



**Report on Palm Beach County Tourism
Third Quarter 2006
(July, August and September)**

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Tourist Development Council of Palm Beach County

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November 7, 2006



Introduction: 3rd Quarter 2006

Background

- The following report contains information collected during the 3rd Quarter of 2006 (July, August and September 2006), the fourth quarter of Fiscal Year 2005/2006.
- 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 2006

Occupancy Rates

- **The average occupancy rate for Palm Beach County surveyed hotels during the third quarter of 2006 was 56.9%, a 6.1 percentage point decrease compared to the third quarter of 2005 (63.0%) and a 14.1 percentage point decrease compared to last quarter (71.0%).**
 - Both smaller (50-100 rooms) and larger (100+ rooms) properties saw decreases in the average occupancy rate compared to the same quarter last year (from 63.5% to 52.9% among smaller hotels, from 63.1% to 57.4% among larger hotels) and last quarter (from 69.3% among smaller hotels and from 71.3% among larger hotels).
 - The occupancy rate in 3Q2006 was highest in July among both smaller and larger properties (62.4% among smaller hotels and 62.1% among larger hotels).
- **Hotels in the Central region of Palm Beach County reported higher occupancy rates (61.1%) than hotels in the Southern (53.5%) and Northern (55.7%) regions during 3Q2006.**
 - Hotels from all three regions reported decreases in occupancy rates compared to 3Q2005 and last quarter.
 - The largest decrease in occupancy rates, compared to 3Q2005, occurred among hotels in the Central Region (from 68.2% to 61.1%, a 7.1 percentage point decrease).
 - Compared to the previous quarter, hotels in the Northern and Southern regions saw decreases in the average occupancy rate of 17.4 and 17.0 percentage points, respectively (from 73.1% to 55.7%, Northern Region and from 70.5% to 53.5%, Southern Region). Hotels in the Central region reported a 9.5 percentage point decrease compared to 2Q2006 (from 70.6% to 61.1%).
- **An estimated 769,629 Palm Beach County hotel room nights were occupied* in the third quarter of 2006 – a decrease of 92,406 room nights compared to 3Q2005 (862,035) and a decrease of 195,163 room nights compared to the previous quarter (964,792).**
- **The average percentage of international guests staying at Palm Beach County hotels (2.8%) decreased compared to 3Q2005 (5.1%) but did not change compared to last quarter (2.8%).**
 - Based on the hotel managers who responded, smaller hotels (50-100 rooms) reported that 2.5% of their guests were from abroad, while larger properties (101 + rooms) reported that 2.7% of hotel guests were from foreign countries.
 - Among larger properties, the percentage of international guests was higher among properties with 101-219 rooms (3.2%) than among properties with 220-500 rooms (0.7%).
 - As seen in previous quarters, properties in the Southern region continued to report the highest percentage of international guests (4.3%), Northern the fewest (1.2%).
- **In the third quarter of 2006, participating property managers reported that 39.8% of hotel guests were leisure travelers, 35.3% were business travelers and 24.9% were convention/group travelers.**
- **Conference/convention bookings represented 30.4% of occupied room nights at designated convention hotels. This is about the same as in 3Q2005 (30.9%) and represents a decrease of 5.7 percentage points compared to last quarter (36.1%).**

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



Property Manager Survey: 3rd Quarter 2006

Average Daily Room Rate (ADR)

- **In 3Q2006, the ADR reported by participating Palm Beach County property managers was \$104.60 – this represents a 2.9% (\$3.16) decrease compared to the same quarter last year (\$107.76) and a 26.8% (\$38.36) decrease compared to the previous quarter (\$142.96).**
 - Smaller properties (50-100 rooms) reported an ADR of \$94.91, while larger properties (101+ rooms) reported an ADR of \$106.04 in 3Q2006.
 - Both smaller and larger properties reported decreases in ADR compared to 3Q2005 and 2Q2006. Smaller properties (50-100 rooms) reported a 7.9% (\$8.11) decrease in ADR compared 3Q2005 (\$103.02) and a 19.0% (\$22.31) decrease compared to last quarter (\$117.22). Larger properties reported a 2.6% (\$2.81) decrease compared to 3Q2005 (\$108.85) and a 27.9% (\$40.95) decrease compared to last quarter (\$146.99).

Future Business Outlook

- **Just over one-half of surveyed property managers predicted a decrease in room revenue compared to the same period last year (53.1%). About one-third expected an increase (32.0%) and only 14.9% anticipated no change.**
 - Among hotel managers who predicted an increase in room revenue compared to the previous year, the average increase expected was 11.2%.
 - Among hotel managers expecting a decrease in room revenue compared to the previous year, the average decrease expected was 11.9%.

Bookings Via Third Party Websites

- **According to surveyed hotel managers, during 3Q2006, 15.9% of bookings were sold through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc). This represents a 2.7 percentage point increase compared to the third quarter of 2005 (12.9%) and a 2.1 percentage point increase compared to the prior quarter (13.5%).**
 - Smaller properties (50-100 rooms) reported a higher percentage of bookings sold via third party websites (20.7%) than larger properties (101+ rooms) (12.9%).



Hotel Visitor Survey: 3rd Quarter 2006

Characteristics of Stay

- In 3Q2006, the average party size of surveyed hotel guests was 2.0*; comparable to the average party size in 3Q2005 and last quarter (2.2 each). The median party size for 3Q2006 and for all months within the quarter was 2.0.
- On average, surveyed hotel guests stayed 3.2 nights in a Palm Beach County hotel (down from 3.9 nights one year ago) and occupied 1.3 rooms per night*.
- In 3Q2006, most Palm Beach County hotel guests described themselves as business travelers (65.8%) (conference/convention/business meeting), typically citing business meetings as the main reason for their visit (59.1%). Leisure travelers represented 24.9% of surveyed visitors.
 - The percentage of business travelers increased throughout the quarter from 58.3% in July to 67.5% in August to 71.1% in September, while the percentage of leisure travelers decreased from 29.3% in July to 25.3% in August to 20.7% in September.
 - Compared to the same time last year, the percentage of vacationers decreased from 40.5% to 24.9% (down 15.6 percentage points), while the percentage of business travelers increased from 51.8% to 65.8% (up 14.0 percentage points).
 - The percentage of vacationers also decreased compared to last quarter by 6.6 percentage points (from 31.5% to 24.9%), while the percentage of business travelers had a small increase of 2.5 percentage points (from 63.3% to 65.8%).

Planning the Trip to Palm Beach County

- When asked why they selected PBC over other destinations, most surveyed visitors stated that it was due to a work related trip (62.8%). Visitors also frequently cited 'visit friends/relatives' (17.4%) and 'previous visit' (11.1%).
 - The percentage of those who mentioned 'work related trip' increased by 10.7 percentage points compared to 3Q2005 (52.1%) but was comparable to last quarter (61.6%).
- **Seven-in-ten surveyed guests planned their trip to Palm Beach County only one month or less in advance (70.0%, a 13.3 percentage point increase compared to 3Q2005 and a 13.4 percentage point increase compared to 2Q2006).**
- More than three-in-five hotel guests reported that an employer made the decision regarding the trip to PBC in 3Q2006 (61.6%). This represents a 15.3 percentage point increase compared to 3Q2005 (46.3%) and is comparable to last quarter (62.7%).

Booking a Trip to Palm Beach County

- **Similar to 3Q2005 (24.6%) and 2Q2006 (25.6%), one-quarter of surveyed visitors reported using a Travel Agent to book part of their trip to PBC in 3Q2006 (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: 3rd Quarter 2006

Booking a Trip to Palm Beach County (Continued)

- **Use of the Internet as a trip planning tool among surveyed visitors (48.6% claimed to have done so) was comparable with the same quarter last year (47.0%) and increased slightly compared to last quarter (2.6 percentage point increase, from 46.0% to 48.6%).**
 - Hotel guests who used the Internet to book part of their trip to PBC most often used it to book hotel accommodations (71.5%), airfare (64.7%) and/or to reserve a rental car (42.1%).
 - Visitors to PBC who booked hotel rooms online continued to do so, most frequently, by using hotel websites directly (35.4%).
 - The percentage of visitors who claimed that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meal, rental car, etc) (5.7%) declined by 6.7 percentage points compared to 3Q2005 (12.4%) and by 4.4 percentage points compared to 2Q2006 (10.1%).
 - Seven-in-ten surveyed visitors traveled by air to come to PBC during the third quarter of 2006 (70.7%). This is comparable with the same quarter last year (69.1%) and is 9.4 percentage points lower than in the last quarter (80.1%).

Visitor Expenditures

- **While visiting Palm Beach County, surveyed visitors spent an average of \$1,050 per party*, which represents an 18.4% (\$237) decrease compared to the third quarter of last year (\$1,287) and a 27.8% (\$405) decrease compared to last quarter (\$1,455).**
 - In 3Q2006, all spending categories experienced decreases compared to the same quarter last year.
 - With the exception of Entertainment/Recreation expenditures (increased 22.6%), all other spending categories decreased compared to last quarter.
 - The average per person expenditure in 3Q2006 (\$525) was lower than in the same quarter last year (\$585) and the previous quarter (\$661).
- **In 3Q2006, vacation/pleasure visitors continued to spend more (\$1,463) in Palm Beach County than business visitors (\$887) – a difference of \$576.**
 - Vacationers' per party expenditures in 3Q2006 decreased by 3.0% compared to 3Q2005 (\$1,508) and by 26.6% compared to last quarter (\$1,993).
 - Business travelers' per party expenditures decreased by 20.1% compared to 3Q2005 (\$1,110) and by 24.1% compared to last quarter (\$1,169).

Characteristics of Visit

- **First time visitors to Palm Beach County represented 26.7% of surveyed hotels guests in 3Q2006. This is at parity with the third quarter of 2005 (27.8%) and is about the same as last quarter (26.9%).**
- 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 2006

Characteristics of Visit (Continued)

- **More than eight-in-ten surveyed hotel guests stated that they plan to return to Palm Beach County (83.9%). This is at parity with the same quarter last year and the previous quarter (82.0% each).**
 - The vast majority of surveyed visitors who plan to return to Palm Beach County plan to do so in the next year (70.4%); 42.2% within the next three months.
 - Visitors who have no plans to return to PBC (only 2.3%) most often mentioned 'no business in the area' (25.1%) as the reason for not coming back.
- Rising costs of transportation, due to rising fuel costs would not affect the decision to come to Palm Beach County for more than one-half of surveyed visitors (53.2% rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). This represents a decrease of 5.3 percentage points compared to last quarter (58.5%).
- Generally increasing travel costs also would not have any impact on the decision to come to PBC for 52.0% of surveyed guests (rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). Only about one-in-ten reported that they would consider changing their plans (11.5% rated 4 or 5).
- **Eating at area restaurants was the most popular activity enjoyed by surveyed guests while visiting Palm Beach County in 3Q2006 (enjoyed by 92.5% of surveyed guests).**
 - 3Q2006 surveyed visitors also frequently mentioned going shopping (28.3%), going to the beach (24.1%), and swimming (13.6%).

Attitudes toward Palm Beach County

- **In 3Q06, surveyed visitors to PBC continued to report that the aspects of their trip to PBC they liked best were 'climate/weather' (25.3%), 'beaches' (18.7%) and 'beautiful area' (8.5%).**
- **When asked what they liked least about the trip to PBC, 3Q2006 surveyed visitors most often cited 'traffic/bad drivers' (30.6%) and 'Humidity/poor weather' (28.3%), as seen in previous quarters.**
- According to 3Q2006 surveyed guests, a 'longer stay' (28.8%), 'better weather' (11.8%) and 'come during vacation time' (7.9%) would make the next trip to Palm Beach County better.

Characteristics of Visitors

- The vast majority of surveyed hotels guests were White/Caucasian (90.4%).
- Six-in-ten (63.1%) claimed to have professional/managerial occupations (a 9.7 percentage point increase compared to 3Q2005, 53.4%).
- More than one-half (56.4%) claimed to have an annual household income of \$100,000 or greater.
- Most often, visitors were traveling alone (40.1%), or secondarily, with adult family members or friends (33.7%). One-quarter reported traveling with business associates (24.6%).
- Domestic travelers comprised 91.9% of surveyed hotel guests.



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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 2006

	<u>Total 3Q 2006</u>	<u>July</u>	<u>August</u>	<u>Sept.</u>	<u>Total 3Q 2005</u>	<u>Total 4Q 2005</u>	<u>Total 1Q 2006</u>	<u>Total 2Q 2006</u>
Occupancy Rate								
Month/Quarter	56.9%	62.1%	57.0%	51.2%	63.0%	73.1%	84.7%	71.0%
FYTD (Oct. - Set.)	71.2%	74.6%	73.0%	71.2%	76.0%	72.4%	78.4%	76.0%
Room Nights Occupied^{1*}								
Month/Quarter	769,629	287,148	258,547	223,934	862,035+	956,948+	1,138,435	964,792
FYTD (Oct. - Set.)	3,829,804	3,347,323	3,605,870	3,829,804	4,057,276+	956,948+	2,095,383	3,060,175
Percentage of Room Nights Occupied								
Leisure	39.8%	43.3%	36.6%	39.2%	36.2%	35.4%	40.4%	37.5%
Business	35.3%	31.0%	39.0%	36.6%	37.8%	34.7%	34.5%	32.0%
Convention/Group	24.9%	25.7%	24.4%	24.2%	26.0%	30.0%	25.2%	30.5%
Average Daily Room Rate²	\$104.60	\$107.91	\$100.37	\$104.98	\$107.76	\$137.81	\$204.12	\$142.96

+ 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: 3rd Quarter 2006

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>98/99</u>	<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>
3rd Quarter (July/August/Sept.)	N/A	N/A	N/A	57.3	57.8	64.2	63.0	56.9
July	62.8	63.5	61.6	60.0	60.8	66.9	64.6	62.1
August	59.9	61.2	60.8	59.7	60.5	63.7	62.0	57.0
September	50.8	57.2	43.1	52.0	51.9	61.5	62.9	51.2
4th Quarter (Oct/Nov/Dec)	N/A	N/A	N/A	57.5	59.8	64.2	79.8	73.1
1st Quarter (Jan/Feb/Mar)	N/A	N/A	N/A	76.2	77.9	83.8	88.3	84.7
2nd Quarter (April/May/June)	N/A	N/A	N/A	65.1	67.0	71.8	72.7	71.0
Fiscal YTD (Oct. – Sept.)	66.7	68.8	67.3	64.1	65.7	70.9	76.0	71.2
Number of Room Nights Occupied in 3rd Quarter*							862,035+	769,629

+ 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: 3rd Quarter 2006

	<u>Total 3Q 2006</u>	<u>July</u>	<u>August</u>	<u>Sept.</u>	<u>Total 3Q 2005</u>	<u>Total 4Q 2005</u>	<u>Total 1Q 2006</u>	<u>Total 2Q 2006</u>
Conference/Convention Bookings								
<u>All Hotels</u>								
% Occupied Room Nights in County	24.9%	25.7%	24.4%	24.2%	26.0%	30.0%	25.2%	30.5%
Occupied Room Nights in County	191,074	73,797	63,085	54,192	243,936	302,473	291,689	299,502
Occupied Room Nights in County FYTD (Oct.- Sept.)	1,084,738	967,461	1,030,546	1,084,738	1,133,287	302,473	594,162	893,664
<u>Convention Hotels</u>								
% Occupied Room Nights	30.4%	31.5%	28.6%	31.0%	30.9%	35.4%	30.5%	36.1%
Occupied Room Nights	138,862	52,996	43,552	42,314	134,005	157,068	213,289	213,971
Occupied Room Nights FYTD (Oct.- Sept.)	723,190	637,324	680,876	723,190	670,000	157,068	370,357	584,328
Available Inventory*								
Rooms in County	44,014	14,916**	14,632**	14,466**	44,499+	43,083+	45,020	44,737
Room Nights	1,349,968	462,396	453,592	433,980	1,364,636+	1,321,198+	1,350,518	1,357,026
Room Nights FYTD (Oct.- Sept.)	5,378,710	4,491,138	4,944,730	5,378,710	5,352,902+	1,321,198+	2,671,716	4,028,742
Response Rate								
Month/Quarter (for all hotels in County)	61.5%	60.9%	62.5%	61.1%	62.9%	55.1%	59.7%	60.0%
FYTD (Oct.- Sept.)	59.1%	58.6%	58.9%	59.1%	65.1%	55.1%	57.4%	58.3%

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

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

** Number of rooms used for research purposes/data projections; actual total number of rooms available in Palm Beach County is 18,375.



Property Manager Survey: 3rd Quarter 2006

Occupancy Rate	Total 3Q 2006	July	August	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Size of Hotel								
50 - 100 Rooms	52.9%	62.4%	50.2%	45.7%	63.5%	75.7%	88.1%	69.3%
101 + Rooms	57.4%	62.1%	57.8%	52.4%	63.1%	72.6%	84.1%	71.3%
101-219	58.1%	63.4%	58.3%	52.7%	66.0%	75.7%	84.5%	68.2%
220-500	57.9%	60.9%	59.3%	52.9%	58.6%	70.1%	82.4%	76.9%
All Properties	56.9%	62.1%	57.0%	51.6%	63.0%	73.1%	84.7%	71.0%
Geographic Region								
North	55.7%	64.0%	57.2%	46.1%	61.3%	73.8%	83.4%	73.1%
Central	61.1%	67.5%	61.7%	54.4%	68.2%	74.3%	84.5%	70.6%
South	53.5%	56.6%	51.9%	51.8%	58.7%	71.5%	85.6%	70.5%

What percent of your occupancy is international?	Total 3Q 2006	July	August	Sept.	Total 3Q 2005 Aug/Sep	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Size of Hotel								
50-100 Rooms	2.5%	2.7%	3.7%	*	6.8%	1.9%	11.5%	3.6%
101 + Rooms	2.7%	2.6%	2.8%	2.4%	4.7%	2.6%	3.1%	2.6%
101-219	3.2%	2.8%	3.4%	3.5%	8.1%	3.4%	4.0%	2.8%
220-500	0.7%	1.5%	0.7%	0.4%	0.5%	0.8%	1.5%	1.2%
All Properties	2.8%	2.6%	3.0%	2.7%	5.1%	2.7%	4.5%	2.8%
Geographic Region								
North	1.2%	1.3%	1.0%	1.2%	2.4%	1.4%	1.4%	1.2%
Central	2.3%	2.5%	1.9%	2.5 %	3.2%	2.2%	5.2%	2.6%
South	4.3%	3.2%	6.2%	3.2%	8.0%	3.8%	5.7%	3.9%



Property Manager Survey: 3rd Quarter 2006

Average Daily Room Rate	Total 3Q 2006	July	August	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Size of Hotel								
<u>50 - 100 Rooms</u>	\$94.91	\$101.72	\$88.89	\$92.40	\$103.02	\$119.38	\$164.79	\$117.22
<u>101 + Rooms</u>	\$106.04	\$108.94	\$101.85	\$106.81	\$108.85	\$141.57	\$211.07	\$146.99
101-219	\$85.25	\$86.81	\$83.14	\$85.89	\$91.61	\$109.19	\$154.43	\$101.80
220-500	\$109.37	\$119.23	\$100.35	\$106.55	\$107.56	\$147.65	\$220.64	\$159.02
<u>All Properties</u>	\$104.60	\$107.91	\$100.37	\$104.98	\$107.76	\$137.81	\$204.12	\$142.96



Property Manager Survey: 3rd Quarter 2006

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
3Q		
2004	859,630	
2005	862,035+	0.3
2006	769,629	- 10.7
July		
2004	318,924	
2005	297,046+	- 6.9
2006	287,148	- 3.3
August		
2004	303,689	
2005	285,090	- 6.1
2006	258,547	- 9.3
September		
2004	237,017+	
2005	279,899+	18.1
2006	223,934	- 20.0
4Q		
2004	1,052,362+	
2005	956,948+	- 9.1
2006		
1Q		
2004	1,186,693	
2005	1,173,859+	- 1.1
2006	1,138,435	- 3.0
2Q		
2004	1,022,634	
2005	969,020+	- 5.2
2006	964,792	- 0.4
FYTD (October – September)		
2004	4,003,012	7.0
2005	4,057,276	1.4
2006	3,829,804	- 5.6

+ 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: 3rd 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>
August 2006 / September 2006 predictions from July			
Foresee Decrease	48.0%	59.5%	56.0%
Average decrease (among those who foresee decrease)	13.0%	20.5%	12.1%
Foresee No Change	10.6%	16.8%	21.7%
Foresee Increase	41.5%	23.7%	22.3%
Average increase (among those who foresee increase)	9.6%	13.4%	10.8%
September 2006 / October 2006 predictions from August			
Foresee Decrease	51.5%	43.6%	40.2%
Average decrease (among those who foresee decrease)	11.7%	15.2%	13.2%
Foresee No Change	18.9%	21.0%	36.1%
Foresee Increase	29.5%	35.3%	23.8%
Average increase (among those who foresee increase)	11.5%	9.2%	8.2%
October 2006 / November 2006 predictions from September			
Foresee Decrease	60.4%	46.3%	38.8%
Average decrease (among those who foresee decrease)	11.2%	12.1%	9.3%
Foresee No Change	14.4%	24.4%	28.8%
Foresee Increase	25.2%	29.2%	32.4%
Average increase (among those who foresee increase)	13.8%	14.3%	9.3%
Third Quarter predictions from July, August and September			
Foresee Decrease	53.1%	49.2%	44.5%
Average decrease (among those who foresee decrease)	11.9%	16.2%	11.7%
Foresee No Change	14.9%	20.9%	29.4%
Foresee Increase	32.0%	29.9%	26.1%
Average increase (among those who foresee increase)	11.2%	11.9%	9.3%



Property Manager Survey: 3rd Quarter 2006

Bookings via third party website	Total 3Q 2006	July	August	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Size of Hotel								
<u>50 - 100 Rooms</u>	20.7%	9.7%	32.0%	20.2%	17.1%	14.3%	15.9%	12.4%
<u>101 + Rooms</u>	12.9%	9.0%	13.1%	16.5%	11.2%	8.0%	8.7%	12.6%
101-219	13.9%	9.2%	14.3%	18.2%	11.2%	9.1%	9.7%	14.9%
220-500	9.6%	9.3%	9.6%	10.0%	13.2%	2.6%	5.3%	4.9%
<u>All Properties</u>	15.6%	10.0%	18.3%	18.0%	12.9%	10.6%	11.1%	13.5%



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: 3rd Quarter 2006

Characteristics of Stay	Total <u>3Q</u> <u>2006</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	Total <u>3Q</u> <u>2005</u>	Total <u>4Q</u> <u>2005</u>	Total <u>1Q</u> <u>2006</u>	Total <u>2Q</u> <u>2006</u>
Average Party Size *	2.0	2.2	2.0	1.8	2.2	2.1	2.1	2.2
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.3	3.8	3.3	2.7	4.0	3.7	4.7	3.6
Nights in Hotel	3.2	3.7	3.2	2.6	3.9	3.4	4.4	3.4
Rooms per Night *	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.4

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



Hotel Survey: 3rd Quarter 2006

Visitor Expenditures	Total 3Q 2006	July	Aug.	Sept.+	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Average Expenditure Per Visit								
Lodging	\$554	\$659	\$544	\$442	\$566	\$823	\$1,461	\$826
Restaurant/Bar	\$243	\$263	\$250	\$208	\$347	\$296	\$519	\$323
Gifts/Shopping	\$93	\$174	\$83	\$49	\$125	\$153	\$158	\$133
Entertainment/Recreation	\$38	\$26	\$64	\$21	\$86	\$48	\$106	\$31
Local Travel	\$122	\$133	\$106	\$114	\$164	\$139	\$207	\$143
Total Per Party	\$1,050	\$1,254	\$1,046	\$835	\$1,287	\$1,459	\$2,451	\$1,455
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$525	\$570	\$523	\$464	\$585	\$695	\$1,167	\$661
Total Per Person/Per Day	\$164	\$154	\$164	\$178	\$150	\$204	\$265	\$195
Lodging	\$87	\$81	\$85	\$94	\$66	\$115	\$158	\$110
Restaurant/Bar	\$38	\$32	\$39	\$44	\$40	\$41	\$56	\$43
Gifts/Shopping	\$15	\$21	\$13	\$11	\$15	\$21	\$17	\$18
Entertainment/Recreation	\$6	\$3	\$10	\$4	\$10	\$7	\$11	\$4
Local Travel	\$19	\$16	\$17	\$24	\$19	\$20	\$22	\$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 may not be directly comparable to prior year due to availability of specific hotels at which interviewing was conducted.



Hotel Survey: 3rd Quarter 2006

Visitor Expenditures	Pleasure							
	Total 3Q 2006	July	Aug.	Sept.+	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Average Expenditure Per Visit								
Lodging	\$675	\$701	\$720	\$515	\$596	\$821	\$2,040	\$1,051
Restaurant/Bar	\$328	\$336	\$336	\$273	\$420	\$292	\$588	\$449
Gifts/Shopping	\$234	\$426	\$148	\$121	\$192	\$277	\$294	\$269
Entertainment/Recreation	\$101	\$33	\$240	\$12	\$136	\$68	\$126	\$66
Local Travel	\$125	\$115	\$128	\$112	\$164	\$140	\$270	\$152
Total Per Party	\$1,463	\$1,611	\$1,572	\$1,032	\$1,508	\$1,598	\$3,318	\$1,993
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$542	\$556	\$582	\$430	\$559	\$615	\$1,383	\$687
Total Per Person/Per Day	\$139	\$136	\$146	\$139	\$140	\$171	\$230	\$176
Lodging	\$64	\$59	\$67	\$69	\$55	\$88	\$142	\$93
Restaurant/Bar	\$31	\$28	\$31	\$37	\$39	\$31	\$41	\$40
Gifts/Shopping	\$22	\$36	\$14	\$16	\$18	\$30	\$20	\$24
Entertainment/Recreation	\$10	\$3	\$22	\$2	\$13	\$7	\$9	\$6
Local Travel	\$12	\$10	\$12	\$15	\$15	\$15	\$19	\$13

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



Hotel Survey: 3rd Quarter 2006

Visitor Expenditures	Business							
	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Average Expenditure Per Visit								
Lodging	\$502	\$622	\$481	\$393	\$536	\$828	\$1,030	\$704
Restaurant/Bar	\$209	\$218	\$215	\$177	\$293	\$304	\$414	\$257
Gifts/Shopping	\$41	\$41	\$55	\$25	\$68	\$63	\$79	\$65
Entertainment/Recreation	\$17	\$20	\$9	\$21	\$46	\$30	\$82	\$12
Local Travel	\$119	\$139	\$99	\$108	\$167	\$142	\$154	\$130
Total Per Party	\$887	\$1,040	\$858	\$725	\$1,110	\$1,366	\$1,758	\$1,169
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$555	\$650	\$537	\$483	\$653	\$804	\$1,005	\$687
Total Per Person/Per Day	\$191	\$191	\$185	\$210	\$172	\$244	\$320	\$222
Lodging	\$108	\$114	\$104	\$114	\$83	\$148	\$187	\$134
Restaurant/Bar	\$45	\$40	\$46	\$51	\$45	\$54	\$75	\$49
Gifts/Shopping	\$9	\$8	\$12	\$7	\$11	\$11	\$14	\$12
Entertainment/Recreation	\$4	\$4	\$2	\$6	\$7	\$5	\$15	\$2
Local Travel	\$26	\$26	\$21	\$31	\$26	\$25	\$28	\$25

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



Hotel Survey: 3rd Quarter 2006

Planning the Trip to Palm Beach County	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Reason for Trip								
Conference/Convention/ Business Meeting	65.8%	58.3%	67.5%	71.1%	51.8%	54.8%	55.4%	63.3%
- Business Meeting	59.1%	51.7%	59.0%	66.3%	46.1%	47.9%	47.5%	54.0%
- Conference/Convention	4.8%	2.7%	7.7%	4.1%	5.4%	5.1%	6.9%	7.3%
- Other Business	1.8%	3.8%	0.8%	0.7%	0.3%	1.8%	1.1%	2.0%
Vacation/Pleasure	24.9%	29.3%	25.3%	20.7%	40.5%	37.5%	36.3%	31.5%
Sporting Event	2.4%	6.9%	0.0%	0.4%	0.9%	3.1%	5.2%	1.8%
Cultural Event/Attraction	0.7%	0.0%	0.7%	1.7%	0.5%	0.3%	0.0%	0.5%
Film/TV location scouting/production	0.1%	0.0%	0.0%	0.3%	0.0%	0.1%	0.0%	0.0%
Other	6.0%	5.4%	6.4%	5.7%	6.3%	4.1%	2.1%	2.8%
Who Made the Decision*								
Employer	61.6%	52.5%	66.0%	65.9%	46.3%	53.3%	54.9%	62.7%
Head of Household/ Other adult	32.7%	42.4%	26.2%	29.7%	51.7%	38.9%	41.1%	31.8%
Family Living in PBC	5.7%	4.0%	6.9%	6.4%	N/A	8.1%	4.9%	5.8%
Children Influenced Decision	1.4%	2.0%	2.1%	0.0%	2.0%	2.1%	1.8%	1.1%
Advanced Planning								
One Month or Less	70.0%	63.8%	69.4%	76.0%	56.7%	50.5%	50.6%	56.6%
2 to 3 Months	16.6%	16.3%	18.2%	15.5%	20.9%	26.1%	24.3%	24.8%
More than 3 Months	13.5%	19.9%	12.4%	8.5%	22.4%	23.4%	25.1%	18.5%

* Multiple responses accepted.



Hotel Survey: 3rd Quarter 2006

Planning the Trip to Palm Beach County (Continued)	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	62.8%	56.0%	63.9%	67.7%	52.1%	53.4%	55.9%	61.6%
Visit Friends/Relatives	17.4%	17.1%	18.8%	16.8%	24.1%	25.2%	21.1%	19.1%
Previous Visit	11.1%	5.5%	15.5%	11.8%	13.7%	9.1%	10.9%	8.6%
Convenient Flights	5.8%	5.0%	7.9%	4.5%	4.7%	9.3%	7.4%	7.1%
Special Event	3.9%	7.6%	1.4%	3.4%	11.1%	6.5%	4.4%	6.9%
Weather	3.2%	3.1%	3.6%	3.0%	5.7%	7.5%	9.8%	8.6%
Beaches	3.0%	2.7%	4.8%	1.5%	7.5%	4.0%	4.2%	6.5%
Friends/Relatives recommendation	2.3%	3.2%	1.3%	2.5%	17.3%	2.9%	3.5%	4.1%
Golf/Tennis/Recreation	1.7%	3.8%	0.9%	0.7%	4.3%	2.8%	5.5%	3.0%
Attend Sporting Event	1.6%	3.9%	0.0%	0.8%	1.0%	2.1%	2.7%	0.9%
Art/Cultural Event	1.2%	0.9%	1.3%	1.5%	1.2%	0.3%	1.3%	1.0%
Other Internet Sources	0.6%	0.7%	0.4%	0.7%	7.3%	1.0%	0.7%	0.5%
Hotel Brochure/Website	0.4%	0.5%	0.7%	0.0%	4.6%	1.4%	0.6%	1.5%
Attraction Brochure/Website	0.4%	0.3%	0.5%	0.4%	1.1%	0.6%	0.5%	0.8%
Bus Tour	0.2%	0.0%	0.0%	0.5%	N/A	0.5%	0.1%	0.1%
Compete in Sporting Event	0.1%	0.0%	0.0%	0.4%	0.4%	1.5%	0.4%	0.7%
Travel Agency	0.1%	0.0%	0.0%	0.4%	1.4%	0.0%	0.6%	0.3%
PBC-CVB Information/Website	0.1%	0.5%	0.0%	0.0%	1.2%	0.1%	0.1%	0.1%
County/State Tourist Agency	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	N/A	0.4%	0.0%	0.0%
Media Coverage	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.1%	0.2%
Spring Training	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.6%	0.4%
Other	4.8%	5.4%	4.7%	4.1%	12.0%	5.7%	5.1%	3.3%

* Multiple responses accepted.



Hotel Survey: 3rd Quarter 2006

Planning the Trip to Palm Beach County (Continued)	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Booked Trip with Travel Agency								
Yes	24.7%	17.0%	26.9%	29.7%	24.6%	21.4%	26.1%	25.6%
No	75.3%	83.0%	73.1%	70.3%	75.4%	78.6%	73.9%	74.4%
Booked Any Part of Trip Using Internet								
Yes	48.6%	46.5%	48.3%	51.7%	47.0%	52.5%	44.1%	46.0%
No	51.4%	53.5%	51.7%	48.3%	53.0%	47.5%	55.9%	54.0%
Booked Any Part of Trip Using Internet* (among those who used the Internet)								
Hotel	71.5%	66.6%	73.6%	74.3%	65.6%	54.6%	55.2%	61.3%
Hotel website	35.4%	32.1%	33.4%	39.5%	31.5%	28.7%	31.8%	27.6%
Travelocity	4.8%	7.3%	5.2%	2.3%	2.4%	1.5%	1.0%	3.9%
hotels.com	2.2%	0.8%	4.0%	2.0%	2.9%	1.8%	1.2%	1.3%
Expedia	1.9%	0.7%	1.6%	3.1%	7.1%	4.0%	2.6%	4.2%
Orbitz	0.5%	0.0%	1.6%	0.0%	2.7%	1.8%	2.0%	2.1%
Hotwire	0.4%	0.0%	0.0%	1.3%	0.0%	0.3%	0.3%	0.3%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	N/A	0.0%	0.0%	0.3%
Other Website	6.3%	7.0%	6.9%	5.2%	5.1%	3.8%	4.5%	4.5%
Don't Remember	20.0%	18.6%	20.9%	20.9%	14.0%	12.5%	11.7%	17.1%
Air	64.7%	74.7%	58.2%	61.7%	72.7%	78.3%	79.2%	74.2%
Car Rental	42.1%	42.5%	36.3%	47.2%	43.7%	43.2%	38.7%	40.3%
Tickets to Event	1.7%	1.0%	0.6%	4.1%	1.2%	0.7%	2.0%	1.0%
Other	4.5%	4.4%	3.6%	5.4%	2.7%	4.6%	3.6%	5.6%
Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)								
Yes	5.7%	6.0%	8.6%	3.1%	12.4%	11.7%	10.3%	10.1%
No	94.3%	94.0%	91.4%	96.9%	87.6%	88.3%	89.7%	89.9%
Type of Transportation**								
Airplane	70.7%	68.5%	70.7%	72.5%	69.1%	83.5%	81.8%	80.1%
Car	33.1%	38.0%	31.1%	30.6%	30.7%	23.8%	23.9%	24.2%
Other	0.6%	0.0%	1.4%	0.9%	0.2%	1.0%	0.8%	1.1%

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



Hotel Survey: 3rd Quarter 2006

Characteristics of the Visit	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Plan to Return to PBC								
Yes	83.9%	83.0%	82.2%	86.2%	82.0%	80.8%	78.1%	82.0%
No	2.3%	4.2%	1.6%	1.2%	3.5%	3.5%	3.2%	3.1%
Don't know	13.8%	12.8%	16.1%	12.7%	14.5%	15.6%	18.7%	14.9%
<u>If no, why not?</u>	n = 17	n = 10**	n = 4**	n = 3**				n = 21
No business in the area	25.1%	2	1	2	N/A	N/A	N/A	23.3%
Job hunting	7.3%	0	1	0	N/A	N/A	N/A	0.0%
Probate office people are rude	7.3%	1	0	0	N/A	N/A	N/A	0.0%
Did not like Singer Island	6.6%	1	0	0	N/A	N/A	N/A	0.0%
Too expensive	6.6%	1	0	0	N/A	N/A	N/A	0.0%
No fun	6.5%	0	1	0	N/A	N/A	N/A	0.0%
No interest	5.0%	1	0	0	N/A	N/A	N/A	0.0%
Prefer other destinations	4.3%	1	0	0	N/A	N/A	N/A	0.0%
Family moving away	0.0%	0	0	0	N/A	N/A	N/A	4.8%
Had unpleasant business experience	0.0%	0	0	0	N/A	N/A	N/A	4.8%
Going to other places/I like changing destinations	0.0%	0	0	0	N/A	N/A	N/A	24.1%
No reason/No answer	31.3%	3	1	1	N/A	N/A	N/A	42.9%
When do you plan on returning to PBC?								
Within the next 3 months	42.2%	36.2%	38.3%	51.2%	31.8%	34.7%	26.2%	30.4%
Within the next 6 months	12.0%	10.8%	14.3%	11.2%	13.8%	9.5%	8.1%	12.2%
Within the next year	16.2%	20.5%	14.7%	13.9%	23.5%	18.2%	30.4%	22.3%
Within the next few years	4.2%	6.1%	4.5%	2.3%	9.6%	5.9%	10.1%	7.1%
Don't Know	25.4%	26.3%	28.2%	21.4%	21.3%	31.7%	25.3%	27.9%

•Multiple responses accepted.

** Raw numbers shown due to low base size



Hotel Survey: 3rd Quarter 2006

Characteristics of the Visit	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
<u>Influence of fuel cost</u>								
5 – Strong consideration	5.5%	6.5%	5.0%	5.1%	N/A	5.2%	6.6%	5.6%
4	6.6%	7.2%	8.2%	4.7%	N/A	5.2%	5.2%	4.2%
3	10.7%	12.9%	9.0%	11.1%	N/A	12.6%	10.5%	8.1%
2	5.8%	5.7%	5.5%	6.1%	N/A	8.6%	6.6%	7.0%
1 – No consideration at all	47.4%	50.8%	49.7%	40.8%	N/A	49.3%	56.3%	51.5%
I don't make the decision	24.0%	16.9%	22.7%	32.3%	N/A	19.1%	14.7%	23.5%
<u>Influence of generally increasing travel costs</u>								
5 – Strong consideration	5.0%	6.6%	4.5%	3.9%	N/A	N/A	N/A	5.3%
4	6.5%	8.3%	6.3%	5.3%	N/A	N/A	N/A	5.2%
3	11.7%	12.0%	12.4%	11.2%	N/A	N/A	N/A	10.1%
2	7.4%	7.0%	6.9%	8.0%	N/A	N/A	N/A	8.5%
1 – No consideration at all	44.6%	48.1%	47.5%	37.5%	N/A	N/A	N/A	44.7%
I don't make the decision	24.9%	18.0%	22.3%	34.2%	N/A	N/A	N/A	26.2%
<u>Main Destination</u>								
Palm Beach County	92.8%	92.7%	92.3%	93.2%	90.4%	89.4%	90.6%	91.3%
<u>First Trip to PBC</u>								
	26.7%	30.7%	30.7%	18.8%	27.8%	22.4%	26.7%	26.9%
<u>Description of Travel Party*</u>								
Self Only	40.1%	37.7%	37.5%	44.7%	31.1%	28.7%	28.8%	33.0%
Adult family members or friends	33.7%	40.8%	32.6%	28.4%	43.0%	44.6%	47.4%	38.2%
Business Associates	24.6%	19.4%	27.8%	26.2%	22.2%	25.5%	23.7%	28.0%
Children <12 years of age	6.9%	12.3%	6.3%	2.5%	11.5%	9.3%	5.0%	8.1%
Grandchildren <12 years of age	0.3%	0.5%	0.0%	0.4%	0.8%	1.3%	0.3%	0.3%

*Multiple responses accepted.



Hotel Survey: 3rd Quarter 2006

Characteristics of the Visit (Continued)	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Participation in Specific Activities*								
Restaurants	92.5%	91.4%	92.7%	93.0%	93.1%	91.5%	92.4%	93.0%
Shopping	28.3%	31.6%	26.8%	26.5%	38.9%	40.0%	38.9%	33.5%
Went to Beach	24.1%	24.3%	26.4%	22.1%	36.8%	25.3%	26.3%	30.7%
Swimming	13.6%	13.9%	14.6%	12.5%	13.6%**	12.8%	11.7%	24.2%
Bars/Nightclubs	8.6%	9.8%	6.7%	9.5%	17.0%	12.4%	12.5%	13.2%
Visited downtown West Palm Beach Attractions/City Place	8.3%	2.1%	14.1%	8.8%	14.2%	8.7%	12.1%	12.2%
Golf, Tennis	6.5%	7.7%	7.3%	4.4%	12.1%	10.5%	18.8%	8.7%
Visited downtown Delray Beach Attractions	4.5%	5.0%	3.7%	4.7%	11.4%	7.8%	8.6%	7.7%
Visited Mizner Park/Boca Raton	2.9%	3.3%	2.2%	3.5%	8.4%	7.5%	9.7%	8.3%
Visited Wildlife Refuge	1.5%	1.8%	0.8%	1.8%	3.0%	3.4%	3.7%	3.9%
Museums, Art galleries	1.4%	0.5%	2.0%	1.6%	4.0%	3.0%	6.8%	3.8%
Boating	1.1%	1.8%	0.5%	0.9%	13.6%**	1.7%	1.8%	3.2%
Attended a Sporting Event	1.0%	1.5%	1.0%	0.4%	0.4%	2.4%	3.6%	1.8%
Performing Arts (plays, concerts, dance)	0.7%	0.0%	0.4%	1.9%	1.6%	1.5%	3.0%	2.0%
Attractions	0.7%	1.5%	0.6%	0.0%	4.2%	3.1%	3.3%	3.4%
Visited Riviera Beach/Singer Island	0.7%	1.3%	0.3%	0.5%	1.3%	1.4%	1.8%	1.5%
Pari-mutuels (dog-track)	0.7%	1.3%	0.3%	0.3%	0.7%	0.3%	0.4%	0.1%
Snorkeling	0.6%	0.5%	0.8%	0.5%	13.6%**	0.5%	1.0%	1.2%
Fishing	0.5%	0.5%	1.0%	0.0%	13.6%**	1.7%	1.8%	0.9%
Gambling Cruise	0.5%	0.5%	0.5%	0.3%	1.7%	1.8%	0.7%	0.7%
Visited Downtown at the Gardens	0.4%	1.1%	0.0%	0.0%	N/A	1.7%	2.8%	1.7%
Surfing	0.4%	0.5%	0.6%	0.0%	13.6%**	0.4%	0.6%	0.3%
Visited downtown Lake Worth	0.3%	0.0%	0.4%	0.4%	1.4%	1.4%	2.2%	1.9%
Diving	0.3%	0.8%	0.0%	0.0%	13.6%**	0.1%	0.3%	1.0%
Competed in Sports Event	0.3%	0.0%	0.0%	0.9%	0.7%	1.2%	0.9%	0.6%
Palm Beach County Convention Center	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.4%	0.4%
Kite Surfing	0.0%	0.0%	0.0%	0.0%	13.6%**	0.1%	0.2%	0.0%
Other	5.2%	5.3%	6.3%	4.3%	5.4%	4.8%	7.6%	5.6%

*Multiple responses accepted.

** Represents combined data from the old closed-end answers: 'boating/fishing/diving' and 'other water activities'



Hotel Survey: 3rd Quarter 2006

Attitudes about Trip to Palm Beach County	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Things Liked Best – Top Mentions								
Climate/Weather	25.3%	22.6%	20.5%	33.6%	22.1%	41.9%	49.5%	35.1%
Beaches/Ocean	18.7%	19.8%	19.2%	17.5%	16.4%	10.0%	7.9%	12.3%
Beautiful Area/Nice Place	8.5%	6.8%	11.4%	7.0%	11.2%	6.3%	5.6%	6.0%
Nice People	4.7%	5.5%	3.3%	5.4%	5.7%	4.2%	4.2%	4.0%
Cleanliness	4.6%	5.3%	5.8%	2.4%	4.1%	3.6%	3.2%	4.7%
Visiting Friends/Friends	4.2%	5.2%	3.2%	4.4%	6.0%	5.8%	3.2%	4.0%
Hotel	4.1%	3.8%	4.4%	4.2%	6.6%	3.7%	3.7%	4.0%
Relaxing Atmosphere	3.5%	2.2%	4.4%	3.8%	3.0%	2.3%	2.7%	4.8%
Restaurant	2.9%	1.9%	3.4%	3.2%	3.5%	2.6%	1.9%	3.6%
Location	1.9%	1.1%	0.5%	4.1%	2.1%	0.3%	0.8%	1.0%
Golf	1.8%	3.0%	1.7%	0.9%	1.6%	1.5%	1.8%	1.9%
Shopping	1.8%	2.4%	2.1%	0.6%	1.6%	1.7%	1.1%	1.6%
Palm Trees	1.6%	1.8%	2.0%	1.1%	1.6%	1.4%	0.5%	1.4%
Convenience	1.6%	1.0%	3.1%	0.4%	1.1%	0.9%	1.6%	1.4%
Ease getting around	1.6%	3.9%	0.0%	1.0%	0.6%	0.2%	0.6%	1.0%
CityPlace	1.4%	0.6%	2.7%	0.6%	1.4%	0.4%	0.8%	0.9%
Everything	1.4%	0.6%	2.8%	0.6%	1.4%	3.4%	1.4%	3.3%
Diversity of Activities	1.3%	1.4%	0.6%	2.1%	1.2%	0.9%	0.3%	1.1%
Other	9.2%	11.2%	9.1%	7.0%	9.1%	8.8%	9.4%	7.7%



Hotel Survey: 3rd Quarter 2006

Attitudes about Trip to Palm Beach County	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Things Liked Least – Top Mentions								
Traffic/Bad Drivers	30.6%	34.8%	27.6%	29.0%	23.3%	33.4%	40.2%	36.5%
Humidity/Poor Weather	28.3%	24.5%	29.2%	32.2%	19.7%	17.5%	9.7%	19.0%
Road Construction	4.4%	2.7%	8.3%	1.7%	2.9%	3.6%	3.8%	2.9%
Expensive	3.7%	6.7%	2.5%	1.7%	5.3%	5.2%	4.7%	5.1%
Stay Was Too Short	2.7%	1.7%	0.9%	5.3%	1.8%	3.5%	2.2%	1.1%
Hotel (general)	2.3%	3.3%	3.7%	0.0%	2.1%	3.4%	2.6%	3.0%
Crowded	1.7%	0.0%	3.1%	1.8%	2.7%	1.5%	4.0%	3.9%
Distance from home	1.2%	0.0%	0.9%	3.0%	0.0%	0.6%	0.0%	0.6%
Crime/Gangs	1.2%	0.0%	0.0%	3.7%	0.9%	0.7%	0.0%	0.6%
Unfriendly People	1.1%	2.6%	0.0%	0.6%	1.8%	1.2%	0.5%	3.0%
Lack of Directional Signs	0.5%	0.0%	0.0%	1.5%	1.8%	1.2%	2.1%	0.5%
Cost of Hotel	0.2%	0.6%	0.0%	0.0%	0.3%	1.1%	3.8%	0.6%
Other	14.8%	18.5%	13.2%	11.5%	15.9%	16.3%	15.2%	14.6%
Nothing liked least	7.5%	4.6%	10.5%	7.5%	22.1%	10.7%	11.6%	9.2%



Hotel Survey: 3rd Quarter 2006

Attitudes about Trip to Palm Beach County	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Suggestions for Improvement - Top Mentions*								
Longer stay	28.8%	38.9%	26.2%	20.5%	N/A	17.2%	18.4%	21.2%
Better weather	11.8%	11.2%	10.0%	15.7%	N/A	12.2%	18.0%	11.4%
Come during vacation time	7.9%	7.7%	8.4%	7.4%	N/A	7.8%	5.8%	6.3%
Improve traffic/Finish Construction on I-95	7.2%	7.0%	5.9%	8.5%	N/A	9.1%	10.0%	11.3%
Less business and more partying/more free time	6.9%	2.8%	9.8%	8.3%	N/A	4.5%	1.5%	9.3%
Come with friends/family	3.6%	1.4%	4.9%	4.5%	N/A	0.3%	3.7%	4.8%
Better hotel	3.6%	1.2%	6.3%	3.0%	N/A	5.0%	4.6%	1.6%
Winter Visit	2.9%	0.0%	6.9%	1.2%	N/A	0.8%	0.0%	0.4%
Lower prices	2.5%	6.1%	1.3%	0.0%	N/A	2.0%	1.9%	2.7%
Go to the Beach	1.3%	0.0%	0.0%	4.8%	N/A	1.5%	0.4%	0.0%
Cheaper hotel	1.1%	3.3%	0.0%	0.0%	N/A	0.0%	4.8%	1.7%
Nothing	6.5%	6.5%	6.0%	7.0%	N/A	13.9%	9.3%	8.5%
Other	17.6%	15.1%	15.3%	22.0%	N/A	24.5%	22.1%	21.7%

*Multiple responses accepted.



Hotel Survey: 3rd Quarter 2006

Characteristics of Visitors	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
Age								
Under 35	18.8%	14.1%	22.4%	20.1%	18.8%	16.4%	14.5%	18.5%
35 to 54	58.8%	62.8%	57.9%	55.7%	57.8%	53.4%	49.8%	57.3%
55 to 64	16.1%	15.6%	14.3%	18.3%	18.0%	23.4%	21.4%	18.2%
65 +	6.3%	7.5%	5.4%	5.9%	5.4%	6.8%	14.2%	6.0%
Occupation								
Professional/Managerial	63.1%	63.4%	64.0%	61.7%	53.4%	65.3%	60.7%	60.2%
Sales	16.1%	12.6%	14.8%	21.3%	14.9%	16.5%	12.4%	16.4%
Technical	8.1%	6.3%	9.6%	8.5%	7.7%	5.7%	5.2%	8.8%
Retired	7.6%	10.3%	6.7%	5.7%	7.0%	8.1%	15.9%	7.3%
Student	0.9%	0.5%	1.8%	0.4%	1.6%	0.8%	1.8%	1.3%
Other	4.1%	7.0%	3.1%	2.4%	15.3%	3.6%	4.0%	6.1%
Hispanic Origin	7.0%	4.5%	9.5%	6.9%	N/A	5.5%	2.3%	6.7%
Ethnicity								
White/Caucasian	90.4%	91.0%	86.1%	94.3%	90.8%	93.1%	94.4%	91.8%
African-American/Black	5.7%	6.5%	7.9%	2.5%	6.5%	3.2%	3.1%	4.9%
Asian	3.8%	2.6%	6.0%	2.8%	2.5%	3.1%	2.6%	2.8%
Other	0.1%	0.0%	0.0%	0.4%	0.2%	0.6%	0.0%	0.6%



Hotel Survey: 3rd Quarter 2006

Characteristics of Visitors (Continued)	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
<u>Income</u>								
Under \$45,000	5.3%	5.5%	6.1%	4.4%	6.6%	3.2%	3.3%	3.3%
\$45,000 to \$64,999	11.9%	13.1%	10.2%	12.7%	10.9%	7.7%	7.9%	10.7%
\$65,000 to \$99,999	26.4%	19.7%	32.4%	27.1%	21.9%	22.0%	19.4%	21.3%
\$100,000 to \$200,000	41.3%	43.8%	40.1%	39.8%	37.8%	40.7%	40.0%	42.3%
Over \$200,000	15.1%	17.9%	11.1%	16.0%	22.9%	26.4%	29.4%	22.4%
<u>Gender</u>								
Male	60.6%	64.2%	57.6%	60.1%	56.6%	54.7%	58.2%	59.7%
Female	39.4%	35.8%	42.4%	39.9%	43.4%	45.3%	41.8%	40.3%



Hotel Survey: 3rd Quarter 2006

Place of Origin	Total 3Q 2006	July	Aug.	Sept.	Total 3Q 2005	Total 4Q 2005	Total 1Q 2006	Total 2Q 2006
<u>Domestic</u>	91.9% (n=673)	91.6%	92.3%	92.0%	90.1% (n=664)	88.7% (n=648)	92.2% (n=680)	90.8% (n=671)
Florida	26.7% (n=195)	28.5%	24.4%	27.6%	23.4% (n=172)	14.5% (n=106)	12.3% (n=91)	18.1% (n=134)
Southeast	20.1% (n=147)	23.4%	18.9%	18.0%	16.6% (n=122)	18.3% (n=134)	17.3% (n=128)	18.3% (n=136)
Midwest	14.2% (n=104)	11.9%	15.1%	15.1%	12.6% (n=93)	15.2% (n=111)	17.3% (n=128)	14.3% (n=106)
Mid Atlantic	11.2% (n=82)	11.4%	10.5%	11.3%	13.0% (n=96)	14.2% (n=104)	16.8% (n=124)	12.6% (n=93)
Far West	8.6% (n=63)	8.5%	9.9%	8.2%	7.3% (n=54)	8.0% (n=58)	4.9% (n=36)	8.8% (n=65)
New York	7.0% (n=51)	6.0%	8.1%	6.8%	9.9% (n=73)	12.6% (n=92)	15.0% (n=110)	11.9% (n=88)
New England	4.1% (n=30)	2.0%	5.4%	4.8%	7.2% (n=53)	5.9% (n=43)	8.5% (n=63)	6.8% (n=50)
<u>International</u>	8.1% (n=59)	8.4%	7.7%	8.0%	9.9% (n=73)	11.3% (n=83)	7.8% (n=58)	9.2% (n=68)
Europe (net)	3.8% (n=28)	3.4%	3.9%	4.2%	4.5% (n=33)	6.8% (n=50)	3.8% (n=28)	4.5% (n=34)
- England/UK	1.7% (n=12)	0.8%	2.1%	2.2%	3.2% (n=23)	3.2% (n=23)	1.7% (n=13)	2.3% (n=17)
- Germany	0.3% (n=2)	0.3%	0.5%	0.0%	0.4% (n=3)	1.2% (n=9)	1.2% (n=9)	0.4% (n=3)
Canada	1.9% (n=14)	1.6%	1.5%	2.3%	1.6% (n=12)	1.9% (n=14)	2.7% (n=20)	1.6% (n=12)
Latin America / Caribbean	1.8% (n=13)	2.3%	1.9%	1.1%	3.1% (n=23)	1.6% (n=12)	0.7% (n=5)	2.0% (n=15)
Australia/Asia	0.6% (n=4)	0.8%	0.5%	0.5%	0.1% (n=1)	0.5% (n=4)	0.1% (n=1)	0.8% (n=6)
Middle East	0.1% (n=1)	0.3%	0.0%	0.0%	0.4% (n=3)	0.4% (n=3)	0.5% (n=4)	0.3% (n=2)
Africa	0.0% (n=0)	0.0%	0.0%	0.0%	0.1% (n=1)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)



Hotel Survey: 3rd Quarter 2006

Pleasure Vs. Business By Selected Place of Origin	<u>Total 3Q 2006</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2005</u>	<u>Total 4Q 2005</u>	<u>Total 1Q 2006</u>	<u>Total 2Q 2006</u>
<u>Florida</u>	26.7%	28.5%	24.4%	27.6%	23.4%	14.5%	12.3%	18.1%
Business	18.6%	19.0%	17.4%	19.8%	12.6%	9.4%	8.9%	13.9%
Pleasure	7.7%	8.7%	6.6%	7.9%	10.4%	4.9%	3.3%	4.1%
<u>Southeast</u>	20.1%	23.4%	18.9%	18.0%	16.6%	18.3%	17.3%	18.3%
Business	14.9%	14.5%	14.5%	15.7%	10.9%	13.4%	12.5%	14.6%
Pleasure	5.1%	8.7%	4.1%	2.5%	5.6%	4.8%	4.7%	3.7%
<u>Midwest</u>	14.2%	11.9%	15.1%	15.1%	12.6%	15.2%	17.3%	14.3%
Business	10.1%	6.2%	11.6%	11.9%	6.9%	7.3%	11.0%	9.2%
Pleasure	4.1%	5.8%	3.7%	3.3%	5.7%	7.6%	6.0%	5.1%
<u>Mid Atlantic</u>	11.2%	11.4%	10.5%	11.3%	13.0%	14.2%	16.8%	12.6%
Business	6.1%	5.0%	5.4%	7.9%	4.9%	6.3%	7.3%	5.8%
Pleasure	4.5%	5.4%	5.0%	3.3%	7.9%	7.9%	9.5%	6.6%
<u>Far West</u>	8.6%	8.5%	9.9%	8.2%	7.3%	8.0%	4.9%	8.8%
Business	6.7%	5.4%	8.3%	7.0%	4.6%	5.7%	3.9%	7.4%
Pleasure	1.5%	2.1%	0.8%	1.2%	2.7%	2.3%	0.9%	1.4%
<u>New York</u>	7.0%	6.0%	8.1%	6.8%	9.9%	12.6%	15.0%	11.9%
Business	2.3%	2.9%	2.5%	2.1%	3.3%	4.3%	4.7%	4.2%
Pleasure	4.2%	3.3%	5.8%	3.7%	6.6%	8.1%	10.2%	7.7%
<u>New England</u>	4.1%	2.0%	5.4%	4.8%	7.2%	5.9%	8.5%	6.8%
Business	2.9%	1.2%	3.7%	3.3%	3.5%	2.2%	3.8%	2.7%
Pleasure	1.0%	0.8%	0.4%	1.7%	3.7%	3.7%	4.7%	3.7%