Duff on Hospitality Law

OTA & Travel Distribution Update: Sudden resignations of Expedia Group CEO & CFO; Kayak's metasearch business model evolves with launch of Kayak Premium; Amazon slowly expands its travel products on its Indian travel platform

12.13.19

It should come as no surprise that stories detailing the unexpected resignations of Expedia's top two senior executives are featured prominently in this week's Update. Rather than just recirculating the usual industry reports, we thought we might offer a more localized (and detailed) view of the resignations. Oh yeah, we also decided to throw in a story about another Pacific Northwest company's expansion of its closely watched travel experiment. Enjoy.

Okerstrom and Pickerill Out

("Expedia's two top execs pushed out as chairman Diller asserts control," Seattle Times on Dec 5, 2019)

By all accounts we've seen, last week's resignations of Expedia Group CEO Mark Okerstrom and CFO Alan Pickerill came as a complete surprise. What led to the sudden departures? Expedia Group's dismal third quarter financial results? Differing perspectives on Expedia Group's go-forward strategies? I'm not sure we will ever know all of the reasons for the resignations. A copy of Expedia Group Chairman Barry Diller's text to Expedia Group employees immediately following the resignations is included in our Geekwire report. For now, Expedia Group will be led by Diller and Expedia Group Board Vice Chairman, Peter Kern. What this all means for Expedia Group's hotel supplier partners is unclear, though if asked to speculate (which is all anyone can do at this point), I'd offer that it might be rough going in the

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near term. While Cyril Ranque appears to still be President of Expedia Group's lodging partner services, it isn't clear whether Ranque or even his role within the Expedia Group organizational chart will remain. Even if Ranque retains his position long term, we have no idea what influence Diller's presence might have on Ranque and his approach to suppliers. We know firsthand that Okerstrom often got personally involved in the negotiation of key lodging partner agreements, and whether Diller is prepared to play a similar role (or even if not playing that role, how Diller might view Expedia Group's supplier partners and the more moderate "cooperative" approach to key supplier partner relationships exhibited under Okerstrom's leadership) is unknown. Buckle up everyone.

Kayak's Model Continues to Evolve

("Kayak's Search App Will Now Let Users Check in to Select Rentals and Hotels," Skift Travel News on Dec 5, 2019)

Does anyone's business model in metasearch remain static for more than six months? Perhaps recognizing the increasingly competitive travel search landscape (hello Google) for most metasearch platforms, this past week, Kayak announced Kayak Premium, a new service that will allow users of its mobile application to check in and check out of select U.S. short-term rental and boutique hotel properties. Kayak's first partner for this new premium service will be San Francisco-based company Lyric, which manages approximately 500 short-term rental units (primarily located in multi-family apartment buildings) in a dozen U.S. cities.

Amazon Incrementally (and Quietly) Expands Its Indian Travel Experiment

("Amazon Adds Bus Tickets in India in Pursuit of Superapp Strategy," Skift Travel News on Dec 4, 2019)

With the travel industry's attention focused squarely on Expedia this past week, Amazon used the opportunity to quietly roll out additional travel products on its Indian travel platform. Coincidence? Intentional? Readers of our Update will recall that in May of this year, Amazon quietly rolled out domestic airline tickets to its users in India. This past week, Amazon added domestic bus tickets through a partnership (similar to its centralized-supplier approach with airline tickets) with MakeMyTrip-owned Redbus. According to local reports, Amazon's expansion of its Indian travel offerings isn't completed as the online giant is expected to soon roll out hotels and train tickets as well.

Other news:

Alternatives to Oyo Surface for Independent Budget Hotels in Asia

Skift Travel News on Dec 6, 2019

New players are surfacing in Asia, and they're attempting to offer better solutions to small independent hotels than Oyo, Expedia, and the software-as-a-service (SaaS) types.

Expedia Fallout: Life After Mark Okerstrom

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Phocus Wire on Dec 5, 2019
Industry analysts react to the sudden departures of Expedia Group CEO Mark Okerstrom and CFO Alan Pickerill.

Google's Playbook to Become a Super App in Travel
Phocus Wire on Dec 2, 2019
Combine a global army of local experts with Google's unlimited capacity to track movements of all its map users and you get the picture: a rapidly expanding database of the nearly entire human knowledge of any place on earth.

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Authored by

Greg Duff

Principal|Seattle

206.816.1470 greg.duff@foster.com

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