

WORKSHOP

DON'T BE A DOWNER, THEY'RE JUST OUT-OF TOWNERS: A COMPREHENSIVE OVERVIEW OF THE LANDSCAPE OF TOURISM IN THE STATE OF FLORIDA

3:30 - 5:00 PM
FLORIDIAN B

MOVING FLORIDA
FORWARD



REMEMBER TO SIGN-IN

Sign-up sheet is located in back of the room!

RECEIVE YOUR CREDITS FOR
CERTIFIED COUNTY COMMISSIONER



THIS WORKSHOP IS MADE POSSIBLE THROUGH THE SUPPORT OF:



FAC BUSINESS SOLUTION

Economic Crash Course for Florida Tourism

With this segment of the workshop we will walk away with the answers to these following questions:

What are TDTs ?

Why Should You Care ?

Where is this in pictures ?



What are Tourism Development Taxes (TDT)?

First adopted in Ch. 77-209, L.O.F. (HB 2064), as a single one-cent or two-cent tax on transient rentals:

(3) The tourist development tax shall be levied and imposed and set by the governing board of the county at a rate of 1 or 2 percent of each whole and major fraction of each dollar of the total rental charged for such lease or rental. When receipt of consideration is by way of property other than money, the tax shall be levied and imposed on the fair market value of such nonmonetary considerations.



What are Tourism Development Taxes (TDT)?

- **Original TDT:** 1% or 2% tax levied since 1977
- **Additional TDT:** Extra 1% tax allowed since 1986
- **Professional Sports Franchise Facility Tax:** Up to 1% tax for sports facilities since 1988
- **High Tourism Impact Tax:** Extra 1% tax for high tourism impact counties since 1989
- **Additional Professional Sports Franchise Facility Tax:** Another up to 1% tax for sports facilities since 1994



**MOVING FLORIDA
FORWARD**

Why Should We Care about TDT?

- I. Tourism Stimulates all sectors of a local economy**
- II. Offers another alternative to tax collection that does not pertain to Ad valorem taxes**



Why Should We Care about TDT?

Using data from Visit Florida and data related to Sales Tax Collections from FY 2021-22, the Office of Economic and Demographic Research gave the following estimates related to who pays TDTs:

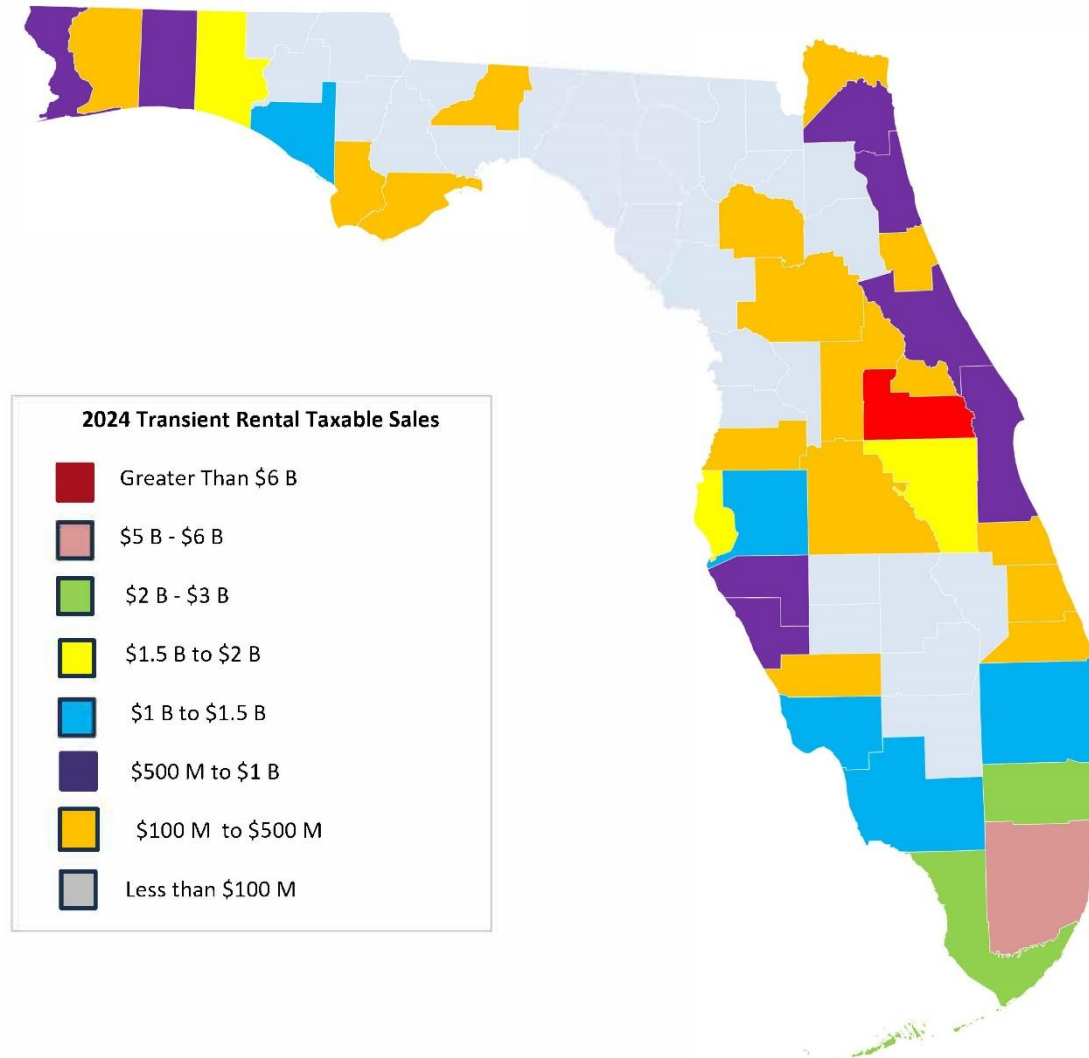
- When combined with international visitors, it is reasonable to assume approximately **21.4% of Taxes on Transient Rentals were paid by Floridians**.
- According to annual reports from DOR,* statewide TDT collections in FY 2021-2022 were \$1,202,280,184; using this estimate, the total TDT paid by **Floridians** in that year was \$257,247,365.

* Local Government Tax Receipts by County, Form 3, FY 2021-22, available at:
<https://floridarevenue.com/DataPortal/Pages/TaxResearch.aspx>



Can you give this to me in Pictures ?

2024 Transient Rental Taxable Sales:

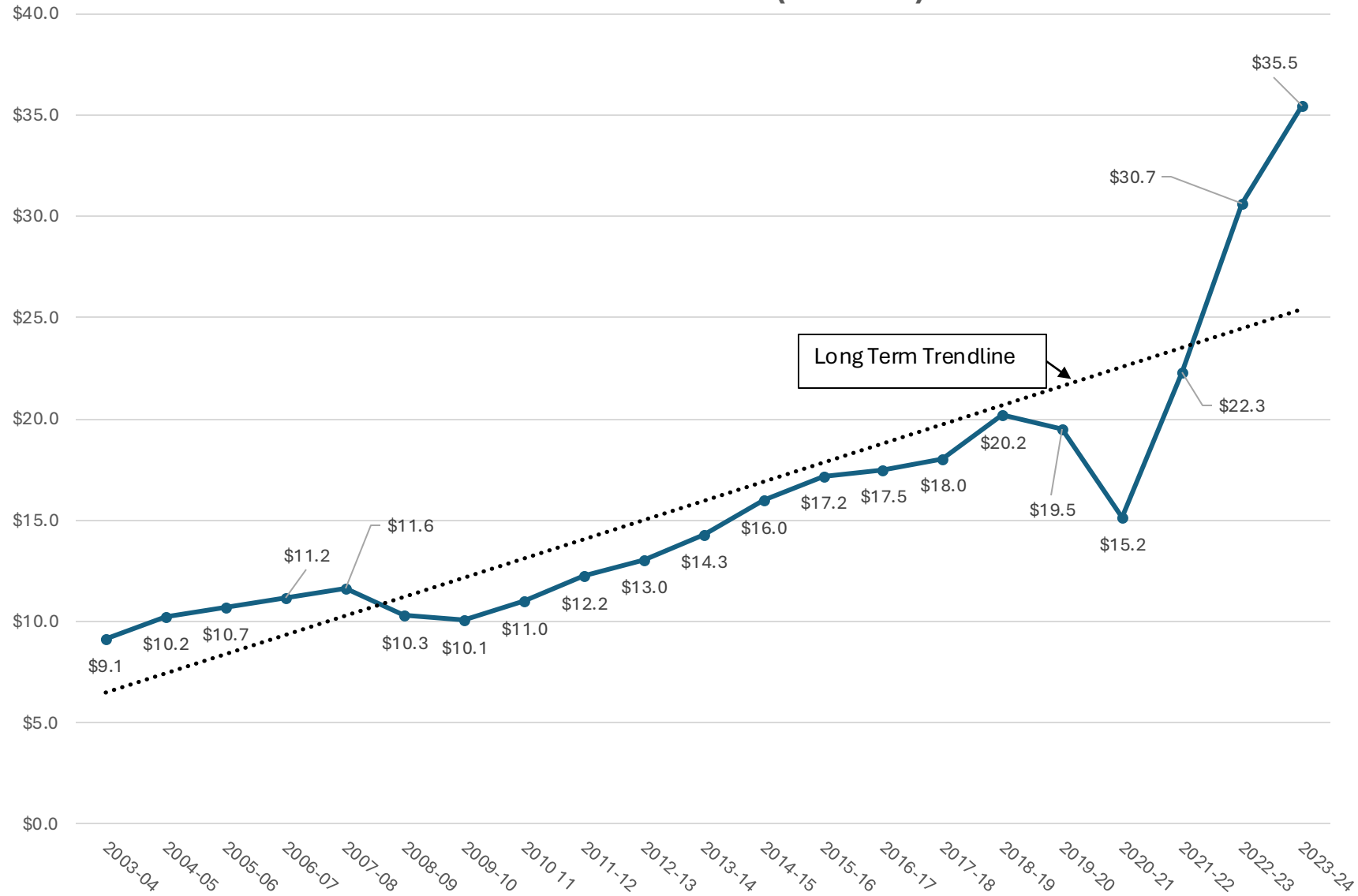


2023-24 Top 20 Counties

Transient Rental Taxable Sales

County Rank	County	2023-24 Transient Rental Taxable Sale	2023-24 Percent of Total Statewide Transient Rentals	Cumulative Percent	County Rank	County	2023-24 Transient Rental Taxable Sale	2023-24 Percent of Total Statewide Transient Rentals	Cumulative Percent
1	Orange	\$ 6,231,489,630	17.5%	17.5%	11	Collier	\$ 1,105,219,565	3.1%	72.9%
2	Miami-Dade	\$ 5,136,544,853	14.5%	32.0%	12	Bay	\$ 1,018,963,601	2.9%	75.8%
3	Broward	\$ 2,360,051,223	6.6%	38.7%	13	Okaloosa	\$ 967,103,024	2.7%	78.5%
4	Monroe	\$ 2,208,877,873	6.2%	44.9%	14	Sarasota	\$ 878,723,415	2.5%	81.0%
5	Pinellas	\$ 1,770,613,788	5.0%	49.9%	15	Manatee	\$ 701,002,102	2.0%	83.0%
6	Osceola	\$ 1,584,424,615	4.5%	54.3%	16	Volusia	\$ 622,006,781	1.8%	84.7%
7	Walton	\$ 1,545,191,700	4.4%	58.7%	17	Duval	\$ 595,776,312	1.7%	86.4%
8	Palm Beach	\$ 1,495,092,459	4.2%	62.9%	18	St. Johns	\$ 581,554,209	1.6%	88.0%
9	Lee	\$ 1,353,192,075	3.8%	66.7%	19	Escambia	\$ 508,163,649	1.4%	89.5%
10	Hillsborough	\$ 1,105,881,397	3.1%	69.8%	20	Brevard	\$ 503,404,829	1.4%	90.9%

Statewide Total Transient Rental Taxable Sales 2003-04 to 2023-24 (Billions)





Economic Crash Course for Florida Tourism

AMIR WARREN

Policy Analyst

(904)-891-3016

Email: Awarren@fl-counties.com



PALM BEACH COUNTY & TOURISM

June 27, 2024

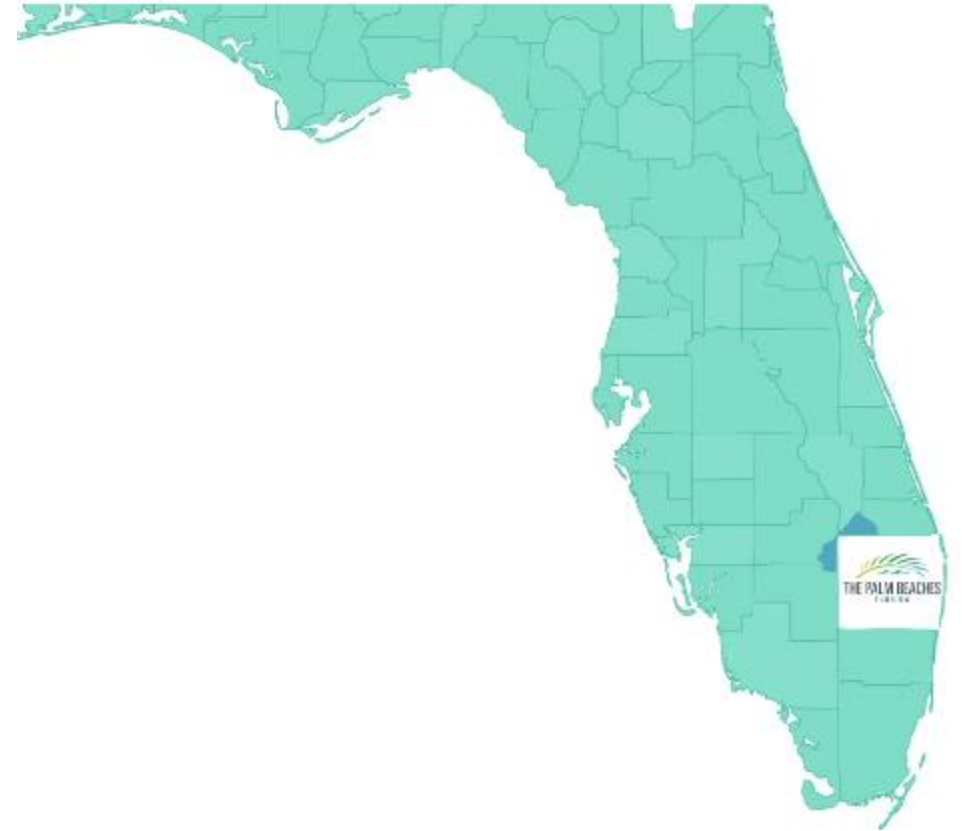




America's First Resort Destination™

The Palm Beaches

Florida's *Most Stylish* Vacation Destination



- WHO WE ARE



- **Discover The Palm Beaches**
 - **Official Tourism Marketing Corporation** contracted by Palm Beach County government
 - Private, **not-for-profit organization** accredited by Destinations International
 - Reports to a **25 Member Board**/7 appointed by Palm Beach County Board of County Commissioners
 - **Tourist Development Council** organization collaborating with sister agencies
 - Funding almost entirely through **bed taxes**, plus some private revenues

WE MARKET. WE SELL. WE CONNECT.

We're more than just tourism marketing, we're an economic development organization.

Working for the people of Palm Beach County



Working for Everyone in The Palm Beaches

Representing and Investing in Our Community

Welcome everyone to
our destination

Safeguard our brand

We are transformative,
apply high standards,
bring new ideas

Sell PBC and its cities to
leisure and business travelers

Work together with our
sister TDC agencies to
improve quality of life

Connect with businesses
and residents everywhere
in our community



We Market. We Sell. We Connect.

BED TAX INVESTMENT/GROWING THE TOURISM ECONOMY



6% NIGHTLY TAX
ON STAYS IN
ACCOMMODATIONS



- | | |
|-----|---------------------------|
| 30% | Discover The Palm Beaches |
| 33% | Tourism Infrastructure |
| 13% | Cultural Council |
| 12% | ERM |
| 5% | Sports Commission |
| 3% | Film & TV Commission |
| 3% | TDC / Special Projects |
| 1% | Tax Collector |

Working for Everyone in The Palm Beaches

Funding Local Tourism Promotion by Tourist Development/Bed Taxes

Provide for beach restoration,
cultural programs, tourism
infrastructure

Majority of funds support
tourism marketing

Changes to future funding
would hurt those working
in tourism

These taxes are not
paid by local residents,
visitors pay them



These Taxes Provide Opportunities for Economic Well-Being



Working for Everyone in The Palm Beaches

Discover The Palm Beaches Oversight and Budget Review

In accordance with PBC
schedule, line-item is
presented for approval

Allowable expenses work
on a reimbursement basis
from PBC



THE PALM BEACHES FLORIDA

Expenses presented in
detail both monthly and
annual for review

All expenses audited by
Tourist Development Council
and PBC Clerk

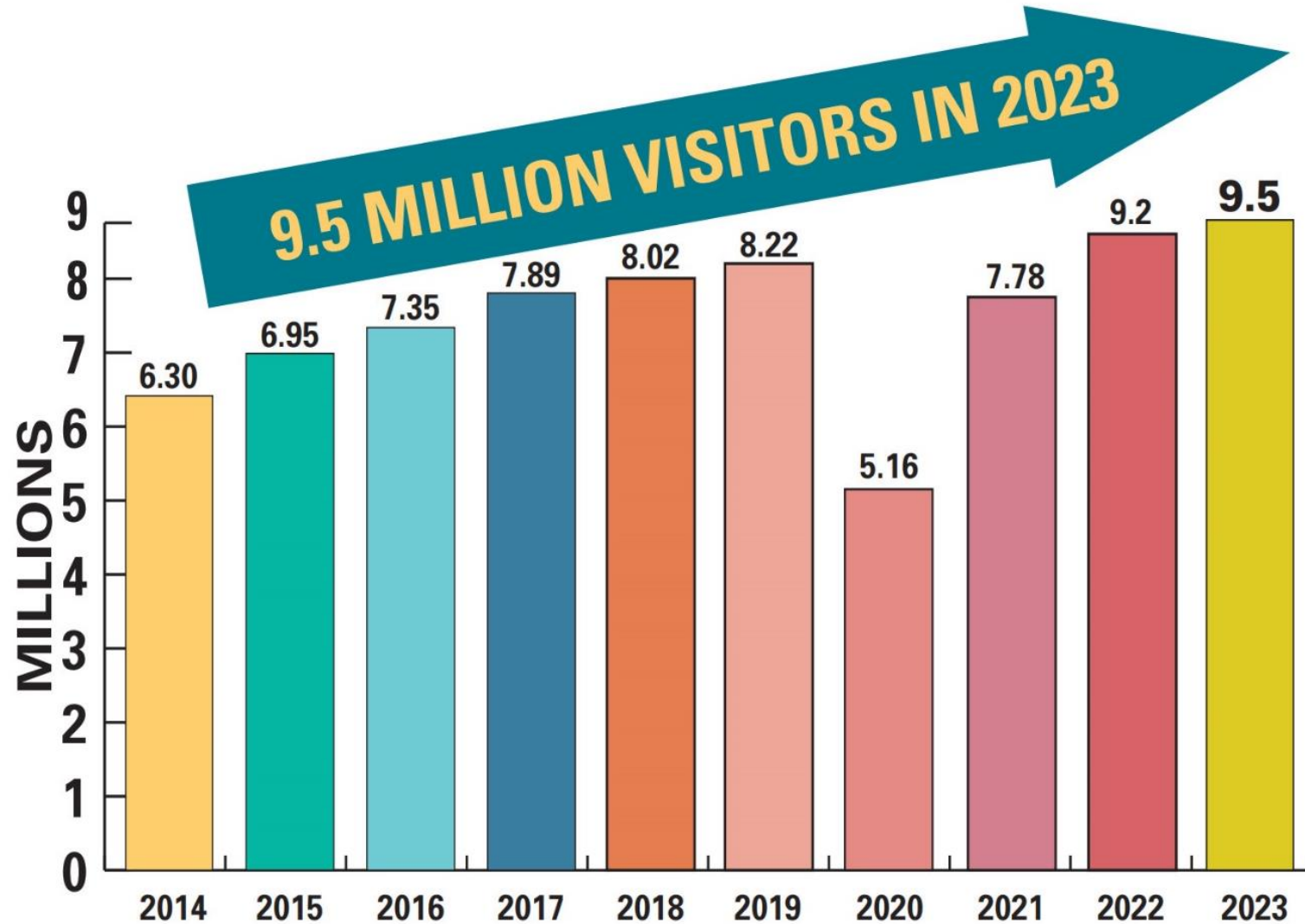
We Are Good Managers of TDT/Bed Taxes, With Strong Supervision

#ThePalmBeaches



ThePalmBeaches.com

BEST YEAR EVER!



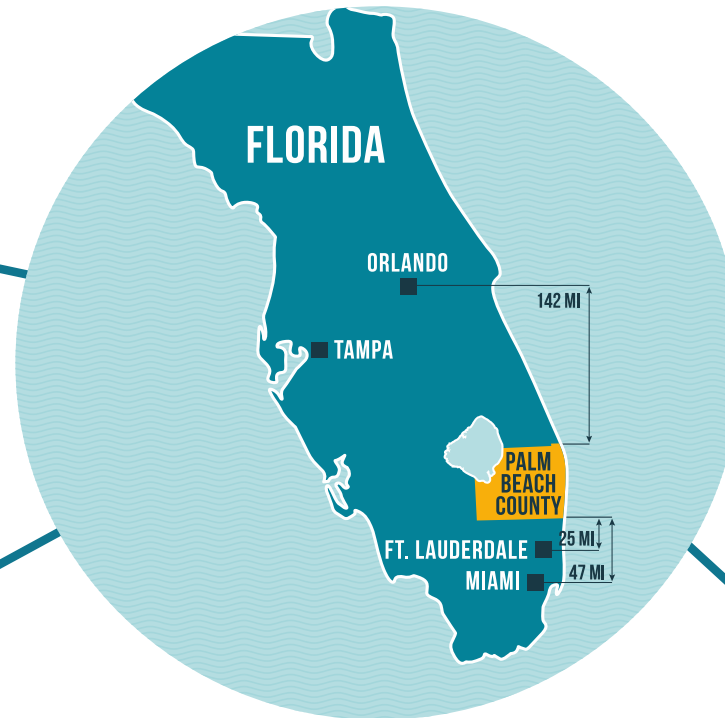
THE POWER OF TOURISM IN **PALM BEACH COUNTY**



TOURISM PROVIDES BUSINESSES AND PEOPLE WITH OPPORTUNITIES



SUPPORTS THE
LIVELIHOODS OF
85,000
HARDWORKING PEOPLE



TOURISTS GENERATES
\$262
MILLION
IN LOCAL TAXES AND FEES



VISITORS GENERATE
\$7.08B
IN DIRECT SPENDING

\$10.3B TOTAL ECONOMIC IMPACT
11% OF PALM BEACH COUNTY'S ECONOMY



4 in 10
RESTAURANTS
1 in 10
RETAILERS
60,000
HOUSEHOLDS
ALL RELY ON TRAVEL

• Research Platform

- **Visitation, Visitor Profiles & Market Segmentation** – Visa Destination Insights, Placer.ai, Omnitrak, Longwoods, MMGY DK Shiflet
- **Visitor Spending & Economic Impact** – Visa Destination Insights, Florida Department of Revenue, IMPLAN, Event Impact Calculator
- **Lodging Performance (Hotels, Vacation Rentals, Airbnb)** – STR, Airdna, PBC Tax Collector, Department of Professional Regulation
- **Resident Sentiment** – DTPB in-house research platform
- **Brand Performance & Traveler Sentiment** – DTPB in-house research platform
- **Destination Demand™** – DTPB Proprietary Platform based on ARC, OTA Insight, Keydata, Airdna, FuturePace, Sport Commissions data

2024 STRATEGIC APPROACH





- Transforming
 - The Palm Beaches
 - Visitors' Experience;
- Integrating *Meaningful*
 - Brand Evolution;
 - With *Revolutionary*
- Marketing Technology

CORE STRATEGIC PILLARS FOR 2024 & 2025

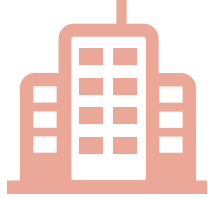


Revenue Optimization

Sales

Marketing

Partnership



Organization & Destination Development

Master Plan

PBCCC HQ Hotel

MarTech

Events

CTA

Talent

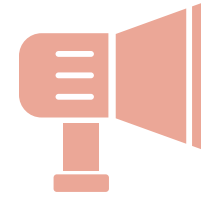


Collaboration

TDC Agencies

Community Stakeholders

Residents



Advocacy

State

County

Cities



Social Inclusion & Sustainability

Diversity, Equity, Inclusion

Accessibility

Environment

Quality of Place

MARKETING TECHNOLOGY

Artificial Intelligence & Digital Platforms



Website | Generative AI | Mobile App | Deep Learning AI

The Palm Beaches Collection

*Boca
Raton*

Boynton
Beach

**Delray
Beach**

Juno Beach

Jupiter

**Lake
Worth
Beach**

**Palm
Beach**

PALM
BEACH
GARDENS

*Pine
Hills
Beach*

TEQUESTA

Wellington

WEST PALM
BEACH





Residents invite friends and family, build awareness of what we do

Social media based, giveaways for locals, summertime

Local leaders have participated and encouraged residents



Invite visitors and residents to see our eco assets

Visitation leads to awareness and preserving

We work with our eco partners and promote protected assets



Working for Everyone in The Palm Beaches

Advocacy Vision

Ensure our presence at
decision-making tables

Educate about what we do,
more than just marketing

Showcase our destination
experiences to local policymakers

Promote an aspiring image of
well-being and prosperity



Win the Crowd!

#ThePalmBeaches



ThePalmBeaches.com



The Palm Beaches Hospitality & Tourism Career Day

The Palm Beaches Hospitality & Tourism Job Fair

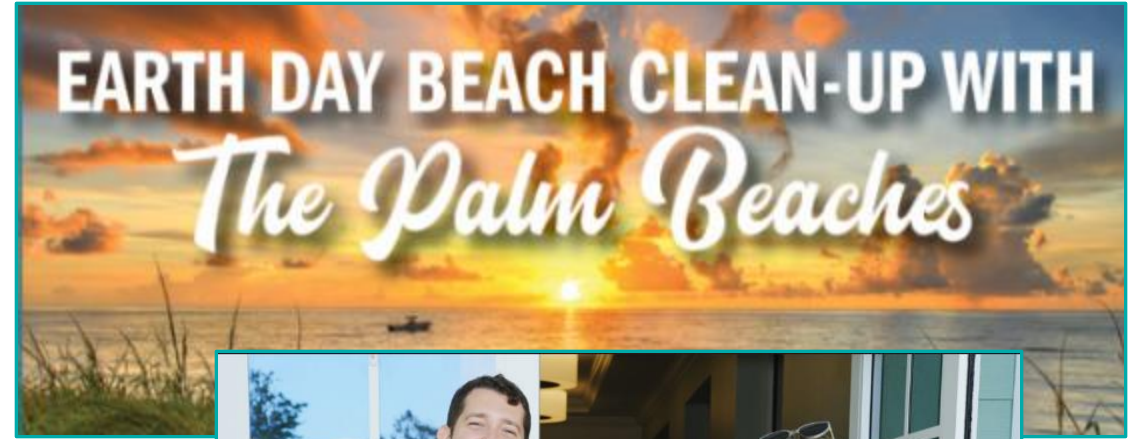


YOU'RE INVITED

TO JOIN DISCOVER THE PALM BEACHES FOR THE 2024

**STATE OF THE TOURISM INDUSTRY:
ASPIRE. TRANSFORM. COLLABORATE.**

EARTH DAY BEACH CLEAN-UP WITH *The Palm Beaches*



TOURISM MASTER PLAN

Framework of plan approved by Board of County Commissioners,
we'll begin with interviews and town halls

What will tourism look like in 10 – 20 years?

How do we prevent overtourism?

How do make sure our residents don't come to despise visitors?

What do we need in tourism infrastructure?

Year to year & half time frame



Image taken from
Apollo 8, Dec. 1968
Astronaut William Anders

Earthrise



It's perspective ... we want to put tourism in
a different perspective

THANK YOU



Increasing your ROI through Partnership with VISIT FLORIDA

VISIT **FLORIDA**[®]



The Power of Florida Tourism



\$121.5 Billion

Added to Florida's Economy in 2022

\$35.2 Billion

in Federal, State and Local Taxes

2 Million

Jobs in Florida Supported by Tourism

\$1,840

Saved by 8.8 million households

\$72.9 Billion

in Wages and Salaries

140

Million
**Visitors in
2023**

VISIT **FLORIDA**[®]



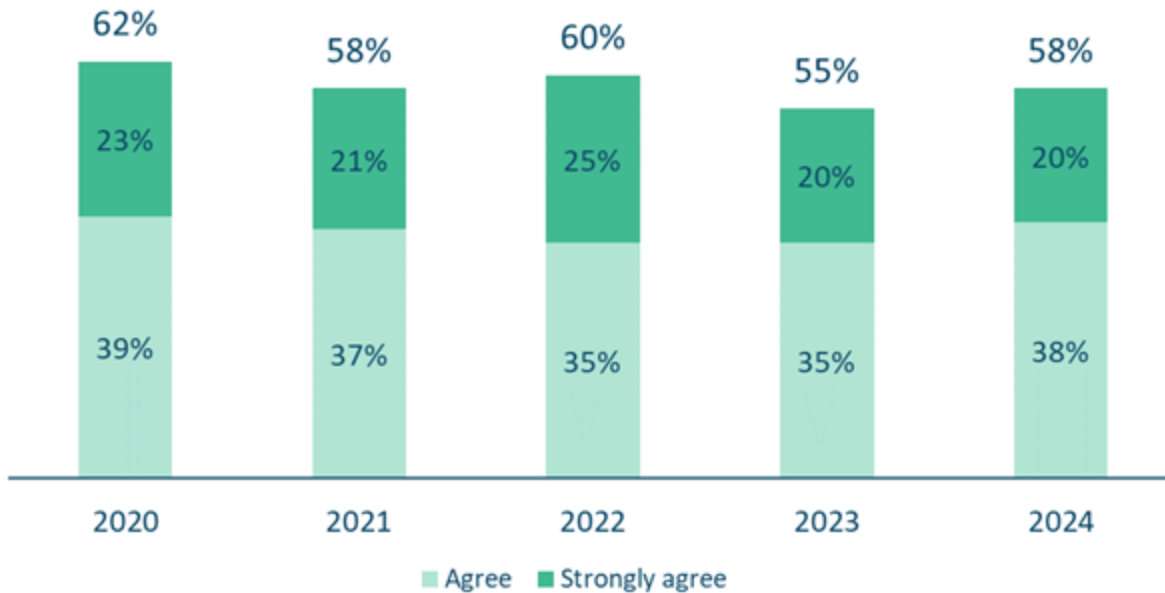
Melbourne Beach

Florida: Beating the Competition

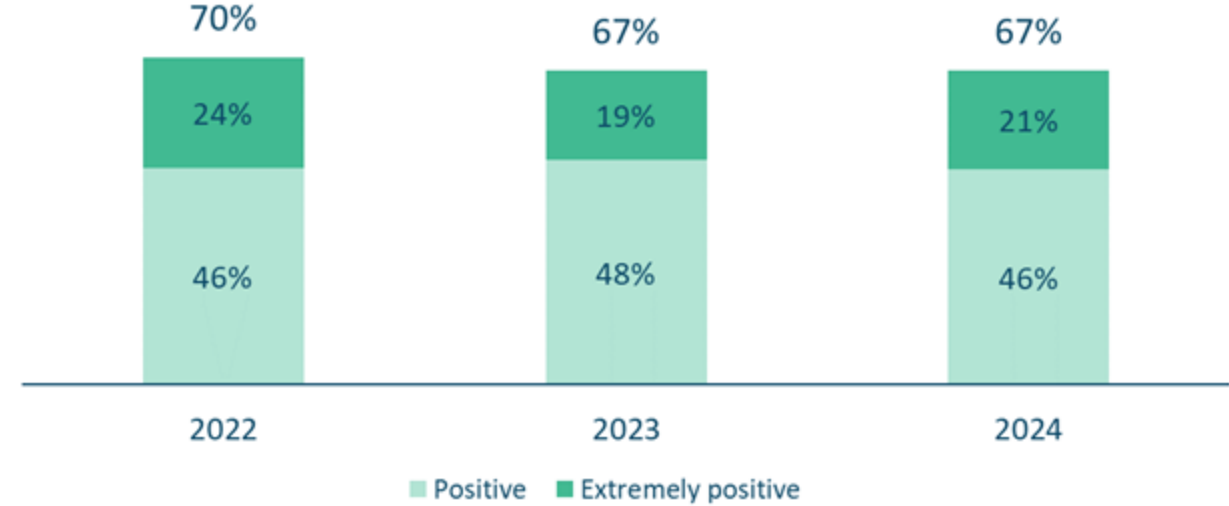


Florida Resident Sentiment Survey

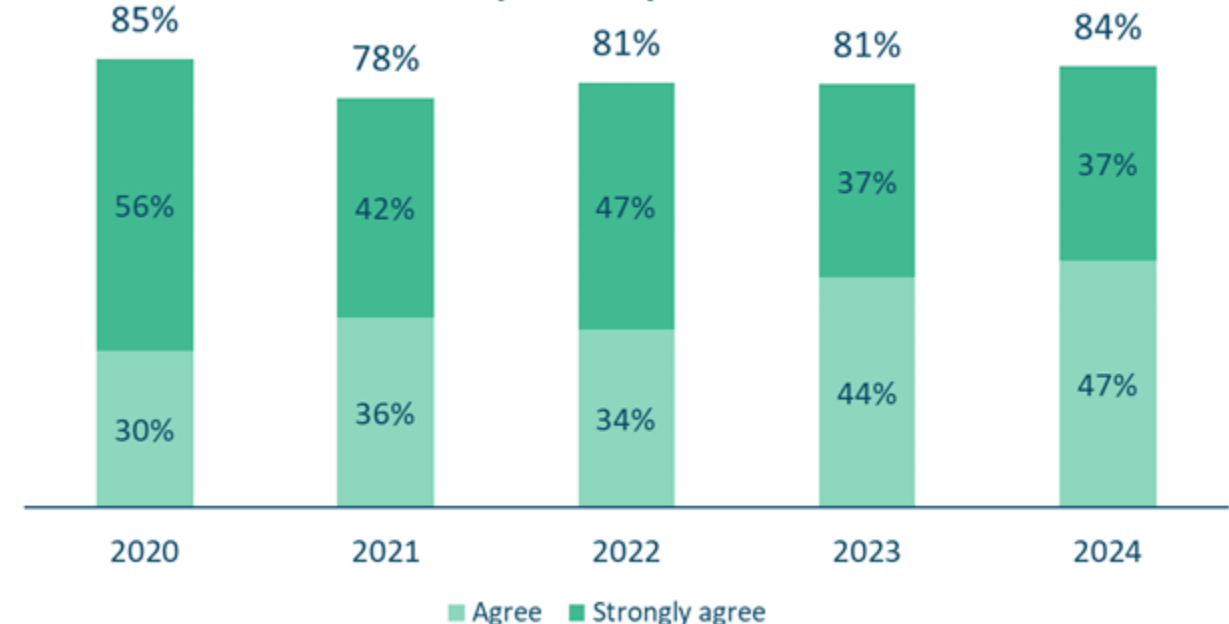
Overall, Florida's tourism industry results in a better quality of life for me and my family



In general, what are your overall perceptions of Florida's tourism industry?

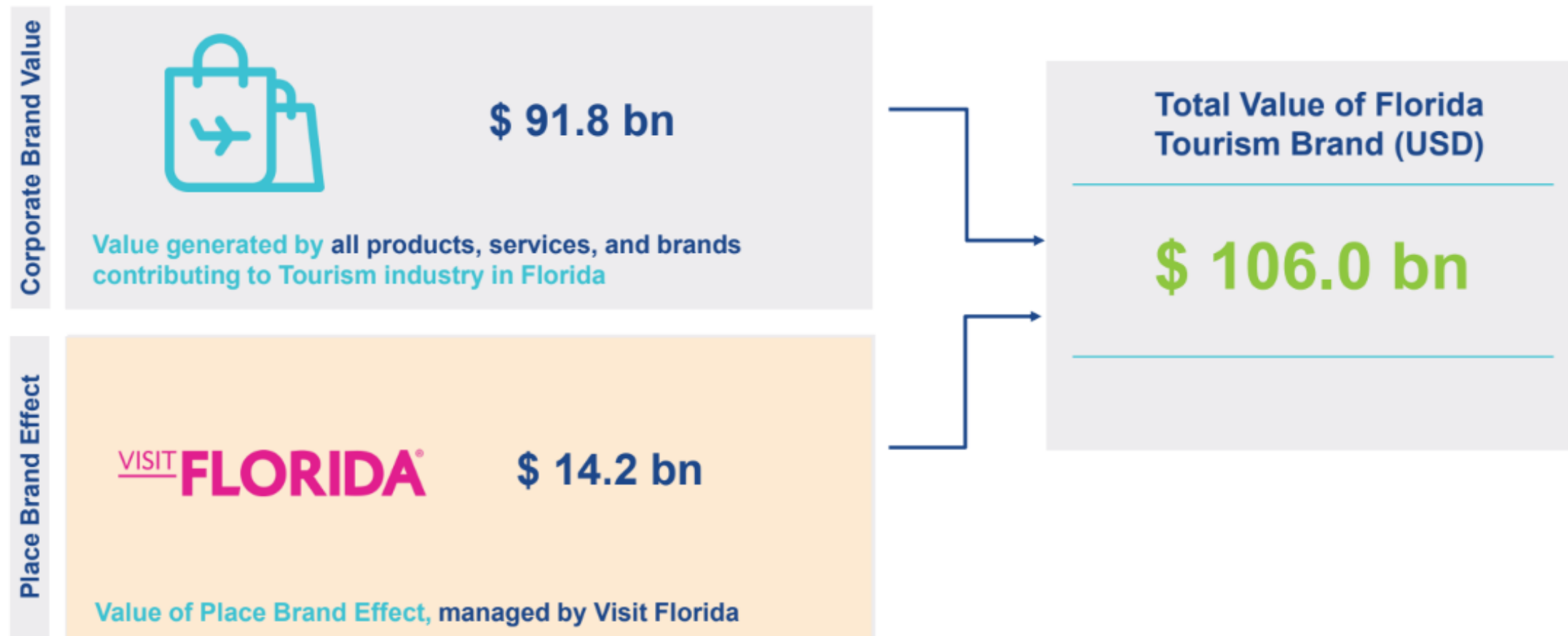


Tourism in an important part of Florida's future



Florida Tourism Brand Value 2021

Place brands generate value through both product brands that operate in the destination and through the place brand itself



Brand Strength Index: Understanding Visit Florida Scores



Brand Strength Index (BSI)

Investment - how much is invested in developing, supporting and promoting the brand?

Equity - how do stakeholders feel about the brand?

Performance – does the brand generate a price or volume premium versus competitors?

In 2021, Florida Tourism had a Brand Strength Index (BSI) Score of 78.8 / 100 (AA+), compared to 80.2 / 100 (AAA-) in 2019.

Brand Strength Distribution in US Brands* (USA 500 2021)



Brand Ratings Definitions		
AAA	80-100	Extremely Strong
AA	65-80	Very Strong
A	50-65	Strong
BBB-B	35-50	Average
CCC-C	20-35	Weak
DDD-D	0-20	Failing

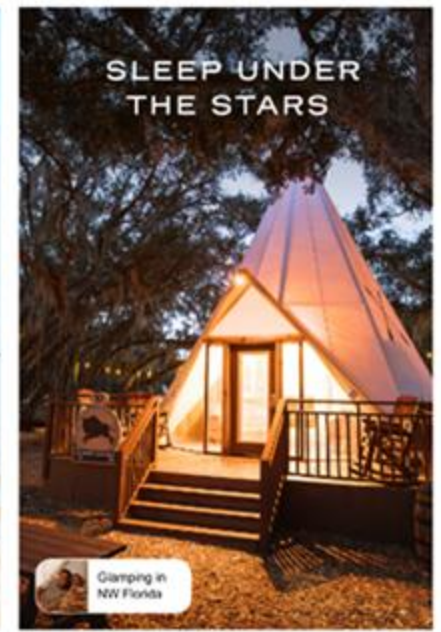
Brand Rating	Relative Score
AAA+	90
AAA	85
AAA-	80
AA+	75
AA	70
AA-	65
A+	60
A	55
A-	50

There is a broad distribution of how strong a brand is, ranging from A to AAA.

- AAA brands are transcendent, and this category is considered to be extremely difficult to get into.
- AA are extremely strong brands within their categories.
- A rated brands are considered to be rising contenders within a sector/country.

Florida: Adventure Travel

- Go Beyond the Expected
- Trails and Trail Towns Campaign
- "Adventure within Reach"



What does Cooperative Marketing with VISIT FLORIDA look like?

- > Turnkey programs offered year around in 4 week flights
- > Leverage buying power to offer highly negotiated rates
- > 25% co-investment from VISIT FLORIDA
- > Packages start at \$3,750
- > Partner-led creative
- > Requires our co-op logo:

IN PARTNERSHIP WITH
VISIT **FLORIDA**[®]

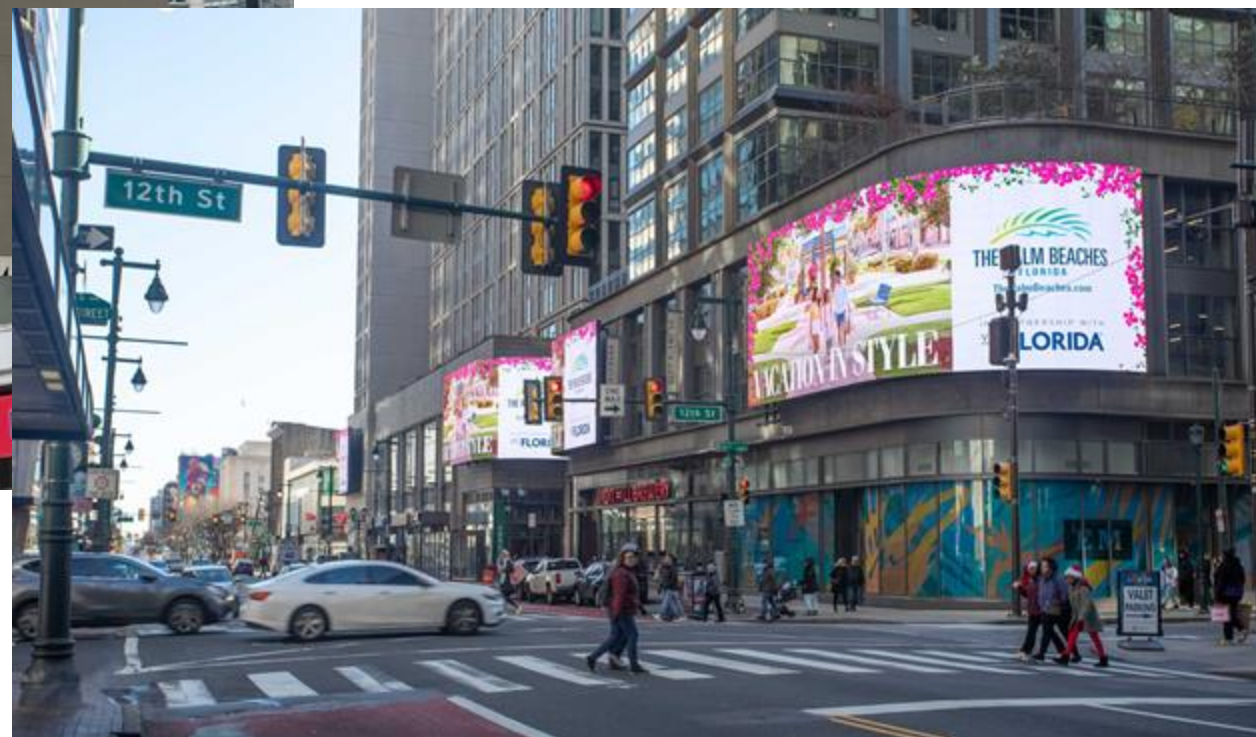
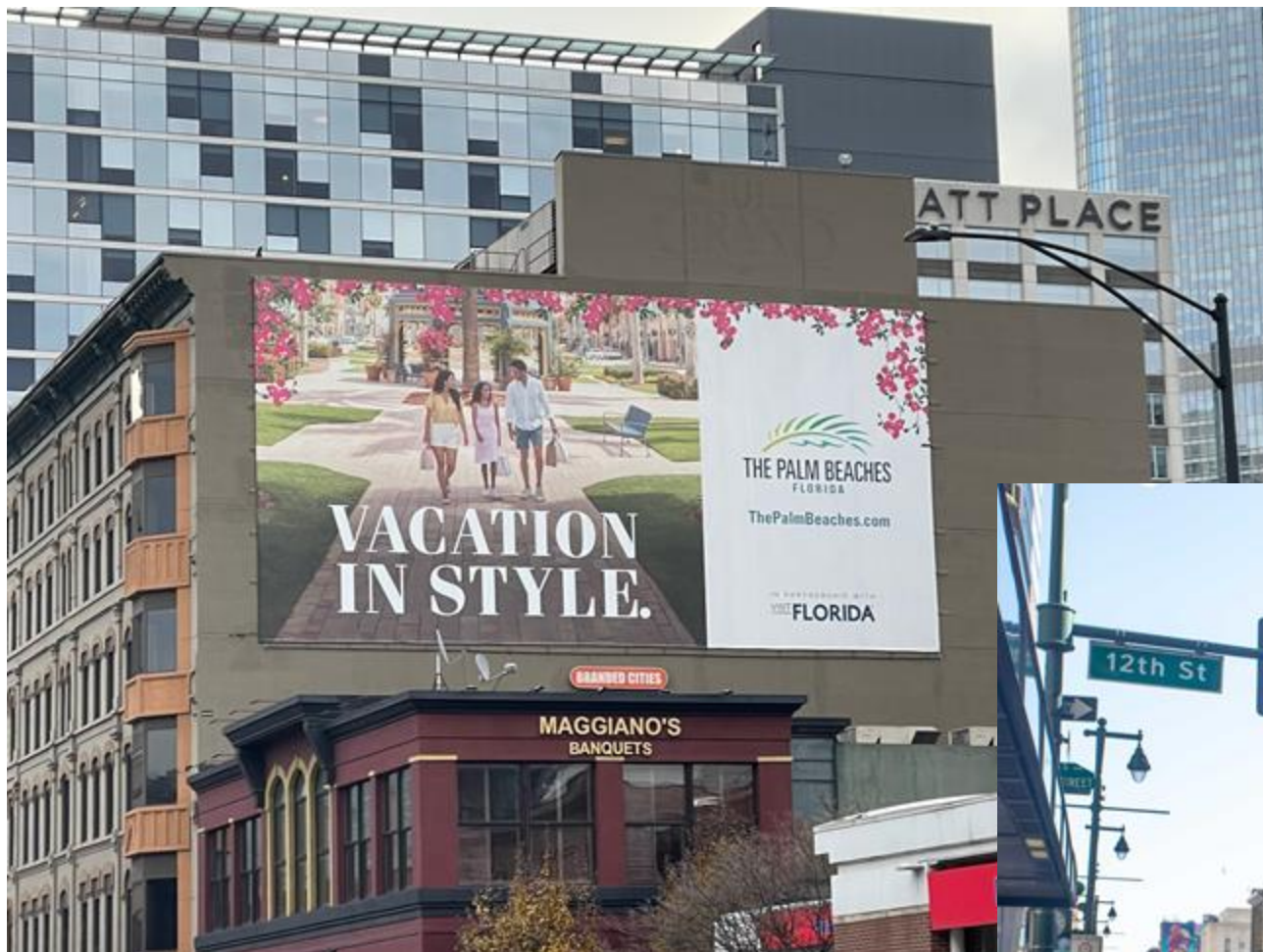
An aerial photograph of a sandy beach. In the upper left, a large, colorful striped beach umbrella is open. Below it, a man in a striped swimsuit and a woman in an orange swimsuit are lying on blue towels. To the right, a group of people are near a yellow and white striped inflatable ring. The word "TAKE" is overlaid in large white letters on the left side of the image.

TAKE





VISIT **FLORIDA**



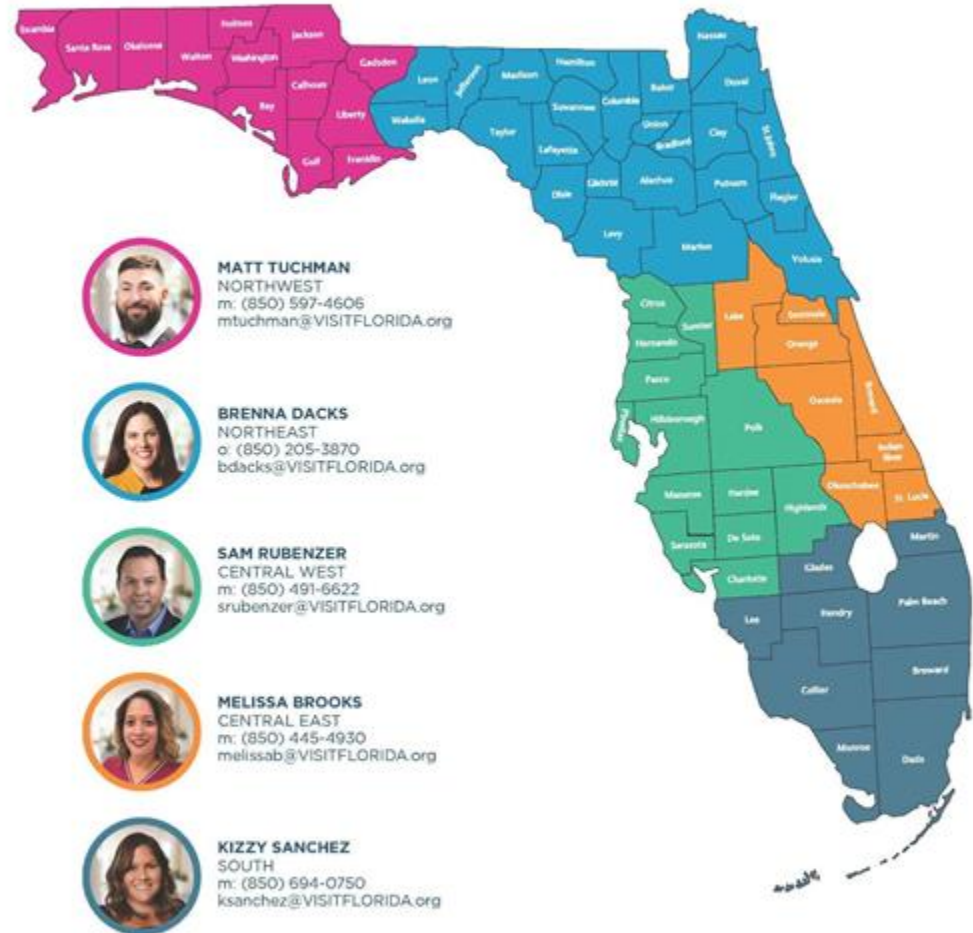


Key Takeaways

- **Communicate with your local DMO**
- **Engage with VISIT FLORIDA**
 - Partnership, Free Web Listing, #LoveFL
- **Participate in Co-op**
 - Turnkey programs that fit every budget

Lindsey Norris
Director of Industry Relations
850-445-8421
Inorris@visitflorida.org
www.visitflorida.org

Regional Partnership Managers



Thank You!

VISIT **FLORIDA**[®]



Ginnie Springs

Winning Big by Promoting Small

John Solomon, Director Franklin County TDC





together



everyone



accomplishes



more



Who is on the Team?

1. The County Commission

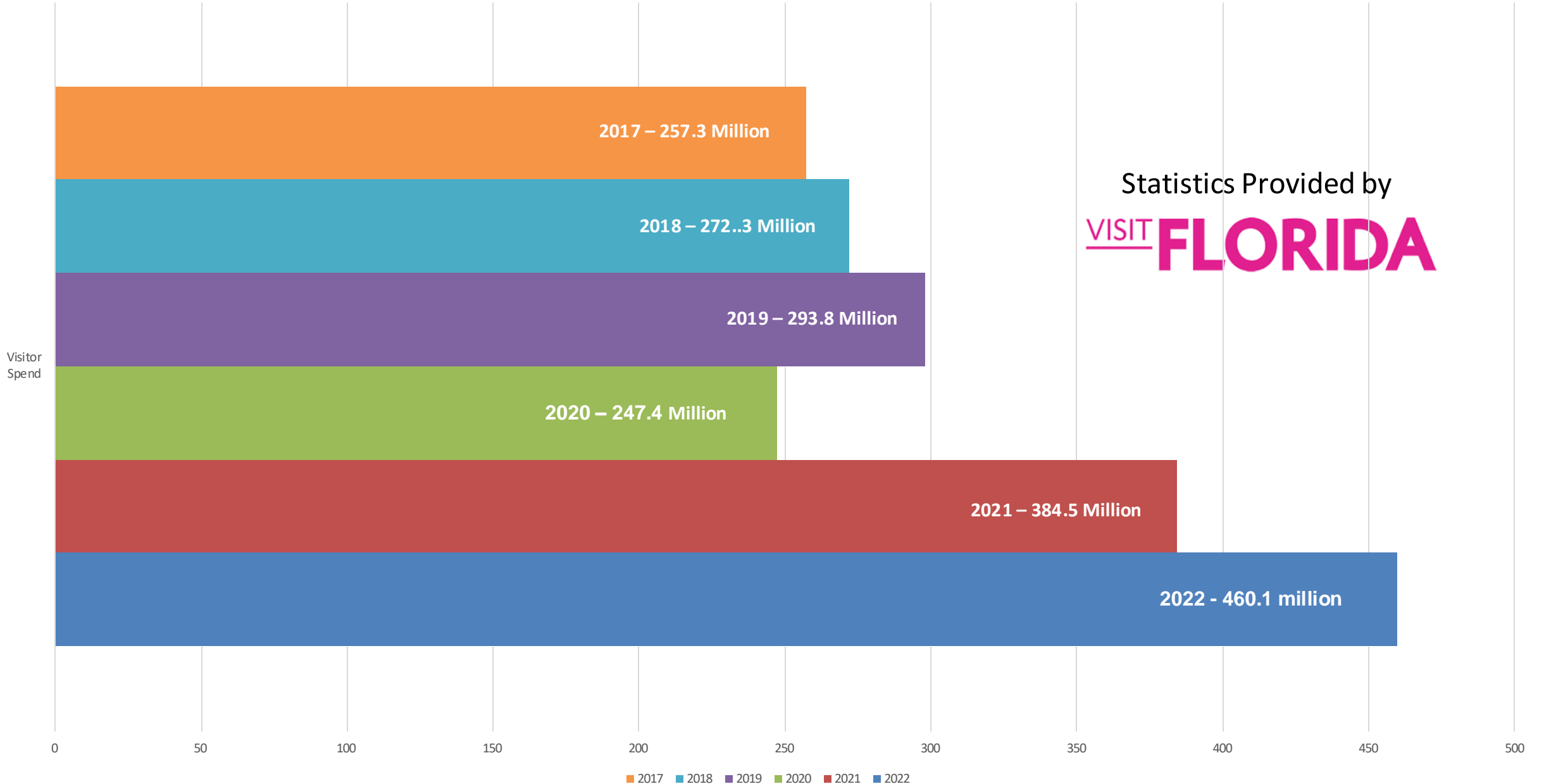
2. Tourism Development Advisory Committee

3. Administration & Vendors

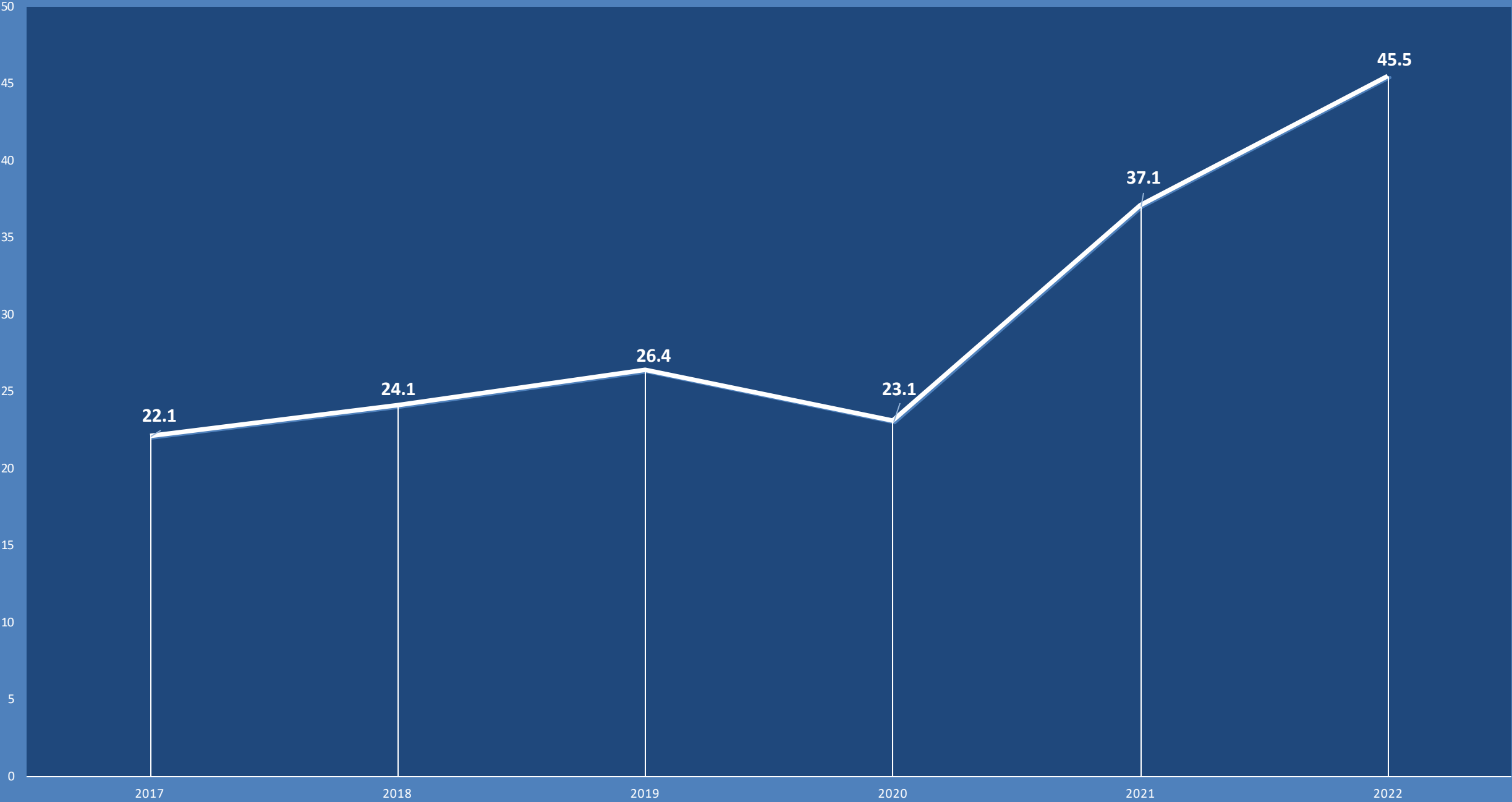
4. Positive Public Input



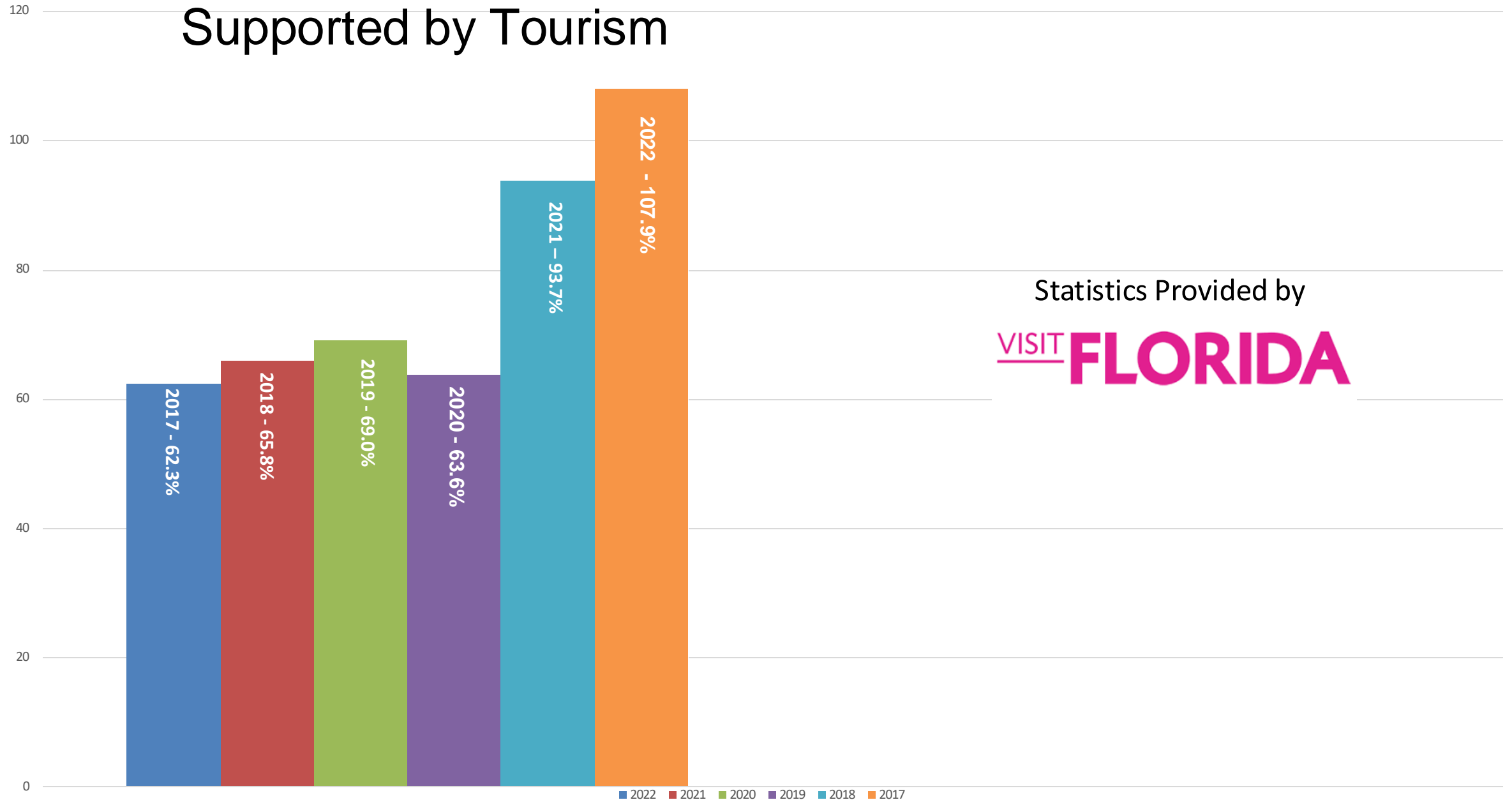
Total Visitor Spending for Franklin County



STATE & LOCAL TAXES COLLECTED FROM TOURISM



Percentage of Jobs Supported by Tourism



Statistics Provided by

VISIT **FLORIDA**

It All starts with a Tourist



The Franklin County TDC creates marketing campaigns to get tourists' attention, leading visitors to book a trip to our community rather than a competing destination.



A visitor checks into a rental property paying a tax on their overnight stay. The tourist may stop by the grocery store, local market, try a local restaurant or stop by local fish market.



Local attractions in Franklin County all experience the economic benefits of this tourist.

Visitors also shop at local boutiques, specialty shops, rent golf carts, book fishing charters, visit museums and play golf. County Sales tax proceeds increase.



The promise of business from tourism inspires entrepreneurs to start their own businesses.

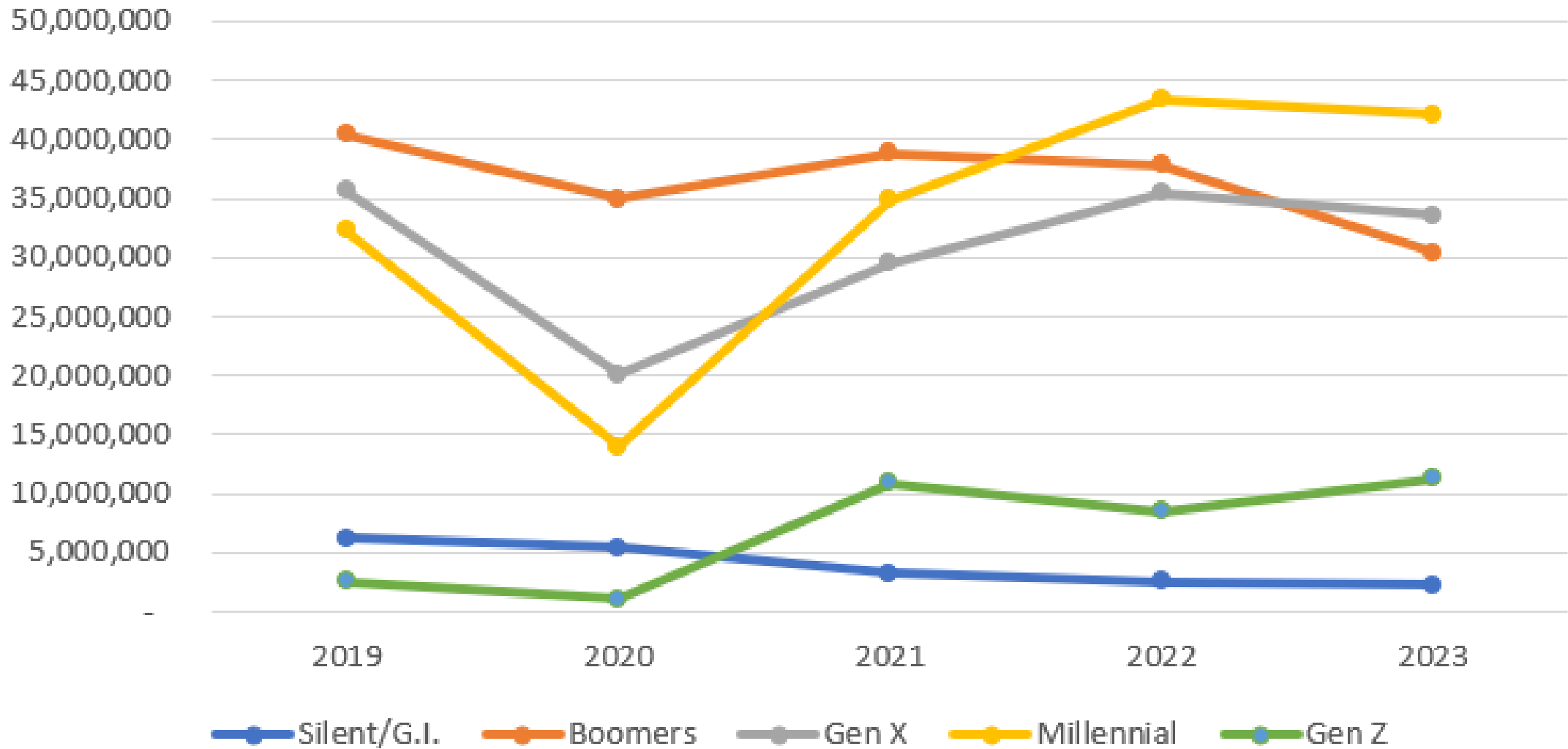
Which spurs economic growth and development and also attracts even more tourists.



Many tourist fall in love with Franklin County and decide to move here.

These new residents pay local taxes, and their family and Friends come to visit bringing even more tourism dollars. This cycle creates new job opportunities for residents, better schools for our children, stronger public safety, improved infrastructure and enhanced quality of life.

Pg. 23 - Domestic Visitor Volume by Generation



Information provided by VISIT FLORIDA

GEN Z – 9.2%

G.I. – 1.9%

Boomer – 25.4%

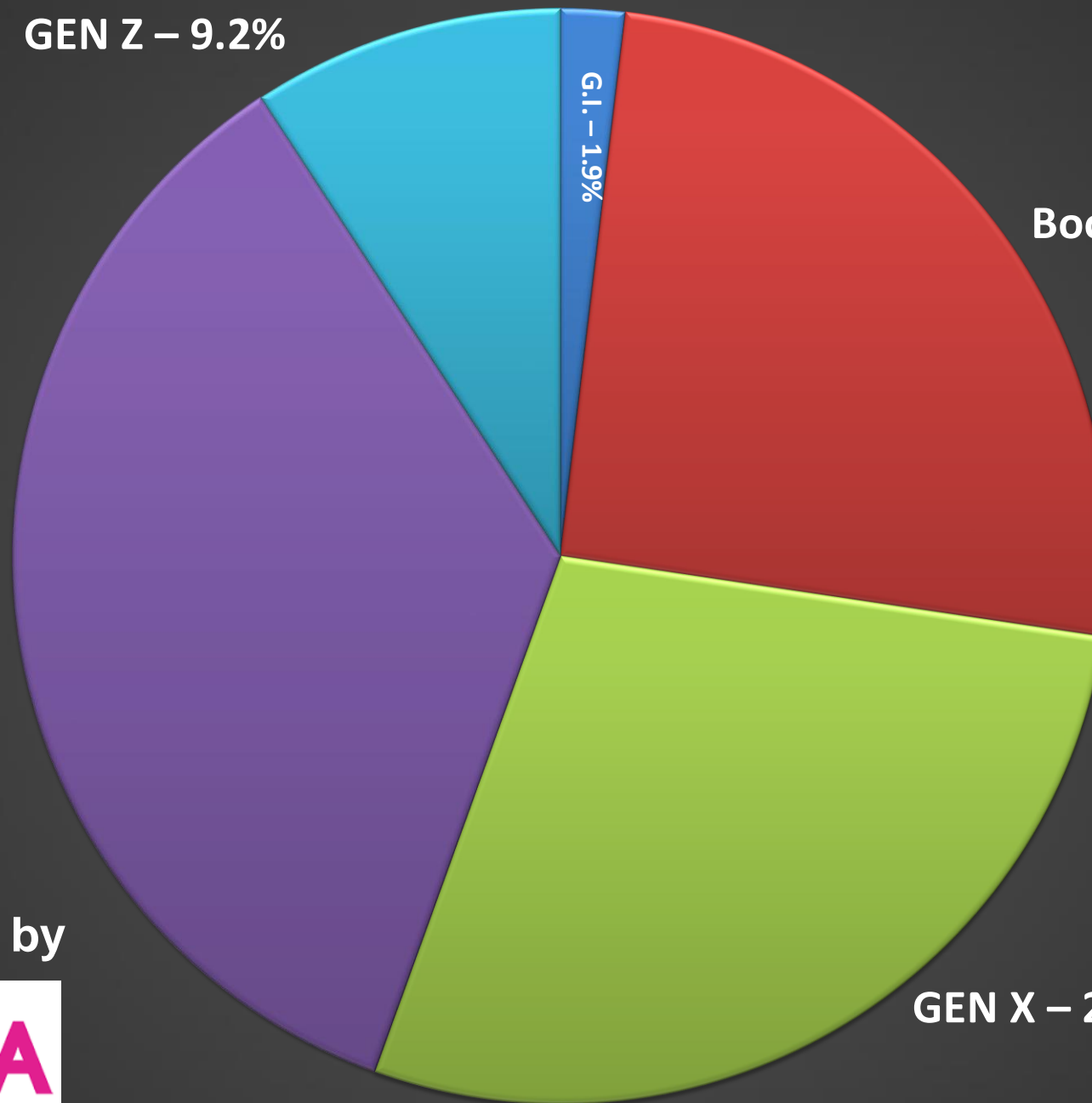
Millennial –
35.2%

GEN X – 28.1%

Statistics Provided by

VISIT
FLORIDA

■ G.I. ■ Boomer ■ Gen X ■ Millennial ■ Gen Z



Activity	Percentage
Beach / Waterfront	39%
Shopping	24%
Culinary – Dining Experience	22%
Culinary Typical Restaurant Dining	22%
Visit Friends / Relatives	16%
Theme Parks	16%
Touring / Sightseeing	14%
Birthdays	11%
Business / Work	10%
Nightlife	10%
Special Dining Experience	9%
Fishing	7%
Boating	7%
National / State Parks	7%
Movies	7%
Live Music	6%
Biking	6%
Museums / Art Exhibits	5%
Golfing	5%
Festival / Fairs	5%
Historic Sites	5%

Statistics Provided by



Top Activities 2023

Our Way of Thinking



Advertise

What

We Don't Have



ST. GEORGE ISLAND STATE PARK

#1 BEACH IN AMERICA 2023



For over three decades, Dr. Stephen Leatherman ("Dr. Beach") has reviewed, evaluated and rated beaches and coastal areas throughout the world. In addition to his annual ranking of America's Best Beaches, he works tirelessly to increase awareness about the dangers of rip currents and to promote no smoking at beaches.



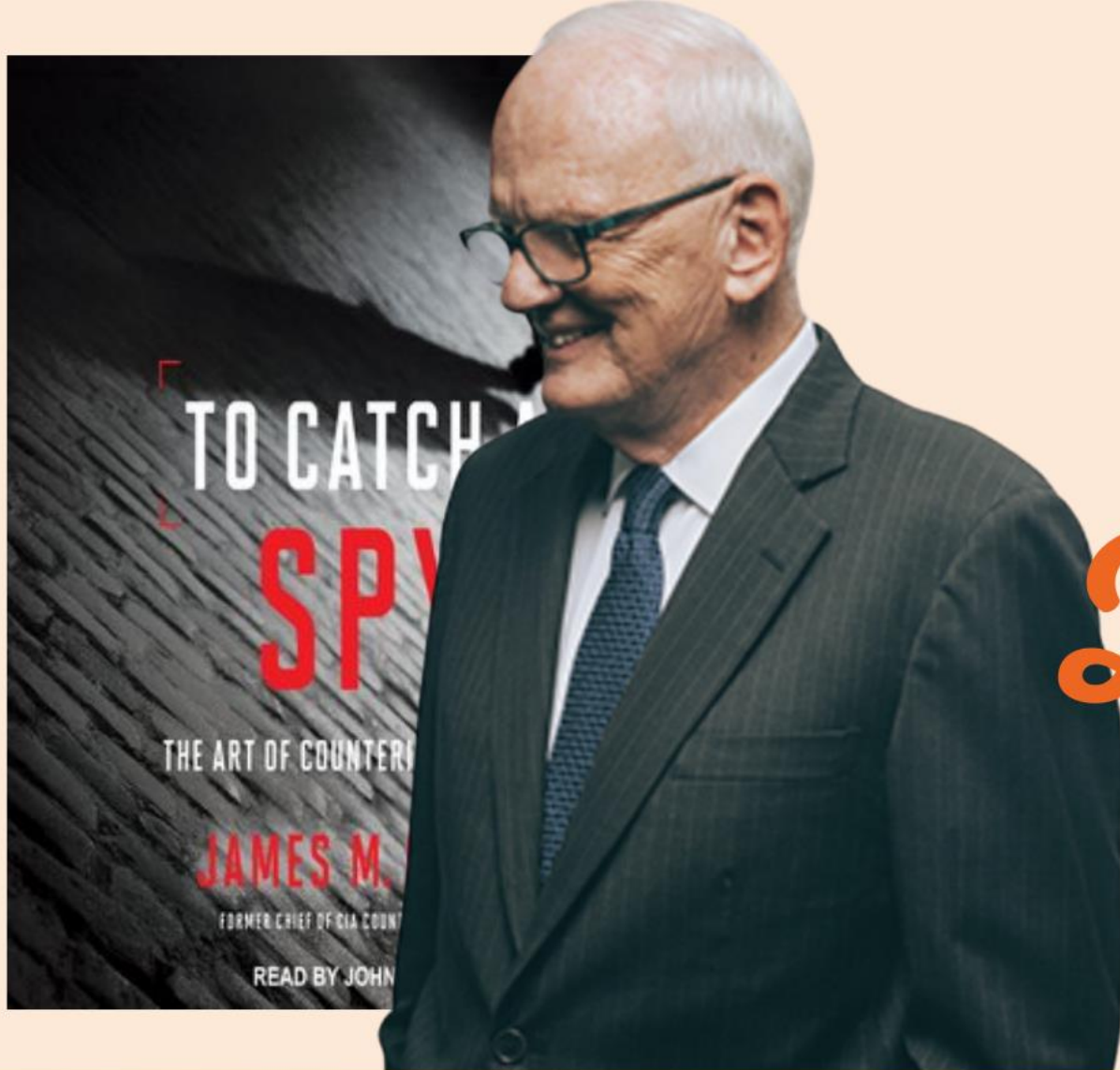
John Solomon



Director Franklin County TDC

Email:

fctdcdirector@floridasforgottencoast.com



Hear his story at

Closing Breakfast

Friday, June 28 at 8:30 am
Floridian A-C

James Olson

Former Chief of Counterintelligence - CIA

FLORIDA ASSOCIATION OF COUNTIES

Celebration **DINNER**

Join us for an evening of celebration as we honor the 2024 Institute for County Government graduates and Charlotte County Commissioner Bill Truex will hand the reigns of FAC President to Okeechobee County Commissioner Terry Burroughs!

THURSDAY, JUNE 27

6 P.M. - 8 P.M.

Floridian D-I



Sponsored by:

