



CSL

PALM BEACH COUNTY MASTER PLAN

VISITOR SURVEY RESULTS

MAY 2025



OBJECTIVE

CSL surveyed more than 2,000 Palm Beach County (PBC) residents, part-time residents, and visitors to evaluate overall and group-specific satisfaction with the County's tourism services, accommodations, and amenities. The following report presents an analysis of responses provided by survey participants who identified as visitors to PBC. We begin with a summary of key findings and takeaways, followed by detailed analysis of individual survey questions answered by the visitor cohort.

SUMMARY

This visitor survey provides a comprehensive snapshot of the PBC travel experience, revealing an overall positive perception of the destination and a visitor base that is older, affluent, and highly loyal. Respondents demonstrate strong emotional connections to the destination, particularly its natural beauty, beaches, and lifestyle offerings. Visitor satisfaction is high, with many travelers indicating intentions to return, and a significant portion already engaging in repeat visitation. While some infrastructure-related concerns were identified—particularly regarding traffic, parking, and affordability—the County's core strengths remain well aligned with its most important visitor segments.

Key considerations that emerge from the data include:

- PBC continues to attract a mature and affluent audience, with visitation skewing toward older adults, high-income households, and married couples or adult-only travel parties.
- Visitor satisfaction is strong and improves after visitation, reinforcing the power of word-of-mouth and the value of first-hand experience.
- Beaches, scenic beauty, and the dining/waterfront lifestyle are at the core of the County's brand identity and are perceived as both high quality and high importance among surveyed visitors.
- There is opportunity to diversify the visitor experience through expanded entertainment, events, and accessible attractions that could help extend stays and encourage return travel.
- Social media plays a meaningful role in inspiring visits, sharing experiences, and maintaining destination visibility.
- The County's positioning as a premium lifestyle destination is well established, but affordability, accessibility, and mobility will be key areas of focus for sustaining growth and improving equity of experience.

KEY DEMOGRAPHICS

- The visitor base skews older: 75% of respondents were aged 55 or older.
- Visitors are predominantly White/Caucasian (83%), with income levels trending high—44% earn over \$100,000 annually, and 27% over \$150,000.
- Employment status was split between full-time workers (43%) and retirees (41%), reflecting a dual appeal to both professionals and leisure-focused travelers.
- Most respondents travel without children, often as part of a couple, reinforcing the County's appeal as an adult-focused destination.
- International visitation made up 6% of the sample, with Canada the dominant foreign market, followed by Brazil, the UK, and Colombia.
- Florida residents were the largest domestic source market (36%), followed by strong representation from New York, New Jersey, and Illinois.

THEIR VISIT(S)

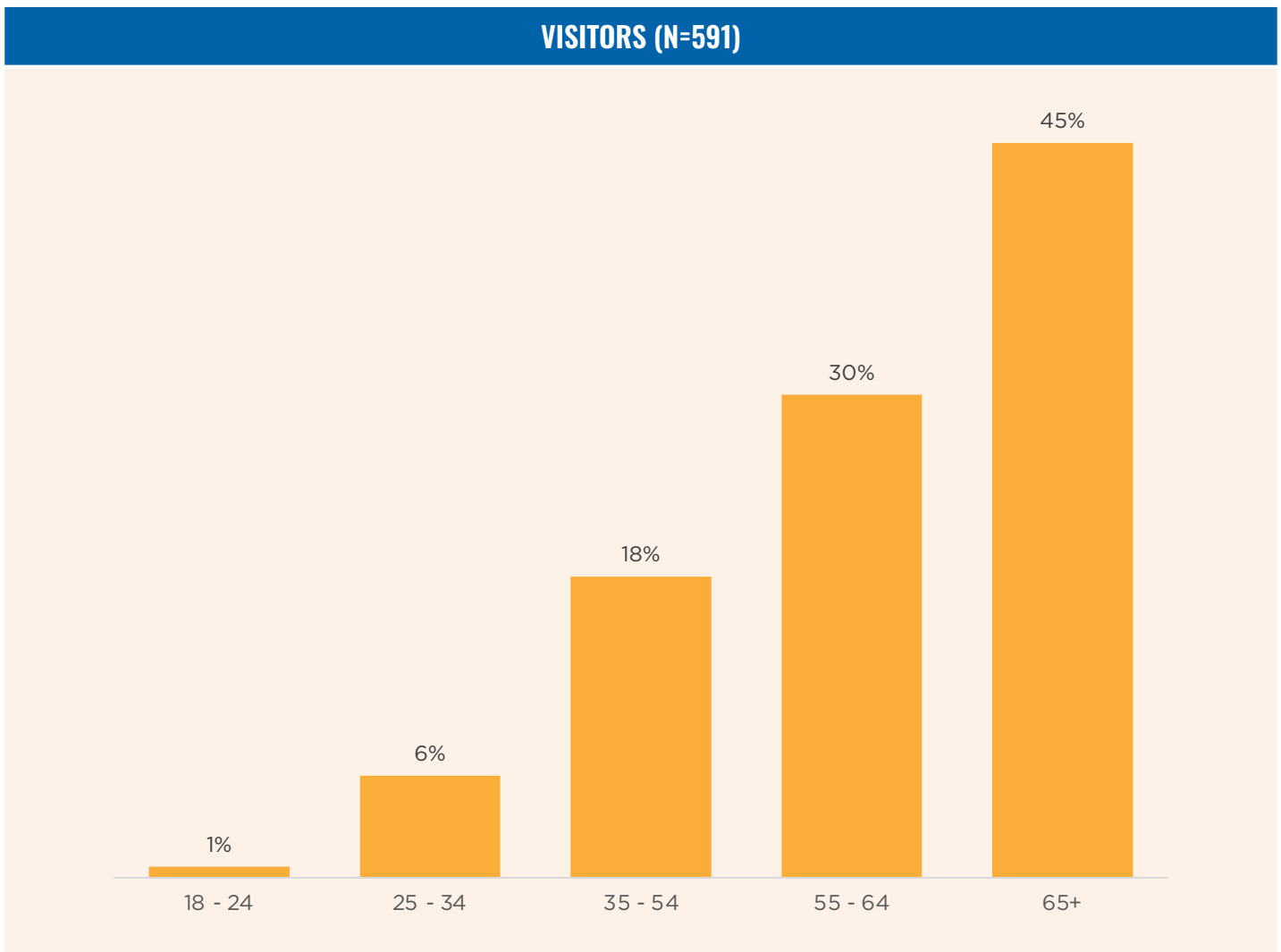
- The most-visited communities included West Palm Beach, Palm Beach, Jupiter, Palm Beach Gardens, Boca Raton, and Delray Beach.
- 73% of respondents visited in 2024, with peak visitation in December, February, and March, confirming PBC's role as a winter destination.
- 60% of respondents are repeat visitors, while 13% were first-time guests—an unusually high loyalty rate.
- Most travel parties consist of married couples (37%) or small families, with relatively low representation of multigenerational groups.
- 33% of visitors stayed 7+ nights, and 68% stayed 3+ nights, indicating long-stay potential and alignment with “slow travel” trends.
- Lodging was led by traditional hotels (38%), but 38% used accommodations that do not generate local lodging tax (e.g., staying with friends/family or day trips).
- Main reasons for visiting were vacation (50%) and visiting friends/family (27%).
- Visitors expressed interest in extending their stay or visiting more often if affordability, events, and transportation options improved.
- Beaches, museums, and shopping districts stood out as most-loved experiences, while parking, traffic, and overcrowded beaches were common frustrations.
- Social media is widely used: among users (83%), the majority took travel-related actions like following destination accounts, viewing promotional content, or sharing their own.

THEIR PERCEPTIONS

- Visitor perceptions improved after their trip—the percentage of respondents rating the County as “Excellent” rose from 49% pre-visit to 66% post-visit.
- Visitors are highly satisfied overall, but open-ended feedback points to improvements in transportation, affordability, and beach access as key areas of opportunity.
- Visitors rated beaches, weather/climate, scenic beauty, dining, and waterfront as both highly important and high quality—no major performance gaps emerged, which suggests Palm Beach County is effectively delivering on its core value proposition.
- Lower-importance attributes such as ecotourism, agritourism, and science/technology may represent emerging or niche growth opportunities.
- Residents and visitors diverged on certain priorities: residents value community-facing assets (e.g., colleges, health care, youth sports), while visitors focus more on experiential amenities like beaches, lodging, and dining.
- Quality ratings were generally higher among visitors across most categories, especially in vacation-specific areas (e.g., hotels, vacation rentals, nightlife). This may reflect the enhanced perceptions of leisure travelers during peak or curated experiences, compared to residents’ more routine-based impressions.

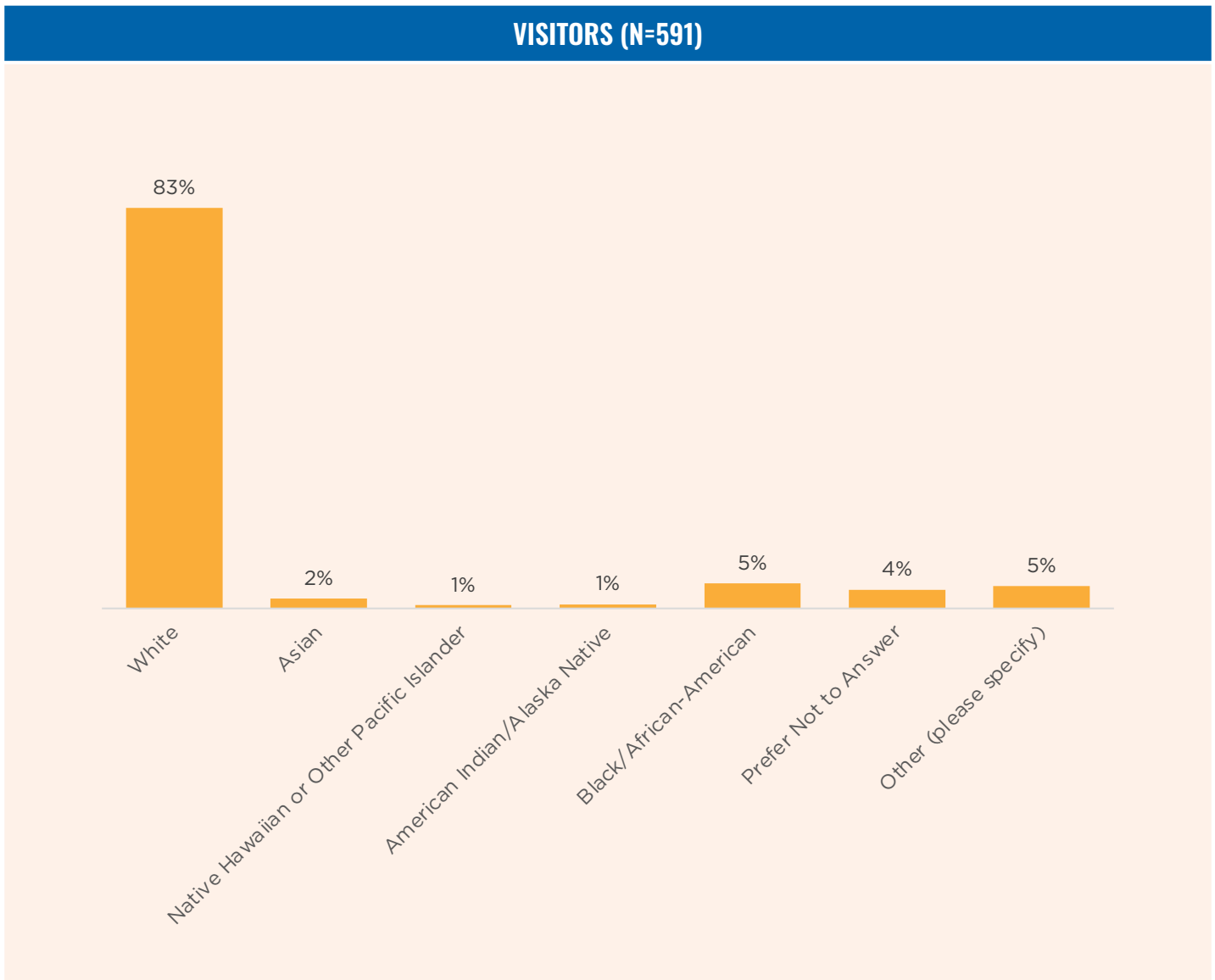
Q1. PLEASE INDICATE YOUR AGE GROUP

CSL surveyed Palm Beach County visitors regarding various demographic characteristics, beginning with age group. The sample of respondents skewed significantly older, with nearly half (45%) indicating they were 65 years of age or older. An additional 30% fell between the ages of 55 and 64, meaning that three-quarters of surveyed visitors were over the age of 55. By comparison, 61% of Palm Beach County resident respondents fell into this age range, indicating that the visitor base trends even older than the local population. These findings suggest that Palm Beach County continues to attract a predominantly older visitor base. As such, destination marketing and product development strategies may benefit from a continued focus on amenities, experiences, and communications that resonate with older adults, while at the same time exploring opportunities to engage with potential visitors in the 35-54 age group, helping to establish a next generation of visitor.



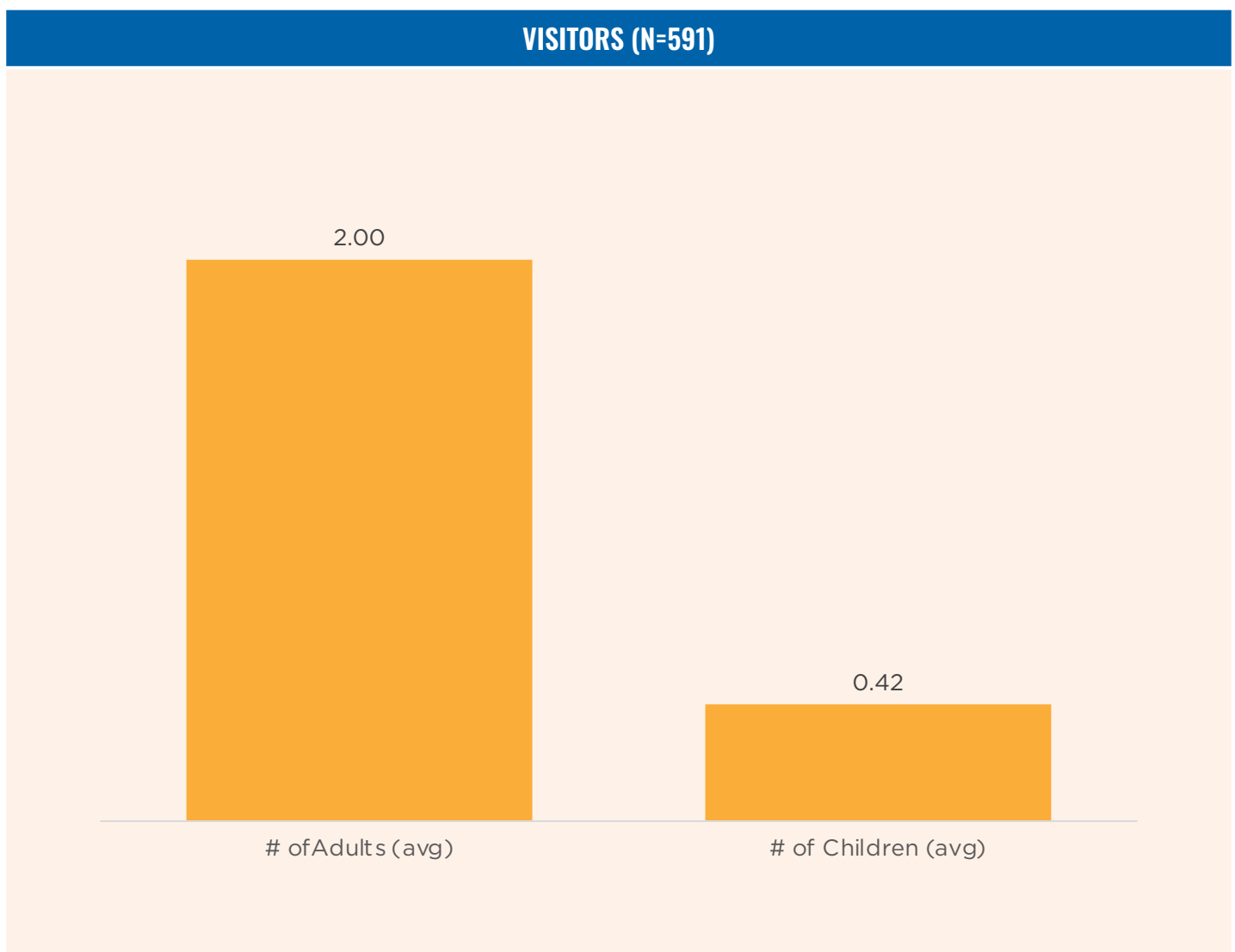
Q2. TO MAKE SURE WE ARE REPRESENTING THE VIEWS OF A BROAD MIX OF PEOPLE, PLEASE INDICATE THE ETHNIC / RACIAL GROUP TO WHICH YOU BELONG (CHECK ALL THAT APPLY)

The visitor survey respondent pool comprises primarily White or Caucasian individuals, who accounted for 83 percent of responses. This proportion is comparable to the rate of White/Caucasian respondents among full-time residents (80 percent) and part-time residents (92 percent).



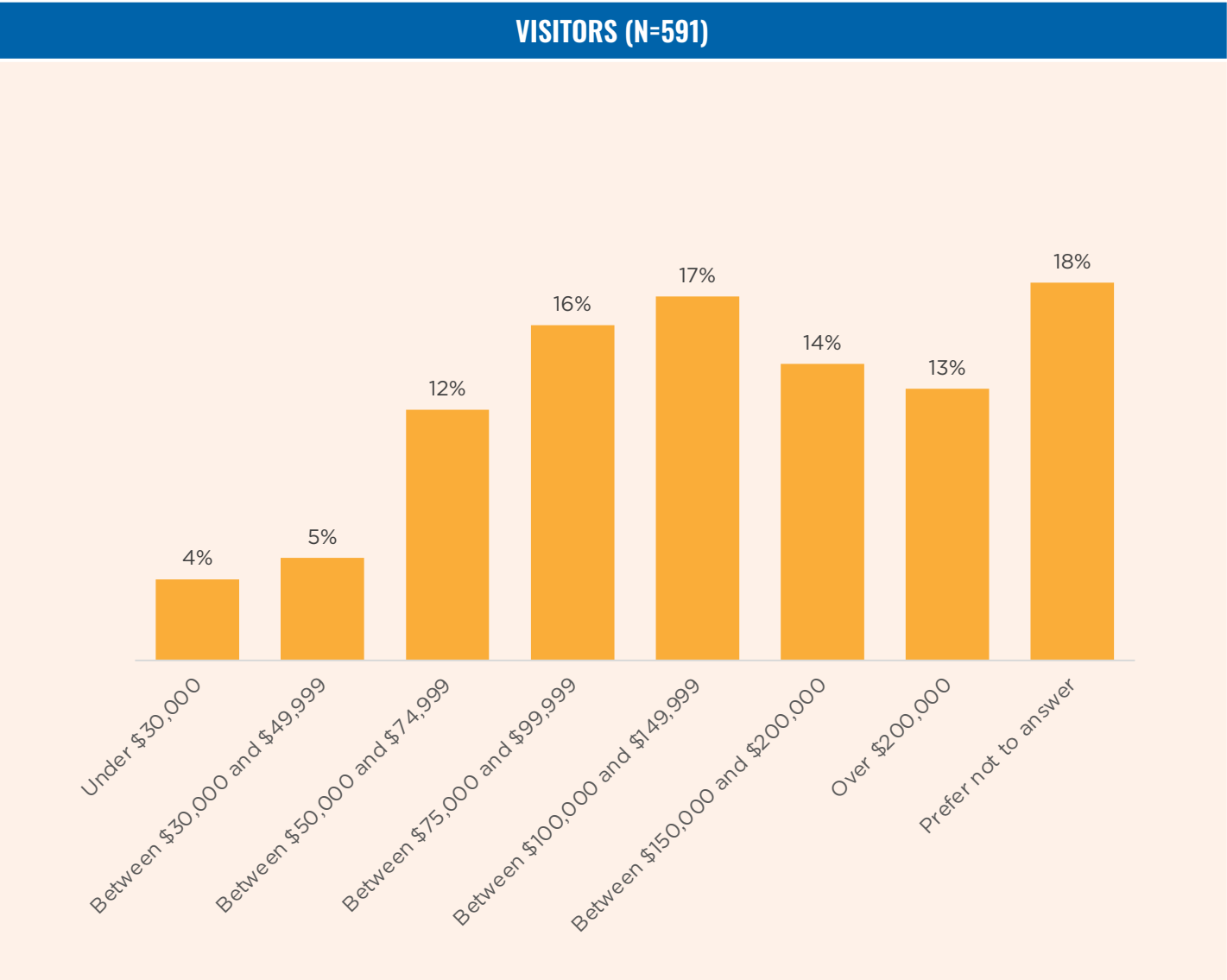
Q4. INCLUDING YOURSELF, HOW MANY ADULTS AND CHILDREN 18 YEARS OR YOUNGER LIVE IN YOUR HOUSEHOLD?

Respondents were also asked to report the number of adults and children in their household. Collected data shows that the average Palm Beach County visitor travels with approximately two adults and fewer than one child (0.42). When viewed alongside the age-related demographic findings, this further supports the idea that the typical visitor is part of an older adult couple. This is reinforced by later results showing that 37 percent of respondents identified as traveling as a married couple. Overall, the data suggests that Palm Beach County continues to draw older, adult-focused travel parties, with relatively limited representation of families with children.



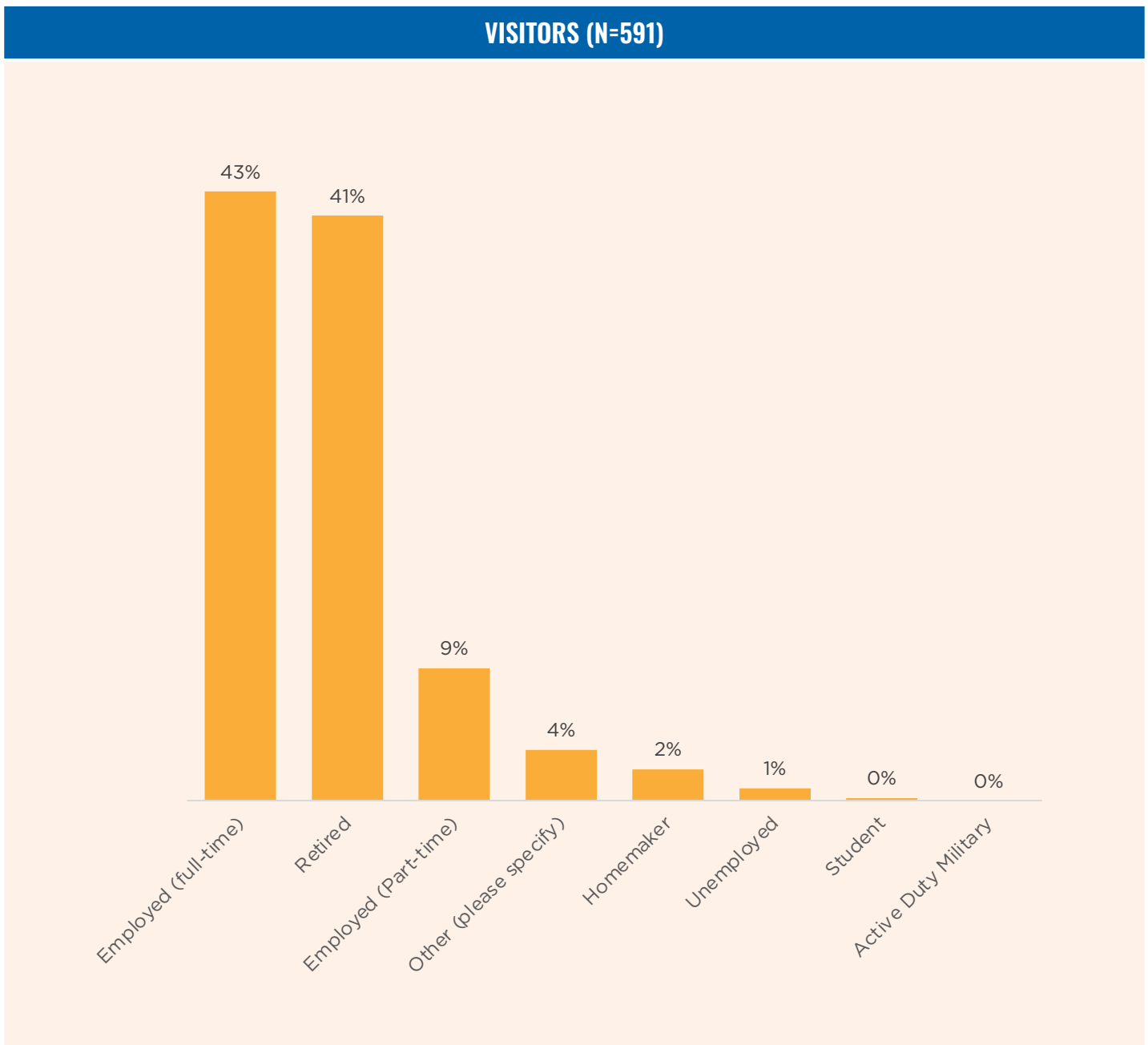
Q5. WHICH OF THESE RANGES INCLUDES YOUR TOTAL ANNUAL HOUSEHOLD INCOME, BEFORE TAXES, IN 2024?

Palm Beach County’s visitor base, as represented by a sample of nearly 600 previous visitors, is relatively affluent. Forty-four (44) percent of respondents reported a household income of over \$100,000, and 27 percent indicated household incomes exceeding \$150,000 annually. These figures are comparable to the County’s full-time resident respondents, 46 percent of whom reported household incomes above \$100,000. Overall, visitor income levels appear to skew higher than state and national averages, where median household incomes fall below \$75,000. However, it is important to note that survey responses may reflect a degree of self-selection bias, and actual visitor income distribution may be somewhat broader than represented in the sample.



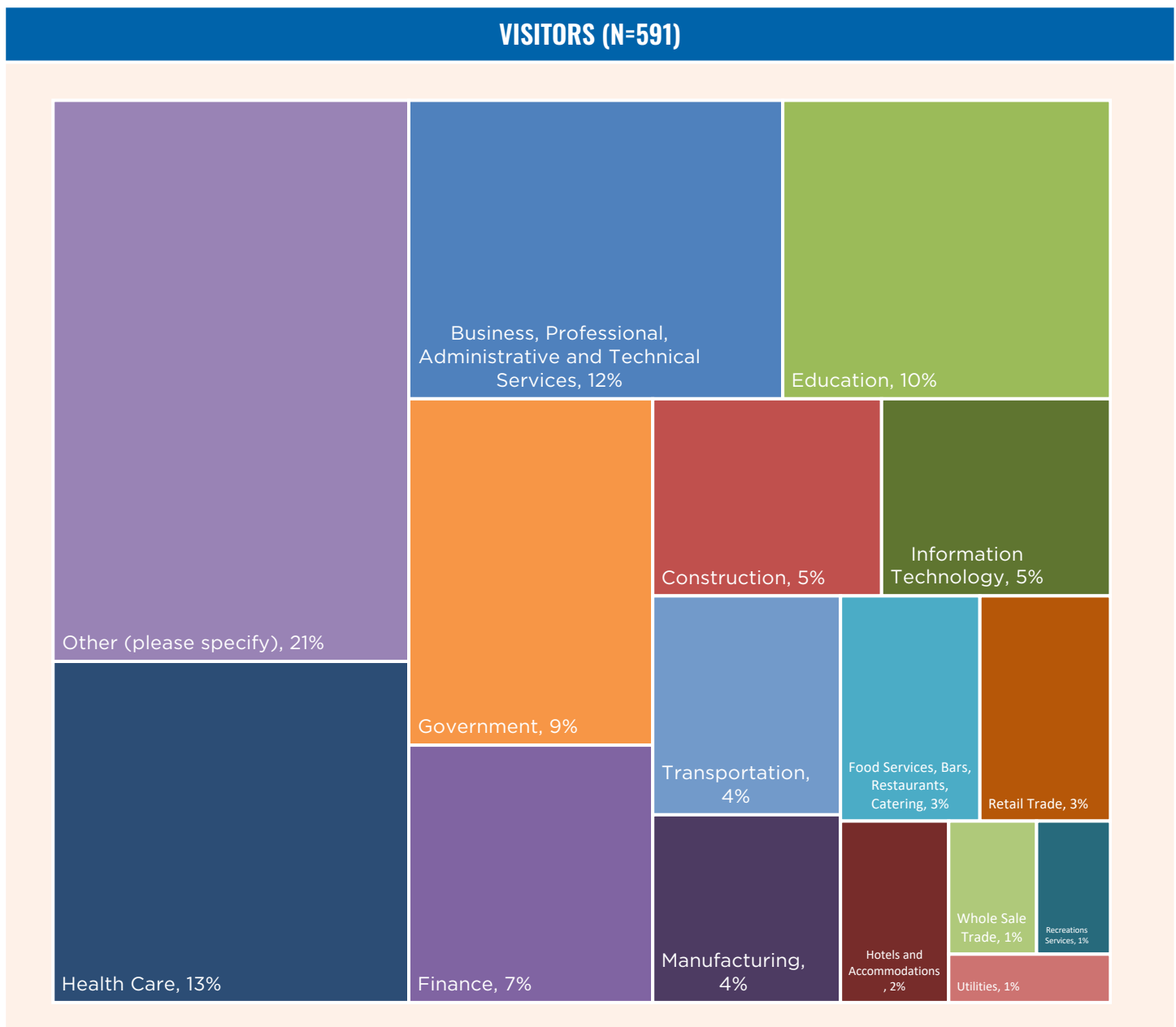
Q6. WHAT IS YOUR CURRENT EMPLOYMENT STATUS?

CSL also asked PBC visitors to report their current employment status. As shown in the chart below, the respondent pool was nearly evenly split between full-time employees (43 percent) and retirees (41 percent), reflecting the County's dual appeal to both working professionals and older, leisure-oriented travelers. An additional nine percent reported being employed part-time. Fewer than 10 percent of respondents identified as homemakers, unemployed, students, active-duty military, or selected "other." For respondents who reported being employed (either full- or part-time), data related to their industry of employment is detailed on the following page.



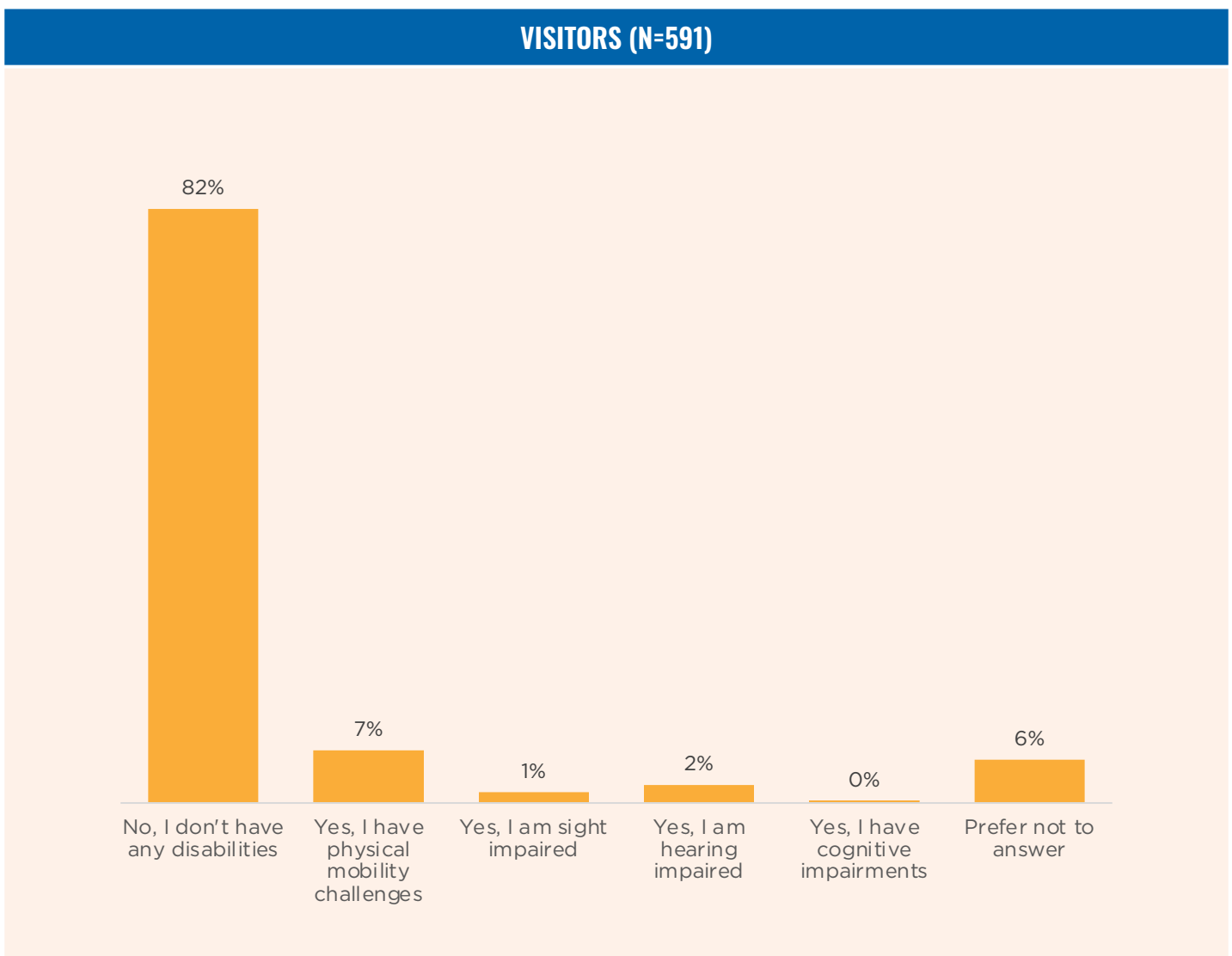
Q7. WHICH OF THE FOLLOWING BEST CHARACTERIZES THE INDUSTRY IN WHICH YOU ARE EMPLOYED?

PBC visitors were asked to indicate the primary industry in which they are employed. The most common response was “Other,” selected by 21 percent of respondents. Open-ended responses within this category referenced fields such as arts and media, travel and tourism, nonprofit work, real estate, and retired professionals. Among predefined options, key industries included Health Care (13 percent), Business, Professional, Administrative, and Technical Services (12 percent), Education (10 percent), Government (9 percent), and Information Technology (5 percent). Overall, the County’s visitor base reflects a broad mix of professional backgrounds, contributing to a diverse and multifaceted visitor profile.



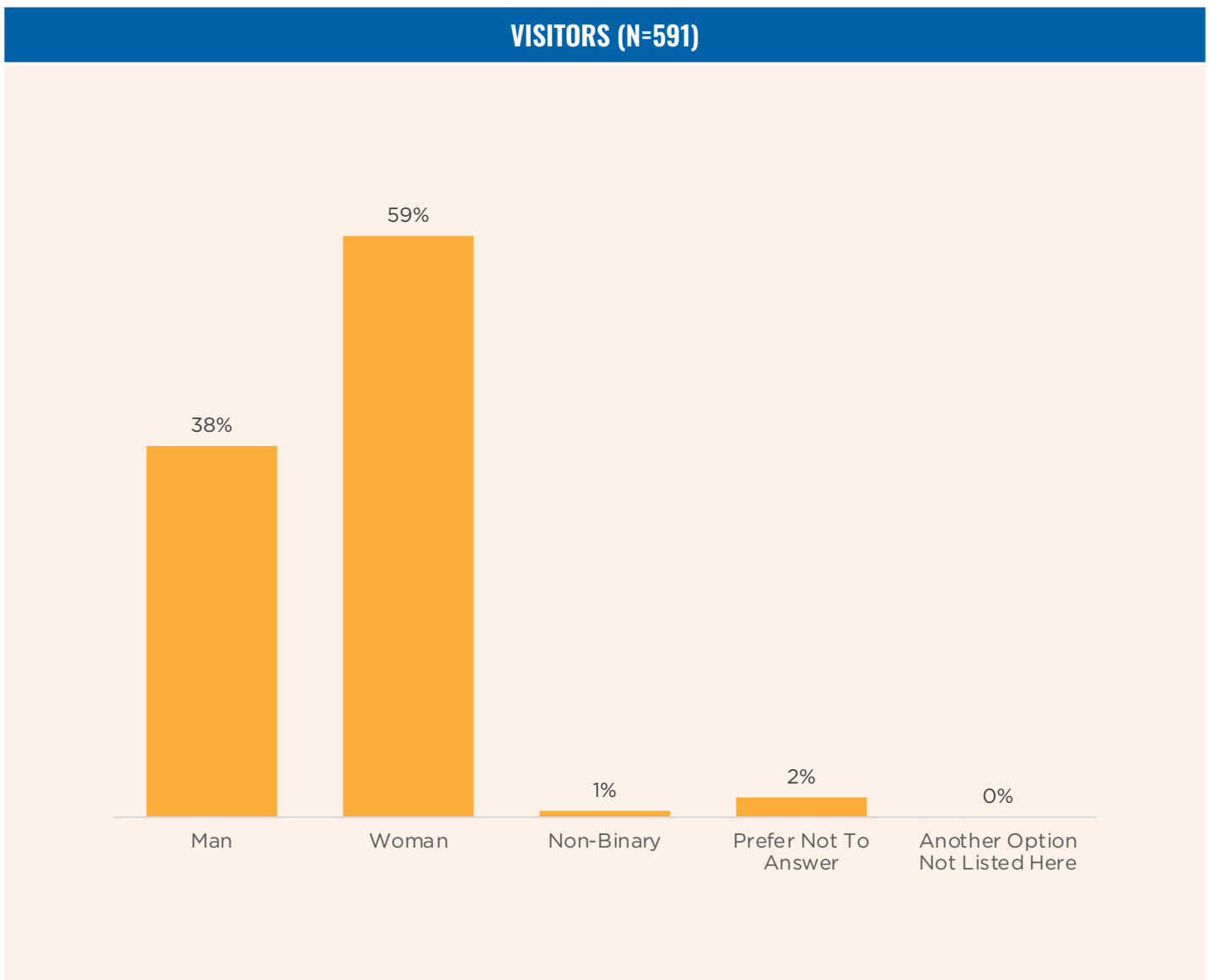
Q8. DO YOU HAVE ANY DISABILITIES? PLEASE SELECT ALL THAT APPLY.

Visitors were also asked to report whether they live with a disability. Because this was a “select all that apply” question, these categories are not mutually exclusive, and some respondents selected more than one type of disability. Approximately 82 percent of respondents indicated they do not have any disabilities, while an additional 6 percent preferred not to answer. Seven percent reported experiencing physical mobility challenges, and three percent indicated they have either a hearing or vision impairment.



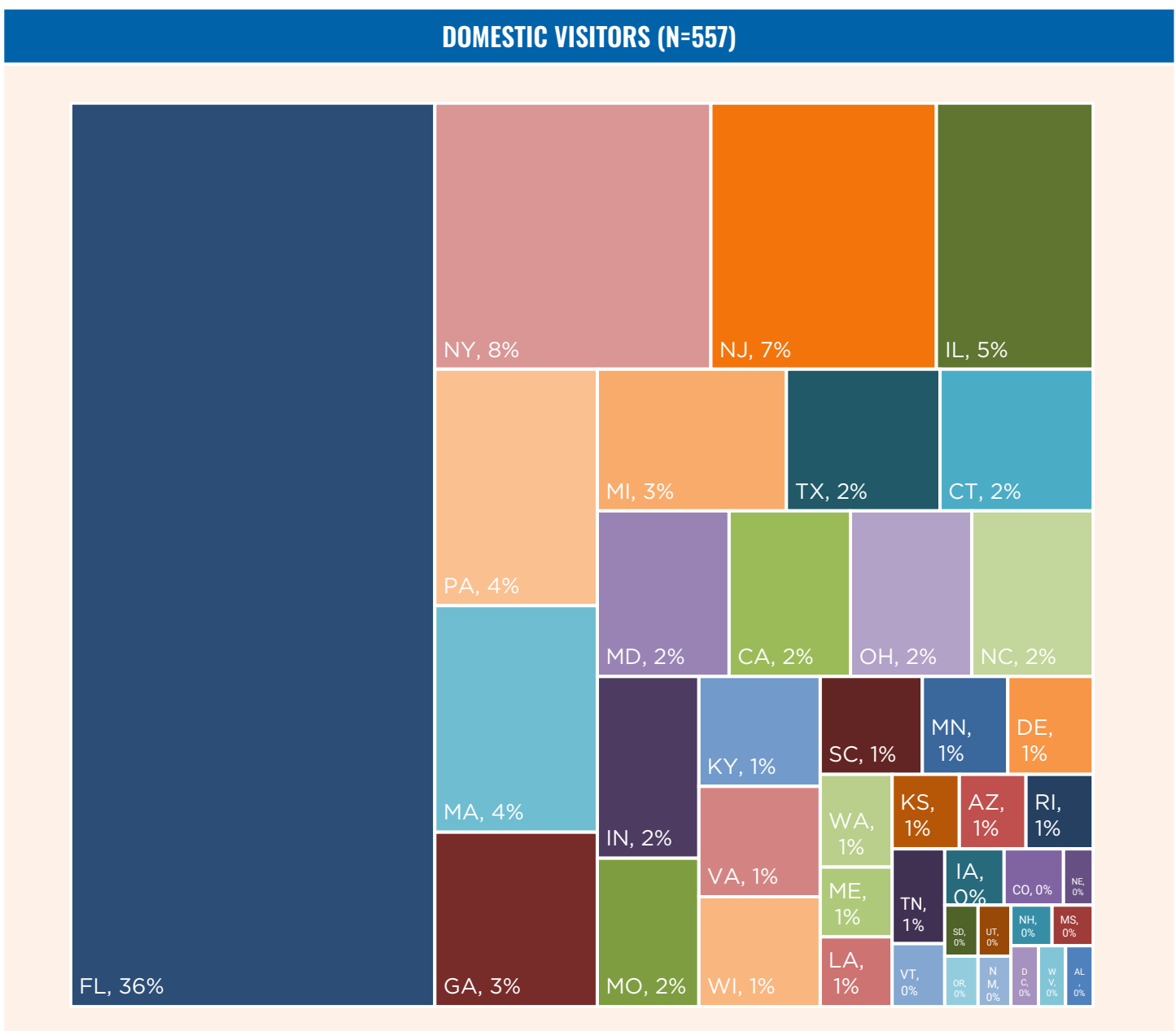
Q9. WHICH GENDER(S) DO YOU IDENTIFY WITH? PLEASE SELECT ALL THAT APPLY.

Finally, visitors were asked to indicate the gender(s) with which they identify. The respondent pool skewed notably toward female-identifying individuals, who accounted for nearly 60 percent of all responses. Another 38 percent identified as male, while the remaining three percent identified as non-binary or preferred not to answer.



Q13. IN WHICH US STATE DO YOU RESIDE (DOMESTIC VISITORS)?

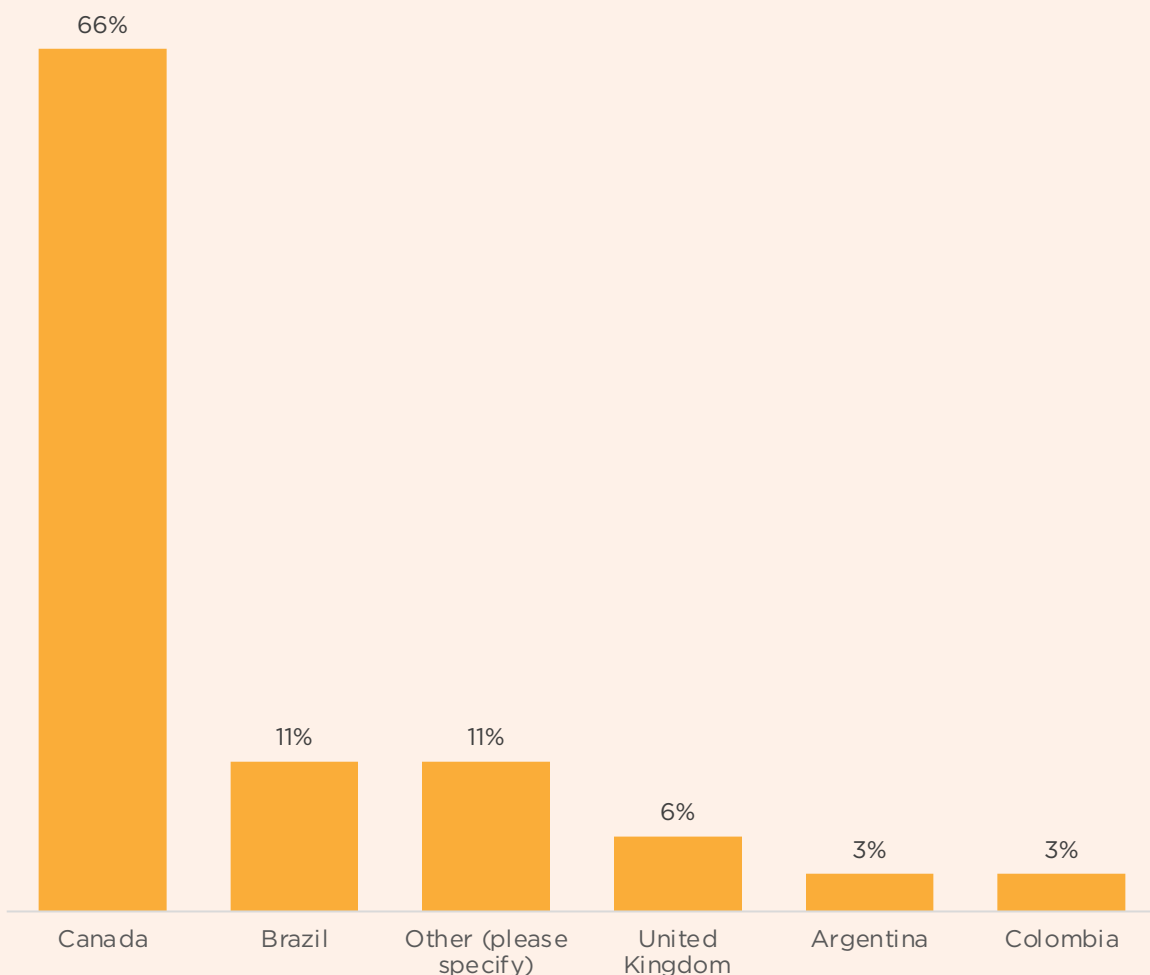
To identify visitor origin, CSL first asked Palm Beach County visitors whether they resided domestically or internationally. Among domestic respondents, 36 percent reported residing in the state of Florida—more than four times higher than the next most common state of origin. This is expected given the drivability of the market for Florida residents, a pattern further supported by mode-of-transportation data presented later in this report. Outside of Florida, the Northeast region was especially well represented, with eight percent of respondents from New York and seven percent from New Jersey. Chicago also emerged as a key market, with Illinois accounting for five percent of responses.



Q12. IN WHICH COUNTRY DO YOU CURRENTLY RESIDE (INTERNATIONAL VISITORS)?

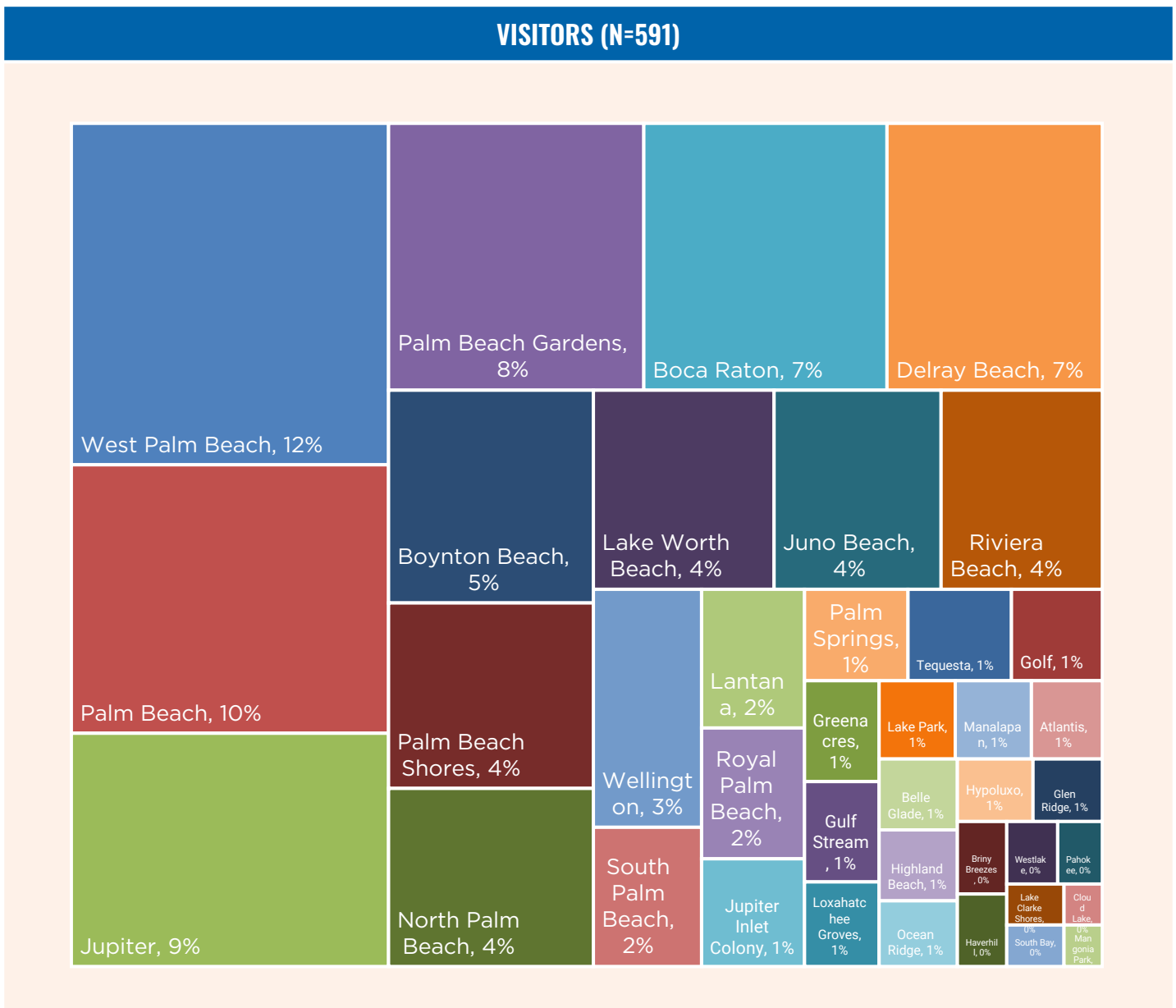
International visitors, who represent six percent of total survey respondents, were asked to indicate their country of residence. In line with anecdotal insights from CSL's stakeholder engagement process and data previously collected by Discover The Palm Beaches, the survey results show that Palm Beach County is a particularly popular destination among Canadians, who accounted for two-thirds of all international respondents in this survey. Brazil (11 percent), the United Kingdom (six percent), and Argentina and Colombia (three percent each) were also notable countries of origin. Among the 11 percent of respondents who selected "Other," identified countries included Puerto Rico, Panama, and Ireland.

INTERNATIONAL VISITORS (N=35)



Q45. DURING YOUR MOST RECENT VISIT, WHAT COMMUNITIES/AREAS DID YOU VISIT? SELECT ALL THAT APPLY.

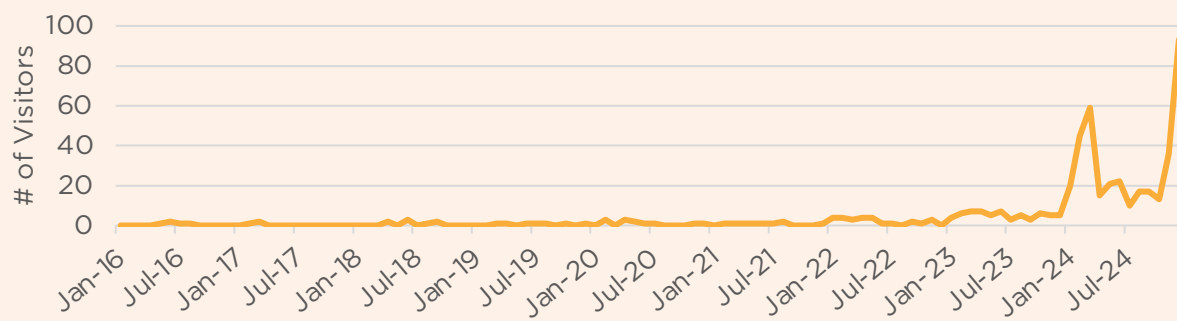
To better understand the geographic distribution of visitation across Palm Beach County's more than 2,000 square miles, respondents were asked to select all the communities or municipalities they visited during their most recent trip. A clear top six emerged: West Palm Beach (12 percent), Palm Beach (10 percent), Jupiter (nine percent), Palm Beach Gardens (eight percent), Boca Raton (seven percent), and Delray Beach (seven percent). Excluding the Town of Palm Beach, these are also among the largest municipalities in the County, making their high visitation shares expected. This analysis highlights the areas currently drawing the greatest share of visitor activity, while also pointing to an opportunity for the County to further disperse tourism across less-visited communities, especially those with under-leveraged cultural, recreational, or natural assets.



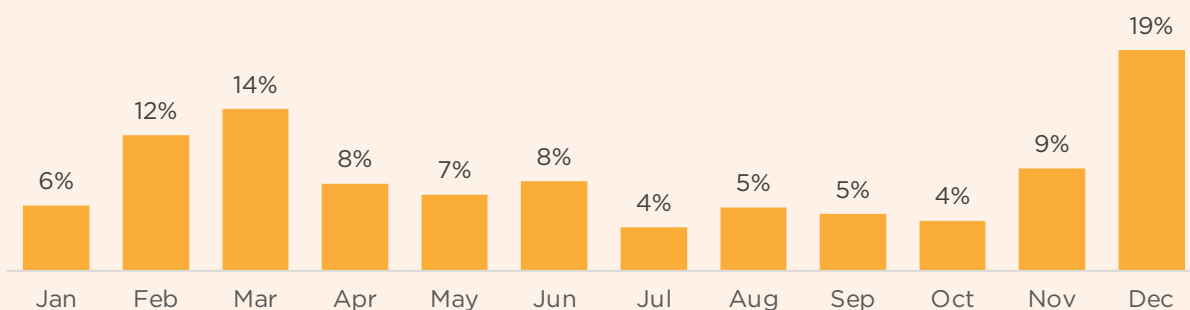
Q46. WHEN WAS YOUR LAST VISIT TO PALM BEACH COUNTY?

PBC visitors were asked to indicate the month and year of their most recent visit. These data are presented below as a timeline of visitation and a breakdown by month, regardless of year. A large majority of respondents—73 percent—reported visiting between January and December 2024. This recency strengthens the value of their feedback throughout this report, as their impressions are more likely to be current, detailed, and actionable. When looking at visit timing by month (across all years), December emerged as the most common travel month, with 19 percent of respondents indicating a December visit. Late winter and early spring were also peak visitation periods, with February and March accounting for 12 and 14 percent of responses, respectively. Combined, these three months represent 45 percent of all reported visits. This seasonal pattern reinforces Palm Beach County's strength as a winter destination and highlights the importance of programming and marketing strategies that align with peak seasonal travel.

VISITORS (N=591) – MONTH/YEAR OF LAST VISIT



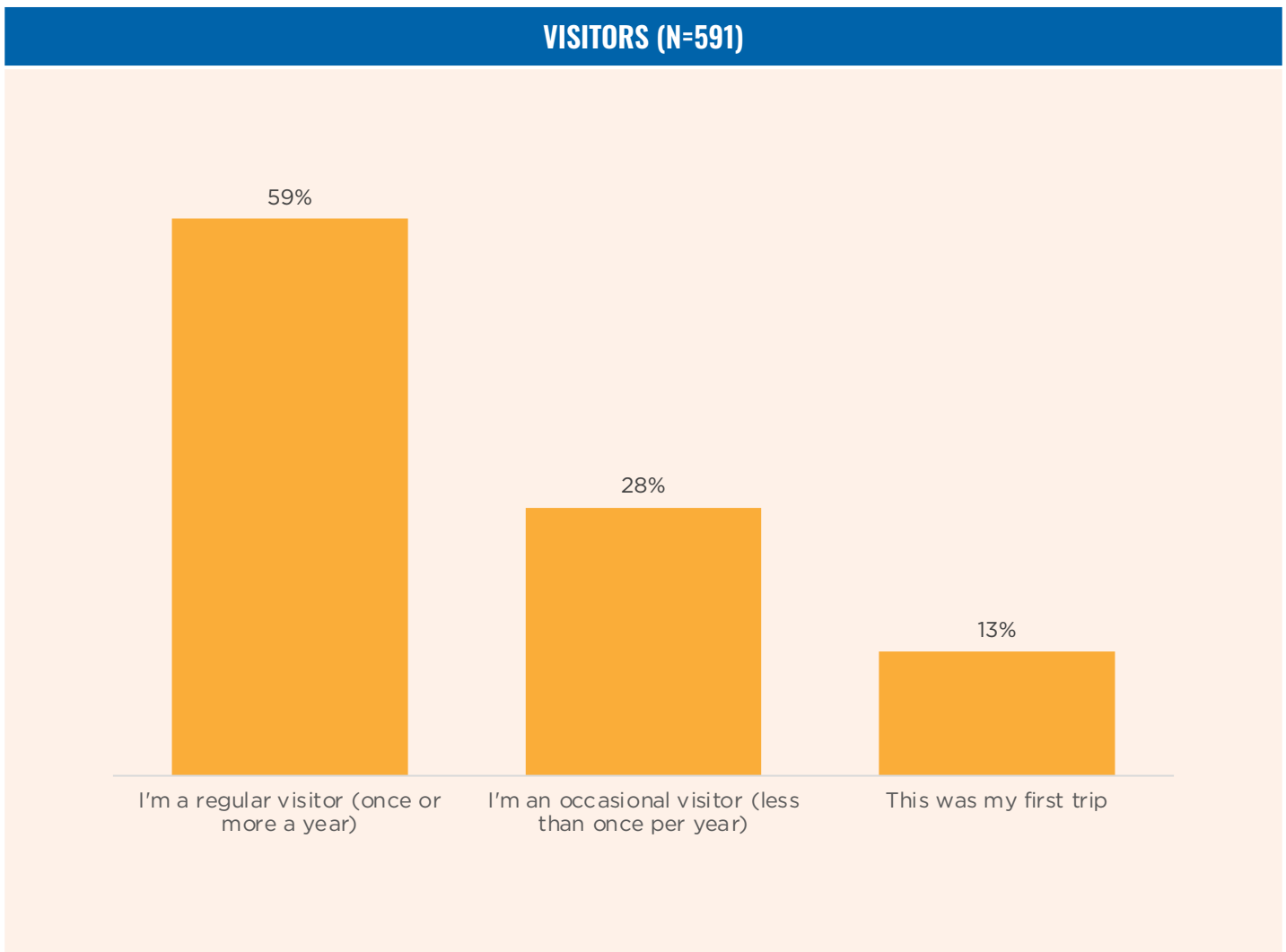
VISITORS (N=591) – LAST VISIT BY MONTH



Q47. HOW FREQUENTLY DO YOU COME TO PALM BEACH COUNTY?

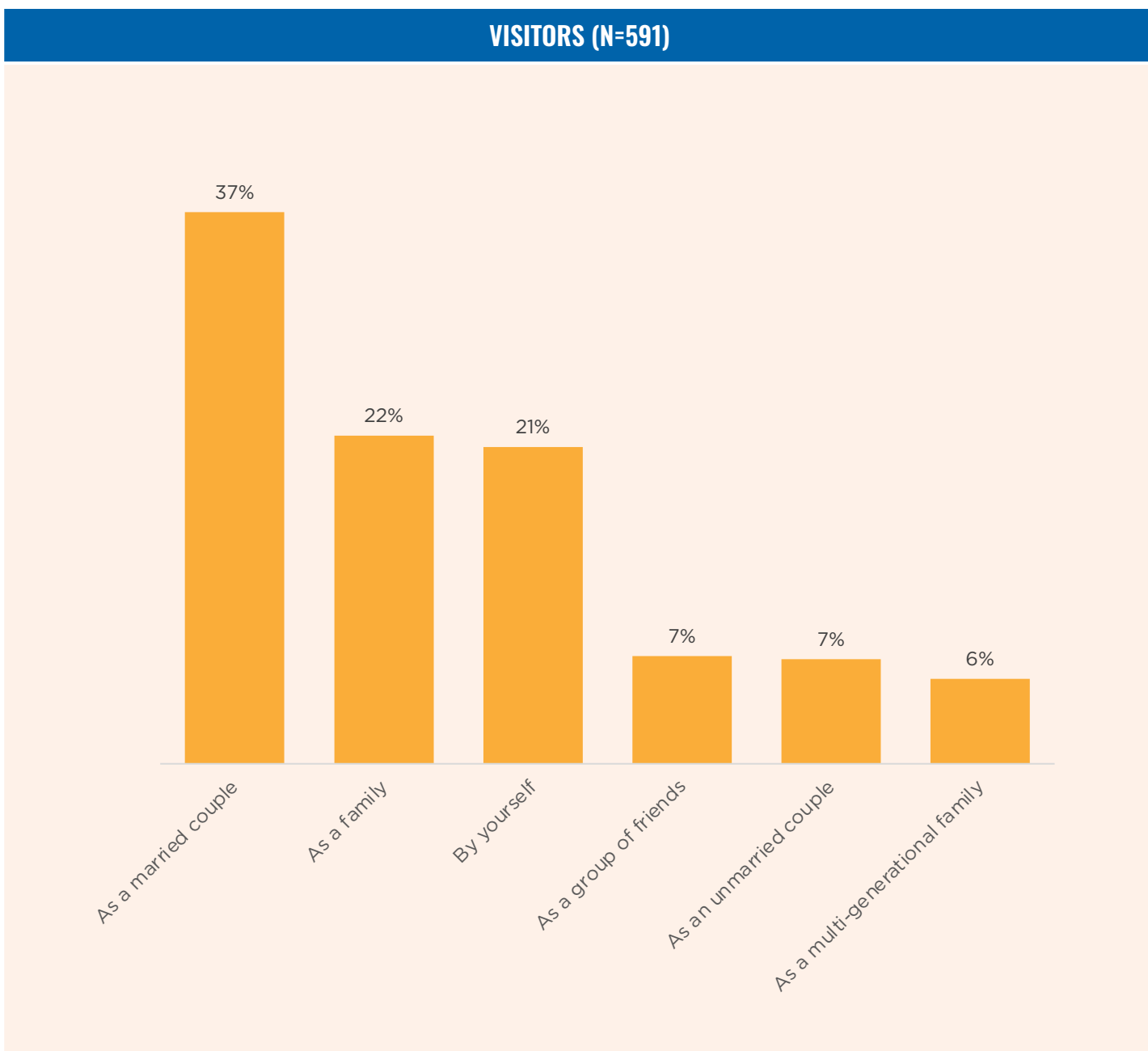
Nearly sixty percent of surveyed visitors are regulars, meaning they travel to PBC at least once per year or more frequently. This rate of repeat visitation is notably high compared to other destination studies conducted by CSL in recent years, underscoring the County's strong base of loyal, returning visitors. Occasional visitors—those who visit less than once per year—accounted for 28 percent of the sample, while 13 percent indicated that their most recent trip was their first-ever visit to the area.

This high level of repeat visitation suggests strong destination satisfaction, sustained appeal, and a well-established brand identity among core visitor markets. It also highlights the importance of maintaining high-quality experiences and ongoing engagement with this returning segment—while still leaving room to grow overall visitation through targeted strategies aimed at first-time and infrequent travelers.



Q47. DID YOU TRAVEL...

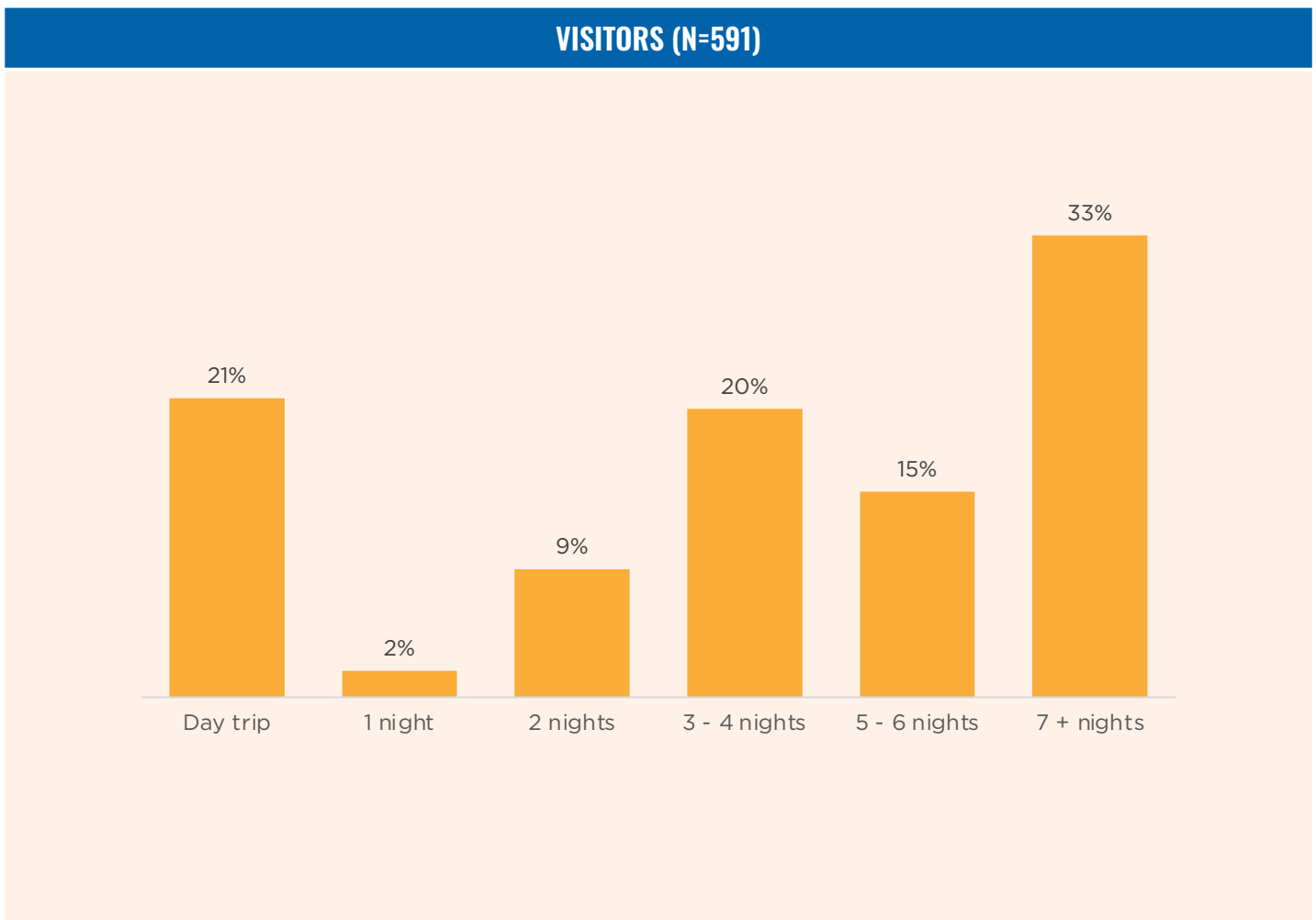
Married couples, who represent 37 percent of visitor respondents, were the most common travel party type within the survey sample. Single-generation families (22 percent) and individuals (21 percent) also made up a significant portion of respondents. The remaining 20 percent were nearly evenly distributed among friend groups, unmarried couples, and multi-generational families. These patterns suggest that Palm Beach County's tourism offerings should continue to emphasize experiences suited to couples and small family units, while also considering flexible accommodations and programming that appeal to a broader range of group types.



Q49. HOW LONG DID YOU STAY IN PALM BEACH COUNTY DURING YOUR LAST VISIT?

Length of visitation was also measured as part of the survey. While 21 percent of visitors indicated their trip was a day visit, the overall data skew toward longer stays. One-third of respondents (33 percent) reported staying seven or more nights, and approximately 68 percent stayed for three or more nights.

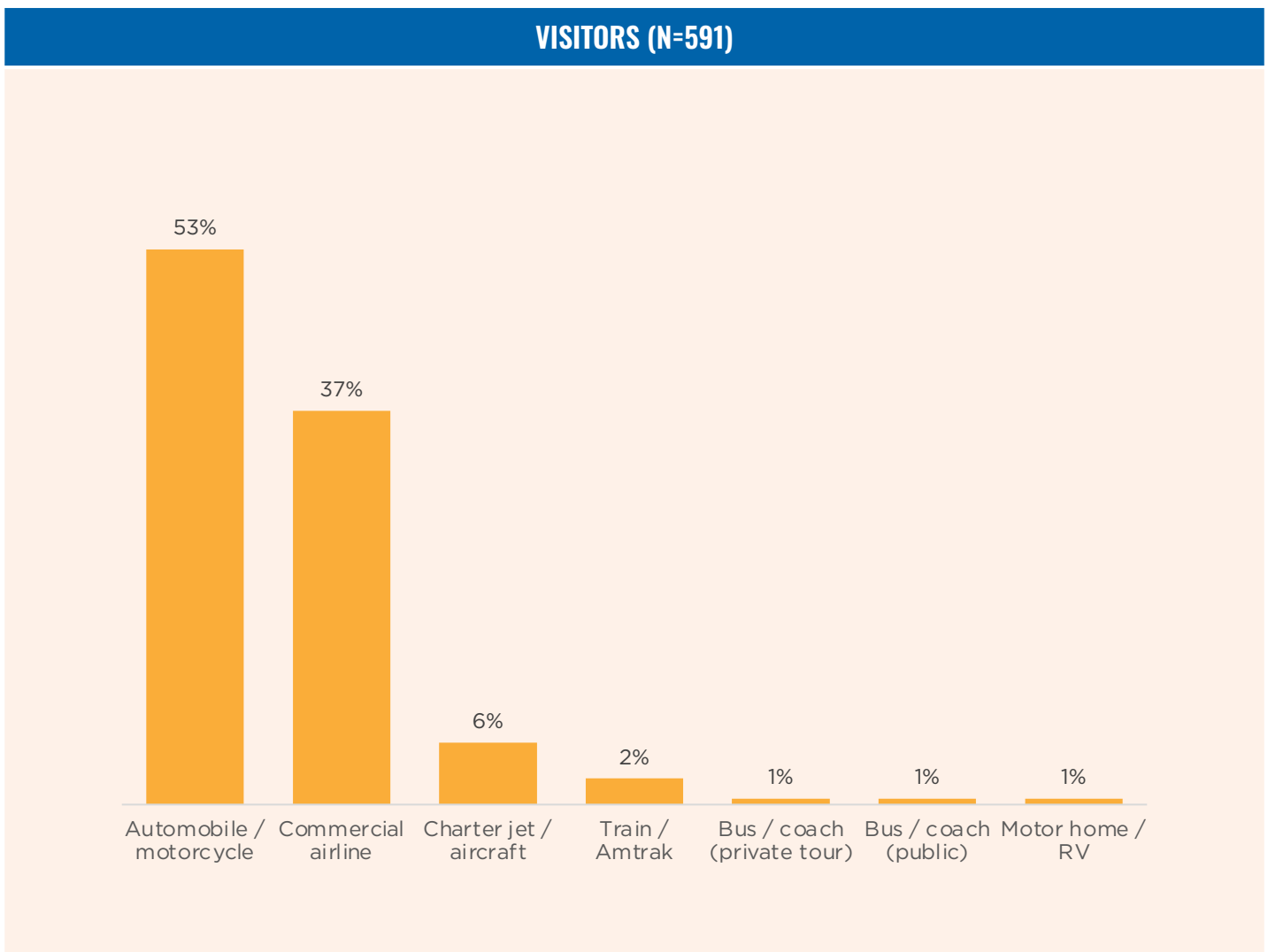
These findings suggest that Palm Beach County functions as a mature tourism market—one that is well-positioned to retain visitors for extended periods through its depth of experiences, quality accommodations, and diverse leisure offerings. This aligns with broader travel trends emerging post-pandemic, where remote work, flexible schedules, and a growing interest in "slow travel" have led more travelers to seek longer, experience-rich stays in desirable lifestyle destinations like Palm Beach County.



Q50. HOW DID YOU GET TO PALM BEACH COUNTY?

Two primary modes of transportation were identified among surveyed visitors to Palm Beach County. Slightly over half of respondents reported traveling to the area by automobile or motorcycle, which aligns with earlier findings showing a large share of visitors originating from within the state of Florida. While this drive-in accessibility supports visitation resilience, it also contributes to local traffic congestion—an issue that has been raised repeatedly in stakeholder discussions and prior research.

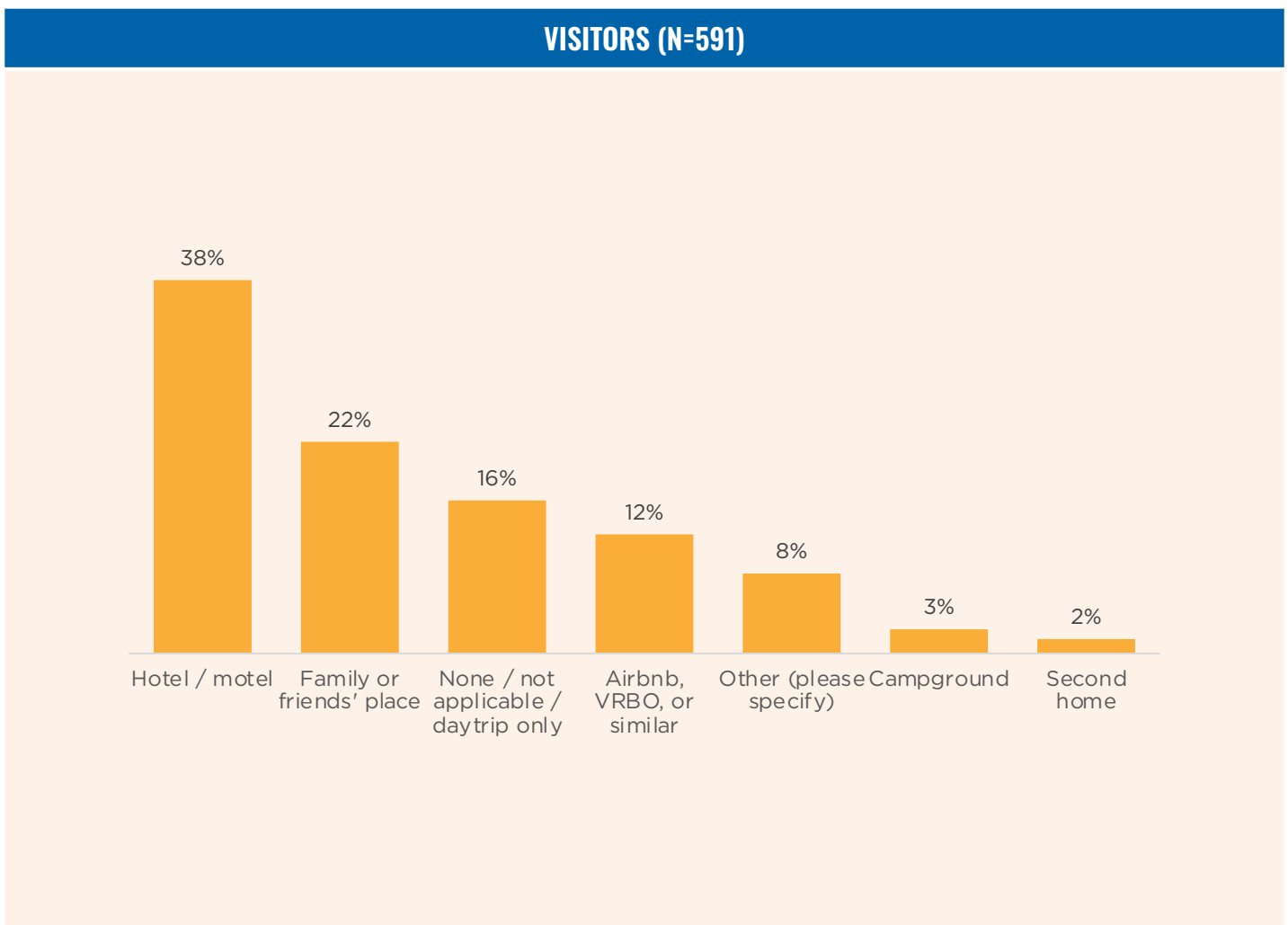
Another 37 percent of visitors indicated they traveled via commercial airline. The County’s expansion of terminal-B and various modernization efforts at Palm Beach International Airport (PBI) is a timely and forward-looking investment that supports this major travel segment. Enhancements to capacity, infrastructure, and traveler experience will help accommodate growing demand and position the region for sustainable tourism growth. Alternate modes of transportation—including private jets, trains, buses, and motorhomes—collectively accounted for just over 10 percent of total responses.



Q51. WHAT KIND OF ACCOMMODATION DID YOU USE DURING YOUR VISIT TO PALM BEACH COUNTY? (PLEASE SELECT ALL THAT APPLY)

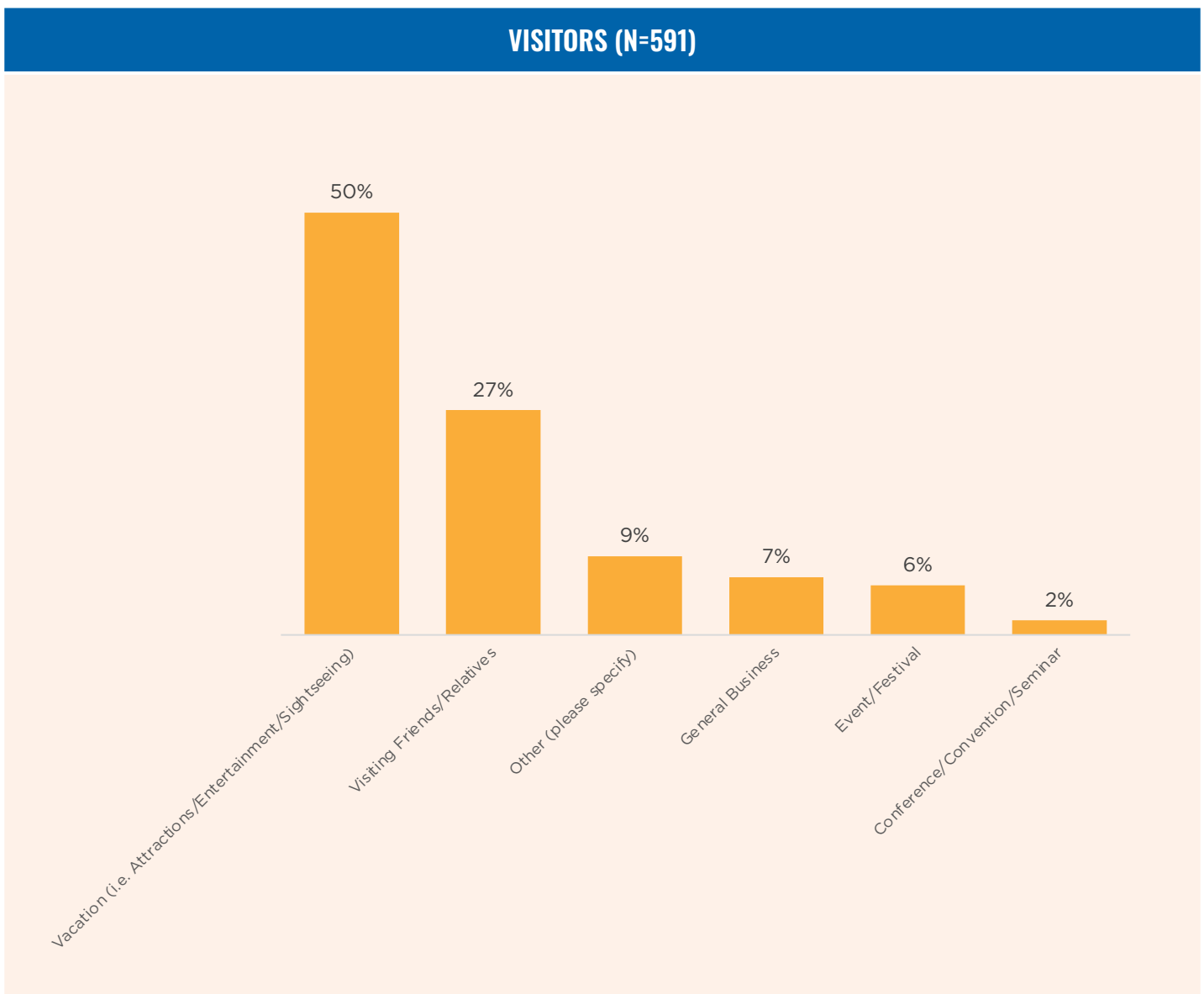
Visitors to Palm Beach County reported using a variety of accommodations during their stay. Hotels and motels were the most common lodging type, used by 38 percent of respondents. Lodging arrangements that do not generate room night tax revenue for the County—such as staying with family or friends (22 percent) or making a day trip without overnight lodging (16 percent)—accounted for a combined 38 percent of responses. Short-term rentals like Airbnb or VRBO were used by 12 percent of visitors, while smaller segments reported staying at campgrounds (three percent) or in second homes (two percent). Among those who selected “Other” (eight percent), the majority indicated they stayed in timeshare properties.

While Palm Beach County’s accommodation offerings serve a broad visitor base, traditional hotels remain the most commonly used lodging type. However, a substantial portion of visitors utilize non-revenue-generating accommodations, underscoring the importance of strengthening overnight visitation strategies that contribute directly to local tax revenue and economic impact.



Q52. WHAT WAS THE MAIN PURPOSE OF YOUR VISIT TO PALM BEACH COUNTY?

Exactly half of surveyed visitors indicated that their trip to Palm Beach County was for vacation—focused on attractions, entertainment, sightseeing, and general leisure. Another significant cohort (27 percent) reported that their primary purpose was to visit friends and/or family residing in the County. Within the open-ended “Other” category, specific motivations such as attending Major League Baseball Spring Training and playing golf at the County’s premier courses were also mentioned. This balance between leisure-driven and relationship-driven visitation suggests that Palm Beach County benefits from both its appeal as a traditional vacation destination and its strong ties to a residential base that helps generate repeat and referral visitation.



Q54. WHAT CAN PALM BEACH COUNTY DO TO EXTEND YOUR STAY BY A DAY OR MORE? (OPEN-ENDED)

PBC visitors were asked, in an open-ended format, what the County could do to encourage them to extend their visit by one or more days. Their responses are summarized in the word cloud and bullet points below.



Q54. WHAT CAN PALM BEACH COUNTY DO TO EXTEND YOUR STAY BY A DAY OR MORE? (OPEN-ENDED) CONTINUED...

1. AFFORDABILITY

- Many respondents cited lower hotel prices, special deals, or financial incentives.
- Phrases like “affordable accommodations,” “staycation specials,” and “free night stay” appeared frequently.

2. ENTERTAINMENT & ATTRACTIONS

- A common desire was more things to do, such as:
 - “More entertainment options”
 - “Evening events” and “Nightlife”
 - “Improved attractions like theme parks”
 - “Home or walking tours”

3. TRANSPORTATION & ACCESSIBILITY

- Several mentioned improving transportation:
 - “Better train connectivity”
 - “Shuttles”
 - “Less traffic”

4. PACKAGES & PROMOTIONS

- Some suggested bundling:
 - “2-for-1 coupons”
 - “Hotel plus car rental packages”
 - “Attraction discounts”

5. EVENTS & PROGRAMMING

- Visitors showed interest in:
 - “Senior-friendly events”
 - “Cultural or community events”

6. LODGING VARIETY

- A few requested alternative accommodations:
 - “More Airbnb or B&B listings”
 - “Pet-friendly options”

Q55. WHAT ARE THE FIRST THREE WORDS OR PHRASES THAT COME TO MIND WHEN YOU THINK OF PALM BEACH COUNTY?

1. NATURAL BEAUTY & SCENERY

- Dominated by words like beautiful, beach, ocean, sunshine, palm trees, clean, and pretty.
- These reflect a strong emotional connection to the area's natural appeal and visual identity.

2. RELAXATION & LEISURE

- Words like relaxing, peaceful, fun, and warm show Palm Beach County is perceived as a place to unwind and enjoy leisurely experiences.

3. LUXURY & AFFLUENCE

- Expensive appears frequently, indicating a perception of exclusivity or high cost.

4. RECREATION & TOURISM ACTIVITIES

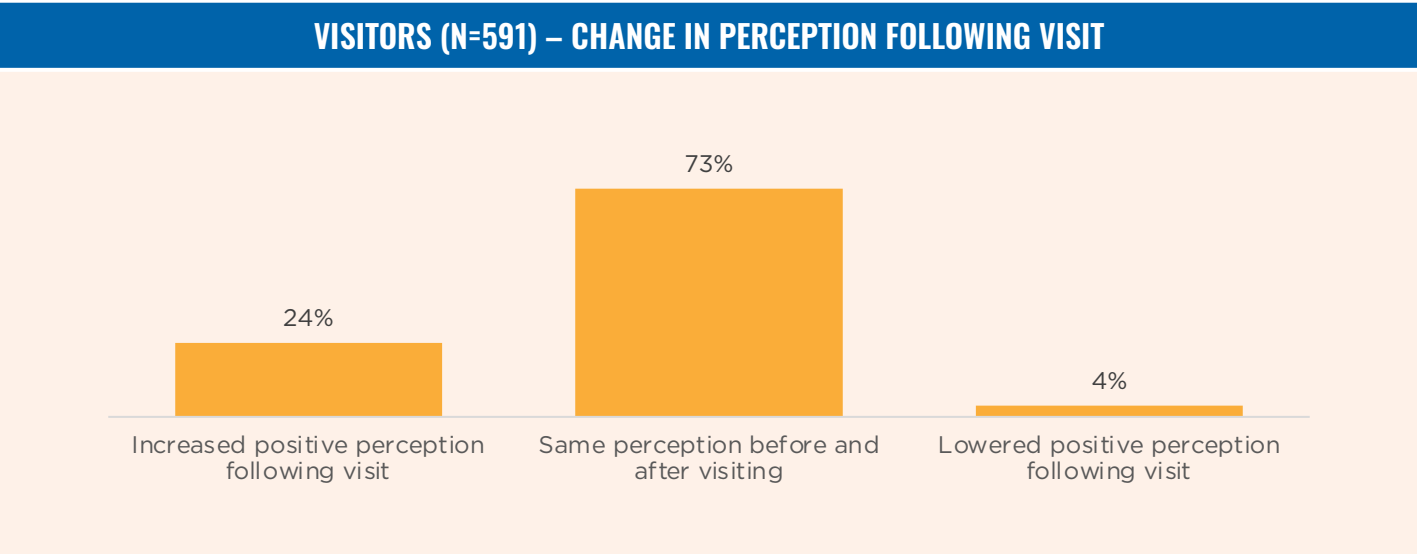
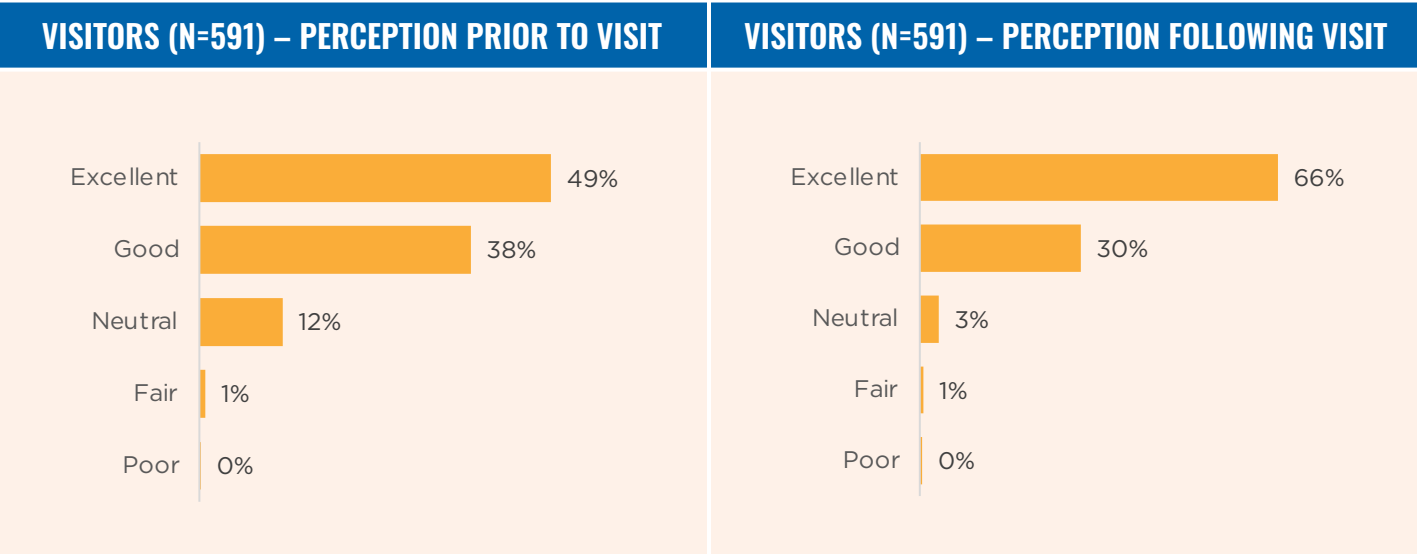
- Visitors associate the county with golf, shopping, and food—suggesting strong brand alignment with recreational and lifestyle tourism.

5. HOSPITALITY & COMMUNITY

- Words like friendly, family, and fun point to welcoming, family-friendly experiences and interactions with locals or staff.

Q56. WHAT WAS YOUR OVERALL PERCEPTION OF PALM BEACH COUNTY AS A PLACE TO VISIT, BOTH PRIOR TO VISITING AND FOLLOWING YOUR VISIT?

PBC visitors were asked to rate their perception of the destination’s overall quality on a scale of 1 (Poor) to 5 (Excellent), both before and after their visit. As shown in the chart below, responses were overwhelmingly positive in both cases. Prior to visiting, 99 percent of respondents held at least a neutral perception of the County—a figure that remained consistent after their trip. Notably, the percentage of visitors who rated the destination as “Excellent” increased from 49 percent before their visit to 66 percent afterward. Overall, one in four respondents improved their rating following their visit, while 73 percent reported no change in perception. Only four percent indicated a decline in their opinion of Palm Beach County after spending time in the market. These results suggest a high level of visitor satisfaction and reinforce the County’s potential to benefit from positive word-of-mouth promotion and repeat visitation.



Q57. HOW DO YOU THINK WE COULD IMPROVE THE QUALITY OF PALM BEACH COUNTY AS A PLACE TO VISIT?

PBC visitors were asked, in an open-ended format, to describe improvements that would enhance the quality of their visit to the destination. Their responses are summarized in the word cloud and bullet points below.



Q57. HOW DO YOU THINK WE COULD IMPROVE THE QUALITY OF PALM BEACH COUNTY AS A PLACE TO VISIT?

TRANSPORTATION & TRAFFIC ARE CRITICAL PAIN POINTS

- “Traffic” was the most frequently mentioned term, cited in various contexts including congestion, road conditions, and overall mobility.
- Visitors also called for improved parking availability and transit options, suggesting a desire for expanded offerings like trolleys, shuttles, or FreeBee-style microtransit.
- **Implication:** Improved visitor transportation access—especially to beaches, downtowns, and cultural venues—should be a central focus of destination infrastructure planning.

DESIRE FOR MORE AFFORDABLE AND DIVERSE DINING

- Many respondents noted the need for better restaurants, with specific mention of affordability, culinary variety, and options appealing to younger travelers.
- This feedback was often paired with comments on “hipper” or trendier environments, suggesting visitors are looking for more modern, casual, and locally rooted experiences.
- **Implication:** Palm Beach County could benefit from culinary tourism development, including food halls, pop-ups, and support for small/local food entrepreneurs in high-foot-traffic areas.

CALL FOR EXPANDED ENTERTAINMENT AND CULTURAL EVENTS

- “Events” was another top theme, with visitors requesting more nightlife, festivals, and live entertainment, especially in walkable districts.

- Several responses specifically asked for youth-oriented programming or experiential attractions beyond the beach and retail.
- **Implication:** There is an opportunity to develop a stronger year-round calendar of events that cater to multiple demographics and encourage extended stays.

BEACH QUALITY AND ACCESS REMAIN TOP OF MIND

- While visitors praise Palm Beach County’s coastal appeal, several noted the need for cleaner beaches, more amenities, or greater public access.
- These comments often overlapped with mobility complaints, suggesting some beaches may be difficult to reach or overcrowded.
- **Implication:** Maintain beach quality and explore innovative ways to distribute visitation across coastal access points to reduce congestion and preserve appeal.

INTEREST IN INFRASTRUCTURE AND AESTHETIC ENHANCEMENTS

- Respondents mentioned improving the visual appeal of streetscapes, walkability, and the general upkeep of public spaces.
- There were also suggestions for updated lodging and more modern accommodations, especially in older coastal municipalities.
- **Implication:** Placemaking strategies should focus on enhancing the built environment around high-traffic areas, with investment in lighting, signage, shade, and cohesive district design.

Q58. WHAT COULD PALM BEACH COUNTY DO TO BRING YOU BACK MORE OFTEN?

Similar to a previous question about extending length of stay, PBC visitors were also asked what the County could do to encourage more frequent return visits. Their open-ended responses are summarized in the word cloud and bullet points below.



Q58. WHAT COULD PALM BEACH COUNTY DO TO BRING YOU BACK MORE OFTEN?

EVENTS DRIVE RETURN TRAVEL

- “Events” was the most frequently mentioned word, appearing in contexts such as seasonal attractions, music festivals, community markets, and sporting events.
- Respondents suggested they are more likely to return if Palm Beach County offers a regular calendar of compelling, themed experiences.
- **Implication:** Investment in signature and recurring events—especially during shoulder seasons—can increase visit frequency and enhance off-peak economic activity.

AFFORDABILITY IS A RECURRING BARRIER

- Many responses referenced high prices, with visitors specifically citing hotel rates, restaurants, and general affordability.
- Responses such as “lower hotel prices” and “make PBC more affordable” reflect a sensitivity to cost, especially among repeat or budget-conscious travelers.
- **Implication:** Marketing campaigns could emphasize value-oriented offerings, loyalty packages, or off-season deals to convert first-time visitors into repeat guests.

DESIRE FOR MORE PROACTIVE ENGAGEMENT AND PROMOTION

- Some respondents noted they would return more often if the destination stayed “top of mind.”
- Suggestions included email reminders, targeted ads, and curated seasonal itineraries to inspire return travel.

- **Implication:** There is an opportunity to build out a robust visitor re-engagement strategy, including post-trip messaging, seasonal promotions, and local ambassador campaigns.

CLEAN, WELCOMING BEACHES REMAIN A CORE DRAW

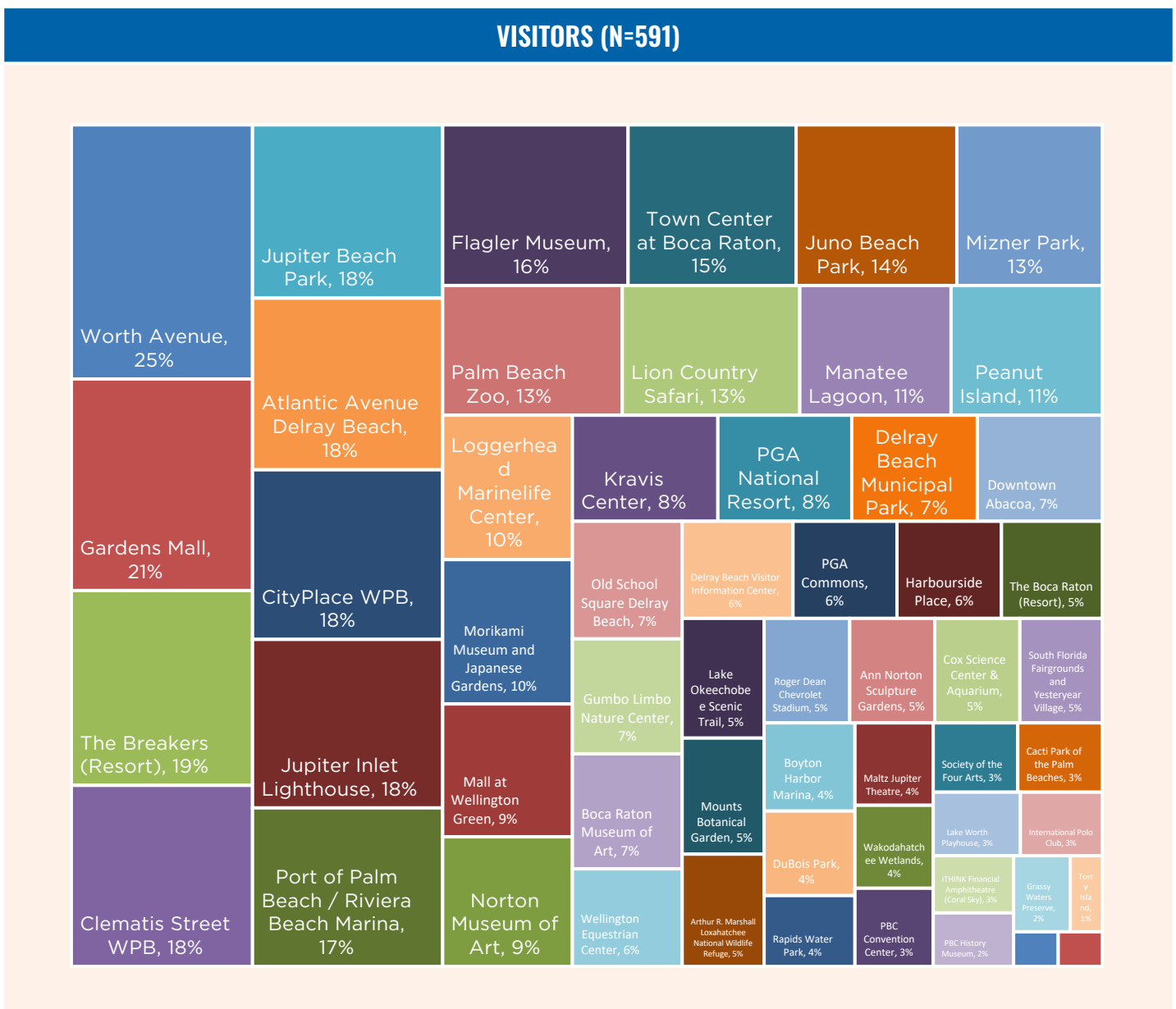
- Mentions of the “beach” appeared frequently, usually in tandem with calls for better access, more amenities, or enhanced environmental upkeep.
- **Implication:** Continued investment in beach maintenance, shade structures, restrooms, and accessibility can reinforce Palm Beach County’s primary competitive advantage.

EXPERIENCE DEPTH AND DIVERSITY MATTER

- Some visitors asked for more unique attractions, entertainment options, and family-oriented things to do.
- Several noted that once they “do the basics,” they need new reasons to return.
- **Implication:** Building out a layered tourism offering—including indoor attractions, art experiences, and day-trip options—can deepen engagement and extend the lifecycle of the typical visitor.

Q59. ON YOUR VISIT(S) TO PALM BEACH COUNTY, WHICH OF THESE SPECIFIC ATTRACTIONS DID YOU VISIT? (SELECT ALL THAT APPLY)

Palm Beach County visitors were asked to select the attractions and tourism assets they visited during their trip from a list of more than 50 of the area's top destinations. The resulting data, summarized in the hierarchy chart below, reflect the wide variety of experiences pursued by visitors. Leading attractions included upscale shopping and dining districts such as Worth Avenue (visited by 25 percent of respondents), The Gardens Mall (21 percent), Clematis Street (18 percent), and CityPlace (18 percent). Family-oriented wildlife experiences also ranked highly, with both the Palm Beach Zoo and Lion Country Safari garnering visitation from 13 percent of surveyed guests. Among beach destinations, Jupiter Beach (18 percent) and Juno Beach Park (14 percent) were the most frequently visited by respondents. Overall, the findings illustrate the County's strong appeal across lifestyle, family, and outdoor categories.



Q60. WHAT ASPECTS OF YOUR VISIT TO THESE SPECIFIC ATTRACTIONS DID YOU FIND EXCELLENT, OUTSTANDING OR LIKE THE MOST? (OPEN-ENDED)

In addition to identifying which attractions they pursued during their time in PBC, visitors were also asked to identify which aspects of their visit to these specific attraction(s) they found excellent, outstanding, or enjoy the most. Their open ended responses are summarized in the word cloud and bulleted list below.



Q60. WHAT ASPECTS OF YOUR VISIT TO THESE SPECIFIC ATTRACTIONS DID YOU FIND EXCELLENT, OUTSTANDING OR LIKE THE MOST? (OPEN-ENDED)

BEACHES CONTINUE TO DEFINE THE VISITOR EXPERIENCE

- “Beach” and “beaches” were the most frequently mentioned aspects across all responses, indicating that the coastal environment remains the cornerstone of visitor satisfaction.
- Respondents praised beach beauty, cleanliness, and atmosphere, with some referencing specific beaches (e.g., Juno Beach, Jupiter Beach) or general beachfront ambiance and walkability.
- **Implication:** Maintaining and enhancing beach access, facilities, and cleanliness is critical for sustaining visitor satisfaction. Enhancements to beachside retail, dining, and parking should be prioritized.

CULTURAL AND HISTORIC ATTRACTIONS STAND OUT

- “Museum” and references to specific sites like the Flagler Museum, Society of the Four Arts, and Morikami Museum were praised for their uniqueness, beauty, and educational value.
- Visitors described these venues as elegant, memorable, and well-curated, showing appreciation for the county’s arts and heritage assets.
- **Implication:** Cultural institutions are strong complements to the leisure experience and appeal especially to high-value visitors. Investment in programming and visibility for these attractions could further elevate Palm Beach County’s identity as a refined, arts-rich destination.

POSITIVE EMOTIONAL CONNECTIONS AND RETURN INTENTIONS

- Words like “love,” “enjoyed,” and “beautiful” appeared frequently, showing a high level of emotional satisfaction with the experience.
- Several responses reflected a personal connection to the destination, with comments about memorable moments, special ambiance, or family traditions.
- **Implication:** Marketing should continue to tap into emotional storytelling and legacy branding—highlighting how Palm Beach County is a place for both first-time magic and multi-generational tradition.

SHOPPING AND WALKABLE DISTRICTS ARE APPRECIATED

- “Shopping” and references to districts like Atlantic Avenue, Clematis Street, Worth Avenue, and CityPlace were frequently mentioned as standout aspects.
- Visitors liked the mix of ambiance, retail variety, and food options, especially in scenic or historic settings.
- **Implication:** These lifestyle districts offer compelling experiences and deserve continued investment in placemaking, beautification, and seasonal programming to maximize visitor traffic and spending.

Q61. WHAT ASPECTS OF YOUR VISIT TO THESE SPECIFIC ATTRACTIONS DID YOU FIND NEGATIVE, DISAPPOINTING, OR LIKE THE LEAST? (OPEN-ENDED)

Visitors were also asked to reflect on the less positive aspects of their experience, including anything they found disappointing, frustrating, or enjoyed the least. Insights from their open-ended responses are summarized in the word cloud and bulleted list below.



Q61. WHAT ASPECTS OF YOUR VISIT TO THESE SPECIFIC ATTRACTIONS DID YOU FIND NEGATIVE, DISAPPOINTING, OR LIKE THE LEAST? (OPEN-ENDED)

PARKING ACCESS IS THE TOP SOURCE OF FRUSTRATION

- “Parking” was the most frequently cited negative aspect, appearing in a variety of contexts: limited availability, cost, lack of clear signage, or distance from attractions.
- Respondents often mentioned that parking challenges reduced enjoyment and convenience, particularly in popular coastal or downtown areas.
- **Implication:** Improving parking infrastructure and wayfinding, expanding availability in peak zones, and better integrating it with walking and transit routes will significantly enhance the visitor experience.

TRAFFIC AND CONGESTION REMAIN A MAJOR COMPLAINT

- “Traffic” was the second most frequently mentioned term, with visitors expressing frustration about getting to and from attractions, especially during peak hours or near beaches and downtowns.
- Several comments suggested mobility improvements could meaningfully increase the appeal and accessibility of top sites.
- **Implication:** Addressing traffic bottlenecks and improving last-mile access through trolleys, shuttles, or microtransit (e.g., FreeBee) would support ease of movement and reduce frustration.

ISSUES RELATED TO CAPACITY AND ACCESS AT THE BEACHES

- While beaches were frequently praised in earlier questions, here they were also the subject of complaints—mostly tied to overcrowding, lack of amenities, or perceived exclusivity (particularly in Palm Beach areas).
- Comments referencing “Palm Beach” often suggested a sense of inaccessibility or elitism in the visitor experience.
- **Implication:** There is a need to balance the brand prestige of Palm Beach with efforts to ensure public spaces feel welcoming, inclusive, and well-supported with amenities (e.g., restrooms, concessions, shade).

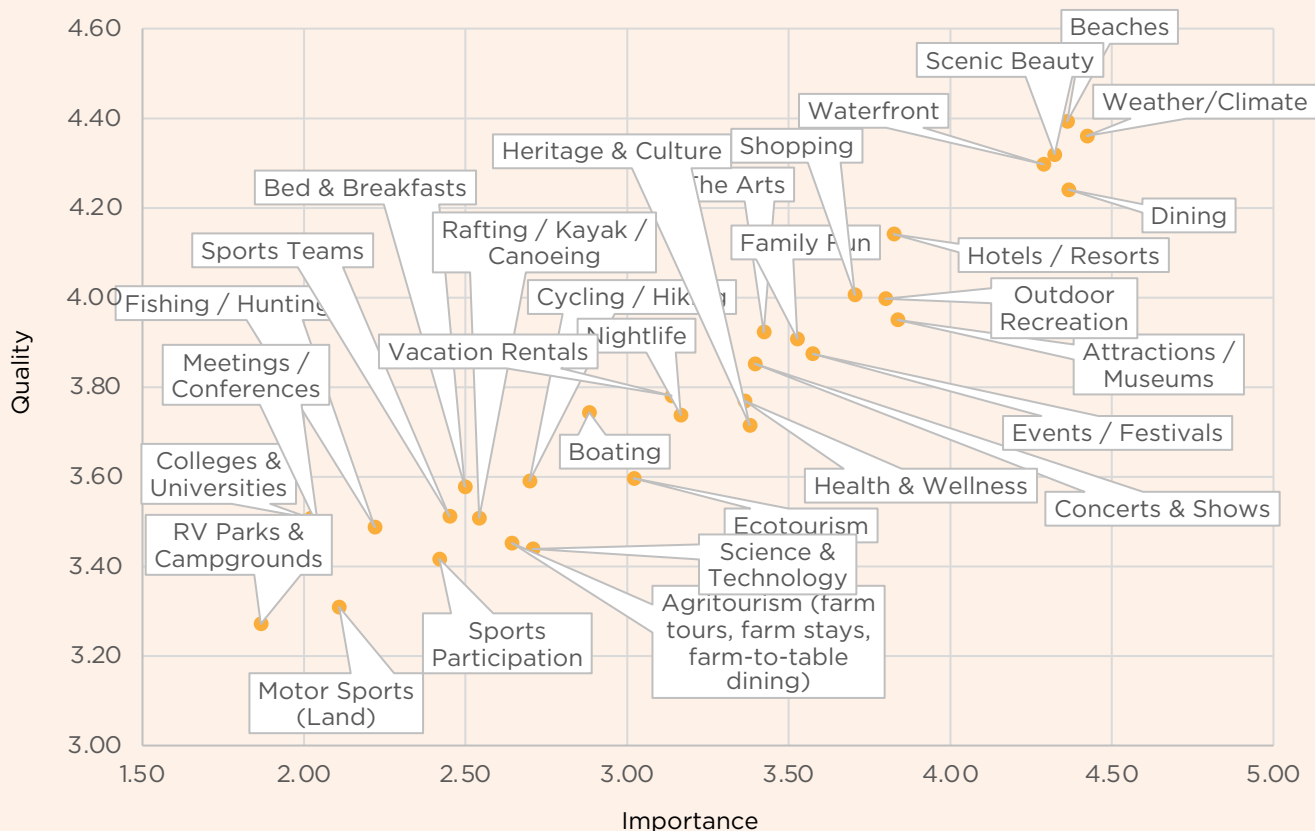
ATTRACTION ENVIRONMENT AND ATMOSPHERE

- A smaller set of respondents mentioned low energy or lack of activity at certain attractions, with comments like “minimal attendance” and “nothing going on.”
- Other feedback included outdated facilities or limited hours of operation, particularly at smaller museums or parks.
- **Implication:** Attractions can benefit from added animation, seasonal programming, or collaborative events to improve vibrancy and perception of value.

Q62 & 63. WHICH ASPECTS OF THE 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 visitors were asked to rate both the importance and quality of key destination features on a scale from 1 (lowest) to 5 (highest). The scatterplot below presents these results, with each dot representing a specific asset's average score for both measures. In general, responses followed a linear trend—features rated as more important also tended to receive higher quality scores. Beaches, weather/climate, scenic beauty, dining, and the waterfront earned the highest combined ratings for both importance and quality. In contrast, aspects such as RV parks and campgrounds, dry-land motor sports, colleges and universities, meetings and conferences, and fishing/hunting received lower average importance and quality scores among surveyed visitors. The lack of major gaps between importance and quality suggests that Palm Beach County is effectively delivering on the experiences that matter most to its visitors—an encouraging sign of destination maturity. At the same time, select lower-importance categories such as ecotourism, agritourism, and science/technology may offer longer-term growth potential, particularly if aligned with emerging traveler interests and sustainability trends.

VISITORS (N=591) – IMPORTANCE VS QUALITY RATING OF PALM BEACH COUNTY EXPERIENCES/ASPECTS



Q62 & 63. WHICH ASPECTS OF THE 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? CONTINUED...

It is also important to understand the differences in perceived importance between residents and visitors. The table below presents the difference in average importance ratings for each destination attribute, sorted from the largest positive gap (more important to residents) to the largest negative gap (more important to visitors). In this analysis, colleges and universities, health and wellness, youth sports, and science and technology emerged as attributes more important to residents—those achieving the largest positive gap in score between residents and visitors. Conversely, vacation rentals, hotels and resorts, the waterfront, dining, and beaches received the greatest negative differentials, highlighting them as attributes more important to visitors than residents. This pattern reflects expected priorities—residents tend to value community assets and quality-of-life factors that shape their daily environment, while visitors naturally prioritize experience-driven amenities such as lodging, beaches, and dining that define the character of a short-term leisure trip.

VISITORS (N=591) – DIFFERENCES IN IMPORTANCE RATINGS BETWEEN RESIDENTS AND VISITORS

	Resident	Visitor	Residents vs Visitors
Colleges & Universities	3.12	2.02	1.10
Health & Wellness	4.13	3.36	0.76
Sports Participation	3.02	2.42	0.60
Science & Technology	3.30	2.71	0.59
Agritourism (farm tours, farm stays, farm-to-table dining)	3.18	2.64	0.54
Concerts & Shows	3.92	3.39	0.53
Cycling / Hiking	3.22	2.70	0.52
The Arts	3.90	3.42	0.48
Meetings / Conferences	2.49	2.04	0.45
Rafting / Kayak / Canoeing	2.97	2.54	0.43
Ecotourism	3.40	3.02	0.38
RV Parks & Campgrounds	2.23	1.87	0.36
Events / Festivals	3.93	3.57	0.35
Sports Teams	2.80	2.45	0.35
Outdoor Recreation	4.07	3.80	0.27
Fishing / Hunting	2.46	2.22	0.24
Heritage & Culture	3.62	3.38	0.24
Family Fun	3.74	3.53	0.21
Boating	3.08	2.88	0.19
Attractions / Museums	3.96	3.84	0.12
Nightlife	3.28	3.17	0.11
Weather/Climate	4.50	4.42	0.08
Motor Sports (Land)	2.17	2.11	0.06
Shopping	3.75	3.70	0.04
Scenic Beauty	4.35	4.32	0.02
Bed & Breakfasts	2.49	2.50	-0.01
Beaches	4.28	4.36	-0.08
Dining	4.16	4.37	-0.21
Waterfront	4.08	4.29	-0.21
Hotels / Resorts	3.29	3.82	-0.54
Vacation Rentals	2.55	3.14	-0.59

Q62 & 63. WHICH ASPECTS OF THE 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? CONTINUED...

The table below summarizes the average quality ratings by group and highlights the difference between residents and visitors, sorted from the largest positive to the largest negative gaps. A positive gap indicates higher quality perception among residents, while a negative gap suggests higher quality perception among visitors. Boating, rafting/kayaking, fishing, sports participation, and colleges and universities were the only categories in which residents rated quality slightly higher than visitors. These assets may be more integrated into residents' daily routines or experienced more frequently, potentially allowing for deeper appreciation. In contrast, the largest negative gaps appear in lodging and tourism-driven amenities such as vacation rentals, hotels/resorts, nightlife, bed and breakfasts, and dining—categories where visitors consistently reported stronger quality perceptions than residents.

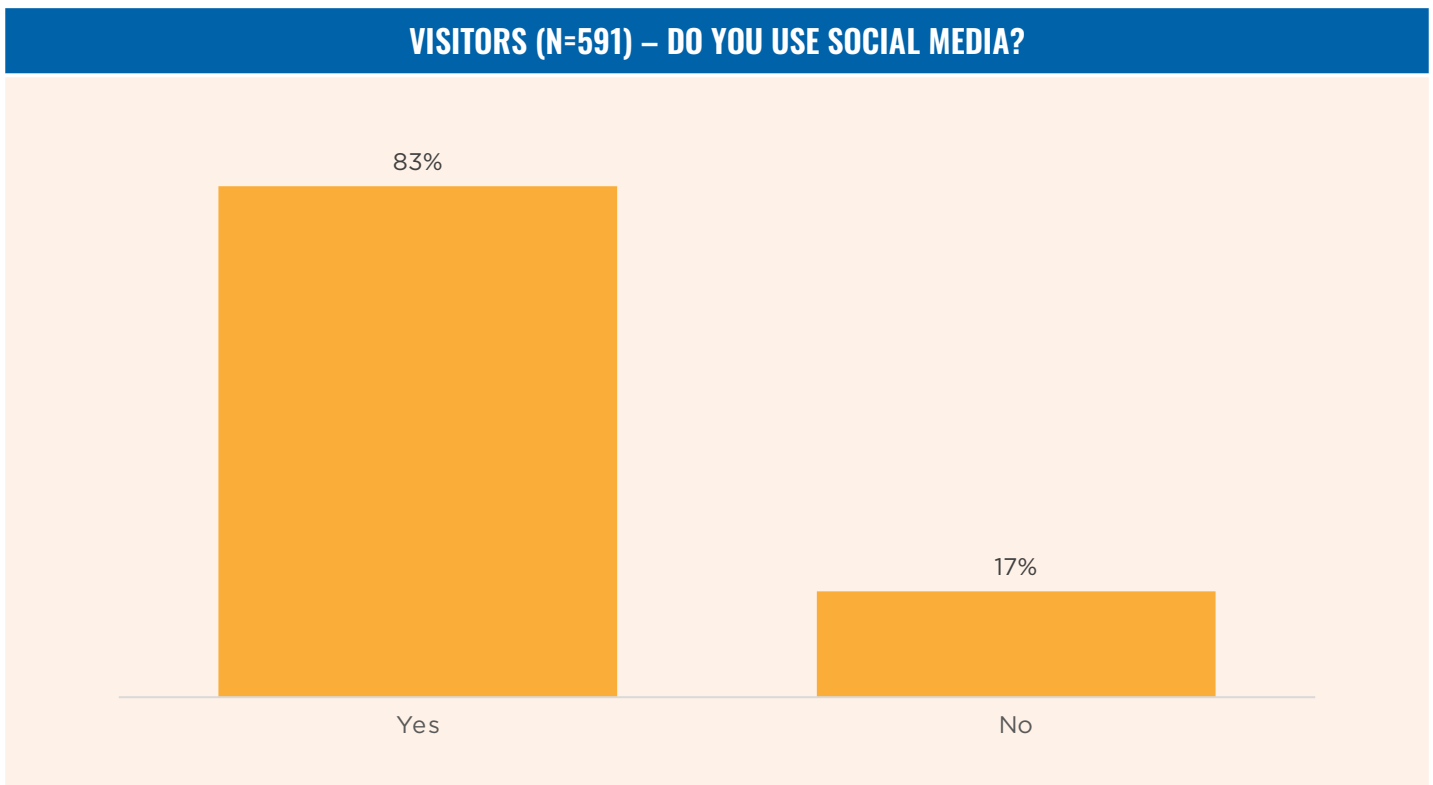
Overall, visitors assigned higher quality ratings than residents across most categories, with only six destination attributes receiving higher marks from locals. This dynamic likely reflects differing expectations and usage patterns: visitors often engage with these amenities during curated or peak experiences, framed by the novelty and excitement of travel, while residents may evaluate them through a more comparative or cumulative lens shaped by frequent exposure. These quality gaps ultimately reinforce Palm Beach County's strength as a visitor-serving destination, particularly in areas central to the tourist experience.

VISITORS (N=591) – DIFFERENCES IN QUALITY RATINGS BETWEEN RESIDENTS AND VISITORS

	Resident	Visitor	Residents vs Visitors
Boating	3.90	3.74	0.16
Rafting / Kayak / Canoeing	3.62	3.51	0.11
Fishing / Hunting	3.58	3.49	0.09
Sports Participation	3.51	3.42	0.09
Colleges & Universities	3.58	3.51	0.08
Health & Wellness	3.80	3.77	0.04
Meetings / Conferences	3.48	3.49	0.00
Concerts & Shows	3.84	3.85	-0.02
Science & Technology	3.42	3.44	-0.02
Events / Festivals	3.82	3.87	-0.05
Attractions / Museums	3.90	3.95	-0.05
Weather/Climate	4.29	4.36	-0.07
The Arts	3.85	3.92	-0.07
RV Parks & Campgrounds	3.19	3.27	-0.08
Outdoor Recreation	3.91	4.00	-0.08
Sports Teams	3.43	3.51	-0.09
Scenic Beauty	4.23	4.32	-0.09
Cycling / Hiking	3.50	3.59	-0.09
Family Fun	3.78	3.91	-0.13
Ecotourism	3.45	3.60	-0.15
Shopping	3.84	4.01	-0.16
Agritourism (farm tours, farm stays, farm-to-table dining)	3.28	3.45	-0.17
Heritage & Culture	3.53	3.71	-0.19
Beaches	4.20	4.39	-0.20
Motor Sports (Land)	3.11	3.31	-0.20
Waterfront	4.10	4.30	-0.20
Dining	3.99	4.24	-0.25
Bed & Breakfasts	3.30	3.58	-0.28
Hotels / Resorts	3.86	4.14	-0.28
Nightlife	3.42	3.74	-0.32
Vacation Rentals	3.45	3.78	-0.33

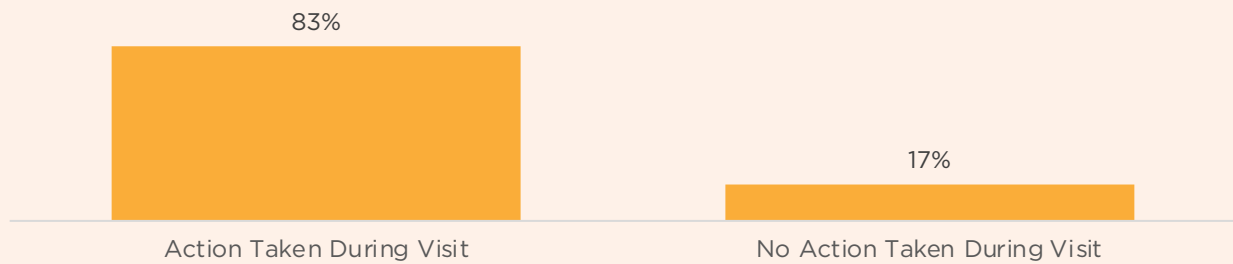
Q64 & 65. DO YOU USE SOCIAL MEDIA, AND IF SO, WHICH OF THE FOLLOWING ACTIONS HAVE YOU PREVIOUSLY TAKEN ON SOCIAL MEDIA IN CONJUNCTION WITH YOUR VISIT TO PALM BEACH COUNTY?

Palm Beach County visitors were asked about their social media usage, particularly as it related to their visit to the destination. Among the 83 percent of visitors who reported using social media, approximately 83 percent engaged in at least one social media activity connected to their trip. The most common actions included following a Palm Beach County destination account (37 percent), clicking on a PBC travel advertisement (36 percent), viewing a video or photo that inspired their visit (33 percent), and sharing a travel story, photo, or video about their experience. These findings highlight the strong role social media plays in shaping trip inspiration, engagement, and post-visit sharing among today's travelers—reinforcing the importance of a targeted, high-quality digital presence.

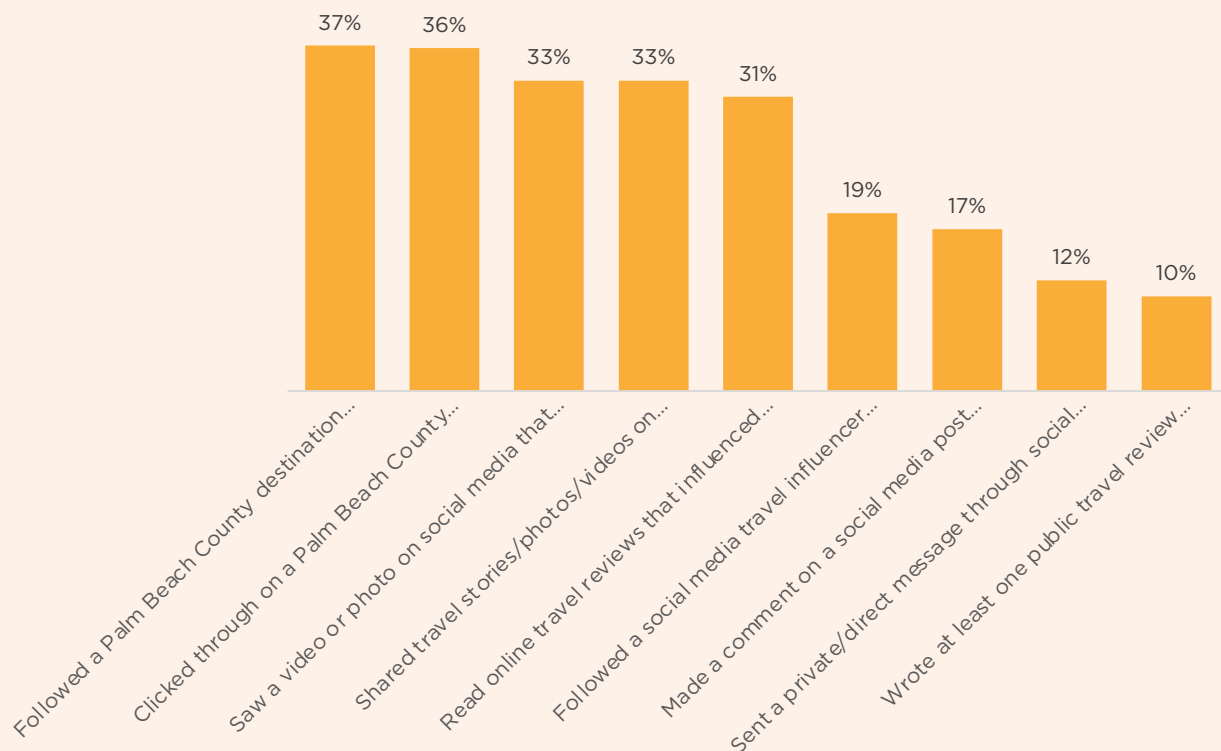


Q64 & 65. DO YOU USE SOCIAL MEDIA, AND IF SO, WHICH OF THE FOLLOWING ACTIONS HAVE YOU PREVIOUSLY TAKEN ON SOCIAL MEDIA IN CONJUNCTION WITH YOUR VISIT TO PALM BEACH COUNTY? CONTINUED...

VISITOR ACTION TAKEN ON SOCIAL MEDIA DURING VISIT(S)



VISITORS (N=591) – WHICH ACTIONS DID YOU TAKE ON YOUR PREVIOUS VISIT(S)



Q66. GENERAL COMMENTS

Visitors provided general, opened ended comments at the conclusion of the PBC visitor survey. Their feedback has been summarized in the text below.

KEY POSITIVE THEMES

- **General Appreciation for the Destination:** Many visitors described Palm Beach County as “beautiful,” “elegant,” or “fabulous.” It is clear that the destination evokes strong positive emotional responses.
- **Repeat Visitation and Loyalty:** Several comments suggest a pattern of return visitation or long-term affinity, such as: “Love it here, come back every year” and “It is my preferred destination for vacation for over 20 years.”
- **Convenient Transportation:** Some visitors highlighted the train system positively (e.g., “The train is convenient”), which may support continued investment in regional mobility infrastructure.

KEY CONCERNS OR SUGGESTIONS

- **Traffic Congestion:** A few respondents expressed frustration with traffic, suggesting infrastructure or traffic management remains a concern.
- **Affordability and Local Economics:** One respondent mentioned they moved away because of rising costs and changes in the character of the area, suggesting Palm Beach risks pricing out some of its former residents or visitors.



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FROM ALL OF US AT CSL THANK YOU

MAY 2025

FRISCO OFFICE

One Cowboys Way
Suite 325
Frisco, TX 75034
cslintl.com | 602.294.2000

MINNEAPOLIS OFFICE

520 Nicollet Mall
Suite 520
Minneapolis, MN 55402
cslintl.com | 602.294.2000

NEW YORK OFFICE

61 Broadway
Suite 2400
New York, NY 10006
cslintl.com | 602.294.2000