



# State of the Lodging InduSTRy

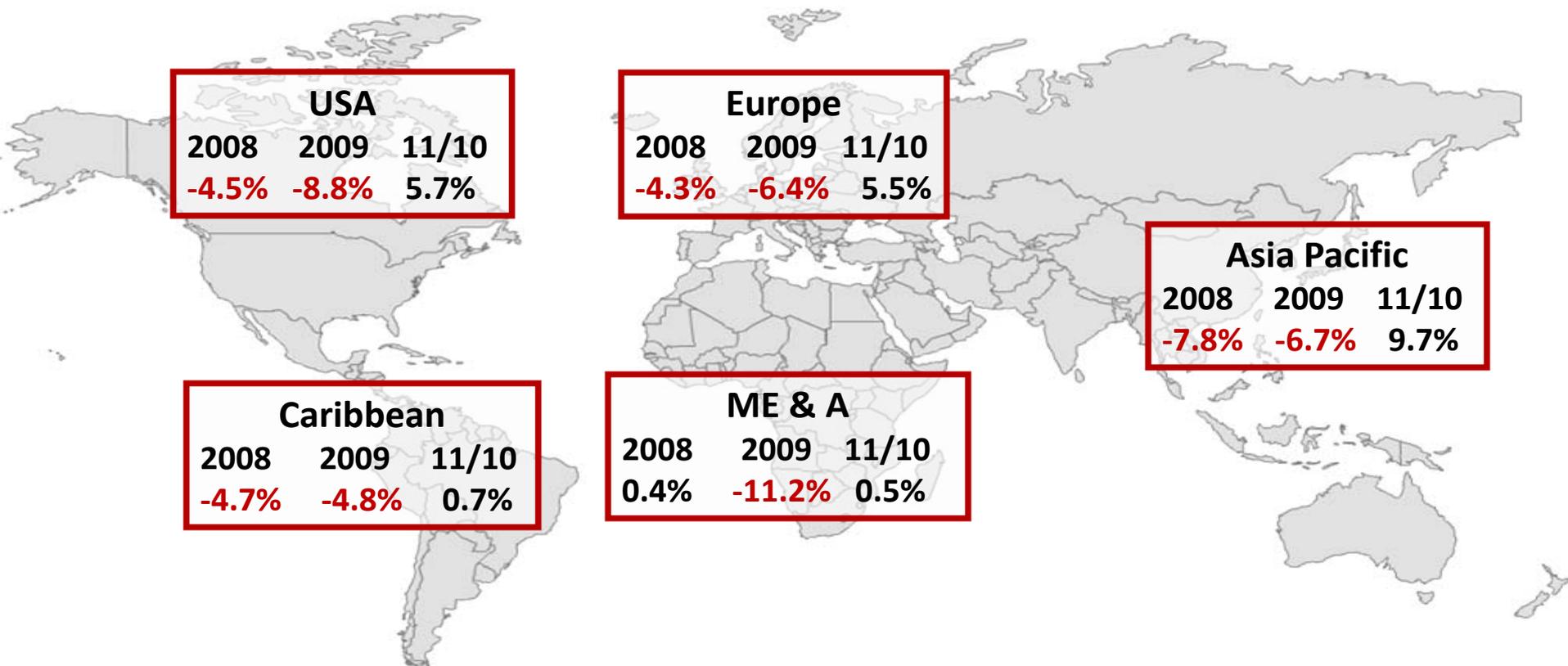
Brittany Baldwin, Sales Executive  
Caribbean Marketplace – January 2011



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# Asia Pac Leading Global Occupancy Growth



\* Global Occupancy % Change, YE '08, YE'09, YTD November '10

2010 STR Global Limited

# US Hoteliers Continue To Feel Discounting Impact.



USA \$		
2008	2009	11/10
2.4%	-8.8%	-0.2%



Europe €		
2008	2009	11/10
-1.8%	-10.9%	4.3%



Asia Pacific \$		
2008	2009	11/10
9.9%	-13.8%	11.1%



Caribbean \$		
2008	2009	11/10
-10.2%	-13.5%	2.9%



ME & A \$		
2008	2009	11/10
15.5%	-2.3%	2.7%

\* Global ADR % Change, YE '08, YE'09, YTD November '10

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# Caribbean Hotel Industry - Key Statistics

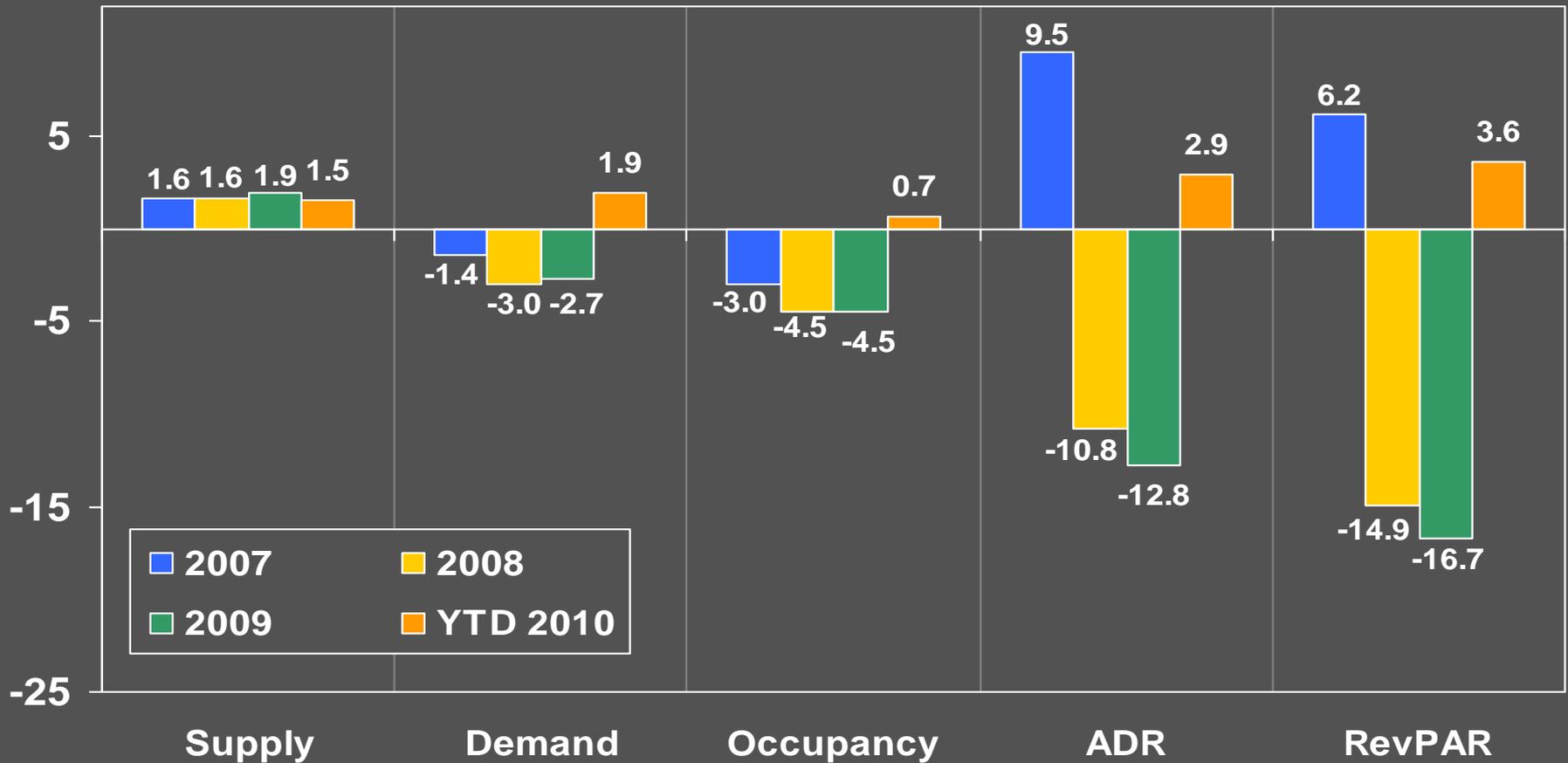
## YTD November 2010

		<u>% Change</u>
• # of Hotels	2,278	
• Hotel Rooms	243,278	0.7%
• Occupancy	61.4%	2.9%
• Average Daily Rate	\$157.30	3.6%
• RevPAR	\$96.59	4.1%
• Room Revenue	\$ 7.8B	4.3%

2010 Smith Travel Research, Inc.

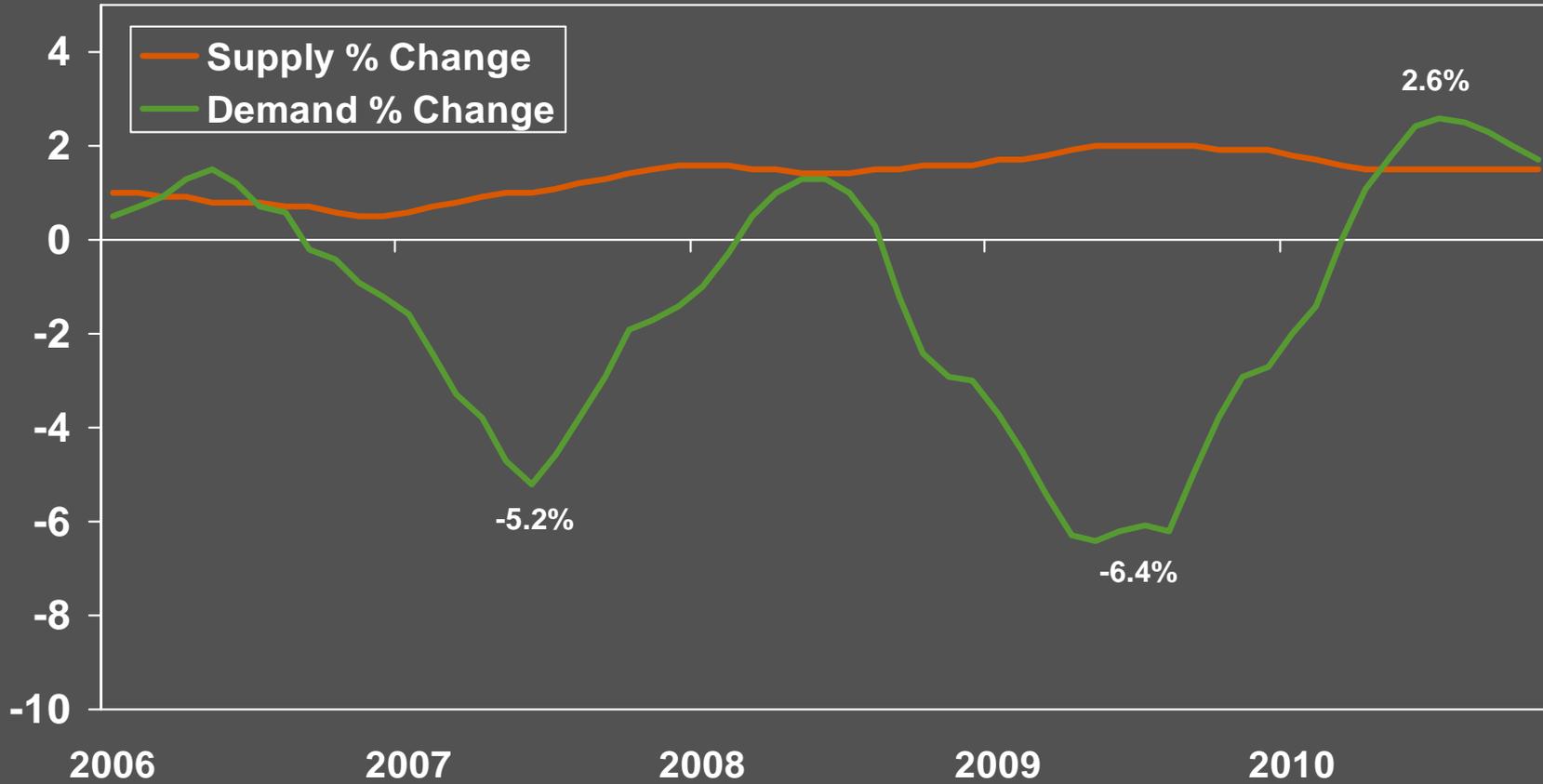


# Will The Caribbean See Improvement in 2011?



Total Caribbean  
% Change 2007 - 2009 and November 2010 YTD

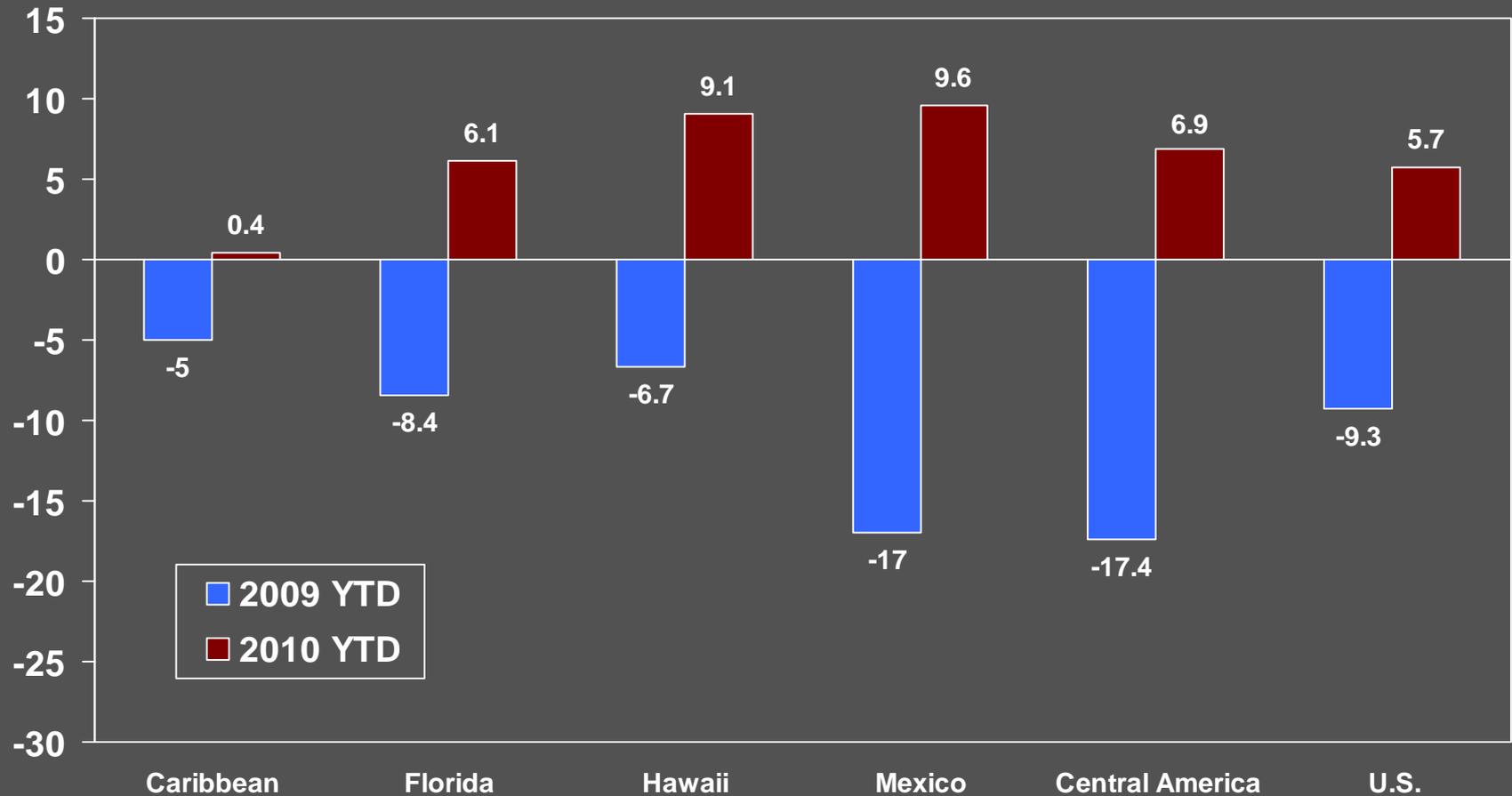
# Demand Finally On The Rebound



Total Caribbean

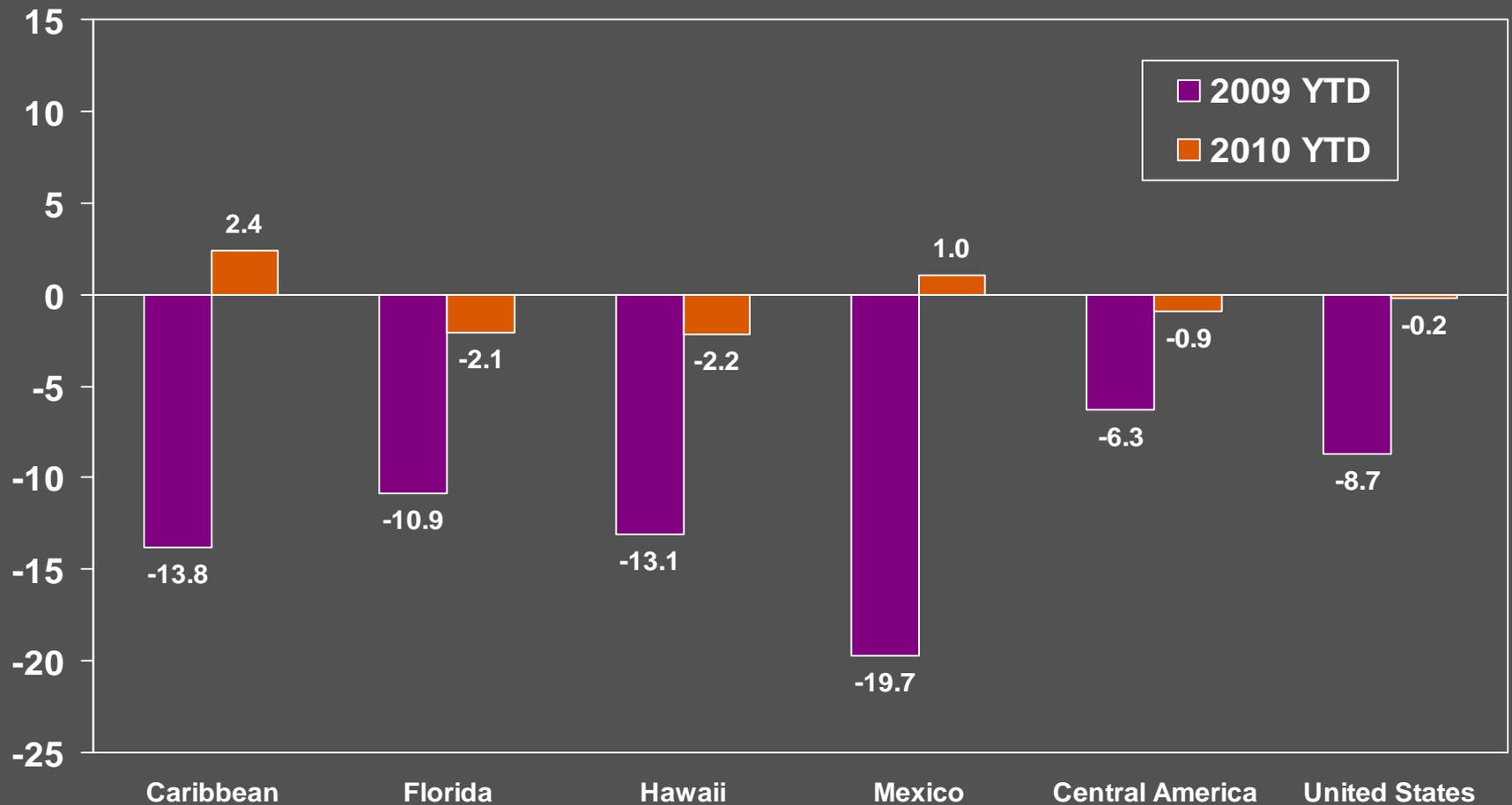
Twelve Month Moving Average % Change – 2006 to November 2010

# Slight Occupancy Growth For The Caribbean



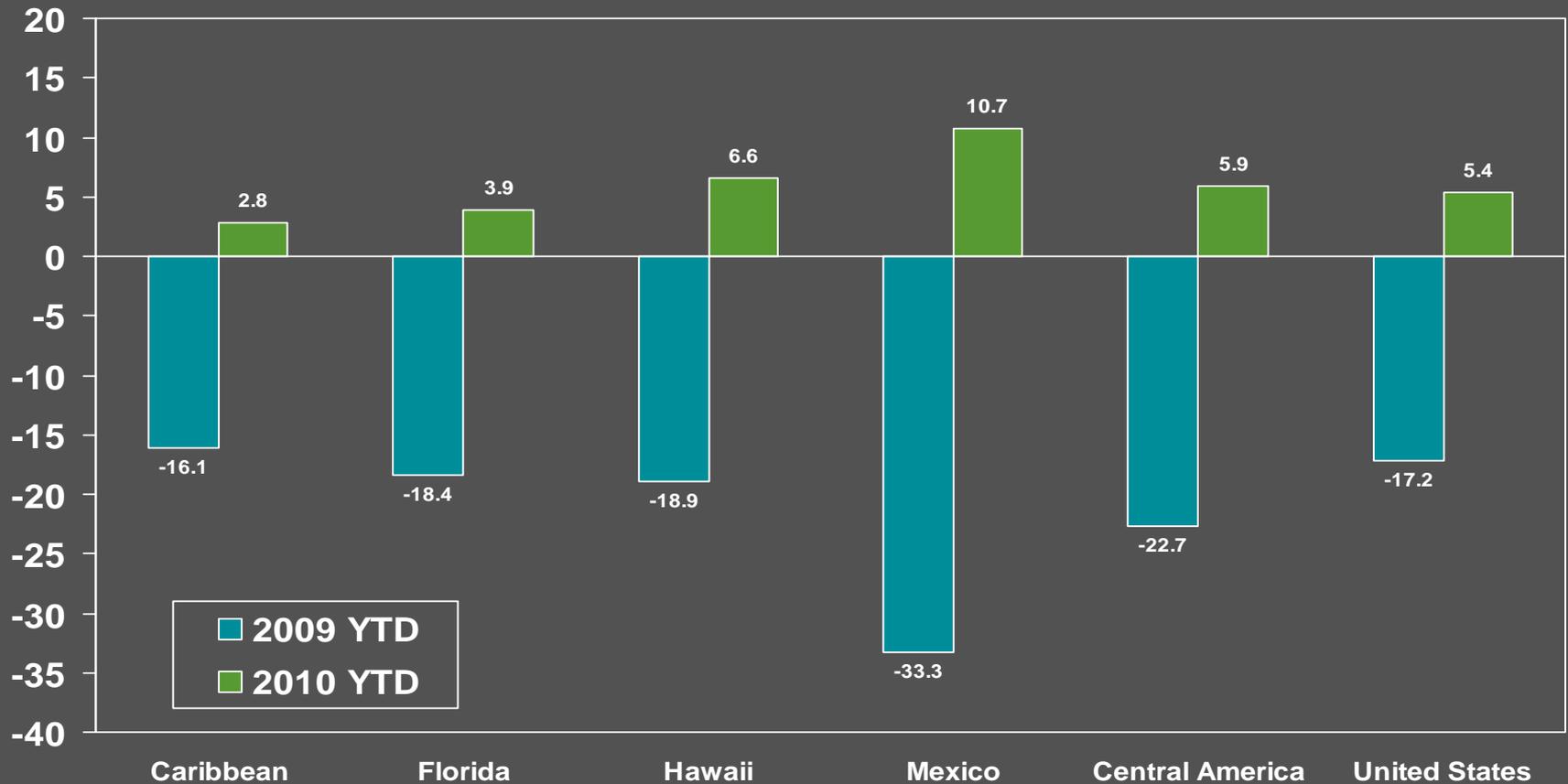
Select Destinations- Occupancy % Change  
November 2010 YTD vs. November 2009 YTD

# ADR Improvement Still Sluggish



Select Destinations- ADR % Change  
November 2010 YTD vs. November 2009 YTD

# Recovering From Largest RevPAR Declines in STR History



Select Destinations- RevPAR % Change  
November 2010 YTD vs. November 2009 YTD



# Caribbean Pipeline



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# Total Caribbean Active Development Pipeline

Phase	Projects (November 2010)	Projects (November 2009)
In Construction	26	24
Final Planning	10	8
Planning	10	3
<b>Active Pipeline</b>	<b>46</b>	<b>35</b>
Pre-Planning	13	24
<b>Total</b>	<b>59</b>	<b>59</b>



# Participation/ Program Overview



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# Participation Overview

As of Nov 2010	United States	CARIBBEAN
Properties	51,350	2278
Rooms	4,817,769	243,278
Rm Sample % 2010	70%	23%
Rm Sample % 2009 (Nov 2009)	70%	22%

- Caribbean sample only seeing slight growth. Need your help!

# Why Participate?

- Benchmark property performance to competitors
- Allows you to keep an eye on your market
- Lends perspective to good and bad performance
- Aids pricing decisions
- Allows you to monitor the effect of your business strategies
- Aggregated market data

# Association Benefits:

- Aggregated market data = better business & budgeting decisions
- CHTA Data Center
- Monthly Trends for assisting associations
- Ask for more details on getting involved.

“Thank you” to USVI & Bermuda for recently signing partnership agreements!

# How Can Hotels Get Involved?

- Participation is easy
- Less than 5 minutes a month to submit the data via our secure website – [www.str.com](http://www.str.com)
- Report delivered via email in Excel format
- Individual data is kept confidential
- Stop by marketplace booth on the selling floor or contact STR to obtain more information



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**VAT increase**  
 Hotel industry executives believe that the VAT rate increase could hamper the country's competitiveness, but global brands are well placed to handle the change.

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## Chicago's recovery to continue in 2011

The recovery seen in Chicago during 2010 will extend into 2011 as supply continues to stall.



Baird/STR Hotel STOCK INDEX  
  
 2351.56



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- US luxury hotel performance leading the charge

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### Lending—with careful underwriting—is back

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### Experience matters when plotting your career

Andrew Lo - 05 January 2011  
 Trying your hand in different departments can help you hone in on your true passion.





## For More Information

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Presentation available on [www.hotelnewsnow.com](http://www.hotelnewsnow.com)



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