



Report on Palm Beach County Tourism First Quarter 2007 (January, February and March)

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Introduction: 1st Quarter 2007

Background

- The following report contains information collected during the 1st Quarter of 2007 (January, February and March), the second quarter of Fiscal Year 2006/2007.
- Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.



Property Manager Survey: 1st Quarter 2007

Occupancy Rates

- **In the first quarter of 2007, the average occupancy rate for Palm Beach County surveyed hotels was 80.8%. This represents a decrease of 3.9 percentage points compared to the first quarter of last year (84.7%) and an increase of 16.2 percentage points compared to last quarter (64.6%).**
 - As the months progressed during 1Q2007, the occupancy rate increased steadily from 73.8% in January to 82.8% in February to 85.6% in March.
 - Smaller (50-100 rooms) and larger (101+ rooms) properties reported occupancy rates comparable to each other (80.5% - smaller properties, 80.8% - larger properties).
- **In terms of geographic area, the average occupancy rate was 78.1% among hotels in the Northern region, 80.5% among hotels in the Southern region and 82.8% among hotels in the Central region.**
 - Hotels from all three regions reported increases in occupancy rates compared to last quarter (Northern – up 18.3 percentage points, Central – up 17.3 percentage points and Southern – up 14.6 percentage points).
 - Compared to 1Q2007, hotels in the Northern and Southern regions saw decreases in the average occupancy rate of 5.3 and 5.1 percentage points, respectively (from 83.4% to 78.1%, Northern Region and from 85.6% to 80.5%, Southern Region). Hotels in the Central region reported an average occupancy rate in 1Q2007 comparable to 1Q2006 (84.5% in 2006 and 82.8% in 2007).
 - **An estimated 1,070,734 Palm Beach County hotel room nights were occupied during the first quarter of 2007 – a decrease of 67,701 room nights compared to 1Q2006 (1,138,435) and an increase of 212,432 room nights compared to 4Q2006 (858,302).**
- **The average percentage of international guests staying at Palm Beach County hotels during the first quarter of 2007 was 3.0%. This is comparable with 1Q2006 (4.5%) and the prior quarter (2.8%).**
 - Based on the hotel managers who responded, smaller hotels (50-100 rooms) reported that 5.9% of their guests were from abroad, while larger properties (101 + rooms) reported that 2.6% of hotel guests were from foreign countries.
 - Properties in the Southern region reported the highest percentage of international guests in 1Q2007 (4.9%).
- **In 1Q2007, surveyed property managers claimed that 41.5% of hotel rooms were occupied by leisure travelers, 31.9% by business travelers and 26.6% were occupied by convention/group travelers.**
- **Conference/convention bookings represented 29.4% of occupied room nights at designated convention hotels. This is comparable to 1Q2006 (30.5%) and slightly lower than last quarter (31.7%, a 2.3 percentage point decrease).**

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



Property Manager Survey: 1st Quarter 2007

Average Daily Room Rate (ADR)

- **The ADR for participating Palm Beach County properties in the first quarter of 2007 was \$204.33 – this is approximately the same as in 1Q2006 (\$204.12) and represents a 52.5% increase compared to the previous quarter (\$134.03).**
 - Smaller properties (50-100 rooms) reported a 16.7% increase in ADR compared to the same quarter last year (from \$164.79 to \$192.28) and a 60.1% increase compared to the last quarter (\$120.10). Larger properties reported a 2.3% decrease in ADR compared to 1Q2007 (from \$211.07 to \$206.22) but reported a 51.6% increase in ADR compared to the previous quarter (\$136.06).
 - Among larger properties, hotels with 101-219 rooms reported an ADR of \$144.39 (a 6.5% decrease compared to 1Q2006, \$154.43) and hotels with 220-500 rooms reported an ADR of \$208.85 (a 5.3% decrease compared to 1Q2006, \$220.64). Hotels with 101-219 rooms and hotels with 220-500 rooms reported increases in ADR compared to last quarter (56.0%, hotels with 101-219 rooms and 54.8%, hotels with 220-500 rooms).

Future Business Outlook

- **More than one-half of surveyed property managers (52.7%) expect an increase in room revenue compared to the same months the last year. Almost one-third (31.7%) predict a decrease and 15.7% believe there will be no change in room revenue compared to 1Q2006.**
 - Among hotel managers expecting an increase in room revenue compared to the previous year, the average increase expected is 8.6%.
 - Among hotel managers expecting a decrease in room revenue compared to the previous year, the average decrease expected is 8.2%.

Bookings Via Third Party Websites

- **The percentage of hotel reservations sold through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc) in the first quarter of 2007 (11.3%) was approximately the same as in 1Q2006 (11.1%) and 3.2 percentage points lower than the in the previous quarter (14.5%).**
 - Smaller properties (50-100 rooms) booked 22.0% (on average) of their rooms through third party websites, while larger properties (101+ rooms) booked, on average, 8.4% of their rooms that way.



Hotel Visitor Survey: 1st Quarter 2007

Characteristics of Stay

- In 1Q2007, the average party size of surveyed hotel guests was 2.1*, at parity with last quarter (2.0) and same as in 1Q2006. The median party size for 1Q2007 and for all months within the quarter was 2.0.
- Hotel guests stayed, on average, 3.3 nights in a hotel and occupied 1.3 rooms per night*.
 - Compared to 1Q2006, the average number of nights stayed in a hotel in Palm Beach County decreased by 1.1 days, from 4.4 days in 1Q2006 to 3.3 days in 1Q2007.

Planning the Trip to Palm Beach County

- More than one-half of Palm Beach County surveyed guests (55.1%) claimed to be business travelers (conference/convention/business meeting) and 34.9% claimed to be vacationers. Approximately one-half of surveyed business travelers reported that a 'business meeting' was the main reason for their visit (49.1%).
 - The percentages of business and leisure travelers in 1Q2007 were comparable to 1Q2006 (55.4% business and 36.3%, leisure). Compared to last quarter, the percentage of business travelers decreased by 17.1 percentage points (from 72.2% in 4Q2006 to 55.1% to 1Q2007), while the percentage of vacationers increased by 13.4 percentage points (from 21.5% to 34.9%).
- When asked why they selected PBC over other destinations, more than one-half of surveyed visitors stated that it was due to a work related trip (54.9%). Visitors also frequently cited 'visit friends/relatives' (19.5%) and 'previous visit' (14.2%).
 - The percentage of those who mentioned 'work related trip' decreased by 13.7 percentage points compared to last quarter (68.6%) but was comparable to the same quarter last year (55.9%).
- Consistent with the percentage of those who came to PBC due to a 'work related trip', visitors most often reported that the decision to come to PBC was made by their employers (54.1%). This represents a 12.9 percentage point decrease compared to last quarter (67.0%) and is at parity with 1Q2006 (54.9%).
- Short term planners (planned the trip one month or less in advance) comprised 52.1% of hotel guests surveyed in 1Q2007.

Booking a Trip to Palm Beach County

- Use of a travel agent to book part of visitors' trips to PBC (23.7%) decreased compared to 4Q2006 (28.3%, a 4.6 percentage point decrease) and 1Q2006 (26.1%, a 2.4 percentage point decrease).
- Use of the Internet among surveyed visitors to book any part of their trip to PBC increased slightly compared to last quarter (from 42.3% in 4Q2006 to 44.9% in 1Q2007) and was comparable to the first quarter of last year (44.1%).
 - Hotel guests who used the Internet to book part of their trip to PBC most often used it to book airfare (76.1%), hotel accommodations (64.8%) and/or to reserve a rental car (41.7%).

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



Hotel Visitor Survey: 1st Quarter 2007

Booking a Trip to Palm Beach County (Continued)

- Use of the Internet to book hotel rooms in 1Q2007 (64.8%) was comparable with last quarter (65.4%) and increased by 9.6 percentage points compared to 1Q2006 (55.2%).
- Visitors to PBC who booked hotel rooms online continued to do so, most frequently, by using hotel websites directly (28.4%).
- The percentage of visitors who claimed that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meal, rental car, etc) was 7.2%.

Visitor Expenditures

- **While visiting Palm Beach County, surveyed visitors spent an average of \$1,696 per party*, which represents a 25.6% (\$346) increase compared to last quarter (\$1,350) and a 30.8% (\$755) decrease compared to the same quarter last year (\$2,451).**
 - Compared to 4Q2006, there have been increases in 'Lodging' (from \$714 to \$1,043, a 46.1% increase), 'Restaurant/Bar' (from \$320 to \$353, a 10.3% increase) and 'Local Travel' (from \$129 to \$142, a 10.1% increase).
 - All spending categories experienced decreases compared to 1Q2006.
 - **The average per person expenditure also declined in 1Q2007 (\$808) compared to 1Q2006 (\$1,167) - a 30.8% (\$359) decrease.**
- **The average per party expenditure among vacationers in 1Q2007 was \$2,271, while the average per party expenditure among business travelers was \$1,366.**
 - Both leisure and business travelers' per party expenditures increased compared to last quarter (leisure - up 17.4%, from \$1,935 to \$2,271 and business travelers – up 19.7%, from \$1,141 to \$1,366).
 - Compared to the prior year, leisure travelers' per party expenditure decreased 31.6% (from \$3,318 in 2006 to \$2,271 in 2007), and business travelers' per party expenditure decreased 22.3% (from \$1,758 to \$1,366).

Characteristics of Visitors

- In terms of household income, 67.3% of surveyed guests have an income of \$100,000 or greater.
- More than nine-in-ten surveyed respondents considered themselves as White/Caucasian (92.9%). Just over one-half are between the ages of 35 and 54 (51.6%) and almost two-thirds (63.5%) claimed to have professional/managerial jobs.
- In 1Q2007, 'adult family member/friends' were cited most often as surveyed visitors' traveling companions (41.6%). Thirty-one point six percent of surveyed visitors were traveling alone.

* 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: 1st Quarter 2007

Travel Details

- The percentage of surveyed guests visiting Palm Beach County for the first time (19.8%) decreased by 5.6 percentage points compared to last quarter (25.4%) and by 6.9 percentage points compared to 1Q2006 (26.7%).
- The vast majority of surveyed visitors claimed that Palm Beach County was their main destination (89.0%).
- Eight-in-ten surveyed visitors traveled by air to come to PBC in 1Q2007 (80.2%).

Attitudes toward Palm Beach County

- As seen in previous quarters, the aspects of the trip to PBC that visitors appreciated the most were 'climate/weather' (48.9%), 'beaches/ocean' (10.8%) and 'beautiful area/nice place' (6.8%).
- 1Q2007 hotel guests mentioned 'traffic/bad drivers' most often when asked what they liked least about their trip to Palm Beach County (41.6%).
- In 1Q2007, surveyed visitors reported that a longer stay (22.3%), better weather (13.7%) and traffic improvements/finish construction on I-95 (7.1%) would make their next trip to PBC better.

Activity Participation

- Nearly all surveyed visitors ate at area restaurants while visiting Palm Beach County in 1Q2007 (93.4%). Other popular activities included shopping (33.1%), going to the beach (26.7%) and going to bars/nightclubs (14.0%).

Return Visits

- When asked if they plan to return to Palm Beach County in the future, 84.5% of surveyed guests answered yes.
 - Among those who plan to visit Palm Beach County in the future, seven-in-ten (69.7%) plan to do so in the next year; 29.7% within the next three months.
 - Those who have no plans to return to PBC comprised 2.5% of surveyed guests and the most frequently mentioned reason provided for not coming back was 'no business in the area' (20.0%).

Influence of Travel Rising Costs

- It appears that the impact of rising fuel costs may be increasing. While slightly more than half of those surveyed (51.5%) claimed that the rising costs of transportation due to rising fuel costs would not affect the decision whether or not to visit 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), this represents a 5.2 percentage point decrease compared to last quarter (56.7%) and an 11.4 percentage point decrease compared to 1Q2006 (62.9%). Importantly, the percentage of those who claimed that rising costs of transportation would impact their decision to visit PBC (9.4%) did not vary significantly compared to last quarter (8.1%) and 1Q2006 (11.8%). Many more are claiming that they are not responsible for the decision (28.1%) compared to 1Q2006 (14.7%).
- When asked about the impact of generally increasing travel costs, about one-half of surveyed hotel guests reported that this would have little to no impact on the decision to travel to Palm Beach County in the future (49.0% rated 1 or 2 on a 5-point scale where 5 indicated a strong consideration and 1 indicated no consideration at all). Eight point seven percent of surveyed guests reported that generally increasing travel costs would have a strong impact on their future travel to PBC (8.7% rated 4 or 5).



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Property Manager Survey



Methodology

Property Manager Survey

Each month, self-administered surveys are completed by hotel Property Managers throughout Palm Beach County.

The occupancy rate is derived by weighting the responding occupied room nights by the available room nights* in Palm Beach County.

The product of the average daily room rate for each hotel size category and the occupied room nights in the county for each corresponding category equals lodging revenues per size category. The addition of all the individual lodging revenue equals total lodging revenue for the county.

The average daily room rate (ADR) is computed by dividing the total lodging revenue by the occupied room nights in the county*.

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



Property Manager Survey: 1st Quarter 2007

	<u>Total 1Q 2007</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Total 1Q 2006</u>	<u>Total 2Q 2006</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>
Occupancy Rate								
Month/Quarter	80.8%	73.8%	82.8%	85.6%	84.7%	71.0%	56.9%	64.6%
FYTD (Oct. - Set.)	72.7%	66.9%	70.1%	72.7%	78.4%	76.0%	71.2%	64.6%
Room Nights Occupied^{1*}								
Month/Quarter	1,070,734	335,048	339,530	396,156	1,138,435	964,792	769,629	858,302
FYTD (Oct. - Set.)	1,929,036	1,193,350	1,532,880	1,929,036	2,095,383	3,060,175	3,829,804	858,302
Percentage of Room Nights Occupied								
Leisure	41.5%	39.1%	44.5%	41.1%	40.4%	37.5%	39.8%	38.6%
Business	31.9%	32.2%	31.2%	32.3%	34.5%	32.0%	35.3%	36.7%
Convention/Group	26.6%	28.7%	24.3%	26.6%	25.2%	30.5%	24.9%	24.7%
Average Daily Room Rate²	\$204.33	\$186.67	\$213.29	\$211.85	\$204.12	\$142.96	\$104.60	\$134.03

+ 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: 1st Quarter 2007

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>99/00</u>	<u>00/01</u>	<u>01/02</u>	<u>02/03</u>	<u>03/04</u>	<u>04/05</u>	<u>05/06</u>	<u>06/07</u>
1st Quarter (Jan/Feb/Mar)	N/A	N/A	76.2	77.9	83.8	88.3	84.7	80.8
January	71.9	74.7	69.0	71.3	74.2	84.0	79.7	73.8
February	85.7	85.5	81.4	81.7	88.8	91.1	86.3	82.8
March	83.5	84.9	79.7	81.4	88.4	89.9	87.1	85.6
2nd Quarter (April/May/June)	N/A	N/A	65.1	67.0	71.8	72.7	71.0	N/A
3rd Quarter (July/August/Sept.)	N/A	N/A	57.3	57.8	64.2	63.0	56.9	N/A
4th Quarter (Oct/Nov/Dec)	N/A	N/A	57.5	59.8	64.2	79.8	73.1	64.6
Fiscal YTD (Oct. – Sept.)	68.8	67.3	64.1	65.7	70.9	76.0	71.2	72.7
Number of Room Nights Occupied in 1st Quarter*							1,138,435	1,070,734

+ 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: 1st Quarter 2007

	<u>Total 1Q 2007</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Total 1Q 2006</u>	<u>Total 2Q 2006</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>
Conference/Convention Bookings								
<u>All Hotels</u>								
% Occupied Room Nights in County	26.6%	28.7%	24.3%	26.6%	25.2%	30.5%	24.9%	24.7%
Occupied Room Nights in County	284,042	96,159	82,506	105,377	291,689	299,502	191,074	212,303
Occupied Room Nights in County FYTD (Oct.- Sept.)	496,345	308,462	390,968	496,345	594,162	893,664	1,084,738	212,303
<u>Convention Hotels</u>								
% Occupied Room Nights	29.4%	34.1%	27.8%	27.2%	30.5%	36.1%	30.4%	31.7%
Occupied Room Nights	199,451	72,147	59,085	68,219	213,289	213,971	138,862	163,663
Occupied Room Nights FYTD (Oct.- Sept.)	363,114	235,810	294,895	363,114	370,357	584,328	723,190	163,663
Available Inventory*								
Rooms in County	44,219	14,645**	14,645**	14,929**	45,020	44,737	44,014	43,380
Room Nights	1,326,854	453,995	410,060	462,799	1,350,518	1,357,026	1,349,968	1,330,320
Room Nights FYTD (Oct.- Sept.)	2,657,174	1,784,315	2,194,375	2,657,174	2,671,716	4,028,742	5,378,710	1,330,320
Response Rate								
Month/Quarter (for all hotels in County)	62.3%	63.0%	60.9%	63.2%	59.7%	60.0%	61.5%	61.8%
FYTD (Oct.- Sept.)	62.1%	62.1%	61.9%	62.1%	57.4%	58.3%	59.1%	61.8%

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

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

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



Property Manager Survey: 1st Quarter 2007

Occupancy Rate	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Size of Hotel								
50 - 100 Rooms	80.5%	73.9%	83.1%	86.1%	88.1%	69.3%	52.9%	60.9%
101 + Rooms	80.8%	73.7%	82.7%	85.5%	84.1%	71.3%	57.4%	65.2%
101-219	81.0%	72.4%	82.5%	87.4%	84.5%	68.2%	58.1%	65.5%
220-500	81.0%	76.4%	83.5%	83.0%	82.4%	76.9%	57.9%	65.8%
All Properties	80.8%	73.8%	82.8%	85.6%	84.7%	71.0%	56.9%	64.6%
Geographic Region								
North	78.1%	65.7%	78.7%	88.5%	83.4%	73.1%	55.7%	59.8%
Central	82.8%	75.2%	84.7%	88.4%	84.5%	70.6%	61.1%	65.5%
South	80.5%	76.4%	83.5%	81.6%	85.6%	70.5%	53.5%	65.9%

What percent of your occupancy is international?	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Size of Hotel								
50-100 Rooms	5.9%	6.7%	7.1%	4.2%	11.5%	3.6%	2.5%	4.5%
101 + Rooms	2.6%	2.7%	2.8%	2.3%	3.1%	2.6%	2.7%	2.6%
101-219	2.3%	2.4%	2.4%	2.2%	4.0%	2.8%	3.2%	2.6%
220-500**	2.4%	2.6%	2.6%	2.0%	1.5%	1.2%	0.7%	1.3%
All Properties	3.0%	2.9%	3.6%	2.8%	4.5%	2.8%	2.8%	2.8%
Geographic Region								
North**	1.8%	1.9%	1.2%	2.1%	1.4%	1.2%	1.2%	3.2%
Central	2.4%	2.6%	3.2%	1.7%	5.2%	2.6%	2.3%	2.8%
South	4.9%	5.2%	5.1%	4.5%	5.7%	3.9%	4.3%	2.7%

* Caution: Extremely low base



Property Manager Survey: 1st Quarter 2007

Average Daily Room Rate	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Size of Hotel								
<u>50 - 100 Rooms</u>	\$192.28	\$186.22	\$205.72	\$184.45	\$164.79	\$117.22	\$94.91	\$120.10
<u>101 + Rooms</u>	\$206.22	\$186.73	\$214.41	\$216.26	\$211.07	\$146.99	\$106.04	\$136.06
101-219	\$144.39	\$128.05	\$150.30	\$151.79	\$154.43	\$101.80	\$85.25	\$92.56
220-500	\$208.85	\$184.04	\$203.96	\$236.50	\$220.64	\$159.02	\$109.37	\$134.95
<u>All Properties</u>	\$204.33	\$186.67	\$213.29	\$211.85	\$204.12	\$142.96	\$104.60	\$134.03



Property Manager Survey: 1st Quarter 2007

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
1Q		
2005	1,173,859+	- 1.1
2006	1,138,435	- 3.0
2007	1,070,734	- 5.9
January		
2005	382,241+	
2006	371,569	- 2.8
2007	335,048	- 9.8
February		
2005	378,098+	
2006	363,282	- 3.9
2007	339,530	- 6.5
March		
2005	413,520+	
2006	403,584	- 2.4
2007	396,156	- 1.8
2Q		
2005	969,020+	
2006	964,792	- 0.4
2007		
3Q		
2005	862,035+	
2006	769,629	- 10.7
2007		
4Q		
2005	956,948+	
2006	858,302	- 10.3
2007		
FYTD (October – March)		
2005	2,226,221+	
2006	2,095,383	- 5.9
2007	1,929,036	- 7.9

+ 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: 1st Quarter 2007

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>
February 2007 / March 2007 predictions from January			
Foresee Decrease	38.0%	43.2%	38.6%
Average decrease (among those who foresee decrease)	9.1%	12.4%	8.9%
Foresee No Change	5.0%	14.4%	18.6%
Foresee Increase	57.0%	42.4%	42.8%
Average increase (among those who foresee increase)	10.0%	10.8%	11.3%
March 2007 / April 2007 predictions from February			
Foresee Decrease	34.2%	28.5%	38.6%
Average decrease (among those who foresee decrease)	7.6%	9.9%	6.8%
Foresee No Change	19.6%	18.7%	27.0%
Foresee Increase	46.3%	52.8%	34.4%
Average increase (among those who foresee increase)	6.4%	5.3%	9.5%
April 2007 / May 2007 predictions from March			
Foresee Decrease	24.0%	22.9%	20.0%
Average decrease (among those who foresee decrease)	7.7%	9.0%	9.4%
Foresee No Change	22.0%	28.3%	39.7%
Foresee Increase	54.0%	48.8%	40.3%
Average increase (among those who foresee increase)	8.8%	7.0%	6.9%
First Quarter predictions from January, February and March			
Foresee Decrease	31.7%	31.3%	31.9%
Average decrease (among those who foresee decrease)	8.2%	10.8%	8.2%
Foresee No Change	15.7%	20.9%	28.8%
Foresee Increase	52.7%	47.8%	39.2%
Average increase (among those who foresee increase)	8.6%	7.5%	9.2%



Property Manager Survey: 1st Quarter 2007

Bookings via third party website	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Size of Hotel								
<u>50 - 100 Rooms</u>	22.0%	17.3%	24.7%	23.8%	15.9%	12.4%	20.7%	26.4%
<u>101 + Rooms</u>	8.4%	10.2%	6.8%	8.2%	8.7%	12.6%	12.9%	10.7%
101-219	9.5%	12.2%	7.6%	9.0%	9.7%	14.9%	13.9%	11.5%
220-500	4.5%	3.5%	4.6%	5.5%	5.3%	4.9%	9.6%	7.5%
<u>All Properties</u>	11.3%	11.9%	9.6%	12.5%	11.1%	13.5%	15.6%	14.5%

* 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: 1st Quarter 2007

Characteristics of Stay	Total <u>1Q</u> <u>2007</u>	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	Total <u>1Q</u> <u>2006</u>	Total <u>2Q</u> <u>2006</u>	Total <u>3Q</u> <u>2006</u>	Total <u>4Q</u> <u>2006</u>
Average Party Size *	2.1	2.1	2.1	2.1	2.1	2.2	2.0	2.0
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.5	3.6	3.7	3.1	4.7	3.6	3.3	3.5
Nights in Hotel	3.3	3.3	3.7	3.1	4.4	3.4	3.2	3.4
Rooms per Night *	1.3	1.3	1.3	1.3	1.3	1.4	1.3	1.4

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



Hotel Survey: 1st Quarter 2007

Visitor Expenditures	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Average Expenditure Per Visit								
Lodging	\$1,043	\$861	\$1,221	\$1,088	\$1,461	\$826	\$554	\$714
Restaurant/Bar	\$353	\$330	\$392	\$357	\$519	\$323	\$243	\$320
Gifts/Shopping	\$96	\$83	\$93	\$109	\$158	\$133	\$93	\$122
Entertainment/Recreation	\$63	\$50	\$81	\$59	\$106	\$31	\$38	\$65
Local Travel	\$142	\$145	\$181	\$115	\$207	\$143	\$122	\$129
Total Per Party	\$1,696	\$1,469	\$1,968	\$1,727	\$2,451	\$1,455	\$1,050	\$1,350
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$808	\$699	\$937	\$822	\$1,167	\$661	\$525	\$675
Total Per Person/ Per Day	\$245	\$212	\$253	\$265	\$265	\$195	\$164	\$199
Lodging	\$150	\$124	\$157	\$167	\$158	\$110	\$87	\$105
Restaurant/Bar	\$51	\$48	\$50	\$55	\$56	\$43	\$38	\$47
Gifts/Shopping	\$14	\$12	\$12	\$17	\$17	\$18	\$15	\$18
Entertainment/Recreation	\$9	\$7	\$10	\$9	\$11	\$4	\$6	\$10
Local Travel	\$20	\$21	\$23	\$18	\$22	\$19	\$19	\$19

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

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



Hotel Survey: 1st Quarter 2007

Visitor Expenditures	Pleasure							
	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Average Expenditure Per Visit								
Lodging	\$1,320	\$1,153	\$1,584	\$1,246	\$2,040	\$1,051	\$675	\$882
Restaurant/Bar	\$484	\$519	\$522	\$428	\$588	\$449	\$328	\$463
Gifts/Shopping	\$197	\$167	\$230	\$191	\$294	\$269	\$234	\$320
Entertainment/Recreation	\$82	\$62	\$113	\$79	\$126	\$66	\$101	\$107
Local Travel	\$189	\$202	\$257	\$133	\$270	\$152	\$125	\$164
Total Per Party	\$2,271	\$2,103	\$2,705	\$2,077	\$3,318	\$1,993	\$1,463	\$1,935
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$909	\$809	\$1,127	\$866	\$1,383	\$687	\$542	\$744
Total Per Person/Per Day	\$222	\$184	\$250	\$240	\$230	\$176	\$139	\$182
Lodging	\$129	\$101	\$147	\$144	\$142	\$93	\$64	\$83
Restaurant/Bar	\$47	\$45	\$48	\$50	\$41	\$40	\$31	\$43
Gifts/Shopping	\$19	\$15	\$21	\$22	\$20	\$24	\$22	\$30
Entertainment/Recreation	\$8	\$5	\$10	\$9	\$9	\$6	\$10	\$10
Local Travel	\$18	\$18	\$24	\$15	\$19	\$13	\$12	\$15

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

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



Hotel Survey: 1st Quarter 2007

Visitor Expenditures	Business							
	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Average Expenditure Per Visit								
Lodging	\$879	\$679	\$1,076	\$923	\$1,030	\$704	\$502	\$648
Restaurant/Bar	\$280	\$226	\$337	\$289	\$414	\$257	\$209	\$270
Gifts/Shopping	\$42	\$44	\$30	\$55	\$79	\$65	\$41	\$62
Entertainment/Recreation	\$50	\$42	\$69	\$44	\$82	\$12	\$17	\$47
Local Travel	\$115	\$112	\$149	\$91	\$154	\$130	\$119	\$115
Total Per Party	\$1,366	\$1,102	\$1,660	\$1,401	\$1,758	\$1,169	\$887	\$1,141
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$759	\$689	\$922	\$779	\$1,005	\$687	\$555	\$634
Total Per Person/Per Day	\$271	\$265	\$279	\$299	\$320	\$222	\$191	\$204
Lodging	\$174	\$163	\$181	\$197	\$187	\$134	\$108	\$116
Restaurant/Bar	\$56	\$54	\$57	\$62	\$75	\$49	\$45	\$48
Gifts/Shopping	\$8	\$11	\$5	\$12	\$14	\$12	\$9	\$11
Entertainment/Recreation	\$10	\$10	\$12	\$9	\$15	\$2	\$4	\$8
Local Travel	\$23	\$27	\$25	\$19	\$28	\$25	\$26	\$21

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

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



Hotel Survey: 1st Quarter 2007

Planning the Trip to Palm Beach County	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Reason for Trip								
Conference/Convention/ Business Meeting	55.1%	58.6%	57.9%	48.7%	55.4%	63.3%	65.8%	72.2%
- Business Meeting	49.1%	51.8%	54.9%	40.7%	47.5%	54.0%	59.1%	60.7%
- Conference/Convention	5.7%	6.8%	2.2%	8.1%	6.9%	7.3%	4.8%	10.2%
- Other Business	0.3%	0.0%	0.8%	0.0%	1.1%	2.0%	1.8%	1.3%
Vacation/Pleasure	34.9%	34.4%	30.9%	39.3%	36.3%	31.5%	24.9%	21.5%
Sporting Event	4.4%	3.0%	4.0%	6.3%	5.2%	1.8%	2.4%	3.0%
Film/TV location scouting/production	1.4%	0.8%	0.0%	3.6%	0.0%	0.0%	0.1%	0.0%
Cultural Event/Attraction	0.8%	1.1%	1.3%	0.0%	0.0%	0.5%	0.7%	0.4%
Other	3.4%	2.2%	6.0%	1.7%	2.1%	2.8%	6.0%	3.0%
Who Made the Decision*								
Employer	54.1%	54.5%	55.8%	52.3%	54.9%	62.7%	61.6%	67.0%
Head of Household/ Other adult	40.5%	39.0%	37.4%	45.1%	41.1%	31.8%	32.7%	26.3%
Family Living in PBC	6.8%	7.1%	7.5%	5.6%	4.9%	5.8%	5.7%	6.4%
Children Influenced Decision	0.8%	0.3%	1.2%	1.1%	1.8%	1.1%	1.4%	0.5%
Advanced Planning								
One Month or Less	52.1%	55.5%	57.4%	43.2%	50.6%	56.6%	70.0%	59.9%
2 to 3 Months	23.2%	21.7%	21.7%	26.3%	24.3%	24.8%	16.6%	22.1%
More than 3 Months	24.7%	22.8%	21.0%	30.5%	25.1%	18.5%	13.5%	18.0%

* Multiple responses accepted.



Hotel Survey: 1st Quarter 2007

Planning the Trip to Palm Beach County (Continued)	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	54.9%	58.4%	57.1%	49.4%	55.9%	61.6%	62.8%	68.6%
Visit Friends/Relatives	19.5%	18.2%	17.8%	22.4%	21.1%	19.1%	17.4%	14.2%
Previous Visit	14.2%	14.6%	15.8%	12.4%	10.9%	8.6%	11.1%	9.3%
Weather	9.3%	11.7%	4.5%	11.4%	9.8%	8.6%	3.2%	2.2%
Convenient Flights	8.9%	9.2%	7.5%	9.9%	7.4%	7.1%	5.8%	3.2%
Beaches	7.5%	9.5%	2.2%	10.7%	4.2%	6.5%	3.0%	2.1%
Special Event	7.4%	6.4%	5.9%	9.9%	4.4%	6.9%	3.9%	5.4%
Golf/Tennis/Recreation	3.3%	2.3%	4.7%	2.8%	5.5%	3.0%	1.7%	2.9%
Friends/Relatives recommendation	3.2%	3.8%	0.7%	4.9%	3.5%	4.1%	2.3%	1.4%
Spring Training	2.4%	0.0%	0.0%	7.0%	1.6%	0.4%	0.0%	0.0%
Hotel Brochure/Website	2.2%	1.8%	0.9%	3.7%	0.6%	1.5%	0.4%	1.4%
Attend Sporting Event	2.0%	1.2%	1.9%	2.8%	2.7%	0.9%	1.6%	1.3%
Compete in Sporting Event	1.4%	0.5%	2.0%	1.9%	0.4%	0.7%	0.1%	0.2%
Art/Cultural Event	0.9%	1.3%	0.7%	0.7%	1.3%	1.0%	1.2%	0.6%
Attraction Brochure/Website	0.7%	0.5%	0.0%	1.5%	0.5%	0.8%	0.4%	0.5%
Other Internet Sources	0.5%	0.5%	0.4%	0.8%	0.7%	0.5%	0.6%	0.2%
Bus Tour	0.2%	0.5%	0.0%	0.0%	0.1%	0.1%	0.2%	0.3%
Travel Agency	0.1%	0.0%	0.4%	0.0%	0.6%	0.3%	0.1%	0.1%
PBC-CVB Information/Website	0.1%	0.0%	0.0%	0.3%	0.1%	0.1%	0.1%	0.0%
County/State Tourist Agency	0.1%	0.0%	0.0%	0.4%	0.1%	0.0%	0.0%	0.0%
Media Coverage	0.1%	0.0%	0.0%	0.4%	0.1%	0.2%	0.0%	0.0%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Other	3.0%	2.8%	3.3%	2.8%	5.1%	3.3%	4.8%	4.7%

* Multiple responses accepted.



Hotel Survey: 1st Quarter 2007

Booking Tools	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Booked Trip with Travel Agency								
Yes	23.7%	26.2%	23.6%	21.2%	26.1%	25.6%	24.7%	28.3%
No	76.3%	73.8%	76.4%	78.8%	73.9%	74.4%	75.3%	71.7%
Booked Any Part of Trip Using Internet								
Yes	44.9%	44.9%	44.5%	45.1%	44.1%	46.0%	48.6%	42.3%
No	55.1%	55.1%	55.5%	54.9%	55.9%	54.0%	51.4%	57.7%
Booked Any Part of Trip Using Internet* (among those who used the Internet)								
Air	76.1%	77.6%	78.0%	72.7%	79.2%	74.2%	64.7%	71.6%
Hotel	64.8%	59.0%	63.1%	72.0%	55.2%	61.3%	71.5%	65.4%
Hotel website	28.4%	29.8%	23.1%	32.0%	31.8%	27.6%	35.4%	34.8%
Expedia	2.5%	1.1%	4.0%	2.6%	2.6%	4.2%	1.9%	1.6%
Travelocity	2.2%	2.8%	1.6%	2.4%	1.0%	3.9%	4.8%	2.8%
hotels.com	1.8%	1.8%	1.9%	1.6%	1.2%	1.3%	2.2%	2.2%
Hotwire	1.3%	1.1%	1.1%	1.8%	0.3%	0.3%	0.4%	0.4%
Orbitz	1.2%	0.8%	1.1%	1.8%	2.0%	2.1%	0.5%	1.1%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.7%
Other Website	6.9%	3.5%	5.0%	12.2%	4.5%	4.5%	6.3%	4.4%
Don't Remember	20.4%	18.1%	25.4%	17.6%	11.7%	17.1%	20.0%	17.7%
Car Rental	41.7%	47.4%	39.7%	37.9%	38.7%	40.3%	42.1%	40.8%
Tickets to Event	0.5%	0.0%	0.0%	1.4%	2.0%	1.0%	1.7%	0.8%
Other	4.4%	6.8%	2.6%	3.6%	3.6%	5.6%	4.5%	2.9%
Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)								
Yes	7.2%	5.0%	5.9%	10.0%	10.3%	10.1%	5.7%	7.7%
No	92.8%	95.0%	94.1%	90.0%	89.7%	89.9%	94.3%	92.3%

* Multiple responses accepted.



Hotel Survey: 1st Quarter 2007

Activity Participation	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Participation in Specific Activities*								
Restaurants	93.4%	95.3%	93.4%	91.6%	92.4%	93.0%	92.5%	94.1%
Shopping	33.1%	33.2%	31.8%	34.2%	38.9%	33.5%	28.3%	25.9%
Went to Beach	26.7%	24.8%	21.9%	33.3%	26.3%	30.7%	24.1%	17.3%
Bars/Nightclubs	14.0%	11.0%	16.1%	14.8%	12.5%	13.2%	8.6%	10.1%
Swimming	13.2%	12.5%	11.5%	15.6%	11.7%	24.2%	13.6%	9.9%
Golf, Tennis	11.8%	11.5%	12.2%	11.8%	18.8%	8.7%	6.5%	9.1%
Visited downtown West Palm Beach Attractions/City Place	11.5%	11.6%	11.2%	11.8%	12.1%	12.2%	8.3%	10.9%
Visited Downtown Delray Beach Attractions	7.7%	7.7%	4.6%	10.7%	8.6%	7.7%	4.5%	5.8%
Visited Mizner Park/Boca Raton	4.5%	5.4%	2.4%	5.6%	9.7%	8.3%	2.9%	4.3%
Attended a Sporting Event	4.4%	0.5%	1.8%	11.1%	3.6%	1.8%	1.0%	1.0%
Museums, Art Galleries	4.3%	7.3%	2.6%	3.1%	6.8%	3.8%	1.4%	0.7%
Visited Wildlife Refuge	2.9%	2.9%	2.3%	3.5%	3.7%	3.9%	1.5%	2.1%
Attractions	2.3%	3.1%	1.3%	2.3%	3.3%	3.4%	0.7%	0.6%
Boating	1.9%	2.0%	0.5%	3.1%	1.8%	3.2%	1.1%	0.9%
Visited Downtown at the Gardens	1.6%	2.7%	0.0%	2.1%	2.8%	1.7%	0.4%	1.8%
Visited downtown Lake Worth	1.6%	2.0%	0.5%	2.4%	2.2%	1.9%	0.3%	1.2%
Fishing	1.5%	2.7%	0.0%	1.7%	1.8%	0.9%	0.5%	1.6%
Visited Riviera Beach/Singer Island	1.0%	0.5%	0.5%	2.1%	1.8%	1.5%	0.7%	1.0%
Performing Arts (plays, concerts, dance)	0.9%	0.9%	1.2%	0.7%	3.0%	2.0%	0.7%	2.2%
Competed in Sports Event	0.6%	0.3%	1.1%	0.3%	0.9%	0.6%	0.3%	0.3%
Surfing	0.4%	0.0%	0.4%	0.8%	0.6%	0.3%	0.4%	0.1%
Gambling Cruise	0.3%	0.0%	1.0%	0.0%	0.7%	0.7%	0.5%	0.4%
Snorkeling	0.3%	0.0%	0.8%	0.0%	1.0%	1.2%	0.6%	0.3%
Diving	0.3%	0.5%	0.4%	0.0%	0.3%	1.0%	0.3%	0.2%
Pari-mutuels (dog-track)	0.3%	0.0%	1.0%	0.0%	0.4%	0.1%	0.7%	0.1%
Palm Beach County Convention Center	0.3%	0.3%	0.0%	0.4%	0.4%	0.4%	0.0%	0.1%
Kite Surfing	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.2%
Other	5.5%	3.6%	9.0%	4.8%	7.6%	5.6%	5.2%	7.6%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2007

Return Visits	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Plan to Return to PBC								
Yes	84.5%	88.1%	84.4%	80.7%	78.1%	82.0%	83.9%	82.7%
No	2.5%	2.5%	2.7%	2.3%	3.2%	3.1%	2.3%	3.7%
Don't know	13.0%	9.4%	12.9%	17.0%	18.7%	14.9%	13.8%	13.6%
If no, why not?*								
(Top mentions – 5% or higher)	n = 19	n = 6	n = 7	n = 6		n = 21	n = 17	n = 27
No business in the area	20.0%	2	1	1	N/A	23.3%	25.1%	11.1%
Moving away/To another country	9.3%	1	1	0	N/A	0.0%	0.0%	0.0%
Too far	6.1%	0	1	0	N/A	0.0%	0.0%	15.3%
Not ideal location	6.1%	1	0	0	N/A	0.0%	0.0%	0.0%
Time Restraints	6.1%	1	0	0	N/A	0.0%	0.0%	0.0%
Too expensive	0.0%	0	0	0	N/A	0.0%	6.6%	8.3%
Family moving away	0.0%	0	0	0	N/A	4.8%	0.0%	7.1%
Job hunting	0.0%	0	0	0	N/A	0.0%	7.3%	4.1%
Probate office people are rude	0.0%	0	0	0	N/A	0.0%	7.3%	0.0%
Did not like Singer Island	0.0%	0	0	0	N/A	0.0%	6.6%	0.0%
No fun	0.0%	0	0	0	N/A	0.0%	6.5%	0.0%
No interest	0.0%	0	0	0	N/A	0.0%	5.0%	0.0%
Going to other places/I like changing destinations	0.0%	0	0	0	N/A	24.1%	0.0%	0.0%
No reason/No answer	38.5%	1	1	5	N/A	42.9%	31.3%	30.2%
When do you plan on returning to PBC?								
Within the next 3 months	29.7%	30.6%	37.8%	20.4%	26.2%	30.4%	42.2%	39.7%
Within the next 6 months	10.3%	9.6%	10.1%	11.4%	8.1%	12.2%	12.0%	12.1%
Within the next year	29.7%	28.7%	25.2%	35.7%	30.4%	22.3%	16.2%	19.0%
Within the next few years	6.1%	6.0%	4.8%	7.3%	10.1%	7.1%	4.2%	4.3%
Don't Know	24.2%	25.1%	22.1%	25.2%	25.3%	27.9%	25.4%	24.9%

*Multiple responses accepted.

** Raw numbers shown due to low base size



Hotel Survey: 1st Quarter 2007

Travel Details	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
<u>Main Destination</u>								
Palm Beach County	89.0%	88.4%	89.2%	89.5%	90.6%	91.3%	92.8%	92.2%
<u>First Trip to PBC</u>	19.8%	20.7%	19.7%	19.1%	26.7%	26.9%	26.7%	25.4%
<u>Type of Transportation*</u>								
Airplane	80.2%	79.3%	84.4%	76.9%	81.8%	80.1%	70.7%	74.1%
Car	24.5%	24.7%	20.2%	28.6%	23.9%	24.2%	33.1%	30.6%
Other	1.3%	0.4%	1.5%	1.7%	0.8%	1.1%	0.6%	0.7%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2007

Influence of Rising Costs	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
<u>Influence of fuel cost</u>								
5 – Strong consideration	5.7%	2.3%	6.9%	8.0%	6.6%	5.6%	5.5%	4.1%
4	3.7%	4.2%	2.3%	4.6%	5.2%	4.2%	6.6%	4.0%
3	11.1%	11.5%	10.2%	11.4%	10.5%	8.1%	10.7%	9.6%
2	6.0%	4.7%	4.9%	8.3%	6.6%	7.0%	5.8%	2.5%
1 – No consideration at all	45.5%	53.7%	48.8%	33.3%	56.3%	51.5%	47.4%	54.2%
I don't make the decision	28.1%	23.7%	26.8%	34.3%	14.7%	23.5%	24.0%	25.6%
<u>Influence of generally increasing travel costs</u>								
5 – Strong consideration	5.2%	2.2%	7.0%	6.6%	N/A	5.3%	5.0%	4.7%
4	3.5%	4.2%	3.4%	2.8%	N/A	5.2%	6.5%	3.5%
3	13.2%	13.1%	11.7%	14.7%	N/A	10.1%	11.7%	10.2%
2	6.5%	3.5%	5.8%	10.3%	N/A	8.5%	7.4%	3.9%
1 – No consideration at all	42.5%	51.1%	46.2%	29.8%	N/A	44.7%	44.6%	49.7%
I don't make the decision	29.1%	25.9%	26.0%	35.9%	N/A	26.2%	24.9%	28.1%



Hotel Survey: 1st Quarter 2007

Attitudes about Trip to Palm Beach County	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Things Liked Best – Top Mentions								
Climate/Weather	48.9%	54.2%	46.7%	45.6%	49.5%	35.1%	25.3%	42.0%
Beaches/Ocean	10.8%	9.2%	8.5%	14.6%	7.9%	12.3%	18.7%	9.5%
Beautiful Area/Nice Place	6.8%	9.5%	6.5%	4.4%	5.6%	6.0%	8.5%	7.5%
Nice People	4.0%	3.8%	4.1%	4.1%	4.2%	4.0%	4.7%	4.9%
Relaxing Atmosphere	3.6%	3.1%	5.2%	2.6%	2.7%	4.8%	3.5%	2.3%
Golf	3.3%	2.5%	2.9%	4.5%	1.8%	1.9%	1.8%	2.7%
Visiting Friends/Friends	2.9%	2.5%	3.2%	3.0%	3.2%	4.0%	4.2%	3.7%
Restaurant	2.6%	1.5%	4.1%	2.3%	1.9%	3.6%	2.9%	2.2%
Cleanliness	2.4%	3.1%	1.6%	2.5%	3.2%	4.7%	4.6%	4.6%
Everything	1.9%	0.9%	2.9%	1.8%	1.4%	3.3%	1.4%	1.3%
Hotel	1.9%	0.6%	2.0%	3.2%	3.7%	4.0%	4.1%	2.7%
Shopping	1.5%	1.1%	1.0%	2.3%	1.1%	1.6%	1.8%	2.8%
Convenience	1.2%	0.5%	1.2%	2.0%	1.6%	1.4%	1.6%	0.5%
Other	8.2%	7.5%	10.1%	7.1%	12.2%	13.3%	16.9%	13.3%



Hotel Survey: 1st Quarter 2007

Attitudes about Trip to Palm Beach County	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Things Liked Least – Top Mentions								
Traffic/Bad Drivers	41.6%	42.3%	41.5%	41.0%	40.2%	36.5%	30.6%	36.8%
Humidity/Poor Weather	9.6%	11.4%	12.8%	4.8%	9.7%	19.0%	28.3%	14.9%
Road Construction	2.8%	4.3%	3.2%	0.8%	3.8%	2.9%	4.4%	4.1%
Expensive	5.8%	6.9%	8.2%	2.6%	4.7%	5.1%	3.7%	3.0%
Stay Was Too Short	1.6%	0.9%	0.8%	3.2%	2.2%	1.1%	2.7%	2.2%
Hotel (general)	1.6%	1.3%	1.1%	2.3%	2.6%	3.0%	2.3%	2.2%
Crowded	3.6%	4.9%	0.8%	4.6%	4.0%	3.9%	1.7%	1.5%
Unfriendly People	1.6%	0.9%	1.6%	2.5%	0.5%	3.0%	1.1%	1.5%
Lack of Directional Signs	0.3%	0.0%	0.0%	0.8%	2.1%	0.5%	0.5%	0.9%
Cost of Hotel	2.2%	1.3%	2.4%	4.4%	3.8%	0.6%	0.2%	0.7%
Parking	0.9%	0.0%	0.8%	2.0%	0.5%	0.3%	0.3%	0.7%
Airport	0.7%	0.0%	0.0%	2.1%	0.0%	0.3%	0.3%	0.0%
Work	1.7%	1.5%	3.7%	0.0%	1.9%	0.6%	0.5%	0.0%
Train track/Train noise	0.6%	0.0%	2.1%	0.0%	0.0%	0.3%	0.3%	0.3%
Other	14.2%	9.7%	18.4%	13.9%	12.4%	13.7%	15.6%	17.1%
<u>Nothing liked least</u>	11.2%	14.6%	2.6%	15.0%	11.6%	9.2%	7.5%	14.1%



Hotel Survey: 1st Quarter 2007

Attitudes about Trip to Palm Beach County	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Suggestions for Improvement - Top Mentions*								
Longer stay	22.3%	20.3%	21.7%	27.2%	18.4%	21.2%	28.8%	15.6%
Better weather	13.7%	12.5%	19.5%	3.7%	18.0%	11.4%	11.8%	8.1%
Improve traffic/Finish Construction on I-95	7.1%	9.4%	6.4%	4.2%	10.0%	11.3%	7.2%	9.4%
Come during vacation time	6.9%	7.1%	9.2%	1.6%	5.8%	6.3%	7.9%	12.5%
Come with friends/family	6.2%	11.7%	4.4%	0.0%	3.7%	4.8%	3.6%	5.5%
Less business and more partying/more free time	3.0%	6.0%	1.1%	1.6%	1.5%	9.3%	6.9%	13.2%
Better hotel	4.1%	3.5%	5.0%	3.3%	4.6%	1.6%	3.6%	2.2%
Cheaper hotel	2.9%	0.0%	2.8%	8.6%	4.8%	1.7%	1.1%	1.2%
Nothing	7.6%	5.0%	4.7%	18.4%	9.3%	8.5%	6.5%	8.3%
Other	26.2%	24.5%	25.2%	31.4%	23.9%	23.9%	22.6%	24.0%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2007

Characteristics of Visitors	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
Age								
Under 35	15.6%	15.9%	18.2%	12.6%	14.5%	18.5%	18.8%	19.4%
35 to 54	51.6%	50.6%	50.1%	54.2%	49.8%	57.3%	58.8%	52.9%
55 to 64	21.8%	18.8%	23.8%	22.8%	21.4%	18.2%	16.1%	22.0%
65 +	11.0%	14.7%	7.8%	10.5%	14.2%	6.0%	6.3%	5.7%
Occupation								
Professional/Managerial	63.5%	64.4%	60.0%	66.3%	60.7%	60.2%	63.1%	63.5%
Sales	14.7%	12.8%	16.1%	15.2%	12.4%	16.4%	16.1%	14.6%
Retired	10.8%	13.6%	8.6%	10.3%	15.9%	7.3%	7.6%	6.3%
Technical	5.8%	4.2%	8.8%	4.5%	5.2%	8.8%	8.1%	10.0%
Student	1.0%	1.2%	0.5%	1.4%	1.8%	1.3%	0.9%	0.8%
Other	4.1%	3.8%	6.0%	2.3%	4.0%	6.1%	4.1%	4.9%
Hispanic Origin	4.0%	5.0%	2.5%	4.7%	2.3%	6.7%	7.0%	5.0%
Ethnicity								
White/Caucasian	92.9%	95.2%	92.3%	91.1%	94.4%	91.8%	90.4%	90.5%
African-American/Black	5.2%	2.2%	6.6%	6.8%	3.1%	4.9%	5.7%	5.3%
Asian	1.8%	2.1%	1.1%	2.0%	2.6%	2.8%	3.8%	3.5%
Other	0.2%	0.5%	0.0%	0.0%	0.0%	0.6%	0.1%	0.7%



Hotel Survey: 1st Quarter 2007

Characteristics of Visitors (Continued)	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
<u>Income</u>								
Under \$45,000	4.5%	3.9%	4.6%	5.1%	3.3%	3.3%	5.3%	4.3%
\$45,000 to \$64,999	6.2%	6.1%	5.2%	7.5%	7.9%	10.7%	11.9%	9.4%
\$65,000 to \$99,999	21.9%	16.9%	22.1%	26.7%	19.4%	21.3%	26.4%	21.2%
\$100,000 to \$200,000	39.8%	44.0%	43.5%	31.6%	40.0%	42.3%	41.3%	42.2%
Over \$200,000	27.5%	29.1%	24.5%	29.1%	29.4%	22.4%	15.1%	23.0%
<u>Description of Travel Party*</u>								
Adult family members or friends	41.6%	40.7%	39.0%	45.0%	47.4%	38.2%	33.7%	29.6%
Self Only	31.6%	35.6%	30.9%	28.4%	28.8%	33.0%	40.1%	37.3%
Business Associates	26.5%	23.8%	28.6%	27.1%	23.7%	28.0%	24.6%	32.5%
Children <12 years of age	7.7%	8.5%	9.8%	5.0%	5.0%	8.1%	6.9%	4.6%
Grandchildren <12 years of age	0.2%	0.4%	0.4%	0.0%	0.3%	0.3%	0.3%	0.1%
<u>Gender</u>								
Male	56.3%	54.7%	60.9%	53.2%	58.2%	59.7%	60.6%	59.7%
Female	43.7%	45.3%	39.1%	46.8%	41.8%	40.3%	39.4%	40.3%

*Multiple responses accepted.



Hotel Survey: 1st Quarter 2007

Place of Origin	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
<u>Domestic</u>	91.2% (n=664)	88.8%	88.3%	96.6%	92.2% (n=680)	90.8% (n=671)	91.9% (n=673)	92.5% (n=677)
Southeast	17.6% (n=128)	17.2%	14.7%	20.7%	17.3% (n=128)	18.3% (n=136)	20.1% (n=147)	14.9% (n=109)
Midwest	16.9% (n=123)	15.4%	15.9%	19.3%	17.3% (n=128)	14.3% (n=106)	14.2% (n=104)	18.0% (n=131)
Florida	16.4% (n=120)	15.9%	16.4%	17.1%	12.3% (n=91)	18.1% (n=134)	26.7% (n=195)	24.8% (n=182)
Mid Atlantic	15.2% (n=111)	17.2%	10.9%	17.3%	16.8% (n=124)	12.6% (n=93)	11.2% (n=82)	12.1% (n=89)
New York	9.4% (n=69)	10.6%	10.7%	6.9%	15.0% (n=110)	11.9% (n=88)	7.0% (n=51)	8.3% (n=61)
New England	9.2% (n=67)	7.8%	10.8%	9.0%	8.5% (n=63)	6.8% (n=50)	4.1% (n=30)	6.6% (n=49)
Far West	6.6% (n=48)	4.6%	8.9%	6.3%	4.9% (n=36)	8.8% (n=65)	8.6% (n=63)	7.7% (n=56)
<u>International</u>	8.8% (n=64)	11.2%	11.7%	3.4%	7.8% (n=58)	9.2% (n=68)	8.1% (n=59)	7.5% (n=55)
Europe (net)	3.7% (n=27)	4.2%	6.3%	0.7%	3.8% (n=28)	4.5% (n=34)	3.8% (n=28)	3.7% (n=27)
- England/UK	1.6% (n=12)	2.8%	1.3%	0.7%	1.7% (n=13)	2.3% (n=17)	1.7% (n=12)	1.9% (n=14)
- Germany	1.0% (n=7)	0.5%	2.7%	0.0%	1.2% (n=9)	0.4% (n=3)	0.3% (n=2)	0.5% (n=3)
Canada	2.7% (n=20)	3.8%	2.8%	1.5%	2.7% (n=20)	1.6% (n=12)	1.9% (n=14)	1.0% (n=7)
Latin America / Caribbean	1.9% (n=14)	2.3%	2.7%	0.8%	0.7% (n=5)	2.0% (n=15)	1.8% (n=13)	1.8% (n=13)
Australia/Asia	0.4% (n=3)	0.9%	0.0%	0.4%	0.1% (n=1)	0.8% (n=6)	0.6% (n=4)	0.7% (n=5)
Middle East	0.0% (n=0)	0.0%	0.0%	0.0%	0.5% (n=4)	0.3% (n=2)	0.1% (n=1)	0.3% (n=2)
Africa	0.0% (n=0)	0.0%	0.0%	0.0%	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)



Hotel Survey: 1st Quarter 2007

Pleasure Vs. Business By Selected Place of Origin	Total 1Q 2007	Jan.	Feb.	Mar.	Total 1Q 2006	Total 2Q 2006	Total 3Q 2006	Total 4Q 2006
<u>Florida</u>	16.4%	15.9%	16.4%	17.1%	12.3%	18.1%	26.7%	24.8%
Business	10.2%	10.7%	12.1%	7.3%	8.9%	13.9%	18.6%	20.0%
Pleasure	6.0%	4.9%	3.8%	9.4%	3.3%	4.1%	7.7%	4.8%
<u>Midwest</u>	16.9%	15.4%	15.9%	19.3%	17.3%	14.3%	14.2%	18.0%
Business	9.6%	7.8%	11.7%	9.8%	11.0%	9.2%	10.1%	13.7%
Pleasure	6.9%	7.8%	3.8%	9.4%	6.0%	5.1%	4.1%	4.2%
<u>Southeast</u>	17.6%	17.2%	14.7%	20.7%	17.3%	18.3%	20.1%	14.9%
Business	12.1%	11.9%	10.0%	14.7%	12.5%	14.6%	14.9%	12.2%
Pleasure	5.1%	5.3%	3.8%	6.1%	4.7%	3.7%	5.1%	2.6%
<u>Mid Atlantic</u>	15.2%	17.2%	10.9%	17.3%	16.8%	12.6%	11.2%	12.1%
Business	7.1%	9.1%	3.3%	9.0%	7.3%	5.8%	6.1%	8.1%
Pleasure	7.6%	7.8%	6.7%	8.2%	9.5%	6.6%	4.5%	3.7%
<u>New York</u>	9.4%	10.6%	10.7%	6.9%	15.0%	11.9%	7.0%	8.3%
Business	3.6%	4.9%	3.3%	2.4%	4.7%	4.2%	2.3%	4.4%
Pleasure	5.8%	5.7%	7.1%	4.5%	10.2%	7.7%	4.2%	3.8%
<u>Far West</u>	6.6%	4.6%	8.9%	6.3%	4.9%	8.8%	8.6%	7.7%
Business	4.1%	3.7%	4.6%	4.1%	3.9%	7.4%	6.7%	5.9%
Pleasure	2.5%	0.8%	4.2%	2.4%	0.9%	1.4%	1.5%	1.6%
<u>New England</u>	9.2%	7.8%	10.8%	9.0%	8.5%	6.8%	4.1%	6.6%
Business	4.7%	4.5%	6.3%	3.3%	3.8%	2.7%	2.9%	4.0%
Pleasure	4.5%	3.3%	4.6%	5.7%	4.7%	3.7%	1.0%	2.6%