



# Report on Palm Beach County Tourism Second Quarter 2007 (April, May and June)

Prepared for:  
Tourist Development Council of Palm Beach County

Prepared by:  
**PROFILE**  
MARKETING RESEARCH  
4020 S. 57<sup>th</sup> Avenue  
Lake Worth, FL 33463  
(561)965-8300  
[www.profile-mktg-res.com](http://www.profile-mktg-res.com)

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## Introduction: 2<sup>nd</sup> Quarter 2007

### Background

- The following report contains information collected during the 2<sup>nd</sup> Quarter of 2007 (April, May and June), the third quarter of Fiscal Year 2006/2007.
- 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: 2<sup>nd</sup> Quarter 2007

## Occupancy Rates

- **The average occupancy rate for Palm Beach County surveyed hotels during the second quarter of 2007 was 68.5%, a 12.3 percentage point decrease compared to last quarter (80.8%) and a 2.5 percentage point decrease compared to the second quarter of 2006 (71.0%).**
  - The average occupancy rate in 2Q2007 among properties with 101+ rooms (69.5%) was higher than the average occupancy rate among properties with 50-100 rooms (62.3%).
- **Hotels in the Southern region reported the lowest average occupancy rate (66.2%) during 2Q2007, while hotels in the Northern and Central regions reported comparable average occupancy rates (70.3% Northern and 70.0% Central).**
  - Compared to 2Q2006, the average occupancy rate decreased among properties in the Northern and Southern regions by 2.8 and 4.3 percentage points, respectively (Northern – from 73.1% to 70.3% and Southern – from 70.5% to 66.2%). The average occupancy rate among properties in the Central region 2Q2007 (70.0%) was comparable with 2Q2006 (70.6%).
  - All regions reported decreases in occupancy rates compared to last quarter.
  - **The estimated number of hotel room nights occupied during the second quarter of 2007 was 935,524 – a decrease of 135,210 rooms nights compared to the prior quarter (1,070,734) and a decrease of 29,268 room nights compared to 2Q2006 (964,792).**
- **According to hotel managers who responded, 3.4% of guests staying at Palm Beach County hotels during the second quarter of 2007 were from foreign locations. This is comparable with the prior quarter (3.0%) and the second quarter of 2006 (2.8%).**
  - Smaller hotels (50-100 rooms) reported that 6.2% of guests were international travelers, while larger properties (101 + rooms) reported that 2.8% came from countries other than the US.
  - Among larger properties, the percentage of international guests was 2.6% in properties with 101-219 rooms and 1.5% in properties with 220-500 rooms.
  - As seen last quarter (4.9%) and in 2Q2006 (3.9%), properties in the Southern region continued to report the highest percentage of international guests in 2Q2007 (5.0%).
- **During 2Q2007, hotel room nights were almost equally occupied by leisure travelers (35.1%), business travelers (32.9%) and convention/group travelers (31.9%).**
- **Hotels designated as convention hotels reported that 34.9% of their bookings were made by convention/group travelers. This represents an increase of 5.5 percentage points compared to last quarter (29.4%) and is at parity with the same quarter last year (36.1%).**

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



# Property Manager Survey: 2<sup>nd</sup> Quarter 2007

## Average Daily Room Rate (ADR)

- **The ADR in 2Q2007, as reported by participating Palm Beach County property managers, was \$146.19 – this represents a 2.3% (\$3.23) increase compared to the same quarter last year (\$142.96) and a 28.5% (\$58.14) decrease compared to the previous quarter (\$204.33).**
  - Smaller properties (50-100 rooms) reported a 2.6% increase in ADR compared to the same quarter last year (from \$117.22 to \$120.28) and a 37.4% decrease compared to last quarter (\$192.28). Larger properties had comparable ADRs in 2Q2006 (\$146.99) and 2Q2007 (\$149.60), but reported a 27.5% decrease in ADR compared to the previous quarter (\$206.22).
  - Among larger properties, hotels with 101-219 rooms reported an ADR of \$100.58 (comparable with 2Q2006, \$101.80) and hotels with 220-500 rooms reported an ADR of \$167.44 (a 5.3% increase from 2Q2006, \$159.02). Both hotels with 101-219 rooms and hotels with 220-500 rooms reported decreases in ADR compared to last quarter (30.3%, hotels with 101-219 rooms and 19.8%, hotels with 220-500 rooms).

## Future Business Outlook

- **In terms of future business outlook for the next two months as compared to the same months last year, the percentage of surveyed hotel managers expecting an increase in total room revenue and those expecting a decrease were comparable (40.3% - increase, 40.5% - decrease). Only, 19.1% percent of surveyed managers anticipate no change.**
  - Among hotel managers expecting an increase in room revenue compared to the previous year, the average increase expected is 6.3%.
  - Among hotel managers expecting a decrease in room revenue compared to the previous year, the average decrease expected is 8.3%.
- **When predicting changes in room revenue for the following third and fourth months compared to the same months last year, 36.2% of surveyed managers expect a decrease in total room revenue, 31.2% expect no change and 32.6% anticipate an increase.**
  - Among hotel managers anticipating an increase in room revenue compared to the previous year, the average increase expected is 7.0%.
  - Among hotel managers anticipating a decrease in room revenue compared to the previous year, the average decrease expected is 8.0%.

## Bookings Via Third Party Websites

- **According to surveyed hotel managers, during 2Q2007, 14.0% of bookings were sold through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc). This represents a 2.7 percentage point increase compared to 1Q2007 (11.3%) and is comparable with the second quarter of last year (13.5%).**
  - Smaller properties (50-100 rooms) reported a higher percentage of bookings sold via third party websites (29.7%) than larger properties (101+ rooms) (10.0%).



# Hotel Visitor Survey: 2<sup>nd</sup> Quarter 2007

## Characteristics of Stay

- The average party size of surveyed hotel guests in the second quarter of 2007 was 2.1\*, the same as last quarter and at parity with 2Q2006 (2.2). The median party size for 2Q2007 and for all months within the quarter was 2.0.
- On average, surveyed hotel guests stayed 3.0 nights in a Palm Beach County hotel and occupied 1.3 rooms per night\*.
  - Shorter hotel stays were reported in 2Q2007 (3.0 nights on average) than in 1Q2007 (3.3 on average) and 2Q2006 (3.4 on average).

## Planning the Trip to Palm Beach County

- During the second quarter of 2007, more than one-half (54.2%) of surveyed visitors described themselves as business travelers (conference/convention/business meeting), while 38.6% considered themselves leisure travelers.
  - Compared to the same time last year, the percentage of business travelers decreased from 63.3% to 54.2% (down 9.1 percentage points), while the percentage of vacationers increased from 31.5% to 38.6% (up 7.1 percentage points).
  - The percentage of vacationers also increased compared to last quarter (by 3.7 percentage points), from 34.9% to 38.6%, while the percentage of business travelers was comparable with 1Q2007 (55.1%).
- Just over one-half of 2Q2007 surveyed visitors reported that they selected PBC over other destinations due to a work related trip (51.6%). Visitors also frequently cited 'visit friends/relatives' (22.8%) and 'previous visit' (11.9%).
  - Compared to 2Q2006 and 1Q2007, mention of 'work related trip' (51.6%) decreased by 10.0 and 3.3 percentage points, respectively (61.6% in 2Q2006, 54.9% in 1Q2007).
- In 2Q2007, 49.6% of surveyed guests reported that the decision to come to PBC was made by their employers, while 41.3% claimed that the head of the household/other adult made the decision.
  - Visitors surveyed in 2Q2007 were less likely to claim that their employer was the decision maker with regard to the trip to PBC (49.6%) than their counterparts in 2Q2006 (62.7%) and 1Q2007 (54.1%).
- More than one-half of surveyed guests (54.3%) planned their trip to Palm Beach County one month or less in advance.

## Booking a Trip to Palm Beach County

- Use of a travel agent to book part of visitors' trips to PBC during the second quarter of 2007 (24.5%) remained relatively the same compared to last quarter (23.7%) and the second quarter of 2006 (25.6%).
- Use of the Internet among surveyed visitors to book any part of their trip to PBC (48.8%) increased compared to last quarter (44.9%) and the second quarter of last year (46.0%).
  - Among those hotel guests who used the Internet to book part of their trip, most used it to book hotel rooms (73.8%), airfare (62.4%), and/or car rentals (40.1%).
  - In 2Q2007, use of the Internet to book airfare (62.4%) decreased considerably compared to 1Q2007 (76.1%, down 13.7 percentage points) and 2Q2006 (74.2%, down 11.8 percentage points).

\* 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: 2<sup>nd</sup> Quarter 2007

## Booking a Trip to Palm Beach County (Continued)

- Conversely, use of the Internet to book hotel rooms (73.8%) increased compared to last quarter (64.8%, a 9.0 percentage point increase) and the second quarter of last year (61.3%, a 12.5 percentage point increase).
- Use of hotel websites to book accommodations increased in 2Q2007 (38.2%) by 9.8 percentage points compared to 1Q2007 (28.4%) and by 10.6 percentage points compared to 2Q2006 (27.6%).
- Eight percent of surveyed visitors claimed that their trip to Palm Beach County in 2Q2007 was part of a package (that may have included airfare, lodging, meal, rental car, etc).

## Visitor Expenditures

- **The average expenditure, per party\*, in Palm Beach County in the second quarter of 2007 was \$1,296. This represents a decrease of \$400 (23.6%) compared to last quarter (\$1,696) and a decrease of \$159 (10.9%) compared to the second quarter of last year (\$1,455).**
  - Compared to 2Q2006, there have been decreases in 'Lodging' (from \$826 to \$675, an 18.3% decrease), 'Gifts/Shopping' (from \$133 to \$93, a 30.1% decrease) and 'Local Travel' (from \$143 to \$123, a 14.0%).
  - Except for 'Restaurant/Bar' and 'Gifts/Shopping' (remained at parity), all other spending categories experienced decreases compared to last quarter.
  - **The average per person expenditure also declined in 2Q2007 (\$617) compared to 1Q2007 (\$808, a 23.6% decrease) and the same quarter last year (\$661, a 6.7% decrease).**
- **In 2Q2007, vacation/pleasure visitors continued to spend more (\$1,575) in Palm Beach County than business visitors (\$1,048) – a difference of \$527.**
  - Vacationers' per party expenditures in 2Q2007 decreased by 30.6% compared to last quarter (\$2,271) and by 21.0% compared to 2Q2006 (\$1,993).
  - Business travelers' per party expenditures decreased by 23.3% compared to last quarter (\$1,366) and by 10.4% compared to 2Q2006 (\$1,169).

## Characteristics of Visitors

- The vast majority of surveyed hotels guests were White/Caucasian (91.4%) and more than one-half were between the ages of 35 and 54 (55%).
- More than six-in-ten (63.7%) claimed to have professional/managerial occupations and an annual household income of \$100,000 or greater (65.5%).
- In 2Q2007, most leisure travelers claimed to be traveling with 'adult family member/friends' (83.8%), while business travelers were usually traveling alone (47.7%) or with business associates (38.9%).

## Travel Details

- First time visitors to Palm Beach County represented 24.3% of surveyed hotels guests in 2Q2007.
- Almost nine-in-ten surveyed visitors claimed that Palm Beach County was their main destination (87.4%).

\* 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: 2<sup>nd</sup> Quarter 2007

## Travel Details (continued)

- The percentage of surveyed guests who traveled by air to come to PBC (72.2%) decreased by 8.0 percentage points compared to last quarter (80.2%) and by 7.9 percentage points compared to 2Q2006 (80.1%).

## Attitudes toward Palm Beach County

- In 2Q2007, surveyed visitors to PBC continued to report that the aspects of the trip to PBC they liked best were 'climate/weather' (36.9%), 'beaches' (13.5%) and 'beautiful area' (8.4%).
- When asked what they liked least about the trip to PBC, 2Q2007 surveyed visitors most often cited 'traffic/bad drivers' (33.4%) and 'Humidity/poor weather' (15.3%), as seen in previous quarters.
- 2Q2007 surveyed visitors most often mentioned that next time they visit PBC, it would make their trip better if they could stay longer (20.3%), the weather conditions were better (11.1%) and they could have more free time (10.7%).

## Activity Participation

- Eating at area restaurants continued to be the most popular activity enjoyed by surveyed visitors while visiting Palm Beach County (93.7%).
- Visitors also frequently mentioned shopping (32.1%), going to the beach (31.8%) and swimming (18.0%).

## Return Visits

- More than eight-in-ten surveyed guests (83.8%) stated that they have plans to return to Palm Beach County in the future.
  - Among those who plan to visit Palm Beach County in the future, 72.8% plan to do so in the next year; 34.4% within the next three months.
  - Only 2.6% of surveyed guests have no plans to return to PBC. The most frequently mentioned reasons provided for such were 'no business in the area' (16.3%), 'going to other places/I like changing destinations' (15.9%) and 'too expensive' (14.9%).

## Influence of Travel Rising Costs

- The percentage of those who stated that the rising cost of transportation, due to rising fuel costs, would not affect their decision to come to Palm Beach County (54.2%, rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all) increased slightly by 2.7 percentage points compared to 1Q2007 (51.5%) and decreased by 4.3 percentage points compared to 2Q2006 (58.5%). The percentage of those who would strongly consider changing their plans remained consistent with last quarter and the second quarter of last year (10.7% in 2Q2007, 9.4% in 1Q2007 and 9.8% in 2Q2006).
- Fifty two point six percent of surveyed guests reported that generally increasing travel costs would not influence their decision to come to PBC (rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). This represents a 3.6 percentage point increase compared to last quarter (49.0%) but it is comparable with 2Q2006 (53.2%).



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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: 2<sup>nd</sup> Quarter 2007

	<u>Total 2Q 2007</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2006</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>
<b>Occupancy Rate</b>								
Month/Quarter	68.5%	73.8%	65.7%	65.6%	71.0%	56.9%	64.6%	80.8%
Weekends within the month**	66.8%	73.1%	65.0%	64.0%	N/A	N/A	N/A	N/A
Weekdays within the month**	67.4%	74.0%	65.0%	64.2%	N/A	N/A	N/A	N/A
FYTD (Oct. - Set.)	71.2%	72.8%	71.9%	71.2%	76.0%	71.2%	64.6%	72.7%
<b>Room Nights Occupied<sup>1*</sup></b>								
Month/Quarter	935,524	336,329	308,010	291,185	964,792	769,629	858,302	1,070,734
FYTD (Oct. - Set.)	2,864,560	2,265,365	2,573,375	2,864,560	3,060,175	3,829,804	858,302	1,929,036
<b>Percentage of Room Nights Occupied</b>								
Leisure	35.1%	35.0%	36.1%	34.3%	37.5%	39.8%	38.6%	41.5%
Business	32.9%	34.0%	31.5%	33.4%	32.0%	35.3%	36.7%	31.9%
Convention/Group	31.9%	31.0%	32.4%	32.3%	30.5%	24.9%	24.7%	26.6%
<b>Average Daily Room Rate<sup>2</sup></b>	\$146.19	\$177.15	\$134.96	\$119.67	\$142.96	\$104.60	\$134.03	\$204.33

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

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: 2<sup>nd</sup> Quarter 2007

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>99/00</u>	<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>
2nd Quarter (April/May/June)	N/A	N/A	65.1	67.0	71.8	72.7	71.0	68.5
April	71.9	71.9	71.1	72.0	79.7	79.1	73.6	73.8
May	67.9	65.8	62.9	65.6	67.5	68.5	70.8	65.7
June	63.0	63.2	61.1	63.7	67.7	70.0	68.9	65.6
3rd Quarter (July/August/Sept.)	N/A	N/A	57.3	57.8	64.2	63.0	56.9	N/A
4th Quarter (Oct/Nov/Dec)	N/A	N/A	57.5	59.8	64.2	79.8	73.1	64.6
1st Quarter (Jan/Feb/Mar)	N/A	N/A	76.2	77.9	83.8	88.3	84.7	80.8
<b>Fiscal YTD (Oct. – Sept.)</b>	<b>68.8</b>	<b>67.3</b>	<b>64.1</b>	<b>65.7</b>	<b>70.9</b>	<b>76.0</b>	<b>71.2</b>	<b>71.2</b>
<b>Number of Room Nights Occupied in 2<sup>nd</sup> Quarter*</b>							964,792	935,524

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



# Property Manager Survey: 2<sup>nd</sup> Quarter 2007

	<u>Total 2Q 2007</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2006</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 2Q 2007</u>
<b>Conference/Convention Bookings</b>								
<u>All Hotels</u>								
% Occupied Room Nights in County	31.9%	31.0%	32.4%	32.3%	30.5%	24.9%	24.7%	26.6%
Occupied Room Nights in County	298,110	104,262	99,795	94,053	299,502	191,074	212,303	284,042
Occupied Room Nights in County FYTD (Oct.- Sept.)	794,455	600,607	700,402	794,455	893,664	1,084,738	212,303	496,345
<u>Convention Hotels</u>								
% Occupied Room Nights	34.9%	32.9%	36.0%	36.1%	36.1%	30.4%	31.7%	29.4%
Occupied Room Nights	213,173	72,349	73,158	67,666	213,971	138,862	163,663	199,451
Occupied Room Nights FYTD (Oct.- Sept.)	576,287	435,463	508,621	576,287	584,328	723,190	163,663	363,114
<b>Available Inventory*</b>								
Rooms in County	45,110	15,191**	15,123**	14,796**	44,737	44,014	43,380	44,219
Room Nights	1,368,423	455,730	468,813	443,880	1,357,026	1,349,968	1,330,320	1,326,854
Room Nights FYTD (Oct.- Sept.)	4,025,597	3,112,904	3,581,717	4,025,597	4,028,742	5,378,710	1,330,320	2,657,174
<b>Response Rate</b>								
Month/Quarter (for all hotels in County)	60.3%	61.8%	60.9%	58.2%	60.0%	61.5%	61.8%	62.3%
FYTD (Oct.- Sept.)	61.5%	62.1%	61.9%	61.5%	58.3%	59.1%	61.8%	62.1%

\* 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: 2<sup>nd</sup> Quarter 2007

Occupancy Rate	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Size of Hotel</b>								
50 - 100 Rooms	62.3%	66.0%	60.8%	60.4%	69.3%	52.9%	60.9%	80.5%
101 + Rooms	69.5%	75.0%	66.5%	66.5%	71.3%	57.4%	65.2%	80.8%
101-219	68.5%	74.2%	65.7%	65.3%	68.2%	58.1%	65.5%	81.0%
220-500	71.2%	75.6%	68.0%	69.2%	76.9%	57.9%	65.8%	81.0%
All Properties	68.5%	73.8%	65.7%	65.6%	71.0%	56.9%	64.6%	80.8%
<b>Geographic Region</b>								
North	70.3%	73.9%	67.6%	69.2%	73.1%	55.7%	59.8%	78.1%
Central	70.0%	73.9%	67.1%	68.9%	70.6%	61.1%	65.5%	82.8%
South	66.2%	73.7%	62.9%	61.6%	70.5%	53.5%	65.9%	80.5%

What percent of your occupancy is international?	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Size of Hotel</b>								
50-100 Rooms	6.2%	8.9%	4.8%	4.5%	3.6%	2.5%	4.5%	5.9%
101 + Rooms	2.8%	3.4%	2.5%	2.5%	2.6%	2.7%	2.6%	2.6%
101-219	2.6%	3.2%	2.1%	2.4%	2.8%	3.2%	2.6%	2.3%
220-500	1.5%	1.7%**	1.9%	1.0%**	1.2%	0.7%	1.3%	2.4%
All Properties	3.4%	4.1%	2.9%	3.2%	2.8%	2.8%	2.8%	3.0%
<b>Geographic Region</b>								
North	3.8%	5.9%**	4.5%	2.0%**	1.2%	1.2%	3.2%	1.8%
Central	2.1%	2.9%	1.7%	1.6%	2.6%	2.3%	2.8%	2.4%
South	5.0%	5.5%	2.7%	5.1%	3.9%	4.3%	2.7%	4.9%

\* Caution: Extremely low base



## Property Manager Survey: 2<sup>nd</sup> Quarter 2007

Average Daily Room Rate	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Size of Hotel</b>								
<u>50 - 100 Rooms</u>	\$120.28	\$149.31	\$107.88	\$104.70	\$117.22	\$94.91	\$120.10	\$192.28
<u>101 + Rooms</u>	\$149.60	\$180.92	\$138.90	\$121.98	\$146.99	\$106.04	\$136.06	\$206.22
101-219	\$100.58	\$115.30	\$95.57	\$87.60	\$101.80	\$85.25	\$92.56	\$144.39
220-500	\$167.44	\$196.13	\$155.91	\$139.70	\$159.02	\$109.37	\$134.95	\$208.85
<u>All Properties</u>	\$146.19	\$177.15	\$134.96	\$119.67	\$142.96	\$104.60	\$134.03	\$204.33



# Property Manager Survey: 2<sup>nd</sup> Quarter 2007

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
<b>2Q</b>		
2005	969,020+	
2006	964,792	- 0.4
2007	935,524	- 3.0
<b>April</b>		
2005	346,363+	
2006	329,102	- 5.0
2007	336,329	2.2
<b>May</b>		
2005	309,946+	
2006	327,376	5.6
2007	308,010	- 5.9
<b>June</b>		
2005	312,711+	
2006	308,314	- 1.4
2007	291,185	- 5.6
<b>3Q</b>		
2005	862,035+	
2006	769,629	- 10.7
2007		
<b>4Q</b>		
2005	956,948+	
2006	858,302	- 10.3
2007		
<b>1Q</b>		
2005	1,173,859+	
2006	1,138,435	- 3.0
2007	1,070,734	- 5.9
<b>FYTD (October – June)</b>		
2005	3,195,241+	
2006	3,060,175	- 4.2
2007	2,864,560	- 6.4

+ 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: 2<sup>nd</sup> Quarter 2007

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>
<b>May 2007 / June 2007 predictions from April</b>			
<b>Foresee Decrease</b>	44.4%	26.8%	29.0%
Average decrease (among those who foresee decrease)	7.4%	5.4%	7.1%
<b>Foresee No Change</b>	12.3%	30.3%	51.6%
<b>Foresee Increase</b>	43.3%	42.8%	19.3%
Average increase (among those who foresee increase)	4.4%	6.3%	6.0%
<b>June 2007 / July 2007 predictions from May</b>			
<b>Foresee Decrease</b>	41.6%	32.9%	37.9%
Average decrease (among those who foresee decrease)	10.8%	7.8%	5.9%
<b>Foresee No Change</b>	12.5%	23.0%	32.0%
<b>Foresee Increase</b>	45.9%	44.1%	30.1%
Average increase (among those who foresee increase)	8.6%	9.7%	14.0%
<b>July 2007 / August 2007 predictions from June</b>			
<b>Foresee Decrease</b>	36.3%	31.8%	41.7%
Average decrease (among those who foresee decrease)	6.2%	7.1%	8.1%
<b>Foresee No Change</b>	32.6%	30.8%	40.8%
<b>Foresee Increase</b>	31.1%	37.4%	17.5%
Average increase (among those who foresee increase)	5.9%	5.7%	4.6%
<b>Second Quarter predictions from April, May and June</b>			
<b>Foresee Decrease</b>	40.5%	30.2%	35.9%
Average decrease (among those who foresee decrease)	8.3%	6.9%	7.0%
<b>Foresee No Change</b>	19.1%	27.7%	41.3%
<b>Foresee Increase</b>	40.3%	42.1%	22.7%
Average increase (among those who foresee increase)	6.3%	7.3%	9.2%



## Property Manager Survey: 2<sup>nd</sup> Quarter 2007

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>
<b>July 2007 / August 2007 predictions from April</b>			
<b>Foresee Decrease</b>	50.2%	34.2%	37.1%
Average decrease (among those who foresee decrease)	7.1%	5.8%	6.2%
<b>Foresee No Change</b>	19.3%	40.0%	46.1%
<b>Foresee Increase</b>	30.5%	25.8%	16.8%
Average increase (among those who foresee increase)	6.1%	5.1%	9.0%
<b>August 2007 / September 2007 predictions from May</b>			
<b>Foresee Decrease</b>	30.9%	34.9%	43.0%
Average decrease (among those who foresee decrease)	9.6%	7.0%	6.0%
<b>Foresee No Change</b>	39.2%	33.3%	32.0%
<b>Foresee Increase</b>	29.9%	31.8%	25.0%
Average increase (among those who foresee increase)	9.5%	12.9%	13.4%
<b>September 2007 / October 2007 predictions from June</b>			
<b>Foresee Decrease</b>	28.7%	23.6%	39.7%
Average decrease (among those who foresee decrease)	8.0%	8.2%	9.2%
<b>Foresee No Change</b>	34.0%	34.3%	48.2%
<b>Foresee Increase</b>	37.3%	42.1%	12.1%
Average increase (among those who foresee increase)	6.1%	5.6%	5.0%
<b>Second Quarter predictions from April, May and June</b>			
<b>Foresee Decrease</b>	36.2%	31.0%	40.2%
Average decrease (among those who foresee decrease)	8.0%	6.9%	7.0%
<b>Foresee No Change</b>	31.2%	35.6%	41.4%
<b>Foresee Increase</b>	32.6%	33.4%	18.4%
Average increase (among those who foresee increase)	7.0%	8.0%	10.1%



## Property Manager Survey: 2<sup>nd</sup> Quarter 2007

Bookings via third party website	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Size of Hotel</b>								
<u>50 - 100 Rooms</u>	29.7%	26.4%	32.2%	24.6%	12.4%	20.7%	26.4%	22.0%
<u>101 + Rooms</u>	10.0%	8.2%	13.0%	8.5%	12.6%	12.9%	10.7%	8.4%
101-219	11.1%	8.7%	14.7%	9.4%	14.9%	13.9%	11.5%	9.5%
220-500	6.5%	7.3%	7.1%	4.9%	4.9%	9.6%	7.5%	4.5%
<u>All Properties</u>	14.0%	12.2%	16.9%	12.6%	13.5%	15.6%	14.5%	11.3%



# 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: 2<sup>nd</sup> Quarter 2007

Characteristics of Stay	Total <u>2Q</u> 2007	<u>April</u>	<u>May</u>	<u>June</u>	Total <u>2Q</u> 2006	Total <u>3Q</u> 2006	Total <u>4Q</u> 2006	Total <u>1Q</u> 2007
Average Party Size *	2.1	2.3	2.0	2.1	2.2	2.0	2.0	2.1
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.1	3.4	3.0	2.8	3.6	3.3	3.5	3.5
Nights in Hotel	3.0	3.3	2.9	2.7	3.4	3.2	3.4	3.3
Rooms per Night *	1.3	1.3	1.3	1.3	1.4	1.3	1.4	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: 2<sup>nd</sup> Quarter 2007

Visitor Expenditures	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Average Expenditure Per Visit</b>								
Lodging	\$675	\$884	\$621	\$532	\$826	\$554	\$714	\$1,043
Restaurant/Bar	\$360	\$472	\$348	\$262	\$323	\$243	\$320	\$353
Gifts/Shopping	\$93	\$139	\$75	\$62	\$133	\$93	\$122	\$96
Entertainment/Recreation	\$45	\$66	\$38	\$27	\$31	\$38	\$65	\$63
Local Travel	\$123	\$152	\$122	\$92	\$143	\$122	\$129	\$142
Total Per Party	\$1,296	\$1,713	\$1,204	\$975	\$1,455	\$1,050	\$1,350	\$1,696
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$617	\$745	\$602	\$464	\$661	\$525	\$675	\$808
Total Per Person/Per Day	\$206	\$226	\$208	\$172	\$195	\$164	\$199	\$245
Lodging	\$107	\$117	\$107	\$94	\$110	\$87	\$105	\$150
Restaurant/Bar	\$57	\$62	\$60	\$46	\$43	\$38	\$47	\$51
Gifts/Shopping	\$15	\$18	\$13	\$11	\$18	\$15	\$18	\$14
Entertainment/Recreation	\$7	\$9	\$7	\$5	\$4	\$6	\$10	\$9
Local Travel	\$20	\$20	\$21	\$16	\$19	\$19	\$19	\$20

- 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: 2<sup>nd</sup> Quarter 2007

Visitor Expenditures	Pleasure							
	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Average Expenditure Per Visit</b>								
Lodging	\$809	\$1,124	\$719	\$589	\$1,051	\$675	\$882	\$1,320
Restaurant/Bar	\$403	\$556	\$314	\$310	\$449	\$328	\$463	\$484
Gifts/Shopping	\$158	\$200	\$162	\$102	\$269	\$234	\$320	\$197
Entertainment/Recreation	\$81	\$112	\$66	\$53	\$66	\$101	\$107	\$82
Local Travel	\$126	\$168	\$112	\$87	\$152	\$125	\$164	\$189
<b>Total Per Party</b>	<b>\$1,575</b>	<b>\$2,160</b>	<b>\$1,373</b>	<b>\$1,141</b>	<b>\$1,993</b>	<b>\$1,463</b>	<b>\$1,935</b>	<b>\$2,271</b>
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$583	\$771	\$549	\$439	\$687	\$542	\$744	\$909
Total Per Person/Per Day	\$167	\$193	\$166	\$142	\$176	\$139	\$182	\$222
Lodging	\$86	\$100	\$87	\$73	\$93	\$64	\$83	\$129
Restaurant/Bar	\$43	\$50	\$38	\$38	\$40	\$31	\$43	\$47
Gifts/Shopping	\$17	\$18	\$20	\$13	\$24	\$22	\$30	\$19
Entertainment/Recreation	\$9	\$10	\$8	\$7	\$6	\$10	\$10	\$8
Local Travel	\$13	\$15	\$14	\$11	\$13	\$12	\$15	\$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: 2<sup>nd</sup> Quarter 2007

Visitor Expenditures	Business							
	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Average Expenditure Per Visit</b>								
Lodging	\$553	\$643	\$551	\$487	\$704	\$502	\$648	\$879
Restaurant/Bar	\$313	\$370	\$356	\$230	\$257	\$209	\$270	\$280
Gifts/Shopping	\$48	\$83	\$31	\$36	\$65	\$41	\$62	\$42
Entertainment/Recreation	\$20	\$28	\$23	\$10	\$12	\$17	\$47	\$50
Local Travel	\$115	\$123	\$125	\$96	\$130	\$119	\$115	\$115
<b>Total Per Party</b>	<b>\$1,048</b>	<b>\$1,245</b>	<b>\$1,087</b>	<b>\$859</b>	<b>\$1,169</b>	<b>\$887</b>	<b>\$1,141</b>	<b>\$1,366</b>
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$616	\$732	\$679	\$477	\$687	\$555	\$634	\$759
Total Per Person/Per Day	\$246	\$293	\$261	\$199	\$222	\$191	\$204	\$271
Lodging	\$130	\$151	\$133	\$113	\$134	\$108	\$116	\$174
Restaurant/Bar	\$74	\$87	\$86	\$53	\$49	\$45	\$48	\$56
Gifts/Shopping	\$11	\$19	\$8	\$8	\$12	\$9	\$11	\$8
Entertainment/Recreation	\$5	\$6	\$6	\$2	\$2	\$4	\$8	\$10
Local Travel	\$27	\$29	\$30	\$22	\$25	\$26	\$21	\$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: 2<sup>nd</sup> Quarter 2007

Planning the Trip to Palm Beach County	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Reason for Trip</b>								
Conference/Convention/ Business Meeting	54.2%	47.2%	60.8%	54.1%	63.3%	65.8%	72.2%	55.1%
- Business Meeting	47.5%	42.8%	53.8%	45.3%	54.0%	59.1%	60.7%	49.1%
- Conference/Convention	6.2%	3.6%	6.5%	8.5%	7.3%	4.8%	10.2%	5.7%
- Other Business	0.5%	0.8%	0.5%	0.4%	2.0%	1.8%	1.3%	0.3%
Vacation/Pleasure	38.6%	44.0%	35.2%	37.3%	31.5%	24.9%	21.5%	34.9%
Sporting Event	1.8%	2.4%	1.5%	1.6%	1.8%	2.4%	3.0%	4.4%
Cultural Event/Attraction	1.3%	2.8%	0.7%	0.5%	0.5%	0.7%	0.4%	0.8%
Film/TV location scouting/production	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.4%
Other	4.0%	3.6%	1.9%	6.5%	2.8%	6.0%	3.0%	3.4%
<b>Who Made the Decision*</b>								
Employer	49.6%	47.6%	55.1%	47.0%	62.7%	61.6%	67.0%	54.1%
Head of Household/ Other adult	41.3%	46.3%	36.3%	40.3%	31.8%	32.7%	26.3%	40.5%
Family Living in PBC	10.1%	7.5%	9.6%	13.5%	5.8%	5.7%	6.4%	6.8%
Children Influenced Decision	1.5%	0.9%	0.7%	2.6%	1.1%	1.4%	0.5%	0.8%
<b>Advanced Planning</b>								
One Month or Less	54.3%	51.1%	58.3%	53.4%	56.6%	70.0%	59.9%	52.1%
2 to 3 Months	21.8%	26.8%	16.8%	21.2%	24.8%	16.6%	22.1%	23.2%
More than 3 Months	23.9%	22.1%	24.9%	25.4%	18.5%	13.5%	18.0%	24.7%

\* Multiple responses accepted.



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Planning the Trip to Palm Beach County (Continued)	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Reasons for Selecting Palm Beach County Over Other Destinations*</b>								
Work Related Trip	51.6%	46.9%	57.7%	49.8%	61.6%	62.8%	68.6%	54.9%
Visit Friends/Relatives	22.8%	23.0%	23.5%	22.6%	19.1%	17.4%	14.2%	19.5%
Previous Visit	11.9%	15.1%	11.1%	10.3%	8.6%	11.1%	9.3%	14.2%
Special Event	7.5%	8.8%	4.2%	9.4%	6.9%	3.9%	5.4%	7.4%
Weather	6.0%	7.5%	5.4%	5.4%	8.6%	3.2%	2.2%	9.3%
Convenient Flights	5.6%	6.7%	7.9%	2.9%	7.1%	5.8%	3.2%	8.9%
Beaches	5.4%	6.3%	3.5%	6.7%	6.5%	3.0%	2.1%	7.5%
Golf/Tennis/Recreation	2.8%	1.7%	3.9%	2.9%	3.0%	1.7%	2.9%	3.3%
Friends/Relatives recommendation	2.3%	2.9%	2.5%	1.8%	4.1%	2.3%	1.4%	3.2%
Compete in Sporting Event	1.4%	1.3%	2.0%	0.8%	0.7%	0.1%	0.2%	1.4%
Hotel Brochure/Website	1.3%	0.4%	2.2%	1.2%	1.5%	0.4%	1.4%	2.2%
Art/Cultural Event	1.1%	0.8%	0.7%	1.7%	1.0%	1.2%	0.6%	0.9%
Attraction Brochure/Website	1.1%	0.8%	0.7%	1.8%	0.8%	0.4%	0.5%	0.7%
PBC-CVB Information/Website	1.1%	1.7%	0.3%	1.2%	0.1%	0.1%	0.0%	0.1%
Attend Sporting Event	0.7%	0.8%	0.3%	0.9%	0.9%	1.6%	1.3%	2.0%
Other Internet Sources	0.3%	0.4%	0.0%	0.4%	0.5%	0.6%	0.2%	0.5%
Travel Agency	0.1%	0.4%	0.0%	0.0%	0.3%	0.1%	0.1%	0.1%
County/State Tourist Agency	0.1%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%
Media Coverage	0.1%	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%	0.1%
Spanish Language Media	0.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%
Bus Tour	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.3%	0.2%
Spring Training	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	2.4%
Other	6.6%	6.3%	4.8%	8.1%	3.3%	4.8%	4.7%	3.0%

\* Multiple responses accepted.



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Booking Tools	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Booked Trip with Travel Agency</b>								
Yes	24.5%	27.7%	26.7%	18.3%	25.6%	24.7%	28.3%	23.7%
No	75.5%	72.3%	73.3%	81.7%	74.4%	75.3%	71.7%	76.3%
<b>Booked Any Part of Trip Using Internet</b>								
Yes	48.8%	49.8%	47.0%	49.2%	46.0%	48.6%	42.3%	44.9%
No	51.2%	50.2%	53.0%	50.8%	54.0%	51.4%	57.7%	55.1%
<b>Booked Any Part of Trip Using Internet* (among those who used the Internet)</b>								
Hotel	73.8%	76.7%	73.6%	72.2%	61.3%	71.5%	65.4%	64.8%
Hotel website	38.2%	42.5%	38.6%	34.3%	27.6%	35.4%	34.8%	28.4%
Expedia	3.1%	4.2%	4.2%	1.7%	4.2%	1.9%	1.6%	2.5%
Travelocity	4.1%	5.8%	1.8%	4.6%	3.9%	4.8%	2.8%	2.2%
hotels.com	3.1%	0.8%	2.3%	6.1%	1.3%	2.2%	2.2%	1.8%
Hotwire	1.1%	0.8%	1.8%	0.8%	0.3%	0.4%	0.4%	1.3%
Orbitz	0.9%	1.7%	0.9%	0.0%	2.1%	0.5%	1.1%	1.2%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.7%	0.0%
Other Website	5.5%	2.5%	9.1%	5.1%	4.5%	6.3%	4.4%	6.9%
Don't Remember	17.9%	18.3%	15.0%	19.6%	17.1%	20.0%	17.7%	20.4%
Air	62.4%	68.3%	61.8%	58.5%	74.2%	64.7%	71.6%	76.1%
Car Rental	40.1%	45.0%	40.8%	34.4%	40.3%	42.1%	40.8%	41.7%
Tickets to Event	2.3%	2.5%	2.0%	2.7%	1.0%	1.7%	0.8%	0.5%
Other	1.8%	1.7%	0.0%	3.5%	5.6%	4.5%	2.9%	4.4%
<b>Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)</b>								
Yes	8.0%	8.9%	7.3%	7.8%	10.1%	5.7%	7.7%	7.2%
No	92.0%	91.1%	92.7%	92.2%	89.9%	94.3%	92.3%	92.8%

\* Multiple responses accepted.



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Activity Participation	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Participation in Specific Activities*</b>								
Restaurants	93.7%	94.8%	94.5%	92.3%	93.0%	92.5%	94.1%	93.4%
Shopping	32.1%	36.5%	29.7%	29.8%	33.5%	28.3%	25.9%	33.1%
Went to Beach	31.8%	37.3%	30.0%	27.5%	30.7%	24.1%	17.3%	26.7%
Swimming	18.0%	20.2%	15.2%	20.1%	24.2%	13.6%	9.9%	13.2%
Visited downtown West Palm Beach Attractions/City Place	11.5%	12.0%	10.0%	12.6%	12.2%	8.3%	10.9%	11.5%
Bars/Nightclubs	10.9%	8.2%	11.6%	12.5%	13.2%	8.6%	10.1%	14.0%
Golf, Tennis	9.1%	10.7%	11.3%	5.7%	8.7%	6.5%	9.1%	11.8%
Visited Mizner Park/Boca Raton	5.1%	4.7%	5.6%	5.6%	8.3%	2.9%	4.3%	4.5%
Visited Downtown Delray Beach Attractions	3.3%	5.6%	1.2%	3.1%	7.7%	4.5%	5.8%	7.7%
Boating	2.6%	4.3%	0.9%	2.7%	3.2%	1.1%	0.9%	1.9%
Visited Wildlife Refuge	2.5%	2.1%	2.7%	2.7%	3.9%	1.5%	2.1%	2.9%
Visited Downtown at the Gardens	2.1%	0.4%	2.4%	3.5%	1.7%	0.4%	1.8%	1.6%
Attractions	2.1%	2.1%	2.0%	2.3%	3.4%	0.7%	0.6%	2.3%
Museums, Art Galleries	2.0%	2.1%	1.0%	2.6%	3.8%	1.4%	0.7%	4.3%
Performing Arts (plays, concerts, dance)	1.5%	2.1%	1.0%	1.4%	2.0%	0.7%	2.2%	0.9%
Fishing	1.3%	1.7%	0.5%	1.7%	0.9%	0.5%	1.6%	1.5%
Snorkeling	1.3%	1.7%	0.8%	1.4%	1.2%	0.6%	0.3%	0.3%
Attended a Sporting Event	1.3%	3.0%	0.3%	0.5%	1.8%	1.0%	1.0%	4.4%
Gambling Cruise	1.1%	2.1%	1.2%	0.0%	0.7%	0.5%	0.4%	0.3%
Palm Beach County Convention Center	0.9%	0.9%	1.1%	0.4%	0.4%	0.0%	0.1%	0.3%
Competed in Sports Event	0.8%	0.4%	1.1%	0.9%	0.6%	0.3%	0.3%	0.6%
Visited Riviera Beach/Singer Island	0.7%	0.0%	1.3%	0.9%	1.5%	0.7%	1.0%	1.0%
Visited downtown Lake Worth	0.6%	1.3%	0.0%	0.9%	1.9%	0.3%	1.2%	1.6%
Diving	0.6%	0.9%	0.5%	0.4%	1.0%	0.3%	0.2%	0.3%
Pari-mutuels (dog-track)	0.2%	0.0%	0.0%	0.5%	0.1%	0.7%	0.1%	0.3%
Surfing	0.1%	0.4%	0.0%	0.0%	0.3%	0.4%	0.1%	0.4%
Kite Surfing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Other	5.7%	8.6%	5.7%	2.6%	5.6%	5.2%	7.6%	5.5%

\*Multiple responses accepted.



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Return Visits	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Plan to Return to PBC</b>								
Yes	83.8%	83.7%	82.1%	85.1%	82.0%	83.9%	82.7%	84.5%
No	2.6%	4.1%	2.9%	0.8%	3.1%	2.3%	3.7%	2.5%
Don't know	13.6%	12.2%	15.0%	14.0%	14.9%	13.8%	13.6%	13.0%
<b>If no, why not?*</b> (Top mentions – 5% or higher)								
	n = 19	n = 10	n = 7	n = 2	n = 21	n = 17	n = 27	n = 19
No business in the area	16.3%	1	2	0	23.3%	25.1%	11.1%	20.0%
Going to other places/I like changing destinations	15.9%	3	0	0	24.1%	0.0%	0.0%	0.0%
Too expensive	14.9%	2	1	0	0.0%	6.6%	8.3%	0.0%
Moving away/To another country	5.3%	0	0	0	0.0%	0.0%	0.0%	9.3%
No interest	5.2%	0	1	0	0.0%	5.0%	0.0%	0.0%
Don't like it here	5.2%	1	0	0	0.0%	0.0%	0.0%	4.5%
Too crowded	5.2%	1	0	0	0.0%	0.0%	0.0%	0.0%
Too far	0.0%	0	0	0	0.0%	0.0%	15.3%	6.1%
Not ideal location	0.0%	0	0	0	0.0%	0.0%	0.0%	6.1%
Time Restraints	0.0%	0	0	0	0.0%	0.0%	0.0%	6.1%
Family moving away	0.0%	1	0	0	4.8%	0.0%	7.1%	0.0%
Job hunting	0.0%	0	0	0	0.0%	7.3%	4.1%	0.0%
Probate office people are rude	0.0%	0	0	0	0.0%	7.3%	0.0%	0.0%
Did not like Singer Island	0.0%	0	0	0	0.0%	6.6%	0.0%	0.0%
No fun	0.0%	0	0	0	0.0%	6.5%	0.0%	0.0%
No reason/No answer	32.0%	1	3	2	42.9%	31.3%	30.2%	38.5%
<b>When do you plan on returning to PBC?</b>								
Within the next 3 months	34.4%	32.7%	35.4%	35.0%	30.4%	42.2%	39.7%	29.7%
Within the next 6 months	12.3%	12.7%	12.5%	11.9%	12.2%	12.0%	12.1%	10.3%
Within the next year	26.1%	28.8%	20.4%	28.9%	22.3%	16.2%	19.0%	29.7%
Within the next few years	5.0%	3.4%	5.1%	6.6%	7.1%	4.2%	4.3%	6.1%
Don't Know	22.1%	22.4%	26.6%	17.6%	27.9%	25.4%	24.9%	24.2%

\*Multiple responses accepted.

\*\* Raw numbers shown due to low base size





## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Travel Details	Total <u>2Q 2007</u>	<u>April</u>	<u>May</u>	<u>June</u>	Total <u>2Q 2006</u>	Total <u>3Q 2006</u>	Total <u>4Q 2006</u>	Total <u>1Q 2007</u>
<b><u>Main Destination</u></b>								
Palm Beach County	87.4%	87.3%	89.1%	85.8%	91.3%	92.8%	92.2%	89.0%
<b><u>First Trip to PBC</u></b>	24.3%	20.3%	25.7%	26.6%	26.9%	26.7%	25.4%	19.8%
<b><u>Type of Transportation*</u></b>								
Airplane	72.2%	76.7%	74.9%	65.9%	80.1%	70.7%	74.1%	80.2%
Car	33.4%	26.9%	32.3%	40.2%	24.2%	33.1%	30.6%	24.5%
Other	0.7%	0.8%	0.3%	0.8%	1.1%	0.6%	0.7%	1.3%

\*Multiple responses accepted.



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Influence of Rising Costs	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b><u>Influence of fuel cost</u></b>								
5 – Strong consideration	4.5%	5.5%	4.7%	3.0%	5.6%	5.5%	4.1%	5.7%
4	6.2%	3.8%	6.2%	8.0%	4.2%	6.6%	4.0%	3.7%
3	8.9%	8.9%	7.7%	9.4%	8.1%	10.7%	9.6%	11.1%
2	5.6%	5.5%	4.0%	7.4%	7.0%	5.8%	2.5%	6.0%
1 – No consideration at all	48.6%	53.4%	51.0%	41.8%	51.5%	47.4%	54.2%	45.5%
I don't make the decision	26.2%	22.9%	26.3%	30.3%	23.5%	24.0%	25.6%	28.1%
<b><u>Influence of generally increasing travel costs</u></b>								
5 – Strong consideration	4.4%	4.7%	5.5%	2.9%	5.3%	5.0%	4.7%	5.2%
4	6.5%	4.7%	6.9%	7.1%	5.2%	6.5%	3.5%	3.5%
3	9.2%	9.0%	6.3%	11.6%	10.1%	11.7%	10.2%	13.2%
2	7.7%	6.4%	6.5%	10.2%	8.5%	7.4%	3.9%	6.5%
1 – No consideration at all	44.9%	50.2%	49.4%	35.8%	44.7%	44.6%	49.7%	42.5%
I don't make the decision	27.3%	24.9%	25.4%	32.5%	26.2%	24.9%	28.1%	29.1%



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Attitudes about Trip to Palm Beach County	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Things Liked Best – Top Mentions</b>								
Climate/Weather	36.9%	46.6%	38.6%	26.4%	35.1%	25.3%	42.0%	48.9%
Beaches/Ocean	13.5%	9.0%	14.5%	16.5%	12.3%	18.7%	9.5%	10.8%
Beautiful Area/Nice Place	8.4%	9.5%	6.9%	9.2%	6.0%	8.5%	7.5%	6.8%
Visiting Friends/Friends	5.0%	4.8%	4.1%	6.2%	4.0%	4.2%	3.7%	2.9%
Nice People	4.5%	4.2%	3.7%	5.5%	4.0%	4.7%	4.9%	4.0%
Cleanliness	4.5%	4.8%	5.4%	3.6%	4.7%	4.6%	4.6%	2.4%
Hotel	3.6%	1.6%	2.6%	6.6%	4.0%	4.1%	2.7%	1.9%
Everything	3.0%	3.7%	2.0%	3.2%	3.3%	1.4%	1.3%	1.9%
Relaxing Atmosphere	2.6%	1.6%	4.0%	2.0%	4.8%	3.5%	2.3%	3.6%
Restaurant	2.2%	1.6%	1.9%	3.0%	3.6%	2.9%	2.2%	2.6%
Location	1.8%	0.5%	2.3%	2.5%	1.0%	1.9%	1.9%	0.7%
Palm Trees	1.8%	1.6%	1.6%	2.1%	1.4%	1.6%	1.9%	0.6%
Shopping	1.5%	0.5%	1.7%	2.5%	1.6%	1.8%	2.8%	1.5%
Golf	1.4%	1.6%	1.0%	1.5%	1.9%	1.8%	2.7%	3.3%
City Place	1.2%	0.5%	2.1%	1.0%	0.9%	1.4%	1.5%	1.1%
Other	8.1%	7.9%	7.6%	8.2%	11.4%	13.6%	8.5%	7.0%



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Attitudes about Trip to Palm Beach County	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Things Liked Least – Top Mentions</b>								
Traffic/Bad Drivers	33.4%	35.3%	41.7%	23.8%	36.5%	30.6%	36.8%	41.6%
Humidity/Poor Weather	15.3%	5.9%	13.8%	27.1%	19.0%	28.3%	14.9%	9.6%
Expensive	6.8%	9.8%	7.7%	2.1%	5.1%	3.7%	3.0%	5.8%
Road Construction	3.7%	0.0%	5.9%	5.2%	2.9%	4.4%	4.1%	2.8%
Crowded	3.4%	4.9%	3.1%	2.1%	3.9%	1.7%	1.5%	3.6%
Hotel (general)	2.8%	2.9%	3.1%	2.0%	3.0%	2.3%	2.2%	1.6%
Bugs/Lizards	2.1%	2.0%	0.0%	4.1%	0.9%	1.2%	0.3%	0.6%
Unfriendly People	1.8%	2.9%	2.6%	0.0%	3.0%	1.1%	1.5%	1.6%
Stay Was Too Short	1.6%	1.0%	0.7%	3.0%	1.1%	2.7%	2.2%	1.6%
Far away	1.4%	2.0%	2.1%	0.0%	0.0%	0.6%	0.2%	0.0%
Work	1.4%	2.0%	1.0%	0.9%	0.6%	0.5%	0.0%	1.7%
Bad neighborhoods/crime	1.0%	2.9%	0.0%	0.0%	0.6%	1.2%	1.7%	0.0%
Lack of Entertainment/ Shopping in PM	1.0%	1.0%	0.0%	2.1%	0.3%	0.3%	0.2%	1.3%
Too noisy	1.0%	1.0%	2.1%	0.0%	0.3%	0.6%	0.6%	0.9%
Water had bad taste	1.0%	2.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.9%
Sea Lice	0.7%	0.0%	2.6%	0.0%	0.0%	0.2%	0.0%	0.3%
Food	0.7%	2.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.5%
Hotel location	0.7%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Shopping	0.6%	2.0%	0.0%	0.0%	0.3%	0.0%	0.3%	0.0%
Cost of Hotel	0.6%	0.0%	0.0%	2.1%	0.6%	0.2%	0.7%	2.2%
Pan handlers/homeless people	0.6%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Over developed	0.6%	0.0%	0.0%	2.1%	0.0%	0.6%	0.7%	0.0%
Other	9.6%	7.6%	10.4%	9.9%	12.7%	12.1%	15.0%	12.2%
Nothing liked least	8.2%	8.8%	3.2%	12.3%	9.2%	7.5%	14.1%	11.2%



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Attitudes about Trip to Palm Beach County	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Suggestions for Improvement - Top Mentions*</b>								
Longer stay	20.3%	26.6%	13.3%	20.9%	21.2%	28.8%	15.6%	22.3%
Better weather	11.1%	7.6%	12.2%	14.3%	11.4%	11.8%	8.1%	13.7%
Less business and more partying/more free time	10.7%	7.6%	19.2%	4.4%	9.3%	6.9%	13.2%	3.0%
Improve traffic/Finish Construction on I-95	7.8%	6.3%	12.6%	4.8%	11.3%	7.2%	9.4%	7.1%
Better hotel	3.7%	3.8%	4.8%	1.4%	1.6%	3.6%	2.2%	4.1%
Cheaper hotel room	3.3%	0.0%	2.8%	4.8%	1.7%	1.1%	1.2%	2.9%
Come with friends/family	3.2%	3.8%	2.8%	3.2%	4.8%	3.6%	5.5%	6.2%
Lower prices	2.4%	5.1%	1.4%	0.0%	2.7%	2.5%	1.8%	2.9%
Come during vacation time	2.3%	1.3%	3.8%	1.6%	6.3%	7.9%	12.5%	6.9%
Better food	1.9%	3.8%	1.4%	0.0%	0.4%	0.4%	0.0%	0.8%
Play golf	1.9%	0.0%	1.4%	4.8%	0.4%	0.9%	1.1%	0.9%
More/better maps of PBC at hotels	1.0%	0.0%	0.0%	3.2%	0.4%	0.0%	1.4%	1.0%
Nothing	7.9%	10.1%	2.9%	11.1%	8.5%	6.5%	8.3%	7.6%
Other	22.5%	24.0%	21.4%	25.5%	20.0%	18.8%	19.7%	20.6%

\*Multiple responses accepted.



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Characteristics of Visitors	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Age</b>								
Under 35	16.1%	14.3%	16.3%	17.6%	18.5%	18.8%	19.4%	15.6%
35 to 54	55.0%	52.7%	57.1%	54.9%	57.3%	58.8%	52.9%	51.6%
55 to 64	21.1%	24.1%	18.5%	21.4%	18.2%	16.1%	22.0%	21.8%
65 +	7.8%	9.0%	8.1%	6.1%	6.0%	6.3%	5.7%	11.0%
<b>Occupation</b>								
Professional/Managerial	63.7%	62.5%	65.3%	63.4%	60.2%	63.1%	63.5%	63.5%
Sales	16.5%	17.5%	16.4%	15.2%	16.4%	16.1%	14.6%	14.7%
Retired	9.3%	10.8%	7.9%	9.2%	7.3%	7.6%	6.3%	10.8%
Technical	5.3%	3.8%	6.8%	5.1%	8.8%	8.1%	10.0%	5.8%
Student	0.6%	1.7%	0.0%	0.0%	1.3%	0.9%	0.8%	1.0%
Other	4.7%	3.8%	3.7%	7.0%	6.1%	4.1%	4.9%	4.1%
<b>Hispanic Origin</b>	5.7%	4.9%	5.4%	6.7%	6.7%	7.0%	5.0%	4.0%
<b>Ethnicity</b>								
White/Caucasian	91.4%	93.6%	92.0%	88.5%	91.8%	90.4%	90.5%	92.9%
African-American/Black	5.9%	4.7%	5.6%	7.6%	4.9%	5.7%	5.3%	5.2%
Asian	2.8%	1.7%	2.4%	3.9%	2.8%	3.8%	3.5%	1.8%
Other	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%	0.7%	0.2%



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Characteristics of Visitors (Continued)	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b><u>Income</u></b>								
Under \$45,000	5.5%	4.0%	5.0%	7.4%	3.3%	5.3%	4.3%	4.5%
\$45,000 to \$64,999	9.8%	8.5%	9.3%	11.4%	10.7%	11.9%	9.4%	6.2%
\$65,000 to \$99,999	19.2%	15.6%	18.7%	24.1%	21.3%	26.4%	21.2%	21.9%
\$100,000 to \$200,000	42.3%	42.4%	44.9%	38.9%	42.3%	41.3%	42.2%	39.8%
Over \$200,000	23.2%	29.5%	22.1%	18.2%	22.4%	15.1%	23.0%	27.5%
<b><u>Description of Travel Party*</u></b>								
Adult family members or friends	44.9%	49.6%	39.3%	46.0%	38.2%	33.7%	29.6%	41.6%
Self Only	30.8%	27.2%	36.2%	29.1%	33.0%	40.1%	37.3%	31.6%
Business Associates	23.1%	21.0%	22.7%	25.4%	28.0%	24.6%	32.5%	26.5%
Children <12 years of age	8.7%	9.8%	6.4%	9.5%	8.1%	6.9%	4.6%	7.7%
Grandchildren <12 years of age	0.5%	0.0%	0.0%	1.2%	0.3%	0.3%	0.1%	0.2%
<b><u>Gender</u></b>								
Male	59.7%	61.7%	58.9%	57.7%	59.7%	60.6%	59.7%	56.3%
Female	40.3%	38.3%	41.1%	42.3%	40.3%	39.4%	40.3%	43.7%

\*Multiple responses accepted.



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

<u>Description of Travel Party*</u>	Pleasure Hotel Guests							
	<u>Total 2Q 2007</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2006</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>
Adult family members or friends	83.8%	83.3%	81.9%	85.6%	84.3%	82.9%	77.6%	83.7%
Children under 12 years of age	16.2%	18.4%	11.9%	16.4%	16.8%	20.2%	9.8%	15.8%
Self Only	9.2%	10.5%	11.1%	6.6%	9.5%	11.2%	16.6%	11.4%
Business Associates	3.7%	1.8%	3.5%	5.9%	2.0%	1.0%	4.8%	4.0%
Grandchildren under 12 years of age	1.0%	0.0%	0.0%	2.7%	0.7%	0.9%	0.4%	0.6%

<u>Description of Travel Party*</u>	Business Hotel Guests							
	<u>Total 2Q 2007</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2006</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>
Self Only	47.7%	44.0%	50.7%	47.6%	46.5%	53.6%	44.6%	47.2%
Business Associates	38.9%	41.3%	34.3%	42.0%	42.8%	35.9%	42.8%	43.2%
Adult family members or friends	13.7%	14.7%	14.0%	12.8%	11.9%	10.5%	12.1%	9.7%
Children under 12 years of age	2.8%	0.9%	3.2%	4.0%	2.8%	0.6%	2.6%	1.4%
Grandchildren under 12 years of age	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%





## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Place of Origin	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b><u>Domestic</u></b>	<b>90.9%</b> (n=667)	<b>90.0%</b>	<b>91.7%</b>	<b>91.3%</b>	<b>90.8%</b> (n=671)	<b>91.9%</b> (n=673)	<b>92.5%</b> (n=677)	<b>91.2%</b> (n=664)
Florida	24.4% (n=179)	19.5%	24.6%	28.0%	18.1% (n=134)	26.7% (n=195)	24.8% (n=182)	16.4% (n=120)
Southeast	16.0% (n=118)	16.2%	15.6%	16.2%	18.3% (n=136)	20.1% (n=147)	14.9% (n=109)	17.6% (n=128)
Mid Atlantic	14.3% (n=105)	19.9%	14.5%	8.5%	12.6% (n=93)	11.2% (n=82)	12.1% (n=89)	15.2% (n=111)
Midwest	12.4% (n=91)	10.0%	12.4%	14.5%	14.3% (n=106)	14.2% (n=104)	18.0% (n=131)	16.9% (n=123)
New York	9.3% (n=69)	9.1%	7.5%	11.5%	11.9% (n=88)	7.0% (n=51)	8.3% (n=61)	9.4% (n=69)
Far West	7.6% (n=56)	5.8%	9.6%	7.8%	8.8% (n=65)	8.6% (n=63)	7.7% (n=56)	6.6% (n=48)
New England	6.9% (n=51)	9.5%	7.5%	4.8%	6.8% (n=50)	4.1% (n=30)	6.6% (n=49)	9.2% (n=67)
<b><u>International</u></b>	<b>9.1%</b> (n=67)	<b>10.0%</b>	<b>7.9%</b>	<b>8.7%</b>	<b>9.2%</b> (n=68)	<b>8.1%</b> (n=59)	<b>7.5%</b> (n=55)	<b>8.8%</b> (n=64)
Europe (net)	4.6% (n=34)	5.0%	4.7%	4.1%	4.5% (n=34)	3.8% (n=28)	3.7% (n=27)	3.7% (n=27)
- England/UK	1.8% (n=13)	1.7%	2.0%	1.7%	2.3% (n=17)	1.7% (n=12)	1.9% (n=14)	1.6% (n=12)
- Germany	0.4% (n=3)	0.4%	0.3%	0.4%	0.4% (n=3)	0.3% (n=2)	0.5% (n=3)	1.0% (n=7)
Latin America / Caribbean	2.0% (n=15)	2.9%	1.0%	2.1%	2.0% (n=15)	1.8% (n=13)	1.8% (n=13)	1.9% (n=14)
Canada	1.4% (n=10)	1.7%	1.6%	0.8%	1.6% (n=12)	1.9% (n=14)	1.0% (n=7)	2.7% (n=20)
Australia/Asia	0.6% (n=5)	0.4%	0.3%	1.2%	0.8% (n=6)	0.6% (n=4)	0.7% (n=5)	0.4% (n=3)
Africa	0.4% (n=3)	0.0%	0.4%	0.4%	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)
Middle East	0.0% (n=0)	0.0%	0.0%	0.0%	0.3% (n=2)	0.1% (n=1)	0.3% (n=2)	0.0% (n=0)



## Hotel Survey: 2<sup>nd</sup> Quarter 2007

Pleasure Vs. Business By Selected Place of Origin	Total 2Q 2007	April	May	June	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007
<b>Florida</b>	<b>24.4%</b>	<b>19.5%</b>	<b>24.6%</b>	<b>28.0%</b>	<b>18.1%</b>	<b>26.7%</b>	<b>24.8%</b>	<b>16.4%</b>
Business	13.6%	11.2%	15.3%	13.9%	13.9%	18.6%	20.0%	10.2%
Pleasure	10.3%	7.9%	8.9%	14.3%	4.1%	7.7%	4.8%	6.0%
<b>Southeast</b>	<b>16.0%</b>	<b>16.2%</b>	<b>15.6%</b>	<b>16.2%</b>	<b>18.3%</b>	<b>20.1%</b>	<b>14.9%</b>	<b>17.6%</b>
Business	10.8%	11.2%	10.1%	11.0%	14.6%	14.9%	12.2%	12.1%
Pleasure	5.3%	5.0%	5.6%	5.3%	3.7%	5.1%	2.6%	5.1%
<b>Mid Atlantic</b>	<b>14.3%</b>	<b>19.9%</b>	<b>14.5%</b>	<b>8.5%</b>	<b>12.6%</b>	<b>11.2%</b>	<b>12.1%</b>	<b>15.2%</b>
Business	6.1%	7.5%	7.3%	3.7%	5.8%	6.1%	8.1%	7.1%
Pleasure	8.0%	12.4%	7.3%	4.5%	6.6%	4.5%	3.7%	7.6%
<b>Midwest</b>	<b>12.4%</b>	<b>10.0%</b>	<b>12.4%</b>	<b>14.5%</b>	<b>14.3%</b>	<b>14.2%</b>	<b>18.0%</b>	<b>16.9%</b>
Business	7.5%	4.6%	8.1%	9.4%	9.2%	10.1%	13.7%	9.6%
Pleasure	4.8%	5.4%	4.4%	4.9%	5.1%	4.1%	4.2%	6.9%
<b>New York</b>	<b>9.3%</b>	<b>9.1%</b>	<b>7.5%</b>	<b>11.5%</b>	<b>11.9%</b>	<b>7.0%</b>	<b>8.3%</b>	<b>9.4%</b>
Business	3.1%	7.5%	3.2%	4.5%	4.2%	2.3%	4.4%	3.6%
Pleasure	6.1%	1.7%	4.0%	6.9%	7.7%	4.2%	3.8%	5.8%
<b>Far West</b>	<b>7.6%</b>	<b>5.8%</b>	<b>9.6%</b>	<b>7.8%</b>	<b>8.8%</b>	<b>8.6%</b>	<b>7.7%</b>	<b>6.6%</b>
Business	5.0%	3.3%	6.9%	4.9%	7.4%	6.7%	5.9%	4.1%
Pleasure	2.5%	2.5%	2.8%	2.4%	1.4%	1.5%	1.6%	2.5%
<b>New England</b>	<b>6.9%</b>	<b>9.5%</b>	<b>7.5%</b>	<b>4.8%</b>	<b>6.8%</b>	<b>4.1%</b>	<b>6.6%</b>	<b>9.2%</b>
Business	3.1%	6.2%	4.4%	2.4%	2.7%	2.9%	4.0%	4.7%
Pleasure	3.7%	3.3%	3.2%	2.4%	3.7%	1.0%	2.6%	4.5%