

Hotel Electronic Distribution Network Association

Chicago Networking Event

April 20th, 2005

Hotel Monaco

WELCOME!

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Vice President, Hotel & Supplier Relations

ABC Corporate Services



Agenda

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



Chicago Market Trends

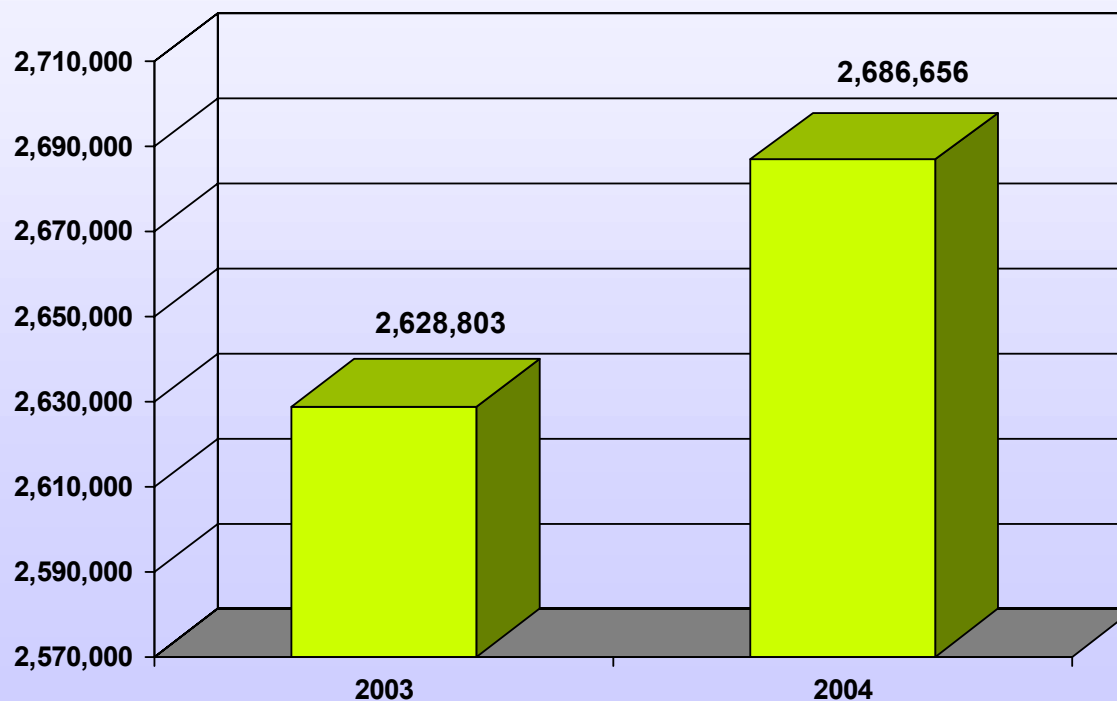
courtesy of



Total Room Nights – Chicago Market

The Chicago Market experienced an increase of **2.2%** year-over-year in room nights

Total Room Nights
January – December
2003 vs. 2004



Based on data from TravelCLICK's Proprietary Database

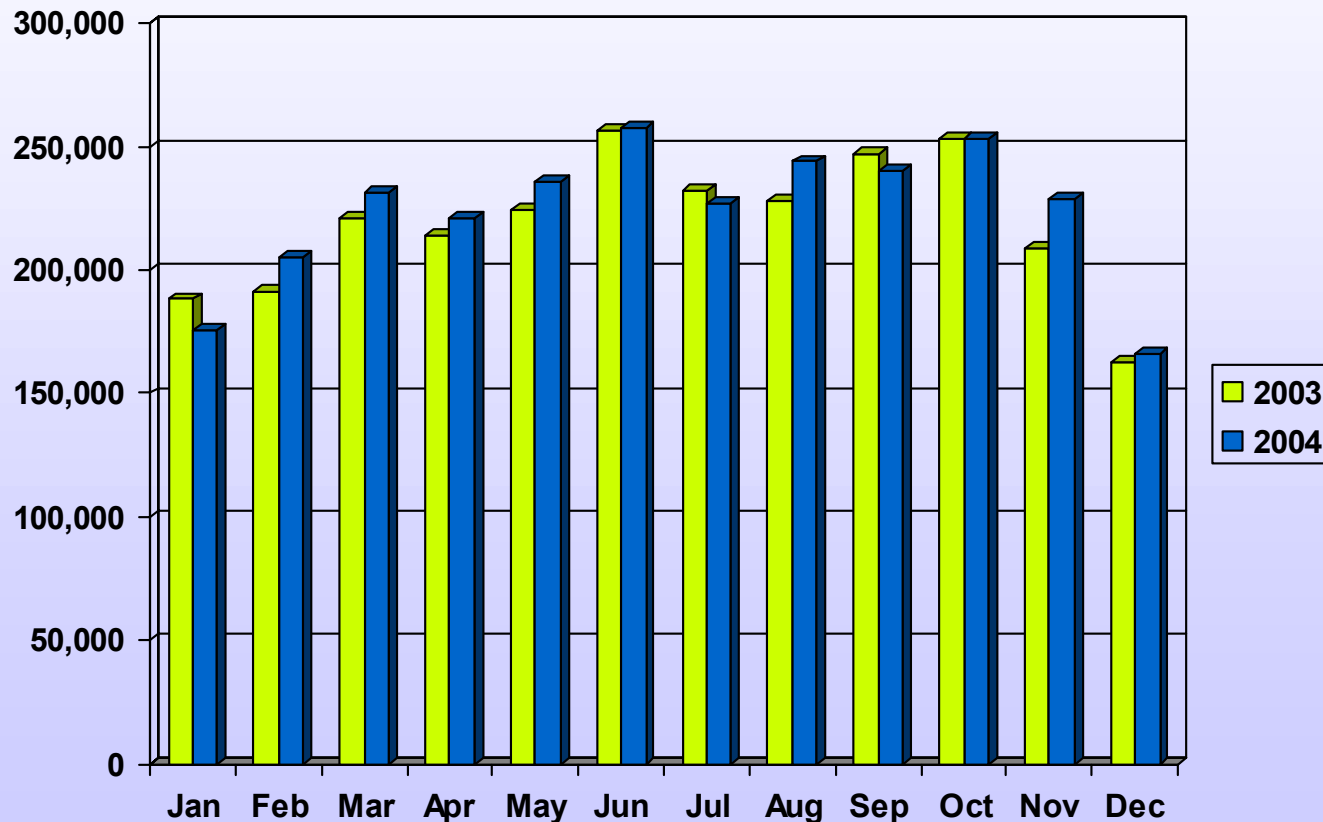


Room Nights – Chicago Market

Month-by-Month View

January – December

2003 vs. 2004



Based on data from TravelCLICK's Proprietary Database



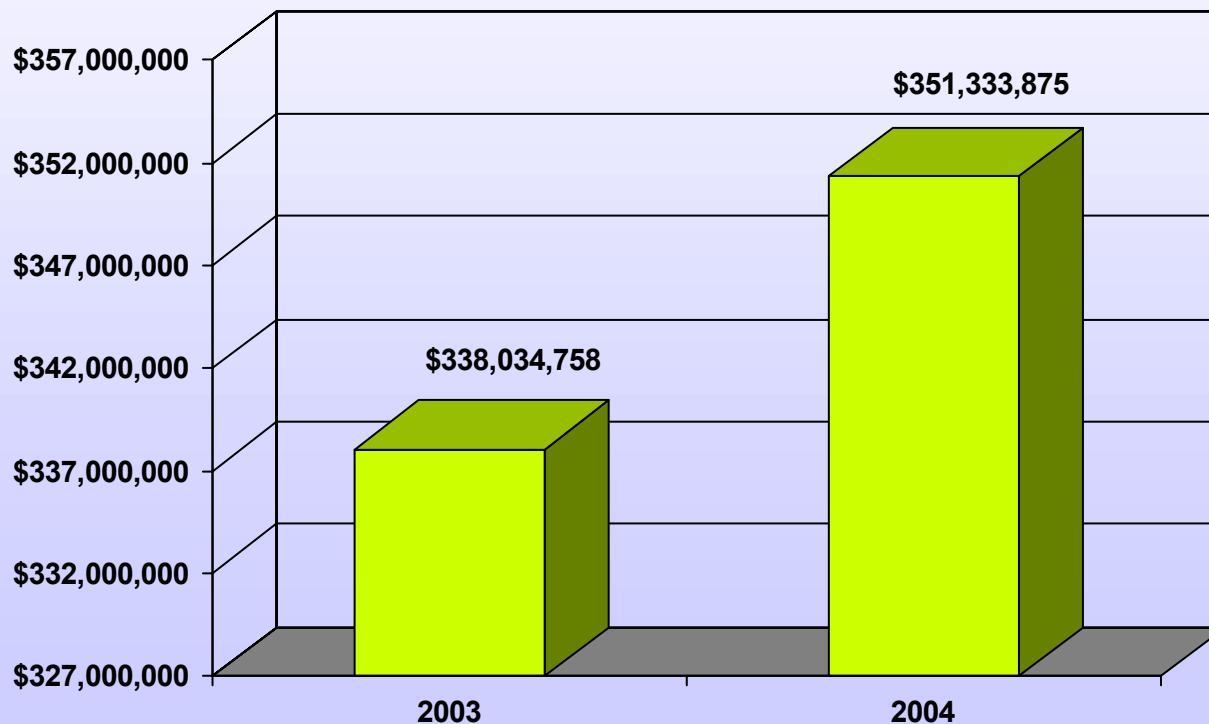
Total Revenue – Chicago Market

Revenue for the Chicago Market increased 3.9% over 2003

Total Revenue

2003 vs. 2004

January – December



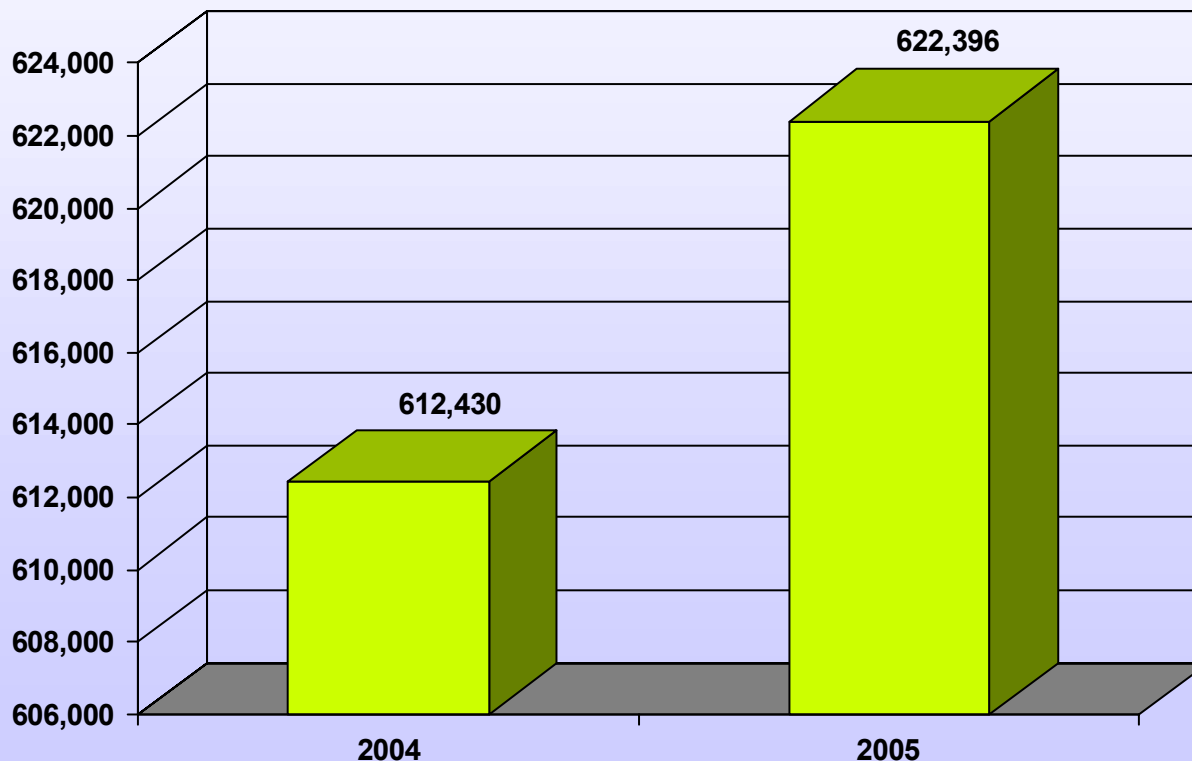
Based on data from TravelCLICK's Proprietary Database



Total Room Nights – Chicago Market

Room nights for the Chicago Market are up 1.6% over the First Quarter of 2004

Total Room Nights
Q1-2004 vs. Q1-2005



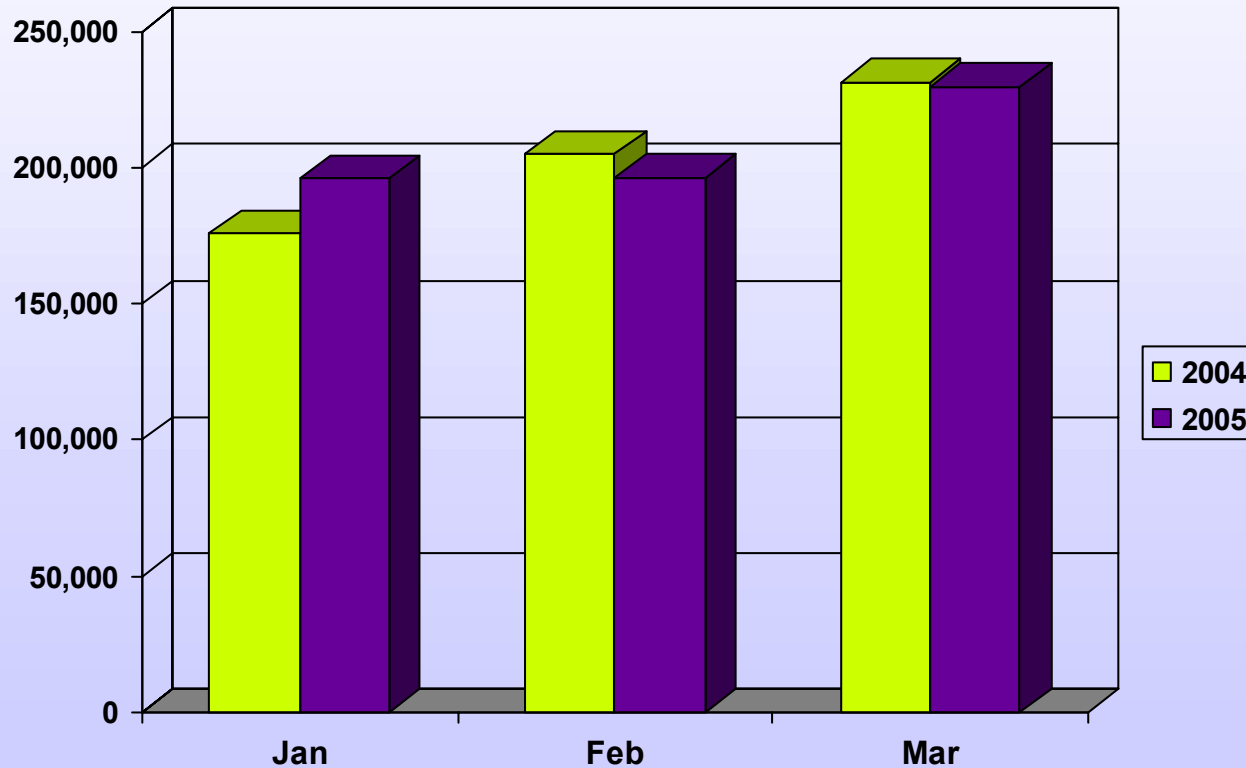
Based on data from TravelCLICK's Proprietary Database



Room Nights – Chicago Market

Month-by-Month View

January – March
2004 vs. 2005



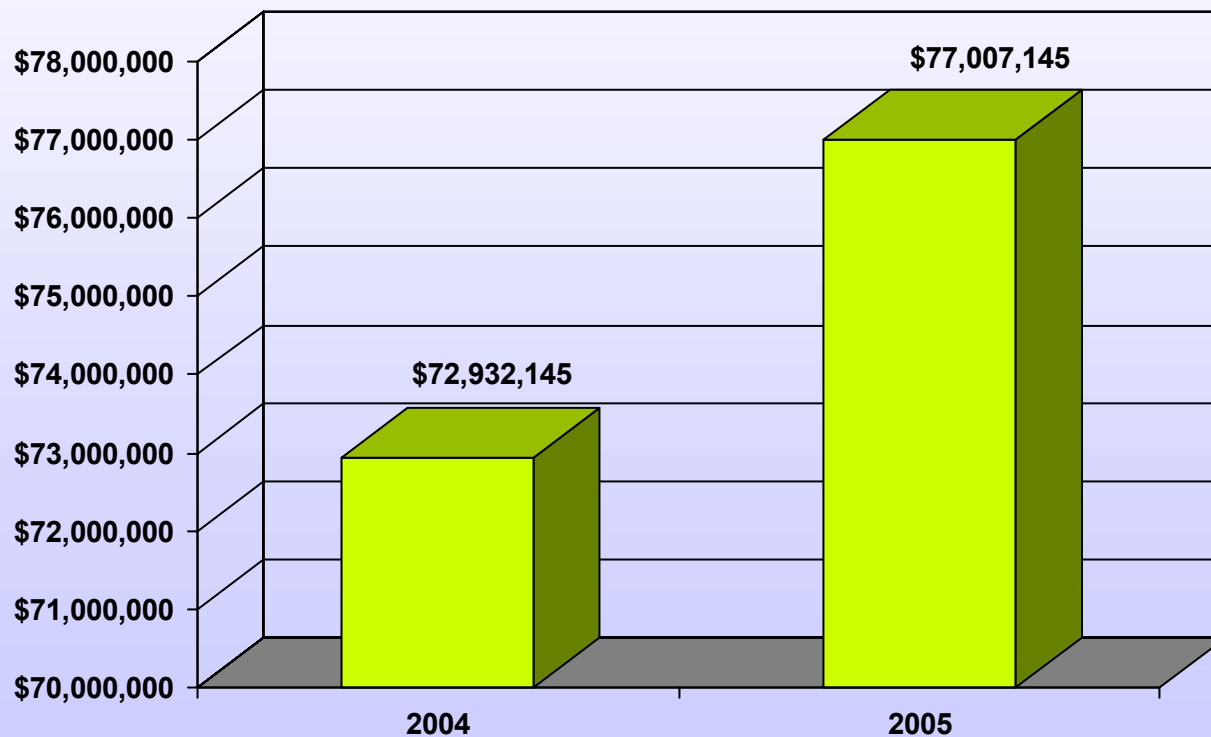
Based on data from TravelCLICK's Proprietary Database



Total Revenue – Chicago Market

Revenue for the Chicago Market is up 5.6% over the First Quarter of 2004

Total Revenue
Q1-2004 vs. Q1-2005

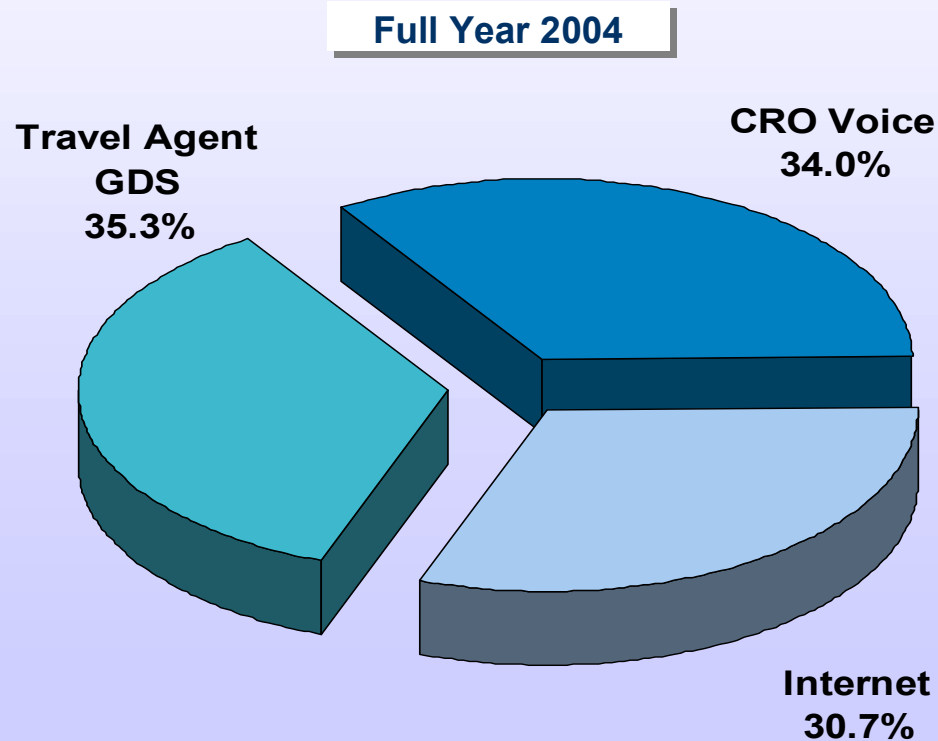


Based on data from TravelCLICK's Proprietary Database



Composition of CRO Distribution

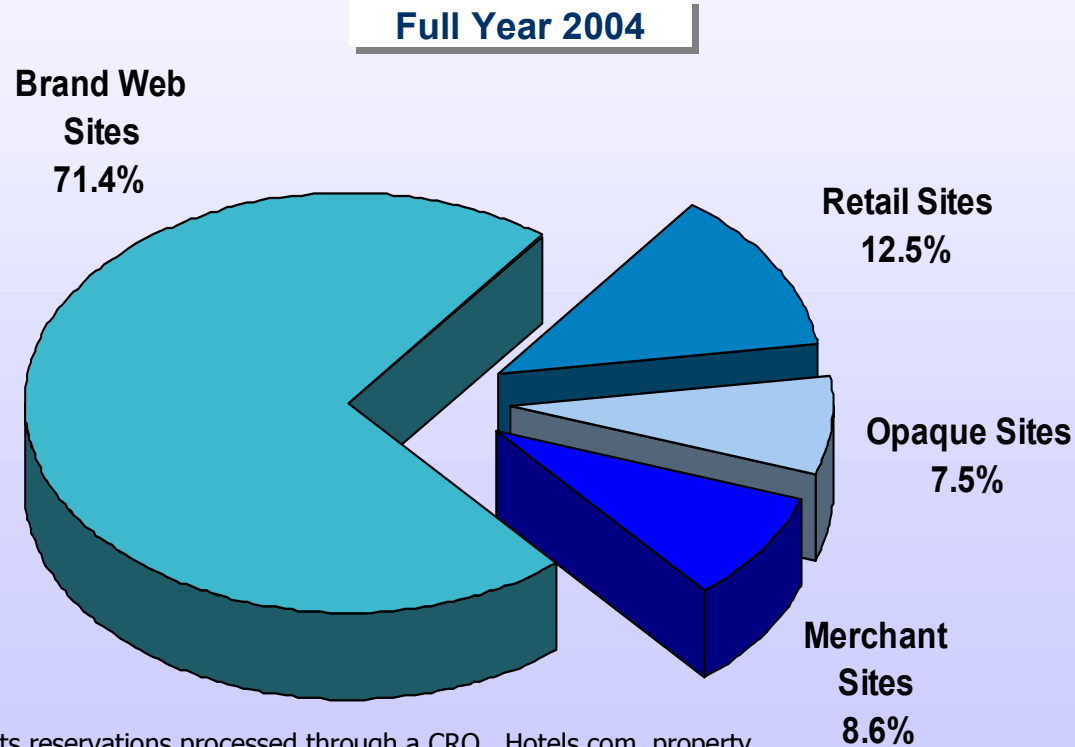
- Electronic channels are the primary source of CRO reservations at 66% of the total
- Internet bookings are 31% of CRO reservations



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:

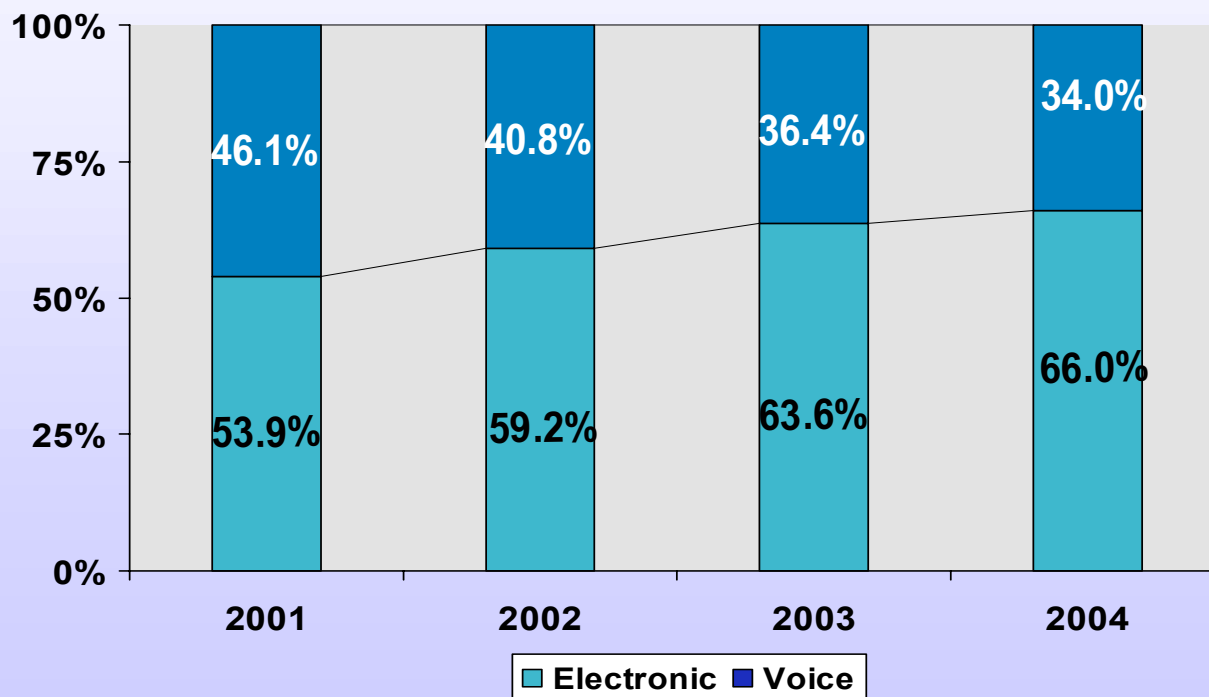
1. Priceline
2. Expedia Merchant
3. Expedia Retail
4. Hotels.com
5. Travelocity Retail
6. Hotwire
7. Travelocity Merchant
8. Orbitz Retail
9. TravelNow
10. Orbitz Merchant

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 2004 vs. Full Year 2003

	Full Year '04 Booking	% Growth over Full Year '03
Internet Total	25,691,776	22.8%
Brand Total	18,353,424	31.9%
Retail Total	3,205,044	-3.6%
<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%
Merchant Total	2,206,022	9.0%
<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%
Opaque Total	1,927,286	16.0%
<i>Hotwire</i>	427,657	14.1%
<i>Priceline</i>	1,499,629	16.6%
GDS Total	29,502,865	5.0%

Based on data from TravelCLICK's Proprietary Database

