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Report on Palm Beach County Tourism
Third Quarter 2009
(July, August, and September)

Prepared for:
Tourist Development Council of Palm Beach County

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Introduction: 3rd Quarter 2009

Background

- **The following report contains information collected during the 3rd Quarter of 2009 (July, August and September), fourth quarter of Fiscal Year 2008/2009.**
- **Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.**

Property Manager Survey: 3rd Quarter 2009

Occupancy Rates

- **In the third quarter of 2009, the average occupancy rate for responding Palm Beach County hotels was 51.9%, a decrease of 1.7 percentage points from the same quarter last year (53.6%).**
  - In 3Q2009, the average occupancy rate was significantly higher among larger (101+ rooms) properties (55.0%) than among smaller (50-100 rooms) properties (36.4%)*.
  - Among smaller hotels (50-100 rooms), the average occupancy rate decreased by 4.5 percentage points compared to the same quarter last year, from 40.9% to 36.4%, and decreased by 12.4 percentage points compared with last quarter, from 48.8% to 36.4%.
  - Among larger hotels (101+ rooms), the average occupancy rate decreased by 1.0 percentage point compared to the same quarter last year, from 56.0% to 55.0%, and decreased by 4.8 percentage points compared with last quarter, from 59.8% to 55.0%.
- **In 3Q2009, the average occupancy rate among properties in the Northern region (54.9%) was slightly higher than the occupancy rate among properties in the Central (52.4%) and Southern (50.8%) regions of Palm Beach County.**
  - Relative to the same quarter last year, in 3Q2009 the average occupancy rate of hotels in the Northern and Central regions remained at relative parity (Northern – from 53.9% to 54.9%; Central – from 53.5% to 52.4%), while hotels in the Southern region of Palm Beach County experienced a slight decrease in average occupancy rate (Southern – down 2.8 percentage points from 53.6% to 50.8%).
  - Additionally, the average occupancy rate decreased among properties in all three regions compared to last quarter, with the most significant decrease occurring in the Central region (Central – a 7.3 percentage point decrease from 59.7%, Northern – a 5.6 percentage point decrease from 60.5%, Southern – a 4.6 percentage point decrease from 55.4%).
- **During the third quarter of 2009, the approximate number of hotel room nights occupied** was 708,976 – a decrease of 18,560 (2.6%) room nights relative to last year (727,536) and a decrease of 80,919 (10.2%) room nights compared to last quarter (789,895).**
- **According to hotel managers surveyed in 3Q2009, 7.0% of hotel guests traveled internationally. This is comparable to last quarter (7.0%) and the same quarter last year (8.0%).**
  - Property managers from smaller hotels (50-100 rooms)* stated that, on average, 15.9% of their guests traveled from outside of the United States, while managers from larger properties (101+ rooms) claimed that, on average, 5.7% of their guests were international travelers.
  - In the third quarter of 2009, property managers from the Central region of Palm Beach County reported that 7.5% of guests traveled internationally; this represents the highest percentage of international travelers in that region for any quarter in the past year. Property managers from the Northern region of PBC reported that 2.1% of guests traveled internationally; this represents the lowest percentage of international travelers in that region for any quarter in the past year. Managers from the Southern region reported that 7.9% of guests traveled internationally; this represents a decrease of 4.1 percentage points compared to the same quarter last year (12.0%) and is at parity with last quarter (7.9%).

* Please note that the response rate for hotels with 50-100 rooms was low in July (25.0%), August (26.2%) and September (27.5%).
** Properties well below 50 rooms are only included in room count and total inventory.

Property Manager Survey: 3rd Quarter 2009

Occupancy Rates (cont'd)

- **During 3Q2009, leisure travelers occupied the greatest percentage of room nights in Palm Beach County (43.9%), a 7.3 percentage point increase from last year (36.6%). Business travelers occupied 30.5% of room nights, which is a decrease of 6.4 percentage points when compared to last year (36.9%). Convention/group travelers occupied 25.6% of 3Q2009 hotel room nights, which is at parity with 3Q2008 (26.5%).**
  - During the past year, the percentage of business travelers occupying rooms in Palm Beach County decreased each quarter. As such, the percentage of business travelers in 3Q2009 (30.5%) is the lowest of any quarter in the prior year (3Q2008 – 36.9%; 4Q2008 – 34.4%; 1Q2009 – 32.9%; 2Q2009 – 32.8%).
- **Hotel managers specifically from convention hotels reported that 30.0% of their reservations were made by convention/group travelers, at parity with last year (30.3%) and last quarter (28.9%).**

Average Daily Room Rate (ADR)

- **As reported by participating Palm Beach County property managers, the ADR for PBC properties in 3Q2009 was $98.63 – this represents an 18.7% ($22.76) decrease compared to last year ($121.39) and a 25.1% ($33.07) decrease compared to last quarter ($131.70).**
  - In 3Q2009, the ADR from both smaller (50-100 rooms)* and larger properties (101+ rooms) was the lowest of any quarter within the past year. Hotel managers of smaller properties (50-100 rooms) reported an ADR of $91.89, a decrease of 18.0 percentage points when compared to last year ($112.09), and hotel managers of larger properties (101+ rooms) reported an ADR of $99.90, a decrease of 19.0 percentage points when compared to last year ($123.30).
    - Within the larger properties, managers at hotels with 101-219 rooms reported an ADR of $70.89, a decrease of 23.6 percentage points from 3Q2008 ($92.83); hotel managers at hotels with 220-500 rooms cited an ADR of $112.07, a decrease of 21.8 percentage points from 3Q2008 ($143.28).
  - When compared to the previous quarter, hotel managers of larger properties (101+ rooms) reported larger decreases in ADR (down 26.6 percentage points, from $136.19 in 2Q2009 to $99.90 in 3Q2009) than managers of smaller properties (50-100 rooms) who reported a decrease of 14.2 percentage points when compared to last quarter (from $107.10 in 2Q2009 to $91.89 in 3Q2009).

* Please note that the response rate for hotels with 50-100 rooms was low in July (25.0%), August (26.2%) and September (27.5%).

Property Manager Survey: 3rd Quarter 2009

Future Business Outlook

- **Regarding the business outlook for the next two months as relative to the same months last year, most responding hotel managers expect a decrease in Total Room Revenue (82.3%), Group/Individual Business Room Revenue (82.3%), and Individual Vacation Room Revenue (79.8%).***
  - Among hotel managers who anticipate a decrease in room revenue relative to the previous year, the average decrease predicted is 21.0% in Total Revenue and 21.4% in both Group/Individual Business Revenue and Individual Vacation Revenue.*
  - Among the 9% of hotel managers who expect an increase in room revenue compared to the previous year, the average increase projected is 19.9%** in Total Revenue, 23.4%** in Group/Individual Business Revenue, and 9.9% in Individual Vacation Revenue.*
- **When predicting changes in room revenue three and four months ahead, compared to the same months last year, most responding hotel managers are expecting a decrease in Total Room Revenue (79.5%), Group/Individual Business Room Revenue (75.3%), and Individual Vacation Room Revenue (74.5%).***
  - Among hotel managers who expect a decrease in room revenue compared to the prior year, the average decrease predicted is 20.0% in Total Revenue, 21.7% in Group/Individual Business Revenue, and 21.8% in Individual Vacation Revenue.*
  - Among the 7% of hotel managers who anticipate an increase in room revenue relative to the previous year, the average increase forecast is 10.7% in Total Revenue, 13.0% in Group/Individual Business Revenue, and 8.1% in Individual Vacation Revenue.*

Bookings Via Third Party Websites

- **According to hotel managers, an average of 15.2% of Palm Beach County hotel bookings were made through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc.) in 3Q2009; this represents a slight decrease from last year and last quarter (both 18.4%).**
  - In 3Q2009, there were more third party bookings at larger hotels (101+ rooms; 15.3%) than at smaller hotels (50-100 rooms; 10.3%).

Market Focus

- **As in prior quarters, the major focus for hotel managers, in terms of marketing, advertising and promotion, was on the Florida Leisure Drive Market (87.7%).**
- **When asked about the greatest challenges for the remainder of 2009, responding hotel managers most often mentioned maintaining rates/ADR. A full, detailed list can be found on pages 23**.

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

Hotel Visitor Survey: 3rd Quarter 2009

Characteristics of Stay

- **During the third quarter of 2009, the average party size of PBC visitors was 2.1 and the median party size was 2.0*, both exactly the same as the same quarter last year.**
- **PBC visitors spent 2.8 nights on average in a hotel during 3Q2009, which represents the lowest average number of nights guests have stayed in PBC hotels in any quarter within the past year (3Q2008 – 3.5; 4Q2008 – 3.7; 1Q2009 – 3.9; 2Q2009 – 3.6). Surveyed hotel guests occupied an average of 1.3 rooms per night* in 3Q2009; at parity with last year (1.3) and last quarter (1.2).**

Planning the Trip to Palm Beach County

- **More than one-half (54.3%) of hotel guests surveyed in 3Q2009 cited a business trip (conference/convention/business meeting) as their reason for visiting PBC, while one-third cited vacation/pleasure (33.6%).**
  - The percentage of surveyed hotel guests visiting PBC for either business or leisure/pleasure decreased slightly compared to the prior year (from 55.9% to 54.3% business, from 35.9% to 33.6% leisure), while the percentage of surveyed guests visiting for a sporting event increased slightly (from 1.7% in 3Q2008 to 3.5% in 3Q2009).
- **Approximately one-half of surveyed hotel visitors cited 'Work Related Trip' as the reason they selected Palm Beach County instead of another destination (50.7%). 'Visit Friends/Relatives' (23.0%) and/or 'Previous Visit' (13.8%) were other popular reasons for selecting PBC.**
  - The percentage of surveyed visitors citing 'Work Related Trip' as a reason for selecting PBC over other destinations decreased compared to last year (55.1%) and last quarter (52.2%). The citing of 'Visit Friends/Relatives' increased compared to last year (18.8%) and last quarter (20.3%).
- **In 3Q2009, more participating hotel guests cited the head of household/other adult as the decision maker regarding the trip to PBC (50.0%) than cited employer as the decision maker (43.3%). In all previous quarters within the past year, a greater percentage of guests had cited employer as the decision maker.**
  - Fewer visitors cited 'Employer' as the decision maker (43.3%) in 3Q2009 than in all previous quarters within the past year (3Q2008 – 52.1%; 4Q2008 – 57.2%, 1Q2009 – 50.4%, 2Q2009 – 52.2%). Conversely, more visitors cited 'Head of Household/Other Adult' as the decision maker regarding the trip to Palm Beach County (50.0%) in 3Q2009 than in all previous quarters within the past year (3Q2008 – 40.5%; 4Q2008 – 38.1%, 1Q2009 – 44.8%, 2Q2009 – 39.9%)
- **Nearly two-thirds of 3Q2009 surveyed hotel guests planned their trip to Palm Beach County one month or less in advance (64.0%), a decrease compared to this same quarter last year (67.2%) but an increase compared to last quarter (58.8%).**

* 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.

Booking a Trip to Palm Beach County

- **Two-in-ten participating hotel guests utilized a travel agent (20.9%) to book their trip to PBC in 3Q2009, fewer than in any quarter in the past year (3Q2008 – 23.4%; 4Q2008 – 25.7%; 1Q2009 – 23.2%; 2Q2009 – 24.4%). Also of note, the percentage of guests booking their trip through a travel agency decreased slightly in every month of 3Q2009 (July – 22.1%; Aug. – 21.3%; Sept. – 20.0%).**

- **In 3Q2009, the percentage of hotel visitors reporting to have booked at least part of their trip to PBC on the Internet (54.6%) was at parity with last quarter (54.9%), but increased relative to the same quarter last year (47.4%) .**
  - More than eight-in-ten surveyed hotel guests who utilized the Internet to book any part of their trip to PBC did so to book hotel rooms (83.7%), nearly half reserved airfare (48.7%), and three-in-ten used the Internet to book a rental car (29.3%).
  - More PBC visitors reserved hotel rooms via the Internet in 3Q2009 (83.7%) than in all previous quarters within the past year (3Q2008 – 82.7%; 4Q2008 – 81.0%; 1Q2009 – 76.7%; 2Q2009 – 81.3%). However, the percentage of guests using the Internet to reserve airfare (48.7%) decreased significantly relative to previous quarters (3Q2008 – 61.3%; 4Q2008 – 66.0%; 1Q2009 – 68.8%; 2Q2009 – 60.4%).
  - In 3Q2009, hotel guests who reserved their hotel rooms online most frequently did so via specific hotel websites (43.8%), an increase compared to the prior quarter (36.2%) and year (38.0%).
  - Only 6.2% of hotel guests surveyed during the third quarter of 2009 stated that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meals, rental car, etc), which is consistent with the same quarter last year (6.2%) and an increase of 1.6 percentage points compared to last quarter.

Visitor Expenditures

- **During 3Q2009, the average per party expenditure in Palm Beach County was $1,047, $234 (18.3%) less than the average per party expenditure in the same quarter last year ($1,281) and $281 (21.2%) less than last quarter ($1,328).**
  - The spending categories that experienced the largest decreases compared to 3Q2008 were: ‘Gifts/Shopping’ (from $161 to $101, a 37.3 percentage point decrease), and ‘Lodging’ (from $602 to $440, a 26.9 percentage point decrease).
  - ‘Entertainment/Recreation’ was the only spending category to increase compared to the same quarter last year (from $39 to $50, a 28.2% percentage point increase).
  - During 3Q2009, the average per person expenditure was $499, a significant decrease compared with 3Q2008 ($610) and 2Q2009 ($664).

- **On average, surveyed guests coming to PBC for pleasure spent $1,346 per party in 3Q2009, while those traveling for business spent an average of $857.**
  - Leisure and business travelers’ per party expenditures both decreased significantly relative to the same quarter last year. Leisure travelers per party expenditures decreased by 15.4 percentage points (from $1,591 to $1,346), while business travelers per party expenditures decreased by 22.7 percentage points (from $1,109 to $857).
  - Relative to last quarter, leisure travelers’ per party spending decreased by 16.0 percentage points, (from $1,603 to $1,346) and business travelers’ per party spending decreased by 23.3 percentage points (from $1,117 to $857).

Hotel Visitor Survey: 3rd Quarter 2009

Characteristics of Visitors

- Most PBC visitors continued to categorize themselves as "White/Caucasian" (89.2%) in 3Q2009, consistent with previous quarters.
- In 3Q2009, most surveyed visitors to PBC fell between the ages of 35 and 54 (57.3%). The percentage of visitors 55 or older (25.9%) decreased compared to last year (28.0%) and last quarter (31.3%).
- Consistent with prior quarters, most PBC visitors surveyed in 3Q2009 reported being occupied in professional/managerial occupations (61.7%).
- In 3Q2009, 62.0% of surveyed hotel guests reported an annual household income of $100,000 or more, a slight decrease from the prior year (65.4%) and prior quarter (63.2%).
- In 3Q2009, PBC visitors continued to report that their traveling parties mainly consisted of adult family members/ friends (44.0%) or self only (34.3%); those traveling for pleasure typically traveled to PBC with adult family members/friends (80.2%), while business travelers traveled by themselves most often (50.2%).

Travel Details

- The vast majority (92.9%) of surveyed visitors cited Palm Beach County as the main destination for their trip, a slight increase compared to last year (90.9%) and a slight decrease compared to last quarter (95.2%).
- Nearly one-quarter of surveyed hotel guests were first time visitors to PBC in 3Q2009 (22.8%), a decrease compared to last year (24.8%) and last quarter (27.6%).
- The percentage of guests who traveled by airplane to Palm Beach County in 3Q2009 (62.4%) was lower than any quarter in the past year (3Q2008 – 69.1%; 4Q2008 – 77.2%; 1Q2009 – 74.9%; 2Q2009 – 70.1%), while the percentage of guests traveling by car (40.0%) was higher than any quarter in the past year (3Q2008 – 35.6%; 4Q2008 – 28.6%; 1Q2009 – 31.0%; 2Q2009 – 33.3%).
- Domestic travelers continued to comprise the vast majority of PBC visitors in 2Q2009 (93.4%), an increase compared with last year (87.5%) and last quarter (89.7%).

Attitudes toward Palm Beach County

- At 24.2%, 'Climate/Weather' continued to have been cited by surveyed hotel visitors during 3Q2009 as the aspect they liked the best about PBC.
- 'Humidity/Poor Weather' (27.4%) and 'Traffic/Bad Drivers' (21.3%) were the most prevalent dislikes about Palm Beach County in 3Q2009. The percentage of hotel guests mentioning 'Traffic/Bad Drivers' as the aspect of PBC they liked the least increased throughout the quarter (July, 12.1% to August, 22.6% to September, 33.0%).

Activity Participation

- In 3Q2009, dining in area restaurants continued being the most frequently mentioned activity in which PBC visitors participated (95.1%). Shopping (32.5%), going to the beach (32.4%), and swimming (29.0%) were other popular activities guests enjoyed during visitors' stay in PBC.
  - Compared to the same quarter last year, the activities that had the greatest increase in participation were: going to bars/nightclubs (from 8.6% to 15.2%), swimming (from 22.6% to 29.0%), and visiting downtown West Palm Beach attractions/City Place (from 9.0% to 14.6%).
- Going to the beach (12.0%) and golfing (7.7%) were the two most frequently mentioned activities that surveyed visitors did on a recent trip that they wished they could do in PBC.

Hotel Visitor Survey: 3rd Quarter 2009

Return Visits

- **Ninety-percent of hotel guests surveyed in 3Q2009 stated that they plan to return to PBC in the future, higher than any quarter in the past year (3Q2008 – 85.4%; 4Q2008 – 82.1%; 1Q2009 – 84.4%; 2Q2009 – 89.4%). Only 1.5% claimed they will not return, and the remainder (8.5%) were not sure if they will come back to PBC in the future or not.**
  - Three-quarters of those who plan to visit Palm Beach County again plan on returning in the next year (76.4%), an increase compared to last year (70.0%) and last quarter (65.8%).
  - Furthermore, in 3Q2009, the percentage of surveyed visitors who stated they plan on returning to PBC within the next three months (38.7%) was higher than any previous quarter in the past year (3Q2008 – 35.1%; 4Q2008 – 34.3%; 1Q2009 – 34.0%; 2Q2009 – 33.6%).
  - Among those who do not plan to return to PBC, the top reason cited in 3Q2009 was no interest (35.1%).

Vacation/Leisure Visitors

- While most leisure visitors surveyed in 3Q2009 reported that their last vacation destination was within the U.S. (76.3%), the percent reporting that their last vacation was domestic declined each month within 3Q2009 (79.2% in July, 77.7% in August, 72.8% in September). Locations in Florida (33.0%) and the Far West (13.1%) were the top domestic destinations mentioned.
- Nearly one-quarter of participating leisure hotel guests vacationed in a country abroad on their last trip (23.7%); countries in Latin America/Caribbean (13.6%) and Europe (7.9%) were visited most often.
- Nearly three-quarters of responding leisure visitors considered other domestic destinations when planning their vacation (72.4%). Nearly every domestic location considered was in Florida (69.2%).
- Throughout 3Q2009, PBC was typically seen as comparable to other recent vacation destinations. Responding leisure visitors claimed that PBC was about the same or better than their most recent vacation destination in terms of the following:
  - Being a good value (91.9%)
  - Being appreciated as a tourist or visitor (91.0%)
  - Being great for museums and other cultural activities (88.5%)
  - Being a great place to go again and again (88.0%)
  - Being able to always find a new place to see or a new thing to do (82.6%)
  - Being great for discovering nature-based activities/ecotourism (82.5%)
  - Being great for historical sights and places (80.4%)

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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: 3rd Quarter 2009

	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Occupancy Rate								
Month/Quarter	51.9%	53.7%	55.2%	45.3%	53.6%	57.8%	69.2%	58.0%
FYTD (Oct. - Sept.)	59.1%	60.9%	60.4%	59.1%	65.2%	57.8%	63.5%	61.7%
Room Nights Occupied[1*]								
Month/Quarter	708,976	249,580	255,988	203,408	727,536	783,412	923,953	789,895
FYTD (Oct. - Sept.)	3,206,236	2,746,840	2,219,416	3,206,236	3,499,289	783,412	1,707,365	2,497,260
Percentage of Room Nights Occupied								
Leisure	43.9%	43.8%	43.1%	45.6%	36.6%	38.3%	42.3%	41.5%
Business	30.5%	31.1%	27.5%	34.2%	36.9%	34.4%	32.9%	32.8%
Convention/Group	25.6%	25.1%	29.3%	20.2%	26.5%	27.4%	24.8%	25.7%
Average Daily Room Rate [2]	$98.63	$100.70	$95.03	$101.80	$121.39	$150.60	$188.55	$131.70

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 2009

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	**01/02**	**02/03**	**03/04**	**04/05**	**05/06**	**06/07**	**07/08**	**08/09**
3rd Quarter (July/Aug/Sept)	57.3	57.8	64.2	63.0	56.9	56.0	53.6	51.9
July	60.0	60.8	66.9	64.6	62.1	59.8	60.3	53.7
August	59.7	60.5	63.7	62.0	57.0	58.4	54.6	55.2
September	52.0	51.9	61.5	62.9	51.2	49.9	46.2	45.3
4th Quarter (Oct/Nov/Dec)	57.5	59.8	64.2	79.8	73.1	64.6	62.9	57.8
1st Quarter (Jan/Feb/Mar)	76.2	77.9	83.8	88.3	84.7	80.8	78.9	69.2
2nd Quarter (April/May/June)	65.1	67.0	71.8	72.7	71.0	68.5	65.5	58.0
Fiscal YTD (Oct. – Sept.)	**64.1**	**65.7**	**70.9**	**76.0**	**71.2**	**67.4**	**69.0**	**59.1**
Number of Room Nights Occupied in 3rd Quarter*							727,536	708,976

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

Property Manager Survey: 3rd Quarter 2009

	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 3Q 2009
Conference/Convention Bookings								
All Hotels								
% Occupied Room Nights in County	25.6%	25.1%	29.3%	20.2%	26.5%	27.4%	26.6%	25.7%
Occupied Room Nights in County	178,885	62,711	75,101	41,073	192,286	214,588	229,687	203,031
Occupied Room Nights in County FYTD (Oct.- Sept.)	826,191	710,017	785,118	826,191	1,017,002	214,588	444,275	647,306
Convention Hotels								
% Occupied Room Nights	30.0%	30.6%	34.9%	22.0%	30.3%	29.1%	26.6%	28.9%
Occupied Room Nights	128,929	46,996	54,221	27,712	131,933	137,795	143,304	141,270
Occupied Room Nights FYTD (Oct.- Sept.)	551,298	469,365	523,586	551,298	667,089	137,795	261,099	422,369
Available Inventory*								
Rooms in County	44,910	14,994**	14,953**	14,963**	44,130	44,145	44,575	44,972
Room Nights	1,377,247	464,814	463,543	448,890	1,353,315	1,353,780	1,336,822	1,364,154
Room Nights FYTD (Oct.- Sept.)	5,432,003	4,519,570	4,983,113	5,432,003	5,373,706	1,353,780	2,690,602	4,054,756
Response Rate								
Month/Quarter (for all hotels in County)	43.5%	48.7%	43.6%	38.0%	63.6%	61.2%	59.3%	49.9%
FYTD (Oct.- Sept.)	53.5%	56.0%	54.9%	53.5%	62.1%	61.2%	60.2%	56.8%

* Properties well below 50 rooms are only included in room count and total inventory.
** Number of rooms used for research purposes/data projections; actual total number of rooms available in Palm Beach County is 17,051.

Property Manager Survey: 3rd Quarter 2009

Occupancy Rate	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Size of Hotel								
50 - 100 Rooms	36.4%	36.4%	36.6%	36.1%	40.9%	51.1%	64.8%	48.8%
101 + Rooms	55.0%	57.0%	58.9%	47.2%	56.0%	59.1%	70.1%	59.8%
101-219	52.3%	53.0%	56.8%	45.8%	53.3%	57.6%	69.9%	58.0%
220-500	63.9%	66.8%	67.5%	53.7%	60.3%	62.0%	76.1%	67.0%
All Properties	51.9%	53.7%	55.2%	45.3%	53.6%	57.8%	69.2%	58.0%
Geographic Region								
North	54.9%	55.7%	57.5%	45.5%	53.9%	51.4%	66.9%	60.5%
Central	52.4%	53.8%	56.1%	47.3%	53.5%	61.2%	75.0%	59.7%
South	50.8%	53.0%	53.9%	44.1%	53.6%	57.4%	64.8%	55.4%

What percent of your occupancy is international?	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Size of Hotel								
50-100 Rooms	15.9%	23.4%	8.9%	16.2%	19.4%	5.1%	4.0%	16.8%
101 + Rooms	5.7%	5.4%	6.8%	4.8%	6.2%	5.4%	5.5%	5.2%
101-219	6.8%	6.1%	7.4%	6.7%	7.4%	5.0%	5.8%	5.4%
220-500	3.4%	3.1%	4.8%	1.5%	5.4%	5.7%	5.4%	4.1%
All Properties	7.0%	7.2%	7.2%	6.7%	8.0%	5.4%	5.5%	7.0%
Geographic Region								
North	2.1%	2.2%	1.9%	3.0%	4.6%	3.3%	4.0%	4.7%
Central	7.5%	9.0%	9.1%	4.2%	6.5%	6.4%	6.2%	7.0%
South	7.9%	7.5%	7.5%	10.0%	12.0%	4.7%	5.1%	7.9%

* Caution: Extremely Low base

Property Manager Survey: 3rd Quarter 2009

Average Daily Room Rate	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Size of Hotel								
50 - 100 Rooms*	$91.89	$88.13	$94.07	$93.29	$112.09	$142.22	$188.13	$107.10^
101 + Rooms	$99.90	$102.74	$95.48	$103.49	$123.30	$152.88	$189.30	$136.19
101-219	$70.89	$71.58	$69.02	$72.78	$92.83	$107.49	$137.27	$104.20
220-500	$112.07	$112.51	$104.41	$123.69	$143.28	$156.92	$183.66	$133.79
All Properties**	$98.63	$100.70	$95.03	$101.80	$121.39	$150.60	$188.55	$131.70

* Please note that the response rate for hotels with 50-100 rooms was low in April (25.8%), May (23.4%) and June (25.3%).
** "All properties" includes those with fewer than 50 rooms.
^ In 2Q2009, fewer hotels replied which were more upscale with higher rates (i.e. Chesterfield, Colony and Brazilian Court Hotels in Palm Beach) when compared to other quarters. This may be a contributing factor to a lower ADR.

Property Manager Survey: 3rd Quarter 2009

Occupied Room Nights *	Occupied Room Nights	% Change
3Q		
2007	763,604	
2008	727,536	- 4.7
2009	708,976	- 2.6
July		
2007	274,325	
2008	274,830	0.2
2009	249,580	- 9.2
August		
2007	267,903	
2008	248,869	- 7.1
2009	255,988	2.9
September		
2007	221,376	
2008	203,837	- 7.9
2009	203,408	- 0.2
4Q		
2007	844,910	
2008	783,412	- 7.3
2009	N/A	
1Q		
2007	1,070,734	
2008	1,050,605	- 1.9
2009	923,953	- 12.1
2Q		
2007	935,524	
2008	876,238	- 6.3
2009	789,895	- 9.9
FYTD (October – June)		
2007	3,628,164	
2008	3,499,289	- 3.6
2009	3,206,236	- 8.4

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

Property Manager Survey: 3rd Quarter 2009

Future Business Outlook (for each month as compared to the same month in previous year)	Total Room Revenue	Group/Indiv. Business Room Revenue	Individual Vacation Room Revenue
August 2009/September 2009 predictions from July			
Foresee Decrease	75.4%	80.2%	75.1%
Average decrease (among those who foresee decrease)	22.2%	21.0%	24.0%
Foresee No Change	12.9%	17.7%	15.5%
Foresee Increase	11.7%	2.1%	9.3%
Average increase (among those who foresee increase)	13.6%	5.0%	14.2%
September 2009/October 2009 predictions from August			
Foresee Decrease	83.2%	82.7%	76.7%
Average decrease (among those who foresee decrease)	22.0%	23.7%	22.9%
Foresee No Change	4.4%	4.4%	7.4%
Foresee Increase	12.4%	12.9%	15.9%
Average increase (among those who foresee increase)	25.6%**	26.5%**	8.9%
October 2009/November 2009 predictions from September			
Foresee Decrease	88.9%	83.4%	90.6%
Average decrease (among those who foresee decrease)	18.7%	19.6%	17.1%
Foresee No Change	11.1%	16.6%	6.0%
Foresee Increase	0.0%	0.0%	3.3%
Average increase (among those who foresee increase)	*	*	3.6%
Third Quarter predictions from July, August, and September			
Foresee Decrease	82.3%	82.3%	79.8%
Average decrease (among those who foresee decrease)	21.0%	21.4%	21.4%
Foresee No Change	8.8%	12.3%	10.1%
Foresee Increase	9.0%	5.5%	10.1%
Average increase (among those who foresee increase)	19.9%**	23.4%**	9.9%

**Caution: Extremely low base

* Indicates no property managers expected an increase in room revenue.

Property Manager Survey: 3rd Quarter 2009

Future Business Outlook (for each month as compared to the same month in previous year)	Total Room Revenue	Group/Indiv. Business Room Revenue	Individual Vacation Room Revenue
October 2009/November 2009 predictions from July			
Foresee Decrease	72.8%	78.1%	73.0%
Average decrease (among those who foresee decrease)	22.4%	21.9%	24.7%
Foresee No Change	16.9%	15.5%	17.6%
Foresee Increase	10.3%	6.4%	9.3%
Average increase (among those who foresee increase)	15.1%	15.1%	9.9%
November 2009/December 2009 predictions from August			
Foresee Decrease	82.7%	69.6%	69.4%
Average decrease (among those who foresee decrease)	19.1%	22.3%	22.1%
Foresee No Change	14.2%	18.1%	21.3%
Foresee Increase	3.1%	12.3%	9.3%
Average increase (among those who foresee increase)	5.0%	12.4%	7.3%
December 2009/January 2010 predictions from September			
Foresee Decrease	87.6%	80.5%	84.8%
Average decrease (among those who foresee decrease)	18.1%	20.6%	18.2%
Foresee No Change	6.3%	17.9%	6.0%
Foresee Increase	6.1%	1.7%	9.2%
Average increase (among those who foresee increase)	5.0%	8.8%	7.0%
Third Quarter predictions from July, August, and September			
Foresee Decrease	79.5%	75.3%	74.5%
Average decrease (among those who foresee decrease)	20.0%	21.7%	21.8%
Foresee No Change	13.5%	17.3%	15.8%
Foresee Increase	7.0%	7.4%	9.7%
Average increase (among those who foresee increase)	10.7%	13.0%	8.1%

Property Manager Survey: 3rd Quarter 2009

Bookings via third party website	Total 3Q 2009	July.	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Size of Hotel								
50 - 100 Rooms	10.3%	9.8%	8.3%	12.4%	29.0%	19.1%	11.9%	18.9%
101 + Rooms	15.3%	13.5%	15.9%	19.7%	13.6%	13.7%	14.5%	15.9%
101-219	15.1%	12.6%	11.5%	20.1%	14.0%	13.7%	14.6%	16.2%
220-500	17.4%	20.6%	13.0%	18.0%	13.6%	16.2%	17.2%	17.1%
All Properties*	15.2%	14.6%	12.9%	16.9%	18.4%	15.9%	15.1%	18.4%

* "All properties" includes those with fewer than 50 rooms.

Property Manager Survey: 3rd Quarter 2009

	Total 3Q 2009	July	Aug.	Sept	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
MARKET FOCUS (in terms of marketing, advertising and promotion)								
Florida Leisure Drive Market	87.7%	81.8%	96.2%	85.7%	70.0%	78.8%	77.0%	73.9%
Florida Business Drive Market	67.9%	71.9%	59.3%	76.2%	56.2%	63.2%	62.6%	63.1%
Florida Association Market	77.8%	69.7%	74.1%	95.2%	63.3%	52.9%	54.3%	51.6%
Weddings	72.8%	62.5%	73.1%	81.8%	57.4%	60.8%	63.2%	61.2%
Amateur Sports Events	72.8%	72.7%	63.0%	81.8%	59.9%	54.8%	68.2%	66.0%
Convention - Northeast	28.4%	28.1%	23.1%	36.4%	26.9%	27.8%	32.3%	23.1%
Convention - Mid-Atlantic	24.7%	21.2%	23.1%	27.3%	21.4%	25.9%	30.1%	18.8%
Convention - South	34.6%	27.3%	34.6%	43.5%	28.0%	29.4%	34.3%	21.2%
Convention - Midwest	22.2%	15.6%	23.1%	22.7%	20.8%	18.8%	22.0%	13.8%
Other**	28.0%	25.0%	28.0%	27.3%	20.3%	18.9%	13.7%	19.2%

** OTA's – Arts/Culture events, Kosher events, Corporate travel, Small groups/meetings (three mentions each), Local travel, Winter Season events, Entertainment (one mention each)

Property Manager Survey: 3rd Quarter 2009

Greatest challenges for 2009*	Total
Economy/Rates Net	**25**
Maintaining rates/ADR	12
Economy	10
Finishing the year at budget	2
Room revenue	1
Market Rate	1
Miscellaneous Net	**25**
Competitors/Over supply of hotel rooms	7
Maintaining occupancy/Heads in beds	6
More group business	5
Finding top corporate accounts again	2
Group cancellations	1
The AIG effect from a group perspective	1
The blighted condition our area has fallen into	1
H1N1 virus concerns	1
Demand	1
Advertising/Community awareness of new hotel brand	1
No convention center hotel	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 Visitor Survey: 3rd Quarter 2009

Characteristics of Stay	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Average Party Size *	2.1	2.2	2.3	1.9	2.1	1.9	1.9	2.0
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	2.9	3.0	2.9	3.0	3.7	3.8	4.8	3.7
Nights in Hotel	2.8	2.9	2.7	3.0	3.5	3.7	3.9	3.6
Rooms per Night *	1.3	1.3	1.3	1.2	1.3	1.2	1.2	1.2

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

Hotel Visitor Survey: 3rd Quarter 2009

Visitor Expenditures+	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Average Expenditure Per Visit								
Lodging	$440	$516	$416	$420	$602	$725	$1,034	$652
Restaurant/Bar	$330	$386	$305	$321	$336	$352	$402	$407
Gifts/Shopping	$101	$113	$95	$102	$161	$152	$82	$115
Entertainment/ Recreation	$50	$55	$57	$39	$39	$44	$74	$22
Local Travel	$126	$133	$135	$117	$144	$133	$172	$133
Total Per Party*	$1,047	$1,204	$1,007	$999	$1,281	$1,406	$1,763	$1,328
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$499	$547	$438	$526	$610	$740	$928	$664
Total Per Person/ Per Day	$178	$189	$162	$175	$174	$200	$238	$185
Lodging	$75	$81	$67	$74	$82	$103	$139	$91
Restaurant/Bar	$56	$60	$49	$56	$46	$50	$54	$57
Gifts/Shopping	$17	$18	$15	$18	$22	$22	$11	$16
Entertainment/ Recreation	$9	$9	$9	$7	$5	$6	$10	$3
Local Travel	$21	$21	$22	$21	$20	$19	$23	$19

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

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

Hotel Visitor Survey: 3rd Quarter 2009

Visitor Expenditures+	Pleasure							
	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Average Expenditure Per Visit								
Lodging	$541	$764	$417	$511	$655	$708	$1,254	$754
Restaurant/Bar	$408	$382	$364	$455	$402	$396	$505	$422
Gifts/Shopping	$153	$160	$112	$196	$316	$280	$172	$226
Entertainment/ Recreation	$88	$63	$106	$74	$62	$96	$172	$29
Local Travel	$156	$172	$143	$165	$156	$164	$172	$172
Total Per Party*	$1,346	$1,541	$1,142	$1,400	$1,591	$1,644	$2,274	$1,603
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$518	$571	$408	$636	$612	$685	$989	$641
Total Per Person/ Per Day	$152	$136	$146	$182	$157	$171	$202	$156
Lodging	$61	$67	$53	$66	$65	$74	$111	$74
Restaurant/Bar	$46	$34	$46	$59	$40	$41	$45	$41
Gifts/Shopping	$17	$14	$14	$25	$31	$29	$15	$22
Entertainment/ Recreation	$10	$6	$14	$10	$6	$10	$15	$3
Local Travel	$18	$15	$18	$21	$15	$17	$15	$17

* Starting in January 2002, if ‘party size’ is greater than 8 or if ‘number of rooms occupied’ is greater than 3, then data within ‘party size’ and ‘number of rooms occupied’ is excluded from analysis, reflective of meetings/conferences rather than individual travel parties.
+ Results may not be directly comparable to prior year due to availability of specific hotels at which interviewing was conducted.

Hotel Visitor Survey: 3rd Quarter 2009

Visitor Expenditures+	Business							
	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Average Expenditure Per Visit								
Lodging	$372	$385	$395	$338	$584	$728	$849	$573
Restaurant/Bar	$281	$354	$243	$223	$300	$329	$316	$387
Gifts/Shopping	$72	$90	$78	$43	$59	$84	$31	$38
Entertainment/ Recreation	$29	$48	$10	$18	$26	$18	$16	$16
Local Travel	$103	$108	$125	$80	$139	$116	$161	$102
Total Per Party*	$857	$986	$850	$700	$1,109	$1,274	$1,373	$1,117
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	$504	$580	$500	$438	$652	$849	$916	$698
Total Per Person/ Per Day	$210	$264	$200	$175	$198	$243	$295	$218
Lodging	$91	$103	$93	$84	$104	$139	$183	$112
Restaurant/Bar	$69	$95	$57	$56	$54	$63	$68	$76
Gifts/Shopping	$18	$24	$18	$11	$11	$16	$7	$8
Entertainment/ Recreation	$7	$13	$2	$4	$5	$3	$3	$3
Local Travel	$25	$29	$29	$20	$25	$22	$35	$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 Visitor Survey: 3rd Quarter 2009

Planning the Trip to Palm Beach County	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Reason for Trip								
Conference/Convention/ Business Meeting	54.3%	59.1%	50.4%	53.0%	55.9%	60.2%	52.7%	54.1%
- Business Meeting	44.1%	47.8%	40.8%	43.5%	47.6%	50.8%	47.4%	42.2%
- Conference/Convention	9.4%	9.0%	9.6%	9.4%	8.4%	9.2%	5.1%	11.9%
- Other Business	0.8%	2.3%	0.0%	0.0%	0.0%	0.1%	0.3%	0.0%
Vacation/Pleasure	33.6%	29.1%	32.1%	39.6%	35.9%	33.6%	38.7%	38.2%
Sporting Event	3.5%	5.6%	3.8%	1.2%	1.7%	3.1%	4.3%	1.8%
Cultural Event/Attraction	0.7%	0.3%	1.9%	0.0%	0.3%	0.4%	1.4%	0.3%
Film/TV location scouting/production	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.2%
Other	6.5%	4.1%	11.8%	3.6%	6.1%	2.7%	2.7%	4.5%
Who Made the Decision*								
Head of Household/ Other adult	50.0%	47.7%	58.4%	43.9%	40.5%	38.1%	44.8%	39.9%
Employer	43.3%	46.5%	36.4%	47.2%	52.1%	57.2%	50.4%	52.2%
Family Living in PBC	8.6%	7.8%	9.7%	8.4%	6.7%	5.9%	5.4%	10.3%
Children Influenced Decision	2.3%	3.0%	2.2%	2.0%	1.4%	0.4%	1.1%	0.8%
Advanced Planning								
One Month or Less	64.0%	63.6%	59.3%	69.1%	67.2%	56.3%	54.3%	58.8%
2 to 3 Months	19.8%	17.8%	23.4%	18.2%	15.2%	21.0%	20.7%	20.3%
More than 3 Months	16.2%	18.6%	17.3%	12.8%	17.6%	22.7%	25.1%	20.9%

* Multiple responses accepted.

Hotel Visitor Survey: 3rd Quarter 2009

Planning the Trip to Palm Beach County (Continued)	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	50.7%	55.7%	46.6%	49.6%	55.1%	58.7%	50.6%	52.2%
Visit Friends/Relatives	23.0%	20.7%	20.5%	27.3%	18.8%	20.3%	26.1%	20.3%
Previous Visit	13.8%	13.4%	8.4%	19.6%	14.0%	10.6%	19.1%	19.3%
Special Event	9.0%	6.8%	13.4%	6.8%	5.1%	6.8%	5.7%	5.8%
Beaches	8.6%	8.6%	8.3%	9.6%	6.5%	4.3%	5.7%	9.7%
Weather	7.3%	8.2%	6.1%	7.9%	4.6%	4.8%	8.6%	10.4%
Golf/Tennis/Recreation	3.7%	3.4%	3.6%	4.4%	1.7%	2.8%	3.1%	1.7%
Convenient Flights	3.4%	5.1%	1.8%	3.3%	4.5%	4.5%	5.0%	6.5%
Friends/Relatives recommendation	2.8%	4.2%	1.2%	3.0%	3.0%	2.0%	2.8%	3.0%
Compete in Sporting Event	2.1%	3.2%	2.6%	0.8%	1.0%	1.5%	0.8%	0.6%
Hotel Brochure/Website	1.8%	1.7%	2.4%	1.2%	1.6%	1.3%	1.9%	1.8%
Attend Sporting Event	1.5%	1.8%	1.4%	1.4%	0.3%	1.2%	3.3%	1.4%
Art/Cultural Event	1.3%	0.4%	3.2%	0.4%	0.4%	0.2%	0.7%	0.3%
Attraction Brochure/Website	1.0%	2.5%	0.0%	0.6%	0.6%	0.3%	1.1%	0.6%
Other Internet Sources	0.7%	0.8%	1.1%	0.0%	0.6%	0.2%	0.3%	0.8%
Bus Tour	0.6%	0.0%	0.5%	1.0%	0.0%	0.1%	0.1%	0.0%
PBC-CVB Information/ Website	0.4%	0.8%	0.4%	0.0%	0.4%	0.5%	0.1%	0.6%
Travel Agency	0.1%	0.0%	0.0%	0.4%	0.1%	0.0%	0.3%	0.0%
Spring Training	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.1%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Media Coverage	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
State Tourist Agency	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Other	6.6%	5.2%	8.1%	6.7%	6.0%	4.4%	3.1%	2.7%

* Multiple responses accepted.

Hotel Visitor Survey: 3rd Quarter 2009

Booking Tools	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Booked Trip with Travel Agency								
Yes	20.9%	22.1%	21.3%	20.0%	23.4%	25.7%	23.2%	24.4%
No	79.1%	77.9%	78.7%	80.0%	76.6%	74.3%	76.8%	75.6%
Booked Any Part of Trip Using Internet								
Yes	54.6%	53.8%	52.0%	58.1%	47.4%	46.0%	48.9%	54.9%
No	45.4%	46.2%	48.0%	41.9%	52.6%	54.0%	51.1%	45.1%
Booked Any Part of Trip Using Internet* **(among those who used the Internet)**								
Hotel	83.7%	80.2%	86.3%	84.0%	82.7%	81.0%	76.7%	81.3%
Hotel website	43.8%	42.7%	46.8%	41.1%	38.0%	41.2%	30.1%	36.2%
Expedia	5.8%	6.9%	4.3%	6.6%	7.7%	5.3%	7.7%	5.6%
Travelocity	4.8%	6.9%	4.8%	2.9%	6.4%	4.1%	4.8%	3.6%
Hotwire	2.8%	3.7%	2.2%	2.2%	3.9%	3.4%	2.1%	3.9%
Hotels.com	2.1%	2.4%	3.3%	0.7%	2.7%	3.1%	1.6%	1.7%
Orbitz	2.0%	0.0%	4.3%	1.7%	1.7%	3.0%	1.7%	2.3%
PBC CVB Website	0.3%	0.0%	0.0%	1.0%	0.0%	0.3%	0.0%	0.0%
Other Website	9.4%	6.8%	8.2%	12.9%	7.5%	6.6%	7.0%	12.2%
Don’t Remember	14.6%	12.8%	13.1%	17.1%	17.7%	18.2%	22.7%	18.8%
Air	48.7%	59.1%	40.1%	46.8%	61.3%	66.0%	68.8%	60.4%
Car Rental	29.3%	42.8%	24.8%	22.1%	37.7%	31.3%	36.6%	29.7%
Tickets to Event	0.2%	0.0%	0.6%	0.0%	0.0%	0.3%	0.6%	0.0%
Other	2.8%	4.0%	1.5%	3.0%	3.9%	4.3%	6.2%	6.5%
Visit was Part of Package **(that may have included airfare,lodging,meals,rental car, etc.)**								
Yes	6.2%	9.3%	3.9%	6.2%	6.2%	5.1%	5.2%	4.6%
No	93.8%	90.7%	96.1%	93.8%	93.8%	94.9%	94.8%	95.4%

* Multiple responses accepted.

Hotel Visitor Survey: 3rd Quarter 2009

Activity Participation	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Participation in Specific Activities*								
Restaurants	95.1%	95.8%	94.8%	94.8%	94.7%	95.6%	95.6%	97.9%
Shopping	32.5%	36.7%	32.7%	28.2%	32.2%	32.5%	31.1%	30.9%
Went to Beach	32.4%	34.0%	33.9%	30.5%	30.2%	26.3%	27.4%	30.2%
Swimming	29.0%	23.1%	34.6%	29.4%	22.6%	14.0%	12.6%	23.8%
Bars/Nightclubs	15.2%	19.0%	16.9%	9.5%	8.6%	8.6%	9.2%	10.6%
Visited downtown West Palm Beach Attractions/City Place	14.6%	15.4%	17.9%	10.7%	9.0%	10.5%	9.0%	6.7%
Visited Downtown Delray Beach Attractions	9.5%	11.4%	8.2%	9.6%	5.2%	8.0%	6.8%	9.3%
Golf, Tennis	9.3%	12.6%	7.3%	8.2%	7.3%	10.4%	12.4%	8.5%
Visited Mizner Park/Boca Raton	6.8%	8.8%	7.6%	3.8%	4.3%	5.9%	6.7%	8.5%
Visited Downtown at the Gardens	5.3%	9.2%	4.8%	2.2%	1.5%	2.1%	2.4%	2.3%
Attractions, Tours, Zoo	4.0%	4.2%	3.2%	4.8%	2.3%	1.9%	2.8%	2.5%
Boating	3.3%	2.6%	4.2%	2.7%	2.5%	1.3%	1.5%	2.0%
Visited Riviera Beach/Singer Island	3.3%	1.7%	3.2%	4.6%	1.0%	1.4%	0.7%	0.5%
Museums, Art Galleries	2.7%	2.6%	2.3%	2.8%	2.3%	5.0%	3.9%	3.5%
Fishing	2.5%	3.8%	1.7%	2.2%	1.1%	1.7%	1.7%	1.3%
Performing Arts (plays, concerts, dance)	2.2%	1.4%	3.3%	1.7%	1.3%	1.6%	2.8%	1.2%
Visited Palm Beach/Worth Avenue	2.0%	3.4%	0.4%	2.6%	1.0%	3.1%	3.0%	2.7%
Competed in Sports Event	1.8%	2.6%	3.0%	0.0%	0.3%	0.5%	0.4%	0.6%
Visited Wildlife Refuge	1.4%	2.0%	1.5%	0.4%	2.4%	3.3%	3.2%	2.3%
Attended a Sporting Event	1.4%	1.4%	1.9%	0.9%	1.9%	2.3%	3.3%	1.7%
Snorkeling	1.4%	1.7%	1.7%	0.7%	1.7%	0.7%	0.2%	0.8%
Gambling Cruise	0.9%	0.8%	0.4%	1.0%	0.7%	0.7%	0.2%	0.5%
Pari-mutuels (dog-track)	0.7%	0.4%	0.9%	0.9%	0.0%	0.6%	0.4%	0.4%
Visited downtown Lake Worth	0.6%	0.5%	0.9%	0.4%	1.3%	0.7%	1.5%	1.9%
Surfing	0.3%	0.8%	0.0%	0.0%	0.3%	0.7%	0.4%	0.0%
Palm Beach County Convention Center	0.3%	0.9%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Diving	0.3%	0.4%	0.0%	0.3%	0.7%	0.2%	0.1%	0.1%
Kite Surfing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%
Horse Related Activities	0.0%	0.0%	0.0%	0.0%	0.1%	0.6%	1.2%	0.0%
Other	4.4%	4.6%	6.6%	2.2%	10.4%	8.9%	7.2%	5.7%

*Multiple responses accepted.

Hotel Visitor Survey: 3rd Quarter 2009

Return Visits	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Plan to Return to PBC								
Yes	90.0%	88.5%	90.0%	91.5%	85.4%	82.1%	84.4%	89.4%
No	1.5%	1.2%	2.4%	1.0%	3.1%	3.2%	2.6%	2.8%
Don't know	8.5%	10.3%	7.6%	7.5%	11.5%	14.7%	13.0%	7.9%
If no, why not?* (Top mentions – 4% or higher)	n=11	n = 3**	n = 6**	n = 2**	n = 23	n = 24	n = 19	n =19
No interest	35.1%	1	2	1	0.0%	0.0%	0.0%	0.0%
Family is moving away	9.8%	0	1	0	0.0%	0.0%	0.0%	0.0%
Too expensive	9.6%	1	0	0	0.0%	0.0%	0.0%	0.0%
Going to other places/I like changing destinations	9.0%	0	1	1	0.0%	4.1%	9.7%	10.0%
Too hot	8.8%	0	1	0	0.0%	0.0%	0.0%	0.0%
No reason/No answer	27.7%	1	2	0	47.6%	37.2%	37.2%	26.8%
When do you plan on returning to PBC?								
Within the next 3 months	38.7%	37.0%	37.9%	41.6%	35.1%	34.3%	34.0%	33.6%
Within the next 6 months	16.5%	16.1%	15.3%	17.7%	13.9%	13.0%	8.3%	12.7%
Within the next year	21.2%	23.7%	21.5%	18.6%	21.0%	20.3%	26.9%	19.5%
Within the next few years	6.1%	5.0%	9.2%	3.8%	3.6%	5.0%	5.6%	6.4%
Don't Know	17.4%	18.3%	16.2%	18.4%	26.4%	27.4%	25.2%	27.8%

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

Hotel Visitor Survey: 3rd Quarter 2009

Travel Details	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Main Destination								
Palm Beach County	92.9%	89.0%	94.8%	94.6%	90.9%	90.2%	90.2%	95.2%
First Trip to PBC	22.8%	23.2%	21.1%	24.7%	24.8%	29.9%	22.2%	27.6%
Type of Transportation*								
Airplane	62.4%	68.6%	58.5%	61.4%	69.1%	77.2%	74.9%	70.1%
Car	40.0%	37.9%	41.4%	39.4%	35.6%	28.6%	31.0%	33.3%
Other	1.8%	0.4%	3.1%	0.9%	0.5%	0.2%	0.3%	0.6%

*Multiple responses accepted.

Hotel Visitor Survey: 3rd Quarter 2009

Attitudes about Trip to Palm Beach County	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Things Liked Best – Top Mentions								
Climate/Weather	24.2%	21.8%	22.4%	28.4%	26.6%	42.4%	46.4%	32.4%
Beaches/Ocean	16.7%	16.1%	19.3%	14.8%	17.0%	9.8%	8.2%	15.4%
Beautiful/Nice Area	7.3%	6.7%	8.1%	6.9%	9.3%	7.0%	7.7%	10.0%
Relaxing Atmosphere	7.2%	7.8%	7.3%	6.7%	4.7%	4.5%	4.4%	3.8%
Cleanliness	4.9%	5.2%	4.1%	5.2%	4.1%	4.2%	3.4%	4.8%
Nice People	3.9%	5.7%	3.0%	3.2%	6.6%	4.0%	3.5%	2.8%
Restaurant/Food	3.5%	4.9%	2.1%	3.3%	2.6%	2.9%	2.0%	3.0%
Visiting Family/Friends	3.3%	0.5%	5.6%	3.7%	3.3%	5.1%	4.8%	4.1%
Golf	2.9%	3.7%	2.8%	2.3%	1.7%	2.6%	1.4%	1.3%
Hotel	2.6%	3.1%	3.2%	1.7%	3.5%	1.7%	1.7%	1.7%
Everything	2.0%	1.3%	2.6%	1.7%	2.4%	1.2%	1.1%	3.0%
Palm Trees	2.0%	2.3%	2.1%	1.7%	1.8%	1.6%	0.3%	1.1%
Other	20.2%	20.8%	15.0%	20.2%	16.7%	13.5%	15.9%	16.7%

Hotel Visitor Survey: 3rd Quarter 2009

Attitudes about Trip to Palm Beach County	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Things Liked Least – Top Mentions								
Humidity/Poor Weather	27.4%	27.8%	36.4%	19.4%	30.1%	16.8%	11.7%	21.7%
Traffic/Bad Drivers	21.3%	12.1%	22.6%	33.0%	23.1%	31.6%	31.7%	22.4%
Expensive	4.5%	6.7%	1.9%	4.3%	4.4%	4.2%	5.8%	4.5%
Road Construction	3.0%	4.8%	0.6%	3.5%	1.1%	0.9%	0.3%	1.7%
Too crowded	2.3%	0.0%	0.8%	5.5%	2.4%	0.6%	4.8%	2.0%
Hotel (general)	2.0%	2.2%	2.7%	1.1%	1.1%	2.6%	4.2%	1.4%
Other	31.0%	31.0%	28.9%	24.8%	19.7%	24.6%	23.8%	23.1%
Nothing liked least	9.6%	14.6%	5.9%	8.0%	18.5%	18.5%	17.2%	22.9%

Hotel Visitor Survey: 3rd Quarter 2009

What one activity did you do on a recent trip that you wish you could do in Palm Beach County?	Total 3Q2009	July	Aug.	Sep.	Total 3Q2008	Total 4Q2008	Total 1Q2009	Total 2Q2009
(Top mentions – 2% or higher in total)								
Going to the beach	12.0%	10.3%	13.8%	11.5%	9.5%	23.6%	11.0%	12.8%
Golfing	7.7%	9.6%	3.7%	9.9%	16.4%	11.2%	17.7%	16.6%
Boating	6.3%	8.2%	4.0%	6.6%	4.0%	4.0%	2.6%	2.6%
Fishing/Deep sea fishing	6.1%	6.3%	2.1%	9.3%	6.3%	5.5%	4.1%	7.9%
Relaxing	3.9%	3.0%	5.4%	3.3%	5.0%	3.5%	0.6%	3.8%
Gambling	3.1%	3.4%	4.6%	1.4%	3.9%	2.9%	0.0%	2.2%
Snorkeling	2.7%	3.1%	2.4%	2.6%	3.6%	3.0%	5.2%	2.6%
Sightseeing/Visiting historical sights	2.3%	3.0%	1.1%	2.6%	3.4%	3.6%	4.0%	2.1%
Shopping	2.2%	3.8%	2.4%	0.0%	3.9%	4.2%	2.7%	1.8%
Other	34.6%	36.8%	33.0%	33.9%	41.4%	33.1%	43.8%	36.9%
Nothing	19.5%	12.6%	27.6%	18.5%	3.3%	5.4%	8.3%	10.7%

Hotel Visitor Survey: 3rd Quarter 2009

Last Vacation Destination+	Total 3Q2009	July	Aug.	Sept.	Total 3Q2008	Total 4Q2008	Total 1Q2009	Total 2Q2009
Domestic	**76.3%**	**79.2%**	**77.7%**	**72.8%**	**64.5%**	**59.7%**	**65.1%**	**61.8%**
Florida	33.0%	39.1%	26.1%	32.8%	25.6%	19.9%	26.8%	25.2%
Far West	13.1%	7.7%	19.7%	13.7%	10.2%	19.7%	14.8%	16.2%
Southeast (Excluding Florida)	10.5%	16.5%	16.7%	1.4%	12.5%	7.6%	7.5%	7.7%
New York	7.4%	8.3%	5.1%	7.0%	3.3%	2.2%	4.8%	4.3%
Midwest	6.1%	2.0%	4.3%	11.0%	4.4%	2.8%	2.7%	3.1%
Mid Atlantic	3.4%	3.6%	3.7%	2.7%	3.4%	2.1%	2.6%	2.9%
New England	2.8%	1.9%	2.1%	4.3%	5.1%	5.4%	5.8%	2.5%
International	**23.7%**	**20.8%**	**22.3%**	**27.2%**	**33.4%**	**40.3%**	**34.0%**	**35.9%**
Latin America/Caribbean	13.6%	8.6%	14.6%	16.%	16.6%	19.2%	14.4%	16.3%
Europe	7.9%	8.3%	7.7%	7.5%	12.2%	13.2%	14.0%	11.0%
England/UK	0.6%	0.0%	2.2%	0.0%	2.8%	1.0%	0.9%	0.0%
Germany	0.4%	0.0%	0.0%	1.2%	1.1%	0.0%	0.4%	0.0%
Australia/Asia	1.1%	0.0%	0.0%	3.0%	1.8%	3.1%	2.3%	3.0%
Canada	1.1%	3.8%	0.0%	0.0%	0.7%	3.3%	1.5%	2.9%
Africa	0.0%	0.0%	0.0%	0.0%	1.5%	0.5%	0.0%	3.0%
Middle East	0.0%	0.0%	0.0%	0.0%	0.7%	1.0%	1.8%	1.6%

+ Among vacation/leisure visitors only

Hotel Visitor Survey: 3rd Quarter 2009

Other Vacation Destinations Considered*+	Total 3Q2009	July	Aug.	Sept.	Total 3Q2008	Total 4Q2008	Total 1Q2009	Total 2Q2009
Domestic	**72.4%**	**70.6%**	**90.6%**	**59.4%**	**40.5%**	**52.3%**	**64.6%**	**69.7%**
Florida	69.2%	70.6%	84.4%	56.1%	37.4%	52.3%	59.6%	67.8%
New York	2.1%	0.0%	2.8%	3.3%	0.0%	0.0%	0.0%	1.1%
Far West	1.1%	0.0%	3.4%	0.0%	1.5%	0.0%	5.1%	1.7%
Southeast (Excluding Florida)	1.0%	0.0%	3.0%	0.0%	0.8%	0.0%	1.0%	3.4%
Mid Atlantic	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
Midwest	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New England	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
International	**1.0%**	**2.8%**	**0.0%**	**0.0%**	**1.7%**	**6.4%**	**1.9%**	**3.9%**
Latin America/Caribbean	1.0%	2.8%	0.0%	0.0%	0.8%	5.2%	1.9%	2.8%
Europe	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Germany	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
England/UK	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Canada	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Australia/Asia	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
Africa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Middle East	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
No other destinations	**25.6%**	**26.6%**	**6.3%**	**40.6%**	**57.8%**	**41.3%**	**35.4%**	**25.3%**

* Multiple responses accepted
+ Among vacation/leisure visitors only

Hotel Visitor Survey: 3rd Quarter 2009

Comparison of Palm Beach County to Last Vacation+	Total 3Q2009	July 2009	Aug. 2009	Sept. 2009
Being a great place to go again and again				
Palm Beach County is much better	30.7%	39.5%	29.9%	23.0%
Palm Beach County is about the same	57.3%	47.6%	61.3%	63.5%
Palm Beach County is much worse	12.0%	13.0%	8.8%	13.5%
Being able to always find a new place to see or a new thing to do				
Palm Beach County is much better	25.9%	29.4%	20.1%	29.4%
Palm Beach County is about the same	56.7%	51.9%	66.7%	50.9%
Palm Beach County is much worse	17.4%	18.6%	13.2%	19.7%
Being appreciated as a tourist or visitor				
Palm Beach County is much better	33.5%	48.1%	26.3%	29.8%
Palm Beach County is about the same	57.5%	51.9%	61.6%	55.3%
Palm Beach County is much worse	9.0%	0.0%	12.1%	14.9%
Being a good value				
Palm Beach County is much better	29.5%	27.2%	28.4%	34.5%
Palm Beach County is about the same	62.4%	66.7%	61.9%	56.9%
Palm Beach County is much worse	8.1%	6.1%	9.7%	8.7%
Being great for historical sights and places				
Palm Beach County is much better	23.5%	19.5%	18.5%	33.1%
Palm Beach County is about the same	56.9%	68.4%	59.5%	43.8%
Palm Beach County is much worse	19.6%	12.1%	21.9%	23.1%
Being great for discovering nature-based activities/ecotourism				
Palm Beach County is much better	28.3%	32.5%	22.8%	32.0%
Palm Beach County is about the same	54.2%	57.7%	57.0%	45.0%
Palm Beach County is much worse	17.5%	9.7%	20.1%	22.5%
Being great for museums and other cultural activities				
Palm Beach County is much better	27.8%	33.7%	21.2%	31.0%
Palm Beach County is about the same	60.7%	60.3%	67.6%	51.4%
Palm Beach County is much worse	11.5%	5.9%	11.2%	17.7%

+ Among vacation/leisure visitors only

Hotel Visitor Survey: 3rd Quarter 2009

Characteristics of Visitors	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Age								
Under 35	16.8%	13.4%	15.5%	21.2%	19.0%	16.4%	13.0%	17.6%
35 to 54	57.3%	58.8%	58.0%	56.1%	53.0%	54.5%	48.4%	51.1%
55 to 64	21.0%	23.5%	21.4%	17.7%	19.7%	20.2%	25.0%	21.4%
65 +	4.9%	4.3%	5.1%	5.1%	8.3%	9.0%	13.6%	9.9%
Occupation								
Professional/Managerial	61.7%	66.2%	59.9%	59.9%	58.5%	64.3%	60.6%	59.0%
Sales	17.1%	14.7%	17.4%	18.9%	16.3%	14.3%	16.8%	14.7%
Retired	7.0%	7.1%	9.2%	7.4%	9.3%	10.3%	13.7%	12.1%
Technical	6.9%	6.0%	7.3%	4.5%	6.6%	6.4%	4.9%	7.3%
Student	2.6%	2.2%	2.1%	3.4%	1.2%	0.4%	1.1%	1.1%
Other	4.7%	3.8%	4.0%	6.0%	8.0%	4.2%	2.9%	6.1%
Hispanic Origin	7.4%	9.1%	10.9%	2.8%	7.1%	4.1%	4.0%	6.4%
Ethnicity								
White/Caucasian	89.2%	92.3%	88.1%	87.2%	89.0%	93.4%	93.9%	90.4%
African-American/Black	7.6%	5.0%	7.8%	10.0%	8.4%	3.6%	4.2%	6.3%
Asian	3.2%	2.7%	4.1%	2.8%	2.1%	2.7%	1.7%	2.5%
Other	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%	0.1%	0.7%

Hotel Visitor Survey: 3rd Quarter 2009

Characteristics of Visitors (Continued)	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Income								
Under $45,000	5.5%	0.9%	8.6%	6.3%	2.8%	2.2%	3.0%	4.8%
$45,000 to $64,999	10.8%	12.1%	13.5%	7.5%	7.8%	8.9%	6.1%	10.0%
$65,000 to $99,999	21.8%	15.2%	21.4%	27.7%	24.1%	20.6%	17.5%	22.0%
$100,000 to $200,000	44.9%	51.7%	40.8%	42.2%	45.4%	44.6%	44.6%	42.2%
Over $200,000	17.1%	20.2%	15.6%	16.3%	20.0%	23.6%	28.9%	21.0%
Gender								
Male	59.3%	61.7%	56.7%	59.8%	61.2%	61.0%	57.8%	57.6%
Female	40.7%	38.3%	43.3%	40.2%	38.8%	39.0%	42.2%	42.4%

Hotel Visitor Survey: 3rd Quarter 2009

Description of Travel Party*	Total Hotel Guests							
	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Adult family members or friends	44.0%	40.7%	48.7%	43.7%	40.7%	36.2%	42.0%	44.7%
Self Only	34.3%	27.3%	33.8%	40.5%	38.7%	45.1%	40.0%	39.0%
Business Associates	20.4%	29.7%	15.2%	16.2%	19.7%	17.9%	17.0%	16.6%
Children <12 years of age	9.1%	10.3%	9.6%	7.6%	7.9%	6.6%	5.4%	7.1%
Grandchildren <12 years of age	0.6%	1.6%	0.0%	0.0%	0.0%	0.3%	0.6%	0.6%

Description of Travel Party*	Pleasure Hotel Guests							
	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Adult family members or friends	80.2%	84.6%	83.0%	73.9%	81.5%	74.6%	79.5%	82.6%
Self Only	14.4%	7.4%	11.3%	23.3%	14.9%	20.2%	16.8%	14.5%
Children under 12 years of age	17.6%	23.4%	17.1%	12.9%	15.8%	15.9%	11.5%	13.3%
Business Associates	2.0%	2.4%	2.1%	1.9%	1.2%	1.2%	1.0%	2.4%
Grandchildren <12 years of age	1.4%	4.1%	0.0%	0.0%	0.0%	0.8%	1.4%	1.0%

Description of Travel Party*	Business Hotel Guests							
	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Self Only	50.2%	41.0%	54.9%	54.6%	54.7%	60.1%	59.7%	57.7%
Business Associates	33.4%	45.4%	27.4%	25.7%	32.0%	27.9%	30.0%	28.0%
Adult family members or friends	16.9%	13.4%	17.7%	21.2%	13.6%	13.0%	10.8%	15.2%
Children under 12 years of age	2.3%	1.5%	1.8%	3.7%	2.8%	1.2%	0.6%	2.4%
Grandchildren <12 years of age	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%

*Multiple responses accepted.

Hotel Visitor Survey: 3rd Quarter 2009

Place of Origin	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Domestic	**93.4% (n=697)**	**88.3% (n=220)**	**95.8% (n=236)**	**95.6% (n=238)**	**87.5% (n=645)**	**84.2% (n=618)**	**89.6% (n=660)**	**89.7% (n=661)**
Florida	32.8% (n=245)	26.5% (n=66)	34.8% (n=86)	36.1% (n=90)	25.0% (n=184)	17.6% (n=129)	18.1% (n=133)	26.8% (n=197)
Midwest	11.2% (n=84)	11.3% (n=28)	13.2% (n=33)	8.9% (n=22)	10.4% (n=77)	11.8% (n=87)	14.9% (n=110)	15.6% (n=115)
Mid Atlantic	10.0% (n=75)	8.7% (n=22)	9.5% (n=23)	12.2% (n=30)	11.9% (n=88)	12.9% (n=95)	16.5% (n=122)	13.2% (n=97)
Southeast (excluding Florida)	19.5% (n=145)	21.3% (n=53)	19.6% (n=48)	17.9% (n=44)	19.2% (n=142)	17.3% (n=127)	13.8% (n=102)	13.9% (n=102)
New York	8.1% (n=61)	6.4% (n=16)	8.0% (n=20)	10.3% (n=26)	9.2% (n=68)	9.2% (n=68)	12.3% (n=90)	8.1% (n=59)
New England	5.0% (n=38)	4.2% (n=10)	5.7% (n=14)	5.1% (n=13)	5.9% (n=44)	7.7% (n=56)	8.6% (n=63)	7.4% (n=54)
Far West	6.1% (n=45)	8.3% (n=21)	4.9% (n=12)	5.2% (n=13)	5.8% (n=43)	7.7% (n=56)	5.4% (n=40)	4.8% (n=35)
International	**6.6% (n=49)**	**11.7% (n=29)**	**4.2% (n=10)**	**4.4% (n=11)**	**12.5% (n=92)**	**15.8% (n=116)**	**10.4% (n=77)**	**10.3% (n=75)**
Europe (net)	2.1% (n=15)	4.1% (n=10)	0.8% (n=2)	1.3% (n=3)	5.8% (n=43)	6.7% (n=49)	4.4% (n=33)	4.8% (n=35)
- Germany	0.3% (n=2)	0.8% (n=2)	0.0% (n=0)	0.0% (n=0)	1.2% (n=9)	1.7% (n=13)	1.0% (n=8)	0.4% (n=3)
- England/UK	1.1% (n=8)	2.4% (n=6)	0.5% (n=1)	0.4% (n=1)	1.0% (n=8)	1.5% (n=11)	1.0% (n=8)	2.2% (n=16)
Canada	1.6% (n=12)	2.0% (n=5)	1.7% (n=4)	1.2% (n=3)	2.4% (n=18)	4.1% (n=30)	2.6% (n=19)	2.6% (n=19)
Latin America / Caribbean	2.2% (n=16)	4.4% (n=11)	0.5% (n=1)	1.5% (n=4)	3.0% (n=22)	3.1% (n=23)	2.6% (n=19)	2.4% (n=17)
Australia/Asia	0.4% (n=3)	0.4% (n=1)	0.5% (n=1)	0.4% (n=1)	0.3% (n=2)	1.0% (n=7)	0.7% (n=5)	0.5% (n=4)
Africa	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.4% (n=3)	0.4% (n=3)	0.1% (n=1)	0.0% (n=0)
Middle East	0.4% (n=3)	0.4% (n=1)	0.8% (n=2)	0.0% (n=0)	0.6% (n=4)	0.5% (n=4)	0.0% (n=0)	0.0% (n=0)

Hotel Visitor Survey: 3rd Quarter 2009

Pleasure Vs. Business By Selected Place of Origin	Total 3Q 2009	July	Aug.	Sept.	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009	Total 2Q 2009
Florida	**32.8%**	**26.5%**	**34.8%**	**36.1%**	**25.0%**	**17.6%**	**18.1%**	**26.8%**
Business	19.0%	16.8%	17.1%	22.5%	14.1%	11.4%	11.8%	16.7%
Pleasure	13.4%	9.2%	17.1%	13.3%	10.1%	6.1%	6.1%	9.8%
Southeast (excluding Florida)	**19.5%**	**21.3%**	**19.6%**	**17.9%**	**19.2%**	**17.3%**	**13.8%**	**13.9%**
Business	12.9%	15.2%	12.6%	10.8%	12.6%	13.4%	10.0%	9.2%
Pleasure	6.0%	5.6%	6.9%	5.6%	6.3%	3.7%	3.8%	4.6%
Midwest	**11.2%**	**11.3%**	**13.2%**	**12.2%**	**10.4%**	**11.8%**	**14.9%**	**15.6%**
Business	6.6%	6.4%	6.9%	4.0%	6.7%	6.7%	7.9%	9.5%
Pleasure	4.4%	4.8%	6.1%	8.0%	3.8%	5.2%	7.1%	6.3%
Mid Atlantic	**10.0%**	**8.7%**	**9.5%**	**10.3%**	**11.9%**	**12.9%**	**16.5%**	**13.2%**
Business	4.0%	4.4%	3.7%	3.6%	6.0%	7.4%	6.5%	6.0%
Pleasure	5.9%	4.0%	5.7%	6.0%	6.0%	5.4%	9.6%	7.2%
New York	**8.1%**	**6.4%**	**5.7%**	**5.2%**	**9.2%**	**9.2%**	**12.3%**	**8.1%**
Business	2.8%	2.0%	1.6%	3.2%	3.8%	4.4%	3.5%	3.1%
Pleasure	5.0%	4.0%	4.1%	2.0%	5.3%	4.8%	8.7%	4.8%
Far West	**6.1%**	**8.3%**	**8.0%**	**8.9%**	**5.8%**	**7.7%**	**5.4%**	**4.8%**
Business	3.8%	4.4%	2.8%	6.0%	4.3%	5.3%	4.1%	3.1%
Pleasure	2.3%	3.2%	5.3%	2.4%	13.6%	2.2%	1.2%	1.6%
New England	**5.0%**	**4.2%**	**4.9%**	**5.1%**	**5.9%**	**7.7%**	**8.6%**	**7.4%**
Business	1.9%	2.4%	3.3%	1.6%	2.6%	3.8%	3.7%	2.4%
Pleasure	3.1%	1.6%	1.6%	3.6%	3.1%	3.8%	4.9%	4.9%