



Report on Palm Beach County Tourism Fourth Quarter 2005 (October, November and December)

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February 7, 2006



Introduction: 4th Quarter 2005

Background

- The following report contains information collected during the 4th Quarter 2005 (October, November and December 2005), the first 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: 4th Quarter 2005

Occupancy Rates

- **During the fourth quarter of 2005, the average occupancy rate of participating PBC hotels was 73.1% - 6.7 percentage points lower than in the fourth quarter of 2004 (79.8%) and 10.1 percentage points higher than last quarter (63.0%).**
 - The average occupancy rate among smaller properties (50-100 rooms, 75.7%) was slightly higher than the average occupancy rate among larger properties (101+ rooms, 72.6%).
 - The occupancy rate during 4Q2005 was highest in November among both smaller and larger properties, (84.0% among smaller hotels and 82.1% among larger hotels). That is partially due to the hurricane at the end of October which forced more people to spend nights at hotels in November 2005 (70.8% of hotel managers who reported a hurricane impact on room reservations in November believed that the impact was positive).
- **In 4Q2005, hotels in the Central (74.3%) and Northern (73.8%) regions reported comparable occupancy rates. Properties in the Southern region reported an average occupancy rate of 71.5%.**
 - Compared to 4Q2004, properties in the Southern region reported the largest decrease in the average occupancy rate (from 78.8% in 2004 to 71.5% in 2005, a 7.3 percentage point decrease).
- **In 4Q2005, an estimated 956,948 Palm Beach County hotel room nights were occupied* – a decrease of 95,414 room nights compared to 4Q2004 (1,052,362) and an increase of 94,913 compared to 3Q2005 (862,035).**
- **Based on hotel managers who responded, on average, 2.7% of hotel guests were international in 4Q2005.**
 - Larger properties (101+ rooms, 2.6%) reported more guests coming from foreign countries than smaller properties (50-100 rooms, 1.9%).
 - Among larger properties, those with 101-219 rooms reported that 3.4% of their guests came from foreign countries while hotels with 220-500 rooms reported that only 0.8% were international.
 - Based on the hotels who responded, properties in the Southern region had the highest percentage of international guests (3.8%) during 4Q2005.
- **In 4Q2005, surveyed property managers reported hotel rooms being occupied almost equally by leisure travelers (35.4%), business travelers (34.7%) and convention/group (30.0%) travelers.**
- **Hotels designed as convention hotels reported that 35.4% of their booking were made by convention/group travelers. This is at parity with 4Q2004 (36.2%) and represents an increase of 4.5 percentage points compared to 3Q2005 (30.9%).**

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



Property Manager Survey: 4th Quarter 2005

Hurricane Impact

- In October 2005, the majority of hotel managers (84.6%) claimed that the hurricanes in August, September and October of 2004 had an impact on their properties' reservation.
- After Hurricane Wilma at the end of October 2005, PBC property managers were asked about its impact on their properties' reservations. Over eight-in-ten (85.2%) reported that the hurricane impacted hotel rooms reservations.
 - Among those who reported an impact on hotel reservations, 70.8% believed that the impact was positive while 29.2% believed the impact was negative.

Average Daily Room Rate (ADR)

- **The ADR for participating Palm Beach County properties in the fourth quarter of 2005 was \$137.81* – this represents a 2.1% increase compared to the fourth quarter last year (\$134.98) and a 27.9% increase compared to the previous quarter (\$107.76).**
 - Larger properties (101+ rooms) reported an ADR of \$141.57* while smaller properties reported an ADR was \$119.38*.
 - Among larger properties, the ADR for hotels with 101-219 rooms was \$109.19*, whereas the ADR for hotels with 220-500 rooms was \$147.65*.

Future Business Outlook

- In 4Q2005, surveyed property managers most often predicted an increase in properties' room revenue (72.7%) rather than a decrease (12.6%) for subsequent months, as compared to room revenue for the same months in 2004. The percentage of those who predicted no change in room revenue compared to one year ago was 14.7%.
 - Among property managers predicting an increase in room revenue compared to the previous year, the average increase expected was 10.0%.
 - Among property managers expecting a decrease in room revenue compared to the previous year, the average decrease expected was 15.3%.

Bookings Via Third Party Websites

- According to surveyed hotel managers, the average percentage of bookings sold via third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc) in the fourth quarter of 2005 was 10.6% - comparable to 4Q2004 (11.4%) and slightly lower than in 3Q2005 (12.9%).
 - Smaller properties (50-100 rooms) booked 14.3% (on average) of their rooms through third party websites while larger properties (101+ rooms) booked, on average, 8.0% of their rooms that way.

* December 2005 ADR is based on hotels that responded to the survey in both December 2004 and December 2005



Hotel Visitor Survey: 4th Quarter 2005

Characteristics of Stay

- During the fourth quarter of 2005, the average party size of surveyed hotel guests was 2.1*, comparable with the average party size in 4Q2004 (2.0) and in 3Q2005 (2.2). The median party size for 4Q2005 and for all months within the quarter was 2.0.
- In 4Q2005, the average number of nights spent in a hotel was 3.4 and the average number of rooms occupied per night* was 1.3.
- During 4Q2005, Palm Beach County received more business (conference/convention/business meeting, 54.8%) than leisure travelers (37.5%).
 - The percentage of business travelers was highest in October 2005 (59.1%) while the percentage of vacationers was highest in December 2005 (41.2%).
 - Compared to the fourth quarter of 2004, the percentage of business travelers decreased by 11.4 percentage points (from 66.2% to 54.8%) while the percentage of vacationers increased by 12.0 percentage points (from 25.5% in 4Q2004 to 37.5% in 4Q2005).

Planning the Trip to Palm Beach County

- Consistent with the percentage of business travelers, most surveyed visitors reported that they selected PBC over other destinations due to a work related trip (53.4%). Other frequently mentioned reasons for selecting PBC over other destinations were 'visit friends/relatives' (25.2%), 'convenient flights' (9.3%) and a 'previous visit' (9.1%).
 - Compared to 4Q2004, mention of 'work related trip' decreased by 10.4 percentage points (from 63.8% in 4Q2004 to 53.4% in 4Q2005). Mention of 'visit friends/relatives' (25.2%) increased by 8.0 percentage points (from 17.2% in 4Q2004), 'convenient flights' (9.3%) increased by 5.8 percentage points (from 3.5% in 4Q2004), while mention of 'previous visit' is comparable to 4Q2004 (9.3%).
- **One-half of 4Q2005 surveyed guests (50.5%) were short-term planners (planned their trip to Palm Beach County one month or less in advance). This represents a 6.3 percentage point decrease compared to 4Q2004 (56.8%) and a 6.2 percentage point decrease compared to 3Q2005 (56.7%).**
- Most respondents (53.3%) reported that their employer made the decision about the trip to PBC - a decrease of 6.9 percentage points compared to 4Q2004 (60.2%) and an increase of 7.0 percentage points compared to 3Q2005 (46.3%).

* 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 Visitor Survey: 4th Quarter 2005

Booking a Trip to Palm Beach County

- **Use of a travel agent to book part of visitors' trip to PBC (21.4%) has decreased compared to 4Q2004 (26.9%) and 3Q2005 (24.6%).**
 - Although use of a travel agent decreased compared to 3Q2005, it has increased over the course of the fourth quarter, going from 17.9% in October to 22.1% in November to 24.4% in December.
- **More than one-half (52.5%) of respondents reported using the Internet to book part of their trip to PBC in 4Q2005.**
 - Use of the Internet in 4Q2005 (52.5%) was higher than in 4Q2004 (42.9%) and higher than in all other quarters of 2005 (41.1% in 1Q2005, 43.7% in 2Q2005 and 47.0% in 3Q2005).
 - Among those hotel guests who used the Internet to book part of their trip, most used it to book airfare (78.3%), hotel rooms (54.6%), and/or car rentals (43.2%).
 - Visitors most often booked their hotel rooms at hotel websites (28.7%) - an increase of 2.8 percentage points compared to the same quarter in 2004 (25.9%).
 - Just over one-in-ten (11.7%) surveyed guests reported that their trip to Palm Beach County was part of a package. This is 5.4 percentage points higher than in 4Q2004 (6.3%) and comparable with 3Q2005 (12.4%).
 - In 4Q2005, 83.5% of surveyed visitors arrived in PBC via airplane - a 7.1 percentage point increase compared to 4Q2004 (76.4%) and a 14.4 percentage point increase compared to last quarter (69.1%).

Visitor Expenditures

- **During the fourth quarter of 2005, surveyed visitors' average per party* expenditure in Palm Beach County was \$1,459 – \$110 more (8.2% increase) than the average in the fourth quarter of last year (\$1,349) and \$140 more (10.6% increase) than the average per party expenditure last quarter (\$1,319).**
 - All spending categories experienced decreases compared to the prior year except for Lodging (from \$592 to \$823 – an increase of \$231 or 39.0%).
 - The average per person (\$695) and per person/day (\$204) expenditures increased compared to the fourth quarter of 2004 (\$675 per person and \$182 per person/day in 4Q2004) and last quarter (\$600 per person and \$154 per person/day in 3Q2005).
- **In 4Q2005, vacationers spent \$1,598 per party, on average, while business travelers spent \$1,366 (average per party).**
 - Business travelers per party expenditures (\$1,366) increased by 24.5% compared to 4Q2004 (\$1,097) and by 22.3% compared to 3Q2005 (\$1,117).
 - Vacationers per party expenditures (\$1,598) decreased by 20.1% compared to 4Q2004 (\$2,000) and are comparable with expenditures in 3Q2005 (\$1,570) .

* 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 2005

Characteristics of Visit

- The percentage of first time visitors to Palm Beach County decreased in 4Q2005 (22.4%) compared to 4Q2004 (25.3%) and 3Q2005 (27.8%).
- **Eight-in-ten (80.8%) surveyed hotel guests plan to return to Palm Beach County some time in the future. This is comparable to 4Q2004 (80.0%) and 3Q2005 (82.0%).**
 - Among those who plan to visit Palm Beach County again, 62.4% plan to do so in the next year; 34.7% within the next three months.
- **When visiting Palm Beach County during the fourth quarter of 2005, visitors most often ate at area restaurants (91.5%), went shopping (40.0%) and went to the beach (25.3%).**
- Approximately one-half of surveyed guests (49.3%) affirmed that the rising cost of fuel/transportation would not affect their decision to come to Palm Beach County (rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). Ten point four percent might change their plans (rated 4 or 5 on a 5-point scale) and 19.1% reported that they are not in charge of making the decision.

Attitudes toward Palm Beach County

- **As seen in the last four quarters, the three most frequently mentioned aspects that visitors liked best about PBC were 'climate/weather' (41.9%), 'beaches' (10.0%) and 'beautiful area' (6.3%).**
 - Compared to last quarter, the percentage of those mentioning 'climate/weather' increased by 19.8 percentage points (from 22.1% in 3Q2005 to 41.9% in 4Q2005).
- **'Traffic/bad drivers' (33.4%) and 'humidity/poor weather' (17.5%) were the aspects visitors most often disliked about their trip to PBC in 4Q2005.**
 - Although the percentage of those mentioning 'traffic/bad drivers' decreased by 2.8 percentage points compared to the fourth quarter of 2004 (36.2%), it has increased by 10.1 percentage points compared to last quarter (from 23.3% to 33.4%).
- During 4Q2005, surveyed visitors reported that a longer stay (17.2%), better weather (12.2%) and traffic improvements/finish construction on I-95 (9.1%) would make their next trip to PBC better.

Characteristics of Visitors

- Over nine-in-ten (93.1%) surveyed visitors to PBC in 4Q2005, were White/Caucasian, approximately two-in-three had professional/managerial occupations (65.3%), and two-thirds (67.1%) claimed to have an annual household income of \$100,000 or greater (an increase of 8.9 percentage points compared to 4Q2004, 58.2%).
- Most often, visitors were traveling with adult family members/friends (44.6%) or alone (28.7%).
- Domestic travelers made up 88.7% of surveyed visitors while international travelers represented 11.3% 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: 4th Quarter 2005

	Total 4Q 2005	Oct. 2005	Nov. 2005	Dec. 2005	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Occupancy Rate								
Month/Quarter	73.1%	61.2%	82.3%	73.8%	79.8%	88.3%	72.7%	63.0%
FYTD (Oct. - Set.)	72.4%	61.2%	71.8%	72.4%	79.8%	84.1%	80.2%	76.0%
Room Nights Occupied^{1*}								
Month/Quarter	956,948+	265,830+	354,697+	336,421+	1,052,362+	1,173,859+	969,020+	862,035+
FYTD (Oct. - Set.)	956,948+	265,830+	620,527+	956,948+	1,052,362+	2,226,221+	3,195,241+	4,057,276+
Percentage of Room Nights Occupied								
Leisure	35.4%	35.9%	31.2%	40.6%	35.4%	42.1%	35.0%	36.2%
Business	34.7%	26.4%	35.3%	34.6%	37.0%	31.8%	34.7%	37.8%
Convention/Group	30.0%	37.7%	33.5%	24.8%	27.5%	26.1%	30.3%	26.0%
Average Daily Room Rate²	\$137.81	\$124.19	\$145.99	\$148.11	\$134.98	\$206.84	\$143.81	\$107.76

+ 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 2005

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>
4th Quarter (Oct/Nov/Dec)	N/A	N/A	N/A	57.5	59.8	64.2	79.8	73.1
October	61.0	66.3	63.0	54.3	59.2	61.7	84.5**	61.2
November	64.2	69.7	69.7	59.6	60.8	67.0	80.8**	82.3
December	63.8	63.3	63.5	58.4	59.4	64.0	74.0	73.8
1st Quarter (Jan/Feb/Mar)	N/A	N/A	N/A	76.2	77.9	83.8	88.3	N/A
2nd Quarter (April/May/June)	N/A	N/A	N/A	65.1	67.0	71.8	72.7	N/A
3rd Quarter (July/August/Sept.)	N/A	N/A	N/A	57.3	57.8	64.2	63.0	N/A
Fiscal YTD (Oct. – Sept.)	66.7	68.8	67.3	64.1	65.7	70.9	76.0	72.4
Number of Room Nights Occupied in 4th Quarter*							1,052,362+	956,948+

+ 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 2005

	<u>Total 4Q 2005</u>	<u>Oct. 2005</u>	<u>Nov. 2005</u>	<u>Dec. 2005</u>	<u>Total 4Q 2004</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>	<u>Total 3Q 2005</u>
Conference/Convention Bookings								
<u>All Hotels</u>								
% Occupied Room Nights in County	30.0%	37.7%	33.5%	24.8%	27.5%	26.1%	30.3%	26.0%
Occupied Room Nights in County	302,473+	100,218	118,823+	83,432+	286,890	307,071	295,390	243,936
Occupied Room Nights in County FYTD (Oct.- Sept.)	302,473+	100,218	219,041+	302,473+	286,890	593,961	889,351	1,133,287
<u>Convention Hotels</u>								
% Occupied Room Nights	35.4%	44.3%	39.5%	29.4%	36.2%	31.6%	37.9%	30.9%
Occupied Room Nights	157,068+	49,440	63,324+	44,304+	169,605	180,909	185,481	134,005
Occupied Room Nights FYTD (Oct.- Sept.)	157,068+	49,440	112,764+	157,068+	169,605	350,514	535,995	670,000
Available Inventory*								
Rooms in County	43,083+	14,012+	14,366+	14,705+	43,070	44,356	44,083	44,499
Room Nights	1,321,198+	434,363+	430,980+	455,855+	1,320,661+	1,330,519+	1,337,086+	1,364,636+
Room Nights FYTD (Oct.- Sept.)	1,321,198+	434,363+	865,343+	1,321,198+	1,320,661+	2,651,180+	3,988,266+	5,352,902+
Response Rate								
Month/Quarter (for all hotels in County)	55.1%	51.4%	57.3%	56.7%	67.5%	66.8%	63.1%	62.9%
FYTD (Oct.- Sept.)	55.1%	51.4%	54.4%	55.1%	67.5%	67.2%	65.8%	65.1%

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

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



Property Manager Survey: 4th Quarter 2005

Occupancy Rate	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Size of Hotel								
50 - 100 Rooms	75.7%	64.6%	84.0%	76.5%	79.2%	87.4%	66.7%	63.5%
101 + Rooms	72.6%	60.6%	82.1%	73.2%	80.0%	88.5%	73.8%	63.1%
101-219	75.7%	63.3%	84.2%	76.8%	84.1%	89.9%	73.1%	66.0%
220-500	70.1%	57.0%	84.1%	69.4%	77.3%	86.2%	73.7%	58.6%
All Properties	73.1%	61.1%	82.3%	73.8%	79.8%	88.3%	72.7%	63.0%
Geographic Region								
North	73.8%	64.1%	87.9%	69.8%	80.3%	86.5%	71.3%	61.3%
Central	74.3%	59.6%	81.2%	77.1%	80.7%	90.0%	75.5%	68.2%
South	71.5%	62.2%	81.2%	72.6%	78.8%	87.7%	70.8%	58.7%

<u>What percent of your occupancy is international?</u>	Total 4Q 2005	October	November	December
Size of Hotel				
50-100 Rooms	1.9%	6.8%	0.3%	4.7%
101 + Rooms	2.6%	6.9%	2.0%	3.2%
101-219	3.4%	11.9%	2.1%	3.2%
220-500	0.8%	*	1.4%	1.0%
Total Hotel Size	2.7%	7.1%	1.8%	3.3%
Geographic Region				
North	1.4%	*	1.5%	2.4%
Central	2.2%	5.1%	2.1%	3.2%
South	3.8%	8.5%	1.5%	4.1%

* Base is too small to calculate percentages



Property Manager Survey: 4th Quarter 2005

Average Daily Room Rate	Total 4Q 2005	Oct.	Nov.	Dec.*	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Size of Hotel								
<u>50 - 100 Rooms</u>	\$119.38	\$104.47	\$119.69	\$140.76	\$132.25	\$180.22	\$125.42	\$103.02
<u>101 + Rooms</u>	\$141.57	\$127.50	\$151.09	\$149.77	\$135.91	\$211.33	\$146.79	\$108.85
101-219	\$109.19	\$96.36	\$122.69	\$101.04	\$100.85	\$163.97	\$112.43	\$91.61
220-500	\$147.65	\$132.35	\$147.22	\$160.80	\$133.63	\$212.75	\$150.23	\$107.56
<u>All Properties</u>	\$137.81	\$124.19	\$145.99	\$148.11	\$134.98	\$206.84	\$143.81	\$107.76

* December ADR is based on hotels that responded to the survey in both December 2004 and December 2005



Property Manager Survey: 4th Quarter 2005

Occupied Room Nights *	Occupied Room Nights	% Change
4Q		
2003	934,055	
2004	1,052,362+	12.7
2005	956,948+	- 9.1
October		
2003	303,259	
2004	365,945+	20.7
2005	265,830+	- 27.4
November		
2003	317,721	
2004	351,722+	10.7
2005	354,697+	0.8
December		
2003	313,075	
2004	334,695+	6.9
2005	336,421+	0.5
1Q		
2003	1,100,056	
2004	1,186,693	7.9
2005	1,173,859+	- 1.1
2Q		
2003	953,428	
2004	1,022,634	7.3
2005	969,020+	- 5.2
3Q		
2003	829,143	
2004	859,630	3.7
2005	862,035+	0.3
FYTD (October – Dec)		
2003	934,055	
2004	1,052,362+	12.7
2005	956,948+	- 9.1

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

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



Property Manager Survey: 4th Quarter 2005

Impact of last year's hurricanes on property's reservations	<u>Total</u>	<u>North Region</u>	<u>Central Region</u>	<u>South Region</u>
October				
Impact	84.6%	100.0%	90.9%*	72.7%*
High	54.5%	25%	70.0%*	50.0%*
Moderate	36.4%	50%	30.0%*	37.5%*
Low	9.1%	25%	0.0%*	12.5%*
No Impact	15.4%	0.0%	9.1%*	27.3%*
Impact of the October 2005 hurricane on property's reservations	<u>Total</u>	<u>North Region</u>	<u>Central Region</u>	<u>South Region</u>
November				
Impact	85.2%	80.0%	81.8%	90.9%
Positive	70.8%	100.0%	60.0%	70.0%
Negative	29.2%	0.0%	40.0%	30.0%
No Impact	14.8%	20.0%	18.2%	9.1%

*Caution: Low base

Number of days closed due to Hurricane Wilma	<u>October 2005</u>
Closed	67.7%
1 day	6.9%
2 days	0.0%
3 days	0.0%
4 days	10.4%
5 days	3.2%
6 – 10 days	38.7%
11 - 15 days	8.4%
16 – 20 days	0.0%
21+ days	0.0%
Not closed	32.3%



Property Manager Survey: 4th Quarter 2005

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>
November 2005 / December 2005 predictions from October			
Foresee Decrease	9.8%	13.9%	15.7%
Average decrease (among those who foresee decrease)	37.5%	16.3%	8.2%
Foresee No Change	19.4%	23.4%	36.8%
Foresee Increase	70.8%	62.7%	47.5%
Average increase (among those who foresee increase)	10.2%	7.4%	11.8%
December 2005 / January 2006 predictions from November			
Foresee Decrease	18.0%	9.0%	13.4%
Average decrease (among those who foresee decrease)	6.3%	3.2%	9.0%
Foresee No Change	11.4%	23.4%	30.9%
Foresee Increase	70.6%	67.6%	55.7%
Average increase (among those who foresee increase)	10.3%	9.2%	12.0%
January 2006 / February 2006 predictions from December			
Foresee Decrease	8.7%	8.7%	8.7%
Average decrease (among those who foresee decrease)	15.0%	22.5%	15.0%
Foresee No Change	14.0%	17.0%	17.3%
Foresee Increase	77.4%	74.3%	74.0%
Average increase (among those who foresee increase)	9.2%	8.0%	8.0%
Fourth Quarter predictions from October, November and December			
Foresee Decrease	12.6%	10.5%	12.7%
Average decrease (among those who foresee decrease)	15.3%	14.0%	10.3%
Foresee No Change	14.7%	21.3%	27.9%
Foresee Increase	72.7%	68.2%	59.4%
Average increase (among those who foresee increase)	10.0%	8.4%	10.4%



Property Manager Survey: 4th Quarter 2005

Bookings via third party website	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Size of Hotel								
<u>50 - 100 Rooms</u>	14.3%	21.7%	15.0%	4.2%	16.4%	17.8%	18.8%	17.1%
<u>101 + Rooms</u>	8.0%	7.4%	6.9%	9.2%	9.5%	11.0%	10.4%	11.2%
101-219	9.1%	8.6%	8.0%	10.6%	10.5%	11.8%	11.5%	11.2%
220-500	2.6%	3.5%	2.0%**	2.4%**	5.1%	8.4%	7.0%	13.2%
<u>All Properties</u>	10.6%	14.1%	9.6%	8.0%	11.4%	12.4%	12.9%	12.9%

** 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 2005

Characteristics of Stay	Total <u>4Q</u> 2005	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	Total <u>4Q</u> 2004	Total <u>1Q</u> 2005	Total <u>2Q</u> 2005	Total <u>3Q</u> 2005
Average Party Size *	2.1	2.1	2.2	2.1	2.0	2.3	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	3.7	3.5	3.4	4.0	3.9	5.3	3.8	4.0
Nights in Hotel	3.4	3.2	3.3	3.8	3.7	4.9	3.7	3.9
Rooms per Night *	1.3	1.4	1.3	1.3	1.4	1.3	1.3	1.3

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



Hotel Survey: 4th Quarter 2005

Visitor Expenditures	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Average Expenditure Per Visit								
Lodging	\$823	\$730	\$927	\$813	\$592	\$1,132	\$636	\$566
Restaurant/Bar	\$296	\$288	\$277	\$327	\$325	\$544	\$352	\$347
Gifts/Shopping	\$153	\$141	\$175	\$144	\$181	\$407	\$233	\$125
Entertainment/Recreation	\$48	\$35	\$73	\$34	\$52	\$113	\$85	\$86
Local Travel	\$139	\$115	\$149	\$167	\$174	\$294	\$167	\$164
Total Per Party	\$1,459	\$1,309**	\$1,601	\$1,486	\$1,349	\$2,558	\$1,484	\$1,319
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$695	\$623	\$728	\$708	\$675	\$1,112	\$706	\$600
Total Per Person/ Per Day	\$204	\$195	\$220	\$186	\$182	\$227	\$191	\$154
Lodging	\$115	\$109	\$128	\$102	\$80	\$100	\$82	\$66
Restaurant/Bar	\$41	\$43	\$38	\$41	\$44	\$48	\$45	\$40
Gifts/Shopping	\$21	\$21	\$24	\$18	\$25	\$36	\$30	\$15
Entertainment/Recreation	\$7	\$5	\$10	\$4	\$7	\$10	\$11	\$10
Local Travel	\$20	\$17	\$20	\$21	\$24	\$26	\$21	\$19

** Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey).

* 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 2005

Visitor Expenditures	<u>Pleasure</u>							
	<u>Total 4Q 2005</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	<u>Total 4Q 2004</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>	<u>Total 3Q 2005</u>
Average Expenditure Per Visit								
Lodging	\$821	\$561	\$932	\$927	\$770	\$1,651	\$788	\$596
Restaurant/Bar	\$292	\$306	\$306	\$238	\$473	\$838	\$475	\$420
Gifts/Shopping	\$277	\$285	\$288	\$230	\$397	\$710	\$427	\$192
Entertainment/Recreation	\$68	\$30	\$122	\$49	\$108	\$147	\$145	\$136
Local Travel	\$140	\$93	\$151	\$180	\$203	\$435	\$202	\$164
Total Per Party	\$1,598	\$1,275**	\$1,800	\$1,624	\$2,000	\$3,902	\$2,052	\$1,570
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$615	\$472	\$667	\$649	\$769	\$1,501	\$789	\$581
Total Per Person/ Per Day	\$171	\$157	\$185	\$158	\$171	\$235	\$179	\$145
Lodging	\$88	\$69	\$96	\$90	\$66	\$99	\$69	\$55
Restaurant/Bar	\$31	\$38	\$31	\$23	\$40	\$50	\$42	\$39
Gifts/Shopping	\$30	\$35	\$30	\$22	\$34	\$43	\$37	\$18
Entertainment/Recreation	\$7	\$4	\$13	\$5	\$9	\$9	\$13	\$13
Local Travel	\$15	\$11	\$16	\$18	\$17	\$26	\$18	\$15

** Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey).

* 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 2005

Visitor Expenditures	Business							
	Total 3Q 2005	Oct.	Nov.	Dec.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Average Expenditure Per Visit								
Lodging	\$828	\$840	\$876	\$724	\$530	\$653	\$554	\$536
Restaurant/Bar	\$304	\$286	\$235	\$396	\$269	\$288	\$287	\$293
Gifts/Shopping	\$63	\$37	\$75	\$83	\$92	\$154	\$132	\$68
Entertainment/Recreation	\$30	\$37	\$26	\$25	\$31	\$74	\$59	\$46
Local Travel	\$142	\$136	\$142	\$155	\$160	\$166	\$145	\$167
Total Per Party	\$1,366	\$1,336**	\$1,354	\$1,382	\$1,097	\$1,353	\$1,187	\$1,117
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$804	\$786	\$797	\$813	\$645	\$712	\$698	\$657
Total Per Person/Per Day	\$244	\$231	\$275	\$226	\$190	\$223	\$212	\$173
Lodging	\$148	\$145	\$178	\$118	\$92	\$107	\$99	\$83
Restaurant/Bar	\$54	\$49	\$48	\$65	\$46	\$47	\$51	\$45
Gifts/Shopping	\$11	\$6	\$15	\$14	\$16	\$25	\$24	\$11
Entertainment/Recreation	\$5	\$6	\$5	\$4	\$5	\$12	\$11	\$7
Local Travel	\$25	\$24	\$29	\$25	\$28	\$27	\$26	\$26

** Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey).

* 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 2005

Planning the Trip to Palm Beach County	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Reason for Trip								
Conference/Convention/ Business Meeting	54.8%	59.1%	52.0%	53.2%	66.2%	46.2%	61.3%	51.8%
- Business Meeting	47.9%	48.7%	48.0%	46.9%	57.1%	41.6%	50.2%	46.1%
- Conference/Convention	5.1%	9.2%	3.2%	3.0%	7.9%	4.4%	10.3%	5.4%
- Other Business	1.8%	1.2%	0.8%	3.4%	1.2%	0.1%	0.8%	0.3%
Vacation/Pleasure	37.5%	34.9%	36.5%	41.2%	25.5%	44.0%	30.8%	40.5%
Sporting Event	3.1%	3.1%	5.0%	1.3%	2.8%	4.3%	3.1%	0.9%
Cultural Event/Attraction	0.3%	0.0%	0.0%	0.8%	0.2%	0.8%	0.4%	0.5%
Film/TV location scouting/production	0.1%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%	0.0%
Other	4.1%	2.9%	6.4%	3.2%	5.3%	4.7%	4.5%	6.3%
Who Made the Decision								
Employer	53.3%	60.8%	50.7%	48.5%	60.2%	43.0%	52.4%	46.3%
Head of Household/ Other adult	38.9%	29.8%	42.3%	44.6%	37.7%	55.3%	45.1%	51.7%
Family Living in PBC	8.1%	9.0%	6.9%	8.5%	N/A	N/A	N/A	N/A
Children Influenced Decision	2.1%	2.6%	3.2%	0.5%	2.2%	1.7%	2.5%	2.0%
Advanced Planning								
One Month or Less	50.5%	47.2%	51.3%	52.9%	56.8%	45.0%	52.6%	56.7%
2 to 3 Months	26.1%	31.7%	24.1%	22.5%	21.7%	25.2%	22.6%	20.9%
More than 3 Months	23.4%	21.2%	24.6%	24.6%	21.4%	29.8%	24.8%	22.4%

* Multiple responses accepted.



Hotel Survey: 4th Quarter 2005

Planning the Trip to Palm Beach County (Continued)	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	53.4%	57.4%	50.7%	51.9%	63.8%	47.5%	61.3%	52.1%
Visit Friends/Relatives	25.2%	20.0%	25.5%	30.1%	17.2%	27.3%	17.3%	24.1%
Convenient Flights	9.3%	6.4%	9.2%	12.5%	3.5%	6.8%	5.4%	4.7%
Previous Visit	9.1%	5.3%	9.9%	12.2%	9.3%	19.5%	10.9%	13.7%
Weather	7.5%	4.6%	9.2%	8.9%	5.4%	8.1%	5.1%	5.7%
Special Event	6.5%	8.7%	7.3%	3.4%	13.9%	9.1%	14.1%	11.1%
Beaches	4.0%	2.9%	5.1%	4.1%	3.2%	4.6%	4.6%	7.5%
Friends/Relatives recommendation	2.9%	3.0%	2.4%	3.2%	12.2%	15.7%	11.4%	17.3%
Golf/Tennis/Recreation	2.8%	0.0%	5.1%	3.4%	2.1%	4.5%	3.0%	4.3%
Attend Sporting Event	2.1%	1.3%	4.3%	0.8%	1.7%	3.5%	2.6%	1.0%
Compete in Sporting Event	1.5%	1.3%	2.2%	1.0%	0.8%	2.1%	0.8%	0.4%
Hotel Brochure/Website	1.4%	0.0%	1.4%	2.8%	2.1%	2.9%	3.5%	4.6%
Other Internet Sources	1.0%	2.3%	0.7%	0.0%	3.1%	2.6%	3.5%	7.3%
Attraction Brochure/Website	0.6%	0.0%	0.4%	1.5%	0.8%	0.9%	1.1%	1.1%
Bus Tour	0.5%	1.3%	0.0%	0.3%	N/A	N/A	N/A	N/A
Spanish Language Media	0.4%	0.9%	0.3%	0.0%	N/A	N/A	N/A	N/A
Art/Cultural Event	0.3%	0.0%	0.7%	0.3%	1.4%	2.6%	1.0%	1.2%
Spring Training	0.2%	0.0%	0.4%	0.3%	0.3%	2.3%	0.3%	0.0%
PBC-CVB Information/Website	0.1%	0.0%	0.3%	0.0%	0.8%	0.6%	0.4%	1.2%
Travel Agency	0.0%	0.0%	0.0%	0.0%	1.3%	1.1%	1.3%	1.4%
County/State Tourist Agency	0.0%	0.0%	0.0%	0.0%	0.2%	0.6%	0.3%	0.0%
Media Coverage	0.0%	0.0%	0.0%	0.0%	1.6%	1.4%	1.7%	3.6%
Other	5.7%	7.7%	6.0%	3.4%	11.7%	9.8%	11.7%	12.0%

* Multiple responses accepted.



Hotel Survey: 4th Quarter 2005

Planning the Trip to Palm Beach County (Continued)	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Booked Trip with Travel Agency								
Yes	21.4%	17.9%	22.1%	24.4%	26.9%	24.2%	21.7%	24.6%
No	78.6%	82.1%	77.9%	75.6%	73.1%	75.8%	78.3%	75.4%
Booked Any Part of Trip Using Internet								
Yes	52.5%	52.5%	47.8%	57.1%	42.9%	41.1%	43.7%	47.0%
No	47.5%	47.5%	52.2%	42.9%	57.1%	58.9%	56.3%	53.0%
Booked Any Part of Trip Using Internet* (among those who used the Internet)								
Air	78.3%	77.9%	81.2%	76.4%	77.3%	80.9%	76.1%	72.7%
Hotel	54.6%	51.4%	56.8%	55.8%	53.8%	55.0%	65.8%	65.6%
Hotel website	28.7%	22.4%	30.4%	33.4%	25.9%	27.1%	31.4%	31.5%
Expedia	4.0%	3.4%	7.1%	2.2%	6.5%	3.5%	3.9%	7.1%
hotels.com	1.8%	1.2%	2.8%	1.5%	2.8%	4.6%	2.0%	2.9%
Orbitz	1.8%	4.1%	0.0%	1.2%	1.1%	1.8%	3.6%	2.7%
Travelocity	1.5%	1.8%	0.0%	2.5%	1.5%	1.8%	1.3%	2.4%
Hotwire	0.3%	0.0%	0.0%	0.9%	0.9%	0.0%	0.3%	0.0%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	N/A	N/A	N/A	N/A
Other Website	3.8%	4.2%	2.8%	4.2%	3.3%	2.9%	2.6%	5.1%
Don't Remember	12.5%	14.3%	13.8%	9.9%	11.7%	13.3%	20.7%	14.0%
Car Rental	43.2%	44.6%	50.2%	36.2%	43.2%	47.1%	43.6%	43.7%
Tickets to Event	0.7%	0.0%	2.4%	0.0%	1.2%	1.1%	1.0%	1.2%
Other	4.6%	6.9%	1.2%	5.2%	3.5%	2.2%	1.6%	2.7%
Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)								
Yes	11.7%	10.5%	9.3%	15.4%	6.3%	10.3%	11.7%	12.4%
No	88.3%	89.5%	90.7%	84.6%	93.7%	89.7%	88.3%	87.6%
Type of Transportation**								
Airplane	83.5%	78.1%	86.8%	85.5%	76.4%	80.7%	72.8%	69.1%
Car	23.8%	28.1%	21.8%	21.6%	23.2%	18.9%	26.8%	30.7%
Other	1.0%	2.3%	0.7%	0.3%	0.4%	0.4%	0.3%	0.2%

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



Hotel Survey: 4th Quarter 2005

Characteristics of the Visit	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
<u>Main Destination</u>								
Palm Beach County	89.4%	92.6%	89.5%	86.0%	91.8%	90.3%	93.2%	90.4%
Ft. Lauderdale	5.4%	3.2%	6.1%	6.9%	4.0%	4.0%	2.8%	4.5%
<u>First Trip to PBC</u>								
	22.4%	20.8%	22.3%	24.1%	25.3%	25.9%	27.2%	27.8%
<u>Plan to Return to PBC</u>								
	80.8%	80.8%	78.1%	83.7%	80.0%	82.9%	82.0%	82.0%
<u>When do you plan on returning to PBC?</u>								
Within the next 3 months	34.7%	30.0%	38.2%	36.0%	34.3%	24.6%	28.4%	31.8%
Within the next 6 months	9.5%	8.6%	12.1%	7.9%	14.0%	11.5%	14.7%	13.8%
Within the next year	18.2%	14.7%	17.6%	22.1%	23.4%	30.7%	22.3%	23.5%
Within the next few years	5.9%	6.4%	5.1%	6.3%	8.6%	10.5%	10.7%	9.6%
Don't Know	31.7%	40.4%	27.0%	27.6%	19.6%	22.8%	23.8%	21.3%
<u>Influence of fuel cost</u>								
5 – Strong consideration	5.2%	5.9%	6.1%	3.6%	N/A	N/A	N/A	N/A
4	5.2%	4.2%	5.2%	6.3%	N/A	N/A	N/A	N/A
3	12.6%	10.0%	12.9%	14.9%	N/A	N/A	N/A	N/A
2	8.6%	6.8%	8.9%	10.1%	N/A	N/A	N/A	N/A
1 – No consideration at all	49.3%	51.0%	50.1%	46.8%	N/A	N/A	N/A	N/A
I don't make the decision	19.1%	22.1%	16.8%	18.3%	N/A	N/A	N/A	N/A
<u>Description of Travel Party*</u>								
Adult family members or friends	44.6%	42.0%	46.3%	45.5%	36.9%	52.8%	43.6%	43.0%
Self Only	28.7%	31.8%	28.3%	26.0%	33.1%	22.9%	32.2%	31.1%
Business Associates	25.5%	26.2%	22.6%	27.7%	28.6%	21.6%	21.8%	22.2%
Children <12 years of age	9.3%	8.0%	10.6%	9.3%	6.1%	9.3%	8.6%	11.5%
Grandchildren <12 years of age	1.3%	1.4%	1.4%	1.2%	0.7%	0.7%	0.8%	0.8%

* Multiple responses accepted.



Hotel Survey: 4th Quarter 2005

Characteristics of the Visit (Continued)	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Participation in Specific Activities*								
Restaurants	91.5%	91.7%	94.6%	88.1%	95.0%	95.3%	94.9%	93.1%
Shopping	40.0%	41.3%	38.9%	39.9%	38.7%	47.3%	36.9%	38.9%
Went to Beach	25.3%	29.8%	21.1%	24.8%	29.7%	39.6%	33.8%	36.8%
Swimming	12.8%	9.2%	17.4%	12.1%	7.8%**	7.4%**	12.9%**	13.6%**
Bars/Nightclubs	12.4%	9.6%	10.4%	17.3%	14.8%	12.3%	13.5%	17.0%
Golf, Tennis	10.5%	8.0%	10.3%	13.2%	9.2%	18.8%	9.8%	12.1%
Visited downtown West Palm Beach Attractions/City Place	8.7%	6.3%	8.5%	11.5%	9.3%	14.8%	7.3%	14.2%
Visited downtown Delray Beach Attractions	7.8%	3.6%	9.9%	10.1%	6.3%	13.0%	8.5%	11.4%
Visited Mizner Park/Boca Raton	7.5%	7.2%	8.5%	6.9%	6.7%	12.5%	7.4%	8.4%
Visited Wildlife Refuge	3.4%	0.8%	3.7%	5.7%	2.0%	4.2%	2.9%	3.0%
Attractions	3.1%	2.2%	3.2%	3.9%	3.3%	3.3%	4.3%	4.2%
Museums, Art galleries	3.0%	2.3%	3.1%	3.7%	2.4%	5.4%	3.1%	4.0%
Attended a Sporting Event	2.4%	1.7%	3.2%	2.5%	1.6%	3.1%	1.4%	0.4%
Gambling Cruise	1.8%	2.3%	0.0%	3.0%	1.8%	1.7%	1.9%	1.7%
Downtown at the Gardens	1.7%	1.7%	0.9%	2.5%	N/A	N/A	N/A	N/A
Boating	1.7%	1.0%	1.5%	2.5%	7.8%**	7.4%**	12.9%**	13.6%**
Fishing	1.7%	1.7%	2.0%	1.6%	7.8%**	7.4%**	12.9%**	13.6%**
Performing Arts (plays, concerts, dance)	1.5%	0.8%	2.2%	1.3%	1.4%	3.7%	1.9%	1.6%
Visited downtown Lake Worth	1.4%	1.0%	2.4%	0.7%	1.0%	2.7%	0.8%	1.4%
Visited Riviera Beach/Singer Island	1.4%	1.7%	0.4%	2.2%	2.1%	0.4%	0.7%	1.3%
Competed in Sports	1.2%	2.0%	0.8%	0.8%	0.6%	1.5%	1.2%	0.7%
Snorkeling	0.5%	0.0%	1.2%	0.3%	7.8%**	7.4%**	12.9%**	13.6%**
Surfing	0.4%	0.4%	0.3%	0.4%	7.8%**	7.4%**	12.9%**	13.6%**
Pari-mutuels	0.3%	0.4%	0.0%	0.6%	0.6%	0.6%	0.3%	0.7%
Kite Surfing	0.1%	0.0%	0.3%	0.0%	7.8%**	7.4%**	12.9%**	13.6%**
Diving	0.1%	0.0%	0.4%	0.0%	7.8%**	7.4%**	12.9%**	13.6%**
Palm Beach County Convention Center	0.0%	0.0%	0.0%	0.0%	1.8%	1.3%	0.0%	0.3%
Other	4.8%	2.4%	5.9%	5.6%	7.2%	7.9%	8.4%	5.4%

*Multiple responses accepted.

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



Hotel Survey: 4th Quarter 2005

Attitudes about Trip to Palm Beach County	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Things Liked Best – Top Mentions								
Climate/Weather	41.9%	30.8%	47.2%	47.4%	47.7%	54.5%	36.1%	22.1%
Beaches/Ocean	10.0%	14.9%	9.0%	6.5%	11.7%	8.9%	11.3%	16.4%
Beautiful Area/Nice Place	6.3%	7.9%	4.9%	6.2%	9.0%	7.0%	10.0%	11.2%
Visiting Friends/Relatives	5.8%	6.1%	6.7%	4.8%	3.8%	2.9%	3.4%	6.0%
Nice People	4.2%	6.7%	2.4%	3.6%	4.0%	3.5%	4.5%	5.7%
Hotel	3.7%	5.0%	2.1%	4.1%	1.7%	1.8%	3.1%	6.6%
Cleanliness	3.6%	4.0%	4.5%	2.4%	2.4%	3.0%	4.2%	4.1%
Everything	3.4%	4.4%	1.6%	4.3%	2.3%	0.8%	3.0%	1.4%
Restaurant	2.6%	1.7%	3.4%	2.6%	2.0%	2.4%	1.4%	3.5%
Relaxing Atmosphere	2.3%	1.6%	2.3%	3.0%	0.4%	1.8%	1.9%	3.0%
Shopping	1.7%	0.8%	1.7%	2.5%	2.5%	1.8%	3.5%	1.6%
Golf	1.5%	0.0%	3.2%	1.2%	0.4%	1.2%	1.9%	1.6%
Palm Trees/Vegetation	1.4%	2.8%	1.0%	0.5%	0.4%	0.5%	0.5%	1.6%
Other specific activity	1.1%	0.0%	1.3%	2.1%	1.1%	1.9%	1.2%	1.1%
Location	0.3%	0.9%	0.0%	0.0%	2.4%	1.0%	2.2%	2.1%
Other	10.1%	12.3%	8.4%	8.4%	8.4%	7.4%	12.3%	9.9%



Hotel Survey: 4th Quarter 2005

Attitudes about Trip to Palm Beach County	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Things Liked Least – Top Mentions								
Traffic/Bad Drivers	33.4%	30.8%	33.9%	35.0%	36.2%	37.9%	32.9%	23.3%
Humidity/Poor Weather	17.5%	19.9%	21.7%	11.3%	12.0%	11.0%	22.0%	19.7%
Expensive	5.2%	5.1%	6.0%	4.4%	5.7%	6.6%	6.9%	5.3%
Road Construction	3.6%	8.2%	1.5%	1.8%	6.3%	2.7%	3.0%	2.9%
Stay Was Too Short	3.5%	2.1%	2.5%	5.6%	1.9%	0.3%	1.5%	1.8%
Hotel (general)	3.4%	2.7%	5.0%	2.6%	2.4%	6.3%	2.4%	2.1%
Crowded	1.5%	0.0%	0.9%	3.3%	5.1%	7.0%	2.7%	2.7%
Service personnel have negative attitude	1.3%	2.4%	0.7%	0.9%	1.6%	0.9%	0.0%	0.0%
Unfriendly People	1.2%	2.1%	0.9%	0.7%	2.2%	1.8%	1.8%	1.8%
Lack of Directional Signs	1.2%	1.6%	0.6%	1.4%	1.5%	2.1%	1.5%	1.8%
Hurricane Damage	1.1%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Cost of Hotel	1.1%	0.0%	2.1%	0.9%	0.0%	0.6%	0.0%	0.3%
Appearance	0.8%	0.0%	0.7%	1.5%	0.7%	2.4%	1.2%	0.9%
Crime	0.7%	1.0%	1.0%	0.0%	0.8%	0.6%	0.3%	0.9%
Other	13.7%	6.6%	16.3%	17.0%	13.5%	13.5%	16.8%	15.0%
<u>Nothing liked least</u>	10.7%	15.2%	3.8%	13.4%	9.8%	6.3%	7.2%	22.1%



Hotel Survey: 4th Quarter 2005

Attitudes about Trip to Palm Beach County	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Suggestions for Improvement - Top Mentions								
Longer stay	17.2%	14.5%	12.9%	25.1%	N/A	N/A	N/A	N/A
Better weather	12.2%	9.2%	14.5%	12.3%	N/A	N/A	N/A	N/A
Improve traffic/Finish Construction on I-95	9.1%	7.1%	8.1%	12.3%	N/A	N/A	N/A	N/A
Come during vacation time	7.8%	5.7%	13.4%	2.9%	N/A	N/A	N/A	N/A
Better hotel	5.0%	0.0%	6.7%	7.6%	N/A	N/A	N/A	N/A
Less business and more partying/more free time	4.5%	1.4%	6.1%	5.3%	N/A	N/A	N/A	N/A
Lower prices	2.0%	2.8%	3.1%	0.0%	N/A	N/A	N/A	N/A
Nothing	13.9%	31.0%	3.6%	11.0%	N/A	N/A	N/A	N/A
Other	27.1%	29.8%	30.7%	22.5%	N/A	N/A	N/A	N/A



Hotel Survey: 4th Quarter 2005

Characteristics of Visitors	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
Age								
Under 35	16.4%	16.4%	16.4%	16.5%	15.7%	16.1%	15.2%	18.8%
35 to 54	53.4%	50.4%	53.3%	56.5%	58.5%	51.7%	59.2%	57.8%
55 to 64	23.4%	25.9%	25.4%	18.8%	19.8%	18.8%	17.1%	18.0%
65 +	6.8%	7.2%	4.9%	8.2%	6.0%	13.5%	8.5%	5.4%
Occupation								
Prof/Managerial	65.3%	66.5%	64.0%	65.5%	52.2%	50.5%	56.4%	53.4%
Sales	16.5%	15.5%	18.4%	15.6%	18.9%	16.5%	15.0%	14.9%
Retired	8.1%	10.2%	6.8%	7.2%	7.1%	13.7%	9.0%	7.0%
Technical	5.7%	4.6%	6.5%	5.9%	8.9%	4.5%	5.5%	7.7%
Student	0.8%	1.0%	0.0%	1.3%	0.4%	0.8%	0.4%	1.6%
Other	3.6%	2.2%	4.2%	4.5%	12.5%	13.7%	13.7%	15.3%
Hispanic Origin	5.5%	5.7%	4.9%	5.9%	N/A	N/A	N/A	N/A
Ethnicity								
White/Caucasian	93.1%	91.5%	94.6%	93.4%	93.7%	94.3%	92.4%	90.8%
African-American/Black	3.2%	3.0%	2.7%	3.8%	3.7%	3.1%	4.8%	6.5%
Asian	3.1%	4.5%	2.2%	2.4%	2.6%	2.5%	2.3%	2.5%
Other	0.6%	1.0%	0.4%	0.4%	0.0%	0.1%	0.3%	0.2%



Hotel Survey: 4th Quarter 2005

Characteristics of Visitors (Continued)	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
<u>Income</u>								
Under \$45,000	3.2%	3.6%	3.3%	2.8%	3.9%	3.2%	5.5%	6.6%
\$45,000 to \$64,999	7.7%	9.3%	4.3%	9.4%	8.9%	7.9%	7.9%	10.9%
\$65,000 to \$99,999	22.0%	26.5%	19.2%	20.1%	28.9%	22.6%	21.3%	21.9%
\$100,000 to \$200,000	40.7%	37.1%	43.8%	41.3%	36.3%	38.3%	41.9%	37.8%
Over \$200,000	26.4%	23.5%	29.4%	26.4%	21.9%	28.0%	23.4%	22.9%
<u>Gender</u>								
Male	54.7%	44.2%	56.5%	63.6%	54.3%	57.3%	57.1%	56.6%
Female	45.3%	55.8%	43.5%	36.4%	45.7%	42.7%	42.9%	43.4%



Hotel Survey: 4th Quarter 2005

Place of Origin	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
<u>Domestic</u>	88.7% (n=648)	93.7%	86.0%	86.5%	90.2%	90.4% (n=666)	92.2% (n=687)	90.1% (n=664)
Southeast	18.3% (n=134)	18.8%	19.6%	16.5%	15.7%	14.3% (n=105)	16.2% (n=121)	16.6% (n=122)
Midwest	15.2% (n=111)	18.5%	11.1%	15.9%	17.0%	16.6% (n=122)	16.0% (n=119)	12.6% (n=93)
Florida	14.5% (n=106)	20.9%	13.8%	8.8%	16.4%	8.4% (n=62)	20.6% (n=153)	23.4% (n=172)
Mid Atlantic	14.2% (n=104)	9.8%	17.0%	16.0%	13.7%	17.3% (n=128)	12.2% (n=91)	13.0% (n=96)
New York	12.6% (n=92)	12.8%	10.7%	14.3%	11.7%	15.8% (n=116)	10.5% (n=78)	9.9% (n=73)
Far West	8.0% (n=58)	9.0%	7.4%	7.6%	7.7%	7.7% (n=57)	8.5% (n=63)	7.3% (n=54)
New England	5.9% (n=43)	3.8%	6.5%	7.4%	7.9%	10.3% (n=76)	8.1% (n=60)	7.2% (n=53)
<u>International</u>	11.3% (n=83)	6.3%	14.0%	13.5%	9.8%	9.6% (n=70)	7.8% (n=58)	9.9% (n=73)
Europe (net)	6.8% (n=50)	3.0%	8.1%	9.3%	5.5%	4.9% (n=36)	4.0% (n=30)	4.5% (n=33)
- England/UK	3.2% (n=23)	2.6%	4.3%	2.7%	2.7%	2.7% (n=20)	2.3% (n=17)	3.2% (n=23)
- Germany	1.2% (n=9)	0.4%	1.8%	1.5%	1.2%	0.9% (n=6)	0.5% (n=4)	0.4% (n=3)
Canada	1.9% (n=14)	1.8%	2.3%	1.7%	2.6%	2.5% (n=19)	2.4% (n=18)	1.6% (n=12)
Latin America / Caribbean	1.6% (n=12)	0.4%	2.0%	2.5%	0.9%	1.1% (n=8)	1.1% (n=8)	3.1% (n=23)
Australia/Asia	0.5% (n=4)	1.2%	0.4%	0.0%	0.7%	0.8% (n=6)	0.0% (n=0)	0.1% (n=1)
Middle East	0.4% (n=3)	0.0%	1.3%	0.0%	0.0%	0.1% (n=1)	0.3% (n=2)	0.4% (n=3)
Africa	0.0% (n=0)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1% (n=1)



Hotel Survey: 4th Quarter 2005

Pleasure Vs. Business By Selected Place of Origin	Total 4Q 2005	Oct.	Nov.	Dec.	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005
<u>Southeast</u>	18.3%	18.8%	19.6%	16.5%	15.7%	14.3%	16.2%	16.6%
Business	13.4%	13.4%	14.4%	12.1%	12.9%	9.4%	11.1%	10.9%
Pleasure	4.8%	5.1%	4.9%	4.5%	2.7%	4.8%	4.8%	5.6%
<u>Midwest</u>	15.2%	18.5%	11.1%	15.9%	17.0%	16.6%	16.0%	12.6%
Business	7.3%	8.9%	3.9%	9.0%	11.8%	7.3%	11.3%	6.9%
Pleasure	7.6%	8.9%	7.4%	6.6%	5.2%	9.1%	4.7%	5.7%
<u>Florida</u>	14.5%	20.9%	13.8%	8.8%	16.4%	8.4%	20.6%	23.4%
Business	9.4%	12.7%	9.5%	5.9%	13.1%	6.4%	14.6%	12.6%
Pleasure	4.9%	8.3%	4.2%	2.8%	3.2%	2.0%	5.6%	10.4%
<u>Mid Atlantic</u>	14.2%	9.8%	17.0%	16.0%	13.7%	17.3%	12.2%	13.0%
Business	6.3%	4.5%	8.5%	6.3%	7.6%	5.8%	4.4%	4.9%
Pleasure	7.9%	5.7%	8.5%	9.7%	5.9%	11.5%	7.4%	7.9%
<u>New York</u>	12.6%	12.8%	10.7%	14.3%	11.7%	15.8%	10.5%	9.9%
Business	4.3%	5.7%	2.8%	4.5%	4.8%	4.3%	4.7%	3.3%
Pleasure	8.1%	7.6%	7.4%	9.7%	6.7%	11.3%	5.8%	6.6%
<u>Far West</u>	8.0%	9.0%	7.4%	7.6%	7.7%	7.8%	8.5%	7.3%
Business	5.7%	7.6%	4.6%	4.5%	6.3%	5.7%	6.6%	4.6%
Pleasure	2.3%	1.3%	2.8%	2.8%	1.3%	1.9%	1.9%	2.7%
<u>New England</u>	5.9%	3.8%	6.5%	7.4%	7.9%	10.3%	8.1%	7.2%
Business	2.2%	1.9%	1.8%	2.8%	4.6%	4.2%	3.9%	3.5%
Pleasure	3.7%	1.9%	4.6%	4.9%	3.2%	5.7%	4.2%	3.7%