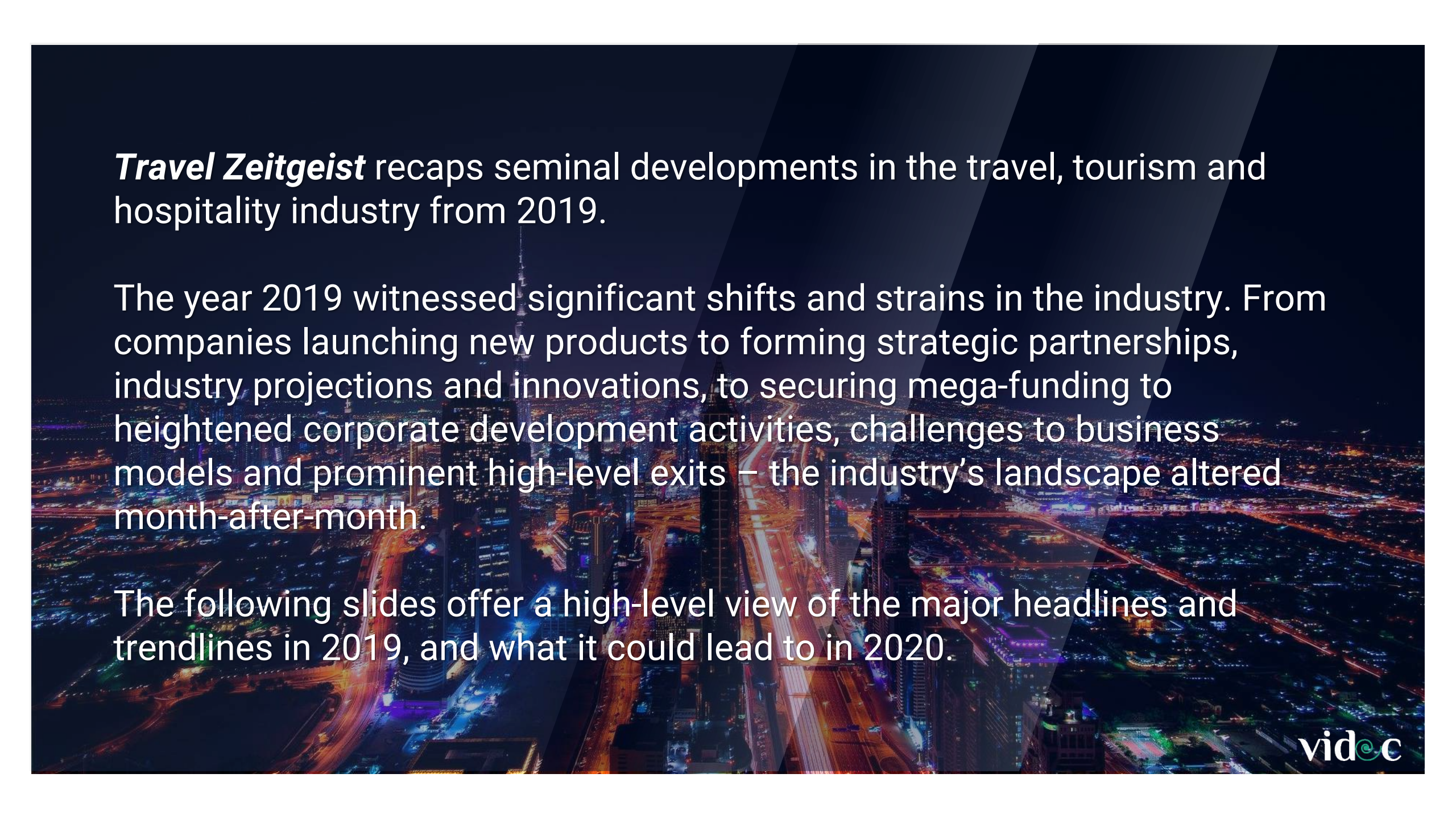


A man with short grey hair, wearing sunglasses and a blue backpack, stands on a rocky mountain ridge, looking out over a vast landscape. In the distance, a turquoise lake is nestled between dark, forested mountains. The sky is filled with large, white and grey clouds. The image is divided into three vertical sections by diagonal lines, each showing a different view of the same scene.

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TRAVEL ZEITGEIST 2019



Travel Zeitgeist recaps seminal developments in the travel, tourism and hospitality industry from 2019.

The year 2019 witnessed significant shifts and strains in the industry. From companies launching new products to forming strategic partnerships, industry projections and innovations, to securing mega-funding to heightened corporate development activities, challenges to business models and prominent high-level exits – the industry's landscape altered month-after-month.

The following slides offer a high-level view of the major headlines and trendlines in 2019, and what it could lead to in 2020.



LOOKING EAST

Qatar Airways buys 5% in China Southern Airlines

Akbar Al Baker, Group CEO, Qatar Airways



BEYOND AIR

SiteMinder to Power Ryanair's Hotel Content Distribution

Sankar Narayan, CEO, SiteMinder

SiteMinder Total Funding to Date*: \$35.1M

OYO Rising

Claims to be the World's Third Largest Hotel Chain

Ritesh Agarwal, Founder & CEO, OYO Rooms
OYO Total Funding to Date: \$3.2B*



Qantas Launches NDC Booking Platform for Travel Agents

Alan Joyce, CEO, Qantas Airlines
Qantas Market Cap: A\$11.02B (As of December 24, 2019)





Autonomous Aircraft Market Worth \$23.7B by 2030: MarketsandMarkets

Projected CAGR of 17.06% from \$3.6B in 2018 to \$23.7B by 2030.



Boeing 737 Max Grounded

Boeing Market Cap: \$190B (As of December 24, 2019)



MARCH

Uber Acquires UAE's Careem

L-R: Mudassir Sheikha, Co-Founder & CEO of Careem and
Dara Khosrowshahi, CEO, Uber

Uber Market Cap: \$52B (As of December 24, 2019)



TAXI HAILING ON STEROIDS

Grab raises \$1.5B

Grab Total Funding to Date*: \$9.1B



UBER
LISTED
NYSE

Uber

UBER
LISTED
NYSE

NEW YORK STOCK EXCHANGE

Uber Lists on NYSE

Uber Market Cap: \$52B (As of December 24, 2019)



Alibaba's FlyZoo Showcases the Future of AI-Based Hotels

Alibaba Market Cap: \$577B (As of December 24, 2019)



APRIL



SoftBank Vision Fund Taps GetYourGuide & Klook

L-R (Top): Fritz Demopoulos, Tao Tao, Alex Finkelstein, Johannes Reck, Kees Koolen and Philipp Freise.

GetYourGuide Total Funding to Date: \$654.5M*

L-R (Bottom): Eric Gnock Fah, Ethan Lin, Bernie Xiong

Klook Total Funding to Date: \$521.5M*

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amazon pay



AMAZON ENTERS TRAVEL
Launches Flight Bookings
in India

Amazon Market Cap: \$889B (As of December 24, 2019)

MAY

Tencent 腾讯



马蜂窝

Tencent Pumps \$250M in
Chinese OTA Mafengwo

Mafengwo Total Funding to Date: \$503M*

Tencent Market Cap: \$463B (As of December 24, 2019)

JUNE



FLIGHT SHAMING, TRADE WARS AND MORE...

IATA Downgrades Airline Profits in 2019



CORPORATE TRAVEL IN THE FAST LANE

TripActions Raises \$250M At \$4B Valuation

L-R: Ariel Cohen, CEO & Co-Founder,
Ilan Twig, CTO & Co-Founder, TripActions
TripActions Total Funding to Date: \$481.5M*



Sonder Raises \$225M; Plots Global Expansion

Sonder Total Funding to Date*: \$359.6M



Ebix Pursues Acquisition of Indian OTA Yatra for \$337.8M

Ebix Market Cap: \$1B (As of December 24, 2019)



FlixBus Raises \$561M in Series F Round

FlixBus Total Funding to Date: \$561M+*

AUGUST



Cendyn Acquires the Rainmaker Group

TIMESHARE OVERHAUL
RCI Bags Alliance Reservations
Network for \$92M

Trip.com (Ctrip) Acquires 42.5% Stake in MakeMyTrip

L-R: Rajesh Magow, Co-Founder & CEO - India,
Deep Kalra, Co-Founder and Group CEO, MakeMyTrip
MakeMyTrip Market Cap: \$2.5B (As of December 24, 2019)

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Airbnb Quarterly Revenue Tops \$1B

Brian Chesky, CEO, Airbnb
Airbnb Total Funding to Date: \$4.4B*



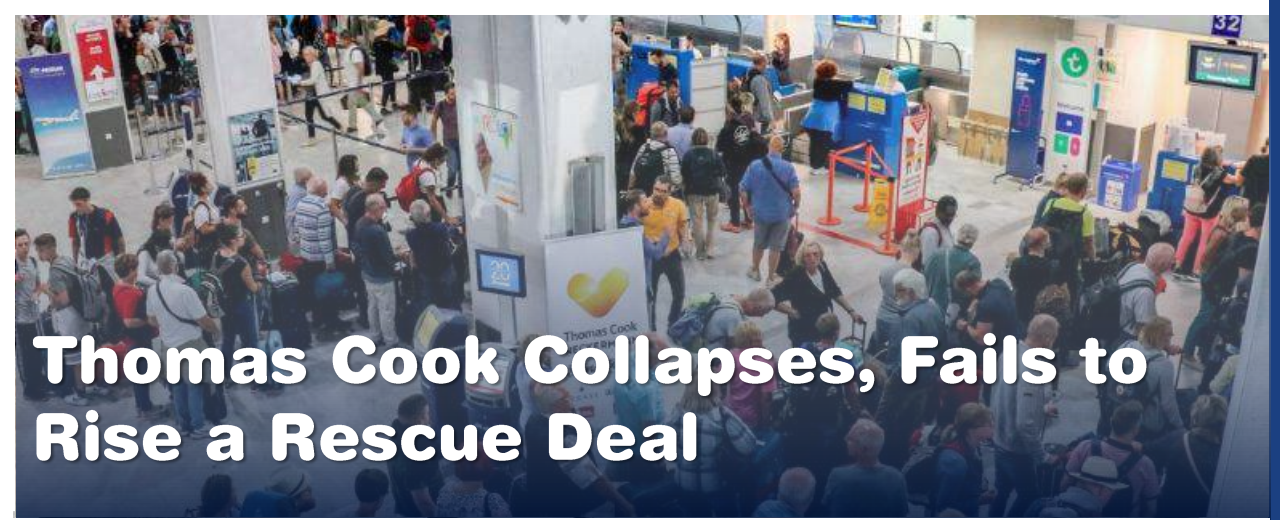
**Prince Harry-Travel Companies
Come Together for Sustainable
Travel Effort via Travalyst**

Prince Harry, Duke of Sussex



SEPTEMBER

**Marriott Hands Over Wholesale
Distribution to Expedia Partner Solutions**



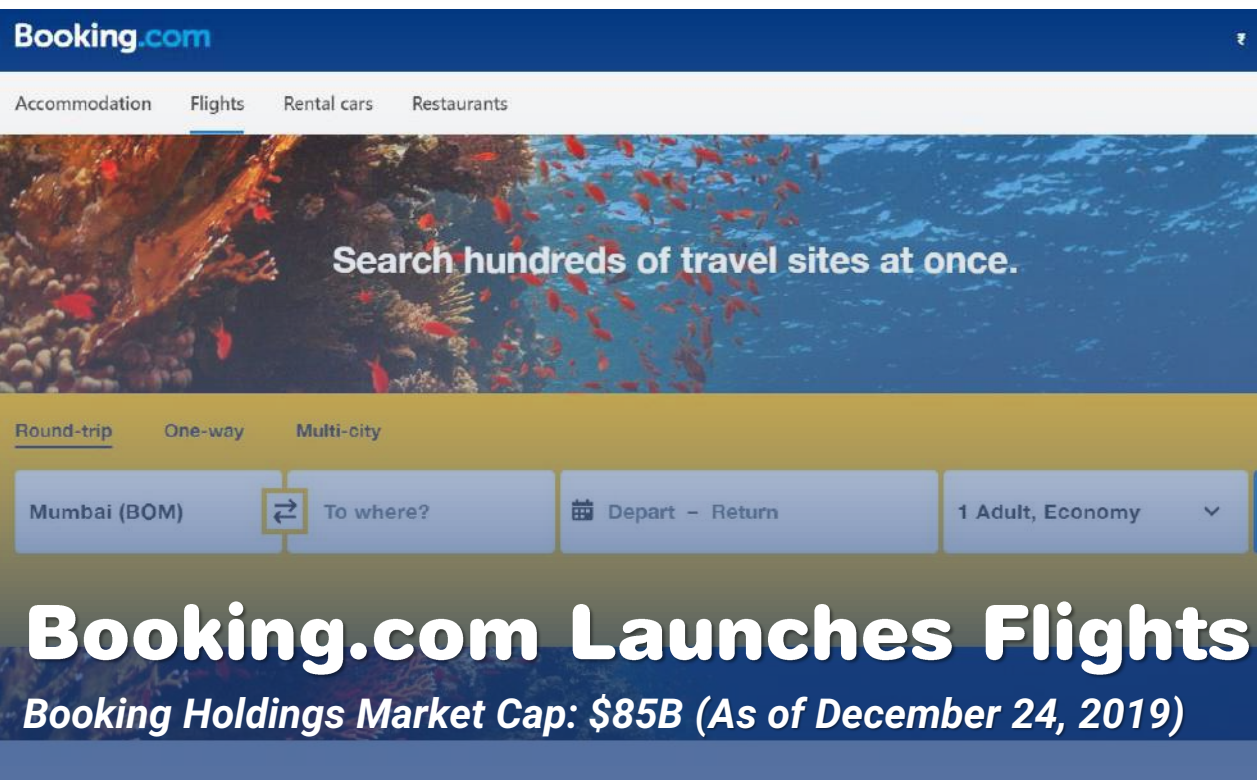
**Thomas Cook Collapses, Fails to
Raise a Rescue Deal**



**HRS Acquires Conichi to Build its
Payment Division**

L-R: Max Waldmann, Tobias Ragge, Tina Westermann, Frederic Haitz
Conichi Total Funding to Date: \$7.9M*





The image shows the Booking.com website interface. At the top, the Booking.com logo is on the left, and navigation links for Accommodation, Flights, Rental cars, and Restaurants are in the center. Below the navigation bar is a large banner with an underwater scene of coral and red fish, with the text "Search hundreds of travel sites at once." Below the banner is a search bar with tabs for Round-trip, One-way, and Multi-city. The search bar contains the text "Mumbai (BOM)" in the origin field, "To where?" in the destination field, "Depart - Return" in the date field, and "1 Adult, Economy" in the passenger field. Below the search bar, the text "Booking.com Launches Flights" is displayed in large white font, followed by "Booking Holdings Market Cap: \$85B (As of December 24, 2019)" in smaller white font.

Booking.com

Accommodation Flights Rental cars Restaurants

Search hundreds of travel sites at once.

Round-trip One-way Multi-city

Mumbai (BOM) To where? Depart - Return 1 Adult, Economy

Booking.com Launches Flights

Booking Holdings Market Cap: \$85B (As of December 24, 2019)



The image features a portrait of Eric Breon, Founder and CEO of Vacasa, against a blue background. The Vacasa logo is in the top left corner. In the top right corner, the word "OCTOBER" is written in white on a dark blue circular background. Below the portrait, the text "Vacasa Closes Series C \$319M Funding" is displayed in large white font, followed by "Eric Breon, Founder and CEO, Vacasa" and "Vacasa Total Funding to Date*: \$526.5M" in smaller white font.

vacasa

OCTOBER

Vacasa Closes Series C \$319M Funding

Eric Breon, Founder and CEO, Vacasa

Vacasa Total Funding to Date*: \$526.5M



The image shows a group of protesters in Hong Kong. They are holding signs, one of which reads "TOURIST WARNING WHILE THE HONG KONG POLICE ARE SHOOTING AT PEACEFUL PROTESTORS ON HONG KONG ISLAND THE GOVERNMENT EMPLOYS THUGS TO BEAT PROTESTORS IN NEW TERRITORIES". Another sign says "FREE HONG KONG DEMOCRACY". The protesters are wearing face masks. Below the image, the text "Hong Kong Arrivals Plunge 43.7% YoY to 3.3M" is displayed in large white font.

Hong Kong Arrivals Plunge 43.7% YoY to 3.3M

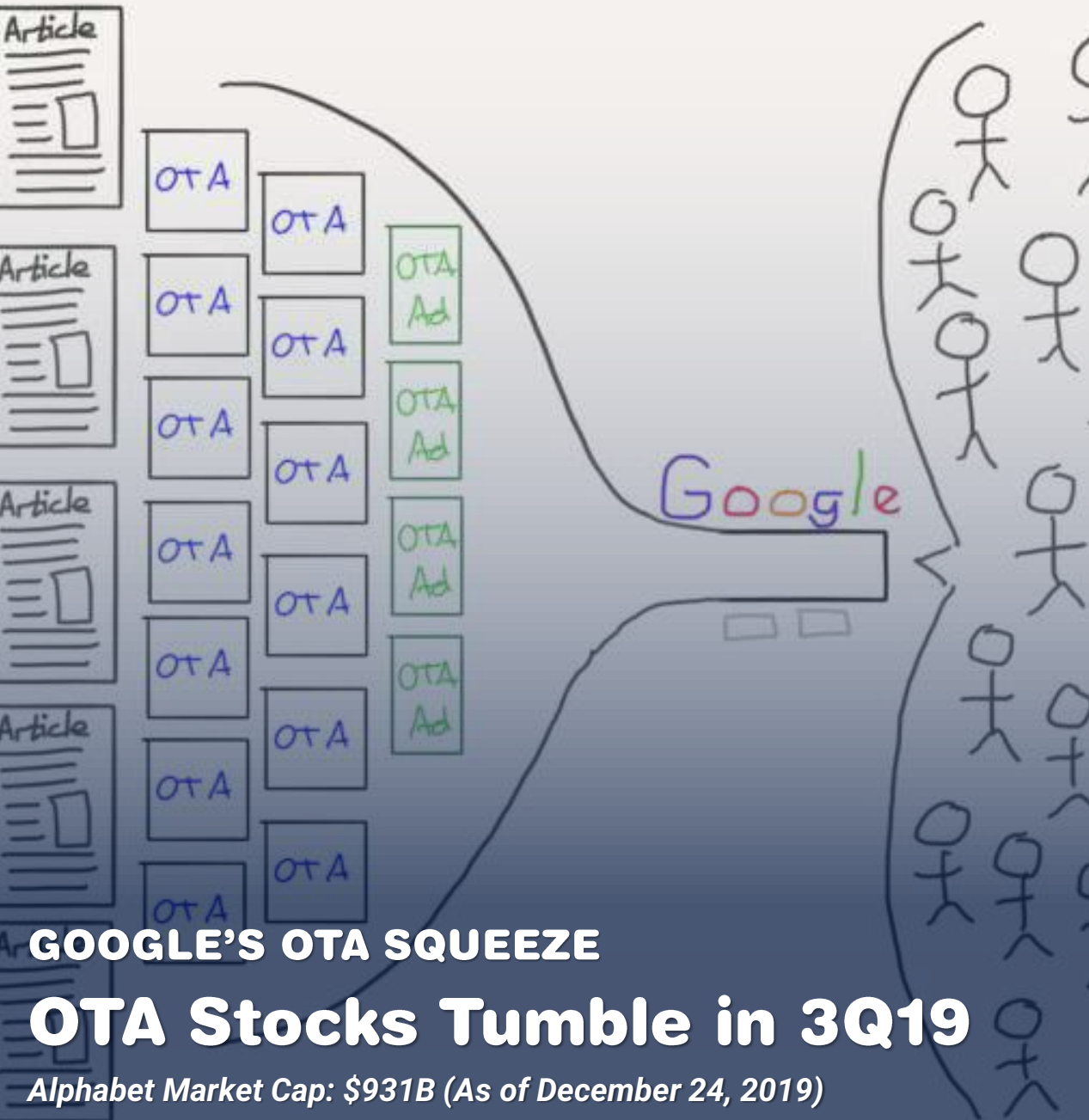


The image features a man in a suit and glasses, holding a document, standing in front of a large screen displaying a grid of data. Below the image, the text "Sabre Acquires Radixx in \$110M Deal" is displayed in large white font, followed by "Sabre Market Cap: \$6.2B (As of December 24, 2019)" in smaller white font. The Vidoc logo is in the bottom right corner.

Sabre Acquires Radixx in \$110M Deal

Sabre Market Cap: \$6.2B (As of December 24, 2019)

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GOOGLE'S OTA SQUEEZE

OTA Stocks Tumble in 3Q19

Alphabet Market Cap: \$931B (As of December 24, 2019)



NOVEMBER

TripAdvisor and Trip.com Group Announce Strategic Partnership

Trip.com Group Market Cap: \$20B

TripAdvisor Market Cap: \$4.2B

(As of December 24, 2019)



ARC-Traxo Join Hands

Traxo Total Funding to Date*: \$24.3M



Expedia CEO, CFO Resign

Mark Okerstrom, Former CEO and President, Expedia Group
Expedia Group Market Cap: \$16B (As of December 24, 2019)



FLYGSKAM IN THE SPOTLIGHT

Greta Thunberg, 16, is the youngest TIME Person of the Year

Greta Tintin Eleonora Ernman Thunberg, a Swedish environmental activist



Boeing CEO Fired

Dennis Muilenburg, Former CEO, The Boeing Company
Boeing Market Cap: \$190B (As of December 24, 2019)

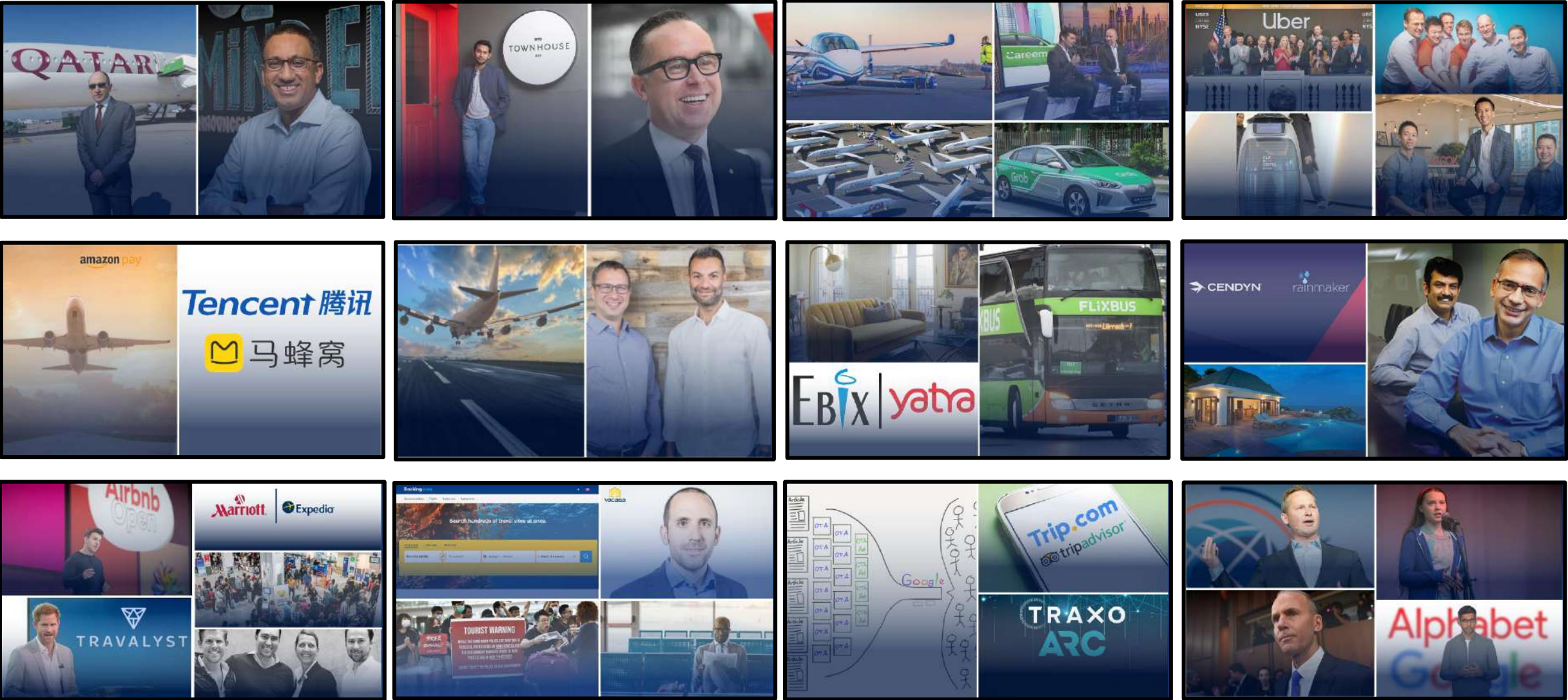


Sundar Pichai Elevated as CEO, Alphabet

Pichai Sundararajan, CEO, Alphabet Inc. and Google
Alphabet Market Cap: \$931B (As of December 24, 2019)

TRAVEL ZEITGEIST 2019

RECAP



APPENDIX

Hotelmarketing.com

[Cendyn Acquires the Rainmaker Group](#)
[Airbnb Quarterly Revenue Tops \\$1B](#)
[Marriott Hands Over Wholesale Distribution to Expedia Partner Solutions](#)
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[Google's OTA Squeeze: OTA Stocks Tumble in 3Q19](#)

PhocusWire

[Qantas Launches NDC Booking Platform for Travel Agents](#)
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Travel Daily Media

[Autonomous Aircraft Market worth \\$23.7B by 2030: MarketsandMarkets](#)
[Taxi Hailing on Steroids: Grab raises \\$ 1.5 Billion](#)
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[Trip.com \(Ctrip\) Acquires 42.5% Stake in MakeMyTrip](#)

Breaking Travel News

[Beyond Air – Siteminder to Power Ryanair's Hotel Content Distribution](#)
[Uber Acquires UAE'S Careem](#)
[Sabre Acquires Radixx in \\$110 Deal](#)

Skift

[Sonder Raises \\$225M; Plots Global Expansion](#)
[FlixBus Raises \\$561M](#)

The BBC

[Thomas Cook Collapses, Fails to Rise a Rescue Deal](#)
[Greta Thunberg, 16, is the youngest TIME Person of the Year](#)

TechCrunch

[Alibaba's FlyZoo Showcases the Future of AI-Based Hotels](#)
[SoftBank Vision Fund Taps GetYourGuide & Klook](#)

TTG Asia

[Looking East – Qatar Airways buys 5% in China Southern Airlines](#)

The New York Times

[Prince Harry-Travel Companies Come Together for Travelyst](#)

Public Broadcasting Service (PBS)

[Boeing 737 Max Grounded](#)

TOPHOTELNEWS

[Alibaba's FlyZoo Showcases the Future of AI-Based Hotels](#)

The Verge

[Uber Lists on NYSE. Uber Market Cap: \\$51.26 Billion \(December 16, 2019\)](#)

Company Statements and Press Releases

[Ebix Pursues acquisition of Indian OTA Yatra for \\$337.8M](#)
[Amazon Enters Travel: Launches Flight Bookings in India](#)
[Tencent Pumps \\$250M in Chinese OTA Mafengwo](#)
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[OYO Rising: Claims to be the World's Third Largest Hotel Chain](#)

Funding and Market Cap Sources:

Crunchbase and Yahoo! Finance

Image Sources:

Nikkei Asian Review, Financial Express, CNBC, The Verge, Ant Hill, Exchange4Media, MENAbytes, Techcrunch, Skift, Klook, Bloomberg, Business Traveller, Medium, New Mobility, Cision PR Newswire, Business Wire, My Modern Met, Stratechery, The Next Web, Metro News



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TRAVEL ZEITGEIST 2019

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