



Resort Marketing

CONFERENCE

 **PHUKET**
HOTELS
ASSOCIATION

PHUKET 2 OCTOBER 2025

Digital Darwinism: Tech, Guests, and the Battle for Direct Bookings



Samantha Williams
Chief Customer Officer
Profitroom



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Digital Darwinism in Hospitality

Tech, Guests, and the Battle for Direct Bookings

This is a moment of digital Darwinism

It's time to adapt fast or risk becoming invisible!

In hospitality, we're not only competing on price or location. We're competing on:

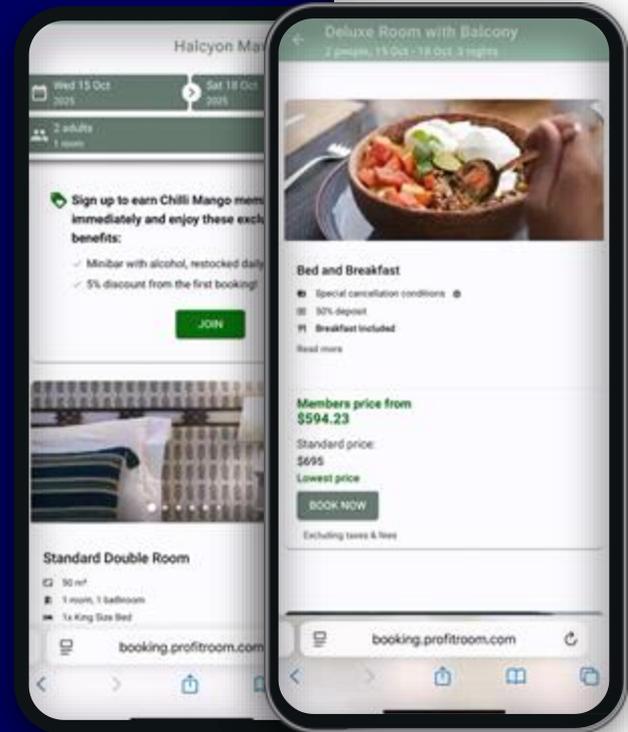
1. Technology
2. Personalisation
3. Digital trust



The Booking Battlefield

Your biggest competitor isn't another hotel, it's your own broken booking journey.

- 73% of bookings begin on mobile, but <25% hotel sites are fully optimised
- OTAs claim 49%+ of global online bookings
- 1 in 3 travellers prefer to book direct if seamless
- 89% abandon slow/confusing processes



Expedia Group (Partner hub, 2024):



Average length of an online Journey Planning Process

Expedia Group (Partner hub, 2024):

71

**Average length of an
online Journey Planning Process**

Expedia Group (Partner hub, 2024):



Interactions with travel content 45 days prior to booking

Expedia Group (Partner hub, 2024):

141

**Interactions with travel content
45 days prior to booking**

The Journey Planning Process



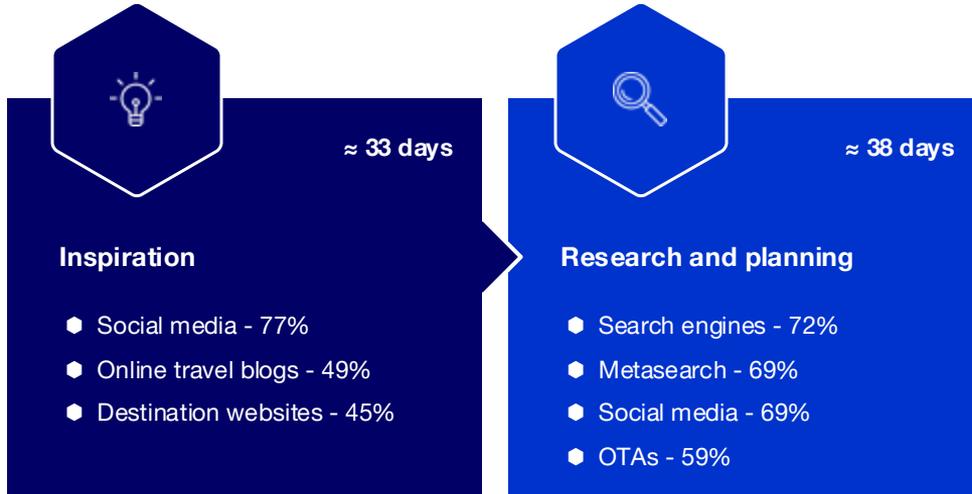
≈ 33 days

Inspiration

- Social media - 77%
- Online travel blogs - 49%
- Destination websites - 45%



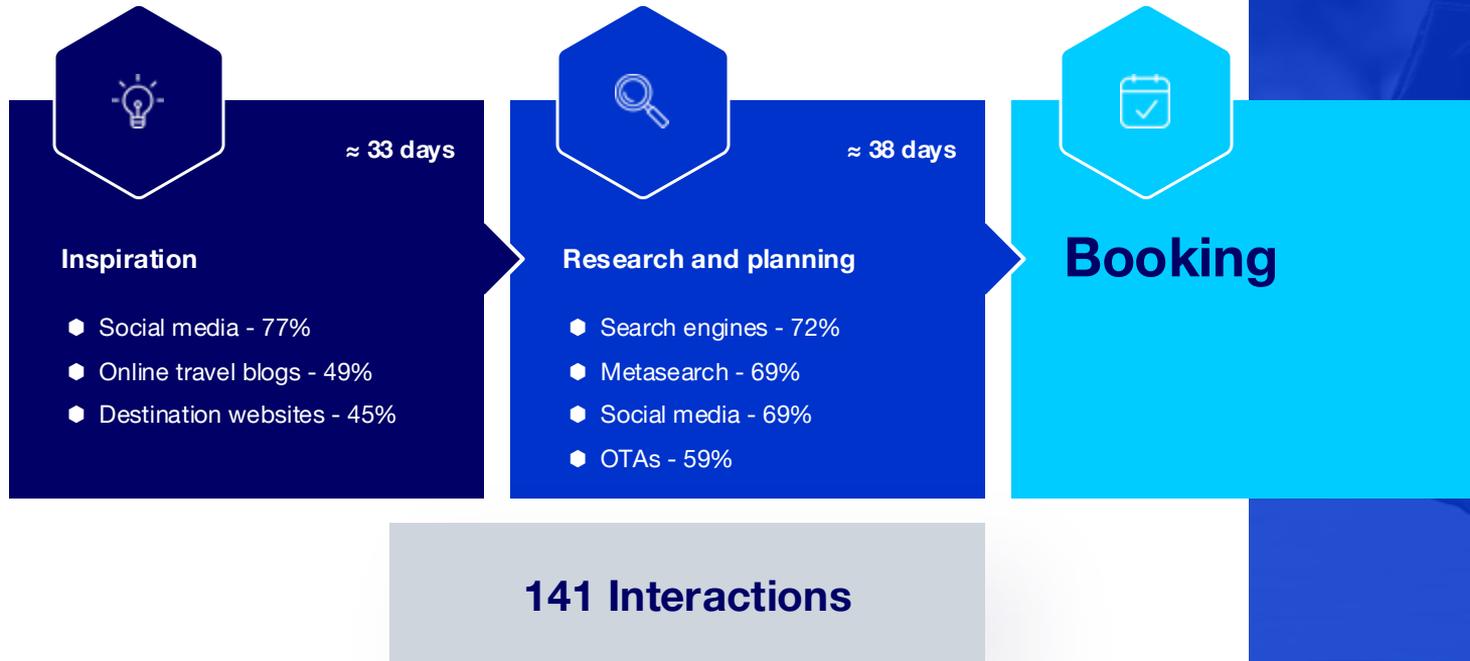
The Journey Planning Process



The Journey Planning Process



The Journey Planning Process





**“Maybe I will just target users on the
71st day of their Journey Planning
Process?”**

Your advertising competitors do not leave things to chance

2024	Advertising spend
Expedia Group	\$7 620 000 000
Booking Holding	\$7 270 000 000
Trip.com	\$1 630 000 000

Your advertising competitors do not leave things to chance

2024	Advertising spend	% of annual revenue
Expedia Group	\$7 620 000 000	55.7%
Booking Holding	\$7 270 000 000	30.7%
Trip.com	\$1 630 000 000	22%

The Rise of Direct

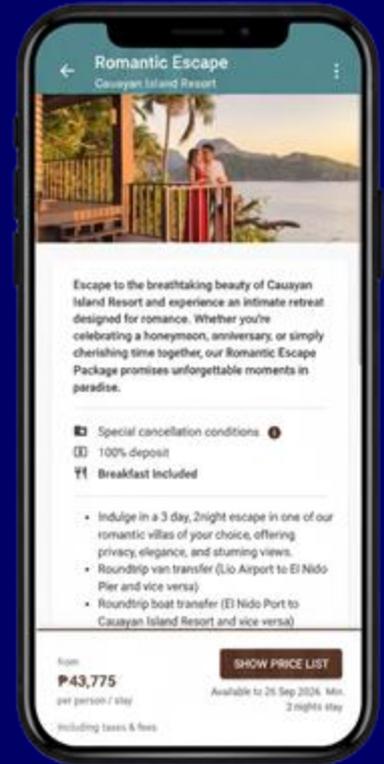
Direct bookings aren't just growing, they're exploding, but only for the Digitally Fit.

- Personalisation, loyalty, UX drive 30-45% higher direct revenue growth YoY
- Google Free Booking Links drive 10-15% of direct traffic
- Experience-based packaging increases conversion up to 70%



ADR
+26.5%
vs. standard rate plans

+50%
Direct booking share



Guests Are Thinking Like Consumers – **Are You?**

Today's guests expect you to know them, not after check-in, but before they even book.

- 63% would switch hotels for better personalisation
- 52% expect real-time experience availability
- 74% expect preferences to be remembered post-booking



The Social-to-Booking Journey

Social media is no longer just about inspiration – it's where bookings start, and increasingly, where they finish.

- 77% of travellers are inspired by social media with TikTok and YouTube outpacing traditional channels
- Only 12% of hotel brands optimise social booking journeys
- Shoppable reels & swipe-up booking driving real revenue



Thailand's B2B bookings are still stuck offline

It's time to combine Thailand's trusted relationships with digital speed, transparency, and scale.

- B2B spends 2–3x more, yet face the most friction
- 90% of bookings still managed manually
- <20% offer digital tools
- 9.8% segment predicted growth - 2033





The Silent Revolution

First-Party Data

- 45% of hoteliers rely on third-party data
- First-party CRM + preferences can lift marketing ROI 2-3x
- 59% of direct bookings influenced by targeted emails/loyalty

87.6%

OF BOOKINGS ARE PART OF LOYALTY

The New Blueprint for **Direct Booking Growth**

The winners in hospitality aren't adding more tech, they're connecting the right tech.

1. Consolidate tech and segments into guest-centric, data-connected ecosystem
2. Invest in UX & digital storytelling like e-commerce
3. Investing in loyalty, social, experience-led journeys



The Experience is the Brand

“ People don't book hotels. They book emotions.
Technology is how we deliver them at scale.

If you are not investing in brand, your tech and your
journey, you are investing in OTA's. ”

One comprehensive solution

Integrations



Profitroom Suite



Value Added Services



Our Services



Corporate Connect



Thank you!

Samantha Williams

Chief Customer Officer



samantha.williams@profitroom.com



www.profitroom.com



A tropical resort scene at sunset. The sky is a mix of purple, pink, and orange. The sun is low on the horizon over the ocean. In the foreground, there is a swimming pool with lounge chairs and palm trees.

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The logo for hsmai, featuring a stylized 'h' and 's' in purple and green, followed by the text 'hsmai' in a white, lowercase, sans-serif font.

hsmai

The logo for the Phuket Hotels Association, featuring the text 'PHUKET HOTELS ASSOCIATION' in a white, uppercase, sans-serif font.

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