

THE PULSE:

PALM BEACH COUNTY ONLINE CONSUMER BEHAVIOR



**END OF SEASON '24 RECAP:
NOVEMBER - APRIL**

ABOUT THIS STUDY

PURPOSE: The purpose of this study is to assess how — and, where applicable, why — Palm Beach County consumers interact with notable Brands, organizations and institutions online.

TIME PERIOD: The time period studied is November 1st, 2023 to April 30th, 2024, coinciding with the County's "peak season."

GEOGRAPHY: Geographic data is informed by both Palm Beach County ZIP codes, as well as the West Palm Beach-Ft. Pierce DMA (Designated Metropolitan Area).

DATA/MEASUREMENT: Data is measured on the basis of both absolute figures and standard deviations, depending on the information expressed. All direct comparisons are measured using the same method for all Brands.

SOURCES: Data is sourced from a combination of publicly available (eg. Google Trends) and subscription-based tools.



**THE LEADERBOARD:
TOP WEBSITES AND
SOCIAL ACCOUNTS**

| <u>WEBSITE</u> | <u>MONTHLY VISITS - APR</u> | <u>MONTHLY VISITS - NOV</u> | <u>CHANGE</u> | <u>NOTES</u> |
|---|-----------------------------|-----------------------------|---------------|--|
| THE PALM BEACH POST | 2.5MM | 2.3MM | 9% | Meaningful increases in mobile traffic and organic social traffic—perhaps one in the same user. |
| WPTV | 1.8MM | 2.1MM | -17% | Decreasing organic search traffic (SEO) not offset by gains from Google News and Reddit. |
| PALM BEACH DAILY NEWS (“THE SHINY SHEET”) | 195K | 175K | 10% | Google News and Yahoo News drove gains. Almost 50% mobile audience spending nearly 7 minutes on the site. |
| CBS 12 | 1.1MM | 891K | 23% | Direct, branded traffic grew significantly during 6 mos. The #1 destination people leave to? NBCMontana.com |

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|----------------------------------|---------------------------------|---------------------------------|---------------|--|
| KRAVIS CENTER | 150K | 96K | 56% | Significant increase in branded, direct traffic. A sign of a loyal and growing audience. |
| THE NORTON | 31K | 16K | 94% | Traffic grew due to organic searches on mobile devices — typically indicating discovery by younger audiences. |
| DISCOVER THE PALM BEACHES | 494K | 327K | 51% | Major increase in mobile direct traffic in January; possibly indicative of a digital ad campaign. Organic search increased slightly. |

NOTE: While part of our November study, The Royal and CityPlace (fka The Square) did not have sufficient data to analyze and update for April.

The Social Landscape

Notable Instagram Accounts

| <u>ACCOUNT</u> | <u>GROWTH</u> | <u>ENG. RATE</u> | <u>TOP POST</u> | <u>NOTES</u> |
|------------------|---------------|------------------|---|--|
| FloridaofTMW | 152% | 5.6% | https://www.instagram.com/p/CzkOPVQrIYo/ | Sexy buildings. Gambling news. Unique events. The account has it all. |
| Nora West Palm | 49% | 6.1% | https://www.instagram.com/reel/C17C_0XA-xb/ | Full of national names, the most “local” post of them all led the account. |
| The Gardens Mall | 6% | 0.5% | https://www.instagram.com/reel/CzoiyVigBPP/ | Santa Claus and the holidays dominated the mix. |
| CityPlace | 14% | 0.6% | https://www.instagram.com/reel/CzgsGFWA1rE/ | The Holidays and contests truly move the needle. |
| Mizner Park | Not Available | 0.2% | https://www.instagram.com/p/C0E5z7DOr4s/ | The Real Housewives topped the engagement leaderboard. |

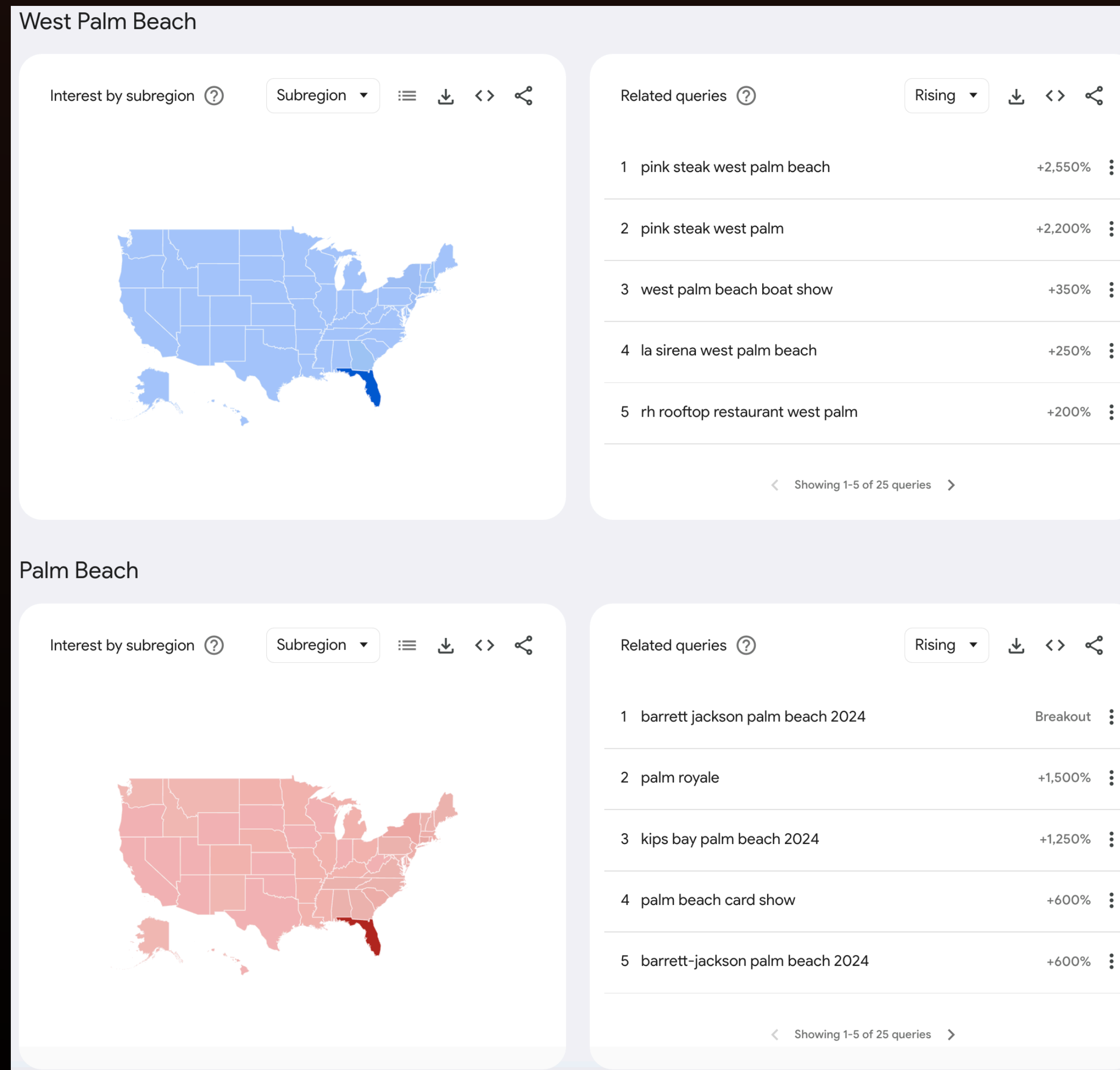


**SEARCH BEHAVIOR &
INTEREST:
A SEASONAL SNAPSHOT**

DIFFERENT STROKES...

✓ The difference in consumer demographics and interests is as pronounced via Search as it is in-person. Whereas the WPB audience is heavily focused on venues, Palm Beach is zeroed in on exclusive events, social gatherings, and even some local intrigue. (But of course).

If trends hold, 2024's Kings of Season (at least online) the Boat Show, Kravis Center and Barrett-Jackson present strong integration opportunities for consumer Brands next season.





**OUR "INSTITUTIONS,"
ONLINE**

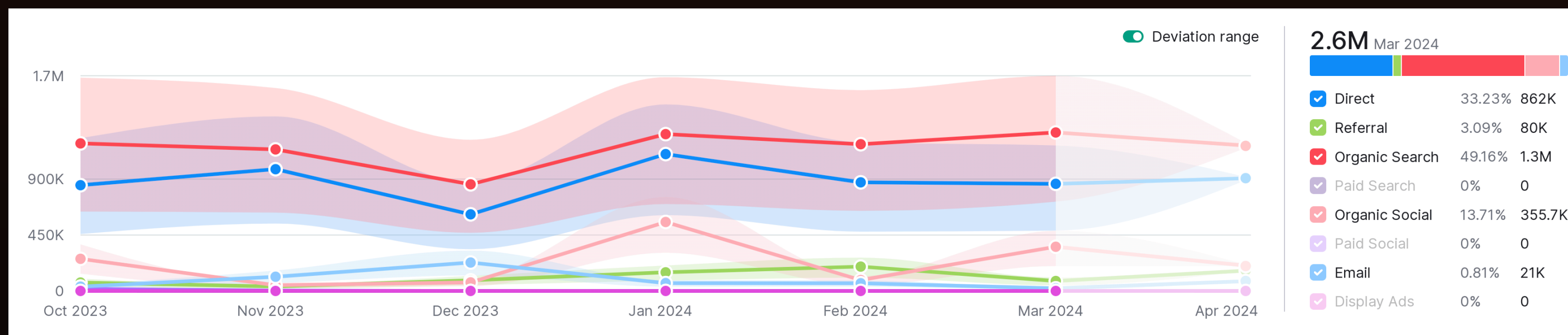
A TALE OF TWO SITES

✓ Differences in audience behavior abound. But first, the obvious: Palm Beach Post leads the local landscape and has significantly more total and Organic traffic than WPTV.

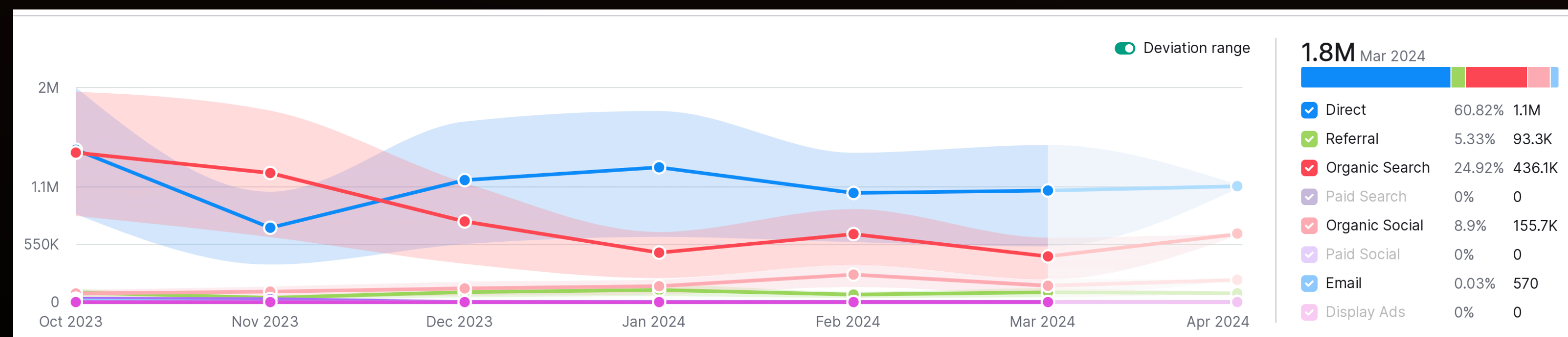
WPTV, however, enjoys greater brand recall. The trend of the blue line indicates the audience seeks them out directly when news breaks, in part why their direct traffic is +250K vs. PBP.

So, in summary, the local audience goes to WPTV for live coverage, and PBP the "day after" for longer-form journalism.

The Palm Beach Post: #1 in Total & Organic Traffic



WPTV: #1 in Direct (ie. Branded) Traffic



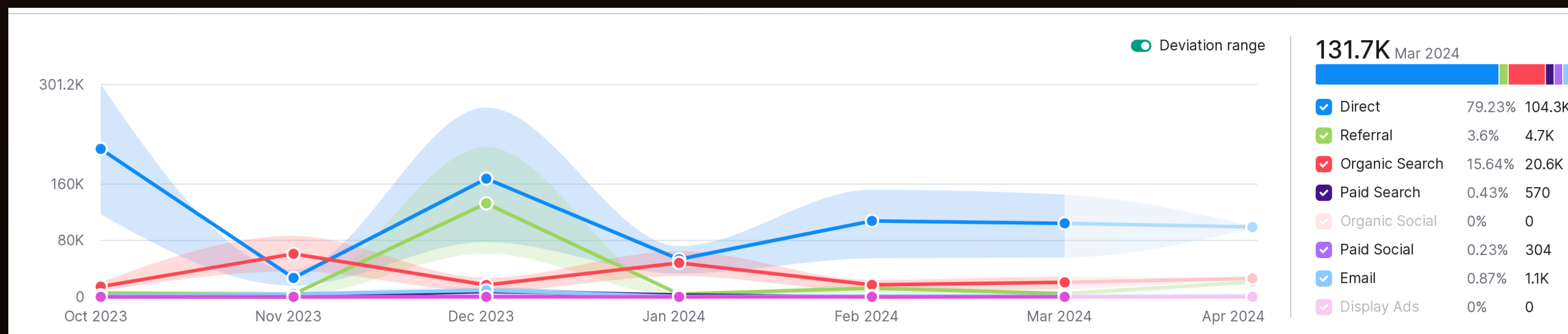
(ANOTHER) TALE OF TWO SITES

✓ Two world-renowned institutions call the West Palm Beach DMA "home." For the Kravis Center and The Norton, sharing a hometown is where the similarities end online.

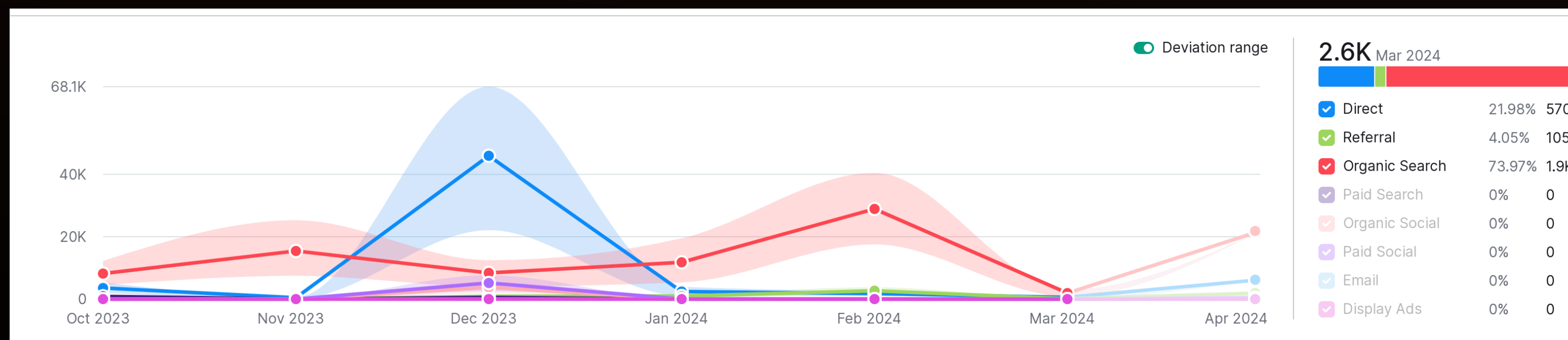
The direct vs. organic traffic pattern of the Kravis indicates a deeply-engaged, incumbent audience. The Norton, on the other hand is discovery-driven by tourist and art aficionados.

All of this means one thing for local premium Brands considering sponsorship or partnership: The Kravis Center's audience is *who you want to know you*. The Norton's is *who else you may want to know*.

Kravis Center



The Norton





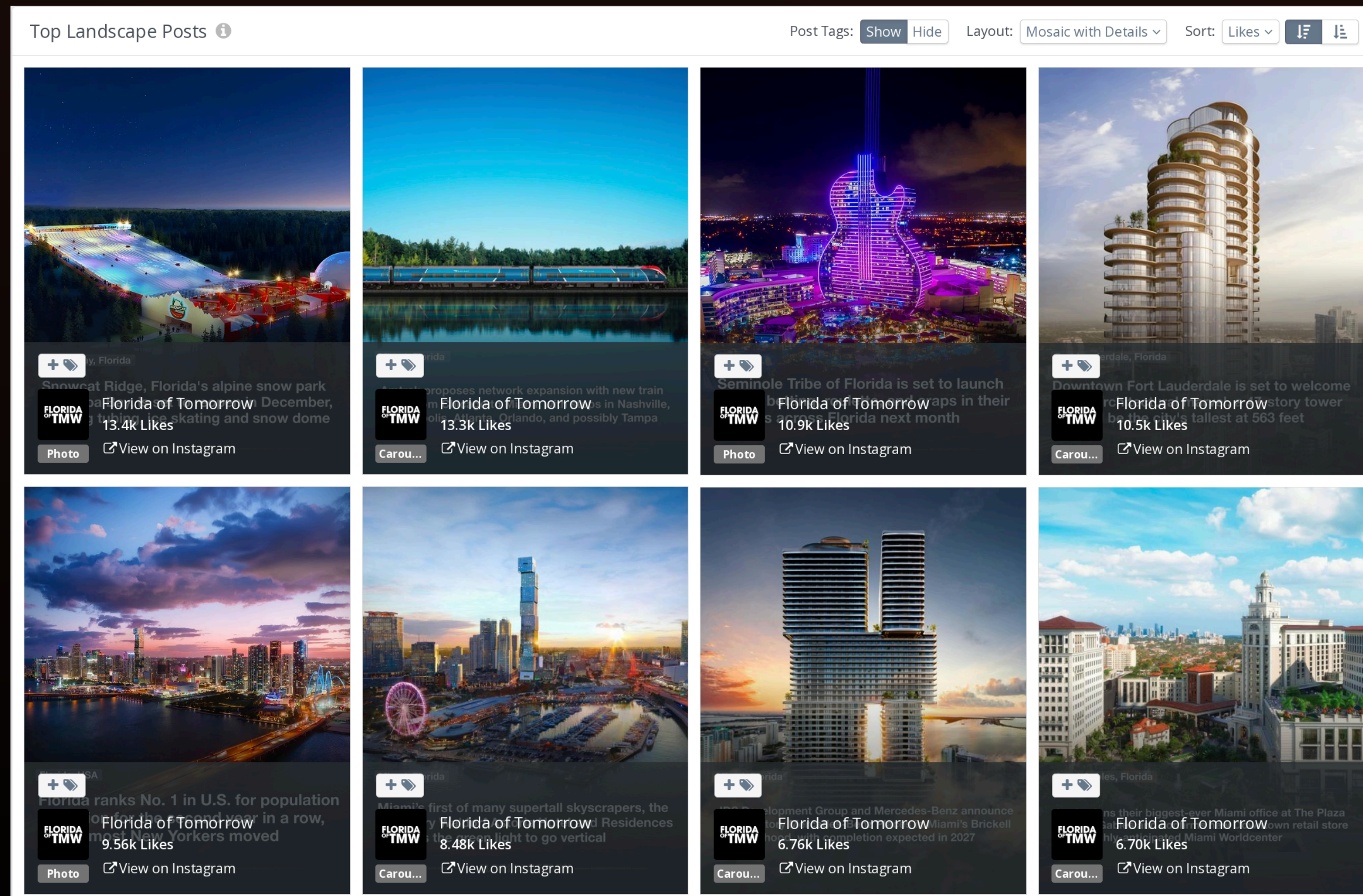
**WHAT THE AUDIENCE
“LIKES” (LOVES): TOP
INSTAGRAM POSTS**

ONE CLEAR LEADER

✓ Cultural institutions and local destinations and developments are no match for **Florida of Tomorrow** when it comes to Instagram engagement, who posted the Top 8 most-liked posts during the time.

The only other accounts to rank in the Top 16 were **Nora West Palm**, and **NDT Development's** announcements for Cove Club and Lola 41 Naples.

In a change from 2023, posts from **The Square** and **The Royal** did not appear in the Top 16.

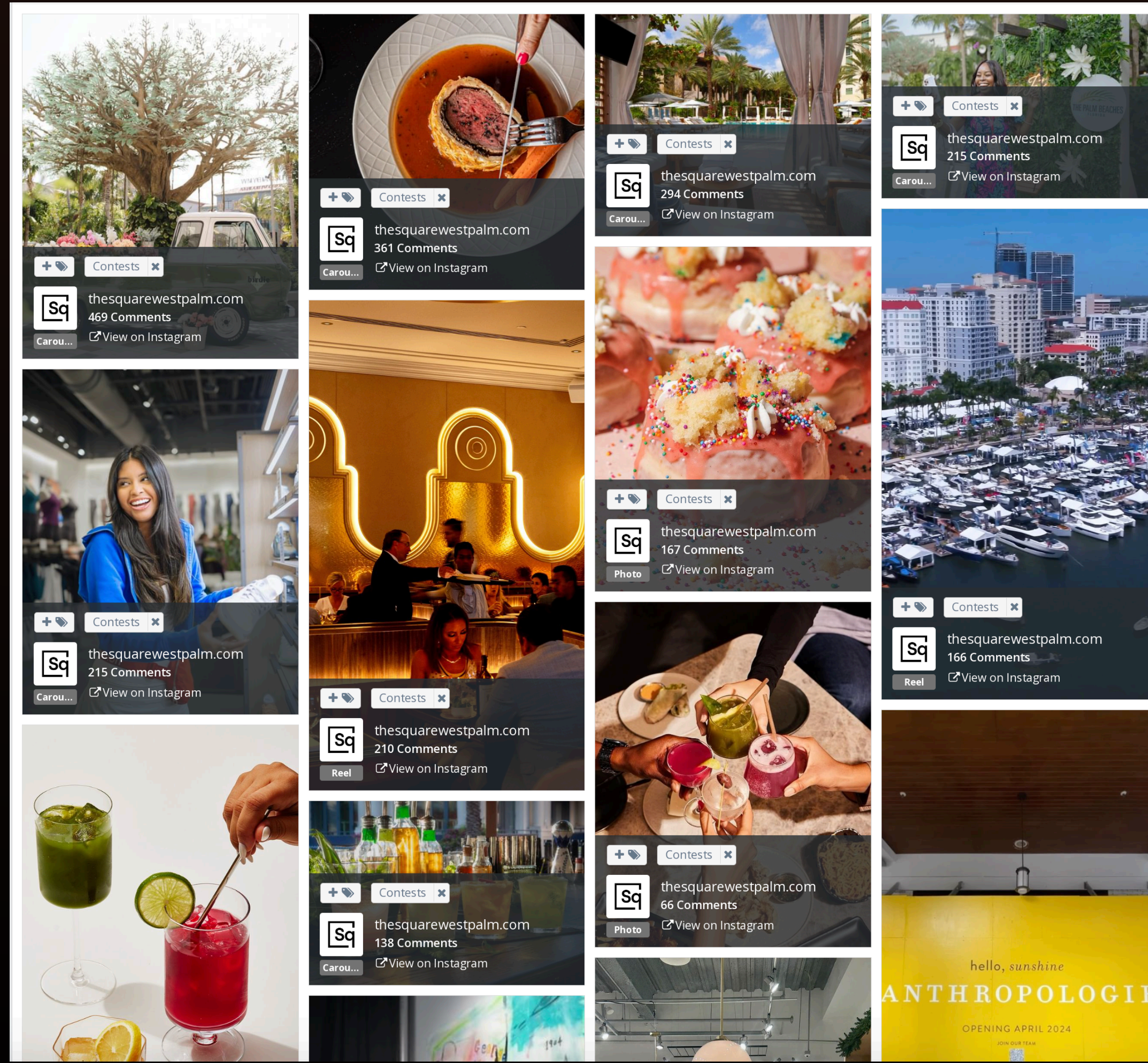


CONTESTS FOR THE WIN

✓ Most marketing minds recognize it's difficult to top the engagement generated by a contest. The Square's Instagram account embodies that more than any other audience segment in the DMA.

Of its Most-Commented posts of the Season, 100% of them involved a Contest (shown at right).

This not only shows an engaged audience, but one that's always ready to act on the opportunity for a giveaway.







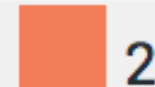

































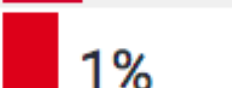


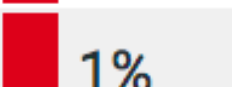


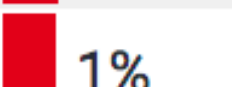


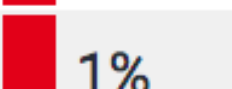


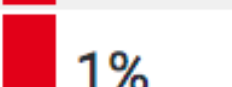





**THE STATE OF TV: INSIDE
AREA CONSUMERS'
LIVING ROOM**

NETWORK VIEWERSHIP

✓ Within the Top 5, Fox and MSNBC benefit from standalone streaming products, while CBS' Paramount+ makes gradual local gains without losing its core linear audience.

What does this chart mean for advertisers overall? That there's a clear decision for reaching Palm Beach County consumers: Buy only the top 4 for Reach and impact, and be audience-precise via streaming options with the rest of your budget.

| Network Breakdown | | | | |
|-------------------|---------------------------|--|--|--|
| | Network | Linear Percent | Ctv Percent | Percent of Total |
| 1 | ABC |  57.35% |  21.12% |  11% |
| 2 | NBC |  57.41% |  22.22% |  10% |
| 3 | CBS |  59.20% |  23.29% |  9% |
| 4 | Fox News Channel |  54.65% |  26.08% |  9% |
| 5 | msnbc |  60.54% |  28.50% |  3% |
| 6 | Home & Garden Televi... |  69.34% |  21.32% |  3% |
| 7 | ION |  68.12% |  22.84% |  3% |
| 8 | Cable News Network |  66.77% |  25.41% |  3% |
| 9 | Hallmark Channel |  71.98% |  20.93% |  2% |
| 10 | Food Network |  73.03% |  19.50% |  2% |
| 11 | FOX |  68.17% |  25.51% |  2% |
| 12 | TBS Superstation |  70.42% |  22.35% |  2% |
| 13 | Turner Network Televis... |  70.55% |  21.83% |  1% |
| 14 | USA Network |  73.46% |  21.80% |  1% |
| 15 | CW |  71.81% |  19.93% |  1% |
| 16 | The Learning Channel |  71.06% |  23.98% |  1% |
| 17 | TV Land |  76.25% |  22.68% |  1% |
| 18 | Investigation Discovery |  77.40% |  19.50% |  1% |
| Totals | | 65.28% | 23.80% | 100% |

FAMILIAR FACES

✓ Nearly 63 million total devices in the area were served ads during season — the vast majority of which were on linear television. But, why does it matter?

Knowing who the average consumer hear from most often, and how, gives you a window into their world that can be useful in shaping how you communicate with them.

Overall, this is a mixed market: meaning both category leaders and challengers are aggressively angling for consumer mindshare.

Top Advertisers (Linear Vs. Digital)

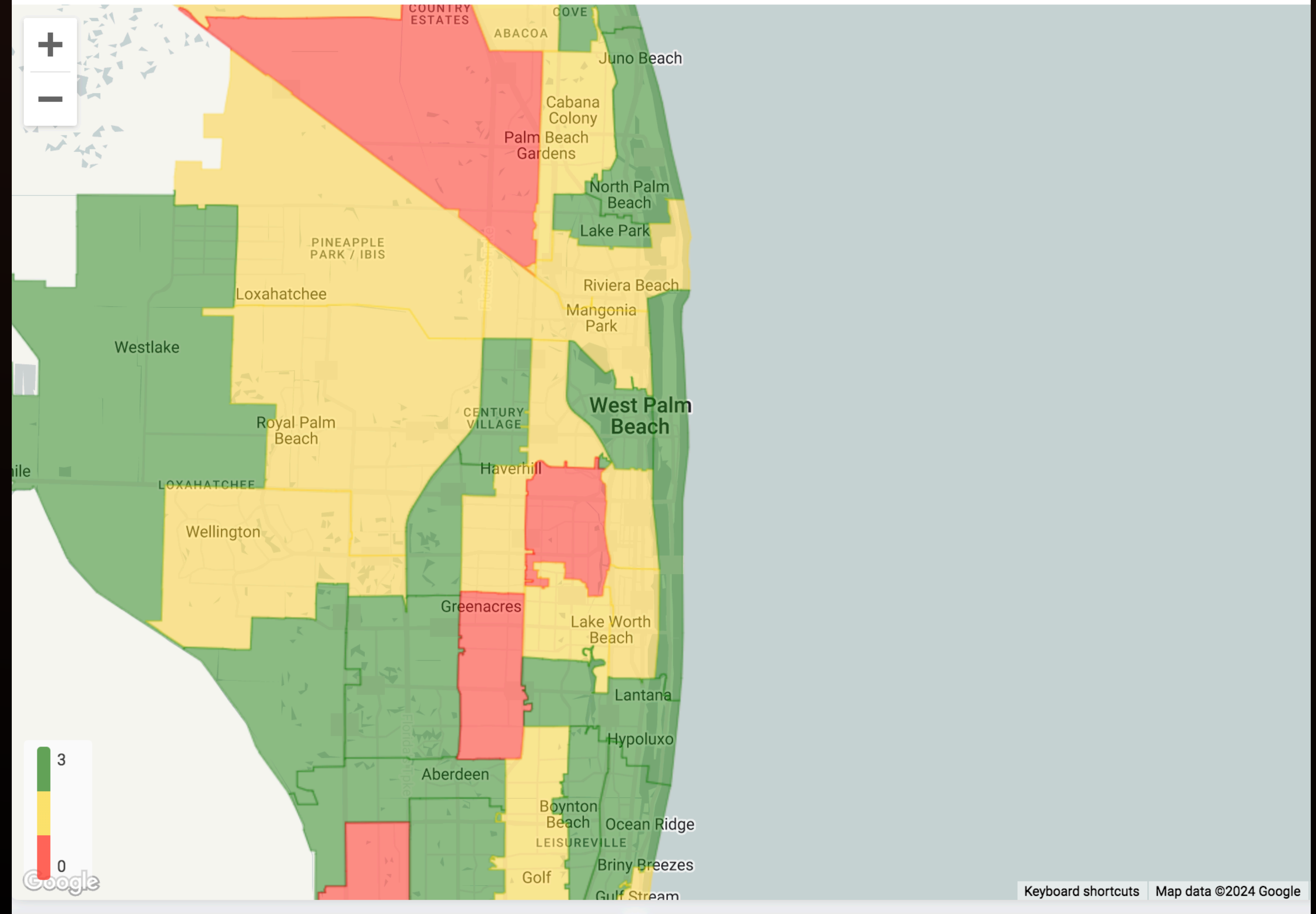
| | ACR Attributes Advertiser | Metrics Ctv Percent | Metrics Linear Percent | Metrics Total Count |
|--------|---------------------------------|---------------------|------------------------|---------------------|
| 1 | Unknown | 24.65% | 67.20% | 673,792 |
| 2 | HBO Max | 21.91% | 72.25% | 652,022 |
| 3 | Xfinity | 13.82% | 74.32% | 531,998 |
| 4 | Paramount+ | 25.98% | 63.56% | 518,593 |
| 5 | Progressive | 26.87% | 63.82% | 494,282 |
| 6 | Morgan & Morgan Injury Law Firm | 21.30% | 63.12% | 432,448 |
| 7 | Burger King | 22.12% | 70.31% | 391,859 |
| 8 | L'Oreal | 21.04% | 69.14% | 347,285 |
| 9 | Peacock TV | 23.86% | 64.26% | 339,202 |
| 10 | Skechers | 25.29% | 66.29% | 338,931 |
| 11 | Liberty Mutual Insurance | 23.43% | 67.07% | 333,096 |
| 12 | National Floors Direct | 20.59% | 58.53% | 325,513 |
| 13 | The Home Depot | 24.74% | 68.10% | 320,921 |
| 14 | Macy's | 21.74% | 69.21% | 314,695 |
| 15 | HULU | 23.05% | 63.82% | 311,261 |
| 16 | Consumer Cellular | 22.90% | 66.18% | 297,281 |
| 17 | Wendy's | 22.25% | 70.63% | 296,654 |
| 18 | The Farmer's Dog | 24.22% | 63.65% | 292,833 |
| 19 | Domino's Pizza | 19.96% | 75.09% | 285,877 |
| 20 | Dupixent | 22.13% | 64.34% | 284,529 |
| 21 | Verizon Communications | 27.47% | 61.08% | 268,744 |
| 22 | Balance Of Nature | 25.38% | 56.36% | 266,116 |
| 23 | Lowe's | 23.36% | 67.89% | 249,109 |
| 24 | Purina | 21.35% | 71.89% | 246,502 |
| 25 | Rexulti | 22.02% | 65.93% | 241,671 |
| 26 | Skyrizi | 22.83% | 66.16% | 239,323 |
| 27 | Safelite | 21.97% | 64.17% | 238,900 |
| 28 | Ro Company | 24.61% | 62.53% | 232,460 |
| 29 | Allstate | 25.64% | 60.53% | 223,212 |
| 30 | Subway | 22.97% | 69.73% | 218,637 |
| Totals | | 24.20% | 65.28% | 62,684,344 |

MIXED CONSUMPTION

✓ For myriad reasons, means of content consumption varies greatly within the County this year —underscoring the importance of a precise media strategy for Premium brands.

Knowing how your audience prefers to consume video content gives you a clear in media planning and budgeting.

Streaming (Green), Mixed (Yellow), or Linear (Red) Zip Breakout



NO INCOME CORRELATION

✓ The top 15 highest-earning ZIP codes demonstrate income has no correlation to streaming viewing habits within the DMA.

However, 33477 — home to The Bear’s Club, Admiral’s Cove and Frenchman’s Creek — present outsize opportunities for streaming ads to connect with one of the most exclusive and sought-after consumer audiences in the Nation.

| | ACR Attributes Postal Code | Metrics Household Income Median | Metrics Ctv Percent |
|----|----------------------------|---------------------------------|---------------------|
| 1 | 33480 | 144,300 | 34.74% |
| 2 | 33449 | 142,056 | 38.25% |
| 3 | 33473 | 131,484 | 4.99% |
| 4 | 33478 | 130,041 | 22.61% |
| 5 | 32963 | 126,650 | 10.66% |
| 6 | 33418 | 110,482 | 17.84% |
| 7 | 33498 | 110,440 | 42.29% |
| 8 | 33412 | 107,822 | 19.69% |
| 9 | 33483 | 106,108 | 23.78% |
| 10 | 34990 | 105,527 | 24.68% |
| 11 | 33477 | 99,865 | 65.84% |
| 12 | 33496 | 97,855 | 56.91% |
| 13 | 33470 | 97,741 | 32.90% |
| 14 | 33414 | 95,941 | 20.92% |
| 15 | 33486 | 94,338 | 24.69% |



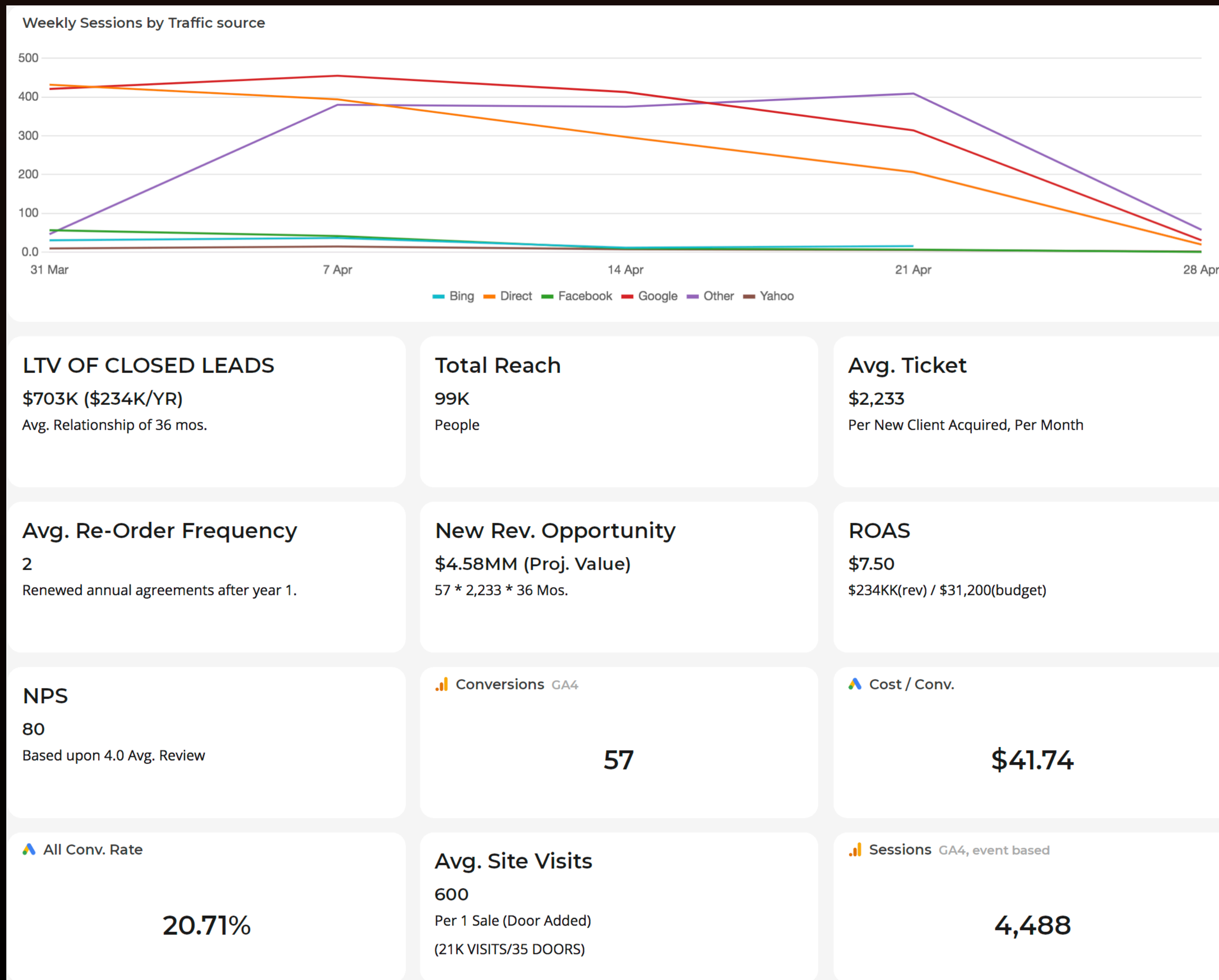
**PREVIEW: THE VALUE OF
FULL-LIFECYCLE
MARKETING**

A "LIFETIME" SCORECARD

✓ It's time to go beyond the campaign, the click and the conversion. Like, way beyond.

Imagine knowing the new revenue in your leads pipeline, your Net Promoter Score and the **Lifetime Value** of your marketing efforts in a *single scorecard* — all produced by your Marketing Agency of Record.

Now you can. Take a sneak peek at our Customer Lifecycle Engagement scorecard here.



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- ✓ [McKinsey attributes the value of personalized marketing](#)
- ✓ [Microsoft CoPilot now available to advertisers](#)
- ✓ [Google's March Core Algo update is complete](#)

AREA BUSINESSES:

CONSIDERING YOUR OFF-SEASON PLAN, OR
PLANNING AHEAD FOR NEXT SEASON?

LINCOLN DIGITAL GROUP IS PROVEN TO HELP
CONSUMER BRANDS THRIVE IN THIS THRIVING
MARKET — [GET IN TOUCH TODAY.](#)