



Lodging Industry Overview

Vail R. Brown

Vice President of Global Sales & Marketing

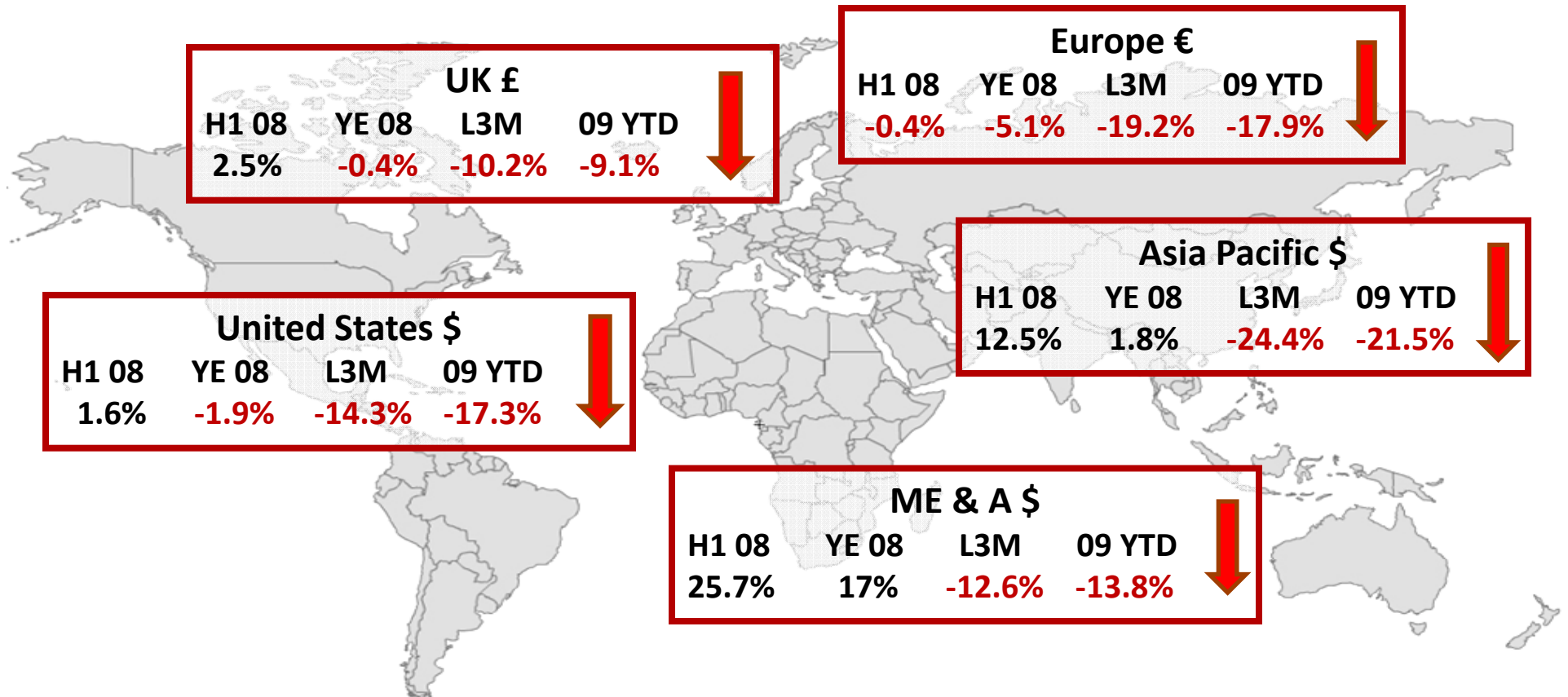


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Global RevPAR

% Change



Note: L3M = December 08 to February 09; 09 YTD = through November 09

Source: 2010 STR Global Ltd.



Caribbean Lodging Industry - Key Statistics

YTD November 2009

% Change

• # of Hotels	2,265	
• Hotel Rooms	240,421	0.9%
• Occupancy	61.8%	- 4.5%
• Average Daily Rate	\$152.58	- 14.6%
• RevPAR	\$94.25	- 18.4%
• Room Revenue	\$7.6 BB	- 17.7%

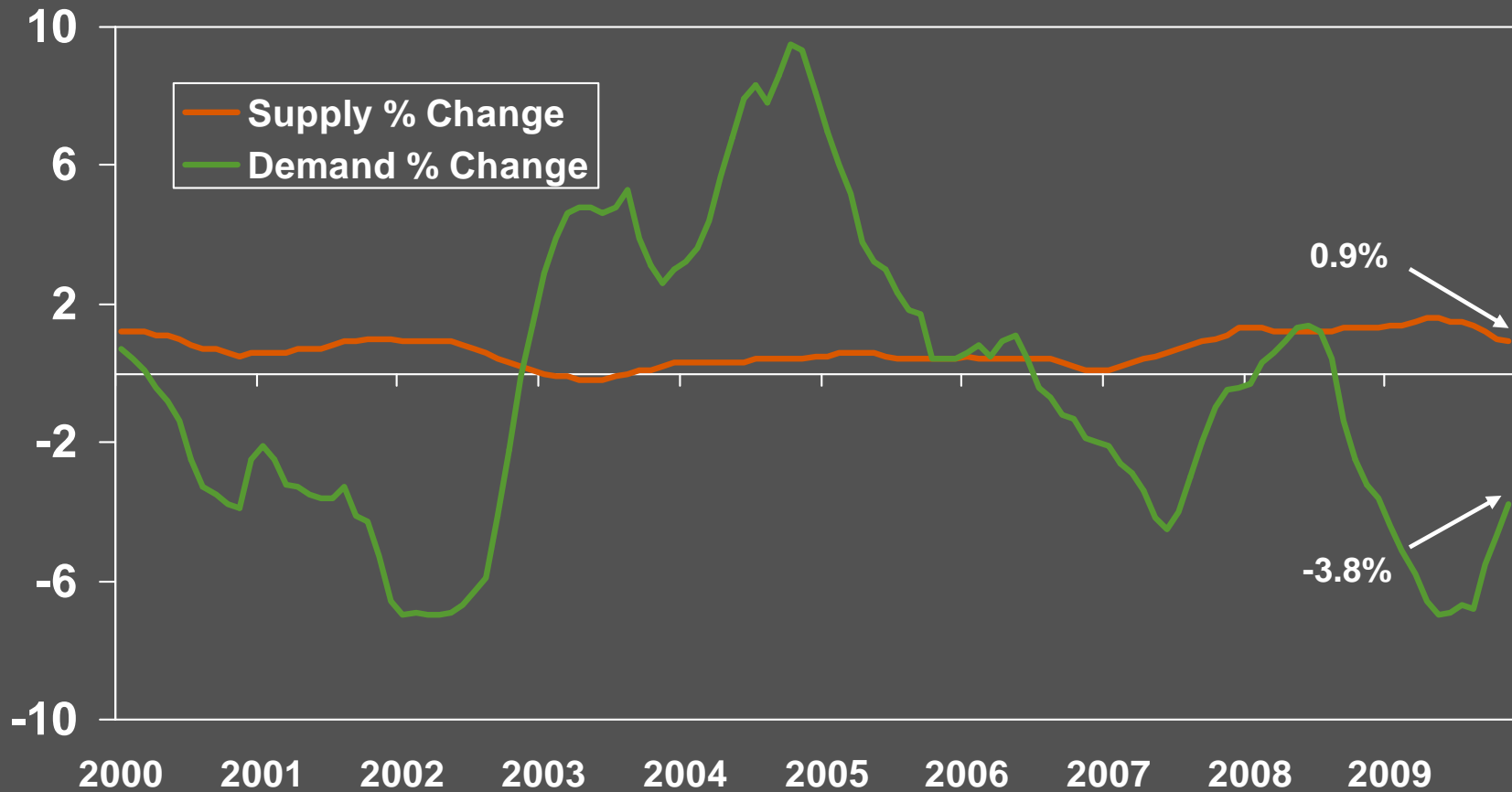
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Total Caribbean

Room Supply/Demand Percent Change

Twelve Month Moving Average – 2000 to November 2009



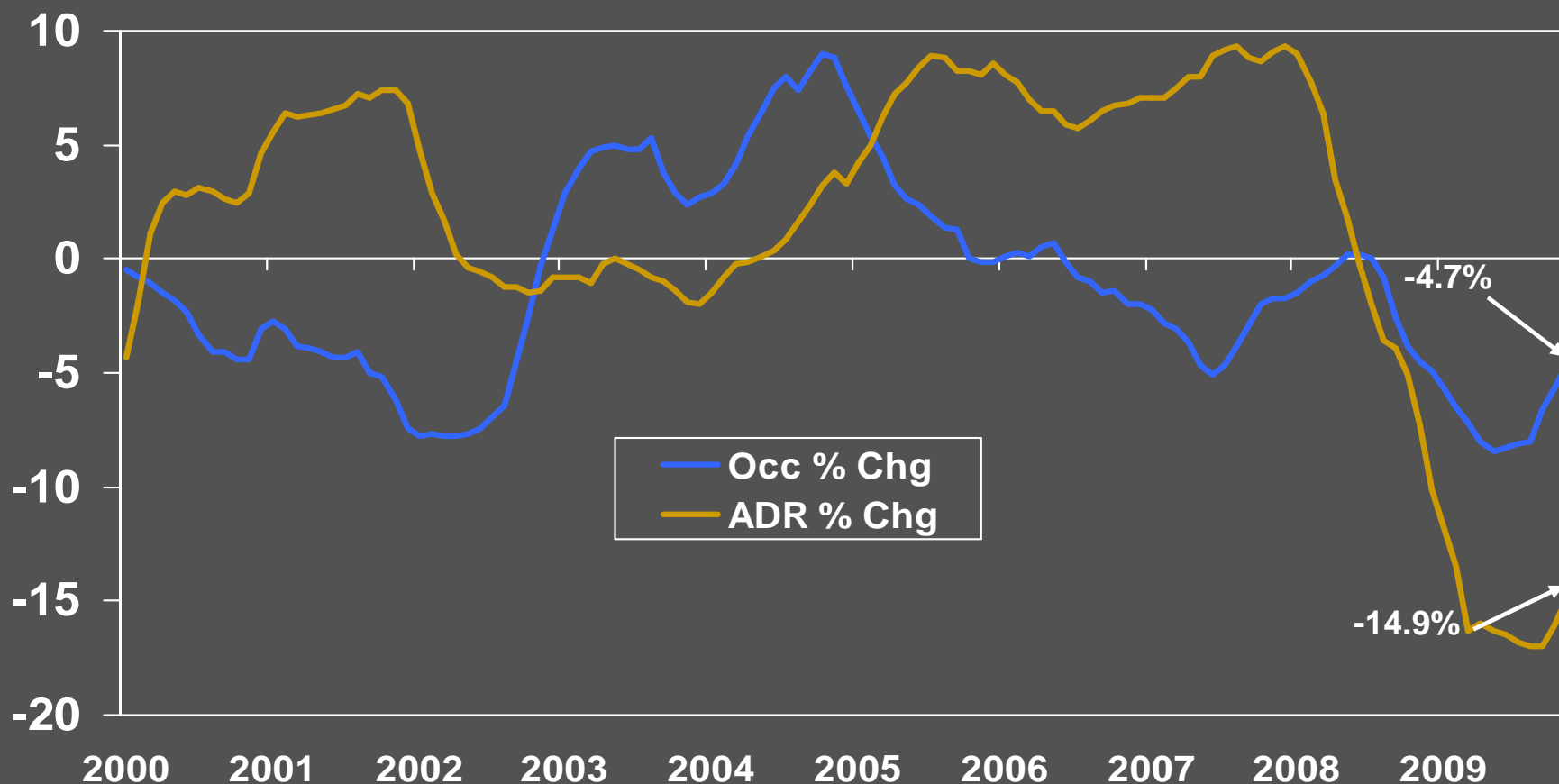
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Total Caribbean

Occupancy/ADR Percent Change

Twelve Month Moving Average – 2000 to November 2009

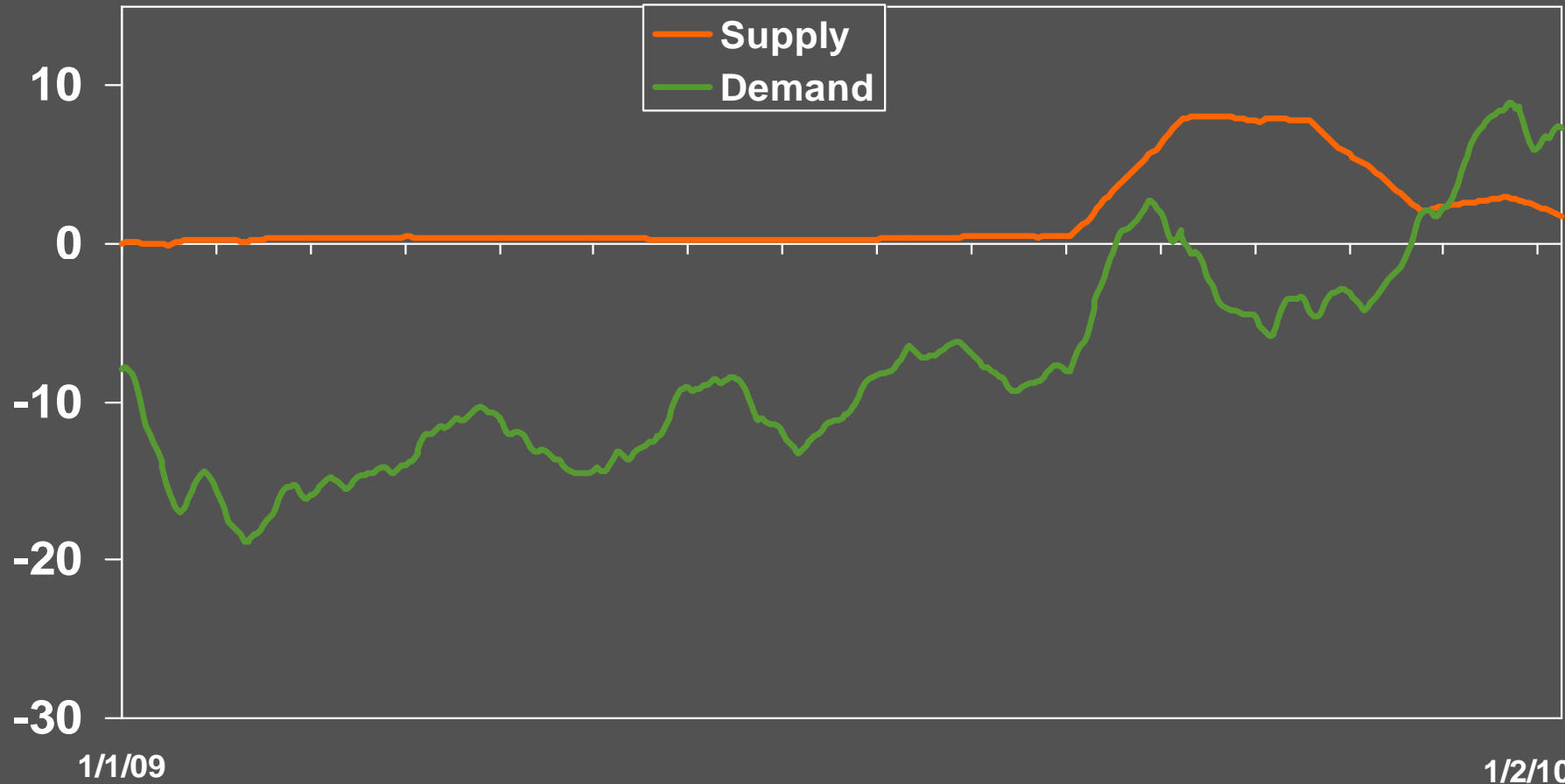


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Total Caribbean

28 Day Moving Average – Rm Supply/Demand Percent Change
Jan. 1, 2009 – Jan. 2, 2010

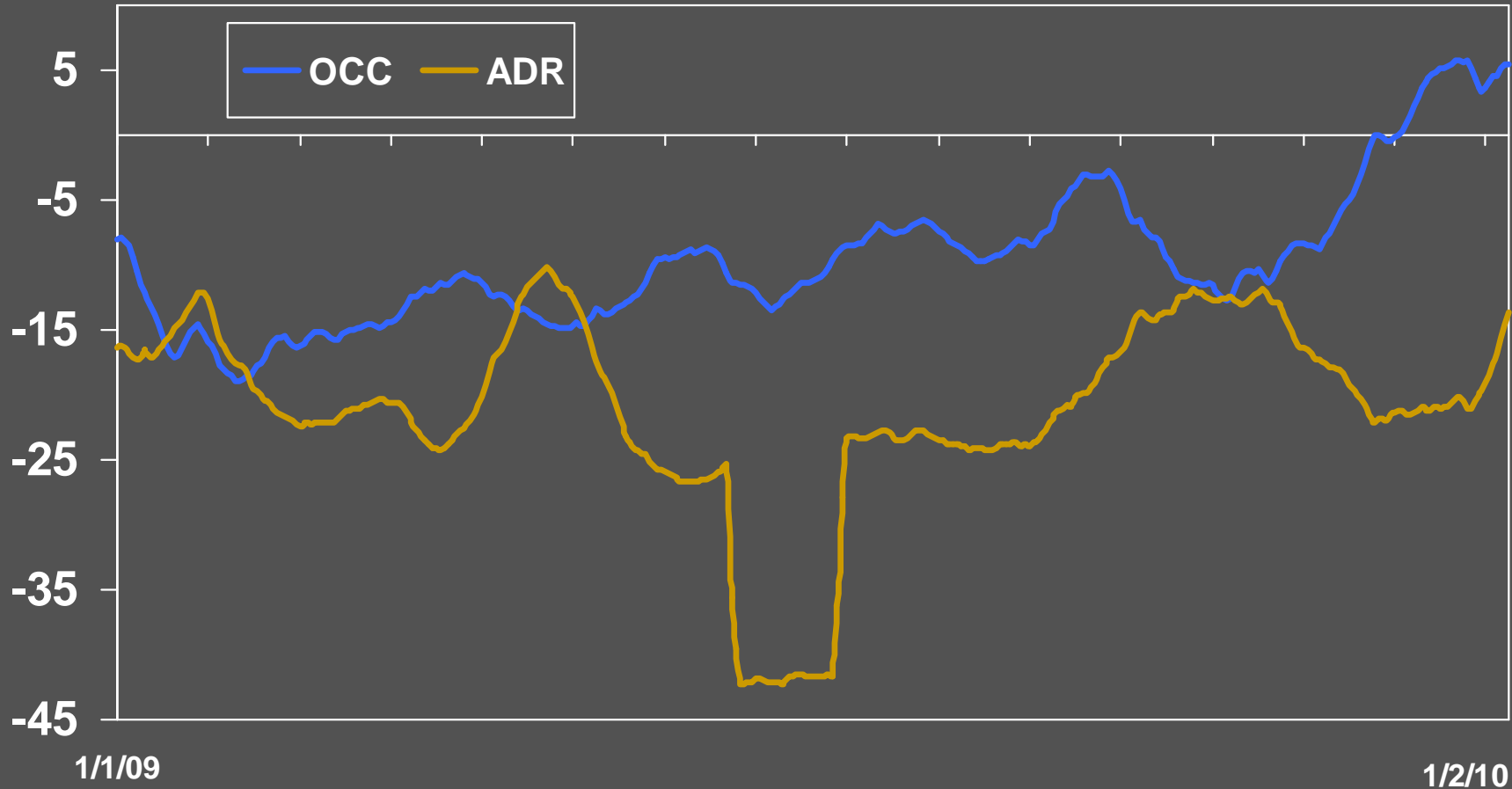


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Total Caribbean

28 Day Moving Average – OCC/ADR Percent Change
Jan.1, 2009 – Jan. 2, 2010

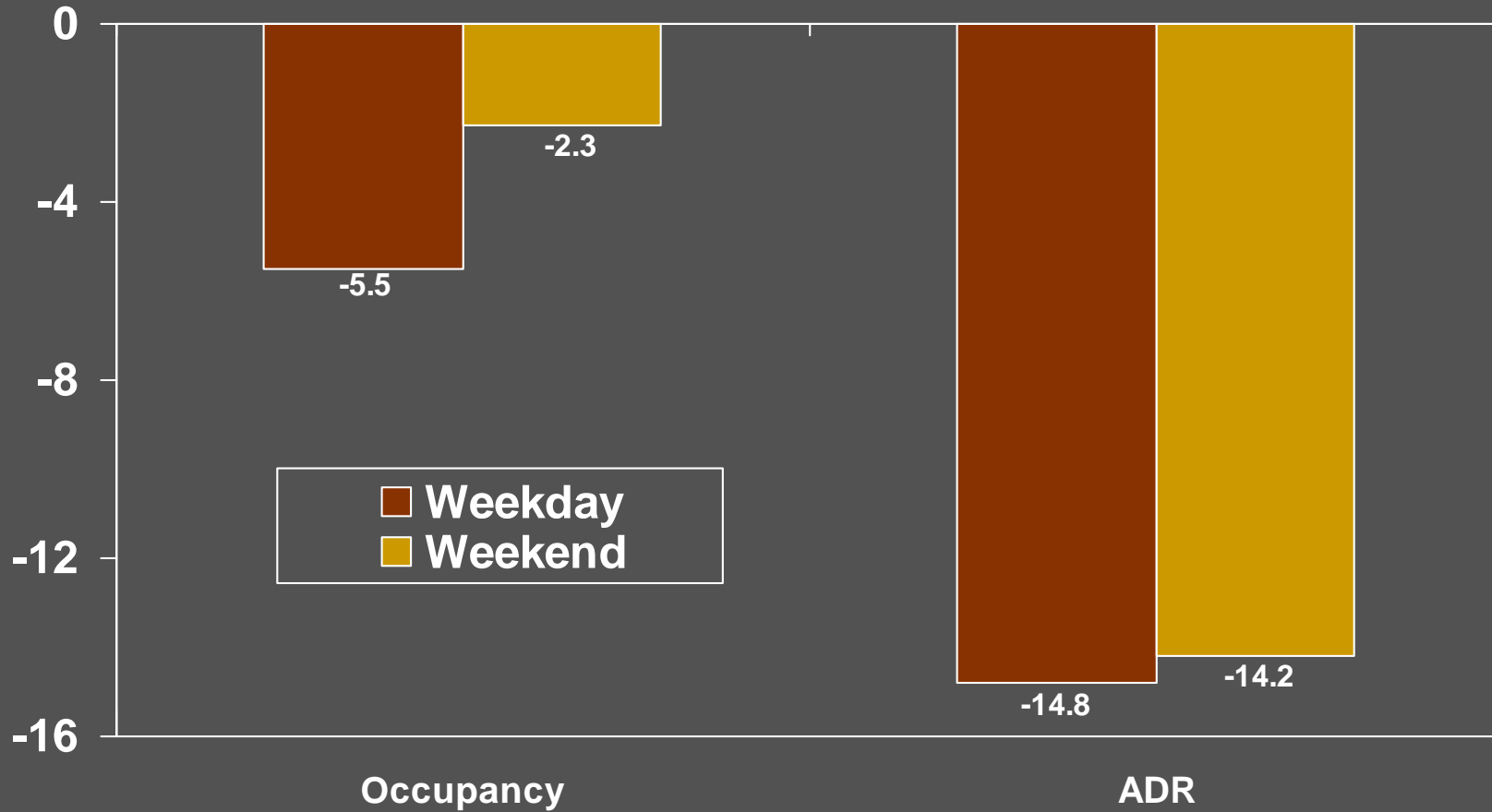


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Total Caribbean

Weekday / Weekend – OCC/ADR Percent (%) Change
YTD ending November 2009



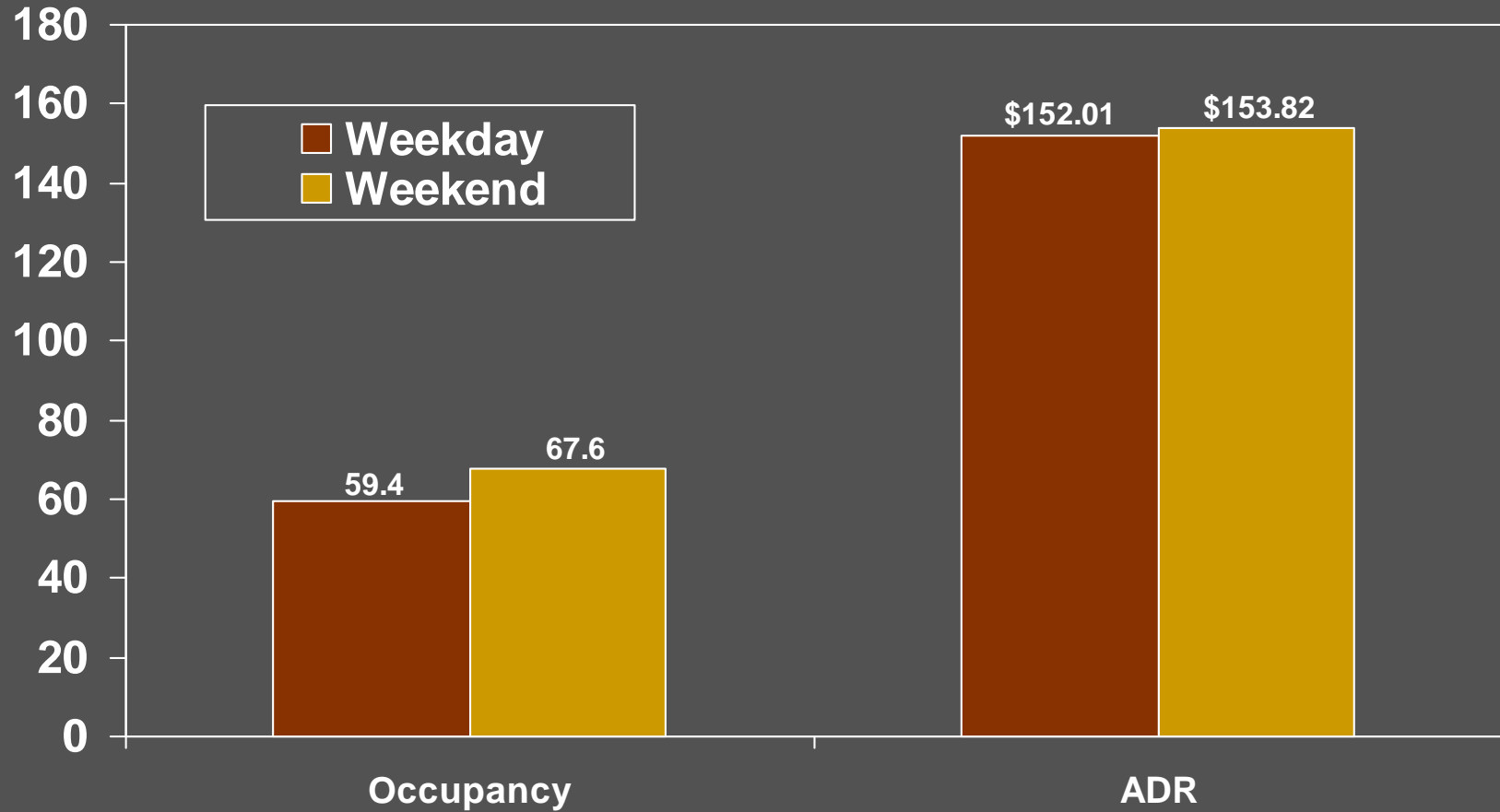
Weekday – Sunday thru Thursday
Weekend – Friday and Saturday

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Total Caribbean

Weekday / Weekend – OCC/ADR Actual Performance
YTD ending November 2009



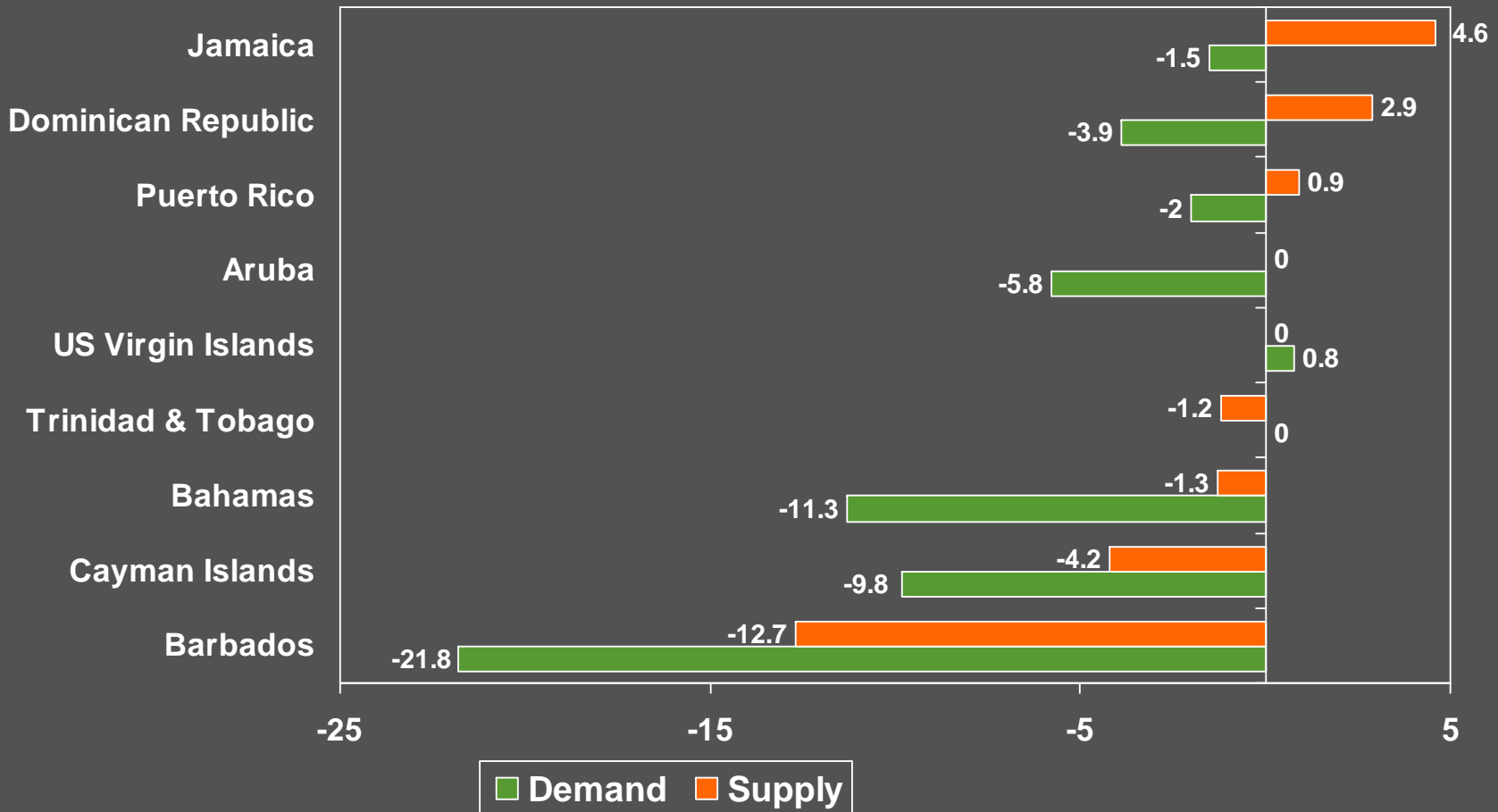
Weekday – Sunday thru Thursday
Weekend – Friday and Saturday

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Select Nations

Room Supply vs. Demand Percent (%) Change
YTD ending November 2009

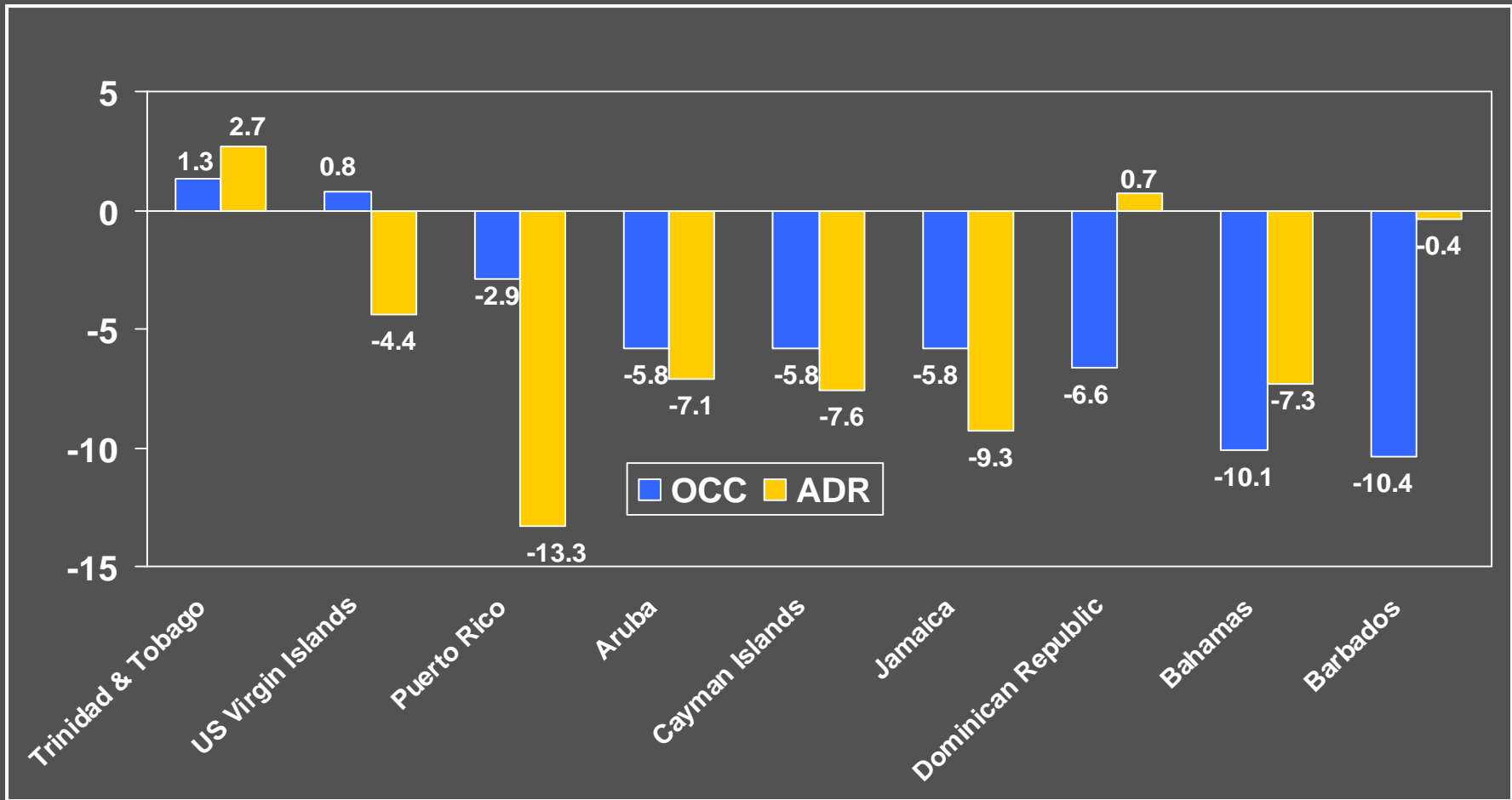


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Select Nations

OCC/ADR Percent (%) Change
YTD ending November 2009



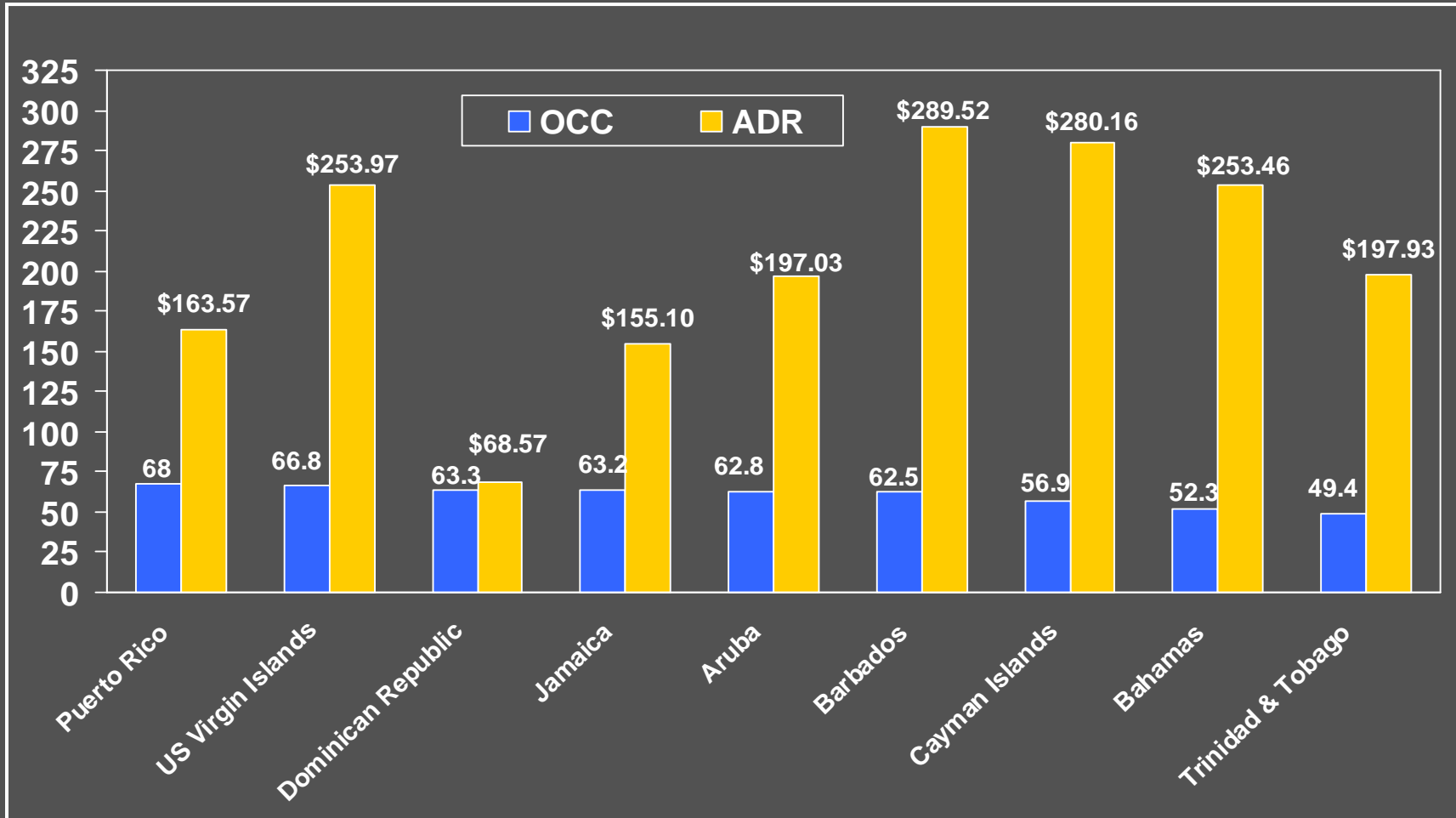
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Select Nations

Actual OCC/ADR

YTD ending November 2009

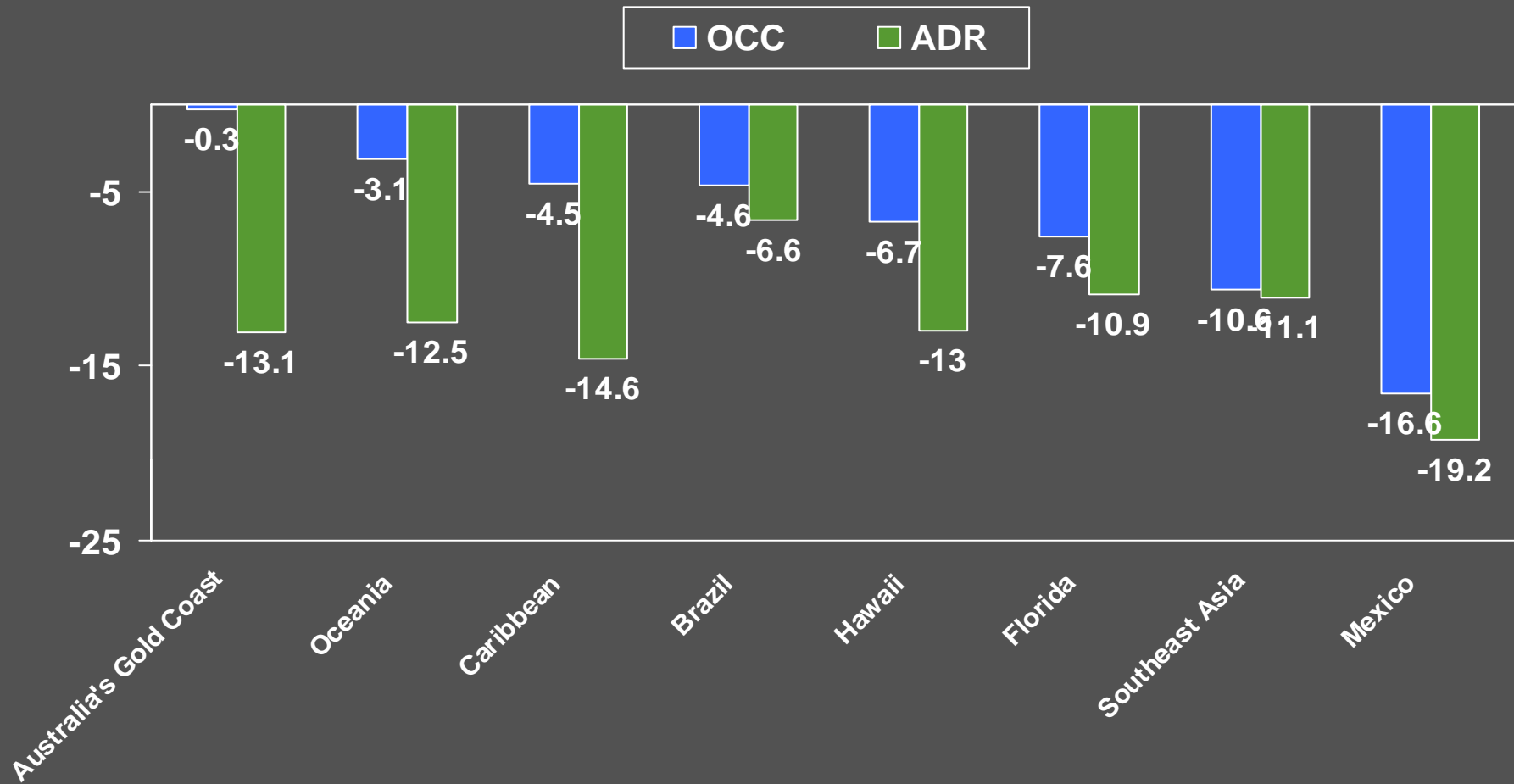


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Select Destinations

OCC/ADR Percent (%) Change
YTD ending November 2009



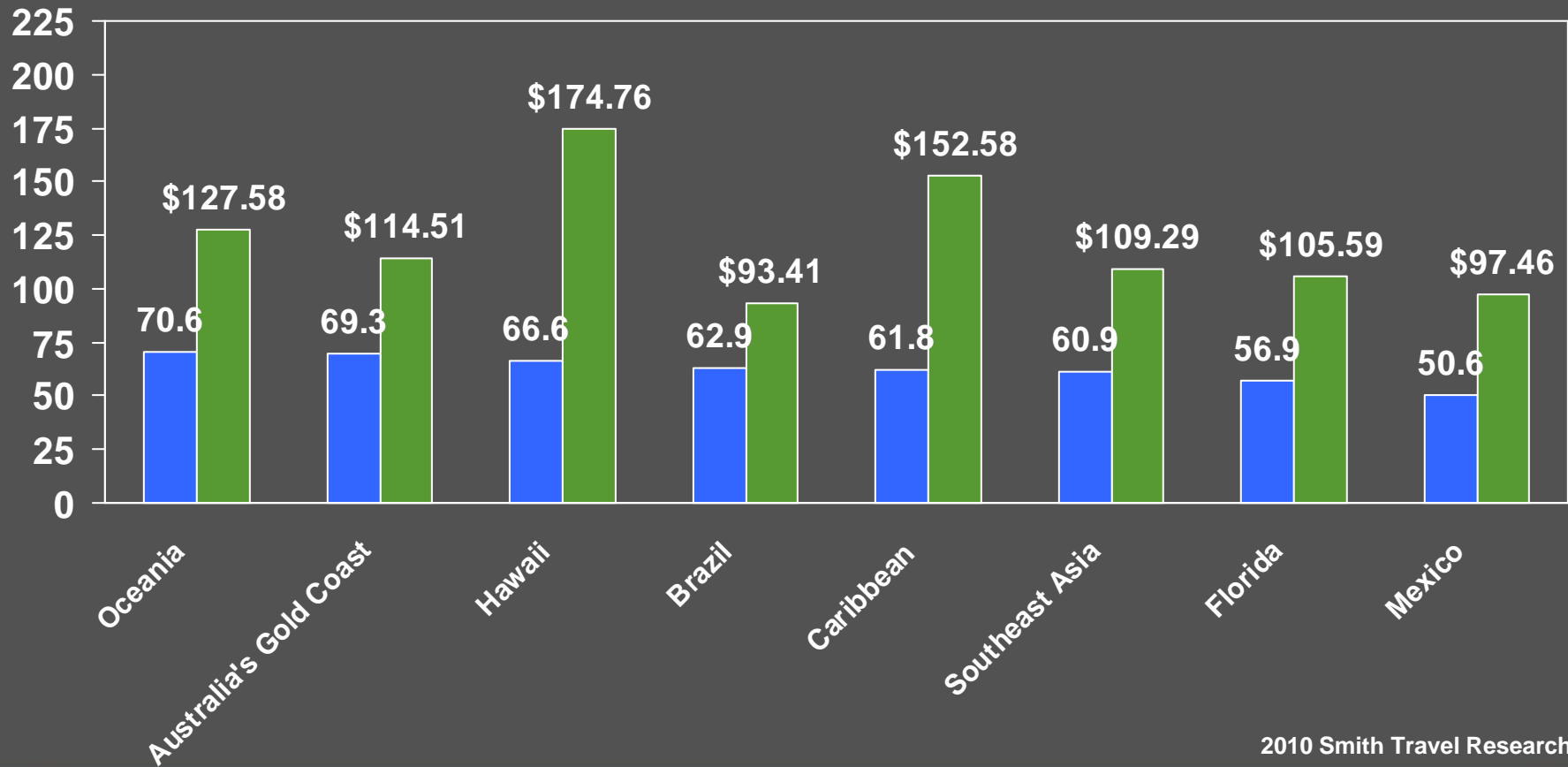
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Select Destinations

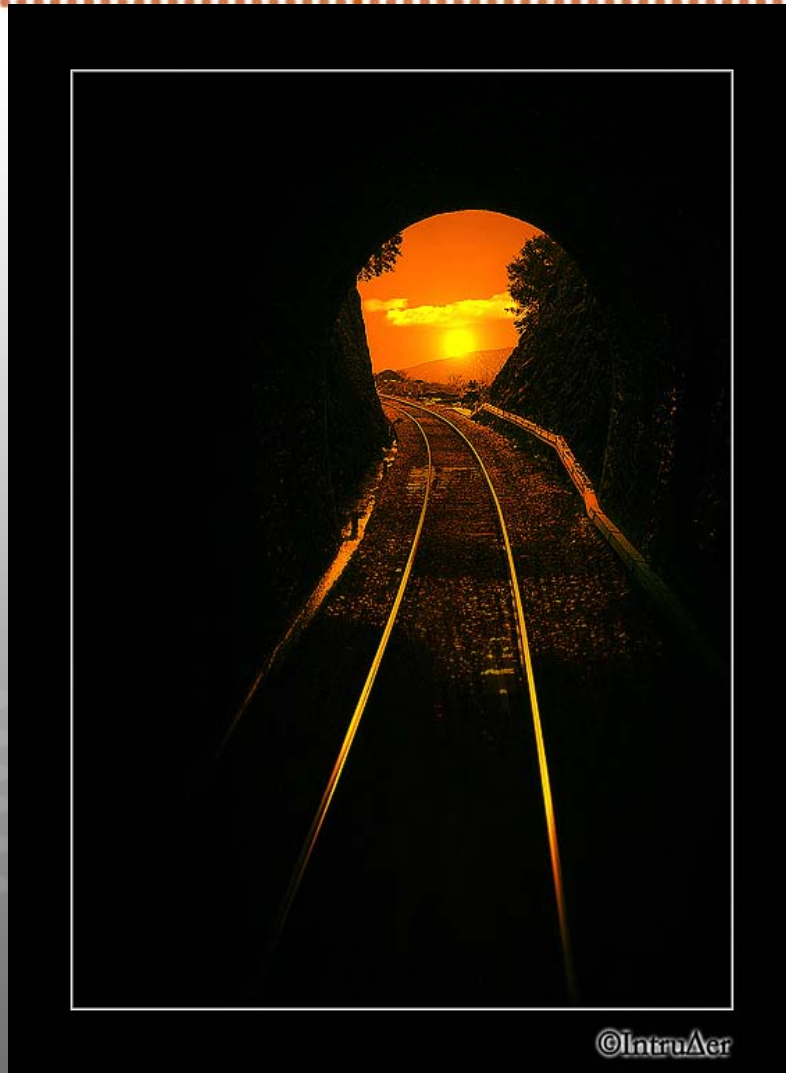
Actual OCC/ADR (\$USD)

YTD ending November 2009



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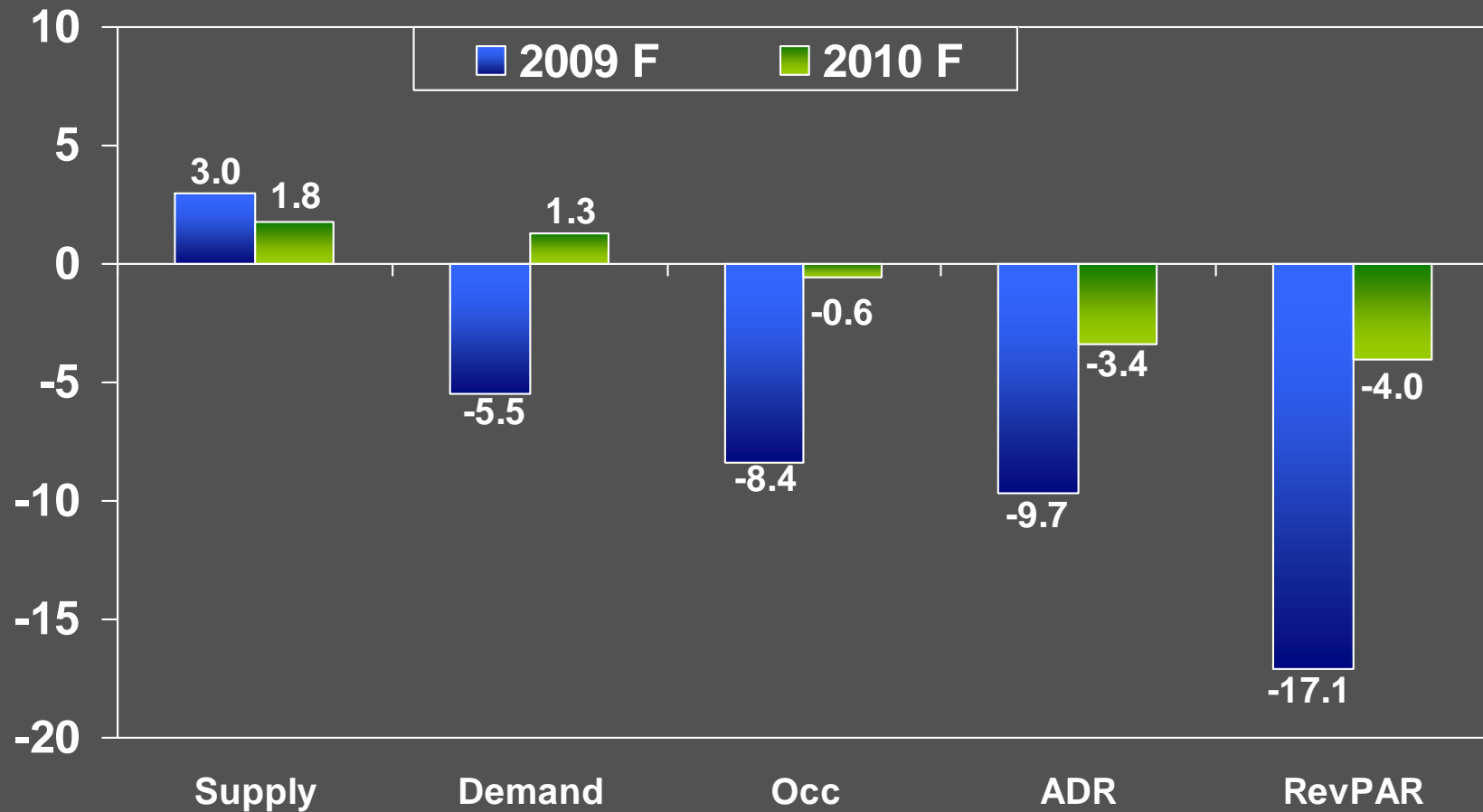
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Total United States

Key Performance Indicators Percent Change
Full Year 2009 & 2010 Forecast



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Takeaways

- Supply growth still an issue
- Demand declines may be near bottom
- Transient business leads rebound
- “Less Worse” 1st half of 2010
- Meaningful growth anticipated 2011
- ADR Growth?

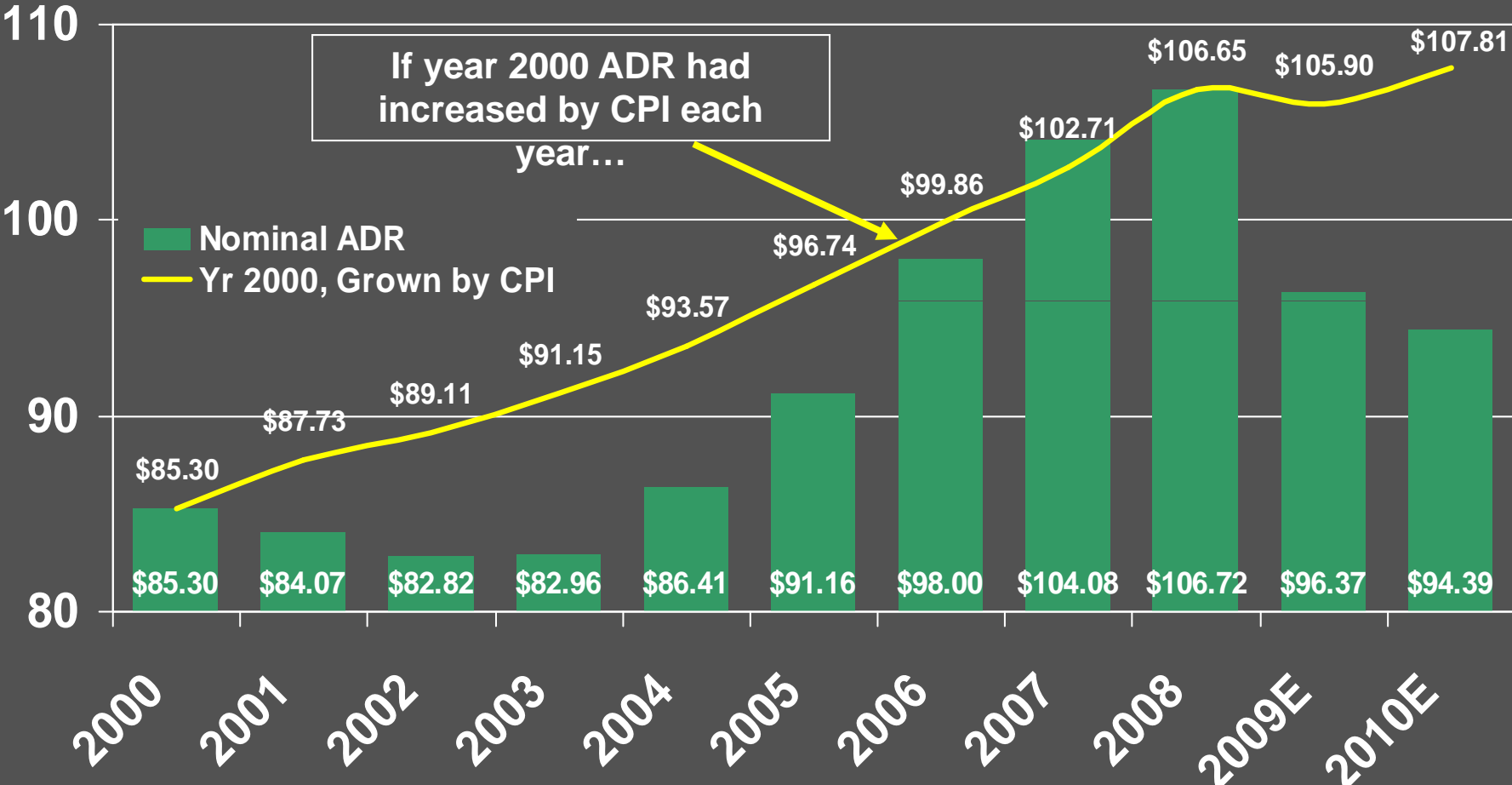
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Total United States Room Rates

Actual vs. Inflation Adjusted

2000 – 2010E



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STR Participant Program Overview

Brittany Baldwin
Sales Executive – Caribbean & Southern U.S.



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Participation Overview

As of December 2009

Total US Industry:

- 50,910 hotels / 4,764,151 rooms
- 28,083 participating hotels / 3,335,234 rooms
- Sample 70% of hotel room supply

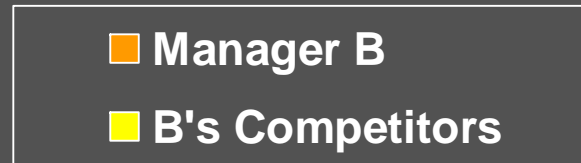
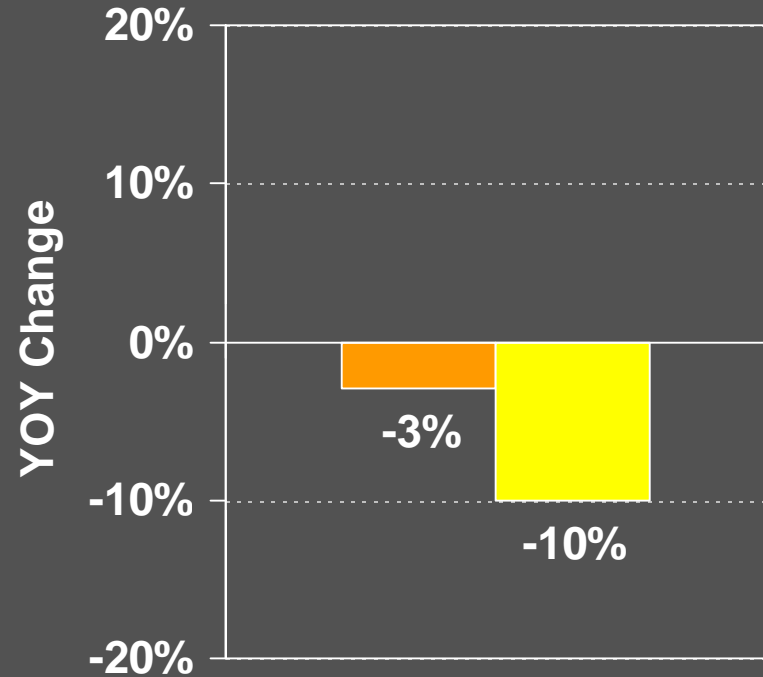
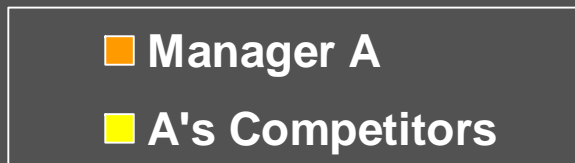
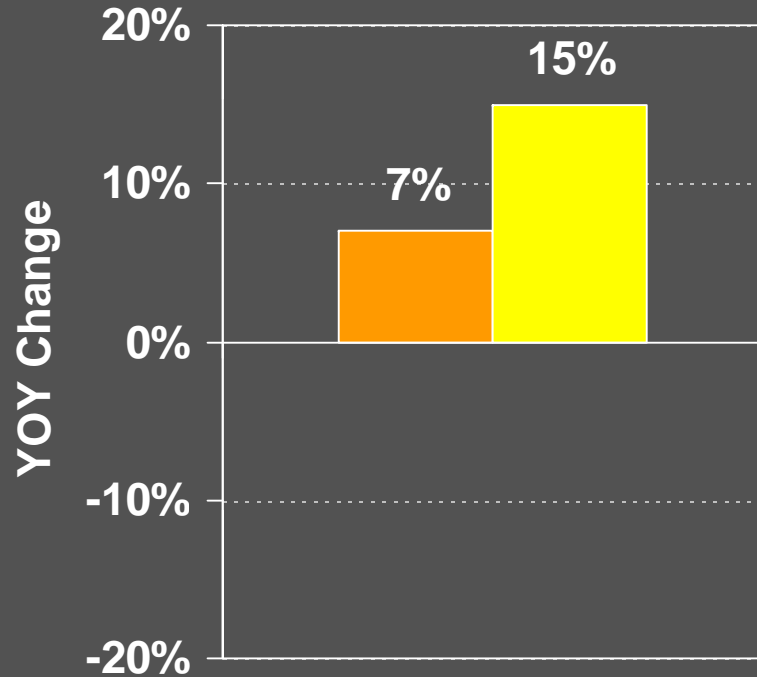
Total Caribbean Industry:

- 2,265 hotels / 240,421 rooms
- 184 participating hotels / 52,9278 rooms
- Sample 22% of hotel room supply

Why Should a Hotel 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

Benchmarking: My Property vs. My Comp Set



Caribbean Promotions:

Participating hotels can receive

- **STAR** report = compset & market comparison
Pricing: Caribbean promo 1st year complimentary

OR

- **Hotel Survey** = market comparison only
Pricing: Complimentary

How can Hotels on my island participate?

- Participation is easy
- Less than 5 minutes a month to submit the data via our secure website – www.strglobal.com
- Report delivered via email in Excel format
- Data is kept confidential
- Stop by marketplace booth # or contact STR to obtain more information

Association Benefits:

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



Questions?

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