

# TRAVELCLICK® MARKET ALERT

United States



SEPTEMBER 2009

## DECLINES LESSEN FOR THE REGION

The United States region posted year-over-year (YOY) decreases in all three key metrics for September 2009, but with lower rates of decline for both occupancy and revenue per available room. In YOY measurements, occupancy fell 6.3% to end the month at 56.7%. Average daily rate (ADR) dropped 10.2% to finish the month at US\$96.67. Revenue per available room (RevPAR) for the month decreased 15.9% to finish at US\$54.78.

*With improving performance in recent months, TRAVELCLICK® hotels surpass the market, outperforming by 23% in revenue month-to-date (MTD) and 7% in revenue year-to-date (YTD).*

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

Overall	-15.9%
TRAVELCLICK	-12.3%

## REVPAR PERFORMANCE HIGHLIGHTS, UNITED STATES

### Month-to-Date

#### Top-performing States in Revenue

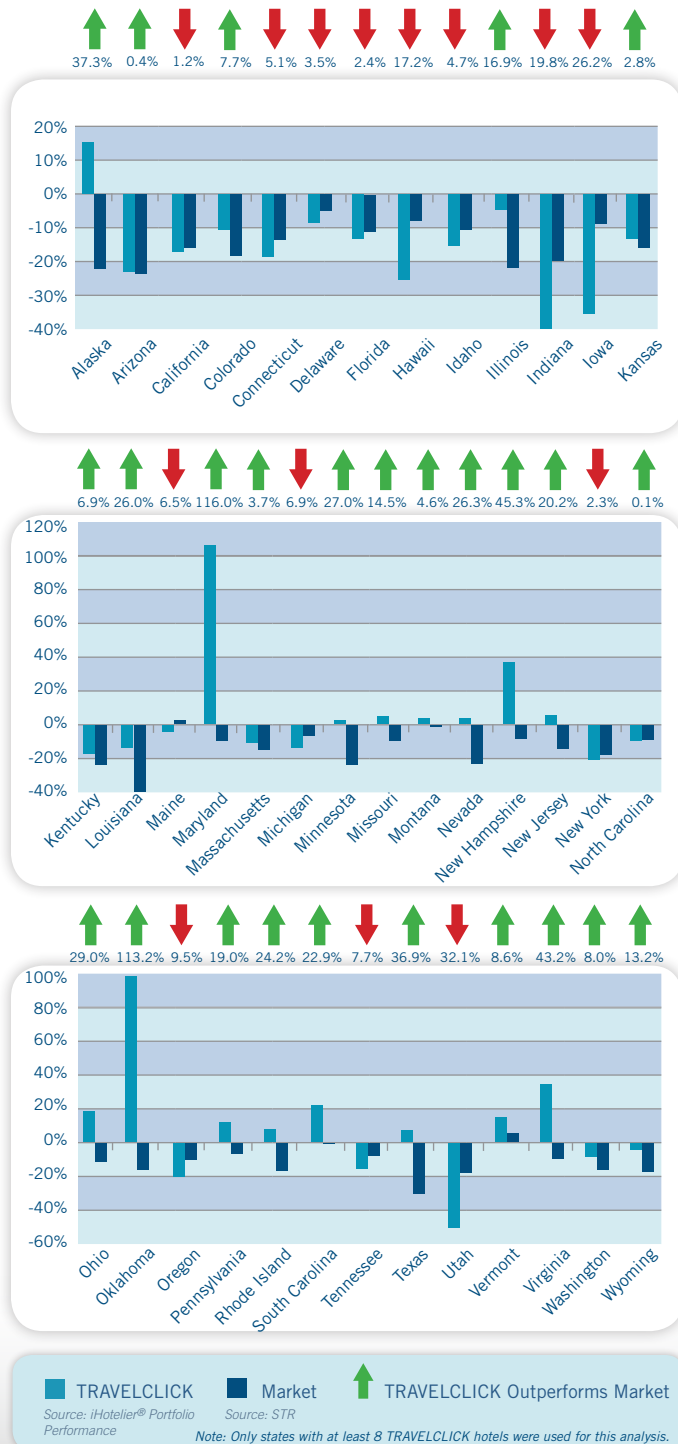
TRAVELCLICK properties outperformed the market in 64% of tracked states in September: Alaska, Arizona, Colorado, Illinois, Kansas, Kentucky, Louisiana, Maryland, Massachusetts, Minnesota, Missouri, Montana, Nevada, New Hampshire, New Jersey, North Carolina, Ohio, Oklahoma, Pennsylvania, Rhode Island, South Carolina, Texas, Vermont, Virginia, Washington, and Wyoming (see Chart 1). Plus, TRAVELCLICK's properties in Alaska, Maryland, Minnesota, Missouri, Montana, Nevada, New Hampshire, New Jersey, Ohio, Oklahoma, Pennsylvania, Rhode Island, South Carolina, Texas, and Virginia returned positive YOY growth for September while the market declined for the same period. That is almost 40% of states within TRAVELCLICK's portfolio reporting positive growth.

#### Top-performing Markets in Revenue

TRAVELCLICK properties have outperformed the market in seven major markets, including Anaheim-Santa Ana, Boston, Chicago, New Orleans, Norfolk-Virginia Beach, Seattle, and Washington, D.C. Continuing regional strength, TRAVELCLICK's Anaheim-Santa Ana and New Orleans portfolios reported positive YOY growth, while these markets recorded losses (see Chart 2).

## TRAVELCLICK HOTELS OUTPERFORM THE MARKET

Chart 1. U.S., Top States Revenue Percent Change, Month-to-Date.



## Knowledge Is Power™ Series

TRAVELCLICK® Global Offices



Baltimore, MD USA



Barcelona, Spain



Chicago, IL USA



Dubai, UAE



Houston, TX USA



Melbourne, Australia



Phoenix, AZ USA



Shanghai, China



Tokyo, Japan

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SEPTEMBER 2009

## Year-to-Date

### Overall United States Performance in Revenue

TRAVELCLICK iHotelier® portfolio hotels delivered better performance than the market across the overall region for YTD September.

### Top-performing States in Revenue

TRAVELCLICK properties outperformed the market in 80% of tracked states in YTD September: Alaska, California, Delaware, Florida, Idaho, Illinois, Iowa, Kansas, Louisiana, Maine, Maryland, Massachusetts, Minnesota, Missouri, Montana, Nevada, New Hampshire, New Jersey, North Carolina, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, Tennessee, Texas, Virginia, Washington, and Wyoming. Plus, TRAVELCLICK's properties in Delaware, Maryland, Minnesota, Missouri, Nevada, New Hampshire, New Jersey, Ohio, Oklahoma, Rhode Island, Tennessee, and Virginia returned positive YTD growth for September while the market declined for the same period.

### Top-performing Markets in Revenue

TRAVELCLICK properties have outperformed the market in 10 major markets, including Anaheim-Santa Ana, Boston, Chicago, Miami-Hialeah, New Orleans, New York, Norfolk-Virginia Beach, San Diego, Seattle, and Washington, D.C. Continuing regional strength, TRAVELCLICK's Anaheim-Santa Ana and Norfolk-Virginia Beach area portfolios reported positive YOY growth, while these markets recorded losses.

## MARKET HIGHS AND LOWS, MONTH-TO-DATE

### States

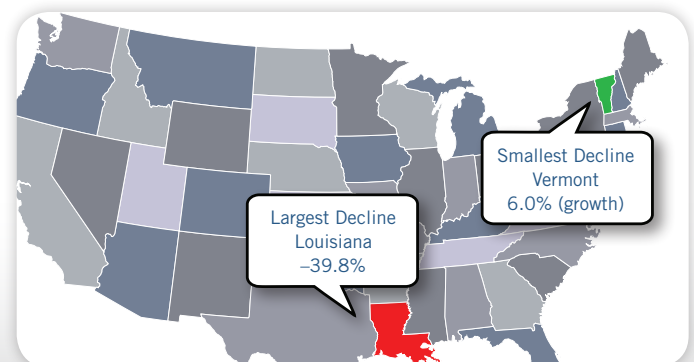
Smallest Decline: Vermont 6.0% (growth)  
Largest Decline: Louisiana -39.8%

### Cities

Smallest Decline: Norfolk-Virginia Beach 5.5% (growth)  
Largest Decline: New Orleans -38.3%

## TRAVELCLICK HOTELS OUTPERFORM THE MARKET

Chart 2. U.S., Top Cities Revenue Percent Change, Month-to-Date.



To learn more about how iHotelier® can help you achieve better results, email us at [info@travelclick.net](mailto:info@travelclick.net) or visit [www.travelclick.net](http://www.travelclick.net).

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