

# Online Travel Update: Expedia's New Partnerships, AH&LA's Support for Resort Fee Legislation, and Strong Q2 Results for Industry Giants

08.08.23 01.07.26

After several slow weeks in the industry, this past week featured a number of important updates, including earnings releases and calls from Booking Holdings and Expedia Group.

Transcripts from the two companies' earnings calls are attached. Enjoy.

- **Expedia Scores a Win with Walmart + Travel.** While Expedia may have lost an important relationship with its recent termination of Hopper, Expedia was able to make up for some of that lost B2B traffic with a newly announced partnership with Walmart. According to the companies' announcement, Expedia will be providing the retailer with hotel, airline, rental car and activities inventories. Walmart members who use Walmart to book travel will receive Walmart cash (up to 5% for hotels) back. Users of Expedia's B2B platform (or any other similar B2B platform) should give some thought as to how changes like the recent Hopper termination and now Walmart addition might affect their traffic through the platform and their performance against any contracted performance metrics.
- **AH&LA Voices Support for Proposed Federal Resort Fee Legislation.** By now, most everyone is familiar with recent federal legislation proposed by U.S. Senators Klobuchar (D-Minn.) and Moran (R-Kan.). If you've not read the proposed legislation, [click here to view an early initial draft](#). To many pundits surprise (several suggested that hoteliers would never get behind the legislation), the American Hotel & Lodging Association has come out strongly in favor of the Act.
- **Expedia Group and Bookings Holdings Enjoy Strong Second Quarters.** Both Expedia Group and Booking Holdings reported strong second quarter results last week. Even with record levels of gross travel bookings in the second quarter, Booking Holdings expects that it may see even better results later this year (based on July hotel booking activity that represents a 20% YOY increase). Expedia also enjoyed a record breaking quarter (gross bookings and revenue), though revenues fell short of analysts' expectations. Earnings calls provided insight into a number of ongoing initiatives within both companies, including ongoing B2B efforts (Expedia), the launch of a single, unified loyalty program (Expedia), the

introduction and use of Artificial Intelligence (both) and the connected trip (Booking).

### **Trivago Gets Harsh Reminder of Google Ads' Power**

August 3, 2023 via Skift Travel News

Skift Take Today's edition of Skift's daily podcast looks closer at Trivago's ad choices, Sabre's tech chief exit, and Allegiant Air's successful strategy. Rashaad Jordan Share Skift Daily Briefing Podcast Listen to the day's top travel stories in under four minutes every weekday. Learn More Good morning from Skift. It's ...

### **Expedia Plays Long Game as it Awaits Fourth Quarter Finish to Vrbo Tech Shift**

August 3, 2023 via Skift

Expedia Group should have most of the pieces in place at the end of the year to complete key elements of its transition. Then we'll have to see how well it executes on these new planks in reality. Dennis Schaal Share Investors looking for short-term gains may be ...

### **Booking's Fogel sees signs of "record summer travel season"**

August 3, 2023 via Phocus Wire

Booking Holdings enjoyed record gross travel bookings in Q2, but CEO Glenn Fogel sees even better things coming based on July figures.

### **Expedia Group sees signs for optimism in record Q2 earnings**

August 3, 2023 via Phocus Wire

While revenues slowed and fell below analysts' estimates, CEO Peter Kern saw promise in Expedia Group's plans for the rest of the year.

### **Ryanair accuses OTAs of 'malpractice' and urges customers 'book direct'**

August 3, 2023 via Travel Weekly – News Air

Ryanair has hit out at online travel agents (OTAs), accusing them of "malpractices" and urging customers to book exclusively with the airline. The carrier claims passengers booked through OTAs were unable to access Ryanair's free, change-of-flight options during the wildfires on Rhodes last month because the OTAs withheld their booking ...

### **AHLA Statement in Support of the Hotel Fees Transparency Act**

July 31, 2023 via Hospitality Net – Latest Industry News

WASHINGTON - American Hotel & Lodging Association (AHLA) President & CEO Chip Rogers is speaking out today in support of the Hotel Fees Transparency Act, which was introduced in the U.S. Senate by Sens. Klobuchar (D-Minn.) and Moran (R-Kan.). The Hotel Fees Transparency Act is an important bill that will ...

### **Hotelbeds Touts New General Counsel's IPO Experience**

*July 31, 2023 via Skift*

Hotelbeds, which reportedly hired bankers a couple of months ago to ready an initial public offering, has appointed a new general counsel, and the hotel wholesaler touted her experience in compliance and taking companies public. Source: Hotelbeds Sagrario Fernández, who now leads Hotelbeds' legal and compliance teams, "brings a wealth ...

### **Google Hotels and Google Flights Stir Bipartisan Flack Over Business Practices**

*July 28, 2023 via Skift Travel News*

The legislation that Senators Elizabeth Warren and Lindsey Graham back will get picked apart by lobbyists. One element that airlines would loathe - it would bar companies from selling the same product at different prices...

### **Expedia in Deal to Power Walmart Travel**

*July 25, 2023 via Skift*

Skift Take Walmart is a giant retailer but it's possible Hopper was a more meaningful client for Expedia. At any rate, Walmart is potentially a significant win, and at least it isn't a competitor. Dennis Schaal Share  
When it comes to online travel agencies' business to business deals, you may ...

Posted in [Online Travel Update](#)

## Authored by

[Greg Duff](#)

[Principal|Seattle](#)

[206.816.1470](tel:206.816.1470) [greg.duff@foster.com](mailto:greg.duff@foster.com)