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# POWER-UP

EDUCATION & NETWORKING EVENT

**BANGKOK**  
18 SEP 2025

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FOR COMMERCIAL HOTELIERS



**HEDNA**



# HEDNA Reviews 'The State Of Distribution'



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**BANGKOK**

**POWER-UP**

EDUCATION & NETWORKING

For Commercial Hoteliers

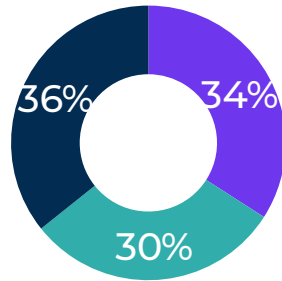


**THE STATE OF  
DISTRIBUTION  
2025**

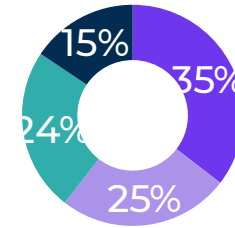
Collaboration to Create  
a Benchmark for Hotels

# Demographics: 700+ Brands from 310+ Cities Representing 21,000+ Properties

- This edition goes beyond the boundaries of distribution to explore the priorities, challenges,
- and technology needs across various functions of commercial teams



- Independent Hotels
- Mid-sized Hotel Chains
- Large Hotel Chains



- Marketing
- Sales
- Distribution
- Revenue Management

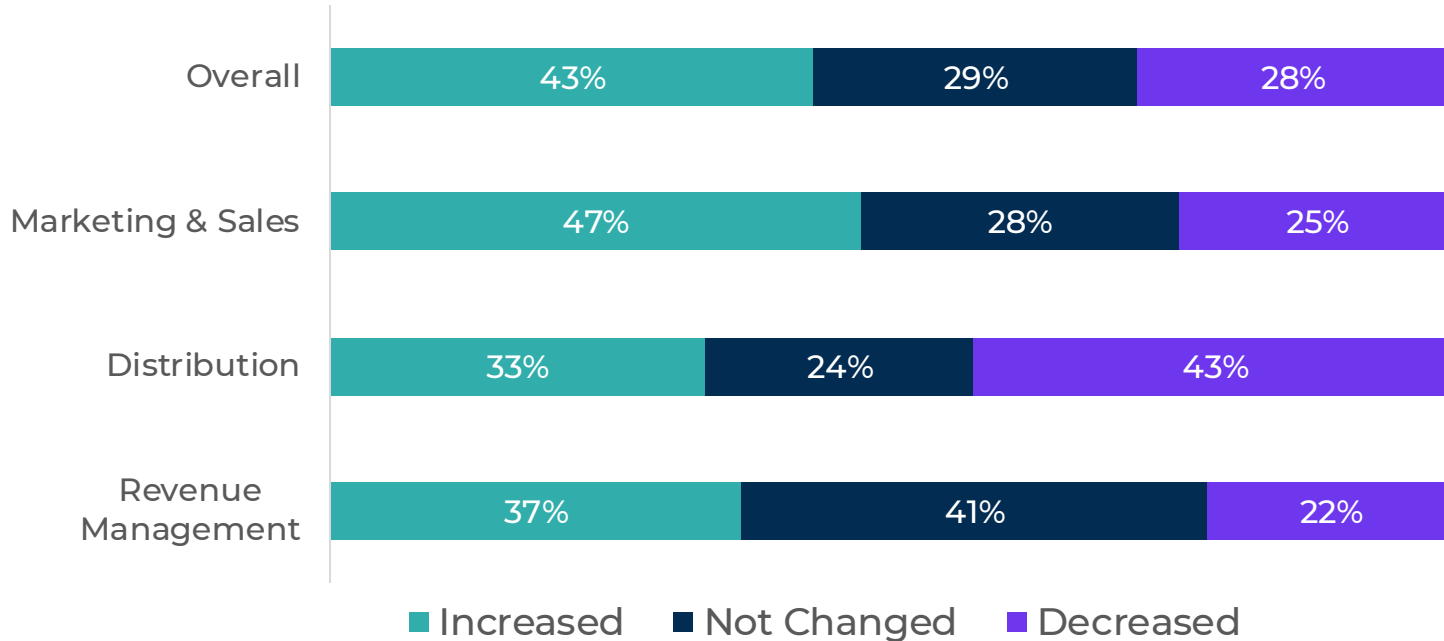
Large International Hotel Chain: Larger than 100+ properties, with presence in multiple countries

Regional or Mid-size Hotel Chain: Below 100 properties, with presence in a few countries

Independent Hotel: Less than 7 properties concentrated within one country

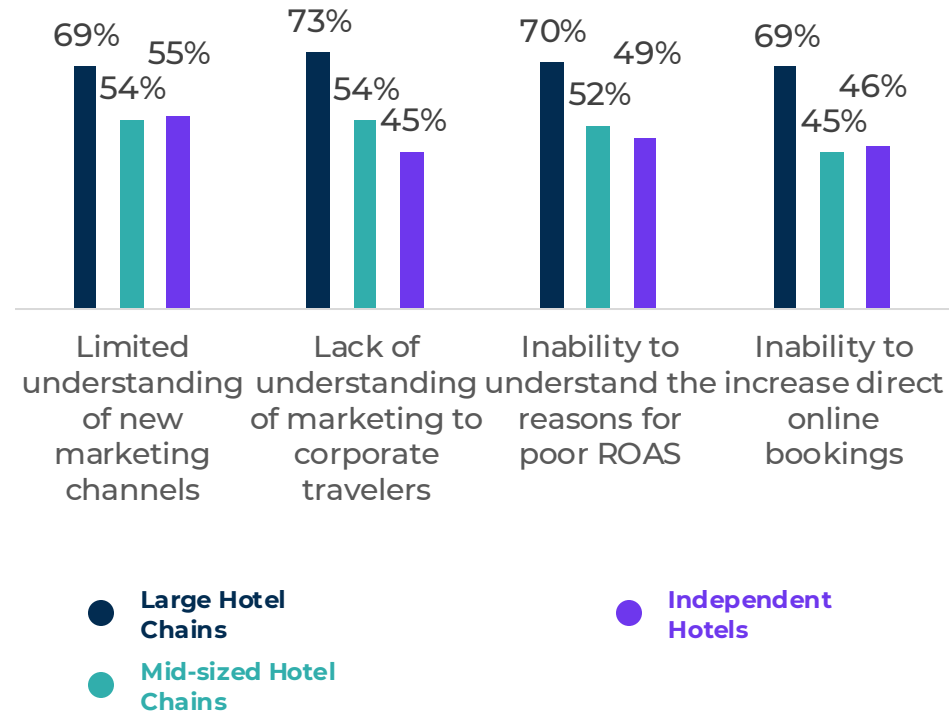
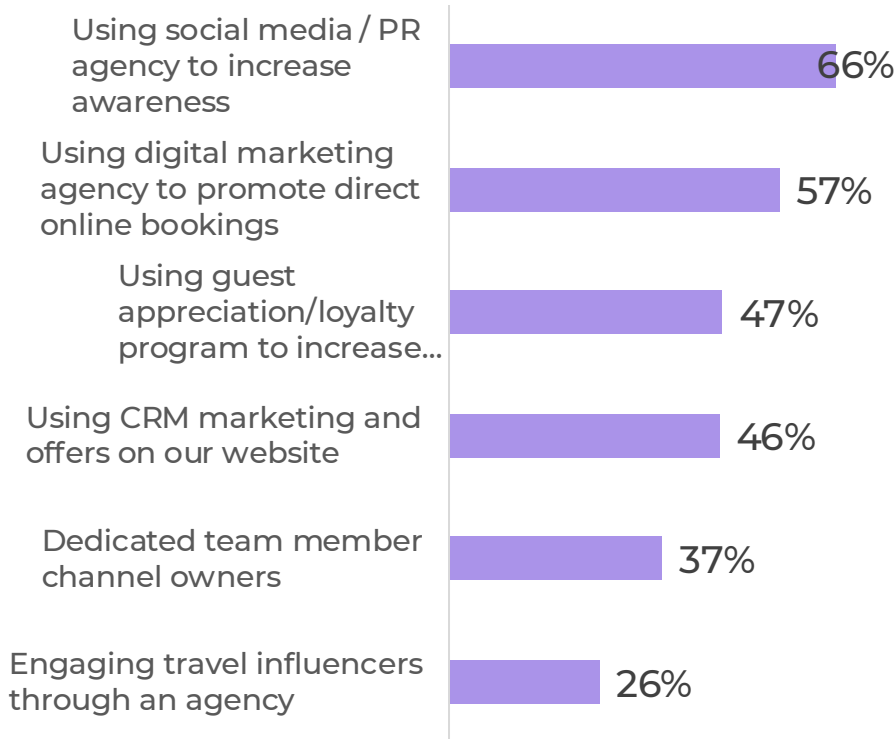
# Marketing Teams are Expanding, Distribution Teams are Contracting

## Change in Team Size: Dec 2023 vs Dec 2024



# Yet, Marketing Teams rely on Third-Party Agencies to help with Direct Bookings

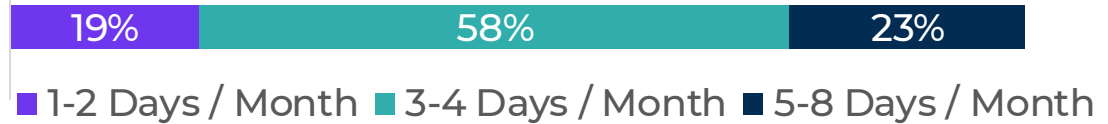
- But lack the expertise and / or knowledge of ROAS and new marketing channels



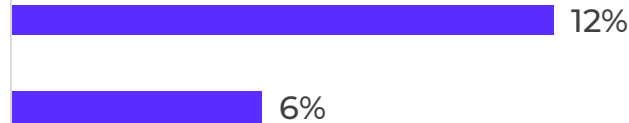
# Reporting is Still Manual

80% still spend up to two work-days each week on manual reports, and fewer than 20% invest in reporting tools

Time Spent in Generating & Analyzing Reports



Website Analytics like Google Analytics, Adobe Analytics, etc.  
Analytics tools like Looker, Tableau

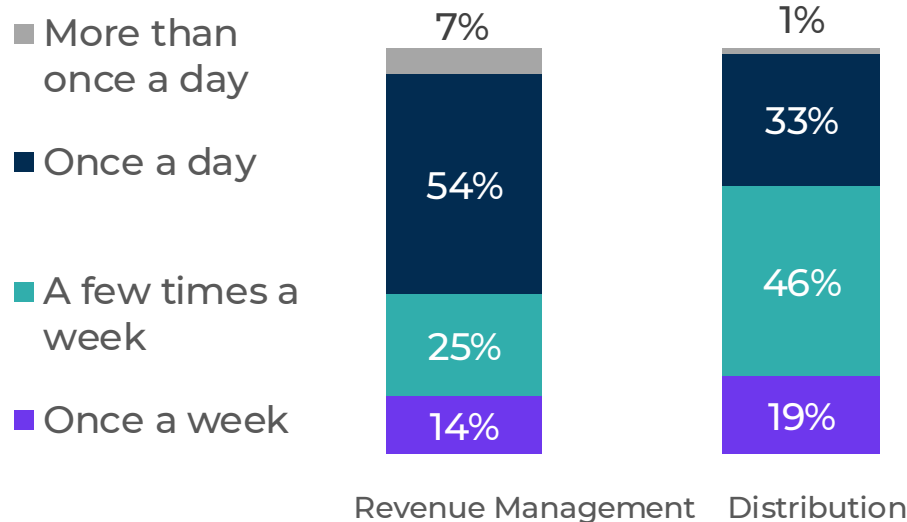


Current  
Technology  
Footprint

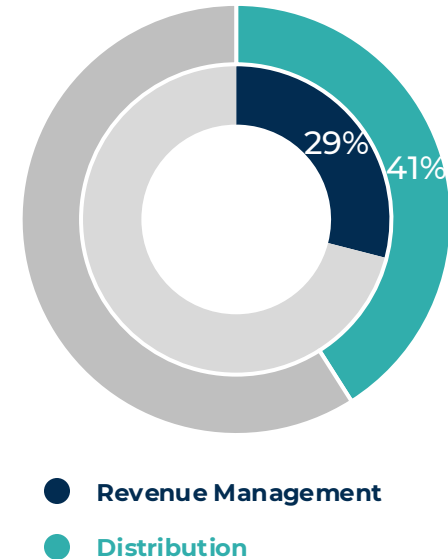
# Revenue Management Teams are sorted —Not Distribution Teams

Most reporting platforms are built for Revenue Management workflows, forcing distribution staff to stitch data manually.

## Frequency of Going through the Reports

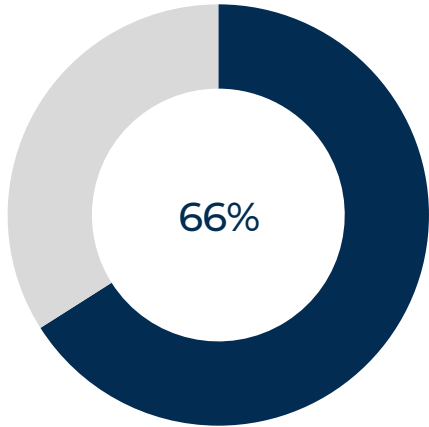


## % Hotels Manually Generating Reports

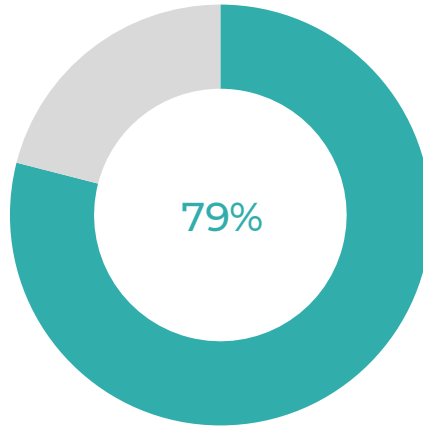


# Teams also struggle with Tracking Travel Intent

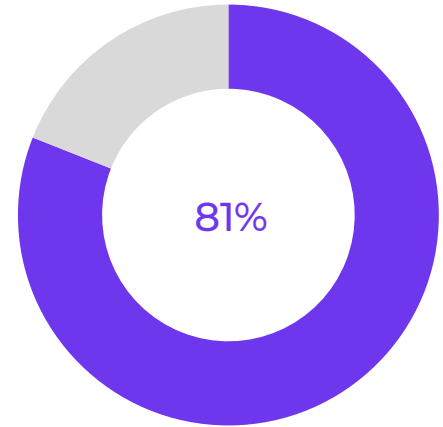
Thus, hampering their pricing and marketing accuracy



Large Global  
Hotel Chains

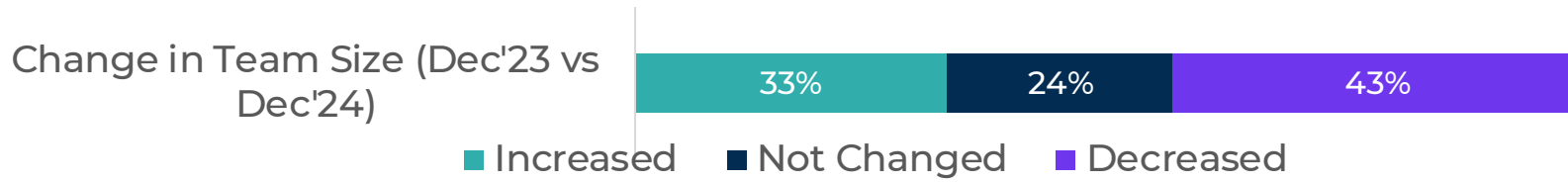


Mid-sized Regional  
Hotel Chains

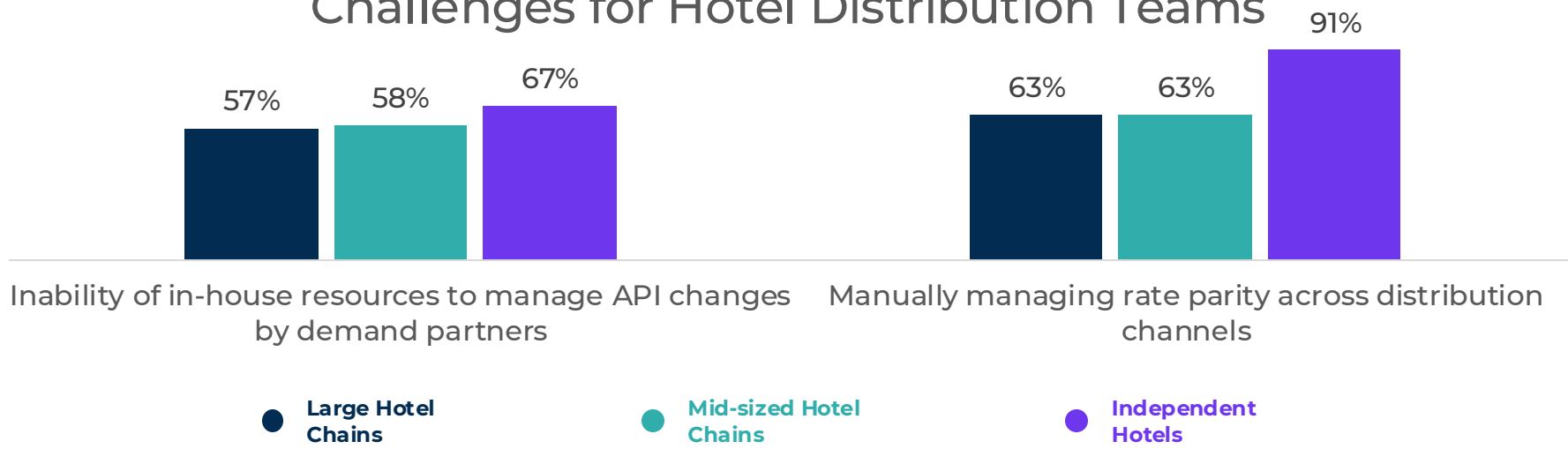


Independent  
Hotel Properties

# While Distribution Teams are Getting Smaller, Complexity of API Changes & Rate Parity Rises

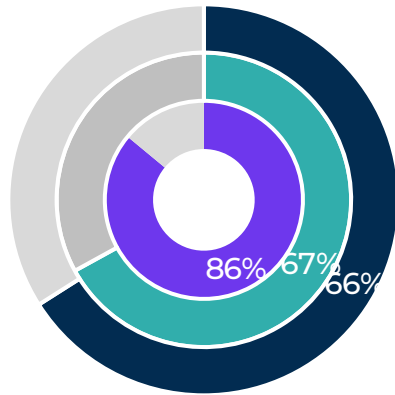


## Challenges for Hotel Distribution Teams

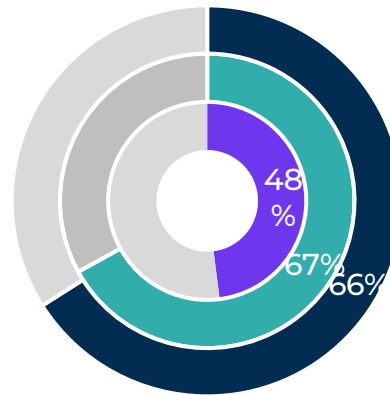


# ARI Management continues to be a big area where Distribution Teams want to Reduce Efforts

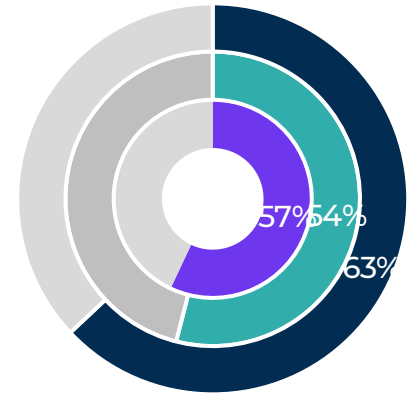
Updating rate packages  
across properties



Updating images &  
descriptions across channels



Identifying new  
demand channels



● Large Hotel  
Chains

● Mid-sized Hotel  
Chains

● Independent  
Hotels

And so, with focus on Increasing Direct Bookings,  
Hotel Technology priorities are the following:

Data governance  
and residency

Integrating disparate  
hotel technologies

Increasing efficiencies of  
existing technologies

Unsurprisingly, AI is at the bottom of priority for all hotels

Hotels want to first integrate and optimize their existing technology stack

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