

Travel Distribution Report

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What's the buzz? Find out at our blog, www.TravelBizBuzz.com!

Straight From The Source

Symbiotic Relationships Bring GDS Alternatives, GDSs To New Heights *A true one-stop distribution shop calls for alternative-traditional system collaboration.*

The fever for non-GDS content continues as alternative distribution system **G2 Switchworks** made the news with several deals in July, including **Garber Travel's** and **Atlas Travel International's** agreements to adopt the G2 Agent desktop for their travel agencies.

But perhaps most newsworthy is G2's involvement in a larger-scale project involving three major airlines,

Northwest/KLM, Delta and Continental, to manage the partner carriers' new SkyCorp Direct corporate travel portal. Aside from this being a good gig for G2 — and establishing yet another place GDS alternatives can fit into the distribution picture — this agreement shows that the industry is moving in an important direction, one where GDSs and GDS alternatives will be working side-by-side.

G2 And Amadeus Play Nice

When Continental, Delta and Northwest/KLM announced their SkyCorp Direct corporate travel portal (a free web-based tool designed for small and mid-sized businesses) **TDR** confirmed that both G2 Switchworks and **Amadeus** were behind the scene making things happen.

"We've contracted with G2 Switchworks, who in turn has made an agreement with Amadeus to provide some supplemental content and platform support for the tool itself,"

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**— John Slater,
Continental Airlines**

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John Slater, managing director of distribution planning and e-commerce for Continental Airlines, tells **TDR**.

Details: G2 manages the portal's operations and supplies content for the partner airlines, and Amadeus provides content for airlines outside the SkyCorp Direct partnership, in addition to car and hotel inventory and interline capability, Slater adds

"We [G2] realized we needed to get a partner on board that could supply a couple of critical pieces, namely another GDS, because we only support our private network of carriers," says **Stephen Puente**, director of implementations for G2 Switchworks.

Likewise, "we [Amadeus] have always been and continue to be open to working with industry partners where and when it makes sense to deliver the solutions and services our customers require," **Owen Wild**, director of marketing for Amadeus North America tells **TDR**.

Bottom line: In order to create a great product that satisfies the needs of the airlines' corporate customers, G2 and Amadeus were savvy enough to realize that so-called competitors can also come in quite handy as a business partners.

"We admit that we are not a one-stop-shop, but we try to make the agency one."

**— Ellen Lee,
G2 Switchworks**

Consumer Demand Prompts GDSs To Admit Need For Other Channels

Meanwhile, the GDSs themselves are hunting the "non-GDS" content treasure to keep their customers happy. For example, **Worldspan** announced July 12 that, thanks to a preferred services agreement, its U.S. and Canadian subscribers now have access to the **BookingBuilder** Desktop for shopping and booking travel products from supplier websites. (Last summer, BookingBuilder Technologies agreed to integrate G2Agent content within its Desktop.)

What's new? By not requiring payment commitments, this agreement "breaks new ground in making non-GDS content accessible to the agency community," Worldspan declared. The Desktop will extract a transaction fee.

The incentive: "BookingBuilder offers a secure interface to the sites of low-cost airlines around the world, including the most complete **Southwest Airlines** access available, several European airlines and many small airlines," detailed **Seth Perelman**, BookingBuilder Technologies CEO in the Worldspan press release.

Amadeus also made a grab for non-GDS content: Thanks to a new agreement, Amadeus' North American subscribers will have access to the BookingBuilder Desktop's shopping and booking capabilities for travel products from travel supplier websites, according to a July 20 release.

When queried as to why a GDS would supply content other than its own, Wild told **TDR** that it's all about meeting the evolving needs of one's agency customer. "Over the past cou-

ple of years there has been a change in what customers now define as critical content ... [and] our objective is to have the Amadeus GDS continuing to be the best one-stop-shop for agencies today," he explained.

Even if that means not all of the GDSs' content is home-grown.

... And G2 Admits GDS Content Is Critical

G2 Switchworks as well recognizes that it alone is not the ultimate distribution super-power, and it too will seek content from other channels to appease its agency clients. "We admit that we are not a one-stop-shop, but we try to make the *agency* one" by giving them the option of several connections, says **Ellen Lee**, VP and co-founder of G2 Switchworks.

How it works: The company is alpha testing its next version of G2 Agent, which, in addition to offering the company's private network of carriers, will facilitate GDS connections too, **Jennifer Johnston**, director of marketing for G2 Switchworks, tells **TDR**.

G2 also realizes that its core business of providing travel content to agencies is not the only thing that will keep the company afloat in the long-run.

For instance, "we're continuing our history of focusing on customer service tools," such as automated exchanges tools, or the ability to track unused electronic ticket records and apply those to new bookings, Johnston says.

So, in addition to offering agencies the option of G2 *and* GDS content, "offering a functional advantage is what we've been doing to secure our position in the marketplace," Lee declares. ■


Industry Forecast

Airlines Take Off With PayPal, Set The Cost-Cutting Stage For Other Suppliers

Avoiding credit card fees could save big bucks, but suppliers must heed their contracts.

Airlines got assertive last summer with the GDSs when it came to lowering distribution costs, and now it's the credit card companies' turn to look out. Airlines are seeking alternative payment methods for their online customers — and not just in far-flung international markets. Both **Southwest Airlines** and **Northwest Airlines** recently announced that they are offering PayPal for online ticket purchases. And just last week, **JetBlue** announced that it is offering a 'Bill Me Later' option.

This growing trend signifies supplier savviness that's both money-smart and consumer friendly.

UATP Facilitates Cost-Cutting Move

A payment instrument like PayPal pays off for travel suppliers because its low fees promise something these companies (and airlines in particular) are always looking for: reduced distribution costs. Plus, airlines can take advantage of alternative payment methods right away because necessary tech is already at their fingertips.

The cost: "The average PayPal transaction fee could be half a percentage point lower than the average credit card fee," points out **Pawel Mastalerz**, principal with **NorthStar Capital Partners'** Travel Group.

Luckily, airlines have some technology groundwork already taken care of, thanks to **UATP** (Universal Air Travel Plan). Famous for launching the world's first credit card in 1936 and known today as a corporate travel payment network owned and issued by the airlines, UATP processes the PayPal transactions for Southwest Airlines and Northwest Airlines.

"PayPal connects to UATP, and we already have all the connections to our airline members, so 90 percent of the implementation is already done," **Ralph Kaiser**, CEO of UATP tells **TDR**.

How it works: A traveler purchases a ticket on Northwest's website, for example, selecting the PayPal option. "The payment processes in the airline's back office as a UATP transaction, and we pass it off to PayPal, and

they process it like a regular PayPal transaction," Kaiser explains.

Even better: In addition to lowering distribution costs, the airline saves money via UATP because it doesn't have to spend a lot of time and money implementing a new connection to PayPal, he adds.

Safer Payment Options Sit Well With Consumer Too

Consumers are fast responding to non-credit-card options, according to the airlines. But it's not just more choice that is keeping customers happy.

For example, PayPal has a "lower risk of fraud and charge backs," Mastalerz says, which can go a long way to easing the mind of online buyers.

In addition, non credit card options "may be important for the consumer with limited credit," whether she be a college student trying to build credit or a person trying to re-build their finances, says **Henry Harteveltdt**, VP and principal analyst for **Forrester Research**. Consumers "may have the money to travel, but they may not have the credit limit on a credit card or may not want to use all their credit for airline tickets."

Tricky: Don't be duped by the consumer's current high usage of credit cards and much lower usage of options like PayPal as an indicator to keep things as is. "Within the first few hours of our launch of PayPal, consumers were already taking advantage of it and were offering positive feedback that they loved having another option in addition to their credit card," Southwest Airlines spokesperson **Whitney Eichinger** tells **TDR**. (See the research spread on page 139 for more information about consumers' payment preferences.)

Beware Of Logistical — And Contractual Stumbling Blocks

Amidst the obvious perks of alternative payment methods like PayPal, you'll also want to play devil's advo-

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cate before you jump on board. For example, consider consumers' incentives to use a credit card. "Many consumers are holding credit cards which reward them for purchases with perks ranging from cash to airline miles," Mastalerz points out.

You'll also want to consider "the dispute resolution process" which is often easier to navigate with credit card companies than it is with PayPal, Mastalerz says.

Also, be aware that both Southwest and UATP revealed to **TDR** that technological "stumbling blocks" on both sides had to be ironed out to connect PayPal technology to the mainframe airline's system.

Don't miss: Carefully comb your contracts with credit card companies before promoting alternative payment options. "Many travel companies have co-branded credit cards," Harteveltdt notes. "Many of the credit card companies say [the merchant] cannot sell the customer away from using a credit card." On top of that, "some of the banks that issue credit cards may also be the banks that airlines and other travel companies turn to for their various financing," he says.

All things considered: Taking on alternative payment methods can be a solution to both "facilitate sales and also reduce the financial costs associated with [credit card] discount fees," says **Bob Mann**, airline analyst with **R.W. Mann & Co. Inc.** In that case, finding ways around the above stumbling blocks can be worth the investment.

"Just as the GNEs provide the airlines with economic leverage to use against the GDSs, alternative forms of payment that are more cost-effective give travel companies, along with other merchants, economic leverage against credit card companies," Harteveltdt says. ■

Credit card companies are keeping their eyes open, too.

Last December, **TDR** highlighted some of **Visa's** pilot projects for creating payment methods that could work as well, if not better, than credit cards (see Vol. 15, No. 2). For example, Visa offers cards linked not only to bank accounts, but also to pre-paid accounts and gift cards, **Stephanie Ericksen**, Visa's VP of product and technology integration told **TDR**. ■

Company In Focus

New European OTA Wields Web 2.0 To Win Over Travelers Of The Future

UGC can be an effective bandwagon to jump aboard, if you learn to steer it right, CEO says.

An Eastern European online travel agency (OTA) is combining bookings with the allure of Web 2.0 to cater to the younger traveler — and banking on the fact that doing it right will lead to primetime success in Web 3.0.

With an unlikely moniker, beta site **Bumrats.com** is focusing for the moment on just four cities — Budapest, Bratislava, Prague and Krakow — but its sights are set on Europe and beyond and, most importantly, on covering every aspect of the user-generated-content (UGC) and/or social networking landscape it can.

CEO **Ivan Tobias** reveals to **TDR** how the company, founded in 2005, plans to differentiate itself among the multitude of online travel players aiming to make a connection with web-interactivity-savvy consumers.

Strategy #1: Get Social, Every Way You Can

"Other websites tend to add only one facet of UGC," such as a travel blog or an opportunity to submit hotel reviews, Tobias notes. "We want to combine all of the UGC areas," he asserts.

Thus far, Bumrats features a blog, a forum and a personal picture and video gallery for all customers' use. These features combine with the site's air, hotel and activity booking capabilities. The company will soon add hotel and activity reviews, interactive maps and a social events feature that facilitates meetings with "pen friends" consumers have made online.

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Research & Trends

PayPal Usage May Be Relatively Low — But That Doesn't Mean Consumers Aren't Interested

Key market you don't want to miss: Travelers in younger generations.

If you've had your eye on **Northwest Airlines'** and **Southwest Airlines'** news of implementing PayPal, but you think your consumers are still perfectly happy with credit card payments, you may be in for a surprise.

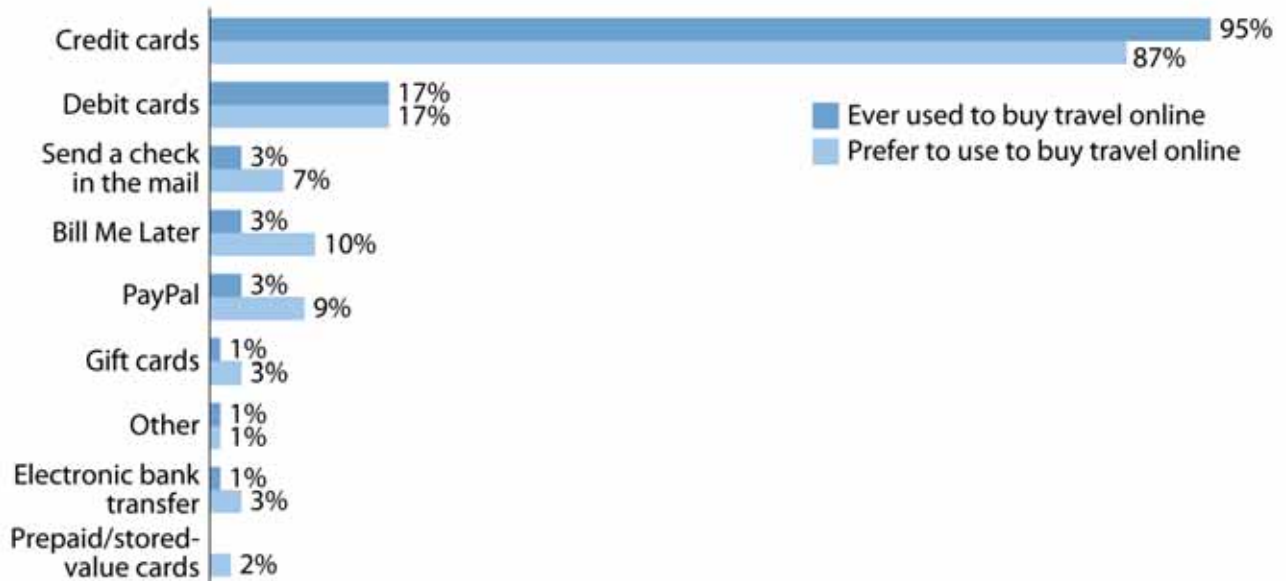
Granted, the percentage of consumers who use PayPal is much lower than that of those who use credit cards — but unlike credit cards, the percentage of consumers' *interest* in using PayPal is higher than the number of its actual users, according to a Feb. 2007 report by **Forrester Research** titled, "Travel Sellers Should Adopt Alternative Payment Options." The graph below, extracted from the report, illustrates that very point.

Reality: "Nothing is going to displace the credit card from its leadership position, but it's very clear that consumers are open to options, and if they are, the industry had better be responsive to their needs," says **Henry Harteveltdt**, Forrester Research VP and principal analyst.

And one group that is particularly responsive to PayPal is the Millenials generation, according to the report. "The Millennial and Generation X traveler are saying, 'if I can pay merchant X using PayPal, why can't I use it for all transactions — including travel?'" Harteveltdt tells **TDR**.

Perhaps that's the very question your company should be answering. ■

Figure 1 Travelers Have Unmet Demand For PayPal And Bill Me Later



Base: US leisure Bookers (multiple responses accepted)

Source: Forrester's North American Consumer Technology Adoption Study Q3 2006 Survey
 Note: Forrester included Western Union, Yahoo! Wallet, and Microsoft Passport in our survey but received an insufficient number of responses to include them here.

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Source: Forrester Research, Inc.

Company In Focus

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“By combining these areas we are offering a one-stop-shop for customers to have the same capacity as other websites, such as **Tripadvisor, Facebook and MySpace,**” Tobias says.

Strategy #2: Think Like A Twenty-Something

Bumrats wants to do more than simply emulate social networking sites’ capacities; the company also plans to get itself some exposure. “We will be setting up our pages on MySpace, Facebook and other UGC sites,” Tobias says.

The idea behind all the focus on Web 2.0 is to get in on the ground floor of a trend that will age and develop as the consumer does. “Although these [social networking] sites are mainly used by the under 24s and are therefore just below our target market, these people will be our next generation of customers and will grow with Web 2.0 into Web 3.0 users,” Tobias explains. “We will need to keep up with the trends as we see them emerging, rather than ‘jump on the band wagon’ after the event.” (See **TDR**’s blog, www.TravelBizBuzz.com for another example of catering to the next generation of travelers — through Facebook.)

Strategy #3: Control Your Social Inventory

While the popularity — and trustworthiness (in the eyes of consumers) — of UGC is growing, many companies are hesitant to ride this trend because of content management issues. For example, any bad reviews that are put on your website are immediately available to other potential consumers, notes Tobias. But the consequences of that aren’t all bad.

“By including [UGC on our site], we will be able to not only give our customers access to other travelers’ reviews, but we will also be able to see if our suppliers are maintaining good service standards,” Tobias details. Getting honest feedback from customers, he adds, will allow Bumrats to: immediately contact customers to remedy unfavorable situations, help suppliers offer a high standard of service and even remove suppliers from its contracted list “for failing to live up to their obligations or for falsely representing themselves.”

Plus, Bumrats will use the feedback to expand its site features accordingly, Tobias notes.

Bottom line: “The MySpace, i, or Web 2.0 generation, as it’s called, has been growing in popularity over the past several years,” Tobias notes — and the fledgling Bumrats site is out to garner as much as it can of the gains in website traffic UGC has drawn on other sites. ■

UGC Here To Stay — And Pay

“Seventy million U.S. Internet users will create some form of content online this year,” says **eMarketer** in a new report entitled “User-Generated Content: Will Web 2.0 Pay Its Way?” That’s 35 percent of the entire U.S. Internet population, which means you don’t want to be ignoring this skyrocketing trend. U.S. sites with user-generated content (UGC) will earn \$1 billion in ad revenues in 2007 and \$4.3 billion in 2011. Things look equally lucrative worldwide. Globally, UGC sites will earn \$1.6 billion in 2007 and \$8.2 billion in 2011. ■

News Spotlights

Online Travel

Travelocity Adds More Transparency To User Reviews

The consumer review wave has washed onto shore some very real stumbling blocks, such as ensuring authenticity. Many travel review sites, suppliers and online travel agencies have taken strides to prove the reviewer is an authentic guest. But **Travelocity** is taking this a step further and making sure the reviewer and the consumer are on the same wavelength. The company announced Aug. 7 a new hotel review tool that helps consumers find information from like-minded travelers.

How it works: Travelocity’s new hotel reviews include a screening process for all reviews based on travelers’ unique interests and needs, according to a press release. Travelers create customized profiles and then contribute detailed feedback on criteria important to them. For instance, travelers with disabilities provide comments on wheelchair accessibility, whereas pet lovers talk about pet friendly policies, Travelocity said.

The enhanced review tool stores content on 16 amenities and services — and also allows reviewers to leave

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helpful tips and advice for fellow travelers regarding local restaurants, events and activities.

Hotels

Luxury Market Keeps Travel Agency Channel Thriving

The hospitality industry has seen a healthy Q1 for electronic distribution, and travel agents in particular are reaping good results from the luxury segment. **TravelCLICK's** quarterly eMonitor results announced Aug. 6 that worldwide electronic hotel revenue from the GDS and "key Internet sites" increased 16.8 percent over Q1 of 2006.

A closer look: In Q1 of 2007, luxury hotel room nights reserved through travel agents increased 15 percent and surpassed \$360 per night in ADR, the report said. That's almost tripled, compared to the percent change in room nights for the upscale, mid-scale and economy segments.

"The ADR growth and room night increase are creating a more than \$100 per night 'wall' between the luxury and upscale market segments," observed **John Hach**, VP of eMarketing Products at TravelCLICK.

Strategy: "Highly targeted advertising strategies are vital to differentiate luxury properties that are vying for the large ADR opportunity within the travel agent channel," Hach added.

Luxury market aside, the travel agency bookings are faring well, at 81.2 percent of total room nights, the report said. The travel agent component of GDS bookings showed a 10.7-percent increase in ADR and a 15.8-percent increase in revenue compared to Q1 of 2006. The average rate for room nights booked through travel agents in Q1 of 2007 was 43.6 percent higher than that of those booked via the Internet for the same period last year.

But the Internet channel also performed well. Internet room nights (sourced from consumer online transactions on third-party websites powered by GDSs and the Online Distribution Database (ODD)), showed a gain of 10.7 percent compared to Q1 of 2006. ADR was up 11.4 percent for Internet bookings, and revenue was up 23.4 percent compared to the same period last year, according to the report.

Technology

ITA Scores Deal With Department Of Defense

Alternative distribution systems are continuing to come out of the woodwork this summer. The latest "GNE" news comes from **ITA Software**, which announced July

30 that the **U.S. Department of Defense** selected ITA's airfare pricing, shopping and availability management system, QPX, to help upgrade the Department's automated travel and travel management system, Defense Travel System (DTS) — namely in the areas of simplifying travel management and reducing travel cost.

How: To simplify the management process, the web-based DTS uses QPX to offer travelers real-time availability of flight schedules and fares. QPX provides capabilities such as airfare pricing and availability displayed on a single booking screen; consistently displayed itinerary results, irrespective of which GDS the traveler's commercial travel office uses; and configurable search criteria for -CA, YCA, MZ and other government negotiated fares, ITA explained.

As far as reducing travel cost, ITA's system gives DTS the ability to route an itinerary via a General Services Administration (GSA) city pair to ensure Department of Defense employees get the considerably discounted fares offered through the GSA City Pair Program.

When no GSA contract carrier is available, QPX capabilities can also help search for alternate destination airports with direct GSA flights — which can also result in considerable savings, ITA said.

In addition, QPX provides DTS the ability to find flights that support the Fly America Act, which requires active duty military, reserve and civilian employees to travel on U.S. flag air carriers.

Trends

Industry Turns Eye To Ticket Exchange Hassles

Travel industry players in both the leisure and corporate sectors are waking up to the inconvenience — and cost — of re-issuing tickets. **Amadeus** announced Aug. 1 the launch of Amadeus Ticket Changer, a solution available for U.S. travel agents that automates the calculations necessary to change or reissue an airline ticket. "Time is money for a travel agent, and changing and reissuing air tickets can greatly impact an agent's productivity," said **Bob Lowry**, SVP of products and support for Amadeus North America.

And that fact hits home, according to the **Airline Tariff Publishing Company** (ATPCO), which estimates that an average of 10 percent of tickets issued are changed.

Details: Amadeus Ticket Changer handles both public and private fares and all itineraries: domestic, international

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News Spotlights

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or a mixture of both, according to a press release. Agents can re-issue tickets for interline and alliance partners, and the Ticket Changer will even reissue e-tickets originally issued in other GDSs, Amadeus boasted.

Travelocity Business is also contributing to the ticket exchange game by showing corporations the big bucks they can save by exchanging tickets online, as opposed to calling an agent. The company announced July 23 a new report targeted at travel procurement executives called the online ticket exchange (OTE) Lost Savings report.

In a nutshell, Travelocity Business gives travel managers “CFO-ready reports” showing how much a company can save if its travelers make more ticket exchanges online.

The key: Educating travelers on the cost of changing a ticket can contribute to saving money. “When an exchange is initiated online, corporations also gain from the visual guilt factor — once the traveler sees how much it will cost in fare adjustment, they may think twice about switching that flight,” said **Lesley Harris**, president of Travelocity Business.

These announcements come on the heels of **American Express Business Travel**’s launch of Quick Exchange, powered by **Worldspan**’s Rapid Reprice technology. The solution automates AEBT’s U.S. reservation network ticket re-pricing, reissuing and refunding process, with the aim to eliminate manual re-ticketing and ultimately save clients money. (See *TDR*, Vol. 15, No. 14). ■

News Briefs

Expedia’s Q2 Rides On Non-North America Bookings

In its Q2 results announced August 2, **Expedia Inc.** noted an 8-percent increase in North America bookings — but Europe, **Expedia Corporate Travel** and Asia-Pacific operations took the cake with a whopping 38-percent increase in bookings. Gross bookings increased 14 percent, compared to Q2 of 2006, according to a press release. Revenue increased 15 percent, primarily driven by increased worldwide merchant hotel revenue and advertising and media revenue, but partially offset by a decline in North America air revenue. North America revenue increased 11 percent, Europe revenue increased 30 percent, and other revenue increased 28 percent, the company said. Gross profit rang in at \$546 million — a 16-percent increase, compared to Q2 of 2006. Adjusted net income decreased \$4 million, and net income increased less than \$1 million.

Cheapflights Tests Hotel Waters

Cheapflights.com announced July 31 two new website features. Based on focus group feedback, a 60-day beta test period and partner input, Cheapflights.com launched both a hotel booking tool and flight search-by-date tool. “Our research shows that consumers search an average of five or six travel sites to find the best deal,” said **Michael Bennett**, U.S. general manager for Cheapflights.com. “We help travelers to comparison shop for flights and hotels all in one place, saving them the time

and hassle of clicking from site to site.” Hotel and airfare partners include **Priceline, Hotwire, Travelocity, Expedia, Orbitz** and others. Visitors will also find hand-picked deals selected by Cheapflights’ in-house Deal Finder, plus exclusive deals not found anywhere else, the company promised.

Enterprise, Vanguard Seal The Deal

The owners of **Enterprise Rent-A-Car** announced Aug. 1 that they have completed the purchase of **Vanguard Car Rental** and its **National Car Rental** and **Alamo Rent A Car** businesses from **Cerberus Capital Management LP**. The Taylor family, who owns and operates Enterprise, announced it will operate Vanguard and its National Car Rental and Alamo Rent A Car businesses as an independent subsidiary separate from Enterprise “for the foreseeable future.” Joint teams from both Enterprise and Vanguard have, however, already begun an integration review process, according to a press release. “Already on ‘Day 1’ we are implementing programs that allow each company’s corporate customers to participate in programs offered by its new sister company; for example, offering free memberships in National’s Emerald Club for Enterprise corporate customers,” said **Andrew C. Taylor**, Enterprise chairman and CEO. The totals for the two businesses include: \$11.7 billion in annual revenue; 10,683 locations; 1.1 million vehicles; and 74,169 employees.

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News Briefs

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EzRez Snatches \$15 Million

EzRez Software Inc., an online travel solutions provider that helps businesses package and sell travel products, announced Aug. 2 that it has secured \$15 million in a second round of financing. **Canaan Partners** led the round of funding with **Azure Capital Partners** and existing investors also participating, according to a press release. EzRez said it will use the funds to “drive product development and international growth to meet the increasing demand for robust, online travel systems that can be branded and customized for business.”

Pegasus Enters The Blog World

Pegasus Solutions Inc. announced July 27 it has launched its new industry blog, “Pegged.” *The concept:* It’s an open forum where Pegasus’ hospitality and technology experts will share their thoughts about hot industry topics, events or news, according to a press release. “It is our hope this will become a place for leaders across the industry to come and participate in discussion,” said **Chip Rosales**, Pegasus VP of corporate marketing and communications. ■

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RENEW NOW -- SAVE \$95.00!

Printed: August 2007

REMITTANCE STUB

Please detach and remit with payment.

Travel Distribution Report

Customer #:

Bill To:

Name _____
Address _____
City _____ State ____ Zip _____
Phone _____
Fax _____
Email _____

PLEASE CHOOSE PAYMENT OPTION:

Check enclosed *(Payable to New Hill Services)*
 Visa MC AMEX Disc
Name on card _____
Card # _____
Expiration Date _____
Signature _____
Email _____
Phone _____
Fax _____

Discount Code: I87RAA01

Amount Total: \$402.00