European Hotel Distribution Study

Results for the Reference Year 2017

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Executive Summary

Evolutions in the distribution market between 2013 and 2017

- This years' distribution study of HOTREC shows, that between 2013 and 2017 the dependency of hotels on Online Travel Agencies (OTA) was rising and the share of direct bookings was declining.
- The share of direct bookings has decreased across Europe by over 4 percentage points from 57,6% in 2013 to 52% in 2017 (weighted results including data from hotel chains).
- The share of OTAs in hotel room bookings increased by over 6% points, i.e. from 19,7% to 26%, over the last 4 years.

Executive Summary

Dependency on Online Travel Agents

- The study shows that especially the small hotel segments (with less than 20 rooms) are significantly more dependent on OTAs (29,3%) than the average hotel.
- Hotel cooperations are significantly less dependent on OTAs (22,5%) than the average of all hotels.
- Yet, the dependency increased between 2013 and 2017 both in the case of smaller hotels and bigger hotels, as well as in the case of individual and branded hotels.

Executive Summary

Who dominates the Online Travel Agent market?

- The 3 main market players within the OTA market remain Booking Holding (Booking.com), Expedia Group and to a lesser extent HRS, with an aggregated market share of 92%.
- These 3 players could maintain their overall market share over the past 2 years.
- Booking.com is by far the most influential OTA, with a share of 66,4%. The dominance of Booking.com has been rising over the last 4 years by more than 6% between 2013 and 2017 (i.e. from 60% to 66,4%).
- Expedia could maintain its 2015 market share (16,6% in 2017 compared with 16,8% in 2015), while HRS lost market shares and ranks third in the OTA market with a relative share of 9% in 2017 compared to 16,6% back in 2013.

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The OTA – hotel relationship

- Regarding some aspects of the relations with OTAs, the majority of hoteliers (50%) feels pressured by OTAs to accept platforms terms and conditions (e.g. regarding cancellation policy, special discounts) that hotels would otherwise voluntarily not offer. Small and independent hotels feel more pressured than big hotels or hotel chains.
- When having disputes with OTAs (6 out of 10 hotels!), the majority of concerned hotels (70%) consider that there is not a fair and effective solution to the disagreements. Again, small and independent hotels seem to have more problems with dispute resolution than bigger hotels or hotel chains.

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The survey

The survey: background

- In order to monitor the current situation of distribution (online as well as offline) within the European hotel industry, especially in relation to the role of online travel agencies (OTA), **HOTREC**, the umbrella association of Hotels, Restaurants and Cafés in Europe, has decided to conduct an online survey between February and March 2018 **together with hotel associations from HOTREC member countries across Europe for the reference year 2017**.
- Similar studies have been conducted in 2014 for the **reference year 2013** and in 2016 for the **reference year 2015.** The present study allows therefore to illustrate the evolution of distribution channels and players between 2013, 2015 and 2017.

The questionnaire

- The online questionnaire asked for market shares of different direct and indirect distribution channels (in terms of **overnights**) as well as the specific market shares of the OTAs (such as Booking.com, Expedia, and HRS).
- Further questions queried the hotel-OTA relationship.
- The final part comprises questions covering characteristics of the hotel property (star rating, the size of the hotel in terms of rooms offered, amount of overnight stays, its location, main target group, etc.)

The survey administration

- The questionnaire was translated in more than 20 languages with the help of the respective national hotel associations.
- The survey was addressed to the member hotels of the different hotel associations and **conducted between February and March 2018**. The collected data cover the **reference year 2017**.
- The different hotel associations contacted their members either by email or through newsletters.
- In addition to information of individual hotel owners, **data from hotel chains** could be integrated, either on an **aggregated level (country)** or a **property-level**.

Methodological remarks: sampling

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- Overall **2'744 responses** from individual hotels could be collected through the online survey. Yet response rates by country vary strongly in the survey (see following slide).
- **Data from 2 hotel chains** allowed to integrate further **18 responses** on a property-level for 5 countries leading to an overall sample size of **2'762 valid observations**. For five countries, **aggregated data for distribution channels and OTA market shares** from **6 hotel chains comprising 650 hotels** with 101'981 rooms could be integrated into the analysis:
  - Germany: 3 chains with 456 hotels
  - Data from one chain in Finland, Hungary, Norway and Sweden
- The study is therefore based on observations from a total of **3'412 European hotels**.

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Methodological remarks: confidence intervals

- As not all hotels have answered all the questions, the **indicated total number of observations changes from one question to another**.
- **Measure of accuracy**
  - A **confidence interval gives an estimated range of values which is likely to include an unknown population parameter**, the estimated range being calculated from a given set of sample data. (Definition from Valerie J. Easton and John H. McColl's Statistics Glossary v1.1). -> A confidence interval tell you the most likely range of the unknown population average.
  - We used the **bootstrap** approach with a **95% confidence interval**: This gives the **probability** that the interval produced by the bootstrap method includes the true value of the parameter in the population.
  - We used: Wessa P., (2015), Bootstrap Plot for Central Tendency (v1.0.14) in Free Statistics Software (v1.1.23-r7), Office for Research Development and Education, URL http://www.wessa.net/rwasp_bootstrapplot1.wasp/

Methodological remarks: weighted average Europe

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- **Estimations of market shares on an European level**
  - ✓ In addition to the average values calculated on overall sample statistics, an estimation of market shares based on a **weighted average value** on an European level is given.
  - ✓ A weighted average is the summation of variables (country-specific averages), each of which are multiplied by their relative weight.
  - ✓ This approach means that the overall European estimate compensates the effect of countries having a very high number of observations within the sample.
  - ✓ The relative weights in our case are the respective **overnights** for each country in the sample. Country-specific weighting factors for 12 countries with sufficient observations in the survey (n>70) have been used.
  - ✓ For **countries with insufficient number of observations** and hence limited validity of country-specific estimates, the **overall sample mean** is used.

Methodological remarks: weighted average country-level

- Estimations of market shares in countries where **aggregated data from hotel chains** are available are based on a weighted average.
- The weighting takes into account the market shares (in terms of **number of rooms**) of individual hotels versus branded hotels in the country. Information from the hotel associations resp. hotel chains are used in this context.
- The following figures are used in our study:
  - Germany: indiv. Hotels 55% / branded hotels 45%
  - Hungary: indiv. Hotels 67% / branded hotels 33%
  - Finland: indiv. Hotels 61,2 % / branded hotels 38,8%
  - Norway: indiv. Hotels 20,5% / branded hotels 79,5%
  - Sweden: indiv. Hotels 56% / branded hotels 44%

Summary of sample characteristics (Europe)

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- Overall, the following main observations can be made with regard to the sample characteristics (further details are in annex 2):
  - Hotel Classification – 75,5% of properties in the sample are classified. 3 star (43,5%) and 4 star (33,8%) hotels make up the large majority of the classified hotels in the sample.
  - Size – The average size of the hotels in the sample is 38 rooms (median value), yet one hotel out of four has less than 20 rooms.
  - Customer segment – The leisure segment is the dominant target group for 57,6% of hotels, followed by business clients for 34,9% of properties
  - Management – Nearly 70% of hotels are individual properties whereas 19,8% belong to a hotel chain and 10,4% to a hotel cooperation.

Distribution channels

Market shares of distribution channels in Europe 2017: overall sample

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Unweighted overall sample (2'593 valid observations for the distribution channels)	Market share 2017		confidence interval (bootstrap)	
Direct - Phone	18.5	55.1	18.0	19.0
Direct - Mail / fax	2.0		1.8	2.1
Direct - Walk-In (persons without reservation)	4.4		4.2	4.6
Direct - Contact form on own website (without availabilty check)	6.0		5.6	6.3
Direct - Email	16.0		15.5	16.7
Direct - real time booking over own website with availabilty check	8.2		7.9	8.6
Destination Marketing Organization (DMO) / trade associations	0.9	1.3	0.5	1.3
National Tourism Organization (NTO)	0.5		0.2	0.8
Tour operator / Travel agency	7.8	12.7	7.3	8.3
Hotel chains and cooperations with CRS	1.0		0.6	1.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.9		1.5	2.3
Event and Congress organizer	1.9		1.6	2.3
Online Booking Agency (OTA)	26.9	29.3	26.1	27.8
Globale Distributionssysteme (GDS)	1.9		1.4	2.4
Social Media Channels	0.5		0.2	0.8
other distribution channels	1.6	1.6	1.1	2.1

Confidence intervals are stated at the 95% level. Market shares in % of overnights.

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Evolution market shares of distribution channels in Europe 2013 to 2017: overall sample

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	Market share 2017 (n=2'593)		Market share 2015 (n=2'188)		Market share 2013 (n=2'221)		*DELTA (2017-2013)*	
Direct - Phone	18.5	55.1	18.7	55.2	21.1	59.4	*-2.5*	*-4.2*
Direct - Mail / fax	2.0		2.3		3.1		*-0.9*	
Direct - Walk-In (persons without reservation)	4.4		4.8		6.0		*-1.2*	
Direct - Contact form on own website (without availabilty check)	6.0		6.1		6.1		*0.0*	
Direct - Email	16.0		16.7		16.1		*0.5*	
Direct - real time booking over own website with availabilty check	8.2		6.8		6.9		*-0.2*	
Destination Marketing Organization (DMO) / trade associations	0.9	1.3	0.9	1.4	1.0	1.7	*-0.2*	*-0.2*
National Tourism Organization (NTO)	0.5		0.6		0.6		*-0.1*	
Tour operator / Travel agency	7.8	12.7	8.0	16.3	9.6	15.7	*-1.6*	*0.6*
Hotel chains and cooperations with CRS	1.0		2.6		1.4		*1.2*	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.9		2.6		2.8		*-0.2*	
Event and Congress organizer	1.9		3.1		1.9		*1.2*	
Online Booking Agency (OTA)	26.9	29.3	22.3	25.5	19.3	21.8	***3.0***	*3.7*
Globale Distribution Systems (GDS)	1.9		2.7		2.0		*0.7*	
Social Media Channels	0.5		0.5		0.5		*0.0*	
Other distribution channels	1.6	1.6	1.5	1.5	1.5	1.5	*0.0*	*0.0*

Market shares in % of overnights.

Market shares of distribution channels in Europe 2017: weighted values

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	Rest Europe	Czech Republic	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Spain	Sweden	Switzerland	Weighted Values 2017		Un-weighted Values 2017	
weighting	*29.4%*	*1.9%*	*0.9%*	*10.5%*	*14.3%*	*4.1%*	*1.2%*	*13.7%*	*2.3%*	*1.2%*	*17.0%*	*1.8%*	*1.8%*				
Direct - Phone	15.4	15.1	28.6	26.3	20.8	17.6	9.2	18.1	12.4	11.8	7.9	16.5	18.3	**16.5**	**52.0**	18.5	**55.1**
Direct - Mail / fax	3.3	0.6	0.2	1.6	2.1	0.9	0.5	1.4	6.0	1.8	1.3	0.2	1.7	**2.1**		2.0	
Direct - Walk-In (persons without reservation)	4.4	4.3	4.0	8.5	3.7	5.6	3.4	4.3	2.7	2.8	3.2	3.5	5.1	**4.5**		4.4	
Direct - Contact form on own website (without availabilty check)	4.6	9.3	4.9	3.7	5.3	4.4	6.2	10.2	2.6	8.0	3.3	3.5	6.9	**5.3**		6.0	
Direct - Email	14.6	18.8	15.7	10.3	18.0	8.4	15.5	24.7	11.7	20.0	6.4	19.0	18.9	**14.6**		16.0	
Direct - real time booking over own website with availabilty check	8.1	8.2	11.6	12.5	10.9	6.5	5.8	5.5	10.5	13.2	9.9	12.0	8.2	**9.0**		8.2	
Destination Marketing Organization (DMO) / trade associations	0.7	0.3	0.5	0.7	0.4	0.1	0.2	1.9	0.5	0.3	1.3	0.8	1.4	**0.9**	**1.3**	0.9	**1.3**
National Tourism Organization (NTO)	0.4	0.1	0.0	0.4	0.2	0.2	0.7	1.0	0.1	0.0	0.1	0.1	1.1	**0.4**		0.5	
Tour operator / Travel agency	10.7	10.0	4.5	3.8	2.7	25.5	13.7	8.1	3.2	12.7	15.3	7.2	3.8	**9.5**	**16.3**	7.8	**12.7**
Hotel chains and cooperations with CRS	0.9	0.6	1.6	2.5	0.4	0.0	0.6	0.2	0.4	0.1	2.2	1.3	0.6	**1.1**		1.0	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.0	1.6	1.1	1.1	1.0	3.1	2.9	1.2	0.9	1.1	7.8	0.4	0.7	**3.2**		1.9	
Event and Congress organizer	3.2	3.2	2.3	1.9	1.8	0.4	3.4	0.6	0.9	1.8	5.1	1.6	1.3	**2.6**		1.9	
Online Booking Agency (OTA)	25.7	25.6	18.2	22.4	27.8	23.6	32.3	20.3	44.8	15.8	30.8	24.7	27.7	**26.0**	**29.0**	26.9	**29.3**
Globale Distributionssysteme (GDS)	2.2	1.2	3.3	2.0	3.4	0.8	1.1	0.3	1.8	9.5	4.2	7.8	1.1	**2.5**		1.9	
Social Media Channels	0.5	0.8	0.5	0.3	0.3	1.1	0.4	0.9	0.6	0.1	0.2	0.5	0.2	**0.5**		0.5	
other distribution channels	1.3	0.5	2.9	2.2	1.1	2.0	4.1	1.5	1.1	1.0	1.1	0.9	2.9	**1.4**	**1.4**	1.6	**1.6**

Market shares in % of overnights.

Evolution of market shares of distribution channels in Europe 2013 - 2017: weighted samples

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	Weighted market share 2017		Weighted market share 2015		Weighted market share 2013		DELTA (2017-2013)	
Direct - Phone	16.5	52.0	17.2	52.9	20.5	57.6	-4.0	-5.60
Direct - Mail / fax	2.1		2.4		3.2		-1.1	
Direct - Walk-In (persons without reservation)	4.5		4.5		5.8		-1.3	
Direct - Contact form on own website (without availabilty check)	5.3		5.4		5.8		-0.5	
Direct - Email	14.6		15.6		14.9		-0.3	
Direct - real time booking over own website with availabilty check	9.0		7.7		7.4		1.6	
Destination Marketing Organization (DMO) / trade associations	0.9	1.3	0.9	1.4	1.1	1.6	-0.2	-0.3
National Tourism Organization (NTO)	0.4		0.5		0.5		-0.1	
Tour operator / Travel agency	9.5	16.3	9.1	17.9	10.3	17.2	-0.8	-0.9
Hotel chains and cooperations with CRS	1.1		2.4		1.6		-0.5	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.2		3.5		3.4		-0.3	
Event and Congress organizer	2.6		2.9		1.8		0.7	
Online Booking Agency (OTA)	26.0	29.0	23.1	26.4	19.7	22.2	**6.3**	6.8
Globale Distributionssysteme (GDS)	2.5		2.9		2.0		0.5	
Social Media Channels	0.5		0.4		0.4		0.0	
other distribution channels	1.4	1.4	1.4	1.4	1.5	1.5	-0.1	-0.1

Market shares in % of overnights.

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Distribution channels for selected countries (n>50)

- Czech Republic
- Finland
- France
- Germany
- Greece
- Hungary
- Italy
- Netherlands
- Norway
- Spain
- Sweden
- Switzerland

Market shares of distribution channels 2017: Czech Republic

Unweighted sample: n=65	Market share		confidence interval (bootstrap)	
Direct - Phone	15.1	56.3	12.2	19.3
Direct - Mail / fax	0.6		0.4	0.8
Direct - Walk-In (persons without reservation)	4.3		3.5	5.1
Direct - Contact form on own website (without availability check)	9.3		5.9	12.6
Direct - Email	18.8		15.6	22.3
Direct - real time booking over own website with availability check	8.2		6.2	10.3
Destination Marketing Organization (DMO) / trade associations	0.3	0.3	0.1	0.5
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	10.0	15.4	6.5	13.6
Hotel chains and cooperations with CRS	0.6		0.4	0.8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		1.2	2.0
Event and Congress organizer	3.2		2.6	3.8
Online Booking Agency (OTA)	25.6	27.5	21.0	30.0
Globale Distributionssysteme (GDS)	1.2		0.8	1.6
Social Media Channels	0.8		0.4	1.2
other distribution channels	0.5	0.5	0.3	0.8

Market shares in % of overnights.

Market shares of distribution channels in Czech Republic: 2013 to 2017

	Market share 2017 (n=65)		Market share 2015 (n=52)		Market share 2013 (n=82)		DELTA (2017-2013)	
Direct - Phone	15.1	56.3	12.1	53.4	17.4	58.0	-2.28	-1.65
Direct - Mail / fax	0.6		0.8		0.9		-0.31	
Direct - Walk-In (persons without reservation)	4.3		5.2		6.1		-1.79	
Direct - Contact form on own website (without availabilty check)	9.3		8.1		8.3		1.01	
Direct - Email	18.8		22.2		18.8		0.01	
Direct - real time booking over own website with availabilty check	8.2		5.0		6.5		1.71	
Destination Marketing Organization (DMO) / trade associations	0.3	0.3	0.3	0.7	0.8	0.9	-0.48	-0.52
National Tourism Organization (NTO)	0.1		0.4		0.1		-0.04	
Tour operator / Travel agency	10.0	15.4	13.1	19.0	12.7	19.9	-2.67	-4.51
Hotel chains and cooperations with CRS	0.6		0.3		1.7		-1.06	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		2.0		2.0		-0.44	
Event and Congress organizer	3.2		3.6		3.6		-0.34	
Online Booking Agency (OTA)	25.6	27.5	23.7	25.6	18.1	19.6	**7.46**	7.91
Globale Distributionssysteme (GDS)	1.2		1.6		1.1		0.06	
Social Media Channels	0.8		0.3		0.4		0.39	
other distribution channels	0.5	0.5	1.4	1.4	1.7	1.7	-1.24	-1.24

Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels 2017: Finland

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Unweighted sample: n=109	Market share		confidence interval (bootstrap)	
Direct - Phone	28.8	62.9	25.3	32.1
Direct - Mail / fax	0.2		0.0	0.4
Direct - Walk-In (persons without reservation)	4.3		3.7	5.0
Direct - Contact form on own website (without availability check)	5.7		4.2	7.4
Direct - Email	14.7		12.2	16.6
Direct - real time booking over own website with availability check	9.1		7.4	10.8
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.3	0.9
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	5.5	10.8	4.1	6.8
Hotel chains and cooperations with CRS	1.7		1.3	2.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		0.7	1.3
Event and Congress organizer	2.7		2.3	3.1
Online Booking Agency (OTA)	19.2	22.3	16.5	21,8
Globale Distributionssysteme (GDS)	2.6		2.2	3.0
Social Media Channels	0.5		0.2	0.8
other distribution channels	3.3	3.3	2.9	3.7

Market shares in % of overnights.

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Market shares of distribution channels in Finland: 2013 to 2017

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	Market share 2017 (n=109)		Market share 2015 (n=50)		Market share 2013 (n=66)		DELTA	
Direct - Phone	28.8	62.9	27.9	65.2	32.9	69.8	-4.01	-6.83
Direct - Mail / fax	0.2		0.6		1.0		-0.73	
Direct - Walk-In (persons without reservation)	4.3		4.9		5.0		-0.64	
Direct - Contact form on own website (without availabilty check)	5.7		6.4		5.9		-0.19	
Direct - Email	14.7		17.4		18.9		-4.18	
Direct - real time booking over own website with availabilty check	9.1		7.9		6.2		2.92	
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.6	0.9	2.3	2.5	-1.71	-1.84
National Tourism Organization (NTO)	0.1		0.3		0.2		-0.13	
Tour operator / Travel agency	5.5	10.8	5.3	13.6	5.7	12.8	-0.20	-2.00
Hotel chains and cooperations with CRS	1.7		3.1		1.3		0.36	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		1.6		2.9		-1.93	
Event and Congress organizer	2.7		3.5		2.9		-0.23	
Online Booking Agency (OTA)	19.2	22.3	16.2	18.4	11.1	13.2	**8.10**	9.14
Globale Distributionssysteme (GDS)	2.6		2.0		1.8		0.76	
Social Media Channels	0.5		0.2		0.3		0.28	
other distribution channels	3.3	3.3	2.0	2.0	1.8	1.8	1.53	1.53

Unweighted samples. Market shares in % of overnights.

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Weighted market shares of distribution channels 2017: Finland

	SME hotels 2017 (n=78)		Chain hotels 2017(n=38)		Weighted average	
weighting	61.2%		38.8%			
Direct - Phone	33.1	66.9	21.5	62.2	28.6	65.1
Direct - Mail / fax	0.3		0.1		0.2	
Direct - Walk-In (persons without reservation)	4.4		3.4		4.0	
Direct - Contact form on own website (without availabilty check)	6.5		2.5		4.9	
Direct - Email	15.5		16.1		15.7	
Direct - real time booking over own website with availabilty check	7.2		18.4		11.6	
Destination Marketing Organization (DMO) / trade associations	0.7	0.7	0.2	0.2	0.5	0.5
National Tourism Organization (NTO)	0.0		0.0		0.0	
Tour operator / Travel agency	4.7	8.3	4.1	11.6	4.5	9.6
Hotel chains and cooperations with CRS	0.0		4.2		1.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		2.3		1.1	
Event and Congress organizer	3.2		1.0		2.3	
Online Booking Agency (OTA)	17.9	20.2	18.8	24.9	18.2	22.0
Globale Distributionssysteme (GDS)	1.6		5.9		3.3	
Social Media Channels	0.7		0.2		0.5	
other distribution channels	3.9	3.9	1.2	1.2	2.9	2.9

Market shares in % of overnights. Data from survey and aggregated data from hotel chains.

Weighted market shares of distribution channels in Finland: 2013 to 2017

	Market share 2017 (n=116)		Market share 2015 (n=77)		Market share 2013 (n=66)		DELTA	
Direct - Phone	28.6		24.7		30.0		-1.4	
Direct - Mail / fax	0.2		0.5		1.2		-1.0	
Direct - Walk-In (persons without reservation)	4.0		4.5		5.6		-1.5	
Direct - Contact form on own website (without availabilty check)	4.9	65.1	5.5	63.2	5.2	67.6	-0.3	-2.6
Direct - Email	15.7		15.1		18.5		-2.8	
Direct - real time booking over own website with availabilty check	11.6		12.9		7.0		4.5	
Destination Marketing Organization (DMO) / trade associations	0.5	0.5	0.4	0.5	2.0	2.2	-1.5	-1.7
National Tourism Organization (NTO)	0.0		0.1		0.3		-0.2	
Tour operator / Travel agency	4.5		4.0		5.1		-0.7	
Hotel chains and cooperations with CRS	1.6		4.4		1.9		-0.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.1	9.6	3.6	14.5	3.3	13.2	-2.2	-3.6
Event and Congress organizer	2.3		2.5		2.8		-0.4	
Online Booking Agency (OTA)	18.2		16.0		12.3		**5.9**	
Globale Distributionssysteme (GDS)	3.3	22.0	4.1	20.2	2.5	15.0	0.8	7.0
Social Media Channels	0.5		0.1		0.2		0.3	
other distribution channels	2.9	2.9	1.6	1.6	2.0	2.0	0.9	0.9

Market shares in % of overnights.

Market shares of distribution channels 2017: France

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Unweighted sample: n=158	Market share		confidence interval (bootstrap)	
Direct - Phone	26.3	62.8	23.6	28.7
Direct - Mail / fax	1.6		1.3	1.9
Direct - Walk-In (persons without reservation)	8.5		7.2	9.6
Direct - Contact form on own website (without availability check)	3.7		2.9	5.5
Direct - Email	10.3		8.9	12.3
Direct - real time booking over own website with availability check	12.5		10.9	13.8
Destination Marketing Organization (DMO) / trade associations	0.7	1.1	0.4	1.0
National Tourism Organization (NTO)	0.4		0.2	0.6
Tour operator / Travel agency	3.8	9.2	2.9	4.6
Hotel chains and cooperations with CRS	2.5		1.8	3.2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.1		0.7	1.5
Event and Congress organizer	1.9		1.4	2.4
Online Booking Agency (OTA)	22.4	24.7	20.2	25.1
Globale Distributionssysteme (GDS)	2.0		1.5	2.5
Social Media Channels	0.3		0.0	0.6
other distribution channels	2.2	2.2	1.7	2.7

In SME hotels, the OTA market share is 25% whereas in hotels from chains the proportion is 18.11%.

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Germany

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Unweighted sample: n=594	Market share		confidence interval (bootstrap)	
Direct - Phone	22.1	60.9	21.1	23.2
Direct - Mail / fax	2.4		2.1	2.6
Direct - Walk-In (persons without reservation)	4.1		3.8	4.5
Direct - Contact form on own website (without availability check)	6.7		5.9	7.5
Direct - Email	17.2		16.3	18.4
Direct - real time booking over own website with availability check	8.4		7.8	9.2
Destination Marketing Organization (DMO) / trade associations	0.6	1.0	0.3	0.9
National Tourism Organization (NTO)	0.4		0.1	0.6
Tour operator / Travel agency	3.9	7.1	3.3	4.5
Hotel chains and cooperations with CRS	1.1		0.8	1.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.8		0.5	1.1
Event and Congress organizer	1.4		1.0	1.7
Online Booking Agency (OTA)	27.7	29.7	26.4	29.1
Globale Distributionssysteme (GDS)	1.7		1.4	2.0
Social Media Channels	0.3		0.1	0.5
other distribution channels	1.3	1.3	0.9	1.7

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels in Germany: 2013 to 2017

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Hochschule für Wirtschaft & Tourismus

Unweighted samples	Market share 2017 (n=594)		Market share 2015 (n=485)		Market share 2013 (n=575)		DELTA	
Direct - Phone	22.1	60.9	26.3	65.5	27.7	67.3	-5.51	-6.40
Direct - Mail / fax	2.4		3.1		4.3		-1.94	
Direct - Walk-In (persons without reservation)	4.1		5.5		4.9		-0.79	
Direct - Contact form on own website (without availabilty check)	6.7		7.8		7.2		-0.54	
Direct - Email	17.2		16.6		17.2		0.06	
Direct - real time booking over own website with availabilty check	8.4		6.3		6.1		2.32	
Destination Marketing Organization (DMO) / trade associations	0.6	1.0	1.0	1.8	0.9	1.7	-0.37	-0.79
National Tourism Organization (NTO)	0.4		0.8		0.8		-0.42	
Tour operator / Travel agency	3.9	7.1	3.4	5.7	4.4	7.6	-0.51	-0.47
Hotel chains and cooperations with CRS	1.1		0.7		0.9		0.11	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.8		0.5		0.7		0.06	
Event and Congress organizer	1.4		1.1		1.5		-0.13	
Online Booking Agency (OTA)	27.7	29.7	24.5	25.9	20.6	22.4	**7.14**	**7.38**
Globale Distributionssysteme (GDS)	1.7		1.1		1.6		0.15	
Social Media Channels	0.3		0.3		0.2		0.09	
other distribution channels	1.3	1.3	1.1	1.1	1.0	1.0	0.26	0.26

Unweighted samples. Market shares in % of overnights.

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Weighted market shares of distribution channels in Germany: 2017

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	SME hotels 2015 (n=431)		Chain hotels 2015 (n=607)		Weighted average	
weighting	55%		45%			
Direct - Phone	22.9	63.1	18.2	58.3	20.8	61.0
Direct - Mail / fax	2.5		1.6		2.1	
Direct - Walk-In (persons without reservation)	4.5		2.8		3.7	
Direct - Contact form on own website (without availabilty check)	8.1		1.9		5.3	
Direct - Email	17.6		18.6		18.0	
Direct - real time booking over own website with availabilty check	7.5		15.1		10.9	
Destination Marketing Organization (DMO) / trade associations	0.6	0.9	0.1	0.2	0.4	0.6
National Tourism Organization (NTO)	0.4		0.1		0.2	
Tour operator / Travel agency	3.5	4.6	1.6	7.4	2.7	5.9
Hotel chains and cooperations with CRS	0.0		0.8		0.4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		1.8		1.0	
Event and Congress organizer	0.7		3.1		1.8	
Online Booking Agency (OTA)	28.9	29.9	26.5	33.4	27.8	31.5
Globale Distributionssysteme (GDS)	0.7		6.7		3.4	
Social Media Channels	0.3		0.2		0.3	
other distribution channels	1.5	1.5	0.7	0.7	1.1	1.1

Market shares in % of overnights. Data from online survey and aggregated data from chain hotels

Hotrec Hospitality Europe

Weighted market shares of distribution channels in Germany: 2013 to 2017

	Market share 2017 (n=1038)		Market share 2015 (n=994)		Market share 2013 (n=966)		DELTA (2017-2013)	
Direct - Phone	20.8	61.0	22.6	63.5	55.6	63.7	-5.5	-2.7
Direct - Mail / fax	2.1		4.4					
Direct - Walk-In (persons without reservation)	3.7		4.2					
Direct - Contact form on own website (without availabilty check)	5.3		5.3					
Direct - Email	18.0		18.1					
Direct - real time booking over own website with availabilty check	10.9		9.0		8.1		2.8	
Destination Marketing Organization (DMO) / trade associations	0.4	0.6	0.6	1.1	0.7	1.2	-0.3	-0.6
National Tourism Organization (NTO)	0.2		0.5		0.6		-0.4	
Tour operator / Travel agency	2.7	5.9	2.9	7.3	4.3	10.7	-1.6	-4.8
Hotel chains and cooperations with CRS	0.4		2.6		0.4		0.0	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		0.9		1.2		-0.2	
Event and Congress organizer	1.8		0.9		4.8		-3.0	
Online Booking Agency (OTA)	27.8	31.5	24.1	27.4	20.9	23.7	6.9	7.8
Globale Distributionssysteme (GDS)	3.4		3.1		2.6		0.8	
Social Media Channels	0.3		0.2		0.2		0.1	
other distribution channels	1.1	1.1	0.7	0.7	0.7	0.7	0.4	0.4

Market shares in % of overnights. Data from online survey and aggregated data from chain hotels

Market shares of distribution channels 2017: Greece

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Unweighted sample: n=121	Market share 2017		confidence interval (bootstrap)	
Direct - Phone	17.6	43.2	14.9	20.6
Direct - Mail / fax	0.9		0.7	1.1
Direct - Walk-In (persons without reservation)	5.6		4.3	6.8
Direct - Contact form on own website (without availability check)	4.4		2.9	6.1
Direct - Email	8.4		7.0	10.0
Direct - real time booking over own website with availability check	6.5		4.9	8.2
Destination Marketing Organization (DMO) / trade associations	0.1	0.3	0.0	0.2
National Tourism Organization (NTO)	0.2		0.1	0.3
Tour operator / Travel agency	25.5	29.0	20.7	29.4
Hotel chains and cooperations with CRS	0.0		0.0	0.2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.1		2.5	3.8
Event and Congress organizer	0.4		0.3	0.5
Online Booking Agency (OTA)	23.6	25.4	20.0	26.8
Globale Distributionssysteme (GDS)	0.8		0.6	0.9
Social Media Channels	1.1		0.8	1.3
other distribution channels	2.0	2.0	1.7	2.3

Market shares in % of overnights.

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Market shares of distribution channels in Greece: 2013 to 2017

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	Market share 2017 (n=121)		Market share 2015 (n=179)		Market share 2013 (n=266)		DELTA	
Direct - Phone	17.6	43.2	18.6	47.8	22.4	54.7	-4.80	-11.44
Direct - Mail / fax	0.9		1.3		1.6		-0.74	
Direct - Walk-In (persons without reservation)	5.6		7.9		11.0		-5.38	
Direct - Contact form on own website (without availabilty check)	4.4		4.9		4.7		-0.38	
Direct - Email	8.4		9.9		9.0		-0.61	
Direct - real time booking over own website with availabilty check	6.5		5.3		6.0		0.47	
Destination Marketing Organization (DMO) / trade associations	0.1	0.3	0.5	1.0	0.8	1.3	-0.62	-1.01
National Tourism Organization (NTO)	0.2		0.5		0.6		-0.39	
Tour operator / Travel agency	25.5	29.0	19.3	24.7	19.4	24.3	6.08	4.76
Hotel chains and cooperations with CRS	0.0		0.4		0.6		-0.55	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.1		4.4		3.9		-0.78	
Event and Congress organizer	0.4		0.7		0.4		0.01	
Online Booking Agency (OTA)	23.6	25.4	22.9	24.5	16.3	18.1	**7.26**	7.34
Globale Distributionssysteme (GDS)	0.8		0.7		0.5		0.28	
Social Media Channels	1.1		0.9		1.3		-0.20	
other distribution channels	2.0	2.0	2.0	2.0	1.5	1.5	0.55	0.55

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Hungary

Unweighted sample: n=118	Market share		confidence interval (bootstrap)	
Direct - Phone	9.2	41.5	7.8	11.5
Direct - Mail / fax	0.5		0.4	0.7
Direct - Walk-In (persons without reservation)	3.3		2.1	4.9
Direct - Contact form on own website (without availability check)	6.6		5.0	8.3
Direct - Email	15.9		13.5	18.1
Direct - real time booking over own website with availability check	5.9		4.9	7.2
Destination Marketing Organization (DMO) / trade associations	0.2	0.8	0.1	0.3
National Tourism Organization (NTO)	0.6		0.5	0.8
Tour operator / Travel agency	12.2	20.1	9.7	14.7
Hotel chains and cooperations with CRS	0.7		0.5	0.8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.4		2.7	4.2
Event and Congress organizer	3.8		3.1	4.7
Online Booking Agency (OTA)	33.5	35.2	30.7	36.8
Globale Distributionssysteme (GDS)	1.2		1.0	1.5
Social Media Channels	0.5		0.4	0.6
other distribution channels	2.5	2.5	2.1	2.9

Market shares in % of overnights.

Market shares of distribution channels in Hungary: 2013 to 2017

	Market share 2017 (n=118)		Market share 2015 (n=78)		Market share 2013 (n=76)		DELTA (2017-2013)	
Direct - Phone	9.2	41.5	9.7	47.7	12.8	56.7	-3.64	-15.23
Direct - Mail / fax	0.5		0.6		2.4		-1.88	
Direct - Walk-In (persons without reservation)	3.3		3.1		3.5		-0.16	
Direct - Contact form on own website (without availabilty check)	6.6		11.7		11.9		-5.30	
Direct - Email	15.9		17.7		20.2		-4.27	
Direct - real time booking over own website with availabilty check	5.9		4.8		5.9		0.02	
Destination Marketing Organization (DMO) / trade associations	0.2	0.8	0.1	0.2	0.8	1.5	-0.60	-0.63
National Tourism Organization (NTO)	0.6		0.1		0.7		-0.03	
Tour operator / Travel agency	12.2	20.1	11.6	22.4	9.3	19.2	2.89	0.83
Hotel chains and cooperations with CRS	0.7		0.7		1.0		-0.31	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.4		5.5		4.6		-1.19	
Event and Congress organizer	3.8		4.5		4.4		-0.56	
Online Booking Agency (OTA)	33.5	35.2	25.8	26.9	19.1	21.4	**14.40**	13.76
Globale Distributionssysteme (GDS)	1.2		0.6		1.9		-0.69	
Social Media Channels	0.5		0.6		0.4		0.05	
other distribution channels	2.5	2.5	2.9	2.9	1.2	1.2	1.26	1.26

Unweighted samples. Market shares in % of overnights.

Weighted market shares of distribution channels in Hungary: 2017

	SME hotels 2017 (n=72)		Chain hotels 2017 (n=58)		Weighted average	
weighting	67%		33%			
Direct - Phone	11.6	50.3	4.3	20.9	9.2	40.6
Direct - Mail / fax	0.5		0.4		0.5	
Direct - Walk-In (persons without reservation)	4.8		0.7		3.4	
Direct - Contact form on own website (without availabilty chec	7.6		3.4		6.2	
Direct - Email	19.1		8.2		15.5	
Direct - real time booking over own website with availabilty che	6.8		3.9		5.8	
Destination Marketing Organization (DMO) / trade associations	0.3	1.3	0.0	0.0	0.2	0.9
National Tourism Organization (NTO)	1.0		0.0		0.7	
Tour operator / Travel agency	6.9	13.7	27.5	34.8	13.7	20.6
Hotel chains and cooperations with CRS	0.0		1.8		0.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.1		2.5		2.9	
Event and Congress organizer	3.6		3.0		3.4	
Online Booking Agency (OTA)	30.4	32.2	36.0	37.0	32.3	33.8
Globale Distributionssysteme (GDS)	1.3		0.8		1.1	
Social Media Channels	0.6		0.2		0.4	
other distribution channels	2.5	2.5	7.2	7.2	4.1	4.1

Market shares in % of overnights.

Weighted market shares of distribution channels in Hungary: 2013 to 2017

	Market share 2017 (n=130)		Market share 2015 (n=98)		Market share 2013 (n=75)		DELTA	
Direct - Phone	9.2	40.6	9.0	47.8	13.0	57.3	-3.8	-16.7
Direct - Mail / fax	0.5		0.4		2.5		-2.0	
Direct - Walk-In (persons without reservation)	3.4		3.0		3.5		-0.1	
Direct - Contact form on own website (without availabilty check)	6.2		12.0		12.0		-5.9	
Direct - Email	15.5		18.5		20.4		-4.9	
Direct - real time booking over own website with availabilty check	5.8		4.9		5.9		-0.0	
Destination Marketing Organization (DMO) / trade associations	0.2	0.9	0.1	0.2	0.8	1.5	-0.6	-0.6
National Tourism Organization (NTO)	0.7		0.1		0.7		0.0	
Tour operator / Travel agency	13.7	20.6	15.4	27.8	9.1	18.8	**4.6**	1.8
Hotel chains and cooperations with CRS	0.6		1.4		0.9		-0.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.9		4.0		4.5		-1.6	
Event and Congress organizer	3.4		6.9		4.3		-0.9	
Online Booking Agency (OTA)	32.3	33.8	21.3	22.4	19.0	21.3	**13.3**	12.5
Globale Distributionssysteme (GDS)	1.1		0.5		1.9		-0.8	
Social Media Channels	0.4		0.6		0.4		0.0	
other distribution channels	4.1	4.1	1.7	1.7	1.2	1.2	2.9	2.9

Market shares in % of overnights.

Market shares of distribution channels 2017: Italy

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Unweighted sample	Market share 2017 (n=344)		confidence interval (bootstrap)		Market share 2017 (without South Tyrol, n=230)	
Direct - Phone	18.1	64.1	16.5	19.7	21.0	60.0
Direct - Mail / fax	1.4		1.1	1.7	1.2	
Direct - Walk-In (persons without reservation)	4.3		3.7	5.0	4.8	
Direct - Contact form on own website (without availability check)	10.2		9.0	11.4	6.5	
Direct - Email	24.7		23.1	26.4	20.8	
Direct - real time booking over own website with availability check	5.5		4.7	6.3	5.8	
Destination Marketing Organization (DMO) / trade associations	1.9	2.9	1.5	2.2	1.4	2.1
National Tourism Organization (NTO)	1.0		0.7	1.3	0.8	
Tour operator / Travel agency	8.1	10.1	7.1	9.1	9.2	12.0
Hotel chains and cooperations with CRS	0.2		0.0	0.4	0.2	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		0.8	1.6	1.7	
Event and Congress organizer	0.6		0.3	0.9	0.9	
Online Booking Agency (OTA)	20.3	21.4	18.4	22.2	22.9	24.4
Globale Distributionssysteme (GDS)	0.3		0.1	0.5	0.5	
Social Media Channels	0.9		0.6	1.2	1.0	
other distribution channels	1.5	1.5	1.1	1.9	1.4	1.4

Market shares in % of overnights.

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Market shares of distribution channels in Italy: 2015 to 2017

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	Market share 2017 (n=344)		Market share 2015 (n=260)		DELTA (2017-2015)	
Direct - Phone	18.1	64.1	20.4	59.3	-2.32	4.71
Direct - Mail / fax	1.4		2.0		-0.66	
Direct - Walk-In (persons without reservation)	4.3		5.1		-0.79	
Direct - Contact form on own website (without availabilty check)	10.2		7.3		2.88	
Direct - Email	24.7		18.6		6.10	
Direct - real time booking over own website with availabilty check	5.5		6.0		-0.50	
Destination Marketing Organization (DMO) / trade associations	1.9	2.9	0.6	1.4	1.27	1.45
National Tourism Organization (NTO)	1.0		0.8		0.18	
Tour operator / Travel agency	8.1	10.1	9.8	15.4	-1.63	-5.22
Hotel chains and cooperations with CRS	0.2		0.9		-0.68	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		2.9		-1.72	
Event and Congress organizer	0.6		1.8		-1.19	
Online Booking Agency (OTA)	20.3	21.4	20.5	22.6	**-0.22**	-1.17
Globale Distributionssysteme (GDS)	0.3		1.6		-1.23	
Social Media Channels	0.9		0.6		0.28	
other distribution channels	1.5	1.5	1.3	1.3	0.20	0.20

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Netherlands

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Unweighted sample: n=147	Market share		confidence interval (bootstrap)	
Direct - Phone	12.4	45.9	11.1	14.0
Direct - Mail / fax	6.0		4.3	8.1
Direct - Walk-In (persons without reservation)	2.7		2.3	3.2
Direct - Contact form on own website (without availability check)	2.6		2.1	3.3
Direct - Email	11.7		10.1	13.7
Direct - real time booking over own website with availability check	10.5		9.1	11.9
Destination Marketing Organization (DMO) / trade associations	0.5	0.5	0.4	0.5
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	3.2	5.3	2.7	3.8
Hotel chains and cooperations with CRS	0.4		0.3	0.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.9		0.7	1.1
Event and Congress organizer	0.9		0.7	1.1
Online Booking Agency (OTA)	44.8	47.2	41.9	47.5
Globale Distributionssysteme (GDS)	1.8		1.5	2.2
Social Media Channels	0.6		0.5	0.8
other distribution channels	1.1	1.1	0.9	1.3

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Norway

Unweighted sample: n=53	Market share		confidence interval (bootstrap)	
Direct - Phone	23.4	55.6	18.9	27.3
Direct - Mail / fax	1.4		1.1	1.8
Direct - Walk-In (persons without reservation)	2.9		2.3	3.7
Direct - Contact form on own website (without availability check)	4.3		3.3	5.3
Direct - Email	13.3		9.6	16.9
Direct - real time booking over own website with availability check	10.3		8.1	12.5
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.5	0.8
National Tourism Organization (NTO)	0.0		0.0	0.0
Tour operator / Travel agency	12.1	14.7	8.5	16.4
Hotel chains and cooperations with CRS	0.3		0.2	0.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.3		1.0	1.6
Event and Congress organizer	0.9		0.7	1.1
Online Booking Agency (OTA)	21.2	27.7	17.2	25.8
Globale Distributionssysteme (GDS)	6.4		4.9	8.0
Social Media Channels	0.1		0.1	0.2
other distribution channels	1.4	1.4	1.1	1.7

Market shares in % of overnights.

Market shares of distribution channels in Norway: 2013 to 2017

	Market share 2017 (n=53)		Market share 2015 (n=102)		Market share 2013 (n=55)		DELTA	
Direct - Phone	23.4	55.6	14.3	38.8	24.9	68.3	-1.53	-12.71
Direct - Mail / fax	1.4		2.4		5.4		-4.01	
Direct - Walk-In (persons without reservation)	2.9		2.9		3.8		-0.88	
Direct - Contact form on own website (without availabilty check)	4.3		2.8		2.6		1.67	
Direct - Email	13.3		14.9		22.9		-9.64	
Direct - real time booking over own website with availabilty check	10.3		1.6		8.6		1.68	
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.2	0.3	0.5	0.7	0.13	-0.07
National Tourism Organization (NTO)	0.0		0.1		0.2		-0.20	
Tour operator / Travel agency	12.1	14.7	3.8	36.3	4.2	12.4	7.97	2.32
Hotel chains and cooperations with CRS	0.3		17.6		3.8		-3.48	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.3		1.4		0.8		0.56	
Event and Congress organizer	0.9		13.4		3.7		-2.73	
Online Booking Agency (OTA)	21.2	27.7	12.4	24.6	9.1	18.6	**12.02**	9.10
Globale Distributionssysteme (GDS)	6.4		12.1		8.6		-2.21	
Social Media Channels	0.1		0.1		0.8		-0.71	
other distribution channels	1.4	1.4	0.0	0.0	0.0	0.0	1.34	1.34

Unweighted samples. In 2015 there were only 5 SME hotels in the sample. Market shares in % of overnights.

Weighted market shares of distribution channels 2017: Norway

	SME hotels 2017 (n=26)		Chain hotels 2017 (n=120)		Weighted average	
weighting	20.5%		79.5%			
Direct - Phone	17.9	55.6	10.2	58.2	11.8	57.6
Direct - Mail / fax	2.4		1.6		1.8	
Direct - Walk-In (persons without reservation)	5.2		2.2		2.8	
Direct - Contact form on own website (without availabilty check)	5.6		8.6		8.0	
Direct - Email	19.9		20.1		20.0	
Direct - real time booking over own website with availabilty check	4.7		15.5		13.2	
Destination Marketing Organization (DMO) / trade associations	0.1	0.2	0.3	0.3	0.3	0.3
National Tourism Organization (NTO)	0.1		0.0		0.0	
Tour operator / Travel agency	18.4	19.5	11.2	14.7	12.7	15.7
Hotel chains and cooperations with CRS	0.0		0.2		0.1	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		1.3		1.1	
Event and Congress organizer	0.7		2.0		1.8	
Online Booking Agency (OTA)	24.6	24.8	13.5	25.5	15.8	25.4
Globale Distributionssysteme (GDS)	0.0		12.0		9.5	
Social Media Channels	0.2		0.0		0.1	
other distribution channels	0.0	0.0	1.3	1.3	1.0	1.0

Market shares in % of overnights.

Weighted market shares of distribution channels in Norway: 2013 to 2017

	Market share 2017 (n=146)		Market share 2015 (n=185)		Market share 2013 (n=55)		DELTA (2017-2013)	
Direct - Phone	11.8	57.6	17.1	52.2	24.9	68.9	-13.1	-11.3
Direct - Mail / fax	1.8		4.6		5.4		-3.6	
Direct - Walk-In (persons without reservation)	2.8		2.3		4.3		-1.5	
Direct - Contact form on own website (without availabilty check)	8.0		4.5		2.9		5.1	
Direct - Email	20.0		17.8		23.2		-3.1	
Direct - real time booking over own website with availabilty check	13.2		5.9		8.2		5.0	
Destination Marketing Organization (DMO) / trade associations	0.3	0.3	0.1	0.1	0.6	0.8	-0.3	-0.5
National Tourism Organization (NTO)	0.0		0.0		0.2		-0.2	
Tour operator / Travel agency	12.7	15.7	2.0	21.6	4.4	12.5	8.3	3.1
Hotel chains and cooperations with CRS	0.1		9.1		3.5		-3.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.1		3.3		0.7		0.4	
Event and Congress organizer	1.8		7.2		4.0		-2.2	
Online Booking Agency (OTA)	15.8	25.4	15.5	26.1	8.9	17.7	6.9	7.6
Globale Distributionssysteme (GDS)	9.5		10.6		7.8		1.7	
Social Media Channels	0.1		0.0		1.0		-0.9	
other distribution channels	1.0	1.0	0.0	0.0	0.0	0.0	1.0	1.0

Unweighted samples. In 2015 there were only 5 SME hotels in the sample. Market shares in % of overnights.

Market shares of distribution channels 2017: Spain

Unweighted sample: n=156	Market share		confidence interval (bootstrap)	
Direct - Phone	7.9	32.1	6.6	9.3
Direct - Mail / fax	1.3		1.1	1.5
Direct - Walk-In (persons without reservation)	3.2		2.6	3.9
Direct - Contact form on own website (without availability check)	3.3		2.8	3.9
Direct - Email	6.4		5.4	7.5
Direct - real time booking over own website with availability check	9.9		8.5	11.3
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	1.1	1.5
National Tourism Organization (NTO)	0.1		0.1	0.1
Tour operator / Travel agency	15.3	30.4	12.3	17.9
Hotel chains and cooperations with CRS	2.2		1.8	2.6
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	7.8		6.8	9.0
Event and Congress organizer	5.1		4.0	6.2
Online Booking Agency (OTA)	30.8	35.1	27.9	33.1
Globale Distributionssysteme (GDS)	4.2		3.4	5.2
Social Media Channels	0.2		0.0	0.4
other distribution channels	1.1	1.1	0.8	1.4

Market shares in % of overnights.

Market shares of distribution channels in Spain: 2013 to 2017

	Market share 2017 (n=156)		Market share 2015 (n=132)		Market share 2013 (n=153)		DELTA (2017-2013)	
Direct - Phone	7.9	32.1	10.5	37.2	16.7	43.6	-8.82	-11.58
Direct - Mail / fax	1.3		1.8		2.7		-1.36	
Direct - Walk-In (persons without reservation)	3.2		3.7		6.1		-2.88	
Direct - Contact form on own website (without availabilty check)	3.3		2.6		3.3		0.00	
Direct - Email	6.4		8.4		6.5		-0.07	
Direct - real time booking over own website with availabilty check	9.9		10.2		8.3		1.55	
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	1.1	1.3	0.3	0.4	1.01	0.95
National Tourism Organization (NTO)	0.1		0.1		0.1		-0.06	
Tour operator / Travel agency	15.3	30.4	12.7	28.4	16.0	30.2	-0.71	0.18
Hotel chains and cooperations with CRS	2.2		2.6		3.6		-1.41	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	7.8		9.0		8.6		-0.79	
Event and Congress organizer	5.1		4.0		2.0		3.09	
Online Booking Agency (OTA)	30.8	35.1	27.6	31.5	21.7	24.0	**9.10**	11.09
Globale Distributionssysteme (GDS)	4.2		3.6		1.9		2.30	
Social Media Channels	0.2		0.3		0.5		-0.31	
other distribution channels	1.1	1.1	1.7	1.7	1.8	1.8	-0.66	-0.66

Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels 2017: Sweden

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Unweighted sample: n=140	Market share		confidence interval (bootstrap)	
Direct - Phone	21.6	53.7	19.5	24.1
Direct - Mail / fax	0.2		0.2	0.2
Direct - Walk-In (persons without reservation)	3.2		2.7	3.8
Direct - Contact form on own website (without availability check)	3.4		2.9	4.1
Direct - Email	17.6		15.7	19.5
Direct - real time booking over own website with availability check	7.7		6.2	9.0
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	1.1	1.5
National Tourism Organization (NTO)	0.1		0.1	0.2
Tour operator / Travel agency	5.3	10.5	4.0	7.0
Hotel chains and cooperations with CRS	3.1		2.6	3.7
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		0.3	0.4
Event and Congress organizer	1.8		1.5	2.1
Online Booking Agency (OTA)	29.6	33.7	26.5	32.7
Globale Distributionssysteme (GDS)	3.4		2.6	4.5
Social Media Channels	0.7		0.5	0.9
other distribution channels	0.7	0.7	0.5	0.9

Confidence intervals are stated at the 95% level. Market shares in % of overnights..

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Market shares of distribution channels in Sweden: 2015 to 2017

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	Market share 2017 (n=140)		Market share 2015 (n=74)		Market share 2013 (n=17!)		DELTA (2017-2015)	
Direct - Phone	21.6	53.7	15.5	39.5	34.1	74.7	6.18	14.22
Direct - Mail / fax	0.2		1.5		1.2		-1.32	
Direct - Walk-In (persons without reservation)	3.2		3.4		4.5		-0.17	
Direct - Contact form on own website (without availabilty check)	3.4		3.1		6.9		0.39	
Direct - Email	17.6		16.1		22.2		1.51	
Direct - real time booking over own website with availabilty check	7.7		0.1		5.8		7.63	
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	0.0	0.1	2.2	3.5	1.29	1.37
National Tourism Organization (NTO)	0.1		0.1		1.4		0.08	
Tour operator / Travel agency	5.3	10.5	4.4	39.6	4.1	4.4	0.83	-29.09
Hotel chains and cooperations with CRS	3.1		24.2		0.1		-21.10	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		0.9		0.0		-0.49	
Event and Congress organizer	1.8		10.1		0.2		-8.33	
Online Booking Agency (OTA)	29.6	33.7	8.8	20.9	11.8	13.6	20.79	12.81
Globale Distributionssysteme (GDS)	3.4		12.1		1.5		-8.65	
Social Media Channels	0.7		0.0		0.3		0.67	
other distribution channels	0.7	0.7	0.0	0.0	3.8	3.8	0.69	0.69

Observations for 2013 not sufficient. Unweighted sample.
Market shares in % of overnights.

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Weighted market shares of distribution channels 2017: Sweden

	SME hotels 2017 (n=94)		Chain hotels 2017 (n=125)		Weighted average	
weighting	56%		44%			
Direct - Phone	21.9	55.1	9.7	54.4	16.5	54.8
Direct - Mail / fax	0.1		0.4		0.2	
Direct - Walk-In (persons without reservation)	3.1		4.0		3.5	
Direct - Contact form on own website (without availabilty check)	3.9		3.1		3.5	
Direct - Email	17.4		21.1		19.0	
Direct - real time booking over own website with availabilty check	8.6		16.3		12.0	
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	0.3	0.3	0.8	0.9
National Tourism Organization (NTO)	0.1		0.0		0.1	
Tour operator / Travel agency	5.6	8.3	9.3	13.4	7.2	10.5
Hotel chains and cooperations with CRS	1.0		1.6		1.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.2		0.6		0.4	
Event and Congress organizer	1.5		1.8		1.6	
Online Booking Agency (OTA)	31.6	34.6	15.9	30.7	24.7	32.9
Globale Distributionssysteme (GDS)	2.4		14.7		7.8	
Social Media Channels	0.7		0.1		0.5	
other distribution channels	0.7	0.7	1.2	1.2	0.9	0.9

Market shares in % of overnights.

<u>Weighted</u> market shares of distribution channels in Sweden: 2013 to 2017

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	Market share 2017 (n=219)		Market share 2015 (n=157)		Market share 2013 (n=17)		DELTA (2017-2015)	
Direct - Phone	16.5	54.8	18.3	43.9	33.8	72.5	-1.8	10.9
Direct - Mail / fax	0.2		0.8		1.8		-0.5	
Direct - Walk-In (persons without reservation)	3.5		3.3		3.7		0.2	
Direct - Contact form on own website (without availabilty check)	3.5		3.0		4.8		0.5	
Direct - Email	19.0		11.1		22.7		7.9	
Direct - real time booking over own website with availabilty check	12.0		7.3		5.6		4.7	
Destination Marketing Organization (DMO) / trade associations	0.8	0.9	0.0	0.7	2.5	4.2	0.8	0.2
National Tourism Organization (NTO)	0.1		0.7		1.7		-0.7	
Tour operator / Travel agency	7.2	10.5	19.5	31.4	5.7	6.0	-12.3	-20.9
Hotel chains and cooperations with CRS	1.3		8.1		0.1		-6.9	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		1.5		0.0		-1.2	
Event and Congress organizer	1.6		2.2		0.2		-0.6	
Online Booking Agency (OTA)	24.7	32.9	18.6	23.9	11.2	12.4	6.1	9.0
Globale Distributionssysteme (GDS)	7.8		5.4		1.0		2.4	
Social Media Channels	0.5		0.0		0.2		0.5	
other distribution channels	0.9	0.9	0.0	0.0	4.9	4.9	0.9	0.9

Bias in samples 2013/2015 -> results on evolution not reliable! Market shares in % of overnights.

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Market shares of distribution channels 2017: Switzerland

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Unweighted sample: n=252	Market share		confidence interval	
Direct - Phone	18.3	59.2	16.7	20.0
Direct - Mail / fax	1.7		1.2	2.2
Direct - Walk-In (persons without reservation)	5.1		4.5	5.7
Direct - Contact form on own website (without availability check)	6.9		5.9	8.5
Direct - Email	18.9		17.3	20.5
Direct - real time booking over own website with availability check	8.2		7.1	9.4
associations	1.4	2.5	1.2	1.7
National Tourism Organization (NTO)	1.1		0.9	1.3
Tour operator / Travel agency	3.8	6.4	2.9	4.6
Hotel chains and cooperations with CRS	0.6		0.3	0.9
Transhotel, etc.)	0.7		0.3	1.1
Event and Congress organizer	1.3		0.9	1.7
Online Booking Agency (OTA)	27.7	29.0	25.7	30.1
Globale Distributionssysteme (GDS)	1.1		0.8	1.4
Social Media Channels	0.2		0.0	0.5
other distribution channels	2.9	2.9	2.5	3.3

Confidence intervals are stated at the 95% level. Market shares in % of overnights.

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Market shares of distribution channels in Switzerland: 2013 to 2017

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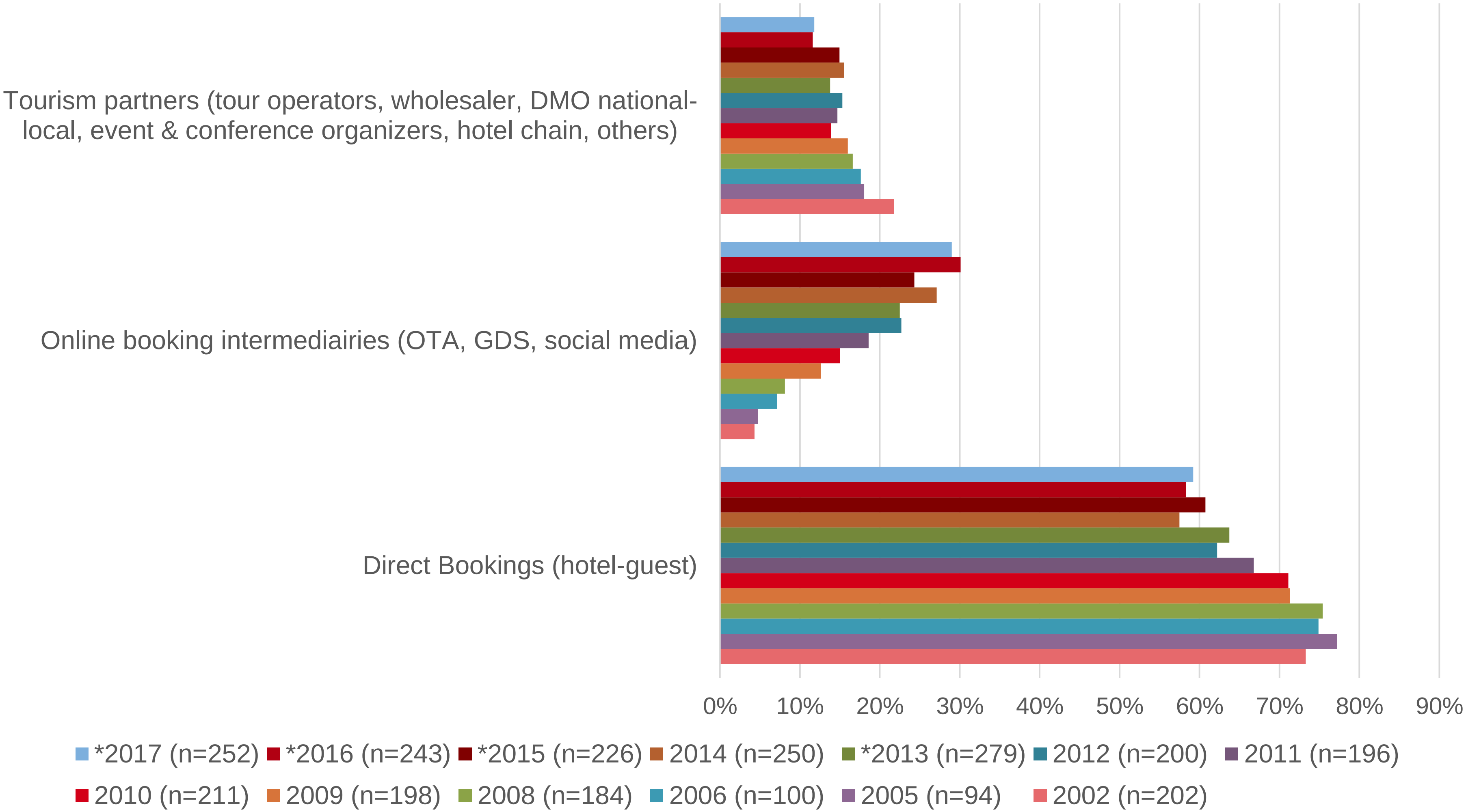
Hochschule für Wirtschaft & Tourismus

	Market share 2017 (n=252)		Market share 2015 (n=329)		Market share 2013 (n=279)		DELTA	
Direct - Phone	18.3	59.2	19.9	60.7	20.6	63.7	-2.30	-4.57
Direct - Mail / fax	1.7		2.0		2.2		-0.53	
Direct - Walk-In (persons without reservation)	5.1		4.7		5.9		-0.75	
Direct - Contact form on own website (without availabilty check)	6.9		5.0		6.4		0.54	
Direct - Email	18.9		21.6		21.2		-2.27	
Direct - real time booking over own website with availabilty check	8.2		7.5		7.5		0.74	
Destination Marketing Organization (DMO) / trade associations	1.4	2.5	1.4	2.1	1.4	2.5	0.08	0.04
National Tourism Organization (NTO)	1.1		0.7		1.1		-0.04	
Tour operator / Travel agency	3.8	6.4	4.6	10.3	4.6	10.0	-0.77	-3.64
Hotel chains and cooperations with CRS	0.6		1.1		1.3		-0.68	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.7		2.3		2.7		-1.96	
Event and Congress organizer	1.3		2.3		1.5		-0.23	
Online Booking Agency (OTA)	27.7	29.0	20.6	24.3	19.4	22.5	**8.31**	6.53
Globale Distributionssysteme (GDS)	1.1		3.4		2.8		-1.72	
Social Media Channels	0.2		0.4		0.3		-0.06	
other distribution channels	2.9	2.9	2.5	2.5	1.3	1.3	1.65	1.65

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Distribution Trends in the Swiss Hotel Sector 2002-2017



Attention: Market shares in % of ***bookings*** for 2002-2012 & 2014 and in % of ***overnights*** in 2013 and 2015 !

Distribution Trends in the Swiss Hotel Sector 2002-2017

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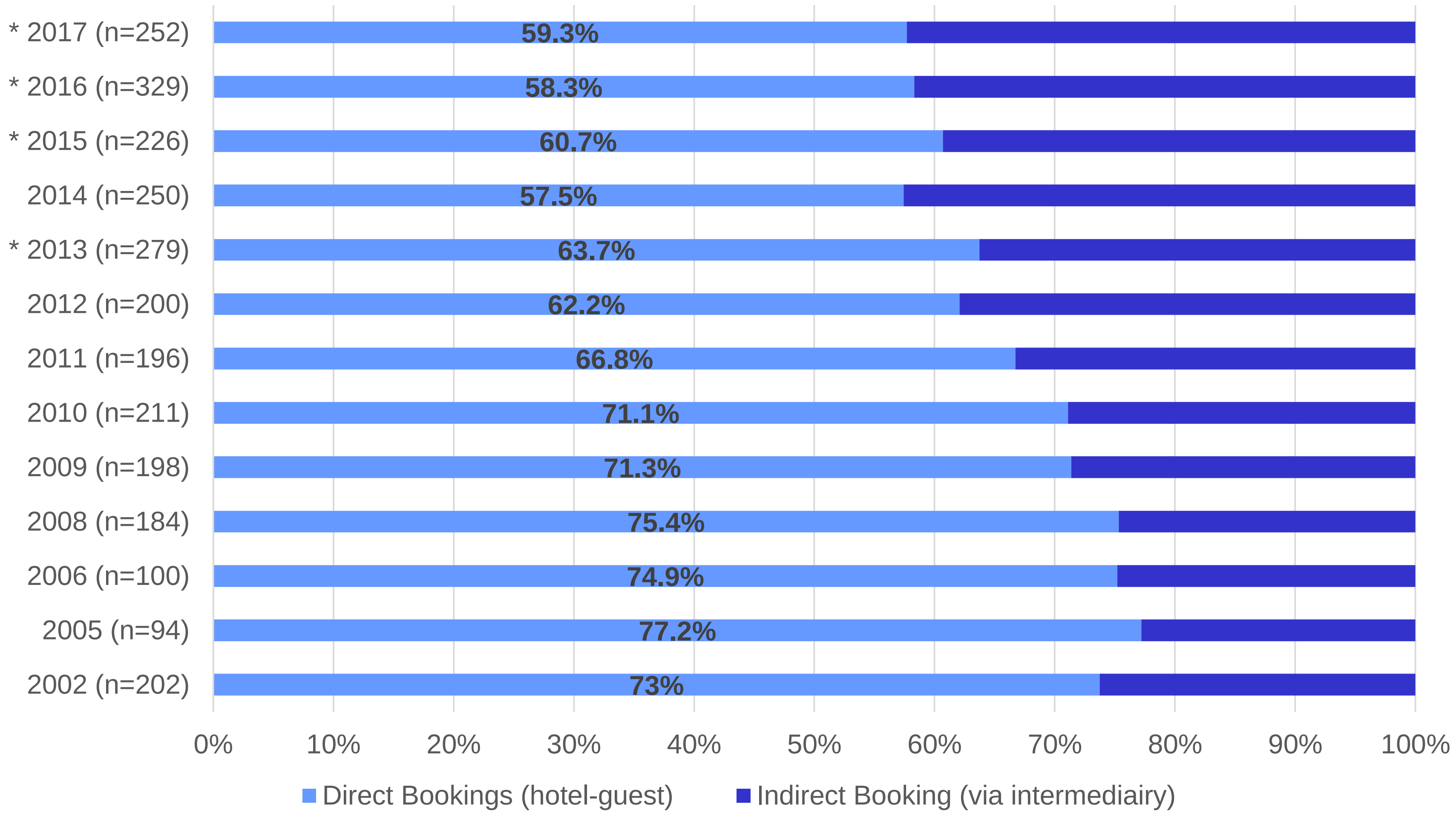

Attention: Market shares in % of ***bookings*** for 2002-2012 & 2014 and in % of ***overnights*** in 2013 and 2015 !

Distribution channels for selected countries with 20-50 valid responses

- Austria
- Belgium
- Croatia
- Denmark
- Ireland
- Latvia
- Poland
- Turkey
- United Kingdom

➢ **The following results have to be taken with care as the number of observations is not really sufficient for a reliable analysis! Results are indicative.**

Market shares of distribution channels 2017: Austria

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Unweighted sample: n=32	Market share		confidence interval (bootstrap)	
Direct - Phone	19.3	63.4	14.6	24.7
Direct - Mail / fax	1.2		0.9	1.6
Direct - Walk-In (persons without reservation)	3.3		2.3	4.3
Direct - Contact form on own website (without availability check)	9.1		6.1	12.6
Direct - Email	22.0		16.6	26.8
Direct - real time booking over own website with availability check	8.6		6.4	10.9
Destination Marketing Organization (DMO) / trade associations	1.2	1.4	0.8	1.6
National Tourism Organization (NTO)	0.3		0.2	0.4
Tour operator / Travel agency	5.3	10.5	3.1	7.9
Hotel chains and cooperations with CRS	0.5		3.8	7.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.4		1.7	3.2
Event and Congress organizer	2.3		1.6	3.0
Online Booking Agency (OTA)	21.8	23.4	16.7	28.3
Globale Distributionssysteme (GDS)	1.4		1.0	1.8
Social Media Channels	0.1		0.0	0.3
other distribution channels	1.3	1.3	1.0	1.6

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Belgium

Unweighted sample: n=40	Market share		confidence interval (bootstrap)	
Direct - Phone	11.3	62.4	8.2	14.4
Direct - Mail / fax	8.2			
Direct - Walk-In (persons without reservation)	3.4		2.4	4.3
Direct - Contact form on own website (without availability check)	8.5		4.6	12.2
Direct - Email	18.5		13.4	24.6
Direct - real time booking over own website with availability check	12.5		9.0	16.8
Destination Marketing Organization (DMO) / trade associations	0.3	0.8	0.2	0.4
National Tourism Organization (NTO)	0.5		0.4	0.7
Tour operator / Travel agency	0.6	3.8	0.4	0.8
Hotel chains and cooperations with CRS	0.3		0.2	0.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.9		1.3	2.5
Event and Congress organizer	1.0		0.7	1.3
Online Booking Agency (OTA)	30.3	31.9	24.6	35.8
Globale Distributionssysteme (GDS)	1.3		0.9	1.7
Social Media Channels	0.4		0.3	0.5
other distribution channels	1.1	1.1	0.8	1.4

Market shares in % of overnights.

Market shares of distribution channels 2017: Croatia

Unweighted sample: n=32	Market share		confidence interval (bootstrap)	
Direct - Phone	21.1	51.3	13.6	28.6
Direct - Mail / fax	6.7		4.0	9.6
Direct - Walk-In (persons without reservation)	3.3		2.3	4.2
Direct - Contact form on own website (without availability check)	2.4		1.1	4.1
Direct - Email	13.4		10.2	16.7
Direct - real time booking over own website with availability check	4.4		2.9	6.1
Destination Marketing Organization (DMO) / trade associations	0.3	0.9	0.2	0.3
National Tourism Organization (NTO)	0.6		0.4	0.9
Tour operator / Travel agency	21.7	25.4	14.7	30.3
Hotel chains and cooperations with CRS	0.5		14.1	30.1
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		0.3	0.7
Event and Congress organizer	2.0		0.8	1.7
Online Booking Agency (OTA)	19.5	20.8	13.5	25.7
Globale Distributionssysteme (GDS)	1.2		0.8	1.6
Social Media Channels	0.2		0.1	0.3
other distribution channels	1.7	1.7	1.4	2.0

Market shares in % of overnights.

Market shares of distribution channels 2017: Denmark

Unweighted sample: n=31	Market share		confidence interval (bootstrap)	
Direct - Phone	14.6	49.9	10.4	19.4
Direct - Mail / fax	3.0		2.1	3.9
Direct - Walk-In (persons without reservation)	2.7		2.1	3.5
Direct - Contact form on own website (without availability check)	3.0		2.1	3.9
Direct - Email	14.7		11.0	18.7
Direct - real time booking over own website with availability check	11.9		7.3	15.7
Destination Marketing Organization (DMO) / trade associations	0.5	0.7	0.3	0.6
National Tourism Organization (NTO)	0.3		0.2	0.4
Tour operator / Travel agency	8.9	15.5	5.7	12.2
Hotel chains and cooperations with CRS	2.2		1.5	2.9
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		0.9	1.6
Event and Congress organizer	3.1		2.2	4.1
Online Booking Agency (OTA)	25.8	32.3	20.8	30.8
Globale Distributionssysteme (GDS)	5.9		3.6	8.6
Social Media Channels	0.6		0.4	0.8
other distribution channels	1.5	1.5	1.2	1.8

Market shares in % of overnights.

Market shares of distribution channels 2017: Ireland

Unweighted sample: n=28	Market share		confidence interval (bootstrap)	
Direct - Phone	20.4	54.1	16.0	24.5
Direct - Mail / fax	1.5		1.0	2.0
Direct - Walk-In (persons without reservation)	5.5		3.3	8.2
Direct - Contact form on own website (without availability check)	3.3		2.1	4.7
Direct - Email	10.2		7.1	13.6
Direct - real time booking over own website with availability check	13.1		10.1	16.1
Destination Marketing Organization (DMO) / trade associations	0.3	0.6	0.2	0.3
National Tourism Organization (NTO)	0.4		0.2	0.5
Tour operator / Travel agency	7.3	14.0	4.6	9.7
Hotel chains and cooperations with CRS	0.1		0.0	0.1
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.2		2.4	6.2
Event and Congress organizer	2.5		1.7	3.3
Online Booking Agency (OTA)	26.7	31.2	22.1	32.1
Globale Distributionssysteme (GDS)	3.4		2.3	4.5
Social Media Channels	1.1		0.8	1.5
other distribution channels	0.2	0.2	0.0	0.4

Market shares in % of overnights.

Market shares of distribution channels 2017: Latvia

Unweighted sample: n=37	Market share		confidence interval (bootstrap)	
Direct - Phone	11.0	32.6	7.3	14.1
Direct - Mail / fax	1.9		1.3	2.4
Direct - Walk-In (persons without reservation)	5.4		3.9	7.7
Direct - Contact form on own website (without availability check)	3.1		2.2	4.1
Direct - Email	6.9		5.1	8.9
Direct - real time booking over own website with availability check	4.3		2.6	5.9
Destination Marketing Organization (DMO) / trade associations	0.9	1.8	0.6	1.2
National Tourism Organization (NTO)	0.9		0.6	1.2
Tour operator / Travel agency	12.3	27.5	9.4	15.4
Hotel chains and cooperations with CRS	0.4		0.3	0.5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	12.6		8.8	17.0
Event and Congress organizer	2.2		1.6	2.9
Online Booking Agency (OTA)	33.7	34.9	25.9	41.0
Globale Distributionssysteme (GDS)	0.5		0.4	0.7
Social Media Channels	0.7		0.5	0.9
other distribution channels	3.2	3.2	2.8	3.6

Market shares in % of overnights.

Market shares of distribution channels 2017: Poland

Unweighted sample: n=30	Market share		confidence interval (bootstrap)	
Direct - Phone	20.2	50.0	17.0	24.6
Direct - Mail / fax	0.3		0.2	0.4
Direct - Walk-In (persons without reservation)	5.1		3.7	6.7
Direct - Contact form on own website (without availability check)	2.3		1.6	3.2
Direct - Email	17.7		13.2	22.3
Direct - real time booking over own website with availability check	4.4		2.9	6.0
Destination Marketing Organization (DMO) / trade associations	0.2	0.3	0.1	0.2
National Tourism Organization (NTO)	0.1		0.1	0.2
Tour operator / Travel agency	8.0	18.4	3.2	14.5
Hotel chains and cooperations with CRS	0.7		0.5	1.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		1.1	2.2
Event and Congress organizer	8.1		4.7	11.6
Online Booking Agency (OTA)	26.4	30.6	20.9	31.1
Globale Distributionssysteme (GDS)	3.2		2.2	4.4
Social Media Channels	0.9		0.6	1.3
other distribution channels	0.7	0.7	0.4	1.0

Market shares in % of overnights.

Market shares of distribution channels 2017: Turkey

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Unweighted sample: n=40	Market share		confidence interval (bootstrap)	
Direct - Phone	15.8	50.1	12.1	20.2
Direct - Mail / fax	5.8		4.3	7.0
Direct - Walk-In (persons without reservation)	7.0		5.6	8.4
Direct - Contact form on own website (without availability check)	2.9		2.2	3.5
Direct - Email	14.9		11.3	19.2
Direct - real time booking over own website with availability check	3.9		3.0	4.8
Destination Marketing Organization (DMO) / trade associations	2.3	3.0	1.7	2.8
National Tourism Organization (NTO)	0.7		0.5	0.8
Tour operator / Travel agency	15.4	28.5	9.8	14.5
Hotel chains and cooperations with CRS	1.8		1.3	2.2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5.6		4.3	7.0
Event and Congress organizer	5.8		3.9	7.6
Online Booking Agency (OTA)	14.8	17.4	11.2	17.8
Globale Distributionssysteme (GDS)	2.2		1.6	2.6
Social Media Channels	0.5		0.4	0.6
other distribution channels	1.0	1.0	0.7	1.3

Market shares in % of overnights.

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Market shares of distribution channels 2017: United Kingdom

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Unweighted sample: n=20	Market share		confidence interval (bootstrap)	
Direct - Phone	12.7	46.4	6.9	20.2
Direct - Mail / fax	2.8		1.8	4.1
Direct - Walk-In (persons without reservation)	3.1		1.7	5.0
Direct - Contact form on own website (without availability check)	5.2		3.3	7.5
Direct - Email	7.3		4.6	11.1
Direct - real time booking over own website with availability check	15.4		11.5	19.1
Destination Marketing Organization (DMO) / trade associations	1.6	1.7	1.0	2.2
National Tourism Organization (NTO)	0.2		0.1	0.2
Tour operator / Travel agency	4.1	10.2	2.6	5.9
Hotel chains and cooperations with CRS	3.2		2.0	4.6
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.7		1.7	3.8
Event and Congress organizer	0.3		0.2	0.4
Online Booking Agency (OTA)	37.9	41.8	29.5	48.5
Globale Distributionssysteme (GDS)	3.5		2.3	5.1
Social Media Channels	0.5		0.3	0.7
other distribution channels	0.0	0.0	0.0	0.4

Market shares in % of overnights.

Hotrec Hospitality Europe

Analysis of direct booking market shares

Source: http://www.brackenrothwell.com/services/intermediary-business

Direct booking shares by segment 2017 (overall sample Europe)

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Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	53.9%	65%	36.3%	54.0%	**55.1%**		
Star category	1*	2*	3*	4*	5*	other category	***Total***
	60.4%	60%	56%	48%	46%	59%	**53.6%**
Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	62%	59%	51%	44%	**54.9%**		
Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	58%	53%	59.6%	65%	**55.3%**		
Location of hotel	City with more than 250'000 inhabitants	City between 50'000 and 250'000 inhabitants	City between 10'000 and 50'000 inhabitants	small city (less than 10'000 inhabitants)	***Total***		
	39%	53%	59%	63%	**55.3%**		
Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	58%	44%	59%	**55.0%**			

Values highlighted in blue are significantly higher than sample average. Cells marked in red are significantly lower.

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Analysis of OTA market shares

Source: http://www.brackenrothwell.com/services/intermediary-business

OTA market shares by segment 2017 (overall sample Europe)

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Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	28.7%	20.1%	45.7%	20.8%	***27.0%***		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	25.5%	26.2%	28.7%	26.5%	18.8%	26.5%	***27.0%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	29.3%	27.5%	27.5%	23.5%	***27.1%***		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	26.3%	28.1%	16.8%	18.8%	***26.7%***		

Location of hotel	City with more than 250'000 inhabitants	City between 50'000 and 250'000 inhabitants	City between 10'000 and 50'000 inhabitants	small city (less than 10'000 inhabitants)	***Total***		
	36.4%	29.0%	25.2%	22.1%	***26.9%***		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	27.9%	26.2%	22.5%	***27.0%***			

Values highlighted in blue are significantly higher than sample average. Cells marked in red are significantly lower.

OTAs in Europe

Booking.com

Expedia

HRS

Unweighted relative market shares of major OTAs in Europe

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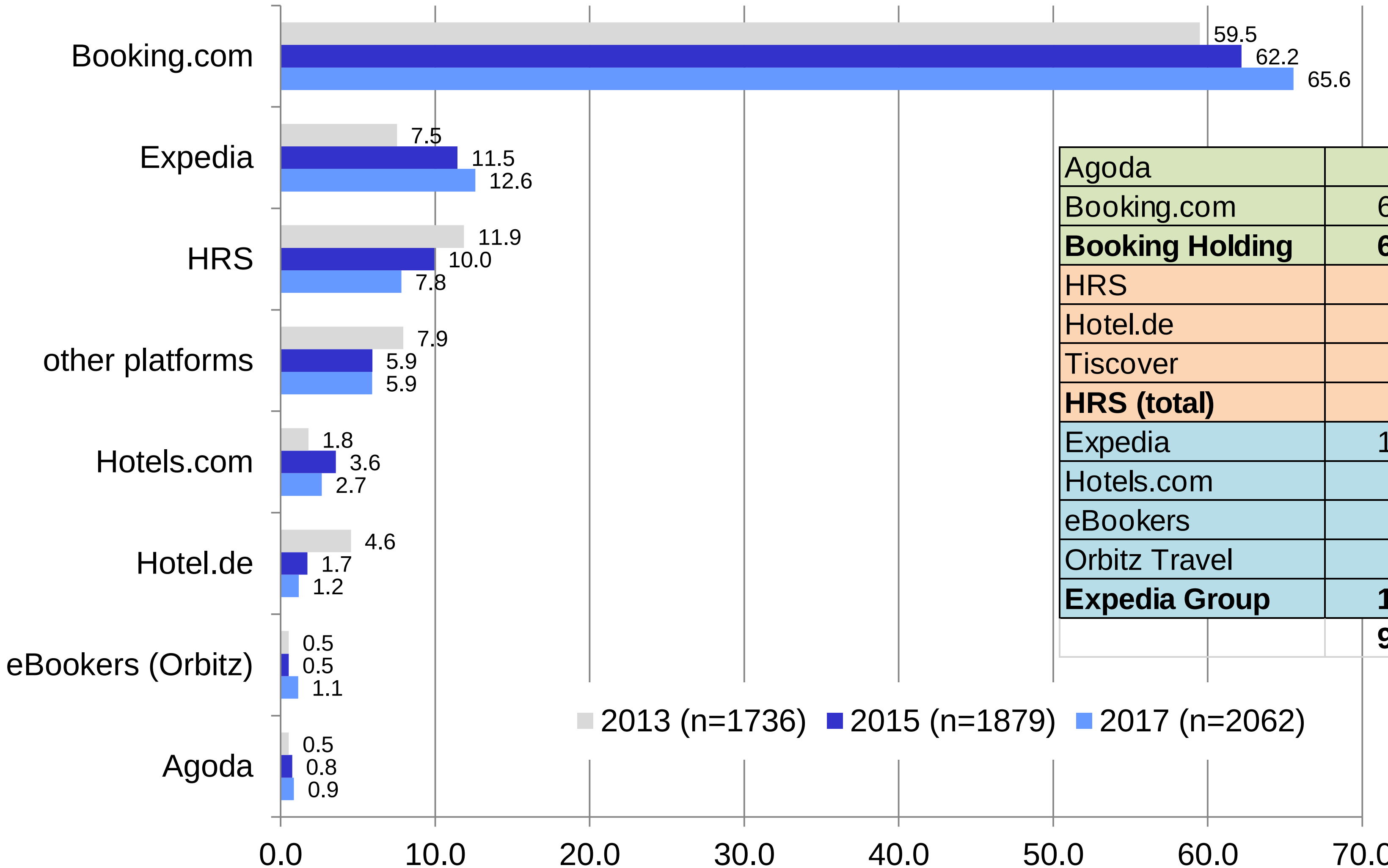

Agoda	0.86
Booking.com	65.55
Booking Holding	**66.41**
HRS	7.82
Hotel.de	1.17
Tiscover	0.04
HRS (total)	**9.03**
Expedia	12.59
Hotels.com	2.66
eBookers	1.13
Orbitz Travel	0.25
Expedia Group	**16.63**
	92.07

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Relative market shares of top 3 OTAs in selected countries

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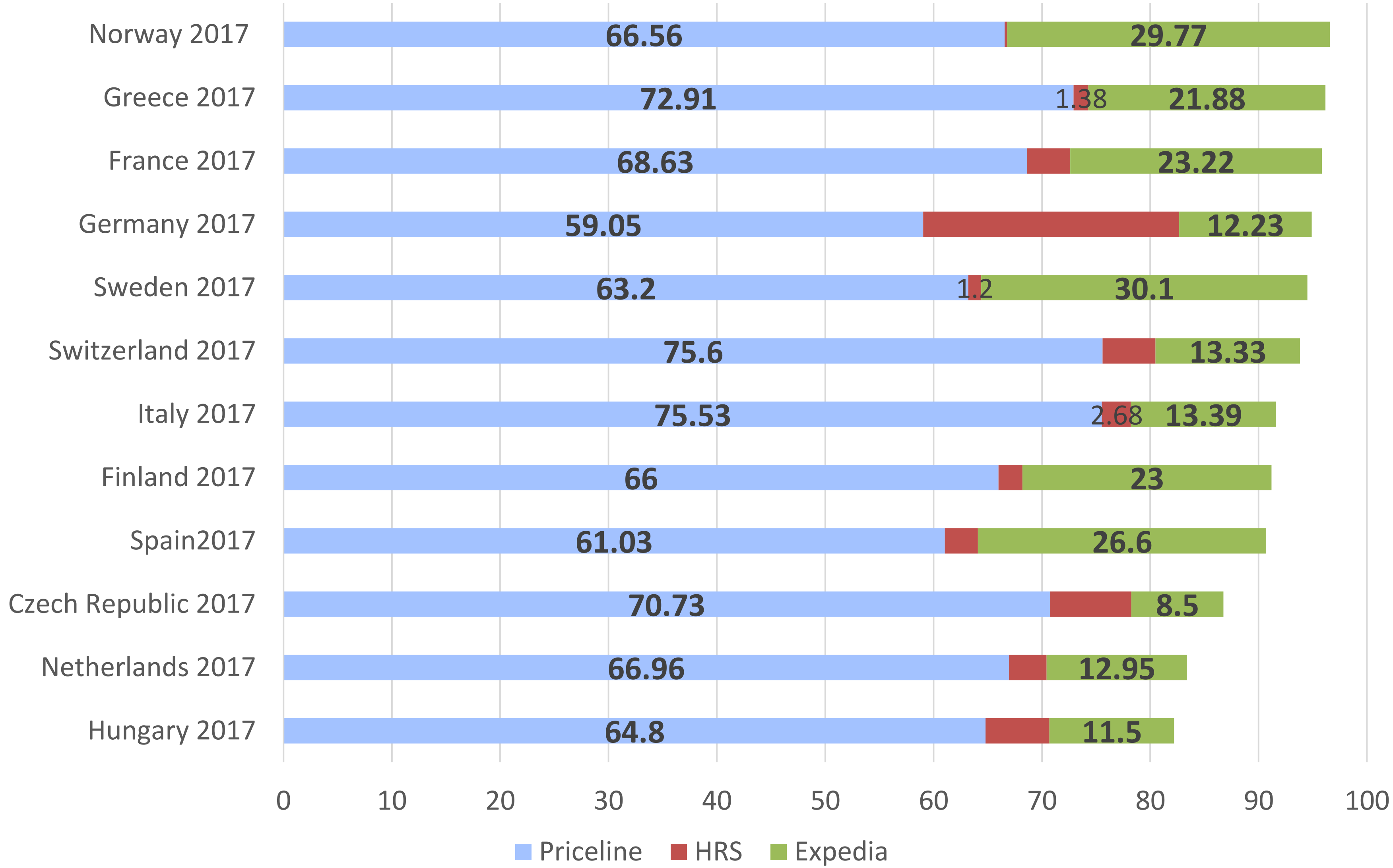

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OTA – Hotel Relationship

Booking.com

Expedia

HRS

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Do you feel pressured by OTA to accept their terms & conditions that you otherwise would not offer?

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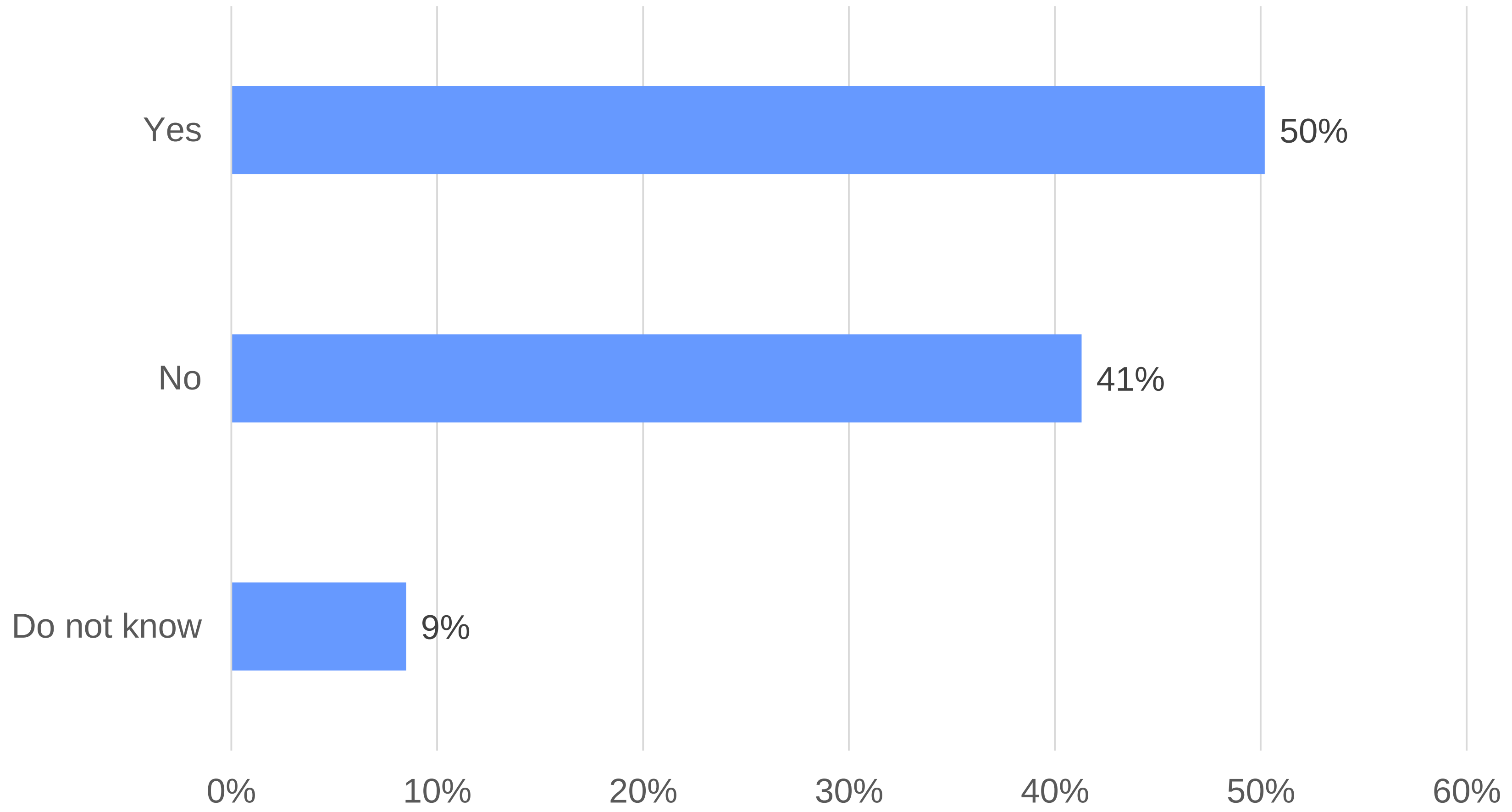


Based on unweighted (raw) sample data (n=2627).

Do you feel pressured by OTA to accept their terms & conditions that you otherwise would not offer?

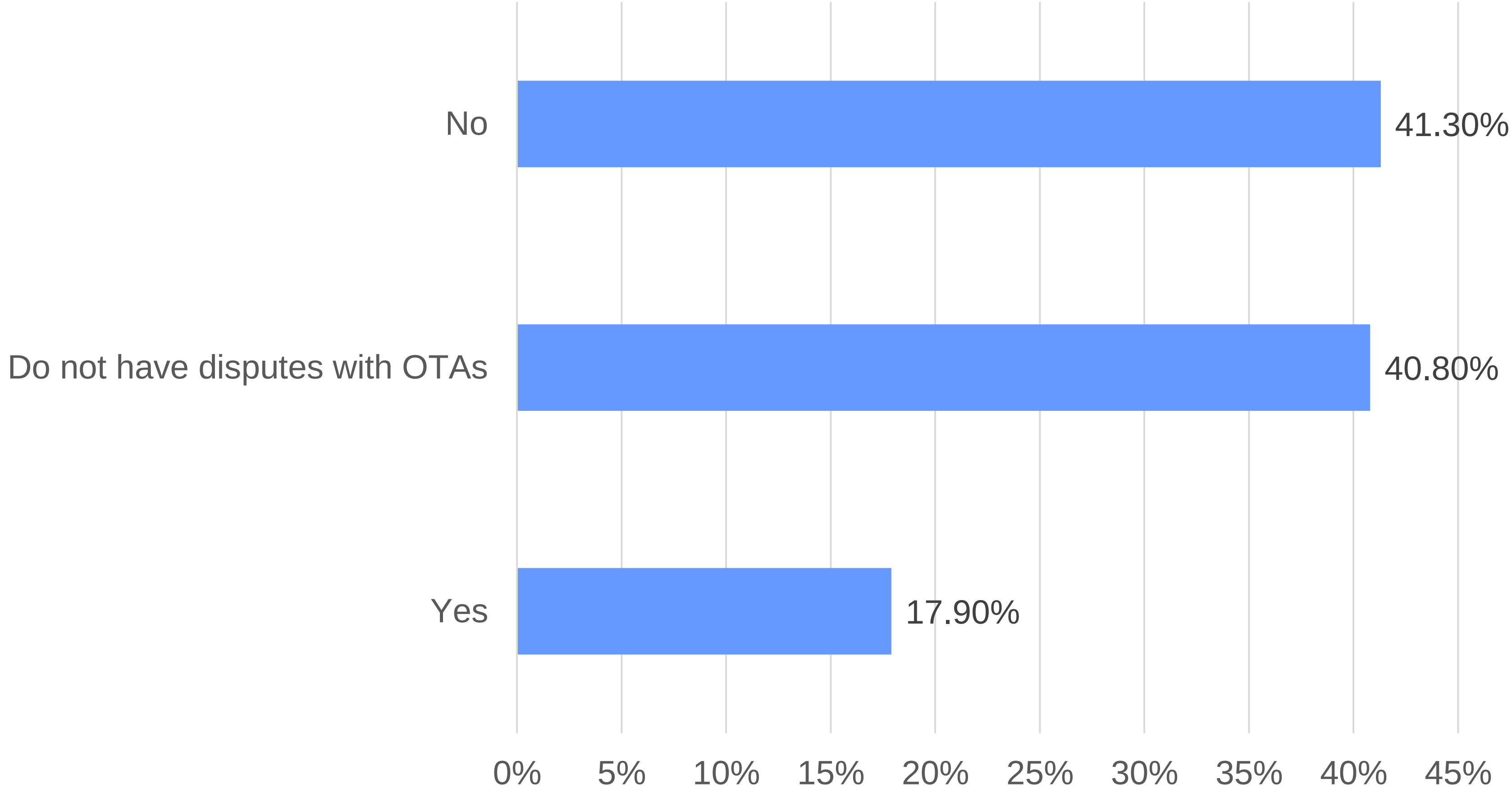
	Less than 20 rooms	From 20 to 50 rooms	50 rooms and more	Total
Yes	49.10%	52.70%	49.10%	50.30%
No	40.70%	39.00%	43.80%	41.40%
Do not know	10.20%	8.40%	7.10%	8.30%
Total	100.00%	100.00%	100.00%	

	Indep. SME hotel	Hotel chain	Hotel cooperation	Total
Yes	51.30%	45.70%	51.80%	50.30%
No	40.20%	43.70%	43.40%	41.20%
Do not know	8.60%	10.50%	4.80%	8.50%
Total	100.00%	100.00%	100.00%	

There are slight but significant differences in the perception of the pressure between independent SME or chain hotels or between small and big hotels. The proportion of hotels feeling no pressure from OTAs is larger in big hotels (more than 50 rooms) than in other size classes. Hotels belonging to a chain feel less pressured than SME hotels.

Based on unweighted (raw) sample data.

In case of a dispute with an OTA, do you consider that there is a fair and effective solution to the disagreements?



Based on unweighted (raw) sample data (n=2598).

In case of a dispute with an OTA, do you consider that there is a fair and effective solution to the disagreements?

	Less than 20 rooms	From 20 to 50 rooms	50 rooms and more	Total
Yes	12.90%	16.30%	22.00%	17.70%
No	43.30%	46.20%	36.20%	41.40%
Do not have disputes with OTAs	43.90%	37.50%	41.90%	40.90%
Total	100.00%	100.00%	100.00%	

	Indep. SME hotel	Hotel chain	Hotel cooperation	Total
Yes	16.50%	23.60%	18.00%	18.00%
No	42.10%	36.00%	45.30%	41.30%
Do not have disputes with OTAs	41.40%	40.40%	36.70%	40.70%
Total	100.00%	100.00%	100.00%	

There are strong and significant differences. The big hotels (more than 50 rooms) and chain hotels do have less problems with OTAs in case of a dispute than other categories of hotels.

Values highlighted in blue are significantly higher than sample average. Cells marked in red are significantly lower. *Based on unweighted (raw) sample data.*

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