



**Report on Palm Beach County Tourism  
Third Quarter 2007  
(July, August and September)**

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Tourist Development Council of Palm Beach County

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# Introduction: 3<sup>rd</sup> Quarter 2007

## Background

- The following report contains information collected during the 3<sup>rd</sup> Quarter of 2007 (July, August and September), fourth quarter of Fiscal Year 2006/2007.
- Results are shown for individual months within the quarter, as well as combined quarterly information for the current quarter and the previous four quarters.



# Property Manager Survey: 3<sup>rd</sup> Quarter 2007

## Occupancy Rates

- **In the third quarter of 2007, the average occupancy rate for Palm Beach County surveyed hotels was 56.0%. This represents a 12.5 percentage point decrease compared to last quarter (68.5%) but is comparable with the same quarter last year (56.9%).**
  - As seen last quarter, in 3Q2007 the average occupancy rate among properties with 101+ rooms (56.8%) continued to be higher than the average occupancy rate among properties with 50-100 rooms (51.6%).
- **Hotels in the Central region of Palm Beach County reported the highest average occupancy rate (59.7%) during 3Q2007, while hotels in the Southern region reported the lowest average occupancy rate (52.7%). The average occupancy rate for hotels in the Northern region was 55.9%.**
  - All regions reported occupancy rates in 3Q2007 comparable to those reported in 3Q2006 (Northern – 55.7%, Central – 61.1% and Southern – 53.5%).
  - All regions reported decreases in occupancy rates compared to last quarter (Northern – 70.3%, a 14.4 percentage point decrease, Central – 70.0%, a 10.3 percentage point decrease and Southern – 66.2%, a 13.5 percentage point decrease).
- **An estimated 763,604 Palm Beach County hotel room nights were occupied\* during the third quarter of 2007 – a decrease of 171,920 room nights compared to last quarter (935,524) and a decrease of 6,025 compared to the third quarter of last year (769,629).**
- **According to hotel managers who reported the percentage of guests from other countries, on average, during 3Q2007, 6.6% of hotel guests were traveling internationally. This represents an increase of 3.2 percentage points compared to last quarter (3.4%) and an increase of 3.8 percentage points compared to 3Q2006 (2.8%).**
  - The percentage of international guests was higher among smaller hotels (50-100 rooms, 17.5%) than among larger hotels (101+ rooms, 5.0%) in 3Q2007.
  - Among larger properties, those with 101-219 rooms claimed that 5.8% of their guests came from abroad, while hotels with 220-500 rooms reported that 2.7% were traveling internationally.
  - Based on the managers who responded, the percentage of international guests was highest in Southern Palm Beach County hotels (12.2%). Property managers in the Northern and Central regions reported that 1.9% and 4.4% of guests, respectively, were international travelers.
- **In 3Q2007, more hotel rooms were occupied by leisure travelers (42.8%) than business (32.9%) or convention/group (24.3%) travelers.**
- **Conference/convention bookings represented 26.6% of occupied room nights at designated convention hotels; a decrease of 8.3 percentage points compared to last quarter (34.9%) and of 3.8 percentage points compared to 3Q2006 (30.4%).**

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



# Property Manager Survey: 3<sup>rd</sup> Quarter 2007

## Average Daily Room Rate (ADR)

- **Surveyed Palm Beach County hotels reported an average daily room rate (ADR) in 3Q2007 of \$110.65; 24.3% (\$35.54) lower than last quarter (\$146.19) but 5.8% (\$6.05) higher than in the third quarter of 2006 (\$104.60).**
  - Smaller properties (50-100 rooms) reported a 3.4% increase in ADR compared to the same quarter last year (from \$94.91 to \$98.11) and an 18.4% decrease compared to last quarter (\$120.28). Larger properties (101+ rooms) reported a 6.5% increase compared to 3Q2006 (from \$106.04 to \$112.91) and a 24.5% decrease compared to last quarter (\$149.60).
  - Among larger properties, hotels with 101-219 rooms reported an ADR of \$86.64 (comparable with 3Q2006, \$85.25), while hotels with 220-500 rooms reported an ADR of \$127.08 (a 16.2% increase from 3Q2006, \$109.37). Hotels with 101-219 rooms and hotels with 220-500 rooms reported decreases in ADR compared to last quarter (by 13.9%, hotels with 101-219 rooms and by 24.1%, hotels with 220-500 rooms).

## Future Business Outlook

- **In 3Q2007, for the following two months, the percentage of surveyed hotel managers expecting an increase (38.7%; 37.5% Group/Individual Business, 12.5% Individual Vacation) and those expecting a decrease (39.5%; 34.8% Group/Individual Business, 38.7% Individual Vacation) in total room revenue were comparable. Twenty-one point eight percent of surveyed managers anticipate no change (27.7% Group/Individual Business, 48.8% Individual Vacation).\***
  - Among hotel managers expecting an increase in room revenue compared to the previous year, the average increase expected is 7.4% (7.4% - Group/Individual Business, 6.5% Individual Vacation).\*
  - Among hotel managers expecting a decrease in room revenue compared to the previous year, the average decrease expected is 12.8% (10.8% - Group/Individual Business, 9.2% Individual Vacation).\*
- **For the following third and fourth months compared to the same months last year, 42.8% of surveyed managers expect an increase in total room revenue (42.2% - Group/Individual Business, 22.2% Individual Vacation), 27.7% expect no change (33.1% - Group/Individual Business, 44.3% Individual Vacation) and 29.5% anticipate a decrease (24.7% - Group/Individual Business, 33.5% Individual Vacation). \***
  - Among hotel managers who predict an increase in room revenue compared to the previous year, the average increase expected is 7.5% (6.2% - Group/Individual Business, 5.9% Individual Vacation).\*
  - Among hotel managers anticipating a decrease in room revenue compared to the previous year, the average decrease expected is 14.1% (11.6% - Group/Individual Business, 9.5% Individual Vacation).\*

## Bookings Via Third Party Websites

- **The percentage of hotel reservations sold through third party websites (such as Orbitz, Travelocity, Expedia, hotels.com, etc) in the third quarter of 2007 (13.3%) was at parity with last quarter (14.0%) and 2.3 percentage points lower than in 3Q2006 (15.6%).**
  - Smaller properties (50-100 rooms) reported a higher percentage of bookings sold via third party websites (25.8%) than larger properties (101+ rooms) (9.3%).

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



# Property Manager Survey: 3<sup>rd</sup> Quarter 2007

## Market Focus

- Regarding marketing, advertising and promotion, most surveyed hotel managers reported that in the third quarter of 2007 their primary focus was on the Florida Drive Market, both leisure (81.8%) and business (63.9%).
- Regarding market areas in need of assistance from the CVB and Sports Commission during 3Q2007, each property manager cited a different need (see full lists on pages 22 and 23).
  - The requests directed to the CVB that were mentioned more than once during the quarter were: 'Bring in any market/All market segments/Find any type of market segment', 'More focus on south county hotels', and 'Establishing a relationship with the Sound Advice Amphitheater for concert events'.
  - The requests directed to the Sports Commission that were cited more than once during the third quarter were: 'Sports events/Any local sporting events/off season and weekends sporting events in area', 'City wide conventions – housing/City wide events' and 'Swim teams/swimming'.



# Hotel Visitor Survey: 3<sup>rd</sup> Quarter 2007

## Characteristics of Stay

- The average party size of surveyed hotel guests in the third quarter of 2007 was 2.1\*; at parity with last quarter (2.1) and 3Q2006 (2.0). The median party size for 3Q2007 and for all months within the quarter was 2.0.
- Surveyed visitors spent, on average, 3.4 nights in a hotel and occupied an average of 1.2 rooms per night\*.

## Planning the Trip to Palm Beach County

- **In 3Q2007, one-half of surveyed visitors reported that they were in Palm Beach County on a business trip (conference/convention/business meeting, 51.1%). Leisure travelers made up 37.5% of surveyed visitors.**
  - Compared to the same time last year, fewer business travelers and more leisure travelers visited Palm Beach County in 3Q2007 (business travelers - decreased from 65.8% in 3Q2006 to 51.1% in 3Q2007, leisure travelers - increased from 24.9% to 37.5%).
  - Compared to last quarter, the percentage of business travelers decreased by 3.1 percentage points (from 54.2% in 2Q2007 to 51.1% in 3Q2007), while the percentage of vacationers remained about the same (38.6% in 2Q2007 and 37.5% in 3Q2007).
- **When asked why they selected PBC over other destinations, 3Q2007 hotel guests most often cited a 'work related trip' (50.7%), followed by 'visit friends/relatives' (21.1%), 'previous visits' (9.8%) and 'beaches' (8.1%).**
  - In line with the decrease in business travel compared to the third quarter of 2006, 'work related trip' as a reason for selecting PBC also decreased (by 12.1 percentage points, 62.8% in 3Q2006 to 50.7% in 3Q2007).
  - Citing of 'work related trip' in 3Q2007 was comparable with last quarter (51.6%).
- According to 46.7% of surveyed guests, employers made the decision about the trip to Palm Beach County; 39.6% reported that the decision was made by the head of the household/other adult.
  - Surveyed visitors were less likely to claim that employers were the decision makers with regard to the trip to PBC in 3Q2007 (46.7%) than in 3Q2006 (61.6%, a 14.9 percentage point decline).
- **Three-in-five surveyed guests (60.0%) planned the trip to Palm Beach County one month or less in advance. This represents a 10.0 percentage point decrease compared to 3Q2006 (70.0%) and a 5.7 percentage point increase from last quarter (54.3%).**

## Booking a Trip to Palm Beach County

- Use of a travel agent to book any part of visitors' trips to PBC decreased in 3Q2007 (21.2%) compared to the same quarter last year (24.7%, down 3.5 percentage points) and last quarter (24.5%, down 3.3 percentage points).
- Conversely, use of the Internet to book any part of visitors' trip to PBC (51.2%) increased compared to the third quarter of last year (48.6%, up 2.6 percentage points) and last quarter (48.8%, up 2.4 percentage points).

\* 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: 3<sup>rd</sup> Quarter 2007

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

- Most surveyed guests who used the Internet to book part of the trip to PBC used it to book hotel rooms (75.6%) and airfares (66.3%). Approximately one-third of surveyed visitors used the Internet to book car rentals (33.6%).
- Use of the Internet to reserve car rentals in 3Q2007 decreased noticeably compared to last year (42.1%, down 8.5 percentage points) and last quarter (40.1%, down 6.5 percentage points).
- Use of the Internet to book hotel rooms (75.6%) increased compared to the third quarter of 2006 (71.5%, a 4.1 percentage point increase) and was comparable to last quarter (73.8%).
- When booking a hotel room online, surveyed visitors most often used hotel websites in 3Q2007 (39.2%). This represents a 3.8 percentage point increase compared to 3Q2006 (35.4%) and is comparable to last quarter (38.2%).
- Three point eight percent of surveyed guests reported that the trip to Palm Beach County was part of a package. This is 1.9 percentage points lower than 3Q2006 (5.7%) and 4.2 percentage points lower than last quarter (8.0%).

## Visitor Expenditures

- **In 3Q2007, the average per party\* expenditure in Palm Beach County was \$1,214 – \$164 (15.6%) more than the average per party expenditure in 3Q2006 (\$1,050) and \$88 (6.8%) less than last quarter (\$1,302).**
  - With the exception of 'Entertainment/Recreation' and 'Local travel', which both remained at parity, all other spending categories experienced increases compared to the third quarter of 2006.
  - Compared to last quarter, there have been decreases in 'Lodging' (from \$681 to \$626, an 8.1% decrease), 'Restaurant/Bar' (from \$360 to \$323, a 10.3% decrease) and 'Entertainment/Recreation' (from \$45 to \$37, a 17.8% decrease).
  - The average per person expenditure in 3Q2007 was \$578, representing a 10.1% increase compared to 3Q2006 (\$525) and a 6.8% decrease compared to last quarter (\$620).
- **The average per party expenditure among vacationers in 3Q2007 was \$1,267 while the average per party expenditure among business travelers was \$1,137.**
  - Vacationers' per party expenditures in 3Q2007 decreased by 13.4% compared to 3Q2006 (\$1,463) and by 19.9% compared to last quarter (\$1,582).
  - On the other hand, business travelers' per party expenditures increased by 28.2% compared to 3Q2006 (\$887) and by 8.0% compared to last quarter (\$1,053).

## Characteristics of Visitors

- **Most Palm Beach County visitors continued to describe themselves as White/Caucasian (92.9%), between the ages of 35 and 54 (55.3%).**
- Most visitors claimed to have professional/managerial jobs (63.7%) and an annual household income of \$100,000 or greater (60.7%).
- The majority of vacationers traveled with 'adult family members and/or friends' (84.2%) when visiting PBC in 3Q2007, while more than half of business travelers were traveling alone (56.0%).

\* 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: 3<sup>rd</sup> Quarter 2007

## Travel Details

- Palm Beach County was the main destination of nine-in-ten surveyed visitors (91.0%). One-quarter were visiting PBC for the first time (25.3%).
- In 3Q2007, there was a decrease in air travel to Palm Beach County (65.1%) compared to 3Q2006 (70.7%, down 5.6 percentage points) and compared to last quarter (72.2%, down 7.1 percentage points). Car travel to PBC (38.9%), however, increased compared to 3Q2006 and 2Q2007 (by 5.8 and 5.5 percentage points, respectively).

## Attitudes toward Palm Beach County

- As seen in the last four quarters, the three most frequently mentioned aspects visitors liked best about PBC were 'climate/weather' (25.9%), 'beaches' (17.7%) and 'beautiful area' (10.1%).
- 'Traffic/bad drivers' (26.7%) and 'humidity/poor weather' (25.1%) were the aspects visitors most often disliked about the trip to PBC in 3Q2007.
- 3Q2007 surveyed visitors reported that a longer stay (22.2%), better weather (11.9%) and coming during vacation time/time off work (8.6%) would make their next trip to PBC better.

## Activity Participation

- When asked about the activities visitors participated in while visiting Palm Beach County, the vast majority reported eating at area restaurants (92.6%).
- Other popular activities mentioned by hotel visitors were shopping (32.8%), going to the beach (29.9%) and swimming (19.4%).

## Return Visits

- Most surveyed guests plan to return to Palm Beach County for a future visit (87.2%). Only 1.4% reported that they will not return; the remainder are uncertain (11.4%).
  - Most of those who plan to visit Palm Beach County in the future, plan to do so in the next year (68.4%); more than one-third of which within the next three months (36.0%).
  - Those who have no plans to return to PBC cited as reasons for not returning: 'no business in the area', 'not enough to do', 'don't like it here' and 'I am going to other places/I like changing destinations'. Thirty eight point two percent did not provide a reason for not returning.





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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: 3<sup>rd</sup> Quarter 2007

	<u>Total 3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>
<b>Occupancy Rate</b>								
Month/Quarter	56.0%	59.8%	58.4%	49.9%	56.9%	64.6%	80.8%	68.5%
FYTD (Oct. - Set.)	67.4%	70.1%	69.0%	67.4%	71.2%	64.6%	72.7%	71.2%
<b>Room Nights Occupied<sup>1*</sup></b>								
Month/Quarter	763,604	274,325	267,903	221,376	769,629	858,302	1,070,734	935,524
FYTD (Oct. - Set.)	3,628,164	3,138,885	3,406,788	3,628,164	3,829,804	858,302	1,929,036	2,864,560
<b>Percentage of Room Nights Occupied</b>								
Leisure	42.8%	42.2%	45.4%	40.8%	39.8%	38.6%	41.5%	35.1%
Business	32.9%	32.1%	30.6%	36.5%	35.3%	36.7%	31.9%	32.9%
Convention/Group	24.3%	25.7%	24.1%	22.7%	24.9%	24.7%	26.6%	31.9%
<b>Average Daily Room Rate<sup>2</sup></b>	\$110.65	\$107.90	\$110.25	\$114.53	\$104.60	\$134.03	\$204.33	\$146.19

+ 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: 3<sup>rd</sup> Quarter 2007

Occupancy Rate Trends by Month, Quarter, and Fiscal Year	<u>99/00</u>	<u>00/01</u>	<u>01/02</u>	<u>02/03</u>	<u>03/04</u>	<u>04/05</u>	<u>05/06</u>	<u>06/07</u>
3rd Quarter (July/August/Sept.)	N/A	N/A	57.3	57.8	64.2	63.0	56.9	56.0
July	63.5	61.6	60.0	60.8	66.9	64.6	62.1	59.8
August	61.2	60.8	59.7	60.5	63.7	62.0	57.0	58.4
September	57.2	43.1	52.0	51.9	61.5	62.9	51.2	49.9
4th Quarter (Oct/Nov/Dec)	N/A	N/A	57.5	59.8	64.2	79.8	73.1	64.6
1st Quarter (Jan/Feb/Mar)	N/A	N/A	76.2	77.9	83.8	88.3	84.7	80.8
2nd Quarter (April/May/June)	N/A	N/A	65.1	67.0	71.8	72.7	71.0	68.5
<b>Fiscal YTD (Oct. – Sept.)</b>	<b>68.8</b>	<b>67.3</b>	<b>64.1</b>	<b>65.7</b>	<b>70.9</b>	<b>76.0</b>	<b>71.2</b>	<b>67.4</b>
<b>Number of Room Nights Occupied in 3<sup>rd</sup> Quarter*</b>							769,629	763,604

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



# Property Manager Survey: 3<sup>rd</sup> Quarter 2007

	<u>Total 3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 2Q 2007</u>	<u>Total 2Q 2007</u>
<b>Conference/Convention Bookings</b>								
<u>All Hotels</u>								
% Occupied Room Nights in County	24.3%	25.7%	24.1%	22.7%	24.9%	24.7%	26.6%	31.9%
Occupied Room Nights in County	185,319	70,502	64,565	50,252	191,074	212,303	284,042	298,110
Occupied Room Nights in County FYTD (Oct.- Sept.)	979,774	864,957	929,522	979,774	1,084,738	212,303	496,345	794,455
<u>Convention Hotels</u>								
% Occupied Room Nights	26.6%	28.7%	26.7%	23.9%	30.4%	31.7%	29.4%	34.9%
Occupied Room Nights	122,959	51,073	41,733	30,153	138,862	163,663	199,451	213,173
Occupied Room Nights FYTD (Oct.- Sept.)	699,246	627,360	669,093	699,246	723,190	163,663	363,114	576,287
<b>Available Inventory*</b>								
Rooms in County	44,384	14,798**	14,798**	14,788**	44,014	43,380	44,219	45,110
Room Nights	1,361,116	458,738	458,738	443,640	1,349,968	1,330,320	1,326,854	1,368,423
Room Nights FYTD (Oct.- Sept.)	5,386,713	4,484,335	4,943,073	5,386,713	5,378,710	1,330,320	2,657,174	4,025,597
<b>Response Rate</b>								
Month/Quarter (for all hotels in County)	60.9%	62.1%	60.8%	59.9%	61.5%	61.8%	62.3%	60.3%
FYTD (Oct.- Sept.)	61.4%	61.6%	61.5%	61.4%	59.1%	61.8%	62.1%	61.5%

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

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



## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

Occupancy Rate	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Size of Hotel</b>								
50 - 100 Rooms	51.6%	54.3%	50.4%	49.4%	52.9%	60.9%	80.5%	62.3%
101 + Rooms	56.8%	60.6%	59.8%	50.0%	57.4%	65.2%	80.8%	69.5%
101-219	56.2%	58.6%	59.7%	50.6%	58.1%	65.5%	81.0%	68.5%
220-500	60.6%	66.2%	62.2%	53.2%	57.9%	65.8%	81.0%	71.2%
All Properties	56.0%	59.8%	58.4%	49.9%	56.9%	64.6%	80.8%	68.5%
<b>Geographic Region</b>								
North	55.9%	61.2%	57.8%	47.8%	55.7%	59.8%	78.1%	70.3%
Central	59.7%	61.6%	62.6%	55.0%	61.1%	65.5%	82.8%	70.0%
South	52.7%	57.4%	54.7%	45.9%	53.5%	65.9%	80.5%	66.2%

What percent of your occupancy is international?	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Size of Hotel</b>								
50-100 Rooms	17.5%	16.8%	14.4%	24.1%	2.5%	4.5%	5.9%	6.2%
101 + Rooms	5.0%	5.4%	4.4%	5.3%	2.7%	2.6%	2.6%	2.8%
101-219	5.8%	4.9%	5.6%	7.1%	3.2%	2.6%	2.3%	2.6%
220-500	2.7%	1.5%*	3.1%	3.5%	0.7%	1.3%	2.4%	1.5%
All Properties	6.6%	6.8%	5.8%	7.2%	2.8%	2.8%	3.0%	3.4%
<b>Geographic Region</b>								
North	1.9%	3.4%*	1.0%	0.7%	1.2%	3.2%	1.8%	3.8%
Central	4.4%	3.1%	4.9%	5.2%	2.3%	2.8%	2.4%	2.1%
South	12.2%	12.5%	10.0%	14.6%	4.3%	2.7%	4.9%	5.0%

\* Caution: Extremely low base



## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

Average Daily Room Rate	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Size of Hotel</b>								
<u>50 - 100 Rooms</u>	\$98.11	\$93.76	\$93.81	\$109.34	\$94.91	\$120.10	\$192.28	\$120.28
<u>101 + Rooms</u>	\$112.91	\$110.61	\$112.84	\$115.61	\$106.04	\$136.06	\$206.22	\$149.60
101-219	\$86.64	\$85.59	\$85.99	\$88.59	\$85.25	\$92.56	\$144.39	\$100.58
220-500	\$127.08	\$121.27	\$130.31	\$130.07	\$109.37	\$134.95	\$208.85	\$167.44
<u>All Properties</u>	\$110.65	\$107.90	\$110.25	\$114.53	\$104.60	\$134.03	\$204.33	\$146.19





## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

Occupied Room Nights *	<u>Occupied Room Nights</u>	<u>% Change</u>
<b>3Q</b>		
2005	862,035+	
2006	769,629	- 10.7
2007	763,604	- 0.8
<b>July</b>		
2005	297,046+	
2006	287,148	- 3.3
2007	274,325	- 4.5
<b>August</b>		
2005	285,090+	
2006	258,547	- 9.3
2007	267,903	3.6
<b>September</b>		
2005	279,899+	
2006	223,934	- 20.0
2007	221,376	- 1.1
<b>4Q</b>		
2005	956,948+	
2006	858,302	- 10.3
2007		
<b>1Q</b>		
2005	1,173,859+	
2006	1,138,435	- 3.0
2007	1,070,734	- 5.9
<b>2Q</b>		
2005	969,020+	
2006	964,792	- 0.4
2007	935,524	- 3.0
<b>FYTD (October – September)</b>		
2005	4,057,276	
2006	3,829,804	- 5.6
2007	3,628,164	- 5.3

+ 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: 3<sup>rd</sup> Quarter 2007

Future Business Outlook (for each month as compared to the same month in previous year)	<u>Total Room Revenue</u>	<u>Group/Indiv. Business Room Revenue</u>	<u>Individual Vacation Room Revenue</u>
<b>August 2007 / September 2007 predictions from July</b>			
<b>Foresee Decrease</b>	46.2%	36.3%	45.1%
Average decrease (among those who foresee decrease)	12.1%	10.0%	8.8%
<b>Foresee No Change</b>	25.8%	24.9%	44.1%
<b>Foresee Increase</b>	28.0%	38.8%	10.8%
Average increase (among those who foresee increase)	5.0%	4.9%	7.3%
<b>September 2007 / October 2007 predictions from August</b>			
<b>Foresee Decrease</b>	28.9%	32.8%	26.7%
Average decrease (among those who foresee decrease)	17.7%	14.8%	14.3%
<b>Foresee No Change</b>	30.3%	33.8%	63.9%
<b>Foresee Increase</b>	40.8%	33.4%	9.4%
Average increase (among those who foresee increase)	8.6%	11.0%	9.4%
<b>October 2007 / November 2007 predictions from September</b>			
<b>Foresee Decrease</b>	42.0%	34.3%	43.5%
Average decrease (among those who foresee decrease)	10.5%	8.2%	6.6%
<b>Foresee No Change</b>	10.6%	25.2%	39.3%
<b>Foresee Increase</b>	47.5%	40.5%	17.2%
Average increase (among those who foresee increase)	8.0%	7.1%	4.1%
<b>Third Quarter predictions from July, August and September</b>			
<b>Foresee Decrease</b>	39.5%	34.8%	38.7%
Average decrease (among those who foresee decrease)	12.8%	10.8%	9.2%
<b>Foresee No Change</b>	21.8%	27.7%	48.8%
<b>Foresee Increase</b>	38.7%	37.5%	12.5%
Average increase (among those who foresee increase)	7.4%	7.4%	6.5%



## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

Future Business Outlook (for each month as compared to the same month in previous year)	<u>Total Room Revenue</u>	<u>Group/Indiv. Business Room Revenue</u>	<u>Individual Vacation Room Revenue</u>
<b>October 2007 / November 2007 predictions from July</b>			
<b>Foresee Decrease</b>	31.4%	28.6%	39.4%
Average decrease (among those who foresee decrease)	14.2%	10.3%	9.4%
<b>Foresee No Change</b>	36.9%	34.3%	45.5%
<b>Foresee Increase</b>	31.8%	37.1%	15.2%
Average increase (among those who foresee increase)	5.3%	5.4%	6.4%
<b>November 2007 / December 2007 predictions from August</b>			
<b>Foresee Decrease</b>	19.9%	21.3%	21.5%
Average decrease (among those who foresee decrease)	19.8%	15.8%	14.2%
<b>Foresee No Change</b>	31.8%	34.2%	53.7%
<b>Foresee Increase</b>	48.3%	44.6%	24.8%
Average increase (among those who foresee increase)	9.5%	8.0%	5.8%
<b>December 2007 / January 2008 predictions from September</b>			
<b>Foresee Decrease</b>	36.4%	22.9%	38.2%
Average decrease (among those who foresee decrease)	11.3%	9.4%	6.6%
<b>Foresee No Change</b>	14.6%	29.9%	33.4%
<b>Foresee Increase</b>	49.0%	47.3%	28.4%
Average increase (among those who foresee increase)	7.3%	5.2%	5.9%
<b>Third Quarter predictions from July, August, September</b>			
<b>Foresee Decrease</b>	29.5%	24.7%	33.5%
Average decrease (among those who foresee decrease)	14.1%	11.6%	9.5%
<b>Foresee No Change</b>	27.7%	33.1%	44.3%
<b>Foresee Increase</b>	42.8%	42.2%	22.2%
Average increase (among those who foresee increase)	7.5%	6.2%	5.9%



## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

Bookings via third party website	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Size of Hotel</b>								
<u>50 - 100 Rooms</u>	25.8%	30.5%	24.4%	18.8%	20.7%	26.4%	22.0%	29.7%
<u>101 + Rooms</u>	9.3%	7.6%	10.9%	9.6%	12.9%	10.7%	8.4%	10.0%
101-219	9.8%	8.4%	11.5%	9.9%	13.9%	11.5%	9.5%	11.1%
220-500	7.7%	3.8%	10.1%	9.3%	9.6%	7.5%	4.5%	6.5%
<u>All Properties</u>	13.3%	13.7%	14.5%	11.2%	15.6%	14.5%	11.3%	14.0%



## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

	<u>Total 3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>
<b>MARKET FOCUS (in terms of marketing, advertising and promotion)</b>								
Florida Leisure Drive Market	81.8%	86.0%	87.9%	71.9%	N/A	N/A	N/A	N/A
Florida Business Drive Market	63.9%	62.6%	74.8%	53.7%	N/A	N/A	N/A	N/A
Florida Association Market	35.4%	36.7%	25.8%	43.2%	N/A	N/A	N/A	N/A
Weddings	51.5%	55.8%	47.8%	49.1%	N/A	N/A	N/A	N/A
Amateur Sports Events	57.5%	49.0%	56.1%	66.8%	N/A	N/A	N/A	N/A
Convention - Northeast	18.0%	7.9%	29.0%	18.0%	N/A	N/A	N/A	N/A
Convention - Mid-Atlantic	13.4%	10.5%	16.9%	13.0%	N/A	N/A	N/A	N/A
Convention - South	15.5%	11.5%	21.0%	14.2%	N/A	N/A	N/A	N/A
Convention - Midwest	10.1%	10.5%	14.5%	5.6%	N/A	N/A	N/A	N/A



## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

Market Areas In Need of Assistance from CVB	Total 3Q2007
Bring in any market/All market segments/Find any type of market segment	3
More focus on south county hotels	3
Establishing a relationship with the Sound Advice Amphitheater for concert events	2
New York, New Jersey, Philadelphia	1
International	1
Tallahassee	1
Calendar schedule months in advance of sales trips, tradeshow, etc.	1
We always encourage group leads be sent to us for review	1
Midwest, Southwest	1
SMERF/SMERF Weekends	1
Northeast	1
Midwest Small Meetings	1
Small groups	1
Weddings	1
Associations	1
Need market with co-op at \$500.00	1
Local Blitzes, State of FL	1
Orlando and NE, Pharmaceutical	1
Over flow rooms for conventions/seminars/ etc. coming into area.	1
City wide events	1
Sports and corporate groups	1
Tour and travel groups	1



## Property Manager Survey: 3<sup>rd</sup> Quarter 2007

Market Areas In Need of Assistance from Sports Commission	Total 3Q2007
Sports events/Any local sporting events/Off season and weekends sporting events in area	2
City-Wide conventions – housing/City wide events	2
Swim Teams/Swimming	2
It seems these RFP's are always toward 2 beds/Quads and low rates - no interest to us - too low to bid	1
Groups (non-specific)	1
Golf	1
Most sports groups looking well below our rates and need 2 bedded rooms - we have so few	1
Amateur Sports Events	1
We always encourage group leads be sent to us for review	1
Golf Tournament Visitors/Spectators	1
Sports Groups	1
I see mostly Northern Palm Beach but not much for the Boca Raton area.	1
Weekend Groups	1
All in South County	1
Lacrosse and field hockey teams. Also include equestrian events	1
All divisions of the sports market. Teams that come in town for college and county wide events	1
Smaller sports groups – spectators, writers, etc	1
Summer and Autumn events/April and November events	1
Scuba Diving Groups	1



# Hotel Visitor Survey





# Methodology

## Hotel Visitor Survey

Each month, approximately 250 self-administered surveys are completed among visitors staying at hotels throughout Palm Beach County. The hotels were selected according to size and geographic location to represent all hotels in the county.

## Survey Changes

In October 2005, the visitors' survey was revised and updated to better address the Tourist Development Council needs in terms of tourist information.

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

Multiple responses are now accepted for the question "Who made the decision to come to PBC?". Also, the responses 'Female head of household', 'Male head of household' and 'Other traveling companion' were merged into 'Head of household/Other Adult', and the response 'Family living in PBC' was added as an option.

- The question "Which of the following influenced your trip to PBC?" (Question 3) was combined with the question "Why did you choose to visit PBC over other destinations?" (Question 5). Due to this change some of the closed-end answers were revised, added or excluded as follows:

- 'Work related trip – did not have a choice in destination' and 'Work related trip – I had a choice in selecting destination' became 'Work related trip'.
- 'Convenient/inexpensive flights' changed to 'Convenient Flights'
- 'Travel Agency recommendation' changed to 'Travel Agency'



# Methodology

## Hotel Visitor Survey

### Survey changes (continued):

- 'Cultural Activities' (Question 3) was merged with 'Arts and Cultural Event' (Question 5).
- 'PBC CVB literature' now reads 'Palm Beach County Convention and Visitors Bureau information/website'.
- 'Hotel brochure' was changed to 'Hotel brochure/website'.
- 'Attractions brochure' changed to 'Attractions brochure/website'.
- 'Saw an advertisement/promotion/article' (Question 3), 'Newspaper or magazine article' (Question 5), 'Newspaper or magazine advertisement' (Question 5) were combined into 'Media Coverage'.
- 'Sporting event (other than Spring Training)' (question 5) was replaced with 'Attend a sporting event'.
- The answer 'Internet information' was replaced with 'other Internet sources'.
- The answers 'Bus Tour' and 'Spanish language media' were added.

- Multiple responses are now accepted for the question "How did you get here?". Also, responses of Bus and Train were added to the list.

- Side trips have been excluded from computation of visitors expenditures (no longer asked on survey).

- In order to obtain a more accurate estimate of lodging expenditures, visitors are now asked directly how much they are paying for their hotel room instead of how much their party spent with lodging per day and in total. The amount spent with lodging per day is then calculated by multiplying room rate x number of rooms rented x 10.5% sales taxes.

- Two new questions were added: "What would make your next visit better?" and "To what extent if at all, might the rising cost of transportation, due to rising fuel costs, influence your decision whether or not to visit Palm Beach County?."



# Methodology

## Hotel Visitor Survey

### Survey changes (continued):

- Changes to the question “Which of the following activities did you enjoy while staying in PBC?” were as follows:

- The closed-end responses swimming, snorkeling, surfing, kite surfing, and ‘visit Downtown at the Gardens’ were added.
- ‘Boating/fishing/diving’ are now presented individually and the answer ‘Other water activities’ was removed from the survey. Data from these two answers collected during October 2004 through September 2005 will be shown in all new related answers for comparison (i.e. prior responses of ‘boating/fishing/diving’ will now count toward the individual responses ‘boating’, ‘fishing’ and ‘diving’).
- The response ‘cruise’ was changed to ‘Gambling cruise’ and ‘Pari-mutuels (racing, jai-alai)’ changed to ‘Pari-mutuels (dog track)’.

- The answer ‘Palm Beach County Convention and Visitors Bureau’ was added to the list of websites visitors might use to book hotel rooms.

-Visitors are now asked if they are of Hispanic origin or descent and the answer ‘Hispanic’ was removed from the ethnic group question.

- Age categories “18 to 24” and “25 to 34” were merged into “Under 35” and categories “35 to 44” and “45 to 54” were combined into “35 to 54”.

- Household income ranges “Under \$25,000” and “\$25,000 to \$44,999” were merged into “Under \$45,000”.

- The household size question is no longer on the survey.



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Characteristics of Stay	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
Average Party Size *	2.1	2.3	2.2	1.9	2.0	2.0	2.1	2.1
Median Party Size	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Nights in County	3.5	3.6	3.2	3.5	3.3	3.5	3.5	3.1
Nights in Hotel	3.4	3.5	3.1	3.5	3.2	3.4	3.3	3.0
Rooms per Night *	1.2	1.2	1.2	1.2	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: 3<sup>rd</sup> Quarter 2007

Visitor Expenditures	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Average Expenditure Per Visit</b>								
Lodging	\$626	\$655	\$577	\$609	\$554	\$714	\$1,053	\$681
Restaurant/Bar	\$323	\$368	\$260	\$354	\$243	\$320	\$353	\$360
Gifts/Shopping	\$102	\$88	\$109	\$105	\$93	\$122	\$96	\$93
Entertainment/Recreation	\$37	\$35	\$34	\$46	\$38	\$65	\$63	\$45
Local Travel	\$126	\$123	\$115	\$130	\$122	\$129	\$142	\$123
Total Per Party	\$1,214	\$1,267	\$1,094	\$1,243	\$1,050	\$1,350	\$1,706	\$1,302
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$578	\$551	\$497	\$654	\$525	\$675	\$812	\$620
Total Per Person/Per Day	\$170	\$157	\$160	\$187	\$164	\$199	\$246	\$207
Lodging	\$88	\$81	\$85	\$92	\$87	\$105	\$152	\$108
Restaurant/Bar	\$45	\$46	\$38	\$53	\$38	\$47	\$51	\$57
Gifts/Shopping	\$14	\$11	\$16	\$16	\$15	\$18	\$14	\$15
Entertainment/Recreation	\$5	\$4	\$5	\$7	\$6	\$10	\$9	\$7
Local Travel	\$18	\$15	\$17	\$19	\$19	\$19	\$20	\$20

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

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



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Visitor Expenditures	Pleasure							
	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Average Expenditure Per Visit</b>								
Lodging	\$647	\$729	\$585	\$597	\$675	\$882	\$1,333	\$816
Restaurant/Bar	\$330	\$337	\$279	\$380	\$328	\$463	\$484	\$403
Gifts/Shopping	\$119	\$126	\$93	\$142	\$234	\$320	\$197	\$158
Entertainment/Recreation	\$46	\$37	\$45	\$59	\$101	\$107	\$82	\$81
Local Travel	\$125	\$152	\$99	\$129	\$125	\$164	\$189	\$126
<b>Total Per Party</b>	<b>\$1,267</b>	<b>\$1,380</b>	<b>\$1,101</b>	<b>\$1,307</b>	<b>\$1,463</b>	<b>\$1,935</b>	<b>\$2,284</b>	<b>\$1,582</b>
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$469	\$460	\$408	\$594	\$542	\$744	\$913	\$586
Total Per Person/Per Day	\$142	\$124	\$136	\$180	\$139	\$182	\$223	\$167
Lodging	\$73	\$66	\$72	\$82	\$64	\$83	\$130	\$86
Restaurant/Bar	\$37	\$30	\$34	\$52	\$31	\$43	\$47	\$43
Gifts/Shopping	\$13	\$11	\$11	\$20	\$22	\$30	\$19	\$17
Entertainment/Recreation	\$5	\$3	\$6	\$8	\$10	\$10	\$8	\$9
Local Travel	\$14	\$14	\$12	\$18	\$12	\$15	\$18	\$13

- 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: 3<sup>rd</sup> Quarter 2007

Visitor Expenditures	Business							
	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2006	Total 2Q 2007
<b>Average Expenditure Per Visit</b>								
Lodging	\$602	\$584	\$587	\$605	\$502	\$648	\$888	\$558
Restaurant/Bar	\$311	\$380	\$251	\$324	\$209	\$270	\$280	\$313
Gifts/Shopping	\$73	\$36	\$119	\$65	\$41	\$62	\$42	\$48
Entertainment/Recreation	\$29	\$30	\$23	\$29	\$17	\$47	\$50	\$20
Local Travel	\$121	\$99	\$135	\$126	\$119	\$115	\$115	\$115
<b>Total Per Party</b>	<b>\$1,137</b>	<b>\$1,129</b>	<b>\$1,115</b>	<b>\$1,148</b>	<b>\$887</b>	<b>\$1,141</b>	<b>\$1,375</b>	<b>\$1,053</b>
<b>Average Expenditure Per Person Per Day (based on average # of persons per party)</b>								
Total Per Person	\$693	\$664	\$656	\$718	\$555	\$634	\$764	\$619
Total Per Person/Per Day	\$199	\$201	\$199	\$199	\$191	\$204	\$273	\$248
Lodging	\$105	\$104	\$105	\$105	\$108	\$116	\$176	\$131
Restaurant/Bar	\$55	\$68	\$45	\$56	\$45	\$48	\$56	\$74
Gifts/Shopping	\$13	\$6	\$21	\$11	\$9	\$11	\$8	\$11
Entertainment/Recreation	\$5	\$5	\$4	\$5	\$4	\$8	\$10	\$5
Local Travel	\$21	\$18	\$24	\$22	\$26	\$21	\$23	\$27

- 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: 3<sup>rd</sup> Quarter 2007

Planning the Trip to Palm Beach County	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Reason for Trip</b>								
Conference/Convention/ Business Meeting	51.1%	51.7%	47.6%	55.5%	65.8%	72.2%	55.1%	54.2%
- Business Meeting	44.4%	43.0%	42.7%	50.4%	59.1%	60.7%	49.1%	47.5%
- Conference/Convention	5.9%	7.8%	4.5%	3.9%	4.8%	10.2%	5.7%	6.2%
- Other Business	0.8%	0.8%	0.4%	1.3%	1.8%	1.3%	0.3%	0.5%
Vacation/Pleasure	37.5%	35.0%	40.8%	38.0%	24.9%	21.5%	34.9%	38.6%
Sporting Event	5.1%	8.2%	2.8%	1.8%	2.4%	3.0%	4.4%	1.8%
Cultural Event/Attraction	0.5%	0.0%	0.8%	0.8%	0.7%	0.4%	0.8%	1.3%
Film/TV location scouting/production	0.5%	0.8%	0.7%	0.0%	0.1%	0.0%	1.4%	0.0%
Other	5.4%	4.4%	7.3%	3.8%	6.0%	3.0%	3.4%	4.0%
<b>Who Made the Decision*</b>								
Employer	46.7%	45.7%	45.8%	48.1%	61.6%	67.0%	54.1%	49.6%
Head of Household/ Other adult	39.6%	38.7%	39.8%	42.2%	32.7%	26.3%	40.5%	41.3%
Family Living in PBC	11.0%	14.3%	9.7%	8.8%	5.7%	6.4%	6.8%	10.1%
Children Influenced Decision	4.7%	3.4%	7.7%	2.4%	1.4%	0.5%	0.8%	1.5%
<b>Advanced Planning</b>								
One Month or Less	60.0%	60.4%	57.5%	66.9%	70.0%	59.9%	52.1%	54.3%
2 to 3 Months	21.1%	20.9%	21.7%	18.2%	16.6%	22.1%	23.2%	21.8%
More than 3 Months	18.9%	18.7%	20.8%	14.8%	13.5%	18.0%	24.7%	23.9%

\* Multiple responses accepted.





## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Planning the Trip to Palm Beach County (Continued)	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Reasons for Selecting Palm Beach County Over Other Destinations*</b>								
Work Related Trip	50.7%	46.9%	48.8%	59.5%	62.8%	68.6%	54.9%	51.6%
Visit Friends/Relatives	21.1%	17.8%	21.3%	24.5%	17.4%	14.2%	19.5%	22.8%
Previous Visit	9.8%	6.6%	15.1%	7.3%	11.1%	9.3%	14.2%	11.9%
Beaches	8.1%	6.7%	9.0%	9.5%	3.0%	2.1%	7.5%	5.4%
Special Event	7.6%	10.7%	5.1%	5.1%	3.9%	5.4%	7.4%	7.5%
Weather	5.9%	3.7%	6.5%	8.1%	3.2%	2.2%	9.3%	6.0%
Convenient Flights	5.4%	4.7%	7.8%	3.9%	5.8%	3.2%	8.9%	5.6%
Friends/Relatives recommendation	3.5%	3.9%	3.8%	2.5%	2.3%	1.4%	3.2%	2.3%
Attend Sporting Event	2.5%	5.1%	0.0%	1.0%	1.6%	1.3%	2.0%	0.7%
Attraction Brochure/Website	2.2%	3.2%	2.1%	1.3%	0.4%	0.5%	0.7%	1.1%
Hotel Brochure/Website	2.1%	2.1%	2.4%	1.9%	0.4%	1.4%	2.2%	1.3%
Golf/Tennis/Recreation	1.8%	3.8%	0.9%	0.0%	1.7%	2.9%	3.3%	2.8%
Compete in Sporting Event	1.2%	1.7%	0.8%	1.1%	0.1%	0.2%	1.4%	1.4%
Other Internet Sources	0.7%	1.3%	0.5%	0.4%	0.6%	0.2%	0.5%	0.3%
Art/Cultural Event	0.5%	0.0%	0.5%	1.0%	1.2%	0.6%	0.9%	1.1%
Media Coverage	0.2%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.1%
Bus Tour	0.1%	0.0%	0.4%	0.0%	0.2%	0.3%	0.2%	0.0%
PBC-CVB Information/Website	0.1%	0.0%	0.0%	0.4%	0.1%	0.0%	0.1%	1.1%
County/State Tourist Agency	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Travel Agency	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.1%
Spanish Language Media	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%
Spring Training	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%
Other	6.3%	6.4%	9.2%	3.1%	4.8%	4.7%	3.0%	6.6%

\* Multiple responses accepted.



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Booking Tools	<u>Total 3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>
<b>Booked Trip with Travel Agency</b>								
Yes	21.2%	17.1%	21.1%	29.0%	24.7%	28.3%	23.7%	24.5%
No	78.8%	82.9%	78.9%	71.0%	75.3%	71.7%	76.3%	75.5%
<b>Booked Any Part of Trip Using Internet</b>								
Yes	51.2%	52.2%	56.5%	44.9%	48.6%	42.3%	44.9%	48.8%
No	48.8%	47.8%	43.5%	55.1%	51.4%	57.7%	55.1%	51.2%
<b>Booked Any Part of Trip Using Internet* (among those who used the Internet)</b>								
Hotel	75.6%	75.4%	75.7%	77.9%	71.5%	65.4%	64.8%	73.8%
Hotel website	39.2%	43.4%	39.4%	32.7%	35.4%	34.8%	28.4%	38.2%
Expedia	4.5%	2.9%	4.9%	4.8%	1.9%	1.6%	2.5%	3.1%
Travelocity	3.4%	1.8%	5.8%	3.3%	4.8%	2.8%	2.2%	4.1%
hotels.com	2.5%	4.1%	2.5%	0.0%	2.2%	2.2%	1.8%	3.1%
Orbitz	1.7%	1.9%	0.8%	3.0%	0.5%	1.1%	1.2%	0.9%
Hotwire	1.2%	0.8%	0.7%	1.5%	0.4%	0.4%	1.3%	1.1%
PBC CVB Website	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Other Website	7.0%	6.2%	7.4%	13.7%	6.3%	4.4%	6.9%	5.5%
Don't Remember	16.3%	15.3%	14.3%	18.8%	20.0%	17.7%	20.4%	17.9%
Air	66.3%	61.8%	65.8%	75.6%	64.7%	71.6%	76.1%	62.4%
Car Rental	33.6%	29.1%	34.0%	45.0%	42.1%	40.8%	41.7%	40.1%
Tickets to Event	1.5%	0.7%	0.8%	3.0%	1.7%	0.8%	0.5%	2.3%
Other	0.9%	1.0%	0.7%	0.8%	4.5%	2.9%	4.4%	1.8%
<b>Visit was Part of Package (that may have included airfare, lodging, meals, rental car, etc.)</b>								
Yes	3.8%	2.6%	4.0%	4.7%	5.7%	7.7%	7.2%	8.0%
No	96.2%	97.4%	96.0%	95.3%	94.3%	92.3%	92.8%	92.0%

\* Multiple responses accepted.



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Activity Participation	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Participation in Specific Activities*</b>								
Restaurants	92.6%	91.4%	93.5%	94.2%	92.5%	94.1%	93.4%	93.7%
Shopping	32.8%	37.2%	28.6%	31.6%	28.3%	25.9%	33.1%	32.1%
Went to Beach	29.9%	28.9%	32.7%	29.5%	24.1%	17.3%	26.7%	31.8%
Swimming	19.4%	17.7%	22.2%	17.5%	13.6%	9.9%	13.2%	18.0%
Bars/Nightclubs	12.4%	11.3%	12.9%	16.0%	8.6%	10.1%	14.0%	10.9%
Visited downtown West Palm Beach Attractions/City Place	8.8%	10.9%	9.0%	6.3%	8.3%	10.9%	11.5%	11.5%
Golf, Tennis	7.1%	10.5%	6.4%	5.1%	6.5%	9.1%	11.8%	9.1%
Visited Downtown Delray Beach Attractions	4.5%	3.9%	4.0%	6.0%	4.5%	5.8%	7.7%	3.3%
Visited Mizner Park/Boca Raton	4.0%	2.7%	5.2%	4.5%	2.9%	4.3%	4.5%	5.1%
Visited Wildlife Refuge	2.6%	2.8%	3.0%	1.5%	1.5%	2.1%	2.9%	2.5%
Boating	2.0%	2.8%	0.9%	2.3%	1.1%	0.9%	1.9%	2.6%
Snorkeling	1.9%	1.8%	2.6%	1.1%	0.6%	0.3%	0.3%	1.3%
Visited Downtown at the Gardens	1.8%	0.9%	3.0%	1.7%	0.4%	1.8%	1.6%	2.1%
Fishing	1.7%	2.3%	2.3%	0.6%	0.5%	1.6%	1.5%	1.3%
Attractions	1.6%	1.9%	1.3%	1.6%	0.7%	0.6%	2.3%	2.1%
Museums, Art Galleries	1.4%	1.3%	1.4%	1.5%	1.4%	0.7%	4.3%	2.0%
Performing Arts (plays, concerts, dance)	1.4%	0.0%	1.7%	2.3%	0.7%	2.2%	0.9%	1.5%
Attended a Sporting Event	1.3%	0.9%	1.4%	1.2%	1.0%	1.0%	4.4%	1.3%
Gambling Cruise	1.3%	1.8%	0.9%	1.4%	0.5%	0.4%	0.3%	1.1%
Visited Palm Beach/Worth Avenue**	1.0%	N/A	0.4%	2.8%	N/A	N/A	N/A	N/A
Visited Riviera Beach/Singer Island	0.9%	1.3%	0.8%	0.6%	0.7%	1.0%	1.0%	0.7%
Visited downtown Lake Worth	0.7%	0.9%	0.9%	0.6%	0.3%	1.2%	1.6%	0.6%
Competed in Sports Event	0.6%	0.9%	0.4%	0.4%	0.3%	0.3%	0.6%	0.8%
Diving	0.6%	0.4%	0.4%	1.1%	0.3%	0.2%	0.3%	0.6%
Pari-mutuels (dog-track)	0.2%	0.0%	0.4%	0.3%	0.7%	0.1%	0.3%	0.2%
Palm Beach County Convention Center	0.1%	0.0%	0.0%	0.4%	0.0%	0.1%	0.3%	0.9%
Surfing	0.1%	0.5%	0.0%	0.0%	0.4%	0.1%	0.4%	0.1%
Kite Surfing	0.1%	0.4%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Other	6.3%	6.8%	6.6%	4.3%	5.2%	7.6%	5.5%	5.7%

\*Multiple responses accepted.

\*\* Added in August 2007



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Return Visits	<u>Total</u> <u>3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total</u> <u>3Q 2006</u>	<u>Total</u> <u>4Q 2006</u>	<u>Total</u> <u>1Q 2007</u>	<u>Total</u> <u>2Q 2007</u>
<b><u>Plan to Return to PBC</u></b>								
Yes	87.2%	83.1%	87.9%	88.9%	83.9%	82.7%	84.5%	83.8%
No	1.4%	0.4%	1.7%	1.5%	2.3%	3.7%	2.5%	2.6%
Don't know	11.4%	16.5%	10.4%	9.6%	13.8%	13.6%	13.0%	13.6%
<b><u>If no, why not?*</u></b> (Top mentions – 5% or higher)								
	n = 10	n = 1**	n = 4**	n = 4**	n = 17	n = 27	n = 19	n = 19
No business in the area	28.9%	0	1	2	25.1%	11.1%	20.0%	16.3%
Not enough to do	13.9%	1	0	0	0.0%	0.0%	0.0%	0.0%
Don't like it here	10.0%	0	0	1	0.0%	0.0%	4.5%	5.2%
I am going to other places/ like changing destinations	9.0%	0	0	1	0.0%	0.0%	0.0%	15.9%
Too expensive	0.0%	0	0	0	6.6%	8.3%	0.0%	14.9%
Moving away/To another country	0.0%	0	0	0	0.0%	0.0%	9.3%	5.3%
No interest	0.0%	0	0	0	5.0%	0.0%	0.0%	5.2%
Too crowded	0.0%	0	0	0	0.0%	0.0%	0.0%	5.2%
Too far	0.0%	0	0	0	0.0%	15.3%	6.1%	0.0%
Not ideal location	0.0%	0	0	0	0.0%	0.0%	6.1%	0.0%
Time Restraints	0.0%	0	0	0	0.0%	0.0%	6.1%	0.0%
Family moving away	0.0%	0	0	0	0.0%	7.1%	0.0%	0.0%
Job hunting	0.0%	0	0	0	7.3%	4.1%	0.0%	0.0%
Probate office people are rude	0.0%	0	0	0	7.3%	0.0%	0.0%	0.0%
Did not like Singer Island	0.0%	0	0	0	6.6%	0.0%	0.0%	0.0%
No fun	0.0%	0	0	0	6.5%	0.0%	0.0%	0.0%
No reason/No answer	38.2%	0	3	0	31.3%	30.2%	38.5%	32.0%
<b><u>When do you plan on returning to PBC?</u></b>								
Within the next 3 months	36.0%	32.6%	38.8%	35.0%	42.2%	39.7%	29.7%	34.4%
Within the next 6 months	11.2%	12.7%	12.0%	8.4%	12.0%	12.1%	10.3%	12.3%
Within the next year	21.2%	24.5%	20.4%	17.2%	16.2%	19.0%	29.7%	26.1%
Within the next few years	4.6%	3.8%	3.7%	5.6%	4.2%	4.3%	6.1%	5.0%
Don't Know	27.1%	26.5%	25.1%	33.8%	25.4%	24.9%	24.2%	22.1%

\*Multiple responses accepted.

\*\* Raw numbers shown due to low base size



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Travel Details	Total <u>3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	Total <u>3Q 2006</u>	Total <u>4Q 2006</u>	Total <u>1Q 2007</u>	Total <u>2Q 2007</u>
<b><u>Main Destination</u></b>								
Palm Beach County	91.0%	90.0%	89.7%	94.1%	92.8%	92.2%	89.0%	87.4%
<b><u>First Trip to PBC</u></b>	25.3%	27.4%	26.0%	27.6%	26.7%	25.4%	19.8%	24.3%
<b><u>Type of Transportation*</u></b>								
Airplane	65.1%	61.1%	62.0%	75.3%	70.7%	74.1%	80.2%	72.2%
Car	38.9%	43.4%	40.7%	30.0%	33.1%	30.6%	24.5%	33.4%
Other	0.4%	0.8%	0.4%	0.0%	0.6%	0.7%	1.3%	0.7%

\*Multiple responses accepted.



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Attitudes about Trip to Palm Beach County	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Things Liked Best – Top Mentions</b>								
Climate/Weather	25.9%	22.1%	27.3%	29.4%	25.3%	42.0%	48.9%	36.9%
Beaches/Ocean	17.7%	18.1%	19.7%	13.5%	18.7%	9.5%	10.8%	13.5%
Beautiful Area/Nice Place	10.1%	12.1%	10.8%	9.6%	8.5%	7.5%	6.8%	8.4%
Nice People	5.9%	6.0%	6.5%	4.4%	4.7%	4.9%	4.0%	4.5%
Visiting Friends/Friends	4.2%	3.7%	5.0%	4.3%	4.2%	3.7%	2.9%	5.0%
Hotel	3.9%	4.7%	2.7%	3.7%	4.1%	2.7%	1.9%	3.6%
Cleanliness	3.7%	2.7%	6.1%	2.4%	4.6%	4.6%	2.4%	4.5%
Relaxing Atmosphere	3.0%	4.0%	1.7%	3.1%	3.5%	2.3%	3.6%	2.6%
Restaurant	2.8%	3.8%	1.1%	2.7%	2.9%	2.2%	2.6%	2.2%
Palm Trees	2.7%	3.7%	3.2%	1.0%	1.6%	1.9%	0.6%	1.8%
Shopping	2.5%	1.6%	2.1%	3.9%	1.8%	2.8%	1.5%	1.5%
Location	1.8%	2.6%	1.1%	1.8%	1.9%	1.9%	0.7%	1.8%
Everything	1.6%	1.0%	1.0%	2.7%	1.4%	1.3%	1.9%	3.0%
City Place	1.5%	1.1%	1.1%	2.0%	1.4%	1.5%	1.1%	1.2%
Golf	1.2%	2.1%	1.1%	0.0%	1.8%	2.7%	3.3%	1.4%
Easy driving/Easy to get around	1.6%	1.1%	1.1%	5.7%	1.9%	1.1%	0.1%	0.9%
Other	10.5%	9.6%	8.4%	9.8%	11.7%	7.4%	6.9%	7.2%



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Attitudes about Trip to Palm Beach County	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Things Liked Least – Top Mentions</b>								
Traffic/Bad Drivers	26.7%	22.6%	26.8%	29.5%	30.6%	36.8%	41.6%	33.4%
Humidity/Poor Weather	25.1%	32.7%	20.9%	18.4%	28.3%	14.9%	9.6%	15.3%
Expensive	6.1%	2.8%	11.5%	10.6%	3.7%	3.0%	5.8%	6.8%
Road Construction	5.3%	6.6%	1.8%	5.7%	4.4%	4.1%	2.8%	3.7%
Bad neighborhoods/crime	3.2%	2.9%	4.3%	2.2%	1.2%	1.7%	0.0%	1.0%
Stay Was Too Short	2.2%	3.2%	1.0%	3.0%	2.7%	2.2%	1.6%	1.6%
Hotel (general)	2.1%	2.3%	0.9%	3.2%	2.3%	2.2%	1.6%	2.8%
Lack of directional signs	2.0%	1.5%	2.6%	1.5%	0.5%	0.9%	0.3%	0.0%
Lack of Entertainment/ Shopping in PM	1.6%	0.7%	3.4%	0.6%	0.3%	0.2%	1.3%	1.0%
Bugs/Lizards	1.5%	0.9%	1.8%	2.0%	1.2%	0.3%	0.6%	2.1%
Crowded	1.0%	0.6%	1.9%	0.0%	1.7%	1.5%	3.6%	3.4%
Far away	0.8%	2.2%	0.0%	0.0%	0.6%	0.2%	0.0%	1.4%
Cost of Hotel	0.3%	0.7%	0.0%	0.0%	0.2%	0.7%	2.2%	0.6%
Other	13.5%	14.1%	14.1%	11.2%	14.8%	17.2%	17.8%	18.7%
<u>Nothing liked least</u>	8.6%	6.2%	9.0%	12.1%	7.5%	14.1%	11.2%	8.2%



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Attitudes about Trip to Palm Beach County	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Suggestions for Improvement - Top Mentions*</b>								
Longer stay	22.2%	22.1%	21.7%	22.7%	28.8%	15.6%	22.3%	20.3%
Better weather	11.9%	11.3%	14.5%	8.6%	11.8%	8.1%	13.7%	11.1%
Come during vacation time	8.6%	6.9%	7.0%	10.1%	7.9%	12.5%	6.9%	2.3%
Improve traffic/Finish Construction on I-95	6.0%	8.8%	4.8%	4.8%	7.2%	9.4%	7.1%	7.8%
Less business and more partying/more free time	4.8%	4.9%	3.5%	6.2%	6.9%	13.2%	3.0%	10.7%
Come with friends/family	3.5%	0.0%	4.7%	4.6%	3.6%	5.5%	6.2%	3.2%
Cheaper hotel room	3.1%	3.9%	3.7%	1.0%	1.1%	1.2%	2.9%	3.3%
Better transportation/transportation options	2.4%	0.0%	3.5%	3.6%	0.5%	1.5%	0.8%	1.4%
Better hotel	2.0%	2.5%	3.7%	0.0%	3.6%	2.2%	4.1%	3.7%
Lower prices	2.0%	2.3%	3.3%	0.0%	2.5%	1.8%	2.9%	2.4%
Better tourist information	1.4%	4.1%	0.0%	0.0%	0.4%	1.1%	0.0%	0.0%
Play golf	1.4%	0.0%	2.4%	10.7%	0.9%	1.1%	0.9%	1.9%
Go to the beach	1.4%	0.0%	3.3%	0.0%	1.3%	0.3%	0.3%	0.5%
Nothing	4.5%	5.4%	4.8%	3.3%	6.5%	8.3%	7.6%	7.9%
Other	27.4%	28.1%	22.8%	27.7%	18.7%	19.0%	22.2%	24.0%

\*Multiple responses accepted.





## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Characteristics of Visitors	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b>Age</b>								
Under 35	20.5%	20.4%	19.0%	20.4%	18.8%	19.4%	15.6%	16.1%
35 to 54	55.3%	55.1%	53.2%	60.9%	58.8%	52.9%	51.6%	55.0%
55 to 64	18.7%	18.0%	22.0%	15.0%	16.1%	22.0%	21.8%	21.1%
65 +	5.5%	6.5%	5.8%	3.6%	6.3%	5.7%	11.0%	7.8%
<b>Occupation</b>								
Professional/Managerial	63.7%	67.9%	57.1%	66.4%	63.1%	63.5%	63.5%	63.7%
Sales	13.5%	11.1%	16.7%	11.2%	16.1%	14.6%	14.7%	16.5%
Retired	7.7%	7.7%	8.8%	6.6%	7.6%	6.3%	10.8%	9.3%
Technical	7.4%	5.1%	8.5%	8.1%	8.1%	10.0%	5.8%	5.3%
Student	2.0%	1.9%	2.5%	4.0%	0.9%	0.8%	1.0%	0.6%
Other	6.1%	6.4%	6.4%	3.8%	4.1%	4.9%	4.1%	4.7%
<b>Hispanic Origin</b>	6.6%	4.2%	10.5%	4.7%	7.0%	5.0%	4.0%	5.7%
<b>Ethnicity</b>								
White/Caucasian	92.9%	91.2%	95.2%	92.4%	90.4%	90.5%	92.9%	91.4%
African-American/Black	5.3%	7.1%	3.9%	5.2%	5.7%	5.3%	5.2%	5.9%
Asian	1.5%	1.4%	0.9%	1.9%	3.8%	3.5%	1.8%	2.8%
Other	0.3%	0.4%	0.0%	0.5%	0.1%	0.7%	0.2%	0.0%



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Characteristics of Visitors (Continued)	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b><u>Income</u></b>								
Under \$45,000	5.6%	5.9%	4.4%	6.1%	5.3%	4.3%	4.5%	5.5%
\$45,000 to \$64,999	9.9%	8.8%	9.9%	11.0%	11.9%	9.4%	6.2%	9.8%
\$65,000 to \$99,999	23.8%	24.3%	27.9%	22.0%	26.4%	21.2%	21.9%	19.2%
\$100,000 to \$200,000	41.3%	41.0%	40.1%	40.2%	41.3%	42.2%	39.8%	42.3%
Over \$200,000	19.4%	20.0%	17.7%	20.6%	15.1%	23.0%	27.5%	23.2%
<b><u>Description of Travel Party*</u></b>								
Adult family members or friends	46.9%	47.9%	48.9%	43.2%	33.7%	29.6%	41.6%	44.9%
Self Only	34.7%	31.0%	34.9%	38.1%	40.1%	37.3%	31.6%	30.8%
Business Associates	16.7%	17.5%	15.3%	18.5%	24.6%	32.5%	26.5%	23.1%
Children <12 years of age	10.1%	14.3%	9.5%	4.1%	6.9%	4.6%	7.7%	8.7%
Grandchildren <12 years of age	0.4%	1.1%	0.0%	0.0%	0.3%	0.1%	0.2%	0.5%
<b><u>Gender</u></b>								
Male	59.2%	59.6%	60.0%	58.6%	60.6%	59.7%	56.3%	59.7%
Female	40.8%	40.4%	40.0%	41.4%	39.4%	40.3%	43.7%	40.3%

\*Multiple responses accepted.



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

<u>Description of Travel Party*</u>	Pleasure Hotel Guests							
	<u>Total 3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>
Adult family members or friends	84.2%	85.7%	82.2%	80.3%	82.9%	77.6%	83.7%	83.8%
Children under 12 years of age	19.7%	30.6%	16.0%	8.0%	20.2%	9.8%	15.8%	16.2%
Self Only	9.8%	5.0%	12.0%	17.9%	11.2%	16.6%	11.4%	9.2%
Business Associates	2.1%	1.0%	4.1%	0.0%	1.0%	4.8%	4.0%	3.7%
Grandchildren under 12 years of age	0.9%	2.5%	0.0%	0.0%	0.9%	0.4%	0.6%	1.0%

<u>Description of Travel Party*</u>	Business Hotel Guests							
	<u>Total 3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>
Self Only	56.0%	51.6%	58.7%	52.2%	53.6%	44.6%	47.2%	47.7%
Business Associates	30.1%	30.9%	27.5%	33.0%	35.9%	42.8%	43.2%	38.9%
Adult family members or friends	14.2%	17.5%	13.8%	15.7%	10.5%	12.1%	9.7%	13.7%
Children under 12 years of age	1.9%	1.6%	2.7%	1.3%	0.6%	2.6%	1.4%	2.8%
Grandchildren under 12 years of age	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Place of Origin	Total 3Q 2007	July	Aug.	Sept.	Total 3Q 2006	Total 4Q 2006	Total 1Q 2007	Total 2Q 2007
<b><u>Domestic</u></b>	<b>91.3%</b> <b>(n=674)</b>	<b>91.3%</b>	<b>91.2%</b>	<b>93.5%</b>	<b>91.9%</b> <b>(n=673)</b>	<b>92.5%</b> <b>(n=677)</b>	<b>91.2%</b> <b>(n=664)</b>	<b>90.9%</b> <b>(n=667)</b>
Florida	30.7% (n=227)	33.3%	32.2%	23.1%	26.7% (n=195)	24.8% (n=182)	16.4% (n=120)	24.4% (n=179)
Southeast	16.2% (n=120)	19.0%	14.5%	17.5%	20.1% (n=147)	14.9% (n=109)	17.6% (n=128)	16.0% (n=118)
Mid Atlantic	13.5% (n=100)	14.8%	14.1%	11.4%	11.2% (n=82)	12.1% (n=89)	15.2% (n=111)	14.3% (n=105)
Midwest	12.4% (n=91)	9.9%	12.3%	17.2%	14.2% (n=104)	18.0% (n=131)	16.9% (n=123)	12.4% (n=91)
New York	7.8% (n=57)	4.8%	8.6%	11.7%	7.0% (n=51)	8.3% (n=61)	9.4% (n=69)	9.3% (n=69)
New England	5.5% (n=41)	3.8%	5.3%	7.7%	4.1% (n=30)	6.6% (n=49)	9.2% (n=67)	6.9% (n=51)
Far West	5.2% (n=38)	5.7%	4.1%	4.9%	8.6% (n=63)	7.7% (n=56)	6.6% (n=48)	7.6% (n=56)
<b><u>International</u></b>	<b>8.7%</b> <b>(n=64)</b>	<b>8.7%</b>	<b>8.8%</b>	<b>6.5%</b>	<b>8.1%</b> <b>(n=59)</b>	<b>7.5%</b> <b>(n=55)</b>	<b>8.8%</b> <b>(n=64)</b>	<b>9.1%</b> <b>(n=67)</b>
Latin America / Caribbean	3.5% (n=26)	2.3%	4.3%	2.8%	1.8% (n=13)	1.8% (n=13)	1.9% (n=14)	2.0% (n=15)
Europe (net)	3.0% (n=22)	4.3%	1.7%	2.8%	3.8% (n=28)	3.7% (n=27)	3.7% (n=27)	4.6% (n=34)
- England/UK	1.0% (n=7)	1.2%	0.0%	1.6%	1.7% (n=12)	1.9% (n=14)	1.6% (n=12)	1.8% (n=13)
- Germany	0.1% (n=1)	0.4%	0.0%	0.0%	0.3% (n=2)	0.5% (n=3)	1.0% (n=7)	0.4% (n=3)
Canada	1.0% (n=8)	0.4%	2.0%	0.6%	1.9% (n=14)	1.0% (n=7)	2.7% (n=20)	1.4% (n=10)
Australia/Asia	0.8% (n=6)	0.9%	0.8%	0.3%	0.6% (n=4)	0.7% (n=5)	0.4% (n=3)	0.6% (n=5)
Africa	0.0% (n=0)	0.0%	0.0%	0.0%	0.0% (n=0)	0.0% (n=0)	0.0% (n=0)	0.4% (n=3)
Middle East	0.3% (n=2)	0.7%	0.0%	0.0%	0.1% (n=1)	0.3% (n=2)	0.0% (n=0)	0.0% (n=0)



## Hotel Survey: 3<sup>rd</sup> Quarter 2007

Pleasure Vs. Business By Selected Place of Origin	<u>Total 3Q 2007</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Total 3Q 2006</u>	<u>Total 4Q 2006</u>	<u>Total 1Q 2007</u>	<u>Total 2Q 2007</u>
<b><u>Florida</u></b>	<b>30.7%</b>	<b>33.3%</b>	<b>32.2%</b>	<b>23.1%</b>	<b>26.7%</b>	<b>24.8%</b>	<b>16.4%</b>	<b>24.4%</b>
Business	18.8%	20.9%	18.0%	15.1%	18.6%	20.0%	10.2%	13.6%
Pleasure	11.2%	11.6%	13.9%	7.3%	7.7%	4.8%	6.0%	10.3%
<b><u>Southeast</u></b>	<b>16.2%</b>	<b>19.0%</b>	<b>14.5%</b>	<b>17.5%</b>	<b>20.1%</b>	<b>14.9%</b>	<b>17.6%</b>	<b>16.0%</b>
Business	10.2%	12.0%	9.0%	12.2%	14.9%	12.2%	12.1%	10.8%
Pleasure	6.1%	6.8%	5.3%	5.3%	5.1%	2.6%	5.1%	5.3%
<b><u>Mid Atlantic</u></b>	<b>13.5%</b>	<b>14.8%</b>	<b>14.1%</b>	<b>11.4%</b>	<b>11.2%</b>	<b>12.1%</b>	<b>15.2%</b>	<b>14.3%</b>
Business	5.0%	6.4%	2.9%	5.7%	6.1%	8.1%	7.1%	6.1%
Pleasure	8.4%	8.0%	11.4%	5.7%	4.5%	3.7%	7.6%	8.0%
<b><u>Midwest</u></b>	<b>12.4%</b>	<b>9.9%</b>	<b>12.3%</b>	<b>17.2%</b>	<b>14.2%</b>	<b>18.0%</b>	<b>16.9%</b>	<b>12.4%</b>
Business	6.1%	3.2%	6.1%	8.2%	10.1%	13.7%	9.6%	7.5%
Pleasure	6.4%	6.4%	6.5%	9.4%	4.1%	4.2%	6.9%	4.8%
<b><u>New York</u></b>	<b>7.8%</b>	<b>4.8%</b>	<b>8.6%</b>	<b>11.7%</b>	<b>7.0%</b>	<b>8.3%</b>	<b>9.4%</b>	<b>9.3%</b>
Business	2.4%	2.0%	2.0%	5.7%	2.3%	4.4%	3.6%	3.1%
Pleasure	5.3%	2.8%	6.5%	5.7%	4.2%	3.8%	5.8%	6.1%
<b><u>New England</u></b>	<b>5.5%</b>	<b>3.8%</b>	<b>5.3%</b>	<b>7.7%</b>	<b>4.1%</b>	<b>6.6%</b>	<b>9.2%</b>	<b>6.9%</b>
Business	2.8%	1.6%	3.7%	2.9%	2.9%	4.0%	4.7%	3.1%
Pleasure	2.6%	2.0%	1.6%	4.5%	1.0%	2.6%	4.5%	3.7%
<b><u>Far West</u></b>	<b>5.2%</b>	<b>5.7%</b>	<b>4.1%</b>	<b>4.9%</b>	<b>8.6%</b>	<b>7.7%</b>	<b>6.6%</b>	<b>7.6%</b>
Business	1.4%	1.6%	1.2%	1.2%	6.7%	5.9%	4.1%	5.0%
Pleasure	3.8%	3.6%	2.9%	3.7%	1.5%	1.6%	2.5%	2.5%