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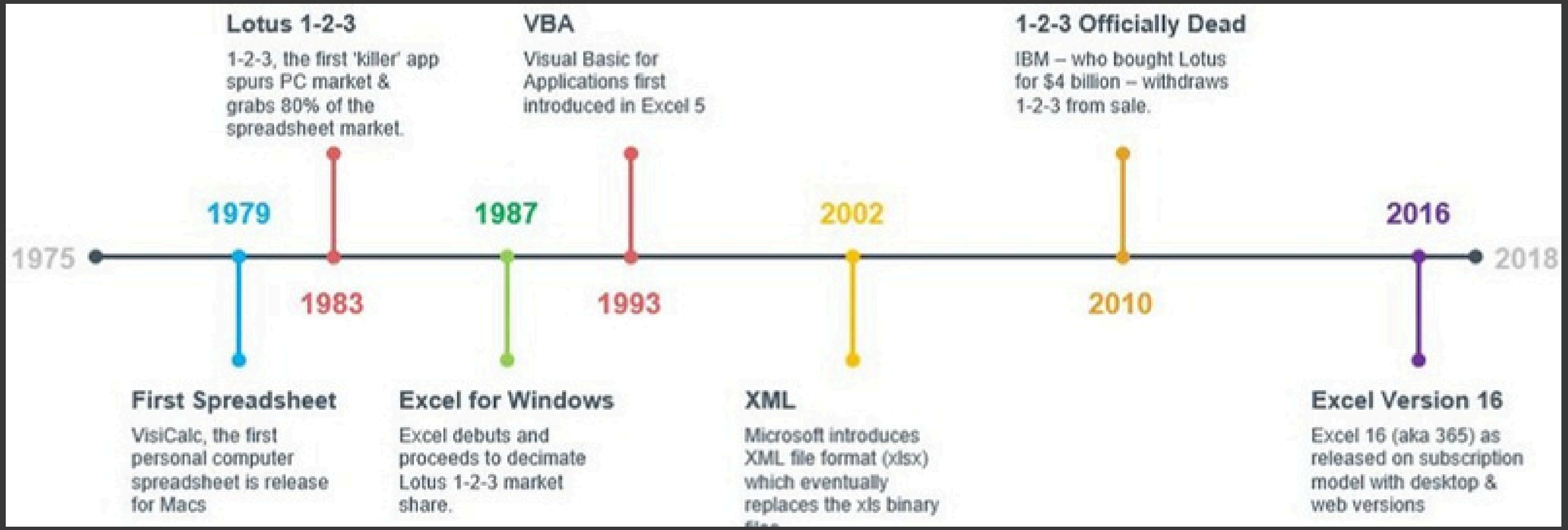
TECH – FRIEND OR FOE?

NOT ALL TECH SURVIVES



The massive investment in a legacy codebase and the organizational structure dedicated to supporting the existing platform becomes technical and cognitive debt. This burden prevents the incumbent from fundamentally redesigning the software architecture for the emerging markets.

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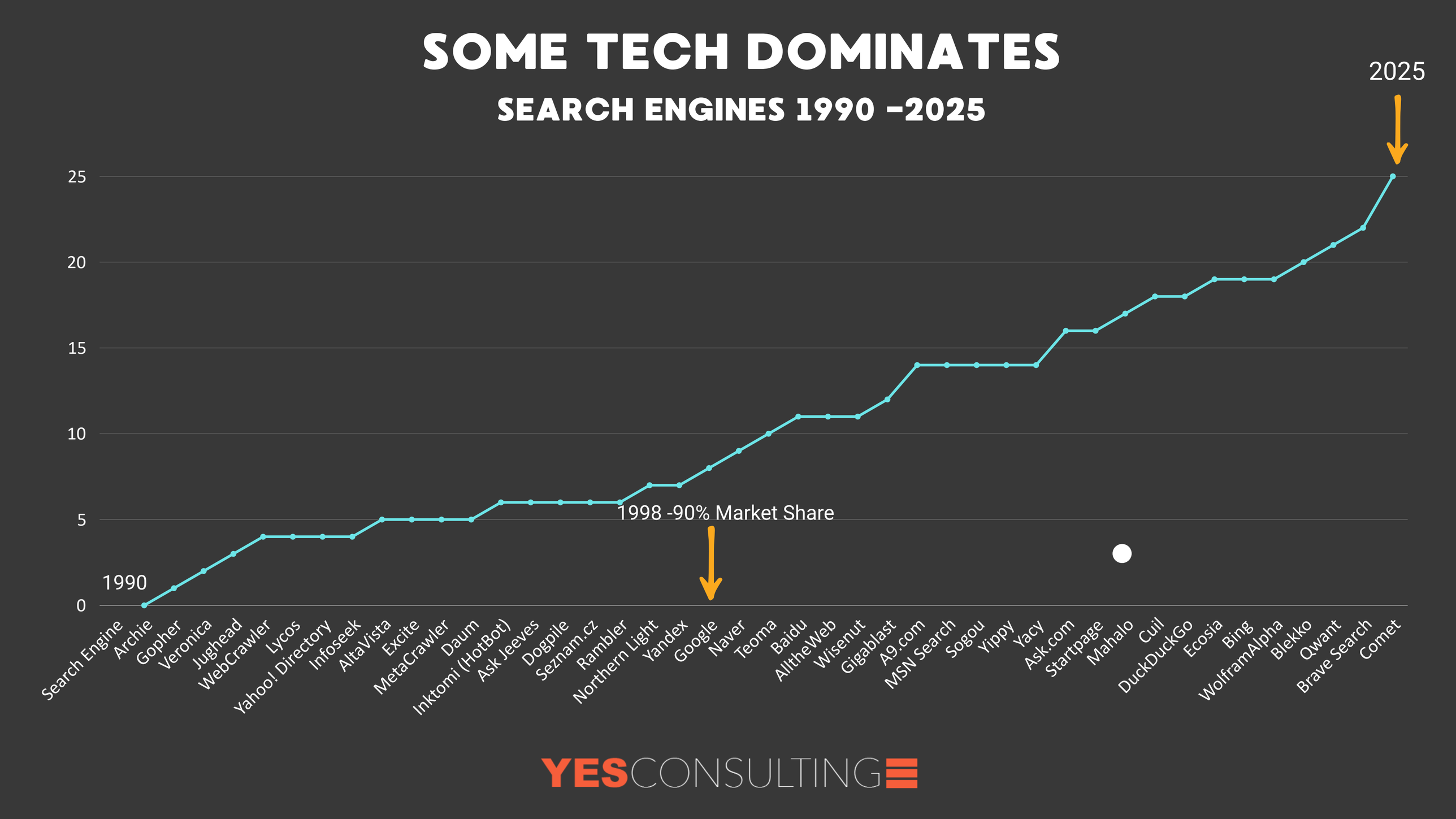
SOME TECH DOMINATES

SEARCH ENGINES 1990 –2025



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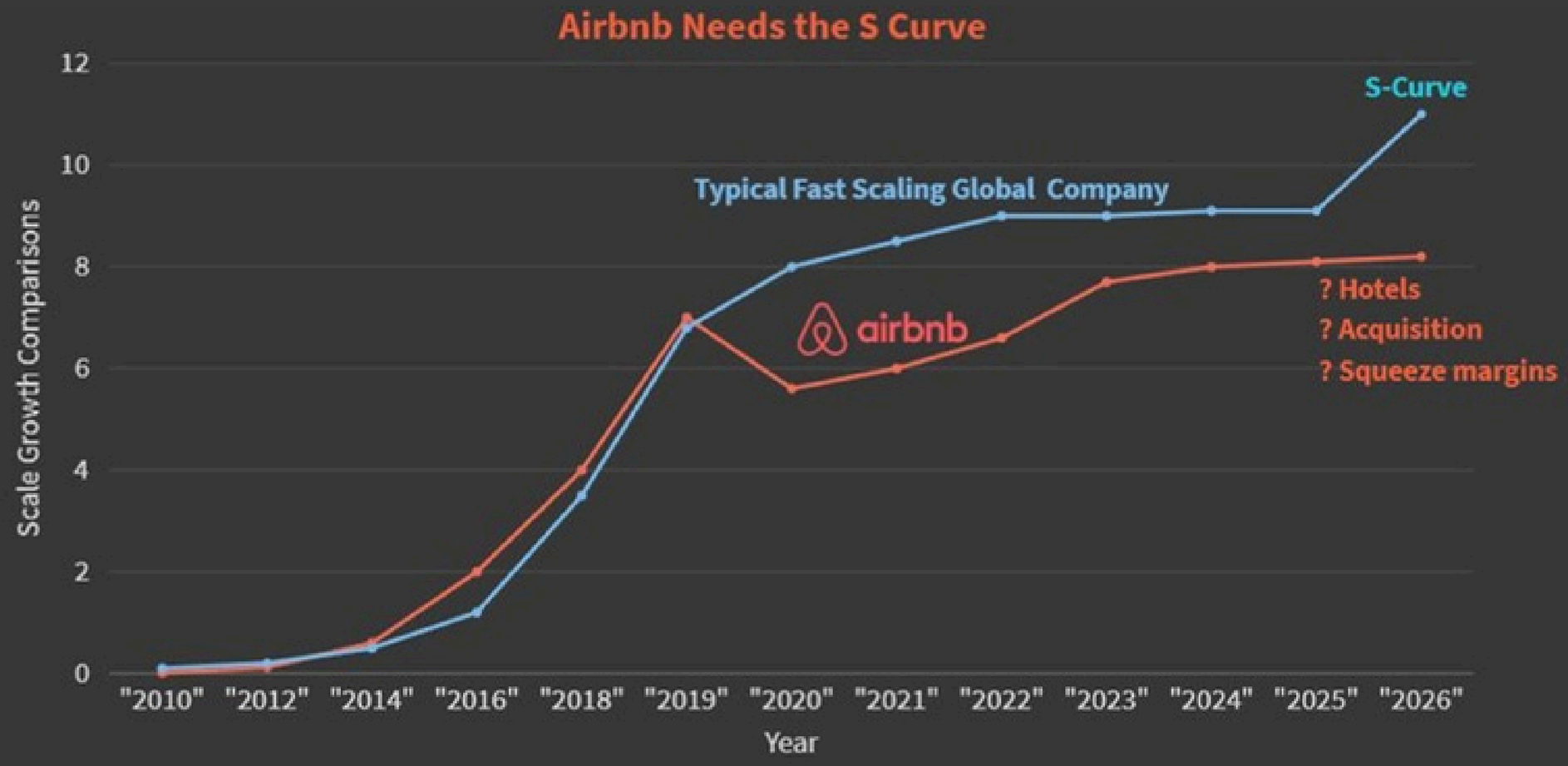
SOME TECH CO'S ARE TARGETING YOU



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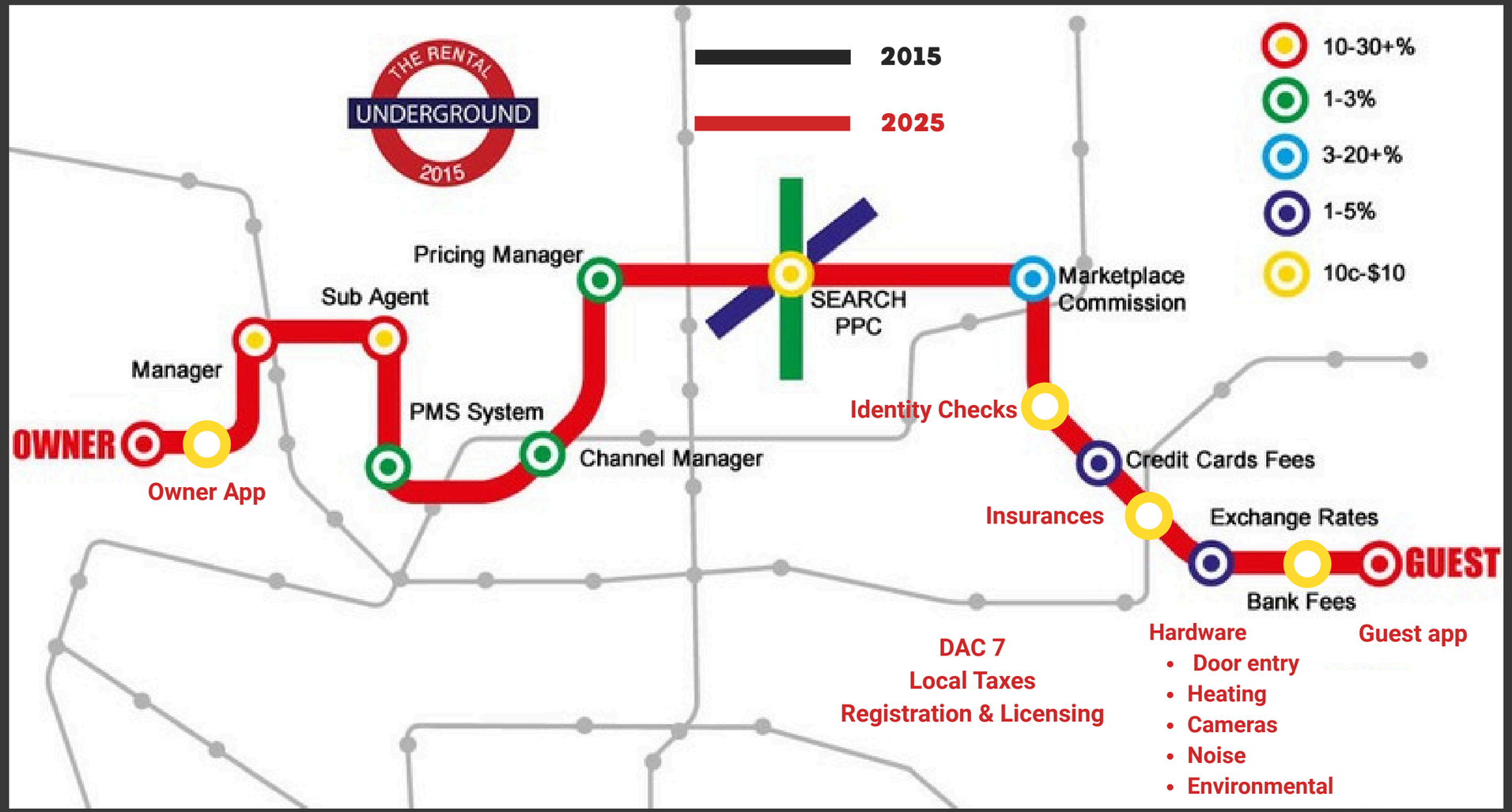
2015 – 2025 TECH EXPLOSION



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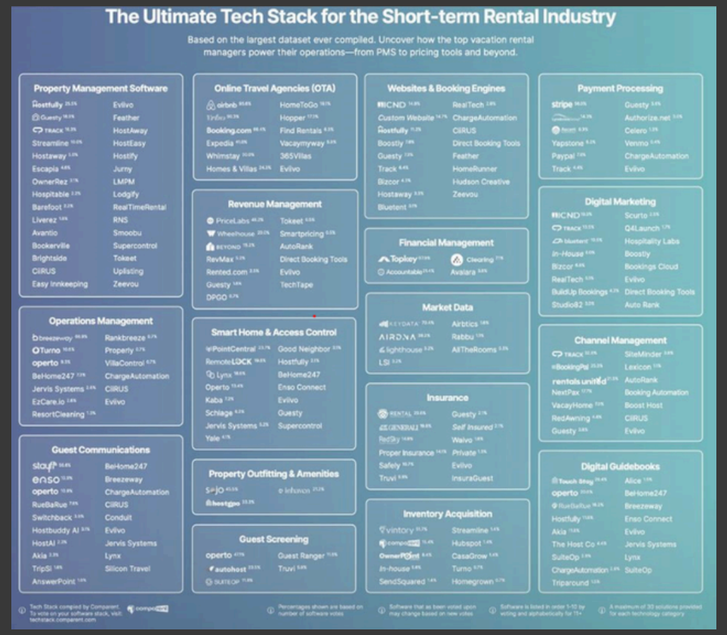
TECHNOLOGY OVERSUPPLY



Over 600 PMS systems across STR & Hotels

Over 1,500 Software Systems

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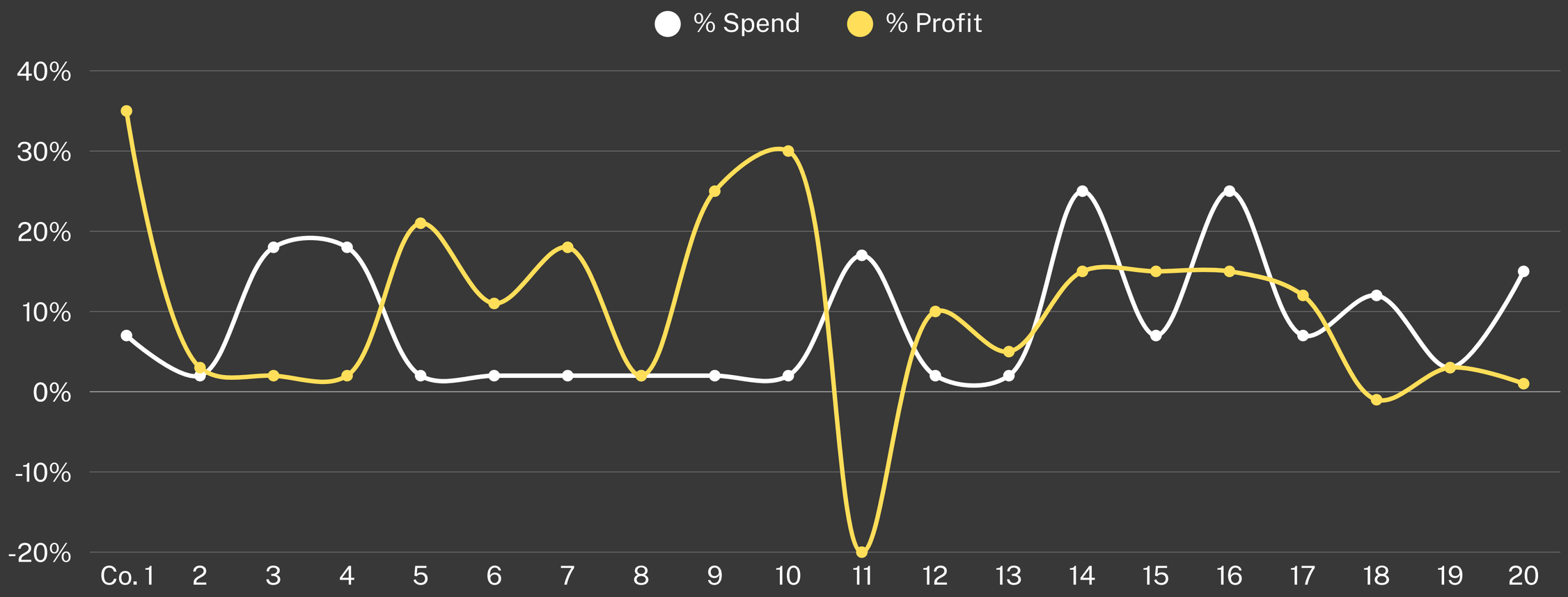
TECHNOLOGY SPEND AS A % OF COMPANY INCOME

All models. excl devs but incl admin

50 - 300 Properties – EU average is 70



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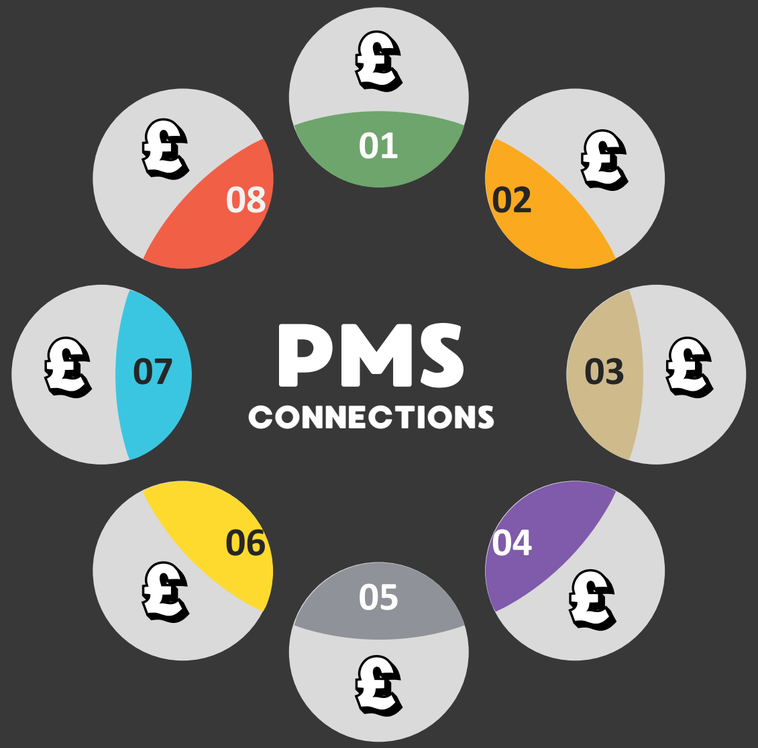
COSTS ARE INCREASING

Payment Solutions
Credit and debit cards rule the booking flows and transaction management.

Automation Tools
For communication, guest information, email/whatsapp and voice comms

Websites
Book Direct and for guest information and referral business

Distribution
Few companies can live without distribution and the increasing dependence by guests on the three big Co's



Guest Apps
For information, chat, rebooking, local information etc

Pricing & Data Tools
Dynamic pricing and revenue management tools for local and national data.

Operational Software
For cleaning and maintenance scheduling, costs controls and statistics

Insurances/Checkins etc
Third party tools that are guest orientated for ease of travel, and financial reporting

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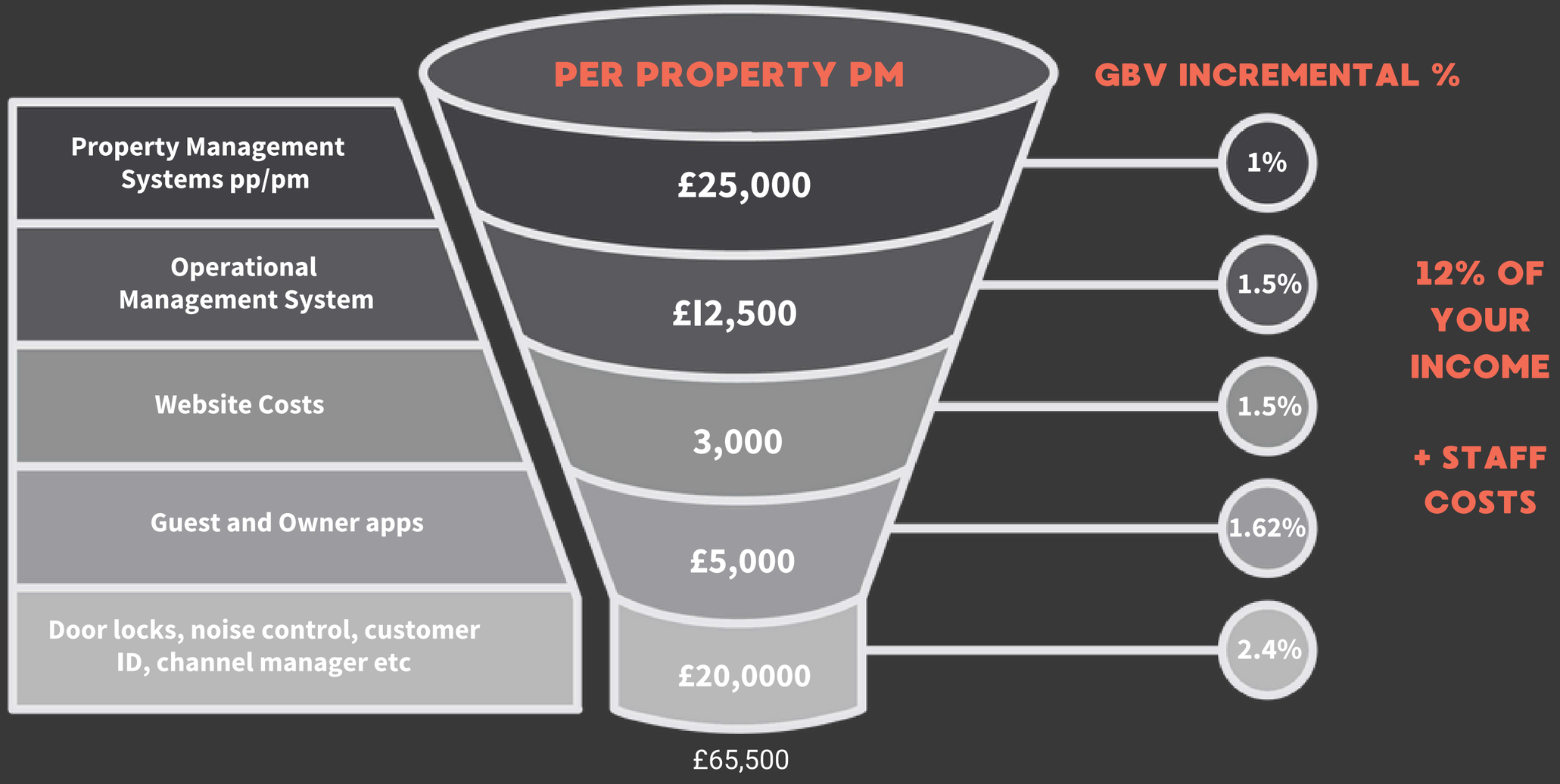
TECHNOLOGY BLOAT (£)



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YOUR VALUE AT RISK

GBV	£2.5m
Commission	£500k
COSTS	
• GENERAL	£250k
• TECH	£60k
EBITDA	£190k
X5 =	£950K

GBV	£2.5m
Commission	£500k
COSTS	
• GENERAL	£220k*
• TECH	£30k
EBITDA	£190k
X5 =	£1.25m

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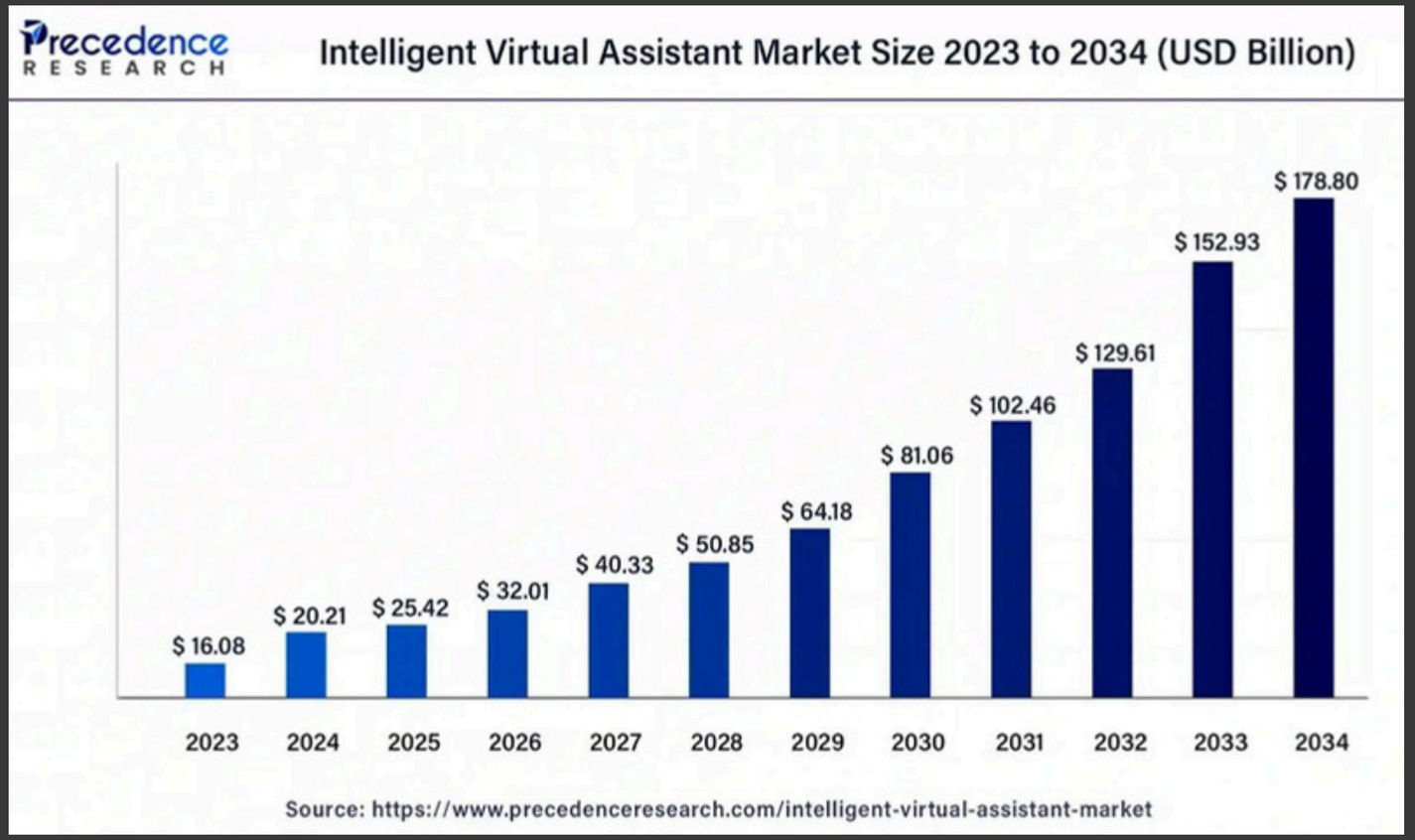
*30K staff saving

THE FUTURE?

VA'S AND IVA'S



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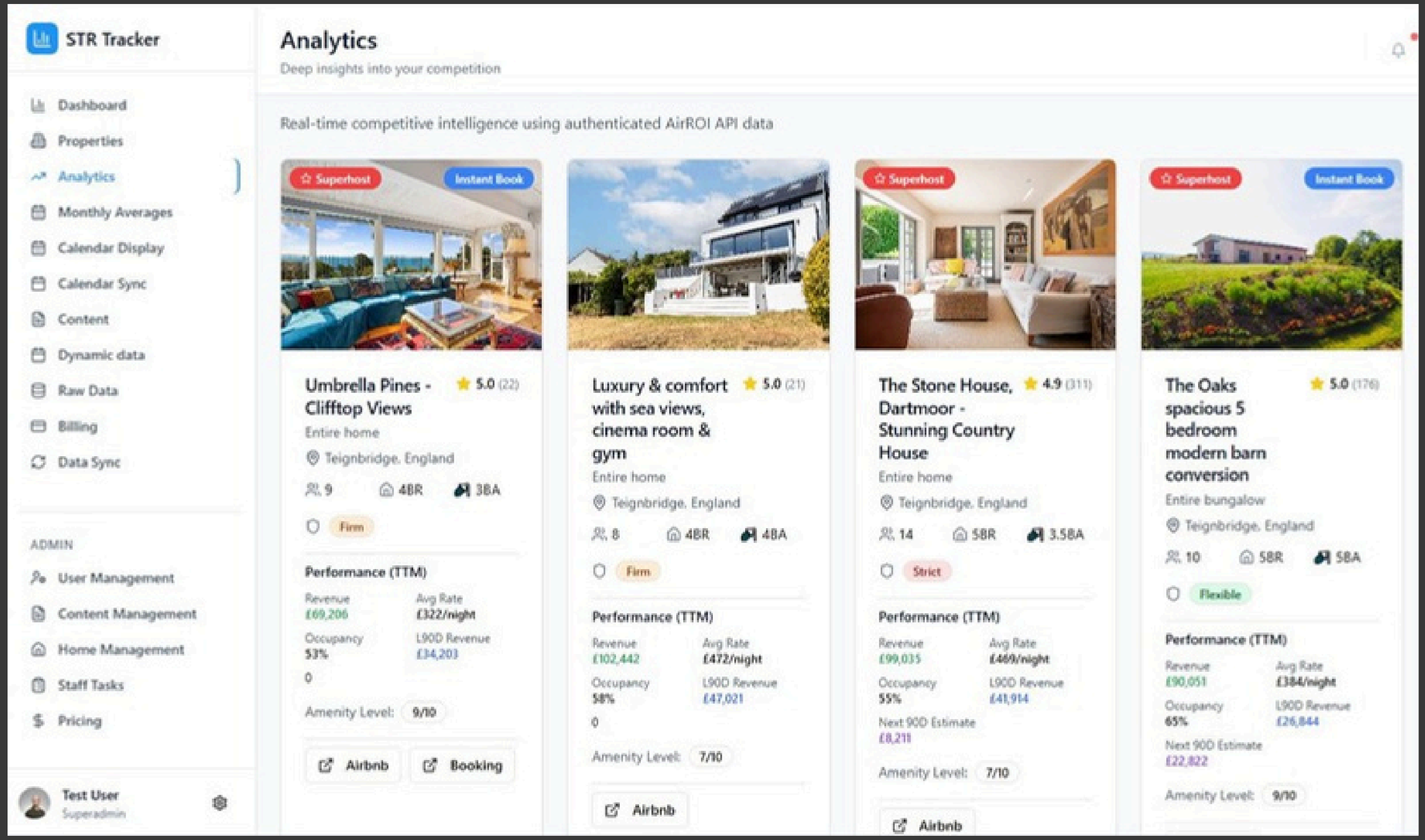
EASY MODELLING



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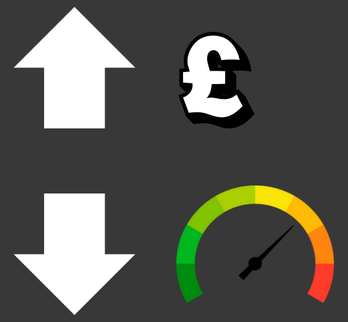
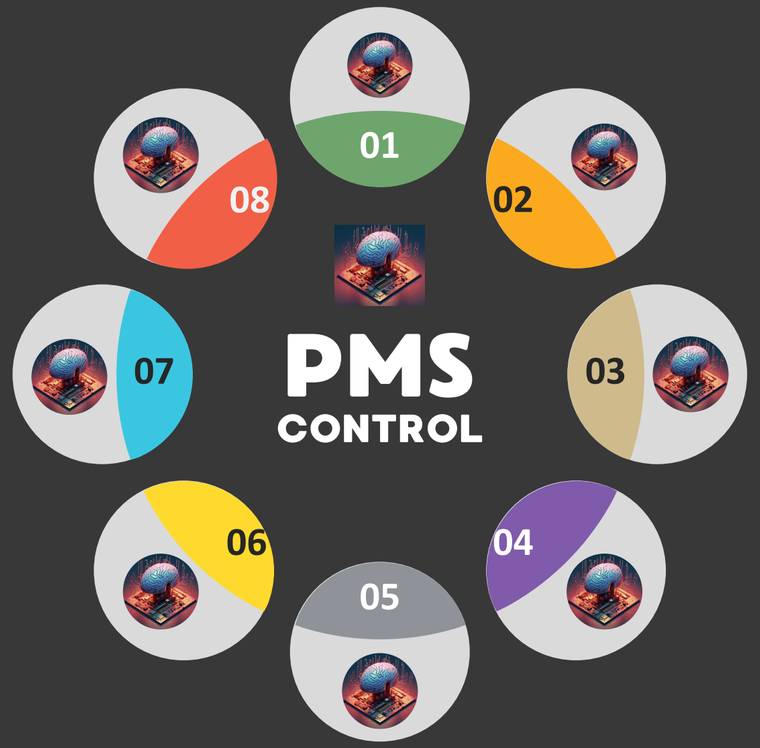
COMPOUND SYSTEMS = ARE AI FLUENT





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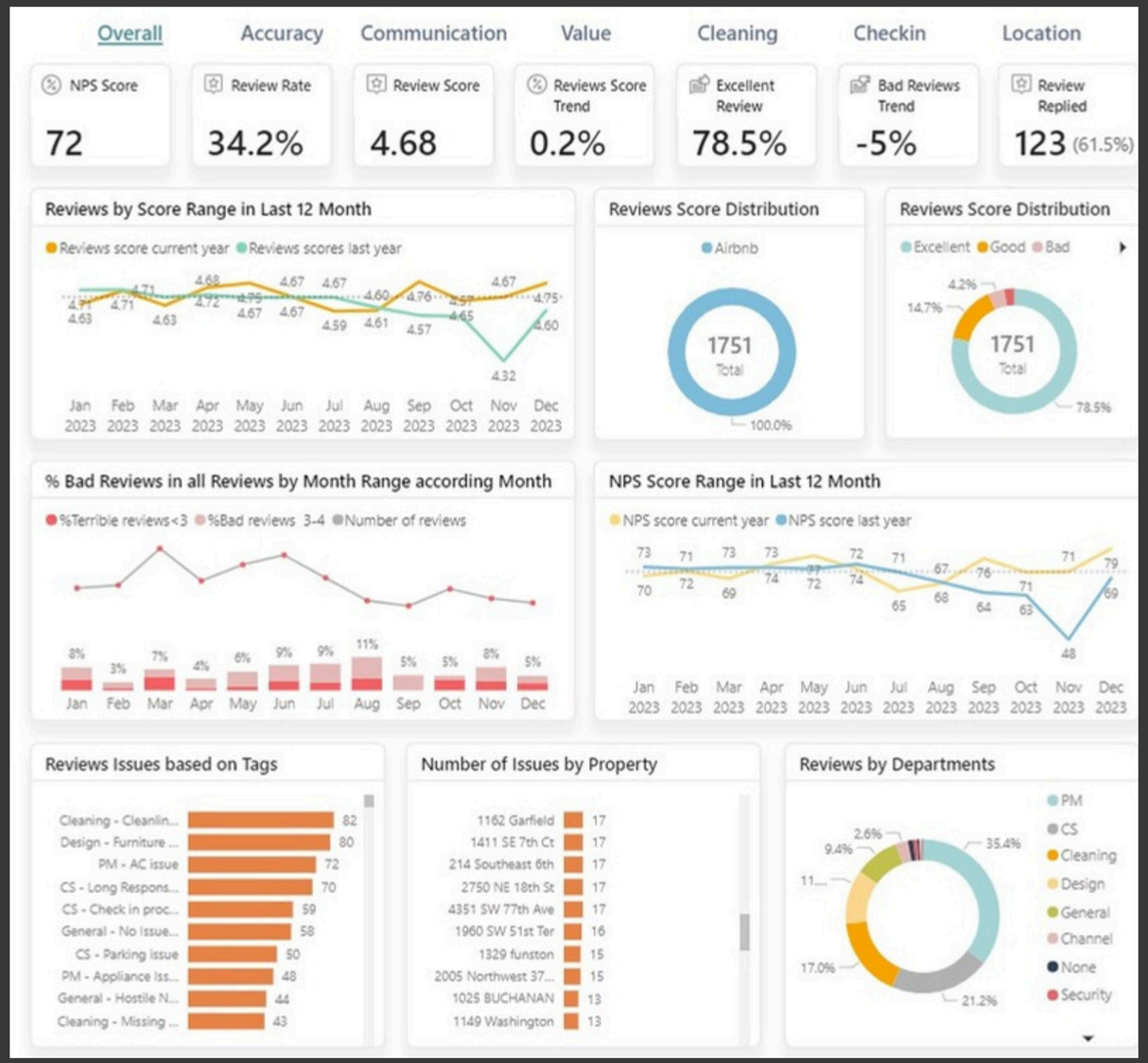
BUSINESS INTELLIGENCE

YOUR DAILY DASHBOARD



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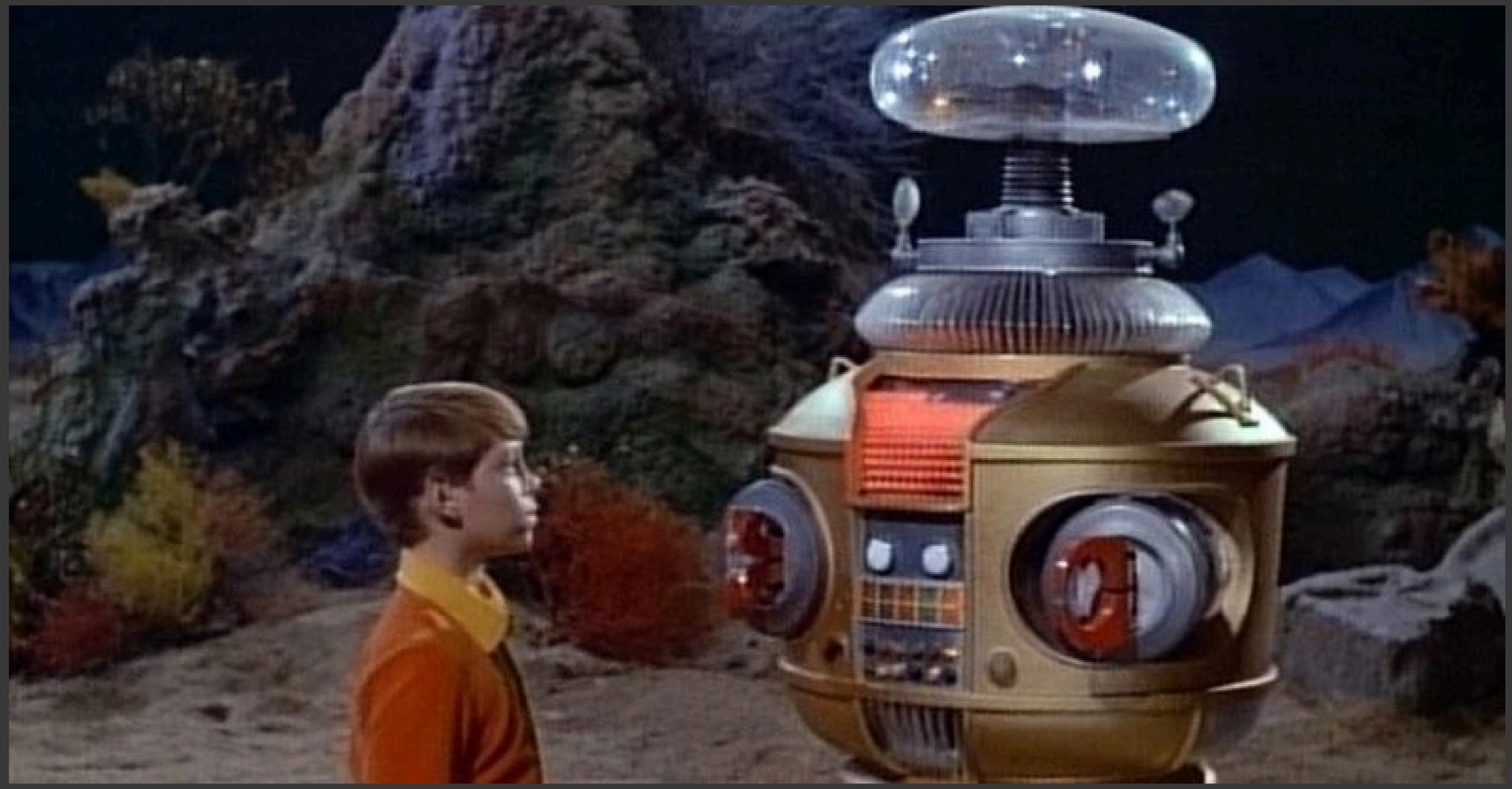
LOST IN SPACE?



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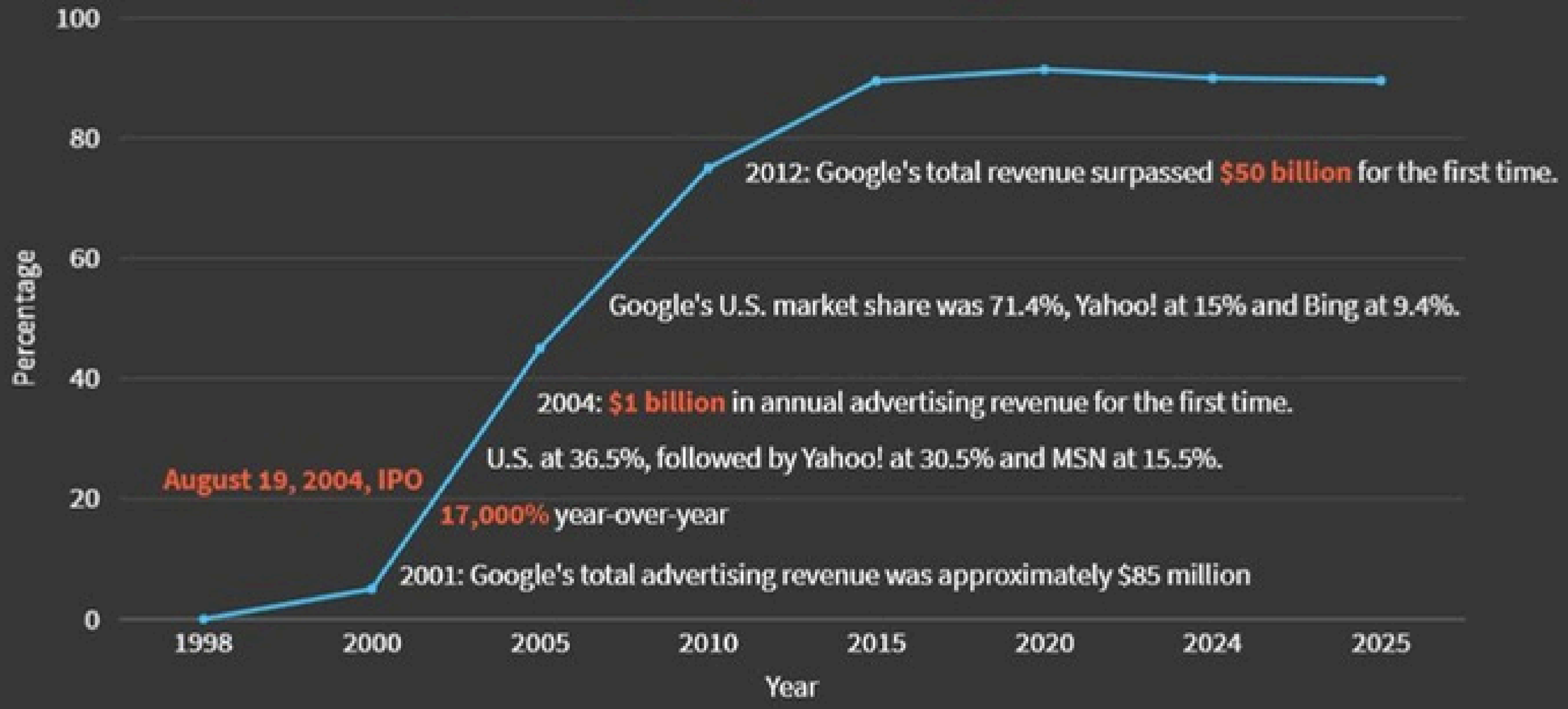
GOOGLE SEARCH HISTORY

$10-15bn spent by OTAs on Google



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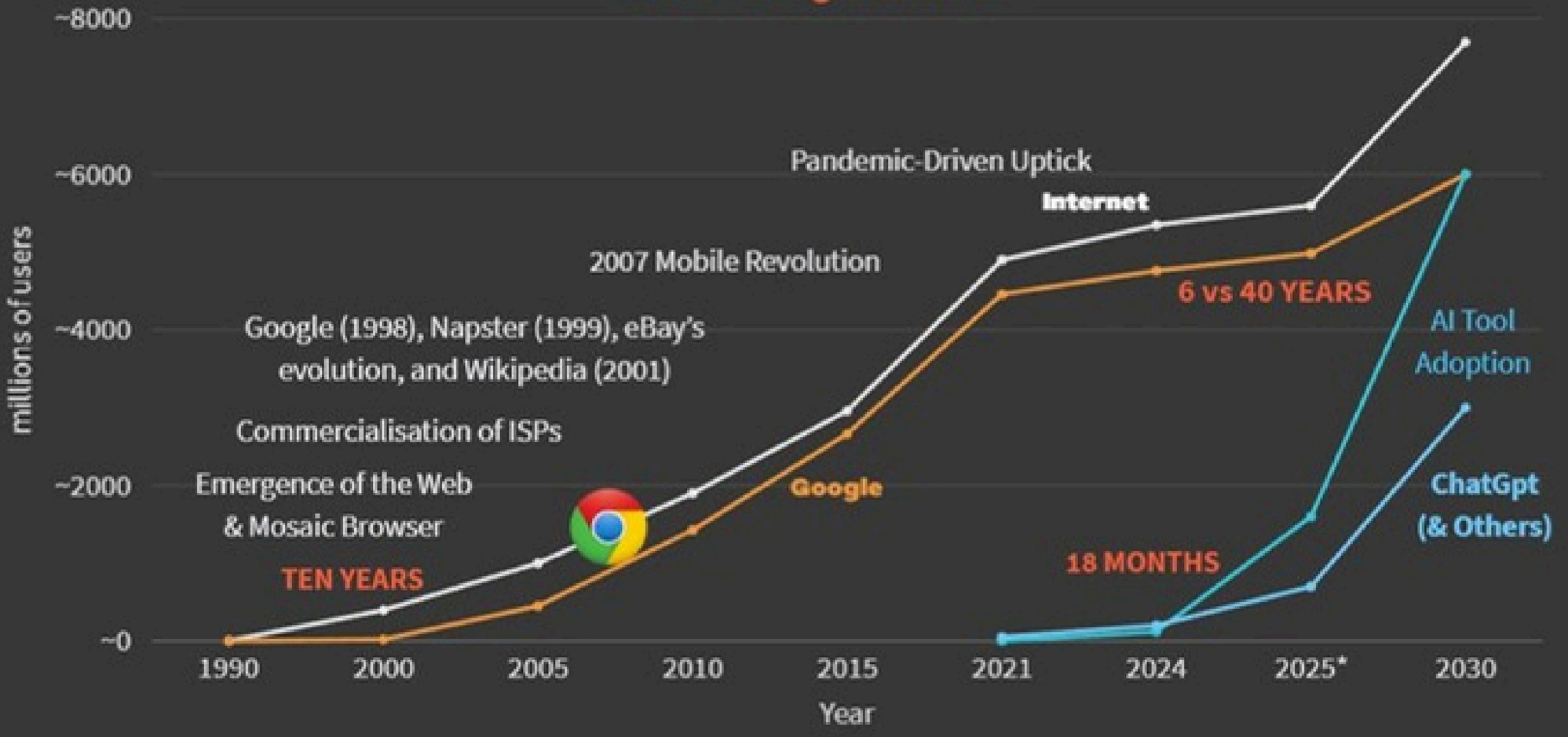
NEW PARADIGM

Fast Moving. Act Now



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LOOKING AHEAD

In early 2025 Google delivered around 9.5 billion visits. 3.5bn use a Chrome browser & 2 Trillion searches annually that's over 60% of Internet users.

By 2030 (in < 5years) we could see 50-60% using AI search

Travellers stay 8% longer, view 12% more pages, and bounce 23% less

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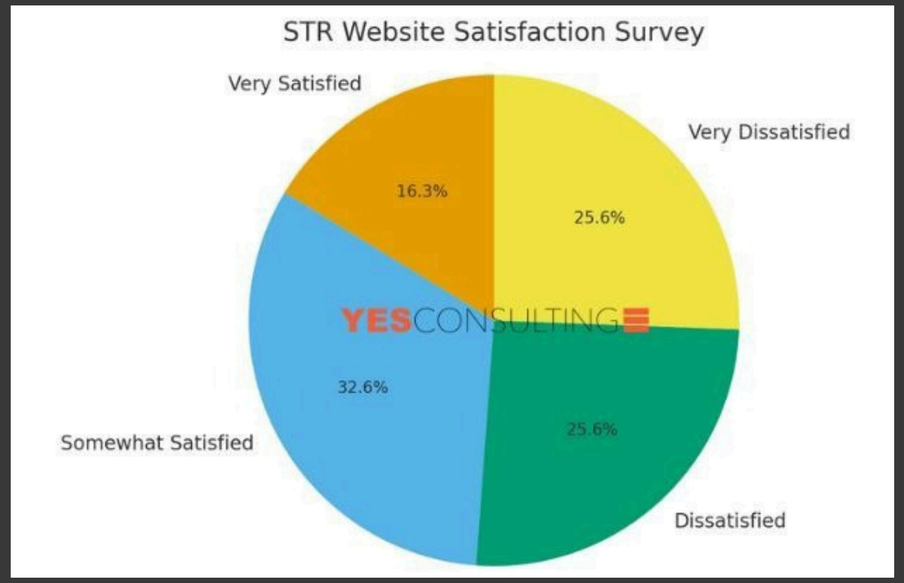
LLM SEARCH

"I'm looking to stay in a Villa in Playa Blanca for me and my family (me, my wife and two young children). We would like to go in September and are looking for some websites I can review and ideally get the best price! Can you help?"

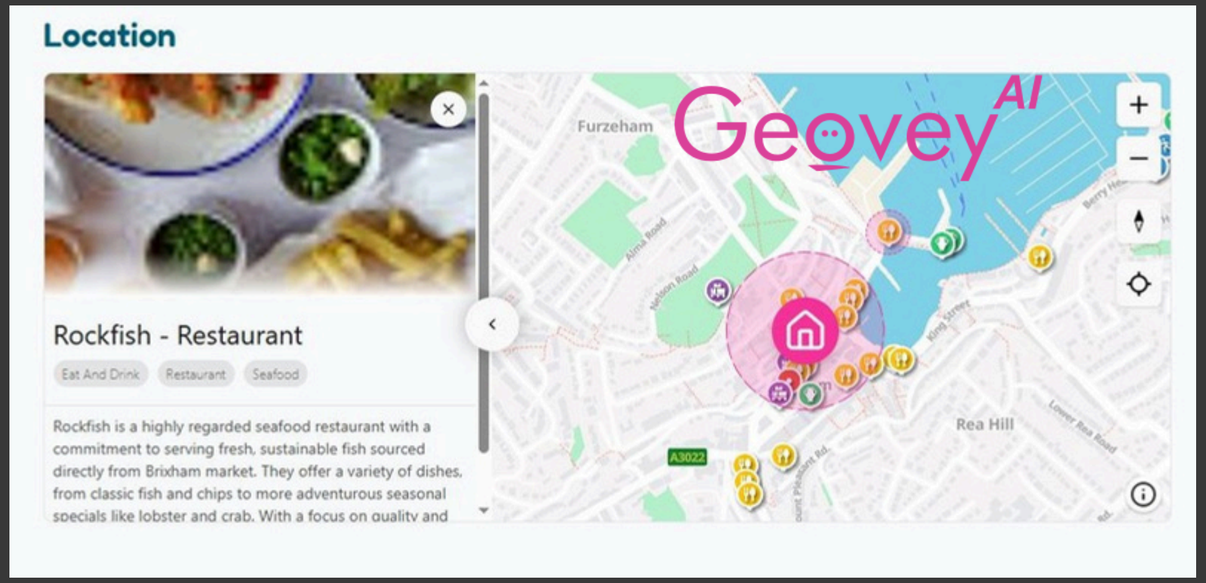
- **SimplyOwners** (owner-direct, no guest booking fees) – Playa Blanca page with verified owners and payment protection. Great for messaging owners and agreeing a direct price. Simply Owners
- **Optima Villas** (Playa Blanca specialists) – local agency with wide coverage across Costa Papagayo, Marina Rubicón, Faro Park, Montaña Roja, etc. Booking direct avoids OTA mark-ups. optimavillaslanzarote.com
- **Villas Now** – long-running Playa Blanca agency; lots of family villas with private pools. Villa Snow
- **Lanzarote Villa Choice** – curated Playa Blanca inventory; family extras like cots/high-chairs. Lanzarote Villa Choice
- **Kamezí Boutique Villas** – upscale, hotel-serviced villas on the seafront; best rates direct. villaskamezi.com
- **Sun Grove Villas** – small cluster of family villas with private pools; book on their own site. Sun Grove Villas+1

DIRECT BOOKINGS

GEO FOR AGENTIC SYSTEMS



Poor Websites



Hyper local information needed

Dalton

A/B testing made simple!

hostAI

CraftedStays

FLATAWAY

Websites with brains!

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DATA IS AT THE HEART OF BUSINESS

AIRDNA

lighthouse

KEYDATA™

Wheelhouse

PriceLabs

BEYOND

BUT NEEDS TO ADD VALUE

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FRIEND OR FOE?

CHOOSE YOUR SOFTWARE PARTNERS CAREFULLY.

1. Market and Strategic Misalignment

A primary driver of software failure is the inability of management to align product value with market needs.

2.Technical Debt and Inertia

Organizational neglect of legacy systems poses a significant, quantifiable risk. Technical obsolescence is rapid, with 62% of IT leaders reporting that at least one major platform reaches its end-of-life within eight years.

3. Execution and Incomplete Product Syndrome

A common failure pattern in technically driven firms is the "Incomplete Product." Engineers and scientists who run high-tech companies often prioritize complex technical features and specifications. However, most customers view the product holistically, placing greater value on factors such as product support, company reputation, and ease of use.

4. Runway and Longevity

Check their financials and direction.

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THANKS FOR LISTENING

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