



CSL

PALM BEACH COUNTY MASTER PLAN RESIDENT & PART TIME RESIDENT SURVEY

MAY 2025

OBJECTIVE

CSL surveyed more than 1,700 Palm Beach County (PBC) residents and part-time residents to evaluate their satisfaction with local tourism-related services, quality-of-life factors, and perceptions of the County as both a place to live and a visitor destination. This report presents a detailed analysis of feedback from full-time and seasonal residents, highlighting shared strengths, challenges, and opportunities to improve the alignment between tourism efforts and community well-being.

SUMMARY

This resident and part-time resident survey provides critical insight into how the people who live in or seasonally occupy Palm Beach County perceive its tourism offerings, quality of life, and future development priorities. Respondents overwhelmingly praised the County's natural beauty, weather, and access to beaches and outdoor recreation—features that are viewed as foundational to both resident satisfaction and destination identity. Arts, dining, and cultural experiences were also recognized as meaningful contributors to quality of life.

At the same time, both groups expressed concern over traffic congestion, affordability, and access—particularly when it comes to housing, beach availability, and parking during peak visitation periods. Full-time residents were more likely to highlight long-term challenges like cost of living, infrastructure strain, and limited diversity in cultural amenities. Part-time residents generally viewed the County through a more leisure-oriented lens, with slightly stronger perceptions of quality in areas like dining, nightlife, and retail.

Key considerations that emerge from the data include:

- Palm Beach County's strengths—beaches, climate, scenery, and waterfront lifestyle—are universally recognized and valued by both resident groups.
- Traffic congestion, affordability, and access to beaches and housing are top challenges that influence quality of life and the visitor experience.
- Full-time residents tend to place higher value on education, health and wellness, and civic infrastructure, while part-time residents prioritize leisure-facing amenities.
- There is a strong appetite for enhanced outdoor recreation, cultural programming, and year-round attractions that support both resident use and tourism appeal.
- Part-time residents are more likely to engage with The Palm Beaches TV and view tourism assets through a curated, visitor-like perspective, while full-time residents focus more on daily-use infrastructure and livability.
- Social media engagement is high across both groups, offering an opportunity to activate residents as ambassadors and content sharers for the destination.

KEY DEMOGRAPHICS

- Full-time residents skew younger than part-time residents, with 41 percent aged 65 or older compared to 58 percent of part-time residents. In total, 62 percent of full-time residents and 80 percent of part-time residents are over the age of 55.
- The survey population is predominantly White or Caucasian, accounting for 80 percent of full-time residents and 92 percent of part-time residents. African American residents represented seven percent of the full-time sample; all other groups comprised less than three percent each.
- Household sizes are relatively small across both groups. Full-time resident households average 1.89 adults and 0.52 children, while part-time residents average 1.86 adults and 0.43 children.
- Income levels are high overall. Among full-time residents, 46 percent report household incomes of \$100,000 or more annually, including 17 percent earning over \$200,000. Part-time residents are even more affluent—58 percent earn over \$100,000 and 31 percent exceed \$200,000.
- Full-time residents are more likely to be employed. Half (50 percent) report full-time employment, while 34 percent are retired. In contrast, a majority of part-time residents (53 percent) are retired, and only 30 percent are employed full-time.
- Both groups report professional diversity. Among full-time residents, leading employment sectors include government (15 percent), business and professional services (14 percent), and healthcare (10 percent). Part-time residents are more concentrated in finance, business services, and healthcare.
- A strong majority of both groups do not report living with a disability—81 percent of full-time and 79 percent of part-time residents selected “none.” The most commonly reported challenges involved mobility and hearing.
- Full-time residents are more likely to identify as female (67 percent) than male (31 percent), while part-time residents show a more balanced gender split (53 percent female, 44 percent male).

THEIR LIFE IN PALM BEACH COUNTY

- Full-time residents are widely distributed across the County, with notable shares in West Palm Beach, Boynton Beach, Boca Raton, and Palm Beach Gardens. In contrast, part-time residents are heavily concentrated in coastal communities, with 29 percent residing in the Town of Palm Beach alone.
- Two-thirds of full-time residents (66 percent) have lived in Palm Beach County for more than 10 years, compared to 41 percent of part-time residents. Conversely, part-time residents are more likely to be newer to the area—22 percent have lived in the County for two years or less.
- When asked to identify the County's strengths as a place to live, work, and play, residents emphasized the weather, beaches, outdoor activities, and access to cultural and dining experiences. Full-time residents more often cited structured amenities like parks and civic infrastructure, while part-time residents highlighted aesthetics, safety, and livability.
- Traffic congestion, cost of living, and a lack of affordable housing were among the most frequently cited challenges by both groups. Full-time residents voiced greater concern over affordability and infrastructure strain, while part-time residents focused more on congestion and parking.
- Both groups identified beaches, restaurants, shopping, and cultural institutions as key strengths for visitors. Residents were more likely to list museums, festivals, and nature-based attractions, while part-time residents emphasized Palm Beach itself, dining, and coastal experiences.
- As a place to visit, top concerns included traffic, expensive accommodations, and seasonal overcrowding. Residents expressed frustration with infrastructure impacts and crowding, while part-time residents noted limited parking, construction, and high costs.
- Staycation participation was modest across both groups. Twenty-four (24) percent of full-time residents and 21 percent of part-time residents reported staying overnight in a Palm Beach County hotel in the past year.
- When visiting local attractions on their own, residents frequently cited the Kravis Center, Lion Country Safari, Palm Beach Zoo, and Mounts Botanical Garden. Part-time residents were more likely to mention beaches and general destinations than specific venues.
- When hosting out-of-town guests, both groups pointed to beaches, restaurants, and Palm Beach as top destinations. Residents were more likely to include cultural institutions, while part-time residents focused more on iconic shopping and dining districts.
- Popular suggestions for future attractions included more parks and nature trails, improved beach access and amenities, waterfront activation, and year-round cultural or entertainment venues. Full-time residents emphasized walkability, recreation, and family-friendly options. Part-time residents favored enhanced beachfront infrastructure and upscale experiences.
- Social media usage is high across both groups. Eighty-four percent of residents and 77 percent of part-time residents use social platforms. Among these users, 84 percent of residents and 81 percent of part-time residents reported taking at least one action related to Palm Beach County—such as following a tourism account, clicking through a link, or sharing travel content.

THEIR PERCEPTIONS

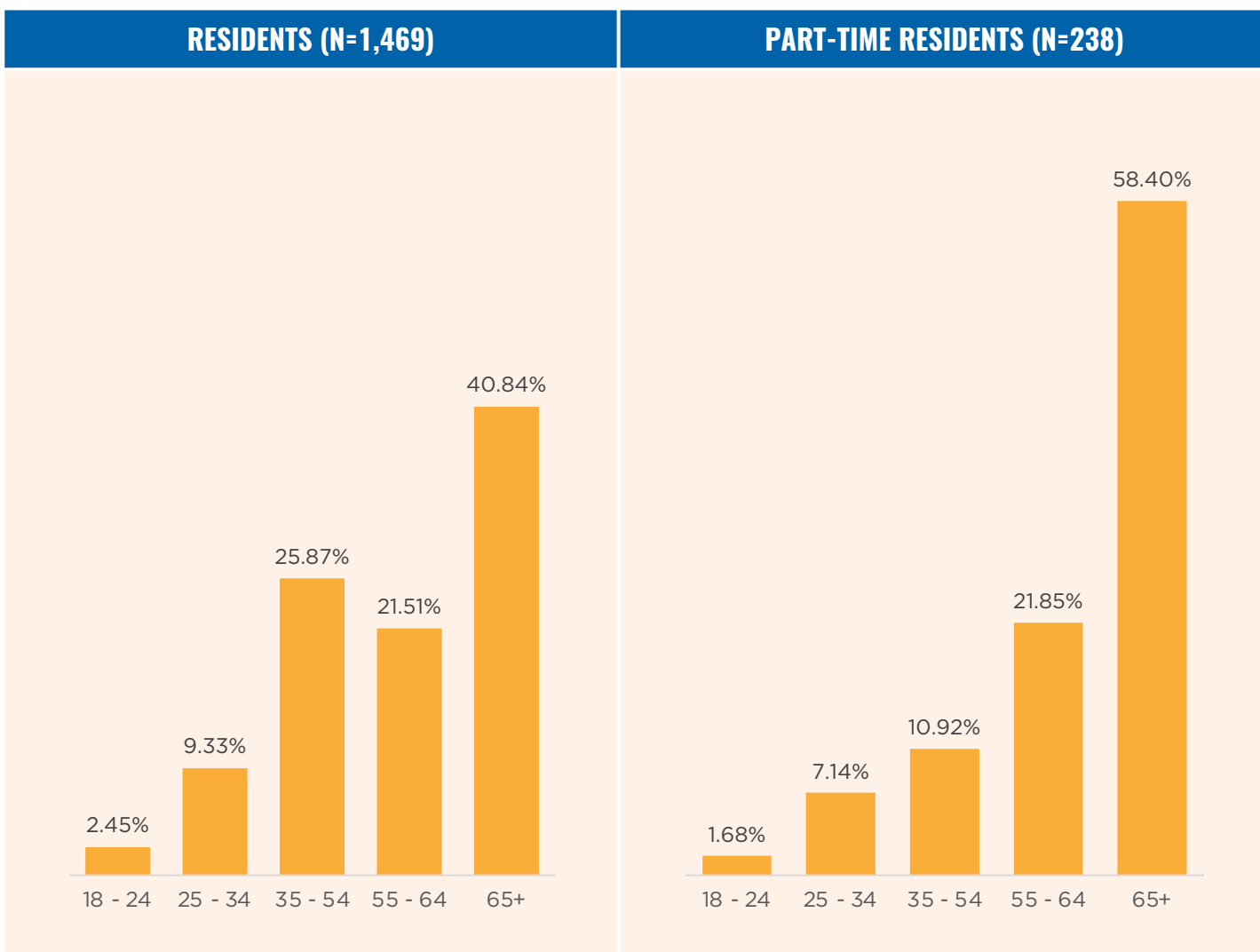
- Most residents feel beach access is sufficient, but some—particularly full-time residents—believe that visitor congestion reduces accessibility. Among full-time residents, 21 percent disagreed that locals have sufficient access, while another 19 percent specifically noted that visitors create barriers.
- The beach environment is viewed positively. More than 80 percent of both full-time and part-time residents rated cleanliness and safety as either Excellent or Good.
- Access to outdoor recreation is generally well-rated. Fifty-one percent of full-time residents and 44 percent of part-time residents believe they have sufficient access, with relatively few reporting concerns related to visitor interference.
- Perceptions of public sports and recreation facilities were favorable, with more than 70 percent of both groups rating them Good or Excellent.
- While nightlife and entertainment options are viewed as adequate, full-time residents expressed more dissatisfaction. One in four rated the number of options as Fair or Poor, and one in three rated the quality of those experiences as only average or below.
- Residents were reserved in their evaluations of casual dining. Just over half rated the abundance and quality of affordable dining as Excellent or Good, while around 30 percent selected Fair. Part-time residents were more favorable in both abundance and quality.
- Perceptions of fine dining were consistently strong. More than 80 percent of both groups rated the availability and quality of upscale dining as Good or Excellent, reinforcing this segment as a standout strength.
- Only 18 percent of both groups believe enough is being done to promote local and farm-to-table cuisine. Awareness of these efforts appears limited, and many selected “Not Sure.”
- Retail experiences received moderately favorable ratings. While the majority rated both the abundance and quality of retail as Good or Excellent, a substantial minority—particularly among full-time residents—expressed dissatisfaction with affordability and local relevance.
- Museum variety and quality were rated positively, though full-time residents were slightly more likely to suggest the need for greater diversity. Nearly 80 percent of both groups rated museum quality as Good or Excellent.
- Performing arts venues were rated favorably in terms of both variety and quality, though full-time residents were more likely to suggest room for growth in programming or geographic coverage.
- Arts and cultural events were also viewed positively, with about three-quarters of residents rating both variety and quality as Good or Excellent. However, full-time residents were more likely to express a desire for broader offerings.

THEIR PERCEPTIONS (continued)

- While nearly half of full-time residents do not interact with The Palm Beaches TV, 27 percent rated it as at least “somewhat valuable.” Part-time residents were more engaged and more likely to view the channel favorably—largely due to fewer selecting “I don’t watch.”
- When asked to rate the importance and quality of specific aspects of the destination, both full-time and part-time residents placed Beaches, Weather/Climate, Scenic Beauty, Dining, and Outdoor Recreation in the top-right quadrant—high in both value and delivery.
- Full-time residents were more critical of infrastructure-related elements such as transportation, nightlife, and educational offerings. Part-time residents offered stronger quality ratings for high-visibility categories such as shopping, waterfront access, and hotels.

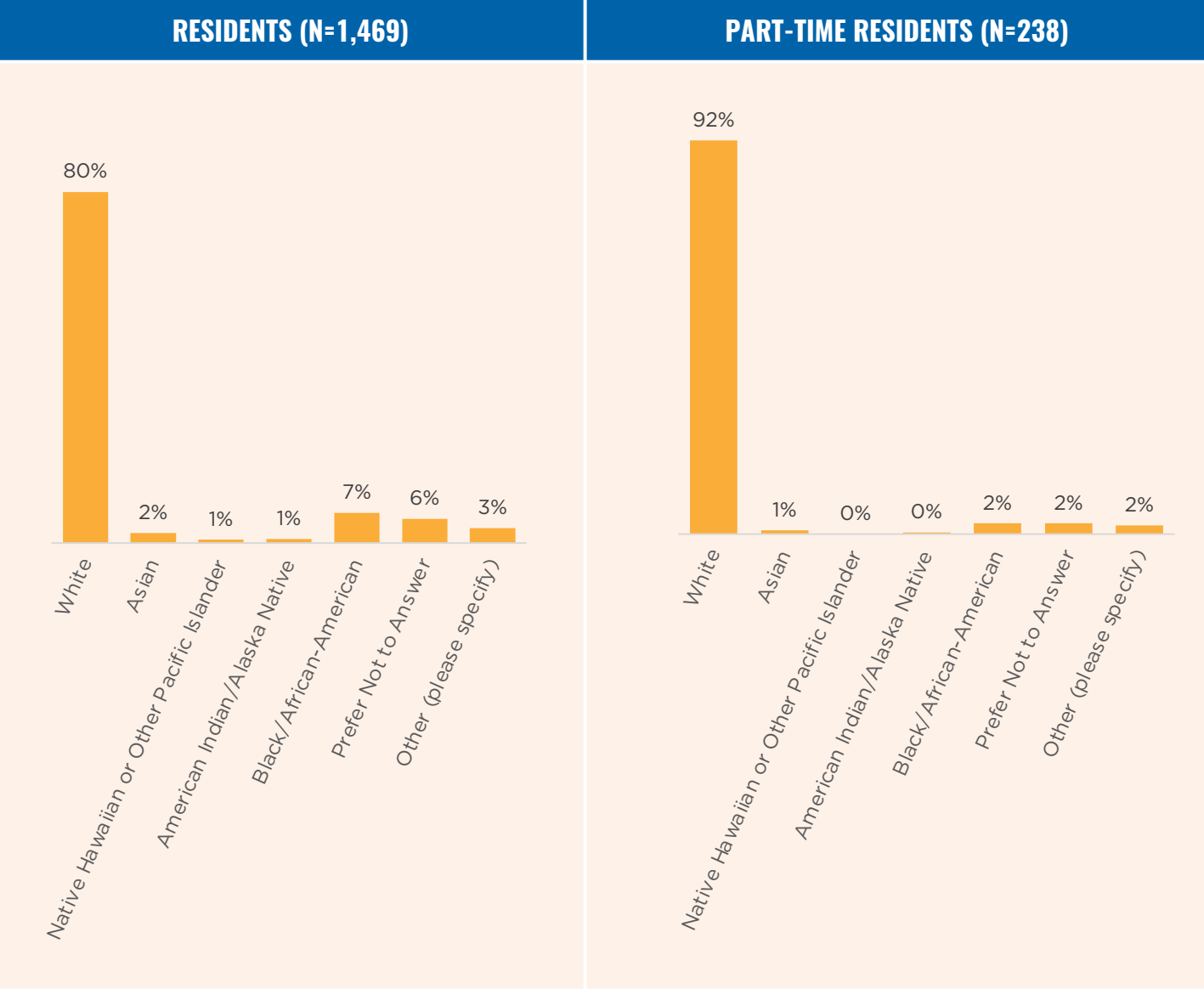
Q1. PLEASE INDICATE YOUR AGE GROUP

CSL surveyed Palm Beach County residents and part-time residents regarding various demographic characteristics, beginning with age group. Approximately 41 percent of resident respondents reported being 65 or older, and 62 percent were over the age of 35. Part-time residents skewed older, with 58 percent aged 65 or above. On average, full-time residents are younger than both visitors, 75 percent of whom are over the age of 55, and part-time residents, 80 percent of whom are over 55. Long-term planning and community engagement efforts—particularly those related to tourism infrastructure, events, and mobility—should continue to account for the needs and preferences of older adults, who make up a significant share of both the full- and part-time resident populations.



Q2. TO MAKE SURE WE ARE REPRESENTING THE VIEWS OF A BROAD MIX OF PEOPLE, PLEASE INDICATE THE ETHNIC / RACIAL GROUP TO WHICH YOU BELONG (CHECK ALL THAT APPLY)

The full-time resident survey respondent pool comprises primarily White or Caucasian individuals, who accounted for 80 percent of responses. African American residents represented seven percent of the sample, while all other racial and ethnic groups each accounted for less than three percent. Among part-time residents, the racial composition was even less diverse—92 percent identified as White or Caucasian, with no other racial/ethnic group exceeding two percent of the respondent pool.



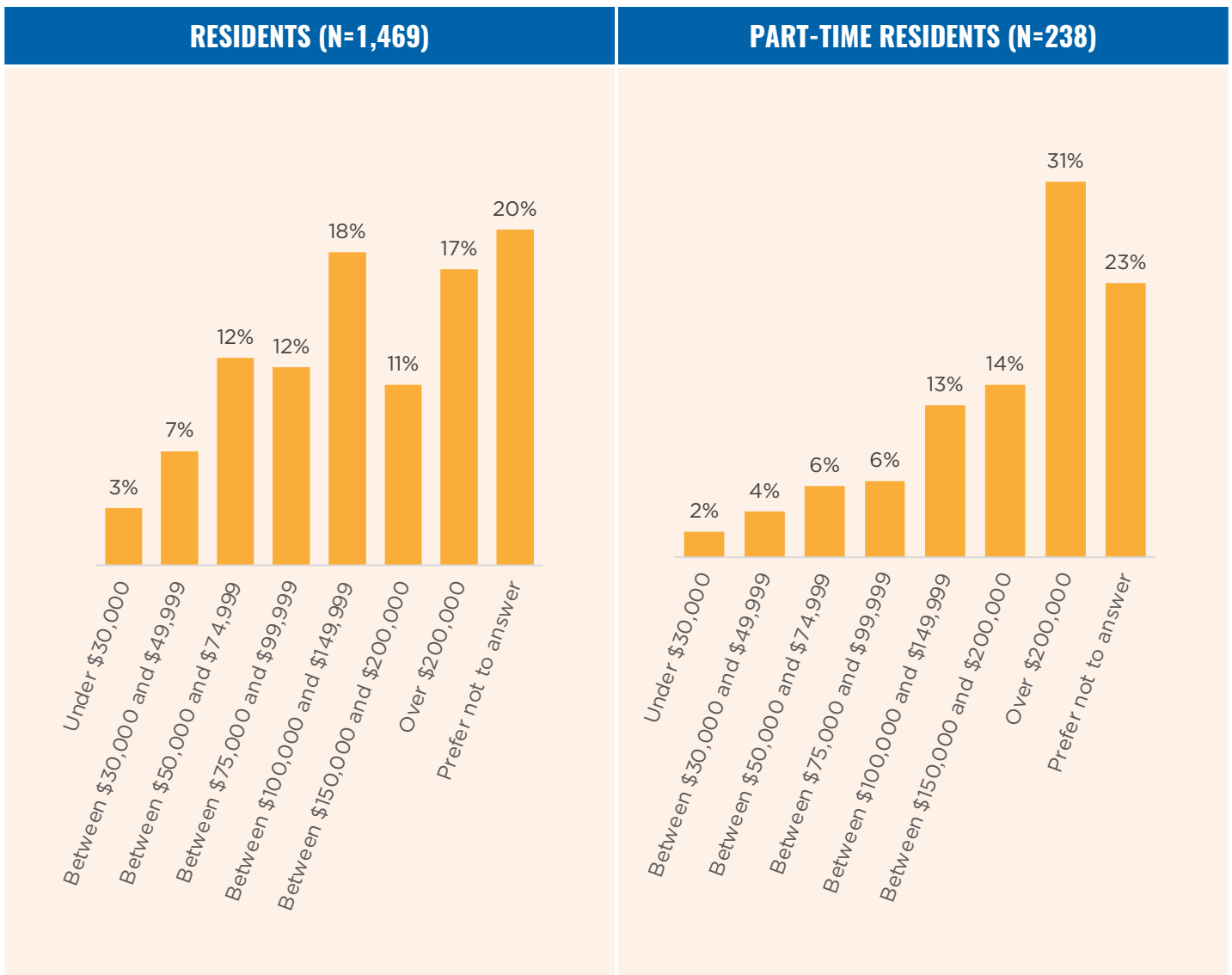
Q4. INCLUDING YOURSELF, HOW MANY ADULTS AND CHILDREN 18 YEARS OR YOUNGER LIVE IN YOUR HOUSEHOLD?

Respondents were also asked to report the number of adults and children in their household. Among full-time residents, the average household includes 1.89 adults and 0.52 children. Part-time resident households are slightly smaller on average, with 1.86 adults and 0.43 children. These figures align closely with the visitor survey findings, which showed 2.0 adults and 0.42 children per travel party, and further reinforce the overall profile of Palm Beach County as a destination and community primarily composed of older adults and smaller household units, with limited representation of families with children across all groups.



Q5. WHICH OF THESE RANGES INCLUDES YOUR TOTAL ANNUAL HOUSEHOLD INCOME, BEFORE TAXES, IN 2024?

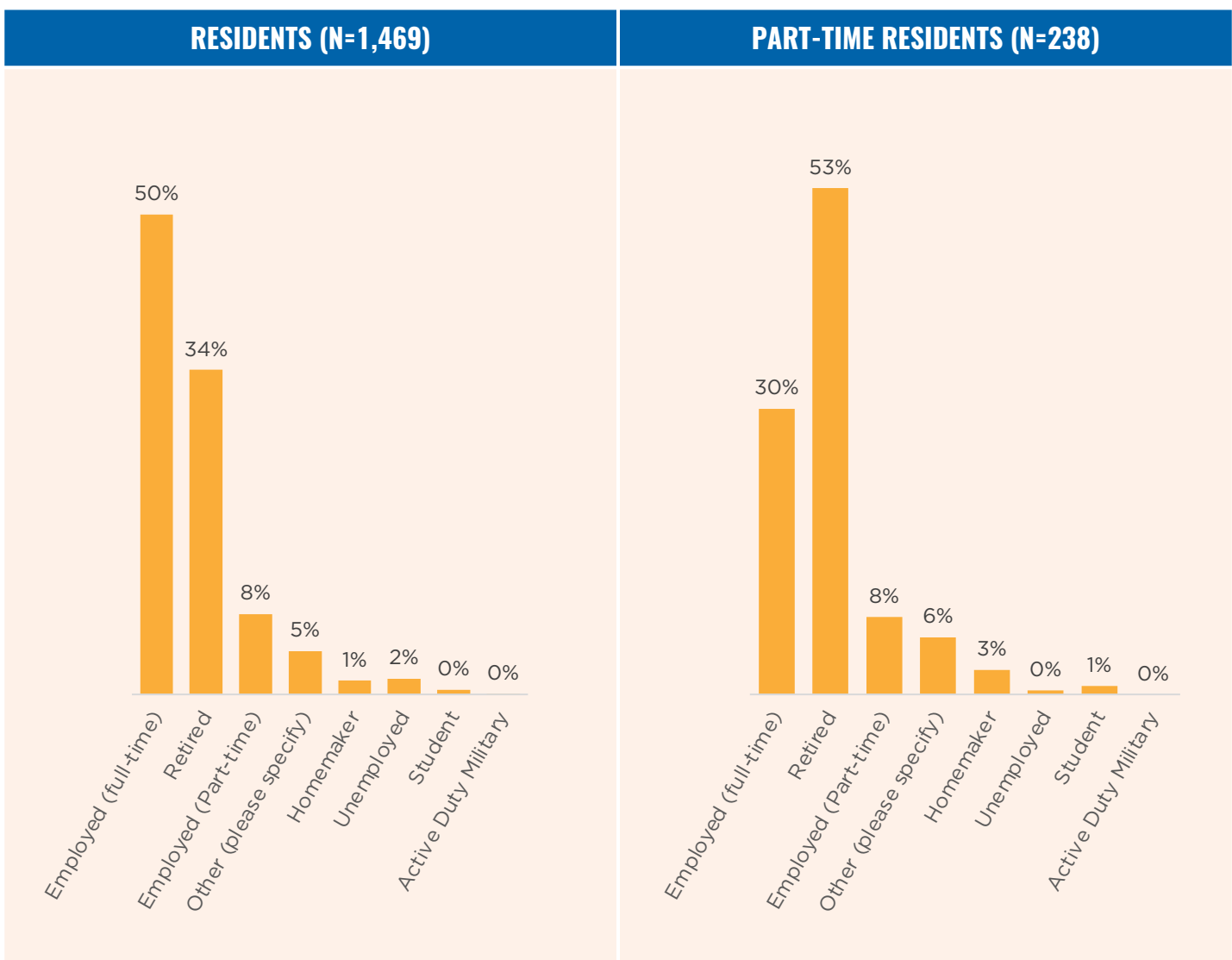
Palm Beach County’s full- and part-time resident populations, as represented by this survey sample, also reflect relatively high household income levels. Among full-time residents, 46 percent reported household incomes of \$100,000 or more annually—including 17 percent earning over \$200,000. Part-time residents skew even more affluent. Nearly one-third (31 percent) reported household incomes exceeding \$200,000, and a combined 58 percent reported earnings above \$100,000. Only 12 percent reported household incomes below \$75,000. Compared to the visitor sample—where 44 percent reported incomes over \$100,000—part-time residents appear to be the most affluent group overall. As with the visitor data, these results may reflect a degree of self-selection bias, particularly among higher-income respondents, but nonetheless highlight the strong economic profile of Palm Beach County’s residential base.



Q6. WHAT IS YOUR CURRENT EMPLOYMENT STATUS?

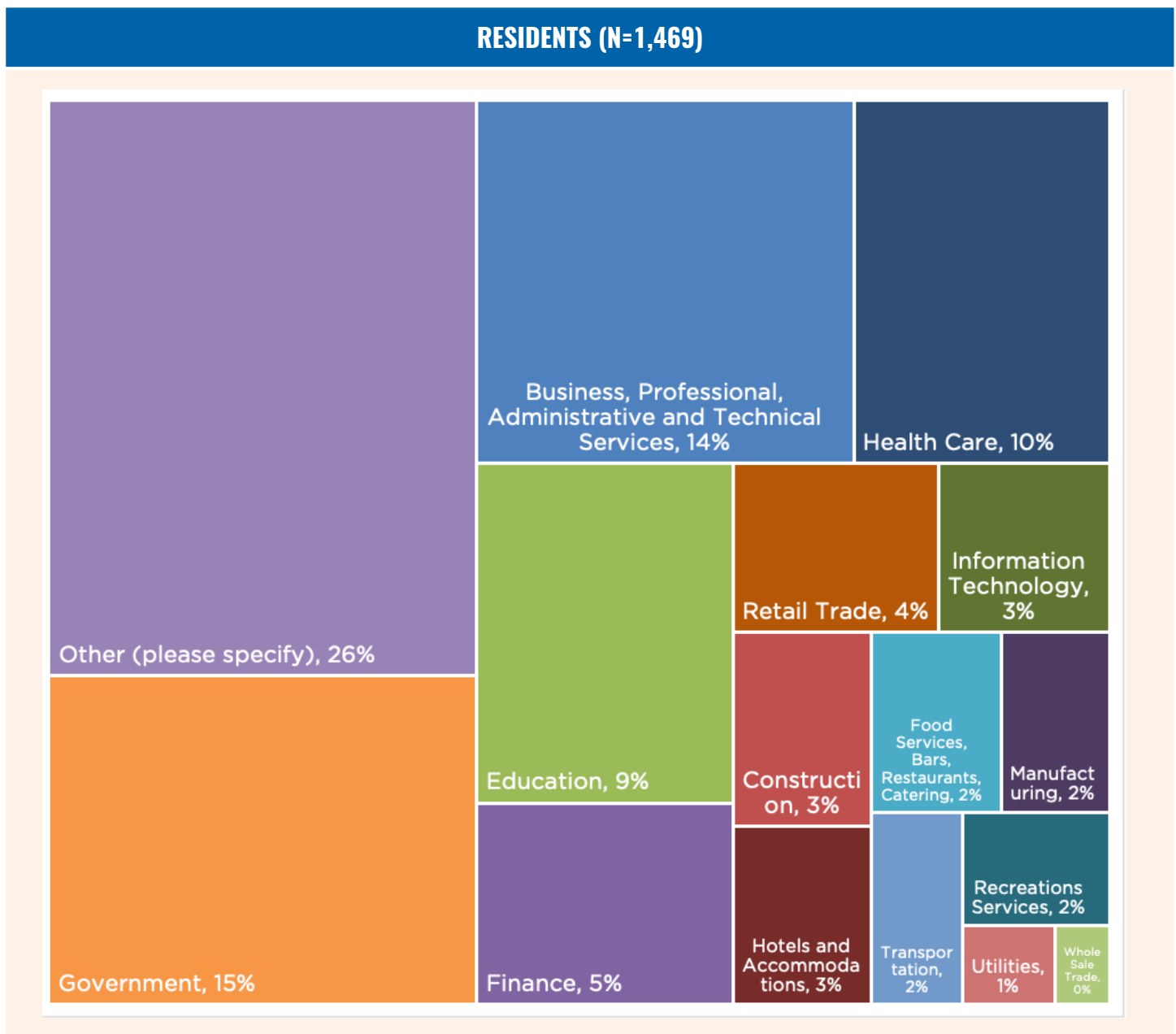
CSL also asked Palm Beach County full-time and part-time residents to report their current employment status. Among full-time residents, half (50 percent) indicated they are employed full-time, with an additional eight percent employed part-time. Retirees made up 34 percent of this group, highlighting the County's mix of working professionals and retirees.

Part-time residents skewed more heavily toward retirement—53 percent identified as retired, while 30 percent reported full-time employment and eight percent part-time employment. These findings reinforce the contrast between the more actively employed full-time resident base and the more leisure-oriented profile of part-time residents, and also reflect a shift from the visitor pool, where retirees and full-time employees were more evenly balanced.



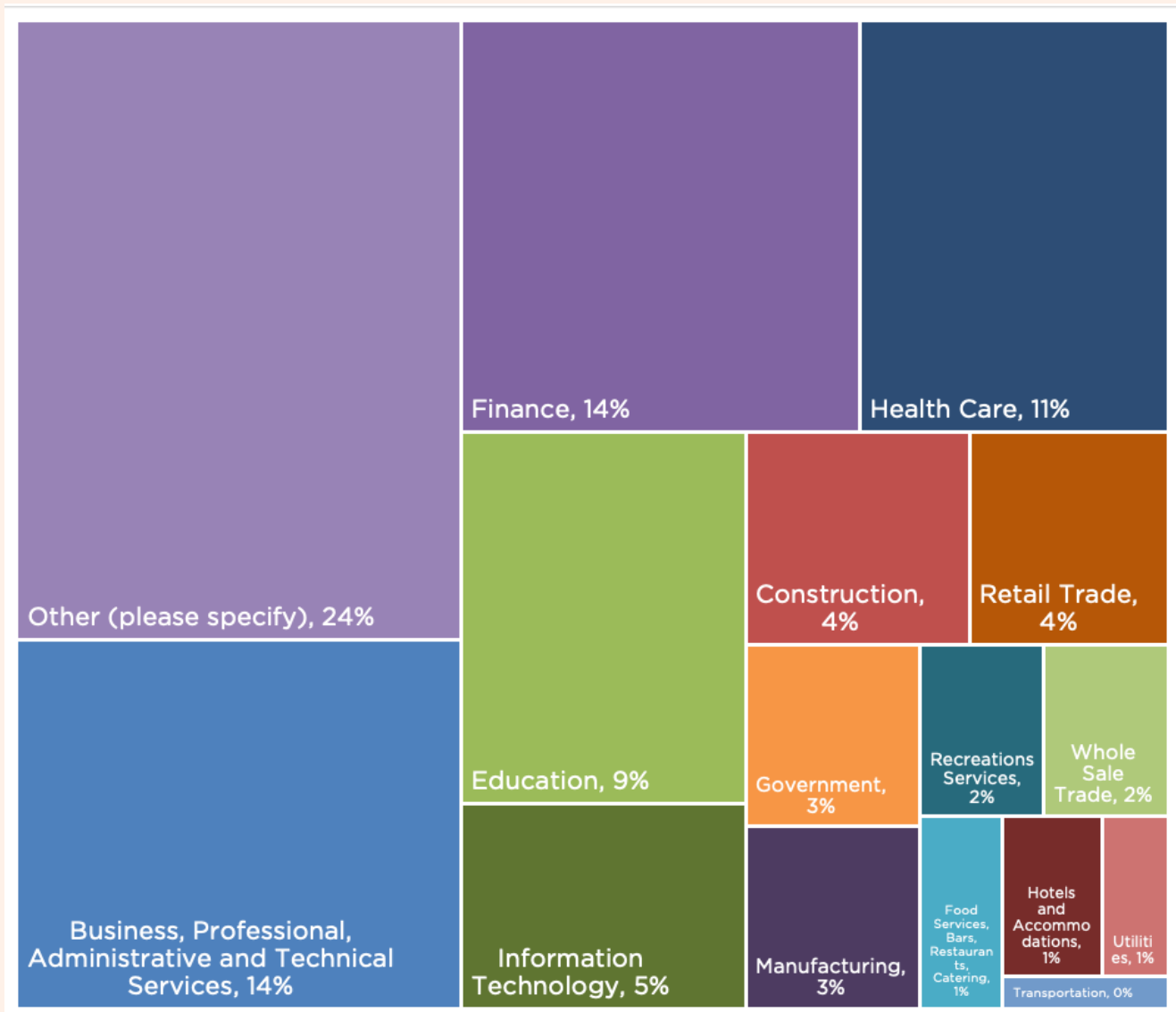
Q7. WHICH OF THE FOLLOWING BEST CHARACTERIZES THE INDUSTRY IN WHICH YOU ARE EMPLOYED?

Full-time residents were asked to indicate the primary industry in which they are employed. Among predefined options, key sectors included Government (15 percent), Business, Professional, Administrative, and Technical Services (14 percent), Health Care (10 percent), and Education (nine percent). Additional industries with meaningful representation included Finance (five percent), Retail Trade (four percent), and Information Technology (three percent). Overall, the data reflect a professionally diverse residential population, with representation across both public- and private-sector fields, and notable employment in high-skill and service-oriented industries.



Part-time residents were also asked to identify their primary industry of employment. Among those who responded, the most commonly selected predefined sectors included Business, Professional, Administrative, and Technical Services (14 percent), Finance (14 percent), and Health Care (11 percent). Education accounted for 9 percent of responses, followed by Information Technology (5 percent), Construction (4 percent), and Retail Trade (4 percent). While the part-time resident base reflects a similarly broad professional profile to full-time residents, it features slightly higher representation in finance and lower representation in government roles, suggesting modest differences in occupational trends between the two groups.

PART-TIME RESIDENTS (N=238)



Q8. DO YOU HAVE ANY DISABILITIES? PLEASE SELECT ALL THAT APPLY.

Residents and part-time residents were also asked to report whether they live with a disability. Because this was a “select all that apply” question, categories are not mutually exclusive, and some respondents selected more than one type of disability. Among full-time residents, 81 percent indicated they do not have a disability, while seven percent reported experiencing physical mobility challenges. Hearing, vision, and cognitive impairments were each reported by two to three percent of respondents. Among part-time residents, 79 percent reported no disability, while mobility challenges were more common (nine percent), and six percent identified as having a hearing impairment. These findings reinforce the importance of accessible infrastructure, inclusive design, and the clear communication of available accommodations—particularly for those with mobility or sensory-related needs—across the destination and its residential communities.



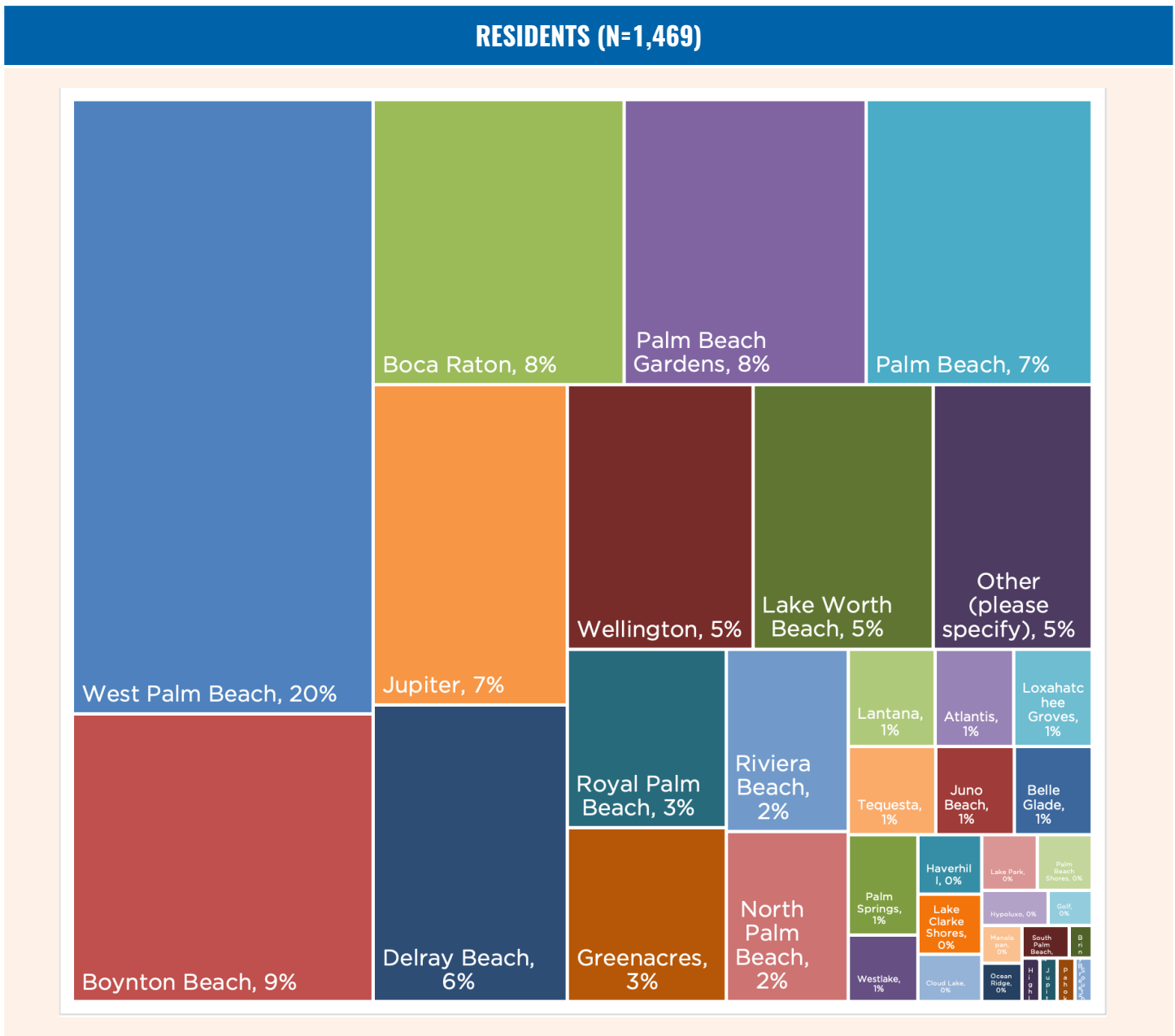
Q9. WHICH GENDER(S) DO YOU IDENTIFY WITH? PLEASE SELECT ALL THAT APPLY.

The gender breakdown among full-time and part-time residents differed slightly from the visitor pool. Among full-time residents, 67 percent identified as female and 31 percent as male, with the remaining two percent identifying as non-binary or choosing not to answer. Part-time residents were more evenly split, with 53 percent identifying as female and 44 percent as male. Compared to the visitor group—which also skewed female at nearly 60 percent—full-time residents showed an even stronger female majority, while part-time residents presented a more balanced distribution.

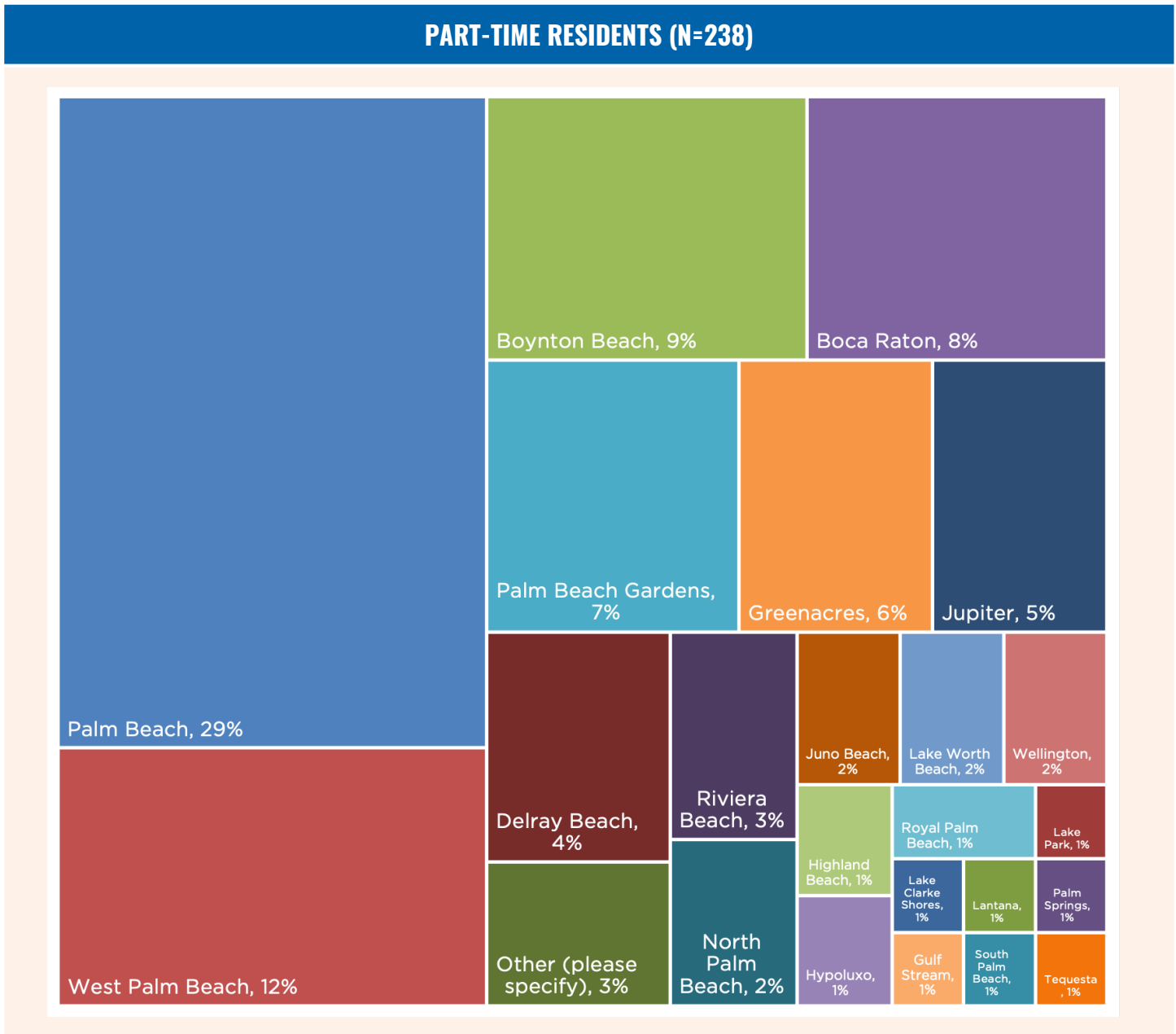


Q15. IN WHICH PALM BEACH COUNTY MUNICIPALITY DO YOU RESIDE?

To understand where surveyed individuals live within Palm Beach County, respondents were asked to indicate their municipality of residence. Among full-time residents, the most commonly reported cities were West Palm Beach (20 percent), Boynton Beach (nine percent), Boca Raton and Palm Beach Gardens (eight percent each), and Palm Beach and Jupiter (seven percent each). These results reflect a broad geographic spread across the County, with notable concentrations in larger urban centers and coastal communities.

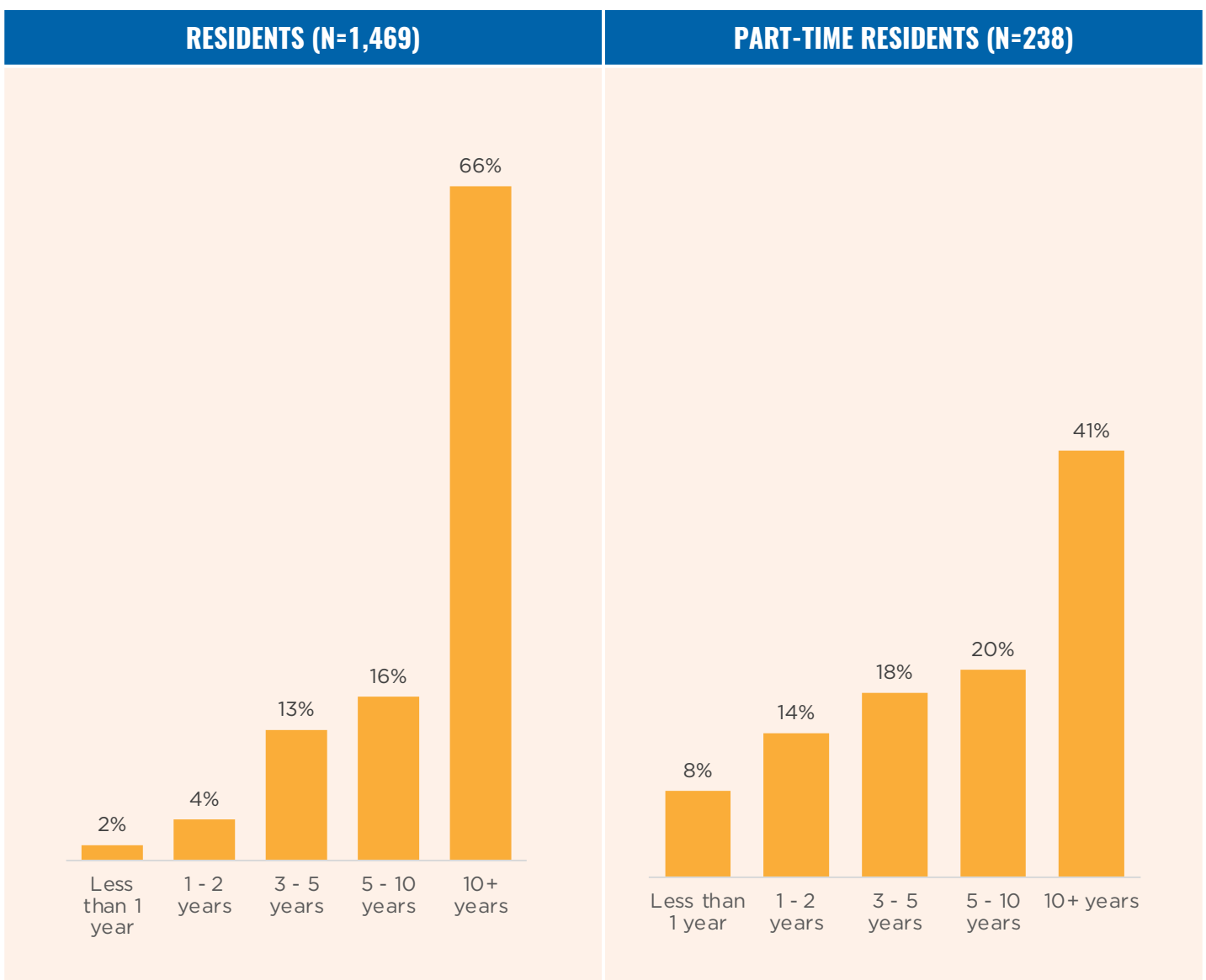


Part-time residents were most heavily concentrated in the Town of Palm Beach, which accounted for 29 percent of responses—more than double the next most common city. West Palm Beach (12 percent), Boynton Beach (nine percent), and Boca Raton (eight percent) also ranked highly, followed by Palm Beach Gardens (seven percent), Greenacres (six percent), and Jupiter (five percent). This distribution suggests that part-time residents are more heavily concentrated in higher-end, coastal municipalities, while full-time residents are more widely distributed throughout the County’s larger suburban and inland communities.



Q16. HOW LONG HAVE YOU LIVED IN PALM BEACH COUNTY?

Respondents were also asked how many years they have resided—or seasonally resided, in the case of part-time residents—in Palm Beach County. Approximately 66 percent of full-time residents indicated they have lived in the County for more than 10 years. This is significantly higher than the share of part-time residents, only 41 percent of whom reported a tenure of 10 years or more. Conversely, 22 percent of part-time residents have lived in the County for two years or less, compared to just 6 percent of full-time residents. These findings suggest that full-time residents tend to have deeper, long-term ties to the community, while part-time residents represent a more recent and potentially more transient population.



Q17. PLEASE COMMENT ON THE CHARACTERISTICS OF PALM BEACH COUNTY YOU FEEL ARE **STRENGTHS OF THE AREA AS A PLACE TO LIVE, WORK AND PLAY. (OPEN-ENDED)**

Palm Beach County residents—both full-time and part-time—overwhelmingly associate the destination’s strengths with its natural environment, lifestyle amenities, and year-round climate.



TOP THEMES ACROSS BOTH GROUPS

- **Weather and Climate:** “Weather” was the single most frequent word, mentioned by both groups, signaling strong appreciation for the area’s warm, temperate conditions.
- **Beaches and Parks:** Beaches, parks, and outdoor recreation (e.g., “activities,” “nature,” “access”) were widely cited, indicating strong alignment with the county’s natural resource appeal.
- **Dining and Culture:** “Restaurants,” “entertainment,” and “cultural” references underscore the value of lifestyle amenities that support both residents and visitors.
- **Community Appeal:** Words like “safe,” “clean,” and “nice” speak to a perceived quality of life and public environment that residents value.

RESIDENTS VS PART-TIME RESIDENTS

- Residents appear more likely to cite structured recreational infrastructure (parks, events, outdoor spaces) and civic amenities.
- Part-time residents place more relative emphasis on aesthetics and livability—terms like “clean,” “safe,” and “beautiful”—which may reflect a more touristic or seasonal lens.
- Both groups strongly align on the climate and coastal lifestyle as key draws.

OPPORTUNITIES & STRATEGIC IMPLICATIONS

- Preserve and enhance access to parks, beaches, and outdoor activities, as these are universally praised by both resident groups.
- Invest in cultural programming and dining/entertainment offerings to retain local appeal and enhance the visitor experience.
- Maintain and market the clean, safe, and visually appealing environment, which appears especially important to part-time residents and supports quality-of-life messaging.

RESIDENTS VS PART-TIME RESIDENTS

- Residents expressed deeper concern about affordability and infrastructure strain, likely due to their income levels and daily exposure to local costs, commuting, and housing pressures.
- Part-time residents echoed concerns over traffic, but tended to emphasize transient challenges like parking, insurance, and drivers—issues experienced episodically or seasonally.
- While both groups acknowledge rapid growth and development, full-time residents are more affected by its cumulative economic and infrastructural effects.

OPPORTUNITIES & STRATEGIC IMPLICATIONS

- **Transportation Planning:** Addressing traffic congestion and improving public transit is a critical opportunity for improving resident quality of life and sustaining tourism growth.
- **Affordable Housing Strategy:** Rising housing costs are a major pain point for full-time residents and could affect workforce sustainability and retention.
- **Growth Management:** There's a clear call for balanced development that doesn't overwhelm infrastructure or erode livability.
- **Visitor Management & Parking:** For part-time residents and tourists, convenience-related concerns like parking availability and driver behavior could inform wayfinding, signage, and city mobility strategies.

Q19. PLEASE COMMENT ON THE CHARACTERISTICS OF PALM BEACH COUNTY YOU FEEL ARE STRENGTHS OF THE AREA AS A VISITOR DESTINATION. (OPEN-ENDED)

Both full-time and part-time residents strongly associate Palm Beach County's strengths as a visitor destination with its natural beauty, climate, and diverse leisure offerings. The most cited assets center around beaches, weather, restaurants, and cultural/entertainment experiences.



TOP THEMES ACROSS BOTH GROUPS

- **Beaches & Climate:** “Beaches,” “beach,” and “weather” dominate the response set. These continue to be the core identity of the destination.
- **Dining & Shopping:** “Restaurants,” “dining,” and “shopping” received strong mentions, reflecting a high level of satisfaction with culinary and retail options.
- **Activities & Attractions:** Responses highlight a mix of “activities,” “cultural,” “museums,” “golf,” “entertainment,” and “events”—indicating a well-rounded visitor experience.
- **Scenic & Upscale Appeal:** Words like “beautiful,” “great,” and “resort lifestyle” reflect a perception of Palm Beach County as a scenic, luxurious, and refined destination.

RESIDENTS VS PART-TIME RESIDENTS

- Residents provided broader and more detailed lists of visitor-facing strengths, likely informed by regular, first-hand exposure to the area’s amenities and cultural offerings.
- Part-time residents emphasize core amenities (weather, beaches, restaurants), but mention fewer niche attractions or institutions—perhaps reflecting more limited, vacation-style usage of the destination.

OPPORTUNITIES & STRATEGIC IMPLICATIONS

- Reinforce the beach-weather brand while promoting the depth of activities (museums, golf, events) that convert casual visitors into return guests.
- Highlight the culinary and shopping scene as key differentiators, especially since these are recognized by both full-time and part-time residents.
- Continue investing in and promoting cultural institutions and local experiences to support year-round tourism and enhance the destination’s sophistication.
- Consider tailored visitor messaging for short-stay, seasonal travelers, who may not be fully aware of the county’s diverse offerings beyond the coast.

Q20. PLEASE COMMENT ON THE CHARACTERISTICS OF PALM BEACH COUNTY YOU FEEL ARE CHALLENGES OF THE AREA AS A VISITOR DESTINATION. (OPEN-ENDED)

The most common concerns cited by both full-time and part-time residents relate to traffic congestion, parking, and high costs—issues that directly affect the visitor experience. These challenges center around mobility, affordability, and capacity limitations.



TOP THEMES ACROSS BOTH GROUPS

- **Traffic & Transportation:** “Traffic” was the top concern by a wide margin. Many respondents also cited issues with “public transportation,” “lack of transit options,” and “crowded roads.”
- **Parking:** The word “parking” ranked among the top three concerns, reflecting a perceived scarcity or inconvenience for visitors.
- **Affordability:** Terms like “expensive,” “high,” “cost,” and “prices” point to concerns about the overall cost of visiting—particularly for hotels, dining, and activities.
- **Overcrowding:** Words like “crowded,” “people,” and “season” indicate strain during peak visitation periods.
- **Access to Beaches & Attractions:** Some comments mentioned the limited accessibility of beach areas or lack of walkable activities, especially outside resort zones.

RESIDENTS VS PART-TIME RESIDENTS

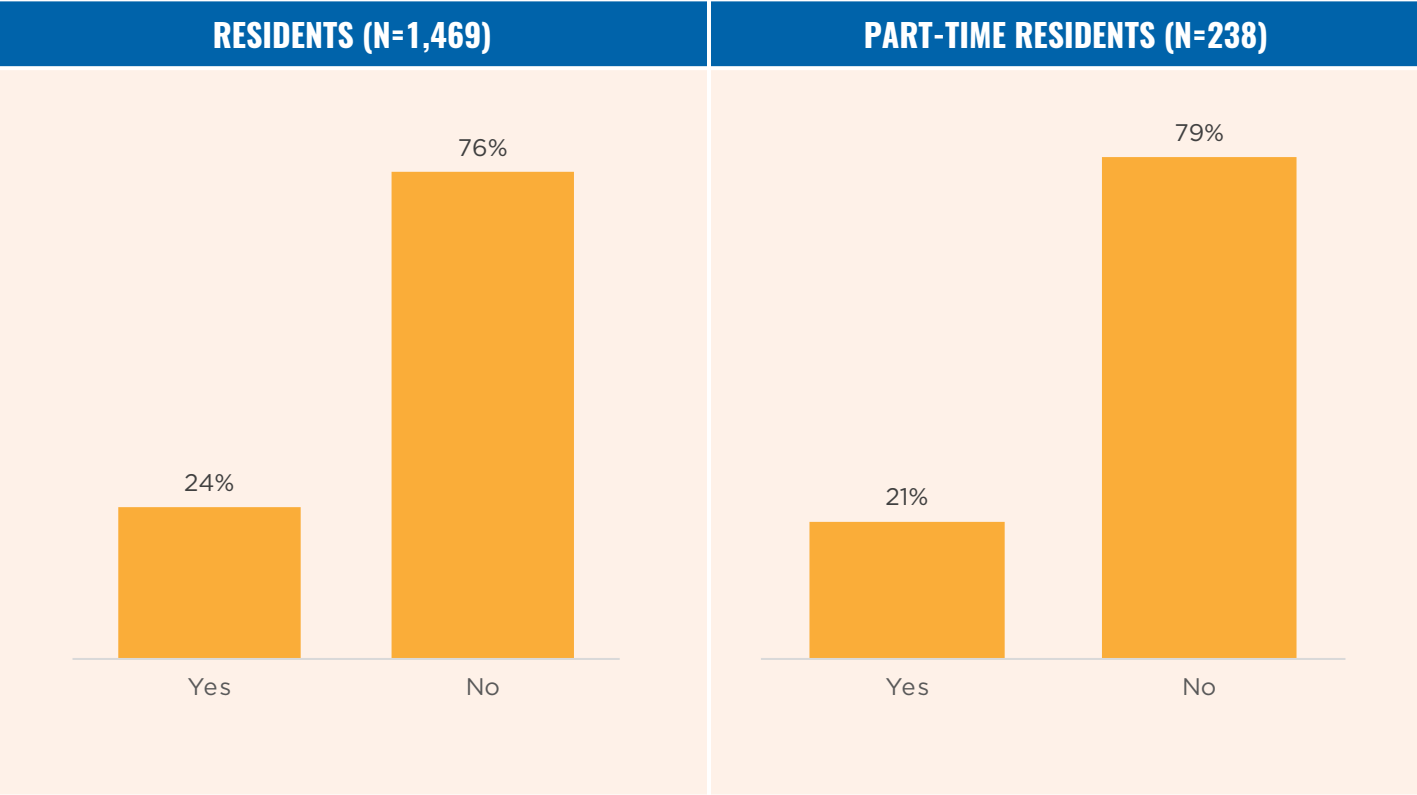
- Residents consistently identify broader infrastructure and affordability issues impacting the visitor experience—likely a result of daily exposure to peak periods and tourist density.
- Part-time residents focus more on surface-level barriers—like hotel price, beach access, and construction—which are immediate and visible during their stays.
- Complaints about mobility (traffic, lack of transit, parking) span both groups and are particularly dominant.

OPPORTUNITIES & STRATEGIC IMPLICATIONS

- **Transportation & Parking Solutions:** There is a pressing need to improve intra-county mobility options (trolleys, shuttles, transit connections), especially in visitor-heavy areas.
- **Cost Transparency & Tiered Options:** Promote value-based travel options (e.g., off-peak packages, free or low-cost experiences) to combat the perception of unaffordability.
- **Destination Management During Peak Season:** Residents in particular are sensitive to overcrowding and seasonal saturation. Consider dispersion strategies (events in shoulder seasons, promoting under-visited areas).
- **Improve Visitor Flow at High-Traffic Destinations:** Increased signage, shuttle access, and real-time parking updates could meaningfully improve experiences at beaches and cultural sites.

Q21. IN THE LAST 12 MONTHS, HAVE YOU TAKEN A STAYCATION AND STAYED ONE OR MORE NIGHTS IN A HOTEL IN PALM BEACH COUNTY?

A majority of both residents and part-time residents reported that they had not taken a local staycation within the past year. Among full-time residents, 24 percent indicated they had stayed at a Palm Beach County hotel for leisure, while 76 percent said they had not. Part-time residents reported slightly lower participation in staycations, with 21 percent saying “yes” and 79 percent responding “no.”



ATTRactions MORE FREQUENTLY CITED BY RESIDENTS

- Kravis Center for the Performing Arts was cited by 8.8% of residents compared to 5.1% of part-time residents, indicating deeper engagement by full-time locals with the performing arts scene.
- Lion Country Safari (3.2% vs. 0.6%) and Palm Beach Zoo (2.3% vs. 1.3%) also had higher relative mention rates among residents, suggesting greater local usage of family-oriented attractions.
- Educational and environmental assets such as Mounts Botanical Garden and Manatee Lagoon showed slightly higher usage rates among full-time residents.

NOTABLE OBSERVATIONS

- Many of the attractions frequently mentioned by full-time residents—Kravis Center, Palm Beach Zoo, Lion Country Safari, and Flagler Museum—are institutions that offer ongoing programming and year-round access, which may align well with permanent lifestyles.
- Part-time residents, while less likely to mention any one venue, may prioritize general experiences (e.g., beachgoing, dining, scenic drives) over named attractions.

STRATEGIC INSIGHTS

- High visitation by locals to venues like the Kravis Center, Palm Beach Zoo, and Lion Country Safari reinforces their dual roles as resident-serving institutions and visitor-facing tourism assets.
- The popularity of outdoor and nature-based attractions suggests continued opportunities to support sustainable and eco-friendly experiences that resonate with both residents and tourists.
- These responses also highlight the importance of supporting year-round programming and accessibility for high-performing venues to strengthen both quality of life and visitor appeal.

Q23. PLEASE LIST WHICH ATTRACTIONS, EVENTS OR EXPERIENCES IN PALM BEACH COUNTY YOU TYPICALLY FREQUENT WITH FRIENDS OR RELATIVES WHO ARE VISITING FROM OUT OF TOWN (OPEN-ENDED).



MOST FREQUENTLY MENTIONED ATTRACTIONS AND EXPERIENCES

Respondents most commonly referenced beaches, restaurants, and general Palm Beach-area landmarks when describing where they take out-of-town guests. Specific high-frequency terms included:

- **“Beach” and “Beaches”:** Combined, these terms were mentioned over 600 times, reinforcing coastal access as the most prominent draw.
- **“Restaurants”:** Dining was the second most common experience cited, often linked with scenic locations such as “on the water,” “Atlantic Avenue,” or “Worth Avenue.”
- **“Palm Beach”:** Frequently mentioned as a destination in and of itself, often without specifying a particular attraction—indicating strong name recognition.
- **Cultural attractions** such as Norton Museum, Morikami Museum, Lion Country Safari, and Mounts Botanical Garden were also cited regularly, though less frequently than general coastal or dining experiences.
- **Other notable mentions** included farmers markets, shopping areas (like Mizner Park and Worth Avenue), and special events or festivals, suggesting visitors value authentic, locally rooted experiences

DIFFERENCES BETWEEN RESIDENT AND PART-TIME RESIDENT RESPONSES

- Residents were more likely to mention structured cultural attractions (e.g., Norton Museum, Morikami, Kravis Center), likely reflecting broader familiarity with the local cultural landscape.
- Part-time residents focused more heavily on iconic and high-visibility locations such as the beach, Palm Beach island, and well-known dining/shopping corridors (e.g., Worth Avenue).
- Both groups overlapped on general experience-based terms like "restaurants," "beaches," and "shopping," but residents showed a slightly broader mix of day-trip venues, festivals, and educational sites.

DIFFERENCES COMPARED TO WHERE LOCALS GO ON THEIR OWN

Compared to the previous question (where residents listed attractions they visit personally), this set of responses shows a clear shift in purpose and audience:

- Locals favor cultural institutions and outdoor spaces for personal use, such as the Kravis Center, Mounts Botanical Garden, and Manatee Lagoon.
- When entertaining guests, the emphasis shifts to more iconic, visually striking, and social experiences—particularly beaches, restaurants, and highly branded districts like Palm Beach or Atlantic Avenue.
- This distinction reinforces the role of some venues as "local treasures" and others as "visitor showcases."

STRATEGIC INSIGHTS

- **Coastal and Culinary Experiences Are Core to the Visitor Identity:** Beaches and waterfront restaurants form the foundation of the "hosted" experience in Palm Beach County. Maintaining access and enhancing amenities in these zones is critical.
- **Cultural Venues Serve Dual Roles and Deserve Continued Investment:** While not as dominant as beaches, museums, gardens, and arts centers serve as strong complements in hosting out-of-town guests. These venues should be supported as year-round assets for both resident engagement and visitor appeal.
- **Destination Branding and Signage Could Guide Visitors to Secondary Experiences:** Many attractions were referenced indirectly (e.g., "Delray," "lighthouse," "museums"), suggesting visitors rely on locals for navigation. Strengthening district-level branding and curated itinerary tools could help amplify these venues.
- **Events and Markets Offer Relatable, Memorable Experiences:** Farmers markets, food festivals, and community events were cited as frequent group activities. These authentic, recurring events offer strong potential for repeat visitation and word-of-mouth promotion.

Q24. AS FUTURE ATTRACTION DEVELOPMENT IN PALM BEACH COUNTY IS BEING EXPLORED, PLEASE SHARE ANY IDEAS YOU MAY HAVE FOR MAJOR ATTRACTIONS THAT YOU BELIEVE WOULD MAKE PALM BEACH COUNTY A MORE APPEALING PLACE TO LIVE, WORK, AND PLAY (OPEN-ENDED).



MOST FREQUENTLY SUGGESTED ATTRACTIONS AND IDEAS

The most common responses fell into a mix of recreation, public realm, and infrastructure-oriented ideas, with clear demand for amenities that enhance livability and visitor experience. Key themes include:

- **Beach Access and Enhancement:** “Beach” and “Palm Beach” were mentioned frequently, often in calls for better public access, cleaner beachfronts, or new beachfront amenities such as boardwalks or piers.
- **Parks and Nature Trails:** A high number of responses called for more or improved parks, walking trails, bike paths, and nature-based recreation—suggesting demand for accessible outdoor spaces.
- **Cultural and Entertainment Venues:** Multiple mentions of museums, live music, amphitheaters, and family entertainment complexes point to a desire for expanded cultural infrastructure and nightlife options.
- **Waterfront and Downtown Activation:** Ideas included expanded waterfront dining, pedestrian zones, riverwalks, and revitalized public squares—indicating strong interest in more vibrant, walkable community spaces.
- **Indoor and All-Ages Entertainment:** Several respondents proposed aquariums, arcades, children’s museums, or interactive science centers, which would appeal to both local families and year-round visitors.

DIFFERENCES BETWEEN RESIDENT AND PART-TIME RESIDENTS

- Residents were more likely to suggest recreational infrastructure improvements—particularly bike and walking trails, parks, and cultural venues—reflecting daily engagement with the county’s built environment.
- Part-time residents emphasized beach enhancements, waterfront experiences, and shopping or dining destinations, aligning with more limited or vacation-style use of the area.

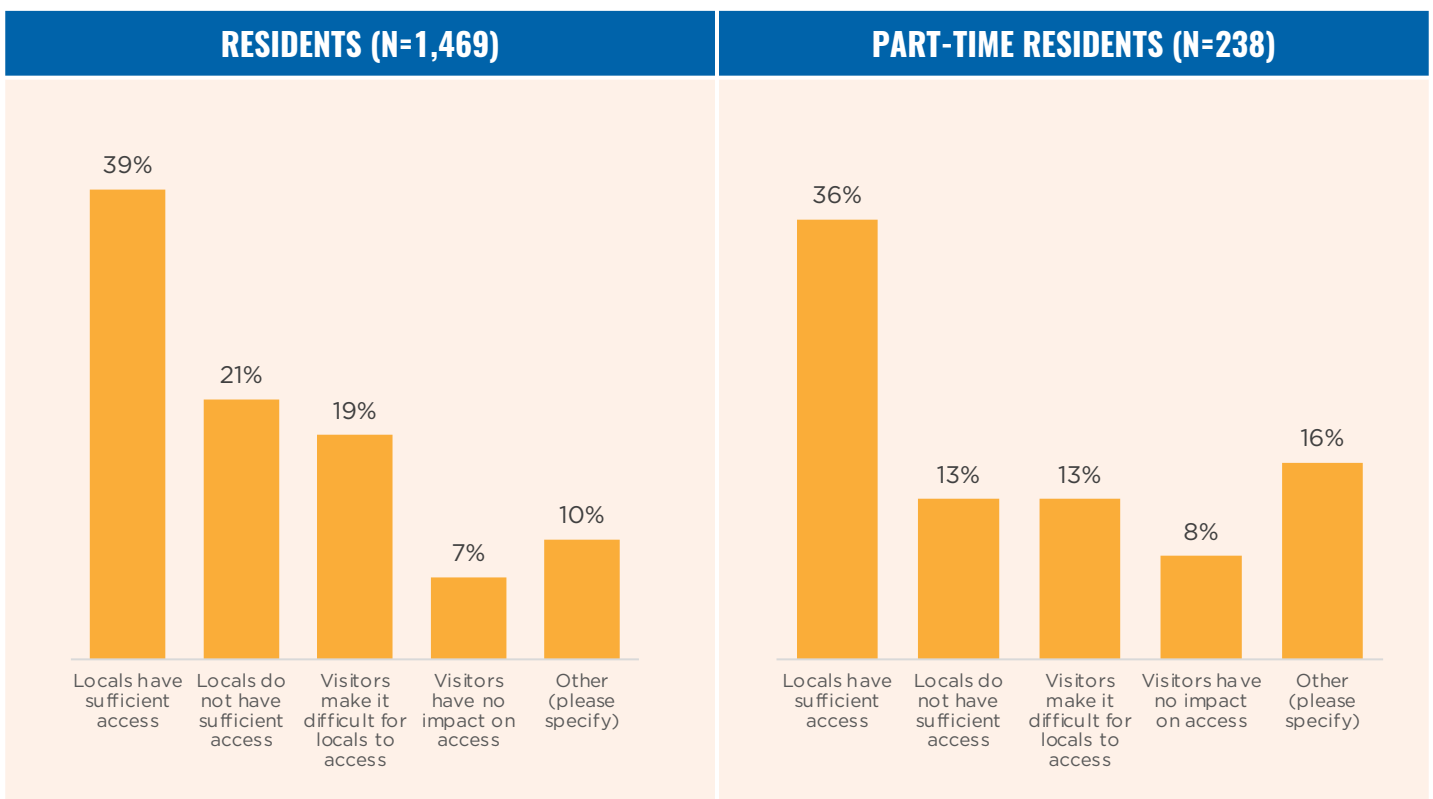
STRATEGIC INSIGHTS

- ***Invest in Everyday Recreation and Public Realm Assets:*** There is strong demand for parks, trails, and bike paths, which serve both locals and tourists. These assets promote health, sustainability, and lifestyle value.
- ***Create Anchor Cultural or Entertainment Attractions:*** The county may benefit from one or more signature venues (e.g., aquarium, amphitheater, large-scale cultural museum) that generate regional draw and broaden the tourism base.
- ***Enhance and Activate Beachfront and Waterfront Areas:*** Proposals for boardwalks, promenades, and improved access reflect untapped potential along the county’s coastlines and waterfront districts.
- ***Support Youth, Family, and Indoor Recreation:*** Requests for family-friendly and weather-resistant options (e.g., trampoline parks, indoor play zones, cultural centers) highlight an opportunity to diversify offerings beyond the beach.
- ***Design for Dual Use—Resident + Visitor Appeal:*** Many suggestions apply to both tourism and resident quality of life. Investments in these dual-purpose attractions will likely see strong public support and use.

Q25. HOW DO YOU FEEL ABOUT BEACH ACCESS IN PALM BEACH COUNTY?

Residents and part-time residents shared their perceptions of beach access in Palm Beach County. Among full-time residents, 39 percent agreed that locals have sufficient access to the beach, while 21 percent disagreed and 19 percent specifically cited that visitors make it difficult for locals to access beach areas. Seven percent felt that visitors have no impact on local access. Part-time residents showed slightly more favorable responses overall: 36 percent indicated that locals have sufficient access, while only 13 percent felt access was insufficient and an equal share (13 percent) pointed to visitors as a barrier. Eight percent of part-time residents believed visitors have no impact on access.

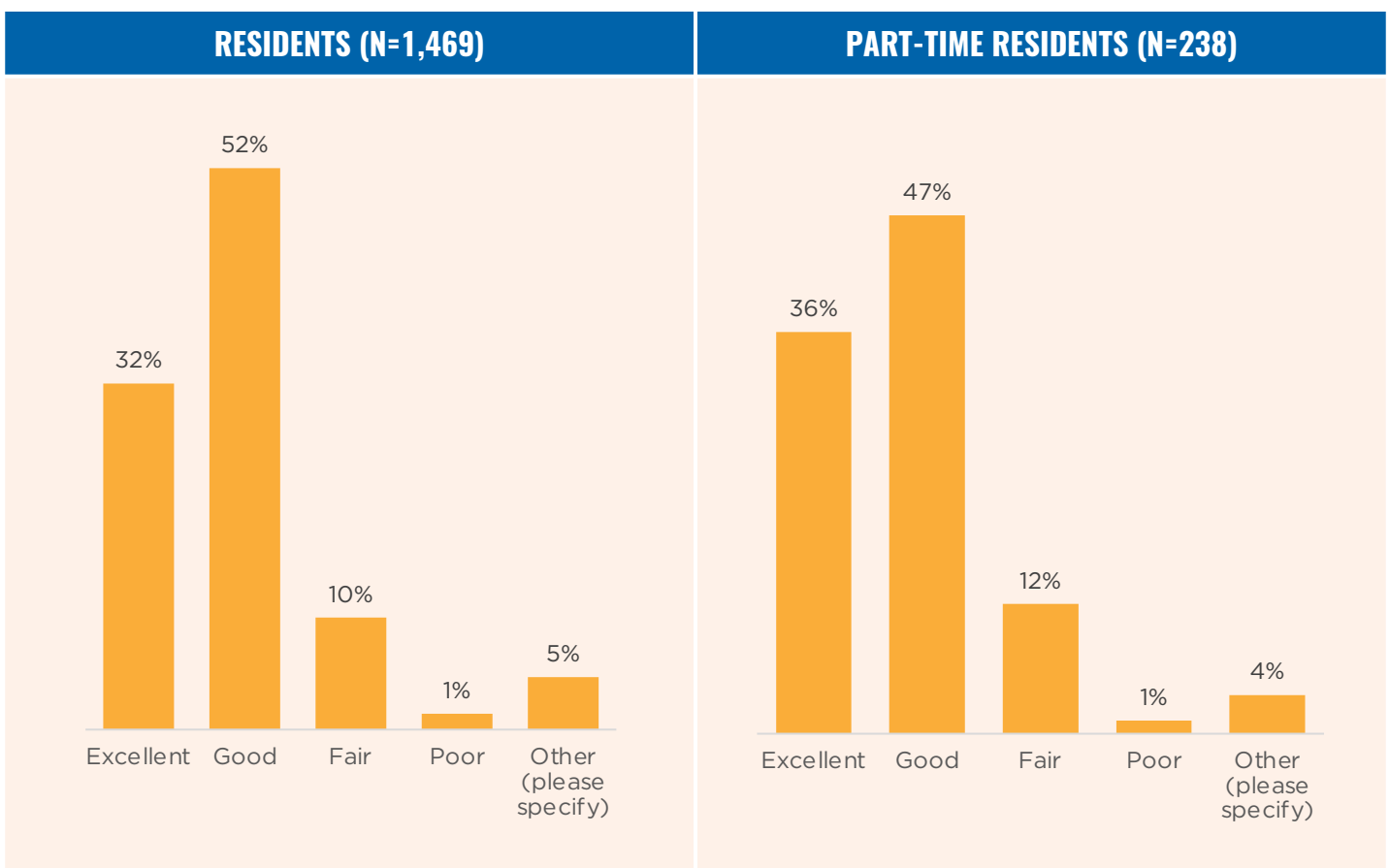
Taken together, these responses suggest that while a plurality of both resident groups feel beach access is adequate, a meaningful segment—particularly among full-time residents—expresses concern about visitor-related congestion or limited availability. This points to the continued importance of managing public access, mobility, and beach capacity in high-demand areas.



Q26. HOW WOULD YOU RATE THE QUALITY OF BEACH ENVIRONMENT (CLEANLINESS, SAFETY) IN PALM BEACH COUNTY?

Residents and part-time residents were asked to rate the quality of the beach environment in Palm Beach County, considering factors such as cleanliness and safety. Among full-time residents, the majority provided favorable responses—32 percent rated the beach environment as Excellent and 52 percent as Good, with just 10 percent selecting Fair and only one percent rating beach quality as Poor. Part-time residents responded similarly, with slightly stronger ratings overall: 36 percent rated beach quality as Excellent, 47 percent as Good, and 12 percent as Fair, with one percent indicating Poor.

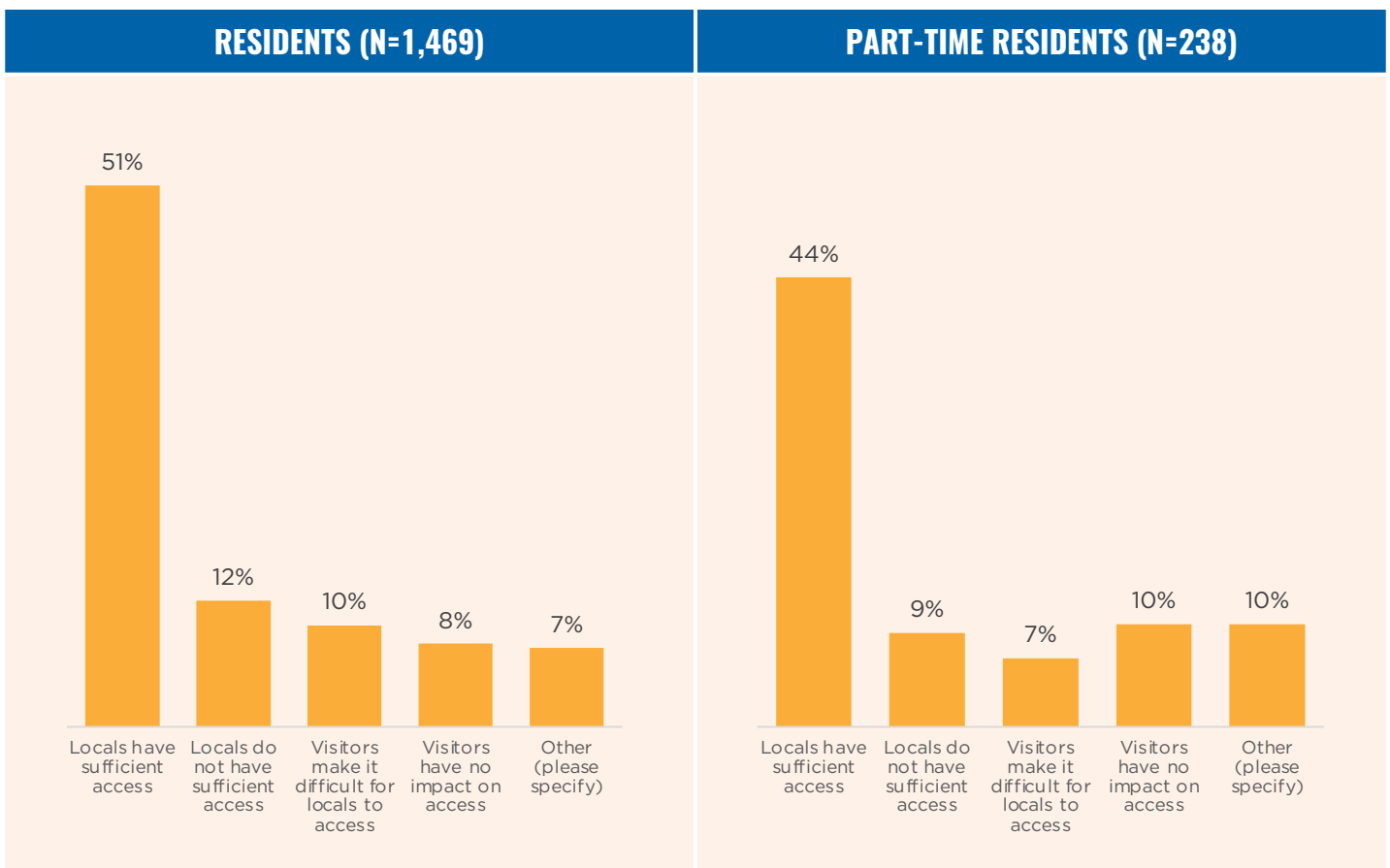
These findings can be interpreted in conjunction with the results of the previous questions regarding beach accessibility, suggesting that while access may be a point of concern for some, the quality of the beach environment itself is widely viewed as a strong asset by both groups of residents. Maintaining this high level of satisfaction with cleanliness and safety will be essential as visitation levels increase and pressure on coastal infrastructure grows.



Q27. HOW DO YOU FEEL ABOUT THE AVAILABILITY OF OUTDOOR RECREATIONAL ACTIVITIES (E.G., HIKING, BIKING TRAILS, GOLF COURSES, TENNIS COURTS) IN PALM BEACH COUNTY?

Residents and part-time residents were asked to evaluate their access to outdoor recreational activities throughout Palm Beach County. Among full-time residents, 51 percent agreed that locals have sufficient access—a greater majority than those who indicated locals have sufficient beach access—while 12 percent felt access was lacking and 10 percent cited that visitors make it difficult for locals to access these amenities. Eight percent believed visitors have no impact on access. Part-time residents responded similarly, with 44 percent indicating sufficient access, nine percent noting insufficient access, and seven percent expressing that visitors create barriers. Ten (10) percent of part-time residents stated that visitors have no impact on access.

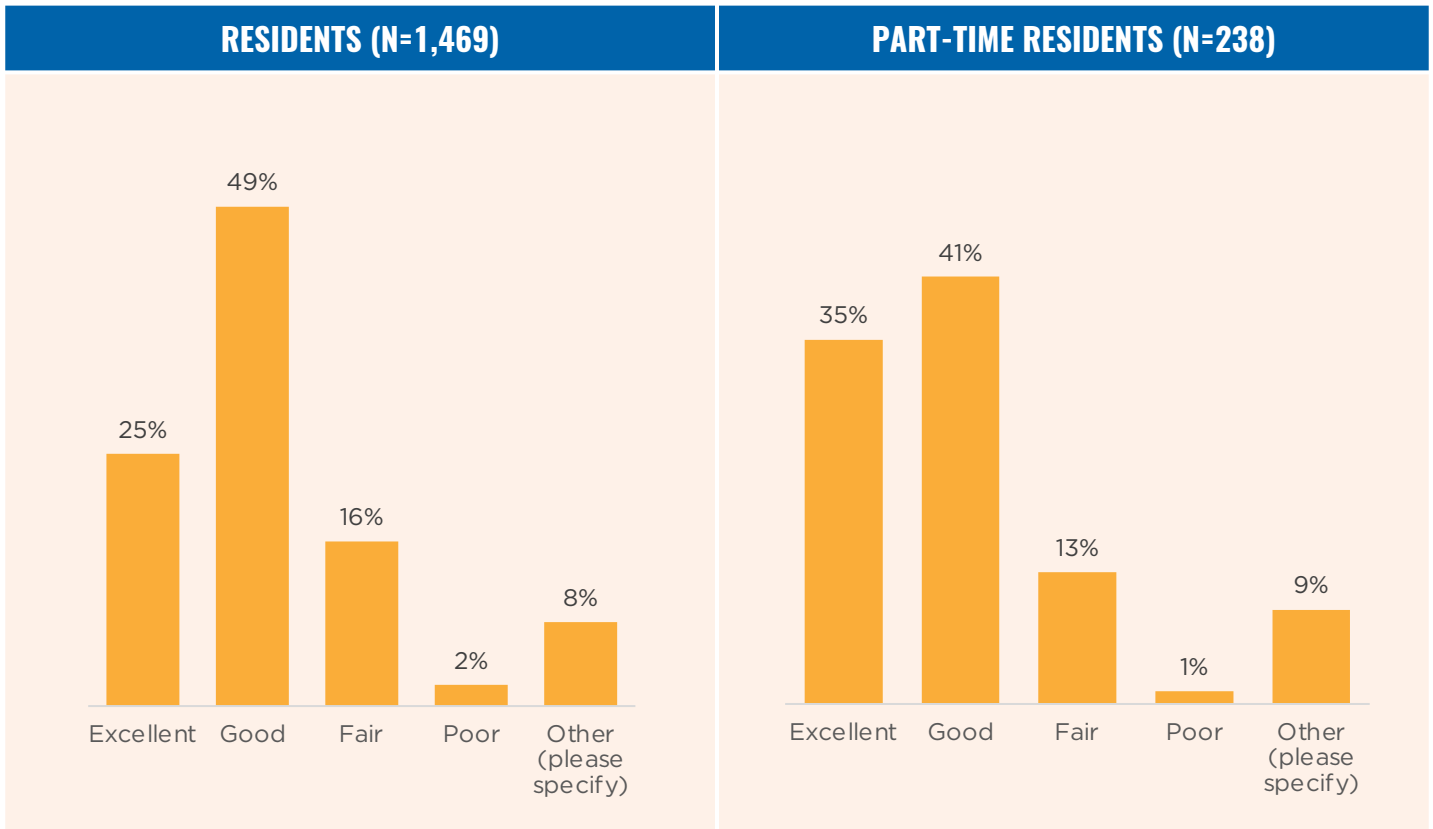
These results suggest that outdoor recreation access is generally viewed favorably by both resident groups. However, a minority of respondents cited lack of access concerns. Relative to concerns expressed in the beach access question, outdoor recreational offerings may be more evenly distributed and less impacted by seasonal crowding or geographic limitations.



Q28. HOW WOULD RATE THE QUALITY OF PUBLIC SPORTS AND RECREATION FACILITIES (CONDITION, ACCESSIBILITY, MAINTENANCE) IN PALM BEACH COUNTY?

Residents and part-time residents were asked to evaluate the quality of public sports and recreation facilities in Palm Beach County, including considerations such as condition, accessibility, and maintenance. Among full-time residents, 25 percent rated the quality of these facilities as Excellent and 49 percent as Good, while 16 percent selected Fair and only two percent rated them as Poor. Among part-time residents, ratings were slightly more favorable: 35 percent chose Excellent and 41 percent Good, while 13 percent chose Fair and only one percent selected Poor.

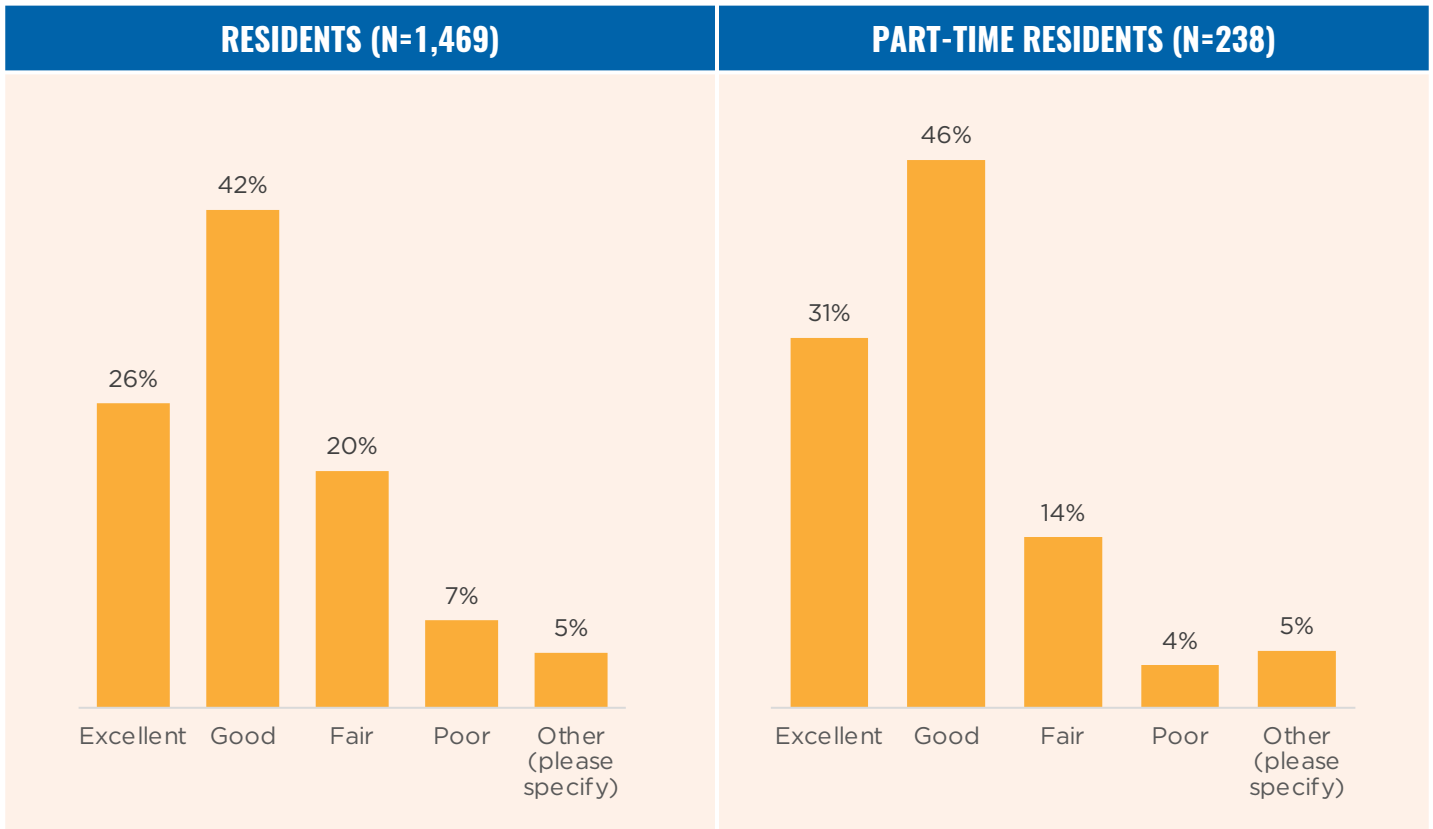
These findings suggest that both full-time and part-time residents generally view the County’s public sports and recreation facilities positively, though part-time residents were somewhat more likely to give “Excellent” ratings. As with outdoor recreation access, these results reflect overall satisfaction but also indicate room for modest improvement in facility upkeep and accessibility.



Q29. HOW WOULD YOU RATE THE NUMBER/ABUNDANCE OF NIGHTLIFE AND ENTERTAINMENT OPTIONS IN PALM BEACH COUNTY?

Perceptions of the abundance of nightlife and entertainment options varied somewhat between full-time and part-time residents. Among full-time residents, 26 percent rated the number of nightlife options as Excellent and 42 percent as Good, while 20 percent selected Fair and seven percent felt the County's abundance of offerings was Poor. By comparison, part-time residents offered slightly more favorable assessments: 31 percent rated abundance as Excellent and 46 percent as Good, while 14 percent selected Fair and only four percent Poor.

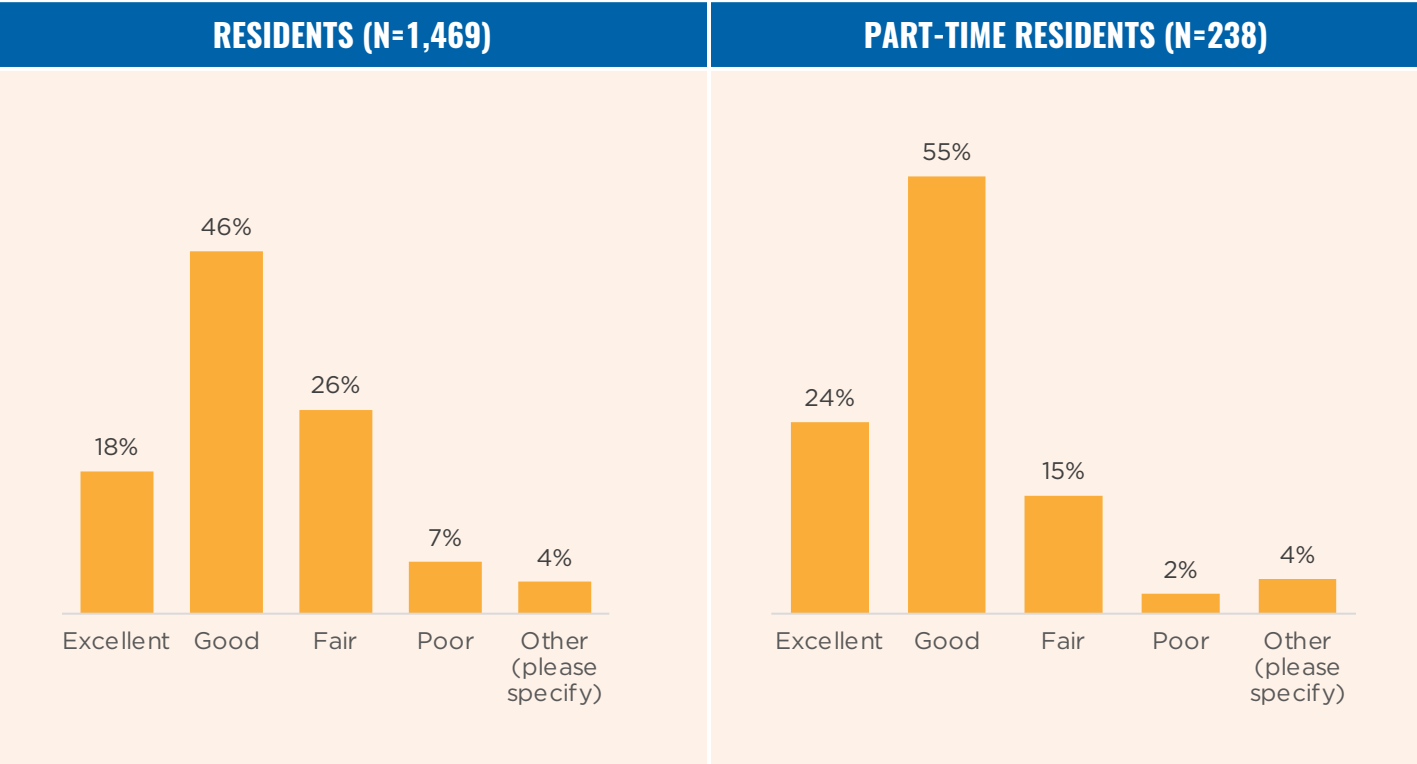
While both groups generally responded positively, the higher share of "Fair" and "Poor" responses among full-time residents suggests a moderate opportunity to expand or better promote evening entertainment options, particularly for year-round locals who may seek more variety or access. This context will be important in evaluating perceptions of nightlife quality in the next section.



Q30. HOW WOULD YOU RATE THE QUALITY OF NIGHTLIFE AND ENTERTAINMENT EXPERIENCES (SAFETY, CULTURAL REPRESENTATION, AFFORDABILITY) IN PALM BEACH COUNTY?

After evaluating the availability of nightlife options, respondents were asked to reflect on the overall quality of those experiences—considering factors such as safety, cultural representation, and affordability. Full-time residents offered a mix of positive and critical feedback. While nearly two-thirds rated the quality as either Excellent or Good, a substantial share expressed lukewarm or negative impressions, with roughly one in three describing the nightlife scene as only Fair or Poor. Part-time residents were more favorable in their assessments, with the vast majority (79 percent) rating the quality positively and relatively few expressing dissatisfaction.

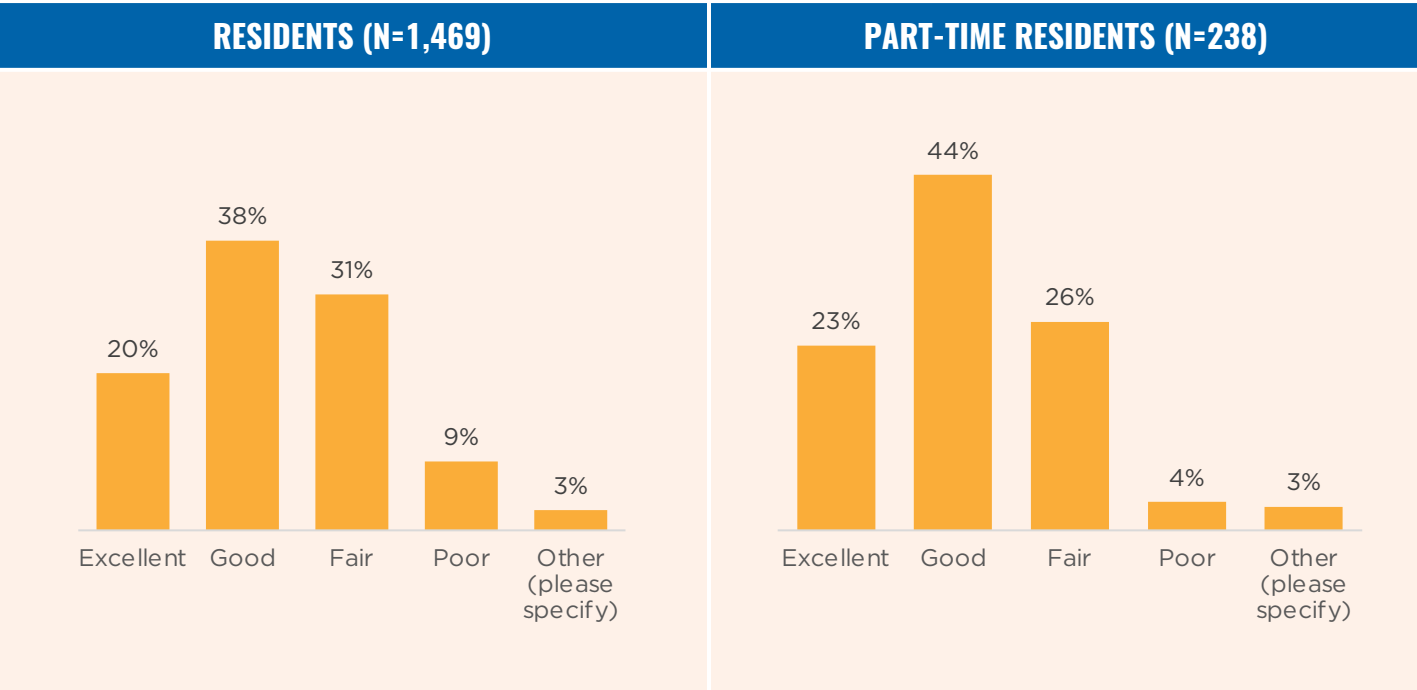
Compared to perceptions of abundance, ratings of nightlife quality were lower among full-time residents—pointing to potential concerns about safety, affordability, or cultural representation. While part-time residents remain more positive overall, these results suggest there may be room to elevate both the variety and the perceived value of the nightlife experience, especially for locals.



Q31. HOW WOULD YOU RATE THE NUMBER / ABUNDANCE OF AFFORDABLE / CASUAL DINING OPTIONS IN PALM BEACH COUNTY?

When asked to rate the abundance of affordable and casual dining options in Palm Beach County, residents and part-time residents expressed generally positive views, though responses revealed more ambivalence than in previous topics like recreation or beach access. Among full-time residents, 20 percent rated the abundance as Excellent and 38 percent as Good. However, nearly a third (31 percent) selected Fair, and 9 percent rated options as Poor, indicating that a sizable portion of residents feel casual dining could be more plentiful or accessible. Part-time residents provided slightly more favorable ratings overall. Nearly half (44 percent) rated the abundance of affordable dining as Good, while 23 percent selected Excellent and only four percent selected Poor.

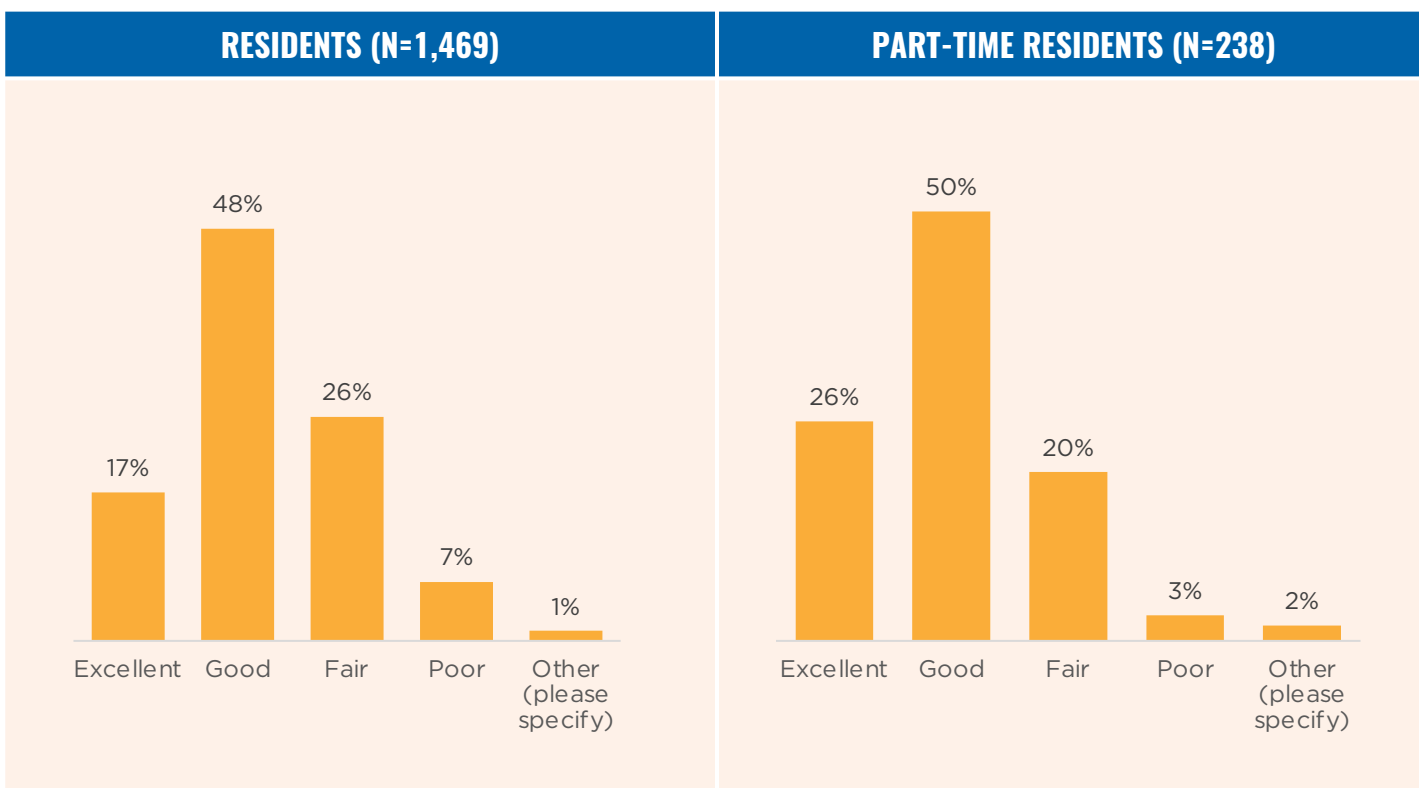
These findings suggest that while most respondents find the County’s casual dining landscape acceptable, there remains notable room for improvement—particularly among full-time residents, who may be more attuned to the everyday accessibility and affordability of dining options across a broader range of neighborhoods. This context will be important to consider in the upcoming question about the perceived quality of these offerings.



Q32. HOW WOULD YOU RATE THE QUALITY OF AFFORDABLE /CASUAL DINING OPTIONS IN PALM BEACH COUNTY?

Following up on their assessment of the abundance of casual dining options, respondents were also asked to evaluate the quality of these offerings. Full-time residents were more reserved in their assessments—while a majority rated quality as either Excellent or Good (17 percent and 48 percent, respectively), one-third described casual dining quality as either Fair (26 percent) or Poor (seven percent). This closely mirrors the sentiment seen in the previous question, where 40 percent of full-time residents expressed reservations about abundance. Part-time residents offered stronger ratings overall. More than three-quarters rated casual dining quality as Good or Excellent, and just three percent rated it Poor. The proportion selecting Fair was also smaller compared to full-time residents.

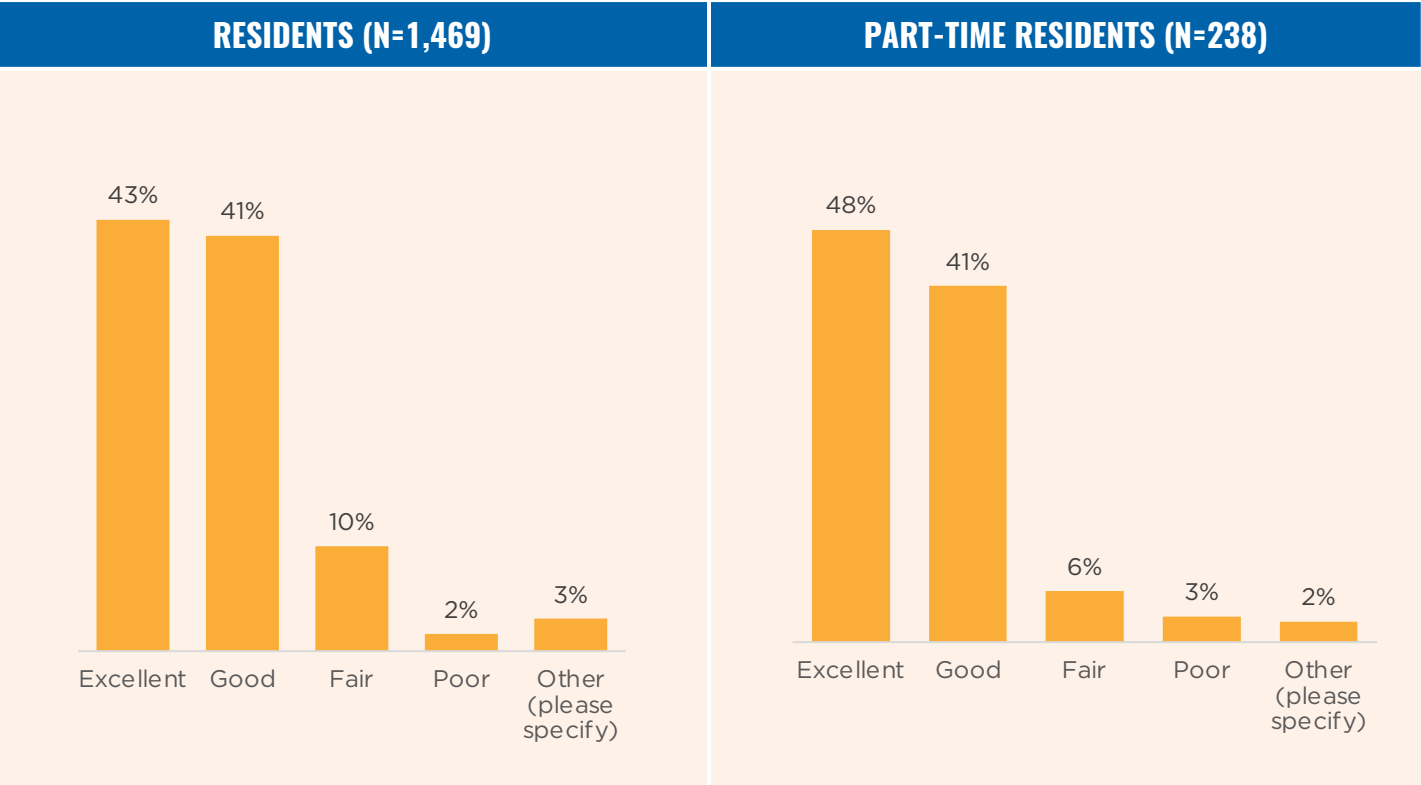
These results suggest that while most respondents are satisfied with the quality of casual dining, the experience may fall short of expectations for some year-round residents. Part-time residents, who may engage with the destination more like visitors during peak seasons or leisure-focused stays, tend to rate dining quality more favorably, highlighting a gap in perception that could be addressed by improving consistency, variety, and affordability throughout the year.



Q33. HOW WOULD YOU RATE THE NUMBER/ABUNDANCE OF FINE DINING OPTIONS IN PALM BEACH COUNTY?

Opinions on the abundance of fine dining options in Palm Beach County were overwhelmingly positive among both resident groups. Full-time residents gave high marks, with 43 percent rating availability as Excellent and another 41 percent as Good. Only a small portion—10 percent—selected Fair, and just two percent rated it Poor. Part-time residents responded even more favorably. Nearly half (48 percent) rated fine dining abundance as Excellent, and 41 percent said Good. Only 6 percent viewed availability as Fair, and three percent as Poor.

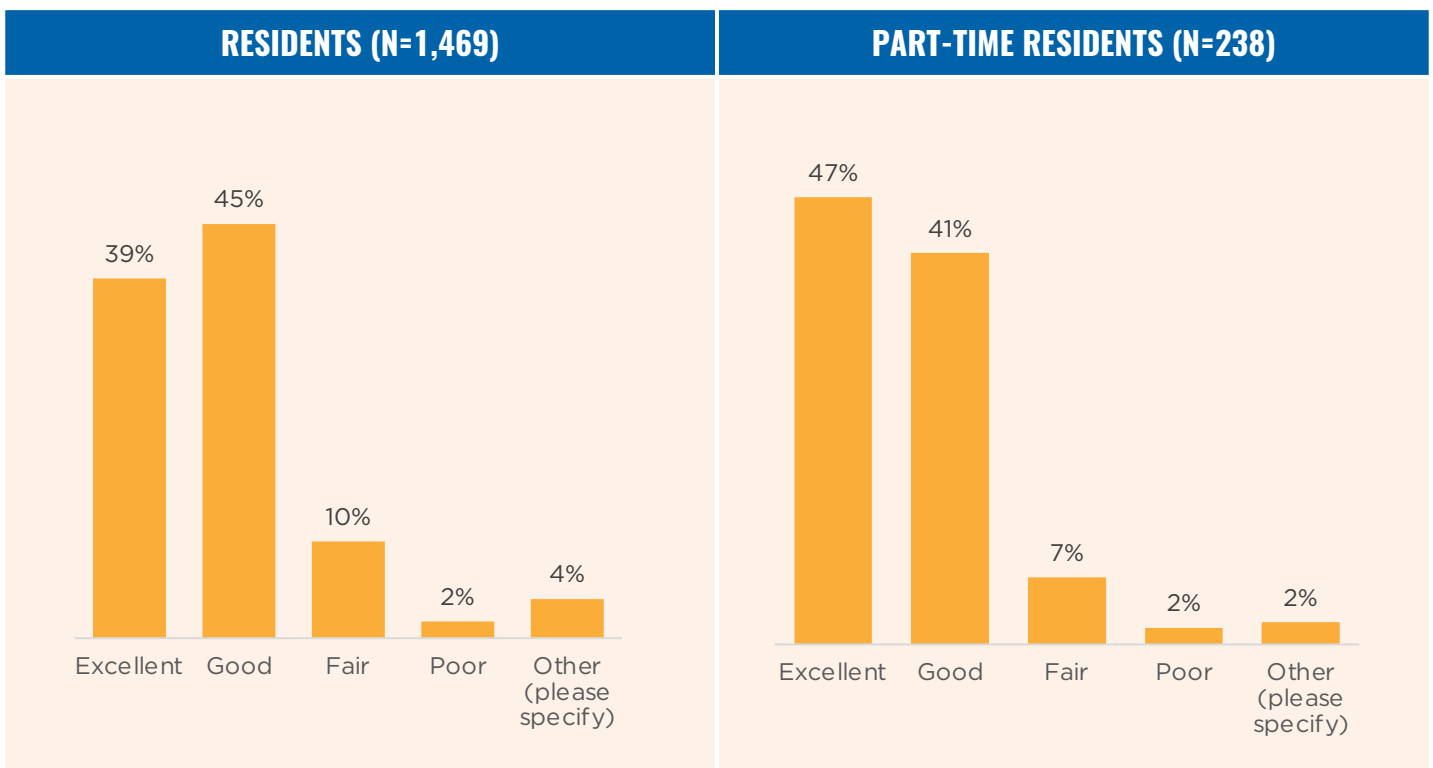
These results suggest that Palm Beach County’s upscale dining scene is a standout strength across both resident segments, particularly among part-time residents, who may seek high-end culinary experiences more frequently during leisure-focused stays. This strong perception of abundance sets a high bar as we look next at resident perception of fine dining establishment quality.



Q34. HOW WOULD YOU RATE THE QUALITY OF FINE DINING OPTIONS IN PALM BEACH COUNTY?

Following their overwhelmingly positive assessment of fine dining availability, respondents also expressed strong confidence in the quality of these offerings. Among full-time residents, 39 percent rated quality as Excellent and 45 percent as Good, with only 10 percent selecting Fair and just 2 percent Poor. Part-time residents responded even more enthusiastically, with nearly half (47 percent) rating fine dining quality as Excellent, and another 41 percent as Good. Just 7 percent selected Fair and 2 percent Poor—nearly identical to the full-time resident response in terms of negative sentiment.

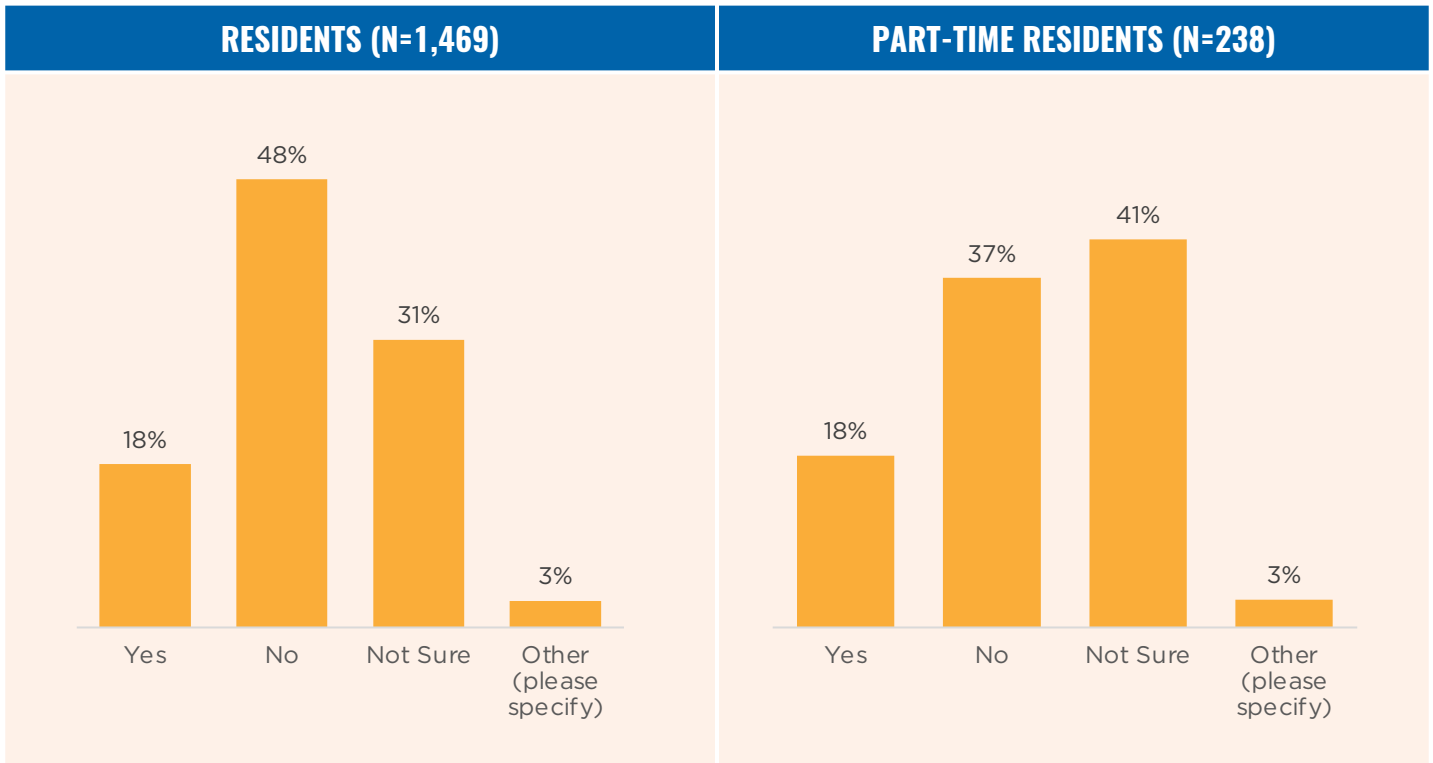
Taken together, these results reinforce the County's strength in delivering high-end culinary experiences that meet or exceed expectations across both year-round and seasonal resident groups. The consistent satisfaction in both abundance and quality underscores fine dining as a top-performing segment within Palm Beach County's overall hospitality and lifestyle offerings.



Q35. DO YOU THINK ENOUGH IS BEING DONE TO PROMOTE LOCAL AND FARM-TO-TABLE CUISINE IN PALM BEACH COUNTY?

Awareness and perceptions of local and farm-to-table culinary promotion appear to be limited among both full-time and part-time residents. Just 18 percent of respondents in each group felt that enough is being done to promote this type of cuisine in Palm Beach County. Nearly half of full-time residents (48 percent) said No, while 31 percent selected Not Sure. Among part-time residents, the No response was lower at 37 percent, but a larger share (41 percent) said they were Not Sure.

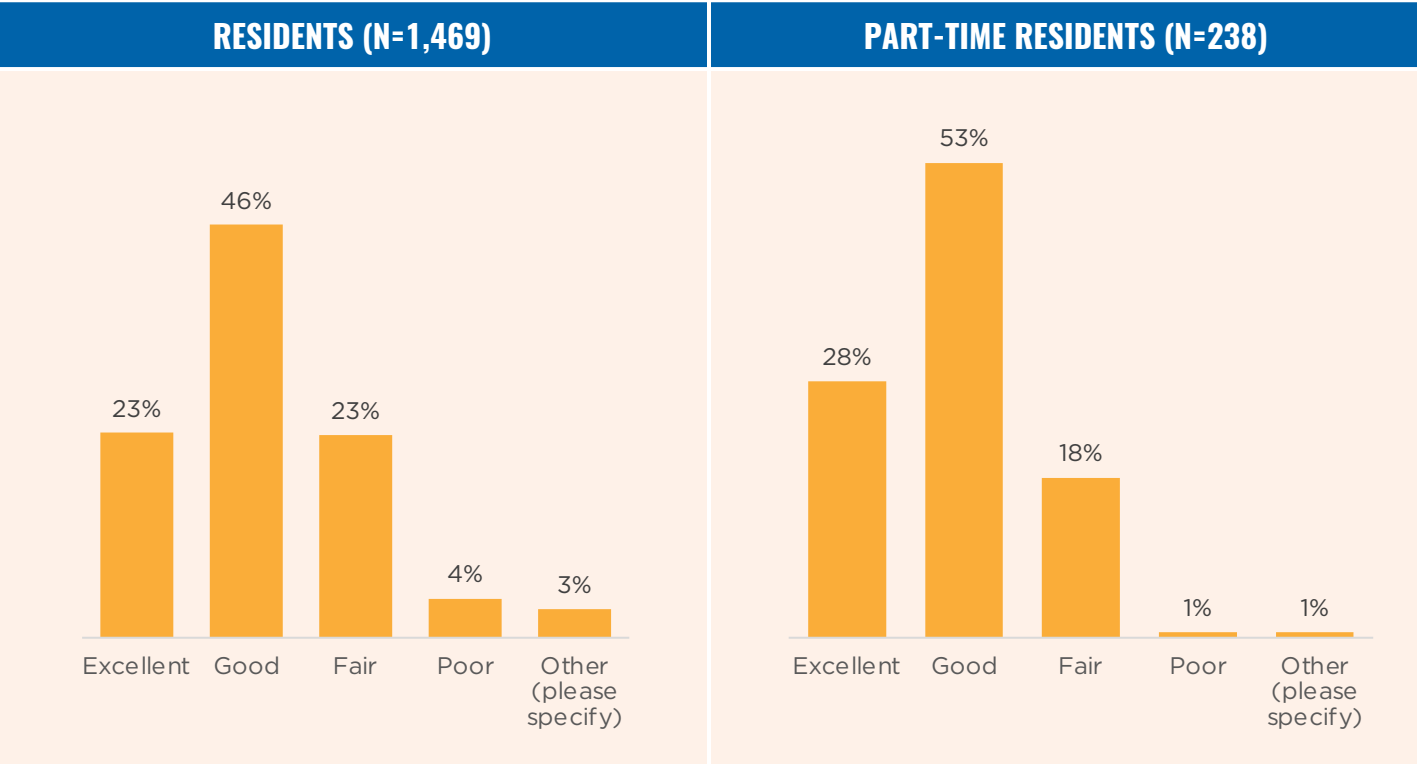
These results indicate that while farm-to-table dining may exist in the market, visibility and branding around local culinary sourcing remain unclear or underemphasized for many residents. Strengthening partnerships with local producers, chefs, and restaurant groups—alongside more deliberate marketing—may help increase awareness and drive greater interest in this increasingly valued dining segment.



Q36. HOW WOULD YOU RATE THE NUMBER/ABUNDANCE OF SHOPS AND RETAIL BUSINESS CATERING TO LOCAL NEEDS IN PALM BEACH COUNTY?

Resident feedback on the availability of retail and shopping options geared toward local needs was generally favorable but showed a more balanced range of sentiment compared to other experience areas. Among full-time residents, 46 percent rated the abundance of locally relevant retail as Good, while 23 percent rated it Excellent. However, another 23 percent selected Fair and 4 percent chose Poor, signaling that a portion of year-round residents may feel underserved or disconnected from the County’s retail mix. Part-time residents responded more positively, with over half (53 percent) rating local retail availability as Good and 28 percent as Excellent. Just 18 percent selected Fair and only one percent rated abundance of locally owned shops and retail Poor.

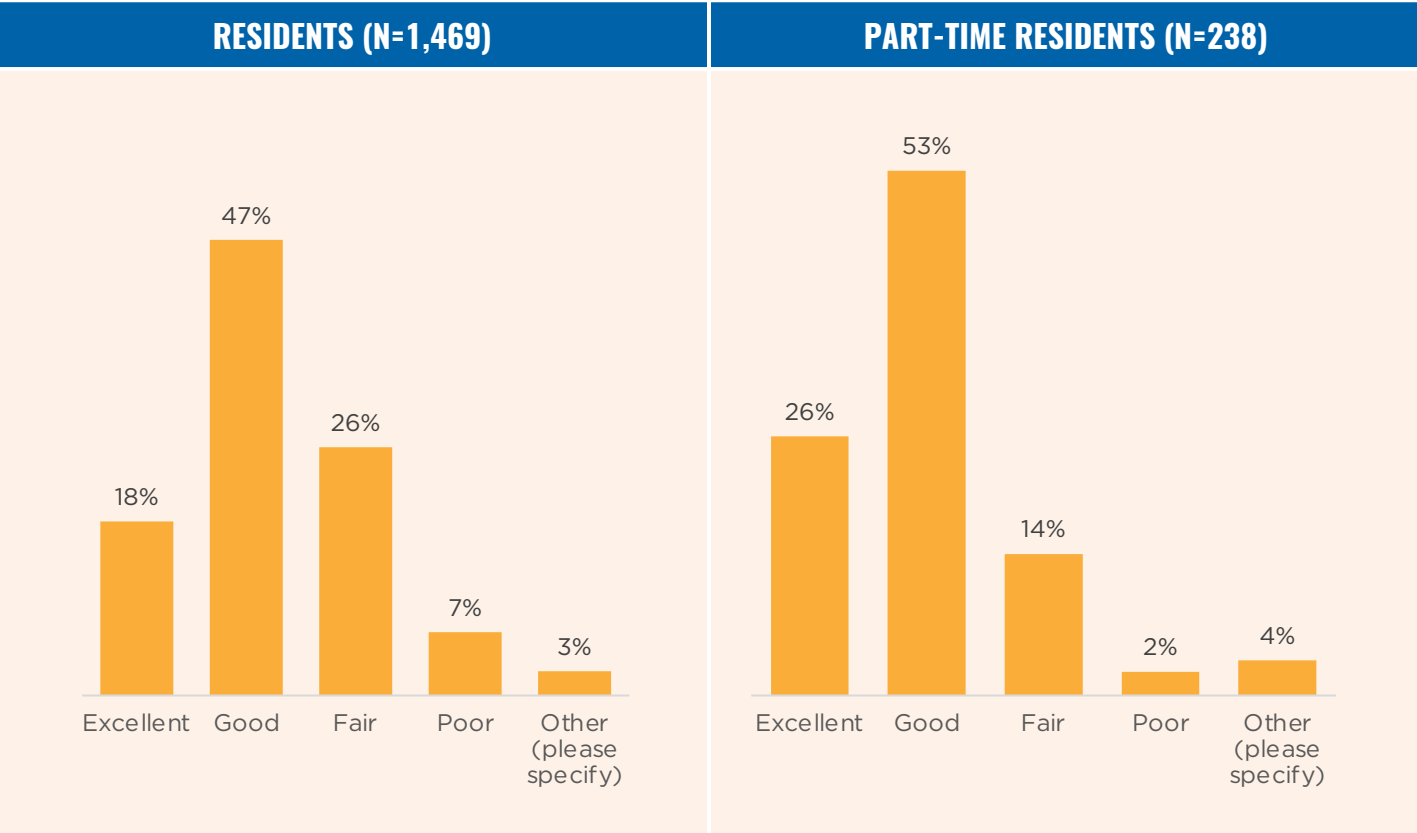
These results suggest that while the County’s retail offerings geared towards day to day quality of life are broadly seen as sufficient—particularly by part-time residents—there may be room to strengthen the everyday relevance and geographic accessibility of shops catering to full-time residents’ practical needs.



Q37. HOW WOULD YOU RATE THE QUALITY OF RETAIL EXPERIENCES (AFFORDABILITY, VARIETY, LOCAL REPRESENTATION) IN PALM BEACH COUNTY?

When asked to evaluate the quality of retail experiences in Palm Beach County—including affordability, variety, and representation of local businesses—residents offered moderately positive views, though not without some reservations. A majority of full-time residents described the retail environment as either Excellent or Good, but more than one-third felt it was merely Fair or Poor. This aligns with prior feedback suggesting that while the quantity of retail options may be sufficient, quality factors like value or local relevance may not always meet expectations. Part-time residents, on the other hand, expressed more confidence in the retail experience. Compared to full-time residents, they were significantly more likely to rate retail quality in the top two categories and much less likely to report dissatisfaction.

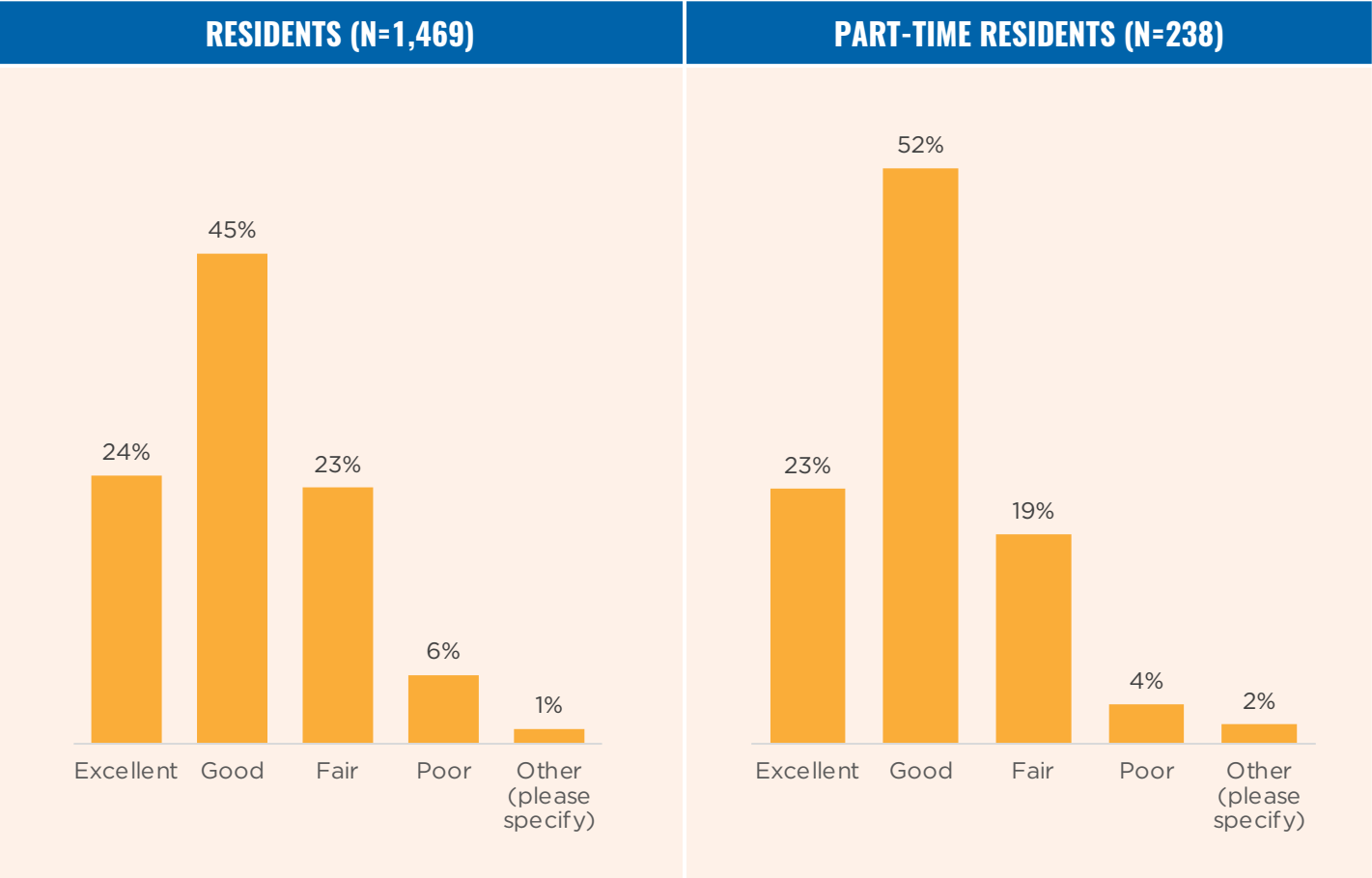
While Palm Beach County’s retail offerings are generally well-regarded, opportunities remain to better tailor experiences to year-round locals—particularly around pricing, neighborhood access, and a more distinct presence of small or community-rooted businesses.



Q38. HOW WOULD YOU RATE THE VARIETY OF MUSEUMS (ART, HISTORY, ETC.) IN PALM BEACH COUNTY?

Full time residents expressed generally positive views regarding the variety of museums available in Palm Beach County, though feedback was more mixed than in other categories like nightlife or fine dining. A majority (69 percent) of full-time residents rated the variety as either Excellent or Good, but a notable share—nearly one in four—felt offerings were only Fair. A smaller segment (six percent) rated the variety Poor, indicating that while the baseline perception is favorable, expectations for diversity or niche content may not be fully met. Part-time residents were somewhat more enthusiastic in their assessments. More than half viewed the variety of museums as Good, with Excellent ratings closely aligned with those of full-time residents. Fewer respondents in this group selected Fair or Poor, suggesting that the current slate of museum offerings resonates more strongly with seasonal or leisure-focused audiences.

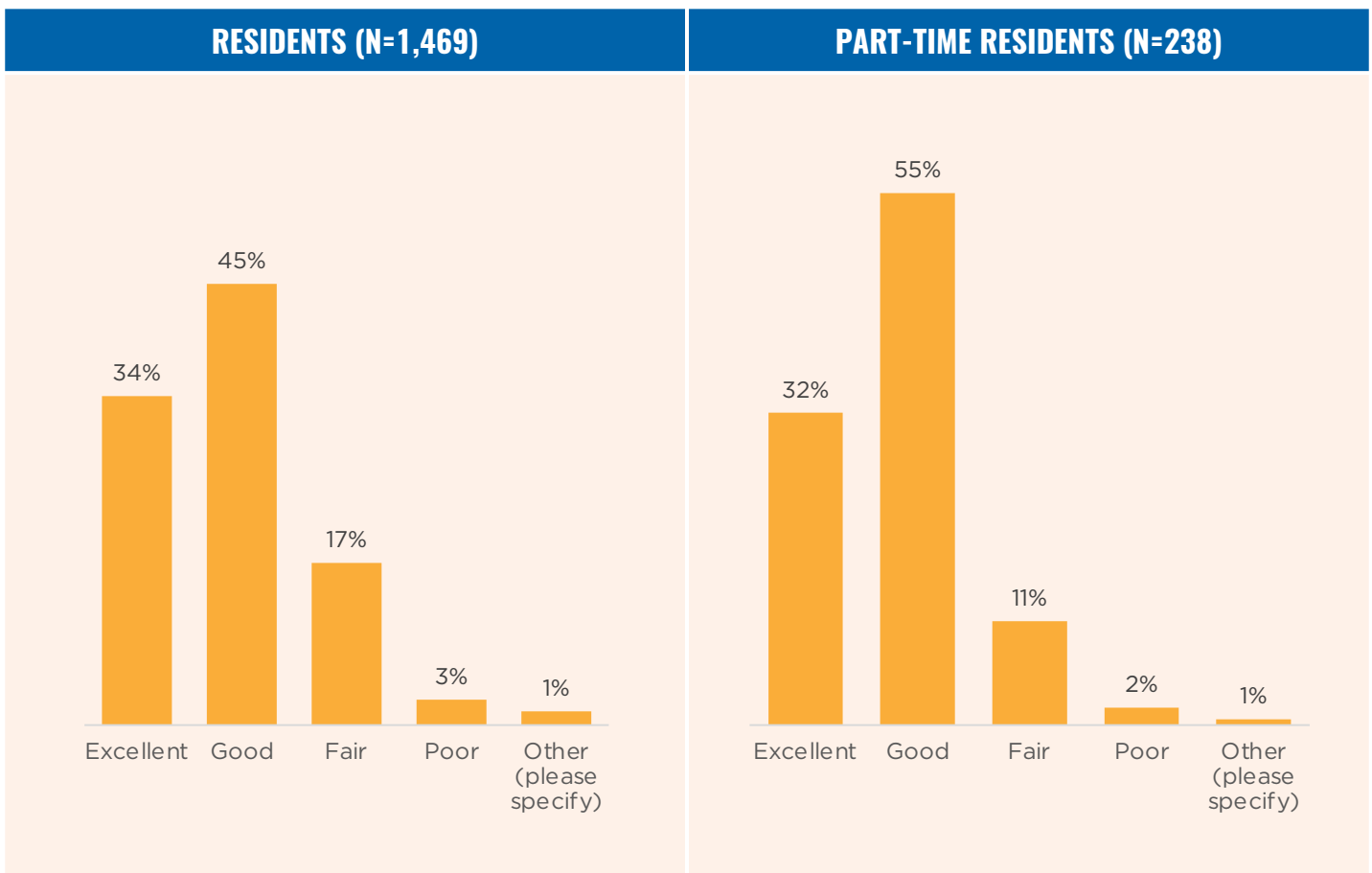
These findings point to an opportunity to broaden the range of museum experiences—particularly those reflecting diverse interests or cultural narratives—to further engage full-time residents and expand the County’s year-round cultural appeal.



Q39. HOW WOULD YOU RATE THE QUALITY OF MUSEUMS (ART, HISTORY, ETC.) IN PALM BEACH COUNTY?

Compared to perceptions of museum variety, respondents rated the quality of museum experiences in Palm Beach County even more favorably. Among full-time residents, nearly 80 percent rated quality as either Excellent or Good, with fewer respondents selecting Fair or Poor than in the prior question. This suggests that while some may feel the County could offer a broader or more diverse selection of museums, the institutions that do exist are viewed as high caliber in terms of content, curation, and visitor experience. Part-time residents echoed this sentiment and were slightly more enthusiastic overall than the residents. More than half rated museum quality as Good, and Excellent ratings were nearly identical to those of full-time residents—87 percent of part time respondents rated PBC museum quality as better than fair.

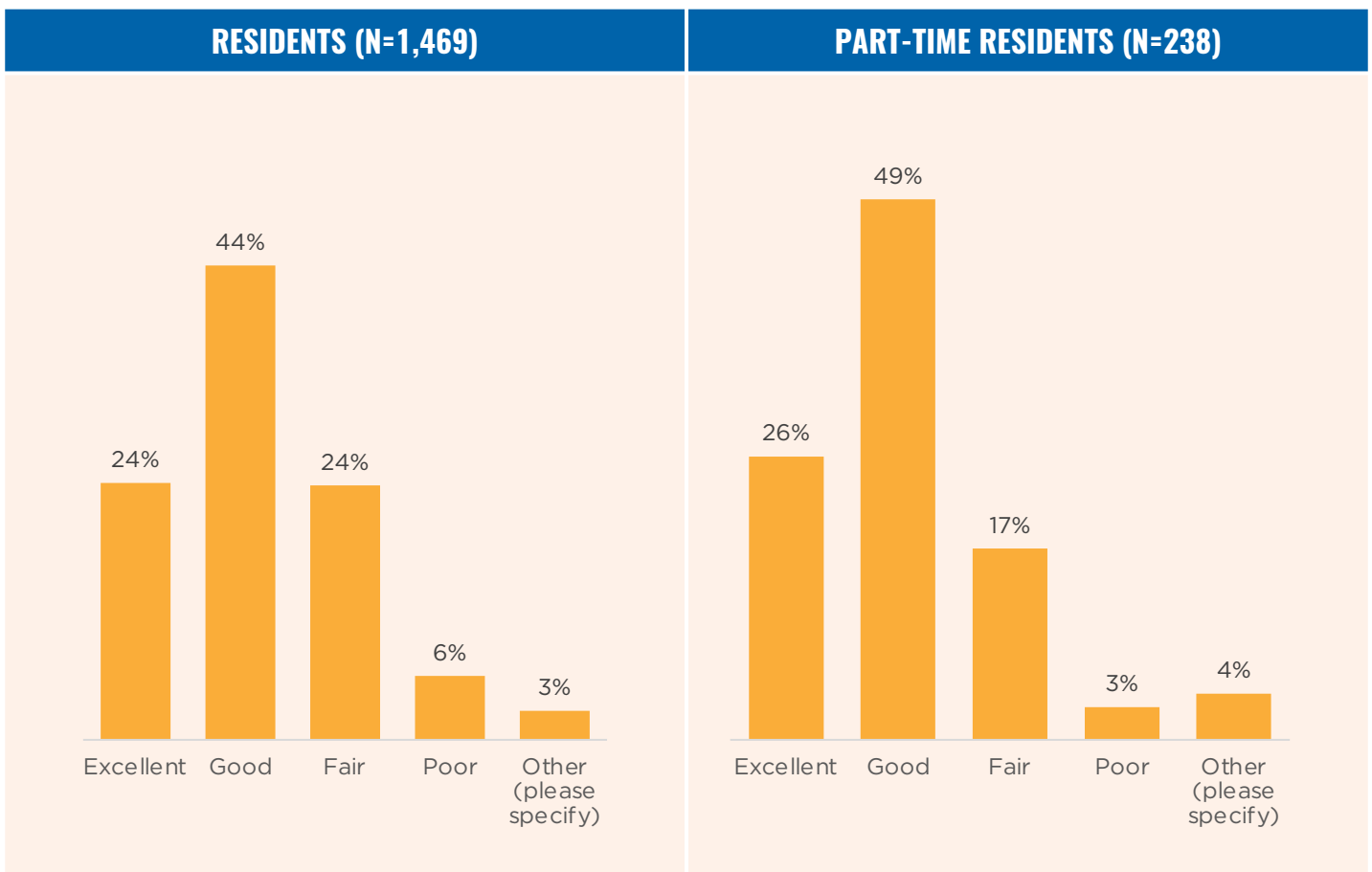
While residents—particularly full-time ones—may desire greater museum variety, the County’s existing institutions are likely delivering strong experiences. Efforts to expand cultural offerings or build greater awareness around underrepresented museums could help bridge the gap between high satisfaction with quality and more tempered views on abundance.



Q40. HOW WOULD YOU RATE THE VARIETY OF PERFORMING ART VENUES IN PALM BEACH COUNTY?

Residents and part-time residents were asked to rate the variety and quality of the County's performing arts venues. Perceptions of the variety, presented below, were broadly positive. However, overall feedback—particularly from full-time residents—was somewhat more mixed compared to categories like museums and fine dining. While most full-time residents rated variety as either Good or Excellent, one in four selected Fair and a modest portion rated the variety Poor, suggesting some unmet expectations around accessibility, genre diversity, or geographic distribution. Part-time residents responded more favorably overall. Just under half rated the variety of venues as Good, and more than one-quarter selected Excellent. Fewer respondents in this group expressed dissatisfaction, with both Fair and Poor ratings trailing those seen among full-time residents.

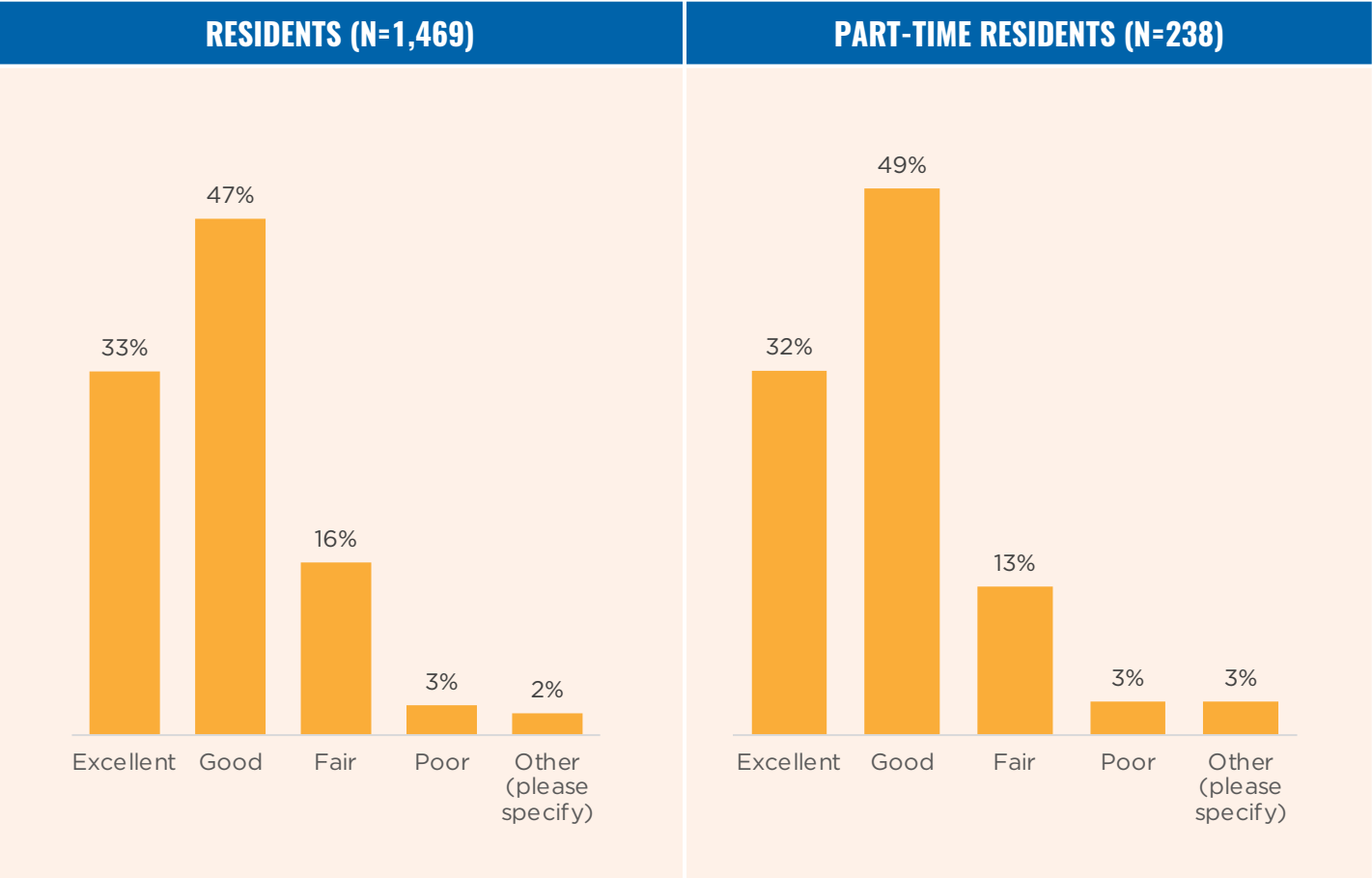
These results suggest that while part-time residents appear more satisfied with the number of performing arts venues available, full-time residents may perceive a more limited range. This points to a likely potential opportunity to broaden the scope or visibility of performing arts offerings—whether through geographic expansion, more diverse programming, or increased year-round activity.



Q41. HOW WOULD YOU RATE THE QUALITY OF PERFORMING ARTS VENUES IN PALM BEACH COUNTY?

Following up on their views regarding the variety of performing arts venues, respondents were asked to assess overall quality—including elements such as ambiance, programming, and facility standards. Full-time residents responded positively: 33 percent rated quality of performing arts venues as Excellent and 47 percent as Good, totaling 80 percent in the top two categories. While 16 percent selected Fair and three percent Poor, the distribution suggests a solid level of satisfaction with the caliber of existing venues, even among those who felt variety could be improved. Part-time residents again rated this experience slightly more favorably. A combined 81 percent selected either Excellent (32 percent) or Good (49 percent), while just 13 percent chose Fair and only 3 percent Poor. This closely mirrors their ratings for variety and suggests a consistent level of satisfaction across both availability and quality.

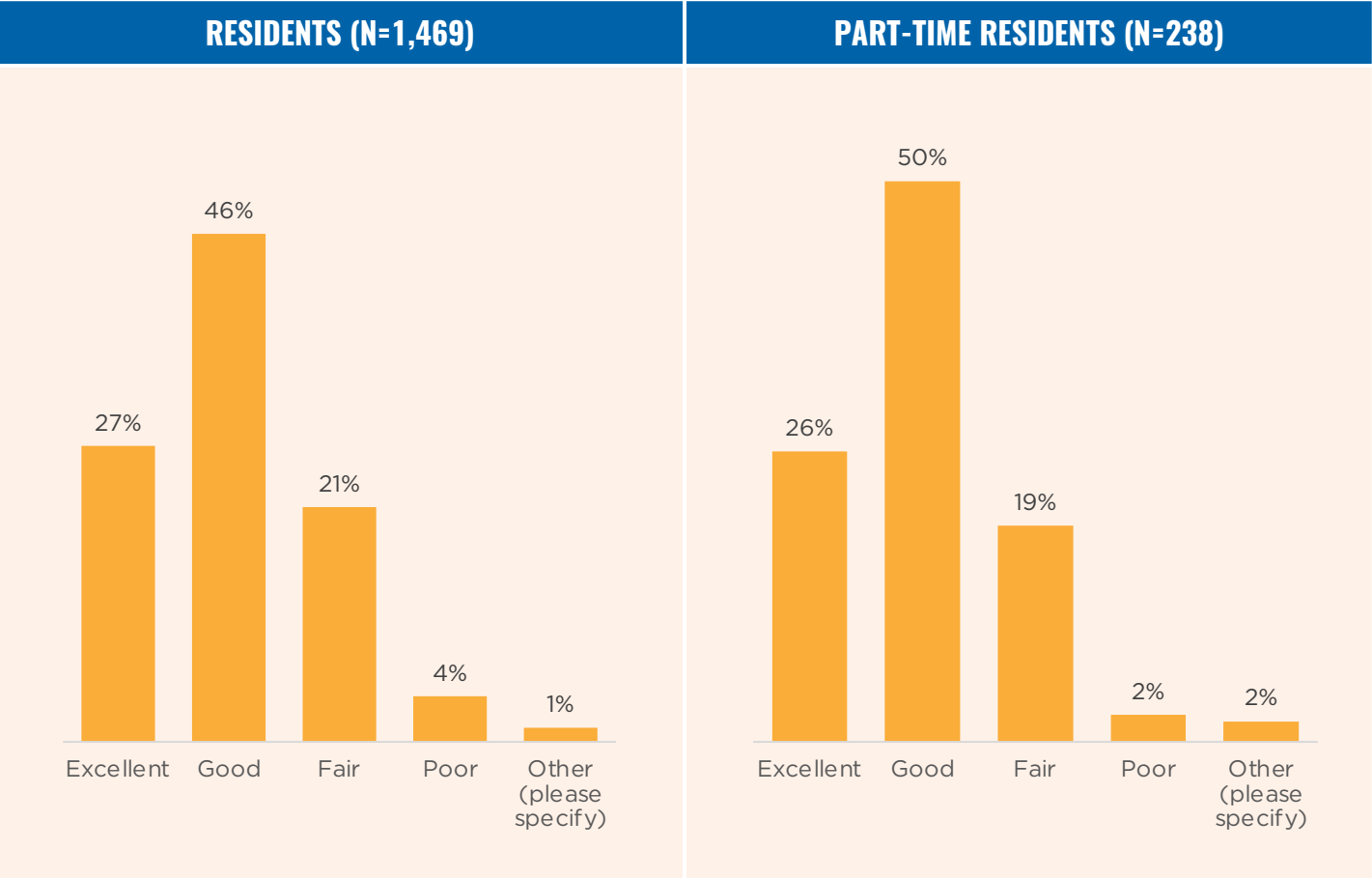
Much like their feedback on PBC’s museums, while some full-time residents may wish to see more performing arts options throughout the County, the venues that do exist are widely seen as high-quality and professionally managed—particularly by part-time residents, who may be more focused on marquee performances or seasonal shows.



Q42. HOW WOULD YOU DESCRIBE THE VARIETY OF ARTS AND CULTURAL EVENTS, EXPERIENCES AND ATTRACTIONS IN PALM BEACH COUNTY?

When asked to assess the breadth of arts and cultural experiences available in the County—including festivals, public art, historic programming, and more—most respondents expressed moderate to strong satisfaction. Among full-time residents, 27 percent rated the variety of offerings as Excellent and 46 percent as Good, representing nearly three-quarters of all responses. However, 21 percent selected Fair and four percent Poor, indicating that a meaningful portion of residents may be seeking greater diversity, accessibility, or visibility of cultural programming. Part-time residents offered slightly more favorable ratings overall. Half described the cultural variety as Good and 26 percent as Excellent, with lower shares selecting Fair (19 percent) or Poor (two percent). The narrower spread of responses suggests a more consistent perception of adequacy among seasonal respondents.

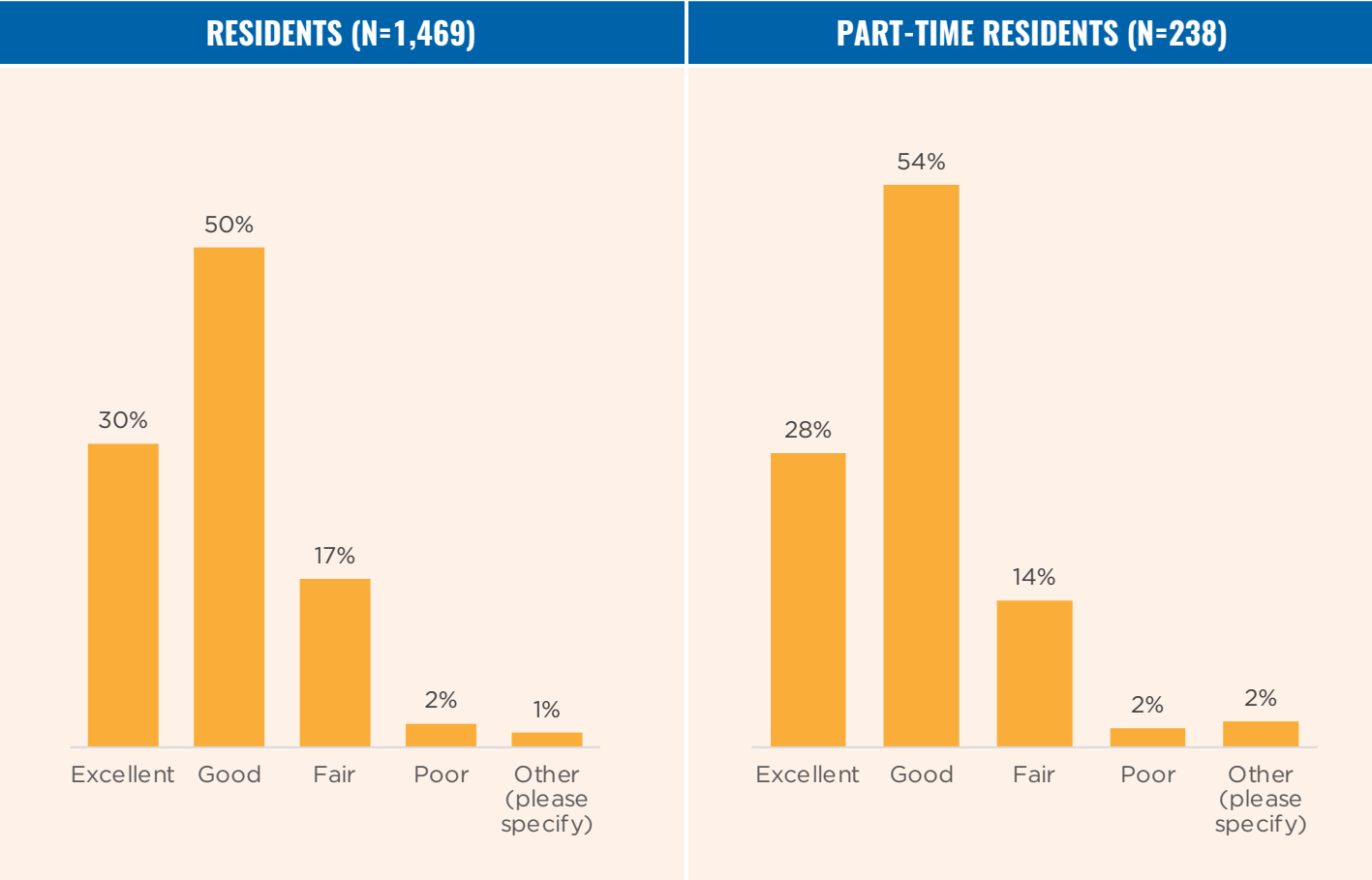
These findings point to an overall sense that Palm Beach County offers a solid foundation of arts and cultural programming but also highlight potential for improvement—particularly from the perspective of full-time residents who may be more attuned to seasonal lulls or underserved segments of the community.



Q43. HOW WOULD YOU DESCRIBE THE QUALITY OF ARTS AND CULTURAL EVENTS, EXPERIENCES AND ATTRACTIONS IN PALM BEACH COUNTY?

Ratings of overall quality in Palm Beach County’s arts and cultural offerings were largely positive, reinforcing earlier feedback about the community’s cultural base. Among full-time residents, 30 percent rated quality as Excellent and 50 percent as Good, while 17 percent selected Fair and just two percent Poor. These results track closely with the prior question on variety, though the distribution suggests slightly greater satisfaction with the execution of events and experiences than with their breadth. Part-time residents were similarly favorable, with 54 percent choosing Good and 28 percent Excellent, totaling 82 percent in the top two categories. Their lower rates of Fair (14 percent) and Poor (2 percent) responses suggest a slightly more consistent appreciation of what is currently being offered within the County.

Including the data on the previous page, these results suggest that Palm Beach County delivers high-quality cultural experiences—even if some residents feel there’s room for a broader array of events. The relatively low share of dissatisfaction amongst both groups of residents reinforces the perception of a strong foundation on which to continue building arts and culture programming.

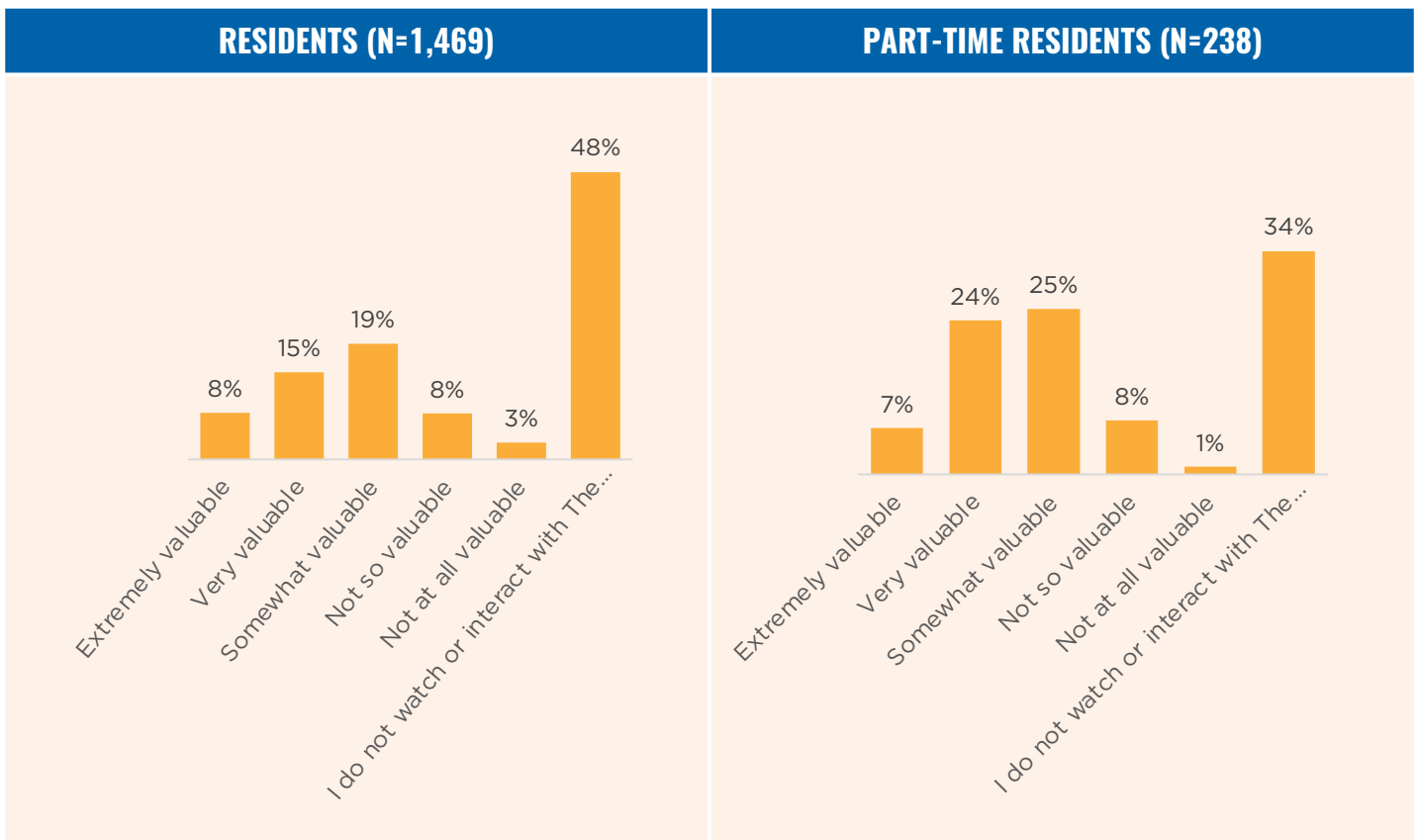


Q44. HOW VALUABLE DO YOU FIND THE PALM BEACHES TV AS A SOURCE OF LOCAL INFORMATION AND ENTERTAINMENT?

Resident and part-time resident respondents were asked about the value of The Palm Beaches TV, particularly in terms of discovering or keeping up with local events and entertainment options. Among resident respondents, nearly half (48 percent) reported that they do not watch or interact with The Palm Beaches TV, while a combined 34 percent rated it as either “somewhat” or “very valuable.” Only eight percent considered it “extremely valuable,” while another eight percent said it was “not so valuable” and three percent rated it “not at all valuable.”

Part-time residents were more likely to engage with the channel—thirty-four (34) percent indicated they do not watch or interact with The Palm Beaches TV. Perceptions of its value among part-time residents appear more favorable compared to full-time residents. Part-time residents were more likely than full-time residents to assign higher scores—forty-one (41) percent rated the channel as either “very” or “somewhat valuable,” compared to 23 percent by full-time residents. Meanwhile, the share of negative or neutral responses (“not so valuable” or “not at all valuable”) remained similar across both groups, suggesting overall satisfaction is modest but somewhat stronger among the part-time population.

These findings suggest that The Palm Beaches TV has a more active following among part-time residents and may offer a greater perceived benefit as a local information source for this audience segment.



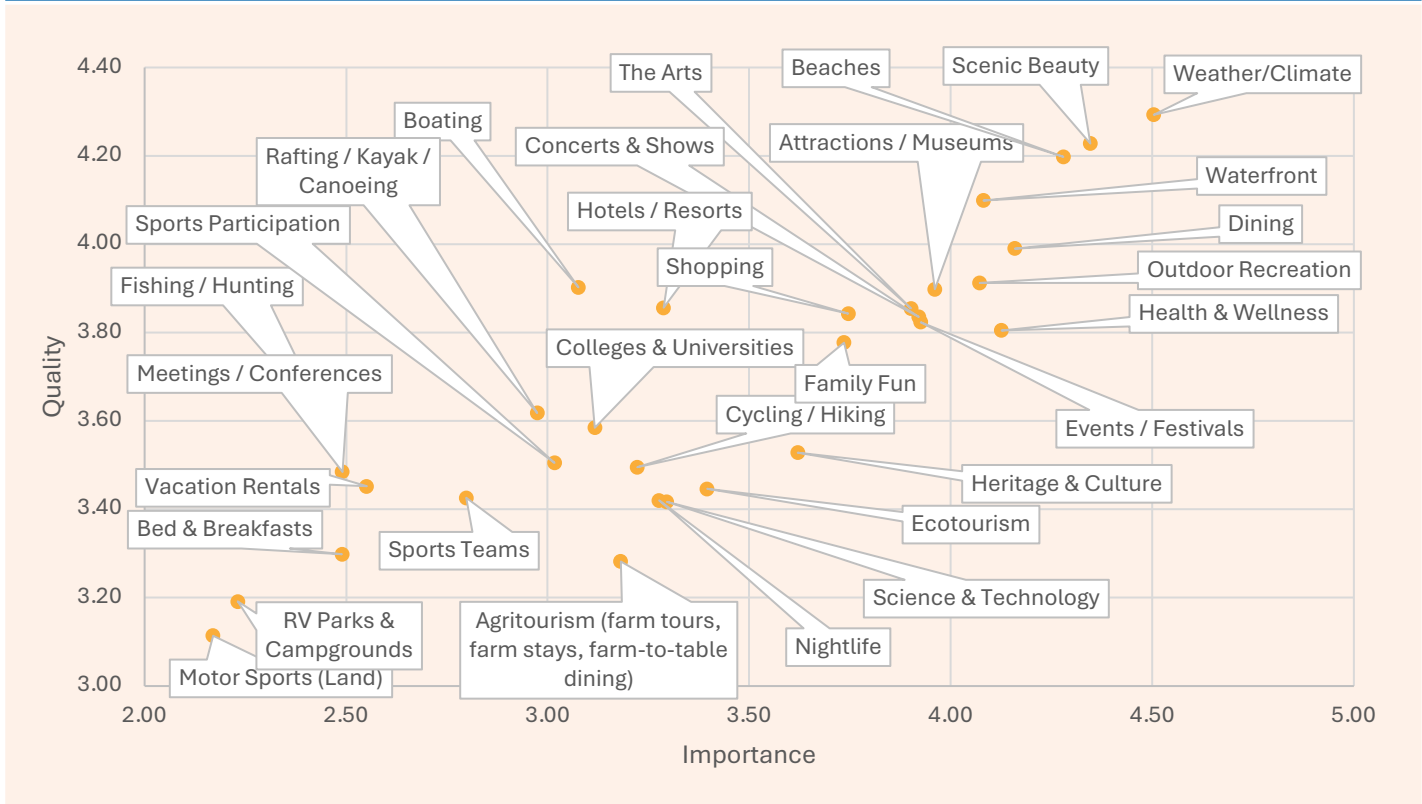
Q62 & 63. WHICH ASPECTS OF PALM BEACH COUNTY EXPERIENCE WERE (ARE) MOST IMPORTANT TO YOU IN DECIDING YOUR VISIT, AND HOW WOULD YOU RATE THE EXPERIENCE QUALITY OF EACH ASPECT IN PALM BEACH COUNTY?

Palm Beach County residents were asked to rate a range of destination aspects based on both their personal importance and their perception of local quality, using a five-point scale for each. The scatterplot below visualizes this feedback, highlighting how well the county is perceived to deliver on what residents' value most.

As with visitors, natural assets such as Weather/Climate, Scenic Beauty, and Beaches stand out in the upper-right quadrant—achieving high scores in both importance and perceived quality—reinforcing their role as foundational strengths of the destination experience. Waterfront areas, Dining, and Outdoor Recreation also scored favorably across both metrics.

Compared to visitors, residents placed slightly more importance on Health & Wellness, Shopping, and Events/Festivals, though these categories also realized more moderate quality ratings, indicating that there is still room for improved alignment between expectations and experiences. Similar to visitors, lower-rated areas such as Motor Sports, RV Parks & Campgrounds, and Agritourism received some of surveyed residents' lowest scores in both quality and importance. Interestingly, aspects like Nightlife, Science & Technology, and Vacation Rentals were generally rated lower in quality relative to their importance—mirroring patterns seen in the visitor data and possibly indicating broader service or experience gaps.

RESIDENTS (N=1,469) – IMPORTANCE VS QUALITY RATING OF PALM BEACH COUNTY EXPERIENCES/ASPECTS



Part-time residents rated Beaches, Weather/Climate, Scenic Beauty, Dining, and Outdoor Recreation as highly important, and each of these offerings also received above-average quality ratings—placing them firmly in the upper-right quadrant of the scatterplot. This mirrors sentiment shared by full-time residents and visitors, underscoring these assets as foundational to Palm Beach County’s appeal across all audience segments.

Shopping, Health & Wellness, and the Waterfront also scored favorably in both importance and quality, rounding out a cluster of consistently strong-performing features. Notably, the Waterfront appears to be valued slightly more by part-time residents than full-time ones, suggesting its particular resonance with seasonal visitors.

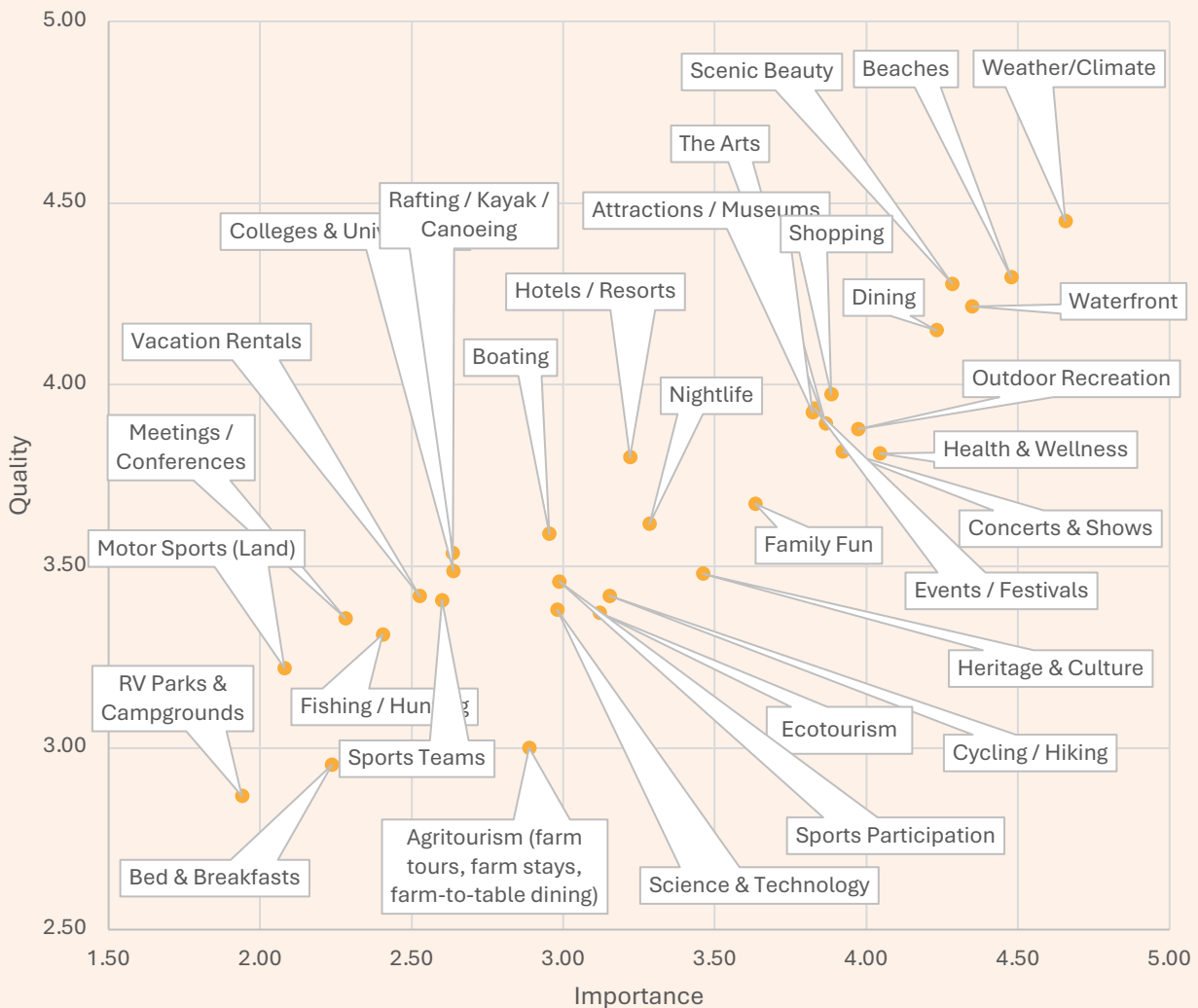
Conversely, features such as Heritage & Culture, Events/Festivals, Ecotourism, and Family Fun were rated as moderately to highly important, but with lower quality scores. These “underperforming but valued” offerings suggest opportunities for strategic enhancement. Compared to full-time residents—who rated culture and events similarly in importance but slightly higher in quality—part-time residents may be less engaged or find fewer accessible offerings during their stays.

On the lower end of the spectrum, Bed & Breakfasts, Agritourism, Fishing/Hunting, and RV Parks/Campgrounds received both low importance and quality scores. This is consistent with full-time resident sentiment and indicates they are not core tourism priorities for either segment.

One distinction is the stronger appreciation part-time residents show for Attractions/Museums, Hotels/Resorts, and The Arts, each of which received higher quality ratings compared to resident responses, suggesting a more positive visitor-facing experience among this group.

As with other groups, Nightlife hovers near the center of the chart—moderately important, with middling quality perceptions—highlighting a recurring theme that Palm Beach County’s after-hours offerings may not be a standout feature for any audience.

PART-TIME RESIDENTS (N=238) – IMPORTANCE VS QUALITY RATING OF PALM BEACH COUNTY EXPERIENCES/ASPECTS



The chart below offers a direct comparison how full-time and part-time residents of Palm Beach County rate the importance of various destination features. Positive values represent features rated as more important by full-time residents, while negative values indicate higher importance among part-time residents.

The most substantial gaps appear for Colleges & Universities (+0.48), Rafting/Kayaking/Canoeing (+0.34), and Science & Technology (+0.32), all of which are notably more important to full-time residents. This trend suggests that full-time residents place greater value on educational infrastructure and outdoor/niche recreational offerings that reflect deeper local engagement and longer-term usage.

Similarly, Agritourism, RV Parks & Campgrounds, and Ecotourism also saw higher importance ratings from full-time residents, indicating stronger appreciation among locals for rural and nature-based experiences. These activities may be less accessible or relevant for part-time residents, who often stay in more developed areas or for shorter durations.

On the other hand, a small number of features skewed more important to part-time residents, including Waterfront (-0.27), Beaches (-0.20), Weather/Climate (-0.15), and Shopping (-0.14). These are classic leisure-driven priorities, reinforcing the notion that part-time residents—who are overwhelmingly seasonal visitors—are more focused on high-impact amenities during shorter stays.

A few categories showed virtually no difference, including Concerts & Shows, Nightlife, and Vacation Rentals, indicating generally consistent importance levels across both groups.

RESIDENTS (N=1,469) & PART-TIME RESIDENTS (N=238) – DIFFERENCES IN IMPORTANCE RATINGS BETWEEN RESIDENTS AND PART-TIME RESIDENTS

	Resident	Part Time Resident	Residents vs Part-Time Visitors
Colleges & Universities	3.12	2.64	0.48
Rafting / Kayak / Canoeing	2.97	2.64	0.34
Science & Technology	3.30	2.98	0.32
Agritourism (farm tours, farm stays, farm-to-table dining)	3.18	2.89	0.29
RV Parks & Campgrounds	2.23	1.94	0.29
Ecotourism	3.40	3.12	0.28
Bed & Breakfasts	2.49	2.24	0.25
Meetings / Conferences	2.49	2.28	0.21
Sports Teams	2.80	2.60	0.20
Heritage & Culture	3.62	3.46	0.16
Attractions / Museums	3.96	3.82	0.14
Boating	3.08	2.95	0.12
Family Fun	3.74	3.63	0.10
Outdoor Recreation	4.07	3.97	0.10
Events / Festivals	3.93	3.83	0.10
Motor Sports (Land)	2.17	2.08	0.09
Health & Wellness	4.13	4.05	0.08
Cycling / Hiking	3.22	3.15	0.07
Hotels / Resorts	3.29	3.22	0.07
Scenic Beauty	4.35	4.28	0.06
Fishing / Hunting	2.46	2.40	0.06
The Arts	3.90	3.87	0.04
Sports Participation	3.02	2.99	0.03
Vacation Rentals	2.55	2.53	0.02
Concerts & Shows	3.92	3.92	0.00
Nightlife	3.28	3.28	-0.01
Dining	4.16	4.23	-0.07
Shopping	3.75	3.88	-0.14
Weather/Climate	4.50	4.66	-0.15
Beaches	4.28	4.48	-0.20
Waterfront	4.08	4.35	-0.27

The next exhibit also compares the perceptions of full-time and part-time residents but focuses on quality ratings rather than importance. Again, positive values indicate features rated more highly by full-time residents, while negative values reflect stronger quality ratings among part-time residents. While the methodology mirrors that of the previous chart, the results reveal a slightly different set of divergences between the two groups—emphasizing not just what matters to each, but how well they believe those offerings are currently delivered.

The widest quality gaps in favor of full-time residents are seen in Bed & Breakfasts, RV Parks & Campgrounds, and Boating. Each of these received quality scores at least 0.30 points higher among full-time residents, suggesting a closer or more direct relationship with these experiences. These types of amenities may be more familiar or relevant to locals, who have more time to explore them and more context for assessing their quality. Other notable features with stronger full-time resident scores include Agritourism, Fishing/Hunting, and Meetings/Conferences—aligning closely with the importance gaps identified earlier and reinforcing the view that full-time residents have deeper or more practical relationships with infrastructure, land-based recreation, and working or educational components of the visitor economy.

Part-time residents, meanwhile, rated several high-profile leisure experiences more favorably. Nightlife, Dining, and Weather/Climate all received quality scores between 0.16 and 0.20 points higher than those given by full-time residents. These are experiences likely to be top-of-mind during shorter stays, and part-time residents may be disproportionately interacting with the County's most polished or visitor-facing offerings in these categories. Other positively rated features include Shopping, Waterfront, and Events/Festivals, reinforcing the idea that part-time residents—while less engaged with niche or locally embedded features—are more likely to enjoy and endorse the traditional leisure travel pillars that characterize a seasonal destination visit.

Finally, some features—such as Health & Wellness, Attractions and Museums, The Arts, and Sports Teams—received nearly identical scores from both groups. These shared perceptions indicate areas of stable, cross-segment quality delivery, regardless of how frequently or how long residents are in the County.

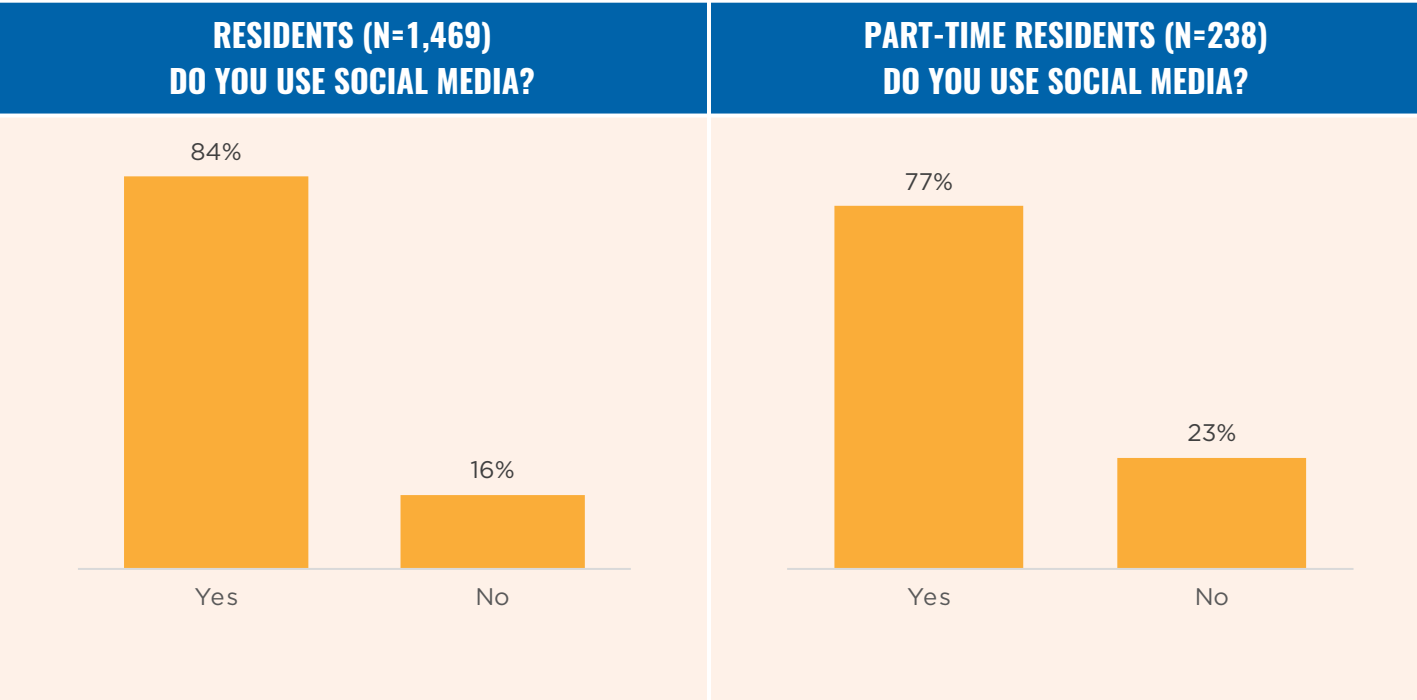
RESIDENTS (N=1,469) & PART-TIME RESIDENTS (N=238) – DIFFERENCES IN QUALITY RATINGS BETWEEN RESIDENTS AND PART-TIME RESIDENTS

	Resident	Part Time Resident	<u>Residents</u> vs Part-Time Visitors
Bed & Breakfasts	3.30	2.95	0.35
RV Parks & Campgrounds	3.19	2.87	0.32
Boating	3.90	3.59	0.31
Agritourism (farm tours, farm stays, farm-to-table dining)	3.28	3.00	0.28
Fishing / Hunting	3.58	3.31	0.27
Meetings / Conferences	3.48	3.36	0.13
Family Fun	3.78	3.67	0.11
Colleges & Universities	3.58	3.49	0.10
Rafting / Kayak / Canoeing	3.62	3.54	0.08
Cycling / Hiking	3.50	3.42	0.08
Ecotourism	3.45	3.37	0.07
Hotels / Resorts	3.86	3.80	0.06
Heritage & Culture	3.53	3.48	0.05
Sports Participation	3.51	3.46	0.05
Science & Technology	3.42	3.38	0.04
Outdoor Recreation	3.91	3.88	0.03
Vacation Rentals	3.45	3.42	0.03
Concerts & Shows	3.84	3.82	0.02
Sports Teams	3.43	3.41	0.02
Health & Wellness	3.80	3.81	-0.01
Attractions / Museums	3.90	3.92	-0.03
The Arts	3.85	3.89	-0.04
Scenic Beauty	4.23	4.28	-0.05
Beaches	4.20	4.30	-0.10
Motor Sports (Land)	3.11	3.22	-0.11
Events / Festivals	3.82	3.93	-0.11
Waterfront	4.10	4.22	-0.12
Shopping	3.84	3.97	-0.13
Weather/Climate	4.29	4.45	-0.16
Dining	3.99	4.15	-0.16
Nightlife	3.42	3.62	-0.20

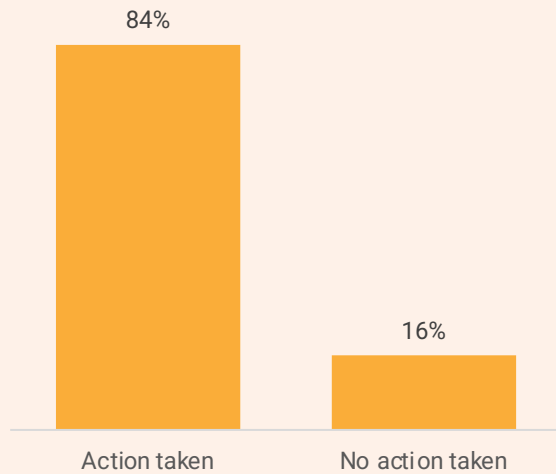
Q64 & 65. DO YOU USE SOCIAL MEDIA AND IF SO, WHICH OF THE FOLLOWING ACTIONS HAVE YOU PREVIOUSLY TAKEN ON SOCIAL MEDIA IN CONJUNCTION WITH YOUR VISIT TO PALM BEACH COUNTY?

Social media plays a meaningful role in how both residents and part-time residents engage with Palm Beach County as a destination. Eighty-four percent of residents and 77 percent of part-time residents indicated that they use social media platforms. Among these users, engagement related to Palm Beach County was relatively high for both groups—84 percent of residents and 81 percent of part-time residents reported taking at least one social media action connected to their visit or experience.

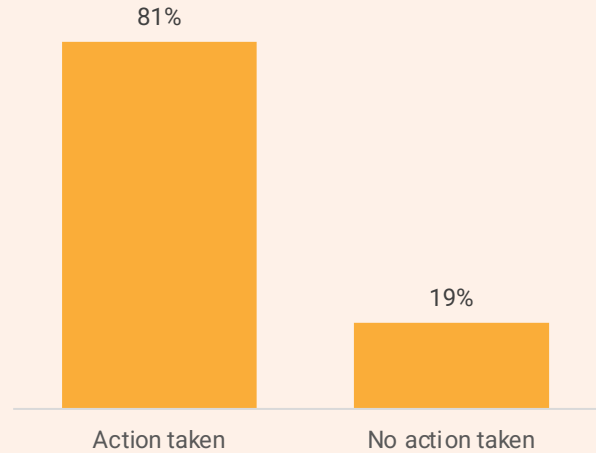
Residents were slightly more active overall, with higher shares engaging in nearly every tracked behavior. Forty-one percent followed a Palm Beach tourism account, compared to 31 percent of part-time residents, and residents were also more likely to share travel content, click through promotional posts, and leave comments. Despite lower overall participation, part-time residents still demonstrated meaningful interaction across categories, with 28 percent clicking through a Palm Beach tourism link, 26 percent making a comment, and 23 percent engaging with videos or online travel reviews. These findings indicate that both groups can serve as active digital ambassadors for the destination, but that residents may offer slightly more consistent potential for organic reach and advocacy through social platforms.



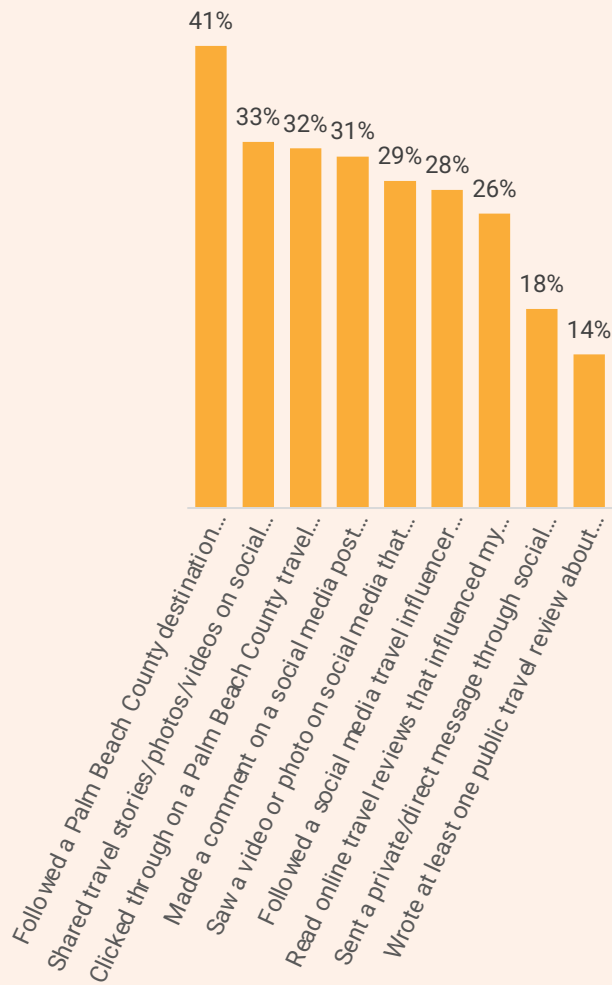
RESIDENTS (N=1,469) ANY ACTIONS TAKEN



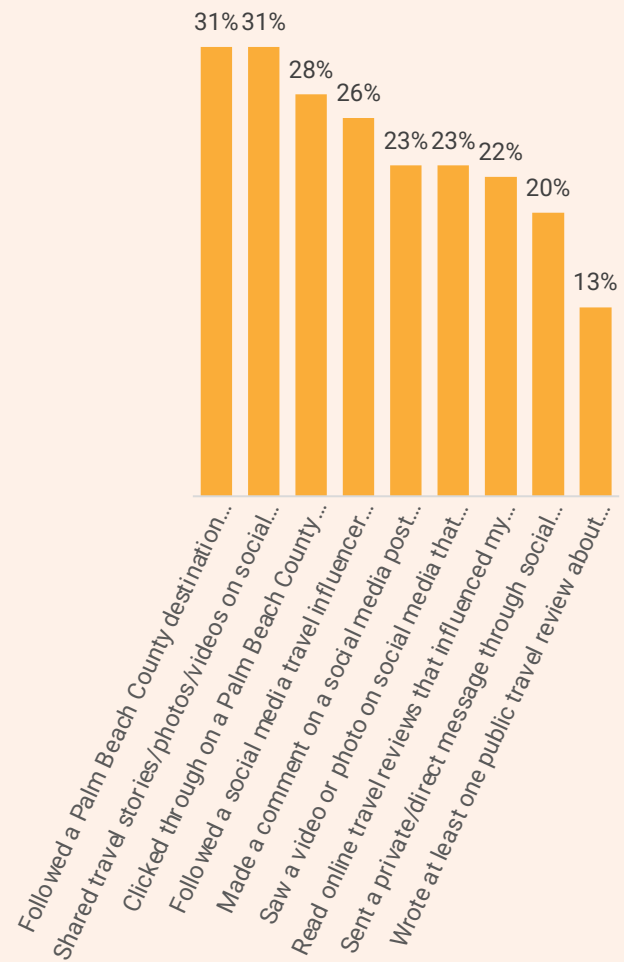
PART-TIME RESIDENTS (N=238) ANY ACTIONS TAKEN



RESIDENTS (N=1,469) ACTIONS TAKEN



PART-TIME RESIDENTS (N=238) ACTIONS TAKEN



Q66. GENERAL COMMENTS

Residents and part-time residents of Palm Beach County provided general, opened ended comments at the conclusion of the resident survey. Their feedback has been summarized in the text below.

KEY POSITIVE THEMES

- **Appreciation for the County:** Multiple comments expressed a general love or pride in Palm Beach County, including statements like “Love Palm Beach County” and references to natural assets like *“the weather, the water, and the general vibe.”*
- **Support for Sustainable Tourism:** Respondents voiced support for tourism growth as long as it’s done *“in a sustainable, smart manner.”*
- **Positive View of Growth:** A few residents acknowledged the county’s growth trajectory positively, with one stating that it is *“growing at a positive rate.”*

KEY CONCERNS OR SUGGESTIONS

- **Affordability and Cost of Living:** A recurring concern was rising housing costs, summarized in statements like: *“It is getting way too expensive to live in Palm Beach County.”*
- **Traffic and Infrastructure:** Several respondents mentioned traffic congestion, particularly during presidential visits or peak tourist periods.
- **Resident Experience vs. Tourism:** There’s an underlying tension between tourism promotion and quality of life, with one respondent stating: *“The Tourist Development Council of Palm Beach County needs to spend more time focusing on the quality of life of its residents.”*



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FROM ALL OF US AT CSL THANK YOU

MAY 2025

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