

Hotel Electronic Distribution Network Association

Toronto Local Learning Session

October 24, 2005

Fairmont Royal York Hotel

WELCOME!

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Agenda

1. **Welcome to HEDNA – Organizational Overview and Code of Conduct**
2. **Individual Introductions**
3. **Market and Distribution Trends by TravelCLICK**
4. **IDS Trends by ???**
5. **Networking Lunch**
6. **GDS Tutorial by ???**
7. **TravelSearch Presentation by ???**
8. **HEDNA Collaboration Committee Update**
9. **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



US, Canada, Ontario and Toronto-area Market Trends

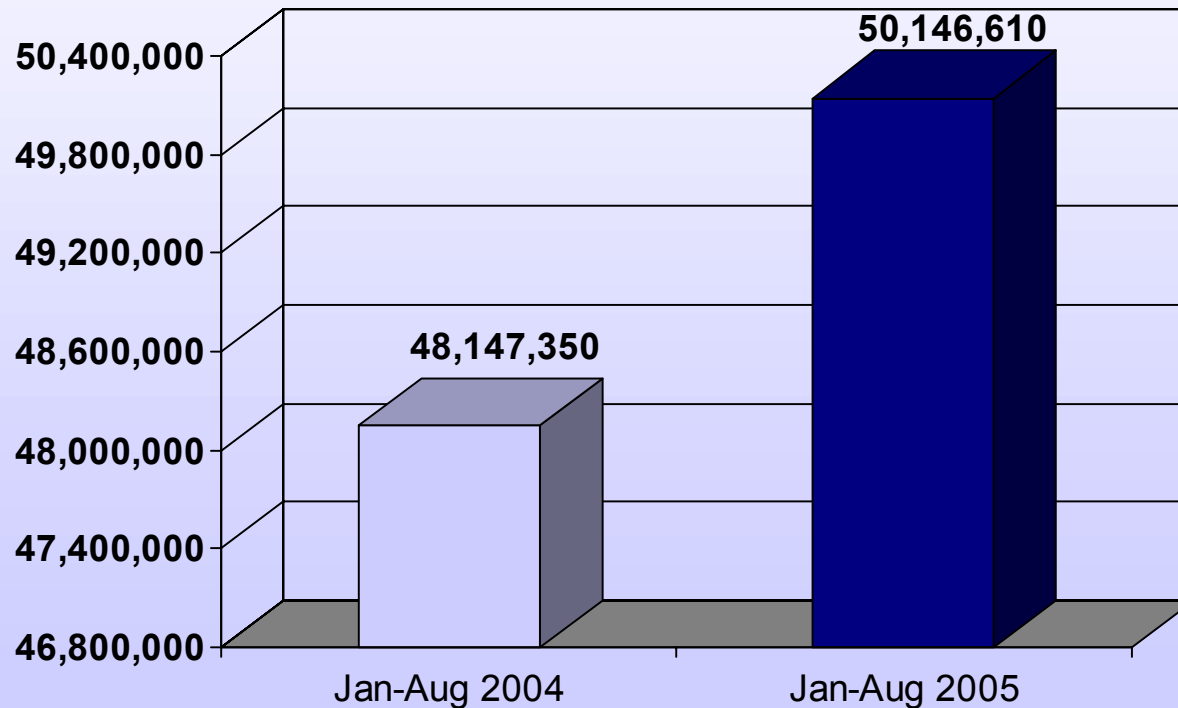
courtesy of



Room Nights – US

US Hotels experienced an increase of **4.2%** in room nights over the first 8 months of 2004

Room Nights
Jan- Aug 2004 vs. Jan- Aug 2005



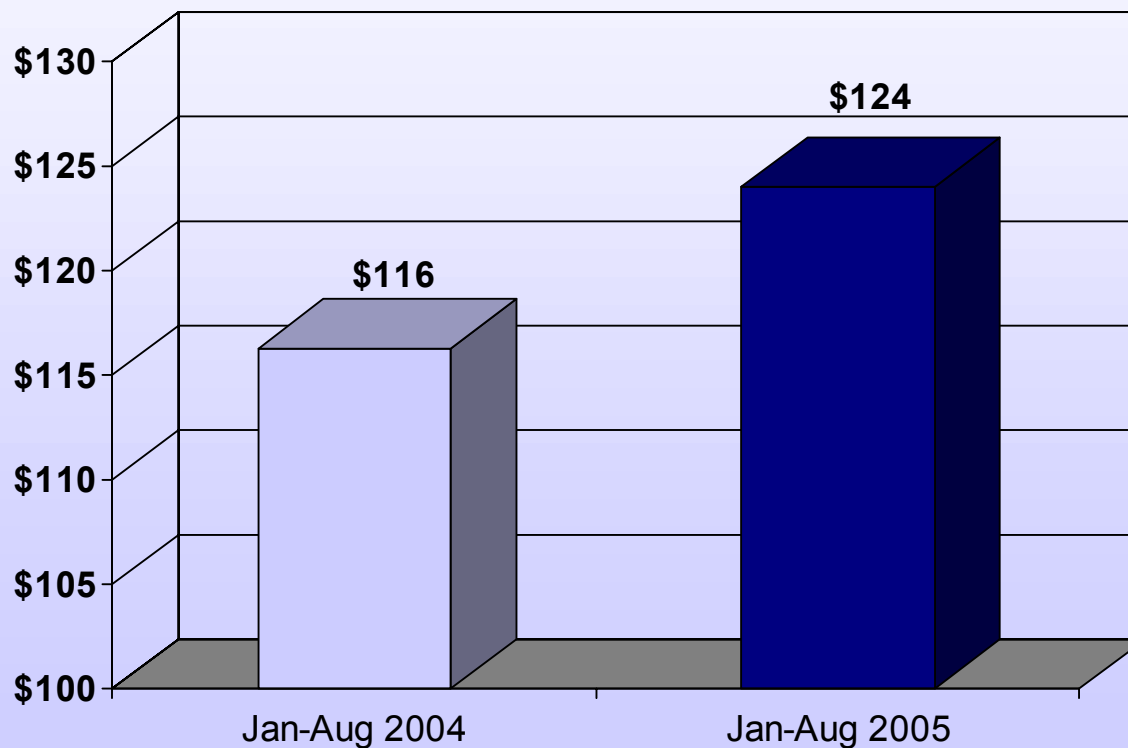
Based on data from TravelCLICK's Proprietary Database



ADR – US

ADR for US Hotels increased 7.1% over January-August 2004

ADR
Jan- Aug 2004 vs. Jan- Aug 2005



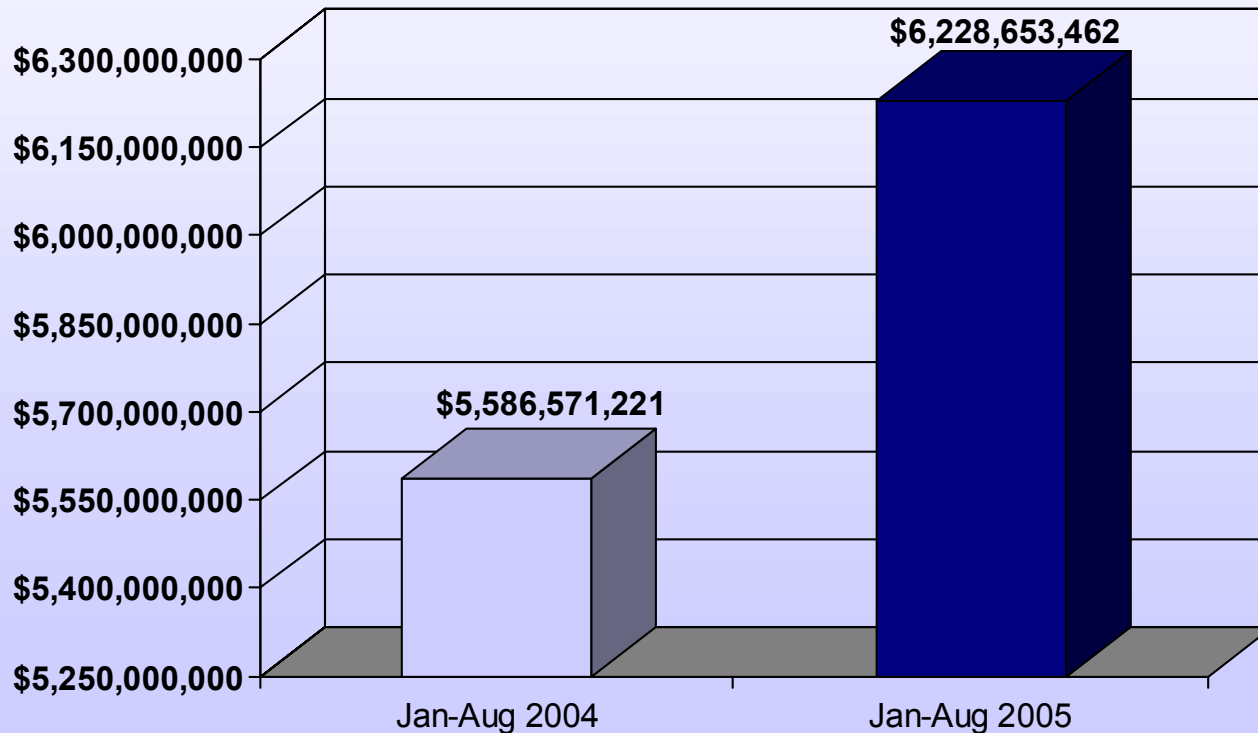
Based on data from TravelCLICK's Proprietary Database



Revenue – US

January-August 2005 Revenue for US Hotels grew **11.5%** over the same period in 2004

Revenue
Jan- Aug 2004 vs. Jan- Aug 2005



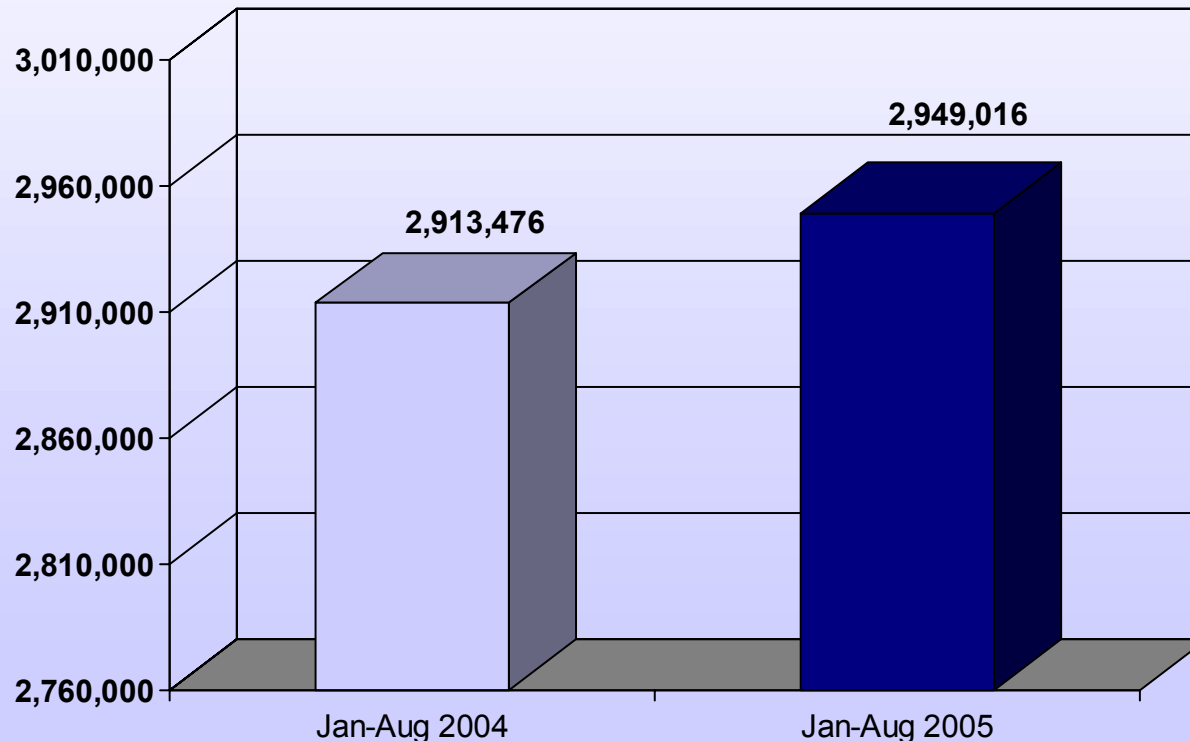
Based on data from TravelCLICK's Proprietary Database



Room Nights – Canada

Hotels in Canada experienced an increase of 1.2% in room nights over the first 8 months of 2004

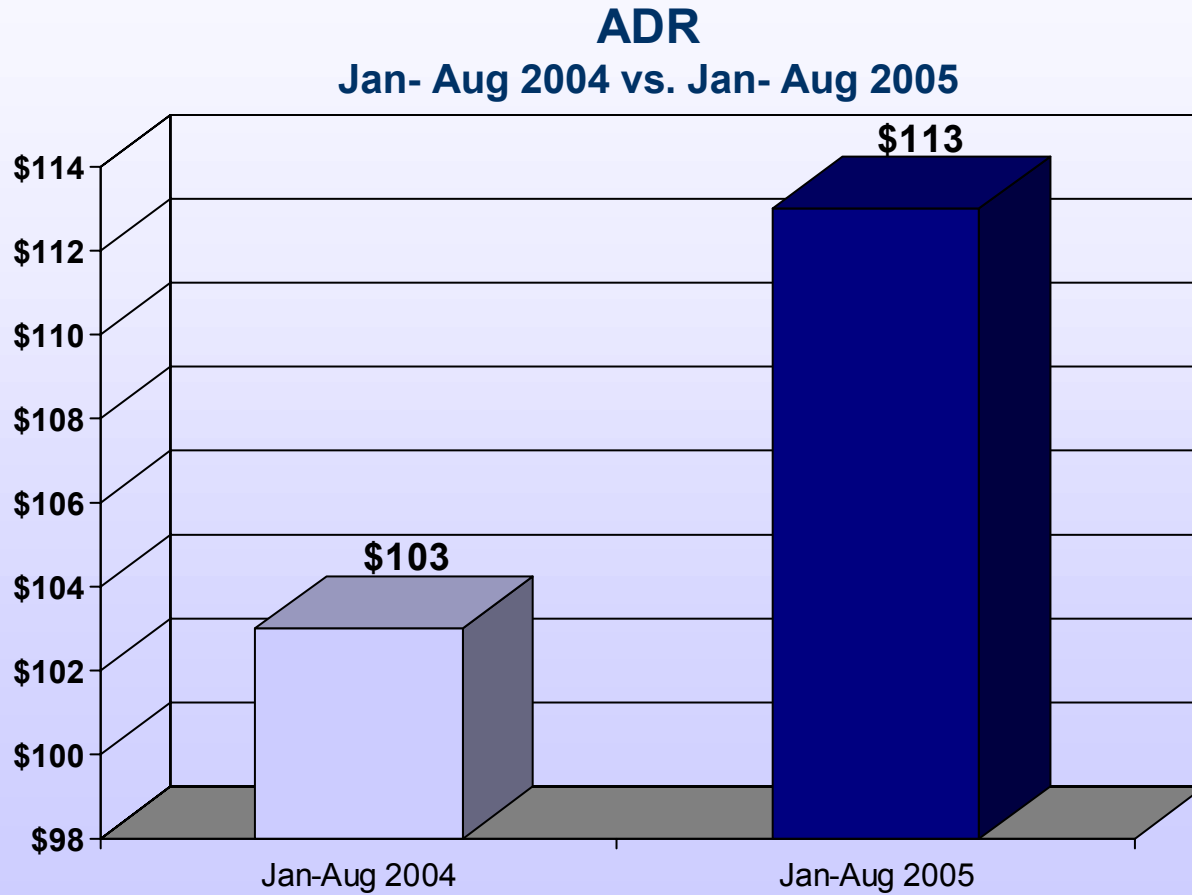
Room Nights
Jan- Aug 2004 vs. Jan- Aug 2005



Based on data from TravelCLICK's Proprietary Database

ADR – Canada

ADR for Canada Hotels increased **9.8%** over January-August 2004



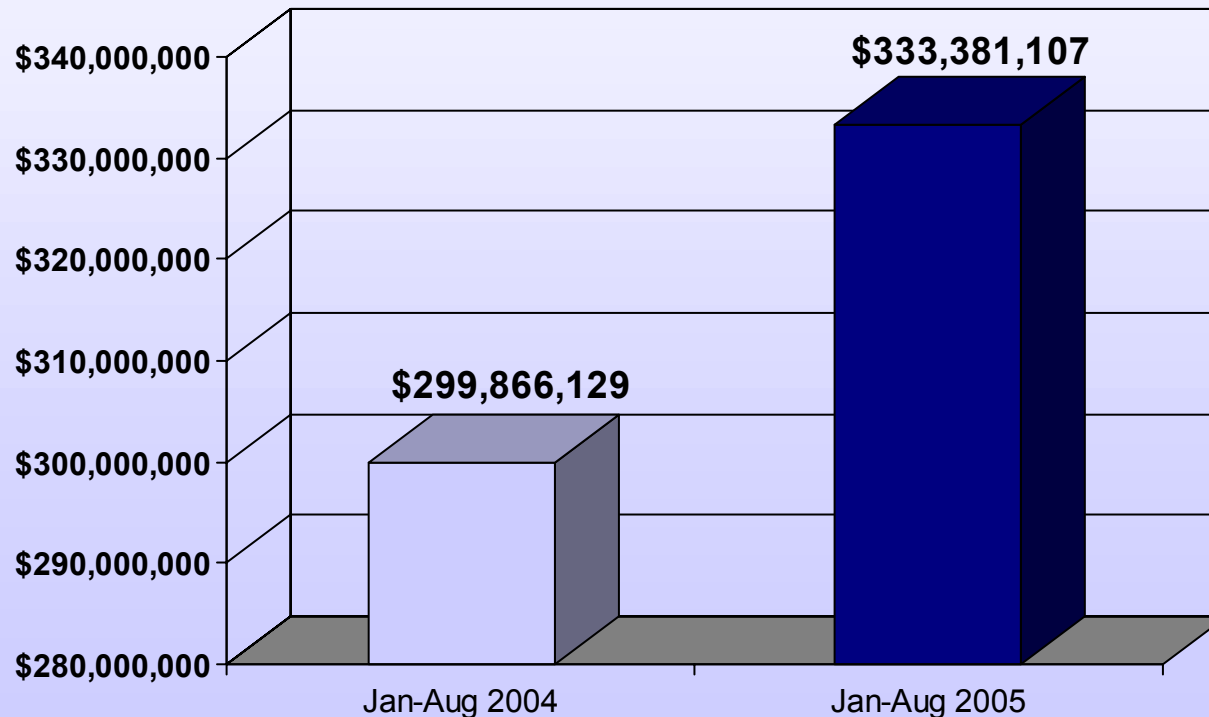
Based on data from TravelCLICK's Proprietary Database



Revenue – Canada

January-August 2005 Revenue for Hotels in Canada increased **11.2%** over the same period in 2004

Revenue
Jan- Aug 2004 vs. Jan- Aug 2005



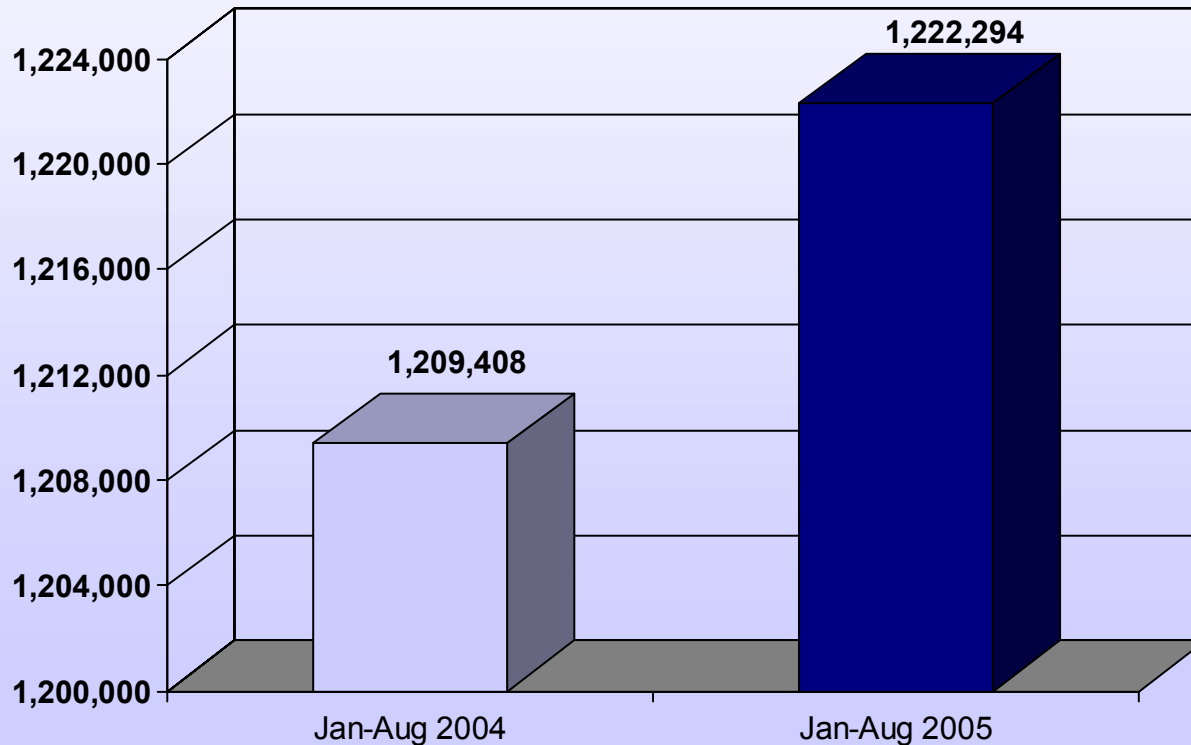
Based on data from TravelCLICK's Proprietary Database



Room Nights – Ontario

Ontario Hotels experienced a **1.1%** increase in room nights over the first 8 months of 2004

Room Nights
Jan- Aug 2004 vs. Jan- Aug 2005



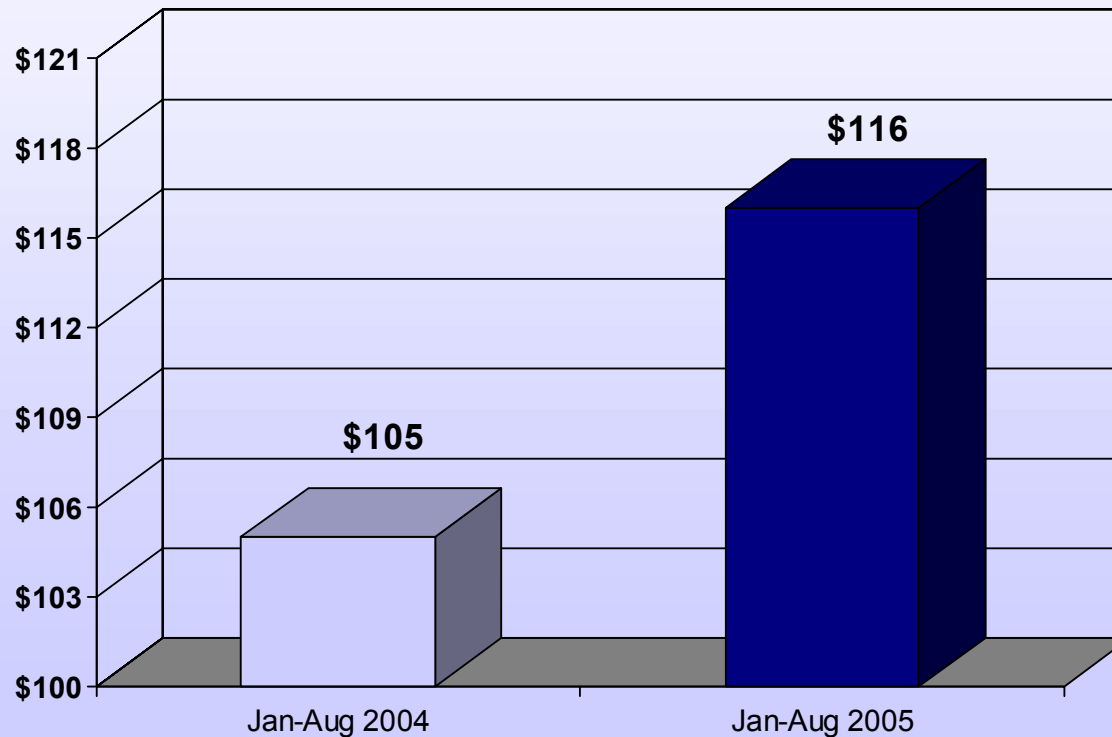
Based on data from TravelCLICK's Proprietary Database

ADR – Ontario

ADR for Hotels in Ontario increased **10.1%** over
January-August 2004

ADR

Jan- Aug 2004 vs. Jan- Aug 2005

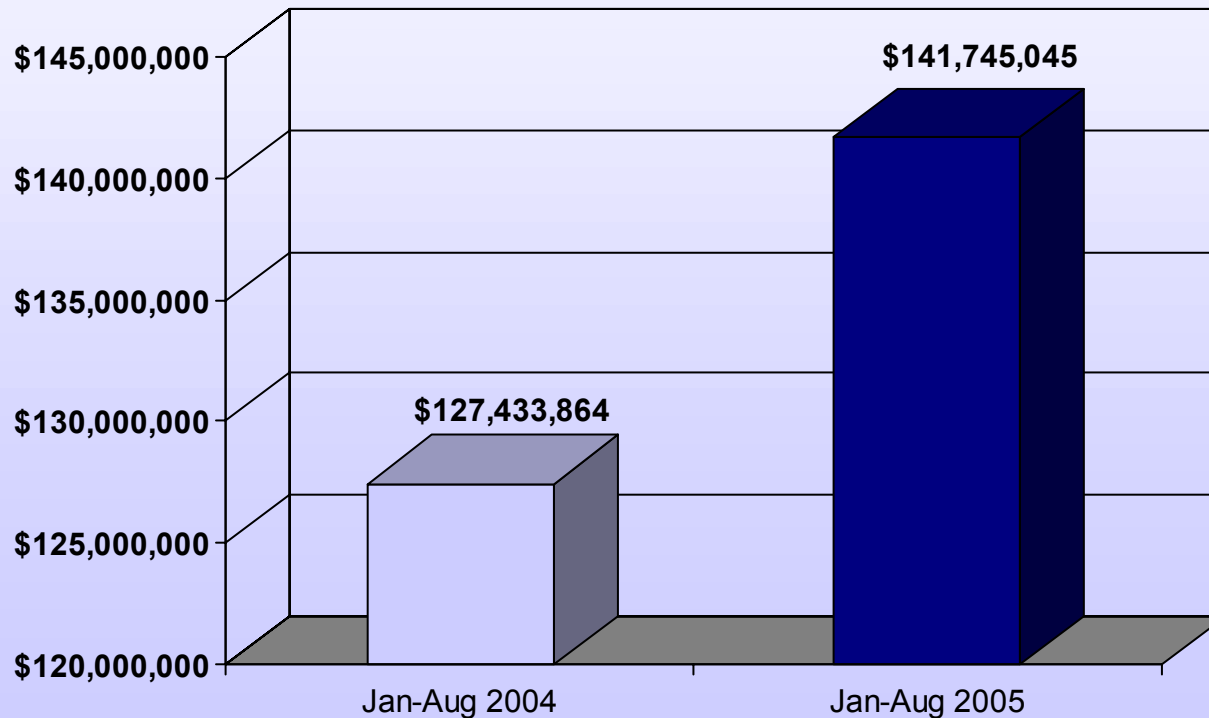


Based on data from TravelCLICK's Proprietary Database

Revenue – Ontario

January-August 2005 Revenue for Ontario Hotels grew **11.2%** over the same period in 2004

Revenue
Jan- Aug 2004 vs. Jan- Aug 2005

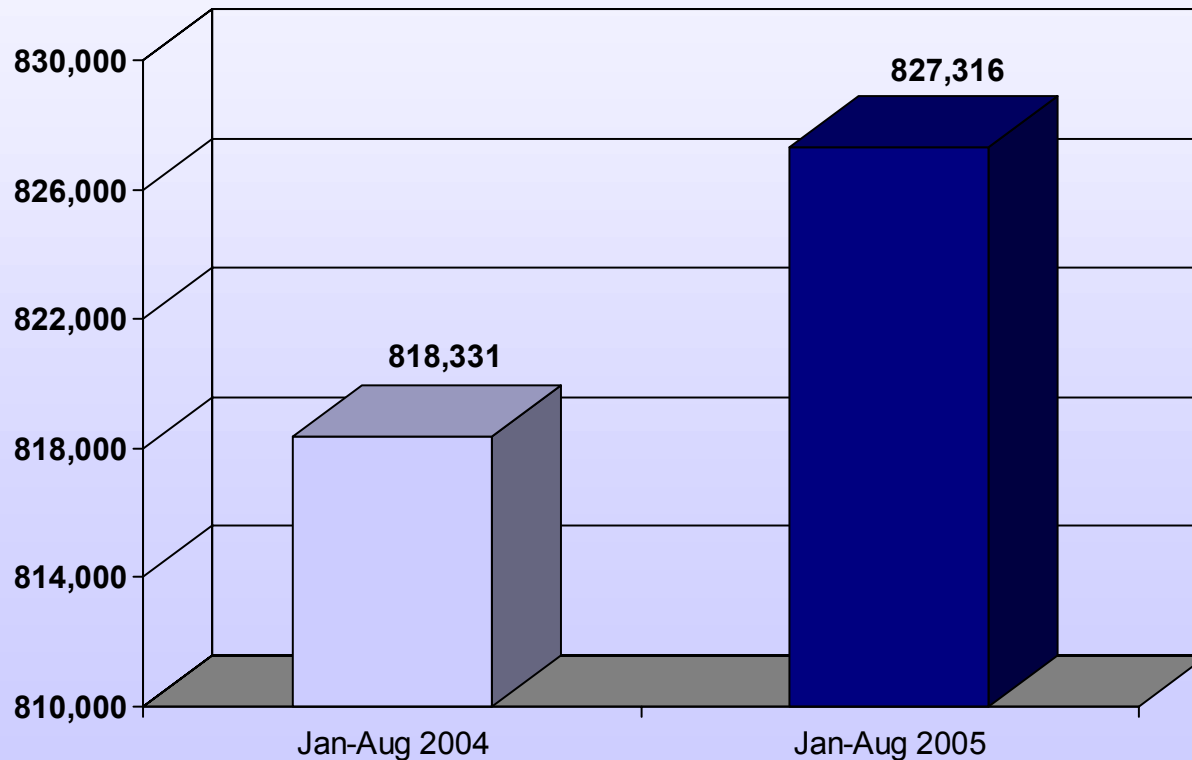


Based on data from TravelCLICK's Proprietary Database

Room Nights – Toronto

Toronto Hotels experienced an increase of **1.1%** in room nights over the first 8 months of 2004

Room Nights
Jan- Aug 2004 vs. Jan- Aug 2005



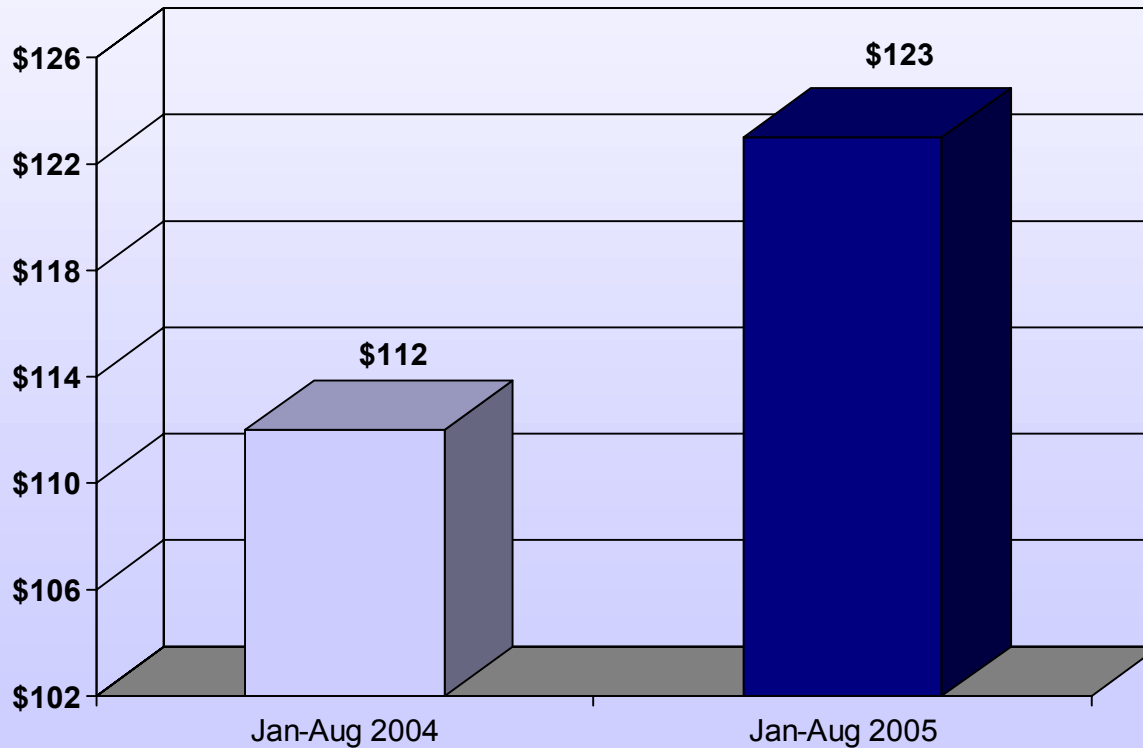
Based on data from TravelCLICK's Proprietary Database

ADR – Toronto

ADR for Hotels in Toronto increased **9.8%** over
January-August 2004

ADR

Jan- Aug 2004 vs. Jan- Aug 2005



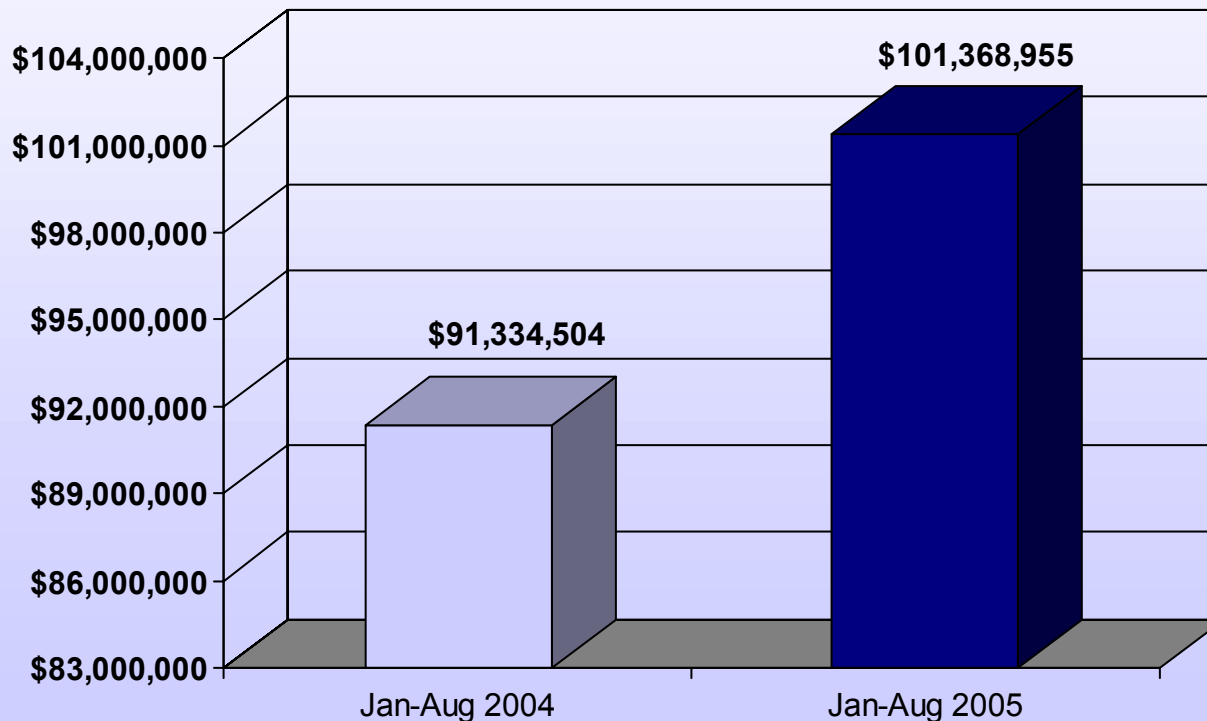
Based on data from TravelCLICK's Proprietary Database



Revenue – Toronto

January-August 2005 Revenue for Toronto Hotels increased **11.0%** over the same period in 2004

Revenue
Jan- Aug 2004 vs. Jan- Aug 2005



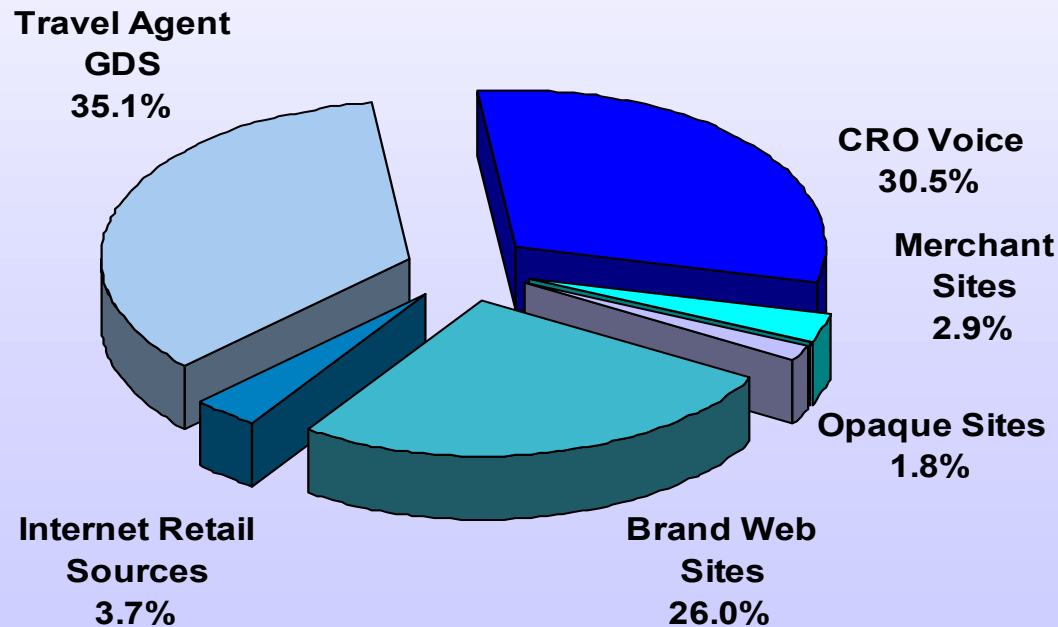
Based on data from TravelCLICK's Proprietary Database



Q1-Q2 2005 Share of CRO Reservations

The Brand Website and Internet channels continued to increase their share of CRO reservations vs. 2004

Q1-Q2 2005

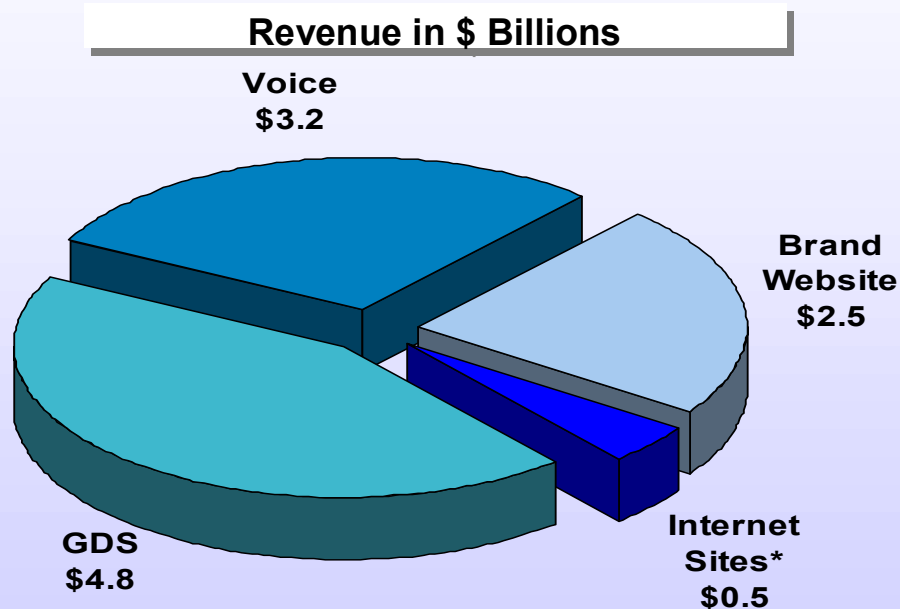


Based on data from TravelCLICK's Proprietary Database



Q1-Q2 2005 Revenue from Channels

Brand websites and Internet channels contributed over 27% of the total revenue booked by the CRO



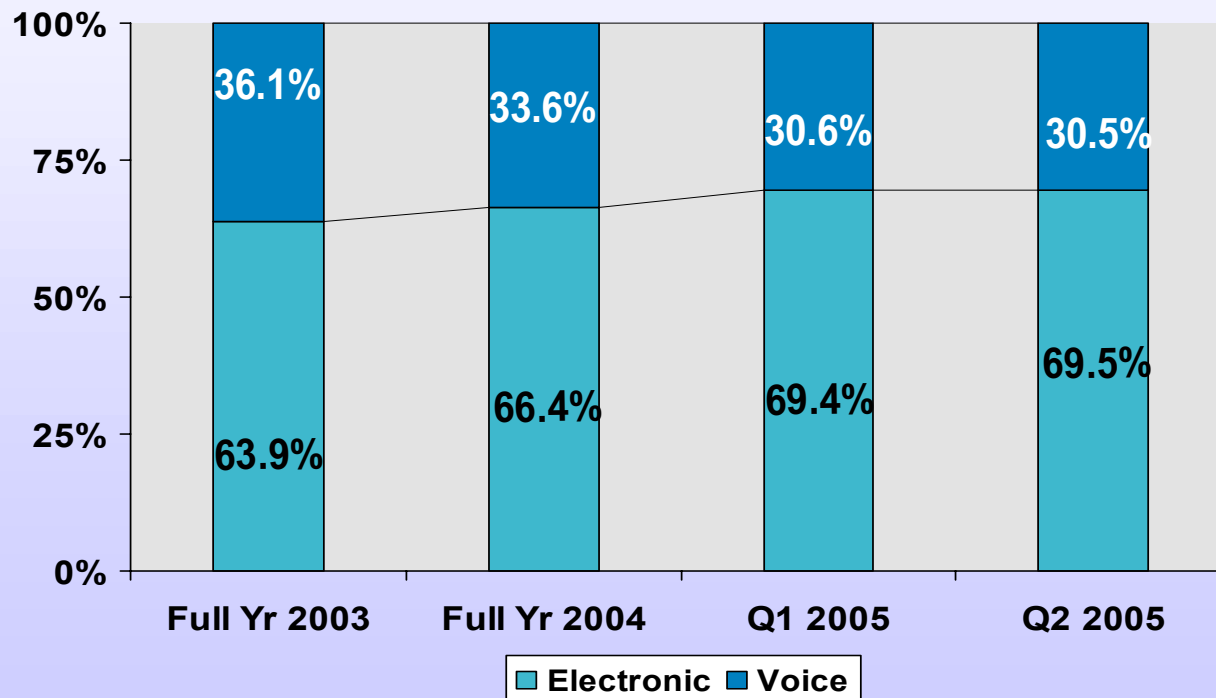
* Internet sites revenue reflects Opaque and Merchant as Hotel's net rate

Based on data from TravelCLICK's Proprietary Database



Q2 2005 Composition of CRO Distribution

CRO distribution remained virtually constant in Q2 2005 compared to Q1 2005



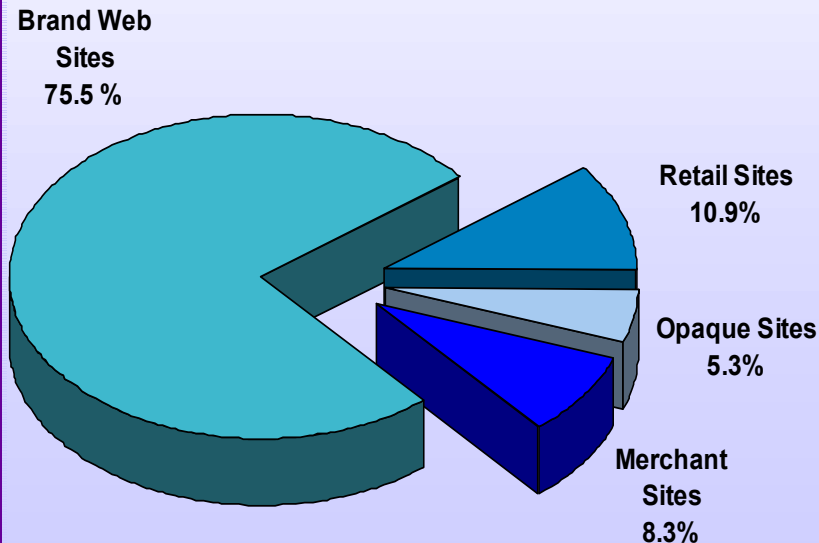
Based on data from TravelCLICK's Proprietary Database



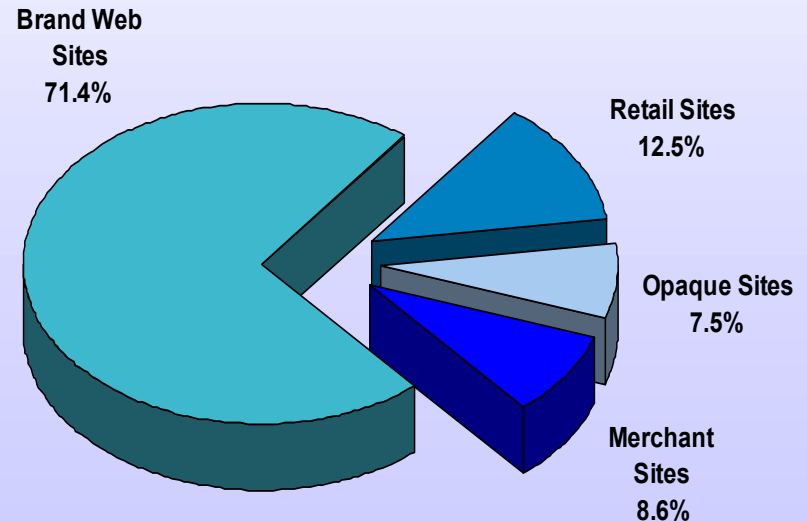
Q2 2005 Sources of Internet Reservations*

The Brands' own websites strengthened their position as the leading source of Internet reservations

Q2 2005



Full Year 2004



*Reflects reservations processed through a CRO. Hotels.com, property website 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 TravelCLICK's eTRAK participants by Q1-Q2 2005 reservations production:

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

Based on data from TravelCLICK's Proprietary Database



Q1-Q2 2005 Electronic Distribution

1st Half 2005 vs. 1st Half 2004

	1st Half '05 Booking	% Growth over 1st Half '04
Internet Total	15,413,309	26.7%
Brand Total	11,634,217	34.0%
Retail Total	1,675,107	3.2%
<i>Expedia</i>	383,199	3.5%
<i>Travelocity</i>	244,945	-0.5%
<i>Orbitz</i>	175,055	-19.2%
<i>TravelNow</i>	158,279	-8.5%
<i>USA Hotelguide</i>	41,755	-14.3%
<i>Other</i>	671,874	18.3%
Merchant Total	1,284,595	38.7%
<i>Expedia</i>	466,396	29.7%
<i>Hotels.com</i>	313,329	-0.4%
<i>Travelocity</i>	297,157	59.7%
<i>Orbitz</i>	114,213	214.9%
<i>TravelWeb</i>	65,365	122.7%
<i>Lodging</i>	28,135	N/A
Opaque Total	819,390	-11.9%
<i>Hotwire</i>	197,551	-6.1%
<i>Priceline</i>	621,839	-13.6%
GDS Total	15,631,929	4.8%

Based on data from TravelCLICK's Proprietary Database

