



TRENDS REPORT

OCTOBER 2019



LETTER FROM THE MANAGEMENT

GesHotels is the market leader in gathering, managing and analysing guest experiences in the hotel sector. Over 1000 hotels run by the sector's leading companies currently trust in our services in more than 29 countries.



After collating and analysing over 3.5 million resort hotel guest experiences in 2018 alone, we are delighted to publish this annual report with information of interest to the tourism sector.

Our study aims to provide an overview of the current situation in tourism based on the statements and experiences of end users of hotels that have decided to revolve the day-to-day running of their business around their guests with the help of **GesHotels**. After all, it is the users who set out the roadmap for the sector to follow.

The information gleaned from our analyses and provided in this report is of considerable value for hotel management teams and organisation departments.

We hope our content will make a positive contribution to professionalism, help to continually improve the tourism sector and be of value to you.

Best regards,

Carmen Tudela
Managing Director of **GesHotels**



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STUDY METHOD

Obtaining information

At **GesHotels** we obtain all information from each establishment's guests in person through our **Guest Experience Auditors**. As our work is always done in person, **we achieve participation from over 90% of the hotel's occupancy at that time**. The objectivity and impartiality of our audits is our mark of quality and has been recognised throughout the sector.

Managing information

The result of each audit is sent through our data management software to the head office, where our **Smart Data Analysts** study each response and comment given by guests in the **Customer Experience Audit** in minute detail. Once all the data has been checked, the information is immediately made available to the hotel.

Analysing aggregate data

A section of the analysis department has studied the data from all guests as a whole to find patterns and trends in the sample's behaviour to produce this report.

Publishing the results

Given the data complexity and volume, a committee was set up to check and verify every item of **GesHotels** News. **This is why the report is published monthly.**

We base our publications on three main blocks:

- Sales & Marketing Study
- Guest Experience Audit
- Semantic Study of Guest Suggestions



PUBLICATIONS JANUARY

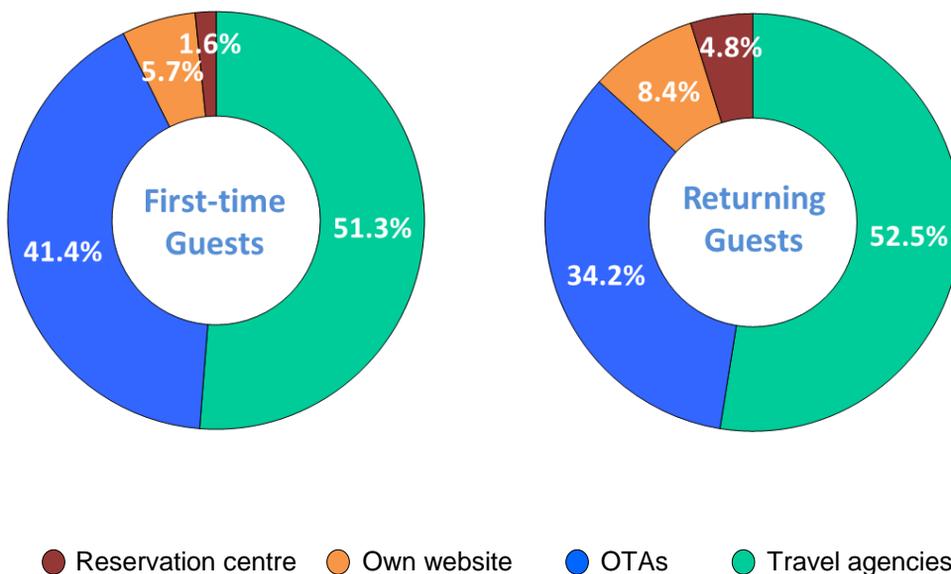




1. Comparative analysis of sales channels distribution between returning and first-time guests.

Having analysed which sales channels audited guests used to book, we observed that **returning guests** book through the company's own sales channels 81% more than **first-time guests**.

Companies' reservation centres are also the sales channel with the highest proportional growth in terms of returning guests. Specifically, **returning guest use of a reservation centre has increased by 200% compared with first-time guests**.

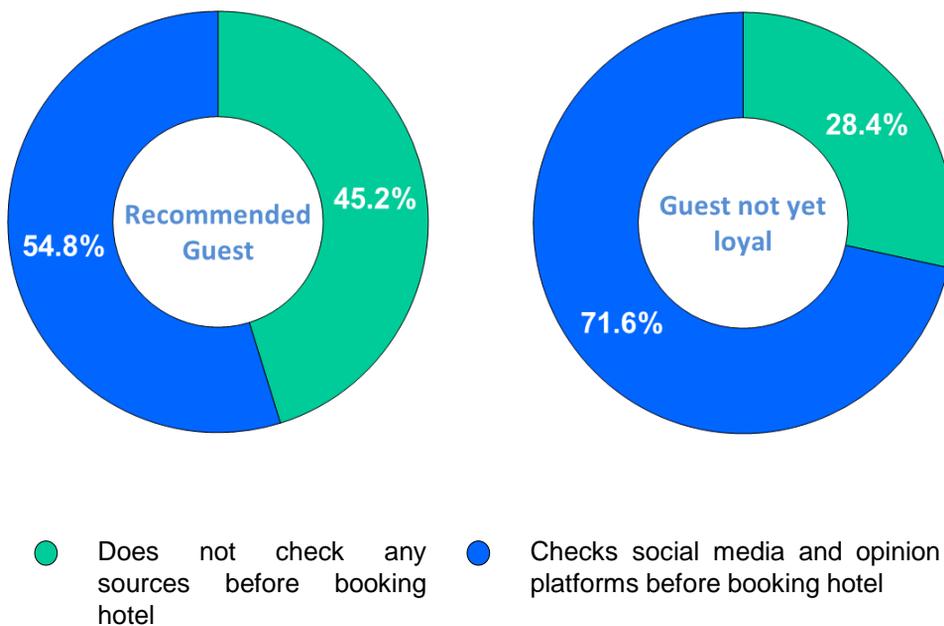


The graphs show that exceeding a guest's expectations and gaining their loyalty **increases** the company's **bottom line**, secures more direct bookings and **reduces dependence on OTAs by 17.4%**.



2. Analysis of the impact a direct recommendation made by influencer guests has on future guests.

Percentage of guests who check social media and opinion platforms



Based on the information channel study, 45.2% of recommended guests do not look for information on social media or opinion platforms before making their reservation. They simply rely on the recommendation from their acquaintances to book a room in the establishment.

On the other hand, **seven out of ten guests who have yet to become loyal** state that they do look up comments and reviews online before deciding on a hotel.

The numbers reveal that day-to-day running focused on improving customer experience **improves your online reputation and makes you less dependent on it.**



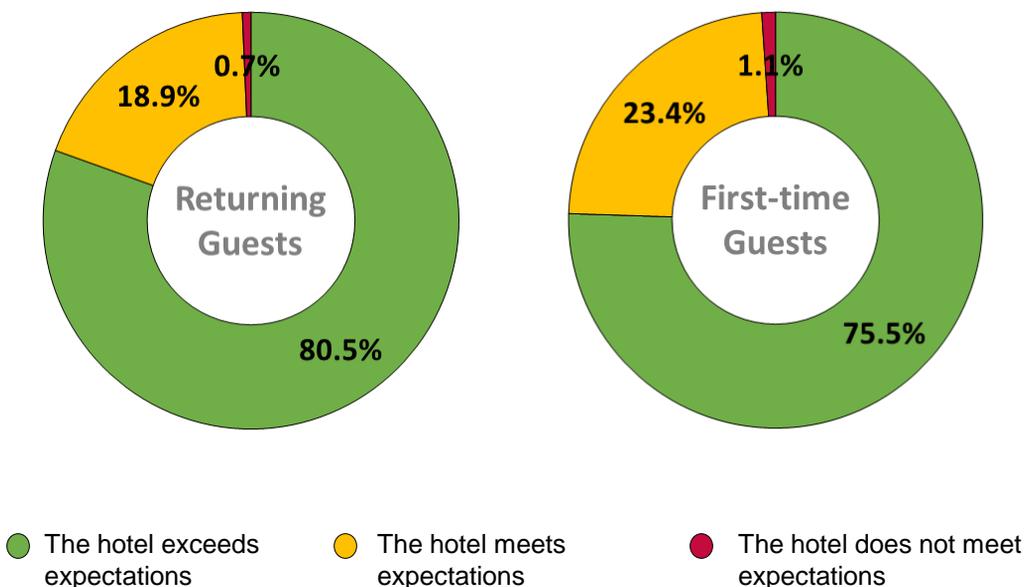
PUBLICATIONS FEBRUARY





3. Analysis of the perception of the hotel held by differing guest types.

The results obtained by hotels that have decided to revolve the day-to-day running of their business around their guests using the **GesHotels Fidelity Express** method have been highly positive in both guest groups, as **expectations have been exceeded for more than three quarters of customers.**



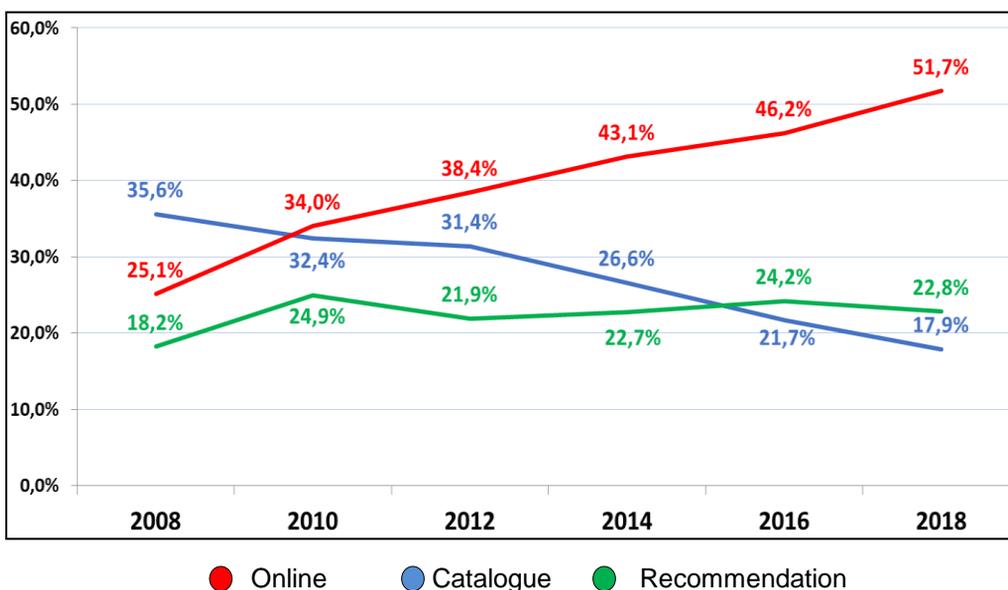
Analysing the returning guests group, the percentage of customers whose expectations have not been exceeded is reduced by 20% compared with first-time guests.

The data reveals that **focusing your strategy on increasing the percentage of returning guests year after year improves your satisfaction rates, online reputation and RevPAR.**



4. Analysis of promotional channel trends over the past ten years.

GesHotels has analysed promotional channel trends over the past ten years by studying guest experiences from 2008 to 2018.



The Internet has undoubtedly become an important way to promote tourism. Currently, 51.7% of hotel reservations are booked online through a variety of sales channels.

The graph shows a clearly upward trend for the Internet as the most widely used means of promotion, whereas offline media such as holiday catalogues are disappearing.

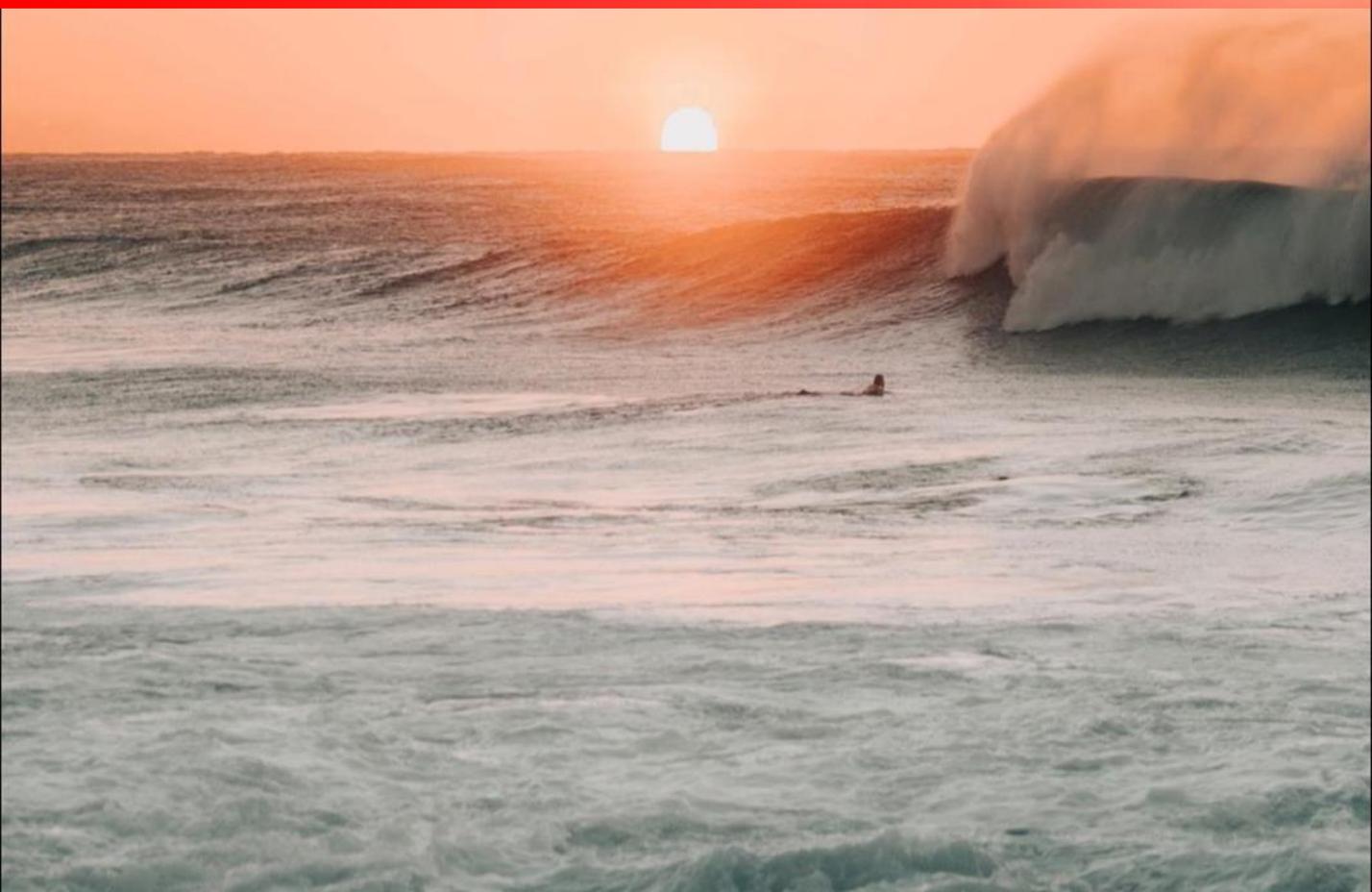
Recommendation as a promotion channel remains stable at around 22%, with a slight upward trend over the years in hotels that have decided to revolve the day-to-day running of their business around their guests using **GesHotels Fidelity Express**.

Increasing guests' recommendations will be the only promotion channel capable of limiting the Internet as the sole promotion channel in the future. It is also a channel that costs nothing and is free from competition.



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PUBLICATIONS MARCH



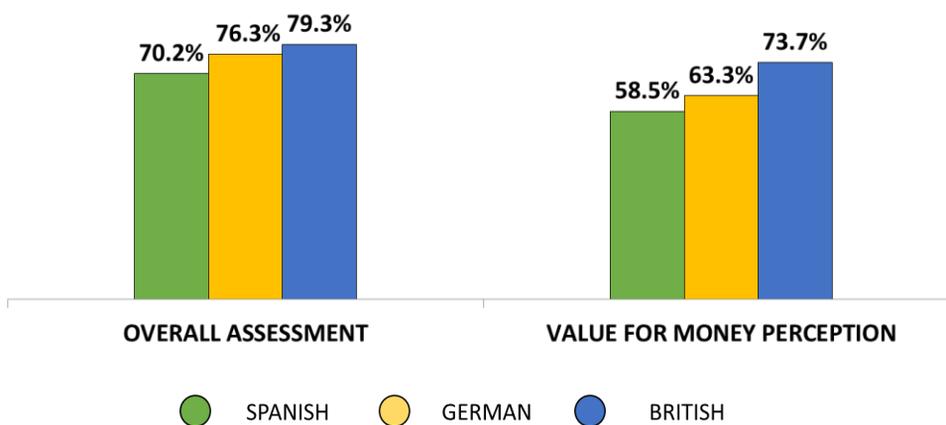


5. Analysis of the relationship between guest satisfaction and the perception of value for money.

Not all tourists are the same. That's why it's virtually impossible to surprise all hotel guest segments and nationalities in equal proportion. After providing service minimums, when the hotel competes on excellence, knowing what each of its markets wants helps it focus its resources on strengthening its shortcomings and highlighting its benefits to become more competitive.

At **GesHotels** we have looked at how Spanish, German and British guests perceive the hotel overall, and compared this with their perception of value for money.

Percentage of guests whose expectations have been exceeded



For each market, the perception of value for money is directly linked to satisfaction. We can therefore conclude that by increasing guests' overall satisfaction, prices can be increased while maintaining their perception that they receive more than what they are paying for.

Irrespective of nationality variations, hotels that have decided to determine their guests' needs through the **GesHotels Fidelity Express** method have exceeded the expectations of more than three quarters of their occupancy.



GUEST EXPERIENCE AUDIT

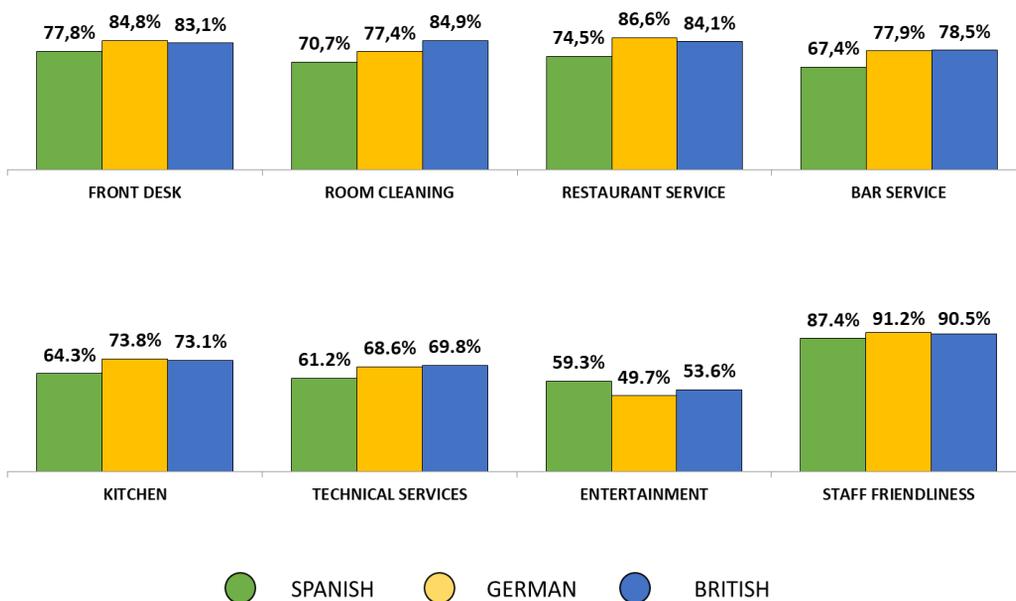
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6. Analysis of the perception of the hotel's departments by nationality.

Different nationalities, different perceptions. The same experience can be perceived differently depending on who the observer is. The same hotel, with the same service and the same products, can create different impressions on different guests.

At **GesHotels** we have studied the perceptions that German, British and Spanish guests have of the same hotel departments.

Percentage of guests whose expectations have been exceeded

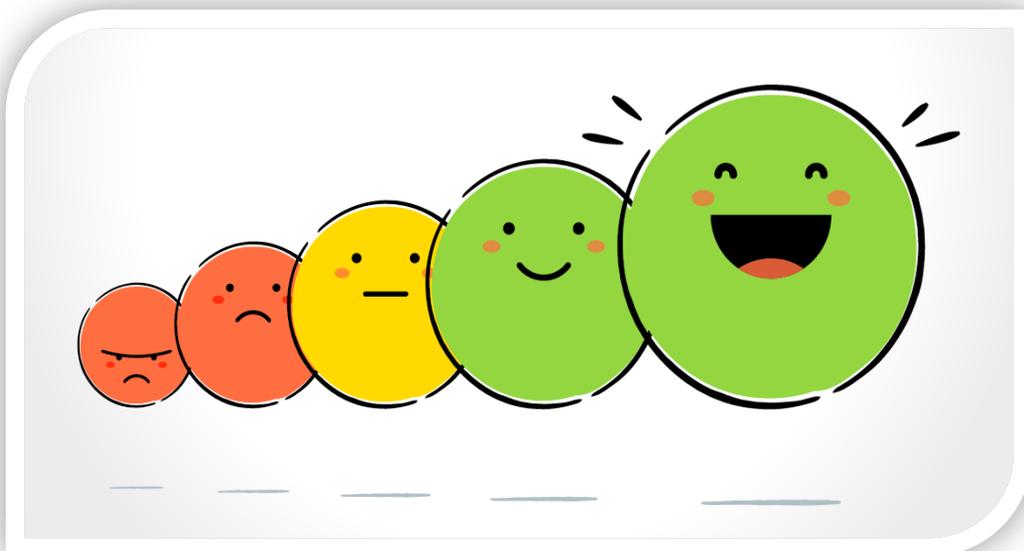


We have analysed what these graphs tell us about the three nationalities below:

GUEST EXPERIENCE AUDIT

- **German guests:** despite their high percentage of overall satisfaction (**76.3%** of very satisfied customers, with their expectations exceeded), which was published in our first news bulletin in March, German guests rate the friendliness of staff and the quality of the service received in restaurants or at the front desk better than the kitchen or the cleanliness of the rooms.
- **British guests:** they are more satisfied in overall terms, with **79.3%** of customers very satisfied. Despite their good overall perception, they are somewhat more demanding than German customers concerning the kitchen, front desk services and restaurant departments, as well as with staff friendliness in general.
- **Spanish guests:** the figures show that Spanish customers are the hardest to surprise. Spaniards are the most demanding concerning all hotel departments, with the exception of entertainment. However, as stated in previous bulletins, overall expectations were exceeded for **70.2%** of the Spaniards audited.

If we consider that satisfaction depends on the expectations generated when choosing a product, we can conclude that the German and British markets have a better understanding of the product they are buying than Spanish customers.

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PUBLICATIONS APRIL



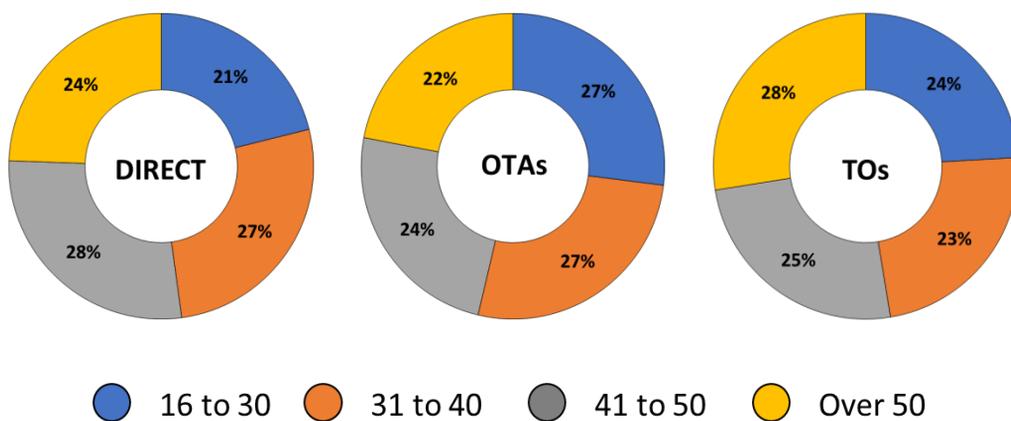
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7. Analysis of the distribution of sales channel use.

Irrespective of the booking volume through each sales channel—tour operators, OTAs or direct sales (website + call centre)—GesHotels has analysed age distribution patterns.

As shown in the graphs, the distribution within each channel is spread almost equally across the four age ranges.



Analysing the online travel agencies (OTAs) channel reveals it is used most for bookings by customers aged 16 to 40. A total of 54% of the distribution in this channel comprises customers from this age range.

Reservations made through agencies or tour operators (TOs) are led by customers over the age of 50, as they comprise 28% of this channel's bookings. In contrast, the segment aged 31 to 40 uses this channel the least, at 23%.

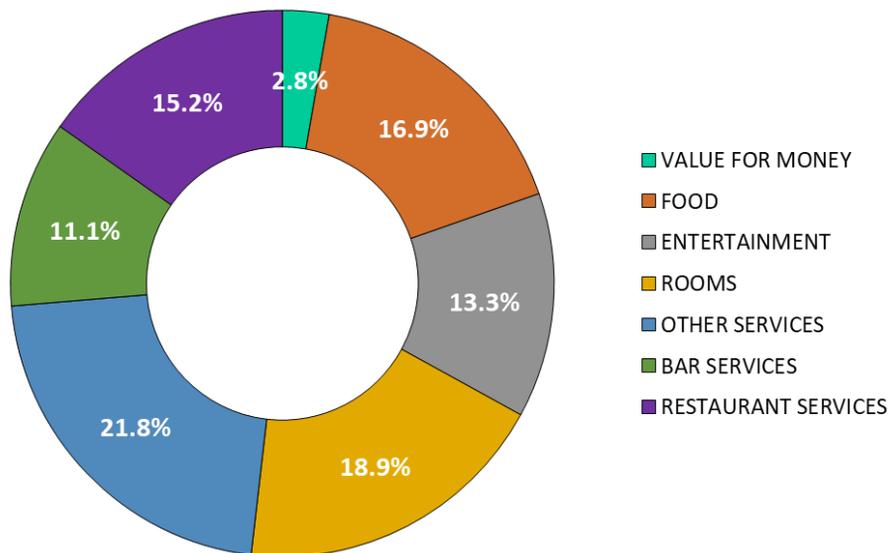
Finally, three out of ten reservations using the direct sales channel comprise customers aged 41 to 50, the segment that most uses this method for their bookings. In contrast, the youngest segment is the least likely to contribute to the growth of this sales channel, accounting for 21% of the distribution.

As a result of the analysis, we can conclude that there is no favourite age group for each promotion channel, which indicates that measures aimed at boosting direct sales should focus equally on all age ranges.

SEMANTIC STUDY OF GUEST SUGGESTIONS

8. Analysis of the distribution of suggestions for improvement received by hotels.

Based on this semantic study of all the suggestions spontaneously provided by guests as a result of our **Customer Experience Audits**, we looked at how the volume of suggestions is distributed by department.



The graph shows that it is the hotel's "Other Services", such as Wi-Fi, facilities, furniture or swimming pools, that generate most suggestions for improvement, accounting for 21.8% of the total. This is followed by the "Rooms" department, with 18.9% of suggestions. The "Kitchen" department accounts for 16.9% of suggestions.

This initial large block, which accounts for 57.6% of customer comments suggesting improvements of some kind, is followed by "Restaurant Service" with 15.2%, "Entertainment" with 13.3% and "Bar Service" with 11.1%.

As explained in previous news bulletins, the perception of value for money is closely linked to the customer's overall satisfaction. This is why hotels that improve guest experience through our **GesHotels Fidelity Express** method receive only 2-8% of suggestions relating to the price of their product.



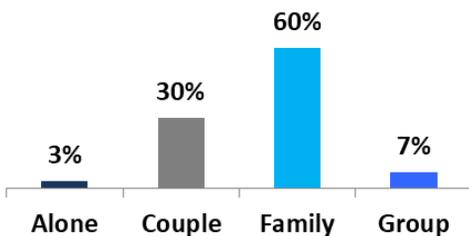
PUBLICATIONS MAY





9. Analysis of the profile and preferences of the guest segment aged 31-40.

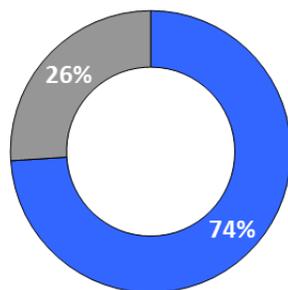
The segment of tourists aged 31 to 40 accounts for 20.4% of current hotel occupancy. At **GesHotels**, we know how important it is for organisations to understand and define the profile and preferences of each of their age segments. In this study, we have analysed the data this guest group provided through our **Customer Experience Audits** to gain a better understanding of it.



The graph shows that this guest segment travels above all as a family, specifically 60%. The second option, with 30%, is to travel as a couple.

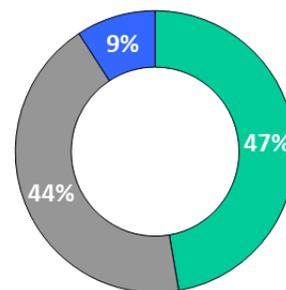
When booking a hotel, 74% of guests look up information on social media or opinion platforms before deciding to make their reservation. Once they have chosen a product, 47% book through a traditional travel agency. This is followed by 44% of guests who reserve their room through OTAs. Finally, the remaining 9% book their room directly with the company through their website or call centre.

Percentage who check social media and opinion platforms



● Yes ● No

The channels used for booking



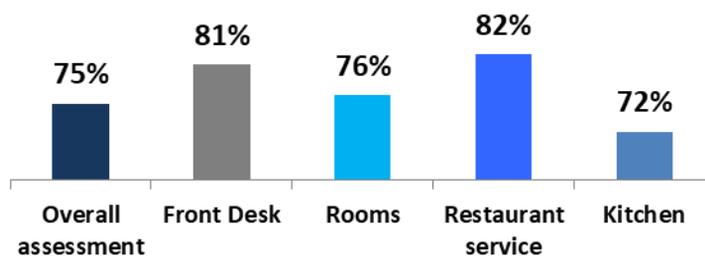
● Direct
● Travel agencies
● OTAs



SALES & MARKETING STUDY

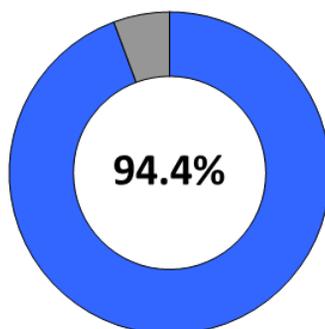
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Once guests arrive at your establishment, we analyse what they tell us about the hotel's departments. In general, hotels that manage customer feedback through our **GesHotels Fidelity Express** method exceed the expectations of 75% of guests in this segment. Further analysis of each department shows that the front desk and restaurant services stand out in particular, exceeding the expectations of 81% and 82% of guests, respectively.



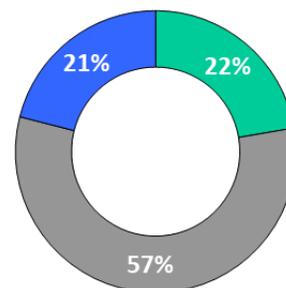
Once the guest's stay ends, the hotel should take stock and check whether the percentage of customers leaving the hotel satisfied is as expected. In this case, 94.4% of guests aged 31 to 40 check out of the hotel with the intention of recommending it to others. Another indicator for checking whether the establishment has performed well during guests' stay is the percentage who found the hotel through a recommendation by their acquaintances, which in this case is 21%.

Percentage of guests who would recommend the hotel



● Would recommend

The channels used to find out about the hotel



● By recommendation
● Through catalogues or guides
● Online

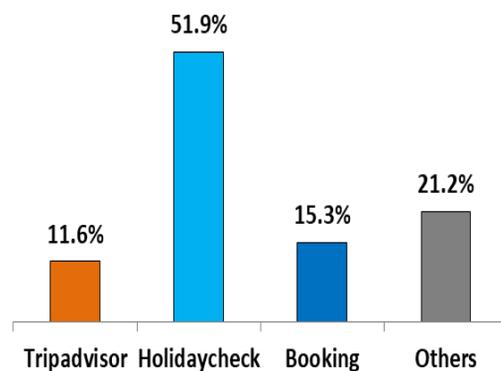
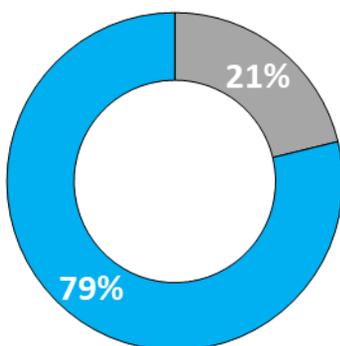
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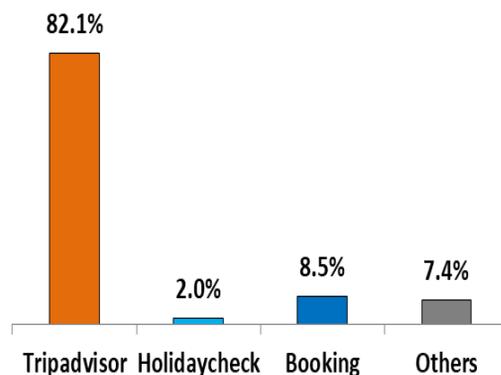
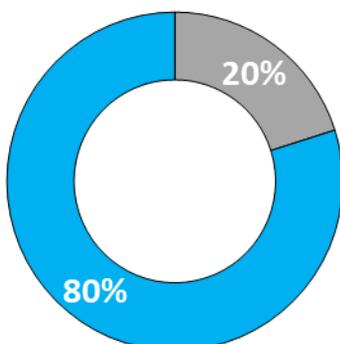
10. Analysis of the influence of opinion platforms on German, British and Spanish guests.

Today, a hotel's online reputation is one of the most influential factors for meeting guests' expectations. Consequently, **GesHotels** has analysed the use made of opinion platforms by German, British and Spanish tourists.

Germans: as the graph shows, 21% of German first-time tourists do not visit any online platforms to find information about the hotel before booking. More than half of the remaining 79%, who do search for information online, look at HolidayCheck.



British: 20% of British first-time tourists do not look for information on any opinion platform when choosing their hotel. The 82.1% who do search online did so through TripAdvisor, which is the favourite platform for British tourists by a considerable margin.

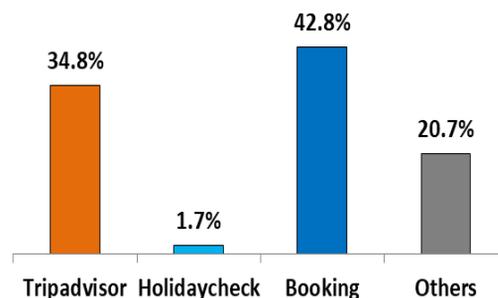
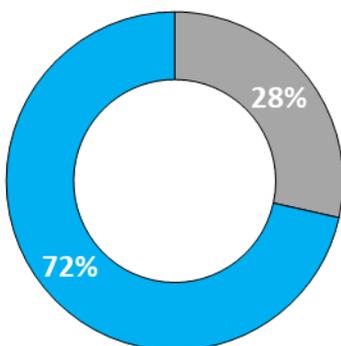




SALES & MARKETING STUDY

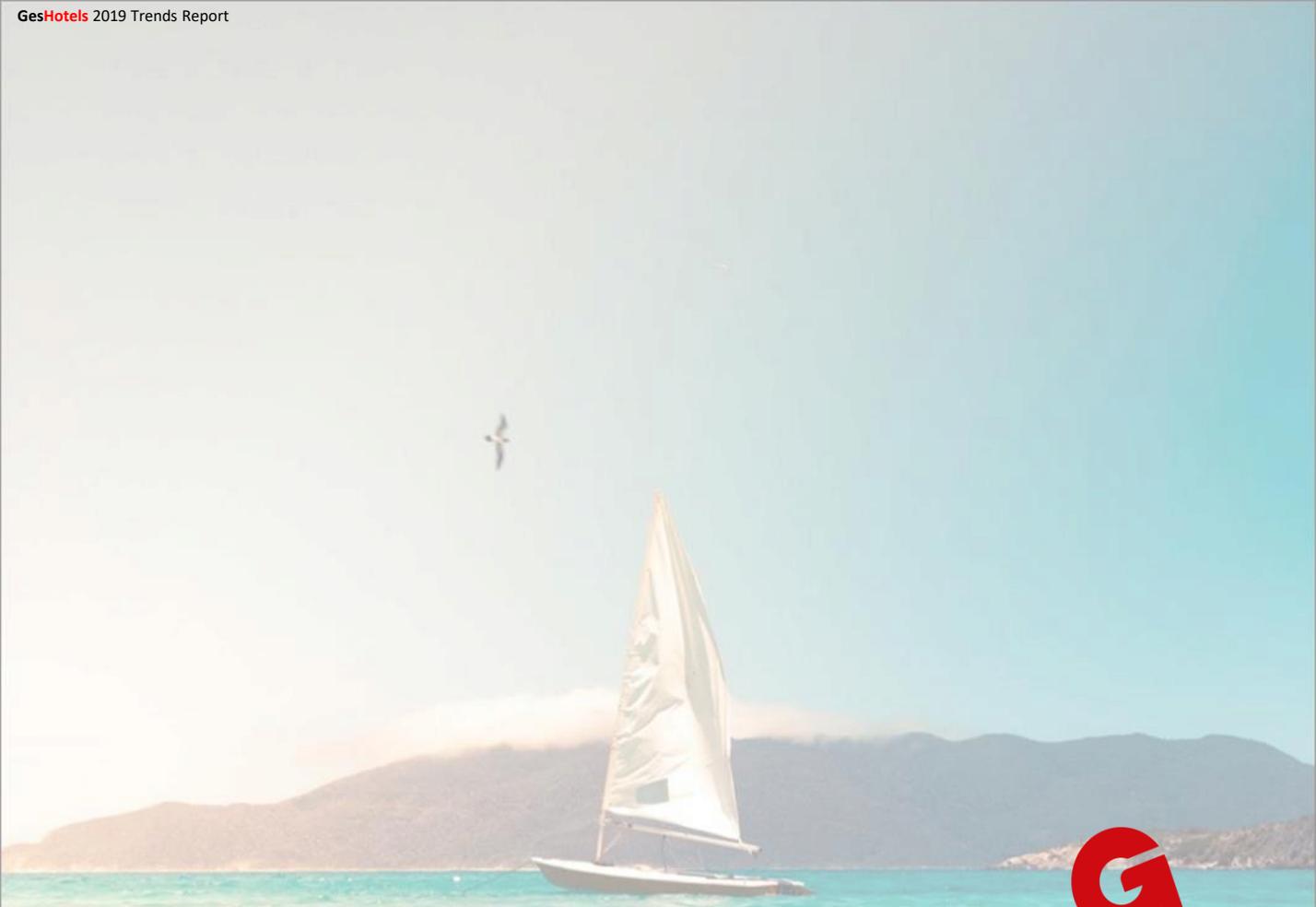
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Spanish: the percentage of tourists who did not look up information on any opinion platform is higher than for the other two nationalities at 28% of all first-time guests. Searches by Spaniards who did go online to find information were made through Booking (42.8%) and TripAdvisor (34.8%).



By understanding how each platform influences the opinion of your target guests, you can draw up specific action plans for each segment and guarantee competitive online reputation rates.

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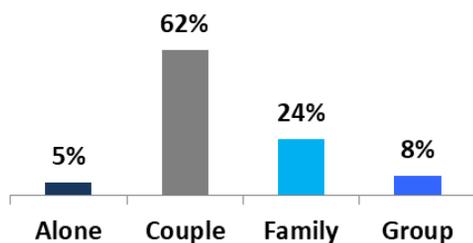
PUBLICATIONS JUNE





11. Analysis of the profile and preferences of the guest segment aged over 50.

Following on from last month's study, which analysed the profile and preferences of guests aged 31 to 40, this month we have found out more about guests over the age of 50, a segment that makes up 37.51% of current hotel occupancy.

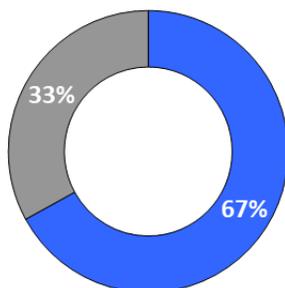


As a result of this analysis, we can see in the graph that 62% of the people in this segment travel as a couple. The other guests travel with their family (24%), as part of a group (8%) or on their own (5%).

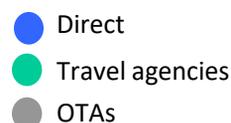
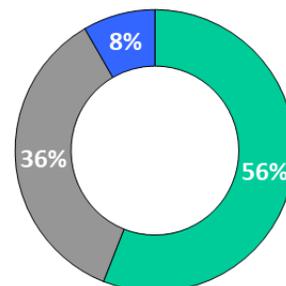
When making a reservation at a hotel, 33% of guests over the age of 50 state that they don't look up information on social media or opinion platforms before deciding to book. This is 7% higher than the segment aged 31 to 40, which we looked at in May.

Once they have decided, 56% book through a traditional travel agency, followed by 36% who book through OTAs. Finally, the remaining 8% book their room directly with the company through their website or call centre.

Guests who check social media and opinion platforms



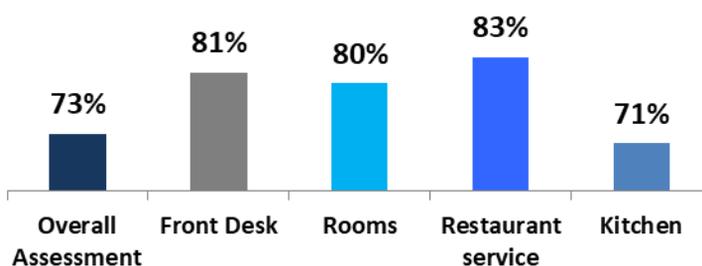
The channels used for booking





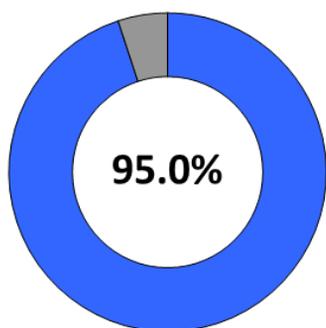
SALES & MARKETING STUDY

By analysing the information provided by this segment during their stay, we can discover what they tell us about the hotel’s departments and services. In general, hotels that manage customer feedback through our **GesHotels Fidelity Express** method exceed the expectations of 73% of guests in this group. A more in-depth analysis shows how these guests are somewhat more demanding in terms of food than guests aged 31 to 40 (who were analysed in May), though they are more forgiving with the rooms department.



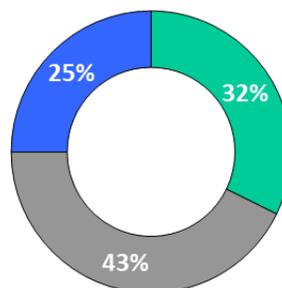
After checkout, 95% of guests aged over 50 have the intention of recommending the hotel to friends or relatives. Proof that the hotel has performed well during guests’ stay is the percentage who found the hotel through a recommendation from their acquaintances, a form of free promotion for the hotel from 25% of guests.

Percentage of guests who would recommend the hotel



● Would recommend

The channels used to find out about the hotel



● By recommendation
 ● Through catalogues or guides
 ● Online

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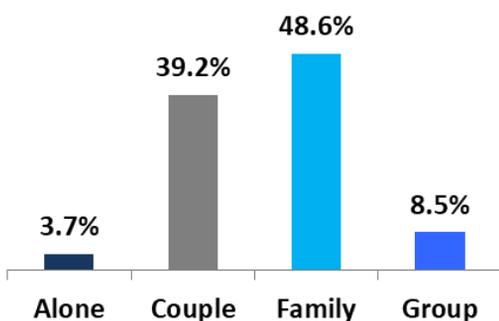
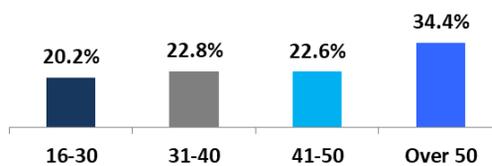
12. Analysis of the profile of guests who book through the hotel's website.

The social, tourist and technological context of the world today means that guests have far more information and hotels available to them that are all just a click away.

At **GesHotels**, we know how important it is for a company's bottom line to increase its percentage of direct sales as much as possible.

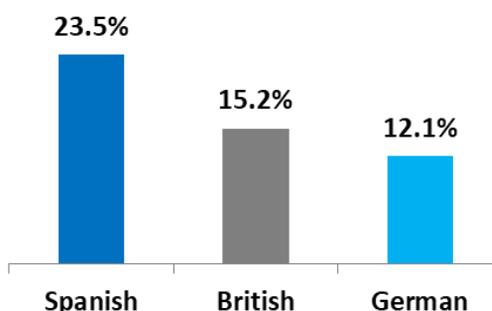
Besides supporting companies in their day-to-day running of their businesses to secure guests' loyalty (a determining factor in increasing direct sales), we also provide the following data on the profile of guests who book through the hotel's website.

We can observe how the percentage of guests who book directly through the hotel's reservations system is spread evenly among the age ranges.



Out of sales through the hotel's own reservations platform, 48.6% are by guests who travel as a family. They are followed by couples, with 39.2% of reservations made this way. The percentage of direct sales made by groups or tourists travelling on their own is much lower, as together they account for 12.2% of sales.

Concerning nationality, Spaniards contribute most to direct sales, by some margin, at 23.5%, followed by the British and Germans at 15.2% and 12.1%, respectively.



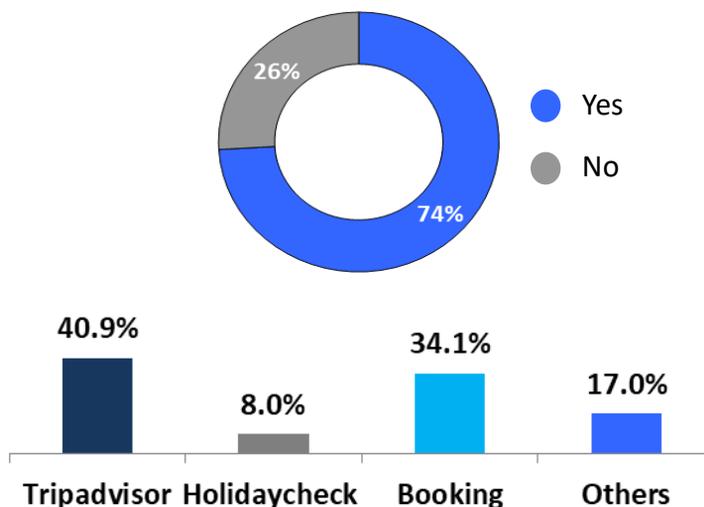


SALES & MARKETING STUDY

Having defined the profile of guests who book through the hotel’s website, we began researching in more detail, such as where they find their information about the hotel or how they arrive at that information.

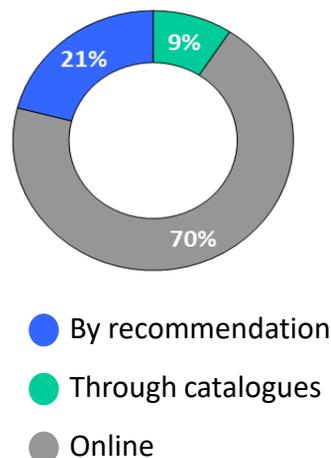
The following graphs show that 26% of guests who buy directly from the hotel’s website do not look up information on other platforms. The 74% of guests who do look up information are distributed as follows: 40.9% through TripAdvisor, 8.9% through HolidayCheck, 34.1% find their information through Booking and 17% through other platforms such as Expedia, Google, etc.

Do they read up on the hotel on social media or opinion platforms?



Finally, analysis of the promotion channels shows that 70% of guests who booked through the website arrived there by online means. One noteworthy aspect is that companies who prioritise guest satisfaction through GesHotels achieve 21% of direct sales through recommendations from former guests, which increases booking profit and also allows for savings in attracting guests.

How did they find out about the hotel?



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PUBLICATIONS JULY



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13. Comparative analysis of booking preferences between Spanish first-time and returning guests.

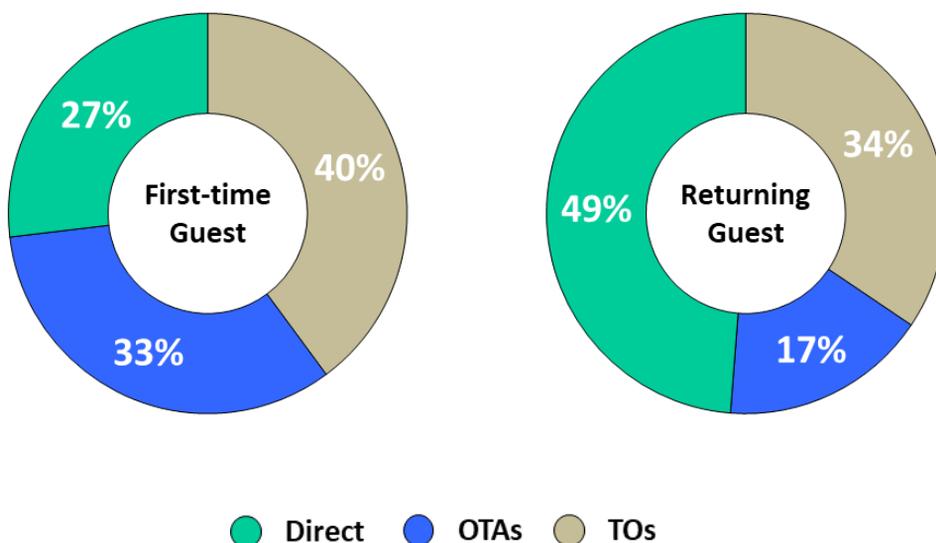
Reducing sales dependence on OTAs and tour operators, and increasing room reservations through in-house sales channels, is the common goal of most hotel companies in the short and medium term.

With new technologies, we have access to more and better knowledge about potential guests. We know where to find them, how to attract them to our platform and what their needs and means are, and we can even persuade them to buy based on the profile created by our AI.

At **GesHotels** we know that the team at your hotel plays a huge role in direct sales. We know that by measuring you guests' experiences, you can implement specific actions and analyse the results obtained year after year.

This month, we have analysed how Spanish first-time and returning guests make their purchases. As shown below, in hotels that measure customer experience with **GesHotels**, one out of every two Spanish returning guests books through the company's direct channel, thus reducing reliance on OTAs by 49% and on tour operators by 15%.

Spanish guests



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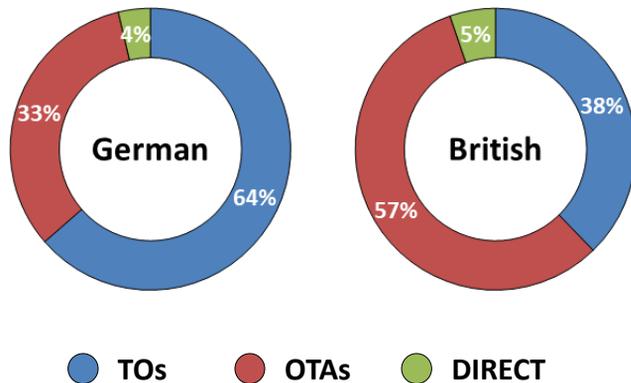
SALES & MARKETING STUDY

14. Analysis of the booking preferences of European source markets.

Achieving the company’s occupancy targets requires a good distribution strategy. Every product may have one or several simultaneous targets; however, as each has certain booking preferences, a different strategy is needed for each one.

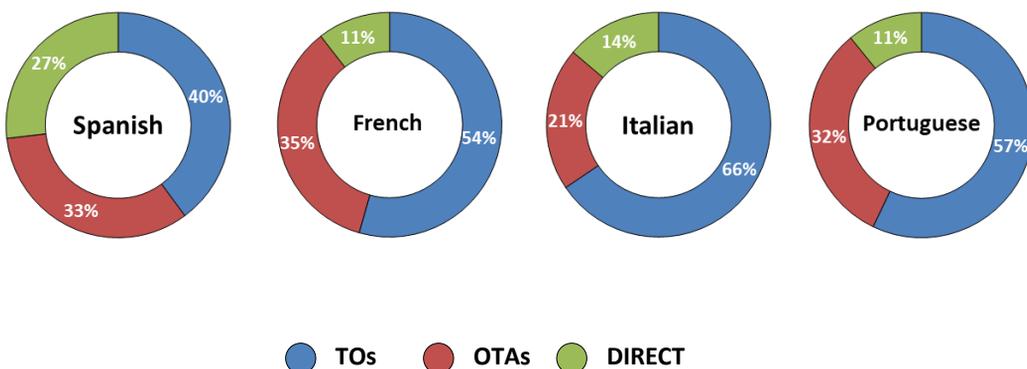
At **GesHotels** we have analysed the information provided by more than three million guests this year to study how the booking process is distributed in each of the European source markets.

Although the German and British markets lead our ranking in terms of tourist numbers, their booking preferences vary considerably.



Whereas the German market books through conventional tour operators 64% of the time, for the British market this figure is 38%, as British tourists have a stronger preference for OTAs, at 57% of all bookings.

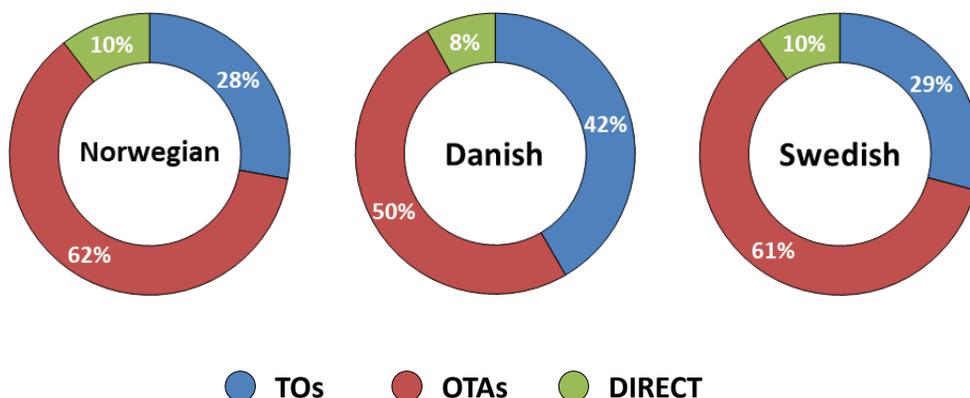
The following are destination and source markets. The graphs show less reliance on intermediaries than in exclusively source markets. A total of 36% of Spaniards book directly with the company.



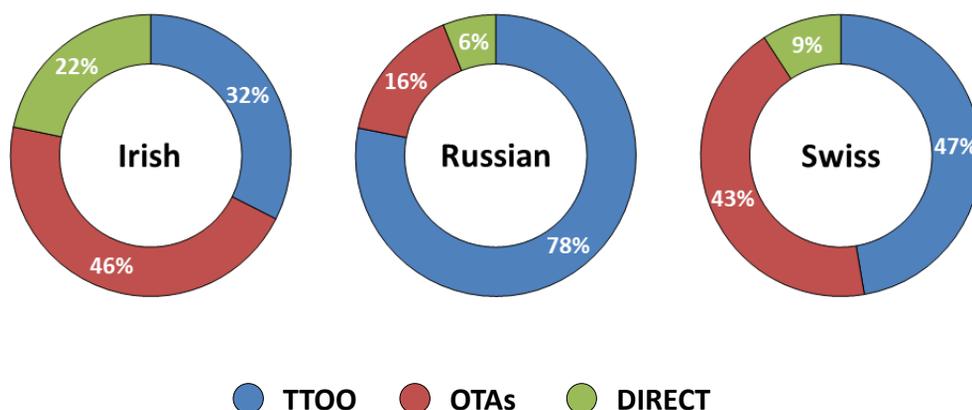


SALES & MARKETING STUDY

Analysis of the Scandinavian market shows online travel agencies are the most widely used distribution channel, with conventional tour operators (TOs) in second place.



Other markets analysed are: Ireland, which has a high volume of direct bookings, Russia, with heavy reliance on conventional tour operators, and Switzerland, where 91% of tourists book through tour operators and OTAs, and 9% directly with the company.



As mentioned on previous occasions, achieving occupancy and profitability targets is simple when the appropriate information is considered.



PUBLICATIONS AUGUST

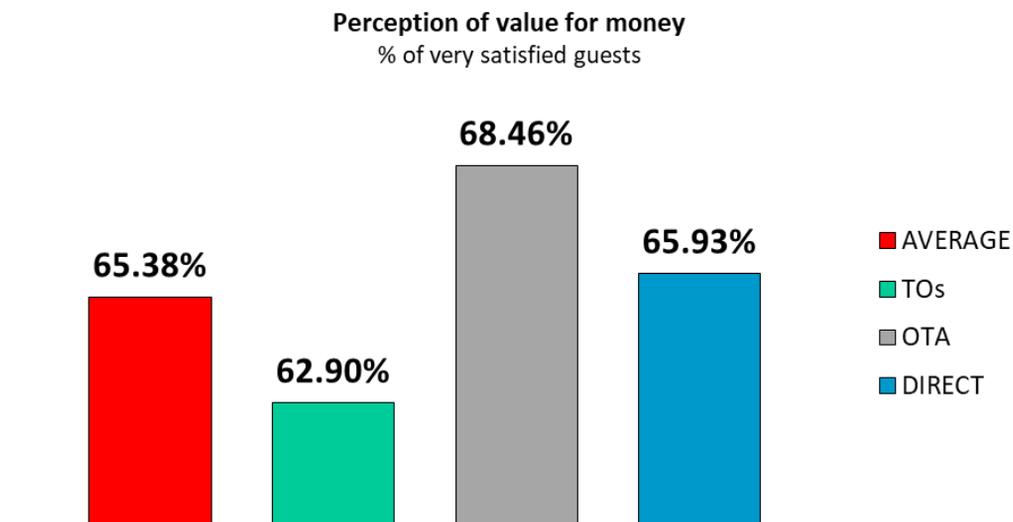




15. Analysis of the perception of value for money based on the sales channel.

Customer satisfaction is directly related to expectations created when making the decision to purchase. At **GesHotels** we have analysed over 3.5 million guests' perceptions of whether their stay represented value for money and we have segmented the results by the sales channel they used.

Below we detail the percentage of very satisfied guests based on the sales channel they used:



On analysing the percentage of very satisfied guests, we can observe how OTA guests have the best perception of value for money; specifically, 68.46% consider they paid for less than they received. The most demanding guests, however, booked their hotel through a TO. In this case, only 62.90% of guests view the hotel's value for money as very positive. The intermediate point, with 65.93% of guests very satisfied with their purchase, is represented by guests who booked directly through one of the company's direct channels.

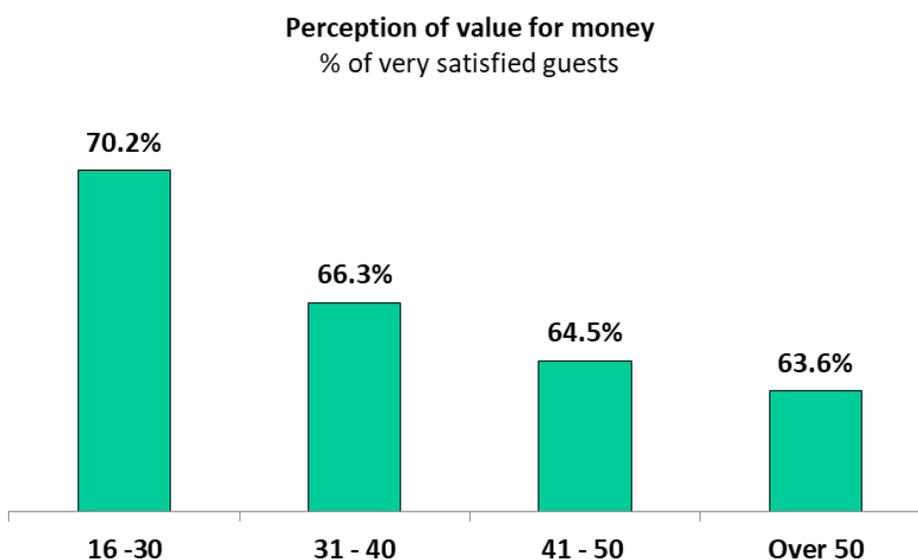
By analysing business opportunities based on guests' perception of value for money we can discover whether we can raise rates while still maintaining an optimal level of guest satisfaction.

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16. Comparative analysis of the perception of value for money by age.

A customer's perception of value for money is closely linked to their expectations, and these, in turn, besides some other factors, depend on the customer's previous experiences. Consequently, we wanted to analyse the relationship between the guest's age and their perception of the rate they paid in relation to what they received for it.



As can be seen in the graph, the highest percentage of very satisfied guests is aged between 16 and 30. Specifically, 70.2% of guests say they are very satisfied with the rate they paid in relation to what they received.

After this first block, we can see how the percentage of very satisfied guests decreases as the age of the guest rises.

Studying whether rates can be raised by analysing different guest types' perception of value for money helps to optimise income per available room while maintaining the desired level of satisfaction at all times. Too high a KPI in the perception of value for money shows that the product rate can be increased to return to a balanced KPI.



PUBLICATIONS SEPTEMBER



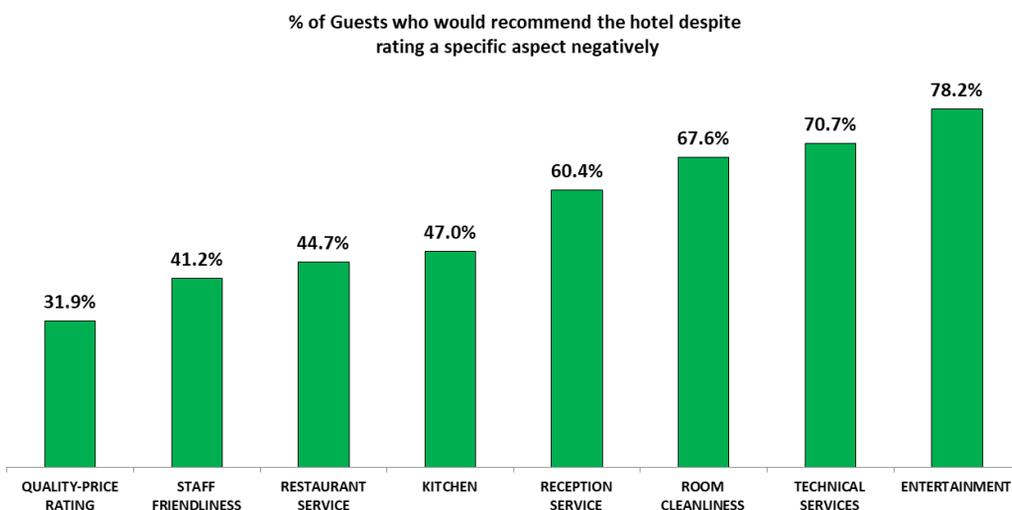
GesHotels[®]



17. Analysis of how the hotel's aspects influence guests' final decision to recommend their stay.

Obtaining the highest number of influencer guests is one of the main objectives of hotel companies to improve their competitiveness in the market and to make the running of the hotel more profitable.

At **GesHotels** we have analysed which of the hotel's aspects most influence a guest's final decision to recommend their stay. To this end, we have studied the responses of all guests who finally decided to recommend the hotel despite having rated a specific aspect negatively. We have obtained the following ranking using this method:



Based on our study, the aspect that most influences guests to recommend their stay is the quality/price rating since only 31.9% of guests who rated this aspect negatively finally decided to recommend the hotel. The department that least influences guests' decisions to recommend the hotel is entertainment since 78.2% of guests who rated this department negatively recommended their stay.

Analysing which of the hotel's aspects have the most influence on a guest's final decision and, therefore, on obtaining influencer guests helps focus resources on improving these aspects to make occupancy more profitable.

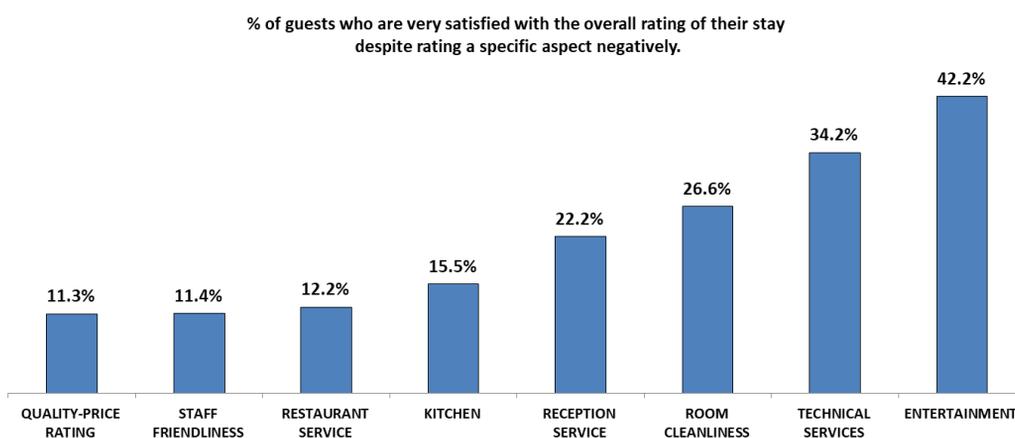


18. Analysis of how the hotel's aspects influence guests' overall rating of their stay.

At **GesHotels** we colloquially define a guest's overall rating of their stay as the "aftertaste" that the guest takes with them when they leave.

The overall rating is the perception that drives a guest to repeat their stay, to recommend the hotel to their friends and family or even to post a positive or negative comment on social media.

As we know how important this point is, we have analysed which of the hotel's aspects most influence a guest's overall rating of their stay. To this end, we have analysed all guests who rated the overall perception of their stay as "Very positive" despite having rated a specific aspect negatively. We have obtained the following ranking using this method:



As you can see in the above graph, the aspects that most influence guests when forming their overall impression of their stay are: firstly, the price they paid for what they received; secondly, how they are treated by the hotel's team; and, finally, food as the last of the three aspects that are most important to guests.

More tangible aspects such as room cleanliness or technical services seem to have less influence on overall guest satisfaction.

Knowing which aspects most influence each establishment's guests helps to optimise the hotel's resources when trying to improve guest satisfaction indicators.



PUBLICATIONS OCTOBER



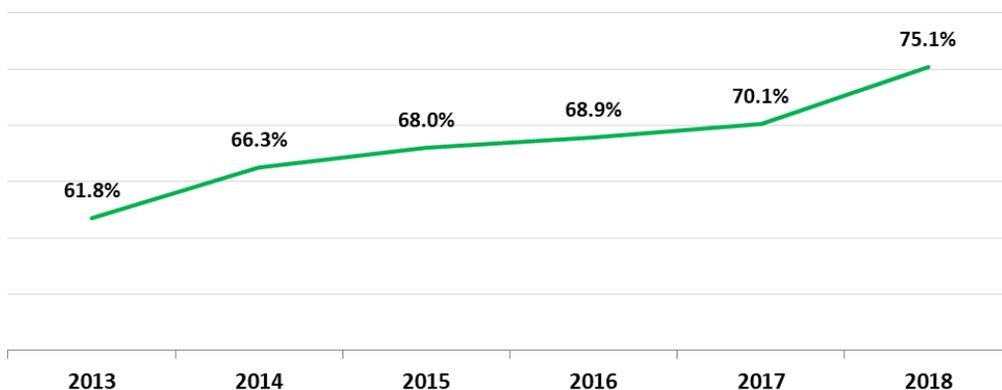


19. Analysis of how guests' overall perception of their stay has evolved in recent years.

Periodically measuring the experience of a representative percentage of guests, identifying areas for improvement and adopting specific measures through our **GesHotels Fidelity Express** system, with the aim of implementing a continuous improvement plan, help us improve not only guest satisfaction indicators year after year, but also our company's bottom line.

This time we wanted to measure how guests' overall perception of their stay has evolved in a cluster of more than 1,000 holiday hotels where we periodically measure guest experience through our **GesHotels Guest Experience** service.

Evolution of guests' overall perception of their stay
% of guests who rated their stay very positively



As you can see from the graph, the trend in the past six years is clearly upward, with an upturn in the percentage of guests who rated their stay as very positive of 13.3 points between 2013 and 2018.

These magnificent results are due to the efforts made by all the teams participating daily in the continuous improvement of their processes using the Fidelity Express method.

Managing an organisation on a daily basis, focusing on constantly exceeding guests' expectations, relying on objective, spontaneous and reliable data, receiving a roadmap to follow in a methodical and structured way allows teams to achieve satisfaction and profitability objectives organically and sustainably.

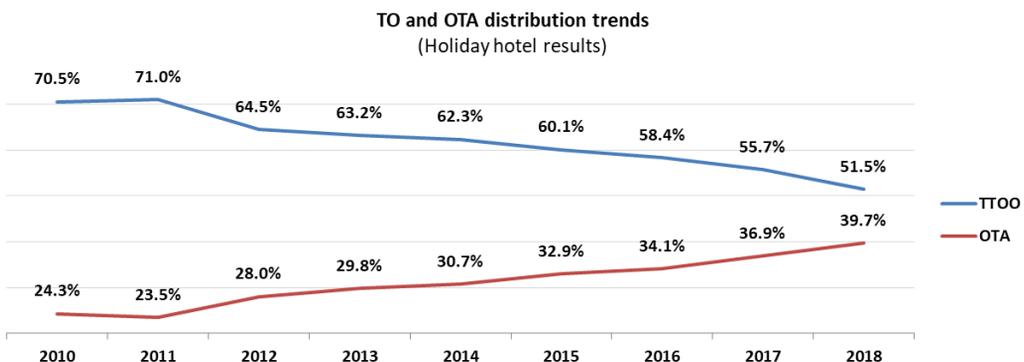
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20. Analysis of TO and OTA distribution trends in recent years.

2019 is undoubtedly turning out to be a bad year for conventional tour operators. The most significant event has been the collapse of the British tour operator Thomas Cook, which has, to varying degrees, impacted every company directly or indirectly related to tourism.

Consequently, at **GesHotels** we wanted to analyse how the two main holiday hotel distribution channels have evolved in the past nine years. To this end, we analysed the responses of millions of guests who fill out our questionnaires every year through our **GesHotels Guest Experience** service.



As you can see in the graph, the upward trend of OTAs over the past nine years has cut 15.4 points off the conventional TOs, which, dropping 19 points, have distributed a large percentage of their business to OTAs and direct sales channels.

Despite their loss in distribution volume, conventional tour operators still have 51.5% of the distribution. Nevertheless, the fact that the business model appears to be changing is undeniable and in a few years we might see OTAs taking over from TOs as the main holiday hotel distribution channel. Or perhaps not, especially if the distribution giants surprise us with an unexpected initiative or measure.

SEDE CENTRAL
Martí Costa, nº 2 - 1ª planta
07013 Palma de Mallorca
Teléfono 971 220 081
E-mail: grupoges@grupoges.es
www.grupoges.es



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