



Report on Palm Beach County Tourism First Quarter 2008 (January, February and March)

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Introduction: 1st Quarter 2008

Background

- The following report contains information collected during the 1st Quarter of 2008 (January, February and March), second quarter of Fiscal Year 2007/2008.
- Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.



Property Manager Survey: 1st Quarter 2008

Occupancy Rates

- **In the first quarter of 2008, the average occupancy rate for Palm Beach County surveyed hotels was 78.9%. This is 16.1 percentage points higher than last quarter (62.8%) and relatively comparable (1.9 percentage points lower) with the same quarter last year (80.8%).**
 - The average occupancy rate among larger properties (101+ rooms) was 79.6% and 74.5% among smaller properties (50-100 rooms).
- **Hotels located in the Central region of Palm Beach County reported the highest average occupancy rate (83.4%). The average occupancy rate for hotels in the Northern region was 78.5% and 74.7% in the Southern region.**
 - Hotels from all three regions reported increases in occupancy rates compared to last quarter (Northern – 57.7%, a 20.8 percentage point increase, Central – 63.8%, a 19.6 percentage point increase and Southern – 64.6%, a 10.1 percentage point increase).
 - Compared to 1Q2007, the average occupancy rate decreased among properties in the Southern region by 5.8 percentage points (from 80.5% to 74.7%). Average occupancy rates among properties in the Northern and Central regions were comparable to those reported in 1Q2007 (Northern – 78.1%, Central – 82.8%).
- **The estimated number of hotel room nights occupied* during the first quarter of 2008 was 1,050,605 – an increase of 205,695 room nights compared to the prior quarter (844,910) and a decrease of 20,129 room nights compared to 1Q2007 (1,070,734).**
- **According to responding hotel managers, 5.5% of hotel guests were from other countries. This is 1.0 percentage point lower than last quarter (6.5%) and 2.5 percentage points higher than the first quarter of last year (3.0%).**
 - Property managers from smaller hotels (50-100 rooms) reported that, on average, 7.1% of their guests were traveling internationally, while those from larger properties (101+ rooms) claimed that, on average, 5.0% of their guests were international travelers.
 - As in 4Q2007 (8.8%) and 1Q2007 (4.9%), hotels in the Southern region of Palm Beach County continued to report the highest percentage of guests traveling internationally (7.8%). In 1Q2008, property managers in the Northern and Central regions reported that 3.0% and 4.6% of their guests, respectively, were international travelers.
- **During 1Q2008, leisure travelers occupied more hotel rooms (40.9%) than business (29.3%) or convention/group travelers (29.8%).**
- **Hotels designated as convention hotels reported that 31.7% of their bookings were made by convention/group travelers. This is at parity with last quarter (31.2%) and represents an increase of 2.3 percentage points compared to 1Q2007 (29.4%).**

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 1st Quarter 2008

Average Daily Room Rate (ADR)

- The ADR in 1Q2008, as reported by participating Palm Beach County property managers, was \$232.14 – this represents a 54.6% (\$81.96) increase compared to last quarter (\$150.18) and a 13.6% (\$27.81) increase compared to the same quarter last year (\$204.33).
 - Smaller properties (50-100 rooms, \$255.89) reported a 75.7% increase in ADR compared to last quarter (\$145.62) and a 33.1% increase compared to the same quarter last year (\$192.28). Larger properties (101+ rooms, \$229.51) cited a 51.4% increase compared to 4Q2007 (\$151.60) and an 11.3% increase compared to 1Q2007 (\$206.22).
 - Among larger properties, hotels with 101-219 rooms reported an ADR of \$160.13 (a 10.9% increase from 1Q2007, \$144.39) and hotels with 220-500 rooms reported an ADR of \$249.30 (a 19.4% increase from 1Q2007, \$208.85). Both hotels with 101-219 rooms and hotels with 220-500 rooms reported increases in ADR relative to 4Q2007 (by 62.1% among hotels with 101-219 rooms and by 46.4% among hotels with 220-500 rooms).

Future Business Outlook

- Regarding the business outlook for the next two months as compared to the same months last year, 47.0% of surveyed hotel managers predict a decrease in total room revenue (42.0% Group/Individual Business, 54.3% Individual Vacation). Approximately one-third expect an increase (32.3%, 37.3% Group/Individual Business, 21.8% Individual Vacation) and 20.7% expect no change (20.7% Group/Individual Business, 23.9% Individual Vacation)* in future business outlook compared to the same months last year.
 - Among hotel managers anticipating an increase in room revenue compared to the previous year, the average increase expected is 10.9% (8.5% - Group/Individual Business, 11.6% Individual Vacation).*
 - Among hotel managers expecting a decrease in room revenue compared to the previous year, the average decrease expected is 7.9% (9.1% - Group/Individual Business, 10.1% Individual Vacation).*
- When predicting changes in room revenue for the following third and fourth months relative to the same months last year, 39.6% of surveyed managers expect an increase in total room revenue (39.1% Group/Individual Business, 22.9% Individual Vacation), 37.5% expect a decrease (36.7% Group/Individual Business, 51.9% Individual Vacation) and 22.8% predict no change (24.2% Group/Individual Business, 25.2% Individual Vacation).*
 - Among hotel managers who expect an increase in room revenue compared to the previous year, the average increase expected is 8.9% (9.9% - Group/Individual Business, 10.3% Individual Vacation).*
 - Among hotel managers who foresee a decrease in room revenue compared to the previous year, the average decrease expected is 8.0% (10.0% - Group/Individual Business, 8.9% Individual Vacation).*

Bookings Via Third Party Websites

- On average, 14.5% of Palm Beach County hotel reservations were made through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc.) during 1Q2008. This is comparable to last quarter (15.1%) and represents a 3.2 percentage point increase from 1Q2007 (11.3%).
 - As seen throughout the past year, smaller properties (50-100 rooms) continued to report a larger percentage of bookings sold via third party websites (21.8%) than larger properties (101+ rooms, 9.4%) in 1Q2008.

* Based on those responding for each (total, group/individual business, individual vacation)



Property Manager Survey: 1st Quarter 2008

Market Focus

- The Florida Leisure (88.2%) and Business (72.7%) Drive Markets continued to be the main focus of surveyed hotel managers' marketing, advertising and promotion efforts in 1Q2008.
- Property managers surveyed during 1Q2008 mentioned various market areas in need of support from the CVB and Sports Commission (see full lists on pages 22 and 23).
 - The top responses cited by property managers when asked for what areas they needed assistance from the CVB were 'Weekend business', 'All/They could assist us with all market segments', and 'Summer business'. All of the above mentions, as well as 'More sports teams', were the top areas requiring assistance from the Sports Commission,



Hotel Visitor Survey: 1st Quarter 2008

Characteristics of Stay

- The average party size of hotel guests surveyed during the first quarter of 2008 was 2.0*. The median party size for 1Q2008 was 2.0, as was the case for all months within the quarter, as well as last quarter and last year.
- Surveyed visitors stayed, on average, 3.5 nights in a hotel and occupied an average of 1.3 rooms per night*.

Planning the Trip to Palm Beach County

- More than six-in-ten surveyed guests (62.5%) were in Palm Beach County on a business trip (conference/convention/business meeting); more than one-half came for a 'business meeting' (51.2%). Vacationers represented one-third of guests surveyed during 1Q2008 (32.7%).
 - Compared to the same quarter last year, more business travelers and fewer leisure travelers visited Palm Beach County in 1Q2008 (business travelers - increased from 55.1% in 1Q2007 to 62.5% in 1Q2008, leisure travelers - decreased from 34.9% to 32.7%).
 - The percentage of business travelers and vacationers in 1Q2008 was at parity with last quarter (business travelers – 62.2% in 4Q2007 and 62.5% in 1Q2008, leisure travelers – 33.3% in 4Q2007 and to 32.7% in 1Q2008).
- A 'work related trip' was the reason six-in-ten surveyed guests traveled to Palm Beach County instead of another destination (59.6%). Visitors also frequently cited 'Visit friends/relatives' (19.6%) and a 'Previous visit' (15.1%) as reasons to come to Palm Beach County.
 - Reflecting the pattern of business travel to Palm Beach County, citing of 'work related trip' as a reason for selecting PBC was comparable to last quarter (59.8%) and increased compared to 1Q2007 (54.9%, up 4.7 percentage points).
- According to 57.7% of surveyed guests, their employers made the decision regarding the trip to Palm Beach County. This is equivalent to last quarter (57.7%) and is 3.6 percentage points higher than the same quarter last year (54.1%).
 - Approximately one-third of surveyed hotel guests claimed the decision was made by the head of the household/other adult (34.2%).
- Short term planners (planned the trip one month or less in advance) comprised 53.0% of hotel guests surveyed in 1Q2008. This is at parity with 1Q2007 (52.1%) and represents a 6.5 percentage point decline compared to last quarter (59.5%).

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.



Hotel Visitor Survey: 1st Quarter 2008

Booking a Trip to Palm Beach County

- **Use of a travel agent and use of the Internet to book any part of a visitors' trip to PBC declined in 1Q2008 relative to the prior quarter (travel agent – from 25.0% in 4Q2007 to 21.4%, down 3.6 percentage points; Internet – from 51.1% to 44.5%, down 6.6 percentage points).**
- **Compared to the same quarter last year, use of a travel agent decreased by 2.3 percentage points (from 23.7% in 1Q2007 to 21.4% in 1Q2008), while use of the Internet (44.5%) was at parity with 1Q2007 (44.9%).**
 - Most surveyed guests who used the Internet to book part of the trip to PBC used it to book airfares (70.7%) and hotel rooms (64.7%). More than one-third used the Internet to book car rentals (37.8%).
 - Hotel visitors surveyed in 1Q2008 were less likely to use the Internet to reserve hotel rooms (64.7%) than those surveyed during the prior quarter (77.7%, a 13.0 percentage point decline).
 - Use of the Internet to book hotel rooms in 1Q2008 (64.7%) remained about the same as in 1Q2007 (64.8%).
 - Hotel websites were used most often by surveyed visitors to reserve rooms online in 1Q2008 (32.9%). This represents a 2.2 percentage point decrease compared to 4Q2007 (35.1%) and an increase of 4.5 percentage points compared to 1Q2007 (28.4%).
 - Those who claimed that the trip to Palm Beach County was part of a package comprised only 3.7% of surveyed guests. This is 3.5 percentage points lower than 1Q2007 (7.2%) and is at parity with last quarter (4.1%).

Visitor Expenditures

- **In 1Q2008, the average per party* expenditure in Palm Beach County was \$1,852 – \$470 (34.0%) more than the average per party expenditure last quarter (\$1,382) and \$146 (8.6%) more than the average per party expenditure in 1Q2007 (\$1,706).**
 - With the exception of 'Entertainment/recreation', which decreased in 1Q2008 (from \$63 to \$42, a 33.3% decrease), all other spending categories increased compared to the first quarter of 2007.
 - The average per person expenditure in the current quarter (\$926) increased compared to both 4Q2007 (\$728, up 27.2%) and 1Q2007 (\$812, up 14.0%) .
- **Vacationers spent, on average, \$2,475 per party, while business travelers per party expenditures averaged \$1,436.**
 - Both leisure and business travelers' per party expenditures increased compared to last quarter (leisure - up 40.0%, from \$1,768 to \$2,475 and business travelers – up 20.9%, from \$1,188 to \$1,436) and the same quarter last year (leisure - \$2,284, up 8.4% and business travelers – \$1,375, up 4.4%).

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.



Hotel Visitor Survey: 1st Quarter 2008

Characteristics of Visitors

- The majority of Palm Beach County visitors were White/Caucasian (93.8%) and were between the ages of 35 and 54 (56.3%).
- Most visitors claimed to have professional/managerial jobs (63.4%) and an annual household income of \$100,000 or greater (75.2%).
- Vacationers typically traveled with 'Adult family members and/or friends' (84.6%), while business travelers were usually traveling alone (50.9%) or with business associates (35.1%).

Travel Details

- As seen in prior quarters, Palm Beach County continued to be the main destination for more than ninety percent of surveyed visitors (92.1%).
- More than one-quarter of surveyed guests were visiting Palm Beach County for the first time (26.2%).
- Most surveyed guests traveled by air to come to Palm Beach County in 1Q2008 (82.5%). This is up 6.6 percentage points compared to last quarter (75.9%); car travel decreased by 7.0 percentage points compared to the same time period (from 29.7% in 4Q2007 to 22.7% in 1Q2008).

Attitudes toward Palm Beach County

- More than one-half of respondents reported that the 'Climate/weather' was the aspect of Palm Beach County they liked best (52.4%).
- 'Traffic/bad drivers' (35.4%) and 'Humidity/poor weather' (10.2%) continued to be mentioned most often as the aspects visitors liked least about their trip to Palm Beach County.
- The next time surveyed guests visit Palm Beach County they would like to stay longer (21.2%), experience better weather (9.4%), find better traffic conditions (8.4%), bring family members/friends (8.2%) and/or come during vacation/time off from work (7.9%).

Activity Participation

- Almost all hotel guests surveyed in 1Q2008 reported eating at restaurants in Palm Beach County (95.5%).
- Shopping (31.1%), going to the beach (25.6%), playing golf/tennis (12.6%) and/or swimming (11.3%) were other activities visitors enjoyed while in Palm Beach County.

Return Visits

- **As in the previous quarter (84.3%), more than eight-in-ten surveyed guests have plans to return to Palm Beach County in the future (83.0%). Only 2.6% reported that they will not return. The remainder (14.4%) are uncertain as to whether or not they will return to PBC in the future.**
 - Among those who plan to visit Palm Beach County again, 73.5% plan to do so in the next year; 30.2% plan to return within the next three months.
 - Those who claimed they will not visit PBC again cited the following reasons for such: 'No business in the area', 'Too expensive', 'Prefer other destinations', 'Too far', 'Too crowded', and 'Have not been invited to come back'. Forty three point one percent did not provide a reason for not returning.



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Property Manager Survey



Methodology

Property Manager Survey

Each month, self-administered surveys are completed by hotel Property Managers throughout Palm Beach County.

The occupancy rate is derived by weighting the responding occupied room nights by the available room nights* in Palm Beach County.

The product of the average daily room rate for each hotel size category and the occupied room nights in the county for each corresponding category equals lodging revenues per size category. The addition of all the individual lodging revenue equals total lodging revenue for the county.

The average daily room rate (ADR) is computed by dividing the total lodging revenue by the occupied room nights in the county*.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 1st Quarter 2008

	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
Occupancy Rate								
Month/Quarter	78.9%	73.0%	81.8%	81.8%	80.8%	68.5%	56.0%	62.8%
FYTD (Oct. - Set.)	70.8%	65.3%	68.6%	70.8%	72.7%	71.2%	67.4%	62.8%
Room Nights Occupied^{1*}								
Month/Quarter	1,050,605	330,149	347,693	372,763	1,070,734	935,524	763,604	844,910
FYTD (Oct. - Set.)	1,895,515	1,175,059	1,522,752	1,895,515	1,929,036	2,864,560	3,628,164	844,910
Percentage of Room Nights Occupied								
Leisure	40.9%	42.2%	38.6%	42.0%	41.5%	35.1%	42.8%	41.2%
Business	29.3%	25.4%	32.7%	29.2%	31.9%	32.9%	32.9%	31.4%
Convention/Group	29.8%	32.4%	28.6%	28.8%	26.6%	31.9%	24.3%	27.4%
Average Daily Room Rate²	\$232.14	\$222.37	\$232.92	\$241.20	\$204.33	\$146.19	\$110.65	\$150.18

1. Room nights occupied = ((# total rooms*occupancy) * (# of room nights per month/quarter))

2. ADR = Average rate per occupied room.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 1st Quarter 2008

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>00/01</u>	<u>01/02</u>	<u>02/03</u>	<u>03/04</u>	<u>04/05</u>	<u>05/06</u>	<u>06/07</u>	<u>07/08</u>
1st Quarter (Jan/Feb/Mar)	N/A	76.2	77.9	83.8	88.3	84.7	80.8	78.9
January	74.7	69.0	71.3	74.2	84.0	79.7	73.8	73.0
February	85.5	81.4	81.7	88.8	91.1	86.3	82.8	81.8
March	84.9	79.7	81.4	88.4	89.9	87.1	85.6	81.8
2nd Quarter (April/May/June)	N/A	65.1	67.0	71.8	72.7	71.0	68.5	N/A
3rd Quarter (July/Aug/Sept)	N/A	57.3	57.8	64.2	63.0	56.9	56.0	N/A
4th Quarter (Oct/Nov/Dec)	N/A	57.5	59.8	64.2	79.8	73.1	64.6	62.9
Fiscal YTD (Oct. – Sept.)	67.3	64.1	65.7	70.9	76.0	71.2	67.4	70.8
Number of Room Nights Occupied in 1st Quarter*							1,070,734	1,050,605

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 1st Quarter 2008

	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
Conference/Convention Bookings								
<u>All Hotels</u>								
% Occupied Room Nights in County	29.8%	32.4%	28.6%	28.8%	26.6%	31.9%	24.3%	27.4%
Occupied Room Nights in County	313,863	107,067	99,440	107,356	284,042	298,110	185,319	234,597
Occupied Room Nights in County FYTD (Oct. - Sept.)	548,460	341,664	441,104	548,460	496,345	794,455	979,774	234,597
<u>Convention Hotels</u>								
% Occupied Room Nights	31.7%	37.0%	30.2%	28.3%	29.4%	34.9%	26.6%	31.2%
Occupied Room Nights	192,168	69,786	60,352	62,030	199,451	213,173	122,959	156,420
Occupied Room Nights FYTD (Oct. - Sept.)	348,588	226,206	286,558	348,588	363,114	576,287	699,246	156,420
Available Inventory*								
Rooms in County	43,946	14,589**	14,657**	14,700**	44,219	45,110	44,384	43,934
Room Nights	1,333,012	452,259	425,053	455,700	1,326,854	1,368,423	1,361,116	1,347,398
Room Nights FYTD (Oct. - Sept.)	2,680,410	1,799,657	2,224,710	2,680,410	2,657,174	4,025,597	5,386,713	1,347,398
Response Rate								
Month/Quarter (for all hotels in County)	60.2%	60.5%	60.0%	60.1%	62.3%	60.3%	60.9%	62.8%
FYTD (Oct. - Sept.)	61.5%	62.3%	61.8%	61.5%	62.1%	61.5%	61.4%	62.8%

* Properties well below 50 rooms are only included in room count and total inventory.

** Number of rooms used for research purposes/data projections; actual total number of rooms available in Palm Beach County is 18,375.



Property Manager Survey: 1st Quarter 2008

Occupancy Rate	Total 1Q 2008	Jan.	Feb.	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Size of Hotel								
50 - 100 Rooms	74.5%	69.0%	79.1%	76.2%	80.5%	62.3%	51.6%	58.7%
101 + Rooms	79.6%	73.7%	82.3%	82.8%	80.8%	69.5%	56.8%	63.5%
101-219	78.8%	72.8%	82.3%	81.3%	81.0%	68.5%	56.2%	63.1%
220-500	80.4%	74.3%	81.3%	85.1%	81.0%	71.2%	60.6%	64.7%
All Properties	78.9%	73.0%	81.8%	81.8%	80.8%	68.5%	56.0%	62.9%
Geographic Region								
North	78.5%	76.3%	78.2%	81.5%	78.1%	70.3%	55.9%	57.7%
Central	83.4%	76.0%	87.2%	87.0%	82.8%	70.0%	59.7%	63.8%
South	74.7%	68.1%	78.7%	77.2%	80.5%	66.2%	52.7%	64.6%

What percent of your occupancy is international?	Total 1Q 2008	Jan.	Feb.	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Size of Hotel								
50-100 Rooms	7.1%	4.4%	6.1%	10.6%	5.9%	6.2%	17.5%	10.9%
101 + Rooms	5.0%	5.3%	5.1%	4.7%	2.6%	2.8%	5.0%	5.7%
101-219	5.1%	6.5%	5.0%	4.3%	2.3%	2.6%	5.8%	7.8%
220-500	7.3%	6.2%*	7.2%*	8.2%	2.4%	1.5%	2.7%	4.3%
All Properties	5.5%	5.4%	5.5%	5.4%	3.0%	3.4%	6.6%	6.5%
Geographic Region								
North	3.0%	3.4%	3.2%	2.2%	1.8%	3.8%	1.9%	3.1%
Central	4.6%	4.2%	5.3%	4.3%	2.4%	2.1%	4.4%	5.3%
South	7.8%	9.2%	7.0%	7.7%	4.9%	5.0%	12.2%	8.8%

* Caution: Extremely Low base



Property Manager Survey: 1st Quarter 2008

Average Daily Room Rate	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Size of Hotel								
<u>50 - 100 Rooms*</u>	\$255.89	\$214.39	\$298.20	\$254.10	\$192.28	\$120.28	\$98.11	\$145.62
<u>101 + Rooms</u>	\$229.51	\$224.97	\$222.76	\$240.53	\$206.22	\$149.60	\$112.91	\$151.60
101-219	\$160.13	\$165.55	\$142.32	\$175.04	\$144.39	\$100.58	\$86.64	\$98.77
220-500	\$249.30	\$238.40	\$250.53	\$256.84	\$208.85	\$167.44	\$127.08	\$170.29
<u>All Properties</u>	\$232.14	\$222.37	\$232.92	\$241.20	\$204.33	\$146.19	\$110.65	\$150.18

* Please note that the response rate for hotels with 50-100 rooms was low in February (31.0%) and March (33.8%); the hotels that replied are more upscale with higher rates (i.e. Chesterfield, Colony and Brazilian Court Hotels in Palm Beach).



Property Manager Survey: 1st Quarter 2008

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
1Q		
2006	1,138,435	
2007	1,070,734	- 5.9
2008	1,050,605	- 1.9
January		
2006	371,569	
2007	335,048	- 9.8
2008	330,149	- 1.5
February		
2006	376,256	
2007	351,656	- 6.5
2008	347,693	- 1.1
March		
2006	403,584	
2007	396,156	- 1.8
2008	372,763	- 5.9
2Q		
2006	964,792	
2007	935,524	- 3.0
2008		
3Q		
2006	769,629	
2007	763,604	- 0.8
2008		
4Q		
2006	858,302	
2007	844,910	- 1.6
2008		
FYTD (October – March)		
2006	2,095,383	
2007	1,929,036	- 7.9
2008	1,895,515	- 1.7

+ Room nights unavailable due to hurricane/renovation closures are excluded.

* Properties well below 50 rooms are only included in room count and total inventory.



Property Manager Survey: 1st Quarter 2008

Future Business Outlook (for each month as compared to the same month in previous year)	<u>Total Room Revenue</u>	<u>Group/Indiv. Business Room Revenue</u>	<u>Individual Vacation Room Revenue</u>
February 2008 / March 2008 predictions from January			
Foresee Decrease	39.1%	39.1%	47.1%
Average decrease (among those who foresee decrease)	8.3%	8.3%	8.3%
Foresee No Change	22.4%	17.4%	26.0%
Foresee Increase	38.6%	43.5%	26.9%
Average increase (among those who foresee increase)	11.9%	10.2%	8.5%
March 2008 / April 2008 predictions from February			
Foresee Decrease	50.7%	44.6%	57.3%
Average decrease (among those who foresee decrease)	7.2%	7.2%	9.6%
Foresee No Change	18.5%	27.3%	28.9%
Foresee Increase	30.8%	28.0%	13.7%
Average increase (among those who foresee increase)	12.5%	6.0%	25.9%
April 2008 / May 2008 predictions from March			
Foresee Decrease	52.5%	44.1%	60.4%
Average decrease (among those who foresee decrease)	8.3%	11.9%	12.2%
Foresee No Change	20.4%	18.0%	16.7%
Foresee Increase	27.1%	37.8%	22.9%
Average increase (among those who foresee increase)	7.5%	7.8%	8.2%
First Quarter predictions from January, February and March			
Foresee Decrease	47.0%	42.0%	54.3%
Average decrease (among those who foresee decrease)	7.9%	9.1%	10.1%
Foresee No Change	20.7%	20.7%	23.9%
Foresee Increase	32.3%	37.3%	21.8%
Average increase (among those who foresee increase)	10.9%	8.5%	11.6%



Property Manager Survey: 1st Quarter 2008

Future Business Outlook (for each month as compared to the same month in previous year)	<u>Total Room Revenue</u>	<u>Group/Indiv. Business Room Revenue</u>	<u>Individual Vacation Room Revenue</u>
April 2008 / May 2008 predictions from January			
Foresee Decrease	35.6%	29.4%	46.9%
Average decrease (among those who foresee decrease)	5.5%	8.2%	7.7%
Foresee No Change	23.0%	25.4%	27.9%
Foresee Increase	41.4%	45.2%	25.1%
Average increase (among those who foresee increase)	10.7%	10.9%	6.1%
May 2008 / June 2008 predictions from February			
Foresee Decrease	33.1%	34.2%	47.7%
Average decrease (among those who foresee decrease)	6.0%	8.6%	7.9%
Foresee No Change	19.6%	32.7%	30.0%
Foresee Increase	47.3%	33.1%	22.3%
Average increase (among those who foresee increase)	7.5%	5.0%	16.7%
June 2008 / July 2008 predictions from March			
Foresee Decrease	44.2%	48.2%	62.0%
Average decrease (among those who foresee decrease)	11.4%	12.4%	10.5%
Foresee No Change	25.4%	14.5%	18.2%
Foresee Increase	30.4%	37.3%	19.8%
Average increase (among those who foresee increase)	8.4%	13.1%	9.7%
First Quarter predictions from January, February and March			
Foresee Decrease	37.5%	36.7%	51.9%
Average decrease (among those who foresee decrease)	8.0%	10.0%	8.9%
Foresee No Change	22.8%	24.2%	25.2%
Foresee Increase	39.6%	39.1%	22.9%
Average increase (among those who foresee increase)	8.9%	9.9%	10.3%



Property Manager Survey: 1st Quarter 2008

Bookings via third party website	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
<u>Size of Hotel</u>								
<u>50 - 100 Rooms</u>	21.8%	21.7%	16.0%	24.3%	22.0%	29.7%	25.8%	24.8%
<u>101 + Rooms</u>	9.4%	9.5%	11.1%	8.7%	8.4%	10.0%	9.3%	11.2%
101-219	9.9%	10.0%	11.1%	9.2%	9.5%	11.1%	9.8%	11.1%
220-500	8.1%	8.3%	N/A*	8.0%	4.5%	6.5%	7.7%	12.8%
<u>All Properties</u>	14.5%	14.2%	13.5%	14.7%	11.3%	14.0%	13.3%	15.1%

* Hotels with 220-500 did not report bookings sold via a third party website in February 2008



Property Manager Survey: 1st Quarter 2008

	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
MARKET FOCUS (in terms of marketing, advertising and promotion)								
Florida Leisure Drive Market	88.2%	81.8%	87.8%	96.1%	N/A	N/A	81.8%	67.1%
Florida Business Drive Market	72.7%	65.3%	88.6%	64.3%	N/A	N/A	63.9%	59.7%
Florida Association Market	45.5%	34.7%	55.1%	48.1%	N/A	N/A	35.4%	43.8%
Weddings	62.2%	57.4%	70.9%	58.5%	N/A	N/A	51.5%	53.0%
Amateur Sports Events	61.5%	58.7%	65.9%	59.2%	N/A	N/A	57.5%	50.9%
Convention - Northeast	22.8%	21.7%	25.3%	21.4%	N/A	N/A	18.0%	23.7%
Convention - Mid-Atlantic	11.4%	5.6%	12.0%	17.5%	N/A	N/A	13.4%	12.6%
Convention - South	21.5%	20.5%	25.3%	17.5%	N/A	N/A	15.5%	15.2%
Convention - Midwest	11.2%	6.9%	12.0%	15.5%	N/A	N/A	10.1%	10.9%



Property Manager Survey: 1st Quarter 2008

Market Areas In Need of Assistance from CVB	Total 1Q2008
Weekend business	4
All/They could assist us with all market segments	4
Summer business	3
More groups or city wide in south county	2
Social, Non Profits, Association, Pharmaceuticals, Sport teams	2
SMERF market	2
Bus Tours	2
Weekend SMERF business	1
Overflow from the Convention Center	1
We would like to see the CVB focus on attracting more corp. groups to the market	1
Family reunions	1
More leisure directed to south county	1
Tallahassee Association, Government	1
More Corporate big business in South county	1
Film community	1
International	1
Luxury market	1



Property Manager Survey: 1st Quarter 2008

Market Areas In Need of Assistance from Sports Commission	Total 1Q2008
All/Any and All/They can help with any business they send us	4
Weekend business	3
Summer business	3
More sports teams	3
More events in South County	2
Larger city wide gathering like the Orange Classic in Broward/More focus on city wide events	2
Youth and collegiate sports	2
Scuba Diving/Dive Shows/Diving groups	2
I have not received any leads from the Sports Commission	1
Weekend sport teams	1
Adult Teams	1
Swim teams	1
Fall business	1
Local, Non-profit, Associations, Pharmaceuticals	1



Hotel Visitor Survey



Methodology

Hotel Visitor Survey

Each month, approximately 250 self-administered surveys are completed among visitors staying at hotels throughout Palm Beach County. The hotels were selected according to size and geographic location to represent all hotels in the county.

Survey Changes

In October 2005, the visitors' survey was revised and updated to better address the Tourist Development Council needs in terms of tourist information.

The changes that were made and impact this report are as follows:

Multiple responses are now accepted for the question "Who made the decision to come to PBC?". Also, the responses 'Female head of household', 'Male head of household' and 'Other traveling companion' were merged into 'Head of household/Other Adult', and the response 'Family living in PBC' was added as an option.

- The question "Which of the following influenced your trip to PBC?" (Question 3) was combined with the question "Why did you choose to visit PBC over other destinations?" (Question 5). Due to this change some of the closed-end answers were revised, added or excluded as follows:

- 'Work related trip – did not have a choice in destination' and 'Work related trip – I had a choice in selecting destination' became 'Work related trip'.
- 'Convenient/inexpensive flights' changed to 'Convenient Flights'
- 'Travel Agency recommendation' changed to 'Travel Agency'



Methodology

Hotel Visitor Survey

Survey changes (continued):

- 'Cultural Activities' (Question 3) was merged with 'Arts and Cultural Event' (Question 5).
 - 'PBC CVB literature' now reads 'Palm Beach County Convention and Visitors Bureau information/website'.
 - 'Hotel brochure' was changed to 'Hotel brochure/website'.
 - 'Attractions brochure' changed to 'Attractions brochure/website'.
 - 'Saw an advertisement/promotion/article' (Question 3), 'Newspaper or magazine article' (Question 5), 'Newspaper or magazine advertisement' (Question 5) were combined into 'Media Coverage'.
 - 'Sporting event (other than Spring Training)' (question 5) was replaced with 'Attend a sporting event'.
 - The answer 'Internet information' was replaced with 'other Internet sources'.
 - The answers 'Bus Tour' and 'Spanish language media' were added.
- Multiple responses are now accepted for the question "How did you get here?". Also, responses of Bus and Train were added to the list.
- Side trips have been excluded from computation of visitors expenditures (no longer asked on survey).
- In order to obtain a more accurate estimate of lodging expenditures, visitors are now asked directly how much they are paying for their hotel room instead of how much their party spent with lodging per day and in total. The amount spent with lodging per day is then calculated by multiplying room rate x number of rooms rented x 10.5% sales taxes.
- Two new questions were added: "What would make your next visit better?" and "To what extent if at all, might the rising cost of transportation, due to rising fuel costs, influence your decision whether or not to visit Palm Beach County?"



Methodology

Hotel Visitor Survey

Survey changes (continued):

- Changes to the question “Which of the following activities did you enjoy while staying in PBC?” were as follows:

- The closed-end responses swimming, snorkeling, surfing, kite surfing, and ‘visit Downtown at the Gardens’ were added.
- ‘Boating/fishing/diving’ are now presented individually and the answer ‘Other water activities’ was removed from the survey. Data from these two answers collected during October 2004 through September 2005 will be shown in all new related answers for comparison (i.e. prior responses of ‘boating/fishing/diving’ will now count toward the individual responses ‘boating’, ‘fishing’ and ‘diving’).
- The response ‘cruise’ was changed to ‘Gambling cruise’ and ‘Pari-mutuels (racing, jai-alai)’ changed to ‘Pari-mutuels (dog track)’.

- The answer ‘Palm Beach County Convention and Visitors Bureau’ was added to the list of websites visitors might use to book hotel rooms.

-Visitors are now asked if they are of Hispanic origin or descent and the answer ‘Hispanic’ was removed from the ethnic group question.

- Age categories “18 to 24” and “25 to 34” were merged into “Under 35” and categories “35 to 44” and “45 to 54” were combined into “35 to 54”.

- Household income ranges “Under \$25,000” and “\$25,000 to \$44,999” were merged into “Under \$45,000”.

- The household size question is no longer on the survey.



Hotel Survey: 1st Quarter 2008

Characteristics of Stay	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Average Party Size *	2.0	1.8	2.1	2.1	2.1	2.1	2.1	1.9
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.6	3.2	3.9	3.7	3.5	3.1	3.5	3.3
Nights in Hotel	3.5	3.1	3.7	3.6	3.3	3.0	3.4	3.2
Rooms per Night *	1.3	1.3	1.3	1.3	1.3	1.3	1.2	1.3

* Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.



Hotel Survey: 1st Quarter 2008

Visitor Expenditures	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Average Expenditure Per Visit								
Lodging	\$1,106	\$977	\$1,217	\$1,116	\$1,053	\$681	\$626	\$688
Restaurant/Bar	\$438	\$378	\$485	\$446	\$353	\$360	\$323	\$365
Gifts/Shopping	\$109	\$96	\$100	\$126	\$96	\$93	\$102	\$163
Entertainment/Recreation	\$42	\$25	\$52	\$40	\$63	\$45	\$37	\$26
Local Travel	\$158	\$152	\$155	\$158	\$142	\$123	\$126	\$141
Total Per Party	\$1,852	\$1,628	\$2,009	\$1,886	\$1,706	\$1,302	\$1,214	\$1,382
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$926	\$904	\$957	\$898	\$812	\$620	\$578	\$728
Total Per Person/Per Day	\$265	\$292	\$259	\$250	\$246	\$207	\$170	\$227
Lodging	\$158	\$175	\$157	\$148	\$152	\$108	\$88	\$113
Restaurant/Bar	\$63	\$68	\$62	\$59	\$51	\$57	\$45	\$60
Gifts/Shopping	\$16	\$17	\$13	\$17	\$14	\$15	\$14	\$27
Entertainment/Recreation	\$6	\$4	\$7	\$5	\$9	\$7	\$5	\$4
Local Travel	\$23	\$27	\$20	\$21	\$20	\$20	\$18	\$23

- Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.

+ Results may not be directly comparable to prior year due to availability of specific hotels at which interviewing was conducted.



Hotel Survey: 1st Quarter 2008

Visitor Expenditures	<u>Pleasure</u>							
	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
Average Expenditure Per Visit								
Lodging	\$1,364	\$983	\$1,536	\$1,532	\$1,333	\$816	\$647	\$799
Restaurant/Bar	\$594	\$398	\$691	\$639	\$484	\$403	\$330	\$490
Gifts/Shopping	\$230	\$176	\$226	\$277	\$197	\$158	\$119	\$288
Entertainment/Recreation	\$90	\$90	\$120	\$56	\$82	\$81	\$46	\$40
Local Travel	\$198	\$160	\$216	\$202	\$189	\$126	\$125	\$151
Total Per Party	\$2,475	\$1,806	\$2,789	\$2,707	\$2,284	\$1,582	\$1,267	\$1,768
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$952	\$752	\$1,033	\$1,083	\$913	\$586	\$469	\$769
Total Per Person/Per Day	\$212	\$193	\$215	\$230	\$223	\$167	\$142	\$213
Lodging	\$117	\$105	\$119	\$130	\$130	\$86	\$73	\$97
Restaurant/Bar	\$51	\$43	\$53	\$54	\$47	\$43	\$37	\$59
Gifts/Shopping	\$20	\$19	\$17	\$24	\$19	\$17	\$13	\$35
Entertainment/Recreation	\$8	\$10	\$9	\$5	\$8	\$9	\$5	\$5
Local Travel	\$17	\$17	\$17	\$17	\$18	\$13	\$14	\$18

- Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.

+ Results may not be directly comparable to prior year due to availability of specific hotels at which interviewing was conducted.



Hotel Survey: 1st Quarter 2008

Visitor Expenditures	<u>Business</u>							
	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
Average Expenditure Per Visit								
Lodging	\$902	\$995	\$938	\$794	\$888	\$558	\$602	\$630
Restaurant/Bar	\$339	\$371	\$339	\$311	\$280	\$313	\$311	\$300
Gifts/Shopping	\$50	\$78	\$34	\$43	\$42	\$48	\$73	\$105
Entertainment/Recreation	\$17	\$12	\$17	\$27	\$50	\$20	\$29	\$18
Local Travel	\$129	\$151	\$112	\$124	\$115	\$115	\$121	\$135
Total Per Party	\$1,436	\$1,607	\$1,439	\$1,299	\$1,375	\$1,053	\$1,137	\$1,188
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$898	\$1,004	\$900	\$764	\$764	\$619	\$693	\$743
Total Per Person/Per Day	\$321	\$346	\$321	\$283	\$273	\$248	\$199	\$248
Lodging	\$201	\$214	\$209	\$173	\$176	\$131	\$105	\$131
Restaurant/Bar	\$76	\$80	\$76	\$68	\$56	\$74	\$55	\$63
Gifts/Shopping	\$11	\$17	\$8	\$9	\$8	\$11	\$13	\$22
Entertainment/Recreation	\$4	\$3	\$4	\$6	\$10	\$5	\$5	\$4
Local Travel	\$29	\$33	\$25	\$27	\$23	\$27	\$21	\$28

- Starting in January 2002, if 'party size' is greater than 8 or if 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.

+ Results may not be directly comparable to prior year due to availability of specific hotels at which interviewing was conducted.



Hotel Survey: 1st Quarter 2008

Planning the Trip to Palm Beach County	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Reason for Trip								
Conference/Convention/ Business Meeting	62.5%	75.0%	54.7%	56.7%	55.1%	54.2%	51.1%	62.2%
- Business Meeting	51.2%	57.2%	50.7%	44.4%	49.1%	47.5%	44.4%	56.1%
- Conference/Convention	11.2%	17.8%	3.6%	12.3%	5.7%	6.2%	5.9%	5.7%
- Other Business	0.1%	0.0%	0.4%	0.0%	0.3%	0.5%	0.8%	0.4%
Vacation/Pleasure	32.7%	24.2%	38.8%	35.8%	34.9%	38.6%	37.5%	33.3%
Sporting Event	2.9%	0.0%	4.1%	4.6%	4.4%	1.8%	5.1%	1.0%
Cultural Event/Attraction	0.3%	0.0%	0.4%	0.3%	0.8%	1.3%	0.5%	0.3%
Film/TV location scouting/production	0.1%	0.0%	0.4%	0.0%	1.4%	0.0%	0.5%	0.1%
Other	1.6%	0.8%	1.7%	2.5%	3.4%	4.0%	5.4%	3.1%
Who Made the Decision*								
Employer	57.7%	71.0%	50.5%	51.3%	54.1%	49.6%	46.7%	57.7%
Head of Household/ Other adult	34.2%	23.3%	40.4%	39.8%	40.5%	41.3%	39.6%	34.5%
Family Living in PBC	7.9%	6.4%	8.8%	8.4%	6.8%	10.1%	11.0%	8.2%
Children Influenced Decision	1.0%	0.5%	0.7%	1.7%	0.8%	1.5%	4.7%	1.1%
Advanced Planning								
One Month or Less	53.0%	54.1%	56.7%	47.1%	52.1%	54.3%	60.0%	59.5%
2 to 3 Months	23.1%	24.1%	17.6%	27.7%	23.2%	21.8%	21.1%	21.1%
More than 3 Months	23.9%	21.9%	25.7%	25.2%	24.7%	23.9%	18.9%	19.4%

* Multiple responses accepted.



Hotel Survey: 1st Quarter 2008

Planning the Trip to Palm Beach County (Continued)	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	59.6%	71.1%	55.1%	52.4%	54.9%	51.6%	50.7%	59.8%
Visit Friends/Relatives	19.6%	16.3%	22.8%	19.5%	19.5%	22.8%	21.1%	22.1%
Previous Visit	15.1%	9.8%	19.6%	17.1%	14.2%	11.9%	9.8%	11.7%
Weather	6.1%	6.6%	5.4%	6.5%	9.3%	6.0%	5.9%	5.4%
Convenient Flights	5.9%	4.4%	8.4%	4.9%	8.9%	5.6%	5.4%	7.3%
Special Event	5.7%	3.4%	6.7%	6.3%	7.4%	7.5%	7.6%	6.8%
Beaches	4.6%	6.0%	4.4%	3.7%	7.5%	5.4%	8.1%	3.6%
Golf/Tennis/Recreation	3.8%	2.7%	5.8%	3.7%	3.3%	2.8%	1.8%	1.8%
Friends/Relatives recommendation	2.8%	2.6%	3.3%	2.5%	3.2%	2.3%	3.5%	2.3%
Spring Training	1.6%	0.0%	0.0%	4.2%	2.4%	0.0%	0.0%	0.0%
Attend Sporting Event	1.0%	0.0%	1.2%	1.6%	2.0%	0.7%	2.5%	0.3%
Hotel Brochure/Website	0.7%	1.4%	0.0%	0.8%	2.2%	1.3%	2.1%	1.2%
Compete in Sporting Event	0.7%	0.0%	0.0%	2.1%	1.4%	1.4%	1.2%	0.7%
Art/Cultural Event	0.4%	0.5%	0.4%	0.4%	0.9%	1.1%	0.5%	0.3%
Travel Agency	0.4%	0.5%	0.9%	0.0%	0.1%	0.1%	0.0%	0.0%
PBC-CVB Information/Website	0.3%	0.5%	0.0%	0.4%	0.1%	1.1%	0.1%	0.1%
Attraction Brochure/Website	0.3%	0.5%	0.4%	0.0%	0.7%	1.1%	2.2%	1.0%
Other Internet Sources	0.1%	0.0%	0.0%	0.4%	0.5%	0.3%	0.7%	0.4%
County/State Tourist Agency	0.1%	0.0%	0.4%	0.0%	0.1%	0.1%	0.1%	0.0%
Spanish Language Media	0.1%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Media Coverage	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	0.0%
Bus Tour	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%
Other	3.9%	2.4%	4.5%	5.0%	3.0%	6.6%	6.3%	4.3%

* Multiple responses accepted.



Hotel Survey: 1st Quarter 2008

Booking Tools	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
<u>Booked Trip with Travel Agency</u>								
Yes	21.4%	24.9%	20.4%	18.9%	23.7%	24.5%	21.2%	25.0%
No	78.6%	75.1%	79.6%	81.1%	76.3%	75.5%	78.8%	75.0%
<u>Booked Any Part of Trip Using Internet</u>								
Yes	44.5%	43.3%	42.1%	49.5%	44.9%	48.8%	51.2%	51.1%
No	55.5%	56.7%	57.9%	50.5%	55.1%	51.2%	48.8%	48.9%
<u>Booked Any Part of Trip Using Internet*</u> (among those who used the Internet)								
Air	70.7%	61.5%	73.2%	77.4%	76.1%	62.4%	66.3%	69.9%
Hotel	64.7%	55.8%	69.6%	67.8%	64.8%	73.8%	75.6%	77.7%
Hotel website	32.9%	28.9%	35.4%	34.0%	28.4%	38.2%	39.2%	35.1%
Expedia	4.1%	5.5%	7.1%	0.9%	2.5%	3.1%	4.5%	6.3%
Travelocity	1.6%	3.1%	0.0%	1.9%	2.2%	4.1%	3.4%	6.0%
Orbitz	1.0%	1.3%	0.8%	0.9%	1.2%	0.9%	1.7%	2.0%
hotels.com	1.0%	1.1%	0.8%	0.9%	1.8%	3.1%	2.5%	1.3%
Hotwire	2.0%	2.2%	3.0%	0.8%	1.3%	1.1%	1.2%	1.3%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Website	6.6%	4.5%	6.6%	8.0%	6.9%	5.5%	7.0%	10.7%
Don't Remember	16.4%	11.4%	15.8%	21.3%	20.4%	17.9%	16.3%	17.7%
Car Rental	37.8%	32.8%	46.6%	34.0%	41.7%	40.1%	33.6%	40.0%
Tickets to Event	1.1%	1.1%	0.0%	2.0%	0.5%	2.3%	1.5%	0.8%
Other	5.7%	13.3%	2.0%	1.8%	4.4%	1.8%	0.9%	0.6%
<u>Visit was Part of Package</u> (that may have included airfare, lodging, meals, rental car, etc.)								
Yes	3.7%	3.6%	1.9%	5.9%	7.2%	8.0%	3.8%	4.1%
No	96.3%	96.4%	98.1%	94.1%	92.8%	92.0%	96.2%	95.9%

* Multiple responses accepted.



Hotel Survey: 1st Quarter 2008

Activity Participation	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Participation in Specific Activities*								
Restaurants	95.5%	95.3%	95.1%	96.2%	93.4%	93.7%	92.6%	93.7%
Shopping	31.1%	34.0%	30.4%	30.5%	33.1%	32.1%	32.8%	31.2%
Went to Beach	25.6%	24.4%	24.5%	28.5%	26.7%	31.8%	29.9%	23.2%
Golf, Tennis	12.6%	15.0%	14.0%	9.3%	11.8%	9.1%	7.1%	3.8%
Swimming	11.3%	9.6%	13.8%	11.1%	13.2%	18.0%	19.4%	12.5%
Visited downtown West Palm Beach Attractions/City Place	8.9%	8.4%	8.8%	10.3%	11.5%	11.5%	8.8%	9.2%
Bars/Nightclubs	8.2%	10.2%	5.5%	9.1%	14.0%	10.9%	12.4%	12.3%
Visited Mizner Park/Boca Raton	7.3%	5.8%	8.7%	7.5%	4.5%	5.1%	4.0%	5.4%
Visited Downtown Delray Beach Attractions	5.3%	3.4%	6.8%	6.0%	7.7%	3.3%	4.5%	5.8%
Visited Wildlife Refuge	4.1%	3.5%	4.2%	4.8%	2.9%	2.5%	2.6%	2.4%
Museums, Art Galleries	4.1%	3.2%	3.1%	6.4%	4.3%	2.0%	1.4%	1.3%
Attended a Sporting Event	3.5%	0.7%	1.2%	8.2%	4.4%	1.3%	1.3%	1.5%
Visited Palm Beach/Worth Avenue**	3.3%	1.4%	4.0%	5.0%	N/A	N/A	1.0%	2.8%
Visited Downtown at the Gardens	2.8%	3.3%	1.3%	3.5%	1.6%	2.1%	1.8%	1.7%
Attractions, Tours, Zoo	2.8%	2.3%	4.6%	1.7%	2.3%	2.1%	1.6%	1.2%
Boating	1.8%	1.9%	2.8%	0.9%	1.9%	2.6%	2.0%	1.2%
Visited Riviera Beach/Singer Island	1.4%	1.2%	1.8%	1.3%	1.0%	0.7%	0.9%	0.3%
Fishing	1.3%	2.1%	0.8%	1.2%	1.5%	1.3%	1.7%	1.1%
Horse Related Activities+	1.2%	0.8%	0.9%	2.4%	N/A	N/A	N/A	N/A
Performing Arts (plays, concerts, dance)	1.1%	1.2%	1.5%	0.4%	0.9%	1.5%	1.4%	1.3%
Visited downtown Lake Worth	1.0%	0.8%	1.7%	0.4%	1.6%	0.6%	0.7%	1.0%
Gambling Cruise	0.7%	1.0%	0.9%	0.4%	0.3%	1.1%	1.3%	0.6%
Competed in Sports Event	0.3%	0.0%	0.0%	0.8%	0.6%	0.8%	0.6%	0.4%
Diving	0.1%	0.5%	0.0%	0.0%	0.3%	0.6%	0.6%	0.7%
Pari-mutuels (dog-track)	0.1%	0.5%	0.0%	0.0%	0.3%	0.2%	0.2%	0.5%
Kite Surfing	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Surfing	0.1%	0.0%	0.4%	0.0%	0.4%	0.1%	0.1%	0.1%
Snorkeling	0.0%	0.0%	0.0%	0.0%	0.3%	1.3%	1.9%	0.9%
Palm Beach County Convention Center	0.0%	0.0%	0.0%	0.0%	0.3%	0.9%	0.1%	0.3%
Other	10.3%	8.4%	8.1%	15.0%	5.5%	5.7%	6.3%	10.1%

*Multiple responses accepted.

** Added in August 2007

+Added in January 2008



Hotel Survey: 1st Quarter 2008

Return Visits	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Plan to Return to PBC								
Yes	83.0%	84.1%	85.2%	80.2%	84.5%	83.8%	87.2%	84.3%
No	2.6%	3.0%	2.5%	2.1%	2.5%	2.6%	1.4%	3.0%
Don't know	14.4%	12.9%	12.4%	17.7%	13.0%	13.6%	11.4%	12.6%
If no, why not?* (Top mentions – 4% or higher)								
	n = 19	n = 8**	n = 6**	n = 5**	n = 19	n = 19	n = 10	n = 22
No business in the area	20.3%	1	2	1	20.0%	16.3%	28.9%	30.8%
Too expensive	10.5%	0	1	1	0.0%	14.9%	0.0%	4.4%
Prefer other destinations	10.3%	2	0	0	0.0%	0.0%	0.0%	0.0%
Too far	5.3%	0	1	0	6.1%	0.0%	0.0%	14.0%
Too crowded	5.3%	1	0	0	0.0%	5.2%	0.0%	0.0%
Have not been invited to come back	5.2%	0	0	1	0.0%	0.0%	0.0%	0.0%
No reason/No answer	43.1%	4	2	2	38.5%	32.0%	38.2%	38.3%
When do you plan on returning to PBC?								
Within the next 3 months	30.2%	31.0%	37.2%	21.0%	29.7%	34.4%	36.0%	36.3%
Within the next 6 months	11.4%	11.3%	10.3%	12.9%	10.3%	12.3%	11.2%	8.7%
Within the next year	31.9%	26.3%	32.7%	39.0%	29.7%	26.1%	21.2%	19.6%
Within the next few years	3.0%	4.1%	2.4%	2.2%	6.1%	5.0%	4.6%	7.4%
Don't Know	23.5%	27.3%	17.3%	25.0%	24.2%	22.1%	27.1%	28.0%

*Multiple responses accepted.

** Raw numbers shown due to low base size



Hotel Survey: 1st Quarter 2008

Travel Details	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
<u>Main Destination</u>								
Palm Beach County	92.1%	89.8%	94.0%	93.2%	89.0%	87.4%	91.0%	91.8%
<u>First Trip to PBC</u>	26.2%	29.3%	19.8%	28.9%	19.8%	24.3%	25.3%	26.2%
<u>Type of Transportation*</u>								
Airplane	82.5%	88.6%	78.9%	80.9%	80.2%	72.2%	65.1%	75.9%
Car	22.7%	15.9%	23.6%	27.6%	24.5%	33.4%	38.9%	29.7%
Other	0.5%	0.0%	0.0%	1.5%	1.3%	0.7%	0.4%	0.2%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2008

Attitudes about Trip to Palm Beach County	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Things Liked Best – Top Mentions								
Climate/Weather	52.4%	53.0%	54.0%	50.9%	48.9%	36.9%	25.9%	42.5%
Beaches/Ocean	8.6%	7.5%	5.6%	12.3%	10.8%	13.5%	17.7%	12.2%
Beautiful Area/Nice Place	4.9%	5.4%	5.8%	5.0%	6.8%	8.4%	10.1%	5.5%
Visiting Family/Friends	4.0%	3.0%	5.0%	3.6%	2.9%	5.0%	4.2%	5.4%
Relaxing Atmosphere	3.6%	4.1%	2.9%	4.2%	3.6%	2.6%	3.0%	4.3%
Cleanliness	3.6%	4.4%	2.1%	4.2%	2.4%	4.5%	3.7%	3.1%
Nice People	3.4%	3.8%	2.6%	3.9%	4.0%	4.5%	5.9%	4.7%
Restaurant	2.4%	1.0%	3.8%	1.8%	2.6%	2.2%	2.8%	2.2%
Hotel	2.0%	1.0%	3.5%	1.3%	1.9%	3.6%	3.9%	1.6%
Golf	1.7%	1.3%	3.9%	0.0%	3.3%	1.4%	1.2%	0.5%
Palm Trees	1.6%	2.8%	0.4%	1.3%	0.6%	1.8%	2.7%	0.9%
Location	1.2%	1.4%	1.8%	0.5%	0.7%	1.8%	1.8%	3.3%
Shopping	1.1%	2.1%	0.8%	0.5%	1.5%	1.5%	2.5%	1.9%
Everything	0.3%	0.0%	0.8%	0.0%	1.9%	3.0%	1.6%	1.8%
Other	10.0%	9.2%	7.2%	10.7%	7.1%	7.3%	10.5%	8.2%



Hotel Survey: 1st Quarter 2008

Attitudes about Trip to Palm Beach County	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Things Liked Least – Top Mentions								
Traffic/Bad Drivers	35.4%	41.3%	35.6%	30.0%	41.6%	33.4%	26.7%	34.2%
Humidity/Poor Weather	10.2%	8.8%	11.9%	10.2%	9.6%	15.3%	25.1%	14.2%
Expensive	8.0%	8.0%	8.1%	9.5%	5.8%	6.8%	6.1%	3.5%
Road Construction	5.2%	6.2%	3.7%	5.4%	2.8%	3.7%	5.3%	3.6%
Stay Was Too Short	3.8%	2.9%	4.7%	3.5%	1.6%	1.6%	2.2%	2.5%
Crowded	3.6%	3.2%	2.8%	4.9%	3.6%	3.4%	1.0%	5.1%
Hotel (general)	2.6%	1.3%	3.8%	2.4%	1.6%	2.8%	2.1%	1.4%
Bad neighborhoods/crime	1.8%	0.0%	0.0%	5.0%	0.0%	1.0%	3.2%	2.5%
Too spread out	1.6%	1.9%	2.2%	1.0%	0.0%	0.3%	0.0%	0.0%
Cost of Hotel	1.4%	1.9%	1.9%	0.0%	2.2%	0.6%	0.3%	0.3%
Lack of directional signs	0.6%	1.9%	0.0%	0.0%	0.3%	0.0%	2.0%	1.2%
Bugs/Lizards	0.5%	0.0%	0.7%	1.0%	0.6%	2.1%	1.5%	0.0%
Other	20.3%	19.4%	18.1%	19.1%	19.1%	20.8%	15.9%	22.5%
Nothing liked least	6.0%	5.1%	6.5%	5.8%	11.2%	8.2%	8.6%	9.0%



Hotel Survey: 1st Quarter 2008

Attitudes about Trip to Palm Beach County	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Suggestions for Improvement - Top Mentions*								
Longer stay	21.2%	13.4%	27.0%	21.1%	22.3%	20.3%	22.2%	21.2%
Better weather	9.4%	7.8%	9.1%	12.3%	13.7%	11.1%	11.9%	9.4%
Improve traffic/Finish Construction on I-95	8.4%	11.7%	9.1%	4.9%	7.1%	7.8%	6.0%	9.2%
Come with friends/family	8.2%	14.1%	4.0%	8.1%	6.2%	3.2%	3.5%	4.5%
Come during vacation time/Time off work	7.9%	8.2%	7.7%	6.1%	6.9%	2.3%	8.6%	5.3%
Better hotel	6.8%	5.5%	9.4%	4.7%	4.1%	3.7%	2.0%	1.6%
Less business and more partying/more free time	5.2%	5.1%	5.0%	5.5%	3.0%	10.7%	4.8%	9.7%
Lower prices	4.7%	3.4%	2.2%	9.1%	2.9%	2.4%	2.0%	2.2%
Cheaper hotel room	2.8%	4.2%	1.9%	2.4%	2.9%	3.3%	3.1%	1.7%
Better transportation/ transportation options	2.4%	3.7%	1.1%	2.2%	0.8%	1.4%	2.4%	0.6%
More flights/More direct flights	0.4%	1.0%	0.0%	0.0%	0.3%	0.5%	1.0%	3.0%
Nothing	4.9%	6.4%	5.7%	2.2%	7.6%	7.9%	4.5%	7.1%
Other	21.1%	24.0%	19.1%	25.2%	21.7%	25.9%	30.6%	25.1%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2008

Characteristics of Visitors	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Age								
Under 35	13.0%	14.5%	13.0%	10.8%	15.6%	16.1%	20.5%	15.6%
35 to 54	56.3%	57.2%	55.1%	56.4%	51.6%	55.0%	55.3%	53.7%
55 to 64	19.6%	19.1%	19.0%	21.4%	21.8%	21.1%	18.7%	23.9%
65 +	11.1%	9.1%	12.9%	11.4%	11.0%	7.8%	5.5%	6.9%
Occupation								
Professional/Managerial	63.4%	64.5%	62.8%	62.8%	63.5%	63.7%	63.7%	58.8%
Sales	12.4%	13.4%	12.2%	11.9%	14.7%	16.5%	13.5%	15.9%
Retired	12.3%	11.2%	13.1%	13.2%	10.8%	9.3%	7.7%	9.5%
Technical	7.4%	6.3%	5.7%	9.3%	5.8%	5.3%	7.4%	7.8%
Student	0.5%	0.5%	0.9%	0.4%	1.0%	0.6%	2.0%	1.4%
Other	3.9%	4.2%	5.4%	2.3%	4.1%	4.7%	6.1%	6.5%
Hispanic Origin	4.3%	8.2%	3.0%	2.3%	4.0%	5.7%	6.6%	5.6%
Ethnicity								
White/Caucasian	93.8%	91.3%	98.1%	92.0%	92.9%	91.4%	92.9%	92.4%
African-American/Black	3.3%	4.6%	1.0%	4.1%	5.2%	5.9%	5.3%	4.5%
Asian	2.8%	3.7%	0.8%	4.0%	1.8%	2.8%	1.5%	2.8%
Other	0.1%	0.4%	0.0%	0.0%	0.2%	0.0%	0.3%	0.3%



Hotel Survey: 1st Quarter 2008

Characteristics of Visitors (Continued)	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
<u>Income</u>								
Under \$45,000	1.2%	0.9%	1.7%	0.9%	4.5%	5.5%	5.6%	3.1%
\$45,000 to \$64,999	4.7%	3.9%	5.1%	4.5%	6.2%	9.8%	9.9%	9.3%
\$65,000 to \$99,999	18.8%	18.5%	14.9%	22.2%	21.9%	19.2%	23.8%	23.2%
\$100,000 to \$200,000	44.2%	47.6%	43.0%	41.6%	39.8%	42.3%	41.3%	38.9%
Over \$200,000	31.0%	29.1%	35.3%	30.8%	27.5%	23.2%	19.4%	25.5%
<u>Description of Travel Party*</u>								
Self Only	36.4%	42.2%	36.5%	29.1%	31.6%	30.8%	34.7%	42.5%
Adult family members or friends	39.3%	27.9%	42.4%	49.1%	41.6%	44.9%	46.9%	34.7%
Business Associates	22.8%	28.1%	19.4%	21.1%	26.5%	23.1%	16.7%	21.9%
Children <12 years of age	6.3%	4.9%	9.0%	5.3%	7.7%	8.7%	10.1%	3.8%
Grandchildren <12 years of age	0.0%	0.0%	0.0%	0.0%	0.2%	0.5%	0.4%	0.3%
<u>Gender</u>								
Male	59.4%	60.9%	63.1%	55.2%	56.3%	59.7%	59.2%	60.9%
Female	40.6%	39.1%	36.9%	44.8%	43.7%	40.3%	40.8%	39.1%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2008

<u>Description of Travel Party*</u>	Pleasure Hotel Guests							
	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
Adult family members or friends	84.6%	75.0%	86.3%	89.8%	83.7%	83.8%	84.2%	79.1%
Self Only	10.7%	18.7%	7.9%	8.2%	11.4%	9.2%	9.8%	17.9%
Children under 12 years of age	15.9%	19.7%	18.0%	12.1%	15.8%	16.2%	19.7%	7.6%
Business Associates	0.8%	0.0%	2.0%	0.0%	4.0%	3.7%	2.1%	1.0%
Grandchildren under 12 years of age	0.0%	0.0%	0.0%	0.0%	0.6%	1.0%	0.9%	0.7%

<u>Description of Travel Party*</u>	Business Hotel Guests							
	<u>Total 1Q 2008</u>	<u>Jan.</u>	<u>Feb</u>	<u>Mar.</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>	<u>Total 3Q 2007</u>	<u>Total 4Q 2007</u>
Self Only	50.9%	49.4%	59.1%	44.4%	47.2%	47.7%	56.0%	56.6%
Business Associates	35.1%	36.6%	33.1%	36.3%	43.2%	38.9%	30.1%	33.9%
Adult family members or friends	13.8%	13.5%	7.8%	19.2%	9.7%	13.7%	14.2%	9.3%
Children under 12 years of age	1.0%	0.5%	2.0%	0.7%	1.4%	2.8%	1.9%	1.6%
Grandchildren under 12 years of age	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2008

Place of Origin	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
<u>Domestic</u>	91.2% (n=669)	90.5%	90.9%	92.1%	91.2% (n=664)	90.9% (n=667)	91.3% (n=674)	88.1% (n=648)
Midwest	18.7% (n=137)	23.0%	13.6%	19.5%	16.9% (n=123)	12.4% (n=91)	12.4% (n=91)	11.2% (n=82)
Southeast	17.3% (n=127)	19.0%	16.9%	17.1%	17.6% (n=128)	16.0% (n=118)	16.2% (n=120)	15.4% (n=113)
Mid Atlantic	15.3% (n=112)	12.0%	15.5%	18.3%	15.2% (n=111)	14.3% (n=105)	13.5% (n=100)	12.3% (n=91)
New York	12.8% (n=94)	11.2%	16.1%	11.4%	9.4% (n=69)	9.3% (n=69)	7.8% (n=57)	10.4% (n=77)
Florida	12.3% (n=91)	10.8%	15.0%	10.5%	16.4% (n=120)	24.4% (n=179)	30.7% (n=227)	22.2% (n=163)
Far West	7.6% (n=56)	8.8%	7.5%	6.0%	6.6% (n=48)	7.6% (n=56)	5.2% (n=38)	7.2% (n=53)
New England	7.1% (n=52)	5.7%	6.3%	9.3%	9.2% (n=67)	6.9% (n=51)	5.5% (n=41)	9.4% (n=69)
<u>International</u>	8.8% (n=65)	9.5%	9.1%	7.9%	8.8% (n=64)	9.1% (n=67)	8.7% (n=64)	11.9% (n=87)
Europe (net)	3.4% (n=25)	4.2%	4.1%	2.0%	3.7% (n=27)	4.6% (n=34)	3.0% (n=22)	6.6% (n=48)
- England/UK	1.4% (n=10)	1.2%	1.6%	1.3%	1.6% (n=12)	1.8% (n=13)	1.0% (n=7)	3.7% (n=27)
- Germany	0.3% (n=2)	0.8%	0.0%	0.0%	1.0% (n=7)	0.4% (n=3)	0.1% (n=1)	0.8% (n=6)
Canada	3.2% (n=24)	3.3%	2.6%	3.9%	2.7% (n=20)	1.4% (n=10)	1.0% (n=8)	2.0% (n=15)
Latin America / Caribbean	1.3% (n=9)	1.7%	1.6%	0.5%	1.9% (n=14)	2.0% (n=15)	3.5% (n=26)	2.1% (n=15)
Australia/Asia	0.8% (n=6)	0.3%	0.4%	1.5%	0.4% (n=3)	0.6% (n=5)	0.8% (n=6)	0.8% (n=6)
Middle East	0.1% (n=1)	0.0%	0.3%	0.0%	0.0% (n=0)	0.0% (n=0)	0.3% (n=2)	0.4% (n=3)
Africa	0.0% (n=0)	0.0%	0.0%	0.0%	0.0% (n=0)	0.4% (n=3)	0.0% (n=0)	0.0% (n=0)



Hotel Survey: 1st Quarter 2008

Pleasure Vs. Business By Selected Place of Origin	Total 1Q 2008	Jan.	Feb	Mar.	Total 1Q 2007	Total 2Q 2007	Total 3Q 2007	Total 4Q 2007
Midwest	18.7%	23.0%	13.6%	19.5%	16.9%	12.4%	12.4%	11.2%
Business	12.0%	16.8%	8.6%	10.2%	9.6%	7.5%	6.1%	7.1%
Pleasure	6.8%	6.1%	5.3%	9.0%	6.9%	4.8%	6.4%	3.8%
Southeast	17.3%	19.0%	16.9%	17.1%	17.6%	16.0%	16.2%	15.4%
Business	13.4%	17.2%	12.7%	11.4%	12.1%	10.8%	10.2%	12.9%
Pleasure	4.0%	1.6%	4.5%	5.7%	5.1%	5.3%	6.1%	2.4%
Mid Atlantic	15.3%	12.0%	15.5%	18.3%	15.2%	14.3%	13.5%	12.3%
Business	7.1%	8.6%	5.3%	6.5%	7.1%	6.1%	5.0%	6.7%
Pleasure	8.0%	3.3%	10.2%	11.0%	7.6%	8.0%	8.4%	5.6%
New York	12.8%	11.2%	16.1%	11.4%	9.4%	9.3%	7.8%	10.4%
Business	6.1%	7.8%	5.7%	4.5%	3.6%	3.1%	2.4%	4.9%
Pleasure	6.5%	3.3%	10.6%	6.5%	5.8%	6.1%	5.3%	5.6%
Florida	12.3%	10.8%	15.0%	10.5%	16.4%	24.4%	30.7%	22.2%
Business	9.5%	8.6%	10.6%	9.0%	10.2%	13.6%	18.8%	14.6%
Pleasure	2.9%	2.0%	4.5%	1.6%	6.0%	10.3%	11.2%	7.6%
Far West	7.6%	8.8%	7.5%	6.0%	6.6%	7.6%	5.2%	7.2%
Business	5.6%	5.7%	5.7%	4.9%	4.1%	5.0%	1.4%	4.2%
Pleasure	2.0%	2.9%	2.0%	1.2%	2.5%	2.5%	3.8%	3.0%
New England	7.1%	5.7%	6.3%	9.3%	9.2%	6.9%	5.5%	9.4%
Business	4.0%	4.0%	2.9%	4.9%	4.7%	3.1%	2.8%	4.8%
Pleasure	3.0%	1.6%	3.3%	4.1%	4.5%	3.7%	2.6%	4.6%