



**Report on Palm Beach County Tourism
Fiscal Year 2008/2009
(October 2008 – September 2009)**

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Tourist Development Council of Palm Beach County

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**Table 1
SUMMARY OF RESEARCH STATISTICS
FISCAL YEAR 2004/05 THROUGH FISCAL YEAR 2008/09**

	2004/05	2005/06	2006/07	2007/08	2008/09	FY 08/09 CHANGE	5 YEAR AVERAGE
Estimated Hotel Guests	2,150,112*	2,238,230*	2,354,297*	2,083,936*	1,808,480*	- 275,456	2,127,011
Visitor/Guest Multiplier ¹	2	2	2	2	2	N/A	2
Estimated Number of Visitors	4,300,224*	4,476,460*	4,708,594*	4,167,872*	3,616,960*	- 550,912	4,254,022
Estimated Hotel Guest Expenditures (In Millions)	\$1,647	\$1,659	\$1,566	\$1,528	\$1,277	- 251	\$1,535
Money Spent Per Hotel Guest	\$766	\$741	\$665	\$733	\$706	- 27	\$722
Bed Tax Collections (Gross) ⁴	\$22,511,343	\$23,515,547	\$26,818,069	\$27,813,718	\$22,346,491	- 5,467,227	\$24,601,034
Occupancy Rate	76.0%	71.2%	67.4%	65.2%	59.1%	- 6.1	67.8%
Average Daily Room Rate ²	\$148.86	\$147.16	\$148.24	\$164.07	\$141.97	- 22.10	\$150.06
Available Room Night Inventory	5,352,902**	5,378,710*	5,386,713*	5,373,706*	5,432,003*	58,297	5,384,807
Occupied Room Nights(FYTD) ³	4,057,276**	3,829,804*	3,628,164*	3,499,289*	3,206,236*	- 293,053	3,644,154
Average Party Size	2.1**	2.1**	2.1**	2.0**	2.0**	0.0	2.1
Nights in Hotel/Motel	4.0	3.6	3.3	3.4	3.6	0.2	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 2009

Introduction

- Profile Marketing Research was awarded the Palm Beach County Tourist Development Council's Tourism Study for Fiscal Year 2008/2009.
- 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 2008 and September 2009.
- The Fiscal Year 2008/2009 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, staying in select and varied hotels representing the three Palm Beach County regions for an annual sample of 3000. This provides an error interval of no greater than + or - 1.79% at the 95% level of confidence.
- Results are shown for Fiscal Year 2008/2009 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 2009 Summary

Occupancy Rates

- In FY 2008/09, the average occupancy rate among responding Palm Beach County hotel managers decreased by 6.1 percentage points relative to the prior fiscal year (from 65.2% in FY 2007/08 to 59.1% in FY 2008/09). (table 1, pg. 4)
 - As seen in prior years, the average occupancy rates were highest in February (72.1%) and March (68.3%) and lowest in September (45.3%). (table 11, pg. 26)
- Managers of hotels in the Central region reported the highest average occupancy rate in FY 2008/09 at 62.1%, compared to 58.1% cited by hotel managers in the Northern region and 56.9% among hotel managers in the Southern region. (table 5, pg. 20)
 - For the fourth consecutive year, all three regions of Palm Beach County experienced lower average occupancy rates compared to the prior fiscal year (Southern – down 7.4 percentage points from 64.3% to 56.9%; Northern – down 5.8 percentage points from 63.9% to 58.1%; Central – down 4.7 percentage points from 66.8% to 62.1%). (table 5, pg. 20)
- Managers of smaller properties (50-100 rooms) cited occupancy rates (50.2%) lower than that of larger properties (101+ rooms) (60.9%). (table 5 pg. 20)
 - In FY 2008/09, occupancy rates declined among both smaller (50-100 rooms) properties and larger (101+ rooms) properties when compared to the prior fiscal year (Smaller properties – from 56.3% to 50.2%, a decrease of 6.1 percentage points; Larger properties from 66.8% to 60.9%; a decrease of 5.9 percentage points). (table 5, pg. 20)
- In FY 2008/09, fewer hotel room nights were occupied by conference/convention groups in all participating PBC hotels relative to last year (from 1,017,002 to 826,191, an 18.8 percentage point decrease). The number of room nights occupied by conference/convention groups at hotels specifically designated as convention hotels also decreased (from 667,089 to 551,298, a 17.4 percentage point decrease). (table 12, pg. 27)
- For the second consecutive year, the estimated number of guests who stayed in Palm Beach County hotels decreased when compared to the prior fiscal year (from 2,083,936* in FY 2007/08 to 1,808,480 in FY 2008/09, a decrease of 13.2 percentage points). (table 17, pg. 32)
 - Hotel visitors' estimated total expenditures during FY 2008/09 (~\$1.28 billion) have declined by 16.4 percentage points relative to the prior fiscal year (~\$1.53 billion). (table 17, pg.32)
 - The estimated number of Palm Beach County visitors decreased by 13.2 percentage points in FY 2008/09 (3,616,960*) compared to FY 2007/08 (4,167,872*). (table 1, pg. 4)
- In FY 2008/09, the average number of nights in hotels/motels (3.6) increased slightly when compared to FY 2007/08 (3.4). However, the number of hotel guests decreased by 275,456 in FY 2008/09 compared to the prior year (from 2,083,936* to 1,808,480*). As such, the number of occupied room nights declined by 293,053 (from 3,499,289* in FY 2007/08 to 3,206,236* in FY 2008/09). (table 1, pg. 4)

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



Fiscal Year 2009 Summary

Average Daily Room Rate (ADR)

- The Average Daily Room Rate in FY 2008/09 (\$141.97) decreased relative to the previous four fiscal years (\$148.86 in FY 2004/05, \$147.16 in FY 2005/06, \$148.24 in FY 2006/07, \$164.07 in FY 2007/08) . (table 1, pg. 4)
- The highest Average Daily Room Rate was noted in February (\$199.44) and the lowest was in August (\$95.03). (table 10, pg. 25)

Characteristics of Stay

- The average party size* of surveyed PBC hotel guests in FY 2008/09 was 2.0, comparable to the prior year (2.0). (table 15, pg. 30)
- Surveyed hotel guests spent an average of 3.6 nights in Palm Beach County hotels during FY 2008/09. (table 15, pg. 30)
- As seen in prior years, business travelers (55%) outnumbered all other types of travelers in FY 2008/09, including vacationers (36%). (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 2009

Occupancy Rates

- In fiscal year 2008/09, the average occupancy rate of participating Palm Beach County hotels was 59.1%, a 6.1 percentage point decline compared to FY 2007/08 (65.2%). (table 18, pg. 34)
 - In FY 2008/09, relative to the prior year, occupancy rates declined; among smaller hotels (50-100 rooms) occupancy rates decreased by 6.1 percentage points (from 56.3% to 50.2%), while occupancy rates among larger hotels (101+ rooms) decreased by 5.9 percentage points (from 66.8% to 60.9%). (table 18 pg. 34)
 - Managers at larger properties (101+ rooms) reported an average occupancy rate 10.7 percentage points higher than managers at smaller properties (50-100 rooms) in FY 2008/09 (50.2% smaller hotels, 60.9% larger hotels). (table 18 pg. 34)
 - During FY 2008/09 the occupancy rate reached its highest level in February (72.1%) and March (68.3%) and dropped to its lowest in September (45.3%); 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 2008/09 (62.1%), while properties in the Northern and Southern regions experienced occupancy rates comparable to each other (58.1% for the Northern region and 56.9% for the Southern region). (table 18, pg. 34)
 - Participating hotels from all three regions of PBC experienced decreases in occupancy rate relative to last year (Southern – from 64.3% to 56.9%, a decrease of 7.4 percentage points; Northern – from 63.9% to 58.1%, a decrease of 5.8 percentage points; Central – from 66.8% to 62.1%, a decrease of 4.7 percentage points). (table 18 pg. 34)
- The total number of room nights* occupied in FY 2008/09 was 3,206,236 – 293,053 or 8.4 percentage points fewer than in the prior fiscal year (3,499,289). (table 18, pg. 34)
- In FY 2008/09, the percentage of group bookings among all Palm Beach County hotels decreased by 3.3 percentage points relative to last year (from 29.0% to 25.7%); the percentage of group bookings among hotels specifically designated as convention hotels decreased by 3.9 percentage points (from 32.5% to 28.6%). (table 22 pg. 38)
- The number of room nights occupied by group bookings in all PBC hotels experienced a large decrease relative to last year (down 18.8 percentage points, from 1,017,002 to 826,191), as did the number of room nights occupied by group bookings in hotels specifically designated as convention hotels (down 17.4 percentage points, from 667,089 to 551,298). (table 22, pg. 38)
- In FY 2008/09, the percentage of guests who traveled to PBC from outside the U.S. remained at parity with the prior fiscal year (both 6.2%). (table 25, pg. 41)
 - As seen in the prior fiscal years, in FY 2008/09 smaller properties (50-100 rooms) continued to experience a higher percentage of international guests (9.9%) than larger properties (101+ rooms) (5.4%). (table 25, pg. 41)
 - In prior years, hotels in the Southern region experienced the highest percentage of international guests, however, in FY 2008/09 property managers in the Central region reported the highest percentage of international guests (6.7%), compared to 6.5% in the Southern region and 3.4% in the Northern region. (table 25, pg. 41)

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



Property Manager Survey: Fiscal Year 2009

Average Daily Room Rate (ADR)

- **The Average Daily Room Rate (ADR) in FY 2008/09 was \$141.97; 13.5 percentage points (\$22.10) lower than FY 2007/08 (\$164.07).** (table 20, pg. 36)
 - The ADR reported by managers at smaller hotels (50-100 rooms) was \$131.05. This represents a decrease of 18.3 percentage points (\$29.27) compared to FY 2007/08 (\$160.32), (table 20, pg. 36)
 - Managers from larger properties (101+ rooms) cited an ADR of \$144.31, which is a decrease of 12.7 percentage points (\$20.97) compared to the prior fiscal year (\$165.28). (table 20, pg. 36)
 - In FY 2008/09, property managers reported the highest ADR for the month of February (\$199.44) and the lowest for the month of August (\$95.03). (table 21 pg. 37)



Hotel Visitor Survey Summary



Hotel Visitor Survey: Fiscal Year 2009

Characteristics of Stay

- During the 2008/09 fiscal year the average party size* of Palm Beach County hotel guests was 2.0. PBC surveyed visitors spent an average of 3.6 nights in a hotel, and occupied, on average, 1.2 rooms per night, all comparable with recent years. (table 26, pg. 43)
- As in prior years, most surveyed visitors in PBC (55.0%) traveled for business (conference/convention/business meeting) in FY 2008/09. Vacationers comprised more than one-third of surveyed guests who visited Palm Beach County during this same period (36.1%). (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 2008/09 fiscal year when asked why they chose Palm Beach County rather than another destination (52.9%). (table 32, pg. 49)
 - 'Visiting friends/relatives' (22.3%) and 'Previous visit' (16.0%) were other popular reasons for selecting Palm Beach County rather than another destination. (table 32, pg. 49)
- During the 2008/09 fiscal year, one-half of surveyed hotel guests claimed their employer was the primary decision maker regarding the trip to Palm Beach County (50.8%), a decrease of 4.7 percentage points compared with the previous fiscal year (55.5%). (table 31, pg. 48)
 - More than four-in-ten surveyed hotel guests claimed that the decision to travel to Palm Beach County was made by the 'Head of Household/Other adult' (43.1%), an increase of 6.9 percentage points compared to last year (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 (58.5%), at parity with FY 2007/08 (58.0%). (table 31, pg. 48)

Booking a Trip to Palm Beach County

- Slightly fewer than one-quarter of visitors surveyed during FY 2008/09 used a Travel Agency to book any part of the trip to Palm Beach County (23.5%), at parity with FY 2007/08 (22.9%). (table 33, pg. 50)
- In FY 2008/09, more surveyed visitors used the Internet to book any part of their trip (50.7%) than in the previous four years (FY 2004/05 – 43.8%, FY 2005/06 – 47.8%, FY 2006/07 – 46.8%, FY 2007/08 – 47.1%). (table 33, pg. 50)
 - Starting in FY 2005/06, the percentage of surveyed guests using the Internet to book hotel reservations has increased in each consecutive year, reaching its highest point in FY 2008/09 (80.9%) (FY 2004/05 – 60.4%, FY 2005/06 – 60.4%, FY 2006/07 – 70.7%, FY 2007/08 – 75.3%). (table 33, pg. 50)
 - Conversely, the percentage of surveyed guests reserving airfare via the Internet has decreased in subsequent years, starting in FY 2004/05 (76.5%) and reaching its lowest point in FY 2008/09 (60.5%) (FY 2005/06 – 73.8%, FY 2006/07 – 69.3%, FY 2007/08 – 67.8%). The percentage of surveyed guests booking car rentals online has decreased during this same time period as well (FY 2004/05 – 44.3%, FY 2005/06 – 41.1%, FY 2006/07 – 39.5%, FY 2007/08 – 39.0%, FY 2008/09 – 31.9%). (table 33, pg. 50)
 - During the 2008/09 fiscal year, 5.3% of hotel guests reported that their trip to PBC was part of a package (that may have included airfare, lodging, meals, rental car, etc), at parity with the prior fiscal year (4.9%). (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 2009

Visitor Expenditures

- **The average per party* expenditure during FY 2008/09 was \$1,411 - a \$54 (3.7%) decrease compared to the prior year (\$1,465).** (table 27, pg. 44)
 - Compared to last fiscal year, increases occurred in average expenditures for 'Entertainment/Recreation' (from \$34 to \$47, up 38.2%), 'Restaurant/Bar' (from \$377 to \$389, up 3.2%), and 'Local Travel' (from \$143 to \$144, up 0.7%). Decreases were seen in expenditures related to 'Gifts/Shopping' (from \$133 to \$115, down 13.5%) and 'Lodging' (from \$779 to \$716, down 8.1%). (table 27, pg. 44)
- **The average per person expenditure was \$706 – 3.7% lower than in FY 2007/08 (\$733). The average per person/day expenditure decreased by 9.3% compared to the prior fiscal year (from \$216 to \$196).** (table 27, pg. 44)
- **On average, leisure travelers spent \$1,800 per party and business travelers spent \$1,187 per party while in Palm Beach County.** (table 28, pg. 45)
 - In FY 2008/09, both leisure and business travelers' per party expenditures were at parity with the prior fiscal year (leisure – from \$1,802 to \$1,800; business – from \$1,186 to \$1,187); however, there were large decreases in per party expenditures of group travelers (conference/convention/film/TV production) (down 26.3%, from \$1,400 to \$1,032) and of guests coming to PBC for a sporting event (down 28.1%, from \$2,741 to \$1,972). (table 28, pg. 45)
 - The average party size* of PBC leisure guests was 2.5 and for business guests the average was 1.5. Leisure visitors spent an average of 4.4 nights in PBC hotels/motels, while business travelers spent an average of 3.1 nights in hotels/motels. (table 28, pg. 45)

Characteristics of Visitors

- **As in previous years, most PBC hotel guests surveyed during FY 2008/09 were 35 to 54 years old (52.5%), White/Caucasian (91.8%), worked in professional/managerial occupations (61.4%), and claimed household incomes of \$100,000 or more (66.4%).** (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 (78.9%). Most business travelers traveled alone (56.6%) or with business associates (30.2%).** (table 39, pg. 56)

Travel Details

- **More than one-quarter of visitors surveyed during FY 2008/09 were visiting Palm Beach County for the first time (25.6%), at parity with FY 2007/08 (26.5%).** (table 36, pg. 53)
- **Approximately nine-in-ten surveyed visitors reported that their main destination was Palm Beach County in FY 2008/09 (92.4%), comparable to prior fiscal years (FY 2004/05 – 91.4%, FY 2005/06 – 91.1%, FY 2006/07 – 90.0%, FY 2007/08 – 91.5%).** (table 36, pg. 53)
- **In FY 2008/09, fewer surveyed guests traveled to PBC by airplane (71.0%) than in any of the four previous years (FY 2004/05 – 74.7%, FY 2005/06 – 79.1%, FY 2006/07 – 73.2%, FY 2007/08 – 75.7%). Coinciding with such, a greater percentage of surveyed guests traveled to PBC by car (33.3%) than in any of the four previous years (FY 2004/05 – 24.9%, FY 2005/06 – 26.2%, FY 2006/07 – 31.5%, FY 2007/08 – 29.4%).** (table 36, pg. 53)
- **Nearly nine-in-ten surveyed hotel guests were domestic travelers in FY 2008/09 (89.2%), which is at parity with the prior fiscal year (89.1%).** (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 2009

Attitudes toward Palm Beach County – Likes/Dislikes About Trip

- **Comparable to previous fiscal years, surveyed hotel guests in the 2008/09 fiscal year continued to mention ‘Climate/Weather’ as the aspect of the trip to Palm Beach County they liked the best (36.0%).** (table 37, pg. 54)
 - Other facets surveyed visitors liked included ‘Beaches/Ocean’ (12.5%) and ‘Beautiful Area’ (8.0%). (table 37, pg. 54)
- **‘Traffic/bad drivers’ continued to be the most disliked aspect of Palm Beach County, mentioned by one-quarter of surveyed visitors (26.2%). ‘Humidity/poor weather’ followed with 19.9% 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 2008/09 continued to report dining at area restaurants (96.1%). Other popular activities included shopping (32.0%), going to the beach (29.1%), swimming (20.0%), and going to bars/nightclubs (10.8%).** (table 34, pg. 51)
 - When compared to the previous fiscal year, activities that have increased in popularity in FY 2008/09 include swimming (from 16.8% to 20.0%), visiting downtown Delray Beach attractions (from 5.5% to 8.3%), and golf/tennis (from 7.6% to 10.1%). All other activities remained at parity with FY 2007/08. (table 34, pg. 51)
 - Going to the beach (14.5%) was the most frequently mentioned activity that surveyed visitors did on a recent trip that they wished they could do in PBC. (table 46, pg. 63)

Return Visits

- **Most surveyed guests claimed to have plans to return to Palm Beach County for another visit (86.7%, a slight increase relative to FY 2007/08, 83.7%).** (table 35, pg. 52)
 - Among those who plan to visit PBC again, exactly seven-in-ten plan to do so within the next year (70.0%). (table 35, pg. 52)
 - Only 2.5% of surveyed guests claimed that they have no plans to visit PBC again in the future; many guests did not provide a reason why not (32.6%). Among those who provided a response, ‘no business in the area’ (14.4%) and ‘I like changing destinations’ (13.0%) were the top mentions. (table 35, pg. 52)

Vacation/Leisure Visitors

- When asked about their last vacation destination, nearly two-thirds (65.7%) of leisure travelers traveled domestically for their last vacation; locations in Florida (25.9%) and the Far West (16.2%) were the most visited. (table 47, pg. 64)
- One-third (33.5%) of surveyed leisure visitors stated they traveled internationally for their previous vacation. Locations in Latin America/Caribbean (15.8%) and Europe (11.6%) were the top cited international destinations. (table 47, pg. 64)
- When planning their trip, two-thirds of responding leisure travelers (65.5%) considered travelling to other locations within the United States, and most considered other locations in Florida (62.9%). Nearly one-third of responding leisure travelers (31.4%) didn’t consider any other destination. (table 48, pg. 65)
- At least three-quarters of responding leisure visitors claimed that PBC was about the same or better than their most recent vacation destination in terms of:
 - Being appreciated as a tourist or visitor (92.2%)
 - Being a great place to go again and again (91.7%)
 - Being a good value (91.0%)
 - Being able to always find a new place to see or a new thing to do (89.0%)
 - Being great for discovering nature-based activities/ecotourism (88.8%)
 - Being great for museums and other cultural activities (84.4%)
 - Being great for historical sights and places (77.9%)

(table 49, pg. 66)



Summary Tables



**Table 2
HOTEL OCCUPANCY IN PALM BEACH COUNTY
FISCAL YEAR 2004/05 THROUGH FISCAL YEAR 2008/09**

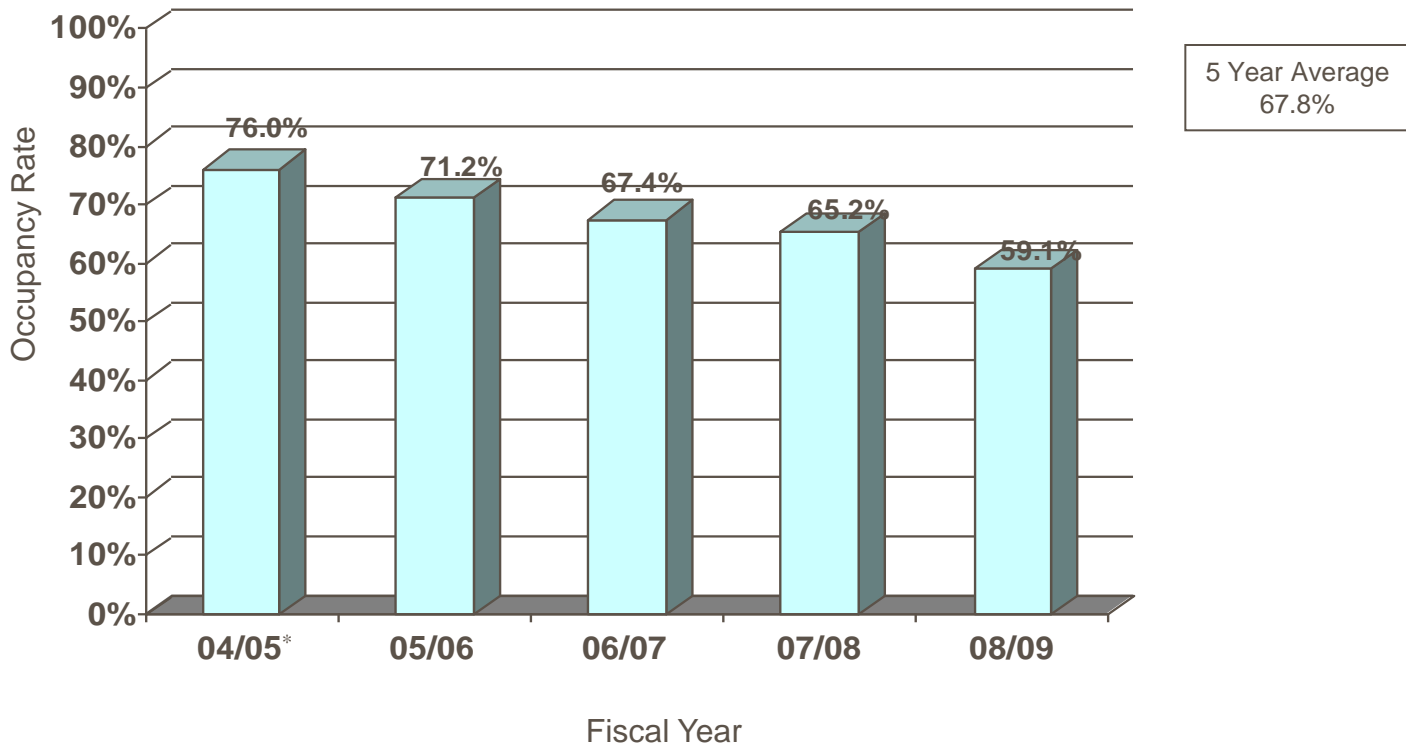
FISCAL YEAR	HOTEL OCCUPANCY RATE	% POINT CHANGE FY TO FY	ROOM NIGHTS OCCUPIED	% CHANGE FY TO FY	AVAILABLE INVENTORY*	% CHANGE FY TO FY
2004/05	76.0%	5.1%	4,057,276**	1.4%	5,352,902**	- 5.1%
2005/06	71.2%	- 4.8%	3,829,804*	- 5.6%	5,378,710*	0.5%
2006/07	67.4%	- 3.8%	3,628,164*	- 5.3%	5,386,713*	0.1%
2007/08	65.2%	- 2.2%	3,499,289*	- 3.6%	5,373,706*	- 0.2%
2008/09	59.1%	- 6.1%	3,206,236*	- 8.4%	5,432,003*	1.1%
5 YEAR AVERAGE	67.8%	- 2.4%	3,644,154*	- 4.3%	5,384,807	- 0.7%

* 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.



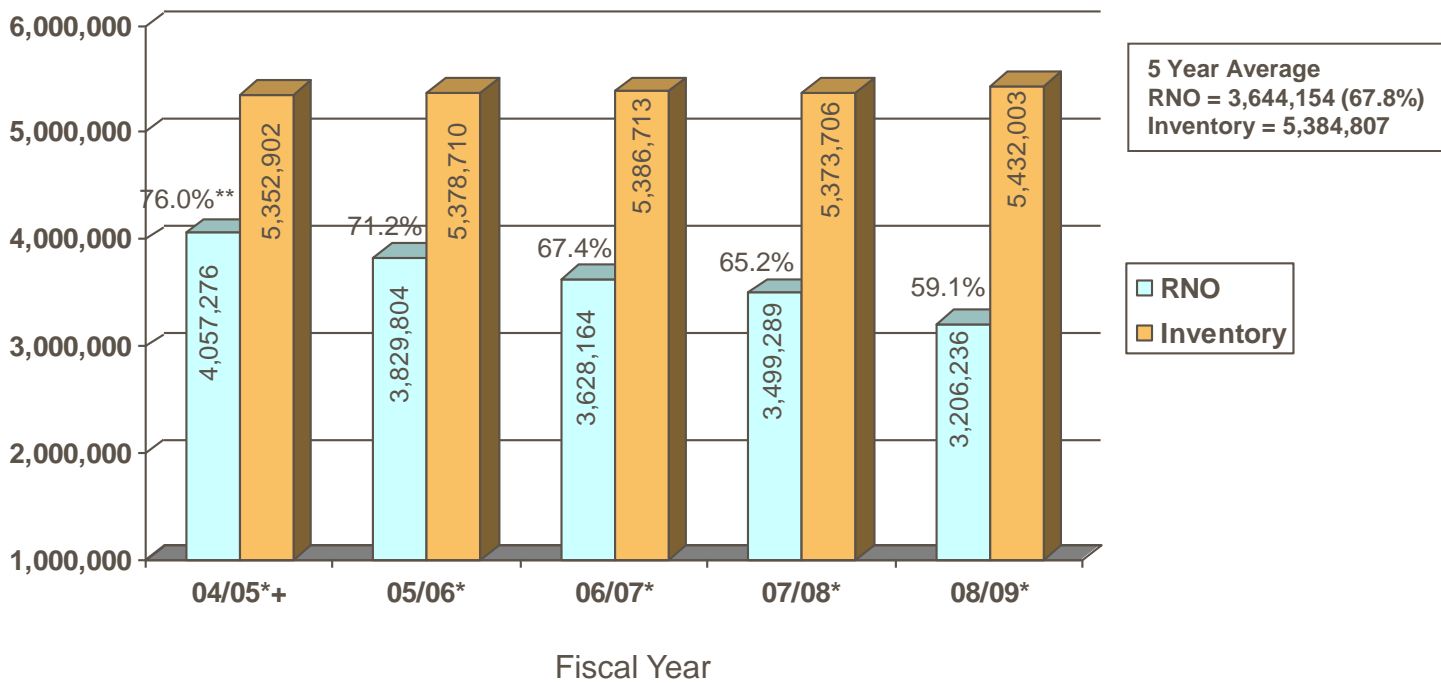
Table 3
Annual Hotel Occupancy Rate Trends



*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 2004/05 THROUGH FISCAL YEAR 2008/09**

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
Total Occupancy Rate	76.0%	71.2%	67.4%	65.2%	59.1%	67.8%
Hotel Size						
50 - 100 Rooms	74.2%	71.6%	63.9%	56.3%	50.2%	63.2%
101 + Rooms	76.3%	71.1%	68.0%	66.8%	60.9%	68.6%
101-219 Rooms	78.2%	71.2%	67.7%	64.7%	59.3%	68.2%
220-500 Rooms	74.0%	71.8%	69.6%	69.6%	67.1%	70.4%
Region						
North	74.8%	71.4%	65.8%	63.9%	58.1%	66.8%
Central	78.6%	72.4%	69.5%	66.8%	62.1%	69.9%
South	74.0%	70.1%	66.3%	64.3%	56.9%	66.3%
Available Inventory	5,352,902**	5,378,710*	5,386,713*	5,373,706*	5,432,003*	5,384,807*

*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.

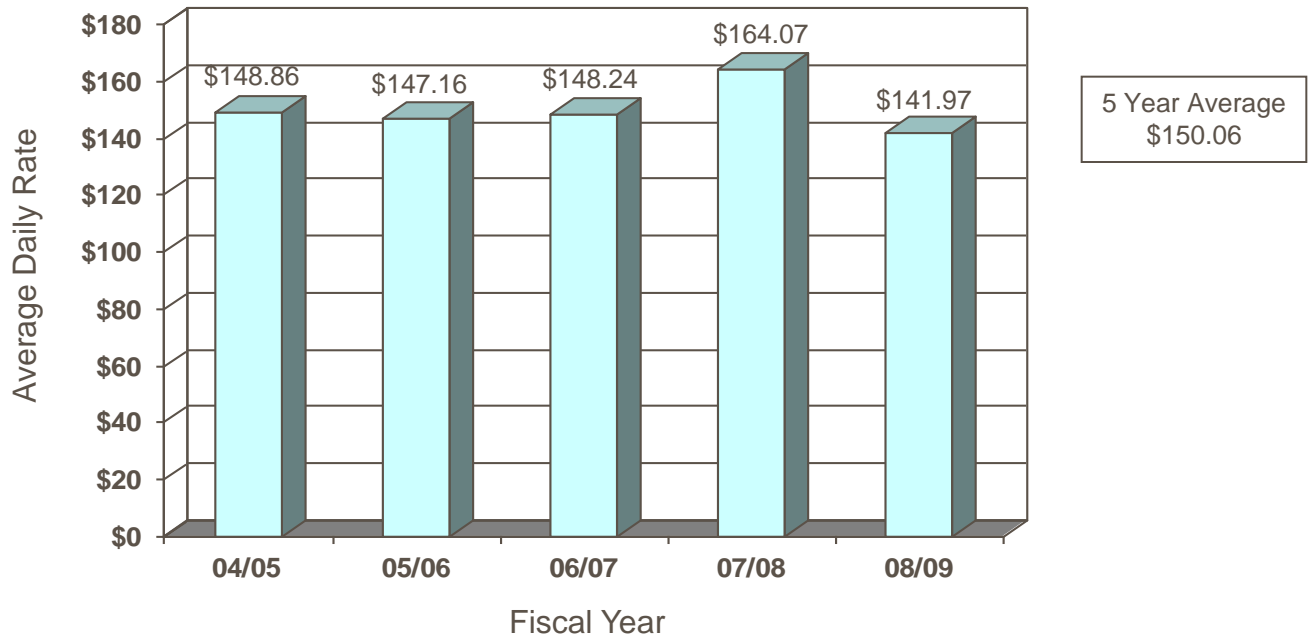


Table 6
AVERAGE DAILY ROOM RATE (ADR) IN PALM BEACH COUNTY
FISCAL YEAR 2004/05 THROUGH FISCAL YEAR 2008/09

FISCAL YEAR	AVERAGE DAILY ROOM RATE	% CHANGE FY TO FY
2004/05	\$148.86	14.4%
2005/06	\$147.16	- 1.1%
2006/07	\$148.24	0.7%
2007/08	\$164.07	10.7%
2008/09	\$141.97	- 13.5%
5 YEAR AVERAGE	\$150.06	2.2%



Table 7
Annual Average Daily Room Rate (ADR) Trends





**Table 8
Gross Lodging Revenues***

Month	FY 2006 Gross Rentals	FY 2006 Gross Collections	FY 2007 Gross Rentals	FY 2007 Gross Collections	FY 2008 Gross Rentals	FY 2008 Gross Collections	FY 2009 Gross Rentals	FY 2009 Gross Collections
October	\$32,749,480.11	\$1,039,385.87	\$23,825,421.51	\$886,574.48	\$24,423,485.18	\$1,131,674.97	\$23,082,593.26	\$1,071,294.59
November	\$29,546,352.45	\$1,071,431.96	\$33,957,902.55	\$1,244,490.46	\$35,666,381.09	\$1,676,048.79	\$22,187,724.85	\$1,161,279.47
December	\$49,598,509.33	\$1,883,848.00	\$42,914,008.10	\$1,654,439.00	\$43,267,889.21	\$2,055,306.98	\$42,379,551.31	\$2,035,103.92
January	\$60,057,706.49	\$2,307,616.18	\$52,063,956.93	\$2,385,000.70	\$55,134,430.15	\$2,667,165.77	\$47,984,045.91	\$2,341,827.14
February	\$71,802,017.67	\$2,773,092.62	\$72,070,998.40	\$3,438,956.93	\$69,834,953.13	\$3,406,194.62	\$56,580,289.55	\$2,746,930.14
March	\$89,313,319.12	\$3,493,487.00	\$79,873,677.03	\$3,858,124.00	\$80,758,299.80	\$3,945,919.60	\$62,371,043.68	\$2,954,732.00
April	\$85,582,586.01	\$3,291,238.57	\$85,494,627.79	\$4,096,406.37	\$81,881,478.89	\$3,963,407.46	\$60,735,435.36	\$2,860,824.46
May	\$59,889,914.76	\$2,352,605.80	\$57,933,494.53	\$2,741,312.88	\$56,906,714.60	\$2,692,789.88	\$45,183,097.00	\$2,093,963.00
June	\$43,316,634.57	\$1,669,614.00	\$40,732,061.70	\$2,155,836.00	\$38,429,652.91	\$1,861,531.51	\$28,996,894.08	\$1,401,054.69
July	\$38,183,648.36	\$1,466,735.27	\$33,682,695.95	\$1,600,277.30	\$31,254,113.50	\$1,519,681.75	\$25,346,316.28	\$1,232,631.74
August	\$31,460,455.98	\$1,138,400.64	\$29,607,325.38	\$1,382,131.50	\$29,836,695.65	\$1,450,767.45	\$25,055,205.05	\$1,247,083.06
September	\$27,238,211.11	\$1,041,111.00	\$28,834,633.45	\$1,374,520.00	\$29,964,297.40	\$1,443,229.32	\$24,493,023.87	\$1,199,767.25
Total Fiscal	\$618,738,835.96	\$23,528,566.91	\$580,990,803.32	\$26,818,069.62	\$577,358,391.51	\$27,813,718.10	\$464,395,220.20	\$22,346,491.46
Season vs. Non-Season								
Season (November – April)	\$385,900,491.07	\$14,820,714.33	\$366,375,170.80	\$16,677,417.46	\$366,543,432.27	\$17,714,043.22	\$292,238,090.66	\$14,100,697.13
Non – Season	\$232,838,344.89	\$8,707,852.58	\$214,615,632.52	\$10,140,652.16	\$210,814,959.24	\$10,099,674.88	\$172,157,129.54	\$8,245,794.33
Total Fiscal	\$618,738,835.96	\$23,528,566.91	\$580,990,803.32	\$26,818,069.62	\$577,358,391.51	\$27,813,718.10	\$464,395,220.20	\$22,346,491.46
Percentage of Season vs. Non-Season								
Season (November – April)	62.4%	63.0%	63.1%	62.2%	63.5%	63.7%	62.9%	63.1%
Non - Season	37.6%	37.0%	36.9%	37.8%	36.5%	36.3%	37.1%	36.9%

* 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**

Month: Industry (Collection)	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
September (October)	\$864,187.90	\$1,039,385.87	\$886,574.48	\$1,131,674.97	\$1,071,294.59	\$998,623.56
October (November)	\$1,629,501.98	\$1,071,431.96	\$1,244,490.46	\$1,676,048.79	\$1,161,279.47	\$1,356,550.53
November (December)	\$1,675,407.00	\$1,883,848.00	\$1,654,439.00	\$2,055,306.98	\$2,035,103.92	\$1,860,820.98
December (January)	\$2,208,263.86	\$2,307,616.18	\$2,385,000.70	\$2,667,165.77	\$2,341,827.14	\$2,381,974.73
January (February)	\$2,615,053.95	\$2,773,092.62	\$3,438,956.93	\$3,406,194.62	\$2,746,930.14	\$2,996,045.65
February (March)	\$3,104,514.00	\$3,493,487.00	\$3,858,124.00	\$3,945,919.60	\$2,954,732.00	\$3,471,355.32
March (April)	\$3,181,774.76	\$3,291,238.57	\$4,096,406.37	\$3,963,407.46	\$2,860,824.46	\$3,478,730.32
April (May)	\$2,182,436.22	\$2,352,605.80	\$2,741,312.88	\$2,692,789.88	\$2,093,963.00	\$2,412,621.56
May (June)	\$1,498,682.00	\$1,669,614.00	\$2,155,836.00	\$1,861,531.51	\$1,401,054.69	\$1,717,343.64
June (July)	\$1,345,748.67	\$1,466,735.27	\$1,600,277.30	\$1,519,681.75	\$1,232,631.74	\$1,433,014.95
July (August)	\$1,105,729.33	\$1,138,400.64	\$1,382,131.50	\$1,450,767.45	\$1,247,083.06	\$1,264,822.40
August (September)	\$1,105,074.00	\$1,041,111.00	\$1,374,520.00	\$1,443,229.32	\$1,199,767.25	\$1,232,740.31
Total Fiscal	\$22,516,373.67	\$23,528,566.91	\$26,818,069.62	\$27,813,718.10	\$22,346,491.46	\$24,604,643.95

* 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

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
October	\$121.60	\$124.19	\$122.07	\$132.74	\$132.08	\$126.54
November	\$136.95	\$145.99	\$131.16	\$146.15	\$148.18	\$141.69
December	\$143.42	\$148.11	\$149.45	\$172.23	\$168.85	\$156.41
January	\$185.14	\$185.46	\$186.67	\$222.37	\$177.00	\$191.33
February	\$216.02	\$222.86	\$213.29	\$232.92	\$199.44	\$216.91
March	\$218.58	\$199.94	\$211.85	\$241.20	\$190.16	\$212.35
April	\$180.44	\$175.00	\$177.15	\$182.72	\$163.83	\$175.83
May	\$133.26	\$135.32	\$134.96	\$145.63	\$121.45	\$134.12
June	\$111.03	\$115.79	\$119.67	\$131.21	\$105.17	\$116.57
July	\$105.31	\$107.91	\$107.90	\$129.74	\$100.70	\$110.31
August	\$103.20	\$100.37	\$110.25	\$122.63	\$95.03	\$106.30
September	\$131.34	\$104.98	\$114.53	\$109.30	\$101.80	\$112.39



Table 11
MONTHLY HOTEL OCCUPANCY RATE TRENDS

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
October	84.5%	61.2%	62.0%	59.6%	54.9%	64.4%
November	80.8%	82.3%	69.0%	65.6%	57.9%	71.1%
December	74.0%	73.8%	62.7%	63.1%	60.8%	66.9%
January	84.0%	79.7%	73.8%	73.0%	67.2%	75.5%
February	91.1%	86.3%	82.8%	81.8%	72.1%	82.8%
March	89.9%	87.1%	85.6%	81.8%	68.3%	82.5%
April	79.1%	73.6%	73.8%	69.5%	63.8%	72.0%
May	68.5%	70.8%	65.7%	64.6%	57.0%	65.3%
June	70.0%	68.9%	65.6%	62.1%	53.2%	64.0%
July	64.6%	62.1%	59.8%	60.3%	53.7%	60.1%
August	62.0%	57.0%	58.4%	54.6%	55.2%	57.4%
September	62.9%	51.2%	49.9%	46.2%	45.3%	51.1%



Table 12
HOTEL ROOM NIGHTS OCCUPIED BY GROUPS IN PALM BEACH COUNTY
FISCAL YEAR 2004/05 THROUGH FISCAL YEAR 2008/09

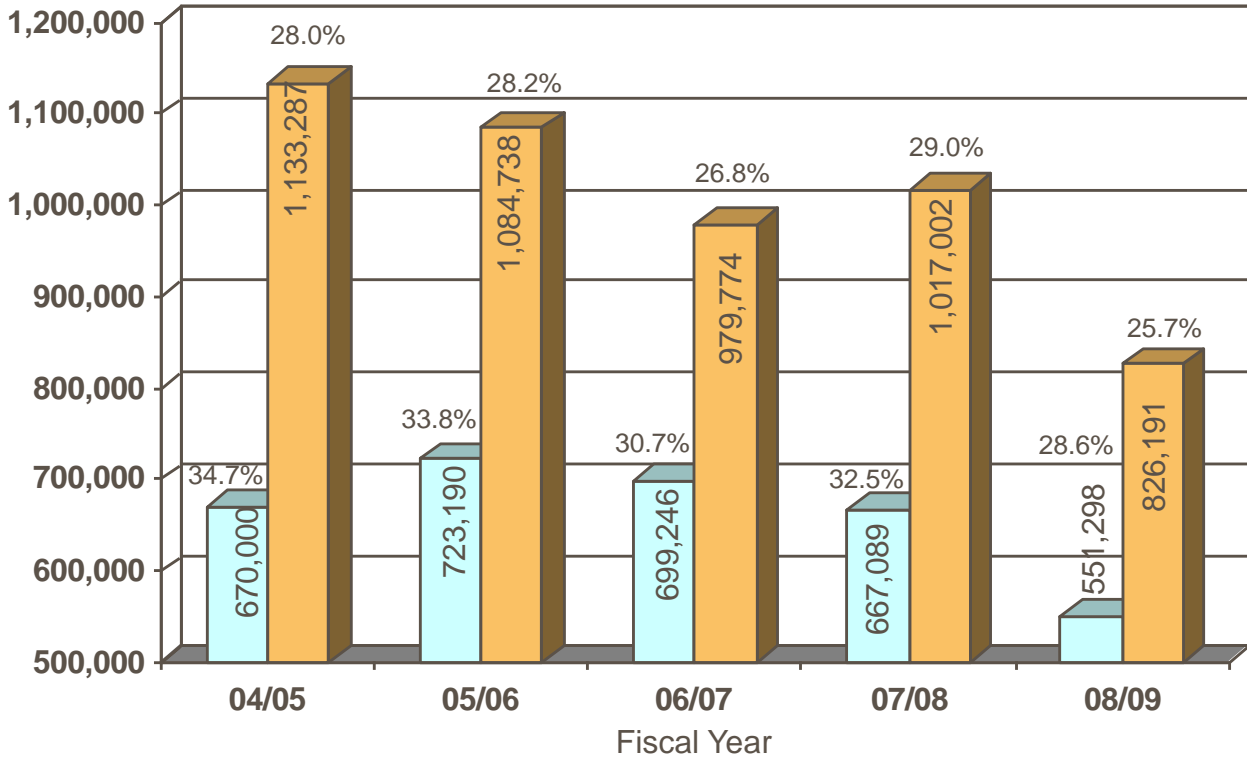
FISCAL YEAR	TOTAL ROOM NIGHTS OCCUPIED	GROUP ROOM NIGHTS	% CHANGE FY TO FY	GROUP ROOM NIGHTS IN CONVEN. HOTELS	% CHANGE FY TO FY
2004/05	4,057,276**	1,133,287	8.8%	670,000	3.4%
2005/06	3,829,804*	1,084,738	- 4.3%	723,190	7.9%
2006/07	3,628,164*	979,774	- 9.7%	699,246	- 3.3%
2007/08	3,499,289*	1,017,002	3.8%	667,089	- 4.6%
2008/09	3,206,236*	826,191	- 18.8%	551,298	- 17.4%
5 YEAR AVERAGE	3,644,154*	1,008,198	- 4.0%	662,165	- 2.8%

*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
■ Convention Hotels	662,165 (32.1%)
■ All Hotels	1,008,198 (27.5%)



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

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
October	42.3%	44.3%	33.8%	37.9%	35.8%	38.8%
November	40.2%	39.5%	34.9%	35.0%	29.0%	35.7%
December	23.3%	29.4%	25.7%	22.8%	23.7%	25.0%
January	35.6%	34.8%	34.1%	37.0%	25.1%	33.3%
February	30.6%	27.5%	27.8%	30.2%	29.1%	29.0%
March	29.0%	30.5%	27.2%	28.3%	25.5%	28.1%
April	36.9%	34.0%	32.9%	34.2%	27.2%	33.0%
May	37.8%	36.5%	36.0%	35.8%	30.4%	35.3%
June	39.7%	38.1%	36.1%	37.0%	29.6%	36.1%
July	29.0%	31.5%	28.7%	31.2%	30.6%	30.2%
August	29.2%	28.6%	26.7%	27.1%	34.9%	29.3%
September	42.6%	31.0%	23.9%	33.3%	22.0%	30.6%



**Table 15
PRIMARY CHARACTERISTICS OF HOTEL GUESTS STAYING IN PALM BEACH COUNTY
FISCAL YEAR 2004/05 THROUGH FISCAL YEAR 2008/09**

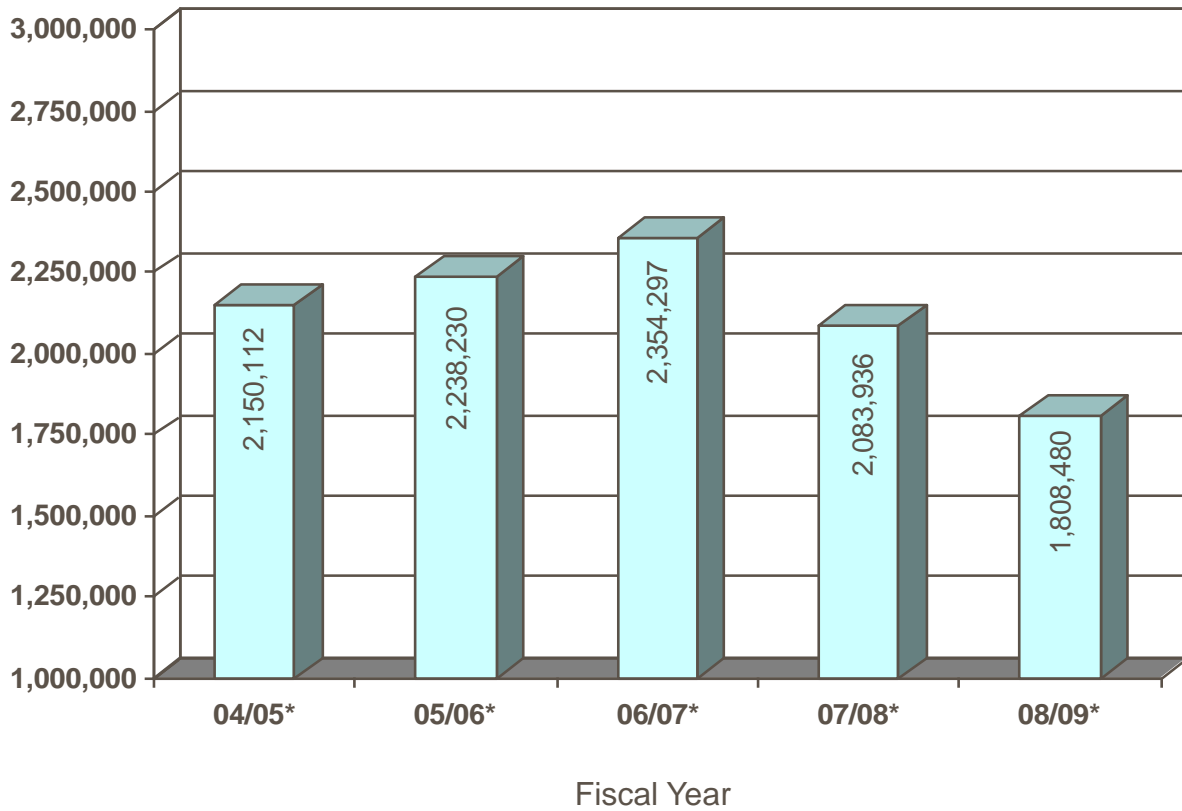
	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
Estimated Number of Hotel Guests	2,150,112+	2,238,230+	2,354,297+	2,083,936+	1,808,480+	2,127,011+
Average Party Size**	2.1	2.1	2.1	2.0	2.0	2.1
Nights in Hotel	4.0	3.6	3.3	3.4	3.6	3.6
Purpose of Visit						
Conference/Convention/ Business Meeting	56%	60%	58%	60%	55%	58%
- Business Meeting	49%	52%	51%	51%	46%	50%
- Conference/Convention	7%	6%	7%	8%	9%	7%
- Other Business	1%	2%	1%	0.2%	0.3%	1%
Vacation/Pleasure	35%	32%	33%	35%	36%	34%
Sports Event	3%	3%	3%	2%	3%	3%
Cultural Attraction	1%	0.4%	1%	0.2%	0.7%	1%
Other	5%	4%	4%	4%	4%	4%

**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 = 2,127,011

* 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 2004/05 THROUGH FISCAL YEAR 2008/09

FISCAL YEAR	HOTEL GUESTS	% CHANGE FY TO FY	EXPENDITURES	% CHANGE FY TO FY
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%
2008/09	1,808,480*	- 13.2%	\$1,276,786,880	- 16.4%
5 YEAR AVERAGE	2,127,011	- 3.9%	\$1,535,086,739	- 1.2%

* 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 2004/05 THROUGH 2008/09**

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
Occupancy Rate	76.0%	71.2%	67.4%	65.2%	59.1%	67.8%
Occupancy Rate by Hotel Size						
50 -100 Rooms	74.2%	71.6%	63.9%	56.3%	50.2%	63.2%
101+ Rooms	76.3%	71.1%	68.0%	66.8%	60.9%	68.6%
101-219 Rooms	78.2%	71.2%	67.7%	64.7%	59.3%	68.2%
220-500 Rooms	74.0%	71.8%	69.6%	69.6%	67.1%	70.4%
Occupancy Rate by Geographic Region						
North	74.8%	71.4%	65.8%	63.9%	58.1%	66.8%
Central	78.6%	72.4%	69.5%	66.8%	62.1%	69.9%
South	74.0%	70.1%	66.3%	64.3%	56.9%	66.3%
Room Nights Occupied (FYTD)	4,057,276**	3,829,804*	3,628,164*	3,499,289*	3,206,236*	3,644,154*
Average Daily Room Rate (ADR)	\$148.86	\$147.16	\$148.24	\$164.07	\$141.97	\$150.06
Percentage of Occupied Room Nights						
Leisure	37.1%	38.2%	39.5%	38.6%	41.4%	39.0%
Business	34.8%	33.5%	33.7%	32.5%	32.9%	33.5%
Conference/Convention	28.0%	28.2%	26.8%	29.0%	25.7%	27.5%

* 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 2004/05 THROUGH 2008/09**

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
Room Inventory	5,352,902**	5,378,710*	5,386,713*	5,373,706*	5,432,003*	5,384,807*
Overall Occupancy Rate	76.0%	71.2%	67.4%	65.2%	59.1%	67.8%
October	84.5%	61.2%	62.0%	59.6%	54.9%	64.4%
November	80.8%	82.3%	69.0%	65.6%	57.9%	71.1%
December	74.0%	73.8%	62.7%	63.1%	60.8%	66.9%
January	84.0%	79.7%	73.8%	73.0%	67.2%	75.5%
February	91.1%	86.3%	82.8%	81.8%	72.1%	82.8%
March	89.9%	87.1%	85.6%	81.8%	68.3%	82.5%
April	79.1%	73.6%	73.8%	69.5%	63.8%	72.0%
May	68.5%	70.8%	65.7%	64.6%	57.0%	65.3%
June	70.0%	68.9%	65.6%	62.1%	53.2%	64.0%
July	64.6%	62.1%	59.8%	60.3%	53.7%	60.1%
August	62.0%	57.0%	58.4%	54.6%	55.2%	57.4%
September	62.9%	51.2%	49.9%	46.2%	45.3%	51.1%
Room Nights Occupied	4,057,276**	3,829,804*	3,628,164*	3,499,289*	3,206,236*	3,644,154*

* 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 2004/05 THROUGH 2008/09**

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
Average Daily Room Rate (ADR)	\$148.86	\$147.16	\$148.24	\$164.07	\$141.97	\$150.06
ADR by Hotel Size						
50 -100 Rooms	\$133.84	\$124.95	\$133.23	\$160.32	\$131.05	\$136.68
101 + Rooms	\$151.39	\$150.93	\$150.56	\$165.28	\$144.31	\$152.49
101-219 Rooms	\$116.52	\$110.78	\$105.56	\$116.42	\$104.42	\$110.74
220-500 Rooms	\$150.31	\$158.11	\$158.53	\$181.20	\$147.39	\$159.11



Table 21
AVERAGE DAILY ROOM RATE (ADR) BY MONTH AND FISCAL YEAR
FISCAL YEAR 2004/05 THROUGH 2008/09

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
Overall ADR	\$148.86	\$147.16	\$148.24	\$164.07	\$141.97	\$150.06
October	\$121.60	\$124.19	\$122.04	\$132.74	\$132.08	\$126.53
November	\$136.95	\$145.99	\$131.16	\$146.15	\$148.18	\$141.69
December	\$143.42	\$148.11	\$149.45	\$172.23	\$168.85	\$156.41
January	\$185.14	\$185.46	\$186.67	\$222.37	\$177.00	\$191.33
February	\$216.02	\$222.86	\$213.29	\$232.92	\$199.44	\$216.91
March	\$218.58	\$199.94	\$211.85	\$241.20	\$190.16	\$212.35
April	\$180.44	\$175.00	\$177.15	\$182.72	\$163.83	\$175.83
May	\$133.26	\$135.32	\$134.96	\$145.63	\$121.45	\$134.12
June	\$111.03	\$115.79	\$119.67	\$131.21	\$105.17	\$116.57
July	\$105.31	\$107.91	\$107.90	\$129.74	\$100.70	\$110.31
August	\$103.20	\$100.37	\$110.25	\$122.63	\$95.03	\$106.30
September	\$131.34	\$104.98	\$114.53	\$109.30	\$101.80	\$112.39

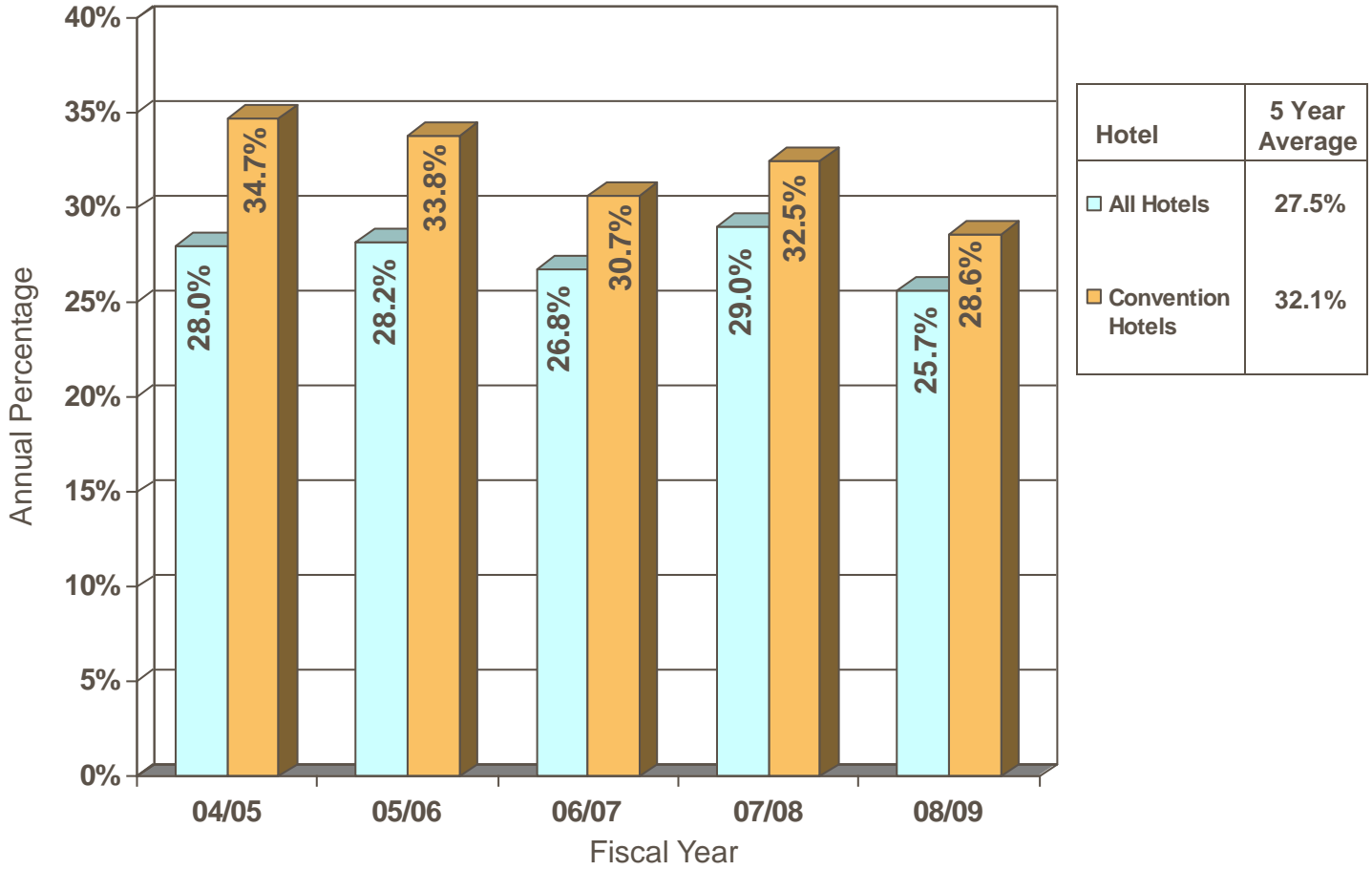


**Table 22
GROUP BOOKINGS IN PALM BEACH COUNTY
FISCAL YEAR 2004/05 THROUGH 2008/09**

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
% Occupied by Groups in PBC	28.0%	28.2%	26.8%	29.0%	25.7%	27.5%
Room Nights Occupied by Groups in PBC	1,133,287	1,084,738	979,774	1,017,002	826,191	1,008,198
% Occupied by Groups in Convention Hotels	34.7%	33.8%	30.7%	32.5%	28.6%	32.1%
Room Nights Occupied by Groups in PBC Convention Hotels	670,000	723,190	699,246	667,089	551,298	662,165



Table 23
Hotel Room Nights Occupied by Groups





**Table 24
Response Rates
FISCAL YEAR 2004/05 THROUGH 2008/09**

Response Rates by Hotel Size	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
50 -100 Rooms	56.6%	50.6%	52.1%	32.9%	29.3%	44.3%
101+ Rooms	66.6%	60.3%	62.4%	66.9%	58.1%	62.9%
101-219 Rooms	48.5%	40.5%	47.4%	52.3%	44.3%	46.6%
220-500 Rooms	85.9%	80.9%	75.1%	80.7%	64.6%	77.4%
Response Rates by Geographic Region						
North	61.5%	57.5%	56.9%	61.2%	44.9%	56.4%
Central	68.1%	59.2%	59.4%	60.3%	52.0%	59.8%
South	64.7%	59.9%	65.7%	64.2%	59.4%	62.8%
Overall Response Rate	65.1%	59.1%	61.4%	62.1%	53.5%	60.2%



**Table 25
PERCENTAGE OF INTERNATIONAL GUESTS**

International Guests by Hotel Size	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
50 -100 Rooms	5.6%	8.8%	10.9%	9.9%	8.8%
101+ Rooms	3.1%	3.3%	5.3%	5.4%	4.3%
101-219 Rooms	3.9%	3.4%	6.4%	5.8%	4.9%
220-500 Rooms	1.2%	2.0%	5.5%	4.5%	3.3%
International Guests by Geographic Region					
North	1.4%	2.7%	3.4%	3.4%	2.7%
Central	3.4%	3.0%	5.3%	6.7%	4.6%
South	4.6%	6.1%	8.8%	6.5%	6.5%
Overall Percentage of International Guests	3.5%	4.0%	6.2%	6.2%	5.0%



Hotel Visitor Survey Tables



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

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Visitors Staying in Hotels							
Party Size*	2.1	2.1	2.1	2.0	2.0	0.0	2.1
Nights in County	4.2	3.8	3.3	3.5	3.9	0.4	3.7
Nights in Hotel	4.0	3.6	3.3	3.4	3.6	0.2	3.6
Rooms Per Night*	1.3	1.3	1.3	1.3	1.2	-0.1	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**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Average Expenditures Per Visit*							
Lodging	\$716	\$886	\$766	\$779	\$716	-63	\$773
Restaurant/Bar	\$392	\$335	\$347	\$377	\$389	12	\$368
Gifts/Shopping	\$224	\$133	\$102	\$133	\$115	-18	\$141
Entertainment/Recreation	\$84	\$50	\$53	\$34	\$47	13	\$54
Local Travel	\$192	\$151	\$129	\$143	\$144	1	\$152
Total Per Party	\$1,608	\$1,555	\$1,396	\$1,465	\$1,411	-54	\$1,487
Average Expenditures Per Person Per Day (based on average number of persons per party)							
Total Per Person	\$766	\$741	\$665	\$733	\$706	-27	\$722
Total Per Person/Per Day	\$191	\$206	\$201	\$216	\$196	-20	\$202
Lodging	\$85	\$117	\$110	\$115	\$100	-15	\$105
Restaurant/Bar	\$47	\$44	\$50	\$56	\$54	-2	\$50
Gifts/Shopping	\$27	\$18	\$15	\$20	\$16	-4	\$19
Entertainment/Recreation	\$10	\$7	\$8	\$5	\$7	2	\$7
Local Travel	\$23	\$20	\$19	\$21	\$20	-1	\$21

* 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 VISIT¹**

	2004/2005					2005/2006					2006/2007					2007/2008					2008/2009				
	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	2.6	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	2.5	1.9	1.5	2.3	2.4
Nights in Hotel/Motel	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	4.4	2.9	3.1	4.1	2.6
Expenditures																									
Lodging	\$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	\$854	\$597	\$626	\$841	\$447
Restaurant/Bar	\$554	\$328	\$290	\$664	\$166	\$400	\$315	\$279	\$504	\$385	\$407	\$220	\$305	\$518	\$194	\$464	\$371	\$302	\$845	\$325	\$462	\$267	\$350	\$513	\$221
Gifts/Shopping	\$421	\$200	\$99	\$432	\$67	\$280	\$130	\$54	\$230	\$112	\$181	\$56	\$55	\$216	\$115	\$246	\$60	\$70	\$235	\$171	\$224	\$64	\$59	\$148	\$23
Entertainment/Rec.	\$127	\$88	\$46	\$308	\$0	\$86	\$39	\$33	\$86	\$101	\$70	\$19	\$41	\$180	\$41	\$55	\$4	\$20	\$187	\$12	\$75	\$23	\$22	\$357	\$0
Local Travel	\$240	\$132	\$158	\$448	\$84	\$172	\$77	\$135	\$115	\$155	\$141	\$65	\$122	\$243	\$53	\$160	\$95	\$128	\$259	\$131	\$185	\$81	\$130	\$115	\$122
Total Per Party	\$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	\$1,800	\$1,032	\$1,187	\$1,972	\$814
Total Per Person	\$882	\$718	\$674	\$1,082	\$304	\$784	\$825	\$711	\$772	\$593	\$643	\$551	\$691	\$839	\$402	\$721	\$778	\$741	\$1,142	\$514	\$720	\$543	\$792	\$857	\$339
Total Per Person/Day	\$180	\$180	\$204	\$200	\$127	\$182	\$236	\$237	\$161	\$165	\$174	\$178	\$238	\$187	\$168	\$185	\$222	\$256	\$238	\$177	\$164	\$187	\$255	\$209	\$130

	5 YEAR AVERAGE				
	Leisure	Group*	Bus.	Sports	Other
Average Party Size**	2.6	2.0	1.6	2.6	2.3
Nights in Hotel/Motel	4.2	3.4	3.0	4.7	2.8
Expenditures					
Lodging	\$931	\$807	\$641	\$1,088	\$509
Restaurant/Bar	\$457	\$300	\$305	\$609	\$258
Gifts/Shopping	\$270	\$102	\$67	\$252	\$98
Entertainment/Rec.	\$83	\$35	\$32	\$224	\$31
Local Travel	\$180	\$90	\$135	\$236	\$109
Total Per Party	\$1,921	\$1,333	\$1,180	\$2,409	\$1,005
Total Per Person	\$750	\$683	\$722	\$938	\$430
Total Per Person/Day	\$177	\$201	\$238	\$199	\$153

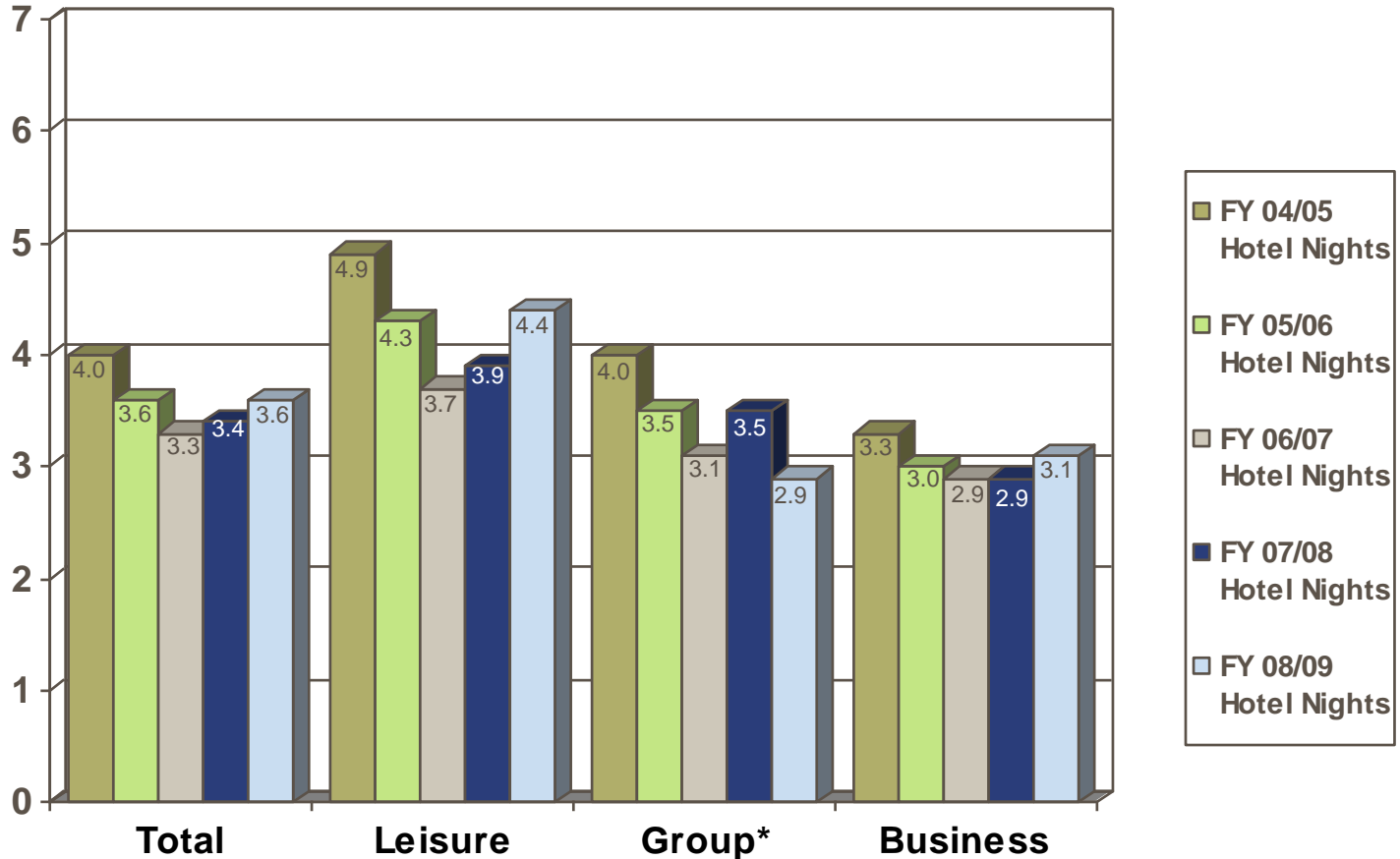
*Starting in FY 2001/02, group includes Conference/Convention as well as Film/TV production.

**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.

¹ 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

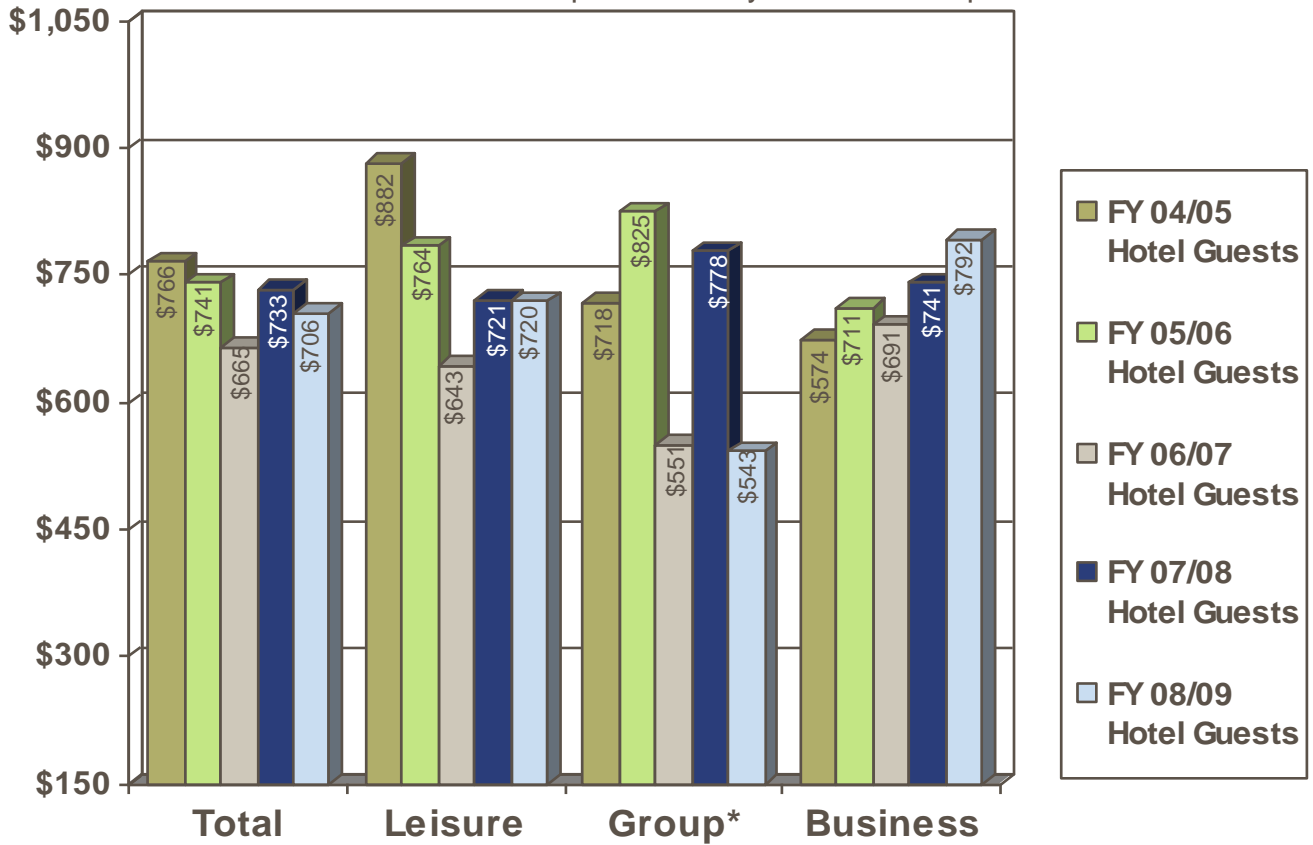


*Starting in FY 2001/02, group includes Conference/Convention as well as Film/TV production.

Traveler Group	5 Year Average
Total	3.6
Leisure	4.4
Group	3.4
Business	3.1



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	\$722
Leisure	\$751
Group	\$651
Business	\$688



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

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Reason for Trip							
Conference/Convention/ Business Meeting	56.3%	60.1%	58.2%	59.6%	55.0%	- 4.6	57.8%
- Business Meeting	48.7%	52.1%	50.6%	51.1%	46.0%	- 5.1	49.7%
- Conference/Convention	7.0%	6.3%	6.9%	8.3%	8.7%	0.4	7.4%
- Other Business	0.6%	1.7%	0.8%	0.2%	0.3%	0.1	0.7%
Vacation/Pleasure	35.3%	32.4%	33.3%	34.5%	36.1%	1.6	34.3%
Sporting Event	2.8%	3.1%	3.4%	1.7%	3.1%	1.4	2.8%
Cultural Attraction	0.5%	0.4%	0.8%	0.2%	0.7%	0.5	0.5%
Film/TV Production	0.0%	0.0%	0.5%	0.1%	0.1%	0.0	0.1%
Other	5.1%	4.0%	3.9%	3.8%	4.0%	0.2	4.2%
Who Made the Decision*							
Employer	50.4%	58.2%	54.3%	55.5%	50.8%	- 4.7	53.8%
Head of Household/Other Adult	47.5%	36.0%	37.1%	36.2%	43.1%	6.9	40.0%
Family Living in PBC	N/A	6.2%	8.6%	8.3%	7.6%	- 0.7	7.7%
Children influenced decision	2.1%	1.6%	1.8%	1.1%	1.2%	0.1	1.6%
Advanced Planning							
One Month or Less	52.7%	56.9%	57.0%	58.0%	58.5%	0.5	56.6%
Two to Three Months	22.6%	22.9%	21.8%	21.1%	20.5%	- 0.6	21.8%
More than Three Months	24.7%	20.2%	21.2%	20.9%	21.0%	0.1	21.6%

* 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**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Reasons for Selecting PBC over other destinations*							
Work Related Trip	56.3%	58.5%	56.6%	57.8%	52.9%	- 4.9	56.4%
Visit Friends/Relatives	21.4%	20.6%	19.5%	20.7%	22.3%	1.6	20.9%
Previous visit	13.3%	9.8%	11.4%	13.2%	16.0%	2.8	12.7%
Weather	6.1%	7.2%	5.9%	5.9%	8.2%	2.3	6.7%
Beaches	5.0%	4.4%	5.9%	5.4%	7.2%	1.8	5.6%
Special Event	11.8%	5.6%	6.8%	7.3%	6.8%	- 0.5	7.7%
Convenient Flights	5.1%	7.4%	5.8%	5.3%	4.7%	- 0.6	5.7%
Golf/Tennis/Recreation	3.4%	3.2%	2.6%	2.4%	2.9%	0.5	2.9%
Friends/Relatives recommendation	14.2%	3.1%	2.6%	2.6%	2.7%	0.1	5.0%
Attend a Sporting Event	2.2%	1.8%	1.5%	0.4%	1.8%	1.4	1.5%
Hotel Brochures/Websites	3.3%	0.9%	1.8%	1.1%	1.7%	0.6	1.8%
Compete in Sports Event/Competition	1.0%	0.7%	1.0%	0.9%	1.3%	0.4	1.0%
Attraction Brochures/Website	1.0%	0.6%	1.1%	0.5%	0.7%	0.2	0.8%
Arts or Cultural Event	1.5%	1.0%	0.8%	0.4%	0.6%	0.2	0.9%
Other Internet sources	4.1%	0.7%	0.4%	0.4%	0.5%	0.1	1.2%
PBC-CVB	0.7%	0.1%	0.3%	0.3%	0.4%	0.1	0.4%
Spring Training	0.7%	0.5%	0.6%	0.5%	0.3%	- 0.2	0.5%
Bus Tour	N/A	0.2%	0.1%	0.0%	0.2%	0.2	0.1%
Travel Agency	1.3%	0.2%	0.1%	0.2%	0.1%	- 0.1	0.4%
State Tourist Agency	0.3%	0.0%	0.1%	0.1%	0.0%	- 0.1	0.1%
Spanish Language Media	N/A	0.1%	0.1%	0.0%	0.0%	0.0	0.1%
Media Coverage	2.0%	0.1%	0.1%	0.0%	0.0%	0.0	0.4%
Other	11.1%	4.7%	5.1%	4.4%	4.2%	- 0.2	5.9%

*Multiple responses accepted



**Table 33
BOOKING TOOLS**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
<u>Booked with Travel Agency</u>							
Yes	24.4%	24.4%	24.6%	22.9%	23.5%	0.6	24.0%
No	75.6%	75.6%	75.4%	77.1%	76.5%	- 0.6	76.0%
<u>Visit was part of a package (that may have included airfare, lodging, meals, rental car, etc..)</u>							
Yes	10.1%	10.0%	6.5%	4.9%	5.3%	0.4	7.4%
No	89.9%	90.0%	93.5%	95.1%	94.7%	- 0.4	92.6%
<u>Booked any part of this trip using the internet</u>							
Yes	43.8%	47.8%	46.8%	47.1%	50.7%	3.6	47.2%
No	56.2%	52.2%	53.2%	52.9%	49.3%	- 3.6	52.8%
<u>Areas Booked Using Internet (among those who used the internet)*</u>							
Hotel	60.4%	60.4%	70.7%	75.3%	80.9%	5.6	69.5%
Air	76.5%	73.8%	69.3%	67.8%	60.5%	- 7.3	69.6%
Car Rental	44.3%	41.1%	39.5%	39.0%	31.9%	- 7.1	39.2%
Tickets to Event	1.1%	1.4%	1.3%	0.6%	0.3%	- 0.3	0.9%
Other	2.5%	5.6%	4.4%	3.4%	4.6%	1.2	4.1%

* Multiple responses accepted.



Table 34 ACTIVITY PARTICIPATION	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Participation in Specific Activities *							
Restaurants	94.5%	92.4%	93.6%	94.3%	96.1%	1.8	94.2%
Shopping	40.5%	35.1%	30.9%	31.0%	32.0%	1.0	33.9%
Went to Beach	35.0%	26.5%	26.6%	27.7%	29.1%	1.4	29.0%
Swimming	10.2%**	15.3%	15.2%	16.8%	20.0%	3.2	15.5%
Bars/Nightclubs	14.4%	12.0%	12.1%	9.5%	10.8%	1.3	11.8%
Visited Downtown West Palm Beach/City Place	11.4%	10.3%	10.7%	9.0%	10.2%	1.2	10.3%
Golf, Tennis	12.5%	11.1%	9.4%	7.6%	10.1%	2.5	10.1%
Visited Downtown Delray Beach Attractions	9.8%	7.2%	5.3%	5.5%	8.3%	2.8	7.2%
Visited Mizner Park – Boca Raton	8.7%	7.1%	4.5%	5.6%	6.9%	1.3	6.6%
Museums, Art galleries	3.7%	3.8%	2.1%	2.6%	4.1%	1.5	3.3%
Visited Downtown at the Gardens	N/A	1.7%	1.8%	2.0%	3.1%	1.1	2.2%
Attractions/Tours/Zoos	3.8%	2.7%	1.7%	2.1%	2.8%	0.7	2.6%
Visited Palm Beach/Worth Avenue***	N/A	N/A	0.3%	2.2%	2.6%	0.4	1.7%
Visited Wildlife Refuge	3.0%	3.1%	2.5%	2.8%	2.4%	- 0.4	2.8%
Fishing	10.2%**	1.2%	1.5%	1.3%	2.2%	0.9	3.3%
Boating	10.2%**	1.9%	1.9%	2.1%	2.1%	0.0	3.6%
Attended a Sporting Event	1.6%	2.2%	2.0%	1.8%	2.1%	0.3	1.9%
Performing Arts	2.1%	1.8%	1.5%	1.1%	1.9%	0.8	1.7%
Visited Riviera Beach/Singer Island	1.1%	1.4%	0.9%	0.9%	1.5%	0.6	1.2%
Visited Downtown Lake Worth	1.5%	1.4%	1.1%	1.1%	1.1%	0.0	1.2%
Competed in Sports Event	1.0%	0.7%	0.6%	0.2%	0.9%	0.7	0.7%
Snorkeling	10.2%**	0.9%	0.9%	0.9%	0.8%	- 0.1	2.7%
Gambling Cruise	1.8%	0.9%	0.8%	0.8%	0.6%	- 0.2	1.0%
Pari-Mutuels (dog-track)	0.5%	0.4%	0.2%	0.2%	0.5%	0.3	0.4%
Horse Related Activity+	N/A	N/A	N/A	0.5%	0.4%	- 0.1	0.5%
Surfing	10.2%**	0.4%	0.2%	0.2%	0.3%	0.1	2.3%
Diving	10.2%**	0.4%	0.4%	0.4%	0.2%	- 0.2	2.3%
Kite Surfing	10.2%**	0.1%	0.1%	0.2%	0.1%	-0.1	2.1%
Palm Beach County Convention Center	0.8%	0.2%	0.3%	0.1%	0.1%	0.0	0.3%
Other Activity	7.2%	5.8%	6.3%	9.9%	6.6%	- 3.3	7.2%

*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**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
<u>Plan to Return to PBC</u>							
Yes	81.7%	81.2%	84.3%	83.7%	86.7%	3.0	83.5%
No	3.5%	3.0%	2.5%	3.0%	2.5%	- 0.5	2.9%
Don't Know	14.8%	15.8%	13.2%	13.2%	10.9%	- 2.3	13.6%
<u>If no, why not? *</u>							
No business in the area	N/A	24.3%	17.3%	19.6%	14.4%	- 5.2	18.9%
Going to other places/I like changing destinations	N/A	9.8%	5.2%	3.2%	13.0%	9.8	7.8%
Too expensive	N/A	3.0%	6.7%	3.5%	4.3%	0.8	4.4%
Too far	N/A	0.0%	7.1%	6.8%	3.8%	- 3.0	4.4%
Don't like it here	N/A	0.0%	3.8%	6.0%	2.7%	- 3.3	3.1%
No interest	N/A	2.3%	1.4%	0.0%	6.0%	6.0	2.4%
Too hot	N/A	0.0%	2.7%	0.0%	5.5%	5.5	2.1%
Poor service	N/A	0.0%	0.0%	0.0%	3.2%	3.2	0.8%
Other	N/A	22.1%	22.2%	11.2%	14.5%	3.3	17.5%
No reason/No answer	N/A	38.7%	33.6%	49.8%	32.6%	- 17.2	38.7%
<u>When do you plan on returning to PBC?</u>							
Within the next 3 months	29.7%	33.4%	34.8%	34.0%	35.6%	1.6	33.5%
Within the next 6 months	13.5%	10.4%	11.4%	10.9%	12.7%	1.8	11.8%
Within the next year	25.0%	21.4%	23.8%	24.5%	21.7%	- 2.8	23.3%
Within the next few years	9.8%	7.0%	4.9%	4.7%	5.7%	1.0	6.4%
Don't Know	21.9%	27.8%	25.0%	25.9%	24.3%	- 1.6	25.0%

*Multiple responses accepted, added in May 2006



**Table 36
TRAVEL DETAILS**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
<u>Main Destination</u>							
Palm Beach County	91.4%	91.1%	90.0%	91.5%	92.4%	0.9	91.3%
Ft. Lauderdale	3.8%	4.2%	4.4%	3.2%	2.8%	- 0.4	3.7%
<u>First Trip to PBC</u>	26.6%	25.8%	24.1%	26.5%	25.6%	- 0.9	25.7%
<u>Type of Transportation*</u>							
Airplane	74.7%	79.1%	73.2%	75.7%	71.0%	- 4.7	74.7%
Car	24.9%	26.2%	31.5%	29.4%	33.3%	3.9	29.1%
Other	0.4%	0.9%	0.8%	0.6%	0.8%	0.2	0.7%

* Multiple responses accepted starting in October 2005.



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

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Climate/Weather	40.4%	38.1%	38.7%	39.5%	36.0%	- 3.5	38.5%
Beaches/Ocean	12.0%	12.2%	12.6%	13.1%	12.5%	- 0.6	12.5%
Beautiful Area	9.4%	6.4%	8.4%	7.3%	8.0%	0.7	7.9%
Relaxing Atmosphere	1.8%	3.3%	2.8%	4.0%	4.9%	0.9	3.4%
Visiting Friends/Relatives	4.0%	4.3%	4.0%	4.2%	4.3%	0.1	4.2%
Cleanliness	3.4%	4.0%	3.8%	3.3%	4.3%	1.0	3.8%
Nice People	4.4%	4.3%	4.7%	4.6%	3.5%	- 1.1	4.3%
Restaurants	2.3%	2.7%	2.4%	2.5%	2.8%	0.3	2.5%
Everything	1.9%	2.4%	1.9%	1.8%	2.2%	0.4	2.0%
Location	1.9%	1.0%	1.5%	2.4%	2.1%	- 0.3	1.8%
Golf	1.3%	1.9%	2.1%	1.4%	2.1%	0.7	1.8%
Hotel	3.2%	4.2%	3.0%	2.3%	2.0%	- 0.3	2.9%
Shopping	2.4%	1.5%	2.1%	1.4%	1.9%	0.5	1.9%
Other	11.0%	12.6%	10.8%	10.7%	12.1%	1.4	11.4%



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

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Traffic/Bad Drivers	32.4%	35.0%	34.5%	30.0%	26.2%	- 3.8	31.6%
Humidity/Poor Weather	16.3%	18.9%	16.2%	19.1%	19.9%	0.8	18.1%
Expensive	6.1%	4.7%	5.9%	5.5%	4.7%	- 0.8	5.4%
Crowded	4.3%	2.8%	2.3%	3.3%	2.5%	- 0.8	3.0%
Hotel	3.3%	2.9%	2.1%	1.6%	2.4%	0.8	2.5%
Unfriendly People	1.9%	1.4%	1.7%	2.3%	1.9%	- 0.4	1.8%
Stay Was Too Short	1.4%	2.3%	2.0%	2.4%	1.7%	- 0.7	2.0%
Road Construction	3.7%	3.6%	3.8%	3.2%	1.6%	- 1.6	3.2%
Other	19.3%	19.3%	22.2%	26.1%	27.6%	1.5	22.9%
Nothing Was Bad	11.4%	9.8%	10.6%	7.9%	12.9%	5.0	10.5%



**Table 39
DEMOGRAPHIC CHARACTERISTICS OF VISITORS**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Age							
Under 35	16.4%	17.1%	17.7%	16.3%	16.1%	- 0.2	16.7%
35 to 54	56.8%	54.7%	53.9%	54.8%	52.5%	- 2.3	54.5%
55 to 64	18.4%	20.0%	20.9%	20.6%	22.1%	1.5	20.4%
65 +	8.3%	8.3%	7.4%	8.3%	9.4%	1.1	8.3%
Description of traveling party* (Total)							
Adult family members or friends	44.1%	40.7%	40.6%	38.2%	41.9%	3.7	41.1%
Self only	29.9%	32.7%	33.6%	39.3%	39.4%	0.1	35.0%
Business associates	23.5%	25.6%	24.8%	21.4%	18.1%	- 3.3	22.7%
Children under 12 years old	8.9%	7.2%	7.5%	6.6%	7.1%	0.5	7.5%
Grandchildren under 12 years old	0.8%	0.5%	0.3%	0.1%	0.5%	0.4	0.4%
Description of traveling party* (Pleasure Hotel Guests)							
Adult family members or friends	81.7%	83.7%	82.4%	80.9%	78.9%	- 2.0	81.5%
Self only	9.8%	9.4%	11.8%	15.1%	16.9%	1.8	12.6%
Children under 12 years old	17.1%	15.5%	15.5%	14.4%	14.5%	0.1	15.4%
Business associates	2.1%	3.3%	3.4%	1.0%	1.7%	0.7	2.3%
Grandchildren under 12 years old	1.6%	1.3%	0.7%	0.3%	1.1%	0.8	1.0%
Description of traveling party* (Business Hotel Guests)							
Self only	44.6%	47.8%	48.1%	54.2%	56.6%	2.4	50.3%
Business associates	39.6%	40.1%	39.3%	33.9%	30.2%	- 3.7	36.6%
Adult family members or friends	16.2%	12.9%	12.7%	11.9%	13.9%	2.0	13.5%
Children under 12 years old	2.7%	1.8%	2.1%	2.0%	1.6%	- 0.4	2.0%
Grandchildren under 12 years old	0.2%	0.1%	0.0%	0.0%	0.1%	0.1	0.1%

* Multiple responses accepted



**Table 40
DEMOGRAPHIC CHARACTERISTICS OF VISITORS**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Occupation							
Professional/Managerial	53.1%	62.3%	63.6%	60.5%	61.4%	0.9	60.2%
Sales	16.3%	15.5%	14.7%	15.2%	15.5%	0.3	15.4%
Retired	9.2%	9.7%	8.5%	10.2%	11.2%	1.0	9.8%
Technical	6.6%	6.9%	7.1%	7.0%	6.2%	- 0.8	6.8%
Student	0.8%	1.2%	1.3%	1.0%	1.3%	0.3	1.1%
Other	13.9%	4.3%	4.8%	6.1%	4.4%	-1.7	6.7%
Hispanic Origin	N/A	5.3%	5.3%	5.7%	6.0%	0.3	5.6%
Ethnicity							
White/Caucasian	92.7%	92.4%	91.9%	91.6%	91.8%	0.2	92.1%
African-American	4.7%	4.2%	5.5%	5.5%	5.4%	- 0.1	5.1%
Asian	2.5%	3.1%	2.3%	2.6%	2.5%	- 0.1	2.6%
Other	0.1%	0.3%	0.2%	0.3%	0.3%	0.0	0.2%



**Table 41
DEMOGRAPHIC CHARACTERISTICS OF VISITORS**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Income							
Under \$45,000	4.8%	3.8%	4.9%	2.8%	4.4%	1.6	4.1%
\$45,000 to \$64,999	8.9%	9.6%	8.8%	7.6%	9.0%	1.4	8.8%
\$65,000 to \$99,999	23.7%	22.3%	21.8%	22.1%	20.2%	- 1.9	22.0%
\$100,000 to \$200,000	38.6%	41.0%	41.2%	42.7%	43.6%	0.9	41.4%
More than \$200,000	24.0%	23.2%	23.3%	24.9%	22.8%	- 2.1	23.6%
Gender							
Male	56.3%	58.4%	58.7%	60.4%	58.6%	- 1.8	58.5%
Female	43.7%	41.6%	41.3%	39.6%	41.4%	1.8	41.5%



**Table 42
PLACE OF ORIGIN OF VISITORS**

	2004/05	2005/06	2006/07	2007/08	2008/09	CHANGE	5 YEAR AVERAGE
Domestic	90.7%	91.0%	91.7%	89.1%	89.2%	0.1	90.3%
Florida	17.2%	17.9%	23.8%	20.6%	24.1%	3.5	20.7%
Southeast (excluding Florida)	15.7%	18.6%	16.4%	18.1%	16.1%	- 2.0	17.0%
Midwest	15.5%	15.2%	15.1%	13.0%	13.2%	0.2	14.4%
Middle Atlantic	14.1%	13.6%	13.8%	12.3%	13.2%	0.9	13.4%
New York	12.0%	11.6%	8.9%	10.8%	9.4%	- 1.4	10.5%
New England	8.4%	6.2%	7.2%	7.2%	7.1%	- 0.1	7.2%
Far West*	7.8%	7.8%	6.7%	7.0%	5.9%	- 1.1	7.0%
Region Unknown	0.1%	0.0%	0.0%	0.0%	0.1%	0.1	0.0%
International	9.3%	9.0%	8.3%	10.9%	10.8%	- 0.1	9.7%
Europe	4.8%	4.7%	3.7%	5.1%	4.4%	- 0.7	4.5%
- England/UK	2.7%	2.2%	1.6%	1.9%	1.5%	- 0.4	2.0%
- Germany	0.7%	0.8%	0.5%	0.8%	0.8%	0.0	0.7%
Canada	2.3%	2.0%	1.5%	2.7%	2.8%	0.1	2.3%
Latin America	1.6%	1.5%	2.2%	2.0%	2.6%	0.6	2.0%
Australia/Asia	0.4%	0.5%	0.6%	0.6%	0.7%	0.1	0.6%
Middle-East	0.2%	0.3%	0.1%	0.5%	0.2%	- 0.3	0.3%
Africa	0.0%	0.0%	0.1%	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 2008	FY Q2 Jan – Mar 2009	FY Q3 Apr – June 2009	FY Q4 July – Sept 2009	FYTD 2008 – 2009
Domestic	338,715	403,102	395,187	495,184	1,613,250
Florida	70,703	81,321	117,779	175,572	435,137
Mid-Atlantic	52,068	74,513	57,993	53,746	238,717
New York	37,270	54,969	35,274	43,714	170,138
New England	30,693	38,478	32,285	27,232	129,133
Southeast	69,607	62,298	60,982	103,910	291,927
Midwest	47,683	67,184	68,754	60,196	239,295
Far West	30,693	24,430	20,925	32,248	107,101
International	63,578	47,029	44,840	35,114	195,230
Europe	26,856	20,155	20,925	10,749	79,561
- Germany	7,125	4,886	1,794	1,433	14,688
- England/UK	6,029	4,886	9,566	5,733	26,316
Canada	16,442	11,604	11,359	8,599	49,573
Middle East	2,192	0	0	2,150	4,284
Australia/Asia	3,837	3,054	2,391	2,150	12,240
Africa	1,644	611	0	0	2,448
Latin America/Caribbean	12,606	11,604	10,164	11,466	47,125
Total Hotel Guests	402,293	450,131	438,831	531,732	1,808,480



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

	<u>FYTD 2004/05</u>	<u>FYTD 2005/06</u>	<u>FYTD 2006/07</u>	<u>FYTD 2007/08</u>	<u>FYTD 2008/09</u>	<u>Change</u>	<u>5 YEAR AVERAGE</u>
<u>Florida</u>	17.2%	17.9%	23.8%	20.6%	24.1%	3.5	20.7%
Business	11.6%	12.7%	15.4%	13.3%	14.7%	1.4	13.5%
Pleasure	5.3%	5.0%	8.0%	7.1%	9.1%	2.0	6.9%
<u>Southeast (excluding Florida)</u>	15.7%	18.6%	16.4%	18.1%	16.1%	- 2.0	17.0%
Business	11.0%	13.9%	11.6%	13.4%	11.3%	- 2.1	12.2%
Pleasure	4.5%	4.6%	4.7%	4.6%	4.6%	0.0	4.6%
<u>Midwest</u>	15.5%	15.2%	15.1%	13.0%	13.2%	0.2	14.4%
Business	9.3%	9.4%	9.1%	8.2%	7.5%	- 0.7	8.7%
Pleasure	6.2%	5.7%	5.9%	4.7%	5.7%	1.0	5.6%
<u>Mid Atlantic</u>	14.1%	13.6%	13.8%	12.3%	13.2%	0.9	13.4%
Business	5.7%	6.4%	6.6%	5.9%	6.0%	0.1	6.1%
Pleasure	8.2%	7.1%	7.0%	6.3%	7.1%	0.8	7.1%
<u>New York</u>	12.0%	11.6%	8.9%	10.8%	9.4%	- 1.4	10.5%
Business	4.3%	4.0%	3.6%	4.6%	3.5%	- 1.1	4.0%
Pleasure	7.6%	7.5%	5.2%	6.1%	5.8%	- 0.3	6.4%
<u>New England</u>	8.4%	6.2%	7.2%	7.2%	7.1%	- 0.1	7.2%
Business	4.1%	2.9%	3.6%	3.4%	3.0%	- 0.4	3.4%
Pleasure	4.2%	3.2%	3.5%	3.8%	4.2%	0.4	3.8%
<u>Far West</u>	7.8%	7.8%	6.7%	7.0%	5.9%	- 1.1	7.0%
Business	5.8%	6.2%	4.1%	4.9%	4.0%	- 0.9	5.0%
Pleasure	2.0%	1.5%	2.5%	2.0%	1.8%	- 0.2	2.0%



Table 45
ESTIMATED NUMBER OF HOTEL GUESTS BY MONTH AND FISCAL YEAR*
FISCAL YEAR 2004/05 THROUGH 2008/09

	2004/05	2005/06	2006/07	2007/08	2008/09	5 YEAR AVERAGE
October	209,111	174,451	179,304	165,958	121,817	170,128
November	171,572	236,465	157,976	166,206	124,523	171,348
December	191,254	185,917	178,856	150,171	163,183	173,876
January	183,476	204,363	213,212	191,699	149,761	188,502
February	176,446	186,071	192,706	197,339**	151,473	180,807
March	186,489	158,268	268,364	217,445	156,801	197,473
April	191,411	185,647	234,411	217,767	151,246	196,096
May	150,999	196,426	212,421	155,696	150,959	173,300
June	202,342	223,262	226,477	168,169	102,491	184,548
July	155,596	170,737	180,271	188,946	189,337	176,977
August	172,554	161,592	190,125	150,631	218,064	178,893
September	158,862	155,031	120,176	113,909	128,825	135,361

* 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.



Table 46
ACTIVITIES IN WHICH VISITORS PARTICIPATED THAT THEY WISH
THEY COULD HAVE DONE IN PBC

	2008/09
Going to the beach	14.5%
Golfing	12.5%
Fishing/Deep sea fishing	5.9%
Boating	4.3%
Snorkeling	3.2%
Relaxing	3.0%
Sightseeing/Visit historical sights	2.9%
Swimming	2.7%
Shopping	2.6%
Gambling	2.3%
Walk/run/workout	2.0%
Other	31.9%
No suggestions	12.0%



**Table 47
LAST VACATION DESTINATION+**

	2008/09
<u>Domestic</u>	<u>65.7%</u>
Florida	25.9%
Far West	16.2%
Southeast (Excluding Florida)	8.4%
New York	4.5%
New England	4.3%
Midwest	3.6%
Mid Atlantic	2.7%
<u>International</u>	<u>33.5%</u>
Latin America/Caribbean	15.8%
Europe	11.6%
England/UK	0.6%
Germany	0.2%
Australia/Asia	2.3%
Canada	2.2%
Middle East	1.1%
Africa	1.0%
<u>No Answer</u>	<u>0.3%</u>

+ Among vacation/leisure visitors only



**Table 48
OTHER VACATION DESTINATIONS CONSIDERED*+**

	2008/09
<u>Domestic</u>	<u>65.5%</u>
Florida	62.9%
Far West	2.1%
Southeast (Excluding Florida)	1.4%
New York	0.8%
Mid Atlantic	0.0%
Midwest	0.0%
New England	0.0%
<u>International</u>	<u>3.3%</u>
Latin America/Caribbean	2.7%
Canada	0.3%
Australia/Asia	0.3%
Europe	0.0%
Germany	0.0%
England/UK	0.0%
Africa	0.0%
Middle East	0.0%
<u>No other destinations</u>	<u>31.4%</u>

* Multiple responses accepted

+ Among vacation/leisure visitors only



**Table 49
COMPARISON OF PALM BEACH COUNTY TO LAST VACATION+**

	2008/09
<u>Being a great place to go again and again</u>	
Palm Beach County is much better	31.8%
Palm Beach County is about the same	59.9%
Palm Beach County is much worse	8.3%
<u>Being able to always find a new place to see or a new thing to do</u>	
Palm Beach County is much better	27.0%
Palm Beach County is about the same	62.0%
Palm Beach County is much worse	11.1%
<u>Being appreciated as a tourist or visitor</u>	
Palm Beach County is much better	31.0%
Palm Beach County is about the same	61.2%
Palm Beach County is much worse	7.8%
<u>Being a good value</u>	
Palm Beach County is much better	30.1%
Palm Beach County is about the same	60.9%
Palm Beach County is much worse	9.0%
<u>Being great for historical sights and places</u>	
Palm Beach County is much better	19.1%
Palm Beach County is about the same	58.8%
Palm Beach County is much worse	22.2%
<u>Being great for discovering nature-based activities/ecotourism</u>	
Palm Beach County is much better	30.1%
Palm Beach County is about the same	58.7%
Palm Beach County is much worse	11.2%
<u>Being great for museums and other cultural activities</u>	
Palm Beach County is much better	26.2%
Palm Beach County is about the same	58.2%
Palm Beach County is much worse	15.6%

+ Among vacation/leisure visitors only