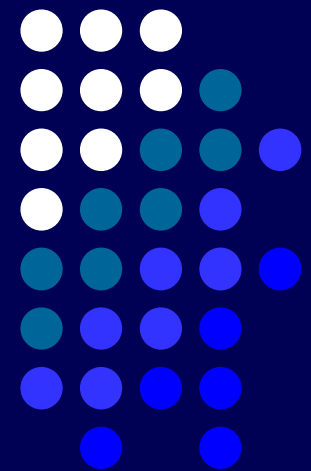
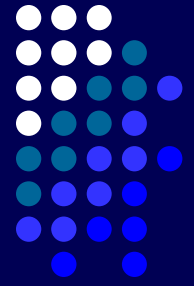


**Maximizing Trade
with the
United States
Manama, Bahrain
May 6-7. 2009**

**Identifying U.S. Suppliers in the
Hospitality Industry & Marketing
Your Services to the American
Tourist**

Susan Sarfati, CEO
Beyond Excellent!
1455 Pennsylvania Ave.
Suite 400
Washington, DC 20004
001 + 1 202.365.3440

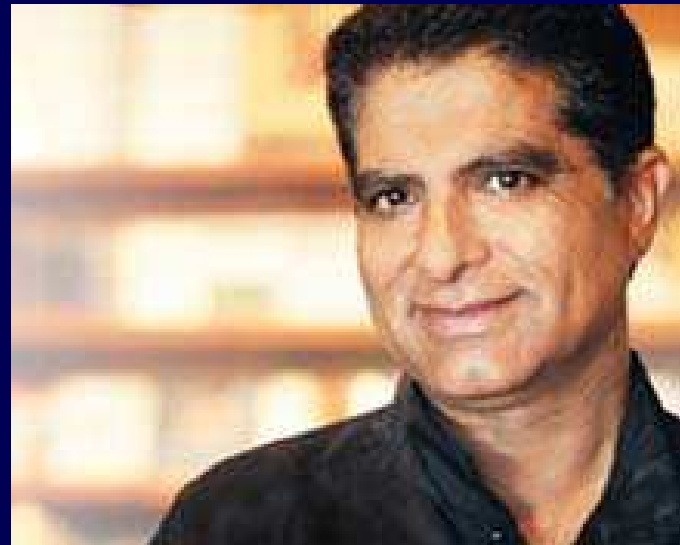




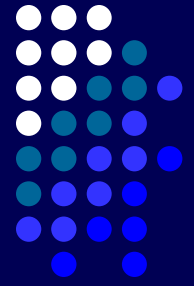
“We are essentially infinite choice-makers.

In every moment of our existence, we are in that field of all possibilities where we have access to an infinity of choices.”

Deepak Chopra



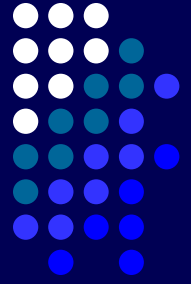
What do you want to be known for?



- Boutique destination in the Gulf
- Showcasing unique history, culture and heritage
- Focusing on family and business tourism
- Hosting major events
- Other

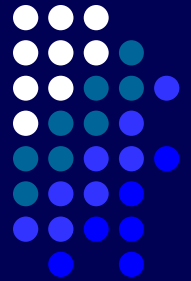


What is critical for tourism & growth?



- Need to differentiate among locations in the region
- Superior airlift and hotel choices
- Hassle free airport
- High service standards
- Safe location (terrorism, health issues, water quality)
- Other

Tourism Considerations



- Consumer Expectations (How do consumers see their prospects?)
- Real personal disposable income (Do consumers have means to travel?)
- Real personal consumption expenditures (Are consumers willing to spend their income?)
- Net consumer installment loans growth (Do consumers have access to credit?)
- S&P 500 (What are the prospects for business profits in the near term? How have potential travelers' balance sheets been affected?)
- Manufacturer's new orders (Are businesses investing? Are businesses expecting growth in the near term?)
- Relative prices (Is travel becoming more or less expensive?)

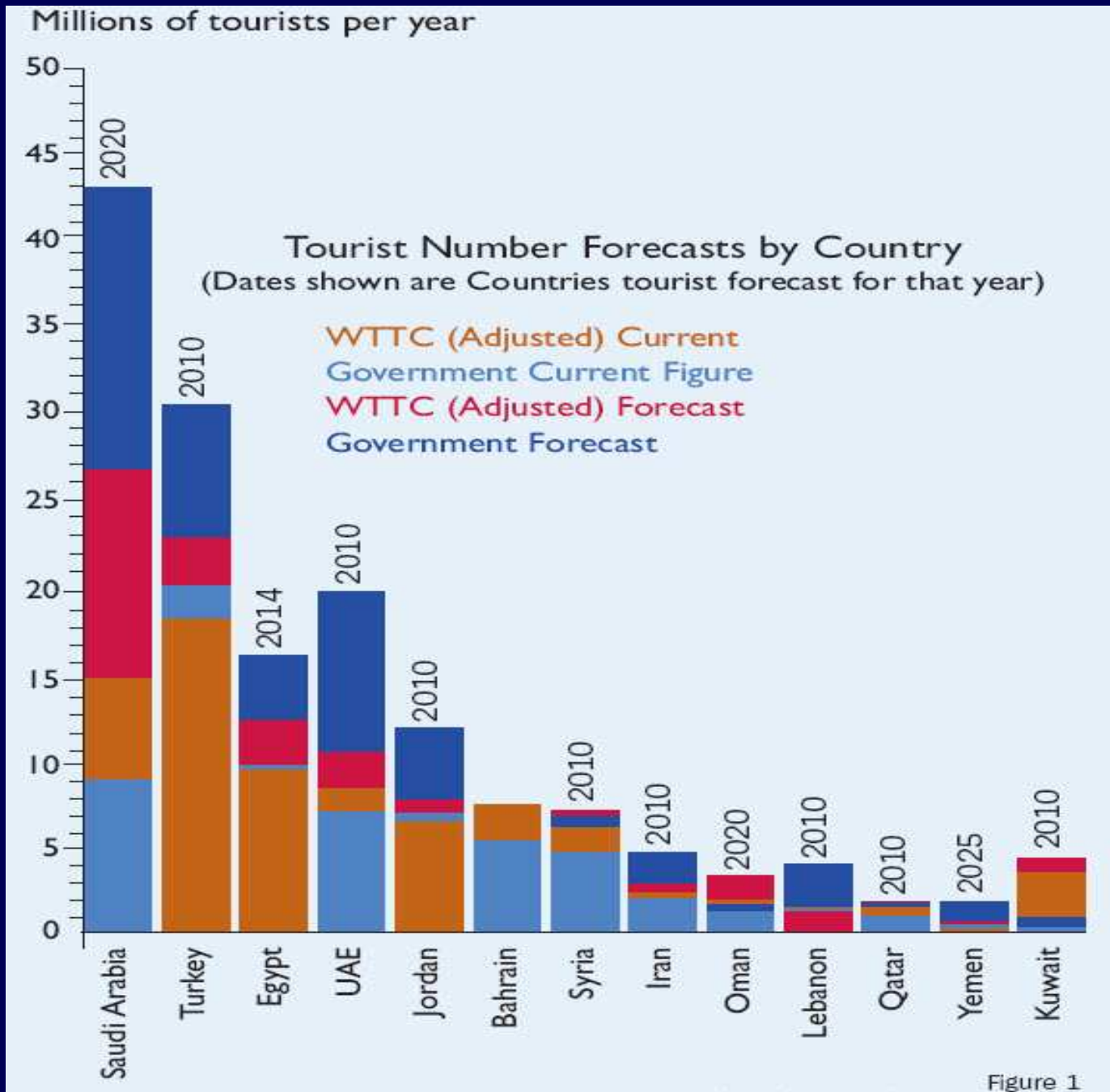
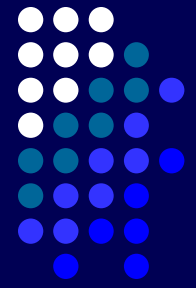


Figure 1

Source: The Future of Travel and Tourism in the Middle East- A Vision to 2020, Global Futures and Foresight

A Vision to 2020

Global POPULATION
TO REACH 8Bn

NUMBER OF TOURISTS EXPECTED TO REACH 150 MILLION BY 2020

By 2027 Middle East Airlines will buy **870** aircraft.

Dubai International Airport projected to be handling up to **100M passengers** per year by 2025

OMAN TARGETS OMANISATION RATE (NO. OF LOCALS EMPLOYED) OF 50% BY 2020 IN TOURISM SECTOR

AIRCRAFT 50% MORE FUEL EFFICIENT



Hypersonic Travel by 2020



By 2050 humans will need at least two planets' worth of natural resources to live as they do now.

Dubai forecast to double number of tourists by 2022

PHOTO BY GETTY IMAGES/ISTOCKPHOTO.COM recycle

GLOBAL TOURIST ARRIVALS TO REACH OVER 1.56BN BY 2020.

Saudi targets **2M** non-Haj and Umrah visitors by 2020

100M CHINESE OUTBOUND TOURISTS

World tourism market could TRIPLE



ROBOTIC HOTEL STAFF WILL BE COMMON

ME PASSENGER FLEET COULD RISE TO 1195 AIRCRAFT BY 2025.

MULTILINGUAL, CONVERSATIONAL INTERFACES COULD REPLACE KEYBOARDS.

IRAN TARGETS 25M VISITORS

WATER AVAILABILITY IN MIDDLE EAST AND NORTH AFRICA TO DROP BY HALF BY 2050.

FLOODING RESULTING FROM CLIMATE CHANGE COULD DISPLACE 200M.

Oman's 2M tourist capacity **\$15Bn** Blue City development to be completed by 2026.

2020



Downloaded from www.thetalent.com

Reed Travel Exhibitions



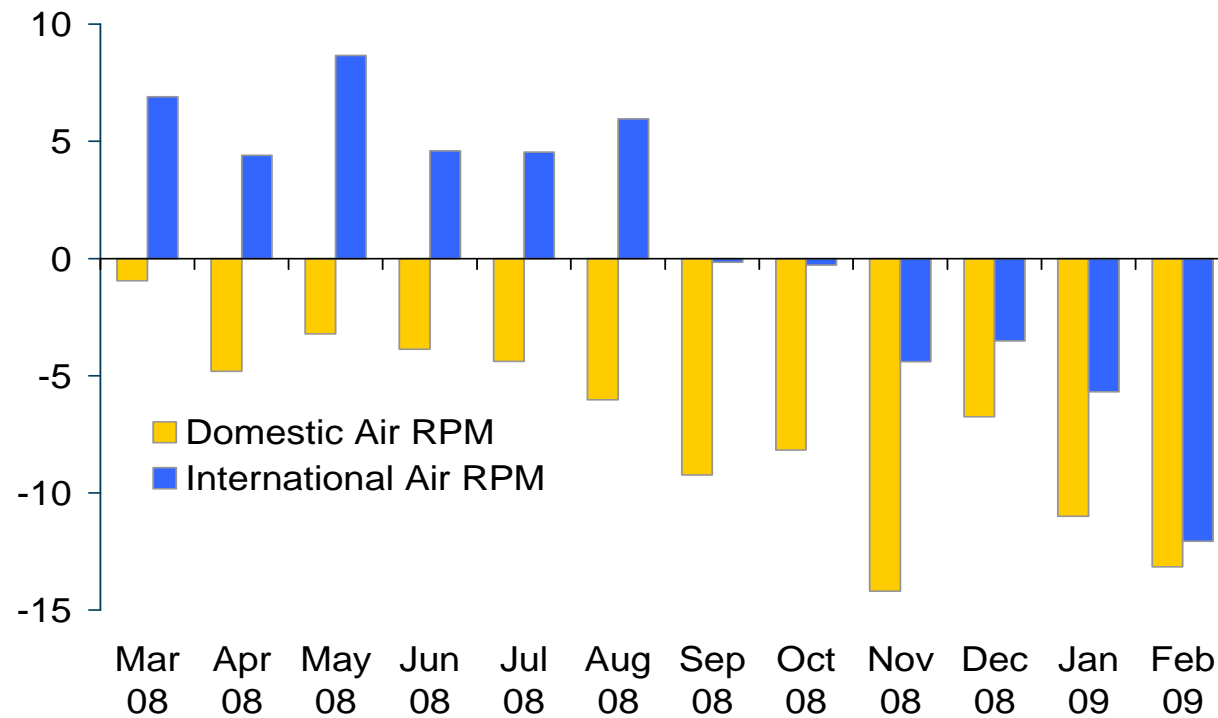
Global Futures and Foresight

No safe haven for aviation sector



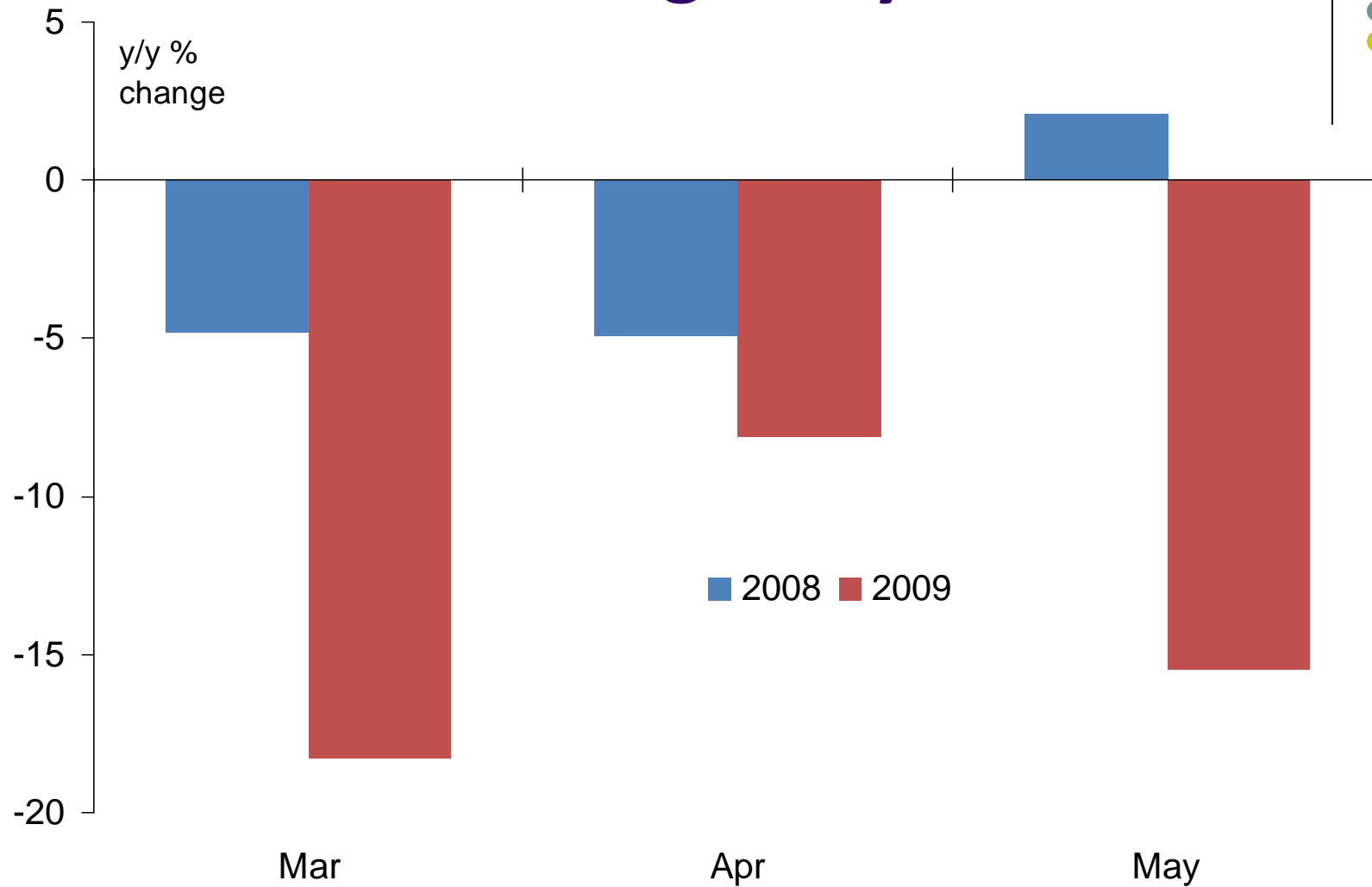
Air Passenger Miles

yoy % change



Source : ATA

Forward air bookings very weak

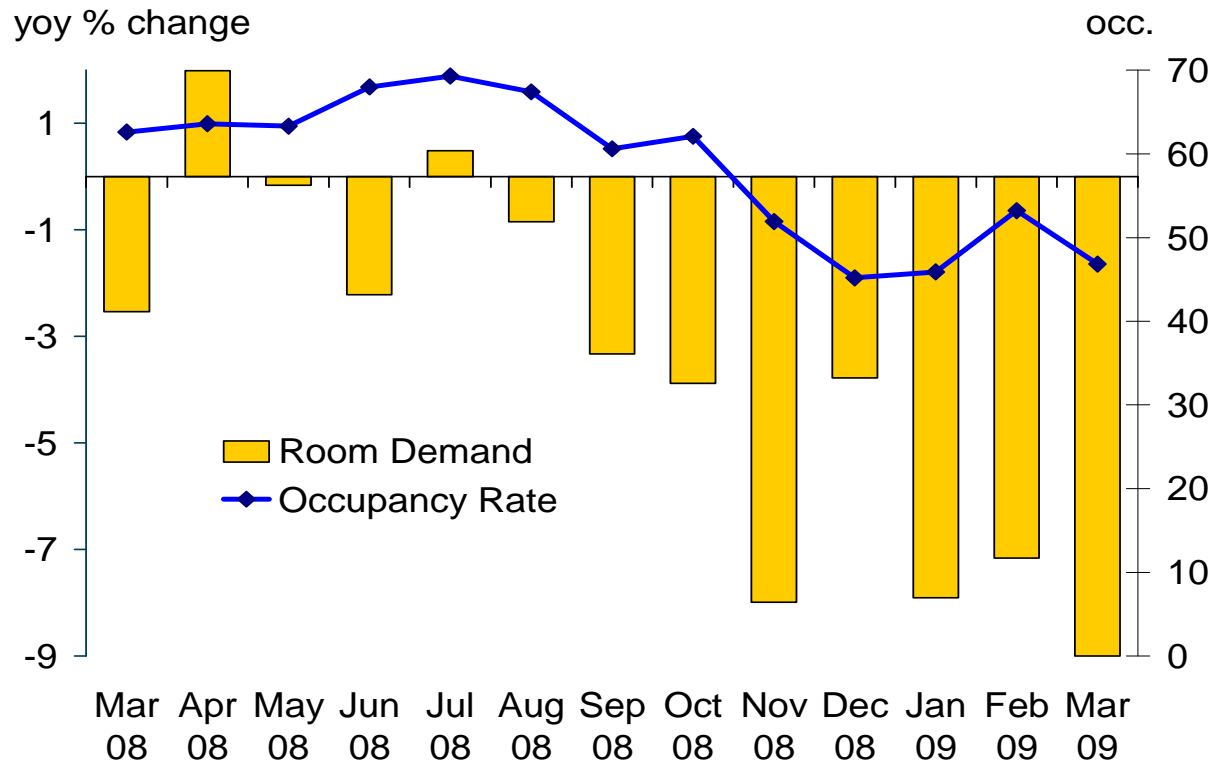


Source: Airlines Reporting Corporation

Hotel demand rivals aviation



Lodging Demand

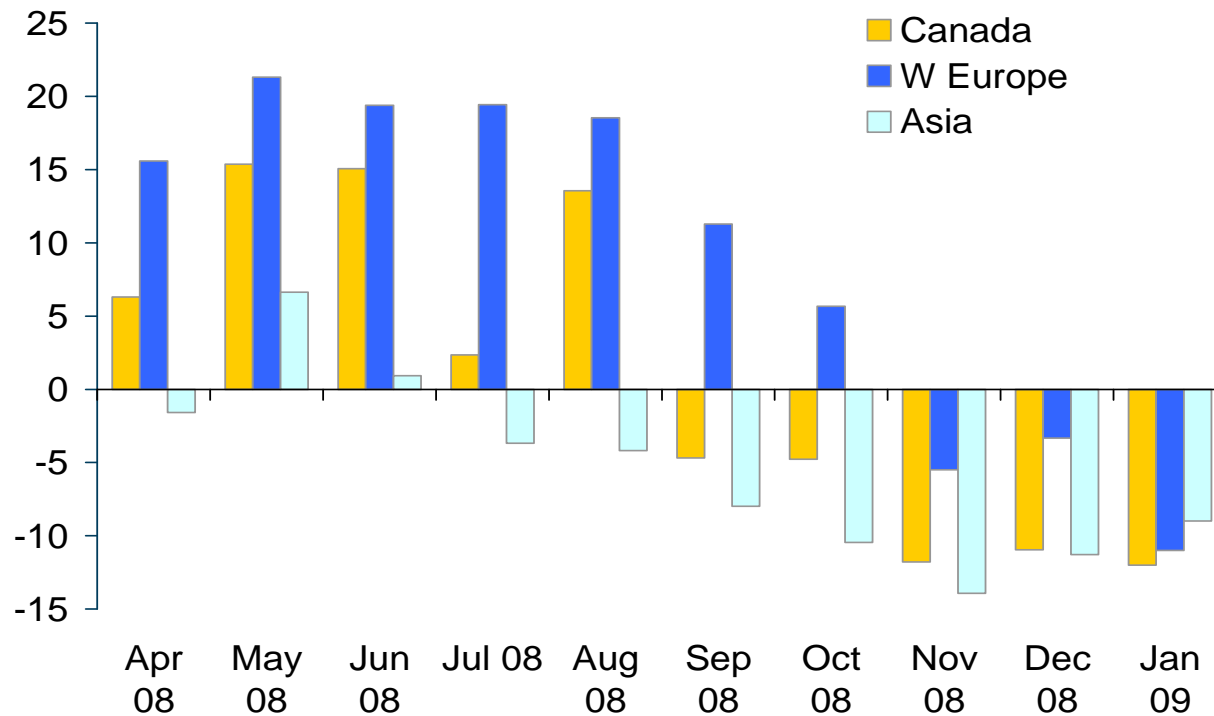


Source : Smith Travel Research

2009 poised for international declines



US Inbound
yoy % change

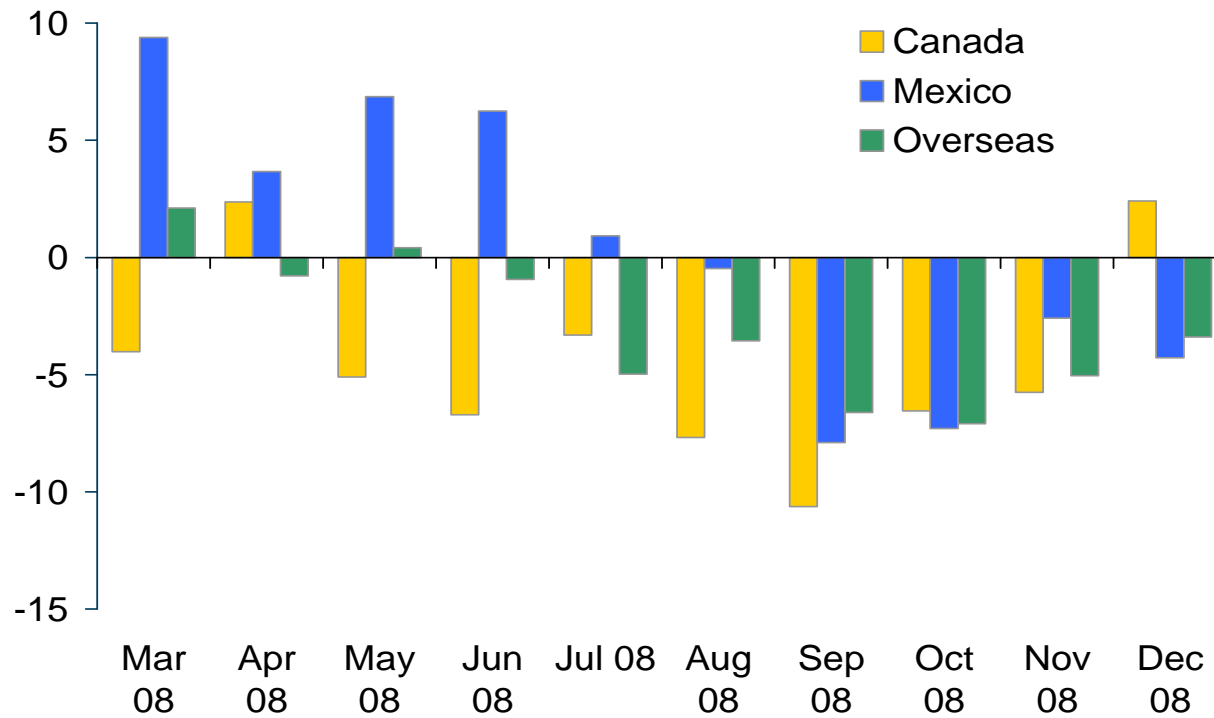


Source : US Department of Commerce, OTTI

Weak outbound



US Outbound yoy % change



Source : US Department of Commerce, OTTI

Strategic Map for Destination Marketing

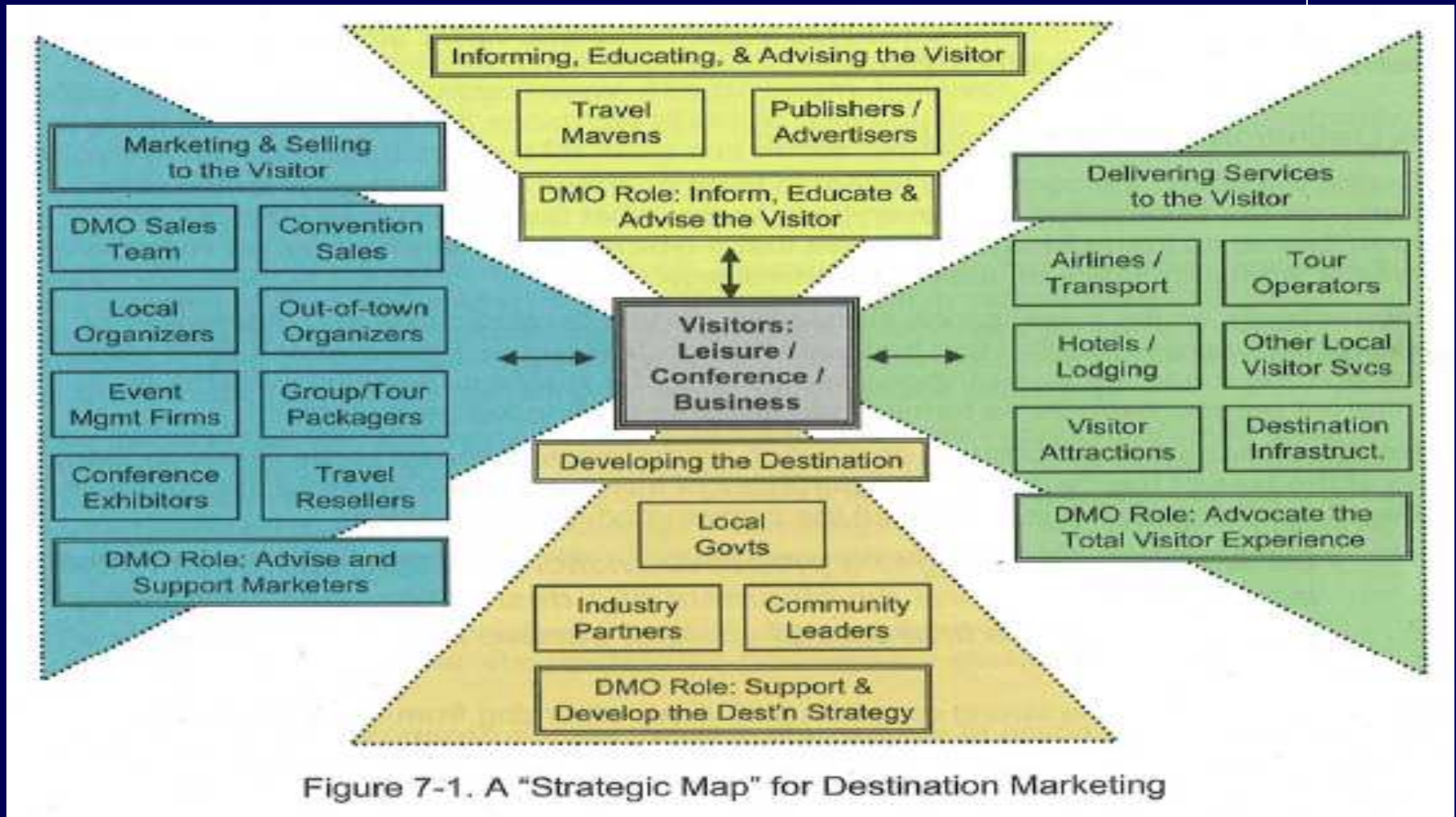
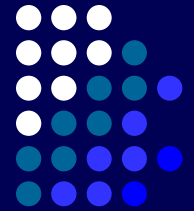
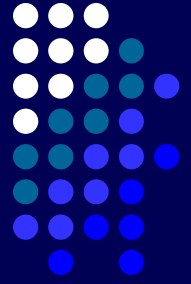


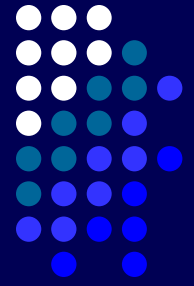
Figure 7-1. A "Strategic Map" for Destination Marketing

Source: "The Future of Destination Marketing" 2008 Futures Study Report Conducted for Destination Marketing Association International (DMAI) Foundation

Trends Perceived by Destination Marketing Organizations

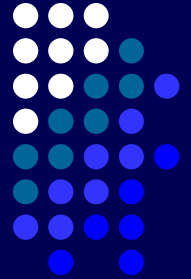


1. Web site design and implementation will be increasingly critical particularly in the leisure travel segment.
2. Massive shift of content to the Internet continues as an accelerating pace.
3. Consumers are increasingly comfortable with ordering products online.
4. Travel customers are becoming increasingly more segmented in their interests.
5. People increasingly expect to be treated as individuals and to “know who I am.”



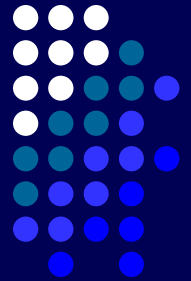
6. There is ever more information clutter, more “noise.”
7. Web-based distribution of information predisposes people to want results immediately.
8. Baby boomers have more disposable income under normal conditions to allocate to travel/leisure.
9. Travel customers increasingly seek greater value for their money.
10. Travel customers are increasingly more fickle and self-reliant.

Identifying Related U.S. Associations



- Association of Tour Operators
- U.S. Tour Operators Association
- National Tour Association
- Society of Incentive Travel Agents (SITE)
- American Society of Travel Agents

United States Tour Operators Association (USTOA)

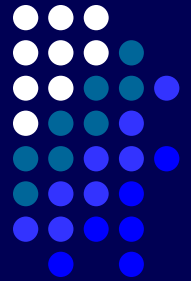


- A professional association representing the tour operator industry
- Composed of companies whose tours and packages encompass the entire globe and who conduct business in the U.S.
- Members number among the top names in travel and represent the entire spectrum of vacation packages and tours
- Member companies are responsible for the majority of tours and vacation packages sold by travel agents in the U.S.
- According to a recent survey, USTOA companies move more than 11 million passengers annually and account for an annual sales volume of more than \$9 billion USD

Source: www.ustoa.com

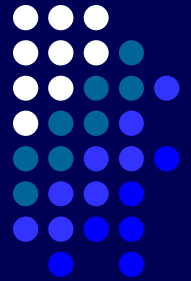


The National Tour Association



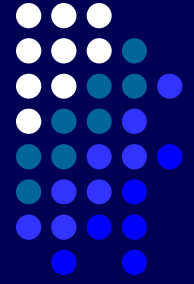
- A trade organization of thousands of tourism professionals involved in the growth and development of the packaged travel industry
- Organization is committed to providing business opportunities and professional education in an environment where members can foster relationships with one another

Society of Incentive Travel Executives (SITE)



- Has more than 2,200 members in 97 countries with 36 local and regional chapters.
- It is the only global authority connecting motivational experiences with business results

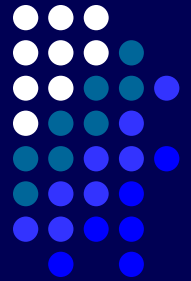
Source: <http://www.siteglobal.com>



SITE Members Include:

- corporate executives
- corporate planners
- incentive companies
- destination management companies
- travel and event meeting planners
- transportation companies
- hotels and resorts
- cruise lines
- trade publications
- supporting organizations such as restaurants and visitors attractions

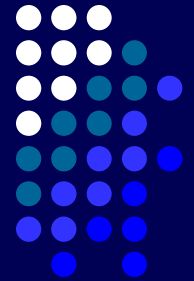
American Society of Travel Agents



- World's largest association of travel professionals whose members include travel agents and the companies whose products they sell such as tours, cruises, hotels, car rentals, etc.
- The leading advocate for travel agents, the travel industry and the traveling public.

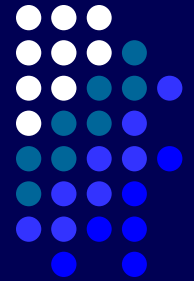
Source: <http://www.asta.org/>

Convention Industry Council (CIC)



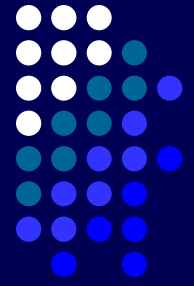
- Members represent more than 103,500 individuals and 19,500 firms and properties involved in the meetings, conventions and exhibitions industry
- Offers many tools and programs designed to support the industry and meet its challenges
- Facilitates the exchange of information and ideas
- Educates the public on the industry's profound economic impact

CIC fulfills its mission with...



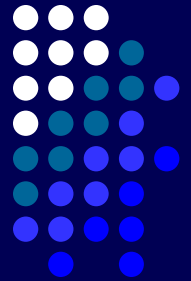
- The Certified Meeting Professional (CMP) industry certification program
- Piloted the Accepted Practices Exchange (APEX) initiative to develop accepted practices for the industry
- Recognizing pioneers of the industry through the Hall of Leaders program
- Publishing industry reference materials

CIC Member Organizations



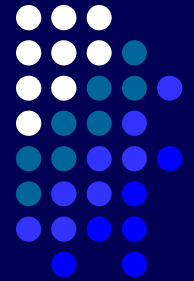
- Association of Collegiate Conference and Events Directors-International (ACCED-I)
- AMC Institute - *Formerly IAAMC*
- Alliance of Meeting Management Consultants (AMMC)
- American Hotel & Lodging Association (AH&LA)
- American Society of Association Executives and the Center (ASAE & The Center)
- Association for Convention Operations Management (ACOM)
- Association of Destination Management Executives (ADME)
- Council of Engineering and Scientific Society Executives (CESSE)
- Center for Exhibition Industry Research (CEIR)
- Destination Marketing Association International (DMAI) - *Formerly IACVB*
- Exhibit Designers and Producers Association (EDPA)
- Exhibition Services & Contractors Association (ESCA)
- Financial and Insurance Conference Planners (FICP) - *Formerly ICPA*

CIC Member Organizations



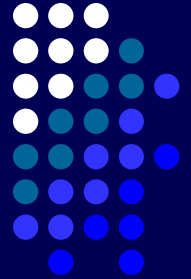
- Green Meetings Industry Council (GMIC)
- Healthcare Convention and Exhibitors Association (HCEA)
- Hospitality Sales and Marketing Association International (HSMIAI)
- International Association of Assembly Managers (IAAM)
- International Association of Conference Centers (IACC)
- International Association for Exhibitions and Events (IAEE) - *Formerly IAEM*
- International Association of Professional Congress Organisers (IAPCO)
- International Association of Speakers Bureaus (IASB)
- International Congress and Convention Association (ICCA)
- International Special Events Society (ISES)

CIC Member Organizations



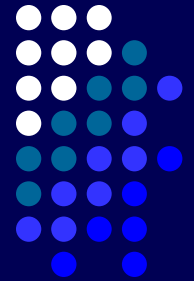
- Meeting Professionals International (MPI)
- National Association of Catering Executives (NACE)
- National Business Travel Association (NBTA)
- National Coalition of Black Meeting Planners (NCBMP)
- National Speakers Association (NSA)
- Professional Convention Management Association (PCMA)
- Religious Conference Management Association (RCMA)
- Society of Government Meeting Professionals (SGMP)
- Society of Incentive & Travel Executives (SITE)
- Trade Show Exhibitors Association (TSEA)
- U.S. Travel Association (U.S. Travel)

Trade Shows of Importance



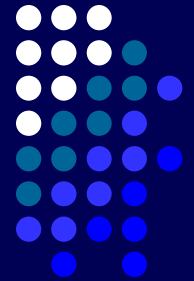
- IMEX
- EIBTM
- Reed Travel Exhibitions

IMEX



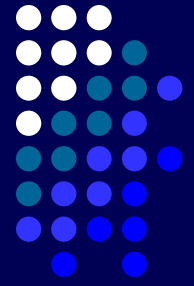
- Essential worldwide exhibition for meetings and incentive travel held annually in Frankfurt
- In 2008 3,500 exhibitors attended from 150 countries representing national and regional tourist offices, major hotel groups, airlines, destination management companies, service providers, trade associations and more.
- Over 3,600 hosted buyers from 58 world markets visited IMEX 2008, contributing to a total of 8,700 visitors for the show's busiest three days ever.

EIBTM 2008

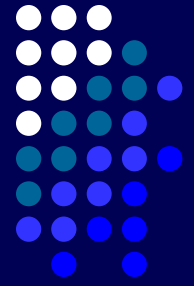


- Held annually in Barcelona
- Achieved a total attendance of 8,131 establishing the event as the largest gathering of the global meetings industry that is independently audited
- 8,131 marks 8% increase in attendance from 2007:
 - 7,838 Visitors and Hosted Buyers
 - 293 VIPs, students and press

Reed Travel Exhibitions organize 14 events worldwide including:



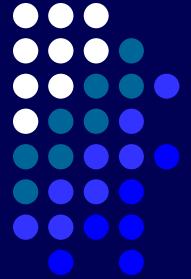
- World Travel Market
- Arabian Travel Market
- European Incentive
- Business Travel & Meetings Exhibition (EIBTM)
- Americas Incentive
- Business Travel & Meetings Exhibition (AIBTM)
- Asia Pacific Incentives & Meetings Expo (AIME)
- International Golf Travel Market
- Top Resa
- ICCA Exhibition, in association with the ICCA Congress
- International Luxury Travel Market (ILTM)
- La Cumbre
- City Break
- China Incentive
- Business Travel & Meetings (GIBTM)
- Asia Luxury Travel Market (ALTM)



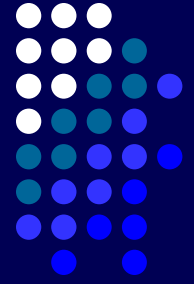
Popular Travel Media

- Conde Nest Traveler
- Travel & Leisure
- Time Out Web site (timeout.com)
- National Geographic Adventure and other niche magazines
- Outside
- Travel Guides

Popular U.S. Travel Websites

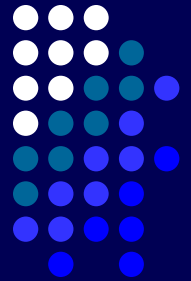


- Orbitz, www.orbitz.com
- Travelocity, www.travelocity.com
- Luxury Link, <http://www.luxurylink.com/>
- Hotels.com, www.hotels.com
- Expedia, www.expedia.com
- Trip Advisor, www.tripadvisor.com
- Cheap Tickets, www.cheaptickets.com
- Priceline, www.priceline.com
- Lonely Planet, www.lonelyplanet.com



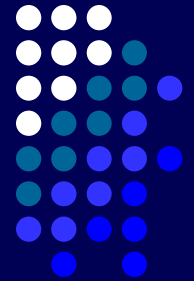
When will recovery come?

Factors influencing when recession will end?



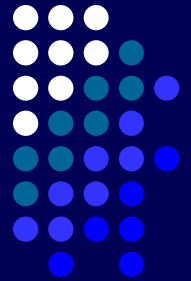
- Government policy and bank recapitalisations
- Consumer spending and the rise in savings
- An end to fear within the corporate sector.

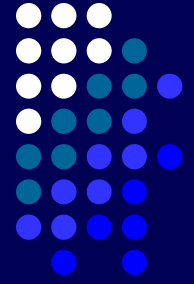
Goals of the US Travel Tracker



- Provide a one-stop resource for the latest available
 - Travel trends
 - Industry performance
 - Economic indicators
 - Forward looking metrics
 - Analysis
- Provide monthly reports on the US and global economies
- Provide regular webcasts with industry experts and economists

What are Bahrain's Top Priorities Going Forward?





Thank You!!