The umbrella association of Hotels, Restaurants and Cafés in Europe

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

European Hotel Distribution Study

Results for the Reference Year 2017

May 29, 2018

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Executive Summary

Evolutions in the distribution market between 2013 and 2017

- This years' distribution study of HOTREC shows, that between 2013 and 2017 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 over 4 percentage points from 57,6% in 2013 to 52% in 2017 (weighted results including data from hotel chains).
- The share of OTAs in hotel room bookings increased by over 6% points, i.e. from 19,7% to 26%, over the last 4 years.

Executive Summary

Dependency on Online Travel Agents

- The study shows that especially the small hotel segments (with less than 20 rooms) are significantly more dependent on OTAs (29,3%) than the average hotel.
- Hotel cooperations are significantly less dependent on OTAs (22,5%) than the average of all hotels.
- Yet, the dependency increased between 2013 and 2017 both in the case of smaller hotels and bigger hotels, as well as in the case of individual and branded hotels.

Executive Summary

Who dominates the Online Travel Agent market?

- The 3 main market players within the OTA market remain Booking Holding (Booking.com), Expedia Group and to a lesser extent HRS, with an aggregated market share of 92%.
- These 3 players could maintain their overall market share over the past 2 years.
- Booking.com is by far the most influential OTA, with a share of 66,4%. The dominance of Booking.com has been rising over the last 4 years by more than 6% between 2013 and 2017 (i.e. from 60% to 66,4%).
- Expedia could maintain its 2015 market share (16,6% in 2017 compared with 16,8% in 2015), while HRS lost market shares and ranks third in the OTA market with a relative share of 9% in 2017 compared to 16,6% back in 2013.

Executive Summary

The OTA – hotel relationship

- Regarding some aspects of the relations with OTAs, the majority of hoteliers (50%) feels pressured by OTAs to accept platforms terms and conditions (e.g. regarding cancellation policy, special discounts) that hotels would otherwise voluntarily not offer. Small and independent hotels feel more pressured than big hotels or hotel chains.
- When having disputes with OTAs (6 out of 10 hotels!), the majority of concerned hotels (70%) consider that there is not a fair and effective solution to the disagreements. Again, small and independent hotels seem to have more problems with dispute resolution than bigger hotels or hotel chains.

Table of contents

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Hochschule für Wirtschaft & Tourismus

- Background to the survey, methodology and sample
- Market share of distribution channels
  - European level
  - Results by country
- Relative OTA market shares
- OTA – hotel relationship
- Distribution channel management
- Meta-search engines
- *Annex 1: questionnaire*
- *Annex 2: sample*
- *Annex 3: table of means for distribution channels*
- *Annex 4: table of means for OTAs*

Hospitality Europe

The survey

The survey: background

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- In order to monitor the current situation of distribution (online as well as offline) within the European hotel industry, especially in relation to the role of online travel agencies (OTA), **HOTREC**, the umbrella association of Hotels, Restaurants and Cafés in Europe, has decided to conduct an online survey between February and March 2018 **together with hotel associations from HOTREC member countries across Europe for the reference year 2017**.
- Similar studies have been conducted in 2014 for the **reference year 2013** and in 2016 for the **reference year 2015.** The present study allows therefore to illustrate the evolution of distribution channels and players between 2013, 2015 and 2017.

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The questionnaire

- The online questionnaire asked for market shares of different direct and indirect distribution channels (in terms of **overnights**) as well as the specific market shares of the OTAs (such as Booking.com, Expedia, and HRS).
- Further questions queried the hotel-OTA relationship and analyzed the way how hoteliers manage online distribution channels and interfaces with meta-search engines.
- The final part comprises questions covering characteristics of the hotel property (star rating, the size of the hotel in terms of rooms offered, 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 more than 20 languages with the help of the respective national hotel associations.
- The survey was addressed to the member hotels of the different hotel associations and **conducted between February and March 2018**. The collected data cover the **reference year 2017**.
- The different hotel associations contacted their members either by email or through newsletters.
- In addition to information of individual hotel owners, **data from hotel chains** could be integrated, either on an **aggregated level (country)** or a **property-level**.

Methodological remarks: sampling

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- Overall **2’744 responses** from individual hotels could be collected through the online survey. Yet response rates by country vary strongly in the survey (see following slide).
- **Data from 2 hotel chains** allowed to integrate further **18 responses** on a property-level for 5 countries leading to an overall sample size of **2’762 valid observations**. For five countries, **aggregated data for distribution channels and OTA market shares** from **6 hotel chains comprising 650 hotels** with 101’981 rooms could be integrated into the analysis:
  - Germany: 3 chains with 456 hotels
  - Data from one chain in Finland, Hungary, Norway and Sweden

- The study is therefore based on observations from a total of **3’412 European hotels**.

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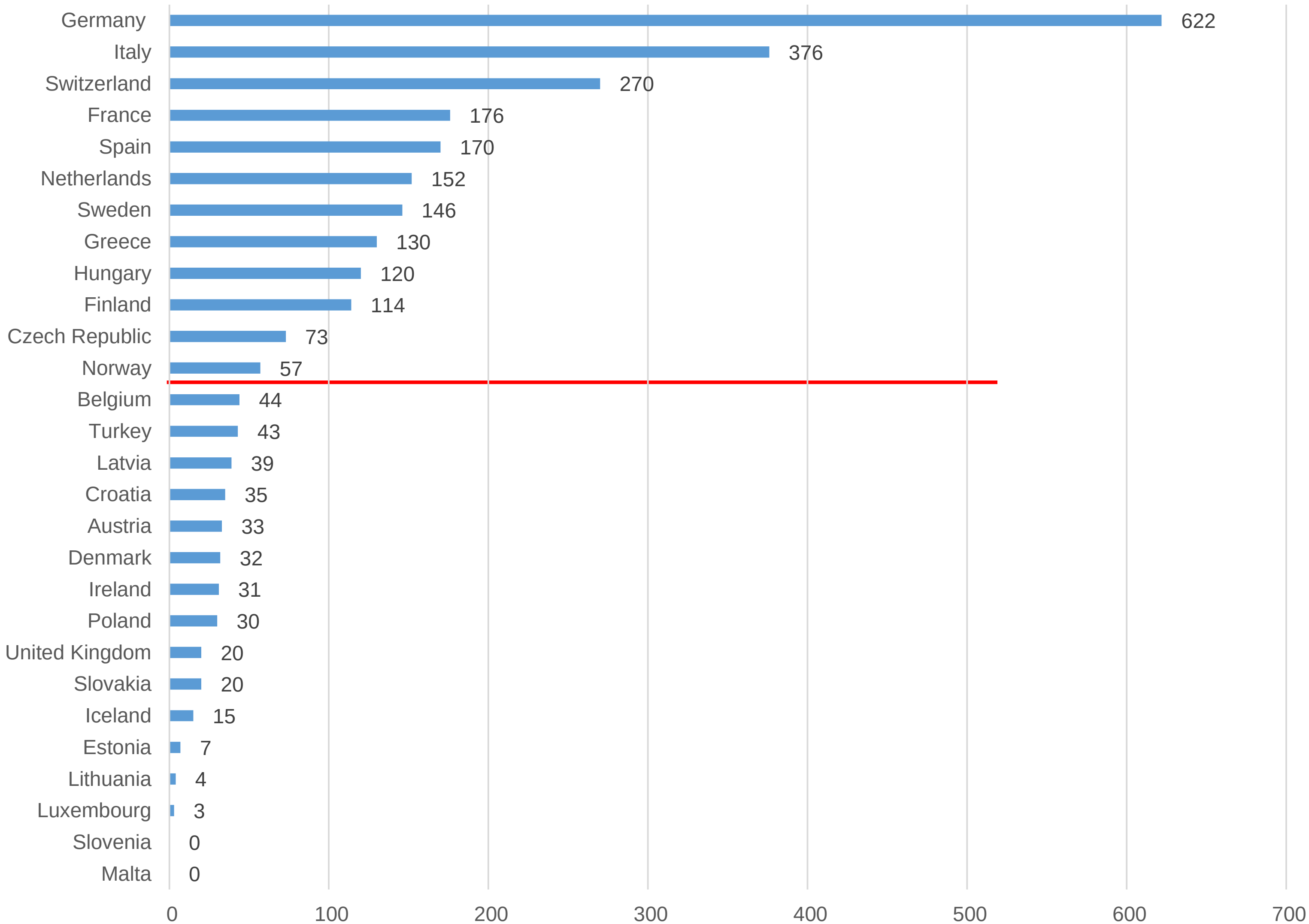
Number of survey responses by country (total n=2'762)



Response rates by country

	Nbe of hotel establishments (2013/2015)	Nbe of hotel establishments (2016)	HOTREC survey responses	aggregated data chain hotels -> nbe observations	Total observations	Response rates
Austria	12 625	12 366	33		33	0.3%
Belgium	1 557	1 522	44		44	2.9%
Croatia	938	1 011	35		35	3.5%
Czech Republic	5 992	6 022	73		73	1.2%
Denmark	525	537	32		32	6.0%
Estonia	414	413	7		7	1.7%
Finland	777	772	114	9	123	15.9%
France	18 328	18 424	176		176	1.0%
Germany	33 635	33 061	622	456	1 078	3.3%
Greece	10 111	9 987	130		130	1.3%
Hungary	2 185	2 202	120	12	132	6.0%
Iceland	402	397	15		15	3.8%
Ireland	2 348	:	31		31	1.3%
Italy	33 202	33 166	376		376	1.1%
Latvia	332	343	39		39	11.4%
Lithuania	418	420	4		4	1.0%
Luxembourg	236	232	3		3	1.3%
Malta	161	164	0		0	0.0%
Netherlands	3 525	3 585	152		152	4.2%
Norway	1 082	:	57	93	150	13.9%
Poland	3 723	3 965	30		30	0.8%
Slovakia	1 509	1 475	20		20	1.4%
Slovenia	681	692	0		0	0.0%
Spain	19 718	19 524	170		170	0.9%
Sweden	1 992	2 011	146	80	226	11.2%
Switzerland	5 055	4 949	270		270	5.5%
Turkey	3 125	:	43		43	1.4%
United Kingdom	40 272	:	20		20	0.0%
			2 762		**3 412**	

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. Country-specific weighting factors for 12 countries with sufficient observations in the survey (n>70) have been used.
  - ✓ For **countries with insufficient number of observations** and hence limited validity of country-specific estimates, the **overall sample mean** is used.

Weighting factors by country

	HOTREC survey responses	Aggregated responses from chains	Total observations	Overnights 2016	Individual weighting only for countries with n>70	
Czech Republic	73		73	36 492 739	**1.9%**	
Finland	114	9	123	16 628 662	**0.9%**	
France	176		176	203 877 048	**10.5%**	
Germany	622	456	1 078	279 596 765	**14.3%**	
Greece	130		130	79 885 024	**4.1%**	
Hungary	120	12	132	22 738 655	**1.2%**	
Italy	376		376	267 566 038	**13.7%**	
Netherlands	152		152	44 589 977	**2.3%**	
Norway	57	93	150	22 483 596	**1.2%**	
Spain	170		170	331 168 945	**17.0%**	
Sweden	146	80	226	35 315 426	**1.8%**	
Switzerland	270		270	35 532 576	**1.8%**	
Austria	33		33	90 084 612	4.6%	**29.4%**
Belgium	44		44	17 183 395	0.9%	
Croatia	35		35	23 262 846	1.2%	
Denmark	32		32	15 008 216	0.8%	
Estonia	7		7	5 054 025	0.3%	
Iceland	15		15	5 169 466	0.3%	
Ireland	31		31	26 264 513	1.3%	
Latvia	39		39	3 547 571	0.2%	
Lithuania	4		4	3 835 278	0.2%	
Luxembourg	3		3	1 753 464	0.1%	
Malta	0		0	8 700 431	0.4%	
Poland	30		30	44 323 448	2.3%	
Slovakia	20		20	9 610 588	0.5%	
Slovenia	0		0	7 081 194	0.4%	
Turkey (2015)	43		43	133 789 181	6.9%	
United Kingdom (2013)	20		20	178 225 113	9.1%	
	2 762		**3 412**	**1 948 768 792**		

Source: Survey, Eurostat

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:
  - Germany: indiv. Hotels 55% / branded hotels 45%
  - Hungary: indiv. Hotels 67% / branded hotels 33%
  - Finland: indiv. Hotels 61,2 % / branded hotels 38,8%
  - Norway: indiv. Hotels 20,5% / branded hotels 79,5%
  - Sweden: indiv. Hotels 56% / branded hotels 44%

Summary of sample characteristics (Europe)

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- Overall, the following main observations can be made with regard to the sample characteristics (further details are in annex 2):
  - Hotel Classification – 75,5% of properties in the sample are classified. 3 star (43,5%) and 4 star (33,8%) hotels make up the large majority of the classified hotels in the sample.
  - Size – The average size of the hotels in the sample is 38 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 57,6% of hotels, followed by business clients for 34,9% of properties
  - Management – Nearly 70% of hotels are individual properties whereas 19,8% belong to a hotel chain and 10,4% to a hotel cooperation.

Distribution channels

Market shares of distribution channels in Europe 2017: overall sample

Unweighted overall sample (2'593 valid observations for the distribution channels)	Market share 2017		confidence interval (bootstrap)	
Direct - Phone	18.5	55.1	18.0	19.0
Direct - Mail / fax	2.0		1.8	2.1
Direct - Walk-In (persons without reservation)	4.4		4.2	4.6
Direct - Contact form on own website (without availabilty check)	6.0		5.6	6.3
Direct - Email	16.0		15.5	16.7
Direct - real time booking over own website with availabilty check	8.2		7.9	8.6
Destination Marketing Organization (DMO) / trade associations	0.9	1.3	0.5	1.3
National Tourism Organization (NTO)	0.5		0.2	0.8
Tour operator / Travel agency	7.8	12.7	7.3	8.3
Hotel chains and cooperations with CRS	1.0		0.6	1.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.9		1.5	2.3
Event and Congress organizer	1.9		1.6	2.3
Online Booking Agency (OTA)	26.9	29.3	26.1	27.8
Globale Distributionssysteme (GDS)	1.9		1.4	2.4
Social Media Channels	0.5		0.2	0.8
other distribution channels	1.6	1.6	1.1	2.1

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

Evolution market shares of distribution channels in Europe 2013 to 2017: overall sample

	Market share 2017 (n=2'593)		Market share 2015 (n=2'188)		Market share 2013 (n=2'221)		*DELTA (2017-2013)*	
Direct - Phone	18.5	55.1	18.7	55.2	21.1	59.4	*-2.5*	*-4.2*
Direct - Mail / fax	2.0		2.3		3.1		*-0.9*	
Direct - Walk-In (persons without reservation)	4.4		4.8		6.0		*-1.2*	
Direct - Contact form on own website (without availabilty check)	6.0		6.1		6.1		*0.0*	
Direct - Email	16.0		16.7		16.1		*0.5*	
Direct - real time booking over own website with availabilty check	8.2		6.8		6.9		*-0.2*	
Destination Marketing Organization (DMO) / trade associations	0.9	1.3	0.9	1.4	1.0	1.7	*-0.2*	*-0.2*
National Tourism Organization (NTO)	0.5		0.6		0.6		*-0.1*	
Tour operator / Travel agency	7.8	12.7	8.0	16.3	9.6	15.7	*-1.6*	*0.6*
Hotel chains and cooperations with CRS	1.0		2.6		1.4		*1.2*	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.9		2.6		2.8		*-0.2*	
Event and Congress organizer	1.9		3.1		1.9		*1.2*	
Online Booking Agency (OTA)	26.9	29.3	22.3	25.5	19.3	21.8	***3.0***	*3.7*
Globale Distribution Systems (GDS)	1.9		2.7		2.0		*0.7*	
Social Media Channels	0.5		0.5		0.5		*0.0*	
Other distribution channels	1.6	1.6	1.5	1.5	1.5	1.5	*0.0*	*0.0*

Market shares in % of overnights.

Market shares of distribution channels in Europe 2017: weighted values

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	Rest Europe	Czech Republic	Finland	France	Germany	Greece	Hungary	Italy	Netherlands	Norway	Spain	Sweden	Switzerland	Weighted Values 2017		Un-weighted Values 2017	
weigthing	*29.4%*	*1.9%*	*0.9%*	*10.5%*	*14.3%*	*4.1%*	*1.2%*	*13.7%*	*2.3%*	*1.2%*	*17.0%*	*1.8%*	*1.8%*				
Direct - Phone	15.4	15.1	28.6	26.3	20.8	17.6	9.2	18.1	12.4	11.8	7.9	16.5	18.3	**16.5**	**52.0**	18.5	**55.1**
Direct - Mail / fax	3.3	0.6	0.2	1.6	2.1	0.9	0.5	1.4	6.0	1.8	1.3	0.2	1.7	**2.1**		2.0	
Direct - Walk-In (persons without reservation)	4.4	4.3	4.0	8.5	3.7	5.6	3.4	4.3	2.7	2.8	3.2	3.5	5.1	**4.5**		4.4	
Direct - Contact form on own website (without availabilty check)	4.6	9.3	4.9	3.7	5.3	4.4	6.2	10.2	2.6	8.0	3.3	3.5	6.9	**5.3**		6.0	
Direct - Email	14.6	18.8	15.7	10.3	18.0	8.4	15.5	24.7	11.7	20.0	6.4	19.0	18.9	**14.6**		16.0	
Direct - real time booking over own website with availabilty check	8.1	8.2	11.6	12.5	10.9	6.5	5.8	5.5	10.5	13.2	9.9	12.0	8.2	**9.0**		8.2	
Destination Marketing Organization (DMO) / trade associations	0.7	0.3	0.5	0.7	0.4	0.1	0.2	1.9	0.5	0.3	1.3	0.8	1.4	**0.9**	**1.3**	0.9	**1.3**
National Tourism Organization (NTO)	0.4	0.1	0.0	0.4	0.2	0.2	0.7	1.0	0.1	0.0	0.1	0.1	1.1	**0.4**		0.5	
Tour operator / Travel agency	10.7	10.0	4.5	3.8	2.7	25.5	13.7	8.1	3.2	12.7	15.3	7.2	3.8	**9.5**	**16.3**	7.8	**12.7**
Hotel chains and cooperations with CRS	0.9	0.6	1.6	2.5	0.4	0.0	0.6	0.2	0.4	0.1	2.2	1.3	0.6	**1.1**		1.0	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.0	1.6	1.1	1.1	1.0	3.1	2.9	1.2	0.9	1.1	7.8	0.4	0.7	**3.2**		1.9	
Event and Congress organizer	3.2	3.2	2.3	1.9	1.8	0.4	3.4	0.6	0.9	1.8	5.1	1.6	1.3	**2.6**		1.9	
Online Booking Agency (OTA)	25.7	25.6	18.2	22.4	27.8	23.6	32.3	20.3	44.8	15.8	30.8	24.7	27.7	**26.0**	**29.0**	26.9	**29.3**
Globale Distributionssysteme (GDS)	2.2	1.2	3.3	2.0	3.4	0.8	1.1	0.3	1.8	9.5	4.2	7.8	1.1	**2.5**		1.9	
Social Media Channels	0.5	0.8	0.5	0.3	0.3	1.1	0.4	0.9	0.6	0.1	0.2	0.5	0.2	**0.5**		0.5	
other distribution channels	1.3	0.5	2.9	2.2	1.1	2.0	4.1	1.5	1.1	1.0	1.1	0.9	2.9	**1.4**	**1.4**	1.6	**1.6**

Market shares in % of overnights.

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Evolution of market shares of distribution channels in Europe 2013 - 2017: weighted samples

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	Weighted market share 2017		Weighted market share 2015		Weighted market share 2013		DELTA (2017-2013)	
Direct - Phone	16.5	52.0	17.2	52.9	20.5	57.6	-4.0	-5.60
Direct - Mail / fax	2.1		2.4		3.2		-1.1	
Direct - Walk-In (persons without reservation)	4.5		4.5		5.8		-1.3	
Direct - Contact form on own website (without availabilty check)	5.3		5.4		5.8		-0.5	
Direct - Email	14.6		15.6		14.9		-0.3	
Direct - real time booking over own website with availabilty check	9.0		7.7		7.4		1.6	
Destination Marketing Organization (DMO) / trade associations	0.9	1.3	0.9	1.4	1.1	1.6	-0.2	-0.3
National Tourism Organization (NTO)	0.4		0.5		0.5		-0.1	
Tour operator / Travel agency	9.5	16.3	9.1	17.9	10.3	17.2	-0.8	-0.9
Hotel chains and cooperations with CRS	1.1		2.4		1.6		-0.5	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.2		3.5		3.4		-0.3	
Event and Congress organizer	2.6		2.9		1.8		0.7	
Online Booking Agency (OTA)	26.0	29.0	23.1	26.4	19.7	22.2	**6.3**	6.8
Globale Distributionssysteme (GDS)	2.5		2.9		2.0		0.5	
Social Media Channels	0.5		0.4		0.4		0.0	
other distribution channels	1.4	1.4	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)

- Czech Republic
- Finland
- France
- Germany
- Greece
- Hungary
- Italy
- Netherlands
- Norway
- Spain
- Sweden
- Switzerland

Market shares of distribution channels 2017: Czech Republic

Unweighted sample: n=65	Market share		confidence interval (bootstrap)	
Direct - Phone	15.1	56.3	12.2	19.3
Direct - Mail / fax	0.6		0.4	0.8
Direct - Walk-In (persons without reservation)	4.3		3.5	5.1
Direct - Contact form on own website (without availability check)	9.3		5.9	12.6
Direct - Email	18.8		15.6	22.3
Direct - real time booking over own website with availability check	8.2		6.2	10.3
Destination Marketing Organization (DMO) / trade associations	0.3	0.3	0.1	0.5
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	10.0	15.4	6.5	13.6
Hotel chains and cooperations with CRS	0.6		0.4	0.8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		1.2	2.0
Event and Congress organizer	3.2		2.6	3.8
Online Booking Agency (OTA)	25.6	27.5	21.0	30.0
Globale Distributionssysteme (GDS)	1.2		0.8	1.6
Social Media Channels	0.8		0.4	1.2
other distribution channels	0.5	0.5	0.3	0.8

Market shares in % of overnights.

Market shares of distribution channels in Czech Republic: 2013 to 2017

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	Market share 2017 (n=65)		Market share 2015 (n=52)		Market share 2013 (n=82)		DELTA (2017-2013)	
Direct - Phone	15.1	56.3	12.1	53.4	17.4	58.0	-2.28	-1.65
Direct - Mail / fax	0.6		0.8		0.9		-0.31	
Direct - Walk-In (persons without reservation)	4.3		5.2		6.1		-1.79	
Direct - Contact form on own website (without availabilty check)	9.3		8.1		8.3		1.01	
Direct - Email	18.8		22.2		18.8		0.01	
Direct - real time booking over own website with availabilty check	8.2		5.0		6.5		1.71	
Destination Marketing Organization (DMO) / trade associations	0.3	0.3	0.3	0.7	0.8	0.9	-0.48	-0.52
National Tourism Organization (NTO)	0.1		0.4		0.1		-0.04	
Tour operator / Travel agency	10.0	15.4	13.1	19.0	12.7	19.9	-2.67	-4.51
Hotel chains and cooperations with CRS	0.6		0.3		1.7		-1.06	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		2.0		2.0		-0.44	
Event and Congress organizer	3.2		3.6		3.6		-0.34	
Online Booking Agency (OTA)	25.6	27.5	23.7	25.6	18.1	19.6	**7.46**	7.91
Globale Distributionssysteme (GDS)	1.2		1.6		1.1		0.06	
Social Media Channels	0.8		0.3		0.4		0.39	
other distribution channels	0.5	0.5	1.4	1.4	1.7	1.7	-1.24	-1.24

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Finland

Unweighted sample: n=109	Market share		confidence interval (bootstrap)	
Direct - Phone	28.8	62.9	25.3	32.1
Direct - Mail / fax	0.2		0.0	0.4
Direct - Walk-In (persons without reservation)	4.3		3.7	5.0
Direct - Contact form on own website (without availability check)	5.7		4.2	7.4
Direct - Email	14.7		12.2	16.6
Direct - real time booking over own website with availability check	9.1		7.4	10.8
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.3	0.9
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	5.5	10.8	4.1	6.8
Hotel chains and cooperations with CRS	1.7		1.3	2.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		0.7	1.3
Event and Congress organizer	2.7		2.3	3.1
Online Booking Agency (OTA)	19.2	22.3	16.5	21,8
Globale Distributionssysteme (GDS)	2.6		2.2	3.0
Social Media Channels	0.5		0.2	0.8
other distribution channels	3.3	3.3	2.9	3.7

Market shares in % of overnights.

Market shares of distribution channels in Finland: 2013 to 2017

	Market share 2017 (n=109)		Market share 2015 (n=50)		Market share 2013 (n=66)		DELTA	
Direct - Phone	28.8	62.9	27.9	65.2	32.9	69.8	-4.01	-6.83
Direct - Mail / fax	0.2		0.6		1.0		-0.73	
Direct - Walk-In (persons without reservation)	4.3		4.9		5.0		-0.64	
Direct - Contact form on own website (without availabilty check)	5.7		6.4		5.9		-0.19	
Direct - Email	14.7		17.4		18.9		-4.18	
Direct - real time booking over own website with availabilty check	9.1		7.9		6.2		2.92	
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.6	0.9	2.3	2.5	-1.71	-1.84
National Tourism Organization (NTO)	0.1		0.3		0.2		-0.13	
Tour operator / Travel agency	5.5	10.8	5.3	13.6	5.7	12.8	-0.20	-2.00
Hotel chains and cooperations with CRS	1.7		3.1		1.3		0.36	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		1.6		2.9		-1.93	
Event and Congress organizer	2.7		3.5		2.9		-0.23	
Online Booking Agency (OTA)	19.2	22.3	16.2	18.4	11.1	13.2	**8.10**	9.14
Globale Distributionssysteme (GDS)	2.6		2.0		1.8		0.76	
Social Media Channels	0.5		0.2		0.3		0.28	
other distribution channels	3.3	3.3	2.0	2.0	1.8	1.8	1.53	1.53

Unweighted samples. Market shares in % of overnights.

Weighted market shares of distribution channels 2017: Finland

	SME hotels 2017 (n=78)		Chain hotels 2017(n=38)		Weighted average	
weighting	61.2%		38.8%			
Direct - Phone	33.1	66.9	21.5	62.2	28.6	65.1
Direct - Mail / fax	0.3		0.1		0.2	
Direct - Walk-In (persons without reservation)	4.4		3.4		4.0	
Direct - Contact form on own website (without availabilty check)	6.5		2.5		4.9	
Direct - Email	15.5		16.1		15.7	
Direct - real time booking over own website with availabilty check	7.2		18.4		11.6	
Destination Marketing Organization (DMO) / trade associations	0.7	0.7	0.2	0.2	0.5	0.5
National Tourism Organization (NTO)	0.0		0.0		0.0	
Tour operator / Travel agency	4.7	8.3	4.1	11.6	4.5	9.6
Hotel chains and cooperations with CRS	0.0		4.2		1.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		2.3		1.1	
Event and Congress organizer	3.2		1.0		2.3	
Online Booking Agency (OTA)	17.9	20.2	18.8	24.9	18.2	22.0
Globale Distributionssysteme (GDS)	1.6		5.9		3.3	
Social Media Channels	0.7		0.2		0.5	
other distribution channels	3.9	3.9	1.2	1.2	2.9	2.9

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

<u>Weighted</u> market shares of distribution channels in Finland: 2013 to 2017

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	Market share 2017 (n=116)		Market share 2015 (n=77)		Market share 2013 (n=66)		DELTA	
Direct - Phone	28.6	65.1	24.7	63.2	30.0	67.6	-1.4	-2.6
Direct - Mail / fax	0.2		0.5		1.2		-1.0	
Direct - Walk-In (persons without reservation)	4.0		4.5		5.6		-1.5	
Direct - Contact form on own website (without availabilty check)	4.9		5.5		5.2		-0.3	
Direct - Email	15.7		15.1		18.5		-2.8	
Direct - real time booking over own website with availabilty check	11.6		12.9		7.0		4.5	
Destination Marketing Organization (DMO) / trade associations	0.5	0.5	0.4	0.5	2.0	2.2	-1.5	-1.7
National Tourism Organization (NTO)	0.0		0.1		0.3		-0.2	
Tour operator / Travel agency	4.5	9.6	4.0	14.5	5.1	13.2	-0.7	-3.6
Hotel chains and cooperations with CRS	1.6		4.4		1.9		-0.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.1		3.6		3.3		-2.2	
Event and Congress organizer	2.3		2.5		2.8		-0.4	
Online Booking Agency (OTA)	18.2	22.0	16.0	20.2	12.3	15.0	**5.9**	7.0
Globale Distributionssysteme (GDS)	3.3		4.1		2.5		0.8	
Social Media Channels	0.5		0.1		0.2		0.3	
other distribution channels	2.9	2.9	1.6	1.6	2.0	2.0	0.9	0.9

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: France

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=158	Market share		confidence interval (bootstrap)	
Direct - Phone	26.3	62.8	23.6	28.7
Direct - Mail / fax	1.6		1.3	1.9
Direct - Walk-In (persons without reservation)	8.5		7.2	9.6
Direct - Contact form on own website (without availability check)	3.7		2.9	5.5
Direct - Email	10.3		8.9	12.3
Direct - real time booking over own website with availability check	12.5		10.9	13.8
Destination Marketing Organization (DMO) / trade associations	0.7	1.1	0.4	1.0
National Tourism Organization (NTO)	0.4		0.2	0.6
Tour operator / Travel agency	3.8	9.2	2.9	4.6
Hotel chains and cooperations with CRS	2.5		1.8	3.2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.1		0.7	1.5
Event and Congress organizer	1.9		1.4	2.4
Online Booking Agency (OTA)	22.4	24.7	20.2	25.1
Globale Distributionssysteme (GDS)	2.0		1.5	2.5
Social Media Channels	0.3		0.0	0.6
other distribution channels	2.2	2.2	1.7	2.7

In SME hotels, the OTA market share is 25% whereas in hotels from chains the proportion is 18.11%.

Market shares in % of overnights.

Hospitality Europe

Market shares of distribution channels 2017: Germany

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Unweighted sample: n=594	Market share		confidence interval (bootstrap)	
Direct - Phone	22.1	60.9	21.1	23.2
Direct - Mail / fax	2.4		2.1	2.6
Direct - Walk-In (persons without reservation)	4.1		3.8	4.5
Direct - Contact form on own website (without availability check)	6.7		5.9	7.5
Direct - Email	17.2		16.3	18.4
Direct - real time booking over own website with availability check	8.4		7.8	9.2
Destination Marketing Organization (DMO) / trade associations	0.6	1.0	0.3	0.9
National Tourism Organization (NTO)	0.4		0.1	0.6
Tour operator / Travel agency	3.9	7.1	3.3	4.5
Hotel chains and cooperations with CRS	1.1		0.8	1.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.8		0.5	1.1
Event and Congress organizer	1.4		1.0	1.7
Online Booking Agency (OTA)	27.7	29.7	26.4	29.1
Globale Distributionssysteme (GDS)	1.7		1.4	2.0
Social Media Channels	0.3		0.1	0.5
other distribution channels	1.3	1.3	0.9	1.7

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels in Germany: 2013 to 2017

Unweighted samples	Market share 2017 (n=594)		Market share 2015 (n=485)		Market share 2013 (n=575)		DELTA	
Direct - Phone	22.1	60.9	26.3	65.5	27.7	67.3	-5.51	-6.40
Direct - Mail / fax	2.4		3.1		4.3		-1.94	
Direct - Walk-In (persons without reservation)	4.1		5.5		4.9		-0.79	
Direct - Contact form on own website (without availabilty check)	6.7		7.8		7.2		-0.54	
Direct - Email	17.2		16.6		17.2		0.06	
Direct - real time booking over own website with availabilty check	8.4		6.3		6.1		2.32	
Destination Marketing Organization (DMO) / trade associations	0.6	1.0	1.0	1.8	0.9	1.7	-0.37	-0.79
National Tourism Organization (NTO)	0.4		0.8		0.8		-0.42	
Tour operator / Travel agency	3.9	7.1	3.4	5.7	4.4	7.6	-0.51	-0.47
Hotel chains and cooperations with CRS	1.1		0.7		0.9		0.11	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.8		0.5		0.7		0.06	
Event and Congress organizer	1.4		1.1		1.5		-0.13	
Online Booking Agency (OTA)	27.7	29.7	24.5	25.9	20.6	22.4	**7.14**	**7.38**
Globale Distributionssysteme (GDS)	1.7		1.1		1.6		0.15	
Social Media Channels	0.3		0.3		0.2		0.09	
other distribution channels	1.3	1.3	1.1	1.1	1.0	1.0	0.26	0.26

Unweighted samples. Market shares in % of overnights.

Weighted market shares of distribution channels in Germany: 2017

	SME hotels 2015 (n=431)		Chain hotels 2015 (n=607)		Weighted average	
weighting	55%		45%			
Direct - Phone	22.9	63.1	18.2	58.3	20.8	61.0
Direct - Mail / fax	2.5		1.6		2.1	
Direct - Walk-In (persons without reservation)	4.5		2.8		3.7	
Direct - Contact form on own website (without availabilty check)	8.1		1.9		5.3	
Direct - Email	17.6		18.6		18.0	
Direct - real time booking over own website with availabilty check	7.5		15.1		10.9	
Destination Marketing Organization (DMO) / trade associations	0.6	0.9	0.1	0.2	0.4	0.6
National Tourism Organization (NTO)	0.4		0.1		0.2	
Tour operator / Travel agency	3.5	4.6	1.6	7.4	2.7	5.9
Hotel chains and cooperations with CRS	0.0		0.8		0.4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		1.8		1.0	
Event and Congress organizer	0.7		3.1		1.8	
Online Booking Agency (OTA)	28.9	29.9	26.5	33.4	27.8	31.5
Globale Distributionssysteme (GDS)	0.7		6.7		3.4	
Social Media Channels	0.3		0.2		0.3	
other distribution channels	1.5	1.5	0.7	0.7	1.1	1.1

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

Weighted market shares of distribution channels in Germany: 2013 to 2017

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	Market share 2017 (n=1038)		Market share 2015 (n=994)		Market share 2013 (n=966)		DELTA (2017-2013)	
Direct - Phone	20.8	61.0	22.6	63.5	55.6	63.7	-5.5	-2.7
Direct - Mail / fax	2.1		4.4					
Direct - Walk-In (persons without reservation)	3.7		4.2					
Direct - Contact form on own website (without availabilty check)	5.3		5.3					
Direct - Email	18.0		18.1					
Direct - real time booking over own website with availabilty check	10.9		9.0		8.1		2.8	
Destination Marketing Organization (DMO) / trade associations	0.4	0.6	0.6	1.1	0.7	1.2	-0.3	-0.6
National Tourism Organization (NTO)	0.2		0.5		0.6		-0.4	
Tour operator / Travel agency	2.7	5.9	2.9	7.3	4.3	10.7	-1.6	-4.8
Hotel chains and cooperations with CRS	0.4		2.6		0.4		0.0	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.0		0.9		1.2		-0.2	
Event and Congress organizer	1.8		0.9		4.8		-3.0	
Online Booking Agency (OTA)	27.8	31.5	24.1	27.4	20.9	23.7	6.9	7.8
Globale Distributionssysteme (GDS)	3.4		3.1		2.6		0.8	
Social Media Channels	0.3		0.2		0.2		0.1	
other distribution channels	1.1	1.1	0.7	0.7	0.7	0.7	0.4	0.4

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

Market shares of distribution channels 2017: Greece

Unweighted sample: n=121	Market share 2017		confidence interval (bootstrap)	
Direct - Phone	17.6	43.2	14.9	20.6
Direct - Mail / fax	0.9		0.7	1.1
Direct - Walk-In (persons without reservation)	5.6		4.3	6.8
Direct - Contact form on own website (without availability check)	4.4		2.9	6.1
Direct - Email	8.4		7.0	10.0
Direct - real time booking over own website with availability check	6.5		4.9	8.2
Destination Marketing Organization (DMO) / trade associations	0.1	0.3	0.0	0.2
National Tourism Organization (NTO)	0.2		0.1	0.3
Tour operator / Travel agency	25.5	29.0	20.7	29.4
Hotel chains and cooperations with CRS	0.0		0.0	0.2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.1		2.5	3.8
Event and Congress organizer	0.4		0.3	0.5
Online Booking Agency (OTA)	23.6	25.4	20.0	26.8
Globale Distributionssysteme (GDS)	0.8		0.6	0.9
Social Media Channels	1.1		0.8	1.3
other distribution channels	2.0	2.0	1.7	2.3

Market shares in % of overnights.

Market shares of distribution channels in Greece: 2013 to 2017

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	Market share 2017 (n=121)		Market share 2015 (n=179)		Market share 2013 (n=266)		DELTA	
Direct - Phone	17.6	43.2	18.6	47.8	22.4	54.7	-4.80	-11.44
Direct - Mail / fax	0.9		1.3		1.6		-0.74	
Direct - Walk-In (persons without reservation)	5.6		7.9		11.0		-5.38	
Direct - Contact form on own website (without availabilty check)	4.4		4.9		4.7		-0.38	
Direct - Email	8.4		9.9		9.0		-0.61	
Direct - real time booking over own website with availabilty check	6.5		5.3		6.0		0.47	
Destination Marketing Organization (DMO) / trade associations	0.1	0.3	0.5	1.0	0.8	1.3	-0.62	-1.01
National Tourism Organization (NTO)	0.2		0.5		0.6		-0.39	
Tour operator / Travel agency	25.5	29.0	19.3	24.7	19.4	24.3	6.08	4.76
Hotel chains and cooperations with CRS	0.0		0.4		0.6		-0.55	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.1		4.4		3.9		-0.78	
Event and Congress organizer	0.4		0.7		0.4		0.01	
Online Booking Agency (OTA)	23.6	25.4	22.9	24.5	16.3	18.1	**7.26**	7.34
Globale Distributionssysteme (GDS)	0.8		0.7		0.5		0.28	
Social Media Channels	1.1		0.9		1.3		-0.20	
other distribution channels	2.0	2.0	2.0	2.0	1.5	1.5	0.55	0.55

Unweighted samples. Market shares in % of overnights.

Hospitality Europe

Market shares of distribution channels 2017: Hungary

Unweighted sample: n=118	Market share		confidence interval (bootstrap)	
Direct - Phone	9.2	41.5	7.8	11.5
Direct - Mail / fax	0.5		0.4	0.7
Direct - Walk-In (persons without reservation)	3.3		2.1	4.9
Direct - Contact form on own website (without availability check)	6.6		5.0	8.3
Direct - Email	15.9		13.5	18.1
Direct - real time booking over own website with availability check	5.9		4.9	7.2
Destination Marketing Organization (DMO) / trade associations	0.2	0.8	0.1	0.3
National Tourism Organization (NTO)	0.6		0.5	0.8
Tour operator / Travel agency	12.2	20.1	9.7	14.7
Hotel chains and cooperations with CRS	0.7		0.5	0.8
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.4		2.7	4.2
Event and Congress organizer	3.8		3.1	4.7
Online Booking Agency (OTA)	33.5	35.2	30.7	36.8
Globale Distributionssysteme (GDS)	1.2		1.0	1.5
Social Media Channels	0.5		0.4	0.6
other distribution channels	2.5	2.5	2.1	2.9

Market shares in % of overnights.

Market shares of distribution channels in Hungary: 2013 to 2017

	Market share 2017 (n=118)		Market share 2015 (n=78)		Market share 2013 (n=76)		DELTA (2017-2013)	
Direct - Phone	9.2	41.5	9.7	47.7	12.8	56.7	-3.64	-15.23
Direct - Mail / fax	0.5		0.6		2.4		-1.88	
Direct - Walk-In (persons without reservation)	3.3		3.1		3.5		-0.16	
Direct - Contact form on own website (without availabilty check)	6.6		11.7		11.9		-5.30	
Direct - Email	15.9		17.7		20.2		-4.27	
Direct - real time booking over own website with availabilty check	5.9		4.8		5.9		0.02	
Destination Marketing Organization (DMO) / trade associations	0.2	0.8	0.1	0.2	0.8	1.5	-0.60	-0.63
National Tourism Organization (NTO)	0.6		0.1		0.7		-0.03	
Tour operator / Travel agency	12.2	20.1	11.6	22.4	9.3	19.2	2.89	0.83
Hotel chains and cooperations with CRS	0.7		0.7		1.0		-0.31	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.4		5.5		4.6		-1.19	
Event and Congress organizer	3.8		4.5		4.4		-0.56	
Online Booking Agency (OTA)	33.5	35.2	25.8	26.9	19.1	21.4	**14.40**	13.76
Globale Distributionssysteme (GDS)	1.2		0.6		1.9		-0.69	
Social Media Channels	0.5		0.6		0.4		0.05	
other distribution channels	2.5	2.5	2.9	2.9	1.2	1.2	1.26	1.26

Unweighted samples. Market shares in % of overnights.

<u>Weighted</u> market shares of distribution channels in Hungary: 2017

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	SME hotels 2017 (n=72)		Chain hotels 2017 (n=58)		Weighted average	
weighting	67%		33%			
Direct - Phone	11.6	50.3	4.3	20.9	9.2	40.6
Direct - Mail / fax	0.5		0.4		0.5	
Direct - Walk-In (persons without reservation)	4.8		0.7		3.4	
Direct - Contact form on own website (without availabilty chec	7.6		3.4		6.2	
Direct - Email	19.1		8.2		15.5	
Direct - real time booking over own website with availabilty che	6.8		3.9		5.8	
Destination Marketing Organization (DMO) / trade associations	0.3	1.3	0.0	0.0	0.2	0.9
National Tourism Organization (NTO)	1.0		0.0		0.7	
Tour operator / Travel agency	6.9	13.7	27.5	34.8	13.7	20.6
Hotel chains and cooperations with CRS	0.0		1.8		0.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	3.1		2.5		2.9	
Event and Congress organizer	3.6		3.0		3.4	
Online Booking Agency (OTA)	30.4	32.2	36.0	37.0	32.3	33.8
Globale Distributionssysteme (GDS)	1.3		0.8		1.1	
Social Media Channels	0.6		0.2		0.4	
other distribution channels	2.5	2.5	7.2	7.2	4.1	4.1

Market shares in % of overnights.

Hotrec Hospitality Europe

<u>Weighted</u> market shares of distribution channels in Hungary: 2013 to 2017

	Market share 2017 (n=130)		Market share 2015 (n=98)		Market share 2013 (n=75)		DELTA	
Direct - Phone	9.2	40.6	9.0	47.8	13.0	57.3	-3.8	-16.7
Direct - Mail / fax	0.5		0.4		2.5		-2.0	
Direct - Walk-In (persons without reservation)	3.4		3.0		3.5		-0.1	
Direct - Contact form on own website (without availabilty check)	6.2		12.0		12.0		-5.9	
Direct - Email	15.5		18.5		20.4		-4.9	
Direct - real time booking over own website with availabilty check	5.8		4.9		5.9		-0.0	
Destination Marketing Organization (DMO) / trade associations	0.2	0.9	0.1	0.2	0.8	1.5	-0.6	-0.6
National Tourism Organization (NTO)	0.7		0.1		0.7		0.0	
Tour operator / Travel agency	13.7	20.6	15.4	27.8	9.1	18.8	**4.6**	1.8
Hotel chains and cooperations with CRS	0.6		1.4		0.9		-0.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.9		4.0		4.5		-1.6	
Event and Congress organizer	3.4		6.9		4.3		-0.9	
Online Booking Agency (OTA)	32.3	33.8	21.3	22.4	19.0	21.3	**13.3**	12.5
Globale Distributionssysteme (GDS)	1.1		0.5		1.9		-0.8	
Social Media Channels	0.4		0.6		0.4		0.0	
other distribution channels	4.1	4.1	1.7	1.7	1.2	1.2	2.9	2.9

Market shares in % of overnights.

Market shares of distribution channels 2017: Italy

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Unweighted sample	Market share 2017 (n=344)		confidence interval (bootstrap)		Market share 2017 (without South Tyrol, n=230)	
Direct - Phone	18.1	64.1	16.5	19.7	21.0	60.0
Direct - Mail / fax	1.4		1.1	1.7	1.2	
Direct - Walk-In (persons without reservation)	4.3		3.7	5.0	4.8	
Direct - Contact form on own website (without availability check)	10.2		9.0	11.4	6.5	
Direct - Email	24.7		23.1	26.4	20.8	
Direct - real time booking over own website with availability check	5.5		4.7	6.3	5.8	
Destination Marketing Organization (DMO) / trade associations	1.9	2.9	1.5	2.2	1.4	2.1
National Tourism Organization (NTO)	1.0		0.7	1.3	0.8	
Tour operator / Travel agency	8.1	10.1	7.1	9.1	9.2	12.0
Hotel chains and cooperations with CRS	0.2		0.0	0.4	0.2	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		0.8	1.6	1.7	
Event and Congress organizer	0.6		0.3	0.9	0.9	
Online Booking Agency (OTA)	20.3	21.4	18.4	22.2	22.9	24.4
Globale Distributionssysteme (GDS)	0.3		0.1	0.5	0.5	
Social Media Channels	0.9		0.6	1.2	1.0	
other distribution channels	1.5	1.5	1.1	1.9	1.4	1.4

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels in Italy: 2015 to 2017

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

	Market share 2017 (n=344)		Market share 2015 (n=260)		DELTA (2017-2015)	
Direct - Phone	18.1	64.1	20.4	59.3	-2.32	4.71
Direct - Mail / fax	1.4		2.0		-0.66	
Direct - Walk-In (persons without reservation)	4.3		5.1		-0.79	
Direct - Contact form on own website (without availabilty check)	10.2		7.3		2.88	
Direct - Email	24.7		18.6		6.10	
Direct - real time booking over own website with availabilty check	5.5		6.0		-0.50	
Destination Marketing Organization (DMO) / trade associations	1.9	2.9	0.6	1.4	1.27	1.45
National Tourism Organization (NTO)	1.0		0.8		0.18	
Tour operator / Travel agency	8.1	10.1	9.8	15.4	-1.63	-5.22
Hotel chains and cooperations with CRS	0.2		0.9		-0.68	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		2.9		-1.72	
Event and Congress organizer	0.6		1.8		-1.19	
Online Booking Agency (OTA)	20.3	21.4	20.5	22.6	**-0.22**	-1.17
Globale Distributionssysteme (GDS)	0.3		1.6		-1.23	
Social Media Channels	0.9		0.6		0.28	
other distribution channels	1.5	1.5	1.3	1.3	0.20	0.20

Unweighted samples. Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Netherlands

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=147	Market share		confidence interval (bootstrap)	
Direct - Phone	12.4	45.9	11.1	14.0
Direct - Mail / fax	6.0		4.3	8.1
Direct - Walk-In (persons without reservation)	2.7		2.3	3.2
Direct - Contact form on own website (without availability check)	2.6		2.1	3.3
Direct - Email	11.7		10.1	13.7
Direct - real time booking over own website with availability check	10.5		9.1	11.9
Destination Marketing Organization (DMO) / trade associations	0.5	0.5	0.4	0.5
National Tourism Organization (NTO)	0.1		0.0	0.2
Tour operator / Travel agency	3.2	5.3	2.7	3.8
Hotel chains and cooperations with CRS	0.4		0.3	0.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.9		0.7	1.1
Event and Congress organizer	0.9		0.7	1.1
Online Booking Agency (OTA)	44.8	47.2	41.9	47.5
Globale Distributionssysteme (GDS)	1.8		1.5	2.2
Social Media Channels	0.6		0.5	0.8
other distribution channels	1.1	1.1	0.9	1.3

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Norway

Unweighted sample: n=53	Market share		confidence interval (bootstrap)	
Direct - Phone	23.4	55.6	18.9	27.3
Direct - Mail / fax	1.4		1.1	1.8
Direct - Walk-In (persons without reservation)	2.9		2.3	3.7
Direct - Contact form on own website (without availability check)	4.3		3.3	5.3
Direct - Email	13.3		9.6	16.9
Direct - real time booking over own website with availability check	10.3		8.1	12.5
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.5	0.8
National Tourism Organization (NTO)	0.0		0.0	0.0
Tour operator / Travel agency	12.1	14.7	8.5	16.4
Hotel chains and cooperations with CRS	0.3		0.2	0.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.3		1.0	1.6
Event and Congress organizer	0.9		0.7	1.1
Online Booking Agency (OTA)	21.2	27.7	17.2	25.8
Globale Distributionssysteme (GDS)	6.4		4.9	8.0
Social Media Channels	0.1		0.1	0.2
other distribution channels	1.4	1.4	1.1	1.7

Market shares in % of overnights.

Market shares of distribution channels in Norway: 2013 to 2017

	Market share 2017 (n=53)		Market share 2015 (n=102)		Market share 2013 (n=55)		DELTA	
Direct - Phone	23.4	55.6	14.3	38.8	24.9	68.3	-1.53	-12.71
Direct - Mail / fax	1.4		2.4		5.4		-4.01	
Direct - Walk-In (persons without reservation)	2.9		2.9		3.8		-0.88	
Direct - Contact form on own website (without availabilty check)	4.3		2.8		2.6		1.67	
Direct - Email	13.3		14.9		22.9		-9.64	
Direct - real time booking over own website with availabilty check	10.3		1.6		8.6		1.68	
Destination Marketing Organization (DMO) / trade associations	0.6	0.7	0.2	0.3	0.5	0.7	0.13	-0.07
National Tourism Organization (NTO)	0.0		0.1		0.2		-0.20	
Tour operator / Travel agency	12.1	14.7	3.8	36.3	4.2	12.4	7.97	2.32
Hotel chains and cooperations with CRS	0.3		17.6		3.8		-3.48	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.3		1.4		0.8		0.56	
Event and Congress organizer	0.9		13.4		3.7		-2.73	
Online Booking Agency (OTA)	21.2	27.7	12.4	24.6	9.1	18.6	**12.02**	9.10
Globale Distributionssysteme (GDS)	6.4		12.1		8.6		-2.21	
Social Media Channels	0.1		0.1		0.8		-0.71	
other distribution channels	1.4	1.4	0.0	0.0	0.0	0.0	1.34	1.34

Unweighted samples. In 2015 there were only 5 SME hotels in the sample. Market shares in % of overnights.

Weighted market shares of distribution channels 2017: Norway

	SME hotels 2017 (n=26)		Chain hotels 2017 (n=120)		Weighted average	
weighting	20.5%		79.5%			
Direct - Phone	17.9	55.6	10.2	58.2	11.8	57.6
Direct - Mail / fax	2.4		1.6		1.8	
Direct - Walk-In (persons without reservation)	5.2		2.2		2.8	
Direct - Contact form on own website (without availabilty check)	5.6		8.6		8.0	
Direct - Email	19.9		20.1		20.0	
Direct - real time booking over own website with availabilty check	4.7		15.5		13.2	
Destination Marketing Organization (DMO) / trade associations	0.1	0.2	0.3	0.3	0.3	0.3
National Tourism Organization (NTO)	0.1		0.0		0.0	
Tour operator / Travel agency	18.4	19.5	11.2	14.7	12.7	15.7
Hotel chains and cooperations with CRS	0.0		0.2		0.1	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		1.3		1.1	
Event and Congress organizer	0.7		2.0		1.8	
Online Booking Agency (OTA)	24.6	24.8	13.5	25.5	15.8	25.4
Globale Distributionssysteme (GDS)	0.0		12.0		9.5	
Social Media Channels	0.2		0.0		0.1	
other distribution channels	0.0	0.0	1.3	1.3	1.0	1.0

Market shares in % of overnights.

<u>Weighted</u> market shares of distribution channels in Norway: 2013 to 2017

	Market share 2017 (n=146)		Market share 2015 (n=185)		Market share 2013 (n=55)		DELTA (2017-2013)	
Direct - Phone	11.8	57.6	17.1	52.2	24.9	68.9	-13.1	-11.3
Direct - Mail / fax	1.8		4.6		5.4		-3.6	
Direct - Walk-In (persons without reservation)	2.8		2.3		4.3		-1.5	
Direct - Contact form on own website (without availabilty check)	8.0		4.5		2.9		5.1	
Direct - Email	20.0		17.8		23.2		-3.1	
Direct - real time booking over own website with availabilty check	13.2		5.9		8.2		5.0	
Destination Marketing Organization (DMO) / trade associations	0.3	0.3	0.1	0.1	0.6	0.8	-0.3	-0.5
National Tourism Organization (NTO)	0.0		0.0		0.2		-0.2	
Tour operator / Travel agency	12.7	15.7	2.0	21.6	4.4	12.5	8.3	3.1
Hotel chains and cooperations with CRS	0.1		9.1		3.5		-3.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.1		3.3		0.7		0.4	
Event and Congress organizer	1.8		7.2		4.0		-2.2	
Online Booking Agency (OTA)	15.8	25.4	15.5	26.1	8.9	17.7	6.9	7.6
Globale Distributionssysteme (GDS)	9.5		10.6		7.8		1.7	
Social Media Channels	0.1		0.0		1.0		-0.9	
other distribution channels	1.0	1.0	0.0	0.0	0.0	0.0	1.0	1.0

Unweighted samples. In 2015 there were only 5 SME hotels in the sample. Market shares in % of overnights.

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Market shares of distribution channels 2017: Spain

Unweighted sample: n=156	Market share		confidence interval (bootstrap)	
Direct - Phone	7.9	32.1	6.6	9.3
Direct - Mail / fax	1.3		1.1	1.5
Direct - Walk-In (persons without reservation)	3.2		2.6	3.9
Direct - Contact form on own website (without availability check)	3.3		2.8	3.9
Direct - Email	6.4		5.4	7.5
Direct - real time booking over own website with availability check	9.9		8.5	11.3
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	1.1	1.5
National Tourism Organization (NTO)	0.1		0.1	0.1
Tour operator / Travel agency	15.3	30.4	12.3	17.9
Hotel chains and cooperations with CRS	2.2		1.8	2.6
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	7.8		6.8	9.0
Event and Congress organizer	5.1		4.0	6.2
Online Booking Agency (OTA)	30.8	35.1	27.9	33.1
Globale Distributionssysteme (GDS)	4.2		3.4	5.2
Social Media Channels	0.2		0.0	0.4
other distribution channels	1.1	1.1	0.8	1.4

Market shares in % of overnights.

Market shares of distribution channels in Spain: 2013 to 2017

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Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	Market share 2017 (n=156)		Market share 2015 (n=132)		Market share 2013 (n=153)		DELTA (2017-2013)	
Direct - Phone	7.9	32.1	10.5	37.2	16.7	43.6	-8.82	-11.58
Direct - Mail / fax	1.3		1.8		2.7		-1.36	
Direct - Walk-In (persons without reservation)	3.2		3.7		6.1		-2.88	
Direct - Contact form on own website (without availabilty check)	3.3		2.6		3.3		0.00	
Direct - Email	6.4		8.4		6.5		-0.07	
Direct - real time booking over own website with availabilty check	9.9		10.2		8.3		1.55	
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	1.1	1.3	0.3	0.4	1.01	0.95
National Tourism Organization (NTO)	0.1		0.1		0.1		-0.06	
Tour operator / Travel agency	15.3	30.4	12.7	28.4	16.0	30.2	-0.71	0.18
Hotel chains and cooperations with CRS	2.2		2.6		3.6		-1.41	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	7.8		9.0		8.6		-0.79	
Event and Congress organizer	5.1		4.0		2.0		3.09	
Online Booking Agency (OTA)	30.8	35.1	27.6	31.5	21.7	24.0	**9.10**	11.09
Globale Distributionssysteme (GDS)	4.2		3.6		1.9		2.30	
Social Media Channels	0.2		0.3		0.5		-0.31	
other distribution channels	1.1	1.1	1.7	1.7	1.8	1.8	-0.66	-0.66

Unweighted samples. Market shares in % of overnights.

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Market shares of distribution channels 2017: Sweden

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=140	Market share		confidence interval (bootstrap)	
Direct - Phone	21.6	53.7	19.5	24.1
Direct - Mail / fax	0.2		0.2	0.2
Direct - Walk-In (persons without reservation)	3.2		2.7	3.8
Direct - Contact form on own website (without availability check)	3.4		2.9	4.1
Direct - Email	17.6		15.7	19.5
Direct - real time booking over own website with availability check	7.7		6.2	9.0
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	1.1	1.5
National Tourism Organization (NTO)	0.1		0.1	0.2
Tour operator / Travel agency	5.3	10.5	4.0	7.0
Hotel chains and cooperations with CRS	3.1		2.6	3.7
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		0.3	0.4
Event and Congress organizer	1.8		1.5	2.1
Online Booking Agency (OTA)	29.6	33.7	26.5	32.7
Globale Distributionssysteme (GDS)	3.4		2.6	4.5
Social Media Channels	0.7		0.5	0.9
other distribution channels	0.7	0.7	0.5	0.9

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

Hotrec Hospitality Europe

Market shares of distribution channels in Sweden: 2015 to 2017

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	Market share 2017 (n=140)		Market share 2015 (n=74)		Market share 2013 (n=17!)		DELTA (2017-2015)	
Direct - Phone	21.6	53.7	15.5	39.5	34.1	74.7	6.18	14.22
Direct - Mail / fax	0.2		1.5		1.2		-1.32	
Direct - Walk-In (persons without reservation)	3.2		3.4		4.5		-0.17	
Direct - Contact form on own website (without availabilty check)	3.4		3.1		6.9		0.39	
Direct - Email	17.6		16.1		22.2		1.51	
Direct - real time booking over own website with availabilty check	7.7		0.1		5.8		7.63	
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	0.0	0.1	2.2	3.5	1.29	1.37
National Tourism Organization (NTO)	0.1		0.1		1.4		0.08	
Tour operator / Travel agency	5.3	10.5	4.4	39.6	4.1	4.4	0.83	-29.09
Hotel chains and cooperations with CRS	3.1		24.2		0.1		-21.10	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		0.9		0.0		-0.49	
Event and Congress organizer	1.8		10.1		0.2		-8.33	
Online Booking Agency (OTA)	29.6	33.7	8.8	20.9	11.8	13.6	20.79	12.81
Globale Distributionssysteme (GDS)	3.4		12.1		1.5		-8.65	
Social Media Channels	0.7		0.0		0.3		0.67	
other distribution channels	0.7	0.7	0.0	0.0	3.8	3.8	0.69	0.69

Observations for 2013 not sufficient. Unweighted sample.
Market shares in % of overnights.

Hotrec Hospitality Europe

Weighted market shares of distribution channels 2017: Sweden

	SME hotels 2017 (n=94)		Chain hotels 2017 (n=125)		Weighted average	
weighting	56%		44%			
Direct - Phone	21.9	55.1	9.7	54.4	16.5	54.8
Direct - Mail / fax	0.1		0.4		0.2	
Direct - Walk-In (persons without reservation)	3.1		4.0		3.5	
Direct - Contact form on own website (without availabilty check)	3.9		3.1		3.5	
Direct - Email	17.4		21.1		19.0	
Direct - real time booking over own website with availabilty check	8.6		16.3		12.0	
Destination Marketing Organization (DMO) / trade associations	1.3	1.4	0.3	0.3	0.8	0.9
National Tourism Organization (NTO)	0.1		0.0		0.1	
Tour operator / Travel agency	5.6	8.3	9.3	13.4	7.2	10.5
Hotel chains and cooperations with CRS	1.0		1.6		1.3	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.2		0.6		0.4	
Event and Congress organizer	1.5		1.8		1.6	
Online Booking Agency (OTA)	31.6	34.6	15.9	30.7	24.7	32.9
Globale Distributionssysteme (GDS)	2.4		14.7		7.8	
Social Media Channels	0.7		0.1		0.5	
other distribution channels	0.7	0.7	1.2	1.2	0.9	0.9

Market shares in % of overnights.

Weighted market shares of distribution channels in Sweden: 2013 to 2017

	Market share 2017 (n=219)		Market share 2015 (n=157)		Market share 2013 (n=17)		DELTA (2017-2015)	
Direct - Phone	16.5	54.8	18.3	43.9	33.8	72.5	-1.8	10.9
Direct - Mail / fax	0.2		0.8		1.8		-0.5	
Direct - Walk-In (persons without reservation)	3.5		3.3		3.7		0.2	
Direct - Contact form on own website (without availabilty check)	3.5		3.0		4.8		0.5	
Direct - Email	19.0		11.1		22.7		7.9	
Direct - real time booking over own website with availabilty check	12.0		7.3		5.6		4.7	
Destination Marketing Organization (DMO) / trade associations	0.8	0.9	0.0	0.7	2.5	4.2	0.8	0.2
National Tourism Organization (NTO)	0.1		0.7		1.7		-0.7	
Tour operator / Travel agency	7.2	10.5	19.5	31.4	5.7	6.0	-12.3	-20.9
Hotel chains and cooperations with CRS	1.3		8.1		0.1		-6.9	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.4		1.5		0.0		-1.2	
Event and Congress organizer	1.6		2.2		0.2		-0.6	
Online Booking Agency (OTA)	24.7	32.9	18.6	23.9	11.2	12.4	6.1	9.0
Globale Distributionssysteme (GDS)	7.8		5.4		1.0		2.4	
Social Media Channels	0.5		0.0		0.2		0.5	
other distribution channels	0.9	0.9	0.0	0.0	4.9	4.9	0.9	0.9

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

Market shares of distribution channels 2017: Switzerland

Unweighted sample: n=252	Market share		confidence interval	
Direct - Phone	18.3		16.7	20.0
Direct - Mail / fax	1.7		1.2	2.2
Direct - Walk-In (persons without reservation)	5.1		4.5	5.7
Direct - Contact form on own website (without availability check)	6.9	59.2	5.9	8.5
Direct - Email	18.9		17.3	20.5
Direct - real time booking over own website with availability check	8.2		7.1	9.4
associations	1.4	2.5	1.2	1.7
National Tourism Organization (NTO)	1.1		0.9	1.3
Tour operator / Travel agency	3.8		2.9	4.6
Hotel chains and cooperations with CRS	0.6		0.3	0.9
Transhotel, etc.)	0.7	6.4	0.3	1.1
Event and Congress organizer	1.3		0.9	1.7
Online Booking Agency (OTA)	27.7		25.7	30.1
Globale Distributionssysteme (GDS)	1.1	29.0	0.8	1.4
Social Media Channels	0.2		0.0	0.5
other distribution channels	2.9	2.9	2.5	3.3

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

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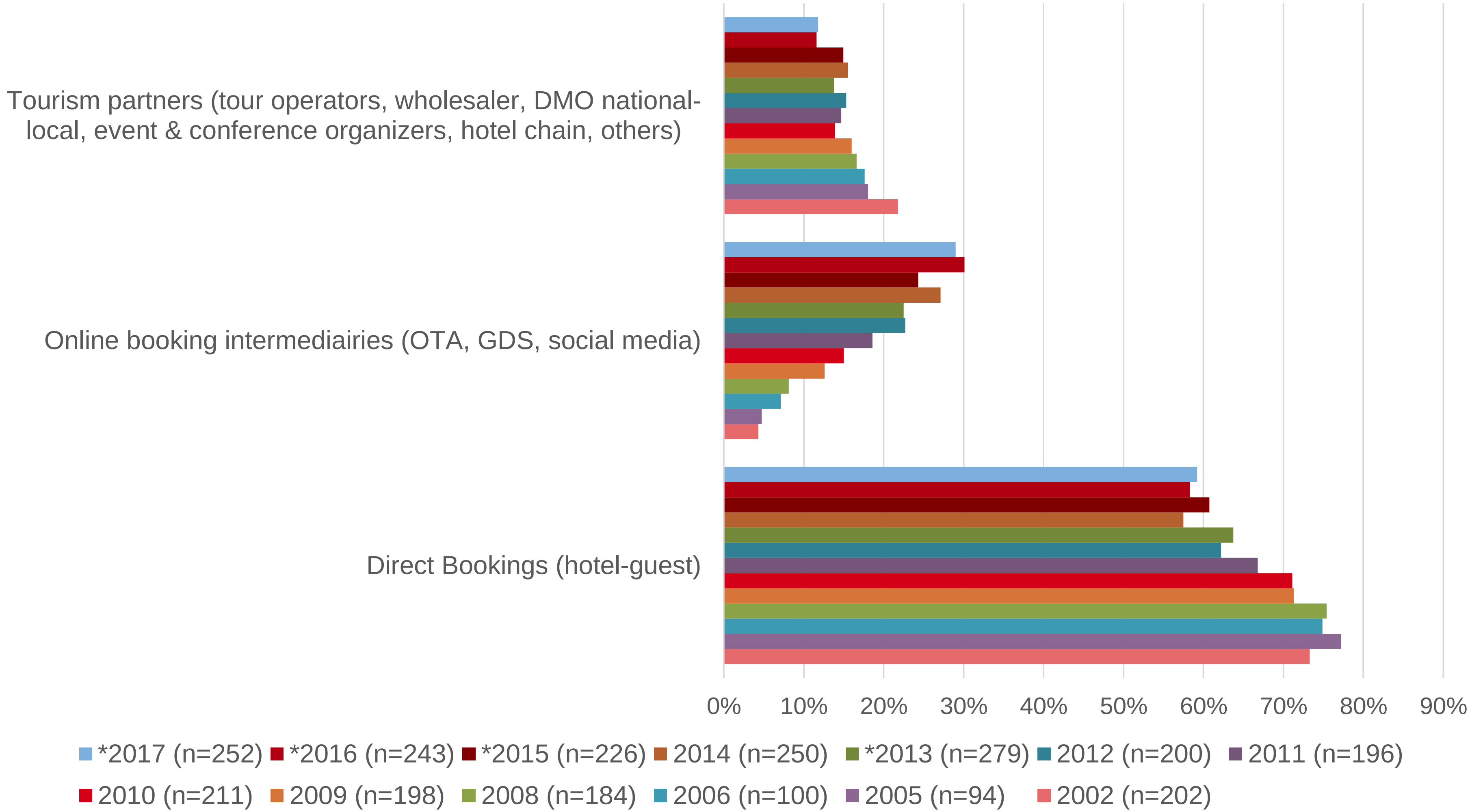
Market shares of distribution channels in Switzerland: 2013 to 2017

	Market share 2017 (n=252)		Market share 2015 (n=329)		Market share 2013 (n=279)		DELTA	
Direct - Phone	18.3	59.2	19.9	60.7	20.6	63.7	-2.30	-4.57
Direct - Mail / fax	1.7		2.0		2.2		-0.53	
Direct - Walk-In (persons without reservation)	5.1		4.7		5.9		-0.75	
Direct - Contact form on own website (without availabilty check)	6.9		5.0		6.4		0.54	
Direct - Email	18.9		21.6		21.2		-2.27	
Direct - real time booking over own website with availabilty check	8.2		7.5		7.5		0.74	
Destination Marketing Organization (DMO) / trade associations	1.4	2.5	1.4	2.1	1.4	2.5	0.08	0.04
National Tourism Organization (NTO)	1.1		0.7		1.1		-0.04	
Tour operator / Travel agency	3.8	6.4	4.6	10.3	4.6	10.0	-0.77	-3.64
Hotel chains and cooperations with CRS	0.6		1.1		1.3		-0.68	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.7		2.3		2.7		-1.96	
Event and Congress organizer	1.3		2.3		1.5		-0.23	
Online Booking Agency (OTA)	27.7	29.0	20.6	24.3	19.4	22.5	**8.31**	6.53
Globale Distributionssysteme (GDS)	1.1		3.4		2.8		-1.72	
Social Media Channels	0.2		0.4		0.3		-0.06	
other distribution channels	2.9	2.9	2.5	2.5	1.3	1.3	1.65	1.65

Unweighted samples. Market shares in % of overnights.

Distribution Trends in the Swiss Hotel Sector 2002-2017

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 2002-2017

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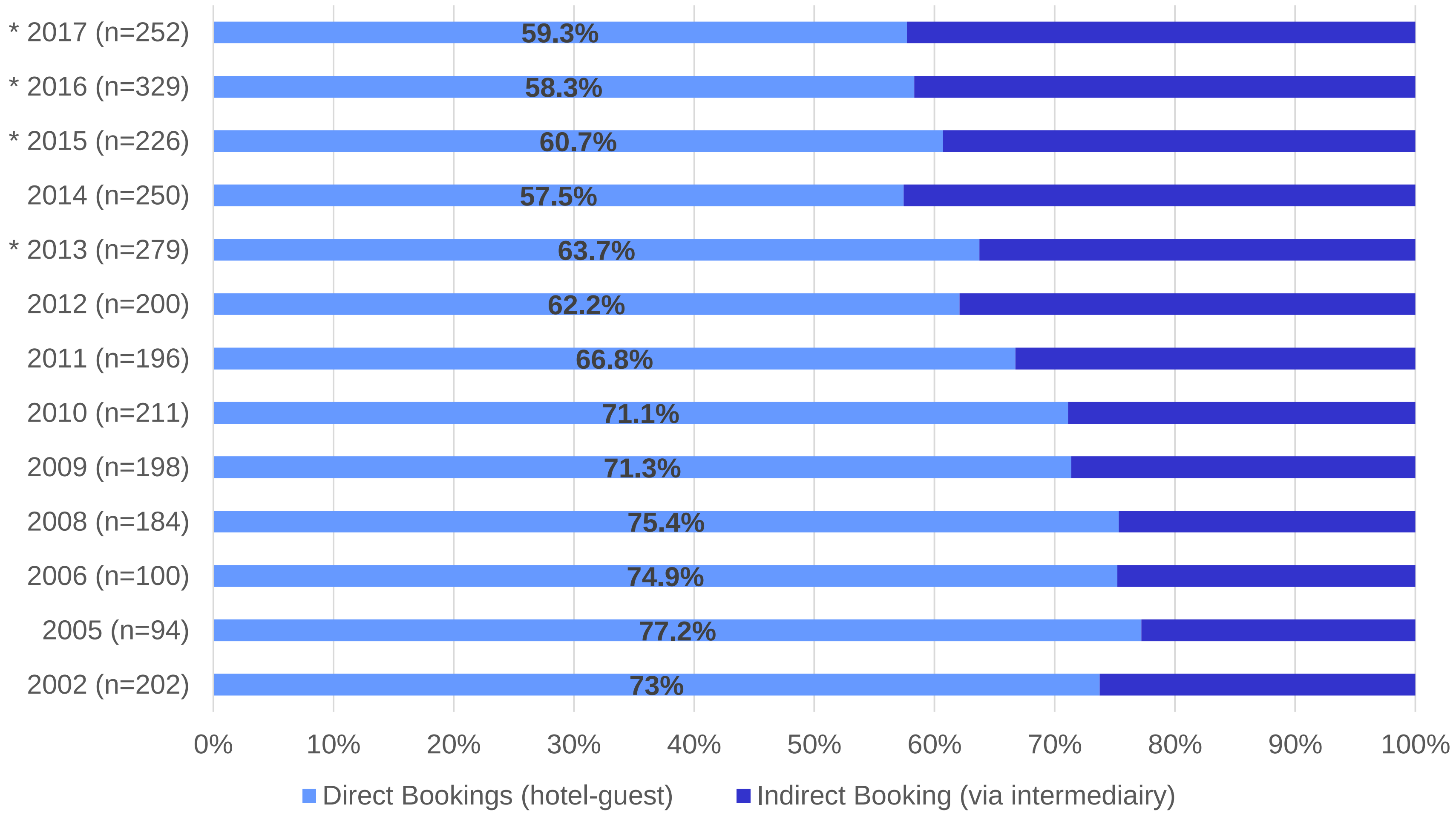
Hochschule für Wirtschaft & Tourismus



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

Distribution channels for selected countries with 20-50 valid responses

- Austria
- Belgium
- Croatia
- Denmark
- Ireland
- Latvia
- Poland
- Turkey
- United Kingdom

➢ **The following results have to be taken with care as the number of observations is not really sufficient for a reliable analysis! Results are indicative.**

Market shares of distribution channels 2017: Austria

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=32	Market share		confidence interval (bootstrap)	
Direct - Phone	19.3	63.4	14.6	24.7
Direct - Mail / fax	1.2		0.9	1.6
Direct - Walk-In (persons without reservation)	3.3		2.3	4.3
Direct - Contact form on own website (without availability check)	9.1		6.1	12.6
Direct - Email	22.0		16.6	26.8
Direct - real time booking over own website with availability check	8.6		6.4	10.9
Destination Marketing Organization (DMO) / trade associations	1.2	1.4	0.8	1.6
National Tourism Organization (NTO)	0.3		0.2	0.4
Tour operator / Travel agency	5.3	10.5	3.1	7.9
Hotel chains and cooperations with CRS	0.5		3.8	7.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.4		1.7	3.2
Event and Congress organizer	2.3		1.6	3.0
Online Booking Agency (OTA)	21.8	23.4	16.7	28.3
Globale Distributionssysteme (GDS)	1.4		1.0	1.8
Social Media Channels	0.1		0.0	0.3
other distribution channels	1.3	1.3	1.0	1.6

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Belgium

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Unweighted sample: n=40	Market share		confidence interval (bootstrap)	
Direct - Phone	11.3	62.4	8.2	14.4
Direct - Mail / fax	8.2			
Direct - Walk-In (persons without reservation)	3.4		2.4	4.3
Direct - Contact form on own website (without availability check)	8.5		4.6	12.2
Direct - Email	18.5		13.4	24.6
Direct - real time booking over own website with availability check	12.5		9.0	16.8
Destination Marketing Organization (DMO) / trade associations	0.3	0.8	0.2	0.4
National Tourism Organization (NTO)	0.5		0.4	0.7
Tour operator / Travel agency	0.6	3.8	0.4	0.8
Hotel chains and cooperations with CRS	0.3		0.2	0.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.9		1.3	2.5
Event and Congress organizer	1.0		0.7	1.3
Online Booking Agency (OTA)	30.3	31.9	24.6	35.8
Globale Distributionssysteme (GDS)	1.3		0.9	1.7
Social Media Channels	0.4		0.3	0.5
other distribution channels	1.1	1.1	0.8	1.4

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Croatia

Unweighted sample: n=32	Market share		confidence interval (bootstrap)	
Direct - Phone	21.1	51.3	13.6	28.6
Direct - Mail / fax	6.7		4.0	9.6
Direct - Walk-In (persons without reservation)	3.3		2.3	4.2
Direct - Contact form on own website (without availability check)	2.4		1.1	4.1
Direct - Email	13.4		10.2	16.7
Direct - real time booking over own website with availability check	4.4		2.9	6.1
Destination Marketing Organization (DMO) / trade associations	0.3	0.9	0.2	0.3
National Tourism Organization (NTO)	0.6		0.4	0.9
Tour operator / Travel agency	21.7	25.4	14.7	30.3
Hotel chains and cooperations with CRS	0.5		14.1	30.1
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		0.3	0.7
Event and Congress organizer	2.0		0.8	1.7
Online Booking Agency (OTA)	19.5	20.8	13.5	25.7
Globale Distributionssysteme (GDS)	1.2		0.8	1.6
Social Media Channels	0.2		0.1	0.3
other distribution channels	1.7	1.7	1.4	2.0

Market shares in % of overnights.

Market shares of distribution channels 2017: Denmark

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=31	Market share		confidence interval (bootstrap)	
Direct - Phone	14.6	49.9	10.4	19.4
Direct - Mail / fax	3.0		2.1	3.9
Direct - Walk-In (persons without reservation)	2.7		2.1	3.5
Direct - Contact form on own website (without availability check)	3.0		2.1	3.9
Direct - Email	14.7		11.0	18.7
Direct - real time booking over own website with availability check	11.9		7.3	15.7
Destination Marketing Organization (DMO) / trade associations	0.5	0.7	0.3	0.6
National Tourism Organization (NTO)	0.3		0.2	0.4
Tour operator / Travel agency	8.9	15.5	5.7	12.2
Hotel chains and cooperations with CRS	2.2		1.5	2.9
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.2		0.9	1.6
Event and Congress organizer	3.1		2.2	4.1
Online Booking Agency (OTA)	25.8	32.3	20.8	30.8
Globale Distributionssysteme (GDS)	5.9		3.6	8.6
Social Media Channels	0.6		0.4	0.8
other distribution channels	1.5	1.5	1.2	1.8

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: Ireland

Unweighted sample: n=28	Market share		confidence interval (bootstrap)	
Direct - Phone	20.4	54.1	16.0	24.5
Direct - Mail / fax	1.5		1.0	2.0
Direct - Walk-In (persons without reservation)	5.5		3.3	8.2
Direct - Contact form on own website (without availability check)	3.3		2.1	4.7
Direct - Email	10.2		7.1	13.6
Direct - real time booking over own website with availability check	13.1		10.1	16.1
Destination Marketing Organization (DMO) / trade associations	0.3	0.6	0.2	0.3
National Tourism Organization (NTO)	0.4		0.2	0.5
Tour operator / Travel agency	7.3	14.0	4.6	9.7
Hotel chains and cooperations with CRS	0.1		0.0	0.1
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.2		2.4	6.2
Event and Congress organizer	2.5		1.7	3.3
Online Booking Agency (OTA)	26.7	31.2	22.1	32.1
Globale Distributionssysteme (GDS)	3.4		2.3	4.5
Social Media Channels	1.1		0.8	1.5
other distribution channels	0.2	0.2	0.0	0.4

Market shares in % of overnights.

Market shares of distribution channels 2017: Latvia

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=37	Market share		confidence interval (bootstrap)	
Direct - Phone	11.0	32.6	7.3	14.1
Direct - Mail / fax	1.9		1.3	2.4
Direct - Walk-In (persons without reservation)	5.4		3.9	7.7
Direct - Contact form on own website (without availability check)	3.1		2.2	4.1
Direct - Email	6.9		5.1	8.9
Direct - real time booking over own website with availability check	4.3		2.6	5.9
Destination Marketing Organization (DMO) / trade associations	0.9	1.8	0.6	1.2
National Tourism Organization (NTO)	0.9		0.6	1.2
Tour operator / Travel agency	12.3	27.5	9.4	15.4
Hotel chains and cooperations with CRS	0.4		0.3	0.5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	12.6		8.8	17.0
Event and Congress organizer	2.2		1.6	2.9
Online Booking Agency (OTA)	33.7	34.9	25.9	41.0
Globale Distributionssysteme (GDS)	0.5		0.4	0.7
Social Media Channels	0.7		0.5	0.9
other distribution channels	3.2	3.2	2.8	3.6

Market shares in % of overnights.

Market shares of distribution channels 2017: Poland

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=30	Market share		confidence interval (bootstrap)	
Direct - Phone	20.2	50.0	17.0	24.6
Direct - Mail / fax	0.3		0.2	0.4
Direct - Walk-In (persons without reservation)	5.1		3.7	6.7
Direct - Contact form on own website (without availability check)	2.3		1.6	3.2
Direct - Email	17.7		13.2	22.3
Direct - real time booking over own website with availability check	4.4		2.9	6.0
Destination Marketing Organization (DMO) / trade associations	0.2	0.3	0.1	0.2
National Tourism Organization (NTO)	0.1		0.1	0.2
Tour operator / Travel agency	8.0	18.4	3.2	14.5
Hotel chains and cooperations with CRS	0.7		0.5	1.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		1.1	2.2
Event and Congress organizer	8.1		4.7	11.6
Online Booking Agency (OTA)	26.4	30.6	20.9	31.1
Globale Distributionssysteme (GDS)	3.2		2.2	4.4
Social Media Channels	0.9		0.6	1.3
other distribution channels	0.7	0.7	0.4	1.0

Market shares in % of overnights.

Hospitality Europe

Market shares of distribution channels 2017: Turkey

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Hochschule für Wirtschaft & Tourismus

Unweighted sample: n=40	Market share		confidence interval (bootstrap)	
Direct - Phone	15.8	50.1	12.1	20.2
Direct - Mail / fax	5.8		4.3	7.0
Direct - Walk-In (persons without reservation)	7.0		5.6	8.4
Direct - Contact form on own website (without availability check)	2.9		2.2	3.5
Direct - Email	14.9		11.3	19.2
Direct - real time booking over own website with availability check	3.9		3.0	4.8
Destination Marketing Organization (DMO) / trade associations	2.3	3.0	1.7	2.8
National Tourism Organization (NTO)	0.7		0.5	0.8
Tour operator / Travel agency	15.4	28.5	9.8	14.5
Hotel chains and cooperations with CRS	1.8		1.3	2.2
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	5.6		4.3	7.0
Event and Congress organizer	5.8		3.9	7.6
Online Booking Agency (OTA)	14.8	17.4	11.2	17.8
Globale Distributionssysteme (GDS)	2.2		1.6	2.6
Social Media Channels	0.5		0.4	0.6
other distribution channels	1.0	1.0	0.7	1.3

Market shares in % of overnights.

Hotrec Hospitality Europe

Market shares of distribution channels 2017: United Kingdom

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Unweighted sample: n=20	Market share		confidence interval (bootstrap)	
Direct - Phone	12.7	46.4	6.9	20.2
Direct - Mail / fax	2.8		1.8	4.1
Direct - Walk-In (persons without reservation)	3.1		1.7	5.0
Direct - Contact form on own website (without availability check)	5.2		3.3	7.5
Direct - Email	7.3		4.6	11.1
Direct - real time booking over own website with availability check	15.4		11.5	19.1
Destination Marketing Organization (DMO) / trade associations	1.6	1.7	1.0	2.2
National Tourism Organization (NTO)	0.2		0.1	0.2
Tour operator / Travel agency	4.1	10.2	2.6	5.9
Hotel chains and cooperations with CRS	3.2		2.0	4.6
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.7		1.7	3.8
Event and Congress organizer	0.3		0.2	0.4
Online Booking Agency (OTA)	37.9	41.8	29.5	48.5
Globale Distributionssysteme (GDS)	3.5		2.3	5.1
Social Media Channels	0.5		0.3	0.7
other distribution channels	0.0	0.0	0.0	0.4

Market shares in % of overnights.

Hotrec Hospitality Europe

Analysis of direct booking market shares

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

Direct booking shares for countries

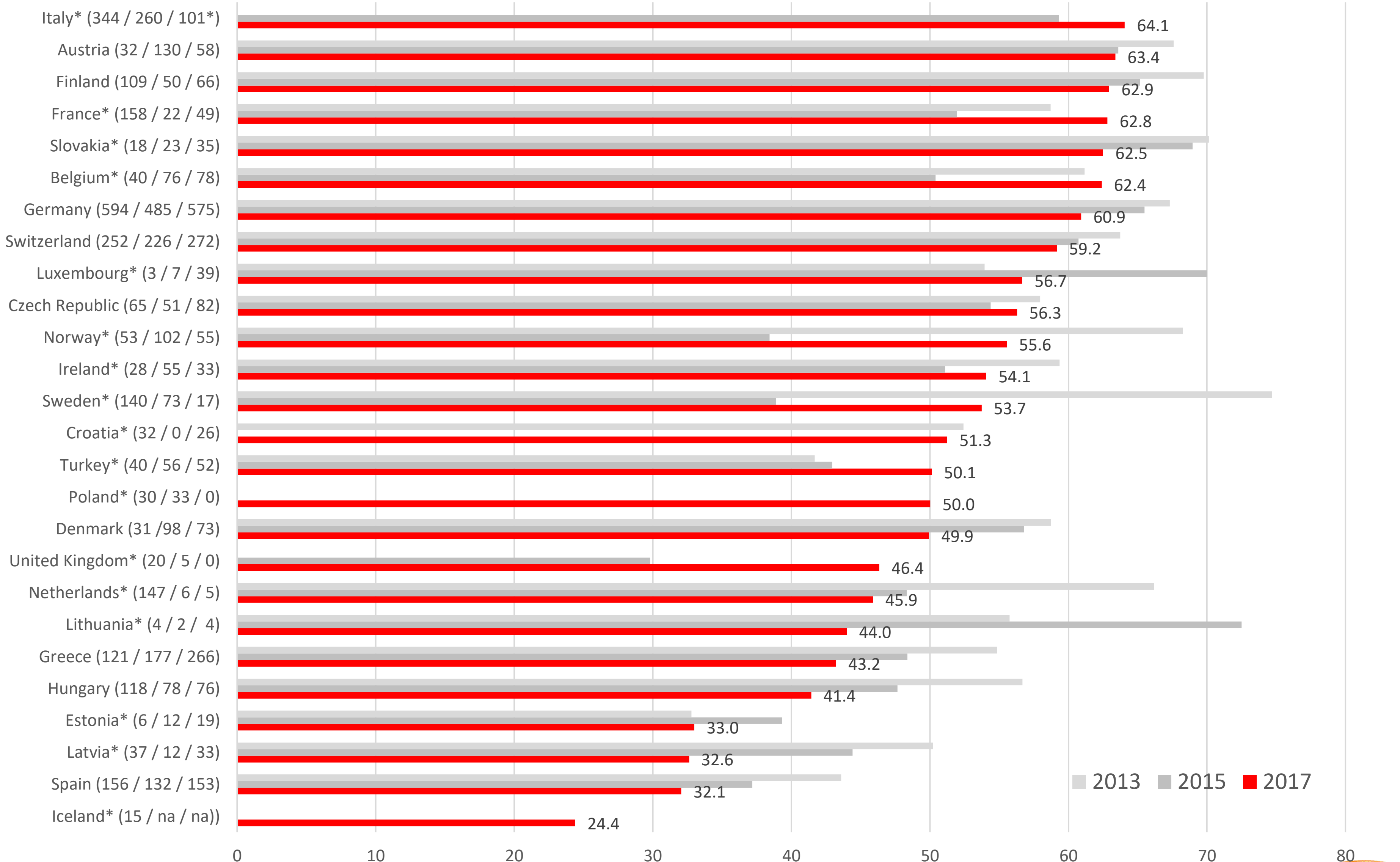
Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	2017	2015	2013	Trend (2013-2017)
Iceland* (15 / na / na))	24.4			na
Spain (156 / 132 / 153)	32.05	37.18	43.6	decreasing
Latvia* (37 / 12 / 33)	32.62	44.42	50.24	na
Estonia* (6 / 12 / 19)	33	39.33	32.79	na
Hungary (118 / 78 / 76)	41.44	47.65	56.68	decreasing
Greece (121 / 177 / 266)	43.23	48.37	54.86	decreasing
Lithuania* (4 / 2 / 4)	44	72.5	55.75	na
Netherlands* (147 / 6 / 5)	45.9	48.33	66.2	na
United Kingdom* (20 / 5 / 0)	46.35	29.8		na
Denmark (31 /98 / 73)	49.94	56.8	58.73	decreasing
Poland* (30 / 33 / 0)	50.03			na
Turkey* (40 / 56 / 52)	50.13	42.95	41.69	na
Croatia* (32 / 0 / 26)	51.25		52.42	na
Sweden* (140 / 73 / 17)	53.73	38.9	74.71	na
Ireland* (28 / 55 / 33)	54.07	51.09	59.36	na
Norway* (53 / 102 / 55)	55.55	38.43	68.25	na
Czech Republic (65 / 51 / 82)	56.29	54.39	57.95	decreasing
Luxembourg* (3 / 7 / 39)	56.67	70	53.95	na
Switzerland (252 / 226 / 272)	59.16	60.72	63.74	decreasing
Germany (594 / 485 / 575)	60.91	65.49	67.31	decreasing
Belgium* (40 / 76 / 78)	62.4	50.41	61.17	na
Slovakia* (18 / 23 / 35)	62.5	68.96	70.14	na
France* (158 / 22 / 49)	62.81	51.95	58.71	na
Finland (109 / 50 / 66)	62.94	65.18	69.77	decreasing
Austria (32 / 130 / 58)	63.38	63.6	67.6	decreasing
Italy* (344 / 260 / 101*)	64.06	59.33		na

Number of observations in brackets for 2017, 2015 and 2013 respectively. * indicate countries where nbe of observations are problematic or where we have problems with a bias in sample. Problem values marked in gray.

Hotrec Hospitality Europe

Direct booking shares for countries



Number of observations in brackets for 2017, 2015 and 2013 respectively. * indicate countries where nbe of observations are problematic or where we have problems with a bias in sample.

Direct booking shares by segment 2017 (overall sample Europe)

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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***		
	53.9%	65%	36.3%	54.0%	**55.1%**		
Star category	1*	2*	3*	4*	5*	other category	***Total***
	60.4%	60%	56%	48%	46%	59%	**53.6%**
Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	62%	59%	51%	44%	**54.9%**		
Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	58%	53%	59.6%	65%	**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***		
	39%	53%	59%	63%	**55.3%**		
Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	58%	44%	59%	**55.0%**			

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

Hotrec Hospitality Europe

Analysis of OTA market shares

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

OTA market shares 2013 to 2017 for selected countries

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	2017	2015	2013	Trend 2013-2017
Turkey* (40 / 56/ 52)	14.8	17.3	12.1	na
Norway (146 / 185 / 55)	17.6	15.5	9.1	increasing
Finland (116 / 77 / 66)	18.3	16.0	11.1	increasing
Italy* (344 / 260 / 101*)	20.3	20.5		stable
Austria* (32 / 130 / 58)	21.8	21.2	15.4	increasing
France* (158 / 22 / 49)	22.4	28.1	24.8	na
Greece (121 / 179 / 266)	23.6	22.9	16.3	increasing
Sweden* (219 / 157 / 17)	24.7	18.6	11.8	increasing
Czech Republic (65 / 52 / 82)	25.6	23.7	18.1	increasing
Denmark* (31 / 120 / 73)	25.8	20.9	22.8	increasing
Poland* (30 / 33 / 0)	26.4	22.7		increasing
Ireland* (28 / 55 / 33)	26.7	25.7	15.3	increasing
Switzerland (252 / 226 / 272)	27.7	20.6	19.4	increasing
Germany (1038 / 994 / 966)	27.8	24.1	20.9	increasing
Belgium* (40 / 76 / 78)	30.4	36.7	27.9	na
Spain (156 / 132 / 153)	30.8	27.6	21.7	increasing
Hungary (130 / 78 / 76)	32.9	25.8	19.1	increasing

in %

Number of observations in brackets for 2017, 2015 and 2013 respectively. * indicate countries where nbe of observations are problematic or where we have problems with a bias in sample.

Hospitality Europe

OTA market shares 2013 to 2017 for selected countries

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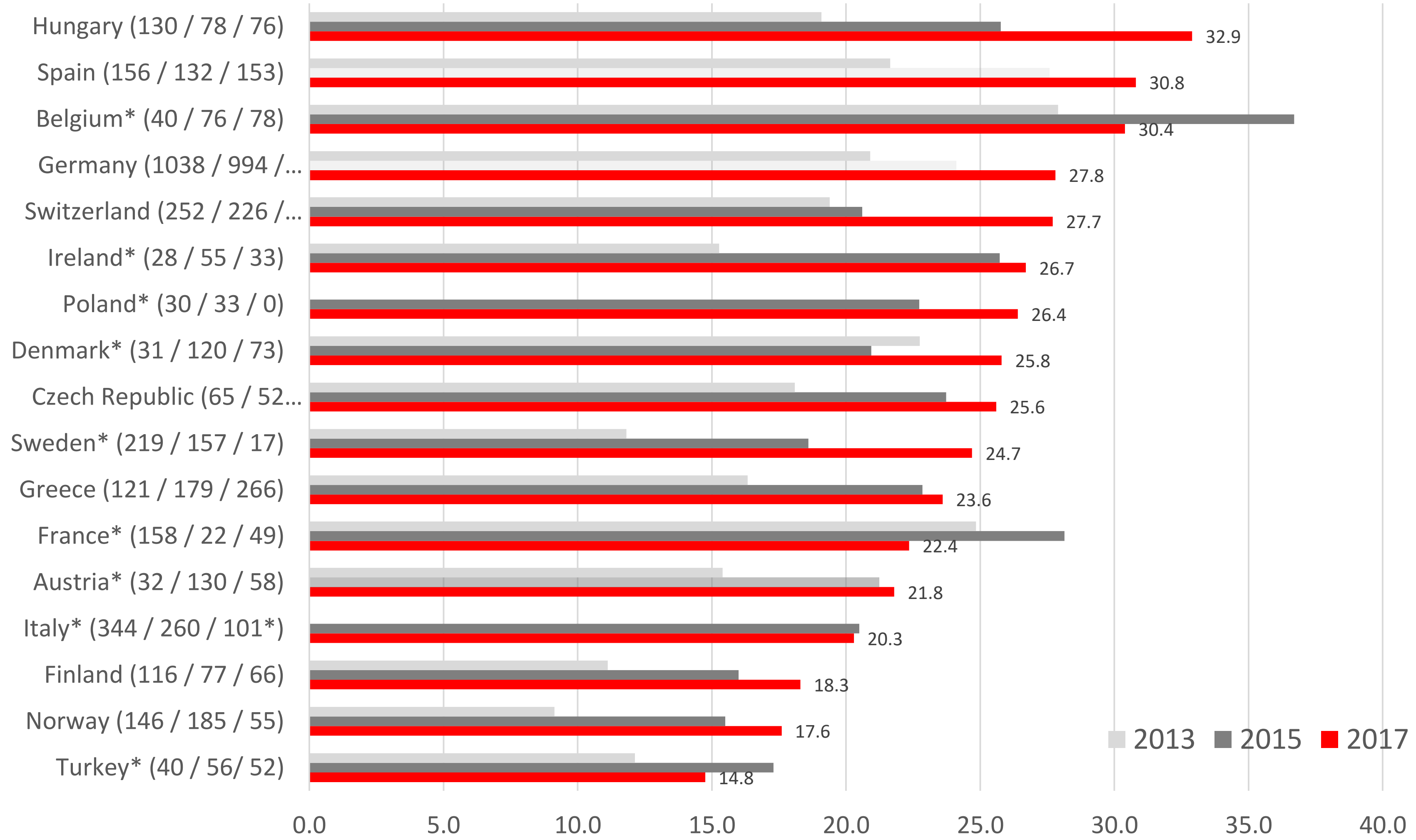


Number of observations in brackets for 2017, 2015 and 2013 respectively. * indicate countries where nbe of observations are problematic or where we have problems with a bias in sample.

Hotrec Hospitality Europe

OTA market shares by segment 2017 (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***
	28.7%	20.1%	45.7%	20.8%	***27.0%***

Star category	1*	2*	3*	4*	5*	other category	***Total***
	25.5%	26.2%	28.7%	26.5%	18.8%	26.5%	***27.0%***

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***
	29.3%	27.5%	27.5%	23.5%	***27.1%***

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***
	26.3%	28.1%	16.8%	18.8%	***26.7%***

Location of hotel	City with more than 250'000 inhabitants	City between 50'000 and 250'000 inhabitants	City between 10'000 and 50'000 inhabitants	small city (less than 10'000 inhabitants)	***Total***
	36.4%	29.0%	25.2%	22.1%	***26.9%***

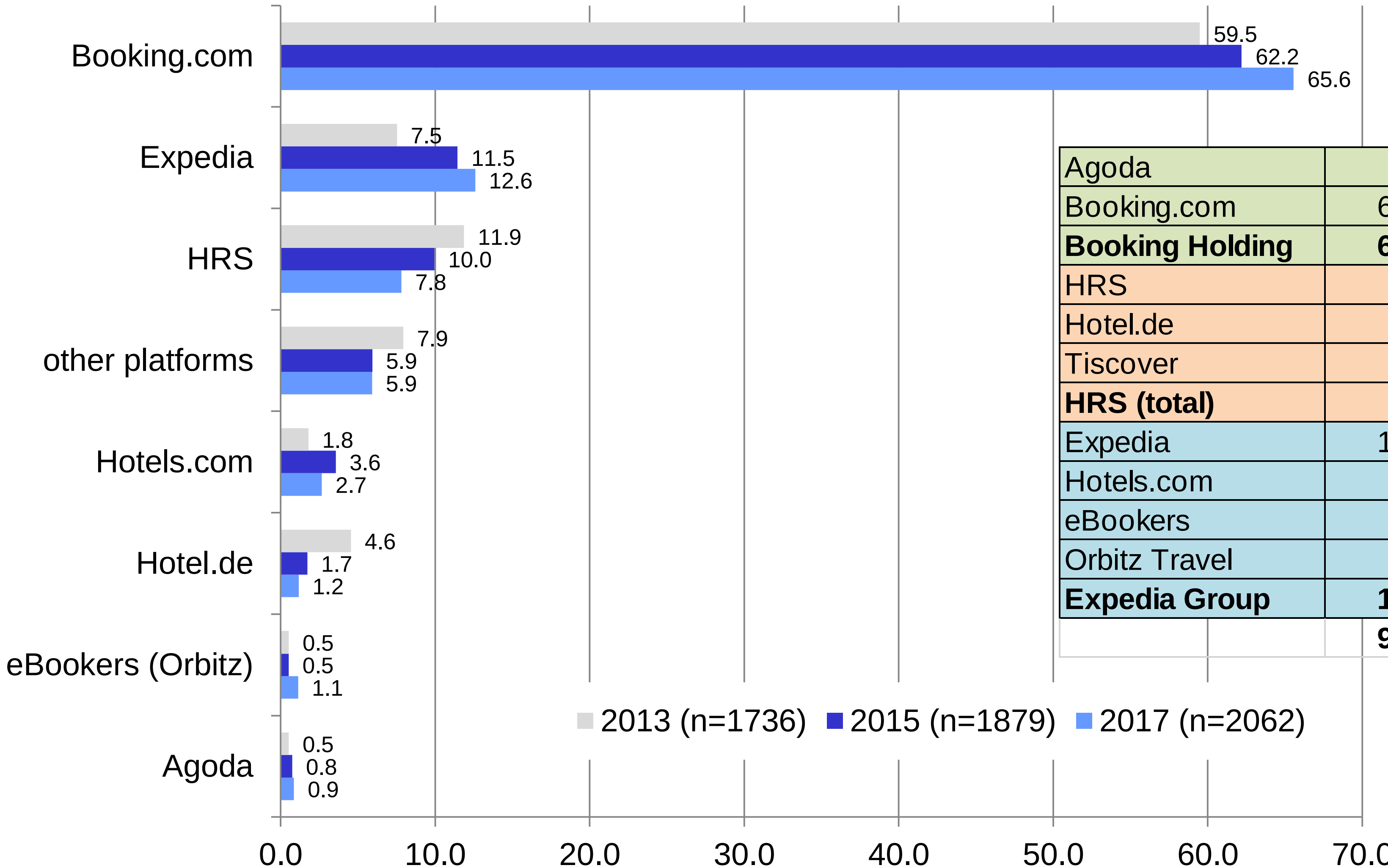
Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***
	27.9%	26.2%	22.5%	***27.0%***

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

Hospitality Europe

OTAs in Europe

Unweighted relative market shares of major OTAs in Europe



Agoda	0.86
Booking.com	65.55
Booking Holding	**66.41**
HRS	7.82
Hotel.de	1.17
Tiscover	0.04
HRS (total)	**9.03**
Expedia	12.59
Hotels.com	2.66
eBookers	1.13
Orbitz Travel	0.25
Expedia Group	**16.63**
	92.07

Hotrec Hospitality Europe

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

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Hochschule für Wirtschaft & Tourismus

	Czech Republic 2013	Czech Republic 2015	Czech Republic 2017	Finland 2013	Finland 2015	Finland 2017	*Finland 2017 (weighted)*	France 2017	Germany 2013	Germany 2015	Germany 2017	*Germany 2017 (weighted)*	Greece 2013	Greece 2015	Greece 2017	Hungary 2013	Hungary 2015	Hungary 2017	*Hungary 2017 (weighted)*	overall sample 2013	overall sample 2015	overall sample 2017
observations (n)	*55*	*40*	*70*	*42*	*39*	*80*	*87*	*121*	*597*	*395*	*483*	*535*	*163*	*141*	*68*	*68*	*73*	*101*	*113*	*1736*	*1870*	*2062*
Agoda	0.3	0.3	0.7	0.0	0.1	1.6	1.4	0.4	0.2	0.3	0.4	0.5	0.5	0.9	0.8	2.1	1.7	1.8	1.6	0.5	0.8	0.9
Booking.com	65.0	60.6	70.0	64.6	63.7	66.2	64.6	68.2	41.8	51.5	58.9	58.6	73.3	73.6	72.2	55.7	56.0	63.6	63.2	59.5	62.2	65.6
Booking Holding	**65.2**	**60.9**	**70.7**	**64.6**	**63.8**	**67.8**	**66.0**	**68.6**	**42.0**	**51.9**	**59.3**	**59.1**	**73.8**	**74.5**	**72.9**	**57.8**	**57.7**	**65.4**	**64.8**	**60.0**	**62.9**	**66.4**
HRS	8.6	10.8	6.7	1.9	0.9	1.5	1.8	3.7	32.4	31.0	22.6	19.9	0.5	0.8	1.0	6.1	5.4	5.3	5.4	11.9	10.0	7.8
Hotel.de	5.0	2.6	0.8	0.6	0.4	0.4	0.4	0.3	11.0	5.3	3.3	3.6	0.7	0.4	0.3	2.5	0.5	0.4	0.5	4.6	1.7	1.2
Tiscover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.0
HRS (total)	**13.5**	**13.3**	**7.5**	**2.5**	**1.3**	**1.9**	**2.2**	**4.0**	**43.6**	**36.4**	**26.0**	**23.6**	**1.2**	**1.2**	**1.4**	**8.6**	**6.0**	**5.8**	**5.9**	**16.6**	**11.9**	**9.0**
Expedia	8.3	8.6	6.0	2.5	6.8	10.9	14.7	16.7	3.3	4.2	7.1	10.5	8.8	15.0	15.9	8.3	13.4	8.2	9.1	7.5	11.5	12.6
Venere	3.5	0.5		0.5	0.1				1.0	0.4			3.7	0.9		1.6	0.3			2.4	0.8	
Hotels.com	1.5	1.6	2.1	2.2	7.4	6.2	5.4	4.2	1.3	1.2	1.0	0.8	2.8	2.9	3.6	1.1	1.6	2.1	1.5	1.8	3.6	2.7
eBookers	0.1	0.2	0.2	0.5	5.0	3.2	2.8	2.0	0.2	0.1	0.9	0.8	0.2	0.1	1.7	0.5	0.7	0.8	0.5	1.1	0.5	1.1
Orbitz Travel	0.5	0.3	0.2	0.5	0.5	0.1	0.1	0.3	0.1	0.1	0.1	0.1	0.1	0.1	0.6	0.4	0.7	0.4	0.4	1.7	0.5	0.3
Expedia Group (tota	**13.7**	**11.2**	**8.5**	**6.2**	**19.8**	**20.4**	**23.0**	**23.2**	**6.0**	**5.9**	**9.1**	**12.2**	**15.6**	**19.0**	**21.9**	**11.9**	**16.8**	**11.4**	**11.5**	**14.5**	**16.8**	**16.6**
Total of top 3	***92.5***	***85.4***	***86.8***	***73.3***	***84.9***	***90.0***	***91.2***	***95.8***	***91.6***	***94.1***	***94.4***	***94.9***	***90.6***	***94.7***	***96.2***	***78.2***	***80.5***	***82.6***	***82.2***	***91.1***	***91.7***	***92.1***

Based on mostly unweighted sample data from countries with more than 70 observations from online survey 2017.

Hotrec Hospitality Europe

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

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

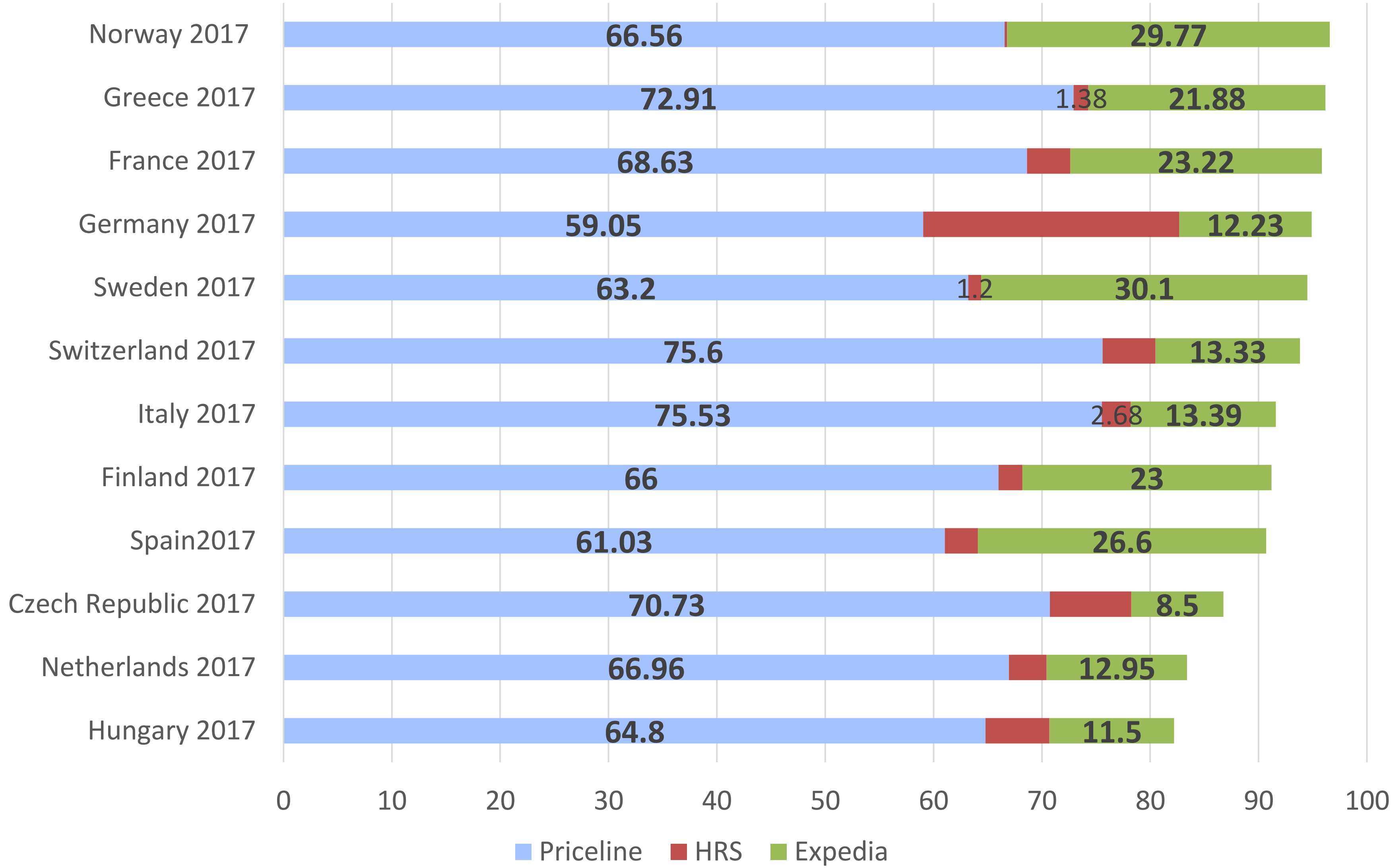
	Italy 2015	Italy 2017	Netherlands 2017	Norway 2013	Norway 2015	Norway 2017	*Norway 2017 (weighted)*	Spain 2013	Spain 2015	Spain2017	Switzerland 2013	Switzerland 2015	Switzerland 2017	Sweden 2017	*Sweden 2017 (weighted)*	overall sample 2013	overall sample 2015	overall sample 2017
observations (n)	*232*	*285*	*133*	*41*	*101*	*44*	*121*	*127*	*118*	*135*	*247*	*202*	*186*	*111*	*190*	*1736*	*1870*	*2062*
Agoda	0.8	0.5	1.1	0.2	0.1	0.1	0.0	1.4	2.6	2.8	0.4	0.9	1.0	0.2	0.1	0.5	0.8	0.9
Booking.com	67.1	75.1	65.8	72.7	63.1	63.3	66.5	66.2	54.9	58.2	69.7	70.3	74.6	61.9	63.1	59.5	62.2	65.6
Booking Holding	**67.9**	**75.5**	**67.0**	**72.9**	**63.2**	**63.5**	**66.6**	**67.6**	**57.5**	**61.0**	**70.1**	**71.3**	**75.6**	**62.1**	**63.2**	**60.0**	**62.9**	**66.4**
HRS	3.3	2.1	2.9	2.3	2.8	0.6	0.2	2.0	2.6	2.5	6.7	7.0	4.4	2.0	1.1	11.9	10.0	7.8
Hotel.de	1.0	0.5	0.6	1.4	0.1	0.1	0.0	1.5	0.9	0.6	3.0	1.5	0.5	0.2	0.1	4.6	1.7	1.2
Tiscover	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.2	0.2	0.0
HRS (total)	**4.3**	**2.7**	**3.5**	**3.7**	**2.8**	**0.7**	**0.2**	**3.5**	**3.5**	**3.1**	**9.8**	**8.6**	**4.9**	**2.1**	**1.2**	**16.6**	**11.9**	**9.0**
Expedia	14.3	11.1	10.4	8.5	11.2	27.9	26.5	10.9	20.0	22.3	6.3	10.8	11.3	18.9	22.8	7.5	11.5	12.6
Venere	2.4			0.4	0.0			3.9	1.0		2.6	0.9				2.4	0.8	
Hotels.com	1.6	1.6	1.1	5.7	21.0	3.8	2.3	1.1	1.5	2.9	1.0	1.5	1.7	10.2	6.8	1.8	3.6	2.7
eBookers	0.3	0.6	1.2	0.1	0.2	1.6	0.9	0.6	1.0	0.7	1.3	0.5	0.3	1.2	0.4	1.1	0.5	1.1
Orbitz Travel	0.3	0.1	0.3	0.7	1.1	0.1	0.0	1.3	1.3	0.7	0.3	0.5	0.1	0.2	0.1	1.7	0.5	0.3
Expedia Group (to	**19.0**	**13.4**	**13.0**	**15.3**	**33.6**	**33.4**	**29.8**	**17.9**	**24.8**	**26.6**	**11.5**	**14.2**	**13.3**	**30.5**	**30.1**	**14.5**	**16.8**	**16.6**
Total of top 3	***91.2***	***91.6***	***83.4***	***91.9***	***99.6***	***97.5***	***96.6***	***89.0***	***85.8***	***90.7***	***91.4***	***94.1***	***93.8***	***94.6***	***94.5***	***91.1***	***91.7***	***92.1***

Based on unweighted sample data from countries with more than 70 observations from survey 2017.

Hotrec Hospitality Europe

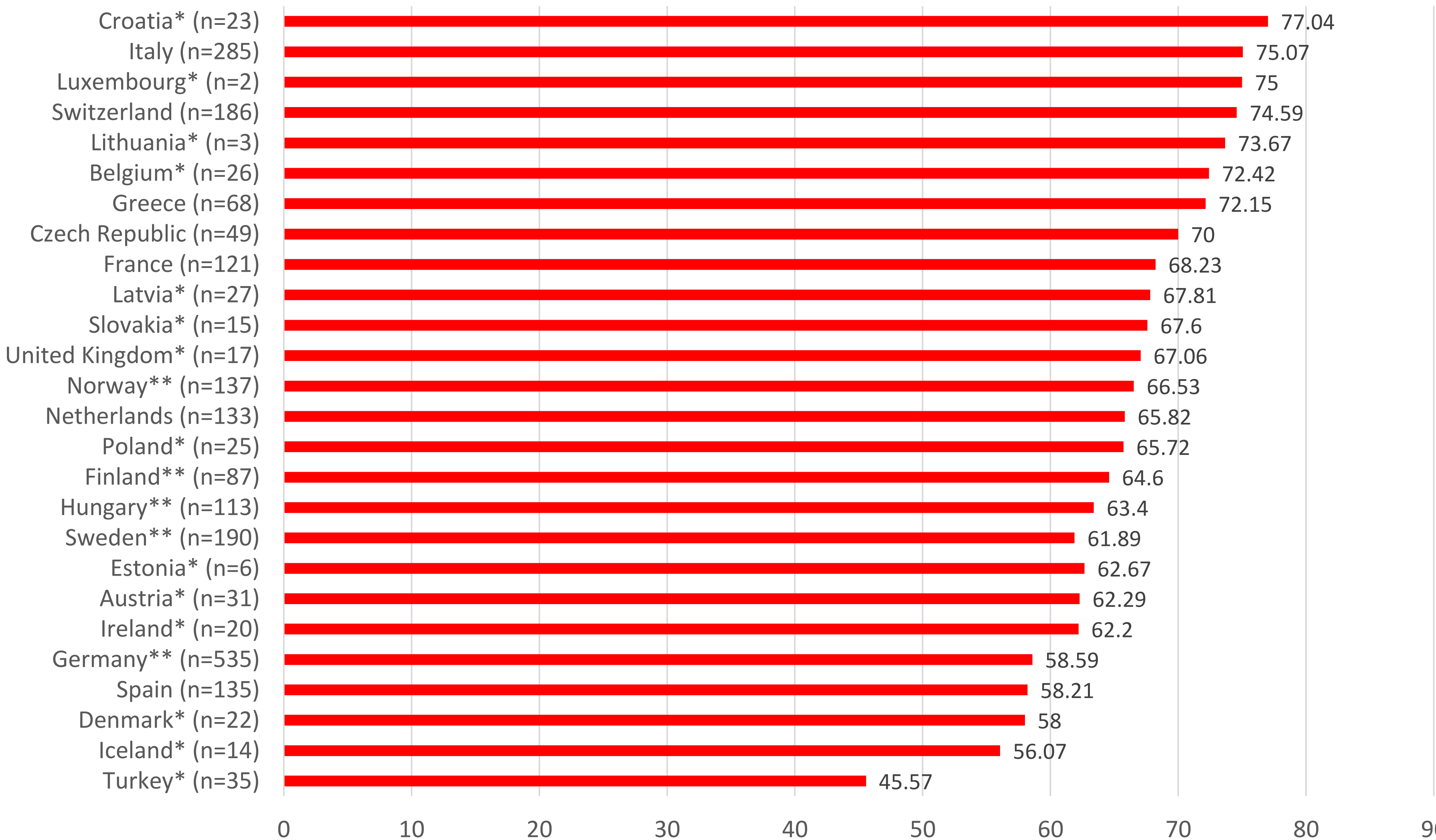
Relative market shares of top 3 OTAs in selected countries

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



Hotrec Hospitality Europe

Relative market shares (in %) of Booking Holding by country 2017



Unweighted sample. Number of observations in brackets for 2017. * indicate countries where nbe of observations are problematic. ** Data from hotel chains integrated.

Relative market shares of Booking Holding by hotel segment 2017

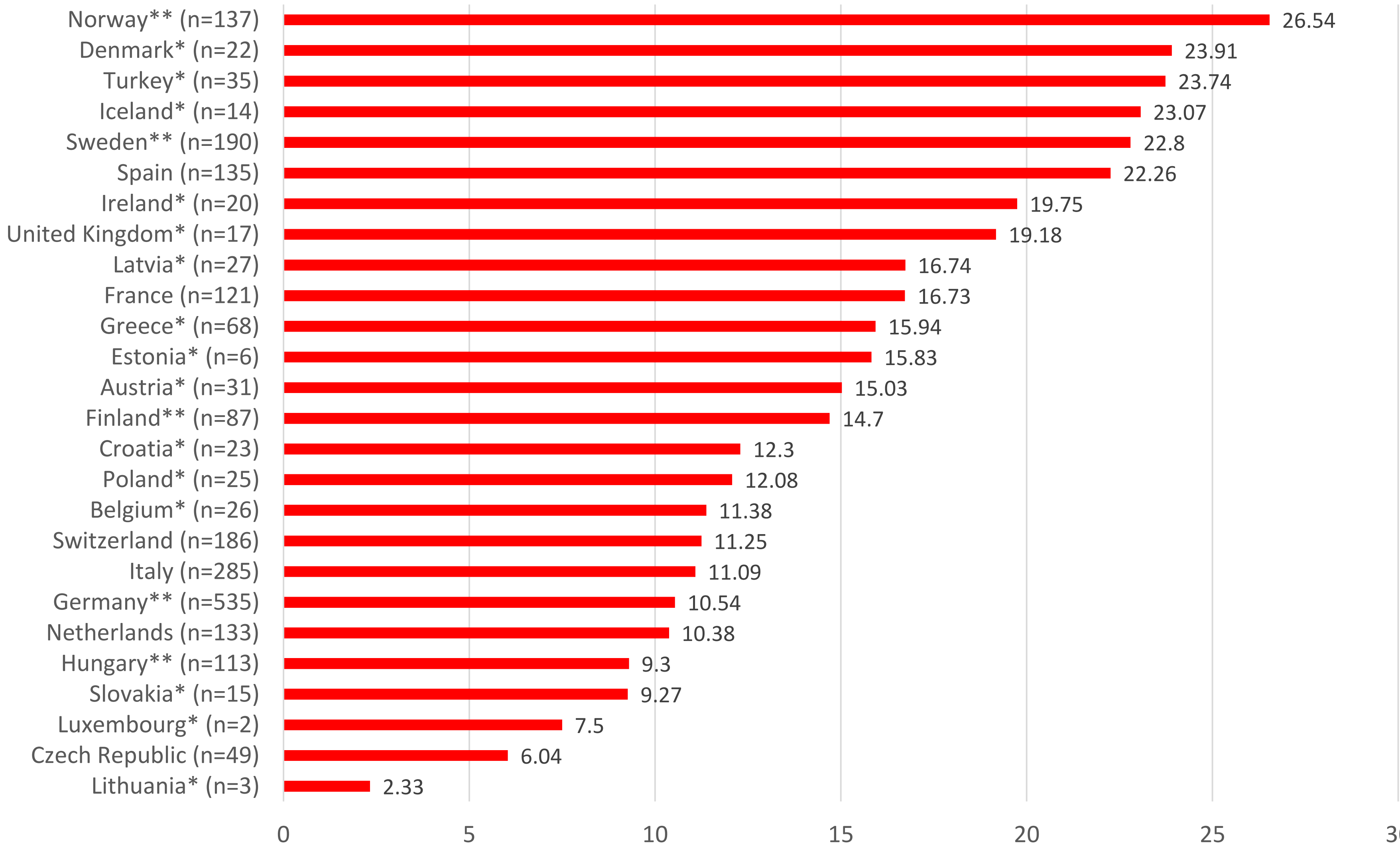
Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***		
	63%	77%	87%	77%	***65.6%***		
Star category	1*	2*	3*	4*	5*	other category	***Total***
	72%	75%	67%	60%	56%	68.2%	**64.9%**
Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	75%	69%	59%	56%	***65.5%***		
Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	59%	70%	57%	69.1%	***65.5%***		
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***		
	57%	60%	65.7%	72%	***65.3%***		
Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	69%	55%	65.8%	***65.4%***			

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

Hotrec Hospitality Europe

Relative market shares (in %) of Expedia Group by country 2017



Unweighted sample. Number of observations in brackets for 2017. * indicate countries where nbe of observations are problematic. ** Data from hotel chains integrated.

Relative market shares of Expedia Group by hotel segment 2017

Hes·so VALAIS WALLIS
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***		
	13%	8%	3%	11%	***13%***		

Star category	1*	2*	3*	4*	5*	other category	***Total***
	8%	10%	10%	16%	24%	15%	**13%**

Size of hotel (rooms)	Less than 20	From 20 to 50	From 50 to 100	100 and over	***Total***		
	6%	10%	17%	20%	***13%***		

Main customer segments of hotels	Business	Vacation / leisure	MICE	Other segment	***Total***		
	14%	12%	18%	9%	***13%***		

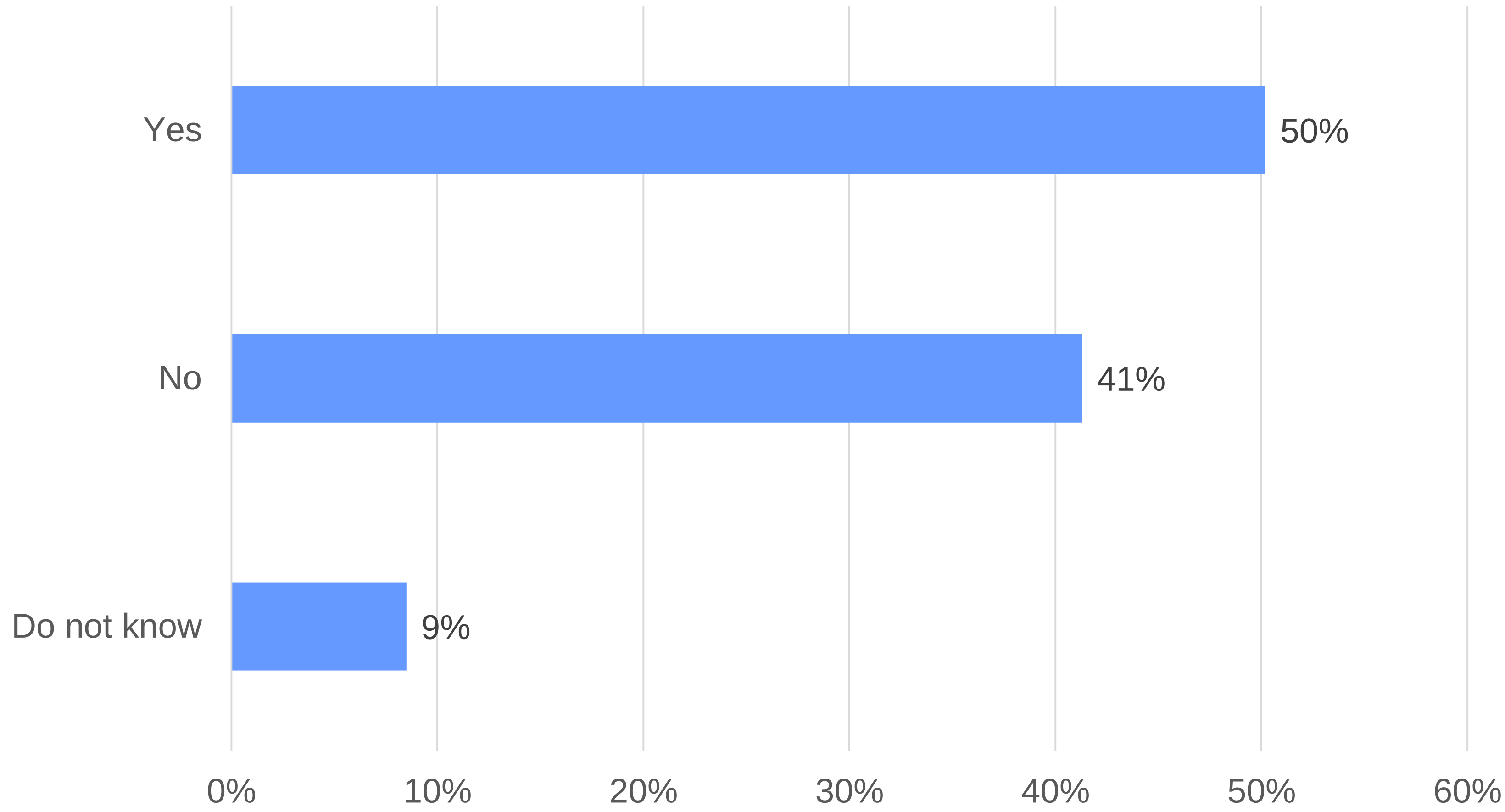
Location of hotel	City with more than 250'000 inhabitants	City between 50'000 and 250'000 inhabitants	City between 10'000 and 50'000 inhabitants	small city (less than 10'000 inhabitants)	***Total***		
	21%	15%	11%	7%	***13%***		

Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***			
	10%	22%	10%	13%			

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

OTA – Hotel Relationship

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



Based on unweighted (raw) sample data (n=2627).

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

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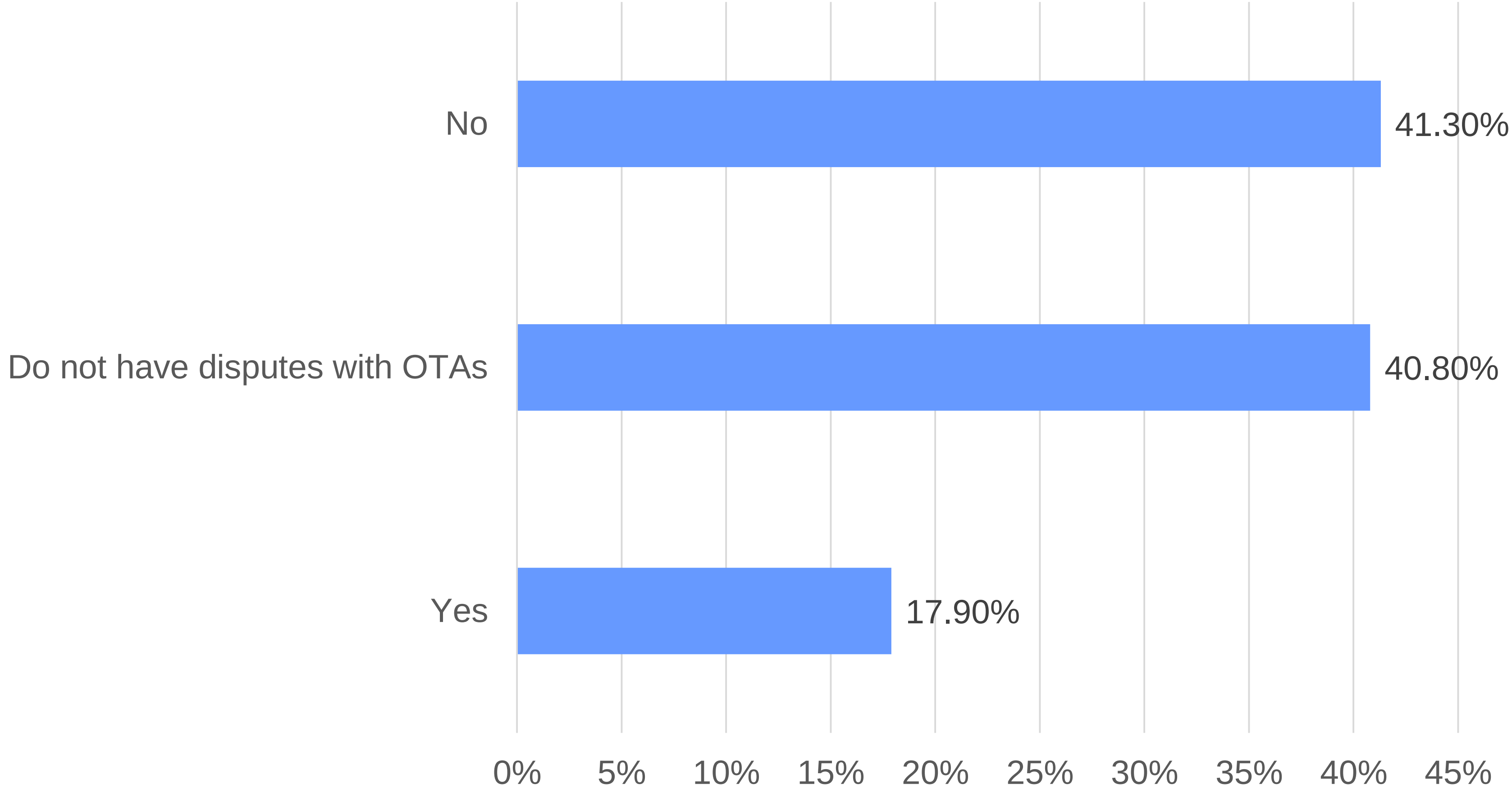
	Less than 20 rooms	From 20 to 50 rooms	50 rooms and more	Total
Yes	49.10%	52.70%	49.10%	50.30%
No	40.70%	39.00%	43.80%	41.40%
Do not know	10.20%	8.40%	7.10%	8.30%
Total	100.00%	100.00%	100.00%	

	Indep. SME hotel	Hotel chain	Hotel cooperation	Total
Yes	51.30%	45.70%	51.80%	50.30%
No	40.20%	43.70%	43.40%	41.20%
Do not know	8.60%	10.50%	4.80%	8.50%
Total	100.00%	100.00%	100.00%	

There are slight but significant differences in the perception of the pressure between independent SME or chain hotels or between small and big hotels. The proportion of hotels feeling no pressure from OTAs is larger in big hotels (more than 50 rooms) than in other size classes. Hotels belonging to a chain feel less pressured than SME hotels.

Based on unweighted (raw) sample data.

In case of a dispute with an OTA, do you consider that there is a fair and effective solution to the disagreements?



Based on unweighted (raw) sample data (n=2598).

In case of a dispute with an OTA, do you consider that there is a fair and effective solution to the disagreements?

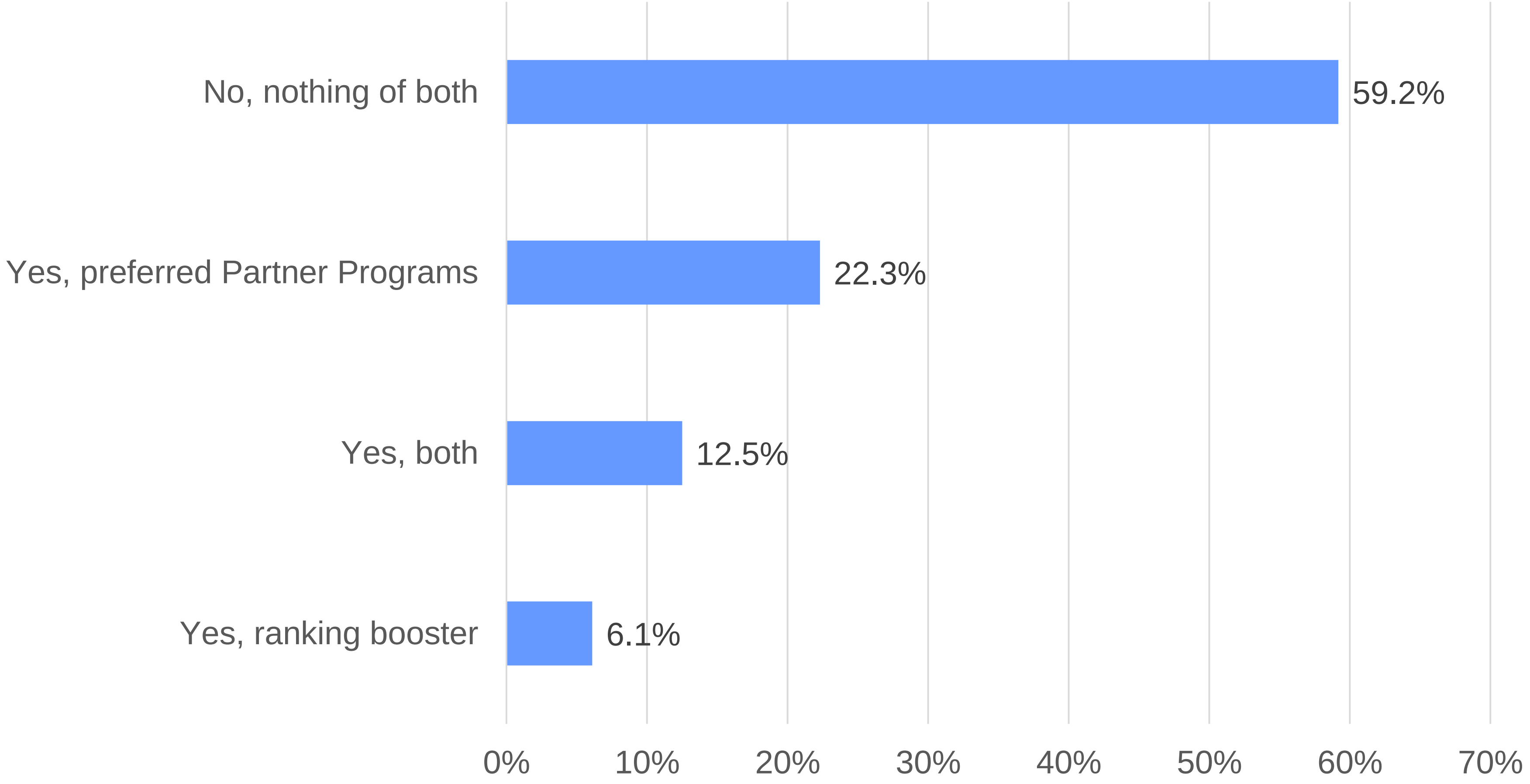
	Less than 20 rooms	From 20 to 50 rooms	50 rooms and more	Total
Yes	12.90%	16.30%	22.00%	17.70%
No	43.30%	46.20%	36.20%	41.40%
Do not have disputes with OTAs	43.90%	37.50%	41.90%	40.90%
Total	100.00%	100.00%	100.00%	

	Indep. SME hotel	Hotel chain	Hotel cooperation	Total
Yes	16.50%	23.60%	18.00%	18.00%
No	42.10%	36.00%	45.30%	41.30%
Do not have disputes with OTAs	41.40%	40.40%	36.70%	40.70%
Total	100.00%	100.00%	100.00%	

There are strong and significant differences. The big hotels (more than 50 rooms) and chain hotels do have less problems with OTAs in case of a dispute than other categories of hotels.

Values highlighted in blue are significantly higher than sample average. Cells marked in red are significantly lower. *Based on unweighted (raw) sample data.*

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



Based on unweighted (raw) sample data (n=2630).

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

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	Less than 20 rooms	From 20 to 50 rooms	50 rooms and more	Total
Preferred Partner Programs	14.00%	19.50%	30.00%	22.40%
Ranking booster	4.50%	5.90%	7.50%	6.20%
Yes, both	7.10%	10.80%	17.00%	12.40%
Nothing of both	74.40%	63.80%	45.50%	59.10%
Total	100.00%	100.00%	100.00%	

	Indep. SME hotel	Hotel chain	Hotel cooperation	Total
Preferred Partner Programs	19.20%	32.20%	24.70%	22.30%
Ranking booster	5.90%	7.00%	5.50%	6.10%
Yes, both	10.70%	20.40%	10.00%	12.50%
Nothing of both	64.10%	40.40%	59.80%	59.10%
Total	100.00%	100.00%	100.00%	

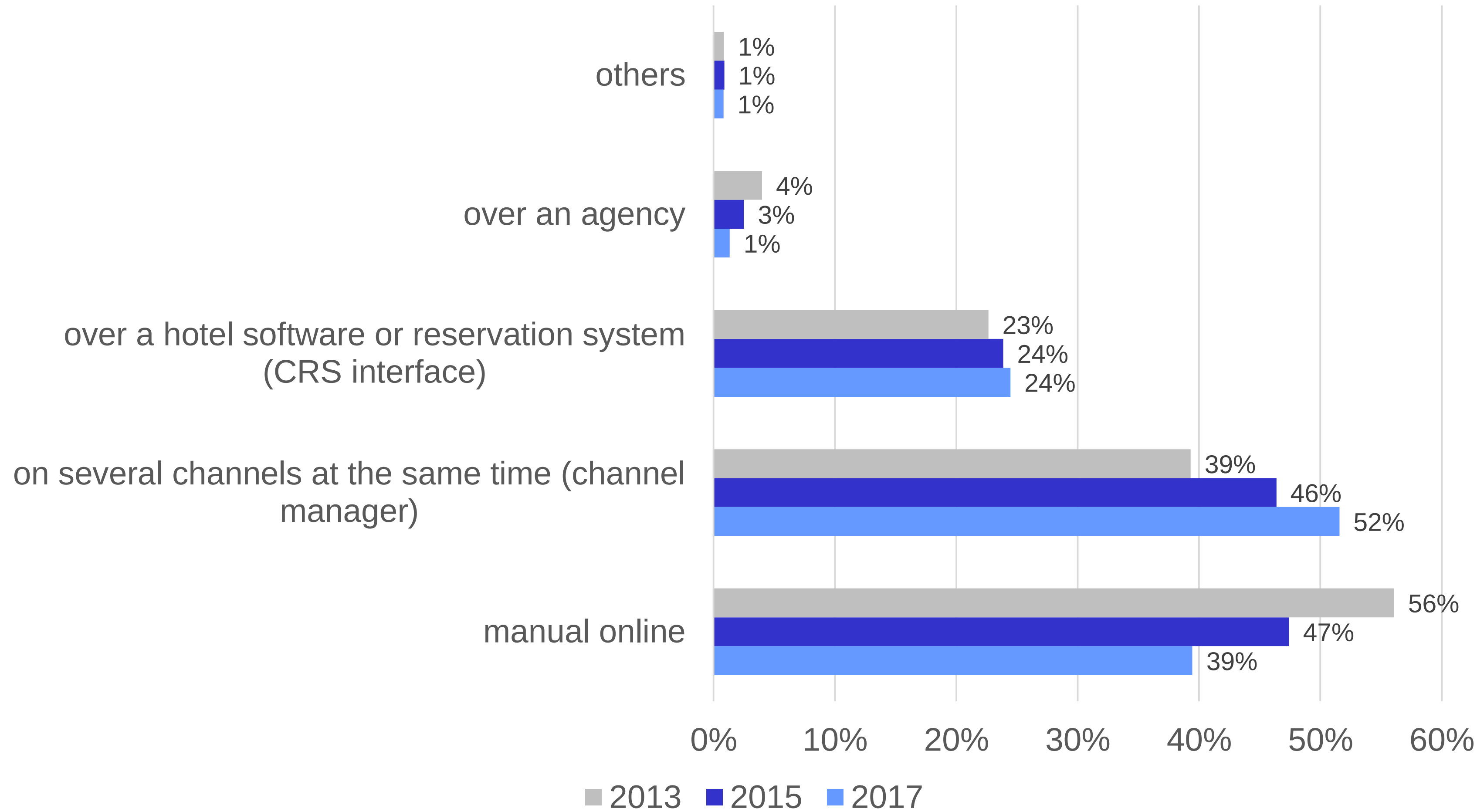
There are strong and significant differences in the use of OTA features. The Preferred Partner Programs and Ranking Booster are mainly used by big hotels (more than 50 rooms) and chain hotels.

Values highlighted in blue are significantly higher than sample average. Cells marked in red are significantly lower. *Based on unweighted (raw) sample data.*

Hospitality Europe

Distribution channel management

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



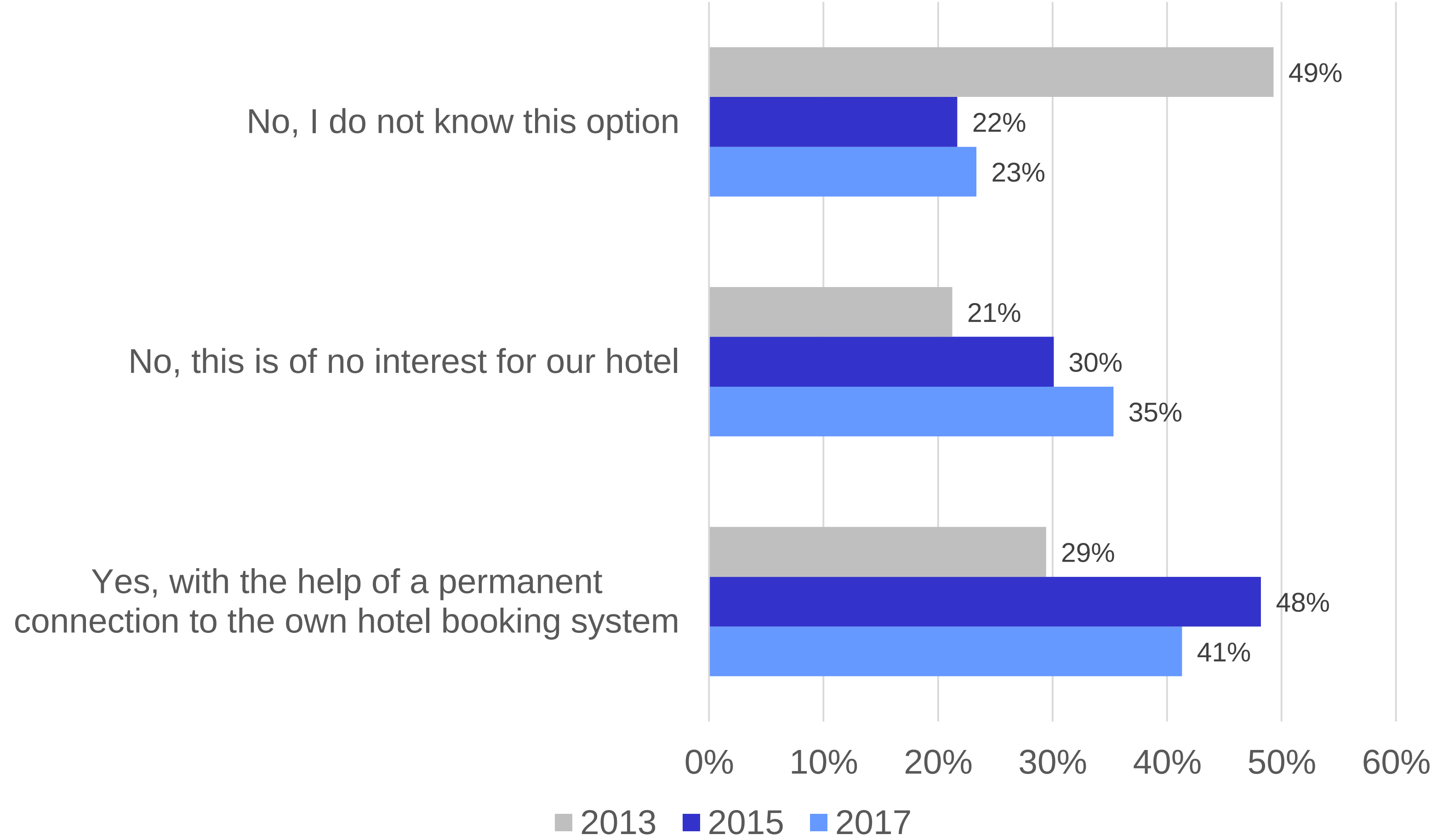
Based on unweighted (raw) sample data.

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 39%.
- As expected, chain hotels use channel managers (57% of properties) and PMS-CRS systems (44%) significantly more often than independent hotels (45% resp. 17%) which still manage channels in a manual manner most of the time (44%).
- In 4* and 5* hotels, the use of channel managers (64% and 59%, respectively) and CRS hotel software (32% and 35%, respectively) is clearly higher than in other types of hotels. In 1 and 2 star hotels more than half of properties still manage channels manually.
- Size matters: 60% of hotels with more than 50 rooms use channel managers whereas in hotels with less than 20 rooms, over 50% of properties manage channels in a manual way.

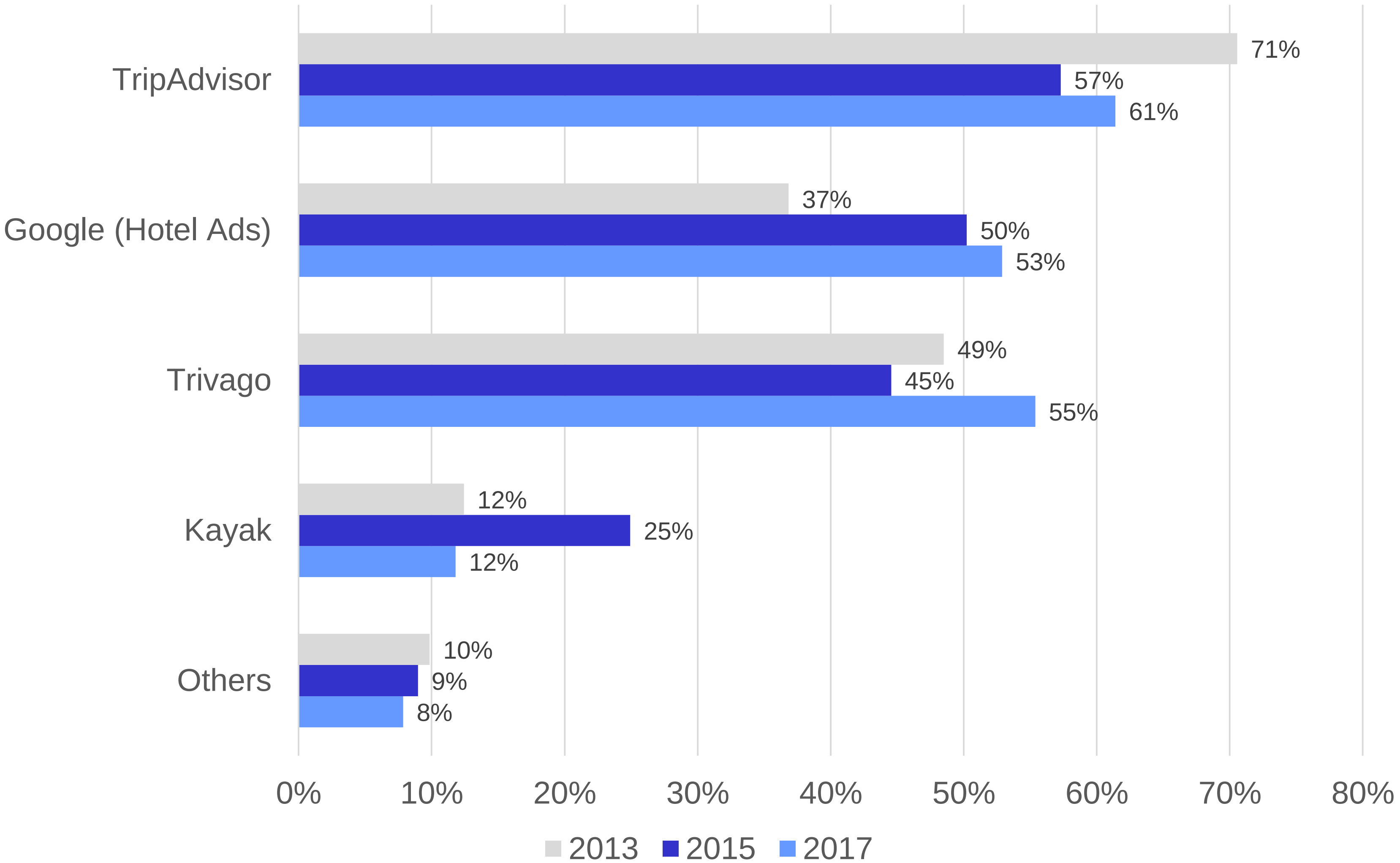
Use of meta-search engines

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 2013 where nearly half of the hotels did not know the integration options with travel meta-search engines, roughly 80% of respondents in the present survey are aware of this distribution channel which is used by 41% of hotels.
- Highest proportions of permanent connection to meta-search engines can be observed in the following hotel segments:
  - chain hotels (61% compared to independent hotels with 33%)
  - hotels with more than 100 rooms (59%)
  - 4 and 5 star hotels (55% resp. 62%)

Contact

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Annex 1: The Questionnaire (1)

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Hotrec Hospitality Europe The umbrella association of Hotels, Restaurants and Cafés in Europe

Many thanks for your interest in our survey. The results shall draw a precise picture of the current situation of distribution (online as well as offline) within the European hotel industry, especially in relation to the role of online travel agencies (OTA).

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

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

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

For technical assistance please contact Dr. Roland Schegg
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)

Country

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

Annex 1: The Questionnaire (3)

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

A. Distribution channels of hotel

What was the percentage of overnight stays in 2017 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	

Annex 1: The Questionnaire (4)

If "other distribution channels", which ones:

Optional comments regarding the development of distribution channels in general:

Annex 1: The Questionnaire (5)

B. Online Travel Agencies (OTA)

If your hotel is bookable over Online Travel Agencies (OTA), please indicate the relative distribution (in %) of these overnight stays for the year 2017.

Please put in data as whole numbers, e.g. for 21.3% it would be 21. The sum should amount to **100%.**

Agoda	
Bergfex	
Booking.com	
BookNorway	
CTrip	
eBookers (Expedia)	
Destinia	
eDreams	
Expedia.com	
Hotel.ch	
Hotel.de	
Hoteliers.com	
Hotels.nl	
Hotels.com	
HRS	
Hotelzon	
Lastminute.com	
Latebooking.com	

Annex 1: The Questionnaire (6)

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Logictravel	
Orbitz Travel (Expedia)	
Rumbo	
Tiscover	
Voyage-Privé	
Voyage-SNCF.fr (excl. Rail)	
ab-in-den-urlaub.de, hotelreservierung.de etc.	
other platforms	

Hospitality Europe

Annex 1: The Questionnaire (7)

If "other platforms", which ones:

Optional comments regarding online booking channels (OTA):

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

- ◯ Yes
- ◯ No
- ◯ Do not know

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

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

In case of a dispute with an Online Booking platform, do you consider that there is a fair and effective solution to the disagreements?

- ◯ Yes
- ◯ No
- ◯ Do not have disputes with OTAs

Annex 1: The Questionnaire (8)

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C. Use of Booking Technology and New Media

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

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

If "others", which ones? ____________________

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

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

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

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

If "Others", which? ____________________

Annex 1: The Questionnaire (9)

D. General Information about your hotel

Seasonal opening hours

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

Is your hotel classified (hotel stars)?

- ○ Yes
- ○ No

Star classification

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

Annex 1: The Questionnaire (10)

Size of hotel (number of hotel rooms)

How many overnight stays did you register in 2017?

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

How many overnight stays did you register in 2017? (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

Annex 1: The Questionnaire (11)

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.

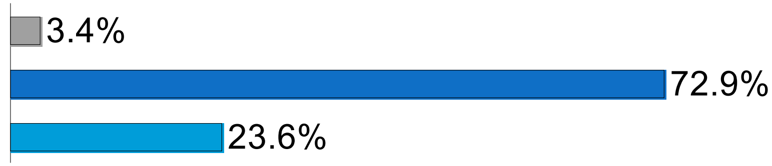
A BIG THANK YOU FOR YOUR VALUABLE COLLABORATION!

Annex 2: Sample characteristics (1)

Is your hotel classified (hotel stars)?

Response rate: **96.6%**

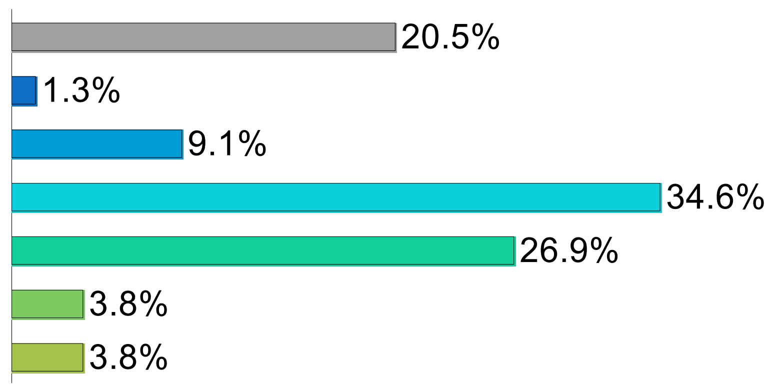
	Nbr	% obs.
Non response	**95**	**3.4%**
Yes	**2014**	**72.9%**
No	**653**	**23.6%**
Total	**2762**	**100.0%**



Star classification

Response rate: **79.5%**

	Nbr	% obs.
Non response	**566**	**20.5%**
1*	**35**	**1.3%**
2*	**252**	**9.1%**
3*	**956**	**34.6%**
4*	**743**	**26.9%**
5*	**105**	**3.8%**
other category	**105**	**3.8%**
Total	**2762**	**100.0%**



Annex 2: Sample characteristics (2)

Seasonal opening hours

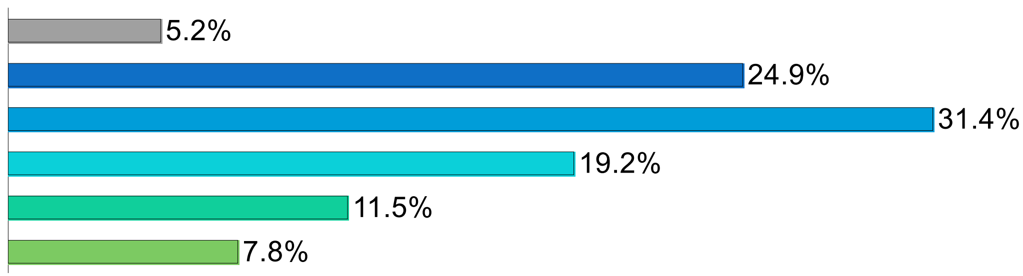
Response rate: **97.6%**

	Nbr	% obs.
Non response	**66**	**2.4%**
open all year round	**2132**	**77.2%**
two seasons business	**290**	**10.5%**
one season business (winter)	**3**	**0.1%**
one season business (summer)	**271**	**9.8%**
Total	**2762**	**100.0%**

Size of hotel (number of hotel rooms)

Response rate: **94.8%**
Mean = **68.22** Median = **38.00** Std deviation = **81.51**
Min = **1** Max = **645**

	Nbr
Non response	**144**
Less than 20	**688**
From 20 to 49	**866**
From 50 to 99	**531**
From 100 to 199	**318**
200 and more	**215**
Total	**2762**



Annex 2: Sample characteristics (3)

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How many overnight stays did you register in 2017? (estimation)

Response rate: **62.2%**

	Nbr	%
Non response	**1045**	37.8%
<2 000	**285**	10.3%
2 000-5 000	**404**	14.6%
5 000-10 000	**342**	12.4%
10 000-15 000	**219**	7.9%
20 000-25 000	**117**	4.2%
25 000-30 000	**69**	2.5%
30 000-40 000	**98**	3.5%
40 000-50 000	**46**	1.7%
>50 000	**137**	5.0%
Total	**2762**	

How many overnight stays did you register in 2017?

Response rate: **54.1%**
Mean = **31318.77** Median = **11146.00** Std deviation = **260831.27**
Min = **-1** Max = **9820298**

	Nbr	%
Non response	**1269**	45.9%
Less than 1000	**110**	4.0%
From 1000 to 4999	**303**	11.0%
From 5000 to 29999	**757**	27.4%
30000 and more	**323**	11.7%
Total	**2762**	

Annex 2: Sample characteristics (4)

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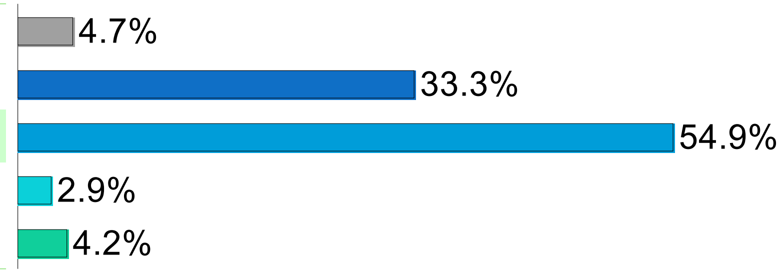
Most important customer segment

Response rate: **95.3%**

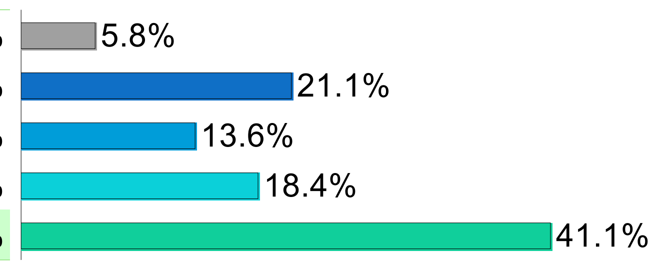
	Nbr	% obs.
Non response	**130**	**4.7%**
Business	**919**	**33.3%**
Vacation / leisure	**1516**	**54.9%**
MICE	**80**	**2.9%**
Other segment	**117**	**4.2%**
Total	**2762**	**100.0%**



Place

Response rate: **94.2%**

	Nbr	% obs.
Non response	**161**	**5.8%**
City with more than 250'000 inhabitants	**582**	**21.1%**
City between 50'000 and 250'000 inhabitants	**376**	**13.6%**
City between 10'000 and 50'000 inhabitants	**509**	**18.4%**
small city (less than 10'000 inhabitants)	**1134**	**41.1%**
Total	**2762**	**100.0%**



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Annex 2: Sample characteristics (5)

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

Response rate: **96.4%**

	Nbr	% obs.
Non response	**100**	**3.6%**
No	**1859**	**67.3%**
Yes, hotel chain	**526**	**19.0%**
Yes, hotel cooperation	**277**	**10.0%**
Total	**2762**	**100.0%**

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	**18.99**	**17.65**	**9.67**	**16.11**	**18.55**
Direct - Mail / fax	**2.08**	**1.59**	**1.67**	**1.35**	**1.95**
Direct - Walk-In (persons without reservation)	**4.52**	**3.67**	**0.67**	**3.67**	**4.34**
Direct - Contact form on own website (without availabilty check)	**5.18**	**9.70**	**0.00**	**8.61**	**6.00**
Direct - Email	**14.68**	**24.80**	**23.33**	**17.58**	**16.06**
Direct - real time booking over own website with availabilty check	**8.47**	**7.39**	**1.00**	**6.72**	**8.17**
Destination Marketing Organization (DMO) / trade associations	**0.68**	**2.41**	**0.00**	**0.71**	**0.87**
National Tourism Organization (NTO)	**0.39**	**0.93**	**0.00**	**0.43**	**0.45**
Tour operator / Travel agency	**6.50**	**7.27**	**9.67**	**19.32**	**7.86**
Online Booking Agency (OTA)	**28.66**	**20.10**	**45.67**	**20.80**	**26.98**
Hotel chains and cooperations with CRS	**1.22**	**0.24**	**0.00**	**0.09**	**1.00**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**2.22**	**0.18**	**0.00**	**0.45**	**1.83**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**2.19**	**0.59**	**0.00**	**1.41**	**1.94**
Event and Congress organizer	**2.22**	**0.83**	**0.00**	**0.87**	**1.93**
Social Media Channels	**0.49**	**0.39**	**0.00**	**0.64**	**0.49**
other distribution channels	**1.51**	**2.26**	**8.33**	**1.25**	**1.57**

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

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	1*	2*	3*	4*	5*	other category	**Total**
Direct - Phone	**21.06**	**22.48**	**18.51**	**14.40**	**13.61**	**20.77**	**17.49**
Direct - Mail / fax	**2.85**	**2.32**	**2.07**	**1.78**	**1.60**	**1.94**	**1.98**
Direct - Walk-In (persons without reservation)	**10.85**	**8.61**	**4.38**	**2.70**	**2.18**	**3.85**	**4.27**
Direct - Contact form on own website (without availabilty check)	**6.61**	**6.52**	**6.37**	**4.50**	**2.57**	**7.09**	**5.62**
Direct - Email	**10.21**	**11.85**	**17.80**	**15.15**	**14.94**	**17.44**	**15.97**
Direct - real time booking over own website with availabilty check	**8.79**	**7.76**	**7.01**	**9.67**	**10.64**	**8.26**	**8.25**
Destination Marketing Organization (DMO) / trade associations	**0.67**	**1.00**	**0.88**	**0.97**	**0.74**	**0.98**	**0.92**
National Tourism Organization (NTO)	**0.52**	**0.59**	**0.46**	**0.41**	**0.36**	**0.23**	**0.44**
Tour operator / Travel agency	**6.09**	**7.30**	**7.04**	**10.56**	**16.09**	**5.68**	**8.59**
Online Booking Agency (OTA)	**25.48**	**26.15**	**28.68**	**26.48**	**18.78**	**26.49**	**27.04**
Hotel chains and cooperations with CRS	**0.39**	**0.47**	**0.80**	**1.74**	**1.26**	**0.36**	**1.07**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**0.18**	**0.47**	**1.16**	**3.13**	**5.67**	**1.14**	**1.94**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**0.24**	**0.87**	**1.91**	**3.19**	**4.32**	**1.07**	**2.27**
Event and Congress organizer	**0.82**	**1.08**	**1.11**	**3.44**	**5.32**	**2.64**	**2.16**
Social Media Channels	**1.42**	**0.55**	**0.56**	**0.47**	**0.17**	**0.21**	**0.51**
other distribution channels	**3.82**	**1.98**	**1.26**	**1.40**	**1.76**	**1.85**	**1.48**

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

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	Less than 10	From 10 to 20	From 20 to 30	From 30 to 50	From 50 to 100	100 and over	Total
Direct - Phone	22.57	20.63	20.54	19.76	16.99	14.82	18.63
Direct - Mail / fax	2.53	1.89	2.20	1.88	1.52	2.20	1.97
Direct - Walk-In (persons without reservation)	3.96	5.37	5.52	4.34	4.27	2.45	4.26
Direct - Contact form on own website (without availabilty check)	9.74	8.62	6.24	6.75	4.37	2.75	5.91
Direct - Email	16.18	17.62	16.97	18.66	14.32	11.87	15.75
Direct - real time booking over own website with availabilty check	8.18	6.79	7.37	7.38	8.89	9.78	8.14
Destination Marketing Organization (DMO) / trade associations	1.21	1.05	0.76	0.73	0.59	0.86	0.83
National Tourism Organization (NTO)	0.99	0.48	0.49	0.25	0.32	0.32	0.41
Tour operator / Travel agency	0.94	4.43	5.81	8.04	9.83	14.35	8.24
Online Booking Agency (OTA)	29.49	29.21	28.46	26.03	27.76	22.83	26.88
Hotel chains and cooperations with CRS	0.48	0.25	0.42	0.74	1.31	2.57	1.09
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	0.09	0.10	0.61	0.85	2.65	4.95	1.85
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.26	0.77	0.90	1.60	3.56	3.52	2.05
Event and Congress organizer	0.30	0.69	1.32	0.98	2.23	4.90	2.01
Social Media Channels	0.66	0.55	0.52	0.65	0.42	0.43	0.52
other distribution channels	2.40	1.55	1.89	1.35	0.96	1.41	1.47

Annex 3 (table of means): Distribution channels by nbe of overnights (2017)

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	<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	**Total**
Direct - Phone	26.75	19.67	19.69	19.87	15.45	16.39	15.05	11.27	10.90	19.25
Direct - Mail / fax	2.45	1.94	2.41	1.67	1.18	1.45	2.86	0.76	2.85	2.12
Direct - Walk-In (persons without reservation)	5.95	5.17	4.88	4.84	3.91	3.39	2.77	3.24	2.32	4.62
Direct - Contact form on own website (without availabilty check)	8.86	7.55	6.54	5.23	6.65	4.89	3.12	2.39	2.77	6.33
Direct - Email	15.83	17.47	18.38	16.54	16.14	16.81	12.57	9.63	10.39	16.09
Direct - real time booking over own website with availabilty check	5.34	6.43	7.05	9.13	10.50	7.90	10.47	7.95	12.24	7.79
Destination Marketing Organization (DMO) / trade associations	0.94	1.07	0.74	0.92	0.33	1.18	0.96	1.56	0.66	0.89
National Tourism Organization (NTO)	0.41	0.75	0.43	0.18	0.50	0.45	0.33	0.24	0.10	0.44
Tour operator / Travel agency	3.23	6.72	7.16	8.93	9.07	8.18	9.38	14.37	14.96	7.75
Online Booking Agency (OTA)	24.76	28.52	27.42	24.84	24.50	26.92	26.45	23.37	25.81	26.42
Hotel chains and cooperations with CRS	0.34	0.56	0.37	1.08	0.54	1.68	3.12	2.76	2.61	0.96
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	0.10	0.43	0.91	1.53	3.16	2.61	4.23	5.32	5.15	1.61
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	0.76	0.91	1.05	1.47	2.99	3.34	4.17	6.71	2.93	1.72
Event and Congress organizer	0.51	0.99	1.00	2.30	2.32	2.16	2.94	7.61	5.21	1.84
Social Media Channels	0.86	0.44	0.67	0.39	0.86	0.66	0.68	0.39	0.39	0.60
other distribution channels	2.92	1.38	1.28	1.07	1.90	1.98	0.89	2.44	0.72	1.58

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

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	No	Yes, hotel chain	Yes, hotel cooperation	**Total**
Direct - Phone	**19.48**	**13.82**	**21.60**	**18.59**
Direct - Mail / fax	**1.96**	**1.93**	**1.73**	**1.93**
Direct - Walk-In (persons without reservation)	**4.56**	**3.95**	**3.43**	**4.33**
Direct - Contact form on own website (without availabilty check)	**7.06**	**2.49**	**5.28**	**5.98**
Direct - Email	**17.26**	**10.63**	**17.78**	**16.01**
Direct - real time booking over own website with availabilty check	**7.30**	**10.71**	**9.28**	**8.18**
Destination Marketing Organization (DMO) / trade associations	**0.84**	**0.88**	**1.10**	**0.87**
National Tourism Organization (NTO)	**0.46**	**0.30**	**0.59**	**0.44**
Tour operator / Travel agency	**7.21**	**10.77**	**6.94**	**7.88**
Online Booking Agency (OTA)	**27.87**	**26.18**	**22.53**	**26.98**
Hotel chains and cooperations with CRS	**0.13**	**3.44**	**2.39**	**1.01**
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	**0.82**	**5.64**	**1.77**	**1.86**
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	**1.40**	**4.00**	**1.52**	**1.93**
Event and Congress organizer	**1.42**	**3.73**	**2.15**	**1.95**
Social Media Channels	**0.54**	**0.27**	**0.57**	**0.49**
other distribution channels	**1.69**	**1.26**	**1.33**	**1.57**

Hospitality Europe

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

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	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	10.56	18.13	22.17	21.32	18.65
Direct - Mail / fax	1.54	2.18	2.10	2.06	1.97
Direct - Walk-In (persons without reservation)	3.15	4.60	4.72	4.65	4.32
Direct - Contact form on own website (without availabilty check)	2.40	4.35	5.17	8.73	6.00
Direct - Email	11.27	14.97	17.51	18.37	16.15
Direct - real time booking over own website with availabilty check	10.02	8.32	7.27	7.57	8.16
Destination Marketing Organization (DMO) / trade associations	0.76	0.58	0.74	1.08	0.87
National Tourism Organization (NTO)	0.28	0.27	0.42	0.59	0.44
Tour operator / Travel agency	7.47	6.91	7.45	8.37	7.78
Online Booking Agency (OTA)	36.36	29.01	25.23	22.08	26.85
Hotel chains and cooperations with CRS	1.41	2.18	1.07	0.45	1.03
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	4.53	2.88	1.59	0.26	1.84
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	4.91	1.84	1.12	0.86	1.95
Event and Congress organizer	3.56	2.47	1.65	1.13	1.96
Social Media Channels	0.34	0.42	0.56	0.56	0.49
other distribution channels	1.46	0.89	1.21	1.91	1.53

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

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	Business	Vacation / leisure	MICE	Other segment	**Total**
Direct - Phone	22.16	15.95	19.76	27.75	18.75
Direct - Mail / fax	2.21	1.79	0.99	3.05	1.97
Direct - Walk-In (persons without reservation)	5.12	3.82	2.71	6.29	4.35
Direct - Contact form on own website (without availabilty check)	3.89	7.23	6.27	5.99	5.98
Direct - Email	16.48	15.71	21.40	15.47	16.14
Direct - real time booking over own website with availabilty check	7.83	8.40	8.51	6.18	8.11
Destination Marketing Organization (DMO) / trade associations	0.53	1.03	1.73	0.99	0.88
National Tourism Organization (NTO)	0.36	0.50	0.39	0.56	0.45
Tour operator / Travel agency	3.90	10.45	5.35	8.57	7.92
Online Booking Agency (OTA)	26.31	28.07	16.76	18.79	26.71
Hotel chains and cooperations with CRS	1.88	0.56	1.36	0.09	1.03
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	3.47	0.85	2.33	0.48	1.79
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.56	2.27	1.67	0.83	1.94
Event and Congress organizer	2.56	1.28	8.76	1.41	1.96
Social Media Channels	0.31	0.61	0.63	0.52	0.50
other distribution channels	1.42	1.47	1.40	3.04	1.52

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Annex 4 (table of means): Main OTAs by category

	1*	2*	3*	4*	5*	other category	Total
Agoda	0.95	0.27	0.76	1.11	1.90	1.18	0.91
Booking.com	72.42	74.78	67.42	59.59	55.72	68.18	64.90
eBookers (Expedia)	0.79	1.17	1.01	1.33	0.88	0.85	1.12
Expedia.com	8.42	9.74	10.40	16.14	24.23	14.78	13.20
Hotel.de	0.26	0.43	1.17	1.63	0.42	0.38	1.18
Hotels.com	3.42	2.93	2.33	3.25	2.10	2.15	2.71
HRS	5.11	2.95	9.30	8.23	1.74	5.19	7.71
other platforms	7.53	5.08	4.47	5.67	9.64	5.00	5.26

Only OTAs with more than 0.8% market share shown.

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

	Less than 10	From 10 to 20	From 20 to 30	From 30 to 50	From 50 to 100	100 and over	**Total**
Agoda	0.18	0.24	1.15	0.52	1.07	1.31	0.84
Booking.com	80.76	71.09	70.47	67.82	59.09	55.11	64.61
eBookers (Expedia)	0.25	1.01	1.27	1.13	1.41	1.53	1.24
Expedia.com	4.55	6.79	6.74	11.07	16.58	19.66	12.57
Hotel.de	0.65	1.09	1.91	0.94	1.34	1.21	1.23
Hotels.com	0.99	1.60	2.48	2.55	3.63	3.78	2.82
HRS	4.91	8.44	9.72	8.22	8.50	7.17	8.12
other platforms	5.87	7.22	4.15	4.43	5.82	6.05	5.60

Only OTAs with more than 0.8% market share shown.

Annex 4 (table of means): Main OTAs by nbe of overnights (2017)

	<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	**Total**
Agoda	**0.78**	**0.38**	**0.45**	**0.99**	**0.85**	**2.20**	**1.68**	**1.85**	**1.48**	**0.85**
Booking.com	**77.67**	**72.31**	**67.97**	**63.31**	**55.06**	**61.63**	**54.72**	**52.03**	**57.62**	**66.20**
eBookers (Expedia)	**0.77**	**1.38**	**0.66**	**1.12**	**1.22**	**2.22**	**1.47**	**1.88**	**1.37**	**1.15**
Expedia.com	**6.13**	**7.01**	**10.15**	**13.92**	**18.12**	**14.65**	**18.86**	**20.82**	**20.62**	**11.95**
Hotel.de	**1.08**	**1.35**	**1.06**	**1.09**	**2.06**	**0.69**	**1.68**	**1.30**	**1.14**	**1.24**
Hotels.com	**1.10**	**1.98**	**2.70**	**2.87**	**2.77**	**3.65**	**3.94**	**2.61**	**2.30**	**2.44**
HRS	**5.31**	**7.01**	**8.36**	**9.09**	**7.57**	**5.98**	**8.53**	**7.82**	**4.95**	**7.32**
other platforms	**5.15**	**6.44**	**5.34**	**5.00**	**6.79**	**4.71**	**6.78**	**7.06**	**7.05**	**5.89**

Only OTAs with more than 0.8% market share shown.

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

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	No	Yes, hotel chain	Yes, hotel cooperation	**Total**
Agoda	**0.66**	**1.39**	**0.96**	**0.85**
Booking.com	**68.89**	**54.67**	**65.79**	**65.38**
eBookers (Expedia)	**0.91**	**1.84**	**1.21**	**1.15**
Expedia.com	**9.88**	**22.15**	**10.22**	**12.66**
Hotel.de	**1.18**	**1.01**	**1.50**	**1.18**
Hotels.com	**2.24**	**4.15**	**2.62**	**2.71**
HRS	**7.99**	**6.23**	**10.10**	**7.83**
other platforms	**5.46**	**4.96**	**5.88**	**5.39**

Only OTAs with more than 0.8% market share shown.

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Annex 4 (table of means): Main OTAs by size of city

	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	**1.90**	**0.60**	**0.33**	**0.57**	**0.86**
Booking.com	**56.71**	**60.00**	**65.69**	**72.49**	**65.26**
eBookers (Expedia)	**1.12**	**1.71**	**0.90**	**1.07**	**1.15**
Expedia.com	**20.62**	**15.01**	**11.17**	**7.40**	**12.64**
Hotel.de	**0.89**	**1.21**	**1.79**	**1.10**	**1.20**
Hotels.com	**3.47**	**4.17**	**2.21**	**1.91**	**2.71**
HRS	**7.61**	**9.62**	**10.61**	**6.03**	**7.89**
other platforms	**5.04**	**4.48**	**5.10**	**6.35**	**5.49**

Only OTAs with more than 0.8% market share shown.

Annex 4 (table of means): OTAs by main customer segment

	Business	Vacation / leisure	MICE	Other segment	**Total**
Agoda	**0.66**	**0.92**	**2.22**	**0.86**	**0.86**
Booking.com	**58.56**	**70.29**	**57.38**	**69.08**	**65.54**
eBookers (Expedia)	**1.18**	**1.13**	**0.83**	**1.94**	**1.17**
Expedia.com	**13.62**	**11.67**	**18.17**	**9.03**	**12.51**
Hotel.de	**1.87**	**0.70**	**1.36**	**1.61**	**1.18**
Hotels.com	**3.24**	**2.32**	**5.77**	**1.52**	**2.74**
HRS	**14.75**	**3.61**	**5.52**	**6.52**	**7.84**
other platforms	**3.70**	**6.21**	**5.64**	**7.75**	**5.32**

Only OTAs with more than 0.8% market share shown.