

AIRFARE INDUSTRY

TRAVEL APPS

AND THEIR

MARKETING

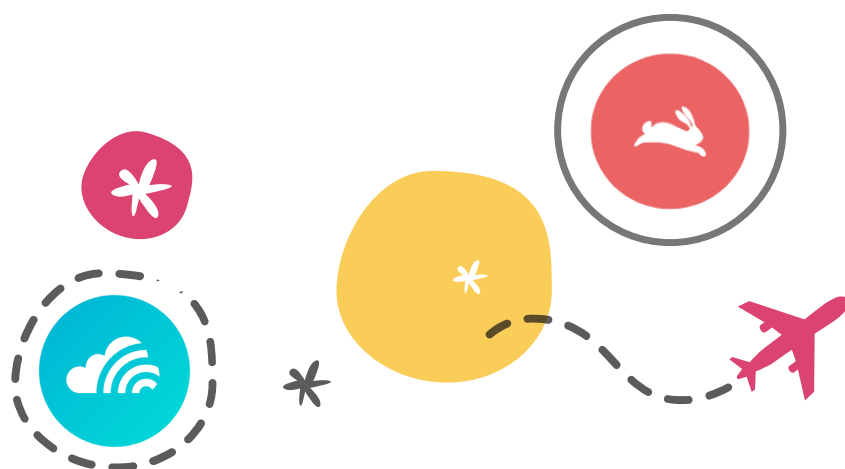


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EXECUTIVE SUMMARY

Summer is here, and it is the season to travel. At App Growth Network, we have decided to compile a research portfolio on the trends and advancements the tourism industry has made in anticipation for the popular summer travel. The tourism industry is a multi-billion industry with hundreds and thousands of competitors across the world. It is a profitable industry if companies can find their own niche. However, it also has a high turnover rate.

In this report, we will be focusing on the airfare industry in particular. We have chosen three companies to analyze in depth. These three companies, in our opinion, have disrupted the travel industry greatly. The first is the oldest online travel agency, Expedia. The second is a newcomer that is only available on mobile applications, Hopper. And the last, the middle ground between the two, Skyscanner. For each company, we will be analyzing their ASO and marketing strategies, as well as the unique tactics each company uses to stay competitive in such a highly saturated environment.

Finally, we will conclude with some key takeaways we discovered while researching this report. We will share with you what we found to be the common trend for all three companies in their marketing departments, as well as what we think the future of the industry will hold.



TRAVEL INDUSTRY DATA

Background

In 2017, the travel industry was calculated to be worth approximately 5.92 trillion USD annually (Travelweek Group, 2018). Similarly, the airline industry's revenue was valued at 222 billion USD by Deloitte in 2018 (Langford, Weissenberg, & Gasdia, 2019). As people's standard of living increases, more people book trips away for holidays and vacations. According to Squaresmouth, travel budgets have increased every year.

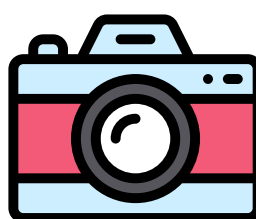
- The average cost of an international trip for American travel now sits at approximately \$6,000 (Kutschera, 2019).
- The percentage of mobile bookings increased between 2017 and 2018, increased from 51.5% to 56.7% (Kutschera, 2019).
- Generation Z takes on average **29** days of vacation
- Millennials take on average **35** days of vacation
- Generation X takes on average **26** days of vacation
- Baby Boomers take on average **27** days of vacation (Expedia, 2017)

Approximate Total Travel Spending in 2018



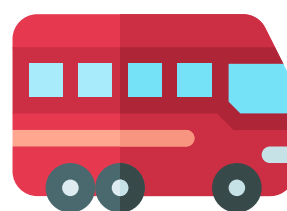
Millennials

\$6.8B



Generation X

\$5.4 B



Baby Boomers

\$6.3B

(Gelfeld, 2017)

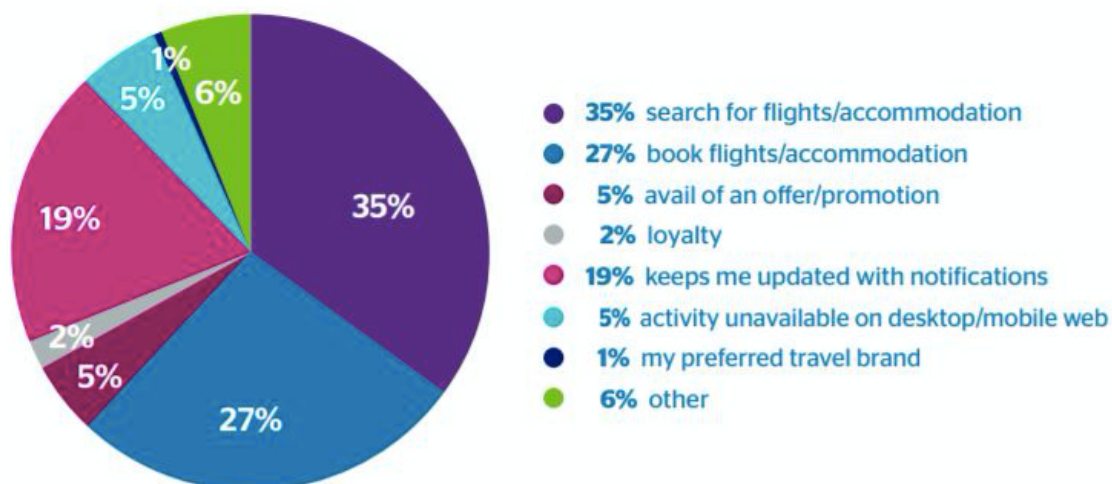
TRAVEL INDUSTRY DATA

Mobile Trends

In 2019, our phones are so much more than just phones. Not only do we communicate with them, but they are now also our camera, wallet, entertainment source, and map. Virtually anything and everything has an application that we can download in one click. There are now thousands of travel apps and hundreds of options for booking a flight. With these advancements in technology, it has become more convenient and easier to reach out to potential and current customers. At the same time, the expansion of the travel industry also attracts more competition in the marketplace.

- PhocusWire claims that almost 2/3 of travel app users uninstall the app within 30 days of install (Fox, 2018). That being said, travel apps still reach more than 137 million users per month, with the average user spending at least two hours on the app per month (Foxe, 2016).
- The traditional route of marketing is no longer as effective. Companies must invest in digital marketing like ASO, SaaS, and CRM if they want to succeed in such a highly saturated market (AppsFlyer, 2018).

Which of the following best describes your reasons for downloading a travel app to your smartphone?

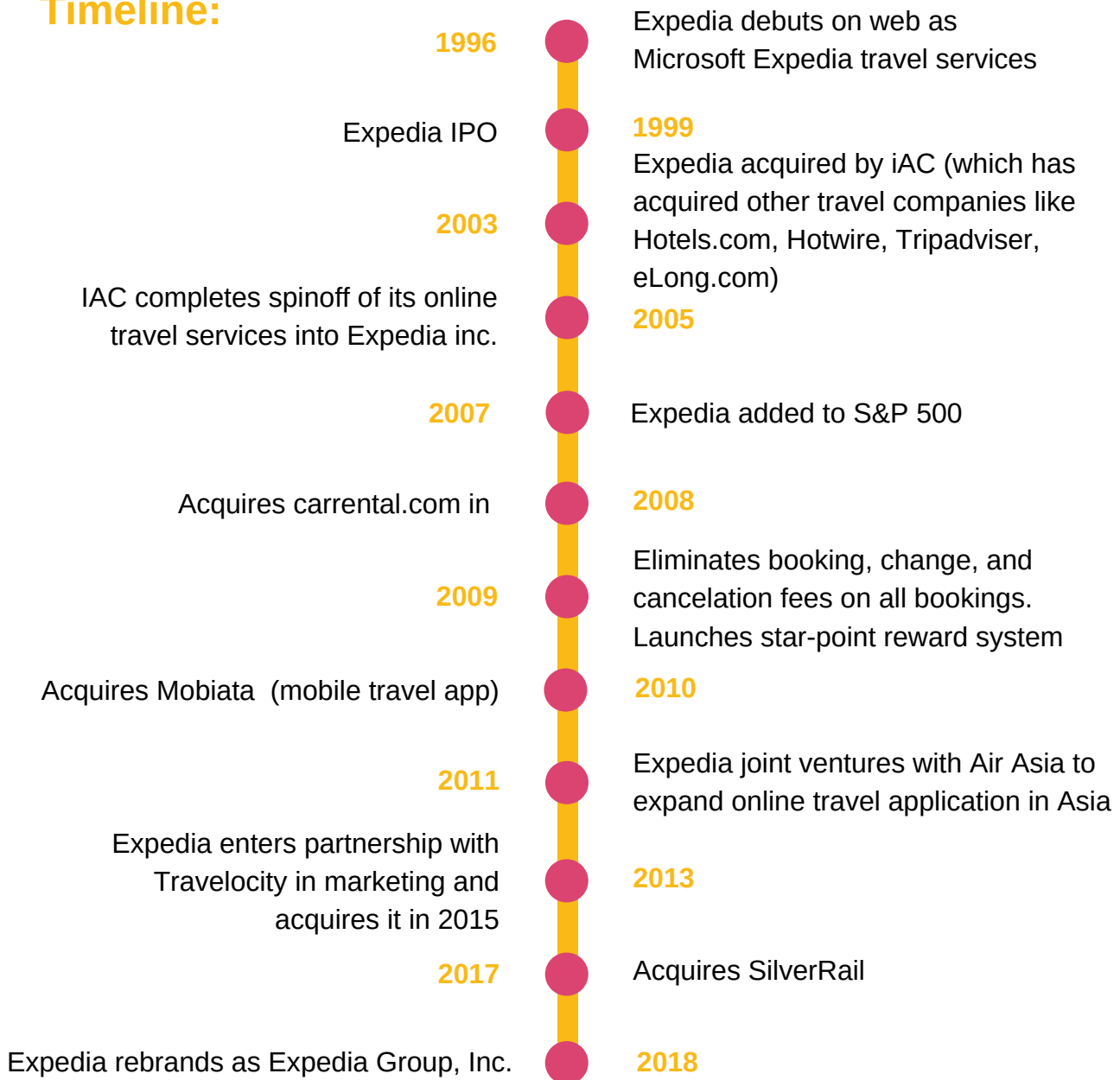




Company Background

Expedia is one of the world’s largest travel platforms with over 100 thousand reviews on Android (CleverTap, 2018). It was first established in 1996 online as Microsoft Expedia Travel Services. Throughout the years, Expedia worked tirelessly to build its empire, constantly making strategic acquisitions and partnerships. Today, Expedia has expanded into Expedia Group Inc, is listed on the S&P 500, and has 11.2 billion USD in revenue (Expedia, 2019).

Timeline:





Updates & Expansion

To adapt to the popularization of mobile phones, Expedia acquired mobile travel app company, Mobiata, in 2010. Later on, in 2013, it partnered with Travelocity to further strengthen its online marketing and presence before finally acquiring the company in 2015.

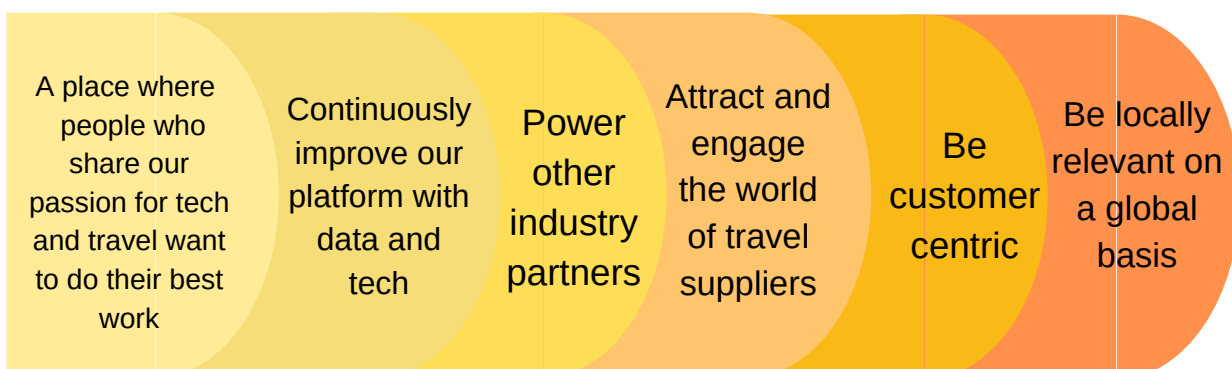


The company has increased the number of engineers to support its platform experiments. Furthermore, it has increased its annual A/B testing to over 1000 tests in an attempt to enhance the user experience for its mobile and online applications. (Trefis Team, 2017)



Strategic Imperatives

The travel industry, as we know it, is a highly saturated and competitive environment. Therefore, Expedia has established a few strategic imperatives to ensure their long-term goals are well documented for its employees to reach. Some of these goals include: to continuously improve its platform with data and technology and to be locally relevant on a global basis.



(Expedia, 2019)



Marketing Strategies

Expedia has also captured users with their onboard and retention processes.

Onboards by:

- Asking users to turn on notification and location as soon as they sign onto the app.
- Stating the value of a particular deal, and the price Expedia is currently offering.

Engages and Retains by:

- Sending push notifications.
- Sending hotel deals to customers who have already booked airfare but have yet to book accommodations (CleverTap, 2018).
- Including images of destinations to trigger excitement and an emotional connection.

Expedia noticed that people prefer to make their bookings on larger screens; there is currently only a 10% mobile booking conversion rate through the Expedia app (CleverTap, 2018). To provide more incentives for people to use and download their app, Expedia introduced promotions like “earn 3 times the points when booking with our app” or “get \$25 off your first hotel booking with our app” (Shaijob, 2016). However, even with these promotions, there is still a whopping 75% cart abandonment in the travel industry (CleverTap, 2018).

The screenshot shows a hotel deal for the Excelsior Hotel. On the left is a night-time photograph of the hotel building. To the right of the image, the text reads: 'Excelsior Hotel' with a 4.2/5 star rating, 'Upper West Side', '1-800-222-0892 • Expedia Rate', 'Free cancellation' with a green checkmark, and 'Economy/Coach nonstop flights included in price' with an airplane icon. On the far right, it says 'Viewed', '4.2/5', 'Very good! (2,384 reviews)', 'In high demand!', 'We have 1 left at', and a price comparison from '\$1,102' to '\$1,033' in red. Below the price, it says 'Per person includes flight + hotel' and a green 'Sale!' badge.



So How Does Expedia Retain Users?

1. Expedia leverages user “FOMO” (fear of missing out) with messages like "Don't miss out, this offer is only for a limited time only!"
2. Informs you of price changes e.g. “Historically flights to New York will increase 55% from May 15-30th, so book now!” Expedia purposely exposes the exact date and percentage increase to inflict a powerful "urgency message" to users (Shaihob, 2016).
3. If a user has not booked with Expedia for a while, Expedia will not send a typical “We missed you” e-mail. Instead, they will send you promotional codes and coupons to gain back your business (Shaihob, 2016).

Hotel Hendricks ★★★★★ New to Expedia!

Midtown
1-800-222-0892 • Expedia Rate

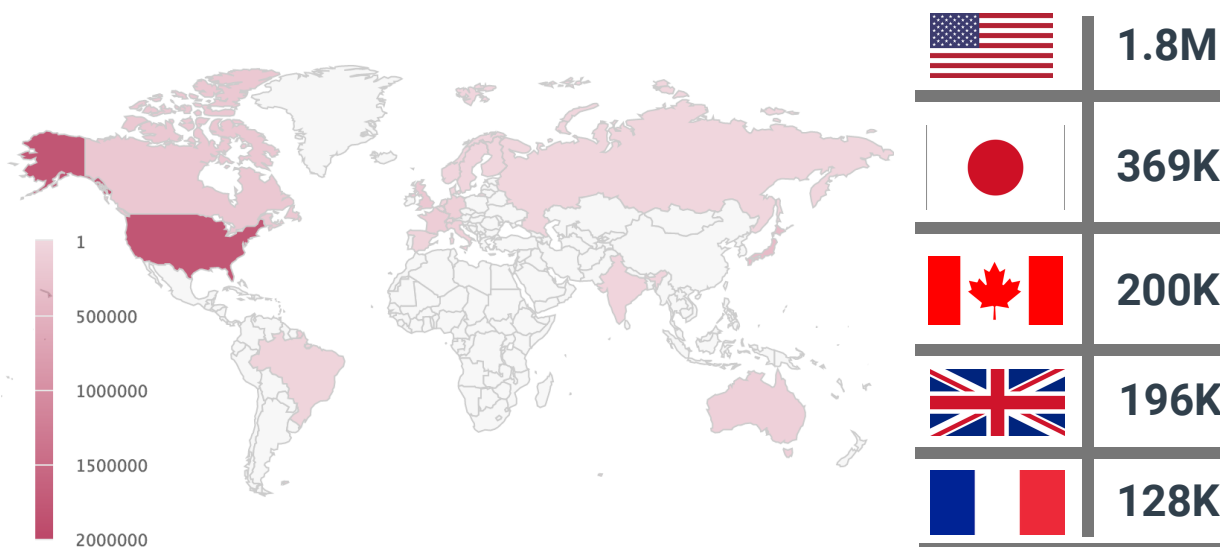
✓ Free cancellation

✈ Economy/Coach nonstop flights included

\$1,015 \$952
Per person includes flight + hotel

in price
36 people booked this property in the last 48 hours

User Acquisition Worldwide:



Past 6 months data
Source: Apptweak.com, June 27 2019

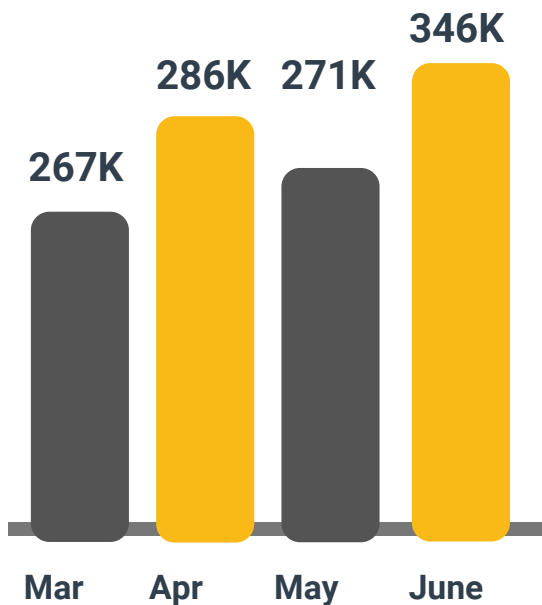


Top High Volume Organic Keywords

Top 12 High Volume Keywords	Ranking	Monthly Keyword DLs	Expedia Downloads
Expedia	#1	60,528	49,646
Delta airlines app	#7	108,471	6733
United airlines app	#6	183,158	3754
Expedia com	#1	3973	3477
Hopper	#4	52,294	2362
Delta	#7	37,416	2000
Southwest airlines	#6	117,868	2127
Expedia app	#1	2435	1998
My Disney experience	#3	35,558	1966
Travel	#2	16834	2058
Trivago:	#3	33,813	1923
Travelocity	#2	19,344	1906

US App Store - iOS
Source: Apptweak.com, June 27 2019

Monthly Downloads



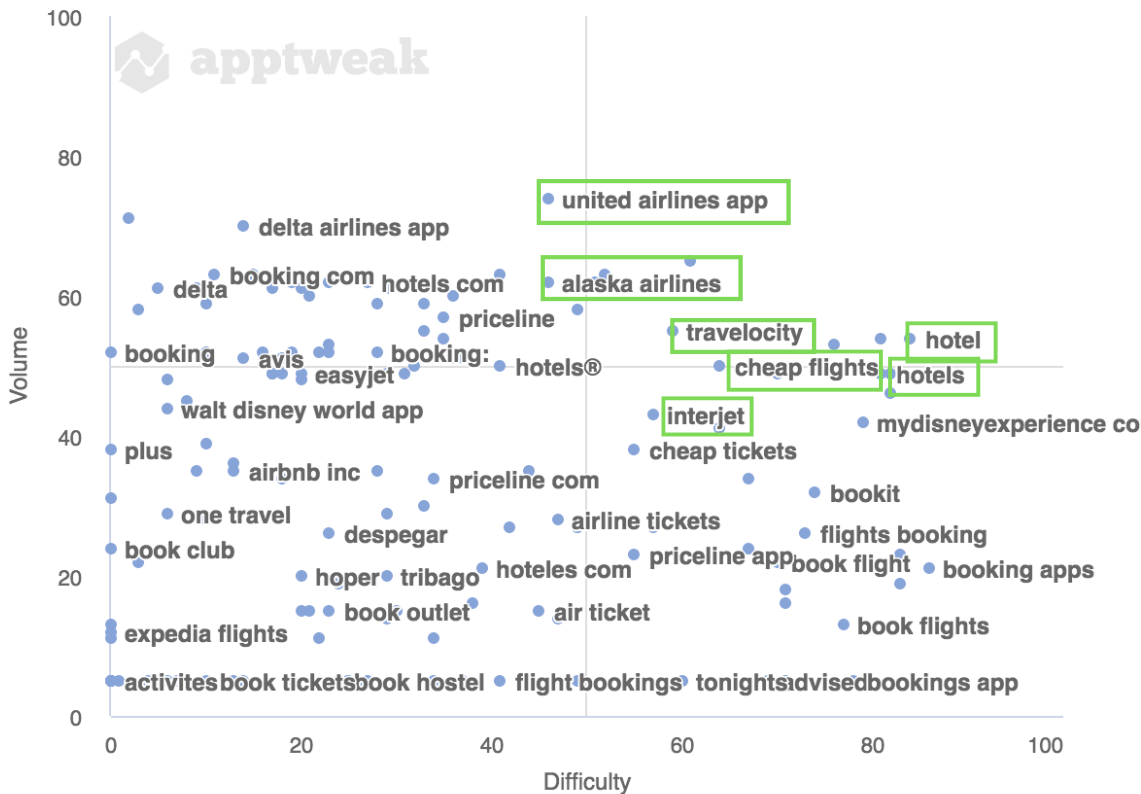
US App Store - iOS data
Source: Apptweak.com, June 27 2019

As for Expedia's main organic keyword strategy in the US Appstore, their main focus is to stay in the top 10 ranking with the **most important airlines**. This strategy drives **12,614+** monthly downloads.

They also have a bidding strategy ranking for their competitors and new upcoming accommodation companies.

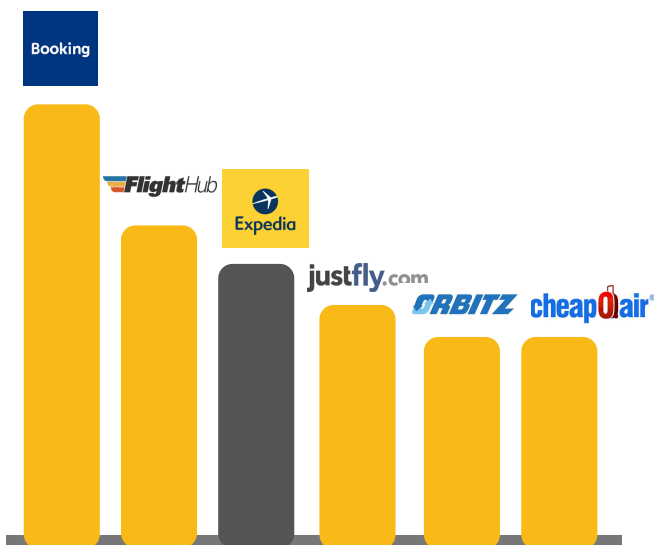


Current Keyword ASO Ranking Strategy

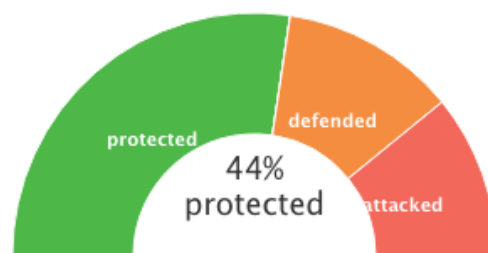


Keyword Bidding ASA & Competitors

Ads Protection Status



Share of Voice Analysis
Source: Apptweak.com, June 27 2019



The left bar chart illustrates the current keyword bidding competition against Expedia and shows Booking as the first and Flighthub as the second main "attackers" on its organic keywords.



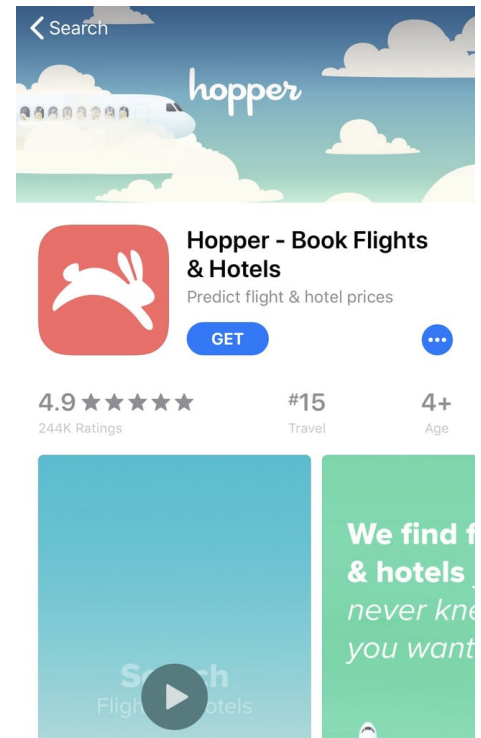
HOPPER

Company Background

Hopper is a mobile app for iOS and Android devices based in Montreal and Boston. It uses big data and research to predict future flight pricing with a 95% accuracy (MAU, 2019). Hopper will then suggests to users whether to wait to purchase their plane tickets or accommodations, or to book now.

However, Hopper was not always an app company. In fact, Hopper was founded back in 2007 under the name OpenSpaces Inc. (Bloomberg, 2019). The company then had very little growth and name recognition. In 2015, Hopper launched its app powered by AI and Big Data.

By the end of 2015, Hopper was named one of Apple’s best in 2015. In 2016, Hopper earned the Google Play Award for Standout Startups of 2016, the Webby Award for Best Travel App, and the Google Play Best Apps of 2016. Now with over 48 million downloads, Hopper has surpassed the number of downloads in comparison to any other travel app. It has reached the #1 travel app ranking position in over 37 countries and is ranked as one of the 10 travel apps in 95 countries (Hopp 2019).





Staying Competitive as a Late Entrant

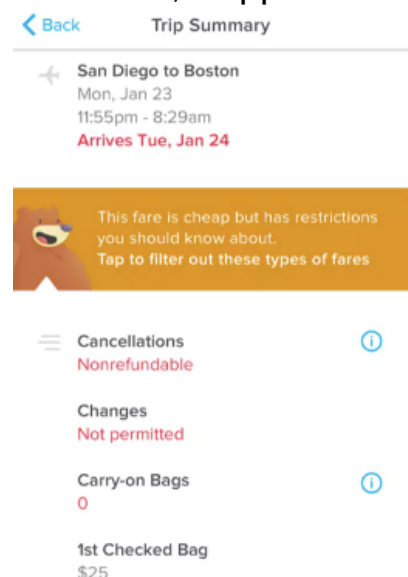
Hopper's CEO, Fredric Lalonde, worked at Newtrade Technology before starting Hopper. From his own experience, he found that online travel booking was no longer enjoyable. People were being rushed through sites like Expedia and Bookings.com, chased by messages like "Currently, 6 other people are looking at this booking" and "This price is likely to rise" (MAU 2019).

Hopper decided that it wanted to focus on retaining users. Its aim was to attract users well before the actual airfare purchase and to improve the average user experience. When selecting platforms, Hopper chose the niche market of an app-only platform rather than a web, or web and app, platform. Though the decision was unconventional, it was strategically made. Large companies like Expedia and Bookings had already mastered web presence to leverage the search engine. It would not only be difficult for Hopper, a startup, to compete with these well-established, bigger travel giants, but the CPT would be high as well (Lalonde, 2019). In addition to strategic platform selection, Hopper made customer service its key priority.

Case: when WOW air announced that it would no longer be operating, only Hopper refunded its customers; no other travel agencies did so (Lalonde, 2019)

Fair Bear:

Sometimes, there are hidden additional fees such as insurance, extra baggage fees, or taxes. These fees can add up and cause airfare to be extremely expensive. To provide full transparency, Hopper developed Fair Bear. Fair Bear highlights all relevant additional fees that may apply with the airfare, allowing users to book their flight worry-free (Perez, 2017).





Marketing Tactics

With high market saturation in most industries, traditional marketing is no longer as effective. Companies now need to focus on creative and ways to make themselves stand out from the hundreds of other companies. Hopper decided to leverage animated animal characters to establish an emotional connection with its users. Studies have shown that when we see animals, we think of companionship, loyalty, obedience, and innocence. These emotions will subconsciously trigger a positive association to the company (Shutterstock, 2018).

- The second largest category of mascots for companies is animal characters (Atanasova, 2019).
- Companies with mascots that match their names (e.g. Jaguar, Panda Express, and Hopper) can be more memorable to users, since people will also see the brand when they see the animals (Atanasova, 2019).



Product Analytics Strategy

Hopper's main focus is retention; therefore, social media marketing weighs heavily with the company. It wants to capture its users well before the time of purchase. Through social media channels, Hopper knows customers' preferences and is better able to get their attention. Social media allows Hopper to spend 1,000 times less in marketing and have the most travel app downloads in North America (MAU 2019).

Flight deals have also worked well for Hopper to retain customers. According to Google, deals and discounts is the number one reason that drives users to download apps (MAU 2019).

Today, Hopper focuses on international growth. Currently its users can buy flights in more than 160 countries. (Hofherr, 2017)

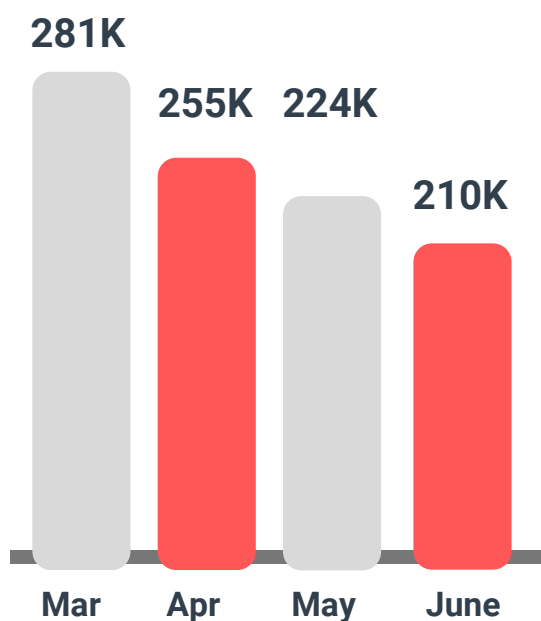


Top High Volume Organic Keywords

Top 12 High Volume Keywords	Ranking	Month Keyword DLs	Hopper Downloads
Hopper	#1	52,294	42,893
Delta airlines app	#3	108,475	10,799
Hopper app	#1	5343	4383
United airlines app	#7	183,158	4075
Hopper flights	#1	13,243	3978
Flight	#2	14,295	3906
Southwest airlines	#5	117,868	3638
Delta	#4	37,416	2944
Hooper	#1	3527	2893
Southwest airline app	#2	30,449	2773
Skyscanner	#2	29,591	1940
Flights	#2	14,230	1625

US App Store - iOS
Source: Apptweak.com, June 27 2019

Monthly Downloads



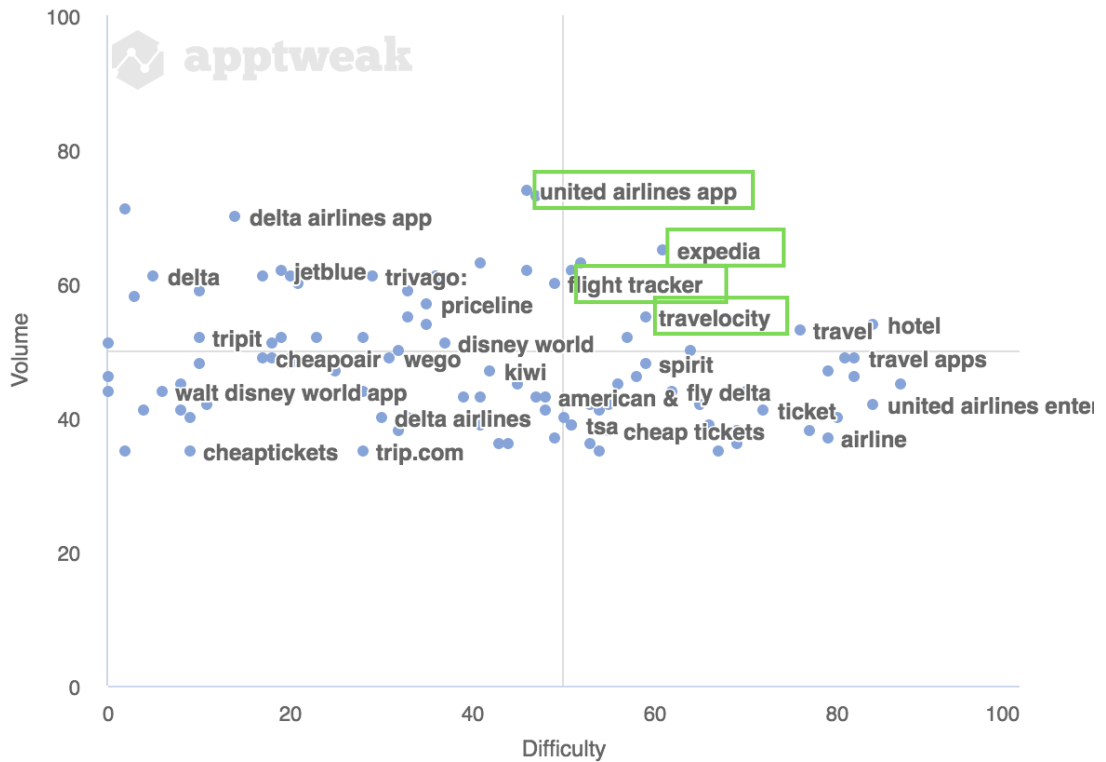
US App Store - iOS data
Source: Apptweak.com, June 27 2019

Hopper's main organic keyword strategy in the US Appstore is to rank and to control their branded keywords. This includes targeting all words related to hopper, hopper app, copper and hooper. This strategy drives **55,000+ monthly downloads**.

They also have a bidding strategy ranking for their competitors and the Spanish market.



Current Keyword ASO Ranking Strategy



Keyword Bidding ASA & Competitors

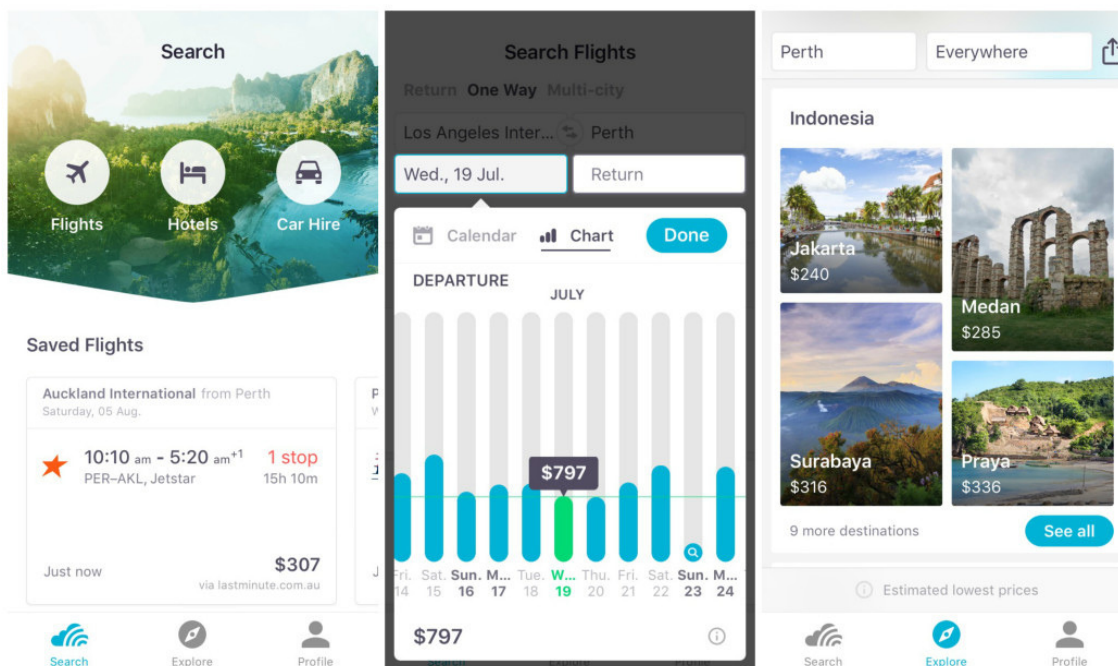
We found 3824 paid keywords for this app. Check the detailed SOV spread of the top paid keywords.

Top Paid Keywords	Rank	Vol.	Diff.	SOV	All Apps SOV Spread
copper	4	23	1	60%	60% +1
hotels tonight	20	46	58	11%	19% +15
hoteltonight	18	45	8	11%	14% +18
couchsurfing	unranked	43	3	11%	28% +11
hotel tonight	20	59	10	10%	22% +17
flight tickets	2	27	49	8%	26% +11
flight ticket	2	13	48	7%	27% +8
vuelos	unranked	24	54	7%	21% +13
flight & car	1	5	73	7%	34% +14
kayak flights hotels cars	unranked	47	29	6%	16% +18



Company Background

Skyscanner was founded in the United Kingdom in 2003. Bonamy Grimes, Gareth Williams, and Barry Smith were frustrated that there was no easy way for them to find cheap flights. So, they came together to create Skyscanner. By 2007, Skyscanner raised over 2.5 million pounds in venture capital injections from Scottish Capital Partners. Then in 2012, it opened its first office in China as part of its international expansion (Skyscanner, 2011). In 2013, it opened its first office in the United States. By the time 2016 came around, the company was valued at 1.6 billion dollars before it was sold to Ctrip in 2017 (Price, 2016). By 2018, Skyscanner had decided to launch a mobile app on both the App Store and the Google Play Store (Skyscanner, 2011). Today, the platform has over 60 million users per month. It has over 1,000 employees and offices in 11 countries including Barcelona, Beijing, Miami, and Singapore (Skyscanner, 2019). The platform is currently available in 30 languages, and its head office is still located in Edinburgh, United Kingdom.





Staying Competitive in a Saturated Market

Skyscanner isn't like Expedia, in that it doesn't hold strong name recognition by being the oldest player in the market. Nor is it like Hopper, which got ahead by implementing new creative marketing strategies. So how does Skyscanner stay competitive in such a saturated market?

- A key focus that Skyscanner adopted was growth hacking. At an early stage, Skyscanner chose to stay away from traditional marketing like PR and content (Carroll, 2018). Instead, it developed its marketers into growth hackers who were knowledgeable in data, programming, and marketing facets for both commercial and product management.
- Skyscanner also had a strong first mover advantage. It may not have been the first online travel agency, but it was the first that specialized in cheap flights only (Carroll, 2018).
- Recently, it has also adopted meta-search models and is currently partnering with OTAs and airlines to provide its users with the best deals in the market (Carroll, 2018).
- Today, Skyscanner leverages its artificial intelligence to automate its algorithm to analyze and organize big data to simplify the search processes for its users (Carroll, 2018).

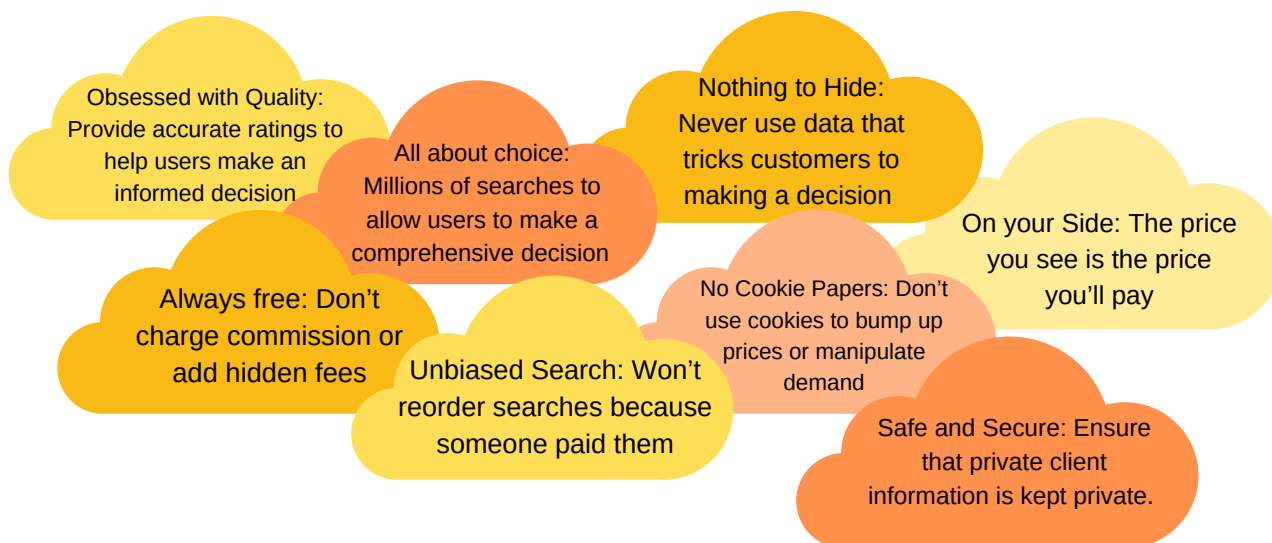


Slide from "GHConf18— Moving from a Traditional to a Growth Oriented Organization"



Marketing Tactics

Customer Charter:



(Skyscanner, 2018)

1. Aims to secure product-market fit before investing in marketing. Its focus is on the needs of its users. Skyscanner believes that the quality of user experience and the product will lead to retention and, ultimately, sustainable long-term growth.
2. Uses social media like Facebook and WeChat. Focuses on producing connections and conversations instead of automated messages to show users that they're valued (Carroll, 2018).
3. Launched video campaigns like the "Born Honest" campaign. These campaigns aim to communicate the honest pricing Skyscanner offers to its customers. The goal is to bring more "Spontaneous Awareness" to the company, especially since it currently lacks brand awareness and ROI. (O'Reilly, 2017)
4. Measures its campaigns using the growth success metric by Dave McClure (AARRR metric) which measures: Acquisition, Activation, Retention, Referral, and Revenue (Larasati, 2017).
5. Uses tracking to measure its conversion rate. Skyscanner currently uses a custom-built device. However, companies can use publicly available platforms e.g. Google Analytics (Larasati, 2017).

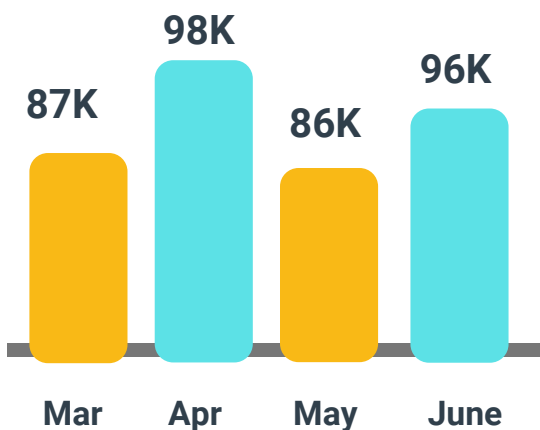


Top High Volume Organic Keywords

Top 12 High Volume Keywords	Ranking	Month Keyword DLs	Skyscanner Downloads
Skyscanner	#1	29,591	24,272
Hopper	#2	52,294	4785
Kayak flights hotels cars	#1	10,911	3277
Kayak flights hotels & cars	#1	10,575	3176
Sky scanner	#1	3409	2796
Delta airlines app	#12	108,475	1659
Hopper flights	#2	13,243	1485
Google flights	#4	14,984	1425
Skyscanner travel deals	#1	1516	1244
Skiplagged	#3	16,898	1173
Skyskanner	#1	1338	1098
Skycanner	#1	1308	1073

US App Store - iOS
Source: Apptweak.com, June 27 2019

Monthly Downloads



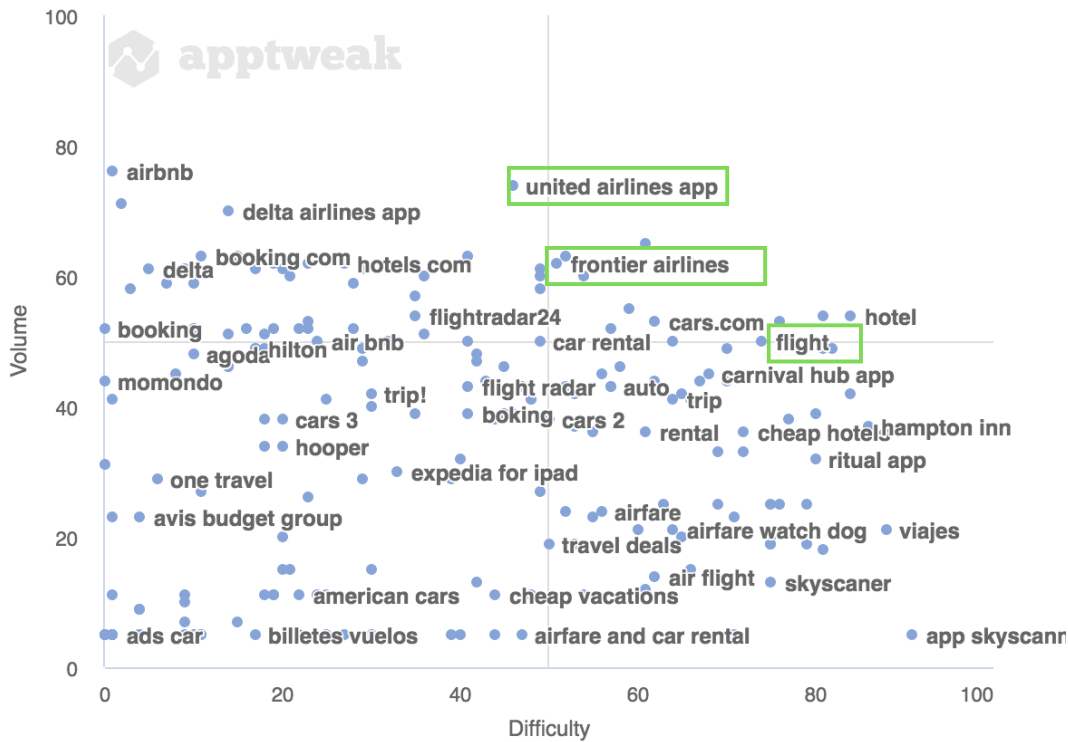
US App Store - iOS data
Source: Apptweak.com, June 27 2019

Skyscanner's main organic keyword strategy in the US Appstore is to rank and control all keywords related to flights, cheap flights, google flights, booking flights and more. This strategy drives **11,000+ monthly downloads**.

They also have a bidding strategy ranking for major airlines companies.

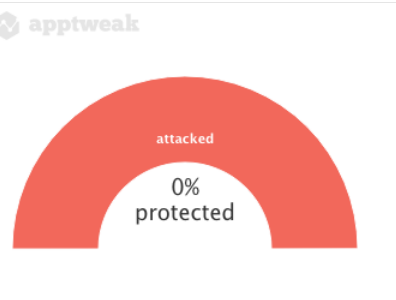
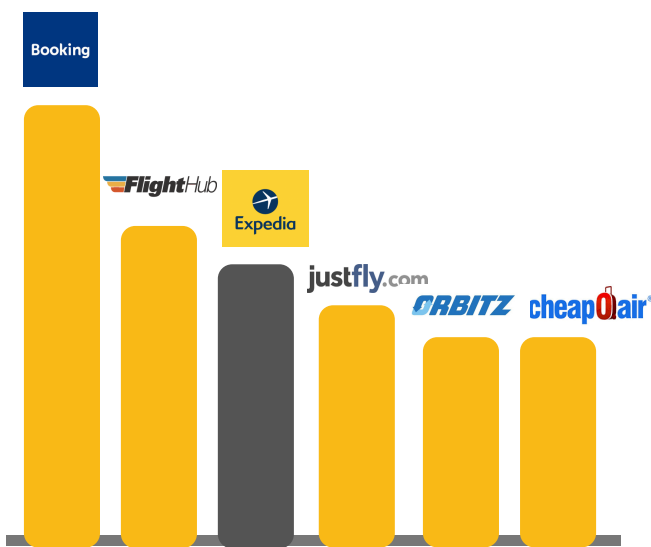


Current Keyword ASO Ranking Strategy



Keyword Bidding ASA & Competitors

Ads Protection Status



Share of Voice Analysis
Source: Apptweak.com, June 27 2019

Skyscanner is not protecting their organic keywords properly. There is big competition from booking and justfly bidding against Skyscanner keywords.

CONCLUSION

Through researching and analyzing the three companies above, we can see the competitiveness of the industry. Though the three companies are different in both product, platforms and age, they do have a few commonalities when it comes to their marketing. The first being the implementation of alternative marketing tactics, since traditional marketing has become obsolete. People have a shorter attention span for an ad. They now value word of mouth, ratings, and reviews more (AppsFlyer, 2018). According to Hubspot, organic users have 2.5 times higher chance to book a trip, and yields, on average, 60% higher revenue than non-organic users (AppsFlyer, 2018). Therefore, companies are using different methods, such as creative campaigning and better user experience, to lure new users and retain existing users.

The second commonality we noticed is the importance of apps and the lack of user conversion to apps. Out of the three companies, only one has successfully mastered the app platform. Hopper was successful in fully integrating into the app world. However, this is because it made a strategic decision early on to only launch a mobile app-only platform. Currently, both Expedia and Skyscanner are struggling to convert their users from web browsers to mobile apps.

What's next for the travel industry? The most important factor to focus on is app optimization. Develop an easily accessible app, provide incentives for customers to convert to apps, and optimize your ASA and Google Search Ads. Mobile apps are where the future lies. Without successful adaptation into the mobile apps world, companies and their services will become obsolete. To learn more, contact us at hello@appgrowthnetwork.com

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