



Christopher Zindash
Director of Sales, Southeast Region

Visit Annapolis & Anne Arundel County
Lodging Roundtable – Navigating 2020
June 2, 2020

SHAPING THE FUTURE OF
HOSPITALITY

TravelClick
an amadeus company

Agenda



TravelClick, an Amadeus Company

Who we are and our solutions

Market Outlook

North America Markets / Maryland, Annapolis, AAC

Reopening America

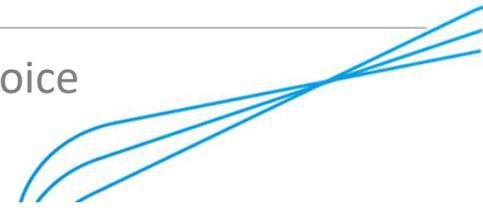
Getting ready for the “Careful” Economy

TRUST, the new loyalty

Expectations on the new normal

Q & A

Feel free to add to the chat or voice



We exist to enhance the guest experience, drive loyalty, and increase profitability.



We're here to make the hospitality industry run smoothly by enabling our partners to create memorable guest experiences

We provide a platform of capabilities that adapts to every customer's needs to drive demand, guest loyalty and profitability

Who we are

We use data, innovation and the expertise of our people to create transformative technologies to enable frictionless guest journeys

TravelClick's Integration

5 lines of integrated business solutions work together to drive revenue to your hotel.



BUSINESS INTELLIGENCE

- Rate360®
- Agency360®
- Demand360®
- Enterprise Solutions™



WEB & VIDEO SOLUTIONS

- Responsive Websites
- Search Engine Optimization
- Social Media Optimization
- Video Solutions



RESERVATIONS SOLUTIONS

- iHotelier® Central Reservation System™
- iHotelier® Booking Engine 4.0™
- iHotelier® GDS & ODD
- TravelClick Channel Management™
- iHotelier® OTA Sync™
- iHotelier® VoicePro™
- iHotelier® Demand Services™
- iHotelier® PMS Integrations™



GUEST MANAGEMENT

- Complete picture of guest behavior
- Targeted E-Mail Campaigns



MEDIA SOLUTIONS

- Single Media Subscription
- Sabre Spotlight
- Travelport Featured Property

Market Outlook



Occupancy % Last Year versus This Year

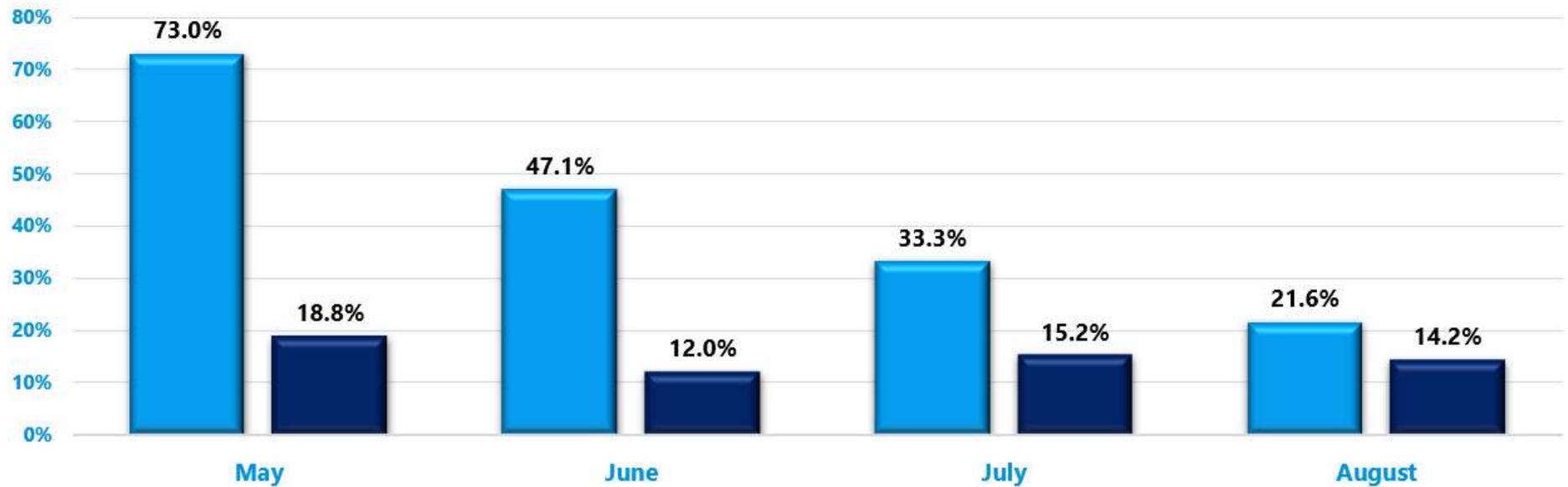


Occupancy %*

last year versus this year
as of the beginning of the month

United States - All markets

■ Last Year ■ This Year



* First month reflects Sold (Transient /Group); subsequent months reflect Sold (Transient /Group) + Unsold Blocks

Customer Segmentation (Sold) – This Year versus Last Year

| | 3/1/2020 | | 3/16/2020 | | 4.1.2020 | | 4.19.2020 | | 5.3.2020 | | 5.17.2020 | | 5.24.2020 | |
|-----------------------------|--------------------------------|-------|--------------------------------|-------|--------------------------------|-------|--------------------------------|-------|--------------------------------|--------|--------------------------------|--------|--------------------------------|--------|
| United States - All markets | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | |
| | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | |
| | OCC | ADR | OCC | ADR | OCC | ADR |
| Group | -0.3% | 1.4% | -0.3% | 1.4% | -24.6% | -0.8% | -24.5% | -0.8% | -52.9% | -5.4% | -52.9% | -5.4% | -52.9% | -5.4% |
| Transient | 0.7% | 0.4% | 0.7% | 0.4% | -18.2% | -4.0% | -18.1% | -4.1% | -44.9% | -10.5% | -44.9% | -10.4% | -44.9% | -10.4% |
| Discount | 5.5% | 1.5% | 5.6% | 1.4% | -15.5% | -3.6% | -15.4% | -3.7% | -46.1% | -10.5% | -46.1% | -10.5% | -46.1% | -10.5% |
| Negotiated | -3.0% | 1.0% | -2.9% | 1.1% | -22.1% | -3.2% | -22.0% | -3.2% | -46.6% | -9.8% | -46.6% | -9.8% | -46.6% | -9.8% |
| Qualified | 0.6% | 0.2% | 0.6% | 0.2% | -18.0% | -3.5% | -17.9% | -3.5% | -45.6% | -8.5% | -45.6% | -8.5% | -45.6% | -8.5% |
| Retail | -0.2% | 0.0% | -0.2% | 0.0% | -18.5% | -4.6% | -18.4% | -4.7% | -44.2% | -11.6% | -44.2% | -11.6% | -44.2% | -11.5% |
| Wholesale | 3.6% | -1.0% | 3.8% | -1.0% | -18.2% | -2.3% | -18.5% | -2.2% | -51.8% | -6.7% | -51.8% | -6.6% | -51.8% | -6.5% |

| | 3/1/2020 | | 3/16/2020 | | 4.1.2020 | | 4.19.2020 | | 5.3.2020 | | 5.17.2020 | | 5.24.2020 | |
|-----------------------------|---|-------|---|-------|---|--------|---|--------|---|--------|---|--------|---|--------|
| United States - All markets | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | |
| | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | |
| | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR |
| Group | -0.7% | 0.7% | -50.7% | -6.2% | -75.3% | -14.5% | -82.7% | -25.2% | -78.7% | -20.1% | -83.5% | -28.3% | -84.3% | -32.1% |
| Transient | -3.1% | -0.3% | -34.1% | -7.1% | -65.3% | -10.2% | -76.5% | -21.2% | -70.3% | -15.4% | -71.7% | -25.3% | -70.8% | -28.1% |
| Discount | 1.6% | -0.3% | -32.0% | -5.3% | -67.2% | -6.5% | -79.6% | -19.5% | -73.4% | -8.9% | -75.0% | -21.1% | -74.4% | -25.1% |
| Negotiated | -6.4% | 0.7% | -40.9% | -8.6% | -69.5% | -17.7% | -76.5% | -28.8% | -72.7% | -25.5% | -74.3% | -32.2% | -74.2% | -33.9% |
| Qualified | -2.3% | 1.0% | -31.6% | -5.3% | -63.3% | -5.2% | -75.6% | -13.7% | -66.0% | -16.0% | -67.5% | -25.3% | -66.7% | -27.3% |
| Retail | -5.6% | 0.0% | -35.2% | -7.5% | -66.5% | -8.1% | -76.7% | -20.7% | -71.0% | -13.0% | -70.3% | -25.3% | -68.4% | -28.4% |
| Wholesale | -7.3% | -0.3% | -30.3% | -2.3% | -61.9% | -3.9% | -78.6% | -3.8% | -70.5% | 0.4% | -78.6% | -5.6% | -81.3% | -12.0% |

Source: TravelClick Demand360.

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Occupancy % Last Year versus This Year-Transient and Group*

Occupancy % for Transient/Group*

last year versus this year
as of the beginning of the month

United States - Baltimore

■ Transient ■ Group



* First month reflects Sold (Transient /Group); subsequent months reflect Sold (Transient /Group) + Unsold Block

Source: TravelClick Demand360. Transient and Group Rooms Sold + Unsold Blocks.

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Customer Segmentation (Sold) – This Year versus Last Year

| United States - Baltimore | 3/1/2020 | | 3/16/2020 | | 4.1.2020 | | 4.19.2020 | | 5.3.2020 | | 5.10.2020 | | 5.24.2020 | |
|---------------------------|--------------------------------|------|--------------------------------|-------|--------------------------------|-------|--------------------------------|-------|--------------------------------|--------|--------------------------------|--------|--------------------------------|--------|
| | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | |
| | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | |
| | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR |
| Group | -0.1% | 1.6% | 0.4% | 2.0% | -30.6% | -8.9% | -30.5% | -8.9% | -58.5% | -17.1% | -58.5% | -17.1% | -58.5% | -17.1% |
| Transient | 5.2% | 1.8% | 4.8% | 1.6% | -15.3% | -2.1% | -15.1% | -2.1% | -43.0% | -9.5% | -43.0% | -9.5% | -43.0% | -9.5% |
| Discount | 13.2% | 8.3% | 13.1% | 8.4% | -9.9% | 3.5% | -9.8% | 3.7% | -43.6% | -6.9% | -43.6% | -6.9% | -43.6% | -6.9% |
| Negotiated | 7.7% | 0.4% | 6.4% | -0.2% | -15.4% | -2.8% | -15.2% | -2.8% | -41.5% | -8.4% | -41.5% | -8.5% | -41.5% | -8.5% |
| Qualified | 2.6% | 0.5% | 2.6% | 0.4% | -18.2% | -2.7% | -18.1% | -2.7% | -46.6% | -8.9% | -46.6% | -8.9% | -46.6% | -8.9% |
| Retail | -0.2% | 1.3% | -0.4% | 1.4% | -18.1% | -3.0% | -17.9% | -3.2% | -43.5% | -11.6% | -43.5% | -11.6% | -43.5% | -11.5% |
| Wholesale | 42.6% | 2.4% | 42.7% | 2.4% | -3.4% | -3.2% | -3.4% | -3.3% | -48.7% | -12.0% | -48.7% | -12.0% | -48.7% | -12.0% |

| United States - Baltimore | 3/1/2020 | | 3/16/2020 | | 4.1.2020 | | 4.19.2020 | | 5.3.2020 | | 5.10.2020 | | 5.24.2020 | |
|---------------------------|---|-------|---|--------|---|--------|---|--------|---|--------|---|--------|---|--------|
| | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | |
| | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | |
| | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR |
| Group | -5.4% | -7.8% | -52.9% | -10.0% | -74.3% | -12.6% | -83.1% | -18.8% | -75.4% | -19.3% | -79.1% | -23.7% | -85.9% | -28.4% |
| Transient | -1.0% | -0.7% | -33.6% | -4.0% | -65.2% | -1.1% | -75.3% | -11.9% | -70.3% | -11.4% | -71.9% | -16.7% | -70.5% | -27.5% |
| Discount | 6.0% | 4.0% | -28.9% | -0.7% | -67.2% | 1.4% | -79.5% | -15.4% | -76.7% | -8.4% | -78.7% | -13.3% | -74.1% | -38.6% |
| Negotiated | 1.6% | -1.4% | -33.6% | -5.4% | -65.1% | -9.2% | -72.8% | -17.7% | -69.8% | -19.0% | -71.0% | -21.6% | -71.3% | -25.0% |
| Qualified | -5.1% | -2.5% | -38.3% | -2.9% | -69.3% | -0.3% | -79.0% | -8.7% | -69.8% | -19.7% | -72.2% | -25.1% | -71.7% | -33.8% |
| Retail | -5.4% | -0.2% | -34.9% | -4.5% | -63.4% | 1.1% | -73.3% | -10.8% | -67.7% | -6.8% | -69.3% | -13.1% | -67.8% | -23.5% |
| Wholesale | -21.2% | 6.2% | -42.5% | -1.0% | -69.5% | 6.1% | -84.1% | 2.1% | -83.1% | 1.6% | -83.9% | -3.5% | -85.1% | -14.7% |

Source: TravelClick Demand360.

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Occupancy % Last Year versus This Year-Transient and Group*

Occupancy % for Transient/Group*

last year versus this year
as of the beginning of the month

United States - Washington DC

■ Transient ■ Group



* First month reflects Sold (Transient /Group); subsequent months reflect Sold (Transient /Group) + Unsold Block

Source: TravelClick Demand360. Transient and Group Rooms Sold + Unsold Blocks.

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Customer Segmentation (Sold) – This Year versus Last Year

| United States - Washington DC | 3/1/2020 | | 3/16/2020 | | 4.1.2020 | | 4.26.2020 | | 5.3.2020 | | 5.17.2020 | | 5.24.2020 | |
|-------------------------------|--------------------------------|-------|--------------------------------|-------|--------------------------------|--------|--------------------------------|--------|--------------------------------|--------|--------------------------------|--------|--------------------------------|--------|
| | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | | Prior Three Months vs Year Ago | |
| | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | |
| | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR |
| Group | -2.3% | 1.1% | -2.4% | 1.1% | -30.1% | -5.3% | -30.0% | -5.4% | -60.4% | -7.4% | -60.4% | -7.4% | -60.4% | -7.4% |
| Transient | 4.9% | 1.1% | 5.0% | 1.1% | -17.4% | -6.9% | -17.4% | -7.0% | -48.6% | -15.5% | -48.6% | -15.5% | -48.6% | -15.5% |
| Discount | 8.0% | 1.1% | 8.0% | 1.2% | -18.1% | -7.1% | -18.1% | -7.1% | -52.4% | -15.7% | -52.4% | -15.7% | -52.4% | -15.7% |
| Negotiated | 5.3% | 0.6% | 5.8% | 0.6% | -19.5% | -6.4% | -19.7% | -6.5% | -48.7% | -15.8% | -48.7% | -15.8% | -48.7% | -15.8% |
| Qualified | 7.8% | 3.6% | 7.8% | 3.6% | -15.4% | -4.8% | -15.4% | -4.7% | -48.4% | -11.3% | -48.3% | -11.3% | -48.3% | -11.3% |
| Retail | 0.7% | 0.9% | 0.8% | 0.9% | -17.9% | -8.1% | -17.9% | -8.1% | -47.3% | -18.0% | -47.3% | -18.0% | -47.4% | -18.0% |
| Wholesale | 11.4% | -7.8% | 11.5% | -7.7% | -22.2% | -14.9% | -22.1% | -14.9% | -63.2% | -19.6% | -63.2% | -19.7% | -63.2% | -19.6% |

| United States - Washington DC | 3/1/2020 | | 3/16/2020 | | 4.1.2020 | | 4.26.2020 | | 5.3.2020 | | 5.17.2020 | | 5.24.2020 | |
|-------------------------------|---|------|---|-------|---|--------|---|--------|---|--------|---|--------|---|--------|
| | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | | Current and Next Two Months vs Year Ago | |
| | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | | % Change | |
| | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR | OCC | ADR |
| Group | -0.6% | 0.9% | -56.8% | -5.0% | -84.1% | -12.0% | -93.1% | -18.0% | -88.5% | -33.6% | -92.1% | -43.2% | -93.1% | -47.3% |
| Transient | -2.4% | 2.7% | -40.6% | -5.4% | -70.2% | -9.3% | -81.6% | -27.6% | -76.0% | -20.7% | -78.2% | -33.1% | -78.6% | -36.4% |
| Discount | 1.4% | 3.3% | -40.9% | -3.2% | -74.3% | -4.6% | -85.6% | -26.4% | -79.7% | -16.5% | -83.3% | -27.0% | -83.9% | -31.1% |
| Negotiated | 1.8% | 1.6% | -43.8% | -7.1% | -70.6% | -20.0% | -80.9% | -38.6% | -74.8% | -34.7% | -78.0% | -44.2% | -79.0% | -45.4% |
| Qualified | -1.4% | 5.4% | -39.4% | -1.8% | -68.2% | -2.5% | -81.7% | -18.6% | -74.9% | -17.9% | -78.5% | -31.1% | -79.0% | -34.5% |
| Retail | -8.4% | 2.6% | -41.8% | -6.7% | -70.1% | -11.6% | -79.7% | -30.8% | -75.4% | -20.7% | -74.3% | -35.8% | -74.1% | -39.4% |
| Wholesale | -16.9% | 3.3% | -45.0% | 3.1% | -71.0% | 5.8% | -87.8% | -1.5% | -75.4% | -4.3% | -81.9% | -12.5% | -84.6% | -17.5% |

Source: TravelClick Demand360.

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Reopening America

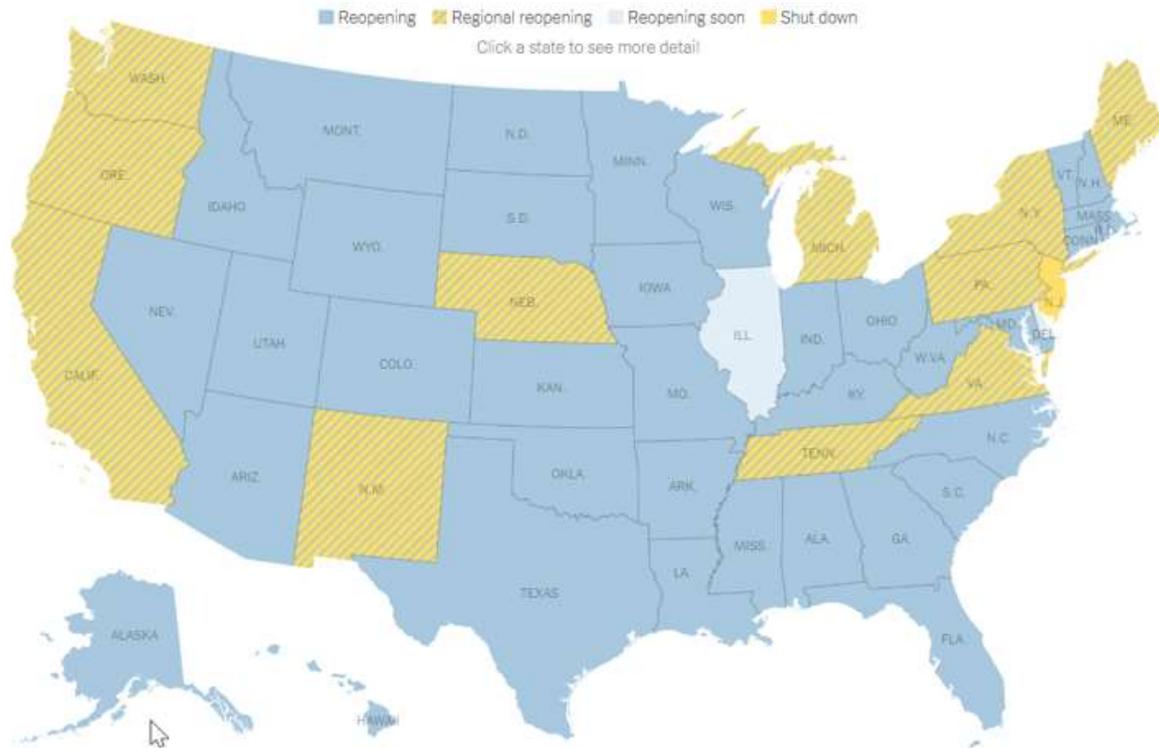
Getting ready for the “Careful” economy

Reopening has costs for businesses, employees and consumers. Americans are adaptable.



United States Reopening as of May 27, 2020

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TSA Week Over Week Three Day Trend: +30.35%

.....

5/27/2020: 261,170

5/26/2020: 264,843

5/25/2020: 340,769

Total: 866,782

5/20/2020: 230,367

5/19/2020: 190,447

5/18/2020: 244,176

Total: 664,990





TRUST
The new loyalty

COVID-19: The Numbers (NORAM)

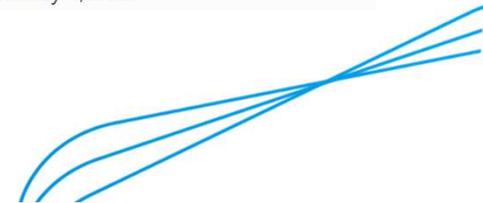


- Committed occupancy (group block + transient) is down 51.4% across all markets versus last year; Pace is down 24.3%
- Transient occupancy alone is down more than 70% versus last year; Pace is down ~35%.
- Globally, YOY bookings are down 75%
- ADR has dropped an average of 15.8% across all markets with Houston and New York experiencing the biggest declines of 23.3% and 28.8% respectively
- CBRE predictions & ADARA travel intent data

(CBRE, ADARA, NAHR/Amadeus)

The scope of the reporting:

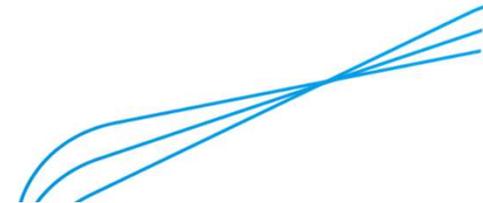
- 25 major North American markets
 - 304 million annual room nights
 - \$54 billion in annual room revenue
- Q2 2020 – Q1 2021
- As of May 1, 2020



COVID-19: The Recovery



- In the week ending May 2, the travel economy witnessed its first expansion in nine weeks
- Q1 2021 - Committed occupancy, RevPAR and ADR are all trending up, pointing to signs of a recovery
- States across the country are slowly easing restrictions
- Expanded testing, contact tracing and improved treatment options



% **Growth in new bookings** Since April 6th



U.S. Cities



U.S. Leisure Destinations

More growth found in markets **less reliant on international tourism**



European Cities

Alternative Accommodations Fastest Growing Markets

| City | Bookings: Week of 4/6 | Bookings: Week of 5/18 | % Change | Population |
|------------------------------------|-----------------------|------------------------|----------|------------|
| Big Bear Lake | 133 | 3,147 | 2266% | 5,094 |
| South Padre Island | 249 | 3,340 | 1241% | 2,885 |
| Carolina Beach | 107 | 1,178 | 1001% | 6,033 |
| Ocean City | 190 | 1,977 | 941% | 11,089 |
| Myrtle Beach | 498 | 4,735 | 851% | 119,080 |
| Galveston | 514 | 4,745 | 823% | 49,659 |
| New Braunfels | 129 | 1,116 | 765% | 78,685 |
| Lake Havasu City | 186 | 1,501 | 707% | 55,808 |
| Corpus Christi | 394 | 2,622 | 565% | 325,733 |
| Gulf Shores | 772 | 4,922 | 538% | 12,705 |

Alternative Accommodations Slowest Growing Markets

| City | Bookings: Week of 4/6 | Bookings: Week of 5/18 | % Change | Population |
|-------------------------------|-----------------------|------------------------|----------|------------|
| Philadelphia | 1,013 | 1,668 | 64.7% | 1,526,206 |
| Columbus | 523 | 847 | 62.0% | 783,285 |
| Vancouver | 632 | 1,005 | 59.0% | 675,218 |
| Boston | 275 | 421 | 53.1% | 694,583 |
| Chicago | 1,404 | 2,143 | 52.6% | 2,680,484 |
| San Francisco | 607 | 902 | 48.6% | 805,301 |
| New York | 2,812 | 3,935 | 39.9% | 8,201,658 |
| Dallas | 1,682 | 2,231 | 32.6% | 1,263,321 |
| Toronto | 1,920 | 2,305 | 20.1% | 2,930,000 |
| Montreal | 865 | 949 | 9.7% | 1,780,000 |

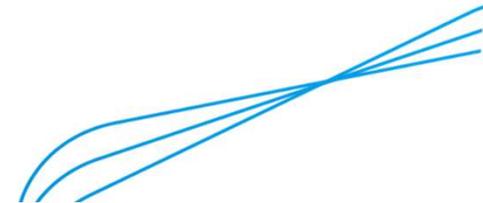
COVID-19: The Survey



Assuming stay-at-home orders are lifted June 15, how soon would you take a trip that included a domestic flight?

- _ 21.4% said “Right Away”
- _ 19.6% said “August 15”
- _ 12.2% said “Waiting on a vaccine”

(Magma Global)



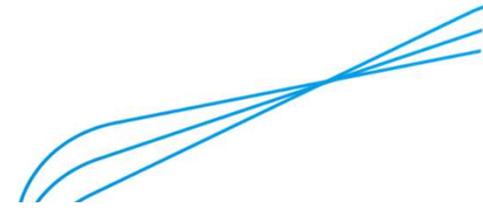
COVID-19: The Survey



Assuming stay-at-home orders are lifted June 15, how soon would you take a vacation in driving distance?

- _ 54.0% said “Right Away”
- _ 10.9% said “August 15”
- _ <5% said “Waiting on a vaccine”

(Magma Global)



Eager to Travel

.....



(Magma Global)

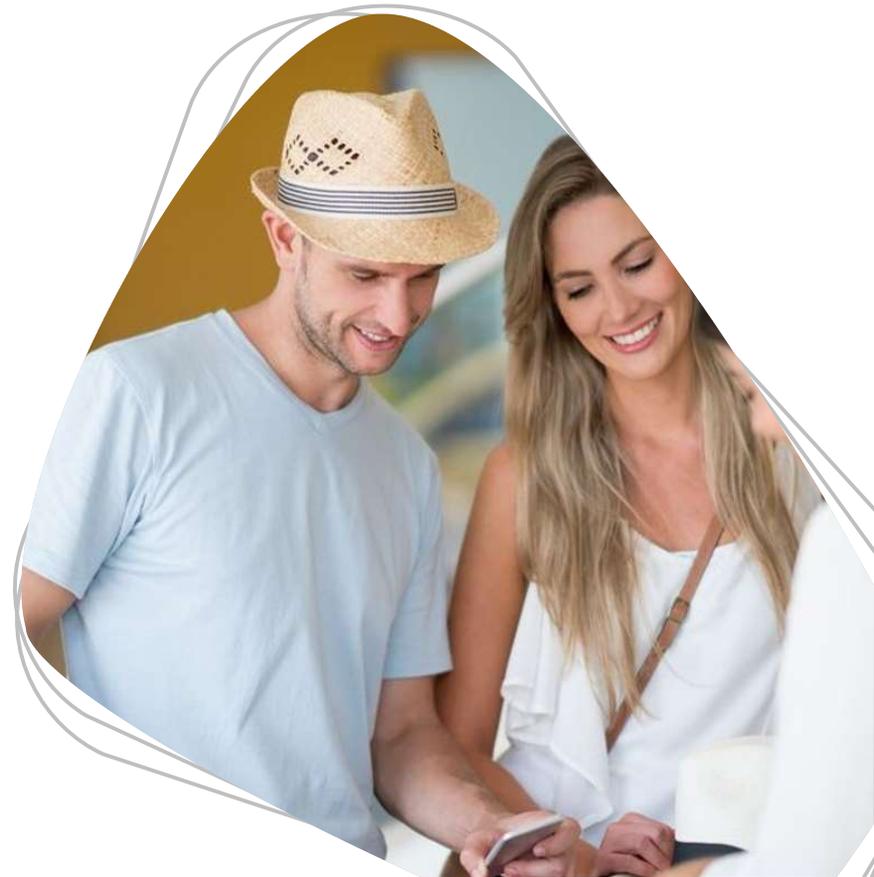


Potential Guests Must TRUST You



- Cleanliness of Rooms – 86.4%
- Hotel Cancellation Policy – 59.3%
- How Hotel Treated Staff – 43.5%
- Cost – 34.7%
- Hotel Group Brand – 30.3%

(Magma Global)



Generation Clean – The New Age of Hotel Guests



- Cleaning vs. Disinfecting
- Make it part of your brand
- Create a “cleanliness theater”
- Communicate a culture of clean

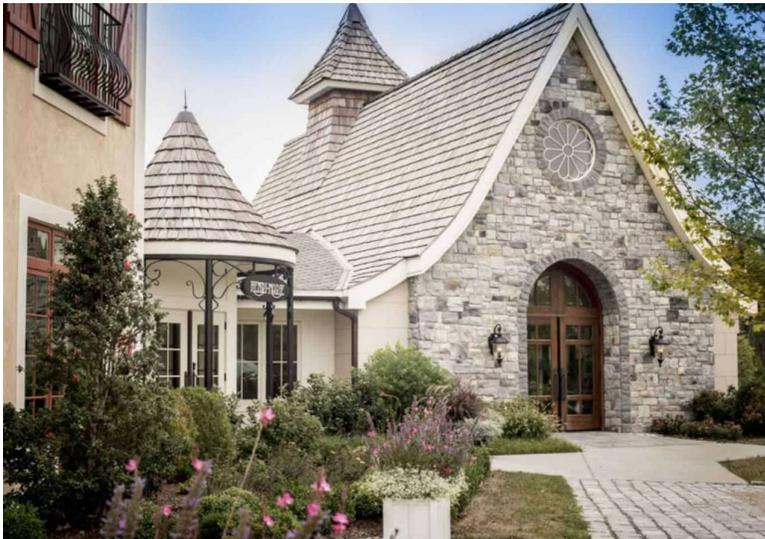
(Hospitality.net)



Generation Clean



COVID-19 Training. All employees will receive training on COVID-19 safety and sanitation protocols with more comprehensive training for our teams with frequent guest contact including Housekeeping, Food & Beverage, Spa and Fitness.



Full Protocols and Procedures



OUR COMMITMENT TO YOU

When You Return

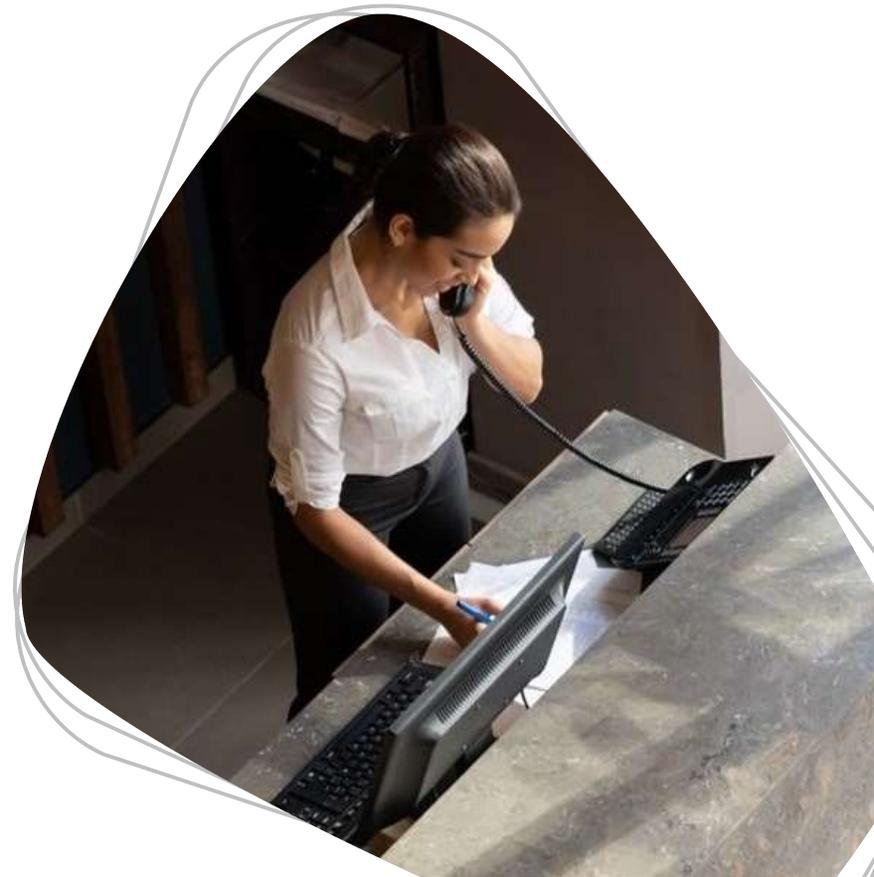
Employee & Guest Health

Temperature & Wellness Check Points. Points of entry will be limited to allow our team to conduct non-invasive temperature and wellness checks utilizing no touch thermometers. Employees, guests, members or vendors confirmed to have a temperature over 100.0°F will not be allowed entry to the property and will be directed towards appropriate medical care.

Flexible Cancellation Policy is Crucial



- Brands, Independents and OTAs
- Waive cancellation fees
- Allow cancellations to book a future stay or purchase a gift with complimentary bonus to incentivize purchase
- Establish a “Cancel Anytime” rate
- No deposit required



Questions?



Thank you!

Let's Shape the Future
of Travel Together



Christopher Zindash

Director of Sales

Southeast – MD/DC/VA/WV

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