



Report on Palm Beach County Tourism Third Quarter 2005 (July, August, September)

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Introduction: 3rd Quarter 2005

Background

- The following report contains information collected during the 3rd Quarter 2005 (July, August, and September 2005), the fourth quarter of Fiscal Year 2004/2005.
- Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.



Property Manager Survey: 3rd Quarter 2005

Occupancy Rates

- **The average occupancy rate of participating PBC hotels during the 3rd quarter of 2005 was 63.0% - comparable to the average occupancy rate in the third quarter of 2004 (64.2%) and 9.7 percentage points lower than the average occupancy rate in the second quarter of 2005 (72.7%).**
 - Smaller properties (50-100 rooms) had comparable occupancy rates during 3Q2005 (63.55) to larger properties (101+ rooms, 63.1%).
 - The occupancy rate in 3Q2005 was highest in July among both smaller and larger properties, (65.7% among smaller hotels and 64.6% among larger hotels).
- **The highest occupancy rates were reported by hotels in the Central region of Palm Beach County (68.2%) and the lowest rates were reported by properties in the Southern region (58.7%). Properties in the Northern region reported an average occupancy rate of 61.3%.**
 - Compared to the third quarter of last year, hotels in the central region were the only properties to report an increase in occupancy rates (from 64.1% to 68.2%).
 - All regions reported decreases in occupancy rates compared to last quarter.
- **The estimated number of Palm Beach County hotel room nights occupied* in the third quarter of 2005 was 862,035 – an increase of 2,405 room nights compared to 3Q2004 (859,630) and a decrease of 106,985 room nights compared to last quarter (969,020).**
- **During the months of August and September, property managers were asked what percent of their occupancy was International. Overall, the average percentage of International guests among hotels that responded was 5.1%.**
 - Among larger properties, hotels with 101-219 rooms reported that 8.1% of their guests came from foreign countries while hotels with 220-500 rooms reported that only 0.5% were international.
 - Based on the hotels who responded, properties in the Southern region had the highest percentage of International guests (8.0%).
- **According to surveyed property managers, during 3Q2005 hotel room nights were almost equally occupied by leisure travelers (36.2%) and business travelers (37.8%); the percentage of room nights occupied by convention/group travelers was 26.0%.**
 - The percentage of convention/group travelers (26.0%) decreased by 4.3 percentage points compared to last quarter (30.3%) and was comparable to same quarter last year (24.3%).
- **Conference/convention bookings represented 30.9% of occupied room nights at designated convention hotels - a decrease of 7.0 percentage points compared to last quarter (37.9%).**

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



Property Manager Survey: 3rd Quarter 2005

Hurricane Impact

- During 3Q2005, the majority of property managers (92.2%) claimed that hurricanes in August, September and October of 2004 have had an impact on their properties' reservation to date.
 - The impact was considered low by 16.3% of property managers, moderate by 35.9% and high for 47.8%.
 - About one-half of hotel managers in the Southern and Central Regions affirmed that the hurricanes have had a high impact on their reservations to date (54.5% Central Region and 50.0% Southern Region). Managers from the Northern region were most likely to report that the impact on room reservations was moderate (57.1%).

Average Daily Room Rate (ADR)

- According to participating Palm Beach County properties, in the third quarter of 2005 the average daily room rate (ADR) was \$107.76 – 13.3% more than the ADR recorded in the third quarter of last year (\$95.12) and 25.1% less than the ADR in the previous quarter (\$143.81).
 - The ADR increased 27.3% in the last month of the quarter (from \$103.20 in August to \$131.34 in September).
 - The ADR among larger properties (101+ rooms) was \$108.85 while the ADR among smaller properties was \$103.02.

Future Business Outlook

- During 3Q2005, 42.2% of surveyed property managers claimed that there would be an increase in room revenue compared to the same months last year. Thirty-eight point five percent of surveyed managers predicted a decrease in room revenue and 19.3% predicted no change.
 - Among property managers predicting an increase in room revenue compared to the previous year, the average increase expected was 12.5%.
 - Among property managers expecting a decrease in room revenue compared to the previous year, the average decrease expected was 13.9%.

Bookings Via Third Party Websites

- The percentage of bookings sold via third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc) in the third quarter of 2005 was 12.9% - comparable with 3Q2004 (12.6%) and the same as last quarter (12.9%).
 - Smaller properties (50-100 rooms) booked, on average, 17.1% of their rooms through third party websites while larger properties (101+ rooms) booked 11.2% of their rooms that way.



Hotel Visitor Survey: 3rd Quarter 2005

Characteristics of Stay

- In 3Q2005, the average party size of surveyed hotel visitors was 2.2*, lower than the average party size in 3Q2004 (2.5). The median party size for 3Q2005 and for all months within the quarter was 2.0.
- During the third quarter of 2005, surveyed hotel guests stayed an average of 3.9 nights in a hotel and occupied an average of 1.3 rooms per night*.
- In 3Q2005, slightly more than one-half (51.8%) of Palm Beach County surveyed guests were business travelers (conference/convention/business meeting) and 40.5% claimed to be vacationers.
 - During 3Q2005, the percentage of business travelers was highest in September 2005 (54.4%) whereas the percentage of vacationers was highest in August 2005 (44.6%).
 - Compared to last quarter, there was a decrease of 9.5 percentage points in the percentage of business travelers (from 61.3% to 51.8%) and an increase of 9.7 percentage points in the percentage of vacationers (from 30.8% to 40.5%). However, compared to the same quarter last year, the percentage of business travelers increased by 5.5 percentage points (from 46.3% to 51.8%) while the percentage of vacationers was comparable (40.5% in 3Q2005 and 40.1% in 3Q2004).
- 'General business travel' was the source of information influencing the trip to PBC mentioned most frequently by surveyed hotels guests during the third quarter of 2005 (37.8%). Other sources of information commonly cited were 'recommendation from friends/relatives' (19.2%), 'special event' (12.5%) and 'Internet information' (8.2%).
 - Mention of 'General business travel' (37.8%) increased by 9.7 percentage points compared to 3Q2004 (28.1%) and decreased by 9.0 percentage points compared to last quarter (46.8%).

Planning the Trip to Palm Beach County

- More than one-half of 3Q2005 surveyed guests (56.7%) planned their trip to Palm Beach County one month or less in advance. This represents a 2.8 percentage point decrease compared to 3Q2004 (59.5%) and a 4.1 percentage point increase compared to 2Q2005 (52.6%).
- When asked why they selected PBC over other destinations, 3Q2005 hotel guests most often cited 'Work related trip – no choice in destination' (46.9%), followed by 'visit friends/relatives' (24.2%) and 'previous visit' (11.0%).
 - Mention of 'work-related trip – no choice in destination' increased by 7.4 percentage points as reason to select PBC over other destinations in 3Q2005 (46.9%) compared to 3Q2004 (39.5%).
 - Surveyed hotel guests most often reported that their employer (46.3%) was the decision maker regarding their trip to PBC. This represents an increase of 4.8 percentage points compared to 3Q2004 (41.5%) and a decrease of 6.1 percentage points compared to 2Q2005 (52.4%).

* 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 Visitor Survey: 3rd Quarter 2005

Booking a Trip to Palm Beach County

- **One-quarter of surveyed visitors reported using a travel agent (24.6%) and almost one-half (47.0%) reported using the Internet to book part of their trip to PBC in 3Q2005.**
 - Compared to 2Q2005 (43.7%) and 3Q2004 (44.5%), use of the Internet has increased in 3Q2005 (47.0%).
 - Among those hotel guests who used the Internet to book part of their trip, most used it to book airfare (72.7%), hotel rooms (65.6%), and/or car rentals (43.7%).
 - As seen last quarter, use of hotel websites among surveyed visitors who booked hotel rooms online continued to increase in 2005 compared to last year (from 16.7% in 3Q2004 to 31.5% in 3Q2005, a 14.8 percentage point increase).
 - Only 12.4% of surveyed guests reported that their trip to Palm Beach County was part of a package. This is comparable with 3Q2004 (12.8%) and the 2Q2005 (11.7%).
 - In 3Q2005, approximately seven-in-ten visitors (69.1%) arrived in PBC via airplane - a 3.7 percentage point decrease compared to last quarter (72.8%) and comparable to 3Q2004 (71.0%).

Visitor Expenditures

- **The average per party* expenditure in Palm Beach County in the third quarter of 2005 was \$1,319. This represents a decrease of \$165 (11.1%) compared to last quarter (\$1,484) and is comparable to the third quarter of last year (\$1,344).**
 - All spending categories experienced slight increases compared to the prior year except for Gift/Shopping (from \$222 to \$125 - down \$97 or 43.7%).
 - Both the average per person (\$600) and per person/day (\$154) expenditures decreased compared to last quarter (\$706 per person and \$191 per person/day in 2Q2005, decreases of 15.0 and 19.3 percentage points, respectively) but increased compared to the third quarter of last year (\$538 per person and \$138 per person/day in 3Q2004, increases of 11.5 and 11.6 percentage points, respectively).
- **The average per party expenditure among vacationers in 3Q2005 (\$1,570) was \$453 (40.6%) higher than the average per party expenditure among business travelers (\$1,117) in 3Q2005.**
 - Business travelers spent slightly more per party in 3Q2005 than in 3Q2004 (from \$1,092 to \$1,117 – 2.3% increase) while vacationers spent slightly less per party in 3Q2005 compared to 3Q2004 (from \$1,609 to \$1,570 – 2.4% decrease).
 - Vacationers spent more in PBC than business travelers across all expenditure categories except for Local Travel.
 - Even though vacationers spent more per party, business travelers spent \$28 (19.3%) more per person/per day (vacationers spent \$145 and business travelers spent \$173 per person/per day).

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



Hotel Visitor Survey: 3rd Quarter 2005

Characteristics of Visit

- **First time visitors to Palm Beach County represented 27.8% of surveyed hotels guests in 3Q2005. This is at parity with last quarter (27.2%) and is 3.0 percentage points less than the same time last year (30.8%).**
- **Eighty-two percent of surveyed hotel guests affirmed that they plan to return to Palm Beach County some time in the future.**
 - Among those who plan to visit Palm Beach County again in the future, 69.1% plan to do so in the next year, 31.8% within the next three months.
- **More than 9-in-10 visitors reported dining at area restaurants (93.1%) in 3Q2005. Visitors also frequently mentioned going shopping (38.9%), going to the beach (36.8%) and visiting bars/night clubs (17.0%) during their trip to PBC in 3Q2005.**
 - The percentage of hotel guests who reported shopping and going to the beach declined consistently during the third quarter (from 41.6% to 39.4% to 35.9% for shopping and from 42.6% to 41.0% to 26.7% for going to the beach).

Attitudes toward Palm Beach County – Likes/Dislikes About Trip

- **Surveyed hotel guests continued to report that ‘climate/weather’ is the aspect of Palm Beach County that they like the most (22.1%). ‘Beaches’ (16.4%) and ‘beautiful area’ (11.2%) were also mentioned frequently.**
 - Compared to last quarter (36.1%), there was a noticeable decrease (14.0 percentage points) in the percentage of visitors citing ‘climate/weather’ as the aspect of their trip to PBC they liked best in 3Q2005 (22.1%).
- **‘Traffic/bad drivers’ was the aspect visitors liked least about their trip to PBC in 3Q2005 (23.3%), followed by ‘humidity/poor weather’ (19.7%) and ‘expensive’ (5.3%).**
 - The percentage of those mentioning ‘traffic/bad drivers’ has decreased by 9.6 percentage points compared to last quarter (from 32.9% to 23.3%) but has increased by 4.7 percentage points compared to 3Q2004 (18.6%).
 - Compared to 3Q2004 (when there were two hurricanes in September), the percentage of those mentioning ‘humidity/poor weather’ decreased from 33.5% to 19.7%, a 13.8% point decrease.

Characteristics of Visitors

- **In 3Q2005, Palm Beach County visitors continued to describe themselves as Caucasian (85.9%), professionals (53.4%), with an annual household income of \$100,000 or greater (60.7%, an increase of 10.0 percentage points compared to 3Q2004, 50.7%).**
- **Nine-in-ten visitors were traveling domestically (90.1%), most of the time with adult family members/friends (43.0%) or alone (31.1%).**



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Property Manager Survey



Methodology

Property Manager Survey

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

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

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

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

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



Property Manager Survey: 3rd Quarter 2005

	Total 3Q 2005	July 2005	Aug. 2005	Sept. 2005	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Occupancy Rate								
Month/Quarter	63.0%	64.6%	62.0%	62.9%	64.2%	79.8%	88.3%	72.7%
FYTD (Oct. - Set.)	76.0%	78.7%	77.1%	76.0%	70.9%	79.8%	84.1%	80.2%
Room Nights Occupied^{1*}								
Month/Quarter	862,035+	297,046+	285,090+	279,899+	859,630+	1,052,362+	1,173,859+	969,020+
FYTD (Oct. - Set.)	4,057,276+	3,492,287+	3,777,377+	4,057,276+	4,003,012+	1,052,362+	2,226,221+	3,195,241+
Percentage of Room Nights Occupied								
Leisure	36.2%	39.9%	34.5%	34.2%	35.9%	35.4%	42.1%	35.0%
Business	37.8%	34.3%	40.1%	32.0%	39.8%	37.0%	31.8%	34.7%
Convention/Group	26.0%	25.8%	25.4%	33.9%	24.3%	27.5%	26.1%	30.3%
Average Daily Room Rate²	\$107.76	\$105.31	\$103.20	\$131.34	\$95.12	\$134.98	\$206.84	\$143.81

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

1. Room nights occupied = ((# total rooms*occupancy) * (# of room nights per month/quarter))

2. ADR = Average rate per occupied room.

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



Property Manager Survey: 3rd Quarter 2005

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>97/98</u>	<u>98/99</u>	<u>99/00</u>	<u>00/01</u>	<u>01/02</u>	<u>02/03</u>	<u>03/04</u>	<u>04/05</u>
3rd Quarter (July/August/Sept.)	N/A	N/A	N/A	N/A	57.3	57.8	64.2	63.0
July	64.6	62.8	63.5	61.6	60.0	60.8	66.9	64.6
August	60.1	59.9	61.2	60.8	59.7	60.5	63.7	62.0
September	53.7	50.8	57.2	43.1	52.0	51.9	61.5	62.9
4th Quarter (Oct/Nov/Dec)	N/A	N/A	N/A	N/A	57.5	59.8	64.2	79.8
1st Quarter (Jan/Feb/Mar)	N/A	N/A	N/A	N/A	76.2	77.9	83.8	88.3
2nd Quarter (April/May/June)	N/A	N/A	N/A	N/A	65.1	67.0	71.8	72.7
Fiscal YTD (Oct. – Sept.)	68.2	66.7	68.8	67.3	64.1	65.7	70.9	76.0
Number of Room Nights Occupied in 3rd Quarter*							859,630+	862,035+

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

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



Property Manager Survey: 3rd Quarter 2005

	<u>Total 3Q 2005</u>	<u>July</u>	<u>August</u>	<u>September</u>	<u>Total 3Q 2004</u>	<u>Total 4Q 2004</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>
Conference/Convention Bookings								
<u>All Hotels</u>								
% Occupied Room Nights in County	26.0%	25.8%	25.4%	33.9%	24.3%	27.5%	26.1%	30.3%
Occupied Room Nights in County	243,936	76,637	72,413	94,886	209,662	286,890	307,071	295,390
Occupied Room Nights in County FYTD (Oct.- Sept.)	1,133,287	965,988	1,038,401	1,133,287	1,041,953	286,890	593,961	889,351
<u>Convention Hotels</u>								
% Occupied Room Nights	30.9%	29.0%	29.2%	42.6%	30.8%	36.2%	31.6%	37.9%
Occupied Room Nights	134,005	40,406	37,565	56,034	125,531	169,605	180,909	185,481
Occupied Room Nights FYTD (Oct.- Sept.)	670,000	576,401	613,966	670,000	647,721	169,605	350,514	535,995
Available Inventory*								
Rooms in County	44,499	14,833	14,833	14,833	43,603	43,070	44,356	44,083
Room Nights	1,364,636+	459,823+	459,823+	444,990+	1,338,861+	1,320,661+	1,330,519+	1,337,086+
Room Nights FYTD (Oct.- Sept.)	5,352,902+	4,448,089+	4,907,912+	5,352,902+	5,641,246+	1,320,661+	2,651,180+	3,988,266+
Response Rate								
Month/Quarter (for all hotels in County)	62.9%	61.4%	66.2%	61.0%	67.0%	67.5%	66.8%	63.1%
FYTD (Oct.- Sept.)	65.1%	65.4%	65.5%	65.1%	67.9%	67.5%	67.2%	65.8%

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

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



Property Manager Survey: 3rd Quarter 2005

Occupancy Rate	Total 3Q 2005	July	August	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Size of Hotel								
50 - 100 Rooms	63.5%	65.7%	62.0%	63.1%	62.1%	79.2%	87.4%	66.7%
101 + Rooms	63.1%	64.6%	62.3%	62.9%	64.6%	80.0%	88.5%	73.8%
101-219	66.0%	66.7%	65.4%	65.8%	69.1%	84.1%	89.9%	73.1%
220-500	58.6%	61.6%	60.3%	54.2%	59.9%	77.3%	86.2%	73.7%
All Properties	63.0%	64.6%	62.0%	62.9%	64.2%	79.8%	88.3%	72.7%
Geographic Region								
North	61.3%	62.0%	60.3%	62.0%	63.9%	80.3%	86.5%	71.3%
Central	68.2%	72.5%	68.2%	63.5%	64.1%	80.7%	90.0%	75.5%
South	58.7%	58.1%	56.7%	62.7%	64.4%	78.8%	87.7%	70.8%

<u>What percent of your occupancy is international?++</u>	<u>3Q05 (Aug and Sep)</u>	<u>August</u>	<u>September</u>
Size of Hotel			
50-100 Rooms	6.8%	9.5%	1.4%
101 + Rooms	4.7%	5.1%	3.7%
101-219	8.1%	9.4%	6.9%
220-500	0.5%	0.7%	0.2%
Total Hotel Size	5.1%	6.1%	3.5%
Geographic Region			
North	2.4%	3.8%	1.5%
Central	3.2%	4.3%	1.3%
South	8.0%	9.1%	5.1%

++Caution: Extremely low base sizes



Property Manager Survey: 3rd Quarter 2005

Average Daily Room Rate	Total <u>3Q 2005</u>	<u>July</u>	<u>August</u>	<u>Sept.</u>	Total <u>3Q 2004</u>	Total <u>4Q 2004</u>	Total <u>1Q 2005</u>	Total <u>2Q 2005</u>
<u>Size of Hotel</u>								
<u>50 - 100 Rooms</u>	\$103.02	\$110.80	\$100.81	\$97.17	\$91.52	\$132.25	\$180.22	\$125.42
<u>101 + Rooms</u>	\$108.85	\$104.46	\$103.82	\$136.68	\$96.09	\$135.91	\$211.33	\$146.79
101-219	\$91.61	\$85.45	\$89.43	\$100.80	\$81.08	\$100.85	\$163.97	\$112.43
220-500	\$107.56	\$108.32	\$105.83	\$108.73	\$98.03	\$133.63	\$212.75	\$150.23
<u>All Properties</u>	\$107.76	\$105.31	\$103.20	\$131.34	\$95.12	\$134.98	\$206.84	\$143.81



Property Manager Survey: 3rd Quarter 2005

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
3Q		
2003	829,143	
2004	859,630	3.7
2005	862,035+	0.3
July		
2003		
2004	318,924	8.5
2005	297,046+	- 6.9
August		
2003	292,447	
2004	303,689	3.8
2005	285,090+	- 6.1
September		
2003	242,799	
2004	237,017+	- 2.4
2005	279,899+	18.1
4Q		
2003	934,055	
2004	1,052,362	12.7
2005		
1Q		
2003	1,100,056	
2004	1,186,693	7.9
2005	1,173,859+	- 1.1
2Q		
2003	953,428	
2004	1,022,634	7.3
2005	969,020	- 5.2
FYTD (October – June)		
2003	1,959,856	
2004	2,120,748	8.2
2005	2,226,221+	5.0

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

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



Property Manager Survey: 3rd Quarter 2005

Impact of last year's hurricanes on property's reservations	<u>Total</u>	<u>North Region</u>	<u>Central Region</u>	<u>South Region</u>
3rd Quarter (July, August, Sept.)				
Impact	92.2%	83.3%	93.9%	94.4%
High	47.8%	21.4%	54.5%	50.0%
Moderate	35.9%	57.1%	31.8%	32.4%
Low	16.3%	21.4%	13.6%	17.6%
No Impact	7.8%	16.7%	6.1%	5.6%
July				
Impact	85.3%	66.7%	89.5%	83.3%
High	46.4%	50.0%*	50.0%	40.0%
Moderate	35.7%	50.0%*	25.0%	50.0%
Low	17.9%	0.0%	25.0%	10.0%
No Impact	14.7%	33.3%	10.5%	16.7%
August				
Impact	100.0%	100.0%	100.0%	100.0%
High	50.0%	14.3%	50.0%	66.7%
Moderate	36.8%	57.1%	43.8%	20.0%
Low	13.2%	28.6%	6.3%	13.3%
No Impact	0.0%	0.0%	0.0%	0.0%
September				
Impact	89.7%	71.4%	92.3%	100.0%
High	46.2%	20.0%	66.7%	33.3%
Moderate	34.6%	60.0%	25.0%	33.3%
Low	19.2%	20.0%	8.3%	33.3%
No Impact	10.3%	28.6%	7.7%	0.0%



Property Manager Survey: 3rd Quarter 2005

Future Business Outlook (for each month as compared to the same month in previous year)	<u>Total Room Revenue</u>	<u>Group/Indiv. Business Room Revenue</u>	<u>Individual Vacation Room Revenue</u>
August 2005 / September 2005 predictions from July			
Foresee Decrease	26.1%	26.3%	31.2%
Average decrease (among those who foresee decrease)	15.0%	21.2%	11.7%
Foresee No Change	23.0%	24.1%	31.6%
Foresee Increase	50.9%	49.5%	37.2%
Average increase (among those who foresee increase)	8.1%	9.0%	5.7%
September 2005 / October 2005 predictions from August			
Foresee Decrease	37.7%	35.6%	37.3%
Average decrease (among those who foresee decrease)	15.6%	13.6%	12.2%
Foresee No Change	22.9%	22.9%	25.1%
Foresee Increase	39.4%	41.6%	37.6%
Average increase (among those who foresee increase)	14.7%	15.8%	11.9%
October 2005 / November 2005 predictions from September			
Foresee Decrease	54.0%	52.0%	52.5%
Average decrease (among those who foresee decrease)	11.4%	10.9%	8.7%
Foresee No Change	9.8%	7.5%	14.1%
Foresee Increase	36.2%	40.6%	33.4%
Average increase (among those who foresee increase)	15.2%	14.8%	18.4%
Third Quarter predictions from July, August and September			
Foresee Decrease	38.5%	37.1%	39.3%
Average decrease (among those who foresee decrease)	13.9%	14.5%	10.9%
Foresee No Change	19.3%	18.9%	24.3%
Foresee Increase	42.2%	44.0%	36.4%
Average increase (among those who foresee increase)	12.5%	13.3%	11.8%



Property Manager Survey: 3rd Quarter 2005

Bookings via third party website	Total 3Q 2005	July	August	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Size of Hotel								
<u>50 - 100 Rooms</u>	17.1%	10.8%	20.2%	21.3%	12.9%	16.4%	17.8%	18.8%
<u>101 + Rooms</u>	11.2%	11.9%	12.3%	8.8%	12.1%	9.5%	11.0%	10.4%
101-219	11.2%	13.3%	10.2%	10.0%	12.6%	10.5%	11.8%	11.5%
220-500	13.2%	4.8%	24.2%	5.0%	9.6%	5.1%	8.4%	7.0%
<u>All Properties</u>	12.9%	11.7%	14.1%	12.2%	12.6%	11.4%	12.4%	12.9%



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.



Hotel Survey: 3rd Quarter 2005

Characteristics of Stay	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Average Party Size *	2.2	2.2	2.3	2.1	2.5	2.0	2.3	2.1
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	4.0	4.2	4.0	3.7	4.1	3.9	5.3	3.8
Nights in Hotel	3.9	4.2	3.8	3.7	3.9	3.7	4.9	3.7
Rooms per Night *	1.3	1.3	1.3	1.3	1.3	1.4	1.3	1.3

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



Hotel Survey: 3rd Quarter 2005

Visitor Expenditures	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Average Expenditure Per Visit								
Lodging	\$566	\$559	\$555	\$574	\$542	\$592	\$1,132	\$636
Restaurant/Bar	\$347	\$399	\$327	\$322	\$328	\$325	\$544	\$352
Gifts/Shopping	\$125	\$172	\$118	\$85	\$222	\$181	\$407	\$233
Entertainment/Recreation	\$86	\$84	\$87	\$93	\$70	\$52	\$113	\$85
Local Travel	\$164	\$160	\$152	\$181	\$160	\$174	\$294	\$167
Side Trips	\$32	\$20	\$65	\$12	\$22	\$25	\$69	\$11
Total Per Party	\$1,319	\$1,393	\$1,304	\$1,266	\$1,344	\$1,349	\$2,558	\$1,484
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$600	\$633	\$567	\$603	\$538	\$675	\$1,112	\$706
Total Per Person/Per Day	\$154	\$151	\$149	\$163	\$138	\$182	\$227	\$191
Lodging	\$66	\$60	\$63	\$74	\$56	\$80	\$100	\$82
Restaurant/Bar	\$40	\$43	\$37	\$41	\$34	\$44	\$48	\$45
Gifts/Shopping	\$15	\$19	\$13	\$11	\$23	\$25	\$36	\$30
Entertainment/Recreation	\$10	\$9	\$10	\$12	\$7	\$7	\$10	\$11
Local Travel	\$19	\$17	\$17	\$23	\$16	\$24	\$26	\$21
Side Trips	\$4	\$2	\$7	\$2	\$2	\$3	\$6	\$1

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



Hotel Survey: 3rd Quarter 2005

Visitor Expenditures	<u>Pleasure</u>							
	<u>Total 3Q 2005</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2004</u>	<u>Total 4Q 2004</u>	<u>Total 1Q 2005</u>	<u>Total 2Q 2005</u>
Average Expenditure Per Visit								
Lodging	\$596	\$507	\$761	\$492	\$593	\$770	\$1,651	\$788
Restaurant/Bar	\$420	\$396	\$489	\$343	\$409	\$473	\$838	\$475
Gifts/Shopping	\$192	\$244	\$216	\$99	\$310	\$397	\$710	\$427
Entertainment/Recreation	\$136	\$111	\$165	\$125	\$90	\$108	\$147	\$145
Local Travel	\$164	\$133	\$179	\$165	\$181	\$203	\$435	\$202
Side Trips	\$62	\$30	\$127	\$22	\$27	\$50	\$120	\$15
Total Per Party	\$1,570	\$1,421	\$1,937	\$1,246	\$1,609	\$2,000	\$3,902	\$2,052
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$581	\$547	\$692	\$479	\$575	\$769	\$1,501	\$789
Total Per Person/Per Day	\$145	\$148	\$147	\$145	\$131	\$171	\$235	\$179
Lodging	\$55	\$53	\$58	\$57	\$49	\$66	\$99	\$69
Restaurant/Bar	\$39	\$41	\$37	\$40	\$34	\$40	\$50	\$42
Gifts/Shopping	\$18	\$25	\$16	\$12	\$26	\$34	\$43	\$37
Entertainment/Recreation	\$13	\$12	\$13	\$15	\$8	\$9	\$9	\$13
Local Travel	\$15	\$14	\$14	\$19	\$15	\$17	\$26	\$18
Side Trips	\$6	\$3	\$10	\$3	\$2	\$4	\$7	\$1

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



Hotel Survey: 3rd Quarter 2005

Visitor Expenditures	Business							
	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Average Expenditure Per Visit								
Lodging	\$536	\$593	\$383	\$636	\$494	\$530	\$653	\$554
Restaurant/Bar	\$293	\$386	\$209	\$304	\$259	\$269	\$288	\$287
Gifts/Shopping	\$68	\$83	\$46	\$76	\$133	\$92	\$154	\$132
Entertainment/Recreation	\$46	\$51	\$32	\$60	\$53	\$31	\$74	\$59
Local Travel	\$167	\$184	\$125	\$196	\$137	\$160	\$166	\$145
Side Trips	\$7	\$11	\$6	\$5	\$17	\$15	\$19	\$9
Total Per Party	\$1,117	\$1,308	\$801	\$1,277	\$1,092	\$1,097	\$1,353	\$1,187
Average Expenditure Per Person Per Day (based on average # of persons per party)								
Total Per Person	\$657	\$770	\$445	\$798	\$546	\$645	\$712	\$698
Total Per Person/Per Day	\$173	\$167	\$153	\$200	\$156	\$190	\$223	\$212
Lodging	\$83	\$76	\$73	\$99	\$71	\$92	\$107	\$99
Restaurant/Bar	\$45	\$49	\$40	\$48	\$37	\$46	\$47	\$51
Gifts/Shopping	\$11	\$11	\$9	\$12	\$19	\$16	\$25	\$24
Entertainment/Recreation	\$7	\$6	\$6	\$9	\$8	\$5	\$12	\$11
Local Travel	\$26	\$24	\$24	\$31	\$20	\$28	\$27	\$26
Side Trips	\$1	\$1	\$1	\$1	\$2	\$3	\$3	\$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: 3rd Quarter 2005

Planning the Trip to Palm Beach County	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Reason for Trip								
Conference/Convention/ Business Meeting	51.8%	51.8%	48.7%	54.4%	46.3%	66.2%	46.2%	61.3%
- Business Meeting	46.1%	46.9%	42.7%	48.3%	38.9%	57.1%	41.6%	50.2%
- Conference/Convention	5.4%	4.9%	5.6%	5.7%	6.2%	7.9%	4.4%	10.3%
- Other Business	0.3%	0.0%	0.4%	0.4%	1.2%	1.2%	0.1%	0.8%
Vacation/Pleasure	40.5%	40.2%	44.6%	37.2%	40.1%	25.5%	44.0%	30.8%
Sporting Event	0.9%	2.0%	0.4%	0.4%	1.7%	2.8%	4.3%	3.1%
Cultural Event/Attraction	0.5%	0.4%	0.8%	0.4%	0.2%	0.2%	0.8%	0.4%
Film/TV location scouting/production	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%	0.0%
Other	6.3%	5.6%	4.8%	7.7%	11.4%	5.3%	4.7%	3.7%
Sources of Information Influencing Trip*								
General Business Travel	37.8%	37.5%	36.2%	39.1%	28.1%	49.0%	37.6%	46.8%
Recommendation from Friends/Relatives	19.2%	23.3%	21.9%	12.1%	23.3%	14.0%	17.3%	12.3%
Special Event	12.5%	12.9%	8.2%	16.5%	16.6%	15.2%	10.3%	15.7%
Internet Information	8.2%	6.3%	10.1%	8.4%	8.3%	3.6%	3.0%	3.7%
Hotel/Attraction Brochures	6.0%	4.6%	9.6%	3.9%	5.4%	3.2%	4.1%	4.4%
- Hotel Brochures	5.1%	4.6%	7.8%	2.9%	4.4%	2.5%	3.3%	3.9%
- Attraction Brochures	1.2%	0.0%	2.7%	1.0%	2.3%	0.9%	1.1%	1.2%
Travel Agency Recommendation	1.6%	1.4%	2.3%	1.0%	2.0%	1.9%	1.3%	1.4%
PBC-CVB	1.4%	0.0%	1.8%	2.4%	3.5%	0.8%	0.6%	0.5%
Sports Event in PBC (other than Spring Training)	1.1%	1.8%	0.9%	0.5%	1.9%	1.9%	3.9%	2.8%
Newspaper/Magazine Article	0.8%	0.9%	0.9%	0.5%	1.6%	0.6%	0.6%	0.8%
Art/Cultural Event	0.5%	0.0%	0.5%	1.0%	0.3%	0.4%	2.0%	0.5%
Newspaper/ Magazine Advertising	0.3%	0.4%	0.5%	0.0%	1.4%	0.5%	0.6%	0.2%
County/State Tourist Agency	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	0.6%	0.3%
Spring Training	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	2.3%	0.3%
Other	18.4%	17.7%	17.2%	20.5%	16.9%	15.7%	23.7%	19.5%
- Previous visits	6.5%	5.5%	6.8%	7.4%	2.4%	3.7%	10.9%	5.4%
- Visit Friends/Relatives	3.7%	2.8%	3.6%	4.8%	4.6%	4.5%	4.2%	3.8%

* Multiple responses accepted.



Hotel Survey: 3rd Quarter 2005

Planning the Trip to Palm Beach County (Continued)	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Who Made the Decision								
Employer	46.3%	45.5%	42.8%	50.3%	41.5%	60.2%	43.0%	52.4%
Both Household Heads	23.8%	23.2%	25.6%	22.4%	23.5%	18.4%	30.3%	19.6%
Male Head of Household	11.8%	12.8%	12.9%	9.7%	10.7%	9.4%	12.7%	12.3%
Female Head of Household	11.5%	12.9%	12.1%	9.6%	12.4%	6.8%	8.8%	10.9%
Children Influenced Decision	2.0%	1.7%	1.2%	3.1%	3.7%	2.2%	1.7%	2.5%
Other Traveling Companion	4.7%	3.9%	5.4%	4.8%	8.4%	3.1%	3.5%	2.4%
Advanced Planning								
One Month or Less	56.7%	61.1%	55.3%	53.6%	59.5%	56.8%	45.0%	52.6%
2 to 3 Months	20.9%	18.9%	20.4%	23.5%	17.9%	21.7%	25.2%	22.6%
More than 3 Months	22.4%	20.0%	24.4%	22.9%	22.6%	21.4%	29.8%	24.8%
Reasons for Selecting Palm Beach County Over Other Destinations*								
Work Related Trip Including Business Meeting/Convention – Did not have a choice in destination	46.9%	45.9%	43.3%	51.1%	39.5%	57.5%	42.8%	54.3%
Visit Friends/Relatives	24.2%	25.3%	25.8%	21.6%	26.7%	16.7%	26.9%	16.9%
Previous Visit	11.0%	11.3%	13.2%	8.5%	11.0%	7.6%	14.8%	8.7%
Beaches	7.4%	4.2%	10.3%	7.7%	13.2%	3.3%	4.5%	4.5%
Weather	5.7%	2.5%	9.1%	5.6%	11.7%	5.1%	8.0%	4.6%
Work Related Trip – Had a choice in destination	5.3%	7.9%	4.9%	3.0%	6.1%	7.1%	4.1%	6.1%
Convenient/Inexpensive Flights	4.7%	3.8%	5.4%	5.2%	8.1%	3.5%	6.8%	5.5%
Golf/Tennis/Recreation	4.3%	4.6%	3.7%	4.8%	2.0%	1.9%	4.5%	3.1%
Saw Advertising Promotion	3.1%	3.7%	3.8%	1.7%	3.6%	0.8%	0.4%	0.8%
Cultural Activities	1.0%	0.8%	1.2%	0.8%	1.7%	1.1%	1.4%	0.8%
Compete in Sporting Event	0.4%	0.0%	0.4%	0.9%	1.9%	0.7%	2.1%	0.8%
Other	9.2%	9.1%	9.0%	9.3%	9.0%	8.3%	6.3%	8.5%

* Multiple responses accepted.



Hotel Survey: 3rd Quarter 2005

Planning the Trip to Palm Beach County (Continued)	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Booked Trip with Travel Agency								
Yes	24.6%	21.5%	29.4%	22.6%	22.0%	26.9%	24.2%	21.7%
No	75.4%	78.5%	70.6%	77.4%	78.0%	73.1%	75.8%	78.3%
Booked Any Part of Trip Using Internet								
Yes	47.0%	45.7%	46.5%	49.3%	44.5%	42.9%	41.0%	43.7%
No	53.0%	54.3%	53.5%	50.7%	55.5%	57.1%	59.0%	56.3%
Booked Any Part of Trip Using Internet* (among those who used the Internet)								
Air	72.7%	66.8%	73.2%	77.4%	76.1%	77.3%	80.9%	76.1%
Hotel	65.6%	63.8%	69.5%	63.7%	54.1%	53.8%	55.0%	65.8%
Hotel website	31.5%	36.5%	36.5%	22.6%	16.7%	25.9%	27.1%	31.4%
Expedia	7.1%	8.4%	7.2%	5.9%	8.0%	6.5%	3.5%	3.9%
hotels.com	2.9%	1.9%	3.5%	3.4%	5.7%	2.8%	4.6%	2.0%
Orbitz	2.7%	1.8%	4.4%	1.7%	4.8%	1.1%	1.8%	3.6%
Travelocity	2.4%	1.9%	3.6%	1.7%	5.4%	1.5%	1.8%	1.3%
Hotwire	0.0%	0.0%	0.0%	0.0%	0.5%	0.9%	0.0%	0.3%
Other Website	5.1%	2.9%	6.2%	5.9%	4.4%	3.3%	2.9%	2.6%
Don't Remember	14.0%	10.4%	8.1%	22.6%	8.5%	11.7%	13.3%	20.7%
Car Rental	43.7%	34.1%	44.4%	51.2%	43.5%	43.2%	47.1%	43.6%
Tickets to Event	1.2%	1.9%	0.9%	0.8%	1.8%	1.2%	1.1%	1.0%
Other	2.7%	3.8%	0.9%	3.5%	0.4%	3.5%	2.2%	1.6%
Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)								
Yes	12.4%	11.8%	15.7%	9.5%	12.8%	6.3%	10.3%	11.7%
No	87.6%	88.2%	84.3%	90.5%	87.2%	93.7%	89.7%	88.3%
Type of Transportation								
Airplane	69.1%	61.8%	70.6%	74.6%	71.0%	76.4%	80.7%	72.8%
Car	30.7%	37.8%	29.0%	25.4%	28.6%	23.2%	18.9%	26.8%
Other	0.3%	0.4%	0.4%	0.0%	0.5%	0.4%	0.4%	0.4%

* Multiple responses accepted.



Hotel Survey: 3rd Quarter 2005

Characteristics of the Visit	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
<u>Main Destination</u>								
Palm Beach County	90.4%	89.7 %	92.7%	88.6%	90.2%	91.8%	90.3%	93.2%
Ft. Lauderdale	4.5%	3.7%	2.9%	6.9%	5.5%	4.0%	4.0%	2.8%
<u>First Trip to PBC</u>								
	27.8%	29.6 %	29.4%	24.5%	30.8%	25.3%	25.9%	27.2%
<u>Plan to Return to PBC</u>								
	82.0%	83.3%	81.1%	81.4%	78.8%	80.0%	82.9%	82.0%
<u>When do you plan on returning to PBC?</u>								
Within the next 3 months	31.8%	34.2%	33.3%	27.7%	32.9%	34.3%	24.5%	28.4%
Within the next 6 months	13.8%	9.8%	16.4%	15.4%	15.2%	14.0%	11.5%	14.7%
Within the next year	23.5%	23.3%	23.9%	23.4%	19.6%	23.4%	30.8%	22.3%
Within the next few years	9.6%	7.8%	12.0%	9.1%	12.3%	8.6%	10.5%	10.7%
Don't Know	21.3%	24.5%	14.3%	24.4%	20.0%	19.6%	22.8%	23.8%
<u>Description of Travel Party*</u>								
Adult family members or friends	43.0%	45.4%	41.9%	42.0%	50.2%	36.9%	52.8%	43.6%
Self Only	31.1%	31.9%	30.6%	30.6%	23.1%	33.1%	22.9%	32.2%
Business Associates	22.2%	20.1%	22.0%	24.5%	24.2%	28.6%	21.6%	21.8%
Children <12 years of age	11.5%	12.6%	12.6%	9.6%	12.2%	6.1%	9.3%	8.6%
Grandchildren <12 years of age	0.8%	0.8%	0.4%	1.3%	0.7%	0.7%	0.7%	0.8%

* Multiple responses accepted.



Hotel Survey: 3rd Quarter 2005

Characteristics of the Visit (Continued)	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Participation in Specific Activities*								
Restaurants	93.1%	92.8%	94.5%	91.7%	93.9%	95.0%	95.3%	94.9%
Shopping	38.9%	41.6%	39.4%	35.9%	39.7%	38.7%	47.3%	36.9%
Went to Beach	36.8%	42.6%	41.0%	26.7%	35.5%	29.7%	39.6%	33.8%
Bars/Nightclubs	17.0%	15.5%	14.9%	20.7%	16.4%	14.8%	12.3%	13.5%
Visited downtown West Palm Beach Attractions/City Place	14.2%	12.2%	19.9%	10.8%	13.3%	9.3%	14.8%	7.3%
Golf, Tennis	12.1%	12.7%	10.6%	13.2%	7.6%	9.2%	18.7%	9.8%
Visited downtown Delray Beach Attractions	11.4%	11.8%	9.0%	13.4%	8.7%	6.3%	13.0%	8.5%
Visited Mizner Park/Boca Raton	8.4%	12.2%	7.7%	5.2%	6.9%	6.7%	12.5%	7.4%
Other Water Activities	8.1%	8.0%	8.8%	7.4%	9.3%	4.1%	4.3%	9.7%
Boating/Fishing/Diving	6.8%	8.0%	8.1%	4.3%	5.2%	2.7%	3.8%	3.9%
Attractions	4.2%	4.2%	5.5%	3.0%	4.7%	3.3%	3.3%	4.3%
Museums, Art galleries	4.0%	3.8%	5.5%	2.6%	2.8%	2.4%	5.4%	3.1%
Visited Wildlife Refuge	3.0%	3.4%	3.0%	2.6%	3.2%	2.0%	4.2%	2.9%
Took a Cruise	1.7%	2.1%	2.5%	0.4%	1.6%	1.8%	1.7%	1.9%
Performing Arts (plays, concerts, dance)	1.6%	2.5%	0.8%	1.3%	1.5%	1.4%	3.7%	1.9%
Visited downtown Lake Worth	1.4%	0.9%	1.7%	1.7%	1.4%	1.0%	2.7%	0.8%
Visited Riviera Beach/Singer Island	1.3%	1.3%	2.1%	0.4%	2.9%	2.1%	0.4%	0.7%
Pari-mutuels	0.7%	0.0%	1.3%	0.9%	1.2%	0.6%	0.6%	0.3%
Competed in Sports	0.7%	1.2%	0.4%	0.4%	1.8%	0.6%	1.5%	1.2%
Attended a Sporting Event	0.4%	1.3%	0.0%	0.0%	1.1%	1.6%	3.1%	1.4%
Palm Beach County Convention Center	0.3%	0.4%	0.0%	0.4%	0.2%	1.8%	1.3%	0.0%
Other	5.4%	5.4%	4.6%	6.1%	6.3%	7.2%	7.9%	8.4%

* Multiple responses accepted.



Hotel Survey: 3rd Quarter 2005

Attitudes about Trip to Palm Beach County	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Things Liked Best – Top Mentions								
Climate/Weather	22.1%	20.1%	18.8%	27.8%	22.7%	47.7%	54.5%	36.1%
Beaches/Ocean	16.4%	19.0%	17.8%	12.2%	13.7%	11.7%	8.9%	11.3%
Beautiful Area/Nice Place	11.2%	11.7%	10.9%	10.7%	11.4%	9.0%	7.1%	10.0%
Hotel	6.6%	8.3%	5.8%	5.7%	7.0%	1.7%	1.8%	3.1%
Visiting Friends/Relatives	6.0%	4.0%	7.3%	6.9%	3.9%	3.8%	2.9%	3.4%
Nice People	5.7%	3.6%	6.8%	6.8%	6.0%	4.0%	3.5%	4.5%
Cleanliness	4.1%	4.6%	4.2%	3.4%	3.9%	2.4%	3.0%	4.2%
Restaurant	3.5%	3.6%	3.1%	3.9%	3.7%	2.0%	2.4%	1.4%
Relaxing Atmosphere	3.0%	3.2%	3.6%	2.2%	3.9%	0.4%	1.8%	1.9%
Location	2.1%	2.0%	2.6%	1.7%	1.9%	2.4%	1.0%	2.2%
Shopping	1.6%	2.0%	1.1%	1.7%	2.1%	2.5%	1.8%	3.5%
Golf	1.6%	2.1%	0.5%	2.3%	0.8%	0.4%	1.2%	1.9%
Palm Trees/Vegetation	1.6%	1.0%	1.6%	2.2%	1.0%	0.4%	0.5%	0.5%
Everything	1.4%	1.5%	2.1%	0.6%	5.2%	2.3%	0.8%	3.0%
City Place	1.4%	0.5%	2.1%	1.7%	1.6%	0.5%	1.3%	0.3%
Other	12.2%	12.8%	11.2%	12.2%	12.3%	9.0%	8.0%	13.2%



Hotel Survey: 3rd Quarter 2005

Attitudes about Trip to Palm Beach County	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Things Liked Least – Top Mentions								
Traffic/Bad Drivers	23.3%	22.0%	25.5%	22.0%	18.6%	36.2%	37.9%	32.9%
Humidity/Poor Weather	19.7%	13.9%	23.1%	23.2%	33.5%	12.0%	11.0%	22.0%
Expensive	5.3%	6.5%	4.3%	4.9%	7.3%	5.7%	6.6%	6.9%
Road Construction	2.9%	5.6%	1.7%	0.9%	6.5%	6.3%	2.7%	3.0%
Crowded	2.7%	2.5%	3.4%	2.0%	1.1%	5.1%	6.9%	2.7%
Hotel/Restaurants (general)	2.1%	1.6%	0.8%	4.0%	2.7%	2.4%	6.3%	2.4%
Unfriendly People	1.8%	4.0%	0.0%	1.0%	3.0%	2.2%	1.8%	1.8%
Lack of Directional Signs	1.8%	0.8%	3.4%	0.9%	0.0%	1.5%	2.1%	1.5%
Stay Was Too Short	1.8%	1.7%	1.7%	2.0%	2.1%	1.9%	0.3%	1.5%
Appearance	0.9%	1.7%	0.8%	0.0%	0.8%	0.7%	2.4%	1.2%
Crime	0.9%	2.4%	0.0%	0.0%	0.9%	0.8%	0.6%	0.3%
Lack of Nearby Restaurants	0.9%	0.0%	0.8%	2.1%	0.0%	0.0%	0.0%	0.0%
Lack of Taxis	0.6%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.3%
Need more attractions	0.6%	0.0%	0.0%	2.0%	0.0%	0.8%	0.0%	0.3%
Other	13.2%	14.6%	12.7%	11.0%	11.6%	13.1%	15.0%	16.2%
<u>Nothing liked least</u>	22.1%	22.7%	21.5%	21.8%	12.1%	9.8%	6.3%	7.2%



Hotel Survey: 3rd Quarter 2005

Characteristics of Visitors	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Age								
18 to 24	2.7%	2.4%	3.2%	2.4%	5.4%	1.3%	2.0%	2.1%
25 to 34	16.1%	17.4%	13.7%	17.2%	18.1%	14.4%	14.0%	13.1%
35 to 44	32.0%	31.2%	29.9%	35.0%	26.4%	29.8%	23.8%	29.2%
45 to 54	25.8%	19.5%	29.8%	28.1%	29.6%	28.7%	27.8%	30.0%
55 to 64	18.0%	20.5%	19.7%	13.7%	13.6%	19.8%	18.8%	17.1%
65 +	5.4%	8.9%	3.6%	3.6%	6.9%	6.0%	13.5%	8.5%
Household Size								
One	14.7%	15.4%	14.2%	14.6%	10.7%	13.5%	11.7%	13.8%
Two	34.5%	37.3%	36.0%	30.1%	36.3%	41.4%	46.2%	37.6%
Three	17.8%	18.6%	15.6%	19.1%	17.9%	16.0%	13.6%	16.3%
Four or More	33.0%	28.7%	34.1%	36.6%	35.1%	29.0%	28.5%	32.3%
Occupation								
Prof/Managerial	53.4%	51.4%	51.5%	57.5%	49.7%	52.2%	50.4%	56.4%
Sales	14.9%	14.3%	12.6%	17.7%	11.1%	18.9%	16.5%	15.0%
Technical	7.7%	6.4%	10.9%	5.6%	8.2%	8.9%	4.5%	5.5%
Retired	7.0%	9.0%	7.6%	4.5%	9.8%	7.1%	13.7%	9.0%
Homemaker	5.7%	4.9%	6.1%	6.1%	4.5%	4.1%	5.4%	5.0%
Service	5.3%	6.9%	4.9%	4.1%	4.0%	3.5%	3.1%	3.7%
Clerical	2.1%	1.7%	1.6%	2.8%	3.0%	1.1%	1.0%	1.4%
Student	1.6%	0.8%	2.8%	1.2%	3.2%	0.5%	0.8%	0.4%
Other	2.3%	4.6%	2.0%	0.4%	6.5%	3.8%	4.5%	3.7%
Ethnicity								
White Non-Hispanic	85.9%	88.3%	86.0%	83.2%	81.8%	89.2%	92.0%	88.1%
African-American	6.2%	5.0%	8.7%	4.8%	9.3%	4.1%	3.0%	4.6%
Hispanic	5.4%	5.0%	3.7%	7.7%	6.2%	4.1%	2.3%	4.7%
Asian	2.4%	1.7%	1.2%	4.3%	2.5%	2.5%	2.5%	2.2%
Other	0.1%	0.0%	0.4%	0.0%	0.2%	0.0%	0.1%	0.3%



Hotel Survey: 3rd Quarter 2005

Characteristics of Visitors (Continued)	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
<u>Income</u>								
Under \$25,000	2.0%	1.9%	1.4%	2.9%	1.3%	0.5%	0.9%	0.3%
\$25,000 to \$44,999	4.6%	4.3%	5.3%	4.2%	9.8%	3.4%	2.2%	5.2%
\$45,000 to \$64,999	10.9%	10.5%	13.3%	8.8%	10.5%	8.9%	7.9%	7.9%
\$65,000 to \$100,000	21.9%	23.9%	23.3%	18.5%	27.8%	28.9%	22.6%	21.3%
\$100,000 to \$200,000	37.8%	43.1%	32.4%	37.7%	36.3%	36.3%	38.4%	41.9%
Over \$200,000	22.9%	16.3%	24.3%	28.0%	14.4%	21.9%	27.9%	23.4%
<u>Gender</u>								
Male	56.6%	50.9%	54.2%	65.1%	54.8%	54.3%	57.3%	57.1%
Female	43.4%	49.1%	45.8%	34.9%	45.2%	45.7%	42.7%	42.9%



Hotel Survey: 3rd Quarter 2005

Place of Origin	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
<u>Domestic</u>	90.1% (n=664)	92.1%	91.4%	86.7%	91.3%	90.2%	90.5% (n=666)	92.2% (n=687)
Florida	23.4% (n=172)	31.2%	19.6%	19.4%	20.6%	16.4%	8.4% (n=62)	20.6% (n=153)
Southeast	16.6% (n=122)	16.3%	19.9%	13.6%	17.0%	15.7%	14.3% (n=105)	16.2% (n=121)
Mid Atlantic	13.0% (n=96)	10.3%	13.0%	15.6%	14.9%	13.7%	17.3% (n=128)	12.2% (n=91)
Midwest	12.6% (n=93)	14.7%	13.9%	9.3%	13.6%	17.0%	16.6% (n=122)	16.0% (n=119)
New York	9.9% (n=73)	10.2%	6.6%	12.9%	12.0%	11.7%	15.7% (n=116)	10.5% (n=78)
Far West	7.3% (n=54)	3.3%	8.5%	10.1%	7.1%	7.7%	7.7% (n=57)	8.5% (n=63)
New England	7.2% (n=53)	6.1%	9.8%	5.7%	6.2%	7.9%	10.3% (n=76)	8.1% (n=60)
<u>International</u>	9.9% (n=73)	7.9%	8.6%	13.3%	8.7%	9.8%	9.5% (n=70)	7.8% (n=58)
Europe (net)	4.5% (n=33)	4.2%	2.9%	6.6%	3.1%	5.5%	4.9% (n=36)	4.0% (n=30)
- England/UK	3.2% (n=23)	2.6%	2.0%	5.0%	2.2%	2.7%	2.7% (n=20)	2.3% (n=17)
- Germany	0.4% (n=3)	0.4%	0.0%	0.8%	0.4%	1.2%	0.9% (n=6)	0.5% (n=4)
Latin America / Caribbean	3.1% (n=23)	1.6%	3.3%	4.4%	2.9%	0.9%	1.1% (n=8)	1.1% (n=8)
Canada	1.6% (n=12)	1.7%	2.1%	1.2%	1.8%	2.6%	2.5% (n=19)	2.4% (n=18)
Middle East	0.4% (n=3)	0.4%	0.0%	0.8%	0.2%	0.0%	0.1% (n=1)	0.3% (n=2)
Africa	0.1% (n=1)	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Australia/Asia	0.1% (n=1)	0.0%	0.0%	0.4%	0.7%	0.7%	0.8% (n=6)	0.0% (n=0)



Hotel Survey: 3rd Quarter 2005

Pleasure Vs. Business By Selected Place of Origin	Total 3Q 2005	July	Aug.	Sept.	Total 3Q 2004	Total 4Q 2004	Total 1Q 2005	Total 2Q 2005
Florida	23.4%	31.2%	19.6%	19.4%	20.6%	16.4%	8.4%	20.6%
Business	12.6%	18.4%	10.6%	8.9%	11.8%	13.1%	6.4%	14.6%
Pleasure	10.4%	12.7%	8.6%	10.1%	8.3%	3.2%	2.0%	5.6%
Southeast	16.6%	16.3%	19.9%	13.6%	17.0%	15.7%	14.3%	16.2%
Business	10.9%	9.4%	11.8%	11.3%	8.7%	12.9%	9.4%	11.1%
Pleasure	5.6%	6.6%	8.1%	2.0%	7.9%	2.7%	4.8%	4.8%
Mid Atlantic	13.0%	10.3%	13.0%	15.6%	14.9%	13.7%	17.3%	12.2%
Business	4.9%	4.9%	4.9%	4.8%	6.3%	7.6%	5.8%	4.4%
Pleasure	7.9%	5.3%	8.1%	10.1%	8.5%	5.9%	11.5%	7.4%
Midwest	12.6%	14.7%	13.9%	9.3%	13.6%	17.0%	16.6%	16.0%
Business	6.9%	5.3%	9.4%	6.0%	6.6%	11.8%	7.3%	11.3%
Pleasure	5.7%	9.4%	4.5%	3.2%	6.5%	5.2%	9.1%	4.7%
New York	9.9%	10.2%	6.6%	12.9%	12.0%	11.7%	15.7%	10.5%
Business	3.3%	3.7%	1.6%	4.4%	3.1%	4.8%	4.3%	4.7%
Pleasure	6.6%	6.6%	4.9%	8.5%	8.7%	6.7%	11.3%	5.8%
Far West	7.3%	3.3%	8.5%	10.1%	7.1%	7.7%	7.7%	8.5%
Business	4.6%	2.5%	4.1%	7.3%	3.3%	6.3%	5.7%	6.6%
Pleasure	2.7%	0.8%	4.5%	2.8%	3.9%	1.3%	1.9%	1.9%
New England	7.2%	6.1%	9.8%	5.7%	6.2%	7.9%	10.3%	8.1%
Business	3.5%	3.7%	4.1%	2.8%	2.8%	4.6%	4.2%	3.9%
Pleasure	3.7%	2.5%	5.7%	2.8%	3.3%	3.2%	5.7%	4.2%