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Report on Palm Beach County Tourism
First Quarter 2009
(January, February, and March)

Prepared for:
Tourist Development Council of Palm Beach County

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May 13, 2009

Introduction: 1st Quarter 2009

Background

- **The following report contains information collected during the 1st Quarter of 2009 (January, February and March), second quarter of Fiscal Year 2008/2009.**
- **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 2009

Occupancy Rates

- **During the first quarter of 2009, the average occupancy rate for responding Palm Beach County hotels was 69.2%. This was 11.4 percentage points higher than last quarter (57.8%), yet 9.7 percentage points lower than 1Q2008 (78.9%).**
  - The average occupancy rate among larger (101+ rooms) and smaller (50-100 rooms) properties was 70.1% and 64.8%*, respectively.
  - The average occupancy rate for smaller hotels (50-100 rooms) increased by 13.7 percentage points compared with last quarter (from 51.1% in 4Q2008 to 64.8% in 1Q2009), but decreased by 9.7 percentage points compared with this time last year (from 74.5% in 1Q2008 to 64.8% in 1Q2009).
  - The average occupancy rate for larger hotels (101+ rooms) increased by 11.0 percentage points compared with last quarter (from 59.1% in 4Q2008 to 70.1% in 1Q2009), but decreased by 9.5 percentage points compared with this time last year (from 79.6% in 1Q2008 to 70.1% in 1Q2009).
- **Properties in the Central region of Palm Beach County experienced the highest average occupancy rate (75.0%) among the three regions (Northern – 66.9% and Southern – 64.8%).**
  - Hotels in the all regions experienced increases in the average occupancy rate relative to last quarter (Central – up 13.8 percentage points from 61.2%; North – up 15.5 percentage points from 51.4%; South – up 7.4 percentage points from 57.4%).
  - Compared to the same quarter last year, the average occupancy rate decreased among properties in all three regions (North – an 11.6 percentage point decrease from 78.5%, Central – an 8.4 percentage point decrease from 83.4%, South – a 9.9 percentage point decrease from 74.7%).
- **During the first quarter of 2009 the approximate number of hotel room nights occupied** was 923,953 – an increase of 140,541 room nights relative to 4Q2008 (783,412), but a decrease of 126,652 room nights compared to 1Q2008 (1,050,605).**
- **According to participating hotel managers in 1Q2009, 5.5% of hotel guests traveled internationally. This was at parity with 4Q2008 (5.4%) and 1Q2008 (5.5%).**
  - Property managers from smaller hotels (50-100 rooms) stated that, on average, 4.0% of their guests traveled from outside of the United States, while those managers from larger properties (101+ rooms) claimed that, on average, 5.5% of their guests were international travelers.
  - During the first quarter of 2009, hotels in the Central region of Palm Beach County experienced the highest percentage of guests traveling internationally (6.2%). Property managers in the Northern and Southern regions reported that 4.0% and 5.1% of their guests, respectively, were international travelers.

* Please note that the response rate for hotels with 50-100 rooms was low in January (36.4%), February (32.6%) and March (35.7%).
** Properties well below 50 rooms are only included in room count and total inventory.

Property Manager Survey: 1st Quarter 2009

Occupancy Rates (cont.'d)

- **During 1Q2009, leisure travelers occupied the greatest percentage of room nights in Palm Beach County (42.3%), followed by business travelers (32.9%). Convention/group travelers occupied 24.8% of 1Q2009 hotel room nights.**
- **Hotel managers from convention hotels stated that 26.6% of their reservations were made by convention/group travelers; at parity with 4Q2008 (29.1%) and a 5.1 percentage point decrease relative to 1Q2008 (31.7%).**

Average Daily Room Rate (ADR)

- **As reported by participating Palm Beach County property managers, the ADR for PBC properties in 1Q2009 was $188.55 – this represents a 25% ($37.95) increase compared to 4Q2008 ($150.60), but was an 18.8% ($43.59) decrease compared with 1Q2008 ($232.14).**
  - Hotel managers of smaller properties (50-100 rooms)* reported an increase in their ADR compared to last quarter (up 32.3 percentage points, from $142.22 in 4Q2008 to $188.13 in 1Q2009); however, they cited a decrease in ADR relative to the same quarter last year (down 26.5 percentage points, from $255.89 in 1Q2008 to $188.13 in 1Q2009). Managers of larger properties (101+ rooms) stated an increase in their ADR compared to last quarter (up 23.8 percentage points, from $152.88 in 4Q2008 to $189.30 in 1Q2009); however, they also cited a decrease relative to the same quarter last year (down 17.5 percentage points, from $229.51 in 1Q2008 to $189.30 in 1Q2009).
  - During the first quarter of 2009, managers at hotels with 101-219 rooms reported an ADR of $137.27 (a 27.7 percentage point increase from 4Q2008, $107.49). Hotels with 220-500 rooms cited an ADR of $183.66 (a 17.0 percentage point increase from 4Q2008, $156.92). Hotels with 101-219 rooms experienced a 14.3 percentage point decrease in their ADR compared to the same quarter last year ($160.13), while hotels with 220-500 rooms experienced a 26.3 percentage point decrease in their ADR compared to the same quarter last year ($249.30).

Future Business Outlook

- **Regarding the business outlook for the next two months as relative to the same months last year, nearly nine-in-ten responding hotel managers expected a decrease in total room revenue (87.8% Total; 83.8% Group/Individual Business, 83.7% Individual Vacation). Few surveyed hotel managers anticipated an increase (1.8% Total; 5.5% Group/Individual Business, 6.4% Individual Vacation), while the remaining responding hotel managers anticipated no change (10.4% Total; 10.7% Group/Individual Business, 9.9% Individual Vacation) in future business outlook compared to the same months last year.***
  - Among hotel managers who expected an increase in room revenue compared to the previous year, the average increase projected was 12.0% (28.8%** - Group/Individual Business, 20.2%** - Individual Vacation).*
  - Among hotel managers who anticipated a decrease in room revenue relative to the past year, the average decrease predicted was 19.0% (19.0%** - Group/Individual Business, 18.3%** - Individual Vacation).*

* Based on those responding for each (total, group/individual business, individual vacation)
** Caution: Extremely low base

Property Manager Survey: 1st Quarter 2009

Future Business Outlook (cont.'d)

- **When predicting changes in room revenue for the following third and fourth months compared to the same months last year, 81.9% of responding hotel managers were expecting a decrease in total revenue (77.0% Group/Individual Business, 78.3% Individual Vacation). 6.3% of surveyed managers expected an increase in total room revenue (7.8% Group/Individual Business, 7.4% Individual Vacation) and about one-in-ten (11.8%) predicted no change in total room revenue (15.2% Group/Individual Business, 14.3% Individual Vacation).***
  - Among hotel managers who anticipated an increase in room revenue relative to the previous year, the average increase forecasted was 11.6% (17.7%** - Group/Individual Business, 13.5%** - Individual Vacation).*
  - Among hotel managers who expected a decrease in room revenue compared to the prior year, the average decrease predicted was 17.8% (18.9% - Group/Individual Business, 17.9% - Individual Vacation).*

Bookings Via Third Party Websites

- **During 1Q2008 an average of 15.1% of Palm Beach County hotel bookings were made through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc.). This was at parity with both 4Q2008 (15.9%) and 1Q2008 (14.5%).**
  - In prior quarters, the majority of third party bookings have been at smaller hotels (50-100 rooms); in 1Q2009 however, there were more third party bookings at larger hotels (100+ rooms; 14.5%) than at smaller hotels (50-100 rooms; 11.9%).

Market Focus

- **As in prior quarters, the major focus for hotel managers, in terms of marketing, advertising and promotion, during the first quarter of 2009 was on the Florida Leisure Drive Market (77.0%).**
- **When asked about the greatest challenges for the remainder of 2009, responding hotel managers most often mentioned the economy in general. A full, detailed list can be found on pages 23 and 24**.

* Based on those responding for each (total, group/individual business, individual vacation)
** Caution: Extremely low base

Hotel Visitor Survey: 1st Quarter 2009

Characteristics of Stay

- **During the first quarter of 2009, the average party size of surveyed hotel visitors was 1.9*, while the median party size was 2.0, as was the case for all months within the quarter, as well as last quarter and last year.**
- **On average, 1Q2009 surveyed hotel guests spent 3.9 nights in a hotel, which was an increase compared with last year (3.5) and last quarter (3.7). Surveyed hotel guests occupied an average of 1.2 rooms per night*.**

Planning the Trip to Palm Beach County

- **Throughout 1Q2009, more than one-half of surveyed hotel guests (52.7%) were in Palm Beach County on a business trip (conference/convention/business meeting). Nearly one-half were in town specifically for a business meeting (47.4%). Guests traveling for vacation made up more than one-third of surveyed guests (38.7%).**
  - Compared to last quarter, the percentage of Palm Beach County vacation travelers in 1Q2009 increased while the percentage of business travelers decreased. Leisure travelers increased by 5.1 percentage points, from 33.6% in 4Q2008 to 38.7% in 1Q2009, while business travelers decreased by 7.5 percentage points, from 60.2% in 4Q2008 to 52.7% in 1Q2009.
- **'Work Related Trip' was the reason approximately one-half of surveyed hotel visitors selected Palm Beach County instead of another destination (50.6%). 'Visit Friends/Relatives' (26.1%) and/or 'Previous Visit' (19.1%) were other responses frequently cited by guests.**
  - Citing of 'Work Related Trip' as a reason for selecting PBC over other destinations decreased by 8.1 percentage points compared to last quarter (58.7%) and decreased by 9.0 percentage points relative to 1Q2008 (59.6%).
- **In the first quarter of 2009, one-half of participating hotel guests cited 'Employer' as the decision maker regarding the trip to Palm Beach County (50.4%). More than forty percent claimed their decision was made by the 'Head of Household/Other adult' (44.8%).**
  - The percentage of visitors citing 'Employer' as the decision maker in the first quarter of 2009 (50.4%) decreased by 7.3 percentage points in comparison to the first quarter of 2008 (57.7%). The percentage of visitors citing 'Head of Household/Other adult' as the decision maker regarding the trip to Palm Beach County (44.8%) increased by 10.4 percentage points in comparison to the first quarter of 2008 (34.2%).
- **More than one-half of 1Q2009 surveyed hotel guests in PBC planned their trip one month or less in advance (54.3%), which was at relative parity with last quarter (56.3%) and the same quarter last year (53.0%).**

* 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 2009

Booking a Trip to Palm Beach County

- **Nearly one-quarter of participating hotel guests in 1Q2009 utilized a travel agent (23.2%), which was at parity with the same quarter last year (21.4%).**
- **Nearly one-half of surveyed hotel visitors booked at least part of their trip to PBC on the internet (48.9%), which was an increase of 2.9 percentage points relative to 4Q2008 (46.0%) and 4.4 percentage points higher than 1Q2008 (44.5%).**
  - Approximately three-quarters of surveyed hotel guests who utilized the internet to book any part of their trip to PBC did so to book hotel rooms (76.7%), nearly seventy percent reserved airfare (68.8%), and approximately one-in-three used the internet to book a rental car (36.6%).
  - During the first quarter of 2009, nearly eighty percent of hotel visitors surveyed (76.7%) utilized the internet to reserve hotel rooms, which was a 12.0 percentage point increase compared to those surveyed during the same quarter last year (64.7%), yet was a 4.3 percentage point decrease compared with last quarter (81.0%).
  - Hotel websites were utilized by three-in-ten surveyed visitors who reserved hotel rooms online in 1Q2009 (30.1%), which was 11.1 percentage points lower than 4Q2008 (41.2%) and 2.8 percentage points lower than in 1Q2008 (32.9%).
  - Only 5.2% of surveyed hotel guests during the first quarter of 2009 stated that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meals, rental car, etc), which was at parity with the same quarter last year (3.7%) and last quarter (5.1%).

Visitor Expenditures

- **During 1Q2009, in Palm Beach County, the average spending per party* was $1,763, which was $357 (25.4%) more than the average spending per party last quarter ($1,406), but $89 (4.8%) less than the same quarter last year ($1,852).**
  - Compared to the fourth quarter of 2008, 'Lodging' and 'Entertainment/Recreation' had the largest margins of increase in 1Q2009 ('Lodging' - from $725 to $1,034, a 42.6 percentage point increase, 'Entertainment/Recreation' – from $44 to $74, a 68.2 percentage point increase).
  - The only spending category to decrease compared with 4Q2008 was "Gifts/Shopping" (from $152 in 4Q2008 to $82 in 1Q2009, a 46.1 percentage point decrease).
  - The average per person expenditure in the current quarter ($928) increased compared to 4Q2008 ($740, up 25.4 percentage points), but remained at parity relative to 1Q2008 ($926).
- **On average, surveyed guests vacationing in PBC spent $2,274 per party, while those traveling for business spent an average of $1,373.**
  - Leisure and business travelers' per party expenditures increased relative to 4Q2008 (leisure - up 38.3%, from $1,644 to $2,274 and business – up 7.8%, from $1,274 to $1,373).
  - Relative to 1Q2008, leisure travelers' per party spending decreased by 8.1 percentage points (from $2,475 in 1Q2008 to $2,274 in 1Q2009), while business travelers' per party spending decreased by 4.4 percentage points (from $1,436 in 1Q2008 to $1,373 in 1Q2009).

* 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 2009

Characteristics of Visitors

- In 1Q2009, more than nine-in-ten PBC visitors were White/Caucasian (93.9%).
- Compared to the same quarter last year, those visiting PBC during the first quarter of 2009 between the ages of 35 and 54 decreased by 7.9 percentage points (from 56.3% in 1Q2008 to 48.4% in 1Q2009), while those visiting PBC between the ages of 55 and 64 increased by 5.4 percentage points (from 19.6% in 1Q2008 to 25.0% in 1Q2009).
- Six-in-ten responding hotel guests in 1Q2009 cited having professional/managerial jobs (60.6%).
- Nearly three-quarters of surveyed hotel guests in 1Q2009 claimed an annual household income of $100,000 or more (73.5%).
- During the first quarter of 2009, hotel guests traveling for pleasure typically traveled to PBC with 'Adult Family Members and/or Friends' (79.5%), while business hotel guests traveled by themselves most often (59.7%).

Travel Details

- Similar to prior quarters, Palm Beach County was the main destination for nine-in-ten surveyed hotel visitors in 1Q2009 (90.2%).
- Approximately two-in-ten surveyed hotel guests claimed that this was their first time visiting Palm Beach County (22.2%).
- Nearly three-quarters of surveyed hotel guests traveled by airplane to Palm Beach County in 1Q2009 (74.9%), which was a 7.6 percentage point decrease from 1Q2008 (82.5%), yet at parity with 4Q2008 (77.2%).
- At 31.0%, travel by car to PBC increased by 8.3 percentage points compared to 1Q2008 (22.7%), but remained at parity relative to 4Q2008 (28.6%).
- Nine-in-ten surveyed visitors in 1Q2009 traveled from within the United States (89.6%). This was a 5.4 percentage point increase relative to 4Q2008 (84.2%) and a 1.6 percentage point decrease compared to 1Q2008 (91.2%).

Attitudes toward Palm Beach County

- At 46.4%, 'Climate/Weather' continued to have been cited by surveyed hotel visitors during 1Q2009 as the aspect they liked the best about PBC.
- 'Traffic/Bad Drivers' (31.7%) was the top mentioned feature that 1Q2009 surveyed guests claimed not to like about Palm Beach County. 'Humidity/Poor Weather' followed as the next most frequently mentioned response (11.7%).

Activity Participation

- As was the case for all months within the quarter, as well as last quarter and last year, more than nine-in-ten surveyed visitors dined at local restaurants while staying in Palm Beach County (95.6%). Shopping (31.1%), Going to the beach (27.4%), Swimming (12.6%), and/or Golf/Tennis (12.4%) were among other specific activities guests enjoyed during their stay in PBC.
- The top activities in which hotel visitors stated they participated during a recent trip, yet wished they could have done in Palm Beach County were Golfing (17.7%) and Going to the beach (11.0%) (both of which are currently available in PBC).

Hotel Visitor Survey: 1st Quarter 2009

Hotel Visitor Study

Return Visits

- **Comparable to previous quarters, more than eighty-percent of surveyed hotel guests plan to return to PBC in the future (84.4%). Only 2.6% claimed they will not return. The remainder (13.0%) were not sure if they will come back to PBC in the future or not.**
  - Approximately seventy percent of those who plan to visit Palm Beach County again cited they will do so in the next year (69.2%), one-third (34.0%) plan to return to PBC within the next three months.
  - The top reasons for those claiming they will not be visiting PBC again include: 'No business in the area/Relocation of meeting' (10.5%) and 'Going to other places/I like changing destinations' (9.7%).

Vacation/Leisure Visitors

- During 1Q2009, nearly two-thirds of surveyed leisure visitors cited traveling within the United States for their last vacation (65.1%). Locations in Florida (26.8%) and the Far West (14.8%) were the top domestic destinations mentioned.
- One-third of participating leisure hotel guests vacationed in a country abroad on their last trip (34.0%); countries in Latin America/Caribbean (14.4%) or Europe (14.0%) were visited most often.
- Nearly two-thirds of responding leisure visitors considered other domestic destinations when planning their vacation (64.6%). The top domestic locations considered were Florida (59.6%) and the Far West (5.1%).
- Throughout 1Q2009, PBC was seen as comparable to other vacation destinations. More than one-half of responding leisure visitors claimed that PBC was about the same as their most recent vacation destination in terms of the following:
  - Being able to always find a new place to see or a new thing to do (64.1%)
  - Being great for discovering nature-based activities/ecotourism (63.1%)
  - Being appreciated as a tourist or visitor (62.4%)
  - Being a great place to go again and again (61.3%)
  - Being a good value (61.0%)
  - Being great for historical sights and places (60.2%)
  - Being great for museums and other cultural activities (60.2%)

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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 2009

	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Occupancy Rate								
Month/Quarter	69.2%	67.2%	72.1%	68.3%	78.9%	65.5%	53.6%	57.8%
FYTD (Oct. - Sept.)	63.5%	60.2%	62.6%	63.5%	70.8%	69.0%	65.2%	57.8%
Room Nights Occupied[1*]								
Month/Quarter	923,953	307,405	302,946	313,602	1,050,605	876,238	727,536	783,412
FYTD (Oct. - Sept.)	1,707,365	1,090,817	1,393,763	1,707,365	1,895,515	2,771,753	3,499,289	783,412
Percentage of Room Nights Occupied								
Leisure	42.3%	39.8%	46.0%	39.9%	40.9%	35.7%	36.6%	38.3%
Business	32.9%	37.0%	29.8%	33.1%	29.3%	32.8%	36.9%	34.4%
Convention/Group	24.8%	23.2%	24.3%	27.0%	29.8%	31.5%	26.5%	27.4%
Average Daily Room Rate [2]	$188.55	$177.00	$199.44	$190.16	$232.14	$154.58	$121.39	$150.60

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 2009

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	01/02	02/03	03/04	04/05	05/06	06/07	07/08	08/09
1st Quarter (Jan/Feb/Mar)	76.2	77.9	83.8	88.3	84.7	80.8	78.9	69.2
January	69.0	71.3	74.2	84.0	79.7	73.8	73.0	67.2
February	81.4	81.7	88.8	91.1	86.3	82.8	81.8	72.1
March	79.7	81.4	88.4	89.9	87.1	85.6	81.8	68.3
2nd Quarter (April/May/June)	65.1	67.0	71.8	72.7	71.0	68.5	65.5	N/A
3rd Quarter (July/Aug/Sept)	57.3	57.8	64.2	63.0	56.9	56.0	53.6	N/A
4th Quarter (Oct/Nov/Dec)	57.5	59.8	64.2	79.8	73.1	64.6	62.9	57.8
Fiscal YTD (Oct. – Sept.)	**64.1**	**65.7**	**70.9**	**76.0**	**71.2**	**67.4**	**65.2**	**63.5**
Number of Room Nights Occupied in 1st Quarter*							**1,050,605**	**923,953**

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

Property Manager Survey: 1st Quarter 2009

	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Conference/Convention Bookings								
All Hotels								
% Occupied Room Nights in County	26.6%	23.2%	24.3%	27.0%	29.8%	31.5%	26.5%	27.4%
Occupied Room Nights in County	229,687	71,429	73,463	84,795	313,863	276,256	192,286	214,588
Occupied Room Nights in County FYTD (Oct.- Sept.)	444,275	286,017	359,480	444,275	548,460	824,716	1,017,002	214,588
Convention Hotels								
% Occupied Room Nights	26.6%	25.1%	29.1%	25.5%	31.7%	35.6%	30.3%	29.1%
Occupied Room Nights	143,304	45,410	51,857	46,037	192,168	186,568	131,933	137,795
Occupied Room Nights FYTD (Oct.- Sept.)	261,099	183,205	235,062	281,099	348,588	535,156	667,089	137,795
Available Inventory*								
Rooms in County	44,575	14,765**	15,001**	14,809**	43,946	44,175	44,130	44,145
Room Nights	1,336,822	457,715	420,028	459,079	1,333,012	1,339,981	1,353,315	1,353,780
Room Nights FYTD (Oct.- Sept.)	2,690,602	1,811,495	2,231,523	2,690,602	2,680,410	4,020,391	5,373,706	1,353,780
Response Rate								
Month/Quarter (for all hotels in County)	59.3%	60.0%	61.7%	56.0%	60.2%	61.6%	63.6%	61.2%
FYTD (Oct.- Sept.)	60.2%	60.9%	61.1%	60.2%	61.5%	61.6%	62.1%	61.2%

* 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 17,041.

Property Manager Survey: 1st Quarter 2009

Occupancy Rate	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Size of Hotel								
50 - 100 Rooms	64.8%	62.4%	70.9%	61.0%	74.5%	52.7%	40.9%	51.1%
101 + Rooms	70.1%	68.2%	72.5%	69.9%	79.6%	67.8%	56.0%	59.1%
101-219	69.9%	68.1%	73.2%	68.9%	78.8%	63.5%	53.3%	57.6%
220-500	76.1%	73.5%	76.4%	78.4%	80.4%	72.7%	60.3%	62.0%
All Properties	69.2%	67.2%	72.1%	68.3%	78.9%	65.5%	53.6%	57.8%
Geographic Region								
North	66.9%	61.9%	66.4%	72.1%	78.5%	65.9%	53.9%	51.4%
Central	75.0%	71.5%	78.9%	75.4%	83.4%	66.4%	53.5%	61.2%
South	64.8%	65.5%	68.8%	59.7%	74.7%	64.3%	53.6%	57.4%

What percent of your occupancy is international?	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Size of Hotel								
50-100 Rooms	4.0%	1.7%	6.0%	3.5%	7.1%	7.0%	19.4%	5.1%
101 + Rooms	5.5%	6.0%	5.0%	5.2%	5.0%	4.4%	6.2%	5.4%
101-219	5.8%	7.4%	4.8%	5.0%	5.1%	5.2%	7.4%	5.0%
220-500	5.4%	3.4%	6.6%	5.5%*	7.3%	4.8%	5.4%	5.7%
All Properties	5.5%	5.6%	5.3%	5.4%	5.5%	4.8%	8.0%	5.4%
Geographic Region								
North	4.0%	2.2%	3.9%	4.9%	3.0%	2.5%	4.6%	3.3%
Central	6.2%	6.2%	5.6%	6.3%	4.6%	4.9%	6.5%	6.4%
South	5.1%	5.3%	5.3%	4.3%	7.8%	5.9%	12.0%	4.7%

* Caution: Extremely Low base

Property Manager Survey: 1st Quarter 2009

Average Daily Room Rate	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Size of Hotel								
50 - 100 Rooms*	$188.13	$170.88	$210.50	$179.24	$255.89	$140.17	$112.09	$142.22
101 + Rooms	$189.30	$178.50	$198.15	$192.91	$229.51	$157.39	$123.30	$152.88
101-219	$137.27	$132.46	$147.19	$132.99	$160.13	$114.20	$92.83	$107.49
220-500	$183.66	$177.83	$174.45	$202.76	$249.30	$164.54	$143.28	$156.92
All Properties**	$188.55	$177.00	$199.44	$190.16	$232.14	$154.58	$121.39	$150.60

* Please note that the response rate for hotels with 50-100 rooms was low in January (36.4%), February (32.6%) and March (35.7%); the hotels that replied are more upscale with higher rates (i.e. Chesterfield, Colony and Brazilian Court Hotels in Palm Beach).
** "All properties" includes those with fewer than 50 rooms.

Property Manager Survey: 1st Quarter 2009

Occupied Room Nights *	Occupied Room Nights	% Change
1Q		
2007	1,070,734	
2008	1,050,605	- 1.9
2009	923,953	- 12.1
January		
2007	335,048	
2008	330,149	- 1.5
2009	307,405	- 6.9
February**		
2007	339,530	
2008	335,704	- 1.1
2009	302,946	- 9.8
March		
2007	396,156	
2008	372,763	- 5.9
2009	313,602	- 15.9
2Q		
2007	935,524	
2008	876,238	- 6.3
2009	N/A	
3Q		
2007	763,604	
2008	727,536	- 4.7
2009	N/A	
4Q		
2007	844,910	
2008	783,412	- 7.3
2009	N/A	
FYTD (October – March)		
2007	1,929,036	
2008	1,895,515	- 1.7
2009	1,707,365	- 9.9

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

** Calculated for 28 days in February.

Property Manager Survey: 1st Quarter 2009

Future Business Outlook (for each month as compared to the same month in previous year)	Total Room Revenue	Group/Indiv. Business Room Revenue	Individual Vacation Room Revenue
February 2009/March 2009 predictions from January			
Foresee Decrease	85.0%	73.0%	76.8%
Average decrease (among those who foresee decrease)	18.5%	18.3%	16.3%
Foresee No Change	15.0%	21.0%	14.5%
Foresee Increase	0.0%	6.0%	8.7%
Average increase (among those who foresee increase)	N/A	16.9%	15.2%
March 2009/April 2009 predictions from February			
Foresee Decrease	79.9%	88.5%	81.0%
Average decrease (among those who foresee decrease)	20.0%	19.1%	20.0%
Foresee No Change	14.6%	8.8%	13.6%
Foresee Increase	5.5%	2.7%	5.3%
Average increase (among those who foresee increase)	12.0%	11.0%	8.0%
April 2009/May 2009 predictions from March			
Foresee Decrease	89.7%	83.2%	81.6%
Average decrease (among those who foresee decrease)	18.5%	19.7%	18.3%
Foresee No Change	10.3%	8.7%	14.4%
Foresee Increase	0.0%	8.1%	4.0%
Average increase (among those who foresee increase)	N/A	44.6%*	46.8%*
First Quarter predictions from January, February and March			
Foresee Decrease	87.8%	83.8%	83.7%
Average decrease (among those who foresee decrease)	19.0%	19.0%	18.3%
Foresee No Change	10.4%	10.7%	9.9%
Foresee Increase	1.8%	5.5%	6.4%
Average increase (among those who foresee increase)	12.0%	28.8%*	20.2%*

* Caution: Extremely low base.

Property Manager Survey: 1st Quarter 2009

Future Business Outlook (for each month as compared to the same month in previous year)	Total Room Revenue	Group/Indiv. Business Room Revenue	Individual Vacation Room Revenue
April 2009/May 2009 predictions from January			
Foresee Decrease	81.0%	74.4%	70.5%
Average decrease (among those who foresee decrease)	15.7%	17.0%	16.0%
Foresee No Change	16.7%	25.6%	23.2%
Foresee Increase	2.3%	0.0%	6.3%
Average increase (among those who foresee increase)	3.0%	N/A	9.4%
May 2009/June 2009 predictions from February			
Foresee Decrease	74.6%	73.2%	74.1%
Average decrease (among those who foresee decrease)	20.7%	19.4%	19.9%
Foresee No Change	16.7%	15.0%	17.7%
Foresee Increase	8.7%	11.7%	8.2%
Average increase (among those who foresee increase)	13.5%	6.1%	10.5%
June 2009/July 2009 predictions from March			
Foresee Decrease	80.4%	74.4%	81.6%
Average decrease (among those who foresee decrease)	17.2%	20.1%	17.7%
Foresee No Change	12.0%	15.0%	12.2%
Foresee Increase	7.6%	10.6%	6.2%
Average increase (among those who foresee increase)	12.0%	32.7%*	21.7%*
First Quarter predictions from January, February and March			
Foresee Decrease	81.9%	77.0%	78.3%
Average decrease (among those who foresee decrease)	17.8%	18.9%	17.9%
Foresee No Change	11.8%	15.2%	14.3%
Foresee Increase	6.3%	7.8%	7.4%
Average increase (among those who foresee increase)	11.6%	17.7%*	13.5%*

* Caution: Extremely low base

Property Manager Survey: 1st Quarter 2009

Bookings via third party website	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Size of Hotel								
50 - 100 Rooms	11.9%	11.3%	16.2%	8.9%	21.8%	16.8%	29.0%	19.1%
101 + Rooms	14.5%	14.2%	14.0%	15.0%	9.4%	11.3%	13.6%	13.7%
101-219	14.6%	14.8%	13.4%	15.7%	9.9%	12.1%	14.0%	13.7%
220-500	17.2%	13.3%	19.7%	12.2%	8.1%	8.1%	13.6%	16.2%
All Properties*	15.1%	15.7%	15.7%	13.7%	14.5%	13.4%	18.4%	15.9%

* “All properties” includes those with fewer than 50 rooms.

Property Manager Survey: 1st Quarter 2009

	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
MARKET FOCUS (in terms of marketing, advertising and promotion)								
Florida Leisure Drive Market	77.0%	77.3%	77.3%	75.6%	88.2%	88.9%	70.0%	78.8%
Florida Business Drive Market	62.6%	63.4%	62.0%	60.0%	72.7%	71.3%	56.2%	63.2%
Florida Association Market	54.3%	49.9%	56.9%	55.0%	45.5%	57.6%	63.3%	52.9%
Weddings	63.2%	68.9%	61.4%	60.0%	62.2%	64.0%	57.4%	60.8%
Amateur Sports Events	68.2%	64.7%	68.3%	70.7%	61.5%	58.4%	59.9%	54.8%
Convention - Northeast	32.3%	30.9%	29.4%	37.5%	22.8%	17.9%	26.9%	27.8%
Convention - Mid-Atlantic	30.1%	30.8%	25.1%	35.0%	11.4%	10.0%	21.4%	25.9%
Convention - South	34.3%	33.1%	29.4%	42.5%	21.5%	19.9%	28.0%	29.4%
Convention - Midwest	22.0%	26.3%	20.0%	20.0%	11.2%	14.0%	20.8%	18.8%
Other**	13.7%	13.0%	14.9%	22.0%	N/A	12.3%	20.3%	18.9%

** OTA's - Corporate travel (four mentions), Small meetings (three mentions), Contractors (two mentions), Small Groups, Colleges, Performing Arts, Spring Break, No Answer, Construction, Arts - Kravis Center, Tour Groups (one mention each)

Property Manager Survey: 1st Quarter 2009

Greatest challenges for 2009*	Total
Economy Net	**57**
Economy (non-specific)	37
Maintaining rates / Getting higher rates	5
Hotels that are cutting rates / Competition is not holding rates	4
Increasing ADR	4
Heads in beds	3
Keeping occupancy up without diluting rates	2
Competing with rate decreases	2
Lowering ADR by 20-25%	1
Maintaining occupancy above 65-70% through April	1
Decreasing rates by 25-30% for summer business	1
Keeping occupancy in a down economy	1
Rate integrity in the South Palm Beach County Area	1
Extreme price resistance of guests	1
Company cutbacks in travel	1
Prospect group business taking longer to make final decisions and contracts based on the economy	1
Sluggish transient market	1
Hope the economic situation gets better so we can increase room nights and room revenue	1
It continues to be an economic down turn and companies like the AIG's of the world	1
Rate integrity in the market	1
Corporate travel and meeting budget cuts	1
Over supply – under demand	1
Driving occupancy into 2nd and 3rd Quarters	1
Lack of corporate meetings	1
Group cancellations due to public perception	1
Group market	1

* Multiple responses accepted.

Property Manager Survey: 1st Quarter 2009

Greatest challenges for 2009 (continued)*	Total
Miscellaneous Net	**16**
Group cancellations due to perception / Group business	6
Competition/Over supply of hotels in the area	3
Attracting guests	1
Offering creative packages	1
Driving occupancy throughout the summer	1
New hotels opening – rates being cut	1
Fewer air flights	1
Airlines (general)	1
In the past month our resort has experienced last minute cancellations, several of them being long stays and suite bookings.	1
The short term booking window (2-4 weeks) makes it hard to determine business levels more than 4 weeks out.	1
Getting my share of the market	1
Long term stays	1
No major challenges but we would like to maintain our standard of affordable clean comfortable rooms	1
Demand	1
Competitors are not adjusting to demand	1
Increasing revenue over last year	1

* Multiple responses accepted.

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's 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?.” (removed from survey)

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.

Methodology

Survey Changes (continued)

In July 2008, the visitors' survey was once again revised and updated to better address the Tourist Development Council's needs in terms of tourist information.

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

-The question "What would make your next trip better?" was replaced with "What one activity did you do on a recent trip that you wish you could do in Palm Beach County?"

-The following questions were added for vacation/leisure guests only:

-"Where did you go on your last vacation?"

-"What other destinations, in Florida or elsewhere, did you consider when planning this leisure visit to Palm Beach County?"

-"How does this visit to Palm Beach County compare to your last vacation in terms of…"

- "Being a great place to go again and again"
- "Being able to always find a new place or see a new thing to do"
- "Being appreciated as a tourist or visitor"
- "Being a good value"
- "Being great for historical sights and places"
- "Being great for discovering nature-based activities/ecotourism"
- "Being great for museums and other cultural activities"

Hotel Survey: 1st Quarter 2009

Characteristics of Stay	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Average Party Size *	1.9	1.9	1.9	2.0	2.0	2.0	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	4.8	5.1	4.6	4.6	3.6	3.4	3.7	3.8
Nights in Hotel	3.9	3.9	3.8	4.0	3.5	3.3	3.5	3.7
Rooms per Night *	1.2	1.3	1.2	1.2	1.3	1.3	1.3	1.2

* 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 2009

Visitor Expenditures+	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Average Expenditure Per Visit								
Lodging	$1,034	$1,010	$1,022	$1,060	$1,106	$700	$602	$725
Restaurant/Bar	$402	$437	$384	$392	$438	$350	$336	$352
Gifts/Shopping	$82	$86	$72	$88	$109	$99	$161	$152
Entertainment/ Recreation	$74	$137	$34	$36	$42	$23	$39	$44
Local Travel	$172	$156	$186	$180	$158	$116	$144	$133
Total Per Party*	$1,763	$1,825	$1,699	$1,756	$1,852	$1,287	$1,281	$1,406
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$928	$961	$894	$878	$926	$644	$610	$740
Total Per Person/ Per Day	$238	$246	$235	$220	$265	$195	$174	$200
Lodging	$139	$136	$142	$133	$158	$106	$82	$103
Restaurant/Bar	$54	$59	$53	$49	$63	$53	$46	$50
Gifts/Shopping	$11	$12	$10	$11	$16	$15	$22	$22
Entertainment/ Recreation	$10	$18	$5	$5	$6	$4	$5	$6
Local Travel	$23	$21	$26	$23	$23	$18	$20	$19

* 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 2009

Visitor Expenditures+	Pleasure							
	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Average Expenditure Per Visit								
Lodging	$1,254	$1,134	$1,448	$1,206	$1,364	$781	$655	$708
Restaurant/Bar	$505	$562	$510	$441	$594	$418	$402	$396
Gifts/Shopping	$172	$177	$168	$162	$230	$162	$316	$280
Entertainment/ Recreation	$172	$374	$66	$68	$90	$40	$62	$96
Local Travel	$172	$146	$230	$135	$198	$140	$156	$164
Total Per Party*	$2,274	$2,392	$2,423	$2,012	$2,475	$1,541	$1,591	$1,644
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$989	$1,139	$1,009	$774	$952	$593	$612	$685
Total Per Person/ Per Day	$202	$219	$198	$172	$212	$165	$157	$171
Lodging	$111	$104	$118	$103	$117	$83	$65	$74
Restaurant/Bar	$45	$51	$42	$38	$51	$45	$40	$41
Gifts/Shopping	$15	$16	$14	$14	$20	$17	$31	$29
Entertainment/ Recreation	$15	$34	$5	$6	$8	$4	$6	$10
Local Travel	$15	$13	$19	$12	$17	$15	$15	$17

* 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 2009

Visitor Expenditures+	Business							
	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Average Expenditure Per Visit								
Lodging	$849	$835	$725	$935	$902	$630	$584	$728
Restaurant/Bar	$316	$331	$283	$343	$339	$300	$300	$329
Gifts/Shopping	$31	$35	$22	$35	$50	$60	$59	$84
Entertainment/ Recreation	$16	$20	$17	$11	$17	$12	$26	$18
Local Travel	$161	$142	$140	$207	$129	$96	$139	$116
Total Per Party*	$1,373	$1,363	$1,187	$1,530	$1,436	$1,098	$1,109	$1,274
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$916	$757	$848	$1,093	$898	$686	$652	$849
Total Per Person/ Per Day	$295	$261	$303	$312	$321	$229	$198	$243
Lodging	$183	$160	$185	$191	$201	$131	$104	$139
Restaurant/Bar	$68	$63	$72	$70	$76	$63	$54	$63
Gifts/Shopping	$7	$7	$6	$7	$11	$13	$11	$16
Entertainment/ Recreation	$3	$4	$4	$2	$4	$3	$5	$3
Local Travel	$35	$27	$36	$42	$29	$20	$25	$22

* 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 2009

Planning the Trip to Palm Beach County	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Reason for Trip								
Conference/Convention/ Business Meeting	52.7%	53.9%	58.0%	47.2%	62.5%	57.9%	55.9%	60.2%
- Business Meeting	47.4%	49.8%	52.4%	41.2%	51.2%	49.7%	47.6%	50.8%
- Conference/Convention	5.1%	4.1%	4.8%	6.0%	11.2%	7.9%	8.4%	9.2%
- Other Business	0.3%	0.0%	0.8%	0.0%	0.1%	0.3%	0.0%	0.1%
Vacation/Pleasure	38.7%	38.4%	38.4%	38.6%	32.7%	36.5%	35.9%	33.6%
Sporting Event	4.3%	3.8%	0.4%	8.2%	2.9%	1.2%	1.7%	3.1%
Cultural Event/Attraction	1.4%	0.8%	0.4%	3.0%	0.3%	0.2%	0.3%	0.4%
Film/TV location scouting/production	0.2%	0.0%	0.4%	0.4%	0.1%	0.1%	0.1%	0.0%
Other	2.7%	3.1%	2.5%	2.5%	1.6%	4.1%	6.1%	2.7%
Who Made the Decision*								
Employer	50.4%	49.7%	58.3%	46.6%	57.7%	54.2%	52.1%	57.2%
Head of Household/ Other adult	44.8%	47.2%	36.1%	47.0%	34.2%	35.6%	40.5%	38.1%
Family Living in PBC	5.4%	3.6%	5.5%	8.0%	7.9%	10.6%	6.7%	5.9%
Children Influenced Decision	1.1%	0.5%	0.8%	1.8%	1.0%	1.1%	1.4%	0.4%
Advanced Planning								
One Month or Less	54.3%	56.2%	56.8%	49.0%	53.0%	52.3%	67.2%	56.3%
2 to 3 Months	20.7%	20.6%	19.8%	23.1%	23.1%	24.8%	15.2%	21.0%
More than 3 Months	25.1%	23.2%	23.4%	27.9%	23.9%	22.9%	17.6%	22.7%

* Multiple responses accepted.

Hotel Survey: 1st Quarter 2009

Planning the Trip to Palm Beach County (Continued)	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	50.6%	49.1%	58.9%	45.3%	59.6%	56.5%	55.1%	58.7%
Visit Friends/Relatives	26.1%	27.7%	25.7%	24.1%	19.6%	22.5%	18.8%	20.3%
Previous Visit	19.1%	19.8%	18.3%	18.6%	15.1%	11.7%	14.0%	10.6%
Weather	8.6%	10.9%	6.3%	8.4%	6.1%	7.2%	4.6%	4.8%
Special Event	5.7%	3.7%	2.6%	10.1%	5.7%	11.6%	5.1%	6.8%
Beaches	5.7%	8.4%	3.4%	5.7%	4.6%	6.8%	6.5%	4.3%
Convenient Flights	5.0%	6.0%	5.1%	3.5%	5.9%	3.4%	4.5%	4.5%
Attend Sporting Event	3.3%	3.2%	0.5%	5.9%	1.0%	0.0%	0.3%	1.2%
Golf/Tennis/Recreation	3.1%	4.9%	1.3%	2.9%	3.8%	1.8%	1.7%	2.8%
Friends/Relatives recommendation	2.8%	3.1%	2.1%	3.1%	2.8%	2.4%	3.0%	2.0%
Hotel Brochure/Website	1.9%	1.6%	2.2%	1.8%	0.7%	0.9%	1.6%	1.3%
Attraction Brochure/Website	1.1%	1.4%	0.8%	0.9%	0.3%	0.1%	0.6%	0.3%
Spring Training	1.0%	0.0%	0.0%	2.5%	1.6%	0.0%	0.0%	0.0%
Compete in Sporting Event	0.8%	0.0%	0.8%	1.7%	0.7%	1.4%	1.0%	1.5%
Art/Cultural Event	0.7%	1.0%	0.4%	0.5%	0.4%	0.3%	0.4%	0.2%
Other Internet Sources	0.3%	0.0%	0.4%	0.5%	0.1%	0.3%	0.6%	0.2%
Travel Agency	0.3%	0.0%	0.4%	0.5%	0.4%	0.1%	0.1%	0.0%
Media Coverage	0.2%	0.0%	0.0%	0.5%	0.0%	0.1%	0.0%	0.0%
Bus Tour	0.1%	0.0%	0.0%	0.4%	0.0%	0.2%	0.0%	0.1%
PBC-CVB Information/ Website	0.1%	0.0%	0.4%	0.0%	0.3%	0.5%	0.4%	0.5%
State Tourist Agency	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Other	3.1%	3.5%	1.8%	4.3%	3.9%	4.1%	6.0%	4.4%

* Multiple responses accepted.

Hotel Survey: 1st Quarter 2009

Booking Tools	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Booked Trip with Travel Agency								
Yes	23.2%	17.6%	29.7%	23.3%	21.4%	21.8%	23.4%	25.7%
No	76.8%	82.4%	70.3%	76.7%	78.6%	78.2%	76.6%	74.3%
Booked Any Part of Trip Using Internet								
Yes	48.9%	53.0%	48.3%	42.9%	44.5%	44.6%	47.4%	46.0%
No	51.1%	47.0%	51.7%	57.1%	55.5%	55.4%	52.6%	54.0%
Booked Any Part of Trip Using Internet* **(among those who used the Internet)**								
Hotel	76.7%	74.4%	72.6%	84.1%	64.7%	75.1%	82.7%	81.0%
Hotel website	30.1%	25.3%	26.1%	40.4%	32.9%	38.2%	38.0%	41.2%
Expedia	7.7%	7.1%	7.0%	9.2%	4.1%	2.9%	7.7%	5.3%
Travelocity	4.8%	5.7%	6.4%	1.2%	1.6%	2.9%	6.4%	4.1%
Hotwire	2.1%	2.9%	0.9%	2.2%	2.0%	1.9%	3.9%	3.4%
Orbitz	1.7%	0.5%	2.7%	2.0%	1.0%	3.3%	1.7%	3.0%
Hotels.com	1.6%	1.6%	1.0%	2.3%	1.0%	2.7%	2.7%	3.1%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Other Website	7.0%	4.2%	6.2%	12.2%	6.6%	3.6%	7.5%	6.6%
Don't Remember	22.7%	27.8%	23.1%	16.6%	16.4%	20.6%	17.7%	18.2%
Air	68.8%	76.4%	61.7%	65.7%	70.7%	68.4%	61.3%	66.0%
Car Rental	36.6%	38.1%	36.8%	34.6%	37.8%	40.4%	37.7%	31.3%
Tickets to Event	0.6%	0.0%	1.9%	0.0%	1.1%	0.7%	0.0%	0.3%
Other	6.2%	4.3%	11.4%	5.0%	5.7%	3.8%	3.9%	4.3%
Visit was Part of Package **(that may have included airfare,lodging,meals,rental car, etc.)**								
Yes	5.2%	5.0%	8.2%	2.7%	3.7%	5.5%	6.2%	5.1%
No	94.8%	95.0%	91.8%	97.3%	96.3%	94.5%	93.8%	94.9%

* Multiple responses accepted.

Hotel Survey: 1st Quarter 2009

Activity Participation	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Participation in Specific Activities*								
Restaurants	95.6%	96.6%	91.4%	98.2%	95.5%	93.5%	94.7%	95.6%
Shopping	31.1%	38.1%	27.5%	28.0%	31.1%	28.8%	32.2%	32.5%
Went to Beach	27.4%	28.6%	26.1%	28.6%	25.6%	31.6%	30.2%	26.3%
Swimming	12.6%	14.9%	5.2%	18.9%	11.3%	20.2%	22.6%	14.0%
Golf, Tennis	12.4%	9.8%	14.1%	12.7%	12.6%	6.1%	7.3%	10.4%
Bars/Nightclubs	9.2%	11.5%	9.9%	6.0%	8.2%	8.7%	8.6%	8.6%
Visited downtown West Palm Beach Attractions/City Place	9.0%	7.1%	11.1%	8.9%	8.9%	8.6%	9.0%	10.5%
Visited Downtown Delray Beach Attractions	6.8%	7.6%	5.5%	7.5%	5.3%	5.6%	5.2%	8.0%
Visited Mizner Park/Boca Raton	6.7%	6.8%	8.1%	5.2%	7.3%	5.5%	4.3%	5.9%
Museums, Art Galleries	3.9%	4.5%	3.4%	3.4%	4.1%	2.7%	2.3%	5.0%
Attended a Sporting Event	3.3%	1.6%	0.9%	7.2%	3.5%	0.4%	1.9%	2.3%
Visited Wildlife Refuge	3.2%	3.2%	4.8%	1.4%	4.1%	1.9%	2.4%	3.3%
Visited Palm Beach/Worth Avenue	3.0%	4.5%	0.9%	3.2%	3.3%	1.3%	1.0%	3.1%
Attractions, Tours, Zoo	2.8%	2.5%	3.8%	2.1%	2.8%	2.0%	2.3%	1.9%
Performing Arts (plays, concerts, dance)	2.8%	4.1%	1.2%	3.1%	1.1%	0.8%	1.3%	1.6%
Visited Downtown at the Gardens	2.4%	4.5%	1.7%	1.6%	2.8%	2.3%	1.5%	2.1%
Fishing	1.7%	0.9%	3.0%	1.3%	1.3%	1.6%	1.1%	1.7%
Boating	1.5%	0.7%	2.9%	0.9%	1.8%	3.3%	2.5%	1.3%
Visited downtown Lake Worth	1.5%	1.4%	2.6%	0.4%	1.0%	0.9%	1.3%	0.7%
Horse Related Activities	1.2%	0.8%	0.0%	2.6%	1.2%	0.4%	0.1%	0.6%
Visited Riviera Beach/Singer Island	0.7%	1.3%	0.4%	0.4%	1.4%	0.7%	1.0%	1.4%
Surfing	0.4%	0.4%	0.8%	0.0%	0.1%	0.3%	0.3%	0.7%
Pari-mutuels (dog-track)	0.4%	0.3%	0.4%	0.4%	0.1%	0.0%	0.0%	0.6%
Competed in Sports Event	0.4%	0.0%	0.0%	1.2%	0.3%	0.0%	0.3%	0.5%
Snorkeling	0.2%	0.0%	0.0%	0.5%	0.0%	1.0%	1.7%	0.7%
Gambling Cruise	0.2%	0.5%	0.0%	0.0%	0.7%	1.1%	0.7%	0.7%
Diving	0.1%	0.0%	0.0%	0.4%	0.1%	0.1%	0.7%	0.2%
Kite Surfing	0.1%	0.3%	0.0%	0.0%	0.1%	0.3%	0.0%	0.0%
Palm Beach County Convention Center	0.1%	0.3%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Other	7.2%	4.9%	9.4%	7.3%	10.3%	8.7%	10.4%	8.9%

*Multiple responses accepted.

Hotel Survey: 1st Quarter 2009

Return Visits	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Plan to Return to PBC								
Yes	84.4%	85.9%	80.8%	85.8%	83.0%	82.3%	85.4%	82.1%
No	2.6%	2.0%	3.2%	2.4%	2.6%	3.3%	3.1%	3.2%
Don't know	13.0%	12.2%	16.0%	11.9%	14.4%	14.4%	11.5%	14.7%
If no, why not?* (Top mentions – 4% or higher)	n = 19	n = 5**	n = 8**	n = 6**	n = 19	n = 24	n = 23	n = 24
No business in the area/Relocation of meeting	10.5%	0	1	1	20.3%	12.9%	17.6%	28.6%
Going to other places/I like changing destinations	9.7%	0	2	0	0.0%	4.0%	0.0%	4.1%
Came only for a funeral	6.1%	0	1	0	0.0%	0.0%	0.0%	0.0%
Traffic	5.5%	0	0	1	0.0%	0.0%	0.0%	0.0%
Prefer other destinations	5.5%	0	1	0	10.3%	0.0%	0.0%	4.6%
Too expensive	5.2%	1	0	0	10.5%	0.0%	0.0%	4.2%
Too far	5.1%	1	0	0	0.0%	0.0%	0.0%	0.0%
Don't like it here	5.1%	0	0	1	0.0%	0.0%	0.0%	0.0%
Too hot/Don't like hot climate/weather	5.0%	1	0	0	0.0%	0.0%	0.0%	9.1%
No friends in the area anymore	5.0%	1	0	0	0.0%	0.0%	0.0%	0.0%
Don't like Palm Beach/U.S.	0.0%	0	0	0	0.0%	4.0%	12.8%	4.2%
Usually go to west coast of Florida	0.0%	0	0	0	0.0%	0.0%	0.0%	4.1%
No direct flights	0.0%	0	0	0	0.0%	0.0%	0.0%	4.1%
No reason/No answer	37.2%	1	3	3	43.1%	67.5%	47.6%	37.2%
When do you plan on returning to PBC?								
Within the next 3 months	34.0%	38.9%	34.1%	27.5%	30.2%	34.9%	35.1%	34.3%
Within the next 6 months	8.3%	6.0%	11.2%	9.4%	11.4%	9.7%	13.9%	13.0%
Within the next year	26.9%	27.1%	23.8%	29.1%	31.9%	25.0%	21.0%	20.3%
Within the next few years	5.6%	5.8%	5.1%	5.8%	3.0%	4.8%	3.6%	5.0%
Don't Know	25.2%	22.2%	26.0%	28.2%	23.5%	25.7%	26.4%	27.4%

*Multiple responses accepted. ** Raw numbers shown due to low base size

Hotel Survey: 1st Quarter 2009

Travel Details	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Main Destination								
Palm Beach County	90.2%	88.8%	92.0%	90.4%	92.1%	91.3%	90.9%	90.2%
First Trip to PBC	22.2%	22.8%	20.6%	24.4%	26.2%	29.0%	24.8%	29.9%
Type of Transportation*								
Airplane	74.9%	71.7%	82.6%	71.4%	82.5%	74.4%	69.1%	77.2%
Car	31.0%	37.0%	21.5%	33.4%	22.7%	30.5%	35.6%	28.6%
Other	0.3%	0.0%	0.0%	0.9%	0.5%	0.8%	0.5%	0.2%

*Multiple responses accepted.

Hotel Survey: 1st Quarter 2009

Attitudes about Trip to Palm Beach County	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Things Liked Best – Top Mentions								
Climate/Weather	46.4%	49.8%	46.1%	44.0%	52.4%	34.7%	26.6%	42.4%
Beaches/Ocean	8.2%	7.4%	9.3%	7.2%	8.6%	15.0%	17.0%	9.8%
Beautiful/Nice Area	7.7%	10.2%	6.1%	7.3%	4.9%	9.4%	9.3%	7.0%
Visiting Family/Friends	4.8%	4.4%	2.8%	7.2%	4.0%	4.4%	3.3%	5.1%
Relaxing Atmosphere	4.4%	5.4%	2.3%	5.6%	3.6%	3.3%	4.7%	4.5%
Nice People	3.5%	2.3%	4.2%	3.9%	3.4%	4.1%	6.6%	4.0%
Cleanliness	3.4%	4.1%	2.8%	3.9%	3.6%	2.7%	4.1%	4.2%
Location	2.2%	2.2%	3.3%	1.0%	1.2%	2.6%	2.3%	1.5%
Restaurant/Food	2.0%	0.5%	3.3%	2.0%	2.4%	3.1%	2.6%	2.9%
Shopping	1.9%	1.8%	3.3%	0.5%	1.1%	1.5%	1.2%	2.8%
Hotel	1.7%	0.7%	1.4%	3.0%	2.0%	2.4%	3.5%	1.7%
Golf	1.4%	0.4%	1.0%	2.9%	1.7%	1.5%	1.7%	2.6%
Everything	1.1%	1.0%	1.4%	0.9%	0.3%	2.9%	2.4%	1.2%
Palm Trees	0.3%	0.5%	0.0%	0.5%	1.6%	2.5%	1.8%	1.6%
Other	11.8%	9.2%	12.7%	10.3%	10.0%	10.9%	13.2%	9.5%

Hotel Survey: 1st Quarter 2009

Attitudes about Trip to Palm Beach County	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Things Liked Least – Top Mentions								
Traffic/Bad Drivers	31.7%	32.1%	29.6%	34.2%	35.4%	26.4%	23.1%	31.6%
Humidity/Poor Weather	11.7%	11.0%	13.9%	11.2%	10.2%	21.7%	30.1%	16.8%
Expensive	5.8%	7.4%	6.0%	3.6%	8.0%	5.5%	4.4%	4.2%
Too crowded	4.8%	5.8%	2.5%	7.2%	3.6%	2.5%	2.4%	0.6%
Hotel (general)	4.2%	6.4%	4.9%	1.0%	2.6%	1.2%	1.1%	2.6%
Unfriendly people	1.5%	1.9%	1.6%	0.8%	1.4%	3.3%	3.3%	2.5%
Stay Was Too Short	1.5%	1.0%	1.6%	1.9%	3.8%	1.4%	1.9%	2.2%
Work	0.9%	1.0%	0.8%	1.0%	0.0%	2.5%	1.1%	1.3%
Bad neighborhoods / Urban blight	0.9%	1.0%	0.0%	1.8%	1.8%	2.3%	0.8%	0.9%
Road Construction	0.3%	0.0%	0.8%	0.0%	5.2%	2.7%	1.1%	0.9%
Other	23.8%	18.9%	25.0%	25.0%	23.0%	25.0%	19.7%	24.6%
Nothing liked least	12.4%	12.9%	12.4%	12.2%	6.0%	5.4%	11.4%	11.6%

Hotel Survey: 1st Quarter 2009

What one activity did you do on a recent trip that you wish you could do in Palm Beach County? (Top mentions – 2% or higher in total)	**Total 1Q2009**	**Jan. 2009**	**Feb. 2009**	**Mar. 2009**
Activities Available Currently in PBC				
Golfing	17.7%	19.8%	21.3%	9.8%
Going to the beach	11.0%	9.0%	13.4%	9.5%
Snorkeling	5.2%	4.7%	5.7%	5.1%
Fishing/Deep sea fishing	4.1%	0.0%	9.5%	2.5%
Sightseeing/Visiting historical sights	4.0%	3.5%	5.7%	2.6%
Swimming	3.5%	5.0%	2.0%	2.2%
Shopping	2.7%	1.9%	1.9%	4.7%
Boating	2.6%	1.8%	3.7%	2.5%
Surfing	2.5%	4.9%	0.0%	2.6%
Scuba diving	2.3%	2.3%	3.9%	0.0%
Playing tennis	2.1%	2.2%	0.0%	5.0%
Other	26.9%	31.1%	25.0%	24.7%
Activities Not Available Currently in PBC				
Hiking	2.1%	0.0%	1.9%	4.7%
Other (include skiing, swimming with dolphins, etc.)	5.2%	12.0%	0.0%	3.1%
Nothing	8.3%	2.1%	5.9%	21.4%

Hotel Visitor Survey: 1st Quarter 2009

Last Vacation Destination+	Total 1Q2009	Jan. 2009	Feb. 2009	Mar. 2009
Domestic	**65.1%**	**62.8%**	**66.4%**	**68.9%**
Florida	26.8%	25.3%	24.7%	30.4%
Far West	14.8%	17.6%	14.4%	12.8%
Southeast (Excluding Florida)	7.5%	4.0%	8.6%	10.9%
New England	5.8%	8.8%	5.6%	4.6%
New York	4.8%	5.2%	5.9%	3.5%
Midwest	2.7%	1.9%	2.9%	3.2%
Mid Atlantic	2.6%	0.0%	4.4%	3.5%
International	**34.0%**	**35.1%**	**33.6%**	**31.1%**
Latin America/Caribbean	14.4%	11.7%	13.3%	18.9%
Europe	14.0%	15.0%	14.6%	10.7%
England/UK	0.9%	1.1%	0.0%	1.6%
Germany	0.4%	0.8%	0.0%	0.0%
Australia/Asia	2.3%	0.8%	4.3%	1.5%
Middle East	1.8%	3.3%	1.4%	0.0%
Canada	1.5%	4.3%	0.0%	0.0%
Africa	0.0%	0.0%	0.0%	0.0%
No Answer	**0.9%**	**2.1%**	**0.0%**	**0.0%**

+ Among vacation/leisure visitors only

Hotel Visitor Survey: 1st Quarter 2009

Other Vacation Destinations Considered*+	Total 1Q2009	Jan. 2009	Feb. 2009	Mar. 2009
Domestic	**64.6%**	**64.5%**	**70.9%**	**53.9%**
Florida	59.6%	61.7%	64.9%	47.8%
Far West	5.1%	2.9%	3.2%	9.1%
Southeast (Excluding Florida)	1.0%	0.0%	2.8%	0.0%
Mid Atlantic	0.0%	0.0%	0.0%	0.0%
Midwest	0.0%	0.0%	0.0%	0.0%
New York	0.0%	0.0%	0.0%	0.0%
New England	0.0%	0.0%	0.0%	0.0%
International	**1.9%**	**0.0%**	**0.0%**	**6.0%**
Latin America/Caribbean	1.9%	0.0%	0.0%	6.0%
Australia/Asia	0.0%	0.0%	0.0%	0.0%
Europe	0.0%	0.0%	0.0%	0.0%
Germany	0.0%	0.0%	0.0%	0.0%
England/UK	0.0%	0.0%	0.0%	0.0%
Canada	0.0%	0.0%	0.0%	0.0%
Africa	0.0%	0.0%	0.0%	0.0%
Middle East	0.0%	0.0%	0.0%	0.0%
No other destinations	**35.4%**	**35.5%**	**29.1%**	**46.1%**

* Multiple responses accepted
\+ Among vacation/leisure visitors only

Hotel Visitor Survey: 1st Quarter 2009

Comparison of Palm Beach County to Last Vacation+	Total 1Q2009	Jan. 2009	Feb. 2009	Mar. 2009
Being a great place to go again and again				
Palm Beach County is much better	31.3%	31.4%	27.0%	37.6%
Palm Beach County is about the same	61.3%	57.0%	65.2%	60.4%
Palm Beach County is much worse	7.4%	11.6%	7.8%	2.0%
Being able to always find a new place to see or a new thing to do				
Palm Beach County is much better	25.9%	26.7%	23.0%	29.2%
Palm Beach County is about the same	64.1%	61.6%	65.9%	64.1%
Palm Beach County is much worse	10.0%	11.7%	11.0%	6.7%
Being appreciated as a tourist or visitor				
Palm Beach County is much better	31.3%	39.9%	24.4%	29.6%
Palm Beach County is about the same	62.4%	51.8%	69.9%	66.3%
Palm Beach County is much worse	6.3%	8.4%	5.7%	4.2%
Being a good value				
Palm Beach County is much better	30.7%	29.0%	31.9%	35.8%
Palm Beach County is about the same	61.0%	65.2%	54.1%	58.3%
Palm Beach County is much worse	8.3%	5.8%	14.0%	6.0%
Being great for historical sights and places				
Palm Beach County is much better	16.0%	18.9%	11.9%	19.0%
Palm Beach County is about the same	60.2%	51.5%	69.2%	61.2%
Palm Beach County is much worse	23.8%	29.6%	18.9%	19.8%
Being great for discovering nature-based activities/ecotourism				
Palm Beach County is much better	26.0%	35.7%	17.6%	24.5%
Palm Beach County is about the same	63.1%	50.5%	76.4%	64.5%
Palm Beach County is much worse	10.9%	13.8%	6.0%	11.0%
Being great for museums and other cultural activities				
Palm Beach County is much better	20.3%	25.8%	18.5%	18.5%
Palm Beach County is about the same	60.2%	48.3%	65.4%	66.8%
Palm Beach County is much worse	19.6%	25.8%	16.2%	14.7%

+ Among vacation/leisure visitors only

Hotel Survey: 1st Quarter 2009

Characteristics of Visitors	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Age								
Under 35	13.0%	13.5%	11.9%	13.5%	13.0%	17.5%	19.0%	16.4%
35 to 54	48.4%	42.2%	52.1%	52.1%	56.3%	56.8%	53.0%	54.5%
55 to 64	25.0%	28.0%	22.4%	24.1%	19.6%	19.0%	19.7%	20.2%
65 +	13.6%	16.4%	13.5%	10.3%	11.1%	6.8%	8.3%	9.0%
Occupation								
Professional/Managerial	60.6%	58.2%	61.4%	61.2%	63.4%	61.6%	58.5%	64.3%
Sales	16.8%	13.7%	19.0%	17.9%	12.4%	15.4%	16.3%	14.3%
Retired	13.7%	18.2%	10.4%	12.6%	12.3%	9.3%	9.3%	10.3%
Technical	4.9%	4.3%	6.6%	3.5%	7.4%	6.4%	6.6%	6.4%
Student	1.1%	1.3%	0.0%	2.3%	0.5%	0.9%	1.2%	0.4%
Other	2.9%	4.2%	2.5%	2.5%	3.9%	6.4%	8.0%	4.2%
Hispanic Origin	4.0%	5.0%	4.0%	3.5%	4.3%	6.1%	7.1%	4.1%
Ethnicity								
White/Caucasian	93.9%	96.6%	94.1%	91.1%	93.8%	91.2%	89.0%	93.4%
African-American/Black	4.2%	2.3%	5.1%	5.4%	3.3%	5.9%	8.4%	3.6%
Asian	1.7%	0.8%	0.8%	3.5%	2.8%	2.7%	2.1%	2.7%
Other	0.1%	0.4%	0.0%	0.0%	0.1%	0.3%	0.4%	0.3%

Hotel Survey: 1st Quarter 2009

Characteristics of Visitors (Continued)	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Income								
Under $45,000	3.0%	3.2%	3.2%	3.2%	1.2%	4.0%	2.8%	2.2%
$45,000 to $64,999	6.1%	5.5%	7.4%	5.3%	4.7%	8.2%	7.8%	8.9%
$65,000 to $99,999	17.5%	16.1%	17.5%	18.4%	18.8%	22.2%	24.1%	20.6%
$100,000 to $200,000	44.6%	42.4%	47.2%	43.5%	44.2%	42.6%	45.4%	44.6%
Over $200,000	28.9%	32.7%	24.6%	29.6%	31.0%	23.0%	20.0%	23.6%
Gender								
Male	57.8%	56.2%	62.1%	54.9%	59.4%	59.6%	61.2%	61.0%
Female	42.2%	43.8%	37.9%	45.1%	40.6%	40.4%	38.8%	39.0%

Hotel Survey: 1st Quarter 2009

Description of Travel Party*	Total Hotel Guests							
	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Adult family members or friends	42.0%	42.2%	40.3%	43.4%	39.3%	38.1%	40.7%	36.2%
Self Only	40.0%	39.2%	39.5%	40.7%	36.4%	39.9%	38.7%	45.1%
Business Associates	17.0%	18.8%	19.3%	13.8%	22.8%	20.5%	19.7%	17.9%
Children <12 years of age	5.4%	2.5%	4.4%	9.4%	6.3%	8.9%	7.9%	6.6%
Grandchildren <12 years of age	0.6%	0.3%	0.0%	1.5%	0.0%	0.2%	0.0%	0.3%

Description of Travel Party*	Pleasure Hotel Guests							
	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Adult family members or friends	79.5%	76.6%	87.0%	76.9%	84.6%	78.4%	81.5%	74.6%
Self Only	16.8%	21.9%	10.8%	16.2%	10.7%	16.5%	14.9%	20.2%
Children under 12 years of age	11.5%	5.6%	11.1%	17.3%	15.9%	18.3%	15.8%	15.9%
Business Associates	1.0%	0.9%	0.0%	1.7%	0.8%	1.0%	1.2%	1.2%
Grandchildren <12 years of age	1.4%	0.6%	0.0%	3.2%	0.0%	0.4%	0.0%	0.8%

Description of Travel Party*	Business Hotel Guests							
	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Self Only	59.7%	54.4%	59.4%	65.4%	50.9%	55.6%	54.7%	60.1%
Business Associates	30.0%	33.3%	31.9%	26.3%	35.1%	33.4%	32.0%	27.9%
Adult family members or friends	10.8%	13.3%	8.8%	9.2%	13.8%	11.1%	13.6%	13.0%
Children under 12 years of age	0.6%	0.0%	0.0%	2.0%	1.0%	2.6%	2.8%	1.2%
Grandchildren <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 2009

Place of Origin	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Domestic	**89.6% (n=660)**	**88.8%**	**90.6%**	**89.1%**	**91.2% (n=669)**	**89.6% (n=662)**	**87.5% (n=645)**	**84.2% (n=618)**
Florida	18.1% (n=133)	20.3%	12.7%	20.6%	12.3% (n=91)	23.8% (n=176)	25.0% (n=184)	17.6% (n=129)
Mid Atlantic	16.5% (n=122)	17.6%	20.7%	13.3%	15.3% (n=112)	9.9% (n=73)	11.9% (n=88)	12.9% (n=95)
Midwest	14.9% (n=110)	10.0%	15.1%	18.3%	18.7% (n=137)	11.8% (n=88)	10.4% (n=77)	11.8% (n=87)
Southeast (excluding Florida)	13.8% (n=102)	10.9%	14.8%	15.5%	17.3% (n=127)	19.8% (n=146)	19.2% (n=142)	17.3% (n=127)
New York	12.3% (n=90)	13.5%	13.0%	10.0%	12.8% (n=94)	10.4% (n=77)	9.2% (n=68)	9.2% (n=68)
New England	8.6% (n=63)	11.7%	7.0%	7.3%	7.1% (n=52)	6.5% (n=48)	5.9% (n=44)	7.7% (n=56)
Far West	5.4% (n=40)	4.8%	7.3%	4.0%	7.6% (n=56)	7.3% (n=54)	5.8% (n=43)	7.7% (n=56)
International	**10.4% (n=77)**	**11.2%**	**9.4%**	**10.9%**	**8.8% (n=65)**	**10.4% (n=77)**	**12.5% (n=92)**	**15.8% (n=116)**
Europe (net)	4.4% (n=33)	3.5%	5.3%	4.3%	3.4% (n=25)	4.2% (n=31)	5.8% (n=43)	6.7% (n=49)
- Germany	1.0% (n=8)	0.7%	1.6%	0.8%	0.3% (n=2)	0.9% (n=7)	1.2% (n=9)	1.7% (n=13)
- England/UK	1.0% (n=8)	0.7%	1.6%	0.8%	1.4% (n=10)	1.5% (n=11)	1.0% (n=8)	1.5% (n=11)
Canada	2.6% (n=19)	4.3%	1.6%	2.4%	3.2% (n=24)	3.0% (n=22)	2.4% (n=18)	4.1% (n=30)
Latin America / Caribbean	2.6% (n=19)	3.4%	2.1%	2.2%	1.3% (n=9)	1.9% (n=14)	3.0% (n=22)	3.1% (n=23)
Australia/Asia	0.7% (n=5)	0.0%	0.0%	2.0%	0.8% (n=6)	0.4% (n=3)	0.3% (n=2)	1.0% (n=7)
Africa	0.1% (n=1)	0.0%	0.4%	0.0%	0.0% (n=0)	0.0% (n=0)	0.4% (n=3)	0.4% (n=3)
Middle East	0.0% (n=0)	0.0%	0.0%	0.0%	0.1% (n=1)	0.9% (n=7)	0.6% (n=4)	0.5% (n=4)

Hotel Survey: 1st Quarter 2009

Pleasure Vs. Business By Selected Place of Origin	Total 1Q 2009	Jan.	Feb.	Mar.	Total 1Q 2008	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008
Florida	**18.1%**	**20.3%**	**12.7%**	**20.6%**	**12.3%**	**23.8%**	**25.0%**	**17.6%**
Business	11.8%	14.8%	10.2%	9.3%	9.5%	15.3%	14.1%	11.4%
Pleasure	6.1%	5.3%	2.4%	10.9%	2.9%	8.3%	10.1%	6.1%
Mid Atlantic	**16.5%**	**17.6%**	**20.7%**	**13.3%**	**15.3%**	**9.9%**	**11.9%**	**12.9%**
Business	6.5%	6.6%	8.6%	5.6%	7.1%	4.1%	6.0%	7.4%
Pleasure	9.6%	10.7%	11.4%	7.3%	8.0%	5.7%	6.0%	5.4%
Midwest	**14.9%**	**10.0%**	**15.1%**	**18.3%**	**18.7%**	**11.8%**	**10.4%**	**11.8%**
Business	7.9%	4.9%	10.6%	6.9%	12.0%	7.4%	6.7%	6.7%
Pleasure	7.1%	4.9%	4.5%	11.3%	6.8%	4.2%	3.8%	5.2%
Southeast (excluding Florida)	**13.8%**	**10.9%**	**14.8%**	**15.5%**	**17.3%**	**19.8%**	**19.2%**	**17.3%**
Business	10.0%	8.6%	11.4%	10.1%	13.4%	13.8%	12.6%	13.4%
Pleasure	3.8%	2.0%	3.3%	5.6%	4.0%	5.8%	6.3%	3.7%
New York	**12.3%**	**13.5%**	**13.0%**	**10.0%**	**12.8%**	**10.4%**	**9.2%**	**9.2%**
Business	3.5%	4.1%	4.1%	2.8%	6.1%	3.8%	3.8%	4.4%
Pleasure	8.7%	9.4%	9.0%	7.3%	6.5%	6.5%	5.3%	4.8%
New England	**8.6%**	**11.7%**	**7.0%**	**7.3%**	**7.1%**	**6.5%**	**5.9%**	**7.7%**
Business	3.7%	7.0%	2.9%	2.0%	4.0%	2.2%	2.6%	3.8%
Pleasure	4.9%	4.9%	4.1%	5.2%	3.0%	4.5%	3.1%	3.8%
Far West	**5.4%**	**4.8%**	**7.3%**	**4.0%**	**7.6%**	**7.3%**	**5.8%**	**7.7%**
Business	4.1%	2.9%	5.7%	3.6%	5.6%	5.5%	4.3%	5.3%
Pleasure	1.2%	2.0%	1.6%	0.0%	2.0%	1.6%	13.6%	2.2%