



DISCOVER
THE PALM BEACHES
FLORIDA

Tourist Development Council

2021 ANNUAL REPORT





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Active Links to websites of Tourist Development Funded Agencies & Assets are available throughout this report, click on logos, pictures or active links in [Blue](#)

Palm Beach County Board of County Commissioners



(front row left to right): Vice Mayor Gregg K. Weiss, Mayor Robert Weinroth, Dave Kerner;
(second row left to right): Maria G. Marino, Mack Bernard, Maria Sachs, and Melissa McKinley

Tourist Development Council



Maria Sachs
Chair



Jim Bronstien
Vice Chair



Davicka Thompson



Jim Mostad



Kelly Shoaf



Don Dufresne



Christina Romelus



Daniel Hostettler



County Administrator: Verdenia C. Baker



Dear Mayor, County Commissioners and TDC Board Members,

It is our pleasure to present this Annual Report of the [Palm Beach County Tourist Development Council](#) (TDC) covering operations for the fiscal year 2021.

The impact of the Covid Pandemic was swift in March 2020, and the Palm Beach County TDC began our recovery efforts immediately, working through the Covid surges that occurred in the Summer and Fall of 2020, slowing our recovery of visitation. The pent-up demand of the leisure traveler continued in FY2021 as drive-market leisure visitors, from across Florida and the Southeast, enjoyed our magnificent PBC Parks & Recreation system, with environmental open-air experiences, and our 47 miles of beaches. The benefit of outdoor sports venues, whether for golfing, amateur or professional baseball, soccer, lacrosse or pickleball, all provided the needed attractions for travelers to also return to the Palm Beaches.

The recovery of tourist development funds also known as “Bed Taxes” generated from our visitors staying in accommodations throughout Palm Beach County is bright, providing the funding to our contracted tourism organizations to market, promote, administer grants, and operate and maintain tourism generating assets constructed using tourist development tax dollars. The increasing return of investment from tourist development taxes lessens the tax burdens on our residents and contributes to our residents’ “quality of life” in Palm Beach County. The TDC has continued to fund beach restoration to the County Environmental Resource Management group (ERM), to maintain the miles of public access coastline for visitors to enjoy and use.

As one of the largest industries in Palm Beach County, the Leisure and Hospitality sector normally employed more than 95,000 people. The Pandemic reduced this employment to 51,000 in April of 2020 for those servicing our visitors when here in the County. We have continued to see improvements in the employment numbers, with November 2022 at 87,000 jobs in the sector. Still 10 percent lower than where we would normally be. It is projected that more than 7 million people visited the Palm Beaches in 2021 and we are driving to exceed our record 2019 visitation of 8.2 million visitors in 2022. Our visitors enjoy best in class hotels and resorts, world class cultural performances and venues, lifestyle sports facilities including being home to four Major League Baseball Spring Training teams, our globally recognized equestrian venues, restaurants for all tastes, shopping for all pocketbooks, along with breathtaking beaches and environmental adventures from Lake Okeechobee to the Everglades. We partner closely with the Palm Beach International Airport in support of marketing new air service opportunities to the County from new and existing feeder markets for both the leisure and the business traveler.

The hospitality industry in the Palm Beaches plays a significant role to our County’s economic vitality. We are proud to provide these marketing services for our tourism partners, local governments, and the Palm Beach County business community.

Glenn Jergensen, Executive Director

[Palm Beach County Tourist Development Council](#)



Tourist Development Mission

Palm Beach County will be a globally recognized destination that all visitors will want to experience because of its culture, lifestyle, and amenities.

Tourist Development Objectives

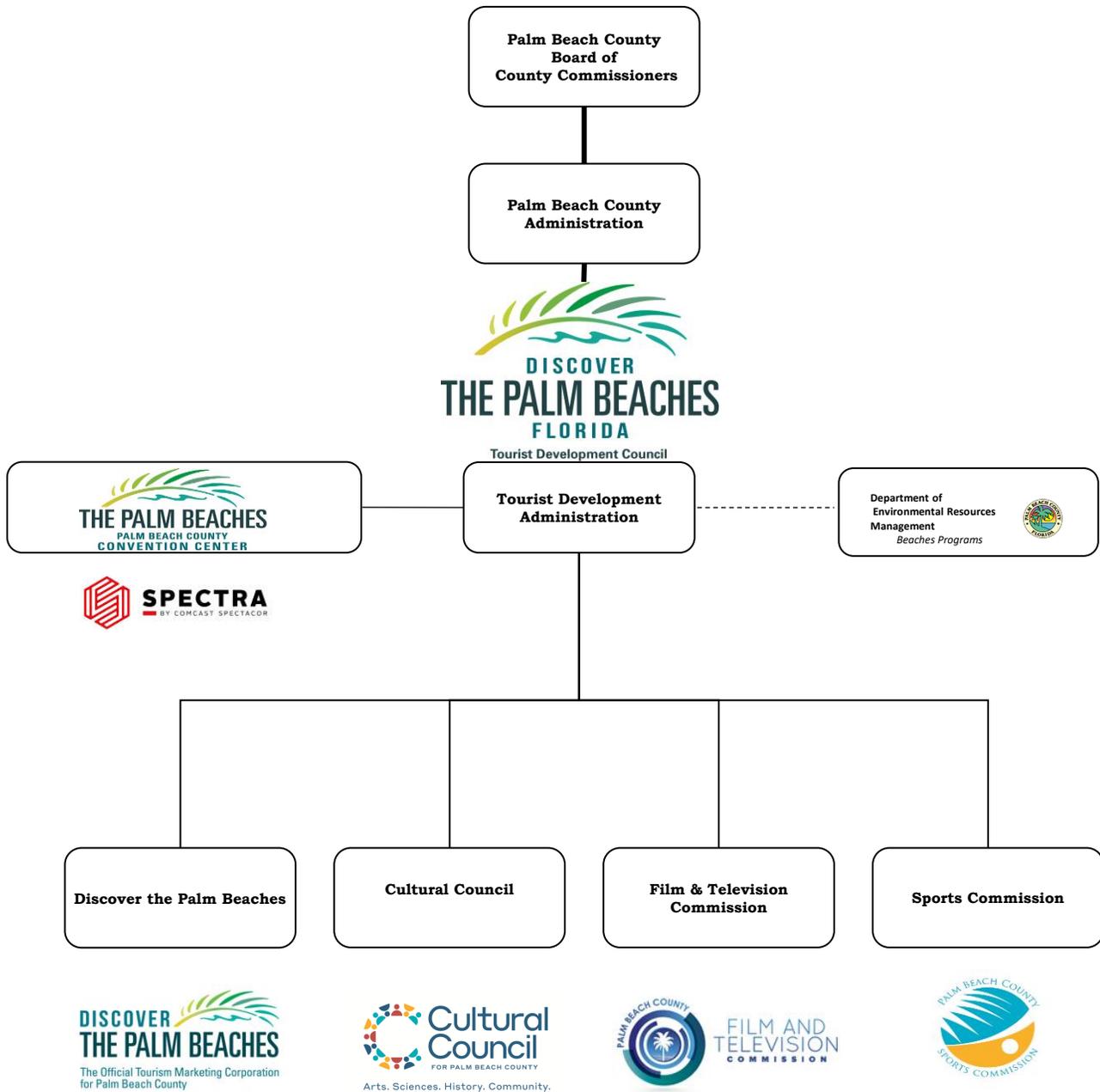
- Invest Tourism Taxes to Generate a Maximum Return
- Determine the Success of each tourism program
- Provide leadership in marketing and development of local amenities for future economic benefit
- Advisory body to the Board of County Commissioners on Tourism matters
- Ensure compliance with State & Local statutes governing Tourism

Legal authority for the Palm Beach County Tourist Development Council (hereinafter referred to as the “TDC”) is found under Section 125.0104, Florida Statutes, known as "The Local Option Tourist Development Act", the COUNTY has by Ordinance 95-30, as amended, established the TDC; has levied and imposed a tourist development tax; and has established a Tourist Development Plan for the use of the funds derived from the tax. As an appointed Advisory Board, the Council is bound by State and County Laws, ordinances, and procedures governing the Council members and their activities, as well as procedures for reviewing expenditures of tourist development tax revenues. The TDC is responsible for advising the COUNTY on the implementation of the Tourist Development Plan on matters related to tourism sales, marketing, advertising, tourism grants, and convention center sales in order to help increase overall visitation and lodging facility occupancy in accordance with State and County laws, regulations and procedures and within budgetary limitations imposed by the Tourist Development Tax Revenues. The TDC shall also approve and make recommendations for all contracted Agencies annual Marketing Plans and Budgets to ensure conformity with the Tourist Development Council Strategic Plan and the provisions of Section 125.0104, Florida Statutes.



Palm Beach County Tourism

The Organization



A SNAPSHOT OF 2021

Overall Economic

Impact

7.0 Billion

Number of Room Night Inventory Available

6,556,930

Number of Room Nights Sold

3,837,678

Discover Groups & Meetings

**81,381 Room Nights
Booked**

SPORTS

**50 Events/40+ Sports
227,605 Room Nights
Actualized**

FY19 Bed Taxes Collected

\$54,202,757

FY20 Bed Taxes Collected

\$43,311,722

FY21 Bed Taxes Collected

\$51,004,689

**Up 18% over '20
Down (6%) over '19**

PBC Convention Center Groups & Meetings

**40,834 Room Nights
Booked**

(shared with Discover)

PBI Passengers Average 12 Month Rolling

4,264,037

Leisure & Hospitality Employment

80,400 Jobs (Sept. 2021)

Bed Taxes – 35 Year Historical Timeline



1982-1983

1 Cent 70% Marketing/30% the Arts



1984-1988

2 Cents 70% Marketing/30% the Arts



1989-1994

3 Cents 55% Marketing, 25% Arts
17% Beaches, 3% Sports



1994-2006

4 Cents 40% Marketing, 17% Arts
11% Beaches, 4% Sports, 3% Film
25% Debt Service Stadium/Conv.,
Convention Ctr. Operating & RR



2007- 2015

5 Cents 31% Marketing, 14% Arts,
8% Beaches, 4% Sports, 3% Film
20% Stadium/Convention
Debt Service, 20% Convention
Center Expansion, Operating & RR

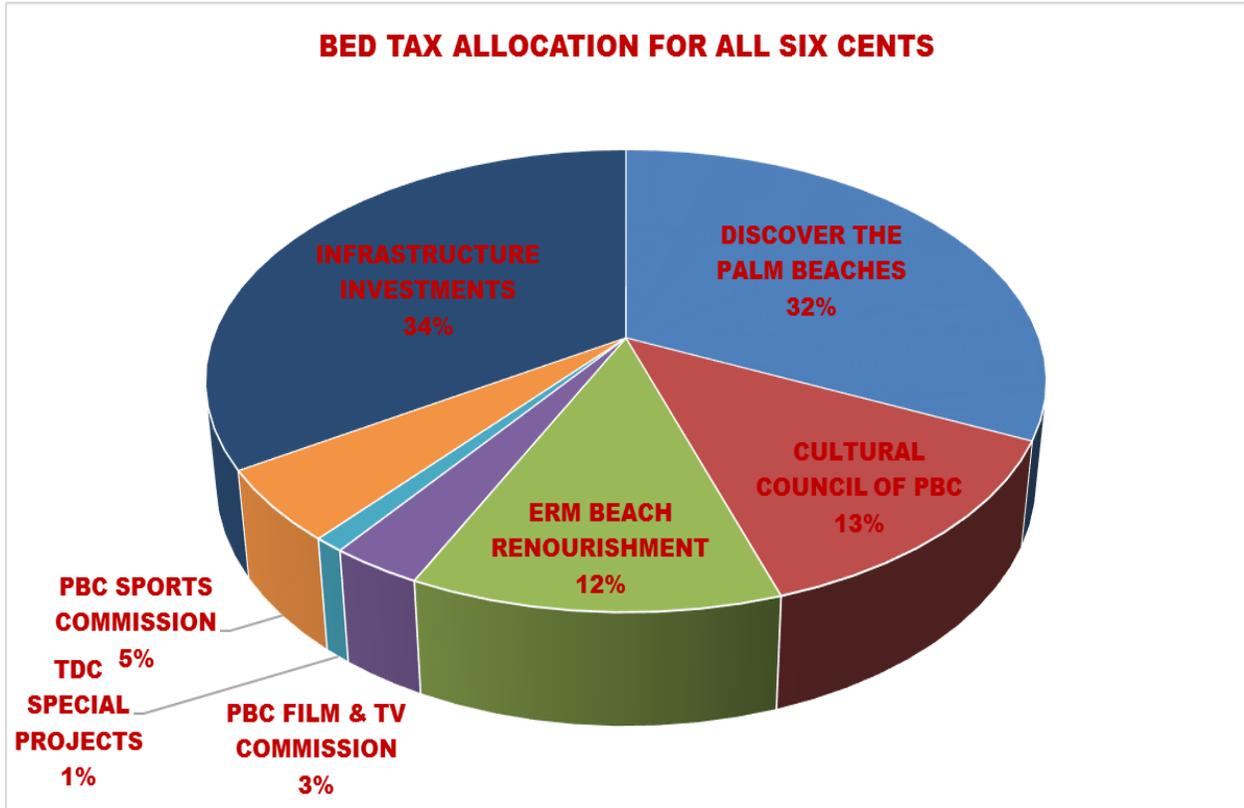


2015- Beyond

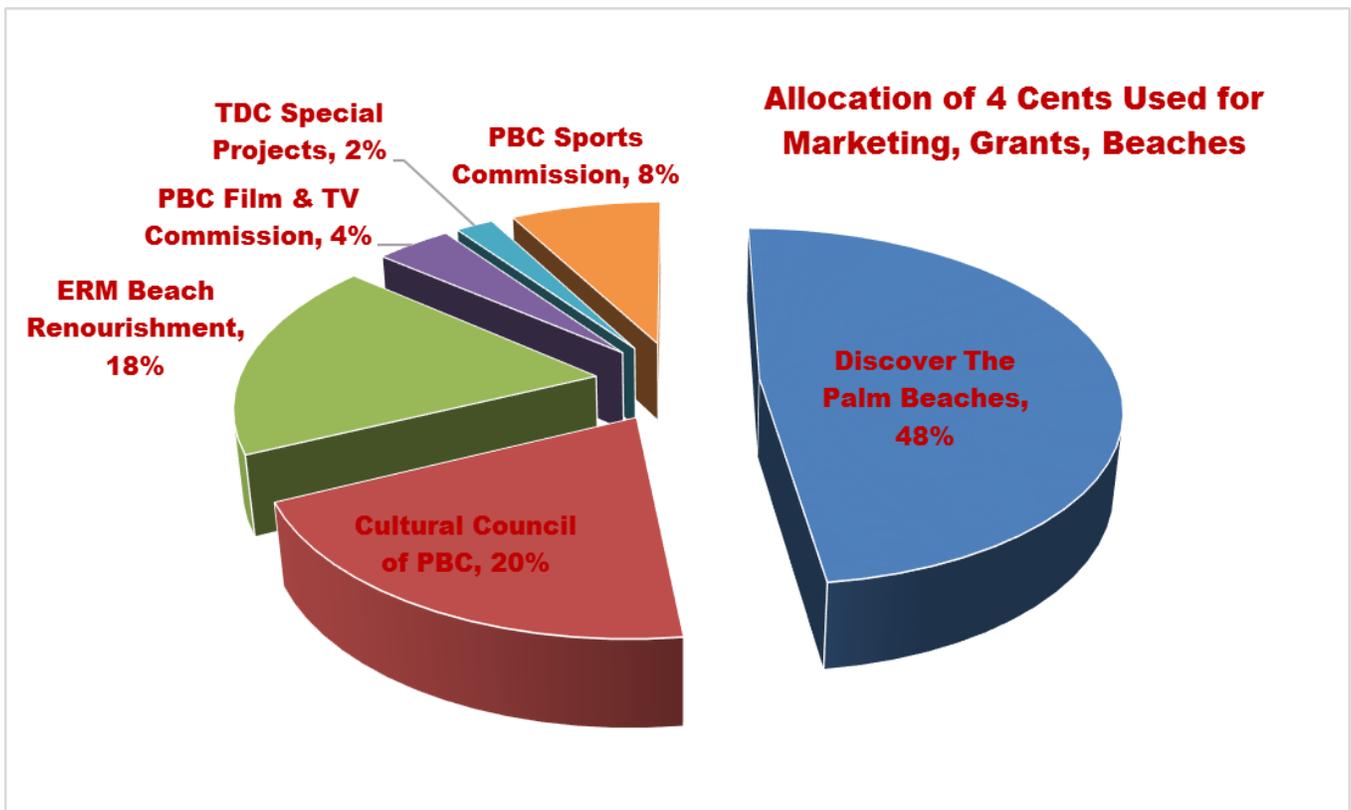
6 Cents 54% Marketing & Arts, 12%
Beaches 17% Debt Service
Stadium/Convention Debt Service, 17%
Convention Ctr. Expansion, Operating & RR



Bed Taxes – Total Allocation



Bed Taxes – Marketing/Beaches Allocation



Economic Sustainability Goal: Preservation & Recovery of Existing Businesses including Tourism & Hospitality

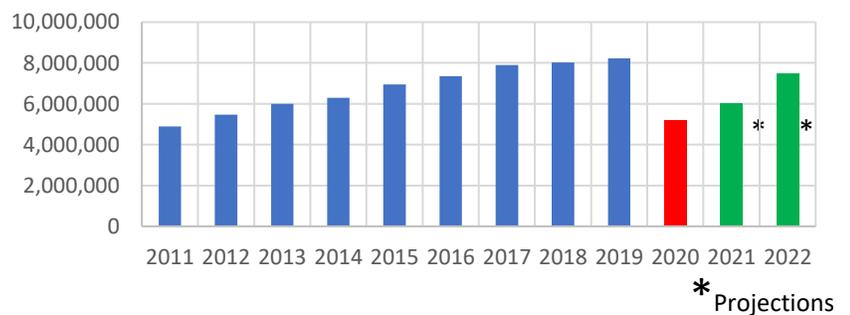
Metrics

- Tourist Development Tax (Bed Tax) collections
- Annual Leisure, Groups & Meeting & Sports tourism visitors
- Annual PBC Convention Center Hotel Room night bookings
- Annual Sports Tourism Hotel Room nights actualized
- Eco tourism visitor growth year over year

Each TDC Agency has 6 to 8 Performance Metrics monitored by TDC



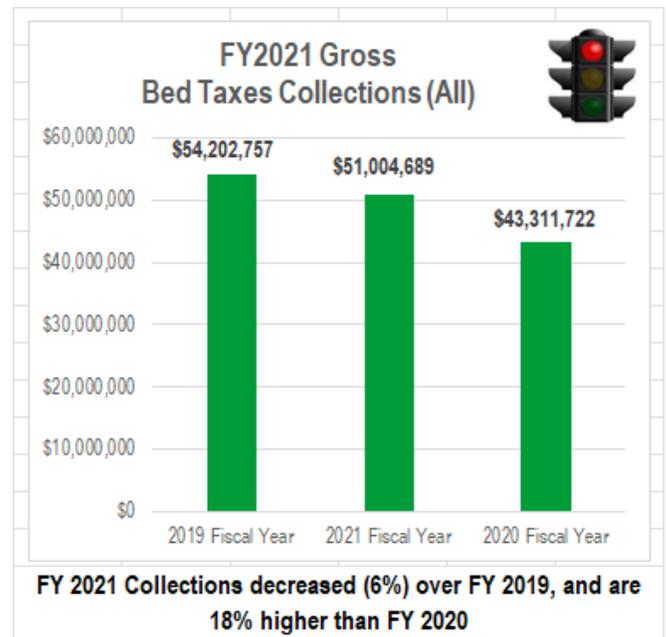
ANNUAL VISITATION TO THE PALM BEACHES
 Millions of Visitors



Economic Sustainability Goal: Preservation & Recovery of Existing Businesses including Tourism & Hospitality

Strategies:

- Promote Health and Safety of the Palm Beaches highlighting our Beaches, Environmental areas and recreational/parks open spaces.
- The Leisure Travel will drive the recovery.
- Sports Tourism will recover quicker than our Groups and Meetings/Convention business, as Business travel is slow return.

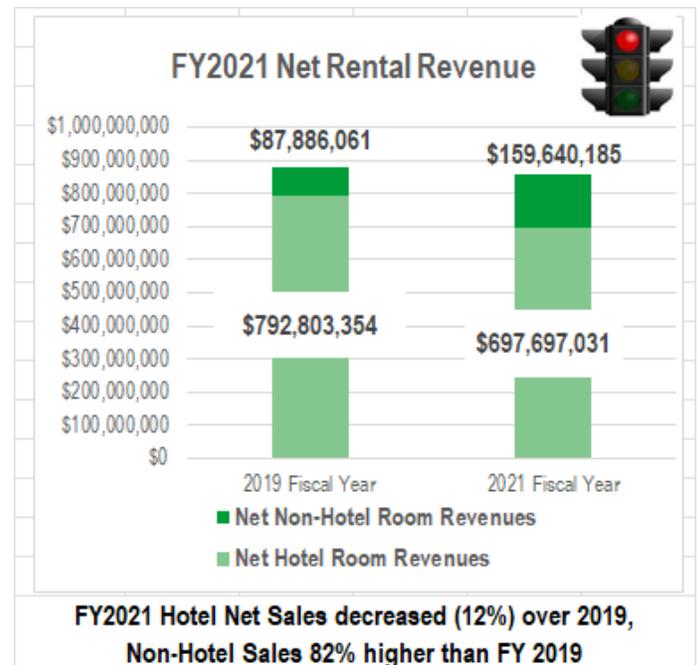


- Recovery in cultural venues and performing arts centers, improve as vaccinations expand.
- Partner with private sector developing eco and sporting events amenities at County parks, existing venues and natural environmental lands.

Economic Sustainability Goal: Preservation & Recovery of Existing Businesses including Tourism & Hospitality

Fiscal Year 2021 Results

- The Leisure Travel Industry has continued its Recovery. Record Bed Tax Collections for April through August as the Palm Beaches “Open Spaces and Quiet Places” welcome both Drive Market and Air Travelers.
- Business Travel & Groups and Meetings remains slower to return to our Record 2019 levels of activity.





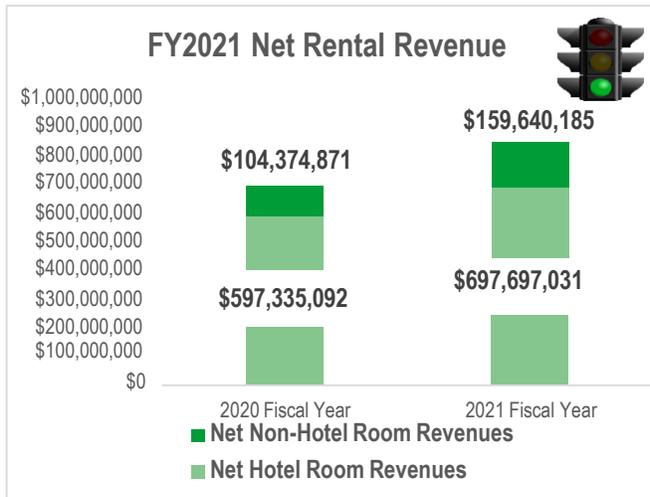
TDC Accomplishments 2020 & 2021

Implementation of the Tourism Industry Recovery

- Develop plans to maximize the impact of marketing by all TDC agencies in support of the pandemic recession of the 2nd half of 2020 and through 2021 as the tourism industry contracted by (20%), to equal that of the “Great Recession” of 2008/2009.
- Proposed and received approval to utilize TDC reserves for our marketing recovery plans in the effort to highlight health and safety messaging in our advertising using a very specific staged approach roll-out to our traditional markets, both fly and drive visitors across the US.
- All TDC Agencies collaborated to adopt the GBAC certification process of tourism assets across the County utilizing relationships developed by the Discover agency. This accreditation of the Global Bio-risk Advisory Council (GBAC) was achieved by PBI, the PBC Convention Center, the two spring training stadiums, various hotels, and cultural venues across the county willing to make the labor investment required for this process intense certification.
- Proposed and received approval to create a Marketing Stimulus Fund across all TDC marketing agencies to supplement the lowered operating budgets of all agencies impacted by the (20%) reduction in bed tax revenues. This \$6 million dollar stimulus fund was created with the use of special projects and marketing reserves and our ability to borrow uncommitted beach renourishment funds in the amount of \$2 million dollars, that will be repaid to the beach renourishment program over the coming years. This funding allowed Palm Beach County to remain “top of mind” in our key advertising markets throughout the pandemic. Our message “When You’re Ready, We are here to Welcome you and your family with Open Palms”. Health and safety messaging was always a key tagline.
- Developed monthly checkpoint updates for the TDC Board to monitor the recovery activity for bed tax revenues, our only funding source at the TDC. With our checkpoint #17 completed, we reported to the TDC in September the recovery is strong and exceeding our expectations. The future is bright for 2023.
- These checkpoints allowed the TDC to plan our revenue recovery for 2022 Budgets and the outlooks for 2023 through 2026 allowing us to plan future tourism asset investments and our industry recovery, led by the Leisure and cultural traveler, sports tourism, and events and planning for the delayed recovery of business travel and the return of groups and meeting conferences to our convention center in the later part of 2022 and into 2023.
- Completed update to TDC strategic plan for 2022 – 2025.

Tourist Development Council Dashboard

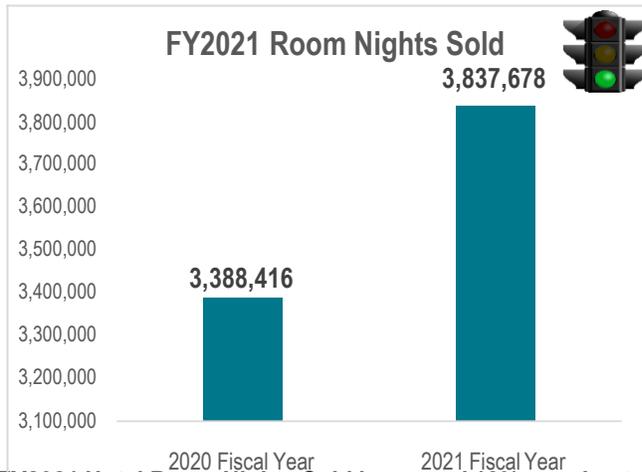
Fiscal Year 2021 vs. 2020



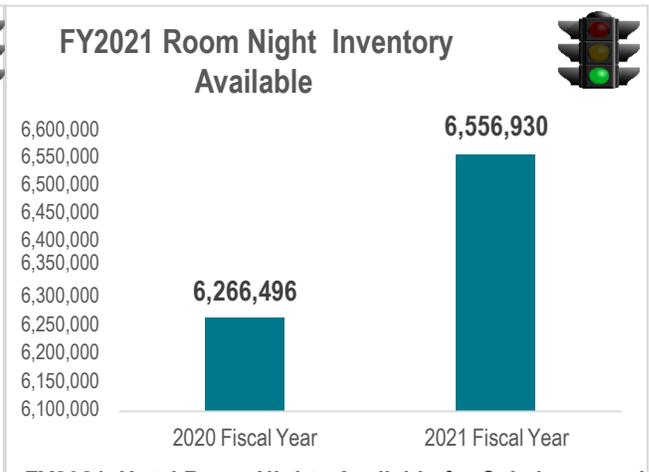
FY 2021 Hotel Net Sales increased 17% over Last Year, Non-Hotel Sales increased 53% over Last Year



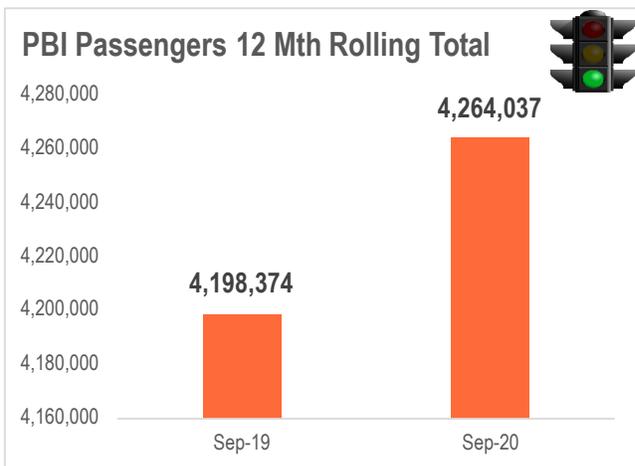
FY2021 Collections increased 18% over Last Year, compared to FYTD Forecast higher by 38%



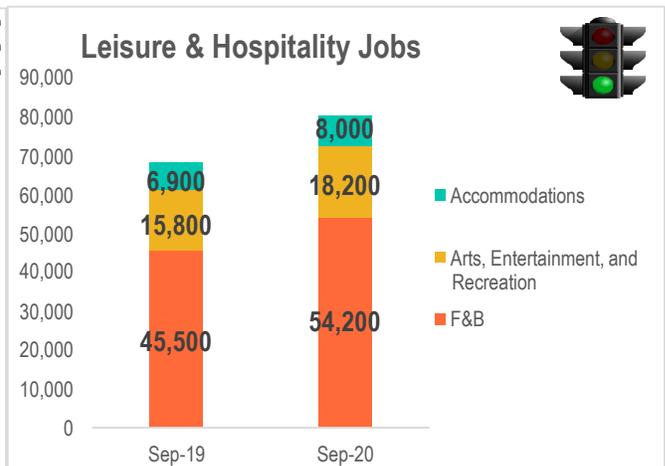
FY2021 Hotel Room Nights Sold increased 13% over Last Year



FY2021 Hotel Room Nights Available for Sale increased 5% from Last Year



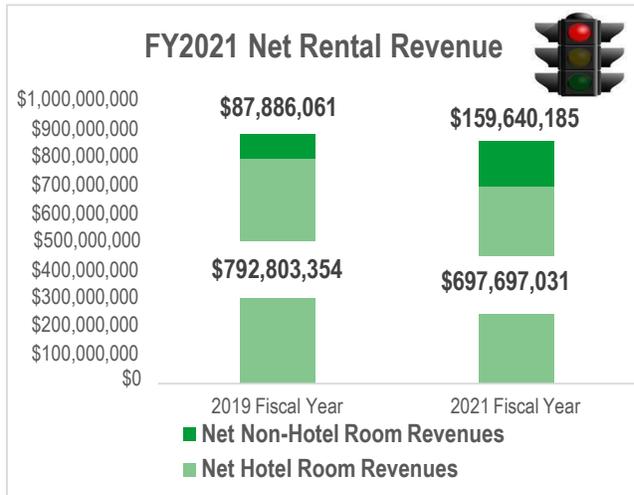
September 2020 Passengers Through PBI is up 2% over Previous 12 Month Rolling Actuals



September 2020 at 80,400 up 18% over Last Year ; F&B at 54,200 increased 19%; Arts & Entertainment at 18,200 up 15% ; Hotels at 8,000 up 16%

Tourist Development Council Dashboard

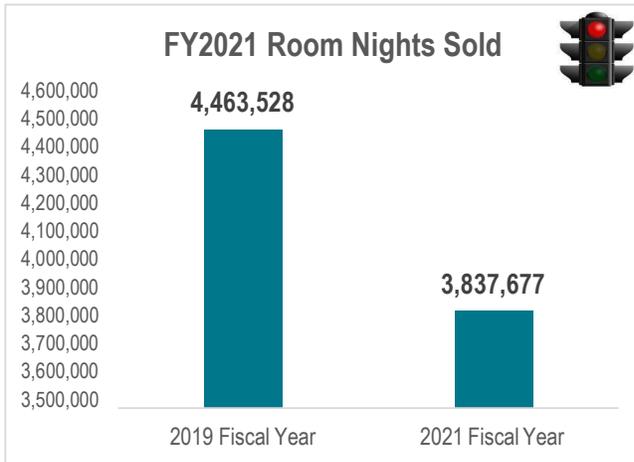
Fiscal Year 2021 vs. 2019



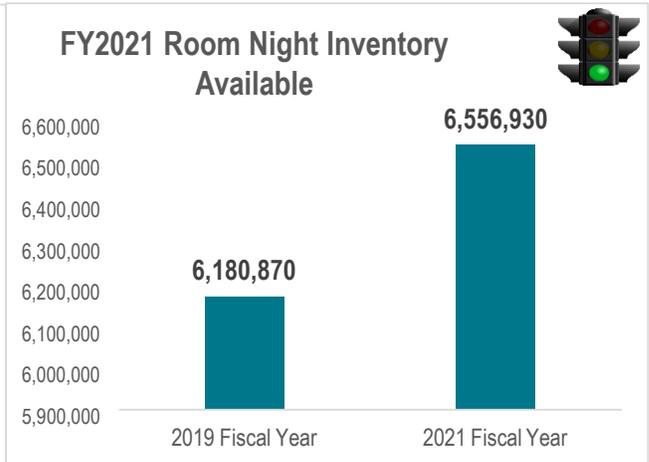
FY2021 Hotel Net Sales decreased (12%) over 2019, Non-Hotel Sales 82% higher than FY 2019



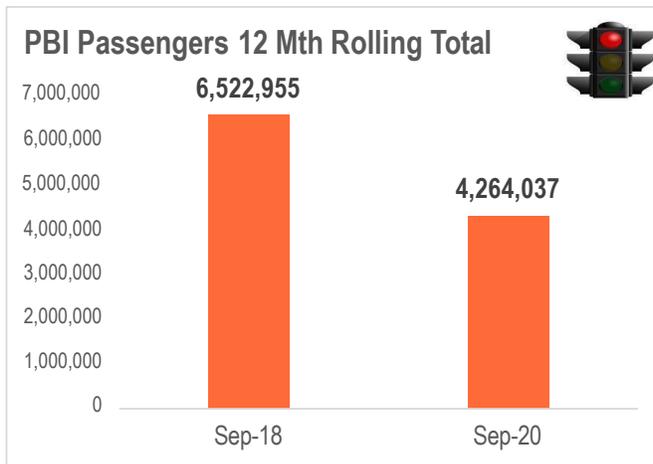
FY 2021 Collections decreased (6%) over FY 2019, and are 18% higher than FY 2020



FYTD 2021 Hotel Room Nights Sold decreased (14%) over FYTD 2019



FYTD 2021 Hotel Room Nights Available for Sale increased 6% from same period 2019



September 2020 Passengers Through PBI down (35%) over Previous September 2018 12 Month Rolling Actuals

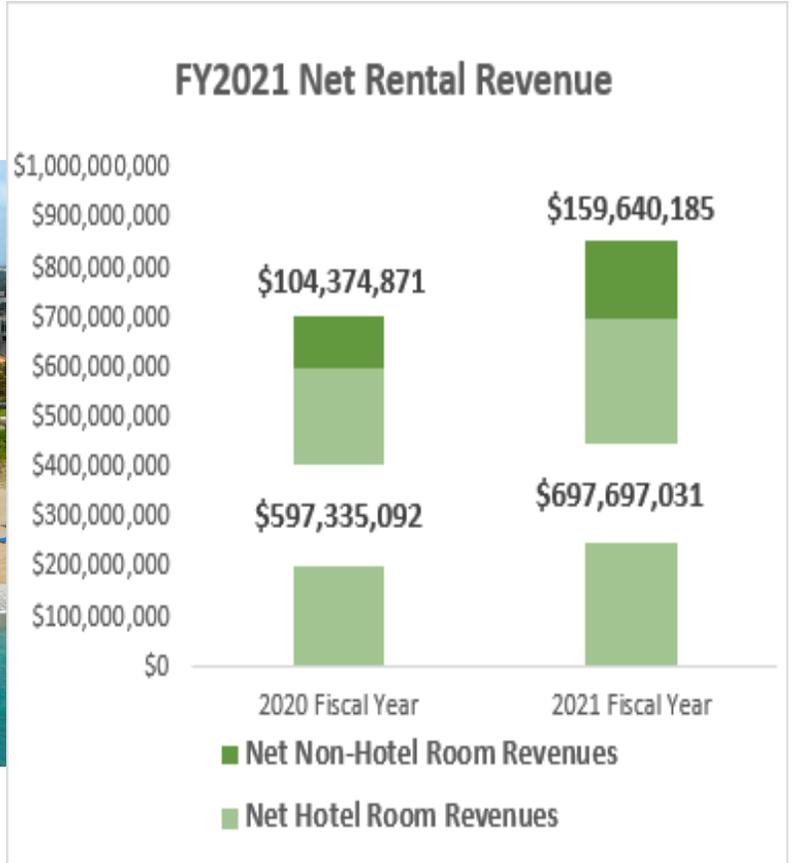


September 2020 at 80,400 down (5%) over 2019 ; F&B at 54,200 decreased (4%); Arts & Entertainment at 18,200 up 4%; Hotels at 8,000 down (25%) over September 2018

Fiscal Year 2020 vs 2021

Accommodations Revenue Performance

- Hotel Room Revenue 17% Higher than Last Year
- Hotel Room Revenues \$698 Million Dollars
- Non-Hotel Revenue 15% Higher than Last Year
- Non-Hotel Room Revenues \$160 Million Dollars
 (Condominiums, Airbnb, VRBO, Timeshares, Single Family Residential)



Hotel Room Nights *Fiscal Year Performance*



**Total FY
2021
Room
Nights
Available
for Sale
6.6 Million**

**5% Growth in
Available Room
Nights Yr./Yr.**

**Total FY
2021
Room
Nights Sold
3.8 Million**

**13% Growth in
Room Nights
Sold Yr./Yr.**



Bed Tax Collections

FY2021

- **\$54.2M** FY 2019 Record
- **\$43.3M** FY 2020, Down
(20%) *Equal to Great Recession*
- **\$51.0M** Actuals FY 2021

Key Metrics Calendar Year January to December 2021 vs 2020

Occupancy Calendar Year

CY21 64.1% vs. 46.1%
(39.1%) Increase to previous year

Average Daily Room Rate

CY21 \$204.26 vs. \$182.66
11.8% Higher than previous year

Revenue per Available Room

CY21 \$130.97 vs. \$85.00
55.6% Higher than previous year

Source: Smith Travel Research CY = Calendar Year



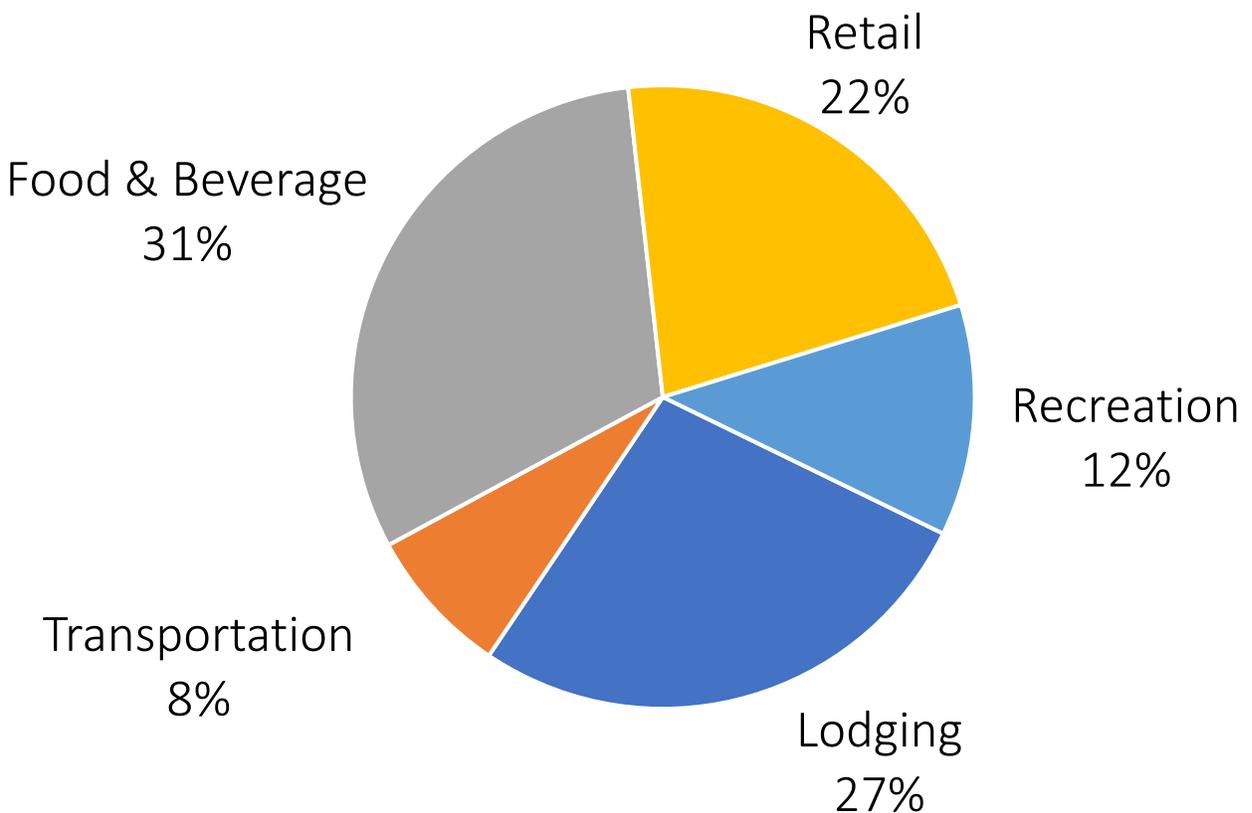
2021 Economic Spending



\$7.0+ Billion in
Total
Economic Impact

\$4.5+
Billion in Direct
Visitor Spending

Spending by Sector in The Palm Beaches

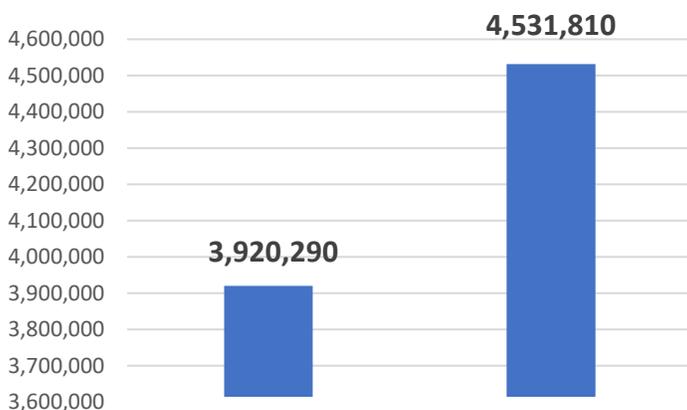




**200+ nonstop
daily flights
31 nonstop
destinations**

Palm Beach International Airport

**PBI Passengers 12 Month Rolling
Total**



Palm Beach International Airport

- Named 8th Best Domestic Airport in Travel + Leisure Magazine’s 2021 World’s Best Awards
- Named 7th Best Airport in The U.S. by Conde Nast Traveler’s 2021 Readers’ Choice Awards
- Ranked #1 across the U.S. for the shortest overall wait times at TSA Checkpoints.

October FY22 Passengers through PBI were up 16% over Previous 12 Month Rolling Actuals

For more information, visit pbia.org

ACCOMPLISHMENTS

2021 Discover Leisure Travel & Groups/Meetings

Strengthen Brand Awareness & Marketing

- Produced and launched new campaign: The Original, The Only – The Palm Beaches
- Incorporated new and refreshed equity, and inclusion content across all digital channels through blogs and landing pages on The Palm Beaches. Com and through email communications to visitors.

Expanded Meetings & Events

- Developed health and safety tools to effectively manage and successfully support events in The Palm Beaches in partnership with hotels and other stakeholders.
- Elevated The Palm Beaches as a meetings destination by hosting PCMA Convening Leaders 2021 Live in the Palm Beaches to 60 key customers, community, and industry leaders and over 6000 virtual attendees.
- In partnership with Palm Beach Film Commission advanced the impact of hybrid meetings to the Palm Beaches through interactive customer workshops.

Ensure Organizational Sustainability

- Leveraged industry thought leaders in transition from DestinationNext to Organizational, keeping DTPB in the forefront of Destination Management & Marketing.

Equity, Diversity, & Inclusion

- Collaborated on the first Arts & Tourism Summit on EDI with the Cultural Council



Elliott L. Ferguson, President & CEO Destination DC

ACCOMPLISHMENTS

2021 Cultural Tourism Marketing & Grants

COVID-19 Relief and Recovery

- Launched a Covid-19 hub at palmbeachculture.com/covid-19 that was updated several times a week to include event schedule changes, resources for artist & cultural organizations, virtual cultural experiences, and more.
- Created a #PalmBeachCulture “Wish List” to encourage audiences to share favorite local cultural experiences on social media.
- Supported The Palm Beaches Pledge along with additional countywide mask mandates and health and safety guidelines on social media, in national public relations efforts, and on the Council’s website.

Marketing & Advertising

- Sent curated swag boxes and secured nine virtual deskside meetings with national travel & arts media in December to highlight the destination, COVID-19’s impact on the sector, and major upcoming cultural events engaging journalists from Forbes, Travel + Leisure, Town & Country, Veranda, Southern Living, Galerie, Country Living, and Departures.
- Successfully launched and managed MOSIAC 2021. Highlights included 51,000+ email sign-ups, 104,000+ social media impressions, and 14 “earned media stories (68 million impressions).

Grants

- Incorporated Equity, Diversity, and Inclusion in all aspects of the grant application and evaluation process.

Cultural Concierge Program

- Provided support for PCMA Convening Leaders 2021 by engaging artist Gregory Dirr to create a custom live art installation during the OCMACL in the pre-event space; activated the Shades of Culture pop-up display to welcome arriving guests to the public art in downtown West Palm Beach.

Equity, Diversity, & Inclusion

- Partnered with Discover The Palm Beaches to present the Arts & Tourism Summit on Equity, Diversity, and Inclusion to address EDI issues and access for cultural organizations, creative professionals, tourism leaders. This two-day event featured nationally recognized speakers and breakout sessions providing targeted workshops and facilitated dialog.



ACCOMPLISHMENTS

2021 Sports Tourism Marketing & Grants

COVID-19 Recovery

- FY21 represents the year of recovery for sports tourism in The Palm Beaches. The Palm Beach County Sports Commission supported a recovery that led to return of statewide and national events.
- The Sports Commission hosted over 150 events and more than 227,000 room nights. The room night production and volume of tourism events increased compared to the production levels created during the pandemic year of 2020.
- The Sports Commission summer campaign of events signifies the revival of sports tourism. After hosting the Baseball Americas Qualifier for the XXXII Olympiad, Sports Commission events experienced a full recovery in terms of reach and potency. During the summer, the Sports Commission developed a collection of 69 events that created nearly 60,000 room nights.

Events

- Palm Beach County was home to marquee sporting events, such as the Winter Equestrian Festival, The Honda Classic, the TimberTech Championship, the Delray Beach Open, and the Boca Raton Bowl. Major tournaments persevered and created significant tourism benefits, such as Men's Senior Baseball League Fall Classic, Prospect Select Baseball's National Showcase, the United States Tennis Association Clay Court National Championships, Balling on the Beach (200+ team basketball event), the First Responder Games, and the Cal Ripken Baseball 10U & 12 U World Series.
- The Sports Commission hosted the NCAA Division II Men's Golf National Championship, this was the second NCAA Golf National Championship to take place in the last three years and the Sports Commission will host three more in the coming years.





ACCOMPLISHMENTS

2021 Film & Television Content Marketing

Production

- Cumulative totals for Production days, permits, non-permit productions, leads and lead conversions in FY21 have surpassed that of pre-pandemic production numbers, showing that the production industry is recovering from the hardships and obstacles presented by COVID-19.

Marketing

- Completed the following notable projects through the tourism branded content sponsorship program – Two episodes of On The Town in The Palm Beaches titled “Black Voices” and “Hispanic Heritage”; one episode of A Wild Connection – Sea Turtles of the Palm Beaches; two episodes of Art Adventures of The Palm Beaches; 20 COVID-19 PSAs for Palm Beach County; one episode of Drive The Palm Beaches.
- The Palm Beaches TV reached 40 hours of original high-quality, family-friendly entertainment. It is available in 4500 hotel rooms in the County.
- Completed 62 episodes over five seasons of The Palm Beaches TV weekly Facebook Watch Party series. Total reach 711,259, total views 419,233.

Community Engagement & Public Relations

- Expanded diversity initiatives across multiple programs

	Q1-Q3 FY19	Q1-Q3 FY20	Q1-Q3 FY21	FY19 vs FY21
Production Revenue <i>in Millions</i>	\$201.8	\$154	\$159.9	-20%
Hotel Room Nights	15,221	11,051	8,730	-42%
Production Days	14,613	14,522	12,999	-11%
Permits	266	185	311	17%
Shot No Permit	170	149	211	24%
Leads	225	188	261	16%
Lead Conversions	91	83	134	47%



ACCOMPLISHMENTS

2021 Conventions, Meeting & Conferences

Finance

- The fall 2020 and spring 2021 COVID-19 surges along with the arrival of the Delta variant have played havoc on the convention center event schedule throughout the entire year. Millions of dollars of business had to be postponed or cancelled during the year with no opportunity to replace the lost income.
- Despite all the challenges faced because of COVID-19 the convention center team did post the highest grossing June in the facilities history when things started to open back up and before the Delta variant surge began.

Sales

- With the pandemic still affecting the tourism industry, the convention center sales team redirected their focus on securing short term programs by developing stronger partnerships with new, local businesses and existing clients to offer clean, safe and socially distanced events. As a result, nine new clients made their debut at the center, twenty existing programs returned several times throughout the year, and we saw an increase in conventions and consumer shows over the last fiscal year.
- Together with the Palm Beach County Sports Commission, the Palm Beach County Convention Center introduced six sporting events and maintained seven existing programs which generated over 5,000 additional room nights to the destination.
- As community partners with Discover The Palm Beaches, the convention center sales team not only participated in several destination reviews and site visits, but also hosted the first ever satellite location for PCMA's Convening Leaders 2021 Annual Conference and ASAE Annual Meeting Community Pop Up.



ACCOMPLISHMENTS – CONT.

Event Services

- Through the course of the fiscal year, the events team successfully managed eighty-eight events, which included high profile events such as Turning Point, TRENDZ Tradeshow, Palm Beach Jewelry, Art and Antique Show, Palm Beach Home, Design and Remodeling Show, Balling on the Beach, United Franchise Group World Expo and National Hardwood Lumber Association Annual Convention and Expo.

Operations

- Renewed the convention centers GBAC accreditation for safety and sanitization in response to the world-wide pandemic.
- Major R&R projects completed – SKY room, the transformation of the north end courtyard was ready to host events in September 2021, the replacement of the facilities sound equipment, along with the complete replacement and upgrade of our CCTV security camera system.

Food Service

- The pandemic has had a great impact on personnel and revenue.
- In response to the staffing and product shortages we have strengthened our partnerships with our local small and minority businesses. These partners include, Trinity Gourmet, Ganache Bakery, and Oceana Coffee.





Emerging Issues FY22

Discover

- On the road to recovery from the pandemic, most destination organizations are re-evaluating their purpose and evolving their mandates. Many are faced with a crisis stack of challenges and less funding to capitalize on opportunities.

Culture

- Longer stays, lower frequency. As COVID-19 restrictions ease, longer trips and unique destinations are becoming more popular to make up for vacations missed in 2020.

Sports

- In 2022, the Sports Commission is planning for a return of international events. These events have been the most vulnerable due to the pandemic

Film & Television

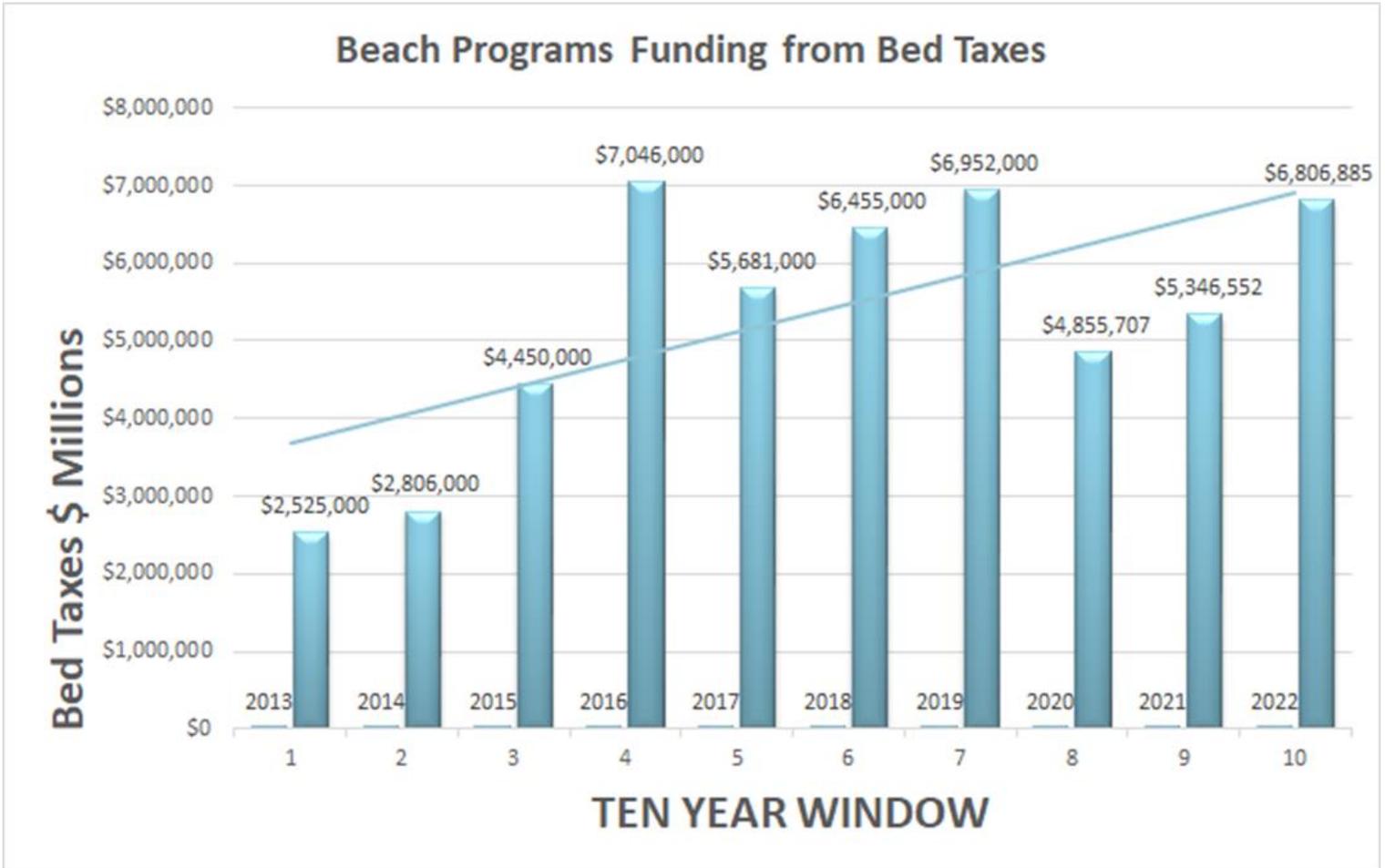
- Uncertainty about the future of health, safety and economic recovery due to COVID-19 and the emergence of its subsequent variants will limit the film and television industry's ability to produce large-scale, high-impact productions.

Convention Center

- COVID-19 surges and variants have played havoc on the convention center event schedule throughout the fiscal year. Millions of dollars of business was postponed or cancelled during the year and moved to future years or lost from the rotation of certain groups.



Tourism Taxes Invested in PBC Public Beaches



**Actual 2021
\$5.3 Million**

**Adopted Budget
2022 - \$6.8
Million**



2021 Tourism Infrastructure Investments

- The 1st and 4th Cent TDT available funds provide for debt service, construction, replacement and refurbishment of tourism generating assets.
- The 1st and 4th Cent revenues were \$17 Million in 2021, with Actual expenditures at \$20 Million, decreasing our 1st and 4th Cent reserve position to \$15 Million. Our 2022 Forecast will improve our Reserves and allow for resuming some key investments.
- Maintaining this level of reserves for these two pennies to cover contracted financial debt service commitments along with funding renewal and replacement of tourism constructed assets is critical.
- Our overall Tourism Strategy of Marketing, Promotion, Beach Renourishment and providing Grants to grow the Tourism Industry in Palm Beach County is dependent upon utilizing all six cents of TDT collected annually, while maintaining appropriate levels of reserves.





DISCOVER
THE PALM BEACHES
TELEVISION

ThePalmBeaches.TV



FILM AND
TELEVISION
COMMISSION



**THE PALM BEACHES
OWN STREAMING
TV CHANNEL**

THEPALMBEACHES.TV



DISCOVER
THE PALM BEACHES
FLORIDA

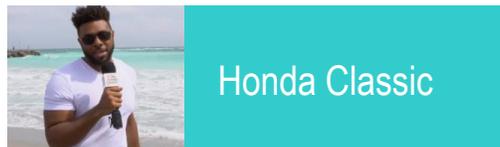
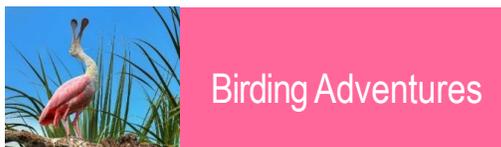
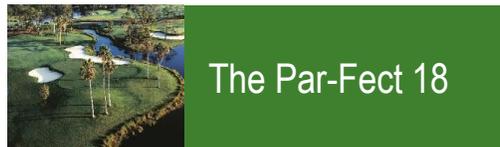
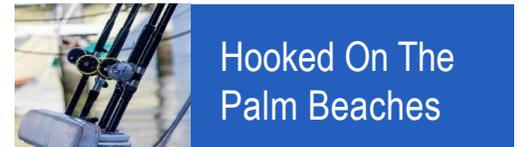
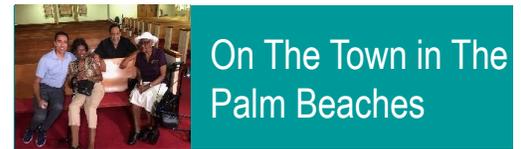
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