



Puerto Rico Non-Metropolitan Area Regional Tourism Overview

Presented by

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Puerto Rico Tourism Overview FY 2007

San Juan and Non-Metro Area Lodgings

San Juan Metro Area

- Total Registrations 1,177,000
- Non-Residents 83.7% 984,771
- PR Residents 16.3% 192,141
- Hotel Rooms 53.7% 6,179
- Room Nights Occupied 1,766,677
- Occupancy Rate 78.3%
- Avg. Daily Rate (ADR) \$148.01
- Avg. Length of Stay 2.5

Non-Metropolitan Area

- Total Registrations 872,927
- Non-Residents 50.2% 438,321
- PR Residents 49.8% 434,606
- Hotel Rooms 46.3% 5,324
- Room Nights Occupied 1,103,168
- Occupancy Rate 56.8%
- Avg. Daily Rate (ADR) \$110.09

- *Includes Paradores*

Non-Metropolitan Area Lodgings

(Includes Paradores)

Fiscal Year	2003	2007	Annual % Change
Total Registrations	690,327	872,927	6.0%
Non-Residents	288,648	438,321	11.0%
PR Residents	401,679	434,606	2.0%
Number Hotel Rooms	4,475	5,324	4.4%
Room Nights Occupied	857,865	1,103,168	6.5%
Occupancy Rate	52.5%	56.8%	2.0%

Non-Metropolitan Area Lodgings

(Excludes Paradores)

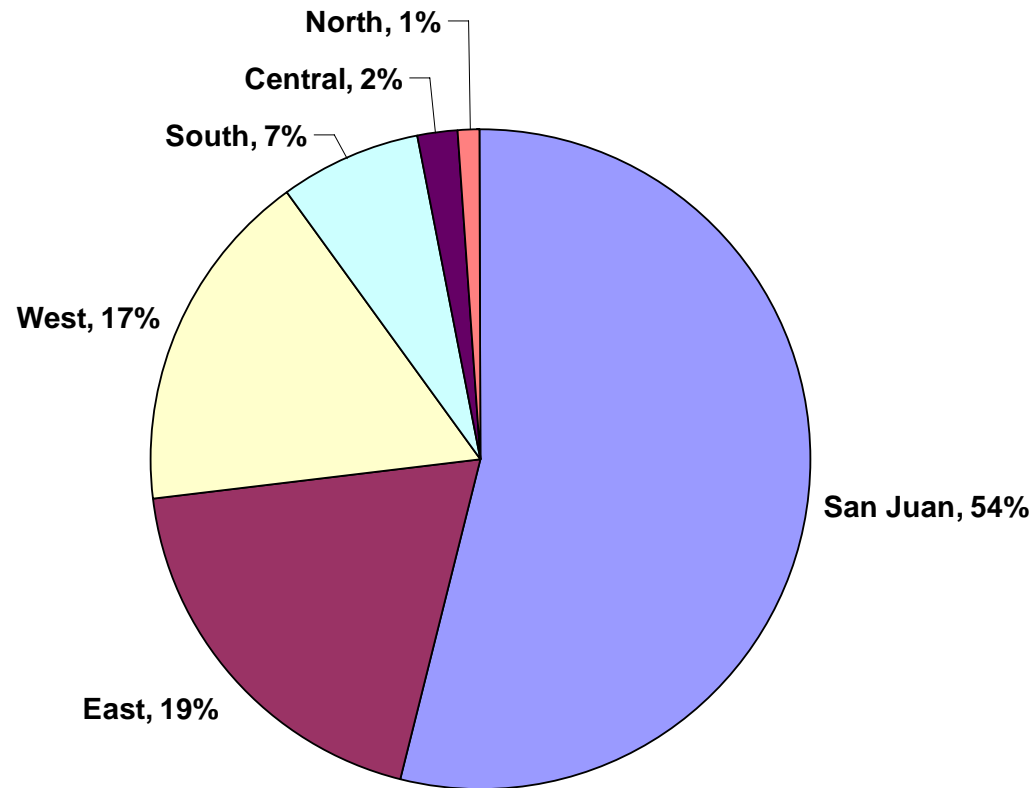
Fiscal Year	2003	2007	Annual % Change
Total Registrations	508,539	731,444	9.5%
Non-Residents	251,662	409,541	12.9%
PR Residents	256,877	321,903	5.8%
Number Hotel Rooms	3,417	4,453	6.8%
Room Nights Occupied	678,860	968,357	9.3%
Occupancy Rate	54.4%	59.6%	2.3%

Non-Metro Area Lodgings By Region

(Includes Paradores)

FY 2007	Hotel Rooms	% Total	Non- Residents	PR Residents	Occupancy Rate
San Juan Metro	6,179	54%	84%	16%	78.3%
West Porta del Sol	1,926	17%	29%	71%	44.4%
Central	232	2%	57%	43%	46.7%
East	2,176	19%	74%	26%	69.3%
South Porta Caribe	839	7%	32%	68%	57.1%
North	150	1%	24%	76%	47.7%

Distribution of Lodging Accommodations



Non-Metro Area Lodgings By Region

(Includes Paradores)

FY 2007	Under 80 Rooms	81-200 Rooms	Over 200 Rooms	Total Rooms
Metro	566	1,641	3,971	6,178
% Total	9%	27%	64%	100%
West	1,368	558	0	1,926
Central	106	126	0	232
East	151	294	1,732	2,177
South	358	228	253	839
North	150	0	0	150
Total	2,133	1,206	1,985	5,324
% Total	40%	23%	37%	100%

East Region Overview

- Extends 55 miles along northeast and eastern coast of Island
- Expressway PR-66 & PR-53 connect East region to San Juan
- Río Grande, Luquillo, Fajardo, Ceiba, Naguabo, Humacao, Yabucoa, and off-shore islands of Vieques & Culebra
- 28,000-acre El Yunque Rain Forest, Luquillo Beach, Fajardo area marinas, 316-acre Las Cabezas de San Juan nature reserve & lighthouse, former 8,600-acre Naval Station Roosevelt Roads
- Large Destination Resorts, including 600-room Wyndham Grand Río Mar, 342-room Gran Meliá at Coco Beach, 918-room El Conquistador Resort & Las Casitas Village, and Palmas del Mar resort community
- Two new resorts – 113-room St. Regis Resort at Bahia Beach, and 314-room InterContinental Cayo Largo Resort
- Additions include two luxury boutique hotels at Palmas del Mar Resort with total 290 rooms, and proposed 370-room upscale resort hotel at Coco Beach Resort
- Nine championship golf courses plus new course at Cayo Largo Resort
- Primary air access - San Juan International Airport

South Region – Porta Caribe Overview

- Encompasses 65-mile corridor stretching along southern coast from Patillas on east to Yauco on west, and 25 miles north to Jayuya
- Ponce largest city with 181,000 pop. Located 78 miles or 1.5 hours driving time from San Juan, and 47 miles or 57 minutes from Mayaguez
- Government committed \$250 million to Port of Americas deep draft port
- Principal air access from US mainland through San Juan
- Three daily Commuter flights from San Juan to Ponce Mercedita Airport
- Limited flights to Ponce from New York, Orlando, Ft. Lauderdale
- Ponce Municipality developing 105,000 SF convention center with proposed 150-room Four Points hotel & casino
- Ponce Municipality proposes Aquarium at La Guancha park
- New horse racing track approved at planned 500-acre Parque Ecuestre La Esmeralda in Santa Isabel, to include 150-room hotel and 600 homes
- 253-room Hilton Ponce Golf & Casino only branded resort on Caribbean
- Two other branded hotels are 116-room Holiday Inn & Casino, and 120-room Howard Johnson in Ponce

West Region – Porta del Sol Overview

- Porta del Sol western coastal region extends from Quebradillas and Isabela on north, through Guánica on southwest coast
- Metro areas include Aguadilla-Isabela-San Sebastián MSA with 333,000 pop, the San Germán-Cabo Rojo MSA with 145,000 pop, and Mayaguez MSA with 112,000 pop
- Popular tourist destinations Isabela, Rincón, Boquerón, La Parguera (bioluminescent bay) and Guánica
- Many of Island's best known small inns, guesthouses & local restaurants
- Guánica dry forest is International Biosphere Reserve
- Primary air access from US mainland through San Juan
- Three daily commuter flights from San Juan to Mayaguez
- Limited flights to Aguadilla airport from New York, Orlando, Ft. Lauderdale
- Plans to expand Rafael Hernández International Airport in Aguadilla
- 5 hotels with over 100 rooms each account for 30% of room inventory
- New 150-room Marriott Courtyard & Casino in Aguadilla
- Mayaguez site of Central American & Caribbean Games in 2010

Central Region Overview

- Central Region encompasses a 50-mile corridor that extends from Caguas on east to Lares on west, and six miles south from Guaynabo to Cayey
- Majority of population concentrated along Expressway PR-52 that connects San Juan to Ponce on south coast
- Caguas is region's largest municipality with 143,000 pop.
- Seven cities along the PR-52 corridor, with 382,000 pop, included in San Juan-Caguas-Guaynabo MSA.
- Tourist attractions include Panoramic Route thru Cordillera Central mountain range, Lago Dos Bocas & Caguana Indian Ceremonial Park in Utuado, Rio Camuy Cave Park near Lares and Arecibo radio telescope
- Primary air access through San Juan located 20 miles, or 24 minutes driving time from Caguas, and 34 miles or 36 minutes from Cayey
- Only branded hotel is 126-room Four Points Hotel & Casino in Caguas
- 108 total rooms in several small inns throughout central region that cater primarily to local residents on weekends, holidays & summer vacation

North Region Overview

- The North Region extends 42 miles along the northern coast of the Island from Dorado on the east to Arecibo and Hatillo on the west
- Largest city is Arecibo with 102,000 pop.
- Main cities include Dorado, Manatí, Barceloneta, Arecibo & Hatillo
- Regional population approximately 568,000 along North coast
- 17 of Puerto Rico's largest manufacturing companies in North Region
- Currently only full-service hotel is 174-unit Embassy Suites in Dorado
- Plans to redevelop former Hyatt Dorado Beach Resort that includes 500-room Hyatt Regency Cerromar Hotel that closed in 2003 and 262-room Hyatt Dorado Beach Resort that closed in 2006, with four golf courses
- New 125-room Four Points Sheraton Hotel & Casino proposed in Barceloneta next to Prime Outlet Mall being expanded to 336,000 SF
- Primary air access from US mainland through San Juan

Regional Market Opportunities & Constraints

- Need increased air access from U.S. mainland to international airports in Aguadilla and Ponce
- Potential international airport and cruise ship port at former Roosevelt Roads Naval Station near Fajardo
- Commercial hotel demand depends on reinvigorated economy
- Future development potential on off-shore island of Vieques like St. John in U.S. Virgin Islands
- Southwest coast by Guánica has opportunity for future resort hotel development with improved air access from US mainland
- Need to consider environmental factors in new development
- Opportunity for boutique hotels, small inns & “eco-resorts” on Island
- Capitalize on natural, historical & cultural aspects in regional markets