



**CSL**

**PALM BEACH COUNTY TOURISM MASTER PLAN**

# **SITUATIONAL ANALYSIS REPORT**

**JUNE 2025**





# INTRODUCTION

## INTRODUCTION

*This Situational Analysis Report* forms the foundation for the Palm Beach County Tourism Master Plan by synthesizing the findings of a yearlong research and engagement process into a clear, evidence-based understanding of the county’s tourism landscape. Drawing on field assessments, stakeholder interviews, market analyses, and community and visitor surveys, the analysis identifies the county’s greatest assets, emerging challenges, and strategic opportunities across key themes such as infrastructure, branding, sustainability, governance, and community impact. This report presents a comprehensive snapshot of where Palm Beach County stands today as a visitor and resident destination—and sets the stage for actionable recommendations that will guide the county toward a more inclusive, resilient, and competitive tourism future.

## KEY TAKEAWAYS

Palm Beach County stands at a critical juncture in its tourism evolution. This *Situational Analysis Report* prepared for the Tourism Master Plan reveals a destination rich in assets but facing a host of challenges that, if left unaddressed, could limit its long-term competitiveness and community benefit. Drawing from months of field research, stakeholder engagement, municipal plan reviews, visitor and resident surveys, and benchmarking studies, the findings paint a nuanced picture of both promise and pressure.

At the heart of the County’s tourism offering is its remarkable diversity of experiences. From luxury resorts like The Breakers to natural wonders such as the Arthur R. Marshall Loxahatchee National Wildlife Refuge, from world-class cultural institutions to thriving beach towns, Palm Beach County caters to an expansive range of traveler interests. Yet this richness is unevenly distributed. The eastern third of the county—coastal cities like West Palm Beach, Boca Raton, and Delray Beach—houses the majority of tourism infrastructure and activity, while western communities such as Belle Glade and Pahokee remain largely disconnected from the visitor economy. This geographic imbalance underscores the need for more equitable investment and a broader view of destination development.

Infrastructure emerged as one of the most urgent areas for improvement. Across nearly every municipality, there was consensus that aging water, sewer, stormwater, and transportation systems are not keeping pace with tourism demand. Road congestion, especially along major corridors like US-1 and A1A, limited public transit, inadequate pedestrian networks, and insufficient parking all contribute to a strained visitor experience—particularly during peak seasons. These issues are compounded by limited beach access, which is paradoxically one of the most commonly cited obstacles in a destination defined by its coastline.

While Palm Beach County enjoys a strong cultural reputation, the connection between arts institutions and the tourism ecosystem remains underdeveloped. Places like the Kravis Center and Norton Museum of Art draw high-value cultural visitors, yet their potential is not fully leveraged through tourism-focused programming or marketing. Similarly, eco- and agri-tourism assets are plentiful, but lack investment in amenities, interpretation, and promotion necessary to reach their full potential.

A rising concern throughout the research is overtourism—marked by infrastructure strain, environmental degradation, and rising tensions between growth and livability. Stakeholders repeatedly pointed to the housing crisis, where escalating real estate values and the proliferation of short-term rentals are pushing essential workers—particularly in hospitality and the arts—out of the county. At the same time, the natural environment, from beaches to parks, is showing signs of overuse. Without intervention, Palm Beach County risks compromising the very qualities that make it attractive to visitors.

Importantly, residents expressed broad support for tourism, recognizing its economic contributions. But this support is conditional. Residents want growth to be managed wisely, infrastructure to be modernized, and benefits to be shared more equitably. Full-time residents, in particular, voiced concern about affordability, quality of life, and the need for dual-purpose investments—such as trails, parks, and beach amenities—that serve both locals and tourists. Meanwhile, part-time residents, many of whom are older and more affluent, focused more on convenience, aesthetics, and leisure quality.

The destination’s sustainability practices received mixed marks. The Global Sustainable Tourism Council evaluation found strong performance in governance and community engagement, but weak adoption among private tourism businesses and limited environmental data tracking. Critical gaps remain in renewable energy, climate resilience planning, water use efficiency, and sustainable transportation infrastructure. Strengthening business engagement and establishing unified performance dashboards will be essential to moving the county toward global best practices in sustainable tourism.

The assessment also revealed that Palm Beach County’s destination branding needs modernization. While “The Palm Beaches” retains strong awareness, it is often perceived as exclusive and traditional—less resonant with younger travelers, cultural explorers, or those seeking meaningful and sustainable experiences. A shift toward an “Explorer” brand archetype is recommended, emphasizing cultural authenticity, wellness, and connection to place. At the same time, a more unified and collaborative branding and marketing strategy across the 39 municipalities would help create consistency and reduce duplication of effort. Enhancements in digital presence, SEO, influencer marketing, and storytelling are also critical, especially as social media emerges as a powerful driver of visitor engagement.

Community First considerations were also elevated in the analysis. Although progress has been made, including the integration of diverse voices in campaigns and programs, accessibility gaps and perceptions of exclusivity remain. Many venues lack accommodations for visitors with disabilities or neurodivergence, and smaller cultural organizations—often those most rooted in underrepresented communities—face serious funding constraints. Stakeholders called for the creation of a comprehensive accessibility guide, inclusive marketing, and stronger partnerships with local advocacy groups.

Visitor surveys reinforce many of these insights. The county draws a loyal, affluent, and older visitor base, with high levels of satisfaction—especially around climate, beaches, dining, and scenic beauty. However, visitors consistently flagged traffic, affordability, and access as pain points. There is a clear opportunity to deepen their experience through better mobility options, more diverse entertainment and cultural programming, and continued investment in placemaking and event activation.



In sum, the Situational Analysis reveals a county with immense tourism potential but also complex dynamics to navigate. The Palm Beach County Tourism Master Plan must be more than a promotional roadmap—it must guide the county toward sustainable, inclusive, and resilient tourism development. This means addressing infrastructure and equity gaps, balancing growth with quality of life, and crafting a brand and experience that reflect the full richness of the county’s people, places, and possibilities. With strategic alignment and bold vision, Palm Beach County can solidify its standing as a world-class destination while enhancing the well-being of its communities.

Full details for each of the research reports that follow can be found on the Tourism Master Plan landing page [click here](#).



In July 2024, CSL International conducted an in-depth familiarization tour of Palm Beach County, visiting nearly 80 tourism-related sites, attractions, venues, and districts. This hands-on assessment—coordinated with Discover the Palm Beaches—provided critical insights into the county’s tourism assets, challenges, and opportunities. The observations gathered through this effort have shaped early implications for the Tourism Master Plan and underscore the need for a strategic and balanced approach to destination development.

One of the key findings was the county’s strong foundation in ecotourism and quality-of-life assets, including places like the Arthur R. Marshall Loxahatchee National Wildlife Refuge and the Gumbo Limbo Nature Center. These sites are environmentally significant and provide potential for nature-based tourism; however, their direct economic impact remains limited. Enhancements such as upgraded amenities, trail systems, and specialized programming were recommended to increase their appeal and visitation.

Cultural and artistic venues emerged as another strength. Sites such as the Norton Museum of Art, Kravis Center, and the planned Boca Arts and Innovation Center contribute to the county’s identity as a destination for arts and culture. These institutions attract high-value visitors and reinforce the area’s sophistication. Strengthening cross-promotional marketing efforts and investing in programming could further amplify their impact.

The assessment also highlighted the value of the county’s sports and recreational infrastructure, such as the spring training facilities at CACTI Park and Roger Dean Chevrolet Stadium, the National Polo Center in Wellington, and the many county, municipal and regional parks. These facilities support both resident wellness and tourism, particularly among mid- and upscale hotel markets. While many are in strong condition, continued investment is needed to ensure they remain competitive and meet the demands of both sports tourism and community use.

At the same time, CSL observed challenges within aging or underperforming retail and mixed-use developments, including properties like Boynton Beach Mall and CityPlace. Some of these districts are undergoing redevelopment efforts, which were seen as promising strategies to revitalize commercial vitality and strengthen their role in attracting tourists and residents alike.



Infrastructure and accessibility improvements were flagged as high-priority needs. The ongoing expansion of Palm Beach International Airport and improvements to transportation infrastructure around major visitor sites are critical for supporting tourism growth. Enhanced mobility options will not only improve visitor experience but also enable greater regional dispersion of tourist activity.

The county's diverse mix of tourist offerings—from luxury resorts like The Breakers to family-oriented destinations such as Lion Country Safari and walkable beach districts like Atlantic Avenue in Delray Beach—creates a rich and appealing menu of experiences. The Tourism Master Plan should emphasize the promotion of this diversity to appeal to different visitor segments, including families, cultural explorers, and high-end leisure travelers.

In the area of meetings and conventions, the Palm Beach County Convention Center was recognized as a strong asset, though in need of updates to match evolving industry standards and expectations of high-end corporate clients. The planned development of a new headquarter hotel adjacent to the center is expected to enhance its competitiveness. There is also an opportunity to more tightly integrate convention offerings with nearby assets—such as luxury resorts, equestrian venues, and unique outdoor experiences—to deliver standout group travel experiences.

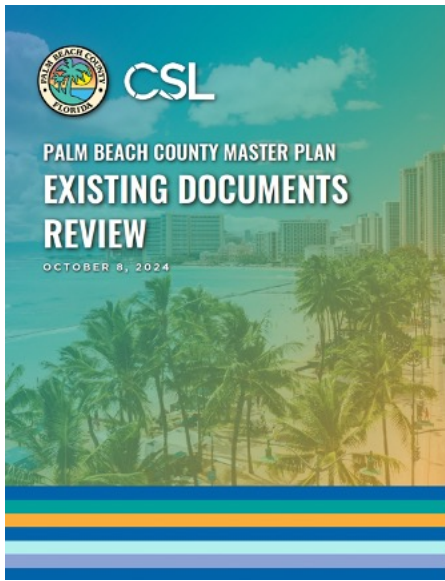
The county's growing presence in music and festival tourism was also noted. With venues like the iTHINK Financial Amphitheatre or the Meyer Amphitheatre in West Palm, Palm Beach County is well-positioned to become a music and performance destination. Continued investment in festivals, public art, and street-level activation can elevate this positioning.

Urban growth trends, particularly in West Palm Beach, are shaping new visitor districts. The city is evolving into a vibrant live/work/play environment. Integrating tourism priorities into broader master planning efforts will help harness this momentum and ensure that development serves both residents and visitors.

Importantly, the familiarization tour revealed significant disparities in economic conditions and visitor experience across neighborhoods. While affluent areas like Palm Beach offer polished and upscale tourism experiences, other areas, particularly north of downtown and communities such as Belle Glade, suffer from neglect and underinvestment. Addressing these disparities through equitable investment and destination development in underserved communities is essential for ensuring inclusive tourism growth.

In summary, the familiarization tour underscored that Palm Beach County is rich in tourism assets but must address infrastructure needs, economic disparities, and shifting visitor expectations to unlock its full potential. By investing strategically in cultural venues, public amenities, transportation, and inclusive experiences, the county can deliver a more holistic, equitable, and resilient tourism ecosystem—one that benefits residents and positions Palm Beach County as a premier destination for a wide range of travelers.

[Click here for the Familiarization Report.](#)



As part of the groundwork for developing the Palm Beach County Tourism Master Plan, CSL International conducted an extensive review of existing strategic documents from 32 of the County’s 39 municipalities, along with a selection of countywide and regional plans. This effort aimed to uncover recurring themes, challenges, and opportunities that should inform the countywide tourism strategy. The review revealed a number of consistent priorities and concerns across municipalities—many of which are foundational to both sustaining current tourism activity and unlocking new growth.

One of the most common and urgent issues identified was the problem of aging infrastructure. Many municipalities flagged the need to upgrade water, sewer, and stormwater systems—particularly in areas that experience high tourist traffic. Without these investments, communities may struggle to support both residents and visitors, undermining the quality of the visitor experience and limiting future growth potential.

Traffic congestion emerged as another significant concern, especially along major corridors such as U.S. Highway 1 and State Road A1A. The limited pedestrian and bicycle infrastructure further compounds connectivity issues. Several plans recommended improving multimodal transportation options—such as bike lanes, walkable paths, and better public transit connections between hotels, airports, and major attractions—as essential to enhancing mobility and access for tourists.

Environmental sustainability and eco-tourism were emphasized across multiple municipalities. Palm Beach County’s rich natural resources—including beaches, parks, and conservation areas—are considered central to its tourism appeal. The documents recommended greater investment in eco-friendly tourism initiatives such as dune restoration, water conservation, and nature-based programming to attract environmentally conscious visitors while safeguarding vital ecosystems.

With many communities nearing full build-out, the lack of available developable land presents a challenge for expanding tourism infrastructure. Municipalities suggested that future development focus on infill and the redevelopment of underutilized areas. This approach would allow for the addition of hotels, restaurants, and other amenities without compromising the distinct character of local communities.



Public access to beaches was another recurring theme. While Palm Beach County is known for its coastline, many municipalities highlighted that public access is limited and represents a missed opportunity. Strategic efforts to acquire land or develop partnerships could help increase access and bolster the county's appeal as a beach destination.

Recreational amenities and open spaces were also recognized as critical to tourism development. Communities expressed strong support for expanding parks, trails, and public waterfronts, noting that these spaces serve both residents and tourists. Such enhancements were seen as essential for promoting outdoor recreation, family-friendly activities, and nature-based tourism.

Cultural and heritage tourism opportunities remain underutilized, according to several municipalities. Many communities possess historic sites, cultural landmarks, and local festivals that could be more fully leveraged to diversify the tourism offering and attract new segments of visitors. Enhancing promotion and integrating these assets into the broader tourism narrative were common recommendations.

Public safety and emergency preparedness were noted as important factors influencing tourism confidence, particularly in a region susceptible to hurricanes and other natural disasters. Municipalities recommended improvements to evacuation routes, emergency communications, and visitor awareness programs to ensure the destination is perceived as safe and resilient.

Zoning regulations were identified in some areas as limiting commercial development necessary for tourism growth. Several plans recommended revisiting zoning ordinances to encourage more flexible and tourism-friendly development, particularly for hotels, entertainment venues, and retail establishments.

Climate resilience and sustainability were central themes in many documents. Municipalities called for stronger planning around sea-level rise, extreme weather, and erosion. Green infrastructure, energy-efficient building practices, and stormwater management were cited as ways to enhance sustainability and appeal to environmentally conscious travelers.

Public-private partnerships (PPPs) were widely viewed as a strategic mechanism for funding large-scale infrastructure projects. Municipalities saw PPPs as a way to deliver essential transportation, public realm, and tourism investments without overburdening local budgets.

Where transit stations exist or are planned, many communities proposed transit-oriented development to support tourism. Mixed-use development near transit hubs was suggested as a way to increase accessibility, reduce reliance on automobiles, and create vibrant areas that combine retail, lodging, and entertainment.

Reducing the seasonal nature of tourism was a shared objective across municipalities. Many recommended developing a robust year-round calendar of events—ranging from cultural festivals to sports competitions—to attract visitors during the slower months and support a more stable local tourism economy.



The shortage of affordable housing and the need for a skilled hospitality workforce were also common concerns. Municipalities advocated for the development of housing near tourism centers and the expansion of training programs to ensure a pipeline of well-prepared workers for the growing tourism sector.

Finally, many communities pointed to opportunities for mixed-use development in downtown areas and commercial corridors. These types of projects, which combine residential, commercial, and recreational uses, were seen as ideal for creating vibrant tourism hubs that also serve community needs.

Notably, CSL was unable to obtain current documents from seven municipalities: Atlantis, Briny Breezes, Cloud Lake, Glen Ridge, Golf, Jupiter Inlet Colony, and Pahokee. Despite this, the review offered a comprehensive cross-section of perspectives and priorities that will inform the direction and focus of the Palm Beach County Tourism Master Plan. Taken together, the findings underscore the need for a holistic, infrastructure-supported, and sustainability-driven approach to growing and diversifying the county's tourism economy.

[Click here for the Existing Documents Review Report.](#)



As part of the foundational work for the Palm Beach County Tourism Master Plan, CSL International reviewed a comprehensive set of research and planning documents provided by the Tourist Development Council (TDC) and its partners, while also conducting its own analysis of the county’s visitor markets, accommodations, attractions, and demographics. This deep dive into both qualitative and quantitative data revealed a series of insights that will directly inform the Tourism Master Plan’s strategies and recommendations.

The review confirmed that Palm Beach County’s cultural sector plays a central role in its tourism economy. Cultural tourism contributes over \$633 million annually and attracts affluent visitors who often stay longer and spend more. Reports such as the Cultural Council Marketing Report and the FY24 Cultural Tourism Plan underscore the importance of leveraging cultural assets while also integrating wellness themes—such as the healing benefits of the arts—to appeal to Millennial and Gen Z audiences. Digital and influencer-driven campaigns were identified as important tools for engaging these younger markets.

Discover the Palm Beaches (DTPB), the destination marketing organization, has outlined strategies centered on brand evolution, sustainability, inclusivity, and collaboration across agencies. The Strategic and Marketing Plans for 2023-2025 emphasize growing the group travel segment, international market penetration, and improving diversity, equity, inclusion, and accessibility. The Convention Center District, in particular, was cited as a growth engine for business tourism, though limited hotel inventory in the area remains a constraint.

One of the most notable concerns across several reports was a decline in visitation among younger demographics and in segments such as LGBTQ+ travelers and beach-seeking visitors. While overall brand awareness remains high, DTPB’s Brand Tracker and Visitor Segments analysis revealed slipping desirability among 18-24-year-olds and lower engagement from previously strong visitor groups. This suggests the need for revitalized offerings and marketing aimed at these segments, along with more inclusive messaging.



Group travel remains a powerful driver of first-time visitation to Palm Beach County, accounting for a disproportionately high share of hotel room nights. Meanwhile, alternative accommodations, such as Airbnb and VRBO, continue to grow in prominence, representing over a million room nights annually. The Tourism Master Plan will need to ensure that future tourism infrastructure supports both traditional and alternative lodging markets to remain competitive.

Sports tourism also presents strong growth potential. The Palm Beach County Sports Commission has outlined a vision to attract more international sporting events, such as Olympic qualifiers and global training camps, while also increasing local and regional tournaments that help drive hotel demand during off-peak seasons. Strategies for growing sports infrastructure, promoting beach sports, and utilizing venues like Wellington’s polo fields will be important to sustaining year-round visitation.

Film and media production have also emerged as a significant economic contributor. Over the past decade, Palm Beach County’s film and television sector has delivered over \$4 billion in impact. Marketing efforts by the Film and Television Commission and the expansion of Palm Beaches TV highlight the opportunity to use creative content—such as influencer series, podcasts, and YouTube webisodes—to cross-promote tourism, enhance storytelling, and engage new audiences.

From a geographic and demographic perspective, tourism and economic activity remain heavily concentrated in the eastern third of the county. Attractions and accommodations tend to cluster near the coastline, though there is interest in expanding westward, especially in areas like Belle Glade and Pahokee that offer untapped potential for eco- and agri-tourism. Demographic and psychographic analyses show a blend of high-income retirees, suburban families, and culturally curious younger travelers—each with distinct needs and preferences that should shape future tourism product development.

Lodging data show that while hotel occupancy has not fully rebounded from COVID-19 disruptions, average daily rates (ADR) have climbed sharply, reaching \$253 in 2023. Despite seasonal lulls in summer, Palm Beach County’s lodging market performs well relative to competitors like Miami and Sarasota in terms of revenue per available room. Alternative accommodations tend to exhibit more consistent occupancy year-round but generate less revenue per stay, pointing to the continued economic importance of hotels and resorts.

Visitation data from Placer.AI reaffirm that the New York metropolitan area remains Palm Beach County’s strongest feeder market, followed by Miami, Orlando, and several northeastern cities. Most visitors stay in eastern cities like West Palm Beach, Boca Raton, Delray Beach, and Riviera Beach, though western areas attract more in-state and local drive market visitors. Smaller municipalities such as Manalapan and Palm Beach Shores generate high per capita visitation, indicating the tourism value of niche and boutique destinations.

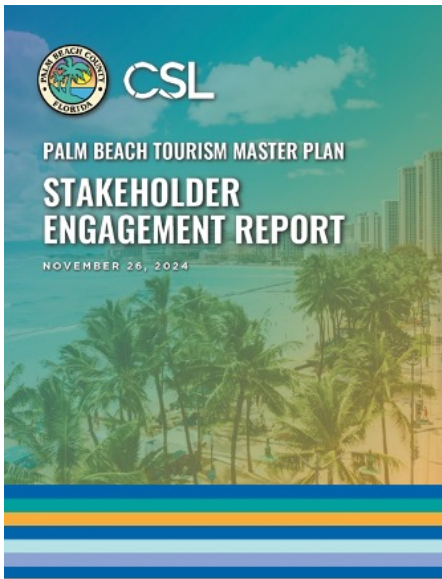


Resident sentiment also plays a critical role in shaping the future of tourism. A countywide survey conducted in 2023 found that 73% of residents view tourism favorably, though new residents and those with disabilities reported more negative sentiment. Residents also expressed support for reinvesting in amenities like beach renourishment and events, while showing less enthusiasm for large public investments in spring training or major venue construction. This signals the need for the Tourism Master Plan to develop consensus-driven strategies that balance public investment with broad community support.

Finally, CSL's analysis of lodging and attractions inventories, visitor psychographics, and demographic trends point to clear opportunities for targeted development. These include investing in iconic festivals, exploring ambassador programs, and aligning with statewide Visit Florida campaigns that emphasize family travel, sustainability, and experience-based tourism.

In short, Palm Beach County possesses a diverse tourism economy with high-value segments and strong brand equity. However, challenges related to seasonality, demographic shifts, inclusivity, and geographic imbalance must be addressed through innovative, community-supported strategies. The Tourism Master Plan will play a vital role in organizing these opportunities into a cohesive roadmap for the county's future.

[Click here for the Tourism Research Review Report.](#)



Between October 1 and October 15, 2024, CSL International conducted stakeholder engagement sessions across six in-person locations and online, gathering perspectives from over 180 individuals involved in or impacted by the tourism industry in Palm Beach County. The insights gathered from these sessions form a critical foundation for shaping a tourism master plan that is inclusive, sustainable, and equitable.

A consistent and urgent theme that emerged from the stakeholder discussions was the concept of overtourism—a relatively new but increasingly relevant issue in Palm Beach County. Stakeholders expressed concerns that tourism growth is beginning to strain public infrastructure, degrade environmental assets, displace local residents, and erode quality of life. These dynamics, while indicative of a successful tourism economy, signal a tipping point that demands strategic intervention.

One of the clearest symptoms of overtourism identified by participants was the strain on transportation and infrastructure. Public transit options are underdeveloped, limiting access to many attractions and increasing traffic congestion, especially near beaches and downtowns. Premium rail services like Brightline are not universally accessible, while parking shortages remain a persistent problem. Stakeholders emphasized the need for alternative mobility solutions such as trolleys, expanded bus service, and improved pedestrian infrastructure to ensure visitor access without overburdening local systems.

The housing crisis was also top-of-mind. Stakeholders described housing affordability and workforce retention as deeply intertwined with tourism's growth. Rising real estate values, driven in part by seasonal residents and the proliferation of short-term rentals, are pushing tourism and arts workers out of the county. Commutes are lengthening, retention is weakening, and the quality of service is suffering as a result. Stakeholders strongly advocated for mixed-use affordable housing developments, public-private housing initiatives, and incentives for workforce accommodations close to tourism hubs.



Environmental concerns were another major area of discussion. Beaches, parks, and nature preserves are facing overuse and degradation, with delayed replenishment efforts and limited investment in sustainable infrastructure. While ecotourism was seen as a promising segment, stakeholders lamented the underdevelopment of visitor amenities and marketing to fully realize its potential. A more robust system of trail linkages, eco-lodges, and interpretive experiences—backed by environmental stewardship—was proposed as a means of elevating the county’s green tourism offerings.

Stakeholders also pointed to the growing imbalance in tourism development across the county. Coastal cities such as West Palm Beach and Boca Raton enjoy robust tourism infrastructure and brand recognition, while inland and western communities—particularly Belle Glade and Pahokee—remain largely disconnected from the tourism economy. Participants emphasized the need for targeted investment, marketing, and infrastructure in these areas to support ecotourism, agritourism, and cultural tourism, and to distribute the benefits of tourism more equitably.

Beyond spatial disparities, stakeholders noted a disconnect between tourism and cultural institutions, even as Palm Beach County is widely regarded as Florida’s cultural capital. Arts organizations often operate independently from the tourism ecosystem, limiting their visibility and impact. Stakeholders called for better coordination between the arts and tourism sectors, including integrated marketing, tourism-focused cultural programming, and more robust funding streams for arts organizations—especially in light of recent state budget cuts.

The discussions also revealed a desire for greater integration of sustainability and community first principles into tourism planning. Stakeholders expressed concern that unchecked development, gentrification, and environmental degradation could undermine the very qualities that make the county attractive. They called for inclusive tourism strategies that elevate minority-owned businesses, showcase cultural diversity, and ensure that long-standing residents are not displaced by rising costs. Sustainability, they argued, must be both environmental and social.

Other challenges cited include trail system fragmentation, limited promotion of ecotourism assets like the Everglades and Loxahatchee River, and contractual restrictions limiting the local reach of the Palm Beach County Film and Television Commission, which stakeholders believe is a missed opportunity to engage residents in the tourism economy.

Despite these concerns, the stakeholder sessions also illuminated a wide range of opportunities. Participants saw major potential in expanding the Palm Beach County Convention Center and building a second headquarters hotel to attract larger events. They advocated for the development of a fully integrated Convention Center District that is walkable and supported by retail and dining options.



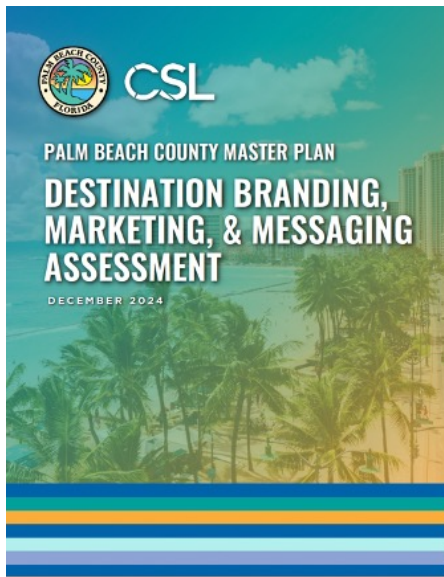
Stakeholders also saw untapped promise in cultural tourism, recommending more programming, artist support, and public art investments across the county. A regional approach to trail connectivity was proposed to boost outdoor tourism, especially among cyclists and hikers. The western communities, in particular, were identified as fertile ground for agritourism and adventure tourism, but in need of accommodations and basic visitor infrastructure to succeed.

Sports tourism also remains a strong and expanding sector, with demand growing for both traditional and emerging events. Stakeholders suggested further leveraging major events in golf, equestrian sports, and baseball, while also investing in indoor sports venues to attract year-round tournaments. Similarly, urban development projects, especially in downtown West Palm Beach and along the waterfront, were seen as key opportunities to create vibrant, pedestrian-oriented tourism districts.

Finally, stakeholders urged the creation of a more cohesive and dynamic branding and marketing strategy that reflects the county's diversity and versatility. They emphasized the need to align and integrate the messaging of the county's 39 municipalities, from luxurious beach towns to rural farming communities, into a unified brand narrative that celebrates culture, sustainability, and inclusivity.

In summary, the stakeholder engagement process revealed both the promise and perils of tourism in Palm Beach County. The county's growth trajectory offers immense opportunity, but without careful management, it risks replicating the mistakes of other overtouristed destinations. The Tourism Master Plan, therefore, must provide a roadmap for sustainable, inclusive, and balanced growth—one that aligns infrastructure, housing, environment, and community well-being with a thriving visitor economy.

[Click here for the Stakeholder Engagement Report.](#)



Palm Beach County is at a pivotal moment in its destination branding journey. With a rich legacy of hospitality, cultural depth, and natural beauty, the county is well-positioned to reinforce its identity as a premier travel destination. However, to remain competitive in a rapidly evolving tourism landscape, the county’s branding, marketing, and messaging strategies must evolve with both market expectations and traveler preferences. This assessment provides a roadmap for unifying and modernizing the county’s tourism brand and strengthening its marketing systems across all agencies.

At the core of the report is a call to develop a cohesive, unified tourism brand identity across all partner agencies under the TDC umbrella. While “The Palm Beaches” remains the recommended parent brand, agencies should adopt a sibling-brand structure that celebrates local distinctiveness while maintaining visual and messaging consistency. A refreshed brand mark—potentially evolving the current “Palmscape” logo to reflect solid, digital-friendly design principles—is advised to better align with luxury expectations and contemporary aesthetics. In parallel, a unified tourism vision and complementary agency missions should be adopted to ensure cross-agency alignment and accountability.

The current branding archetype, which leans toward traditional luxury, is seen as outdated. The report recommends shifting toward an “Explorer” brand archetype—one that emphasizes personal growth, cultural authenticity, sustainability, and meaningful experiences. This repositioning would resonate more deeply with today’s travelers, especially Millennials, Gen Z, and aspirational visitors seeking immersive and ethical travel.

From a marketing standpoint, the report identifies several opportunities and areas for improvement. Immediate enhancements to website SEO and digital presence are advised to address technical issues like missing metadata, broken links, and underutilized keywords. Over the longer term, a unified web platform for all TDC agencies would streamline content delivery, improve user experience, and reinforce brand consistency across platforms.



The marketing strategy must also evolve to reflect shifting visitor values. Campaigns should focus on high-impact themes such as cultural tourism, eco-tourism, family travel, accessibility, and culinary experiences. New dedicated marketing roles are recommended to lead these thematic areas, supported by clear budgets, deliverables, and KPIs. Additionally, resident engagement should become a core strategy. Featuring locals as influencers, subject-matter experts, and ambassadors can humanize the brand while improving community support for tourism development.

Audience targeting is also a major focus of the assessment. The report advocates for an integrated psychographic and demographic segmentation model, aligned across agencies. Shared traveler personas should be developed to guide messaging, media buys, and campaign strategy. Coordination between agencies should be formalized through a cross-agency campaign planning committee responsible for shared themes, consistent timing, and resource pooling.

To maximize return on investment and reduce fragmentation, the report suggests designating a single agency of record (AOR) to manage brand creative and advertising for all TDC partner agencies. This would ensure campaign consistency, unify messaging, and create operational efficiencies. It would also enable smarter, more cohesive media buying strategies and reinforce brand discipline.

In terms of distribution and reach, the county should look beyond traditional OTAs and build partnerships with non-traditional travel agents and niche platforms, particularly those attuned to sustainability, adventure travel, and younger markets. Collaborating with up-and-coming premium brands and lifestyle companies could create more authentic, tailored experiences that resonate with high-value travelers.

The report also emphasizes the importance of clear goal-setting and shared KPIs across agencies, allowing each organization to contribute uniquely to overarching tourism goals. Metrics must be realistic and tailored to each agency's function, capacity, and sphere of influence to maintain accountability without overextension.

Finally, this branding and marketing assessment is not merely about promotional tactics. It is a call to reframe how Palm Beach County presents itself to the world—not just as a place of luxury, but as a destination that embodies diversity, sustainability, wellness, and meaningful connection. The recommendations are designed to empower the county and its partners to move boldly and cohesively into the future, presenting a vibrant, inclusive, and forward-looking brand that can adapt with evolving global travel trends.

By adopting these strategies, Palm Beach County can solidify its reputation as one of the world's most desirable destinations—while also delivering broader community benefits and ensuring long-term tourism resilience.

[Click here for the Destination Branding, Marketing, & Messaging Assessment Report.](#)



The Palm Beach County Community First Assessment Report represents a comprehensive evaluation of how diversity, equity, inclusion, and accessibility are reflected within the county’s tourism ecosystem. The report, built on extensive stakeholder interviews and organizational assessments, reveals both commendable progress and significant opportunities for improvement. It frames Community First not only as a moral obligation but also as a strategic driver for enhancing the county’s tourism appeal, resilience, and competitiveness.

Stakeholders across the public and private sectors affirmed a growing commitment to Community First. Many organizations have made visible strides in integrating diverse voices into marketing materials, leadership roles, and cultural programming. Palm Beach County’s cultural richness—rooted in its Indigenous heritage, immigrant communities, and artistic vibrancy—was identified as a major tourism asset. Collaborative efforts with minority-owned businesses, local advocacy groups, and cultural institutions further reflect an emerging ecosystem of inclusive engagement.

Yet the assessment also surfaced important challenges. Accessibility gaps remain a significant concern, with many venues lacking accommodations for people with disabilities or neurodivergent visitors. Information on accessible options is often scattered or incomplete, and infrastructure investments to support inclusive travel experiences are inconsistent. Stakeholders also raised concerns about perceptions of exclusivity in certain parts of the county, where some attractions are viewed as unwelcoming or geared toward a narrow demographic, limiting the destination’s broader appeal.

Smaller cultural and nonprofit organizations—often the most connected to underserved populations—face resource constraints that prevent them from scaling Community First initiatives. These constraints are compounded by limited funding, legislative restrictions, and staffing limitations, all of which inhibit progress toward a more inclusive tourism environment.



In response to these challenges, stakeholders identified several high-impact opportunities. Foremost among them is the creation of a comprehensive, county-wide accessibility guide. This resource would feature inclusive venues, sensory-friendly attractions, adaptive recreation options, and multilingual services, empowering all travelers to navigate the destination with confidence. Complementing this is a push for more inclusive marketing, with campaigns that authentically reflect the diversity of Palm Beach County—featuring Indigenous stories, immigrant-owned businesses, LGBTQ+ representation, and more.

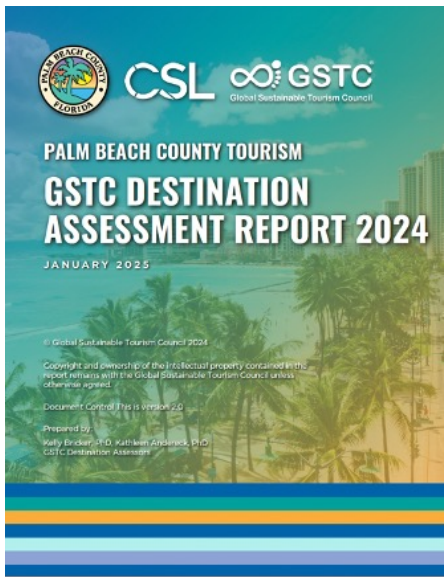
Another central theme was the need for collaborative engagement and cross-sector partnerships. Stakeholders recommended establishing an advisory council with representatives from historically excluded communities, as well as formal partnerships with advocacy groups serving LGBTQ+, disability, and racial/ethnic minority populations. These alliances would serve to align priorities, share best practices, and co-create inclusive programming.

Organizational assessments provided additional insight into current Community First practices and aspirations across the county. Some institutions—such as the Loggerhead Marinelifelife Center and Cox Science Center—have set the bar by offering sensory-friendly and accessible programming. Others, like the Office of Equal Business Opportunity and local museums, are proactively tracking Community First metrics or showcasing diverse cultural narratives. However, these examples are not yet widespread. There is a pressing need to scale these practices through training, measurable goals, and countywide accountability systems.

Recommendations also include the establishment of data-driven performance measurement, such as an annual Community First report card. This would allow stakeholders to evaluate progress transparently, adjust strategies based on feedback, and ensure continuous improvement. Clear benchmarks, visitor feedback loops, and public reporting would serve to institutionalize Community First across the tourism sector.

In conclusion, this assessment paints a nuanced picture of a destination in transition—one that has begun meaningful Community First work but must move more intentionally and collectively to embed these principles across all facets of tourism. By creating an inclusive branding narrative, strengthening access and representation, supporting grassroots organizations, and building shared accountability, Palm Beach County can evolve into a national model for inclusive tourism. These efforts will not only enhance equity and belonging for all residents and visitors, but also drive stronger economic performance, community resilience, and destination loyalty over time.

[Click here for the Community First Assessment Report.](#)



The Global Sustainable Tourism Council (GSTC) conducted an independent evaluation of Palm Beach County’s tourism management practices through the lens of sustainability. Using the internationally recognized GSTC Destination Criteria, the assessment examined the county’s performance across four key pillars: Sustainable Management, Socio-economic Sustainability, Cultural Sustainability, and Environmental Sustainability. The assessment found that Palm Beach County is performing well in many areas but also faces pressing challenges—particularly in business engagement, environmental management, and equity.

In the area of Sustainable Management, Palm Beach County earned a commendable score of 2.41 out of 3.00. Strong governance frameworks, extensive public engagement, and impactful initiatives like the “Sea to Preserve” campaign demonstrate a commitment to marine and wildlife conservation. Agencies such as the TDC and Discover the Palm Beaches (DTPB) are seen as effective coordinators of tourism planning and stakeholder outreach.

However, sustainability efforts across private enterprises lag behind. Few tourism-related businesses in the county are certified under recognized sustainability standards, and there is a lack of clear strategies or incentives to encourage broader adoption. Additionally, the county’s monitoring and reporting systems remain fragmented, lacking a centralized dashboard that integrates environmental, economic, and cultural performance indicators. Strengthening business engagement and data infrastructure is essential to closing these gaps.

The report also highlighted positive outcomes in Socio-economic Sustainability, with a score of 2.73. Palm Beach County’s tourism sector generates approximately \$10 billion annually and supports more than 85,000 jobs, reflecting strong economic contributions. Community-focused programs, such as the Certified Tourism Ambassador (CTA) initiative, equip residents to enhance visitor experiences and strengthen ties between tourism and local quality of life.

Nevertheless, challenges persist in supporting small businesses and ensuring fair economic distribution. Local entrepreneurs—especially in underserved communities—face limited pathways to benefit from tourism activity. Issues of housing affordability and workforce equity remain unresolved, with tourism-driven pressures inflating living costs and displacing essential workers. Stakeholders emphasized the importance of expanding inclusive workforce development and fostering stronger linkages between tourism and local commerce.



On the Cultural Sustainability front, Palm Beach County scored 2.53. The county has made significant strides in preserving its rich cultural heritage, from historical landmarks to intangible cultural assets. Campaigns like “So Much Culture, So Little Time” and the work of the Cultural Council help showcase this diversity to visitors. Museums and cultural venues have also begun to elevate underrepresented voices.

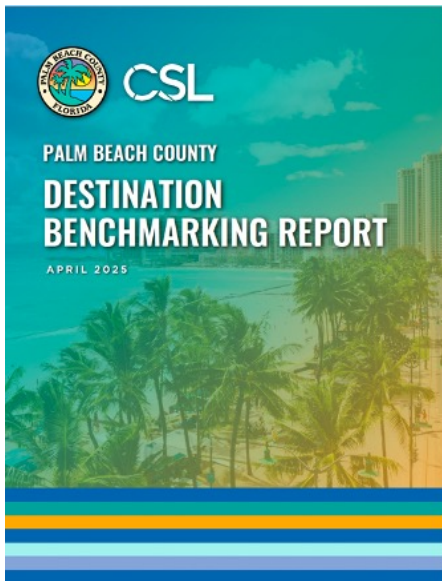
However, the report identified ongoing risks at cultural sites due to visitor overuse and underdeveloped management strategies. Cultural venues often lack interpretive programming or crowd management plans. Furthermore, protections for intellectual property and community-derived heritage are weak, increasing the risk of cultural commodification. By formalizing protections and enhancing site stewardship, the county can ensure that tourism continues to celebrate and preserve its diverse cultural identity.

The most significant challenges were observed in the Environmental Sustainability pillar, which scored a lower 2.09. Conservation successes—such as water quality monitoring and sea turtle protection—show commitment, but critical weaknesses persist. The county lacks a comprehensive system for tracking greenhouse gas emissions, and policies to promote renewable energy or offset tourism’s carbon footprint are underdeveloped. Water use efficiency in tourism zones is poorly managed, and sustainable transportation options like EV infrastructure and bike lanes are sparse.

Ethical wildlife interaction standards also need improvement. Stakeholders raised concerns about inadequate enforcement of animal welfare policies in tourism settings. The report recommends stronger environmental governance, low-impact mobility strategies, and the expansion of climate-conscious practices across the tourism sector.

In conclusion, the GSTC’s assessment paints a picture of a county with a solid foundation in sustainable tourism but with clear areas in need of investment and coordination. Palm Beach County is well-positioned to become a national leader in responsible travel if it strengthens business engagement, centralizes data and monitoring systems, invests in cultural and environmental protections, and prioritizes equitable growth strategies. By embedding sustainability more deeply into every facet of the tourism economy, Palm Beach County can protect its assets, support its communities, and maintain its competitive edge in a future defined by ethical and resilient travel.

[Click here for the GSTC Destination Assessment Report.](#)



The Destination Benchmarking Report provides a comprehensive comparative analysis of Palm Beach County’s tourism positioning relative to a diverse set of domestic and international destinations. The goal of this benchmarking study was to identify Palm Beach County’s competitive strengths and strategic gaps, offering insights to inform the county’s long-term tourism development and marketing strategies.

CSL’s analysis began with a review of Destination DNA—the inherent qualities, assets, and visitor drivers that define Palm Beach County’s tourism identity. The county stands out for its blend of luxury, culture, and natural beauty, offering a year-round coastal experience. Compared to destinations such as Santa Barbara, the Hamptons, and the Gold Coast, Palm Beach County benefits from its accessibility, diversified economy, and scale of offerings. However, it lacks a unifying narrative or “hero product” that encapsulates the destination’s unique value proposition and distinguishes it globally.

A deeper look at asset visitation and destination sales data revealed Palm Beach County’s significant reliance on domestic leisure travelers and group sales tied to conventions and events. While visitation levels are high, especially during peak seasons, the destination faces challenges in shoulder-season performance and mid-week hotel occupancy. Comparatively, destinations such as San Diego and Scottsdale have leveraged major events, sports tourism, and consistent storytelling to fill these gaps.

In terms of storytelling and strategy, the report highlighted that successful destinations craft a clear and aspirational brand promise. For example, Fort Lauderdale has repositioned itself around accessible luxury and arts, while Monterey emphasizes environmental stewardship and scenic beauty. In contrast, Palm Beach County’s brand story remains fragmented, often tied to outdated notions of exclusivity or misaligned with emerging visitor expectations around sustainability, inclusivity, and experiential travel.

Global benchmarks revealed that destinations like Abu Dhabi, the Algarve, and Monaco have made substantial investments in integrated tourism districts, branding strategies, and digital storytelling, helping them attract high-yield international markets. These destinations also prioritize placemaking, creating walkable, mixed-use environments that enhance both resident and visitor experience—something Palm Beach County is only beginning to address in areas like West Palm Beach.



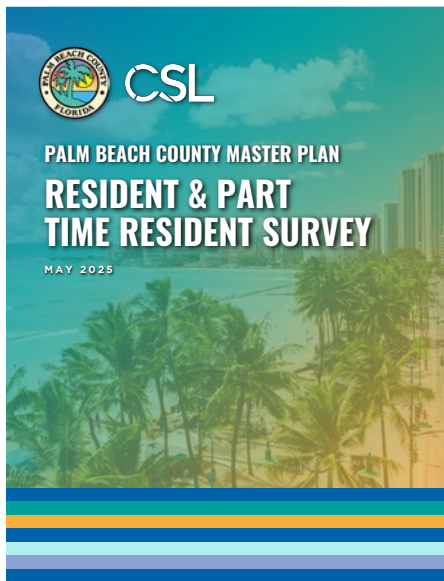
Visitor preference analyses show shifting behaviors across target markets. Younger travelers prioritize authenticity, cultural engagement, and sustainability, while luxury-seeking travelers increasingly seek wellness, privacy, and purpose-driven experiences. Palm Beach County’s current product mix offers pieces of this puzzle but needs cohesive product development and branding to fully activate these segments.

The benchmarking also surfaced destination development opportunities that Palm Beach County could pursue to remain competitive:

- **Developing** a flagship cultural or entertainment district to unify the tourism narrative.
- **Enhancing** trail systems and nature-based experiences to appeal to eco-conscious travelers.
- **Investing** in placemaking and pedestrian-oriented infrastructure, particularly in underdeveloped urban nodes.
- **Expanding** sports and event tourism assets to fill seasonal and mid-week gaps.
- **Creating** stronger cross-agency branding and storytelling platforms that reflect modern traveler values.

In summary, the benchmarking study confirms that Palm Beach County has world-class tourism assets, a strong economic base, and a strategic location. Yet to fully compete with top-tier destinations—both nationally and globally—it must refine its story, strengthen its infrastructure, and create a more cohesive, inclusive, and experiential tourism product. By drawing lessons from peer destinations and aligning its development efforts with traveler expectations, Palm Beach County can chart a bold course for sustained tourism growth and global relevance.

[Click here for the Destination Benchmarking Report](#)



As part of the Palm Beach County Tourism Master Plan process, CSL International conducted a comprehensive survey of over 1,700 full-time and part-time residents to assess their perspectives on the county's tourism-related assets, challenges, and future development opportunities. The findings offer valuable insights into how those who live in or seasonally occupy Palm Beach County perceive tourism's impact on quality of life, infrastructure, and the county's identity as a place to live, work, and visit.

Across both resident groups, there was strong agreement that Palm Beach County's climate, beaches, scenic beauty, and access to outdoor recreation are among its greatest assets. Residents praised the natural environment, waterfront lifestyle, and recreational opportunities as essential to both their personal quality of life and the visitor experience. Cultural venues, dining, and performing arts institutions were also widely appreciated, particularly by full-time residents who engage more deeply with the local arts and entertainment scene.

The most commonly cited challenges by both full-time and part-time residents were traffic congestion, the rising cost of living, and limited access to affordable housing and parking—especially during peak visitor periods. Full-time residents were more concerned with infrastructure strain and economic displacement, while part-time residents focused more on seasonal crowding and transportation bottlenecks. These concerns were echoed in feedback about mobility issues, beach access limitations, and visitor-related pressures on local resources.

Residents generally support tourism and recognize its economic benefits but are wary of unchecked growth. There is a clear desire for more balanced development that protects livability and equitably distributes tourism benefits. Full-time residents, in particular, expressed interest in strengthening civic infrastructure, expanding family-friendly recreation, and managing growth in a way that doesn't overwhelm local systems. Part-time residents emphasized improvements in parking, beachfront amenities, and upscale leisure experiences.

Respondents expressed moderate to strong satisfaction with the county's cultural, recreational, and culinary offerings. Museums, performing arts venues, and cultural events received high marks for quality, though there was some desire—especially among full-time residents—for greater geographic distribution and more diverse programming. Parks, trails, and nature-based attractions were praised by both groups, reinforcing their role as high-value assets that serve both tourists and locals.



Fine dining was consistently rated as a strength across abundance and quality. In contrast, casual and affordable dining received more mixed feedback, with full-time residents more likely to cite gaps in availability or value. Similarly, retail offerings were generally viewed as adequate but lacking in affordability and local character, particularly by full-time residents. Both groups indicated low awareness of farm-to-table or locally sourced cuisine, suggesting an opportunity to better promote culinary experiences rooted in local identity.

Full-time residents tend to be younger, more professionally diverse, and more engaged with civic issues and infrastructure. They value education, health, recreation, and walkability, and are more likely to voice concern over affordability and long-term planning. Part-time residents are more affluent, older, and concentrated in coastal communities. They are more focused on aesthetics, safety, dining, and leisure amenities, and view the county through a more visitor-oriented lens.

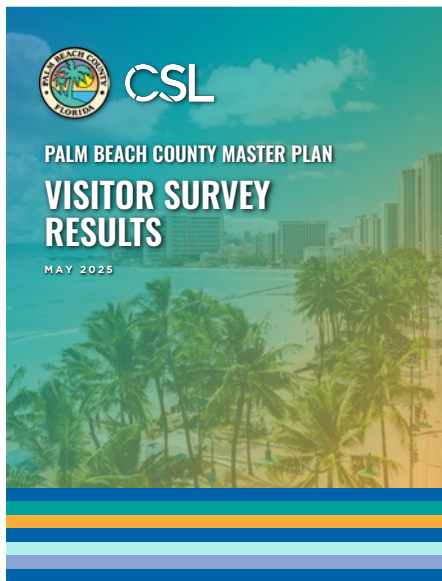
Residents suggested a range of future attractions and enhancements, including:

- **Expanded** parks, trails, and green spaces
- **Improved** beach access and amenities
- **New** cultural and entertainment venues (e.g., amphitheaters, aquariums)
- **Year-round** family-friendly and indoor recreational options
- **Activation** of waterfronts and walkable districts
- **More** vibrant downtowns with accessible retail and public spaces

The survey results underscore the importance of investing in dual-purpose infrastructure—amenities that benefit both residents and visitors. Improvements in mobility, cultural access, recreation, and beach management are seen as essential to maintaining Palm Beach County’s appeal. Residents want tourism to enhance—not compromise—the livability of their communities. There is also an opportunity to engage residents more actively as destination ambassadors, particularly through social media and local storytelling.

In sum, this survey illustrates that Palm Beach County’s tourism strategy must be deeply aligned with the values, needs, and expectations of its residential population. A successful master plan will balance growth with preservation, elevate both quality of life and visitor satisfaction, and ensure that tourism is a shared community asset.

[Click here for the Resident Survey Report.](#)



The Palm Beach County Visitor Survey, conducted by CSL International, captured feedback from over 590 domestic and international visitors. The findings offer a detailed profile of the county’s current visitor base and perceptions, providing important insights to shape strategies for the future of tourism in Palm Beach County.

The survey revealed that Palm Beach County attracts a mature, affluent, and loyal audience, with 75% of respondents aged 55 or older and 44% reporting household incomes above \$100,000. Visitors are predominantly White, 43% are full-time employed professionals and 41% are retired. The majority of travel parties consist of married couples or small families, and most trips are for leisure or to visit friends and family. Encouragingly, over half of visitors are repeat guests, and one-third stay for a week or longer, reflecting strong destination loyalty and alignment with “slow travel” trends.

Visitors’ experiences were overwhelmingly positive. Perceptions of Palm Beach County improved after visitation, with 66% of visitors rating the county as “excellent” following their trip, up from 49% pre-visit. The strongest emotional associations with the destination included words like “beautiful,” “relaxing,” and “fun,” alongside themes of natural beauty, luxury, and leisure.

Palm Beach County’s beaches, climate, dining, and waterfront lifestyle were ranked as both highly important and high quality. Visitors consistently praised the coastal environment, shopping districts (e.g., Worth Avenue, Atlantic Avenue, CityPlace), and attractions like the Flagler Museum, Norton Museum, and Lion Country Safari. Yet they also voiced common frustrations with traffic, parking, affordability, and beach access—issues that diminished convenience and enjoyment.

Repeat visitation could be encouraged by addressing these friction points. Survey respondents indicated they would stay longer or return more frequently if hotel prices were lower, transportation options improved, and more entertainment or cultural events were offered. Many expressed interest in extended programming, nightlife, and family-friendly attractions beyond the beach, and sought enhanced mobility solutions like shuttles and micro transit services.

Social media was identified as an effective communications tool, with 83% of respondents using social platforms during their visit. Many followed destination accounts, engaged with ads, or shared content—highlighting the importance of digital engagement and peer-to-peer storytelling in travel decision-making.



The report also revealed significant differences between resident and visitor priorities. While residents place more importance on colleges, wellness, and community services, visitors prioritize experiential amenities like lodging, dining, and waterfront access. Visitors consistently rated the quality of hotels, restaurants, and nightlife higher than residents, likely due to curated or peak-time usage.

When asked how Palm Beach County could improve, respondents consistently suggested:

- **Easing** traffic congestion and enhancing parking and transit;
- **Making** experiences more affordable, especially for accommodations and dining;
- **Adding** entertainment, events, and nightlife;
- **Improving** beach amenities and public access;
- **Expanding** culinary and cultural offerings that reflect the county's diversity.

In conclusion, this survey confirms that Palm Beach County is perceived as a high-quality, desirable destination—particularly for older, affluent travelers. To remain competitive and broaden its visitor base, the county must address accessibility and affordability challenges while enriching the visitor experience through events, placemaking, and targeted marketing. A tourism strategy that builds on existing strengths, while diversifying and modernizing its offerings, will help sustain Palm Beach County's appeal in a changing travel landscape.

[Click here for the Visitor Survey Report.](#)



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# THANK YOU

JUNE 2025

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