Duff on Hospitality Law

Online Travel Update: HotelPlanner Cancels Planned Merger; Booking.com Outsources Customer Service; Supply Remains a Challenge for Airbnb

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This week's Update features stories detailing recent fourth quarter earnings releases by TripAdvisor, Airbnb, Marriott and Sabre. Enjoy.

HotelPlanner Cancels Planned Merger

("HotelPlanner.com SPAC Merger Called Off," February 14, 2022 via Business Travel News)

It seems like only yesterday when many of our clients were left speculating as to what might come out of the newly announced merger and IPO of group booking platform, HotelPlanner, discount booking platform, Reservations.com and SPAC Astrea Acquisition Corp. There is no need for further speculation as the three companies announced last week that they have called off the planned merger. In their statement announcing the cancelation, the three companies offered no details as to the reasons behind the decision. One could speculate that HotelPlanner's and Reservation.com's differing reputations in the market might have played a role.

Booking.com Outsources Customer Service

("Booking.com ignites anger after customer service outsource move," February 14, 2022 via Phocus Wire)

According to internal announcements at Booking.com, Booking.com has elected to outsource approximately 2700 call center support positions to a third party, Majorel. Callous cost cutting measure or, as Booking.com claims, a move to leverage "industry-leading customer service expertise" for a rapidly evolving business model? What does this move mean for suppliers and customers of Booking.com? Only time will tell.

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Supply Remains a Challenge for Airbnb

("Airbnb Looks to Recruit More Hosts to Meet Demand After Record 2021," February 16, 2022 via Skift) (subscription may be required)

While many of Airbnb's fourth quarter key financial metrics (e.g., revenue and net profit) exceeded pre-pandemic 2019 levels, challenges growing Airbnb's rental inventory continue to plague the rental platform. Despite recent ad campaigns lauding its many hosts and improving the host onboarding process, inventory levels at Airbnb have remained largely stagnant at four million homes over the past several years. According to Airbnb, approximately 90 percent of its existing hosts are individuals, which will remain the primary area of focus for Airbnb for growing its inventory over the next year (and not through professional property managers or, notably, hotels).

Hopper Extends Sabre Strategic Partnership

("Hopper expands strategic technology partnership with Sabre," February 14, 2022 via Finanzen)

Another weekly Update and another Hopper story. Sabre and Hopper announced last week that they were renewing and expanding the parties' long-term strategic partnership. According to the announcement, Sabre will serve as Hopper's primary (not exclusive) GDS and technology partner.

Other news:

The Tripadvisor Earnings Call That Became a Sales Pitch for Viator

February 17, 2022 via Yahoo Finance – Top Stories

Tripadvisor's fourth quarter earnings call with financial analysts amounted to a sales pitch for its potential Viator initial public offering - or other options under discussion with third parties that Tripadvisor said are taking place in "parallel."

Marriott Direct Booking Share Up vs. OTA Channels

February 16, 2022 via Phocus Wire

Marriott International says it has grown its direct channels "more meaningfully" than the online travel agency channel.

Sabre Plots Recovery as Profits Lag

February 15, 2022 via Phocus Wire

Sabre says it expects adjusted EBITDA to exceed pre-pandemic levels only by 2025, as travel continues its slow recovery from the impact of the coronavirus.

Posted in Online Travel Update

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