



## Fifth HOTREC Hotel Distribution study shows how pandemic altered hotel booking habits

The 5th HOTREC Hotel distribution study, released today (14 June 2022), provides new insights on the evolution of distribution channels used to reserve hotel rooms, with a specific focus on the role of online travel agencies (OTAs).

Almost 3 900 European hoteliers from across Europe, of various locations, sizes and star-rating provided responses covering the source of reservations made during the 2021 pandemic year. Several key trends emerge from the responses, which were gathered and analysed by Prof. Roland Schegg of HES-SO Valais-Wallis Institute of Tourism:

- The **share of direct bookings has increased**, largely through reservations made by email or via hoteliers' own websites, for the first time since HOTREC began conducting this study in 2014.
- Despite more direct bookings, the results for 2021 show that **hotels' reliance on OTAs remained almost at the same level as in 2019**.
- **Booking Holding is by far the most influential player**, with a share of 71.2% in the OTA market. 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.
- **Most hoteliers (55%) feel pressured by OTAs to accept platforms' terms and conditions** that hotels would otherwise voluntarily not offer.
- In 2021, **Hotel Ads by Google is the meta-search market leader (73%)** followed by Tripadvisor (57%) and Trivago (44%). Back in 2013, Tripadvisor led the market with a usage share of 71%.

Chairman of the HOTREC Working Group on Distribution and CEO of the German Hotel Association (IHA) Markus Luthe said: *"The increase in direct bookings would be warmly welcome if it were not for the more devastating impacts of the pandemic on the European hotel sector. Direct contact with hoteliers was undeniably reassuring for travellers during the pandemic because specific concerns and queries can be easily addressed via a simple phone call or email. Important reminder: these advantages of booking directly are just as valid in normal times! We hope this trend persists during the recovery of tourism and hospitality."*

HOTREC Director General Marie Audren said: *"When it comes to online intermediation, the hotel distribution market is more than ever concentrated in the hands of one single company. We look forward to repeating this study in 2024 and 2026 to concretely assess the impacts of new EU rules affecting online platforms, like the Digital Markets and Services Act."*

HOTREC wishes to warmly thank its Members and European hoteliers for actively contributing to the study and to Prof. Roland Schegg for processing results for a fifth time. The full results of the study can be downloaded [here](#).

For further information: [www.hotrec.eu](http://www.hotrec.eu)

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### What is HOTREC?

HOTREC is the umbrella Association of Hotels, Restaurants, Bars and Cafés and similar establishments in Europe, which brings together 47 National associations in 36 countries, and is the voice of the European hospitality. HOTREC's mission is to represent and champion its interests towards the EU and international institutions, foster knowledge sharing and best practice among its Members to further promote innovation, and act as a platform of expertise for the hospitality sector.