

# TRAVELCLICK MARKET ALERT

Middle East, Northern Africa, and Southern Africa



JUNE 2009

## REGION STILL STRONG COMPARED TO THE GLOBAL MARKET

The Middle East/Africa region suffered declines in all three key measurements in year-over-year (YOY) results for June 2009. The region's occupancy dropped 11.7% to 59.6%; average daily rate (ADR) decreased 2.8% to US\$138.23; and revenue per available room (RevPAR) decreased 14.2% to US\$82.38. The region experienced a 14.2% RevPAR drop in June, the lowest decrease of all regions, followed by the Americas, Asia/Pacific, and Europe.

*As the travel industry continues to suffer as a result of the global economic crisis, TravelCLICK hotels have outperformed the market by 130% in revenue month-to-date (MTD) and 70% year-to-date (YTD).*

## Overall Market versus TravelCLICK Hotels, Month-to-Date

Overall	-14.20%
TravelCLICK	4.23%

## REVPAR PERFORMANCE HIGHLIGHTS, MIDDLE EAST AND AFRICA

### Month-to-Date

#### Overall Middle East and Africa Performance in Revenue

TravelCLICK iHotelier customers in all regions are driving positive YOY growth in revenue, while the market reflects negative growth across regions. Overall growth is almost 20 percentage points higher for the region than the overall market. TravelCLICK properties in Northern Africa reported the highest level of positive YOY growth in a declining market, with a 53.30% increase.

#### Top-performing Countries in Revenue

TravelCLICK properties have outperformed the market in Egypt, Turkey, and the United Arab Emirates (see chart). Growth in Egypt was highest for TravelCLICK hotels at 125%, more than 140% higher than the global market. Turkey turned the corner with slight growth of 4% compared to a significant decline for the market of 32%. In YOY comparisons, although all markets experienced a decline in June, TravelCLICK hotels performed significantly above market levels, with Egypt increasing 125.15%.

#### Top-performing Markets in Revenue

In Dubai, TravelCLICK's iHotelier hotels outperformed the market across the board for all key metrics—ADR, occupancy, and revenue. These

hotels leveraged competitive advantage into lower rates of decline for occupancy and ADR, enabling them to perform five percentage points ahead of the overall market in revenue.

## Year-to-Date

#### Overall Middle East and Africa Performance in Revenue

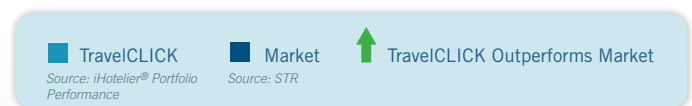
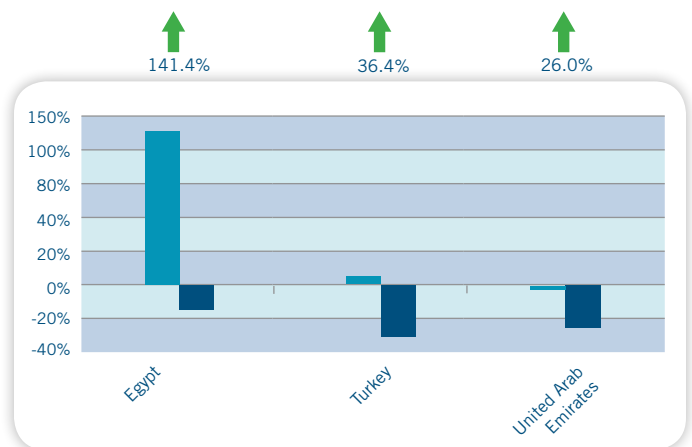
TravelCLICK properties continue to outperform the market in all regions, for both occupancy and revenue, recording positive YOY growth, while the market continues to decline. For the region, the market is down 12.2% in occupancy and 14.8% in revenue, while TravelCLICK hotels reported +16.5 and -4.37%, respectively.

#### Top-performing Countries in Revenue

TravelCLICK properties have outperformed the market in all tracked countries in the region. Specifically, the highlight was Egypt, which experienced a 54.76% increase in occupancy YTD compared to the market growth of -17.40%, revenue increase of 47.37% compared to the market decline of 16.4%, while reducing ADR by only 4.77%.

## TRAVELCLICK HOTELS OUTPERFORM THE MARKET

Chart 1. Middle East and Africa, Top Countries Revenue Percent Change, Month-to-Date.



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