EXECUTIVE SUMMARY

European Hotel Distribution Study 2026

Reference year 2025

A long-term barometer of hotel distribution in Europe. The study provides an updated picture of how European hotels generated bookings in 2025, with particular attention to direct channels, online travel agencies (OTAs), platform practices, payment systems and digital technologies.

European hotel distribution in numbers

◆ **51.3%**

1 in 2 hotel room bookings are direct.

Hotels generate half of bookings through their own channels, including websites, email, telephone and walk-ins.

◆ **29.9%**

3 in 10 bookings go through OTAs.

Online Travel Agencies remain the single most important indirect distribution channel.

◆ **85.4%**

Booking Holdings + Expedia Group combined share of the OTA market.

More than 4 in 5 OTA bookings go through just two groups.

◆ **68.8%**

Booking Holdings' share of OTA bookings.

Almost 7 in 10 OTA bookings go through Booking.com.

◆ **51%**

1 in 2 hotels report OTA undercutting.

OTAs sell rooms below the prices offered directly by the hotel at least occasionally.

◆ **44%**

Hotels report OTA multi-sourcing.

Rates or inventory can appear through other platforms or distribution partners.

Figures refer to shares and practices reported by participating hotels. Results should be read in the context of the survey sample.

Methodology

2,713 hotels in total: 1,882 individual hotel responses from 28 countries plus aggregated distribution data from 831 hotel-chain properties. The sample is broad and diverse, and strongly SME-oriented.

MARKET STRUCTURE

A concentrated OTA market

European hotels use a mix of channels, but the OTA layer remains exceptionally concentrated.
The key finding is persistent concentration and platform control.

68.8% Booking Holdings	16.6% Expedia Group	14.6% Other OTA groups

Booking.com alone accounts for 66.1% of OTA bookings; the 68.8% figure refers to Booking Holdings as a group.

Long-term structural shift

Channel	2013	2025	Long-term change
Direct bookings	57.6%	51.3%	-6.3 percentage points
OTA bookings	19.7%	29.9%	+10.2 percentage points

Independent hotels and SME angle

Within OTA bookings, Booking.com accounts for 69.4% among independent hotels versus 56.3% among hotel chains.

Hotel-chain comparison

Among ten European hotel chains in the study, Booking Holdings and Expedia Group together represent almost 94% of OTA bookings.

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PLATFORM PRACTICES

Beyond commissions: transparency, control and the guest relationship

The 2026 study shows that platform-related concerns extend beyond commission levels. Hotels report challenges linked to pricing control, inventory redistribution, payment flows, cancellations and direct communication with guests.

◆ 51%	◆ 80%	◆ 44%
51% of hotels report frequent or occasional OTA undercutting.	4 in 5 of the affected hotels say they did not agree to the undercut.	44% of hotels report OTA multi-sourcing; 30% say no and 26% do not know.

Reported cancellation rates

Booking channel	Mean reported cancellation rate
Direct website	9.1% cancellation rate
Booking.com	19.0% cancellation rate
Expedia	11.7% cancellation rate

OTA payment intermediation

Service	Reported use
Booking.com Payments	65% use
Expedia Collect	43% use
Trip.com payment services	7% use

> Multi-sourcing and OTA payment intermediation are associated with guest confusion, wrong room descriptions, billing issues, overbookings, unclear responsibilities, extra staff workload and reduced control over inventory distribution.

A secondary digital capability agenda

◆ 66%	◆ 58%	◆ 83%	◆ 26%
use channel managers	have a permanent meta-search interface	of meta-search users use Google Hotel Ads	currently use AI

EU POLICY IMPLICATIONS

A real-economy test for Europe's digital rulebook: The Digital Markets Act (DMA) & Platform-to-Business (P2B) Regulation

For European hotels, effective implementation and enforcement of the DMA and the P2B Regulation matter directly for their ability to: encourage innovation; offer competitive prices through their own channels; understand how their rooms and rates are ranked and distributed; access relevant business and customer data; make use of effective internal and external redress mechanisms; and retain control over payments, inventory and the guest relationship.

HOTREC calls for:

1. **Effective DMA implementation and enforcement**
   Hotels must be able to exercise their rights in practice, including pricing freedom, payment solutions choice, and access to data.
2. **Continued commitment to preserving P2B protections**
   Hotels need to keep benefitting from essential and enforceable transparency and fairness safeguards in their relationships with all online platforms.
3. **Stronger conditions for direct distribution**
   European hospitality SMEs should be able to invest in their own digital channels and customer relationships despite platform dependence.

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