

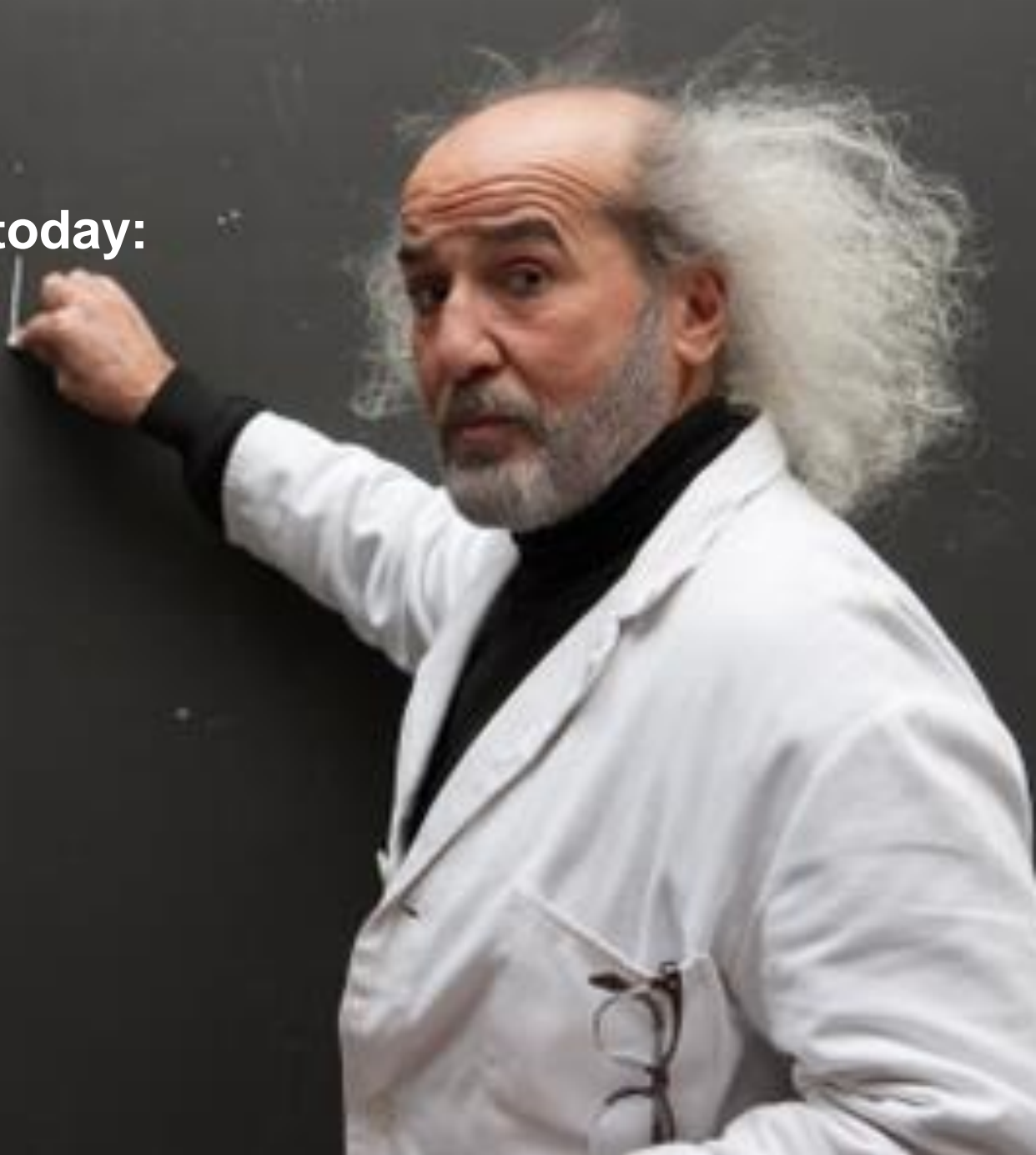
A man in a white shirt and tie stands on a high vantage point, holding a laptop and looking up at the sky. The year '2015' is formed by large, white, fluffy clouds against a bright blue sky. Below the sky, a dense urban landscape with many buildings is visible.

2015

**current state of distribution  
landscape**

**with you today:**

Lennert de jong  
citizenm hotels  
@citizenlennert



'Goedemorgen'.

This is the site to book your hotel in The Netherlands. Through BOOKINGS.NL, you have direct and easy access to a range of Dutch hotels, complete with up-to-date availability information.

Select an (available) hotel and fill in a booking form. After processing you will receive a confirmation of your booking by E-mail.

-  Start hotel search
-  Booking form
-  Map of The Netherlands
-  Touristic links
-  Information for hotels
-  About BOOKINGS.NL
-  Back to home page
-  Send us a message

\*Current time in The Netherlands is 06:04. 'Goedemorgen' means good morning.

© BOOKINGS.NL

Google!  
BETA

Search the web using Google

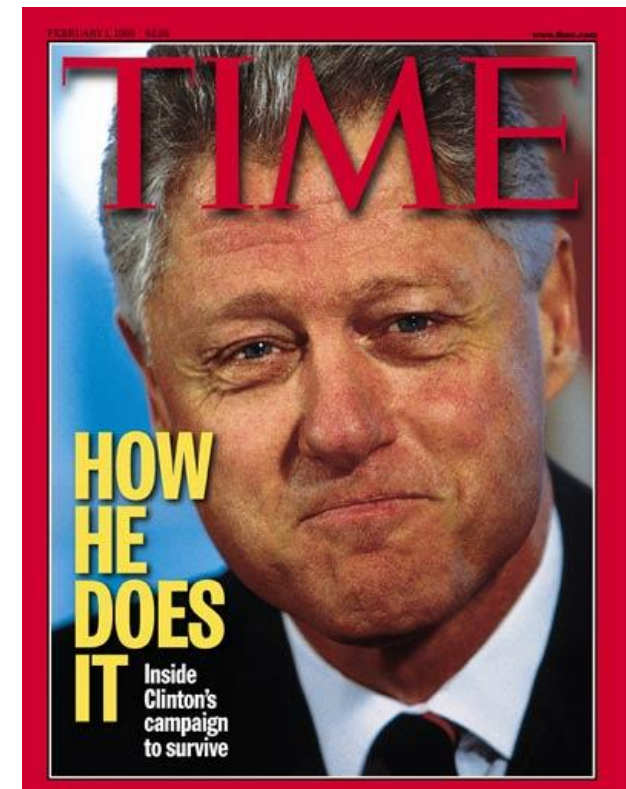
Google Search

I'm feeling lucky

[More Google!](#)

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a hotel in 1999





Hotel 15 years ago





Hotel 15 years ago





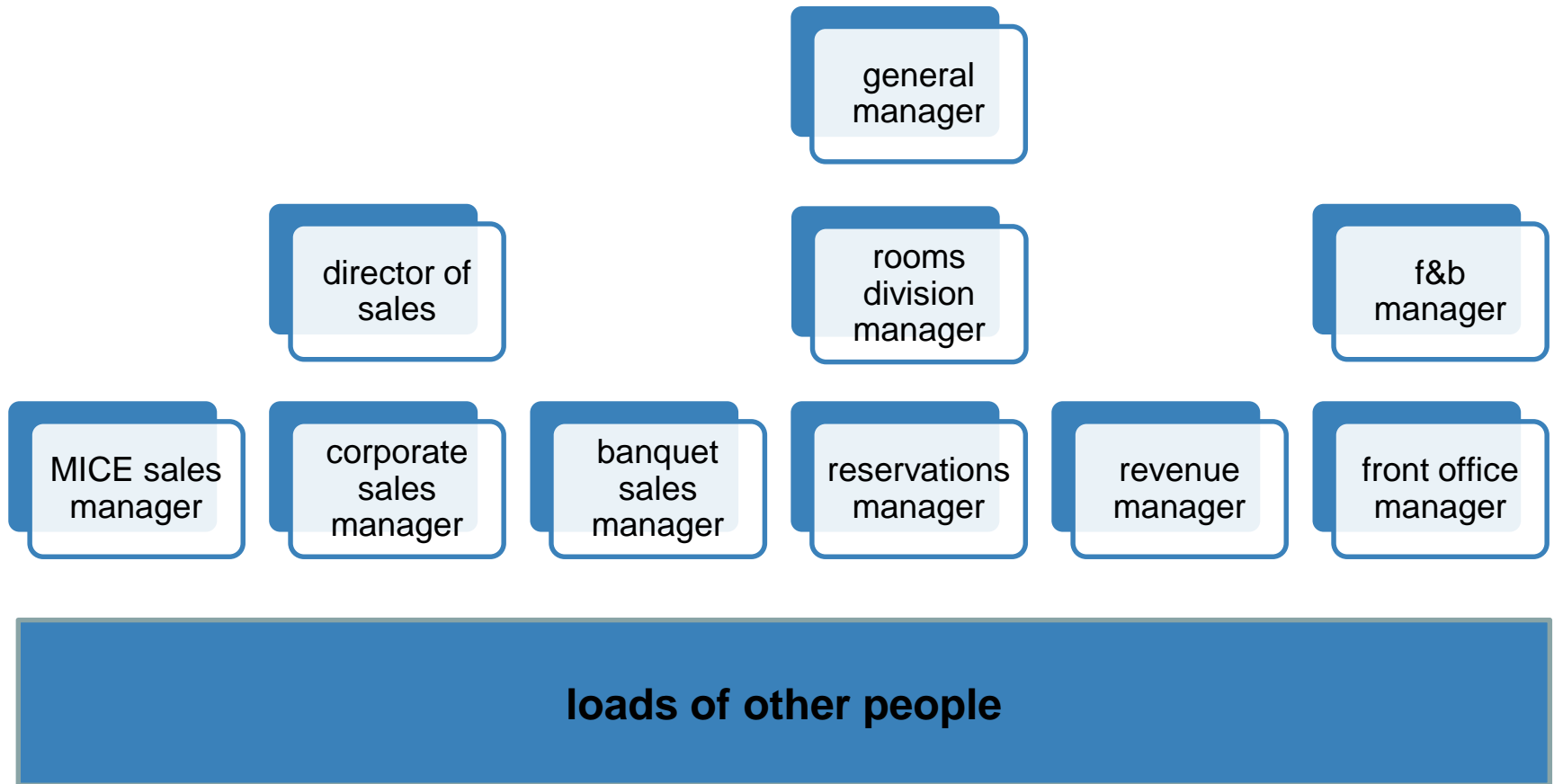
Hotel 15 years ago



**Hotel 15 years ago**



## Hotel 15 years ago





# 1999: revenue management

market segments, pace, price, historical, rms, overbooking



**Hotel nowadays**



**a hotel in 2015**



Hotel nowadays





Hotel nowadays





Hotel nowadays

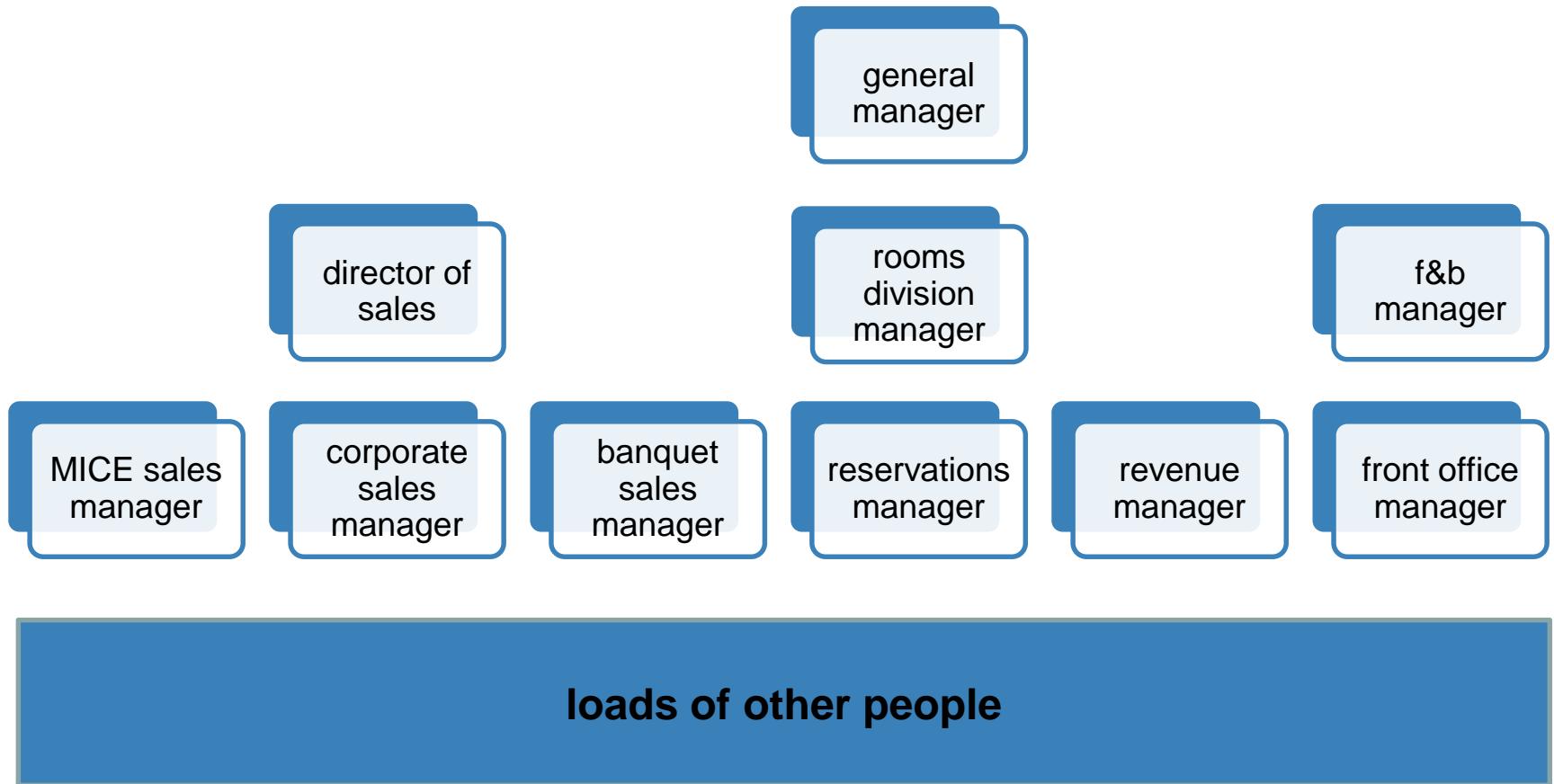




## Hotel nowadays



# Hotel nowadays



**but something changed**





# external data

# dynamic packaging

**touropoperators**

## costs

# airBNB

# dynamic corporate rates

## star ratings

# dynamic rates

housetrip  
.com

social  
media

# google adwords

yelp

# retargeting banners

# distribution costs

# agent model

# facebook advertising

digital  
advertising

online  
check in

labour

# SEA

## closed user groups

**callcenter**

# web 2.0

internal data

# SEO

## opaque model

1999-2010



**2015 - mostly consolidated into three giants**



**Booking.com**





why?

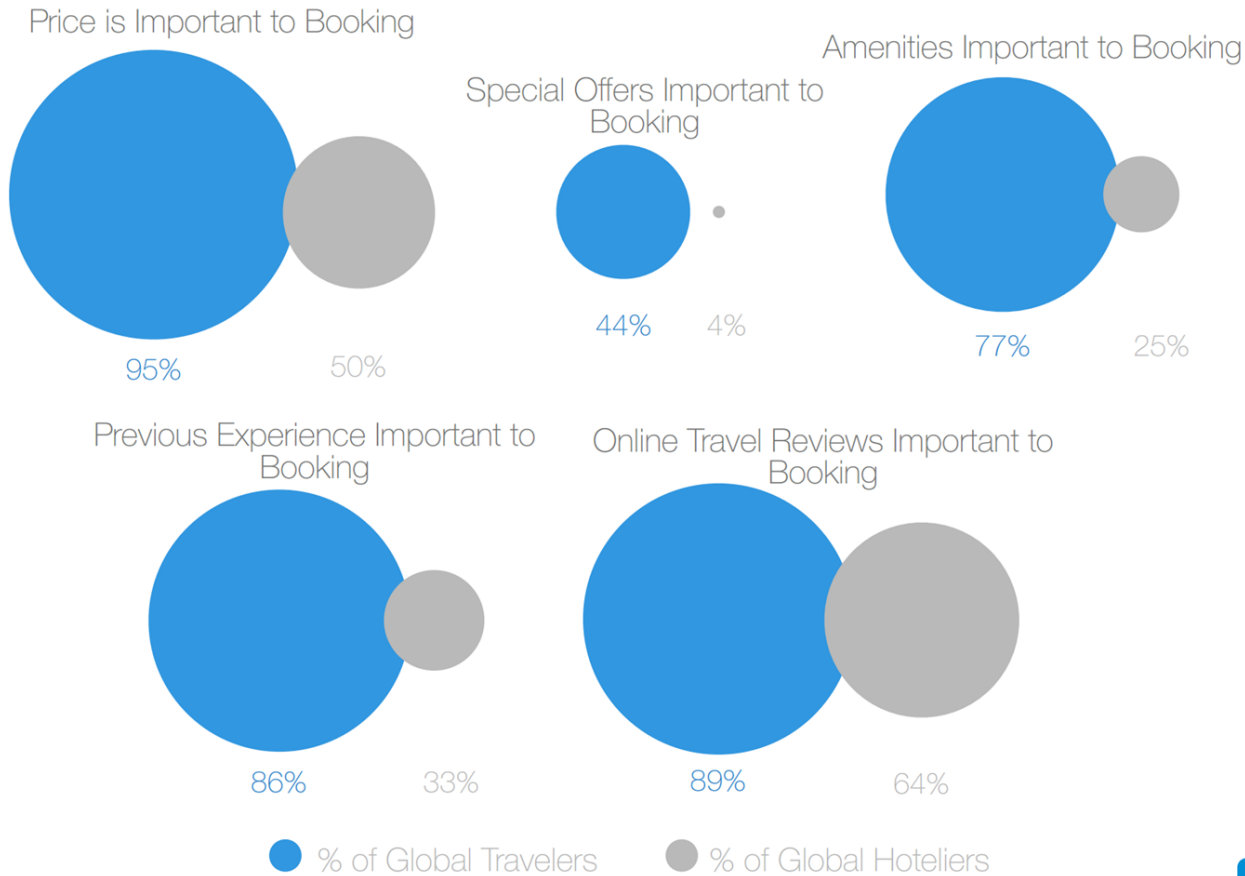
# iPhone

Apple reinvents the phone



## were hotels ever good in understanding customer needs?

### Perceptions of Service (2014)



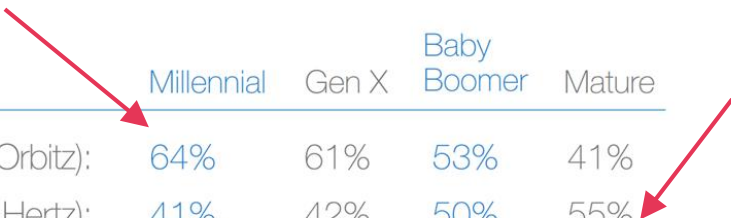
SOURCE: [TripAdvisor/SkiftStats: Apr 25 2014 \(1\), \(2\)](#)



where is the guest going?

## Choices of Online Travel Reservations by Age Group

---



	Millennial	Gen X	Baby Boomer	Mature
Online travel agency (e.g. Expedia, Travelocity, Orbitz):	64%	61%	53%	41%
Brand travel-service supplier (e.g. American Airlines, Hilton, Hertz):	41%	42%	50%	55%
Comparison-shopping site (e.g. Kayak or Dealbase):	39%	25%	23%	14%
Traditional travel-agent site:	7%	6%	6%	1%
Collective-buying website (e.g. LivingSocial):	7%	4%	6%	12%
American Express Travel Services online:	6%	5%	4%	5%
Private-sale/invitation-only deals site (e.g. Jetsetter, Vacationist):	6%	4%	3%	1%
Other:	6%	14%	22%	26%

source: Skift 2014



who has used one of these?

***PayPal***<sup>TM</sup>



what do they have in common with:



Booking.com

?

# category killers



are purely digital



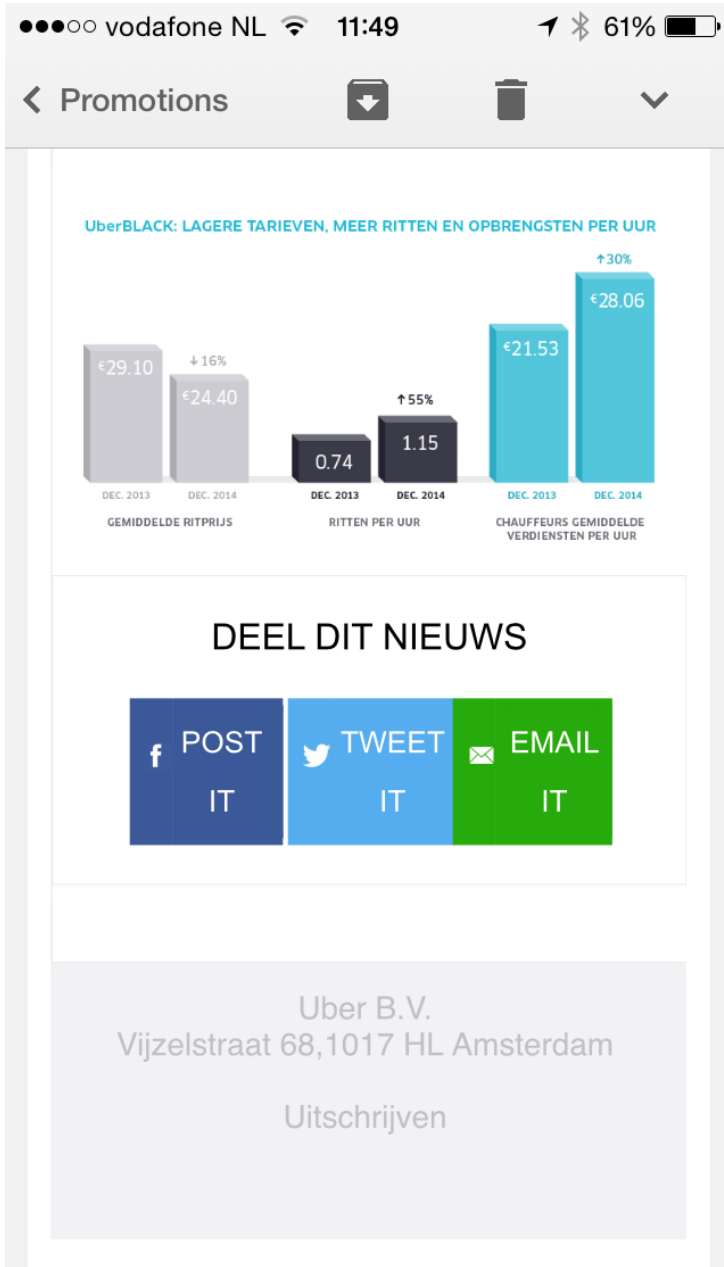
enough scale and target audience



are not in the business



# this came in last week

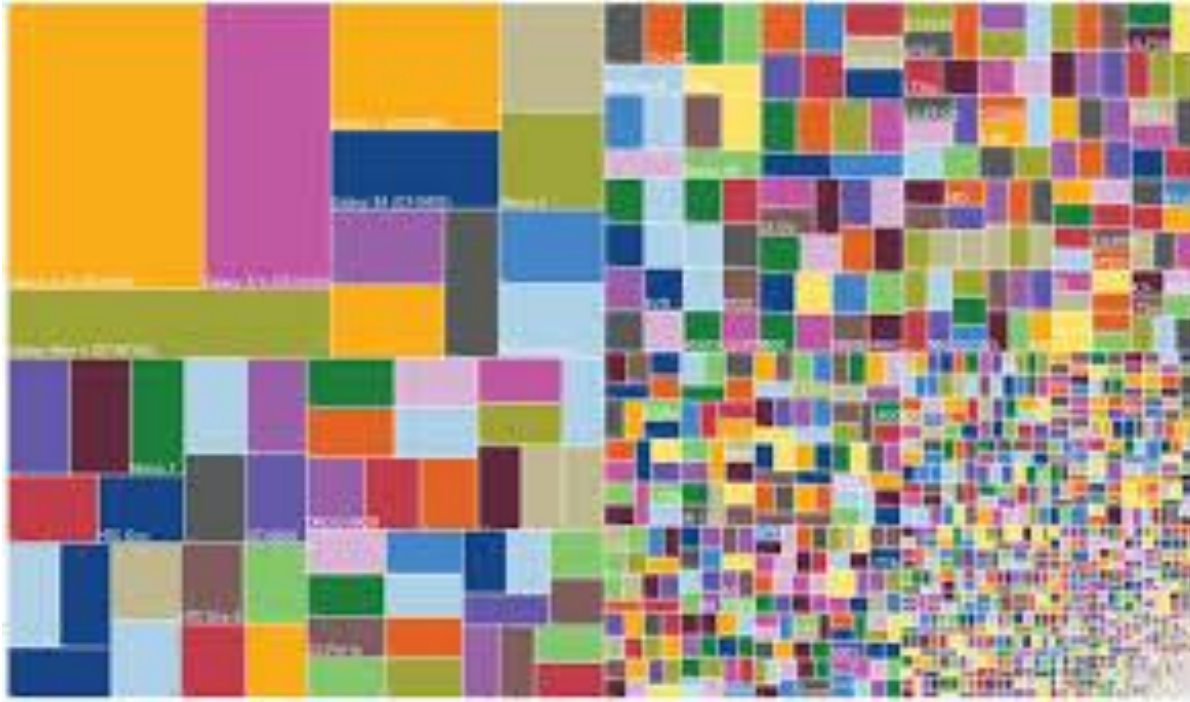


average ride price: down 16%  
average rides per hour: up 55%  
average earnings per hour: up 30%

**Uber doing revenue  
management for taxis**

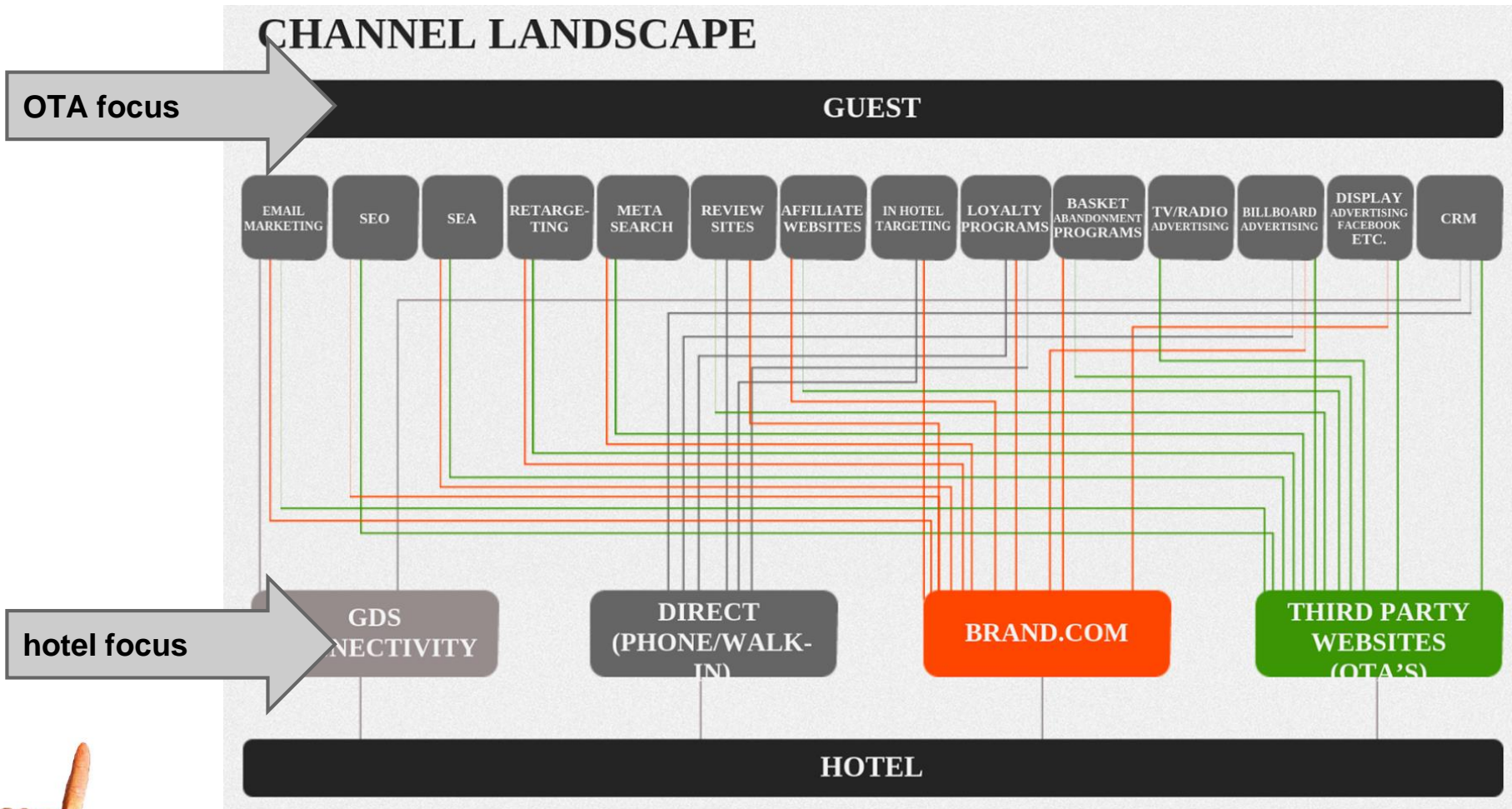
**and sharing this with  
users!**

our industry is fragmented (500.000+ properties)



mass consolidation is awaiting (and needs) to happen

# rate parity...



**the job of the RM is getting quite extended**

## 2015: shift to demand management

market segments, pace, price, rms, overbooking, historical, costs, channel, conversion attribution, digital marketing, external data sources, booking.com-expedia-tripadvisor data, GRI, a/b/c testing, sales funnel





# in 2014/2015



buys



buys



buys



where will this go, and what is our plan?

thank you

