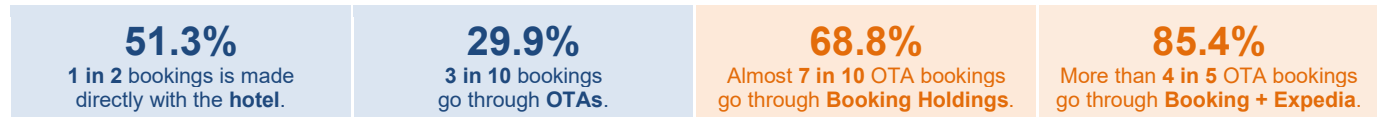


# Booking Holdings and Expedia Group account for 85% of Europe's OTA market, HOTREC study finds

Brussels, 15 September 2026 – Europe's hotel distribution market is becoming increasingly concentrated, strengthening the case for firm EU action to ensure fair and transparent digital markets. HOTREC's new European Hotel Distribution Study 2026 finds that more than 85% of OTA bookings are now controlled by just two global platform groups: Booking Holdings and Expedia Group. To protect competition and innovation in the sector, HOTREC is calling for effective enforcement of the Digital Markets Act and for the EU to preserve the key transparency and fairness protections of the Platform-to-Business Regulation.



The study, based on information from 2,713 hotels, shows that direct bookings remain resilient: half of hotel bookings (51.3%) are made directly with the hotel. Online Travel Agencies (OTAs) remain deeply embedded in hotel distribution, accounting for 3 in 10 hotel room bookings (29.9%). The longer-term shift is substantial. In 2013, around 1 in 5 hotel bookings (19.7%) were made through OTAs. By 2025, this had risen to 3 in 10 (29.9%), an increase of more than 10 percentage points over 12 years. Over the same period, the share of direct bookings declined by 6 percentage points.

The strongest finding is the high level of concentration within the OTA market, which has steadily increased over time. Booking Holdings accounted for 60% of European OTA bookings in 2013; today, its share stands at almost 70%. Together with Expedia Group, the two largest global groups now account for more than 85% of all OTA bookings in Europe. This matters particularly for Europe's independent hotels and SMEs, due to increasing dependency and risk to innovation in the sector.

The study also highlights challenges that go beyond market share and commission costs. More than half of hotels (51%) now report that OTAs undercut their prices frequently or occasionally, up from around 4 in 10 (43%) in 2023. Among affected hotels, 4 in 5 (80%) say they had not agreed to the lower price being offered. Meanwhile, more than 2 in 5 hotels (44%) report OTA multi-sourcing, where rates or availability can be redistributed through other platforms or intermediaries. Hotels report that this can lead to price inconsistencies, guest confusion, billing difficulties, incorrect information and reduced control over inventory.

The findings reinforce the importance of Europe's digital rules for the hospitality sector. With Booking Holdings as a designated gatekeeper under the Digital Markets Act (DMA), and the Platform-to-Business Regulation (P2B) at risk under the proposed Digital Omnibus, HOTREC calls for the effective implementation and enforcement of the DMA and the preservation of the P2B Regulation's essential transparency and fairness safeguards. These protections are vital to ensure that hospitality SMEs retain meaningful control over pricing, payments, distribution, data and guest relationships, while giving the next generation of hospitality entrepreneurs room to grow.

**Alexandros Vassilikos, President of HOTREC, stated:**

"Hotels need digital platforms, but they also need genuine choice. Growing concentration must not translate into growing dependency. Europe's hotels, most of them SMEs, need a competitive and transparent marketplace where they can choose how to reach their guests and remain in control of their own business."

**Marie Audren, Director General of HOTREC, commented:**

"Europe's digital rules are not only about search engines, social media or app stores. For thousands of hotels, a gatekeeper platform stands directly between the business and its guest. With 85% of OTA bookings going through just two global groups, robust enforcement of the Digital Markets Act is essential to protect competition, expand consumer choice, support innovation and safeguard Europe's SMEs."

# European Hotel Distribution Study 2026: Main Findings

- **Half of hotel room bookings remain direct:** 51.3% of bookings are generated via hotels' own channels.
- **Almost 7 in 10 OTA bookings go through Booking Holdings:** its share stands at 68.8%; Booking.com alone accounts for 66.1%.
- **1 in 2 hotels report OTA undercutting:** 51% report it frequently or occasionally, compared with 43% in 2023.
- **More than 2 in 5 hotels report multi-sourcing:** 44% say they experience the practice.
- **AI remains at an early stage:** only around 1 in 4 hotels currently use AI (26%).
- **3 in 10 bookings go through OTAs:** OTAs account for 29.9% of hotel bookings.
- **More than 4 in 5 OTA bookings are concentrated in two groups:** Booking Holdings and Expedia Group together account for 85.4%.
- **4 in 5 affected hotels say they did not agree to the undercutting,** among those answering the follow-up question.
- **Digitalisation continues:** 66% channel-manager use, 58% meta-search connectivity, 83% Google Hotel Ads among connected users.

## Background

The European Hotel Distribution Study is HOTREC's biennial barometer of hotel distribution across Europe. The 2026 edition was conducted by Professor Roland Schegg of HES-SO Valais-Wallis together with HOTREC, the European hospitality association, and national hotel associations between February and May 2026. The study covers the reference year 2025 and draws on survey information from 2,713 hotels: 1,882 individual hotel responses from 28 countries and aggregated data from 831 hotel-chain properties. This is the seventh study in a series covering developments since 2013.

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