Strong Growth of Online Travel Agencies (OTA) in the Swiss Hotel Industry in 2016

April 1, 2017

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Direct distribution important, but still decreasing

- **Direct bookings** (telephone, fax, walk-ins, e-mail, Web form) without intermediaries are still the dominant channels in 2016 for hotels in Switzerland, even though their proportion has been steadily decreasing for the last couple of years.
  - In 2016, **58.3% of the overnights** in Switzerland were generated via direct sales channels, compared with 63.7% in 2013 and 60.3% in 2015. Between 2002 and 2010 this proportion was clearly above 70%.
  - According to our projections, by 2020, less than 50% of bookings will be made directly at hotels, if current trends continue.

Real-time booking still on the rise

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- Overall **traditional booking** channels such as telephone, letter or fax, as well as sales through tourism partners have been declining for 10 years, yet we see a progression for two channels.
  - Market shares of **tourism organisations** have slightly increased in 2016 and is situated at **2.8% of the overnights** (mainly due to a an increase of the market share of the national tourism organisation, i.e. Swiss Travel Center STC) in Switzerland compared to 2.1% overnights in 2015 (but remember: back in 2002, nearly 10% of bookings were made through tourism organisations).
  - **Internet Booking Engine (IBE)** : The efforts undertaken by hoteliers to improve their visibility on the Internet show also some positive signs. The share of **real time bookings on hotels' own websites continues to increase** and generated **8.2 % of overnights** in 2016 (compared with 7.5% in 2015).

Growing Shares of Online Distribution Channels

- **Online distribution** has become an important sales channel for the Swiss hotel industry. Overall, nearly **40% of overnights** are generated real-time through online channels (OTA, GDS, IBE).
- **OTAs are clearly dominant (27.3% of overnights compared to 20.6% in 2015).** They have multiplied their market shares in the last few years and seem to grow continuously. The strong increase of OTAs is likely due to the technological advantage (e.g. mobile booking) and online marketing efforts undertaken by the three major market players (Priceline, Expedia, HRS) to strengthen their presence (e.g. Priceline spent $ 3.5 billion on performance marketing in 2016*).
- **Four out of ten hotels generate more than 30% of overnights via OTA** (27% in 2015) and 15% hotels have OTA sales of more than 50% of overnights. This confirms the **increasing dependence** that hotel establishments have on global online intermediaries and the increasing importance of the Internet for hoteliers in general.

* https://www.tnooz.com/article/priceline-group-3-5-billion-advertising-2016/

OTA Market Shares by Hotel Segment

- 5 star hotels have a significant lower OTA share (16%) than all other hotel categories, probably due to a broader range of channels used.
- Larger hotels (>50 rooms) have smaller OTA shares (22%) than smaller hotels (<50 rooms) with OTA shares of 31%.
- There are no significant differences in relation with the location of the hotels. OTA market shares in city hotels are similar to those in resort hotels.
- Even though chain hotels and properties of hotel cooperation have slightly lower OTA market shares compared to independent hotels, differences are not significant.

The OTA-hotel commercial relationship

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- With respect to the **commission level,** our data indicate based on responses of 295 hotels an **average commission level of 13.6%** (median value at 13%). Every fourth (26.8%) property has an average commission level of 15% and 8% of the hotels pay more than 15%.
- **3.9%** of the surveyed Swiss hotels report that they have received a **reduction of OTA commissions** since 2015, 9.4% of hotels saw an increase and for 86.8% of properties there was no change.
- Based on responses of 258 hotels, the share of OTA commissions in the overall cost structure could be estimated. The **average OTA distribution costs are at 7.8%** (median value at 7%) which is a substantial proportion when compared to the 42% labour costs in an average Swiss hotel or the 3.4% of marketing costs. For 39% of properties these distribution costs are between 10% and 20%.

The Costs of OTAs

- With a market share of 27.3% OTAs generated **over 1.1 billion CHF of gross bookings in 2016** in Switzerland.
- The total amount of **commissions paid by hotels in Switzerland to OTAs** reached in 2016 an **estimated amount of 152 million CHF**.
- The average Swiss hotel spends, according to our estimation, nearly **34'000 CHF** per year on OTA commissions (roughly **1100 CHF per room** and year).

The OTA landscape in Switzerland

- In 2016, **Booking.com, Expedia and HRS together accounted for 93% of the online travel platform market**. Booking.com has reinforced its market position in Switzerland (73.3% vs. 71% in 2015), while HRS (7.8%) continues its decline which has been observed over the last few years. Booking.com, a company acquired by the American Priceline Group, has grown very strongly in the last five years (relative market share of 53% in 2011).
- Relative OTA market shares of Priceline, Expedia and HRS in different hotel segments:
  - Priceline has higher market shares among 1 star to 3 star hotels compared to the luxury market, whereas HRS is strong in 3-4 star hotels and Expedia in the luxury segment.
  - Expedia is more popular with chain hotels and hotel cooperations than independent hotels, whereas Priceline is more used by independent hotels than by chain hotels.

Rate Parity Clause Enforcement by OTAs

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- **70% of properties** indicate that **OTAs have not required adaption measures related with the rate parity rules**. In 30% of cases OTA asked hotels to change rates; either in a written communication (16.1%) or directly via phone (13.9%).
- The potential penalties mentioned by OTAs are a drop in ranking on the search result pages (16.3%), exclusion of the preferred program (6.3%) or the platform (6.3%).

Distribution Technology: Channel Management and IBE

- **Two third** of Swiss hotels use a **channel manager** and/or **one fourth a CRS system** to maintain rates and availabilities in the different distribution channels.
  - More than one out of four hotels (28.2%) still manages distribution channels in a **manual way**. This proportion is higher in 1-3 star hotels and in independent hotels than other hotel segments.
  - **Chain hotels** and properties associated with hotel cooperations use mainly channel managers and/or CRS systems.
- **Three out of four hotels** (74.5%) use already a **Internet Booking Engine (IBE)** on their website while 6.9% of properties plan to implement such a system in 2017.
  - The use of IBE is significantly higher in city hotels (84.8%), in 4-5 star hotels (>85%), in hotels with more than 50 rooms (>88%), in chain hotels (85.7% and properties of hotel cooperations (91.3%).

Distribution Technology: Property Management Systems (PMS)

- Overall 28 different PMS systems are used by the hotels in our sample.
- Despite the large variety of systems observed, **four PMS providers/systems** dominate the market (71.7% market share) : **Protel** (31.9%), **Oracle - Fidelio / Opera** (24.6%), **infor/hogatex** (8.4%) and **Base7Booking** (6.8%).

Impact of Airbnb on Hotel Sector

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- **One out of seven hotels (13.5%)** is resp. was offering rooms on **Airbnb**. 6.9% of hotels report some success with this alternative distribution channel whereas 4.1% of properties are very happy with the success and only 2.5% had no success at all. With the exception of 5 star hotels, hotels in all other categories have tried to use Airbnb.
- The **impact of Airbnb on the overnights seems to be difficult to evaluate** for hotels. An important part (42.6%) of hotels does not know how Airbnb impacted their business whereas 38.5% of respondents do not see any impact yet. Nevertheless **13.9% of hotels perceive a weak decrease of overnights due to Airbnb**. This proportion is significantly higher in city hotels (24.8%), in 3 star hotels (19.4%) and in big hotels with more than 100 rooms (29%).

The survey

The survey: background

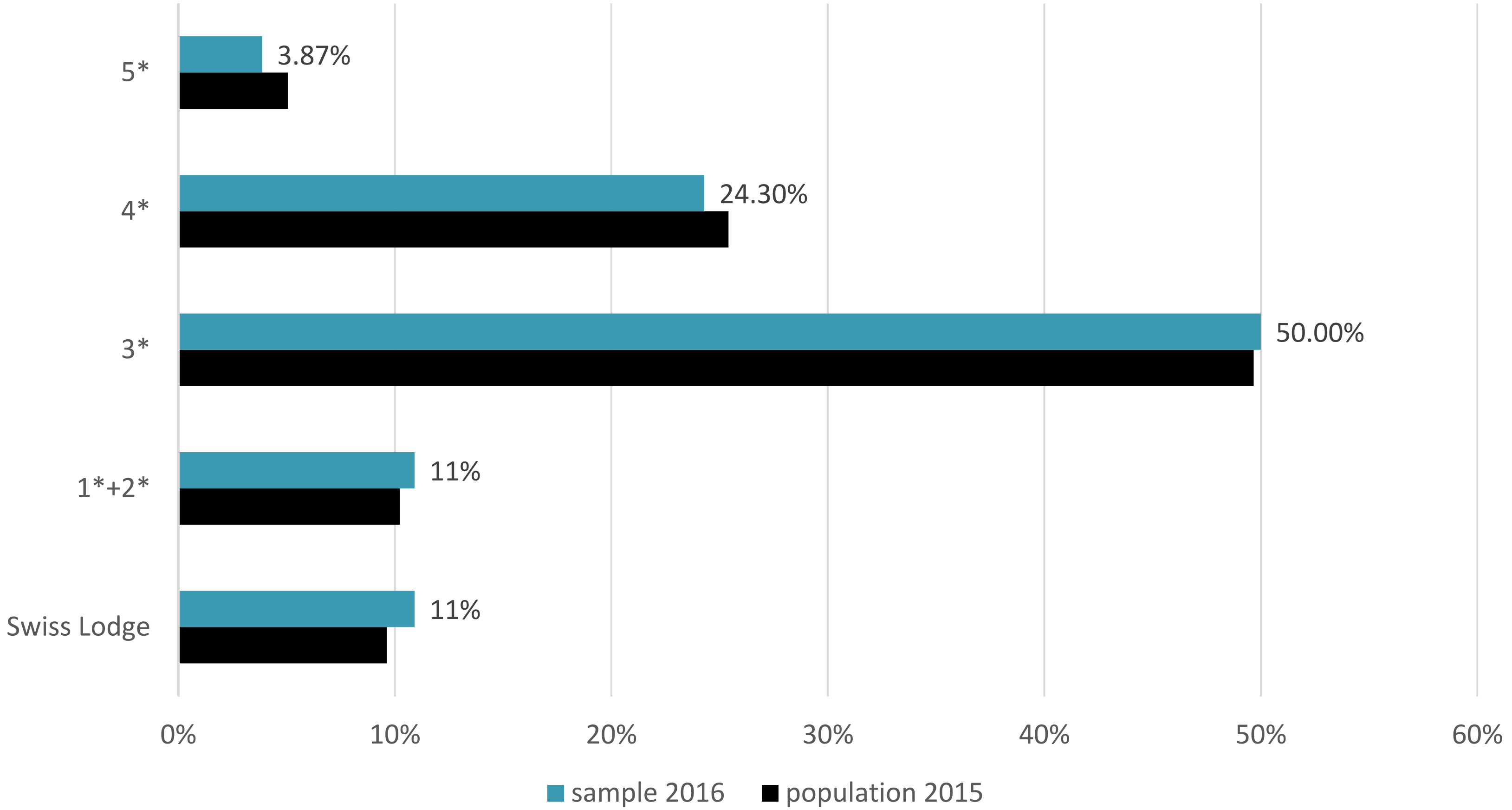
- Since 2003, a standard questionnaire has been used by the Institute of Tourism of the HES-SO Valais-Wallis in Sierre for the analysis of the distribution landscape in the Swiss hotel industry allowing to monitor the evolution of hotel distribution channels over time.
  - ➢ Results of former studies can be found here: https://etourism-monitor.ch

- In order to draw the picture of the current situation (i.e. reference year 2016) of distribution channels (online as well as offline) within the Swiss hotel industry, hotelleriesuisse, the Swiss hotel association, wanted to conduct an online survey.

The survey: the sample

- 1964 member hotels of hotelleriesuisse and 1691 hotels from the Swiss hotel database (https://swisshoteldata.ch) have been contacted in February 2017 in order to get information for the **reference year 2016**.
- In the end 360 valid responses could be collected which corresponds to a response rate of 9.8%.
- The sample reflects the structure of members of hotelleriesuisse regarding the classification of hotels in Switzerland (see next slide).

Sample structure: classification



- Population statistics according to “Jahrbuch der Schweizer Hotellerie 2016”. hotelleriesuisse

The questionnaire

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- The online questionnaire (in German & French) asked for market shares of different direct and indirect distribution channels (in terms of **overnights** as in our former study for the reference years 2013 and 2015) as well as the specific market shares of the OTAs (such as Booking.com, Expedia, and HRS).
- Further questions queried commission and distribution costs and looked how hoteliers manage online distribution channels and distribution technologies. Another aspect covered is the perceived impact of Airbnb on the hotel sector.
- The final part comprises questions covering characteristics of the hotel property (star rating, the size of the hotel in terms of rooms offered, its location, etc.).

➢ See **annex** for a copy of the **questionnaire** in German.

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/

Distribution channels

Market shares (overnights) of distribution channels 2016

	Members hotelleriesuisse (n=243)		Other hotels (n=86)		Total sample (n=329)			
	Market share		Market share		Market share		**Conf. interval**	
Direct - Phone	16.6	56.5	18.1	63.0	17.0	58.3	16.0	18.0
Direct - Mail / fax	1.6		0.9		1.4		1.1	1.7
Direct - Walk-In (persons without reservation)	4.4		5.7		4.7		4.3	5.2
Direct - Contact form on own website (without availability check)	4.8		8.8		5.8		4.8	6.8
Direct - Email	20.4		23.4		21.2		19.7	22.5
Direct - real time booking over own website with availability check	8.9		6.1		8.2		7.3	9.0
Destination Marketing Organization (DMO)	1.4	2.8	1.6	2.4	1.4	2.7	1.2	1.7
National Tourism Organization (NTO)	1.4		0.8		1.3		1.0	1.6
Tour operator / Travel agency	3.9	9.3	3.6	4.8	3.8	8.1	3.2	4.8
Hotel chains and cooperations with CRS	0.9		0.1		0.7		0.4	1.0
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.4		0.3		1.8		1.4	2.2
Event and Congress organizer	2.2		0.9		1.8		1.4	2.2
Online Booking Agency (OTA)	26.9	30.1	28.2	28.6	27.3	29.7	25.4	29.0
Global Distribution Systems (GDS)	2.9		0.2		2.2		1.8	2.6
Social Media Channels	0.3		0.2		0.3		0.1	0.6
Other distribution channels	1.2	1.2	1.2	1.2	1.2	1.2	0.8	1.6

Other channels mentioned: Airbnb, Hotel-Card, gift vouchers, etc.
Confidence intervals (bootstrap) are stated at the 95% level.

Market shares (overnights) of distribution channels: 2015 vs 2016

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	2015 Members hotelleriesuisse (n=226) Market share		2016 Members hotelleriesuisse (n=243) Market share		2016 Total sample (n=329) Market share		Delta Members hotelleriesuisse 2016-2015 Change	
Direct - Phone	19.9	60.7	16.6	56.5	17.0	58.3	-3.3	-4.2
Direct - Mail / fax	2.0		1.6		1.4		-0.5	
Direct - Walk-In (persons without reservation)	4.7		4.4		4.7		-0.4	
Direct - Contact form on own website (without availability check)	5.0		4.8		5.8		-0.3	
Direct - Email	21.6		20.4		21.2		-1.2	
Direct - real time booking over own website with availability check	7.5		8.9		8.2		**1.4**	
Destination Marketing Organization (DMO)	1.4	2.1	1.4	2.8	1.4	2.7	0.0	0.7
National Tourism Organization (NTO)	0.7		1.4		1.3		**0.7**	
Tour operator / Travel agency	4.6	10.3	3.9	9.3	3.8	8.1	-0.7	-1.0
Hotel chains and cooperations with CRS	1.1		0.9		0.7		-0.2	
Wholesaler (e.g. Hotelbeds, Tourico, Gulliver, Transhotel, etc.)	2.3		2.4		1.8		0.1	
Event and Congress organizer	2.3		2.2		1.8		-0.1	
Online Booking Agency (OTA)	20.6	24.3	26.9	30.1	27.3	29.7	**6.3**	5.8
Global Distribution Systems (GDS)	3.4		2.9		2.2		-0.5	
Social Media Channels	0.4		0.3		0.3		0.0	
Other distribution channels	2.5	2.5	1.2	1.2	1.2	1.2	-1.3	-1.3

OTA dependence of hotels

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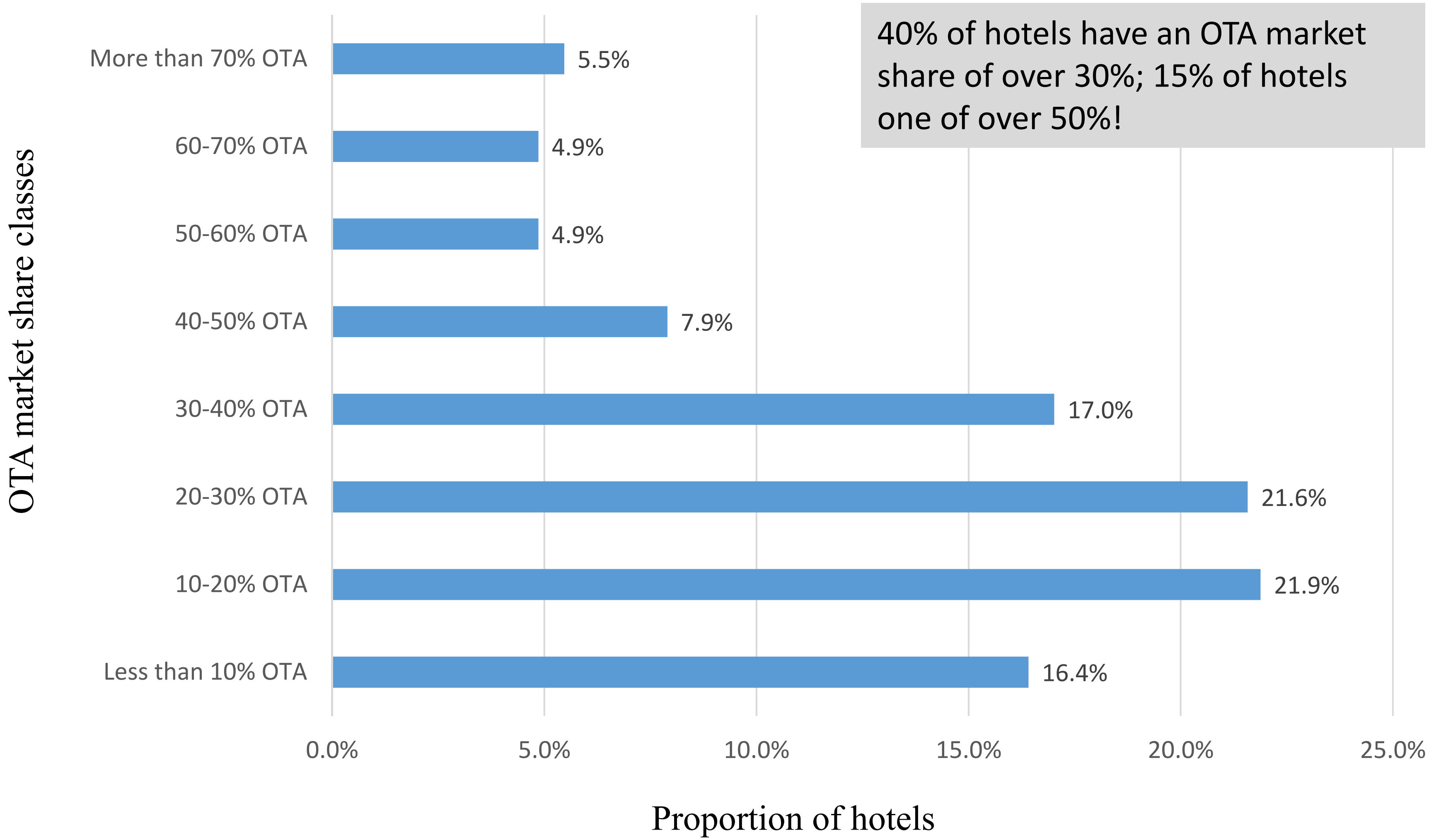

OTA market shares versus hotel segments

								p-value
Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***			
	27.7%	28.4%	17.5%	24.3%	***27.3%***			*78.50%*
Star category	1*	2*	3*	4*	5*	Swiss Lodge	***Total***	
	31.7%	37.9%	28.3%	24.4%	16.4%	24.3%	***27.3%***	*7.50%*
Size of hotel (rooms)	Less than 10 rooms	10-20 rooms	20-30 rooms	30-50 rooms	50-100 rooms	More than 100 rooms	***Total***	
	28.4%	28.5%	37.5%	28.4%	22.6%	21.6%	**27.26%**	*0.30%*
Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***				
	28.2%	24.5%	26.1%	***27.3%***				*65.20%*
Location of hotel	City	Resort / Mountain	Other	***Total***				
	28.9%	27.2%	25.7%	***27.3%***				*74.90%*

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

Direct booking channel market share versus hotel segments

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								p-value
Seasonality	open all year round	two seasons business	one season business (winter)	one season business (summer)	***Total***			
	57.2%	57.8%	71.0%	66.2%	***58.2%***			*29.50%*
Star category	1*	2*	3*	4*	5*	Swiss Lodge	***Total***	
	66.7%	54.8%	58.3%	51.7%	49.3%	70.2%	***58.2%***	***0.70%***
Size of hotel (rooms)	Less than 10 rooms	10-20 rooms	20-30 rooms	30-50 rooms	50-100 rooms	More than 100 rooms	***Total***	
	66.6%	65.2%	54.5%	59.8%	53.6%	50.3%		***0.40%***
Type of hotel	Independant hotel	Hotel chain	Hotel cooperation	***Total***				
	59.8%	50.4%	55.9%	***58.2%***				*13.90%*
Location of hotel	City	Resort / Mountain	Other	***Total***				
	51.7%	59.2%	65.0%	***58.2%***				***0.1%***

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

Trends in Booking Channels in Swiss Hotels 2002-2016

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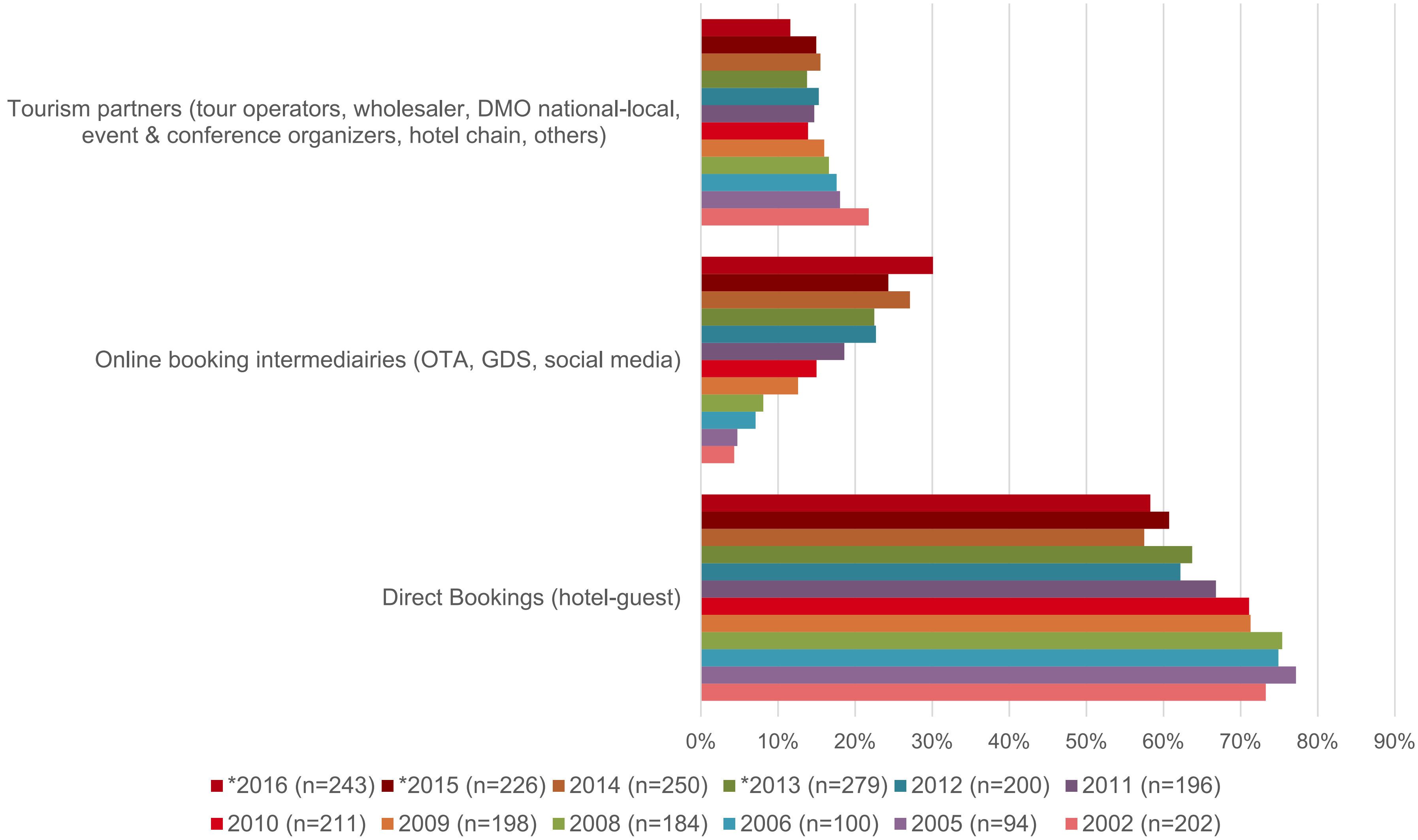
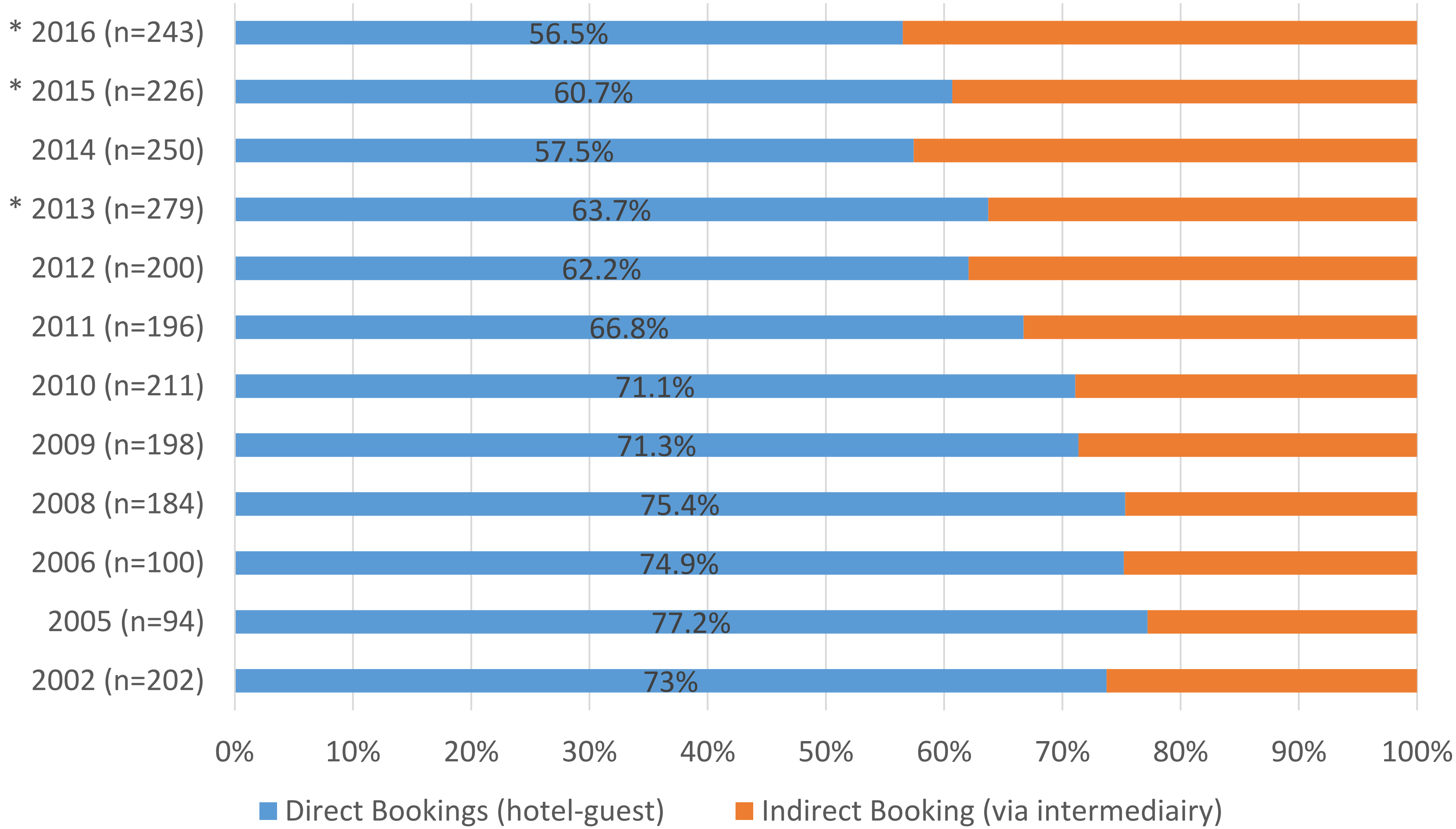


Market shares in % of ***bookings*** for 2002-2012 & 2014 and in % of ***overnights*** in *2013, *2015 and 2016*!

Distribution Trends in the Swiss Hotel Sector 2002-2015



Market shares in % of ***bookings*** for 2002-2012 & 2014 and in % of ***overnights*** in *2013, *2015 and 2016*! Sample: members of hotelleriesuisse

OTA Landscape

OTA Landscape Switzerland and Germany 2016

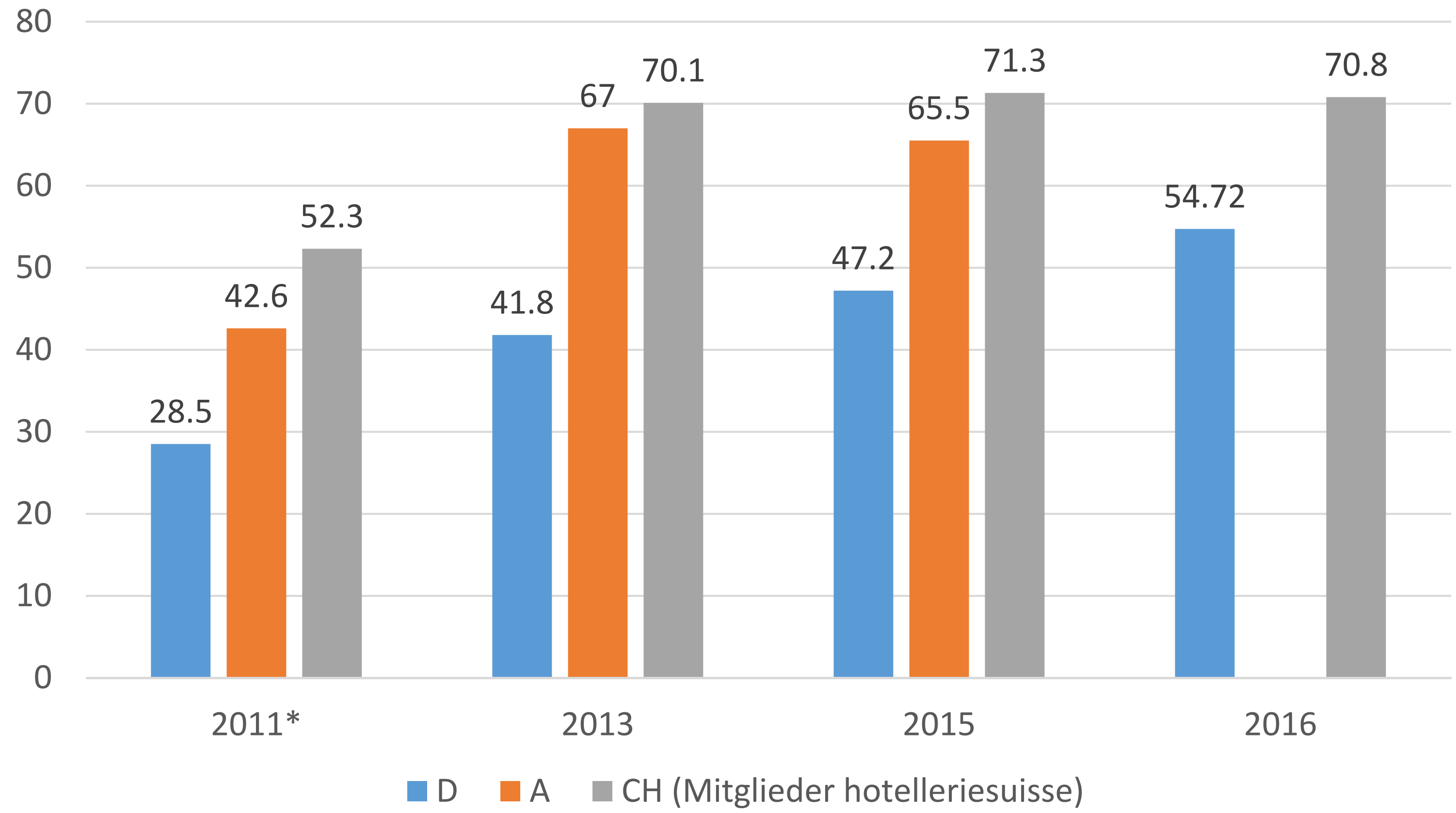
	Priceline	Expedia	HRS	**Total (%)**
D	54.7	10.7	30.3	**95.8**
CH (total sample)	73.3	11.9	7.8	**92.9**
CH (hotelleriesuisse)	70.8	14.1	7.6	**94.1**

priceline.com
Booking.com
agoda
Expedia
Hotels.com
ORBITZ ebookers
venere.com
HRS The Hotel Portal
tiscover
hotel.de

OTA Landscape DACH 2015

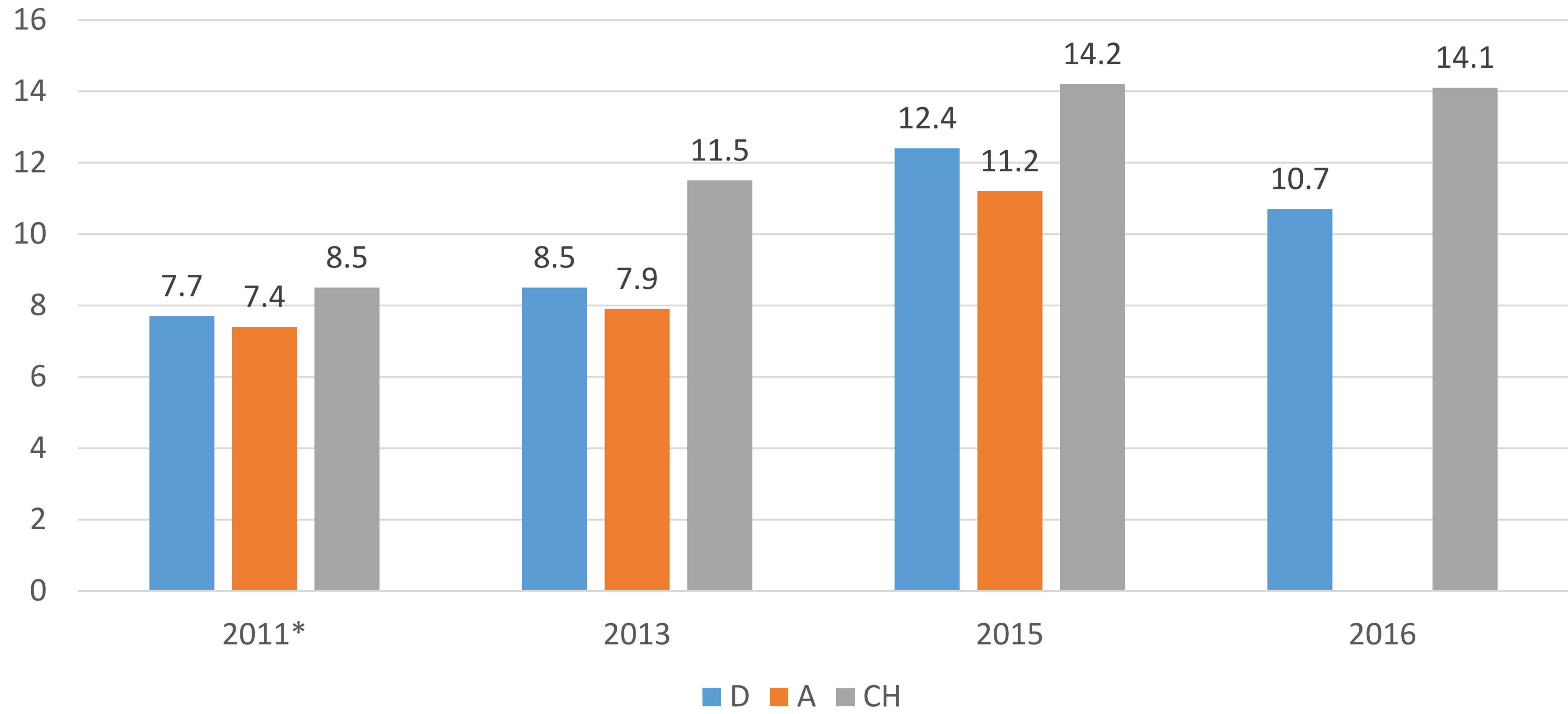
	Priceline	Expedia	HRS	**Total (%)**
D	47.2	12.4	34.6	**94.2**
A	65.5	11.2	12.8	**89.5**
CH (hoteleriesuisse)	71.3	14.2	8.6	**94.1**

Evolution OTA Landscape DACH 2011-2016: Priceline (booking.com / Agoda)



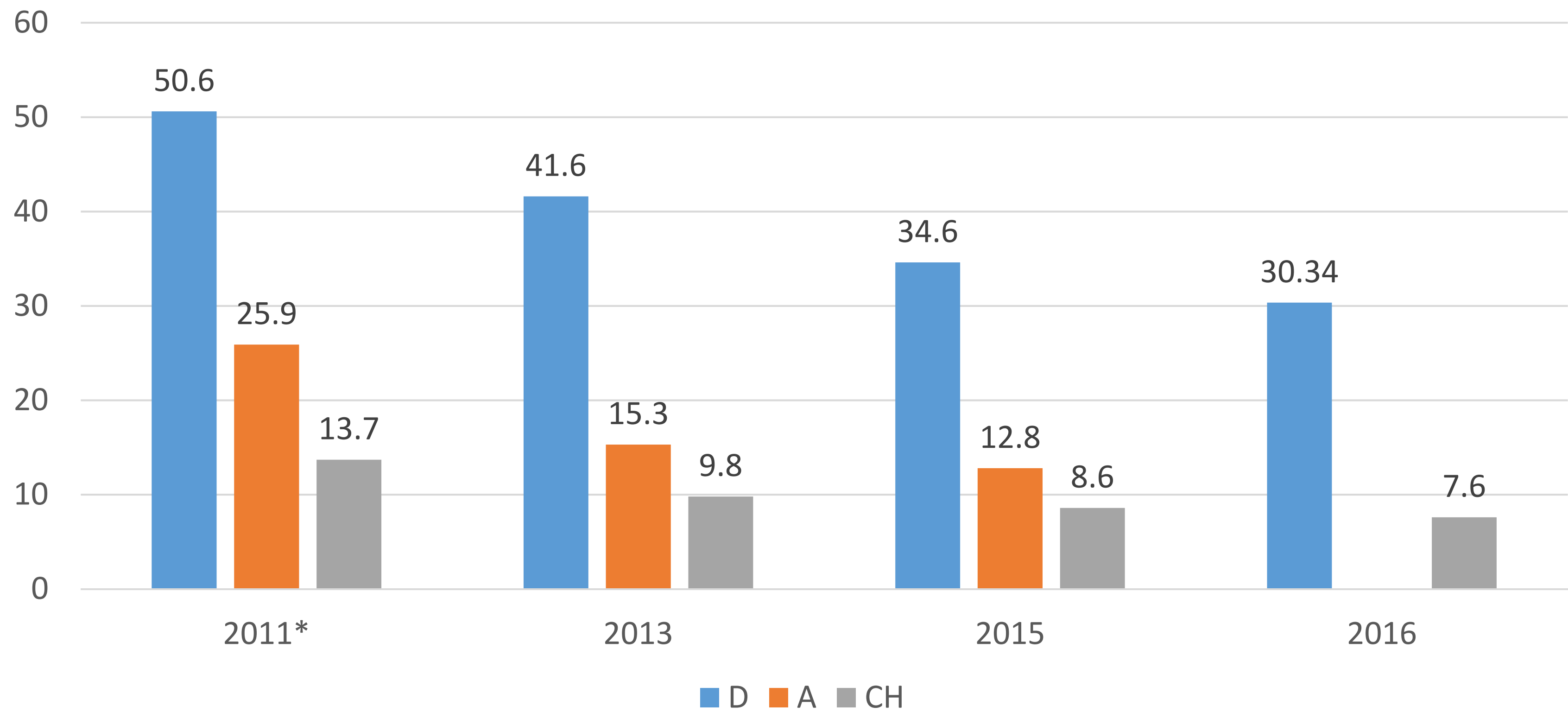
Relative OTA market shares (roomnights) in %, except for 2011 (bookings). CH: members hotelleriesuisse

Evolution OTA Landscape DACH 2011-2016: Expedia-Group



Relative OTA market shares (roomnights) in %, except for 2011 (bookings). CH: members hotelleriesuisse

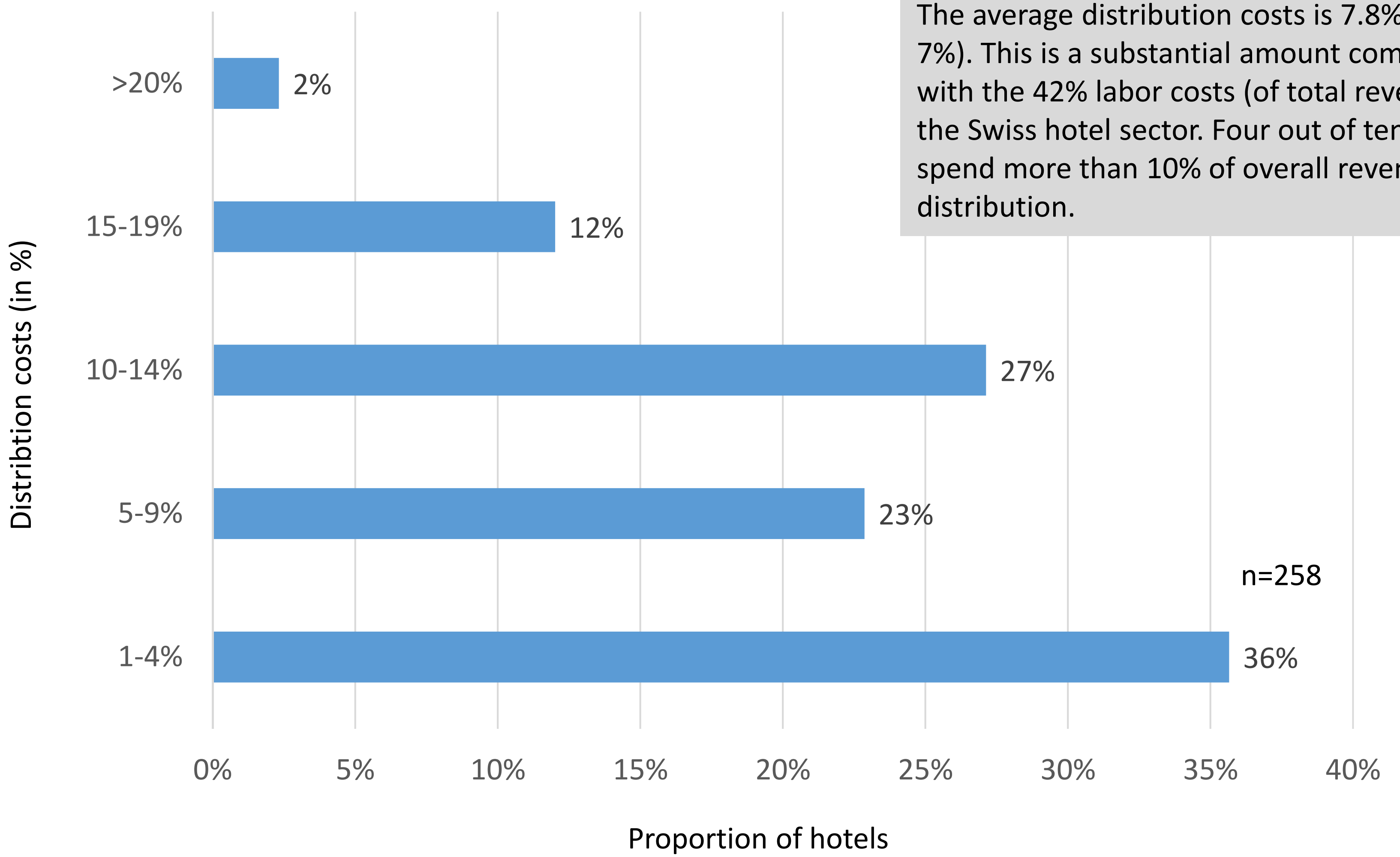
Evolution OTA Landscape DACH 2011-2016: HRS-Group



Relative OTA market shares (roomnights) in %, except for 2011 (bookings). CH: members hotelleriesuisse

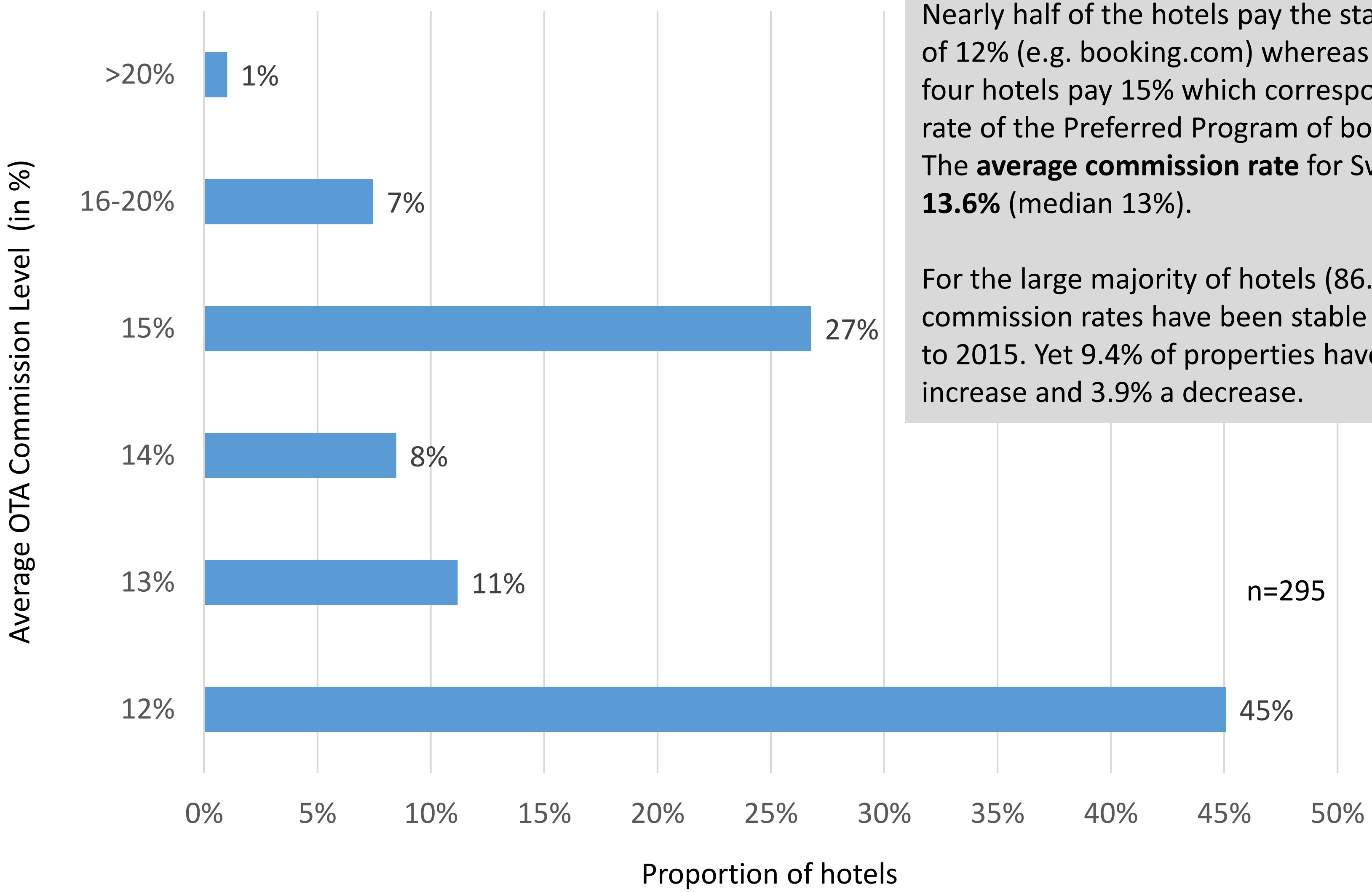
Distribution costs

Distribution Costs as Percentage of Total Revenue



The average distribution costs is 7.8% (median 7%). This is a substantial amount compared with the 42% labor costs (of total revenue) in the Swiss hotel sector. Four out of ten hotels spend more than 10% of overall revenue for the distribution.

OTA Commission Rates in 2016



Nearly half of the hotels pay the standard rate of 12% (e.g. booking.com) whereas one out of four hotels pay 15% which corresponds to the rate of the Preferred Program of booking.com. The **average commission rate** for Swiss hotels is **13.6%** (median 13%).

For the large majority of hotels (86.8%) commission rates have been stable with respect to 2015. Yet 9.4% of properties have seen an increase and 3.9% a decrease.

Estimation of OTA Commission Payments of Swiss hotels

- The estimations on the following slide are based on different hypotheses:
  - The calculations use the lodging revenues of the hotel sector in Switzerland in 2016 (4.1 Billion CHF) as well as the hypothesis that revenues can be distributed proportionally to the market shares of the surveyed channels.
  - The transposition of the figures of the sample to the hotel sector is only valid to a certain extent.
  - A full cost calculation should also take into consideration the fixed costs of particular channels (staff), in addition to clearing costs or the costs of the PMS interface.

➢ The presented estimations show therefore only an **order of magnitude**!

Estimations of OTA Commission Payments

- Using an average commission of 13.6%, an OTA market share of 27.3% and lodging revenues of 4.1 Billion CHF, we can estimate an overall gross OTA turnover of **nearly 1.1 Billion CHF** and OTA commission payments of **152 Million CHF**.
- The average Swiss hotel spends, according to our estimation, nearly **34’000 CHF** per year on OTA commissions (roughly **1100 CHF per room** and year).

Rate Parity Clause Enforcement by OTAs

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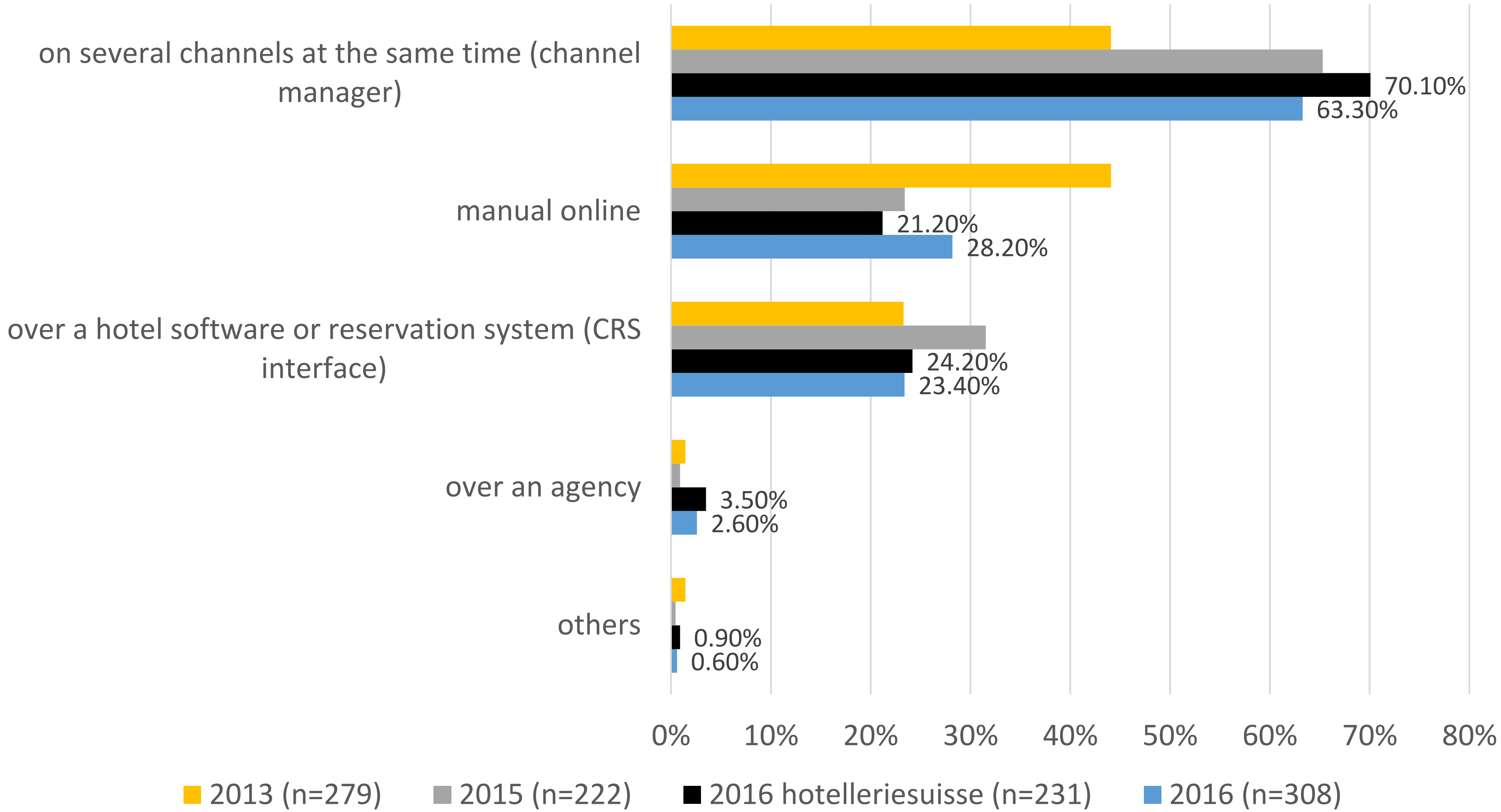
- Do OTAs enforce the parity rule and impose penalties for hotels that undercut OTA rates on their website?
  - 210 of 310 hotels (70%) never had a request from an OTA in this context.
  - For the remaining 30% of properties, the OTA communicated the request either in a written form (16.1%) or on the phone (13.9%)
  - The threatened penalties cover de-listing/drop in ranking on the search result pages (16.3%), exclusion of preferred program (6.3%) or exclusion of platform (6.3%), yet for two third (67.8%) of hotels no sanctions have been mentioned.

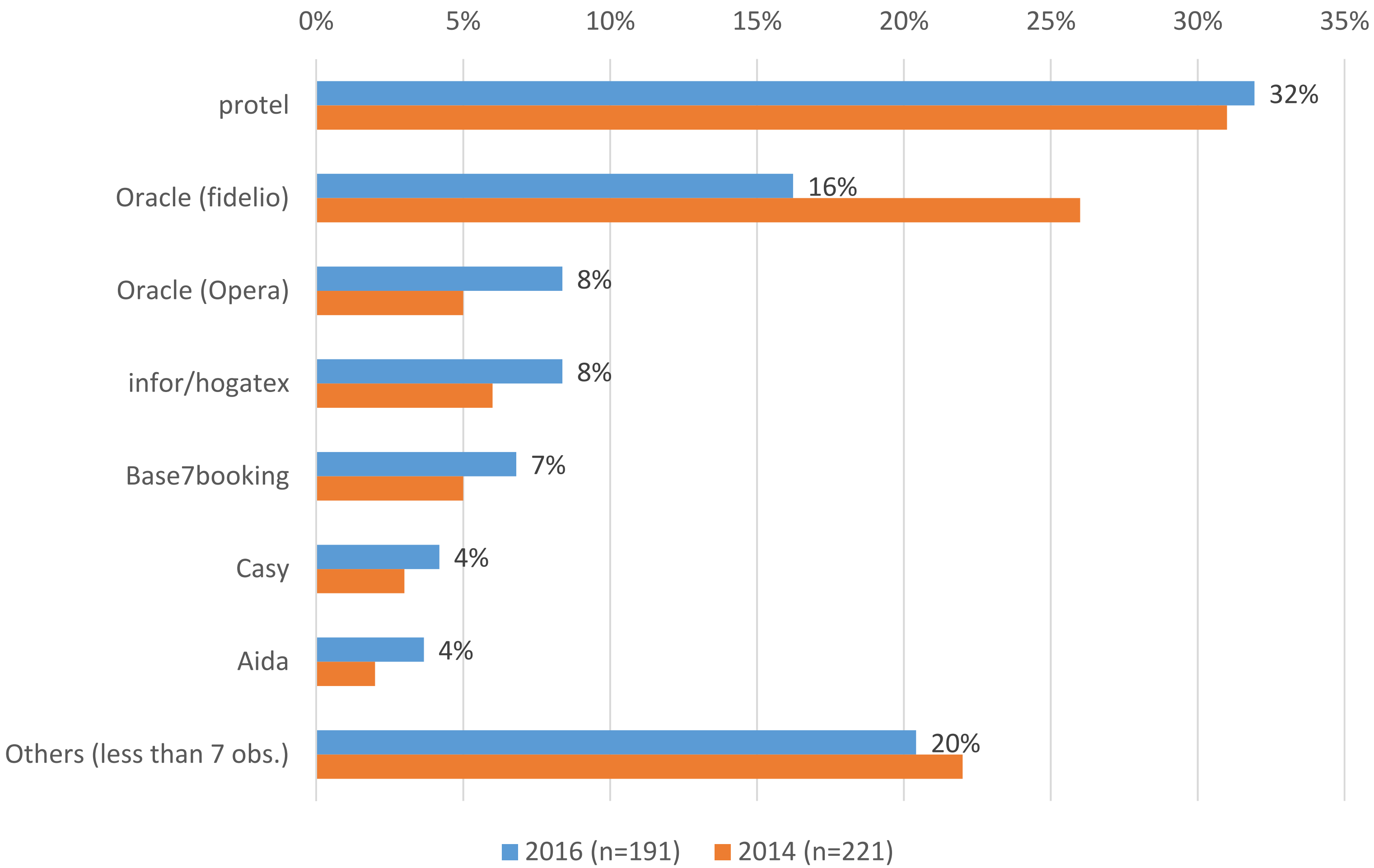
Hotel and Distribution Technologies

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



Question with multiple answers, total can be > 100%

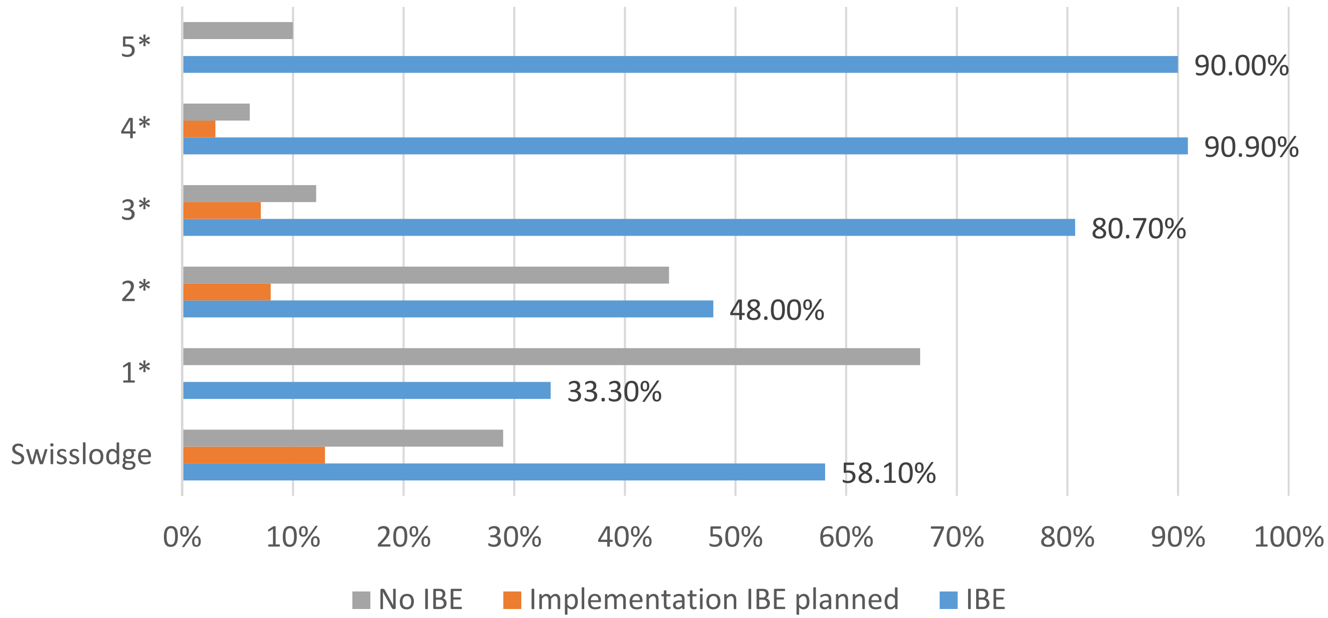
PMS / Front office systems used



- The presented PMS systems in the graph total 80% of the market. In total 28 systems have been registered for 2014 and 2016.

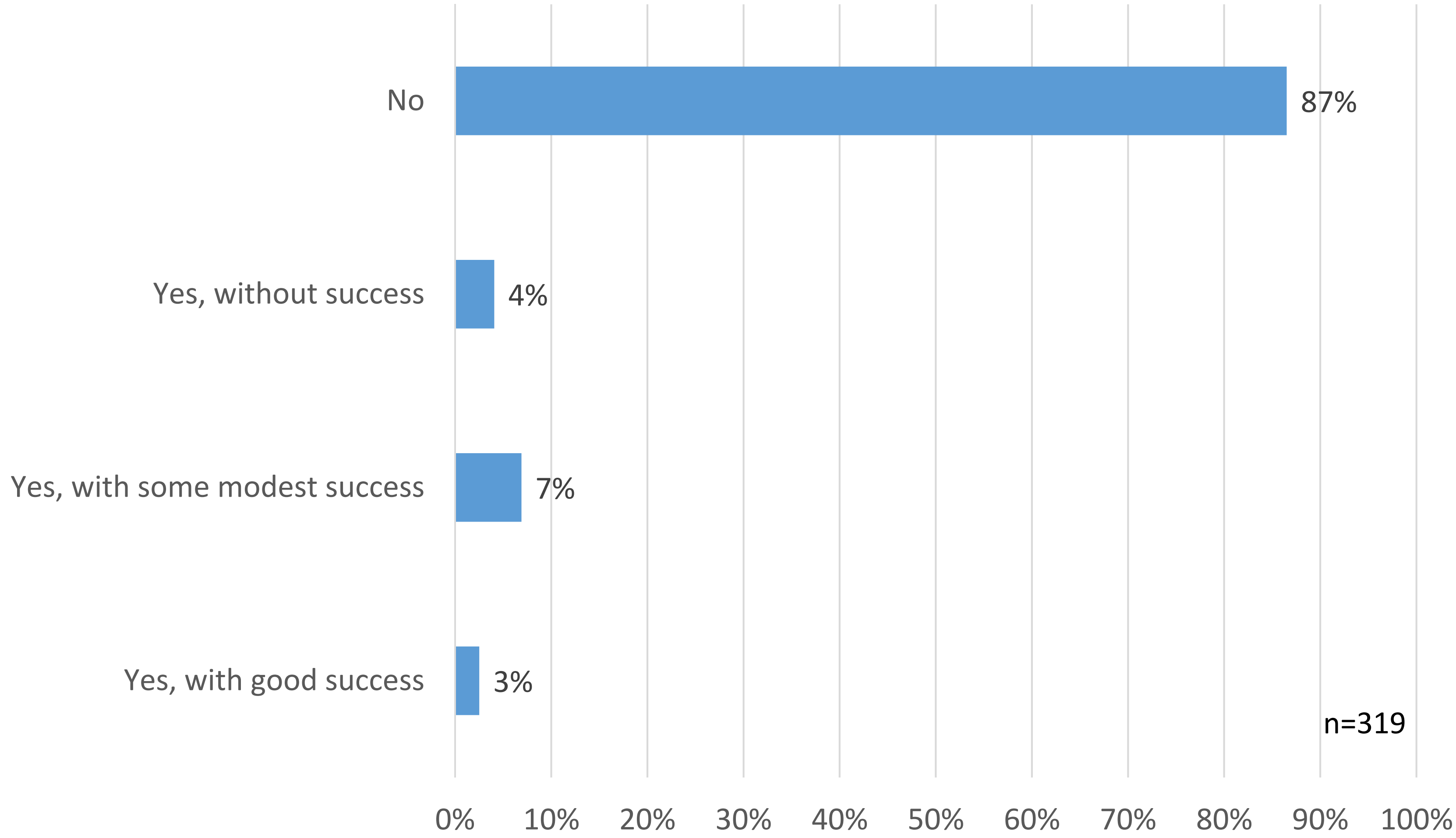
Internet Booking Engine (IBE)

- **Three out of four hotels** (74.5%) use already an **Internet Booking Engine (IBE)** on their website while 6.9% of properties plan to implement such a system in 2017.
  - Members of hotelleriesuisse have a significantly higher proportion in IBE use (82.1%) than non-members (53.6%).
  - The use of IBE is significantly higher in city hotels (84.8%), in hotels with more than 50 rooms (>88%), in chain hotels (85.7% and properties of hotel cooperations (91.3%).

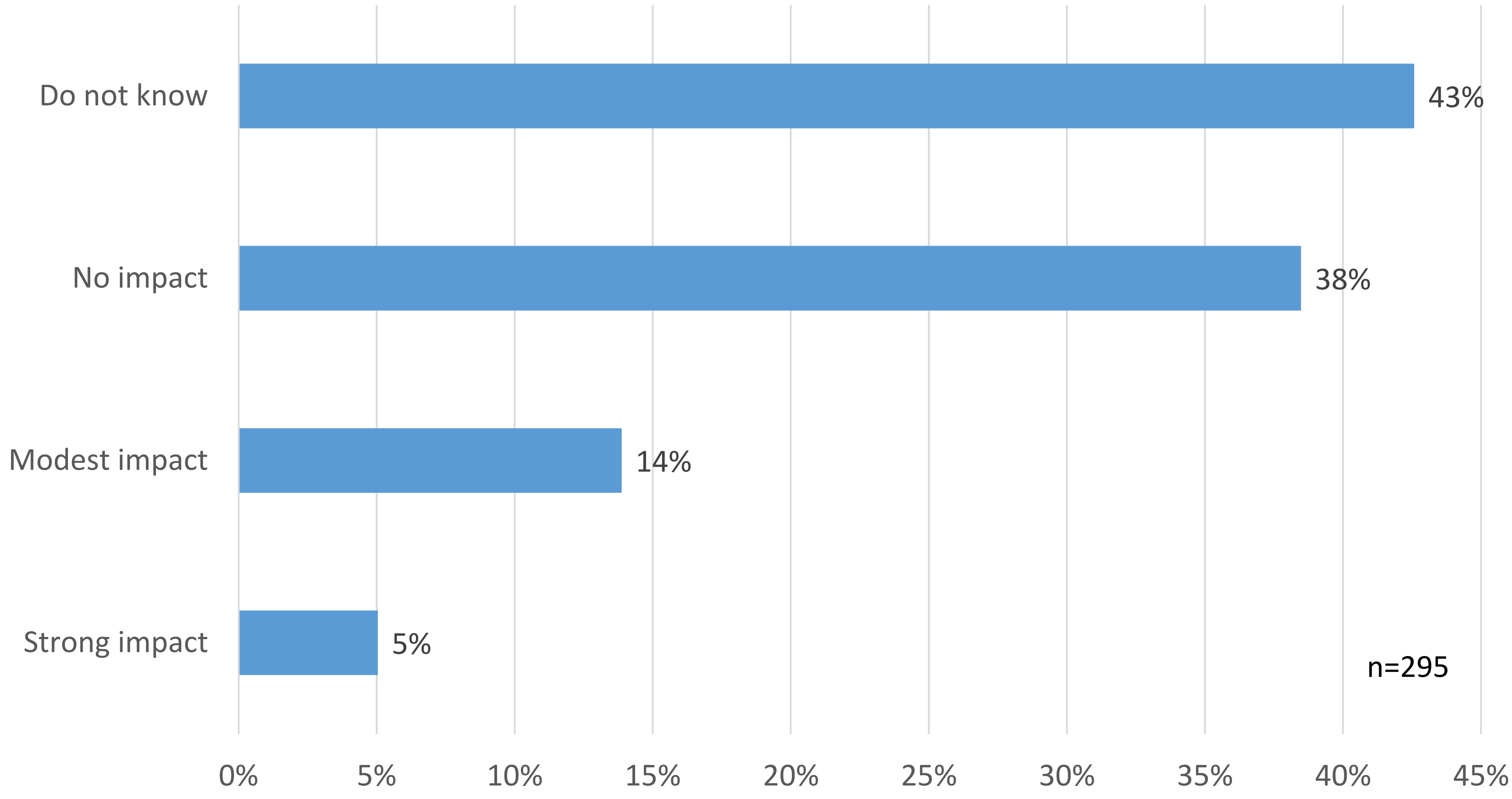


Impact of Airbnb on the Swiss Hotel Sector

Have you ever used Airbnb as Distribution Platform?



Perceived Impact of Airbnb on the Overnights in Hotels



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

EMBA en innovation touristique: www.innovation-touristique.com

Annex: The Questionnaire (page 1)

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
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Swiss Hotel Distribution Study 2017

A. Vertriebskanäle des Hotels

Wie hoch waren die Übernachtungsanteile (Logiernächte) in % im Jahr 2016 über die folgenden Kanäle?

Geben Sie bitte ganzzahlige Werte ein, d.h. für 21.3% geben Sie die Zahl 21 ein. Bitte achten Sie darauf, dass die Summe der Anteile der direkten und indirekten Kanäle 100% ergibt.

Direkt - Telefon	
Direkt - Brief / Fax	
Direkt - Walk-In (Personen ohne Reservierung)	
Direkt - Formular auf der eigenen Website (ohne Verfügbarkeitsprüfung)	
Direkt - E-Mail	
Direkt - Echtzeitbuchung über eigene Website mit Verfügbarkeitsprüfung	
Destination Marketing Organisation (DMO) / Verbände	
Schweiz Tourismus (STC - swisshotels.com)	
Reiseveranstalter / Reisebüros	
Online-Buchungsplattformen (OTA)	
Hotelketten und -kooperationen mit CRS	
Globale Distributionssysteme (GDS - Amadeus, Travelport inkl. Galileo und Worldspan, Sabre)	
Wholesaler (z.B. Hotelbeds, Tourico, Gulliver, Transhotel etc.)	
Event- und Konferenz-Veranstalter	
Social Media Kanäle	
Sonstige Vertriebskanäle	

Annex: The Questionnaire (page 1)

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Wenn 'sonstige Vertriebskanäle', welche:

Optionale Kommentare und Bemerkungen zur generellen Entwicklung der Vertriebskanäle:

Annex: The Questionnaire (page 2)

B. Online-Buchungsplattformen (OTA)

Falls Ihr Betrieb über Online-Buchungsplattformen (OTA) buchbar ist, geben Sie bitte die relative Verteilung der im Jahr 2016 darüber generierten Übernachtungen an.

Geben Sie bitte ganzzahlige Werte ein. Die Summe sollte 100% ergeben.

Agoda	
Bergfex	
Booking.com	
eBookers (Orbitz)	
Expedia	
Hotel.ch	
Hotel.de	
Hoteliers.com	
Hotels.com	
HRS	
Lastminute.com (Travelocity)	
Orbitz Travel	
STC (swisshotels.com)	
Tiscover	
Venere	
sonstige Plattformen	

Annex: The Questionnaire (page 2)

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Wenn "sonstige Plattformen", welche:

Wie hoch ist der Anteil der Kommissionszahlungen an OTAs im Vergleich zu den Gesamtkosten in Ihrem Betrieb?

○ 1%	○ 2%	○ 3%	○ 4%	○ 5%	○ 6%	○ 7%	○ 8%	○ 9%	○ 10%
○ 11%	○ 12%	○ 13%	○ 14%	○ 15%	○ 16%	○ 17%	○ 18%	○ 19%	○ >20%

Wie hoch war die durchschnittliche Kommission (in % im Jahr 2016), welche Sie an die wichtigste Online-Buchungsplattform (OTA) bezahlt haben?

○ 12%	○ 13%	○ 14%	○ 15%	○ 16%	○ 17%	○ 18%
○ 19%	○ 20%	○ 21%	○ 22%	○ 23%	○ 24%	○ >25%

Annex: The Questionnaire (page 3)

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Wie haben sich die Kommissionssätze gegenüber letztem Jahr entwickelt?

- O höher
- O gleich
- O tiefer

Haben Online-Buchungsplattformen (OTA) bei Ihnen Preisanpassungen aufgrund der verlangten Best Price Garantie eingefordert?

- O Ja, schriftlich kommuniziert
- O Ja, telefonisch kommuniziert
- O Nein

Welche Strafmassnahmen wurden bei Nichteinhaltung der Best Price Garantie eingeleitet?

- O Ausschluss
- O Ausschluss aus Preferred Programme
- O Schlechteres Ranking
- O keine Strafmassnahmen
- O Anderes

Wenn "Anderes", was?

Annex: The Questionnaire (page 3)

C. Nutzung Buchungstechnologie & Airbnb

Wie pflegen Sie Ihre Raten und Verfügbarkeiten auf den Online-Buchungsportalen?

- ☐ auf mehreren Portalen gleichzeitig (Channel Manager)
- ☐ über eine Agentur
- ☐ über Hotel-Software oder –Reservationssysteme
- ☐ Manuell online
- ☐ Sonstiges

Wenn "Sonstiges", wie?

Mit welchem PMS/Front Office arbeiten Sie?

Verfügen Sie über eine Web Booking Engine (Echtzeitbuchung auf Ihrer eigenen Website)?

- O Ja
- O Nein, ist aber vorgesehen für 2017
- O Nein

Hat das Angebot von AirbnB in Ihrer Region zu einem Rückgang der Logiernächte in Ihrem Betrieb geführt?

- O Ja, sehr starker Rückgang
- O Ja, geringer Rückgang
- O Nein, kein Impakt
- O Weiss nicht

Haben Sie selber bereits Angebote auf Airbnb geschaltet?

- O Ja, mit gutem Erfolg
- O Ja, mit geringem Erfolg
- O Ja, ohne Erfolg
- O Nein

Annex: The Questionnaire (page 4)

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D. Allgemeine Informationen zu Ihrem Hotel

saisonale Öffnungszeiten

O Ganzjahresbetrieb O Zweisaisonbetrieb O Einsaisonbetrieb (Winter) O Einsaisonbetrieb (Sommer)

Sterne-Klassifikation

O Swisslodge O 1* O 2* O 3*
O 4* O 5* O andere Kategorie

Grösse des Hotels (Zimmeranzahl)

Lage

O Stadt O Ferienort/Ressort O Andere Lage

Gehört Ihr Hotel einer Hotelkette oder Hotelkooperation an?

O Nein O Ja, Kette O Ja, Kooperation

Wenn Sie eine Zusammenfassung unseres Schlussberichtes möchten, geben Sie uns bitte Ihre E-Mail im folgenden Feld an: