2005 MARKET SURVEY

Conducted
July-August, 2005

Palm Beach International Airport
GATEWAY TO
the Best of Everything!

Submitted by:

CH2MHill | Ricondo & Associates | Quest Corporation of America, Inc.

Table of Contents

SECTION I: Executive Summary 4-8

Introduction 5
Survey Questionnaire 5
Survey Methodology 5-6
Survey Instruments 7-9
Summary of Findings 10-11

SECTION II-1. Travel Agencies 12-33
Gross Annual Sales 13
Corporate vs. Leisure Travel 14
PBI's Service Area 15
Domestic vs. International Travel 16
Use of PBI vs. FLL 17
Top Domestic Destinations 18
Top Domestic Airlines 19
Top International Destinations 20
Top International Airlines 21
International Gateways 22
Non-stop Service at PBI 23-24
PBI's Strengths 25
PBI's Advantages Over FLL 26
FLL's Advantages Over PBI 27
PBI's Advantages Over MIA 28
MIA's Advantages Over PBI 29
Fares: PBI vs. FLL 30
Destinations 31
PBI's Web Site 32
Use of NetJets 33

SECTION II-2. Hotels/Resorts 34-50
Corporate vs. Leisure Travel 35
Domestic vs. International Travel 36
Use of PBI vs. FLL 37
Top Domestic Airlines 38
Top International Airlines 39
Top Domestic Markets 40
Top International Markets 41
International Gateways 42
PBI Non-stop Service 43
Seasonal Effects 44
PBI's Benefits 45

Advantages of PBI Over FLL 46
Advantages of FLL Over PBI 47
Advantages of PBI Over MIA 48
Advantages of MIA Over PBI 49
Fares: PBI vs. FLL 50

SECTION II-3. Corporations 51-69
Annual Travel Budget 52
Importance of Air Travel to Your Business 53
Use of PBI vs. FLL 54
Top Airlines 55
Preferred Provider Contracts 56
Top Domestic Destinations 57
Top International Destinations 58
International Gateways 59
Need for Additional Domestic Destinations 60
PBI's Benefits 61
Advantages of PBI Over FLL 62
Advantages of FLL Over PBI 63
Advantages of PBI Over MIA 64
Advantages of MIA Over PBI 65
Fares: PBI vs. FLL 66
Use of PBI Web Site 67
Use of NetJets 68
Use of Corporate Jets 69

SECTION III: Survey Comments 70-71

SECTION IV: Appendix — Raw Data 72-84

Palm Beach International Airport
GATEWAY TO
the Best of Everything!

2005 Market Awareness Survey

SECTION I

Overview and Survey Methodology

Palm Beach International Airport
Market Awareness Survey

INTRODUCTION: In an effort to plan for future needs at The Palm Beach International Airport (PBI), a Market Awareness Survey was conducted targeting travel agencies, hotels/resorts and corporations. The surveys were conducted from July 22 through August 31, 2005.

Questions for the survey were developed and tailored to each targeted group to help inform PBI on how its airport services and facilities are perceived and utilized. Also important to PBI is how it compares with other area airports, what factors motivate passengers to use PBI over other airports in the area, and what services passengers would like to see added at PBI.

SURVEY QUESTIONNAIRE: Three separate survey instruments were developed, one each for travel agencies, hotels/resorts, and businesses. The travel agency survey contained 18 questions, the hotel/resort survey contained 16 questions, and the business survey contained 15 questions. All of the questions were presented in an open-ended format to encourage respondents to divulge as much information as necessary to fully respond to the questions.

The survey was designed to solicit the maximum amount of usable information critical for future planning efforts. The surveys sought information on a number of issues pertinent to future growth and development at PBI, including:

- Geographic origination of passengers
- Most popular destinations
- International vs. domestic business
- Travelers' choice of airlines
- Impact of seasonality to business
- Advantages of PBI over other airport services
- Advantages of other airports over PBI
- Corporate jet service

A copy of the survey instruments can be found on pages 7-9.

SURVEY METHOD: Input was sought from the Palm Beach Convention and Visitor's Bureau, Business Development Board and Workforce Development Board to help identify the travel agencies, hotels/resorts, and corporations in PBI's market area that would provide a representative sampling of the airport's customers and potential customers. To expand on information gleaned in similar surveys in past years, PBI decided to expand the survey effort beyond just Palm Beach County, and into the surrounding counties of Martin, St. Lucie, and Indian River. Local chambers of commerce, economic development councils and business leadership groups in those counties were consulted to help identify potential survey respondents in those counties. The targeted respondents varied in size, business focus, geographic location and revenues to help ensure a representative sample of PBI's market service area.

A survey team manager contacted each of the targeted respondents, either by phone or in person, and explained what the survey was for and solicited their participation. The survey manager then made appointments to meet personally with those respondents to conduct the survey. In most cases, the survey was conducted in person or by telephone. In a few cases, respondents indicated that their schedules were time-constrained and preferred to simply fill out a survey questionnaire and return it with their answers.

Following is a breakdown of the survey respondents:

Eight Travel Agencies

Including five from Palm Beach County and one each from Martin, St. Lucie and Indian River counties.

Seven Hotels/Resorts

Including four from Palm Beach County and one each from hotel/resort from Martin, St. Lucie and Indian River counties.

Eight Corporations/Businesses

Including eight from Palm Beach County and one each from Martin, St. Lucie and Indian River counties.

TRAVEL AGENCIES SURVEY

1. What were your gross annual sales revenues last year?
2. What percentage of your air travel reservations business is generated by corporate air travelers vs. leisure air travelers?
3. What do you consider to be PBI's service area?
4. What percentage of your business is for domestic air travel vs. international air travel?
5. Please estimate your flight scheduling for air travel. What percentage do you book through PBI vs. FLL? Does seasonality affect those percentages?
6. What are the top 10 domestic destinations for air travel via PBI booked through your agency?
7. What are the top airlines for domestic travel via PBI booked through your agency?
8. What are the top international destinations for air travel via PBI booked through your agency?
9. What are the top airlines for international travel via PBI booked through your agency?
10. Please estimate your flight reservations through international gateways. What are the primary gateway cities from PBI for popular international destinations?
11. Please comment on existing non-stop service out of PBI. Is it adequate to meet the needs? What changes, additional destinations or increased frequencies would be economically viable and better serve the needs of travelers in the Palm Beach County area?
12. What attributes of PBI do you like?

a. Location
b. Easy access to I-95
c. Parking
d. Terminal
e. Speed of passenger processing
f. Other: (please explain)

13. What advantages does PBI have for your clients over FLL?
14. What advantages does FLL have for your clients over PBI?
15. What advantages does PBI have for your clients over MIA?
16. What advantages does MIA have for your clients over PBI?
17. How do you feel fares at PBI compare with those at FLL? What impact does this have on which airport your clients travel through?
18. Would you please provide us with a one-year summary of airport (PBI or FLL) and city (destinations) that your agency has booked?

HOTELS / RESORTS SURVEY

1. What percentage of your bookings is corporate vs. leisure?
2. What percentage of your bookings is domestic vs. international?
3. What percentage of your air travel guests use PBI vs. FLL?
4. Which airlines are your domestic guests using?
5. Which airlines are your international guests using?
6. What are the top domestic markets (origins of your domestic air travel guests)?
7. What are your top international markets (origins of your international air travel guests)?
8. What gateway cities are your international air travel guests using?
9. Please comment on existing non-stop service out of PBI. Is it adequate to meet the needs? What changes, additional destinations or increased frequencies would be economically viable and better serve the needs of travelers in the Palm Beach County area?
10. Do you see a seasonal variation in the tourism market in Palm Beach County? If so, please discuss.
11. What attributes of PBI do you like?

a. Location
b. Easy access to I-95
c. Parking
d. Terminal
e. Speed of passenger processing

Other: (please explain)

12. What advantages does PBI have for your guests over FLL?
13. What advantages does FLL have for your guests over PBI?
14. What advantages does PBI have for your guests over MIA?
15. What advantages does MIA have for your guests over PBI?
16. How do you feel fares at PBI compare with those at FLL? What impact does this have on which airport your guests travel through?

CORPORATIONS SURVEY

1. How much money do you spend annually for corporate air travel?
2. How important is convenient and efficient air service to your operations?
   A. Critical B. Important C. Somewhat important D. not important
   (Please explain)

3. What percentage of your company's corporate flights occur through PBI vs. FLL?
4. Which is your primary carrier? Why?
5. Do you have preferred provider contracts with that carrier?
6. What are your top domestic destinations for corporate travel within your company?
7. What are your top international destinations for corporate travel within your company?
8. Please estimate your use of international gateways. What international gateways does your company use for international travel?
9. Are there domestic locations you would like to see PBI add new or increased non-stop service to? Which ones?
10. What attributes of PBI do you like?

a. Location
b. Easy access to I-95
c. Parking
d. Terminal
e. Speed of passenger processing
f. Other: (please explain)

11. What advantages does PBI have for you over FLL?
12. What advantages does FLL have for you over PBI?
13. What advantages does PBI have for you over MIA?
14. What advantages does MIA have for you over PBI?
15. How do you feel fares at PBI compare with those at FLL? What impact does this have on which airport you travel through?

SUMMARY OF FINDINGS: Palm Beach International Airport is seen throughout the community and the greater Palm Beach area as being a high-quality airport that distinguishes itself by offering easy accessibility, friendly service, and fewer hassles than its neighboring airports. When given a choice of PBI or Fort Lauderdale/Hollywood International Airport (FLL), passengers prefer to use the smaller, quieter PBI, based on the results of surveys of area business and economic leaders, hoteliers and resort operators, and travel agents. PBI's greatest weakness is that is does not have as extensive a flight schedule as some of its neighboring airports. Frequently when passengers choose FLL or Miami international Airport (MIA) over PBI, it is because PBI doesn't offer direct flights to their destination, or those flights aren't frequent enough.

PBI draws nearly two-thirds of its business from Palm Beach County, with the remainder coming primarily from Martin, St. Lucie, Indian River, and Okeechobee counties.

The Northeast is the most popular domestic destination for people flying from PBI, while international travelers favor the Bahamas, London, Rome, and Tokyo. Respondents noted travel to Central America and South America is on the rise, and travel agents commented that travel to Australia and New Zealand is becoming increasingly popular for South Florida travelers. MIA is a major gateway airport for South Florida travelers traveling to many international locations, particularly South and Central America; many passengers traveling to those countries prefer to fly directly from Miami, the survey found.

Respondents said there is a need for more direct flights from PBI to New York, Boston, and Philadelphia. Respondents also said PBI would benefit from adding more international flights to destinations including London, the Bahamas and Central and South America. Currently, most passengers in PBI's service area are traveling to FLL or MIA to fly internationally.

PBI's location, its terminal and its easy access to I-95 are the traits most often cited as the airport's biggest advantages over other area airports. Passengers prefer to use PBI rather than drive through congested traffic to get to FLL and MIA. They also generally prefer PBI's airport facilities, which are seen as smaller, quieter, and less stressful. However, some passengers will use the other airports if they can get lower fares or better flight schedules than those at PBI. There is a perception among hoteliers and travel agencies that lower fares are available at FLL. The survey found that the breaking point for leisure travelers to choose lower fares over ease of travel — using other airports over PBI — is when the ticket price at PBI is $50 or more higher than at FLL. Businesses, however, did not report fares as a deciding factor in their selection of airports. It is interesting to note that 86% of the air travel booked by the surveyed corporations in Palm Beach, Martin, St. Lucie, Indian River and Okeechobee counties is booked through PBI. When passengers do use FLL or MIA over PBI, it is normally because of flight schedules. Several respondents noted that FLL and MIA have more flights, more often, to more locations.

Palm Beach area businesses report very little use of private corporate jets. A few said they use NetJets occasionally, but most use commercial carriers for their air travel. Reinforcing a common theme that emerged in the survey, one major corporation respondent that reported using corporate jets occasionally said this was an area that could be boosted if PBI would market the benefits of corporate jet travel, such as the flexibility in departure and arrival dates/times, convenience of parking your car and having a short walk to the terminal, and the ease of passenger processing. The respondent said PBI does a great job of marketing to corporations that move into the area, but does not market well to existing corporations to build and keep that corporate business.

Many respondents offered suggestions on ways to improve PBI's market share of air traffic in the South Florida region. Believing that PBI has a strong product to offer — its convenience, friendly atmosphere and nice terminal — respondents suggest new marketing efforts should be undertaken. One suggested that PBI should tie its marketing in with activities happening throughout the area, and

sponsor promotions with major league sports teams, cultural events or business expos. Hoteliers and travel agents suggested partnering with area attractions and the region's major events to put together packages to include event ticket prices, hotel rates, airfare and shuttle service (or other type of transportation). These opportunities, they said, would build a stronger tie to the community and result in more "return" traffic. Also, three respondents who booked primarily corporate travel said they were beginning to see an increase in travelers who brought their families along while they attended a conference, expo or meeting, which presents another marketing opportunity for the airport, in conjunction with the Convention and Visitors Bureau or similar agency. With creative marketing, PBI could create a "branding" for itself, further solidifying its spot as the friendly, hassle-free, airport that cares about its passengers and works with them to create a complete experience, rather than just shuffling them through to their planes.

Travel agents suggested aggressive marketing to travelers from Europe and South America, attracting more of those visitors to PBI.

Several respondents said PBI needs to do a better job of maintaining communication with the communities it serves, in order to anticipate future needs and respond to them quickly and efficiently. Some respondents suggested that PBI hold periodic meetings with area businesses to maintain open communication with them and to help identify trends and opportunities for economic development. While they appreciated the opportunity to participate in the survey, some respondents said they feel disconnected from the airport because they aren't typically involved in conversations about the airport. They said airport leaders need to be more visible and active in the business community, in order to increase and maintain PBI's outreach with major corporations in the region. Among the suggestions were hosting small focus groups or informal "coffee" meetings with economic development boards, local Chambers of Commerce, and the Visitors and Convention Bureau.

Many other airports in Florida network this way, and also form their own "Working Groups" or "Expert Panels," made up of community leaders. They meet periodically with these groups to discuss the local business climate. This allows them to engage in two-way communication and more fully understand the business climate, which would influence air travel and may offer opportunities for new markets or more frequent service to existing markets. For example, one respondent said, by having PBI leaders playing an active role in business and community groups, they would have had plenty of advance information that Scripps was coming to the area, which presented an opportunity for PBI pursue having an airline offering non-stop flights to San Diego.

Several respondents also suggested the airport conduct a series of focus groups throughout the communities it serves to help make sure people in the area are updated on what's going on at the airport, planned projects, new air carriers, new routes or frequencies, terminal additions, construction, etc. The survey found that people in PBI's service area feel a sense of "ownership" to the airport, and think of it as "their" airport. That presents PBI with a unique opportunity to capitalize on that sentiment to continue building more support for the airport as it expands.

The survey also identified a potential new competitor for PBI. Traditionally, PBI has seen FLL and MIA as its primary competitors for commercial aviation. However, the survey found that for travelers in Indian River County, part of PBI's secondary market service area, Orlando International is a viable option over PBI, assuming ticket prices are comparable and flight schedules are the same or better. Those travelers would rather drive north to Orlando than battle the congestion on I-95 to get to FLL or Miami. PBI's smaller size still offer an advantage over MCO, which is Florida's busiest airport; PBI is still seen as easier to get to and less confusing for travelers.

The following pages detail all the results of the Market Survey.

Palm Beach International Airport
GATEWAY TO
the Best of Everything!

2005 Market Awareness Survey

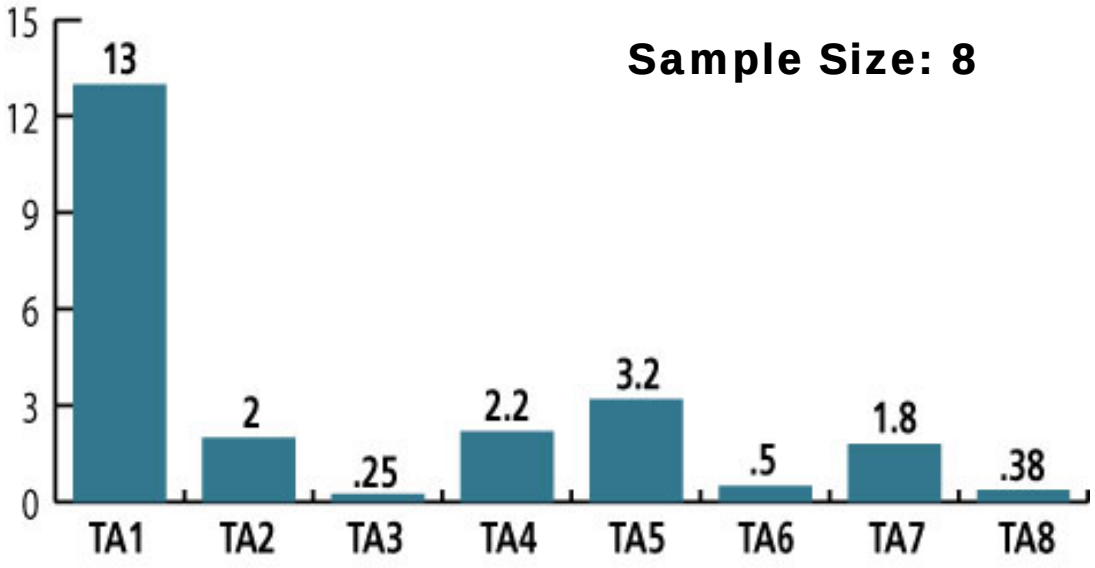
SECTION II-1

Travel Agencies

Travel Agencies:
Gross Annual Sales

Survey Question 1: What were your gross annual sales revenues last year?

Survey respondents reported average sales of $2.9 million and total sales of $23.8 million. The smallest travel agency responding posted total gross sales in 2004 of $250,000, and the largest posted sales of $13 million.



GROSS ANNUAL SALES REVENUES
(in millions)

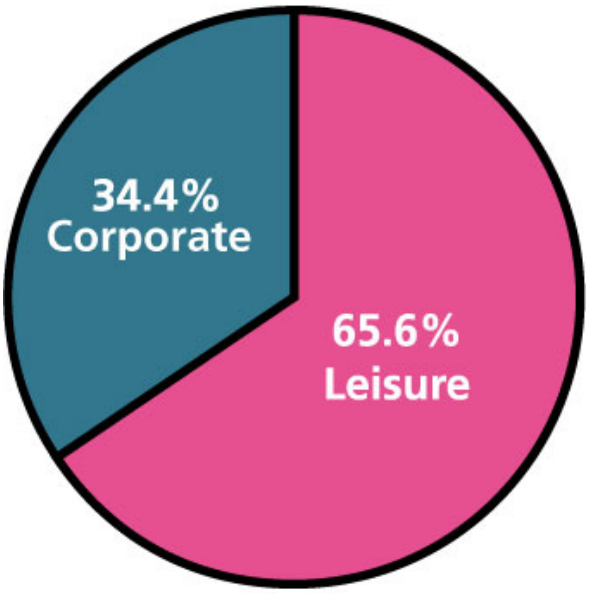
Travel Agencies:

Corporate vs. Leisure Travel

Survey Question 2: What percentage of your air travel reservations business is generated by corporate air travelers vs. leisure air travelers?

Travel agents in Palm Beach County and surrounding counties report that most of the air travel they book for clients through PBI is leisure travel. The survey found that 65.6% of air travel is leisure, and 34.4% is business. Two respondents — one in Palm Beach and one in Indian River County — said that all the travel they book for clients through PBI is leisure travel.

Sample Size: 8



CORPORATE VS. LEISURE TRAVEL

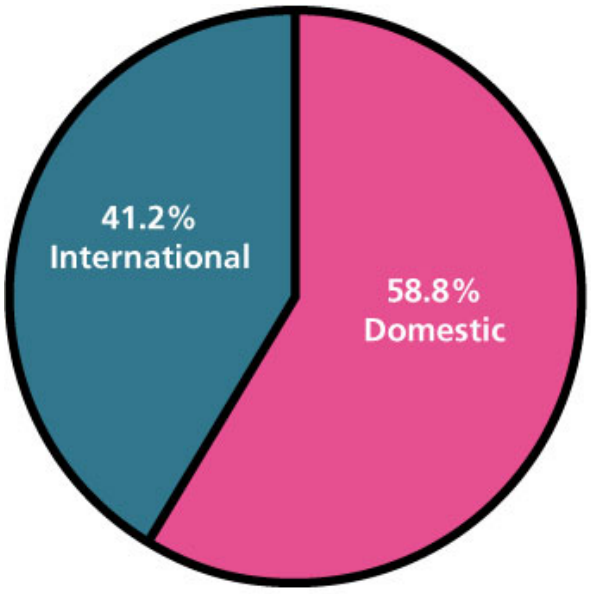
Travel Agencies:

Domestic vs. International Travel

Survey Question 4: What percentage of your business is for domestic vs. international air travel?

Respondents reported that 58.8% of the travel they book through PBI is domestic, compared with 41.2% that is international. Five of the eight respondents report that the majority of the travel they book at PBI is domestic. Three survey respondents (38%) said that the business they book at PBI is evenly divided between domestic and international flights.

Sample Size: 8



DOMESTIC VS. INTERNATIONAL TRAVEL

Travel Agencies:

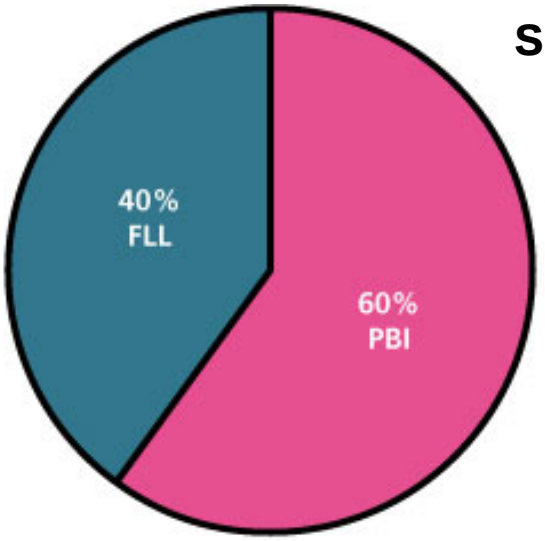
Use of PBI vs. FLL

Survey Questions 5a, 5B:
What percentage of air travel do you book through PBI vs. FLL?
Does seasonality affect the percentage of travel you book through PBI over FLL?

Survey respondents were asked to compare the number of flights booked through PBI as compared with FLL. Respondents said that an average of 60% of the flights they book in the area are through PBI over FLL. Palm Beach agents report their percentage of flight scheduling at PBI to range from 50% to 75%. Respondents from Martin County said they book 65% of travel through PBI instead of FLL, and St. Lucie County respondents book 75% of travel through PBI instead of FLL. The respondent from Indian River County said 25% of the air travel booked there is done through PBI, because most of that agency's clients prefer Orlando International Airport. This finding is interesting because PBI has historically viewed FLL and MIA as its primary competitors for air travel in South Florida. However, for residents of Indian River County, which is in PBI's secondary market service area, traveling to MCO is a viable option, particularly if flight schedules are better and ticket prices comparable.

Respondents report that seasonal fluctuations do impact the amount of travel booked through PBI. Respondents said that flights to the Northeast are heavily booked during peak season, which is generally considered to be mid- to late-October through early April. Three of the eight respondents reported their use of PBI was higher during peak season because of the general increase in flights during that time. All eight respondents reported a large demand for direct flights to the Northeast during peak season. Five respondents said they see an increase in demand for international travel during the summer months, but said they use FLL or MIA for the majority of those flights.

Sample Size: 8



USE OF PBI VS. FLL (% OF FLIGHTS BOOKED)

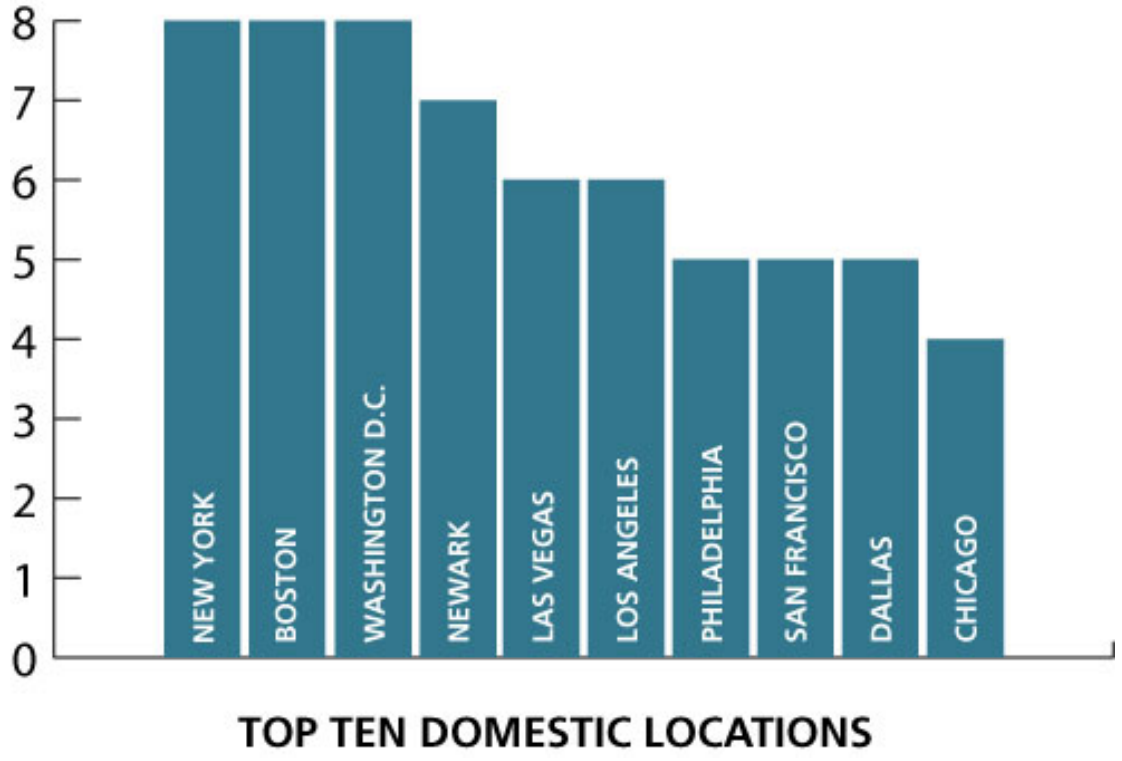
Travel Agencies:

Top Domestic Destinations

Survey Question 6: What are the top 10 domestic destinations for air travel via PBI booked through your agency?

The Northeast is a popular destination for flights booked out of PBI, respondents reported. The top domestic destinations are: New York (8 respondents), Boston (8), Washington DC (8), Newark (7), Las Vegas (6), Los Angeles (6), Philadelphia (5), San Francisco (5), Dallas (5), and Chicago (4). Other cities cited include Atlanta (3), Houston (3), and Denver (3) (during the winter season).

Sample Size: 8



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

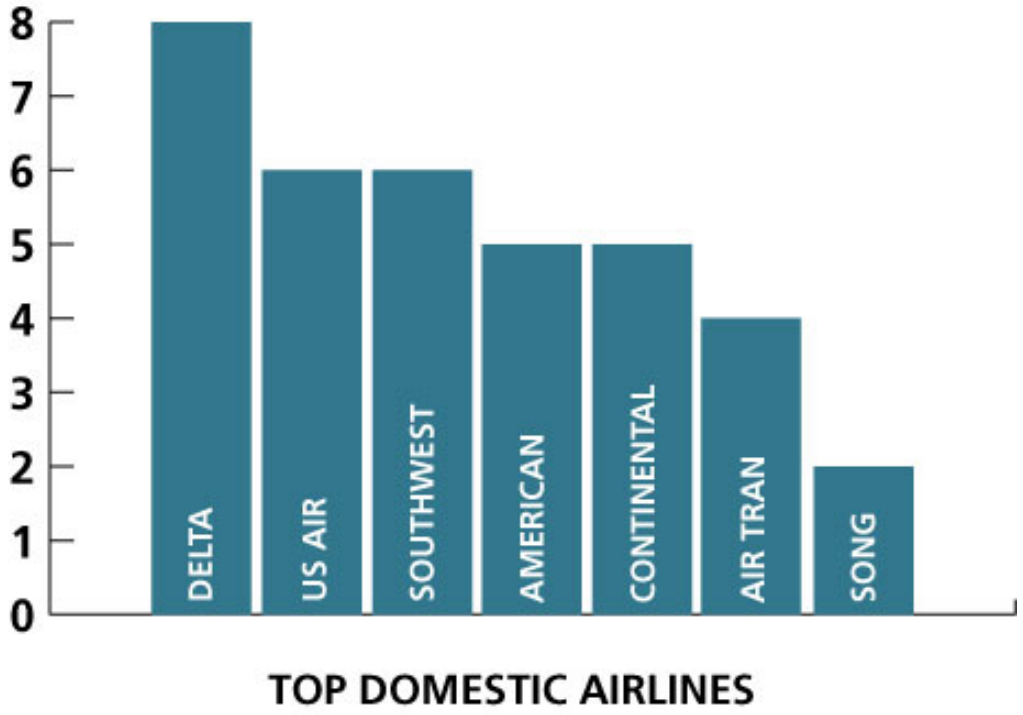
Travel Agencies:

Top Domestic Airlines

Survey Question 7: What are the top airlines for domestic travel via PBI booked through your agency?

Delta is the most popular airline for travel agents booking clients through PBI, the survey found. All eight respondents listed Delta among the airlines they book through PBI. Six respondents listed US Air and Southwest, five listed American and Continental, four listed Air Tran, and two listed Song, which is also a Delta airline.

Sample Size: 8



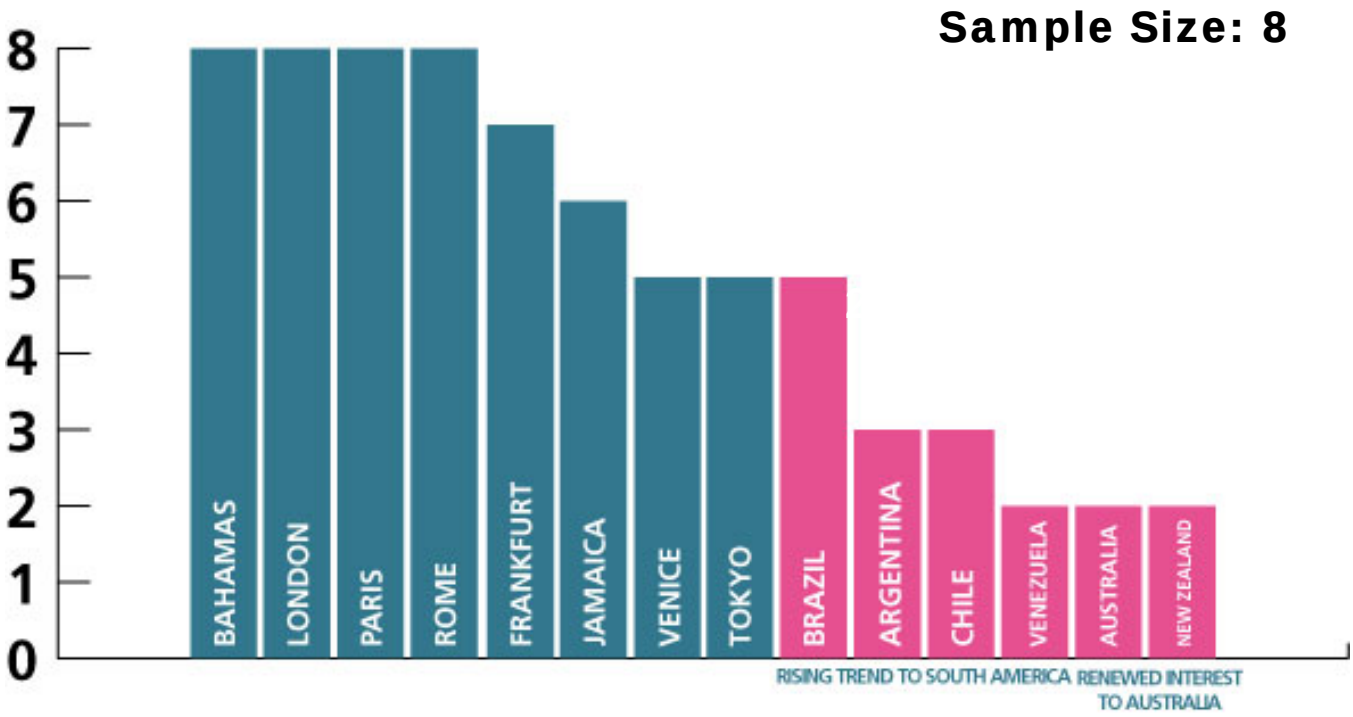
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Travel Agencies:

Top International Destinations

Survey Question 8: What are the top international destinations for air travel via PBI booked through your agency?

Most of the international flights booked through PBI are heading to the Bahamas, London, Paris or Rome, the survey found. All eight respondents listed those cities as being among the top international destinations for air travel in the South Florida area. Seven of the respondents listed Frankfurt, six listed Jamaica, and five listed Venice, Tokyo and Brazil. The respondents noted that travel to Central and South America is on the rise; three respondents listed Argentina and Chile as top international destinations, and two listed Venezuela. Also getting mentioned by two respondents were Australia and New Zealand, which the respondents noted are seeing renewed interest among international air travelers in South Florida.



TOP INTERNATIONAL DESTINATIONS

Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

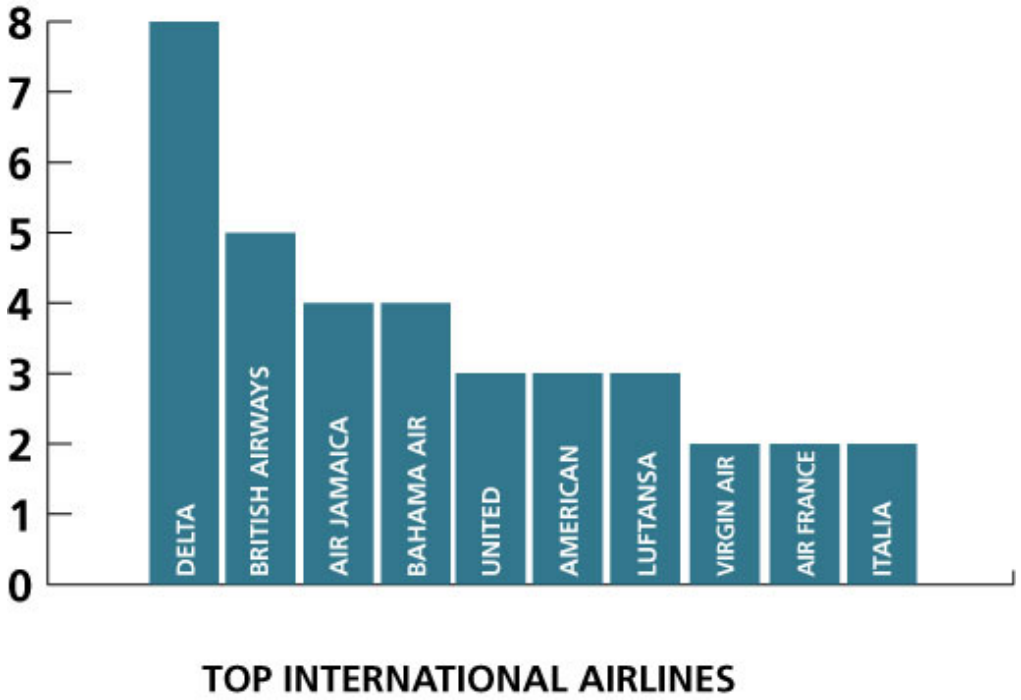
Travel Agencies:

Top International Airlines

Survey Question 9: What are the top airlines for international travel via PBI booked through your agency?

Delta is the most popular airline for international flights booked through PBI, the survey found. All eight respondents listed Delta among the top international airlines at PBI. Five respondents listed British Airways, four listed Bahamas Air and Air Jamaica, three listed United, American, and Luftansa, and two listed Virgin Air, Air France, and Italia.

Sample Size: 8



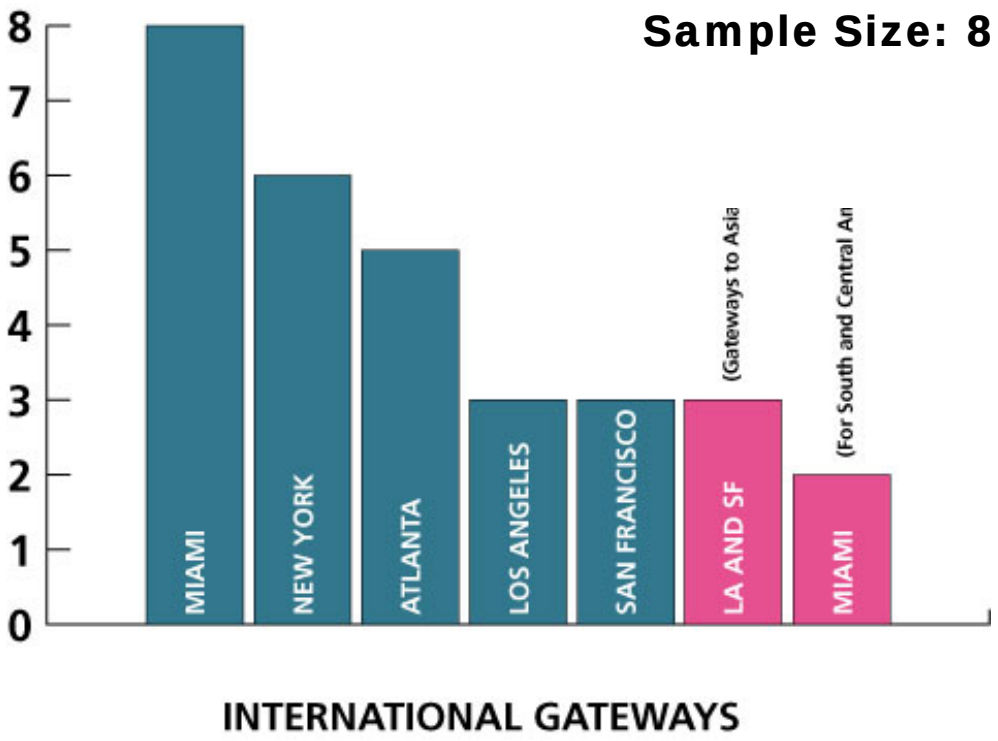
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Travel Agencies:

International Gateways

Survey Question 10: Please estimate your flight reservations through international gateways. What are the primary gateway cities from PBI for popular international travel?

The survey found that the primary international gateway used by PBI passengers is Miami International (MIA), with all eight respondents listing Miami as an international gateway from PBI. Six respondents listed New York, five listed Atlanta, and three listed San Francisco and Los Angeles. Respondents noted that Miami is generally the gateway for travel to South and Central America, and Los Angeles and San Francisco are gateways for travel to Asia.



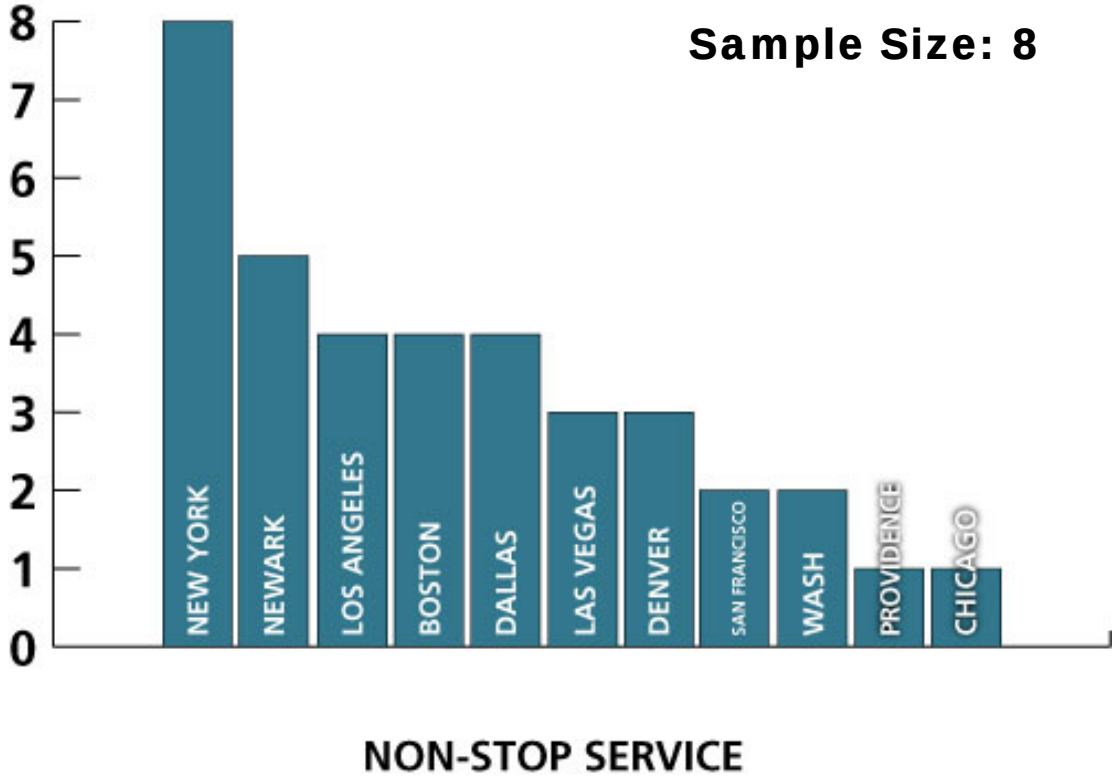
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Travel Agencies:

Non-stop Service at PBI

Survey Question 11: Please comment on existing non-stop service out of PBI. Is it adequate to meet the needs? What changes, additional destinations or increased frequencies would be economically viable and better serve the needs of travelers in the Palm Beach County area?

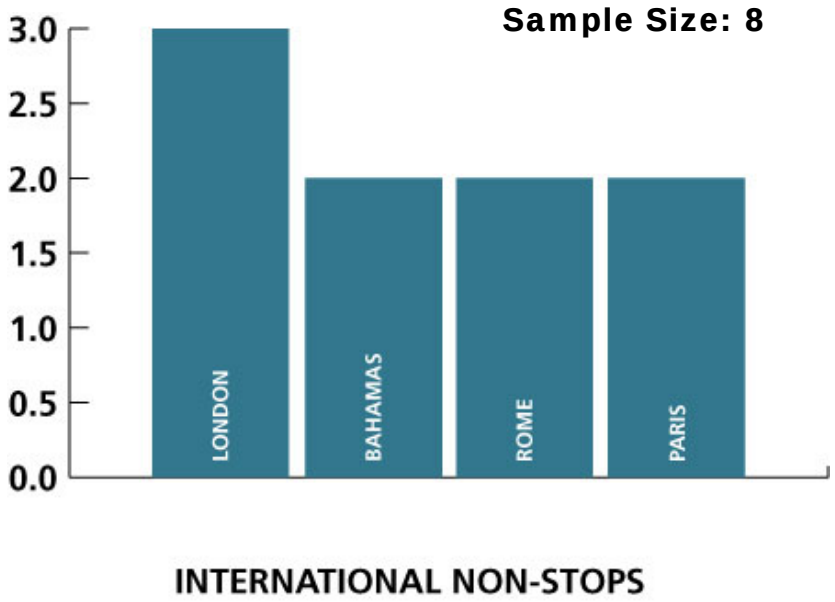
All eight respondents identified a need for an increase in the number of direct flights from PBI, as well as increased frequency in those flights. All eight respondents cited New York as the top destination where additional non-stops and more frequent service are needed. Five respondents listed Newark, four listed Los Angeles, Boston, and Dallas, three listed Las Vegas and Denver, two listed San Francisco and Washington DC, and one listed Providence and Chicago. Additionally, respondents said non-stop flights to several international locations also would be beneficial. Those included London (3 respondents), Bahamas (2), Rome (2) and Paris (2). Five respondents (40%) said that non-stop flights are extremely important to business travelers.



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Travel Agencies:
Non-stop Service at PBI
(Continued)

Survey Question 11: Please comment on existing non-stop service out of PBI. Is it adequate to meet the needs? What changes, additional destinations or increased frequencies would be economically viable and better serve the needs of travelers in the Palm Beach County area?



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Travel Agencies:

PBI's Strengths

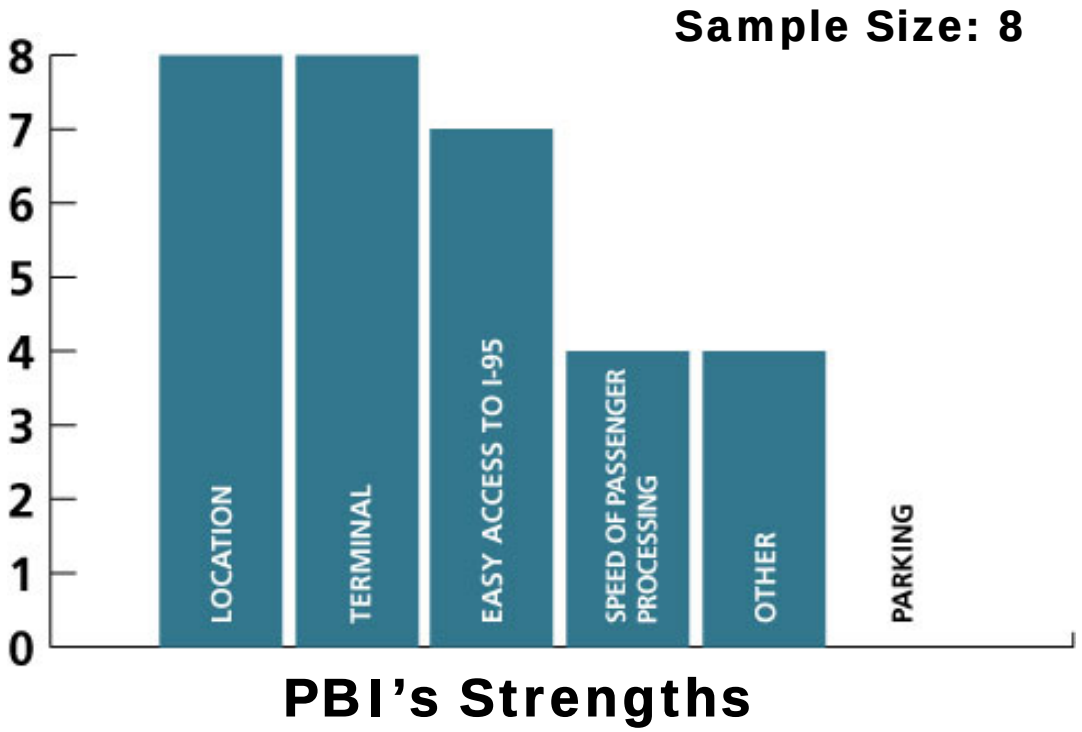
Survey Question 12: What attributes of PBI do you like? A. Location; B. Easy access to I-95; C. Parking; D. Terminal; E. Speed of passenger processing; F. Other: (Please explain)

Survey respondents believe that location and PBI's terminal are its biggest strengths. All eight respondents listed those two features as being strengths. Seven respondents listed the airport's easy access from the interstate as being an advantage, four listed the speed of passenger processing, and four listed "other." Those listing "other" commented on the airport's variety of shops and restaurants.

One respondent commented that the current road construction south of the airport is temporarily causing some travelers to use FLL instead of PBI, to avoid the construction. Two respondents referred to PBI as "comfortable and pretty."

None of the respondents listed parking as being one of PBI's advantages. Five respondents, in fact, said that airport parking needs improvement, particularly during the peak season (October through April) and around the holidays.

One respondent said seniors like using PBI because "it is easier to get around because everything is self-contained and not spread out throughout the airport." One respondent, who books a substantial amount of corporate travel, said she received great feedback regarding PBI's new wing and business support services available to travelers—specifically the airport's free wireless Internet connection.



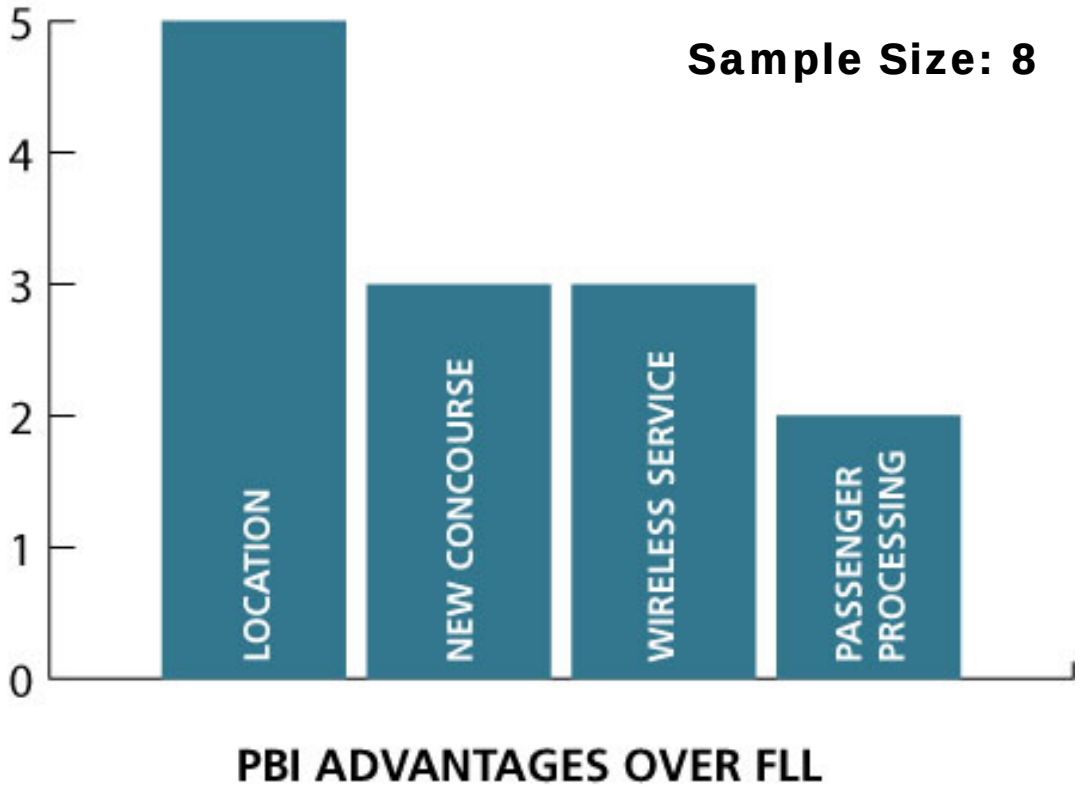
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Travel Agencies:

PBI's Advantages Over FLL

Survey Question 13: What advantages does PBI have for your clients over FLL?

PBI's location and easy access from the interstate were cited repeatedly by survey respondents as being PBI's best advantages over FLL. Respondents also listed PBI's free wireless internet availability, Southwest's non-stop service to New York, and efficient processing as being key advantages. "You can give people simple directions because it is right off I-95," one respondent said. "There's a big seniors market here, so that's important." Another respondent commented, "The airport is smaller, so passengers can get from check-in to the plane easier."



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

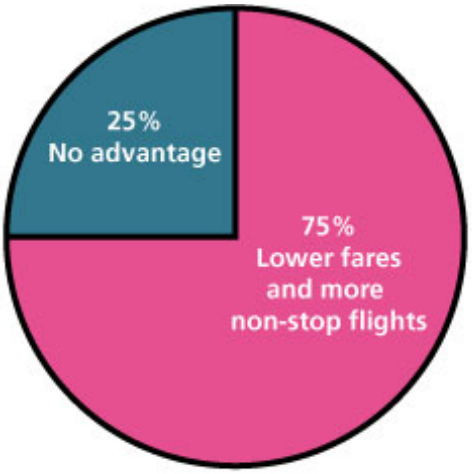
Travel Agencies:

FLL's Advantages Over PBI

Survey Question 14: What advantages does FLL have for your clients over PBI?

Six respondents (75%) cited lower fares and more available non-stop flights to popular destinations as advantages of FLL over PBI. Two respondents (25%) said FLL has no advantages over PBI. Two respondents said they do not like FLL and only book flights there when their clients insist. One respondent said he has gotten numerous complaints about FLL and noted that it is farther away than PBI for most of his clients.

Sample Size: 8



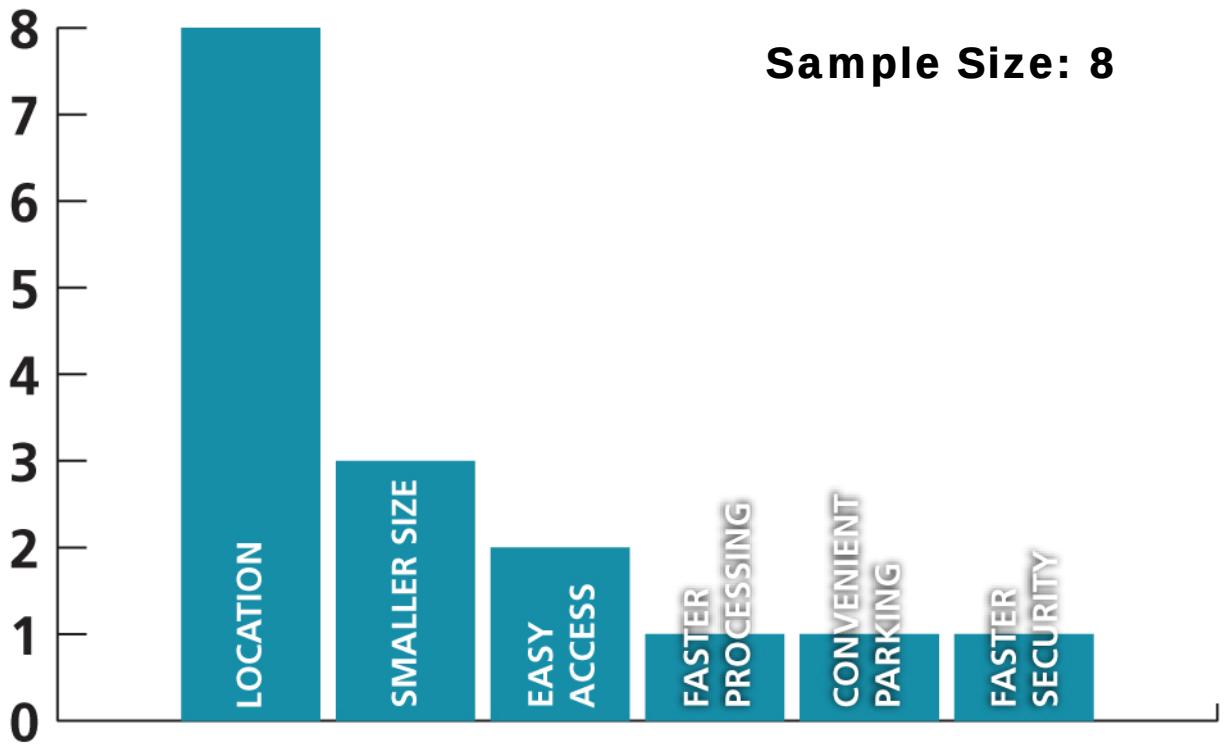
FLL ADVANTAGES OVER PBI

Travel Agencies:

PBI's Service Area

Survey Question 15: What advantages does PBI have for your clients over MIA? ?

All eight respondents said PBI's biggest advantage over MIA is its location. Three respondents also said PBI's smaller size is an advantage, and two said PBI is easier to travel to. One respondent said PBI's processing is faster and easier; one said passengers can get from their cars to the planes with less hassle than at MIA; and one noted that the security and ticket processing is faster at PBI.



PBI ADVANTAGES OVER MIA

Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Travel Agencies:

MIA's Advantages Over PBI

Survey Question 16: What advantages does MIA have for your clients over PBI?

All eight survey respondents said the number of international flights is MIA's primary advantage over PBI.

MIA'S ADVANTAGES OVER PBI

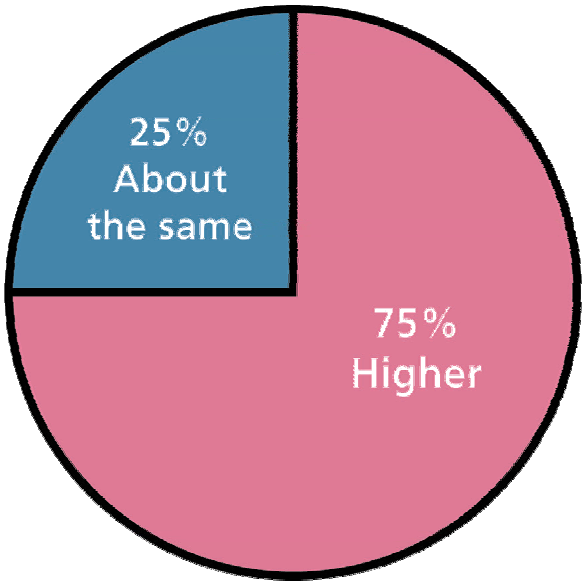
Travel Agencies:

Fares: PBI vs. FLL

Survey Question 17: How do you feel fares at PBI compare with those at FLL?

Six respondents (75%) said fares are often higher at PBI than fares at FLL, although they noted that the gap is closing. Two respondents (25%) said PBI's fares are competitive with FLL's. All eight respondents noted that if fares are $50 higher than at other airports, it impacts travelers' willingness to use PBI.

Sample Size: 8



Fares: PBI vs. FLL

Travel Agencies:

Destinations

Survey Question 18: Can you provide us with a one-year summary of airport (PBI or FLL) and city destinations that your agency has booked?

None of the respondents said they were able to provide a one-year summary of destinations booked, due to the amount of time it would take to research that information, which they reported is not kept readily available. However, they reported that the current top destinations they book have been relatively consistent over the past year. (See survey question 6 and survey question 8).

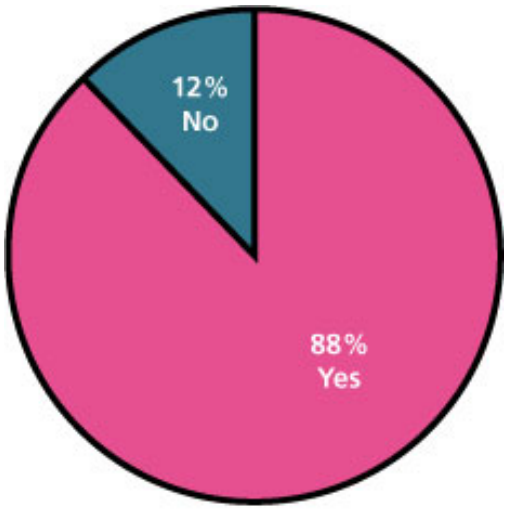
Travel Agencies:

PBI's Web Site

Survey Question 19: Have you used the "flight schedules" feature on PBI's Web site? If so, do you find it useful? What improvements might make it more useful?

Seven respondents (88%) said they use PBI's Web-based flight schedule feature often. Two of those respondents said they don't trust the Web-based feature for "real time" data, but could offer no specific recommendation for improvement. One respondent said they use the site "just to see what the options are," but added that they "don't depend on the times. Don't feel the time schedules are reliable."

Sample Size: 8



USE OF PBI WEBSITE

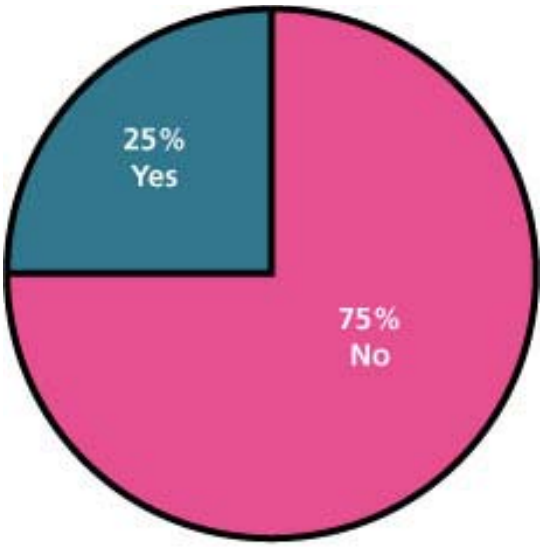
Travel Agencies:

Use of NetJets

Survey Question 20: Are you using NetJets? Are those flights being made through PBI? How many, on average, do you book per month?

Respondents were asked about their usage of NetJets, one of the largest fractional jet ownership companies for corporate and leisure travel. Of the eight respondents, six (75%) said they never use NetJets. Two respondents said they had used NetJets a few times, but don't expect to use it frequently in the future. One respondent, who primarily books leisure travel, said he had never heard of NetJets.

Sample Size: 8



Use of NetJets

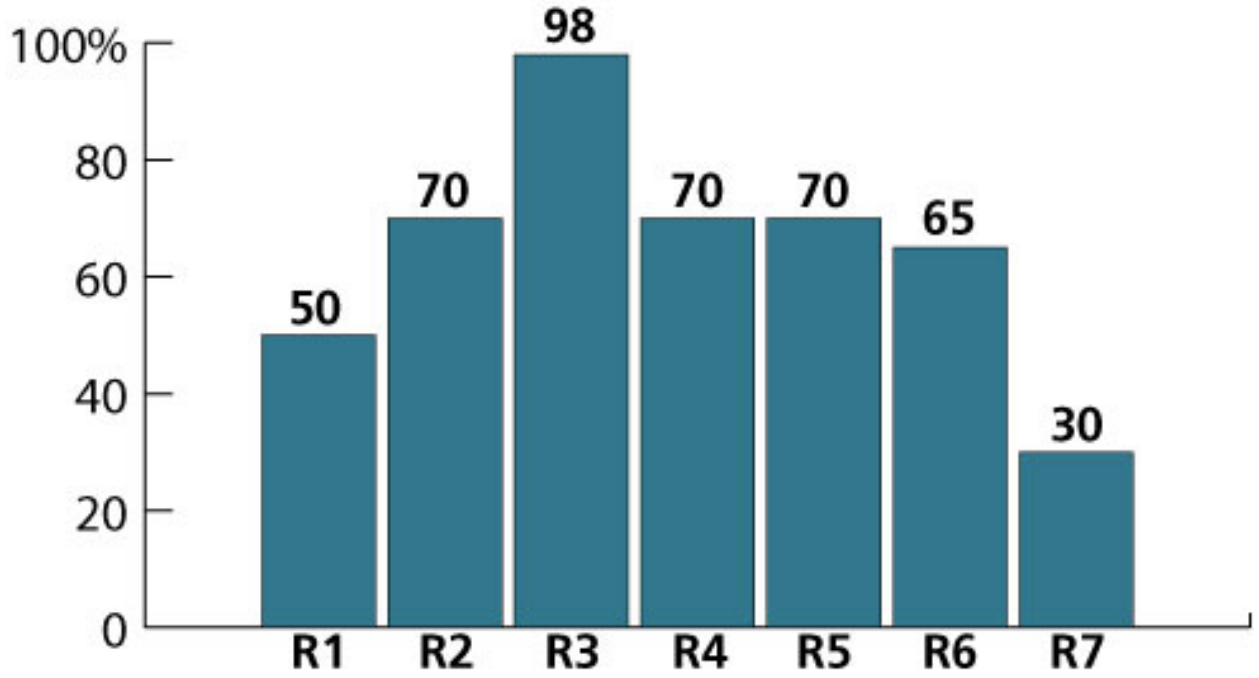
Hotels / Resorts:

Use of PBI vs. FLL

Survey Question 3: What percentage of your air travel guests use PBI vs. FLL?

Survey respondents reported that the guests at their hotels/resorts use PBI over FLL an average of 64.7% of the time. One respondent said he believes his guests use both airports equally, and one reported that his guests use PBI 98% of the time.

Sample Size: 7



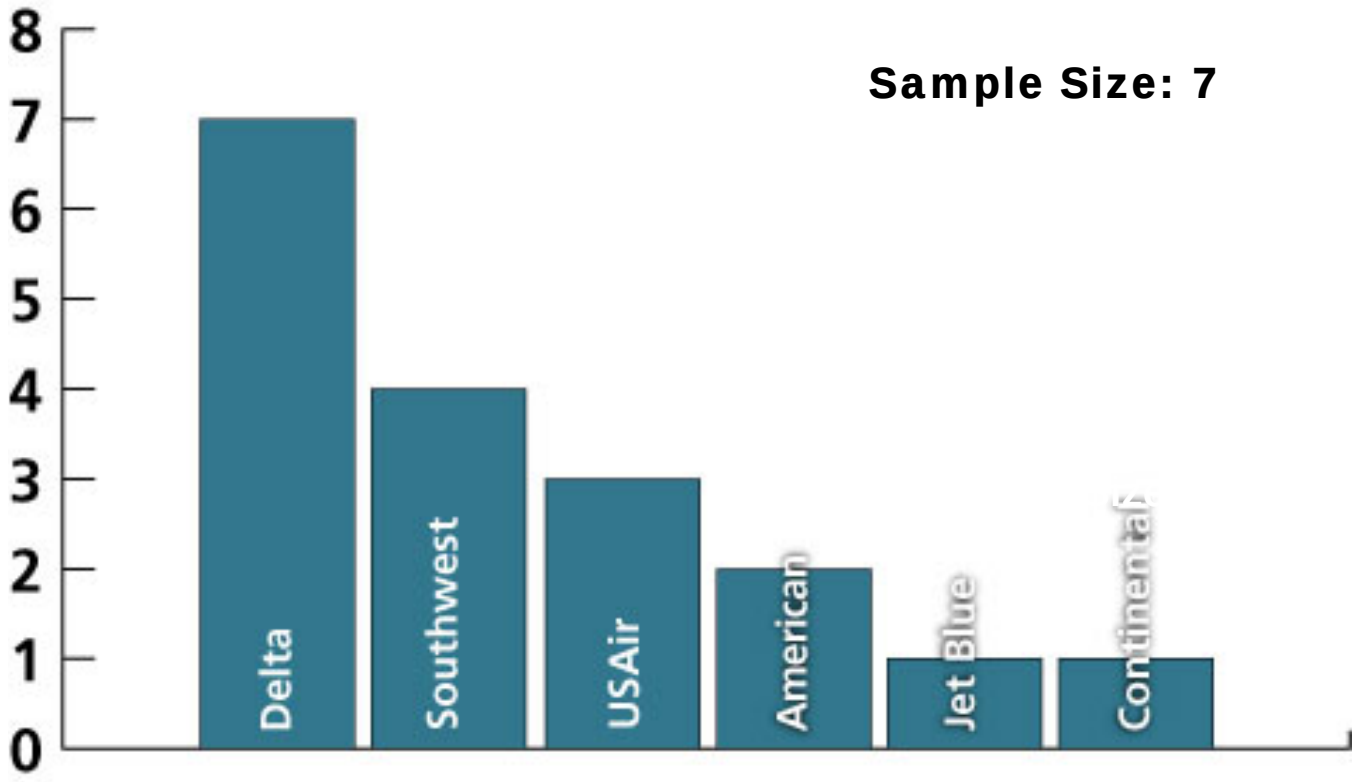
PERCENTAGE OF AIR TRAVEL PBI VS. FLL

Hotels / Resorts:

Top Domestic Airlines

Survey Question 4: Which airlines are your domestic guests using?

The survey found that Delta is the top airline among domestic travelers flying out of PBI. All seven survey respondents said their guests use Delta. Other top airlines include Southwest (4), USAir (3), American (2), Continental (1) and JetBlue (1).



Top Domestic Airlines

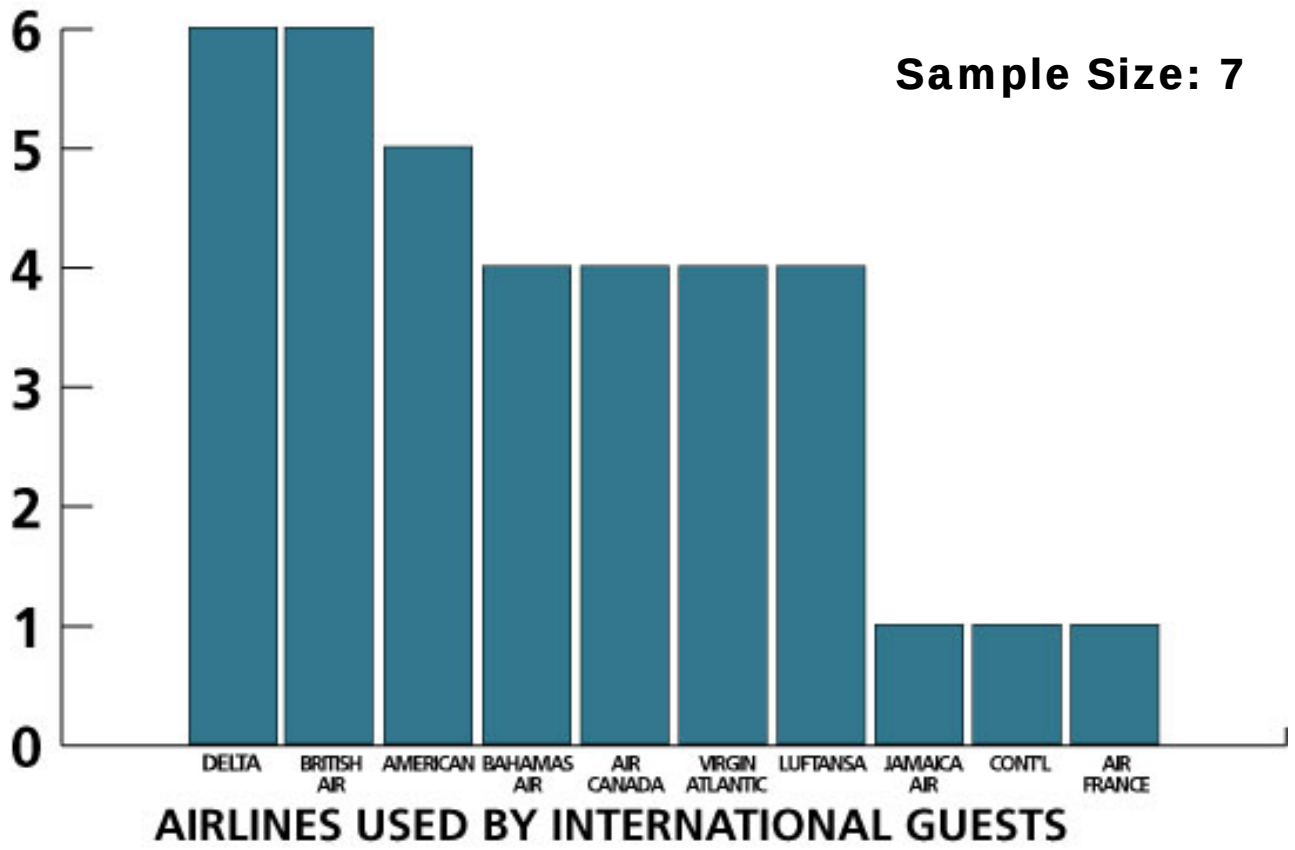
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

Top International Airlines

Survey Question 5: What airlines are your international guests using?

Delta and British Air are the primary carriers among international guests, the respondents reported. Of the seven respondents, six identified each of those airlines as being used by their international guests. American Airlines was cited by five respondents. Other tops airlines include Bahamas Air (4), Air Canada (4), Virgin Atlantic (4), and Luftansa (4). Jamaica Air, Continental and Air France each was listed by one respondent as being a top carrier for international guests.



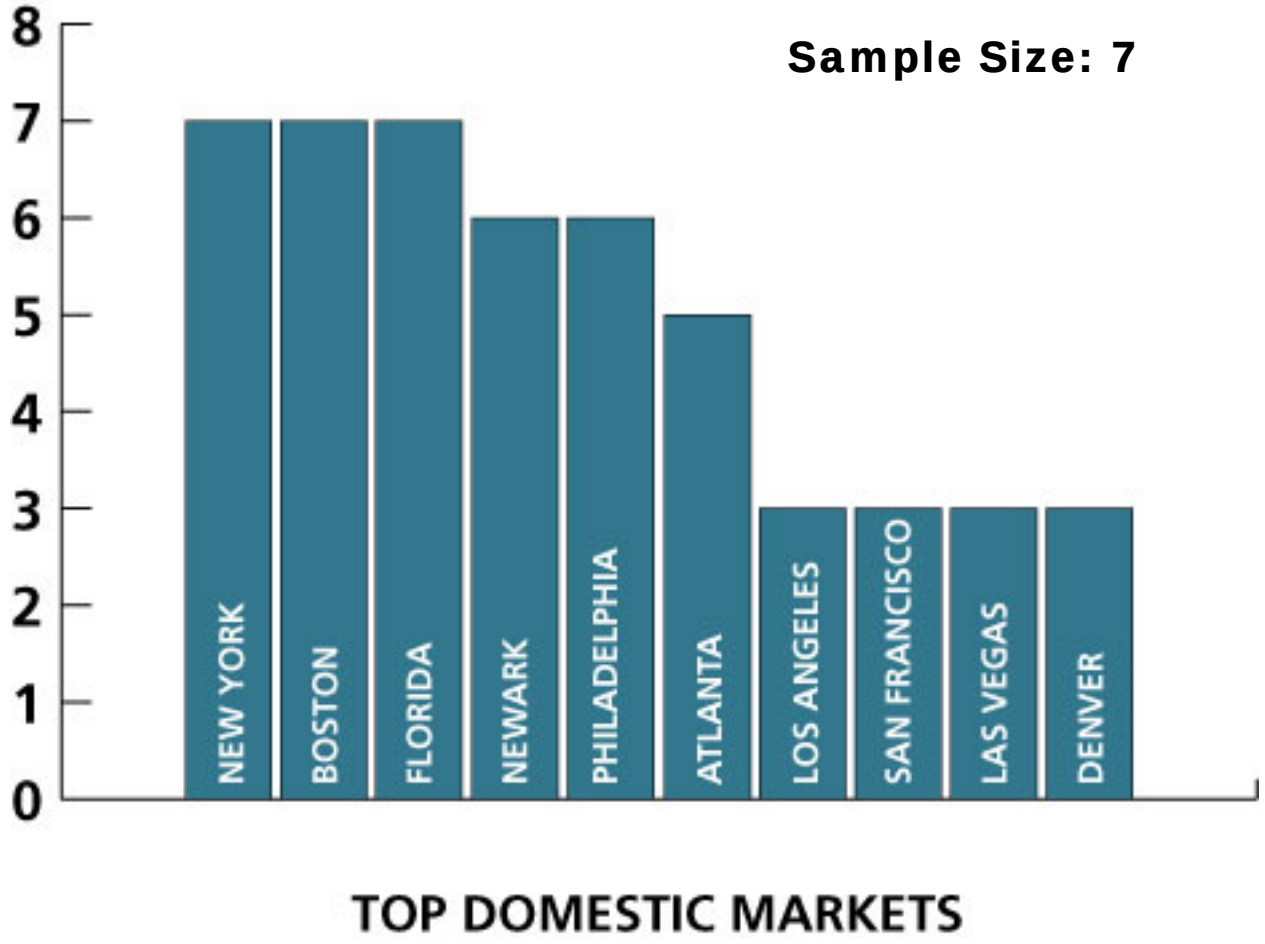
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

Top Domestic Markets

Survey Question 6: What are the top domestic markets (origin of your domestic air travel guests)?

New York, Boston and other Florida cities are the top domestic markets for travel out of PBI, the survey hotel/resort survey found. All seven respondents reported those three as the top markets for guests staying at their properties. Newark and Philadelphia each were listed by six respondents. Other top domestic markets include Atlanta (5), Los Angeles (3), San Francisco (3), Las Vegas (3), and Denver (3).



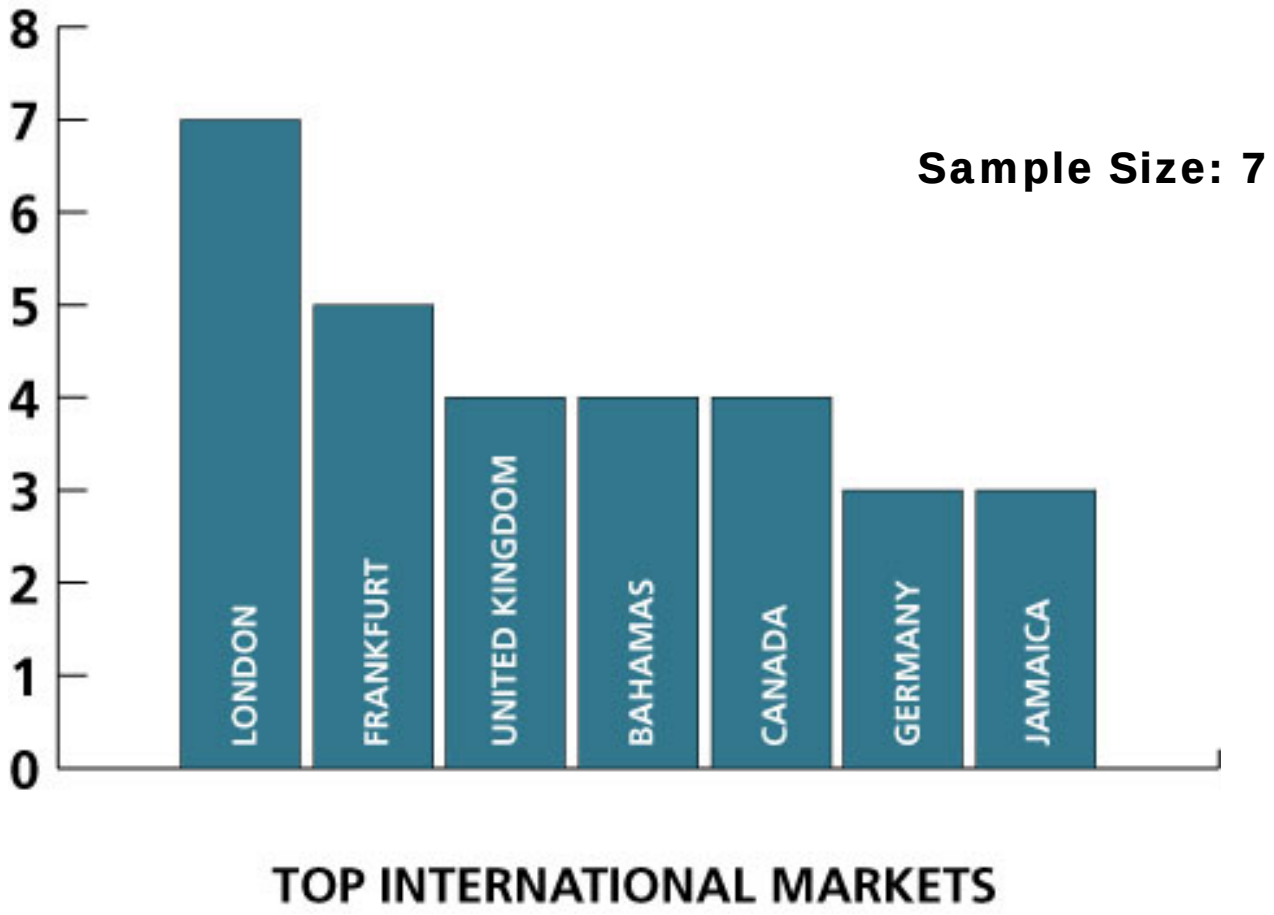
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

Top International Markets

Survey Question 7: What are your top international markets (origins of your international air travel guests)?

Survey respondents said that London, Frankfurt, Canada, the Bahamas, and the United Kingdom are the top international markets among guests staying at their hotels/resorts. All seven respondents identified London as a top market. Frankfurt was listed by 5, and the United Kingdom, Canada, and the Bahamas were listed by 4. Other international markets identified were Germany (3) and Jamaica (3).



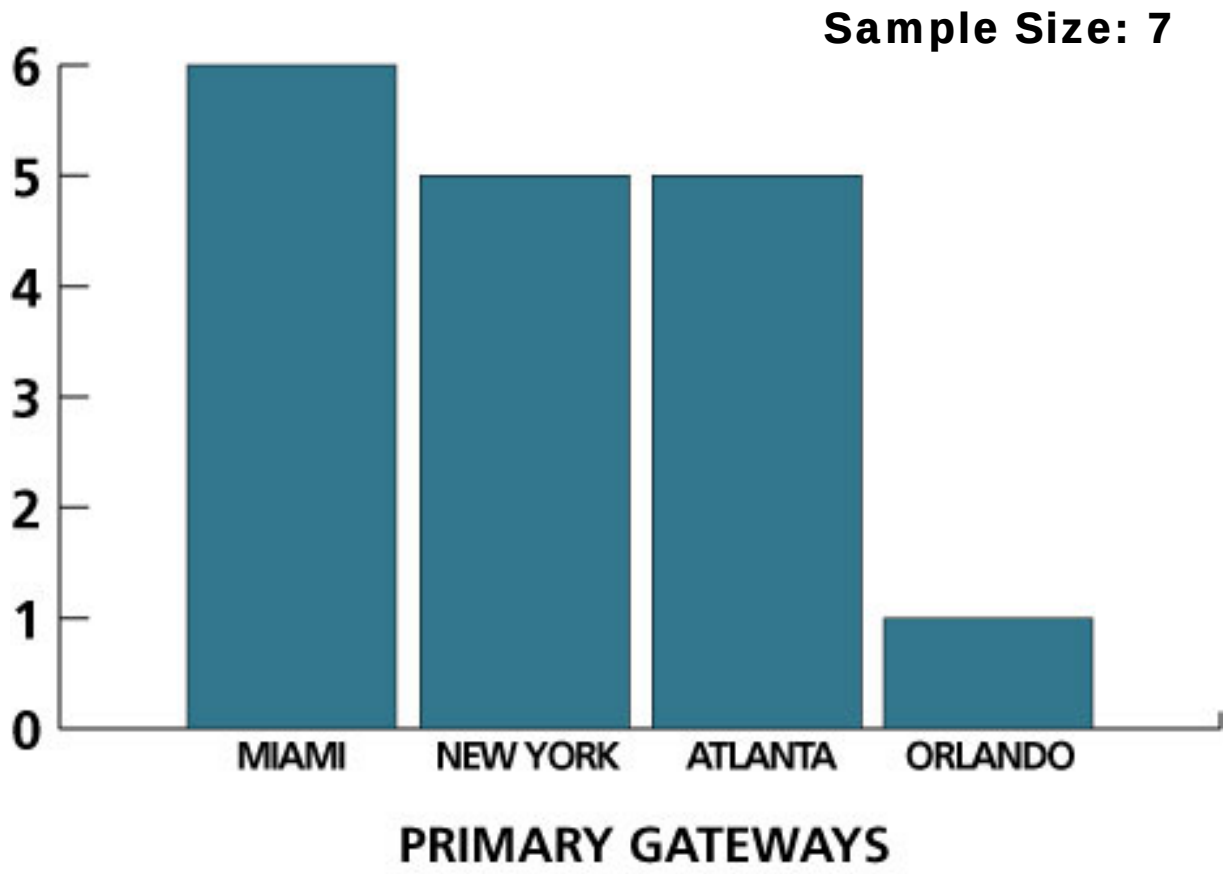
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

International Gateways

Survey Question 8: What gateway cities are your international air travel guests using?

Travelers flying between South Florida and international destinations use Miami, New York, and Atlanta as their primary gateways. Six respondents identified Miami as the primary gateway, five identified New York and Atlanta, and one identified Orlando as a gateway location.



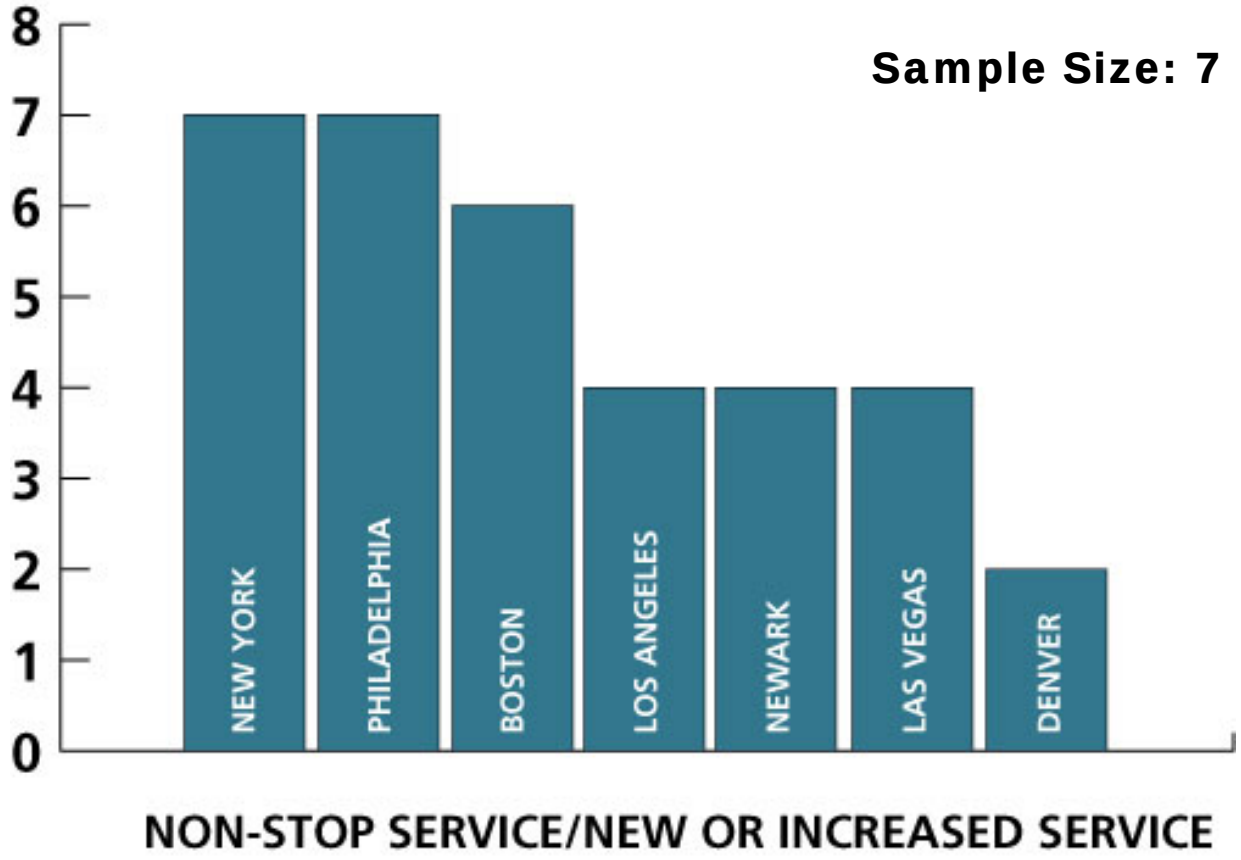
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

PBI Non-stop Service

Survey Question 9: Please comment on existing non-stop service out of PBI. Is it adequate to fit the needs? What changes, additional destinations or increased frequencies would be economically viable and better serve the needs of travelers in the Palm Beach County area?

Respondents identified New York, Philadelphia and Boston as the domestic destinations to which they believed new or increased nonstop service from PBI is most needed and economically viable. All 7 respondents identified both of those locations. Six respondents also listed Boston, while Los Angeles and Las Vegas each were listed by four respondents. Two respondents identified Denver as a destination needing increased service from PBI.



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

Seasonal Effects

Survey Question 10: Do you see a seasonal variation in the tourism market in Palm Beach County? If so, please discuss.

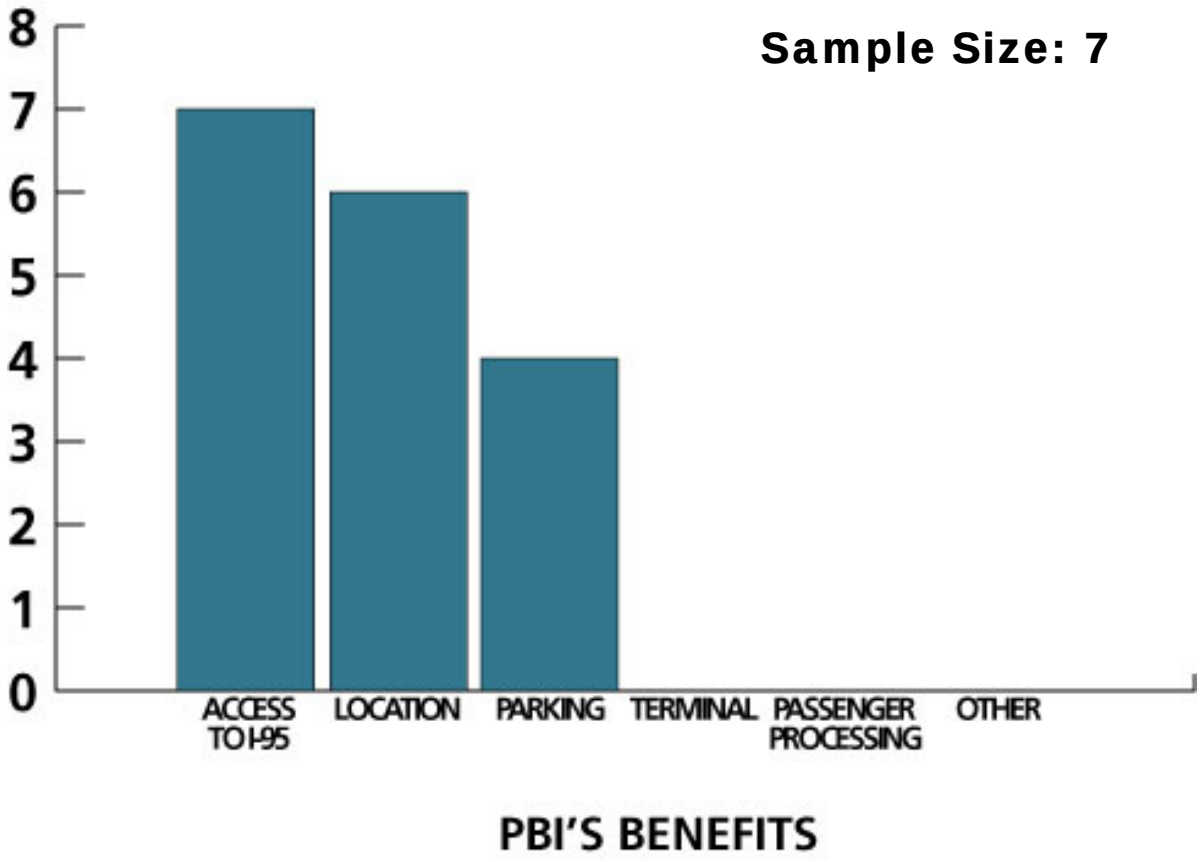
All seven survey respondents said they see a marked increase in travel from the North-east during the peak season (October through April). And five of the respondents said the summer room rates are lower, another indication of the seasonality of travel in the South Florida area.

Hotels / Resorts:

PBI's Benefits

Survey Question 11: What attributes of PBI do you like? A. Location B. Easy access C. Parking D. Terminal E. Passenger processing F. Other

All seven respondents identified PBI's easy access to I-95 as a key benefit to the airport. Six respondents said the airport's location is a key benefit, and four pointed to the airport's parking facilities as a plus for the airport's customers. One respondent commented that parking is good at PBI, except during the busy holiday travel season, and one respondent said that picking people up at PBI is difficult.



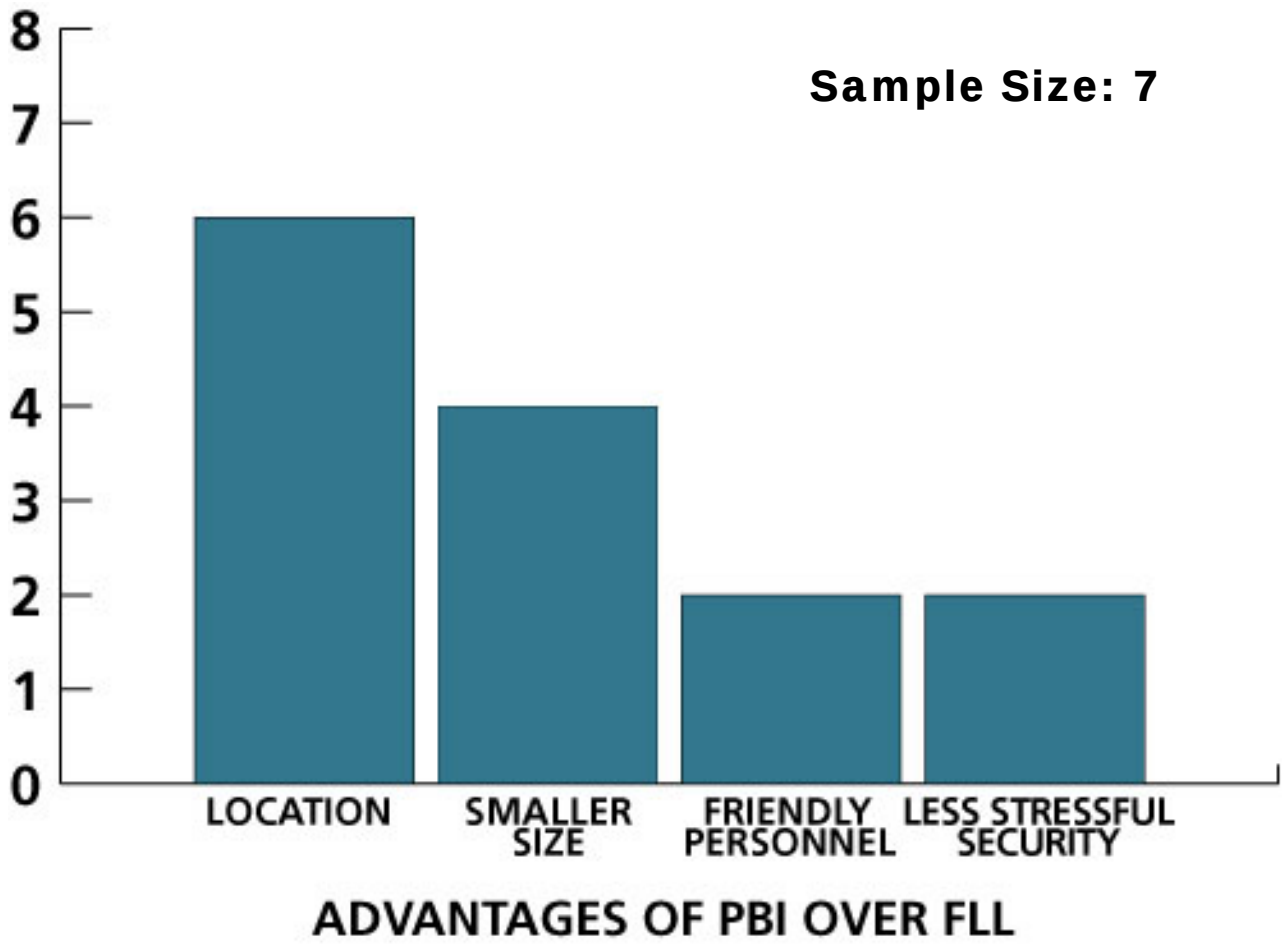
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

Advantages of PBI Over FLL

Survey Question 12: What advantages does PBI have for your guests over FLL?

Six of the seven survey respondents said that PBI's location is a key advantage over FLL. Four respondents identified PBI's smaller size, and two identified PBI's personnel and security staff as benefits. The respondents noted that PBI's staff is known for being friendly, and that the security screening process at PBI is perceived as being less stressful than at larger airports.



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

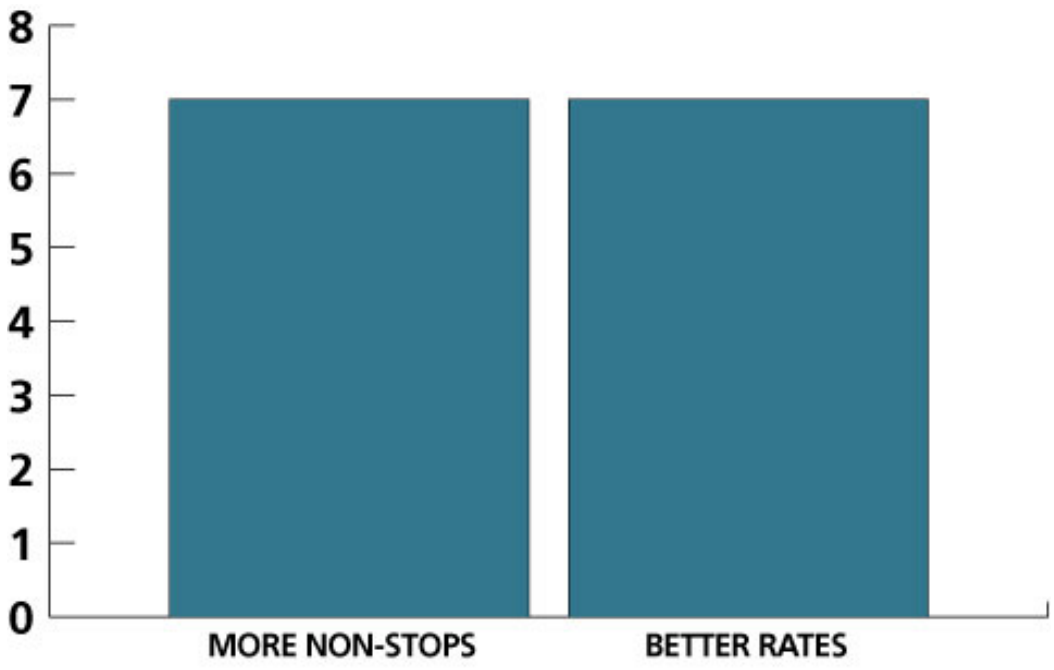
Hotels / Resorts:

Advantages of FLL Over PBI

Survey Question 13: What advantages does FLL have for your guests over PBI?

All seven respondents said FLL holds an advantage over PBI in that it offers more non-stop flights and lower fares than PBI. Three respondents commented they don't like using FLL and hope PBI can increase its non-stop service, especially for business travelers. One respondent said he believed that leisure travelers were more willing to take connecting flights, but that for business travelers “time is money.”

Sample Size: 7



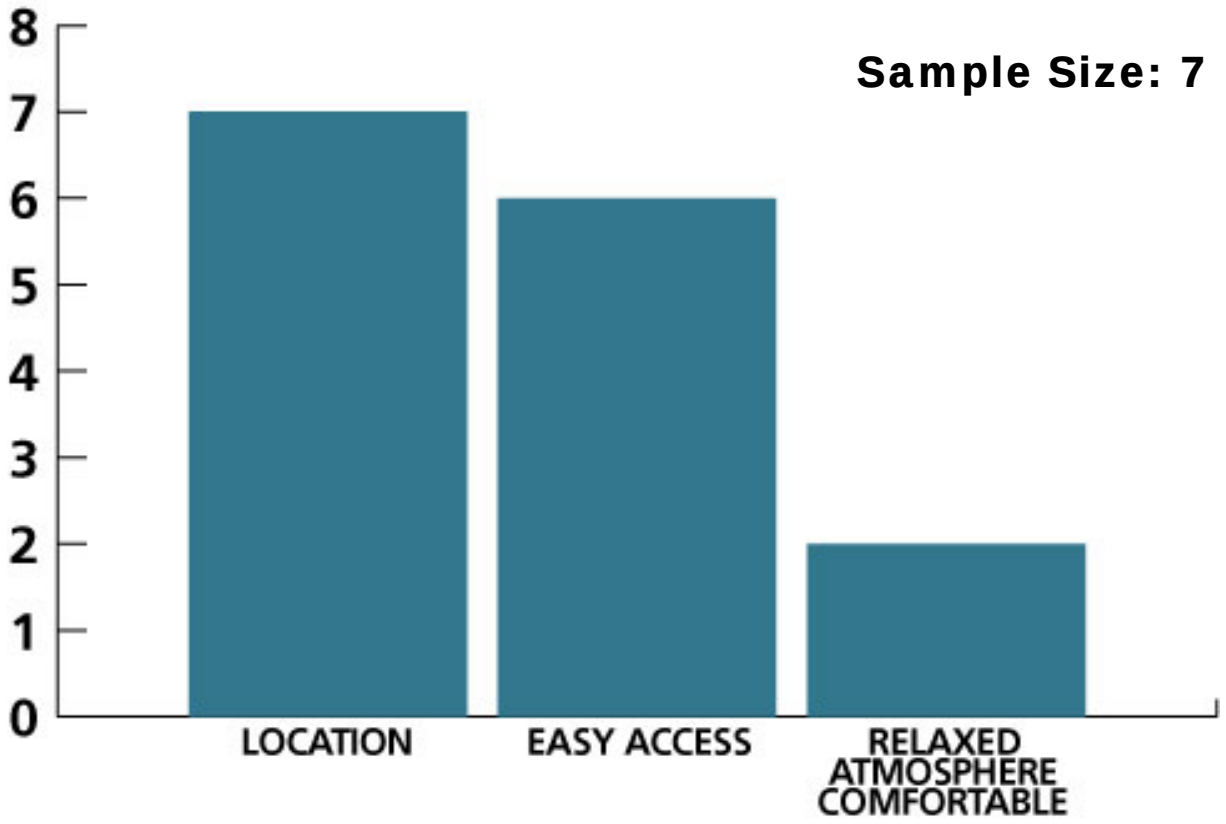
ADVANTAGES OF FLL OVER PBI

Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Advantages of PBI Over MIA

Survey Question 14: What advantages does PBI have for your guests over MIA?

All seven respondents said PBI's location is its primary advantage over MIA. Six said PBI's easy access to the interstate is a key advantage, and two listed PBI's relaxed atmosphere.



ADVANTAGES OF PBI OVER MIA

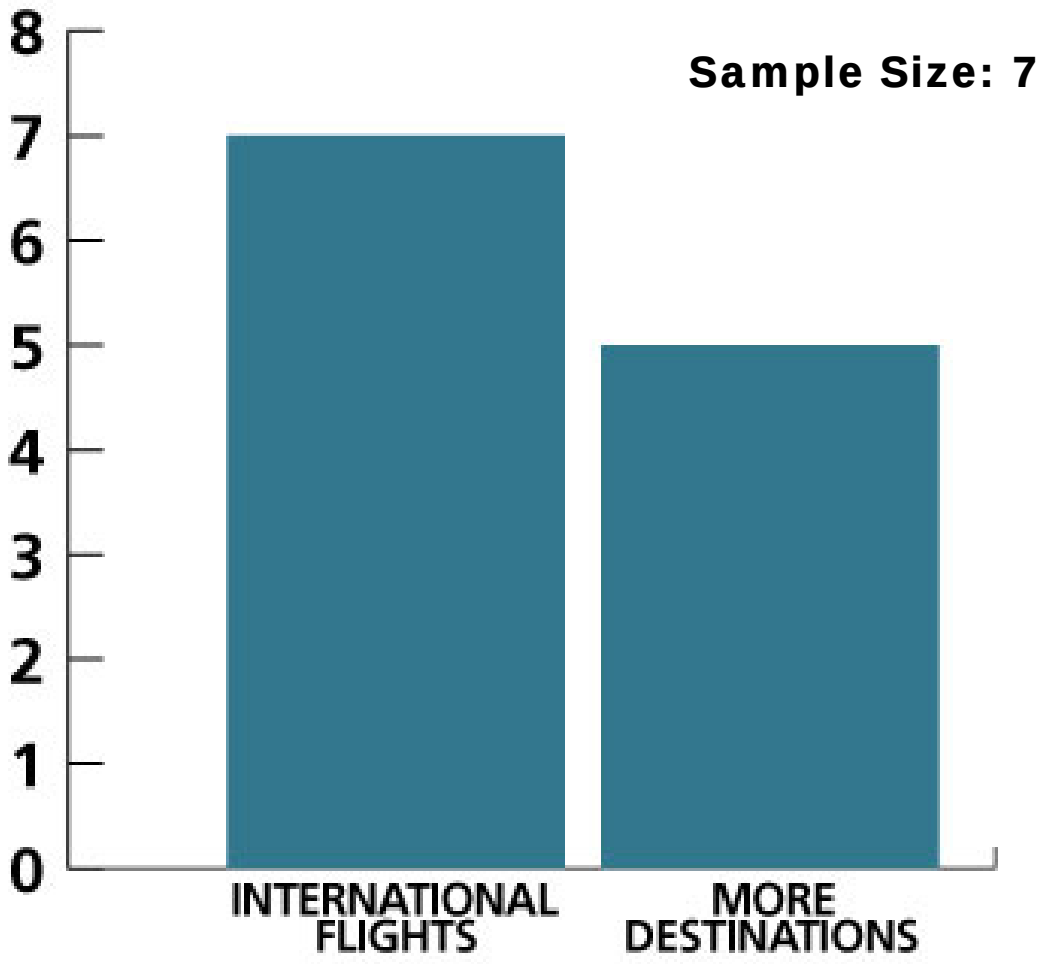
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels / Resorts:

Advantages of MIA Over PBI

Survey Question 15: What advantages does MIA have for your guests over PBI?

All seven respondents identified MIA's extensive international flights as its primary competitive advantage over PBI. Five respondents also identified MIA's flights to more destinations as another competitive advantage.



ADVANTAGES OF MIA OVER PBI

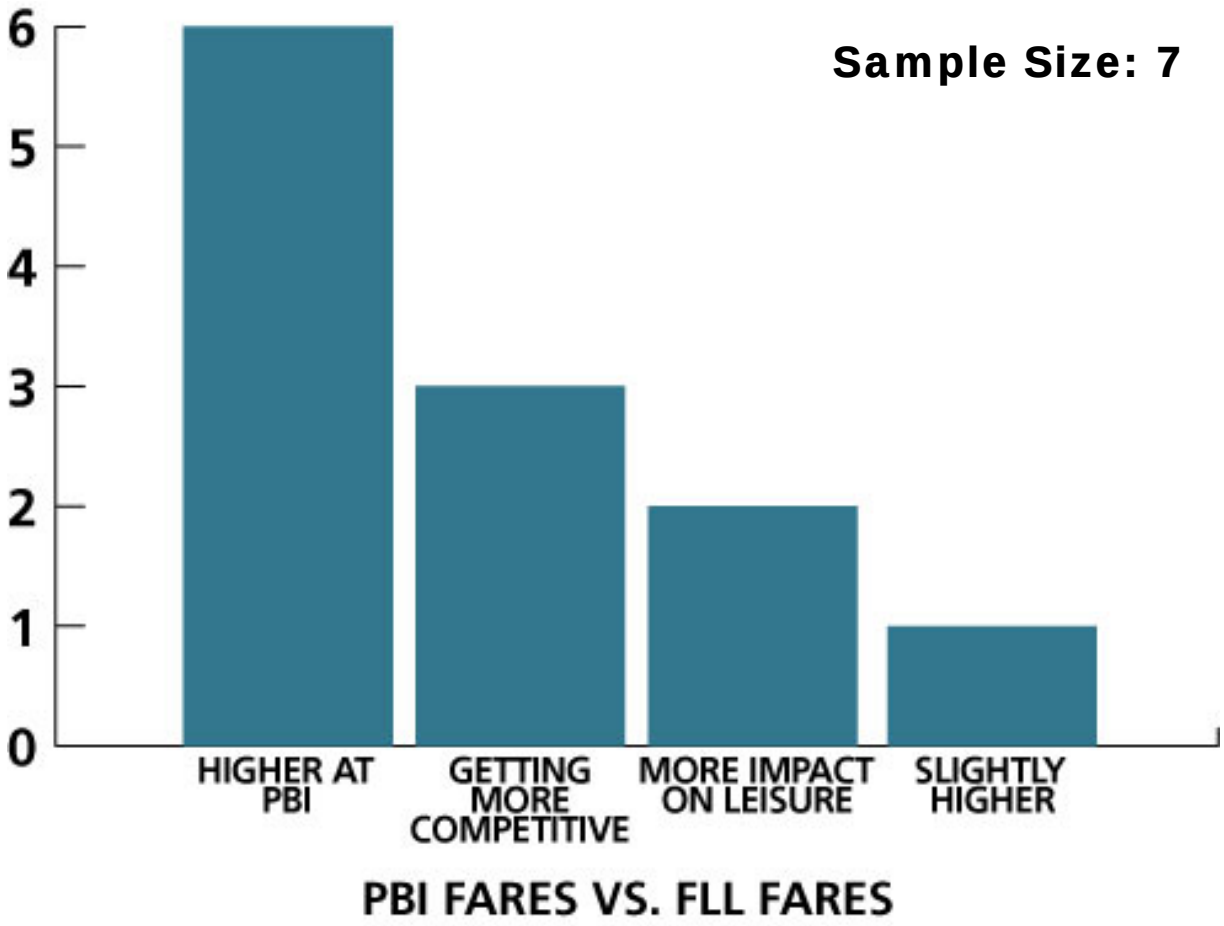
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Hotels/Resorts:

Fares: PBI vs. FLL

Survey Question 16: How do you feel fares at PBI compare with those at FLL? What impact does this have on which airport your guests travel through?

Six of the survey respondents said they perceive fares at PBI to be higher than those at FLL, and the other respondent said the fares are "slightly higher" than FLL's. Three of the respondents also noted that PBI's fares are getting more competitive, and two respondents said the difference in the fares has a greater impact on leisure travelers than on business travelers. One respondent said he sometimes books his group sales for less expensive fares out of FLL and MIA and then shuttles passengers from those airports to the hotel, which is located just two miles from PBI.



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 7.

Palm Beach International Airport
GATEWAY TO
the Best of Everything!

2005 Market Awareness Survey

SECTION II-3

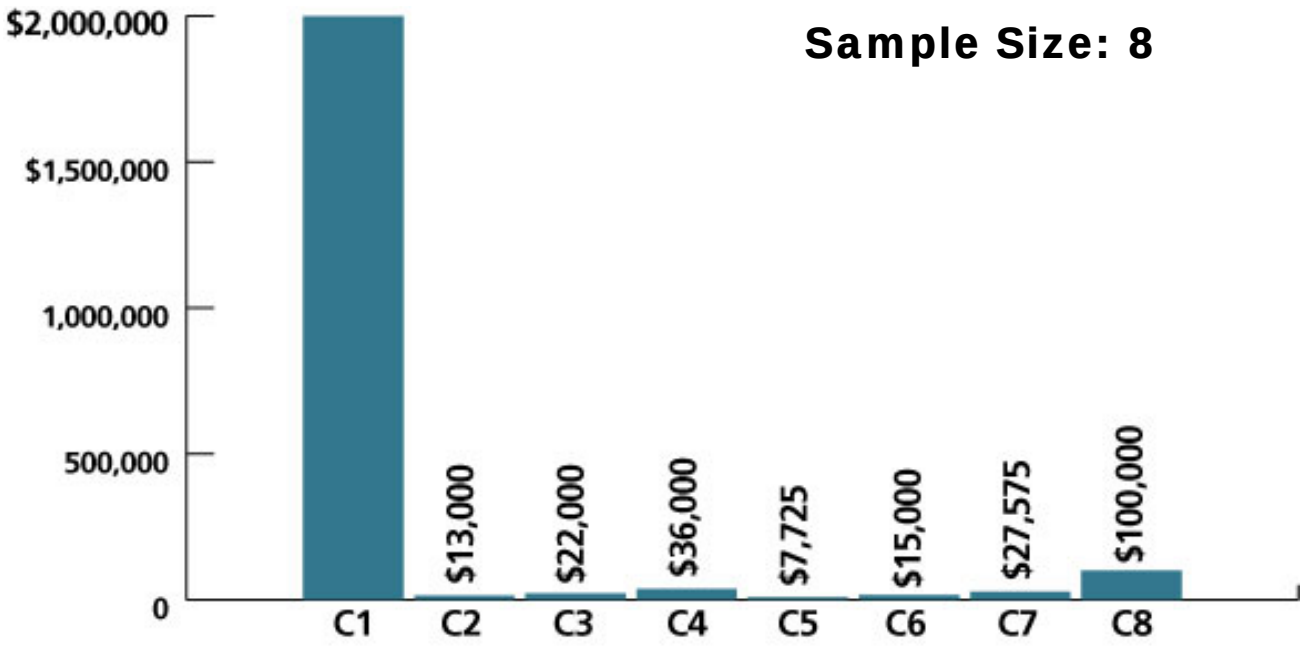
Corporations

Corporations:

Annual Travel Budget

Survey Question 1: How much money do you spend annually for corporate air travel?

The survey found that the eight respondents spend a total of $2,221,300 on air travel per year. One company alone reported spending an estimated $2 million in air travel expenses per year. The remaining seven respondents reported spending between $7,725 and $100,000 per year. Excluding the company that reported it spends $2 million per year, the average amount spent per year on corporate air travel is $31,614.



Annual Corporate Travel Budget

Corporations:

Importance of Air Travel to Business

Survey Question 2: How important is convenient and efficient air service to your operations? Critical, Important, Somewhat Important or Not Important .

The eight respondents unanimously reported that convenient and efficient air service is critical to their operations.

Sample Size: 8

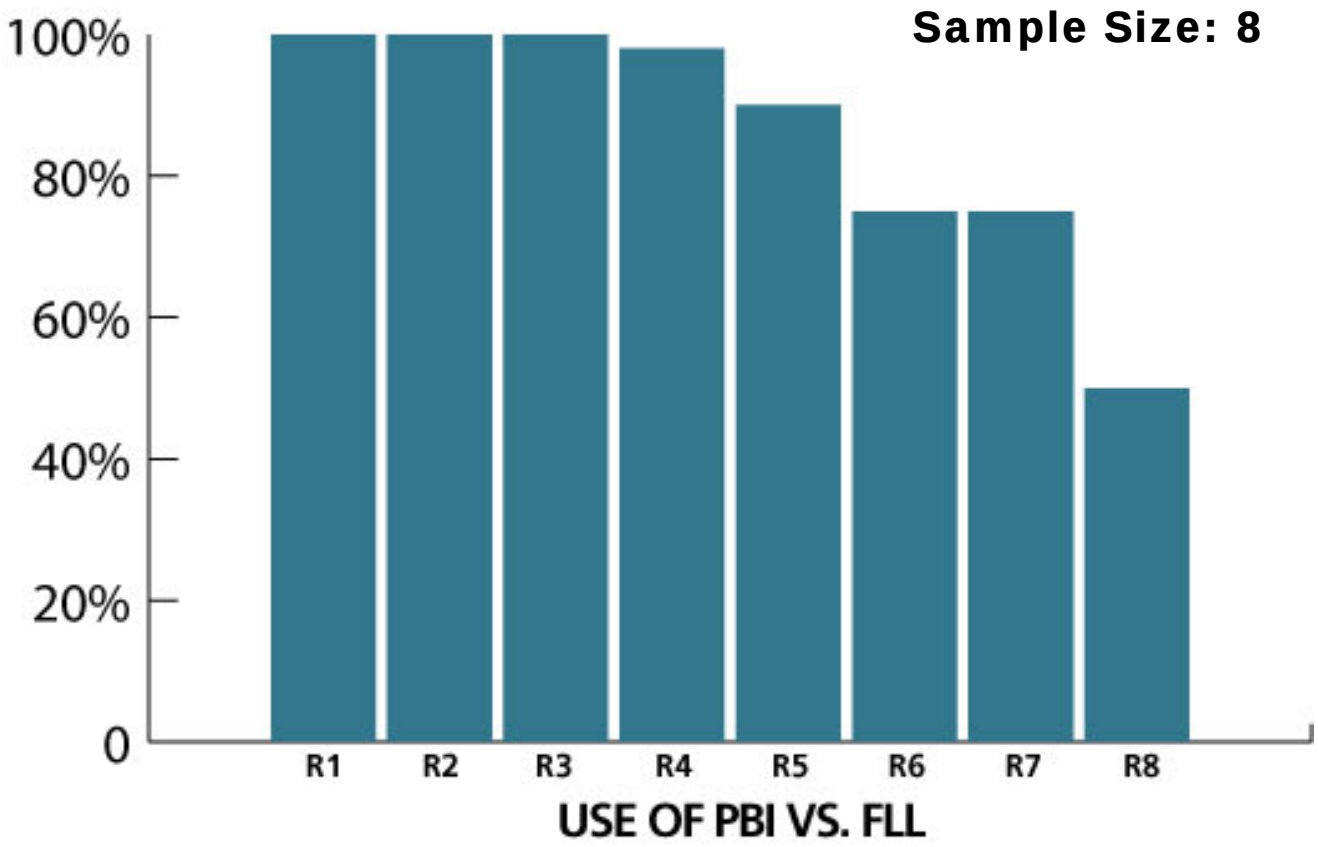
IMPORTANCE OF AIR TRAVEL TO BUSINESS

Corporations:

Use of PBI vs. FLL

Survey Question 3: What percentage of your company's corporate flights occur through PBI vs. FLL?

The survey found that 86% of corporate travel in Palm Beach, Martin, St. Lucie and Indian River counties is booked through PBI instead of FLL. Of the eight survey respondents, only one said they use PBI and FLL about equally for business travel. The remaining seven respondents reported the percentage of corporate air travel booked through PBI ranges from 75% to 100%.



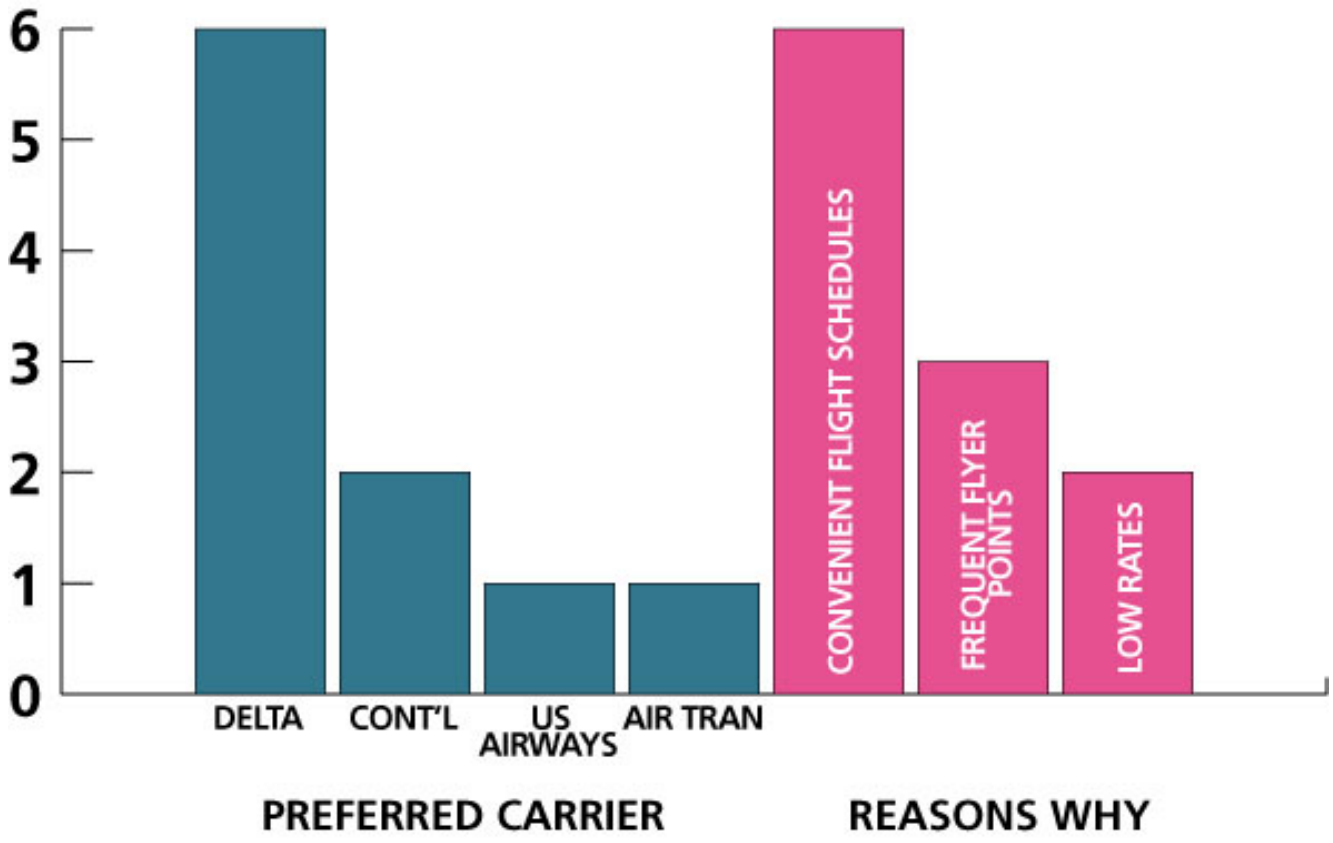
Corporations:

Top Airlines

Survey Question 4: Which airline is your primary carrier? Why?

Of the eight respondents, six named Delta Airlines as their primary air carrier. Two respondents said they use Continental Airlines frequently. US Air and Air Tran received one vote each from respondents as a primary carrier. All eight respondents said they chose their primary air carrier because of flight schedules. Four respondents said they chose their carrier because they had the benefit of frequent flyer points, and two respondents felt their primary carriers consistently had the lowest rates.

Sample Size: 8



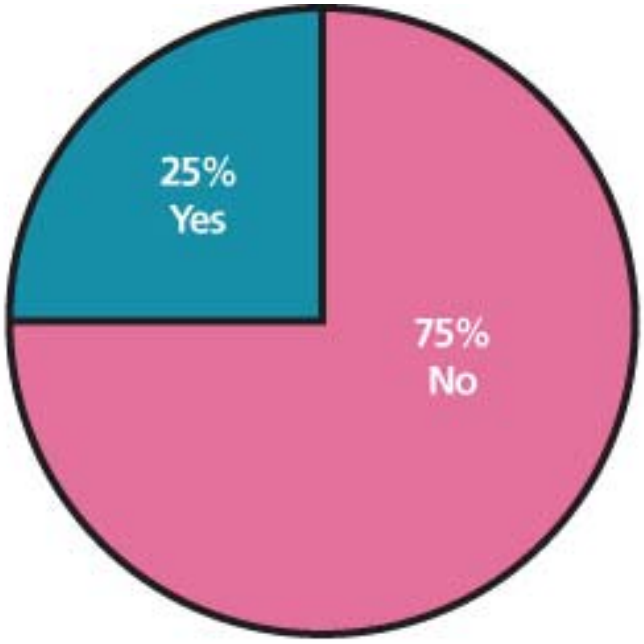
Corporations:

Preferred Provider Contracts

Survey Question 5: Do you have preferred provider contracts with that carrier?)

The survey found that only two (25%) of the respondents have preferred provider contracts with their air carrier; both of those were with Delta. Two respondents said they had preferred provider contracts in the past, but did not renew because they no longer felt they received benefit from it. Both of those respondents felt that with the many options travelers have today, they were not getting the best return from preferred provider contracts they had in the past. Respondents indicated they get better prices by shopping around.

Sample Size: 8



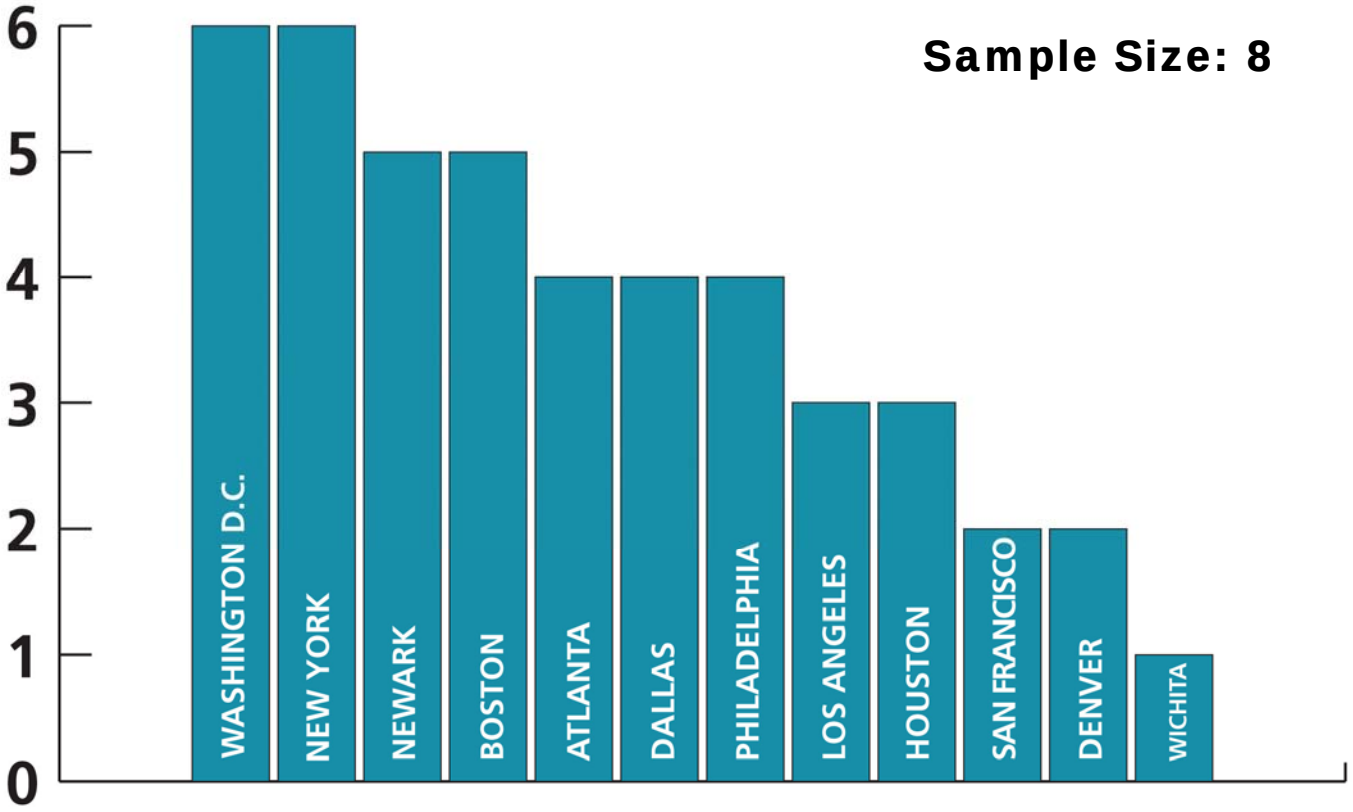
PREFERRED PROVIDER CONTRACTS

Corporations:

Top Domestic Destinations

Survey Question 6: What are your top domestic destinations for corporate air travel?

The Northeast is the top region of the country for business travelers leaving the South Florida area. Six respondents listed New York and Washington DC as their top domestic destinations for corporate air travel. Five listed Newark and Boston, four listed Atlanta, Philadelphia and Dallas, three listed Los Angeles and Houston, two listed San Francisco and Denver, and one listed Wichita.



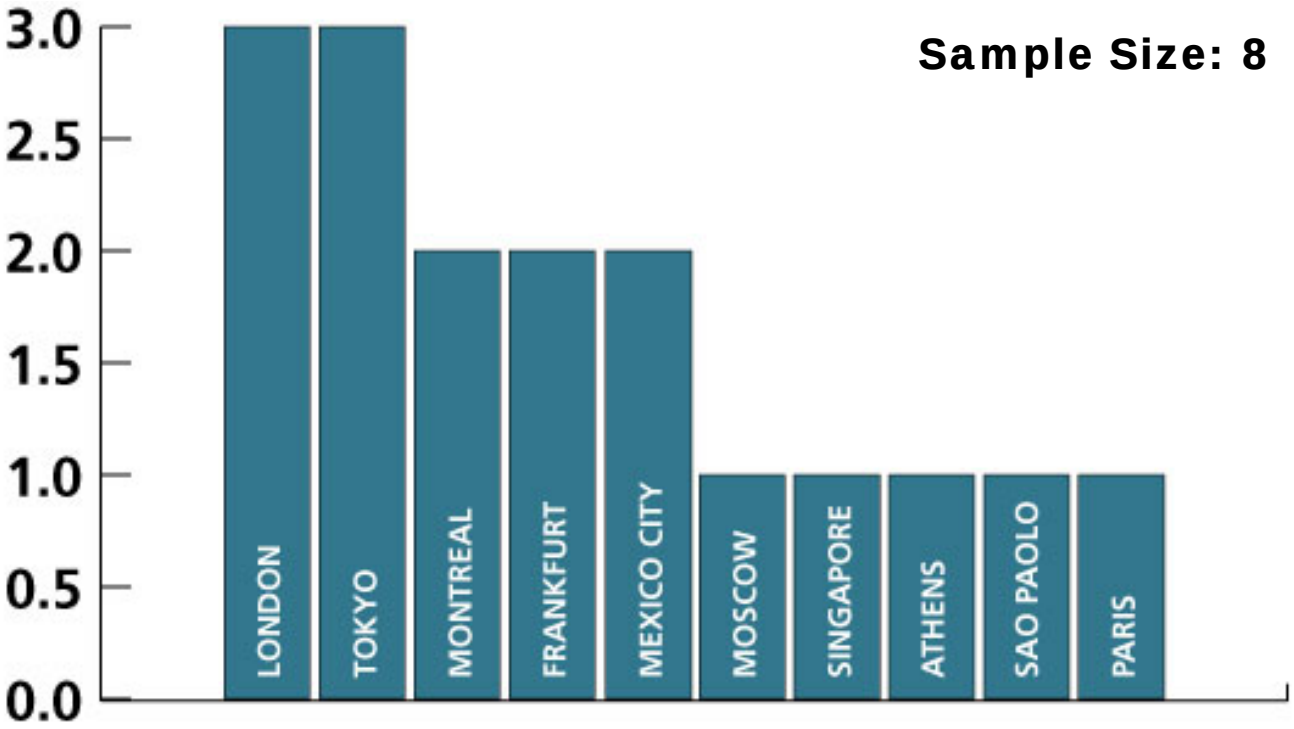
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Corporations:

Top International Destinations

Survey Question 7: What are your top international destinations for corporate travel within your company?

The top destinations for corporate international air travel for business travelers in the South Florida area are London and Tokyo, the survey found. Three respondents listed each of those cities as their primary international destinations for corporate travel. Other top cities include Montreal, Frankfurt and Mexico City, which each were listed by two respondents, as well as Moscow, Singapore, Athens, Mexico City, Sao Paolo and Paris, each of which was listed by one respondent.



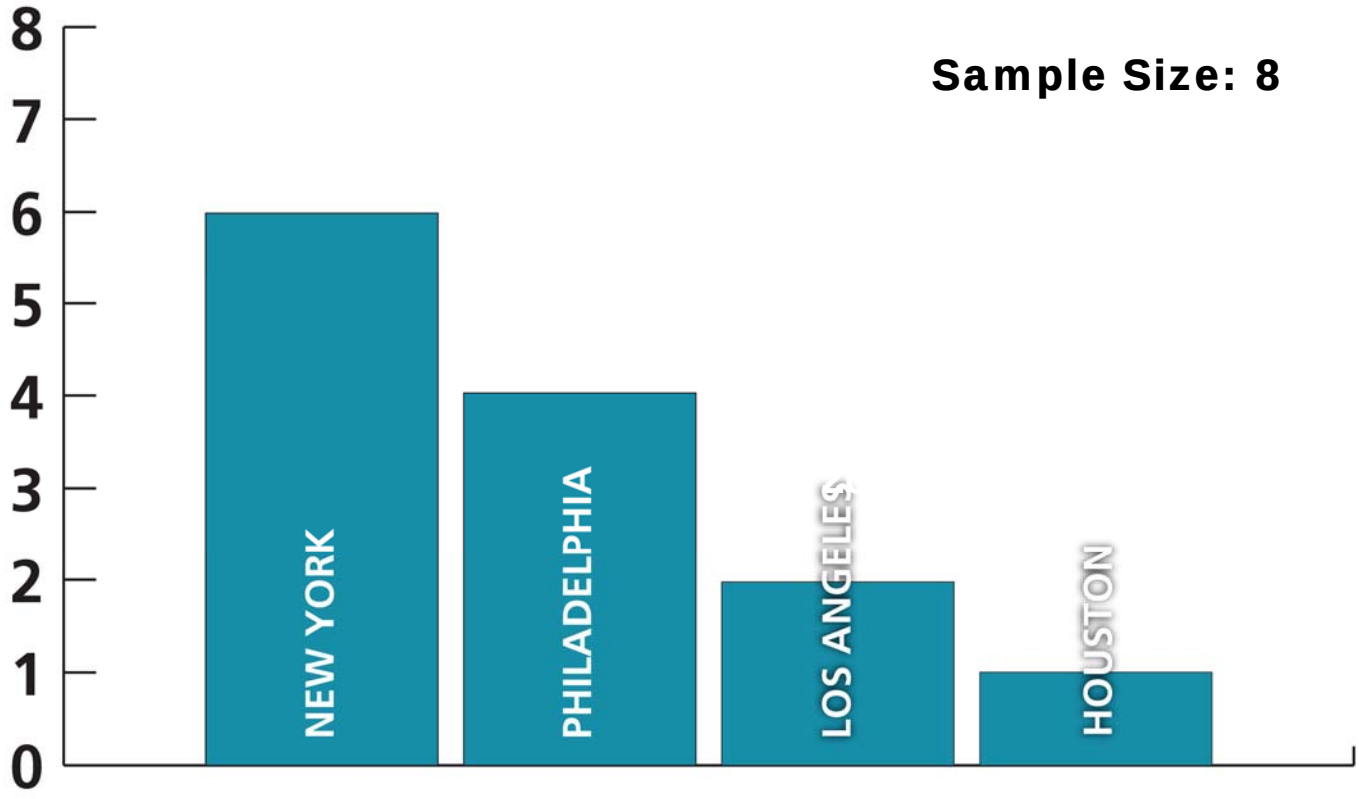
Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Corporations:

Need for Additional Domestic Destinations

Survey Question 9: Are there domestic locations you would like to see PBI add new or increased non-stop service to? Which ones?

The respondents identified New York (6), Philadelphia (4), Los Angeles (2) and Houston (1) as destinations to which they believe new or increased non-stop service from PBI would be most useful.



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

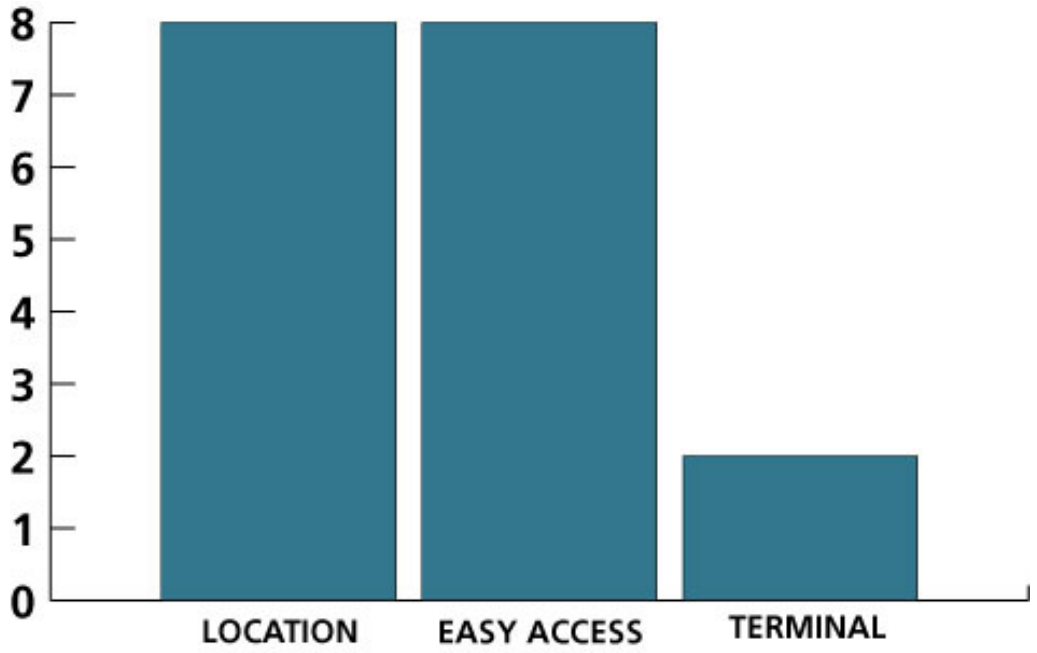
Corporations:

PBI's Benefits

Survey Question 10: What attributes of PBI do you like?

PBI's location and easy access to I-95 were listed by all eight survey respondents as being the best attributes of PBI. Two respondents also noted that the layout of the terminal was very convenient.

Sample Size: 8



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

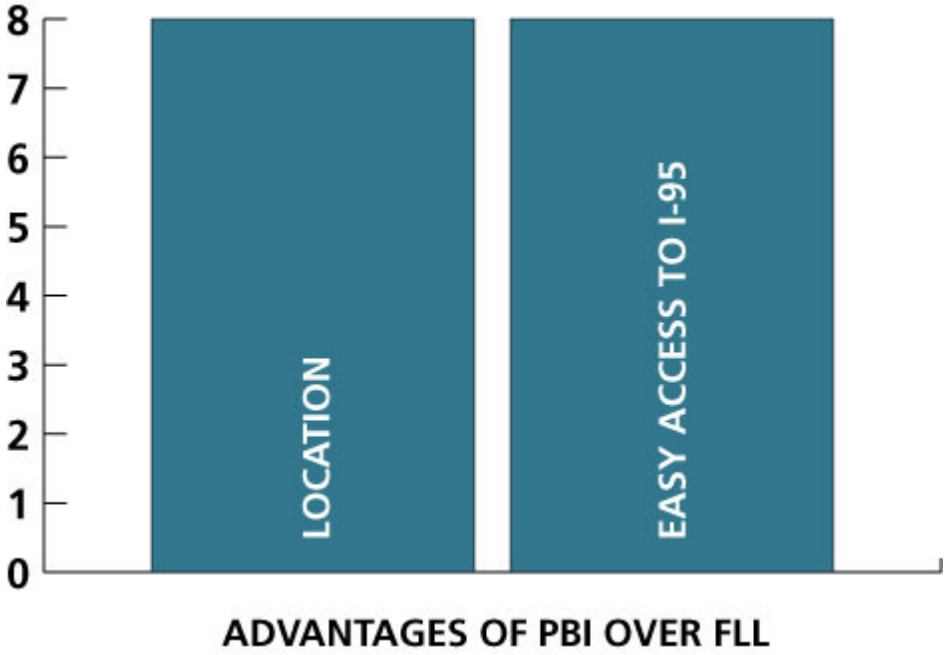
Corporations:

Advantages of PBI Over FLL

Survey Question 11: What advantages does PBI have for you over FLL?

All eight respondents said that location and easy access to I-95 were the top advantages of PBI over FLL. One respondent stated that PBI is "much more user-friendly," which is why his company uses PBI exclusively instead of FLL.

Sample Size: 8



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

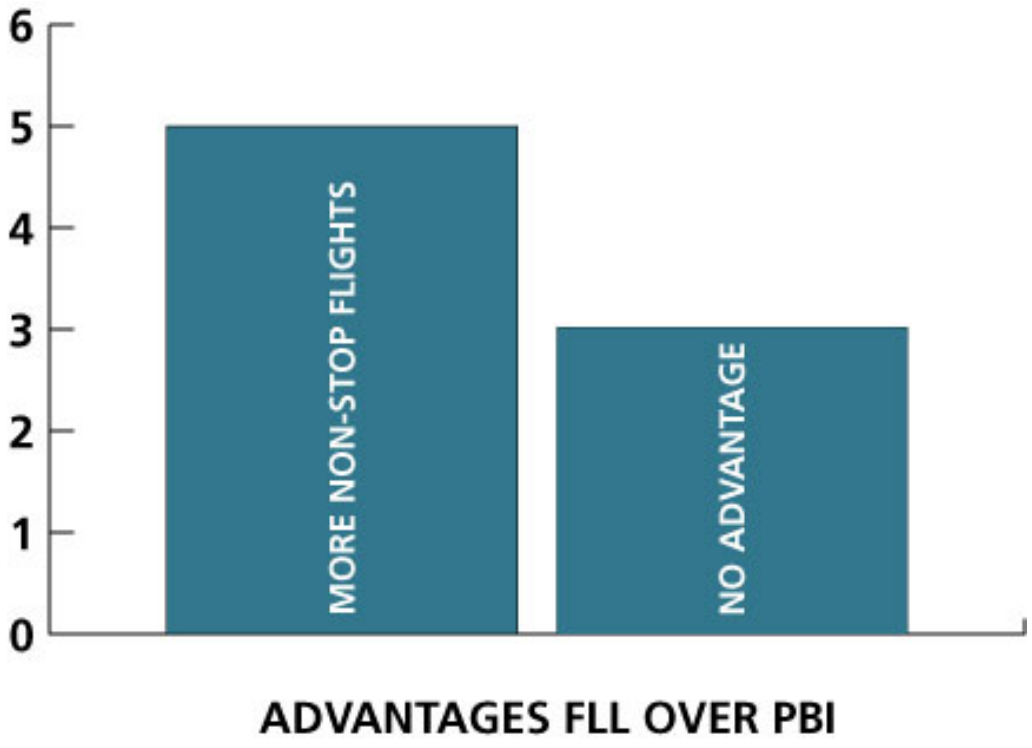
Corporations:

Advantages of FLL Over PBI

Survey Question 12: What advantages does FLL have for you over PBI?

Of the eight respondents, five (62.5%) said that FLL's ability to offer more non-stop flights to various locations is its primary competitive advantage over PBI. Two respondent companies said in spite of the fact that FLL offers more non-stop flights, it is more difficult to get in and out of than PBI. One respondent said they typically experience more delays at FLL than PBI, and three respondents said FLL holds no advantage over PBI.

Sample Size: 8



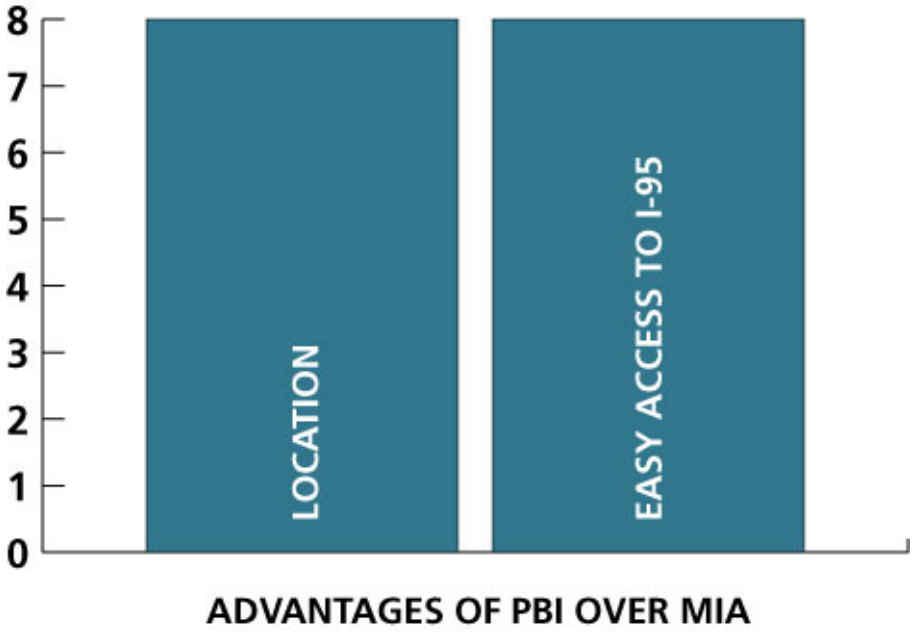
Corporations:

Advantages of PBI Over MIA

Survey Question 13: What advantages does PBI have for you over MIA?

All eight respondents cited location and easy access to I-95 as top advantages of PBI over MIA. Two respondents said that they try to avoid MIA unless there are no other flight schedules to fit their needs.

Sample Size: 8



Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

Corporations: Advantages of MIA Over PBI

Survey Question 14: What advantages does MIA have for you over PBI?

Of the eight respondents, six (75%) said they believe MIA offers more flights than PBI. Six respondents also specifically cited international flight options as an advantage of MIA over PBI.

Sample Size: 8

Note: Respondents could list multiple responses; therefore the number of responses totals more than the sample size of 8.

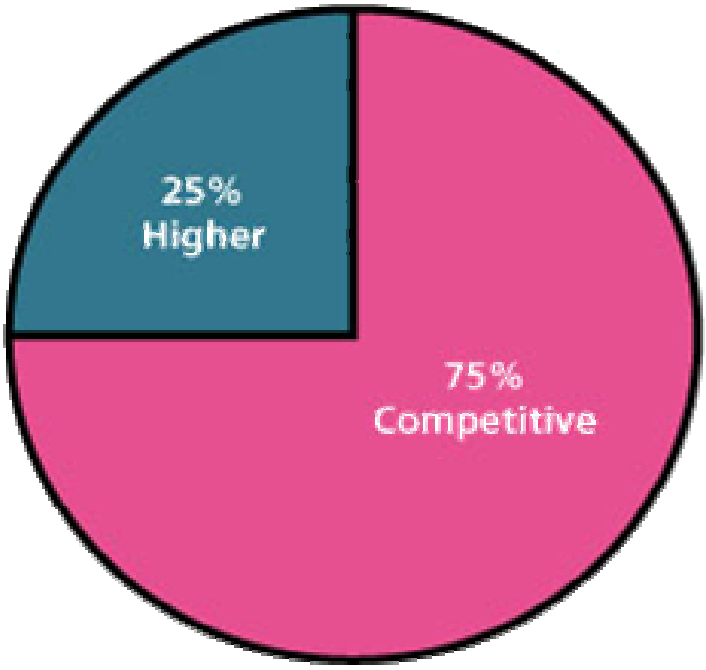
Corporations:

PBI Fares vs. FLL

Survey Question 15: How do you feel fares at PBI compare with those at FLL? What impact does this have on which airport you travel through?

Of the eight survey respondents, six (75%) said fares at PBI are competitive with those at FLL. Two respondents said fares at PBI are higher. All respondents said flight schedules were the most important factor for business when making a reservation, and fares make little or no difference. Two respondents noted that when fares were higher at FLL it was not enough to make a difference to the time saved by flying out of PBI.

Sample Size: 8



PBI FARES VS. FLL

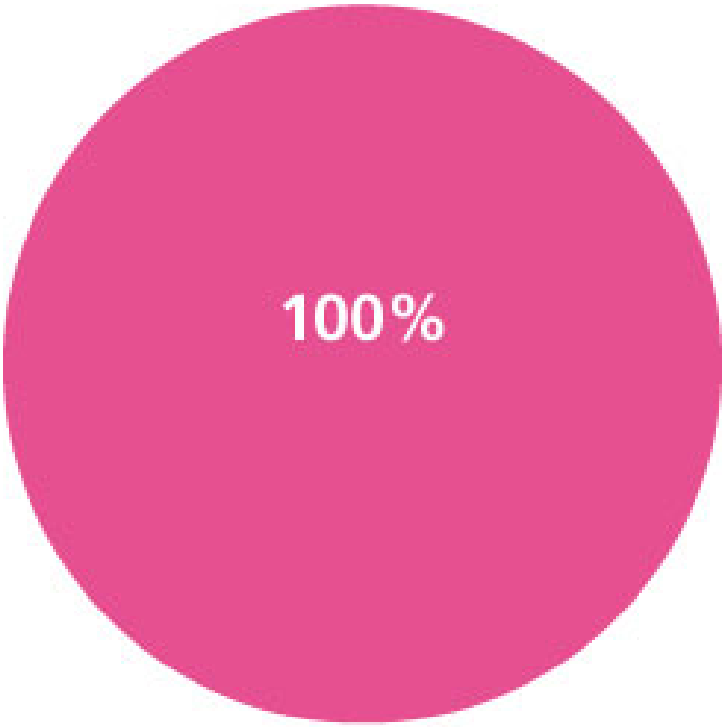
Corporations:

Use of PBI Web Site

Survey Question 16: Have you used the "Flight Schedules" feature on PBI's Web site? If so, do you find it useful? What improvements might make it more useful?

All eight survey respondents said they use the flight schedule feature on PBI's Web site extensively. Two of the respondents said that although they use the Web to check flight schedules, they do not believe the information is always up-to-date, particularly when delays or changes are made by the airlines. One respondent stated that even if a traveler checked the airport's Web site flight schedule before they left for their flight, the departing time could change again before they arrive at the airport. None of the respondents offered any specific suggestions for improvement.

Sample Size: 8



USE OF PBI WEB SITE

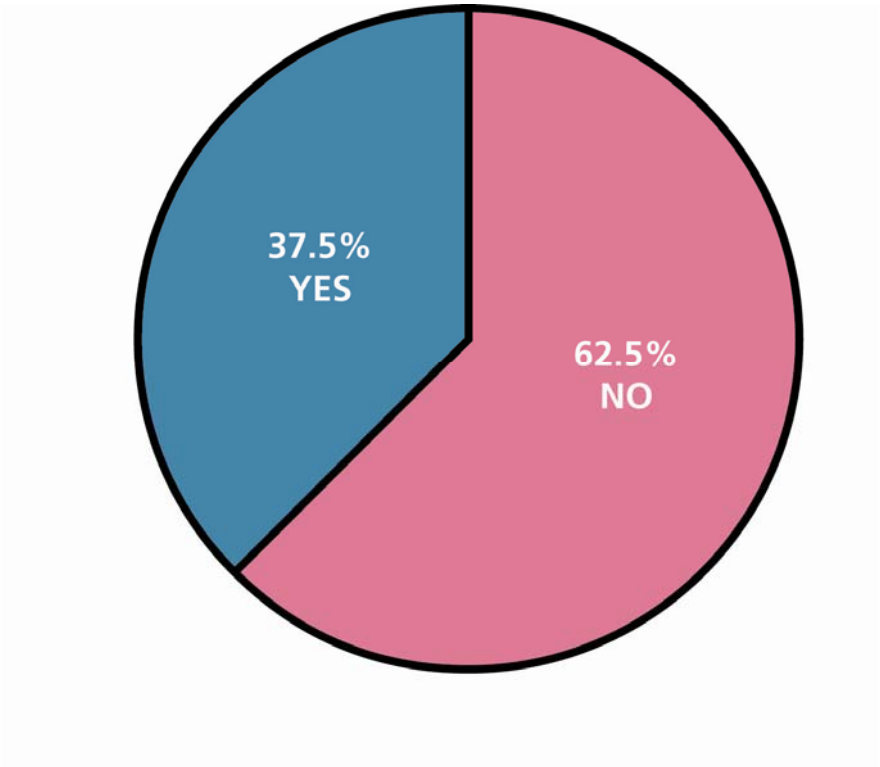
Corporations:

Use of NetJets

Survey Question 17: Are you using NetJets? Are those flights being made through PBI? How many, on average, do you use per month?

Three (37.5%) of the eight respondents stated they have used NetJets and five (62.5%) have not. Of the five who said they have not used it, four stated they had never heard of it. Two of respondents who said they have used it have done so only once. One respondent stated he uses it about three times per year.

Sample Size: 8



Use of NetJets

Corporations:

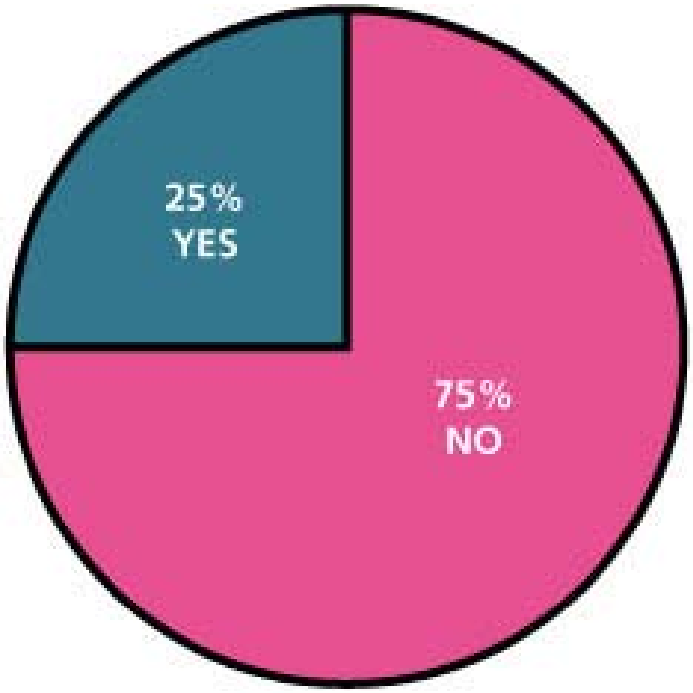
Use of Corporate Jets

Survey Question 18: Does your company utilize private (corporate) jets? What General Aviation facility do you use for those flights? How many of these private, corporate jet flights does your company use per month, on average?

An indication of how the 9/11 terrorist attacks have affected the aviation industry, the survey found indications that companies that used to book corporate jets for company travel may not be doing so as often anymore. One respondent said that after the terrorist attacks, they implemented new company guidelines governing how many of their top executives could fly together. Where they used to book corporate jets for the executives to fly together, they no longer do so because of the new policies. Therefore, their usage of corporate jets is reduced.

Two of the eight respondents (25%) said they still use corporate jets for at least some of their air travel. Those two respondents said their companies fly from PBI when they take corporate jets, and that they use those jets only a few times per year. The rest of their air travel is via commercial airlines. None of the businesses surveyed own their own plane or jet.

Sample Size: 8



Use of Corporate Jets

Palm Beach International Airport
GATEWAY TO
the Best of Everything!

2005 Market Awareness Survey

SECTION III

Survey Comments

Survey Comments

Several survey respondents offered suggestions or comments regarding PBI's future growth and outreach with the business community. These comments are listed below:

"Take opportunities to tie into some major events and activities going on in the Palm Beach area. Promotions with major league sports, cultural events or special business expos. These opportunities they believed would build an even stronger tie to the community."

"Have periodic gatherings to touch base with area businesses to help identify trends and opportunities for economic development. This will enable PBI to increase its business and help the surrounding communities."

"Continue the communications in the form of small focus groups to keep informed of what is going on at the airport."

"If the airport expands its facilities, it should strongly consider enhancing corporate services."

"With the addition of Scripps to the Palm Beach business community, the airport should in the near future add non-stop flights to San Diego."

Palm Beach International Airport
GATEWAY TO
the Best of Everything!

2005 Market Awareness Survey

SECTION IV

Appendix: Raw Data

Travel Agencies

Q1: Gross annual sales revenues
Palm Beach--$13-million
Palm Beach--$2-million
Palm Beach--$750,000
Palm Beach--$2.2-million
Palm Beach--$3.2-million
Martin--$500,000
St. Lucie--$1.8-million
Indian River--$375,000

Q2:Corp vs. Leisure
C/L
Palm Beach--60/40
Palm Beach--70/30
Palm Beach--50/50
Palm Beach--50/50
Palm Beach--0/100
Martin--20/80
St. Lucie--25/75
Indian River--0/100

Q3:Service area
PB--Palm Beach
PB--Palm Beach
PB--Palm Beach
PB -Palm Beach
PB--Palm Beach
M-County and surrounding areas (Martin, St. Lucie and Okeechobee)
SL-County and surrounding areas (Martin, St. Lucie and Okeechobee
IR-County and surrounding counties

Q4:domestic vs. international
d/I
Palm Beach--50/50
Palm Beach--60/40
Palm Beach--50/50
Palm Beach--50/50
Palm Beach--60/40
Martin--65/35
St. Lucie--65/35
Indian River--70/30

Q8: Top International Destinations
Bahamas--8
Jamaica--6
London--8
Paris--8
Rome--8
Venice--5
Frankfurt--7
Tokyo--5
Rising trend: (5) to South America
Brazil--5
Argentina--3
Chili--3
Venezuela--2
Renewed interest: (2) to Australia--2
New Zealand--2

Q9: International via PBI
Air Jamaica-4
Bahamas Air-4
Delta-8
United-3
American-3
Virgin Air-2
British Airways-5
Air France-2
Italia-2
And Luftansa-3

Q10: Gateways
Miami-8
New York-6
Atlanta—5
Los Angeles—3
San Francisco—3
Notes:
(2) Miami for south and central America
(3) LA and San Fran gateways to Asia

Q11 Non-stop service
New York--8
Los Angeles-4
San Francisco-2
Newark-5
Las Vegas-3
Boston-4
Dallas-4
Denver-3
Washington-2
Providence-1
Chicago-1

International non-stops:
Bahamas-2
London-3
Rome-2
Paris-2
(5) said non-stop especially important to business

Q12 Attributes
a. Location--8
b. Easy access to I-95-7
c. Parking
d. Terminal-8
e. Speed of passenger processing-4
Other: (please explain)
Notes:
- Parking (problem-Boca Raton / construction issue);
- Could improve during season and holidays -- 5
- Terminal is comfortable and pretty (Martin and St. Lucie)
- It's good for seniors. It is easier to get around because everything is self-contained and not spread out throughout the airport
- Offered good variety of shops and restaurants—4
- Corporate felt internet access and business services were great--1

Q13 adv. PBIA vs. FLL
PB—location; proximity to work or home; new area has been a smart addition with computer hook-ups has led to more reservations.
PB—location easy to get there from anywhere people live or downtown where most people work or have business
PB—location; new southwest wing; business center area
PB—location; not overwhelmed with a lot of processing; new wing and non-stops to NY by southwest; internet access if passengers delayed (large corporate business) believes this has helped business
PB—location; closeness to where people are going and coming from
M--- easy to get to off interstate; easy for passengers to get through process
SL—easy off-I-95;
IR—can give simple directions because it is off I-95 (has a big seniors market); airport is smaller so passengers can get from check out to plane easier.

Q14 FLL vs. PBIA
PB—more non-stops; cheaper rates
PB—more non-stops; usually can getter better rates
PB—more non-stops; lower fares
PB—non-stop flights; less expensive
PB-- hates FLL and doesn't use unless customer insists
M—more non-stops; consistently lower fares
SL—more non-stops to more locations; cheaper rates
IR—doesn't like FLL; has gotten a lot of complaints and much further for customers

Q15 PBIA vs. MIA
PB—location, smaller
PB—location, ease of travel
PB—location, more comfortable because it is smaller
PB—location, ease of travel
PB—location, processing faster and easier
M—location, can get from car to plan without a lot of hassle
SL—location, smaller, feels easier
IR—location, security and ticket processing easier

Q16: Advantages MIA vs. PBI
More international flights--8

Q17: Fares
PB--usually higher
PB—higher but recently starting to see get closer in price
PB—slightly higher, but gap is closing—fares are often higher than FLL, but getting better
PB—competitive
PB—fares can be $50 or more
M—about the same
SL—higher than FLL, but not as much as in the past
IR—usually higher fares but coming down
Note: All say $50 or more can deter to another airport, especially in leisure travel

Q18: One-year summary
No--8
Not enough personnel, time to go through archives
Info leaves screen when passenger takes off
In archives; impossible request; ridiculous when you have a small business

Q19 Flight schedule on web site
PB-yes
PB-yes
PB-yes; some but can't trust real time data
PB-yes
PB-yes
M- no.
SL-yes
IR-yes. Just to see what options are but doesn't depend on times. Doesn't feel time schedules are reliable.
No recommendations

Q 20: Use of NetJets
PB-No
PB-No
PB-No
PB-No
PB-No; never heard of it but does little corporate travel
M-used a couple of times through PBI
SL-used twice through PBI (special customer does not expect return business)
IR-No

Hotels / Resorts

1. Corporate vs. leisure

C/L
PB-60/40
PB-95/5
PB-55/45
PB-70/30
Martin-70/30
St. Lucie-50/50
Indian River-45/55

2. Domestic vs. international

D/I
PB-80/20
PB-90/10
PB-97/3
PB-50/50
M- 95/5
SL-98/2
IR-65/35

3. % air travel through PBIA vs. FLL

PB—50
PB---70
PB—98
PB—70
M-70
SL-65
IR-30

4. Which airlines are your domestic guests using?

PB-Delta
PB-Delta,
PB-Delta, Southwest, Jet Blue
PB-Delta, Continental, Southwest
M- Delta, Southwest, US Air, American
SL-Delta, Southwest, US Air
IR- Delta, US Air, American

5. What airlines are your international guests using?

Delta-6
American-5
British Air-6
Bahamas Air-4
Air Canada-4
Virgin Atlantic-4
Luftansa-4
Jamaica Air-1
Continental-1
Air France-1

6. What are the top domestic markets?

New York-7
Newark-6
Philadelphia-6
Boston-7
Atlanta-5
Florida-7
Los Angeles-3
San Francisco-3
Las Vegas-3
Denver-3

7. Top international markets

London-7
United Kingdom-4
Germany-3
Frankfurt-5
Bahamas-4
Jamaica-3
Canada-4

8. Primary gateways

Miami-6
Orlando-1
New York-5
Atlanta-5

9. Non-stop service / new or increased service

New York-8
Newark-4
Boston-7
Philadelphia-8
Los Angeles4
Denver-2
Las Vegas-4

10. Seasonal variation

Increased room rates—summer-5
Increased travel from northeast-7

11. What attributes of PBI do you like:

a. Location--6
b. Easy access to I-95--7
c. Parking--4
d. Terminal
e. Ease of Passenger processing
f. Other

12. Advantages of PBI over FLL

Location-6
Smaller size-4
Friendly personnel-2
Security less stressful-2

13. Adv. Does FLL have over PBI

More non-stops-7
Better rates—7

14. Adv. PBI over MIA

Location-7
Easy Access-6
Relaxed atmosphere/comfortable surroundings-2

15. Adv. Over PBI

International flights-7
International flights to more locations-5

16. How do fares compare at PBI over FLL? What impact does this have on guests?

Higher at PBI-6
Slightly higher-1
Notes: 3 said getting more competitive
Two said greater impact on leisure travel than corporate

Corporations

1. How much money do you spend annually for corporate air travel?

PB--$2-million
PB--$13,000
PB--$22,000
PB--$36,000
PB--$7,725
M-$15,000
SL-$27,575
IR--$100,000

2. How important is convenient and efficient air service to your operations?

Critical- 8

3. What % of corporate flights occur through PBI over FLL?

PB-100
PB-100
PB-100
PB-75
PB-98
M-90
SL-75
IR-50

4**. Primary Carrier**

Delta-6
Continental-2
US Airways-1
Air Tran-1
Reasons:
Low rates—2
Convenient flight schedules--6
Frequent flyer points-3

5. Preferred provider

Yes: 2
No: 6

6. What are your top domestic destinations for corporate air travel?

Wash DC-6
New York-6
Newark-5
Boston-5
Atlanta-4
Dallas-4
Philadelphia-4
Los Angeles-3
Houston-3
San Francisco-2
Denver-2
Wichita, KS-1

7. Corporate International

London-3
Tokyo-3
Montreal-2
Frankfurt-2
Moscow-1
Singapore-1
Athens-1
Mexico City-2
SaoPaolo-1
Paris-1

8. International Gateways

Miami-7
New York-6
Atlanta-4
Los Angeles-3

9. Domestic locations new or increased non-stop service

New York-6
Philadelphia-4
Los Angeles-2
Houston-1

10. Attributes

a.Location – 8
b.Easy Access-8
c. Terminal-2

11. Advantages of PBI over FLL

Location-8
Easy Access to I-95-8

12. Advantages FLL vs. PBI

More non-stop flights-5
No advantage-3

13. Advantages vs. MIA

Location -8
Easy access to I-95-8

14. Advantages MIA over PBI

More flight schedules-6
More flights to international-6

15. How do fares at PBI compare with those at FLL? Impact?

Competitive-6
Higher-2
Note: All 8 respondents noted that the difference in fares isn't enough to make a difference in bookings. Flight schedules are most important.

16. Flight schedules on Web site
PB-yes; extensively
PB-yes; a lot
PB-yes; very much so
PB-yes
PB-yes;
M-yes, but doesn't depend on times especially when changes may be made last minute due to weather
SL-yes
IR-yes, but can't count on times. Her customers are further from the airport so even if they check schedule it could change again.

17. Net Jets?
PB-No
PB-No
PB-yes; used three times in past year through PBI
PB-No
PB-yes; used once in past year through PBI
M-No
SL-yes used once through PBI
IR—No

18. Private Corporate jet service
PB-yes-3 in past year: PBI
PB-no
PB-no
PB-no
PB-yes, 3 in past year; PBI