



01.31.2017

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Benchmarking
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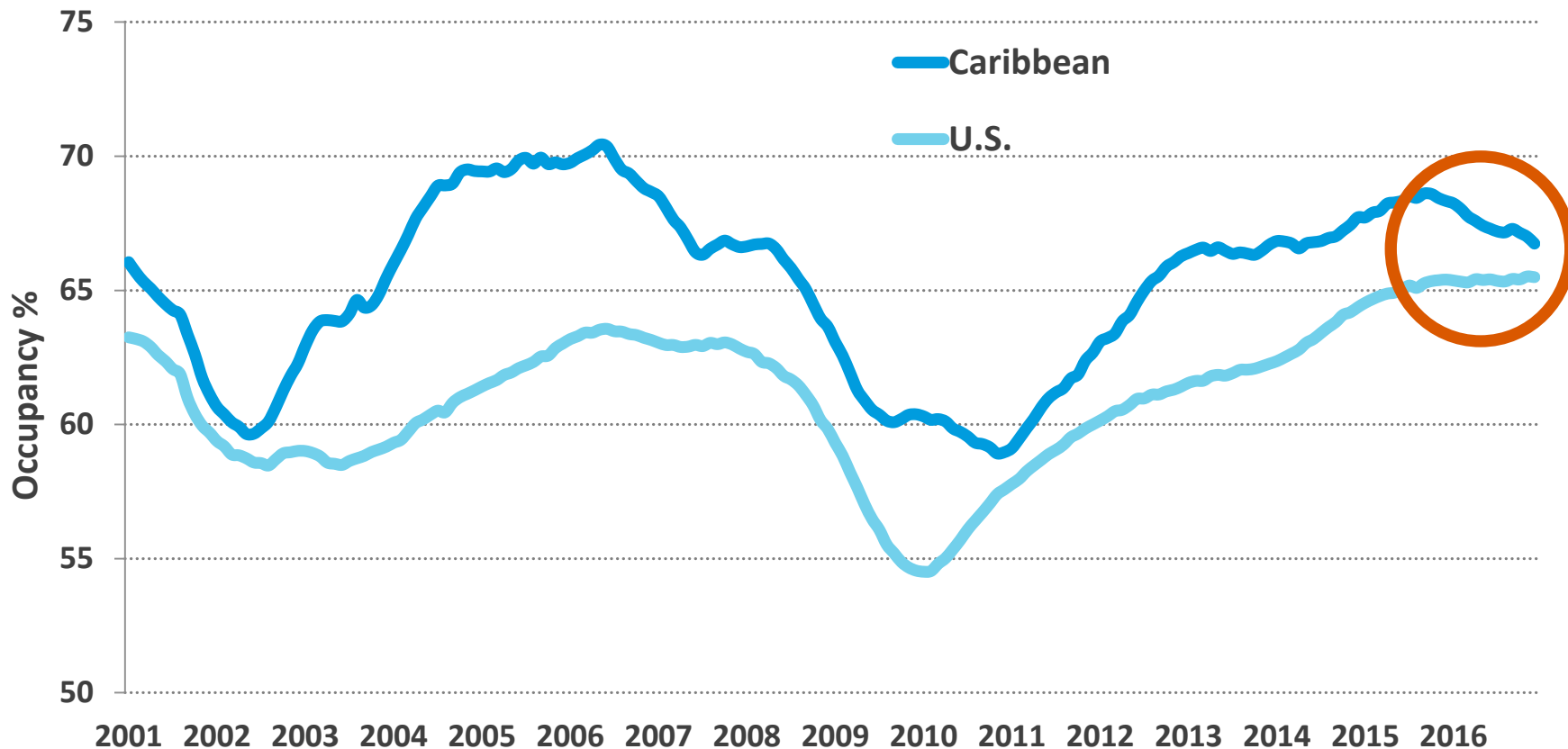
Caribbean Hotel Industry Overview

Caribbean Hotel Performance 2016

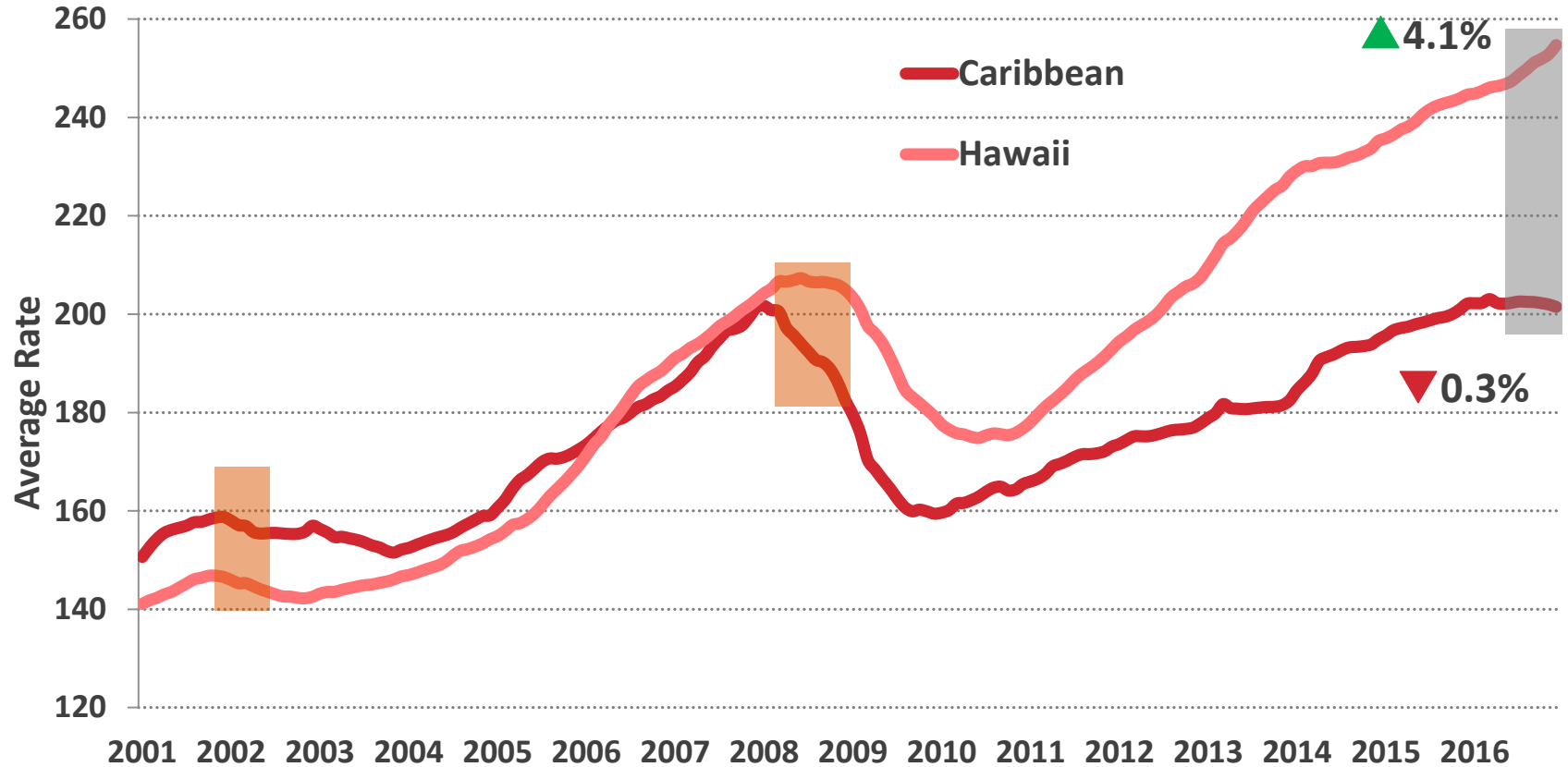


	YEAR-END 2016		CHRIS 2016
SUPPLY	87.4M	▲ 1.2%	▲ 1.0%
OCCUPIED ROOMS	58.4M	▼ 1.1%	▼ 3.2%
OCCUPANCY	66.7%	▼ 1.6 pts	▼ 2.8 pts
ADR	\$201	▼ 0.3%	▲ 1.4%
RevPAR	\$134	▼ 2.6%	▼ 2.8%

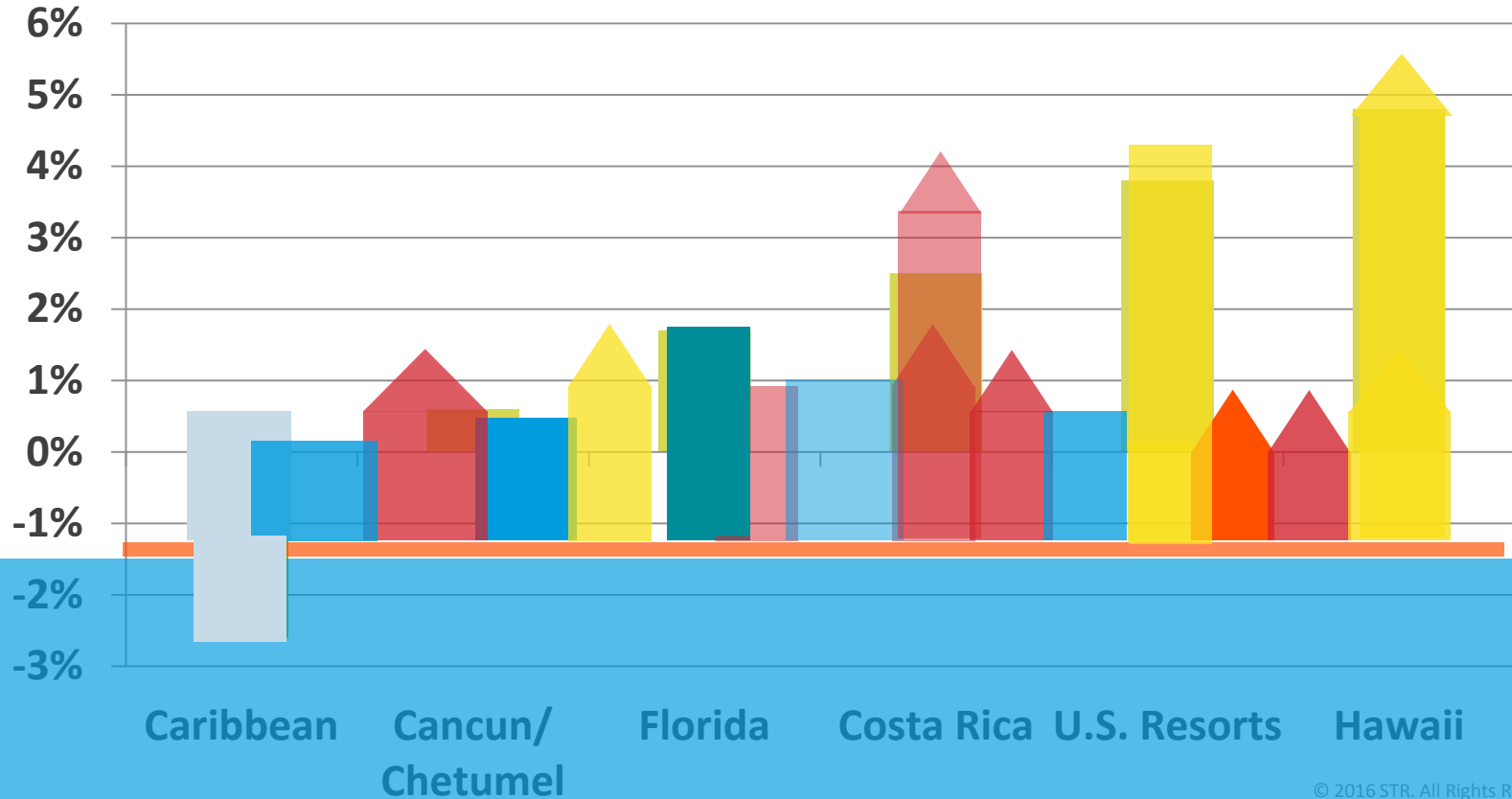
Caribbean Occupancy TTM 2001 - Dec 2016



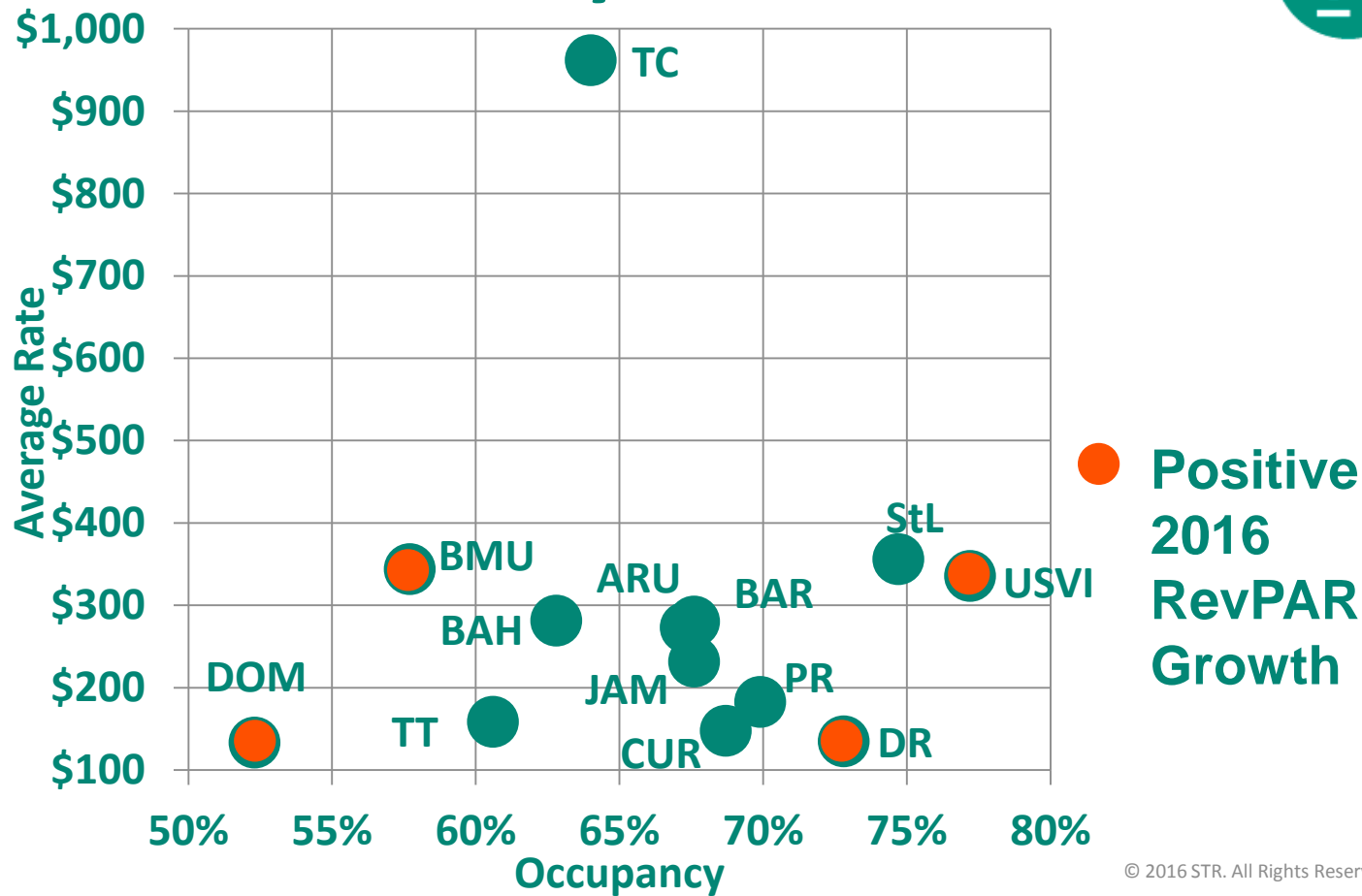
Caribbean Average Rate TTM 2001 - Dec 2016



RevPAR Change 2016



Performance by Island 2016

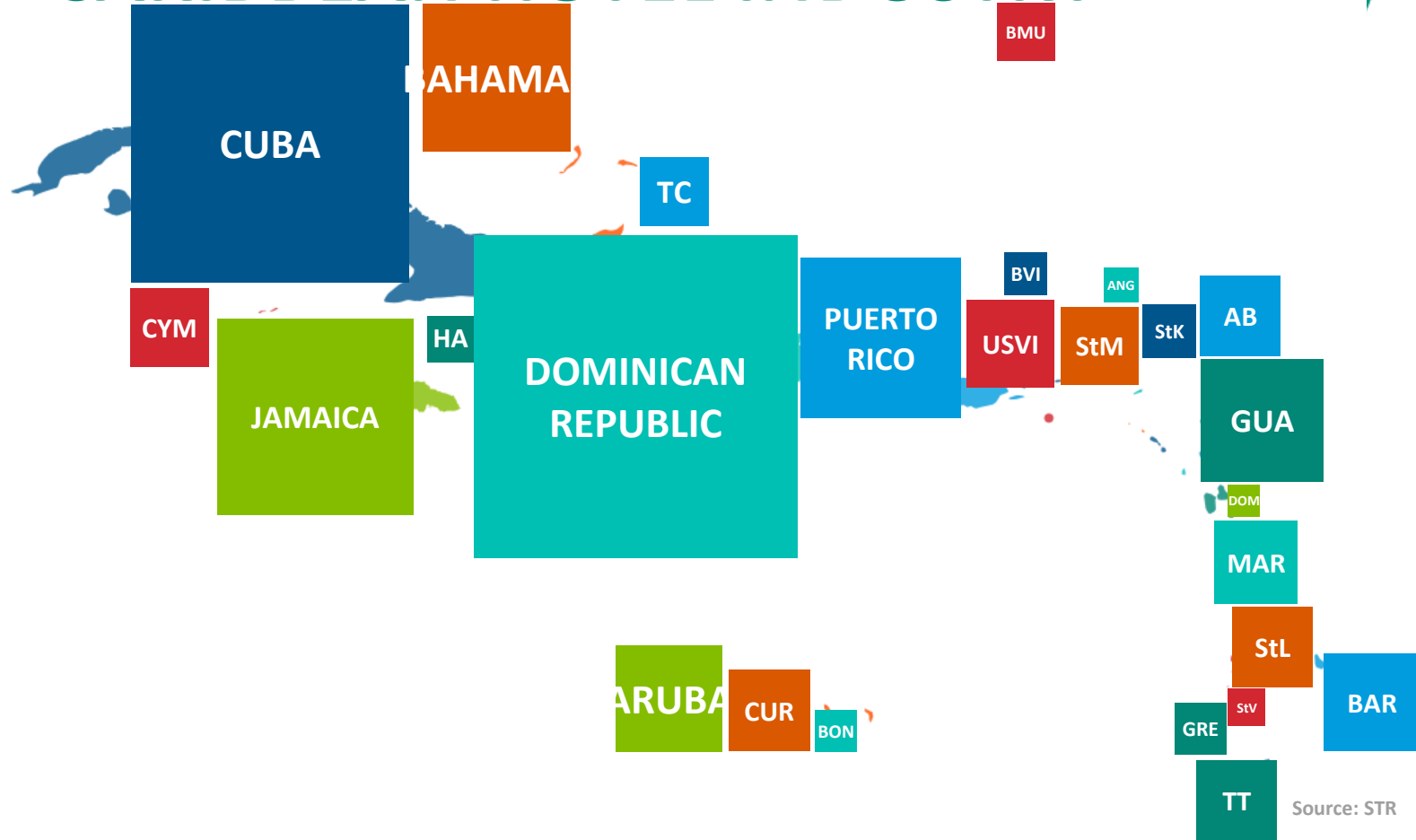


Performance by Property 2016



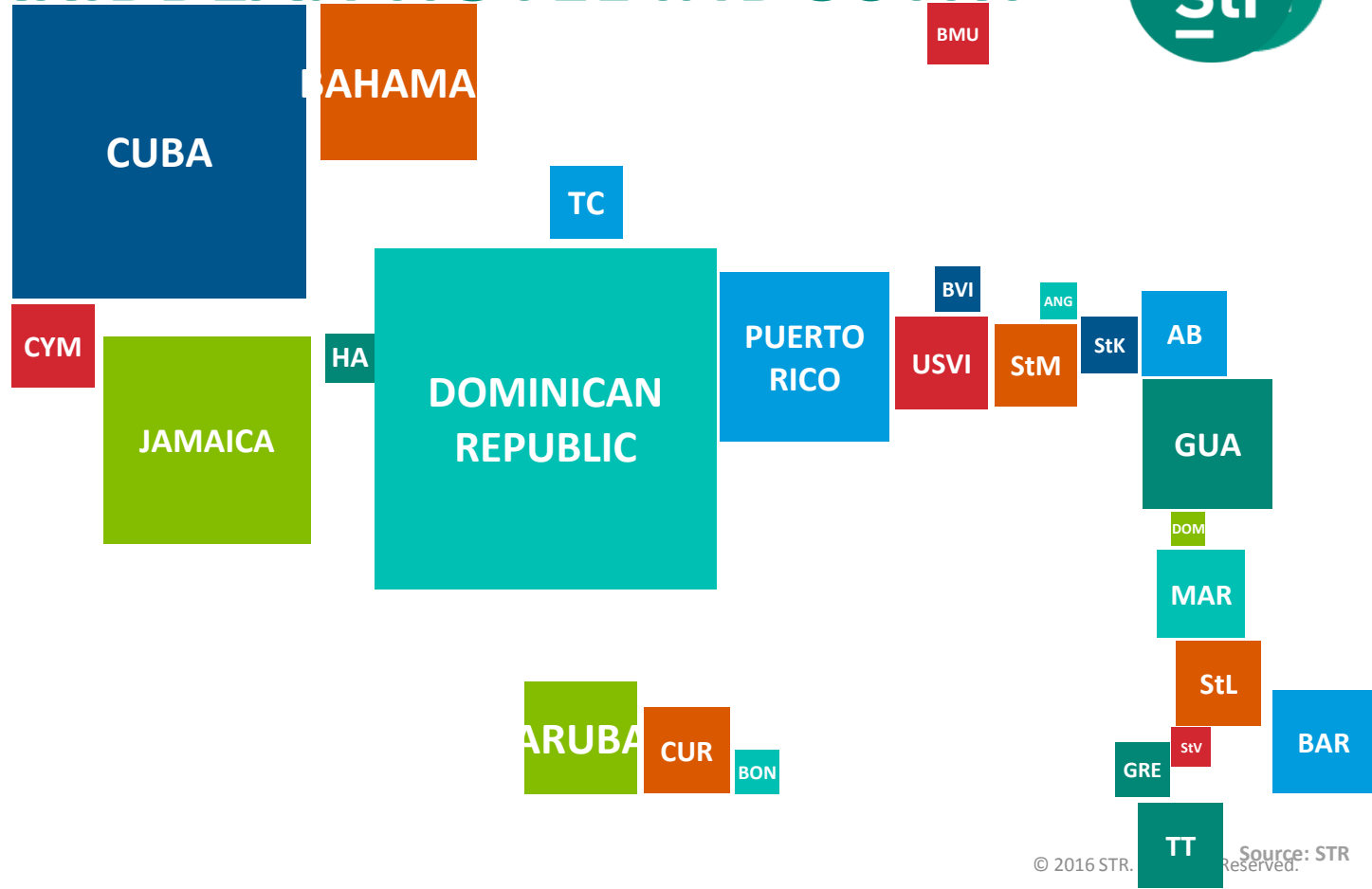
Hotels with Occupancy Declines	57%
(Almost ¼ had Occupancy Declines >7.5%)	
Hotels with ADR Declines	48%
Hotels with RevPAR Declines	52%

CARIBBEAN HOTEL INDUSTRY



Source: STR

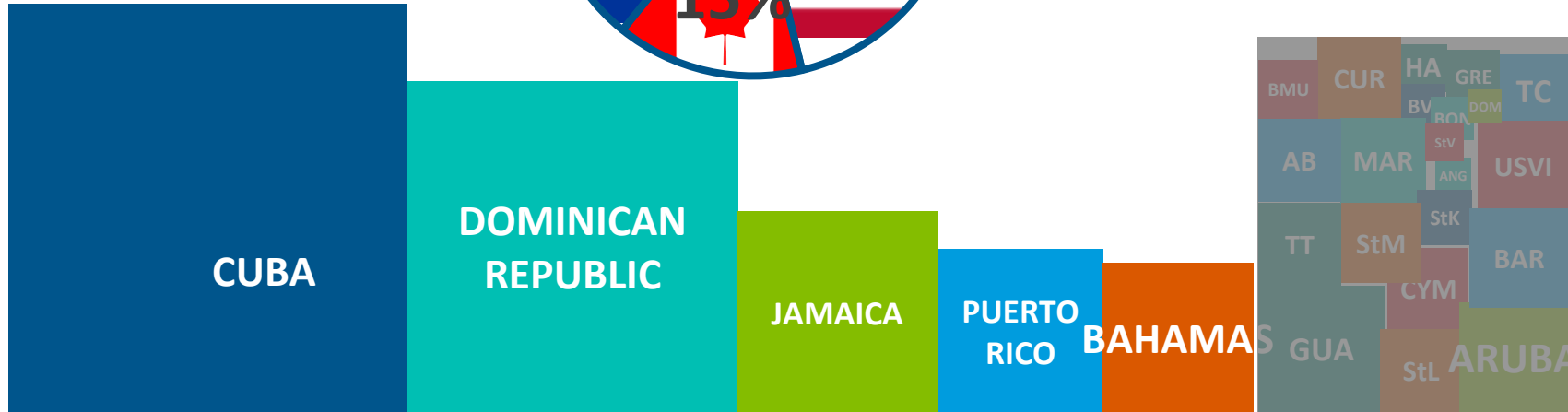
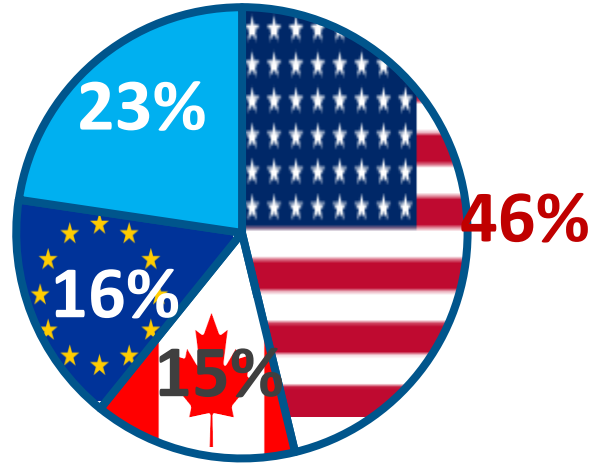
CARIBBEAN HOTEL INDUSTRY



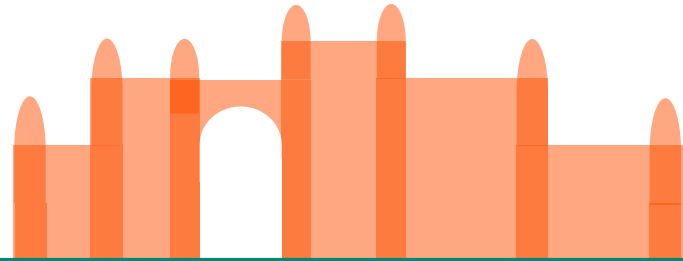
Caribbean Hotel Industry



VISITOR
PROFILE



Pipeline



Pipeline

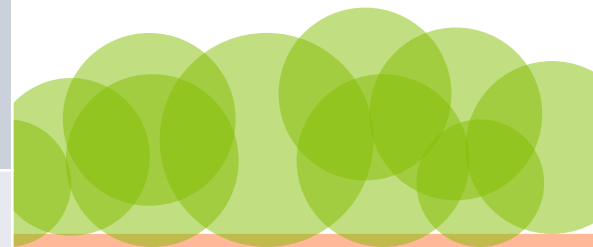


PHASE	PROJECTS	ROOMS
IN CONSTRUCTION	19	3,575
FINAL PLANNING	16	5,204
PLANNING	13	2,438
ACTIVE PIPELINE	48	11,217

Forecast



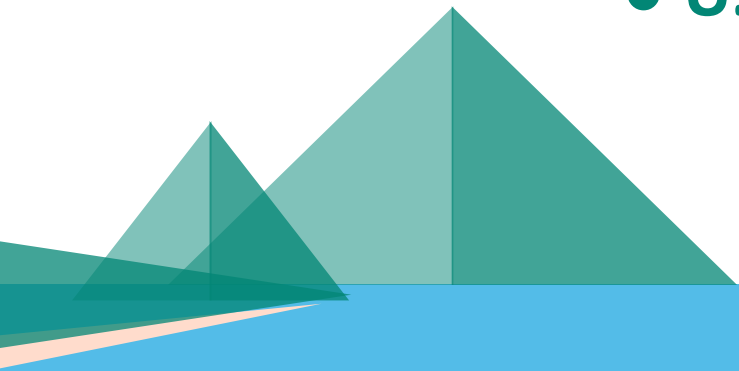
	2017
SUPPLY	▲ 0.7%
DEMAND	▲ 0.0%
OCCUPANCY	▼ 0.4pts (66.3%)
ADR	▼ 0.2%
RevPAR	▼ 0.9%



Outlook



- Demand Impact of Zika Fears Mostly Realized
 - Exchange Rates Will Hinder ADR Growth
 - U.S. Economy Still Positive
 - Still Above-Average Occupancy



Thank You!



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