



# Report on Palm Beach County Tourism First Quarter 2006 (January, February and March)

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# Introduction: 1<sup>st</sup> Quarter 2006

## Background

- The following report contains information collected during the 1<sup>st</sup> Quarter 2006 (January, February and March 2006), the second 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: 1<sup>st</sup> Quarter 2006

## Occupancy Rates

- **The average occupancy rate for the first quarter of 2006 was 84.7% - a 3.6 percentage point decrease compared to the same quarter last year (88.3%), and 11.6 percentage points higher than the prior quarter (73.1%).**
  - Overall, Palm Beach County participating hotels reported the highest occupancy rates during the month of March (87.1%), and the lowest during the month of January (79.7%).
  - In 1Q2006, the average occupancy rate among properties with 50-100 rooms (88.1%) was higher than the average occupancy rate among properties with more than 100 rooms (84.1%).
- **In terms of geographic area, the average occupancy rate was 85.6% among hotels in the Southern region, 84.5% among hotels in the Central Region and 83.4% among hotels in the Northern region.**
  - In the first quarter of 2006, all regions reported decreases in occupancy rates compared to the same quarter in 2005 (86.5% Northern, 90.0% Central and 87.7% Southern) and increases compared to last quarter (73.8% Northern, 74.3% Central and 71.5% Southern).
- **An estimated 1,138,435 Palm Beach County hotel room nights were occupied\* during the first quarter of 2006 – a decrease of 35,424 room nights compared to 1Q2005 (1,173,859) and an increase of 181,487 compared to the previous quarter (956,948).**
- **According to hotel managers who reported the percentage of guests from other countries, on average, during 1Q2006, 4.5% of hotel guests were international.**
  - The percentage of international guests was higher among smaller hotels (50-100 rooms, 11.5%) than among larger hotels (100 + rooms, 3.1%) in 1Q2006.
  - Among larger properties, those with 101-219 rooms claimed that 4.0% of their guests came from abroad, while hotels with 220-500 rooms reported that 1.5% were international.
  - Based on the hotels who responded, the percentage of international guests staying at hotels in the Southern region was 5.7%. This is comparable to the percentage of international guests staying in the Central region (5.2%) and higher than the percentage of those who chose Northern Palm Beach County hotels (1.4%).
- **According to surveyed property managers, more hotel rooms in 1Q2006 were occupied by leisure travelers (40.4%) than business (34.5%) or convention/group (25.2%) travelers.**
- **Conference/convention bookings represented 30.5% of occupied room nights at designed convention hotels. This is comparable to 1Q2005 (31.6%) but represents a decrease of 4.9 percentage points compared to last quarter (35.4%).**

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



# Property Manager Survey: 1<sup>st</sup> Quarter 2006

## Average Daily Room Rate (ADR)

- **Surveyed Palm Beach County hotels reported an average daily room rate (ADR) in 1Q2006 of \$204.12 – this is comparable to the ADR reported in the first quarter of last year (\$206.84) and 48.1% higher than the ADR reported last quarter (\$137.81).**
  - The ADR was highest in February (\$222.86) and lowest in January (\$185.46).
  - The ADR among larger properties (101+ rooms, \$211.07) was about the same as the ADR reported by larger properties in 1Q2005 (\$211.33), while the ADR among smaller properties (50-100 rooms, \$164.79) decreased by 8.6% compared to 1Q2005 (\$180.22).
  - Among larger properties, hotels with 101-219 rooms reported an ADR of \$154.43 and hotels with 220-500 rooms reported an ADR of \$220.64.

## Future Business Outlook

- **One-half of surveyed property managers (51.2%) expected an increase in hotels' room revenue for succeeding months as compared to the same months in 2005. One-quarter (25.7%) predicted decrease and 23.0% expected no change in room revenue compared to one year ago.**
  - Among property managers who anticipated an increase in room revenue compared to the previous year, the average increase expected was 8.4%.
  - Among property managers expecting a decrease in room revenue compared to the previous year, the average decrease expected was 11.2%.

## Bookings Via Third Party Websites

- **The percentage of 1Q2006 bookings sold via third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc) was 11.1%. This is comparable with both 1Q2005 (12.4%) and 4Q2005 (10.6%).**
  - Smaller properties (50-100 rooms) reported a higher percentage of bookings sold through third party websites (15.9%) than larger properties (101+ rooms) (8.7%).



# Hotel Visitor Survey: 1<sup>st</sup> Quarter 2006

## Characteristics of Stay

- In 1Q2006, the average party size of surveyed hotel guests was 2.1\*, the same as last quarter and slightly lower than in the same quarter last year (2.3). The median party size for 1Q2006 and for all months within the quarter was 2.0.
- Surveyed visitors spent, on average, 4.4 nights in a hotel and occupied an average of 1.3 rooms per night\*.
- During the first quarter of 2006, more than one-half (55.4%) of surveyed visitors described themselves as business travelers (conference/convention/business meeting), while 36.3% considered themselves leisure travelers.
  - The percentage of business travelers was highest during the month of February (64.0%), while the percentage of vacationers was highest in the month of January (42.0%).
  - The percentages of business and leisure travelers in 1Q2006 were comparable to last quarter (54.8% business and 37.5%, leisure). Compared to the same quarter last year, the percentage of business travelers increased by 9.2 percentage points (from 46.2% to 55.4%), while the percentage of vacationers decreased by 7.7 percentage points (from 44.0% in 1Q2005 to 36.3% in 1Q2006).

## Planning the Trip to Palm Beach County

- When asked why they selected PBC over other destinations, 1Q2006 hotel guests most often cited a 'work related trip' (55.9%), followed by 'visit friends/relatives' (21.1%), 'previous visits' (10.9%) and the 'weather' (9.8%).
  - Compared to 4Q2005 and 1Q2005, mention of 'work related trip' (55.9%) increased by 2.5 and 8.4 percentage points, respectively (53.4% in 4Q2005, 47.5% in 1Q2005).
- In 1Q2006, one-half of surveyed guests (50.6%) planned their trip to Palm Beach County one month or less in advance. This is about the same as last quarter (50.5%) and represents an increase of 5.6 percentage points compared to 1Q2005 (45.0%).
- Just over one-half of respondents (54.9%) reported that their employer made the decision about the trip to PBC (an 11.9 percentage point increase compared to 1Q2005, 43.0%), while 41.1% claimed that the decision was made by the head of the household/other adult (a 14.2 percentage point decrease compared to 1Q2005, 55.3%).

## Booking a Trip to Palm Beach County

- Over one-quarter of surveyed visitors reported using a Travel Agent (26.1%) to book part of their trip to PBC in 1Q2006 (an increase of 4.7 and 1.9 percentage points compared to 4Q2005 ((21.4%)) and 1Q2005 ((24.2%)), respectively).
  - Use of a travel agent to book part of visitors trip was highest in February 2006 (30.8%).

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



# Hotel Visitor Survey: 1<sup>st</sup> Quarter 2006

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

- During the first quarter of 2006, 44.1% of respondents reported using the Internet to book part of their trip to PBC. This represents a decrease of 8.4 percentage points compared to last quarter (52.5%) and an increase of 3.0 percentage points compared to 1Q2005 (41.1%).
  - Among those hotel guests who used the Internet to book part of their trip, most used it to book airfare (79.2%), hotel rooms (55.2%), and/or car rentals (38.7%).
  - Use of hotel websites directly to book accommodations in 1Q2006 (31.8%) increased by 3.1 percentage points compared 4Q2005 (28.7%) and by 4.7 percentage points compared to 1Q2005 (27.1%).
  - Use of the Internet to book car rentals (38.7%) has decreased by 4.5 percentage points compared to last quarter (43.2%) and by 8.4 percentage points compared to 1Q2005 (47.1%)
  - One-in-ten (10.3%) respondents reported that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meal, rental car, etc). This is relatively comparable with 4Q2005 (11.7%) and is the same as in 1Q2005 (10.3%).
  - The majority of surveyed visitors arrived in PBC by air during 1Q2006 (81.8%) – this is comparable with both 4Q2005 (83.5%) and 1Q2005 (80.7%).

## Visitor Expenditures

- **The average per party\* expenditure in Palm Beach County in the first quarter of 2006 was \$2,451. This represents an increase of \$992 (68.0%) compared to last quarter (\$1,459) and a decrease of \$107 (4.2%) compared to the first quarter last year (\$2,558).**
  - All spending categories experienced decreases compared to the same quarter last year except for Lodging (from \$1,132 to \$1,461, an increase of \$329 or 29.1%).
  - Both the average per person (\$1,167) and the average per person/day (\$265) expenditures increased compared to last quarter (\$695 per person and \$204 per person/day in 4Q2005, increases of 67.9% and 29.9%, respectively) and the same quarter last year (\$1,112 per person and \$227 per person/day in 1Q2005, increases of 4.9% and 16.7%, respectively).
- **The average per party expenditure among vacationers in 1Q2006 was \$3,318 while the average per party expenditure among business travelers was \$1,758.**
  - While business travelers expenditures (per party) increased by 29.9% compared to the same quarter last year (from \$1,353 to \$1,758) vacationers' expenditures (per party) decreased by 15.0% compared to 1Q2005 (from \$3,902 to \$3,318).

## Characteristics of Visit

- In 1Q2006, over one-quarter of surveyed hotel guests (26.7%) reported that they were first time visitors to Palm Beach County. This represents an increase of 4.3 percentage points compared to 4Q2005 (22.4%) and is at parity with the same time last year (25.9%).

\* 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.



# Hotel Visitor Survey: 1<sup>st</sup> Quarter 2006

## Characteristics of Visit (Continued)

- **The majority of surveyed hotel guests (78.1%) affirmed that they plan to return to Palm Beach County some time in the future.**
  - Among those who plan to visit Palm Beach County in the future, approximately three-quarters (64.7%) plan to do so in the next year; 26.2% within the next three months.
- **When asked about the activities visitors participated in while visiting Palm Beach County in 1Q2006, the most frequently mentioned were eating at area restaurants (92.4%), shopping (38.9%), going to the beach (26.3%) and golf/tennis (18.8%).**
  - Compared to the same quarter last year, there were noticeable decreases in the percentage of visitors who mentioned 'shopping' (from 47.3% to 38.9%, an 8.4 percentage point decrease) and 'going to the beach' (from 39.6% to 26.3%, a 13.3 percentage point decrease).
- Compared to 4Q2005, the percentage of those who stated 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) increased by 5.0 percentage points (from 57.9% to 62.9%).

## Attitudes toward Palm Beach County

- **In 1Q2006, visitors continued to report that the aspects of their trip to PBC they liked best were 'climate/weather' (49.5%), 'beaches' (7.9%) and 'beautiful area' (5.6%).**
  - The percentage of those who mentioned 'climate/weather' increased by 7.6 percentage points compared to last quarter (41.9%) and decreased by 5.0 percentage points compared to 1Q2005 (54.5%).
- **'Traffic/bad drivers' was the aspect visitors liked least about their trip to PBC in 1Q2006 (40.2%), followed by 'humidity/poor weather' (9.7%) and 'expensive' (4.7%).**
  - The percentage of those who mentioned 'traffic/bad drivers' increased by 6.8 percentage points compared to last quarter (33.4%) and by 2.3 percentage points compared to 1Q2005 (37.9%).
- As seen last quarter, surveyed visitors reported that a longer stay (18.4%), better weather (18.0%) and traffic improvements/finish construction on I-95 (10.0%) would make their next trip to PBC better.

## Characteristics of Visitors

- The majority of respondents described themselves as White/Caucasian (94.4%), 60.7% had professional/managerial jobs, and almost seven-in-ten (69.4%) have an annual household income of \$100,000 or greater.
- In 1Q2006, visitors were more likely to have traveled with adult family members/friends (47.4%) or alone (28.8%).
- Over nine-in-ten were domestic travelers (92.2%) and the remaining 7.8% were international visitors.



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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: 1<sup>st</sup> Quarter 2006

	<u>Total 1Q 2006</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>	<u>Total 3Q 2005</u>	<u>Total 4Q 2005</u>
<b>Occupancy Rate</b>								
Month/Quarter	84.7%	79.7%	86.3%	87.1%	88.3%	72.7%	63.0%	73.1%
FYTD (Oct. - Set.)	78.4%	74.3%	76.7%	78.4%	84.1%	80.2%	76.0%	72.4%
<b>Room Nights Occupied<sup>1*</sup></b>								
Month/Quarter	1,138,435	371,569	363,282	403,584	1,173,859+	969,020+	862,035+	956,948+
FYTD (Oct. - Set.)	2,095,383	1,328,517	1,691,799	2,095,383	2,226,221+	3,195,241+	4,057,276+	956,948+
<b>Percentage of Room Nights Occupied</b>								
Leisure	40.4%	36.1%	44.4%	39.3%	42.1%	35.0%	36.2%	35.4%
Business	34.5%	35.3%	33.0%	35.1%	31.8%	34.7%	37.8%	34.7%
Convention/Group	25.2%	28.6%	22.6%	25.6%	26.1%	30.3%	26.0%	30.0%
<b>Average Daily Room Rate<sup>2</sup></b>	\$204.12	\$185.46	\$222.86	\$199.94	\$206.84	\$143.81	\$107.76	\$137.81

+ 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: 1<sup>st</sup> 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>
1st Quarter (Jan/Feb/Mar)	N/A	N/A	N/A	76.2	77.9	83.8	88.3	84.7
January	74.0	71.9	74.7	69.0	71.3	74.2	84.0	79.7
February	83.1	85.7	85.5	81.4	81.7	88.8	91.1	86.3
March	80.9	83.5	84.9	79.7	81.4	88.4	89.9	87.1
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
4th Quarter (Oct/Nov/Dec)	N/A	N/A	N/A	57.5	59.8	64.2	79.8	73.1
<b>Fiscal YTD (Oct. – Mar.)</b>	<b>66.7</b>	<b>68.8</b>	<b>67.3</b>	<b>64.1</b>	<b>65.7</b>	<b>70.9</b>	<b>76.0</b>	<b>78.4</b>
<b>Number of Room Nights Occupied in 1st Quarter*</b>							1,173,859+	1,138,435

+ 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: 1<sup>st</sup> Quarter 2006

	<u>Total 1Q 2006</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>	<u>Total 3Q 2005</u>	<u>Total 4Q 2005</u>
<b>Conference/Convention Bookings</b>								
<u>All Hotels</u>								
% Occupied Room Nights in County	25.2%	28.6%	22.6%	25.6%	26.1%	30.3%	26.0%	30.0%
Occupied Room Nights in County	291,689	106,269	82,102	103,318	307,071	295,390	243,936	302,473+
Occupied Room Nights in County FYTD (Oct.- Sept.)	594,162	408,742	490,844	594,162	593,961	889,351	1,133,287	302,473+
<u>Convention Hotels</u>								
% Occupied Room Nights	30.5%	34.8%	27.5%	30.5%	31.6%	37.9%	30.9%	35.4%
Occupied Room Nights	213,289	77,771	60,354	75,164	180,909	185,481	134,005	157,068+
Occupied Room Nights FYTD (Oct.- Sept.)	370,357	234,839	295,193	370,357	350,514	535,995	670,000	157,068+
<b>Available Inventory*</b>								
Rooms in County	45,020	15,039	15,034	14,947	44,356	44,083	44,499	43,083+
Room Nights	1,350,518	466,209	420,952	463,357	1,330,519+	1,337,086+	1,364,636+	1,321,198+
Room Nights FYTD (Oct.- Sept.)	2,671,716	1,787,407	2,208,359	2,671,716	2,651,180+	3,988,266+	5,352,902+	1,321,198+
<b>Response Rate</b>								
Month/Quarter (for all hotels in County)	59.7%	55.0%	64.2%	60.0%	66.8%	63.1%	62.9%	55.1%
FYTD (Oct.- Sept.)	57.4%	55.1%	56.9%	57.4%	67.2%	65.8%	65.1%	55.1%

+ 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: 1<sup>st</sup> Quarter 2006

Occupancy Rate	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Size of Hotel</b>								
50 - 100 Rooms	88.1%	83.4%	93.0%	88.3%	87.4%	66.7%	63.5%	75.7%
101 + Rooms	84.1%	79.0%	85.2%	87.0%	88.5%	73.8%	63.1%	72.6%
101-219	84.5%	78.7%	85.6%	87.1%	89.9%	73.1%	66.0%	75.7%
220-500	82.4%	76.9%	82.9%	87.7%	86.2%	73.7%	58.6%	70.1%
All Properties	84.7%	79.7%	86.3%	87.1%	88.3%	72.7%	63.0%	73.1%
<b>Geographic Region</b>								
North	83.4%	80.3%	80.4%	89.4%	86.5%	71.3%	61.3%	73.8%
Central	84.5%	76.9%	88.3%	87.2%	90.0%	75.5%	68.2%	74.3%
South	85.6%	82.1%	87.8%	85.8%	87.7%	70.8%	58.7%	71.5%

<u>What percent of your occupancy is international?</u>	Total 1Q 2006	January	February	March
<b>Size of Hotel</b>				
50-100 Rooms	11.5%	15.4%	14.3%	3.9%
101 + Rooms	3.1%	2.7%	3.3%	3.1%
101-219	4.0%	3.7%	4.4%	3.7%
220-500	1.5%	1.7%	1.4%	1.5%
Total Hotel Size	4.5%	5.2%	4.7%	3.4%
<b>Geographic Region</b>				
North	1.4%	2.2%	0.8%	1.5%
Central	5.2%	6.7%	5.4%	3.2%
South	5.7%	5.8%	6.5%	4.5%



# Property Manager Survey: 1<sup>st</sup> Quarter 2006

Average Daily Room Rate	Total <u>1Q 2006</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	Total <u>1Q 2005</u>	Total <u>2Q 2005</u>	Total <u>3Q 2005</u>	Total <u>4Q 2005</u>
<b><u>Size of Hotel</u></b>								
<u>50 - 100 Rooms</u>	\$164.79	\$149.56	\$177.37	\$167.60	\$180.22	\$125.42	\$103.02	\$119.38
<u>101 + Rooms</u>	\$211.07	\$192.61	\$230.72	\$204.77	\$211.33	\$146.79	\$108.85	\$141.57
101-219	\$154.43	\$132.60	\$180.28	\$138.00	\$163.97	\$112.43	\$91.61	\$109.19
220-500	\$220.64	\$202.83	\$229.09	\$229.83	\$212.75	\$150.23	\$107.56	\$147.65
<u>All Properties</u>	\$204.12	\$185.46	\$222.86	\$199.94	\$206.84	\$143.81	\$107.76	\$137.81



# Property Manager Survey: 1<sup>st</sup> Quarter 2006

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
<b>1Q</b>		
2004	1,186,693	
2005	1,173,859+	- 1.1
2006	1,138,435	- 3.0
<b>January</b>		
2004	364,099	
2005	382,241+	5.0
2006	371,569	- 2.8
<b>February</b>		
2004	391,310	
2005	378,098+	-3.4
2006	363,282	- 3.9
<b>March</b>		
2004	431,284	
2005	413,520+	- 4.1
2006	403,584	- 2.4
<b>2Q</b>		
2004	1,022,634	
2005	969,020+	- 5.2
2006		
<b>3Q</b>		
2004	859,630	
2005	862,035+	0.3
2006		
<b>4Q</b>		
2004	1,052,362+	
2005	956,948+	- 9.1
2006		
<b>FYTD (October – March)</b>		
2004	2,120,748	
2005	2,226,221+	5.0
2006	2,095,383	- 5.9

+ 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: 1<sup>st</sup> Quarter 2006

Future Business Outlook (for each month as compared to the same month in previous year)	<u>Total Room Revenue</u>	<u>Group/Indiv. Business Room Revenue</u>	<u>Individual Vacation Room Revenue</u>
<b>February 2006 / March 2006 predictions from January</b>			
<b>Foresee Decrease</b>	16.4%	16.4%	17.9%
Average decrease (among those who foresee decrease)	9.2%	7.5%	7.9%
<b>Foresee No Change</b>	21.7%	32.8%	24.9%
<b>Foresee Increase</b>	62.0%	50.8%	57.2%
Average increase (among those who foresee increase)	6.3%	8.5%	6.0%
<b>March 2006 / April 2006 predictions from February</b>			
<b>Foresee Decrease</b>	23.1%	19.8%	18.1%
Average decrease (among those who foresee decrease)	9.8%	14.5%	9.2%
<b>Foresee No Change</b>	21.8%	34.3%	35.7%
<b>Foresee Increase</b>	55.1%	45.9%	46.2%
Average increase (among those who foresee increase)	10.7%	8.9%	6.4%
<b>April 2006 / May 2006 predictions from March</b>			
<b>Foresee Decrease</b>	38.0%	35.9%	36.1%
Average decrease (among those who foresee decrease)	13.1%	15.0%	10.4%
<b>Foresee No Change</b>	26.6%	34.2%	34.0%
<b>Foresee Increase</b>	35.4%	30.0%	29.9%
Average increase (among those who foresee increase)	7.8%	8.3%	7.5%
<b>First Quarter predictions from January, February and March</b>			
<b>Foresee Decrease</b>	25.7%	23.4%	23.4%
Average decrease (among those who foresee decrease)	11.2%	13.7%	9.5%
<b>Foresee No Change</b>	23.0%	33.5%	32.6%
<b>Foresee Increase</b>	51.2%	43.1%	44.1%
Average increase (among those who foresee increase)	8.4%	8.7%	6.5%



# Property Manager Survey: 1<sup>st</sup> Quarter 2006

Bookings via third party website	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Size of Hotel</b>								
<u>50 - 100 Rooms</u>	15.9%	14.4%	19.9%	11.8%	17.8%	18.8%	17.1%	14.3%
<u>101 + Rooms</u>	8.7%	8.3%	7.9%	9.9%	11.0%	10.4%	11.2%	8.0%
101-219	9.7%	9.5%	8.4%	10.9%	11.8%	11.5%	11.2%	9.1%
220-500	5.3%	5.7%	5.2%	4.8%	8.4%	7.0%	13.2%	2.6%
<u>All Properties</u>	11.1%	11.6%	11.4%	10.3%	12.4%	12.9%	12.9%	10.6%



# 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: 1<sup>st</sup> Quarter 2006

Characteristics of Stay	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
Average Party Size *	2.1	2.2	2.1	2.0	2.3	2.1	2.2	2.1
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	4.7	4.1	4.1	5.6	5.3	3.8	4.0	3.7
Nights in Hotel	4.4	4.0	4.1	5.1	4.9	3.7	3.9	3.4
Rooms per Night *	1.3	1.3	1.3	1.3	1.3	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: 1<sup>st</sup> Quarter 2006

Visitor Expenditures	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Average Expenditure Per Visit</b>								
Lodging	\$1,461	\$1,336	\$1,451	\$1,591	\$1,132	\$636	\$566	\$823
Restaurant/Bar	\$519	\$480	\$500	\$571	\$544	\$352	\$347	\$296
Gifts/Shopping	\$158	\$196	\$119	\$158	\$407	\$233	\$125	\$153
Entertainment/Recreation	\$106	\$116	\$139	\$51	\$113	\$85	\$86	\$48
Local Travel	\$207	\$204	\$201	\$209	\$294	\$167	\$164	\$139
<b>Total Per Party</b>	<b>\$2,451</b>	<b>\$2,332</b>	<b>\$2,411</b>	<b>\$2,581</b>	<b>\$2,558</b>	<b>\$1,484</b>	<b>\$1,319</b>	<b>\$1,459</b>
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$1,167	\$1,060	\$1,148	\$1,290	\$1,112	\$706	\$600	\$695
Total Per Person/Per Day	\$265	\$265	\$280	\$253	\$227	\$191	\$154	\$204
Lodging	\$158	\$152	\$169	\$156	\$100	\$82	\$66	\$115
Restaurant/Bar	\$56	\$55	\$58	\$56	\$48	\$45	\$40	\$41
Gifts/Shopping	\$17	\$22	\$14	\$16	\$36	\$30	\$15	\$21
Entertainment/Recreation	\$11	\$13	\$16	\$5	\$10	\$11	\$10	\$7
Local Travel	\$22	\$23	\$23	\$21	\$26	\$21	\$19	\$20

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

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





# Hotel Survey: 1<sup>st</sup> Quarter 2006

Visitor Expenditures	<u>Pleasure</u>							
	<u>Total 1Q 2006</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>	<u>Total 3Q 2005</u>	<u>Total 4Q 2005</u>
<b>Average Expenditure Per Visit</b>								
Lodging	\$2,040	\$1,654	\$2,172	\$2,268	\$1,651	\$788	\$596	\$821
Restaurant/Bar	\$588	\$489	\$684	\$598	\$838	\$475	\$420	\$292
Gifts/Shopping	\$294	\$306	\$252	\$288	\$710	\$427	\$192	\$277
Entertainment/Recreation	\$126	\$141	\$120	\$101	\$147	\$145	\$136	\$68
Local Travel	\$270	\$226	\$318	\$266	\$435	\$202	\$164	\$140
<b>Total Per Party</b>	<b>\$3,318</b>	<b>\$2,815</b>	<b>\$3,546</b>	<b>\$3,521</b>	<b>\$3,902</b>	<b>\$2,052</b>	<b>\$1,570</b>	<b>\$1,598</b>
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$1,383	\$1,083	\$1,542	\$1,467	\$1,501	\$789	\$581	\$615
Total Per Person/ Per Day	\$230	\$230	\$257	\$204	\$235	\$179	\$145	\$171
Lodging	\$142	\$135	\$157	\$131	\$99	\$69	\$55	\$88
Restaurant/Bar	\$41	\$40	\$50	\$35	\$50	\$42	\$39	\$31
Gifts/Shopping	\$20	\$25	\$18	\$17	\$43	\$37	\$18	\$30
Entertainment/ Recreation	\$9	\$12	\$9	\$6	\$9	\$13	\$13	\$7
Local Travel	\$19	\$18	\$23	\$15	\$26	\$18	\$15	\$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: 1<sup>st</sup> Quarter 2006

Visitor Expenditures	Business							
	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Average Expenditure Per Visit</b>								
Lodging	\$1,030	\$1,024	\$1,094	\$992	\$653	\$554	\$536	\$828
Restaurant/Bar	\$414	\$429	\$397	\$442	\$288	\$287	\$293	\$304
Gifts/Shopping	\$79	\$102	\$71	\$70	\$154	\$132	\$68	\$63
Entertainment/Recreation	\$82	\$74	\$130	\$22	\$74	\$59	\$46	\$30
Local Travel	\$154	\$173	\$152	\$144	\$166	\$145	\$167	\$142
Total Per Party	\$1,758	\$1,802	\$1,845	\$1,670	\$1,353	\$1,187	\$1,117	\$1,366
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$1,005	\$1,060	\$971	\$1,044	\$712	\$698	\$657	\$804
Total Per Person/Per Day	\$320	\$331	\$313	\$326	\$223	\$212	\$173	\$244
Lodging	\$187	\$188	\$186	\$194	\$107	\$99	\$83	\$148
Restaurant/Bar	\$75	\$79	\$67	\$86	\$47	\$51	\$45	\$54
Gifts/Shopping	\$14	\$19	\$12	\$14	\$25	\$24	\$11	\$11
Entertainment/Recreation	\$15	\$14	\$22	\$4	\$12	\$11	\$7	\$5
Local Travel	\$28	\$32	\$26	\$28	\$27	\$26	\$26	\$25

\*\* 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: 1<sup>st</sup> Quarter 2006

Planning the Trip to Palm Beach County	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Reason for Trip</b>								
Conference/Convention/ Business Meeting	55.4%	50.8%	64.0%	51.6%	46.2%	61.3%	51.8%	54.8%
- Business Meeting	47.5%	45.9%	54.4%	42.4%	41.6%	50.2%	46.1%	47.9%
- Conference/Convention	6.9%	4.4%	8.8%	7.2%	4.4%	10.3%	5.4%	5.1%
- Other Business	1.1%	0.4%	0.8%	2.0%	0.1%	0.8%	0.3%	1.8%
Vacation/Pleasure	36.3%	42.0%	31.2%	36.0%	44.0%	30.8%	40.5%	37.5%
Sporting Event	5.2%	2.4%	1.6%	11.2%	4.3%	3.1%	0.9%	3.1%
Cultural Event/Attraction	0.0%	0.0%	0.0%	0.0%	0.8%	0.4%	0.5%	0.3%
Film/TV location scouting/production	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%
Other	2.1%	4.8%	3.2%	1.2%	4.7%	4.5%	6.3%	4.1%
<b>Who Made the Decision</b>								
Employer	54.9%	51.2%	63.3%	50.4%	43.0%	52.4%	46.3%	53.3%
Head of Household/ Other adult	41.1%	44.2%	34.2%	44.6%	55.3%	45.1%	51.7%	38.9%
Family Living in PBC	4.9%	5.4%	4.2%	5.0%	N/A	N/A	N/A	8.1%
Children Influenced Decision	1.8%	1.7%	1.3%	2.5%	1.7%	2.5%	2.0%	2.1%
<b>Advanced Planning</b>								
One Month or Less	50.6%	50.7%	52.2%	49.0%	45.0%	52.6%	56.7%	50.5%
2 to 3 Months	24.3%	22.8%	24.9%	25.1%	25.2%	22.6%	20.9%	26.1%
More than 3 Months	25.1%	26.5%	22.9%	25.9%	29.8%	24.8%	22.4%	23.4%

\* Multiple responses accepted.



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Planning the Trip to Palm Beach County (Continued)	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Reasons for Selecting Palm Beach County Over Other Destinations*</b>								
Work Related Trip	55.9%	52.7%	64.0%	51.1%	47.5%	61.3%	52.1%	53.4%
Visit Friends/Relatives	21.1%	21.3%	15.5%	26.2%	27.3%	17.3%	24.1%	25.2%
Previous Visit	10.9%	13.2%	10.0%	9.4%	19.5%	10.9%	13.7%	9.1%
Weather	9.8%	9.9%	10.0%	9.4%	8.1%	5.1%	5.7%	7.5%
Convenient Flights	7.4%	8.7%	6.3%	7.3%	6.8%	5.4%	4.7%	9.3%
Golf/Tennis/Recreation	5.5%	5.0%	5.0%	6.4%	4.5%	3.0%	4.3%	2.8%
Special Event	4.4%	8.6%	2.5%	2.1%	9.1%	14.1%	11.1%	6.5%
Beaches	4.2%	3.3%	3.3%	6.0%	4.6%	4.6%	7.5%	4.0%
Friends/Relatives recommendation	3.5%	3.3%	4.2%	3.0%	15.7%	11.4%	17.3%	2.9%
Attend Sporting Event	2.7%	2.9%	2.1%	3.0%	3.5%	2.6%	1.0%	2.1%
Spring Training	1.6%	0.0%	0.0%	4.3%	2.3%	0.3%	0.0%	0.2%
Art/Cultural Event	1.3%	0.8%	0.8%	2.1%	2.6%	1.0%	1.2%	0.3%
Other Internet Sources	0.7%	1.2%	0.4%	0.4%	2.6%	3.5%	7.3%	1.0%
Hotel Brochure/Website	0.6%	0.8%	0.0%	0.9%	2.9%	3.5%	4.6%	1.4%
Travel Agency	0.6%	0.8%	0.4%	0.4%	1.1%	1.3%	1.4%	0.0%
Attraction Brochure/Website	0.5%	1.2%	0.4%	0.0%	0.9%	1.1%	1.1%	0.6%
Compete in Sporting Event	0.4%	0.4%	0.4%	0.4%	2.1%	0.8%	0.4%	1.5%
Bus Tour	0.1%	0.4%	0.0%	0.0%	N/A	N/A	N/A	0.5%
PBC-CVB Information/Website	0.1%	0.4%	0.0%	0.0%	0.6%	0.4%	1.2%	0.1%
County/State Tourist Agency	0.1%	0.4%	0.0%	0.0%	0.6%	0.3%	0.0%	0.0%
Media Coverage	0.1%	0.4%	0.0%	0.0%	1.4%	1.7%	3.6%	0.0%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	N/A	N/A	N/A	0.4%
Other	5.1%	6.2%	6.3%	3.0%	9.8%	11.7%	12.0%	5.7%

\* Multiple responses accepted.



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Planning the Trip to Palm Beach County (Continued)	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Booked Trip with Travel Agency</b>								
Yes	26.1%	21.2%	30.8%	26.1%	24.2%	21.7%	24.6%	21.4%
No	73.9%	78.8%	69.2%	73.9%	75.8%	78.3%	75.4%	78.6%
<b>Booked Any Part of Trip Using Internet</b>								
Yes	44.1%	45.8%	40.6%	45.6%	41.1%	43.7%	47.0%	52.5%
No	55.9%	54.2%	59.4%	54.4%	58.9%	56.3%	53.0%	47.5%
<b>Booked Any Part of Trip Using Internet* (among those who used the Internet)</b>								
Air	79.2%	80.1%	79.6%	77.9%	80.9%	76.1%	72.7%	78.3%
Hotel	55.2%	51.2%	58.1%	56.7%	55.0%	65.8%	65.6%	54.6%
Hotel website	31.8%	26.9%	37.6%	31.7%	27.1%	31.4%	31.5%	28.7%
Other Website	4.5%	5.4%	3.2%	4.8%	2.9%	2.6%	5.1%	3.8%
Expedia	2.6%	1.8%	2.2%	3.8%	3.5%	3.9%	7.1%	4.0%
Orbitz	2.0%	1.8%	0.0%	3.8%	1.8%	3.6%	2.7%	1.8%
hotels.com	1.2%	2.7%	1.1%	0.0%	4.6%	2.0%	2.9%	1.8%
Travelocity	1.0%	0.9%	1.1%	1.0%	1.8%	1.3%	2.4%	1.5%
Hotwire	0.3%	0.0%	1.1%	0.0%	0.0%	0.3%	0.0%	0.3%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	N/A	N/A	N/A	0.0%
Don't Remember	11.7%	11.7%	11.8%	11.5%	13.3%	20.7%	14.0%	12.5%
Car Rental	38.7%	38.7%	35.5%	41.3%	47.1%	43.6%	43.7%	43.2%
Tickets to Event	2.0%	0.9%	3.2%	1.9%	1.1%	1.0%	1.2%	0.7%
Other	3.6%	4.5%	3.2%	2.9%	2.2%	1.6%	2.7%	4.6%
<b>Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)</b>								
Yes	10.3%	11.0%	9.1%	10.9%	10.3%	11.7%	12.4%	11.7%
No	89.7%	89.0%	90.9%	89.1%	89.7%	88.3%	87.6%	88.3%
<b>Type of Transportation**</b>								
Airplane	81.8%	78.8%	83.1%	83.2%	80.7%	72.8%	69.1%	83.5%
Car	23.9%	26.8%	21.4%	23.6%	18.9%	26.8%	30.7%	23.8%
Other	0.8%	1.2%	1.2%	0.0%	0.4%	0.3%	0.2%	1.0%

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



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Characteristics of the Visit	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b><u>Main Destination</u></b>								
Palm Beach County	90.6%	90.2%	91.7%	89.8%	90.3%	93.2%	90.4%	89.4%
Ft. Lauderdale	4.7%	5.3%	4.5%	4.3%	4.0%	2.8%	4.5%	5.4%
<b><u>First Trip to PBC</u></b>								
	26.7%	26.4%	28.7%	24.9%	25.9%	27.2%	27.8%	22.4%
<b><u>Plan to Return to PBC</u></b>								
	78.1%	81.0%	77.1%	76.5%	82.9%	82.0%	82.0%	80.8%
<b><u>When do you plan on returning to PBC?</u></b>								
Within the next 3 months	26.2%	27.9%	28.6%	22.2%	24.6%	28.4%	31.8%	34.7%
Within the next 6 months	8.1%	8.5%	7.8%	7.9%	11.5%	14.7%	13.8%	9.5%
Within the next year	30.4%	26.0%	26.6%	38.1%	30.7%	22.3%	23.5%	18.2%
Within the next few years	10.1%	10.5%	13.0%	6.9%	10.5%	10.7%	9.6%	5.9%
Don't Know	25.3%	27.1%	24.0%	24.9%	22.8%	23.8%	21.3%	31.7%
<b><u>Influence of fuel cost</u></b>								
5 – Strong consideration	6.6%	7.6%	5.6%	6.6%	N/A	N/A	N/A	5.2%
4	5.2%	8.4%	3.9%	3.5%	N/A	N/A	N/A	5.2%
3	10.5%	11.6%	10.0%	10.2%	N/A	N/A	N/A	12.6%
2	6.6%	7.1%	6.9%	5.8%	N/A	N/A	N/A	8.6%
1 – No consideration at all	56.3%	53.3%	58.9%	56.6%	N/A	N/A	N/A	49.3%
I don't make the decision	14.7%	12.0%	14.7%	17.3%	N/A	N/A	N/A	19.1%
<b><u>Description of Travel Party*</u></b>								
Adult family members or friends	47.4%	47.5%	41.7%	52.5%	52.8%	43.6%	43.0%	44.6%
Self Only	28.8%	29.3%	29.8%	28.2%	22.9%	32.2%	31.1%	28.7%
Business Associates	23.7%	22.8%	28.9%	18.9%	21.6%	21.8%	22.2%	25.5%
Children <12 years of age	5.0%	3.8%	4.4%	6.7%	9.3%	8.6%	11.5%	9.3%
Grandchildren <12 years of age	0.3%	0.8%	0.0%	0.0%	0.7%	0.8%	0.8%	1.3%

\* Multiple responses accepted.



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Characteristics of the Visit (Continued)	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Participation in Specific Activities*</b>								
Restaurants	92.4%	92.0%	94.1%	91.3%	95.3%	94.9%	93.1%	91.5%
Shopping	38.9%	38.0%	32.8%	45.4%	47.3%	36.9%	38.9%	40.0%
Went to Beach	26.3%	24.8%	22.7%	30.8%	39.6%	33.8%	36.8%	25.3%
Golf, Tennis	18.8%	23.1%	13.4%	20.0%	18.8%	9.8%	12.1%	10.5%
Bars/Nightclubs	12.5%	17.7%	11.3%	9.2%	12.3%	13.5%	17.0%	12.4%
Visited downtown West Palm Beach Attractions/City Place	12.1%	12.8%	8.8%	14.6%	14.8%	7.3%	14.2%	8.7%
Swimming	11.7%	9.3%	8.0%	17.1%	7.4%**	12.9%**	13.6%**	12.8%
Visited Mizner Park/Boca Raton	9.7%	9.7%	10.1%	9.2%	12.5%	7.4%	8.4%	7.5%
Visited downtown Delray Beach Attractions	8.6%	9.7%	8.0%	8.3%	13.0%	8.5%	11.4%	7.8%
Museums, Art galleries	6.8%	6.6%	7.1%	6.7%	5.4%	3.1%	4.0%	3.0%
Visited Wildlife Refuge	3.7%	4.9%	2.9%	3.3%	4.2%	2.9%	3.0%	3.4%
Attended a Sporting Event	3.6%	2.2%	2.1%	6.3%	3.1%	1.4%	0.4%	2.4%
Attractions	3.3%	1.8%	3.8%	4.2%	3.3%	4.3%	4.2%	3.1%
Performing Arts (plays, concerts, dance)	3.0%	3.1%	3.8%	2.1%	3.7%	1.9%	1.6%	1.5%
Downtown at the Gardens	2.8%	4.9%	2.5%	1.3%	N/A	N/A	N/A	1.7%
Visited downtown Lake Worth	2.2%	2.2%	0.8%	3.3%	2.7%	0.8%	1.4%	1.4%
Boating	1.8%	2.2%	2.1%	1.3%	7.4%**	12.9%**	13.6%**	1.7%
Fishing	1.8%	4.0%	0.8%	0.8%	7.4%**	12.9%**	13.6%**	1.7%
Visited Riviera Beach/Singer Island	1.8%	3.5%	1.3%	0.8%	0.4%	0.7%	1.3%	1.4%
Snorkeling	1.0%	0.4%	0.0%	2.1%	7.4%**	12.9%**	13.6%**	0.5%
Competed in Sports	0.9%	0.9%	0.4%	1.3%	1.5%	1.2%	0.7%	1.2%
Gambling Cruise	0.7%	1.3%	0.0%	0.8%	1.7%	1.9%	1.7%	1.8%
Surfing	0.6%	0.5%	0.8%	0.4%	7.4%**	12.9%**	13.6%**	0.4%
Palm Beach County Convention Center	0.4%	0.5%	0.8%	0.0%	1.3%	0.0%	0.3%	0.0%
Pari-mutuels	0.4%	0.0%	0.4%	0.8%	0.6%	0.3%	0.7%	0.3%
Diving	0.3%	0.9%	0.0%	0.0%	7.4%**	12.9%**	13.6%**	0.1%
Kite Surfing	0.2%	0.0%	0.0%	0.4%	7.4%**	12.9%**	13.6%**	0.1%
Other	7.6%	6.2%	7.6%	8.8%	7.9%	8.4%	5.4%	4.8%

\*Multiple responses accepted.

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



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Attitudes about Trip to Palm Beach County	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Things Liked Best – Top Mentions</b>								
Climate/Weather	49.5%	42.2%	51.7%	54.0%	54.5%	36.1%	22.1%	41.9%
Beaches/Ocean	7.9%	4.8%	11.8%	7.1%	8.9%	11.3%	16.4%	10.0%
Beautiful Area/Nice Place	5.6%	6.8%	4.9%	5.2%	7.0%	10.0%	11.2%	6.3%
Nice People	4.2%	3.4%	5.9%	3.3%	3.5%	4.5%	5.7%	4.2%
Hotel	3.7%	4.9%	3.9%	2.4%	1.8%	3.1%	6.6%	3.7%
Visiting Friends/Relatives	3.2%	4.8%	1.0%	3.8%	2.9%	3.4%	6.0%	5.8%
Cleanliness	3.2%	3.4%	2.5%	3.8%	3.0%	4.2%	4.1%	3.6%
Relaxing Atmosphere	2.7%	5.8%	1.0%	1.4%	1.8%	1.9%	3.0%	2.3%
Restaurant	1.9%	3.9%	0.5%	1.4%	2.4%	1.4%	3.5%	2.6%
Golf	1.8%	2.0%	2.0%	1.4%	1.2%	1.9%	1.6%	1.5%
Everything	1.4%	1.9%	1.0%	1.4%	0.8%	3.0%	1.4%	3.4%
Shopping	1.1%	1.4%	1.0%	0.9%	1.8%	3.5%	1.6%	1.7%
Location	0.8%	2.4%	0.0%	0.0%	1.0%	2.2%	2.1%	0.3%
Other	13.2%	12.4%	13.0%	13.9%	9.8%	14.0%	15.2%	12.6%





# Hotel Survey: 1<sup>st</sup> Quarter 2006

Attitudes about Trip to Palm Beach County	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Things Liked Least – Top Mentions</b>								
Traffic/Bad Drivers	40.2%	37.7%	38.8%	43.4%	37.9%	32.9%	23.3%	33.4%
Humidity/Poor Weather	9.7%	18.1%	9.1%	3.1%	11.0%	22.0%	19.7%	17.5%
Expensive	4.7%	0.8%	5.8%	7.0%	6.6%	6.9%	5.3%	5.2%
Crowded	4.0%	4.1%	5.8%	2.3%	7.0%	2.7%	2.7%	1.5%
Cost of Hotel	3.8%	1.6%	5.8%	3.9%	0.6%	0.0%	0.3%	1.1%
Road Construction	3.8%	4.9%	1.7%	4.7%	2.7%	3.0%	2.9%	3.6%
Hotel (general)	2.6%	3.3%	3.3%	1.6%	6.3%	2.4%	2.1%	3.4%
Stay Was Too Short	2.2%	1.6%	2.5%	2.3%	0.3%	1.5%	1.8%	3.5%
Lack of Directional Signs	2.1%	2.4%	2.5%	1.6%	2.1%	1.5%	1.8%	1.2%
Work	1.9%	1.6%	1.7%	2.3%	0.3%	0.0%	0.9%	0.5%
Appearance	0.3%	0.0%	0.8%	0.0%	2.4%	1.2%	0.9%	0.8%
Other	13.5%	12.8%	11.5%	15.2%	16.5%	18.9%	16.8%	16.9%
<u>Nothing liked least</u>	11.6%	10.6%	10.7%	13.2%	6.3%	7.2%	22.1%	10.7%



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Attitudes about Trip to Palm Beach County	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b>Suggestions for Improvement - Top Mentions</b>								
Longer stay	18.4%	17.0%	16.1%	21.7%	N/A	N/A	N/A	17.2%
Better weather	18.0%	23.2%	26.4%	5.4%	N/A	N/A	N/A	12.2%
Improve traffic/Finish Construction on I-95	10.0%	14.0%	4.6%	10.9%	N/A	N/A	N/A	9.1%
Come during vacation time	5.8%	3.0%	8.0%	6.5%	N/A	N/A	N/A	7.8%
Cheaper hotel	4.8%	3.0%	3.4%	7.6%	N/A	N/A	N/A	0.0%
Better hotel	4.6%	3.0%	8.0%	3.3%	N/A	N/A	N/A	5.0%
Come with friends/family	3.7%	2.0%	2.3%	6.5%	N/A	N/A	N/A	0.3%
Lower prices	1.9%	0.0%	1.1%	4.3%	N/A	N/A	N/A	2.0%
Stay closer to the beach	1.8%	1.0%	1.1%	3.3%	N/A	N/A	N/A	1.1%
Better hotel location	1.8%	0.0%	4.6%	1.1%	N/A	N/A	N/A	0.0%
Less business and more partying/more free time	1.5%	1.0%	0.0%	3.3%	N/A	N/A	N/A	4.5%
Nothing	9.3%	7.0%	12.6%	8.7%	N/A	N/A	N/A	13.9%
Other	18.9%	26.0%	12.2%	18.7%	N/A	N/A	N/A	25.7%



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Characteristics of Visitors	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b><u>Age</u></b>								
Under 35	14.5%	15.3%	14.1%	14.1%	16.1%	15.2%	18.8%	16.4%
35 to 54	49.8%	49.2%	52.4%	48.0%	51.7%	59.2%	57.8%	53.4%
55 to 64	21.4%	25.0%	19.4%	20.2%	18.8%	17.1%	18.0%	23.4%
65 +	14.2%	10.5%	14.1%	17.7%	13.5%	8.5%	5.4%	6.8%
<b><u>Occupation</u></b>								
Prof/Managerial	60.7%	65.5%	58.3%	58.7%	50.5%	56.4%	53.4%	65.3%
Retired	15.9%	11.7%	18.8%	16.9%	13.7%	9.0%	7.0%	8.1%
Sales	12.4%	11.2%	9.6%	16.1%	16.5%	15.0%	14.9%	16.5%
Technical	5.2%	3.7%	8.8%	3.3%	4.5%	5.5%	7.7%	5.7%
Student	1.8%	2.9%	0.4%	2.1%	0.8%	0.4%	1.6%	0.8%
Other	4.0%	5.0%	4.2%	2.9%	13.7%	13.7%	15.3%	3.6%
<b><u>Hispanic Origin</u></b>	2.3%	1.7%	2.9%	2.2%	N/A	N/A	N/A	5.5%
<b><u>Ethnicity</u></b>								
White/Caucasian	94.4%	94.5%	94.1%	94.4%	94.3%	92.4%	90.8%	93.1%
African-American/Black	3.1%	3.8%	3.0%	2.6%	3.1%	4.8%	6.5%	3.2%
Asian	2.6%	1.7%	3.0%	3.0%	2.5%	2.3%	2.5%	3.1%
Other	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%	0.2%	0.6%



## Hotel Survey: 1<sup>st</sup> Quarter 2006

Characteristics of Visitors (Continued)	<u>Total 1Q 2006</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>	<u>Total 3Q 2005</u>	<u>Total 4Q 2005</u>
<b><u>Income</u></b>								
Under \$45,000	3.3%	5.5%	2.7%	1.9%	3.2%	5.5%	6.6%	3.2%
\$45,000 to \$64,999	7.9%	7.8%	6.8%	9.1%	7.9%	7.9%	10.9%	7.7%
\$65,000 to \$99,999	19.4%	18.8%	24.0%	15.3%	22.6%	21.3%	21.9%	22.0%
\$100,000 to \$200,000	40.0%	35.0%	39.8%	45.0%	38.3%	41.9%	37.8%	40.7%
Over \$200,000	29.4%	32.9%	26.7%	28.7%	28.0%	23.4%	22.9%	26.4%
<b><u>Gender</u></b>								
Male	58.2%	64.1%	58.3%	52.7%	57.3%	57.1%	56.6%	54.7%
Female	41.8%	35.9%	41.7%	47.3%	42.7%	42.9%	43.4%	45.3%



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Place of Origin	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b><u>Domestic</u></b>	<b>92.2%</b> (n=680)	<b>92.6%</b>	<b>89.8%</b>	<b>93.9%</b>	<b>90.4%</b> (n=666)	<b>92.2%</b> (n=687)	<b>90.1%</b> (n=664)	<b>88.7%</b> (n=648)
Southeast	17.3% (n=128)	14.4%	19.5%	17.8%	14.3% (n=105)	16.2% (n=121)	16.6% (n=122)	18.3% (n=134)
Midwest	17.3% (n=128)	12.7%	19.9%	19.0%	16.6% (n=122)	16.0% (n=119)	12.6% (n=93)	15.2% (n=111)
Mid Atlantic	16.8% (n=124)	18.0%	13.8%	18.6%	17.3% (n=128)	12.2% (n=91)	13.0% (n=96)	14.2% (n=104)
New York	15.0% (n=110)	18.8%	13.4%	13.0%	15.8% (n=116)	10.5% (n=78)	9.9% (n=73)	12.6% (n=92)
Florida	12.3% (n=91)	15.9%	13.0%	8.5%	8.4% (n=62)	20.6% (n=153)	23.4% (n=172)	14.5% (n=106)
New England	8.5% (n=63)	7.0%	6.5%	11.7%	10.3% (n=76)	8.1% (n=60)	7.2% (n=53)	5.9% (n=43)
Far West	4.9% (n=36)	5.8%	3.7%	5.3%	7.7% (n=57)	8.5% (n=63)	7.3% (n=54)	8.0% (n=58)
<b><u>International</u></b>	<b>7.8%</b> (n=58)	<b>7.4%</b>	<b>10.2%</b>	<b>6.1%</b>	<b>9.6%</b> (n=70)	<b>7.8%</b> (n=58)	<b>9.9%</b> (n=73)	<b>11.3%</b> (n=83)
Europe (net)	3.8% (n=28)	4.1%	4.5%	2.8%	4.9% (n=36)	4.0% (n=30)	4.5% (n=33)	6.8% (n=50)
- England/UK	1.7% (n=13)	2.5%	2.4%	0.4%	2.7% (n=20)	2.3% (n=17)	3.2% (n=23)	3.2% (n=23)
- Germany	1.2% (n=9)	0.8%	0.8%	2.0%	0.9% (n=6)	0.5% (n=4)	0.4% (n=3)	1.2% (n=9)
Canada	2.7% (n=20)	1.6%	4.9%	1.6%	2.5% (n=19)	2.4% (n=18)	1.6% (n=12)	1.9% (n=14)
Latin America / Caribbean	0.7% (n=5)	0.4%	0.8%	0.8%	1.1% (n=8)	1.1% (n=8)	3.1% (n=23)	1.6% (n=12)
Middle East	0.5% (n=4)	0.8%	0.0%	0.8%	0.1% (n=1)	0.3% (n=2)	0.4% (n=3)	0.4% (n=3)
Australia/Asia	0.1% (n=1)	0.4%	0.0%	0.0%	0.8% (n=6)	0.0% (n=0)	0.1% (n=1)	0.5% (n=4)
Africa	0.0% (n=0)	0.0%	0.0%	0.0%	0.0%	0.0%	0.1% (n=1)	0.0% (n=0)



# Hotel Survey: 1<sup>st</sup> Quarter 2006

Pleasure Vs. Business By Selected Place of Origin	Total 1Q 2006	Jan.	Feb.	Mar.	Total 1Q 2005	Total 2Q 2005	Total 3Q 2005	Total 4Q 2005
<b><u>Southeast</u></b>	<b>17.3%</b>	<b>14.4%</b>	<b>19.5%</b>	<b>17.8%</b>	<b>14.3%</b>	<b>16.2%</b>	<b>16.6%</b>	<b>18.3%</b>
Business	12.5%	8.2%	16.0%	13.0%	9.4%	11.1%	10.9%	13.4%
Pleasure	4.7%	6.1%	3.3%	4.9%	4.8%	4.8%	5.6%	4.8%
<b><u>Midwest</u></b>	<b>17.3%</b>	<b>12.7%</b>	<b>19.9%</b>	<b>19.0%</b>	<b>16.6%</b>	<b>16.0%</b>	<b>12.6%</b>	<b>15.2%</b>
Business	11.0%	7.4%	14.6%	10.9%	7.3%	11.3%	6.9%	7.3%
Pleasure	6.0%	5.3%	4.5%	8.1%	9.1%	4.7%	5.7%	7.6%
<b><u>Mid Atlantic</u></b>	<b>16.8%</b>	<b>18.0%</b>	<b>13.8%</b>	<b>18.6%</b>	<b>17.3%</b>	<b>12.2%</b>	<b>13.0%</b>	<b>14.2%</b>
Business	7.3%	8.2%	6.9%	6.9%	5.8%	4.4%	4.9%	6.3%
Pleasure	9.5%	9.8%	6.9%	11.7%	11.5%	7.4%	7.9%	7.9%
<b><u>New York</u></b>	<b>15.0%</b>	<b>18.8%</b>	<b>13.4%</b>	<b>13.0%</b>	<b>15.8%</b>	<b>10.5%</b>	<b>9.9%</b>	<b>12.6%</b>
Business	4.7%	7.0%	4.1%	3.2%	4.3%	4.7%	3.3%	4.3%
Pleasure	10.2%	11.5%	9.3%	9.7%	11.3%	5.8%	6.6%	8.1%
<b><u>Florida</u></b>	<b>12.3%</b>	<b>15.8%</b>	<b>13.0%</b>	<b>8.5%</b>	<b>8.4%</b>	<b>20.6%</b>	<b>23.4%</b>	<b>14.5%</b>
Business	8.9%	11.1%	9.8%	6.5%	6.4%	14.6%	12.6%	9.4%
Pleasure	3.3%	4.2%	3.3%	2.0%	2.0%	5.6%	10.4%	4.9%
<b><u>New England</u></b>	<b>8.5%</b>	<b>7.0%</b>	<b>6.5%</b>	<b>11.7%</b>	<b>10.3%</b>	<b>8.1%</b>	<b>7.2%</b>	<b>5.9%</b>
Business	3.8%	3.3%	3.7%	4.5%	4.2%	3.9%	3.5%	2.2%
Pleasure	4.7%	3.7%	2.8%	7.3%	5.7%	4.2%	3.7%	3.7%
<b><u>Far West</u></b>	<b>4.9%</b>	<b>5.8%</b>	<b>3.7%</b>	<b>5.3%</b>	<b>7.8%</b>	<b>8.5%</b>	<b>7.3%</b>	<b>8.0%</b>
Business	3.9%	4.9%	2.4%	4.5%	5.7%	6.6%	4.6%	5.7%
Pleasure	0.9%	0.8%	1.2%	0.8%	1.9%	1.9%	2.7%	2.3%