



TravelClick®

Canberra Market Update – GDS

HSMAI
4 Mar 2015



TravelClick®

Agenda:

ADR by Channel Highlights - Global 2014

GDS Historical YOY performance - Global

Australia and Canberra Market – GDS

Outlook for Canberra – GDS – Next 13 Weeks

Quick look at The Bigger Picture

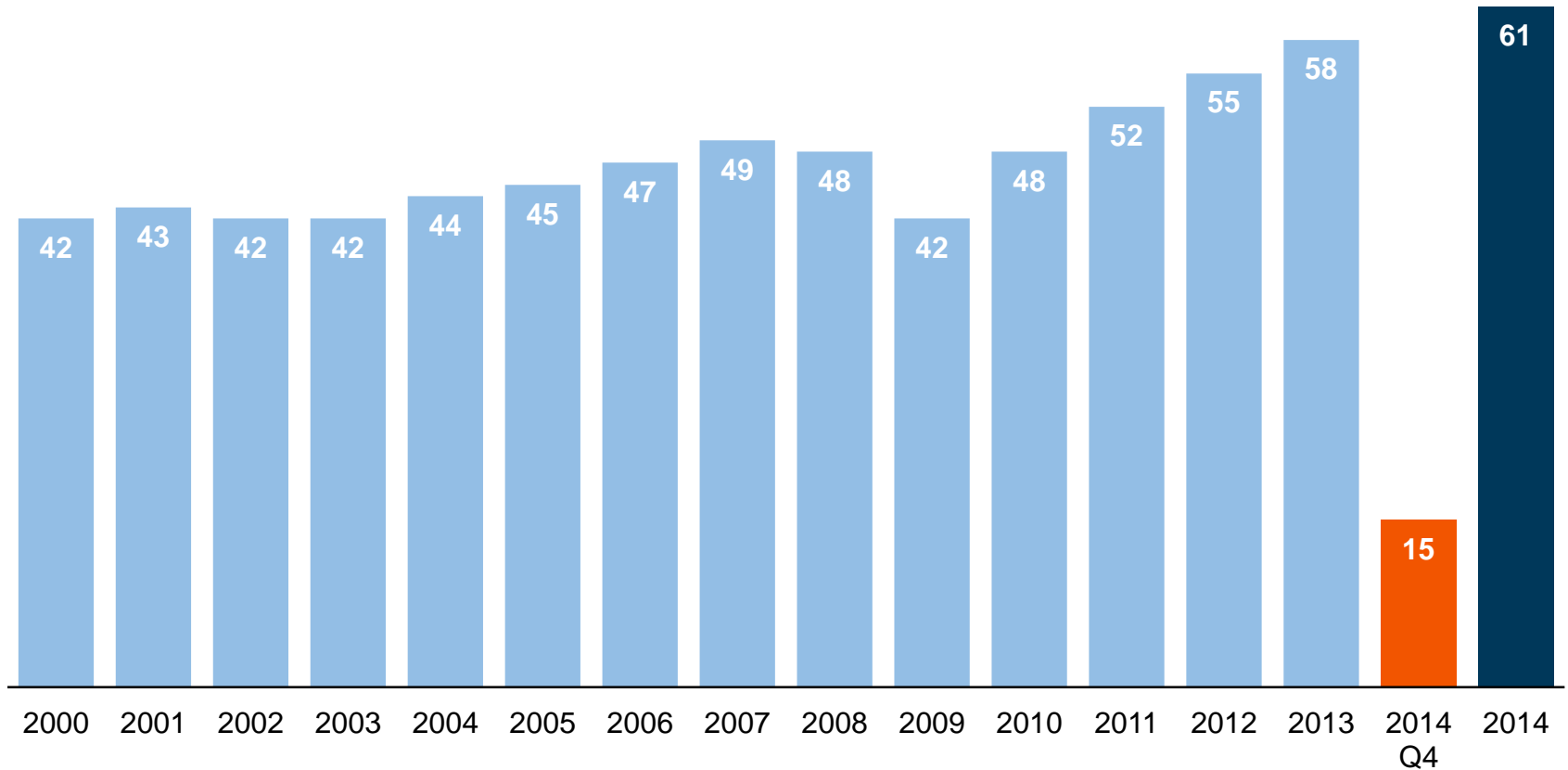
Highlights | 2014 ADR by Channel



Source: TravelClick Demand360. Top 50 markets worldwide from participating brands. Revenue in USD. Transient reservations. Full Year 2014.

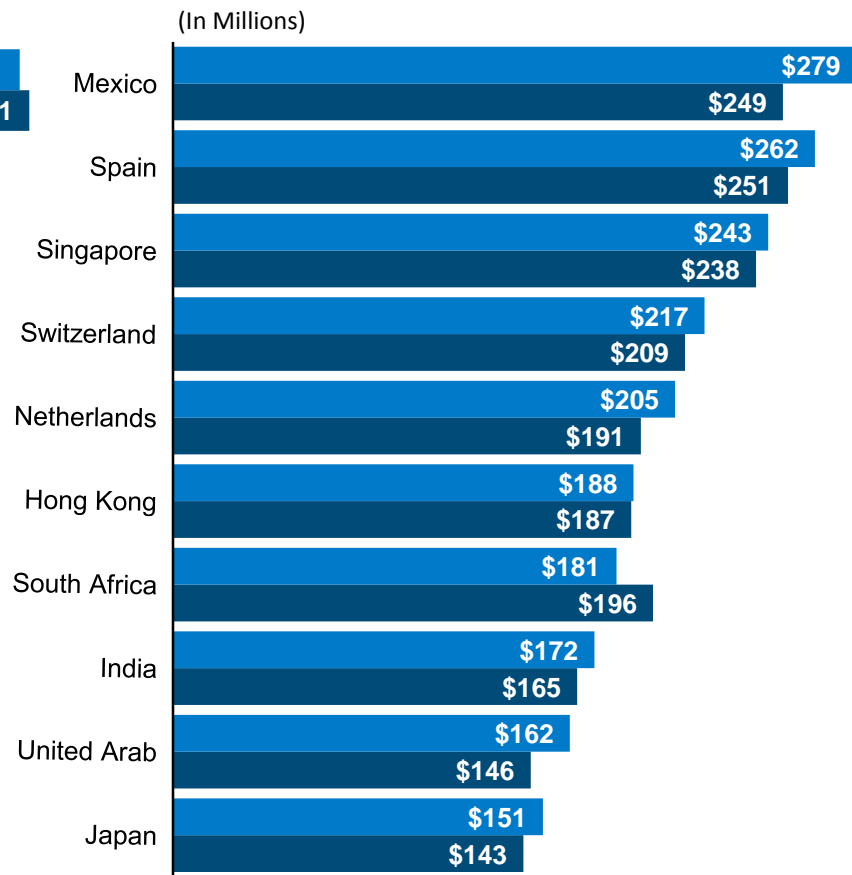
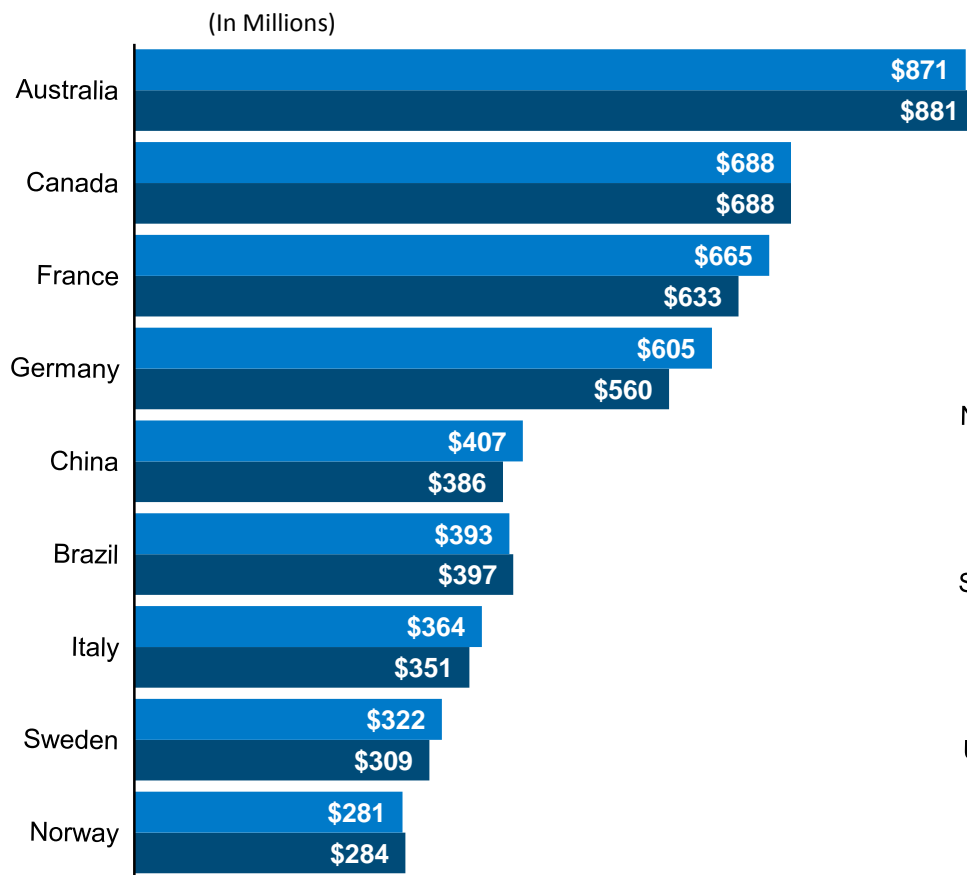
GDS | Historical Year over Year Performance

Hotel Bookings (In Millions)



Source: TravelClick Agency360. Q4 2014.

GDS | 2014 Revenue by Top 20 Countries



Source: TravelClick Agency360. Full Year 2014. USD.

Australia

Country: Australia

	Revenue	Growth	Room Nights	Growth	ADR	Growth
MTD Feb 2015	66,823,637	(12.7%)	358,835	(2.6%)	186	(10.4%)
Mar14 - Feb15	860,925,478	(1.5%)	4,298,758	4.8%	200	(6.0%)

Monthly Trends for Australia (Mar14 - Feb15)

Revenue, Room Nights and ADR

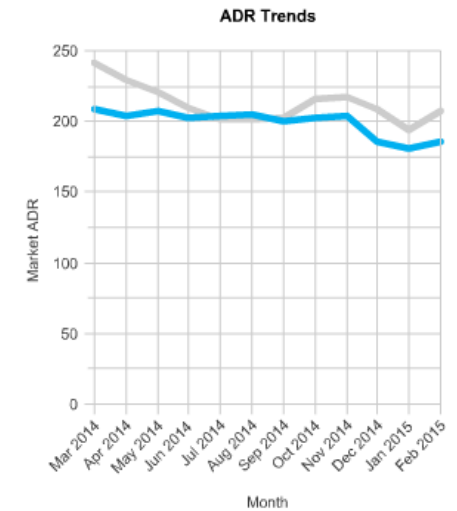
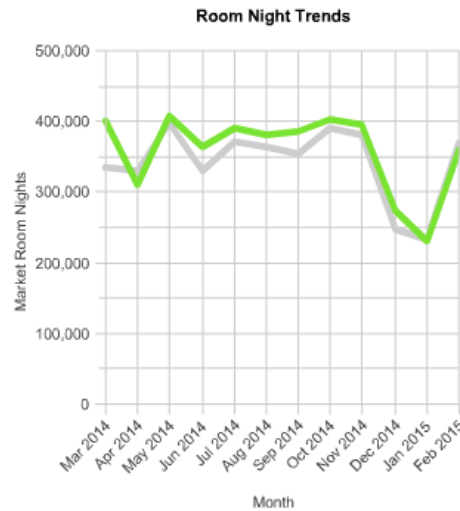
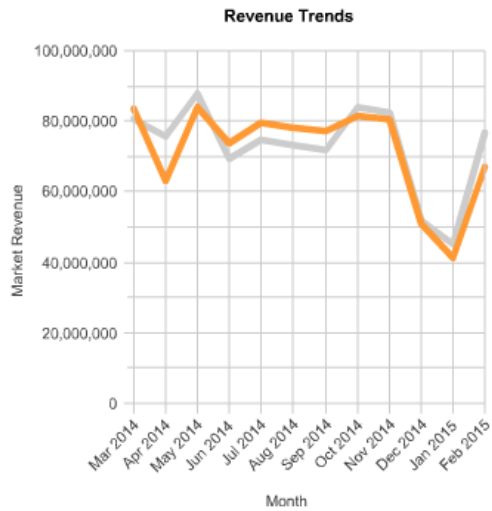
Legend

Revenue

Room Nights

ADR

Year Ago



*Figures in USD

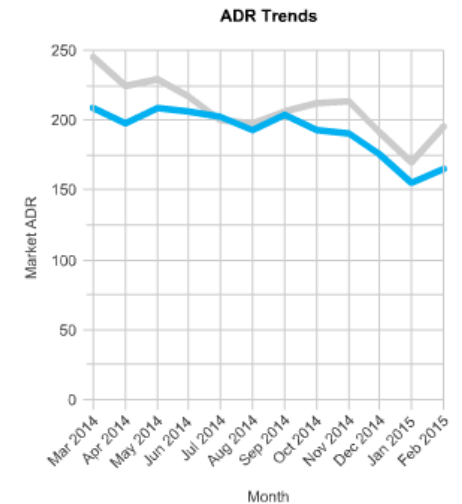
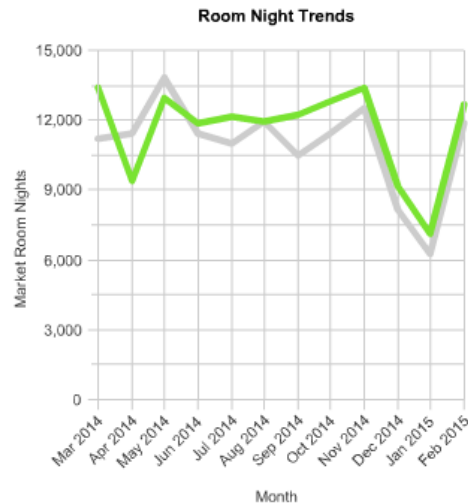
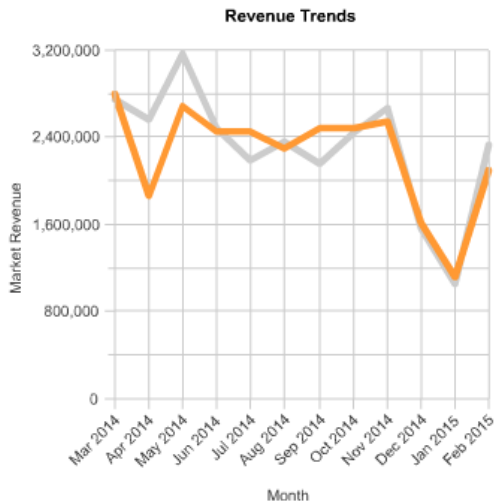
Canberra Market

Market: Canberra ACT

	Revenue	Growth	Room Nights	Growth	ADR	Growth
MTD Mar 2015	39,676	144.4%	230	164.4%	173	(7.5%)
Mar14 - Feb15	26,898,180	(3.1%)	139,130	5.7%	193	(8.3%)

Monthly Trends for the Canberra ACT Market (Mar14 - Feb15) Revenue, Room Nights and ADR

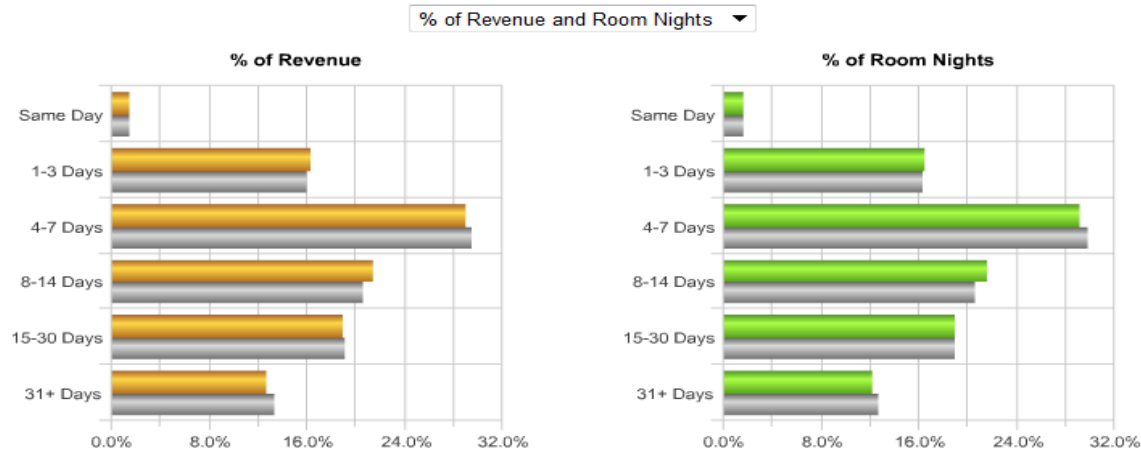
Legend



*Figures in USD

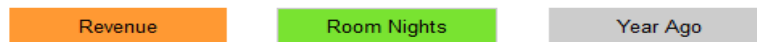
Canberra Market – Lead Time Profile

Lead Time Profile for the Canberra ACT Market (Feb14 - Jan15)
Revenue and Room Nights



Lead Time ▲	Revenue		% of Revenue		Room Nights		% of Room Nights	
	Current	Year Ago	Current	Year Ago	Current	Year Ago	Current	Year Ago
Same Day	394,813	399,577	1.5%	1.4%	2,208	2,077	1.6%	1.6%
1-3 Days	4,381,638	4,422,733	16.3%	15.9%	23,015	21,434	16.5%	16.3%
4-7 Days	7,829,139	8,208,078	29.1%	29.6%	40,528	39,204	29.1%	29.8%
8-14 Days	5,751,684	5,721,048	21.4%	20.6%	29,950	27,164	21.5%	20.6%
15-30 Days	5,124,300	5,302,225	19.1%	19.1%	26,447	24,985	19.0%	19.0%
31+ Days	3,416,606	3,692,876	12.7%	13.3%	16,982	16,807	12.2%	12.8%
Grand Total	26,898,180	27,746,537			139,130	131,671		

Legend

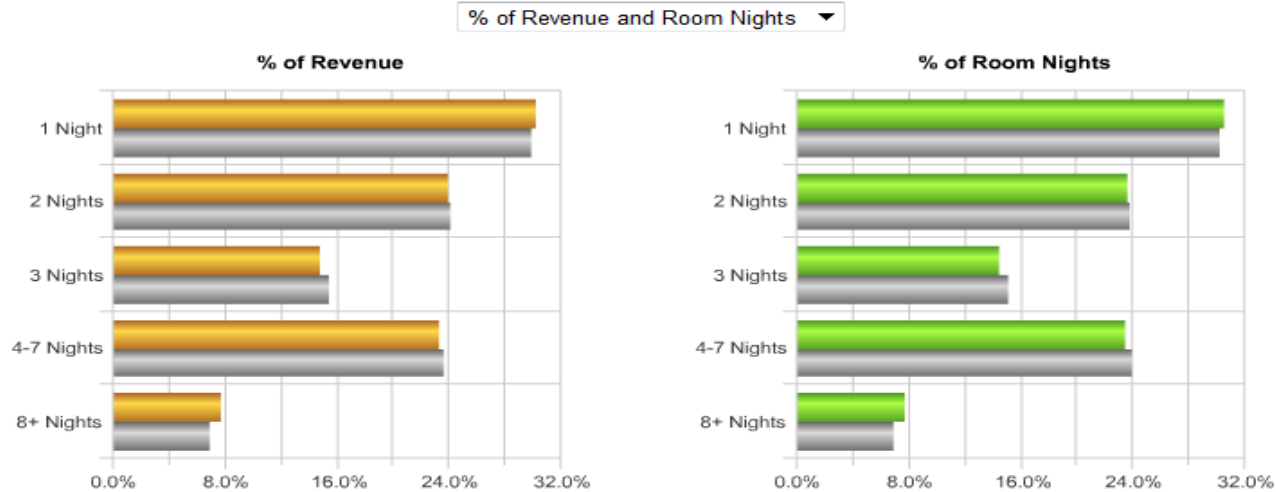


- Of the 7459 additional RN booked in past 12 mo vs the 12 mo before, 2000 of these were in the 8-14 days category!
 - As a percent of total RN booked in past 12 months, the most bookings occurred in the 4-7 days category (29.1%)
- Figures in USD

Canberra Market – LOS Profile

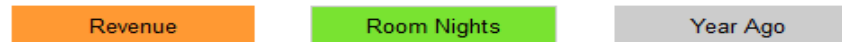
Length of Stay Profile for the Canberra ACT Market (Feb14 - Jan15)

Revenue and Room Nights



LOS ^	Revenue		% of Revenue		Room Nights		% of Room Nights	
	Current	Year Ago	Current	Year Ago	Current	Year Ago	Current	Year Ago
1 Night	8,118,328	8,295,343	30.2%	29.9%	42,455	39,777	30.5%	30.2%
2 Nights	6,460,385	6,672,831	24.0%	24.0%	32,943	31,278	23.7%	23.8%
3 Nights	3,992,114	4,271,802	14.8%	15.4%	20,212	19,950	14.5%	15.2%
4-7 Nights	6,251,080	6,567,828	23.2%	23.7%	32,694	31,460	23.5%	23.9%
8+ Nights	2,076,273	1,938,733	7.7%	7.0%	10,826	9,206	7.8%	7.0%
Grand Total	26,898,180	27,746,537			139,130	131,671		

Legend



- 30.5% of total Bookings, Trailing 12 months are 1NT stay; closely followed by 2N and 4-7 N stays
- 1620 additional RN were booked at a LOS of 8Nights and up! Similar trend in Sydney market.
- Figures in USD

Canberra Market – GDS - Next 3 Months

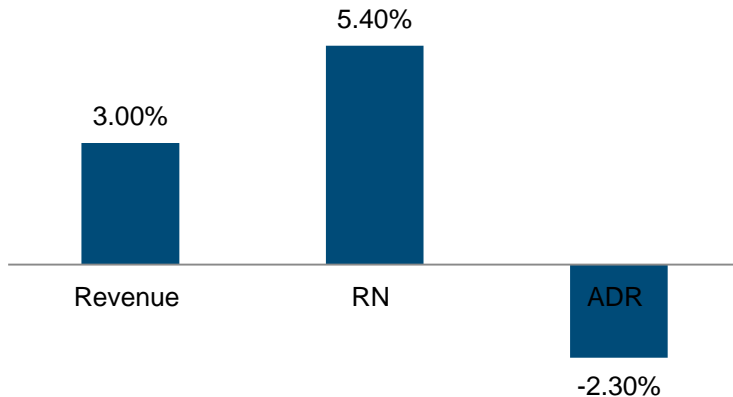
Your Performance for 02 Mar15 - 29 Mar15 vs. 02 Mar14 - 29 Mar14

	Revenue			Room Nights			ADR		
	Current	Last Year	Revenue	Current	Last Year	RN	Current	Last Year	ADR
Canberra ACT	\$1,624,938	\$1,577,923	3.00%	7,101	6,740	5.40%	\$229	\$234	-2.30%

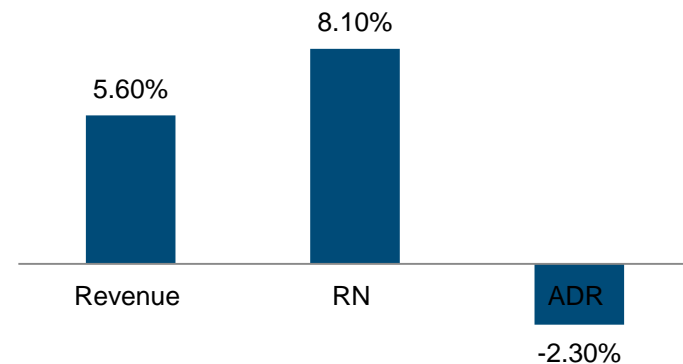
Your Performance for 02 Mar15 - 31 May15 vs. 02 Mar14 - 31 May14

	Revenue			Room Nights			ADR		
	Current	Last Year	Revenue	Current	Last Year	RN	Current	Last Year	ADR
Canberra ACT	\$2,001,268	\$1,894,926	5.60%	8,747	8,090	8.10%	\$229	\$234	-2.30%

Next 4 Weeks BOB - Growth vs LY



Next 13 Weeks BOB - Growth vs LY



- Next 4 weeks GDS looks strong vs. Same time last year (STLY) for RN and Revenue – ADR 2.3% lower than STLY.
 - 13 Weeks outlook is even more positive – again ADR is slightly lower than STLY
- Figures in AUD - Booking data updated as of Mar 01, 2015

Different Channels have different costs of acquisition

Average Booking Value=ADR x ALOS. - approx. \$470

Channel X



You keep \$453

Channel Y



You keep \$448.38

Channel Z



You keep \$406.78

*Spend and Revenue figures are for illustration only

Thank you.

Please contact Alex Leslie with any questions

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Appendix

GDS by Country and Market

GDS | 2014 Performance by Country Alphabetical

Country	Revenue \$	
	2013	2014
Afghanistan	\$106,555	\$70,363
Albania	\$1,019,689	\$1,083,383
Algeria	\$10,238,557	\$10,352,680
American Samoa	\$101,822	\$118,961
Andorra	\$268,441	\$272,775
Angola	\$4,343,720	\$5,151,776
Anguilla	\$3,688,001	\$3,512,051
Antigua and Barbuda	\$2,021,889	\$2,292,356
Argentina	\$44,889,589	\$43,385,858
Armenia	\$1,264,050	\$912,155
Aruba	\$6,400,030	\$8,427,231
Australia	\$881,354,964	\$871,232,780
Austria	\$48,833,707	\$51,759,355
Azerbaijan	\$6,817,537	\$6,857,072
Bahamas	\$12,758,579	\$12,483,500
Bahrain	\$8,879,693	\$10,614,579
Bangladesh	\$3,245,445	\$3,969,722
Barbados	\$5,488,578	\$5,553,865
Belarus	\$1,024,082	\$1,132,766
Belgium	\$114,066,321	\$114,537,671
Belize	\$750,130	\$505,423
Benin	\$574,739	\$534,025
Bermuda	\$13,094,413	\$12,540,400
Bhutan	\$25,560	\$20,740
Bolivia	\$986,716	\$1,382,955
Bosnia and Herzegovina	\$284,547	\$674,276
Botswana	\$2,159,871	\$2,034,745
Brazil	\$397,224,339	\$392,842,040
Brunei Darussalam	\$452,896	\$693,952
Bulgaria	\$4,610,465	\$5,060,150

Country	Revenue \$	
	2013	2014
Burkina Faso	\$220,628	\$126,152
Cambodia	\$2,805,929	\$2,631,063
Cameroon	\$1,781,128	\$1,733,653
Canada	\$688,370,163	\$688,147,747
Cape Verde	\$170,451	\$144,676
Cayman Islands	\$7,671,495	\$8,931,770
Chad	\$628,598	\$617,936
Chile	\$34,267,642	\$36,551,761
China	\$386,078,438	\$407,406,644
Colombia	\$34,909,235	\$38,298,408
Comoros	\$37,153	\$41,155
Congo	\$109,013	\$403,176
Congo, The Democratic Republic of the	\$1,210,996	\$1,230,531
Cook Islands	\$74,033	\$48,969
Costa Rica	\$18,501,876	\$19,042,472
Cote D'Ivoire	\$2,175,222	\$2,170,780
Croatia	\$5,843,035	\$6,595,496
Cuba	\$176,158	\$272,260
Curacao	\$12,579	\$12,384
Cyprus	\$3,568,381	\$3,214,050
Czech Republic	\$30,446,769	\$31,845,253
Denmark	\$92,510,554	\$102,670,552
Djibouti	\$887,482	\$691,409
Dominica	\$59,065	\$62,803
Dominican Republic	\$9,385,210	\$10,153,931
Ecuador	\$7,456,925	\$7,860,797
Egypt	\$10,068,774	\$11,944,090
El Salvador	\$3,325,699	\$3,029,844
Equatorial Guinea	\$525,297	\$729,535
Estonia	\$4,157,123	\$4,353,408

Source: TravelClick Agency360. Full Year 2014. Revenue in USD.

GDS | 2014 Performance by Market in South Pacific

Market	2013		2014	
	Room Nights	Revenue \$	Room Nights	Revenue \$
Adelaide	210,775	37,493,641	219,785	37,094,757
Albion	6,289	1,237,235	11,081	2,135,675
Ascot	10,329	2,409,783	11,924	2,443,983
Ashgrove	17,050	4,336,485	16,042	3,959,027
Auckland	256,933	39,632,282	273,546	43,965,486
Auckland Airport	15,046	2,718,622	16,664	3,197,996
Braddon	20,686	4,309,619	19,070	3,557,418
Brisbane	360,968	82,279,041	368,980	76,884,232
Broadbeach	12,751	2,630,103	12,487	2,517,099
Cairns	49,369	7,824,815	48,163	7,425,934
Canberra	76,082	17,030,027	77,991	16,169,914
Chatswood	13,399	3,105,485	12,582	2,738,478
Christchurch	44,355	6,941,723	64,703	10,112,684
Darwin	94,346	20,016,003	93,161	19,321,813
Docklands	49,977	10,616,119	52,409	10,515,388
Dunedin	19,068	2,472,672	20,847	2,818,556
East Perth	78,209	20,915,671	73,812	17,599,476
Fortitude Valley	10,298	1,780,899	14,951	2,501,324
Fremantle	18,418	4,673,441	19,801	4,580,631
Gladstone	13,972	2,904,761	18,889	3,145,887
Glen Waverley	14,701	2,748,490	16,894	3,051,500
Guam	13,055	2,474,133	17,610	3,634,007
Hamilton	27,313	3,309,541	31,369	3,883,649
Haymarket	14,585	2,865,303	16,175	3,060,406
Hobart	33,631	5,685,481	31,590	5,131,448
Kangaroo Point	12,959	2,470,428	13,776	2,425,002

Market	2013		2014	
	Room Nights	Revenue \$	Room Nights	Revenue \$
Karratha	11,165	3,418,789	15,348	4,015,865
Launceston	17,956	2,644,815	19,834	2,816,547
Mackay	18,098	3,896,726	25,903	4,608,336
Macquarie Park	33,001	7,485,322	42,481	8,583,410
Mascot	11,972	2,309,125	14,721	2,721,386
Melbourne	521,208	113,459,817	562,495	116,950,353
Newcastle	28,263	5,623,487	27,664	5,212,795
North Sydney	14,381	2,973,340	13,721	2,718,757
Parramatta	47,797	9,721,467	53,741	10,406,101
Perth	352,338	91,364,990	343,010	80,030,775
Port Hedland	4,937	1,646,487	9,587	2,371,640
Port Moresby	15,538	5,357,805	15,851	4,578,321
Pymont	26,866	6,464,876	29,873	6,594,510
Rockhampton	16,891	2,746,799	23,567	3,780,597
Scarborough	18,153	4,008,908	17,327	3,490,847
South Brisbane	29,098	7,064,326	25,340	5,666,681
South Wharf	28,299	7,254,924	24,116	6,133,549
South Yarra	15,387	3,225,164	19,998	3,909,836
Southbank	73,542	18,275,115	78,551	18,241,011
Spring Hill	30,577	5,695,137	29,175	4,966,997
Surfers Paradise	15,609	2,892,222	15,056	2,713,785
Surry Hills	13,849	2,746,006	11,088	2,143,435
Sydney	712,949	179,864,540	741,674	178,922,324
The Rocks	26,516	9,070,274	27,440	9,163,339
Townsville	43,684	6,227,567	46,509	6,234,713
Wellington	153,481	22,630,251	160,993	24,832,336

Source: TravelClick Agency360. Full Year 2014. Revenue in USD. Markets >4,000 room nights annually.

GDS | 2014 Performance by Market in Asia

Market	2013		2014	
	Room Nights	Revenue \$	Room Nights	Revenue \$
Almaty	19,002	4,400,582	21,065	4,480,980
Astana	12,009	3,663,907	15,649	4,172,800
Baku	25,276	5,674,038	31,405	6,837,799
Bangalore	168,722	24,159,457	199,846	26,098,143
Bangkok	223,338	31,046,274	192,754	24,665,456
Beijing	625,411	100,817,804	610,060	96,866,482
Bengaluru	152,310	18,616,408	164,330	18,518,277
Chengdu	65,748	7,853,900	72,178	8,059,515
Chennai	137,033	15,374,336	151,200	15,207,389
Chiyoda	21,953	9,980,205	20,231	9,140,246
Chongqing	53,689	4,769,996	64,074	5,751,166
Dhaka	14,690	3,245,445	16,848	3,969,722
Guangzhou	141,755	20,487,787	148,761	20,776,793
Gurgaon	114,529	17,320,973	131,174	18,484,799
Hangzhou	41,287	5,383,345	53,929	6,648,747
Hanoi	37,502	5,705,421	66,049	8,683,424
Ho Chi Minh City	54,752	9,874,596	61,190	10,920,722
Hong Kong	539,993	168,000,622	536,925	169,742,821
Hyderabad	101,916	11,217,238	120,715	12,840,432
Jakarta	117,103	19,088,628	131,185	20,952,758
Jakarta Capital Region	54,226	9,685,400	51,799	9,391,813
Jhongheng District	30,911	7,962,173	35,206	9,044,541
Kowloon	89,891	23,813,619	85,582	22,820,166
Kuala Lumpur	280,366	38,772,233	306,837	41,779,880
Lumphini	32,404	6,139,872	24,607	4,403,276

Market	2013		2014	
	Room Nights	Revenue \$	Room Nights	Revenue \$
Macau	26,859	5,061,272	22,413	4,953,183
Makati	30,998	5,219,441	29,395	4,892,832
Makati City	30,784	4,628,915	36,463	5,722,327
Male	4,355	4,935,830	4,361	5,000,299
Manila	143,994	25,786,543	144,184	25,195,340
Minato	69,363	17,738,669	82,399	20,799,334
Moscow	298,765	89,032,196	269,520	65,593,970
Mumbai	232,365	35,102,467	251,070	35,696,178
Nanjing	46,705	4,697,248	45,040	4,690,420
New Delhi	96,980	16,951,115	98,432	15,771,650
Pune	108,480	9,950,121	131,975	11,551,444
Saint Petersburg	34,478	8,229,852	36,151	7,126,818
Seoul	266,791	60,428,236	297,341	68,948,812
Shanghai	841,004	143,339,079	913,377	154,507,793
Shenzhen	213,167	31,037,789	233,904	33,880,153
Singapore	956,007	237,353,771	974,104	242,938,665
St Petersburg	24,640	5,013,405	22,742	3,758,919
Suzhou	86,934	9,364,059	113,253	12,354,074
Taipei	140,247	29,221,634	145,481	30,872,780
Tianjin	38,069	4,101,095	39,154	4,197,357
Tokyo	340,196	85,150,711	351,747	85,738,908
Xian	23,377	2,875,215	31,059	3,996,869
Yokohama	31,043	5,544,693	35,467	6,428,637
Zhubei City	28,618	3,850,509	32,297	4,467,513
Zhubei City	7,278	968,317	8,782	1,186,515

Source: TravelClick Agency360. Full Year 2014. Revenue in USD. Markets >4000 room nights annually.