



**Report on Palm Beach County Tourism  
Fiscal Year 2007/2008  
(October 2007 – September 2008)**

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**Table 1  
SUMMARY OF RESEARCH STATISTICS  
FISCAL YEAR 2003/04 THROUGH FISCAL YEAR 2007/08**

	2003/04	2004/05	2005/06	2006/07	2007/08	FY 07/08 CHANGE	5 YEAR AVERAGE
Estimated Hotel Guests	2,236,415*	2,150,112*	2,238,230*	2,354,297*	2,083,936*	- 270,361	2,212,598
Visitor/Guest Multiplier <sup>1</sup>	2	2	2	2	2	N/A	2
Estimated Number of Visitors	4,472,830*	4,300,224*	4,476,460*	4,708,594*	4,167,872*	- 540,722	4,425,196
Estimated Hotel Guest Expenditures (In Millions)	\$1,400	\$1,647	\$1,659	\$1,566	\$1,528	- 38	\$1,560
Money Spent Per Hotel Guest	\$626	\$766	\$741	\$665	\$733	68	\$706
Bed Tax Collections (Gross) <sup>4</sup>	\$19,847,081	\$22,511,343	\$23,515,547	\$26,818,069	\$27,813,718	995,649	\$24,101,152
Occupancy Rate	70.9%	76.0%	71.2%	67.4%	65.2%	- 2.2	70.1%
Average Daily Room Rate <sup>2</sup>	\$130.09	\$148.86	\$147.16	\$148.24	\$164.07	15.83	\$148
Available Room Night Inventory	5,641,246*	5,352,902**	5,378,710*	5,386,713*	5,373,706*	- 13,007	5,426,655
Occupied Room Nights(FYTD) <sup>3</sup>	4,003,012*	4,057,276**	3,829,804*	3,628,164*	3,499,289*	- 128,875	3,803,509
Average Party Size	2.1**	2.1**	2.1**	2.1**	2.0**	- 0.1	2.1
Nights in Hotel/Motel	3.8	4.0	3.6	3.3	3.4	0.1	3.6

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

1. The TDC estimates that the total number of visitors to Palm Beach County is two times the number of hotel guests. This estimation ratio has been in use since 1995/96.

\*\*Starting in fiscal year 2001/02, if 'party size' is greater than 8 or 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is deleted.

+ During FY 2004-05 room nights unavailable due to hurricane/renovation closures were excluded.

2. ADR = Average rate per occupied room.

3. Room nights occupied = ((# total rooms\*occupancy) \* annual room nights)

4. In December 2006 the bed tax increased from 4% to 5%. This increase supports the Convention Center and is not part of the general budget.



# Introduction: Fiscal Year 2008

## Introduction

- Profile Marketing Research was awarded the Palm Beach County Tourist Development Council's Tourism Study for Fiscal Year 2007/2008.
- The following report summarizes information collected monthly from participating hotel property managers (**Property Manager Survey**) and from hotel guests of selected properties throughout Palm Beach County (**Hotel Visitor Survey**) between October 2007 and September 2008.
- The Fiscal Year 2007/2008 Report on Tourism summarizes and charts key trends in hotel property statistics and visitor information over the last six fiscal years, and is based on data collected from two studies.
  - The **Property Manager Survey** is a survey of Palm Beach County Hotel Managers, where they are asked each month to provide the following information about their property; the occupancy rate, average daily room rate, revenue per available room, and the percentage of room nights from group, individual business and individual vacation travel. In addition, they are asked to provide a forecast (percent increase or decrease) of the expected room revenue for the following month. This survey is provided each month to participating property managers representing hotels throughout Palm Beach County. Approximately 50 property managers respond every month.
  - The **Hotel Visitor Survey** is administered to hotel guests staying overnight in Palm Beach County hotels as they are checking out. This survey collects self-administered information including party size, number of hotel nights staying in the county, number of hotel rooms per night, purpose of the visit, expenditures, participation in area activities, place of origin, and demographics. In addition, hotel guests are asked what they liked most and least about their visit to Palm Beach County. The Hotel Visitor Survey is conducted from 250 hotel guests monthly (258 in April 2008), staying in select and varied hotels representing the three Palm Beach County regions for an annual sample of 3008. This provides an error interval of no greater than + or - 1.79% at the 95% level of confidence.
- Results are shown for Fiscal Year 2007/2008 and comparisons are made to data as reported in prior years.
- The following report is divided into three sections. The first section is a **SUMMARY** based on analysis of data gathered over the last six fiscal years. The second and third presents detailed statistical information gathered from the **Property Manager Survey** and the **Hotel Visitor Survey**.
- Note, estimated number of hotel guests is based on a calculation using available room night inventory, occupancy rate, hotel nights, and party size.



# Summary Fiscal Year in Review



# Fiscal Year 2008 Summary

## Occupancy Rates

- In FY 2007/08, the average occupancy rate among responding Palm Beach County hotel managers decreased by 2.2 percentage points relative to the prior fiscal year (from 67.4% in FY 2006/07 to 65.2% in FY 2007/08). (table 1, pg. 4)
  - As seen in prior years, the average occupancy rates were highest in February and March (both 81.8%) and lowest in September (46.2%). (table 11, pg. 26)
- Managers of hotels in the Central region reported the highest average occupancy rate in FY 2007/08 at 66.8%, compared to 64.3% cited by hotel managers in the Southern region and 63.9% among hotel managers in the Northern region. (table 5, pg. 20)
  - For the third consecutive year, all three regions of Palm Beach County experienced lower average occupancy rates compared to the prior fiscal year (Central – down 2.7 percentage points from 69.5% to 66.8%; Southern – down 2.0 percentage points from 66.3% to 64.3%; Northern – down 1.9 percentage points from 65.8% to 63.9%). (table 5, pg. 20)
- Managers of smaller properties (50-100 rooms) cited occupancy rates (56.3%) lower than that of larger properties (101+ rooms) (66.8%). (table 5 pg. 20)
  - In FY 2007/08, occupancy rates declined among smaller (50-100 rooms) properties, but remained at parity among larger (101+ rooms) properties compared to the prior fiscal year (Smaller properties – from 63.9% to 56.3%, a decrease of 7.6 percentage points; Larger properties from 68.0% to 66.8%; a difference of 1.2 percentage points). (table 5, pg. 20)
- Relative to last year (979,774), more hotel room nights were occupied by conference/convention groups in all participating PBC hotels in FY 2007/08 (1,017,002 room nights, a 3.8 percentage point increase). However, the number of room nights occupied by conference/convention groups decreased at hotels specifically designated as convention hotels (from 699,246 in FY 2006/07 to 667,089 in FY 2007/08, a 4.6 percentage point decrease). (table 12, pg. 27)
- The estimated number of guests who stayed in Palm Beach County hotels during FY 2007/08 was 2,083,936\*. This represents an 11.5 percentage point decrease compared to FY 2006/07 (2,354,297\*). (table 17, pg. 32)
  - Hotel visitors' estimated total expenditures during FY 2007/08 (~\$1.53 billion) have declined by 2.4 percentage points relative to the prior fiscal year (~\$1.57 billion). (table 17, pg.33)
  - The estimated number of Palm Beach County visitors decreased by 11.5 percentage points in FY 2007/08 (4,167,872\*) compared to FY 2006/07 (4,708,594\*). (table 1, pg. 4)
- The average number of nights in hotels/motels remained at parity during FY 2007/08 (3.3 in FY 2006/07 and 3.4 in FY 2007/08). However, the number of hotel guests decreased by 270,361 in FY 2007/08 compared to the prior year (from 2,354,297\* to 2,083,936\*). As such, the number of occupied room nights declined by 128,875 (from 3,628,164\* in FY 2006/07 to 3,499,289\* in FY 2007/08). (table 1, pg. 4)

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



# Fiscal Year 2008 Summary

## Average Daily Room Rate (ADR)

- The Average Daily Room Rate in FY 2007/08 (\$164.07) increased relative to the previous four fiscal years (\$130.09 in FY 2003/04, \$148.86 in FY 2004/05, \$147.16 in FY 2005/06, \$148.24 in FY 2006/07) . (table 1, pg. 4)
- The highest Average Daily Room Rate was noted in March (\$241.20) and the lowest was in September (\$109.30). (table 10, pg. 25)

## Characteristics of Stay

- The average party size\* of surveyed PBC hotel guests in FY 2007/08 was 2.0, comparable to the prior four years (all 2.1). (table 15, pg. 30)
- Surveyed hotel guests spent an average of 3.4 nights in Palm Beach County hotels during FY 2007/08. (table 15, pg. 30)
- As seen in prior years, business travelers (60%) outnumbered all other types of travelers in FY 2007/08, including vacationers (35%). (table 15, pg. 30)

\*Starting in fiscal year 2001/02, if 'party size' is greater than 8 or 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is deleted.





# Property Manager Survey Summary



# Property Manager Survey: Fiscal Year 2008

## Occupancy Rates

- In fiscal year 2007/08, the average occupancy rate of participating Palm Beach County hotels was 65.2%, a 2.2 percentage point decline compared to FY 2006/07 (67.4%). (table 18, pg. 34)
  - In FY 2007/08, relative to the prior year, occupancy rates among smaller hotels (50-100 rooms) decreased by 7.6 percentage points (from 63.9% to 56.3%), while occupancy rates among larger hotels (101+ rooms) remained at parity (68.0% and 66.8%). (table 18 pg. 34)
  - Managers at larger properties (101+ rooms) reported an average occupancy rate 10.5 percentage points higher than managers at smaller properties (50-100 rooms) in FY 2007/08 (56.3% smaller hotels, 66.8% larger hotels). (table 18 pg. 34)
  - During FY 2007/08 the occupancy rate reached its highest level in February and March (both 81.8%) and dropped to its lowest in September (46.2%); a similar trend to the past two fiscal years. (table 19 pg. 35)
- As in prior fiscal years, properties in the Central region of Palm Beach County saw the highest average occupancy rate in FY 2007/08 (66.8%), while properties in the Northern and Southern regions experienced occupancy rates comparable to each other (63.9% for the Northern region and 64.3% for the Southern region). (table 18, pg. 34)
  - Participating hotels from the Central geographic region experienced a decrease in occupancy rate compared to FY 2006/07 (Central – from 69.5% to 66.8%, a decline of 2.7 percentage points). The occupancy rates at hotels in the Southern and Northern regions remained at parity with the previous fiscal year (Southern – from 66.3% to 64.3%, Northern – from 65.8% to 63.9%). (table 18 pg. 34)
- The total number of room nights\* occupied in FY 2007/08 was 3,499,289 – 128,875 or 3.6 percentage points fewer than in the prior fiscal year (3,628,164). (table 18, pg. 34)
- In FY 2007/08, the percentage of group bookings remained at parity with FY 2006/07 among all Palm Beach County hotels (26.8% in FY 2006/07 and 29.0% in FY 2007/08), as well as at hotels specifically designated as convention hotels (30.7% in FY 2006/07 and 32.5% in FY 2007/08). (table 22 pg. 38)
- The number of room nights occupied by group bookings in designated Palm Beach County convention hotels decreased by 4.6 percentage points (32,157 room nights) in FY 2007/08 (from 699,246 room nights in FY 2006/07 to 667,089 room nights in FY 2007/08). (table 22, pg. 38)
- According to the hotel managers who responded, on average, 6.2% of hotel guests were from countries other than the US, 2.2 percentage points more than in the prior fiscal year (4.0%). (table 25, pg. 41)
  - As seen in the prior fiscal years, in FY 2007/08 smaller properties (50-100 rooms) continued to experience a higher percentage of international guests (10.9%) than larger properties (101+ rooms) (5.3%). (table 25, pg. 41)
  - In terms of geographic area, property managers in the Southern region reported the highest percentage of international guests (8.8%), compared to 3.4% in the Northern region and 5.3% in the Central region. (table 25, pg. 41)

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



# Property Manager Survey: Fiscal Year 2008

## Average Daily Room Rate (ADR)

- **The Average Daily Room Rate (ADR) in FY 2007/08 was \$164.07, 10.7 percentage points (\$15.83) higher than FY 2006/07 (\$148.24).** (table 20, pg. 36)
  - Managers from larger properties (101+ rooms) cited an ADR of \$165.28, which is an increase of 9.8 percentage points (\$14.72) compared to the prior fiscal year (\$150.56). (table 20, pg. 36)
  - The ADR reported by managers at smaller hotels (50-100 rooms) was \$160.32. This represents an increase of 20.3 percentage points (\$27.09) compared to FY 2006/07 (\$133.23), (table 20, pg. 36)
  - In FY 2007/08, property managers reported the highest ADR for the month of March (\$241.20) and the lowest for the month of September (\$109.30). (table 21 pg. 37)



# Hotel Visitor Survey Summary



# Hotel Visitor Survey: Fiscal Year 2008

## Characteristics of Stay

- During the 2007/08 fiscal year the average party size\* of Palm Beach County hotel guests was 2.0. PBC surveyed visitors spent an average of 3.4 nights in a hotel, and occupied, on average, 1.3 rooms per night. This is all comparable with recent years. (table 26, pg. 43)
- As in prior years, business travel (conference/convention/business meeting) was the reason approximately sixty-percent of PBC surveyed visitors traveled to Palm Beach County (59.6%) in FY 2007/08. Vacationers comprised more than one third of surveyed guests who visited Palm Beach County during this same period (34.5%). (table 31, pg. 48)

## Planning a Trip to Palm Beach County

- Comparable with the previous fiscal year, 'work related trip' was stated by more than one-half of surveyed hotel guests in the 2007/08 fiscal year when asked why they chose Palm Beach County rather than another destination (57.8%). (table 32, pg. 49)
  - 'Visiting friends/relatives' (20.7%) and 'Previous visit' (13.2%) were other frequently mentioned responses for selecting Palm Beach County rather than another destination. (table 32, pg. 49)
- During the 2007/08 fiscal year, more than one-half of surveyed hotel guests stated 'Employer' as the decision maker regarding the trip to Palm Beach County (55.5%), which is at parity with the previous fiscal year (54.3%). (table 31, pg. 48)
  - More than one-third of surveyed hotel guests claimed that the decision to travel to Palm Beach County was made by the 'Head of Household/Other adult' (36.2%). (table 31, pg. 48)
- Nearly six-in-ten PBC surveyed visitors arranged the trip to Palm Beach County one month or less in advance (58.0%), at parity with FY 2006/07 (57.0%). (table 31, pg. 48)

## Booking a Trip to Palm Beach County

- Slightly fewer than one-quarter of visitors surveyed during FY 2007/08 used a Travel Agency to book any part of the trip to Palm Beach County (22.9%). (table 33, pg. 50)
- With approximately one-half of surveyed visitors claiming to have done so, use of the Internet as a tool to book any part of the trip remained at parity with the prior fiscal year (46.8% in FY 2006/07 and 47.1% in FY 2007/08). (table 33, pg. 50)
  - Among those who used the Internet, three-quarters of surveyed hotel guests used it to make hotel reservations (75.3%, a 4.6 percentage point increase compared to FY 2006/07, 70.7%), approximately two-thirds of surveyed guests reserved airfare (67.8%, at parity compared to the prior fiscal year, 69.3%) and approximately four-in-ten surveyed guests reserved rental cars through the Internet (39.0%, at parity with FY 2006/07, 39.5%). (table 33, pg. 50)
  - During the 2007/08 fiscal year, 4.9% of hotel guests reported that their trip to PBC was part of a package (that may have included airfare, lodging, meals, rental car, etc). (table 33, pg. 50)

\*Starting in fiscal year 2001/02, if 'party size' is greater than 8 or 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is deleted.



# Hotel Visitor Survey: Fiscal Year 2008

## Visitor Expenditures

- **The average per party\* expenditure during FY 2007/08 was \$1,465 - a \$69 (4.9%) increase compared to the prior year (\$1,396).** (table 27, pg. 44)
  - Compared to last fiscal year, increases occurred in average expenditures for 'Restaurant/Bar' (from \$347 to \$377, up 8.6%), 'Local Travel' (from \$129 to \$143, up 10.9%) and 'Gifts/Shopping' (from \$102 to \$133, up 30.4%). Decreases were only seen in expenditures related to 'Entertainment/Recreation' (from \$53 to \$34, down 35.8%). Average 'Lodging' expenditures remained at parity relative to the prior fiscal year (\$766 and \$779). (table 27, pg. 44)
- **The average per person expenditure was \$733 – 10.2% higher than in FY 2006/07 (\$665). The average per person/day expenditure increased by 7.5% compared to the prior fiscal year (from \$201 to \$216).** (table 27, pg. 44)
- **On average, leisure travelers spent \$1,802 per party and Business travelers spent \$1,186 per party while in Palm Beach County.** (table 28, pg. 45)
  - Relative to FY 2006/07, leisure travelers' per party expenditures increased by 7.8% (from \$1,672 in FY 2006/07 to \$1,802 in FY 2007/08). Business visitors' per party expenditure remained at parity with the prior fiscal year (\$1,175 in FY 2006/07 and \$1,186 in FY 2007/08). (table 28, pg. 45)
  - The average party size\* of PBC leisure guests was 2.5 and for business guests the average was 1.6. Leisure visitors spent an average of 3.9 nights in PBC hotels/motels, while business travelers spent an average of 2.9 nights in hotels/motels. (table 28, pg. 45)

## Characteristics of Visitors

- **As in FY 2006/07, most PBC hotel guests surveyed during FY 2007/08 were 35 to 54 years old (54.8%), White/Caucasian (91.6%), worked in professional/managerial occupations (60.5%), and claimed household incomes of \$100,000 or more (67.6%).** (table 39, pg. 56; table 40, pg. 57; table 41, pg. 58)
- **Approximately eight-in-ten leisure travelers traveled with adult family members or friends (80.9%). Most business travelers traveled alone (54.2%) or with business associates (33.9%).** (table 39, pg. 56)

## Travel Details

- **More than one-quarter of visitors surveyed during FY 2007/08 were visiting Palm Beach County for the first time (26.5%), which is 2.4 percentage points more than FY 2006/07 (24.1%).** (table 36, pg. 53)
- **Approximately nine-in-ten surveyed visitors reported that their main destination was Palm Beach County in FY 2007/08 (91.5%), at parity with the past four fiscal years (90.1% in FY 2003/04, 91.4% in FY 2004/05, 91.1% in FY 2005/06 and 90.0% in FY 2006/07).** (table 36, pg. 53)
- **The most popular mode of transportation used by visitors to get to PBC continued to be by air (75.7%, a 2.5 percentage point increase compared to the previous fiscal year, 73.2%). Car travel, on the other hand, decreased by 2.1 percentage points (from 31.5% in FY 2006/07 to 29.4% in FY 2007/08).** (table 36, pg. 53)
- **Nearly nine-in-ten surveyed hotel guests were domestic travelers in FY 2007/08 (89.1%), which is 2.6 percentage points lower than the prior fiscal year (91.7%).** (table 42, pg. 59)

\*Starting in fiscal year 2001/02, if 'party size' is greater than 8 or 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is deleted.



# Hotel Visitor Survey: Fiscal Year 2008

## Attitudes toward Palm Beach County – Likes/Dislikes About Trip

- **Comparable to previous fiscal years, surveyed hotel guests in the 2007/08 fiscal year continued to mention ‘Climate/Weather’ as the aspect of the trip to Palm Beach County they liked the best (39.5%).** (table 37, pg. 54)
  - Other facets surveyed visitors frequently mentioned included ‘Beaches/Ocean’ (13.1%) and ‘Beautiful Area’ (7.3%). (table 37, pg. 54)
- **‘Traffic/bad drivers’ continued to be the most disliked aspect of Palm Beach County, mentioned by three-in-ten surveyed visitors. ‘Humidity/poor weather’ followed with 19.1% of visitors citing this attribute.** (table 38, pg. 55)

## Activity Participation

- **While visiting Palm Beach County, more than ninety-percent of hotel guests surveyed in FY 2007/08 continued to report dining at area restaurants (94.3%). Other popular activities included shopping (31.0%), going to the beach (27.7%), swimming (16.8%), going to Bars/Nightclubs (9.5%), and visiting Downtown West Palm Beach/City Place (9.0%).** (table 34, pg. 51)
  - Overall, mentions of going to bars/nightclubs have declined by 2.6 percentage points compared to the previous fiscal year (from 12.1% in FY 2006/07 to 9.5% in FY 2007/08). All other activities remained at relative parity with FY 2007/08. (table 34, pg. 51)

## Return Visits

- **Most surveyed guests claimed to have plans to return to Palm Beach County for another visit (83.7%, at parity with FY 2006/07, 84.3%).** (table 35, pg. 52)
  - Among those who plan to visit PBC again, nearly seven-in-ten plan do so within the next year (69.4%). (table 35, pg. 52)
  - Three percent of surveyed guests claimed that they have no plans to visit PBC again in the future; most did not provide a reason why not (49.8%). Among those who provided a response, ‘no business in the area’ (19.6%), ‘too far’ (6.8%) and ‘Don’t like it here’ (6.0%) were the top mentions. (table 35, pg. 52)



# Summary Tables





**Table 2  
HOTEL OCCUPANCY IN PALM BEACH COUNTY  
FISCAL YEAR 2003/04 THROUGH FISCAL YEAR 2007/08**

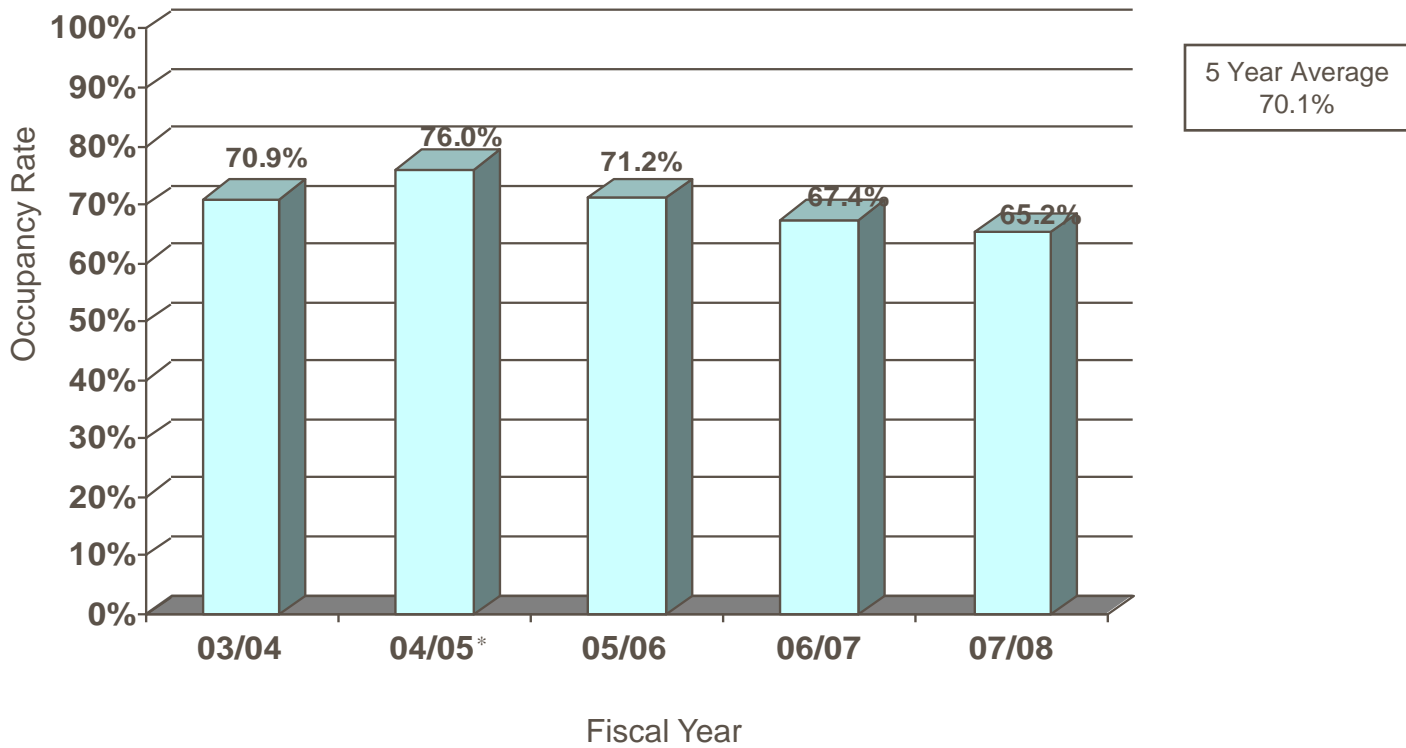
FISCAL YEAR	HOTEL OCCUPANCY RATE	% POINT CHANGE FY TO FY	ROOM NIGHTS OCCUPIED	% CHANGE FY TO FY	AVAILABLE INVENTORY*	% CHANGE FY TO FY
2003/04	70.9%	5.2%	4,003,012*	7.0%	5,641,246*	- 1.1%
2004/05	76.0%	5.1%	4,057,276**	1.4%	5,352,902**	- 5.1%
2005/06	71.2%	- 4.8%	3,829,804*	- 5.6%	5,378,710*	0.5%
2006/07	67.4%	- 3.8%	3,628,164*	- 5.3%	5,386,713*	0.1%
2007/08	65.2%	- 2.2%	3,499,289*	- 3.6%	5,373,706*	- 0.2%
<b>5 YEAR AVERAGE</b>	70.1%	- 0.1%	3,803,509	- 1.2%	5,426,655	- 1.2%

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

+ During FY 2004-05 room nights unavailable due to hurricane/renovation closures were excluded.



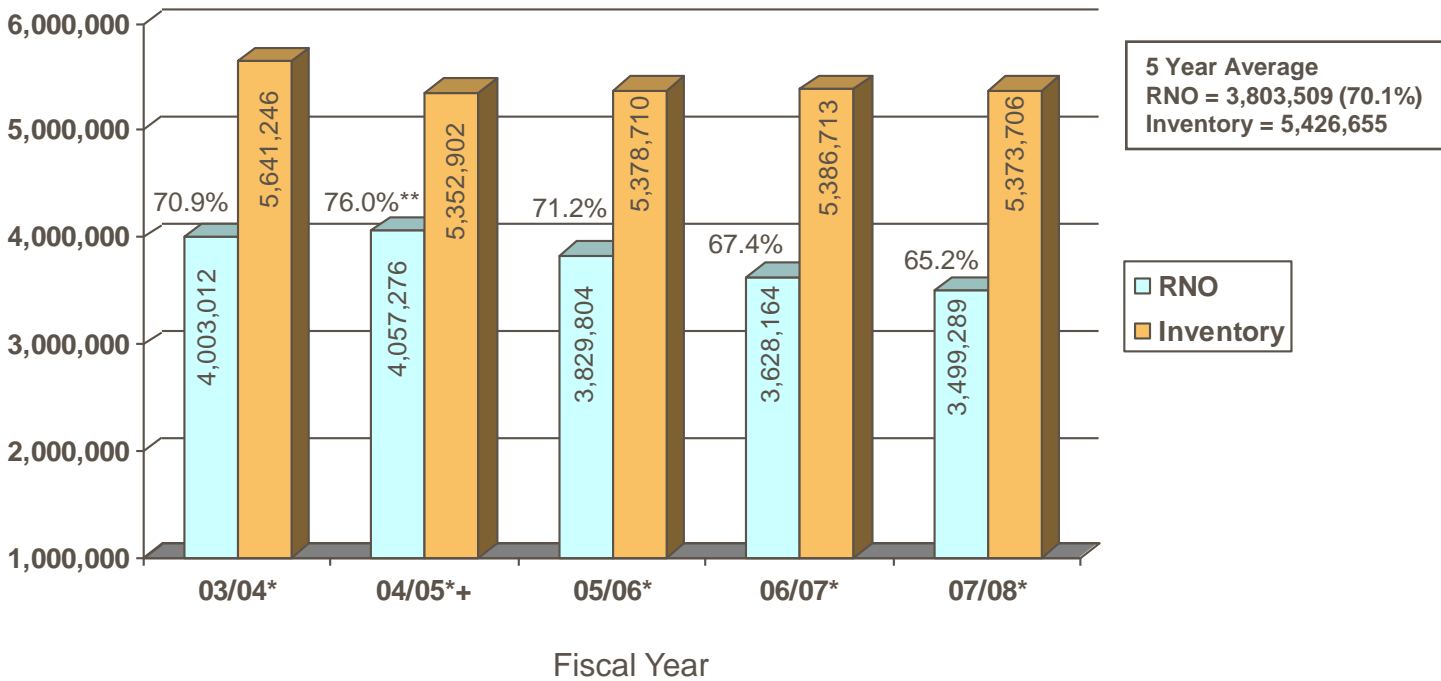
Table 3  
Annual Hotel Occupancy Rate Trends



\*The occupancy rate in FY 2004/2005 was impacted by Hurricane Wilma, which brought many FEMA, insurance and repair workers to the area and closed four major area hotels for storm related renovations, therefore increasing occupancy among those hotels that remained open.



Table 4  
Annual Number of Hotel Room Nights  
Occupied (RNO) and Available Inventory



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

+ During FY 2004-05 room nights unavailable due to hurricane/renovation closures are excluded.

\*\*The occupancy rate in FY 2004/2005 was impacted by Hurricane Wilma, which brought many FEMA, insurance and repair workers to the area and closed four major area hotels for storm related renovations, therefore increasing occupancy among those hotels that remained open.



**Table 5**  
**HOTEL OCCUPANCY RATE BY HOTEL SIZE AND GEOGRAPHIC REGION**  
**FISCAL YEAR 2003/04 THROUGH FISCAL YEAR 2007/08**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
<b>Total Occupancy Rate</b>	70.9%	76.0%	71.2%	67.4%	65.2%	70.1%
<b>Hotel Size</b>						
50 - 100 Rooms	69.0%	74.2%	71.6%	63.9%	56.3%	67.0%
101 + Rooms	71.5%	76.3%	71.1%	68.0%	66.8%	70.7%
101-219 Rooms	72.2%	78.2%	71.2%	67.7%	64.7%	70.8%
220-500 Rooms	70.4%	74.0%	71.8%	69.6%	69.6%	71.1%
<b>Region</b>						
North	68.4%	74.8%	71.4%	65.8%	63.9%	68.9%
Central	72.9%	78.6%	72.4%	69.5%	66.8%	72.0%
South	70.7%	74.0%	70.1%	66.3%	64.3%	69.1%
<b>Available Inventory</b>	5,641,246*	5,352,902**	5,378,710*	5,386,713*	5,373,706*	5,426,655

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

+ During FY 2004-05 room nights unavailable due to hurricane/renovation closures were excluded.

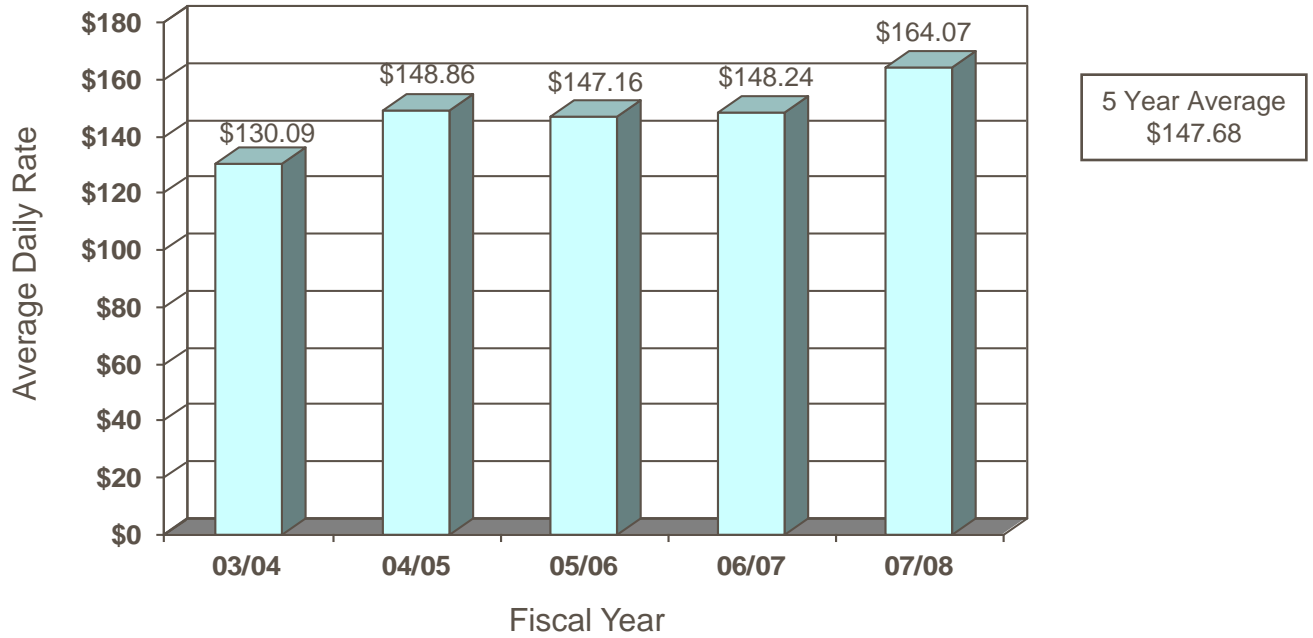


**Table 6**  
**AVERAGE DAILY ROOM RATE (ADR) IN PALM BEACH COUNTY**  
**FISCAL YEAR 2003/04 THROUGH FISCAL YEAR 2007/08**

<b>FISCAL YEAR</b>	<b>AVERAGE DAILY ROOM RATE</b>	<b>% CHANGE FY TO FY</b>
2003/04	\$130.09	3.7%
2004/05	\$148.86	14.4%
2005/06	\$147.16	- 1.1%
2006/07	\$148.24	0.7%
2007/08	\$164.07	10.7%
<b>5 YEAR AVERAGE</b>	\$147.68	5.7%



Table 7  
Annual Average Daily Room Rate (ADR) Trends





**Table 8  
Gross Lodging Revenues\***

Month	FY 2005 Gross Rentals	FY 2005 Gross Collections	FY 2006 Gross Rentals	FY 2006 Gross Collections	FY 2007 Gross Rentals	FY 2007 Gross Collections	FY 2008 Gross Rentals	FY 2008 Gross Collections
October	\$23,366,743.74	\$864,187.90	\$32,749,480.11	\$1,039,385.87	\$23,825,421.51	\$886,574.48	\$24,423,485.18	\$1,131,674.97
November	\$47,411,619.28	\$1,629,501.98	\$29,546,352.45	\$1,071,431.96	\$33,957,902.55	\$1,244,490.46	\$35,666,381.09	\$1,676,048.79
December	\$43,398,721.40	\$1,675,407.00	\$49,598,509.33	\$1,883,848.00	\$42,914,008.10	\$1,654,439.00	\$43,267,889.21	\$2,055,306.98
January	\$57,075,935.66	\$2,208,263.86	\$60,057,706.49	\$2,307,616.18	\$52,063,956.93	\$2,385,000.70	\$55,134,430.15	\$2,667,165.77
February	\$67,987,891.16	\$2,615,053.95	\$71,802,017.67	\$2,773,092.62	\$72,070,998.40	\$3,438,956.93	\$69,834,953.13	\$3,406,194.62
March	\$77,922,671.28	\$3,104,514.00	\$89,313,319.12	\$3,493,487.00	\$79,873,677.03	\$3,858,124.00	\$80,758,299.80	\$3,945,919.60
April	\$82,444,090.70	\$3,181,774.76	\$85,582,586.01	\$3,291,238.57	\$85,494,627.79	\$4,096,406.37	\$81,881,478.89	\$3,963,407.46
May	\$56,076,936.66	\$2,182,436.22	\$59,889,914.76	\$2,352,605.80	\$57,933,494.53	\$2,741,312.88	\$56,906,714.60	\$2,692,789.88
June	\$42,310,189.91	\$1,498,682.00	\$43,316,634.57	\$1,669,614.00	\$40,732,061.70	\$2,155,836.00	\$38,429,652.91	\$1,861,531.51
July	\$35,019,857.38	\$1,345,748.67	\$38,183,648.36	\$1,466,735.27	\$33,682,695.95	\$1,600,277.30	\$31,254,113.50	\$1,519,681.75
August	\$29,282,792.57	\$1,105,729.33	\$31,460,455.98	\$1,138,400.64	\$29,607,325.38	\$1,382,131.50	\$29,836,695.65	\$1,450,767.45
September	\$32,082,312.49	\$1,105,074.00	\$27,238,211.11	\$1,041,111.00	\$28,834,633.45	\$1,374,520.00	\$29,964,297.40	\$1,443,229.32
Total Fiscal	\$594,379,762.23	\$22,516,373.67	\$618,738,835.96	\$23,528,566.91	\$580,990,803.32	\$26,818,069.62	\$577,358,391.51	\$27,813,718.10
<b>Season vs. Non-Season</b>								
Season (November – April)	\$376,240,929.48	\$14,414,515.55	\$385,900,491.07	\$14,820,714.33	\$366,375,170.80	\$16,677,417.46	\$366,543,432.27	\$17,714,043.22
Non – Season	\$218,138,832.75	\$8,101,858.12	\$232,838,344.89	\$8,707,852.58	\$214,615,632.52	\$10,140,652.16	\$210,814,959.24	\$10,099,674.88
Total Fiscal	\$594,379,762.23	\$22,516,373.67	\$618,738,835.96	\$23,528,566.91	\$580,990,803.32	\$26,818,069.62	\$577,358,391.51	\$27,813,718.10
<b>Percentage of Season vs. Non-Season</b>								
Season (November – April)	63.3%	64.0%	62.4%	63.0%	63.1%	62.2%	63.5%	63.7%
Non - Season	36.7%	36.0%	37.6%	37.0%	36.9%	37.8%	36.5%	36.3%

\* In December 2006 the bed tax increased from 4% to 5%. This increase supports the Convention Center and is not part of the general budget.



**Table 9  
MONTHLY TRENDS IN GROSS BED TAX COLLECTIONS**

<b>Month: Industry (Collection)</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>	<b>2007/08</b>	<b>5 YEAR AVERAGE</b>
September (October)	\$805,137.66	\$864,187.90	\$1,039,385.87	\$886,574.48	\$1,131,674.97	\$945,392.18
October (November)	\$1,150,135.00	\$1,629,501.98	\$1,071,431.96	\$1,244,490.46	\$1,676,048.79	\$1,354,321.64
November (December)	\$1,355,438.11	\$1,675,407.00	\$1,883,848.00	\$1,654,439.00	\$2,055,306.98	\$1,724,887.82
December (January)	\$1,735,076.67	\$2,208,263.86	\$2,307,616.18	\$2,385,000.70	\$2,667,165.77	\$2,260,624.64
January (February)	\$2,402,847.90	\$2,615,053.95	\$2,773,092.62	\$3,438,956.93	\$3,406,194.62	\$2,927,229.20
February (March)	\$2,858,812.00	\$3,104,514.00	\$3,493,487.00	\$3,858,124.00	\$3,945,919.60	\$3,452,171.32
March (April)	\$2,809,648.11	\$3,181,774.76	\$3,291,238.57	\$4,096,406.37	\$3,963,407.46	\$3,468,495.05
April (May)	\$2,097,578.95	\$2,182,436.22	\$2,352,605.80	\$2,741,312.88	\$2,692,789.88	\$2,413,344.75
May (June)	\$1,324,593.00	\$1,498,682.00	\$1,669,614.00	\$2,155,836.00	\$1,861,531.51	\$1,702,051.30
June (July)	\$1,190,828.37	\$1,345,748.67	\$1,466,735.27	\$1,600,277.30	\$1,519,681.75	\$1,424,654.27
July (August)	\$1,156,451.75	\$1,105,729.33	\$1,138,400.64	\$1,382,131.50	\$1,450,767.45	\$1,246,696.13
August (September)	\$961,668.00	\$1,105,074.00	\$1,041,111.00	\$1,374,520.00	\$1,443,229.32	\$1,185,120.46
<b>Total Fiscal</b>	<b>\$19,848,215.52</b>	<b>\$22,516,373.67</b>	<b>\$23,528,566.91</b>	<b>\$26,818,069.62</b>	<b>\$27,813,718.10</b>	<b>\$24,104,988.76</b>

\* In December 2006 the bed tax increased from 4% to 5%. This increase supports the Convention Center and is not part of the general budget.





**Table 10**  
**MONTHLY AVERAGE DAILY ROOM RATE (ADR) TRENDS**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
October	\$109.17	\$121.60	\$124.19	\$122.07	\$132.74	\$121.95
November	\$127.25	\$136.95	\$145.99	\$131.16	\$146.15	\$137.50
December	\$139.33	\$143.42	\$148.11	\$149.45	\$172.23	\$150.51
January	\$168.69	\$185.14	\$185.46	\$186.67	\$222.37	\$189.67
February	\$179.88	\$216.02	\$222.86	\$213.29	\$232.92	\$212.99
March	\$181.38	\$218.58	\$199.94	\$211.85	\$241.20	\$210.59
April	\$153.58	\$180.44	\$175.00	\$177.15	\$182.72	\$173.78
May	\$112.80	\$133.26	\$135.32	\$134.96	\$145.63	\$132.39
June	\$103.28	\$111.03	\$115.79	\$119.67	\$131.21	\$116.20
July	\$96.55	\$105.31	\$107.91	\$107.90	\$129.74	\$109.48
August	\$98.10	\$103.20	\$100.37	\$110.25	\$122.63	\$106.91
September	\$91.10	\$131.34	\$104.98	\$114.53	\$109.30	\$110.25



**Table 11**  
**MONTHLY HOTEL OCCUPANCY RATE TRENDS**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
October	61.7%	84.5%	61.2%	62.0%	59.6%	65.8%
November	67.0%	80.8%	82.3%	69.0%	65.6%	72.9%
December	64.0%	74.0%	73.8%	62.7%	63.1%	67.5%
January	74.2%	84.0%	79.7%	73.8%	73.0%	76.9%
February	88.8%	91.1%	86.3%	82.8%	81.8%	86.2%
March	88.4%	89.9%	87.1%	85.6%	81.8%	86.6%
April	79.7%	79.1%	73.6%	73.8%	69.5%	75.1%
May	67.5%	68.5%	70.8%	65.7%	64.6%	67.4%
June	67.7%	70.0%	68.9%	65.6%	62.1%	66.9%
July	66.9%	64.6%	62.1%	59.8%	60.3%	62.7%
August	63.7%	62.0%	57.0%	58.4%	54.6%	59.1%
September	61.5%	62.9%	51.2%	49.9%	46.2%	54.3%



**Table 12**  
**HOTEL ROOM NIGHTS OCCUPIED BY GROUPS IN PALM BEACH COUNTY**  
**FISCAL YEAR 2003/04 THROUGH FISCAL YEAR 2007/08**

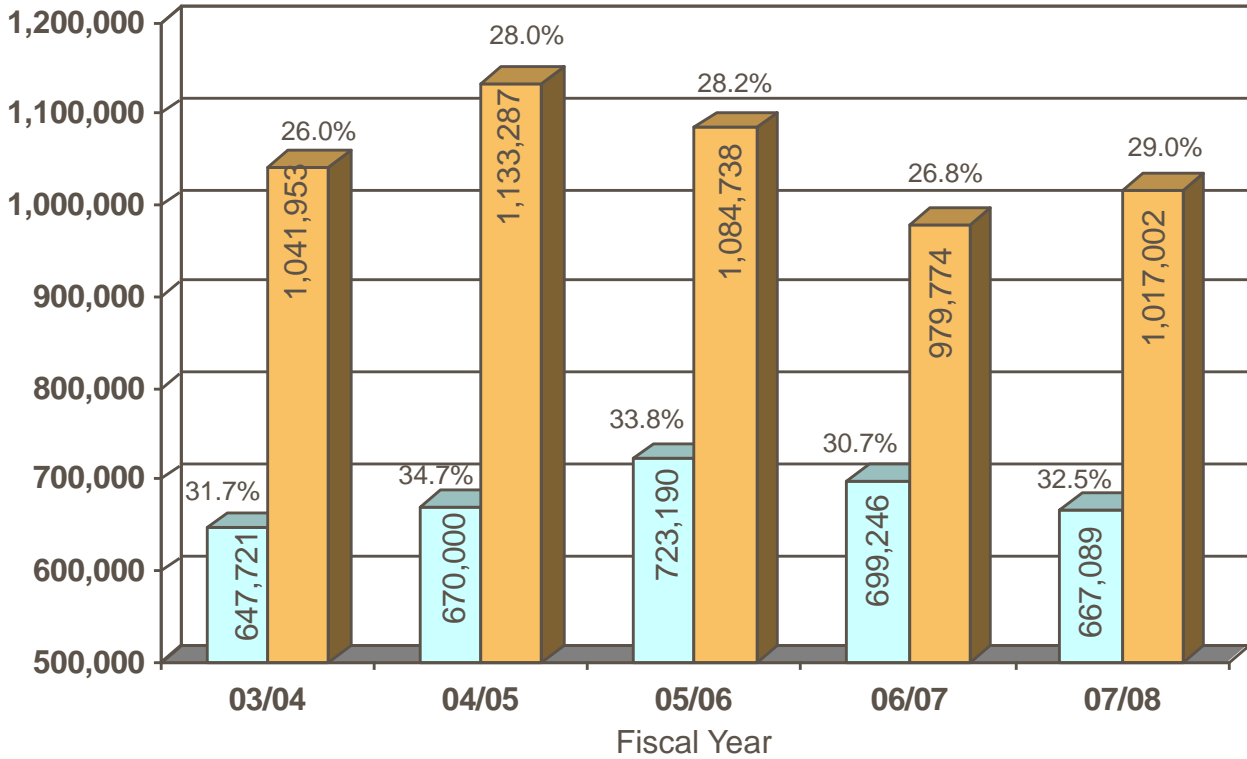
<b>FISCAL YEAR</b>	<b>TOTAL ROOM NIGHTS OCCUPIED</b>	<b>GROUP ROOM NIGHTS</b>	<b>% CHANGE FY TO FY</b>	<b>GROUP ROOM NIGHTS IN CONVEN. HOTELS</b>	<b>% CHANGE FY TO FY</b>
2003/04	4,003,012*	1,041,953	7.0%	647,721	2.6%
2004/05	4,057,276**	1,133,287	8.8%	670,000	3.4%
2005/06	3,829,804*	1,084,738	- 4.3%	723,190	7.9%
2006/07	3,628,164*	979,774	- 9.7%	699,246	- 3.3%
2007/08	3,499,289*	1,017,002	3.8%	667,089	- 4.6%
<b>5 YEAR AVERAGE</b>	3,803,509*	1,051,351	1.1%	681,449	1.2%

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

+ During FY 2004-05 room nights unavailable due to hurricane/renovation closures are excluded.



Table 13  
Annual Room Nights Occupied by Groups



■ Convention Hotels
 ■ All Hotels

Hotels	5 Year Average
<span style="color: lightblue;">■</span> Convention Hotels <span style="color: orange;">■</span> All Hotels	681,449 (32.7%) 1,051,351 (27.6%)



**Table 14  
PERCENT OF MONTHLY GROUP BOOKINGS IN PBC CONVENTION HOTELS**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
October	35.1%	42.3%	44.3%	33.8%	37.9%	38.7%
November	35.2%	40.2%	39.5%	34.9%	35.0%	37.0%
December	23.4%	23.3%	29.4%	25.7%	22.8%	24.9%
January	34.6%	35.6%	34.8%	34.1%	37.0%	35.2%
February	27.5%	30.6%	27.5%	27.8%	30.2%	28.7%
March	32.0%	29.0%	30.5%	27.2%	28.3%	29.4%
April	31.5%	36.9%	34.0%	32.9%	34.2%	33.9%
May	32.1%	37.8%	36.5%	36.0%	35.8%	35.6%
June	35.9%	39.7%	38.1%	36.1%	37.0%	37.4%
July	31.9%	29.0%	31.5%	28.7%	31.2%	30.5%
August	28.6%	29.2%	28.6%	26.7%	27.1%	28.0%
September	32.4%	42.6%	31.0%	23.9%	33.3%	32.6%



**Table 15  
PRIMARY CHARACTERISTICS OF HOTEL GUESTS STAYING IN PALM BEACH COUNTY  
FISCAL YEAR 2003/04 THROUGH FISCAL YEAR 2007/08**

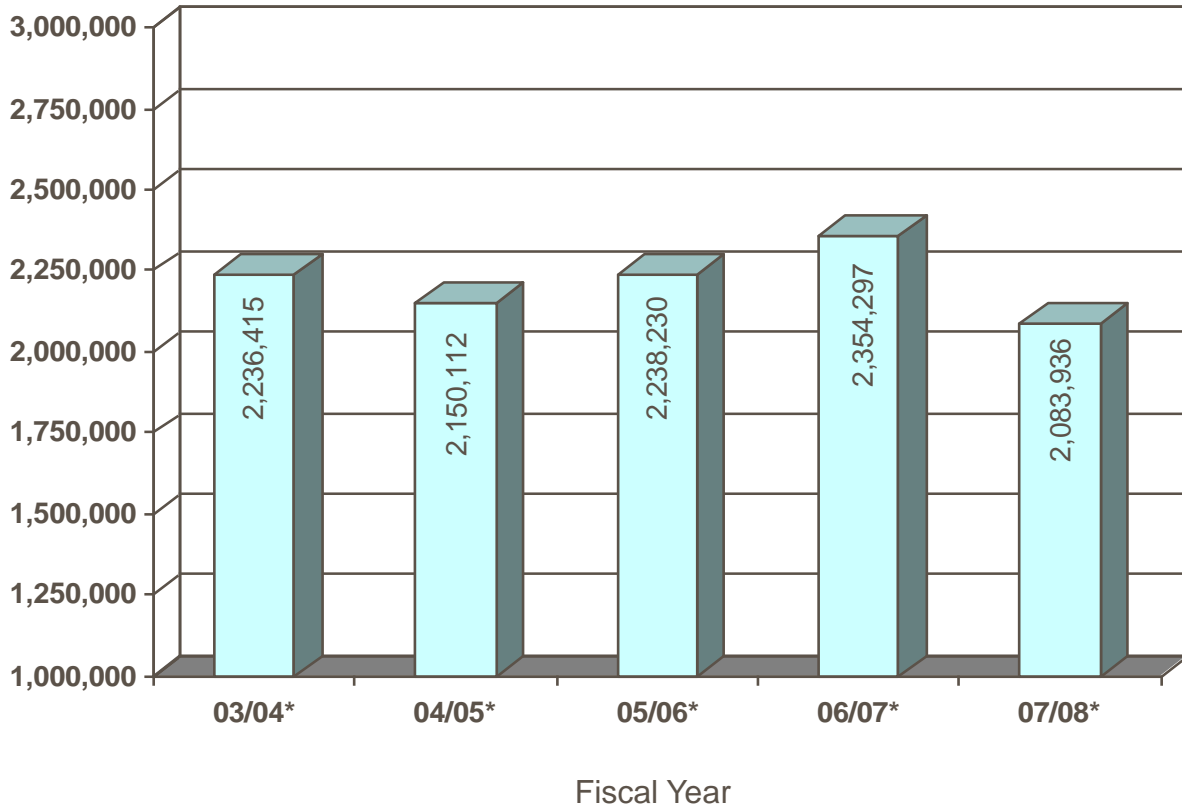
	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
<b>Estimated Number of Hotel Guests</b>	<b>2,236,415+</b>	<b>2,150,112+</b>	<b>2,238,230+</b>	<b>2,354,297+</b>	<b>2,083,936+</b>	2,212,598
Average Party Size**	2.1	2.1	2.1	2.1	2.0	2.1
Nights in Hotel	3.8	4.0	3.6	3.3	3.4	3.6
<b>Purpose of Visit</b>						
Conference/Convention/ Business Meeting	58%	56%	60%	58%	60%	58%
- Business Meeting	49%	49%	52%	51%	51%	50%
- Conference/Convention	7%	7%	6%	7%	8%	7%
- Other Business	1%	1%	2%	1%	0.2%	1%
Vacation/Pleasure	33%	35%	32%	33%	35%	34%
Sports Event	2%	3%	3%	3%	2%	3%
Cultural Attraction	1%	1%	0.4%	1%	0.2%	1%
Other	6%	5%	4%	4%	4%	5%

\*\*Starting in fiscal year 2001/02, if 'party size' is greater than 8 or 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is deleted.

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



Table 16  
Annual Trends in the Estimated Number of Hotel Guests



5 Year Average = 2,212,598

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



**Table 17**  
**ESTIMATED NUMBER OF HOTEL GUESTS AND ESTIMATED TOTAL EXPENDITURES**  
**FISCAL YEAR 2003/04 THROUGH FISCAL YEAR 2007/08**

FISCAL YEAR	HOTEL GUESTS	% CHANGE FY TO FY	EXPENDITURES	% CHANGE FY TO FY
2003/04	2,236,415 *	- 1.1%	\$1,399,995,790	- 13.9%
2004/05	2,150,112 *	- 3.9%	\$1,646,985,792	17.6%
2005/06	2,238,230*	4.1%	\$1,658,528,430	0.7%
2006/07	2,354,297*	5.2%	\$1,565,607,505	- 5.6%
2007/08	2,083,936*	- 11.5%	\$1,527,525,088	- 2.4%
<b>5 YEAR AVERAGE</b>	2,212,598	- 1.4%	\$1,559,728,521	- 0.7%

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





# Property Manager Survey Tables



**Table 18  
HOTEL OCCUPANCY RATE AND ROOM NIGHTS OCCUPIED  
FISCAL YEAR 2003/04 THROUGH 2007/08**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
Occupancy Rate	70.9%	76.0%	71.2%	67.4%	65.2%	70.1%
<b>Occupancy Rate by Hotel Size</b>						
50 -100 Rooms	69.0%	74.2%	71.6%	63.9%	56.3%	67.0%
101+ Rooms	71.5%	76.3%	71.1%	68.0%	66.8%	70.7%
101-219 Rooms	72.2%	78.2%	71.2%	67.7%	64.7%	70.8%
220-500 Rooms	70.4%	74.0%	71.8%	69.6%	69.6%	71.1%
<b>Occupancy Rate by Geographic Region</b>						
North	68.4%	74.8%	71.4%	65.8%	63.9%	68.9%
Central	72.9%	78.6%	72.4%	69.5%	66.8%	72.0%
South	70.7%	74.0%	70.1%	66.3%	64.3%	69.1%
Room Nights Occupied (FYTD)	4,003,012*	4,057,276**	3,829,804*	3,628,164*	3,499,289*	3,803,509
Average Daily Room Rate (ADR)	\$130.09	\$148.86	\$147.16	\$148.24	\$164.07	\$147.68
<b>Percentage of Occupied Room Nights</b>						
Leisure	37.6%	37.1%	38.2%	39.5%	38.6%	38.2%
Business	36.4%	34.8%	33.5%	33.7%	32.5%	34.2%
Conference/Convention	26.0%	28.0%	28.2%	26.8%	29.0%	27.6%

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

+ During FY 2004-05 room nights unavailable due to hurricane/renovation closures were excluded.



**Table 19  
OCCUPANCY RATE TRENDS BY MONTH AND FISCAL YEAR  
FISCAL YEAR 2003/04 THROUGH 2007/08**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
Room Inventory	5,703,912*	5,352,902**	5,378,710*	5,386,713*	5,373,706*	5,439,189
Overall Occupancy Rate	70.9%	76.0%	71.2%	67.4%	65.2%	70.1%
October	61.7%	84.5%	61.2%	62.0%	59.6%	65.8%
November	67.0%	80.8%	82.3%	69.0%	65.6%	72.9%
December	64.0%	74.0%	73.8%	62.7%	63.1%	67.5%
January	74.2%	84.0%	79.7%	73.8%	73.0%	76.9%
February	88.8%	91.1%	86.3%	82.8%	81.8%	86.2%
March	88.4%	89.9%	87.1%	85.6%	81.8%	86.6%
April	79.7%	79.1%	73.6%	73.8%	69.5%	75.1%
May	67.5%	68.5%	70.8%	65.7%	64.6%	67.4%
June	67.7%	70.0%	68.9%	65.6%	62.1%	66.9%
July	66.9%	64.6%	62.1%	59.8%	60.3%	62.7%
August	63.7%	62.0%	57.0%	58.4%	54.6%	59.1%
September	61.5%	62.9%	51.2%	49.9%	46.2%	54.3%
Room Nights Occupied	4,003,012*	4,057,276**	3,829,804*	3,628,164*	3,499,289*	3,803,509

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

+ During FY 2004-05 room nights unavailable due to hurricane/renovation closures were excluded.



**Table 20  
AVERAGE DAILY ROOM RATE (ADR)  
FISCAL YEAR 2003/04 THROUGH 2007/08**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
Average Daily Room Rate (ADR)	\$130.09	\$148.86	\$147.16	\$148.24	\$164.07	\$147.68
ADR by Hotel Size						
50 -100 Rooms	\$113.55	\$133.84	\$124.95	\$133.23	\$160.32	\$133.18
101 + Rooms	\$133.63	\$151.39	\$150.93	\$150.56	\$165.28	\$150.36
101-219 Rooms	\$100.96	\$116.52	\$110.78	\$105.56	\$116.42	\$110.05
220-500 Rooms	\$131.40	\$150.31	\$158.11	\$158.53	\$181.20	\$155.91



**Table 21  
AVERAGE DAILY ROOM RATE (ADR) BY MONTH AND FISCAL YEAR  
FISCAL YEAR 2003/04 THROUGH 2007/08**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
Overall ADR	\$130.09	\$148.86	\$147.16	\$148.24	\$164.07	\$147.68
October	\$109.17	\$121.60	\$124.19	\$122.04	\$132.74	\$121.95
November	\$127.25	\$136.95	\$145.99	\$131.16	\$146.15	\$137.50
December	\$139.33	\$143.42	\$148.11	\$149.45	\$172.23	\$150.51
January	\$168.69	\$185.14	\$185.46	\$186.67	\$222.37	\$189.67
February	\$179.88	\$216.02	\$222.86	\$213.29	\$232.92	\$212.99
March	\$181.38	\$218.58	\$199.94	\$211.85	\$241.20	\$210.59
April	\$153.58	\$180.44	\$175.00	\$177.15	\$182.72	\$173.78
May	\$112.80	\$133.26	\$135.32	\$134.96	\$145.63	\$132.39
June	\$103.28	\$111.03	\$115.79	\$119.67	\$131.21	\$116.20
July	\$96.55	\$105.31	\$107.91	\$107.90	\$129.74	\$109.48
August	\$98.10	\$103.20	\$100.37	\$110.25	\$122.63	\$106.91
September	\$91.10	\$131.34	\$104.98	\$114.53	\$109.30	\$110.25

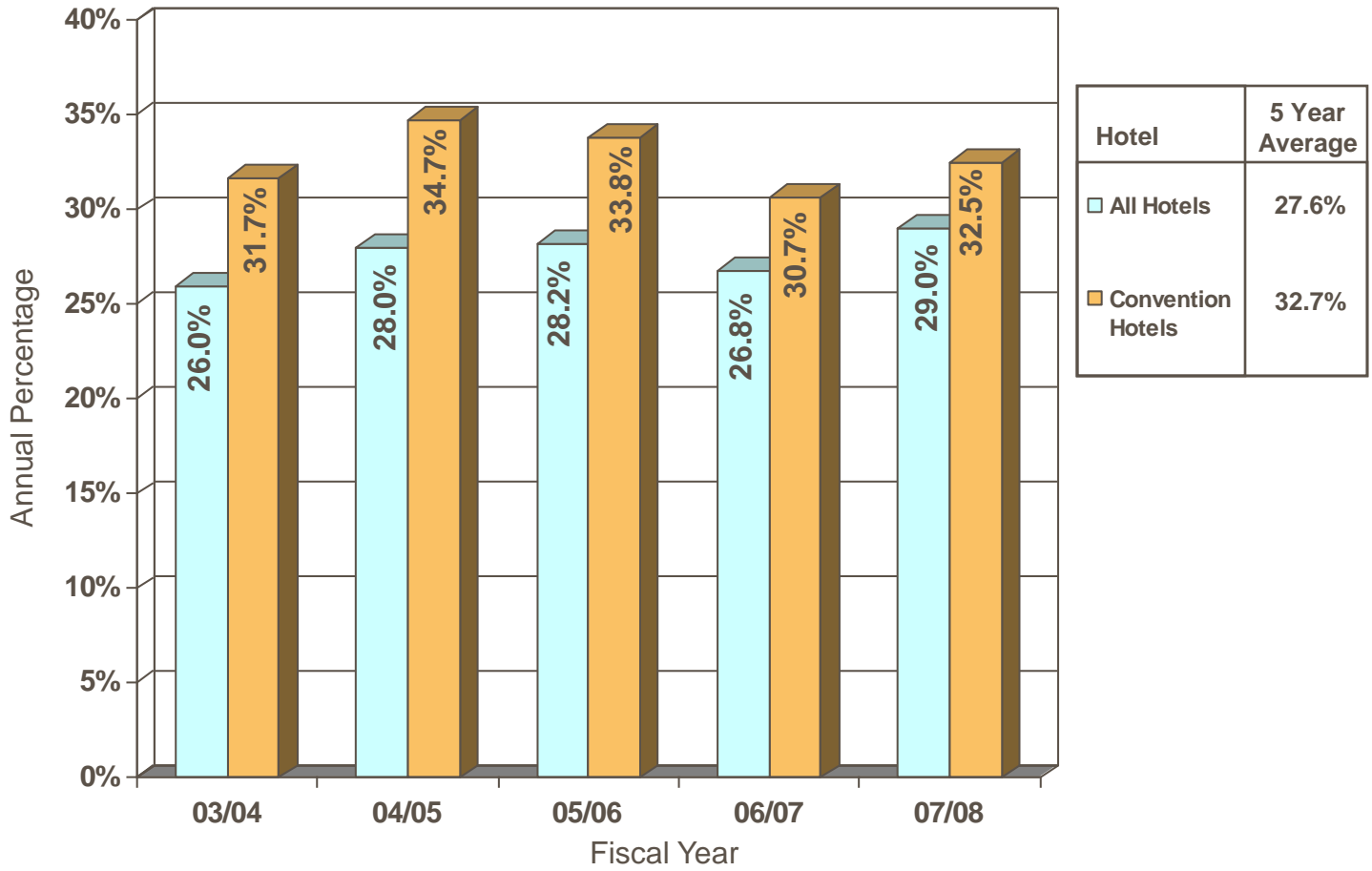


**Table 22  
GROUP BOOKINGS IN PALM BEACH COUNTY  
FISCAL YEAR 2003/04 THROUGH 2007/08**

	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>	<b>2007/08</b>	<b>5 YEAR AVERAGE</b>
% Occupied by Groups in PBC	26.0%	28.0%	28.2%	26.8%	29.0%	27.6%
Room Nights Occupied by Groups in PBC	1,041,953	1,133,287	1,084,738	979,774	1,017,002	1,051,351
% Occupied by Groups in Convention Hotels	31.7%	34.7%	33.8%	30.7%	32.5%	32.7%
Room Nights Occupied by Groups in PBC Convention Hotels	647,721	670,000	723,190	699,246	667,089	681,449



Table 23  
Hotel Room Nights Occupied by Groups





**Table 24  
Response Rates  
FISCAL YEAR 2003/04 THROUGH 2007/08**

<b>Response Rates by Hotel Size</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>	<b>2007/08</b>	<b>5 YEAR AVERAGE</b>
50 -100 Rooms	58.6%	56.6%	50.6%	52.1%	32.9%	50.2%
101+ Rooms	69.5%	66.6%	60.3%	62.4%	66.9%	65.1%
101-219 Rooms	56.9%	48.5%	40.5%	47.4%	52.3%	49.1%
220-500 Rooms	79.9%	85.9%	80.9%	75.1%	80.7%	80.5%
<b>Response Rates by Geographic Region</b>						
North	64.5%	61.5%	57.5%	56.9%	61.2%	60.3%
Central	67.7%	68.1%	59.2%	59.4%	60.3%	62.9%
South	69.7%	64.7%	59.9%	65.7%	64.2%	64.8%
<b>Overall Response Rate</b>	<b>67.9%</b>	<b>65.1%</b>	<b>59.1%</b>	<b>61.4%</b>	<b>62.1%</b>	<b>63.1%</b>





**Table 25  
PERCENTAGE OF INTERNATIONAL GUESTS**

<b>International Guests by Hotel Size</b>	<b>2005/06</b>	<b>2006/07</b>	<b>2007/08</b>	<b>5 YEAR AVERAGE</b>
50 -100 Rooms	5.6%	8.8%	10.9%	8.4%
101+ Rooms	3.1%	3.3%	5.3%	3.9%
101-219 Rooms	3.9%	3.4%	6.4%	4.6%
220-500 Rooms	1.2%	2.0%	5.5%	2.9%
<b>International Guests by Geographic Region</b>				
North	1.4%	2.7%	3.4%	2.5%
Central	3.4%	3.0%	5.3%	3.9%
South	4.6%	6.1%	8.8%	6.5%
<b>Overall Percentage of International Guests</b>	<b>3.5%</b>	<b>4.0%</b>	<b>6.2%</b>	<b>4.6%</b>



# Hotel Visitor Survey Tables



**Table 26  
CHARACTERISTICS OF STAY AMONG HOTEL GUESTS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Visitors Staying in Hotels</b>							
Party Size*	2.1	2.1	2.1	2.1	2.0	- 0.1	2.1
Nights in County	4.0	4.2	3.8	3.3	3.5	0.2	3.8
Nights in Hotel	3.8	4.0	3.6	3.3	3.4	0.1	3.6
Rooms Per Night*	1.3	1.3	1.3	1.3	1.3	0.0	1.3

\*Starting in fiscal year 2001/02, if 'party size' is greater than 8 or 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is deleted.



**Table 27  
VISITOR EXPENDITURES IN PALM BEACH COUNTY**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Average Expenditures Per Visit*</b>							
Lodging	\$600	\$716	\$886	\$766	\$779	13	\$749
Restaurant/Bar	\$315	\$392	\$335	\$347	\$377	30	\$353
Gifts/Shopping	\$163	\$224	\$133	\$102	\$133	31	\$151
Entertainment/Recreation	\$84	\$84	\$50	\$53	\$34	-19	\$61
Local Travel	\$152	\$192	\$151	\$129	\$143	14	\$153
Total Per Party	\$1,315	\$1,608	\$1,555	\$1,396	\$1,465	69	\$1,468
<b>Average Expenditures Per Person Per Day (based on average number of persons per party)</b>							
Total Per Person	\$626	\$766	\$741	\$665	\$733	68	\$706
Total Per Person/Per Day	\$165	\$191	\$206	\$201	\$216	15	\$196
Lodging	\$75	\$85	\$117	\$110	\$115	5	\$100
Restaurant/Bar	\$40	\$47	\$44	\$50	\$56	6	\$47
Gifts/Shopping	\$20	\$27	\$18	\$15	\$20	5	\$20
Entertainment/Recreation	\$10	\$10	\$7	\$8	\$5	- 3	\$8
Local Travel	\$19	\$23	\$20	\$19	\$21	2	\$20

\* Starting in October 2005, Side Trips were excluded from computation of visitors expenditures (no longer asked on survey). Prior data shown has been recalculated to reflect this change.



**Table 28  
HOTEL VISITOR EXPENDITURES IN PALM BEACH COUNTY BY PURPOSE OF THE VISIT<sup>1</sup>**

	2003/2004					2004/2005					2005/2006					2006/2007					2007/2008				
	Leisure	Group*	Bus.	Sports	Other	Leisure	Group*	Bus.	Sports	Other	Leisure	Group*	Bus.	Sports	Other	Leisure	Group*	Bus.	Sports	Other	Leisure	Group*	Bus.	Sports	Other
Average Party Size**	2.6	2.1	1.7	2.2	2.0	2.6	2.1	1.7	2.6	2.3	2.6	1.9	1.7	2.7	2.5	2.6	2.1	1.7	2.9	2.1	2.5	1.8	1.6	2.4	2.3
Nights in Hotel/Motel	4.9	3.4	3.1	4.1	2.5	4.9	4.0	3.3	5.4	2.4	4.3	3.5	3.0	4.8	3.6	3.7	3.1	2.9	4.5	2.4	3.9	3.5	2.9	4.8	2.9
<b>Expenditures</b>																									
Lodging	\$784	\$564	\$487	\$742	\$290	\$951	\$760	\$551	\$961	\$382	\$1,101	\$1,008	\$708	\$1,147	\$731	\$873	\$797	\$653	\$1,278	\$442	\$878	\$872	\$667	\$1,214	\$545
Restaurant/Bar	\$461	\$343	\$223	\$480	\$163	\$554	\$328	\$290	\$664	\$166	\$400	\$315	\$279	\$504	\$385	\$407	\$220	\$305	\$518	\$194	\$464	\$371	\$302	\$845	\$325
Gifts/Shopping	\$314	\$136	\$87	\$201	\$108	\$421	\$200	\$99	\$432	\$67	\$280	\$130	\$54	\$230	\$112	\$181	\$56	\$55	\$216	\$115	\$246	\$60	\$70	\$235	\$171
Entertainment/Rec.	\$118	\$109	\$62	\$57	\$28	\$127	\$88	\$46	\$308	\$0	\$86	\$39	\$33	\$86	\$101	\$70	\$19	\$41	\$180	\$41	\$55	\$4	\$20	\$187	\$12
Local Travel	\$211	\$143	\$115	\$189	\$70	\$240	\$132	\$158	\$448	\$84	\$172	\$77	\$135	\$115	\$155	\$141	\$65	\$122	\$243	\$53	\$160	\$95	\$128	\$259	\$131
Total Per Party	\$1,887	\$1,295	\$973	\$1,669	\$658	\$2,293	\$1,508	\$1,145	\$2,813	\$698	\$2,038	\$1,568	\$1,209	\$2,083	\$1,483	\$1,672	\$1,156	\$1,175	\$2,435	\$845	\$1,802	\$1,400	\$1,186	\$2,741	\$1,183
Total Per Person	\$726	\$617	\$573	\$759	\$329	\$882	\$718	\$674	\$1,082	\$304	\$784	\$825	\$711	\$772	\$593	\$643	\$551	\$691	\$839	\$402	\$721	\$778	\$741	\$1,142	\$514
Total Per Person/Day	\$148	\$181	\$185	\$185	\$132	\$180	\$180	\$204	\$200	\$127	\$182	\$236	\$237	\$161	\$165	\$174	\$178	\$238	\$187	\$168	\$185	\$222	\$256	\$238	\$177

	5 YEAR AVERAGE				
	Leisure	Group*	Bus.	Sports	Other
Average Party Size**	2.6	2.0	1.7	2.6	2.2
Nights in Hotel/Motel	4.3	3.5	3.0	4.7	2.8
<b>Expenditures</b>					
Lodging	\$917	\$800	\$613	\$1,068	\$478
Restaurant/Bar	\$457	\$315	\$280	\$602	\$247
Gifts/Shopping	\$288	\$116	\$73	\$263	\$115
Entertainment/Rec.	\$91	\$52	\$40	\$164	\$36
Local Travel	\$185	\$102	\$132	\$251	\$99
Total Per Party	\$1,938	\$1,385	\$1,138	\$2,348	\$973
Total Per Person	\$751	\$698	\$678	\$919	\$428
Total Per Person/Day	\$174	\$199	\$224	\$194	\$154

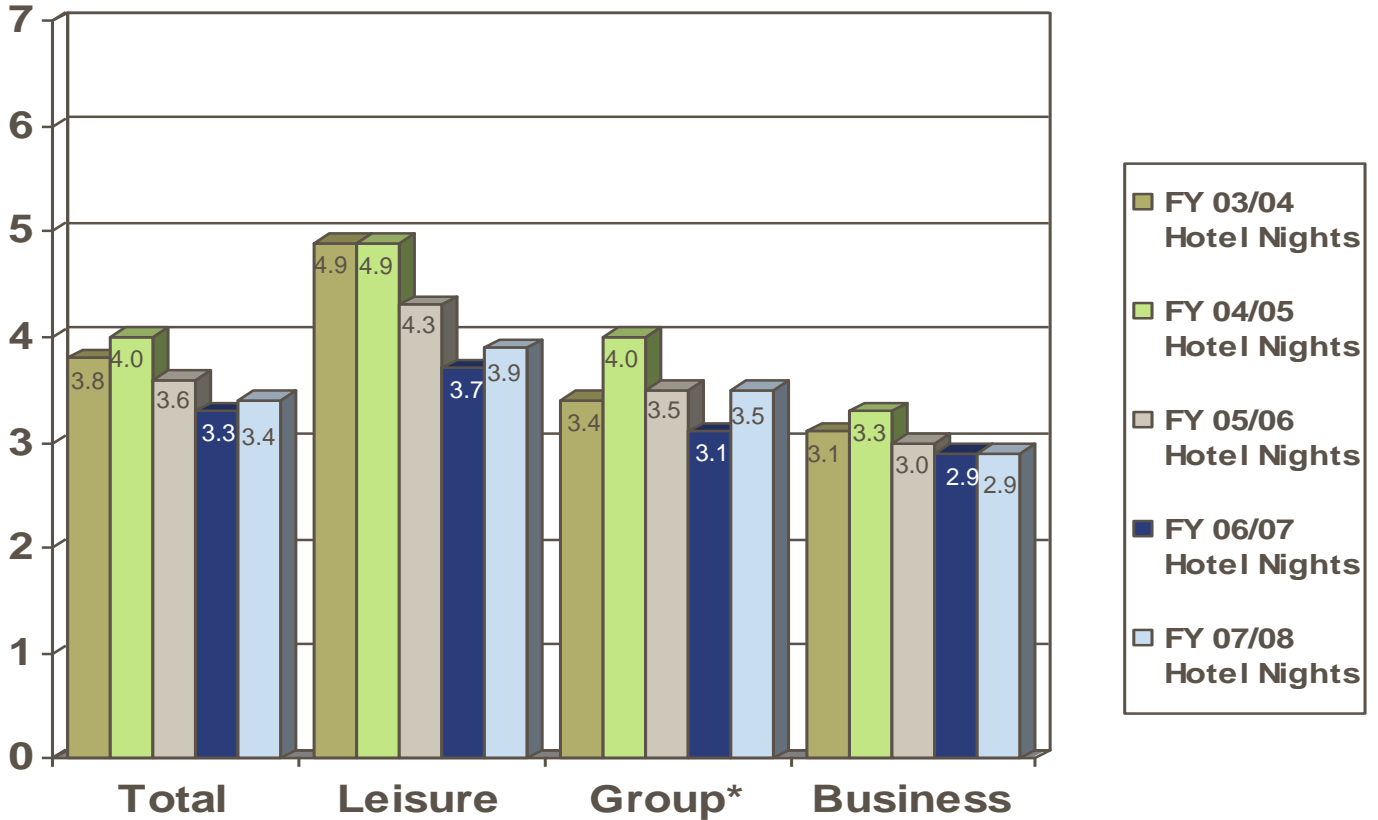
\*Starting in FY 2001/02, group includes Conference/Convention as well as Film/TV production.

\*\*Starting in fiscal year 2001/02, if 'party size' is greater than 8 or 'number of rooms occupied' is greater than 3, then data within 'party size' and 'number of rooms occupied' is deleted.

<sup>1</sup> Results may not be directly comparable to prior year, same month, due to availability of specific hotels at which interviewing was conducted.



Table 29  
Average Number of Hotel Nights by Traveler Group

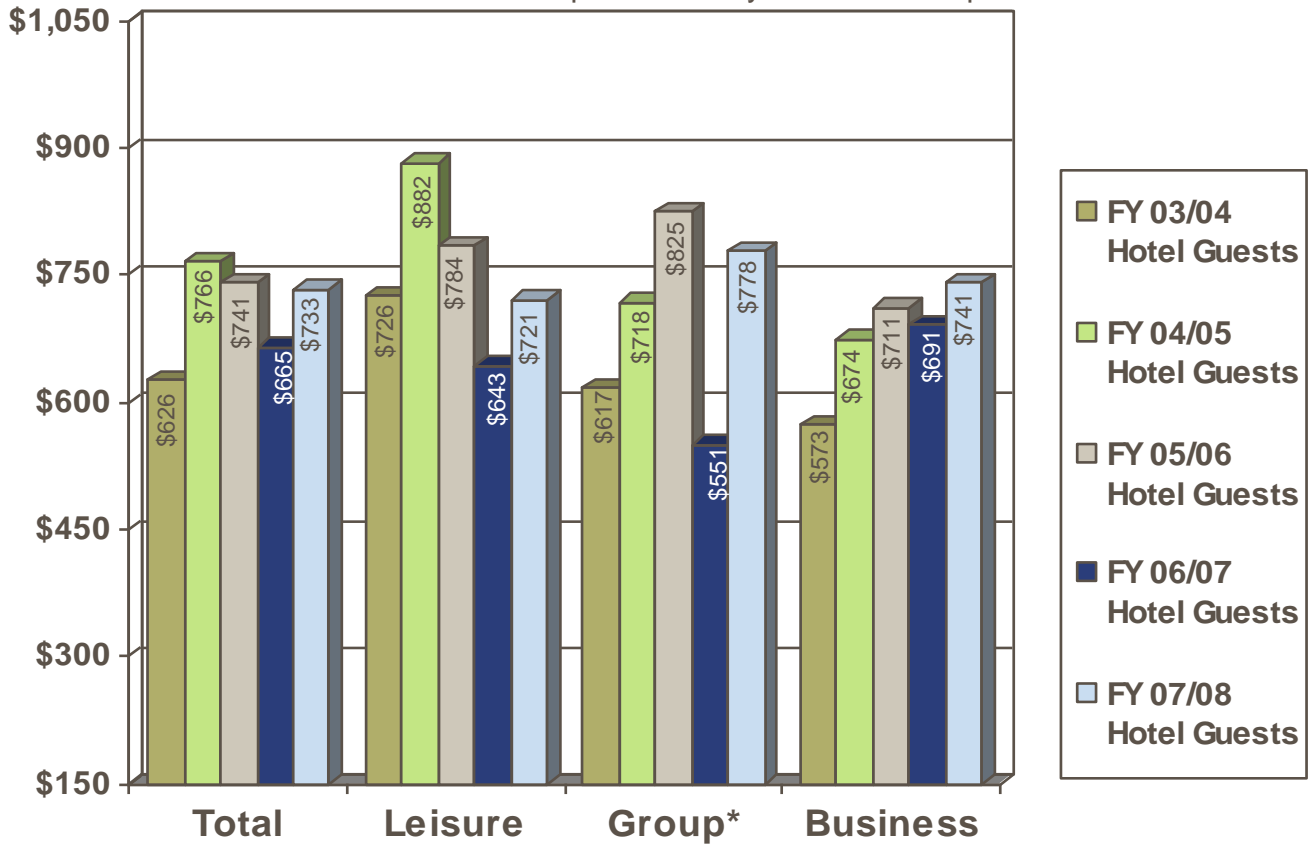


\*Starting in FY 2001/02, group includes Conference/Convention as well as Film/TV production.

Traveler Group	5 Year Average
Total	3.6
Leisure	4.3
Group	3.5
Business	3.0



Table 30  
Per Person Hotel Guest Expenditures by Traveler Group



\*Starting in FY 2001/02, group includes Conference/Convention as well as Film/TV production.

Traveler Group	5 Year Average
Total	\$706
Leisure	\$751
Group	\$698
Business	\$678



**Table 31  
PLANNING THE TRIP TO PALM BEACH COUNTY**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Reason for Trip</b>							
Conference/Convention/ Business Meeting	57.9%	56.3%	60.1%	58.2%	59.6%	1.4	58.4%
- Business Meeting	49.4%	48.7%	52.1%	50.6%	51.1%	0.5	50.4%
- Conference/Convention	7.1%	7.0%	6.3%	6.9%	8.3%	1.4	7.1%
- Other Business	1.4%	0.6%	1.7%	0.8%	0.2%	- 0.6	0.9%
Vacation/Pleasure	33.2%	35.3%	32.4%	33.3%	34.5%	1.2	33.7%
Sporting Event	1.7%	2.8%	3.1%	3.4%	1.7%	- 1.7	2.5%
Cultural Attraction	0.9%	0.5%	0.4%	0.8%	0.2%	- 0.6	0.6%
Film/TV Production	0.3%	0.0%	0.0%	0.5%	0.1%	- 0.4	0.2%
Other	6.1%	5.1%	4.0%	3.9%	3.8%	- 0.1	4.6%
<b>Who Made the Decision*</b>							
Employer	50.0%	50.4%	58.2%	54.3%	55.5%	1.2	53.7%
Head of Household/Other Adult	48.2%	47.5%	36.0%	37.1%	36.2%	- 0.9	41.0%
Family Living in PBC	N/A	N/A	6.2%	8.6%	8.3%	- 0.3	7.7%
Children influenced decision	1.8%	2.1%	1.6%	1.8%	1.1%	- 0.7	1.7%
<b>Advanced Planning</b>							
One Month or Less	53.6%	52.7%	56.9%	57.0%	58.0%	1.0	55.6%
Two to Three Months	21.5%	22.6%	22.9%	21.8%	21.1%	- 0.7	22.0%
More than Three Months	24.8%	24.7%	20.2%	21.2%	20.9%	- 0.3	22.4%

\* Starting in October 2005, multiple responses were accepted for the question "Who made the decision to come to PBC?". Also, the options "Female head of household, Male head of household and other traveling companion were merged into "Head of household/Other Adult" and the option "Family living in PBC was added".





**Table 32  
PLANNING THE TRIP TO PALM BEACH COUNTY**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Reasons for Selecting PBC over other destinations*</b>							
Work Related Trip	57.2%	56.3%	58.5%	56.6%	57.8%	1.2	57.3%
Visit Friends/Relatives	23.2%	21.4%	20.6%	19.5%	20.7%	1.2	21.1%
Previous visit	12.2%	13.3%	9.8%	11.4%	13.2%	1.8	12.0%
Special Event	12.0%	11.8%	5.6%	6.8%	7.3%	0.5	8.7%
Weather	11.2%	6.1%	7.2%	5.9%	5.9%	0.0	7.3%
Beaches	9.2%	5.0%	4.4%	5.9%	5.4%	- 0.5	6.0%
Convenient Flights	6.7%	5.1%	7.4%	5.8%	5.3%	- 0.5	6.1%
Friends/Relatives recommendation	15.8%	14.2%	3.1%	2.6%	2.6%	0.0	7.7%
Golf/Tennis/Recreation	3.5%	3.4%	3.2%	2.6%	2.4%	- 0.2	3.0%
Hotel Brochures/Websites	3.0%	3.3%	0.9%	1.8%	1.1%	- 0.7	2.0%
Compete in Sports Event/Competition	1.3%	1.0%	0.7%	1.0%	0.9%	- 0.1	1.0%
Attraction Brochures/Website	1.3%	1.0%	0.6%	1.1%	0.5%	- 0.6	0.9%
Spring Training	0.3%	0.7%	0.5%	0.6%	0.5%	- 0.1	0.5%
Attend a Sporting Event	1.8%	2.2%	1.8%	1.5%	0.4%	- 1.1	1.5%
Other Internet sources	5.4%	4.1%	0.7%	0.4%	0.4%	0.0	2.2%
Arts or Cultural Event	1.7%	1.5%	1.0%	0.8%	0.4%	- 0.4	1.1%
PBC-CVB	1.5%	0.7%	0.1%	0.3%	0.3%	0.0	0.6%
Travel Agency	1.9%	1.3%	0.2%	0.1%	0.2%	0.1	0.7%
State Tourist Agency	0.3%	0.3%	0.0%	0.1%	0.1%	0.0	0.2%
Spanish Language Media	N/A	N/A	0.1%	0.1%	0.0%	- 0.1	0.1%
Bus Tour	N/A	N/A	0.2%	0.1%	0.0%	- 0.1	0.1%
Media Coverage	3.1%	2.0%	0.1%	0.1%	0.0%	- 0.1	1.1%
Other	9.4%	11.1%	4.7%	5.1%	4.4%	- 0.7	6.9%

\*Multiple responses accepted



**Table 33  
BOOKING TOOLS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<u>Booked with Travel Agency</u>							
Yes	29.3%	24.4%	24.4%	24.6%	22.9%	- 1.7	25.1%
No	70.7%	75.6%	75.6%	75.4%	77.1%	1.7	74.9%
<u>Visit was part of a package (that may have included airfare, lodging, meals, rental car, etc..)</u>							
Yes	9.9%	10.1%	10.0%	6.5%	4.9%	- 1.6	8.3%
No	90.1%	89.9%	90.0%	93.5%	95.1%	1.6	91.7%
<u>Booked any part of this trip using the internet</u>							
Yes	42.0%	43.8%	47.8%	46.8%	47.1%	0.3	45.5%
No	58.0%	56.2%	52.2%	53.2%	52.9%	- 0.3	54.5%
<u>Areas Booked Using Internet (among those who used the internet)*</u>							
Hotel	59.9%	60.4%	60.4%	70.7%	75.3%	4.6	65.3%
Air	74.1%	76.5%	73.8%	69.3%	67.8%	- 1.5	72.3%
Car Rental	41.7%	44.3%	41.1%	39.5%	39.0%	- 0.5	41.1%
Tickets to Event	1.8%	1.1%	1.4%	1.3%	0.6%	- 0.7	1.2%
Other	2.2%	2.5%	5.6%	4.4%	3.4%	- 1.0	3.6%

\* Multiple responses accepted.



<b>Table 34 ACTIVITY PARTICIPATION</b>	<b>2003/04</b>	<b>2004/05</b>	<b>2005/06</b>	<b>2006/07</b>	<b>2007/08</b>	<b>CHANGE</b>	<b>5 YEAR AVERAGE</b>
<u>Participation in Specific Activities *</u>							
Restaurants	92.7%	94.5%	92.4%	93.6%	94.3%	0.7	93.5%
Shopping	39.2%	40.5%	35.1%	30.9%	31.0%	0.1	35.3%
Went to Beach	30.8%	35.0%	26.5%	26.6%	27.7%	1.1	29.3%
Swimming	9.8%**	10.2%**	15.3%	15.2%	16.8%	1.6	13.5%
Bars/Nightclubs	15.3%	14.4%	12.0%	12.1%	9.5%	- 2.6	12.7%
Visited Downtown West Palm Beach/City Place	14.5%	11.4%	10.3%	10.7%	9.0%	- 1.7	11.2%
Golf, Tennis	11.2%	12.5%	11.1%	9.4%	7.6%	- 1.8	10.4%
Visited Mizner Park – Boca Raton	10.2%	8.7%	7.1%	4.5%	5.6%	1.1	7.2%
Visited Downtown Delray Beach Attractions	9.5%	9.8%	7.2%	5.3%	5.5%	0.2	7.5%
Visited Wildlife Refuge	2.4%	3.0%	3.1%	2.5%	2.8%	0.3	2.8%
Museums, Art galleries	3.7%	3.7%	3.8%	2.1%	2.6%	0.5	3.2%
Visited Palm Beach/Worth Avenue***	N/A	N/A	N/A	0.3%	2.2%	1.9	1.3%
Boating	9.8%**	10.2%**	1.9%	1.9%	2.1%	0.2	5.2%
Attractions/Tours/Zoos	3.3%	3.8%	2.7%	1.7%	2.1%	0.4	2.7%
Visited Downtown at the Gardens	N/A	N/A	1.7%	1.8%	2.0%	0.2	1.8%
Attended a Sporting Event	1.8%	1.6%	2.2%	2.0%	1.8%	- 0.2	1.9%
Fishing	9.8%**	10.2%**	1.2%	1.5%	1.3%	- 0.2	4.8%
Visited Downtown Lake Worth	1.8%	1.5%	1.4%	1.1%	1.1%	0.0	1.4%
Performing Arts	1.7%	2.1%	1.8%	1.5%	1.1%	- 0.4	1.6%
Snorkeling	9.8%**	10.2%**	0.9%	0.9%	0.9%	0.0	4.5%
Visited Riviera Beach/Singer Island	2.6%	1.1%	1.4%	0.9%	0.9%	0.0	1.4%
Gambling Cruise	2.2%	1.8%	0.9%	0.8%	0.8%	0.0	1.3%
Horse Related Activity+	N/A	N/A	N/A	N/A	0.5%	N/A	0.5%
Diving	9.8%**	10.2%**	0.4%	0.4%	0.4%	0.0	4.2%
Surfing	9.8%**	10.2%**	0.4%	0.2%	0.2%	0.0	4.2%
Competed in Sports Event	1.3%	1.0%	0.7%	0.6%	0.2%	- 0.4	0.8%
Kite Surfing	9.8%**	10.2%**	0.1%	0.1%	0.2%	0.1	4.1%
Pari-Mutuels (dog-track)	0.7%	0.5%	0.4%	0.2%	0.2%	0.0	0.4%
Palm Beach County Convention Center	0.3%	0.8%	0.2%	0.3%	0.1%	- 0.2	0.3%
Other Activity	6.5%	7.2%	5.8%	6.3%	9.9%	3.6	7.1%

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

\*\*\* Added in August 2007 + Added in January 2008



**Table 35  
RETURN VISITS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<u>Plan to Return to PBC</u>							
Yes	82.6%	81.7%	81.2%	84.3%	83.7%	- 0.6	82.7%
No	2.6%	3.5%	3.0%	2.5%	3.0%	0.5	2.9%
Don't Know	14.8%	14.8%	15.8%	13.2%	13.2%	0.0	14.4%
<u>If no, why not? *</u>							
No business in the area	N/A	N/A	24.3%	17.3%	19.6%	2.3	20.4%
Too far	N/A	N/A	0.0%	7.1%	6.8%	- 0.3	4.6%
Don't like it here	N/A	N/A	0.0%	3.8%	6.0%	2.2	3.3%
Too expensive	N/A	N/A	3.0%	6.7%	3.5%	- 3.2	4.4%
Going to other places/I like changing destinations	N/A	N/A	9.8%	5.2%	3.2%	- 2.0	6.1%
Family moving away	N/A	N/A	2.7%	4.2%	2.2%	- 2.0	3.0%
Other	N/A	N/A	21.7%	22.1%	9.0%	- 13.1	17.6%
No reason/No answer	N/A	N/A	38.7%	33.6%	49.8%	16.2	40.7%
<u>When do you plan on returning to PBC?</u>							
Within the next 3 months	31.9%	29.7%	33.4%	34.8%	34.0%	- 0.8	32.8%
Within the next 6 months	14.8%	13.5%	10.4%	11.4%	10.9%	- 0.5	12.2%
Within the next year	22.6%	25.0%	21.4%	23.8%	24.5%	0.7	23.5%
Within the next few years	10.7%	9.8%	7.0%	4.9%	4.7%	- 0.2	7.4%
Don't Know	20.0%	21.9%	27.8%	25.0%	25.9%	0.9	24.1%

\*Multiple responses accepted, added in May 2006



**Table 36  
TRAVEL DETAILS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<u>Main Destination</u>							
Palm Beach County	90.1%	91.4%	91.1%	90.0%	91.5%	1.5	90.8%
Ft. Lauderdale	3.6%	3.8%	4.2%	4.4%	3.2%	- 1.2	3.8%
<u>First Trip to PBC</u>							
	28.5%	26.6%	25.8%	24.1%	26.5%	2.4	26.3%
<u>Type of Transportation*</u>							
Airplane	75.3%	74.7%	79.1%	73.2%	75.7%	2.5	75.6%
Car	23.9%	24.9%	26.2%	31.5%	29.4%	- 2.1	27.2%
Other	0.9%	0.4%	0.9%	0.8%	0.6%	- 0.2	0.7%

\* Multiple responses accepted starting in October 2005.



**Table 37  
THINGS LIKED BEST ABOUT THE TRIP TO PALM BEACH COUNTY**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
Climate/Weather	41.1%	40.4%	38.1%	38.7%	39.5%	0.8	39.6%
Beaches/Ocean	10.5%	12.0%	12.2%	12.6%	13.1%	0.5	12.1%
Beautiful Area	8.1%	9.4%	6.4%	8.4%	7.3%	- 1.1	7.9%
Nice People	4.4%	4.4%	4.3%	4.7%	4.6%	- 0.1	4.5%
Visiting Friends/Relatives	3.6%	4.0%	4.3%	4.0%	4.2%	0.2	4.0%
Relaxing Atmosphere	2.8%	1.8%	3.3%	2.8%	4.0%	1.2	2.9%
Cleanliness	3.8%	3.4%	4.0%	3.8%	3.3%	- 0.5	3.7%
Restaurants	2.1%	2.3%	2.7%	2.4%	2.5%	0.1	2.4%
Location	1.6%	1.9%	1.0%	1.5%	2.4%	0.9	1.7%
Hotel	4.7%	3.2%	4.2%	3.0%	2.3%	- 0.7	3.5%
Golf	1.1%	1.3%	1.9%	2.1%	1.4%	- 0.7	1.6%
Shopping	2.3%	2.4%	1.5%	2.1%	1.4%	- 0.7	1.9%
Everything	3.1%	1.9%	2.4%	1.9%	1.8%	- 0.1	2.2%
Other	10.8%	11.0%	12.6%	10.8%	10.7%	- 0.1	11.2%



**Table 38**  
**THINGS LIKED LEAST ABOUT THE TRIP TO PALM BEACH COUNTY**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
Traffic/Bad Drivers	29.6%	32.4%	35.0%	34.5%	30.0%	- 4.5	32.3%
Humidity/Poor Weather	18.4%	16.3%	18.9%	16.2%	19.1%	2.9	17.8%
Expensive	4.9%	6.1%	4.7%	5.9%	5.5%	- 0.4	5.4%
Crowded	2.7%	4.3%	2.8%	2.3%	3.3%	1.0	3.1%
Road Construction	7.9%	3.7%	3.6%	3.8%	3.2%	- 0.6	4.4%
Stay Was Too Short	2.3%	1.4%	2.3%	2.0%	2.4%	0.4	2.1%
Unfriendly People	1.2%	1.9%	1.4%	1.7%	2.3%	0.6	1.7%
Hotel	2.7%	3.3%	2.9%	2.1%	1.6%	- 0.5	2.5%
Other	15.1%	19.3%	19.3%	22.2%	26.1%	3.9	20.4%
Nothing Was Bad	15.6%	11.4%	9.8%	10.6%	7.9%	- 2.7	11.1%



**Table 39  
DEMOGRAPHIC CHARACTERISTICS OF VISITORS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Age</b>							
Under 35	19.5%	16.4%	17.1%	17.7%	16.3%	- 1.4	17.4%
35 to 54	54.8%	56.8%	54.7%	53.9%	54.8%	0.9	55.0%
55 to 64	17.7%	18.4%	20.0%	20.9%	20.6%	- 0.3	19.5%
65 +	8.2%	8.3%	8.3%	7.4%	8.3%	0.9	8.1%
<b>Description of traveling party* (Total)</b>							
Self only	30.0%	29.9%	32.7%	33.6%	39.3%	5.7	33.1%
Adult family members or friends	41.8%	44.1%	40.7%	40.6%	38.2%	- 2.4	41.1%
Business associates	26.1%	23.5%	25.6%	24.8%	21.4%	- 3.4	24.3%
Children under 12 years old	7.7%	8.9%	7.2%	7.5%	6.6%	- 0.9	7.6%
Grandchildren under 12 years old	0.8%	0.8%	0.5%	0.3%	0.1%	- 0.2	0.5%
<b>Description of traveling party* (Pleasure Hotel Guests)</b>							
Adult family members or friends	80.8%	81.7%	83.7%	82.4%	80.9%	- 1.5	81.9%
Self only	12.1%	9.8%	9.4%	11.8%	15.1%	3.3	11.6%
Children under 12 years old	14.6%	17.1%	15.5%	15.5%	14.4%	- 1.1	15.4%
Business associates	2.6%	2.1%	3.3%	3.4%	1.0%	- 2.4	2.5%
Grandchildren under 12 years old	1.6%	1.6%	1.3%	0.7%	0.3%	- 0.4	1.1%
<b>Description of traveling party* (Business Hotel Guests)</b>							
Self only	41.8%	44.6%	47.8%	48.1%	54.2%	6.1	47.3%
Business associates	42.3%	39.6%	40.1%	39.3%	33.9%	- 5.4	39.0%
Adult family members or friends	15.6%	16.2%	12.9%	12.7%	11.9%	- 0.8	13.9%
Children under 12 years old	3.1%	2.7%	1.8%	2.1%	2.0%	- 0.1	2.3%
Grandchildren under 12 years old	0.3%	0.2%	0.1%	0.0%	0.0%	0.0	0.1%

\* Multiple responses accepted





**Table 40  
DEMOGRAPHIC CHARACTERISTICS OF VISITORS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Occupation</b>							
Professional/Managerial	52.7%	53.1%	62.3%	63.6%	60.5%	- 3.1	58.4%
Sales	13.1%	16.3%	15.5%	14.7%	15.2%	0.5	15.0%
Retired	9.2%	9.2%	9.7%	8.5%	10.2%	1.7	9.4%
Technical	8.7%	6.6%	6.9%	7.1%	7.0%	- 0.1	7.3%
Student	1.6%	0.8%	1.2%	1.3%	1.0%	- 0.3	1.2%
Other	14.8%	13.9%	4.3%	4.8%	6.1%	1.3	8.8%
<b>Hispanic Origin</b>	N/A	N/A	5.3%	5.3%	5.7%	0.4	5.4%
<b>Ethnicity</b>							
White/Caucasian	90.7%	92.7%	92.4%	91.9%	91.6%	- 0.3	91.9%
African-American	5.8%	4.7%	4.2%	5.5%	5.5%	0.0	5.1%
Asian	3.3%	2.5%	3.1%	2.3%	2.6%	0.3	2.8%
Other	0.3%	0.1%	0.3%	0.2%	0.3%	0.1	0.2%



**Table 41  
DEMOGRAPHIC CHARACTERISTICS OF VISITORS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Income</b>							
Under \$45,000	6.8%	4.8%	3.8%	4.9%	2.8%	- 2.1	4.6%
\$45,000 to \$64,999	10.4%	8.9%	9.6%	8.8%	7.6%	- 1.2	9.1%
\$65,000 to \$99,999	27.5%	23.7%	22.3%	21.8%	22.1%	0.3	23.5%
\$100,000 to \$200,000	40.1%	38.6%	41.0%	41.2%	42.7%	1.5	40.7%
More than \$200,000	15.2%	24.0%	23.2%	23.3%	24.9%	1.6	22.1%
<b>Gender</b>							
Male	57.5%	56.3%	58.4%	58.7%	60.4%	1.7	58.3%
Female	42.5%	43.7%	41.6%	41.3%	39.6%	- 1.7	41.7%



**Table 42  
PLACE OF ORIGIN OF VISITORS**

	2003/04	2004/05	2005/06	2006/07	2007/08	CHANGE	5 YEAR AVERAGE
<b>Domestic</b>	<b>91.2%</b>	<b>90.7%</b>	<b>91.0%</b>	<b>91.7%</b>	<b>89.1%</b>	<b>- 2.6</b>	<b>90.7%</b>
Florida	17.3%	17.2%	17.9%	23.8%	20.6%	- 3.2	19.4%
Southeast (excluding Florida)	16.9%	15.7%	18.6%	16.4%	18.1%	1.7	17.1%
Midwest	14.2%	15.5%	15.2%	15.1%	13.0%	- 2.1	14.6%
Middle Atlantic	14.0%	14.1%	13.6%	13.8%	12.3%	- 1.5	13.6%
New York	13.7%	12.0%	11.6%	8.9%	10.8%	1.9	11.4%
New England	7.1%	8.4%	6.2%	7.2%	7.2%	0.0	7.2%
Far West*	8.0%	7.8%	7.8%	6.7%	7.0%	0.3	7.5%
Region Unknown	0.0%	0.1%	0.0%	0.0%	0.0%	0.0	0.0%
<b>International</b>	<b>8.8%</b>	<b>9.3%</b>	<b>9.0%</b>	<b>8.3%</b>	<b>10.9%</b>	<b>2.6</b>	<b>9.3%</b>
Europe	3.4%	4.8%	4.7%	3.7%	5.1%	1.4	4.3%
- England/UK	1.6%	2.7%	2.2%	1.6%	1.9%	0.3	2.0%
- Germany	0.5%	0.7%	0.8%	0.5%	0.8%	0.3	0.7%
Canada	2.3%	2.3%	2.0%	1.5%	2.7%	1.2	2.2%
Latin America	2.3%	1.6%	1.5%	2.2%	2.0%	- 0.2	1.9%
Australia/Asia	0.5%	0.4%	0.5%	0.6%	0.6%	0.0	0.5%
Middle-East	0.1%	0.2%	0.3%	0.1%	0.5%	0.4	0.2%
Africa	0.1%	0.0%	0.0%	0.1%	0.1%	0.0	0.1%

\* Please note: The Far West region includes the following states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming.



**Table 43**  
**ESTIMATED NUMBER OF HOTEL GUESTS BY PLACE OF ORIGIN**

	FY Q1 Oct – Dec 2007	FY Q2 Jan – Mar 2008	FY Q3 Apr – June 2008	FY Q4 July – Sept 2008	FYTD 2007 – 2008
<b>Domestic</b>	<b>442,284</b>	<b>547,182</b>	<b>475,720</b>	<b>382,550</b>	<b>1,856,482</b>
Florida	111,254	74,430	126,475	109,131	430,109
Mid-Atlantic	62,111	91,606	52,459	52,193	257,215
New York	52,555	76,884	55,333	40,331	224,620
New England	47,095	42,531	34,493	26,096	150,219
Southeast	77,127	103,875	104,917	84,220	378,382
Midwest	55,968	112,054	63,238	45,669	270,678
Far West	36,174	45,803	38,805	25,503	145,968
<b>International</b>	<b>59,381</b>	<b>53,164</b>	<b>55,333</b>	<b>54,565</b>	<b>227,454</b>
Europe	32,762	20,448	22,277	25,503	105,579
- Germany	4,095	1,636	5,030	5,338	16,297
- England/UK	18,429	8,179	7,905	4,745	40,389
Canada	10,238	19,630	15,809	10,676	55,978
Middle East	2,048	818	5,030	2,372	9,920
Australia/Asia	4,095	4,907	2,156	1,186	11,337
Africa	0	0	0	1,779	2,126
Latin America/Caribbean	10,238	7,631	10,061	13,048	42,515
<b>Total Hotel Guests</b>	<b>501,665</b>	<b>600,346</b>	<b>531,053</b>	<b>436,522</b>	<b>2,083,936</b>



**Table 44  
PLEASURE VS. BUSINESS BY SELECTED PLACE OF ORIGIN**

	<u>FYTD 2003/04</u>	<u>FYTD 2004/05</u>	<u>FYTD 2005/06</u>	<u>FYTD 2006/07</u>	<u>FYTD 2007/08</u>	<u>Change</u>	<u>5 YEAR AVERAGE</u>
<b><u>Florida</u></b>	<b>17.3%</b>	<b>17.2%</b>	<b>17.9%</b>	<b>23.8%</b>	<b>20.6%</b>	<b>- 3.2</b>	19.4%
Business	12.5%	11.6%	12.7%	15.4%	13.3%	- 2.1	13.1%
Pleasure	4.4%	5.3%	5.0%	8.0%	7.1%	- 0.9	6.0%
<b><u>Southeast (excluding Florida)</u></b>	<b>16.9%</b>	<b>15.7%</b>	<b>18.6%</b>	<b>16.4%</b>	<b>18.1%</b>	<b>1.7</b>	17.1%
Business	11.1%	11.0%	13.9%	11.6%	13.4%	1.8	12.2%
Pleasure	5.5%	4.5%	4.6%	4.7%	4.6%	- 0.1	4.8%
<b><u>Midwest</u></b>	<b>14.2%</b>	<b>15.5%</b>	<b>15.2%</b>	<b>15.1%</b>	<b>13.0%</b>	<b>- 2.1</b>	14.6%
Business	9.1%	9.3%	9.4%	9.1%	8.2%	- 0.9	9.0%
Pleasure	5.0%	6.2%	5.7%	5.9%	4.7%	- 1.2	5.5%
<b><u>Mid Atlantic</u></b>	<b>14.0%</b>	<b>14.1%</b>	<b>13.6%</b>	<b>13.8%</b>	<b>12.3%</b>	<b>- 1.5</b>	13.6%
Business	7.0%	5.7%	6.4%	6.6%	5.9%	- 0.7	6.3%
Pleasure	6.9%	8.2%	7.1%	7.0%	6.3%	- 0.7	7.1%
<b><u>New York</u></b>	<b>13.7%</b>	<b>12.0%</b>	<b>11.6%</b>	<b>8.9%</b>	<b>10.8%</b>	<b>1.9</b>	11.4%
Business	5.4%	4.3%	4.0%	3.6%	4.6%	1.0	4.4%
Pleasure	8.1%	7.6%	7.5%	5.2%	6.1%	0.9	6.9%
<b><u>New England</u></b>	<b>7.1%</b>	<b>8.4%</b>	<b>6.2%</b>	<b>7.2%</b>	<b>7.2%</b>	<b>0.0</b>	7.2%
Business	3.9%	4.1%	2.9%	3.6%	3.4%	- 0.2	3.6%
Pleasure	3.1%	4.2%	3.2%	3.5%	3.8%	0.3	3.6%
<b><u>Far West</u></b>	<b>8.0%</b>	<b>7.8%</b>	<b>7.8%</b>	<b>6.7%</b>	<b>7.0%</b>	<b>0.3</b>	7.5%
Business	5.2%	5.8%	6.2%	4.1%	4.9%	0.8	5.2%
Pleasure	2.7%	2.0%	1.5%	2.5%	2.0%	- 0.5	2.1%



**Table 45**  
**ESTIMATED NUMBER OF HOTEL GUESTS BY MONTH AND FISCAL YEAR\***  
**FISCAL YEAR 2003/04 THROUGH 2007/08**

	2003/04	2004/05	2005/06	2006/07	2007/08	5 YEAR AVERAGE
October	174,604	209,111	174,451	179,304	165,958	180,686
November	154,986	171,572	236,465	157,976	166,206	177,441
December	191,324	191,254	185,917	178,856	150,171	179,504
January	204,251	183,476	204,363	213,212	191,699	199,400
February	160,081**	176,446	186,071	192,706	197,339**	182,529**
March	196,038	186,489	158,268	268,364	217,445	205,321
April	230,061	191,411	185,647	234,411	217,767	211,859
May	182,501	150,999	196,426	212,421	155,696	179,609
June	205,551	202,342	223,262	226,477	168,169	205,160
July	183,381	155,596	170,737	180,271	188,946	175,786
August	190,688	172,554	161,592	190,125	150,631	173,118
September	162,949	158,862	155,031	120,176	113,909	142,185

\* The monthly figures presented in this table are based on monthly data and are thus subject to greater variability. The quarterly figures presented in other tables in this report are based on a quarterly aggregate of the data, and the total count is based on a summation of the monthly data. As such, the total of the quarterly figures will vary from the total count based on the monthly data.

\*\* Adjusted for leap year.