

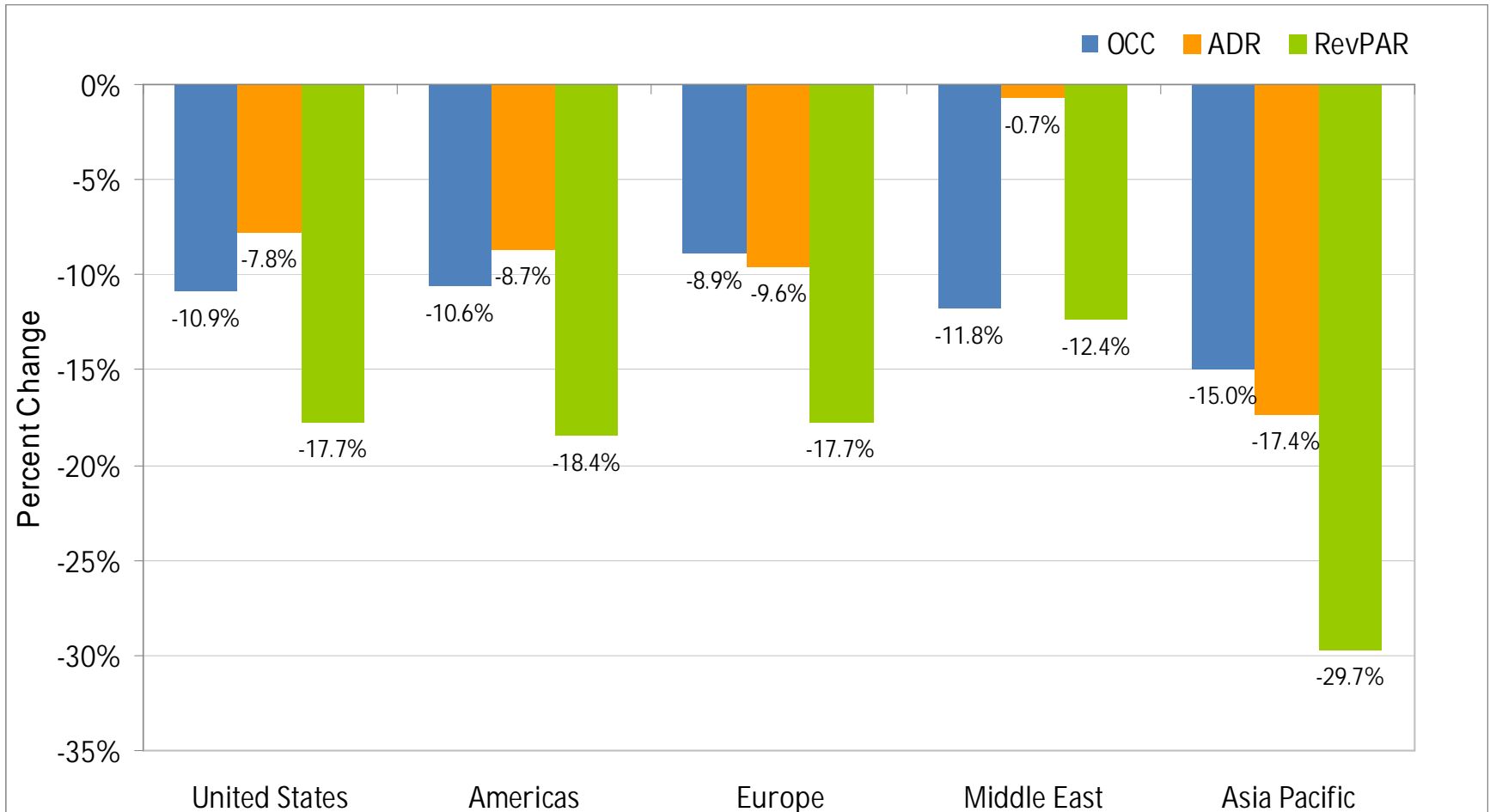
Smith Travel Conference

State of our Industry

August 2009

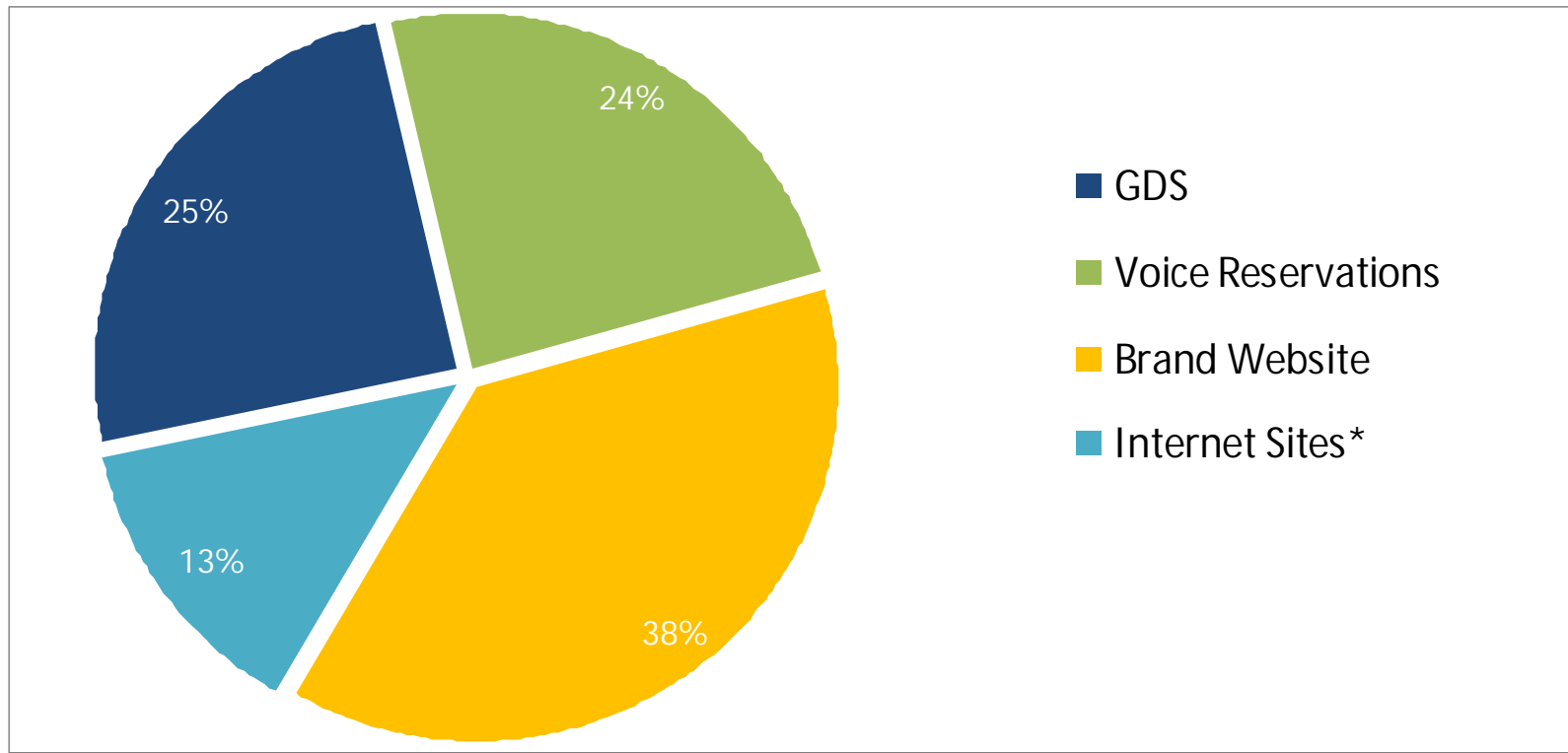
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Director, Revenue Optimization
kwhite@travelclick.net

At-A-Glance : Global Hotel Performance YTD 2009



- The Brand Website revenue contributed 37.8% of the \$10.7 billion total revenue booked by the CRO

Revenue by Channel



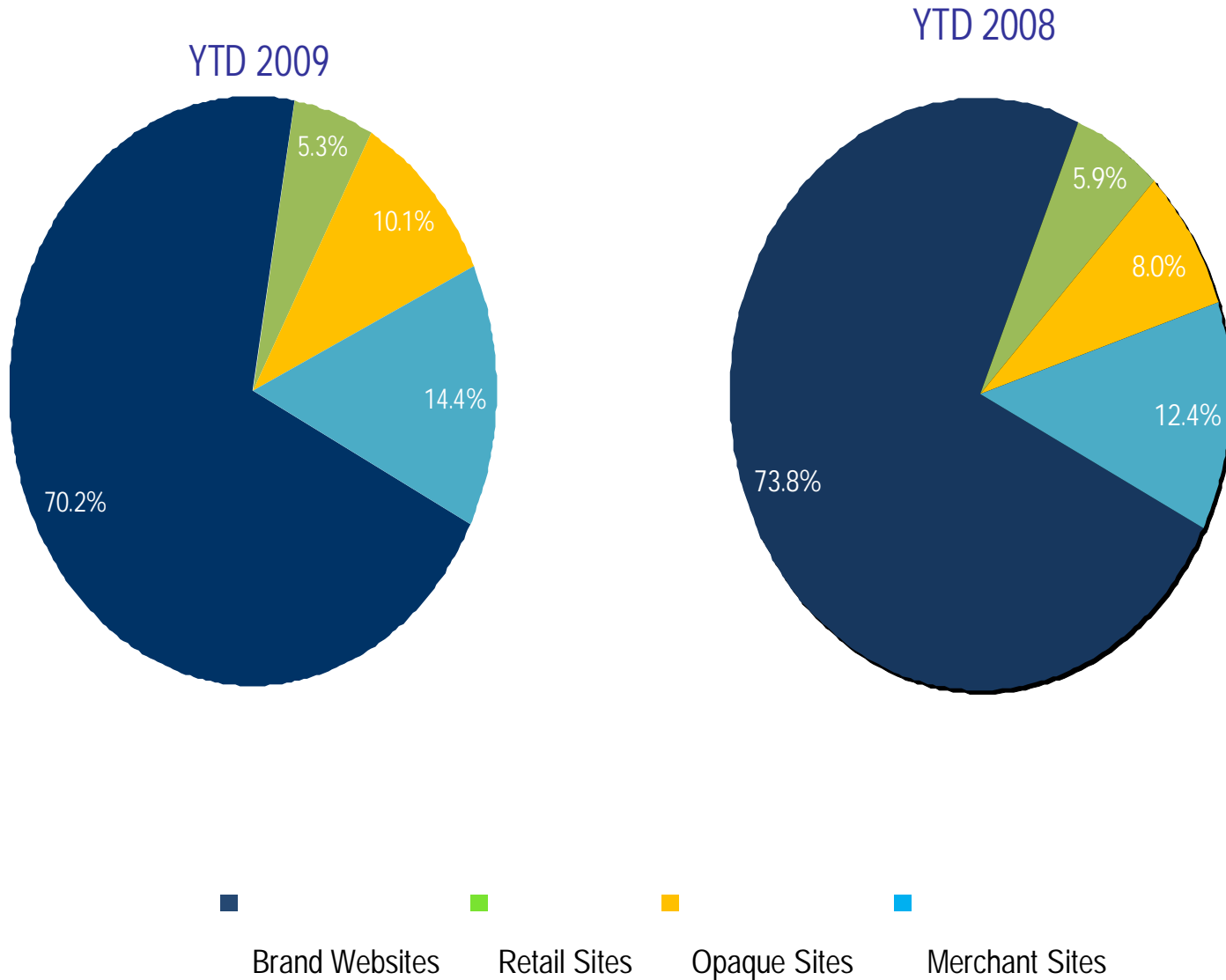


Chart above reflects reservations processed through a CRO
Property websites and other Internet reservations not booked through the CRO are not included

GDS : Historical Performance

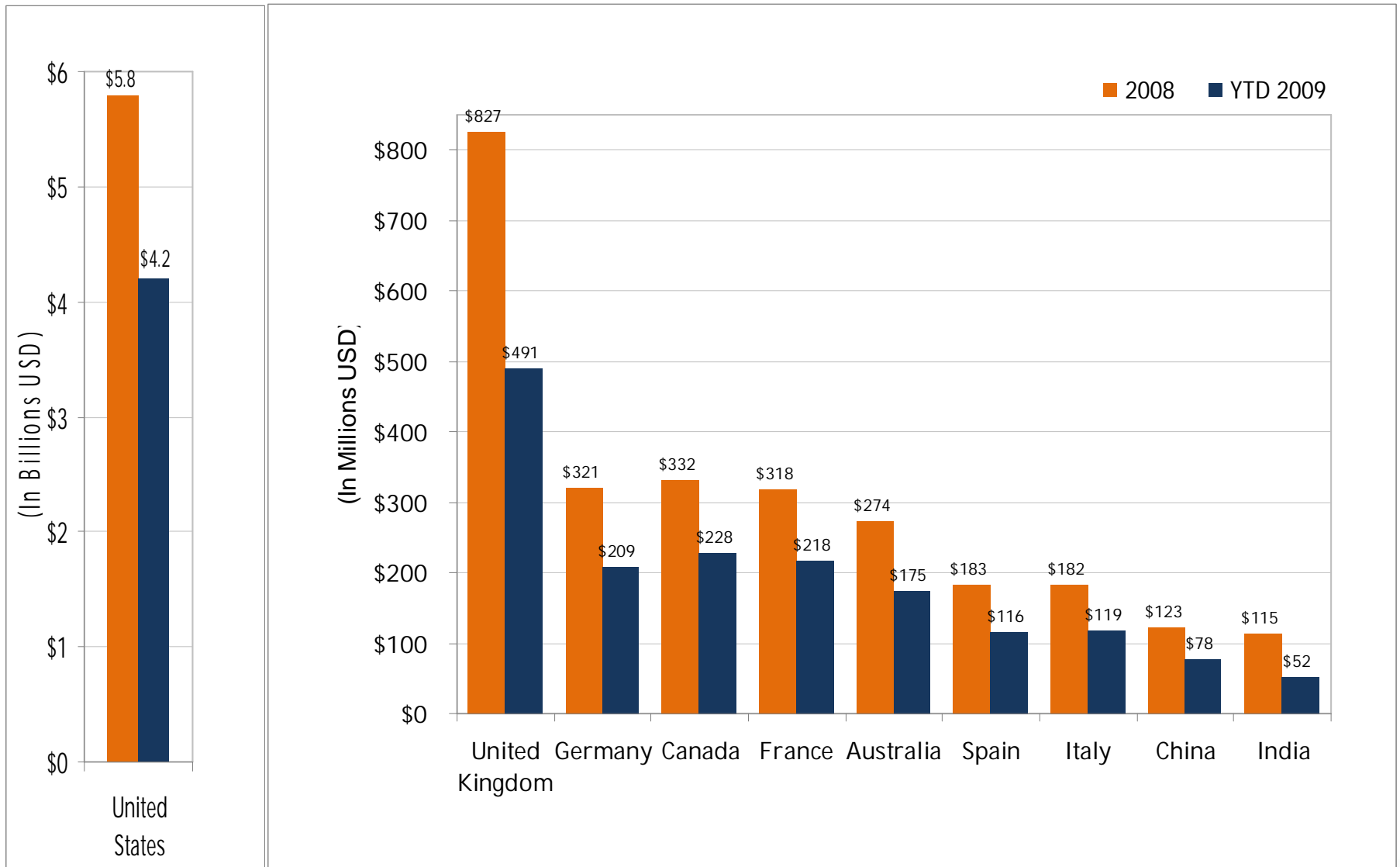


Trend : Location & Segment Determining Growth Rate

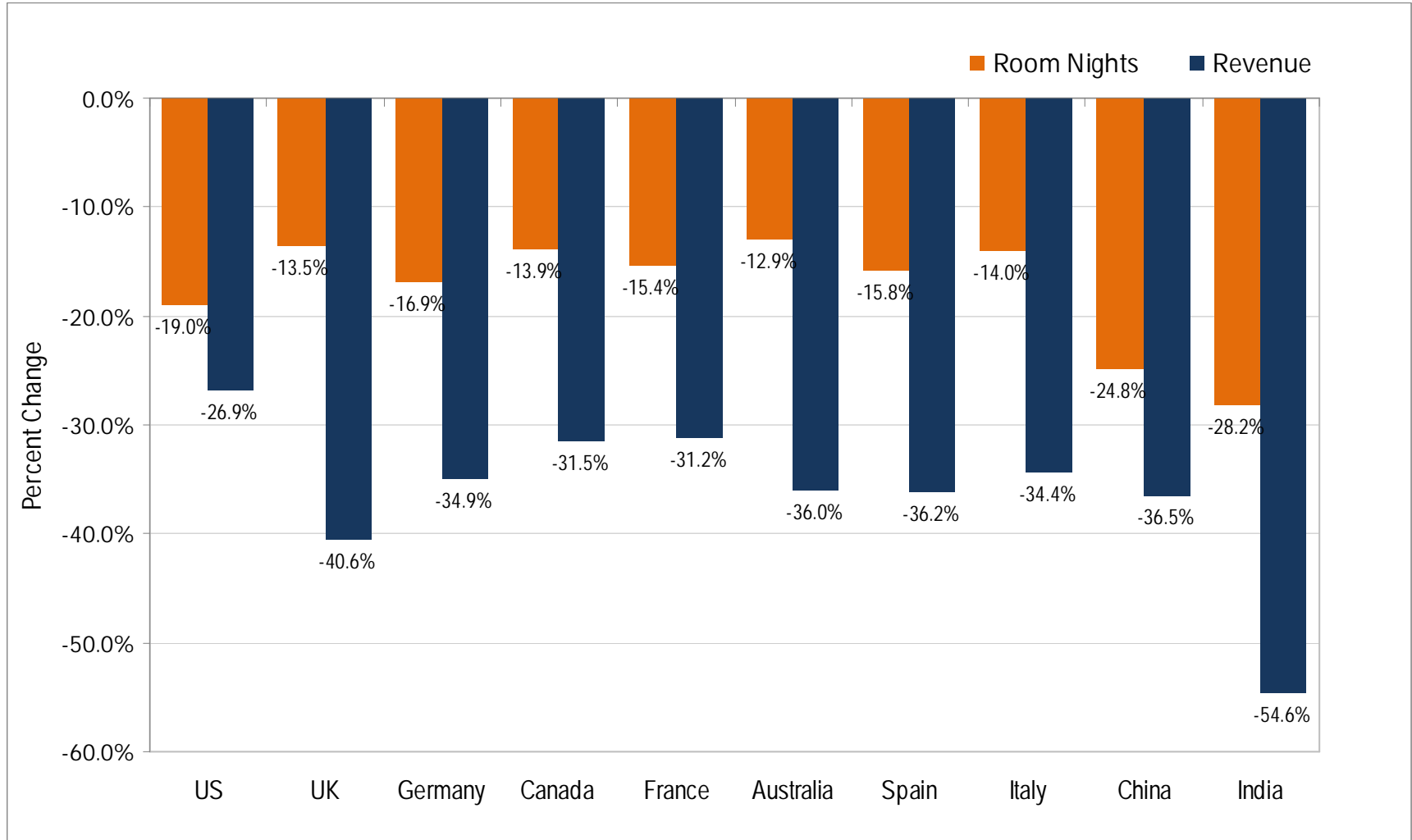


		Room Nights % Change	ADR % Change
United States	Big Brand	-14.5%	-7.7%
	Small/Medium Chains	-24.7%	-10.6%
	Independents	-27.4%	-11.0%
Europe	Big Brand	-13.2%	-25.2%
	Small/Medium Chains	-13.7%	-25.5%
	Independents	-6.4%	-25.5%
Asia Pacific	Big Brand	-17.7%	-25.0%
	Small/Medium Chains	-28.1%	-21.3%
	Independents	-13.7%	-25.7%

Trend : GDS Performance by Country



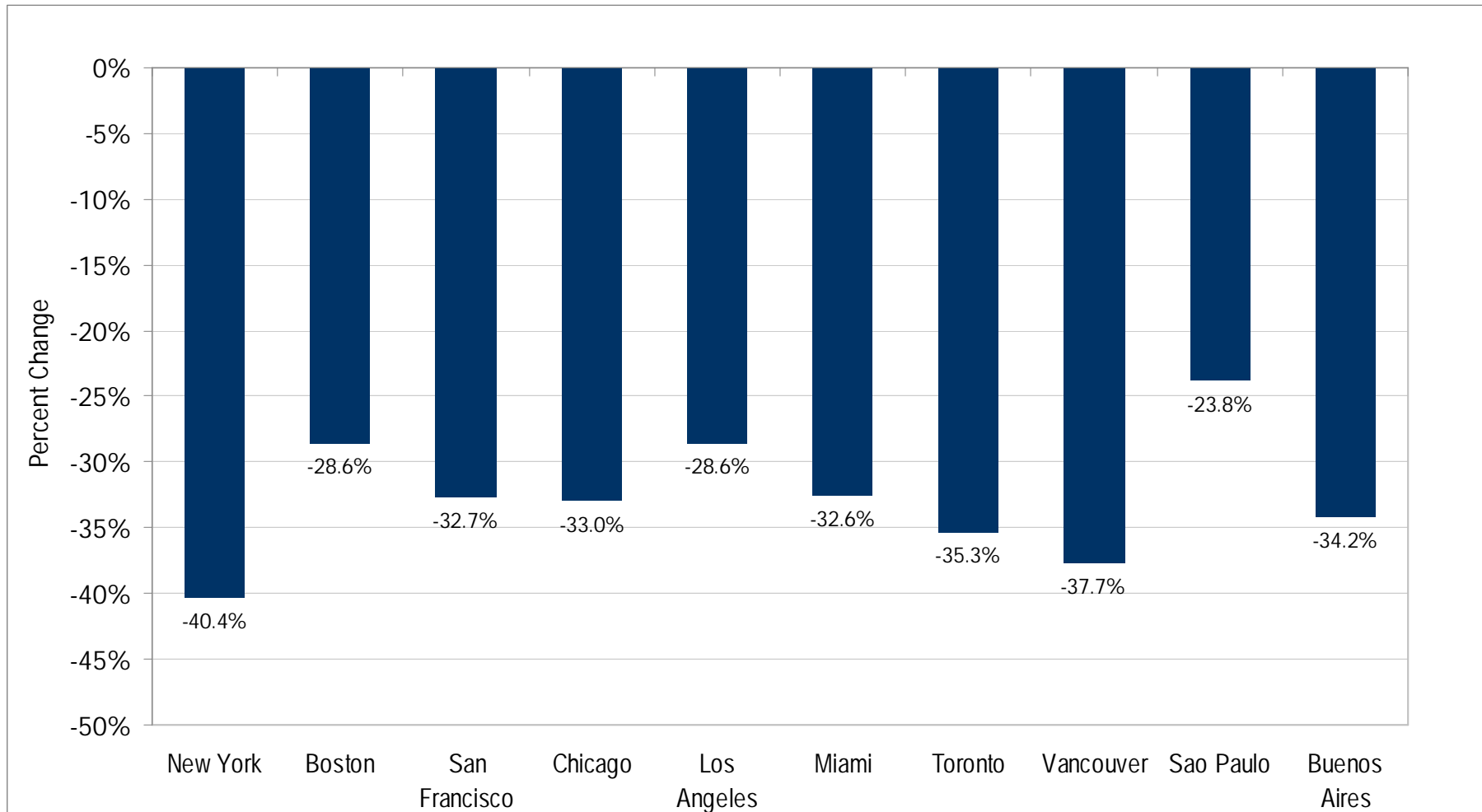
Trend : ADR's Plummet



Top 10 : GDS Markets Performance (Revenue)



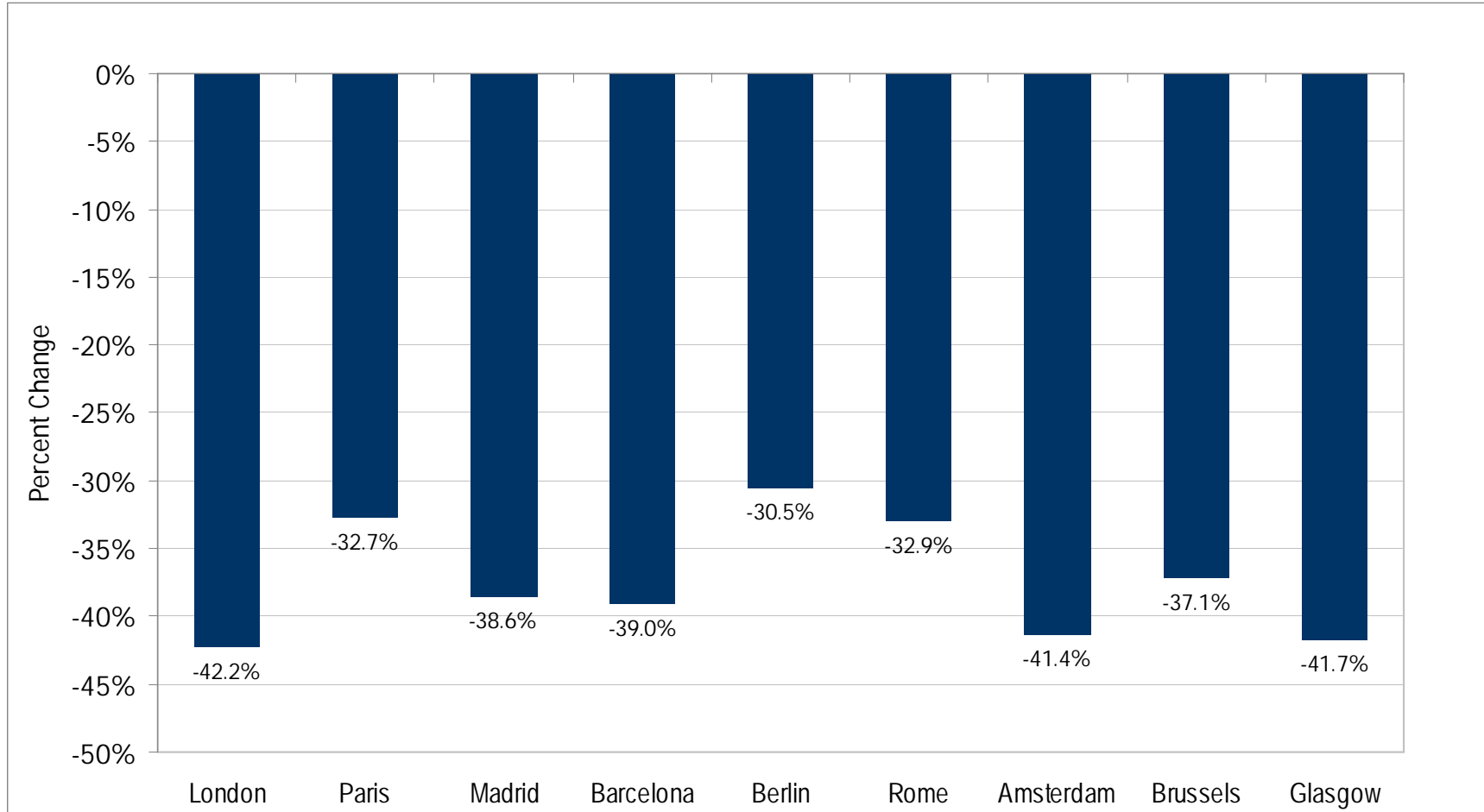
Americas



Top 10 : GDS Markets Performance (Revenue)



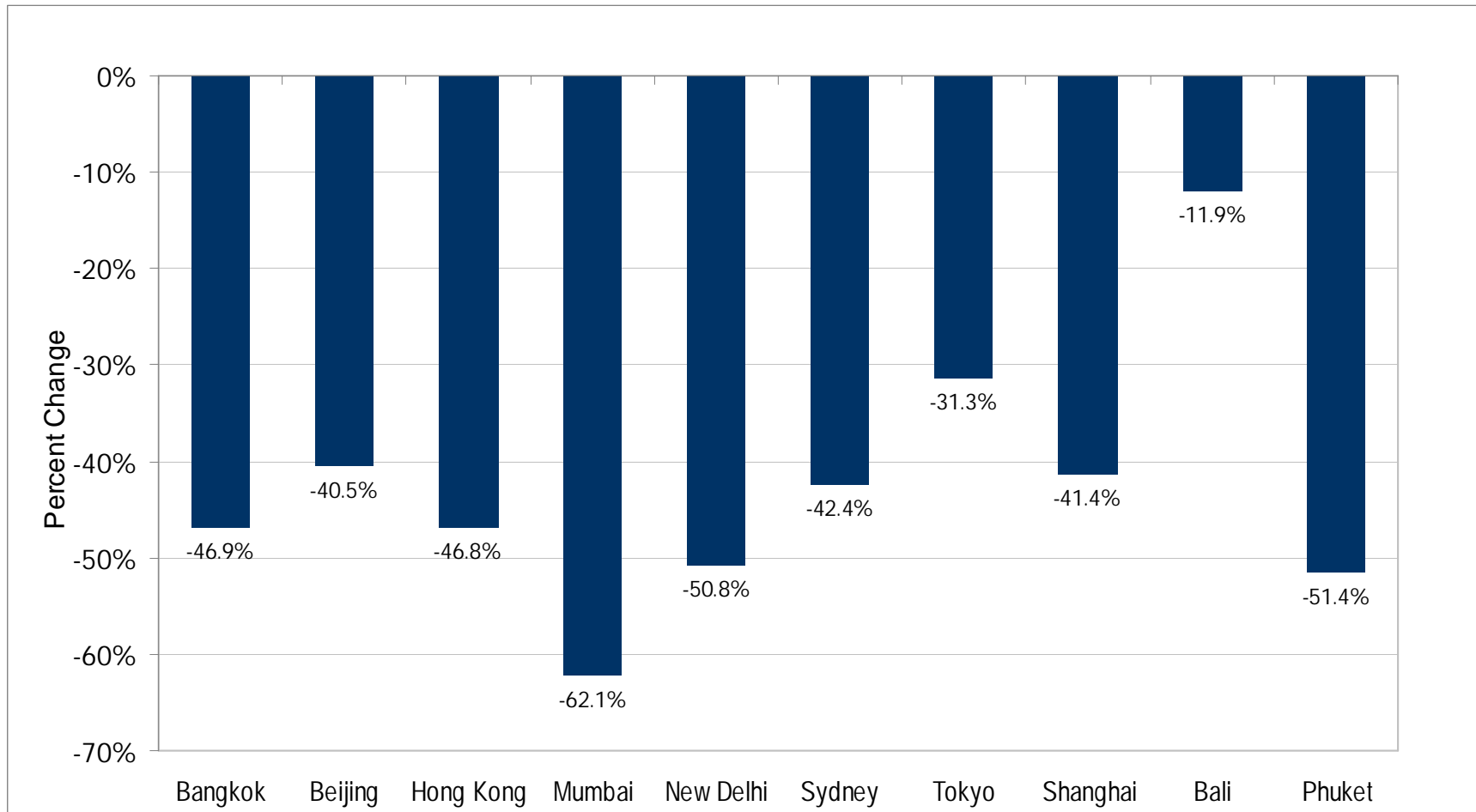
Europe



Top 10 :: GDS Markets Performance (Revenue)



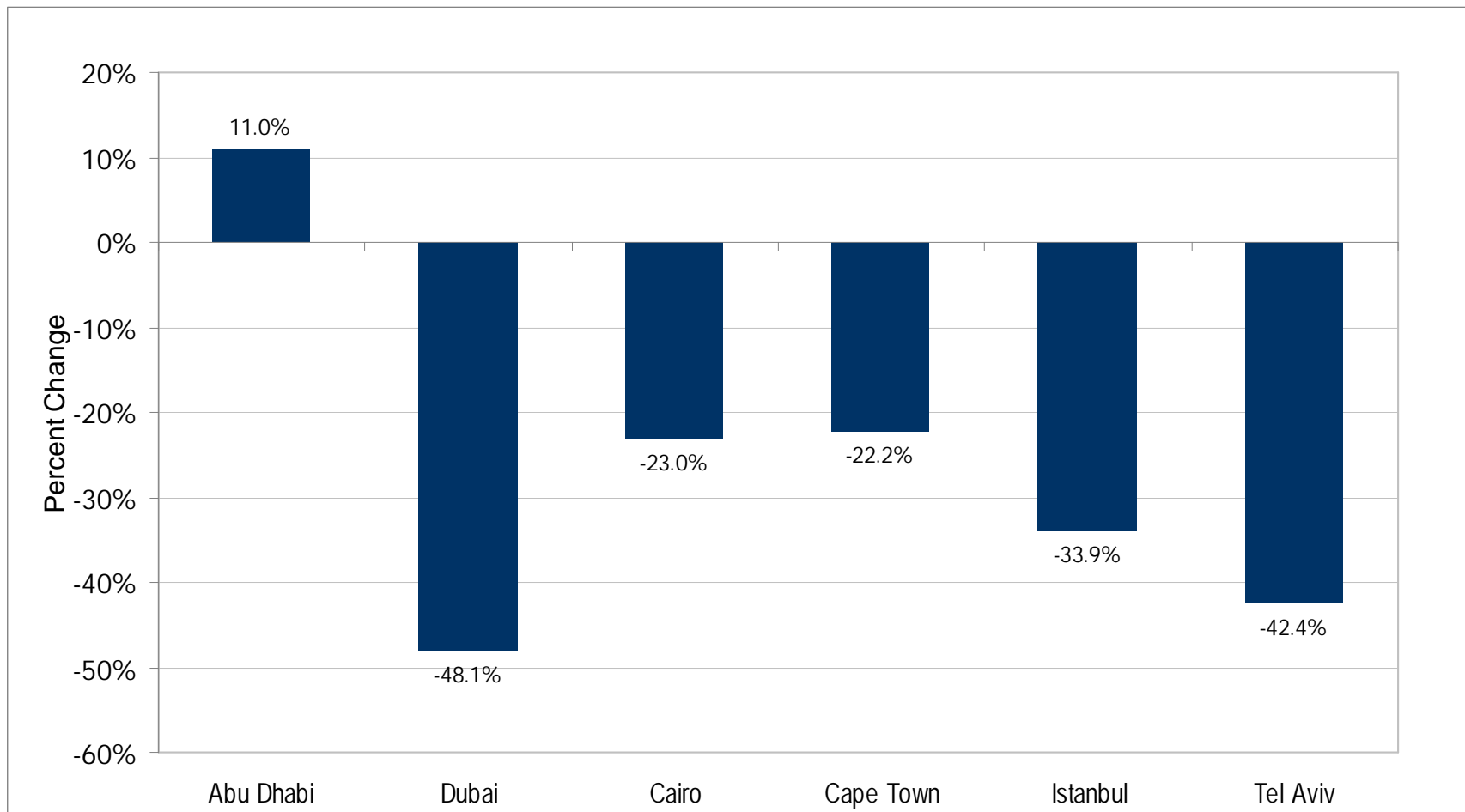
Asia Pacific



Top 6 : GDS Markets Performance (Revenue)



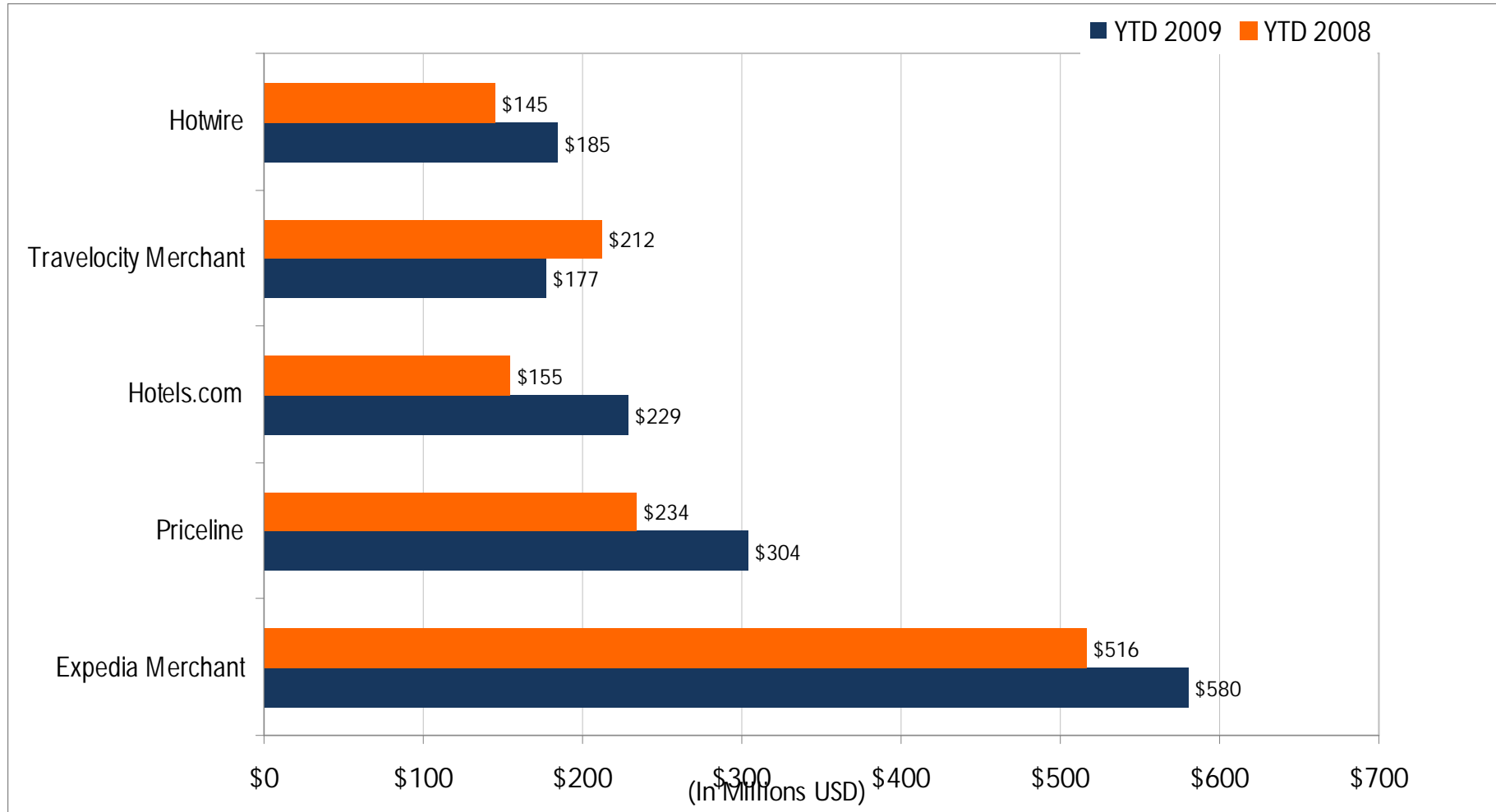
Middle East/Africa



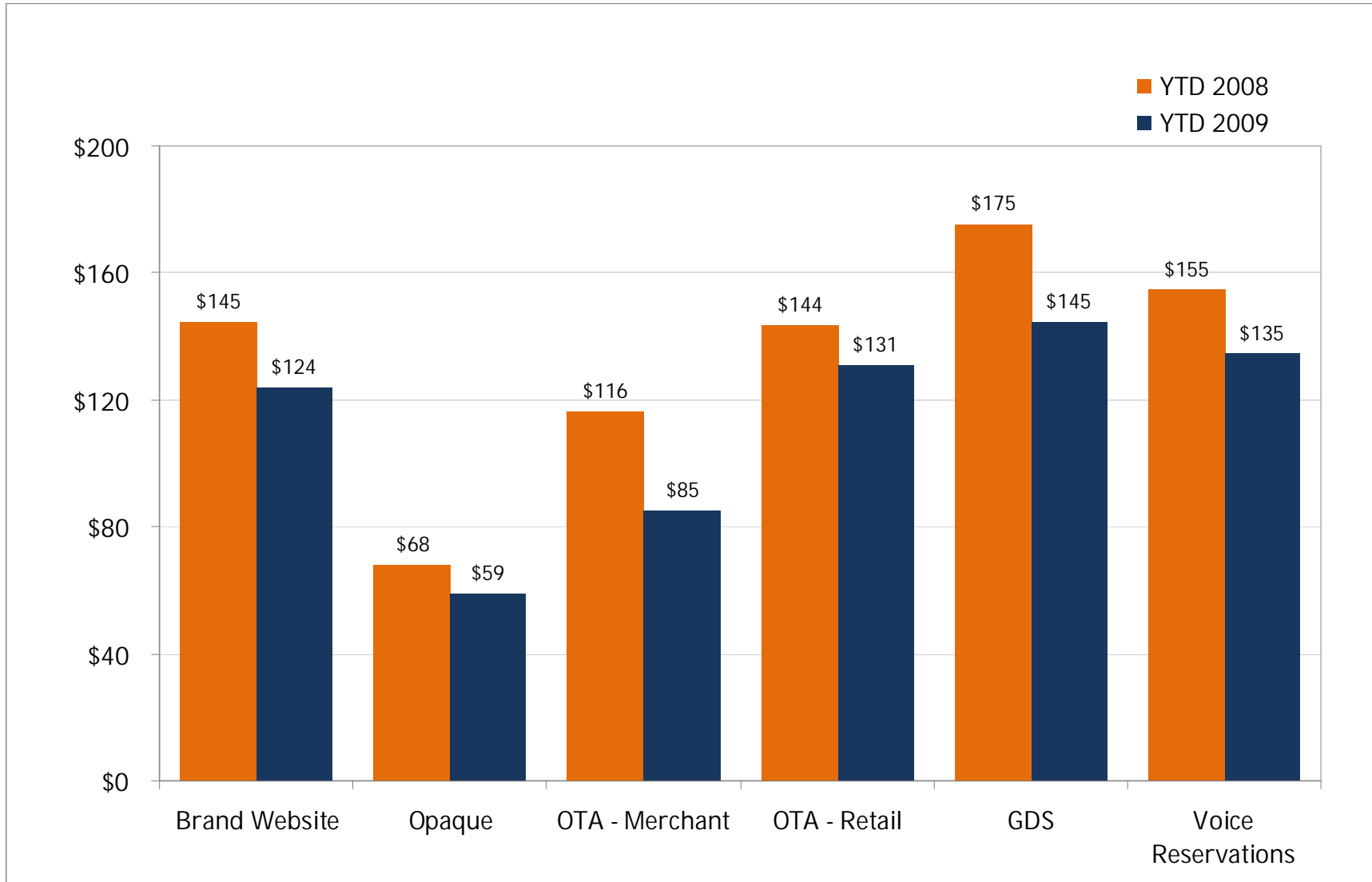
OTA : Third Party Internet Revenue



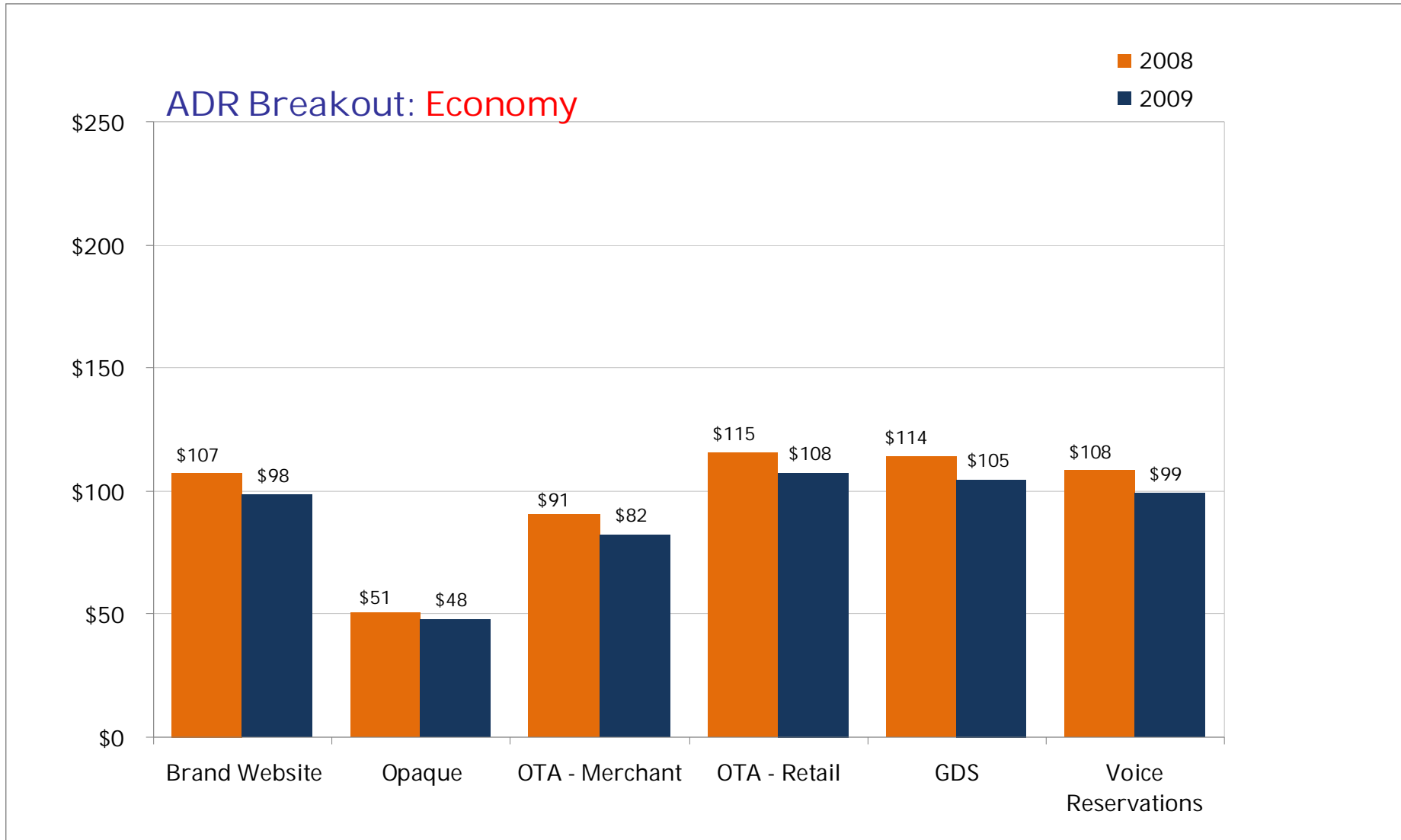
Market Share of Third-Party Internet Reservations



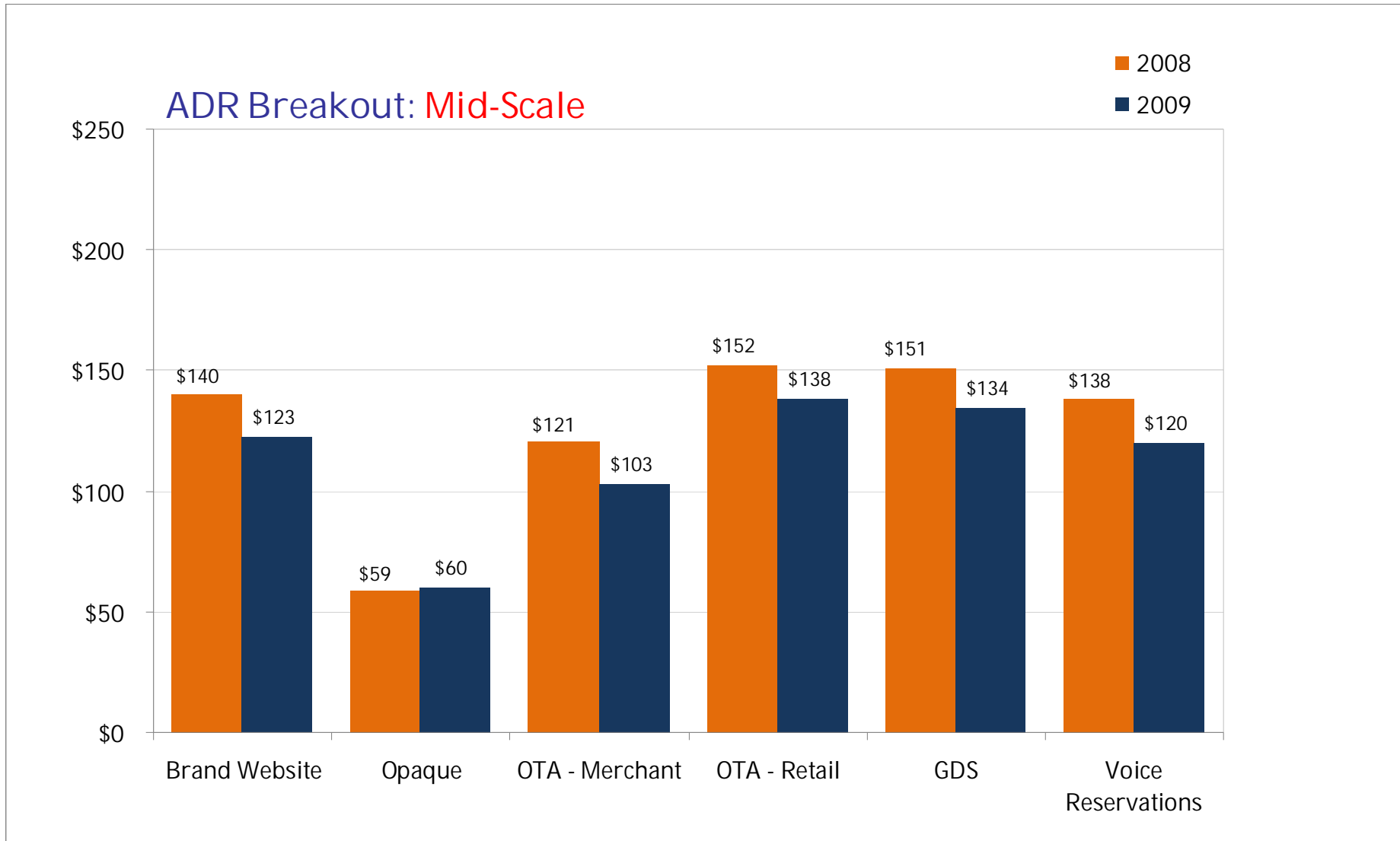
ADR by Channel



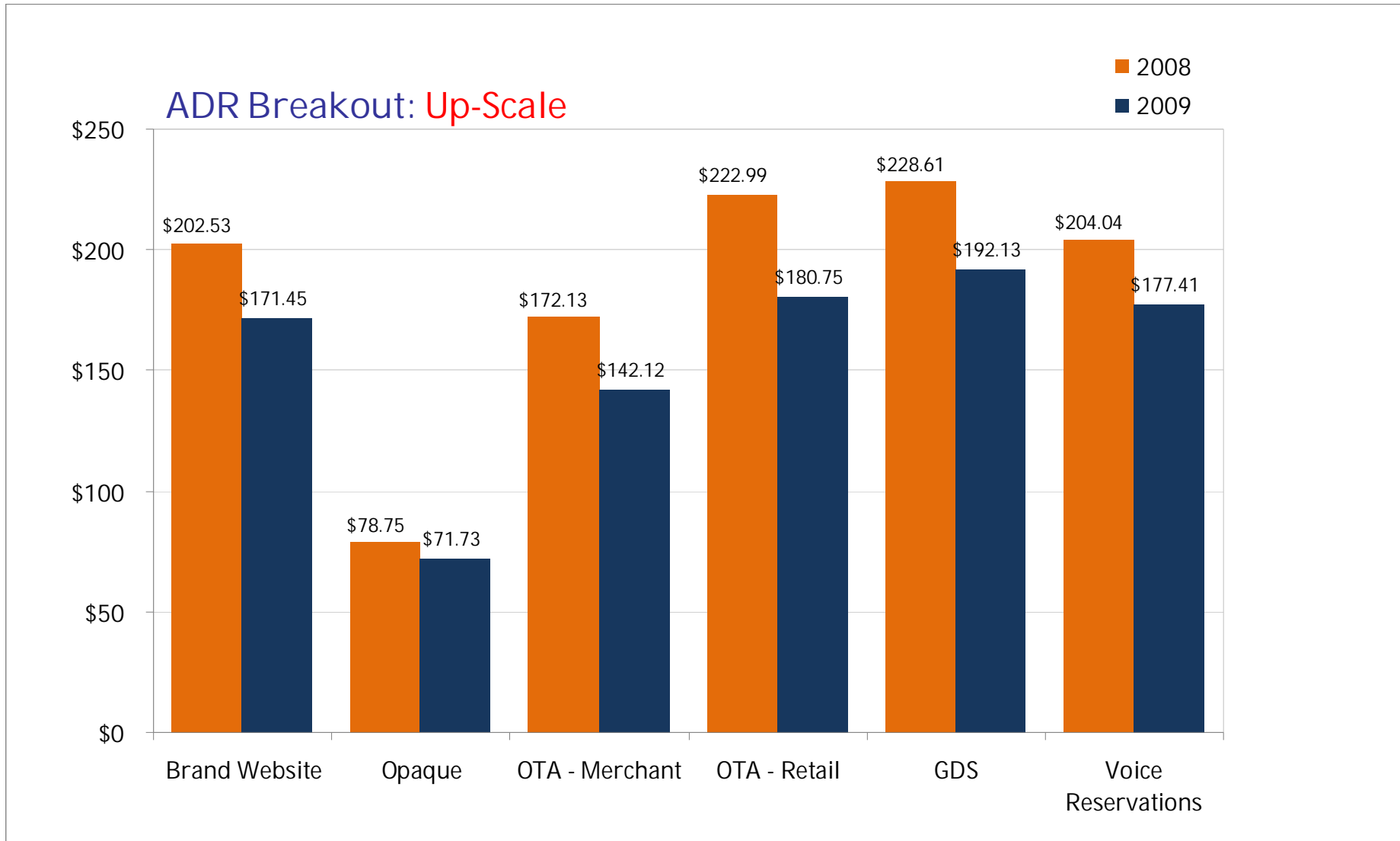
ADR by Channel and Product Class



ADR by Channel and Product Class



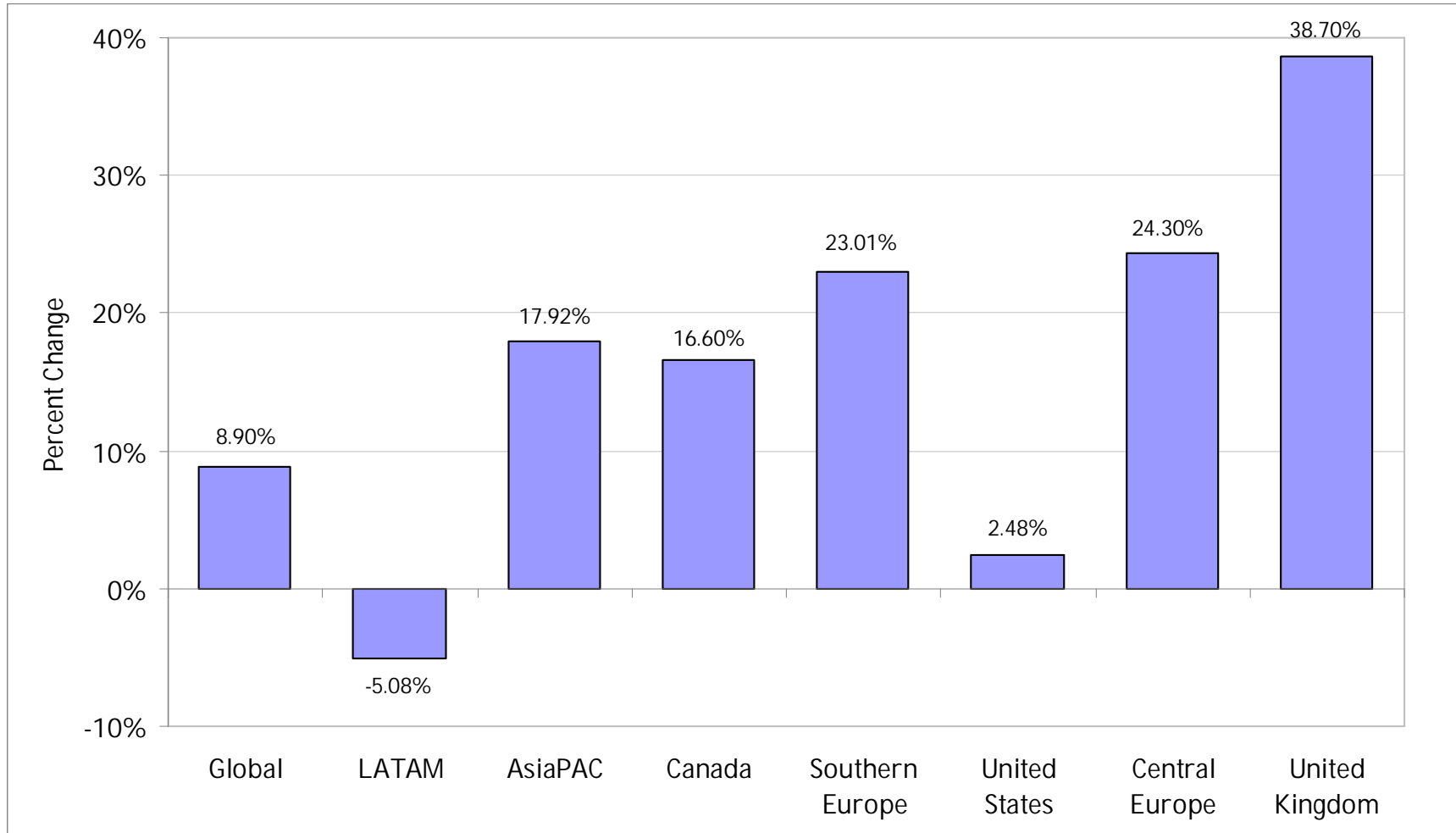
ADR by Channel and Product Class



Trend : Web Direct For Independents



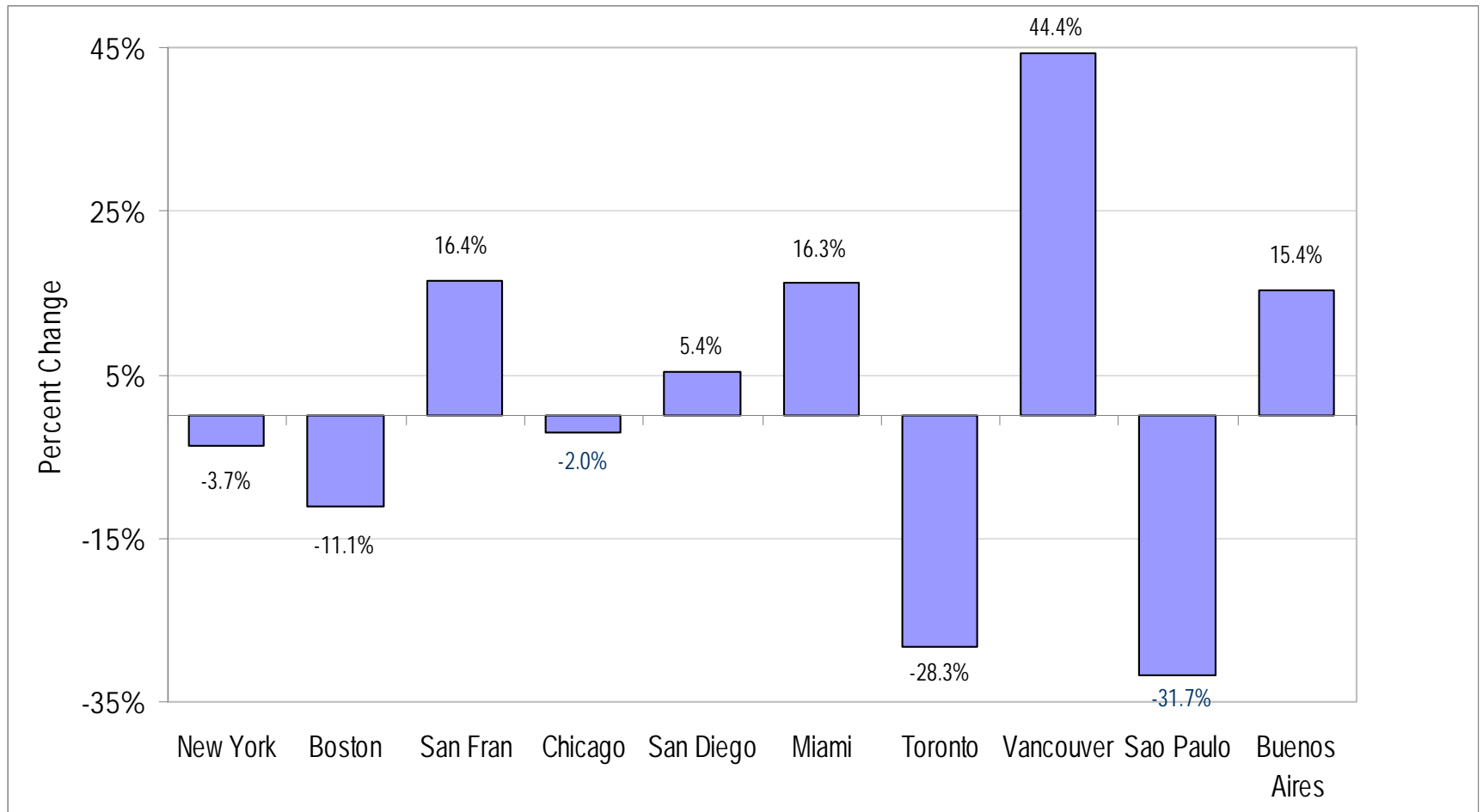
Direct Web Booking Performance Year to Date



Trend : Web Direct For Independents



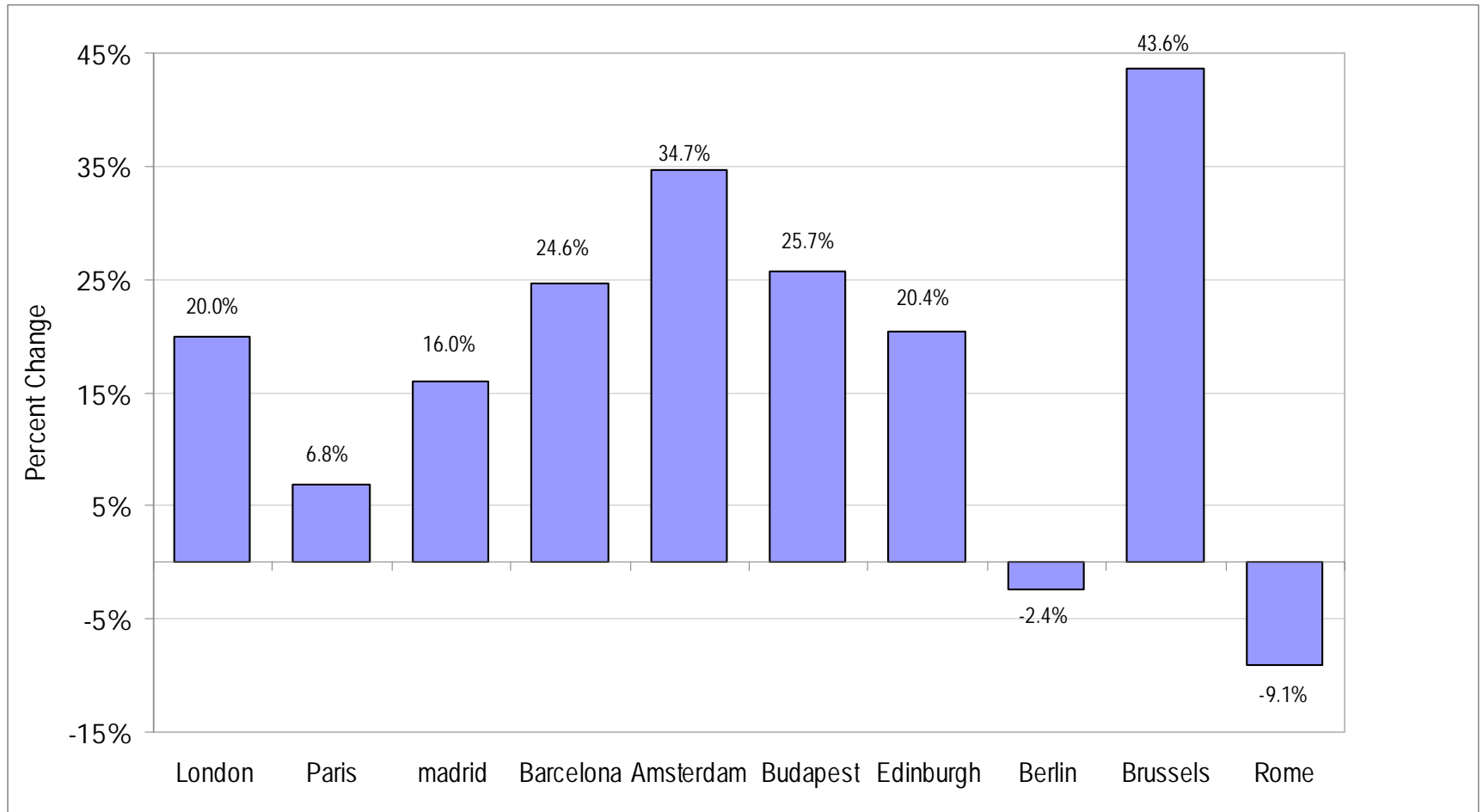
Direct Web Booking Performance for Q1 2009 Americas



Trend : Web Direct For Independents



Direct Web Booking Performance for Q1 2009 Europe



Trend : Web Direct For Independents



Direct Web Booking Performance for Q1 2009 Asia Pacific



Local market conditions vary greatly. It's imperative to fully analyze your unique source and destinations markets.

Regions of stabilizing economic conditions are creating local market segments of incremental opportunity.

Multi-segment lead rate strategies have become competitive differentiators.

Enriched visual content is increasingly important in maintaining a competitive web presence.

1

Focus on Competitive Strengths

- Know your local market; inside and out
- Vigilantly monitor competitive activity
- Focus rate management in thirty day increments

2

Think Like a Consumer

- What “winning rate” will get them through your door?
- Segment your lead rate strategy within each major affinity

3

Opportunistic Perseverance

- 50% of your pricing decisions will determine 90% of your profitability
- Resist the temptation to uniformly lower pricing, especially when responding to competitive activity

4

Recovery Comes in Small Wins

- Which of your market segments will recover first?
- What associations and affiliations are gaining traction within your local market?
- Is your website prepared for mobile communications?

Thank You