



Hotel Performance in the Caribbean Region



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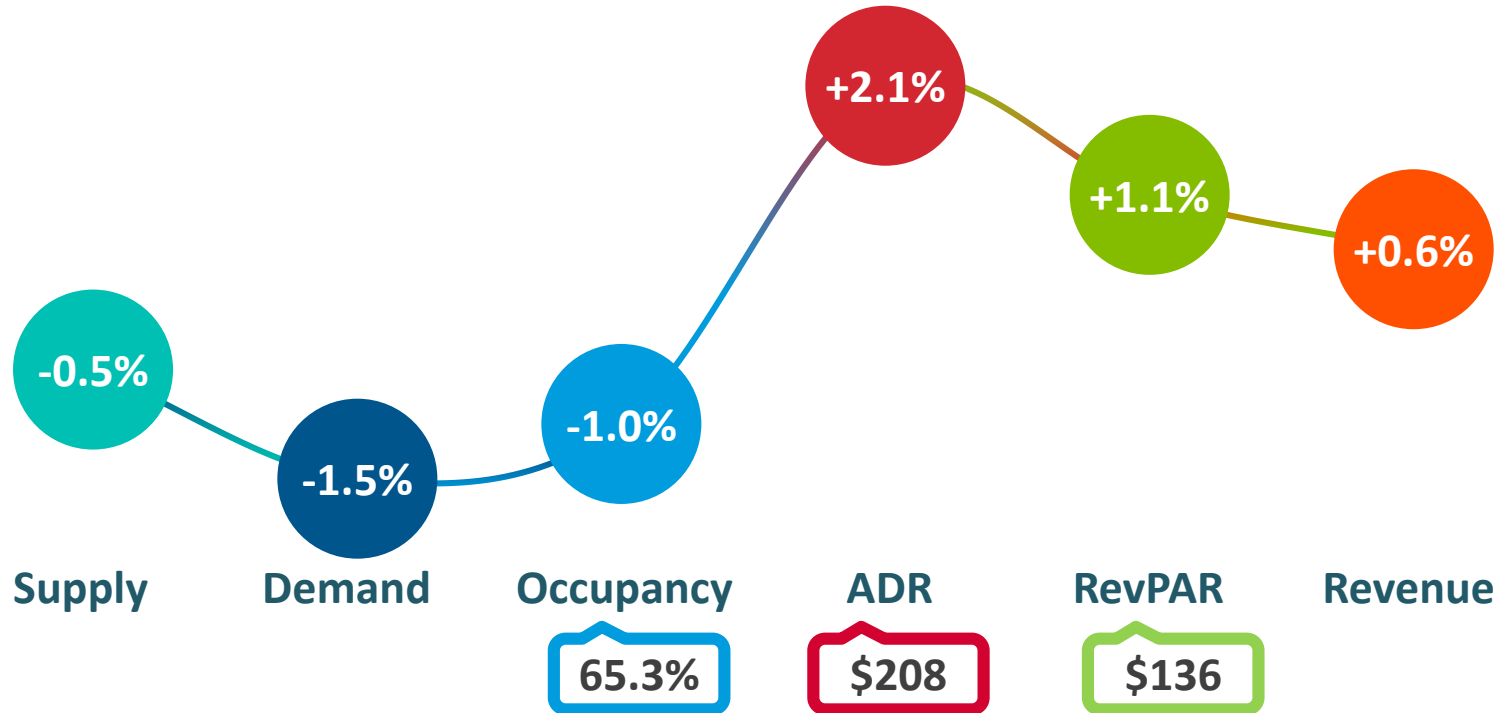
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2018—a year of recovery for the Caribbean

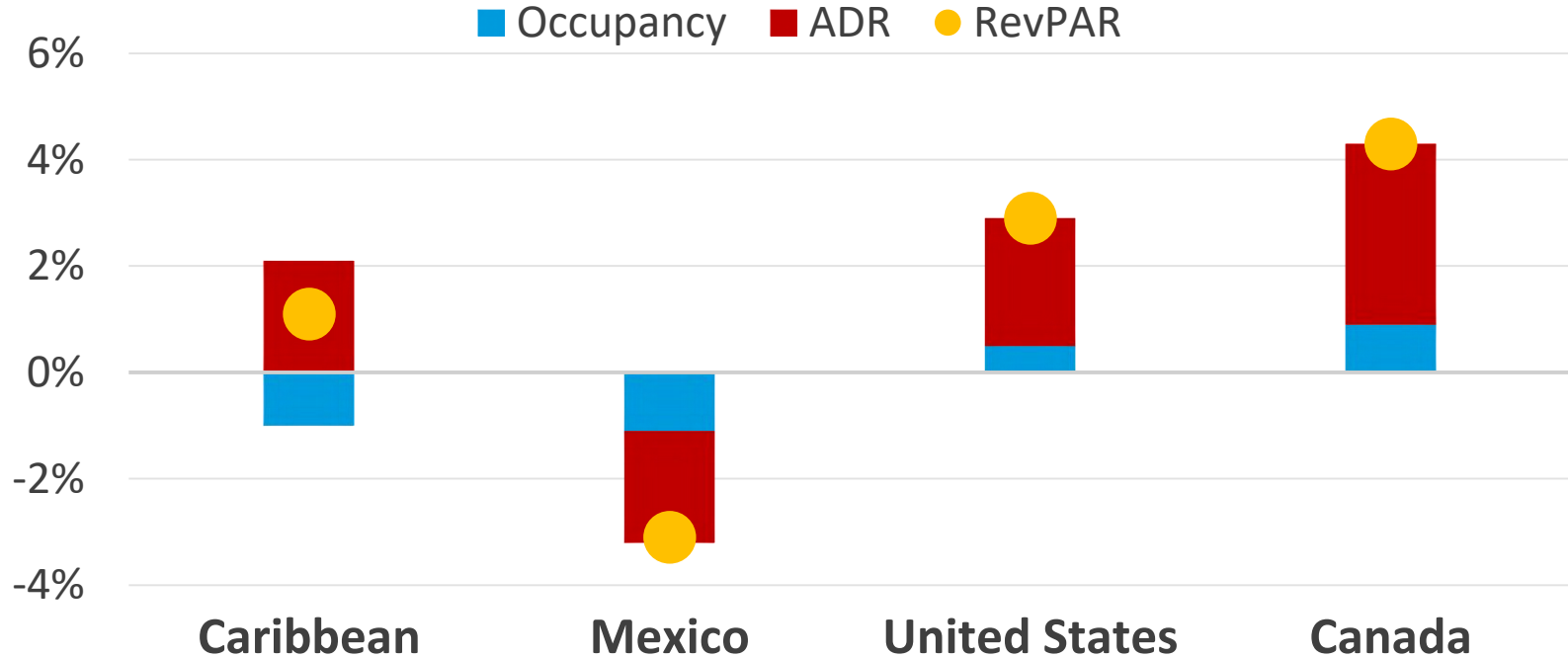
Modest RevPAR growth despite misconception about hurricane affects



Full Year 2018 % Change (USD), Total Caribbean Region

2018 across North America

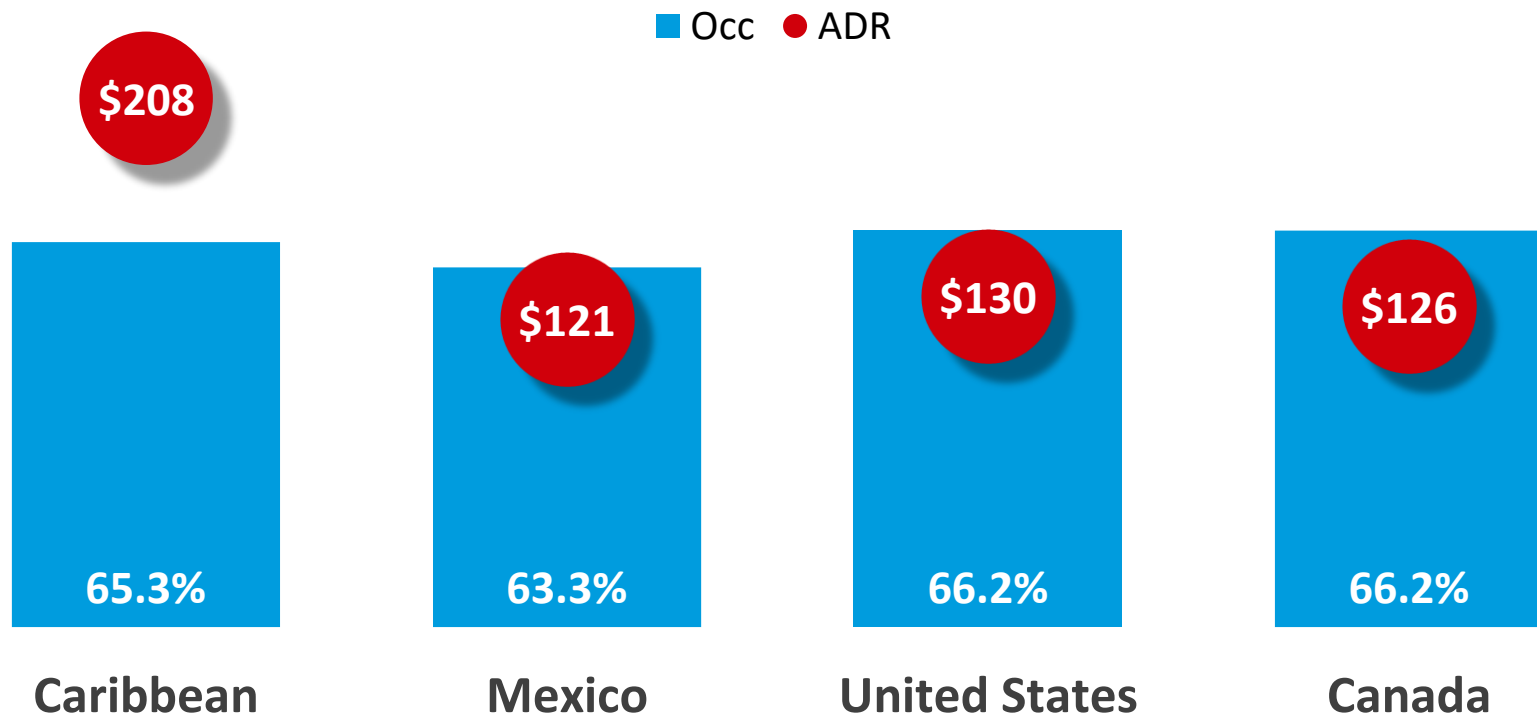
A tough year for Mexico; all others drove RevPAR growth with ADR increases



Full Year 2018 RevPAR % Change by Contribution of OCC/ADR % Change (USD), Caribbean Region & Select Countries

2018 across North America

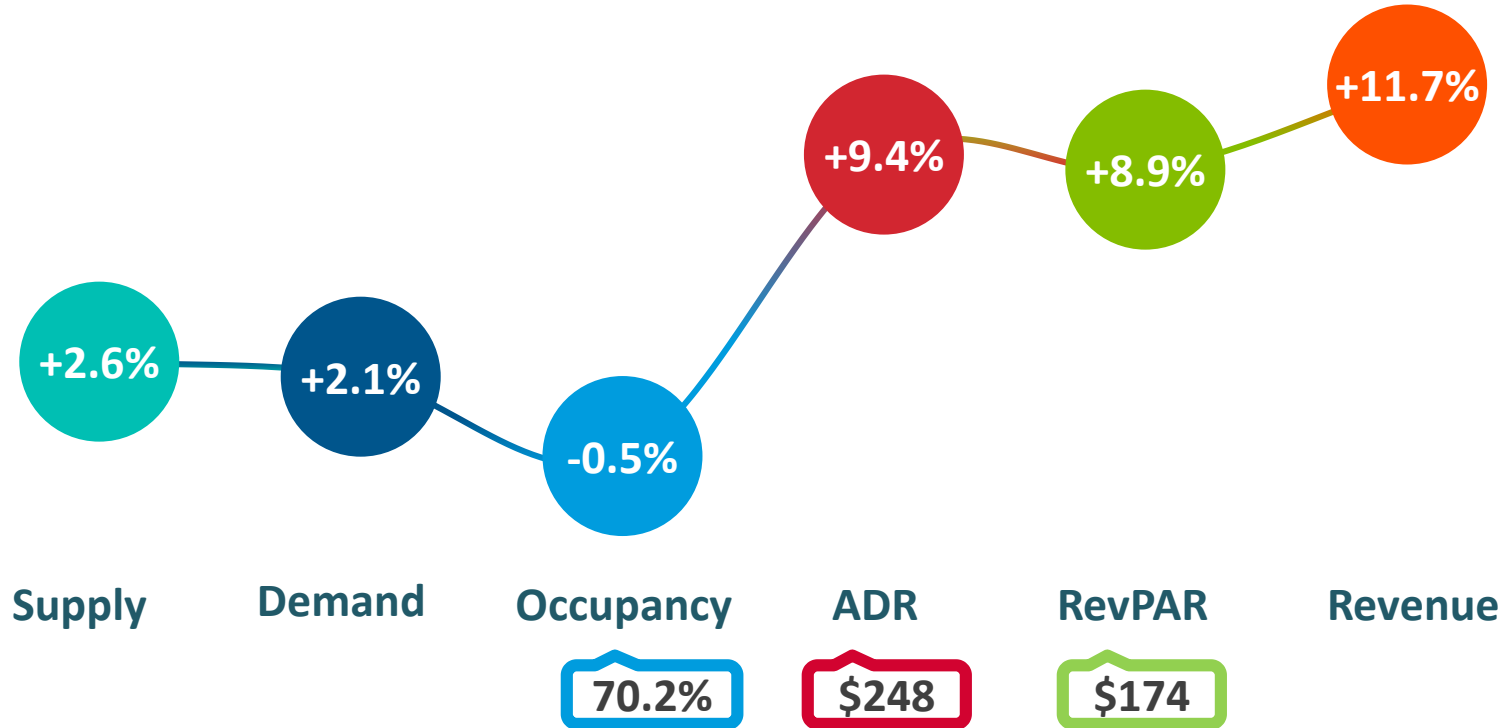
High-end Caribbean resorts push ADR over \$200



Full Year 2018 OCC & ADR (USD), Caribbean Region & Select Countries

A great start for the Caribbean so far in 2019

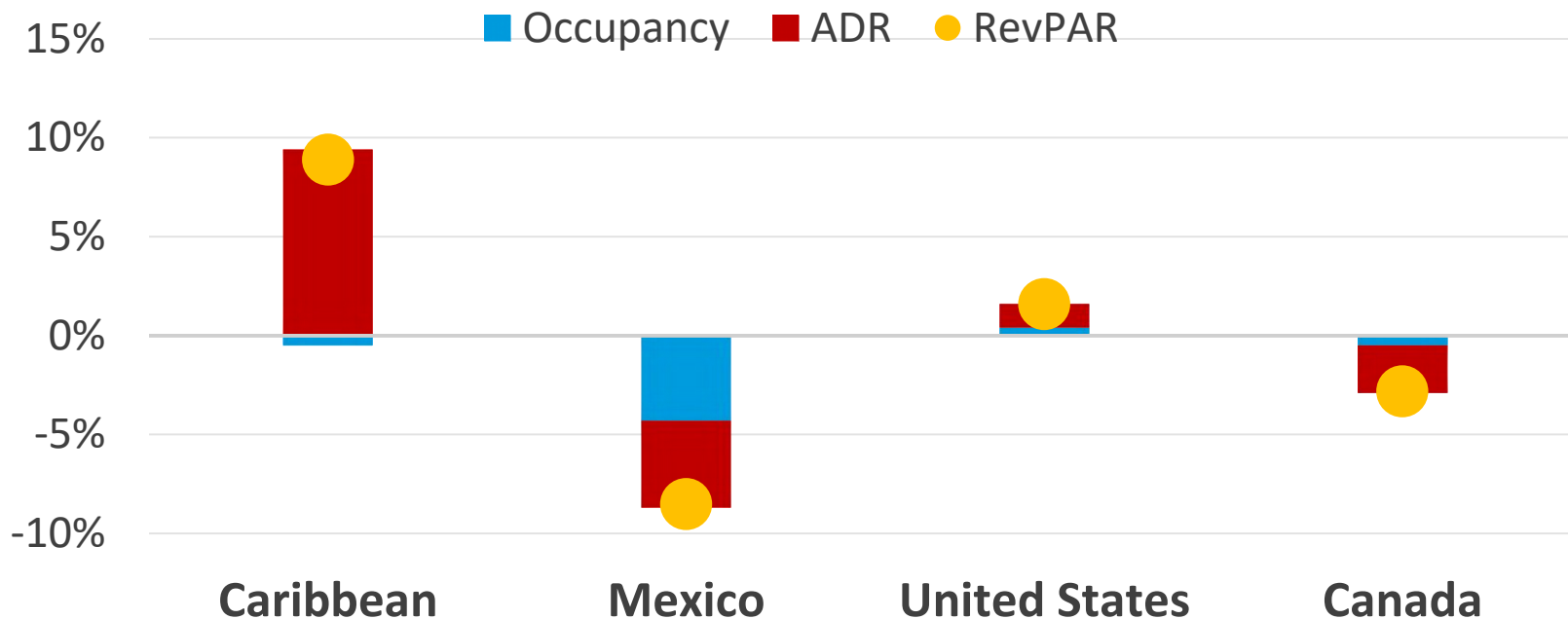
On pace for a record-breaking year



YTD May 2019 % Change (USD), Total Caribbean Region

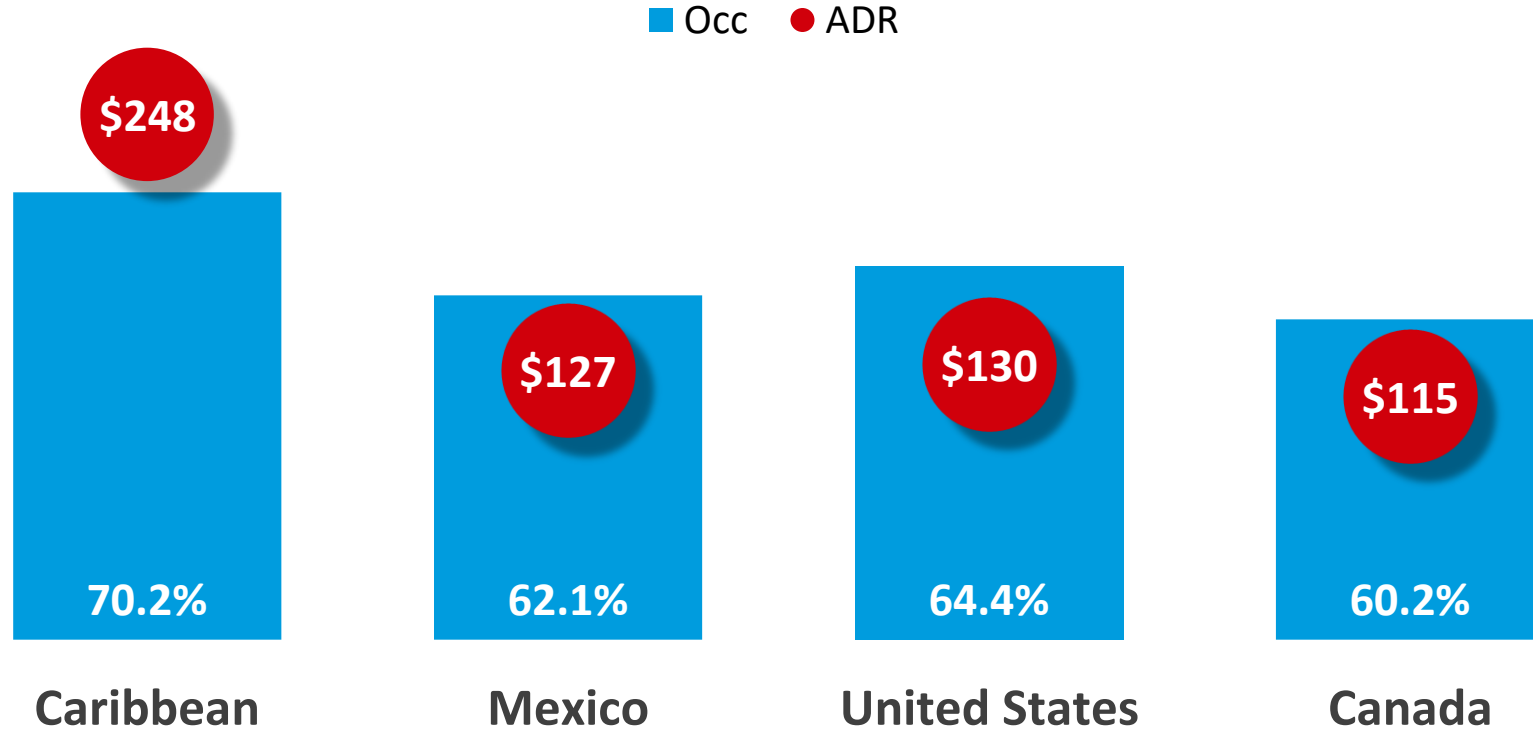
The Caribbean's high-season has everyone else looking green

With envy, not dollars



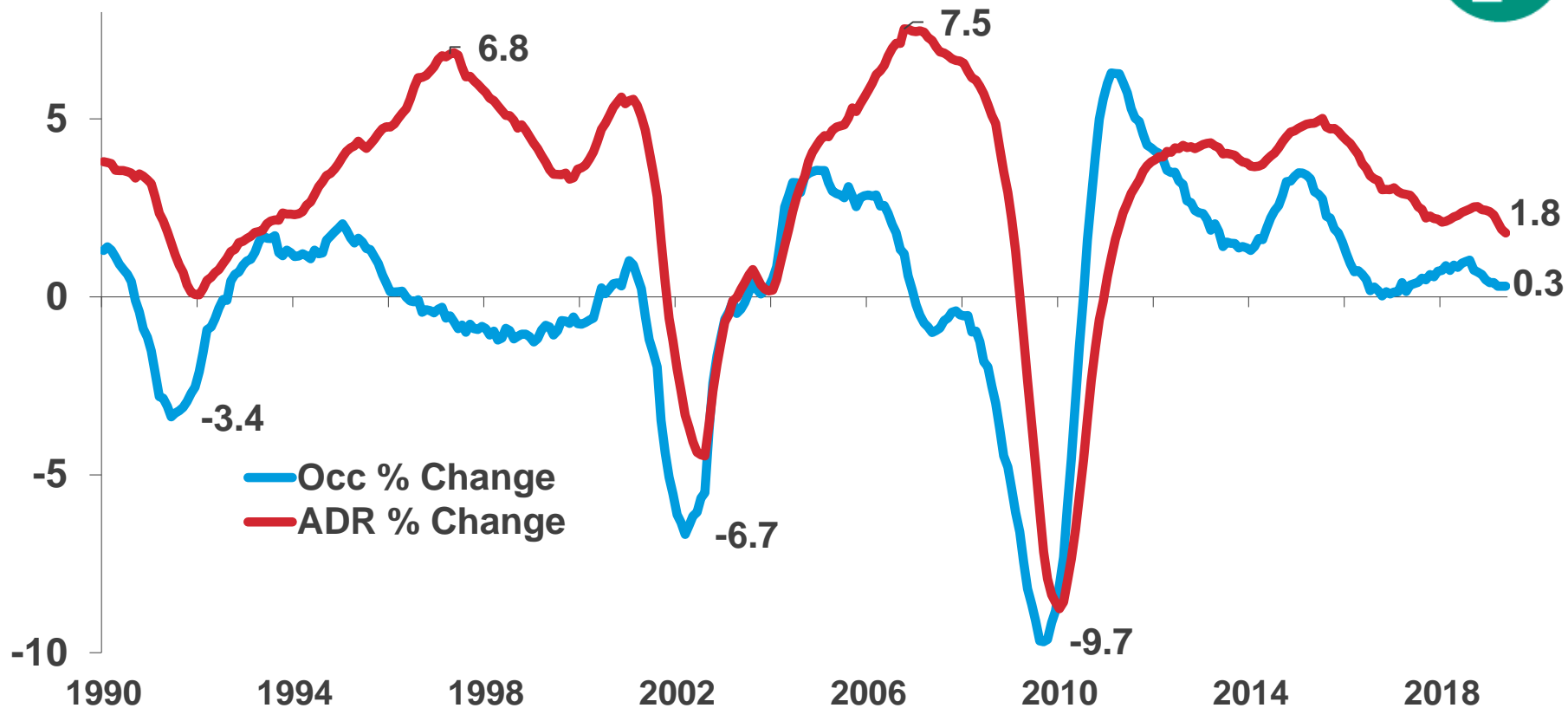
YTD May 2019 RevPAR % Change by Contribution of OCC/ADR % Change (USD), Caribbean Region & Select Countries

The rest of North America is ready to start their high season



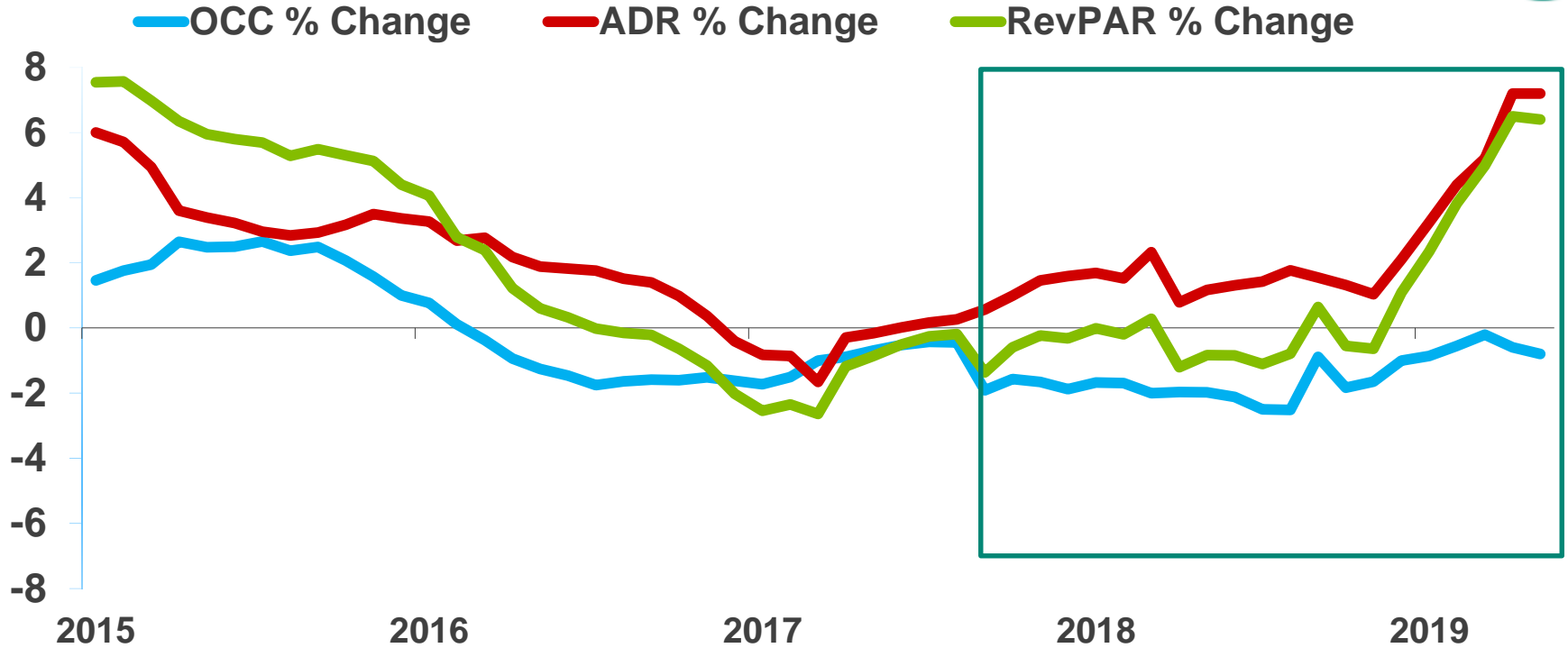
YTD May 2019 OCC & ADR (USD), Caribbean Region & Select Countries

It's not just seasonality—things seem to be slowing down for US



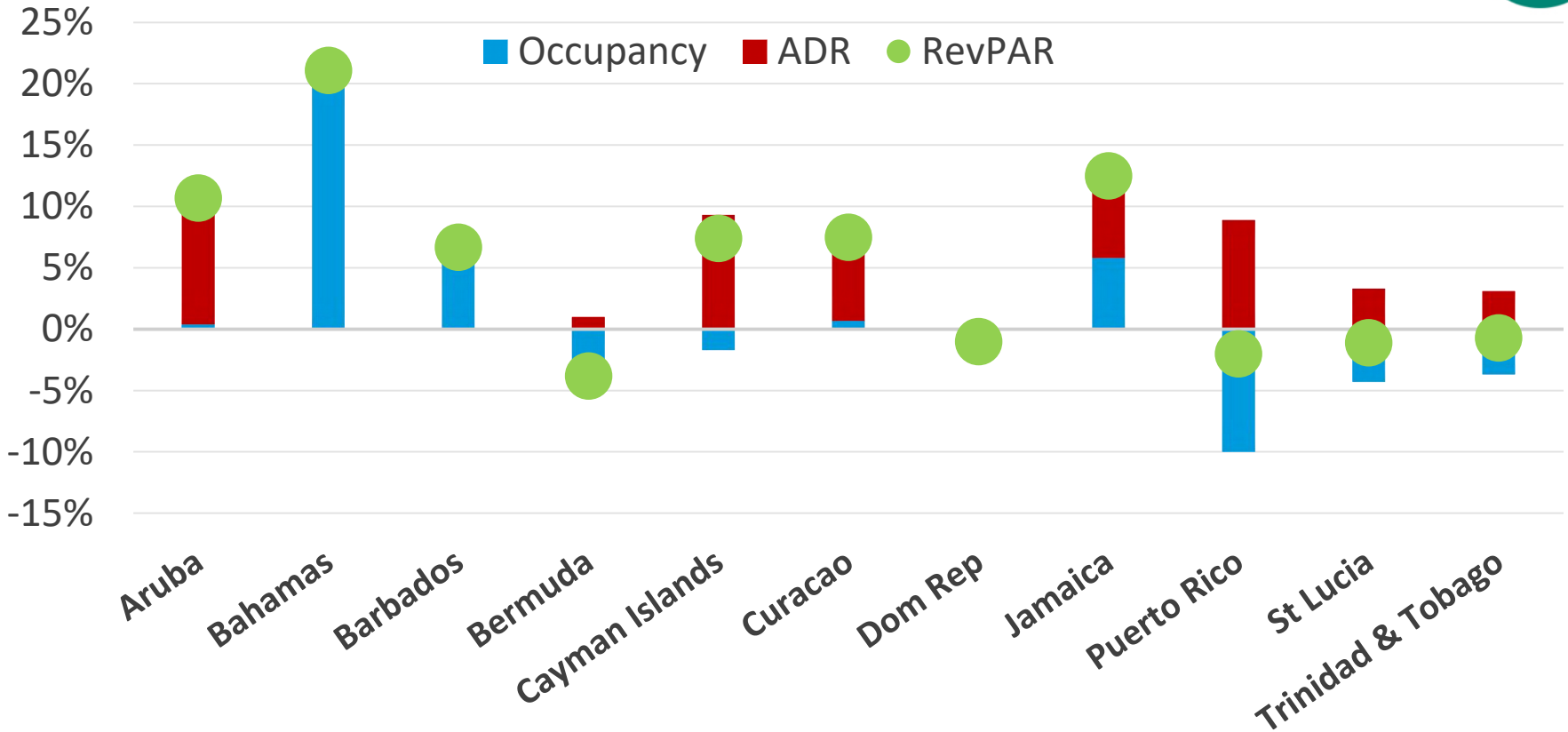
Total US, OCC & ADR % Change, 12 MMA 1/1990 – 05/2019

Upward trends for the Caribbean—were the hurricanes a reset?



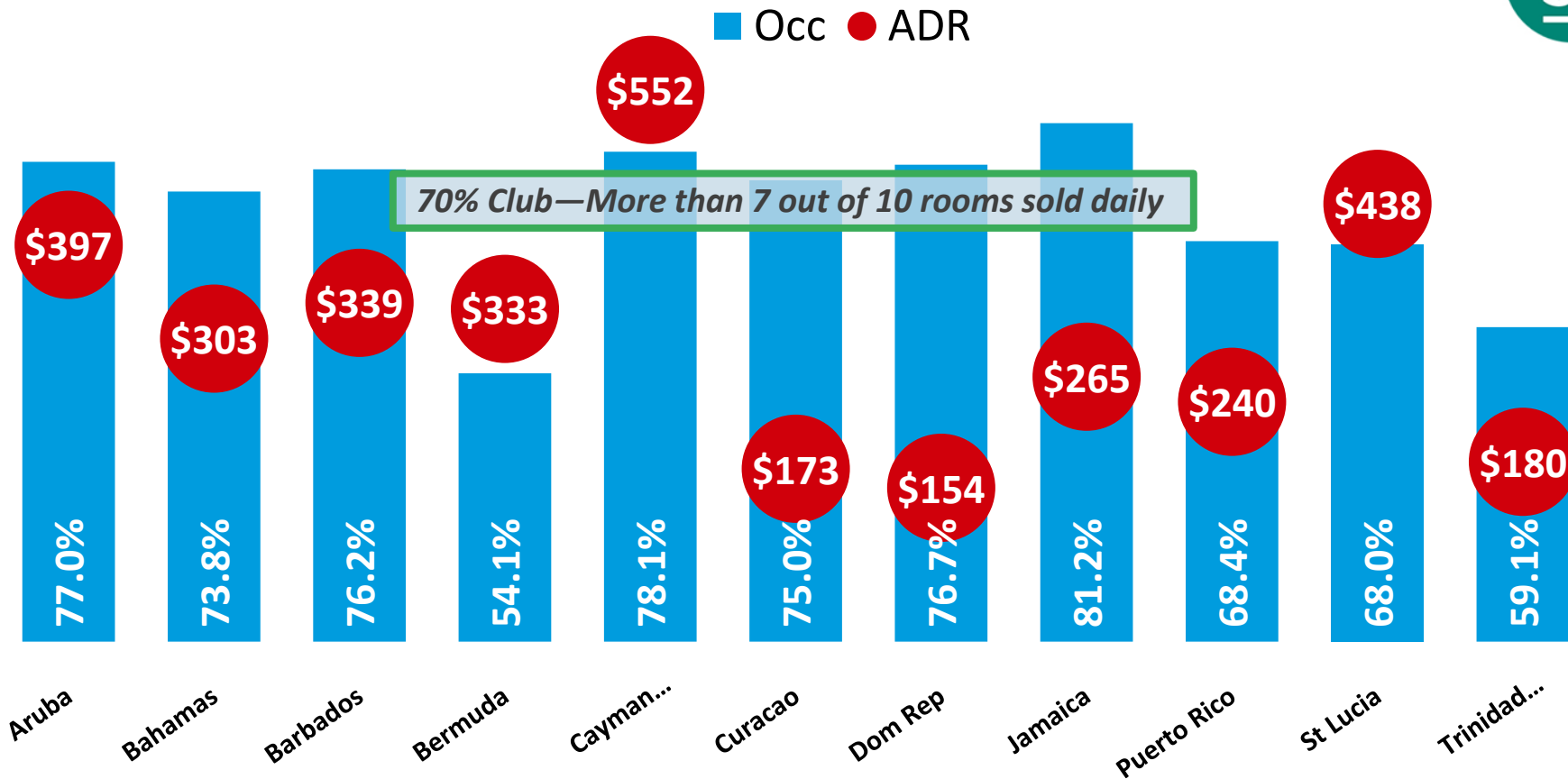
Caribbean Region, OCC, ADR & RevPAR % Change, 12 MMA 1/2015 – 05/2019

One Caribbean, but many different markets with different results



YTD May 2019 RevPAR % Change by Contribution of OCC/ADR % Change (USD), Select Caribbean Markets

Jamaica leads in Occupancy, Cayman Islands in ADR



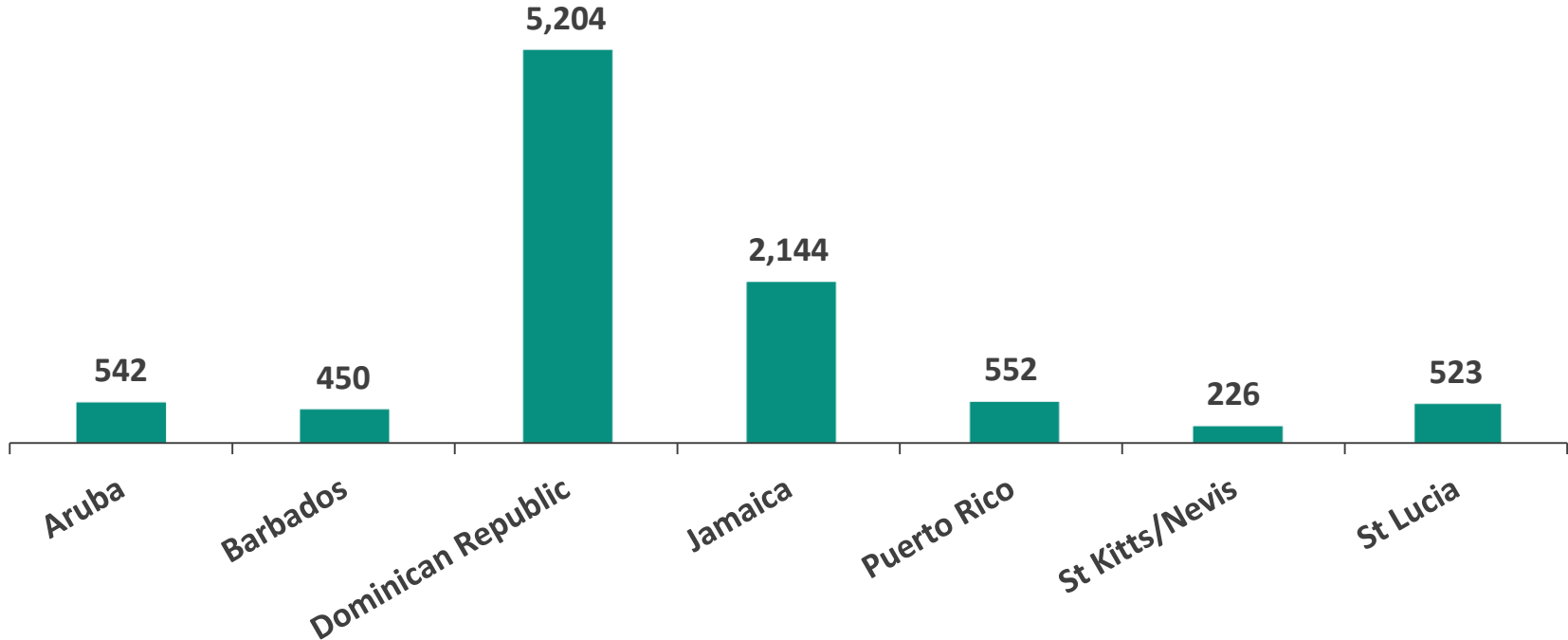
Supply Growth—another indicator of the Caribbean recovery



Phase	Projects	Number of rooms
In Construction	47	11,708
Final Planning	35	9,074
Planning	37	5,287
Active Pipeline	119	26,069

Pipeline by Phase, May 2019—Total Caribbean

Welcome to the Dominican Republic—here's your hardhat



Rooms in Pipeline (Construction Phase Only), May 2019—Select Caribbean Markets

Thank You!



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