

TRAVELCLICK MARKET ALERT

Middle East, Northern Africa and Southern Africa



MAY 2009

REGION STILL STRONG COMPARED TO THE GLOBAL MARKET

Although the Middle East/Africa region has seen some spectacular year-over-year (YOY) decreases, it is still strong compared with the other global regions. Middle East/Africa has the lowest revenue per available room (RevPAR) decline and the highest actual RevPAR for the month of May and May year-to-date (YTD), compared with Asia/Pacific, Americas, and Europe. Hoteliers seem to be doing a better job at maintaining their average room rates in the face of a steep drop in demand.

Even in these challenging times, TravelCLICK hotels continue to buck the trend, outperforming the market by 59% in revenue month-to-date (MTD) and 92% YTD.

Overall Market versus TravelCLICK Hotels, Month-to-Date

Overall	-17%
TravelCLICK	-7.05%

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. TravelCLICK properties in Northern and Southern Africa continue to report positive YOY growth in a declining market.

Top-performing Countries in Revenue

TravelCLICK properties have outperformed the market in Egypt, Turkey, and the United Arab Emirates (see Chart 1).

Top-performing Markets in Revenue

TravelCLICK properties drove positive YOY growth in occupancy for May, up 6.85%, while the market recorded falling occupancy levels, down 11.5% YOY. The growth in occupancy was ADR driven, with TravelCLICK properties realizing a larger loss in ADR than the market.

The increase in occupancy was however enough to offset the drop in ADR, and TravelCLICK's properties finished -7.05% behind in Revenue YOY versus the Market which posted a decline of -17%.

Year-to-Date

Overall Middle East and Africa Performance in Revenue

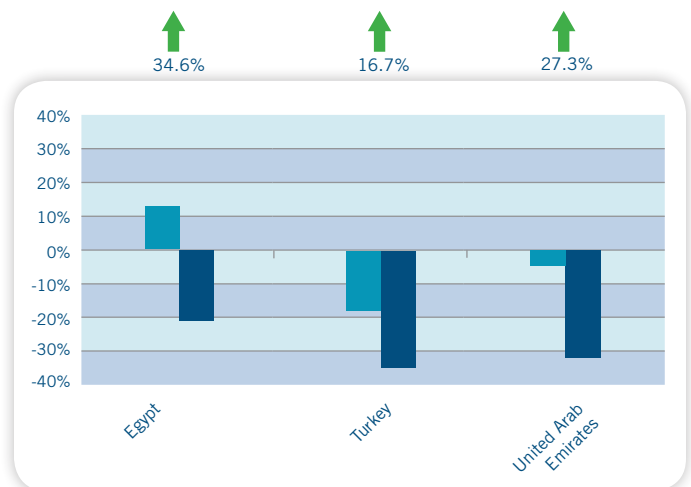
TravelCLICK properties continue to outperform the market in all regions, recording positive YOY growth, while the market continues to decline.

Top-performing Countries in Revenue

TravelCLICK properties have outperformed the market in all regions.

TRAVELCLICK HOTELS OUTPERFORM THE MARKET

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



TravelCLICK
Source: iHotelier® Portfolio Performance

Global
Source: STR

↑ TravelCLICK Outperforms Market

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