



*Nielsen  
Monitor-Plus Spotlight:*

**Hospitality  
and Travel  
Advertising**

June 2009

**nielsen**  
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## The Nielsen Company takes a close look at advertising for the Travel and Hospitality industry.

### Advertising by Medium

In 2008, the Travel & Hospitality industry (travel, hotel, and resorts) spent \$3.89 billion in advertising, a gain of 4% over 2007. The majority of advertising was spent on National Magazines (\$808 million), followed by Spot TV (\$626 million) and Cable TV (\$461 million).

Media Type	Jan - Dec 2008 (\$ mil)	% of total hospitality spending
National Magazine	\$808.2	21%
Spot TV 210 DMAs	\$626.2	16%
Cable TV	\$461.0	12%
Internet*	\$412.5	11%
Network TV	\$400.2	10%
Local Newspaper	\$369.1	9%
Outdoor	\$368.1	9%
Spot Radio	\$184.0	5%
National Newspaper	\$112.2	3%
Local Magazine	\$52.9	1%
National Sunday Supplement	\$35.8	1%
Network Radio	\$29.4	1%
Spanish Language Network TV	\$18.2	0.5%
Syndicated TV	\$7.5	0.2%
Local Sunday Supplement	\$6.7	0.2%
Spanish Language Cable TV	\$3.0	0.1%
<b>Grand Total</b>	<b>\$3,894.9</b>	<b>100%</b>

Source: The Nielsen Company  
\*Internet data provided by Nielsen AdRelevance, image-based online advertising only

### Top Advertisers

Spending for the top 10 advertisers for 2008 totaled \$998.5 million, essentially flat compared to 2007. Southwest Airlines was the largest advertiser, spending \$191.6 million.

Intercontinental Hotels showed the largest growth, increasing its ad budget 29%, and advertising heavily for Holiday Inn Express (\$35 million, 44% gain), and Holiday Inn Hotels (\$24.8 million, 65% gain).

Carnival Corporation considerably reduced spending for its Princess Cruises, contributing to the company's 21% decline in advertising expenditures.

Travelport Corporate Solutions was the top online advertiser, followed by VactionsToGo.com and Walt Disney.

Top 10 Hospitality Advertisers	Jan-Dec 2008 (\$ mil)	% Change vs. 2007
Southwest Airlines Co.	\$191.6	20%
Blackstone Group LP	\$186.4	17%
Expedia Inc.	\$107.9	-12%
Carnival Corp.	\$89.3	-21%
Intercontinental Hotels Group PLC	\$80.3	29%
Hamlet Holdings Inc.	\$79.7	-16%
Royal Caribbean Cruises Ltd.	\$70.5	-14%
Sovereign Holdings Inc.	\$69.8	1%
Marriott Intl Inc.	\$64.0	-15%
Choice Hotels Int'l Inc.	\$59.0	-2%
<b>Total Top 10</b>	<b>\$998.5</b>	<b>0.1%</b>

Source: The Nielsen Company  
Note: Data excludes Internet spending

# Travel and Hospitality Advertising

## Top 10 Online Advertisers in Travel Industry for 2008

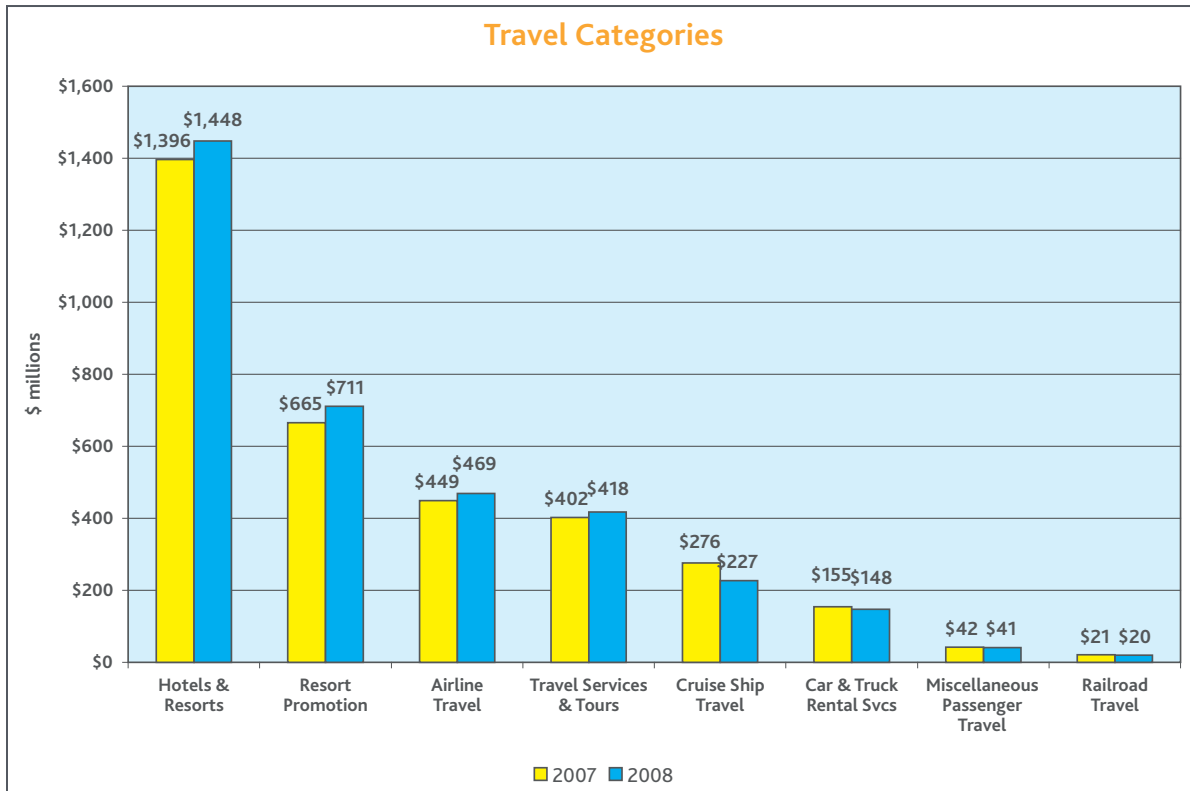
Rank	Company
1	Travelport Corporate Solutions, Inc.
2	VacationsToGo.com
3	The Walt Disney Corporation
4	Best Western International, Inc.
5	Hilton Hotels Corporation
6	Cendant Corporation
7	Starwood Hotels & Resorts Worldwide, Inc.
8	Southwest Airlines Co.
9	General Electric Company
10	Extended Stay America, Inc.

Source: Nielsen AdRelevance service uses a proprietary methodology for estimating online advertising expenditures and only takes into account image-based technologies and advertising sold per CPM. Above data does not reflect house advertising activity, compound image/text ads, strategic partnerships between publishers and advertisers, or text units, paid search, sponsorships, email, units contained within applications (e.g., messengers and pre-rolls) or performance based advertising.

## Top Product Categories

The graph below depicts spending for the travel categories for 2008 vs. 2007.

Hotels & Resorts had the highest spending (\$1.4 billion). Half the categories showed increases in spending: Resort Promotion (7%), Hotels & Resorts (4%), Airline Travel (4%), Travel Services and Tours (4%). Cruise Ship Travel decreased spending 18%.



## Nielsen Monitor-Plus Spotlight:

# Travel and Hospitality Advertising

### Product Placement

Nielsen's Product Placement service reports that the top 10 travel and hospitality brands on broadcast television had a total of 1,564 placements in 2008 for primetime entertainment programs, 34% greater than in 2007. The Paris Las Vegas Hotel and Casino placed first (474 occurrences), followed by the MGM Grand Hotel & Casino (271), and New York New York Hotel & Casino (197). Most of the top 10 brands are hotels, with the exception of these three: JFK International Airport, Crow Creek Goldmine Tourist Attraction, and Los Angeles International Airport.

The top 10 broadcast network television programs that featured hospitality placements accounted for 2188 occurrences in 2008 (see chart, top right). So You Think You Can Dance was the top program with 534 placements. The backdrop of the program's stage is an image of the Las Vegas strip, featuring signage for the following hotels in the foreground: MGM Grand Hotel & Casino, New York New York Hotel & Casino, and Monte Carlo Resort & Casino Hotel.

Last Comic Standing was the second-ranked broadcast TV program, and its top brand was another sin city hotel, the Paris Las Vegas Hotel & Casino (395 occurrences).

Enterprise-Rent-A-Car was the brand with the most occurrences on CSI: Crime Scene Investigation.

For the cable networks monitored (A&E, BRVO, HGTV, MTV, TLC), there were 3,306 placements on the Top 10 programs during primetime entertainment programs in 2008, 39% less than in 2007 (5428 placements). Jon and Kate Plus 8 had the most occurrences with 81 placements.

The top 10 brands on Cable TV (A&E, BRVO, HGTV, MTV, TLC) accounted for 1,233 placements on primetime entertainment programs in 2008. Luxor Hotel & Casino was the top brand, with 201 placements. Four of the brands were Hotel & Casinos: Luxor, Planet Hollywood, Palms Resort Casino, and MGM Grand.

Hospitality Product Placement Activity: Top Programs on Broadcast Network Television 2008		
Program	Network	Total Occurrences
So You Think You Can Dance	FOX	534
Last Comic Standing	NBC	445
CSI: Crime Scene Investigation	CBS	349
Amazing Race	CBS	289
Extreme Makeover: Home Edition	ABC	159
America's Got Talent	NBC	103
America's Toughest Jobs	NBC	94
Gossip Girl	CW	88
Law & Order: Special Victims Unit	NBC	70
Las Vegas	NBC	57
<b>Total</b>		<b>2,188</b>

Source: PlaceViews, Nielsen Product Placement Service; Jan 1 - Dec 31, 2008; Primetime Entertainment Programs (ABC, CBS, CW, FOX, MNT, NBC)

Hospitality Product Placement Activity: Top Programs on National Cable Television 2008		
Program	Network	Total Occurrences
Jon & Kate Plus 8	TLC	625
House Hunters	HGTV	410
Hills	MTV	346
House Hunters International	HGTV	325
Criss Angel Mindfreak	A&E	299
Paris Hilton's My New BFF	MTV	274
Gene Simmons Family Jewels	A&E	273
Little People, Big World	TLC	254
Real World	MTV	253
Making The Band 4	MTV	247
<b>Total</b>		<b>3,306</b>

Source: PlaceViews, Nielsen Product Placement Service; Jan 1 - Dec 31, 2008; Primetime Entertainment Programs (A&E, BRVO, HGTV, MTV, TLC)

Please contact your Nielsen representative today for advertising information on any product category that interests you.