



ROOMRACCOON
cloud hotel management



World's
Best Hotel Channel
Manager

BOOKING CHANNEL TRENDS

Booking.com ✓

EUROPE

2024

Google Hotel Ads ✓

 **Expedia** ✓



 **airbnb** ✓

hotelbeds ✓

 **HOSTELWORLD** ✓

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The battle between online travel agencies (OTAs) and direct is always a hot topic!

Whether you're a fan or not, OTAs are a crucial component of every property's distribution strategy. In fact, close to 50% of all bookings captured through RoomRaccoon's system from 2022 to 2024 came from indirect sources.

On the flip side, direct bookings accounted for over 50% of all online reservations during the same period, proving that this commission-free channel remains a powerful force for hoteliers.

The key lies in finding the perfect balance for your property.

In this report, we've analysed over 3.9 million reservations from over 2000 boutique hotels to reveal the latest trends in booking channels across Europe. We'll walk you through the optimal channel mix for independent hotels in regions like the BENELUX, DACH, Iberia, Italy, and the UK.

Plus, we'll dive into the technology that helps hotels efficiently manage inventory and rates across various channels, including their own websites, to ensure a robust and effective distribution strategy that drives more reservations and significantly increases hotel revenue.

Emerging Trends in EU Booking Channels

Direct Bookings Dominate

In European markets, there has been a significant increase in the confidence levels of customers completing bookings directly with the property. This trend was particularly pronounced from 2022 to 2024, during which over 50% of all bookings were made either directly or through the hotel's booking engine.

This shift towards direct bookings is not just a matter of convenience but also a strategic advantage for both travellers and properties.

For travellers, booking directly through hotel websites often means access to the best available deals, exclusive offers, and more personalised customer service.

Hotels benefit from this trend by bypassing third-party commissions, leading to a substantial increase in revenue. Overall, the increase in direct bookings reflects a broader trend of travellers seeking the best deals and more personalised experiences by choosing to book directly through hotel websites.

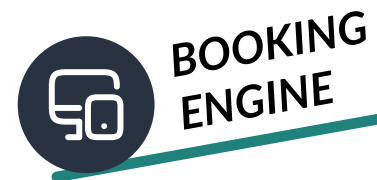
Leveraging OTA Giants

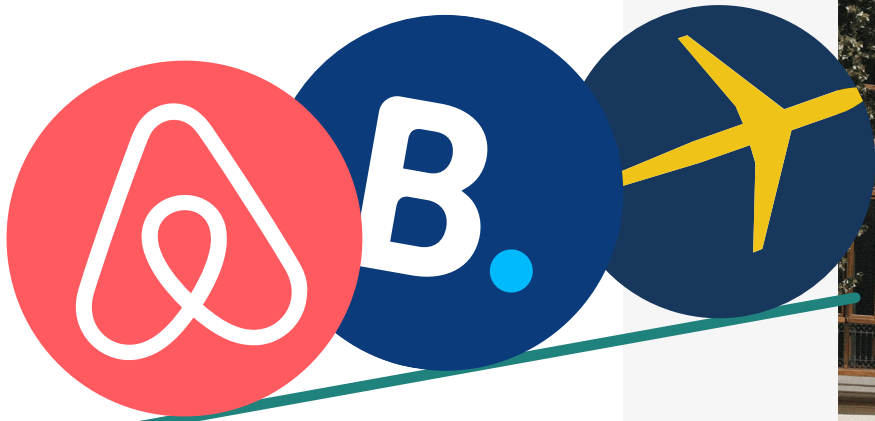
The well-known OTA giants Booking.com, Expedia and Airbnb remain the most popular OTAs for travellers. For most, planning a holiday starts with browsing online and comparing properties.

Popular OTAs offer new and old travellers a sense of familiarity and security when booking online.

Listing your property on OTAs provides valuable brand visibility and reaches global audiences.

All third-party booking channels, including OTAs, charge commissions and variable costs for their services. So while they are valuable partners, ideally you'll want to funnel most of your bookings to your hotel website. Direct bookings mean no commission, no hidden costs and more opportunities to connect with guests.





The Strategic Importance of Wholesalers

While wholesalers are not one of the top booking channels, they still offer valuable benefits to hotels of all sizes.

Wholesalers or bedbanks are multinational and have longstanding travel networks, meaning your property gets maximum exposure.

Hotelbeds is a popular bedbank and operates across 185 countries, so the reach for your property is undeniable.

Since bedbanks buy hotel rooms in bulk at discounted rates and resell them to distribution partners, hotels can manage inventory more effectively. This can be particularly useful during off-peak or shoulder seasons, reducing the risk of unsold rooms.





Local Booking Channels

In our market analysis, we see that local booking channels are becoming more prevalent in the booking channel blend. Local OTAs are focused on meeting the specific preferences and behaviours of local markets, which makes hotels more appealing and accessible to local and regional travellers.

These channels offer personalised service, customised promotions, and relevant content that connects with local customers.

Moreover, localised booking channels often have established trust and brand recognition within their markets, which encourages bookings and customer loyalty.



NEW TREND ALERT

Outshine OTAs with Google Hotels

Google Hotels is a steady contender as a top booking site, ranking as the **5th most popular channel in Europe**. It's a powerful tool for boosting the visibility of your direct booking rates, connecting directly with travellers, and competing head-to-head with OTAs.

With Google Hotels Ads, you can drive traffic straight to your website, which should be equipped with a booking engine. This will give guests a personalised booking experience and give you full control over the booking process and data collection.

All you need to know: with Google Hotels, you enhance the visibility of your direct rates and compete with OTAs by advertising alongside them.



Reclaim Your BRAND NAME

More importantly, Google Hotels helps you capture traffic from direct brand name searches. For instance, when a traveller hears about your property or finds your listing on an OTA and then searches for it on Google, your Google Business Profile typically appears with an extended hotel search module.

If you're running Google Hotel Ads, this module will prominently display your direct booking rate at the top of the results, along with key information from your website, boosting visibility and encouraging direct bookings.

This highlights the importance of incorporating Google Hotel Ads into your distribution strategy to prevent OTAs from diverting traffic away from your property's direct search results.

Example of the booking journey of an OTA customer

AWARENESS

1

The user enters the OTA and searches for hotels in London.

2

He finds Hotel XYZ, which he likes and fits his preferences.



COMPARISON

3

Before booking, he goes to Google and searches for "Hotel XYZ London" to find out how to get to the hotel, what transportation options are nearby, etc.

4

He discovers price disparities thanks to Google Hotel Ads.



DECISION

5

Clicks on the Google Hotel Ads results to learn more about price differences.

6

Finally, he makes the booking on the website offering the most economical price.

RoomRaccoon is a Google Hotel Ads connectivity partner, and you only pay for completed stays!

Breaking Down the Most Popular Booking Channels

Europe overview



In Europe, travellers are increasingly choosing to book directly with properties. From 2022 to 2024, over **50% of bookings were direct**. With RoomRaccoon's commission-free booking engine, hotels can keep more of their reservation revenue.












The ranking of booking channels has remained consistent. Although direct bookings are the preferred choice for travellers, the major OTAs – Booking.com, Expedia and Airbnb – still hold strong positions in the top five.

The most popular booking channel types from 2022-2024:

1. Direct and booking engine
2. Online Travel Agencies
3. Metasearch (namely Google Hotel Ads)
4. Wholesalers
5. Global Distribution System

In 2023-2024, reservations through Booking.com increased by 30% compared to the previous period, while Expedia saw a 57% rise. OTAs are still popular, offering travellers a convenient booking experience.

Hotelbeds' bookings went up by 65%, showing a rebound in business travel, while Hostelworld's increased by 76% and Airbnb's by 8%.

2022 - 2023	2023 - 2024
1 st  Direct	1 st  Direct
2 nd Booking.com	2 nd Booking.com
3 rd  Expedia	3 rd  Expedia
 airbnb	 airbnb
Google Hotel Ads	Google Hotel Ads
hotelbeds	hotelbeds
 HOSTELWORLD	 HOSTELWORLD
 Voordeeltjes.nl	 HRS 

* This EU booking channel data is based on 2000 RoomRaccoon hotels.















BENELUX Region

Hotels across Belgium, the Netherlands, and Luxembourg experienced a remarkable **192% increase in bookings from 2023 to 2024**. So, how are the influx of travellers booking their stays?

Booking.com has emerged as the number one booking channel, surpassing direct bookings. Airbnb has seen a noticeable uptick, indicating a growing preference for vacation rentals. Local favourites like Voordeeluitjes and BedandBreakfast.nl continue to hold their ground, proving that local charm is still in demand.

Additionally, there is a new contender in the top 8 booking channels of BENELUX: Egencia. As a corporate travel solution leveraging a wide network of global distribution system aggregators, Egencia is facilitating budget-friendly business travel, hinting at a resurgence in corporate bookings.

2022 - 2023	2023 - 2024
1 st  Direct	1 st Booking.com ▲
2 nd Booking.com	2 nd  Direct ▼
3 rd  Expedia	3 rd  Expedia
Google Hotel Ads	 airbnb ▲
 airbnb	Google Hotel Ads ▼
 Voordeeluitjes.nl	 Voordeeluitjes.nl
 bedandbreakfast.eu	 EGENCIA ▲
 natuurhuisje	 bedandbreakfast.nl ▼















DACH Region

Hotels in the DACH region—Germany, Austria, and Switzerland—saw a 15% increase in bookings year over year. Direct reservations remain the preferred booking channels. Notably, Expedia has overtaken Airbnb to claim a spot in the top three booking channels.

Aside from the big three OTAs (Booking.com, Expedia, Airbnb), the **preferred booking channels are highly localised for German customers**. HRS and Tomas, both uniquely German booking channels, indicate a strong level of domestic travel. Additionally, Egencia remains a stable booking channel in the DACH market, catering to corporate travel bookings in the region.







This localisation and diversification highlight the importance of tailoring booking strategies to regional preferences to maximise reach and profitability.

2022 - 2023	2023 - 2024
1 st Booking.com	1 st  Direct ▲
2 nd  Direct	2 nd Booking.com ▼
3 rd  airbnb	3 rd  Expedia ▲
 HRS	 HRS
 Expedia	 airbnb ▼
Google Hotel Ads	Google Hotel Ads
 TOMAS[®] TOURISTIC ONLINE MANAGEMENT SYSTEM PLUS	 Kurzwego.de ▲ mehr als eine Übernachtung
 Kurzwego.de mehr als eine Übernachtung	 TOMAS[®] TOURISTIC ONLINE MANAGEMENT SYSTEM PLUS ▼

Italy

In Italy, travellers' preferred booking channels remained consistent from 2022 to 2024. While reservations through Booking.com increased, **direct bookings retained the top spot**. Booking.com's slight market share rebound can be attributed to its [legal settlement](#) with the Italian Revenue Agency.

Hotels and properties that had previously removed their listings from Booking.com in support of Italy's stance have reconnected with the popular OTA. The usual suspects appear in the top five, with Expedia, Google Hotel Ads, and Airbnb remaining favourites.

2022 - 2023	2023 - 2024
1 st  Direct	1 st  Direct
2 nd Booking.com	2 nd Booking.com
3 rd  Expedia	3 rd  Expedia
Google Hotel Ads	Google Hotel Ads
 airbnb	 airbnb



Spain

Independent hotels in Spain recorded a remarkable **75% increase in bookings year-over-year**, with their top 5 booking channels maintaining stable rankings. There has been a **10% increase in direct reservations**, demonstrating that hotels have successfully implemented more direct booking strategies.

Expedia has also gained popularity in reservations, likely due to its expanded travel partnerships in 2023. The Expedia group has connected with Iberia Airlines and Record Go car rental company, forging stronger relationships with Spanish businesses and enhancing its local presence.

2022 - 2023		2023 - 2024	
1 st	Booking.com	1 st	Direct ▲
2 nd	Direct	2 nd	Booking.com ▼
3 rd	hotelbeds	3 rd	hotelbeds
airbnb		airbnb	
Expedia		Expedia	



Portugal

Travel in Portugal has remained steady, with a **12% year-over-year increase in reservations**. Booking.com continues to dominate as the leading booking channel for travellers in Portugal, followed by direct bookings, with Expedia in third place. Airbnb ranks fourth, showing that vacation rentals remain a popular choice for guests.

An interesting addition to the top five is Hostelworld, indicating a high demand for hostel accommodations among travellers in Portugal. Approximately 70% of hostel bookings are made online, outperforming other accommodation types. Google Hotel Ads and Agoda maintain strong positions in 6th and 7th place, respectively. Recently, Mr & Mrs Smith was replaced by Hotelbeds in the top rankings.

2022 - 2023

1st Booking.com

2nd Direct

3rd Expedia

airbnb

HOSTELWORLD

2023 - 2024

1st Booking.com

2nd Direct

3rd Expedia

airbnb

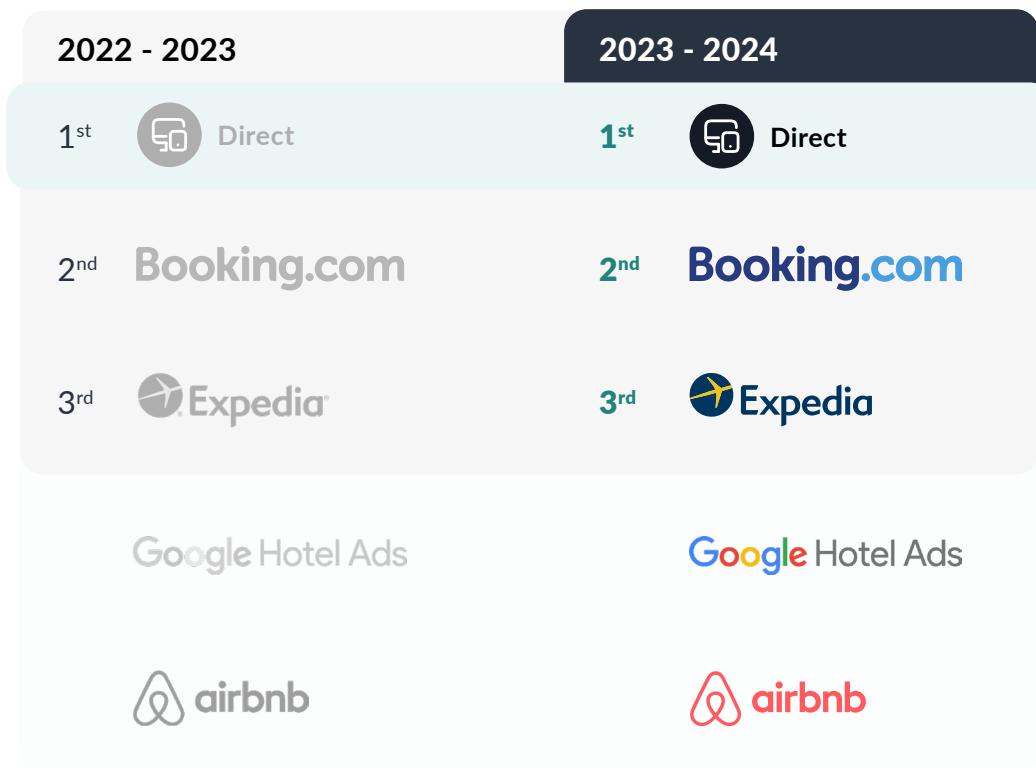
HOSTELWORLD



United Kingdom

The preferred booking channels for guests travelling to UK properties are **direct bookings** with the property, which **have seen an impressive increase in booking share from 48% to 60%**. This significant shift away from Booking.com indicates that more travellers are discovering better rates and more personalised experiences when booking directly with the property.

This trend highlights the growing importance of direct engagement and the value that hotels can offer through their own booking platforms.





Best Practices for Optimal Distribution Strategies

To create an optimal booking channel mix, start by analysing your [property's performance reports](#) to understand guest demographics, preferred channels, booking lead times, and patterns. Regularly monitor the performance of different OTAs to assess conversion rates, booking volumes, and costs. This ongoing analysis will enable you to adjust your channel mix effectively and enhance overall booking efficiency.

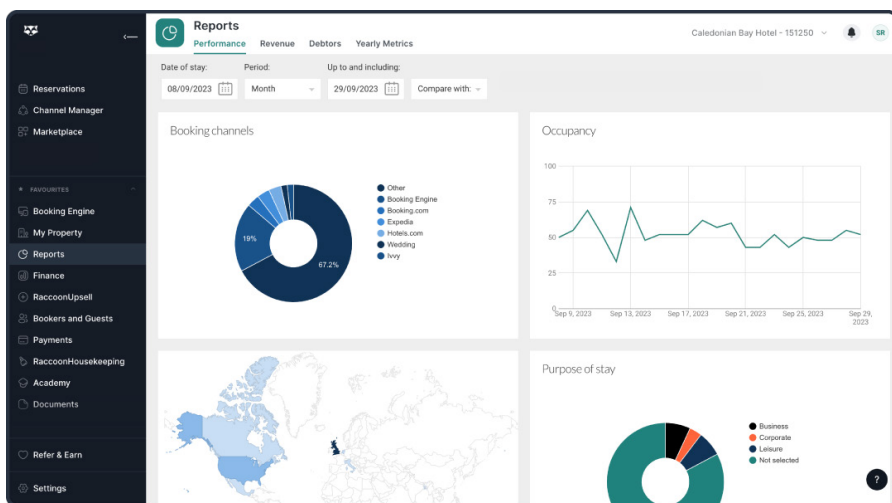
Consider Your Property's Goals

Every hotel has unique goals based on its market position, target audience, and overall business strategy. These goals can range from maximising occupancy, increasing average daily rate (ADR), and enhancing brand recognition to targeting specific guest segments.

By aligning distribution strategies with these goals, you can ensure your efforts are directed towards achieving the desired outcomes. Different distribution channels (OTAs, direct bookings, GDS, etc.) serve different purposes and reach different audiences. Understanding your property's goals helps you select the right mix of channels.

Maintain a Competitive Edge

Keeping your rates competitive is crucial for a winning distribution strategy—otherwise, your closest competitors might snag your bookings. Using a [CompSet dashboard](#) makes it easy to compare your rates with theirs. You'll get daily updates on competitor pricing, and with the right tools, you can even set up automatic adjustments to stay ahead. Make sure no opportunity slips by!



Create a Custom Channel Mix

Hotels and properties should use a combination of global, regional, and B2B travel networks to ensure they can reach a wide audience and take advantage of different market segments. This strategy not only increases visibility and booking potential but also helps boost direct bookings through the [billboard effect](#) – a phenomenon where OTA listings act as an online billboard to promote your property, ultimately increasing traffic to your website.

Incorporate Popular OTAs

Listing your property on OTAs for their broad reach and exposure to a vast audience from different locations increases booking chances. The established reputation of OTAs makes travellers comfortable booking on these sites.

Add Targeted Regional OTAs

Regional OTAs specialise in specific geographic markets, allowing your hotel to effectively target and connect with travellers in those areas. This localised reach ensures your hotel is visible to the right audience, enhancing cultural relevance and strengthening your market share in key regions.

Include Bedbanks and Other Travel Wholesalers

Bedbanks connect you to a broad network of OTAs, tour operators, and travel agencies, expanding your reach without direct relationships. By selling rooms in bulk at fixed, discounted rates, you can secure guaranteed income for specific dates and reduce the risk of unsold inventory.

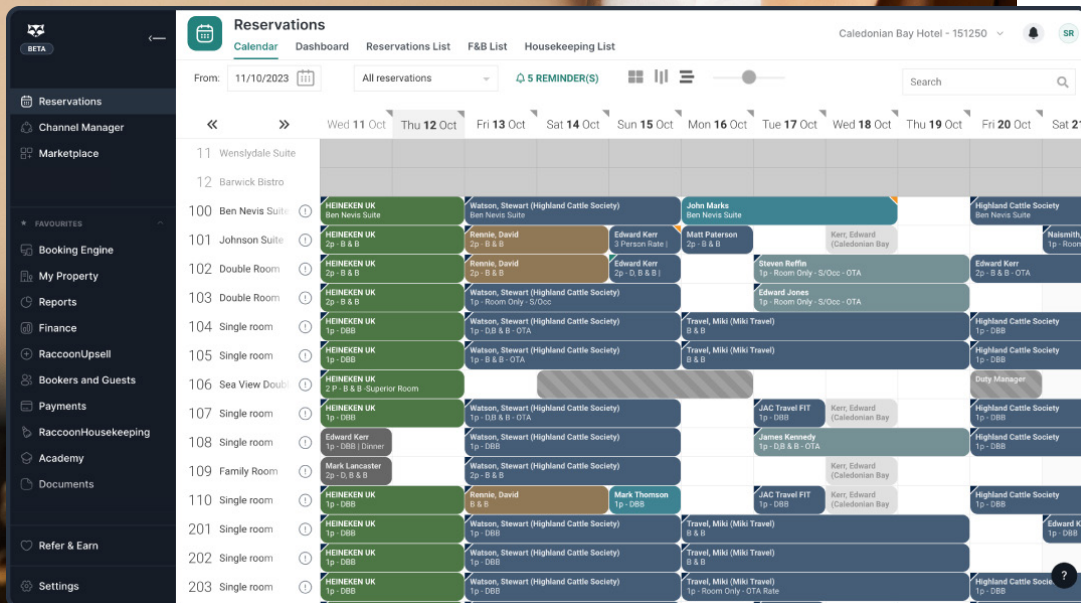
Choose a PMS with an integrated channel manager

On average, RoomRaccoon partners connect to **three third-party booking channels** in addition to their direct booking engines. Managing inventory and rates across multiple distribution channels is complex and typically no longer handled manually.

RoomRaccoon's hotel management system (HMS) with an integrated channel manager is one of the fastest in the industry. It synchronises in just 5 seconds and has a two-way connection to global and regional OTAs and travel wholesalers.

Centralising your channel management eliminates overbookings, enhances rate management, and ensures your team has access to up-to-date information quickly and accurately.

BOOK A DEMO



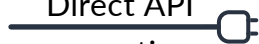
RoomRaccoon Channel Manager

Superior Features, Seamless Distribution

5-second synchronisation



Direct API
connections



Centralised VCC
management

Channel
specific pricing

One-click single or
bulk rate updates



Channel reports &
insights



Price
comparison
widget



Zero-added
commission



Over 200+
booking channels



Summarising & Simplifying the Top Channels

Explore a few of the top booking channels preferred by European independent hotels.



Hotel Booking Engine (direct)

Best for: All accommodation types who'd like to reduce their reliance on third-party channels for bookings.

Countries: Available Globally.

Commission: RoomRaccoon offers 0% commission and no hidden costs

Good to know: With RoomRaccoon's real-time availability and a seamless 5-step booking process, guests can enjoy a consistent, personalised brand experience that surpasses OTAs.

[LEARN MORE](#)



Best for: Popular for home share listings, apartments, guesthouses and vacation rentals

Countries: Airbnb operates in 220 countries with 7.7 million + listings

Commission: Host fee of 3% and 14% guest fee – read our host fee guide.

Good to know: 77% of users surveyed said they choose Airbnb because they get to live like locals.

[LEARN MORE](#)



Best for: All accommodation types

Countries: 300,000 properties covering 195 countries across the world

Commission: Average 21%

Good to know: Hotelbeds is the most popular B2B solution for wholesalers and supply partners

[LEARN MORE](#)



Best for: Ideal for all types of accommodation providers. From boutique hotels to luxury tents and everything in between.

Countries: Available in over 45 different languages and offers 29 million listing across 227 countries.
Commission: Average of 15% and more, depending on your market.

Commission: Average of 15% and more, depending on your market.

Good to know: Travellers trust Booking.com, the website has over 311 million verified guest reviews

[LEARN MORE](#)

What's new?

Booking lifts the Rate Parity rule in the EU.

Booking's recent decision to remove its rule that stopped hotels from offering lower prices on their own websites than on its platform will be a big win for independent hotels in the EU. Although Booking and other OTA giants are important for gaining visibility and attracting international travellers, independent hotels can now enjoy additional benefits and implement complementary strategies to compete with OTAs for direct bookings.

1. Enhance online presence

According to Skift, only 64% of hotels globally have a booking engine, leaving 36% unable to capture direct reservations online. Hotels aiming to reduce reliance on OTAs and boost revenue should invest in a well-optimised website, a commission-free booking engine, and marketing partners such as Google Hotels.

2. Access more guest data

When guests book directly, hotels gain valuable data before their stay. This not only enhances the guest experience with tailored touches but gives hotels the perfect opportunity to fine-tune their marketing efforts by focusing resources on profitable segments.

3. Outpace OTAs undercutting tactics

OTAs constantly adjust their prices to stay competitive and attract more bookings. To truly capitalise on the freedom granted by Booking's new policy, hotels can implement similar [dynamic pricing tools](#) to ensure their direct rates are competitive without undercutting their own profitability.





Best for: Big and small hotels, bed & breakfasts, motels, and others.

Countries: Google owns 90% of the search market worldwide.

Commission: Varies based on the booking module: cost per click or commission models (average 12% per conversion bid.)

Good to know: Google Hotel Ads have higher conversion rates and lower costs per conversion than other digital traffic sources.

[LEARN MORE](#)



Best for: Ideal for all types of accommodation providers. Big and small hotels, B&Bs, hostels and a special emphasis on vacation rentals.

Countries: Expedia operates in over 70 countries and in over 35 different languages.

Commission: Average of 15% to 18%, depending on the payment model.

Good to know: Expedia has over 675 million monthly visits.

[LEARN MORE](#)



Conclusion

While direct bookings remain a strong contender in most markets, the popularity of OTAs continues to rise each year. To stay ahead, independent hotels will need to keep investing in direct channels – like their website, booking engine, and Google Hotels – to avoid excessive reliance on OTA bookings that eat into revenue.

By leveraging a blend of indirect booking channels, independent hotels can boost their online visibility across different regions and audiences. But that's not all—an optimised channel mix doesn't just bring in more travellers; it also steers them toward your website and booking engine, thanks to the billboard effect. This boosts direct bookings and, in turn, increases your revenue by bypassing OTA commission fees.

To supercharge your strategy, adopting an all-in-one HMS with an integrated channel manager is essential. This not only streamlines your operations but transforms your distribution strategy into a powerhouse.

By weaving these insights into your approach, you'll be equipped to navigate the ever-evolving booking landscape confidently, driving more reservations and significantly increasing hotel revenue.



About RoomRaccoon

RoomRaccoon is the leading hotel management platform powering thousands of successful independent properties. The cloud-based platform includes category-redefining products and solutions to increase revenue, streamline operations, and enhance the guest experience. With over 400 integrations, RoomRaccoon is one of the most connected solutions on the market.

The intuitive platform combines a PMS, channel manager, booking engine, and a wide range of modules and upgrades for payments, housekeeping, reporting, and digital guest services. All of these tools are seamlessly integrated, allowing you to manage your operations from a single, easy-to-use interface.

RoomRaccoon was awarded the Best Hotel Channel Manager in 2023 by the World Travel Tech Awards.

Experience the power of RoomRaccoon's channel manager and all-in-one hotel management first-hand when you book a demo.

BOOK A DEMO

