Report on Palm Beach County Tourism
Third Quarter 2008
(July, August and September)

Prepared for:
Tourist Development Council of Palm Beach County

Prepared by:

PROFILE
MARKETING RESEARCH

4020 S. 57th Avenue
Lake Worth, FL 33463
(561)965-8300
www.profile-mktg-res.com

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Introduction: 3rd Quarter 2008

Background

- The following report contains information collected during the 3rd Quarter of 2008 (July, August and September), fourth quarter of Fiscal Year 2007/2008.

- Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.

Property Manager Survey: 3rd Quarter 2008

Occupancy Rates

- **In the third quarter of 2008, the average occupancy rate for responding Palm Beach County hotels was 53.6%. This is 11.9 percentage points lower than last quarter (65.5%) and 2.4 percentage points lower than 3Q2007 (56.0%).**
  - The average occupancy rate among larger properties (101+ rooms) was 56.0%, and 40.9%* among smaller properties (50-100 rooms).

- **Property mangers in all three geographic regions of Palm Beach County cited comparable occupancy rates in 3Q2008 (53.9% North, 53.6% South, and 53.5% Central).**
  - Hotels in all three regions saw decreases in their occupancy rates relative to last quarter (Central – a 12.9 percentage point decrease from 66.4%, North – a 12.0 percentage point decrease from 65.9% and South – a 10.7 percentage point decrease from 64.3%).
  - Compared to the same quarter last year, the average occupancy rate decreased among properties in all three regions, although to a lesser degree than as compared to 2Q2008 (North – a 2.0 percentage point decrease from 55.9%, Central – a 6.2 percentage point decrease from 59.7%, South – a 0.9 percentage point decrease from 52.7%).

- **During the third quarter of 2008 the approximate number of hotel room nights occupied** was 727,536 – a decrease of 148,702 room nights relative to 2Q2008 (876,238) and a decrease of 36,068 room nights compared to 3Q2007 (763,604).**

- **Among participating hotel managers in 3Q2008, 8.0% of hotel guests traveled internationally. This is 3.2 percentage points higher than in 2Q2008 (4.8%) and 1.4 percentage points higher than in 3Q2007 (6.6%).**
  - Property managers from smaller hotels (50-100 rooms) cited that, on average, 19.4% of their guests traveled from outside of the United States, while those managers from larger properties (101+ rooms) claimed that, on average, 6.2% of their guests were international travelers.
  - As seen in previous quarters, hotels in the Southern region of Palm Beach County continued to experience the highest percentage of guests traveling internationally (12.0%). Property managers in the Central and Northern regions reported that 6.5% and 4.6% of their guests, respectively, were international travelers in 3Q2008.

- **Leisure and business travelers occupied comparable percentages of hotel rooms during 3Q2008 (36.6% and 36.9%, respectively). The remaining occupied rooms in PBC were occupied by convention/group travelers during 3Q2008 (26.5%).**

- **Hotel managers from convention hotels reported that 30.3% of their reservations were made by convention/group travelers; a decrease of 5.3 percentage points compared to 2Q2008 (35.6%) and an increase of 3.7 percentage points relative to 3Q2007 (26.6%).**

* Please note that the response rate for hotels with 50-100 rooms was low in July (29.4%), August (27.9%) and September (38.0%)
** Properties well below 50 rooms are only included in room count and total inventory.

Property Manager Survey: 3rd Quarter 2008

Average Daily Room Rate (ADR)

▪ **As reported by participating Palm Beach County property managers, the ADR for all properties in 3Q2008 was $121.39 – this corresponds to a 21.5% ($33.19) decrease compared to 2Q2008 ($154.58) and a 9.7% ($10.74) increase compared to 3Q2007 ($110.65).**

  ▪ Hotel managers of smaller properties (50-100 rooms)* reported a 14.2% increase in ADR relative to 3Q2007 (from $98.11 to $112.09) and a 20.0% decrease compared to 2Q2008 ($140.17). Managers of larger properties (101+ rooms) cited a 9.2% increase compared to 3Q2007 (from $112.91 to $123.30) and a 21.7% decrease compared to last quarter ($157.39).

  ▪ In 3Q2008, larger properties, hotels with 101-219 rooms saw an ADR of $92.83 (a 7.1 percentage point increase from 3Q2007, $86.64) and hotels with 220-500 rooms experienced an ADR of $143.28 (a 12.7 percentage point increase from 3Q2007, $127.08). Hotels with 101-219 rooms and hotels with 220-500 rooms saw decreases in ADR compared to 2Q2008 (down 18.7 percentage points among hotels with 101-219 rooms and down 12.9 percentage points among hotels with 220-500 rooms).

Future Business Outlook

▪ **Regarding the business outlook for the next two months as relative to the same months last year, more than two-thirds of surveyed hotel managers expected a decrease in total room revenue (68.1%; 61.3% Group/Individual Business, 64.1% Individual Vacation). Thirteen percent of surveyed hotel managers anticipated an increase (19.7% Group/Individual Business, 13.1% Individual Vacation) and 18.9% anticipated no change (19.0% Group/Individual Business, 22.8% 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 16.0% (11.1% - Group/Individual Business, 12.0% Individual Vacation).**

  ▪ Among hotel managers who anticipated a decrease in room revenue relative to the previous year, the average decrease predicted was 10.9% (11.4% - Group/Individual Business, 13.0% Individual Vacation).**

▪ **When predicting changes in room revenue for the following third and fourth months compared to the same months last year, 60.7% of responding hotel managers were expecting a decrease (57.8% Group/Individual Business, 62.4% Individual Vacation), 16.1% of surveyed managers expected an increase in total room revenue (18.5% Group/Individual Business, 14.8% Individual Vacation), and 23.3% predicted no change (23.7% Group/Individual Business, 22.8% Individual Vacation).****

  ▪ Among hotel managers who anticipated an increase in room revenue relative to the previous year, the average increase forecasted was 14.8% (11.1% - Group/Individual Business, 12.3% Individual Vacation).**

  ▪ Among hotel managers who expected a decrease in room revenue compared to the previous year, the average decrease predicted was 11.0% (12.1% - Group/Individual Business, 11.7% Individual Vacation).**

* Please note that the response rate for hotels with 50-100 rooms was low in July (29.4%), August (27.9%) and September (38.0%)
** Based on those responding for each (total, group/individual business, individual vacation)

Property Manager Survey: 3rd Quarter 2008

Bookings Via Third Party Websites

- **During 3Q2008 an average of 18.4% of Palm Beach County hotel bookings were completed via third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc.). This is an increase of 5.0 percentage points compared to 2Q2008 (13.4%) and increase of 5.1 percentage points relative to 3Q2007 (13.3%).**
  - As in previous quarters, smaller properties (50-100 rooms) continued to experience a greater percentage of reservations sold through third party websites (29.0%) than larger properties (101+ rooms, 13.6%) in 3Q2008.

Market Focus

- **During the third quarter of 2008, the primary focus for hotel managers, in terms of marketing, advertising and promotion, was on the Florida Leisure Drive Market (70.0%).**

- **When asked about the greatest challenges for the remainder of 2008, responding hotel managers most often mentioned the economy in general and trying to gain occupancy in their hotels. A comprehensive list can be found on pages 23 and 24**.

Hotel Visitor Survey: 3rd Quarter 2008

Characteristics of Stay

- **During the third quarter of 2008 the average party size of surveyed hotel guests was 2.1*. The median party size for 3Q2008 was 2.0, as was the case for all months within the quarter, as well as last quarter and last year.**

- **On average, 3Q2008 surveyed hotel visitors spent 3.5 nights in a hotel and occupied an average of 1.3 rooms per night*.**

Planning the Trip to Palm Beach County

- **During 3Q2008 more than one-half of surveyed hotel guests (55.9%) were in Palm Beach County on a business trip (conference/convention/business meeting); nearly one-half were in town for a business meeting (47.6%). Guests traveling on vacation comprised more than one-third of the surveyed guests (35.9%).**
  - The proportion of business to leisure travelers was consistent with 3Q2007 and 2Q2008.

- **'Work Related Trip' was the reason more than one-half of surveyed hotel guests traveled to Palm Beach County instead of another destination (55.1%). Other responses frequently mentioned by visitors as to why they traveled to Palm Beach County rather than other destinations include 'Visit Friends/Relatives' (18.8%) and/or 'Previous Visit' (14.0%).**
  - Citing of 'Work Related Trip' as a reason for selecting PBC over other destinations remained at parity compared to last quarter (56.5%), but increased relative to 3Q2007 (50.7%, up 4.4 percentage points).

- **In 3Q2008, more than one-half of surveyed hotel guests stated 'Employer' as the decision maker regarding the trip to Palm Beach County (52.1%), which is 2.1 percentage points lower than in 2Q2008 (54.2%) and 5.4 percentage points higher than in 3Q2007 (46.7%).**
  - Four-in-ten surveyed hotel guests claimed that the decision to travel to Palm Beach County was made by the 'Head of Household/Other adult' (40.5%).

- **More than two-thirds of 3Q2008 surveyed hotel guests in PBC arranged their trip one month or less in advance (67.2%), which is 14.9 percentage points higher than in 2Q2008 (52.3%) and 7.2 percentage points higher than in 3Q2007 (60.0%).**

* 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.

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Hotel Visitor Survey: 3rd Quarter 2008

Booking a Trip to Palm Beach County

▪ **In 3Q2008, utilization of travel agents and the Internet to book any part of visitors' trips to PBC increased relative to last quarter (travel agents – from 21.8% in 2Q2008 to 23.4% in 3Q2008, up 1.6 percentage points; Internet – from 44.6% to 47.4%, up 2.8 percentage points).**

▪ **Relative to 3Q2007, utilization of travel agents increased by 2.2 percentage points (from 21.2% in 3Q2007 to 23.4% in 3Q2008), while utilization of the Internet decreased by 3.8 percentage points (from 51.2% in 3Q2007 to 47.4% in 3Q2008).**

  ▪ More than eighty-percent of surveyed hotel guests who utilized the Internet to book any part of their trip to PBC did so to book hotel rooms (82.7%), more than sixty-percent reserved airfares (61.3%), and more than one-third used it to secure a car rental (37.7%).

  ▪ In 3Q2008, hotel visitors surveyed were more likely to use the Internet to reserve hotel rooms (82.7%) than those surveyed during the prior quarter and the same quarter last year (2Q2008 - 75.1%, a 7.6 percentage point increase, 3Q2007 – 75.6%, a 7.1 percentage point increase).

  ▪ Hotel websites were utilized by approximately four-in-ten surveyed visitors who booked hotel rooms online in 3Q2008 (38.0%), which is at parity with 2Q2008 (38.2%) and 3Q2007 (39.2%).

  ▪ Six point two percent of surveyed hotel guests claimed their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meals, rental car, etc), which is at parity with 2Q2008 (5.5%) and 2.4 percentage points higher than the same quarter last year (3.8%).

Visitor Expenditures

▪ **During 3Q2008, in Palm Beach County, the average spending per party* was $1,281 which was at parity with the average spending per party last quarter ($1,287) and $67 (5.5%) more than the average spending per party in 3Q2007 ($1,214).**

  ▪ With the exception of 'Lodging', which decreased in 3Q2008 (from $626 to $602, a 3.8 percentage point decrease), all other spending categories increased compared to the third quarter of 2007.

  ▪ The largest increase pertained to 'Gifts/Shopping' which was up 57.8 percentage points (from $102 in 3Q2007 to $161 in 3Q2008).

  ▪ The average per person expenditure in the current quarter ($610) decreased compared to 2Q2008 ($644, down 5.3 percentage points) and increased relative to 3Q2007 ($578, up 5.5 percentage points).

▪ **On average, surveyed guests vacationing in PBC spent $1,591 per party, while those traveling for business spent $1,109.**

  ▪ Leisure and business travelers' per party expenditures increased relative to 2Q2008 (leisure - up 3.2%, from $1,541 to $1,591 and business – up 1.0%, from $1,098 to $1,109).

  ▪ Leisure travelers' per party spending increased by 25.6 percentage points from $1,267 in 3Q2007 to $1,591 in 3Q2008, while business travelers' per party spending decreased by 2.5 percentage points from $1,137 in 3Q2007 to $1,109 in 3Q2008.

* 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: 3rd Quarter 2008

Characteristics of Visitors

- Approximately nine-in-ten PBC visitors were White/Caucasian (89.0%).

- Fifty-three percent of those visiting PBC were between the ages of 35 and 54 (53.0%).

- Approximately six-in-ten responding hotel guests cited having professional/managerial jobs (58.5%).

- Approximately two-thirds of surveyed hotel guests claimed an annual household income of $100,000 or more (65.4%).

- In 3Q2008, pleasure hotel guests typically traveled to PBC with 'Adult Family Members and/or Friends' (81.5%), while business hotel guests came alone (54.7%) or with 'Business Associates' (32.0%).

Travel Details

- As experienced in prior quarters, Palm Beach County was the main destination for approximately nine-in-ten surveyed hotel visitors in 3Q2008 (90.9%).

- One-quarter of surveyed hotel guests were first time visitors to Palm Beach County (24.8%).

- Nearly seventy-percent of surveyed hotel guests traveled by airplane to Palm Beach County in 3Q2008 (69.1%), which is a 5.3 percentage point decrease from 2Q2008 (74.4%) and a 4.0 percentage point increase from 3Q2007 (65.1%).

- Car travel increased by 5.1 percentage points compared to 2Q2008 (from 30.5% in 2Q2008 to 35.6% in 3Q2008) and decreased by 3.3 percentage points relative to 3Q2007 (from 38.9% in 3Q2007 to 35.6% in 3Q2008).

- Whilemore than eighty-percent of 3Q2008 surveyed visitors traveled from within the United States (87.5%), this is a 3.8 percentage point decrease relative to 3Q2007 (91.3%) and a 2.1 percentage point decrease compared to 2Q2008 (89.6%).

Attitudes toward Palm Beach County

- During 3Q2008, more than one-quarter of surveyed hotel guests stated 'Climate/Weather' as the aspect of Palm Beach County they enjoyed the most (26.6%). 'Beaches/Ocean' followed as the next most frequently mentioned response in 3Q2008 (17.0%).

- 'Humidity/Poor Weather' (30.1%) and 'Traffic/Bad Drivers' (23.1%) were the top mentioned aspects that 3Q2008 surveyed guests claimed to not like about Palm Beach County.

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 ate at area restaurants while staying in Palm Beach County (94.7%). Shopping (32.2%), Going to the beach (30.2%) and/or Swimming (22.6%) were among other activities guests participated in while visiting PBC.

- The top mentioned activities in which hotel visitors stated they participated during a recent trip, yet wished they could have done in Palm Beach County were golf (16.4%) and going to the beach (9.5%) (both of which are available in PBC currently).

Hotel Visitor Survey: 3rd Quarter 2008

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 (85.4%). Only 3.1% stated they will not return. The remainder (11.5%) are not sure if they will come back to PBC in the future or not.**

  - Seventy-percent of those who plan to visit Palm Beach County again cited they will do so in the next year, more than one-third (35.1%) plan to come back to PBC within the next three months.

  - Reasons for those claiming they will not be visiting PBC again include: 'No business in the area', 'Don't Like Palm Beach/U.S.', 'Family moving away', 'Too far', and 'Terminated from work'. Nearly one-half of respondents who do not plan to return did not provide a reason for such (47.6%).

Vacation/Leisure Visitors

- During 3Q2008, more than sixty-percent of surveyed leisure visitors cited traveling within the United States for their last vacation (64.5%). Locales in Florida (25.6%), the Southeast (excluding Florida) (12.5%) and the Far West (10.2%) were the top domestic destinations mentioned.

- One-third of surveyed leisure hotel guests traveled to a country abroad for their last vacation (33.4%), of which more than ten percent mentioned a country in Latin America/Caribbean (16.6%) or Europe (12.2%).

- Just over 40% of responding leisure visitors considered other domestic destinations when planning their visit to PBC (40.5%), of which more than thirty-percent cited a location in Florida (37.4%).

- Throughout 3Q2008, PBC was perceived to be similar 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 great for museums and other cultural activities (69.2%)

    - Being great for historical sights and places (64.8%)

    - Being great for discovering nature-based activities/ecotourism (63.8%)

    - Being able to always find a new place to see or a new thing to do (63.3%)

    - Being appreciated as a tourist or visitor (63.0%)

    - Being a good value (58.1%)

    - Being a great place to go again and again (57.8%)

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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: 3rd Quarter 2008

	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Occupancy Rate								
Month/Quarter	53.6%	60.3%	54.6%	46.2%	56.0%	62.8%	78.9%	65.5%
FYTD (Oct. - Sept.)	65.2%	68.1%	66.9%	65.2%	67.4%	62.8%	70.8%	69.0%
Room Nights Occupied[1]*								
Month/Quarter	727,536	274,830	248,869	203,837	763,604	844,910	1,050,605	876,238
FYTD (Oct. - Sept.)	3,499,289	3,046,583	3,295,452	3,499,289	3,628,164	844,910	1,895,515	2,771,753
Percentage of Room Nights Occupied								
Leisure	36.6%	34.1%	39.7%	36.3%	42.8%	41.2%	40.9%	35.7%
Business	36.9%	38.8%	35.7%	36.0%	32.9%	31.4%	29.3%	32.8%
Convention/Group	26.5%	27.2%	24.6%	27.7%	24.3%	27.4%	29.8%	31.5%
Average Daily Room Rate [2]	$121.39	$129.74	$122.63	$109.30	$110.65	$150.18	$232.14	$154.58

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: 3rd Quarter 2008

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	00/01	01/02	02/03	03/04	04/05	05/06	06/07	07/08
3rd Quarter (July/Aug/Sept)	N/A	57.3	57.8	64.2	63.0	56.9	56.0	53.6
July	61.6	60.0	60.8	66.9	64.6	62.1	59.8	60.3
Aug	60.8	59.7	60.5	63.7	62.0	57.0	58.4	54.6
Sept	43.1	52.0	51.9	61.5	62.9	51.2	49.9	46.2
4th Quarter (Oct/Nov/Dec)	N/A	57.5	59.8	64.2	79.8	73.1	64.6	62.9
1st Quarter (Jan/Feb/Mar)	N/A	76.2	77.9	83.8	88.3	84.7	80.8	78.9
2nd Quarter (April/May/June)	N/A	65.1	67.0	71.8	72.7	71.0	68.5	65.5
Fiscal YTD (Oct. – Sept.)	**67.3**	**64.1**	**65.7**	**70.9**	**76.0**	**71.2**	**67.4**	**65.2**
Number of Room Nights Occupied in 3rd Quarter*							763,604	727,536

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

Property Manager Survey: 3rd Quarter 2008

	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Conference/Convention Bookings								
All Hotels								
% Occupied Room Nights in County	26.5%	27.2%	24.6%	27.7%	24.3%	27.4%	29.8%	31.5%
Occupied Room Nights in County	192,286	74,669	61,107	56,510	185,319	234,597	313,863	276,256
Occupied Room Nights in County FYTD (Oct.- Sept.)	1,017,002	899,385	960,492	1,017,002	979,774	234,597	548,460	824,716
Convention Hotels								
% Occupied Room Nights	30.3%	31.2%	27.1%	33.3%	26.6%	31.2%	31.7%	35.6%
Occupied Room Nights	131,933	52,260	40,174	39,499	122,959	156,420	192,168	186,568
Occupied Room Nights FYTD (Oct.- Sept.)	667,089	587,416	627,590	667,089	699,246	156,420	348,588	535,156
Available Inventory*								
Rooms in County	44,130	14,709**	14,706**	14,715**	44,384	43,934	43,946	44,175
Room Nights	1,353,315	455,979	455,886	441,450	1,361,116	1,347,398	1,333,012	1,339,981
Room Nights FYTD (Oct.- Sept.)	5,373,706	4,476,370	4,932,256	5,373,706	5,386,713	1,347,398	2,680,410	4,020,391
Response Rate								
Month/Quarter (for all hotels in County)	63.6%	64.7%	62.5%	63.6%	60.9%	62.8%	60.2%	61.6%
FYTD (Oct.- Sept.)	62.1%	61.9%	61.9%	62.1%	61.4%	62.8%	61.5%	61.6%

 * 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: 3rd Quarter 2008

Occupancy Rate	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Size of Hotel								
50 - 100 Rooms	40.9%	46.0%	42.1%	36.0%	51.6%	58.7%	74.5%	52.7%
101 + Rooms	56.0%	62.9%	56.9%	48.2%	56.8%	63.5%	79.6%	67.8%
101-219	53.3%	57.1%	54.5%	48.0%	56.2%	63.1%	78.8%	63.5%
220-500	60.3%	66.9%	64.4%	50.4%	60.6%	64.7%	80.4%	72.7%
All Properties	53.6%	60.3%	54.6%	46.2%	56.0%	62.9%	78.9%	65.5%
Geographic Region								
North	53.9%	61.7%	55.3%	44.8%	55.9%	57.7%	78.5%	65.9%
Central	53.5%	59.0%	55.3%	46.0%	59.7%	63.8%	83.4%	66.4%
South	53.6%	61.0%	53.3%	47.0%	52.7%	64.6%	74.7%	64.3%

What percent of your occupancy is international?	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Size of Hotel								
50-100 Rooms	19.4%	18.2%	26.6%	14.4%	17.5%	10.9%	7.1%	7.0%
101 + Rooms	6.2%	5.6%	7.5%	5.7%	5.0%	5.7%	5.0%	4.4%
101-219	7.4%	7.1%	7.3%	7.7%	5.8%	7.8%	5.1%	5.2%
220-500	5.4%	5.6%*	6.5%*	4.1%*	2.7%	4.3%	7.3%	4.8%
All Properties	8.0%	7.0%	10.1%	7.1%	6.6%	6.5%	5.5%	4.8%
Geographic Region								
North	4.6%	5.1%	4.1%	5.0%	1.9%	3.1%	3.0%	2.5%
Central	6.5%	5.5%	8.4%	5.3%	4.4%	5.3%	4.6%	4.9%
South	12.0%	9.7%	17.6%	10.3%	12.2%	8.8%	7.8%	5.9%

* Caution: Extremely Low base

Property Manager Survey: 3rd Quarter 2008

Average Daily Room Rate	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Size of Hotel								
50 - 100 Rooms*	$112.09	$114.23	$108.10	$113.40	$98.11	$145.62	$255.89	$140.17
101 + Rooms	$123.30	$132.56	$125.33	$109.21	$112.91	$151.60	$229.51	$157.39
101-219	$92.83	$93.80	$95.79	$87.72	$86.64	$98.77	$160.13	$114.20
220-500	$143.28	$161.76	$148.24	$113.76	$127.08	$170.29	$249.30	$164.54
All Properties	$121.39	$129.74	$122.63	$109.30	$110.65	$150.18	$232.14	$154.58

* Please note that the response rate for hotels with 50-100 rooms was low in July (29.4%), August (27.9%) and September (38.0%); the hotels that replied are more upscale with higher rates (i.e. Chesterfield, Colony and Brazilian Court Hotels in Palm Beach).

Property Manager Survey: 3rd Quarter 2008

Occupied Room Nights *	Occupied Room Nights	% Change
3Q		
2006	769,629	
2007	763,604	- 0.8
2008	727,536	- 4.7
July		
2006	287,148	
2007	274,325	- 4.5
2008	274,830	0.2
August		
2006	258,547	
2007	267,903	3.6
2008	248,869	- 7.1
September		
2006	223,934	
2007	221,376	- 1.1
2008	203,837	- 7.9
4Q		
2006	858,302	
2007	844,910	- 1.6
2008		
1Q		
2006	1,138,435	
2007	1,070,734	- 5.9
2008	1,050,605	- 1.9
2Q		
2006	964,792	
2007	935,524	- 3.0
2008	876,238	- 6.3
FYTD (October – September)		
2006	3,829,804	
2007	3,628,164	- 5.3
2008	3,499,289	- 3.6

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

Property Manager Survey: 3rd Quarter 2008

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
August 2008 / September 2008 predictions from July			
Foresee Decrease	70.2%	64.0%	62.7%
Average decrease (among those who foresee decrease)	8.8%	8.7%	10.5%
Foresee No Change	16.0%	17.5%	24.4%
Foresee Increase	13.8%	18.5%	12.9%
Average increase (among those who foresee increase)	9.8%	7.4%	5.3%
September 2008 / October 2008 predictions from August			
Foresee Decrease	66.7%	57.8%	66.2%
Average decrease (among those who foresee decrease)	12.4%	14.4%	14.6%
Foresee No Change	17.2%	19.9%	17.6%
Foresee Increase	16.1%	22.3%	16.2%
Average increase (among those who foresee increase)	16.2%	11.9%	13.3%
October 2008 / November 2008 predictions from September			
Foresee Decrease	67.5%	61.0%	63.9%
Average decrease (among those who foresee decrease)	12.1%	12.0%	14.2%
Foresee No Change	23.3%	20.2%	26.9%
Foresee Increase	9.2%	18.8%	9.2%
Average increase (among those who foresee increase)	24.0%	14.4%	19.0%
Third Quarter predictions from July, August and September			
Foresee Decrease	68.1%	61.3%	64.1%
Average decrease (among those who foresee decrease)	10.9%	11.4%	13.0%
Foresee No Change	18.9%	19.0%	22.8%
Foresee Increase	13.0%	19.7%	13.1%
Average increase (among those who foresee increase)	16.0%	11.1%	12.0%

Property Manager Survey: 3rd Quarter 2008

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
October 2008 / November 2008 predictions from July			
Foresee Decrease	68.8%	60.6%	65.2%
Average decrease (among those who foresee decrease)	8.1%	8.0%	7.4%
Foresee No Change	19.7%	22.4%	23.0%
Foresee Increase	11.5%	17.0%	11.8%
Average increase (among those who foresee increase)	6.0%	4.2%	4.2%
November 2008 / December 2008 predictions from August			
Foresee Decrease	51.4%	52.9%	62.1%
Average decrease (among those who foresee decrease)	13.9%	14.9%	14.0%
Foresee No Change	21.7%	24.8%	16.7%
Foresee Increase	26.9%	22.3%	21.1%
Average increase (among those who foresee increase)	12.2%	16.8%	12.6%
December 2008 / January 2009 predictions from September			
Foresee Decrease	62.0%	58.1%	60.0%
Average decrease (among those who foresee decrease)	12.2%	14.3%	14.6%
Foresee No Change	28.5%	25.9%	29.0%
Foresee Increase	9.5%	15.9%	11.0%
Average increase (among those who foresee increase)	32.5%	10.2%	20.4%
Third Quarter predictions from July, August and September			
Foresee Decrease	60.7%	57.8%	62.4%
Average decrease (among those who foresee decrease)	11.0%	12.1%	11.7%
Foresee No Change	23.3%	23.7%	22.8%
Foresee Increase	16.1%	18.5%	14.8%
Average increase (among those who foresee increase)	14.8%	11.1%	12.3%

Property Manager Survey: 3rd Quarter 2008

Bookings via third party website	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Size of Hotel								
50 - 100 Rooms	29.0%	29.9%	20.8%	32.9%	25.8%	24.8%	21.8%	16.8%
101 + Rooms	13.6%	11.0%	15.0%	15.0%	9.3%	11.2%	9.4%	11.3%
101-219	14.0%	11.7%	15.1%	15.2%	9.8%	11.1%	9.9%	12.1%
220-500	13.6%	9.6%	16.9%	16.8%	7.7%	12.8%	8.1%	8.1%
All Properties	18.4%	17.0%	16.8%	21.4%	13.3%	15.1%	14.5%	13.4%

Property Manager Survey: 3rd Quarter 2008

	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
MARKET FOCUS (in terms of marketing, advertising and promotion)								
Florida Leisure Drive Market	70.0%	70.9%	68.9%	72.2%	81.8%	67.1%	88.2%	88.9%
Florida Business Drive Market	56.2%	55.7%	61.2%	53.9%	63.9%	59.7%	72.7%	71.3%
Florida Association Market	63.3%	59.2%	62.8%	66.0%	35.4%	43.8%	45.5%	57.6%
Weddings	57.4%	57.6%	60.2%	55.1%	51.5%	53.0%	62.2%	64.0%
Amateur Sports Events	59.9%	62.2%	63.4%	53.9%	57.5%	50.9%	61.5%	58.4%
Convention - Northeast	26.9%	32.6%	19.9%	28.5%	18.0%	23.7%	22.8%	17.9%
Convention - Mid-Atlantic	21.4%	16.9%	17.4%	29.4%	13.4%	12.6%	11.4%	10.0%
Convention - South	28.0%	31.0%	22.5%	31.2%	15.5%	15.2%	21.5%	19.9%
Convention - Midwest	20.8%	19.4%	15.2%	26.7%	10.1%	10.9%	11.2%	14.0%
Other**	20.3%	22.2%	20.8%	15.9%	N/A	N/A	N/A	12.3%

** No answer (nine mentions), Third Party Vendors (three mentions), Small group meetings (two mentions),
Government (two mentions), Sports, Concert, Business Fly-in, Bus Tours, IBT, Small Meetings-All Areas, Non-profit Groups
(one mention each)

Property Manager Survey: 3rd Quarter 2008

Greatest challenges for the remainder of 2008*	Total
Economy/Poor economy/Global Crisis now looming over the current economy	27
Gaining occupancy/Occupancy/Building Occupancy/Heads in beds	10
Fuel costs contributing to shorter stays/High gas prices	8
Lack of new demand with increasing supply/Too much supply and demand is down	6
Groups/Increase group bookings	4
Competition from other hotels	3
Companies cutting travel expenditures/Corporate cut backs	3
Airlines/Airline prices	2
Sports Team Business	2
Attracting guests due to economy	2
Unemployment	2
Short term booking window for the leisure segment	2
Short term booking window for the group segment	1
Maintaining occupancy	1
Maintaining previous year's travel history	1
Meeting minimum occupancy of 80%	1
Travel expense decrease	1
Price Cuts	1
Short term booking window for transient business	1
Economic fears deterring group attendance	1
Opening a new branded hotel	1
Maintain ADR	1
Social Business	1
Non-Profit Business	1
Association Business	1
Weekend Business	1
Pharmaceutical Business	1
Summer Business	1
Elections	1
Stock Market	1
Strong dollar	1
Rate resistance	1
Leisure occupancy	1
Completing renovations	1
Group cancellations from the financial industry	1

* Multiple responses accepted.

Property Manager Survey: 3rd Quarter 2008

Greatest challenges for the remainder of 2008* (continued)	Total
Avoiding hurricanes which is slowing down travel to Florida	1
Storm issues	1
Increasing room revenue	1
Disposable income	1
Hotels are cutting rates up to 20% - even the full service ones	1
Turn around time for groups to make final booking decisions due to economic situations	1
To keep repeat business	1
Be profitable	1
Corporate Group Cancellations	1
Drop in occupancy	1
Flight decreases	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: 3rd Quarter 2008

Characteristics of Stay	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Average Party Size *	2.1	2.2	2.3	1.9	2.1	1.9	2.0	2.0
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.7	3.4	4.0	3.5	3.5	3.3	3.6	3.4
Nights in Hotel	3.5	3.2	3.8	3.4	3.4	3.2	3.5	3.3
Rooms per Night *	1.3	1.3	1.3	1.3	1.2	1.3	1.3	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: 3ʳᵈ Quarter 2008

Visitor Expenditures+	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Average Expenditure Per Visit								
Lodging	$602	$547	$635	$615	$626	$688	$1,106	$700
Restaurant/Bar	$336	$314	$410	$292	$323	$365	$438	$350
Gifts/Shopping	$161	$86	$334	$112	$102	$163	$109	$99
Entertainment/ Recreation	$39	$35	$76	$17	$37	$26	$42	$23
Local Travel	$144	$122	$198	$126	$126	$141	$158	$116
Total Per Party*	$1,281	$1,104	$1,653	$1,163	$1,214	$1,382	$1,852	$1,287
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$610	$502	$719	$612	$578	$728	$926	$644
Total Per Person/ Per Day	$174	$157	$189	$180	$170	$227	$265	$195
Lodging	$82	$78	$73	$95	$88	$113	$158	$106
Restaurant/Bar	$46	$45	$47	$45	$45	$60	$63	$53
Gifts/Shopping	$22	$12	$38	$17	$14	$27	$16	$15
Entertainment/ Recreation	$5	$5	$9	$3	$5	$4	$6	$4
Local Travel	$20	$17	$23	$19	$18	$23	$23	$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: 3ʳᵈ Quarter 2008

Visitor Expenditures+	Pleasure							
	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Average Expenditure Per Visit								
Lodging	$655	$569	$679	$792	$647	$799	$1,364	$781
Restaurant/Bar	$402	$342	$503	$370	$330	$490	$594	$418
Gifts/Shopping	$316	$148	$511	$378	$119	$288	$230	$162
Entertainment/ Recreation	$62	$43	$98	$53	$46	$40	$90	$40
Local Travel	$156	$101	$230	$158	$125	$151	$198	$140
Total Per Party*	$1,591	$1,202	$2,020	$1,751	$1,267	$1,768	$2,475	$1,541
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$612	$462	$722	$761	$469	$769	$952	$593
Total Per Person/ Per Day	$157	$128	$185	$173	$142	$213	$212	$165
Lodging	$65	$61	$62	$78	$73	$97	$117	$83
Restaurant/Bar	$40	$37	$46	$37	$37	$59	$51	$45
Gifts/Shopping	$31	$16	$47	$37	$13	$35	$20	$17
Entertainment/ Recreation	$6	$5	$9	$5	$5	$5	$8	$4
Local Travel	$15	$11	$21	$16	$14	$18	$17	$15

* 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: 3rd Quarter 2008

Visitor Expenditures+	Business							
	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Average Expenditure Per Visit								
Lodging	$584	$510	$619	$564	$602	$630	$902	$630
Restaurant/Bar	$300	$286	$334	$270	$311	$300	$339	$300
Gifts/Shopping	$59	$39	$125	$40	$73	$105	$50	$60
Entertainment/ Recreation	$26	$25	$57	$6	$29	$18	$17	$12
Local Travel	$139	$126	$167	$118	$121	$135	$129	$96
Total Per Party*	$1,109	$986	$1,303	$998	$1,137	$1,188	$1,436	$1,098
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$652	$580	$767	$587	$693	$743	$898	$686
Total Per Person/ Per Day	$198	$207	$202	$189	$199	$248	$321	$229
Lodging	$104	$107	$96	$107	$105	$131	$201	$131
Restaurant/Bar	$54	$60	$52	$51	$55	$63	$76	$63
Gifts/Shopping	$11	$8	$19	$8	$13	$22	$11	$13
Entertainment/ Recreation	$5	$5	$9	$1	$5	$4	$4	$3
Local Travel	$25	$26	$26	$22	$21	$28	$29	$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: 3rd Quarter 2008

Planning the Trip to Palm Beach County	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Reason for Trip								
Conference/Convention/ Business Meeting	55.9%	49.9%	46.4%	70.8%	51.1%	62.2%	62.5%	57.9%
- Business Meeting	47.6%	44.8%	40.5%	57.1%	44.4%	56.1%	51.2%	49.7%
- Conference/Convention	8.4%	5.1%	6.0%	13.7%	5.9%	5.7%	11.2%	7.9%
- Other Business	0.0%	0.0%	0.0%	0.0%	0.8%	0.4%	0.1%	0.3%
Vacation/Pleasure	35.9%	43.8%	40.3%	23.4%	37.5%	33.3%	32.7%	36.5%
Sporting Event	1.7%	0.8%	4.4%	0.0%	5.1%	1.0%	2.9%	1.2%
Cultural Event/Attraction	0.3%	0.0%	0.8%	0.0%	0.5%	0.3%	0.3%	0.2%
Film/TV location scouting/production	0.1%	0.0%	0.0%	0.6%	0.5%	0.1%	0.1%	0.1%
Other	6.1%	5.4%	8.1%	5.2%	5.4%	3.1%	1.6%	4.1%
Who Made the Decision*								
Employer	52.1%	47.3%	38.6%	69.0%	46.7%	57.7%	57.7%	54.2%
Head of Household/ Other adult	40.5%	42.1%	54.2%	26.5%	39.6%	34.5%	34.2%	35.6%
Family Living in PBC	6.7%	10.5%	4.6%	4.9%	11.0%	8.2%	7.9%	10.6%
Children Influenced Decision	1.4%	1.7%	2.6%	0.0%	4.7%	1.1%	1.0%	1.1%
Advanced Planning								
One Month or Less	67.2%	67.2%	66.1%	68.2%	60.0%	59.5%	53.0%	52.3%
2 to 3 Months	15.2%	18.4%	14.9%	13.0%	21.1%	21.1%	23.1%	24.8%
More than 3 Months	17.6%	14.4%	19.0%	18.7%	18.9%	19.4%	23.9%	22.9%

* Multiple responses accepted.

Hotel Survey: 3rd Quarter 2008

Planning the Trip to Palm Beach County (Continued)	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	55.1%	49.9%	44.3%	70.8%	50.7%	59.8%	59.6%	56.5%
Visit Friends/Relatives	18.8%	24.2%	21.2%	10.9%	21.1%	22.1%	19.6%	22.5%
Previous Visit	14.0%	11.5%	17.1%	13.7%	9.8%	11.7%	15.1%	11.7%
Beaches	6.5%	8.2%	6.8%	4.7%	8.1%	3.6%	4.6%	6.8%
Special Event	5.1%	5.6%	5.5%	4.2%	7.6%	6.8%	5.7%	11.6%
Weather	4.6%	5.0%	4.6%	5.2%	5.9%	5.4%	6.1%	7.2%
Convenient Flights	4.5%	3.5%	6.5%	3.4%	5.4%	7.3%	5.9%	3.4%
Friends/Relatives recommendation	3.0%	2.6%	3.8%	2.5%	3.5%	2.3%	2.8%	2.4%
Golf/Tennis/Recreation	1.7%	1.4%	2.5%	1.5%	1.8%	1.8%	3.8%	1.8%
Hotel Brochure/Website	1.6%	0.8%	2.9%	1.1%	2.1%	1.2%	0.7%	0.9%
Compete in Sporting Event	1.0%	0.9%	1.7%	0.4%	1.2%	0.7%	0.7%	1.4%
Attraction Brochure/Website	0.6%	0.9%	1.0%	0.0%	2.2%	1.0%	0.3%	0.1%
Other Internet Sources	0.6%	1.3%	0.0%	0.4%	0.7%	0.4%	0.1%	0.3%
PBC-CVB Information/ Website	0.4%	0.0%	0.0%	1.3%	0.1%	0.1%	0.3%	0.5%
Art/Cultural Event	0.4%	0.0%	0.8%	0.4%	0.5%	0.3%	0.4%	0.3%
Attend Sporting Event	0.3%	0.0%	0.8%	0.0%	2.5%	0.3%	1.0%	0.0%
Travel Agency	0.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.4%	0.1%
State Tourist Agency	0.1%	0.0%	0.4%	0.0%	0.1%	0.0%	0.1%	0.0%
Bus Tour	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%
Media Coverage	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Other	6.0%	6.9%	7.7%	3.5%	6.3%	4.3%	3.9%	4.1%

* Multiple responses accepted.

Hotel Survey: 3rd Quarter 2008

Booking Tools	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Booked Trip with Travel Agency								
Yes	23.4%	25.3%	22.8%	21.4%	21.2%	25.0%	21.4%	21.8%
No	76.6%	74.7%	77.2%	78.6%	78.8%	75.0%	78.6%	78.2%
Booked Any Part of Trip Using Internet								
Yes	47.4%	50.7%	50.9%	42.1%	51.2%	51.1%	44.5%	44.6%
No	52.6%	49.3%	49.1%	57.9%	48.8%	48.9%	55.5%	55.4%
Booked Any Part of Trip Using Internet* **(among those who used the Internet)**								
Hotel	82.7%	83.4%	82.4%	82.0%	75.6%	77.7%	64.7%	75.1%
Hotel website	38.0%	30.2%	36.8%	47.7%	39.2%	35.1%	32.9%	38.2%
Expedia	7.7%	6.8%	10.6%	4.7%	4.5%	6.3%	4.1%	2.9%
Travelocity	6.4%	7.1%	8.9%	3.6%	3.4%	6.0%	1.6%	2.9%
Hotwire	3.9%	5.8%	3.3%	1.9%	1.2%	1.3%	2.0%	1.9%
Orbitz	1.7%	2.4%	2.4%	0.0%	1.7%	2.0%	1.0%	3.3%
hotels.com	2.7%	5.0%	1.6%	1.6%	2.5%	1.3%	1.0%	2.7%
Other Website	7.5%	6.7%	8.9%	6.8%	7.0%	10.7%	6.6%	3.6%
Don't Remember	17.7%	22.6%	14.3%	16.8%	16.3%	17.7%	16.4%	20.6%
Air	61.3%	59.9%	60.7%	66.3%	66.3%	69.9%	70.7%	68.4%
Car Rental	37.7%	42.9%	32.5%	40.0%	33.6%	40.0%	37.8%	40.4%
Tickets to Event	0.0%	0.0%	0.0%	0.0%	1.5%	0.8%	1.1%	0.7%
Other	3.9%	5.3%	4.1%	2.0%	0.9%	0.6%	5.7%	3.8%
Visit was Part of Package **(that may have included airfare,lodging,meals,rental car, etc.)**								
Yes	6.2%	3.9%	8.4%	6.8%	3.8%	4.1%	3.7%	5.5%
No	93.8%	96.1%	91.6%	93.2%	96.2%	95.9%	96.3%	94.5%

* Multiple responses accepted.

Hotel Survey: 3rd Quarter 2008

Activity Participation	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Participation in Specific Activities*								
Restaurants	94.7%	91.5%	96.5%	95.8%	92.6%	93.7%	95.5%	93.5%
Shopping	32.2%	31.4%	36.0%	29.2%	32.8%	31.2%	31.1%	28.8%
Went to Beach	30.2%	34.6%	29.8%	26.3%	29.9%	23.2%	25.6%	31.6%
Swimming	22.6%	23.3%	23.9%	20.6%	19.4%	12.5%	11.3%	20.2%
Visited downtown West Palm Beach Attractions/City Place	9.0%	8.8%	10.7%	7.5%	8.8%	9.2%	8.9%	8.6%
Bars/Nightclubs	8.6%	6.9%	7.7%	11.7%	12.4%	12.3%	8.2%	8.7%
Golf, Tennis	7.3%	7.7%	5.9%	8.6%	7.1%	3.8%	12.6%	6.1%
Visited Downtown Delray Beach Attractions	5.2%	8.0%	3.4%	4.9%	4.5%	5.8%	5.3%	5.6%
Visited Mizner Park/Boca Raton	4.3%	6.0%	3.3%	3.6%	4.0%	5.4%	7.3%	5.5%
Boating	2.5%	3.4%	1.4%	2.5%	2.0%	1.2%	1.8%	3.3%
Visited Wildlife Refuge	2.4%	2.2%	2.5%	2.7%	2.6%	2.4%	4.1%	1.9%
Attractions, Tours, Zoo	2.3%	2.6%	2.0%	2.0%	1.6%	1.2%	2.8%	2.0%
Museums, Art Galleries	2.3%	1.7%	2.7%	2.4%	1.4%	1.3%	4.1%	2.7%
Attended a Sporting Event	1.9%	1.6%	2.1%	1.7%	1.3%	1.5%	3.5%	0.4%
Snorkeling	1.7%	2.1%	2.7%	0.4%	1.9%	0.9%	0.0%	1.0%
Visited Downtown at the Gardens	1.5%	0.4%	2.4%	1.7%	1.8%	1.7%	2.8%	2.3%
Visited downtown Lake Worth	1.3%	1.7%	1.0%	1.7%	0.7%	1.0%	1.0%	0.9%
Performing Arts (plays, concerts, dance)	1.3%	1.7%	1.2%	0.8%	1.4%	1.3%	1.1%	0.8%
Fishing	1.1%	1.7%	0.4%	1.2%	1.7%	1.1%	1.3%	1.6%
Visited Palm Beach/Worth Avenue**	1.0%	1.3%	0.0%	2.2%	1.0%	2.8%	3.3%	1.3%
Visited Riviera Beach/Singer Island	1.0%	1.2%	0.8%	0.8%	0.9%	0.3%	1.4%	0.7%
Gambling Cruise	0.7%	1.6%	0.0%	0.4%	1.3%	0.6%	0.7%	1.1%
Diving	0.7%	0.8%	0.8%	0.4%	0.6%	0.7%	0.1%	0.1%
Surfing	0.3%	0.0%	0.0%	1.1%	0.1%	0.1%	0.1%	0.3%
Competed in Sports Event	0.3%	0.0%	0.8%	0.0%	0.6%	0.4%	0.3%	0.0%
Horse Related Activities+	0.1%	0.0%	0.0%	0.4%	N/A	N/A	1.2%	0.4%
Kite Surfing	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.1%	0.3%
Palm Beach County Convention Center	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	0.0%	0.3%
Pari-mutuels (dog-track)	0.0%	0.0%	0.0%	0.0%	0.2%	0.5%	0.1%	0.0%
Other	10.4%	11.3%	14.0%	5.5%	6.3%	10.1%	10.3%	8.7%

*Multiple responses accepted.   ** Added in August 2007   +Added in January 2008

Hotel Survey: 3rd Quarter 2008

Return Visits	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Plan to Return to PBC								
Yes	85.4%	84.8%	85.4%	85.7%	87.2%	84.3%	83.0%	82.3%
No	3.1%	4.5%	1.2%	3.9%	1.4%	3.0%	2.6%	3.3%
Don't know	11.5%	10.7%	13.4%	10.4%	11.4%	12.6%	14.4%	14.4%
If no, why not?* (Top mentions – 4% or higher)	n = 23	n = 11**	n = 3**	n = 10**	n = 10	n = 22	n = 19	n = 24
No business in the area	17.6%	3	0	1	28.9%	30.8%	20.3%	12.9%
Don't like Palm Beach/U.S.	12.8%	1	0	3	10.0%	4.0%	0.0%	4.0%
Family moving away	8.9%	2	0	0	0.0%	0.0%	0.0%	0.0%
Too far	8.8%	2	0	0	0.0%	14.0%	5.3%	0.0%
Terminated from work	4.3%	0	1	0	0.0%	0.0%	0.0%	0.0%
No reason/No answer	47.6%	3	2	6	38.2%	38.3%	43.1%	67.5%
When do you plan on returning to PBC?								
Within the next 3 months	35.1%	39.4%	24.8%	40.5%	36.0%	36.3%	30.2%	34.9%
Within the next 6 months	13.9%	12.0%	18.2%	10.2%	11.2%	8.7%	11.4%	9.7%
Within the next year	21.0%	23.1%	23.5%	16.6%	21.2%	19.6%	31.9%	25.0%
Within the next few years	3.6%	2.8%	4.9%	3.5%	4.6%	7.4%	3.0%	4.8%
Don't Know	26.4%	22.7%	28.6%	29.2%	27.1%	28.0%	23.5%	25.7%

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

Hotel Survey: 3ʳᵈ Quarter 2008

Travel Details	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Main Destination								
Palm Beach County	90.9%	89.0%	90.5%	93.0%	91.0%	91.8%	92.1%	91.3%
First Trip to PBC	24.8%	21.9%	28.2%	24.4%	25.3%	26.2%	26.2%	29.0%
Type of Transportation*								
Airplane	69.1%	67.4%	70.2%	70.2%	65.1%	75.9%	82.5%	74.4%
Car	35.6%	37.4%	34.7%	34.4%	38.9%	29.7%	22.7%	30.5%
Other	0.5%	0.0%	1.2%	0.4%	0.4%	0.2%	0.5%	0.8%

*Multiple responses accepted.

Hotel Survey: 3rd Quarter 2008

Attitudes about Trip to Palm Beach County	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Things Liked Best – Top Mentions								
Climate/Weather	26.6%	26.0%	20.6%	34.4%	25.9%	42.5%	52.4%	34.7%
Beaches/Ocean	17.0%	17.8%	20.6%	13.1%	17.7%	12.2%	8.6%	15.0%
Beautiful/Nice Area	9.3%	6.2%	13.1%	8.6%	10.1%	5.5%	4.9%	9.4%
Nice People	6.6%	5.6%	6.4%	7.4%	5.9%	4.7%	3.4%	4.1%
Relaxing Atmosphere	4.7%	5.5%	4.0%	4.9%	3.0%	4.3%	3.6%	3.3%
Cleanliness	4.1%	2.5%	6.8%	2.4%	3.7%	3.1%	3.6%	2.7%
Hotel	3.5%	6.0%	1.9%	2.6%	3.9%	1.6%	2.0%	2.4%
Visiting Family/Friends	3.3%	5.3%	3.5%	0.9%	4.2%	5.4%	4.0%	4.4%
Restaurant/Food	2.6%	1.5%	3.9%	2.6%	2.8%	2.2%	2.4%	3.1%
Everything	2.4%	1.5%	4.2%	1.5%	1.6%	1.8%	0.3%	2.9%
Location	2.3%	2.6%	1.0%	3.4%	1.8%	3.3%	1.2%	2.6%
Palm Trees	1.8%	1.6%	2.0%	1.9%	2.7%	0.9%	1.6%	2.5%
Golf	1.7%	2.6%	0.0%	2.6%	1.2%	0.5%	1.7%	1.5%
Good business opportunities/customers	1.5%	1.1%	1.0%	2.5%	0.5%	0.4%	0.2%	0.8%
Shopping	1.2%	2.0%	1.0%	0.5%	2.5%	1.9%	1.1%	1.5%
Diversity of Activities/Cultural Events	1.2%	2.0%	0.5%	0.9%	0.2%	0.3%	0.5%	0.2%
City Place	1.0%	2.1%	0.9%	0.0%	1.5%	1.0%	0.2%	1.1%
Other	9.5%	8.2%	8.7%	9.2%	11.4%	8.5%	9.1%	8.8%

Hotel Survey: 3rd Quarter 2008

Attitudes about Trip to Palm Beach County	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Things Liked Least – Top Mentions								
Humidity/Poor Weather	30.1%	30.8%	30.8%	28.3%	25.1%	14.2%	10.2%	21.7%
Traffic/Bad Drivers	23.1%	23.0%	19.4%	26.5%	26.7%	34.2%	35.4%	26.4%
Expensive	4.4%	4.2%	5.6%	3.2%	6.1%	3.5%	8.0%	5.5%
Unfriendly people	3.3%	2.4%	3.3%	3.9%	1.6%	1.3%	1.4%	3.3%
Crowded	2.4%	1.7%	2.0%	3.2%	1.0%	5.1%	3.6%	2.5%
Stay Was Too Short	1.9%	2.5%	2.6%	0.6%	2.2%	2.5%	3.8%	1.4%
Difficulty locating places	1.5%	2.7%	1.8%	0.0%	2.0%	1.2%	0.6%	1.3%
Hotel (general)	1.1%	0.0%	1.8%	2.1%	2.1%	1.4%	2.6%	1.2%
Road Construction	1.1%	0.8%	0.0%	3.1%	5.3%	3.6%	5.2%	2.7%
Work	1.1%	0.0%	1.6%	1.6%	0.8%	0.6%	0.0%	2.5%
Bad neighborhoods/crime	0.8%	0.0%	0.0%	2.4%	3.2%	2.5%	1.8%	2.3%
Other	18.2%	16.3%	22.7%	14.8%	15.1%	21.0%	22.4%	23.7%
Nothing liked least	11.4%	15.9%	8.4%	10.1%	8.6%	9.0%	6.0%	5.4%

Hotel Survey: 3rd Quarter 2008

What one activity did you do on a recent trip that you wish you could do in Palm Beach County? (Top mentions)	Total 3Q2008	July 2008	Aug. 2008	Sept. 2008
Activities Available Currently in PBC				
Golf	16.4%	17.4%	14.9%	16.5%
Beach	9.5%	12.4%	7.7%	8.8%
Fish/Deep sea fishing	6.3%	1.7%	11.9%	4.9%
Relax	5.0%	1.7%	6.6%	6.5%
Boating	4.0%	5.5%	4.9%	1.4%
Shopping	3.9%	5.0%	4.6%	1.8%
Snorkel	3.6%	2.1%	2.9%	5.3%
Swim	3.4%	3.6%	1.5%	6.1%
Sightseeing/Visiting Historical Sights	3.4%	1.7%	6.5%	1.8%
Surf	2.3%	0.0%	3.0%	4.5%
Jet Ski	2.2%	3.5%	3.1%	0.0%
Kayak	1.7%	0.0%	3.1%	1.8%
Museums (ns)	1.6%	0.0%	2.7%	1.8%
Sail	1.6%	0.0%	0.0%	4.9%
Visit family/friends	1.6%	0.0%	3.0%	1.4%
Dive	1.5%	0.0%	2.9%	1.4%
Airboat ride	1.2%	3.8%	0.0%	0.0%
Walk	1.1%	0.0%	0.0%	3.5%
Parasail	1.0%	0.0%	0.0%	3.2%
Other (including horseback riding, going to a water park, etc.)	12.6%	18.3%	5.8%	13.6%
Activities Not Available Currently in PBC				
Gamble	3.9%	1.7%	3.0%	6.3%
Amusement Parks/Roller coasters	2.3%	5.3%	1.4%	0.0%
Hike	2.1%	1.8%	4.4%	0.0%
Other (including, mountain climbing, attending a major league baseball game etc.)	5.2%	8.5%	1.4%	5.0%
Nothing	3.3%	5.3%	4.3%	0.0%

Hotel Visitor Survey: 3rd Quarter 2008

Where did you go on your last vacation?+	Total 3Q2008	July 2008	Aug. 2008	Sept. 2008
Domestic	**64.5%**	**68.9%**	**63.4%**	**58.0%**
Florida	25.6%	27.3%	25.0%	23.0%
Southeast (Excluding Florida)	12.5%	15.5%	9.2%	14.2%
Far West	10.2%	9.0%	11.9%	9.6%
New England	5.1%	7.8%	3.9%	2.0%
Midwest	4.4%	1.5%	5.5%	6.8%
Mid Atlantic	3.4%	4.8%	4.0%	0.0%
New York	3.3%	2.9%	3.9%	2.3%
International	**33.4%**	**31.1%**	**36.6%**	**32.9%**
Latin America/Caribbean	16.6%	13.6%	20.2%	14.7%
Europe	12.2%	10.8%	12.1%	16.1%
England/UK	2.8%	1.5%	4.4%	2.5%
Germany	1.1%	3.1%	0.0%	0.0%
Australia/Asia	1.8%	3.4%	1.3%	0.0%
Africa	1.5%	1.5%	1.2%	2.0%
Middle East	0.7%	1.8%	0.0%	0.0%
Canada	0.7%	0.0%	1.9%	0.0%
No Answer	**2.1%**	**0.0%**	**0.0%**	**9.2%**

+ Among vacation/leisure visitors only

Hotel Visitor Survey: 3rd Quarter 2008

Other destinations considered when planning leisure visit to Palm Beach County?*+	Total 3Q2008	July 2008	Aug. 2008	Sept. 2008
Domestic	**40.5%**	**28.2%**	**44.7%**	**67.5%**
Florida	37.4%	24.7%	41.2%	67.5%
Far West	1.5%	1.7%	1.8%	0.0%
Mid Atlantic	0.8%	1.8%	0.0%	0.0%
Southeast (Excluding Florida)	0.8%	0.0%	1.8%	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	**1.7%**	**0.0%**	**0.0%**	**18.3%**
Europe	0.9%	0.0%	0.0%	11.1%
Germany	0.0%	0.0%	0.0%	0.0%
England/UK	0.0%	0.0%	0.0%	0.0%
Latin America/Caribbean	0.8%	0.0%	0.0%	7.1%
Canada	0.0%	0.0%	0.0%	0.0%
Australia/Asia	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	**57.8%**	**71.8%**	**55.3%**	**14.3%**

* Multiple responses accepted
+ Among vacation/leisure visitors only

Hotel Visitor Survey: 3rd Quarter 2008

How does this visit to Palm Beach County compare to your last vacation in terms of…?+	Total 3Q2008	July 2008	Aug. 2008	Sept. 2008
Being a great place to go again and again				
Palm Beach County is much better	32.7%	35.8%	26.6%	41.2%
Palm Beach County is about the same	57.8%	55.6%	60.0%	55.4%
Palm Beach County is much worse	9.5%	8.6%	13.3%	3.4%
Being able to always find a new place to see or a new thing to do				
Palm Beach County is much better	26.4%	30.9%	22.6%	23.9%
Palm Beach County is about the same	63.3%	58.2%	66.2%	66.2%
Palm Beach County is much worse	10.3%	10.9%	11.3%	9.9%
Being appreciated as a tourist or visitor				
Palm Beach County is much better	28.7%	28.8%	25.6%	32.2%
Palm Beach County is about the same	63.0%	65.3%	62.5%	60.5%
Palm Beach County is much worse	8.3%	5.9%	11.9%	7.3%
Being a good value				
Palm Beach County is much better	31.2%	34.7%	35.1%	11.2%
Palm Beach County is about the same	58.1%	58.3%	49.8%	76.5%
Palm Beach County is much worse	10.7%	7.0%	15.1%	12.3%
Being great for historical sights and places				
Palm Beach County is much better	22.1%	29.7%	17.5%	10.4%
Palm Beach County is about the same	64.8%	58.8%	65.4%	77.4%
Palm Beach County is much worse	13.1%	11.6%	17.0%	12.3%
Being great for discovering nature-based activities/ecotourism				
Palm Beach County is much better	26.2%	34.3%	22.0%	11.3%
Palm Beach County is about the same	63.8%	57.4%	64.9%	78.5%
Palm Beach County is much worse	10.0%	8.3%	13.1%	10.2%
Being great for museums and other cultural activities				
Palm Beach County is much better	22.4%	27.2%	21.3%	10.4%
Palm Beach County is about the same	69.2%	67.1%	67.3%	77.4%
Palm Beach County is much worse	8.4%	5.7%	11.4%	12.3%

+ Among vacation/leisure visitors only

Hotel Survey: 3rd Quarter 2008

Characteristics of Visitors	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Age								
Under 35	19.0%	19.6%	20.5%	17.3%	20.5%	15.6%	13.0%	17.5%
35 to 54	53.0%	52.1%	51.1%	55.1%	55.3%	53.7%	56.3%	56.8%
55 to 64	19.7%	18.8%	19.3%	21.6%	18.7%	23.9%	19.6%	19.0%
65 +	8.3%	9.4%	9.1%	6.0%	5.5%	6.9%	11.1%	6.8%
Occupation								
Professional/Managerial	58.5%	61.0%	56.7%	57.2%	63.7%	58.8%	63.4%	61.6%
Sales	16.3%	15.5%	16.4%	17.5%	13.5%	15.9%	12.4%	15.4%
Retired	9.3%	11.0%	8.6%	8.6%	7.7%	9.5%	12.3%	9.3%
Technical	6.6%	5.4%	8.1%	6.4%	7.4%	7.8%	7.4%	6.4%
Student	1.2%	0.8%	2.0%	0.8%	2.0%	1.4%	0.5%	0.9%
Other	8.0%	6.3%	8.1%	9.4%	6.1%	6.5%	3.9%	6.4%
Hispanic Origin	7.1%	7.7%	8.4%	5.1%	6.6%	5.6%	4.3%	6.1%
Ethnicity								
White/Caucasian	89.0%	89.8%	87.6%	89.8%	92.9%	92.4%	93.8%	91.2%
African-American/Black	8.4%	6.7%	10.1%	8.1%	5.3%	4.5%	3.3%	5.9%
Asian	2.1%	3.4%	1.7%	1.2%	1.5%	2.8%	2.8%	2.7%
Other	0.4%	0.0%	0.6%	0.9%	0.3%	0.3%	0.1%	0.3%

Hotel Survey: 3rd Quarter 2008

Characteristics of Visitors (Continued)	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Income								
Under $45,000	2.8%	2.8%	2.8%	2.7%	5.6%	3.1%	1.2%	4.0%
$45,000 to $64,999	7.8%	8.7%	8.0%	6.9%	9.9%	9.3%	4.7%	8.2%
$65,000 to $99,999	24.1%	25.0%	25.3%	22.1%	23.8%	23.2%	18.8%	22.2%
$100,000 to $200,000	45.4%	43.8%	44.6%	48.0%	41.3%	38.9%	44.2%	42.6%
Over $200,000	20.0%	19.7%	19.4%	20.4%	19.4%	25.5%	31.0%	23.0%
Gender								
Male	61.2%	58.8%	58.8%	67.6%	59.2%	60.9%	59.4%	59.6%
Female	38.8%	41.2%	41.2%	32.4%	40.8%	39.1%	40.6%	40.4%

Hotel Survey: 3rd Quarter 2008

Description of Travel Party*	Total Hotel Guests							
	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Adult family members or friends	40.7%	44.8%	47.5%	30.9%	46.9%	34.7%	39.3%	38.1%
Self Only	38.7%	34.2%	37.5%	43.6%	34.7%	42.5%	36.4%	39.9%
Business Associates	19.7%	19.6%	14.1%	25.6%	16.7%	21.9%	22.8%	20.5%
Children <12 years of age	7.9%	10.3%	8.4%	4.8%	10.1%	3.8%	6.3%	8.9%
Grandchildren <12 years of age	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%	0.0%	0.2%

Description of Travel Party*	Pleasure Hotel Guests							
	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Adult family members or friends	81.5%	82.7%	81.6%	80.7%	84.2%	79.1%	84.6%	78.4%
Children under 12 years of age	15.8%	19.0%	14.5%	10.4%	19.7%	7.6%	15.9%	18.3%
Self Only	14.9%	14.3%	15.7%	13.3%	9.8%	17.9%	10.7%	16.5%
Business Associates	1.2%	0.0%	0.9%	4.0%	2.1%	1.0%	0.8%	1.0%
Grandchildren <12 years of age	0.0%	0.0%	0.0%	0.0%	0.9%	0.7%	0.0%	0.4%

Description of Travel Party*	Business Hotel Guests							
	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Self Only	54.7%	51.9%	58.4%	53.4%	56.0%	56.6%	50.9%	55.6%
Business Associates	32.0%	37.1%	26.9%	32.2%	30.1%	33.9%	35.1%	33.4%
Adult family members or friends	13.6%	10.9%	14.7%	15.0%	14.2%	9.3%	13.8%	11.1%
Children under 12 years of age	2.8%	2.5%	2.8%	3.3%	1.9%	1.6%	1.0%	2.6%
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: 3ʳᴰ Quarter 2008

Place of Origin	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Domestic	**87.5%** **(n=645)**	**91.1%**	**82.2%**	**89.3%**	**91.3%** **(n=674)**	**88.1%** **(n=648)**	**91.2%** **(n=669)**	**89.6%** **(n=662)**
Florida	25.0% (n=184)	25.9%	22.7%	25.5%	30.7% **(n=227)**	22.2% (n=163)	12.3% (n=91)	23.8% (n=176)
Southeast (excluding Florida)	19.2% (n=142)	18.9%	19.9%	19.0%	16.2% **(n=120)**	15.4% (n=113)	17.3% (n=127)	19.8% (n=146)
Mid Atlantic	11.9% (n=88)	16.2%	9.0%	10.6%	13.5% **(n=100)**	12.3% (n=91)	15.3% (n=112)	9.9% (n=73)
Midwest	10.4% (n=77)	10.7%	9.2%	11.3%	12.4% **(n=91)**	11.2% (n=82)	18.7% (n=137)	11.8% (n=88)
New York	9.2% (n=68)	6.8%	10.7%	10.5%	7.8% **(n=57)**	10.4% (n=77)	12.8% (n=94)	10.4% (n=77)
New England	5.9% (n=44)	5.3%	6.0%	6.6%	5.5% **(n=41)**	9.4% (n=69)	7.1% (n=52)	6.5% (n=48)
Far West	5.8% (n=43)	7.2%	4.8%	5.8%	5.2% **(n=38)**	7.2% (n=53)	7.6% (n=56)	7.3% (n=54)
International	**12.5%** **(n=92)**	**8.9%**	**17.8%**	**10.7%**	**8.7%** **(n=64)**	**11.9%** **(n=87)**	**8.8%** **(n=65)**	**10.4%** **(n=77)**
Europe (net)	5.8% (n=43)	2.8%	9.5%	5.4%	3.0% **(n=22)**	6.6% (n=48)	3.4% (n=25)	4.2% (n=31)
- Germany	1.2% (n=9)	1.2%	1.5%	0.8%	0.1% **(n=1)**	0.8% (n=6)	0.3% (n=2)	0.9% (n=7)
- England/UK	1.0% (n=8)	0.4%	2.0%	0.7%	1.0% **(n=7)**	3.7% (n=27)	1.4% (n=10)	1.5% (n=11)
Latin America / Caribbean	3.0% (n=22)	2.4%	4.0%	2.4%	3.5% **(n=26)**	2.1% (n=15)	1.3% (n=9)	1.9% (n=14)
Canada	2.4% (n=18)	2.5%	3.1%	1.8%	1.0% **(n=8)**	2.0% (n=15)	3.2% (n=24)	3.0% (n=22)
Middle East	0.6% (n=4)	0.0%	0.8%	0.8%	0.3% **(n=2)**	0.4% (n=3)	0.1% (n=1)	0.9% (n=7)
Africa	0.4% (n=3)	0.4%	0.4%	0.3%	0.0% **(n=0)**	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)
Australia/Asia	0.3% (n=2)	0.8%	0.0%	0.0%	0.8% **(n=6)**	0.8% (n=6)	0.8% (n=6)	0.4% (n=3)

Hotel Survey: 3ʳᵈ Quarter 2008

Pleasure Vs. Business By Selected Place of Origin	Total 3Q 2008	July	Aug.	Sept.	Total 3Q 2007	Total 4Q 2007	Total 1Q 2008	Total 2Q 2008
Florida	**25.0%**	**25.9%**	**22.7%**	**25.5%**	**30.7%**	**22.2%**	**12.3%**	**23.8%**
Business	14.1%	9.7%	11.6%	20.2%	18.8%	14.6%	9.5%	15.3%
Pleasure	10.1%	16.2%	9.5%	4.0%	11.2%	7.6%	2.9%	8.3%
Southeast (excluding Florida)	**19.2%**	**18.9%**	**19.9%**	**19.0%**	**16.2%**	**15.4%**	**17.3%**	**19.8%**
Business	12.6%	12.6%	10.8%	14.6%	10.2%	12.9%	13.4%	13.8%
Pleasure	6.3%	6.5%	7.9%	4.5%	6.1%	2.4%	4.0%	5.8%
Mid Atlantic	**11.9%**	**16.2%**	**9.0%**	**10.6%**	**13.5%**	**12.3%**	**15.3%**	**9.9%**
Business	6.0%	6.9%	3.7%	7.3%	5.0%	6.7%	7.1%	4.1%
Pleasure	6.0%	9.3%	5.4%	3.2%	8.4%	5.6%	8.0%	5.7%
Midwest	**10.4%**	**10.7%**	**9.2%**	**11.3%**	**12.4%**	**11.2%**	**18.7%**	**11.8%**
Business	6.7%	7.7%	3.3%	8.9%	6.1%	7.1%	12.0%	7.4%
Pleasure	3.8%	3.2%	5.8%	2.4%	6.4%	3.8%	6.8%	4.2%
New York	**9.2%**	**6.8%**	**10.7%**	**10.5%**	**7.8%**	**10.4%**	**12.8%**	**10.4%**
Business	3.8%	1.6%	4.1%	6.1%	2.4%	4.9%	6.1%	3.8%
Pleasure	5.3%	5.3%	6.6%	4.0%	5.3%	5.6%	6.5%	6.5%
New England	**5.9%**	**5.3%**	**6.0%**	**6.6%**	**5.5%**	**9.4%**	**7.1%**	**6.5%**
Business	2.6%	3.2%	0.8%	3.6%	2.8%	4.8%	4.0%	2.2%
Pleasure	3.1%	2.0%	5.0%	2.8%	2.6%	4.6%	3.0%	4.5%
Far West	**5.8%**	**7.2%**	**4.8%**	**5.8%**	**5.2%**	**7.2%**	**7.6%**	**7.3%**
Business	4.3%	5.3%	3.3%	4.9%	1.4%	4.2%	5.6%	5.5%
Pleasure	13.6%	2.0%	1.2%	1.2%	3.8%	3.0%	2.0%	1.6%