



CARIBBEAN  
HOTEL & TOURISM  
ASSOCIATION



# Hotel Trends in the Caribbean

## Recent Performance and How Wellness Can Boost Your Bottom Line

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**Benchmarking**  
↑ your world

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**The Caribbean & North America**

**Key Caribbean Destinations**

**Wellness Trends in Hospitality**

**Conclusion**

# | The world's largest hotel performance sample



Data from

**180** countries



**66,000**

hotel customers  
globally (properties)

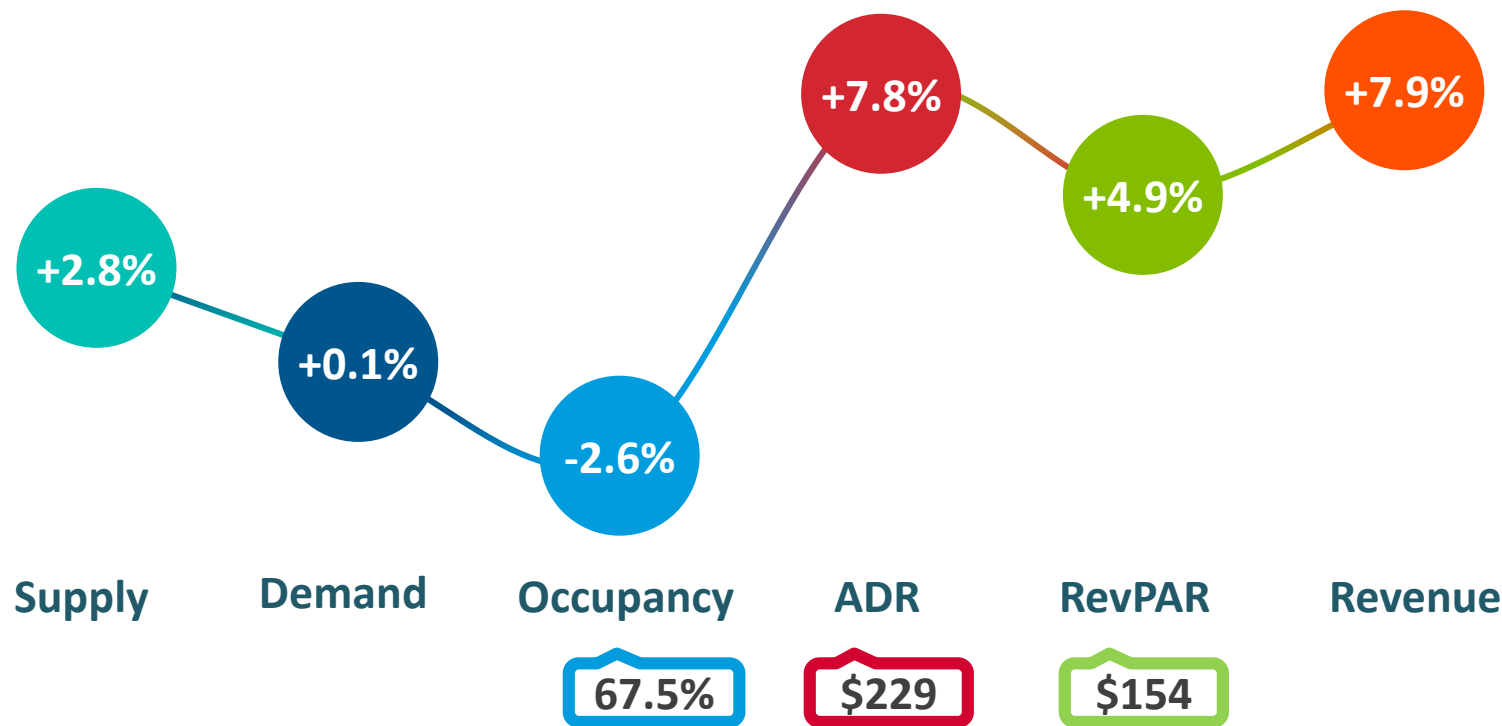


**8.9 million**

rooms on the platform

# A great start for the Caribbean so far in 2019

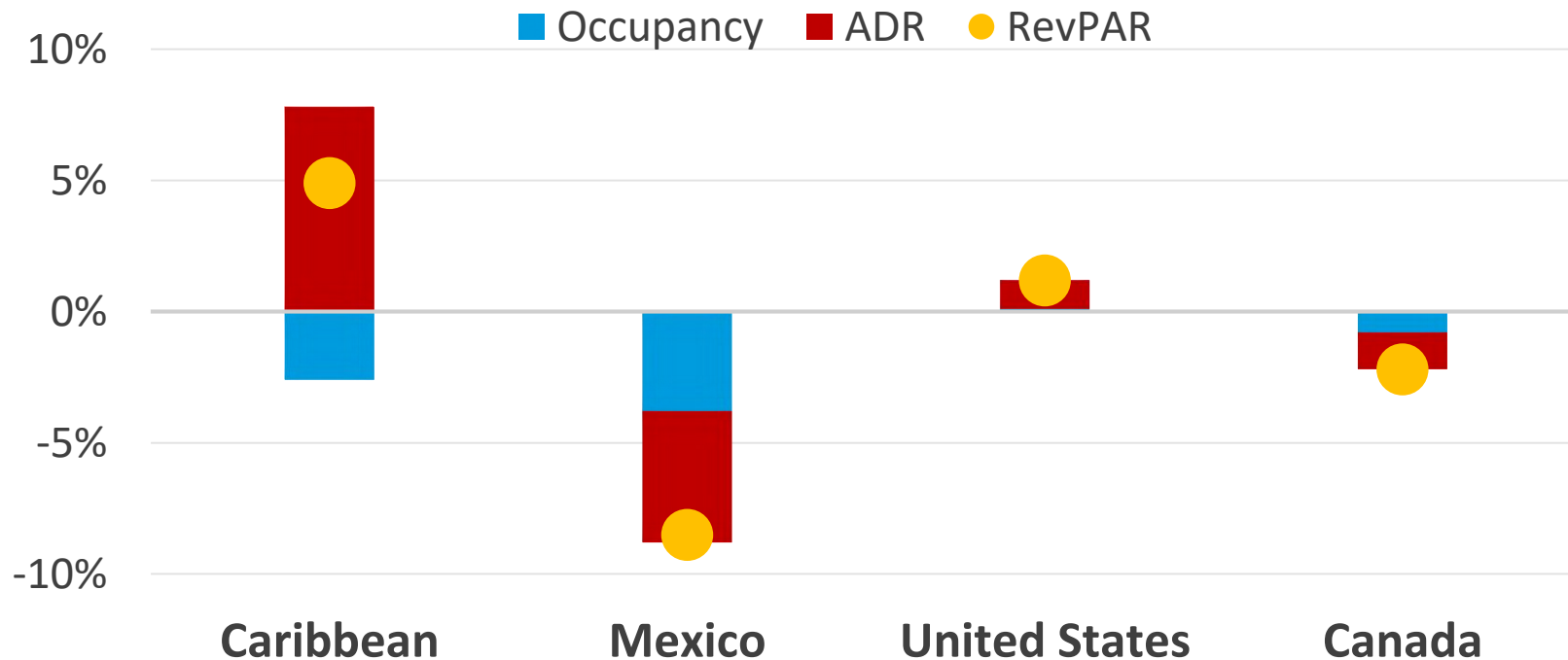
On pace for a record-breaking year



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

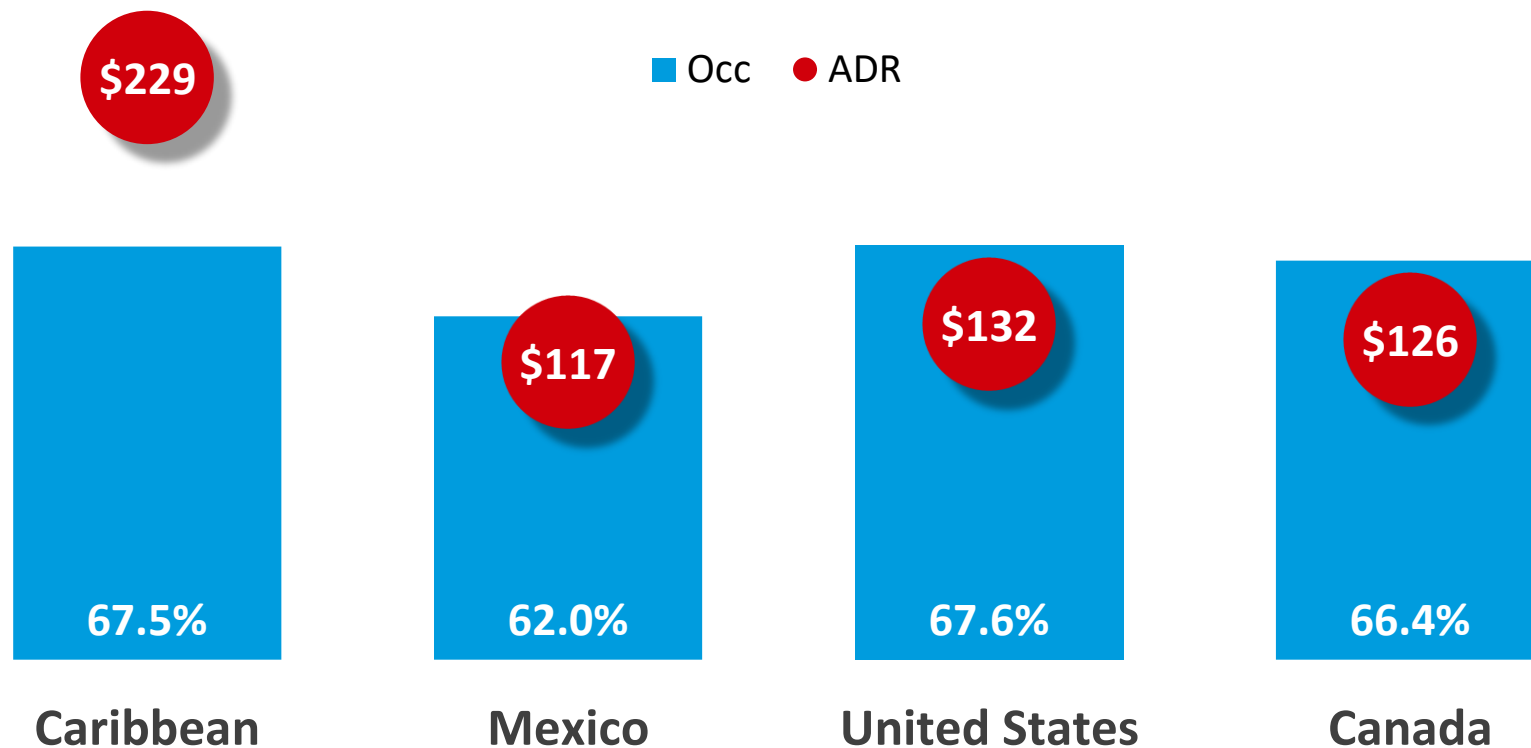
# The Caribbean has everyone else looking green

With envy, not dollars



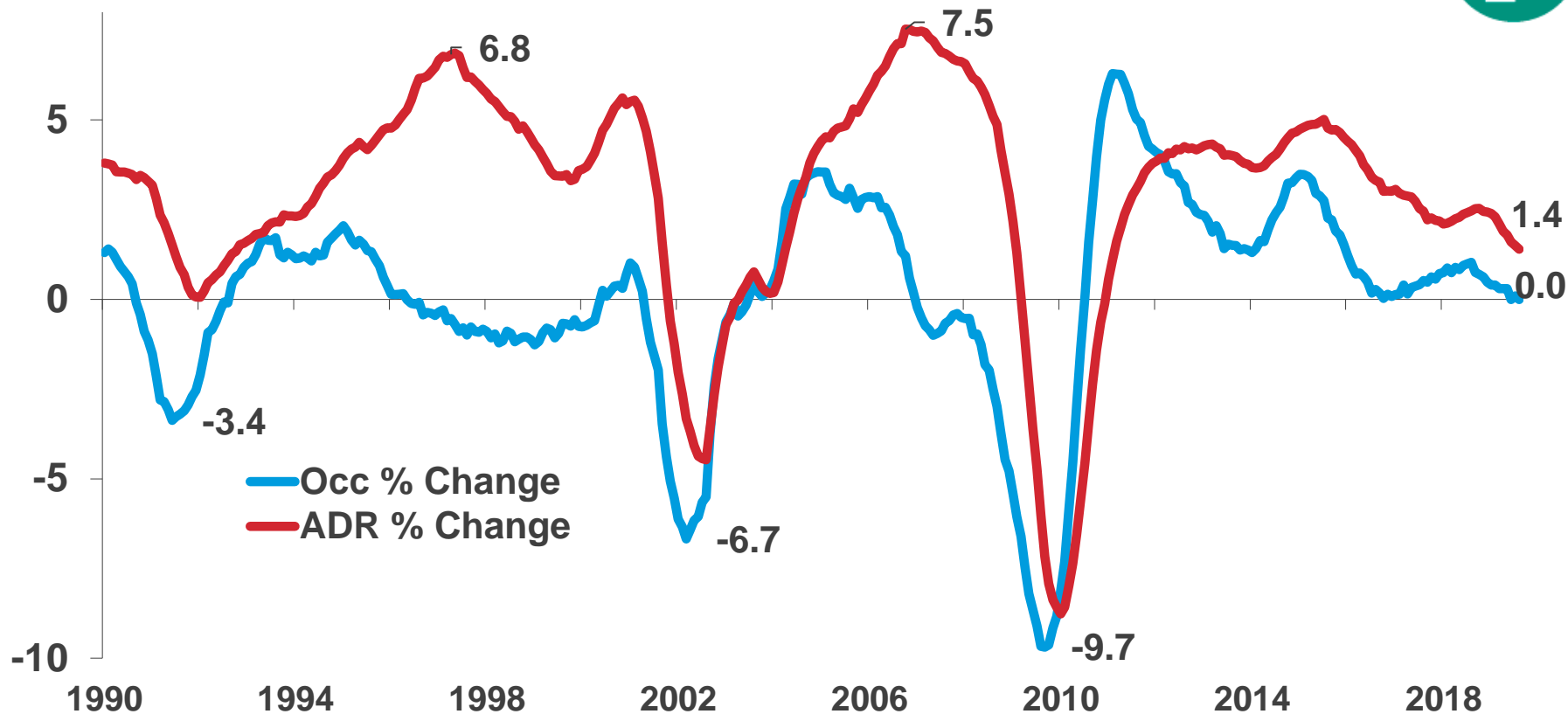
YTD August 2019 RevPAR % Change by Contribution of OCC/ADR % Change (USD), Caribbean Region & Select Countries

## High-end Caribbean resorts push ADR over \$200



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

# It's not just seasonality—things are slowing down for US



Total US, OCC & ADR % Change, 12 MMA 1/1990 – 08/2019



Number of months with positive ADR % change of less than 1%

2011 – 2018

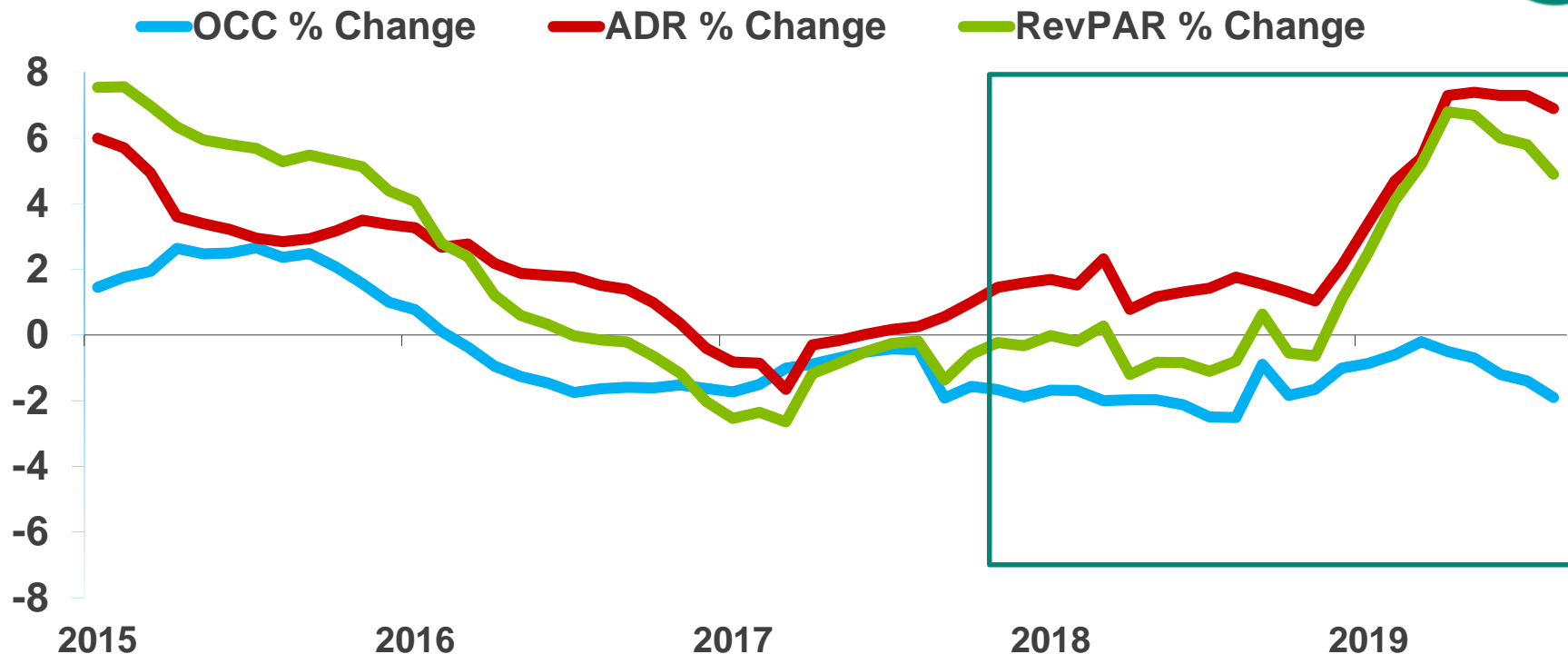
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YTD 2019

6

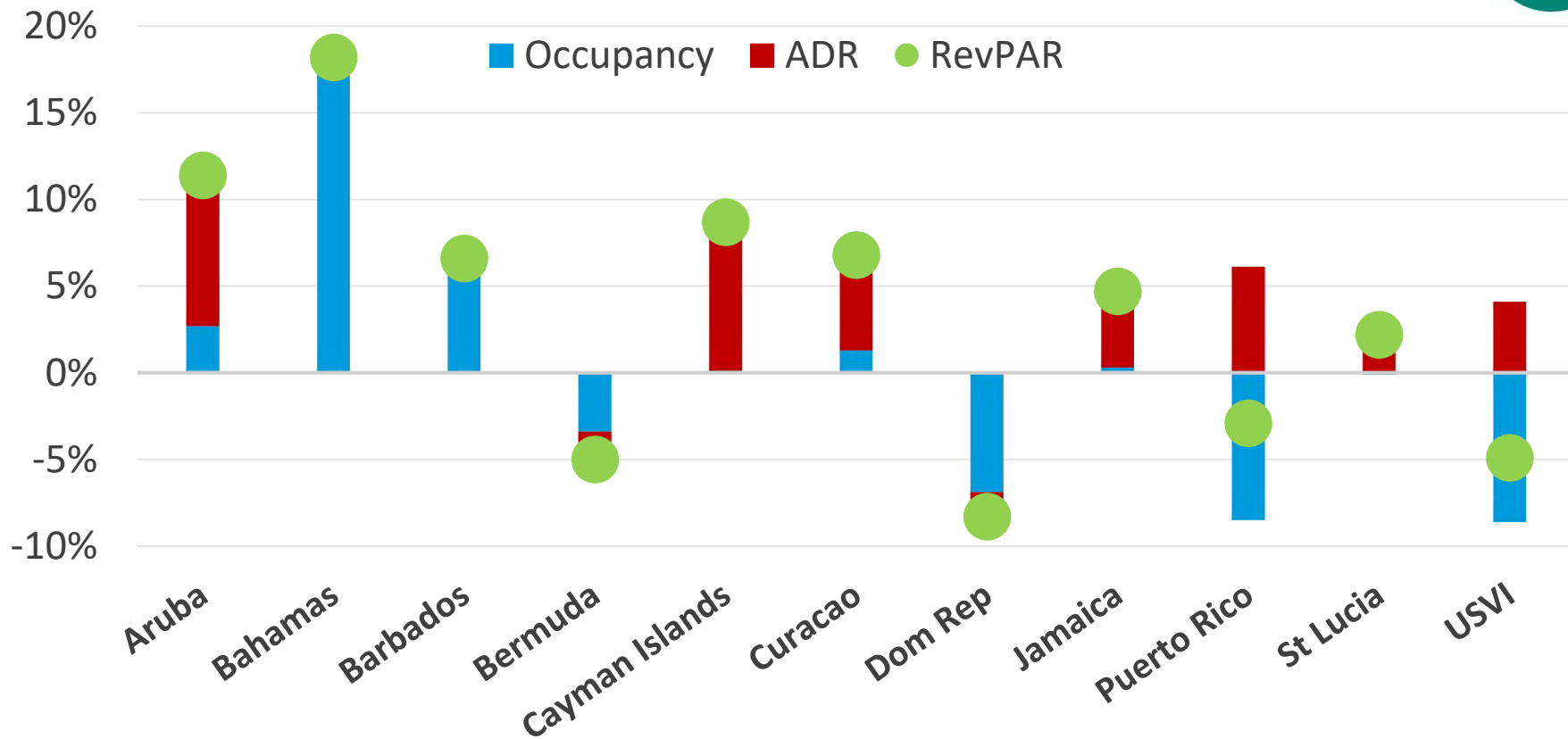


# Upward trends for the Caribbean—were the hurricanes a reset?



Caribbean Region, OCC, ADR & RevPAR % Change, 12 MMA 1/2015 – 08/2019

# One Caribbean, but many different markets with different results

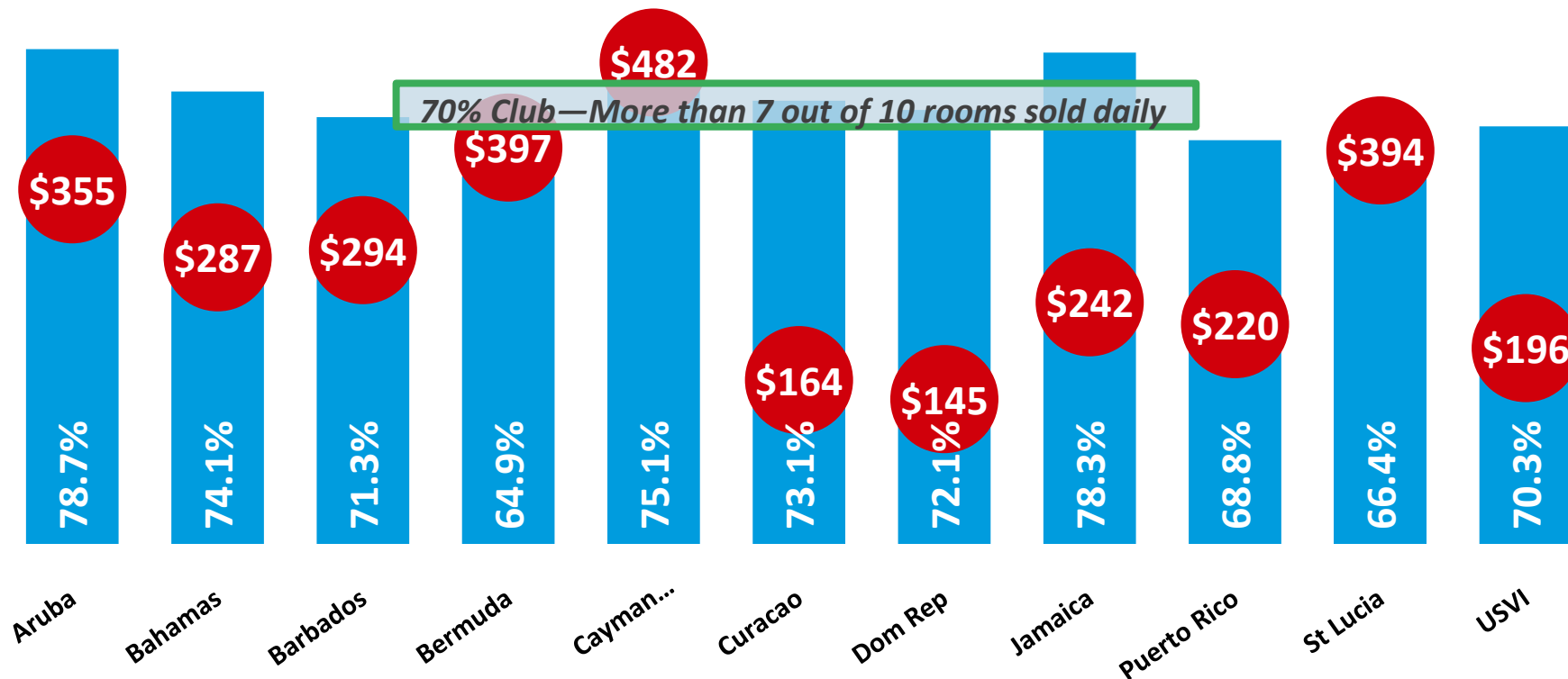


YTD August 2019 RevPAR % Change by Contribution of OCC/ADR % Change (USD), Select Caribbean Markets

# Who is joining in the 70% Club?



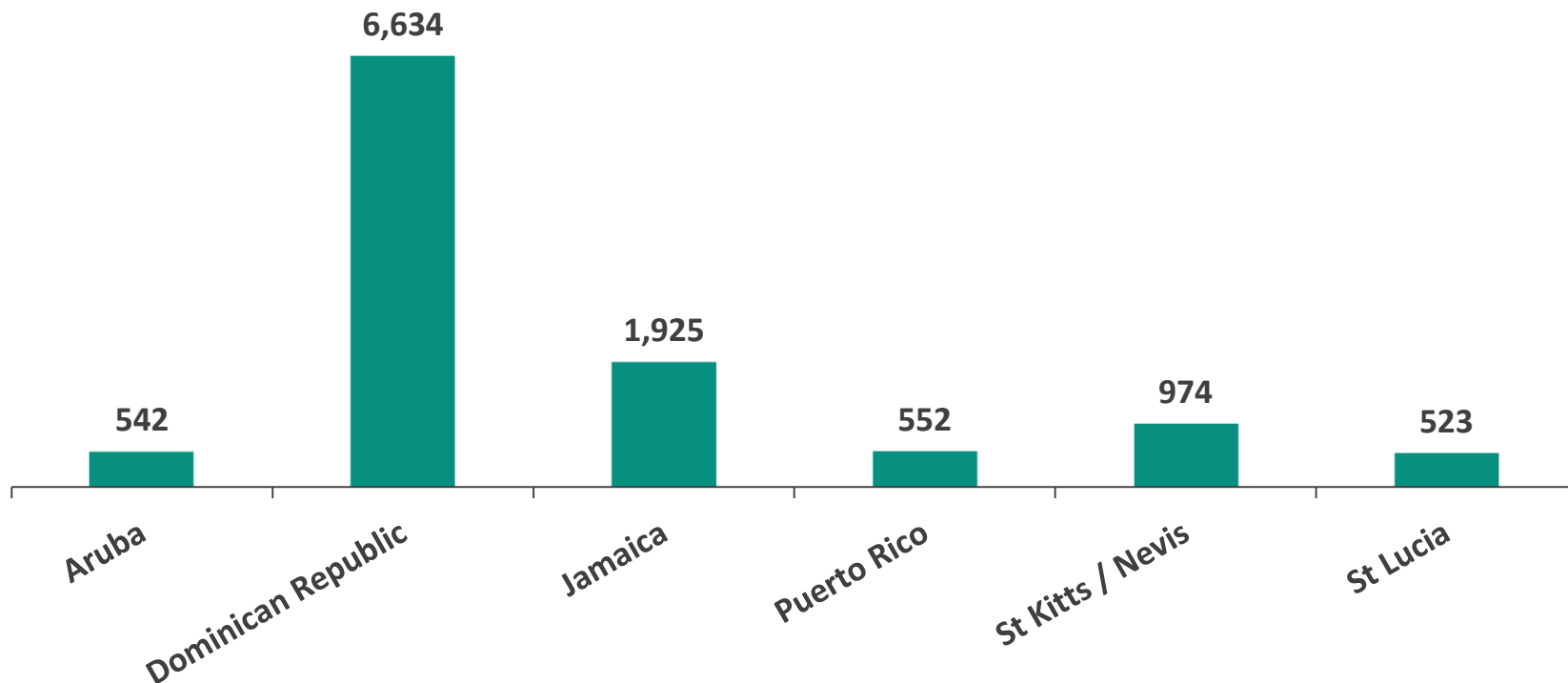
■ Occ ■ ADR



# Pipeline



# Welcome to the Dominican Republic—here's your hardhat



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



# Wellness Trends in the Hotels Industry

*“Will Wellness help improve the health of my hotel’s bottom line?”*



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Innovative Ingredient Technology 2019

The Anatomy of Total Wellbeing

A Guide to the Next Generation of Wellness Programs



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wellness & education

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TRAVEL GUIDE



# Understanding Wellness

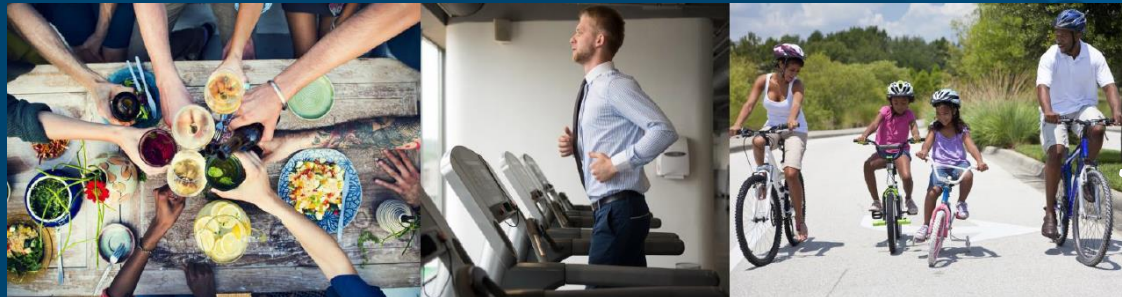
## Wellness Tourism is...

Travel associated with the pursuit of maintaining or enhancing one's personal well-being.



*Wellness is the sole purpose or motivating factor for their trip & destination choice.*

## Primary Wellness Traveler



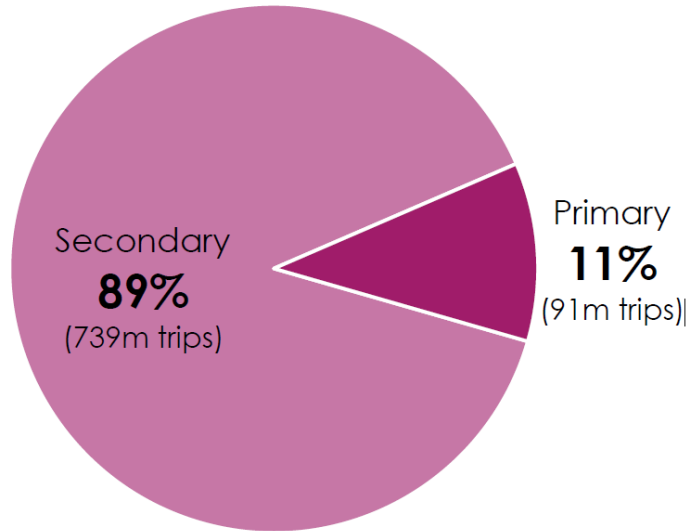
*Seek to maintain wellness while taking any type of trip.*

## Secondary Wellness Traveler

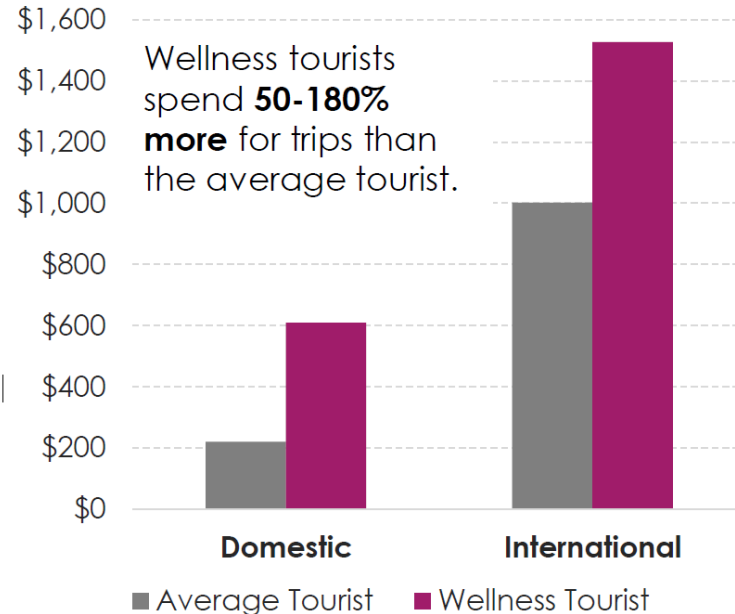
# Understanding Wellness

## Global Wellness Tourists (2017)

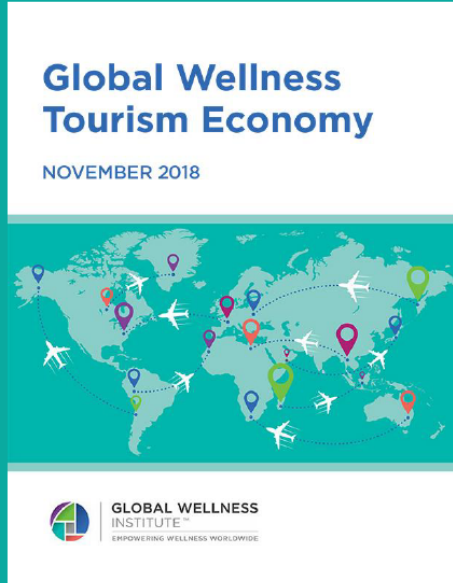
Segmenting Wellness Trips:  
*Primary vs. Secondary*



Average Expenditure Per Trip



Data include both inbound/international and domestic wellness trips. Source: Global Wellness Institute; overall tourism data from Euromonitor



## Global Wellness Tourism Economy

November 2018

Download for free at:

<https://globalwellnessinstitute.org/industry-research/>

# | The world's largest hotel performance sample



Data from

**180** countries



**66,000**

hotel customers  
globally (properties)



**8.9 million**

rooms on the platform



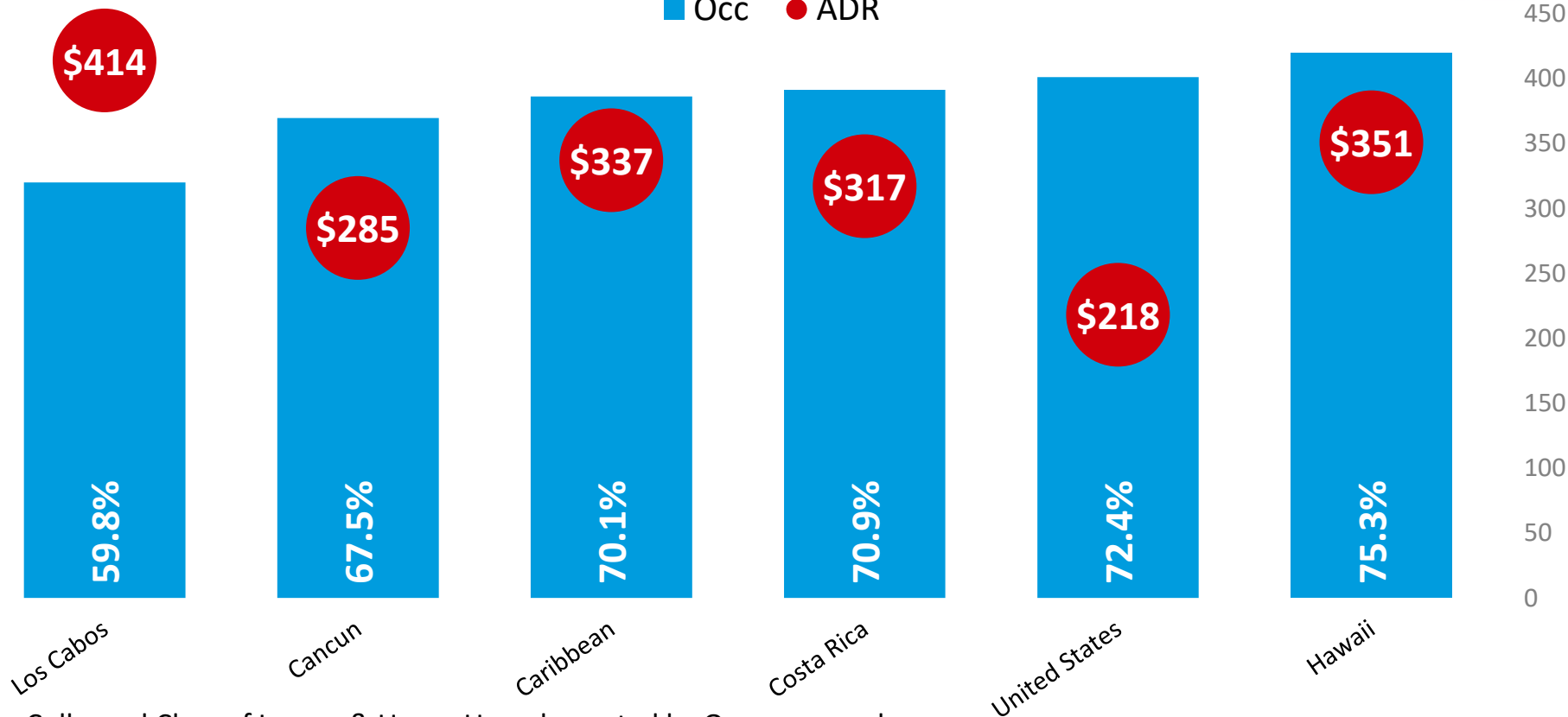
# Data Pull: Full Service Hotels, Collapsed Class of Luxury & Upper Upscale

# Resort Markets, Mexico shows low Occupancy performance

Occupancy & ADR, USD currency, Q2 2019



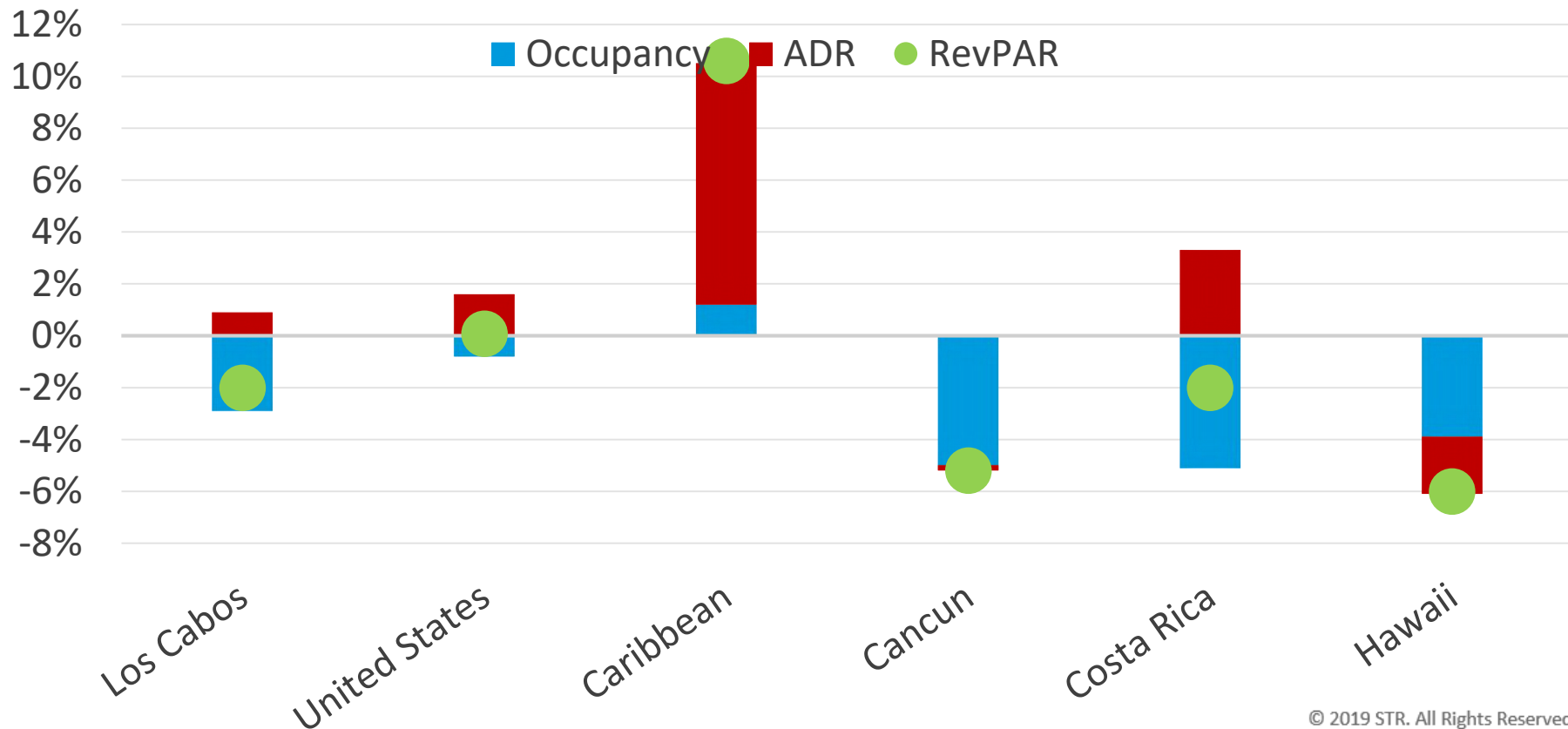
■ Occ ● ADR



Collapsed Class of Luxury & Upper Upscale, sorted by Occupancy value

# Resort Markets, Caribbean on double digit RevPAR growth

KPI % Change, June 2019 YTD vs Same Period LY.





# Benchmark Full Service Hotel Performance, Caribbean & Mexico



# Pulling the Full Service Numbers



- **Caribbean**



- 455 Total properties, 129k rooms

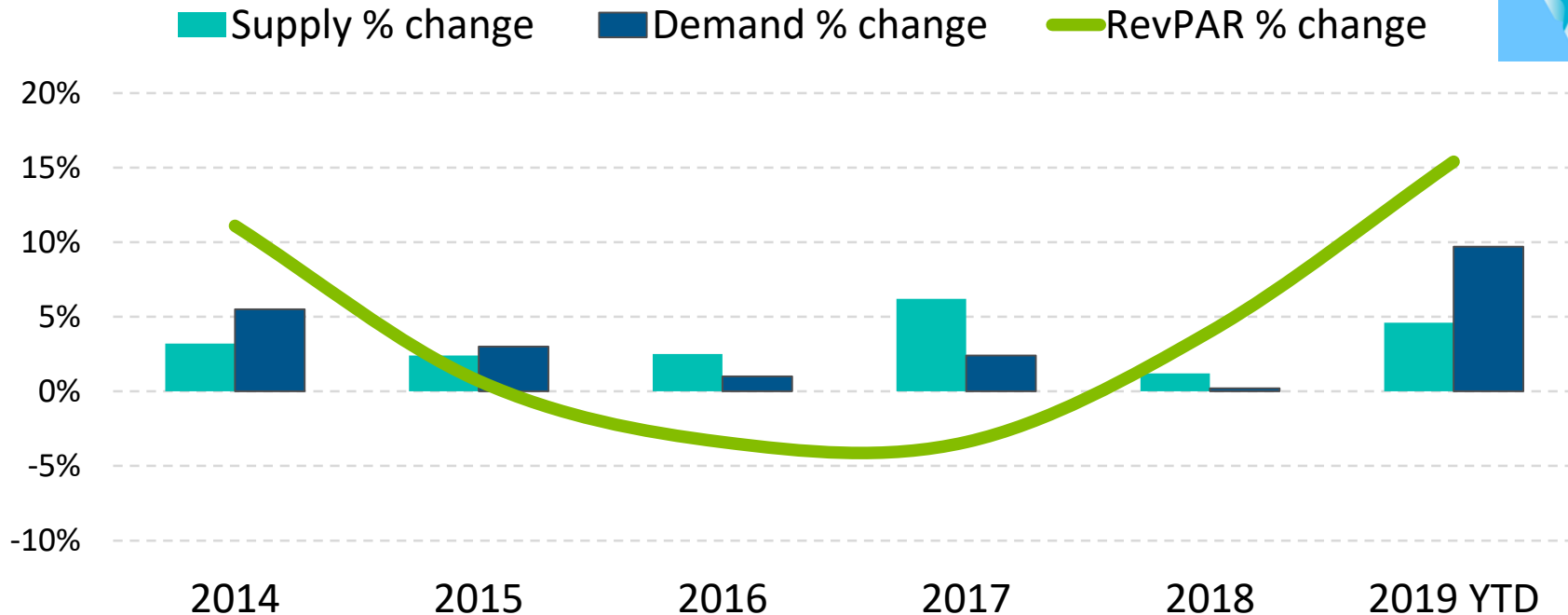
- **Mexico**



- 533 Total properties, 126k rooms

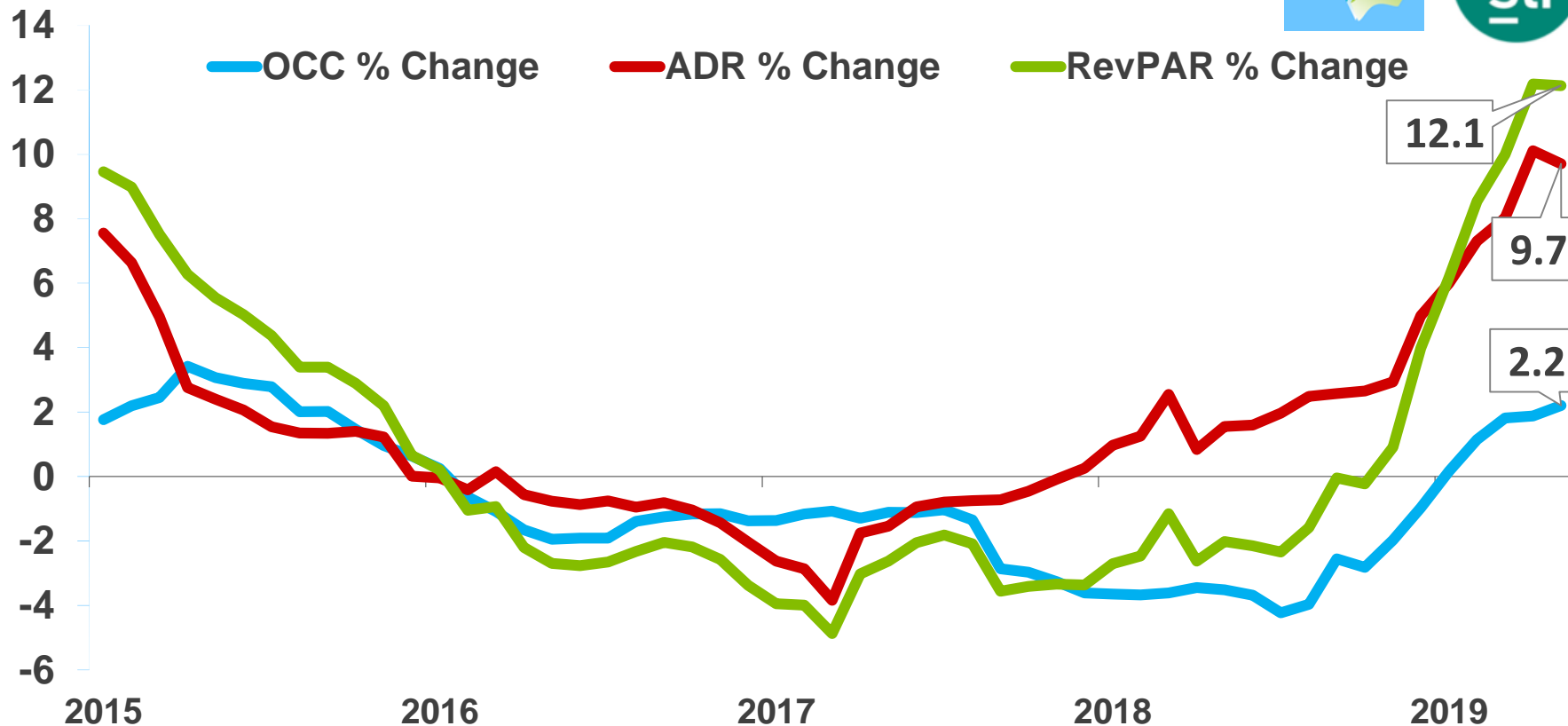
# Rough Years left Behind? Demand back to Healthy

Caribbean Full-Service Hotels – Supply, Demand, RevPAR % Change,



Luxury & Upper Upscale Classes

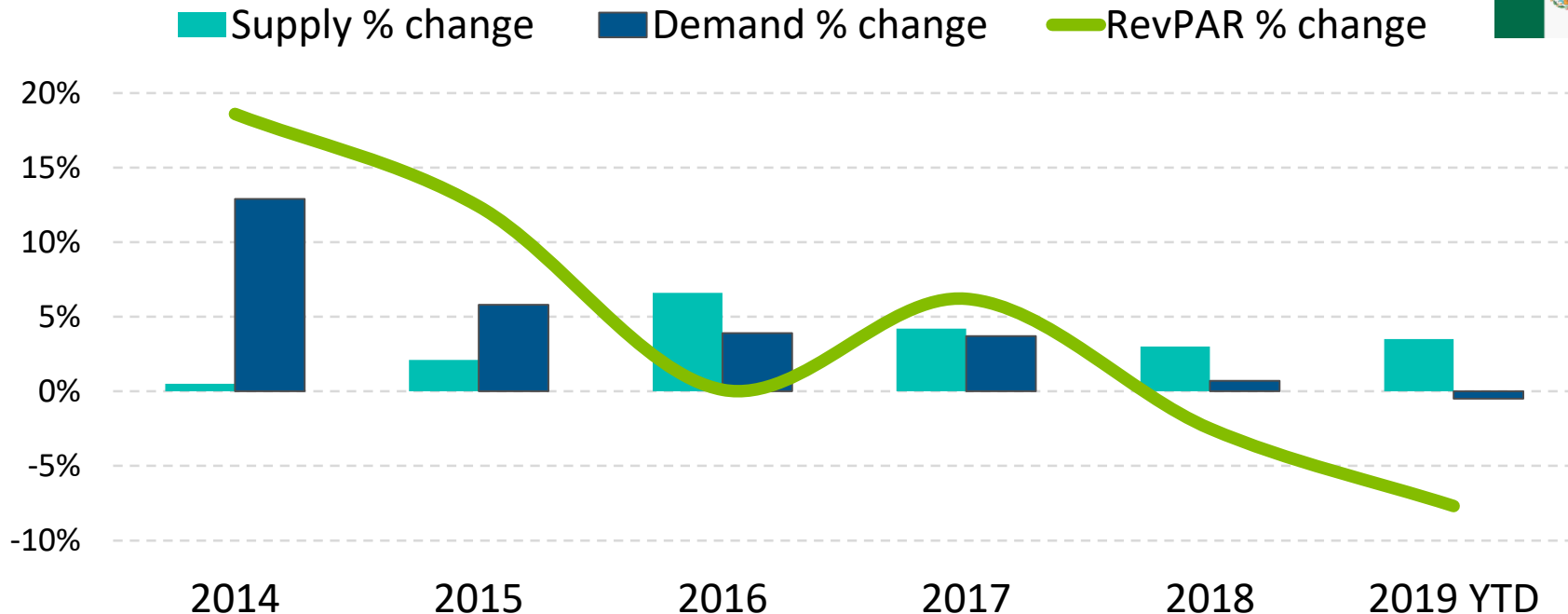
## Caribbean Full-Service Hotels pushing Rate



Luxury & Upper Upscale Classes, KPIs % Change, 12 MMA 1/2015 – 06/2019

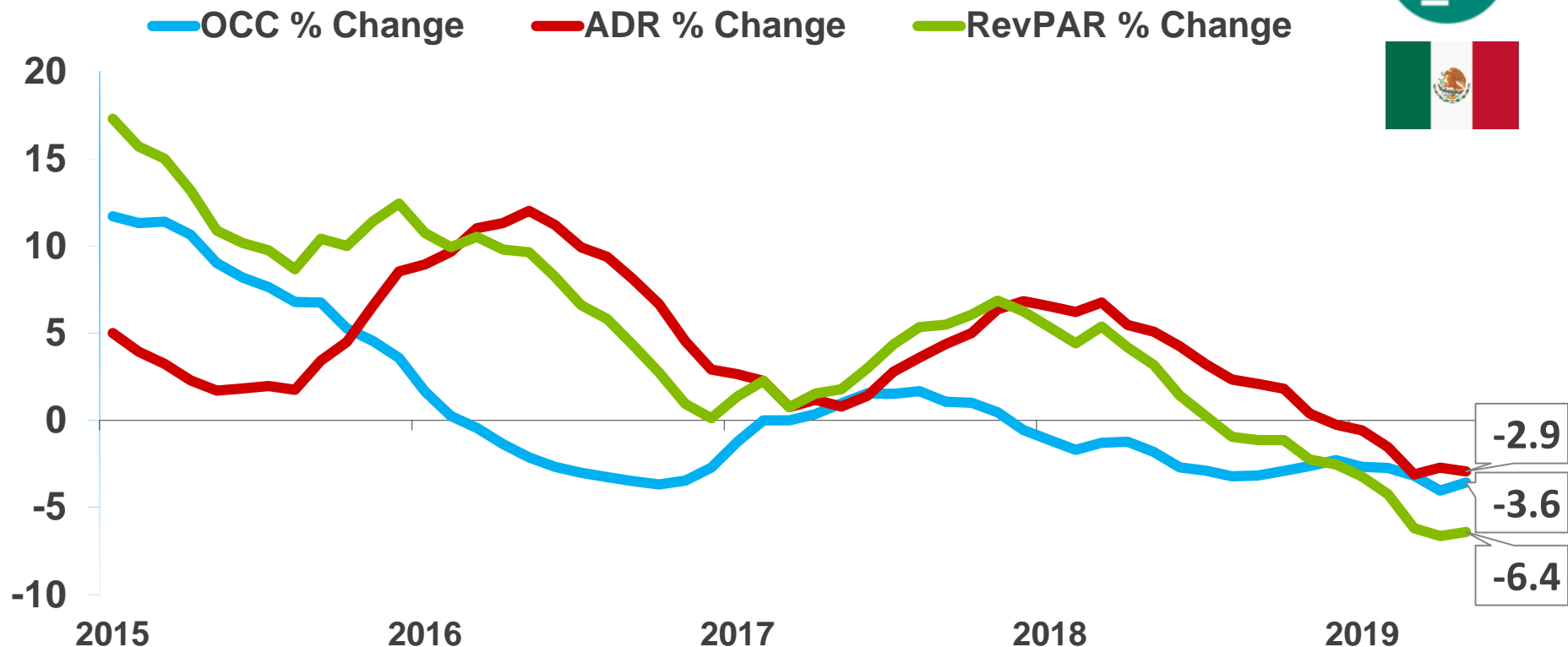
# Demand in Decline since 2015 with Constant Supply Growth

Mexico Full-Service Hotels – Supply, Demand, RevPAR % Change,



Constant Currency, USD, Luxury & Upper Upscale Classes

# Tough Times too for Full-Service Hotels in Mexico



Luxury & Upper Upscale Classes, KPIs % Change, 12 MMA 1/2015 – 06/2019

# Caribbean & Mexico Full-Service Pipeline



Phase	Projects	Number of rooms
In Construction	18	5,523
Final Planning	15	3,392
Planning	12	1,677
<b>Active Pipeline</b>	<b>45</b>	<b>10,592</b>



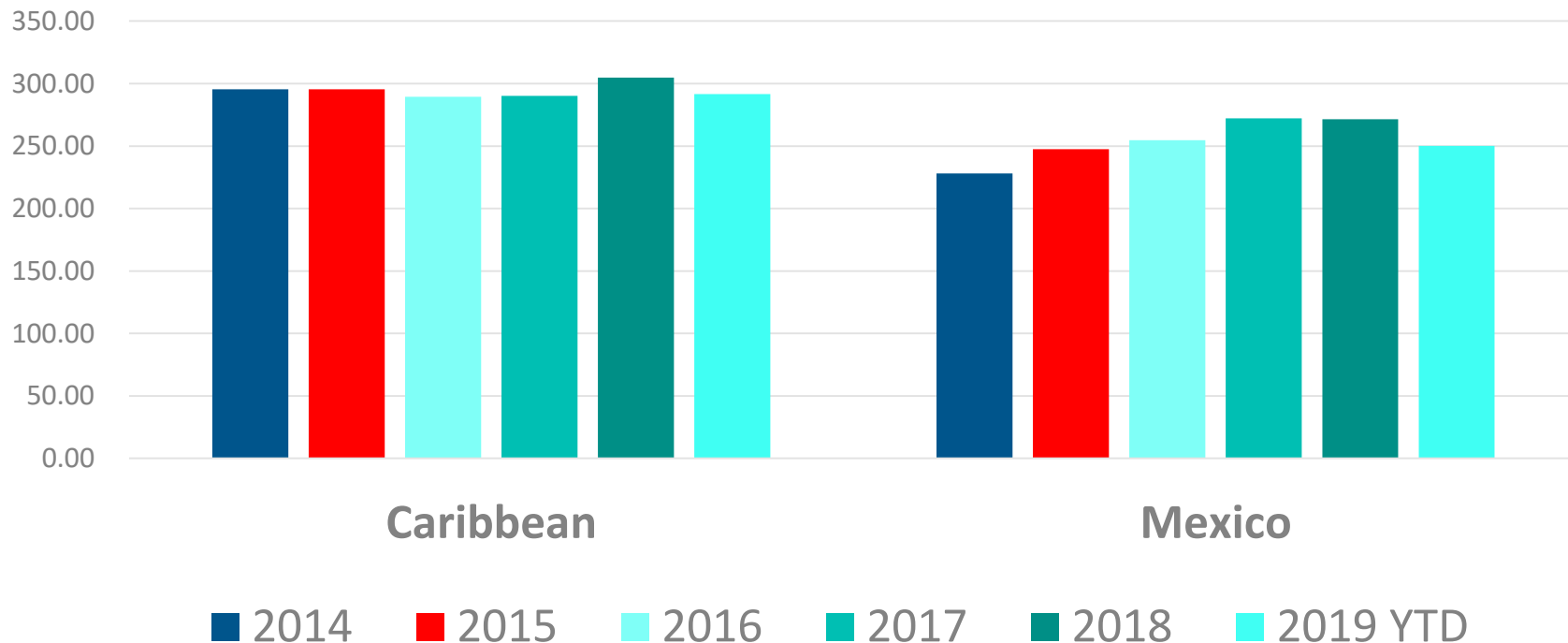
Phase	Projects	Number of rooms
In Construction	29	7,249
Final Planning	12	2,160
Planning	17	2,510
<b>Active Pipeline</b>	<b>58</b>	<b>11,919</b>

Pipeline by Phase, May 2019—Luxury & Upper Upscale

# Similar ADR but different Trending



Caribbean and Mexico Year End Results, ADR in US \$.



*Luxury & Upper Upscale Classes*



# Key Takeaways:

Know Your Job & Product,  
**“You are the Expert”, sell the experience**

Innovate within the Standard,  
**“Trend-Setting” can have a big pay-off**

Differentiation from Others  
**“Stand Out, Go Beyond” every opportunity possible**

Cross Pollinate with Other Teams  
**“Your Pool Staff Could be Your Best PR”**





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