European Hotel Distribution Study

Results for the Reference Year 2015

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Executive Summary

Evolutions in the distribution market between 2013 and 2015

- This years' distribution study of HOTREC shows, that between 2013 and 2015 the dependency of hotels on Online Travel Agencies (OTA) was rising and the share of direct bookings was declining.
- The share of direct bookings has decreased across Europe by around 4 percentage points from 59,4% in 2013 to 55,2% in 2015.
- The share of OTAs in hotel room bookings increased by around 3%, i.e. from 19,3% to 22,3%, over the last 2 years.

Executive Summary

Dependency on Online Travel Agents

- The study shows that especially the small hotel segments (with less than 20 rooms and between 20 and 50 rooms) are significantly more dependent on OTAs (27,5% resp. 23,1%) than the average hotel (22,3%).
- Chains are significantly less dependent on OTAs (18,3%) than the average of all hotels (22,3%).
- The dependency increased between 2013 and 2015 both in the case of smaller hotels and bigger hotels, as well as in the case of individual and, to a slightly lesser extent, of chain hotels.

Executive Summary

Who dominates the Online Travel Agent market?

- The 3 main market players within the OTA market remain Priceline (Booking.com), Expedia and HRS, with an aggregated market share of almost 92%.
- These 3 players could slightly increase their overall share within the OTA market over the past 2 years.
- Priceline Group (Booking.com) is by far the most influential, with a share of 62,9%. The dominance of Booking.com has been rising over the last 2 years by almost 3% between 2013 and 2015 (i.e. from 59,5% to 62,2%).
- The Expedia Group could also increase its market share by around 2,3% to 16,8%, while HRS Group lost market shares and ranks now third in the OTA market with a share of almost 11,9%.

Executive Summary

Evolutions in competition between OTAs since summer 2015?

- Following the introduction of the so called 'narrow parity clauses' by Booking.com and Expedia in summer 2015, the vast majority of hoteliers have not experienced an increased competition between OTAs. **Only 8,5% of them reported having received any reduction in commission rates to be paid to OTAs** (which ought to be seen as a sign of growing competition) since summer 2015.
- More significantly, among the few ones having received any reduction in commission fees, smaller and independent hotels have significantly much less benefited from such reduction, compared to chains or big hotels.

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The survey

The survey: background

- In order to draw a more 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), **HOTREC**, the umbrella association of Hotels, Restaurants and Cafés in Europe, has decided to conduct an online survey together with hotel associations from HOTREC member countries across Europe for the **reference year 2015**.
- A similar study was conducted in 2014 for the **reference year 2013** allowing to illustrate the evolution of distribution channels and players between 2013 and 2015.

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 how hoteliers manage online distribution channels and the use of 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, amount of overnight stays, its location, main target group, etc.)

➢ See **annex 1** for a copy of the questionnaire

The survey administration

- The questionnaire was translated in 20 languages with the help of the respective national hotel organizations.
- The survey was addressed to the member hotels of the different hotel associations and **conducted between February and April 2016**. The collected data cover the **reference year 2015**.
- The different hotel associations contacted their members either by email or through newsletters. Some associations published a link on their own website. For these cases a specific “public” link has been created.
- In addition to information of individual hotel owners, **data from hotel chains** could be integrated, either on an **aggregated level (country)** or a **property-level**.

Methodological remarks: sampling

- Overall 2031 responses from individual hotels could be collected. Yet response rates by country vary strongly in the survey (see following slide).
- Data from 8 hotel chains allowed to integrate further 179 responses on a property-level leading to an overall sample size of **2210** valid observations.
- For six countries, **aggregated data** from 6 **hotel chains** comprising 753 hotels could be integrated into the analysis:
  - Denmark: 1 chain with 22 hotels
  - Germany: 6 chains with 587 hotels
  - Hungary: 1 chain with 20 hotels
  - Finland: 1 chain with 27 hotels
  - Norway: 1 chain with 83 hotels
  - Sweden: 1 chain with 83 hotels

  In Sweden additional external data (n=244) from a survey conducted by Visita could be used for a comparison. Visita represents approximately 7,000 hotels, restaurants and other enterprises in the Swedish hospitality sector.

Number of survey responses by country

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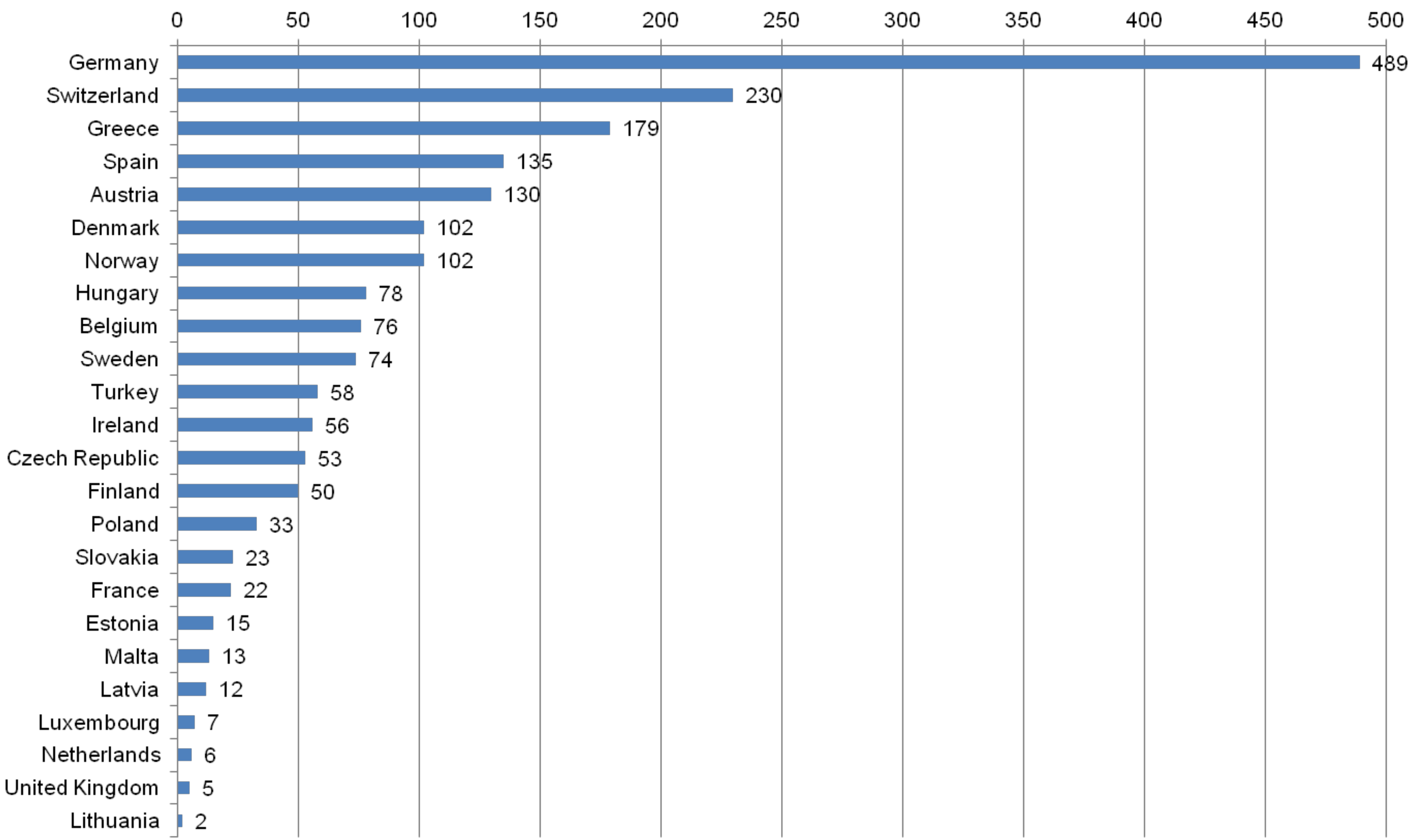

Hotrec Hospitality Europe

Sample: Overview on data from hotel chains

Country	N° of chains	N° of hotels	Rooms
Austria	1	1	141
Belgium	1	1	100
Denmark	2	25	4'604
Finland	1	27	4'691
France	2	8	2'631
Germany	6	587	76'433
Greece	1	1	152
Hungary	1	20	5'049
Lithuania	1	1	200
Netherlands	2	5	1'077
Norway	2	83	15'628
Poland	1	2	307
Sweden	2	154	26'655
Switzerland	2	6	1'445
Turkey	2	7	1'480
United Kingdom	1	3	1'020
Total		**931**	**141'613**

Chain hotel data integrated as individual observations in survey
N° hotels 178
Chain hotel data integrated in study as aggregated observations
N° hotels 753

Response rates by country

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Country	Nbr of responses survey	Number of hotels and similar 2014 (Eurostat)	Response rate on overall number of hotels in country	Number of overnights 2014 [national stats]	Relativ weight (overnights)
Austria	**130**	12839	1.0%	85'311'355	5.6%
Belgium	**76**	1653	4.6%	19'007'946	1.3%
Czech Republic	**53**	5833	0.9%	31'686'694	2.1%
Denmark	**102**	533	19.1%	13'780'467	0.9%
Estonia	15	410	3.7%	4'805'892	0.3%
Finland	**50**	785	6.4%	15'965'905	1.1%
France	22	17336	0.1%	201'894'087	13.3%
Germany	**489**	33997	1.4%	263'158'333	17.4%
Greece	**179**	10123	1.8%	73'951'641	4.9%
Hungary	**78**	2123	3.7%	20'072'124	1.3%
Ireland	**56**	2438	2.3%	23'782'525	1.6%
Latvia	12	258	4.7%	3'307'837	0.2%
Lithuania	2	421	0.5%	3'543'426	0.2%
Luxembourg	7	236	3.0%	1'698'773	0.1%
Malta	13	149	8.7%	8'532'592	0.6%
Netherlands	6	3561	0.2%	39'863'690	2.6%
Norway	**102**	1145	8.9%	20'588'727	1.4%
Poland	33	3646	0.9%	35'649'237	2.4%
Slovakia	23	1397	1.6%	17'316'583	1.1%
Spain	**135**	19563	0.7%	295'260'630	19.5%
Sweden	**74**	2033	3.6%	31'073'612	2.1%
Switzerland	**230**	5129	4.5%	35'933'512	2.4%
Turkey	**58**	3125	1.9%	88'886'000	5.9%
United Kingdom	5	40272	0.0%	178'225'113	11.8%
Unknown countries	260				
Total	***2'210***	***169'005***	***84%***	***1'513'296'701***	***100%***

Source: Survey, Eurostat

Weighting factors

Country	Nbr of responses survey	Number of overnights 2014 [national stats]	Relativ weight (overnights)
Austria	**130**	85'311'355	4.4%
Belgium	**76**	19'007'946	1.0%
Czech Republic	**53**	31'686'694	1.6%
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Spain	**135**	295'260'630	15.3%
Sweden	**74**	31'073'612	1.6%
Switzerland	**230**	35'933'512	1.9%
Turkey	**58**	88'886'000	4.6%
Bulgaria, Croatia, Cyprus, Estonia, France, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Slovakia, Slovenia, United Kingdom	398	915'912'166	47.3%
Total	***2'210***	***1'934'371'637***	***100%***

Source: Survey, Eurostat

Methodological remarks: confidence intervals

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

Methodological remarks: weighted average Europe

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

Methodological remarks: weighted average country-level

- Estimations of market shares in countries where **aggregated data from hotel chains** are available are based on a weighted average.
- The weighting takes into account the market shares (in terms of **number of rooms**) of individual hotels versus branded hotels in the country. Information from the hotel associations resp. hotel chains are used in this context.
- The following figures are used in our study:
  - Denmark: indiv. Hotels 40% / branded hotels 60%
  - Germany: indiv. Hotels 56% / branded hotels 44%
  - Hungary: indiv. Hotels 70% / branded hotels 30%
  - Finland: indiv. Hotels 56% / branded hotels 44%
  - Norway: indiv. Hotels 37% / branded hotels 63% *(situation 2012)*
  - Sweden: indiv. Hotels 56% / branded hotels 44%

Summary of sample characteristics (Europe)

- Overall, the following main observations can be made with regard to the sample characteristics (further details are in annex 2):
  - Hotel Classification – 83% of properties in the sample are classified. 3 star (45%) and 4 star (36%) hotels make up the large majority of the classified hotels in the sample.
  - Size – The average size of the hotels in the sample is 42 rooms (median value), yet one hotel out of four has less than 20 rooms.
  - Customer segment – The leisure segment is the dominant target group for 55% of hotels, followed by business clients for 36% of properties
  - Management – Two third of hotels are individual properties whereas 21% belong to a hotel chain and 11% to a hotel cooperation.

Distribution channels

Market shares of distribution channels in Europe 2015: overall sample

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Unweighted overall sample: n=2'188	Market share 2015		confidence interval (bootstrap)	
Direct - Phone	18.7	55.2	18.0	19.3
Direct - Mail / fax	2.3		2.1	2.5
Direct - Walk-In (persons without reservation)	4.8		4.5	5.1
Direct - Contact form on own website (without availabilty check)	6.1		5.7	6.6
Direct - Email	16.7		16.1	17.3
Direct - real time booking over own website with availabilty check	6.8		6.4	7.1
Destination Marketing Organization (DMO) / trade associations	0.9	1.4	0.6	1.2
National Tourism Organization (NTO)	0.6		0.3	0.9
Tour operator / Travel agency	8.0	16.3	7.4	8.7
Hotel chains and cooperations with CRS	2.6		2.2	3.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.6		2.3	2.9
Event and Congress organizer	3.1		2.8	3.5
Online Booking Agency (OTA)	22.3	25.5	21.4	23.1
Globale Distributionssysteme (GDS)	2.7		1.7	3.7
Social Media Channels	0.5		0.2	0.8
other distribution channels	1.5	1.5	0.7	2.2

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

Hotrec Hospitality Europe

Market shares of distribution channels in Europe 2013 vs 2015: overall sample

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	Market share 2015 (n=2188)		Market share 2013 (n=2221)		DELTA	
Direct - Phone	18.7	55.2	21.1	59.4	-2.5	-4.2
Direct - Mail / fax	2.3		3.1		-0.9	
Direct - Walk-In (persons without reservation)	4.8		6.0		-1.2	
Direct - Contact form on own website (without availabilty check)	6.1		6.1		-0.0	
Direct - Email	16.7		16.1		0.5	
Direct - real time booking over own website with availabilty check	6.8		6.9		-0.2	
Destination Marketing Organization (DMO) / trade associations	0.9	1.4	1.0	1.7	-0.2	-0.2
National Tourism Organization (NTO)	0.6		0.6		-0.1	
Tour operator / Travel agency	8.0	16.3	9.6	15.7	-1.6	0.6
Hotel chains and cooperations with CRS	2.6		1.4		1.2	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.6		2.8		-0.2	
Event and Congress organizer	3.1		1.9		1.2	
Online Booking Agency (OTA)	22.3	25.5	19.3	21.8	**3.0**	3.7
Globale Distributionssysteme (GDS)	2.7		2.0		0.7	
Social Media Channels	0.5		0.5		-0.0	
other distribution channels	1.5	1.5	1.5	1.5	0.0	0.0

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels in Europe 2015: <u>weighted</u> values

	Rest Europe	Austria	Belgium	Czech Republic	Denmark	Finland	Germany	Greece	Hungary	Ireland	Norway	Spain	Sweden	Switzerland	Turkey	**Weighted Values 2015**		Unweighted Values 2015	
weigthing	*47.3%*	*4.4%*	*1.0%*	*1.6%*	*0.7%*	*0.8%*	*13.6%*	*3.8%*	*1.0%*	*1.2%*	*1.1%*	*15.3%*	*1.6%*	*1.9%*	*4.6%*				
Direct - Phone	18.7	14.1	9.4	12.1	17.4	24.7	22.6	18.6	9.7	20.8	17.1	10.5	18.3	19.9	11.0	**17.2**	**52.8**	18.7	**55.2**
Direct - Mail / fax	2.3	1.7	4.5	0.8	5.6	0.5	4.4	1.3	0.6	1.7	4.6	1.8	0.8	2.0	2.7	**2.4**		2.3	
Direct - Walk-In (persons without reservation)	4.8	3.7	2.9	5.2	2.5	4.5	4.2	7.9	3.1	4.2	2.3	3.7	3.3	4.7	6.1	**4.5**		4.8	
Direct - Contact form on own website (without availabilty check)	6.1	10.7	4.6	8.1	4.1	5.5	5.3	4.9	11.7	3.3	4.5	2.6	3.0	5.0	2.6	**5.4**		6.1	
Direct - Email	16.7	24.7	17.8	22.2	13.0	15.1	18.1	9.9	17.7	6.6	17.8	8.4	11.1	21.6	16.4	**15.6**		16.7	
Direct - real time booking over own website with availabilty check	6.8	8.8	11.3	5.0	12.6	12.9	9.0	5.3	4.8	14.6	5.9	10.2	7.3	7.5	4.2	**7.7**		6.8	
Destination Marketing Organization (DMO) / trade associations	0.9	1.6	0.5	0.3	1.2	0.4	0.6	0.5	0.1	1.2	0.1	1.1	0.0	1.4	1.0	**0.9**	**1.4**	0.9	**1.4**
National Tourism Organization (NTO)	0.6	0.6	0.1	0.4	0.5	0.1	0.5	0.5	0.1	0.4	0.0	0.1	0.7	0.7	1.5	**0.5**		0.6	
Tour operator / Travel agency	8.0	6.3	2.8	13.1	2.8	4.0	2.9	19.3	11.6	11.1	2.0	12.7	19.5	4.6	20.8	**9.1**	**17.9**	8.0	**16.3**
Hotel chains and cooperations with CRS	2.6	0.5	0.3	0.3	7.4	4.4	2.6	0.4	0.7	1.0	9.1	2.6	8.1	1.1	0.5	**2.4**		2.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.6	1.3	1.0	2.0	4.5	3.6	0.9	4.4	5.5	2.1	3.3	9.0	1.5	2.3	5.6	**3.5**		2.6	
Event and Congress organizer	3.1	2.1	2.6	3.6	1.0	2.5	0.9	0.7	4.5	1.9	7.2	4.0	2.2	2.3	6.0	**2.9**		3.1	
Online Booking Agency (OTA)	22.3	21.2	36.7	23.7	20.0	16.0	24.1	22.9	25.8	25.7	15.5	27.6	18.6	20.6	17.3	**23.1**	**26.4**	22.3	**25.5**
Globale Distributionssysteme (GDS)	2.7	0.8	3.3	1.6	5.7	4.1	3.1	0.7	0.6	2.4	10.6	3.6	5.4	3.4	2.2	**2.9**		2.7	
Social Media Channels	0.5	0.4	0.4	0.3	0.7	0.1	0.2	0.9	0.6	1.0	0.0	0.3	0.0	0.4	1.1	**0.4**		0.5	
other distribution channels	1.5	1.6	1.9	1.4	1.1	1.6	0.7	2.0	2.9	2.1	0.0	1.7	0.0	2.5	1.1	**1.4**	**1.4**	1.5	**1.5**

Market shares in % of overnights. For "Rest Europe" overall sample means are used (see slide methodology for details).

Market shares of distribution channels in Europe 2013: weighted values

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2013	Rest Europe	Austria	Belgium	Czech Republic	Denmark	Finland	France	Germany	Greece	Hungary	Norway	Spain	Switzerland	Turkey	Weighted Values 2013		Unweighted Values 2013	
n		58	78	82	73	66	49	575	266	76	55	153	272	52				
weigthing	39.8%	4.4%	1.0%	1.6%	0.7%	0.8%	10.4%	13.6%	3.8%	1.0%	1.1%	15.3%	1.9%	4.6%				
Direct - Phone	21.1	13.9	14.1	17.4	22.7	32.9	20.9	27.7	22.4	12.8	24.9	16.7	20.6	11.1	**20.5**	**57.6**	21.1	**59.4**
Direct - Mail / fax	3.1	2.0	4.7	0.9	7.1	1.0	2.3	4.3	1.6	2.4	5.4	2.7	2.2	6.6	**3.2**		3.1	
Direct - Walk-In (persons without reservation)	6.0	4.0	5.4	6.1	3.7	5.0	5.2	4.9	11.0	3.5	3.8	6.1	5.9	5.6	**5.8**		6.0	
Direct - Contact form on own website (without availabilty check)	6.1	14.9	7.0	8.3	3.6	5.9	3.1	7.2	4.7	11.9	2.6	3.3	6.4	3.1	**5.8**		6.1	
Direct - Email	16.1	25.6	17.7	18.8	13.9	18.9	16.1	17.2	9.0	20.2	22.9	6.5	21.2	9.9	**14.9**		16.1	
Direct - real time booking over own website with availabilty check	6.9	7.2	12.3	6.5	7.8	6.2	11.1	6.1	6.0	5.9	8.6	8.3	7.5	5.3	**7.4**		6.9	
Destination Marketing Organization (DMO) / trade associations	1.0	3.6	0.5	0.8	0.9	2.3	1.5	0.9	0.8	0.8	0.5	0.3	1.4	1.5	**1.1**	**1.6**	1.0	**1.7**
National Tourism Organization (NTO)	0.6	0.5	0.9	0.1	0.7	0.2	0.2	0.8	0.6	0.7	0.2	0.1	1.1	0.9	**0.5**		0.6	
Tour operator / Travel agency	9.6	7.9	2.5	12.7	3.2	5.7	5.9	4.4	19.4	9.3	4.2	16.0	4.6	26.1	**10.3**	**17.2**	9.6	**15.7**
Hotel chains and cooperations with CRS	1.4	0.3	1.0	1.7	4.2	1.3	1.1	0.9	0.6	1.0	3.8	3.6	1.3	1.5	**1.6**		1.4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.8	0.9	1.8	2.0	0.9	2.9	2.6	0.7	3.9	4.6	0.8	8.6	2.7	5.3	**3.4**		2.8	
Event and Congress organizer	1.9	1.8	1.0	3.6	1.2	2.9	0.6	1.5	0.4	4.4	3.7	2.0	1.5	4.3	**1.8**		1.9	
Online Booking Agency (OTA)	19.3	15.4	27.9	18.1	22.8	11.1	24.8	20.6	16.3	19.1	9.1	21.7	19.4	12.1	**19.7**	**22.2**	19.3	**21.8**
Globale Distributionssysteme (GDS)	2.0	0.4	0.8	1.1	4.3	1.8	2.6	1.6	0.5	1.9	8.6	1.9	2.8	4.1	**2.0**		2.0	
Social Media Channels	0.5	0.5	0.8	0.4	0.4	0.3	0.2	0.2	1.3	0.4	0.8	0.5	0.3	0.7	**0.4**		0.5	
other distribution channels	1.5	1.0	1.7	1.7	2.8	1.8	2.4	1.0	1.5	1.2	0.0	1.8	1.3	1.8	**1.5**	**1.5**	1.5	**1.5**

Market shares in % of overnights. For "Rest Europe" overall sample means are used.

Market shares of distribution channels in Europe 2013 vs 2015: weighted sample

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	Weighted market share 2015		Weighted market share 2013		DELTA	
Direct - Phone	17.2	52.8	20.5	57.6	-3.4	-4.8
Direct - Mail / fax	2.4		3.2		-0.8	
Direct - Walk-In (persons without reservation)	4.5		5.8		-1.2	
Direct - Contact form on own website (without availabilty check)	5.4		5.8		-0.4	
Direct - Email	15.6		14.9		0.7	
Direct - real time booking over own website with availabilty check	7.7		7.4		0.3	
Destination Marketing Organization (DMO) / trade associations	0.9	1.4	1.1	1.6	-0.2	-0.2
National Tourism Organization (NTO)	0.5		0.5		-0.0	
Tour operator / Travel agency	9.1	17.9	10.3	17.2	-1.2	0.8
Hotel chains and cooperations with CRS	2.4		1.6		0.8	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.5		3.4		0.1	
Event and Congress organizer	2.9		1.8		1.1	
Online Booking Agency (OTA)	23.1	26.4	19.7	22.2	**3.4**	4.2
Globale Distributionssysteme (GDS)	2.9		2.0		0.8	
Social Media Channels	0.4		0.4		-0.0	
other distribution channels	1.4	1.4	1.5	1.5	-0.1	-0.1

Market shares in % of overnights.

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Distribution channels for selected countries (n>50)

- Austria
- Belgium
- Czech Republic
- Denmark
- Finland
- Germany
- Greece
- Hungary
- Ireland
- Norway
- Spain
- Sweden
- Switzerland
- Turkey

Market shares of distribution channels 2015: Austria

Unweighted sample: n=130	Market share		confidence interval (bootstrap)	
Direct - Phone	14.1	63.6	12.1	16.8
Direct - Mail / fax	1.7		1.0	2.4
Direct - Walk-In (persons without reservation)	3.7		3.0	4.5
Direct - Contact form on own website (without availability check)	10.7		8.1	13.2
Direct - Email	24.7		21.2	27.8
Direct - real time booking over own website with availability check	8.8		7.0	10.1
Destination Marketing Organization (DMO) / trade associations	1.6	2.2	0.8	2.4
National Tourism Organization (NTO)	0.6		0.1	1.1
Tour operator / Travel agency	6.3	10.2	4.6	8.3
Hotel chains and cooperations with CRS	0.5		0.1	1.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.3		0.6	2.1
Event and Congress organizer	2.1		1.2	3.0
Online Booking Agency (OTA)	21.2	22.4	17.8	25.2
Globale Distributionssysteme (GDS)	0.8		0.2	1.4
Social Media Channels	0.4		0.0	0.8
other distribution channels	1.6	1.6	0.8	2.4

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

Market shares of distribution channels in Austria: 2013 vs 2015

	Market share 2015 (n=130)		Market share 2013 (n=58)		DELTA	
Direct - Phone	14.1	63.6	13.9	67.6	0.19	-3.99
Direct - Mail / fax	1.7		2.0		-0.33	
Direct - Walk-In (persons without reservation)	3.7		4.0		-0.29	
Direct - Contact form on own website (without availabilty check)	10.7		14.9		-4.21	
Direct - Email	24.7		25.6		-0.90	
Direct - real time booking over own website with availabilty check	8.8		7.2		1.55	
Destination Marketing Organization (DMO) / trade associations	1.6	2.2	3.6	4.1	-2.00	-1.90
National Tourism Organization (NTO)	0.6		0.5		0.10	
Tour operator / Travel agency	6.3	10.2	7.9	11.0	-1.61	-0.78
Hotel chains and cooperations with CRS	0.5		0.3		0.19	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.3		0.9		0.40	
Event and Congress organizer	2.1		1.8		0.24	
Online Booking Agency (OTA)	21.2	22.4	15.4	16.3	5.83	6.14
Globale Distributionssysteme (GDS)	0.8		0.4		0.40	
Social Media Channels	0.4		0.5		-0.09	
other distribution channels	1.6	1.6	1.0	1.0	0.53	0.53

Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels 2015: Belgium

Unweighted sample: n=76	Market share		confidence interval (bootstrap)	
Direct - Phone	9.4	50.4	7.7	11.5
Direct - Mail / fax	4.5		2.4	7.1
Direct - Walk-In (persons without reservation)	2.9		2.0	3.8
Direct - Contact form on own website (without availability check)	4.6		2.3	7.3
Direct - Email	17.8		13.8	21.5
Direct - real time booking over own website with availability check	11.3		8.8	14.2
Destination Marketing Organization (DMO) / trade associations	0.5	0.6	0.1	1.1
National Tourism Organization (NTO)	0.1		0.0	0.3
Tour operator / Travel agency	2.8	6.7	1.9	3.8
Hotel chains and cooperations with CRS	0.3		0.0	0.6
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		0.4	1.5
Event and Congress organizer	2.6		1.5	3.6
Online Booking Agency (OTA)	36.7	40.5	32.3	41.7
Globale Distributionssysteme (GDS)	3.3		2.3	4.3
Social Media Channels	0.4		0.0	0.8
other distribution channels	1.9	1.9	1.2	2.7

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

Market shares of distribution channels in Belgium: 2013 vs 2015

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	Market share 2015 (n=76)		Market share 2013 (n=78)		DELTA	
Direct - Phone	9.4	50.4	14.1	61.2	-4.67	-10.75
Direct - Mail / fax	4.5		4.7		-0.19	
Direct - Walk-In (persons without reservation)	2.9		5.4		-2.50	
Direct - Contact form on own website (without availabilty check)	4.6		7.0		-2.39	
Direct - Email	17.8		17.7		0.04	
Direct - real time booking over own website with availabilty check	11.3		12.3		-1.04	
Destination Marketing Organization (DMO) / trade associations	0.5	0.6	0.5	1.4	0.00	-0.77
National Tourism Organization (NTO)	0.1		0.9		-0.77	
Tour operator / Travel agency	2.8	6.7	2.5	6.3	0.22	0.35
Hotel chains and cooperations with CRS	0.3		1.0		-0.75	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		1.8		-0.77	
Event and Congress organizer	2.6		1.0		1.65	
Online Booking Agency (OTA)	36.7	40.5	27.9	29.5	8.80	10.99
Globale Distributionssysteme (GDS)	3.3		0.8		2.56	
Social Media Channels	0.4		0.8		-0.37	
other distribution channels	1.9	1.9	1.7	1.7	0.19	0.19

Unweighted samples. Market shares in % of overnights.

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Market shares of distribution channels 2015: Czech Republic

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Unweighted sample: n=52	Market share		confidence interval (bootstrap)	
Direct - Phone	12.1	53.4	9.3	15.9
Direct - Mail / fax	0.8		0.3	1.3
Direct - Walk-In (persons without reservation)	5.2		3.7	6.5
Direct - Contact form on own website (without availability check)	8.1		4.9	11.9
Direct - Email	22.2		17.8	26.9
Direct - real time booking over own website with availability check	5.0		3.4	6.8
Destination Marketing Organization (DMO) / trade associations	0.3	0.7	0.0	0.6
National Tourism Organization (NTO)	0.4		0.1	0.7
Tour operator / Travel agency	13.1	19.0	8.9	19.5
Hotel chains and cooperations with CRS	0.3		0.0	0.6
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.0		1.2	2.7
Event and Congress organizer	3.6		2.6	4.6
Online Booking Agency (OTA)	23.7	25.6	19.0	29.9
Globale Distributionssysteme (GDS)	1.6		0.8	2.4
Social Media Channels	0.3		0.0	0.6
other distribution channels	1.4	1.4	0.7	2.1

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

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Market shares of distribution channels in Czech Republic: 2013 vs 2015

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	Market share 2015 (n=52)		Market share 2013 (n=82)		DELTA	
Direct - Phone	12.1	53.4	17.4	58.0	-5.27	-4.60
Direct - Mail / fax	0.8		0.9		-0.14	
Direct - Walk-In (persons without reservation)	5.2		6.1		-0.90	
Direct - Contact form on own website (without availabilty check)	8.1		8.3		-0.25	
Direct - Email	22.2		18.8		3.40	
Direct - real time booking over own website with availabilty check	5.0		6.5		-1.44	
Destination Marketing Organization (DMO) / trade associations	0.3	0.7	0.8	0.9	-0.46	-0.17
National Tourism Organization (NTO)	0.4		0.1		0.29	
Tour operator / Travel agency	13.1	19.0	12.7	19.9	0.45	-0.92
Hotel chains and cooperations with CRS	0.3		1.7		-1.41	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.0		2.0		-0.01	
Event and Congress organizer	3.6		3.6		0.05	
Online Booking Agency (OTA)	23.7	25.6	18.1	19.6	5.64	5.97
Globale Distributionssysteme (GDS)	1.6		1.1		0.49	
Social Media Channels	0.3		0.4		-0.16	
other distribution channels	1.4	1.4	1.7	1.7	-0.28	-0.28

Unweighted samples. Market shares in % of overnights.

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Market shares of distribution channels 2015: Denmark

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Unweighted sample: n=98	Market share		confidence interval (bootstrap)	
Direct - Phone	19.6	56.8	16.4	23.1
Direct - Mail / fax	5.0		3.2	7.4
Direct - Walk-In (persons without reservation)	2.7		2.0	3.4
Direct - Contact form on own website (without availability check)	5.1		3.1	7.6
Direct - Email	15.5		12.3	18.1
Direct - real time booking over own website with availability check	8.9		6.5	12.3
Destination Marketing Organization (DMO) / trade associations	1.4	2.1	0.9	1.9
National Tourism Organization (NTO)	0.7		0.2	1.2
Tour operator / Travel agency	4.3	11.1	3.0	6.4
Hotel chains and cooperations with CRS	3.7		2.8	4.6
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.8		1.1	2.5
Event and Congress organizer	1.2		0.6	1.8
Online Booking Agency (OTA)	24.7	28.5	20.4	29.0
Globale Distributionssysteme (GDS)	2.9		2.1	3.8
Social Media Channels	1.0		0.5	1.5
other distribution channels	1.4	1.4	0.7	2.1

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

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Market shares of distribution channels in Denmark : 2013 vs 2015

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	Market share 2015		Market share 2013		DELTA	
Direct - Phone	19.6	56.8	22.7	58.7	-3.04	-1.93
Direct - Mail / fax	5.0		7.1		-2.13	
Direct - Walk-In (persons without reservation)	2.7		3.7		-0.98	
Direct - Contact form on own website (without availabilty check)	5.1		3.6		1.50	
Direct - Email	15.5		13.9		1.63	
Direct - real time booking over own website with availabilty check	8.9		7.8		1.09	
Destination Marketing Organization (DMO) / trade associations	1.4	2.1	0.9	1.6	0.54	0.57
National Tourism Organization (NTO)	0.7		0.7		0.03	
Tour operator / Travel agency	4.3	11.1	3.2	9.5	1.14	1.65
Hotel chains and cooperations with CRS	3.7		4.2		-0.45	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.8		0.9		0.91	
Event and Congress organizer	1.2		1.2		0.05	
Online Booking Agency (OTA)	24.7	28.5	22.8	27.5	**1.96**	1.07
Globale Distributionssysteme (GDS)	2.9		4.3		-1.45	
Social Media Channels	1.0		0.4		0.56	
other distribution channels	1.4	1.4	2.8	2.8	-1.43	-1.43

Unweighted samples. Market shares in % of overnights.
2015: n=98. 2013: n=73

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Weighted market shares of distribution channels 2015: Denmark

	SME hotels 2015 (n=57)		Chain hotels 2015 (n=63)		Weighted average	
weighting	40%		60%			
Direct - Phone	20.8	60.7	17.2	52.0	18.7	55.5
Direct - Mail / fax	3.1		7.2		5.5	
Direct - Walk-In (persons without reservation)	2.6		2.7		2.6	
Direct - Contact form on own website (without availabilty check)	6.1		3.5		4.5	
Direct - Email	17.7		11.9		14.2	
Direct - real time booking over own website with availabilty check	10.4		9.6		9.9	
Destination Marketing Organization (DMO) / trade associations	0.7	1.2	2.0	2.8	1.5	2.2
National Tourism Organization (NTO)	0.6		0.7		0.7	
Tour operator / Travel agency	5.0	8.8	2.8	16.1	3.7	13.2
Hotel chains and cooperations with CRS	0.6		9.0		5.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.5		2.8		2.6	
Event and Congress organizer	0.7		1.6		1.3	
Online Booking Agency (OTA)	26.5	28.7	20.1	27.1	22.7	27.8
Globale Distributionssysteme (GDS)	1.5		5.8		4.1	
Social Media Channels	0.7		1.1		0.9	
other distribution channels	0.6	0.6	2.0	2.0	1.4	1.4

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

Weighted market shares of distribution channels 2013: Denmark

	SME hotels 2013 (n=33)		Chain hotels 2013 (n=40)		Weighted average	
weighting	40%		60%			
Direct - Phone	25.4	63.1	20.5	55.2	21.9	57.5
Direct - Mail / fax	6.5		7.6		7.3	
Direct - Walk-In (persons without reservation)	4.3		3.2		3.5	
Direct - Contact form on own website (without availabilty check)	3.8		3.4		3.5	
Direct - Email	16.0		12.2		13.3	
Direct - real time booking over own website with availabilty check	7.1		8.4		8.0	
Destination Marketing Organization (DMO) / trade associations	0.4	0.9	1.3	2.1	1.0	1.7
National Tourism Organization (NTO)	0.6		0.8		0.7	
Tour operator / Travel agency	3.0	6.5	3.3	12.0	3.2	10.3
Hotel chains and cooperations with CRS	1.2		6.6		5.0	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.3		0.6		0.8	
Event and Congress organizer	0.9		1.4		1.3	
Online Booking Agency (OTA)	26.7	28.6	19.5	26.5	21.7	27.1
Globale Distributionssysteme (GDS)	1.8		6.4		5.0	
Social Media Channels	0.0		0.7		0.5	
other distribution channels	1.0	1.0	4.3	4.3	3.3	3.3

Market shares in % of overnights.

Weighted market shares of distribution channels in Denmark : 2013 vs 2015

	Market share 2015 (n=120)		Market share 2013 (n=73)		DELTA	
Direct - Phone	18.7	55.5	21.9	57.5	-3.3	-2.0
Direct - Mail / fax	5.5		7.3		-1.7	
Direct - Walk-In (persons without reservation)	2.6		3.5		-0.9	
Direct - Contact form on own website (without availabilty check)	4.5		3.5		1.0	
Direct - Email	14.2		13.3		0.9	
Direct - real time booking over own website with availabilty check	9.9		8.0		1.9	
Destination Marketing Organization (DMO) / trade associations	1.5	2.2	1.0	1.7	0.5	0.4
National Tourism Organization (NTO)	0.7		0.7		-0.0	
Tour operator / Travel agency	3.7	13.2	3.2	10.3	0.4	2.9
Hotel chains and cooperations with CRS	5.6		5.0		0.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.6		0.8		1.8	
Event and Congress organizer	1.3		1.3		-0.0	
Online Booking Agency (OTA)	22.7	27.8	21.7	27.1	1.0	0.6
Globale Distributionssysteme (GDS)	4.1		5.0		-0.9	
Social Media Channels	0.9		0.5		0.4	
other distribution channels	1.4	1.4	3.3	3.3	-1.9	-1.9

Market shares in % of overnights.

Market shares of distribution channels 2015: Finland

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Unweighted sample: n=50	Market share		confidence interval (bootstrap)	
Direct - Phone	27.9	65.2	23.3	33.1
Direct - Mail / fax	0.6		0.2	1.0
Direct - Walk-In (persons without reservation)	4.9		3.3	7.3
Direct - Contact form on own website (without availability check)	6.4		3.5	10.1
Direct - Email	17.4		14.1	20.4
Direct - real time booking over own website with availability check	7.9		4.9	10.8
Destination Marketing Organization (DMO) / trade associations	0.6	0.9	0.2	1.0
National Tourism Organization (NTO)	0.3		0.0	0.6
Tour operator / Travel agency	5.3	13.6	2.6	8.3
Hotel chains and cooperations with CRS	3.1		2.4	3.8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		1.2	2.0
Event and Congress organizer	3.5		2.7	4.3
Online Booking Agency (OTA)	16.2	18.4	11.6	21.4
Globale Distributionssysteme (GDS)	2.0		1.5	2.5
Social Media Channels	0.2		0.0	0.4
other distribution channels	2.0	2.0	1.5	2.5

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

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Market shares of distribution channels in Finland: 2013 vs 2015

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	Market share 2015 (n=50)		Market share 2013 (n=66)		DELTA	
Direct - Phone	27.9	65.2	32.9	69.8	-4.93	-4.59
Direct - Mail / fax	0.6		1.0		-0.39	
Direct - Walk-In (persons without reservation)	4.9		5.0		-0.05	
Direct - Contact form on own website (without availabilty check)	6.4		5.9		0.58	
Direct - Email	17.4		18.9		-1.47	
Direct - real time booking over own website with availabilty check	7.9		6.2		1.67	
Destination Marketing Organization (DMO) / trade associations	0.6	0.9	2.3	2.5	-1.72	-1.64
National Tourism Organization (NTO)	0.3		0.2		0.08	
Tour operator / Travel agency	5.3	13.6	5.7	12.8	-0.34	0.81
Hotel chains and cooperations with CRS	3.1		1.3		1.81	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		2.9		-1.27	
Event and Congress organizer	3.5		2.9		0.61	
Online Booking Agency (OTA)	16.2	18.4	11.1	13.2	**5.12**	5.16
Globale Distributionssysteme (GDS)	2.0		1.8		0.14	
Social Media Channels	0.2		0.3		-0.10	
other distribution channels	2.0	2.0	1.8	1.8	0.26	0.26

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Weighted market shares of distribution channels 2015: Finland

	SME hotels 2015 (n=34)		Chain hotels 2015 (n=43)		Weighted average	
weighting	56%		44%			
Direct - Phone	29.2	68.9	19.0	55.8	24.7	63.2
Direct - Mail / fax	0.7		0.2		0.5	
Direct - Walk-In (persons without reservation)	4.3		4.7		4.5	
Direct - Contact form on own website (without availabilty check)	8.4		1.7		5.5	
Direct - Email	20.2		8.7		15.1	
Direct - real time booking over own website with availabilty check	6.2		21.4		12.9	
Destination Marketing Organization (DMO) / trade associations	0.4	0.4	0.4	0.7	0.4	0.5
National Tourism Organization (NTO)	0.0		0.3		0.1	
Tour operator / Travel agency	6.1	12.3	1.4	17.4	4.0	14.5
Hotel chains and cooperations with CRS	1.6		8.1		4.4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		6.7		3.6	
Event and Congress organizer	3.4		1.3		2.5	
Online Booking Agency (OTA)	14.2	15.7	18.3	25.9	16.0	20.2
Globale Distributionssysteme (GDS)	1.4		7.5		4.1	
Social Media Channels	0.2		0.1		0.1	
other distribution channels	2.7	2.7	0.2	0.2	1.6	1.6

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

Weighted market shares of distribution channels 2013: Finland

	SME hotels 2013 (n=47)		Chain hotels 2013 (n=19)		Weighted average	
weighting	56%		44%			
Direct - Phone	38.2	73.9	19.6	59.6	25.2	63.9
Direct - Mail / fax	0.5		2.1		1.6	
Direct - Walk-In (persons without reservation)	3.9		7.7		6.6	
Direct - Contact form on own website (without availabilty check)	7.0		3.0		4.2	
Direct - Email	19.6		17.2		17.9	
Direct - real time booking over own website with availabilty check	4.7		10.1		8.4	
Destination Marketing Organization (DMO) / trade associations	3.0	3.0	0.7	1.3	1.4	1.8
National Tourism Organization (NTO)	0.0		0.5		0.4	
Tour operator / Travel agency	6.7	12.0	3.1	14.6	4.2	13.8
Hotel chains and cooperations with CRS	0.1		4.3		3.0	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.1		4.9		4.1	
Event and Congress organizer	3.2		2.3		2.6	
Online Booking Agency (OTA)	8.9	9.7	16.7	21.7	14.3	18.1
Globale Distributionssysteme (GDS)	0.5		5.0		3.7	
Social Media Channels	0.3		0.1		0.1	
other distribution channels	1.3	1.3	2.8	2.8	2.4	2.4

Market shares in % of overnights.

Weighted market shares of distribution channels in Finland: 2013 vs 2015

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	Market share 2015 (n=77)		Market share 2013 (n=66)		DELTA	
Direct - Phone	24.7	63.2	30.0	67.6	-5.3	-4.5
Direct - Mail / fax	0.5		1.2		-0.7	
Direct - Walk-In (persons without reservation)	4.5		5.6		-1.1	
Direct - Contact form on own website (without availabilty check)	5.5		5.2		0.2	
Direct - Email	15.1		18.5		-3.4	
Direct - real time booking over own website with availabilty check	12.9		7.0		5.9	
Destination Marketing Organization (DMO) / trade associations	0.4	0.5	2.0	2.2	-1.6	-1.7
National Tourism Organization (NTO)	0.1		0.3		-0.1	
Tour operator / Travel agency	4.0	14.5	5.1	13.2	-1.1	1.4
Hotel chains and cooperations with CRS	4.4		1.9		2.5	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.6		3.3		0.3	
Event and Congress organizer	2.5		2.8		-0.3	
Online Booking Agency (OTA)	16.0	20.2	12.3	15.0	3.7	5.2
Globale Distributionssysteme (GDS)	4.1		2.5		1.6	
Social Media Channels	0.1		0.2		-0.1	
other distribution channels	1.6	1.6	2.0	2.0	-0.4	-0.4

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2015: Germany

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Unweighted sample: n=485	Market share		confidence interval (bootstrap)	
Direct - Phone	26.3	65.5	24.7	27.9
Direct - Mail / fax	3.1		2.6	3.5
Direct - Walk-In (persons without reservation)	5.5		5.0	6.1
Direct - Contact form on own website (without availability check)	7.8		6.8	9.2
Direct - Email	16.6		15.5	17.6
Direct - real time booking over own website with availability check	6.3		5.5	7.1
Destination Marketing Organization (DMO) / trade associations	1.0	1.8	0.6	1.4
National Tourism Organization (NTO)	0.8		0.5	1.1
Tour operator / Travel agency	3.4	5.7	2.6	4.1
Hotel chains and cooperations with CRS	0.7		0.4	1.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.5		0.2	0.8
Event and Congress organizer	1.1		0.7	1.5
Online Booking Agency (OTA)	24.5	25.9	22.9	26.1
Globale Distributionssysteme (GDS)	1.1		0.7	1.5
Social Media Channels	0.3		0.0	0.6
other distribution channels	1.1	1.1	0.7	1.5

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

Hotrec Hospitality Europe

Market shares of distribution channels in Germany: 2013 vs 2015

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	Market share 2015 (n=485)		Market share 2013 (n=575)		DELTA	
Direct - Phone	26.3		27.7		-1.37	
Direct - Mail / fax	3.1		4.3		-1.23	
Direct - Walk-In (persons without reservation)	5.5		4.9		0.55	
Direct - Contact form on own website (without availabilty check)	7.8	65.5	7.2	67.3	0.65	-1.84
Direct - Email	16.6		17.2		-0.61	
Direct - real time booking over own website with availabilty check	6.3		6.1		0.17	
Destination Marketing Organization (DMO) / trade associations	1.0	1.8	0.9	1.7	0.10	0.08
National Tourism Organization (NTO)	0.8		0.8		-0.02	
Tour operator / Travel agency	3.4		4.4		-1.07	
Hotel chains and cooperations with CRS	0.7		0.9		-0.24	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.5	5.7	0.7	7.6	-0.15	-1.89
Event and Congress organizer	1.1		1.5		-0.43	
Online Booking Agency (OTA)	24.5		20.6		**3.95**	
Globale Distributionssysteme (GDS)	1.1	25.9	1.6	22.4	-0.46	3.55
Social Media Channels	0.3		0.2		0.06	
other distribution channels	1.1	1.1	1.0	1.0	0.07	0.07

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

<u>Weighted</u> market shares of distribution channels in Germany: 2015

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	SME hotels 2015 (n=409)		Chain hotels 2015 (n=585)		Weighted average	
weighting	56%		44%			
Direct - Phone	26.8	66.6	17.3	59.6	22.6	63.5
Direct - Mail / fax	3.0		6.1		4.4	
Direct - Walk-In (persons without reservation)	5.7		2.3		4.2	
Direct - Contact form on own website (without availabilty check)	8.6		1.0		5.3	
Direct - Email	17.0		19.5		18.1	
Direct - real time booking over own website with availabilty check	5.5		13.4		9.0	
Destination Marketing Organization (DMO) / trade associations	1.0	1.9	0.1	0.1	0.6	1.1
National Tourism Organization (NTO)	0.9		0.0		0.5	
Tour operator / Travel agency	3.3	4.8	2.4	10.6	2.9	7.3
Hotel chains and cooperations with CRS	0.2		5.7		2.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		1.5		0.9	
Event and Congress organizer	0.8		1.0		0.9	
Online Booking Agency (OTA)	24.6	25.6	23.5	29.6	24.1	27.4
Globale Distributionssysteme (GDS)	0.7		6.1		3.1	
Social Media Channels	0.3		0.0		0.2	
other distribution channels	1.1	1.1	0.1	0.1	0.7	0.7

Market shares in % of overnights.

Hotrec Hospitality Europe

Weighted market shares of distribution channels in Germany: 2013 vs 2015

	Market share 2015 (n=994)			Market share 2013 (n=966)		DELTA	
Direct - Phone	22.6						
Direct - Mail / fax	4.4						
Direct - Walk-In (persons without reservation)	4.2	54.5		55.6		-1.0	
Direct - Contact form on own website (without availabilty check)	5.3		63.5		63.7		-0.2
Direct - Email	18.1						
Direct - real time booking over own website with availabilty check	9.0	9.0		8.1		0.9	
Destination Marketing Organization (DMO) / trade associations	0.6		1.1	0.7	1.2	-0.0	-0.1
National Tourism Organization (NTO)	0.5			0.6		-0.1	
Tour operator / Travel agency	2.9			4.3		-1.4	
Hotel chains and cooperations with CRS	2.6			0.4		2.2	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.9		7.3	1.2	10.7	-0.3	-3.3
Event and Congress organizer	0.9			4.8		-3.9	
Online Booking Agency (OTA)	24.1			20.9		3.3	
Globale Distributionssysteme (GDS)	3.1		27.4	2.6	23.7	0.5	3.7
Social Media Channels	0.2			0.2		-0.0	
other distribution channels	0.7		0.7	0.7	0.7	-0.1	-0.1

Market shares in % of overnights.

Market shares of distribution channels 2015: Greece

Unweighted sample: n=179	Market share		confidence interval (bootstrap)	
Direct - Phone	18.6	47.8	16.3	21.5
Direct - Mail / fax	1.3		0.8	1.8
Direct - Walk-In (persons without reservation)	7.9		6.5	9.5
Direct - Contact form on own website (without availability check)	4.9		3.6	6.7
Direct - Email	9.9		8.4	11.5
Direct - real time booking over own website with availability check	5.3		4.1	6.5
Destination Marketing Organization (DMO) / trade associations	0.5	1.0	0.2	0.8
National Tourism Organization (NTO)	0.5		0.2	0.8
Tour operator / Travel agency	19.3	24.7	15.1	23.2
Hotel chains and cooperations with CRS	0.4		0.1	0.7
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.4		3.1	5.5
Event and Congress organizer	0.7		0.3	1.1
Online Booking Agency (OTA)	22.9	24.5	19.4	26.0
Globale Distributionssysteme (GDS)	0.7		0.3	1.1
Social Media Channels	0.9		0.5	1.3
other distribution channels	2.0	2.0	1.5	2.5

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

Market shares of distribution channels in Greece: 2013 vs 2015

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	Market share 2015 (n=179)		Market share 2013 (n=266)		DELTA	
Direct - Phone	18.6	47.8	22.4	54.7	-3.75	-6.86
Direct - Mail / fax	1.3		1.6		-0.31	
Direct - Walk-In (persons without reservation)	7.9		11.0		-3.15	
Direct - Contact form on own website (without availabilty check)	4.9		4.7		0.15	
Direct - Email	9.9		9.0		0.92	
Direct - real time booking over own website with availabilty check	5.3		6.0		-0.72	
Destination Marketing Organization (DMO) / trade associations	0.5	1.0	0.8	1.3	-0.26	-0.39
National Tourism Organization (NTO)	0.5		0.6		-0.13	
Tour operator / Travel agency	19.3	24.7	19.4	24.3	-0.15	0.46
Hotel chains and cooperations with CRS	0.4		0.6		-0.21	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.4		3.9		0.51	
Event and Congress organizer	0.7		0.4		0.31	
Online Booking Agency (OTA)	22.9	24.5	16.3	18.1	**6.52**	6.40
Globale Distributionssysteme (GDS)	0.7		0.5		0.21	
Social Media Channels	0.9		1.3		-0.33	
other distribution channels	2.0	2.0	1.5	1.5	0.55	0.55

Unweighted samples. Market shares in % of overnights.

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Market shares of distribution channels 2015: Hungary

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Unweighted sample: n=78	Market share		confidence interval (bootstrap)	
Direct - Phone	9.7	47.7	7.9	11.8
Direct - Mail / fax	0.6		0.2	1.0
Direct - Walk-In (persons without reservation)	3.1		2.6	3.9
Direct - Contact form on own website (without availability check)	11.7		8.6	15.0
Direct - Email	17.7		14.0	22.0
Direct - real time booking over own website with availability check	4.8		3.6	6.3
Destination Marketing Organization (DMO) / trade associations	0.1	0.2	0.0	0.4
National Tourism Organization (NTO)	0.1		0.0	0.4
Tour operator / Travel agency	11.6	22.4	8.1	14.4
Hotel chains and cooperations with CRS	0.7		0.4	1.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5.5		3.8	7.3
Event and Congress organizer	4.5		2.8	6.7
Online Booking Agency (OTA)	25.8	26.9	21.5	29.9
Globale Distributionssysteme (GDS)	0.6		0.2	1.0
Social Media Channels	0.6		0.2	1.0
other distribution channels	2.9	2.9	2.4	3.4

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

Hotrec Hospitality Europe

Market shares of distribution channels in Hungary: 2013 vs 2015

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	Market share 2015 (n=78)		Market share 2013 (n=76)		DELTA	
Direct - Phone	9.7	47.7	12.8	56.7	-3.09	-9.03
Direct - Mail / fax	0.6		2.4		-1.82	
Direct - Walk-In (persons without reservation)	3.1		3.5		-0.33	
Direct - Contact form on own website (without availabilty check)	11.7		11.9		-0.21	
Direct - Email	17.7		20.2		-2.49	
Direct - real time booking over own website with availabilty check	4.8		5.9		-1.09	
Destination Marketing Organization (DMO) / trade associations	0.1	0.2	0.8	1.5	-0.66	-1.23
National Tourism Organization (NTO)	0.1		0.7		-0.57	
Tour operator / Travel agency	11.6	22.4	9.3	19.2	2.26	3.12
Hotel chains and cooperations with CRS	0.7		1.0		-0.26	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5.5		4.6		0.98	
Event and Congress organizer	4.5		4.4		0.14	
Online Booking Agency (OTA)	25.8	26.9	19.1	21.4	**6.69**	5.46
Globale Distributionssysteme (GDS)	0.6		1.9		-1.36	
Social Media Channels	0.6		0.4		0.13	
other distribution channels	2.9	2.9	1.2	1.2	1.67	1.67

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Weighted market shares of distribution channels in Hungary: 2013

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	SME hotels 2013 (n=50)		Chain hotels 2013 (n=25)		Weighted average	
weighting	70%		30%			
Direct - Phone	15.0	63.1	8.4	43.6	13.0	57.3
Direct - Mail / fax	3.1		1.0		2.5	
Direct - Walk-In (persons without reservation)	3.7		3.1		3.5	
Direct - Contact form on own website (without availabilty check)	13.7		8.2		12.0	
Direct - Email	22.5		15.4		20.4	
Direct - real time booking over own website with availabilty check	5.1		7.5		5.9	
Destination Marketing Organization (DMO) / trade associations	0.8	1.5	0.7	1.4	0.8	1.5
National Tourism Organization (NTO)	0.7		0.7		0.7	
Tour operator / Travel agency	7.2	14.4	13.7	29.1	9.1	18.8
Hotel chains and cooperations with CRS	0.0		3.0		0.9	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.6		6.6		4.5	
Event and Congress organizer	3.6		5.9		4.3	
Online Booking Agency (OTA)	17.8	19.8	21.8	24.7	19.0	21.3
Globale Distributionssysteme (GDS)	1.5		2.8		1.9	
Social Media Channels	0.6		0.2		0.4	
other distribution channels	1.3	1.3	1.1	1.1	1.2	1.2

Market shares in % of overnights.

Hotrec Hospitality Europe

<u>Weighted</u> market shares of distribution channels in Hungary: 2015

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	SME hotels 2015 (n=50)		Chain hotels 2015 (n=48)		Weighted average	
weighting	70%		30%			
Direct - Phone	12.0	60.3	2.2	18.6	9.04	47.8
Direct - Mail / fax	0.5		0.3		0.43	
Direct - Walk-In (persons without reservation)	3.7		1.4		3.02	
Direct - Contact form on own website (without availabilty check)	16.3		2.0		12.00	
Direct - Email	22.3		9.4		18.46	
Direct - real time booking over own website with availabilty check	5.6		3.2		4.85	
Destination Marketing Organization (DMO) / trade associations	0.2	0.3	0.0	0.0	0.14	0.2
National Tourism Organization (NTO)	0.1		0.0		0.08	
Tour operator / Travel agency	8.7	16.1	31.0	55.1	15.42	27.8
Hotel chains and cooperations with CRS	0.4		3.7		1.43	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.7		7.3		4.04	
Event and Congress organizer	4.3		13.1		6.95	
Online Booking Agency (OTA)	20.5	21.7	23.3	24.2	21.33	22.4
Globale Distributionssysteme (GDS)	0.4		0.8		0.53	
Social Media Channels	0.8		0.0		0.57	
other distribution channels	1.6	1.6	2.0	2.0	1.70	1.7

Market shares in % of overnights.

Hospitality Europe

Weighted market shares of distribution channels in Hungary: 2013 vs. 2015

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Hochschule für Wirtschaft & Tourismus

	Market share 2015 (n=98)		Market share 2013 (n=75)		DELTA	
Direct - Phone	9.0	47.8	13.0	57.3	-3.98	-9.45
Direct - Mail / fax	0.4		2.5		-2.04	
Direct - Walk-In (persons without reservation)	3.0		3.5		-0.47	
Direct - Contact form on own website (without availabilty check)	12.0		12.0		-0.04	
Direct - Email	18.5		20.4		-1.92	
Direct - real time booking over own website with availabilty check	4.9		5.9		-1.00	
Destination Marketing Organization (DMO) / trade associations	0.1	0.2	0.8	1.5	-0.65	-1.24
National Tourism Organization (NTO)	0.1		0.7		-0.59	
Tour operator / Travel agency	15.4	27.8	9.1	18.8	**6.27**	9.02
Hotel chains and cooperations with CRS	1.4		0.9		0.53	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.0		4.5		-0.43	
Event and Congress organizer	6.9		4.3		2.64	
Online Booking Agency (OTA)	21.3	22.4	19.0	21.3	**2.37**	1.17
Globale Distributionssysteme (GDS)	0.5		1.9		-1.34	
Social Media Channels	0.6		0.4		0.14	
other distribution channels	1.7	1.7	1.2	1.2	0.49	0.49

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2015: Ireland

Unweighted sample: n=55	Market share		confidence interval (bootstrap)	
Direct - Phone	20.8	51.1	17.2	25.8
Direct - Mail / fax	1.7		1.2	2.2
Direct - Walk-In (persons without reservation)	4.2		3.2	5.1
Direct - Contact form on own website (without availability check)	3.3		1.8	5.8
Direct - Email	6.6		4.5	8.6
Direct - real time booking over own website with availability check	14.6		11.6	18.0
Destination Marketing Organization (DMO) / trade associations	1.2	1.7	0.7	1.7
National Tourism Organization (NTO)	0.4		0.1	0.7
Tour operator / Travel agency	11.1	16.1	8.7	13.3
Hotel chains and cooperations with CRS	1.0		0.5	1.5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.1		1.6	2.6
Event and Congress organizer	1.9		1.4	2.4
Online Booking Agency (OTA)	25.7	29.1	21.5	29.7
Globale Distributionssysteme (GDS)	2.4		1.9	2.9
Social Media Channels	1.0		0.5	1.5
other distribution channels	2.1	2.1	1.6	2.6

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

Market shares of distribution channels in Ireland: 2013 vs 2015

	Market share 2015 (n=55)		Market share 2013 (n=33)		DELTA	
Direct - Phone	20.8	51.1	26.0	59.4	-5.27	-8.28
Direct - Mail / fax	1.7		1.8		-0.10	
Direct - Walk-In (persons without reservation)	4.2		5.8		-1.64	
Direct - Contact form on own website (without availabilty check)	3.3		3.8		-0.48	
Direct - Email	6.6		9.6		-3.02	
Direct - real time booking over own website with availabilty check	14.6		12.4		2.23	
Destination Marketing Organization (DMO) / trade associations	1.2	1.7	1.1	1.6	0.12	0.02
National Tourism Organization (NTO)	0.4		0.5		-0.10	
Tour operator / Travel agency	11.1	16.1	11.0	18.4	0.12	-2.31
Hotel chains and cooperations with CRS	1.0		1.9		-0.96	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.1		4.2		-2.13	
Event and Congress organizer	1.9		1.2		0.66	
Online Booking Agency (OTA)	25.7	29.1	15.3	18.6	**10.46**	10.56
Globale Distributionssysteme (GDS)	2.4		2.4		0.00	
Social Media Channels	1.0		0.9		0.10	
other distribution channels	2.1	2.1	2.1	2.1	0.01	0.01

Unweighted survey samples. Market shares in % of overnights

Market shares of distribution channels 2015: Norway

Unweighted sample: n=102	Market share		confidence interval (bootstrap)	
Direct - Phone	14.3	38.8	12.8	16.7
Direct - Mail / fax	2.4		2.1	3.7
Direct - Walk-In (persons without reservation)	2.9		2.1	3.7
Direct - Contact form on own website (without availability check)	2.8		2.5	3.6
Direct - Email	14.9		13.3	16.6
Direct - real time booking over own website with availability check	1.6		1.1	2.1
Destination Marketing Organization (DMO) / trade associations	0.2	0.3	0.0	0.4
National Tourism Organization (NTO)	0.1		0.0	0.3
Tour operator / Travel agency	3.8	36.3	3.0	5.1
Hotel chains and cooperations with CRS	17.6		15.4	20.1
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.4		1.0	1.8
Event and Congress organizer	13.4		10.6	16.1
Online Booking Agency (OTA)	12.4	24.6	10.2	15.1
Globale Distributionssysteme (GDS)	12.1		10.4	14.5
Social Media Channels	0.1		0.0	0.2
other distribution channels	0.0	0.0	0.0	0.1

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

Market shares of distribution channels in Norway: 2013 vs 2015

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	Market share 2015 (n=102)		Market share 2013 (n=55)		DELTA	
Direct - Phone	14.3	38.8	24.9	68.3	-10.66	-29.42
Direct - Mail / fax	2.4		5.4		-3.07	
Direct - Walk-In (persons without reservation)	2.9		3.8		-0.88	
Direct - Contact form on own website (without availabilty check)	2.8		2.6		0.20	
Direct - Email	14.9		22.9		-7.98	
Direct - real time booking over own website with availabilty check	1.6		8.6		-7.03	
Destination Marketing Organization (DMO) / trade associations	0.2	0.3	0.5	0.7	-0.29	-0.42
National Tourism Organization (NTO)	0.1		0.2		-0.13	
Tour operator / Travel agency	3.8	36.3	4.2	12.4	-0.35	23.88
Hotel chains and cooperations with CRS	17.6		3.8		13.77	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.4		0.8		0.67	
Event and Congress organizer	13.4		3.7		9.79	
Online Booking Agency (OTA)	12.4	24.6	9.1	18.6	**3.31**	5.96
Globale Distributionssysteme (GDS)	12.1		8.6		3.41	
Social Media Channels	0.1		0.8		-0.76	
other distribution channels	0.0	0.0	0.0	0.0	-0.02	-0.02

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

<u>Weighted</u> market shares of distribution channels 2013: Norway

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Hochschule für Wirtschaft & Tourismus

	SME hotels 2013 (n=16)		Chain hotels 2013 (n=39)		Weighted average	
weighting	37%		63%			
Direct - Phone	24.9	74.1	24.9	65.8	24.9	68.9
Direct - Mail / fax	4.9		5.6		5.4	
Direct - Walk-In (persons without reservation)	8.0		2.1		4.3	
Direct - Contact form on own website (without availabilty check)	5.4		1.4		2.9	
Direct - Email	25.6		21.8		23.2	
Direct - real time booking over own website with availabilty check	5.3		10.0		8.2	
Destination Marketing Organization (DMO) / trade associations	1.1	1.4	0.3	0.5	0.6	0.8
National Tourism Organization (NTO)	0.3		0.2		0.2	
Tour operator / Travel agency	6.1	13.7	3.4	11.9	4.4	12.5
Hotel chains and cooperations with CRS	0.8		5.0		3.5	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.1		1.1		0.7	
Event and Congress organizer	6.7		2.4		4.0	
Online Booking Agency (OTA)	7.3	10.8	9.9	21.8	8.9	17.7
Globale Distributionssysteme (GDS)	1.3		11.7		7.8	
Social Media Channels	2.3		0.2		1.0	
other distribution channels	0.0	0.0	0.1	0.1	0.0	0.0

Market shares in % of overnights.

Hotrec Hospitality Europe

Weighted market shares of distribution channels 2015: Norway

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Hochschule für Wirtschaft & Tourismus

	SME hotels 2015 (n=5)		Chain hotels 2015 (n=180)		Weighted average	
weighting	37%		63%			
Direct - Phone	19.2	59.8	15.9	47.7	17.1	52.2
Direct - Mail / fax	8.8		2.2		4.6	
Direct - Walk-In (persons without reservation)	0.6		3.2		2.3	
Direct - Contact form on own website (without availabilty check)	7.6		2.7		4.5	
Direct - Email	20.8		16.0		17.8	
Direct - real time booking over own website with availabilty check	2.8		7.8		5.9	
Destination Marketing Organization (DMO) / trade associations	0.0	0.0	0.1	0.2	0.1	0.1
National Tourism Organization (NTO)	0.0		0.1		0.0	
Tour operator / Travel agency	2.0	14.0	1.9	26.1	2.0	21.6
Hotel chains and cooperations with CRS	3.8		12.3		9.1	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.0		5.3		3.3	
Event and Congress organizer	8.2		6.7		7.2	
Online Booking Agency (OTA)	19.0	26.2	13.5	26.1	15.5	26.1
Globale Distributionssysteme (GDS)	7.2		12.6		10.6	
Social Media Channels	0.0		0.0		0.0	
other distribution channels	0.0	0.0	0.0	0.0	0.0	0.0

Market shares in % of overnights.

Hotrec Hospitality Europe

<u>Weighted</u> market shares of distribution channels in Norway: 2013 vs 2015

	Market share 2015 (n=185)		Market share 2013 (n=55)		DELTA	
Direct - Phone	17.1	52.2	24.9	68.9	-7.8	-16.7
Direct - Mail / fax	4.6		5.4		-0.8	
Direct - Walk-In (persons without reservation)	2.3		4.3		-2.0	
Direct - Contact form on own website (without availabilty check)	4.5		2.9		1.6	
Direct - Email	17.8		23.2		-5.4	
Direct - real time booking over own website with availabilty check	5.9		8.2		-2.3	
Destination Marketing Organization (DMO) / trade associations	0.1	0.1	0.6	0.8	-0.5	-0.7
National Tourism Organization (NTO)	0.0		0.2		-0.2	
Tour operator / Travel agency	2.0	21.6	4.4	12.5	-2.4	9.1
Hotel chains and cooperations with CRS	9.1		3.5		5.7	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.3		0.7		2.6	
Event and Congress organizer	7.2		4.0		3.2	
Online Booking Agency (OTA)	15.5	26.1	8.9	17.7	6.6	8.4
Globale Distributionssysteme (GDS)	10.6		7.8		2.8	
Social Media Channels	0.0		1.0		-1.0	
other distribution channels	0.0	0.0	0.0	0.0	-0.0	-0.0

Market shares in % of overnights

Market shares of distribution channels 2015: Spain

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Unweighted sample: n=132	Market share		confidence interval (bootstrap)	
Direct - Phone	10.5	37.2	8.1	12.4
Direct - Mail / fax	1.8		1.1	2.5
Direct - Walk-In (persons without reservation)	3.7		2.7	4.6
Direct - Contact form on own website (without availability check)	2.6		1.8	3.4
Direct - Email	8.4		6.9	10.2
Direct - real time booking over own website with availability check	10.2		8.6	11.8
Destination Marketing Organization (DMO) / trade associations	1.1	1.3	0.6	1.6
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	12.7	28.4	10.3	15.7
Hotel chains and cooperations with CRS	2.6		1.9	3.2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	9.0		6.9	11.1
Event and Congress organizer	4.0		2.7	5.8
Online Booking Agency (OTA)	27.6	31.5	24.5	31.2
Globale Distributionssysteme (GDS)	3.6		2.7	4.6
Social Media Channels	0.3		0.0	0.6
other distribution channels	1.7	1.7	1.1	2.3

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

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Market shares of distribution channels in Spain: 2013 vs 2015

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Hochschule für Wirtschaft & Tourismus

	Market share 2015 (n=132)		Market share 2013 (n=153)		DELTA	
Direct - Phone	10.5	37.2	16.7	43.6	-6.25	-6.45
Direct - Mail / fax	1.8		2.7		-0.90	
Direct - Walk-In (persons without reservation)	3.7		6.1		-2.45	
Direct - Contact form on own website (without availabilty check)	2.6		3.3		-0.69	
Direct - Email	8.4		6.5		1.94	
Direct - real time booking over own website with availabilty check	10.2		8.3		1.90	
Destination Marketing Organization (DMO) / trade associations	1.1	1.3	0.3	0.4	0.87	0.86
National Tourism Organization (NTO)	0.1		0.1		-0.01	
Tour operator / Travel agency	12.7	28.4	16.0	30.2	-3.25	-1.81
Hotel chains and cooperations with CRS	2.6		3.6		-0.99	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	9.0		8.6		0.36	
Event and Congress organizer	4.0		2.0		2.07	
Online Booking Agency (OTA)	27.6	31.5	21.7	24.0	**5.93**	7.48
Globale Distributionssysteme (GDS)	3.6		1.9		1.74	
Social Media Channels	0.3		0.5		-0.19	
other distribution channels	1.7	1.7	1.8	1.8	-0.11	-0.11

Unweighted samples. Market shares in % of overnights.

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Market shares of distribution channels 2015: Sweden

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Unweighted sample: n=74	Market share		confidence interval (bootstrap)	
Direct - Phone	15.5	39.5	13.8	17.8
Direct - Mail / fax	1.5		1.2	1.8
Direct - Walk-In (persons without reservation)	3.4		3.1	3.7
Direct - Contact form on own website (without availability check)	3.1		2.8	3.4
Direct - Email	16.1		14.5	18.0
Direct - real time booking over own website with availability check	0.1		0.0	0.2
Destination Marketing Organization (DMO) / trade associations	0.0	0.1	0.0	0.2
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	4.4	39.6	2.6	8.0
Hotel chains and cooperations with CRS	24.2		21.9	27.5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.9		0.5	1.3
Event and Congress organizer	10.1		8.3	12.2
Online Booking Agency (OTA)	8.8	20.9	7.8	10.8
Globale Distributionssysteme (GDS)	12.1		10.9	14.5
Social Media Channels	0.0		0.0	0.2
other distribution channels	0.0	0.0	0.0	0.2

Confidence intervals are stated at the 95% level. Market shares in % of overnights. **Sample biased as only 3 SME hotels present.**

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Market shares of distribution channels in Sweden: 2013 vs 2015

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	Market share 2015 (n=74)		Market share 2013 (n=17)		DELTA	
Direct - Phone	15.5	39.5	34.1	74.7	-18.61	-35.20
Direct - Mail / fax	1.5		1.2		0.33	
Direct - Walk-In (persons without reservation)	3.4		4.5		-1.17	
Direct - Contact form on own website (without availabilty check)	3.1		6.9		-3.89	
Direct - Email	16.1		22.2		-6.17	
Direct - real time booking over own website with availabilty check	0.1		5.8		-5.69	
Destination Marketing Organization (DMO) / trade associations	0.0	0.1	2.2	3.5	-2.18	-3.48
National Tourism Organization (NTO)	0.1		1.4		-1.30	
Tour operator / Travel agency	4.4	39.6	4.1	4.4	0.31	35.18
Hotel chains and cooperations with CRS	24.2		0.1		24.10	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.9		0.0		0.85	
Event and Congress organizer	10.1		0.2		9.91	
Online Booking Agency (OTA)	8.8	20.9	11.8	13.6	-3.02	7.26
Globale Distributionssysteme (GDS)	12.1		1.5		10.58	
Social Media Channels	0.0		0.3		-0.29	
other distribution channels	0.0	0.0	3.8	3.8	-3.76	-3.76

Observations for 2013 not sufficient -> results on evolution not reliable! Unweighted sample. Market shares in % of overnights.

Hotrec Hospitality Europe

Weighted market shares of distribution channels 2015: Sweden

	SME hotels 2015 (n=3)		Chain hotels 2015 (n=154)		Weighted average	
weighting	56%		44%			
Direct - Phone	21.7	39.0	14.0	50.1	18.3	43.9
Direct - Mail / fax	0.3		1.4		0.8	
Direct - Walk-In (persons without reservation)	3.7		2.9		3.3	
Direct - Contact form on own website (without availabilty check)	3.3		2.7		3.0	
Direct - Email	8.3		14.6		11.1	
Direct - real time booking over own website with availabilty check	1.7		14.5		7.3	
Destination Marketing Organization (DMO) / trade associations	0.0	1.3	0.0	0.0	0.0	0.7
National Tourism Organization (NTO)	1.3		0.0		0.7	
Tour operator / Travel agency	33.7	33.7	1.5	28.5	19.5	31.4
Hotel chains and cooperations with CRS	0.0		18.5		8.1	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.0		3.5		1.5	
Event and Congress organizer	0.0		5.0		2.2	
Online Booking Agency (OTA)	26.0	26.0	9.1	21.3	18.6	23.9
Globale Distributionssysteme (GDS)	0.0		12.2		5.4	
Social Media Channels	0.0		0.0		0.0	
other distribution channels	0.0	0.0	0.0	0.0	0.0	0.0

Observations for SME hotels not sufficient -> results not reliable! Market shares in % of overnights.

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

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	SME hotels 2013 (n=14)		Chain hotels 2013 (n=3)		Weighted average	
weighting	56%		44%			
Direct - Phone	34.2	76.2	33.3	67.7	33.8	72.5
Direct - Mail / fax	0.8		3.0		1.8	
Direct - Walk-In (persons without reservation)	5.1		2.0		3.7	
Direct - Contact form on own website (without availabilty check)	8.4		0.3		4.8	
Direct - Email	21.9		23.7		22.7	
Direct - real time booking over own website with availabilty check	5.9		5.3		5.6	
Destination Marketing Organization (DMO) / trade associations	1.9	3.1	3.3	5.7	2.5	4.2
National Tourism Organization (NTO)	1.1		2.3		1.7	
Tour operator / Travel agency	3.1	3.4	9.0	9.3	5.7	6.0
Hotel chains and cooperations with CRS	0.1				0.1	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.0		0.0		0.0	
Event and Congress organizer	0.1		0.3		0.2	
Online Booking Agency (OTA)	12.2	14.4	10.0	10.0	11.2	12.4
Globale Distributionssysteme (GDS)	1.8		0.0		1.0	
Social Media Channels	0.4		0.0		0.2	
other distribution channels	3.0	3.0	7.3	7.3	4.9	4.9

Observations for chain hotels not sufficient -> results not reliable! Market shares in % of overnights.

Hotrec Hospitality Europe

Weighted market shares of distribution channels in Sweden: 2013 vs 2015

	Market share 2015 (n=157)		Market share 2013 (n=17)		DELTA	
Direct - Phone	18.3	43.9	33.8	72.5	-15.5	-28.6
Direct - Mail / fax	0.8		1.8		-1.0	
Direct - Walk-In (persons without reservation)	3.3		3.7		-0.4	
Direct - Contact form on own website (without availabilty check)	3.0		4.8		-1.8	
Direct - Email	11.1		22.7		-11.6	
Direct - real time booking over own website with availabilty check	7.3		5.6		1.7	
Destination Marketing Organization (DMO) / trade associations	0.0	0.7	2.5	4.2	-2.5	-3.5
National Tourism Organization (NTO)	0.7		1.7		-0.9	
Tour operator / Travel agency	19.5	31.4	5.7	6.0	13.9	25.4
Hotel chains and cooperations with CRS	8.1		0.1		8.1	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.5		0.0		1.5	
Event and Congress organizer	2.2		0.2		2.0	
Online Booking Agency (OTA)	18.6	23.9	11.2	12.4	7.3	11.5
Globale Distributionssysteme (GDS)	5.4		1.0		4.4	
Social Media Channels	0.0		0.2		-0.2	
other distribution channels	0.0	0.0	4.9	4.9	-4.9	-4.9

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

Market shares of distribution channels in 2015 according to Visita survey in Sweden

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	Total (unweighted)	SME hotels (n=60)		chain hotels (n=140)		Total (weighted)	
Booking.com	11.3%	17.1%		8.8%		13.5%	
Expedia	5.7%	8.1%	29.0%	4.7%	14.6%	6.6%	22.7%
other OTA	1.9%	3.8%		1.0%		2.6%	
GDS	9.8%	5.6%		11.6%		8.2%	
Own website	14.1%	11.5%	59.0%	15.2%	62.2%	13.1%	60.4%
Othe booking channels (direct, etc.)	47.1%	47.5%		46.9%		47.3%	

Relative market shares of OTAs	
Booking.com	59.4%
Expedia	29.2%
other OTA	11.5%

- SME hotels: OTA share in hotrec data 26% compared to 29% in Visita survey.

- Chain hotels: OTA share in hotrec data 9.1% compared to 14.6% in Visita survey.

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Market shares of distribution channels 2015: Switzerland

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Unweighted sample: n=226	Market share		confidence interval (bootstrap)	
Direct - Phone	19.9	60.7	18.2	21.4
Direct - Mail / fax	2.0		1.5	2.7
Direct - Walk-In (persons without reservation)	4.7		4.0	5.4
Direct - Contact form on own website (without availability check)	5.0		3.9	6.2
Direct - Email	21.6		20.0	23.5
Direct - real time booking over own website with availability check	7.5		6.4	8.6
Destination Marketing Organization (DMO) / trade associations	1.4	2.1	1.1	1.7
National Tourism Organization (NTO)	0.7		0.3	1.0
Tour operator / Travel agency	4.6	10.3	3.7	5.9
Hotel chains and cooperations with CRS	1.1		0.8	1.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.3		1.9	2.7
Event and Congress organizer	2.3		1.9	2.7
Online Booking Agency (OTA)	20.6	24.3	18.7	23.2
Globale Distributionssysteme (GDS)	3.4		2.6	4.2
Social Media Channels	0.4		0.1	0.7
other distribution channels	2.5	2.5	1.9	3.1

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

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Market shares of distribution channels in Switzerland: 2013 vs 2015

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	Market share 2015		Market share 2013		DELTA	
Direct - Phone	19.9	60.7	20.6	63.7	-0.66	-3.00
Direct - Mail / fax	2.0		2.2		-0.21	
Direct - Walk-In (persons without reservation)	4.7		5.9		-1.15	
Direct - Contact form on own website (without availabilty check)	5.0		6.4		-1.36	
Direct - Email	21.6		21.2		0.39	
Direct - real time booking over own website with availabilty check	7.5		7.5		-0.01	
Destination Marketing Organization (DMO) / trade associations	1.4	2.1	1.4	2.5	0.04	-0.31
National Tourism Organization (NTO)	0.7		1.1		-0.35	
Tour operator / Travel agency	4.6	10.3	4.6	10.0	0.08	0.29
Hotel chains and cooperations with CRS	1.1		1.3		-0.17	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.3		2.7		-0.39	
Event and Congress organizer	2.3		1.5		0.77	
Online Booking Agency (OTA)	20.6	24.3	19.4	22.5	**1.21**	1.82
Globale Distributionssysteme (GDS)	3.4		2.8		0.54	
Social Media Channels	0.4		0.3		0.07	
other distribution channels	2.5	2.5	1.3	1.3	1.21	1.21

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Trends in Booking Channels in Swiss Hotels 2002-2015

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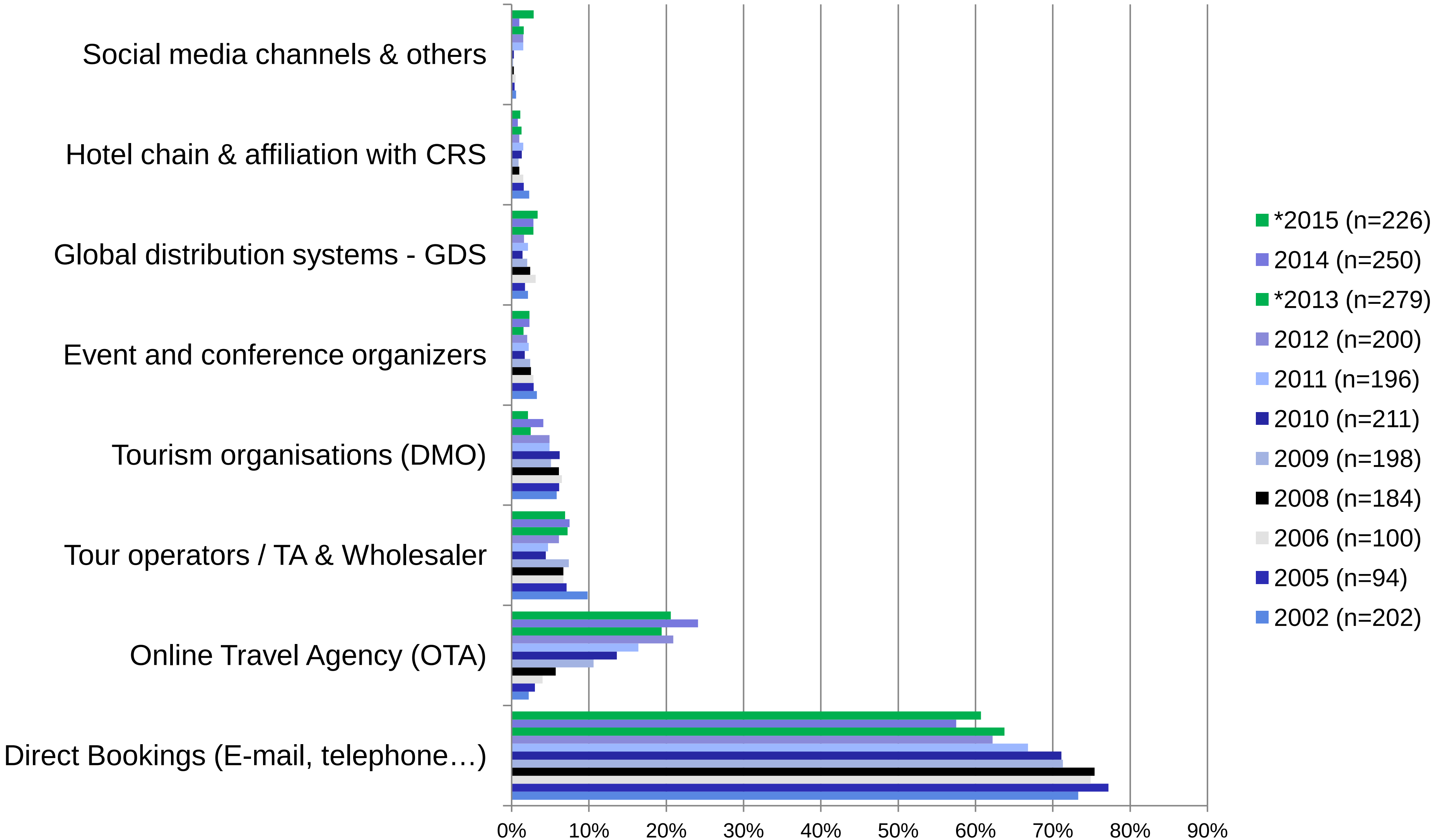
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



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

Trends in Booking Channels in Swiss Hotels 2006-2015

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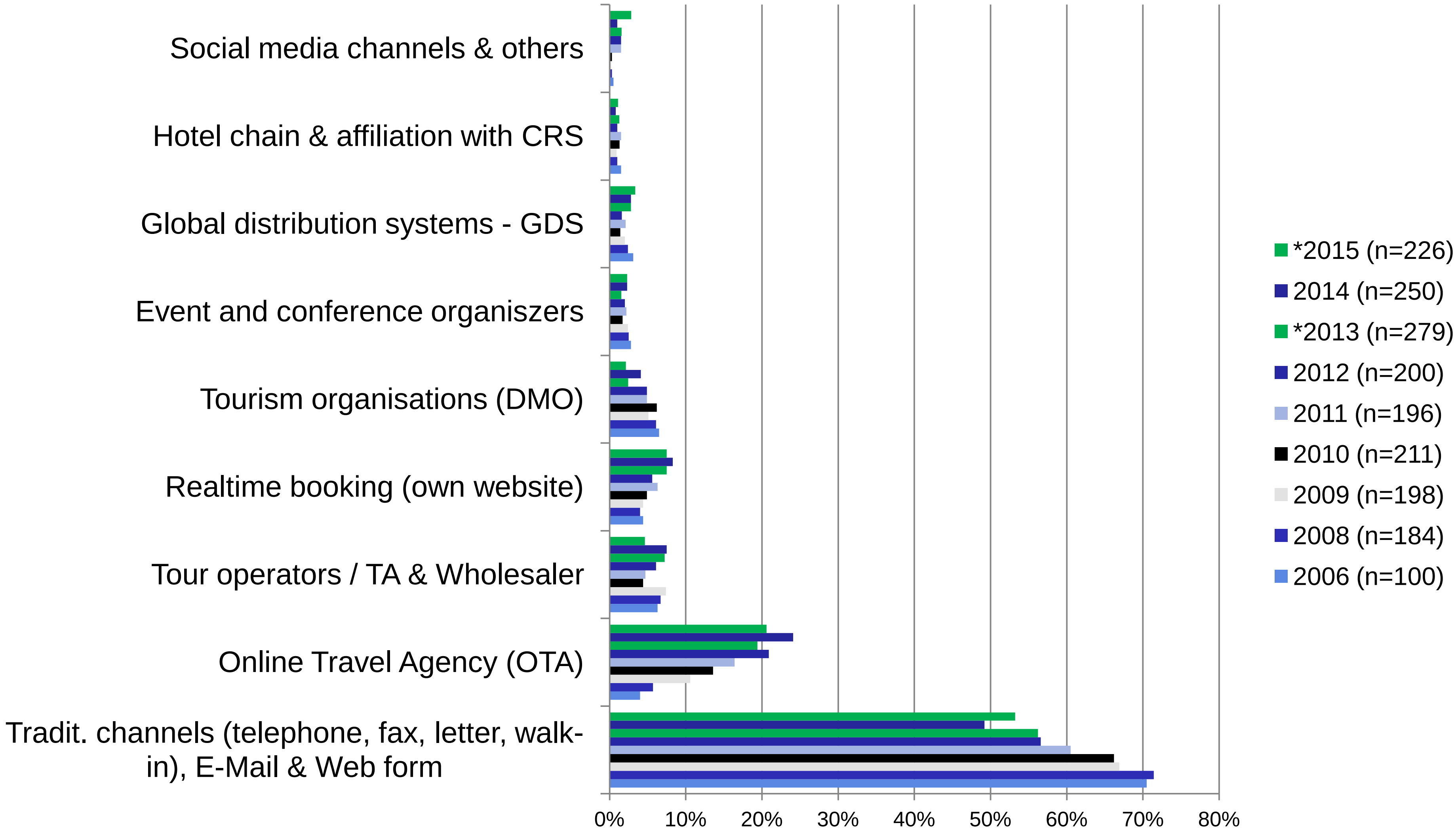
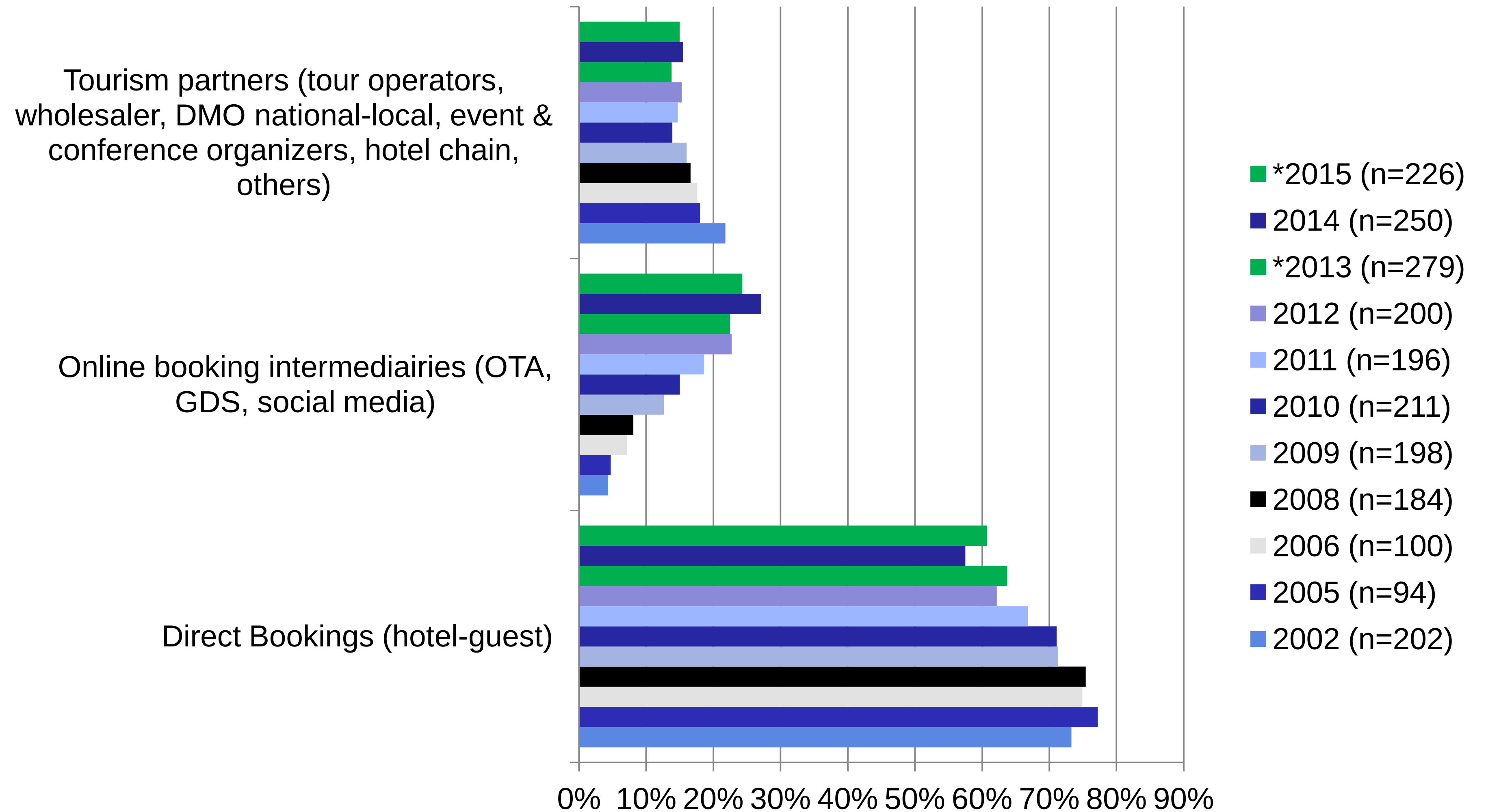
Hochschule für Wirtschaft & Tourismus



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

Distribution Trends in the Swiss Hotel Sector 2002-2015

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



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

Distribution Trends in the Swiss Hotel Sector 2002-2015

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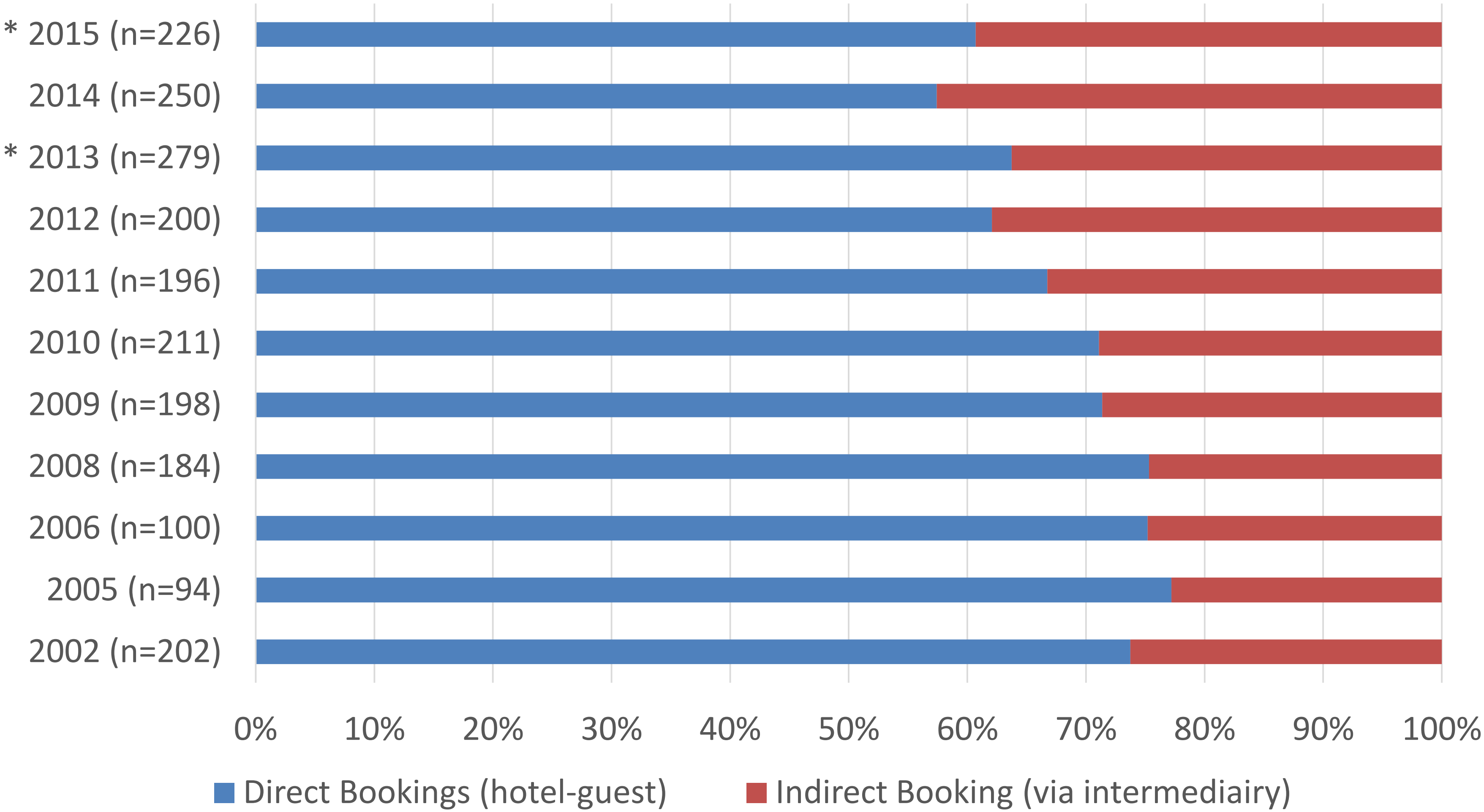

Attention: Market shares in % of ***bookings*** for 2002-2012 & 2014 and in % of ***overnights*** in 2013 and 2015 !

Market shares of distribution channels 2015: Turkey

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=56	Market share		confidence interval (bootstrap)	
Direct - Phone	11.0	43.0	8.4	13.9
Direct - Mail / fax	2.7		1.2	4.2
Direct - Walk-In (persons without reservation)	6.1		4.5	7.8
Direct - Contact form on own website (without availability check)	2.6		1.4	4.8
Direct - Email	16.4		12.0	20.5
Direct - real time booking over own website with availability check	4.2		2.7	5.7
Destination Marketing Organization (DMO) / trade associations	1.0	2.5	0.5	1.5
National Tourism Organization (NTO)	1.5		0.9	2.1
Tour operator / Travel agency	20.8	32.8	15.5	27.4
Hotel chains and cooperations with CRS	0.5		0.1	0.9
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5.6		3.7	7.4
Event and Congress organizer	6.0		4.0	8.0
Online Booking Agency (OTA)	17.3	20.6	14.2	20.6
Globale Distributionssysteme (GDS)	2.2		1.6	2.9
Social Media Channels	1.1		0.6	1.6
other distribution channels	1.1	1.1	0.6	1.6

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

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Market shares of distribution channels in Turkey: 2013 vs 2015

	Market share 2015 (n=56)		Market share 2013 (n=52)		DELTA	
Direct - Phone	11.0	43.0	11.1	41.7	-0.15	1.27
Direct - Mail / fax	2.7		6.6		-3.93	
Direct - Walk-In (persons without reservation)	6.1		5.6		0.42	
Direct - Contact form on own website (without availabilty check)	2.6		3.1		-0.48	
Direct - Email	16.4		9.9		6.50	
Direct - real time booking over own website with availabilty check	4.2		5.3		-1.09	
Destination Marketing Organization (DMO) / trade associations	1.0	2.5	1.5	2.4	-0.48	0.10
National Tourism Organization (NTO)	1.5		0.9		0.58	
Tour operator / Travel agency	20.8	32.8	26.1	37.2	-5.31	-4.40
Hotel chains and cooperations with CRS	0.5		1.5		-1.04	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5.6		5.3		0.26	
Event and Congress organizer	6.0		4.3		1.69	
Online Booking Agency (OTA)	17.3	20.6	12.1	16.9	**5.17**	3.73
Globale Distributionssysteme (GDS)	2.2		4.1		-1.86	
Social Media Channels	1.1		0.7		0.42	
other distribution channels	1.1	1.1	1.8	1.8	-0.69	-0.69

Unweighted samples. Market shares in % of overnights.

Distribution channels for countries with 20 to 50 observations

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- France (n=22)
- Poland (n=33)
- Slovakia (n=23)

Results have to be taken with caution due to low number of observations

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Market shares of distribution channels 2015: France

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Unweighted sample: n=22	Market share		confidence interval (bootstrap)	
Direct - Phone	18.0	52.0	11.3	25.8
Direct - Mail / fax	1.9		1.0	2.8
Direct - Walk-In (persons without reservation)	3.5		1.6	6.6
Direct - Contact form on own website (without availability check)	2.2		1.0	3.4
Direct - Email	14.9		10.5	18.8
Direct - real time booking over own website with availability check	11.5		7.8	15.1
Destination Marketing Organization (DMO) / trade associations	0.0	0.1	0.0	0.3
National Tourism Organization (NTO)	0.1		0.0	0.3
Tour operator / Travel agency	3.7	12.7	1.7	6.2
Hotel chains and cooperations with CRS	0.3		0.1	0.5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.3		2.2	6.3
Event and Congress organizer	4.5		2.3	6.5
Online Booking Agency (OTA)	28.1	33.1	20.6	39.6
Globale Distributionssysteme (GDS)	4.7		2.5	7.1
Social Media Channels	0.2		0.0	0.4
other distribution channels	2.1	2.1	1.1	3.2

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Market shares of distribution channels 2015: Poland

Unweighted sample: n=33	Market share		confidence interval (bootstrap)	
Direct - Phone	16.4	55.4	13.6	20.0
Direct - Mail / fax	0.3		0.0	0.6
Direct - Walk-In (persons without reservation)	6.2		4.6	8.3
Direct - Contact form on own website (without availability check)	1.6		1.0	2.1
Direct - Email	20.2		15.3	25.6
Direct - real time booking over own website with availability check	10.6		5.8	15.6
Destination Marketing Organization (DMO) / trade associations	0.0	0.1	0.0	0.3
National Tourism Organization (NTO)	0.1		0.0	0.3
Tour operator / Travel agency	6.4	17.9	2.7	10.7
Hotel chains and cooperations with CRS	3.2		1.6	4.8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.7		2.4	7.0
Event and Congress organizer	3.6		1.8	5.4
Online Booking Agency (OTA)	22.7	26.5	17.6	28.1
Globale Distributionssysteme (GDS)	3.5		1.7	5.3
Social Media Channels	0.4		0.1	0.7
other distribution channels	0.1	0.1	0.0	0.2

Market shares of distribution channels 2015: Slovakia

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Unweighted sample: n=23	Market share		confidence interval (bootstrap)	
Direct - Phone	16.5	69.0	9.3	24.5
Direct - Mail / fax	2.3		1.1	3.5
Direct - Walk-In (persons without reservation)	5.2		3.4	7.2
Direct - Contact form on own website (without availability check)	9.8		4.6	16.3
Direct - Email	29.6		22.1	38.1
Direct - real time booking over own website with availability check	5.6		3.5	7.4
Destination Marketing Organization (DMO) / trade associations	0.9	1.1	0.3	1.5
National Tourism Organization (NTO)	0.2		0.0	0.4
Tour operator / Travel agency	7.0	15.4	4.1	10.4
Hotel chains and cooperations with CRS	1.3		0.5	1.8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.1		0.4	1.7
Event and Congress organizer	6.0		3.1	8.9
Online Booking Agency (OTA)	11.0	13.0	6.1	16.0
Globale Distributionssysteme (GDS)	1.5		0.6	2.4
Social Media Channels	0.5		0.1	0.9
other distribution channels	1.6	1.6	0.8	2.4

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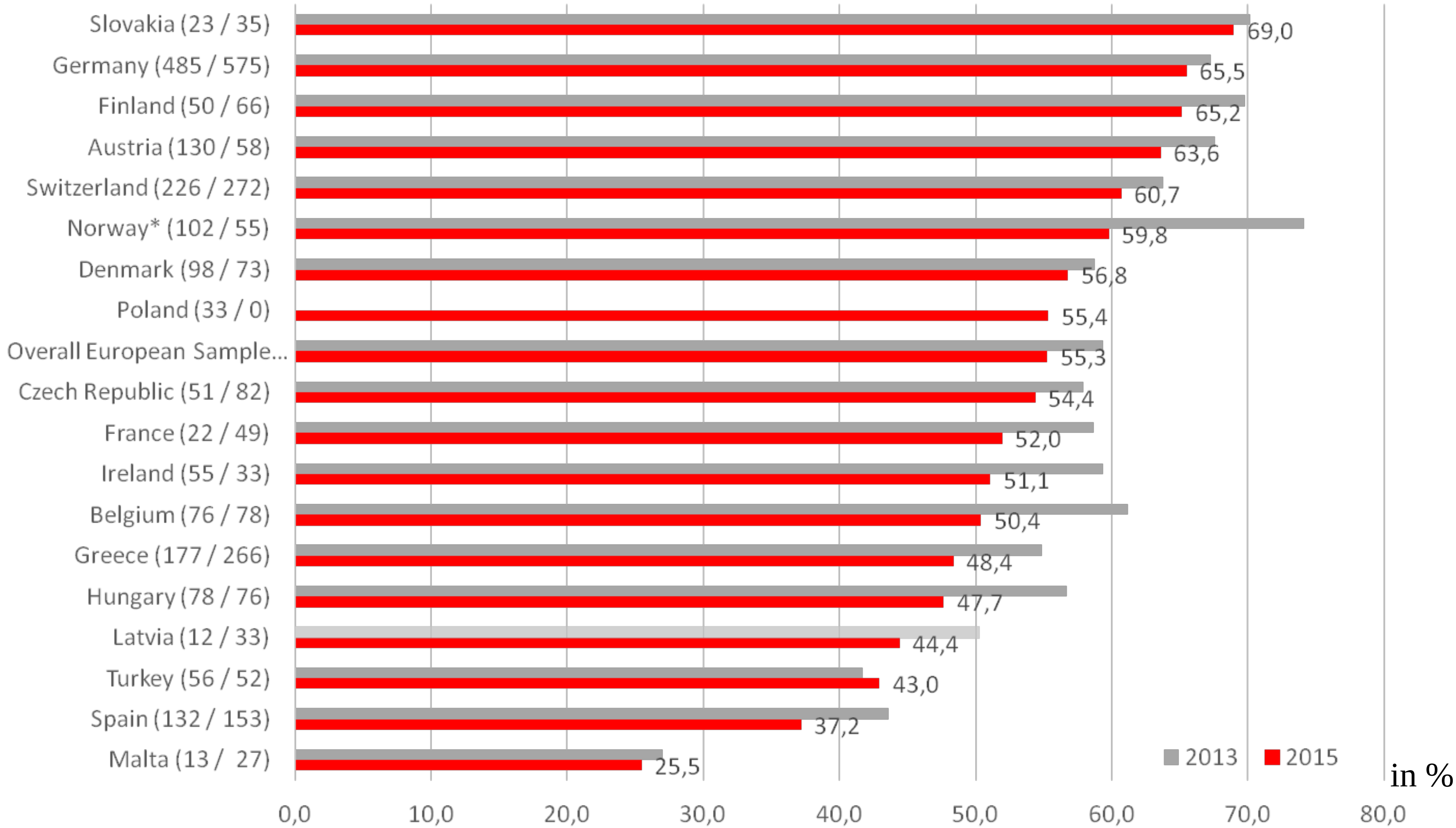
Analysis of direct booking market shares

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

Direct booking shares for selected countries (2013 vs 2015)

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



Less than 30 observations -> weak validity of mean value. Number of observations in brackets for 2015 and 2013 respectively. * Weighted values for Norway

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Direct booking shares by segment (overall sample Europe)

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	54.3%	66.9%	67.4%	54.1%	**55.3%**		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	52.1%	59.4%	57.9%	52.2%	45.8%	57.9%	**55.4%**

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	62.9%	60.9%	53.0	41.6%	**55.2%**		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	58.1%	52.6%	52.9%	70.9%	**55.3%**		

Location of hotel	City with more than 250'000 inhabitants	City between 50'000 and 250'000 inhabitants	City between 10'000 and 50'000 inhabitants	small city (less than 10'000 inhabitants)	***Total***		
	41.5%	51.4%	57.9%	63.3%	**55.0%**		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	59.9%	39.9%	55.3%	**55.1%**			

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

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Direct booking shares by segment (independent SME hotels, Europe)

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Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***
	60.1%	66.7%	72.1%	55.4%	**60.1%**

Star category	1*	2*	3*	4*	5*	other	***Total***
	50.4%	59.2%	60.2%	56.8%	44.8%	58.1%	**58.5%**

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***
	63.6%	62.5%	56.6%	43.1%	**59.9%**

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***
	65.2%	56.2%	62.1%	74.1%	**60.1%**

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***
	43.5%	59.1%	61.2%	64.8%	**59.8%**

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

Direct booking shares by segment (chain hotels, Europe)

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	*Total*		
	44.2%	67.9%		44.5%	**45.0%**		

Star category	1*	2*	3*	4*	5*	other category	*Total*
	61.5%	64.1%	48.4%	44.4%	46.0%	56.4%	**46.9%**

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	*Total*		
	53.9%	52.3%	47.1	41.0%	**45.0%**		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	*Total*		
	47.1%	43.0%	40.3%	53.2%	44.9%		

Location of hotel	City with more than 250'000 inhabitants	City between 50'000 and 250'000 inhabitants	City between 10'000 and 50'000 inhabitants	small city (less than 10'000 inhabitants)	*Total*		
	39.8%	42.3%	48.2%	55.4%	**44.9%**		

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

Hospitality Europe

Analysis of OTA market shares

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

OTA market shares 2015 vs 2013 for selected countries

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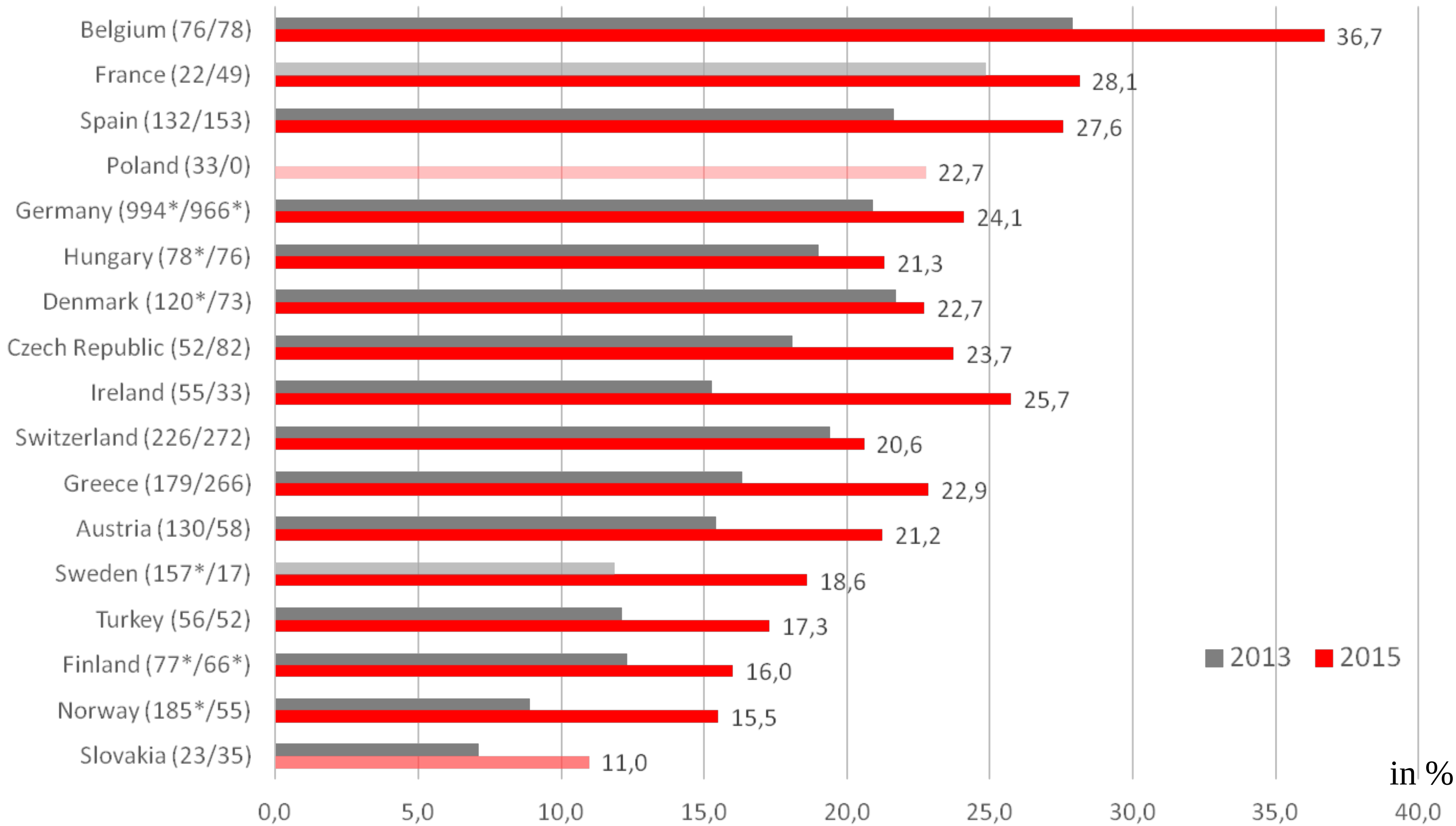

Less than 30 observations -> weak validity of mean value.
Number of observations in brackets for 2015 and 2013 respectively. * = weighted OTA market shares

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OTA market shares by segment (overall sample Europe)

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Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	23.1%	17.8%	15.7%	20.0%	***22.3%***		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	33.5%	25.7%	24.5%	22.0%	17.0%	22.7%	***22.3%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	27.5%	23.1%	20.7%	17.6%	***22.3%***		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	21.2%	23.6%	16.7%	15.0%	***22.3%***		

Location of hotel	City with more than 250'000 inhabitants	City between 50'000 and 250'000 inhabitants	City between 10'000 and 50'000 inhabitants	small city (less than 10'000 inhabitants)	***Total***		
	29.2%	21.6%	20.6%	19.5%	***22.3%***		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	23.5%	18.3%	23.1%	***22.3%***			

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

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OTA market shares by segment (independent SME hotels, Europe)

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Seasonality	open all year	two seasons	one season	one season	***Total***		
	24.5%	19.2%	9.7%	21.0%	***23.4%***		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	37.0%	26.4%	24.0%	20.7%	18.3%	23.9%	***23.4%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	27.3%	22.6%	20.9%	19.2%	23.4%		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	22.6%	24.8%	12.9%	14.5%	***23.4%***		

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***		
	35.3%	24.3%	22.3%	20.1%	***23.4%***		

Values highlighted in blue are significantly higher than sample average. Cells marked in red are significantly lower. N=1513

OTA market shares by segment (hotels of chains and cooperations, Europe)

Seasonality	open all year	two seasons	one season	one season	***Total***		
	20.6%	10.1%		12.4%	***19.9%***		
Star category	1*	2*	3*	4*	5*	other	***Total***
	13.8%	14.4%	26.6%	24.3%	16.7%	14.8%	***19.9%***
Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	29.8%	25.9%	20.3%	17.0%	***19.9%***		
Main customer segments of hotels	Business	Vacation /	MICE	Other segment	***Total***		
	19.1%	20.4%	21.8%	18.0%	***19.9%***		
Location of hotel	City with more	City between	City between	small city (less	***Total***		
	24.2%	18.4%	15.4%	16.2%	***19.9%***		

Values highlighted in blue are significantly higher than sample average. Cells marked in red are significantly lower. N=697

OTAs in Europe

Booking.com

Expedia

HRS

Unweighted relative market shares of OTAs in Europe

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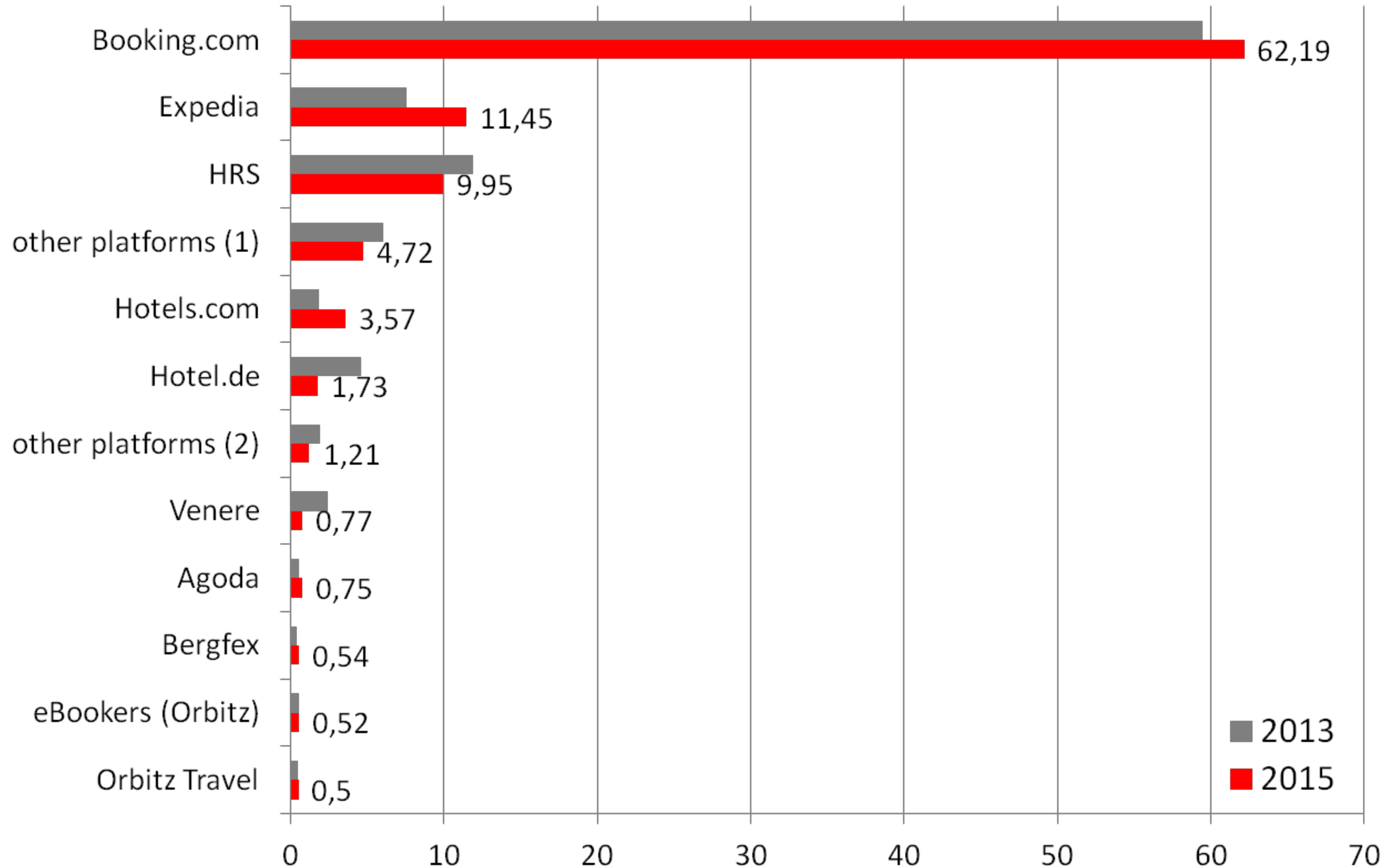

Hotrec Hospitality Europe

Relative market shares of top 3 OTAs in selected countries (I)

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	Austria 2013	Austria 2015	Belgium 2013	Belgium 2015	Czech Republic 2013	Czech Republic 2015	Denmark 2013	Denmark 2015	Finland 2013	Finland 2015	Germany 2013*	Germany 2015*	overall sample 2013	overall sample 2015
observations (n)	*49*	*112*	*56*	*64*	*55*	*40*	*50*	*68*	*42*	*39*	*597*	*395*	*1736*	*1870*
Agoda	0.2	0.5	0.0	0.1	0.3	0.3	0.0	0.5	0.0	0.1	0.2	0.2	0.5	0.8
Booking.com	66.8	65.0	70.2	68.6	65.0	60.6	58.1	59.4	64.6	63.7	41.6	47.0	59.5	62.2
Priceline	**67.0**	**65.5**	**70.2**	**68.6**	**65.2**	**60.9**	**58.2**	**59.9**	**64.6**	**63.8**	**41.8**	**47.2**	**60.0**	**62.9**
HRS	7.9	8.3	3.6	5.0	8.6	10.8	4.7	3.4	1.9	0.9	31.1	28.7	11.9	10.0
Hotel.de	4.0	1.2	1.1	0.5	5.0	2.6	1.7	0.8	0.6	0.4	10.4	5.9	4.6	1.7
Tiscover	3.4	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.2	0.2
HRS Group (total)	**15.3**	**12.8**	**4.7**	**5.5**	**13.5**	**13.3**	**6.4**	**4.3**	**2.5**	**1.3**	**41.6**	**34.6**	**16.6**	**11.9**
Expedia	5.5	8.1	6.6	12.6	8.3	8.6	8.9	19.4	2.5	6.8	5.8	11.1	7.5	11.5
Venere	2.1	0.7	1.6	0.8	3.5	0.5	1.6	1.1	0.5	0.1	1.1	0.2	2.4	0.8
Hotels.com	0.3	1.1	0.6	0.6	1.5	1.6	9.1	6.5	2.2	7.4	1.0	0.9	1.8	3.6
eBookers	0.0	0.8	0.4	0.6	0.1	0.2	0.1	0.2	0.5	5.0	0.2	0.1	1.1	0.5
Orbitz Travel	0.0	0.5	0.6	0.3	0.5	0.3	0.1	0.8	0.5	0.5	0.4	0.1	1.7	0.5
Expedia Group (total)	**7.9**	**11.2**	**9.9**	**14.9**	**13.7**	**11.2**	**19.9**	**27.9**	**6.2**	**19.8**	**8.5**	**12.4**	**14.5**	**16.8**
Total of top 3	***90.2***	***89.5***	***84.7***	***89.0***	***92.5***	***85.4***	***84.4***	***92.1***	***73.3***	***84.9***	***92.0***	***94.2***	***91.1***	***91.7***

Based on sample data from countries with more than 40 observations from survey (plus data from hotel chains in Germany -> weighted average).*

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Relative market shares of top 3 OTAs in selected countries (II)

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	Greece 2013	Greece 2015	Hungary 2013	Hungary 2015	Norway 2013	Norway 2015	Spain 2013	Spain 2015	Switzerland 2013	Switzerland 2015	overall sample 2013	overall sample 2015
observations (n)	*163*	*141*	*68*	*73*	*41*	*101*	*127*	*118*	*247*	*202*	*1736*	*1870*
Agoda	0.5	0.9	2.1	1.7	0.2	0.1	1.4	2.6	0.4	0.9	0.5	0.8
Booking.com	73.3	73.6	55.7	56.0	72.7	63.1	66.2	54.9	69.7	70.3	59.5	62.2
Priceline	**73.8**	**74.5**	**57.8**	**57.7**	**72.9**	**63.2**	**67.6**	**57.5**	**70.1**	**71.3**	**60.0**	**62.9**
HRS	0.5	0.8	6.1	5.4	2.3	2.8	2.0	2.6	6.7	7.0	11.9	10.0
Hotel.de	0.7	0.4	2.5	0.5	1.4	0.1	1.5	0.9	3.0	1.5	4.6	1.7
Tiscover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.2	0.2
HRS Group (total)	**1.2**	**1.2**	**8.6**	**6.0**	**3.7**	**2.8**	**3.5**	**3.5**	**9.8**	**8.6**	**16.6**	**11.9**
Expedia	8.8	15.0	8.3	13.4	8.5	11.2	10.9	20.0	6.3	10.8	7.5	11.5
Venere	3.7	0.9	1.6	0.3	0.4	0.0	3.9	1.0	2.6	0.9	2.4	0.8
Hotels.com	2.8	2.9	1.1	1.6	5.7	21.0	1.1	1.5	1.0	1.5	1.8	3.6
eBookers	0.2	0.1	0.5	0.7	0.1	0.2	0.6	1.0	1.3	0.5	1.1	0.5
Orbitz Travel	0.1	0.1	0.4	0.7	0.7	1.1	1.3	1.3	0.3	0.5	1.7	0.5
Expedia Group (total)	**15.6**	**19.0**	**11.9**	**16.8**	**15.3**	**33.6**	**17.9**	**24.8**	**11.5**	**14.2**	**14.5**	**16.8**
Total of top 3	***90.6***	***94.7***	***78.2***	***80.5***	***91.9***	***99.6***	***89.0***	***85.8***	***91.4***	***94.1***	***91.1***	***91.7***

Based on sample data from countries with more than 40 observations from survey

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Relative market shares of top 3 OTAs in selected countries in 2013

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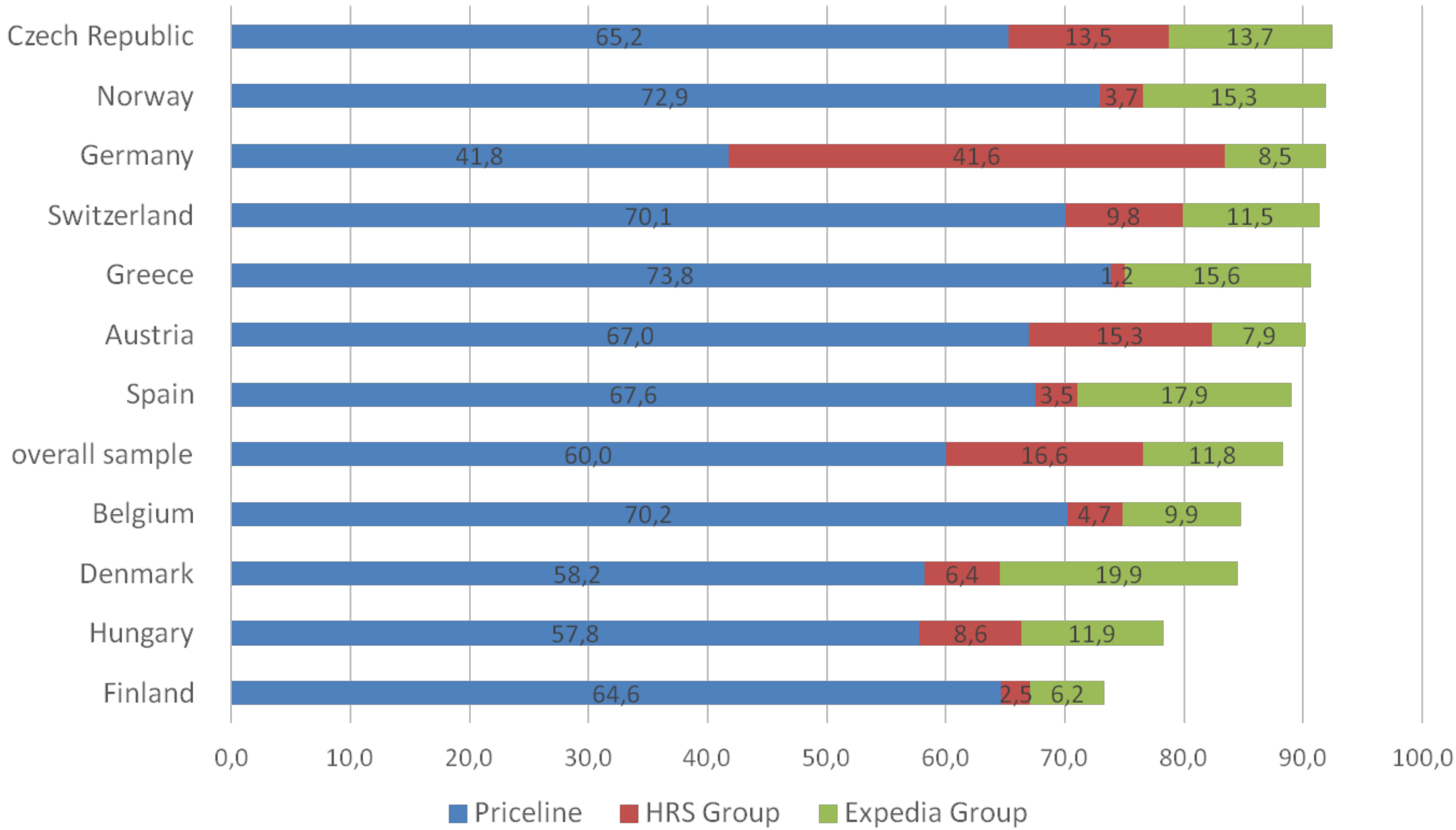

Based on sample data from countries with more than 40 observations from survey (plus data from hotel chains in Germany -> weighted average).

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Relative market shares of top 3 OTAs in selected countries in 2015

Haute Ecole de Gestion & Tourisme
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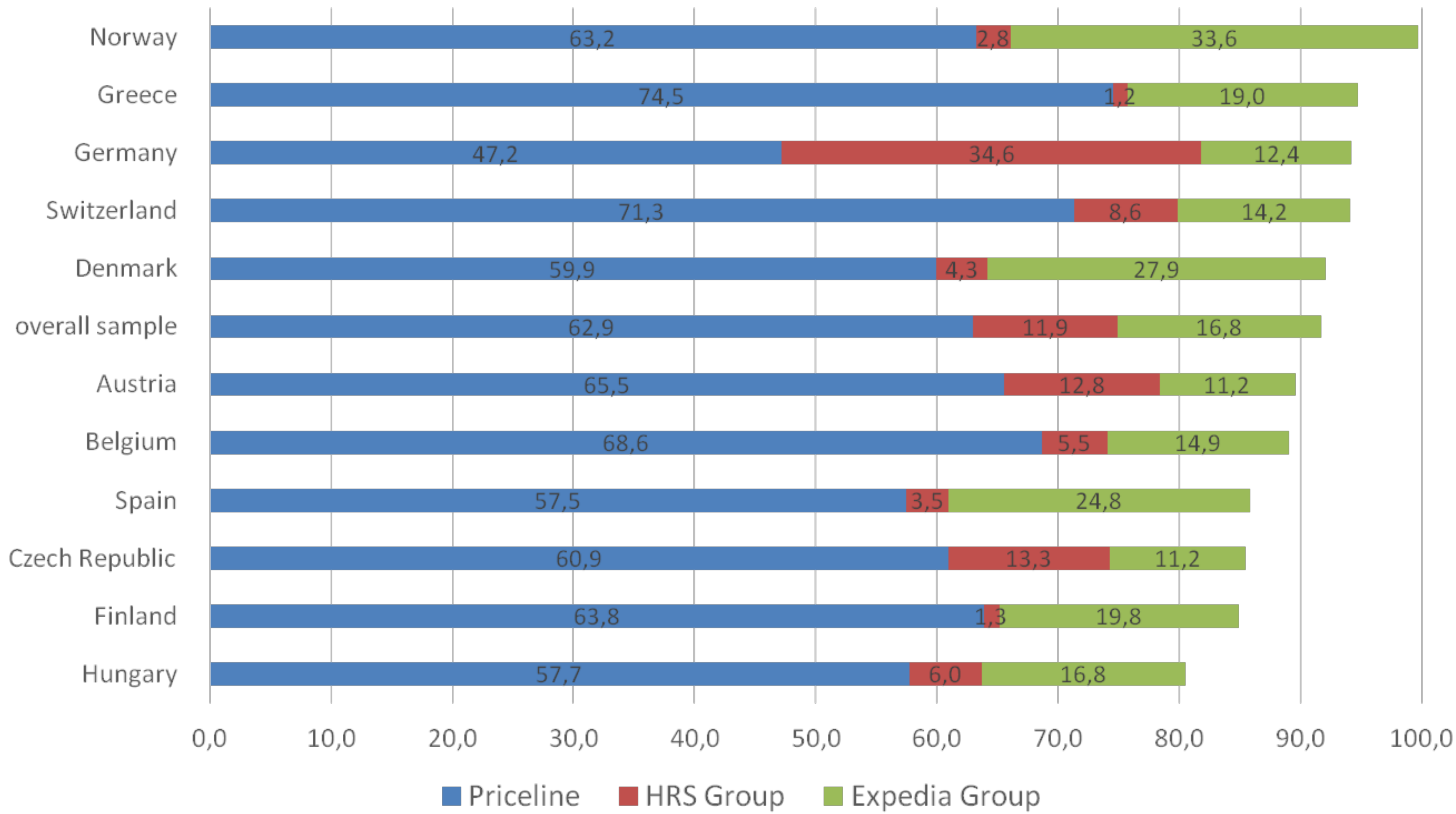

Based on sample data from countries with more than 40 observations from survey (plus data from hotel chains in Germany -> weighted average).

Hospitality Europe

Relative market shares of Priceline by hotel segment

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Hochschule für Wirtschaft & Tourismus

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	60.7%	72.8%	66.0%	73.1%	***62.9%***		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	76.8%	72.9%	62.9%	58.4%	62.4%	64.6%	***62.9%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	69.9%	63.5%	59.2%	60.0%	***62.9%***		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	56.3%	68.0%	53.0%	65.2%	***62.9%***		

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***		
	62.7%	61.1%	60.8%	69.5%	***62.9%***		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	65.0%	58.9%	59.3%	***62.9%***			

OTA Commission Rates Reductions

%

Have you received a reduction of OTA Commission Rates since summer 2015?

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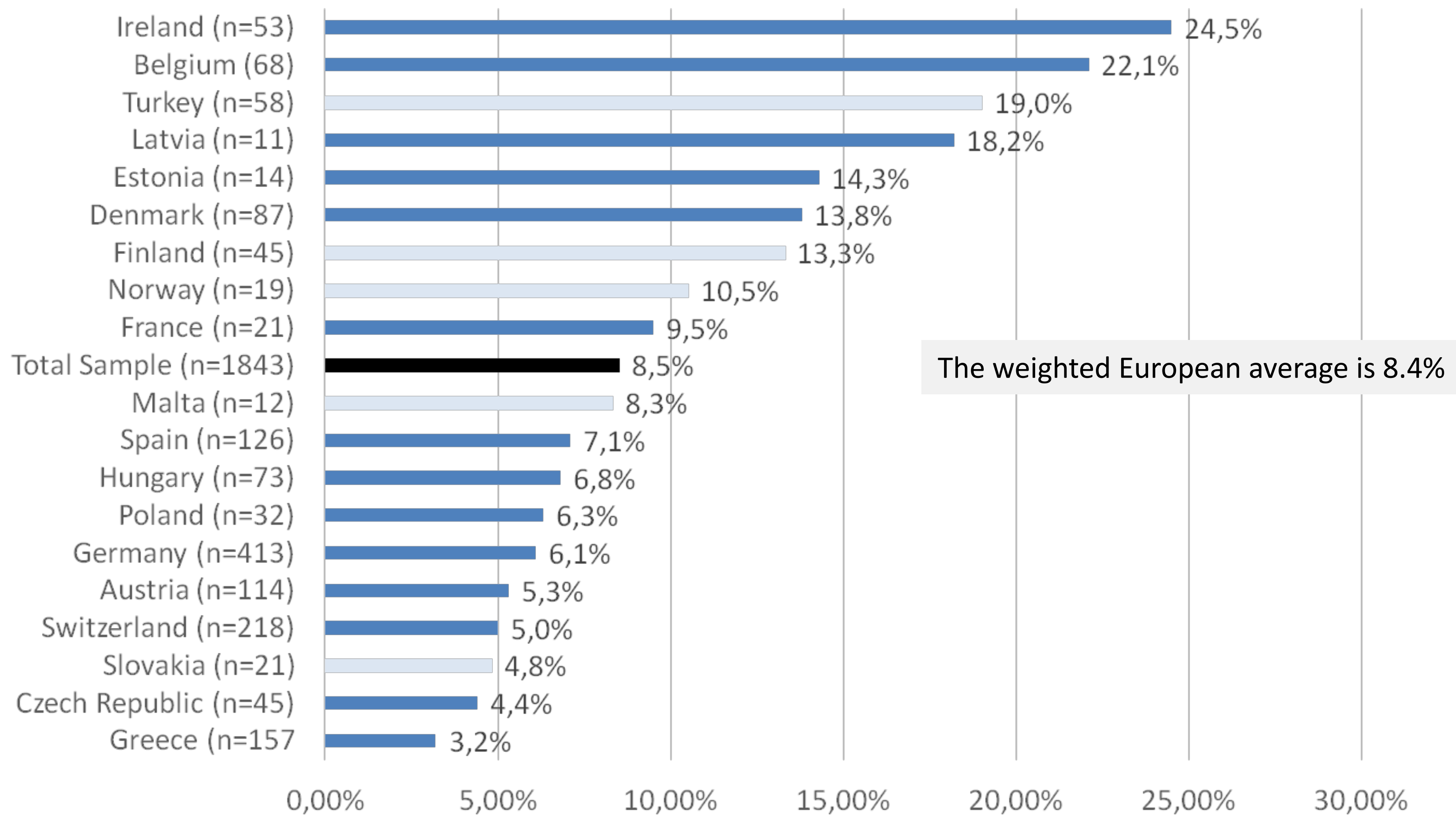

Based on unweighted (raw) sample data from countries with at least 10 observations.

Have you received a reduction of OTA Commission Rates since summer 2015?

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Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	9.7%	3.3%	0.0%	4.9%	***8.50%***		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	3.1%	3.0%	6.3%	10.1%	28.2%	8.8%	***8.50%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	4.0%	4.9%	9.3%	18.2%	***8.50%***		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	10.1%	7.1%	15.5%	7.1%	***8.50%***		

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***		
	16.1%	9.5%	4.1%		***8.50%***		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	5.1%	18.0%	16.1%	***8.50%***			

Based on unweighted (raw) sample data. Elements over (under) represented are coloured.

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Distribution channel management

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

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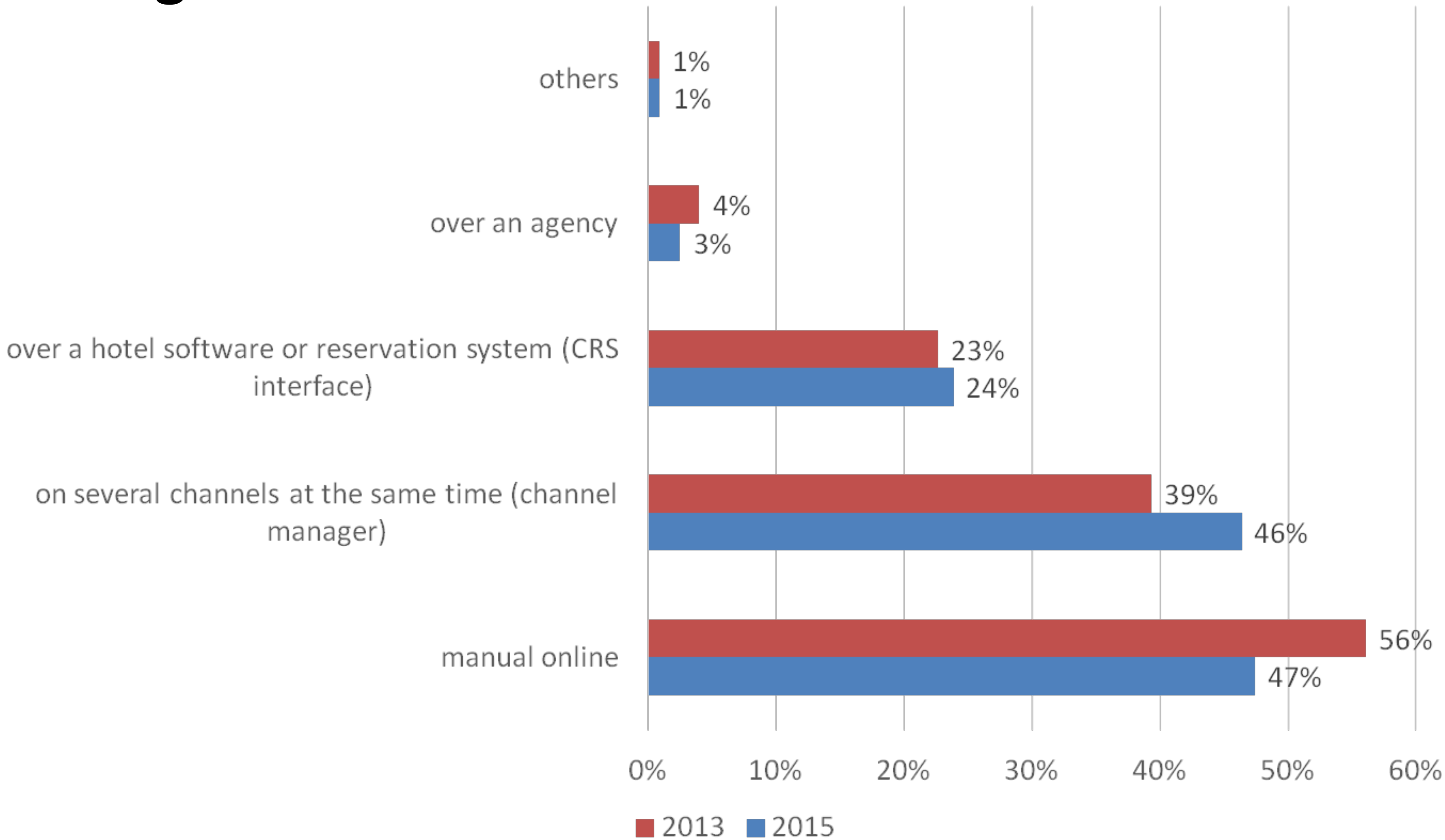

Based on unweighted (raw) sample data.

Hotrec Hospitality Europe

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 47%.
- As expected, chain hotels use channel managers (65% of properties) and PMS-CRS systems (50%) significantly more often than independent hotels (41% resp. 16%) which still manage channels in a manual manner most of the time (56%).
- Hotels in bigger cities (>100'000 inhabitants) make a more intense use of channels managers (70% of hotels) and PMS-CRS systems (nearly 35%) than hotels in smaller cities (<50'000 inhabitants) where manual management is popular (57%).

Channel management: summary of overall results

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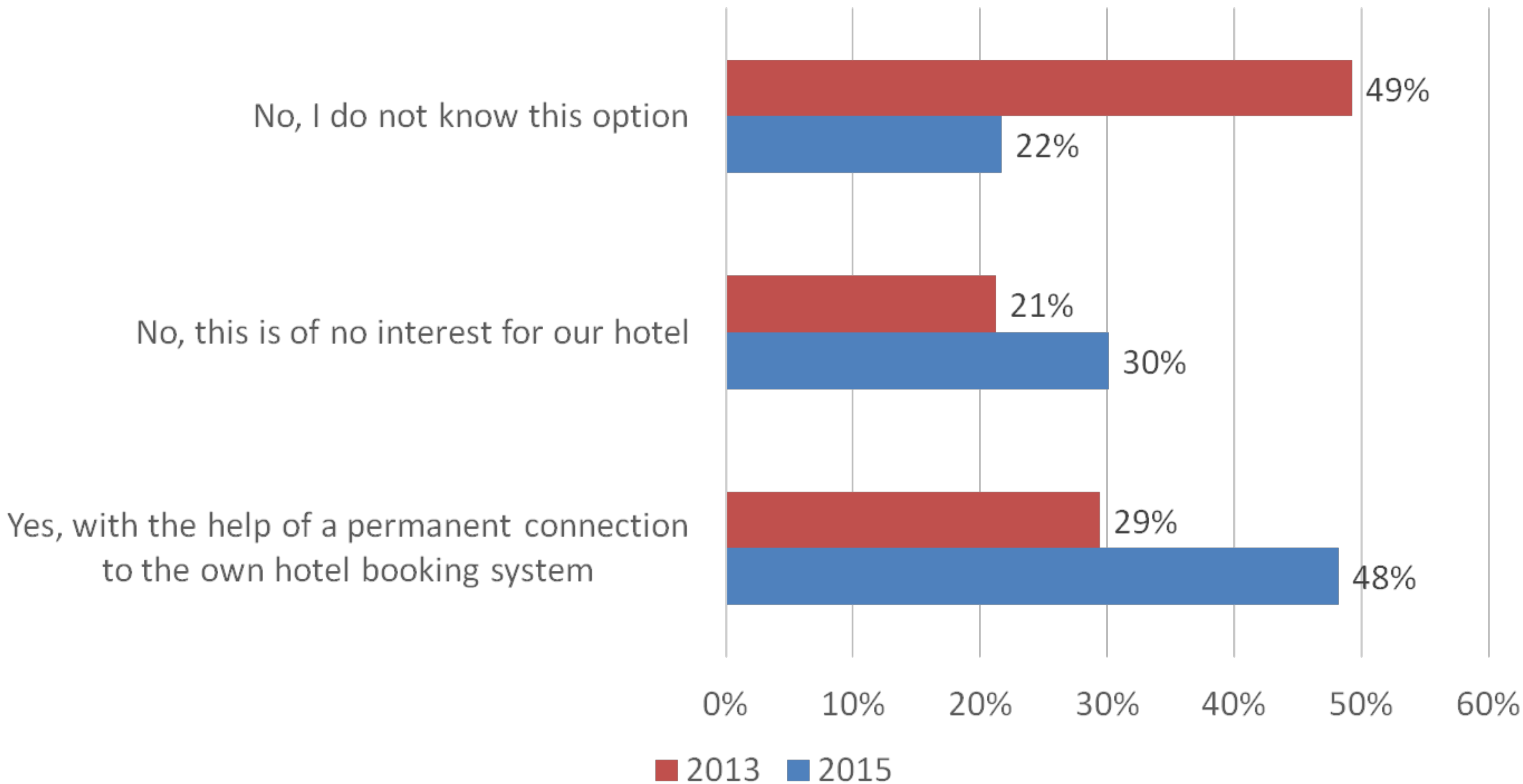
- In 4* and 5* hotels, the use of channel managers (59% and 56%, respectively) and CRS hotel software (27% and 56%, respectively) is clearly higher than in other types of hotels. In 1 and 2 star hotels nearly two third of hotels still manage channels manually.
- Size matters: more than 55% of hotels with more than 50 rooms use channel managers whereas in hotels with less than 20 rooms, two third of properties manage channels in a manual way.

Hotrec Hospitality Europe

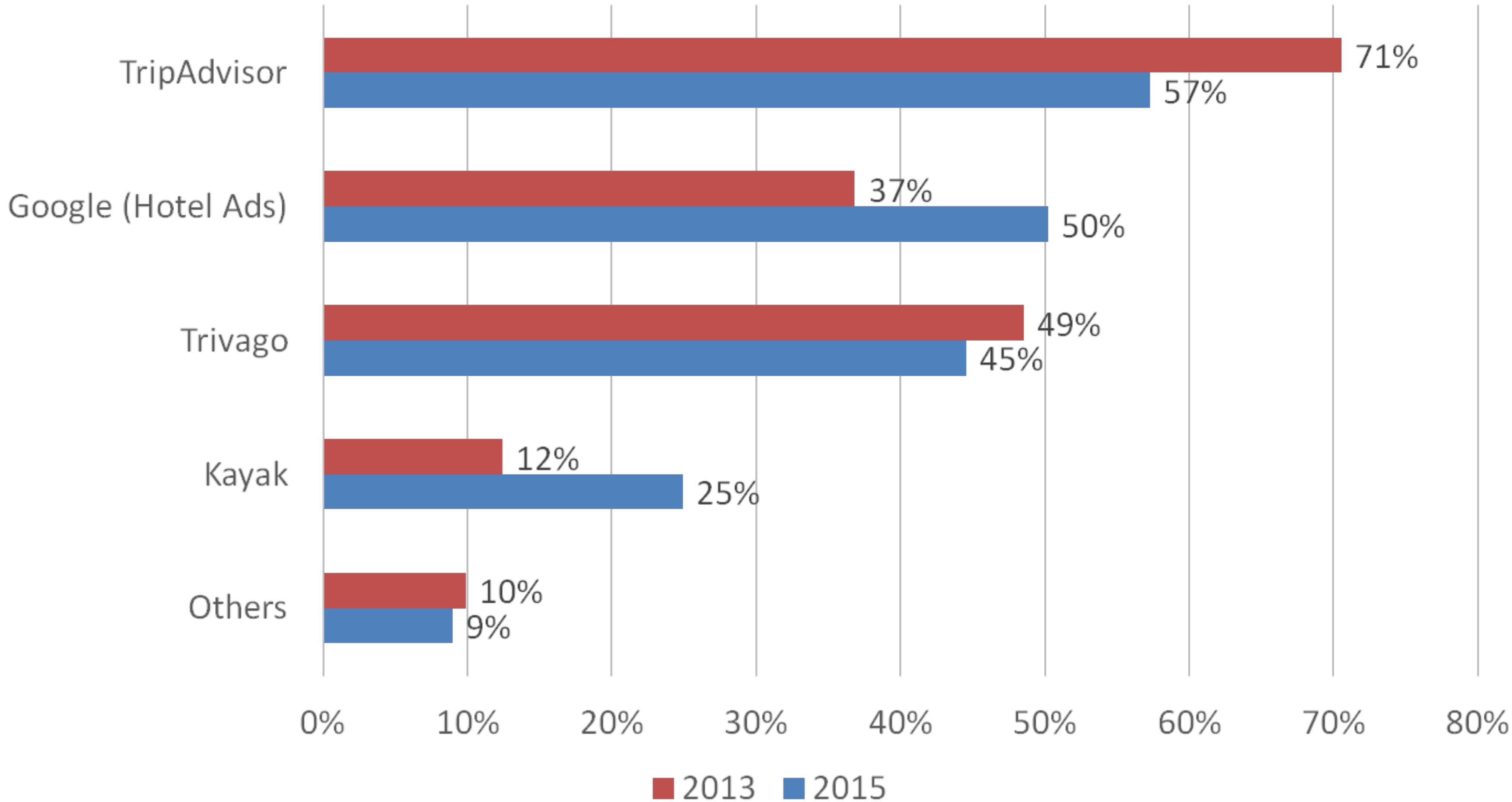
Use of meta-search engines

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 (I)

- Compared to 2014 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 48% (compared to 29% in 2014).
- 80% of chain hotels and 51% of hotels from a hotel cooperation have a permanent connection to meta-search engines compared with 37% for the independent hotels.
- Use of meta-search engines is more widespread (68%) in hotels in big cities (>250’000 inhabitants) than in small cities of less than 10’000 inhabitants (37%).

Meta-search engines: summary of overall results (II)

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- As expected bigger hotels (>100 rooms) use meta-search interface more intensively (72%) than small (<20 rooms) hotels (32%).
- 4 star hotel (54%) and 5 star (65%) lead the use of direct meat-search junction clearly compared to all other hotel categories.

Meta-search engine market: summary of overall results

- The three most popular meta-search engines are TripAdvisor (57%), Google (50%) and Expedia's Trivago (45%), followed by Priceline's Kayak (25%).
- Chain hotels use more frequently Google Hotel Ads (72%) and Kayak (57%) than independent hotels (40% and 9%, respectively).
- Kayak is very popular in hotels focusing on the business segment (31%) and TripAdvisor in leisure hotels (62%).
- Kayak and Google are more frequently used in big hotels (66% and 50% respectively in hotels >100 rooms) whereas TripAdvisor and Trivago are more popular in smaller hotels (69% and 60% respectively for hotels with 20-50 rooms).

Contact

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Bachelor of Science HES-SO in Tourism in German, French and English
http://tourism.hevs.ch

Annex 1: The Questionnaire (1)

European Hotel Distribution Study 2016

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 "**submit**"-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
Email: roland.schegg@hevs.ch
Institute of Tourism (ITO)
School of Management & Tourism
University of Applied Sciences of Western Switzerland Valais (HES-SO Valais)
Sierre, Switzerland

School of Management & Tourism

Annex 1: The Questionnaire (2)

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

European Hotel Distribution Study 2016

Country

○ Austria	○ Belgium	○ Bulgaria	○ Croatia	○ Cyprus	○ Czech Republic
○ Denmark	○ Estonia	○ Finland	○ France	○ Germany	○ Greece
○ Hungary	○ Ireland	○ Italy	○ Latvia	○ Lithuania	○ Luxembourg
○ Malta	○ Netherlands	○ Norway	○ Poland	○ Portugal	○ Slovakia
○ Slovenia	○ Spain	○ Sweden	○ Switzerland	○ Turkey	○ United Kingdom

Hospitality Europe

Annex 1: The Questionnaire (3)

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A. Distribution channels of hotel

What was the percentage of overnight stays in 2015 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) / trade associations	
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)	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	
Event and Congress organizer	
Social Media Channels	
other distribution channels	

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Annex 1: The Questionnaire (4)

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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:

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Annex 1: The Questionnaire (5)

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B. Online Travel Agencies (OTA / IDS)

If your hotel is bookable over Online Travel Agencies (OTA), please indicate the relative distribution (in %) of these overnight stays for the year 2015.

Please indicate values as whole numbers. The sum should amount to 100%.

Agoda	
Bergfex	
Booking.com	
BookNorway	
eBookers (Orbitz)	
Destinia	
eDreams	
Expedia	
Hotel.ch	
Hotel.de	
Hoteliers.com	
Hotels.nl	
Hotels.com	
HRS	

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Annex 1: The Questionnaire (6)

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HRS	
Hotelzon	
Lastminute.com (Travelocity)	
Latebooking.com	
Logictravel	
Olotels.com	
Orbitz Travel	
Rumbo	
Venere	
Tiscover	
Voyage-Privé	
Voyage-SNCF.fr (excl. Rail)	
Unister (ab-in-den-urlaub.de, hotelreservierung.de, reise.de, etc.)	
other platforms (1)	
other platforms (2)	

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

Annex 1: The Questionnaire (7)

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European Hotel Distribution Study 2016

If "other platforms (1)", which ones: ☐

If "other platforms (2)", which ones: ☐

Have you received reductions of OTA commission since summer 2015?

◯ Yes ◯ No

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)
- ☐ over an agency
- ☐ over a hotel software or reservation system (CRS interface)
- ☐ manual online
- ☐ others

If "others", which ones?

☐

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Annex 1: The Questionnaire (8)

Are your rates and availabilities accessible with a direct junction / interface with a meta-search engine (e.g. Kayak, 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 ☐ Kayak ☐ TripAdvisor ☐ Trivago ☐ Others

If "Others", which?

Annex 1: The Questionnaire (9)

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European Hotel Distribution Study 2016

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)

[ ]

How many overnight stays did you register in 2015?

[ ]

If you cannot give precise data, give an estimation in the following question below.

Annex 1: The Questionnaire (10)

How many overnight stays did you register in 2015? (estimation)

- ○ <2 000
- ○ 2 000-5 000
- ○ 5 000-10 000
- ○ 10 000-15 000
- ○ 20 000-25 000
- ○ 25 000-30 000
- ○ 30 000-40 000
- ○ 40 000-50 000
- ○ >50 000

Most important customer segment

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

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

- ○ seaside
- ○ alpine/mountain region
- ○ rural region
- ○ other location

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.

A BIG THANK YOU FOR YOUR VALUABLE COLLABORATION!

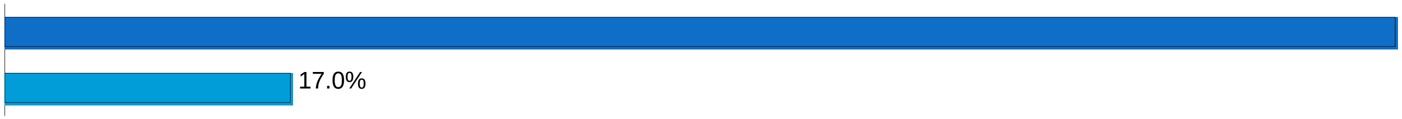
Submit

Annex 2: Sample characteristics (1)

Is your hotel classified (hotel stars)?

Response rate: **95.6%**

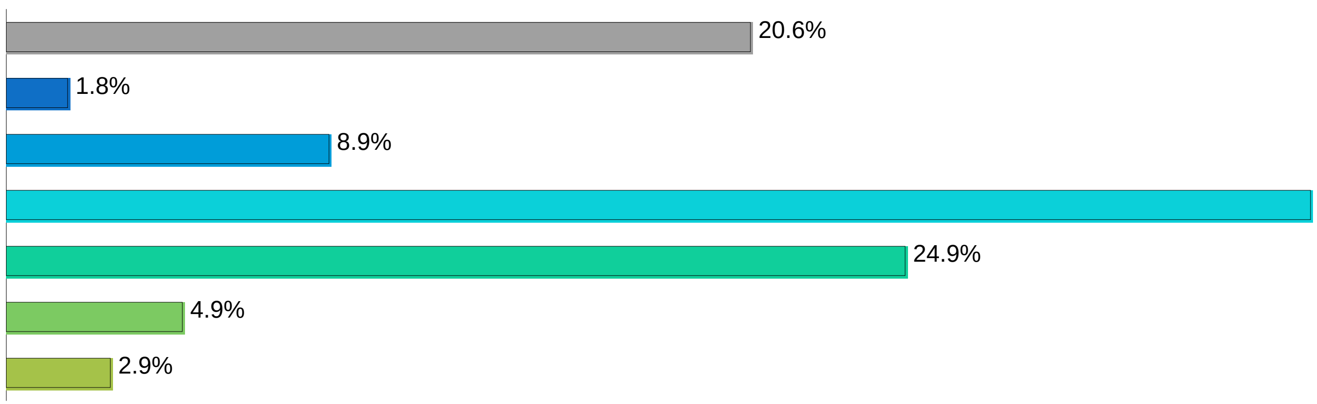
	Nbr
Yes	**1752**
No	**360**
Total	**2112**



Star classification

Response rate: **79.4%**

	Nbr
Non response	**455**
1*	**39**
2*	**197**
3*	**796**
4*	**550**
5*	**109**
other category	**64**
Total	**2210**



Annex 2: Sample characteristics (2)

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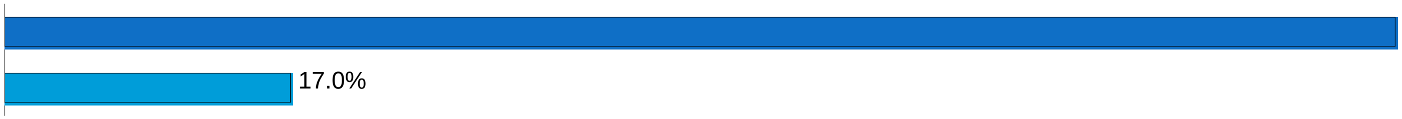
Is your hotel classified (hotel stars)?

Response rate: **95.6%**

	Nbr
Yes	**1752**
No	**360**
Total	**2112**



Star classification

Response rate: **79.4%**

	Nbr
1*	**39**
2*	**197**
3*	**796**
4*	**550**
5*	**109**
other category	**64**
Total	**1755**

Annex 2: Sample characteristics (3)

Seasonal opening hours

Response rate: **99.0%**

	Nbr
Non response	**23**
open all year round	**1746**
two seasons business	**164**
one season business (winter)	**10**
one season business (summer)	**267**
Total	**2210**

Annex 2: Sample characteristics (4)

Size of hotel (number of hotel rooms)

Response rate: **98.8%**

Mean = **76.48** Median = **42.00** Std deviation = **95.44**

Min = **2** Max = **1226**

Number of rooms_cat

Response rate: **98.8%**

	Nbr
Non response	**27**
Less than 20	**515**
From 20 to 50	**708**
From 50 to 100	**440**
100 and over	**520**
Total	**2210**

Annex 2: Sample characteristics (5)

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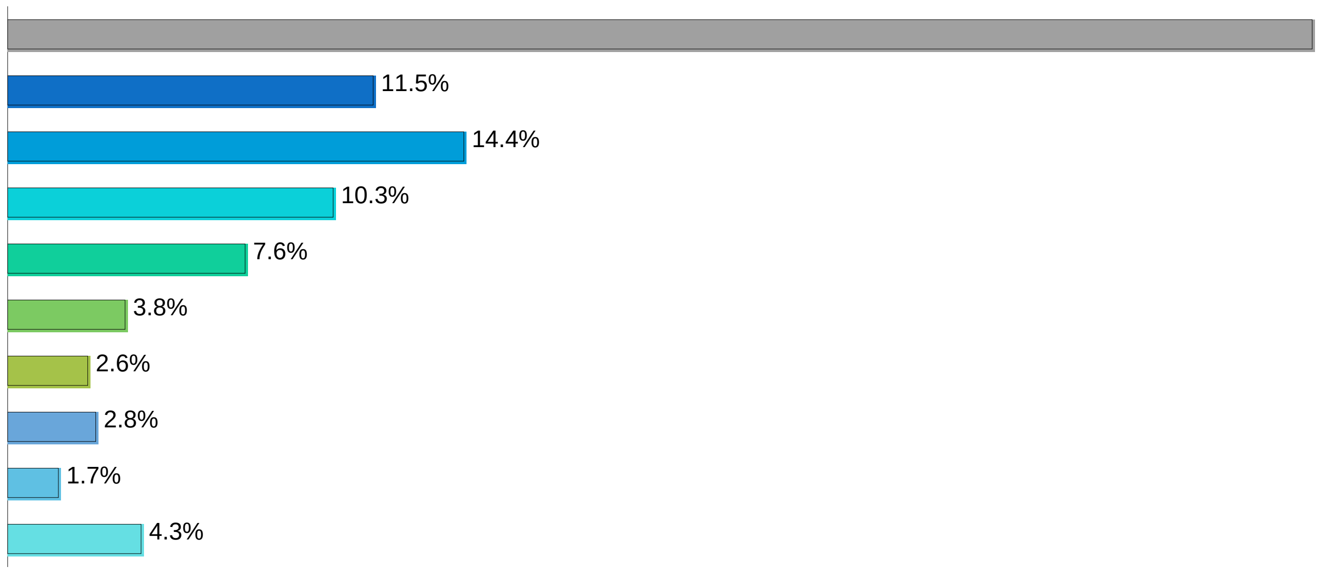
How many overnight stays did you register in 2015? (estimation)

Response rate: **58.9%**

	Nbr
Non response	**909**
<2 000	**255**
2 000-5 000	**319**
5 000-10 000	**227**
10 000-15 000	**167**
20 000-25 000	**83**
25 000-30 000	**57**
30 000-40 000	**62**
40 000-50 000	**37**
>50 000	**94**
Total	**2210**



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Annex 2: Sample characteristics (6)

Most important customer segment

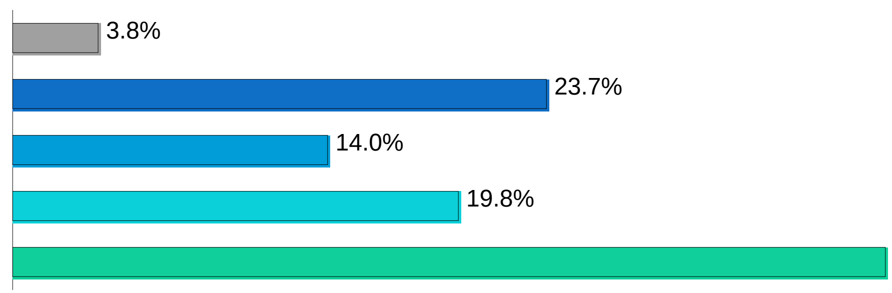
Response rate: **97.2%**

	Nbr
Non response	**61**
Business	**794**
Vacation / leisure	**1219**
MICE	**64**
Other segment	**72**
Total	**2210**

Place

Response rate: **96.2%**

	Nbr
Non response	**84**
City with more than 250'000 inhabitants	**524**
City between 50'000 and 250'000 inhabitants	**310**
City between 10'000 and 50'000 inhabitants	**437**
small city (less than 10'000 inhabitants)	**855**
Total	**2210**



Annex 2: Sample characteristics (7)

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

Response rate: **97.9%**

	Nbr
Non response	**46**
No	**1467**
Yes, hotel chain	**465**
Yes, hotel cooperation	**232**
Total	**2210**

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

	open all year round	two seasons business	one season business (winter)	one season business (summer)	**Total**
Direct - Phone	**19.07**	**17.73**	**7.70**	**16.75**	**18.63**
Direct - Mail / fax	**2.42**	**2.07**	**1.50**	**1.11**	**2.23**
Direct - Walk-In (persons without reservation)	**4.79**	**4.19**	**1.90**	**5.16**	**4.78**
Direct - Contact form on own website (without availabilty check)	**5.28**	**10.78**	**8.70**	**8.56**	**6.11**
Direct - Email	**15.99**	**23.99**	**38.10**	**16.10**	**16.70**
Direct - real time booking over own website with availabilty check	**6.76**	**8.12**	**9.50**	**5.84**	**6.76**
Destination Marketing Organization (DMO) / trade associations	**0.77**	**1.94**	**3.40**	**0.63**	**0.86**
National Tourism Organization (NTO)	**0.46**	**1.02**	**0.90**	**0.91**	**0.56**
Tour operator / Travel agency	**6.42**	**7.70**	**6.20**	**18.72**	**8.03**
Online Booking Agency (OTA)	**23.08**	**17.78**	**15.70**	**19.96**	**22.26**
Hotel chains and cooperations with CRS	**3.24**	**0.36**	**0.50**	**0.49**	**2.68**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**3.41**	**0.19**	**0.20**	**0.20**	**2.76**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**2.76**	**0.91**	**0.00**	**2.86**	**2.62**
Event and Congress organizer	**3.77**	**0.74**	**0.00**	**0.54**	**3.13**
Social Media Channels	**0.40**	**0.54**	**0.20**	**0.69**	**0.45**
other distribution channels	**1.39**	**1.94**	**5.50**	**1.47**	**1.46**

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

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	1*	2*	3*	4*	5*	other category	**Total**
Direct - Phone	**20.82**	**20.16**	**19.33**	**15.40**	**14.24**	**16.83**	**17.82**
Direct - Mail / fax	**0.92**	**1.95**	**2.70**	**2.01**	**2.13**	**1.16**	**2.27**
Direct - Walk-In (persons without reservation)	**8.33**	**7.81**	**5.34**	**3.11**	**2.49**	**5.59**	**4.82**
Direct - Contact form on own website (without availabilty check)	**4.77**	**7.72**	**6.23**	**5.73**	**1.69**	**9.21**	**6.04**
Direct - Email	**11.08**	**14.96**	**17.06**	**17.45**	**17.44**	**17.48**	**16.85**
Direct - real time booking over own website with availabilty check	**6.15**	**6.52**	**7.04**	**8.52**	**7.82**	**7.60**	**7.50**
Destination Marketing Organization (DMO) / trade associations	**0.44**	**0.86**	**1.05**	**0.80**	**1.17**	**0.94**	**0.94**
National Tourism Organization (NTO)	**0.03**	**0.34**	**0.79**	**0.52**	**0.66**	**0.25**	**0.61**
Tour operator / Travel agency	**2.62**	**7.98**	**7.79**	**11.32**	**13.56**	**7.68**	**9.15**
Online Booking Agency (OTA)	**33.46**	**25.68**	**24.52**	**21.99**	**16.99**	**22.71**	**23.53**
Hotel chains and cooperations with CRS	**1.44**	**0.40**	**1.04**	**1.61**	**1.62**	**0.08**	**1.16**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**1.44**	**0.51**	**1.38**	**2.75**	**6.80**	**1.03**	**2.04**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**4.38**	**1.88**	**2.24**	**3.53**	**5.14**	**3.79**	**2.89**
Event and Congress organizer	**0.44**	**0.37**	**1.36**	**3.71**	**6.79**	**1.54**	**2.31**
Social Media Channels	**0.82**	**0.52**	**0.52**	**0.41**	**0.14**	**1.11**	**0.49**
other distribution channels	**2.87**	**2.34**	**1.60**	**1.14**	**1.32**	**3.00**	**1.60**

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

	Less than 20	From 20 to 50	From 50 to 100	100 and over	**Total**
Direct - Phone	**23.20**	**20.02**	**17.43**	**12.92**	**18.55**
Direct - Mail / fax	**1.90**	**2.72**	**2.25**	**1.87**	**2.23**
Direct - Walk-In (persons without reservation)	**6.65**	**5.43**	**3.94**	**2.67**	**4.76**
Direct - Contact form on own website (without availabilty check)	**8.32**	**7.39**	**4.84**	**3.06**	**6.06**
Direct - Email	**16.42**	**18.03**	**17.57**	**14.57**	**16.73**
Direct - real time booking over own website with availabilty check	**6.30**	**7.28**	**6.90**	**6.49**	**6.79**
Destination Marketing Organization (DMO) / trade associations	**0.69**	**1.06**	**0.77**	**0.62**	**0.81**
National Tourism Organization (NTO)	**0.65**	**0.62**	**0.56**	**0.41**	**0.56**
Tour operator / Travel agency	**3.43**	**6.96**	**9.67**	**12.72**	**8.05**
Online Booking Agency (OTA)	**27.51**	**23.11**	**20.66**	**17.59**	**22.33**
Hotel chains and cooperations with CRS	**0.22**	**0.72**	**3.75**	**6.86**	**2.68**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**0.43**	**1.14**	**3.68**	**6.46**	**2.75**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**1.19**	**2.30**	**2.82**	**4.36**	**2.64**
Event and Congress organizer	**0.38**	**1.06**	**3.56**	**8.31**	**3.13**
Social Media Channels	**0.38**	**0.67**	**0.47**	**0.23**	**0.45**
other distribution channels	**2.34**	**1.49**	**1.17**	**0.87**	**1.48**

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

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	Business	Vacation / leisure	MICE	Other segment	Total
Direct - Phone	21.24	16.44	17.42	27.66	18.61
Direct - Mail / fax	2.89	1.64	4.38	2.45	2.21
Direct - Walk-In (persons without reservation)	4.80	4.65	3.89	6.72	4.75
Direct - Contact form on own website (without availabilty check)	4.74	7.04	4.14	7.76	6.13
Direct - Email	18.42	15.34	17.42	21.52	16.74
Direct - real time booking over own website with availabilty check	6.05	7.48	5.63	4.76	6.81
Destination Marketing Organization (DMO) / trade associations	0.62	0.88	2.36	1.92	0.86
National Tourism Organization (NTO)	0.48	0.63	0.39	0.65	0.57
Tour operator / Travel agency	3.76	10.93	6.75	5.66	7.99
Online Booking Agency (OTA)	21.23	23.63	16.66	15.03	22.25
Hotel chains and cooperations with CRS	4.51	1.71	1.42	0.54	2.70
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	4.70	1.66	3.02	0.34	2.77
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.04	3.12	2.27	0.68	2.62
Event and Congress organizer	3.23	2.64	12.39	1.06	3.10
Social Media Channels	0.30	0.51	0.56	0.75	0.44
other distribution channels	0.99	1.72	1.27	2.52	1.46

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

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	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	10.99	18.36	21.23	21.86	18.54
Direct - Mail / fax	1.81	2.31	2.64	2.14	2.18
Direct - Walk-In (persons without reservation)	3.15	4.60	5.47	5.51	4.79
Direct - Contact form on own website (without availabilty check)	3.19	5.78	5.67	8.09	6.05
Direct - Email	13.97	15.21	17.03	18.71	16.68
Direct - real time booking over own website with availabilty check	8.42	5.21	5.72	6.76	6.73
Destination Marketing Organization (DMO) / trade associations	0.79	0.53	0.76	1.07	0.86
National Tourism Organization (NTO)	0.40	0.68	0.43	0.70	0.57
Tour operator / Travel agency	7.55	7.44	8.57	8.20	8.00
Online Booking Agency (OTA)	29.22	21.60	20.56	19.49	22.42
Hotel chains and cooperations with CRS	3.58	5.47	3.32	0.90	2.73
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	5.14	4.97	2.25	0.78	2.77
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5.33	2.70	1.95	1.27	2.62
Event and Congress organizer	5.17	3.57	2.51	2.04	3.13
Social Media Channels	0.25	0.29	0.51	0.59	0.45
other distribution channels	1.06	1.31	1.36	1.87	1.48

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

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	No	Yes, hotel chain	Yes, hotel cooperation	Total
Direct - Phone	20.31	12.50	18.84	18.47
Direct - Mail / fax	2.27	2.05	2.46	2.24
Direct - Walk-In (persons without reservation)	5.37	3.13	4.22	4.76
Direct - Contact form on own website (without availabilty check)	7.49	2.64	4.18	6.09
Direct - Email	17.53	14.24	16.21	16.68
Direct - real time booking over own website with availabilty check	6.74	5.61	9.34	6.77
Destination Marketing Organization (DMO) / trade associations	0.88	0.64	1.10	0.85
National Tourism Organization (NTO)	0.66	0.26	0.55	0.56
Tour operator / Travel agency	8.09	8.07	7.65	8.04
Online Booking Agency (OTA)	23.53	18.32	23.13	22.37
Hotel chains and cooperations with CRS	0.35	10.15	2.73	2.71
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	1.02	8.22	2.90	2.77
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.16	4.09	2.71	2.63
Event and Congress organizer	1.57	8.73	1.85	3.14
Social Media Channels	0.49	0.35	0.35	0.44
other distribution channels	1.56	1.03	1.79	1.47

Annex 4 (table of means): OTAs by category

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	1*	2*	3*	4*	5*	other category	**Total**
Agoda	**0.64**	**0.43**	**0.59**	**0.99**	**1.81**	**0.62**	**0.79**
Bergfex	**0.00**	**0.00**	**0.31**	**1.12**	**0.88**	**0.00**	**0.57**
Booking.com	**76.18**	**72.42**	**62.28**	**57.36**	**60.55**	**64.00**	**61.91**
eBookers (Orbitz)	**0.00**	**0.04**	**0.30**	**0.97**	**1.33**	**0.26**	**0.55**
Expedia	**9.57**	**9.58**	**10.10**	**15.22**	**21.58**	**9.13**	**12.44**
Hotel.de	**0.18**	**1.34**	**2.34**	**1.63**	**0.49**	**1.08**	**1.80**
Hotels.com	**0.36**	**1.90**	**1.91**	**2.15**	**2.10**	**2.15**	**1.98**
HRS	**1.64**	**5.92**	**13.21**	**9.44**	**2.26**	**4.74**	**9.98**
Hotelzon	**0.00**	**0.00**	**0.08**	**0.24**	**0.00**	**0.00**	**0.12**
Lastminute.com (Travelocity)	**0.25**	**0.16**	**0.24**	**0.47**	**0.38**	**0.08**	**0.31**
Orbitz Travel	**0.00**	**0.14**	**0.25**	**0.78**	**1.15**	**0.21**	**0.46**
Venere	**0.89**	**0.71**	**0.97**	**0.88**	**0.47**	**0.68**	**0.87**
Tiscover	**0.00**	**0.01**	**0.21**	**0.62**	**0.00**	**0.06**	**0.30**
Unister (ab-in-den-urlaub.de, hotelreservierung.de, reise.de, etc.)	**0.11**	**0.40**	**0.19**	**0.23**	**0.00**	**0.17**	**0.21**
other platforms (1)	**8.57**	**5.14**	**4.82**	**5.30**	**4.72**	**12.43**	**5.35**
other platforms (2)	**1.46**	**0.79**	**1.41**	**1.20**	**0.44**	**3.68**	**1.30**

Only OTAs with more than 0.3% market share resp. belonging to one of the big players shown.

Hotrec Hospitality Europe

Annex 4 (table of means): OTAs by size of hotel

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	Less than 20	From 20 to 50	From 50 to 100	100 and over	**Total**
Agoda	0.27	0.64	0.93	0.93	0.70
Bergfex	0.35	0.88	0.22	0.42	0.51
Booking.com	69.64	62.82	58.22	59.02	62.34
eBookers (Orbitz)	0.16	0.30	0.51	1.14	0.53
Expedia	6.25	10.35	13.57	15.47	11.46
Hotel.de	1.69	2.18	2.16	0.87	1.74
Hotels.com	1.16	1.87	4.03	7.41	3.59
HRS	11.49	13.22	10.07	4.45	9.95
Hotelzon	0.00	0.04	0.64	1.21	0.46
Lastminute.com (Travelocity)	0.03	0.24	0.34	0.46	0.27
Orbitz Travel	0.09	0.22	0.76	0.99	0.50
Venere	0.66	0.93	0.92	0.51	0.76
Tiscover	0.29	0.21	0.20	0.29	0.25
Unister (ab-in-den-urlaub.de, hotelreservierung.de, reise.de, etc.)	0.07	0.30	0.19	0.08	0.17
other platforms (1)	5.61	4.20	4.90	4.52	4.73
other platforms (2)	1.62	0.87	1.06	0.98	1.10

Only OTAs with more than 0.3% market share resp. belonging to one of the big players shown.

Hotrec Hospitality Europe

Annex 4 (table of means): OTAs by type of hotel

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	Business	Vacation / leisure	MICE	Other segment	**Total**
Agoda	**0.58**	**0.73**	**1.14**	**0.33**	**0.68**
Bergfex	**0.19**	**0.78**	**0.00**	**0.31**	**0.52**
Booking.com	**55.75**	**67.23**	**51.88**	**64.88**	**62.32**
eBookers (Orbitz)	**0.56**	**0.52**	**0.75**	**0.08**	**0.53**
Expedia	**10.97**	**11.78**	**13.67**	**6.94**	**11.40**
Hotel.de	**2.81**	**0.95**	**1.40**	**3.94**	**1.75**
Hotels.com	**4.33**	**3.34**	**2.46**	**0.42**	**3.61**
HRS	**17.27**	**4.49**	**15.95**	**13.90**	**9.96**
Hotelzon	**0.65**	**0.28**	**0.09**	**0.00**	**0.41**
Lastminute.com (Travelocity)	**0.23**	**0.31**	**0.39**	**0.00**	**0.27**
Orbitz Travel	**0.61**	**0.43**	**0.63**	**0.21**	**0.50**
Venere	**0.68**	**0.85**	**0.47**	**0.98**	**0.78**
Tiscover	**0.05**	**0.27**	**0.39**	**0.83**	**0.21**
Unister (ab-in-den-urlaub.de, hotelreservierung.de, reise.de, etc.)	**0.18**	**0.15**	**0.33**	**0.40**	**0.18**
other platforms (1)	**3.65**	**5.44**	**6.47**	**4.06**	**4.75**
other platforms (2)	**0.75**	**1.45**	**1.82**	**0.42**	**1.17**

Only OTAs with more than 0.3% market share resp. belonging to one of the big players shown.

Hospitality Europe

Annex 4 (table of means): OTAs by size of hotel location

Hes·so// VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	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**
Agoda	**1.56**	**0.49**	**0.25**	**0.39**	**0.69**
Bergfex	**0.10**	**0.33**	**0.24**	**1.04**	**0.53**
Booking.com	**54.51**	**60.66**	**60.56**	**69.14**	**62.26**
eBookers (Orbitz)	**1.08**	**0.94**	**0.18**	**0.17**	**0.53**
Expedia	**19.32**	**9.74**	**9.51**	**7.55**	**11.40**
Hotel.de	**1.28**	**1.79**	**2.57**	**1.53**	**1.71**
Hotels.com	**4.20**	**6.01**	**3.88**	**2.17**	**3.62**
HRS	**7.59**	**10.37**	**14.05**	**9.37**	**9.98**
Hotelzon	**0.42**	**1.04**	**0.59**	**0.22**	**0.47**
Lastminute.com (Travelocity)	**0.59**	**0.18**	**0.17**	**0.13**	**0.27**
Orbitz Travel	**1.16**	**0.37**	**0.48**	**0.12**	**0.51**
Venere	**0.69**	**0.82**	**0.82**	**0.72**	**0.75**
Tiscover	**0.02**	**0.03**	**0.09**	**0.58**	**0.25**
Unister (ab-in-den-urlaub.de, hotelreservierung.de, reise.de, etc.)	**0.07**	**0.22**	**0.35**	**0.14**	**0.18**
other platforms (1)	**4.91**	**4.91**	**4.47**	**4.73**	**4.75**
other platforms (2)	**0.95**	**0.82**	**1.30**	**1.35**	**1.16**

Only OTAs with more than 0.3% market share resp. belonging to one of the big players shown.

Hotrec Hospitality Europe

Annex 4 (table of means): OTAs by type of hotel

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	No	Yes, hotel chain	Yes, hotel cooperation	**Total**
Agoda	0.63	0.91	0.67	0.70
Bergfex	0.71	0.00	0.48	0.52
Booking.com	64.37	57.97	58.67	62.22
eBookers (Orbitz)	0.28	1.03	0.94	0.53
Expedia	9.40	16.45	13.22	11.49
Hotel.de	2.04	0.78	2.09	1.75
Hotels.com	1.70	9.74	1.69	3.59
HRS	11.87	4.00	11.76	10.01
Hotelzon	0.06	1.71	0.19	0.46
Lastminute.com (Travelocity)	0.22	0.47	0.21	0.27
Orbitz Travel	0.24	1.28	0.40	0.50
Venere	0.93	0.38	0.68	0.77
Tiscover	0.29	0.007	0.10	0.20
Unister (ab-in-den-urlaub.de, hotelreservierung.de, reise.de, etc.)	0.22	0.02	0.25	0.18
other platforms (1)	4.99	3.56	5.39	4.70
other platforms (2)	1.26	0.49	1.89	1.15

Only OTAs with more than 0.3% market share resp. belonging to one of the big players shown.

Hospitality Europe