

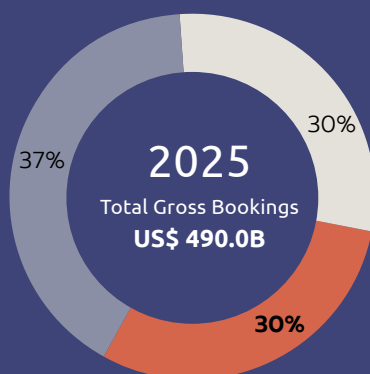
A GLANCE AT THE HOTEL DISTRIBUTION GLOBAL LANDSCAPE

Whatever the Market, Less Than 1 Booking Out of 2 is Done Through an OTA

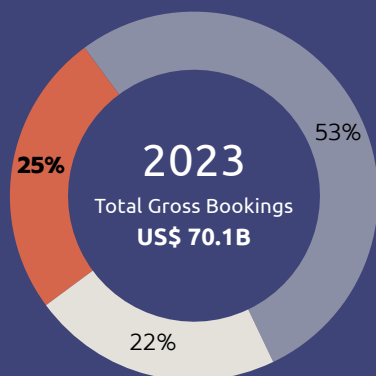
Total Gross Bookings (US\$B) and Share by Channel (%)



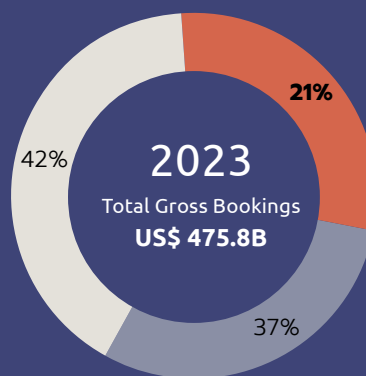
ASIA PACIFIC



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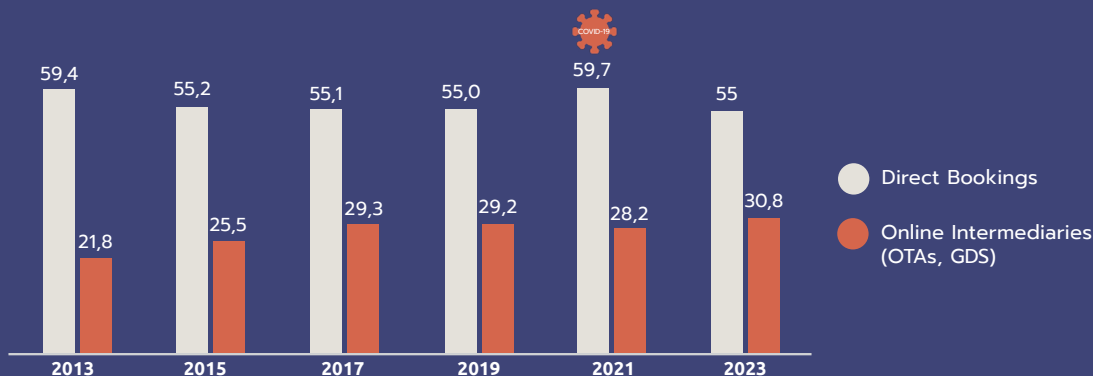
UNITED STATES



Asia Pacific: 2025 projected. 2021 projected for India. Total does not add to 100% due to rounding. Source: Phocuswright's Asia Pacific Travel Market Report 2021-2025. Latin America: OTA bookings express the transaction value of travel sold via the OTA channel by suppliers in the Latin America. 2027 projected. Source: Phocuswright's Latin America Travel Market Report 2023-2027. USA: Phocuswright's US Travel Market Report 2023-2027.

OTAs account for only a fraction of global hotel bookings. Across all regions, data confirms that while OTAs are important facilitators in the travel market, they do not hold a dominant market share.

Evolution of direct bookings and bookings via online intermediaries in Europe 2013-2023



Values from overall unweighted sample. Market shares in % of overnights. Source: European Hotel Distribution Study 2024, HORTEC

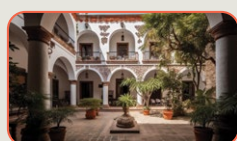
As Chains rose, Independent Hotels Struggle in the Accommodation Markets

Chainification of the U.S. accommodation market

U.S. hotel room share in 1990 and 2022, by accommodation type.

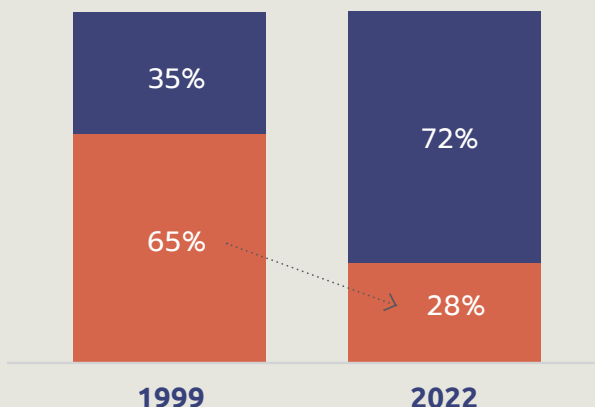


● Chain hotels



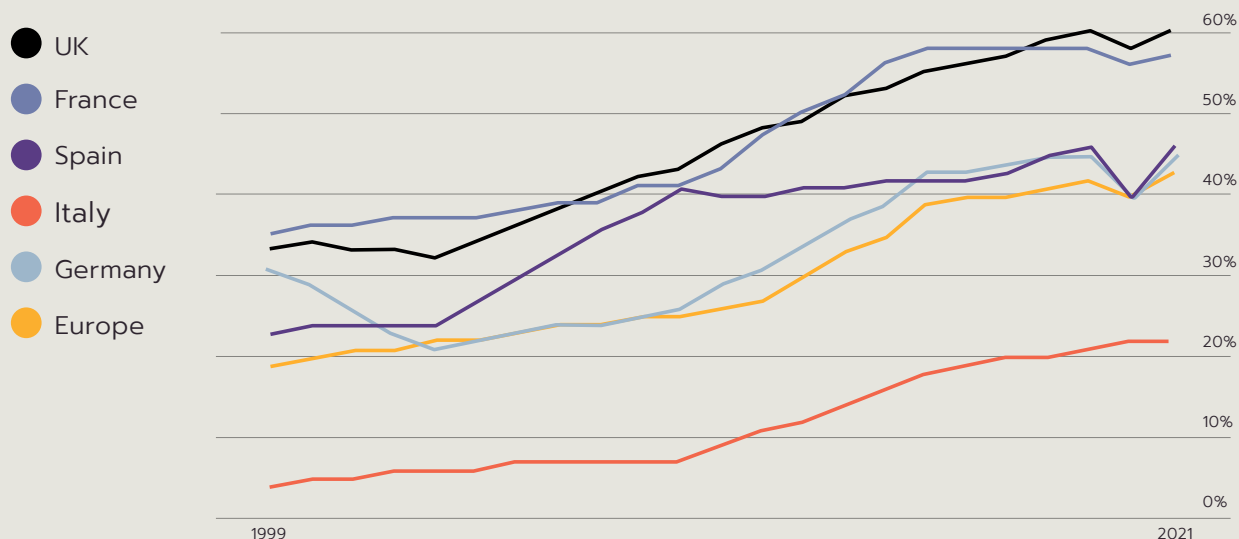
● Independent hotels

Source: STR, Skift Research



The U.S. accommodation market has seen a dramatic shift in the past three decades, from 65% independent hotels in 1990 to just 28% in 2022. Chain hotels now dominate the landscape with over 70% of the room share.

Hotel chain penetration in main European countries



Note: Hotel chain penetration based on the number of rooms for accommodations with at least 25 rooms per property. Source: Phocuswright

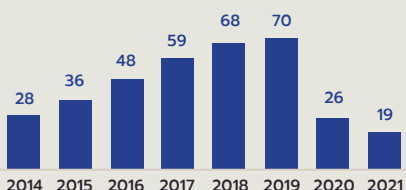
This trend towards chainification has accelerated as larger brands expand through franchising and consolidate market presence. These large chains typically operate within a closed ecosystem, where franchisees pay upfront fees to join and must follow strict brand standards. In contrast, OTAs offer an open-access, commission-based model that allows any hotel, regardless of size or affiliation, to compete for visibility and bookings without upfront costs.

OTAs Give Small Hotels a Global Stage

OTAs help hotels get more clients across all major regions. And they do it mostly for SME hotels, which are unable to match the marketing resources of global hotel chains and can rely on OTAs to be visible on the global stage.

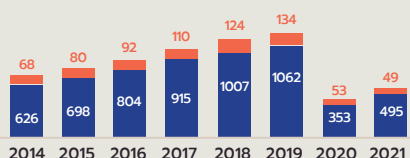
Extra nights generated by OTAs in APAC

Millions of room nights (2014–2021)



Extra nights generated by OTAs in Europe

Millions of room nights (2014–2021)



Extra nights generated by OTAs in North America

Millions of room nights (2014–2021)

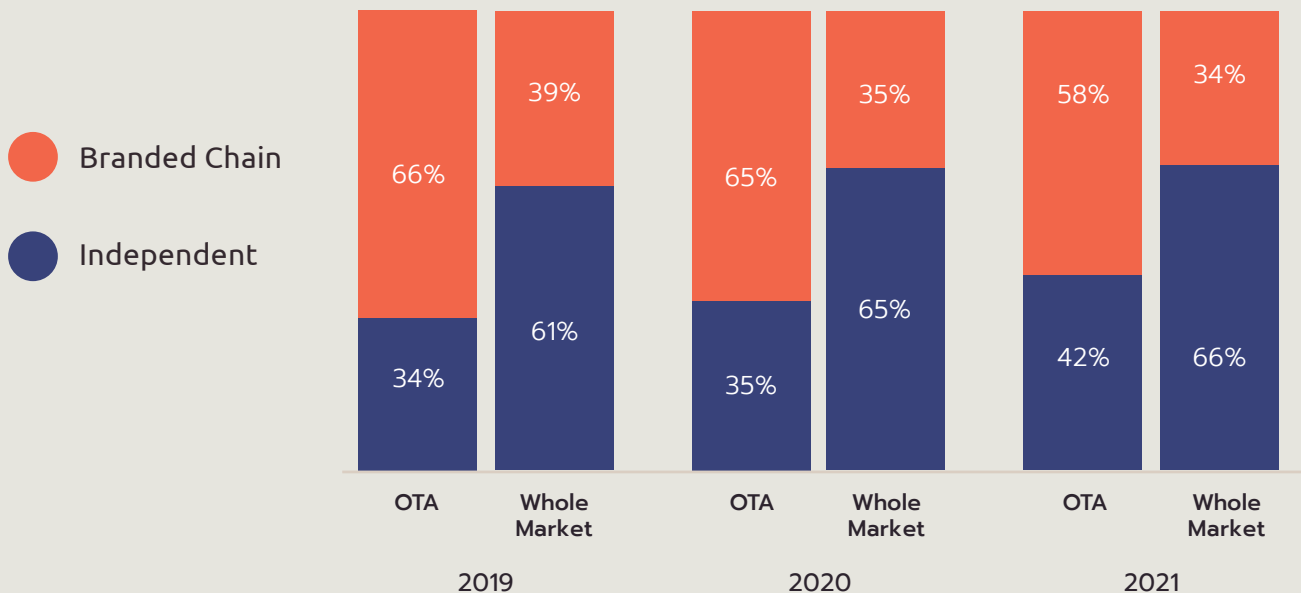


● Counterfactual OTA footprint ● Extra nights generated by OTAs

Source: Oxford Economics

OTAs channel customers to independent hotels

In 2021, 58% of OTAs' sales were for independent hotels. Only 34% for the market as a whole.



Source: Oxford Economics

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