive exhibits in the Funk Zone and downtown Santa Barbara enhance visitor engagement, blending culture and community participation in a meaningful way.

Authenticity and Cultural Enrichment: Investments in heritage tourism have strengthened Santa Barbara's cultural appeal. Restoration projects at Mission Santa Barbara and the El Presidio de Santa Bárbara State Historic Park preserve the city's Spanish colonial legacy, while the Santa Barbara Museum of Art recently completed a \$50 million renovation to enhance its exhibition space and visitor experience. The city has also supported cultural programming, such as traditional Spanish music and dance performances, to further celebrate its historical roots.

Sustainability: Santa Barbara is reinforcing its commitment to sustainable tourism with expanded eco-friendly transportation, including increased accessibility to the electric Santa Barbara Downtown Waterfront Shuttle and bike-share programs. Local wineries in the Santa Ynez Valley are prioritizing organic and biodynamic farming, while the city has implemented stronger conservation measures to protect the Channel Islands National Park and marine wildlife. Sustainability certification programs are also being introduced to encourage hotels and businesses to adopt environmentally responsible practices.

Entertainment and 'Eatertainment': The Funk Zone has seen continued growth as a culinary and entertainment district, with new chef-driven restaurants, live music venues, and food-and-wine pairing experiences designed to create a dynamic dining scene. The Santa Barbara Public Market has expanded its offerings, integrating more interactive culinary events, including chef-led tastings and farm-to-table workshops.

Outdoor Adventure and Sports: Santa Barbara is enhancing its reputation as an outdoor recreation hub through infrastructure improvements, such as new hiking trail expansions in Los Padres National Forest and upgraded coastal access points for surfing and kayaking. The city has also invested in adventure tourism, with guided whale-watching experiences and eco-conscious adventure outfitters offering sustainable excursions.

Content Creation: The Santa Barbara tourism board has increased partnerships with influencers and content creators to highlight key attractions, from the Santa Ynez Valley to Butterfly Beach. The city's digital marketing efforts have expanded, utilizing high-quality visual storytelling and social media campaigns to showcase Santa Barbara as a premier travel destination.

Inclusivity: Santa Barbara has focused on accessibility improvements across its attractions, making more historic sites ADA-compliant and introducing sensory-friendly experiences at venues like the Santa Barbara Zoo. The city has also increased its multicultural programming, including festivals and events that celebrate its diverse community, ensuring broader representation in tourism marketing.

Multi-Generational Appeal: Family-friendly attractions continue to expand, with updates at the Santa Barbara Zoo and new interactive exhibits at MOXI, The Wolf Museum of Exploration + Innovation. Luxury resorts have also adapted to multi-generational travel trends by offering family suites, kid-friendly programming, and wellness experiences tailored to different age groups.

FUTURE TOURISM STRATEGIES

Santa Barbara is actively implementing targeted strategies to enhance its tourism sector, focusing on sustainability, wellness, cultural enrichment, and digital engagement. The city is promoting eco-friendly accommodations and transportation options, with initiatives like Sustainable Wine Tours offering bespoke green wine tours that highlight the region's commitment to sustainable practices. This focus on sustainability aligns with the growing demand for environmentally responsible travel experiences.

Recognizing the increasing interest in wellness tourism, Visit Santa Barbara has launched marketing campaigns positioning the city as a premier wellness destination. Collaborations with local businesses have led to the expansion of health-focused experiences, including yoga retreats, spa packages, and nature-based wellness activities. These initiatives aim to attract travelers seeking relaxation and rejuvenation in a coastal setting.

Cultural tourism is another area of investment, with Santa Barbara actively enhancing its cultural assets to draw a diverse range of visitors. The Santa Barbara Museum of Art recently completed a significant renovation, improving its exhibition spaces and broadening its appeal to art enthusiasts. These developments support the city's efforts to elevate its cultural tourism offerings and reinforce its reputation as an arts and heritage destination.

Digital engagement and marketing also play a crucial role in Santa Barbara's tourism strategy. Visit Santa Barbara has invested in high-quality content production, including a five-day video shoot in 2022 to create marketing materials that showcase the city's attractions to potential visitors. These efforts aim to strengthen Santa Barbara's digital presence and appeal to a broader audience through targeted campaigns.

HIGH VALUE VISITOR PREFERENCES: SANTA BARBARA VS. PALM BEACH COUNTY

Palm Beach County outperformed Santa Barbara as the preferred place to live among most Mosaic segments, particularly those seeking financial advantages, year-round luxury, and access to an elite social scene. Segments such as "American Royalty," "Platinum Prosperity," and "Philanthropic Sophisticates" favored PBC for its exclusive estates, wealth-friendly tax policies, and premier leisure amenities. While Santa Barbara was the preferred home for "Cosmopolitan Achievers" and "Sophisticated City Dwellers," who value its coastal charm, cultural vibrancy, and slower-paced luxury, PBC offered a more prestigious and financially advantageous setting for long-term affluent living.

For visitation, Santa Barbara performed well among "American Royalty," "Couples with Clout," and "Across the Ages," who were drawn to its picturesque coastline, wineries, and historic appeal. However, PBC remained the preferred travel destination for high-net-worth individuals, with segments like "Golf Carts and Gourmets" and "Philanthropic Sophisticates" choosing PBC for its luxury resorts, high-end golf courses, and sophisticated cultural scene. While Santa Barbara is a desirable retreat for those seeking scenic elegance and a relaxed atmosphere, PBC offers a broader, year-round luxury experience, making it the more attractive destination for elite travelers and long-term residents.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Santa Barbara	PBC	Visits Santa Barbara for its refined coastal elegance but prefers PBC for its estate lifestyle, tax advantages, and elite networking.
	Platinum Prosperity	PBC	PBC	PBC is the preferred destination for both visiting and living due to its high-net-worth advantages, premier luxury, and stable economic environment.
	Kids and Cabernet	PBC	PBC	PBC is the clear choice for both visiting and living, offering top schools, upscale suburban settings, and abundant family-friendly activities.
	Picture Perfect Families	PBC	PBC	PBC wins as the preferred place for both visiting and living, providing the ideal mix of affluence, safety, and a strong family-oriented community.
	Couples with Clout	Santa Barbara	PBC	Santa Barbara is an attractive getaway with a picturesque setting, but PBC offers a more balanced and prestigious long-term lifestyle.
	Jet Set Urbanites	Santa Barbara	PBC	Santa Barbara is an appealing travel destination for high-end coastal experiences, but PBC offers a more exclusive urban lifestyle with strong financial benefits.
FLOURISHING FAMILIES	Across the Ages	Santa Barbara	PBC	Santa Barbara offers an intimate, scenic experience for visits, but PBC is the preferred long-term destination for its multi-generational appeal and dynamic amenities.
	Babies and Bliss	PBC	PBC	PBC is the best environment for raising young families, providing excellent schools, safe communities, and access to a range of family-friendly activities.
	Family Fun-Tastic	PBC	PBC	PBC wins as the preferred destination for both visiting and living, offering a balanced suburban atmosphere with ample family recreational opportunities.
	Cosmopolitan Achievers	Santa Barbara	Santa Barbara	Santa Barbara offers a sophisticated coastal environment for travel and long-term living, making it the preferred home for this segment.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Santa Barbara	Santa Barbara	Santa Barbara is the preferred place for both visiting and living due to its relaxed, yet high-end coastal urban lifestyle.
	Golf Carts and Gourmets	PBC	PBC	PBC dominates as the preferred destination for both visiting and living, providing world-class golf courses, fine dining, and a luxurious leisure lifestyle.
	Philanthropic Sophisticates	PBC	PBC	PBC remains the best environment for year-round philanthropic engagement and deep community involvement.
	Boomers and Boomerangs	PBC	PBC	PBC is the preferred place for both visiting and living, offering strong retirement appeal, upscale communities, and a thriving social scene.
	PALM BEACH WINS (OUT OF 14)	8	12	SANTA BARBARA IS A PICTURESQUE COASTAL CITY IDEAL FOR TRAVEL, BUT PBC PROVIDES A MORE STABLE AND FINANCIALLY ADVANTAGEOUS LUXURY ENVIRONMENT.

BENCHMARKING LESSONS

Santa Barbara's success in sustainable tourism provides a key opportunity for Palm Beach County to refine its approach to eco-conscious travel. Santa Barbara has effectively integrated sustainability into its tourism model through initiatives like eco-friendly accommodations, green wine tourism, and low-impact transportation such as the electric Santa Barbara Trolley. Palm Beach County, with its vast natural resources including the Everglades, Intracoastal Waterway, and Atlantic coastline, could benefit from expanding its environmental initiatives. Strengthening water conservation efforts, promoting carbon-neutral accommodations, and investing in sustainable transit solutions—such as electric shuttles or improved biking infrastructure—could elevate Palm Beach County's appeal to eco-conscious travelers. By positioning itself as a leader in responsible tourism, Palm Beach County can attract a new demographic of visitors who prioritize destinations with strong sustainability commitments.

Additionally, Santa Barbara's approach to wellness and family-friendly tourism offers valuable insights for Palm Beach County's strategy. Santa Barbara has successfully marketed itself as a wellness destination by integrating high-end spa resorts, outdoor fitness programs, and holistic health retreats into its tourism offerings. Palm Beach County, already home to luxury resorts and high-end spas, could further develop its wellness sector by introducing immersive wellness experiences, curated retreat packages, and nature-based wellness programs, leveraging its beaches, parks, and golf resorts. Furthermore, Santa Barbara's strength in multi-generational tourism—highlighted by attractions like the Santa Barbara Zoo and interactive outdoor adventures—demonstrates the value of diversifying family-friendly experiences. By expanding interactive museums, creating more nature-based excursions, and enhancing family-oriented luxury resorts, Palm Beach County can better position itself as a premier destination for families seeking both relaxation and adventure.



SCOTTSDALE

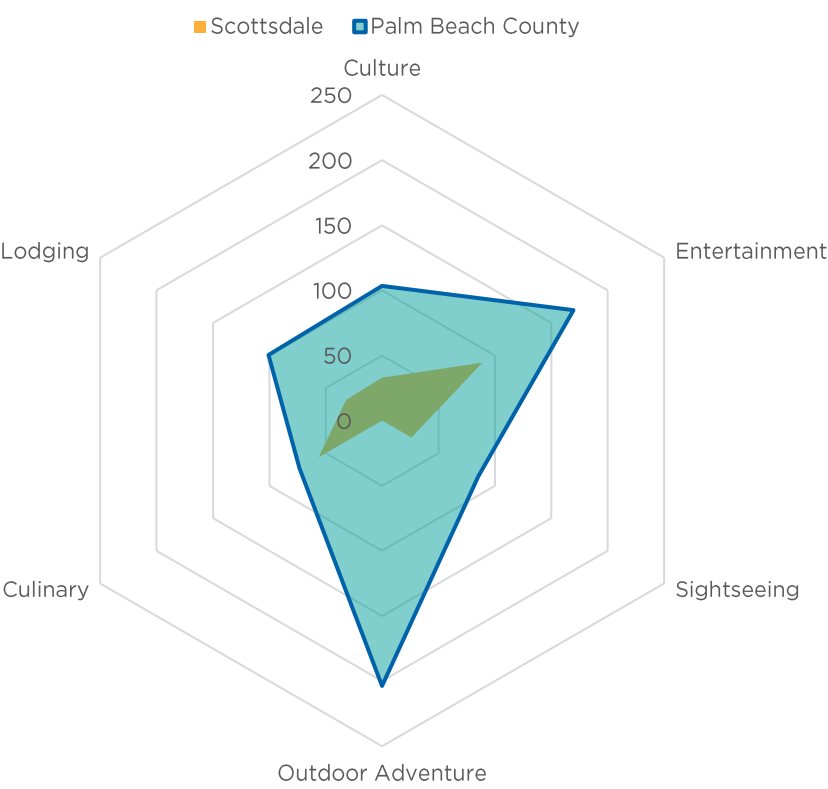
ARIZONA



SCOTTSDALE ARIZONA

Scottsdale, Arizona, stands out as a vibrant tourism destination, renowned for its lush golf courses, luxurious spas, and unique desert landscapes that offer a variety of recreational activities.

<div>\$14,500,000</div> <div>(EXPERIENCE SCOTTSDALE CVB)</div>	<div>14.02%</div> <div>(TRANSIENT OCCUPANCY TAX)</div>	<div>9.3 MILLION</div>
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



WELLNESS



OUTDOOR
ADVENTURE



SUSTAINABILITY
FOCUSES

SCOTTSDALE ARIZONA

OVERALL TAKEAWAYS

- **Luxury and Outdoor Recreation** – Scottsdale offers top-tier golf, wellness resorts, and equestrian events, with unique desert adventures.
- **Cultural and Festivals** – A rich blend of Western and Native American heritage, plus major events like Canal Convergence and Western Week.
- **Wellness and Experiences** – Resorts like Sanctuary Camelback and CIVANA focus on wellness, while immersive art events enhance visitor engagement.
- **Sustainability and Transit** – Eco-friendly trolleys and golf carts improve access while reducing environmental impact.
- **High-Value Visitors** – Attracts affluent travelers seeking luxury, adventure, and exclusivity in a relaxed setting.
- **Infrastructure and Safety** – Upgrades to transportation, visitor facilities, and security improve accessibility and safety.
- **Future Growth** – Expanding digital marketing, arts, and cultural programs to attract a broader visitor base.
- **Competing with Palm Beach** – Scottsdale’s outdoor adventure and wellness focus contrast with Palm Beach’s luxury beachfront appeal.

PRIMARY ASSETS

Scottsdale is renowned for its high-quality golf courses, such as TPC Scottsdale, which hosts PGA Tour events and attracts golf enthusiasts from around the globe. The city also draws a significant national audience with its equestrian events at WestWorld, including the Scottsdale Arabian Horse Show—the largest of its kind in the world. These events rival the renowned golf courses and prestigious Winter Equestrian Festival held in Wellington, Palm Beach County.

The city utilizes its upscale resorts to host conferences, providing a boutique experience that might appeal to exclusive groups. This approach contrasts with the larger convention facilities in Palm Beach County, suggesting that developing dedicated convention spaces could help Scottsdale attract larger events and enhance its competitive edge.

The cultural blend of Western and Native American heritage in Scottsdale is showcased at attractions like the Museum of the West and through ongoing cultural events that celebrate Native American culture. This distinct focus offers a niche that differentiates the city from Palm Beach County’s more traditional and maritime-focused historical attractions.

The Sonoran Desert around Scottsdale provides exceptional opportunities for outdoor adventure, appealing to those interested in activities such as hiking, biking, and wildlife photography. This contrasts with Palm Beach County's focus on beach and marine activities, positioning Scottsdale as a unique destination for eco-tourism and adventure tourism.

Scottsdale boasts a vibrant festival scene with events such as the Scottsdale Arts Festival and Canal Convergence, where large-scale, interactive public art installations incorporate elements like light and water. Additional regular events like the Scottsdale ArtWalk and Western Week cultivate a lively cultural atmosphere, drawing both locals and tourists. This festival scene is akin to, yet distinct from, Palm Beach County's larger music and cultural festivals, enhancing Scottsdale's appeal as a culturally rich destination.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Resorts like the Sanctuary Camelback and CIVANA offer holistic health retreats, while the Mayo Clinic attracts medical tourists with specialized wellness programs.

Immersive Experiences: Events like Canal Convergence combine art, technology, and community interaction, enriching visitor engagement.

Authenticity and Cultural Enrichment: The Western Spirit: Scottsdale's Museum of the West offers insights into the region's history, enhancing cultural offerings.

Sustainability: Scottsdale promotes eco-friendly practices with its electric trolley system and golf cars, reducing the carbon footprint and enhancing transport convenience.

Entertainment and 'Eatertainment': Venues such as The Culinary Dropout merge dining and entertainment, catering to modern visitor preferences.

Outdoor Adventure and Sports: The city hosts events like the Scottsdale Arabian Horse Show and offers unique desert activities, supporting both community spirit and tourism.

Content Creation: Scottsdale leverages its scenic landscapes through social media and influencer partnerships, increasing its visibility and appeal.

Inclusivity: Ensuring accessibility for all, Scottsdale's public spaces are ADA compliant, and the city engages in targeted marketing to diverse groups.

Multi-Generational Appeal: Attractions like McCormick-Stillman Railroad Park and family-friendly resorts cater to all ages, making Scottsdale ideal for family travel.

FUTURE TOURISM STRATEGIES

Scottsdale's future tourism strategy places a strong emphasis on sustainability, aiming to integrate eco-friendly practices across all events and tourism activities. This includes promoting environmental stewardship, incorporating sustainable event management, and encouraging businesses to adopt green initiatives. The city is also focused on improving visitor experiences by upgrading attractions, introducing immersive and interactive elements, and enhancing overall infrastructure to make Scottsdale more accessible and enjoyable for tourists.

A key component of the plan is deepening engagement with local communities and stakeholders to ensure that tourism growth aligns with residents' well-being. This involves establishing feedback mechanisms, fostering partnerships with local businesses, and maintaining a balanced approach that supports both economic growth and quality of life. Strengthening marketing and branding efforts is another priority, with Scottsdale aiming to reach new audiences through digital marketing strategies, compelling storytelling, and targeted outreach to untapped market segments such as convention groups, outdoor adventurers, and young affluent couples.

Cultural and artistic expansion is also central to the plan, with initiatives to support local artists, expand cultural festivals, and enhance arts education. To accommodate increasing visitor numbers, infrastructure improvements such as better transportation links, upgraded signage, and improved connectivity between attractions are planned. Additionally, training programs for tourism professionals will ensure Scottsdale remains at the forefront of industry trends, providing high-quality service and hospitality.

Finally, visitor safety and security remain critical components of the strategy. Enhancements such as increased security personnel at key tourist areas and the adoption of advanced security technologies aim to make Scottsdale a safe and welcoming destination.

HIGH VALUE VISITOR PREFERENCES: SCOTTSDALE VS. PALM BEACH COUNTY

Palm Beach County outperformed Scottsdale as the preferred place to live among most Mosaic segments, particularly those seeking a coastal luxury lifestyle, financial benefits, and a well-established high-net-worth community. Segments such as "American Royalty," "Platinum Prosperity," and "Golf Carts and Gourmets" overwhelmingly favored PBC for its oceanfront estates, tax advantages, and premier social scene. While Scottsdale was preferred by "Boomers and Boomerangs" and "Cosmopolitan Achievers" for its thriving desert luxury, growing business environment, and active retirement appeal, PBC offered a more prestigious, waterfront-oriented, and internationally connected alternative for affluent residents.

For visitation, Scottsdale attracted interest from "Kids and Cabernet," "Picture Perfect Families," and "Across the Ages," who were drawn to its outdoor lifestyle, luxury resorts, and golf culture. However, PBC remained the dominant choice for high-end travelers, with segments such as "Philanthropic Sophisticates" and "Sophisticated City Dwellers" choosing it for its world-class golf courses, yachting lifestyle, and elite social events. While Scottsdale excels as a premier desert retreat with strong appeal to luxury retirees and active travelers, PBC provides a more exclusive, year-round waterfront lifestyle, making it the stronger choice for long-term affluent living and high-end tourism.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	PBC is the clear choice for both visiting and living due to its estate lifestyle, elite social scene, and tax advantages.
	Platinum Prosperity	PBC	PBC	PBC wins as both the preferred travel and living destination, offering high-net-worth advantages, luxury, and a thriving business climate.
	Kids and Cabernet	Scottsdale	PBC	Scottsdale is an attractive travel destination for families seeking a unique desert experience, but PBC is preferred for its top-tier schools and family-friendly suburban luxury.
	Picture Perfect Families	Scottsdale	PBC	Scottsdale offers an exciting getaway for families, but PBC provides a better balance of community, education, and upscale suburban amenities.
	Couples with Clout	Scottsdale	PBC	Scottsdale is appealing for its high-end resorts and golf retreats, but PBC offers a more established, refined luxury lifestyle for long-term living.
	Jet Set Urbanites	PBC	PBC	PBC is the preferred destination for both visiting and living, offering an upscale urban experience with coastal exclusivity and international connectivity.
FLOURISHING FAMILIES	Across the Ages	Scottsdale	PBC	Scottsdale is an attractive place to visit for its outdoor lifestyle and entertainment, but PBC wins for its multi-generational appeal and vibrant community.
	Babies and Bliss	PBC	PBC	PBC remains the top choice for both visiting and living, offering the ideal environment for young families with high-end schools and safe neighborhoods.
	Family Fun-Tastic	PBC	PBC	PBC wins as the preferred destination for both visiting and living, offering a well-rounded suburban lifestyle with access to parks and activities.
	Cosmopolitan Achievers	PBC	Scottsdale	PBC is the preferred travel destination, but Scottsdale offers a strong cultural and professional environment, making it the preferred place to live for this group.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	Scottsdale	PBC is an attractive place to visit, but Scottsdale is preferred for long-term living due to its growing urban energy and luxury lifestyle.
	Golf Carts and Gourmets	PBC	PBC	PBC dominates as the preferred destination for both visiting and living, providing world-class golf courses, fine dining, and an established leisure community.
	Philanthropic Sophisticates	PBC	PBC	PBC remains the best environment for year-round philanthropic engagement and deep community involvement.
	Boomers and Boomerangs	Scottsdale	Scottsdale	Scottsdale is the preferred choice for both visiting and living, offering a dry, warm climate and a strong retirement community.
	PALM BEACH WINS (OUT OF 14)	9	11	SCOTTSDALE IS A LUXURY DESERT ESCAPE WITH STRONG RETIREMENT APPEAL, YET PBC OFFERS A MORE EXCLUSIVE, YEAR-ROUND WATERFRONT LIFESTYLE.

BENCHMARKING LESSONS

To compete more effectively with Scottsdale, Palm Beach County could expand its family-friendly offerings by developing interactive attractions, kid-friendly resorts, and recreational parks. Enhancing wellness tourism through spa retreats, wellness festivals, and health-focused experiences could attract visitors seeking relaxation and rejuvenation. Additionally, improving cultural and artistic attractions, such as supporting local artists, hosting major festivals, and promoting gourmet food events, would appeal to demographics that value a sophisticated cultural experience.

Palm Beach County could also strengthen its position in golf and leisure sports by upgrading courses, adding new luxury amenities, and hosting high-profile tournaments. Emphasizing sustainable tourism through eco-friendly initiatives and conservation efforts could further attract environmentally conscious travelers. Finally, leveraging digital marketing to target specific audience segments, promoting inclusivity through community engagement, and improving accessibility across attractions would help Palm Beach County broaden its appeal and better compete with Scottsdale for high-value visitors.



TAMPA + SARASOTA

FLORIDA

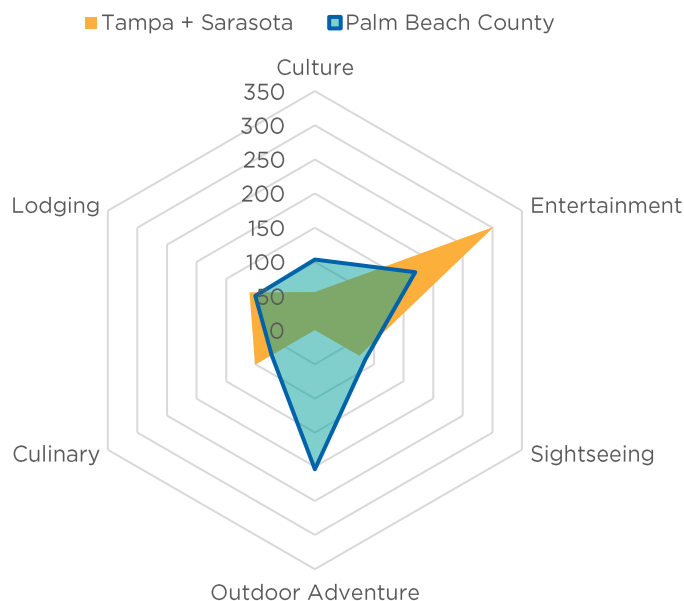


TAMPA + SARASOTA FLORIDA

Based on the size of Palm Beach County, CSL observed Tampa and Sarasota as a single tourism destination, more like the geographic makeup of Palm Beach County when combined.

Tampa + Sarasota offer a diverse tourism experience, combining cultural attractions, waterfront entertainment, sports tourism, and year-round events. With major festivals, professional sports teams, historic districts, and top-rated beaches, the region attracts a broad visitor base, including families, cultural travelers, and outdoor enthusiasts.

\$27,335,400 <i>(TAMPA BAY CVB)</i> \$1,736,800 <i>(VISIT SARASOTA CVB)</i>	12.00% <i>(6.00% COUNTY & 6.00% STATE)</i>	43.0 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



**WATERFRONT
RECREATION**



**CULTURAL ART
OFFERINGS**



**SIGNIFICANT
FESTIVALS FOCUSES**

TAMPA + SARASOTA FLORIDA

OVERALL TAKEAWAYS

- **Family and Multi-Generational Travel** – Busch Gardens, The Florida Aquarium, and Mote Marine Laboratory provide interactive attractions, while Siesta Key and Clearwater Beach offer family-friendly coastal escapes. Nathan Benderson Park hosts youth sports tournaments, drawing families for both leisure and competition.
- **Waterfront and Outdoor Recreation** – Tampa’s Riverwalk connects parks, dining, and attractions, while Sarasota’s Bayfront Park and Lido Key Beach offer scenic coastal recreation. Myakka River State Park provides eco-tourism with hiking, kayaking, and wildlife viewing.
- **Cultural and Arts Tourism** – The Ringling Museum, Sarasota Opera, and Asolo Repertory Theatre define Sarasota’s Cultural Coast®, while Ybor City, Henry B. Plant Museum, and Straz Center highlight Tampa’s history and performing arts.
- **Sports Tourism Dominance** – Tampa Bay Buccaneers, Lightning, and Rays attract major league sports fans, while Sarasota’s Nathan Benderson Park hosts elite rowing competitions. Spring Training, NCAA bowl games, and national youth tournaments add to the region’s sports appeal.
- **Festivals and Events** – Gasparilla Pirate Festival draws over 300,000 visitors, while Sarasota Film Festival, Riverfest, and Tampa Bay Margarita Festival add to the region’s year-round event calendar.
- **Business and Convention Travel** – Tampa Convention Center (similar in size to the Palm Beach County Convention Center) attracts large conferences, while Sarasota’s Ritz-Carlton and boutique resorts serve corporate retreats and executive meetings.
- **Eatertainment & Culinary Appeal** – Ybor City’s Cuban dining, Armature Works, Sparkman Wharf, and St. Armands Circle offer diverse culinary experiences, complemented by Tampa Bay Wine & Food Festival and Forks & Corks Sarasota.
- **Sustainability & Eco-Tourism** – Myakka River State Park, The Celery Fields, and Mote Marine Laboratory promote eco-tourism, while Tampa’s electric water taxis and green infrastructure enhance sustainable travel.
- **Competitive Urban & Resort Mix** – Tampa’s high-energy downtown contrasts with Sarasota’s relaxed Gulf Coast luxury, balancing vibrant nightlife with boutique beachside retreats.
- **High-Value Visitor Draws** – Luxury resorts like The Ritz-Carlton Sarasota and Tampa Edition, exclusive yacht charters, and VIP sports experiences attract affluent travelers, while fine arts, signature dining, and high-profile festivals elevate the region’s appeal.
- **Competing with Palm Beach County** – Tampa + Sarasota compete with Palm Beach County by offering a more diverse mix of family-friendly attractions, major sporting events, and waterfront entertainment, while still catering to luxury travelers through high-end resorts, fine dining, and cultural experiences.

PRIMARY ASSETS

Tampa + Sarasota offer a diverse mix of waterfront entertainment, cultural attractions, sports tourism, and major events, appealing to families, sports fans, and cultural travelers. Unlike Palm Beach County's mainly luxury focus, Tampa + Sarasota provide a broader visitor experience that blends urban energy with coastal leisure. Tampa Riverwalk connects top attractions like The Florida Aquarium, Amalie Arena, and Armature Works, while Siesta Key and Longboat Key beaches consistently rank among the best in the U.S. Ybor City's Cuban heritage and Sarasota's arts scene, anchored by The Ringling Museum and Sarasota Opera, highlight the region's cultural depth.

Sports tourism is a major draw, with Tampa hosting NFL, NHL, and MLB teams, alongside NCAA bowl games and Spring Training, while Sarasota's Nathan Benderson Park is a world-class rowing venue. Gasparilla Pirate Festival, along with Sarasota's arts and film festivals, further drives year-round visitation. Tampa + Sarasota's culinary scene spans Ybor City's Cuban dining, Armature Works' food halls, and Sarasota's upscale waterfront restaurants. Eco-tourism thrives with Myakka River State Park, The Celery Fields, and Mote Marine Laboratory offering outdoor recreation and conservation experiences.

Tampa + Sarasota share coastal leisure, cultural attractions, and high-end dining with Palm Beach County, attracting affluent travelers and eco-conscious visitors. Each destination offers renowned arts institutions, nature-based experiences, and a strong culinary scene. However, Tampa + Sarasota differs in key ways. Tampa is a major sports hub, hosting multiple professional teams, while Palm Beach County is more focused on golf, equestrian sports, and Spring Training. Tampa's festival scene, led by Gasparilla, is larger in scale, whereas Palm Beach's events tend to be more exclusive and high-end. Tampa's nightlife and entertainment districts offer a more vibrant urban experience, contrasting with Palm Beach County's relaxed luxury appeal. Lastly, Sarasota's strong branding as Florida's "Cultural Coast®" distinguishes it as a more arts-driven destination. These differences position Tampa + Sarasota as dynamic, multi-experiential destinations, attracting a wider visitor demographic compared to Palm Beach County's luxury and leisure-driven tourism focus.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Tampa + Sarasota are expanding their wellness offerings, with The Ritz-Carlton Sarasota and Tampa Edition featuring high-end spa and wellness services. Sarasota Memorial Hospital, consistently ranked among the best in Florida, is developing integrative wellness and recovery programs that could attract medical tourism. Additionally, Moffitt Cancer Center's expansion in Tampa positions the region as a hub for specialized healthcare tourism.

Immersive and Interactive Tourism: The Ringling Museum's digital exhibits and Tampa's Museum of Science & Industry (MOSI) interactive displays are already engaging visitors, but there is potential for AR-driven history tours in Ybor City and immersive art experiences in Sarasota's creative districts. Sparkman Wharf's projection mapping installations demonstrate how technology-driven experiences can enhance tourism appeal.

Authenticity and Cultural Enrichment: Ybor City celebrates its Cuban heritage through cigar-rolling demonstrations, historic walking tours, and the annual Cuban Sandwich Festival. Sarasota's "Cultural Coast" branding is reinforced by institutions like The Ringling and Sarasota Opera, but new Indigenous history exhibits and maritime heritage experiences could further elevate cultural tourism.

Sustainability and Eco-Tourism: Sarasota's eco-tourism infrastructure, including Myakka River State Park, The Celery Fields, and Mote Marine Laboratory's sea turtle conservation programs, attracts environmentally conscious travelers. Tampa is investing in electric water taxis and sustainable marina developments, while The Florida Aquarium's coral restoration efforts further reinforce the region's commitment to marine conservation.

Entertainment and "Eatertainment": Armature Works in Tampa, St. Armands Circle in Sarasota, and the growing food scene in Midtown Tampa highlight how the region blends dining with experience-driven entertainment. Tampa hosts Michelin-recognized restaurants, and Sarasota's Forks & Corks Festival showcases the region's culinary talent, reinforcing its emerging status as a foodie destination.

Outdoor Adventure and Sports Tourism: Tampa hosts Super Bowls, NHL championships, and NCAA bowl games, while Nathan Benderson Park in Sarasota draws elite rowing competitions. For adventure seekers, Tampa Bay's Stand-Up Paddleboarding (SUP) trails, Sarasota's mangrove kayaking experiences, and zip-lining at TreeUmph! Adventure Course provide additional outdoor tourism appeal.

Content Creation and Social Media Appeal: Tampa + Sarasota's vibrant landscapes and cultural landmarks, including the Tampa Riverwalk, The Ringling Museum, and Ybor City's street murals, are prime for content creation. Visit Tampa Bay's influencer partnerships and Sarasota's use of public art installations like the Unconditional Surrender statue help drive user-generated content and organic social media exposure.

Inclusivity and Accessibility in Travel: Tampa has strengthened LGBTQ+ tourism marketing, featuring Pride on the River and the annual Tampa Pride Festival. Sarasota's performing arts scene offers sensory-friendly programming at Van Wezel Performing Arts Hall, while both cities are expanding ADA-compliant public spaces and mobility-friendly transportation.

Multi-Generational Travel Appeal: Busch Gardens, The Florida Aquarium, and Mote Marine Laboratory cater to families, while Tampa's Riverwalk and Sarasota's luxury beach resorts provide multi-generational appeal. New family-friendly festivals like Sarasota's Chalk Festival and Tampa's Riverfest enhance offerings for visitors traveling with children and grandparents.

FUTURE TOURISM STRATEGIES

Tampa + Sarasota are actively investing in wellness and medical tourism, leveraging their coastal resorts, medical institutions, and integrative wellness programs to attract health-focused visitors. The Ritz-Carlton Sarasota and Tampa Edition continue to enhance luxury spa offerings, while Moffitt Cancer Center's expansion in Tampa and Sarasota Memorial Hospital's advancements in post-surgical rehabilitation and longevity programs are strengthening the region's medical tourism appeal. Plans for oceanfront wellness resorts and structured fitness and nutrition retreats are being explored to capitalize on the growing demand for health-conscious travel.

Event-driven tourism and waterfront development remain priorities, with both cities expanding large-scale festivals and entertainment districts. Tampa's Riverwalk is seeing increased activation through interactive art installations, expanded waterfront dining, and new event programming such as the Boom by the Bay fireworks festival. Sarasota is also focused on growing its seasonal arts and performance calendar at Bayfront Park and St. Armands Circle, creating more structured event experiences beyond peak tourism months. Sports tourism continues to expand, with Nathan Benderson Park securing more international rowing and triathlon events, while Tampa capitalizes on its hosting experience to attract new high-profile sporting events, like the Super Bowl.

Sustainability and eco-tourism efforts are evolving, with both cities working on integrating water taxis for waterfront transportation, promoting green-certified hotels, and expanding marine conservation tourism through programs at Mote Marine Laboratory and The Florida Aquarium. Tampa is also integrating smart tourism technology, including digital interactive experiences in historic areas like Ybor City, enhancing accessibility and engagement for tech-savvy travelers.

Family and multi-generational travel is another focus area, with efforts to enhance kid-friendly resort programming and immersive cultural festivals. Sarasota is expanding its Chalk Festival and interactive museum exhibits, while Tampa's enhanced Riverwalk attractions and family-friendly developments at Sparkman Wharf cater to visitors of all ages. International marketing campaigns targeting European, Canadian, and Latin American travelers are being expanded to position Tampa + Sarasota as a destination offering a well-balanced mix of cultural, outdoor, sports, and waterfront experiences for a broad audience.

HIGH VALUE VISITOR PREFERENCES: TAMPA + SARASOTA VS. PALM BEACH COUNTY

Palm Beach County decisively outperformed Tampa + Sarasota as the preferred place to live among most Mosaic segments, particularly those seeking exclusivity, financial advantages, and a refined luxury lifestyle. Segments such as "American Royalty," "Platinum Prosperity," and "Philanthropic Sophisticates" overwhelmingly favored PBC for its estate communities, elite social circles, and high-end cultural offerings. While "Across the Ages," "Babies and Bliss," and "Family Fun-Tastic" found Tampa + Sarasota appealing for their affordability, multi-generational appeal, and strong family-friendly environment, PBC remained the dominant choice for affluent individuals and families looking for prestige, financial incentives, and a well-established luxury market.

For visitation, Tampa + Sarasota attracted interest from family-oriented and history-seeking travelers, particularly "Kids and Cabernet," "Picture Perfect Families," and "Across the Ages," who were drawn to their mix of cultural attractions, waterfront entertainment, and recreational opportunities. However, PBC remained the preferred travel destination for high-net-worth individuals, with segments such as "Golf Carts and Gourmets" and "Sophisticated City Dwellers" favoring its premier golf resorts, yachting culture, and exclusive social scene. While Tampa + Sarasota offer a balanced mix of affordability and culture, PBC provides a more polished, high-end experience that makes it the stronger choice for luxury travelers and long-term affluent residents.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC due to its exclusivity, estate lifestyle, and elite social circles.
	Platinum Prosperity	PBC	PBC	PBC wins for both visiting and living due to its stable high-net-worth lifestyle, tax advantages, and premier luxury offerings.
	Kids and Cabernet	Tampa + Sarasota	PBC	Tampa + Sarasota provide a family-friendly coastal travel experience, but PBC is preferred for its upscale suburban environment and top-tier education.
	Picture Perfect Families	Tampa + Sarasota	PBC	Visits Tampa + Sarasota for its balanced family attractions but prefers PBC for its high-end communities and quality schools.
	Couples with Clout	PBC	PBC	PBC is the clear choice for both visiting and living, offering luxury, leisure, and an exclusive social scene.
	Jet Set Urbanites	PBC	PBC	PBC wins as both the preferred travel and living destination due to its high-end urban offerings and international connectivity.
FLOURISHING FAMILIES	Across the Ages	Tampa + Sarasota	Tampa + Sarasota	Tampa + Sarasota win as both a travel and living destination for their multi-generational appeal, affordability, and community-oriented environment.
	Babies and Bliss	Tampa + Sarasota	Tampa + Sarasota	Tampa + Sarasota offer an attractive family setting for both visiting and living, providing a mix of affordability and coastal charm.
	Family Fun-Tastic	Tampa + Sarasota	Tampa + Sarasota	Tampa + Sarasota are preferred for both visiting and living due to their variety of family entertainment, theme parks, and relaxed suburban feel.
	Cosmopolitan Achievers	PBC	PBC	PBC is the top choice for both visiting and living, offering a strong mix of career opportunities, cultural experiences, and a high standard of living.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	PBC	PBC wins as both a travel and living destination, providing an elegant, well-rounded metropolitan experience with a relaxed coastal vibe.
	Golf Carts and Gourmets	PBC	PBC	PBC is the clear winner for both visiting and living, offering premier golf courses, fine dining, and a refined leisure lifestyle.
	Philanthropic Sophisticates	PBC	PBC	PBC provides the best environment for year-round philanthropic engagement and deep community involvement.
	Boomers and Boomerangs	PBC	PBC	PBC remains the top choice for both visiting and living due to its warm climate, high-end retirement communities, and strong social scene.
	PALM BEACH WINS (OUT OF 14)	9	11	TAMPA + SARASOTA ARE FAMILY-FRIENDLY AND AFFORDABLE COASTAL GETAWAYS, BUT PBC DOMINATES IN LUXURY LIVING AND HIGH-END AMENITIES.

BENCHMARKING LESSONS

Palm Beach County can learn from Tampa + Sarasota's success in large-scale events, waterfront activation, sports tourism, and family-friendly experiences while maintaining its luxury identity. Signature events like Gasparilla Pirate Festival and the Sarasota Film Festival drive off-season tourism; Palm Beach could create or enhance a marquee festival or waterfront celebration to boost year-round visitation.

Waterfront activation is another key area. Tampa's Riverwalk and Sarasota's Bayfront Park integrate attractions, dining, and nightlife, enhancing visitor engagement. A walkable entertainment district in West Palm Beach could provide a similar experience, incorporating fine dining, interactive art, and cultural programming.

Expanding sports tourism beyond golf and equestrian events could also drive new visitation. Youth sports complexes, enhanced MLB Spring Training fan experiences, and additional multi-sport tournaments could position Palm Beach County as a more competitive destination. Additionally, more family-friendly attractions and curated resort experiences could help attract affluent families seeking engaging yet high-end vacation options.

While adopting these strategies, Palm Beach County should maintain its luxury brand by focusing on ultra-luxury waterfront dining, elite wellness retreats, and premium cultural events. By blending innovation with exclusivity, the county can elevate its appeal while preserving its identity as Florida's premier luxury destination.



THE HAMPTONS

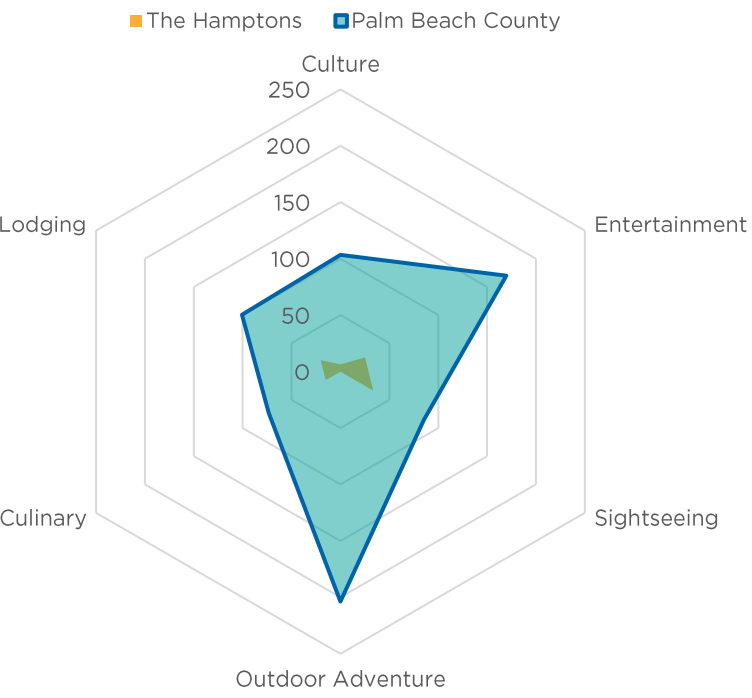
NEW YORK



THE HAMPTONS NEW YORK

The Hamptons is a globally recognized luxury coastal destination known for its exclusive social scene, high-end real estate, boutique accommodations, and affluent summer visitors. Its blend of secluded beaches, elite social events, and a deep-rooted artistic and cultural identity makes it one of the premier vacation retreats for wealthy New Yorkers, celebrities, and second homeowners.

\$4,040,000 <i>(DISCOVER LONG ISLAND CVB)</i>	14.38% <i>(4.00% STATE, 4.50% CITY, 5.88% OCCUPANCY) + \$1.50/UNIT</i>	16.9 MILLION
DMO BUDGET	HOTEL TAX	PLACER VISIT NIGHTS



INVITATION-ONLY EVENTS

HIGH ART

ULTRA LUXURY FOCUSES

THE HAMPTONS NEW YORK

OVERALL TAKEAWAYS

- **Exclusivity as a Core Identity** – The Hamptons thrives on invitation-only social events, private luxury experiences, and a curated elite atmosphere, ensuring its status as a seasonal retreat for ultra-high-net-worth individuals.
- **Second Home & Real Estate-Driven Tourism** – A significant portion of The Hamptons' economy is fueled by luxury real estate investment, with high-value seasonal properties attracting wealthy buyers and renters.
- **Elite Social & Philanthropy Tourism** – The region's private galas, high-profile charity events, and exclusive polo matches create a status-driven social calendar that reinforces its prestige.
- **Luxury Yachting & Maritime Culture** – High-end yacht clubs, exclusive sailing excursions, and private regattas define The Hamptons' waterfront scene, catering to affluent boat owners and maritime enthusiasts.
- **Boutique Cultural & Arts Prestige** – The Hamptons is home to elite arts institutions, private gallery events, and VIP art patron weekends, ensuring a continuous influx of high-net-worth cultural travelers.
- **Exclusive Culinary & Wine Tourism** – The region's farm-to-table dining scene, boutique wineries like Wölffer Estate, and private supper clubs emphasize refined, invitation-only gastronomy.
- **Seasonal Luxury Appeal** – The Hamptons has built its reputation on limited-access, high-status summer tourism, creating a sense of exclusivity that enhances its desirability among affluent travelers.

PRIMARY ASSETS

The Hamptons' tourism ecosystem is built on exclusivity, luxury, and seasonal prestige, attracting ultra-high-net-worth visitors through high-end real estate, elite social events, and boutique experiences. The region's multi-million-dollar estates in East Hampton, Southampton, and Sag Harbor serve as both private retreats and luxury vacation rentals, reinforcing its reputation as an invitation-only destination.

A defining feature is its elite social calendar, including the Hampton Classic Horse Show, private polo matches, and celebrity-hosted charity galas. These high-profile gatherings create an atmosphere of prestige and networking, drawing affluent travelers who seek status-driven experiences. The culinary and wine scene is equally exclusive, with intimate farm-to-table dining, boutique wineries like Wölffer Estate, and curated supper clubs that emphasize privacy and sophistication.

Maritime culture plays a central role, with exclusive yacht clubs, luxury marinas, and private sailing charters defining the waterfront experience. Events such as the Hamptons Cup and high-profile regattas attract an elite yachting community, further solidifying the region's luxury appeal. Additionally, The Hamptons' art and cultural scene, anchored by Guild Hall and the Parrish Art Museum, offers VIP art collector weekends, private gallery tours, and high-profile artist residencies.

Unlike mass-market destinations, The Hamptons thrives on low-density, high-value tourism, offering curated, invitation-only experiences that blend luxury, privacy, and status. This approach ensures that The Hamptons remains one of the most exclusive summer retreats in the U.S., catering to wealthy travelers who prioritize discretion and exclusivity.

RESPONDING TO TRENDS

Luxury Wellness & Longevity Retreats: The Hamptons has positioned itself as a premier destination for boutique wellness tourism, offering longevity retreats, holistic health programs, and private wellness residencies at properties like Shou Sugi Ban House. Visitors seek personalized experiences, including mindfulness training, anti-aging therapies, and in-home concierge wellness services that emphasize exclusivity and discretion. The demand for biohacking, spa detox programs, and luxury wellness experiences continues to grow, reinforcing The Hamptons as a sanctuary for affluent health-conscious travelers.

Second Home & Real Estate-Driven Tourism: A core driver of The Hamptons' economy is its seasonal real estate market, where multi-million-dollar estates serve as both status symbols and investment assets for ultra-high-net-worth individuals. The demand for private estate rentals, luxury home showcases, and exclusive real estate networking events fuels tourism and attracts buyers looking for secluded, high-end living experiences. The region's most sought-after enclaves—East Hampton, Southampton, and Sag Harbor—continue to attract finance executives, celebrities, and luxury property investors.

Elite Social Events & Philanthropy Tourism: The Hamptons thrives on high-profile, invitation-only galas, exclusive polo tournaments, and celebrity-led philanthropic events. The Hampton Classic Horse Show and Watermill Center Gala draw high-net-worth individuals, business moguls, and celebrities, creating a social calendar that reinforces exclusivity and status-driven tourism. Private fundraising weekends, luxury auction events, and VIP networking retreats ensure The Hamptons remains an elite gathering place for global influencers.

Luxury Yachting & Private Waterfront Experiences: With private marinas, exclusive sailing clubs, and high-profile regattas, The Hamptons has built a luxury maritime culture that attracts elite yachting enthusiasts. Sag Harbor and Montauk Yacht Club cater to private yacht owners, offering luxury dock-and-dine experiences, curated regatta events, and high-end charter services. The Hamptons' sailing culture is deeply tied to its status-driven appeal, ensuring a steady influx of maritime luxury travelers.

Ultra-Exclusive Culinary & Wine Tourism: The Hamptons' culinary scene is defined by boutique wineries, farm-to-table dining, and exclusive supper clubs. Wölffer Estate and Channing Daughters Winery offer private vineyard tours, invite-only wine tastings, and sommelier-led pairing experiences. High-end restaurants and celebrity chef-led dining events reinforce The Hamptons' reputation as a luxury food destination, where exclusivity and personalization elevate the visitor experience.

Boutique & High-End Art Patronage: The Hamptons is a prestigious art destination, attracting global collectors and high-profile investors through VIP collector weekends, private gallery exhibitions, and high-end art fairs. Institutions like Guild Hall and the Parrish Art Museum curate exclusive cultural experiences, while events like Art Southampton and the Hamptons Fine Art Fair cater to ultra-affluent art patrons and luxury brand collaborations.

Multi-Generational Luxury Travel: Affluent families visit The Hamptons for private estate stays, bespoke outdoor experiences, and exclusive recreational activities. Luxury sailing excursions, equestrian retreats, and concierge-planned itineraries ensure a high-end, multi-generational travel experience. Private family estates offer personal chefs, customized adventure programming, and members-only beach club access, making The Hamptons a top-tier destination for high-net-worth families seeking exclusivity and refinement.

FUTURE TOURISM STRATEGIES

The Hamptons is expanding off-season luxury tourism, wellness experiences, and cultural programming to sustain its elite appeal beyond summer. Boutique wellness retreats, longevity clinics, and private spa residencies are growing, with properties like Shou Sugi Ban House leading the trend in biohacking and holistic health programs.

Exclusive off-season art fairs, wine tastings, and private dining events are being developed to maintain visitor engagement, with institutions like Guild Hall and the Parrish Art Museum driving VIP collector weekends and curated exhibitions.

Luxury real estate tourism remains central, with developers offering private estate tours, high-end property showcases, and investment weekends to attract ultra-wealthy buyers. Yachting and waterfront real estate growth continue to reinforce The Hamptons' status as a premier second-home market.

The Hamptons is also refining targeted luxury marketing and invite-only influencer collaborations to strengthen its global reach and maintain its position as the top East Coast luxury retreat year-round.

HIGH VALUE VISITOR PREFERENCES: THE HAMPTONS VS. PALM BEACH COUNTY

Palm Beach County and The Hamptons emerged as two highly desirable destinations, but PBC outperformed as the preferred place to live among most Mosaic segments due to its year-round luxury lifestyle, financial advantages, and stronger economic benefits. Segments such as "Platinum Prosperity," "Golf Carts and Gourmets," and "Philanthropic Sophisticates" favored PBC for its estate properties, wealth-friendly tax policies, and high-end leisure offerings. However, The Hamptons was the preferred home for "American Royalty," "Cosmopolitan Achievers," and "Sophisticated City Dwellers," who value its deep-rooted high society traditions, seasonal exclusivity, and close ties to New York's elite social scene.

For visitation, The Hamptons was the clear favorite among segments such as "American Royalty," "Philanthropic Sophisticates," and "Cosmopolitan Achievers," who appreciated its summer-season prestige, yachting culture, and historic estates. However, PBC remained the dominant travel destination for those seeking a year-round luxury experience, with segments like "Kids and Cabernet" and "Family Fun-Tastic" favoring its premier golf courses, family-friendly resorts, and vibrant social calendar. While The Hamptons serves as a seasonal retreat for the ultra-wealthy, PBC offers a broader, more financially strategic, and accessible luxury lifestyle, making it the superior choice for long-term high-net-worth residency.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	The Hamptons	The Hamptons	The Hamptons offer an ultra-exclusive seasonal retreat, making it the preferred place for both visiting and living.
	Platinum Prosperity	The Hamptons	PBC	The Hamptons attract visitors with their elite summer culture, but PBC is preferred for year-round luxury living and wealth-friendly policies.
	Kids and Cabernet	PBC	PBC	PBC is the clear choice for both visiting and living, offering top-tier schools, a high-end suburban setting, and family-friendly amenities.
	Picture Perfect Families	PBC	PBC	PBC wins as the preferred place for both visiting and living, providing the perfect mix of affluence, safety, and a strong family-oriented community.
	Couples with Clout	The Hamptons	PBC	The Hamptons are a high-end seasonal escape, but PBC offers a more sustainable, prestigious, and tax-advantaged lifestyle for long-term living.
	Jet Set Urbanites	The Hamptons	PBC	The Hamptons provide a trendy summer retreat, but PBC is preferred for its high-end year-round urban conveniences and exclusivity.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC is the top choice for both visiting and living, offering multi-generational appeal and a strong luxury community.
	Babies and Bliss	PBC	PBC	PBC provides an ideal environment for young families with excellent schools, safe neighborhoods, and an upscale suburban lifestyle.
	Family Fun-Tastic	PBC	PBC	PBC is the preferred destination for both visiting and living, offering extensive family entertainment, outdoor activities, and a well-rounded community.
	Cosmopolitan Achievers	The Hamptons	The Hamptons	The Hamptons are an attractive summer destination, but also a desirable long-term home for this group seeking a balance of luxury and exclusivity.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	The Hamptons	The Hamptons	The Hamptons are the preferred choice for both visiting and living due to their prestige and seasonal high-society scene.
	Golf Carts and Gourmets	PBC	PBC	PBC wins as both the preferred travel and living destination, offering world-class golf courses, fine dining, and a strong leisure community.
	Philanthropic Sophisticates	The Hamptons	The Hamptons	The Hamptons provide an elite philanthropic retreat, making them the preferred place for both visiting and living among high-net-worth donors.
	Boomers and Boomerangs	PBC	PBC	PBC is the top choice for both visiting and living, with strong retirement appeal, upscale communities, and a thriving social scene.
	PALM BEACH WINS (OUT OF 14)	7	10	THE HAMPTONS IS A SOUGHT-AFTER SEASONAL RETREAT, YET PBC IS THE SUPERIOR CHOICE FOR YEAR-ROUND ELITE LIVING.

BENCHMARKING LESSONS

The Hamptons has established itself as a seasonal luxury enclave, driven by exclusive real estate, invitation-only social events, and a meticulously curated visitor experience. Its ability to cultivate prestige and controlled access reinforces its identity as a members-only destination that attracts ultra-high-net-worth individuals each summer. Palm Beach County, while offering a year-round luxury lifestyle, can draw from The Hamptons' strategy of exclusivity and refinement to enhance its own high-end visitor experiences.

One of The Hamptons' most effective strategies is leveraging real estate as both a tourism driver and an entry point into its elite social fabric. The emphasis on second-home investments, private estate rentals, and invitation-only property showcases ensures a steady influx of affluent residents who contribute to the seasonal economy. Palm Beach County, already a premier second-home destination, can further develop its real estate-driven tourism by curating luxury home-buying experiences, private investment summits, and ultra-exclusive property tours that highlight its unique coastal and golf communities.

Additionally, The Hamptons' high-status cultural and social tourism plays a key role in attracting its elite visitor base. Exclusive art patron weekends, high-profile polo matches, and intimate vineyard experiences provide tailored luxury for a discerning audience. Palm Beach County can expand its own cultural cachet by enhancing its collector-driven art scene, developing high-profile invitation-only social events, and curating luxury lifestyle experiences that align with its existing high-net-worth visitor base.

Another key takeaway is The Hamptons' success in marketing seasonal exclusivity as a luxury asset. By positioning its short peak season as a highly desirable, limited-access experience, The Hamptons creates an aura of scarcity and prestige. While Palm Beach County operates year-round, it can curate its own seasonal luxury experiences—such as exclusive winter retreats, invite-only wellness weekends, and high-net-worth networking events—that establish a sense of elite exclusivity during peak travel months.

While there are valuable lessons to draw from, Palm Beach County should maintain its distinct identity as a premier year-round luxury destination, rather than mirror The Hamptons' seasonal exclusivity. Palm Beach's strength lies in its unique blend of upscale leisure, waterfront lifestyle, world-class golf, and international accessibility. By enhancing its ultra-luxury offerings while embracing its own distinct social fabric and global appeal, Palm Beach County can attract The Hamptons' elite clientele as their winter counterpart—without compromising its individual brand.



MONACO

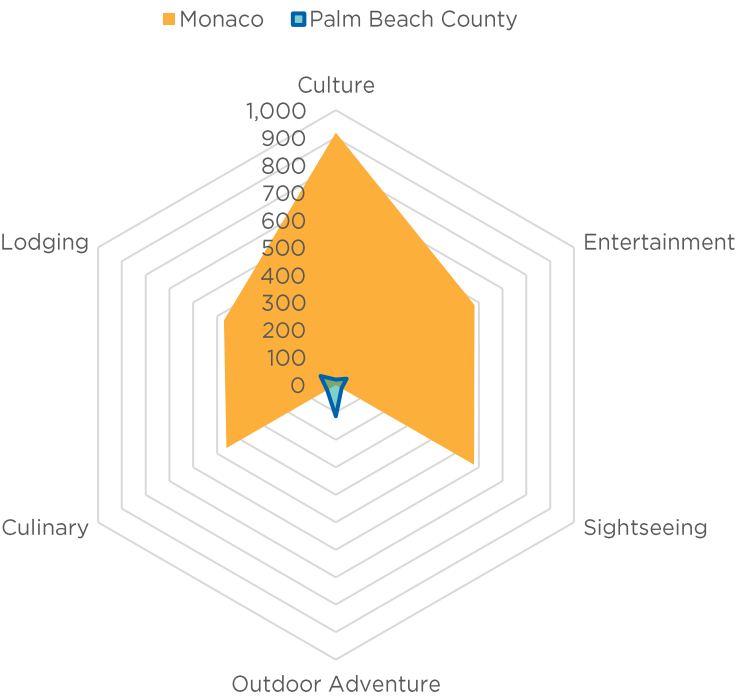
FRANCE



MONACO FRANCE

Monaco is the world’s premier ultra-luxury microstate, blending high-status events, elite social experiences, and exclusive entertainment with a backdrop of superyachts, Michelin-starred dining, and sustainable glamour, catering to the wealthiest travelers seeking prestige, opulence, and a tax-free playground.

N/A	UP TO \$15.50 PER NIGHT <i>(FLAT RATE)</i>	340,000 <i>(2023)</i>
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



HIGH-END EXPERIENTIAL DINING



AGGRESSIVE SUSTAINABILITY INITIATIVES



HIGH-VALUE MEETINGS / CONVENTION SECTOR



EXCLUSIVE / LUXURY EXPERIENCES

OVERALL TAKEAWAYS

- **Luxury & High-End Events Drive Monaco's Global Prestige:** Monaco's flagship events like the Formula 1 Grand Prix, Monte-Carlo Masters, and Monaco Yacht Show solidify its status as a luxury travel hub, attracting high-net-worth individuals from around the world.
- **Business & Conference Tourism is a Key Growth Sector:** The Grimaldi Forum has positioned Monaco as a premier conference and business tourism destination, hosting luxury trade summits and high-profile exhibitions that bring in over 250,000 visitors annually.
- **Sustainability is a Core Pillar of Monaco's Tourism Strategy:** Initiatives like the Mareterra eco-district, carbon-neutral hospitality, and marine conservation programs demonstrate Monaco's commitment to sustainable luxury tourism.
- **Cultural Tourism Enhances Year-Round Appeal:** Monaco hosts exclusive cultural festivals, film events, and immersive historical experiences, leveraging its royal heritage and global influence to attract elite travelers beyond just its peak seasons.
- **Experiential Dining & 'Eatertainment' Set Monaco Apart:** The Principality's high-end restaurants merge fine dining with entertainment, such as Buddha-Bar's fusion of live DJs and gastronomy, and the outdoor and immersive supper club concepts at Amazónico or Blue Bay Marcel Ravin.
- **Technology & AI Integration is Reshaping Tourism Operations:** Monaco has implemented AI-powered security and visitor analytics at the Grimaldi Forum, while the Monaco Artificial Intelligence Conference showcases the role of advanced tech in tourism management.
- **Palm Beach County Can Elevate Its Luxury Branding to Compete:** Strengthening signature luxury events, Michelin-starred dining, yacht and aviation incentives, and high-end private membership clubs would help Palm Beach County attract Monaco's high-net-worth visitor base.
- **Eco-Luxury & Wellness Tourism Offer Growth Opportunities:** Expanding sustainable hotel initiatives, curated wellness retreats, and ocean conservation programs would position Palm Beach County as a luxury destination that blends affluence with environmental responsibility, much like Monaco.

PRIMARY ASSETS

Monaco, long a symbol of luxury tourism, has expanded its appeal through sports tourism, business events, cultural initiatives, and sustainability efforts. Iconic events like the Formula 1 Monaco Grand Prix, Monte-Carlo Masters, and Monaco Yacht Show continue to draw global audiences, while the Principality strengthens its sports development programs and bids for World Capital of Sport 2025. Meanwhile, the Grimaldi Forum has positioned Monaco as a major conference and business tourism hub, hosting high-profile exhibitions and luxury trade summits that attract 250,000 visitors annually.

Beyond business and sports, Monaco excels in elite cultural tourism, hosting events like the Monte-Carlo Television Festival and International Circus Festival, while enhancing its historic landmarks, such as the restored Renaissance frescoes at the Prince's Palace. Sustainability is also a growing focus, with initiatives like the Mareterra eco-district, sustainable whale watching, and carbon-neutral hospitality policies, reinforcing Monaco's commitment to responsible tourism.

UNIQUE ASSETS

Monaco has successfully implemented several innovative tourism initiatives that could enhance Palm Beach County's appeal. The Principality's commitment to sustainable tourism is evident in initiatives like the White Paper on Sustainable Tourism, eco-friendly transportation, and urban farming projects such as Terre de Monaco, which integrates organic agriculture into urban spaces. Palm Beach County could adopt similar programs by promoting green building certifications, expanding eco-certified hotels, and improving public transportation with bike-sharing and electric mobility solutions. Additionally, marine conservation efforts like the Monaco Blue Initiative highlight the importance of protecting coastal ecosystems—something Palm Beach County could replicate through educational tours and sustainable water-based activities.

Beyond sustainability, Monaco has excelled in luxury and cultural tourism by hosting exclusive events such as the Monte-Carlo Television Festival and developing high-end wellness retreats. Palm Beach County could enhance its global reputation by curating elite cultural festivals, attracting international culinary and wellness tourism, and capitalizing on off-season business travel and gastronomy-focused events.

RESPONDING TO TRENDS

Wellness Tourism: Monaco has long been a destination for wellness enthusiasts, offering luxurious spas and wellness centers. The Thermes Marins Monte-Carlo, for instance, provides state-of-the-art treatments and therapies, attracting visitors seeking relaxation and rejuvenation.

Immersive & Transformative Experiences: The Principality offers immersive cultural events, such as the annual Monte-Carlo Jazz Festival, which provides attendees with deep, enriching musical experiences. Additionally, Monaco's museums and galleries often host interactive exhibitions, allowing visitors to engage actively with art and history.

Authenticity & Sustainability: Monaco is committed to sustainable tourism, implementing eco-friendly initiatives to preserve its environment. The government has introduced policies to reduce carbon emissions and promote biodiversity, ensuring that tourism development aligns with ecological preservation.

Technology and AI Integration: Monaco is leveraging AI to enhance tourism and event experiences, with innovations like the Grimaldi Forum's AI-powered security system optimizing visitor flow and operations, while annual events like the Monaco Artificial Intelligence Conference showcase the Principality's commitment to advancing AI across multiple sectors.

Medical Tourism: With its world-class medical facilities and wellness centers, Monaco attracts visitors seeking high-quality healthcare services. The Principality offers specialized treatments and medical procedures, positioning itself as a hub for medical tourism.

Outdoor Adventure & Glamping: While Monaco is renowned for its luxury hotels, it has also explored unique accommodation offerings. Innovative lodging experiences, such as luxury yacht stays, provide visitors with distinctive and memorable stays.

Photo Opportunities and Content Creation: The picturesque scenery of Monaco, from the iconic Casino de Monte-Carlo to the Prince's Palace, offers abundant photo opportunities. The tourism board actively encourages content creation by highlighting Instagram-worthy spots and supporting influencer collaborations.

Inclusiveness & Multi-Generational Travel: Monaco caters to travelers of all ages, offering family-friendly attractions like the Oceanographic Museum and events suitable for different generations. The Principality ensures accessibility and inclusivity in its tourism offerings, making it an appealing destination for multigenerational families.

TOURISM STRATEGIES

Monaco has been actively refining its tourism strategies, focusing on sustainability, diversification, infrastructure development, and targeted marketing to enhance its global appeal. The Principality is committed to sustainable tourism, aiming for carbon neutrality by 2050 and implementing eco-friendly initiatives like soft mobility programs and green-certified hotels. It is also expanding beyond its traditional luxury and gaming sectors, promoting cultural tourism, business events, and sustainable cruising to attract a more diverse visitor base. At the same time, Monaco is modernizing its conference facilities, transportation networks, and waterfront areas to accommodate increasing tourism demand while maintaining its status as a high-end destination.

Palm Beach County, with its affluent visitor base and strong tourism infrastructure, can adopt several of Monaco's strategies to elevate its appeal. Expanding sustainable tourism practices through green-certified hotels, eco-friendly public transport, and carbon-neutral initiatives would align with the growing demand for responsible travel. Additionally, diversifying tourism by strengthening heritage tourism, expanding sports and youth tourism, and attracting high-end cruise lines could make Palm Beach more competitive with Monaco's well-rounded offerings. Infrastructure improvements, such as luxury waterfront developments and enhanced private aviation services, could also help position the county as a top-tier destination for high-net-worth travelers.

To further compete with Monaco, Palm Beach County could enhance its global branding efforts by forging strategic partnerships with luxury brands, private aviation companies, and international airlines to attract elite travelers. Additionally, expanding high-end farm-to-table dining experiences, sustainable seafood initiatives, and eco-friendly culinary festivals would align with Monaco's emphasis on responsible gastronomy. While Palm Beach County already offers a prestigious lifestyle, implementing these strategies would solidify its reputation as North America's premier luxury coastal retreat, blending affluence, sustainability, and cultural richness to attract a more global and discerning audience.

HIGH VALUE VISITOR PREFERENCES: MONACO VS. PALM BEACH COUNTY

Monaco stands as an elite playground for high-net-worth travelers, cultural enthusiasts, and urban sophisticates seeking unparalleled exclusivity, glamour, and high-end experiences. Its prestige attracts Jet Set Urbanites, Couples with Clout, and Cosmopolitan Achievers, who prioritize short-term luxury vacations filled with world-class events, fine dining, and opulent entertainment. However, when it comes to long-term living, Palm Beach County dominates across all demographics, offering a more sustainable and practical luxury lifestyle. With diverse real estate options, financial stability, strong infrastructure, family-friendly communities, and top-tier healthcare, Palm Beach County provides a well-rounded environment that Monaco, with its compact urban setting and limited residential appeal, cannot match.

For multi-generational travelers, families, and retirees, Palm Beach County emerges as the clear winner for both visiting and living, thanks to its spacious suburban amenities, family-friendly attractions, and retirement-friendly infrastructure—elements that Monaco largely lacks. Meanwhile, golfers, foodies, and cultural travelers split their preferences between the two destinations, with Monaco excelling in high-end art, cultural festivals, and luxury gastronomy, while Palm Beach County takes the lead in world-class golf, philanthropy, and long-term cultural engagement. Ultimately, Monaco remains an unparalleled short-term luxury vacation hub, while Palm Beach County solidifies itself as a premier long-term luxury lifestyle destination, offering both exclusivity and livability in ways that Monaco cannot replicate.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Monaco	PBC	Prefers to visit Monaco for its exclusive luxury scene but lives in PBC for its expansive estates, private clubs, and tax benefits.
	Platinum Prosperity	Monaco	PBC	Visits Monaco for its elite social scene but lives in PBC for its wealth-friendly policies and year-round coastal luxury.
	Kids and Cabernet	PBC	PBC	Chooses PBC for both visiting and living due to its family-friendly upscale lifestyle and top-tier schools.
	Picture Perfect Families	PBC	PBC	PBC offers the ideal mix of affluent suburban living, safety, and leisure amenities.
	Couples with Clout	Monaco	PBC	Visits Monaco for its glamour but settles in PBC for its refined, relaxed luxury and philanthropic community.
	Jet Set Urbanites	Monaco	Monaco	Prefers Monaco for both visiting and living, drawn to its high-energy cosmopolitan lifestyle and global connections.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC is the choice for both visiting and living due to its generational appeal and strong community ties.
	Babies and Bliss	PBC	PBC	PBC offers an ideal environment for young families, with spacious homes, excellent schools, and outdoor activities.
	Family Fun-Tastic	PBC	PBC	PBC wins for both visiting and living, as it offers family-friendly entertainment, parks, and suburban convenience.
	Cosmopolitan Achievers	Monaco	PBC	Visits Monaco for its prestige but prefers PBC for career growth, cultural diversity, and a high standard of living.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Monaco	PBC	Monaco appeals for travel due to its urban luxury, but PBC is preferable for a high-end yet balanced lifestyle.
	Golf Carts and Gourmets	PBC	PBC	PBC suits their leisure-oriented, retirement-friendly lifestyle with top-tier golf and dining experiences.
	Philanthropic Sophisticates	Monaco	PBC	Monaco is ideal for global networking and elite charity events, but PBC offers a vibrant philanthropic scene and year-round giving opportunities.
	Boomers and Boomerangs	Monaco	PBC	PBC is the preferred living choice for its family-oriented communities, warm climate, and strong multi-generational appeal.
	PALM BEACH WINS (OUT OF 14)	6	13	MONACO IS A PRESTIGIOUS TRAVEL DESTINATION FOR ULTRA-HIGH-NET-WORTH INDIVIDUALS, BUT PBC IS THE PREFERRED PLACE TO LIVE DUE TO TAX ADVANTAGES AND ESTATE LIVING.

BENCHMARKING LESSONS

To compete with Monaco's elite tourism market, Palm Beach County must elevate its luxury offerings, exclusivity, and high-end experiences. Expanding signature events could be considered, which could involve transforming the Palm Beach International Boat Show into a globally recognized superyacht event or introducing a luxury motorsports race inspired by the Monaco Grand Prix. Similarly, refining SunFest into an international VIP music and arts festival with yacht moorings, fine dining, and luxury hospitality can raise the region's prestige.

Additionally, Palm Beach County could build on Miami's recent Michelin Guide growth and focus on attracting Michelin-starred chefs, expanding high-end resort brands, and developing exclusive private membership clubs, all of which align with Monaco's reputation for exclusivity and social prestige. High-status experiential tourism, including invite-only yacht excursions, concierge-led mansion tours, and private polo events, could further distinguish Palm Beach as a destination that caters to high-net-worth visitors.

Beyond events and luxury accommodations, Palm Beach County must strengthen its global brand and marketing strategy by leveraging influencer collaborations, private aviation partnerships, and presence at international luxury travel fairs. Positioning West Palm Beach as a luxury fintech hub and attracting more business conferences targeting high-net-worth investors can also help compete with Monaco's role as an elite business destination. Additionally, Palm Beach County has an opportunity to develop eco-luxury tourism, investing in sustainable hotels, ocean conservation initiatives, and eco-friendly yacht experiences to attract environmentally conscious affluent travelers.

Finally, one of Monaco's standout tourism assets is "Eatertainment," which merges fine dining with immersive entertainment. Palm Beach County can introduce its own multi-sensory dining experiences, high-end supper clubs, and fashion-meets-gastronomy events to compete with Monaco's dynamic culinary scene. This could include transforming an existing high-end restaurant into an interactive, performance-driven venue similar to Buddha-Bar Monte Carlo or developing a 1920s Gatsby-inspired supper club that combines luxury dining with live music, aerial performances, and immersive storytelling. By enhancing signature events, culinary experiences, global branding, and sustainable tourism, Palm Beach County can position itself as North America's answer to Monaco, capturing more of the ultra-luxury travel market while maintaining its distinct coastal identity.



ST. BARTS

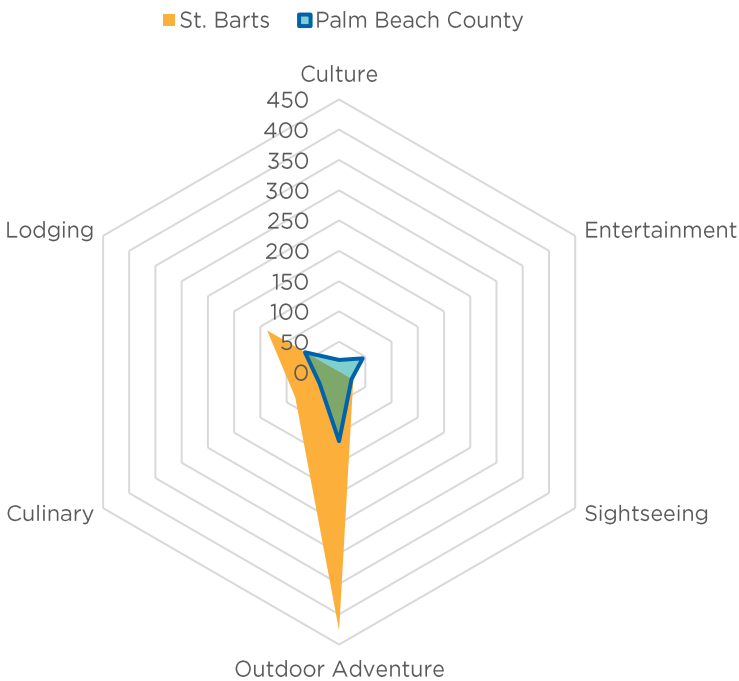
FRENCH WEST INDIES



ST. BARTS FRENCH WEST INDIES

St. Barts is an ultra-exclusive, boutique luxury destination that blends pristine natural beauty, elite yachting culture, high-end gastronomy, and curated cultural experiences, catering to affluent travelers seeking privacy, indulgence, and sophistication in an intimate Caribbean paradise.

N/A	5.0%	200,000
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



**SECLUDED BEACH
ESCAPE**



**ULTRA HIGH-END &
UNIQUE FESTIVALS**



**WELLNESS RETREAT
DESTINATION**

ST. BARTS FRENCH WEST INDIES

OVERALL TAKEAWAY

- **Ultra-Luxury Tourism:** The island’s exclusive resorts, high-end dining, yachting culture, and boutique events make it a top destination for affluent travelers seeking privacy and curated experiences. Its limited accessibility and high price point reinforces its elite status.
- **Accessibility and Seasonality Challenges:** St. Barts faces barriers such as limited direct flights, high costs, vulnerability to hurricanes, and seasonal fluctuations. While exclusivity is a strength, maintaining year-round visitation without straining resources is a challenge.
- **Sustainability As a Strategy:** The island prioritizes eco-friendly luxury tourism, integrating marine conservation, renewable energy projects, and sustainable accommodations to preserve its pristine environment while maintaining high-end appeal.
- **Experiential and Wellness Tourism on The Rise:** St. Barts has successfully capitalized on global wellness trends by offering luxury spas, yoga retreats, and holistic health programs alongside adventure-based eco-tourism such as hiking, snorkeling, and marine conservation experiences.
- **Transferability to Palm Beach County:** Palm Beach County can enhance exclusive experiences by introducing private beach clubs, high-end regattas, boutique cultural festivals, and luxury villa rentals with concierge services to attract high-net-worth visitors.

PRIMARY ASSETS

St. Barts stands out as a premier luxury tourism destination, offering pristine beaches, high-end accommodations, and a rich cultural heritage that blends French sophistication with Caribbean charm. The island’s commitment to environmental conservation is evident through initiatives like the St. Barthelemy Nature Reserve, ensuring sustainable tourism that protects its marine and natural beauty. Visitors are drawn to St. Barts for its world-class gastronomy, exclusive resorts, and immersive cultural experiences, including elite sailing events, boutique music festivals, and intimate film screenings, all of which reinforce its reputation as a high-end getaway.

However, St. Barts faces several challenges that impact its long-term sustainability as a tourism destination. Accessibility remains a barrier due to limited direct flights, requiring travelers to connect through other islands, while its ultra-luxury price tag makes it an option primarily for affluent visitors. Additionally, the island’s vulnerability to hurricanes, water scarcity issues, and seasonal fluctuations in tourism demand create ongoing economic and environmental concerns. While St. Barts’ exclusivity is its biggest strength, it also presents a challenge in maintaining steady year-round tourism without overburdening its natural resources.

To address these challenges, St. Barts is actively diversifying its tourism offerings through eco-conscious initiatives, curated wellness retreats, and exclusive cultural events that encourage year-round visitation. The Territorial Tourism Committee has focused on balancing luxury with sustainability, expanding high-end experiential travel while protecting the island's fragile ecosystem. Compared to Palm Beach County, which thrives on large-scale tourism infrastructure, business conventions, and family-friendly attractions, St. Barts remains a niche, ultra-luxury destination catering to discerning travelers seeking privacy, exclusivity, and high-touch, curated experiences.

TRANSFERRABLE ASSETS

Palm Beach County can elevate its luxury tourism appeal by adapting key initiatives from St. Barts, particularly in culinary, wellness, and cultural experiences. The St. Barth Gourmet Festival has successfully positioned the island as a high-end gastronomic destination, a strategy Palm Beach County could replicate by hosting exclusive culinary festivals and pop-up dining experiences featuring Michelin-starred chefs. Additionally, the county's natural landscapes provide an ideal backdrop for luxury wellness retreats, incorporating holistic health programs, spa treatments, and yoga experiences tailored to affluent travelers. Boutique music and art festivals, similar to the St. Barth Music Festival, could offer intimate cultural experiences, distinguishing Palm Beach from large-scale mainstream events.

St. Barts' strong maritime and luxury lifestyle offerings also present inspiration for Palm Beach County. High-end sailing regattas could attract affluent yachting enthusiasts, reinforcing the county's waterfront identity, while exclusive beach clubs and private villa rentals with concierge services would further enhance the area's luxury appeal. Sustainability is another area of opportunity—eco-conscious luxury accommodations, similar to those in St. Barts, could help Palm Beach position itself as a leader in upscale, responsible tourism. Additionally, hosting high-profile fashion events and offering VIP airport services would align Palm Beach with the elite travel experience that defines St. Barts, appealing to the ultra-affluent demographic. By integrating these elements, Palm Beach County could reinforce its status as a premier high-end destination while offering a broader range of luxury experiences than St. Barts.

RESPONDING TO TRENDS

Wellness and Transformative Experiences: St. Barts has become a haven for wellness enthusiasts, offering luxury spas, yoga retreats, and holistic health programs. Resorts like Le Barthélemy Hotel & Spa have achieved Green Globe certification, blending luxury with sustainability to provide transformative wellness experiences.

Authenticity and Cultural Immersion: The island emphasizes its unique cultural heritage by promoting local art, music, and cuisine. Events such as the St. Barth Music Festival and the St. Barth Gourmet Festival allow visitors to engage deeply with the island's traditions, offering authentic and immersive experiences.

Sustainability Initiatives: St. Barts is committed to sustainable tourism, implementing projects focused on renewable energy, waste management, and water conservation. For instance, the island has developed a waste treatment facility that converts trash into water vapor, generating electricity.

Exclusive and Premium Event Experiences: Catering to a high-end clientele, St. Barts hosts exclusive events like the St. Barths Bucket Regatta, attracting luxury yacht enthusiasts. These premium experiences reinforce the island's reputation as a luxury destination.

Technology Integration: While specific advancements in technology and AI are not prominently highlighted, the island has embraced technology in areas like water conservation. For example, Le Barthélemy Hotel & Spa utilizes AQUAchiara technology to produce potable water, reducing reliance on imported plastic bottles.

Outdoor and Adventure Tourism: St. Barts offers eco-friendly attractions such as hiking in the untouched hills of Colombier and snorkeling in the Marine Reserve, allowing visitors to enjoy the island's natural beauty responsibly.

TOURISM STRATEGIES

Over the past five years, St. Barts has focused on maintaining its ultra-luxury appeal, expanding cultural and culinary events, and promoting sustainability. The island continues to attract affluent travelers through high-end accommodations, exclusive shopping, and refined gastronomy, reinforced by events like the St. Barth Music Festival and Gourmet Festival. Additionally, St. Barts has strengthened its eco-tourism efforts, investing in renewable energy, waste management, and conservation initiatives to preserve its pristine environment. The rise of wellness and outdoor tourism has also influenced the island's offerings, with luxury spas, yoga retreats, and adventure experiences enhancing its appeal to high-end travelers seeking relaxation and nature-based activities.

Palm Beach County can apply many of these strategies to elevate its own luxury tourism brand, particularly by curating exclusive events, enhancing sustainability, and expanding wellness experiences. While Palm Beach already caters to high-net-worth individuals, it could further refine its image through private beach clubs, premium yacht services, and boutique high-end experiences. Similarly, Palm Beach's strong arts and culinary scene could benefit from small-scale, exclusive cultural festivals featuring top chefs and globally recognized artists. Sustainability also presents a key opportunity—developing eco-luxury accommodations, high-end conservation-focused retreats, and "Green Luxury" certifications would align with global trends in responsible tourism.

To further distinguish itself, Palm Beach County could leverage technology and personalization to enhance visitor experiences. AI-driven concierge services, customized itinerary apps, and VIP airport services could make luxury travel to the region more seamless and tailored. Additionally, the county could expand medical tourism and high-end wellness programs, positioning itself as a premier East Coast wellness destination. By integrating St. Barts' exclusivity and experiential luxury into a more accessible, year-round tourism model, Palm Beach County can further strengthen its position as a top-tier luxury destination.

HIGH VALUE VISITOR PREFERENCES: ST. BARTS VS. PALM BEACH COUNTY

The comparative analysis highlights a clear distinction between St. Barts as an elite vacation destination and Palm Beach County as a versatile, year-round hub for diverse travelers. St. Barts excels in catering to affluent, high-status visitors, particularly ultra-wealthy elites, high-net-worth professionals, and cultural travelers, who seek exclusivity, fine dining, yachting culture, and boutique luxury experiences. Its appeal lies in seclusion, high-end service, and immersive indulgence, making it the preferred choice for affluent couples, sophisticated city dwellers, and jet-set urbanites looking for a short but opulent retreat. However, St. Barts is far less accommodating for families, multi-generational travelers, and budget-conscious visitors, as it lacks large-scale attractions, affordable accommodations, and family-friendly infrastructure.

Palm Beach County, by contrast, offers a broader and more accessible luxury tourism experience, making it the top choice for families, golfers, middle-class travelers, and retirees. Its strong golf culture, expansive beaches, equestrian scene, and family attractions ensure it caters to a wider audience than St. Barts. Additionally, Palm Beach's mix of culinary festivals, cultural institutions, and high-end retail experiences rivals those of St. Barts but with greater accessibility and diversity. While Palm Beach lacks the same level of exclusivity and intimacy as St. Barts, its larger scale, infrastructure, and year-round appeal position it as a more practical luxury destination for a wider range of demographics. Ultimately, St. Barts dominates in exclusivity and ultra-luxury, while Palm Beach County succeeds in balancing high-end offerings with accessibility and diversity.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	St. Barts	PBC	Visits St. Barts for its ultra-exclusive, jet-set ambiance but prefers PBC for its year-round luxury, financial perks, and estate lifestyle.
	Platinum Prosperity	St. Barts	PBC	St. Barts is an alluring travel destination for its elite social scene, but PBC provides a stable, high-end living environment with top-tier amenities.
	Kids and Cabernet	PBC	PBC	PBC wins for both visiting and living due to its upscale suburban appeal, excellent schools, and family-friendly atmosphere.
	Picture Perfect Families	PBC	PBC	PBC is the top choice for families seeking luxury, stability, and a well-rounded community with access to top schools.
	Couples with Clout	St. Barts	PBC	St. Barts is appealing for its high-end leisure experiences, but PBC is the preferred home for its refined yet relaxed luxury.
	Jet Set Urbanites	St. Barts	PBC	St. Barts is an exciting destination for elite travelers, but PBC offers long-term benefits with a well-connected, high-end urban lifestyle.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC is the preferred choice for both visiting and living, offering strong multi-generational appeal and a vibrant luxury community.
	Babies and Bliss	PBC	PBC	PBC provides an ideal environment for young families, with quality schools, safety, and high-end suburban living.
	Family Fun-Tastic	PBC	PBC	PBC wins as both the best vacation and long-term home for families, with ample entertainment, outdoor activities, and a well-rounded community.
	Cosmopolitan Achievers	St. Barts	PBC	St. Barts is an exclusive retreat for affluent travelers, but PBC offers a more balanced lifestyle with career opportunities and elite social circles.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	St. Barts	PBC	St. Barts is an exciting getaway for high-net-worth individuals, but PBC is a more practical and culturally rich place to settle.
	Golf Carts and Gourmets	PBC	PBC	PBC is the top choice for both visiting and living, providing premier golf experiences, fine dining, and an upscale leisure lifestyle.
	Philanthropic Sophisticates	St. Barts	PBC	St. Barts is an international hub for elite philanthropy, but PBC offers deep-rooted community involvement and year-round giving opportunities.
	Boomers and Boomerangs	St. Barts	PBC	St. Barts is a beautiful vacation retreat, but PBC wins as the best place to live for retirees seeking warm weather, social engagement, and luxury comforts.
	PALM BEACH WINS (OUT OF 14)	6	14	ST. BARTS IS AN ELITE SEASONAL RETREAT FOR THE ULTRA-WEALTHY, BUT PBC IS THE PREFERRED PLACE TO LIVE DUE TO ITS FINANCIAL BENEFITS AND LUXURY INFRASTRUCTURE.

BENCHMARKING LESSONS

Palm Beach County has the opportunity to expand its short-term tourism appeal by attracting demographics that currently favor the Gold Coast, such as young professionals, adventure travelers, theme park-seeking families, and nightlife enthusiasts. One of the most impactful initiatives would be the development of a signature adventure and water park experience, positioning Palm Beach as a destination for high-energy, multi-generational entertainment. By leveraging its water-based recreation strengths, the county could introduce an innovative surf park, deep-sea diving simulators, and artificial reef experiences, potentially partnering with global entertainment brands like Universal or Disney to create immersive attractions. Additionally, expanding festival and event tourism could generate significant visitor demand, with potential for a world-class surf festival, a Palm Beach Air & Water Show, or an extreme sports series. Enhancing marketing efforts for existing events like SunFest would also help increase international appeal and drive higher visitor spending.

Beyond adventure and events, Palm Beach County could enhance nightlife, outdoor tourism, and hospitality offerings to appeal to younger and experience-driven travelers. Establishing a high-end waterfront entertainment district with rooftop lounges, live music venues, and immersive nightlife experiences would help consolidate and elevate the county's entertainment scene. In parallel, adventure and eco-tourism could be strengthened through zip-lining parks, luxury glamping sites, and structured outdoor excursions in natural areas like Jupiter or Loxahatchee. The county could also modernize its hospitality sector by introducing experiential boutique hotels, co-living spaces for digital nomads, and urban resorts in areas like West Palm Beach and Delray Beach.



ABU DHABI

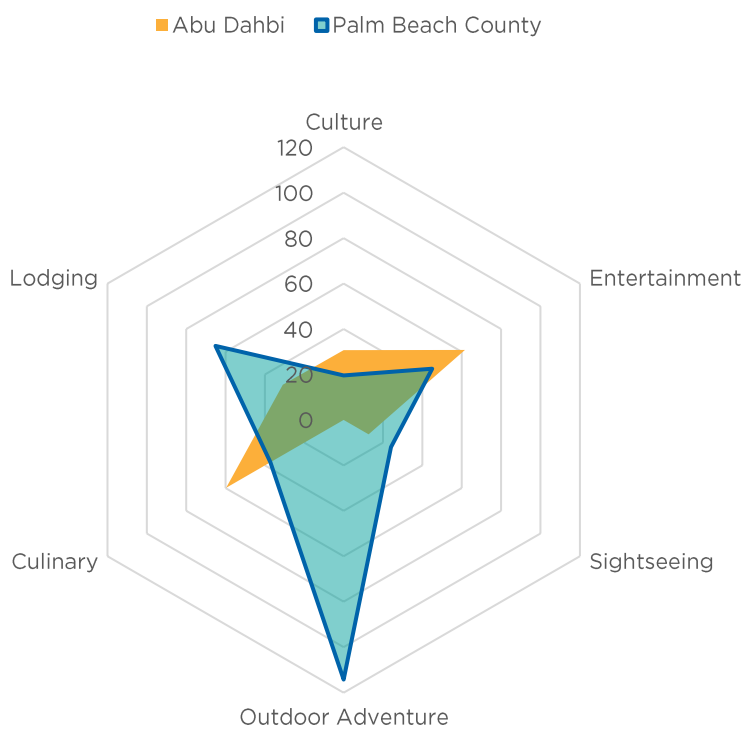
UNITED ARAB EMIRATES



ABU DHABI UNITED ARAB EMIRATES

Abu Dhabi stands out as a world-class tourism destination, renowned for its ultra-luxury resorts, cutting-edge cultural institutions, and immersive desert and waterfront experiences that blend tradition with modern sophistication.

\$45 MILLION <i>(PER YEAR AVERAGE 2017-2019 ABU DHABI TOURISM & CULTURE AUTHORITY)</i>	23.00%	24 MILLION <i>(2023)</i>
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



- 
CURATED LUXURY
- 
DESERT & SEA ADVENTURES
- 
CULTURAL PRESTIGE
- 
GLOBAL TOURISM
- 
THRILLING SPECTACLE

ABU DHABI UNITED ARAB EMIRATES

OVERALL TAKEAWAYS

- **Sports & Entertainment Hub:** Abu Dhabi hosts world-class sporting events, including Formula 1, UFC at Etihad Arena, and the Liwa Moreeb Dune Festival, reinforcing its reputation as a global sports tourism destination.
- **Cultural Powerhouse:** The emirate has invested in the Louvre Abu Dhabi, Sheikh Zayed Grand Mosque, and the upcoming Guggenheim Abu Dhabi, establishing itself as a premier cultural and artistic hub.
- **Luxury & Experiential Tourism:** High-end experiences like VIP desert safaris, yacht excursions, and luxury wellness retreats cater to ultra-wealthy travelers seeking curated, exclusive getaways.
- **Eco-Tourism & Natural Attractions:** Mangrove National Park and Saadiyat Island's pristine beaches provide a balance between urban luxury and conservation-focused tourism.
- **Innovative Theme Parks & Attractions:** With Warner Bros. World, Ferrari World, and the upcoming Harry Potter theme park at Yas Island, Abu Dhabi is positioning itself as a competitor to major global theme park destinations.
- **High-Impact Marketing & Branding:** Abu Dhabi leverages sponsorships (New York Knicks), influencer partnerships, and digital tourism campaigns to maintain global visibility and attract high-value visitors.
- **Seamless Luxury Hospitality & Travel:** The emirate prioritizes concierge-level travel experiences, offering VIP airport services, exclusive event access, and premium transportation options.
- **Event & Festival Leadership:** Major events like the Mother of the Nation Festival, Abu Dhabi Culinary Season, and high-profile concerts at Etihad Arena solidify Abu Dhabi's status as a global entertainment destination.
- **High-Net-Worth Tourism Strategy:** Abu Dhabi excels in attracting ultra-wealthy visitors through personalized itineraries, luxury real estate developments, and exclusive access experiences.
- **Comparison to Palm Beach County:** While Abu Dhabi thrives on high-energy tourism, global cultural investments, and immersive mega-events, Palm Beach County remains a refined, leisure-driven luxury destination catering to seasonal residents, business elites, and legacy wealth.

PRIMARY ASSETS

Abu Dhabi has strategically positioned itself as a global tourism powerhouse by developing a diverse array of attractions that cater to a wide spectrum of interests. The city dominates in sports tourism, hosting marquee events like the Formula 1 Abu Dhabi Grand Prix, UFC fights at Etihad Arena, and extreme motorsport competitions such as the Liwa Moreeb Dune Festival. It has also established itself as a conference and exhibition hub, with the Abu Dhabi National Exhibition Centre (ADNEC) hosting high-profile events such as the International Defense Exhibition & Conference (IDEX). In the entertainment sector, the Mother of the Nation Festival (MOTN) and Etihad Arena's global concerts and performances further solidify Abu Dhabi's reputation as a premier destination for cultural and live entertainment.

Beyond entertainment and sports, Abu Dhabi is investing heavily in world-class cultural and historical landmarks to differentiate itself from nearby Dubai. The Louvre Abu Dhabi, Sheikh Zayed Grand Mosque, and the newly established Abrahamic Family House highlight the emirate's focus on art, heritage, and interfaith dialogue. Additionally, natural attractions such as the Mangrove National Park and Saadiyat Island's pristine beaches balance its urban development with eco-tourism offerings. Looking ahead, the city continues to push the envelope with innovative projects like Surf Abu Dhabi, the upcoming Guggenheim and Zayed National Museum, and the highly anticipated Harry Potter theme park at Yas Island, positioning it as a dynamic mix of Las Vegas, Washington, D.C., Disney World, and Old-World Arabian luxury.

When compared to Palm Beach County, Abu Dhabi takes a bold, high-energy approach to tourism, while Palm Beach County remains a refined, leisure-focused destination catering to seasonal residents, luxury travelers, and business elites. Abu Dhabi thrives on adrenaline-fueled sports, global conventions, and high-profile entertainment, whereas Palm Beach County excels in golf, equestrian sports, exclusive social circles, and legacy-driven affluence. While both destinations attract high-net-worth visitors, Abu Dhabi appeals more to global thrill-seekers, art aficionados, and event-goers, while Palm Beach County remains the preferred choice for those seeking an elite, slower-paced luxury retreat with a focus on lifestyle and exclusivity.

UNIQUE ASSETS

Palm Beach County could enhance its tourism appeal by adopting several high-impact initiatives inspired by Abu Dhabi's successes. Eco-tourism expansion could be achieved by improving conservation efforts in the Loxahatchee River and Jupiter Inlet, creating guided kayak tours, floating boardwalks, and wildlife observation platforms similar to Abu Dhabi's Mangrove National Park. The County could also develop a signature cultural festival, modeled after Abu Dhabi's Mother of the Nation Festival, incorporating interactive art, live performances, and luxury food experiences to highlight its rich history and international influences. Additionally, Palm Beach could elevate its luxury wellness tourism by creating oceanfront retreats focused on yoga, hydrotherapy, and holistic treatments, akin to the Anantara Qasr Al Sarab Desert Resort in Abu Dhabi.

To strengthen its position in culinary and food tourism, Palm Beach County could expand its Food & Wine Festival into a multi-week, chef-driven culinary experience with exclusive tastings and farm-to-table showcases, similar to Abu Dhabi's Culinary Season. Lastly, interactive science and learning centers like the Cox Science Center and Museum could be enhanced to provide families with highly engaging, interactive and educational experiences. The planned expansion of the Center could help achieve this goal.

RESPONDING TO TRENDS

Wellness Tourism: Luxury resorts like Anantara Qasr Al Sarab offer personalized spa treatments and fitness programs in serene desert settings.

Immersive & Transformative Experiences: The "Alive in Al Ain" campaign provides interactive cultural experiences, showcasing Abu Dhabi's natural beauty and heritage.

Authenticity & Sustainability: The Integrated Transport Centre (ITC) enhances public transport, cycling infrastructure, and smart mobility to promote sustainable tourism.

Medical Tourism: Abu Dhabi is establishing itself as a medical tourism hub, leveraging cutting-edge healthcare facilities to attract international patients.

Outdoor Adventure & Glamping: Abu Dhabi offers luxury desert adventures, including glamping, dune bashing, and exclusive nature experiences.

Festivals & Premium Event Experiences: The emirate hosts world-class festivals and concerts, attracting international artists and luxury travelers year-round.

Inclusiveness & Multi-Generational Travel: Family-friendly attractions like Warner Bros. World and the Louvre Abu Dhabi make Abu Dhabi an ideal destination for travelers of all ages.

Social Media & Content Creation: Abu Dhabi drives digital tourism engagement through initiatives like the Abu Dhabi Culture platform and the Yas Island Metaverse, alongside strong social media campaigns.

Influencer Partnerships: Abu Dhabi collaborates with YKONE, TikTok, and global celebrities like Chris Hemsworth and Elsa Pataky to showcase its attractions through curated, high-impact influencer campaigns.

TOURISM STRATEGIES

Abu Dhabi has positioned itself as a global tourism leader by diversifying its attractions, enhancing infrastructure, and deploying strategic marketing initiatives. The emirate continues to invest in cultural and entertainment landmarks, such as the Louvre Abu Dhabi, the upcoming Guggenheim, Etihad Arena, and Sphere Abu Dhabi, alongside major sporting events like Formula 1, UFC, and extreme desert racing. These developments create a broad and high-impact tourism portfolio that appeals to luxury travelers, cultural enthusiasts, and adventure seekers. Additionally, Abu Dhabi's focus on sustainability and inclusivity, highlighted by projects like the Abrahamic Family House, reinforces its status as a forward-thinking global destination.

To complement its attractions, Abu Dhabi has made significant infrastructure and mobility enhancements, including airport expansions, improved public transport, and visa process streamlining. Its global marketing and sponsorship campaigns, such as its partnership with the New York Knicks and large-scale influencer collaborations, further strengthen its international visibility. The emirate is also doubling down on high-end hospitality, offering VIP experiences like luxury desert safaris, private museum tours, and exclusive Formula 1 access, reinforcing its appeal among high-net-worth individuals and elite travelers.

Palm Beach County could adopt several of these strategies to elevate its status as a luxury tourism destination. While already home to world-class golf, equestrian sports, and fine dining, the County could further develop immersive cultural and entertainment attractions, such as interactive art districts, high-profile performing arts festivals, and exclusive culinary experiences. Infrastructure improvements, including expanded water taxis, luxury airport transfers, and pedestrian-friendly developments, would enhance visitor mobility and make high-end tourism more accessible. Additionally, Palm Beach County could introduce a White Glove Concierge program, offering ultra-exclusive itineraries featuring private mansion stays, bespoke shopping excursions, luxury yacht charters, and VIP access to polo and golf events, mirroring Abu Dhabi's seamless, high-touch luxury tourism model.

By adopting these strategies, Palm Beach County could compete more effectively with global luxury destinations, appealing to the same ultra-affluent travelers who seek exclusivity, personalized service, and high-end cultural experiences. While Abu Dhabi thrives on large-scale development and high-energy tourism, Palm Beach County has the opportunity to leverage its legacy wealth, coastal lifestyle, and prestigious social scene to position itself as America's premier elite retreat—offering the same level of opulence, but with a more private and leisure-driven appeal.

HIGH VALUE VISITOR PREFERENCES: ABU DHABI VS. PALM BEACH COUNTY

From our Experian Mosaic analysis, Abu Dhabi outperforms Palm Beach County as a vacation destination for demographics seeking ultra-luxury experiences, world-class cultural attractions, and premium entertainment. It appeals most to Jet Set Urbanites, Couples with Clout, Platinum Prosperity, and Cosmopolitan Achievers, who prioritize high-end hospitality, international networking, and immersive cultural experiences like Formula 1, Louvre Abu Dhabi, and Michelin-starred dining.

On the other hand, Palm Beach County dominates as a long-term residence for nearly all segments. Its legacy wealth, tax advantages, luxury real estate, golf communities, healthcare, and philanthropic networks make it a superior choice for affluent families, retirees, and professionals seeking a stable, leisure-driven lifestyle. It especially attracts Golf Carts & Gourmets, Boomers & Boomerangs, Philanthropic Sophisticates, and Picture Perfect Families, who prioritize high-end suburban living, social exclusivity, and generational wealth preservation.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Abu Dhabi	PBC	Prefers to visit Abu Dhabi for its extravagant luxury and exclusive experiences but lives in PBC for its privacy, estates, and tax advantages.
	Platinum Prosperity	Abu Dhabi	PBC	Visits Abu Dhabi for high-end leisure and business networking but chooses PBC for its stable, affluent lifestyle and financial benefits.
	Kids and Cabernet	PBC	PBC	PBC wins for both visiting and living due to its suburban luxury, top-tier schools, and family-friendly lifestyle.
	Picture Perfect Families	PBC	PBC	PBC offers an ideal mix of safe, high-end suburban communities, strong schools, and a well-rounded family environment.
	Couples with Clout	Abu Dhabi	PBC	Abu Dhabi is appealing for its opulence and elite experiences, but PBC offers a more relaxed, community-driven luxury lifestyle.
	Jet Set Urbanites	Abu Dhabi	Abu Dhabi	Abu Dhabi is the choice for both visiting and living due to its ultra-modern, fast-paced luxury and global business appeal.
FLOURISHING FAMILIES	Across the Ages	Abu Dhabi	PBC	PBC is preferred for both visiting and living due to its strong multi-generational communities and high quality of life.
	Babies and Bliss	PBC	PBC	PBC provides an ideal environment for raising young children, with ample green spaces, quality education, and safety.
	Family Fun-Tastic	Abu Dhabi	PBC	Abu Dhabi is an exciting destination for travel, but PBC is preferred for its balanced, family-friendly suburban setting.
	Cosmopolitan Achievers	Abu Dhabi	PBC	Abu Dhabi offers prestige and international business connections for visiting, but PBC provides a diverse, dynamic, and livable urban environment.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Abu Dhabi	PBC	Abu Dhabi's modern, high-energy urban scene makes it appealing for travel, but PBC provides a refined and livable metropolitan experience.
	Golf Carts and Gourmets	PBC	PBC	PBC wins for its year-round golf, resort-like living, and premier culinary scene.
	Philanthropic Sophisticates	Abu Dhabi	PBC	Abu Dhabi offers global philanthropic events and networking, but PBC allows for deep community involvement and high-impact philanthropy.
	Boomers and Boomerangs	Abu Dhabi	PBC	PBC is the top living choice for its welcoming multi-generational neighborhoods, warm climate, and strong sense of community.
	PALM BEACH WINS (OUT OF 14)	4	13	ABU DHABI IS A LUXURY TRAVEL HOTSPOT FOR ELITE EXPERIENCES, BUT PBC WINS FOR LONG-TERM LIVING WITH ITS FINANCIAL BENEFITS AND ESTABLISHED SOCIAL CIRCLES.

BENCHMARKING LESSONS

Palm Beach County, while excelling as a premier residential destination, has the potential to elevate its luxury tourism appeal to better compete with Abu Dhabi's high-end, experience-driven model. To attract more ultra-wealthy visitors, the county should focus on curated exclusivity, cultural prestige, and seamless luxury hospitality. Establishing Palm Beach as a globally recognized luxury brand, similar to Abu Dhabi's elite positioning, could be achieved through initiatives like a "Palm Beach Privé" campaign, offering concierge-style itineraries with yacht charters, private beach clubs, and equestrian experiences. Expanding high-end cultural tourism through world-class arts festivals, elite culinary events, and private art auctions would further position Palm Beach as a sophisticated, must-visit destination for affluent travelers.

To enhance its premium event landscape, Palm Beach could introduce marquee international events, such as a "Polo & Prestige Week" or an expanded luxury yacht gala series, rivaling Abu Dhabi's Formula 1 and global summits. Additionally, strengthening concierge-style travel services, like a "Palm Beach JetSet" VIP concierge program, would provide seamless luxury experiences, ensuring high-spending visitors receive effortless, white-glove hospitality from arrival to departure. By investing in elevated branding, exclusive experiences, and curated luxury offerings, Palm Beach County can attract elite global travelers while maintaining its status as America's premier elite lifestyle destination.



MARBELLA

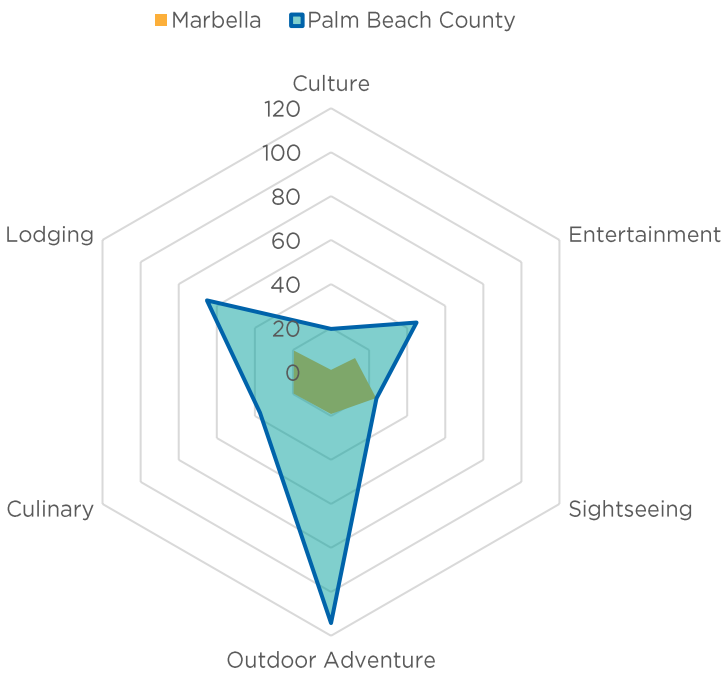
SPAIN



MARBELLA SPAIN

Marbella is a Mediterranean luxury playground blending sun-drenched beaches, elite golf courses, high-end shopping, Michelin-starred dining, and a glamorous nightlife scene, all set against a backdrop of Andalusian charm and modern opulence.

N/A	N/A	114.5 MILLION (COSTA DEL SOL)
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



WELLNESS TOURISM



MAJOR DESTINATION
FESTIVAL



LUXURY WATERFRONT
DESTINATION

MARBELLA SPAIN

OVERALL TAKEAWAYS

- **Luxury Destination Appeal:** Marbella is a premier high-end tourism destination, known for luxury resorts, Michelin-starred dining, and an elite social scene, attracting ultra-wealthy travelers seeking exclusivity.
- **Golf & Sports Tourism Hub:** With 70+ golf courses and international events like Ironman 70.3, Marbella has positioned itself as a year-round sports tourism destination, drawing high-end travelers.
- **Cultural & Historic Charm:** The city blends Andalusian heritage with modern luxury, featuring Casco Antiguo, Plaza de los Naranjos, and Puerto Banús marina, offering an authentic European experience.
- **High-End Entertainment & Festivals:** Marbella's Starlite Festival is a marquee luxury event, attracting international celebrities and reinforcing the city's status as an elite entertainment hub.
- **Wellness & Medical Tourism Growth:** The city is a leader in luxury wellness tourism, featuring spa retreats, medical clinics, and longevity-focused health services, appealing to health-conscious affluent travelers.
- **Sustainability & Smart Tourism:** Marbella is advancing eco-tourism, sustainability projects, and smart city initiatives, enhancing its appeal to responsible luxury travelers.
- **Expanding Global Appeal:** Marbella is actively targeting high-net-worth American tourists through direct flights, celebrity ambassadors, and international marketing efforts.
- **Elite Business & Conference Tourism:** The Congress and Exhibition Palace hosts major business events, though the city faces competition from Madrid and Barcelona in this sector.
- **How PBC Can Better Compete:** Enhance luxury appeal by creating a Starlite-style festival, expanding yachting and waterfront experiences, elevating Michelin-tier culinary events, strengthening sports tourism, and investing in wellness, medical tourism, and sustainable luxury initiatives to attract high-net-worth visitors.

PRIMARY ASSETS

Marbella, a premier destination on Spain's Costa del Sol, is renowned for its luxurious accommodations, world-class amenities, and Mediterranean charm. Visitors are drawn to its high-end resorts like the Marbella Club and Puente Romano, gourmet dining scene featuring Michelin-starred restaurants, and rich cultural heritage, including the picturesque Old Town and Plaza de los Naranjos. The city's year-round mild climate further enhances its appeal. However, overcrowding during peak seasons, high costs, and a perceived loss of traditional Spanish authenticity present challenges for some travelers. Additionally, the influx that visitors place on local infrastructure, are leading to congestion and stretched public services. Despite these drawbacks, Marbella remains a sought-after destination for those seeking a blend of luxury, culture, and natural beauty, though travelers should be mindful of its seasonal crowds and upscale pricing.

Marbella, a luxury tourism destination on Spain's Costa del Sol, has cultivated a high-end image through its world-class golf courses, upscale resorts, cultural heritage, and exclusive entertainment scene. Often called the "Costa del Golf," Marbella boasts over 70 golf courses, including Los Naranjos, Real Club Valderrama, and Finca Cortesin, which host prestigious international tournaments. The city has also positioned itself as a center for sports tourism, with endurance events like Ironman 70.3 growing in popularity. Marbella's business tourism sector revolves around the Congress and Exhibition Palace Adolfo Suárez, hosting major conferences, though it faces stiff competition from larger Spanish business hubs like Madrid and Barcelona. On the entertainment front, Marbella's Starlite Festival is a marquee event, attracting international celebrities for intimate, high-end concerts in a natural amphitheater, setting it apart from larger mainstream festivals.

Marbella's cultural and historic appeal is another key strength, with its Andalusian Old Town (Casco Antiguo), Plaza de los Naranjos, and Moorish-era Alcazaba ruins offering an authentic European experience that contrasts with the modern luxury of its Puerto Banús marina and high-end shopping districts. Marbella's Mediterranean coastline and proximity to the Sierra Blanca mountains provide a blend of beachfront relaxation and outdoor adventure, while sustainability efforts, such as the Finca Ana María eco-project, highlight the city's push toward responsible tourism. Unlike Palm Beach County, which leans heavily on Gilded Age history, business conventions, and structured luxury living, Marbella thrives on European cultural authenticity, glamorous leisure, and its reputation as a Mediterranean playground for the wealthy. For travelers seeking an elegant yet vibrant destination that fuses heritage, high-end amenities, and coastal beauty, Marbella continues to be one of Europe's premier luxury getaways.

UNIQUE ASSETS

Marbella has successfully developed a range of tourism assets and initiatives that could serve as inspiration for Palm Beach County. Its Starlite Festival, a high-profile music and cultural event, has positioned Marbella as a luxury entertainment hub, and a similar exclusive festival could elevate Palm Beach's arts and culture scene. Marbella's golf tourism thrives due to its favorable climate and high concentration of courses, a model Palm Beach could expand upon by enhancing its international golf marketing and hosting more elite tournaments. Additionally, Marbella's Old Town revitalization has preserved its Andalusian charm while boosting tourism, suggesting that Palm Beach could benefit from investing in the enhancement and promotion of its historic districts. The Puerto Banús marina, known for its luxury shopping, dining, and nightlife, highlights the potential for Palm Beach County to further develop its waterfront areas to cater to high-net-worth yacht owners and luxury travelers.

Beyond luxury, Marbella has expanded into health and wellness tourism, with bespoke spa retreats, medical tourism clinics, and large-scale wellness events such as the World Wellness Weekend, an approach Palm Beach County could adopt with its existing wellness infrastructure. Culinary tourism has also been a focus, with festivals like the Marbella Gastronomy Festival and Starlite's Gastro Experience attracting food lovers, providing a model for Palm Beach to enhance its own food and wine events. Marbella's eco-tourism initiatives, such as conservation efforts in the Artola Dunes, and its public art investments, including Salvador Dalí sculptures along Avenida del Mar, further illustrate how integrating sustainability and culture into urban planning can enhance a destination's appeal. Finally, Marbella's focus on sports tourism, with events like Ironman 70.3 and the Grand Prix Internacional de Gimnasia Rítmica, underscores how Palm Beach could benefit from hosting large-scale endurance and global sporting competitions to further diversify its visitor base.

RESPONDING TO TRENDS

Wellness Tourism: Marbella is a premier wellness destination, offering luxury spas, retreats, and health-focused events. The World Wellness Weekend 2024 featured 2,000 free activities, including yoga, fitness sessions, and craft markets, reinforcing its commitment to holistic well-being.

Sustainability & Eco-Tourism: Marbella is advancing eco-friendly tourism, with initiatives like LED lighting, improved recycling, and sustainable urban planning. The city aims to become a "green city of the future" by promoting responsible tourism and environmental conservation.

Technology & AI Integration: Marbella is evolving into a smart city, enhancing digital connectivity, AI-driven tourism services, and business innovation. These efforts improve efficiency, tourism experiences, and infrastructure, aligning with Spain's national digital transformation goals.

Premium Event Experiences: Marbella's Starlite Festival is one of Europe's top luxury music and cultural events, featuring stars like Will Smith and The Script. Its intimate, high-end setting reinforces Marbella's reputation as a global entertainment hub.

Culinary Tourism & Eateertainment: Marbella's dining scene blends local and international flavors. Events like the Starlite Festival's "Gastro Experience" and Marbella Gastronomy Festival showcase Michelin-starred chefs, wine tastings, and Andalusian cuisine in immersive settings.

Inclusiveness & Multi-Generational Travel: Marbella attracts travelers of all ages, offering a mix of family-friendly attractions, luxury experiences, and cultural events. The city prioritizes accessibility and intergenerational activities to ensure inclusivity.

Festivals & Cultural Events: Marbella's rich Andalusian heritage is celebrated through events like the Marbella International Film Festival and Semana Santa (Holy Week), offering visitors an authentic glimpse into Spanish traditions.

Outdoor Adventure & Photo Opportunities: Marbella's beaches and Sierra Blanca mountains offer hiking, sailing, and watersports, while its picturesque streets and luxury settings attract influencers and photographers.

Medical Tourism: Marbella is a high-end medical tourism hub, with specialized clinics in oncology, fertility, and trauma care. Its cutting-edge treatments and wellness-focused environment draw international patients.

‘Bleisure’ Travel: Marbella blends business and leisure travel, attracting professionals with luxury hotels, modern conference venues, and cultural experiences. The Congress and Exhibition Palace Adolfo Suárez enhances its appeal as a corporate destination.

TOURISM STRATEGIES

Marbella has been actively expanding its reach into the American travel market, leveraging direct flights between Málaga and New York and featuring celebrity ambassadors like Eva Longoria to enhance its visibility. The city has also increased participation in international tourism fairs and promotions, highlighting its appeal to high-net-worth American travelers. At the same time, Marbella is strengthening sports tourism by hosting Ironman events, golf tournaments, and water sports competitions, capitalizing on its favorable climate and year-round accessibility. This emphasis on active tourism not only broadens Marbella’s visitor base but also helps reduce seasonal dependence, attracting tourists outside of peak months.

To maintain its exclusivity and high-end tourism appeal, Marbella has shifted toward a luxury-first strategy, emphasizing premium hospitality, high-end shopping, and elite experiences. Investments in five-star hotels like the expanded Marbella Club Hotel and the addition of Finca Ana María’s eco-conscious luxury retreat reflect the city’s commitment to curating an upscale experience rather than pursuing mass tourism. This focus has paid off, with Marbella being voted “Best European Destination” in 2024, further solidifying its reputation. Additionally, technology is playing a role in enhancing visitor experiences, with iBeacon systems at tourist sites providing interactive, AI-driven engagement.

Improving connectivity and cultural offerings has also been a key priority for Marbella’s tourism strategy. New agreements with Iryo high-speed rail and Avanza bus services have significantly cut travel time from Madrid, making Marbella more accessible for both domestic and international visitors. The city is also expanding its entertainment and cultural landscape, with events like the Starlite Festival drawing international celebrities and visitors seeking exclusive, luxury-tier performances. Beyond entertainment, Marbella hosts a variety of cultural festivals, opera events, and film showcases, ensuring it remains not just a luxury destination, but also a cultural hub on the Mediterranean Riviera.

HIGH VALUE VISITOR PREFERENCES: MARBELLA VS. PALM BEACH COUNTY

Marbella and Palm Beach County both offer luxury tourism and high-end lifestyles, but they cater to different demographics when it comes to visiting versus long-term living. Marbella is the preferred destination for “American Royalty” (ultra-wealthy elites), “Platinum Prosperity” (high-net-worth professionals), and “Jet-Set Urbanites,” offering world-class golf, Puerto Banús’ luxury marina, Michelin-starred dining, and exclusive events like the Starlite Festival. Its European charm, vibrant nightlife, and cultural appeal make it an attractive short-term getaway for “Cosmopolitan Achievers” and “Sophisticated City Dwellers”, but its seasonal economy and limited family infrastructure make it less ideal for year-round residency.

Palm Beach County, however, is the stronger long-term choice for "Kids and Cabernet" (affluent families), "Boomers and Boomerangs" (retirees), and "Philanthropic Sophisticates" (wealthy individuals focused on giving back). With sprawling oceanfront estates, elite private schools, extensive golf and equestrian facilities, and a business-friendly environment, it provides a refined, stable luxury lifestyle that is better suited for raising families and long-term investment. While it lacks Marbella's Mediterranean atmosphere, it offers a more structured and exclusive residential experience, making Marbella the ultimate elite vacation spot, while Palm Beach remains the premier destination for luxury living.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Marbella	PBC	Prefers to visit Marbella for its European charm and luxury scene but lives in PBC for its estate properties, financial advantages, and elite social circles.
	Platinum Prosperity	Marbella	PBC	Visits Marbella for its high-end Mediterranean lifestyle but chooses PBC for long-term financial security and high-end living.
	Kids and Cabernet	PBC	PBC	PBC wins for both visiting and living due to its family-friendly upscale suburban environment and excellent schools.
	Picture Perfect Families	PBC	PBC	PBC provides the perfect mix of stability, luxury, and high-quality schools for affluent families.
	Couples with Clout	Marbella	PBC	Marbella is an appealing getaway for its refined leisure, but PBC offers a more balanced luxury lifestyle with strong social engagement.
	Jet Set Urbanites	Marbella	PBC	Marbella attracts this segment for short-term visits with its trendy, vibrant nightlife, but PBC offers a better long-term high-end urban lifestyle.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC is the preferred choice for visiting and living, with its multi-generational appeal, active communities, and strong local culture.
	Babies and Bliss	PBC	PBC	PBC provides young families with an ideal mix of safety, green spaces, top schools, and high-end suburban amenities.
	Family Fun-Tastic	PBC	PBC	PBC wins for its balance of recreational activities and family-oriented suburban living.
	Cosmopolitan Achievers	Marbella	PBC	Marbella is a sophisticated vacation destination, but PBC is the preferred place to live for its career opportunities and vibrant community.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Marbella	PBC	Marbella offers an old-world European luxury for travel, but PBC provides a more dynamic, well-connected metropolitan experience for living.
	Golf Carts and Gourmets	PBC	PBC	PBC wins for its year-round golf courses, culinary scene, and active social life tailored to high-net-worth retirees.
	Philanthropic Sophisticates	Marbella	PBC	Marbella offers elite global philanthropic events, but PBC provides deeper year-round involvement and giving opportunities.
	Boomers and Boomerangs	Marbella	PBC	PBC is the preferred choice for its warm climate, family-friendly communities, and strong intergenerational appeal.
	PALM BEACH WINS (OUT OF 14)	6	14	MARBELLA IS AN APPEALING EUROPEAN COASTAL RETREAT FOR TRAVEL, YET PBC IS FAVORED FOR ITS YEAR-ROUND LUXURY AND HIGH-END COMMUNITY AMENITIES.

BENCHMARKING LESSONS

To better compete with Marbella's appeal to ultra-wealthy visitors, Palm Beach County could enhance its exclusive experiences, luxury lifestyle offerings, and high-end entertainment. A Starlite-style luxury festival, featuring world-class performers, fine dining, and invite-only cultural events, could elevate Palm Beach's prestige. Expanding yachting tourism by transforming its marinas into elite lifestyle hubs with high-end shopping, dining, and entertainment—similar to Marbella's Puerto Banús—would further attract high-net-worth visitors. Additionally, Palm Beach could enhance its culinary scene with Michelin-tier food festivals, exclusive wine pairings, and interactive dining experiences, catering to "Cosmopolitan Achievers" and "Jet-Set Urbanites" looking for immersive gastronomy.

Palm Beach County could also position itself as a global sports tourism hub, building on its golf and equestrian strengths while introducing elite endurance events, triathlons, and luxury fitness retreats to attract high-spending active travelers. Expanding nightlife with ultra-exclusive beach clubs, rooftop lounges, and VIP social experiences would help the county compete with Marbella's high-energy luxury scene that appeals to affluent young professionals and couples. Additionally, developing world-class medical tourism and wellness retreats—integrating concierge healthcare, longevity treatments, and bespoke spa experiences—could position Palm Beach as a premier destination for high-net-worth individuals seeking elite wellness services.

Finally, Palm Beach could enrich its cultural identity by curating immersive heritage experiences, private museum events, and luxury historical tours, making its Gilded Age elegance as compelling as Marbella's European charm. With strategic investments in ultra-luxury events, wellness tourism, and high-end experiences, Palm Beach County could attract "American Royalty," "Platinum Prosperity," and high-income cultural travelers who currently favor Marbella, solidifying its reputation as an elite global destination for both visiting and living.



THE ALGARVE

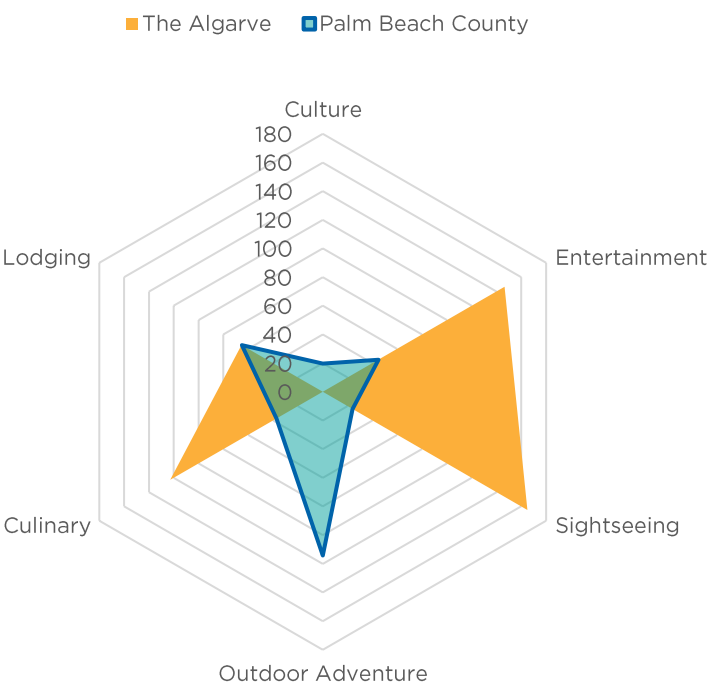
PORTUGAL



THE ALGARVE PORTUGAL

The Algarve is a strategically positioned coastal destination that blends world-class beaches, luxury leisure, and authentic cultural heritage with a growing emphasis on sustainable tourism, year-round event programming, and high-value experiential travel, making it an increasingly competitive player in the global tourism market.

\$5.7 MILLION	\$1 TO \$2 PER NIGHT <i>(FLAT FEE DEPENDENT ON SEASON)</i>	5.2 MILLION <i>(OVERNIGHT VISITORS)</i>
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



EVENT / FESTIVAL CAPITAL



TYING ECOTOURISM TO SUN & BEACH



PRESERVING CULTURAL & HISTORIC TOURISM ASSETS

THE ALGARVE PORTUGAL

OVERALL TAKEAWAYS

- ***Diversification Beyond Beach and Golf Tourism:*** Algarve is actively expanding cultural, eco, adventure, and food tourism to attract a broader visitor base. Palm Beach County could enhance its offerings beyond traditional luxury tourism by investing in immersive heritage experiences, outdoor recreation, and agritourism.
- ***Sustainability as a Core Tourism Strategy:*** Algarve is addressing over-tourism and environmental concerns by balancing coastal and inland tourism. Palm Beach County could similarly promote conservation-focused tourism, sustainable lodging, and eco-friendly visitor experiences to ensure long-term resilience.
- ***Year-Round Tourism and Event-Driven Growth:*** Algarve uses major international events (MotoGP, gastronomy festivals, and cultural celebrations) to drive visitation outside peak seasons. Palm Beach could expand its off-season programming with high-end food, arts, and music festivals to mitigate seasonal fluctuations.
- ***Leveraging Smart Tourism & AI Technology:*** Algarve is integrating AI-driven recommendations, real-time data tracking, and interactive digital experiences to enhance visitor engagement. Palm Beach County could implement AR-powered heritage tours, smart tourism kiosks, and AI-based trip planning tools.
- ***Wellness & High-End Experiential Travel Growth:*** Algarve has positioned itself as a hub for luxury wellness retreats, longevity-focused resorts, and premium spa experiences. Palm Beach County could expand its wellness offerings with medical tourism, longevity-focused health resorts, and elite fitness retreats.
- ***Emphasizing Authenticity & Local Culture:*** Algarve's success with local craft markets, historical reenactments, and culinary tourism demonstrates the appeal of authentic experiences. Palm Beach could develop immersive cultural tourism through artisanal markets, storytelling events, and high-end food festivals.
- ***Outdoor Adventure & Sustainable Luxury Experiences:*** Algarve has invested in cycling trails, hiking routes, glamping, and conservation tourism to attract active travelers. Palm Beach County could expand its outdoor offerings with eco-luxury resorts, guided nature experiences, and soft-adventure tourism.
- ***Targeting High-Value Visitor Segments:*** Certain affluent traveler segments currently favor Algarve due to its boutique luxury, affordable high-end experiences, and cultural depth. Palm Beach could curate exclusive experiences—such as yacht-based wellness retreats, private food and wine tours, and elite lifestyle festivals—to win over these visitors.

PRIMARY ASSETS

The Algarve, Portugal's southernmost region, is renowned for its dramatic coastline, year-round sunshine, and rich cultural heritage, making it a premier tourism destination. Its key strengths include pristine beaches, world-class golf courses, and a strong culinary identity featuring fresh seafood and regional wines. Historic towns like Tavira and Lagos add to its charm, while events such as the MED Festival and the Sardine Festival contribute to a diverse cultural appeal. However, the region faces challenges, including seasonal tourism fluctuations, overreliance on UK and German travelers, environmental concerns, and infrastructure strain during peak months.

To mitigate these challenges, Algarve is implementing sustainability initiatives, infrastructure improvements like the Algarve Metrobus, and efforts to diversify tourism beyond the traditional sun-and-sea model. It is also leveraging emerging trends, such as luxury wellness retreats, influencer marketing, and experiential tourism, to attract new visitor demographics. The region is positioning itself as a year-round destination through sports tourism (Portugal Masters, MotoGP), eco-tourism (Ria Formosa Natural Park), and high-end entertainment (Handsome Festival, FIESA Sand Sculpture Festival), all of which help broaden its appeal beyond summer vacationers.

Palm Beach County can draw inspiration from Algarve's event-driven approach to offset seasonality, emphasis on sustainable tourism, and smart destination initiatives leveraging technology and AI. Additionally, Palm Beach could expand its tourism portfolio by integrating more immersive cultural and adventure-based experiences, much like the Algarve's push into eco-tourism, food tourism, and wellness travel, ensuring long-term competitiveness in the global luxury market.

TRANSFERRABLE ASSETS

Palm Beach County can take inspiration from the Algarve's diverse tourism strategies to enhance its visitor experience and expand its appeal. Events like the Sardine Festival in Portimão showcase local culture through food and entertainment, a model Palm Beach could follow with seafood or agricultural festivals. Nature-based tourism initiatives, such as Ria Formosa Natural Park's guided tours, highlight biodiversity, mirroring opportunities for Palm Beach to emphasize eco-tourism in its wildlife reserves. The Algarve also leverages historical assets like Fortress of Sagres to attract cultural tourists, a strategy Palm Beach could adopt by promoting its historic landmarks with immersive storytelling and interactive experiences. Meanwhile, Algarve's Dom Pedro golf resorts drive year-round visitation through bundled stay-and-play packages, an approach Palm Beach could refine to further capitalize on its world-class golf courses.

Beyond traditional tourism, the Algarve has embraced innovative approaches, such as the International Sand Sculpture Festival (FIESA) and Loulé Criativo's artisan markets, which celebrate local craftsmanship—something Palm Beach could replicate to boost cultural tourism. Adventure-based attractions like Via Algarviana's long-distance hiking trails cater to active travelers, while wellness destinations such as Caldas de Monchique's thermal spas reinforce the growing trend of health tourism. Algarve's Handsome Festival and sustainability efforts, including water-saving awareness campaigns at Faro Airport, further demonstrate how destinations can engage travelers in meaningful, eco-conscious experiences. By adapting these proven strategies, Palm Beach County can expand its tourism portfolio, attract a wider range of visitors, and establish itself as a leader in sustainable and experiential travel.

RESPONDING TO TRENDS

Wellness Tourism: The Algarve has become a hub for wellness tourism, offering retreats that focus on health and longevity. For instance, the Longevity Health & Wellness Hotel provides bespoke wellness plans, advanced spa treatments, and holistic health workshops, catering to travelers seeking rejuvenation and relaxation.

Immersive and Transformative Experiences: Travelers are increasingly seeking immersive experiences that foster personal growth. The Algarve addresses this demand through initiatives like the Handsome Festival, which offers craft workshops, gastronomic experiences, and creative talks, allowing visitors to engage deeply with local culture.

Authenticity and Sustainability: The region emphasizes authentic cultural experiences and sustainable practices. Projects such as Loulé Criativo promote local crafts and traditions through workshops and markets, supporting cultural preservation and providing tourists with genuine interactions.

Culinary Tourism ("Eatertainment"): The Algarve's rich culinary heritage is showcased in events like the annual Sardine Festival in Portimão, where visitors can enjoy freshly grilled sardines accompanied by live music and cultural activities, blending dining with entertainment.

Premium Event Experiences: The region hosts high-quality events that attract international visitors. The International Sand Sculpture Festival (FIESA), for example, is the world's largest sand sculpture event, drawing artists and spectators from around the globe.

Outdoor Adventure and Glamping: The Algarve's natural landscapes offer ample opportunities for outdoor adventures. Trails like the Via Algarviana provide hiking paths through scenic areas, and the region is seeing growth in glamping sites that offer luxury camping experiences amidst nature.

TOURISM STRATEGIES

The Algarve has implemented a range of strategic initiatives to ensure sustainable tourism growth and diversification over the past five years, with a strong focus on balancing coastal and inland development. By promoting local communities, Portuguese traditions, and eco-conscious tourism, the region is reducing pressure on its most popular coastal areas while expanding inland attractions. Efforts to diversify tourism products beyond the traditional "sun and sea" model include cycling and walking tours, cultural heritage experiences, and gastronomy tourism. Additionally, Algarve is investing in year-round tourism promotion, leveraging international events such as MotoGP and gastronomy festivals to mitigate seasonality. Infrastructure upgrades, including the Algarve Metrobus, aim to enhance connectivity and accessibility, supporting long-term tourism expansion. These efforts align with Portugal's national tourism strategy, ensuring that the Algarve's economic, social, and environmental goals contribute to the country's broader development plan.

Looking ahead, Algarve is advancing smart tourism and digital integration to enhance visitor experiences, incorporating AI-driven recommendations, real-time data tracking, and smart signage. The region is also expanding its commitment to accessibility through the "Algarve for All" initiative, ensuring inclusive transportation and tourism services for individuals with disabilities. To further drive off-season visitation, Algarve is prioritizing international event attraction, positioning itself as a hub for sports, business conferences, and cultural festivals.

Additionally, eco-tourism development is a key priority, with investments in hiking and cycling routes, conservation projects, and sustainable lodging. Finally, the region is elevating its luxury tourism offerings, catering to high-net-worth travelers with exclusive accommodations, fine dining, and premium wellness experiences—a strategic move to enhance visitor spending and long-term competitiveness in the global tourism market.

Palm Beach County can take inspiration from Algarve’s balanced tourism development and diversification strategies to strengthen its own visitor economy. By promoting eco-conscious tourism and cultural heritage experiences, the county can reduce over-reliance on its beaches while expanding inland attractions such as nature reserves, agritourism, and historical sites. Investing in year-round tourism programming, including high-profile international events, culinary festivals, and niche sports competitions, would help mitigate seasonal fluctuations and attract a broader visitor base. Additionally, improving infrastructure and connectivity, such as enhanced public transportation, pedestrian-friendly areas, and alternative transit options, could make Palm Beach County more accessible for both residents and visitors. Looking ahead, smart tourism initiatives—including AI-driven visitor experiences, real-time data tracking, and interactive digital wayfinding—could elevate the destination’s appeal and efficiency. Strengthening accessibility efforts, such as adaptive beach access and inclusive hospitality services, would further position Palm Beach as a leader in welcoming all travelers. Finally, investing in sustainable luxury tourism, including boutique wellness retreats, high-end adventure experiences, and exclusive culinary offerings, would cater to high-net-worth visitors while reinforcing Palm Beach’s reputation as a world-class destination.

HIGH VALUE VISITOR PREFERENCES: ALGARVE VS. PALM BEACH COUNTY

The comparative analysis between Algarve and Palm Beach County highlights how Algarve excels as a vacation destination for specific traveler segments, while Palm Beach County appeals to a broader range of visitors and remains the stronger choice for long-term living. Algarve is particularly attractive to Cosmopolitan Achievers and High-Income Cultural Travelers, who are drawn to its historic towns, fado music, and authentic European charm. Couples with Clout and Jet Set Urbanites favor Algarve’s romantic coastal retreats, Michelin-starred dining, and lively nightlife hubs like Albufeira and Vilamoura, which offer a vibrant yet affordable luxury experience. Philanthropic Sophisticates are also increasingly choosing Algarve for its eco-tourism initiatives, sustainable resorts, and conservation-focused travel opportunities. However, Algarve struggles to appeal to families and multi-generational travelers, as it lacks large-scale attractions, family-oriented infrastructure, and year-round accessibility.

Palm Beach County, in contrast, is the preferred vacation destination for affluent suburban families (Kids and Cabernet, Picture Perfect Families), multi-generational travelers (Across the Ages), and young families (Babies and Bliss) due to its wide range of family-friendly attractions, top-tier beaches, and interactive experiences like zoos, museums, and water parks. Golf Carts and Gourmets also overwhelmingly choose Palm Beach for its world-class golf courses, luxury dining, and exclusive country clubs, while American Royalty and Platinum Prosperity travelers favor its high-end private clubs, yachting culture, and elite social scene. Even for Sophisticated City Dwellers, Palm Beach County provides a more walkable urban luxury experience in areas like West Palm Beach and Boca Raton, offering convenience and access to entertainment, dining, and shopping year-round.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC due to its exclusivity, wealth-friendly environment, and established luxury infrastructure.
	Platinum Prosperity	Algarve	PBC	Visits The Algarve for its European coastal charm but lives in PBC for its financial advantages and high-end lifestyle.
	Kids and Cabernet	PBC	PBC	Chooses PBC for both visiting and living due to its family-oriented upscale suburban environment and excellent schools.
	Picture Perfect Families	PBC	PBC	PBC offers the perfect mix of affluence, safety, and family-friendly communities, making it the top choice for both visiting and living.
	Couples with Clout	Algarve	PBC	Enjoys The Algarve's scenic luxury for travel but prefers PBC's refined, comfortable, and tax-efficient lifestyle.
	Jet Set Urbanites	Algarve	PBC	Visits The Algarve for its trendy, international appeal but prefers PBC as a more stable and connected place to live.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC wins for both visiting and living, offering multi-generational appeal, strong community ties, and cultural vibrancy.
	Babies and Bliss	PBC	PBC	PBC is the preferred choice for young families due to its excellent schools, safe communities, and high-end suburban living.
	Family Fun-Tastic	Algarve	PBC	The Algarve provides an appealing travel destination for families, but PBC is ideal for long-term living due to its recreational amenities and high quality of life.
	Cosmopolitan Achievers	Algarve	PBC	The Algarve is an attractive travel destination with a relaxed European lifestyle, but PBC is the better place to live for career growth and a thriving social scene.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Algarve	PBC	The Algarve offers an appealing European urban experience for travel, but PBC provides a more dynamic and livable metropolitan environment.
	Golf Carts and Gourmets	PBC	PBC	PBC wins for both visiting and living, with its world-class golf courses, high-end dining, and strong luxury leisure community.
	Philanthropic Sophisticates	Algarve	PBC	The Algarve offers unique international philanthropic opportunities, but PBC allows for deeper year-round engagement and charitable impact.
	Boomers and Boomerangs	Algarve	PBC	The Algarve is an attractive destination for a getaway, but PBC is the preferred home base due to its warm climate, multi-generational appeal, and strong community.
	PALM BEACH WINS (OUT OF 14)	6	14	THE ALGARVE IS A SCENIC, RELAXED EUROPEAN GETAWAY, THOUGH PBC OFFERS A MORE PRESTIGIOUS, YEAR-ROUND LUXURY LIFESTYLE.

BENCHMARKING LESSONS

Palm Beach County can expand its visitor appeal by enhancing cultural, luxury, and adventure-driven experiences to attract high-net-worth travelers who currently favor the Algarve. Developing immersive cultural and heritage tourism, such as international upscale culinary festivals, immersive art exhibitions, and AR-powered historical tours, would appeal to Cosmopolitan Achievers and High-Income Cultural Travelers seeking authentic, high-end cultural experiences. Strengthening romantic and boutique travel offerings through luxury coastal retreats, exclusive fine dining, and private yacht excursions could make Palm Beach more enticing for Couples with Clout and Affluent DINKs looking for intimate, sophisticated getaways. Additionally, expanding outdoor and adventure tourism, including coastal hiking trails, high-end glamping, and private eco-adventures, would position Palm Beach as an attractive alternative for Jet Set Urbanites and active luxury travelers who crave premium outdoor experiences.

Further positioning Palm Beach County as a sustainable luxury destination could win over Philanthropic Sophisticates and Conscious Luxury Travelers, with initiatives such as high-profile conservation tourism, eco-certified golf courses, and voluntourism programs tied to marine restoration. Elevating gastronomic and wine tourism by curating Michelin-tier fine dining events and private chef-led culinary tours could establish Palm Beach as a premier destination for Culinary Travelers and Affluent Food Enthusiasts. Hosting internationally renowned luxury events, such as a one-of-a-kind music festival, exclusive golf pro-ams, or global art and culture summits, would further boost the county's prestige among affluent cultural and sports tourism markets.



GOLD COAST

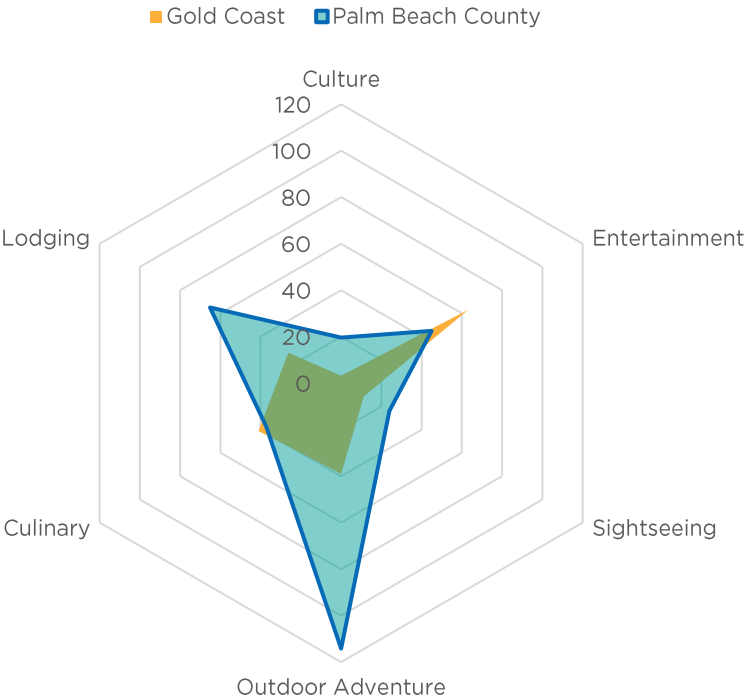
AUSTRALIA



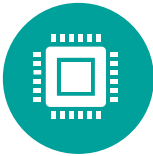
GOLD COAST AUSTRALIA

The Gold Coast is a high-energy coastal metropolis that blends world-class surf beaches, adventure tourism, luxury resorts, vibrant nightlife, and a thriving events scene with a growing focus on sustainability and immersive nature-based experiences.

\$73.3 MILLION (2024)	10.00%	12,300,000 (2023)
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



ECO & ADVENTURE
TOURISM



AI AND SMART CITY
PIONEERING



SHORT-TERM THRILL-
SEEKING DESTINATION

GOLD COAST AUSTRALIA

OVERALL TAKEAWAYS

- ***An Adventure and Experience-Driven Destination:*** Unlike purely luxury destinations, the Gold Coast thrives on theme parks, water-based attractions, outdoor adventures, and immersive tourism experiences, making it a magnet for active travelers and families.
- ***Major Events are a Pillar:*** The city heavily invests in large-scale events like the Gold Coast Marathon, Pacific Airshow, and Gold Coast 500, driving international visitors and media attention.
- ***Luxury Tourism and Integrated Resort Development:*** New developments like The Star Gold Coast's \$2.3 billion expansion and luxury high-rises are elevating the city's appeal to affluent travelers and positioning it as a premium tourism hub.
- ***Nature-Based & Sustainable Tourism a Growing Priority:*** The Wonder Reef dive attraction, eco-lodges in the Hinterland, and conservation-focused tourism projects show a strong push toward sustainability and environmentally conscious experiences.
- ***Cultural and Arts Investment:*** The HOTA Gallery (\$60.5M), planned lyric theatre, and new cultural events are expanding the Gold Coast's appeal beyond just beaches and nightlife, attracting cultural travelers.
- ***Infrastructure & Accessibility Investments:*** The expansion of the Light Rail, Oceanway pedestrian network, and international airport upgrades are making it easier for tourists to navigate and stay longer.
- ***Adapting to Global Trends in Wellness & Experiential Travel:*** New wellness retreats, bathhouses, and luxury experiential stays (such as eco-resorts and nature retreats) are helping the city appeal to transformative and wellness-focused travelers.
- ***An Example for Palm Beach County:*** To better compete for high-energy visitors, Palm Beach County could invest in adventure parks, blockbuster events, experiential nightlife districts, and structured eco-tourism experiences to complement its existing strengths in luxury and residential appeal.

PRIMARY ASSETS

The Gold Coast is a well-established tourism destination with a diverse range of assets that support a strong visitor economy. Its coastal and hinterland landscapes provide a mix of urban beach experiences and nature-based tourism, catering to both leisure and adventure travelers. The region benefits from an extensive accommodation network, international airport connectivity, and a growing public transport system, including the G:link light rail.

The tourism sector is driven by its theme parks, outdoor recreation, and events industry, but faces challenges related to overdevelopment, environmental sustainability, competition from other global destinations, and economic reliance on tourism. Addressing these challenges requires continued investment in diversification, infrastructure, and experience development to remain competitive.

Strategic investments have focused on broadening the tourism offering beyond traditional beach and theme park experiences. Sports tourism has become a key economic driver, with events like the Gold Coast Marathon and Sanctuary Cove International Boat Show drawing national and international participants. Business events have also been a priority, with the Gold Coast Convention and Exhibition Centre (GCCEC) playing a role in positioning the city as a conference and exhibition destination. In addition, cultural and entertainment offerings such as the HOTA Gallery, Blues on Broadbeach, and Swell Sculpture Festival contribute to the diversification of the visitor economy by attracting different market segments. These efforts align with a broader strategy to enhance year-round visitation and reduce seasonal dependency.

Future developments aim to strengthen tourism infrastructure and create new visitor experiences. Projects such as the Broadwater Glamping and Cableway Project focus on sustainable tourism, while attractions like the \$50 million Wizard of Oz precinct at Warner Bros. Movie World and the \$300 million Palm Valley Gold Coast Resort support family and adventure tourism. These investments align with the city's ongoing efforts to expand its tourism appeal, enhance economic resilience, and position itself as a well-rounded visitor destination. Ensuring that these developments complement the region's natural and urban assets will be key to maintaining long-term sustainability and competitiveness in the global travel market.

UNIQUE ASSETS

Palm Beach County can draw strategic insights from the Gold Coast's approach to tourism development, particularly in areas that support sustainability, digital transformation, and nature-based experiences. The Gold Coast has successfully implemented sustainable tourism programs that assist businesses in reducing their environmental footprint, a model that Palm Beach could replicate to support eco-friendly travel. Nature-based tourism is another key area of opportunity, as Palm Beach County's natural assets—rivers, wetlands, and coastal ecosystems—could be better leveraged through eco-tours, wildlife sanctuaries, and educational trails. Expanding major sporting events, such as marathons or endurance races, could also attract international participants and spectators, mirroring the success of the Gold Coast Marathon.

To enhance its tourism offerings, Palm Beach County could also focus on cultural and entertainment-driven tourism. The Gold Coast has invested in large-scale cultural festivals, such as the Swell Sculpture Festival, which Palm Beach could emulate to highlight local artists and foster engagement. The Gold Coast's investment in integrated resort developments, featuring luxury accommodations with recreational amenities like surf parks presents a model for Palm Beach to consider in catering to high-end travelers. Further opportunities include the development of aquatic and community centers, public art installations, and adventure tourism attractions, such as zip-lining or interactive water parks, which could enhance visitor engagement and position Palm Beach County as a more dynamic destination.

RESPONDING TO TRENDS

Wellness Tourism: The Gold Coast has expanded its wellness offerings, particularly in the Hinterland and southern regions. Notable establishments include Ground Bathhouse (Currumbin Valley), Soak Bathhouse (Mermaid Beach), and Native State (Kirra), offering hydrotherapy, saunas, and guided meditation. Upcoming attractions like SOL Elements in Tamborine Mountain and Greenhouse the Bathhouse in Tallebudgera Valley further enhance the region's wellness tourism landscape. High-end retreats such as Gwinganna and Eden Health Retreat provide immersive wellness programs integrating gourmet meals, meditation, and nature-based therapies.

Immersive & Transformative Experiences: Luxury wellness retreats like Gwinganna and Eden Health Retreat offer guided bush walks, sound healing, and yoga classes, allowing visitors to engage deeply with nature. These experiences support transformative tourism, where visitors seek personal growth and well-being through immersive, outdoor-focused activities.

Authenticity & Cultural Engagement: The Gold Coast promotes cultural tourism through initiatives like the Jellurgal Aboriginal Cultural Centre, where First Nations guides lead tours that explore Indigenous history, traditions, and connection to the land. These experiences provide visitors with authentic cultural engagement and insight into Australia's heritage.

AI and Digital Integration: The Gold Coast is integrating AI and smart technology to enhance its tourism sector and urban management. Experience Gold Coast (EGC) partnered with Sitecore to develop an AI-driven digital experience platform, which analyzes visitor data to personalize content and offers, resulting in a 48.5% increase in website traffic and a 52.5% rise in new visits. The city's Digital City Program utilizes real-time data analytics to monitor tourism trends and optimize resource management. Additionally, smart transport initiatives—such as Queensland's first smart ticketing system for public transit—improve accessibility for visitors. These advancements reflect the Gold Coast's commitment to leveraging AI for enhanced visitor experiences, seamless mobility, and data-driven decision-making in tourism and urban planning.

Sustainability & Nature-Based Tourism: In 2024, the City of Gold Coast launched a Nature-Based Tourism Program, encouraging private investment in eco-accommodation, low-impact tourism, and outdoor adventure infrastructure. Projects like the Eaglemont Estate acquisition near Springbrook National Park support sustainable tourism by offering new opportunities for eco-friendly stays, zip-lining, and guided nature experiences.

Premium Event Experiences: The Gold Coast is a key event tourism destination, hosting large-scale events such as the Gold Coast Marathon, music festivals, and business conferences at the Gold Coast Convention and Exhibition Centre (GCCEC). These events attract domestic and international attendees and contribute to the city's tourism economy year-round.

Medical Tourism: With a strong healthcare infrastructure and high-end wellness retreats, the Gold Coast is positioning itself as a potential medical tourism hub, catering to visitors seeking specialized treatments and holistic wellness services.

Youth Sports & Outdoor Adventure: The region's beaches, parks, and recreational centers support a thriving youth sports scene, with facilities for surfing, soccer, rugby, and adventure sports. Training camps and tournaments attract young athletes and sports tourism to the area.

Glamping & Unique Accommodations: The Gold Coast is investing in luxury nature-based stays, such as glamping sites and eco-resorts in the Hinterland. The city is developing projects like the Broadwater Glamping and Cableway Project, which will offer luxury camping, adventure experiences, and educational eco-tourism.

Inclusiveness & Multigenerational Travel: The Gold Coast caters to travelers of all ages, from family-friendly theme parks to luxury wellness retreats. Its diverse range of attractions makes it an appealing destination for multigenerational families seeking both adventure and relaxation.

Festivals & Cultural Events: The region hosts major cultural events, including the Gold Coast Film Festival, Blues on Broadbeach, and the internationally acclaimed HOTA Gallery exhibitions. These festivals and initiatives strengthen the city's reputation as a vibrant arts and entertainment hub.

TOURISM STRATEGIES

The Gold Coast has taken a strategic approach to tourism development, emphasizing destination management, major events, eco-tourism, infrastructure, and cultural investment. The Destination Tourism Management Plan (DTMP) guides marketing, stakeholder collaboration, and investment priorities. Event-driven tourism is a major focus, with the Pacific Airshow and Gold Coast 500 drawing international visitors, while a planned indoor entertainment arena aims to expand large-scale events. Nature-based and sustainable tourism initiatives, such as the Eaglemont Estate project with eco-lodging, zip-lining, and educational centers, further diversify visitor experiences.

Infrastructure improvements enhance accessibility, including the Oceanway coastal pathway and a 69-hectare park in Mudgeeraba. Cultural investments, such as the \$60.5 million HOTA Gallery and a planned 1,800-seat lyric theatre, strengthen the arts scene. Progress continues on key DTMP projects, including Commonwealth Games infrastructure, the Wonder Reef dive attraction, and Gold Coast Light Rail expansion. Seasonal demand strategies like the "Sneaky Mid-Weekly" campaign, which increased mid-week hotel occupancy by 10.7%, and "Stay & Play" promotions, converting event/festival-related day-trippers into overnight visitors, offer models Palm Beach County could adapt to drive year-round tourism.

Palm Beach County could also expand major events, using Gold Coast's success with the Commonwealth Games and Pacific Airshow as inspiration for a waterfront airshow or international surf festival. Eco-tourism initiatives, including adventure trails, artificial reefs, and conservation-based experiences, could leverage the county's natural assets. Infrastructure enhancements, such as transit improvements, pedestrian-friendly districts, and luxury hotel developments, would strengthen accessibility. Additionally, wellness and immersive tourism, including resort-style wellness retreats, interactive history tours, and experiential dining, could attract new visitors. Expanding business and conference tourism through upgraded venues and technology-driven meeting spaces would further diversify the tourism economy. By adapting these strategies, Palm Beach County can position itself for long-term growth while maintaining its unique identity.

HIGH VALUE VISITOR PREFERENCES: GOLD COAST VS. PALM BEACH COUNTY

The Gold Coast and Palm Beach County both offer high-end coastal lifestyles, but they cater to different visitor and resident demographics. The Gold Coast excels as a short-term leisure destination, attracting affluent young professionals, thrill-seeking families, and adventure travelers with its theme parks, luxury resorts, high-energy nightlife, and outdoor excursions. It's a hub for adventure tourism, casino resorts, and immersive experiences, making it the preferred destination for vacationers looking for entertainment and excitement. On the other hand, Palm Beach County is better suited for long-term living, offering stability, exclusivity, and financial advantages that appeal to ultra-wealthy elites, retirees, and affluent families.

With sprawling oceanfront estates, top-rated private schools, elite golf courses, and a strong philanthropic scene, Palm Beach County provides a more sustainable, private, and secure environment for high-net-worth individuals and families.

While Gold Coast wins as a high-energy visitor destination, Palm Beach County is the preferred place to live for those seeking a quieter, more luxurious, and generationally wealthy lifestyle. Gold Coast's rapid development and entertainment focus make it an ideal playground for short-term travelers, but Palm Beach's tax advantages, gated communities, and country club culture make it the better choice for long-term wealth preservation and lifestyle stability. Ultimately, both destinations thrive in their own ways—Gold Coast as a tourism and entertainment capital, and Palm Beach County as a premier place for luxury living and financial security.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers PBC for both visiting and living due to its exclusive estates, elite social scene, and wealth-friendly policies.
	Platinum Prosperity	Gold Coast	PBC	Visits Gold Coast for its vibrant luxury tourism but prefers PBC for its stable, high-net-worth lifestyle.
	Kids and Cabernet	Gold Coast	PBC	Gold Coast offers family-friendly coastal attractions for visits, but PBC is ideal for long-term family living with top-tier schools and suburban luxury.
	Picture Perfect Families	Gold Coast	PBC	Gold Coast is an appealing vacation destination, but PBC offers the best mix of affluence, safety, and suburban comfort.
	Couples with Clout	Gold Coast	PBC	Gold Coast attracts high-end travelers, but PBC provides a more refined, relaxed, and tax-friendly lifestyle.
	Jet Set Urbanites	Gold Coast	PBC	Gold Coast is an exciting destination for travel, but PBC is the preferred place to live due to its urban affluence and exclusivity.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC wins for both visiting and living, offering a strong multi-generational appeal, vibrant communities, and high-quality amenities.
	Babies and Bliss	Gold Coast	PBC	Gold Coast is fun for family vacations, but PBC is the preferred place to raise young children due to its suburban charm and family-friendly environment.
	Family Fun-Tastic	PBC	PBC	PBC takes the lead for both visiting and living, providing family-oriented recreational opportunities and excellent suburban communities.
	Cosmopolitan Achievers	PBC	PBC	PBC is the clear winner for both visiting and living, offering a strong mix of career opportunities, cultural experiences, and high-end living.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	PBC	PBC	PBC wins for both visiting and living, providing an elegant, well-rounded metropolitan experience with a relaxed coastal vibe.
	Golf Carts and Gourmets	PBC	PBC	PBC is the ultimate destination for retirees and leisure seekers with its exclusive golf courses and gourmet dining.
	Philanthropic Sophisticates	PBC	PBC	PBC offers the best environment for year-round philanthropic engagement and elite networking.
	Boomers and Boomerangs	PBC	PBC	PBC remains the top choice for both visiting and living due to its warm climate, multi-generational appeal, and strong community ties.
	PALM BEACH WINS (OUT OF 14)	8	14	THE GOLD COAST IS A VIBRANT, HIGH-ENERGY TRAVEL DESTINATION, BUT PBC IS PREFERRED FOR AFFLUENT, STABLE, AND FAMILY-FRIENDLY LIVING.

BENCHMARKING LESSONS

Palm Beach County has the opportunity to expand its short-term tourism appeal by attracting demographics that currently favor the Gold Coast, such as young professionals, adventure travelers, theme park-seeking families, and nightlife enthusiasts. One of the most impactful initiatives would be the development of a signature adventure and water park experience, positioning Palm Beach as a destination for high-energy, multi-generational entertainment. By leveraging its water-based recreation strengths, the county could introduce an innovative surf park, deep-sea diving simulators, and artificial reef experiences, potentially partnering with global entertainment brands like Universal or Disney to create immersive attractions. Additionally, expanding festival and event tourism could generate significant visitor demand, with potential for a world-class surf festival, a Palm Beach Air & Water Show, or an extreme sports series. Enhancing marketing efforts for existing events like SunFest would also help increase international appeal and drive higher visitor spending.

Beyond adventure and events, Palm Beach County could enhance nightlife, outdoor tourism, and hospitality offerings to appeal to younger and experience-driven travelers. Establishing a high-end waterfront entertainment district with rooftop lounges, live music venues, and immersive nightlife experiences would help consolidate and elevate the county's entertainment scene. In parallel, adventure and eco-tourism could be strengthened through zip-lining parks, luxury glamping sites, and structured outdoor excursions in natural areas like Jupiter or Loxahatchee. The county could also modernize its hospitality sector by introducing experiential boutique hotels, co-living spaces for digital nomads, and urban resorts in areas like West Palm Beach and Delray Beach.



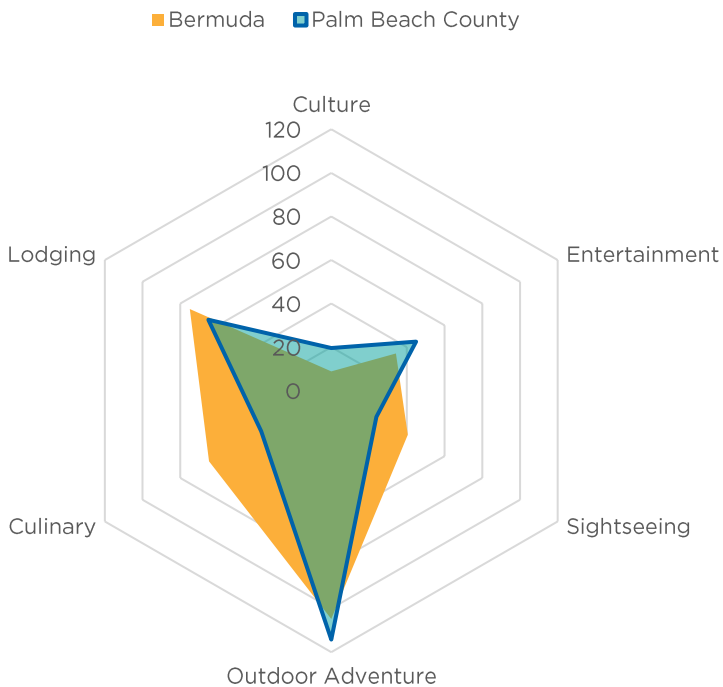
BERMUDA



BERMUDA

Bermuda is an exclusive, high-end island destination that blends British-Caribbean charm, world-class sailing, luxury resorts, and pristine pink sand beaches with a strong focus on sustainability, immersive cultural experiences, and premium outdoor adventures.

\$35.9 MILLION	10.00%	550,000 (2023)
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



DIVERSIFYING FROM BEACHES



WATER ADVENTURES



YACHT CULTURE

BERMUDA

OVERALL TAKEAWAYS

- ***Bermuda’s Strength in Luxury & Exclusivity:*** Bermuda excels as a high-end island destination, offering pink sand beaches, superyacht tourism, and premium cultural experiences, making it highly attractive to ultra-high-net-worth travelers, luxury couples, and cultural tourists seeking exclusivity and privacy.
- ***Challenges & Competition:*** Despite its luxury appeal, Bermuda faces seasonal tourism struggles, high costs, and limited airlift, creating vulnerabilities that Palm Beach County does not have. The island also competes with other Caribbean destinations that offer similar high-end experiences at more competitive price points.
- ***Year-Round Tourism Development:*** Bermuda is working to reduce seasonality by diversifying its event offerings, leveraging sports and MICE tourism, and promoting superyacht visits during winter months. Palm Beach County could adopt a similar strategy to attract Bermuda’s high-end visitors outside of peak travel seasons.
- ***Winning Over Bermuda’s Luxury Traveler Segments:*** Bermuda appeals to elite travelers, cultural tourists, and adventure seekers, but Palm Beach County can compete by developing superyacht tourism infrastructure, creating high-end investment networking events, and enhancing its culinary, mixology, and fashion tourism sectors.
- ***Expanding Marine & Adventure Tourism:*** Bermuda is known for shipwreck diving, sailing regattas, and marine tourism, experiences that Palm Beach County could replicate through high-end yacht excursions, VIP reef diving, and private eco-tourism packages.
- ***Differentiation & Destination Branding:*** While Bermuda is rebranding beyond its traditional “beach destination” image, Palm Beach County could refine its marketing strategy to emphasize cultural depth, luxury adventure, and year-round appeal to compete for high-value visitors who currently choose Bermuda.

PRIMARY ASSETS

Bermuda is a premier island destination known for its striking pink sand beaches, rich cultural heritage, and world-class maritime attractions. Its proximity to the U.S. East Coast makes it an accessible getaway for luxury travelers, while its blend of British and Caribbean influences offers a unique and immersive cultural experience. With high-end accommodations and a strong superyacht segment, Bermuda thrives on exclusivity and premium leisure experiences, attracting affluent visitors seeking relaxation and adventure.

Despite its appeal, Bermuda faces several challenges, including a highly seasonal tourism industry, high costs for both visitors and residents, and limited airlift from key markets. The island also competes with emerging Caribbean luxury destinations that offer similar attractions at more competitive price points. Additionally, environmental vulnerabilities such as hurricanes and climate change pose long-term risks to its tourism sector. However, Bermuda is actively addressing these issues through strategic investments in infrastructure, sustainability initiatives, and expanded event-driven tourism.

To boost year-round visitation, Bermuda is diversifying its tourism products with sports and cultural events, such as the Bermuda Triangle Challenge and Black Golfers Week. The Bermuda Tourism Authority (BTA) is also launching innovative marketing campaigns like "Lost Yet Found" to reshape its brand identity and appeal to a broader audience. Investments in medical tourism and digital engagement, including AI-driven visitor personalization and virtual tours, further position Bermuda as a forward-thinking, high-value destination. By balancing its traditional luxury appeal with modern innovations, Bermuda aims to ensure long-term sustainability and competitiveness in the global travel market.

TRANSFERRABLE ASSETS

Bermuda has strategically positioned itself as a high-end tourism destination by leveraging superyacht tourism, cultural heritage, and sports events to attract affluent visitors. Through its "Go Where the Yachts Go" campaign, Bermuda partnered with Fort Lauderdale to highlight its luxury maritime services, a model that Palm Beach County could adopt to enhance its own yachting industry. The island also promotes heritage trails that showcase its rich history, an initiative that Palm Beach could replicate by developing themed trails, such as a Black Heritage Trail, to appeal to culturally engaged travelers.

RESPONDING TO TRENDS

Wellness Tourism: Recognizing the growing demand for health-focused travel, Bermuda offers a range of wellness experiences. Visitors can engage in activities such as yoga retreats, spa treatments, and nature-based therapies, all set against the island's serene landscapes. This approach caters to travelers seeking physical and mental rejuvenation.

Immersive and Transformative Experiences: Bermuda provides opportunities for travelers to deeply engage with its culture and environment. Activities like exploring the Crystal Caves, participating in local festivals, and engaging with the island's art and music scenes offer visitors authentic and transformative experiences.

Sustainability Initiatives: With a long-standing commitment to environmental conservation, Bermuda has implemented eco-friendly practices across its tourism sector. Efforts include the promotion of electric microcars for transportation, support for eco-friendly businesses, and initiatives to protect marine ecosystems. These measures appeal to eco-conscious travelers and ensure the preservation of the island's natural beauty.

TOURISM STRATEGIES

Bermuda's 2019-2026 Tourism Strategy focuses on making the island a year-round destination by reducing seasonality through strategic cruise partnerships, diverse event programming, and superyacht tourism in the winter months. The island is also embracing technology and visitor personalization, using AI-driven insights to curate tailored experiences and launching a centralized event and booking portal for seamless trip planning. Additionally, Bermuda is investing in local workforce development, not only by promoting tourism careers but also by aligning service standards across industries and fostering entrepreneurship through tourism incubators. Sports and group tourism are also a priority, with Bermuda expanding its offerings to include yachting, golf, rugby, and esports, alongside efforts to grow MICE (Meetings, Incentives, Conferences, and Exhibitions) tourism, which is expected to increase hotel occupancy in the off-season. The island is also doubling down on sustainability, integrating eco-friendly lodging, electric vehicles, and marine conservation tourism into its long-term vision.

Beyond these initiatives, Bermuda is also modernizing its infrastructure to improve airport and cruise terminal experiences, streamline transportation, and enhance accessibility for all visitors. Recognizing the need to differentiate itself in a competitive market, Bermuda is refining its branding strategy to move beyond its reputation as just a beach destination and instead highlight its unique "way of life." Targeted marketing efforts focus on attracting African American travelers, luxury jetsetters, and adventure seekers, ensuring Bermuda appeals to a broader and more diverse audience. These strategies position Bermuda as a forward-thinking, high-value travel destination that balances luxury, sustainability, and cultural authenticity.

Palm Beach County can enhance its tourism appeal by adopting key strategies from Bermuda, such as expanding seasonal demand through wellness retreats, culinary festivals, and luxury experiential travel. Investing in AI-driven personalization and a centralized digital hub for bookings and experiences would improve visitor engagement, while entrepreneur incubators and ambassador programs could foster local tourism innovation. Expanding niche sports tourism beyond golf and equestrian events, promoting eco-luxury and marine conservation tourism, and improving infrastructure and accessibility would further elevate the county's appeal. A refined branding strategy that highlights cultural depth, adventure tourism, and multi-generational travel could help Palm Beach stand out in a competitive luxury market, ensuring sustainable growth and year-round visitation.

HIGH VALUE VISITOR PREFERENCES: BERMUDA VS. PALM BEACH COUNTY

Bermuda stands out as a luxury island escape, ideal for travelers seeking exclusivity, marine adventure, and immersive cultural experiences. It is particularly appealing to ultra-high-net-worth travelers (American Royalty, Platinum Prosperity) who prefer private island retreats, superyacht events, and high-profile networking opportunities. Affluent couples and jetsetters (Couples with Clout, Jet Set Urbanites, and Sophisticated City Dwellers) will be drawn to Bermuda's high-end beach clubs, Michelin-quality dining, world-class spas, and intimate luxury experiences. Additionally, cultural travelers (Cosmopolitan Achievers and Philanthropic Sophisticates) will appreciate Bermuda's blend of British and Afro-Caribbean influences, exclusive festivals, historic sites, and marine conservation efforts. Older visitors (Boomers and Boomerangs) looking for historic charm and a slower-paced, picturesque getaway may also find Bermuda more appealing for a visit than Palm Beach.

Palm Beach County, while offering luxury, is more diverse and accessible in its tourism appeal, making it the preferred destination for families, sports enthusiasts, and budget-conscious travelers. Affluent suburban families (Kids and Cabernet, Picture Perfect Families, and Babies & Bliss) will find Palm Beach County far more accommodating with its family-friendly beaches, interactive museums, and kid-friendly attractions like Lion Country Safari. Multi-generational travelers (Across the Ages) will enjoy the mix of cultural, dining, and leisure options, while middle-class families (Family Fun-tastic) will appreciate the affordability of beaches, parks, and entertainment. Palm Beach County is also the clear winner for golf lovers (Golf Carts and Gourmets), given its abundance of championship courses, luxury country clubs, and elite golf resorts. Additionally, sports enthusiasts and event-driven travelers will find Palm Beach's tennis, equestrian, and water sports events more accessible and varied than Bermuda's sailing and cricket focus.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	Bermuda	PBC	Visits Bermuda for its exclusive island retreats but prefers PBC for its wealth-friendly policies, elite social scene, and luxurious estates.
	Platinum Prosperity	Bermuda	PBC	Bermuda offers a luxurious, private escape for travel, but PBC is preferred for its financial advantages and long-term high-end living.
	Kids and Cabernet	PBC	PBC	PBC wins for both visiting and living due to its upscale, family-friendly suburban setting, excellent schools, and outdoor activities.
	Picture Perfect Families	PBC	PBC	PBC is the top choice for both visiting and living, providing affluent suburban communities, high-end schools, and safe environments.
	Couples with Clout	Bermuda	PBC	Bermuda is an attractive vacation spot with its serene island luxury, but PBC offers a refined lifestyle with more long-term benefits.
	Jet Set Urbanites	Bermuda	PBC	Bermuda provides an exclusive travel experience, but PBC offers a more balanced and well-connected high-end urban lifestyle.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC is the preferred choice for both visiting and living, offering strong multi-generational appeal and a vibrant luxury community.
	Babies and Bliss	PBC	PBC	PBC is the best environment for young families, offering excellent schools, safe neighborhoods, and a high standard of suburban living.
	Family Fun-Tastic	PBC	PBC	PBC is the top destination for both visiting and living, with extensive family-oriented entertainment, parks, and activities.
	Cosmopolitan Achievers	Bermuda	PBC	Bermuda is an appealing travel destination for luxury-seekers, but PBC offers better career opportunities and a thriving social scene.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Bermuda	PBC	Bermuda is an elite vacation spot with a tranquil yet luxurious atmosphere, but PBC offers a dynamic, well-connected metropolitan experience.
	Golf Carts and Gourmets	PBC	PBC	PBC wins for both visiting and living, offering premier golf courses, fine dining, and an upscale leisure lifestyle.
	Philanthropic Sophisticates	Bermuda	PBC	Bermuda is a hub for global philanthropic networking, but PBC provides deep-rooted community involvement and year-round giving opportunities.
	Boomers and Boomerangs	Bermuda	PBC	Bermuda is a scenic travel destination for retirees, but PBC is the preferred place to live for its warm climate, strong community ties, and tax benefits.
	PALM BEACH WINS (OUT OF 14)	6	14	BERMUDA IS A PRIVATE, UPSCALE TRAVEL DESTINATION, YET PBC OFFERS A MORE ESTABLISHED ENVIRONMENT FOR LUXURY LIVING.

BENCHMARKING LESSONS

Palm Beach County can attract Bermuda's high-net-worth visitors by expanding its superyacht tourism, luxury resorts, and exclusive financial networking events. Strengthening its marina infrastructure and promoting elite yacht-to-land experiences—such as private golf retreats, bespoke dining, and high-end equestrian showcases—would help capture ultra-wealthy travelers who currently favor Bermuda. Additionally, developing a new ultra-luxury beachfront resort with private villas, spa retreats, and curated concierge services would position Palm Beach as a top-tier alternative for elite visitors. Hosting global wealth summits and private investment retreats could further solidify its status as a high-end business hub, drawing professionals who seek both financial opportunity and exclusive leisure experiences.

To win over affluent couples, jetsetters, and cultural travelers, Palm Beach should enhance its culinary and mixology scene with Michelin-star dining events, luxury wine experiences, and Caribbean-inspired cocktail festivals. Creating exclusive adults-only beach clubs with private cabanas, premium bottle service, and sunset catamaran cruises would elevate its romantic appeal. Additionally, expanding fashion tourism and luxury shopping events along Worth Avenue could attract designer brands and VIP clientele seeking exclusive retail experiences. For cultural travelers, launching a Palm Beach Cultural Heritage Festival, featuring Caribbean, Latin American, and European influences, would provide a high-end, immersive alternative to Bermuda's exclusive festivals.

Adventure-seeking visitors and marine tourism enthusiasts could be drawn in by developing Palm Beach Shipwreck & Reef Diving Tours, high-end eco-yacht excursions, and VIP sailing regattas to compete with Bermuda's dominance in maritime tourism. Expanding business and MICE tourism by hosting luxury executive retreats and CEO networking events at The Breakers or Eau Palm Beach would capture business travelers who currently look to Bermuda's finance conferences. With strategic destination development, high-end branding, and curated experiential tourism, Palm Beach County can compete directly with Bermuda's exclusivity while offering a more diverse, year-round luxury destination.



NASSAU

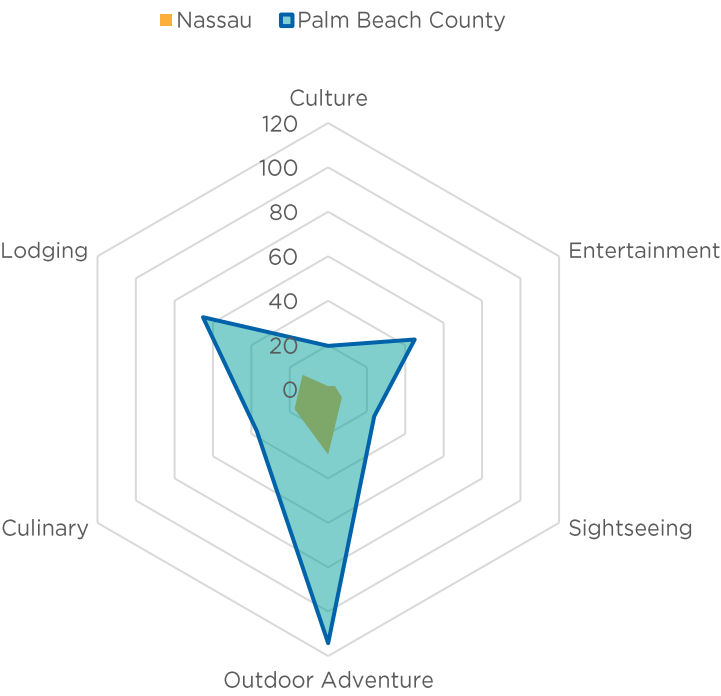
BAHAMAS



NASSAU BAHAMAS

Nassau, Bahamas, stands out as a premier island destination, renowned for its world-class resorts, crystal-clear waters, and vibrant cultural heritage, offering visitors a seamless blend of luxury, adventure, and authentic Caribbean experiences.

\$25 MILLION <small>(DMO)</small> \$141 MILLION <small>(GOVERNMENT)</small>	15.50% <small>(ALL HOTELS)</small> 21.00% <small>(SELECT RESORTS)</small>	11.2 MILLION
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



- CULTURAL IMMERSION**
- ECOLOGICAL TOURISM**
- WATER EXCURSIONS**
- MEGA RESORTS**

NASSAU BAHAMAS

OVERALL TAKEAWAYS

- **Distinct Destination Models:** Nassau thrives on resort-integrated tourism, while Palm Beach County excels in high-end residential and sports-driven tourism.
- **Luxury & Cultural Immersion:** The Bahamas offers all-inclusive luxury with built-in entertainment, whereas Palm Beach County could enhance its high-end experiential offerings through curated VIP travel packages, exclusive beach clubs, and cultural events.
- **Adventure & Eco-Tourism Expansion:** Nassau capitalizes on water-based adventure tourism, while Palm Beach could further develop yacht tourism, eco-lodges, and high-end outdoor experiences.
- **Sustainability & Conservation Leadership:** The Bahamas actively markets marine conservation and ecotourism, a model Palm Beach County could replicate by expanding sustainable tourism programs and eco-certifications.
- **Yachting & Boating Potential:** With The Bahamas excelling in cruise tourism, Palm Beach should focus on luxury yachting, marina expansions, and private charter experiences to attract high-net-worth visitors.
- **Cultural & Culinary Tourism Growth:** Nassau blends heritage, music, and food into its tourism strategy; Palm Beach could elevate its culinary and arts scene with signature festivals, fine art experiences, and immersive public art trails.
- **Infrastructure & Resort Development:** The Bahamas has made massive investments in hotels and ports; Palm Beach could expand boutique oceanfront resorts, develop experiential lodging, and enhance waterfront entertainment districts.
- **Competitive Positioning:** Palm Beach County's tourism appeal could grow by framing itself as a seamless luxury escape, integrating personalized concierge services, effortless travel experiences, and multi-day itineraries.

PRIMARY ASSETS

Nassau, Bahamas, and Palm Beach County, Florida, have both strategically leveraged their tourism assets to drive visitation, but they do so in distinct ways that reflect their unique geographic and cultural identities. Nassau has made creative use of its tropical island setting by integrating high-profile sports events like the Hero World Challenge and Bahamas Bowl, which capitalize on the allure of a winter getaway destination. Additionally, the Bahamas has developed an innovative approach to entertainment-driven tourism with large-scale resorts like Baha Mar and Atlantis, which offer integrated sports, entertainment, and convention spaces. These developments allow Nassau to cater to both leisure travelers and business event attendees, blending luxury experiences with immersive cultural elements such as the Junkanoo Festival and the Bahamas International Film Festival to further differentiate itself from other warm-weather destinations.

In contrast, Palm Beach County has established itself as a leader in high-end sports tourism and convention-driven visitation by leveraging its reputation as an equestrian, golf, resort, and cultural hub. Events like the Winter Equestrian Festival, Honda Classic, and MLB Spring Training cater to affluent travelers and sports enthusiasts, while its conference infrastructure—anchored by the Palm Beach County Convention Center and The Boca Raton—positions the region as a premier destination for corporate and luxury business events. Palm Beach County’s cultural scene also skews toward refined experiences, with institutions like the Norton Museum of Art and Kravis Center offering year-round programming that attracts sophisticated visitors. While Nassau focuses on integrating entertainment into resort experiences, Palm Beach County builds on its legacy of wealth and exclusivity, using elite sports, fine arts, and luxury festivals like SunFest and the Palm Beach Food & Wine Festival to enhance its appeal.

From a natural and historic tourism standpoint, both destinations capitalize on their landscapes in different ways. Nassau’s historic and ecological sites, such as Clifton Heritage National Park, Blue Lagoon Island, and the Pirates of Nassau Museum, create an appealing mix of adventure and heritage-based tourism that aligns with eco-conscious travel trends. Palm Beach County, meanwhile, offers a broader range of nature-based experiences tied to conservation and wildlife tourism. The Bahamas positions itself as an exotic, island-driven experience, while Palm Beach County markets its pristine coastal lifestyle and upscale recreational offerings. Ultimately, Nassau is more reliant on its resort-integrated tourism model, while Palm Beach County benefits from its well-established infrastructure catering to high-net-worth individuals, corporate travelers, and cultural connoisseurs.

UNIQUE ASSETS

Palm Beach County has an opportunity to elevate its tourism offerings by adopting strategies that have made Nassau and The Bahamas a global destination. While Palm Beach is known for its luxury real estate, golf courses, and equestrian culture, it lacks the scale of Nassau’s immersive cultural attractions. To bridge this gap, the County could introduce a permanent seafood and cultural market, similar to Nassau’s Arawak Cay, providing an authentic waterfront destination for food lovers and cultural tourists. Additionally, Palm Beach could enhance its culinary tourism scene with a luxury rum distillery and tasting experience, drawing inspiration from John Watling’s Distillery, or develop a wine, cigar, and chocolate lounge modeled after the renowned Graycliff Hotel. These experiential attractions would cater to high-end travelers while adding depth to the region’s dining and nightlife options.

Beyond food and drink, Palm Beach County could expand its interactive tourism assets by creating a scenic urban staircase attraction akin to Nassau’s Queen’s Staircase, developing an interactive flamingo and coastal wildlife center, and revitalizing historical sites like Peanut Island’s JFK Bunker to match Nassau’s emphasis on heritage tourism. Nassau has also capitalized on its waterfront with exclusive beach clubs and curated resort experiences, something Palm Beach could replicate by developing private boutique beach clubs in areas like Delray Beach or Jupiter. By strategically adapting these successful concepts, Palm Beach County could attract a broader audience beyond traditional luxury travelers, making it a more dynamic, experience-driven, and year-round destination.

RESPONDING TO TRENDS

Wellness and Medical Tourism: Luxury resorts such as The Ocean Club and SLS Baha Mar have positioned The Bahamas as a premier wellness destination by offering comprehensive spa retreats, beachfront yoga, and high-end wellness programs. Additionally, initiatives like Bahamasair's "Bahayogi" and the Bahamas Wellness and Anti-Aging Medical Institute support the growing demand for medical tourism and holistic health experiences.

Immersive Experiences: The Bahamas enhances visitor engagement through culturally immersive programs such as People-to-People, which connects travelers with local Bahamian families, and the Andros Ecotourism Collective, which offers guided experiences in the country's unique ecosystems. These initiatives align with the increasing demand for transformative travel experiences that foster deeper cultural and environmental connections.

Authenticity and Cultural Enrichment: The Bahamas integrates historical and cultural storytelling into its visitor experience through flagship events like Junkanoo Festival, culinary hubs such as Arawak Cay Fish Fry, and institutions like the National Art Gallery of The Bahamas. This approach reinforces the destination's distinct cultural identity, differentiating it from other Caribbean markets.

Sustainability: Recognizing the importance of environmental stewardship, The Bahamas has implemented sustainability initiatives such as the Reef Rescue Network, which involves visitors in coral restoration efforts, and The Bahamas National Trust, which manages over 30 national parks.

Content Creation: The Bahamas benefits from its pristine natural landscapes, luxury accommodations, and culturally rich experiences to drive destination visibility through influencer marketing and social media engagement. Resorts and tourism stakeholders actively invest in digital content strategies that highlight the destination's unique blend of relaxation, adventure, and culture.

Inclusivity: Nassau has prioritized diverse and multi-generational tourism by expanding ADA-compliant accommodations, inclusive resort offerings, and family-friendly attractions. Properties like Atlantis and Baha Mar are designed to accommodate travelers across all age groups, reinforcing the destination's appeal to families, multi-generational groups, and diverse market segments.

Multi-Generational Appeal: The Bahamas delivers broad-based visitor engagement by offering family-friendly resorts, interactive wildlife attractions, and experiential marine tourism, ensuring appeal to a wide range of demographics, from young families to retirees.

TOURISM STRATEGIES

Over the past five years, The Bahamas has implemented a diversified tourism strategy to broaden its visitor appeal. A key focus has been island differentiation, ensuring that each island is marketed as a distinct destination rather than a uniform Bahamian experience. This strategy encourages multi-island exploration and longer stays. Sustainability has also been prioritized through the Destination Stewardship Council, which aligns tourism growth with environmental conservation efforts. Additionally, The Bahamas has invested heavily in cruise tourism, enhancing Nassau's cruise port and expanding private island offerings to attract high-volume visitors. To further integrate culture and the arts into the visitor experience, events like the Culinary & Arts Festival at Baha Mar highlight local talent, reinforcing the country's cultural identity. Lastly, major infrastructure investments, including hotel expansions and a \$300 million cruise port redevelopment, have positioned The Bahamas as a luxury-driven, experience-based destination.

Palm Beach County can adopt similar strategies to elevate its position as a premier tourism destination. One approach is strengthening its distinct destination identities, marketing West Palm Beach as a trending live/work/play center, Jupiter as an eco-tourism hub, Wellington as the Equestrian Capital, Delray Beach as an arts and music district, and Boca Raton as a luxury golf and spa retreat. By clearly defining these micro-destinations, Palm Beach County can create a multi-stop visitor experience that increases length of stay and broadens visitor demographics. Additionally, expanding sustainable tourism initiatives would be beneficial. Establishing an "Eco-Palm Beach" certification for hotels and attractions, strengthening marine conservation programs, and promoting low-impact adventure tourism such as snorkeling, kayaking, and paddleboarding would position the county as a leader in environmentally responsible travel.

With Nassau's success in cruise tourism, Palm Beach County has an opportunity to expand its yachting and luxury boating tourism. Developing superyacht marinas, VIP docking privileges, and exclusive yacht-to-Bahamas itineraries would attract high-net-worth travelers who value seamless luxury experiences. At the same time, Palm Beach can elevate cultural and culinary tourism by launching a Palm Beach Culinary & Arts Festival, expanding interactive public art trails, and creating VIP cultural tourism experiences such as behind-the-scenes access to the Norton Museum, Kravis Center, and Morikami Museum.

To maintain its competitive edge, upgrading tourism infrastructure that aligns with emerging industry trends is also essential. Investments in new wellness resorts, an expanded entertainment district in West Palm Beach, and the revitalization of oceanfront boutique hotels would help Palm Beach appeal to next-generation travelers seeking premium yet experiential lodging. A more robust hospitality offering would further differentiate Palm Beach County from other Florida destinations while complementing its existing luxury market.

HIGH VALUE VISITOR PREFERENCES: NASSAU VS. PALM BEACH COUNTY

From our Experian Mosaic analysis, Nassau/Bahamas outperforms Palm Beach County as a vacation destination for demographics seeking luxury getaways, exotic experiences, and all-inclusive convenience. It excels with segments like Jet Set Urbanites, Cosmopolitan Achievers, Philanthropic Sophisticates, and Multi-Generational Travelers, who prioritize immersive culture, world-class resorts, and high-end hospitality.

On the other hand, Palm Beach County dominates as a long-term residence for nearly all segments. Its infrastructure, tax advantages, luxury real estate, healthcare, and private clubs make it a superior choice for affluent families, retirees, and professionals. The County particularly appeals to segments like Golf Carts and Gourmets, Boomers and Boomerangs, Platinum Prosperity, and Picture Perfect Families, who seek a stable, high-end lifestyle rather than a resort-driven escape.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC due to its refined luxury, wealth-friendly environment, and exclusivity.
	Platinum Prosperity	Nassau	PBC	Visits Nassau for its tropical high-end resorts but prefers PBC for its financial benefits and long-term luxury lifestyle.
	Kids and Cabernet	PBC	PBC	PBC wins for both visiting and living due to its upscale, family-friendly suburban setting and excellent schools.
	Picture Perfect Families	PBC	PBC	PBC is ideal for both visiting and living, providing safe, affluent suburban communities with family-oriented amenities.
	Couples with Clout	Nassau	PBC	Enjoys Nassau for luxury vacations but prefers PBC for its balance of leisure, culture, and wealth-friendly policies.
	Jet Set Urbanites	Nassau	PBC	Visits Nassau for its vibrant resort scene and global appeal but chooses PBC for its sophisticated, high-end urban lifestyle.
FLOURISHING FAMILIES	Across the Ages	Nassau	PBC	Nassau offers a tropical change of scenery for travel, but PBC is the preferred place to live due to its strong multi-generational communities.
	Babies and Bliss	PBC	PBC	PBC provides an optimal environment for young families, with quality schools, family-friendly entertainment, and suburban luxury.
	Family Fun-Tastic	Nassau	PBC	Nassau is a fun travel destination, but PBC wins as the preferred place to live for its suburban appeal and year-round recreational opportunities.
	Cosmopolitan Achievers	Nassau	PBC	Nassau is an appealing destination for leisure and international connections, but PBC offers a better balance of work, lifestyle, and networking.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	Nassau	PBC	Nassau provides a unique urban experience for travel, but PBC is preferred for its dynamic, high-end, and more developed metropolitan environment.
	Golf Carts and Gourmets	PBC	PBC	PBC wins for both visiting and living, offering premier golf courses, fine dining, and an established luxury leisure community.
	Philanthropic Sophisticates	Nassau	PBC	Nassau offers exclusive global philanthropic events, but PBC provides year-round engagement and a well-connected charitable community.
	Boomers and Boomerangs	Nassau	PBC	Nassau is an attractive travel escape, but PBC is the preferred home base for its warm climate, strong retirement appeal, and family-friendly environment.
	PALM BEACH WINS (OUT OF 14)	5	14	NASSAU IS A LUXURIOUS ISLAND ESCAPE FOR HIGH-NET-WORTH TRAVELERS, YET PBC REMAINS THE TOP CHOICE FOR LONG-TERM RESIDENCY.

BENCHMARKING LESSONS

To better compete with Nassau/Bahamas for high-spending travelers, Palm Beach County should focus on elevating its luxury appeal and creating seamless, all-inclusive-style experiences. Unlike Nassau's resort-driven model, Palm Beach lacks oceanfront, high-end immersion, making it essential to package curated itineraries that integrate private yacht charters, elite golf, beach club access, and VIP culinary experiences. Expanding waterfront luxury resorts and developing day-club concepts similar to Baha Mar's upscale offerings would strengthen its coastal exclusivity. Additionally, Nassau's cultural tourism scene, highlighted by Junkanoo and the Baha Mar Art Collective, offers an immersive experience that Palm Beach could match by expanding experiential festivals, luxury arts pop-ups, and exclusive fine dining events, positioning the county as a cultural destination, not just a leisure retreat.

To capture travelers seeking luxury adventure, Palm Beach could expand high-end water-based experiences such as yacht-to-private-island excursions, premium diving tours, and eco-lodge retreats. Addressing the ease of travel, Palm Beach should also streamline its airport-to-luxury pipeline with VIP concierge services and private transfers, mimicking the convenience Nassau offers to resort guests. A "Palm Beach JetSet" package with direct transfers from PBI/FLL/MIA to luxury hotels, marinas, and golf resorts could help position the county as a high-end yet effortlessly accessible destination. Ultimately, while Palm Beach is a top-tier residential market, these enhancements would transform it into a must-visit luxury escape, making it a more compelling alternative to The Bahamas for affluent vacationers.



SAN JUAN

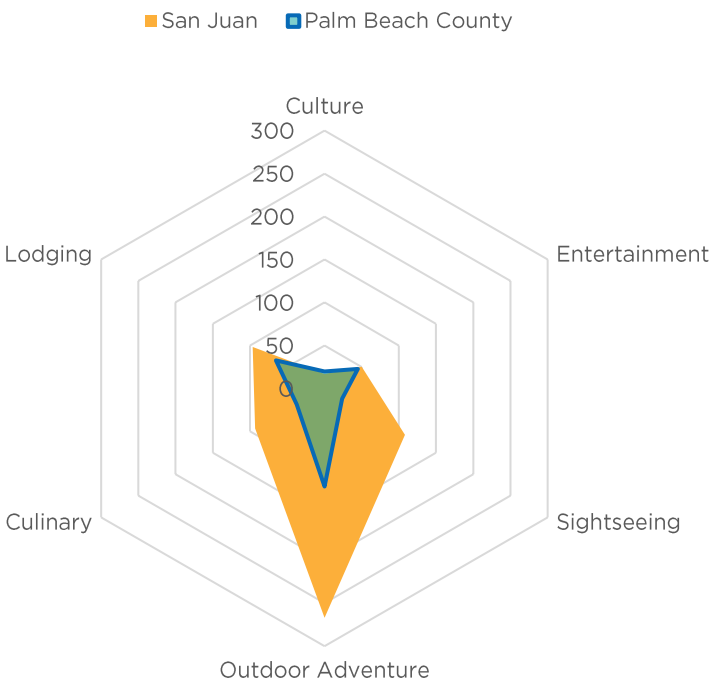
PUERTO RICO



SAN JUAN PUERTO RICO

San Juan is a vibrant Caribbean destination blending rich colonial history, luxury resorts, dynamic nightlife, cultural festivals, and adventure tourism, offering visitors an immersive and authentic Puerto Rican experience with a growing focus on sustainability, premium events, and digital innovation.

\$55.1 MILLION <i>(DISCOVER PUERTO RICO)</i>	7.00%	5.0 MILLION <i>(GENERAL ESTIMATE)</i>
DMO BUDGET	HOTEL TAX	REPORTED VISITORS



**CENTRAL
ENTERTAINMENT
DISTRICT**

SUPER FOOD FESTIVAL

**LOCAL & AUTHENTIC
STORYTELLING**

SAN JUAN PUERTO RICO

OVERALL TAKEAWAYS

- ***Puerto Rico's Tourism Economic Impact & Growth:*** Puerto Rico has experienced record-breaking tourism growth, ranking as the second fastest-growing destination in the world post-pandemic (per UNWTO). This suggests a highly successful strategy in demand generation and yield optimization that Palm Beach County could analyze for insights.
- ***Expanding Beyond Traditional Luxury & Family Tourism:*** San Juan's success in cultural, adventure, and eco-tourism has broadened its visitor appeal. Palm Beach County could diversify beyond golf, yachting, and resorts by investing in immersive heritage experiences, outdoor recreation, and agritourism.
- ***Developing a Centralized Entertainment District:*** San Juan's Distrito T-Mobile has transformed nightlife and event tourism by offering live music, dining, and adventure attractions in one location. Palm Beach County could create a similar entertainment hub to consolidate nightlife and elevate visitor engagement.
- ***Leveraging Festival & Event Tourism:*** San Juan drives major visitation through events like the San Sebastián Street Festival, which celebrates local culture. Palm Beach County could develop a flagship cultural festival featuring live performances, food, and artisan markets to attract a broader audience.
- ***Enhancing Outdoor & Adventure Tourism:*** San Juan's El Yunque National Forest and bioluminescent bays make it a premier destination for nature-based tourism. Palm Beach County could expand eco-tourism offerings such as guided wildlife excursions, night kayaking, and adventure-based luxury tourism.
- ***Adopting AI & Smart Tourism Strategies:*** San Juan has integrated AI-driven recommendations and digital marketing to enhance visitor engagement. Palm Beach County could implement AI-powered trip planning, augmented reality heritage tours, and smart tourism kiosks to modernize its tourism experience.
- ***Strengthening Sustainability & Conservation Tourism:*** Puerto Rico has embraced eco-friendly lodging, conservation efforts, and sustainability initiatives to align with global travel trends. Palm Beach County could develop sustainable tourism programs, farm-to-table experiences, and conservation-focused visitor education.
- ***Investing in Culinary & 'Eatertainment' Tourism:*** San Juan's gastronomic tours and food festivals have strengthened its tourism economy. Palm Beach County could expand its culinary tourism offerings through chef-led experiences, food and wine festivals, and immersive farm-to-table events.
- ***Targeting Young, Experience-Driven Travelers:*** San Juan attracts affluent young professionals and urban explorers through its nightlife, adventure, and cultural experiences. Palm Beach County could develop late-night venues, pop-up cultural experiences, and high-energy adventure tourism to capture this demographic.

PRIMARY ASSETS

San Juan, Puerto Rico, is a dynamic tourism destination that blends rich history, cultural vibrancy, natural beauty, and modern entertainment. Visitors are drawn to its Spanish colonial forts, lively festivals, and pristine beaches, while the Distrito T-Mobile entertainment district and Puerto Rico Convention Center provide modern attractions that enhance its appeal. Accessibility is a significant advantage, as U.S. citizens can travel without a passport, and the city continues to evolve with infrastructure improvements that support both leisure and business travelers.

Despite its strengths, San Juan faces challenges related to economic constraints, infrastructure strain, and natural disasters. Some tourists have noted issues such as inconsistent service quality, safety concerns in certain areas, and beach maintenance problems. However, public-private partnerships and sustainability initiatives aim to improve the city's infrastructure and visitor experience, ensuring that its tourism industry remains resilient.

In recent years, San Juan has focused on key tourism strategies, including expanding luxury tourism, enhancing cultural and eco-tourism offerings, investing in major events, and adopting AI-driven marketing to attract diverse visitor segments. Culinary tourism is thriving with gastronomic tours and high-end fusion restaurants, while cruise tourism is receiving a boost from multimillion-dollar port renovations. Festivals like the San Sebastián Street Festival showcase Puerto Rican culture, while outdoor adventures in El Yunque National Forest and the bioluminescent bays appeal to nature lovers.

Comparing San Juan to Palm Beach County, both destinations cater to affluent travelers but offer distinct experiences. San Juan is more immersive and adventure-driven, rich in culture and history, while Palm Beach County leans into exclusivity, luxury, and high-end lifestyle tourism. San Juan's strengths lie in its authentic Caribbean atmosphere, historic charm, and diverse tourism offerings, whereas Palm Beach County excels in golf, equestrian sports, fine dining, and high-net-worth residential appeal. By refining its tourism strategies and infrastructure investments, San Juan is positioning itself as a premier, multi-faceted Caribbean destination with a balance of culture, nature, and entertainment.

TRANSFERRABLE ASSETS

San Juan has successfully developed a diverse and immersive tourism landscape, with initiatives that could be adapted to enhance Palm Beach County's visitor appeal. Distrito T-Mobile, a centralized entertainment hub featuring live music, dining, and adventure attractions, has positioned San Juan as a nightlife and events destination, something Palm Beach County could replicate to create a focal point for entertainment. Likewise, San Juan's San Sebastián Street Festival, which attracts hundreds of thousands of attendees annually, highlights the power of cultural festivals in drawing visitors and fostering local engagement—Palm Beach County could expand its own festival scene to celebrate its distinct heritage. Additionally, Puerto Rico has embraced sustainable tourism practices, using eco-friendly programs to protect its natural and cultural assets, an approach Palm Beach could adopt to appeal to environmentally conscious travelers. Agrotourism has also gained traction, with visitors engaging in farm tours, local produce tastings, and agricultural workshops—something Palm Beach's own farming communities could capitalize on.

Beyond physical attractions, community-based tourism has flourished in San Juan, offering visitors the chance to connect with locals and participate in meaningful cultural exchanges, which Palm Beach County could integrate into its tourism strategy. Historical site promotion is another key area where San Juan excels, using storytelling and guided tours to showcase its colonial past—Palm Beach County could do the same by amplifying the narratives of its Gilded Age mansions and historic districts. Culinary tourism has also been a major success in Puerto Rico, with the “Live Boricua” campaign promoting local cuisine, a model that Palm Beach County could adapt with food festivals, cooking classes, and farm-to-table experiences.

RESPONDING TO TRENDS

Wellness and Sustainability: Travelers are increasingly seeking destinations that foster deep connections with local cultures and environments. This year, there’s a noticeable shift toward eco-friendly accommodations and activities that minimize environmental impact.

Immersive and Authentic Experiences: The “Live Boricua” campaign, launched in March 2024, deepened its connection to Puerto Rico’s vibrant culture. Directed by Puerto Rican filmmaker Luis Gerard and captured through the lens of photographer Stephanie Segarra, the campaign featured an entirely local cast and crew. It highlighted immersive experiences such as exploring El Yunque, dining with renowned chef Mario Pagán in Condado, relaxing at Luquillo Beach, and dancing at La Factoría in Old San Juan.

Technology Integration and AI: Discover Puerto Rico has embraced technological innovation by partnering with leading tech companies to implement AI-driven solutions. Collaborations with Anoki and Clicktripz have enhanced marketing strategies and streamlined trip planning, ensuring that promotional materials reach relevant consumers and facilitate seamless travel arrangements.

Culinary Tourism (“Eatertainment”): The inaugural Puerto Rico Wine and Food Festival, set to debut in 2025, aims to showcase the island’s world-class culinary talent. This event reflects the growing trend of ‘eatertainment,’ where culinary experiences are combined with entertainment, offering visitors a dynamic way to engage with local gastronomy.

Festivals and Cultural Events: San Juan’s vibrant festival scene, including events like the San Sebastián Street Festival, continues to draw visitors seeking authentic cultural experiences. These festivals offer immersive opportunities to engage with Puerto Rican traditions, music, and art.

Outdoor Adventure and Photo Opportunities: With its diverse landscapes, San Juan offers numerous outdoor activities, from hiking in El Yunque National Forest to exploring pristine beaches. These natural settings provide ample opportunities for photography and content creation, catering to travelers eager to capture and share their experiences.

TOURISM STRATEGIES

San Juan has strategically positioned itself as a premier Caribbean destination through infrastructure development, luxury tourism expansion, cultural and natural tourism diversification, event-driven tourism, and AI-powered marketing. Investments in airport expansions, cruise port enhancements, and the Puerto Rico Convention Center District have bolstered accessibility and tourism capacity. The city has also leveraged tax incentives to attract high-net-worth individuals, driving a boom in luxury real estate, hotels, and gated communities in areas like Condado and Dorado Beach. Meanwhile, the preservation and promotion of Old San Juan, El Yunque National Forest, and the island's bioluminescent bays highlight San Juan's commitment to cultural and eco-tourism sustainability.

To sustain growth, San Juan has embraced festival and event tourism as an economic engine, attracting over 200,000 attendees to the San Sebastián Street Festival, while new gastronomic festivals, esports tournaments, and sports tourism events continue to boost visitation. Simultaneously, AI-driven marketing initiatives—such as partnerships with Anoki and Clicktripz—allow Discover Puerto Rico to enhance personalized travel recommendations and market the destination more effectively. These strategies collectively enhance visitor experiences, increase economic impact, and ensure San Juan remains competitive in global tourism.

Palm Beach County can adapt many of San Juan's strategies to enhance its own appeal. Improving air connectivity with new direct flights from Europe and Latin America could attract a broader international audience. Expanding luxury real estate marketing efforts to mirror San Juan's success could further entice second homeowners and extended-stay visitors. Additionally, Palm Beach could benefit from elevating cultural storytelling—focusing on its Gilded Age mansions, African American heritage, and historic districts—while also investing in eco-tourism initiatives like water-based adventure tourism in the Loxahatchee National Wildlife Refuge.

Furthermore, Palm Beach County could expand its festival and event tourism strategy, creating a flagship cultural event akin to the San Sebastián Street Festival while attracting marquee concerts and sports tournaments to boost overnight stays. Embracing AI-driven tourism marketing, influencer partnerships, and personalized trip planning tools would further position Palm Beach as a year-round destination, broadening its appeal beyond seasonal luxury travelers. By leveraging San Juan's successful tourism strategies, Palm Beach County can enhance its competitiveness, diversify its visitor base, and maximize its long-term economic impact.

HIGH VALUE VISITOR PREFERENCES: SAN JUAN VS. PALM BEACH COUNTY

This comparative analysis reveals that San Juan and Palm Beach County appeal to different types of travelers, with San Juan emerging as the stronger choice for visitors seeking cultural depth, nightlife, and adventure, while Palm Beach County excels in luxury and family-friendly experiences. San Juan wins as a destination for high-income cultural travelers, young professionals, and couples looking for an immersive getaway, thanks to its historic sites, vibrant festivals, Caribbean nightlife, and unique eco-tourism attractions like El Yunque and the bioluminescent bays. Its walkable streets, rich culinary scene, and lively entertainment districts, such as La Placita de Santurce and Distrito T-Mobile, make it a dynamic hotspot for those looking for excitement and authenticity.

Meanwhile, Palm Beach County outshines San Juan in attracting affluent families, multi-generational travelers, and middle-class vacationers who prioritize safety, accessibility, and structured entertainment. With world-class golf courses, pristine beaches, equestrian events, and high-end shopping districts, Palm Beach caters to those seeking relaxation, exclusivity, and premier recreational experiences. Additionally, its family-oriented attractions, including zoos, water parks, and cultural institutions like the Norton Museum of Art, make it a well-rounded choice for travelers looking for a balance of luxury and leisure. While San Juan offers vibrant cultural energy, Palm Beach County provides a polished, high-end vacation experience, making it the preferred choice for visitors prioritizing refinement, comfort, and upscale lifestyle tourism.

	TARGET TRAVELER SEGMENT	PREFERRED PLACE TO VISIT	PREFERRED PLACE TO LIVE	REASONING
POWER ELITE	American Royalty	PBC	PBC	Prefers both visiting and living in PBC due to its exclusivity, wealth-friendly environment, and refined luxury lifestyle.
	Platinum Prosperity	San Juan	PBC	Visits San Juan for its vibrant culture, tropical appeal, and luxury resorts but lives in PBC for its financial advantages and elite social scene.
	Kids and Cabernet	PBC	PBC	Chooses PBC for both visiting and living due to its family-friendly suburban environment, top-tier education, and outdoor activities.
	Picture Perfect Families	PBC	PBC	PBC provides a safe, upscale, and well-rounded environment for families, making it the preferred choice for both visiting and living.
	Couples with Clout	San Juan	PBC	Enjoys visiting San Juan for its historic charm and high-end hospitality but prefers PBC for its relaxed luxury and refined community.
	Jet Set Urbanites	San Juan	PBC	Visits San Juan for its lively urban culture but chooses PBC for its high-end city conveniences and exclusive living.
FLOURISHING FAMILIES	Across the Ages	PBC	PBC	PBC is the top choice for both visiting and living, offering strong multi-generational appeal, a stable economy, and an active community.
	Babies and Bliss	PBC	PBC	PBC provides an ideal environment for young families, with quality schools, safe neighborhoods, and abundant recreational opportunities.
	Family Fun-Tastic	PBC	PBC	PBC wins as the ultimate destination for both visiting and living, offering family-friendly entertainment, outdoor spaces, and quality of life.
	Cosmopolitan Achievers	PBC	PBC	PBC is the clear winner for both visiting and living, offering a strong mix of career opportunities, high-end experiences, and cultural vibrancy.
BOOMING WITH CONFIDENCE	Sophisticated City Dwellers	San Juan	PBC	San Juan is an exciting city for travel with its historic sites and dynamic atmosphere, but PBC is preferred for its polished urban experience and high quality of life.
	Golf Carts and Gourmets	San Juan	PBC	San Juan offers a unique mix of golf and coastal experiences for visitors, but PBC is preferred for its elite golf courses and fine dining.
	Philanthropic Sophisticates	PBC	PBC	PBC wins for both visiting and living, offering year-round philanthropic engagement and a deep sense of community.
	Boomers and Boomerangs	PBC	PBC	PBC remains the top choice for both visiting and living due to its warm climate, multi-generational communities, and strong retirement appeal.
	PALM BEACH WINS (OUT OF 14)	9	14	SAN JUAN IS AN EXCITING CULTURAL TRAVEL DESTINATION, BUT PBC IS THE PREFERRED PLACE TO LIVE FOR ITS ECONOMIC STABILITY AND EXCLUSIVE COMMUNITIES.

BENCHMARKING LESSONS

To attract travelers who currently prefer visiting San Juan, Palm Beach County can develop culturally immersive, adventure-driven, and nightlife-focused tourism experiences. Creating a Distrito T-Mobile-style entertainment district in West Palm Beach or Boca Raton, complete with live Latin music venues, rooftop bars, and waterfront nightlife, would appeal to young professionals and couples seeking high-energy experiences. Expanding cultural storytelling through interactive historic districts, public art installations, and culinary heritage tours can elevate Palm Beach's identity as a dynamic destination for high-income cultural travelers. Additionally, introducing a flagship Palm Beach International Street Festival with live performances, artisan markets, and Caribbean-inspired entertainment would rival San Juan's San Sebastián Street Festival and position Palm Beach as a premier festival-driven tourism hub.

To compete with San Juan's adventure tourism appeal, Palm Beach County can enhance water-based eco-adventures such as night kayaking, paddleboarding trails, and artificial reef snorkeling experiences to attract nature-focused visitors. Creating an adventure tourism hub featuring ziplining, mangrove excursions, and deep-sea fishing experiences could further diversify offerings. Partnering with luxury yacht brands to promote high-end sailing and sportfishing would also align with Palm Beach's upscale reputation while appealing to adventure-seeking luxury travelers. Additionally, expanding bilingual tourism experiences and community-driven pop-up markets can create more inclusive, immersive encounters, helping visitors connect with local artists, entrepreneurs, and cultural traditions.

Leveraging AI-powered destination marketing and influencer partnerships can further position Palm Beach as an experience-driven alternative to San Juan. Using AI-driven content campaigns and personalized itinerary-building tools, Palm Beach County can target experience-seeking travelers looking for a mix of adventure, culture, and nightlife. Expanding hands-on experiences, such as cooking classes, dance lessons, and social impact tourism initiatives, would also enhance the county's authenticity and opportunities for engagement.

PRELIMINARY IDEAS

Based on findings from the 20 destination case studies and the results of the Visitor Preference Analysis, CSL prepared a preliminary list of destination development opportunities for Palm Beach County. These are summarized below.

EXCLUSIVE TRAVEL EXPERIENCES

1. *Yacht Charters and Marina Enhancements*

- Develop a premier mega-yacht marina with exclusive services, such as private docking areas, luxury concierge services, and yacht provisioning with top-tier brands.
- Offer curated luxury yacht itineraries to explore the Florida coast and nearby islands.

2. *Private Jet Services*

- Enhance Palm Beach International Airport facilities for private jet travelers with exclusive lounges and concierge services.
- Partner with luxury private aviation companies to offer bespoke vacation packages.

3. *Brightline Partnership*

- Consider VIP booth on select trains to Palm Beach County.

LUXURY ACCOMMODATIONS

4. *Exclusive Villas and Estates for Rent*

- Promote high-end vacation rentals in Palm Beach's iconic estates, complete with private chefs, butlers, and luxury transportation.

5. *Private Island Experiences*

- Develop partnerships with nearby private islands to offer one-day or weekend-long exclusive retreats.

6. *High-End, One of a Kind Beach Clubs*

- Perhaps led by resorts, develop luxury clubs and cabana spaces at select beaches throughout the County.

7. *Influencer Retreat House*

- Build or designate a high-end estate to host retreats or prolonged residencies of high-end influencers.

CULTURAL IMMERSION

8. Private Art Tours and Commissions

- Collaborate with local galleries and collectors to offer private, behind-the-scenes tours of iconic art collections.
- Facilitate art commissions with renowned Palm Beach-based artists.

9. Historic Landmark Buyouts

- Offer private access to landmarks like the Flagler Museum or Society of the Four Arts for exclusive dinners or events.

ADVENTURE & EXPLORATION

10. Luxury Safari-Style Wildlife Experiences

- Create exclusive wildlife encounters, such as private Everglades airboat tours, with luxury amenities and expert naturalist guides.

11. Underwater Adventures

- Develop premium snorkeling or scuba diving packages to nearby coral reefs with private yachts and marine biologists.
- Install underwater world class public art or explorable reef structures for highly unique and photographable diving experiences.

12. Glamping Development

- Add high-end glamping experiences at/near resort properties like some of the comparable destinations.

WELLNESS & RELAXATION

13. Luxury Spa Retreats

- Open a world-class wellness retreat offering exclusive treatments with ocean views and wellness programs tailored to individual guests.

14. Private Fitness and Wellness Coaches

- Partner with luxury hotels and residences to offer private yoga, fitness, and wellness coaching sessions.
- Host special beachside meditations, yoga sessions, and night walks.

EXCLUSIVE EVENTS & EXPERIENCES

15. Private Concerts and Entertainment

- Host intimate, invite-only concerts or performances by world-class musicians and entertainers at luxury venues like The Breakers or the Norton Museum of Art.

16. VIP Polo and Equestrian Packages

- Build exclusive packages around Palm Beach's polo scene and events at the Wellington Equestrian Center, including VIP access to matches, private stables tours, and even equestrian lessons with elite trainers.

17. Gastronomic Experiences

- Create exclusive dining events with celebrity chefs and wine pairings at iconic locations like Worth Avenue or on private estates.

PHILANTHROPIC EXPERIENCES

18. Conservation Partnerships

- Offer VIP eco-tourism opportunities, such as sea turtle preservation programs or coral reef restoration projects.

19. Cultural Preservation

- Allow visitors to support the restoration of historic Palm Beach landmarks with exclusive donor access to the projects.

HIGH-END HOBBIES

20. Private Golf Courses

- Offer VIP memberships or day passes to Palm Beach's most exclusive private golf clubs, including concierge golf planning.

21. Luxury Car Tours

- Host events or rentals of exotic and vintage cars for scenic drives along the coast.

22. Customized Fashion Experiences

- Partner with Worth Avenue boutiques for private shopping, personal stylists, and behind-the-scenes experiences with designers.

TAILORED LUXURY SHOPPING

23. Exclusive Jewelry Design

- Collaborate with Palm Beach jewelers to offer bespoke jewelry-making experiences or high-profile private trunk shows.

24. Private Shopping on Worth Avenue

- Elevate Worth Avenue by creating VIP shopping experiences, including private access to boutiques after hours and curated personal shopping services.

FESTIVALS AND EVENTS

25. High-End Destination Festival

- Create a one-of-a-kind, high-end, experiential festival that attracts celebrities, influencers and industry leaders.
- Performances, exclusive dining, exhibitions, transformative experiences, educational sessions.

26. Prioritize High-Impact Meetings

- Develop infrastructure and aggressively target shareholder meetings, corporate retreats, and other events from tech, medical and financial sectors.

CULTIVATING CULINARY

27. Growing High-End Dining

- Target and attract best-in-class chefs from around the world to invest and set up shop in Palm Beach County.

28. Growing Experiential Dining

- Incentivize developers and chefs with unique, high-end dining concepts that also feature immersive technology, unique ambiance, live music, spa or experiential elements that appeal to high-value visitor segments.

29. Agritourism as a Storyteller

- Partner with farmers, chefs, artists and event suppliers to create unique dining experiences and tours at area farms.

EVENT FACILITY INVESTMENT

30. Sports Facilities

- Develop and enhance area amateur sports facilities to offer industry leading hospitality amenities, technology and atmosphere.

31. Convention and Entertainment Facilities

- Invest in premium seating, high-end food & beverage and immersive experiences at existing venues.



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TOURISM DIVERSITY
MATTERS

FROM ALL OF US AT CSL THANK YOU

MARCH 2025

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