



Q3 2025 Global Multi-OTA Benchmark Report

A Fact-Based Analysis of Content, Feedback, and Promotional Strategies of Large 5-Star Hotels Across Major Global OTAs

Date: November 2025

Period of Analysis: Q3 2025 (July - September) & November 2025 Projection

Prepared by: Berlin Hotel Lab

ABSTRACT

This research paper investigates the digital distribution behaviors of large 5-star hotel properties across the world's fifty busiest travel destinations. By analyzing a dataset of 2,500 luxury hotels, 820,000 rooms, and over 1.2 million visual assets, this study evaluates how high-end hospitality providers utilize the four dominant Online Travel Agencies (OTAs): Booking.com, Expedia.com, Agoda.com, and Trip.com.

1. INTRODUCTION

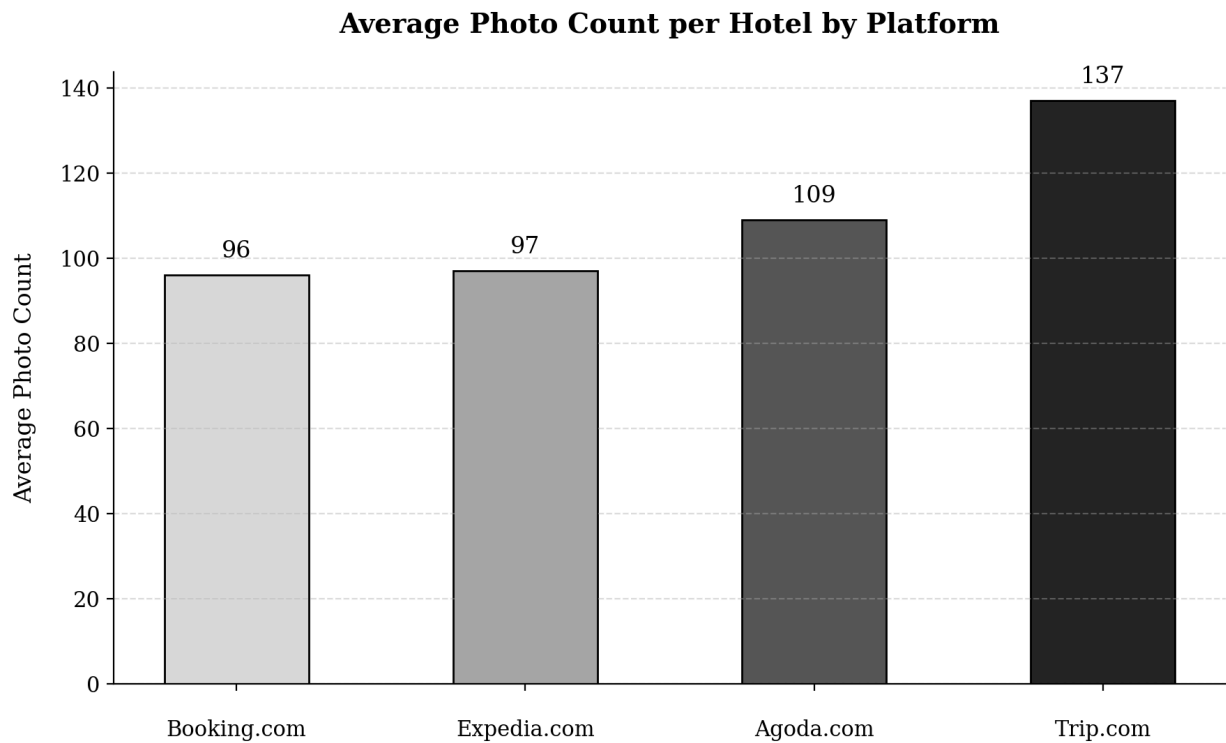
- 1. Brand Integrity (Content):** Ensuring the hotel looks equally prestigious on all platforms.
- 2. Commercial Strategy (Pricing):** Using discounts intelligently to drive revenue.

This study aims to understand if hotels are succeeding in these two areas. We analyzed data from Q3 2025 to answer:

- Do hotels maintain visual consistency?
- And how do they use Mobile and Membership discounts differently across platforms?

PART 1: VISUAL ASSET MANAGEMENT (BOOKING.COM & EXPEDIA.COM)

A hotel's online photo gallery is its "digital twin." Our analysis found a surprising lack of attention to detail in this area.



The 70% Inconsistency Problem:

At first glance, Booking.com (96 photos) and Expedia (97 photos) seem to have similar content depth. However, when we compared individual hotels, we found that nearly 70% of properties had significant differences in the actual photos used on these two platforms.

This means only 30% of large 5-star hotels are actively managing a consistent brand image. For the majority, content management appears to be a static, manual task that is often neglected, leading to a disjointed user experience.

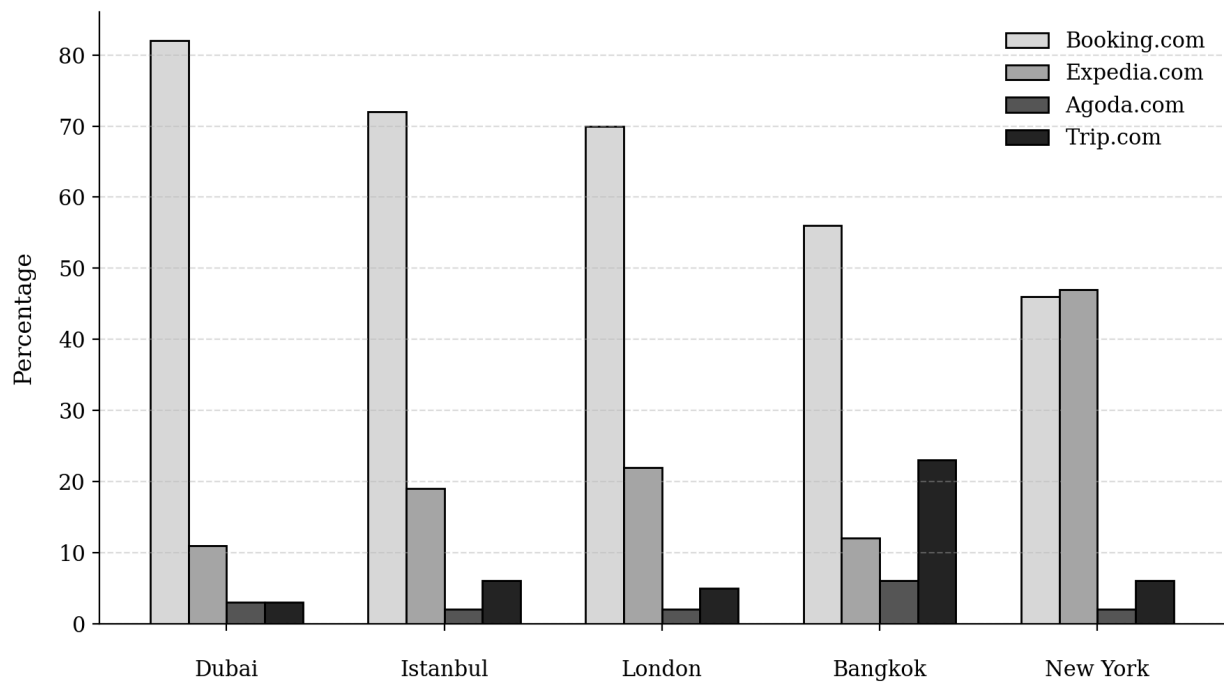
PART 2: MARKET DOMINANCE (GUEST FEEDBACK Q3)

Review volume is a strong indicator of where bookings are actually coming from. We analyzed the market share of reviews in key global cities.

Table 2.1: Review to Total Capacity by City

City	Percentage (%)
New York	0.5%
Istanbul	0.9%
Bangkok	1.1%
Dubai	1.2%
London	1.3%

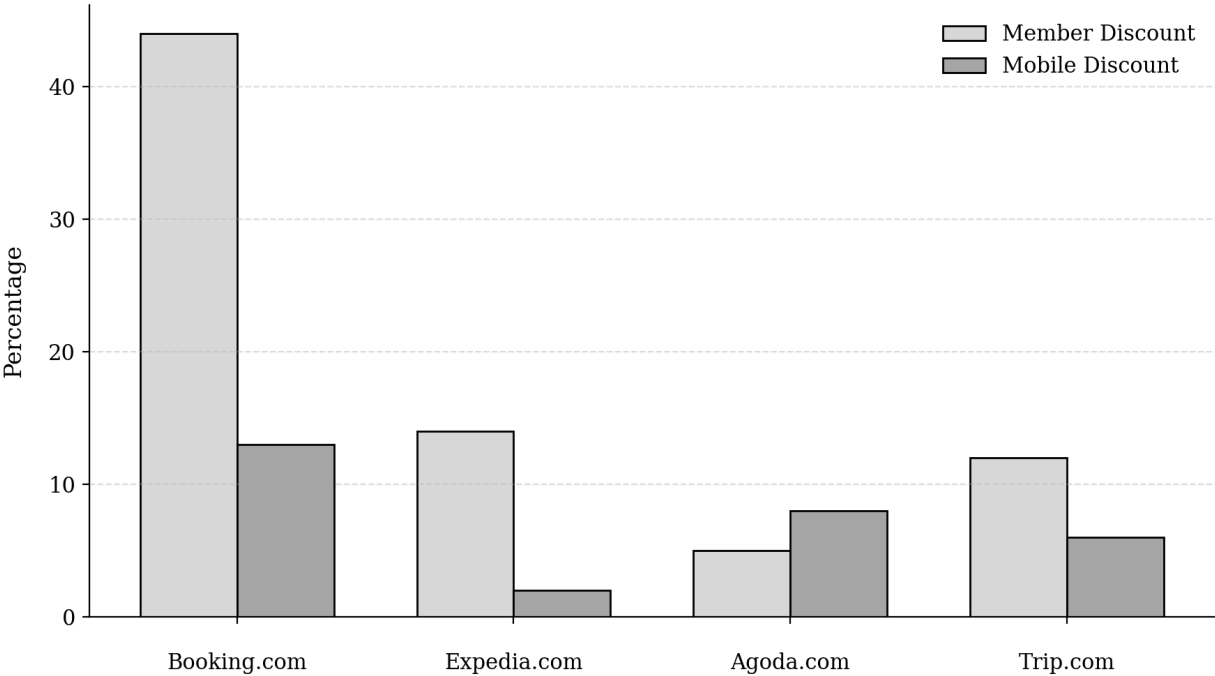
Market Share of Reviews by City



PART 3: PROMOTIONAL STRATEGIES (NEAR-DATE ANALYSIS)

To understand how hotels use discounts to fill rooms, we analyzed active promotions for November 2025 (for 14 days later). We found that hotels treat each OTA very differently.

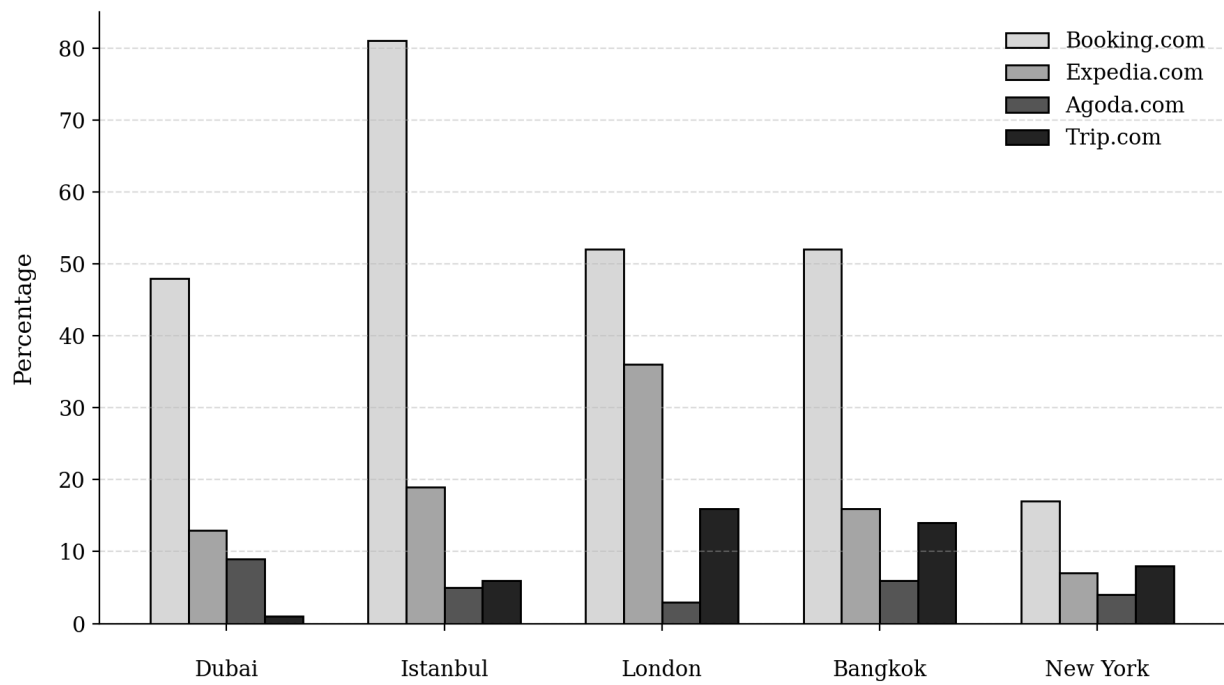
Global Overview: Promotional Strategies



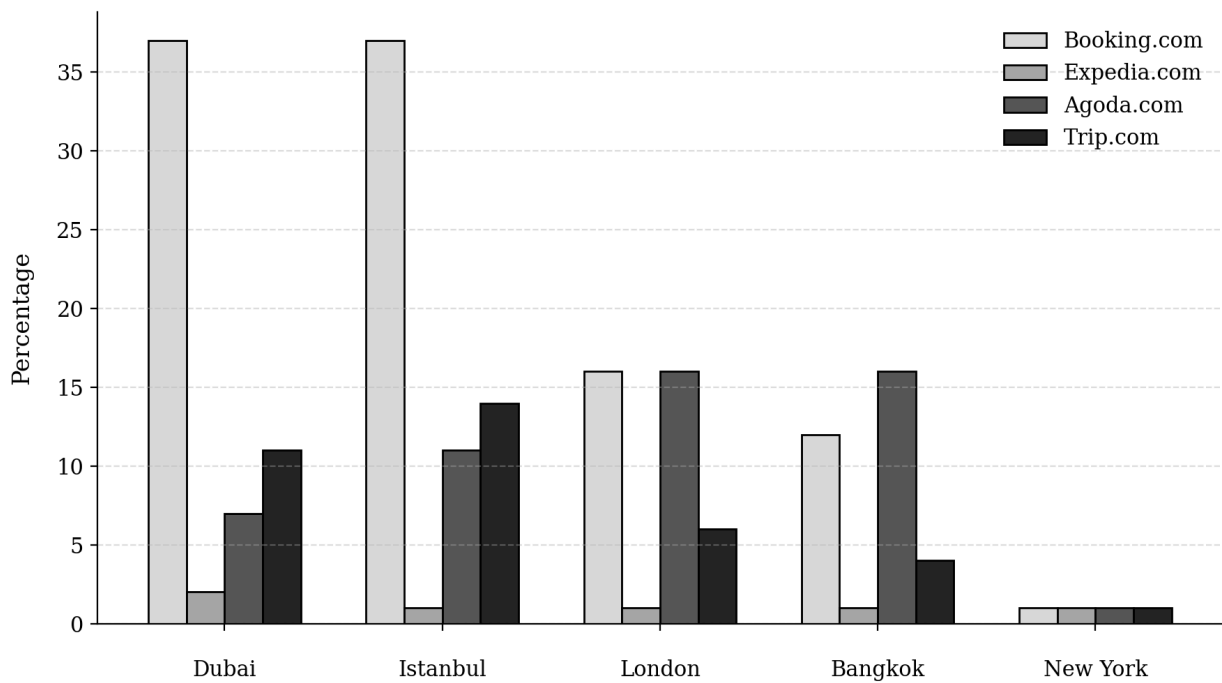
PART 4: CITY SPECIFIC ANALYSIS

This section demonstrates the percentage of hotels in each city using "Member Only & Mobile Only" rates to drive customer loyalty and retention. Tables analyzed include Membership Discount Penetration by City and Mobile Only Discount Penetration by City across Dubai, Istanbul, London, Bangkok, and New York.

Membership Discount Penetration by City



Mobile Only Discount Penetration by City



DISCLAIMER & LEGAL NOTICE

All data in this report is derived from publicly accessible website information that was manually collected and aggregated by city and hotel segment. No commercial APIs, unauthorized access methods, or platform content extraction techniques were used.

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