HEDNA

VOICES

OPINION

Hotels optimized the price. Why not the partnership?

The industry spent forty years teaching one number to move on its own. Every other commercial decision still moves at the speed of a meeting — and the fix starts with structured opportunity data.

Jeremy Mahoney

Director North America, Agoda · Secretary, HEDNA Board

For the global hotel distribution community

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THE GAP

Two decisions, two speeds

Your revenue management system reviewed your rates a few hundred times yesterday. Your channel strategy was reviewed once last quarter — over coffee, with a market manager, off a slide deck.

RATE

Hundreds

of reviews yesterday, inside rules the hotel set once and the system applies continuously.

EVERYTHING ELSE

One

review last quarter — channels, segments, promotions, wholesaler strategy, partnership terms.

That gap is the biggest unclaimed opportunity in hotel distribution, and almost nobody is talking about it. Not because the industry lacks the technology — it has been building it for forty years — but because it pointed all of that capability at a single number.

WHAT THIS PIECE ARGUES

01 **The industry optimized rate and stopped there.** Channel, segment and partnership decisions never got the same treatment.

02 **Sellers already hold the missing signal.** It travels by slide deck and phone call, at the speed of a meeting cadence.

03 **Structured opportunity data is the unlock.** And it only works if the industry defines it together, not bilaterally.

SCOPE

The bigger frame, and the narrower ask

Start with the honest version of the problem. Pricing, marketing, loyalty, sales, contracted rates, packages and promotions all shape demand and profitability — and they are all managed as separate activities. **A campaign changes what price will hold. A loyalty offer changes channel mix. A rate contracted today shapes revenue for years.** None of these decisions operate independently, and none of them are coordinated toward a single commercial objective.

> *The real opportunity may be less about connecting hotels and sellers, and more about creating a shared decisioning framework where pricing, marketing, loyalty, distribution, and sales activities are continuously coordinated toward common commercial objectives.*
>
> **Stephen Hambleton** · AVP Product Management, IDeaS

He is right, and that is the destination. **This piece deliberately starts one step short of it** — with the distribution layer, because it is the piece that can actually be standardized, and the piece a neutral body has standing to convene. Whole-organization coordination is a hotel design problem and a vendor roadmap problem. A shared taxonomy is a definitions problem, and definitions are what get written in rooms like this one.

And distribution is less narrow than the word suggests. All of the following already move through the same pipes:

- **Loyalty and member rates**
- **Corporate and contracted**
- **Packages and promotions**

Solve the signal layer here and the same pattern extends outward. Start with the whole system and there is nothing specific enough to build.

WHERE WE STARTED

Forty years of optimizing one number

Give the industry credit for what it has already built. Revenue management came out of the airlines, moved into hotels as computerized systems let properties track demand, and matured into a data science. The internet era multiplied the channels. The RMS kept up.

1960s–'70s	1980s	1989	1990s	Today
Born in the airlines	Into hotels, on a schedule	IDeaS founded	Yield becomes data science	Continuous, not seasonal

15–20%

typical RevPAR lift from a modern revenue management system. HotelTechReport's 2026 revenue management buyer's guide, drawn from a survey of 4,736 hoteliers across 110 countries.

One thing worth saying plainly: **An RMS is the hotel's own tool, running on the hotel's own data and sometimes market data, operating inside rules the hotel sets.** The judgment stays with the hotel. What changed over forty years isn't who decides — it's how often they get to.

> *This is a genuine success story. It is also a strangely narrow one.*

WHERE WE STOPPED

The decisions still made by phone call

Which channels are open. Which segments get a discount. Whether to activate an opaque rate, a package, a member deal, a mobile-only or origin-market promotion. When to lean into a wholesaler, and when to pull back.

Notice

An account manager flags an opportunity. A sales call surfaces a soft period.

Agree

A quarterly business review produces three action items, two of which happen.

Configure

Someone on each side builds it by hand — a week after the demand appeared.

These are commercial decisions, and in 2026 they are still made the way they were made in 2006: through relationships. **The full breadth of what a channel can do gets deployed through a fraction of its capability** — retail visibility, opaque placement, audience targeting by device and origin market, member pricing, value-adds — because deploying any of it requires a person on each side to notice, propose, agree and configure.

> *We have automated the rate, but not the commercial system around the rate. That is a version of what I call “optimizing to fail”: the RMS may make better price decisions, but channel mix, segment deals, wholesaler strategy, and partnership terms still shape the demand it is trying to optimize. The real opportunity is to create the data standards and decision processes that allow the industry to optimize the business, not just the room rate.*
>
> **Sherri Kimes** · Professor Emerita, Cornell University

The irony*: the sellers of travel already hold the data that would close this loop.*

THE ARGUMENT

The next unlock for hoteliers isn't a smarter price — it's structured opportunity data. Put the demand signal in a form hotel systems can read, and the sales process becomes far more streamlined as the outcome improves.

Jeremy Mahoney
Director North America, Agoda · Secretary, HEDNA Board

WHAT GOOD LOOKS LIKE

What the connected version looks like

A hotel's forecast says occupancy is soft eighteen days out. Seller-side data shows demand building in a specific origin market, on mobile, in a price-sensitive segment. Today that means someone spots it, someone calls someone, and a promotion goes live — maybe — a week later.

01

Signal

The hotel's forecast and the seller's demand view arrive in the same place, in the same format.

02

Act within guardrails

Open a targeted channel. Add a value-add rather than cut rate. All inside limits the hotel set.

03

Measure

Every move is an experiment with a result attached, not a favour with a follow-up call.

04

Adjust

Continuous, across the full capability of every channel — the same discipline already applied to rate.

This is not science fiction. It is the architecture the industry already trusts for rate, extended to the decisions next door — and **most of the pieces already exist.**

> *What's missing is the layer in between — an agreed way for sellers to expose segment-level opportunity to hotel systems, in a format every platform can read.*

THE MISSING LAYER

Two of three pieces are already built

BUILT

Connectivity standards

Rates, availability and booking messages have moved system to system for decades.

BUILT

Commercial platforms

Already extending beyond rate into channel and distribution decisions.

MISSING

Demand-opportunity data

No shared way to express segment-level opportunity that hotel systems can read.

> *Standardizing "demand opportunity" requires sellers to move past proprietary data silos and establish a unified taxonomy so commercial platforms can interpret local demand signals consistently. However, technology alone isn't enough — commercial contracts must also evolve to grant systems the dynamic flexibility to open, close, and adjust distribution levers in real time.*
>
> **Chinmai Sharma** · SVP & Global Head, Lodging, Ground and Media, Sabre

That second half is the one the industry keeps skipping. **A taxonomy without contractual permission to act on it is a very well-formatted email.**

> *The opportunity isn't just smarter pricing — it's smarter commercial decision-making, enabled by improving data standards, greater connectivity, and AI, while ensuring revenue managers remain in control.*
>
> **Eddy Veldhuizen** · Senior Director Connectivity Ecosystem, Booking.com

That last clause is the design constraint, not a caveat. **A standard that takes the decision away from the revenue manager will not be adopted, and should not be.**

THE HOTEL SIDE

The signal has to travel both ways

Seller-side demand data is only half the exchange. **A hotel's need dates are not purely market-driven.** They are often specific to that property, invisible in any comp-set signal, and known only to the commercial team — which is exactly why the relationship still carries the load today.

Group wash

Blocks release late and the replacement demand has to be found fast.

Renovation

A refurbished floor, or a new market entry, changes what the hotel needs to sell.

Audience goals

Diversifying the mix is a strategic objective, not a response to a rate signal.

> *Often commercial decisions are multi-factorial. Need dates are not just market driven but can be unique to a hotel's situation such as group wash, new market entry, renovation, or audience diversification goals. Commercial leaders must be proactive in seeking opportunities and ensuring that they are in sync with their distribution partners, not just at QBRs. Here the sales relationship matters. Today the data is sourced through disparate and fragmented systems and lacks the complete picture, but AI has the opportunity to change the game.*
>
> **Miki Gulati** · Corporate Director, Distribution Partnerships, Omni Hotels & Resorts

This is the strongest case for the relationship model, and it is not nostalgia — it is the only channel hotel-specific context currently has. **A standard that carries only seller signals solves half the problem.** The exchange has to run both ways.

THE COMMERCIAL TEAM

Enabling our people to do what they do best

The scarcest resource in a commercial organization is not effort. **It is judgment** — and too much of it currently goes into plumbing: spotting the opportunity, negotiating the one-off, chasing the configuration, confirming it went live. Structured opportunity data changes what the conversation is about, not who is in it.

> *We have spent years teaching our systems how to optimize price, but many of the decisions around demand optimization and opportunity still depend on manual coordination, individual relationships and conversations. The next evolution is not removing the relationship from distribution. It is elevating it. Partnerships should shift from one-off reactive conversations to a more forward-looking strategic dialogue around demand signals, commercial goals, and measurable outcomes.*
>
> **Kathleen Cullen** · Executive Vice President, PTG Consulting — Hospitality

Elevating it is exactly right. The best market-manager conversations of the next decade won't be about individual promotions, or activating an ad product — less "can we get a placement in March," more "here is what we are solving for, and here is how we will know it worked." **And there is a floor under all of it that no standard replaces.**

> *The weight of the partnership trumps the technology when there isn't a sufficient base of trust that the channel you put your offers on will respect your distribution strategy.*
>
> **Olaf Belgraver** · Director, Chains, Booking.com

Structured data can make an opportunity legible in seconds. It cannot make a partner trustworthy. **A standard lets trust scale once it exists — it is not a substitute for earning it.**

THE OBJECTION

So why doesn't this already exist?

It is the fair question, and it deserves a better answer than inertia. The easy one is that segment-level demand insight has commercial value, and value gets sold rather than published. **The harder one sits underneath it.**

> *The easy answer for why this doesn't exist is monetization — value gets sold, not published. The real one is attribution: expose an opportunity and you can't guarantee you capture the booking it creates, so sharing looks like pure downside. But that assumes a fixed pie. The demand a hotel captures because it saw the signal in time didn't exist before the signal moved — it's incremental for both sides. The question isn't what either gives up; it's what neither is currently earning.*
>
> **Anisha Yadav** · Founder, TRevPAR Insights

That is the sharpest diagnosis in this whole piece, and it reframes the ask. **A seller withholding opportunity data is not being obstructive — it is behaving rationally under a measurement problem.** Surface a signal you cannot get credit for and the cost is certain while the return is not.

Which means the standard has a second job. Alongside the taxonomy, it has to carry enough of an attribution model that both sides can see what the signal produced. **Get that right and the incentive inverts:** exposing opportunity stops being a concession and starts being the fastest way to grow the base. That is a harder standard to write than a field list. It is also the only version anyone will actually adopt.

THE INVITATION

Why this is a HEDNA conversation

None of this works bilaterally. **If every seller exposes opportunity data in its own format, hotels drown in integrations and the idea collapses under its own plumbing.** This is a standards problem, a connectivity problem and a data-definition problem — which is to say, precisely the kind of problem this industry has solved before, together, in neutral rooms.

If you build commercial platforms

What would your system do tomorrow with segment-level opportunity data?

If you run hotel commercial teams

What would you want a seller to see that no market signal shows?

If you sit on the seller side, as I do

What can we realistically share, and what can't we?

And if you think the frame should be wider

So do I. That version needs more authors than one — come write it with me.

I would rather start this conversation with a working definition on the table than a blank page.

HEDNA exists where distribution gets complicated. Founded 1991

HEDNA
VOICES

IN CLOSING

Let’s define demand-opportunity data before someone defines it for us.

The industry has solved harder definition problems than this one, and it has solved them in the open. The pieces are built. What is missing is an agreement about what a demand signal is — and a way for both sides to see what it produced.

Jeremy Mahoney
Director North America, Agoda · Secretary, HEDNA Board

Views are the author’s own and do not represent HEDNA or its members.

WITH THANKS

Contributors

My thanks to the eight people below, who gave their time and their perspectives to this piece. **It is a better and more useful article for their contributions** — and for the points on which they saw it differently.

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