

TRAVELCLICK® MARKET ALERT

Middle East, Northern Africa, and Southern Africa



JULY 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 July 2009. The region's occupancy dropped 11.0% to 62.0%; average daily rate (ADR) decreased 3.0% to US\$135.02; and revenue per available room (RevPAR) decreased 13.6% to US\$83.77. Overall, the region reported mixed performance in July, with the Middle East improving on June's data and Southern Africa showing significantly worse figures.

As the travel industry continues to suffer as a result of the global economic crisis, TravelCLICK® hotels have outperformed the market by 287% in revenue month-to-date (MTD) and 58% year-to-date (YTD).

Overall Market versus TravelCLICK Hotels, Month-to-Date

Overall	-13.60%
TravelCLICK	25.37%

REVPAR PERFORMANCE HIGHLIGHTS, MIDDLE EAST AND AFRICA

Month-to-Date

Overall Middle East and Africa Performance in Revenue

TravelCLICK iHotelier® customers in most regions are driving positive YOY growth in revenue, while the market reflects negative growth across regions. Overall growth is 39 percentage points higher for the region than the overall market. TravelCLICK properties in Southern Africa reported the highest level of positive YOY growth in a declining market, with a 92% increase.

Top-performing Countries in Revenue

TravelCLICK properties have outperformed the market in Turkey and the United Arab Emirates (UAE) (see chart). Growth in TravelCLICK hotels was highest for the UAE at 75%, more than 95 percentage points higher than the global market. Turkey turned in a slightly higher growth than last month with an 11% increase compared to a significant decline for the market of 29%.

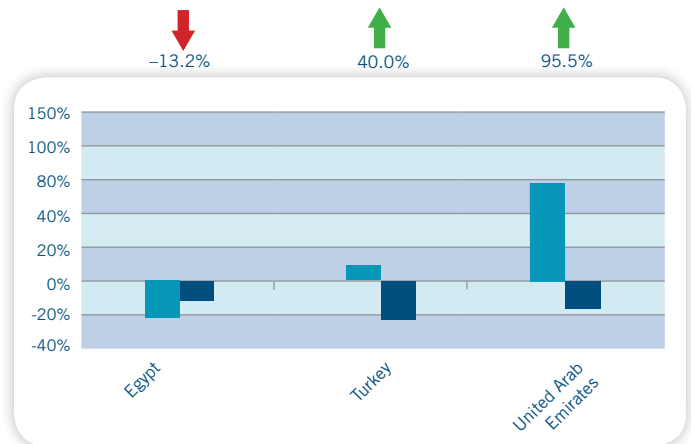
Top-performing Markets in Revenue

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

hotels leveraged competitive advantage into positive growth, enabling them to perform 77 percentage points ahead of the overall market in revenue, 43 points ahead in ADR, and 30 points ahead in occupancy.

TRAVELCLICK HOTELS OUTPERFORM THE MARKET

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



TravelCLICK

Source: iHotelier® Portfolio Performance

Market

Source: STR



TravelCLICK Outperforms Market

Year-to-Date

Overall Middle East and Africa Performance in Revenue

TravelCLICK properties continue to outperform the market in all regions, in both occupancy and revenue, achieving 9 percentage points higher YOY growth compared to the declining market. For the region, the market is down 12.0% in occupancy and 15.1% in revenue, while TravelCLICK hotels reported performance of 25.4 and 8.7 points higher, respectively.

Top-performing Countries in Revenue

TravelCLICK properties have outperformed the market in all tracked countries in the region for occupancy. Specifically, the highlight was Egypt, which experienced a 50.4% increase in occupancy YTD compared to the market growth of -16.3%, and a revenue increase of 37.4% compared to the market decline of 16.7%.

To learn more about how iHotelier can help you achieve better results, email us at info@travelclick.net or visit www.travelclick.net.

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