



**Report on Palm Beach County Tourism  
Fourth Quarter 2006  
(October, November and December)**

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# Introduction: 4th Quarter 2006

## Background

- The following report contains information collected during the 4th Quarter of 2006 (October, November and December), the first quarter of Fiscal Year 2006/2007.
- Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.



# Property Manager Survey: 4th Quarter 2006

## Occupancy Rates

- **The average occupancy rate for the fourth quarter of 2006 was 64.6% - an 8.5 percentage point decrease compared to the same quarter last year (73.1%), and 7.7 percentage points higher than the prior quarter (56.9%).**
  - In 4Q2006, the average occupancy rate among properties with 101+ rooms (65.2%) was slightly higher than the average occupancy rate among properties with 50-100 rooms (60.9%).
- **Hotels in the Central and Southern regions of Palm Beach County reported comparable occupancy rates in 4Q2006 (65.5% and 65.9%, respectively), while hotels in the Northern region of PBC reported a lower average occupancy rate of 59.8%.**
  - Hotels from all three regions reported decreases in occupancy rates compared to the same quarter last year and increases compared to last quarter.
  - Compared to 4Q2005, the largest decrease in occupancy rates occurred among hotels in the Northern Region (from 73.8% to 59.8%, a 14.0 percentage point decrease).
  - Hotels in the Southern region reported the highest increase in occupancy rates compared to the previous quarter (from 53.5% in 3Q2006 to 65.9% in 4Q2006, a 12.4 percentage point increase).
- **The estimated number of Palm Beach County hotel room nights occupied\* in the fourth quarter of 2006 was 858,302 – a decrease of 98,646 room nights compared to 4Q2005 (956,948) and an increase of 88,673 room nights compared to the previous quarter (769,629).**
- **In 4Q2006, property managers were asked what percent of their occupancy was International. Overall, the average percentage of International guests among hotels that responded was 2.8%. This is comparable to 4Q2005 (2.7%) and is the same as last quarter.**
  - Smaller properties (50-100 rooms) reported more guests coming from foreign countries (4.5%) than larger properties (101+ rooms, 2.6%).
- **In terms of the purpose of the trip, during the fourth quarter of 2006 participating property managers reported that 38.6% of hotel guests were leisure travelers, 36.7% were business travelers and 24.7% were convention/group travelers.**
- **Hotels designated as convention hotels reported that 31.7% of their bookings were made by convention/group travelers. This represents a decrease of 3.7 percentage points compared to 4Q2005 (35.4%) and is at parity with last quarter (30.4%).**

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



# Property Manager Survey: 4th Quarter 2006

## Average Daily Room Rate (ADR)

- **According to participating Palm Beach County properties, in the fourth quarter of 2006 the average daily room rate (ADR) was \$134.03 – 2.7% lower than the ADR recorded in the fourth quarter last year (\$137.81) and 28.1% higher than the ADR in the previous quarter (\$104.60).**
  - The ADR among smaller properties (50-100 rooms, \$120.10) was comparable to the ADR reported by smaller properties in 4Q2005 (\$119.38), while the ADR among larger properties (101+ rooms, \$136.06) decreased by 3.9% compared to the ADR reported by larger properties in 4Q2005 (\$141.57).
  - Both smaller and larger properties reported increases in ADR compared to last quarter. Smaller properties (50-100 rooms) reported a 26.5% (\$25.19) increase in ADR compared to 3Q2006 (\$94.91), while larger properties (101+ rooms) reported a 28.3% (\$30.02) increase compared to last quarter (\$106.04).

## Future Business Outlook

- **Almost one-half of surveyed property managers (47.1%) expect an increase in hotels' room revenue for succeeding months as compared to the same months in 2005. Thirty-five percent predict a decrease and 18.0% expect no change in room revenue compared to one year ago.**
  - Among hotel managers expecting an increase in room revenue compared to the previous year, the average increase expected is 9.9%.
  - Among hotel managers expecting a decrease in room revenue compared to the previous year, the average decrease expected is 9.7%.

## Bookings Via Third Party Websites

- **The average percentage of bookings sold via third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc) in the fourth quarter of 2006 was 14.5% - an increase of 3.9 percentage points compared to 4Q2005 (10.6%) and comparable to last quarter (15.6%).**
  - In 4Q2006, smaller properties (50-100 rooms) continued to report a higher percentage of bookings sold via third party websites (26.4%) than larger properties (101+ rooms) (10.7%).



# Hotel Visitor Survey: 4th Quarter 2006

## Characteristics of Stay

- The average party size in 4Q2006 was 2.0, as it was last quarter and at parity with the same quarter last year (2.1). The median party size for the quarter, as well as for each month within the quarter was 2.0.
- During the fourth quarter of 2006, hotel guests stayed an average of 3.4 nights in a hotel and occupied an average of 1.4 rooms per night\*.
- In 4Q2006, Palm Beach County hosted considerably more business (conference/convention/ business meeting, 72.2%) travelers than leisure travelers (21.5%).
  - The percentage of business travelers was highest during the month of November (76.8%), while the percentage of vacationers was highest in the month of December (30.8%).
  - Compared to 4Q2005, the percentage of business travelers increased by 17.4 percentage points (from 54.8% in 4Q2005 to 72.2% in 4Q2006), while the percentage of vacationers decreased by 16.0 percentage points (from 37.5% to 21.5%).
  - The percentage of vacationers also declined compared to last quarter (by 3.4 percentage points, from 24.9% to 21.5%), while the percentage of business travelers increased by 6.4 percentage points (from 65.8% to 72.2%).

## Planning the Trip to Palm Beach County

- A 'work related trip' was the reason most visitors selected PBC over other destinations in 4Q2006 (68.6%). This represents an increase of 15.2 percentage point compared to 4Q2005 (53.4%) and an increase of 5.8 percentage points compared to last quarter (62.8%).
  - Other frequently mentioned reasons for selecting PBC over other destinations were 'visit friends/relatives' (14.2%) and 'previous visit' (9.3%).
- The percentage of short term planners in 4Q2006 (planned the trip one month or less in advance, 59.9%) increased by 9.4 percentage points compared to the same quarter last year (50.5%) and decreased by 10.1 percentage points compared to last quarter (70.0%).
- Most respondents reported that their employer made the decision regarding the trip to PBC (67.0%) - an increase of 13.7 percentage points compared to 4Q2005 (53.3%) and an increase of 5.4 percentage points compared to 3Q2006 (61.6%).

## Booking a Trip to Palm Beach County

- Twenty eight point three percent of surveyed hotel guests claimed to have used a travel agent to book any part of their trip to PBC in 4Q2006. This represents an increase of 6.9 percentage points compared to 4Q2005 (21.4%) and a 3.6 percentage point increase compared to last quarter (24.7%).

\* 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: 4th Quarter 2006

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

- **Use of the Internet to book at least part of visitors' trips to PBC (42.3%) decreased by 10.2 percentage points compared to 4Q2005 (52.5%) and by 6.3 percentage points compared to last quarter (48.6%).**
  - Among those hotel guests who used the Internet to book any part of their trip, most used it to book airfare (71.6%), hotel accommodations (65.4%), and/or car rental (40.8%).
  - Those who used the Internet to book their hotel rooms in 4Q2006 were most inclined to have used hotel websites (34.8%).
  - Only 7.7% of respondents cited that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meals, rental car, etc).
  - More than seven-in-ten surveyed visitors traveled by air to come to PBC during 4Q2006 (74.1%). This represents a decrease of 9.4 percentage points compared to 4Q2005 (83.5%) and a 3.4 percentage increase compared to last quarter (70.7%).

## Visitor Expenditures

- **In 4Q2006, the average per party\* expenditure in Palm Beach County was \$1,350 – \$109 (7.5%) less than the average per party expenditure in 4Q2005 (\$1,459) and \$300 (28.6%) more than last quarter (\$1,050).**
  - Compared to 4Q2005, there have been decreases in 'Lodging' (from \$823 to \$714, a 13.2% decrease), 'Gifts/Shopping' (from \$153 to \$122, a 20.3% decrease) and 'Local Travel' (from \$139 to \$129, a 7.2%). All spending categories experienced increases compared to last quarter.
  - The average per person expenditure in 4Q2006 was \$675, representing a slight decrease compared to 4Q2005 (\$695, a 2.9% decrease) and an increase compared to last quarter (\$525, a 28.6% increase).
- **Vacationers spent, on average, \$1,935 per party, while business travelers' per party average expenditure was \$1,141.**
  - Compared to last quarter, leisure and business per party expenditures increased by 32.3% and 28.6%, respectively (from \$1,463 to \$1,935, leisure travelers and from \$887 to \$1,141, business travelers).
  - Compared to 4Q2005, business travelers' per party expenditure decreased (from \$1,366 in 2005 to \$1,141 in 2006, a 16.5% increase), while leisure travelers' per party expenditure increased (from \$1,598 to \$1,935, a 21.1% increase).

## Characteristics of Visit

- **One-quarter of visitors surveyed during 4Q2006 were visiting Palm Beach County for the first time (25.4%) and the vast majority reported that Palm Beach County was their main destination (92.2%).**

\* 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: 4th Quarter 2006

## Characteristics of Visit (Continued)

- **Eighty-two point seven percent of surveyed hotel guests affirmed that they plan to return to Palm Beach County some time in the future.**
  - Among those who plan to visit Palm Beach County again, 70.8% plan to do so in the next year; 39.7% within the next three months.
  - Only 3.7% of surveyed visitors claimed to have no plans to return to PBC. The most frequently mentioned reasons provided for not returning were 'too far' (15.3%) and 'no business in the area' (11.1%).
- The percentage of those who stated that the rising cost of transportation, due to rising fuel costs, would not affect their decision to come to Palm Beach County (56.7%, rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all) was comparable to 4Q2005 (57.9%) and increased by 3.5 percentage points compared to last quarter (53.2%).
- Fifty three point six percent of surveyed guests reported that generally increasing travel costs would not influence their decision to come to PBC (rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). This is about the same as last quarter (52.0%).
- **More than nine-in-ten visitors reported dining at area restaurants (94.1%) in 4Q2006. Visitors also frequently mentioned going shopping (25.9%) and going to the beach (17.3%).**
  - The percentage of hotel guests who claimed to have shopped increased consistently during the fourth quarter of 2006 (from 19.5% in October to 22.9% in November to 34.4% in December).

## Attitudes toward Palm Beach County

- **When hotel guests were asked what they liked best about their trip to Palm Beach County in 4Q2006, 'climate/weather' was mentioned most often (42.0%).**
- **'Traffic/bad drivers' was the aspect visitors liked least about their trip to PBC in 4Q2006 (36.8%), followed by 'humidity/poor weather' (14.9%).**
- When asked what would make their next trip to Palm Beach County better, visitors most frequently mentioned a 'longer stay' (15.6%), 'less business and more partying/more free time' (13.2%) and 'come during vacation time' (12.5%).

## Characteristics of Visitors

- **Palm Beach County visitors continued to describe themselves as White/Caucasian (90.5%), between the ages of 35 and 54 (52.9%), professionals (63.5%), and with an annual household income of \$100,000 or greater (65.2%).**
- Most often, visitors were traveling alone (37.3%) or with business associates (32.5%).
- More than nine-in-ten visitors were traveling domestically (92.5%).





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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: 4th Quarter 2006

	<u>Total</u> <u>4Q 2006</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	<u>Total</u> <u>4Q 2005</u>	<u>Total</u> <u>1Q 2006</u>	<u>Total</u> <u>2Q 2006</u>	<u>Total</u> <u>3Q 2006</u>
<b>Occupancy Rate</b>								
Month/Quarter	64.6%	62.0%	69.0%	62.7%	73.1%	84.7%	71.0%	56.9%
FYTD (Oct. - Set.)	64.6%	62.0%	65.5%	64.6%	72.4%	78.4%	76.0%	71.2%
<b>Room Nights Occupied<sup>1*</sup></b>								
Month/Quarter	858,302	277,921	299,322	281,059	956,948+	1,138,435	964,792	769,629
FYTD (Oct. - Set.)	858,302	277,921	577,243	858,302	956,948+	2,095,383	3,060,175	3,829,804
<b>Percentage of Room Nights Occupied</b>								
Leisure	38.6%	34.1%	36.9%	44.9%	35.4%	40.4%	37.5%	39.8%
Business	36.7%	39.2%	36.4%	34.5%	34.7%	34.5%	32.0%	35.3%
Convention/Group	24.7%	26.7%	26.7%	20.6%	30.0%	25.2%	30.5%	24.9%
<b>Average Daily Room Rate<sup>2</sup></b>	\$134.03	\$122.01	\$131.16	\$149.45	\$137.81	\$204.12	\$142.96	\$104.60

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

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

2. ADR = Average rate per occupied room.

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



## Property Manager Survey: 4th Quarter 2006

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>99/00</u>	<u>00/01</u>	<u>01/02</u>	<u>02/03</u>	<u>03/04</u>	<u>04/05</u>	<u>05/06</u>	<u>06/07</u>
4th Quarter (Oct/Nov/Dec)	N/A	N/A	57.5	59.8	64.2	79.8	73.1	64.6
October	66.3	63.0	54.3	59.2	61.7	84.5	61.2	62.0
November	69.7	69.7	59.6	60.8	67.0	80.8	82.3	69.0
December	63.3	63.5	58.4	59.4	64.0	74.0	73.8	62.7
1st Quarter (Jan/Feb/Mar)	N/A	N/A	76.2	77.9	83.8	88.3	84.7	N/A
2nd Quarter (April/May/June)	N/A	N/A	65.1	67.0	71.8	72.7	71.0	N/A
3rd Quarter (July/August/Sept.)	N/A	N/A	57.3	57.8	64.2	63.0	56.9	N/A
<b>Fiscal YTD (Oct. – Sept.)</b>	<b>68.8</b>	<b>67.3</b>	<b>64.1</b>	<b>65.7</b>	<b>70.9</b>	<b>76.0</b>	<b>71.2</b>	<b>64.6</b>
<b>Number of Room Nights Occupied in 4th Quarter*</b>							956,948+	858,302

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

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



# Property Manager Survey: 4th Quarter 2006

	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Conference/Convention Bookings</b>								
<u>All Hotels</u>								
% Occupied Room Nights in County	24.7%	26.7%	26.7%	20.6%	30.0%	25.2%	30.5%	24.9%
Occupied Room Nights in County	212,303	74,205	79,919	58,179	302,473	291,689	299,502	191,074
Occupied Room Nights in County FYTD (Oct.- Sept.)	212,303	74,205	154,124	212,303	302,473	594,162	893,664	1,084,738
<u>Convention Hotels</u>								
% Occupied Room Nights	31.7%	33.8%	34.9%	25.7%	35.4%	30.5%	36.1%	30.4%
Occupied Room Nights	163,663	56,785	64,234	43,316	157,068	213,289	213,971	138,862
Occupied Room Nights FYTD (Oct.- Sept.)	163,663	56,785	120,347	163,663	157,068	370,357	584,328	723,190
<b>Available Inventory*</b>								
Rooms in County	43,380	14,460**	14,460**	14,460**	43,083+	45,020	44,737	44,014
Room Nights	1,330,320	448,260	433,800	448,260	1,321,198+	1,350,518	1,357,026	1,349,968
Room Nights FYTD (Oct.- Sept.)	1,330,320	448,260	882,060	1,330,320	1,321,198+	2,671,716	4,028,742	5,378,710
<b>Response Rate</b>								
Month/Quarter (for all hotels in County)	61.8%	64.2%	60.7%	60.6%	55.1%	59.7%	60.0%	61.5%
FYTD (Oct.- Sept.)	61.8%	64.2%	62.5%	61.8%	55.1%	57.4%	58.3%	59.1%

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

\* 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: 4th Quarter 2006

Occupancy Rate	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Size of Hotel</b>								
50 - 100 Rooms	60.9%	57.9%	67.6%	56.7%	75.7%	88.1%	69.3%	52.9%
101 + Rooms	65.2%	62.6%	69.5%	63.6%	72.6%	84.1%	71.3%	57.4%
101-219	65.5%	62.6%	69.8%	63.9%	75.7%	84.5%	68.2%	58.1%
220-500	65.8%	62.9%	69.6%	65.2%	70.1%	82.4%	76.9%	57.9%
All Properties	64.6%	62.0%	69.0%	62.7%	73.1%	84.7%	71.0%	56.9%
<b>Geographic Region</b>								
North	59.8%	57.1%	66.0%	56.6%	73.8%	83.4%	73.1%	55.7%
Central	65.5%	62.7%	71.1%	62.8%	74.3%	84.5%	70.6%	61.1%
South	65.9%	63.7%	68.6%	65.4%	71.5%	85.6%	70.5%	53.5%

What percent of your occupancy is international?	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Size of Hotel</b>								
50-100 Rooms	4.5%	4.3%	6.2%	3.4%	1.9%	11.5%	3.6%	2.5%
101 + Rooms	2.6%	2.4%	2.8%	2.7%	2.6%	3.1%	2.6%	2.7%
101-219	2.6%	2.8%	2.4%	2.7%	3.4%	4.0%	2.8%	3.2%
220-500	1.3%	1.3%	0.8%*	2.0%*	0.8%	1.5%	1.2%	0.7%
All Properties	2.8%	2.6%	3.1%	2.7%	2.7%	4.5%	2.8%	2.8%
<b>Geographic Region</b>								
North	3.2%	2.1%	1.4%	6.4%*	1.4%	1.4%	1.2%	1.2%
Central	2.8%	1.9%	3.9%	2.7%	2.2%	5.2%	2.6%	2.3%
South	2.7%	4.7%	1.9%	1.9%	3.8%	5.7%	3.9%	4.3%

\* Caution: Extremely low base



## Property Manager Survey: 4th Quarter 2006

Average Daily Room Rate	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Size of Hotel</b>								
<u>50 - 100 Rooms</u>	\$120.10	\$113.02	\$115.85	\$134.69	\$119.38	\$164.79	\$117.22	\$94.91
<u>101 + Rooms</u>	\$136.06	\$123.49	\$133.62	\$151.30	\$141.57	\$211.07	\$146.99	\$106.04
101-219	\$92.56	\$91.27	\$91.55	\$95.13	\$109.19	\$154.43	\$101.80	\$85.25
220-500	\$134.95	\$124.80	\$132.36	\$147.25	\$147.65	\$220.64	\$159.02	\$109.37
<u>All Properties</u>	\$134.03	\$122.04	\$131.16	\$149.45	\$137.81	\$204.12	\$142.96	\$104.60





# Property Manager Survey: 4th Quarter 2006

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
<b>4Q</b>		
2004	1,052,362+	
2005	956,948+	- 9.1
2006	858,302	- 10.3
<b>October</b>		
2004	365,945+	
2005	265,830+	- 27.4
2006	277,921	4.5
<b>November</b>		
2004	351,722+	
2005	354,697+	0.8
2006	299,322	- 15.6
<b>December</b>		
2004	334,695+	
2005	336,421+	0.5
2006	281,059	- 16.5
<b>1Q</b>		
2004	1,186,693	
2005	1,173,859+	- 1.1
2006	1,138,435	- 3.0
<b>2Q</b>		
2004	1,022,634	
2005	969,020+	- 5.2
2006	964,792	- 0.4
<b>3Q</b>		
2004	859,630	
2005	862,035+	0.3
2006	769,629	- 10.7
<b>FYTD (October – December)</b>		
2004	1,052,362+	
2005	956,948+	- 9.1
2006	858,302	- 10.3

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

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



## Property Manager Survey: 4th Quarter 2006

Future Business Outlook (for each month as compared to the same month in previous year)	<u>Total Room Revenue</u>	<u>Group/Indiv. Business Room Revenue</u>	<u>Individual Vacation Room Revenue</u>
<b>November 2006 / December 2006 predictions from October</b>			
<b>Foresee Decrease</b>	43.6%	48.1%	42.8%
Average decrease (among those who foresee decrease)	12.5%	14.2%	10.0%
<b>Foresee No Change</b>	13.7%	10.8%	26.8%
<b>Foresee Increase</b>	42.7%	41.1%	30.4%
Average increase (among those who foresee increase)	8.1%	8.3%	7.6%
<b>December 2006 / January 2007 predictions from November</b>			
<b>Foresee Decrease</b>	34.7%	31.4%	27.5%
Average decrease (among those who foresee decrease)	5.0%	7.2%	6.2%
<b>Foresee No Change</b>	23.6%	23.3%	38.9%
<b>Foresee Increase</b>	41.7%	45.3%	33.6%
Average increase (among those who foresee increase)	9.2%	9.7%	11.9%
<b>January 2007 / February 2007 predictions from December</b>			
<b>Foresee Decrease</b>	24.7%	31.3%	17.0%
Average decrease (among those who foresee decrease)	11.4%	13.0%	10.5%
<b>Foresee No Change</b>	16.8%	21.5%	24.6%
<b>Foresee Increase</b>	58.5%	47.1%	58.5%
Average increase (among those who foresee increase)	12.0%	9.1%	7.9%
<b>Fourth Quarter predictions from October, November, December</b>			
<b>Foresee Decrease</b>	35.0%	37.4%	29.6%
Average decrease (among those who foresee decrease)	9.7%	11.8%	8.9%
<b>Foresee No Change</b>	18.0%	18.2%	30.3%
<b>Foresee Increase</b>	47.1%	44.4%	40.0%
Average increase (among those who foresee increase)	9.9%	9.1%	9.0%



## Property Manager Survey: 4th Quarter 2006

Bookings via third party website	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Size of Hotel</b>								
<u>50 - 100 Rooms</u>	26.4%	23.3%	34.0%	18.5%	14.3%	15.9%	12.4%	20.7%
<u>101 + Rooms</u>	10.7%	10.5%	7.7%	14.2%	8.0%	8.7%	12.6%	12.9%
101-219	11.5%	11.5%	7.6%	15.8%	9.1%	9.7%	14.9%	13.9%
220-500	7.5%	7.6%	9.5%*	5.5%	2.6%	5.3%	4.9%	9.6%
<u>All Properties</u>	14.5%	14.0%	14.3%	15.5%	10.6%	11.1%	13.5%	15.6%

\* Caution: Low base



# Hotel Visitor Survey



# Methodology

## Hotel Visitor Survey

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

## Survey Changes

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

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

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

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

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



# Methodology

## Hotel Visitor Survey

### Survey changes (continued):

- 'Cultural Activities' (Question 3) was merged with 'Arts and Cultural Event' (Question 5).
- 'PBC CVB literature' now reads 'Palm Beach County Convention and Visitors Bureau information/website'.
- 'Hotel brochure' was changed to 'Hotel brochure/website'.
- 'Attractions brochure' changed to 'Attractions brochure/website'.
- 'Saw an advertisement/promotion/article' (Question 3), 'Newspaper or magazine article' (Question 5), 'Newspaper or magazine advertisement' (Question 5) were combined into 'Media Coverage'.
- 'Sporting event (other than Spring Training)' (question 5) was replaced with 'Attend a sporting event'.
- The answer 'Internet information' was replaced with 'other Internet sources'.
- The answers 'Bus Tour' and 'Spanish language media' were added.

- Multiple responses are now accepted for the question "How did you get here?". Also, responses of Bus and Train were added to the list.

- Side trips have been excluded from computation of visitors expenditures (no longer asked on survey).

- In order to obtain a more accurate estimate of lodging expenditures, visitors are now asked directly how much they are paying for their hotel room instead of how much their party spent with lodging per day and in total. The amount spent with lodging per day is then calculated by multiplying room rate x number of rooms rented x 10.5% sales taxes.

- Two new questions were added: "What would make your next visit better?" and "To what extent if at all, might the rising cost of transportation, due to rising fuel costs, influence your decision whether or not to visit Palm Beach County?."



# Methodology

## Hotel Visitor Survey

### Survey changes (continued):

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

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

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

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

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

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

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





## Hotel Survey: 4th Quarter 2006

Characteristics of Stay	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
Average Party Size *	2.0	2.0	1.9	2.1	2.1	2.1	2.2	2.0
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.5	3.2	3.8	3.4	3.7	4.7	3.6	3.3
Nights in Hotel	3.4	3.1	3.6	3.3	3.4	4.4	3.4	3.2
Rooms per Night *	1.4	1.3	1.4	1.4	1.3	1.3	1.4	1.3

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



## Hotel Survey: 4th Quarter 2006

Visitor Expenditures	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Average Expenditure Per Visit</b>								
Lodging	\$714	\$580	\$752	\$772	\$823	\$1,461	\$826	\$554
Restaurant/Bar	\$320	\$257	\$346	\$340	\$296	\$519	\$323	\$243
Gifts/Shopping	\$122	\$84	\$144	\$129	\$153	\$158	\$133	\$93
Entertainment/Recreation	\$65	\$25	\$36	\$119	\$48	\$106	\$31	\$38
Local Travel	\$129	\$109	\$158	\$116	\$139	\$207	\$143	\$122
Total Per Party	\$1,350	\$1,054	\$1,436	\$1,475	\$1,459	\$2,451	\$1,455	\$1,050
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$675	\$527	\$756	\$702	\$695	\$1,167	\$661	\$525
Total Per Person/Per Day	\$199	\$170	\$210	\$213	\$204	\$265	\$195	\$164
Lodging	\$105	\$94	\$110	\$111	\$115	\$158	\$110	\$87
Restaurant/Bar	\$47	\$42	\$51	\$49	\$41	\$56	\$43	\$38
Gifts/Shopping	\$18	\$14	\$21	\$19	\$21	\$17	\$18	\$15
Entertainment/Recreation	\$10	\$4	\$5	\$17	\$7	\$11	\$4	\$6
Local Travel	\$19	\$18	\$23	\$17	\$20	\$22	\$19	\$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.

- Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey). Prior data shown has been recalculated to reflect this change.

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



## Hotel Survey: 4th Quarter 2006

Visitor Expenditures	Pleasure							
	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Average Expenditure Per Visit</b>								
Lodging	\$882	\$770	\$968	\$918	\$821	\$2,040	\$1,051	\$675
Restaurant/Bar	\$463	\$296	\$630	\$504	\$292	\$588	\$449	\$328
Gifts/Shopping	\$320	\$218	\$484	\$303	\$277	\$294	\$269	\$234
Entertainment/Recreation	\$107	\$56	\$28	\$189	\$68	\$126	\$66	\$101
Local Travel	\$164	\$111	\$230	\$168	\$140	\$270	\$152	\$125
<b>Total Per Party</b>	<b>\$1,935</b>	<b>\$1,450</b>	<b>\$2,341</b>	<b>\$2,083</b>	<b>\$1,598</b>	<b>\$3,318</b>	<b>\$1,993</b>	<b>\$1,463</b>
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$744	\$580	\$936	\$801	\$615	\$1,383	\$687	\$542
Total Per Person/Per Day	\$182	\$157	\$199	\$195	\$171	\$230	\$176	\$139
Lodging	\$83	\$83	\$82	\$86	\$88	\$142	\$93	\$64
Restaurant/Bar	\$43	\$32	\$54	\$47	\$31	\$41	\$40	\$31
Gifts/Shopping	\$30	\$24	\$41	\$28	\$30	\$20	\$24	\$22
Entertainment/Recreation	\$10	\$6	\$2	\$18	\$7	\$9	\$6	\$10
Local Travel	\$15	\$12	\$20	\$16	\$15	\$19	\$13	\$12

- 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.

- Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey). Prior data shown has been recalculated to reflect this change.

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



## Hotel Survey: 4th Quarter 2006

Visitor Expenditures	Business							
	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Average Expenditure Per Visit</b>								
Lodging	\$648	\$522	\$690	\$699	\$828	\$1,030	\$704	\$502
Restaurant/Bar	\$270	\$244	\$284	\$264	\$304	\$414	\$257	\$209
Gifts/Shopping	\$62	\$49	\$66	\$61	\$63	\$79	\$65	\$41
Entertainment/Recreation	\$47	\$17	\$40	\$84	\$30	\$82	\$12	\$17
Local Travel	\$115	\$104	\$139	\$96	\$142	\$154	\$130	\$119
Total Per Party	\$1,141	\$937	\$1,218	\$1,204	\$1,366	\$1,758	\$1,169	\$887
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$634	\$520	\$716	\$669	\$804	\$1,005	\$687	\$555
Total Per Person/Per Day	\$204	\$179	\$217	\$231	\$244	\$320	\$222	\$191
Lodging	\$116	\$100	\$123	\$134	\$148	\$187	\$134	\$108
Restaurant/Bar	\$48	\$47	\$51	\$51	\$54	\$75	\$49	\$45
Gifts/Shopping	\$11	\$9	\$12	\$12	\$11	\$14	\$12	\$9
Entertainment/Recreation	\$8	\$3	\$7	\$16	\$5	\$15	\$2	\$4
Local Travel	\$21	\$20	\$25	\$18	\$25	\$28	\$25	\$26

- 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.

- Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey). Prior data shown has been recalculated to reflect this change.

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



## Hotel Survey: 4th Quarter 2006

Planning the Trip to Palm Beach County	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Reason for Trip</b>								
Conference/Convention/ Business Meeting	72.2%	75.6%	76.8%	63.8%	54.8%	55.4%	63.3%	65.8%
- Business Meeting	60.7%	61.7%	65.7%	54.4%	47.9%	47.5%	54.0%	59.1%
- Conference/Convention	10.2%	11.5%	9.9%	9.0%	5.1%	6.9%	7.3%	4.8%
- Other Business	1.3%	2.5%	1.2%	0.4%	1.8%	1.1%	2.0%	1.8%
Vacation/Pleasure	21.5%	17.6%	16.4%	30.8%	37.5%	36.3%	31.5%	24.9%
Sporting Event	3.0%	1.8%	4.7%	2.5%	3.1%	5.2%	1.8%	2.4%
Cultural Event/Attraction	0.4%	0.0%	0.4%	0.8%	0.3%	0.0%	0.5%	0.7%
Film/TV location scouting/production	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%
Other	3.0%	5.0%	1.6%	2.2%	4.1%	2.1%	2.8%	6.0%
<b>Who Made the Decision*</b>								
Employer	67.0%	67.7%	71.2%	62.3%	53.3%	54.9%	62.7%	61.6%
Head of Household/ Other adult	26.3%	27.0%	25.7%	26.5%	38.9%	41.1%	31.8%	32.7%
Family Living in PBC	6.4%	5.0%	3.1%	11.1%	8.1%	4.9%	5.8%	5.7%
Children Influenced Decision	0.5%	0.7%	0.0%	0.8%	2.1%	1.8%	1.1%	1.4%
<b>Advanced Planning</b>								
One Month or Less	59.9%	63.6%	61.3%	54.9%	50.5%	50.6%	56.6%	70.0%
2 to 3 Months	22.1%	20.7%	22.9%	22.9%	26.1%	24.3%	24.8%	16.6%
More than 3 Months	18.0%	15.7%	15.8%	22.2%	23.4%	25.1%	18.5%	13.5%

\* Multiple responses accepted.



## Hotel Survey: 4th Quarter 2006

Planning the Trip to Palm Beach County (Continued)	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Reasons for Selecting Palm Beach County Over Other Destinations*</b>								
Work Related Trip	68.6%	72.4%	73.2%	59.9%	53.4%	55.9%	61.6%	62.8%
Visit Friends/Relatives	14.2%	10.5%	9.8%	22.3%	25.2%	21.1%	19.1%	17.4%
Previous Visit	9.3%	6.7%	8.9%	12.2%	9.1%	10.9%	8.6%	11.1%
Special Event	5.4%	5.3%	4.4%	6.5%	6.5%	4.4%	6.9%	3.9%
Convenient Flights	3.2%	2.6%	2.8%	4.1%	9.3%	7.4%	7.1%	5.8%
Golf/Tennis/Recreation	2.9%	1.7%	4.7%	2.2%	2.8%	5.5%	3.0%	1.7%
Weather	2.2%	0.8%	1.6%	4.3%	7.5%	9.8%	8.6%	3.2%
Beaches	2.1%	0.7%	0.3%	5.1%	4.0%	4.2%	6.5%	3.0%
Hotel Brochure/Website	1.4%	1.1%	0.6%	2.6%	1.4%	0.6%	1.5%	0.4%
Friends/Relatives recommendation	1.4%	1.4%	1.4%	1.3%	2.9%	3.5%	4.1%	2.3%
Attend Sporting Event	1.3%	1.3%	1.4%	1.2%	2.1%	2.7%	0.9%	1.6%
Art/Cultural Event	0.6%	0.3%	0.5%	1.1%	0.3%	1.3%	1.0%	1.2%
Attraction Brochure/Website	0.5%	1.2%	0.0%	0.3%	0.6%	0.5%	0.8%	0.4%
Bus Tour	0.3%	0.5%	0.5%	0.0%	0.5%	0.1%	0.1%	0.2%
Other Internet Sources	0.2%	0.0%	0.0%	0.6%	1.0%	0.7%	0.5%	0.6%
Compete in Sporting Event	0.2%	0.0%	0.0%	0.5%	1.5%	0.4%	0.7%	0.1%
Travel Agency	0.1%	0.0%	0.0%	0.3%	0.0%	0.6%	0.3%	0.1%
Spanish Language Media	0.1%	0.0%	0.0%	0.3%	0.4%	0.0%	0.0%	0.0%
PBC-CVB Information/Website	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.1%
County/State Tourist Agency	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Media Coverage	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.0%
Spring Training	0.0%	0.0%	0.0%	0.0%	0.2%	1.6%	0.4%	0.0%
Other	4.7%	5.0%	4.0%	5.2%	5.7%	5.1%	3.3%	4.8%

\* Multiple responses accepted.



## Hotel Survey: 4th Quarter 2006

Planning the Trip to Palm Beach County (Continued)	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Booked Trip with Travel Agency</b>								
Yes	28.3%	29.1%	27.3%	28.3%	21.4%	26.1%	25.6%	24.7%
No	71.7%	70.9%	72.7%	71.7%	78.6%	73.9%	74.4%	75.3%
<b>Booked Any Part of Trip Using Internet</b>								
Yes	42.3%	38.0%	45.5%	43.5%	52.5%	44.1%	46.0%	48.6%
No	57.7%	62.0%	54.5%	56.5%	47.5%	55.9%	54.0%	51.4%
<b>Booked Any Part of Trip Using Internet* (among those who used the Internet)</b>								
Air	71.6%	70.2%	70.0%	75.1%	78.3%	79.2%	74.2%	64.7%
Hotel	65.4%	68.0%	73.8%	55.5%	54.6%	55.2%	61.3%	71.5%
Hotel website	34.8%	33.0%	44.2%	27.5%	28.7%	31.8%	27.6%	35.4%
Travelocity	2.8%	0.0%	3.9%	4.4%	1.5%	1.0%	3.9%	4.8%
hotels.com	2.2%	1.3%	0.7%	4.1%	1.8%	1.2%	1.3%	2.2%
Expedia	1.6%	3.3%	1.4%	0.0%	4.0%	2.6%	4.2%	1.9%
Orbitz	1.1%	3.6%	0.0%	0.0%	1.8%	2.0%	2.1%	0.5%
PBC CVB Website	0.7%	0.9%	0.0%	1.1%	0.0%	0.0%	0.3%	0.0%
Hotwire	0.4%	0.0%	1.1%	0.0%	0.3%	0.3%	0.3%	0.4%
Other Website	4.4%	6.0%	4.6%	3.0%	3.8%	4.5%	4.5%	6.3%
Don't Remember	17.7%	20.0%	18.0%	15.3%	12.5%	11.7%	17.1%	20.0%
Car Rental	40.8%	41.6%	44.9%	37.1%	43.2%	38.7%	40.3%	42.1%
Tickets to Event	0.8%	0.0%	1.4%	0.8%	0.7%	2.0%	1.0%	1.7%
Other	2.9%	5.2%	0.7%	3.0%	4.6%	3.6%	5.6%	4.5%
<b>Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)</b>								
Yes	7.7%	5.0%	9.5%	7.4%	11.7%	10.3%	10.1%	5.7%
No	92.3%	95.0%	90.5%	92.6%	88.3%	89.7%	89.9%	94.3%
<b>Type of Transportation**</b>								
Airplane	74.1%	72.7%	70.8%	79.0%	83.5%	81.8%	80.1%	70.7%
Car	30.6%	33.4%	33.2%	24.8%	23.8%	23.9%	24.2%	33.1%
Other	0.7%	0.6%	0.4%	0.9%	1.0%	0.8%	1.1%	0.6%

\* Multiple responses accepted. \*\*Multiple responses accepted starting in October 2005.





## Hotel Survey: 4th Quarter 2006

Characteristics of the Visit	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Plan to Return to PBC</b>								
Yes	82.7%	83.9%	79.9%	84.0%	80.8%	78.1%	82.0%	83.9%
No	3.7%	3.4%	4.7%	3.0%	3.5%	3.2%	3.1%	2.3%
Don't know	13.6%	12.7%	15.5%	13.1%	15.6%	18.7%	14.9%	13.8%
<b>If no, why not?*</b>								
(Top mentions – 5% or higher)	n = 27	n = 8	n = 12	n = 7			n = 21	n = 17
Too far	15.3%	2	1	1	N/A	N/A	0.0%	0.0%
No business in the area	11.1%	0	2	1	N/A	N/A	23.3%	25.1%
Too expensive	8.3%	2	0	0	N/A	N/A	0.0%	6.6%
Family moving away	7.1%	0	0	2	N/A	N/A	4.8%	0.0%
Job hunting	4.1%	1	0	0	N/A	N/A	0.0%	7.3%
Probate office people are rude	0.0%	0	0	0	N/A	N/A	0.0%	7.3%
Did not like Singer Island	0.0%	0	0	0	N/A	N/A	0.0%	6.6%
No fun	0.0%	0	0	0	N/A	N/A	0.0%	6.5%
No interest	0.0%	0	0	0	N/A	N/A	0.0%	5.0%
Going to other places/I like changing destinations	0.0%	0	0	0	N/A	N/A	24.1%	0.0%
No reason/No answer	30.2%	2	5	1	N/A	N/A	42.9%	31.3%
<b>When do you plan on returning to PBC?</b>								
Within the next 3 months	39.7%	40.1%	42.2%	37.0%	34.7%	26.2%	30.4%	42.2%
Within the next 6 months	12.1%	8.8%	13.4%	14.0%	9.5%	8.1%	12.2%	12.0%
Within the next year	19.0%	13.9%	18.6%	24.0%	18.2%	30.4%	22.3%	16.2%
Within the next few years	4.3%	1.6%	5.3%	6.0%	5.9%	10.1%	7.1%	4.2%
Don't Know	24.9%	35.5%	20.5%	18.9%	31.7%	25.3%	27.9%	25.4%

\*Multiple responses accepted.

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



## Hotel Survey: 4th Quarter 2006

Characteristics of the Visit	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b><u>Influence of fuel cost</u></b>								
5 – Strong consideration	4.1%	3.2%	4.7%	4.2%	5.2%	6.6%	5.6%	5.5%
4	4.0%	5.0%	2.7%	4.5%	5.2%	5.2%	4.2%	6.6%
3	9.6%	8.8%	7.4%	12.3%	12.6%	10.5%	8.1%	10.7%
2	2.5%	3.3%	1.8%	2.2%	8.6%	6.6%	7.0%	5.8%
1 – No consideration at all	54.2%	57.5%	57.2%	47.8%	49.3%	56.3%	51.5%	47.4%
I don't make the decision	25.6%	22.2%	26.3%	28.8%	19.1%	14.7%	23.5%	24.0%
<b><u>Influence of generally increasing travel costs</u></b>								
5 – Strong consideration	4.7%	3.7%	5.7%	4.4%	N/A	N/A	5.3%	5.0%
4	3.5%	5.0%	1.4%	4.4%	N/A	N/A	5.2%	6.5%
3	10.2%	8.3%	10.1%	12.0%	N/A	N/A	10.1%	11.7%
2	3.9%	4.7%	3.8%	2.9%	N/A	N/A	8.5%	7.4%
1 – No consideration at all	49.7%	53.6%	52.3%	42.8%	N/A	N/A	44.7%	44.6%
I don't make the decision	28.1%	24.6%	26.7%	33.5%	N/A	N/A	26.2%	24.9%
<b><u>Main Destination</u></b>								
Palm Beach County	92.2%	90.9%	93.4%	92.4%	89.4%	90.6%	91.3%	92.8%
<b><u>First Trip to PBC</u></b>								
	25.4%	30.1%	22.8%	23.3%	22.4%	26.7%	26.9%	26.7%
<b><u>Description of Travel Party*</u></b>								
Self Only	37.3%	39.1%	39.5%	33.6%	28.7%	28.8%	33.0%	40.1%
Business Associates	32.5%	33.9%	32.7%	30.7%	25.5%	23.7%	28.0%	24.6%
Adult family members or friends	29.6%	27.0%	27.5%	34.3%	44.6%	47.4%	38.2%	33.7%
Children <12 years of age	4.6%	3.7%	3.6%	6.1%	9.3%	5.0%	8.1%	6.9%
Grandchildren <12 years of age	0.1%	0.0%	0.0%	0.4%	1.3%	0.3%	0.3%	0.3%

\*Multiple responses accepted.



## Hotel Survey: 4th Quarter 2006

Characteristics of the Visit (Continued)	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Participation in Specific Activities*</b>								
Restaurants	94.1%	94.7%	95.0%	92.8%	91.5%	92.4%	93.0%	92.5%
Shopping	25.9%	19.5%	22.9%	34.4%	40.0%	38.9%	33.5%	28.3%
Went to Beach	17.3%	17.4%	17.9%	16.4%	25.3%	26.3%	30.7%	24.1%
Visited downtown West Palm Beach Attractions/City Place	10.9%	6.8%	12.4%	13.5%	8.7%	12.1%	12.2%	8.3%
Bars/Nightclubs	10.1%	10.1%	8.2%	11.5%	12.4%	12.5%	13.2%	8.6%
Swimming	9.9%	10.6%	7.4%	11.6%	12.8%	11.7%	24.2%	13.6%
Golf, Tennis	9.1%	7.9%	11.2%	8.2%	10.5%	18.8%	8.7%	6.5%
Visited downtown Delray Beach Attractions	5.8%	5.2%	9.8%	2.5%	7.8%	8.6%	7.7%	4.5%
Visited Mizner Park/Boca Raton	4.3%	3.6%	3.9%	5.1%	7.5%	9.7%	8.3%	2.9%
Performing Arts (plays, concerts, dance)	2.2%	0.0%	1.0%	5.4%	1.5%	3.0%	2.0%	0.7%
Visited Wildlife Refuge	2.1%	1.3%	1.5%	3.5%	3.4%	3.7%	3.9%	1.5%
Visited Downtown at the Gardens	1.8%	1.3%	1.9%	2.2%	1.7%	2.8%	1.7%	0.4%
Fishing	1.6%	2.2%	0.9%	1.5%	1.7%	1.8%	0.9%	0.5%
Visited downtown Lake Worth	1.2%	0.9%	0.9%	1.9%	1.4%	2.2%	1.9%	0.3%
Attended a Sporting Event	1.0%	0.0%	1.9%	1.3%	2.4%	3.6%	1.8%	1.0%
Visited Riviera Beach/Singer Island	1.0%	0.7%	0.9%	1.5%	1.4%	1.8%	1.5%	0.7%
Boating	0.9%	0.7%	1.6%	0.3%	1.7%	1.8%	3.2%	1.1%
Museums, Art galleries	0.7%	0.3%	0.3%	1.5%	3.0%	6.8%	3.8%	1.4%
Attractions	0.6%	0.3%	0.3%	1.2%	3.1%	3.3%	3.4%	0.7%
Gambling Cruise	0.4%	0.3%	0.0%	0.9%	1.8%	0.7%	0.7%	0.5%
Snorkeling	0.3%	0.3%	0.0%	0.5%	0.5%	1.0%	1.2%	0.6%
Competed in Sports Event	0.3%	0.4%	0.0%	0.5%	1.2%	0.9%	0.6%	0.3%
Diving	0.2%	0.3%	0.0%	0.3%	0.1%	0.3%	1.0%	0.3%
Kite Surfing	0.2%	0.0%	0.0%	0.5%	0.1%	0.2%	0.0%	0.0%
Pari-mutuels (dog-track)	0.1%	0.3%	0.0%	0.0%	0.3%	0.4%	0.1%	0.7%
Surfing	0.1%	0.3%	0.0%	0.0%	0.4%	0.6%	0.3%	0.4%
Palm Beach County Convention Center	0.1%	0.3%	0.0%	0.0%	0.0%	0.4%	0.4%	0.0%
Other	7.6%	8.1%	9.3%	5.6%	4.8%	7.6%	5.6%	5.2%

\*Multiple responses accepted.



## Hotel Survey: 4th Quarter 2006

Attitudes about Trip to Palm Beach County	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Things Liked Best – Top Mentions</b>								
Climate/Weather	42.0%	40.7%	44.8%	40.7%	41.9%	49.5%	35.1%	25.3%
Beaches/Ocean	9.5%	12.6%	8.3%	7.9%	10.0%	7.9%	12.3%	18.7%
Beautiful Area/Nice Place	7.5%	8.8%	7.5%	6.3%	6.3%	5.6%	6.0%	8.5%
Nice People	4.9%	6.8%	5.1%	3.0%	4.2%	4.2%	4.0%	4.7%
Cleanliness	4.6%	4.6%	4.3%	4.8%	3.6%	3.2%	4.7%	4.6%
Visiting Friends/Friends	3.7%	2.2%	3.0%	5.8%	5.8%	3.2%	4.0%	4.2%
Shopping	2.8%	3.7%	0.9%	3.9%	1.7%	1.1%	1.6%	1.8%
Hotel	2.7%	1.8%	3.4%	2.8%	3.7%	3.7%	4.0%	4.1%
Golf	2.7%	1.1%	4.5%	2.2%	1.5%	1.8%	1.9%	1.8%
Relaxing Atmosphere	2.3%	1.7%	1.1%	3.9%	2.3%	2.7%	4.8%	3.5%
Restaurant	2.2%	2.6%	1.7%	2.3%	2.6%	1.9%	3.6%	2.9%
Palm Trees	1.9%	1.8%	2.3%	1.7%	1.4%	0.5%	1.4%	1.6%
Location	1.9%	2.3%	1.1%	2.1%	0.3%	0.8%	1.0%	1.9%
Everything	1.3%	0.0%	1.1%	2.7%	3.4%	1.4%	3.3%	1.4%
Other	10.0%	9.3%	10.9%	9.9%	11.3%	12.5%	12.3%	15.0%



## Hotel Survey: 4th Quarter 2006

Attitudes about Trip to Palm Beach County	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Things Liked Least – Top Mentions</b>								
Traffic/Bad Drivers	36.8%	44.8%	40.3%	23.7%	33.4%	40.2%	36.5%	30.6%
Humidity/Poor Weather	14.9%	13.9%	12.8%	18.4%	17.5%	9.7%	19.0%	28.3%
Road Construction	4.1%	4.0%	3.9%	4.3%	3.6%	3.8%	2.9%	4.4%
Expensive	3.0%	1.8%	6.7%	0.0%	5.2%	4.7%	5.1%	3.7%
Stay Was Too Short	2.2%	1.5%	3.3%	2.0%	3.5%	2.2%	1.1%	2.7%
Hotel (general)	2.2%	1.6%	2.7%	2.3%	3.4%	2.6%	3.0%	2.3%
Bad neighborhoods	1.7%	3.0%	1.8%	0.0%	0.7%	0.0%	0.6%	1.2%
Crowded	1.5%	1.7%	2.4%	0.0%	1.5%	4.0%	3.9%	1.7%
Unfriendly People	1.5%	2.0%	0.9%	1.7%	1.2%	0.5%	3.0%	1.1%
Lack of Directional Signs	0.9%	1.0%	0.9%	0.9%	1.2%	2.1%	0.5%	0.5%
Places keep air conditioning too low	0.7%	2.0%	0.0%	0.0%	0.9%	0.3%	0.0%	0.0%
Cost of Hotel	0.7%	1.0%	0.0%	1.1%	1.1%	3.8%	0.6%	0.2%
Parking	0.7%	0.0%	0.0%	2.2%	0.6%	0.5%	0.3%	0.3%
Other	15.0%	9.9%	14.6%	21.7%	15.5%	14.0%	14.3%	15.5%
Nothing liked least	14.1%	11.8%	9.7%	21.7%	10.7%	11.6%	9.2%	7.5%



## Hotel Survey: 4th Quarter 2006

Attitudes about Trip to Palm Beach County	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Suggestions for Improvement - Top Mentions*</b>								
Longer stay	15.6%	13.9%	19.9%	12.6%	17.2%	18.4%	21.2%	28.8%
Less business and more partying/more free time	13.2%	19.9%	10.5%	8.7%	4.5%	1.5%	9.3%	6.9%
Come during vacation time	12.5%	9.7%	14.6%	12.7%	7.8%	5.8%	6.3%	7.9%
Improve traffic/Finish Construction on I-95	9.4%	13.8%	12.7%	4.6%	9.1%	10.0%	11.3%	7.2%
Better weather	8.1%	6.0%	6.8%	12.3%	12.2%	18.0%	11.4%	11.8%
Come with friends/family	5.5%	4.4%	7.5%	4.6%	0.3%	3.7%	4.8%	3.6%
Better hotel	2.2%	2.1%	0.7%	4.0%	5.0%	4.6%	1.6%	3.6%
Cheaper hotel	1.2%	1.2%	2.3%	0.0%	0.0%	4.8%	1.7%	1.1%
Nothing	8.3%	6.3%	5.6%	14.1%	13.9%	9.3%	8.5%	6.5%
Other	24.8%	%	%	%	24.5%	22.1%	21.7%	17.6%

\*Multiple responses accepted.



## Hotel Survey: 4th Quarter 2006

Characteristics of Visitors	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b>Age</b>								
Under 35	19.4%	24.4%	16.2%	17.0%	16.4%	14.5%	18.5%	18.8%
35 to 54	52.9%	53.3%	53.9%	51.3%	53.4%	49.8%	57.3%	58.8%
55 to 64	22.0%	17.9%	23.8%	24.9%	23.4%	21.4%	18.2%	16.1%
65 +	5.7%	4.4%	6.0%	6.8%	6.8%	14.2%	6.0%	6.3%
<b>Occupation</b>								
Professional/Managerial	63.5%	65.2%	61.3%	64.0%	65.3%	60.7%	60.2%	63.1%
Sales	14.6%	15.4%	14.9%	13.4%	16.5%	12.4%	16.4%	16.1%
Technical	10.0%	8.6%	11.1%	10.2%	5.7%	5.2%	8.8%	8.1%
Retired	6.3%	4.8%	7.5%	6.6%	8.1%	15.9%	7.3%	7.6%
Student	0.8%	1.4%	0.9%	0.0%	0.8%	1.8%	1.3%	0.9%
Other	4.9%	4.7%	4.2%	5.7%	3.6%	4.0%	6.1%	4.1%
<b>Hispanic Origin</b>	5.0%	5.7%	3.9%	5.3%	5.5%	2.3%	6.7%	7.0%
<b>Ethnicity</b>								
White/Caucasian	90.5%	92.1%	89.6%	89.7%	93.1%	94.4%	91.8%	90.4%
African-American/Black	5.3%	3.4%	6.9%	5.7%	3.2%	3.1%	4.9%	5.7%
Asian	3.5%	3.7%	2.4%	4.6%	3.1%	2.6%	2.8%	3.8%
Other	0.7%	0.8%	1.1%	0.0%	0.6%	0.0%	0.6%	0.1%



## Hotel Survey: 4th Quarter 2006

Characteristics of Visitors (Continued)	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b><u>Income</u></b>								
Under \$45,000	4.3%	4.4%	4.2%	4.0%	3.2%	3.3%	3.3%	5.3%
\$45,000 to \$64,999	9.4%	8.2%	8.3%	11.5%	7.7%	7.9%	10.7%	11.9%
\$65,000 to \$99,999	21.2%	24.2%	21.5%	17.5%	22.0%	19.4%	21.3%	26.4%
\$100,000 to \$200,000	42.2%	43.6%	41.7%	42.2%	40.7%	40.0%	42.3%	41.3%
Over \$200,000	23.0%	19.6%	24.4%	24.9%	26.4%	29.4%	22.4%	15.1%
<b><u>Gender</u></b>								
Male	59.7%	55.4%	65.9%	57.9%	54.7%	58.2%	59.7%	60.6%
Female	40.3%	44.6%	34.1%	42.1%	45.3%	41.8%	40.3%	39.4%





## Hotel Survey: 4th Quarter 2006

Place of Origin	Total 4Q 2006	Oct.	Nov.	Dec.	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006
<b><u>Domestic</u></b>	<b>92.5%</b> (n=677)	<b>95.9%</b>	<b>93.4%</b>	<b>88.5%</b>	<b>88.7%</b> (n=648)	<b>92.2%</b> (n=680)	<b>90.8%</b> (n=671)	<b>91.9%</b> (n=673)
Florida	24.8% (n=182)	26.3%	28.0%	20.4%	14.5% (n=106)	12.3% (n=91)	18.1% (n=134)	26.7% (n=195)
Midwest	18.0% (n=131)	21.9%	15.5%	16.6%	15.2% (n=111)	17.3% (n=128)	14.3% (n=106)	14.2% (n=104)
Southeast	14.9% (n=109)	14.9%	18.8%	11.1%	18.3% (n=134)	17.3% (n=128)	18.3% (n=136)	20.1% (n=147)
Mid Atlantic	12.1% (n=89)	10.1%	9.3%	17.0%	14.2% (n=104)	16.8% (n=124)	12.6% (n=93)	11.2% (n=82)
New York	8.3% (n=61)	7.7%	6.7%	10.9%	12.6% (n=92)	15.0% (n=110)	11.9% (n=88)	7.0% (n=51)
Far West	7.7% (n=56)	6.5%	8.5%	7.9%	8.0% (n=58)	4.9% (n=36)	8.8% (n=65)	8.6% (n=63)
New England	6.6% (n=49)	8.5%	6.4%	4.7%	5.9% (n=43)	8.5% (n=63)	6.8% (n=50)	4.1% (n=30)
<b><u>International</u></b>	<b>7.5%</b> (n=55)	<b>4.1%</b>	<b>6.6%</b>	<b>11.5%</b>	<b>11.3%</b> (n=83)	<b>7.8%</b> (n=58)	<b>9.2%</b> (n=68)	<b>8.1%</b> (n=59)
Europe (net)	3.7% (n=27)	0.8%	4.8%	5.6%	6.8% (n=50)	3.8% (n=28)	4.5% (n=34)	3.8% (n=28)
- England/UK	1.9% (n=14)	0.0%	3.0%	2.8%	3.2% (n=23)	1.7% (n=13)	2.3% (n=17)	1.7% (n=12)
- Germany	0.5% (n=3)	0.0%	0.4%	0.9%	1.2% (n=9)	1.2% (n=9)	0.4% (n=3)	0.3% (n=2)
Latin America / Caribbean	1.8% (n=13)	1.6%	1.0%	2.7%	1.6% (n=12)	0.7% (n=5)	2.0% (n=15)	1.8% (n=13)
Canada	1.0% (n=7)	0.8%	0.3%	1.7%	1.9% (n=14)	2.7% (n=20)	1.6% (n=12)	1.9% (n=14)
Australia/Asia	0.7% (n=5)	0.5%	0.4%	1.1%	0.5% (n=4)	0.1% (n=1)	0.8% (n=6)	0.6% (n=4)
Middle East	0.3% (n=2)	0.5%	0.0%	0.3%	0.4% (n=3)	0.5% (n=4)	0.3% (n=2)	0.1% (n=1)
Africa	0.0% (n=0)	0.0%	0.0%	0.0%	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)



## Hotel Survey: 4th Quarter 2006

Pleasure Vs. Business By Selected Place of Origin	<u>Total</u> <u>4Q 2006</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	<u>Total</u> <u>4Q 2005</u>	<u>Total</u> <u>1Q 2006</u>	<u>Total</u> <u>2Q 2006</u>	<u>Total</u> <u>3Q 2006</u>
<b><u>Florida</u></b>	<b>24.8%</b>	<b>26.3%</b>	<b>28.0%</b>	<b>20.4%</b>	<b>14.5%</b>	<b>12.3%</b>	<b>18.1%</b>	<b>26.7%</b>
Business	20.0%	19.9%	25.3%	15.0%	9.4%	8.9%	13.9%	18.6%
Pleasure	4.8%	6.6%	2.8%	5.0%	4.9%	3.3%	4.1%	7.7%
<b><u>Midwest</u></b>	<b>18.0%</b>	<b>21.9%</b>	<b>15.5%</b>	<b>16.6%</b>	<b>15.2%</b>	<b>17.3%</b>	<b>14.3%</b>	<b>14.2%</b>
Business	13.7%	18.3%	13.3%	10.0%	7.3%	11.0%	9.2%	10.1%
Pleasure	4.2%	3.7%	2.4%	6.6%	7.6%	6.0%	5.1%	4.1%
<b><u>Southeast</u></b>	<b>14.9%</b>	<b>14.9%</b>	<b>18.8%</b>	<b>11.1%</b>	<b>18.3%</b>	<b>17.3%</b>	<b>18.3%</b>	<b>20.1%</b>
Business	12.2%	13.3%	14.9%	9.1%	13.4%	12.5%	14.6%	14.9%
Pleasure	2.6%	1.2%	4.0%	2.1%	4.8%	4.7%	3.7%	5.1%
<b><u>Mid Atlantic</u></b>	<b>12.1%</b>	<b>10.1%</b>	<b>9.3%</b>	<b>17.0%</b>	<b>14.2%</b>	<b>16.8%</b>	<b>12.6%</b>	<b>11.2%</b>
Business	8.1%	8.3%	6.0%	9.5%	6.3%	7.3%	5.8%	6.1%
Pleasure	3.7%	1.7%	3.2%	6.2%	7.9%	9.5%	6.6%	4.5%
<b><u>New York</u></b>	<b>8.3%</b>	<b>7.7%</b>	<b>6.7%</b>	<b>10.9%</b>	<b>12.6%</b>	<b>15.0%</b>	<b>11.9%</b>	<b>7.0%</b>
Business	4.4%	3.7%	4.8%	5.0%	4.3%	4.7%	4.2%	2.3%
Pleasure	3.8%	4.1%	2.0%	5.8%	8.1%	10.2%	7.7%	4.2%
<b><u>Far West</u></b>	<b>7.7%</b>	<b>6.5%</b>	<b>8.5%</b>	<b>7.9%</b>	<b>8.0%</b>	<b>4.9%</b>	<b>8.8%</b>	<b>8.6%</b>
Business	5.9%	5.4%	6.4%	5.8%	5.7%	3.9%	7.4%	6.7%
Pleasure	1.6%	0.8%	2.4%	1.7%	2.3%	0.9%	1.4%	1.5%
<b><u>New England</u></b>	<b>6.6%</b>	<b>8.5%</b>	<b>6.4%</b>	<b>4.7%</b>	<b>5.9%</b>	<b>8.5%</b>	<b>6.8%</b>	<b>4.1%</b>
Business	4.0%	4.5%	4.4%	2.5%	2.2%	3.8%	2.7%	2.9%
Pleasure	2.6%	4.1%	1.6%	2.1%	3.7%	4.7%	3.7%	1.0%