



Report on Palm Beach County Tourism Second Quarter 2009 (April, May, and June)

Prepared for:
Tourist Development Council of Palm Beach County

Prepared by:
PROFILE
MARKETING RESEARCH
4020 S. 57th Avenue
Lake Worth, FL 33463
(561)965-8300
www.profile-mktg-res.com

August 12, 2009



Introduction: 2nd Quarter 2009

Background

- The following report contains information collected during the 2nd Quarter of 2009 (April, May and June), third quarter of Fiscal Year 2008/2009.
- 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: 2nd Quarter 2009

Occupancy Rates

- **During the second quarter of 2009, the average occupancy rate for responding Palm Beach County hotels was 58.0%, a decrease of 7.5 percentage points from the same quarter last year (65.5%).**
 - In 2Q2009, the average occupancy rate was higher among larger (101+ rooms) properties (59.8%) than among smaller (50-100 rooms) properties (48.8%)*.
 - Among smaller hotels (50-100 rooms), the average occupancy rate decreased by 3.9 percentage points compared with last year, from 2Q2008 (52.7%) to 2Q2009 (48.8%), and decreased by 16.0 percentage points compared with last quarter, from 1Q2009 (64.8%) to 2Q2009 (48.8%).
 - Among larger hotels (101+ rooms), the average occupancy rate decreased by 8.0 percentage points compared with last year, from 2Q2008 (67.8%) to 2Q2009 (59.8%), and decreased by 10.3 percentage points compared with last quarter, from 1Q2009 (70.1%) to 2Q2009 (59.8%).
- **For the first time since 3Q2008, properties in the Northern region experienced the highest average occupancy rate (60.5%) in Palm Beach County (Central – 59.7% and Southern – 55.4%).**
 - Hotels in all regions experienced decreases in average occupancy relative to last year (Southern – down 8.9 percentage points from 64.3%; Central – down 6.7 percentage points from 66.4%; Northern – down 5.4 percentage points from 65.9%).
 - Additionally, the average occupancy rate decreased among properties in all three regions compared to last quarter, with the most significant decrease occurring in the Central region (Central – a 15.3 percentage point decrease from 75.0%, Southern – a 9.4 percentage point decrease from 55.7%, Northern – a 6.4 percentage point decrease from 66.9%).
- **During the second quarter of 2009 the approximate number of hotel room nights occupied** was 789,895 – a decrease of 86,343 (9.9%) room nights relative to 2Q2008 (876,238) and a decrease of 134,058 (14.5%) room nights compared to 1Q2009 (923,953).**
- **According to hotel managers surveyed in 2Q2009, 7.0% of hotel guests traveled internationally. This is comparable to last quarter (5.5%) and the same quarter last year (4.8%).**
 - Property managers from smaller hotels (50-100 rooms)* stated that, on average, 16.8% of their guests traveled from outside of the United States, while managers from larger properties (101+ rooms) claimed that, on average, 5.2% of their guests were international travelers.
 - In the second quarter of 2009, each of the three regions in Palm Beach County experienced slight increases in the percentage of guests traveling internationally when compared to the same quarter last year. Property managers in the Northern region reported an increase of 2.2 percentage points (from 2.5% to 4.7%), those in the Central region reported an increase of 2.1 percentage points (from 4.9% to 7.0%), and those in the Southern region reported an increase of 2.0 percentage points (from 5.9% to 7.9%).

* Please note that the response rate for hotels with 50-100 rooms was low in April (25.8%), May (23.4%) and June (25.3%).

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



Property Manager Survey: 2nd Quarter 2009

Occupancy Rates (cont'd)

- During 2Q2009, leisure travelers occupied the greatest percentage of room nights in Palm Beach County (41.5%), which represents a 5.9 percentage point increase from 2Q2008 (35.7%). Business travelers occupied 32.8% of room nights, which is at parity with last year (32.9%). Convention/group travelers occupied 25.7% of 2Q2009 hotel room nights, which represents a 5.8 percentage point decrease from 2Q2008 (31.5%).
- Hotel managers specifically from convention hotels related that 28.9% of their reservations were made by convention/group traveler, at parity with last quarter (26.6%) and a 6.7 percentage point decrease relative to 2Q2008 (35.6%).

Average Daily Room Rate (ADR)

- As reported by participating Palm Beach County property managers, the ADR for PBC properties in 2Q2009 was \$131.70 – this represents a 14.8% (\$22.88) decrease compared to last year (\$154.58) and a 30.2% (\$56.85) decrease compared to last quarter (\$188.55).
 - In 2Q2009, hotel managers of smaller properties (50-100 rooms)[^] reported a larger decrease in ADR compared to last year (down 23.6 percentage points, from \$140.17 in 2Q2008 to \$107.10 in 2Q2009) than managers of larger properties (101+ rooms), who also reported a decrease in their ADR compared to last year (down 13.5 percentage points, from \$157.39 in 2Q2008 to \$136.19 in 2Q2009).
 - Within the larger properties, managers at hotels with 101-219 rooms reported an ADR of \$104.20, a decrease of 8.8 percentage points from 2Q2008 (\$114.20); hotel managers at hotels with 220-500 rooms cited an ADR of \$133.79, a decrease of 18.7 percentage points from 2Q2008 (\$164.54).
 - When compared to the previous quarter, hotel managers of smaller properties (50-100 rooms)[^] also reported larger decreases in ADR (down 43.1 percentage points, from \$188.13 in 1Q2009 to \$107.10 in 2Q2009) than managers of larger properties (101+ rooms) who reported a decrease of 28.1 percentage points when compared to last quarter (from \$189.30 in 1Q2009 to \$136.19 in 2Q2009).

Future Business Outlook

- Regarding the business outlook for the next two months as relative to the same months last year, most responding hotel managers expect a decrease in Total Room Revenue (84.6%), Group/Individual Business Room Revenue (81.8%), and Individual Vacation Room Revenue (78.9%). Although few surveyed hotel managers anticipate an increase in any revenue category, the percentage of managers anticipating an increase in Individual Vacation Room Revenue increased slightly in each consecutive month of 2Q2009 (April - 3.6%; May - 7.6%; June - 9.9%).^{*}
 - Among hotel managers who expect an increase in room revenue compared to the previous year, the average increase projected is 5.0% in Total Revenue, 6.4% in Group/Individual Business Revenue, and 22.1%** in Individual Vacation Revenue.^{*}
 - Among hotel managers who anticipate a decrease in room revenue relative to the previous year, the average decrease predicted is 20.5% in Total Revenue, 22.9% in Group/Individual Business Revenue, and 18.6% in Individual Vacation Revenue.^{*}

^{*} Based on those responding for each (total, group/individual business, individual vacation)

^{**} Caution: Extremely low base

[^] Please note that the response rate for hotels with 50-100 rooms was low in April (25.8%), May (23.4%) and June (25.3%). Also, when compared to previous quarters, fewer managers replied in 2Q2009 from hotels with higher rates (i.e. Chesterfield, Colony and Brazilian Court Hotels in Palm Beach) This may be a contributing factor to a lower ADR.



Property Manager Survey: 2nd Quarter 2009

Future Business Outlook (cont'd)

- When predicting changes in room revenue three and four months ahead, compared to the same months last year, most responding hotel managers are expecting a decrease in Total Room Revenue (84.1%), Group/Individual Business Room Revenue (79.0%), and Individual Vacation Room Revenue (79.0%). Few surveyed hotel managers anticipate an increase in any revenue category, though the percentage of managers anticipating an increase in Individual Vacation Room Revenue increased slightly in each consecutive month of 2Q2009 (April - 3.6%; May - 7.6%; June - 8.3%).
 - Among hotel managers who anticipate an increase in room revenue relative to the previous year, the average increase forecast is 14.2% in Total Revenue, 7.5% in Group/Individual Business Revenue, and 22.6%** in Individual Vacation Revenue.*
 - Among hotel managers who expect a decrease in room revenue compared to the prior year, the average decrease predicted is 20.1% in Total Revenue, 23.8% in Group/Individual Business Revenue, and 18.0% in Individual Vacation Revenue.*

Bookings Via Third Party Websites

- According to hotel managers, an average of 18.4% of Palm Beach County hotel bookings were made through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc.) in 2Q2009, this represents an increase from both last year (13.4%) and last quarter (15.1%).
 - In 2Q2009, there were more third party bookings at smaller hotels (50-100 rooms; 18.9%) than at larger hotels (101+ rooms; 15.9%).

Market Focus

- As in prior quarters, the major focus for hotel managers, in terms of marketing, advertising and promotion, was on the Florida Leisure Drive Market (73.9%).
- When asked about the greatest challenges for the remainder of 2009, responding hotel managers most often mentioned the economy in general. A full, detailed list can be found on pages 23 and 24.

* Based on those responding for each (total, group/individual business, individual vacation)

** Caution: Extremely low base



Hotel Visitor Survey: 2nd Quarter 2009

Characteristics of Stay

- During the second quarter of 2009, both the average party size and the median party size of PBC visitors was 2.0*, at parity with the prior quarter and the same time last year.
- PBC visitors spent 3.6 nights on average in a hotel during 2Q2009, which was an increase compared with last year (3.3) and a decrease compared with last quarter (3.9). Surveyed hotel guests occupied an average of 1.2 rooms per night* in 2Q2009.

Planning the Trip to Palm Beach County

- More than one-half (54.1%) of hotel guests surveyed in 2Q2009 cited a business trip (conference/convention/business meeting) as their reason for visiting PBC, while almost four-in-ten cited vacation/pleasure (38.2%).
 - The proportion of surveyed hotel guests reporting to be visiting PBC for either business or leisure/pleasure hasn't changed significantly compared to either the prior quarter (52.7% business, 38.7% leisure) or the same quarter last year (57.9% business, 36.5% leisure).
- Approximately one-half of surveyed hotel visitors cited 'Work Related Trip' as the reason they selected Palm Beach County instead of another destination (52.2%). 'Visit Friends/Relatives' (20.3%) and/or 'Previous Visit' (19.3%) were other responses frequently cited by guests.
 - The percentage of surveyed visitors citing 'Work Related Trip' as a reason for selecting PBC over other destinations decreased slightly compared to last year (56.5%) but was comparable to last quarter (50.6%). The citing of 'Visit Friends/Relatives' as a reason decreased slightly compared to last year (22.5%) and considerably since last quarter (26.1%).
- Corresponding to the high proportion of visitor travelers, more than one-half of participating 2Q2009 hotel guests cited 'Employer' as the decision maker regarding the trip to Palm Beach County (52.2%). Four-in-ten surveyed visitors claimed that their decision was made by the 'Head of Household/Other Adult' (39.9%).
 - The percentage of visitors citing 'Employer' as the decision maker (52.2%) was relatively comparable to both this same quarter last year (54.2%) and last quarter (50.4%). The percentage of visitors citing 'Head of Household/Other Adult' as the decision maker regarding the trip to Palm Beach County (39.9%) increased by 4.3 percentage points in comparison to last year (35.6%) and decreased by 4.9 percentage points from last quarter (44.8%).
- Nearly six-in-ten 2Q2009 surveyed hotel guests planned their trip to Palm Beach County one month or less in advance (58.8%), an increase compared to this same quarter last year (52.3%) and last quarter (54.3%).

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



Hotel Visitor Survey: 2nd Quarter 2009

Booking a Trip to Palm Beach County

- **Nearly one-quarter of participating hotel guests utilized a travel agent (24.4%) to book their trip to PBC in 2Q2009, comparable to last year (21.8%) and last quarter (23.2%).**
- **The percentage of hotel visitors reporting to have booked at least part of their trip to PBC on the Internet increased considerably in 2Q2009 (54.9%) relative to recent prior quarters (2Q2008 – 44.6%; 3Q2008 – 47.4%; 4Q2008 – 46.0%, 1Q2009 – 48.9%).**
 - Approximately eight-in-ten surveyed hotel guests who utilized the Internet to book any part of their trip to PBC did so to book hotel rooms (81.3%), six-in-ten reserved airfare (60.4%), and three-in-ten used the Internet to book a rental car (29.7%).
 - There was a considerable increase in the reservation of hotel rooms via the Internet in 2Q2009 (81.3%) compared to both last year (75.1%; a 6.2 percentage point increase) and last quarter (76.7%; a 4.6 percentage point increase); however, there was a decline in airfare reservations via the Internet (60.4%) compared to last year (68.4%) and last quarter (68.8%).
 - In 2Q2009, hotel guests who reserved their hotel rooms online most frequently did so via specific hotel websites (36.2%), an increase compared to the prior quarter (30.1%), but consistent with this same quarter last year (38.2%).
 - Only 4.6% of hotel guests surveyed during the second quarter of 2009 stated that their trip to Palm Beach County was part of a package (that may have included airfare, lodging, meals, rental car, etc), which is consistent with last quarter (5.2%), as well as the same quarter last year (5.5%). Interestingly, the percentage of hotel guests reporting their trip was part of a package sharply increased in June (7.0%) compared to April (2.8%) and May (2.7%).

Visitor Expenditures

- **During 2Q2009, the average per party expenditure in Palm Beach County was \$1,328, \$41 (3.2%) more than the average per party expenditure in the same quarter last year (\$1,287), but \$435 (24.7%) less than last quarter (\$1,763).**
 - The spending categories that experienced the largest increases compared to 2Q2008 were: 'Restaurant/Bar' (from \$350 to \$407, a 16.3 percentage point increase), and 'Gifts/Shopping' (from \$99 to \$115, a 16.2 percentage point increase).
 - 'Lodging' was the only spending category to decrease significantly compared to this same quarter last year (from \$700 to \$652, a 6.7 percentage point decrease).
 - During 2Q2009, the average per person expenditure was \$664, comparable with with 2Q2008 (\$644), but down 28.4 percentage points compared to last quarter (\$928).
- **On average, surveyed guests coming to PBC for pleasure spent \$1,603 per party in 2Q2009, while those traveling for business spent an average of \$1,117.**
 - Leisure and business travelers' per party expenditures both increased slightly relative to the same quarter last year. Leisure travelers per party expenditures increased by 4.0 percentage points, from 2Q2008 (\$1,541) to 2Q2009 (\$1,603), while business travelers per party expenditures increased by 1.7 percentage points, from 2Q2008 (\$1,098) to 2Q2009 (\$1,117).
 - Relative to last quarter, leisure travelers' per party spending decreased by 29.5 percentage points, from 1Q2009 (\$2,274) to 2Q2009 (\$1,603), and business travelers' per party spending decreased by 18.6 percentage points, from 1Q2009 (\$1,373) to 2Q2009 (\$1,117).

* 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: 2nd Quarter 2009

Characteristics of Visitors

- Most PBC visitors continued to categorize themselves as “White/Caucasian” (90.4%) in 2Q2009, consistent with previous quarters.
- While more than half of surveyed visitors to PBC fell between the ages of 35 and 54, this is a decrease compared to last year (from 56.8% in 2Q2008 to 51.1% in 2Q2009); at the same time visitors age 65 or older saw a slight increase (from 6.8% in 2Q2008 to 9.9% in 2Q2009).
- Consistent with prior quarters, most PBC visitors reported being occupied in professional/managerial occupations (59.0%).
- In 2Q2009, nearly two-thirds of surveyed hotel guests reported an annual household income of \$100,000 or more (63.2%), a sharp decrease from the prior quarter (73.5%), but only a slight decrease from the same quarter last year (65.6%).
- In 2Q2009, PBC visitors continued to report that their traveling parties mainly consisted of adult family members/ friends (44.7%) or self only (39.0%); those traveling for pleasure typically traveled to PBC with adult family members/friends (82.6%), while business travelers traveled by themselves most often (57.7%).

Travel Details

- The vast majority (95.2%) of surveyed visitors cited Palm Beach County as the main destination for their trip, an increase compared to this quarter last year (91.3%) and last quarter (90.2%).
- Slightly more than a quarter of surveyed hotel guests were first time visitors to PBC in 2Q2009 (27.6%), an increase compared to last quarter (22.2%) but comparable to last year (29.0%).
- Seven-in-ten surveyed hotel guests traveled by airplane to Palm Beach County in 2Q2009 (70.1%), which represents a 4.3 percentage point decrease from 2Q2008 (74.4%), and a 4.8 percentage point decrease from 1Q2009 (74.9%).
- Three-in-ten hotel guests traveled to PBC by car in 2Q2009 (33.3%), a slight increase compared to both 2Q2008 (30.5%) and 1Q2009 (31.0%).
- Domestic travelers continued to comprise the vast majority of PB visitors in 2Q2009 (89.7%), consistent with last year and last quarter (both 89.6%).

Attitudes toward Palm Beach County

- At 32.4%, ‘Climate/Weather’ continued to have been cited by surveyed hotel visitors during 2Q2009 as the aspect they liked the best about PBC.
- ‘Traffic/Bad Drivers’ (22.4%) and ‘Humidity/Poor Weather’ (21.7%) were the top mentioned dislikes about Palm Beach County in 2Q2009. The percentage of hotel guests mentioning ‘Traffic/Bad Drivers’ as the aspect of PBC they liked the least declined from April (30.5%) to May (23.6%) to June (18.2%), and was considerably lower than reported last quarter (31.7%).

Activity Participation

- In 2Q2009, dining in area restaurants continued to be mentioned most frequently as an activity in which PBC visitors participated (97.9%), and the percentage mentioning such actually increased compared to prior quarters (93.5% this same quarter last year, 95.6% last quarter). Shopping (30.9%), going to the beach (30.2%), and swimming (23.8%) were other popular activities guests enjoyed during their stay in PBC.
- Golfing (16.6%) and going to the beach (12.8%) were the two most frequently mentioned activities that surveyed visitors did on a recent trip that they wished they could do in PBC (both of which are currently available in PBC).



Hotel Visitor Survey: 2nd Quarter 2009

Hotel Visitor Study

Return Visits

- Nearly ninety-percent (89.4%) of hotel guests surveyed in 2Q2009 stated that they plan to return to PBC in the future, higher than any quarter in the past year (2Q2008 – 82.3%; 3Q2008 – 85.4%; 4Q2008 – 82.1%; 1Q2009 – 84.4%). Only 2.8% claimed they will not return, and the remainder (7.9%) were not sure if they will come back to PBC in the future or not.
 - Two-thirds of those who plan to visit Palm Beach County again plan on returning in the next year (65.8%), and one-third (33.6%) plan to return to PBC within the next three months.
 - Among those who do not plan to return to PBC, the top reasons cited in 2Q2009 include: 'poor service' (10.5%) and 'going to other places/I like changing destinations' (10.0%).

Vacation/Leisure Visitors

- While most leisure visitors surveyed in 2Q2009 reported that their last vacation destination was within the U.S. (61.8%), the percent reporting that their last vacation was domestic declined each month within 2Q2009 (71.4% in April, 68.2% in May, 47.5% in June). Locations in Florida (25.2%) and the Far West (16.2%) were the top domestic destinations mentioned.
- Over one-third of participating leisure hotel guests vacationed in a country abroad on their last trip (35.9%); countries in Latin America/Caribbean (16.3%) and Europe (11.0%) were visited most often.
- Over two-thirds of responding leisure visitors considered other domestic destinations when planning their vacation (69.7%). Nearly every domestic location considered was in Florida (67.8%).
- Throughout 2Q2009, PBC was typically seen as comparable to other recent vacation destinations. Responding leisure visitors claimed that PBC was about the same or better than their most recent vacation destination in terms of the following:
 - Being a great place to go again and again (94.7%)
 - Being able to always find a new place to see or a new thing to do (93.7%)
 - Being appreciated as a tourist or visitor (92.4%)
 - Being great for discovering nature-based activities/ecotourism (91.5%)
 - Being a good value (90.2%)
 - Being great for museums and other cultural activities (84.7%)
 - Being great for historical sights and places (75.0%)



Table of Contents

Property Manager Survey 11

- Methodology 12
- Occupancy Rate 13
- Room Nights Occupied 13
- Average Daily Room Rate 13
- Occupancy Rate Trends: FY2001/2002 thru 2008/2009 14
- Conference/Convention Bookings 15
- Available Inventory 15
- Response Rate 15
- Occupancy Rate by Hotel Size and Geographic Region 16
- Percent of international guests. 16
- Average Daily Room Rate by Hotel Size 17
- Occupied Room Nights 18
- Future Business Outlook 19
- Bookings Via Third Party Website 21
- Market Focus 22

Hotel Visitor Survey 25

- Methodology 26
- Characteristics of the Stay 30
- Visitor Expenditures 31
- Visitor Expenditures by Purpose of Visit 32
- Planning the Trip to Palm Beach County 34
- Booking Tools 36
- Activity Participation. 37
- Return Visits 38
- Travel Details 39
- Attitudes about the Trip to Palm Beach County. 40
- Palm Beach County Activity Suggestions. 42
- Last Vacation Destination. 43
- Other Vacation Destinations Considered. 44
- Comparison of Palm Beach County to last vacation. 45
- Characteristics of Visitors to Palm Beach County 46
- Place of Origin 49



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: 2nd Quarter 2009

	<u>Total 2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2008</u>	<u>Total 3Q 2008</u>	<u>Total 4Q 2008</u>	<u>Total 1Q 2009</u>
Occupancy Rate								
Month/Quarter	58.0%	63.8%	57.0%	53.2%	65.5%	53.6%	57.8%	69.2%
FYTD (Oct. - Sept.)	61.7%	63.6%	62.8%	61.7%	69.0%	65.2%	57.8%	63.5%
Room Nights Occupied^{1*}								
Month/Quarter	789,895	286,571	264,179	239,145	876,238	727,536	783,412	923,953
FYTD (Oct. - Sept.)	2,497,260	1,993,936	2,258,115	2,497,260	2,771,753	3,499,289	783,412	1,707,365
Percentage of Room Nights Occupied								
Leisure	41.5%	42.0%	40.5%	42.6%	35.7%	36.6%	38.3%	42.3%
Business	32.8%	32.1%	32.4%	33.4%	32.8%	36.9%	34.4%	32.9%
Convention/Group	25.7%	25.9%	27.1%	24.0%	31.5%	26.5%	27.4%	24.8%
Average Daily Room Rate²	\$131.70	\$163.83	\$121.45	\$105.17	\$154.58	\$121.39	\$150.60	\$188.55

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: 2nd Quarter 2009

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>01/02</u>	<u>02/03</u>	<u>03/04</u>	<u>04/05</u>	<u>05/06</u>	<u>06/07</u>	<u>07/08</u>	<u>08/09</u>
2nd Quarter (April/May/June)	65.1	67.0	71.8	72.7	71.0	68.5	65.5	58.0
April	71.1	72.0	79.7	79.1	73.6	73.8	69.5	63.8
May	62.9	65.6	67.5	68.5	70.8	65.7	64.6	57.0
June	61.1	63.7	67.7	70.0	68.9	65.6	62.1	53.2
3rd Quarter (July/Aug/Sept)	57.3	57.8	64.2	63.0	56.9	56.0	53.6	N/A
4th Quarter (Oct/Nov/Dec)	57.5	59.8	64.2	79.8	73.1	64.6	62.9	57.8
1st Quarter (Jan/Feb/Mar)	76.2	77.9	83.8	88.3	84.7	80.8	78.9	69.2
Fiscal YTD (Oct. – Sept.)	64.1	65.7	70.9	76.0	71.2	67.4	69.0	61.7
Number of Room Nights Occupied in 2nd Quarter*							876,238	789,895

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



Property Manager Survey: 2nd Quarter 2009

	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Conference/Convention Bookings								
<u>All Hotels</u>								
% Occupied Room Nights in County	25.7%	25.9%	27.1%	24.0%	31.5%	26.5%	27.4%	26.6%
Occupied Room Nights in County	203,031	74,124	71,529	57,378	276,256	192,286	214,588	229,687
Occupied Room Nights in County FYTD (Oct. - Sept.)	647,306	518,399	589,928	647,306	824,716	1,017,002	214,588	444,275
<u>Convention Hotels</u>								
% Occupied Room Nights	28.9%	27.2%	30.4%	29.6%	35.6%	30.3%	29.1%	26.6%
Occupied Room Nights	141,270	48,161	48,946	44,163	186,568	131,933	137,795	143,304
Occupied Room Nights FYTD (Oct. - Sept.)	422,369	329,260	378,206	422,369	535,156	667,089	137,795	261,099
Available Inventory*								
Rooms in County	44,972	14,984**	14,994**	14,994**	44,175	44,130	44,145	44,575
Room Nights	1,364,154	449,520	464,814	449,820	1,339,981	1,353,315	1,353,780	1,336,822
Room Nights FYTD (Oct. - Sept.)	4,054,756	3,140,122	3,604,936	4,054,756	4,020,391	5,373,706	1,353,780	2,690,602
Response Rate								
Month/Quarter (for all hotels in County)	49.9%	49.0%	52.8%	48.0%	61.6%	63.6%	61.2%	59.3%
FYTD (Oct. - Sept.)	56.8%	58.6%	57.9%	56.8%	61.6%	62.1%	61.2%	60.2%

* 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 17,051.



Property Manager Survey: 2nd Quarter 2009

Occupancy Rate	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Size of Hotel								
50 - 100 Rooms	48.8%	54.2%	49.7%	42.4%	52.7%	40.9%	51.1%	64.8%
101 + Rooms	59.8%	65.9%	58.2%	55.2%	67.8%	56.0%	59.1%	70.1%
101-219	58.0%	64.0%	56.6%	52.7%	63.5%	53.3%	57.6%	69.9%
220-500	67.0%	73.9%	63.4%	64.7%	72.7%	60.3%	62.0%	76.1%
All Properties	58.0%	63.8%	56.8%	53.2%	65.5%	53.6%	57.8%	69.2%
Geographic Region								
North	60.5%	67.7%	60.0%	55.4%	65.9%	53.9%	51.4%	66.9%
Central	59.7%	65.3%	57.2%	56.7%	66.4%	53.5%	61.2%	75.0%
South	55.4%	61.1%	54.9%	49.9%	64.3%	53.6%	57.4%	64.8%

What percent of your occupancy is international?	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Size of Hotel								
50-100 Rooms	16.8%	28.6%	2.7%	12.9%	7.0%	19.4%	5.1%	4.0%
101 + Rooms	5.2%	4.8%	5.1%	5.8%	4.4%	6.2%	5.4%	5.5%
101-219	5.4%	4.9%	6.2%	5.4%	5.2%	7.4%	5.0%	5.8%
220-500	4.1%	4.0%	2.8%	5.8%	4.8%	5.4%	5.7%	5.4%
All Properties	7.0%	8.4%	5.0%	7.1%	4.8%	8.0%	5.4%	5.5%
Geographic Region								
North	4.7%	3.1%	2.2%	9.0%	2.5%	4.6%	3.3%	4.0%
Central	7.0%	8.7%	6.8%	4.7%	4.9%	6.5%	6.4%	6.2%
South	7.9%	10.4%	3.7%	9.9%	5.9%	12.0%	4.7%	5.1%

* Caution: Extremely Low base



Property Manager Survey: 2nd Quarter 2009

Average Daily Room Rate	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Size of Hotel								
<u>50 - 100 Rooms*</u>	\$107.10^	\$131.64	\$96.69	\$86.44	\$140.17	\$112.09	\$142.22	\$188.13
<u>101 + Rooms</u>	\$136.19	\$169.45	\$126.10	\$108.51	\$157.39	\$123.30	\$152.88	\$189.30
101-219	\$104.20	\$122.80	\$98.17	\$85.64	\$114.20	\$92.83	\$107.49	\$137.27
220-500	\$133.79	\$171.27	\$117.90	\$113.01	\$164.54	\$143.28	\$156.92	\$183.66
<u>All Properties**</u>	\$131.70	\$163.83	\$121.45	\$105.17	\$154.58	\$121.39	\$150.60	\$188.55

* Please note that the response rate for hotels with 50-100 rooms was low in April (25.8%), May (23.4%) and June (25.3%).

** "All properties" includes those with fewer than 50 rooms.

^ In 2Q2009, fewer hotels replied which were more upscale with higher rates (i.e. Chesterfield, Colony and Brazilian Court Hotels in Palm Beach) when compared to other quarters. This may be a contributing factor to a lower ADR.



Property Manager Survey: 2nd Quarter 2009

Occupied Room Nights *	Occupied Room Nights	% Change
2Q		
2007	935,524	
2008	876,238	- 6.3
2009	789,895	- 9.9
April		
2007	336,329	
2008	306,854	- 8.8
2009	286,571	- 6.6
May		
2007	308,010	
2008	295,003	- 4.2
2009	264,179	- 10.4
June		
2007	291,185	
2008	274,381	- 5.8
2009	239,145	- 12.8
3Q		
2007	763,604	
2008	727,536	- 4.7
2009	N/A	
4Q		
2007	844,910	
2008	783,412	- 7.3
2009	N/A	
1Q		
2007	1,070,734	
2008	1,050,605	- 1.9
2009	923,953	- 12.1
FYTD (October – June)		
2007	2,864,560	
2008	2,771,753	- 3.2
2009	2,497,260	- 9.9

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



Property Manager Survey: 2nd Quarter 2009

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>
May 2009/June 2009 predictions from April			
Foresee Decrease	85.3%	80.4%	80.4%
Average decrease (among those who foresee decrease)	19.5%	20.8%	17.3%
Foresee No Change	12.4%	14.1%	16.0%
Foresee Increase	2.4%	5.5%	3.6%
Average increase (among those who foresee increase)	5.0%	5.0%	26.8%*
June 2009/July 2009 predictions from May			
Foresee Decrease	81.8%	84.5%	74.5%
Average decrease (among those who foresee decrease)	17.3%	20.1%	15.1%
Foresee No Change	18.2%	15.5%	17.9%
Foresee Increase	0.0%	0.0%	7.6%
Average increase (among those who foresee increase)	N/A**	N/A**	29.5%*
July 2009/August 2009 predictions from June			
Foresee Decrease	85.6%	79.5%	80.7%
Average decrease (among those who foresee decrease)	25.6%	28.3%	24.1%
Foresee No Change	14.4%	18.1%	9.4%
Foresee Increase	0.0%	2.4%	9.9%
Average increase (among those who foresee increase)	N/A**	10.0%	14.5%
Second Quarter predictions from April, May, and June			
Foresee Decrease	84.6%	81.8%	78.9%
Average decrease (among those who foresee decrease)	20.5%	22.9%	18.6%
Foresee No Change	14.6%	15.4%	14.4%
Foresee Increase	0.8%	2.8%	6.7%
Average increase (among those who foresee increase)	5.0%	6.4%	22.1%

*Caution: Extremely low base

** Indicates no property managers expected an increase in room revenue.



Property Manager Survey: 2nd Quarter 2009

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>
July 2009/August 2009 predictions from April			
Foresee Decrease	82.1%	74.9%	79.7%
Average decrease (among those who foresee decrease)	19.5%	23.7%	16.6%
Foresee No Change	15.5%	22.8%	16.7%
Foresee Increase	2.4%	2.3%	3.6%
Average increase (among those who foresee increase)	5.0%	5.0%	18.6%*
August 2009/September 2009 predictions from May			
Foresee Decrease	80.2%	77.9%	74.5%
Average decrease (among those who foresee decrease)	16.2%	19.5%	15.3%
Foresee No Change	18.2%	22.1%	17.9%
Foresee Increase	1.5%	0.0%	7.6%
Average increase (among those who foresee increase)	29.0%*	N/A**	37.7%*
September 2009/October 2009 predictions from June			
Foresee Decrease	90.1%	83.8%	82.2%
Average decrease (among those who foresee decrease)	24.9%	27.9%	22.3%
Foresee No Change	9.9%	13.8%	9.4%
Foresee Increase	0.0%	2.4%	8.3%
Average increase (among those who foresee increase)	N/A**	10.0%	11.4%
Second Quarter predictions from April, May, June			
Foresee Decrease	84.1%	79.0%	79.0%
Average decrease (among those who foresee decrease)	20.1%	23.8%	18.0%
Foresee No Change	14.6%	19.5%	14.8%
Foresee Increase	1.3%	1.6%	6.2%
Average increase (among those who foresee increase)	14.2%	7.5%	22.6%

* Caution: Extremely low base

** Indicates no property managers expected an increase in room revenue.



Property Manager Survey: 2nd Quarter 2009

Bookings via third party website	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Size of Hotel								
<u>50 - 100 Rooms</u>	18.9%	32.8%	12.0%	7.3%	16.8%	29.0%	19.1%	11.9%
<u>101 + Rooms</u>	15.9%	15.5%	18.6%	12.1%	11.3%	13.6%	13.7%	14.5%
101-219	16.2%	16.9%	17.8%	12.0%	12.1%	14.0%	13.7%	14.6%
220-500	17.1%	9.9%	30.5%**	14.5%	8.1%	13.6%	16.2%	17.2%
<u>All Properties*</u>	18.4%	22.2%	19.1%	10.5%	13.4%	18.4%	15.9%	15.1%

* "All properties" includes those with fewer than 50 rooms.

**Caution: Low base



Property Manager Survey: 2nd Quarter 2009

	<u>Total 2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2008</u>	<u>Total 3Q 2008</u>	<u>Total 4Q 2008</u>	<u>Total 1Q 2009</u>
MARKET FOCUS (in terms of marketing, advertising and promotion)								
Florida Leisure Drive Market	73.9%	75.0%	71.9%	71.9%	88.9%	70.0%	78.8%	77.0%
Florida Business Drive Market	63.1%	65.5%	63.6%	54.8%	71.3%	56.2%	63.2%	62.6%
Florida Association Market	51.6%	50.7%	45.5%	64.5%	57.6%	63.3%	52.9%	54.3%
Weddings	61.2%	61.5%	57.6%	64.5%	64.0%	57.4%	60.8%	63.2%
Amateur Sports Events	66.0%	59.6%	60.6%	74.2%	58.4%	59.9%	54.8%	68.2%
Convention - Northeast	23.1%	18.5%	36.4%	21.9%	17.9%	26.9%	27.8%	32.3%
Convention - Mid-Atlantic	18.8%	21.7%	15.6%	21.9%	10.0%	21.4%	25.9%	30.1%
Convention - South	21.2%	21.7%	24.2%	21.9%	19.9%	28.0%	29.4%	34.3%
Convention - Midwest	13.8%	13.6%	15.6%	12.9%	14.0%	20.8%	18.8%	22.0%
Other**	19.2%	17.3%	21.9%	19.4%	12.3%	20.3%	18.9%	13.7%

** OTA's - Corporate travel, Kosher market/events (three mentions each), Small meetings, Local travel (two mentions each), Social catering, Sports groups, Arts market, All markets (one mention each)



Property Manager Survey: 2nd Quarter 2009

Greatest challenges for 2009*	Total
<u>Economy/Rates Net</u>	35
Economy (non-specific)	16
Rates/Maintaining ADR	13
New hotels opening – price war/Competitor offers	4
Cash flow	1
ROI	1
People are staying home more due to the economy	1
Maintaining pace and occupancy w/ 2008 even if ADR is lower	1
The economic recovery by the 4 th quarter	1

* Multiple responses accepted.



Property Manager Survey: 2nd Quarter 2009

Greatest challenges for 2009 (continued)*	Total
Miscellaneous Net	23
Heads in beds/Occupancy	8
Turn down in Corporate segment/Corporate group cancellations	8
The short term booking window for leisure and group segments	3
Last minute booking for both transient and group business	1
Spreading the word about our hotel	1
Group market	1
Major meetings	1
Transient demand decrease for the next 3 months	1
Weather	1
Building group base back up for season	1

* Multiple responses accepted.



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's 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?." (removed from survey)



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.



Methodology

Survey Changes (continued)

In July 2008, the visitors' survey was once again revised and updated to better address the Tourist Development Council's needs in terms of tourist information.

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

-The question "What would make your next trip better?" was replaced with "What one activity did you do on a recent trip that you wish you could do in Palm Beach County?"

-The following questions were added for vacation/leisure guests only:

-"Where did you go on your last vacation?"

-"What other destinations, in Florida or elsewhere, did you consider when planning this leisure visit to Palm Beach County?"

-"How does this visit to Palm Beach County compare to your last vacation in terms of..."

- "Being a great place to go again and again"
- "Being able to always find a new place or see a new thing to do"
- "Being appreciated as a tourist or visitor"
- "Being a good value"
- "Being great for historical sights and places"
- "Being great for discovering nature-based activities/ecotourism"
- "Being great for museums and other cultural activities"



Hotel Survey: 2nd Quarter 2009

Characteristics of Stay	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Average Party Size *	2.0	1.9	2.0	2.1	2.0	2.1	1.9	1.9
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.7	3.9	3.6	5.0	3.4	3.7	3.8	4.8
Nights in Hotel	3.6	3.6	3.5	4.9	3.3	3.5	3.7	3.9
Rooms per Night *	1.2	1.2	1.2	1.2	1.3	1.3	1.2	1.2

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



Hotel Survey: 2nd Quarter 2009

Visitor Expenditures+	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Average Expenditure Per Visit								
Lodging	\$652	\$745	\$615	\$774	\$700	\$602	\$725	\$1,034
Restaurant/Bar	\$407	\$450	\$433	\$451	\$350	\$336	\$352	\$402
Gifts/Shopping	\$115	\$94	\$51	\$289	\$99	\$161	\$152	\$82
Entertainment/Recreation	\$22	\$22	\$21	\$15	\$23	\$39	\$44	\$74
Local Travel	\$133	\$148	\$117	\$162	\$116	\$144	\$133	\$172
Total Per Party*	\$1,328	\$1,458	\$1,237	\$1,691	\$1,287	\$1,281	\$1,406	\$1,763
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$664	\$767	\$635	\$809	\$644	\$610	\$740	\$928
Total Per Person/Per Day	\$185	\$213	\$183	\$165	\$195	\$174	\$200	\$238
Lodging	\$91	\$109	\$91	\$75	\$106	\$82	\$103	\$139
Restaurant/Bar	\$57	\$66	\$64	\$44	\$53	\$46	\$50	\$54
Gifts/Shopping	\$16	\$14	\$8	\$28	\$15	\$22	\$22	\$11
Entertainment/Recreation	\$3	\$3	\$3	\$1	\$4	\$5	\$6	\$10
Local Travel	\$19	\$22	\$17	\$16	\$18	\$20	\$19	\$23

* 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: 2nd Quarter 2009

Visitor Expenditures+	<u>Pleasure</u>							
	<u>Total 2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2008</u>	<u>Total 3Q 2008</u>	<u>Total 4Q 2008</u>	<u>Total 1Q 2009</u>
Average Expenditure Per Visit								
Lodging	\$754	\$871	\$667	\$1,228	\$781	\$655	\$708	\$1,254
Restaurant/Bar	\$422	\$443	\$443	\$651	\$418	\$402	\$396	\$505
Gifts/Shopping	\$226	\$193	\$77	\$762	\$162	\$316	\$280	\$172
Entertainment/Recreation	\$29	\$25	\$19	\$52	\$40	\$62	\$96	\$172
Local Travel	\$172	\$180	\$165	\$274	\$140	\$156	\$164	\$172
Total Per Party*	\$1,603	\$1,711	\$1,371	\$2,967	\$1,541	\$1,591	\$1,644	\$2,274
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$641	\$713	\$588	\$1,187	\$593	\$612	\$685	\$989
Total Per Person/Per Day	\$156	\$174	\$154	\$160	\$165	\$157	\$171	\$202
Lodging	\$74	\$89	\$75	\$66	\$83	\$65	\$74	\$111
Restaurant/Bar	\$41	\$45	\$50	\$35	\$45	\$40	\$41	\$45
Gifts/Shopping	\$22	\$20	\$9	\$41	\$17	\$31	\$29	\$15
Entertainment/Recreation	\$3	\$3	\$2	\$3	\$4	\$6	\$10	\$15
Local Travel	\$17	\$18	\$19	\$15	\$15	\$15	\$17	\$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: 2nd Quarter 2009

Visitor Expenditures+	<u>Business</u>							
	<u>Total 2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2008</u>	<u>Total 3Q 2008</u>	<u>Total 4Q 2008</u>	<u>Total 1Q 2009</u>
Average Expenditure Per Visit								
Lodging	\$573	\$646	\$577	\$444	\$630	\$584	\$728	\$849
Restaurant/Bar	\$387	\$451	\$429	\$273	\$300	\$300	\$329	\$316
Gifts/Shopping	\$38	\$19	\$34	\$64	\$60	\$59	\$84	\$31
Entertainment/Recreation	\$16	\$22	\$24	\$3	\$12	\$26	\$18	\$16
Local Travel	\$102	\$118	\$84	\$84	\$96	\$139	\$116	\$161
Total Per Party*	\$1,117	\$1,257	\$1,148	\$867	\$1,098	\$1,109	\$1,274	\$1,373
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$698	\$838	\$700	\$482	\$686	\$652	\$849	\$916
Total Per Person/Per Day	\$218	\$262	\$218	\$166	\$229	\$198	\$243	\$295
Lodging	\$112	\$135	\$110	\$85	\$131	\$104	\$139	\$183
Restaurant/Bar	\$76	\$94	\$82	\$52	\$63	\$54	\$63	\$68
Gifts/Shopping	\$8	\$4	\$6	\$12	\$13	\$11	\$16	\$7
Entertainment/Recreation	\$3	\$5	\$4	\$1	\$3	\$5	\$3	\$3
Local Travel	\$20	\$25	\$16	\$16	\$20	\$25	\$22	\$35

* 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: 2nd Quarter 2009

Planning the Trip to Palm Beach County	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Reason for Trip								
Conference/Convention/ Business Meeting	54.1%	52.5%	53.8%	52.9%	57.9%	55.9%	60.2%	52.7%
- Business Meeting	42.2%	48.8%	35.5%	39.7%	49.7%	47.6%	50.8%	47.4%
- Conference/Convention	11.9%	3.7%	18.3%	13.2%	7.9%	8.4%	9.2%	5.1%
- Other Business	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.1%	0.3%
Vacation/Pleasure	38.2%	41.8%	39.1%	34.0%	36.5%	35.9%	33.6%	38.7%
Sporting Event	1.8%	2.4%	1.0%	2.0%	1.2%	1.7%	3.1%	4.3%
Cultural Event/Attraction	0.3%	0.0%	0.6%	0.4%	0.2%	0.3%	0.4%	1.4%
Film/TV location scouting/production	0.2%	0.0%	0.0%	0.6%	0.1%	0.1%	0.0%	0.2%
Other	4.5%	2.8%	4.1%	9.4%	4.1%	6.1%	2.7%	2.7%
Who Made the Decision*								
Employer	52.2%	49.1%	52.7%	56.4%	54.2%	52.1%	57.2%	50.4%
Head of Household/ Other adult	39.9%	43.1%	40.0%	35.7%	35.6%	40.5%	38.1%	44.8%
Family Living in PBC	10.3%	12.2%	10.8%	7.7%	10.6%	6.7%	5.9%	5.4%
Children Influenced Decision	0.8%	0.4%	0.0%	2.0%	1.1%	1.4%	0.4%	1.1%
Advanced Planning								
One Month or Less	58.8%	60.1%	59.5%	61.1%	52.3%	67.2%	56.3%	54.3%
2 to 3 Months	20.3%	17.2%	25.5%	16.8%	24.8%	15.2%	21.0%	20.7%
More than 3 Months	20.9%	22.6%	14.9%	22.1%	22.9%	17.6%	22.7%	25.1%

* Multiple responses accepted.



Hotel Survey: 2nd Quarter 2009

Planning the Trip to Palm Beach County (Continued)	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip	52.2%	50.7%	53.0%	51.3%	56.5%	55.1%	58.7%	50.6%
Visit Friends/Relatives	20.3%	23.8%	16.3%	19.6%	22.5%	18.8%	20.3%	26.1%
Previous Visit	19.3%	18.3%	20.2%	24.3%	11.7%	14.0%	10.6%	19.1%
Weather	10.4%	13.2%	9.2%	14.0%	7.2%	4.6%	4.8%	8.6%
Beaches	9.7%	12.7%	8.1%	9.2%	6.8%	6.5%	4.3%	5.7%
Convenient Flights	6.5%	6.6%	5.5%	6.2%	3.4%	4.5%	4.5%	5.0%
Special Event	5.8%	3.4%	5.3%	7.3%	11.6%	5.1%	6.8%	5.7%
Friends/Relatives recommendation	3.0%	2.5%	2.5%	3.9%	2.4%	3.0%	2.0%	2.8%
Hotel Brochure/Website	1.8%	3.5%	0.5%	2.1%	0.9%	1.6%	1.3%	1.9%
Golf/Tennis/Recreation	1.7%	1.6%	0.4%	3.2%	1.8%	1.7%	2.8%	3.1%
Attend Sporting Event	1.4%	2.7%	0.4%	0.8%	0.0%	0.3%	1.2%	3.3%
Other Internet Sources	0.8%	0.5%	1.5%	0.5%	0.3%	0.6%	0.2%	0.3%
Attraction Brochure/Website	0.6%	0.5%	1.1%	0.0%	0.1%	0.6%	0.3%	1.1%
Compete in Sporting Event	0.6%	0.4%	1.3%	0.5%	1.4%	1.0%	1.5%	0.8%
PBC-CVB Information/Website	0.6%	0.5%	0.6%	0.7%	0.5%	0.4%	0.5%	0.1%
Art/Cultural Event	0.3%	0.0%	0.0%	1.1%	0.3%	0.4%	0.2%	0.7%
Spring Training	0.1%	0.4%	0.0%	0.7%	0.0%	0.0%	0.0%	1.0%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Travel Agency	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.3%
Media Coverage	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%
Bus Tour	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	0.1%
State Tourist Agency	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Other	2.7%	0.8%	6.4%	51.3%	4.1%	6.0%	4.4%	3.1%

* Multiple responses accepted.



Hotel Survey: 2nd Quarter 2009

Booking Tools	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Booked Trip with Travel Agency								
Yes	24.4%	26.5%	24.5%	18.8%	21.8%	23.4%	25.7%	23.2%
No	75.6%	73.5%	75.5%	81.2%	78.2%	76.6%	74.3%	76.8%
Booked Any Part of Trip Using Internet								
Yes	54.9%	62.6%	54.6%	44.2%	44.6%	47.4%	46.0%	48.9%
No	45.1%	37.4%	45.4%	55.8%	55.4%	52.6%	54.0%	51.1%
Booked Any Part of Trip Using Internet* (among those who used the Internet)								
Hotel	81.3%	81.6%	78.1%	87.5%	75.1%	82.7%	81.0%	76.7%
Hotel website	36.2%	28.5%	44.5%	38.1%	38.2%	38.0%	41.2%	30.1%
Expedia	5.6%	7.9%	4.2%	4.7%	2.9%	7.7%	5.3%	7.7%
Hotwire	3.9%	7.2%	3.1%	1.6%	1.9%	3.9%	3.4%	2.1%
Travelocity	3.6%	5.7%	0.8%	4.1%	2.9%	6.4%	4.1%	4.8%
Orbitz	2.3%	2.8%	1.9%	2.3%	3.3%	1.7%	3.0%	1.7%
Hotels.com	1.7%	0.0%	0.8%	5.7%	2.7%	2.7%	3.1%	1.6%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Other Website	12.2%	13.6%	5.7%	17.3%	3.6%	7.5%	6.6%	7.0%
Don't Remember	18.8%	20.3%	17.9%	19.6%	20.6%	17.7%	18.2%	22.7%
Air	60.4%	64.7%	54.8%	62.2%	68.4%	61.3%	66.0%	68.8%
Car Rental	29.7%	35.3%	18.4%	37.1%	40.4%	37.7%	31.3%	36.6%
Tickets to Event	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.3%	0.6%
Other	6.5%	4.0%	9.9%	5.1%	3.8%	3.9%	4.3%	6.2%
Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)								
Yes	4.6%	2.8%	2.7%	7.0%	5.5%	6.2%	5.1%	5.2%
No	95.4%	97.2%	97.3%	93.0%	94.5%	93.8%	94.9%	94.8%

* Multiple responses accepted.



Hotel Survey: 2nd Quarter 2009

Activity Participation	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Participation in Specific Activities*								
Restaurants	97.9%	98.4%	99.3%	96.8%	93.5%	94.7%	95.6%	95.6%
Shopping	30.9%	32.2%	32.8%	29.4%	28.8%	32.2%	32.5%	31.1%
Went to Beach	30.2%	35.3%	29.6%	23.8%	31.6%	30.2%	26.3%	27.4%
Swimming	23.8%	24.4%	22.3%	23.9%	20.2%	22.6%	14.0%	12.6%
Bars/Nightclubs	10.6%	7.9%	12.0%	9.7%	8.7%	8.6%	8.6%	9.2%
Visited Downtown Delray Beach Attractions	9.3%	10.5%	8.6%	6.1%	5.6%	5.2%	8.0%	6.8%
Golf, Tennis	8.5%	11.1%	6.1%	8.1%	6.1%	7.3%	10.4%	12.4%
Visited Mizner Park/Boca Raton	8.5%	6.4%	8.4%	8.8%	5.5%	4.3%	5.9%	6.7%
Visited downtown West Palm Beach Attractions/City Place	6.7%	6.7%	0.4%	5.3%	8.6%	9.0%	10.5%	9.0%
Museums, Art Galleries	3.5%	3.7%	2.5%	8.6%	2.7%	2.3%	5.0%	3.9%
Visited Palm Beach/Worth Avenue	2.7%	4.1%	0.6%	2.2%	1.3%	1.0%	3.1%	3.0%
Attractions, Tours, Zoo	2.5%	2.6%	2.1%	1.9%	2.0%	2.3%	1.9%	2.8%
Visited Downtown at the Gardens	2.3%	1.3%	2.9%	2.1%	2.3%	1.5%	2.1%	2.4%
Visited Wildlife Refuge	2.3%	1.3%	2.8%	2.2%	1.9%	2.4%	3.3%	3.2%
Boating	2.0%	0.8%	1.5%	4.3%	3.3%	2.5%	1.3%	1.5%
Visited downtown Lake Worth	1.9%	4.5%	7.0%	0.0%	0.9%	1.3%	0.7%	1.5%
Attended a Sporting Event	1.7%	3.2%	1.1%	0.7%	0.4%	1.9%	2.3%	3.3%
Fishing	1.3%	1.2%	1.1%	6.2%	1.6%	1.1%	1.7%	1.7%
Performing Arts (plays, concerts, dance)	1.2%	1.7%	0.4%	1.8%	0.8%	1.3%	1.6%	2.8%
Snorkeling	0.8%	0.4%	1.0%	1.0%	1.0%	1.7%	0.7%	0.2%
Competed in Sports Event	0.6%	0.4%	1.0%	0.5%	0.0%	0.3%	0.5%	0.4%
Gambling Cruise	0.5%	0.5%	0.7%	0.3%	1.1%	0.7%	0.7%	0.2%
Visited Riviera Beach/Singer Island	0.5%	0.0%	0.7%	0.9%	0.7%	1.0%	1.4%	0.7%
Pari-mutuels (dog-track)	0.4%	1.2%	0.0%	0.0%	0.0%	0.0%	0.6%	0.4%
Kite Surfing	0.2%	0.0%	0.4%	0.3%	0.3%	0.0%	0.0%	0.1%
Diving	0.1%	0.0%	0.4%	0.0%	0.1%	0.7%	0.2%	0.1%
Horse Related Activities	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%	0.6%	1.2%
Surfing	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%	0.7%	0.4%
Palm Beach County Convention Center	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.1%
Other	5.7%	7.1%	5.5%	5.1%	8.7%	10.4%	8.9%	7.2%

*Multiple responses accepted.



Hotel Survey: 2nd Quarter 2009

Return Visits	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Plan to Return to PBC								
Yes	89.4%	91.0%	88.2%	91.6%	82.3%	85.4%	82.1%	84.4%
No	2.8%	2.4%	2.5%	2.8%	3.3%	3.1%	3.2%	2.6%
Don't know	7.9%	6.6%	9.4%	5.6%	14.4%	11.5%	14.7%	13.0%
If no, why not?* (Top mentions – 4% or higher)								
	n = 19	n = 5**	n = 5**	n = 7**	n = 24	n = 23	n = 24	n = 19
Poor service	10.5%	0	0	2	0.0%	0.0%	0.0%	0.0%
Going to other places/I like changing destinations	10.0%	0	0	2	4.0%	0.0%	4.1%	9.7%
No business in the area/Relocation of meeting	9.3%	0	1	1	12.9%	17.6%	28.6%	10.5%
Project is ending	8.3%	0	0	0	0.0%	0.0%	0.0%	0.0%
Unfriendly people	4.8%	1	0	0	0.0%	0.0%	0.0%	0.0%
Because I only wanted to see it once	4.6%	0	1	0	0.0%	0.0%	0.0%	0.0%
Came only for a wedding	4.3%	0	1	0	0.0%	0.0%	0.0%	0.0%
Too far	13.1%	2	0	0	0.0%	0.0%	0.0%	5.1%
No reason/No answer	26.8%	2	2	1	67.5%	47.6%	37.2%	37.2%
When do you plan on returning to PBC?								
Within the next 3 months	33.6%	32.8%	32.0%	41.6%	34.9%	35.1%	34.3%	34.0%
Within the next 6 months	12.7%	11.6%	14.6%	11.7%	9.7%	13.9%	13.0%	8.3%
Within the next year	19.5%	21.7%	21.3%	14.0%	25.0%	21.0%	20.3%	26.9%
Within the next few years	6.4%	9.6%	4.7%	4.1%	4.8%	3.6%	5.0%	5.6%
Don't Know	27.8%	24.4%	27.4%	28.5%	25.7%	26.4%	27.4%	25.2%

*Multiple responses accepted.

** Raw numbers shown due to low base size



Hotel Survey: 2nd Quarter 2009

Travel Details	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
<u>Main Destination</u>								
Palm Beach County	95.2%	94.0%	96.7%	97.1%	91.3%	90.9%	90.2%	90.2%
<u>First Trip to PBC</u>	27.6%	22.9%	32.1%	25.8%	29.0%	24.8%	29.9%	22.2%
<u>Type of Transportation*</u>								
Airplane	70.1%	77.8%	67.0%	61.2%	74.4%	69.1%	77.2%	74.9%
Car	33.3%	26.0%	34.2%	42.7%	30.5%	35.6%	28.6%	31.0%
Other	0.6%	0.4%	1.8%	0.0%	0.8%	0.5%	0.2%	0.3%

*Multiple responses accepted.



Hotel Survey: 2nd Quarter 2009

Attitudes about Trip to Palm Beach County	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Things Liked Best – Top Mentions								
Climate/Weather	32.4%	41.6%	29.9%	22.4%	34.7%	26.6%	42.4%	46.4%
Beaches/Ocean	15.4%	15.1%	18.0%	11.8%	15.0%	17.0%	9.8%	8.2%
Beautiful/Nice Area	10.0%	6.0%	14.1%	8.7%	9.4%	9.3%	7.0%	7.7%
Cleanliness	4.8%	4.2%	3.9%	6.0%	2.7%	4.1%	4.2%	3.4%
Visiting Family/Friends	4.1%	6.1%	2.5%	3.8%	4.4%	3.3%	5.1%	4.8%
Relaxing Atmosphere	3.8%	4.3%	4.2%	2.6%	3.3%	4.7%	4.5%	4.4%
Restaurant/Food	3.0%	2.8%	2.6%	3.3%	3.1%	2.6%	2.9%	2.0%
Everything	3.0%	1.3%	0.7%	11.8%	2.9%	2.4%	1.2%	1.1%
Nice People	2.8%	1.8%	2.3%	3.2%	4.1%	6.6%	4.0%	3.5%
Hotel	1.7%	0.9%	3.1%	0.9%	2.4%	3.5%	1.7%	1.7%
Shopping	1.6%	0.9%	1.3%	3.0%	1.5%	1.2%	2.8%	1.9%
Location	1.4%	1.4%	0.8%	7.0%	2.6%	2.3%	1.5%	2.2%
Golf	1.3%	0.9%	1.5%	1.6%	1.5%	1.7%	2.6%	1.4%
Palm Trees	1.1%	1.4%	0.9%	1.3%	2.5%	1.8%	1.6%	0.3%
Other	13.7%	11.4%	9.1%	10.5%	10.9%	13.2%	9.5%	11.8%



Hotel Survey: 1st Quarter 2009

Attitudes about Trip to Palm Beach County	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Things Liked Least – Top Mentions								
Traffic/Bad Drivers	22.4%	30.5%	23.6%	18.2%	26.4%	23.1%	31.6%	31.7%
Humidity/Poor Weather	21.7%	13.5%	22.0%	23.3%	21.7%	30.1%	16.8%	11.7%
Expensive	4.5%	4.2%	2.0%	7.7%	5.5%	4.4%	4.2%	5.8%
Too crowded	2.0%	2.5%	3.6%	0.0%	2.5%	2.4%	0.6%	4.8%
Unfriendly people	2.0%	1.7%	3.1%	1.4%	3.3%	3.3%	2.5%	1.5%
Road Construction	1.7%	0.8%	2.4%	2.3%	2.7%	1.1%	0.9%	0.3%
Stay Was Too Short	1.5%	1.7%	1.3%	1.5%	1.4%	1.9%	2.2%	1.5%
Bad neighborhoods / Urban blight	1.5%	1.6%	1.4%	1.5%	2.3%	0.8%	0.9%	0.9%
Hotel (general)	1.4%	2.4%	0.6%	1.0%	1.2%	1.1%	2.6%	4.2%
Work	0.8%	1.7%	0.0%	0.6%	2.5%	1.1%	1.3%	0.9%
Other	23.1%	35.8%	15.0%	15.7%	25.0%	19.7%	24.6%	23.8%
Nothing liked least	17.1%	8.3%	22.4%	19.8%	5.4%	11.4%	11.6%	12.4%



Hotel Survey: 2nd Quarter 2009

What one activity did you do on a recent trip that you wish you could do in Palm Beach County? (Top mentions – 2% or higher in total)	<u>Total 2Q2009</u>	<u>Apr. 2009</u>	<u>May 2009</u>	<u>June 2009</u>
<u>Activities Available Currently in PBC</u>				
Golfing	16.6%	9.2%	15.6%	25.9%
Going to the beach	12.8%	11.1%	14.1%	10.9%
Fishing/Deep sea fishing	7.9%	7.3%	8.8%	7.5%
Relaxing	3.8%	7.2%	3.9%	0.0%
Swimming	3.3%	2.1%	6.1%	1.2%
Walk/Run	3.2%	2.1%	3.4%	3.6%
Boating	2.6%	2.1%	1.4%	4.8%
Snorkeling	2.6%	2.1%	5.2%	0.0%
Gambling	2.2%	4.6%	1.3%	3.7%
Sightseeing/Visiting historical sights	2.1%	0.0%	0.0%	5.4%
Jet Ski	2.0%	2.4%	2.2%	2.0%
Other	25.5%	33.1%	21.1%	28.8%
<u>Activities Not Available Currently in PBC*</u>				
Other (include skiing, swimming with dolphins, etc.)	5.3%	9.4%	7.4%	0.0%
<u>Nothing</u>	10.7%	9.5%	11.8%	6.4%

*No single activity that is not currently available in PBC received two percent or higher in total



Hotel Visitor Survey: 2nd Quarter 2009

Last Vacation Destination+	Total 2Q2009	Apr. 2009	May 2009	June 2009
<u>Domestic</u>	61.8%	71.4%	68.2%	47.5%
Florida	25.2%	28.8%	22.9%	22.3%
Far West	16.2%	22.8%	17.6%	8.5%
Southeast (Excluding Florida)	7.7%	4.4%	12.4%	8.1%
New York	4.3%	4.6%	3.6%	3.7%
Midwest	3.1%	4.4%	4.1%	1.9%
Mid Atlantic	2.9%	1.6%	4.9%	2.9%
New England	2.5%	4.8%	2.6%	0.0%
<u>International</u>	35.9%	28.6%	31.8%	51.4%
Latin America/Caribbean	16.3%	14.9%	15.3%	12.8%
Europe	11.0%	6.1%	10.4%	20.3%
England/UK	0.0%	0.0%	0.0%	0.0%
Germany	0.0%	0.0%	0.0%	0.0%
Africa	3.0%	1.5%	2.3%	6.8%
Australia/Asia	3.0%	1.5%	0.0%	6.0%
Canada	2.9%	4.6%	2.6%	1.5%
Middle East	1.6%	0.0%	1.3%	4.0%
No Answer	0.4%	0.0%	0.0%	1.1%

+ Among vacation/leisure visitors only



Hotel Visitor Survey: 2nd Quarter 2009

Other Vacation Destinations Considered*+	Total 2Q2009	Apr. 2009	May 2009	June 2009
<u>Domestic</u>	69.7%	66.1%	63.9%	67.2%
Florida	67.8%	63.6%	63.9%	64.1%
Southeast (Excluding Florida)	3.4%	8.3%	0.0%	0.0%
Far West	1.7%	4.9%	0.0%	0.0%
New York	1.1%	0.0%	0.0%	3.2%
Mid Atlantic	0.0%	0.0%	0.0%	0.0%
Midwest	0.0%	0.0%	0.0%	0.0%
New England	0.0%	0.0%	0.0%	0.0%
<u>International</u>	3.9%	4.9%	0.0%	6.4%
Latin America/Caribbean	2.8%	4.9%	0.0%	3.2%
Europe	0.0%	0.0%	0.0%	0.0%
Germany	0.0%	0.0%	0.0%	0.0%
England/UK	0.0%	0.0%	0.0%	0.0%
Canada	1.1%	0.0%	0.0%	3.2%
Australia/Asia	0.0%	0.0%	0.0%	0.0%
Africa	0.0%	0.0%	0.0%	0.0%
Middle East	0.0%	0.0%	0.0%	0.0%
<u>No other destinations</u>	25.3%	18.6%	36.1%	28.2%

* Multiple responses accepted

+ Among vacation/leisure visitors only



Hotel Visitor Survey: 2nd Quarter 2009

Comparison of Palm Beach County to Last Vacation+	Total <u>2Q2009</u>	Apr. <u>2009</u>	May <u>2009</u>	June <u>2009</u>
<u>Being a great place to go again and again</u>				
Palm Beach County is much better	34.3%	28.0%	46.1%	30.2%
Palm Beach County is about the same	60.4%	66.1%	53.9%	60.3%
Palm Beach County is much worse	5.3%	6.0%	0.0%	9.4%
<u>Being able to always find a new place to see or a new thing to do</u>				
Palm Beach County is much better	27.8%	25.2%	39.1%	16.4%
Palm Beach County is about the same	65.9%	71.6%	55.1%	73.4%
Palm Beach County is much worse	6.2%	3.2%	5.9%	10.2%
<u>Being appreciated as a tourist or visitor</u>				
Palm Beach County is much better	29.2%	19.6%	44.3%	28.0%
Palm Beach County is about the same	63.2%	75.9%	51.4%	53.5%
Palm Beach County is much worse	7.6%	4.5%	4.3%	18.5%
<u>Being a good value</u>				
Palm Beach County is much better	24.4%	21.1%	27.5%	28.3%
Palm Beach County is about the same	65.8%	70.9%	60.4%	62.3%
Palm Beach County is much worse	9.8%	8.0%	12.2%	9.3%
<u>Being great for historical sights and places</u>				
Palm Beach County is much better	12.4%	9.3%	14.4%	13.7%
Palm Beach County is about the same	62.6%	64.5%	71.1%	53.5%
Palm Beach County is much worse	25.0%	26.1%	14.5%	32.7%
<u>Being great for discovering nature-based activities/ecotourism</u>				
Palm Beach County is much better	30.3%	31.0%	34.0%	26.3%
Palm Beach County is about the same	61.2%	56.8%	60.6%	68.2%
Palm Beach County is much worse	8.6%	12.2%	5.4%	5.4%
<u>Being great for museums and other cultural activities</u>				
Palm Beach County is much better	24.9%	20.7%	29.9%	28.4%
Palm Beach County is about the same	59.8%	65.7%	63.1%	47.0%
Palm Beach County is much worse	15.3%	13.6%	7.0%	24.6%

+ Among vacation/leisure visitors only



Hotel Survey: 2nd Quarter 2009

Characteristics of Visitors	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
Age								
Under 35	17.6%	16.8%	18.8%	18.8%	17.5%	19.0%	16.4%	13.0%
35 to 54	51.1%	52.3%	46.6%	48.1%	56.8%	53.0%	54.5%	48.4%
55 to 64	21.4%	24.0%	24.9%	19.6%	19.0%	19.7%	20.2%	25.0%
65 +	9.9%	6.8%	9.8%	13.5%	6.8%	8.3%	9.0%	13.6%
Occupation								
Professional/Managerial	59.0%	58.6%	55.9%	62.4%	61.6%	58.5%	64.3%	60.6%
Sales	14.7%	13.9%	17.5%	16.4%	15.4%	16.3%	14.3%	16.8%
Retired	12.1%	11.1%	14.7%	11.6%	9.3%	9.3%	10.3%	13.7%
Technical	7.3%	9.3%	4.7%	4.7%	6.4%	6.6%	6.4%	4.9%
Student	1.1%	0.4%	1.6%	1.0%	0.9%	1.2%	0.4%	1.1%
Other	6.1%	6.6%	6.8%	4.0%	6.4%	8.0%	4.2%	2.9%
Hispanic Origin	6.4%	3.8%	7.7%	12.5%	6.1%	7.1%	4.1%	4.0%
Ethnicity								
White/Caucasian	90.4%	91.6%	88.3%	92.7%	91.2%	89.0%	93.4%	93.9%
African-American/Black	6.3%	4.7%	8.9%	6.7%	5.9%	8.4%	3.6%	4.2%
Asian	2.5%	2.7%	2.0%	0.3%	2.7%	2.1%	2.7%	1.7%
Other	0.7%	91.6%	0.8%	0.3%	0.3%	0.4%	0.3%	0.1%



Hotel Survey: 2nd Quarter 2009

Characteristics of Visitors (Continued)	Total <u>2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	Total <u>2Q 2008</u>	Total <u>3Q 2008</u>	Total <u>4Q 2008</u>	Total <u>1Q 2009</u>
<u>Income</u>								
Under \$45,000	4.8%	4.2%	5.1%	10.2%	4.0%	2.8%	2.2%	3.0%
\$45,000 to \$64,999	10.0%	7.2%	13.3%	8.0%	8.2%	7.8%	8.9%	6.1%
\$65,000 to \$99,999	22.0%	20.4%	25.6%	18.9%	22.2%	24.1%	20.6%	17.5%
\$100,000 to \$200,000	42.2%	43.6%	35.3%	44.1%	42.6%	45.4%	44.6%	44.6%
Over \$200,000	21.0%	24.8%	20.7%	18.8%	23.0%	20.0%	23.6%	28.9%
<u>Gender</u>								
Male	57.6%	55.8%	55.1%	57.2%	59.6%	61.2%	61.0%	57.8%
Female	42.4%	44.2%	44.9%	42.8%	40.4%	38.8%	39.0%	42.2%



Hotel Survey: 2nd Quarter 2009

<u>Description of Travel Party*</u>	Total Hotel Guests							
	<u>Total 2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2008</u>	<u>Total 3Q 2008</u>	<u>Total 4Q 2008</u>	<u>Total 1Q 2009</u>
Adult family members or friends	44.7%	40.9%	42.2%	50.0%	38.1%	40.7%	36.2%	42.0%
Self Only	39.0%	40.4%	42.0%	37.6%	39.9%	38.7%	45.1%	40.0%
Business Associates	16.6%	18.3%	15.3%	14.1%	20.5%	19.7%	17.9%	17.0%
Children <12 years of age	7.1%	6.9%	5.6%	7.2%	8.9%	7.9%	6.6%	5.4%
Grandchildren <12 years of age	0.6%	0.4%	0.6%	1.2%	0.2%	0.0%	0.3%	0.6%

<u>Description of Travel Party*</u>	Pleasure Hotel Guests							
	<u>Total 2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2008</u>	<u>Total 3Q 2008</u>	<u>Total 4Q 2008</u>	<u>Total 1Q 2009</u>
Adult family members or friends	82.6%	77.9%	79.4%	79.4%	78.4%	81.5%	74.6%	79.5%
Self Only	14.5%	17.9%	18.0%	19.2%	16.5%	14.9%	20.2%	16.8%
Children under 12 years of age	13.3%	13.9%	10.9%	11.3%	18.3%	15.8%	15.9%	11.5%
Business Associates	2.4%	2.1%	1.6%	2.5%	1.0%	1.2%	1.2%	1.0%
Grandchildren <12 years of age	1.0%	1.0%	0.0%	2.4%	0.4%	0.0%	0.8%	1.4%

<u>Description of Travel Party*</u>	Business Hotel Guests							
	<u>Total 2Q 2009</u>	<u>Apr.</u>	<u>May</u>	<u>June</u>	<u>Total 2Q 2008</u>	<u>Total 3Q 2008</u>	<u>Total 4Q 2008</u>	<u>Total 1Q 2009</u>
Self Only	57.7%	58.5%	59.0%	56.0%	55.6%	54.7%	60.1%	59.7%
Business Associates	28.0%	31.2%	25.9%	26.0%	33.4%	32.0%	27.9%	30.0%
Adult family members or friends	15.2%	11.1%	15.1%	20.4%	11.1%	13.6%	13.0%	10.8%
Children under 12 years of age	2.4%	1.5%	1.8%	3.3%	2.6%	2.8%	1.2%	0.6%
Grandchildren <12 years of age	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%

*Multiple responses accepted.



Hotel Survey: 2nd Quarter 2009

Place of Origin	Total 1Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
<u>Domestic</u>	89.7% (n=661)	90.1% (n=218)	91.4% (n=218)	88.5% (n=218)	89.6% (n=662)	87.5% (n=645)	84.2% (n=618)	89.6% (n=660)
Florida	26.8% (n=197)	14.9% (n=36)	32.8% (n=78)	37.0% (n=91)	23.8% (n=176)	25.0% (n=184)	17.6% (n=129)	18.1% (n=133)
Midwest	15.6% (n=115)	20.9% (n=51)	11.9% (n=28)	13.0% (n=32)	11.8% (n=88)	10.4% (n=77)	11.8% (n=87)	14.9% (n=110)
Mid Atlantic	13.2% (n=97)	14.8% (n=36)	15.4% (n=37)	7.7% (n=19)	9.9% (n=73)	11.9% (n=88)	12.9% (n=95)	16.5% (n=122)
Southeast (excluding Florida)	13.9% (n=102)	11.2% (n=27)	13.2% (n=31)	17.4% (n=43)	19.8% (n=146)	19.2% (n=142)	17.3% (n=127)	13.8% (n=102)
New York	8.1% (n=59)	10.9% (n=26)	8.4% (n=20)	5.8% (n=14)	10.4% (n=77)	9.2% (n=68)	9.2% (n=68)	12.3% (n=90)
New England	7.4% (n=54)	11.6% (n=28)	6.3% (n=15)	4.1% (n=10)	6.5% (n=48)	5.9% (n=44)	7.7% (n=56)	8.6% (n=63)
Far West	4.8% (n=35)	3.4% (n=14)	3.4% (n=8)	3.6% (n=9)	7.3% (n=54)	5.8% (n=43)	7.7% (n=56)	5.4% (n=40)
<u>International</u>	10.3% (n=75)	9.9% (n=24)	8.6% (n=21)	11.5% (n=28)	10.4% (n=77)	12.5% (n=92)	15.8% (n=116)	10.4% (n=77)
Europe (net)	4.8% (n=35)	3.9% (n=9)	3.2% (n=8)	6.4% (n=16)	4.2% (n=31)	5.8% (n=43)	6.7% (n=49)	4.4% (n=33)
- Germany	0.4% (n=3)	0.9% (n=2)	0.0% (n=0)	0.0% (n=0)	0.9% (n=7)	1.2% (n=9)	1.7% (n=13)	1.0% (n=8)
- England/UK	2.2% (n=16)	1.6% (n=4)	1.4% (n=3)	3.6% (n=9)	1.5% (n=11)	1.0% (n=8)	1.5% (n=11)	1.0% (n=8)
Canada	2.6% (n=19)	3.1% (n=7)	2.6% (n=6)	1.9% (n=5)	3.0% (n=22)	2.4% (n=18)	4.1% (n=30)	2.6% (n=19)
Latin America / Caribbean	2.4% (n=17)	1.8% (n=4)	2.8% (n=7)	2.8% (n=7)	1.9% (n=14)	3.0% (n=22)	3.1% (n=23)	2.6% (n=19)
Australia/Asia	0.5% (n=4)	1.1% (n=3)	0.0% (n=0)	0.3% (n=1)	0.4% (n=3)	0.3% (n=2)	1.0% (n=7)	0.7% (n=5)
Africa	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.4% (n=3)	0.4% (n=3)	0.1% (n=1)
Middle East	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.9% (n=7)	0.6% (n=4)	0.5% (n=4)	0.0% (n=0)



Hotel Survey: 2nd Quarter 2009

Pleasure Vs. Business By Selected Place of Origin	Total 2Q 2009	Apr.	May	June	Total 2Q 2008	Total 3Q 2008	Total 4Q 2008	Total 1Q 2009
<u>Florida</u>	26.8%	14.9%	32.8%	37.0%	23.8%	25.0%	17.6%	18.1%
Business	16.7%	9.9%	19.7%	22.8%	15.3%	14.1%	11.4%	11.8%
Pleasure	9.8%	4.5%	13.4%	13.8%	8.3%	10.1%	6.1%	6.1%
<u>Midwest</u>	15.6%	20.9%	11.9%	13.0%	11.8%	10.4%	11.8%	14.9%
Business	9.5%	12.0%	7.5%	7.7%	7.4%	6.7%	6.7%	7.9%
Pleasure	6.3%	8.7%	4.2%	4.9%	4.2%	3.8%	5.2%	7.1%
<u>Mid Atlantic</u>	13.2%	14.8%	15.4%	7.7%	9.9%	11.9%	12.9%	16.5%
Business	6.0%	7.4%	5.9%	2.8%	4.1%	6.0%	7.4%	6.5%
Pleasure	7.2%	7.4%	9.2%	4.9%	5.7%	6.0%	5.4%	9.6%
<u>Southeast (excluding Florida)</u>	13.9%	11.2%	13.2%	17.4%	19.8%	19.2%	17.3%	13.8%
Business	9.2%	8.3%	9.2%	9.3%	13.8%	12.6%	13.4%	10.0%
Pleasure	4.6%	2.9%	4.2%	7.7%	5.8%	6.3%	3.7%	3.8%
<u>New York</u>	8.1%	10.9%	8.4%	5.8%	10.4%	9.2%	9.2%	12.3%
Business	3.1%	2.9%	2.9%	3.7%	3.8%	3.8%	4.4%	3.5%
Pleasure	4.8%	7.9%	4.6%	2.0%	6.5%	5.3%	4.8%	8.7%
<u>New England</u>	7.4%	11.6%	6.3%	4.1%	6.5%	5.9%	7.7%	8.6%
Business	2.4%	4.1%	1.7%	1.2%	2.2%	2.6%	3.8%	3.7%
Pleasure	4.9%	7.4%	4.6%	2.8%	4.5%	3.1%	3.8%	4.9%
<u>Far West</u>	4.8%	5.7%	3.4%	3.6%	7.3%	5.8%	7.7%	5.4%
Business	3.1%	4.1%	2.5%	1.6%	5.5%	4.3%	5.3%	4.1%
Pleasure	1.6%	1.7%	0.8%	2.0%	1.6%	13.6%	2.2%	1.2%