

Major Earnings, Regulatory Pressure and a Surprise Acquisition Shape a Full Week in Online Travel

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Good Sunday afternoon from Seattle and happy Mother's Day to all our mothers . . . Our weekly Online Travel Update for the week ending Friday, May 8, 2026, is below. It was another busy week in online travel as both Expedia and Airbnb released their quarterly earnings (transcripts from both earnings release calls are linked below). I've also included a few legal updates featuring everyone's favorite - influencers -, Trivago's anti-trust claims against Google and Google's latest attempt at DMA compliance. Enjoy.

UK Authority Raises Concerns Over Influencer Posts. As influencers' influence over important social media channels continues to grow, the UK's advertising authority, Advertising Standards Authority (ASA), has issued a report detailing influencers' failure to properly disclose their posts as travel ads. In its review of over 500 social media posts (Instagram and Tik Tok), the ASA found that only 20% of the posts were properly disclosed, 11% were disclosed, but inadequately, and 69% contained no disclosures. According to the report, ASA plans to contact both travel suppliers and influencers over the problematic posts. An important reminder for our US and UK readers, travel suppliers in the US and UK can be held responsible for influencers' failure to properly disclose, so due diligence and oversight is critical.

Expedia Posts Strong 1Q26 Financial Results. Again, we're not going to dive into the financial results of Expedia's first quarter - there are many (far more qualified) resources to provide those details. Highlights for me from this past quarter's earnings release include the following:

- According to Expedia CEO, Ariane Gorin, the use of AI is benefiting Expedia many ways including higher conversions on VRBO via servicing agents and AI filters, faster onboarding of new properties, increasing numbers (30%) of service interactions powered by AI, improved marketing value and increased traffic volumes and acquisition. Answer engine optimization (e.g., ChatGPT ads) is now Expedia's "fastest growing channel."
- B2B continues to be a primary growth engine (see recent Uber announcement). Revenue in the first quarter grew 25% (to \$1.2 billion). Ariane now views Expedia's B2B business as an entirely separate line of business.

Meet Lola, Booking Holdings' "East Coast" Startup. *Skift* this past week revealed further details on one of Booking Holdings' startups (the "East Coast" startup), Lola. The "stealth" project features two online travel industry veterans, Kayak's Steve Hafner and Paul English. A new splash [page](#) for the startup appeared this

past week featuring brand banners for Booking.com, Kayak, OpenTable, FareHarbor and SeatGeek. Our readers might remember an earlier version of "Lola," which was launched in 2015 and featured a combination of digital online travel services and human agents. That effort was ultimately purchased by Capital One in 2021.

William Shatner is Back. Sorry, I cannot pass up a story featuring the original online price negotiator. He's now 95.

Trivago Brings Anti-Trust Claims Against Google. Trivago this past week filed suit against Google in a German Court alleging that the search giant favored its own hotel metasearch products over those of its competitors (which is prohibited under the DMA), like Trivago. The suit covers the period of January 2024 - December 2025 and seeks damages as well as the disclosure of traffic and revenue data.

Google Testing New Search Box in Latest Attempt to Comply with DMA. Google's ongoing efforts to satisfy its DMA obligations and major advertisers continues. Google's latest effort includes a box at the top of search results that features a single comparison website (e.g., Booking.com). The featured comparison website will be determined based on relevance to the specific search query, not an auction. Suppliers will be given a separate second box under the initial comparison website's box. With the success of Google AI mode, one has to ask how much longer the current iteration of the DMA and the EU's enforcement efforts will even be relevant.

Takeaways from Recent AmexGBT Announcement. Much has been written this past week over Long Lake Management's announced private takeover of the corporate travel platform, Amex GBT. While the takeover represents the latest chapter in the platform's long and storied history, it also sends a strong message about corporate travel and the belief, at least by certain investors, that corporate travel is a prime candidate for AI automation. Long Lake Management was formed in 2023 and is backed by many of the same investors behind several prominent AI companies, including ChatGPT. Long Lake Management's previous endeavors have focused on traditional service businesses that it believed could benefit from the introduction and use of AI. Its latest efforts in the homeowner association management business produced 25-30 percent productivity gains. Now Long Lake Management is focused on another service business, corporate travel. What this means for Amex GBT and its 22,000 employees and corporate/managed travel generally will be watched by many in the months and years to come. Stay tuned.

Have a great week everyone.

[Expedia Group, Inc. Q1 2026 Earnings Call](#)

May 7, 2026 via Expedia Group

We had a strong first quarter, underpinned by solid execution as well as progress on our strategic priorities and operational leverage that we've been building over many quarters.

[Airbnb, Inc. Q1 2026 Earnings Call](#)

May 7, 2026 via Seeking Alpha

Airbnb had a strong start to 2026. Last quarter, we talked about the path we've been onto rebuild our foundation, innovate faster and accelerate growth. In Q1, that work continued to pay off.

Most Travel Influencers Failing to Disclose Paid-for Posts

May 7, 2026 via Decision Marketing

The vast majority of travel influencers on social media are failing to disclose when their posts are paid for ads, according to a new investigation, which raises further concerns about how influencers are policed.

Brian Chesky Says Airbnb Won't Mix Homes and Hotels - That's 'Pre-AI' Design

May 7, 2026 via Skift

Airbnb's Chesky is nothing if not ambitious. Given that people's preferences can change at any moment, the ability to serve customers with only a hotel or home, depending what they need in that instant, seems a long way off, even with agentic AI.

Expedia Group Hits Record Q1 Profitability Amid AI Overhaul

May 7, 2026 via PhocusWire

On the back of an artificial intelligence (AI)-focused technological overhaul, Expedia Group reported its highest Q1 profitability in company history on Thursday.

Kayak Founders Team Up for Booking Holdings AI Startup

May 6, 2026 via Skift

In addition to other Booking Holdings' brands, Seat Geek is listed as a partner. Users would presumably be able to use conversational AI to get "insider access" and discounted rates from Booking brands and partners.

Wyndham Launches Native ChatGPT App for Hotel Booking

May 6, 2026 via Hotel Management News

Wyndham Hotels & Resorts has launched a native app within OpenAI's ChatGPT, marking the first time a major U.S. economy and midscale hotel franchisor has introduced a dedicated hotel discovery and booking experience inside the generative AI platform.

Trivago Files Antitrust Suit Against Google

May 5, 2026 via Market Watch

Trivago N.V. has filed an antitrust suit against Google in a German court, accusing the search engine giant of systematically favoring its own hotel metasearch service to the detriment of competing services including Trivago.

William Shatner Is Taking TikTok Applications for New Priceline Negotiator Campaign

May 5, 2026 via Skift

Priceline has been a savvy marketer over the years, and this ad campaign tease hits the right notes at a time when affordability concerns are a major trend.

New Ways to Buy ChatGPT Ads

May 5, 2026 via OpenAI

We're taking the next step in our ChatGPT ads pilot by making it easier for businesses to participate while keeping the experience useful, private, and clearly separate from ChatGPT's answers.

Dara Khosrowshahi on Replacing Uber Drivers - and Himself - with AI

May 4, 2026 via The Verge

The big news this year is that Dara is really starting to think about Uber as a much larger platform for travel - starting with the ability to book hotels in the Uber app, thanks to a partnership with Expedia.

Amex GBT's 12-Year Ownership Saga - Who Won and Lost

May 4, 2026 via Skift

A \$6.3 billion take-private closes the books on one of the most convoluted cap tables in travel. The scorecard is not what you'd expect.

Google is Testing a New DMA Compliance Solution for Flights, Hotel Search

May 4, 2026 via MLex

Google is revamping the top of its search results in response to flight and hotel-booking queries in its latest bid to comply with an EU law regulating digital "gatekeepers," MLex has learned.

How TikTok and AI Are Rewriting Booking Decisions in Asia

April 29, 2026 via Skift

The customer is technically in charge of booking decisions, but social media and AI systems are increasingly making the decisions for them.

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