European Hotel Distribution Study 2022

Results for the Reference Year 2021

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Executive Summary (I)

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The study

- HOTREC, the European umbrella association of hotels, restaurants and cafés, conducted between January and April 2022 in collaboration with the University of Applied Sciences of Western Switzerland Valais (HEV-SO Valais-Wallis) its biennial study on the European hotel distribution market. This is the **fifth study** since the series began in 2014.
- The objective of the study is to monitor the evolution of distribution channels within the European hotel industry with a specific focus on the role of online travel agencies (OTA).
- Results for the **(pandemic) reference year 2021**, are based on observations from nearly **3'900 hotels across Europe.**

Executive Summary (II)

Evolutions in the distribution market between 2013 and 2021

- HOTREC's distribution study shows that between 2013 and 2021, the market shares of OTAs have steadily increased in the European hotel sector from 19.7% in 2013 to 29.2% in 2019 (weighted results including data from hotel chains).
- At the same time, the share of direct bookings has decreased across Europe by over 10-percentage points from 57.6% in 2013 to 47% in 2019.
- The results for 2021 show that hotels' reliance on OTAs remained almost at the same level as 2019 during the pandemic episode, while direct bookings increased significantly. According to our results, the share of OTAs in 2021 was 28.8% while direct bookings increased to 55.2% (an 8-percentage point increase over 2019).

Executive Summary (III)

Who dominates the Online Travel Agent market?

- The 3 main players within the OTA market remain Booking Holding, Expedia Group and to a lesser extent HRS, with an aggregated market share of 90.4%.
  - Booking Holding is by far the most influential player, with a share of 71.2% in the OTA market (compared to 68.4% in 2019). The dominance of Booking has been rising over the last 8 years by more than 11-percentage points, from 60.0% in 2013 to 71.2% in 2021.
  - Expedia was unable to maintain the market share it achieved between 2015 and 2019 during the pandemic. The relative market share decreased from 16.3% in 2019 to 12.5% in 2021. This decline can be explained by Expedia's market structure, which is mainly present in luxury and business hotels in major cities that were heavily affected during the pandemic.
  - HRS has seen a steady decrease of market shares, from 16.6% in 2013 to 6.7% in 2021.

Executive Summary (IV)

The OTA – hotel relationship

- Regarding some aspects of the relations with OTAs, most hoteliers (55%) feel pressured by OTAs to accept platforms terms and conditions (e.g. regarding cancellation policy, special discounts) that hotels would otherwise voluntarily not offer. As expected, the higher the volumes of room nights generated by OTAs in a hotel, the higher the perceived pressure.
- The standard commission rate stayed the same for nearly 71% of respondents, but for a significant part of the hotels (26%) the commission rate increased.
- Nearly two third of hotels use the online payment options of Booking or Expedia and roughly every second hotel makes use of the various possibilities offered by OTAs to improve effectively the ranking.

Executive Summary (V)

Distribution Technology

- Compared to 2013, the proportion of hotels managing rates and availability manually has decreased from 56% to 37% in 2021, and the use of channel managers has increased slightly from 39% to 47% but remains at a relatively modest level.
- In 2013 nearly half of the hotels did not know the integration options with travel meta-search engines. In 2021 roughly 80% of respondents in the present survey are aware of this distribution channel which is used by 41% of hotels.
- Back in 2013 TripAdvisor was the dominant meta-search platform in the market with a usage share of 71%. In 2021, Hotel Ads by Google is the market leader (73%) followed by TripAdvisor (57%) and Trivago (44%).

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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 2020 **together with hotel associations from HOTREC member countries across Europe for the reference year 2021**.
- Similar studies have been conducted in 2014 for the **reference year 2013,** in 2016 for the **reference year 2015,** in 2018 for the **reference year 2017 and** in 2020 for the **reference year 2019.**
- The present study allows therefore to illustrate the evolution of distribution channels and players for the pre-pandemic years 2013, 2015, 2017 and 2019 as well as for the pandemic year 2021

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 and analyzed the way how hoteliers manage online distribution channels and interfaces with meta-search engines.
- The final part comprises questions covering characteristics of the hotel property (star rating, the size of the hotel in terms of rooms offered, number of overnight stays, its location, main target group, etc.)

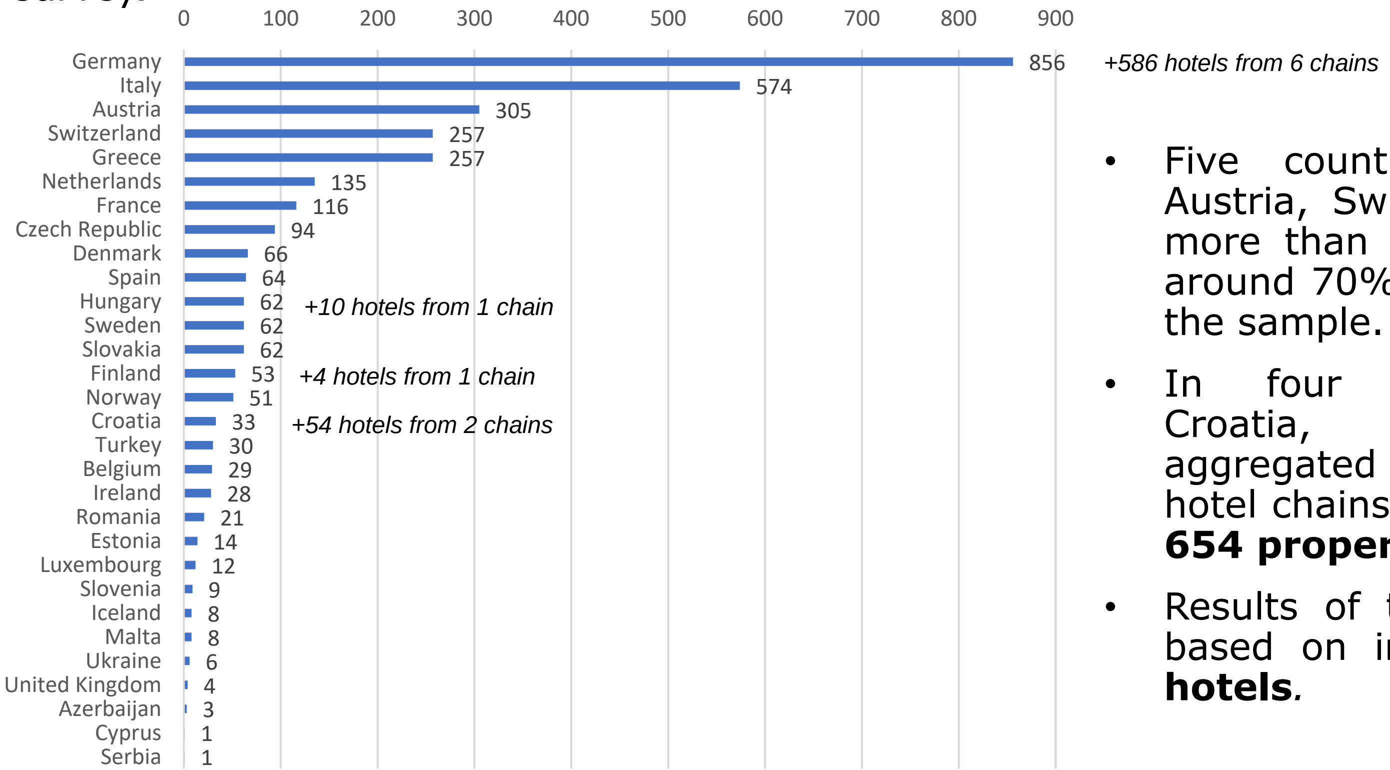
➢ See **annex** for a copy of the questionnaire

The survey administration

- The questionnaire was translated in 27 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 January to February (Switzerland) and March to beginning of April 2022 for the other European countries**. The collected data cover the **reference year 2021**. 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**.
- As not all hotels replied to all questions, the number of responses can vary from one to another question.

Methodological remarks: sampling

Overall, **3'221 responses** from individual hotels could be collected through the online survey (from 20 out of 36 countries). Yet, response rates by country vary strongly in the survey.



- Five countries (Germany, Italy, Austria, Switzerland, Greece) with more than 250 responses provide around 70% of all the responses in the sample.
- In four countries (Germany, Croatia, Finland, Hungary) aggregated information from 10 hotel chains provided data covering **654 properties**.
- Results of the study are therefor based on information from **3875 hotels**.

Summary of sample characteristics (Europe)

- Overall, the following main observations can be made regarding the sample characteristics (further details are in annex):
  - Hotel Classification – 7% of properties in the sample are classified. 3 stars (49%) and 4 stars (32%) hotels make up most of the classified hotels in the sample.
  - Size – The average size of the hotels in the sample is 30 rooms (median value), 30% of hotels have less than 20 rooms.
  - Customer segment – The leisure segment is the dominant target group for 63% of hotels, followed by business clients for 31% of properties
  - Management – Nearly 81% of hotels are individual properties whereas 11% belong to a hotel chain and 8% to a hotel cooperation.

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> Distribution channels

Market shares of distribution channels in Europe 2021: overall sample

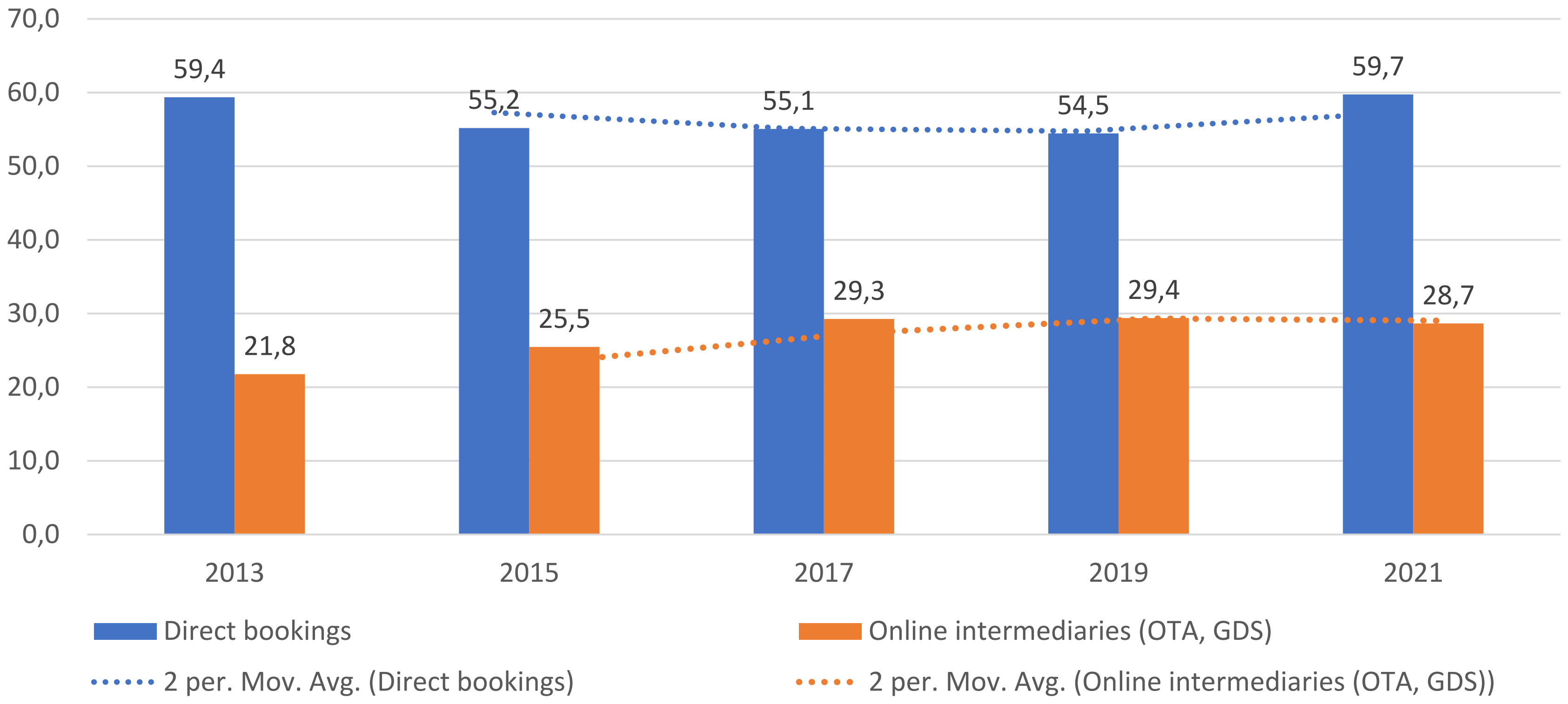
Unweighted overall sample (3'124 valid observations for the distribution channels)	Market share 2021		confidence interval	
Direct - Phone	19,7	59,7	19,0	20,3
Direct - Mail / fax	1,5		1,3	1,7
Direct - Walk-In (persons without reservation)	4,1		3,9	4,3
Direct - Contact form on own website (without availabilty check)	6,4		6,0	6,8
Direct - Email	17,4		16,8	17,9
Direct - real time booking over own website with availabilty check	10,7		10,2	11,2
Destination Marketing Organization (DMO) / trade associations	1,3	1,6	1,1	1,4
National Tourism Organization (NTO)	0,3		0,2	0,4
Tour operator / Travel agency	5,4	8,7	5,0	5,9
Hotel chains and cooperations with CRS	0,9		0,7	1,0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,2		1,0	1,3
Event and Congress organizer	1,2		1,1	1,4
Online Booking Agency (OTA)	27,1	28,7	26,3	27,9
Globale Distributionssysteme (GDS)	0,9		0,7	1,0
Social Media Channels	0,7		0,6	0,8
other distribution channels	1,4	1,4	1,1	1,6

Evolution market shares of distribution channels in Europe 2013 to 2021: overall sample

	Market share 2021 (n=3124)		Market share 2019, including data France (n=3044)		Market share 2019 (n=2166)		Market share 2017 (n=2'593)		Market share 2015 (n=2'188)		Market share 2013 (n=2'221)		DELTA (2021-2013)	
Direct - Phone	19,7	59,7	19,1	55,0	18,2	54,5	18,5	55,1	18,7	55,2	21,1	59,4	-1,4	0,4
Direct - Mail / fax	1,5		1,5		1,5		2,0		2,3		3,1		-1,6	
Direct - Walk-In (persons without reservation)	4,1		4,7		4,4		4,4		4,8		6,0		-1,9	
Direct - Contact form on own website (without availabilty check)	6,4		5,9		6,1		6,0		6,1		6,1		0,3	
Direct - Email	17,4		15,5		16,5		16,0		16,7		16,1		1,2	
Direct - real time booking over own website with availabilty check	10,7		8,3		7,8		8,2		6,8		6,9		3,8	
Destination Marketing Organization (DMO) / trade associations	1,3	1,6	0,8	1,1	0,8	1,1	0,9	1,3	0,9	1,4	1,0	1,7	0,2	-0,1
National Tourism Organization (NTO)	0,3		0,3		0,3		0,5		0,6		0,6		-0,3	
Tour operator / Travel agency	5,4	8,7	8,1	12,3	8,7	12,8	7,8	12,7	8,0	16,3	9,6	15,7	-4,2	-7,1
Hotel chains and cooperations with CRS	0,9		0,9		0,8		1,0		2,6		1,4		-0,5	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,2		1,7		1,6		1,9		2,6		2,8		-1,7	
Event and Congress organizer	1,2		1,7		1,7		1,9		3,1		1,9		-0,7	
Online Booking Agency (OTA)	27,1	28,7	27,1	29,2	27,3	29,4	26,9	29,3	22,3	25,5	19,3	21,8	**7,9**	**6,9**
Globale Distribution Systems (GDS)	0,9		1,4		1,4		1,9		2,7		2,0		-1,2	
Social Media Channels	0,7		0,7		0,7		0,5		0,5		0,5		0,2	
Other distribution channels	1,4	1,4	2,5	2,5	2,3	2,3	1,6	1,6	1,5	1,5	1,5	1,5	-0,1	-0,1

Data for France for the reference year 2019 have only been analyzed in 2021 and summarized in a separated report: Schegg, R. (2021). "*Hotel Distribution Study France. Results for the Reference Year 2019*." The European Distribution study published in 2020 did therefore not include these data yet.

Evolution of direct bookings and bookings via online intermediaries in Europe 2013 - 2021



Values from overall sample. Market shares in % of overnights.

Market shares of distribution channels in Europe 2021: <u>weighted</u> values (without aggregated data from chains)

	Rest Europe	Austria	Croatia	Czechia	Denmark	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Slovakia	Spain	Sweden	Switzerland	Weighted Values 2021		Un-weighted Values 2021	
weigthing (based on overnights 2021)	*12,7%*	*4,4%*	*1,5%*	*2,1%*	*1,1%*	*1,3%*	*11,3%*	*16,1%*	*5,3%*	*1,2%*	*15,9%*	*3,0%*	*1,6%*	*0,5%*	*16,4%*	*2,8%*	*2,8%*				
Direct - Phone	12,1	16,6	9,9	11,6	20,8	25,4	21,8	23,8	20,2	7,1	24,2	11,0	13,6	19,0	12,0	19,6	16,3	**18,1**	**56,1**	19,7	59,7
Direct - Mail / fax	2,4	0,8	2,2	0,5	0,6	0,0	1,1	1,3	0,2	0,5	2,3	5,1	2,5	1,4	2,5	0,2	0,9	**1,7**		1,5	
Direct - Walk-In (persons without reservation)	3,7	3,4	2,9	3,5	2,7	3,8	6,1	3,3	5,4	2,0	5,2	2,8	8,0	4,0	3,8	3,1	4,2	**4,2**		4,1	
Direct - Contact form on own website (without availabilty check)	4,0	9,8	1,3	11,0	2,6	4,9	4,1	6,7	4,0	4,5	7,6	2,3	7,2	7,4	3,4	3,5	7,8	**5,4**		6,4	
Direct - Email	12,8	23,8	13,1	16,3	19,4	14,7	10,7	18,1	9,0	15,2	21,4	9,1	19,4	20,2	6,5	15,7	20,4	**14,5**		17,4	
Direct - real time booking over own website with availabilty check	13,7	9,4	11,6	10,8	13,6	15,0	19,4	9,7	6,9	19,2	6,8	16,2	17,4	12,1	13,2	13,6	14,1	**12,1**		10,7	
Destination Marketing Organization (DMO) / trade associations	0,1	3,4	0,0	0,5	0,4	0,4	0,7	1,3	2,5	0,1	0,9	0,2	1,2	0,3	0,0	0,2	1,4	**0,8**	**1,1**	1,3	1,6
National Tourism Organization (NTO)	0,4	0,4	0,1	0,1	0,2	0,0	0,1	0,2	0,4	0,1	0,4	0,0	0,1	0,0	0,0	0,0	1,1	**0,2**		0,3	
Tour operator / Travel agency	7,2	3,8	18,5	6,0	5,1	1,5	3,6	2,6	19,4	4,1	5,1	2,4	6,0	3,8	12,3	3,8	2,1	**6,7**	**11,4**	5,4	8,7
Hotel chains and cooperations with CRS	2,7	0,2	1,5	0,0	3,8	0,5	1,6	0,6	0,6	3,3	0,5	1,3	0,7	0,2	1,4	4,6	0,5	**1,3**		0,9	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2,1	0,4	2,4	1,9	0,2	0,5	0,8	0,4	4,6	2,8	0,9	0,8	0,2	1,6	5,2	0,3	0,5	**1,8**		1,2	
Event and Congress organizer	3,6	0,7	3,9	2,8	0,5	2,8	0,9	1,0	0,7	2,9	0,6	1,1	0,4	2,8	2,7	0,4	1,3	**1,6**		1,2	
Online Booking Agency (OTA)	32,1	25,7	31,0	31,4	27,6	24,4	25,7	29,2	22,4	33,4	21,1	45,9	20,7	20,0	32,0	31,2	26,9	**28,2**	**30,0**	27,1	28,7
Globale Distributionssysteme (GDS)	1,7	0,2	0,6	0,4	1,4	1,4	2,0	0,8	0,2	1,2	0,6	0,6	0,6	3,8	2,3	2,3	0,6	**1,3**		0,9	
Social Media Channels	0,3	0,6	0,3	1,5	0,6	0,8	0,4	0,4	1,4	1,0	0,9	0,5	0,9	1,8	0,1	0,6	0,3	**0,5**		0,7	
other distribution channels	1,0	1,0	0,8	1,7	0,6	4,0	1,2	0,8	2,0	2,8	1,8	0,9	1,0	1,8	2,6	1,1	1,8	**1,5**	**1,5**	1,4	1,4
nbe of observations	126	299	33	90	66	51	108	830	236	62	574	131	50	60	62	61	245				

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Market shares of distribution channels in Europe 2021: weighted values (with aggregated data from chains)

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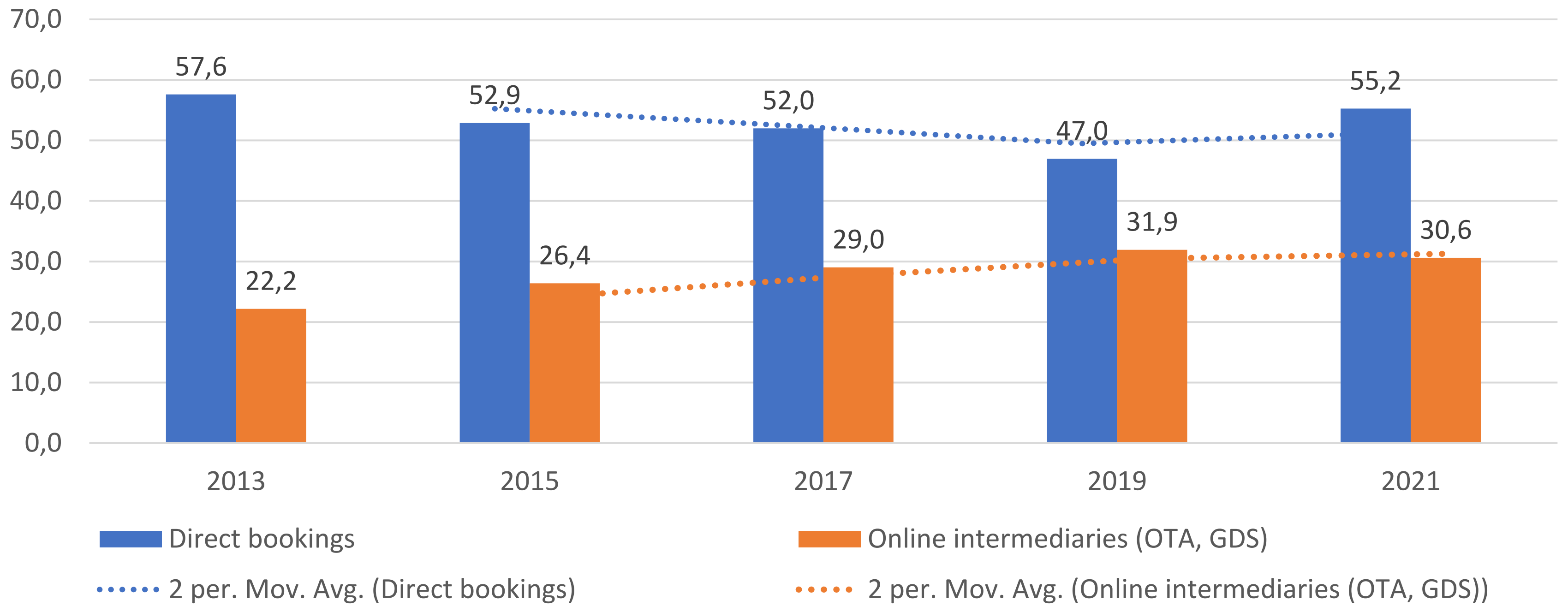
*Countries with *: data from hotel chains integrated*	Rest Europe	Austria	Croatia*	Czechia	Denmark	Finland*	France	Germany*	Greece	Hungary*	Italy	Netherlands	Norway	Slovakia	Spain	Sweden	Switzerland	**Weighted Values 2021**		Un-weighted Values 2021	
weigthing (based on overnights 2021)	*12,7%*	*4,4%*	*1,5%*	*2,1%*	*1,1%*	*1,3%*	*11,3%*	*16,1%*	*5,3%*	*1,2%*	*15,9%*	*3,0%*	*1,6%*	*0,5%*	*16,4%*	*2,8%*	*2,8%*				
Direct - Phone	12,1	16,6	12,6	11,6	20,8	24,0	21,8	21,2	20,2	7,9	24,2	11,0	13,6	19,0	12,0	19,6	16,3	**17,7**	**55,2**	18,2	54,5
Direct - Mail / fax	2,4	0,8	1,3	0,5	0,6	0,0	1,1	1,0	0,2	0,4	2,3	5,1	2,5	1,4	2,5	0,2	0,9	**1,7**		1,5	
Direct - Walk-In (persons without reservation)	3,7	3,4	2,2	3,5	2,7	3,4	6,1	4,5	5,4	1,8	5,2	2,8	8,0	4,0	3,8	3,1	4,2	**4,4**		4,4	
Direct - Contact form on own website (without availabilty check)	4,0	9,8	0,6	11,0	2,6	4,3	4,1	4,6	4,0	3,7	7,6	2,3	7,2	7,4	3,4	3,5	7,8	**5,0**		6,1	
Direct - Email	12,8	23,8	8,7	16,3	19,4	14,0	10,7	17,3	9,0	13,8	21,4	9,1	19,4	20,2	6,5	15,7	20,4	**14,3**		16,5	
Direct - real time booking over own website with availabilty check	13,7	9,4	7,9	10,8	13,6	14,7	19,4	10,3	6,9	18,4	6,8	16,2	17,4	12,1	13,2	13,6	14,1	**12,1**		7,8	
Destination Marketing Organization (DMO) / trade associations	0,1	3,4	0,0	0,5	0,4	0,4	0,7	0,8	2,5	0,1	0,9	0,2	1,2	0,3	0,0	0,2	1,4	**0,8**	**1,0**	0,8	1,1
National Tourism Organization (NTO)	0,4	0,4	0,0	0,1	0,2	0,0	0,1	0,1	0,4	0,0	0,4	0,0	0,1	0,0	0,0	0,0	1,1	**0,2**		0,3	
Tour operator / Travel agency	7,2	3,8	19,2	6,0	5,1	1,8	3,6	2,8	19,4	5,4	5,1	2,4	6,0	3,8	12,3	3,8	2,1	**6,7**	**11,5**	8,7	12,8
Hotel chains and cooperations with CRS	2,7	0,2	8,1	0,0	3,8	1,0	1,6	0,4	0,6	2,4	0,5	1,3	0,7	0,2	1,4	4,6	0,5	**1,3**		0,8	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2,1	0,4	1,7	1,9	0,2	0,6	0,8	0,5	4,6	1,9	0,9	0,8	0,2	1,6	5,2	0,3	0,5	**1,9**		1,6	
Event and Congress organizer	3,6	0,7	4,1	2,8	0,5	2,3	0,9	0,9	0,7	2,7	0,6	1,1	0,4	2,8	2,7	0,4	1,3	**1,6**		1,7	
Online Booking Agency (OTA)	32,1	25,7	28,2	31,4	27,6	28,1	25,7	32,8	22,4	34,1	21,1	45,9	20,7	20,0	32,0	31,2	26,9	**28,8**	**30,6**	27,3	29,4
Globale Distributionssysteme (GDS)	1,7	0,2	0,3	0,4	1,4	1,8	2,0	1,2	0,2	0,8	0,6	0,6	0,6	3,8	2,3	2,3	0,6	**1,3**		1,4	
Social Media Channels	0,3	0,6	1,1	1,5	0,6	0,6	0,4	0,2	1,4	0,8	0,9	0,5	0,9	1,8	0,1	0,6	0,3	**0,5**		0,7	
other distribution channels	1,0	1,0	4,1	1,7	0,6	3,0	1,2	1,2	2,0	5,6	1,8	0,9	1,0	1,8	2,6	1,1	1,8	**1,7**	**1,7**	2,3	2,3
nbe of observations	126	299	86	90	66	53	108	1258	236	69	574	131	50	60	62	61	245				

Evolution of market shares of distribution channels in Europe 2013 - 2021: weighted samples

	Weighted market share 2021		Weighted market share 2019		Weighted market share 2017		Weighted market share 2015		Weighted market share 2013		DELTA (2021-2013)	
Direct - Phone	17,7	55,2	14,5	47,0	16,5	52,0	17,2	52,9	20,5	57,6	-2,8	-2,3
Direct - Mail / fax	1,7		1,7		2,1		2,4		3,2		-1,5	
Direct - Walk-In (persons without reservation)	4,4		4,1		4,5		4,5		5,8		-1,4	
Direct - Contact form on own website (without availabilty check)	5,0		4,7		5,3		5,4		5,8		-0,8	
Direct - Email	14,3		14,2		14,6		15,6		14,9		-0,6	
Direct - real time booking over own website with availabilty check	12,1		7,6		9,0		7,7		7,4		4,7	
Destination Marketing Organization (DMO) / trade associations	0,8	1,0	0,6	0,8	0,9	1,3	0,9	1,4	1,1	1,6	-0,3	-0,6
National Tourism Organization (NTO)	0,2		0,2		0,4		0,5		0,5		-0,3	
Tour operator / Travel agency	6,7	11,5	11,3	17,6	9,5	16,3	9,1	17,9	10,3	17,2	-3,6	-5,6
Hotel chains and cooperations with CRS	1,3		0,9		1,1		2,4		1,6		-0,2	
Transhotel, etc.)	1,9		3,1		3,2		3,5		3,4		-1,6	
Event and Congress organizer	1,6		2,4		2,6		2,9		1,8		-0,2	
Online Booking Agency (OTA)	28,8	30,6	29,2	31,9	26,0	29,0	23,1	26,4	19,7	22,2	**9,1**	8,4
Globale Distributionssysteme (GDS)	1,3		2,1		2,5		2,9		2,0		-0,7	
Social Media Channels	0,5		0,7		0,5		0,4		0,4		0,1	
other distribution channels	1,7	1,7	2,7	2,7	1,4	1,4	1,4	1,4	1,5	1,5	0,1	0,1

Evolution of direct bookings and bookings via online intermediaries in Europe 2013 - 2021

During pandemic crises, increase of 8% of direct booking from 47% in 2019 to 55,2% in 2021 (nearly level of 2013), while online intermediaries remained stable.



Distribution channels for selected countries (n>100)

- Austria
- France
- Germany
- Greece
- Italy
- Netherlands
- Switzerland

Market shares of distribution channels 2021: Austria

Unweighted overall sample (299 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	16,6	63,7	14,7	18,5
Direct - Mail / fax	0,8		0,4	1,1
Direct - Walk-In (persons without reservation)	3,4		2,8	4,0
Direct - Contact form on own website (without availabilty check)	9,8		8,1	11,5
Direct - Email	23,8		21,4	26,2
Direct - real time booking over own website with availabilty check	9,4		7,6	10,4
Destination Marketing Organization (DMO) / trade associations	3,4	3,8	2,6	4,2
National Tourism Organization (NTO)	0,4		0,2	0,5
Tour operator / Travel agency	3,8	5,0	2,6	5,0
Hotel chains and cooperations with CRS	0,2		0,0	0,4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,4		0,1	0,6
Event and Congress organizer	0,7		0,3	1,1
Online Booking Agency (OTA)	25,7	26,5	22,8	28,6
Globale Distributionssysteme (GDS)	0,2		0,0	0,3
Social Media Channels	0,6		0,4	0,9
other distribution channels	1,0	1,0	0,3	1,6

Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels 2021:
Austria (comparison HOTREC with ÖHV study)

Unweighted overall sample	Market share 2021 (HOTREC study, n=299)		Market share 2021 (ÖHV study, n=153)		Combined results (weighted by number of hotels)	
Direct - Phone	16,6	63,7	15,5	68,7	16,2	65,4
Direct - Mail / fax	0,8		1,2		0,9	
Direct - Walk-In (persons without reservation)	3,4		3,0		3,3	
Direct - Contact form on own website (without availabilty check)	9,8		13,0		10,9	
Direct - Email	23,8		21,9		23,2	
Direct - real time booking over own website with availabilty check	9,4		14,1		11,0	
Destination Marketing Organization (DMO) / trade associations	3,4	3,8	1,2	1,8	2,7	3,1
National Tourism Organization (NTO)	0,4		0,6		0,4	
Tour operator / Travel agency	3,8	5,0	4,6	7,9	4,1	6,0
Hotel chains and cooperations with CRS	0,2		0,9		0,4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,4		0,4		0,4	
Event and Congress organizer	0,7		2,0		1,1	
Online Booking Agency (OTA)	25,7	26,5	18,9	20,4	23,4	24,4
Globale Distributionssysteme (GDS)	0,2		0,3		0,2	
Social Media Channels	0,6		1,3		0,8	
other distribution channels	1,0	1,0	1,2	1,2	1,1	1,1

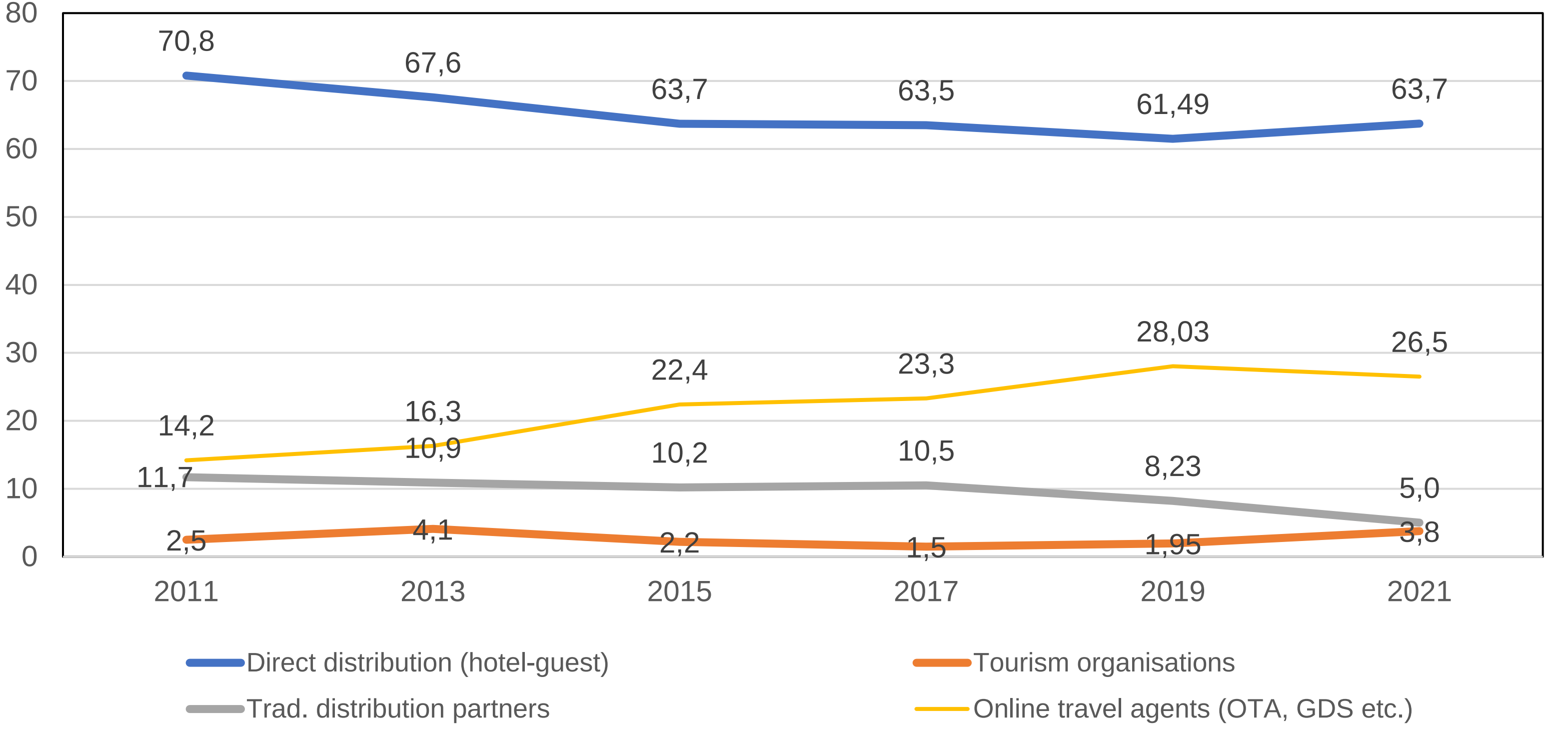
ÖHV study: Schegg (2021): Direktbuchungen während Pandemie im Aufwind. Resultate einer Online-Umfrage zur Vertriebssituation in der Hotellerie in Österreich im Jahr 2021. https://www.oehv.at/themen-recht/studien-fakten/oehv-vertriebsstudie-hotellerie/

Market shares of distribution channels in Austria: 2011-2021

Unweighted samples	Market share 2021 (n=299)		Market share 2019 (n=42)		Market share 2017 (n=32)		Market share 2015 (n=130)		Market share 2013 (n=58)		Market share 2011* (n=58)		DELTA (2021-2011)	
Direct - Phone	16,6	63,7	20,7	61,5	19,3	63,5	14,1	63,7	13,9	67,6	15,3	70,8	1,31	-7,07
Direct - Mail / fax	0,8		0,5		1,2		1,7		2,0		3,1		-2,34	
Direct - Walk-In (persons without reservation)	3,4		3,3		3,3		3,7		4,0		4,0		-0,61	
Direct - Contact form on own website (without availabilty check)	9,8		8,3		9,1		10,7		14,9		14,2		-4,39	
Direct - Email	23,8		21,8		22,0		24,7		25,6		27,6		-3,80	
Direct - real time booking over own website with availabilty check	9,4		7,0		8,6		8,8		7,2		6,6		2,76	
Destination Marketing Organization (DMO) / trade associations	3,4	3,8	1,0	2,0	1,2	1,5	1,6	2,2	3,6	4,1	2,3	2,5	1,13	1,28
National Tourism Organization (NTO)	0,4		1,0		0,3		0,6		0,5		0,2		0,15	
Tour operator / Travel agency	3,8	5,0	5,3	8,2	5,3	10,5	6,3	10,2	7,9	10,9	9,6	11,7	-5,80	-6,68
Hotel chains and cooperations with CRS	0,2		1,2		0,5		0,5		0,3		0,6		-0,42	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,4		1,3		2,4		1,3		0,9				0,37	
Event and Congress organizer	0,7		0,6		2,3		2,1		1,8		1,5		-0,83	
Online Booking Agency (OTA)	25,7	26,5	24,6	28,0	21,8	23,3	21,2	22,4	15,4	16,3	12,6	14,2	**13,11**	**12,29**
Globale Distributionssysteme (GDS)	0,2		2,9		1,4		0,8		0,4		1,2		-1,04	
Social Media Channels	0,6		0,6		0,1		0,4		0,5		0,4		0,22	
other distribution channels	1,0	1,0	0,3	0,3	1,3	1,3	1,6	1,6	1,0	1,0	1,0	1,0	-0,02	-0,02

* Data source 2011: Schegg, R. & Fux, M. (2012). Die Macht der Buchungsportale. Resultate einer Online-Umfrage zur Vertriebssituation auf den Hotelmärkten Deutschland, Österreich und Schweiz für das Jahr 2011. Studienbericht HES-SO Valais-Wallis für IHA, ÖHV & HotellerieSuisse, Siders, Schweiz. http://etourism-monitor.ch/node/77

Distribution trends in Austria: 2011-2021



Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels 2021: France

Unweighted overall sample (108 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	21,8	63,0	18,3	25,2
Direct - Mail / fax	1,1		0,2	2,0
Direct - Walk-In (persons without reservation)	6,1		4,5	7,6
Direct - Contact form on own website (without availabilty check)	4,1		1,9	6,3
Direct - Email	10,7		8,4	12,9
Direct - real time booking over own website with availabilty check	19,4		16,6	22,1
Destination Marketing Organization (DMO) / trade associations	0,7	0,8	0,2	1,2
National Tourism Organization (NTO)	0,1		0,0	0,2
Tour operator / Travel agency	3,6	7,0	1,6	5,7
Hotel chains and cooperations with CRS	1,6		0,7	2,5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,8		0,2	1,4
Event and Congress organizer	0,9		0,4	1,4
Online Booking Agency (OTA)	25,7	28,1	22,3	29,1
Globale Distributionssysteme (GDS)	2,0		1,3	2,7
Social Media Channels	0,4		0,1	0,7
other distribution channels	1,2	1,2	0,1	2,3

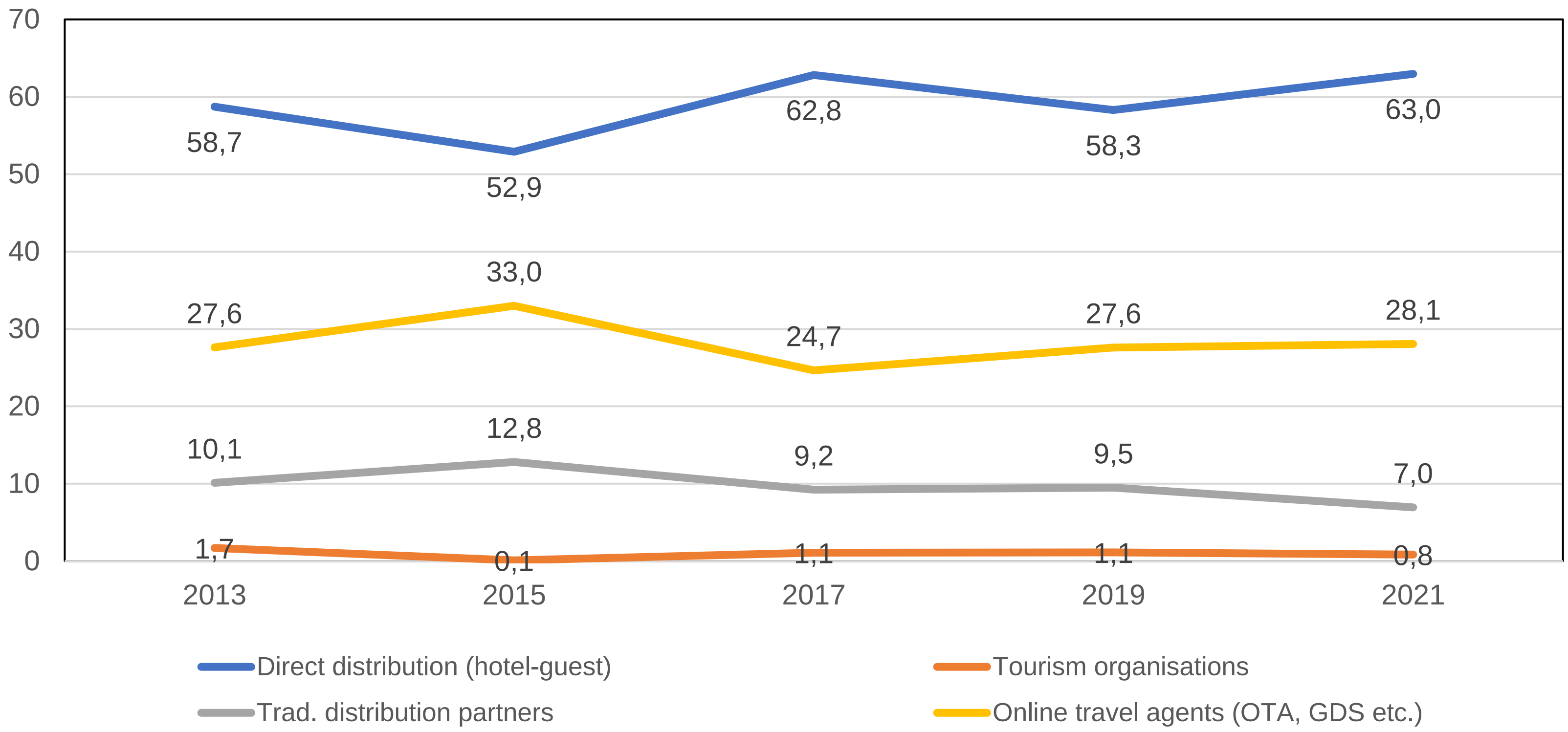
Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels in France: 2013 to 2021

Unweighted samples	Market share 2021 (n=108)		Market share 2019 (n=878)		Market share 2017 (n=158)		*Market share 2015 (n=22)*		*Market share 2013 (n=49)*		DELTA (2021-2017)	
Direct - Phone	21,8	63,0	25,0	58,3	26,3	62,8	18,9	52,9	20,9	58,7	-4,52	0,15
Direct - Mail / fax	1,1		1,7		1,6		1,9		2,3		-0,56	
Direct - Walk-In (persons without reservation)	6,1		6,3		8,5		3,5		5,2		-2,40	
Direct - Contact form on own website (without availabilty check)	4,1		4,5		3,7		2,2		3,1		0,36	
Direct - Email	10,7		8,9		10,3		14,9		16,1		0,41	
Direct - real time booking over own website with availabilty check	19,4		11,9		12,5		11,5		11,1		6,86	
Destination Marketing Organization (DMO) / trade associations	0,7	0,8	0,8	1,1	0,7	1,1	0,0	0,1	1,5	1,7	0,07	-0,25
National Tourism Organization (NTO)	0,1		0,3		0,4		0,1		0,2		-0,32	
Tour operator / Travel agency	3,6	7,0	4,2	9,5	3,8	9,2	3,7	12,8	5,9	10,1	-0,16	-2,28
Hotel chains and cooperations with CRS	1,6		2,0		2,5		0,3		1,1		-0,85	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,8		1,8		1,1		4,3		2,6		-0,36	
Event and Congress organizer	0,9		1,5		1,9		4,5		0,6		-0,91	
Online Booking Agency (OTA)	25,7	28,1	25,6	27,6	22,4	24,7	28,1	33,0	24,8	27,6	3,35	3,42
Globale Distributionssysteme (GDS)	2,0		1,6		2,0		4,7		2,6		0,02	
Social Media Channels	0,4		0,4		0,3		0,2		0,2		0,05	
other distribution channels	1,2	1,2	3,5	3,5	2,2	2,2	2,1	2,1	2,4	2,4	-1,04	-1,04

Unweighted samples, number of observations for 2013 and 2015 not sufficient for reliable results.
Market shares in % of overnights.

Distribution trends in France: 2011-2021



Unweighted samples, number of observations for 2013 (n=49) and 2015 (n=22) not sufficient for reliable results.
Market shares in % of overnights.

Market shares of distribution channels 2021: Germany

Unweighted overall sample (830 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	23,8	62,9	22,5	25,1
Direct - Mail / fax	1,3		1,0	1,6
Direct - Walk-In (persons without reservation)	3,3		3,0	3,6
Direct - Contact form on own website (without availabilty check)	6,7		5,8	7,5
Direct - Email	18,1		17,0	19,2
Direct - real time booking over own website with availabilty check	9,7		8,9	10,6
Destination Marketing Organization (DMO) / trade associations	1,3	1,5	1,0	1,7
National Tourism Organization (NTO)	0,2		0,1	0,3
Tour operator / Travel agency	2,6	4,5	2,2	3,1
Hotel chains and cooperations with CRS	0,6		0,3	0,8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,4		0,2	0,5
Event and Congress organizer	1,0		0,7	1,2
Online Booking Agency (OTA)	29,2	30,4	27,7	30,7
Globale Distributionssysteme (GDS)	0,8		0,6	1,0
Social Media Channels	0,4		0,3	0,5
other distribution channels	0,8	0,8	0,5	1,1

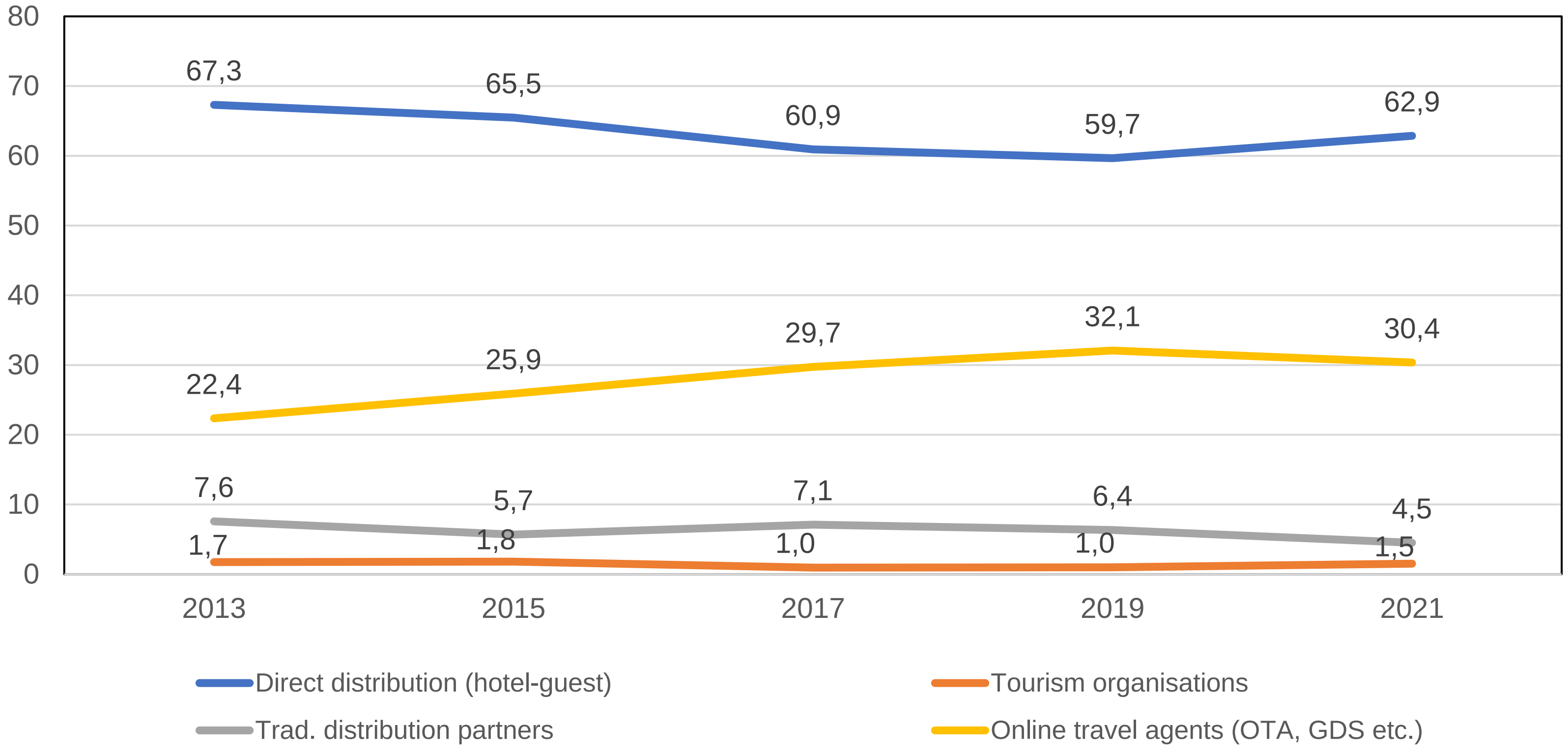
Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels in Germany: 2013 to 2021

Unweighted samples	Market share 2021 (n=830)		Market share 2019 (n=486)		Market share 2017 (n=594)		Market share 2015 (n=485)		Market share 2013 (n=575)		DELTA (2021-2013)	
Direct - Phone	23,8	62,9	21,0	59,7	22,1	60,9	26,3	65,5	27,7	67,3	-3,83	-4,45
Direct - Mail / fax	1,3		1,7		2,4		3,1		4,3		-2,96	
Direct - Walk-In (persons without reservation)	3,3		3,6		4,1		5,5		4,9		-1,66	
Direct - Contact form on own website (without availabilty check)	6,7		6,4		6,7		7,8		7,2		-0,54	
Direct - Email	18,1		18,8		17,2		16,6		17,2		0,92	
Direct - real time booking over own website with availabilty check	9,7		8,2		8,4		6,3		6,1		3,62	
Destination Marketing Organization (DMO) / trade associations	1,3	1,5	0,6	1,0	0,6	1,0	1,0	1,8	0,9	1,7	0,42	-0,22
National Tourism Organization (NTO)	0,2		0,4		0,4		0,8		0,8		-0,64	
Tour operator / Travel agency	2,6	4,5	3,3	6,4	3,9	7,1	3,4	5,7	4,4	7,6	-1,79	-3,08
Hotel chains and cooperations with CRS	0,6		0,6		1,1		0,7		0,9		-0,37	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,4		0,6		0,8		0,5		0,7		-0,33	
Event and Congress organizer	1,0		1,8		1,4		1,1		1,5		-0,59	
Online Booking Agency (OTA)	29,2	30,4	30,6	32,1	27,7	29,7	24,5	25,9	20,6	22,4	**8,62**	**8,00**
Globale Distributionssysteme (GDS)	0,8		1,0		1,7		1,1		1,6		-0,80	
Social Media Channels	0,4		0,6		0,3		0,3		0,2		0,18	
other distribution channels	0,8	0,8	0,9	0,9	1,3	1,3	1,1	1,1	1,0	1,0	-0,25	-0,25

Unweighted samples. Market shares in % of overnights.

Distribution trends in Germany: 2013 to 2021



Unweighted samples. Market shares in % of overnights.

Weighted market shares of distribution channels 2021: Germany

	SME hotels 2021 (n=679)		Chain hotels 2021 (n=583)		Weighted average	
weighting	54,2%		45,8%			
Direct - Phone	24,4	63,5	17,3	53,4	21,2	58,9
Direct - Mail / fax	1,2		0,9		1,0	
Direct - Walk-In (persons without reservation)	3,4		5,9		4,5	
Direct - Contact form on own website (without availabilty check)	7,3		1,3		4,6	
Direct - Email	18,3		16,0		17,3	
Direct - real time booking over own website with availabilty check	9,0		11,9		10,3	
Destination Marketing Organization (DMO)	1,4	1,6	0,2	0,2	0,8	0,9
National Tourism Organization (NTO)	0,2		0,0		0,1	
Tour operator / Travel agency	2,3	3,5	3,5	6,1	2,8	4,7
Hotel chains and cooperations with CRS	0,2		0,6		0,4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,2		0,9		0,5	
Event and Congress organizer	0,8		1,0		0,9	
Online Booking Agency (OTA)	29,9	30,6	36,3	38,6	32,8	34,3
Globale Distributionssysteme (GDS)	0,4		2,2		1,2	
Social Media Channels	0,4		0,1		0,2	
other distribution channels	0,8	0,8	1,7	1,7	1,2	1,2

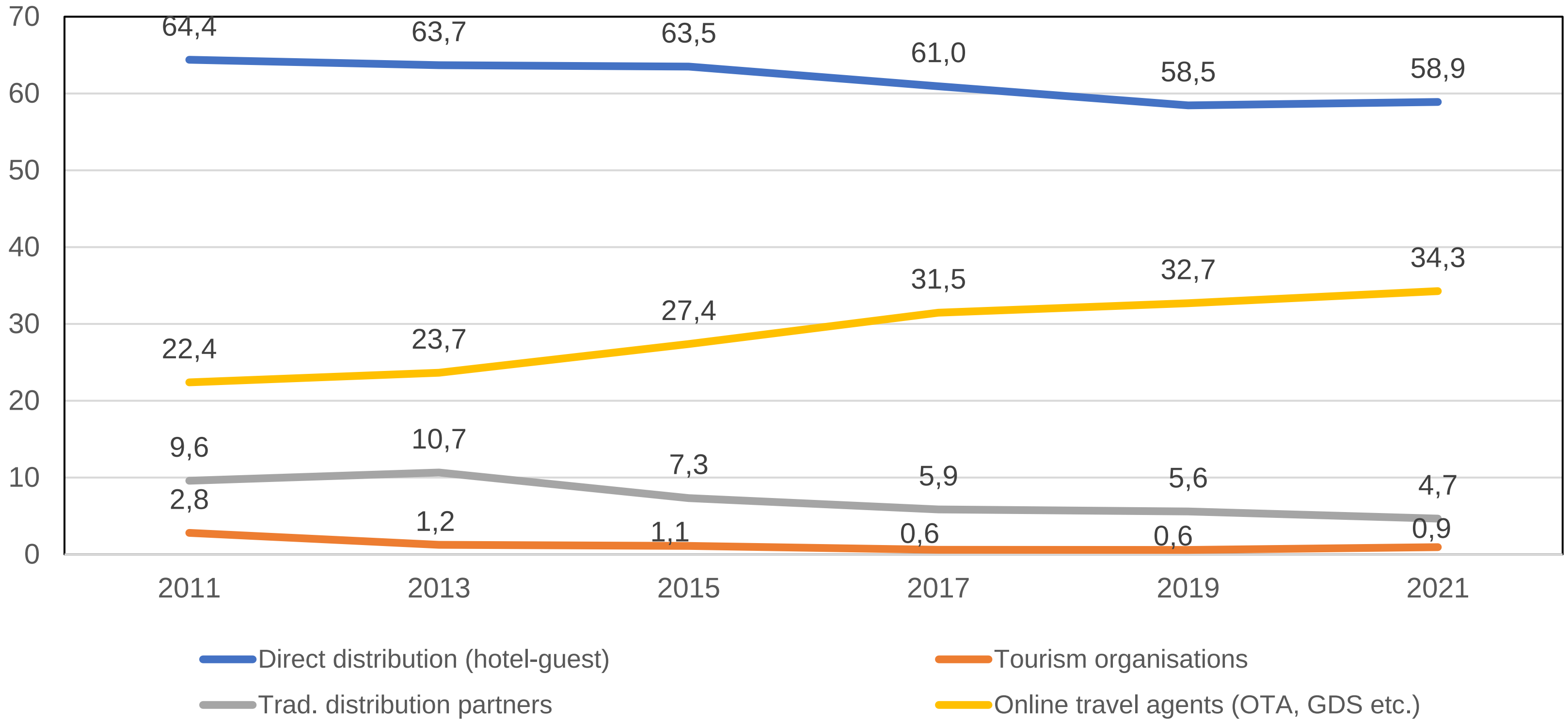
Market shares in % of overnights. Data for chain hotels from survey and from aggregated data from chains.

Weighted market shares of distribution channels in Germany: 2011 to 2021

Weighted samples	Market share 2021 (n=1262)		Market share 2019 (n=1028)		Market share 2017 (n=1038)		Market share 2015 (n=994)		Market share 2013 (n=966)		Market share 2011* (n=1406)		DELTA (2021-2011)	
Direct - Phone	21,2	58,9	19,6	58,5	20,8	61,0	22,6	63,5	55,6	63,7	25,0	64,4	-3,8	-5,5
Direct - Mail / fax	1,0		1,5		2,1		4,4				4,9		-3,9	
Direct - Walk-In (persons without reservation)	4,5		3,5		3,7		4,2				5,3		-0,8	
Direct - Contact form on own website (without availabilty check)	4,6		4,5		5,3		5,3				6,2		-1,6	
Direct - Email	17,3		20,5		18,0		18,1				17,1		0,2	
Direct - real time booking over own website with availabilty check	10,3		8,8		10,9		9,0		8,1		5,9		4,4	
Destination Marketing Organization (DMO) / trade associations	0,8	0,9	0,3	0,6	0,4	0,6	0,6	1,1	0,7	1,2	2,3	2,8	-1,5	-1,9
National Tourism Organization (NTO)	0,1		0,3		0,2		0,5		0,6		0,5		-0,4	
Tour operator / Travel agency	2,8	4,7	2,4	5,6	2,7	5,9	2,9	7,3	4,3	10,7	5,9	9,6	-3,1	-4,9
Hotel chains and cooperations with CRS	0,4		0,2		0,4		2,6		0,4		1,8		-1,4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,5		1,8		1,0		0,9		1,2		na		-0,7	
Event and Congress organizer	0,9		1,2		1,8		0,9		4,8		1,9		-1,0	
Online Booking Agency (OTA)	32,8	34,3	29,6	32,7	27,8	31,5	24,1	27,4	20,9	23,7	19,5	22,4	13,3	11,9
Globale Distributionssysteme (GDS)	1,2		2,7		3,4		3,1		2,6		2,7		-1,5	
Social Media Channels	0,2		0,3		0,3		0,2		0,2		0,2		0,0	
other distribution channels	1,2	1,2	2,6	2,6	1,1	1,1	0,7	0,7	0,7	0,7	0,9	0,9	0,3	0,3

Weighted samples (including data from hotel chains). Market shares in % of overnights. *Data source 2011: Schegg, R. & Fux, M. (2012). Die Macht der Buchungsportale. Resultate einer Online-Umfrage zur Vertriebssituation auf den Hotelmärkten Deutschland, Österreich und Schweiz für das Jahr 2011. Studienbericht HES-SO Valais-Wallis für IHA, ÖHV & HotellerieSuisse, Siders, Schweiz. http://etourism-monitor.ch/node/77

Distribution trends in Germany: 2011 to 2021



Weighted samples. Market shares in % of overnights.

Market shares of distribution channels 2021: Greece

Unweighted overall sample (236 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	20,2	45,7	17,4	23,0
Direct - Mail / fax	0,2		0,0	0,4
Direct - Walk-In (persons without reservation)	5,4		4,2	6,6
Direct - Contact form on own website (without availabilty check)	4,0		3,0	5,0
Direct - Email	9,0		7,5	10,4
Direct - real time booking over own website with availabilty check	6,9		5,5	8,3
Destination Marketing Organization (DMO) / trade associations	2,5	3,0	1,5	3,5
National Tourism Organization (NTO)	0,4		0,0	0,8
Tour operator / Travel agency	19,4	25,3	16,1	22,6
Hotel chains and cooperations with CRS	0,6		0,0	1,2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4,6		3,3	6,0
Event and Congress organizer	0,7		0,3	1,1
Online Booking Agency (OTA)	22,4	24,1	19,6	25,3
Globale Distributionssysteme (GDS)	0,2		0,0	0,4
Social Media Channels	1,4		0,8	2,1
other distribution channels	2,0	2,0	0,9	3,0

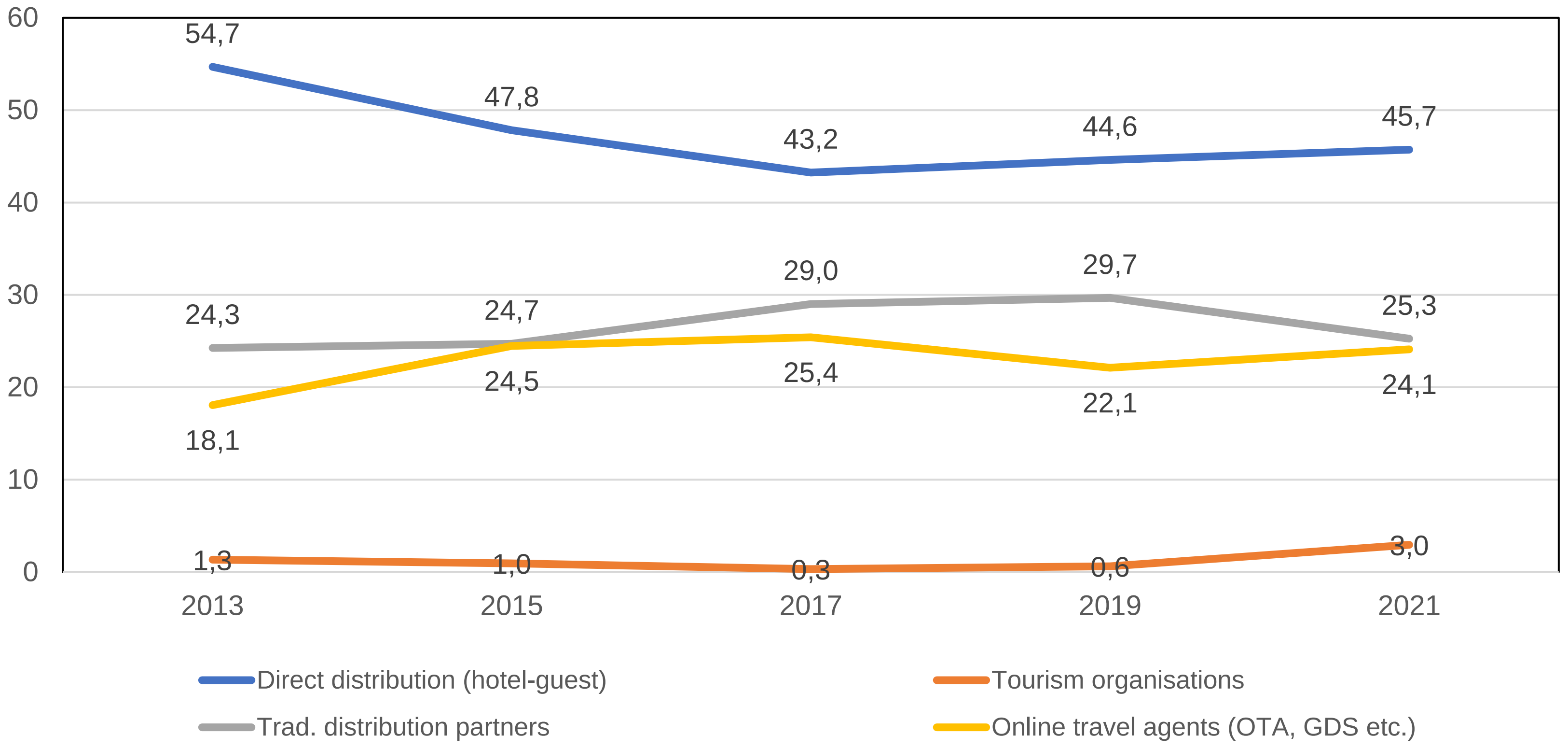
Market shares in % of overnights.

Market shares of distribution channels in Greece: 2013 to 2021

	Market share 2021 (n=236)		Market share 2019 (n=179)		Market share 2017 (n=121)		Market share 2015 (n=179)		Market share 2013 (n=266)		DELTA (2021-2013)	
Direct - Phone	20,2		19,3		17,6		18,6		22,4		-2,11	
Direct - Mail / fax	0,2		1,0		0,9		1,3		1,6		-1,39	
Direct - Walk-In (persons without reservation)	5,4		6,9		5,6		7,9		11,0		-5,57	
Direct - Contact form on own website (without availabilty check)	4,0	45,7	3,8	44,6	4,4	43,2	4,9	47,8	4,7	54,7	-0,76	-8,96
Direct - Email	9,0		8,8		8,4		9,9		9,0		0,00	
Direct - real time booking over own website with availabilty check	6,9		4,8		6,5		5,3		6,0		0,87	
Destination Marketing Organization (DMO) / trade associations	2,5	3,0	0,5	0,6	0,1	0,3	0,5	1,0	0,8	1,3	1,75	1,61
National Tourism Organization (NTO)	0,4		0,1		0,2		0,5		0,6		-0,14	
Tour operator / Travel agency	19,4		23,6		25,5		19,3		19,4		-0,08	
Hotel chains and cooperations with CRS	0,6		0,1		0,0		0,4		0,6		-0,01	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4,6	25,3	5,5	29,7	3,1	29,0	4,4	24,7	3,9	24,3	0,75	1,00
Event and Congress organizer	0,7		0,6		0,4		0,7		0,4		0,34	
Online Booking Agency (OTA)	22,4		20,4		23,6		22,9		16,3		**6,10**	
Globale Distributionssysteme (GDS)	0,2	24,1	0,9	22,1	0,8	25,4	0,7	24,5	0,5	18,1	-0,23	6,04
Social Media Channels	1,4		0,8		1,1		0,9		1,3		0,17	
other distribution channels	2,0	2,0	3,0	3,0	2,0	2,0	2,0	2,0	1,5	1,5	0,48	0,48

Unweighted samples. Market shares in % of overnights.

Distribution trends in Greece: 2013 to 2021



Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels 2021: Italy

Unweighted overall sample (574 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	24,2	67,3	22,3	26,1
Direct - Mail / fax	2,3		1,6	3,0
Direct - Walk-In (persons without reservation)	5,2		4,5	5,9
Direct - Contact form on own website (without availabilty check)	7,6		6,5	8,7
Direct - Email	21,4		19,8	23,0
Direct - real time booking over own website with availabilty check	6,8		5,8	7,8
Destination Marketing Organization (DMO) / trade associations	0,9	1,3	0,6	1,2
National Tourism Organization (NTO)	0,4		0,20	0,6
Tour operator / Travel agency	5,1	7,1	4,2	6,0
Hotel chains and cooperations with CRS	0,5		0,1	0,8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,9		0,6	1,2
Event and Congress organizer	0,6		0,4	0,8
Online Booking Agency (OTA)	21,1	22,5	19,2	23,0
Globale Distributionssysteme (GDS)	0,6		0,3	0,9
Social Media Channels	0,9		0,6	1,1
other distribution channels	1,8	1,8	1,0	2,6

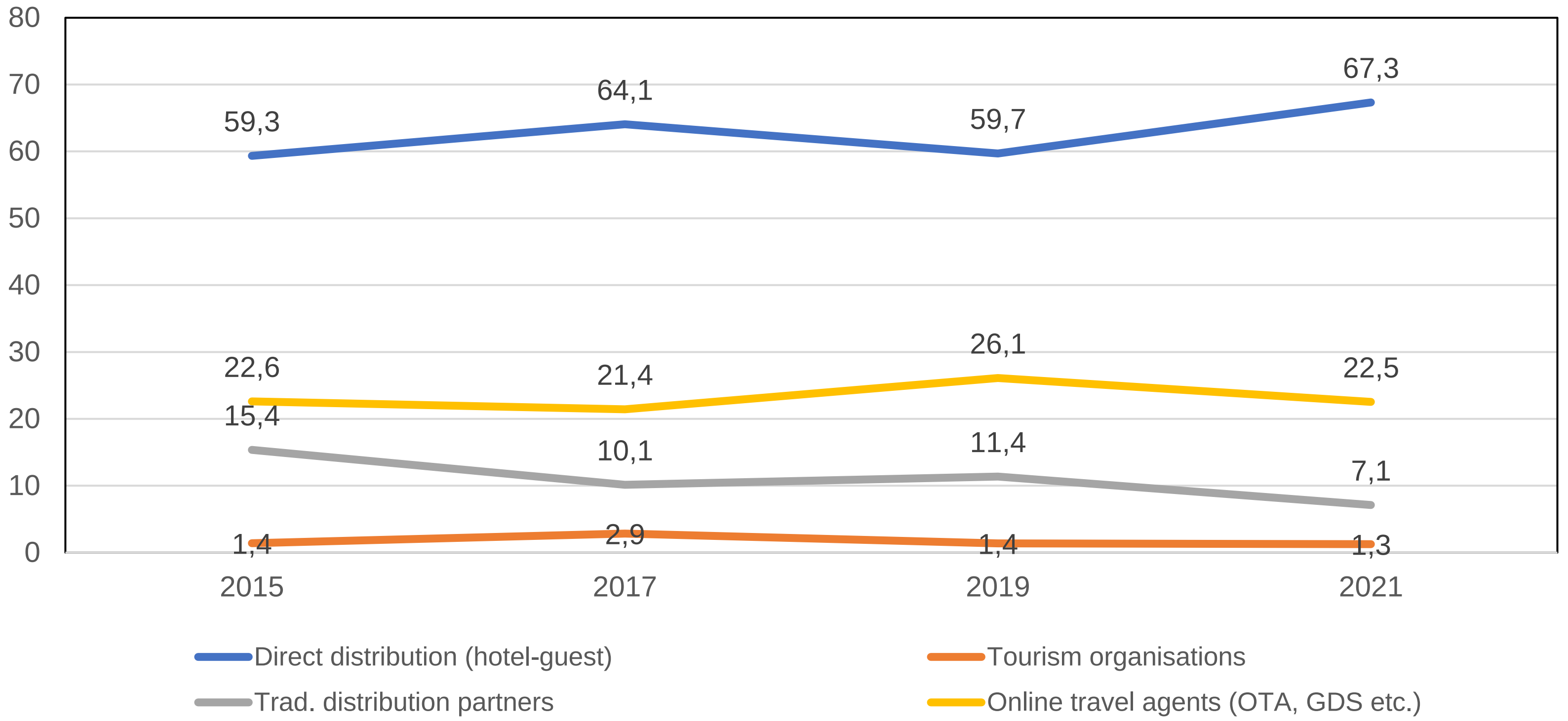
Market shares in % of overnights.

Market shares of distribution channels in Italy: 2013 to 2021

	Market share 2021 (n=574)		Market share 2019 (n=601)		Market share 2017 (n=344)		Market share 2015 (n=260)		*Market share 2013 (n=101)*		DELTA (2021-2015)	
Direct - Phone	24,2	67,3	20,5	59,7	18,1	64,1	20,4	59,3	*14,4*	*49,1*	3,78	7,99
Direct - Mail / fax	2,3		1,9		1,4		2,0		*1,7*		0,26	
Direct - Walk-In (persons without reservation)	5,2		5,6		4,3		5,1		*5,6*		0,09	
Direct - Contact form on own website (without availabilty check)	7,6		8,0		10,2		7,3		*5,0*		0,24	
Direct - Email	21,4		18,4		24,7		18,6		*16,5*		2,82	
Direct - real time booking over own website with availabilty check	6,8		5,3		5,5		6,0		*6,0*		0,80	
Destination Marketing Organization (DMO) / trade associations	0,9	1,3	1,0	1,4	1,9	2,9	0,6	1,4	*0,4*	*0,7*	0,27	-0,14
National Tourism Organization (NTO)	0,4		0,4		1,0		0,8		*0,3*		-0,41	
Tour operator / Travel agency	5,1	7,1	8,6	11,4	8,1	10,1	9,8	15,4	*10,1*	*16,3*	-4,62	-8,25
Hotel chains and cooperations with CRS	0,5		0,4		0,2		0,9		*1,2*		-0,42	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,9		1,3		1,2		2,9		*2,8*		-2,00	
Event and Congress organizer	0,6		1,1		0,6		1,8		*2,2*		-1,21	
Online Booking Agency (OTA)	21,1	22,5	24,1	26,1	20,3	21,4	20,5	22,6	*31,2*	*33,3*	0,57	-0,07
Globale Distributionssysteme (GDS)	0,6		1,1		0,3		1,6		*1,7*		-0,92	
Social Media Channels	0,9		0,9		0,9		0,6		*0,4*		0,28	
other distribution channels	1,8	1,8	1,4	1,4	1,5	1,5	1,3	1,3	*0,6*	*0,6*	0,46	0,46

Unweighted samples. Market shares in % of overnights. Survey data for the reference year 2013 had reliability issues and should be treated with care.

Distribution trends in Italy: 2015 to 2021



Unweighted samples. Market shares in % of overnights. Survey data for the reference year 2013 had reliability issues and have not been included.

Market shares of distribution channels 2021: Switzerland

Unweighted overall sample (245 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	16,3	63,6	14,6	18,0
Direct - Mail / fax	0,9		0,4	1,3
Direct - Walk-In (persons without reservation)	4,2		3,6	4,8
Direct - Contact form on own website (without availabilty check)	7,8		5,9	9,7
Direct - Email	20,4		18,4	22,4
Direct - real time booking over own website with availabilty check	14,1		12,0	16,2
Destination Marketing Organization (DMO) / trade associations	1,4	2,5	1,0	1,8
National Tourism Organization (NTO)	1,1		0.6	1,5
Tour operator / Travel agency	2,1	4,4	1,6	2,8
Hotel chains and cooperations with CRS	0,5		0,0	1,2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,5		0,3	0,8
Event and Congress organizer	1,3		0,6	1,6
Online Booking Agency (OTA)	26,9	27,7	24,1	29,6
Globale Distributionssysteme (GDS)	0,6		0,3	0,8
Social Media Channels	0,3		0,1	0,5
other distribution channels	1,8	1,8	0,4	2,2

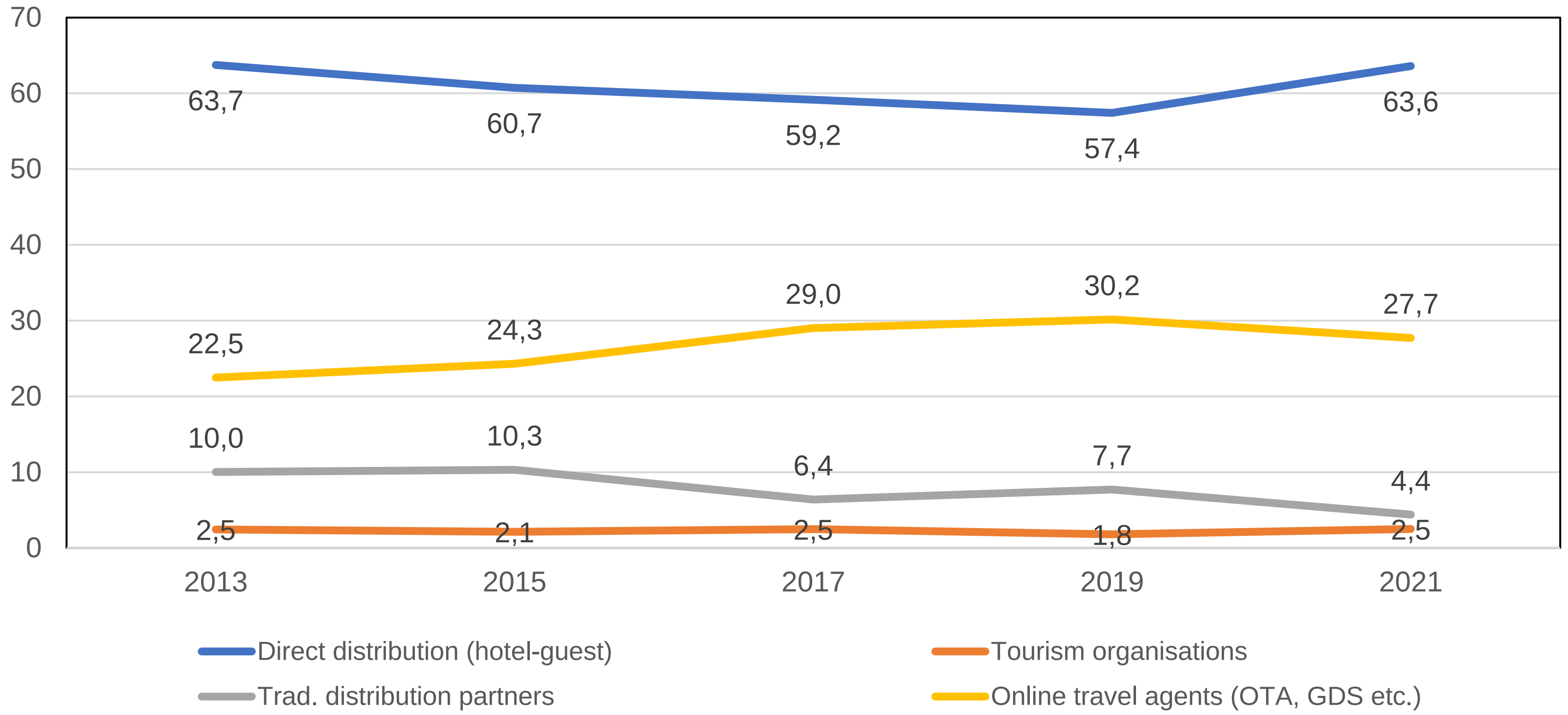
Confidence intervals are stated at the 95% level. Market shares in % of overnights.

Market shares of distribution channels in Switzerland: 2013 to 2021

	Market share 2021 (n=245)		Market share 2019 (n=284)		Market share 2017 (n=252)		Market share 2015 (n=329)		Market share 2013 (n=279)		DELTA (2013-2019)	
Direct - Phone	16,3	63,6	16,7	57,4	18,3	59,2	19,9	60,7	20,6	63,7	-3,84	-6,31
Direct - Mail / fax	0,9		1,0		1,7		2,0		2,2		-1,20	
Direct - Walk-In (persons without reservation)	4,2		4,7		5,1		4,7		5,9		-1,18	
Direct - Contact form on own website (without availabilty check)	7,8		5,2		6,9		5,0		6,4		-1,13	
Direct - Email	20,4		19,9		18,9		21,6		21,2		-1,36	
Direct - real time booking over own website with availabilty check	14,1		9,9		8,2		7,5		7,5		2,40	
Destination Marketing Organization (DMO) / trade associations	1,4	2,5	1,2	1,8	1,4	2,5	1,4	2,1	1,4	2,5	-0,14	-0,65
National Tourism Organization (NTO)	1,1		0,6		1,1		0,7		1,1		-0,51	
Tour operator / Travel agency	2,1	4,4	5,0	7,7	3,8	6,4	4,6	10,3	4,6	10,0	0,46	-2,31
Hotel chains and cooperations with CRS	0,5		0,6		0,6		1,1		1,3		-0,68	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,5		0,9		0,7		2,3		2,7		-1,74	
Event and Congress organizer	1,3		1,2		1,3		2,3		1,5		-0,35	
Online Booking Agency (OTA)	26,9	27,7	28,6	30,2	27,7	29,0	20,6	24,3	19,4	22,5	**9,24**	7,67
Globale Distributionssysteme (GDS)	0,6		1,0		1,1		3,4		2,8		-1,84	
Social Media Channels	0,3		0,6		0,2		0,4		0,3		0,27	
other distribution channels	1,8	1,8	2,9	2,9	2,9	2,9	2,5	2,5	1,3	1,3	1,61	1,61

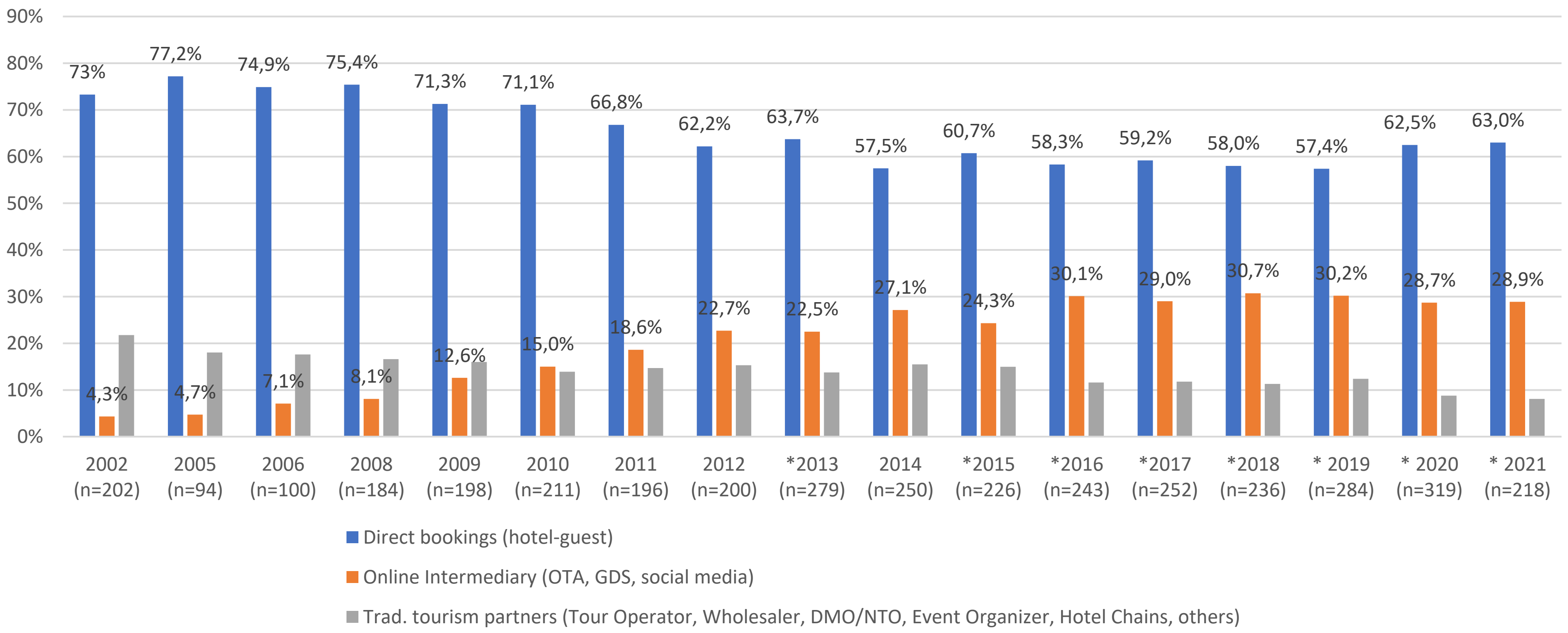
Unweighted samples. Market shares in % of overnights.

Distribution trends in Switzerland: 2013 to 2021



Unweighted sample. Market shares in % of overnights.

Distribution Trends in the Swiss Hotel Sector 2002-2021



Attention: Market shares in % of **bookings** for 2002-2012 & 2014 and in % of **overnights** in 2013 and 2015-2021 ! Source: Schegg (2022): Schweizer Hotelvertriebsstudie 2022: Direktbuchungen und auch OTAs in Schweizer Hotellerie 2021 im Aufwind. http://etourism-monitor.ch/node/192

Distribution channels for selected countries (n: 40-100)

- Croatia
- Czech Republic
- Finland
- Hungary
- Spain
- Sweden

Hotrec Hospitality Europe

Market shares of distribution channels 2021: Croatia

Hes·so // Valais Wallis

Unweighted overall sample (33 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	9,9	41,0	6,5	13,3
Direct - Mail / fax	2,2		0,7	3,7
Direct - Walk-In (persons without reservation)	2,9		2,0	3,8
Direct - Contact form on own website (without availability check)	1,3		0,0	2,6
Direct - Email	13,1		8,3	17,9
Direct - real time booking over own website with availability check	11,6		6,7	16,5
Destination Marketing Organization (DMO) / trade associations	0,0	0,1	0,0	0,1
National Tourism Organization (NTO)	0,1		0,0	0,2
Tour operator / Travel agency	18,5	26,2	12,0	25,0
Hotel chains and cooperations with CRS	1,5		0,0	4,5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2,4		0,9	3,9
Event and Congress organizer	3,9		1,3	6,5
Online Booking Agency (OTA)	31,0	31,9	23,6	38,4
Globale Distributionssysteme (GDS)	0,6		0,0	1,4
Social Media Channels	0,3		0,0	0,7
other distribution channels	0,8	0,8	0,0	1,7

Unweighted samples. Market shares in % of overnights.

Weighted market shares of distribution channels 2021: Croatia

	SME hotels 2021 (n=21)		Chain hotels 2021 (n=65)		Weighted average	
weighting	42,0%		58,0%			
Direct - Phone	9,9	41,0	13,9	27,7	12,2	33,3
Direct - Mail / fax	2,2		1,0		1,5	
Direct - Walk-In (persons without reservation)	2,9		1,7		2,2	
Direct - Contact form on own website (without availabilty check)	1,3		0,4		0,8	
Direct - Email	13,1		4,7		8,2	
Direct - real time booking over own website with availabilty check	11,6		6,0		8,4	
Destination Marketing Organization (DMO) / trade associations	0,0	0,1	0,0	0,1	0,0	0,1
National Tourism Organization (NTO)	0,1		0,1		0,1	
Tour operator / Travel agency	18,5	26,2	19,7	36,7	19,2	32,3
Hotel chains and cooperations with CRS	1,5		12,3		7,7	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2,4		0,9		1,5	
Event and Congress organizer	3,9		3,9		3,9	
Online Booking Agency (OTA)	31,0	31,9	27,0	28,8	28,7	30,1
Globale Distributionssysteme (GDS)	0,6		0,3		0,4	
Social Media Channels	0,3		1,5		1,0	
other distribution channels	0,8	0,8	6,7	6,7	4,2	4,2

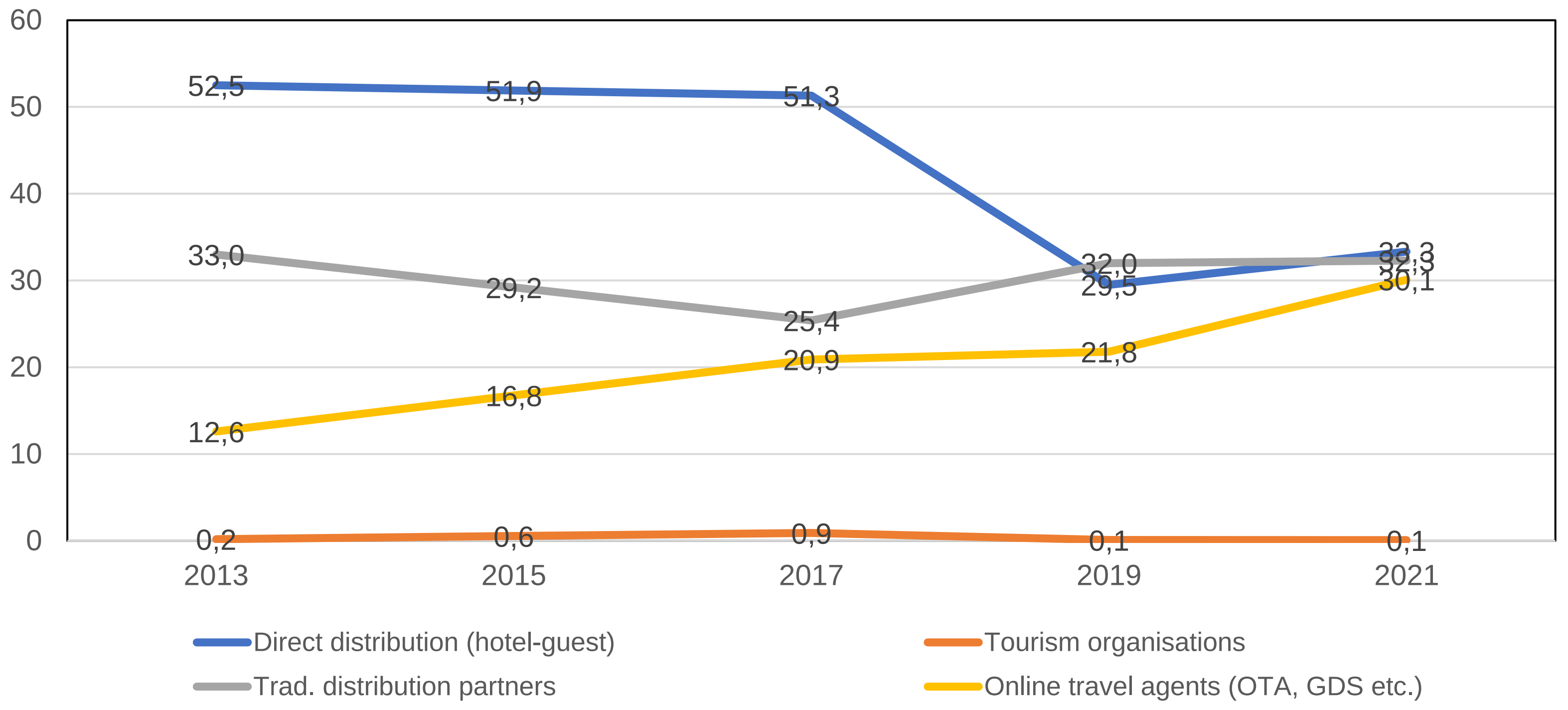
Market shares in % of overnights. Data for chain hotels from survey (n=11) and from aggregated data from 2 chains (n=54)

Market shares of distribution channels in Croatia : 2013 to 2019

Unweighted samples for years 2013 and 2017	Market share 2021 (n=86)		Market share 2019 (n=81)		Market share 2017* (n=32)		Market share 2015 (n=0)		Market share* 2013 (n=26)		DELTA (2021-2013)	
Direct - Phone	12,2	33,3	9,7	29,5	21,1	51,3	na	na	18,5	52,5	-6,3	-19,2
Direct - Mail / fax	1,5		4,0		6,7		na		5,8		-4,3	
Direct - Walk-In (persons without reservation)	2,2		1,8		3,3		na		6,4		-4,2	
Direct - Contact form on own website (without availabilty check)	0,8		0,7		2,4		na		4,2		-3,4	
Direct - Email	8,2		4,9		13,4		na		12,9		-4,7	
Direct - real time booking over own website with availabilty check	8,4		8,4		4,4		na		4,7		3,7	
Destination Marketing Organization (DMO) / trade associations	0,0	0,1	0,1	0,1	0,3	0,9	na	na	0,1	0,2	-0,1	-0,1
National Tourism Organization (NTO)	0,1		0,0		0,6		na		0,1		-0,0	
Tour operator / Travel agency	19,2	32,3	25,9	32,0	21,7	25,4	na	na	27,0	33,0	-7,8	-0,7
Hotel chains and cooperations with CRS	7,7		0,0		0,5		na		0,3		7,4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,5		1,6		1,2		na		1,6		-0,1	
Event and Congress organizer	3,9		4,5		2,0		na		4,1		-0,2	
Online Booking Agency (OTA)	28,7	30,1	20,9	21,8	19,5	20,9	na	na	11,8	12,6	16,9	17,5
Globale Distributionssysteme (GDS)	0,4		0,2		1,2		na		0,6		-0,2	
Social Media Channels	1,0		0,7		0,2		na		0,2		0,8	
other distribution channels	4,2	4,2	16,6	16,6	1,7	1,7	na	na	1,7	1,7	2,5	2,5

Unweighted (2013 & 2017) **and weighted samples** (2019 & 2021). As number of observations for unweighted raw samples are low, results have to be interpreted with caution! Market shares in % of overnights.

Distribution trends in Croatia: 2013 to 2021



Unweighted (2013 & 2017) **and weighted samples** (2019 & 2021). Market shares in % of overnights**.** As number of observations for unweighted raw samples (2013 & 2017) are low, results have to be interpreted with caution! There were no data for 2015; therefore, data in graphic represent interpolated values. Market shares in % of overnights.

Market shares of distribution channels 2021: Czech Republic

Unweighted overall sample (90 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	11,8	54,0	9,7	13,5
Direct - Mail / fax	0,5		0,0	1,0
Direct - Walk-In (persons without reservation)	3,5		2,3	4,7
Direct - Contact form on own website (without availability check)	11,0		7,7	14,3
Direct - Email	16,3		13,6	19,0
Direct - real time booking over own website with availability check	10,8		7,9	13,7
Destination Marketing Organization (DMO) / trade associations	0,5	0,6	0,1	0,9
National Tourism Organization (NTO)	0,1		0,0	0,2
Tour operator / Travel agency	6,0	10,6	3,7	8,3
Hotel chains and cooperations with CRS	0,0		na	na
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,9		0,5	3,3
Event and Congress organizer	2,8		0,8	4,8
Online Booking Agency (OTA)	31,4	33,2	26,7	36,1
Globale Distributionssysteme (GDS)	0,4		0,0	0,7
Social Media Channels	1,5		0,0	3,2
other distribution channels	1,7	1,7	0,2	3,2

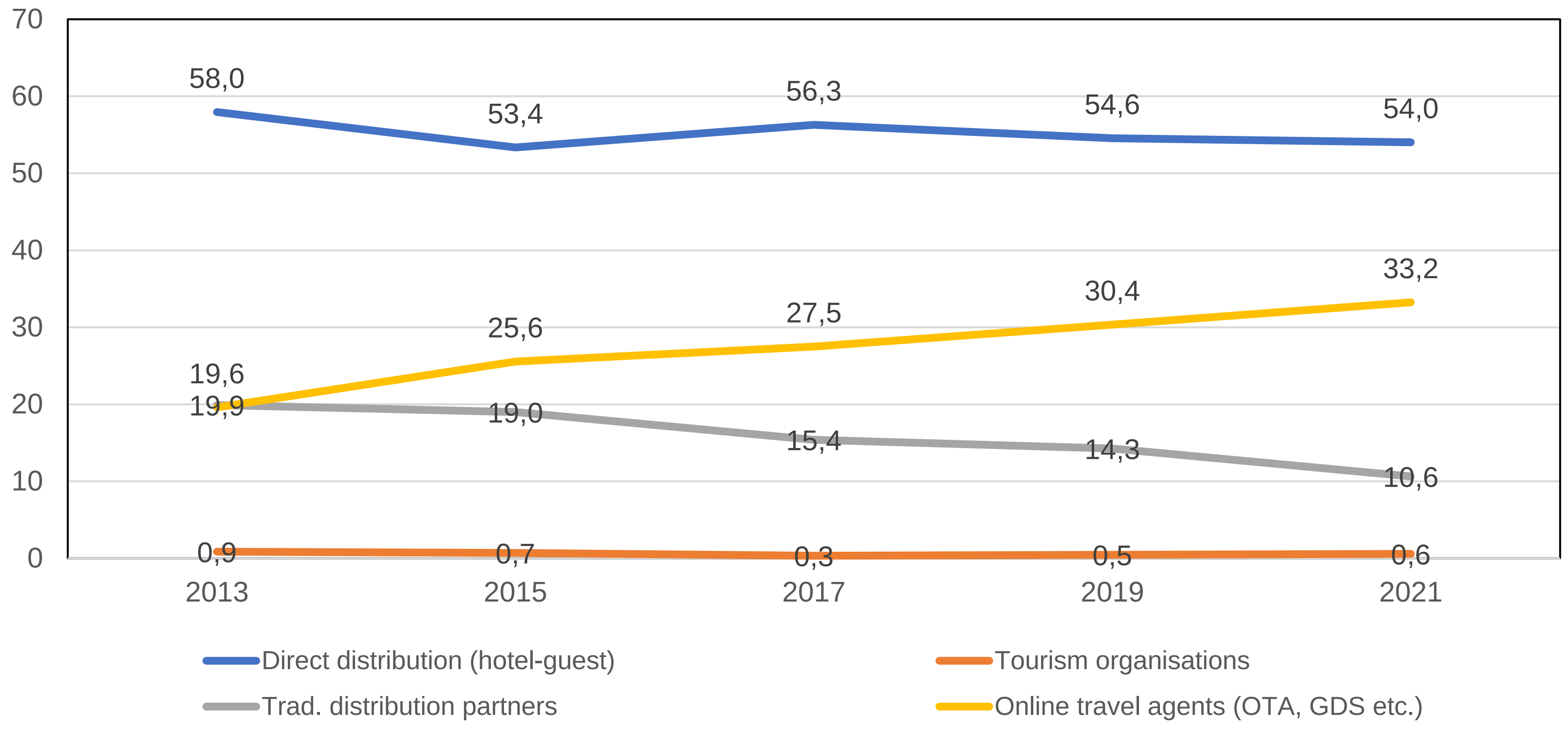
Confidence intervals are stated at the 95% level. Market shares in % of overnights.

Market shares of distribution channels in Czech Republic : 2013 to 2021

	Market share 2021 (n=90)		Market share 2019 (n=69)		Market share 2017 (n=65)		Market share 2015 (n=52)		Market share 2013 (n=82)		DELTA (2021-2013)	
Direct - Phone	11,8	54,0	14,9	54,6	15,1	56,3	12,1	53,4	17,4	58,0	-5,6	-3,9
Direct - Mail / fax	0,5		0,7		0,6		0,8		0,9		-0,5	
Direct - Walk-In (persons without reservation)	3,5		3,7		4,3		5,2		6,1		-2,5	
Direct - Contact form on own website (without availabilty check)	11,0		12,0		9,3		8,1		8,3		2,7	
Direct - Email	16,3		16,2		18,8		22,2		18,8		-2,5	
Direct - real time booking over own website with availabilty check	10,8		7,1		8,2		5,0		6,5		4,4	
Destination Marketing Organization (DMO) / trade associations	0,5	0,6	0,3	0,5	0,3	0,3	0,3	0,7	0,8	0,9	-0,3	-0,3
National Tourism Organization (NTO)	0,1		0,1		0,1		0,4		0,1		-0,0	
Tour operator / Travel agency	6,0	10,6	10,0	14,3	10,0	15,4	13,1	19,0	12,7	19,9	-6,6	-9,3
Hotel chains and cooperations with CRS	0,0		0,1		0,6		0,3		1,7		-1,7	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,9		1,7		1,6		2,0		2,0		-0,2	
Event and Congress organizer	2,8		2,4		3,2		3,6		3,6		-0,8	
Online Booking Agency (OTA)	31,4	33,2	28,7	30,4	25,6	27,5	23,7	25,6	18,1	19,6	13,3	13,7
Globale Distributionssysteme (GDS)	0,4		0,9		1,2		1,6		1,1		-0,7	
Social Media Channels	1,5		0,8		0,8		0,3		0,4		1,1	
other distribution channels	1,7	1,7	0,4	0,4	0,5	0,5	1,4	1,4	1,7	1,7	0,0	0,0

Unweighted samples. Market shares in % of overnights.

Distribution trends in Czech Republic : 2013 to 2021



Unweighted sample. Market shares in % of overnights.

Market shares of distribution channels 2021: Finland

Unweighted overall sample (51 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	25,4	63,8	19,5	31,3
Direct - Mail / fax	0,0		0,0	0,1
Direct - Walk-In (persons without reservation)	3,8		2,4	5,2
Direct - Contact form on own website (without availability check)	4,9		2,5	7,3
Direct - Email	14,7		11,4	17,9
Direct - real time booking over own website with availability check	15,0		9,5	20,5
Destination Marketing Organization (DMO) / trade associations	0,4	0,4	0,1	0,6
National Tourism Organization (NTO)	0,0		0,0	0,1
Tour operator / Travel agency	1,5	5,3	0,7	2,3
Hotel chains and cooperations with CRS	0,5		0,0	1,1
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,5		0,0	1,0
Event and Congress organizer	2,8		0,8	4,8
Online Booking Agency (OTA)	24,4	26,5	18,3	30,5
Globale Distributionssysteme (GDS)	1,4		0,4	2,3
Social Media Channels	0,8		0,3	1,4
other distribution channels	4,0	4,0	0,0	8,0

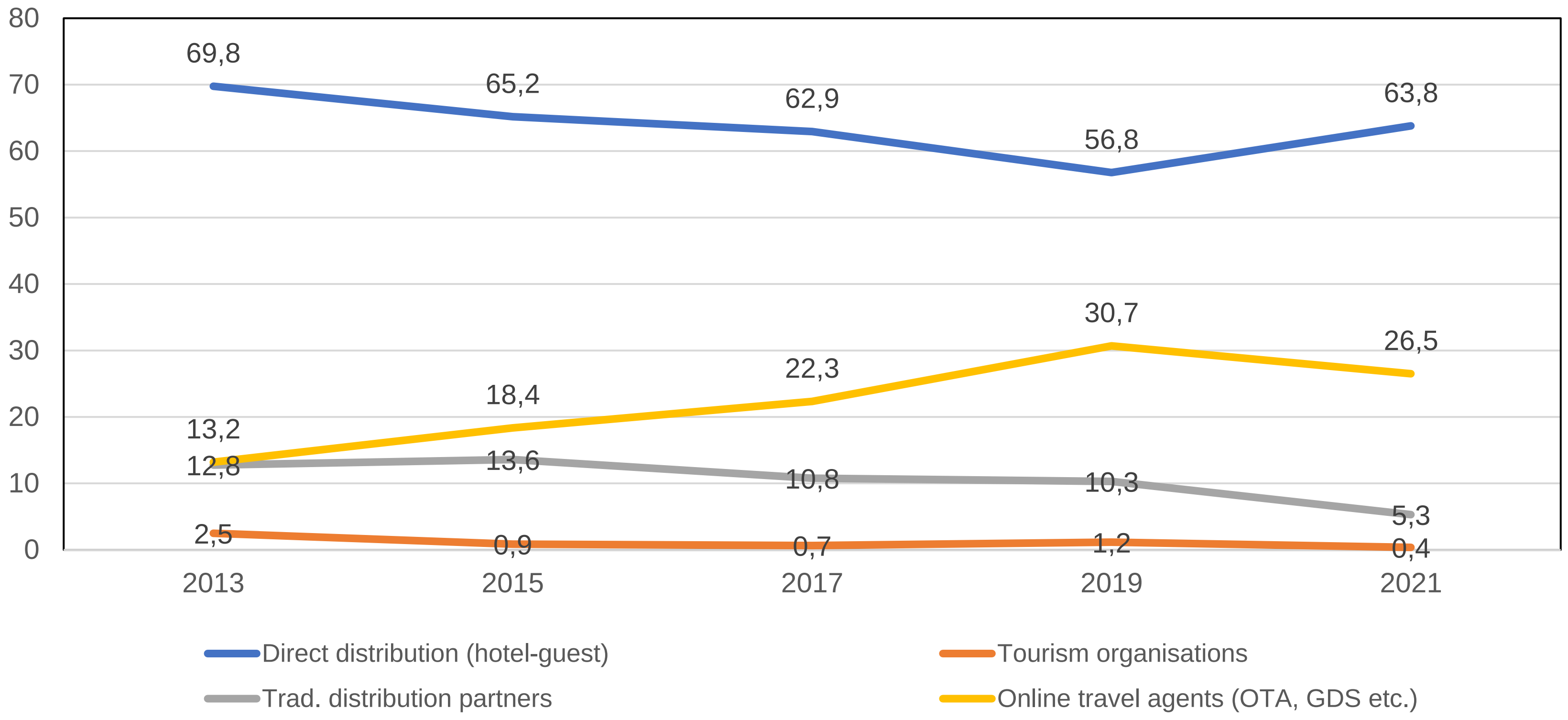
Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels in Finland : 2013 to 2021

	Market share 2021 (n=51)		Market share 2019 (n=40)		Market share 2017 (n=109)		Market share 2015 (n=50)		Market share 2013 (n=66)		DELTA (2021-2013)	
Direct - Phone	25,4	63,8	22,4	56,8	28,8	62,9	27,9	65,2	32,9	69,8	-7,5	-6,0
Direct - Mail / fax	0,0		0,0		0,2		0,6		1,0		-1,0	
Direct - Walk-In (persons without reservation)	3,8		3,9		4,3		4,9		5,0		-1,1	
Direct - Contact form on own website (without availabilty check)	4,9		4,7		5,7		6,4		5,9		-0,9	
Direct - Email	14,7		16,8		14,7		17,4		18,9		-4,3	
Direct - real time booking over own website with availabilty check	15,0		8,9		9,1		7,9		6,2		8,8	
Destination Marketing Organization (DMO) / trade associations	0,4	0,4	1,2	1,2	0,6	0,7	0,6	0,9	2,3	2,5	-2,0	-2,1
National Tourism Organization (NTO)	0,0		0,0		0,1		0,3		0,2		-0,2	
Tour operator / Travel agency	1,5	5,3	5,7	10,3	5,5	10,8	5,3	13,6	5,7	12,8	-4,2	-7,5
Hotel chains and cooperations with CRS	0,5		1,1		1,7		3,1		1,3		-0,8	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,5		1,2		1,0		1,6		2,9		-2,4	
Event and Congress organizer	2,8		2,3		2,7		3,5		2,9		-0,1	
Online Booking Agency (OTA)	24,4	26,5	28,9	30,7	19,2	22,3	16,2	18,4	11,1	13,2	13,3	13,3
Globale Distributionssysteme (GDS)	1,4		1,5		2,6		2,0		1,8		-0,5	
Social Media Channels	0,8		0,4		0,5		0,2		0,3		0,5	
other distribution channels	4,0	4,0	1,1	1,1	3,3	3,3	2,0	2,0	1,8	1,8	2,2	2,2

Unweighted samples. Market shares in % of overnights.

Distribution trends in Finland: 2013 to 2021



Unweighted samples. Market shares in % of overnights.

Weighted market shares of distribution channels 2021: Finland

	SME hotels 2021 (n=42)		Chain hotels 2021 (n=11)		Weighted average	
weighting	61,2%		38,8%			
Direct - Phone	26,4	64,4	20,2	54,1	24,0	60,4
Direct - Mail / fax	0,0		0,1		0,0	
Direct - Walk-In (persons without reservation)	4,0		2,3		3,4	
Direct - Contact form on own website (without availabilty check)	4,4		4,1		4,3	
Direct - Email	15,1		12,4		14,0	
Direct - real time booking over own website with availabilty check	14,5		15,0		14,7	
Destination Marketing Organization (DMO) / trade associations	0,4	0,4	0,3	0,4	0,4	0,4
National Tourism Organization (NTO)	0,0		0,1		0,0	
Tour operator / Travel agency	1,3	5,0	2,6	6,8	1,8	5,7
Hotel chains and cooperations with CRS	0,0		2,6		1,0	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,4		1,0		0,6	
Event and Congress organizer	3,3		0,6		2,3	
Online Booking Agency (OTA)	23,8	25,5	35,0	38,5	28,1	30,5
Globale Distributionssysteme (GDS)	0,8		3,5		1,8	
Social Media Channels	0,9		0,0		0,6	
other distribution channels	4,8	4,8	0,2	0,2	3,0	3,0

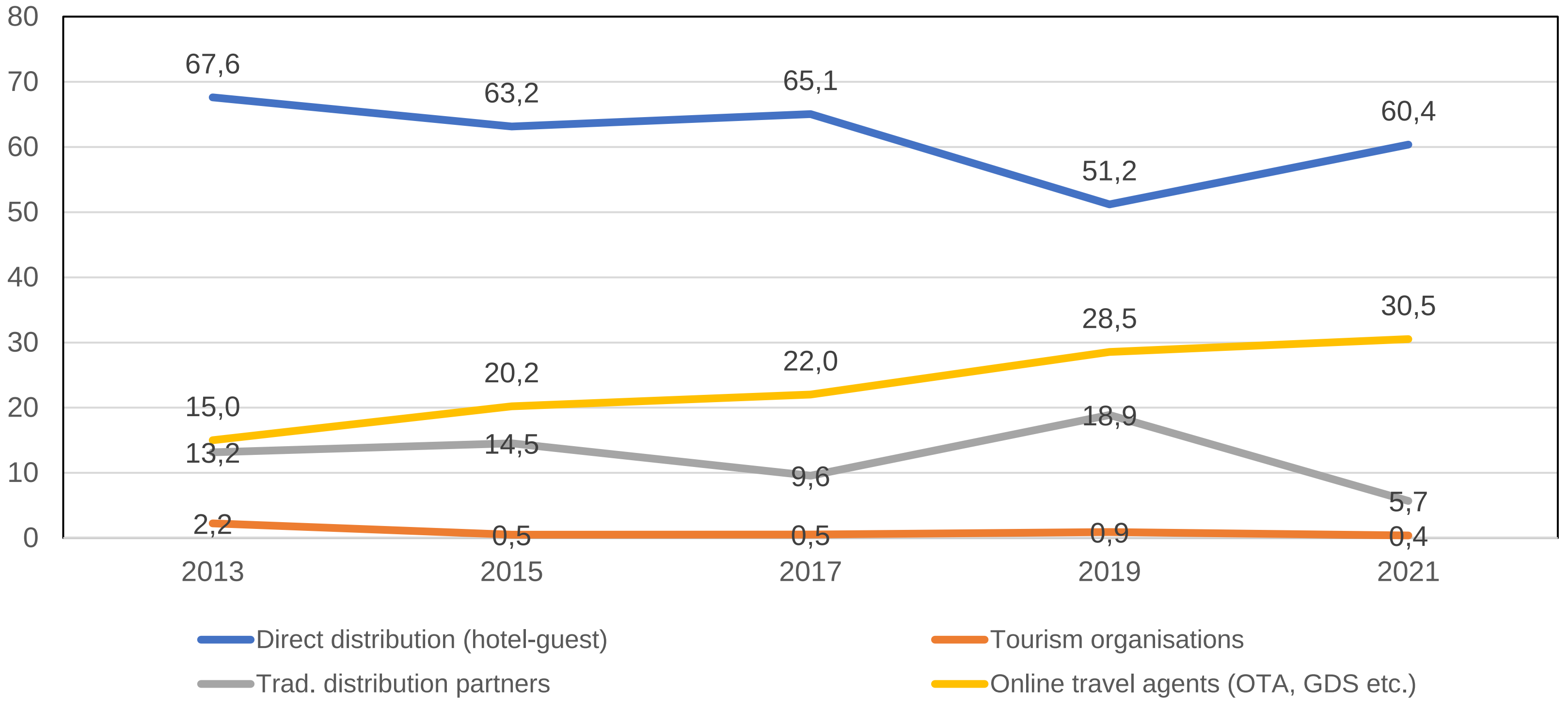
Market shares in % of overnights. Data for chain hotels from survey (n=7) and from aggregated data from 1 chain (n=4)

Weighted market shares of distribution channels in **Finland** : 2013 to 2021

	Market share 2021 (n=53)		Market share 2019 (n=91)		Market share 2017 (n=116)		Market share 2015 (n=77)		Market share 2013 (n=66)		DELTA (2021-2013)	
Direct - Phone	24,0	60,4	18,3	51,2	28,6	65,1	24,7	63,2	30,0	67,6	-6,1	-7,2
Direct - Mail / fax	0,0		0,0		0,2		0,5		1,2		-1,2	
Direct - Walk-In (persons without reservation)	3,4		3,1		4,0		4,5		5,6		-2,2	
Direct - Contact form on own website (without availabilty check)	4,3		11,7		4,9		5,5		5,2		-1,0	
Direct - Email	14,0		12,8		15,7		15,1		18,5		-4,5	
Direct - real time booking over own website with availabilty check	14,7		5,2		11,6		12,9		7,0		7,7	
Destination Marketing Organization (DMO) / trade associations	0,4	0,4	0,9	0,9	0,5	0,5	0,4	0,5	2,0	2,2	-1,6	-1,8
National Tourism Organization (NTO)	0,0		0,0		0,0		0,1		0,3		-0,2	
Tour operator / Travel agency	1,8	5,7	5,1	18,9	4,5	9,6	4,0	14,5	5,1	13,2	-3,3	-7,5
Hotel chains and cooperations with CRS	1,0		10,3		1,6		4,4		1,9		-0,9	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0,6		1,7		1,1		3,6		3,3		-2,7	
Event and Congress organizer	2,3		1,8		2,3		2,5		2,8		-0,5	
Online Booking Agency (OTA)	28,1	30,5	24,6	28,5	18,2	22,0	16,0	20,2	12,3	15,0	15,8	15,5
Globale Distributionssysteme (GDS)	1,8		3,6		3,3		4,1		2,5		-0,7	
Social Media Channels	0,6		0,3		0,5		0,1		0,2		0,4	
other distribution channels	3,0	3,0	0,5	0,5	2,9	2,9	1,6	1,6	2,0	2,0	1,0	1,0

Weighted samples. Market shares in % of overnights.

Distribution trends in Finland: 2013 to 2021



Weighted samples. Market shares in % of overnights.

Market shares of distribution channels 2021: Hungary

Unweighted overall sample (62 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	7,1	48,4	5,2	9,0
Direct - Mail / fax	0,5		0,0	1,3
Direct - Walk-In (persons without reservation)	2,0		1,3	2,7
Direct - Contact form on own website (without availability check)	4,5		1,5	7,5
Direct - Email	15,2		11,2	19,2
Direct - real time booking over own website with availability check	19,2		13,5	24,9
Destination Marketing Organization (DMO) / trade associations	0,1	0,2	0,0	0,2
National Tourism Organization (NTO)	0,05		0,0	0,1
Tour operator / Travel agency	4,1	13,0	2,7	5,5
Hotel chains and cooperations with CRS	3,3		0,8	5,8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2,8		0,4	5,2
Event and Congress organizer	2,9		1,8	4,0
Online Booking Agency (OTA)	33,4	35,6	27,1	39,7
Globale Distributionssysteme (GDS)	1,2		0,5	1,9
Social Media Channels	1,0		0,2	1,8
other distribution channels	2,8	2,8	0,2	3,8

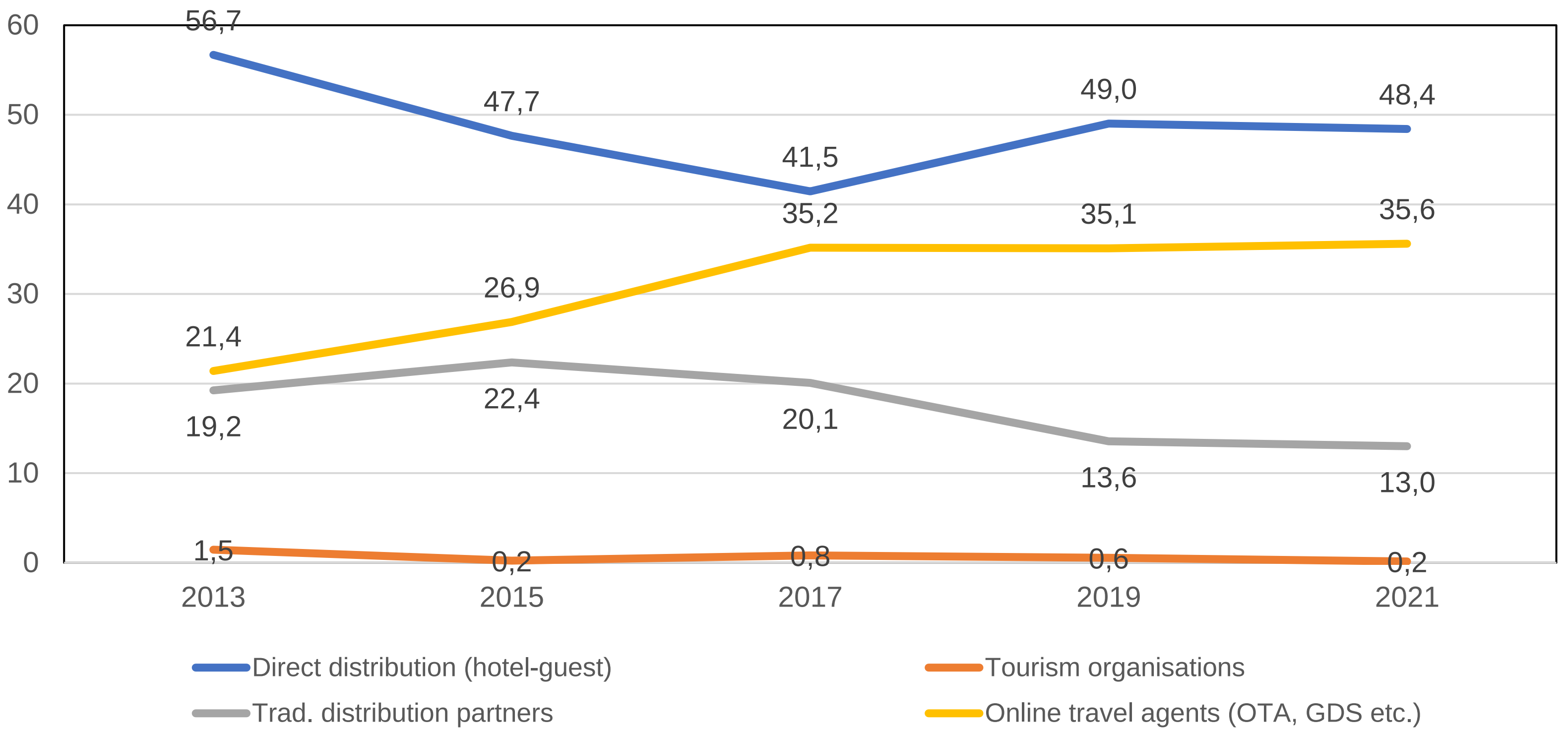
Unweighted sample. Market shares in % of overnights.

Market shares of distribution channels in Hungary: 2013 to 2021

	Market share 2021 (n=62)		Market share 2019 (n=51)		Market share 2017 (n=118)		Market share 2015 (n=78)		Market share 2013 (n=76)		DELTA (2021-2013)	
Direct - Phone	7,1	48,4	8,7	49,0	9,2	41,5	9,7	47,7	12,8	56,7	-5,7	-8,3
Direct - Mail / fax	0,5		0,6		0,5		0,6		2,4		-1,9	
Direct - Walk-In (persons without reservation)	2,0		2,3		3,3		3,1		3,5		-1,4	
Direct - Contact form on own website (without availabilty check)	4,5		8,8		6,6		11,7		11,9		-7,4	
Direct - Email	15,2		13,2		15,9		17,7		20,2		-5,0	
Direct - real time booking over own website with availabilty check	19,2		15,4		5,9		4,8		5,9		13,2	
Destination Marketing Organization (DMO) / trade associations	0,1	0,2	0,4	0,6	0,2	0,8	0,1	0,2	0,8	1,5	-0,7	-1,3
National Tourism Organization (NTO)	0,1		0,2		0,6		0,1		0,7		-0,6	
Tour operator / Travel agency	4,1	13,0	7,2	13,6	12,2	20,1	11,6	22,4	9,3	19,2	-5,2	-6,2
Hotel chains and cooperations with CRS	3,3		1,4		0,7		0,7		1,0		2,3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2,8		1,5		3,4		5,5		4,6		-1,8	
Event and Congress organizer	2,9		3,5		3,8		4,5		4,4		-1,5	
Online Booking Agency (OTA)	33,4	35,6	33,5	35,1	33,5	35,2	25,8	26,9	19,1	21,4	14,3	14,2
Globale Distributionssysteme (GDS)	1,2		0,6		1,2		0,6		1,9		-0,7	
Social Media Channels	1,0		1,0		0,5		0,6		0,4		0,6	
other distribution channels	2,8	2,8	1,8	1,8	2,5	2,5	2,9	2,9	1,2	1,2	1,6	1,6

Unweighted samples. Market shares in % of overnights.

Distribution trends in Hungary: 2013 to 2021



Unweighted samples. Market shares in % of overnights.

Weighted market shares of distribution channels 2019: Hungary

	SME hotels 2021 (n=34)		Chain hotels 2021 (n=35)		Weighted average	
weighting	50,0%		50,0%			
Direct - Phone	8,7	55,6	7,2	36,6	7,9	46,1
Direct - Mail / fax	0,9		0,0		0,4	
Direct - Walk-In (persons without reservation)	2,2		1,3		1,8	
Direct - Contact form on own website (without availabilty check)	4,5		2,9		3,7	
Direct - Email	13,7		14,0		13,8	
Direct - real time booking over own website with availabilty check	25,7		11,2		18,4	
Destination Marketing Organization (DMO) / trade associations	0,1	0,2	0,1	0,1	0,1	0,1
National Tourism Organization (NTO)	0,1		0,0		0,0	
Tour operator / Travel agency	3,6	9,4	7,2	15,5	5,4	12,5
Hotel chains and cooperations with CRS	1,6		3,2		2,4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2,5		1,4		1,9	
Event and Congress organizer	1,8		3,7		2,7	
Online Booking Agency (OTA)	29,8	31,6	38,3	39,7	34,1	35,6
Globale Distributionssysteme (GDS)	0,2		1,4		0,8	
Social Media Channels	1,5		0,0		0,8	
other distribution channels	3,2	3,2	8,1	8,1	5,7	5,7

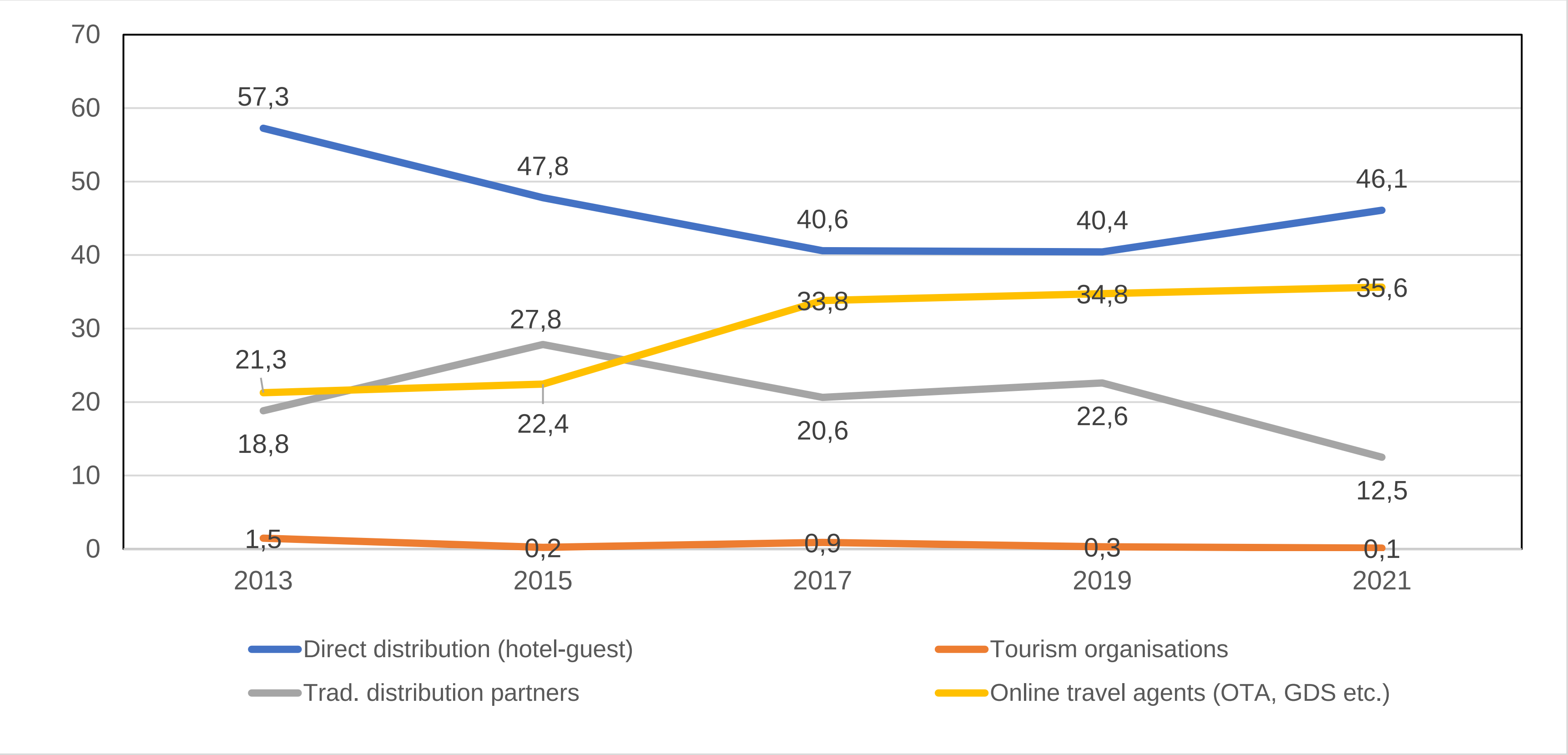
Market shares in % of overnights. Data for chain hotels from survey (n=25) and from aggregated data from 1 chain (n=10)

Weighted market shares of distribution channels in **Hungary**: 2013 to 2021

	Market share 2021 (n=69)		Market share 2019 (n=77)		Market share 2017 (n=130)		Market share 2015 (n=98)		Market share 2013 (n=75)		DELTA (2021-2013)	
Direct - Phone	7,9	46,1	7,1	40,4	9,2	40,6	9,0	47,8	13,0	57,3	-5,1	-16,0
Direct - Mail / fax	0,4		0,4		0,5		0,4		2,5		-2,1	
Direct - Walk-In (persons without reservation)	1,8		1,7		3,4		3,0		3,5		-1,7	
Direct - Contact form on own website (without availabilty check)	3,7		6,5		6,2		12,0		12,0		-5,5	
Direct - Email	13,8		13,0		15,5		18,5		20,4		-7,4	
Direct - real time booking over own website with availabilty check	18,4		11,8		5,8		4,9		5,9		5,9	
Destination Marketing Organization (DMO) / trade associations	0,1	0,1	0,2	0,3	0,2	0,9	0,1	0,2	0,8	1,5	-0,6	-1,2
National Tourism Organization (NTO)	0,0		0,1		0,7		0,1		0,7		-0,6	
Tour operator / Travel agency	5,4	12,5	17,6	22,6	13,7	20,6	15,4	27,8	9,1	18,8	8,5	3,8
Hotel chains and cooperations with CRS	2,4		0,9		0,6		1,4		0,9		-0,1	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,9		1,5		2,9		4,0		4,5		-3,0	
Event and Congress organizer	2,7		2,6		3,4		6,9		4,3		-1,7	
Online Booking Agency (OTA)	34,1	35,6	33,5	34,8	32,3	33,8	21,3	22,4	19,0	21,3	**14,5**	13,5
Globale Distributionssysteme (GDS)	0,8		0,6		1,1		0,5		1,9		-1,3	
Social Media Channels	0,8		0,7		0,4		0,6		0,4		0,3	
other distribution channels	5,7	5,7	2,0	2,0	4,1	4,1	1,7	1,7	1,2	1,2	0,7	0,7

Weighted samples. Market shares in % of overnights.

Distribution trends in Hungary: 2013 to 2021



Weighted samples. Market shares in % of overnights**.**

Market shares of distribution channels 2021: Spain

Unweighted overall sample (62 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	12,0	41,3	8,6	15,4
Direct - Mail / fax	2,5		0,7	4,3
Direct - Walk-In (persons without reservation)	3,8		2,5	5,1
Direct - Contact form on own website (without availability check)	3,4		1,1	5,7
Direct - Email	6,5		3,8	9,2
Direct - real time booking over own website with availability check	13,2		10,0	16,0
Destination Marketing Organization (DMO) / trade associations	0,0	0,0	0,0	0,1
National Tourism Organization (NTO)	0,0		0,0	0,1
Tour operator / Travel agency	12,3	21,6	7,0	17,6
Hotel chains and cooperations with CRS	1,4		0,5	2,4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5,2		2,0	8,4
Event and Congress organizer	2,7		1,0	4,4
Online Booking Agency (OTA)	32,0	34,5	26,9	37,1
Globale Distributionssysteme (GDS)	2,3		1,1	3,5
Social Media Channels	0,1		0,0	0,2
other distribution channels	2,6	2,6	0,0	5,3

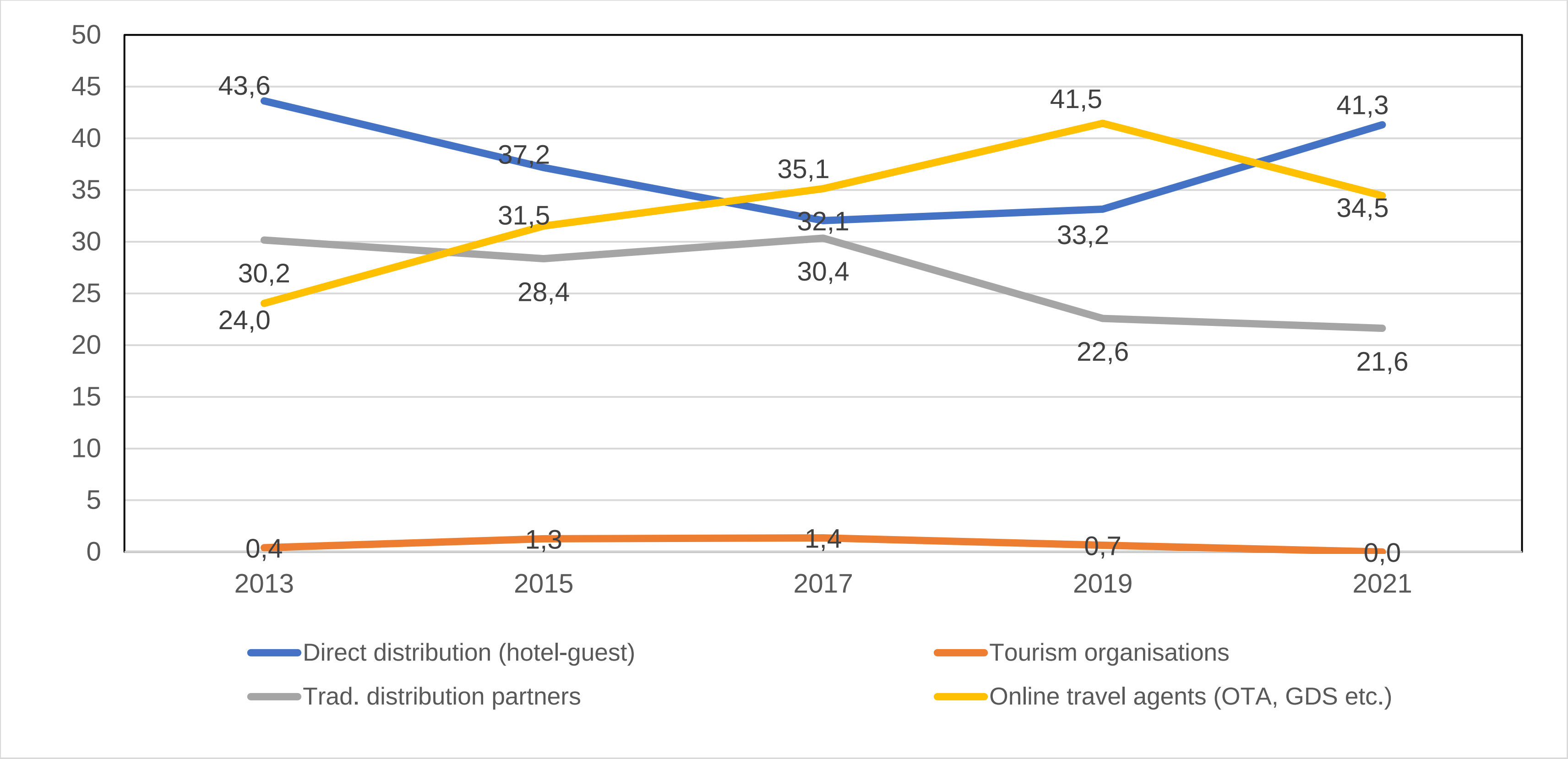
Market shares in % of overnights.

Market shares of distribution channels in Spain: 2013 to 2021

	Market share 2021 (n=62)		Market share 2019 (n=57)		Market share 2017 (n=156)		Market share 2015 (n=132)		Market share 2013 (n=153)		DELTA (2021-2013)	
Direct - Phone	12,0	41,3	9,9	33,2	7,9	32,1	10,5	37,2	16,7	43,6	-4,7	-2,3
Direct - Mail / fax	2,5		0,5		1,3		1,8		2,7		-0,2	
Direct - Walk-In (persons without reservation)	3,8		2,9		3,2		3,7		6,1		-2,3	
Direct - Contact form on own website (without availabilty check)	3,4		2,2		3,3		2,6		3,3		0,0	
Direct - Email	6,5		7,7		6,4		8,4		6,5		0,0	
Direct - real time booking over own website with availabilty check	13,2		9,9		9,9		10,2		8,3		4,9	
Destination Marketing Organization (DMO) / trade associations	0,0	0,0	0,7	0,7	1,3	1,4	1,1	1,3	0,3	0,4	-0,3	-0,4
National Tourism Organization (NTO)	0,0		0,0		0,1		0,1		0,1		-0,1	
Tour operator / Travel agency	12,3	21,6	11,9	22,6	15,3	30,4	12,7	28,4	16,0	30,2	-3,7	-8,5
Hotel chains and cooperations with CRS	1,4		1,5		2,2		2,6		3,6		-2,2	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5,2		6,9		7,8		9,0		8,6		-3,4	
Event and Congress organizer	2,7		2,3		5,1		4,0		2,0		0,8	
Online Booking Agency (OTA)	32,0	34,5	38,1	41,5	30,8	35,1	27,6	31,5	21,7	24,0	10,4	10,4
Globale Distributionssysteme (GDS)	2,3		3,3		4,2		3,6		1,9		0,4	
Social Media Channels	0,1		0,1		0,2		0,3		0,5		-0,4	
other distribution channels	2,6	2,6	2,1	2,1	1,1	1,1	1,7	1,7	1,8	1,8	0,8	0,8

Unweighted sample. Market shares in % of overnights.

Distribution trends in Spain: 2013 to 2021



Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels 2021: Sweden

Unweighted overall sample (94 valid observations for the distribution channels)	Market share 2021		95% confidence interval	
Direct - Phone	16,2	50,5	13,5	18,9
Direct - Mail / fax	0,9		0,3	1,5
Direct - Walk-In (persons without reservation)	3,0		2,4	3,6
Direct - Contact form on own website (without availability check)	2,7		1,4	4,1
Direct - Email	14,8		11,4	18,2
Direct - real time booking over own website with availability check	12,9		9,6	16,2
Destination Marketing Organization (DMO) / trade associations	0,1	0,1	0,0	0,2
National Tourism Organization (NTO)	0,0		na	na
Tour operator / Travel agency	9,0	15,1	6,0	12,0
Hotel chains and cooperations with CRS	3,5		1,3	5,7
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,0		0,4	1,6
Event and Congress organizer	1,6		0,6	2,6
Online Booking Agency (OTA)	31,1	33,3	26,5	35,8
Globale Distributionssysteme (GDS)	1,7		0,5	2,9
Social Media Channels	0,5		0,2	0,8
other distribution channels	1,0	1,0	0,0	1,9

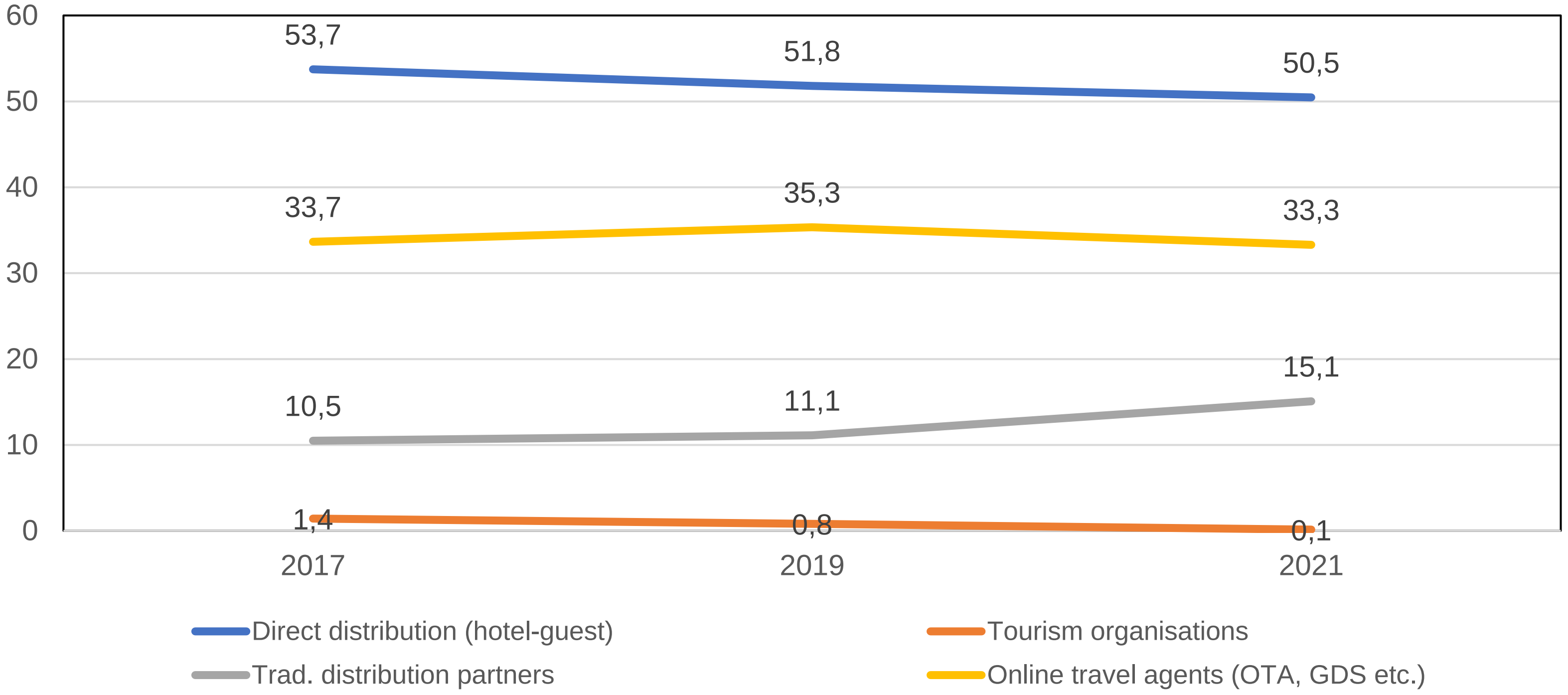
Market shares in % of overnights.

Market shares of distribution channels in Sweden: 2013 to 2021

	Market share 2021 (n=94)		Market share 2019 (n=108)		Market share 2017 (n=140)		*Market share 2015 (n=74)*		*Market share 2013 (n=17!)*		DELTA (2021-2017)	
Direct - Phone	16,2	50,5	18,5	51,8	21,6	53,7	*15,5*	*39,5*	*34,1*	*74,7*	-5,5	-3,3
Direct - Mail / fax	0,9		0,4		0,2		*1,5*		*1,2*		0,7	
Direct - Walk-In (persons without reservation)	3,0		1,9		3,2		*3,4*		*4,5*		-0,2	
Direct - Contact form on own website (without availabilty check)	2,7		3,6		3,4		*3,1*		*6,9*		-0,7	
Direct - Email	14,8		17,6		17,6		*16,1*		*22,2*		-2,8	
Direct - real time booking over own website with availabilty check	12,9		9,7		7,7		*0,1*		*5,8*		5,2	
Destination Marketing Organization (DMO) / trade associations	0,1	0,1	0,8	0,8	1,3	1,4	*0,0*	*0,1*	*2,2*	*3,5*	-1,2	-1,3
National Tourism Organization (NTO)	0,0		0,0		0,1		*0,1*		*1,4*		-0,1	
Tour operator / Travel agency	9,0	15,1	4,8	11,1	5,3	10,5	*4,4*	*39,6*	*4,1*	*4,4*	3,7	4,6
Hotel chains and cooperations with CRS	3,5		4,1		3,1		*24,2*		*0,1*		0,4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1,0		0,8		0,4		*0,9*		*0,0*		0,6	
Event and Congress organizer	1,6		1,4		1,8		*10,1*		*0,2*		-0,1	
Online Booking Agency (OTA)	31,1	33,3	30,9	35,3	29,6	33,7	*8,8*	*20,9*	*11,8*	*13,6*	1,5	-0,3
Globale Distributionssysteme (GDS)	1,7		4,0		3,4		*12,1*		*1,5*		-1,7	
Social Media Channels	0,5		0,5		0,7		*0,0*		*0,3*		-0,2	
other distribution channels	1,0	1,0	0,9	0,9	0,7	0,7	*0,0*	*0,0*	*3,8*	*3,8*	0,3	0,3

Unweighted sample. Market shares in % of overnights. **Observations for 2013 and 2015 not sufficient and reliable.**

Distribution trends in Sweden: 2017 to 2021



Unweighted sample. Market shares in % of overnights. Observations for 2013 and 2015 not sufficient and reliable and therefore not included.

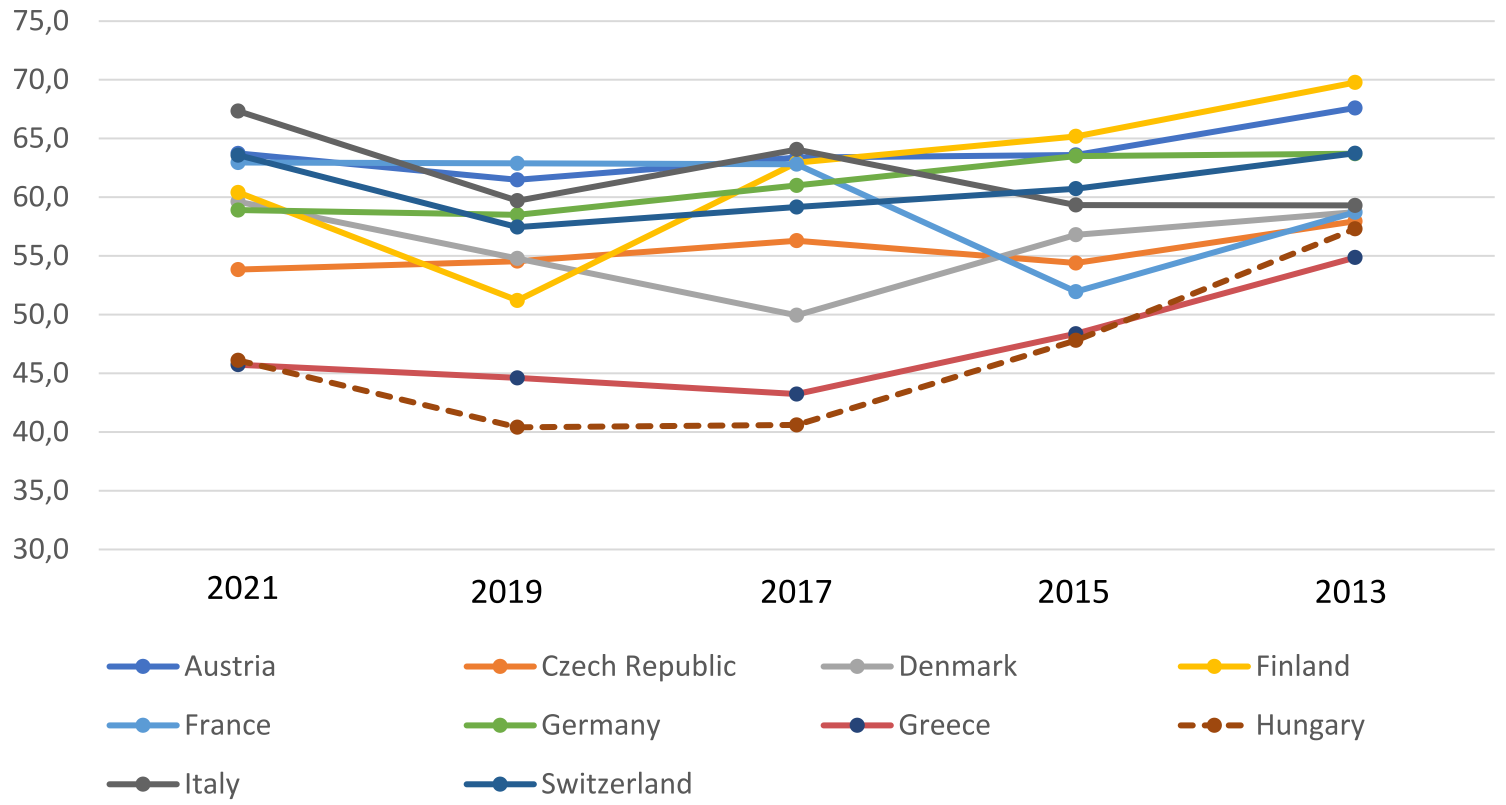
Analysis of direct booking market shares

Direct booking shares for selected countries

Country	2021	2019	2017	2015	2013	Evolution of direcct bookings (2013-2021)	Delta (2013-2021)
Austria (299 / 40 / 32 / 130 / 58)	63,7	61,5	*63,4*	63,6	67,6	**decreasing**	-3,9
Belgium (29 / 3 / 40 / 76 / 78)	*53,4*		62,4	50,4	61,2	decreasing	-7,8
Croatia (86 / 81 / 32 / 0 / 26), weighted values 2019 and 2021	33,3	29,6	*51,3*		*52,4*	decreasing	-19,1
Czech Republic (90 / 69 / 65 / 51 / 82)	53,8	54,6	56,3	54,4	58,0	**decreasing**	-4,1
Denmark (66 /0 / 31 /98 / 73)	59,6		*49,9*	56,8	58,7	***increasing***	0,9
Finland (53 / 91 / 109 / 50 / 66), weighted values	60,4	51,2	62,9	65,2	69,8	**decreasing**	-9,4
France (108 / 878 / 158 / 22 / 49)	63,0	58,3	62,8	*52,0*	*58,7*	***increasing***	4,2
Germany (1258 / 1028 / 1038 / 994/ 966), weighted values	58,9	58,5	61,0	63,5	63,7	**decreasing**	-4,8
Greece (236 / 179 / 121 / 177 / 266)	45,7	44,6	43,2	48,4	54,9	**decreasing**	-9,1
Hungary (69 / 77 / 130 / 98 / 75), weighted values	46,1	40,4	40,6	47,8	57,3	**decreasing**	-11,2
Ireland (28 / 59 / 28 / 55 / 33)	*63,4*	48,3	*54,1*	51,1	*59,4*	*increasing*	4,1
Italy (574 / 601 / 344 / 260 / 101*)	67,3	59,7	64,1	59,3		***increasing (2015-2021)***	8,0
Norway (50 / 19 / 53 / 102* / 55)	68,0	*50,2*	55,6	*38,4**	68,3	stable	-0,2
Slovakia (60 / 36 / 18 / 23 / 35)	64,1	*59,2*	62,5	69,0	*70,1*	**decreasing**	-6,1
Spain (62 / 57 / 156 / 132 / 153)	41,3	33,2	32,1	37,2	43,6	**decreasing**	-2,3
Sweden (61, 108 / 140 / 73* / 17*)	55,6	51,8	53,7	*38.9**	*74,7*	*increasing (2017-2021)*	1,8
Switzerland (245 / 287 / 252 / 226 / 272)	63,6	57,5	59,2	60,7	63,7	stable	-0,2
Turkey* (29 / 9 / 40 / 56 / 52)	*44,4*	*39,3*	50,1	43,0	41,7	*increasing*	2,7

Number of observations in brackets for 2021, 2019, 2017, 2015 and 2013 respectively. Values marked in gray and italic when n<=35 or italic when data n <50. Values marked with * have a reliability issue.

Direct booking shares for selected countries 2013-2021



Direct Booking Trends in the Swiss Hotel Sector 2002-2021

*Schegg (2022). Market shares in % of bookings from 2002-2012 & 2014 and in % of overnight stays in *2013, *2015 - *2021!*

Direct booking shares by segment 2021 (overall sample Europe)

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***
	58,6%	66,6%	64,0%	55,4%	**59,1%**

Star category	1*	2*	3*	4*	5*	other category	***Total***
	58,7%	56,5%	59,8%	57,5%	47,2%	64%	**58,3%**

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***
	61,3%	61,7%	57%	48,7%	**59,0%**

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***
	61,4%	57,1%	57,1%	71,5%	**59,1%**

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***
	46,4%	54,5%	60,9%	64,3%	**59,1%**

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***
	60,5%	48,6%	58,9%	**59,2%**

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

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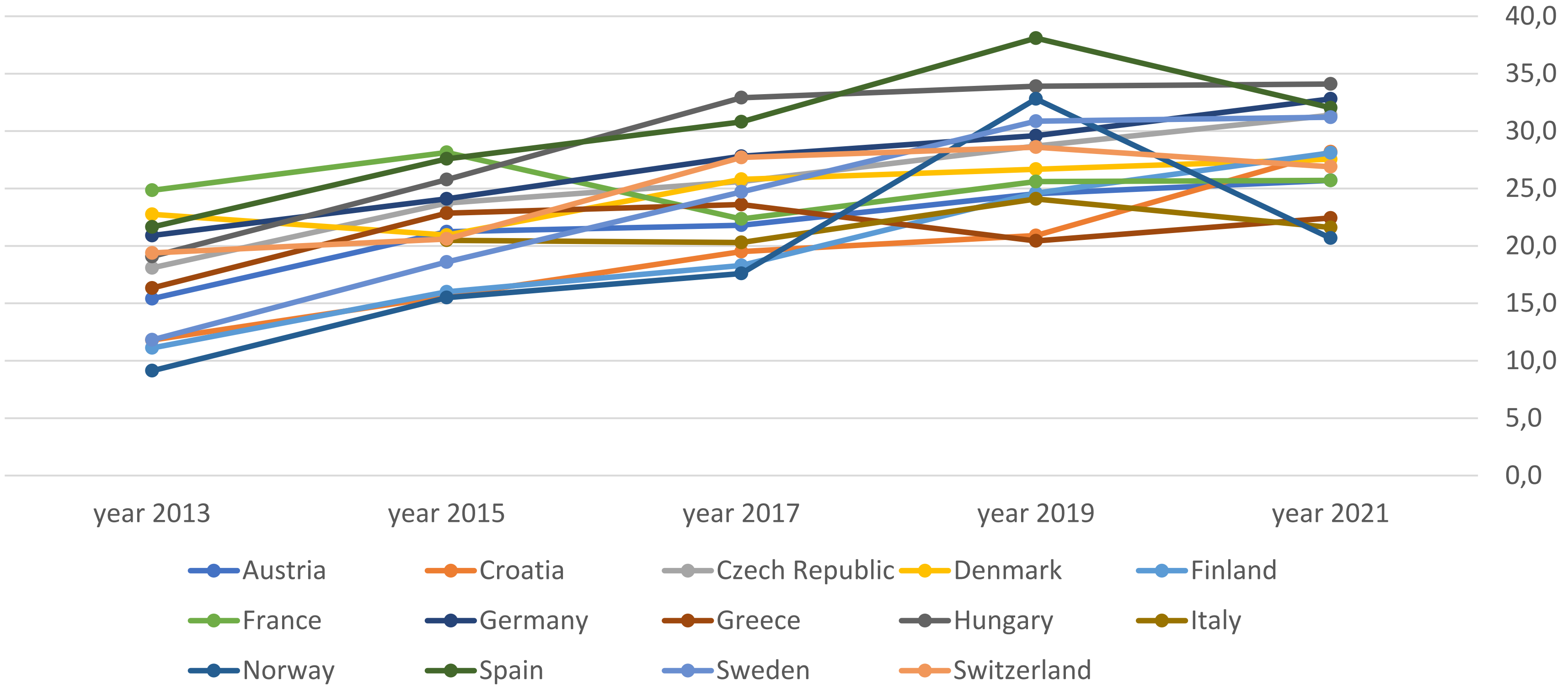
> Analysis of OTA market shares

OTA market shares 2013 to 2019 for selected countries

	2021	2019	2017	2015	2013	Trend 2013-2021	Delta 2013-2021
Austria (299 / 40 / 32 / 130 / 58)	25,7	24,6	*21,8*	21,2	15,4	**increasing**	10,3
Belgium (29 / 3 / 40 / 76 / 78)	*42,0*	na	*30,4*	36,7	27,9	increasing	14,1
Croatia (86 / 81 / 32 / 0 / 26), weighted values 2019 and 2021	28,2	20,9	*19,5*	na	*11,8*	increasing	16,4
Czech Republic (90 / 69 / 65 / 52 / 82)	31,4	28,7	25,6	23,7	18,1	**increasing**	13,3
Denmark (66 / 0 / 31 / 120 / 73)	27,6	na	*25,8*	20,9	22,8	**increasing**	4,8
Finland (53 / 91 / 116 / 77 / 66)	28,1	24,6	18,3	16,0	11,1	**increasing**	17,0
France (108 / 878 / 158 / 22 / 49)	25,7	25,6	22,4	*28,1*	*24,8*	**increasing**	0,9
Germany (1228 / 1028 / 1038 / 994 / 966), *weighted*	32,8	29,6	27,8	24,1	20,9	**increasing**	11,9
Greece (236 / 179 / 121 / 179 / 266)	22,4	20,4	23,6	22,9	16,3	**increasing**	6,1
Hungary (69 / 77 / 130 / 78 / 76), weighted	34,1	33,9	32,9	25,8	19,1	**increasing**	15,0
Ireland (28 / 51 /28 / 55 / 33)	*24,0*	29,5	*26,7*	25,7	*15,3*	increasing	8,7
Italy (574 / 601 / 344 / 260 / 101)	21,6	24,1	20,3	20,5	na*	increasing, 2015-2021	1,1
Norway (50/ 19 / 146 / 185 / 55)	20,7	*32,8*	17,6	15,5	9,1	**increasing**	11,6
Poland (0 / 14 / 30 / 33 / 0)	na	*28,5*	*26,4*	*22,7*	na	na	na
Spain (62 / 57 / 156 / 132 / 153)	32,0	38,1	30,8	27,6	21,7	**increasing**	10,4
Sweden (61 / 108 / 219 / 157 / 17)	31,2	30,9	24,7	18,6	*11,8*	**increasing**	19,4
Switzerland (245 / 287 / 252 / 226 / 272)	26,9	28,6	27,7	20,6	19,4	**increasing**	7,5
Turkey (29 / 9 / 40 / 56/ 52)	*23,8*	*21,4*	14,8	17,3	12,1	increasing	11,7

Number of observations in brackets for 2021, 2019, 2017, 2015 and 2013 respectively. Values marked in gray and italic when n<=35 or italic when data n <50. Values marked with * have a reliability issue

OTA market shares (in %) 2013 to 2021 for selected countries



OTA market shares by segment 2021 (overall sample Europe)

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	*Total*		
	29,6%	21,1%	18,0%	22,0%	***27,7%***		

Star category	1*	2*	3*	4*	5*	other category	*Total*
	24,3%	29,2%	29,2%	24,5%	20, 17%	26,6%	***27,1%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	*Total*		
	29,1%	28,0%	26,6%	25,1%	***27,7%***		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	*Total*		
	27,9%	28,3%	25,4%	17,0%	***27,7%***		

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*		
	37,6%	31,4%	26,6%	23,5%	***27,7%***		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	*Total*			
	28,0%	28,0%	23,4%	***27,7%***			

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

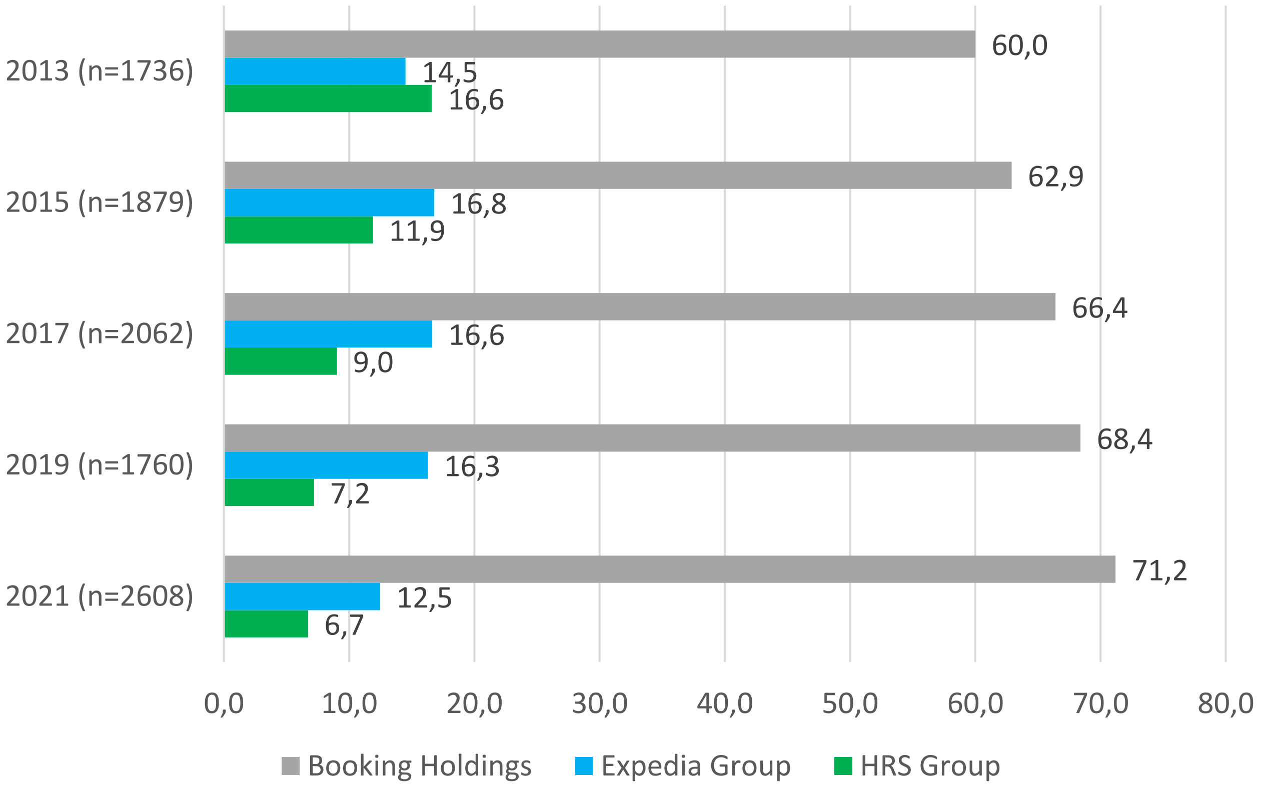
Analysis of OTA market players and their relative market shares

BOOKING HOLDINGS

Expedia

HRS

Unweighted relative market shares (in %) of major OTAs in Europe (2013-2021)



	Europe 2021 (n=2608)
Agoda	0,6
Booking.com	70,6
Booking Holdings	**71,2**
HRS	5,9
hotel.ch	0,1
Hotel.de	0,7
Tiscover	0,1
HRS (total)	**6,7**
Expedia	9,3
Hotels.com	2,1
eBookers	1,0
Orbitz Travel	0,1
Expedia Group	**12,5**
TOTAL	**90,4**

-> Airbnb: 1,5 %

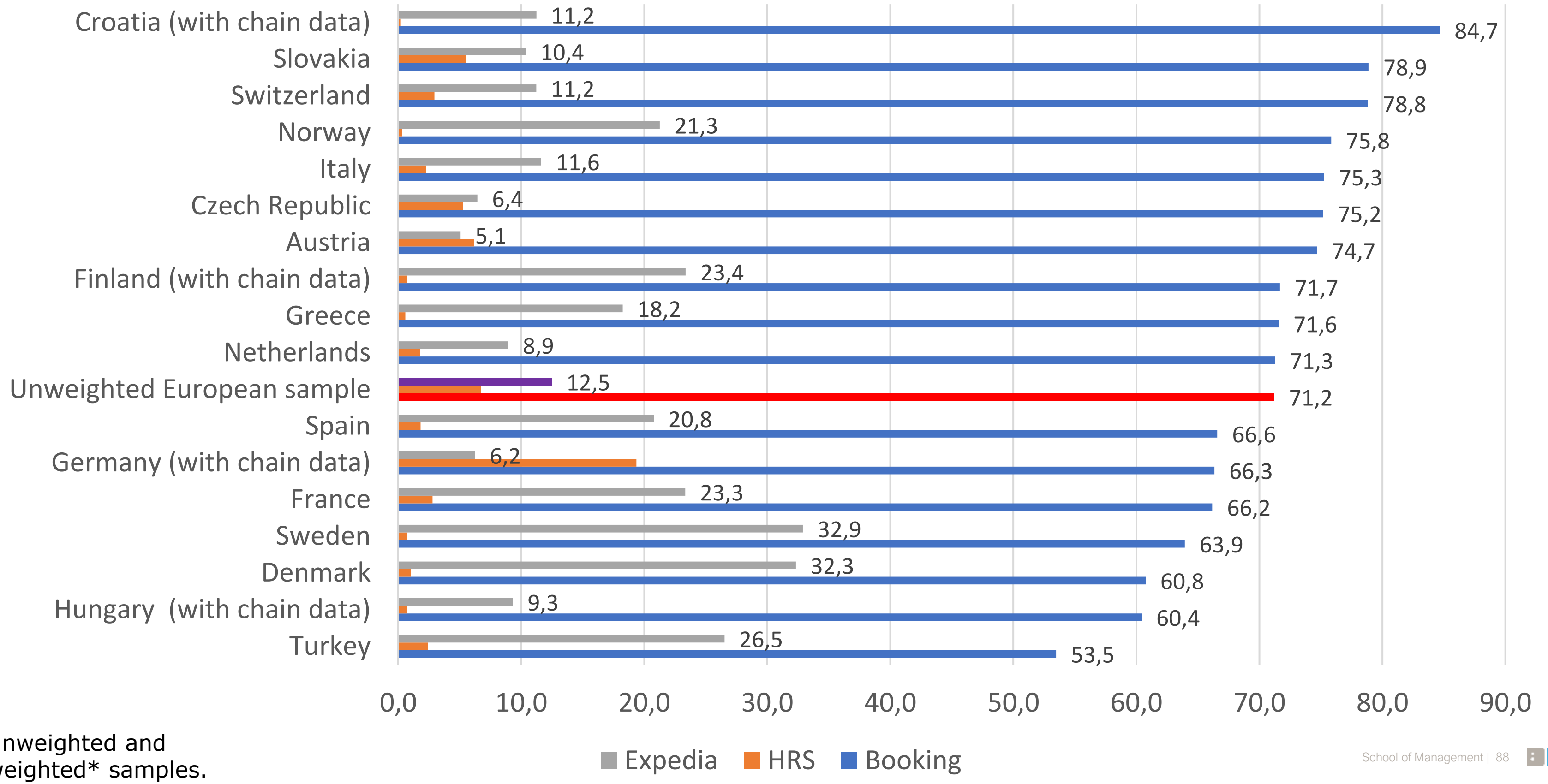
Unweighted and weighted relative market shares (in %) of major OTAs for selected countries in 2021 (I)

	Austria	Croatia	Croatia (with chain data)	Czech Republic	Denmark	Finland	Finland (with chain data)	France	Germany	Germany (with chain data)	Greece
Number of observations	*238*	*29*	*82*	*79*	*61*	*43*	*47*	*88*	*687*	*1122*	*183*
Agoda	0,2	0,6	0,4	0,8	0,2	0,4	0,6	1,9	0,3	0,4	1,1
Booking.com	74,4	80,2	84,2	74,4	60,5	75,3	71,0	64,3	66,7	65,9	70,5
Booking Holding	**74,7**	**80,8**	**84,7**	**75,2**	**60,8**	**75,6**	**71,7**	**66,2**	**67,0**	**66,3**	**71,6**
HRS	4,4	0,3	0,2	4,1	0,9	0,3	0,3	2,5	16,6	17,3	0,4
Hotel.ch	0,1	0,0	0,0	0,4	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Hotel.de	0,6	0,0	0,0	0,8	0,2	0,3	0,5	0,3	1,5	1,8	0,2
Tiscover	1,1	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,2	0,0
HRS	**6,2**	**0,3**	**0,2**	**5,3**	**1,0**	**0,5**	**0,8**	**2,8**	**18,1**	**19,4**	**0,6**
Expedia.com	4,1	13,5	10,5	5,0	17,6	9,7	12,2	18,3	7,3	4,2	13,2
Hotels.com	0,7	1,0	0,4	1,2	13,4	5,2	5,8	4,8	0,8	1,1	4,0
eBookers (Expedia)	0,3	0,5	0,3	0,3	1,2	5,0	5,2	0,2	0,8	0,8	0,8
Orbitz Travel (Expedia)	0,1	0,0	0,0	0,0	0,0	0,1	0,2	0,0	0,1	0,1	0,2
Expedia Group	**5,1**	**15,0**	**11,2**	**6,4**	**32,3**	**20,0**	**23,4**	**23,3**	**8,9**	**6,2**	**18,2**
TOTAL	**85,9**	**96,1**	**96,1**	**86,9**	**94,1**	**96,1**	**95,8**	**92,3**	**94,0**	**91,9**	**90,4**

Unweighted and weighted relative market shares (in %) of major OTAs for selected countries in 2021 (II)

	Hungary	Hungary (with chain data)	Italy	Netherlands	Norway	Slovakia	Spain	Sweden	Switzerland	Turkey	Unweighted European sample
Number of observations	*58*	*67*	*490*	*115*	*31*	*53*	*57*	*49*	*199*	*25*	*2608*
Agoda	1,4	0,6	0,5	1,3	0,2	0,6	0,5	0,1	0,7	3,8	0,63
Booking.com	57,1	59,9	74,7	70,0	75,7	78,2	66,1	63,8	78,1	49,7	70,57
Booking Holding	**58,5**	**60,4**	**75,3**	**71,3**	**75,8**	**78,9**	**66,6**	**63,9**	**78,8**	**53,5**	**71,2**
HRS	1,2	0,6	1,8	1,5	0,3	4,9	1,4	0,5	1,7	1,6	5,86
Hotel.ch	0,0	0,0	0,1	0,0	0,0	0,0	0,0	0,0	0,8	0,0	0,10
Hotel.de	0,2	0,1	0,3	0,3	0,0	0,6	0,4	0,2	0,5	0,7	0,66
Tiscover	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0.005	0,0	0,11
HRS	**1,4**	**0,7**	**2,2**	**1,8**	**0,3**	**5,5**	**1,8**	**0,7**	**2,9**	**2,4**	**6,7**
Expedia.com	7,9	8,9	9,8	7,2	12,3	8,0	17,0	18,6	6,9	19,0	9,33
Hotels.com	0,8	0,1	1,2	0,9	5,6	1,4	2,0	14,2	1,4	5,9	2,09
eBookers (Expedia)	0,8	0,2	0,6	0,6	2,6	0,9	1,6	0,0	2,8	1,4	0,96
Orbitz Travel (Expedia)	0,2	0,2	0,1	0,3	0,8	0,1	0,3	0,0	0,1	0,2	0,10
Expedia Group	**9,7**	**9,3**	**11,6**	**8,9**	**21,3**	**10,4**	**20,8**	**32,9**	**11,2**	**26,5**	**12,5**
TOTAL	**69,6**	**70,5**	**89,1**	**82,0**	**97,4**	**94,7**	**89,2**	**97,6**	**93,0**	**82,4**	**90,4**

Relative OTA market shares (in %) for selected countries 2021



Unweighted and weighted* samples.

Hotrec Hospitality Europe

Relative market shares of Booking.com by hotel segment 2021

Hes·so VALAIS WALLIS

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	*Total*		
	68,5%	78,7%	79,8%	77,9%	*70,7%*		

Star category	1*	2*	3*	4*	5*	other category	*Total*
	80,3%	78,7%	71,5%	68,0%	57,4%	66,5%	*70,3%*

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	*Total*		
	74,8%	72,3%	65,4%	65,0%	*70,7%*		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	*Total*		
	64,3%	73,9%	66,4%	72,0%	*70,7%*		

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*		
	64,6%	67,8%	69,8%	74,8%	*70,7%*		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	*Total*			
	72,4%	62,5%	65,9%	*70,8%*			

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

Hotrec Hospitality Europe

Relative market shares of Expedia.com by hotel segment 2021

Hes·so // VALAIS WALLIS

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	10,1%	5,1%	2,7%	9,2%	***9,4%***		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	5,5%	6,7%	9,2%	11,8%	21,1%	7,3%	***10,3%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	5,6%	8,7%	13,3%	14,4%	***9,5%***		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	11,0%	8,6%	14,4%	6,3%	9,4%		

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***		
	14,7%	11,2%	9,5%	6,5%	***9,4%***		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	8,0%	16,7%	11,7%	9,3%			

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

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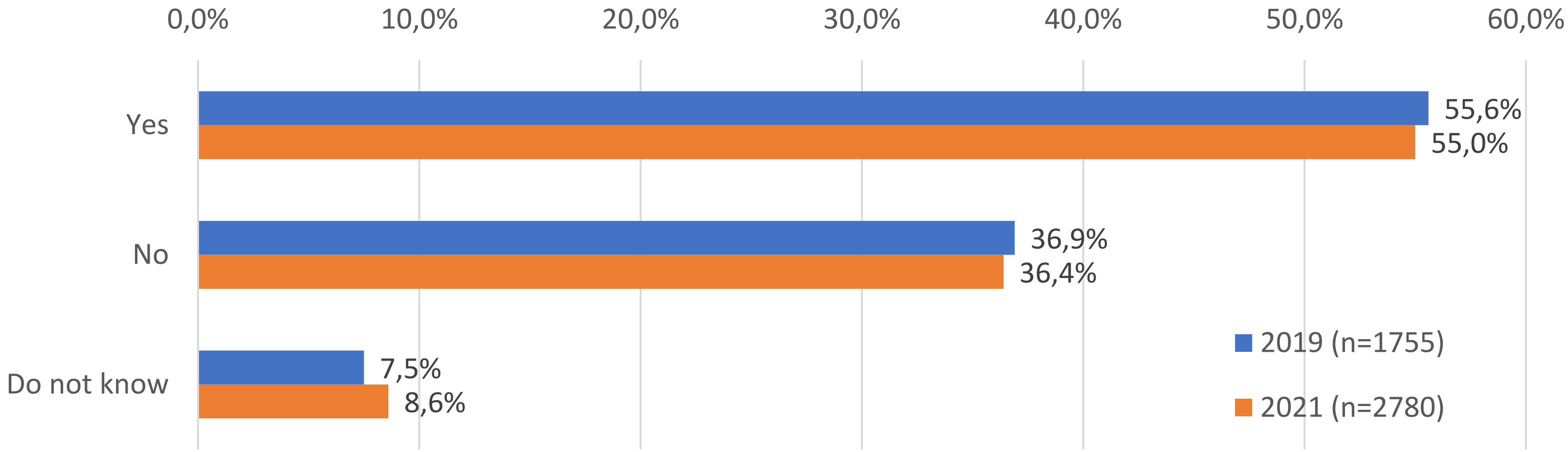
> OTA – hotel relationship

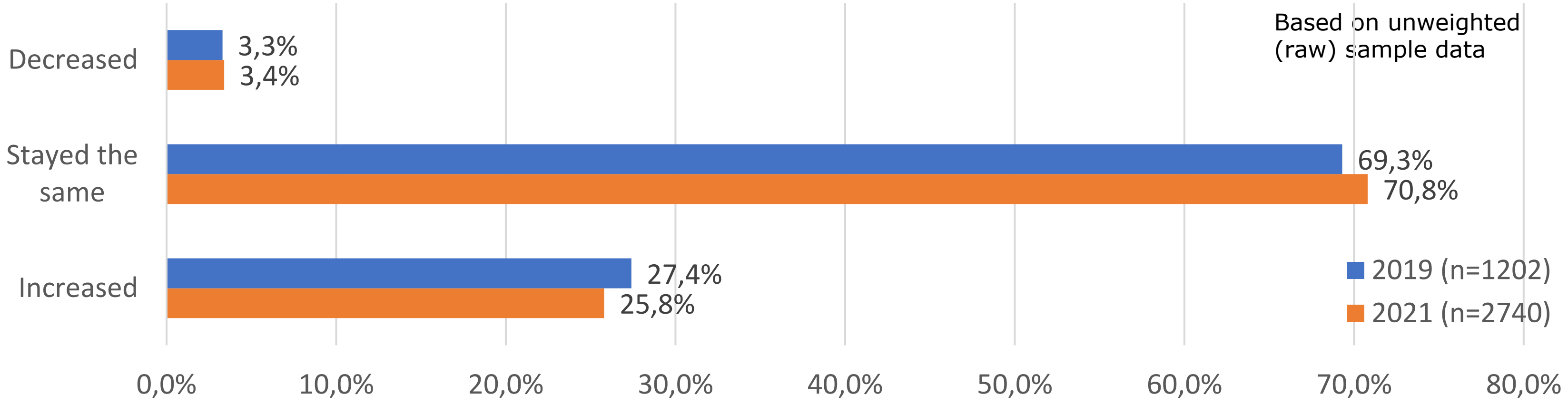
Do you feel pressured by OTA to accept their terms & conditions that you otherwise would not offer?



Based on unweighted (raw) sample data

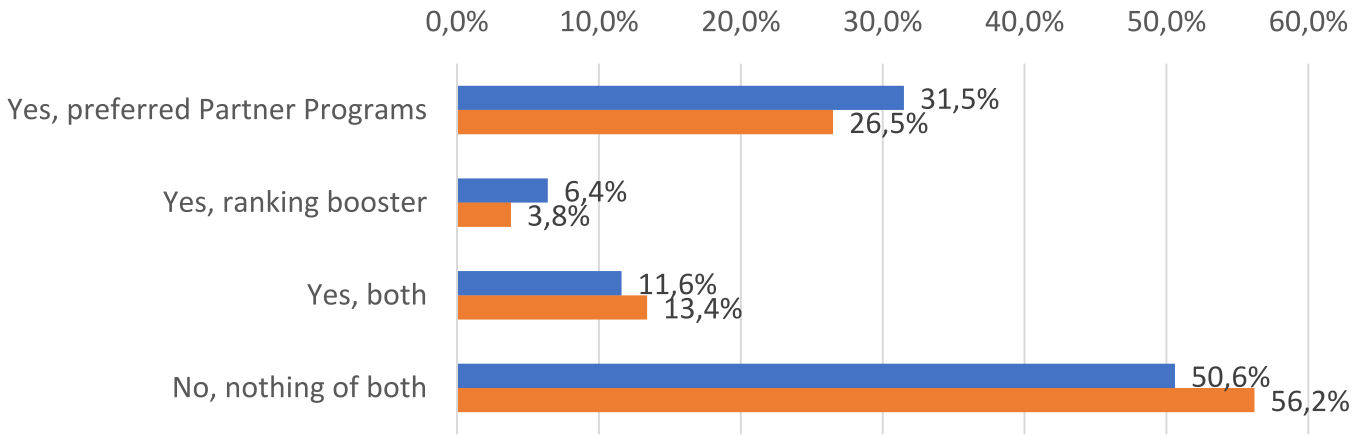
- On average, more than half of the hotels in the sample (55%) feel pressured by OTAs.
- Hotels that are highly dependent on OTA perceive a significantly higher pressure: 61% "yes" for hotels with an OTA share of 30-50% and 66% for hotels with an OTA share of more than 50% compared to 55% for the sample as a whole.
- Fewer establishments belonging to hotel chains (47%) express a feeling of pressure than other types of hotels.
- Business hotels (62%) and hotels in big cities with more than 250’00 inhabitants (62%) are under higher pressure from the OTAs than the average hotel.

How have the (standard) commission rates of your OTAs developed over the last 3 years?



- On average, the standard commission rate stayed the same for nearly 70% of respondents, but for a significant part of the hotels (27%) the commission rate increased.
- Interestingly small hotels with less than 20 rooms see a significantly lower proportion of properties with a increase in standard commission rates over the last 3 years, 22.6% compared with 25.8% for the overall sample.
- Significantly more business hotels (28%) than leisure hotels (24%) have seen an increase in commission rates.
- Hotels with a high proportion of overnight stays generated through OTAs (over 60%) have experienced an above-average increase in standard commission (30.3% compared to the overall sample).

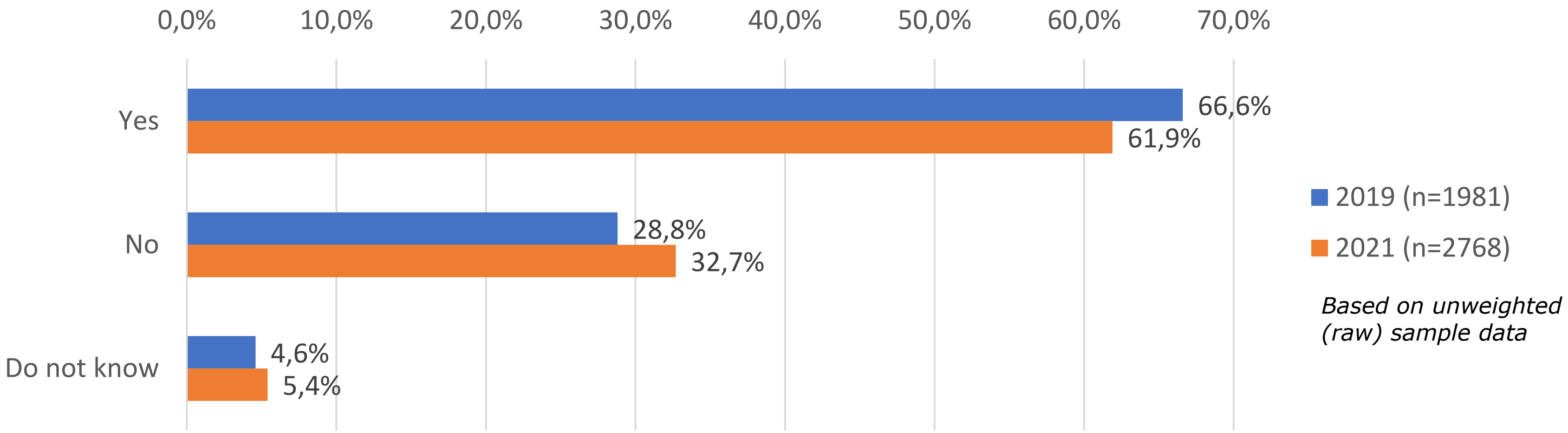
Have you ever made use of the various possibilities offered by OTA to improve effectively your ranking?



Based on unweighted (raw) sample data

- On average, nearly every second hotel (44%) used rank booster tools in 2021 (compared to 49% in 2019).
- As expected, hotels that are highly dependent on OTA use such options more often than other hotels: 52% of hotels with an OTA share of more than 30% whereas for hotels having less than 15% of room nights generated via OTAs the use of these tools is much lower (27%).
- Classified hotels, particularly 4* hotels (55%) and 5* hotels (68%), make fairly extensive use of "ranking booster" or "preferred partner" type partnership programs.
- We observe higher than average usage of these features as well for hotels with more than 50 rooms (57%), chain hotels (67%) and hotels in big cities (68%).

Do you use the online payment of Booking or Expedia ?



- On average, six out of ten hotels use the online payment options of Booking or Expedia, less than in 2019 (67%).
- Classified hotels, particularly 4* hotels (67%) and 5* hotels (78%), make fairly extensive use of this option.
- We observe higher than average usage of these features as well for hotels with more than 50 rooms (70%), chain hotels (76%), in business hotels (68%) and hotels in big cities (78%).
- As expected, hotels that are highly dependent on OTA use such payment options more often than other hotels: 70% of hotels with an OTA share of more than 30% whereas for hotels having less than 15% of room nights generated via OTAs the use of these payment options is much lower (47%).

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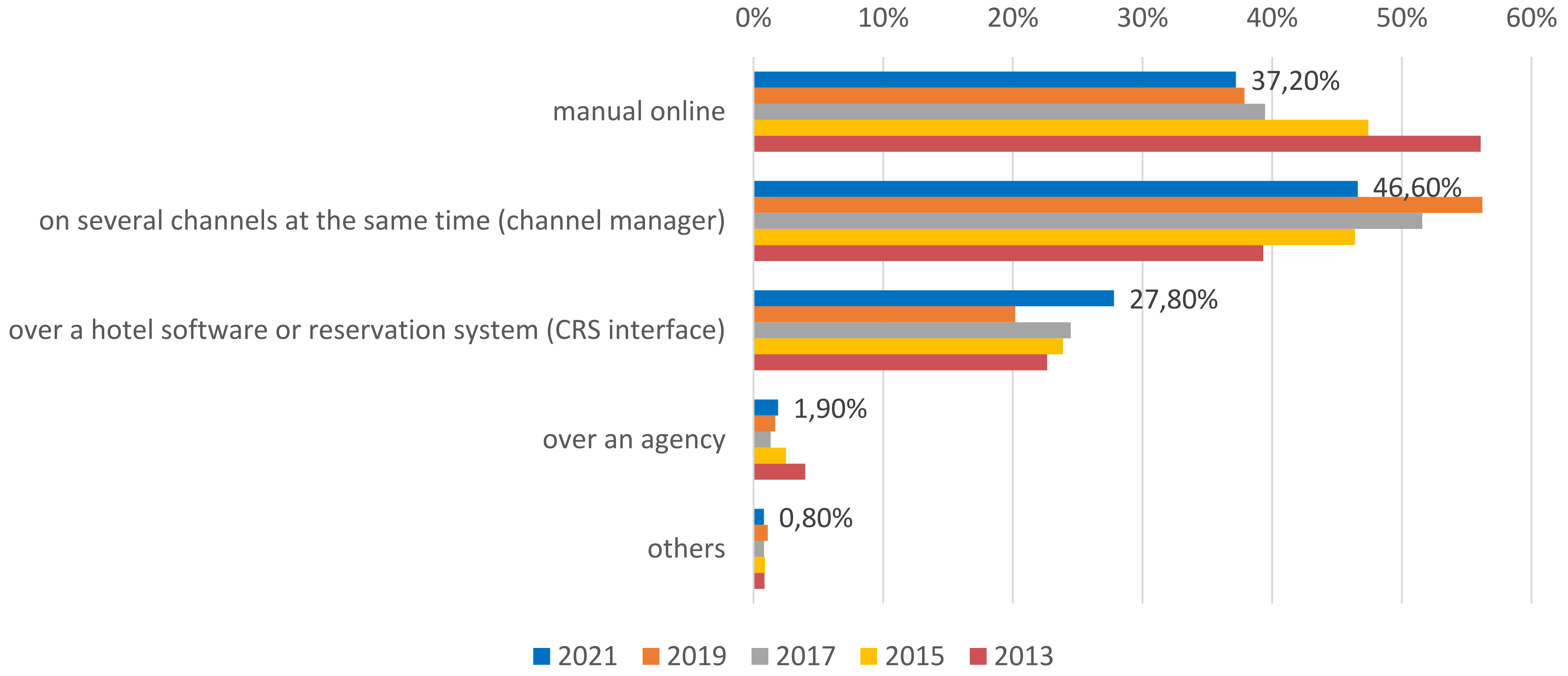
> **Distribution channel management**

How do you maintain your rates and availabilities on the online booking channels?



Based on unweighted (raw) sample data (2013-2021).

Channel management: summary of overall results

- Compared to 2013, the proportion of hotels managing rates and availability in a manual way has decreased from 56% to 37% and the **use of channel managers has increased from 39% to 47%.**
- As expected, **chain hotels** use channel managers (49% of properties) and PMS-CRS systems (52%) significantly more often than independent hotels (44% resp. 23%) which still manage channels in a manual manner most of the time (43%). With 66% of hotels hotel cooperations are intense users of channel managers.
- **In 4* and 5* hotels, the use of channel managers (60% and 51%, respectively) and CRS hotel software (35% and 45%, respectively) is clearly higher** than in other types of hotels. In 1* and 2* hotels more than half of properties still manage channels manually (69% in 1* and 55% in 2* hotels).
- **Size matters**: 58% of hotels with more than 50 rooms use channel managers whereas in hotels with less than 20 rooms, only 34% use a channel manager and 54% still manage channels in a manual way.
- **Hotels in big cities (57%) have a much higher channel manager penetration rate** than the overall sample.
- **Hotels with a higher proportion of OTA bookings (over 30%) use channel managers more often (55%)** than hotels with less than 15% of OTA bookings where channel managers are used in 29% of establishments.

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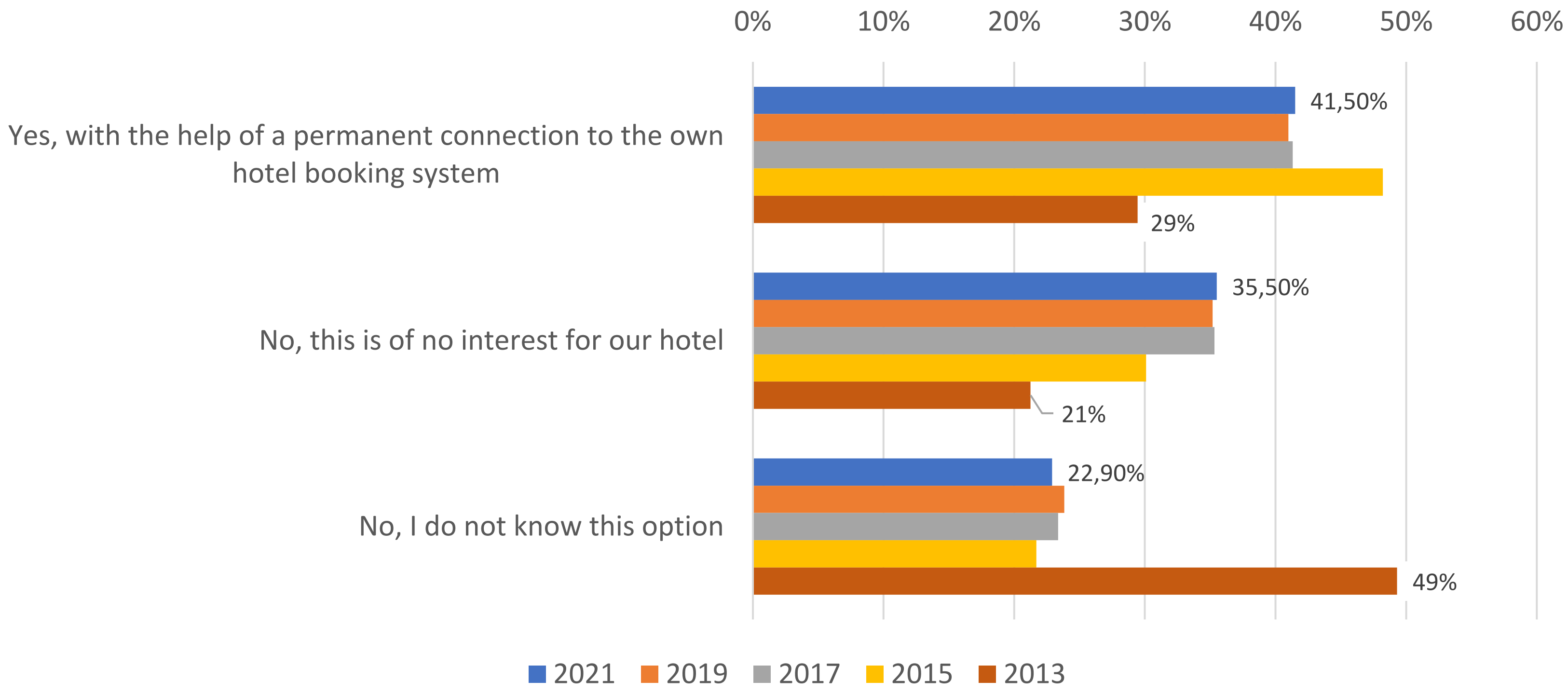
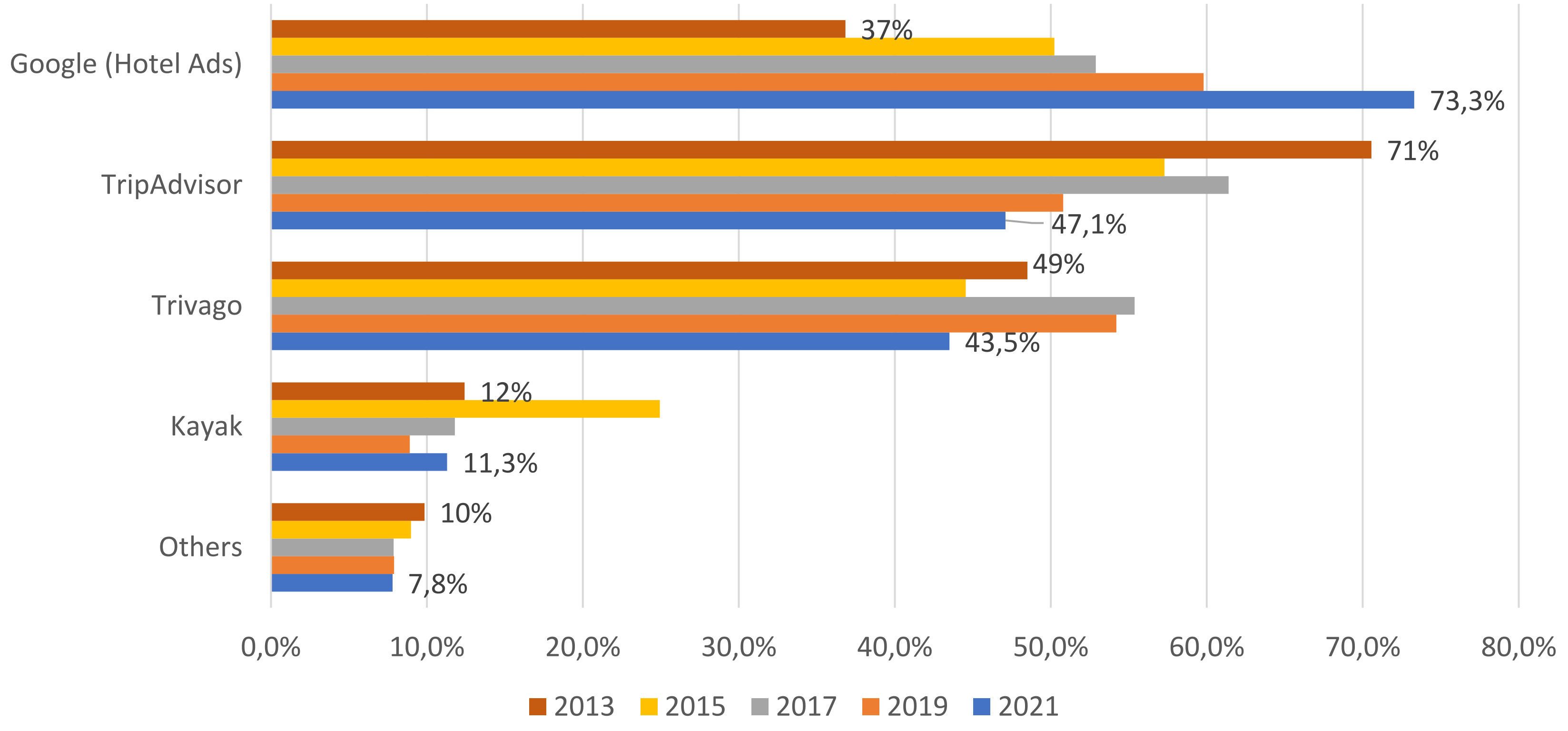
> Use of meta-search engines

Are your rates and availabilities accessible with a direct interface with a meta-search engine?



Based on unweighted (raw) sample data

Used meta-search engines



Based on unweighted (raw) sample data.

Meta-search engines: summary of overall results

- Compared to 2013 where nearly half of the hotels did not know the integration options with travel **meta-search engines**, roughly 80% of respondents in the present survey are aware of this distribution channel which is **used by 41% of hotels**.
- **Highest proportions of permanent connection to meta-search engines** can be observed in the following hotel segments:
  - **chain hotels** (68% compared to independent hotels with 37%)
  - hotels with **more than 50 rooms** (57%)
  - **4 and 5 star hotels** (56% resp. 65%)
  - Hotel in **cities with more than 250’000 inhabitants** (57%)
  - **Hotels with more than 20% of bookings through OTAs** (46%), compared to 35% for hotels with less than 20% OTA bookings
- Back in 2013 TripAdvisor was the dominant meta-search platform in the market with a usage share of 71%. In 2021, **Hotel Ads by Google has become the market leader (73%)** followed by TripAdvisor (47%) and Trivago (44%).

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Annex 1: The Questionnaire (1)

Hotrec Hospitality Europe

The umbrella association of Hotels, Restaurants and Cafés in Europe

Many thanks for your interest in our survey. The results shall draw a precise picture of 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).

Your responses will be treated confidentially and no individual hotel will be identifiable in any reports or results generated as a result of this survey due to data aggregation.

Remarks:
- With the arrows you are able to navigate between the pages.
- Please do not forget to save your answers at the end by clicking on the "**SAVE**"-button.

Hotel chains and cooperations, that wish to deliver aggregated data for several properties, are kindly asked to contact Dr. Roland Schegg (roland.schegg@hevs.ch).

For technical assistance please contact Dr. Roland Schegg
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School of Management & Tourism
University of Applied Sciences of Western Switzerland Valais (HES-SO Valais)
Sierre, Switzerland

Annex 1: The Questionnaire (2)

Country

- ◯ Austria
- ◯ Azerbaijan
- ◯ Belgium
- ◯ Bulgaria
- ◯ Croatia
- ◯ Cyprus
- ◯ Czech Republic
- ◯ Denmark
- ◯ Estonia
- ◯ Finland
- ◯ France
- ◯ Georgia
- ◯ Germany
- ◯ Greece
- ◯ Hungary
- ◯ Iceland
- ◯ Ireland
- ◯ Italy
- ◯ Latvia
- ◯ Lithuania
- ◯ Luxembourg
- ◯ Malta
- ◯ Netherlands
- ◯ Norway
- ◯ Poland
- ◯ Portugal
- ◯ Romania
- ◯ Serbia
- ◯ Slovakia
- ◯ Slovenia
- ◯ Spain
- ◯ Sweden
- ◯ Switzerland
- ◯ Turkey
- ◯ Ukraine
- ◯ United Kingdom

Annex 1: The Questionnaire (3)

A. Distribution channels of hotel

What was the percentage of overnight stays in 2021 booked over the following channels? Please put in data as whole numbers, e.g. for 21.3% it would be 21. Moreover, please make sure that the sum of all direct and indirect channels amounts to 100%.

Direct - Phone	%
Direct - Mail / fax	%
Direct - Walk-In (persons without reservation)	%
Direct - Contact form on own website (without availabilty check)	%
Direct - Email	%
Direct - real time booking over own website with availabilty check	%
Destination Marketing Organization (DMO) / tourist office	%
National Tourism Organization (NTO)	%
Tour operator / Travel agency	%
Online Booking Agency (OTA)	%
Hotel chains and cooperations with CRS	%
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	%

Annex 1: The Questionnaire (4)

Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)		%
Event and Congress organizer		%
Social Media Channels		%
other distribution channels		%

Please check the sum of the channels with a click on "calculate sum".

Calculate SUM

If "other distribution channels", which ones:

Optional comments regarding the development of distribution channels in general:

Annex 1: The Questionnaire (5)

B. Online Travel Agencies (OTA)

If your hotel is bookable over Online Travel Agencies (OTA), please indicate the relative distribution (in %) of these overnight stays for the year 2021. Please put in data as whole numbers, e.g. for 21.3% it would be 21. The sum should amount to **100%.**

Agoda	%
Airbnb	%
Bergfex	%
Booking.com	%
BookNorway	%
Trip.com (ex-CTrip)	%
eBookers (Expedia)	%
Destinia	%
eDreams	%
Expedia.com	%
Hotel.ch	%
Hotel.de	%
Hoteliers.com	%

Hotrec Hospitality Europe

Annex 1: The Questionnaire (6)

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Hotels.nl		%
Hotels.com		%
HRS		%
Hotelzon		%
Lastminute.com		%
Logitravel		%
Orbitz Travel (Expedia)		%
Tiscover		%
Travelocity (Expedia)		%
Voyage-Privé		%
Voyage-SNCF.fr (excl. Rail)		%
Invia (ab-in-den-urlaub.de, hotelreservierung.de etc.)		%
other platforms		%

Please check the sum of the channels with a click on "calculate sum".

Calculate SUM

Hotrec Hospitality Europe

Annex 1: The Questionnaire (7)

Hes·so // VALAIS WALLIS

Hotels.nl		%
Hotels.com		%
HRS		%
Hotelzon		%
Lastminute.com		%
Logitravel		%
Orbitz Travel (Expedia)		%
Tiscover		%
Travelocity (Expedia)		%
Voyage-Privé		%
Voyage-SNCF.fr (excl. Rail)		%
Invia (ab-in-den-urlaub.de, hotelreservierung.de etc.)		%
other platforms		%

Please check the sum of the channels with a click on "calculate sum".

Calculate SUM

Annex 1: The Questionnaire (8)

Please check the sum of the channels with a click on "calculate sum".

Calculate SUM

If "other platforms", which ones:

Optional comments regarding online booking channels (OTA):

Annex 1: The Questionnaire (9)

Do you feel pressured by Online Booking platforms (OTA) to accept their terms & conditions (e.g. cancellation policy, special discounts, etc.) that you otherwise (voluntarily) would not offer?

- ◯ Yes
- ◯ No
- ◯ Do not know

What is the average commission rate for 2021 that you paid to the following OTAs (if applicable)?

Booking Holding		%
Expedia Group		%
HRS		%

How have the (standard) commission rates of your most important online booking platforms developed over the last 3 years?

- ◯ Increased
- ◯ Stayed the same
- ◯ Decreased

Have you ever made use of the various possibilities offered by OTA to improve effectively your ranking (e.g. ranking booster, preferred partner programs)?

- ◯ Yes, preferred Partner Programs
- ◯ Yes, ranking booster
- ◯ Yes, both
- ◯ No, nothing of both

Do you use the online payment of Booking or Expedia (Expedia Collect bookings)?

- ◯ Yes
- ◯ No
- ◯ Do not know

Hotrec Hospitality Europe

Annex 1: The Questionnaire (10)

Hes·so VALAIS WALLIS

C. Use of Booking Technology and New Media

How do you maintain your rates and availabilities on the online booking channels?

- ☐ on several channels at the same time (channel manager)
- ☐ manual online
- ☐ over an agency
- ☐ others
- ☐ over a hotel software or reservation system (CRS interface)

If "others", which ones? ____________________

Are your rates and availabilities accessible with a direct junction / interface with a meta-search engine (e.g. Kayak, Trivago, Tripadvisor etc.) ?

- ◯ Yes, with the help of a permanent connection to the own hotel booking system
- ◯ No, this is of no interest for our hotel
- ◯ No, I do not know this option

If you have a permanent connection, with which meta-search engine do you link up?

- ☐ Google (Hotel Ads)
- ☐ Kayak
- ☐ TripAdvisor
- ☐ Trivago
- ☐ Others

If "Others", which? ____________________

Annex 1: The Questionnaire (11)

D. General Information about your hotel

Seasonal opening hours

- ○ open all year round
- ○ two seasons business
- ○ one season business (winter)
- ○ one season business (summer)

Is your hotel classified (hotel stars)?

- ○ Yes
- ○ No

Star classification

- ○ 1*
- ○ 2*
- ○ 3*
- ○ 4*
- ○ 5*
- ○ other category

Size of hotel (number of hotel rooms)

[ ]

Most important customer segment

- ○ Business
- ○ Vacation / leisure
- ○ MICE
- ○ Other segment

Annex 1: The Questionnaire (12)

Place

- ○ 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)

Location

- ○ in de stad
- ○ alpine/mountain region
- ○ other location
- ○ seaside
- ○ rural region
- ○ city

Is your hotel part of a hotel chain or hotel cooperation?

- ☐ No
- ☐ Yes, hotel chain
- ☐ Yes, hotel cooperation

If you wish to receive an abstract of our final report, please write your email address below.

SAVE RESPONSES

A BIG THANK YOU FOR YOUR VALUABLE COLLABORATION!

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Annex 2: Sample characteristics (1)

Seasonal opening hours

Response rate: **93.9%**

	Nbr	
Non response	**195**	6.1%
open all year round	**2308**	71.7%
two seasons business	**312**	9.7%
one season business (winter)	**19**	0.6%
one season business (summer)	**387**	12.0%
Total	**3221**	

Is your hotel classified (hotel stars)?

Response rate: **93.5%**

	Nbr	
Non response	**210**	6.5%
Yes	**2194**	68.1%
No	**817**	25.4%
Total	**3221**	

Star classification

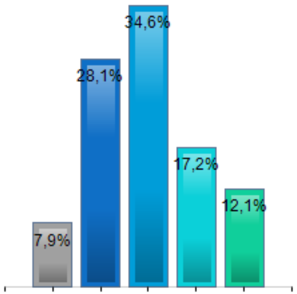
Response rate: **73.6%**

	Nbr	
Non response	**851**	26.4%
1*	**37**	1.1%
2*	**228**	7.1%
3*	**1159**	36.0%
4*	**754**	23.4%
5*	**118**	3.7%
other category	**74**	2.3%
Total	**3221**	

Size of hotel (number of hotel rooms)

Response rate: **92.1%**
Mean = **57.36** Median = **30.00** Std deviation = **92.52**
Min = **5** Max = **2000**

	Nbr
Non response	**255**
Less than 20	**906**
From 20 to 49	**1116**
From 50 to 99	**555**
100 and more	**389**
Total	**3221**



Most important customer segment

Response rate: **94.0%**

	Nbr	
Non response	**193**	6.0%
Business	**923**	28.7%
Vacation / leisure	**1906**	59.2%
MICE	**73**	2.3%
Other segment	**126**	3.9%
Total	**3221**	

Annex 2: Sample characteristics (2)

Place

Response rate: **91.8%**

	Nbr	
Non response	**263**	8.2%
City with more than 250'000 inhabitants	**521**	16.2%
City between 50'000 and 250'000 inhabitants	**407**	12.6%
City between 10'000 and 50'000 inhabitants	**671**	20.8%
small city (less than 10'000 inhabitants)	**1359**	42.2%
Total	**3221**	

Is your hotel part of a hotel chain or hotel cooperation?

Response rate: **92.2%**

	Nbr	
Non response	**250**	7.8%
No	**2424**	75.3%
Yes, hotel chain	**319**	9.9%
Yes, hotel cooperation	**238**	7.4%
Total	**3221**	

Location

Response rate: **87.0%**

	Nbr	
Non response	**419**	13.0%
city	**1104**	34.3%
seaside	**482**	15.0%
alpine/mountain region	**428**	13.3%
rural region	**604**	18.8%
other location	**184**	5.7%
Total	**3221**	

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Annex 3 (table of means): Distribution channels by seasonality

Table of means

	open all year round	two seasons business	one season business (winter)	one season business (summer)	**Total**
Direct - Phone	**20.13**	**16.68**	**8.72**	**16.40**	**19.24**
Direct - Mail / fax	**1.52**	**1.45**	**0.50**	**0.79**	**1.42**
Direct - Walk-In (persons without reservation)	**4.20**	**2.84**	**1.33**	**3.44**	**3.95**
Direct - Contact form on own website (without availabilty check)	**5.60**	**10.47**	**10.17**	**7.50**	**6.36**
Direct - Email	**16.36**	**22.81**	**32.83**	**17.39**	**17.25**
Direct - real time booking over own website with availabilty check	**10.82**	**12.33**	**10.44**	**9.83**	**10.85**
Destination Marketing Organization (DMO) / tourist office	**0.97**	**2.46**	**6.56**	**1.63**	**1.24**
National Tourism Organization (NTO)	**0.21**	**0.69**	**0.67**	**0.36**	**0.28**
Tour operator / Travel agency	**3.90**	**5.75**	**5.28**	**15.27**	**5.53**
Online Booking Agency (OTA)	**29.61**	**21.07**	**18.00**	**22.04**	**27.71**
Hotel chains and cooperations with CRS	**1.04**	**0.49**	**0.22**	**0.32**	**0.89**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**1.08**	**0.13**	**0.00**	**0.32**	**0.88**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**1.12**	**0.70**	**1.11**	**1.83**	**1.17**
Event and Congress organizer	**1.50**	**0.53**	**0.00**	**0.45**	**1.26**
Social Media Channels	**0.61**	**0.70**	**0.72**	**0.89**	**0.66**
other distribution channels	**1.31**	**0.91**	**3.44**	**1.55**	**1.31**

Values in blue significantly higher than average and values in red lower.

Annex 3 (table of means): Distribution channels by category

Table of means

	1*	2*	3*	4*	5*	other category	**Total**
Direct - Phone	31.71	23.05	19.25	16.72	13.22	18.10	18.65
Direct - Mail / fax	1.79	1.05	1.59	1.49	1.07	0.82	1.46
Direct - Walk-In (persons without reservation)	6.65	6.43	4.39	2.94	2.80	3.68	4.05
Direct - Contact form on own website (without availabilty check)	4.50	6.03	6.81	5.18	4.55	10.41	6.18
Direct - Email	8.41	12.91	18.34	16.68	13.16	19.25	16.92
Direct - real time booking over own website with availabilty check	5.68	7.08	9.40	14.53	12.35	11.83	10.99
Destination Marketing Organization (DMO) / tourist office	0.03	2.01	1.13	0.99	1.48	1.04	1.17
National Tourism Organization (NTO)	0.00	0.65	0.26	0.27	0.15	0.45	0.30
Tour operator / Travel agency	2.53	5.12	4.81	7.71	16.15	3.97	6.25
Online Booking Agency (OTA)	24.32	29.17	29.19	24.50	20.17	26.63	27.10
Hotel chains and cooperations with CRS	2.79	0.24	0.86	1.37	1.81	0.20	1.02
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	0.00	0.51	0.64	1.59	2.91	1.32	1.05
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.12	1.95	1.09	1.70	3.30	0.14	1.47
Event and Congress organizer	0.06	0.45	0.74	2.44	4.48	0.85	1.43
Social Media Channels	1.35	1.09	0.60	0.62	0.65	0.23	0.65
other distribution channels	7.06	2.26	0.90	1.27	1.75	1.08	1.29

Values in blue significantly higher than average and values in red lower.

Annex 3 (table of means): Distribution channels by size of hotel (nbe of rooms)

Table of means

	Less than 20	From 20 to 49	From 50 to 99	100 and more	Total
Direct - Phone	21.01	20.95	16.81	13.41	19.21
Direct - Mail / fax	1.13	1.48	1.39	1.87	1.41
Direct - Walk-In (persons without reservation)	3.94	4.39	3.64	3.01	3.93
Direct - Contact form on own website (without availabilty check)	8.12	6.64	5.17	2.60	6.29
Direct - Email	18.29	17.98	16.97	13.80	17.34
Direct - real time booking over own website with availabilty check	8.85	10.22	13.08	14.00	10.83
Destination Marketing Organization (DMO) / tourist office	1.64	1.12	0.97	0.75	1.20
National Tourism Organization (NTO)	0.34	0.25	0.27	0.27	0.28
Tour operator / Travel agency	3.15	4.32	7.32	12.42	5.58
Online Booking Agency (OTA)	29.09	28.02	26.60	25.08	27.70
Hotel chains and cooperations with CRS	0.49	0.63	1.03	2.46	0.90
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	0.26	0.58	1.52	2.35	0.89
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.84	1.06	1.50	2.16	1.22
Event and Congress organizer	0.38	0.77	1.80	4.17	1.29
Social Media Channels	0.86	0.55	0.67	0.43	0.65
other distribution channels	1.61	1.03	1.25	1.20	1.27

Values in blue significantly higher than average and values in red lower.

Annex 3 (table of means): Distribution channels by type of hotel

Table of means

	No	Yes, hotel chain	Yes, hotel cooperation	**Total**
Direct - Phone	**20.07**	**13.76**	**18.65**	**19.29**
Direct - Mail / fax	**1.32**	**2.06**	**1.62**	**1.42**
Direct - Walk-In (persons without reservation)	**4.05**	**3.87**	**3.17**	**3.96**
Direct - Contact form on own website (without availabilty check)	**6.98**	**2.79**	**4.86**	**6.37**
Direct - Email	**18.03**	**12.37**	**15.88**	**17.26**
Direct - real time booking over own website with availabilty check	**10.09**	**13.78**	**14.73**	**10.85**
Destination Marketing Organization (DMO) / tourist office	**1.30**	**0.82**	**1.28**	**1.25**
National Tourism Organization (NTO)	**0.29**	**0.21**	**0.32**	**0.29**
Tour operator / Travel agency	**4.93**	**7.99**	**7.84**	**5.48**
Online Booking Agency (OTA)	**28.04**	**27.96**	**23.36**	**27.66**
Hotel chains and cooperations with CRS	**0.34**	**3.97**	**2.62**	**0.91**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**0.50**	**3.36**	**1.12**	**0.85**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**1.03**	**2.04**	**1.09**	**1.14**
Event and Congress organizer	**0.93**	**3.58**	**1.71**	**1.27**
Social Media Channels	**0.69**	**0.39**	**0.66**	**0.65**
other distribution channels	**1.41**	**1.05**	**1.10**	**1.35**

Values in blue significantly higher than average and values in red lower.

Annex 3 (table of means): Distribution channels by size of city

Table of means

	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**
Direct - Phone	13.02	18.58	21.36	20.94	19.34
Direct - Mail / fax	1.57	1.57	1.72	1.13	1.40
Direct - Walk-In (persons without reservation)	4.21	4.05	4.34	3.63	3.95
Direct - Contact form on own website (without availabilty check)	3.32	4.51	6.31	7.94	6.29
Direct - Email	13.44	15.29	16.88	19.42	17.23
Direct - real time booking over own website with availabilty check	10.83	10.53	10.32	11.24	10.86
Destination Marketing Organization (DMO) / tourist office	0.73	0.70	0.83	1.81	1.25
National Tourism Organization (NTO)	0.13	0.21	0.29	0.38	0.29
Tour operator / Travel agency	4.72	5.31	5.80	5.56	5.43
Online Booking Agency (OTA)	37.62	31.37	26.60	23.48	27.73
Hotel chains and cooperations with CRS	1.88	1.14	0.69	0.57	0.90
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	2.09	1.64	0.67	0.27	0.86
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.26	1.51	1.19	0.68	1.18
Event and Congress organizer	2.48	1.98	0.82	0.83	1.27
Social Media Channels	0.45	0.40	0.77	0.74	0.65
other distribution channels	1.25	1.23	1.41	1.37	1.34

Values in blue significantly higher than average and values in red lower.

Annex 3 (table of means): Distribution channels by location of hotel

Table of means

	city	seaside	alpine/mountain region	rural region	other location	**Total**
Direct - Phone	17.38	19.34	19.03	23.02	22.76	19.55
Direct - Mail / fax	1.67	1.18	1.20	1.12	2.49	1.45
Direct - Walk-In (persons without reservation)	4.28	3.70	3.01	3.86	4.62	3.92
Direct - Contact form on own website (without availabilty check)	3.99	6.20	10.80	7.31	6.55	6.30
Direct - Email	15.04	14.43	22.07	18.86	17.60	17.01
Direct - real time booking over own website with availabilty check	10.44	10.67	12.33	10.59	9.31	10.72
Destination Marketing Organization (DMO) / tourist office	0.66	1.03	2.80	1.39	1.29	1.25
National Tourism Organization (NTO)	0.13	0.40	0.32	0.21	0.15	0.22
Tour operator / Travel agency	4.60	12.55	3.96	3.71	4.51	5.65
Online Booking Agency (OTA)	33.85	23.82	20.91	25.05	25.02	27.66
Hotel chains and cooperations with CRS	1.57	0.50	0.11	0.75	0.32	0.90
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	1.72	0.55	0.05	0.31	0.46	0.88
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.52	2.09	0.46	0.51	1.18	1.21
Event and Congress organizer	1.64	0.93	0.77	1.20	1.19	1.26
Social Media Channels	0.49	0.95	0.82	0.67	0.63	0.67
other distribution channels	1.00	1.65	1.36	1.44	1.93	1.33

Values in blue significantly higher than average and values in red lower.

Annex 3 (table of means): Distribution channels by main customer segment

Table of means

	Business	Vacation / leisure	MICE	Other segment	Total
Direct - Phone	22.81	16.88	17.07	30.19	19.24
Direct - Mail / fax	1.63	1.21	2.58	2.47	1.42
Direct - Walk-In (persons without reservation)	4.50	3.57	3.19	6.34	3.96
Direct - Contact form on own website (without availabilty check)	4.46	7.26	4.82	7.06	6.34
Direct - Email	19.17	16.08	19.78	18.45	17.21
Direct - real time booking over own website with availabilty check	8.93	12.12	9.69	7.01	10.88
Destination Marketing Organization (DMO) / tourist office	0.62	1.62	1.04	0.62	1.26
National Tourism Organization (NTO)	0.14	0.37	0.18	0.06	0.28
Tour operator / Travel agency	2.85	7.02	3.08	4.54	5.55
Online Booking Agency (OTA)	27.88	28.32	25.40	17.02	27.65
Hotel chains and cooperations with CRS	1.43	0.64	2.03	0.28	0.90
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	1.73	0.46	1.68	0.41	0.88
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.75	1.43	0.85	0.98	1.19
Event and Congress organizer	1.70	0.88	5.65	1.48	1.27
Social Media Channels	0.39	0.80	0.89	0.25	0.66
other distribution channels	1.01	1.34	2.06	2.86	1.32

Values in blue significant higher than average and values in red lower.

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Annex 4 (table of means): Relative market share of main OTAs by seasonal opening and category

Table of means

	Booking Holding	HRS Group	Expedia Group
open all year round	69.22	8.35	13.34
two seasons business	78.97	1.68	7.67
one season business (winter)	79.77	4.62	4.23
one season business (summer)	78.24	1.12	11.86
Total	71.36	6.78	12.53

Table of means

	Booking Holding	HRS Group	Expedia Group
1*	80.81	0.23	7.58
2*	79.85	2.95	10.37
3*	72.06	7.14	12.10
4*	68.68	7.03	15.71
5*	58.69	1.88	25.78
other category	66.75	5.10	10.00
Total	70.97	6.32	13.65

Values in blue significantly higher than average and values in red lower.

Annex 4 (table of means): Relative market share of main OTAs by size of hotel and main customer segment

Table of means

	Booking Holding	HRS Group	Expedia Group
Less than 20	75.28	5.89	7.25
From 20 to 49	72.87	8.00	12.12
From 50 to 99	66.26	7.56	17.29
100 and more	66.02	5.07	18.84
Total	71.32	6.91	12.67

Table of means

	Booking Holding	HRS Group	Expedia Group
Business	64.84	14.06	14.69
Vacation / leisure	74.64	3.11	11.41
MICE	66.94	5.14	21.50
Other segment	72.25	7.15	8.35
Total	71.29	6.73	12.60

Values in blue significantly higher than average and values in red lower.

Annex 4 (table of means): Relative market share of main OTAs by size of city and location

Table of means

	Booking Holding	HRS Group	Expedia Group
City with more than 250'000 inhabitants	65.95	6.31	18.67
City between 50'000 and 250'000 inhabitants	68.64	8.99	15.39
City between 10'000 and 50'000 inhabitants	70.57	8.90	12.77
small city (less than 10'000 inhabitants)	75.00	5.40	8.78
Total	71.37	6.90	12.50

Table of means

	Booking Holding	HRS Group	Expedia Group
city	66.85	8.88	15.99
seaside	75.13	1.66	14.10
alpine/mountain region	78.54	2.45	6.29
rural region	69.53	11.56	8.92
other location	75.35	6.06	9.76
Total	71.09	7.06	12.40

Values in blue significantly higher than average and values in red lower.

Annex 4 (table of means): Relative market share of main OTAs by type of hotel

Table of means

	Booking Holding	HRS Group	Expedia Group
No	72.97	7.03	10.79
Yes, hotel chain	63.86	4.11	21.48
Yes, hotel cooperation	66.45	9.34	16.09
Total	**71.38**	**6.89**	**12.46**

Values in blue significantly higher than average and values in red lower.