

Hotel Distribution Study France

Results for the Reference Year 2019

March 23, 2021

Prof. Roland Schegg
Institute of Tourism, HES-SO Valais-Wallis
(Sierre, Switzerland)
roland.schegg@hevs.ch

The survey: background

- 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 2020 together with hotel associations from HOTREC member countries across Europe for the reference year 2019.**
- Results for the reference year 2019 are based on observations from more than 2'800 hotels across **Europe**, without data from France, which have been integrated later.
- In **France** the survey was sent to hotel members by the **GNC, GNI and UMIH during summer 2020.** A total of 878 responses could be analysed.
- Details on the sample characteristics can be found in annex 2.

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 HOTREC questionnaire. The questionnaire in France had the same questions as in HOTREC's questionnaire and a series of other questions related to the situation in France. Only common questions have been analyzed in this report.

Distribution channels



Market shares of distribution channels in Europe 2019 (without data from France)

<i>Unweighted overall sample (2'166 valid observations for the distribution channels)</i>	Market share 2019		confidence interval	
Direct - Phone	18.2	54.5	17.5	19.0
Direct - Mail / fax	1.5		1.3	1.7
Direct - Walk-In (persons without reservation)	4.4		4.1	4.7
Direct - Contact form on own website (without availability check)	6.1		5.6	6.6
Direct - Email	16.5		15.8	17.2
Direct - real time booking over own website with availability check	7.8		7.4	8.2
Destination Marketing Organization (DMO) / trade associations	0.8	1.1	0.7	0.9
National Tourism Organization (NTO)	0.3		0.2	0.4
Tour operator / Travel agency	8.7	12.8	8.0	9.4
Hotel chains and cooperations with CRS	0.8		0.6	0.9
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		1.4	1.8
Event and Congress organizer	1.7		1.5	1.9
Online Booking Agency (OTA)	27.3	29.4	26.3	28.3
Globale Distributionssysteme (GDS)	1.4		1.1	1.6
Social Media Channels	0.7		0.5	0.9
other distribution channels	2.3	2.3	2.0	2.6

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

Market shares of distribution channels 2019: **FRANCE**

<i>Unweighted overall sample (878 valid observations for the distribution channels)</i>	Market share 2019		confidence interval	
Direct - Phone	25.0	58.3	23.6	26.4
Direct - Mail / fax	1.7		1.4	2.1
Direct - Walk-In (persons without reservation)	6.3		5.8	6.8
Direct - Contact form on own website (without availability check)	4.5		3.8	5.2
Direct - Email	8.9		8.1	9.7
Direct - real time booking over own website with availability check	11.9		11.0	12.8
Destination Marketing Organization (DMO) / trade associations	0.8	1.1	0.5	1.1
National Tourism Organization (NTO)	0.3		0.2	0.4
Tour operator / Travel agency	4.2	9.5	3.6	4.9
Hotel chains and cooperations with CRS	2.0		1.6	2.4
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.8		1.4	2.2
Event and Congress organizer	1.5		1.2	1.8
Online Booking Agency (OTA)	25.6	27.6	24.2	27.1
Globale Distributionssysteme (GDS)	1.6		1.3	1.9
Social Media Channels	0.4		0.2	0.6
other distribution channels	3.5	3.5	2.7	5.5

Unweighted samples. Market shares in % of overnights.

Market shares of distribution channels

2019 Europe including data from France

Overall sample (3044 valid observations for the distribution channels)	Market share 2019	
Direct - Phone	19.1	55.0
Direct - Mail / fax	1.5	
Direct - Walk-In (persons without reservation)	4.7	
Direct - Contact form on own website (without availability check)	5.9	
Direct - Email	15.5	
Direct - real time booking over own website with availability check	8.3	
Destination Marketing Organization (DMO) / trade associations	0.8	1.1
National Tourism Organization (NTO)	0.3	
Tour operator / Travel agency	8.1	12.3
Hotel chains and cooperations with CRS	0.9	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.7	
Event and Congress organizer	1.7	
Online Booking Agency (OTA)	27.1	29.1
Globale Distributionssysteme (GDS)	1.4	
Social Media Channels	0.7	
other distribution channels	2.5	2.5

Combined survey data from HOTREC study n=2166 and the French study n=878. Market shares in % of overnights.

Evolution market shares of distribution channels in Europe **2013 to 2019** (2019 without data from France)

	Market share 2019 (n=2166)		Market share 2017 (n=2'593)		Market share 2015 (n=2'188)		Market share 2013 (n=2'221)		DELTA (2019-2013)	
Direct - Phone	18.2	54.5	18.5	55.1	18.7	55.2	21.1	59.4	-2.9	-4.9
Direct - Mail / fax	1.5		2.0		2.3		3.1		-1.7	
Direct - Walk-In (persons without reservation)	4.4		4.4		4.8		6.0		-1.6	
Direct - Contact form on own website (without availability check)	6.1		6.0		6.1		6.1		0.0	
Direct - Email	16.5		16.0		16.7		16.1		0.3	
Direct - real time booking over own website with availability check	7.8		8.2		6.8		6.9		0.9	
Destination Marketing Organization (DMO) / trade associations	0.8	1.1	0.9	1.3	0.9	1.4	1.0	1.7	-0.3	-0.6
National Tourism Organization (NTO)	0.3		0.5		0.6		0.6		-0.3	
Tour operator / Travel agency	8.7	12.8	7.8	12.7	8.0	16.3	9.6	15.7	-0.9	-2.9
Hotel chains and cooperations with CRS	0.8		1.0		2.6		1.4		-0.6	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.6		1.9		2.6		2.8		-1.2	
Event and Congress organizer	1.7		1.9		3.1		1.9		-0.3	
Online Booking Agency (OTA)	27.3		26.9		22.3		19.3		8.1	
Globale Distribution Systems (GDS)	1.4	29.4	1.9	29.3	2.7	25.5	2.0	21.8	-0.7	7.6
Social Media Channels	0.7		0.5		0.5		0.5		0.2	
Other distribution channels	2.3	2.3	1.6	1.6	1.5	1.5	1.5	1.5	0.9	0.9

Unweighted sample. Market shares in % of overnights.

Market shares of distribution channels in **FRANCE**: 2017 versus 2019

<i>Unweighted samples</i>	Market share 2019 (n=878)	Market share 2017 (n=158)
Direct - Phone	25.0	26.3
Direct - Mail / fax	1.7	1.6
Direct - Walk-In (persons without reservation)	6.3	8.5
Direct - Contact form on own website (without availability check)	4.5	3.7
Direct - Email	8.9	10.3
Direct - real time booking over own website with availability check	11.9	12.5
Destination Marketing Organization (DMO) / trade associations	0.8	0.7
National Tourism Organization (NTO)	0.3	0.4
Tour operator / Travel agency	4.2	3.8
Hotel chains and cooperations with CRS	2.0	2.5
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.8	1.1
Event and Congress organizer	1.5	1.9
Online Booking Agency (OTA)	25.6	22.4
Globale Distributionssysteme (GDS)	1.6	2.0
Social Media Channels	0.4	0.3
other distribution channels	3.5	2.2

Weighted samples. Market shares in % of overnights.

Evolution market shares of distribution channels in Europe 2013 to 2019 (2019 including data from France)

	Market share 2019 (n=3044)		Market share 2017 (n=2'593)		Market share 2015 (n=2'188)		Market share 2013 (n=2'221)		DELTA (2019-2013)	
Direct - Phone	19.1	55.0	18.5	55.1	18.7	55.2	21.1	59.4	-2.0	-4.4
Direct - Mail / fax	1.5		2.0		2.3		3.1		-1.6	
Direct - Walk-In (persons without reservation)	4.7		4.4		4.8		6.0		-1.3	
Direct - Contact form on own website (without availability check)	5.9		6.0		6.1		6.1		-0.2	
Direct - Email	15.5		16.0		16.7		16.1		-0.7	
Direct - real time booking over own website with availability check	8.3		8.2		6.8		6.9		1.4	
Destination Marketing Organization (DMO) / trade associations	0.8	1.1	0.9	1.3	0.9	1.4	1.0	1.7	-0.3	-0.5
National Tourism Organization (NTO)	0.3		0.5		0.6		0.6		-0.3	
Tour operator / Travel agency	8.1	12.3	7.8	12.7	8.0	16.3	9.6	15.7	-1.5	-3.4
Hotel chains and cooperations with CRS	0.9		1.0		2.6		1.4		-0.4	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	1.7		1.9		2.6		2.8		-1.2	
Event and Congress organizer	1.7		1.9		3.1		1.9		-0.3	
Online Booking Agency (OTA)	27.1	29.1	26.9	29.3	22.3	25.5	19.3	21.8	7.8	7.4
Globale Distribution Systems (GDS)	1.4		1.9		2.7		2.0		-0.7	
Social Media Channels	0.7		0.5		0.5		0.5		0.2	
Other distribution channels	2.5	2.5	1.6	1.6	1.5	1.5	1.5	1.5	1.0	1.0

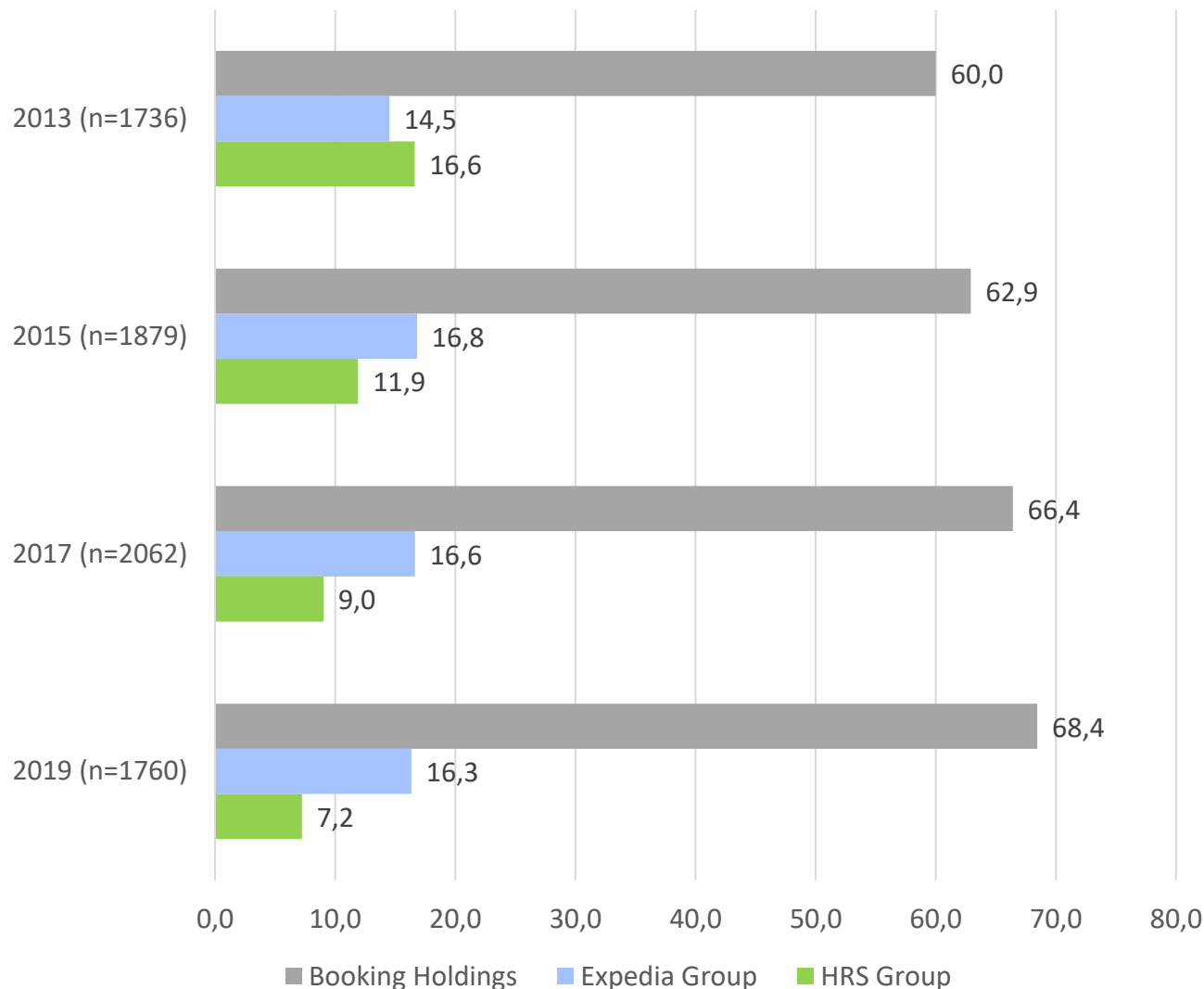
Unweighted sample. Market shares in % of overnights.

Analysis of OTA market players and their relative market shares



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

Unweighted relative market shares (in %) of major OTAs in Europe (without data from France)

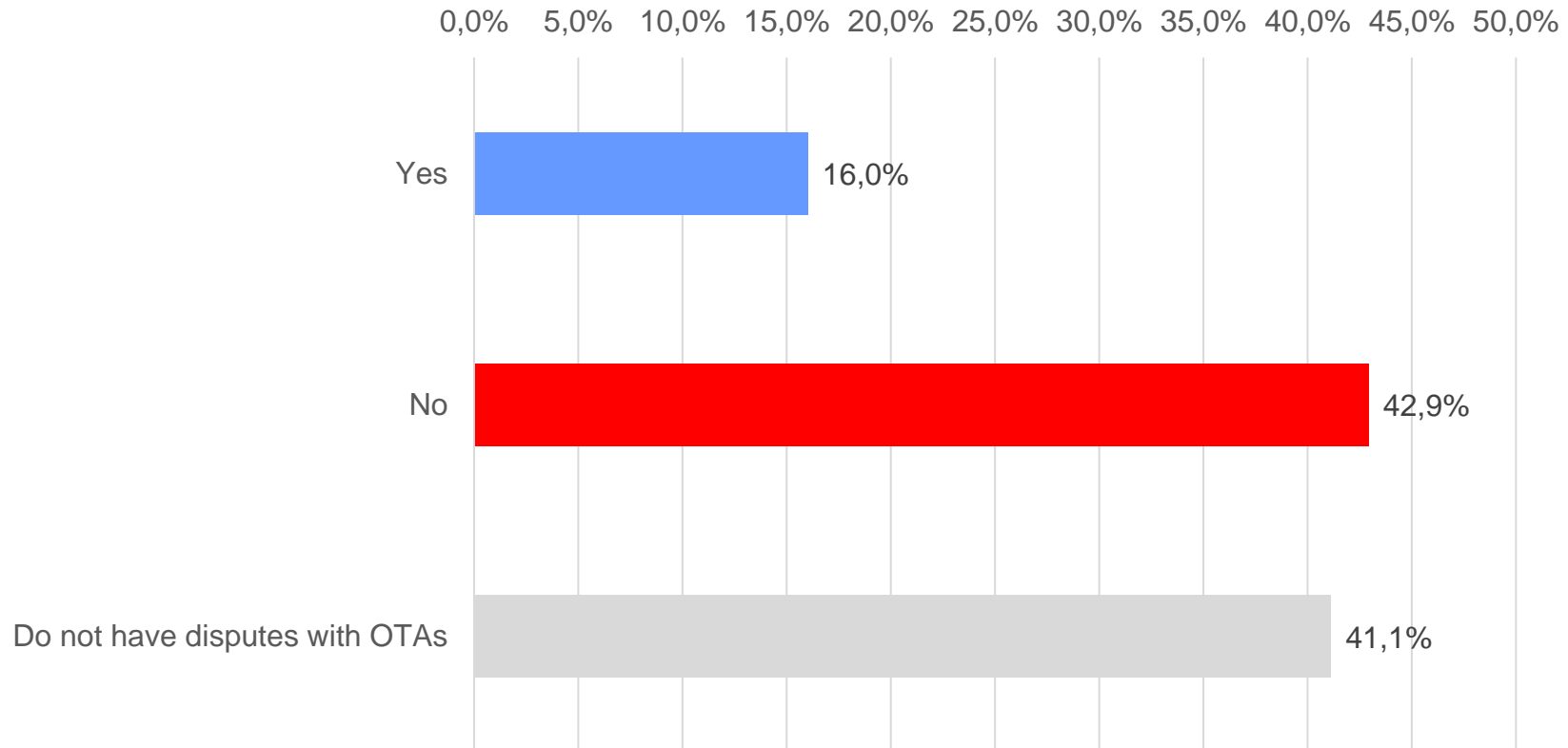


	Europe 2019 (n=1760)
Agoda	0.8
Booking.com	67.7
Booking Holdings	68.4
HRS	6.3
hotel.ch	0.1
Hotel.de	0.8
Tiscover	0.1
HRS (total)	7.2
Expedia	12.8
Hotels.com	2.1
eBookers	1.2
Orbitz Travel	0.2
Expedia Group	16.3
TOTAL	92.0

Unweighted relative market shares (in %) of major OTAs: Europe versus **FRANCE**

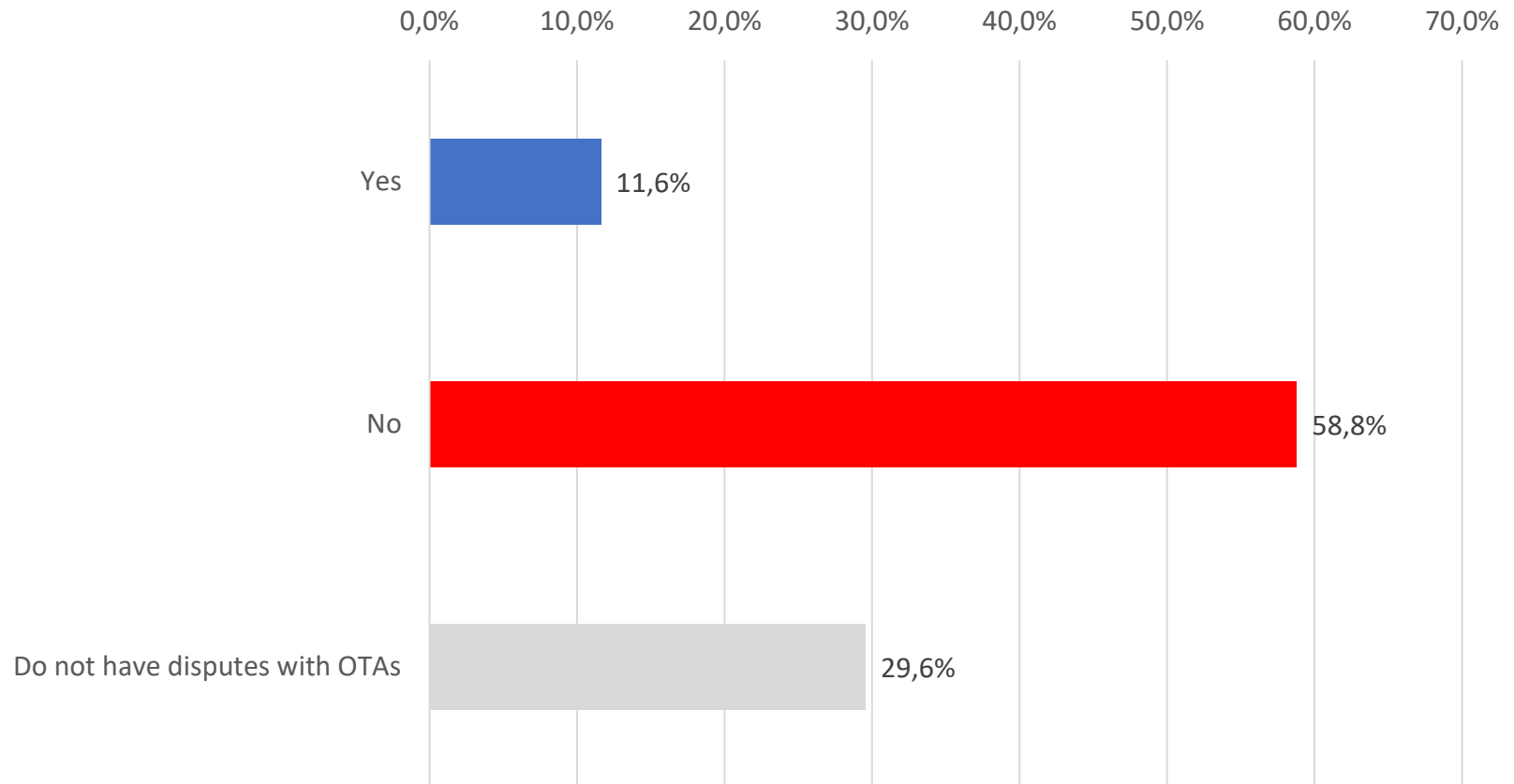
	Europe 2019 (n=1760)	France 2019 (n=566)
Agoda	0.8	1.0
Booking.com	67.7	67.4
Booking Holdings	68.4	68.5
HRS	6.3	2.4
hotel.ch	0.1	0.1
Hotel.de	0.8	0.5
Tiscover	0.1	0.0
HRS (total)	7.2	2.9
Expedia	12.8	16.9
Hotels.com	2.1	3.3
eBookers	1.2	1.7
Orbitz Travel	0.2	0.1
Expedia Group	16.3	22.0
TOTAL	92.0	93.4
Airbnb	na	0.7
Voyage privé	na	0.2
Voyage SNCF	na	0.2

Europe (without data from France): In case of a dispute with an OTA, is there a fair and effective solution to the disagreements?



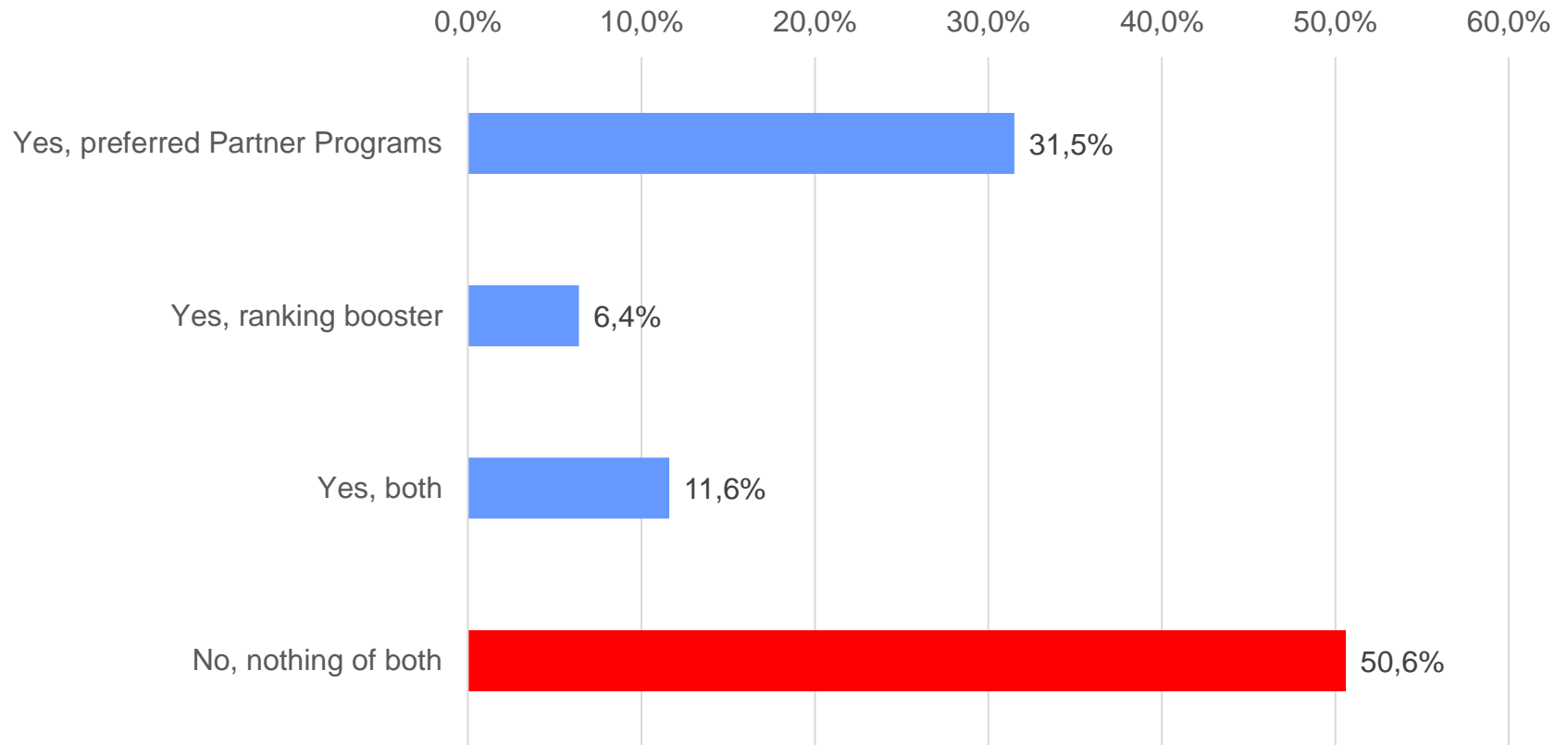
Based on unweighted (raw) sample data (n=1753).

FRANCE: In case of a dispute with an OTA, is there a fair and effective solution to the disagreements?



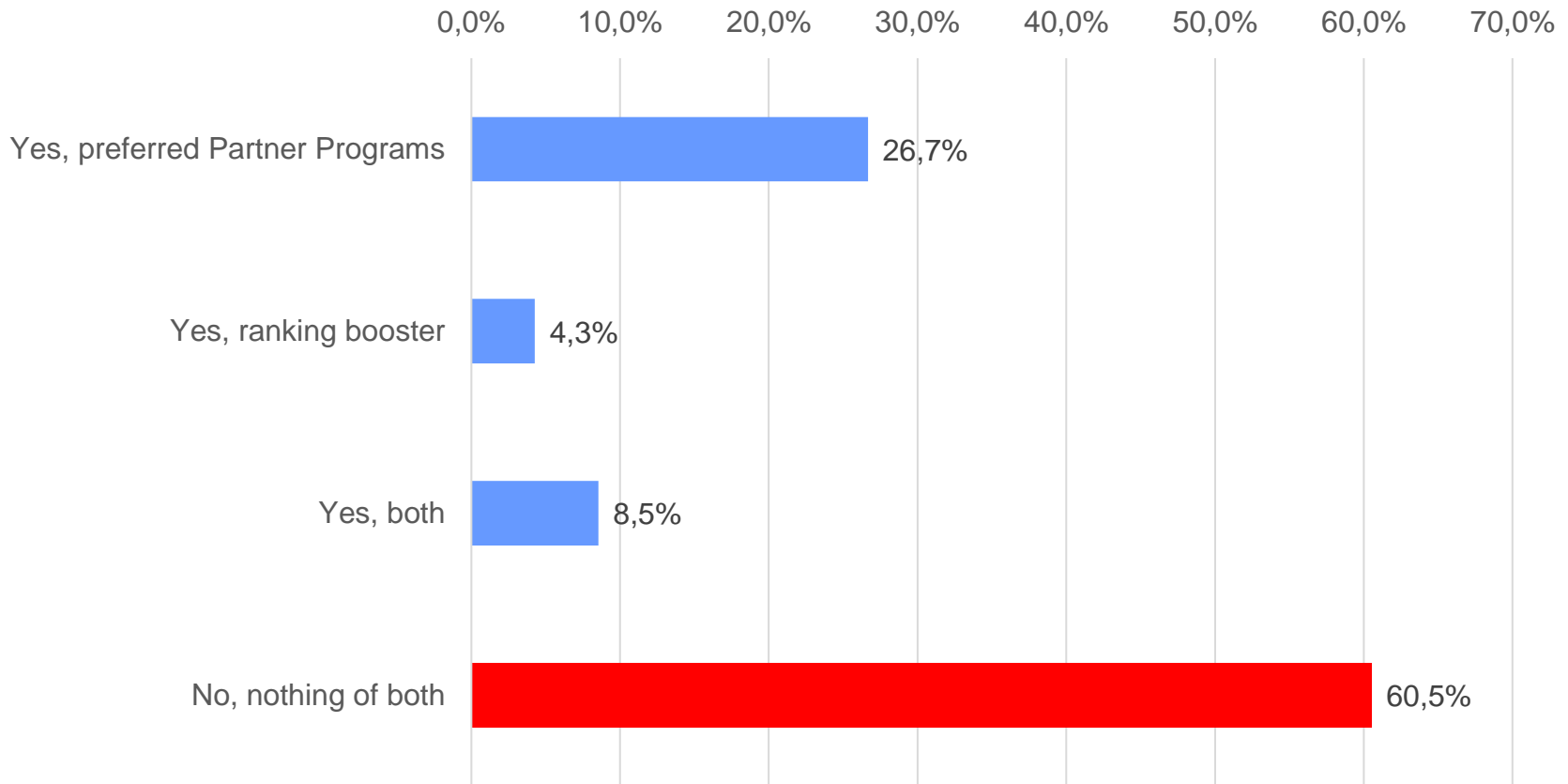
Based on unweighted (raw) sample data (n=585).

Europe (without data from France): Have you ever made use of the various possibilities offered by OTA to improve effectively your ranking?



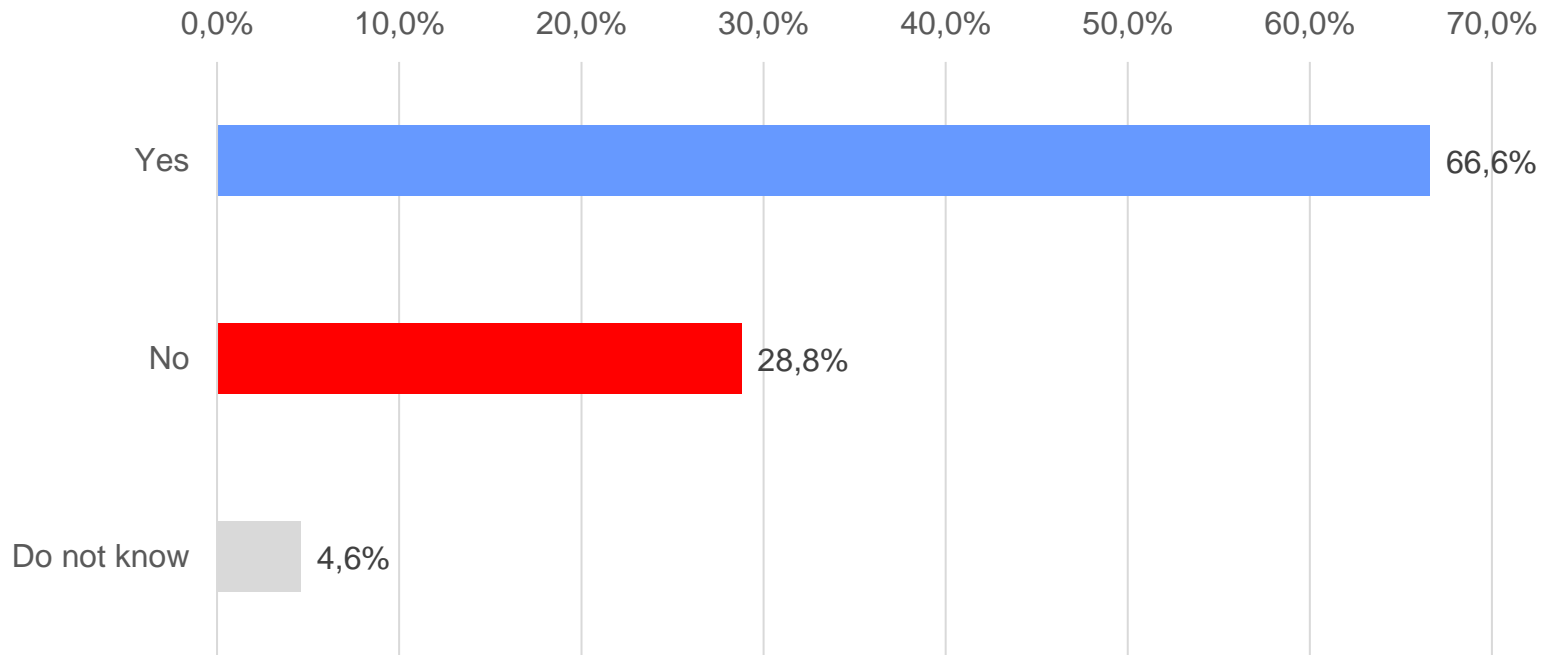
Based on unweighted (raw) sample data (n=1980).

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



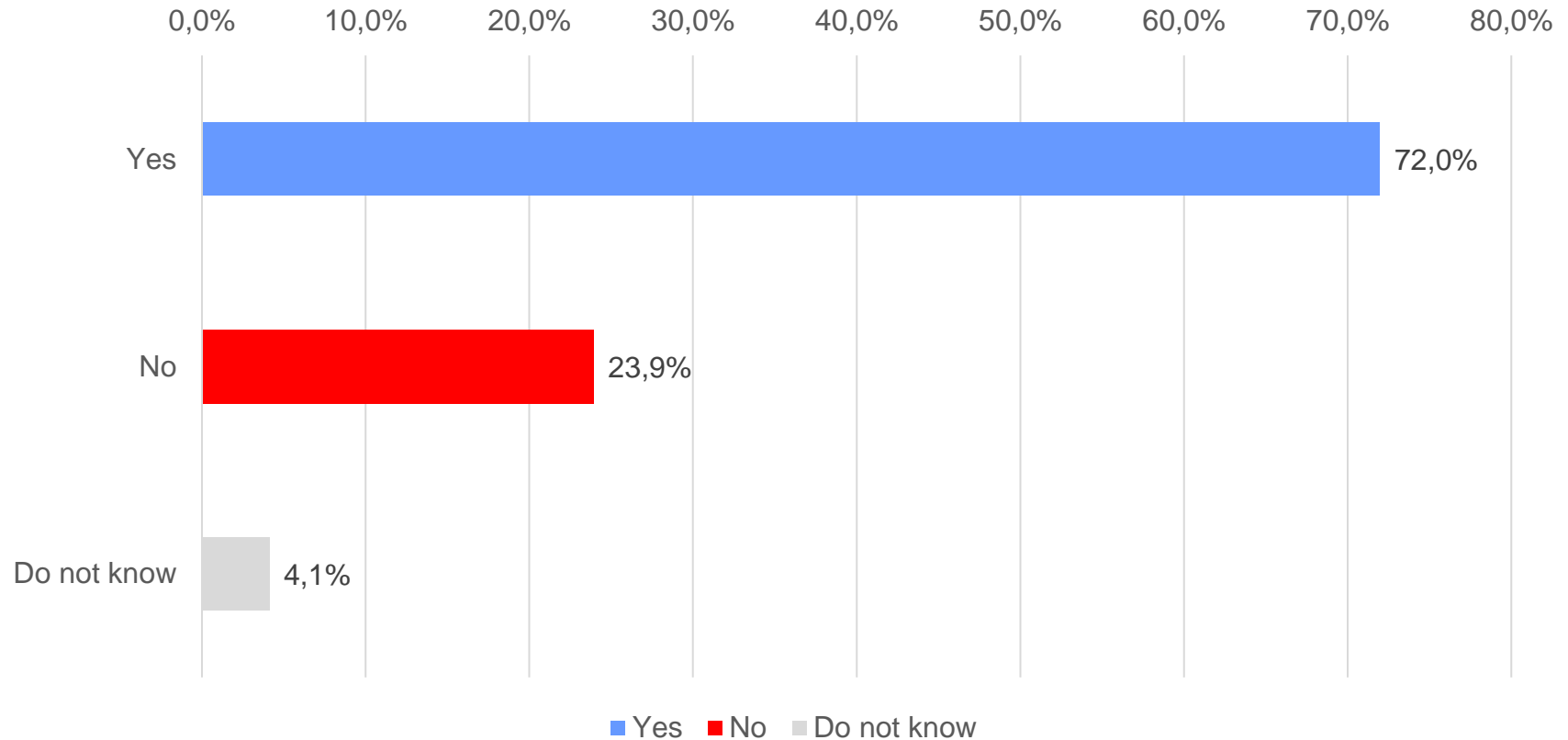
Based on unweighted (raw) sample data (n=585).

Europe (without data from France): Do you use the online payment of Booking or Expedia (Expedia Collect bookings)?



Based on unweighted (raw) sample data (n=1981).

FRANCE: Do you use the online payment of Booking or Expedia (Expedia Collect bookings)?

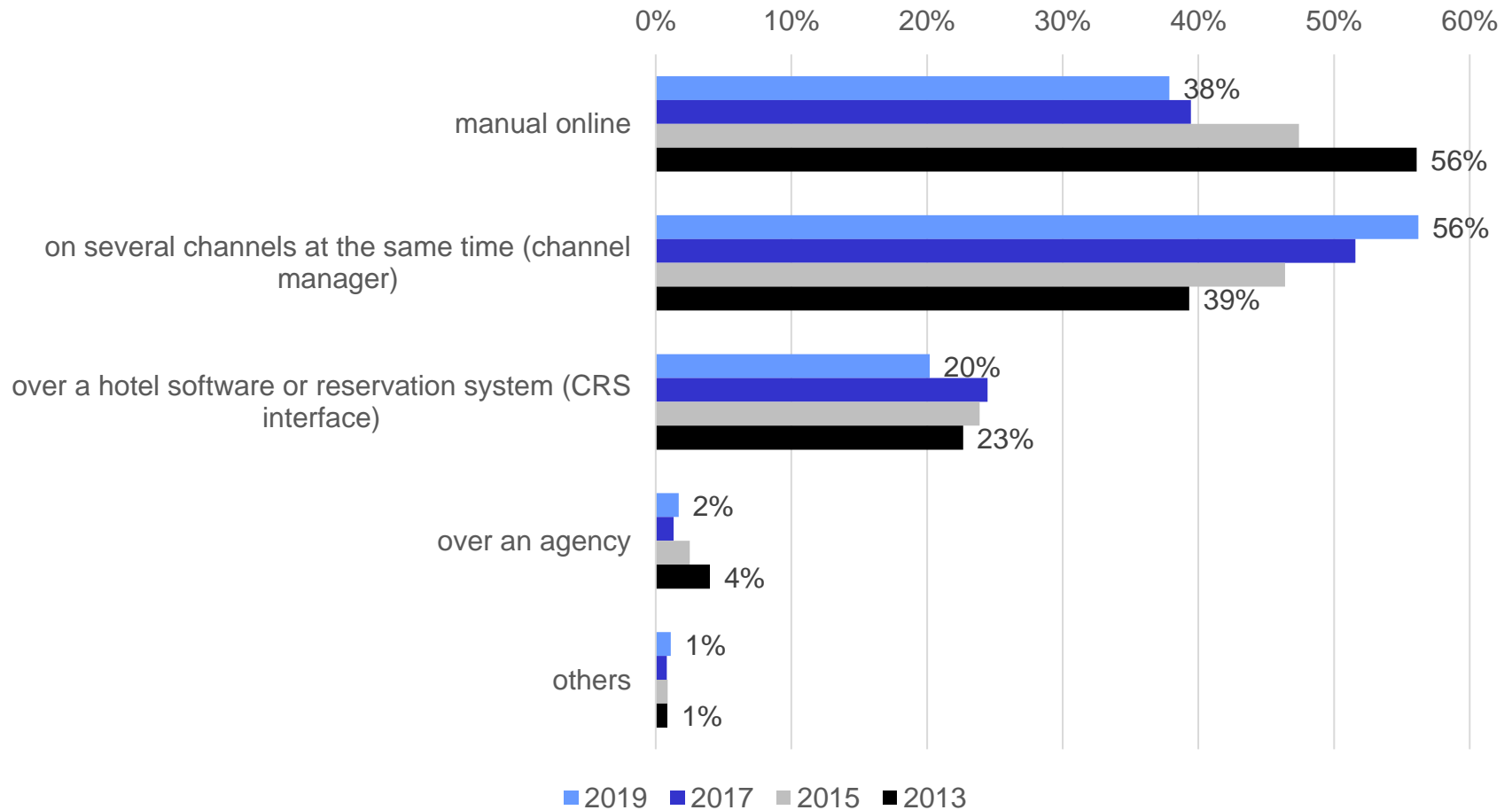


Based on unweighted (raw) sample data (n=585).

Distribution channel management

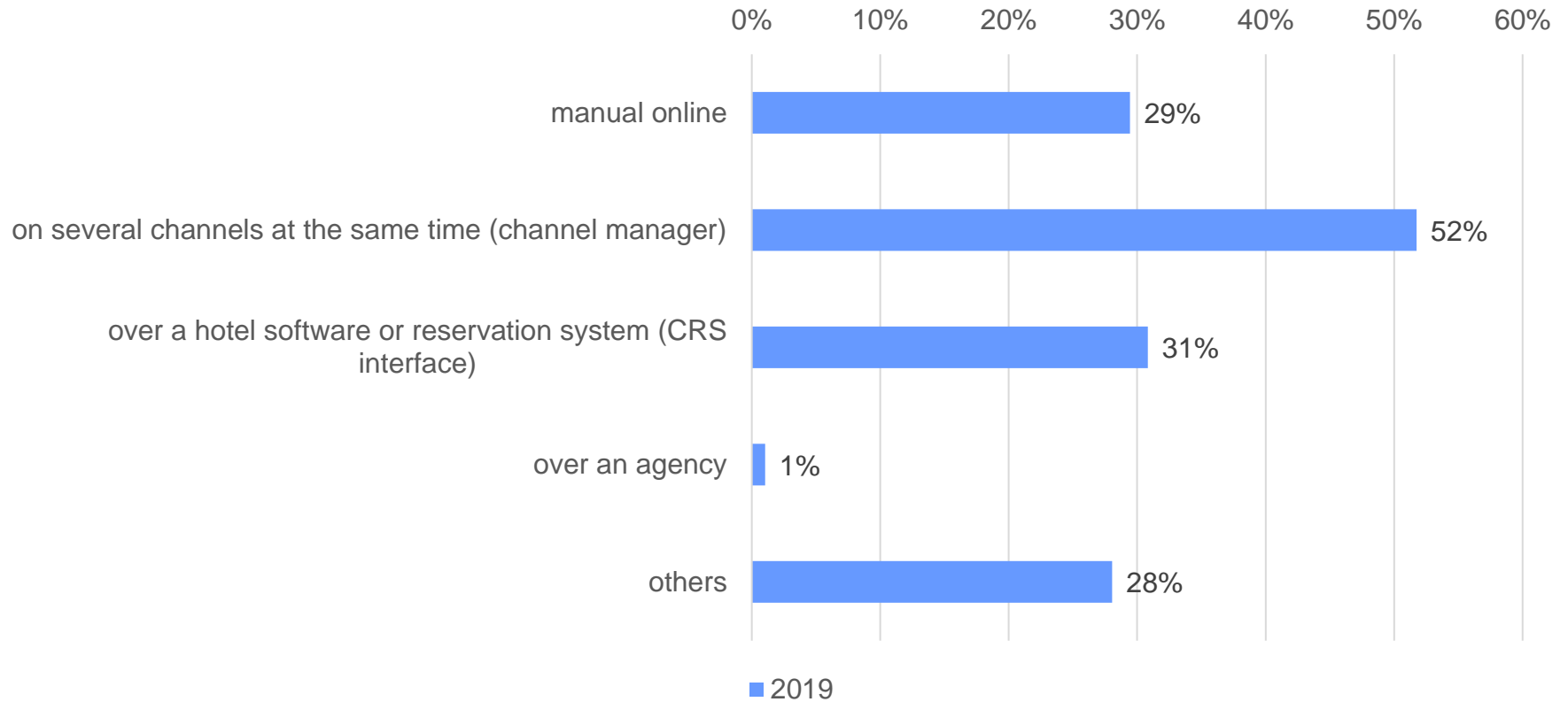


Europe (without data from France): How do you maintain your rates and availabilities on the online booking channels?



Based on unweighted (raw) sample data (2013-2019).

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

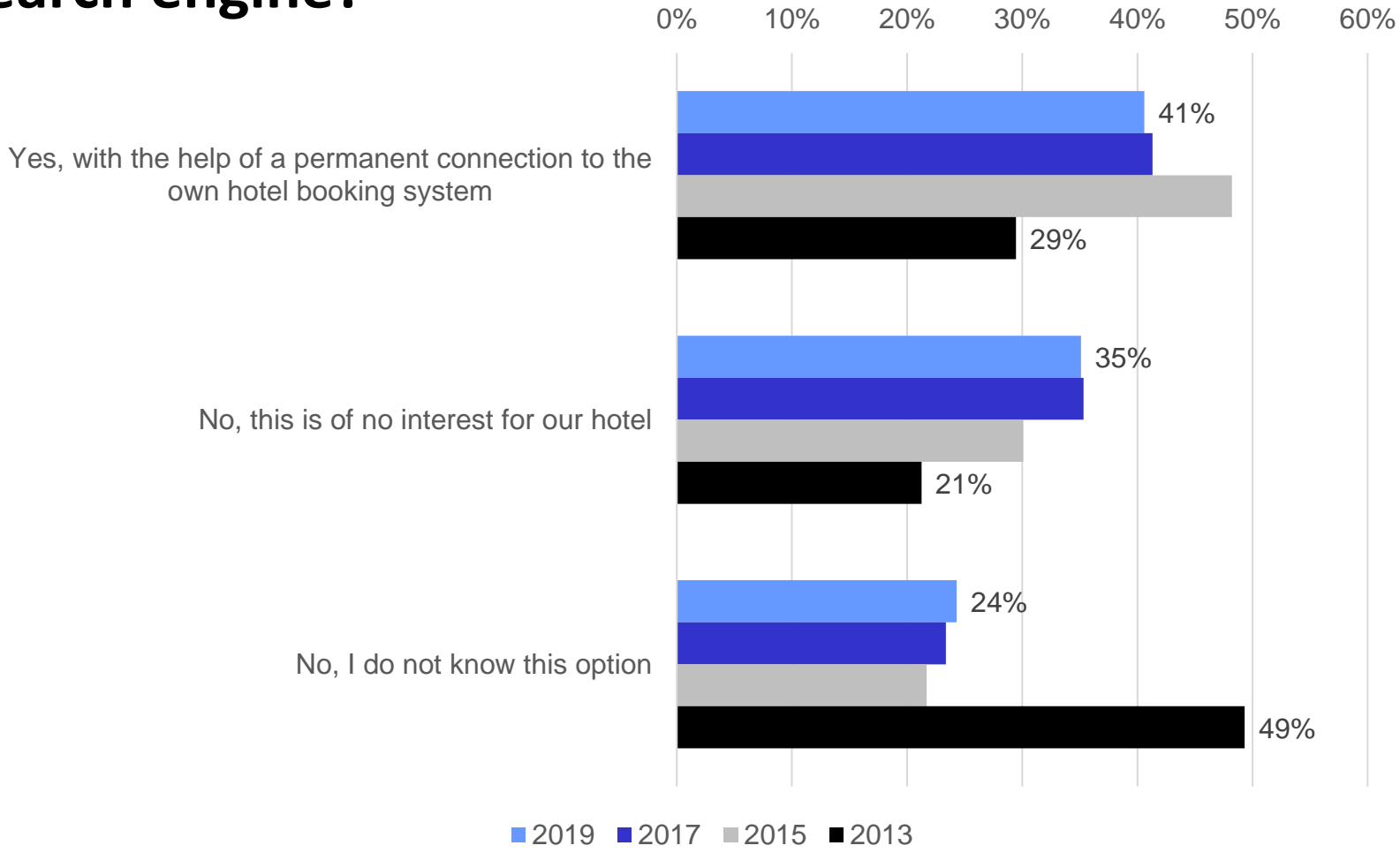


Based on unweighted (raw) sample data (n=574).

Use of meta-search engines

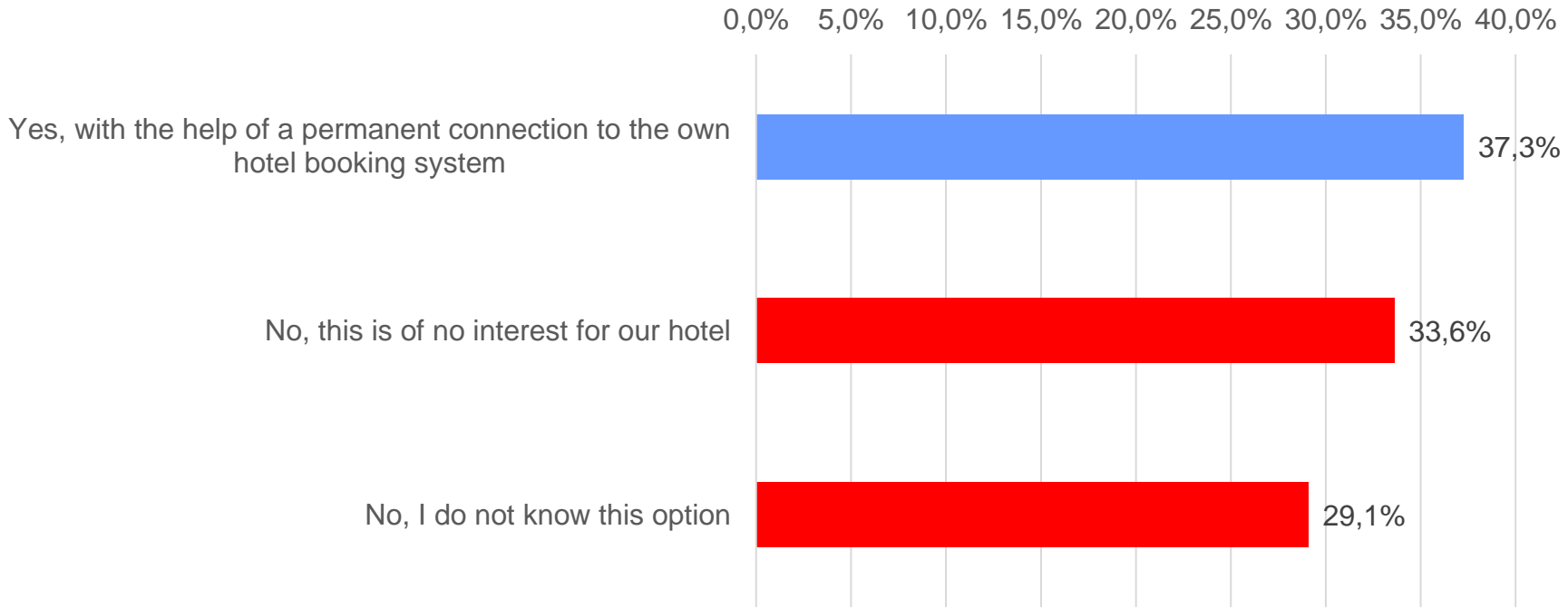


Europe (without data from France): Are your rates and availabilities accessible with a direct interface with a meta-search engine?



Based on unweighted (raw) sample data (2013-2019).

FRANCE: Are your rates and availabilities accessible with a direct interface with a meta-search engine?



- 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

Based on unweighted (raw) sample data (n=574).

Prof. Roland Schegg

University of Applied Sciences of Western Switzerland Valais (HES-SO Valais)

School of Management

Institute of Tourism (ITO)

TechnoPôle 3

CH-3960 Sierre/Siders, Switzerland

Tel: +41 (0)27 606 90 83

Mail: roland.schegg@hevs.ch

Twitter: @RolandSchegg

LinkedIn: ch.linkedin.com/in/rolandschegg/

Web: www.hevs.ch / www.etourism-monitor.ch / www.touobs.ch

Bachelor of Science HES-SO in Tourism in German, French and English



Annex 1: The Questionnaire (1)



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

Annex 1: The Questionnaire (2)

Country

- | | | | |
|--------------------------------------|-------------------------------|-----------------------------------|--------------------------------------|
| <input type="radio"/> Austria | <input type="radio"/> Finland | <input type="radio"/> Latvia | <input type="radio"/> Slovakia |
| <input type="radio"/> Azerbaijan | <input type="radio"/> France | <input type="radio"/> Lithuania | <input type="radio"/> Slovenia |
| <input type="radio"/> Belgium | <input type="radio"/> Georgia | <input type="radio"/> Luxembourg | <input type="radio"/> Spain |
| <input type="radio"/> Bulgaria | <input type="radio"/> Germany | <input type="radio"/> Malta | <input type="radio"/> Sweden |
| <input type="radio"/> Croatia | <input type="radio"/> Greece | <input type="radio"/> Netherlands | <input type="radio"/> Switzerland |
| <input type="radio"/> Cyprus | <input type="radio"/> Hungary | <input type="radio"/> Norway | <input type="radio"/> Turkey |
| <input type="radio"/> Czech Republic | <input type="radio"/> Iceland | <input type="radio"/> Poland | <input type="radio"/> United Kingdom |
| <input type="radio"/> Denmark | <input type="radio"/> Ireland | <input type="radio"/> Portugal | |
| <input type="radio"/> Estonia | <input type="radio"/> Italy | <input type="radio"/> Serbia | |

Annex 1: The Questionnaire (3)

A. Distribution channels of hotel

What was the percentage of overnight stays in 2019 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	<input type="text"/>	%
Direct - Mail / fax	<input type="text"/>	%
Direct - Walk-In (persons without reservation)	<input type="text"/>	%
Direct - Contact form on own website (without availability check)	<input type="text"/>	%
Direct - Email	<input type="text"/>	%
Direct - real time booking over own website with availability check	<input type="text"/>	%
Destination Marketing Organization (DMO) / trade associations	<input type="text"/>	%
National Tourism Organization (NTO)	<input type="text"/>	%
Tour operator / Travel agency	<input type="text"/>	%
Online Booking Agency (OTA)	<input type="text"/>	%
Hotel chains and cooperations with CRS	<input type="text"/>	%
Globale Distributionssysteme (GDS - Amadeus, Travelport incl. Galileo and Worldspan, Sabre)	<input type="text"/>	%
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	<input type="text"/>	%
Event and Congress organizer	<input type="text"/>	%
Social Media Channels	<input type="text"/>	%
other distribution channels	<input type="text"/>	%

Annex 1: The Questionnaire (4)

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

Calculate
SUM

If "other distribution channels", which ones:

Optional comments regarding the development of distribution channels in general:

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 2019. Please put in data as whole numbers, e.g. for 21.3% it would be 21. The sum should amount to 100%.

Agoda	<input type="text"/>	%
Airbnb	<input type="text"/>	%
Bergfex	<input type="text"/>	%
Booking.com	<input type="text"/>	%
BookNorway	<input type="text"/>	%
Trip.com (ex-CTrip)	<input type="text"/>	%
eBookers (Expedia)	<input type="text"/>	%
Destinia	<input type="text"/>	%
eDreams	<input type="text"/>	%
Expedia.com	<input type="text"/>	%
Hotel.ch	<input type="text"/>	%
Hotel.de	<input type="text"/>	%
Hoteliers.com	<input type="text"/>	%
Hotels.nl	<input type="text"/>	%
Hotels.com	<input type="text"/>	%
HRS	<input type="text"/>	%

Annex 1: The Questionnaire (6)

Hotelzon	<input type="text"/>	%
Lastminute.com	<input type="text"/>	%
Logitravel	<input type="text"/>	%
Orbitz Travel (Expedia)	<input type="text"/>	%
Tiscover	<input type="text"/>	%
Travelocity (Expedia)	<input type="text"/>	%
Voyage-Privé	<input type="text"/>	%
Voyage-SNCF.fr (excl. Rail)	<input type="text"/>	%
Invia (ab-in-den-urlaub.de, hotelreservierung.de etc.)	<input type="text"/>	%
other platforms	<input type="text"/>	%

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

**Calculate
SUM**

If "other platforms", which ones:

Optional comments regarding online booking channels (OTA):

Annex 1: The Questionnaire (7)

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

How have the (standard) commission rates of your most important online booking platforms developed over the last 3 years?

- Increased Stayed the same Decreased

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

Do you use the online payment of Booking or Expedia (Expedia Collect bookings)?

- Yes No Do not know

If yes, how many percent of the bookings are paid directly (by the guest) to the OTA?

	0-9%	10-19%	20-29%	30-39%	40-49%	50-59%	60-69%	70-79%	80-89%	90-99%	100%
Booking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expedia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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?

D. General Information about your hotel

Seasonal opening hours

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

Is your hotel classified (hotel stars)?

- Yes No

Star classification

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

Size of hotel (number of hotel rooms)

How many overnight stays did you register in 2019?

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

How many overnight stays did you register in 2019? (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

Annex 1: The Questionnaire (10)

Place

- City with more than 250'000 inhabitants City between 50'000 and 250'000 inhabitants City between 10'000 and 50'000 inhabitants small city (less than 10'000 inhabitants)

Location

- seaside alpine/mountain region rural region other location

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

- No Yes, hotel chain Yes, hotel cooperation

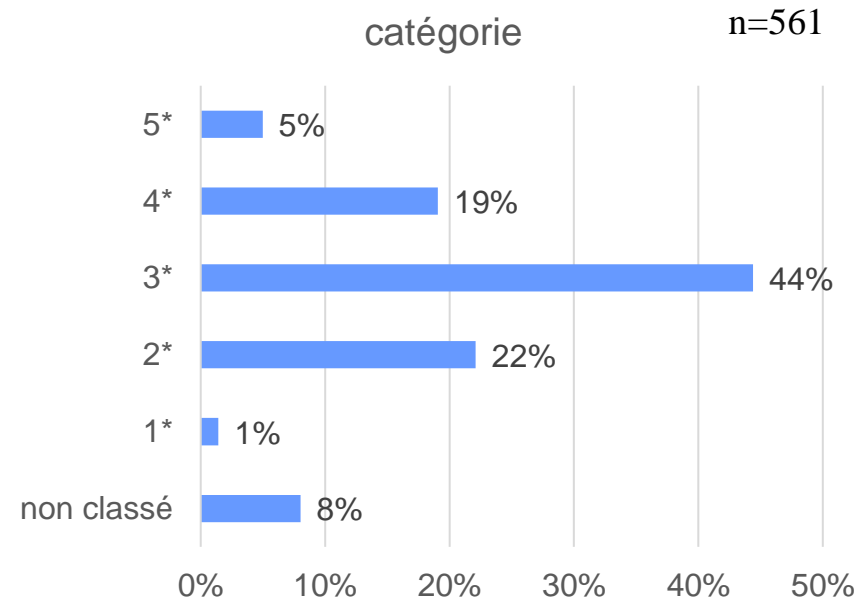
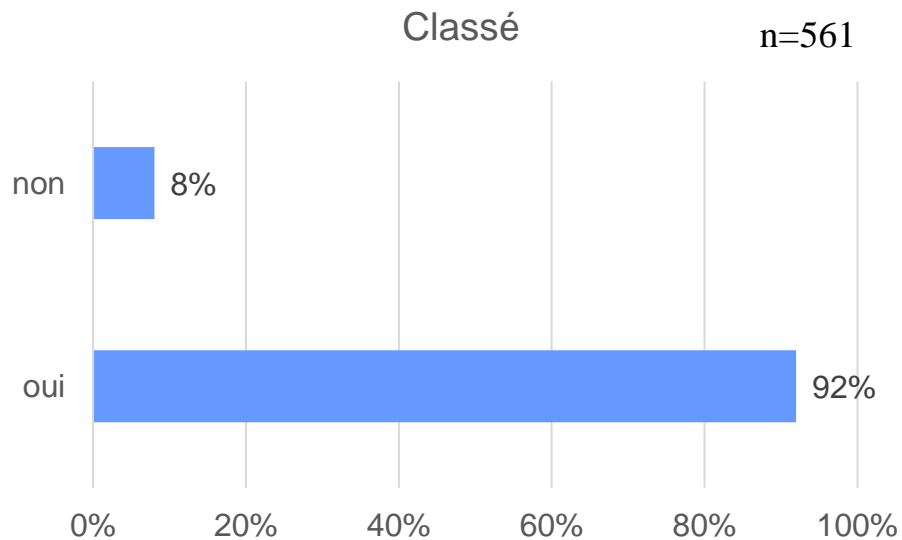
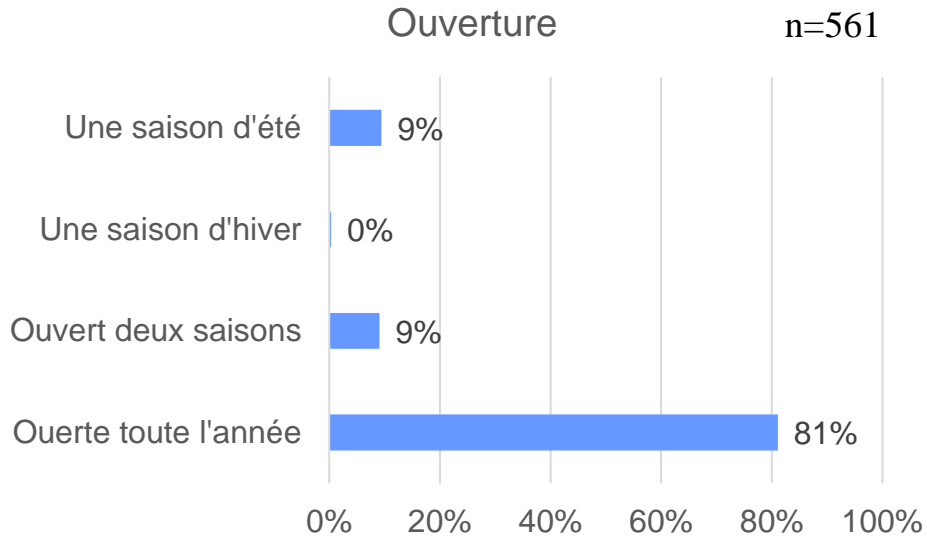
If you wish to receive an abstract of our final report, please write your email address below.

 **SAVE RESPONSES**

A BIG THANK YOU FOR YOUR VALUABLE COLLABORATION!

Annex 2: Sample characteristics

FRANCE (1)

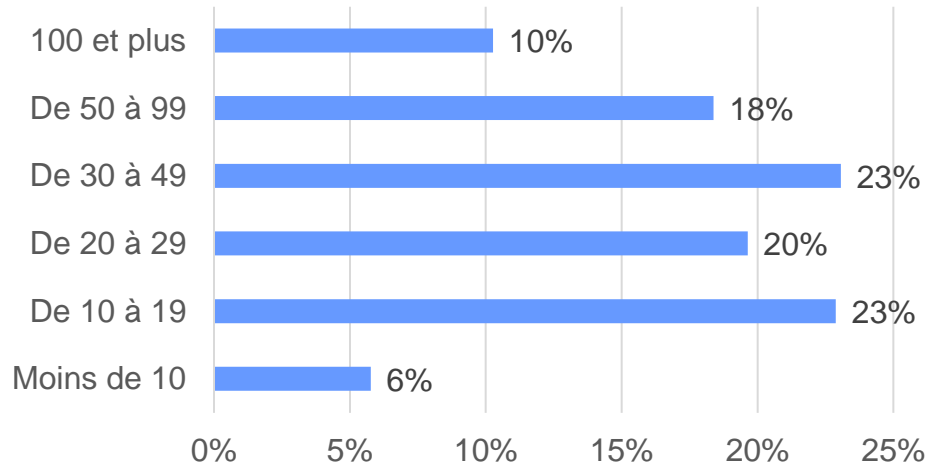


Annex 2: Sample characteristics

FRANCE (2)

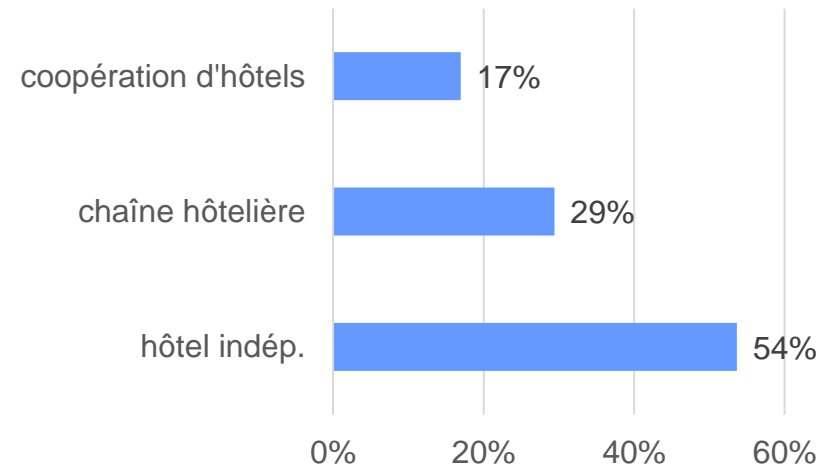
Nombre de chambres

n=555, médiane=30



Type d'hôtel

n=561



Segment de client principal

n=561

