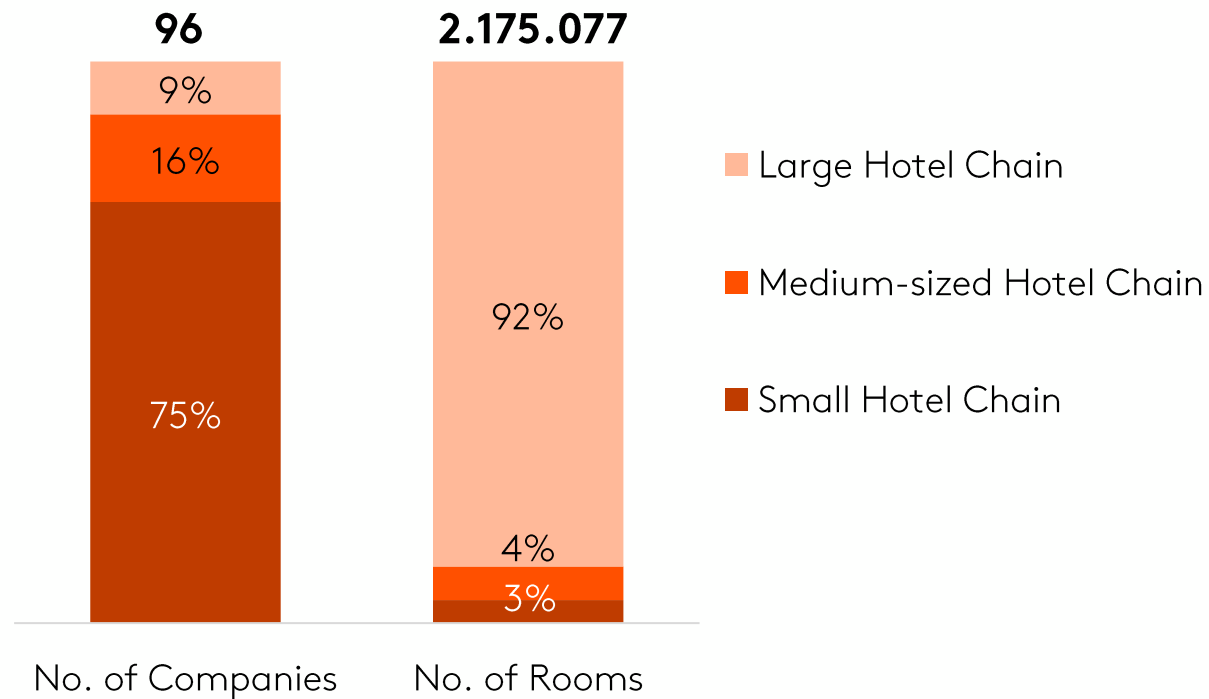


Distribution 2023: Das Ende einer Ära und der Neubeginn flexibler Systemsetups?

HSMA day, 7. September 2023

Teilnehmende Hotelketten nach Größe (%)



Includes 12 Voluntary Hotel Chains

Sponsoren

Amadeus Hospitality

Cendyn

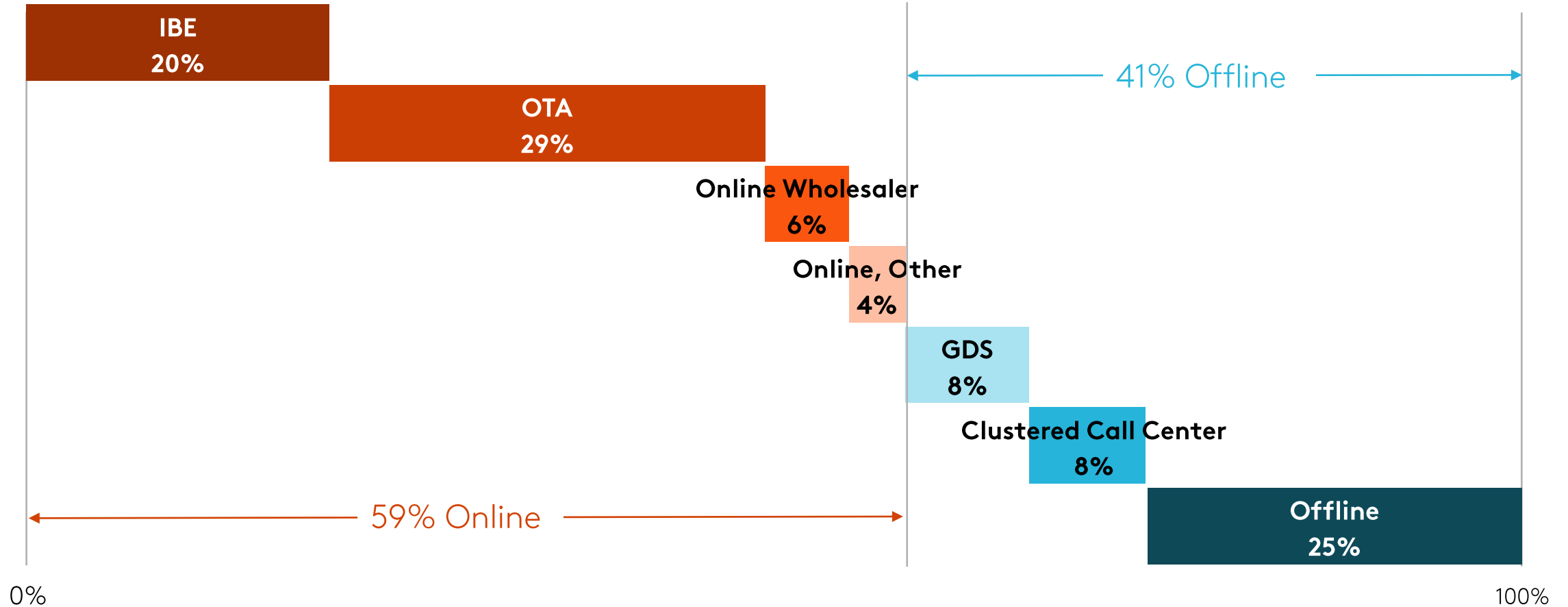
D-EDGE Hospitality Solutions

planet

Shiji Group

Distribution Channel Share, 2022

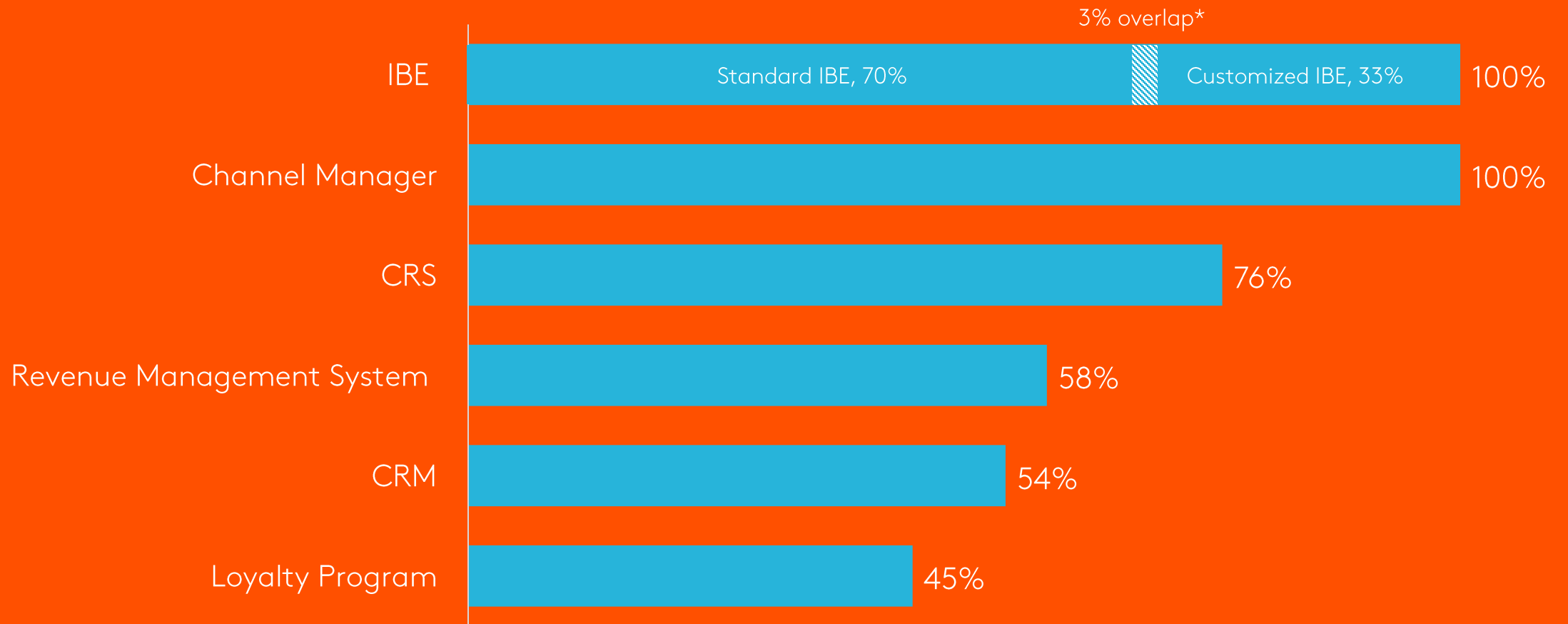
Core Shares, Total Average (% of rooms revenue)



Question: Please provide an overview of your Channel Mix (revenue share per channel as a percentage of total rooms revenue projected for 2022). (adds up to 100%). N = 89. **Note:** Core Share is the average of unweighted and weighted shares. **HIGH/LOW shares** are the maximum/minimum of unweighted and weighted total averages.

- **Zielgruppen** Verlagerung von Geschäftsreisen zu **Freizeitreisen und Direktbuchungen**
- **Kundenbindung** Vermehrt **Loyalty und Membership**-Programme
- **Kanäle** **OTAs** gewinnen Anteile
- **Technologie** **Weiterentwicklung** von Technologien im Hotel

Eingesetzte Systeme

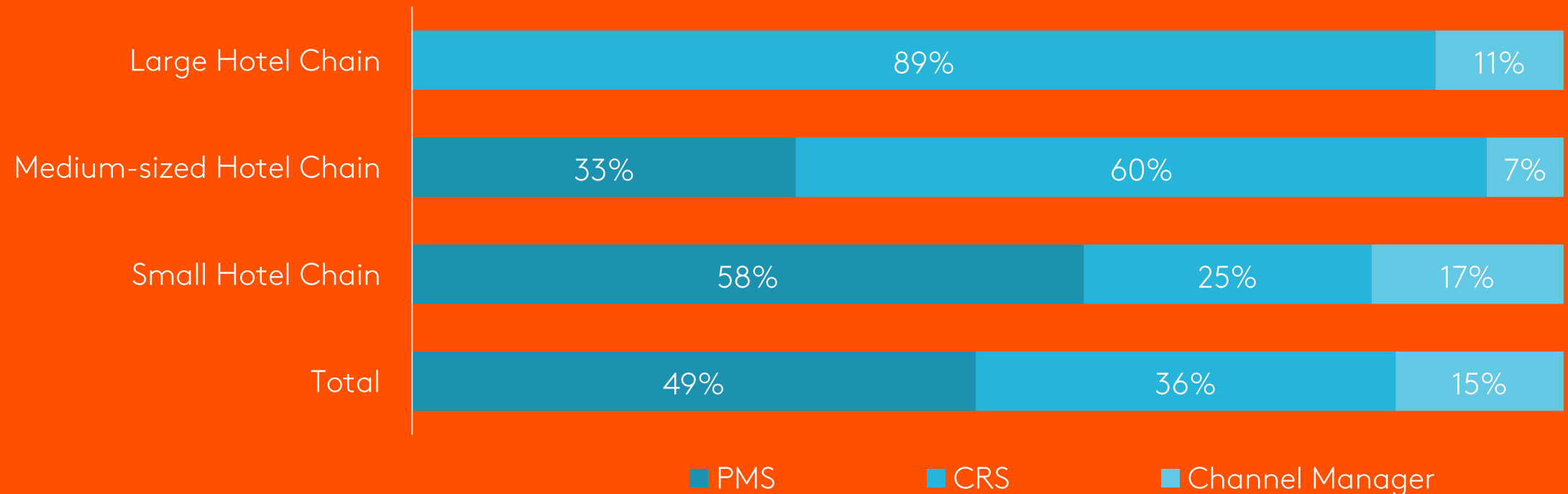


Question: On chain level, which of the following systems are employed? N = 96. Note: Some hotel groups and voluntary chains have a mix of e.g., standard and customized IBEs. Thus, multiple answers are possible. *Some chains use both standard and customized IBEs.

Führungssystem: Einheitsgröße unpassend

HSMA day

Leading Distribution System
(No. of Responses)

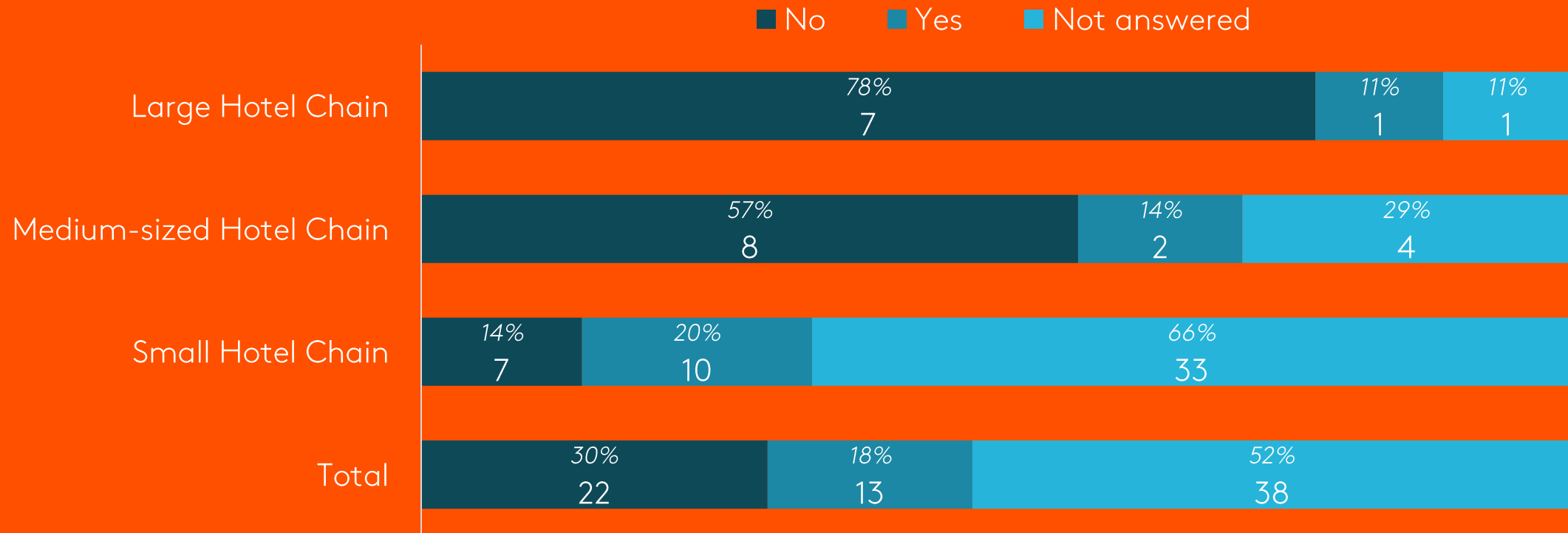


PMS (including PMS-integrated Channel Manager)
CRS (including CRS-integrated Channel Manager)
Channel Manager (Stand-alone)

Question: Where is distribution management placed within the hotel chains' tech stack i.e., what is the leading system today? N = 96.

Zwei von 10 könnten ihr CRS austauschen

Shall CRS be replaced over next 3 Years?
(No. of Responses)



Question: In your opinion, should other distribution management systems fully replace your CRS over the next 3 years? N = 73 (all chains with a CRS).

- **Weiterentwicklung der PMSs:** Multi-Property-Funktionen
- **Verbesserte Integrationsmöglichkeiten** durch offene APIs
- **Verbesserung des Direktgeschäfts durch CRM-Integrationen** mit PMS, IBE und CRS
- **Erhöhte Flexibilität beim Technologie-Einsatz**
 - **Kleine und mittelgroße Hotelketten:** *Option*, CRS-Funktionen auf andere Systeme zu verlagern
 - **Große Hotelketten:** CRS als Kernsystem



Kundenfokus

Wichtige Kanäle

PMS

Technologie-Ansatz

Raten-Management

Integrationen

Innovationskraft

- Leisure / Business

- IBE / GDS / OTAs

- Multi-PMS?

- All-In-One vs Best of Breed

- Zentral?

- Setup-Kompatibilität

- Weiterentwicklungen

Danke!

Kontakt

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