



TravelClick®

Sydney Market Update

John Hach

December 11, 2014

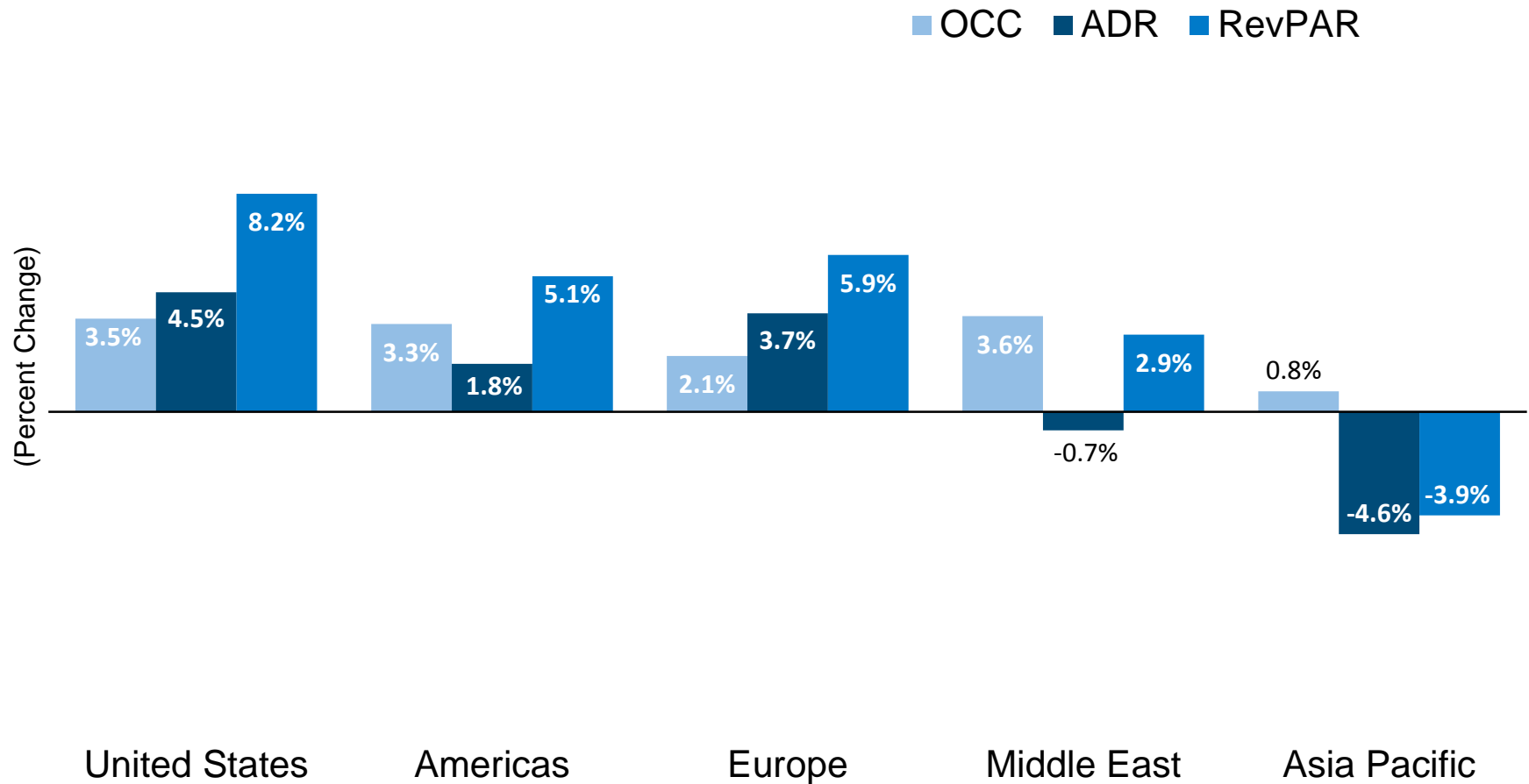


Presented at HSMAI's
Breakfast Seminar 11th
December, 2014



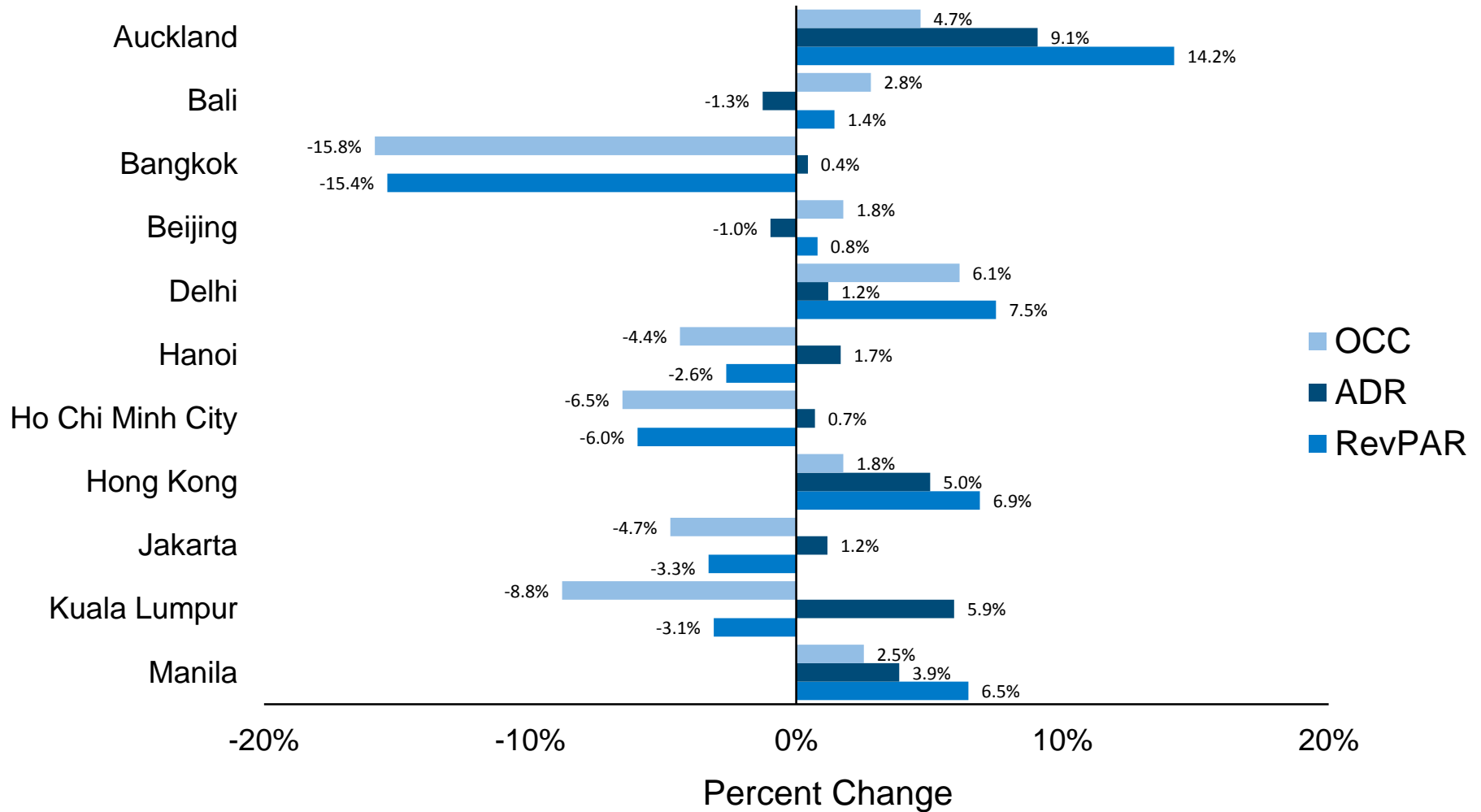
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At-A-Glance | Global Trends



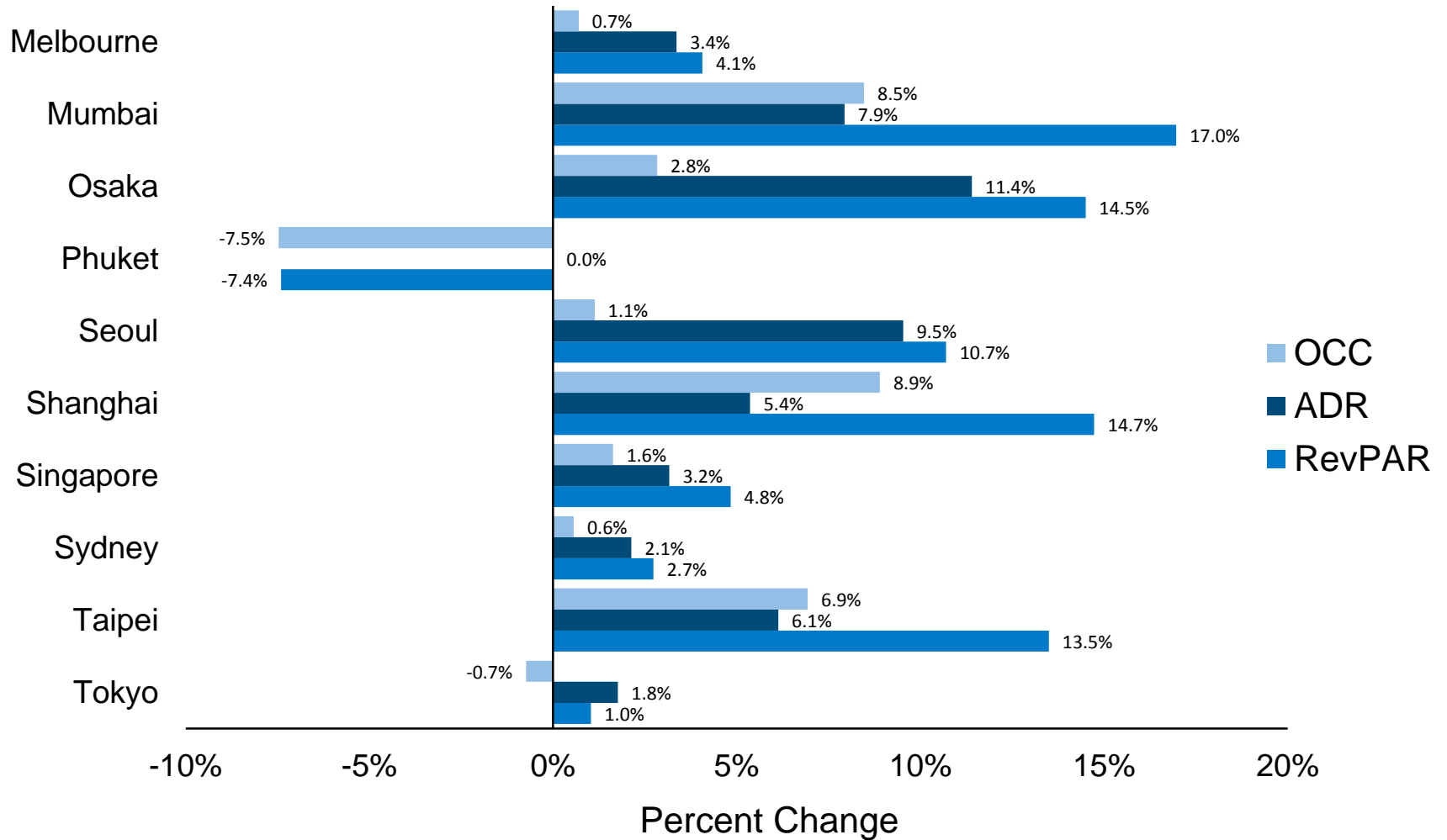
Source: Smith Travel Research Note: All Markets based on Euro, except United States in USD. YTD 2014.

At-A-Glance | Global Trends: Asia Pacific



ADR are in Local Currency. Source: Smith Travel Research. Q3 2014.

At-A-Glance | Global Trends: Asia Pacific cont'd

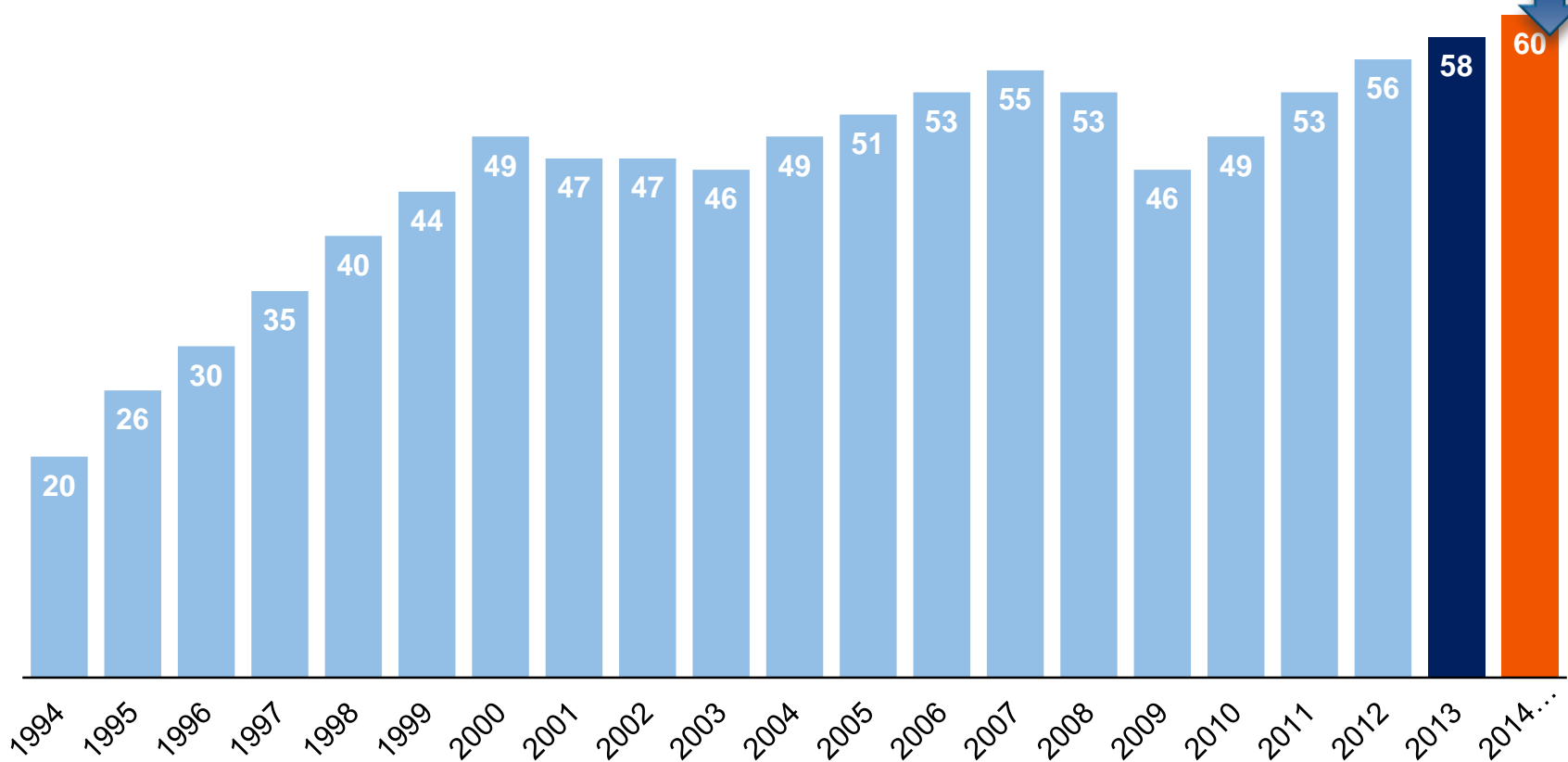


ADR are in Local Currency. Source: Smith Travel Research. Q3 2014.

GDS | Global Historical Performance

Will be a record year for GDS with 60 Million bookings globally

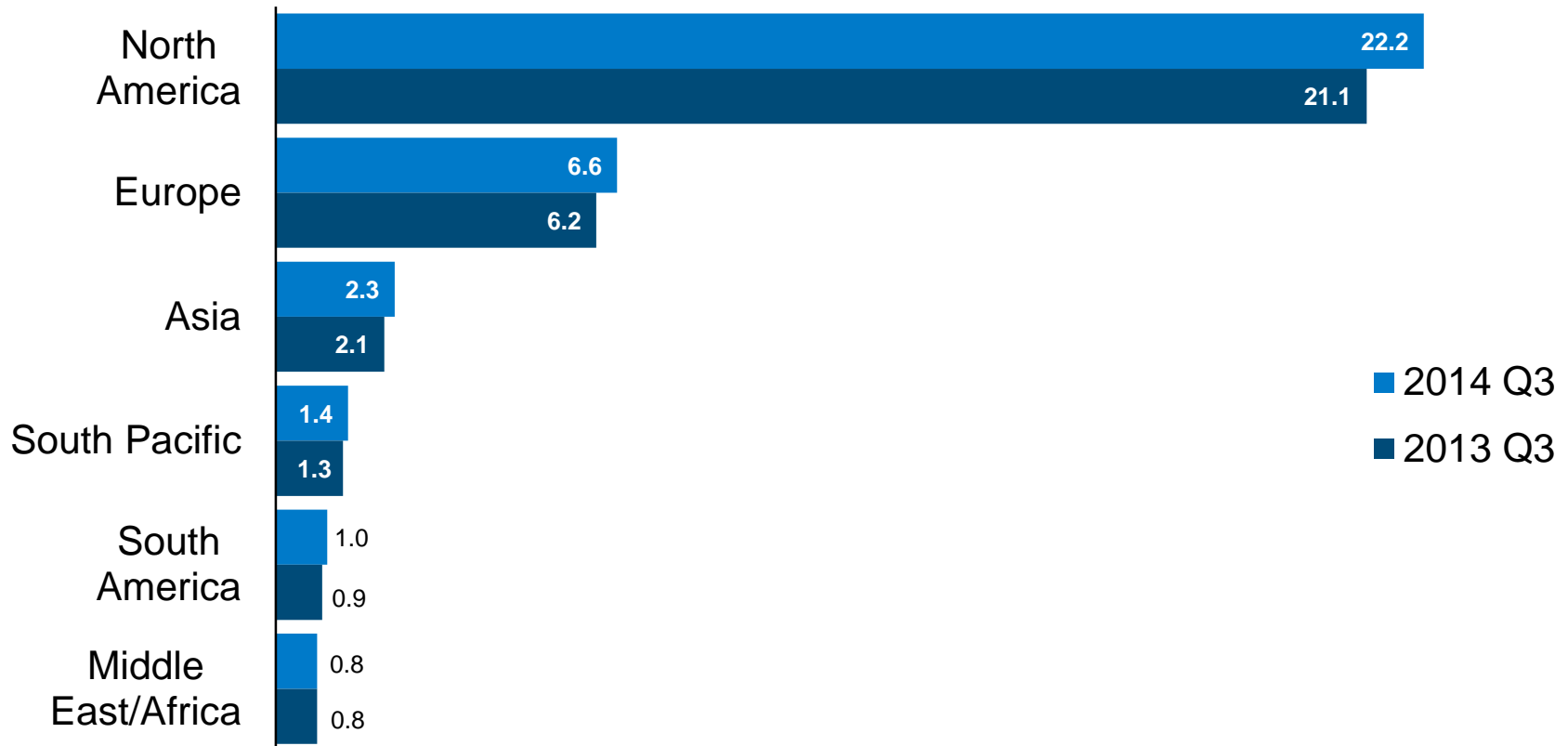
Hotel Bookings (In Millions)



Source: TravelClick eMonitor, Q3 2014.

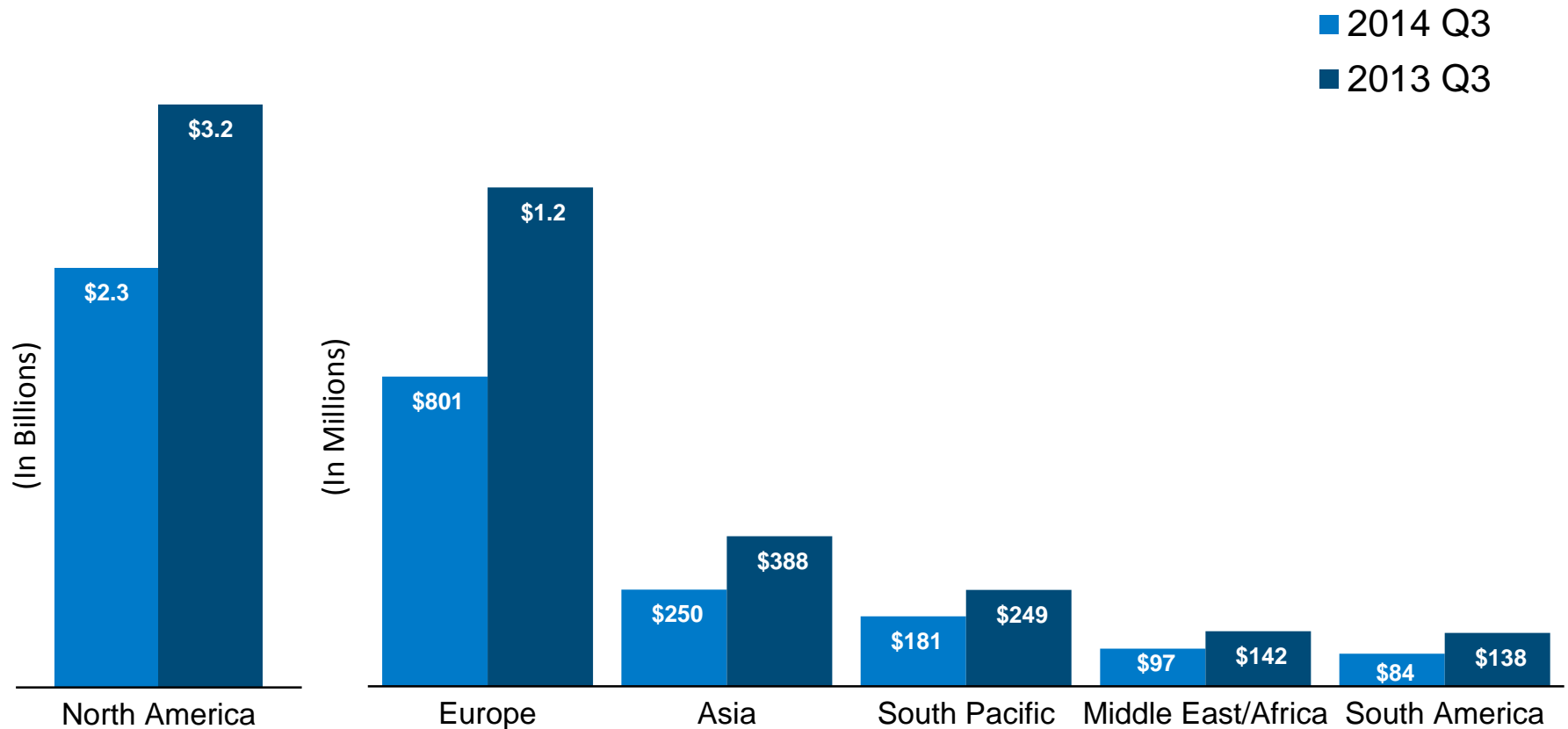
GDS | Room Nights by Region

(In Millions)



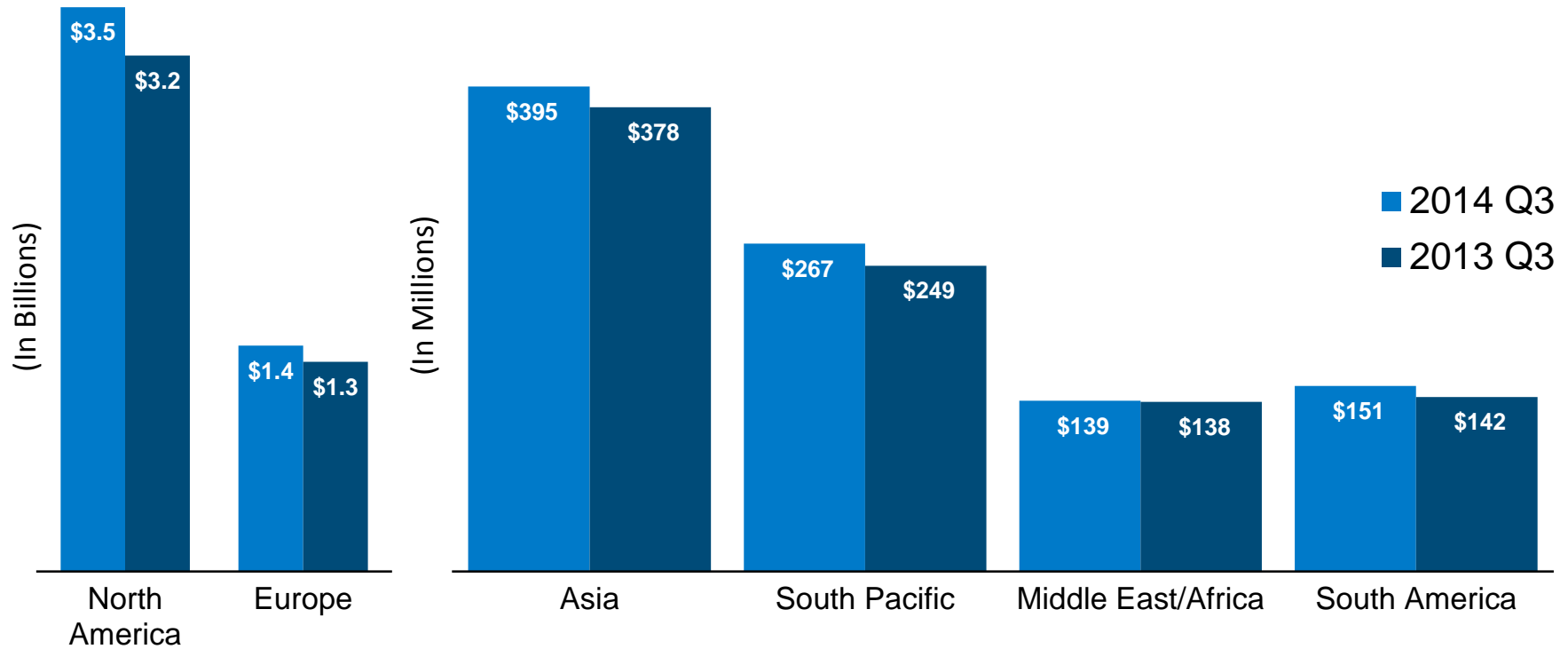
Source: TravelClick Agency360. Q3 2014.

GDS | Performance by Region



Source: TravelClick Agency360. Q3 2014. USD. As of September 27, 2014

GDS | Performance by Region



Source: TravelClick Agency360. Q3 2014. USD.

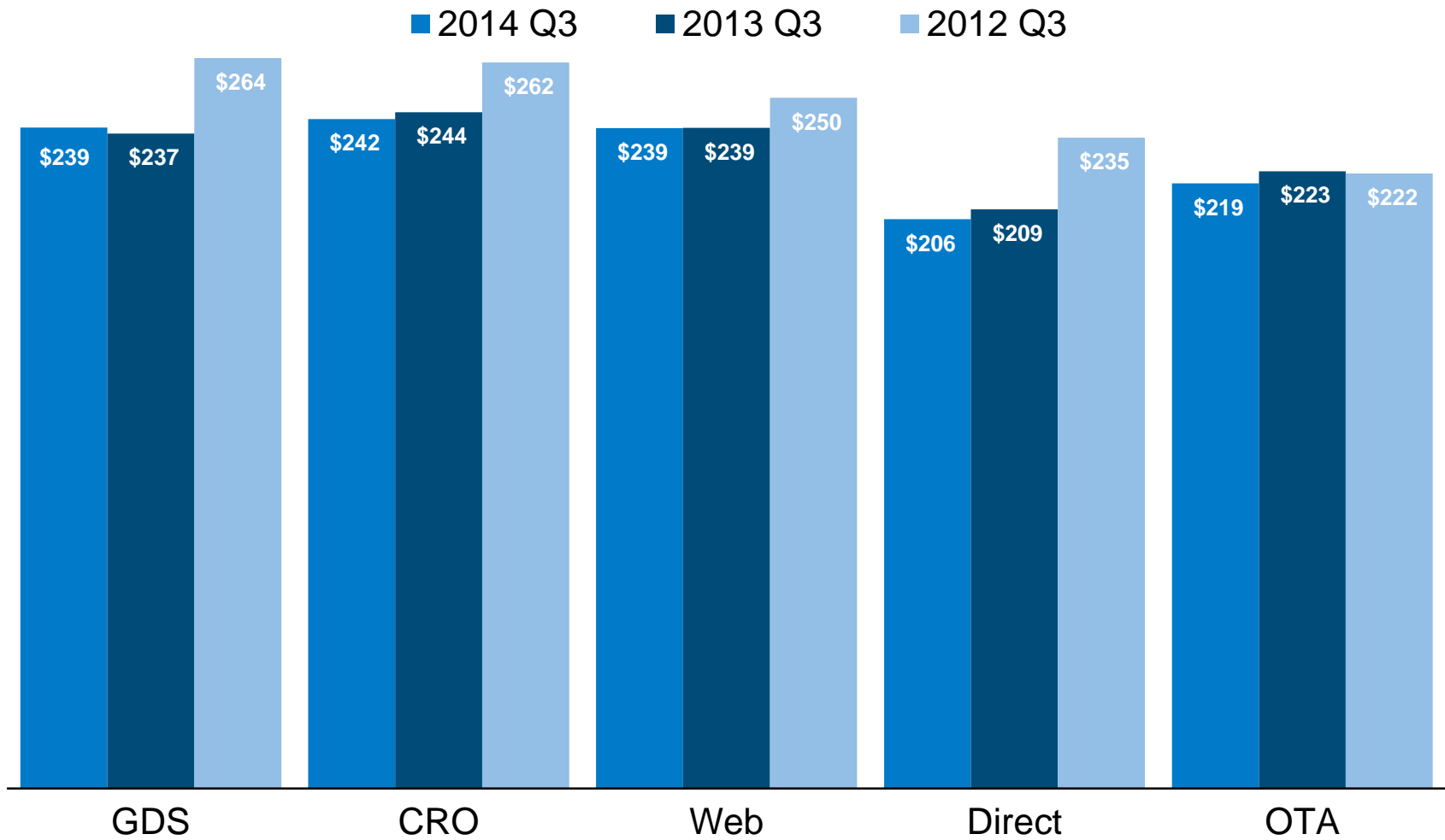
GDS | Performance by Country Alphabetical

Country	Revenue \$	
	Q3 2013	Q3 2014
Afghanistan	\$24,361	\$2,085
Albania	\$205,357	\$234,079
Algeria	\$2,337,791	\$2,359,585
American Samoa	\$42,116	\$38,701
Andorra	\$46,693	\$49,243
Angola	\$1,091,252	\$1,455,132
Anguilla	\$364,472	\$227,830
Antigua and Barbuda	\$236,275	\$341,228
Argentina	\$11,052,116	\$10,539,978
Armenia	\$346,221	\$216,432
Aruba	\$1,085,242	\$1,283,177
Australia	\$219,414,508	\$233,296,385
Austria	\$12,392,002	\$13,175,567
Azerbaijan	\$1,689,413	\$1,680,799
Bahamas	\$2,193,593	\$2,539,359
Bahrain	\$1,938,608	\$2,523,319
Bangladesh	\$843,256	\$1,011,283
Barbados	\$865,279	\$657,172
Belarus	\$329,973	\$259,972
Belgium	\$22,874,955	\$22,810,431
Belize	\$142,928	\$111,857
Benin	\$144,403	\$84,113
Bermuda	\$4,291,383	\$3,876,536
Bhutan	\$10,210	\$1,260
Bolivia	\$252,526	\$425,346
Bosnia and Herzegovina	\$61,634	\$180,637
Botswana	\$580,812	\$590,956
Brazil	\$100,635,803	\$109,379,637
Brunei Darussalam	\$100,121	\$184,693
Bulgaria	\$1,214,718	\$1,230,356

Country	Revenue \$	
	Q3 2013	Q3 2014
Burkina Faso	\$33,561	\$31,628
Cambodia	\$510,498	\$461,623
Cameroon	\$330,650	\$308,826
Canada	\$179,897,537	\$188,751,604
Cape Verde	\$37,578	\$70,054
Cayman Islands	\$1,071,482	\$1,281,999
Chad	\$179,200	\$124,538
Chile	\$8,174,239	\$8,452,895
China	\$93,672,244	\$100,223,117
Colombia	\$9,347,258	\$9,938,987
Comoros	\$1,765	\$9,231
Congo	\$52,395	\$113,499
Congo, The Democratic Republic of the	\$337,285	\$308,889
Cook Islands	\$13,933	\$6,577
Costa Rica	\$4,218,185	\$4,429,831
Cote D'Ivoire	\$461,285	\$390,658
Croatia	\$2,444,833	\$2,678,203
Cuba	\$34,041	\$58,506
Curacao	\$5,703	\$10,925
Cyprus	\$924,114	\$820,096
Czech Republic	\$8,535,716	\$8,497,071
Denmark	\$22,606,466	\$25,199,367
Djibouti	\$164,697	\$143,630
Dominica	\$5,677	\$12,206
Dominican Republic	\$1,835,279	\$2,158,135
Ecuador	\$2,051,070	\$2,026,647
Egypt	\$1,159,188	\$2,901,106
El Salvador	\$924,586	\$785,292
Equatorial Guinea	\$117,379	\$191,035
Estonia	\$1,004,516	\$1,075,878

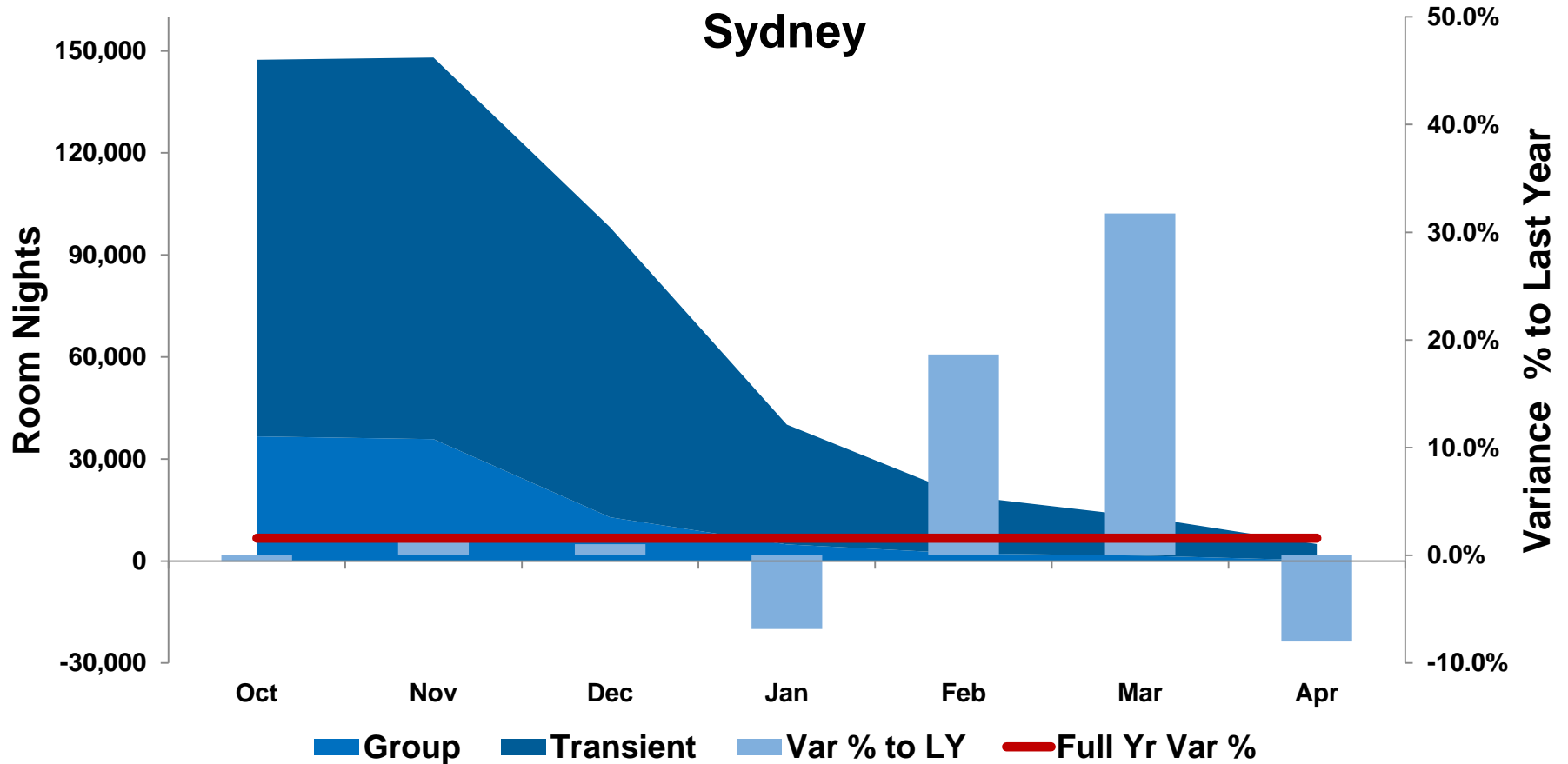
Source: TravelClick Agency360. Q3 2014. Revenue in USD.

Sydney ADR by Channel



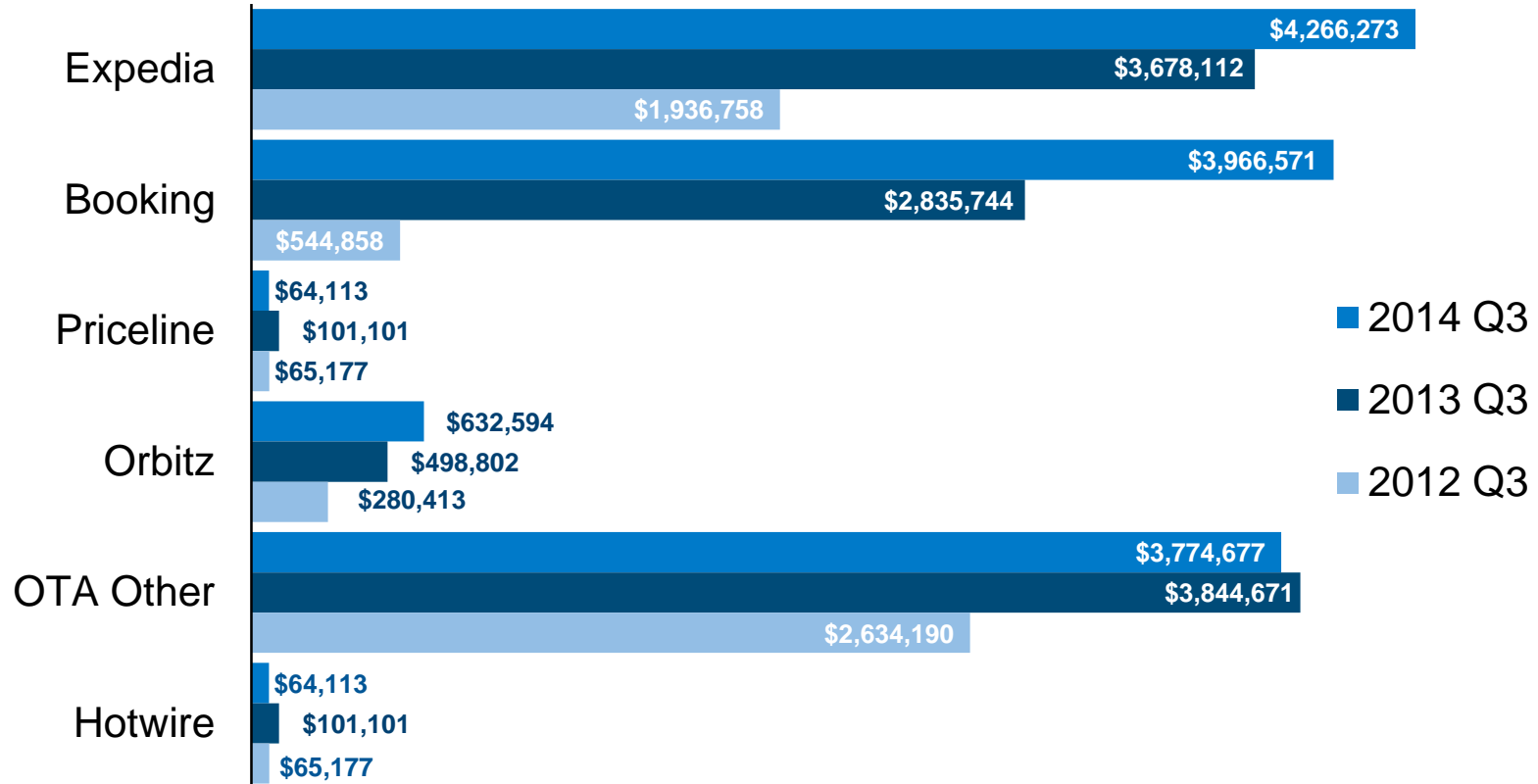
Source: TravelClick Demand360. Revenue in USD. Transient reservations. As of December 2, 2014.

Looking forward, room nights on the books for the next 7 months are up 1.6% over same time last year.



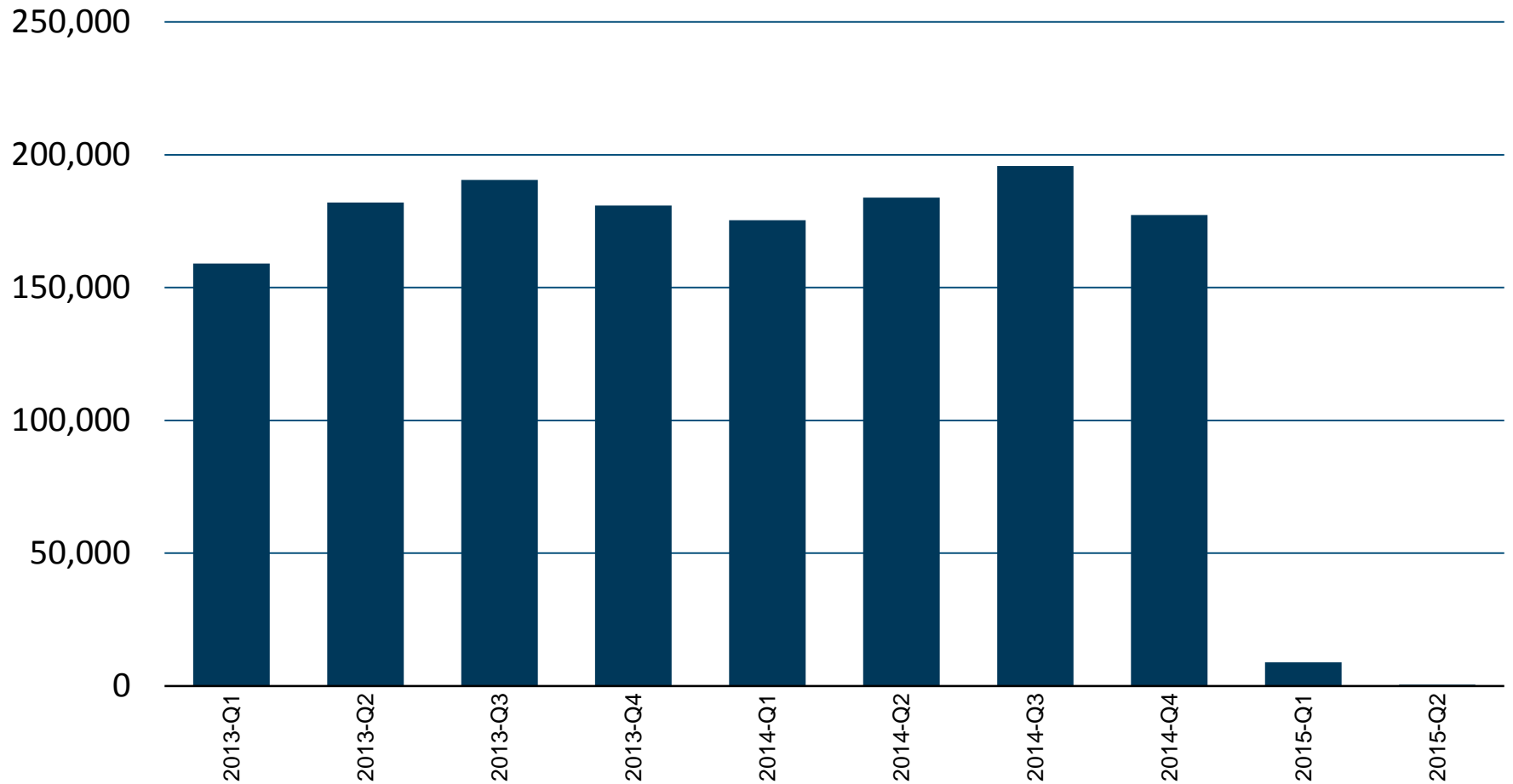
Sydney Internet Revenue

(In USD)



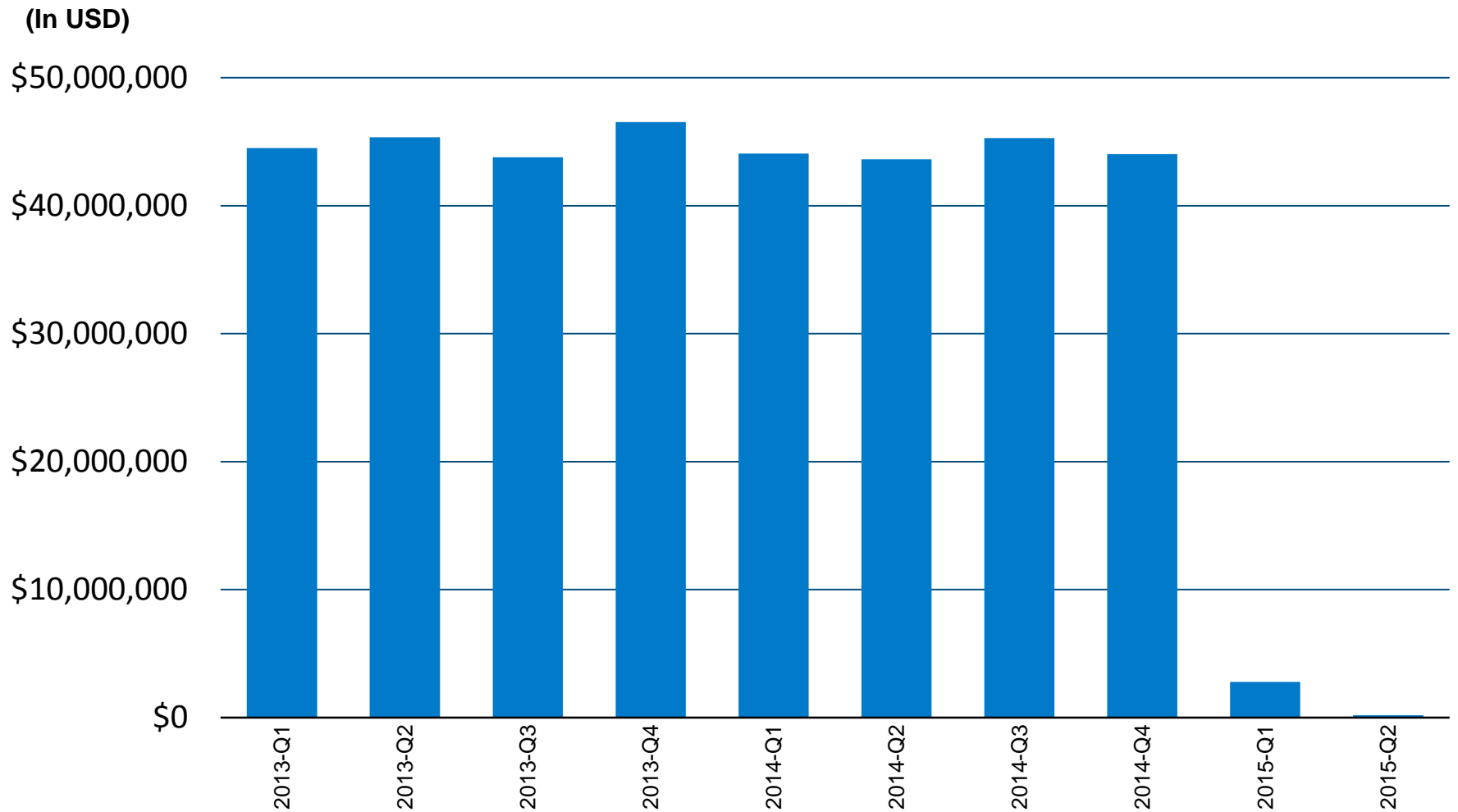
Source: TravelClick Demand360. Transient reservations. As of December 2, 2014.

GDS | Sydney Room Nights



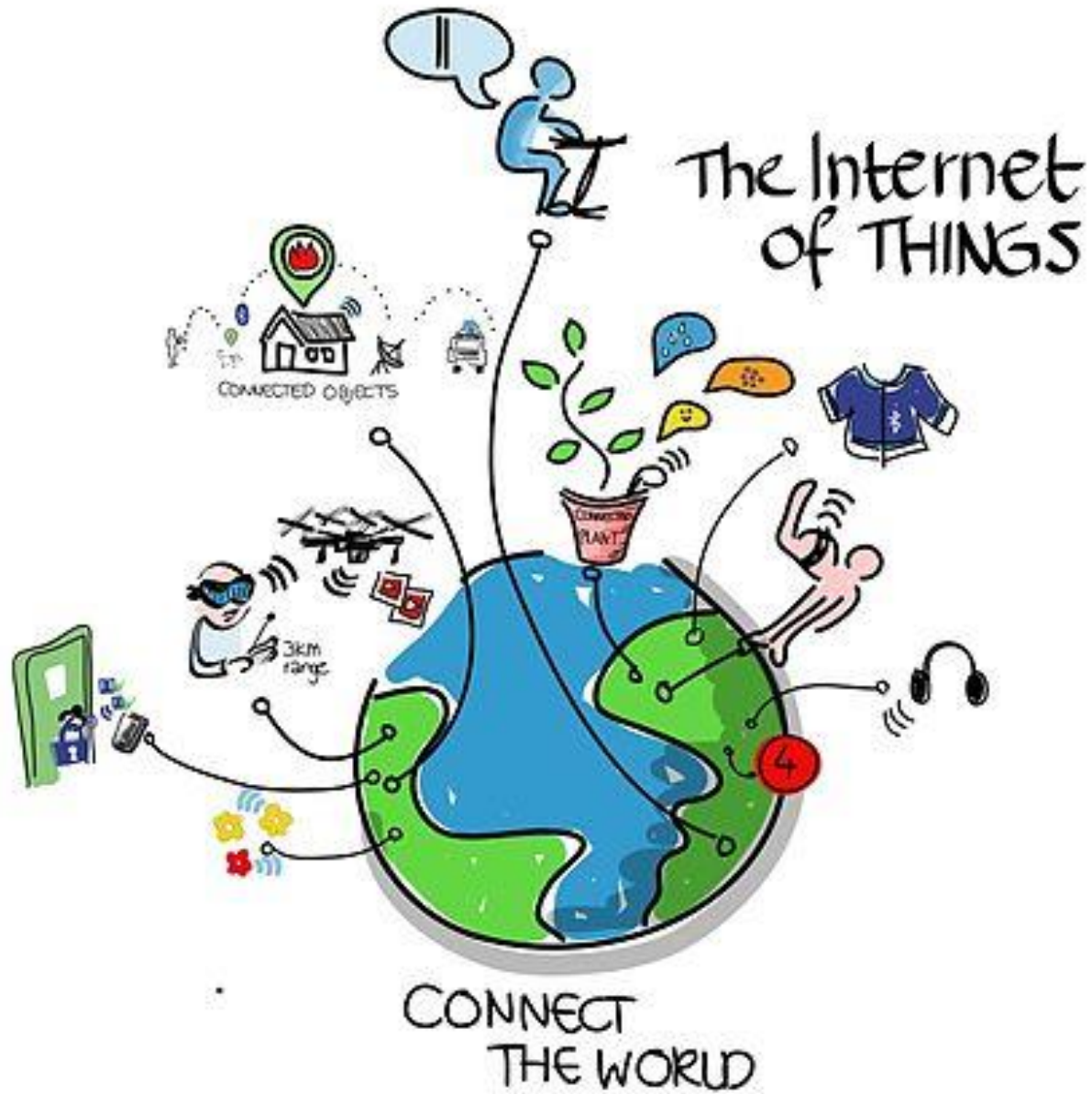
Source: TravelClick Agency360. As of December 4, 2014.

GDS | Sydney Revenue



Source: TravelClick Agency360. As of December 4, 2014.

*Preparing
for
The Future*



New Entrants / New Challenges

AIRBNB

www.airbnb.com

August 2008

Brian Chesky, Joe Gebbia, and Nathan Blecharczyk found Airbnb.

November, 2010

\$7.2 million USD in Series A funding raised from Greylock Partners and Sequoia Capital.

July 2012

There were over 200,000 listings in 26,000 cities and 192 countries.



January 2009

Airbnb was incubated by the Y Combinator seed accelerator company.

May 2011

Ashton Kutcher invested in the company and came on board as a strategic brand adviser.





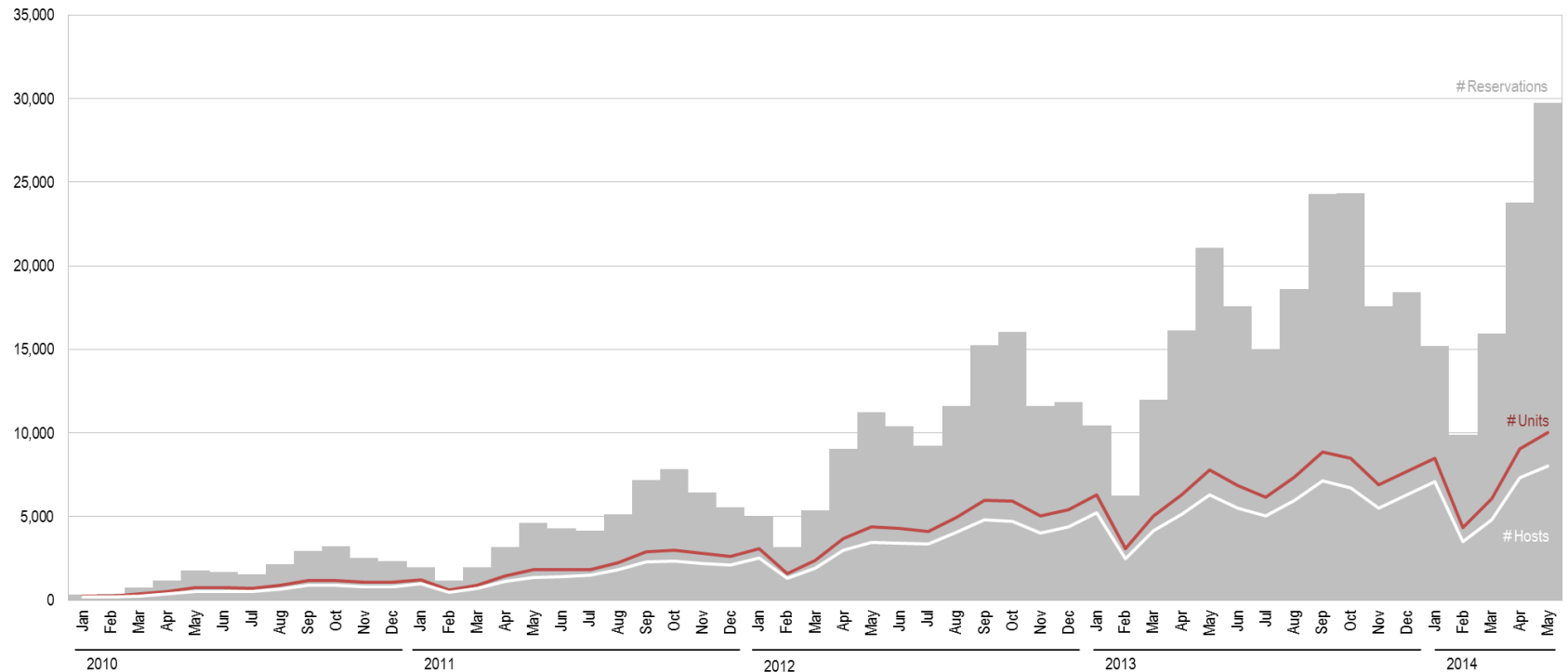
Airbnb in the city

From the Office of:
New York State Attorney General
Eric T. Schneiderman

A white silhouette of a city skyline, including several skyscrapers, set against a red background.

October 2014

Growth of Airbnb in New York 2010 - 2014



Private Short-Term Rentals in New York City Incurred Over \$33 Million in Hotel Tax Liability

2010	\$961,378
2011	\$3,079,250
2012	\$7,797,270
2013	\$14,221,841
2014	\$7,407,413*
Total	\$33,467,152

Source: Airbnb Data, (2010-2014) Year Hotel Room Occupancy Taxes

*2014 Tax Liability through 6/2/14

Thank You

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