

# **Hotel Electronic Distribution Network Association**

**New York City**

**April 12<sup>th</sup>, 2005**

**Marriott Marquis**

**WELCOME!**



# Agenda

1. **Welcome to HEDNA – Organizational Overview and Code of Conducts**
2. **Individual Introductions**
3. **Market and Distribution Trends by TravelCLICK, and Smith Travel Research**
4. **GDS/IDS Trends by Sabre**
5. **GDS Tutorial**
6. **Travel Search Sites (Meta Search) discussion**
7. **HEDNA Collaboration Committees**
8. **Closing Statements**

# **HEDNA's Mission**

**To increase hotel industry revenues and profitability from electronic distribution channels and to be the foremost travel industry association advancing hotel electronic distribution**



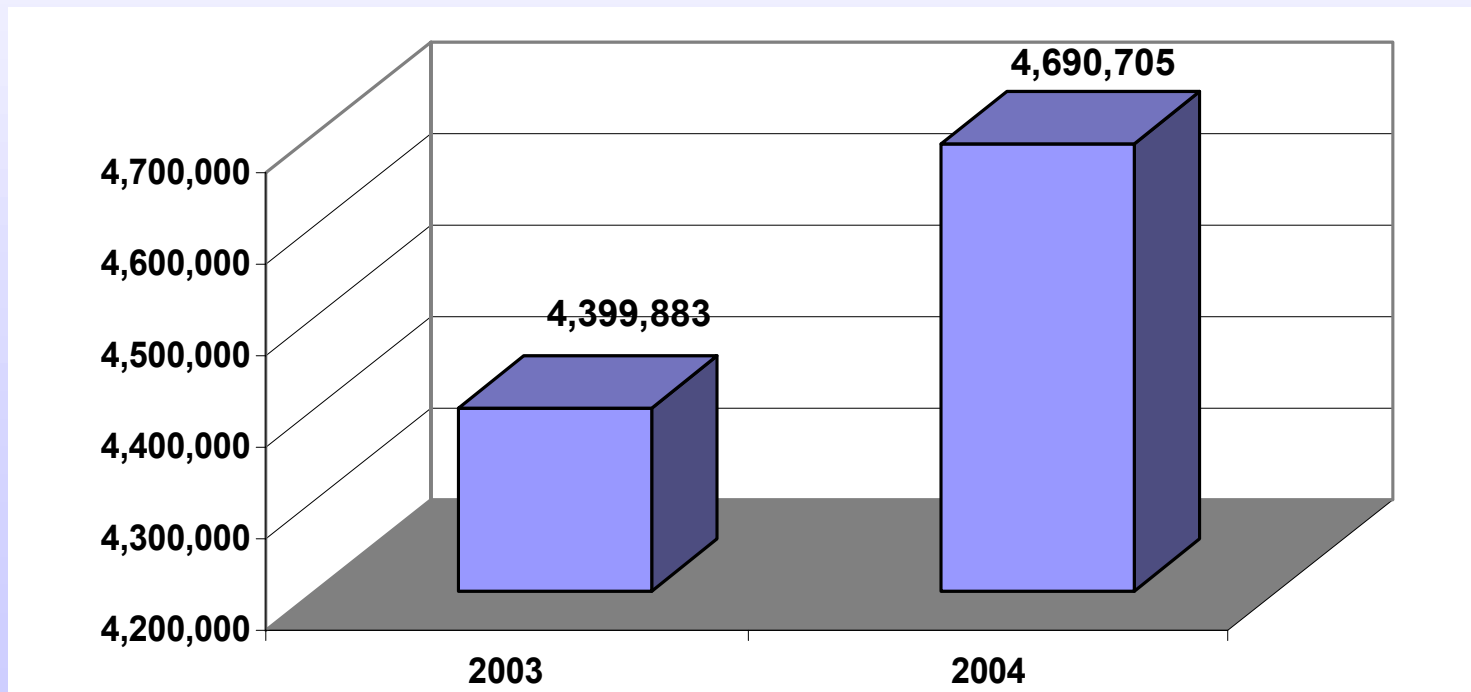
# **New York City Market Trends**

## **TravelCLICK and Smith Travel Research**

# Total Room Nights – New York Market

New York has experienced an increase of **6.6%** year over year in room nights

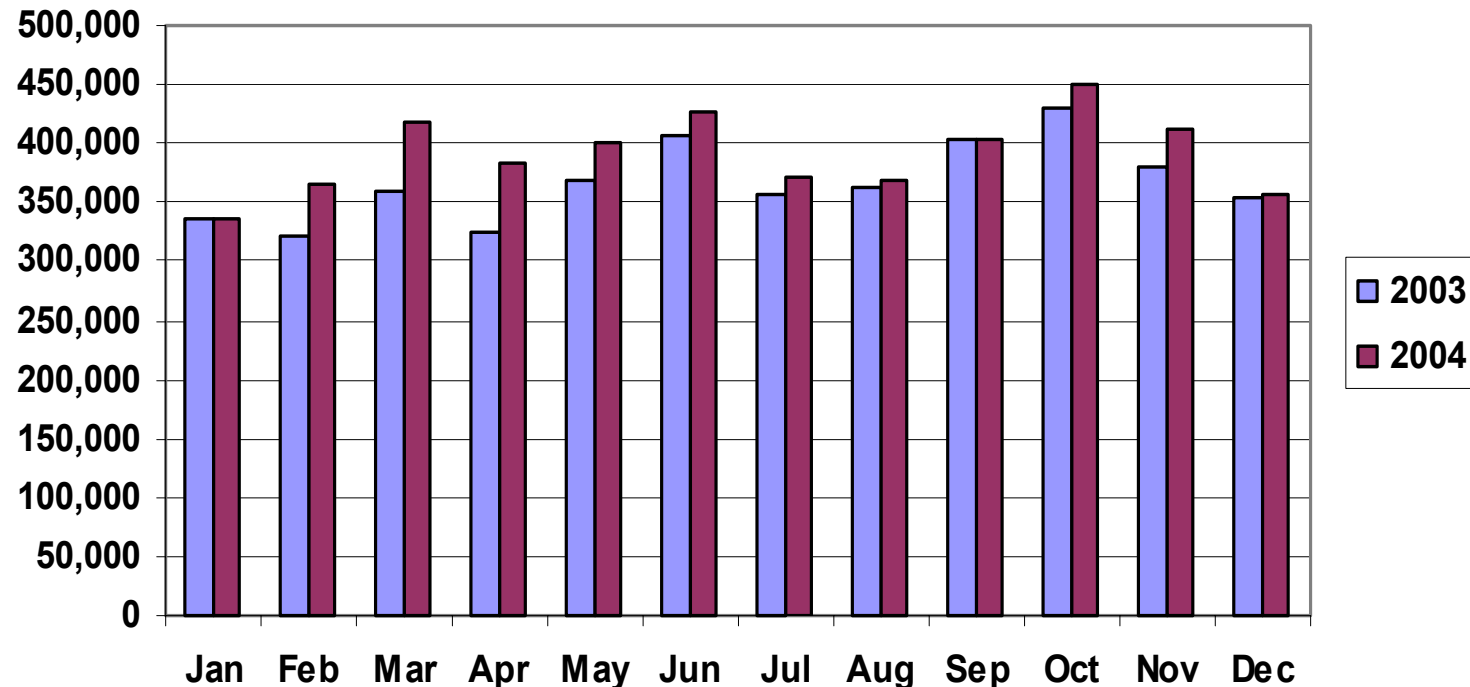
Total Room Nights  
January - December  
2003 vs. 2004



Based on data from TravelCLICK's Proprietary Database

# Room Nights – New York Market Month-by-Month View – 2003 vs. 2004

January – December  
2003 vs. 2004

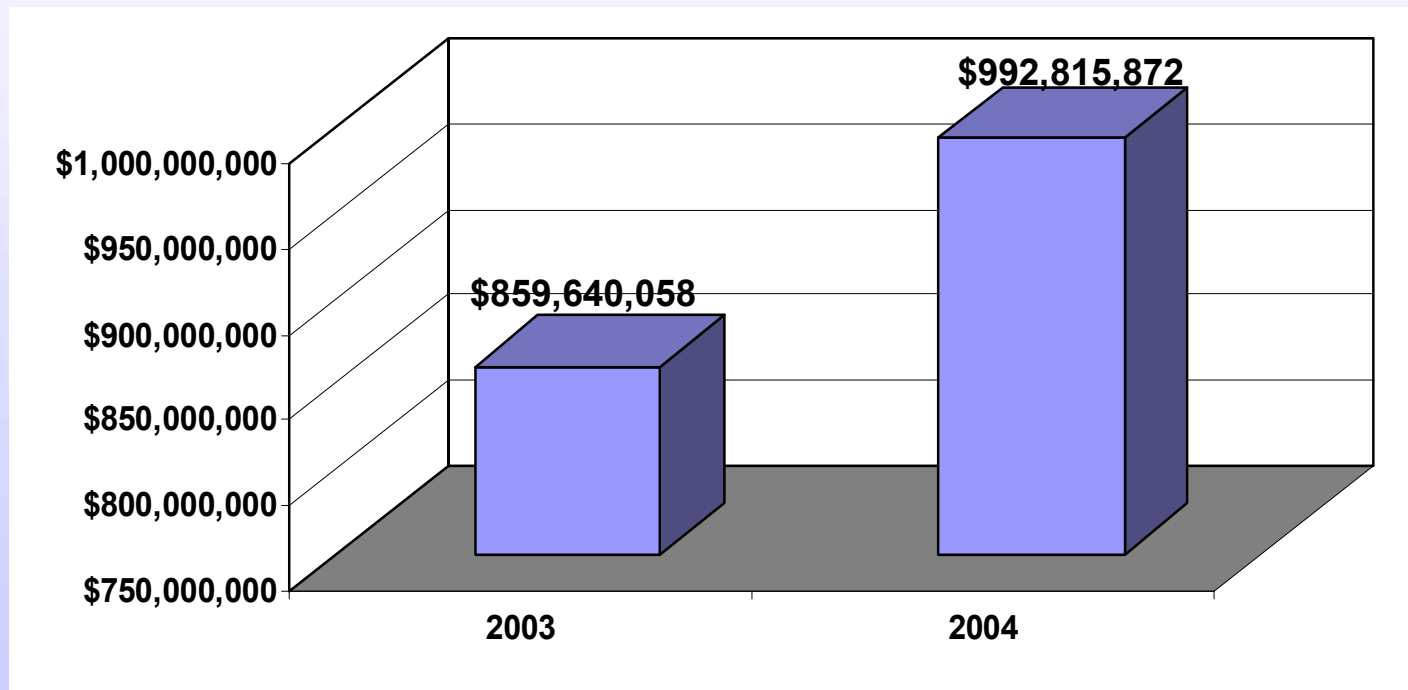


Based on data from TravelCLICK's Proprietary Database

# Total Revenue – New York Market

## Revenue for the New York Market is up 15.5% over 2003

Total Revenue  
2003 vs. 2004  
January – December

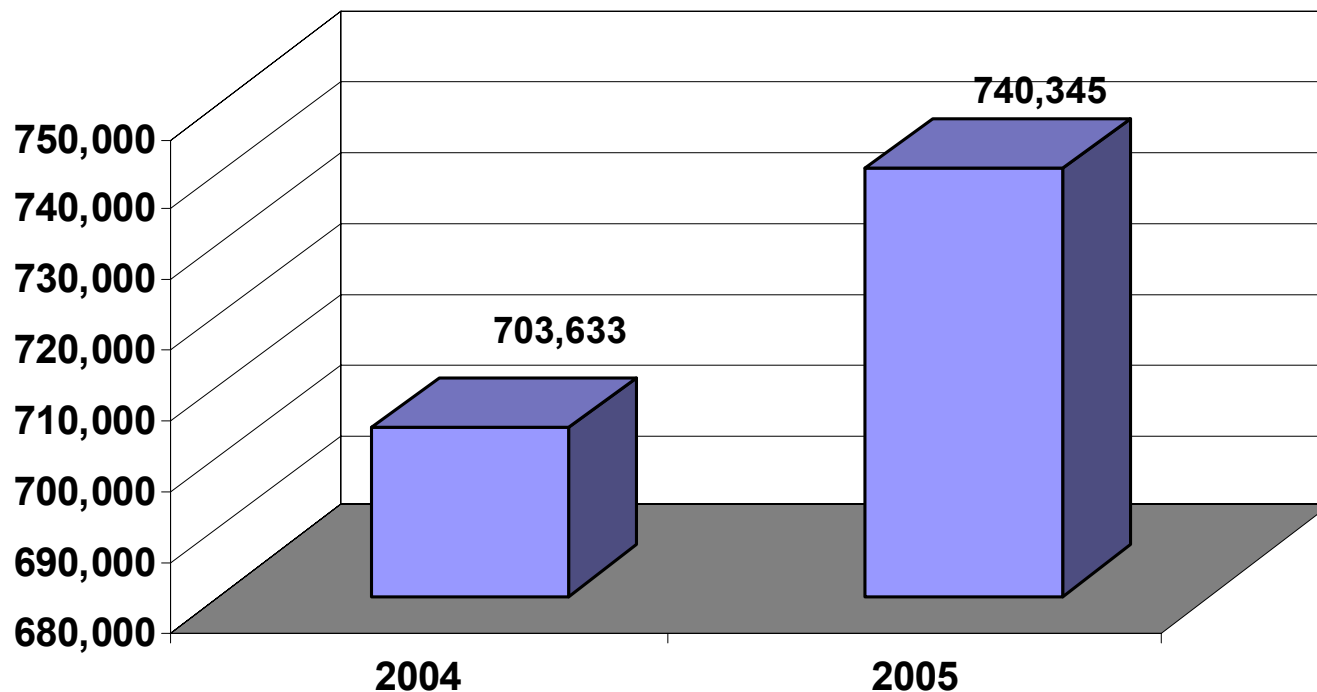


Based on data from TravelCLICK's Proprietary Database

# Total Room Nights – New York Market

New York has experienced an increase of 5.2% year over year in room nights

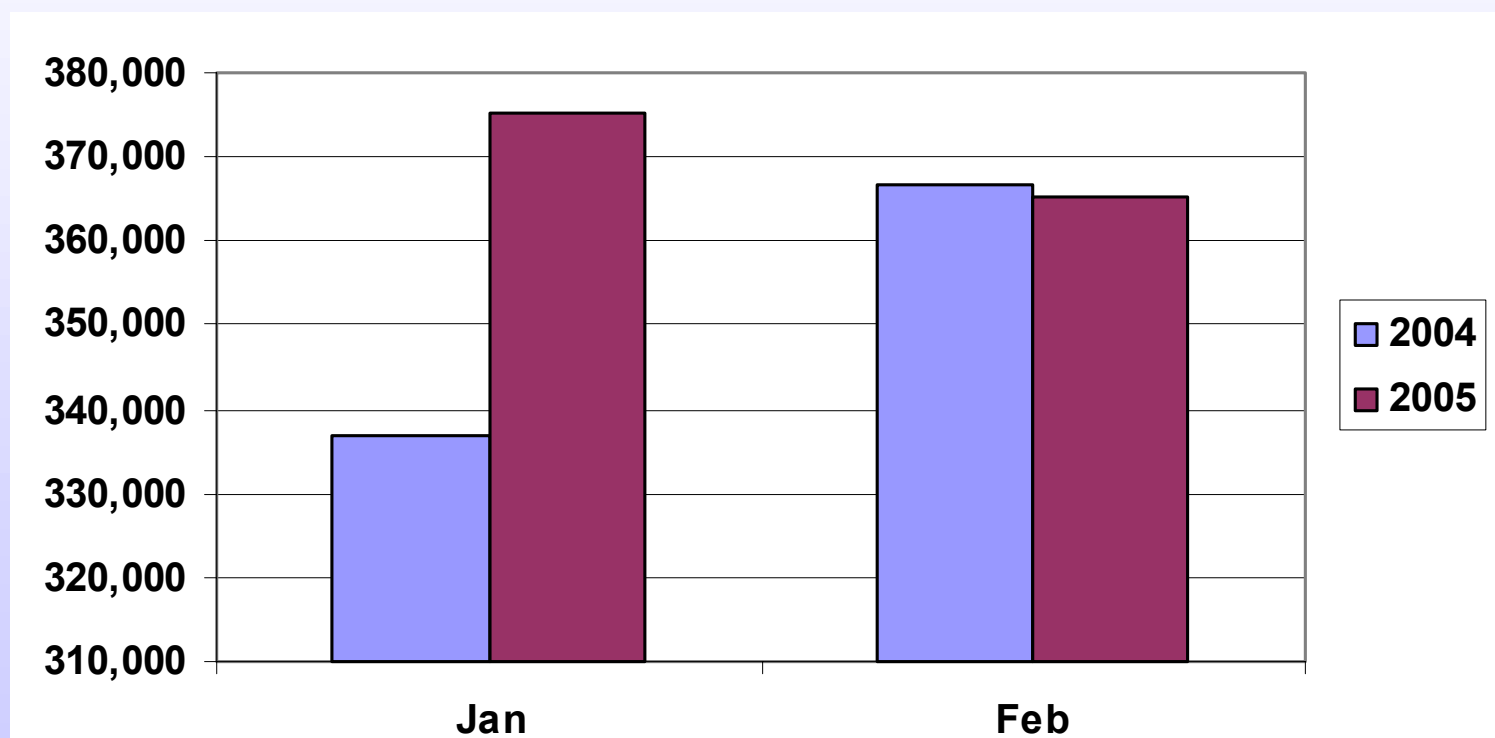
Total Room Nights  
January - February  
2004 vs. 2005



Based on data from TravelCLICK's Proprietary Database

# Room Nights – New York Market Month-by-Month View – 2003 vs. 2004

January - February  
2004 vs. 2005

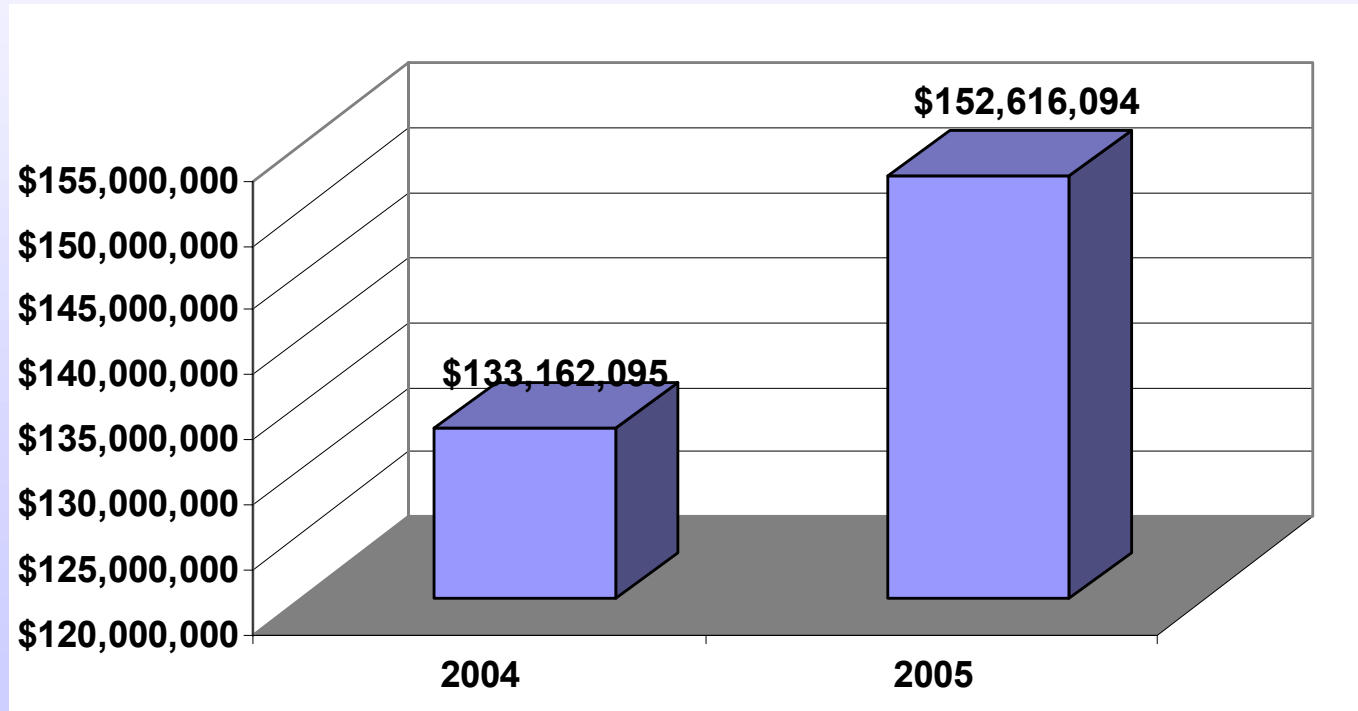


Based on data from TravelCLICK's Proprietary Database

# Total Revenue – New York Market

## Revenue for the New York Market is up 14.6% over 2004

Total Revenue  
January – February  
2004 vs. 2005

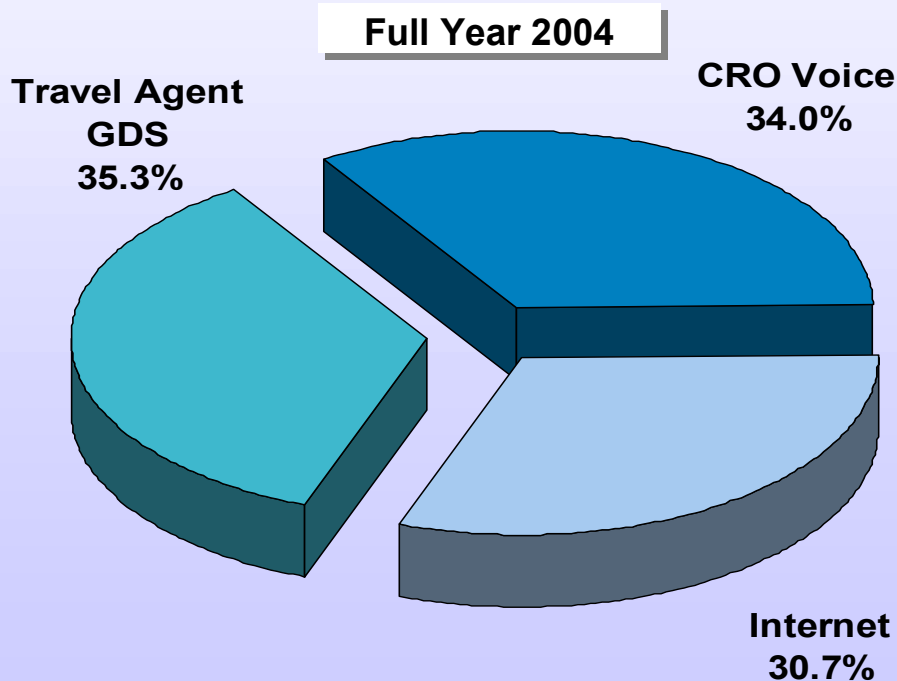


Based on data from TravelCLICK's Proprietary Database



# Composition of CRO Distribution

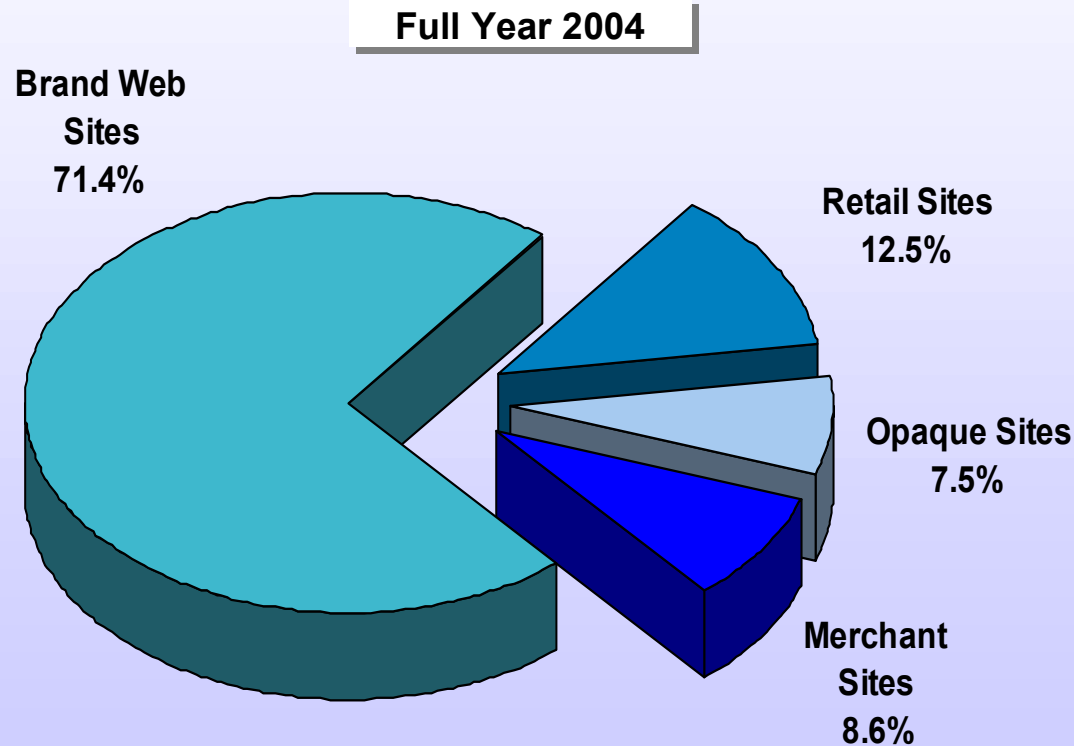
- Electronic channels are the primary source of CRO reservations at 66% of the total
- Internet bookings are 31% of CRO reservations



Based on data from TravelCLICK's Proprietary Database

# Sources of Internet Reservations\*

The Brands' own websites remained the major source of Internet reservations in 2004



\*Chart above only reflects reservations processed through a CRO. Hotels.com, property websites, and other Internet reservations not booked through the CRO are not included.

Based on data from TravelCLICK's Proprietary Database

# Top Third-Party Internet Sites

The top 10 sites as reported by eTRAK participants in order by 2004 reservations production:

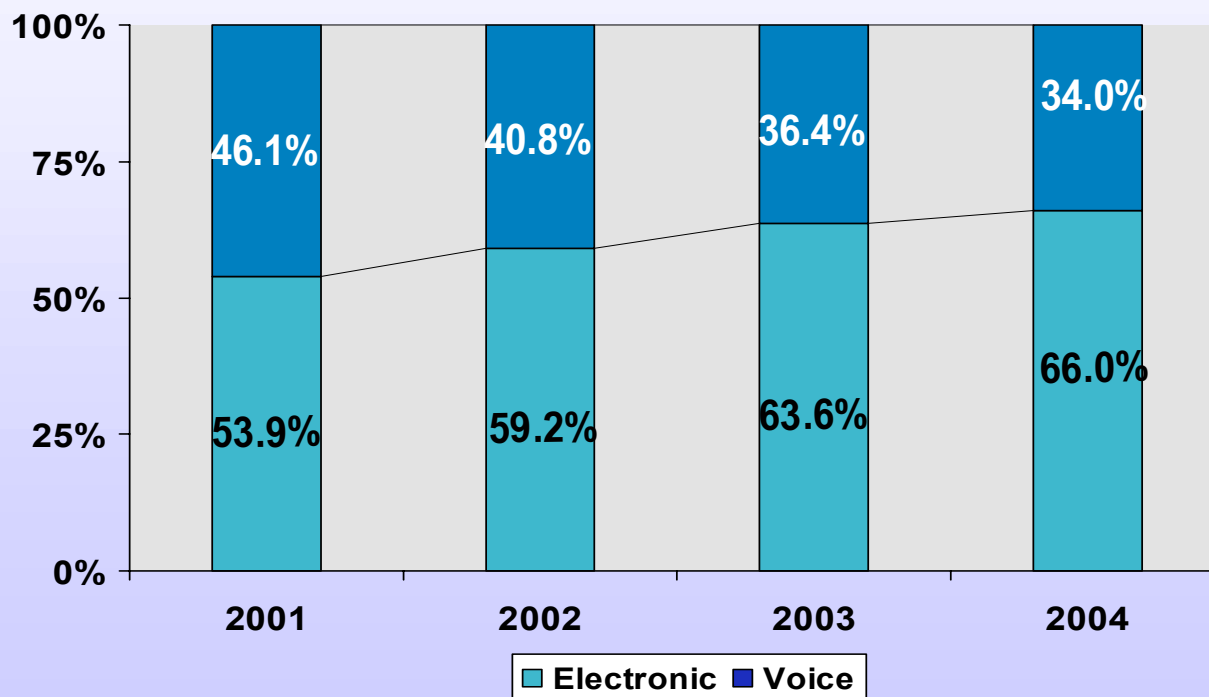
1. Priceline
2. Expedia Merchant
3. Expedia Retail
4. Hotels.com
5. Travelocity Retail
6. Hotwire
7. Travelocity Merchant
8. Orbitz Retail
9. TravelNow
10. Orbitz Merchant

*Based on data from TravelCLICK's Proprietary Database*



# Electronic Share of CRO Distribution

CRO distribution continued to shift in 2004 toward the more cost-efficient electronic channels



Based on data from TravelCLICK's Proprietary Database



# Electronic Distribution Statistics

Full Year '04 vs. Full Year '03

	Full Year '04 Booking	% Growth over Full Year '03
<b>Internet Total</b>	<b>25,691,776</b>	<b>22.8%</b>
<b>Brand Total</b>	<b>18,353,424</b>	<b>31.9%</b>
<b>Retail Total</b>	<b>3,205,044</b>	<b>-3.6%</b>
<i>Expedia</i>	767,273	15.5%
<i>Orbitz</i>	499,858	9.1%
<i>Travelocity</i>	358,899	-38.7%
<i>TravelNow</i>	376,403	16.6%
<i>USA Hotelguide</i>	188,437	-13.4%
<i>Other</i>	1,014,174	-5.7%
<b>Merchant Total</b>	<b>2,206,022</b>	<b>9.0%</b>
<i>Expedia</i>	781,344	5.0%
<i>Hotels.com</i>	673,330	-15.8%
<i>Lodging.com</i>	32,299	N/A
<i>Orbitz</i>	207,297	-0.5%
<i>Travelocity</i>	424,430	109.3%
<i>TravelWeb</i>	87,322	24.5%
<b>Opaque Total</b>	<b>1,927,286</b>	<b>16.0%</b>
<i>Hotwire</i>	427,657	14.1%
<i>Priceline</i>	1,499,629	16.6%
<b>GDS Total</b>	<b>29,502,865</b>	<b>5.0%</b>

Based on data from TravelCLICK's Proprietary Database

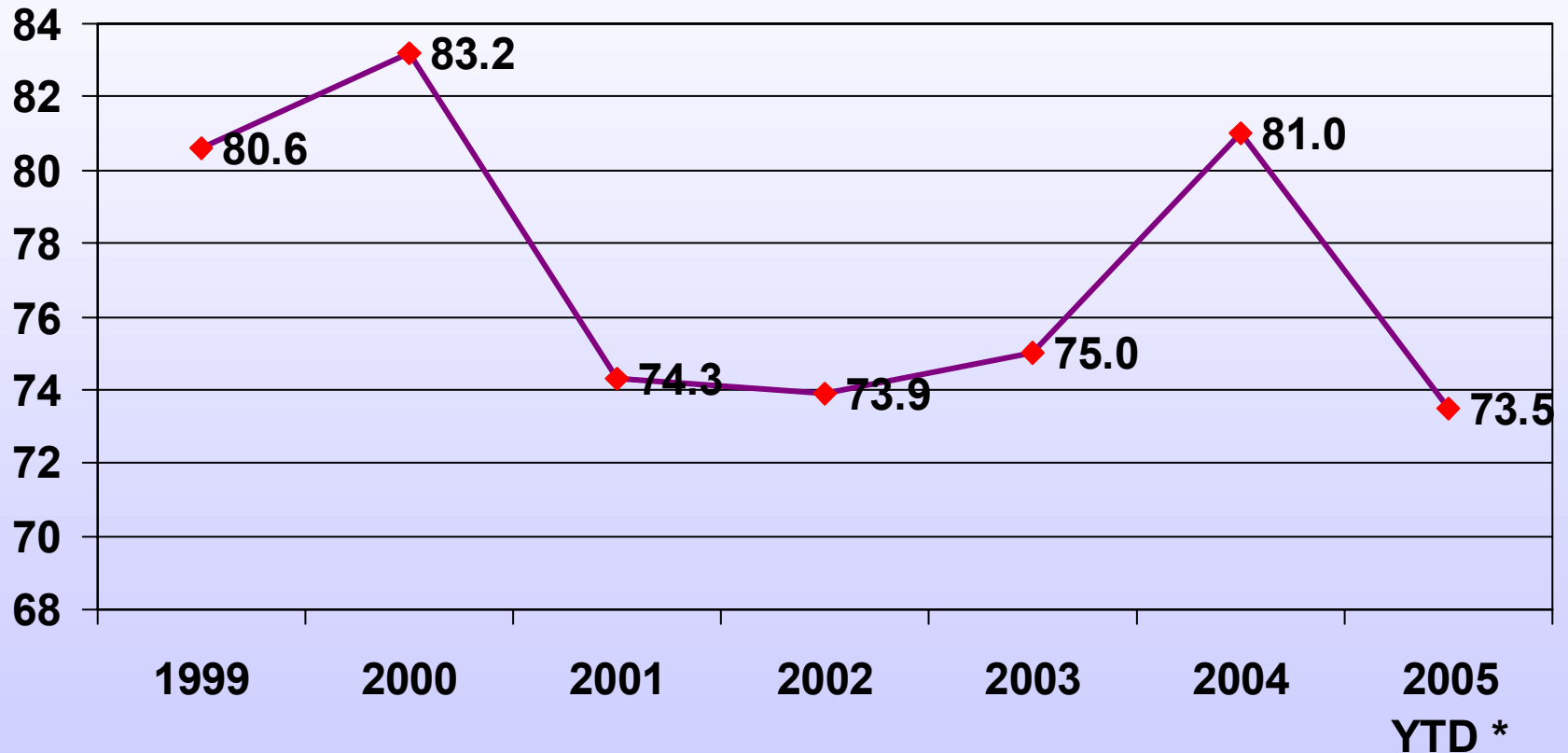




**Smith Travel Research  
New York City  
1999-2005**

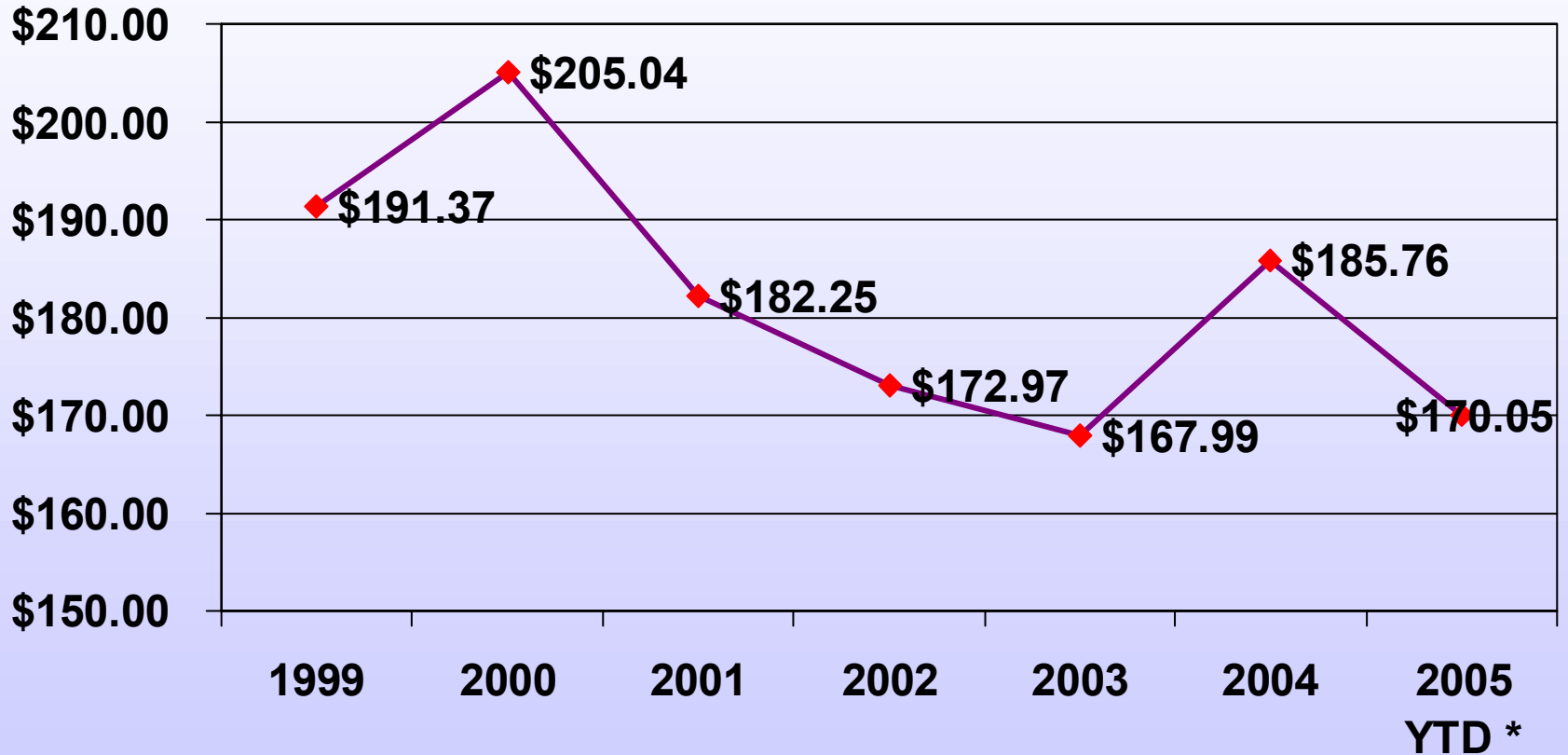
- 1. Occupancy**
- 2. ADR**
- 3. RevPAR**
- 4. Supply and Demand**

# NYC-Occupancy Percentage



\* YTD as of Feb. 2005. YTD Feb. 2004 was 68.0%

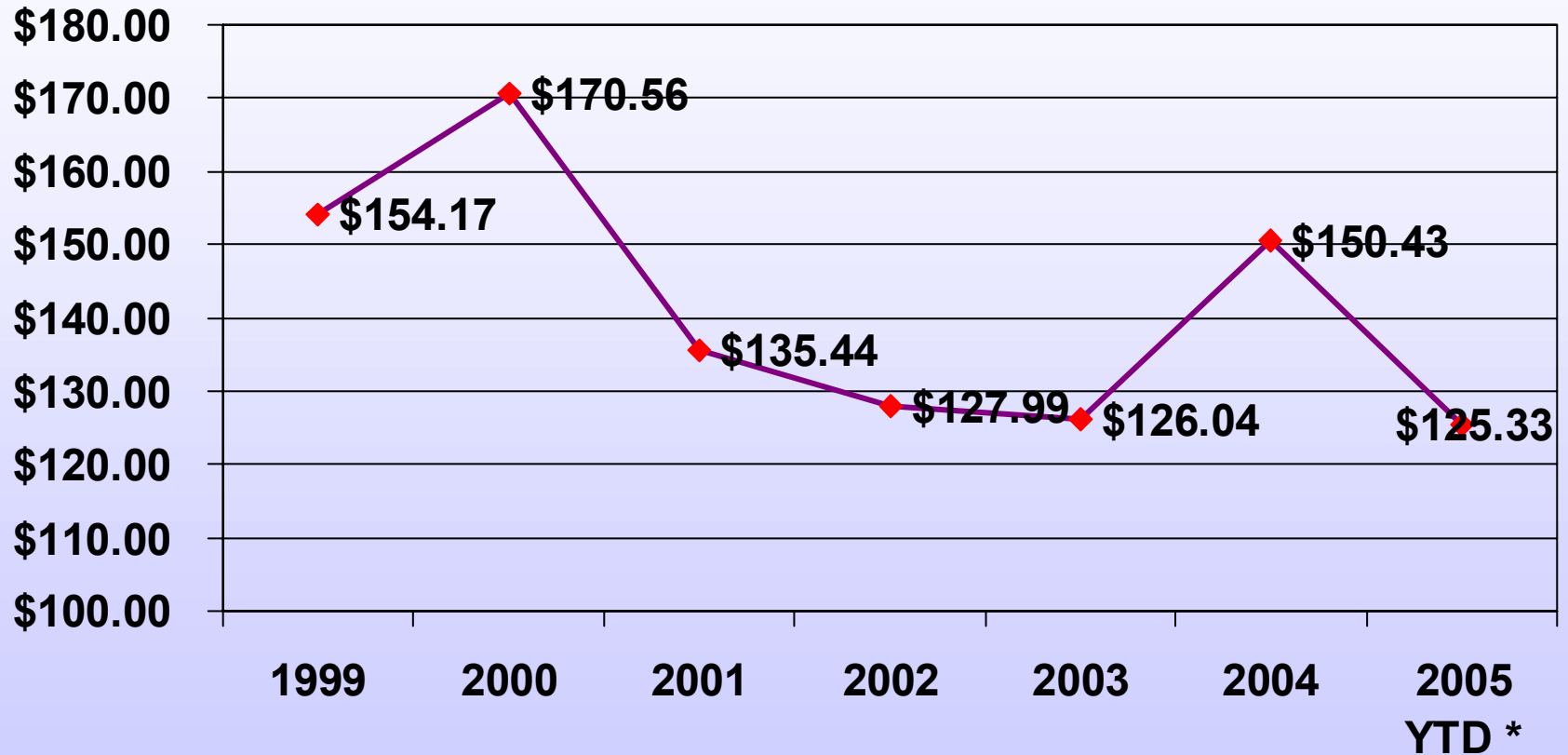
# NYC – Average Daily Rate



\* YTD as of Feb. 2005. YTD Feb. 2004 was \$158.17



# NYC - RevPAR



\* YTD as of Feb. 2005. YTD Feb. 2004 was \$107.33



# NYC – Supply and Demand Percentage Change

