

TRAVELCLICK® MARKET ALERT

Middle East, Northern Africa, and Southern Africa



DECEMBER 2009

REGION LAGS BEHIND THE OTHER WORLD REGIONS IN TERMS OF REVPAR RECOVERY

The Middle East/Africa region reported year-end decreases in all three key measurements when reported in U.S. dollars. The region's occupancy in 2009 dropped 10.9 percent to 62.0 percent; average daily rate decreased 2.7 percent to US\$153.91; and revenue per available room decreased 13.3 percent to US\$95.44.

Overall in December, the region's occupancy fell 2.4 percent to 56.8 percent, ADR dropped 5.6 percent to US\$166.53, and RevPAR was down 7.9 percent to US\$94.53.

The region entered the downturn later than Europe, Asia/Pacific and North America; therefore the projected trend is that the Middle East/Africa region will follow the other regions on the recovery path. Within the region, the African hotels performed better with increases in ADR and RevPAR for the month of December. Overall, the Middle East Africa region finished 2009 with 13.3 percent RevPAR decline but still reported the highest RevPAR (US\$95.44) of all world regions.

As the travel industry begins to recover, TRAVELCLICK® hotels continue to outperform the market by 256 percent in revenue month-to-date (MTD) and 382 percent YTD.

Overall Market versus TRAVELCLICK Hotels, Revenue Performance, Month-to-Date

Overall	-7.90%
TRAVELCLICK	12.31%

REVPAR PERFORMANCE HIGHLIGHTS, MIDDLE EAST AND AFRICA

Month-to-Date

Overall Middle East and Africa Performance in Revenue

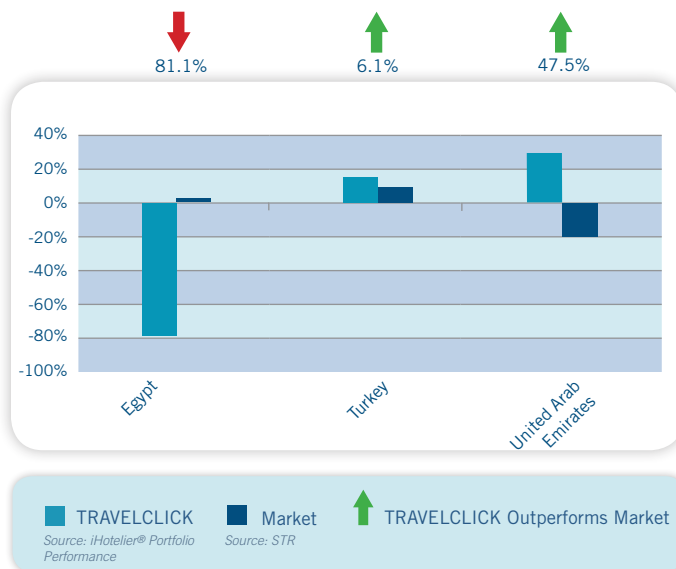
TRAVELCLICK iHotelier® customers in all reported regions are doing a better job of limiting ADR decline year-over-year. The market reflects negative growth in ADR and poorer performance in occupancy.

Top-performing Countries in Revenue

TRAVELCLICK properties have outperformed the market in Turkey, and the United Arab Emirates (see chart).

TRAVELCLICK HOTELS OUTPERFORM THE MARKET

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



Top-performing Markets in Revenue

In Dubai, TRAVELCLICK's iHotelier hotels outperformed the down market across the board for all key metrics—revenue, ADR, and occupancy.

Year-to-Date

Overall Middle East and Africa Performance in Revenue

TRAVELCLICK properties continue to outperform the market in all regions for both revenue and occupancy despite the declining market.

Top-performing Countries in Revenue

TRAVELCLICK properties have again outperformed the market in all of the three tracked countries in the region.

Top-performing Markets in Revenue

Dubai's iHotelier portfolios showed positive performance. In particular, growing ADR in a declining market.

To learn more about how iHotelier® can help you achieve better results, call us or go to www.travelclick.net.

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TRAVELCLICK® Global Offices

