



United States Travel Trendlines

Benchmarking the performance of Travel market segments and specific apps



1

[Top Travel Apps](#)

03

2

[Online Travel Agencies](#)

07

3

[Hotels](#)

14

4

[Airlines](#)

18

5

[Car Rental](#)

24

6

[Cruise Lines](#)

28

7

[Our Data](#)







34

01

Top Travel Apps

All Apptopia estimates are inclusive of those from iOS and Google Play.

10 Most Downloaded Travel Apps in 2021

Worldwide		United States		Europe	
#1	 Google Maps 106M	#1	 Uber 31M	#1	 Google Maps 18M
#2	 Uber 94M	#2	 Google Maps 27M	#2	 Booking.com 14M
#3	 Booking.com 63M	#3	 Lyft 20M	#3	 Google Earth 10M
#4	 Google Earth 57M	#4	 Hopper 15M	#4	 Airbnb 7.6M
#5	 Airbnb 44M	#5	 Airbnb 12M	#5	 Uber 6.1M
#6	 DiDi 27M	#6	 Booking.com 11M	#6	 TIER 4.6M
#7	 Bolt 25M	#7	 Vrbo 10M	#7	 DB Navigator 4.5M
#8	 Lyft 23.3M	#8	 Google Earth 9.9M	#8	 Ryanair 4.4M
#9	 Where is my Train 23.1M	#9	 Expedia 8.9M	#9	 Trainline 4.3M
#10	 Grab 23M	#10	 American Airlines 8.5M	#10	 RinGo Parking 4.2M

WHAT TO KNOW

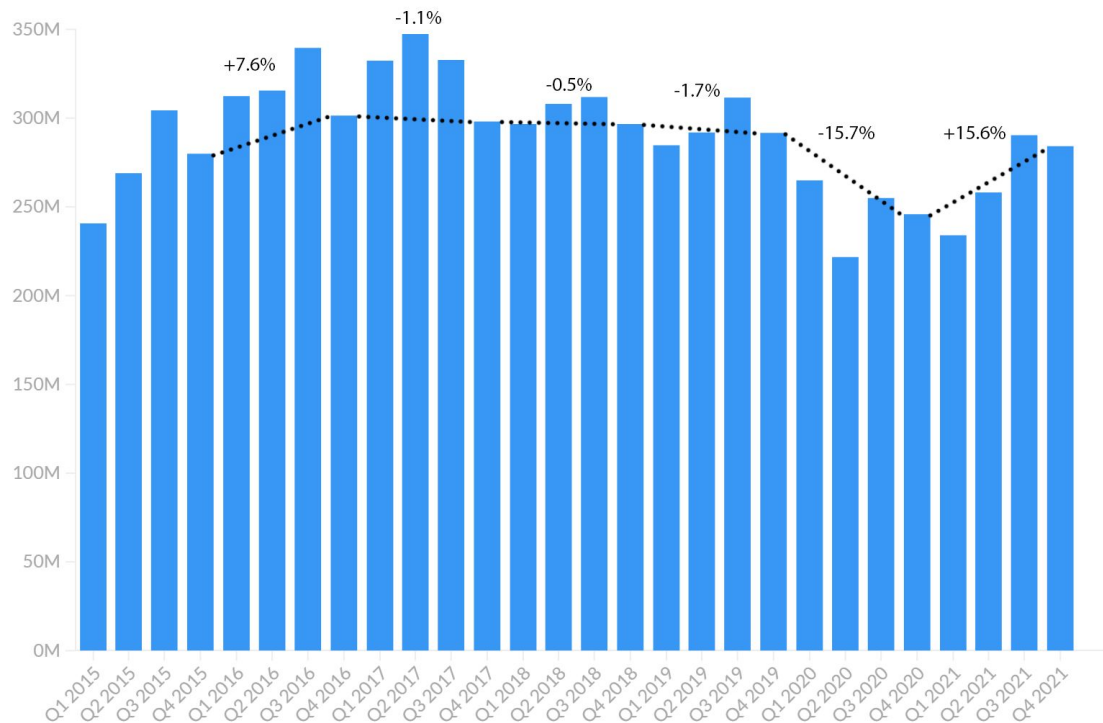
Google Maps dominates navigation globally and is the only true navigational app to make any of our [top downloaded lists](#).

Half of the worldwide list is comprised of rideshare apps, showing the extent to which taxis and maybe even public transit have been displaced.

The only scooter rental app to make it into a top 10 list was TIER, while RinGo was the only [parking app](#) to do so. Both can be found in Europe's top chart. For Europe's data, we specifically looked at the countries of Germany, United Kingdom, France and Italy.

The top 100 Travel apps' downloads grew 15.6% YoY

Quarterly downloads of the top 100 travel apps (aggregated per quarter), U.S.



WHAT TO KNOW

Quarterly downloads of the top 100 Travel apps across the U.S. have mostly recovered to pre-pandemic levels. However, top travel app download numbers haven't changed too much over the years as you can see in the chart to the left.

Seasonality plays into the performance of travel apps, with the third quarter routinely being the peak for the year.

As you'll see in the slides that follow, consumer interest in traveling is high. We see this through the bounceback in app usage for a variety of travel sectors.

U.S. Market Overviews

Online Travel Agencies

Hotels

Airlines

Car Rental

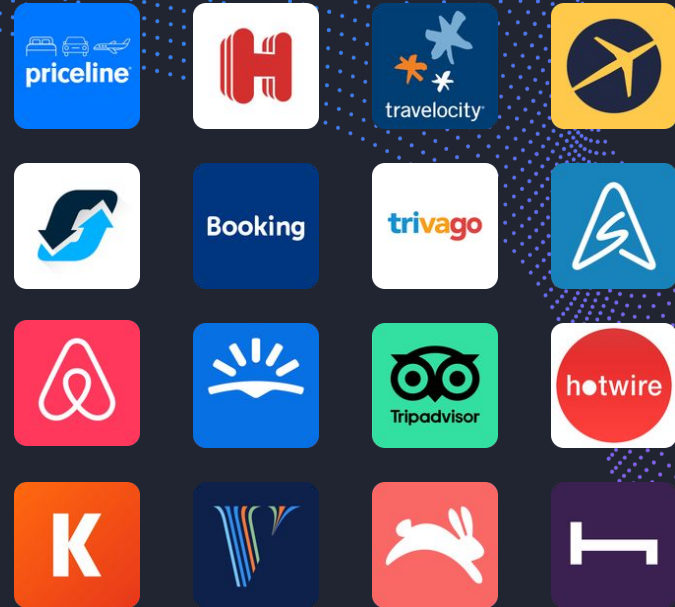
Cruise Lines

All Apptopia estimates are inclusive of those from iOS and Google Play.

02

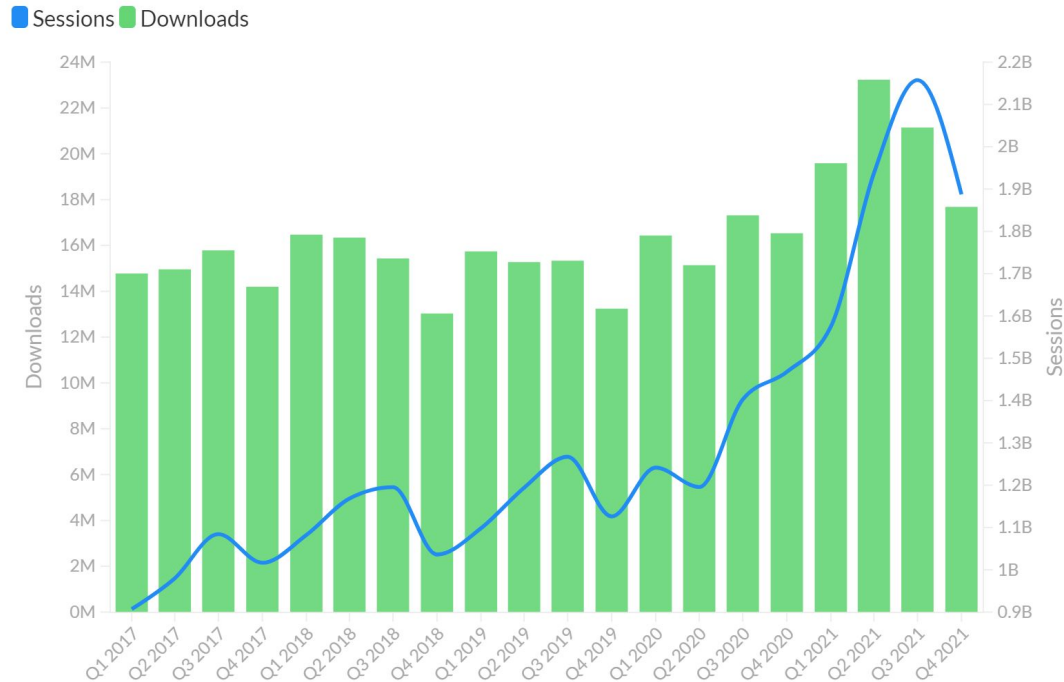
Online Travel Agencies

Apps used for planning and booking travel items (airlines, accommodations, etc.) - usually these companies generate revenue from referral fees.



The top 16 online travel agency apps

Quarterly downloads and user sessions, U.S.



WHAT TO KNOW

Usage of OTA apps never took a strong turn for the worse unlike other sectors of travel. It's not to say that bookings did not decrease substantially but usage of these apps actually increased dramatically once the pandemic set in.

Our grouping of OTA includes Airbnb and Vrbo, which were viewed as safer options than hotels and don't necessarily require air travel to get to.

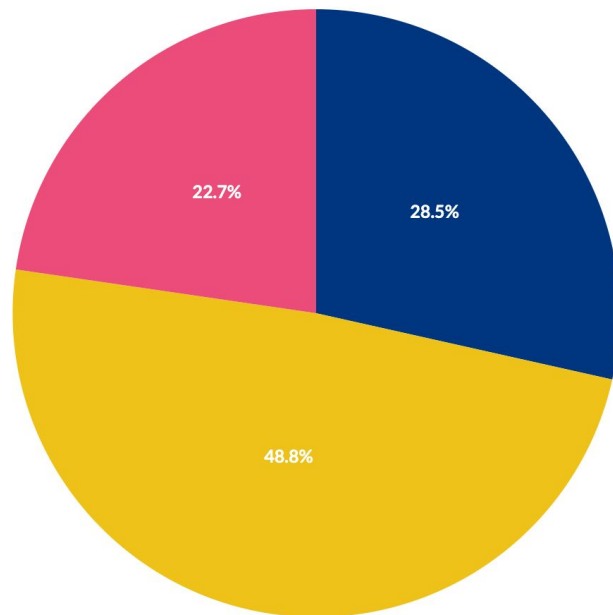
Increased usage for traditional OTA apps could be due to:

- Rescheduling
- Cancelling
- Planning far ahead
- Escapism browsing

Most OTAs in the US are owned by just three companies

Market share by MAUs (Sep '21 - Feb '22), U.S.

- Booking Holdings [Booking.com + Priceline + Kayak + Agoda]
- Expedia Group [Expedia + Vrbo + Hotels.com + Hotwire + Orbitz + Travelocity + Trivago]
- Airbnb [Airbnb + HotelTonight]



WHAT TO KNOW

Expedia Group is the dominant force on mobile as it pertains to online travel agencies in the United States. It does have a leg up as it owns three more properties than Booking Holdings and five more properties than Airbnb.

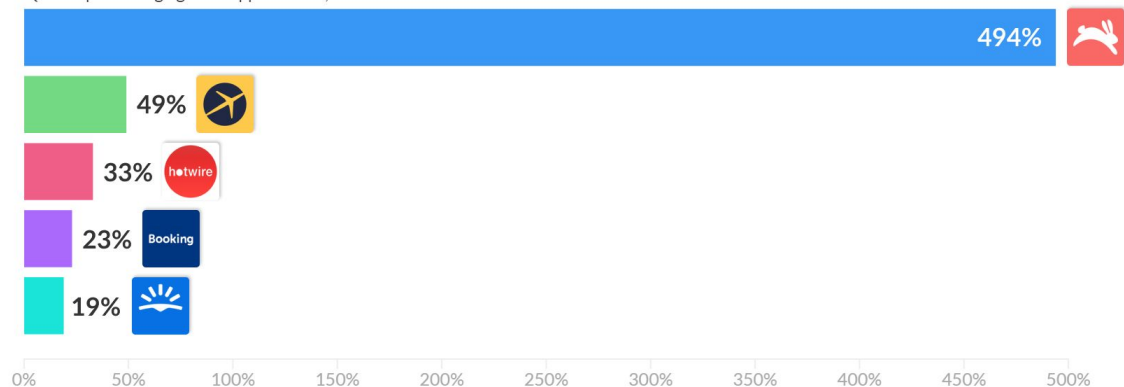
Booking Holdings' Agoda is much more popular in Asia than it is in the United States and is not included in any data on the slides in this report.

Top OTA apps not owned by any of these three companies include Hopper, Skyscanner, Tripadvisor and Skiplagged.

Fastest growing OTA apps

Hopper Expedia Hotwire Booking.com Skyscanner

Q4 YoY percentage gain in app sessions, U.S.



Create your own custom report on your competitors here

WHAT TO KNOW

Hopper's session growth is largely due to its influx of new users. It went from being downloaded 5.3M times in 2020 to being the most downloaded OTA app in 2021 with 15M. There's more on Hopper in the next slide.

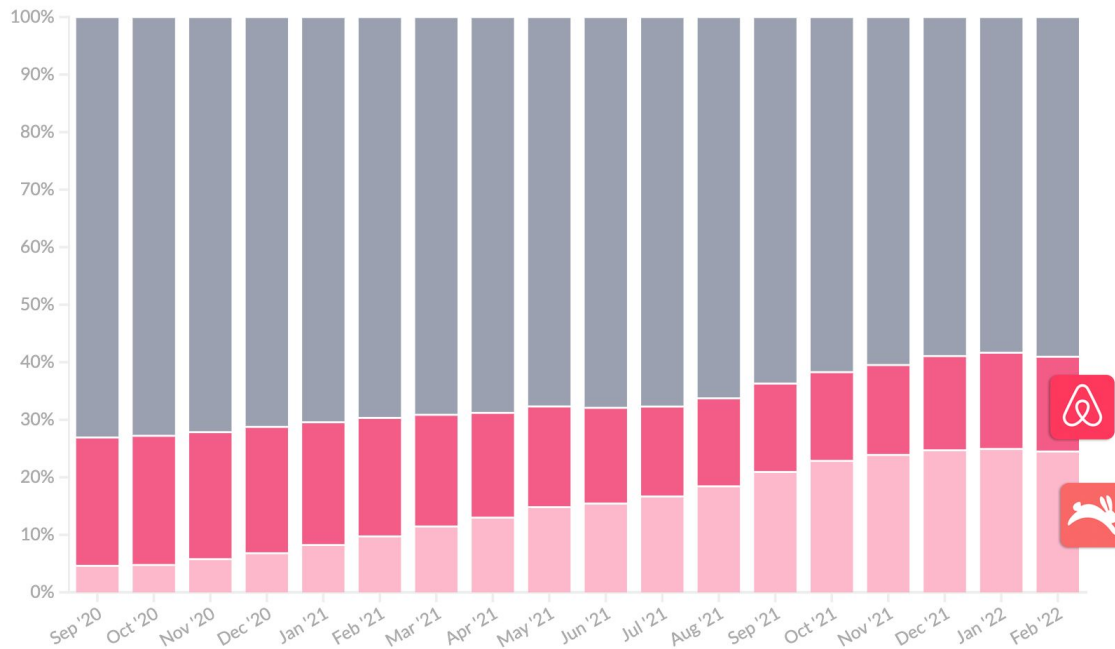
Expedia used a combination of tactics to grow:

It started off the year with an exclusive app deal, offering 10% off for a hotel stay. It then turned its attention to ASO in late May, changing its subtitle from "All your travel in one place" to "Find your next vacation rental," in an effort to align itself with the consumer trend of desiring short-term rentals. In late September, it launched an app widget that tempts users with a different "beautiful destination" each day along with facts about the destination. After booking, it displays "relevant upcoming trip data." The widget also integrates with Apple's Quick Note, enabling handwritten notes to be converted to text.

Hopper leaps into the top OTA player by MAUs

Market share by MAU, U.S.

■ Hopper ■ Airbnb ■ Rest of Market (14)



WHAT TO KNOW

Hopper spoke with Apptopia directly for our annual [Worldwide Download Leaders](#) article. They told us that the pandemic fueled an appetite for flexibility and the ability to reduce financial risk.

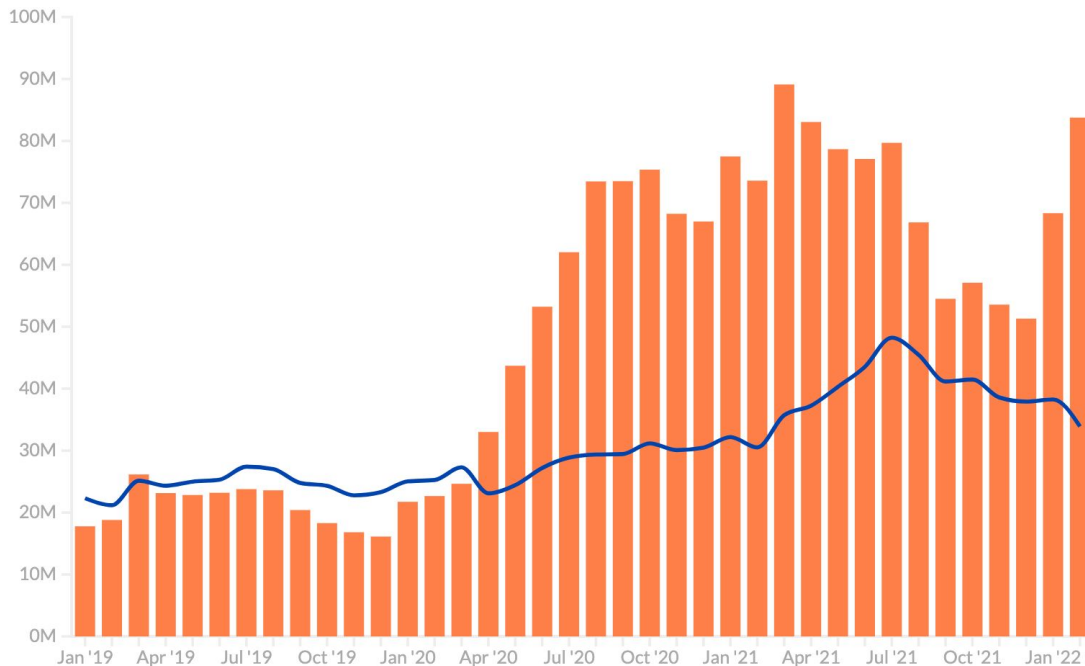
Hopper introduced a suite of travel fintech products, including Price Freeze, Cancel for Any Reason, Flight Disruption Guarantee and more. Today, around 50% of the company's revenue comes from these fintech products, and on average, customers are buying about two fintech products on every trip they book.

In January 2022, Hopper launched Homes, its version of short-term vacation rentals.

The pandemic enabled Vrbo to consistently beat the market

Monthly user sessions, U.S.

■ Market Average (16) ■ Vrbo



WHAT TO KNOW

Historically, Expedia Group's Vrbo was an underperforming OTA app prior to the pandemic.

Now in 2022, it's surging to the tune of 1.5 million US downloads in February, it's most ever for a calendar month.

Engagement is also increasing, with a 43% increase in Sessions per MAU (browsing rentals) over the past six months, more than any other OTA app.

Apps with Mention of **Vacation Rentals**



User Sessions

+352%



Downloads

+180%

WHAT TO KNOW

Apps advertising or noting that they offer vacation rentals/homes in their title, subtitle, description, or recent update, are performing significantly better than those apps that do not.

The data to the left looks at an OTA app's average performance metrics over the past six months. This data excludes Airbnb and Vrbo.

Identify market opportunities & threats faster with data.

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03

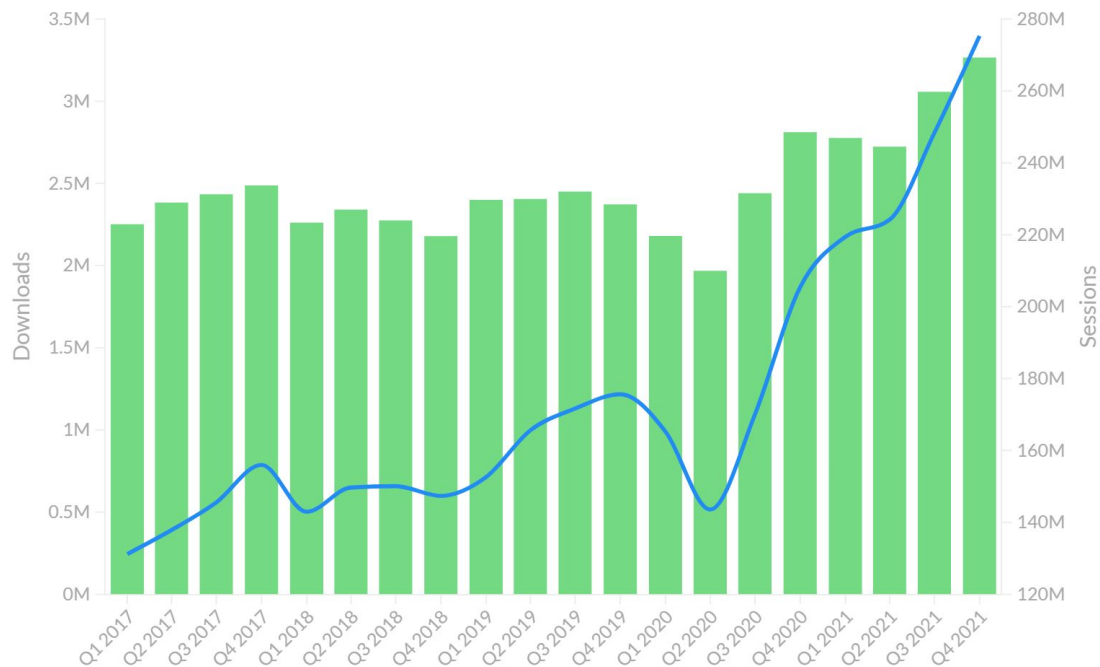
Hotels

Apps published directly by hotels for the purpose of booking a room as well as a tool for guests once on-site.

The top 5 hotel apps

Quarterly downloads and user sessions, U.S.

■ Sessions ■ Downloads



WHAT TO KNOW

While downloads of the top 5 hotel apps dipped 3% YoY in 2021, user sessions increased 34%. That's 2X the prior YoY usage growth rate. This may seem obvious following the pandemic, but the chart on the left shows session acceleration began in Q3 2020.

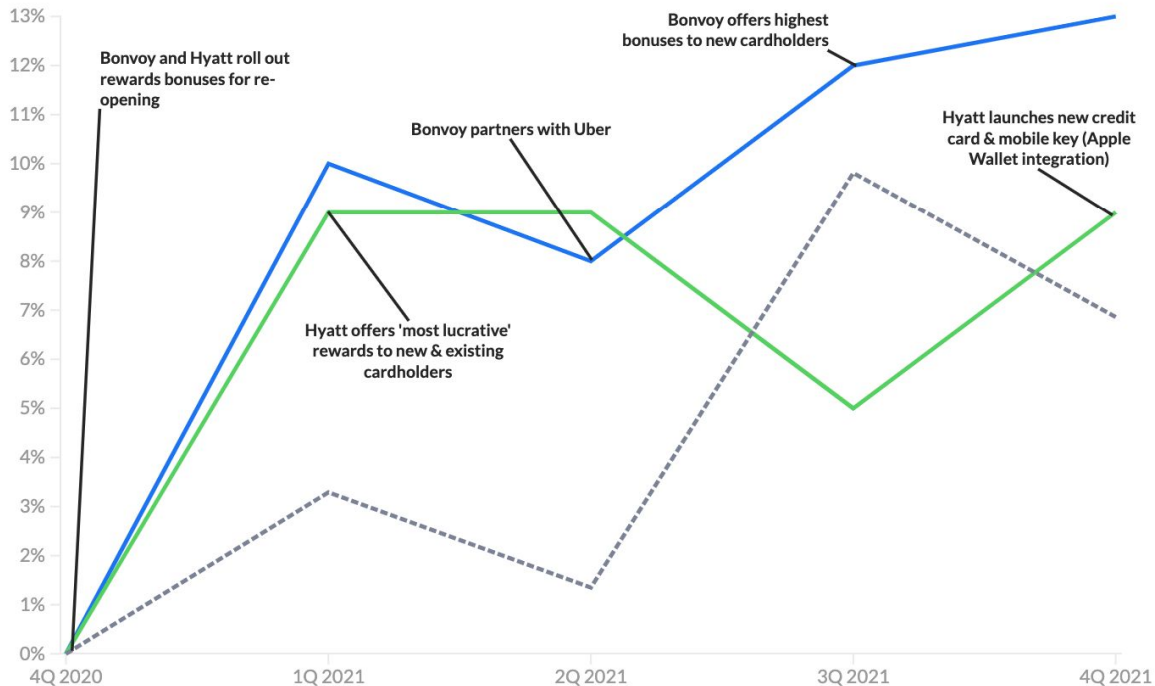
Doubling sessions growth indicates one thing for sure: the apps became more useful, more often. The pandemic accelerated mobile feature development like mobile check in/out and digital keys.

The chart begins in 2017, when hotel chains were threatened by OTAs. Today a guest that booked on an OTA would still want to download and use the hotel app while on their trip thanks to expanded utility.

Partnerships for Bonvoy and Hyatt generated more usage

User session growth rate, U.S.

■ Bonvoy ■ Hyatt ■ Market Average (5)



WHAT TO KNOW

Marriott Bonvoy and World of Hyatt had the highest year-over-year user session growth rates. To increase usage, both apps thought like banks and aimed to become “top of wallet”.

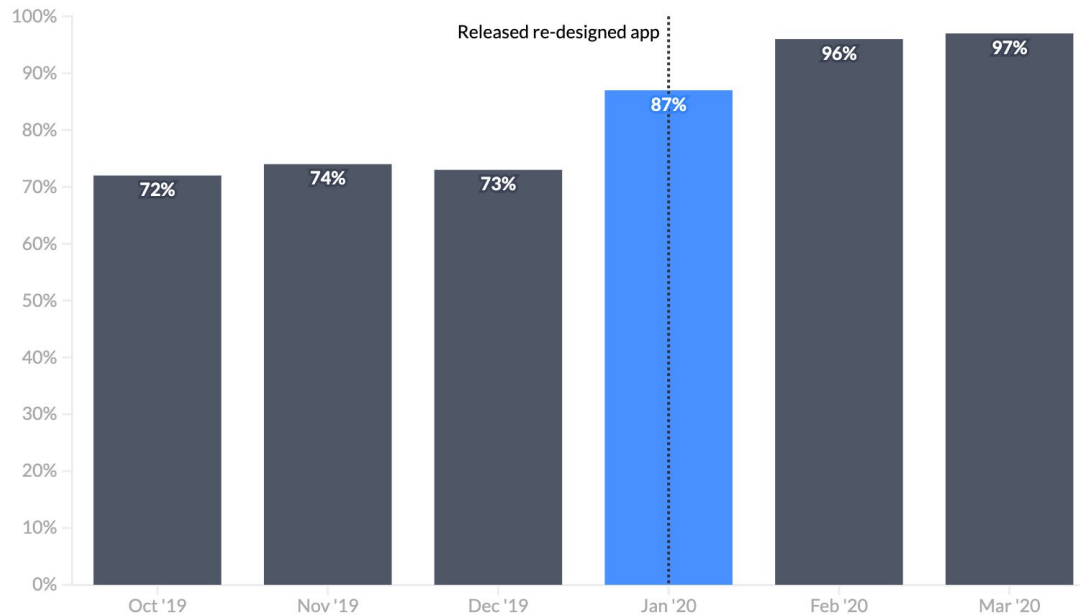
Co-branded card launches traditionally spike hotel app downloads. When the bonuses are *that* good, users earn currency quickly, the reward stays top of mind, and usage follows as they cash in.

Bonvoy and Hyatt took “top of wallet” a step further in 2021. In Q2, Bonvoy partnered with Uber to let cardholders earn points with every Uber ride or meal.

In Q4, Hyatt became top of the Apple Wallet, as Apple’s partner for its hotel key integration pilot. A guest must first retrieve the key from the Hyatt app.

World of Hyatt app re-design improves user sentiment score

Apptopia overall sentiment score*



*Overall Sentiment score ranges from 0% - 100%, where 100% indicates the best positive sentiment score possible. We use a 30-day weighted moving average that takes into account several factors, including: volume of reviews, recency of reviews, ratio of positive and negative reviews.

WHAT TO KNOW

World of Hyatt's [sentiment score](#) jumped 20 percentage points between December 2019 and February 2020, as the hotel chain addressed buggy features and poor design with a brand new app.

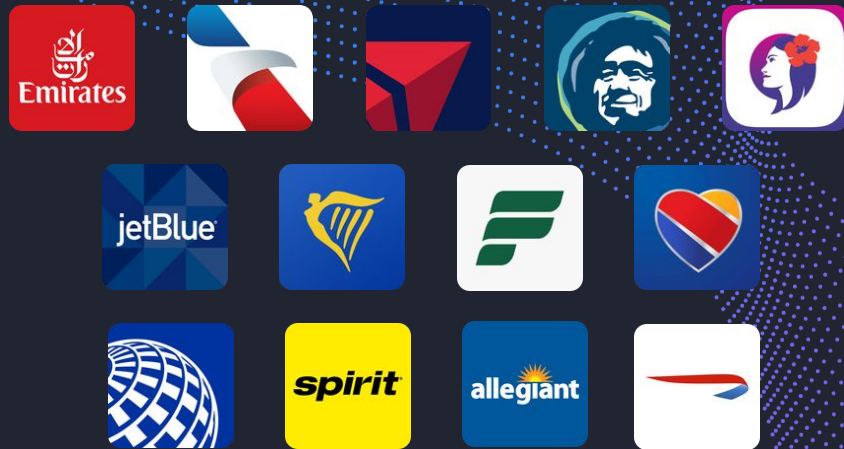
Hyatt guests - which includes business travelers - were impressed with February's release, according to reviews. Now they are able to enjoy the innovative features the hotel chain released in August, including mobile key, chat with concierge, streaming to Chromecast and modify/cancel reservations.

Some features preemptively supported the needs of travelers in March 2020 and beyond. Hyatt was of the first to offer in-app cancellations and develop mobile check in/out.

04

Airlines

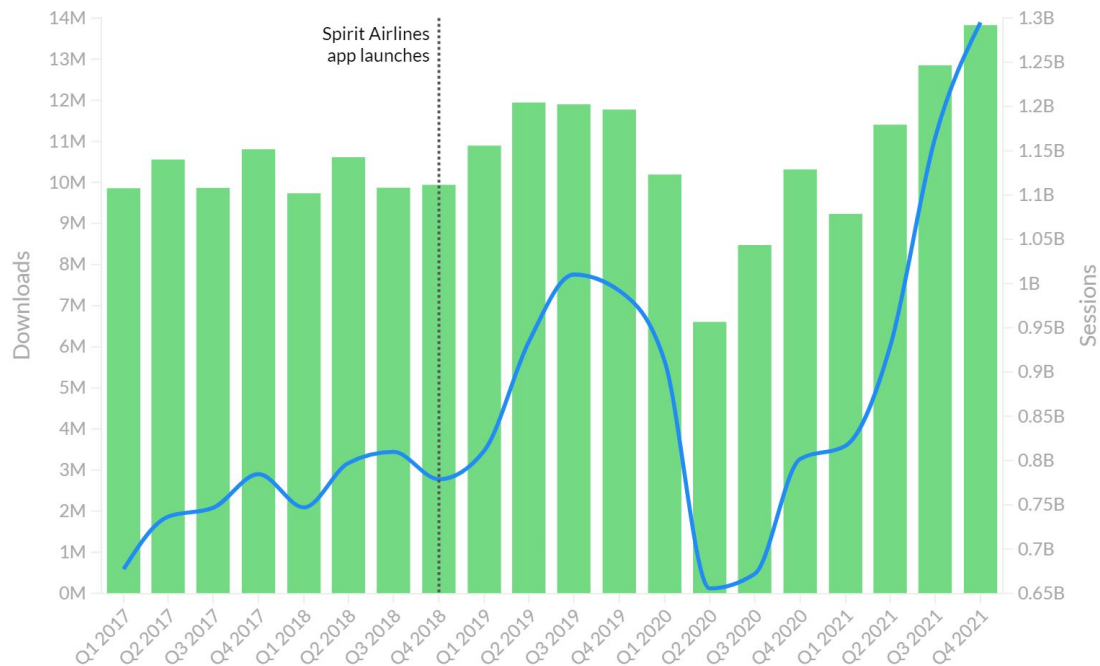
Apps published directly by airlines for the purpose of browsing, booking and managing flights.



The top 13 airline apps

Quarterly downloads and user sessions, U.S.

■ Sessions ■ Downloads



WHAT TO KNOW

Airline app growth and usage benefitted from COVID after an initial plunge, both because users had to cancel/modify reservations more often and it was made easy on the app, and some airlines used the app to host in-flight safety materials/menus.

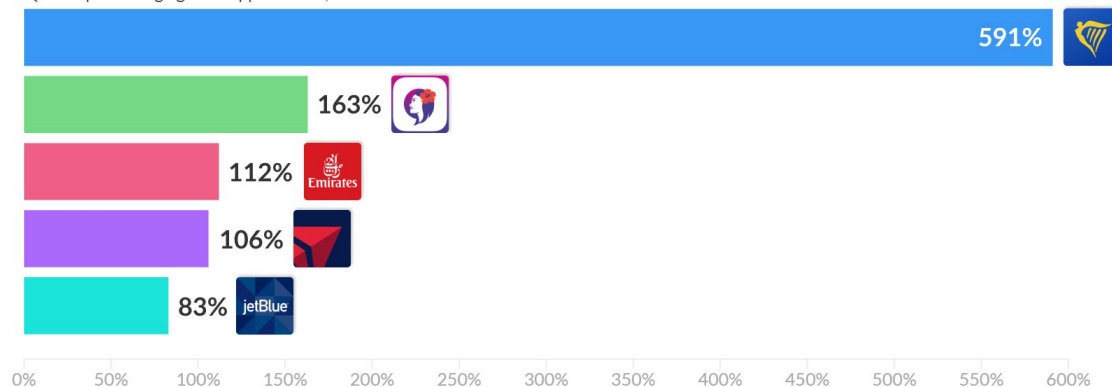
Apps that made it easy to store and access vouchers, as if it was a form of payment, were rewarded with better user retention. Other winning features from 2021 included sorting/verifying COVID documents and resource hubs for the most up-to-date COVID protocols/restrictions.

As usual, the frequency of app updates correlated with positive growth.

Fastest growing airline apps

■ Ryanair ■ Hawaiian Airlines ■ Emirates ■ Fly Delta ■ JetBlue

Q4 YoY percentage gain in app sessions, U.S.



WHAT TO KNOW

The top 3 fastest growers had impressive surges, but by market share in the U.S., each is still a drop in the bucket. You can find airline market share in the slide after next.

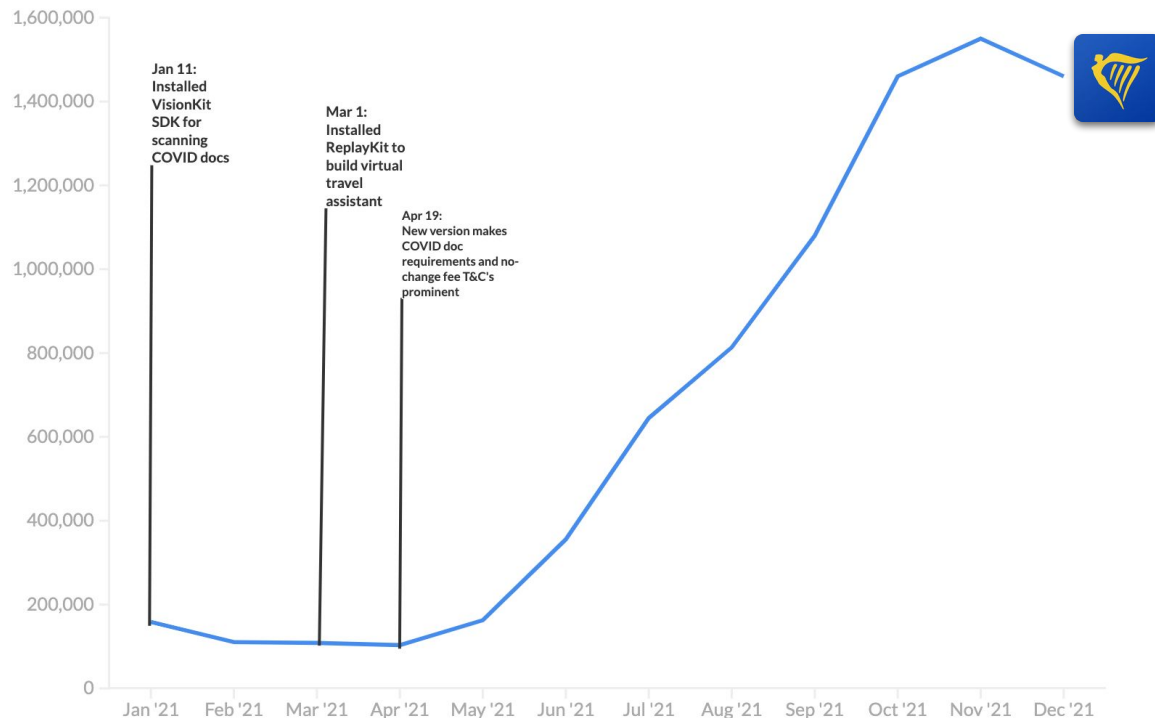
Ryanair's growth in the U.S. is a result of open borders in summer 2021 – and an app that was ready for it. We explain how in the next slide.

Hawaiian built a recommendation engine and improved its mobile check-in, updating the app about every 20 days to do so.

The Emirates app added offline mode in Q4 2020 and hosts in-flight menus instead of sending passengers to a web page.

Ryanair prepared for the resume of international travel and the new needs of travelers

User sessions, U.S.



WHAT TO KNOW

Ryanair got to work in Q1 2021 at the first whisper of Europe reopening its borders to international travelers. Putting itself in the passenger's shoes, it developed features to prominently display FAQs, like travel protocol and cancellation policies.

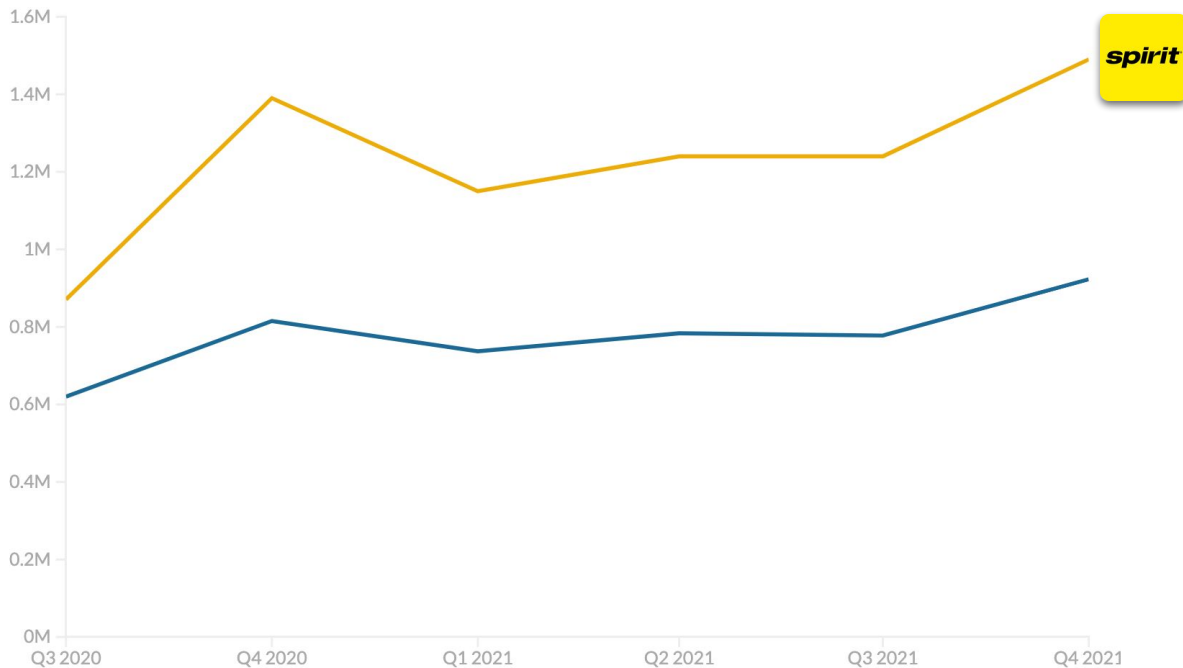
According to Apptopia's [SDK intelligence](#) Ryanair installed the VisionKit SDK for scanning COVID documents into the app. For delivering up-to-date travel information, it built a virtual travel assistant via the ReplayKit SDK that gave video updates up to 72 hours before departure.

Come fall and flu season, Ryanair's priorities shifted to support access to refund vouchers for cost difference between changed flights (the airline famously does not accept cancellations).

Spirit's growth soars above the market average for budget airlines

Downloads, U.S.

■ Budget airlines market average ■ Spirit



WHAT TO KNOW

Spirit rebounded quickly from the pandemic due to the increase in leisure travel. The airline had quite a growth year for its mobile app in 2021, which, according to Q4 21 earnings, correlated with its financial performance.

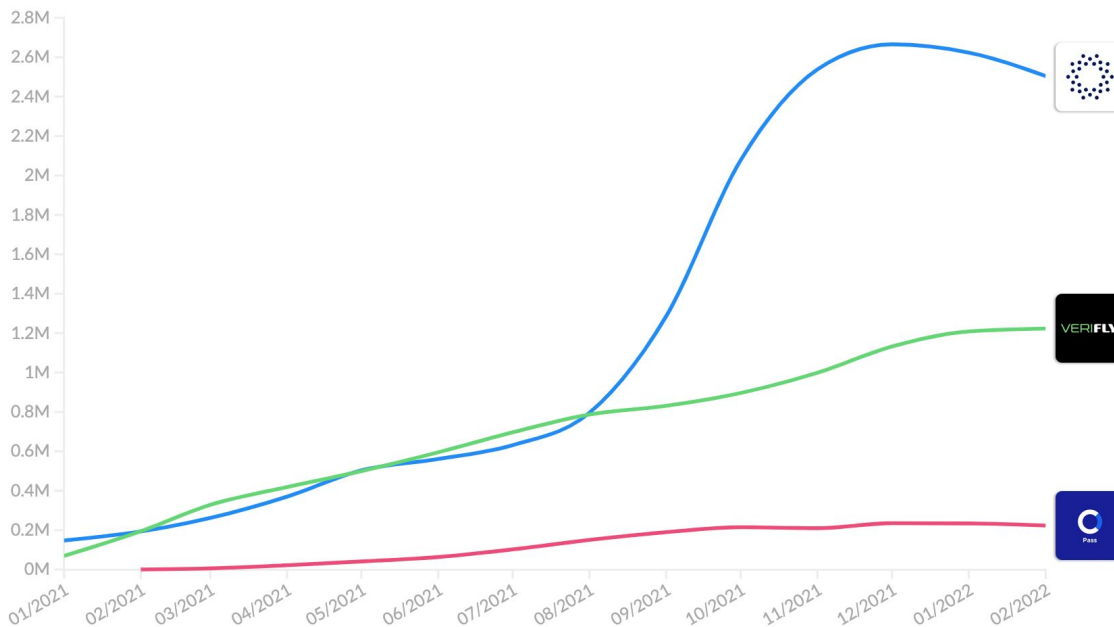
Spirit app downloads were above the market average for top budget airlines (Spirit, Frontier and Allegiant) in Q3 2020. Despite its own numbers pulling up the average, the difference between its downloads and the market average widened in 2021.

In fact, Spirit app downloads are closer to the totals for non-budget airlines and were equal to Southwest's in Q3 2021.

"Vaccine Passport" apps

Monthly active users, U.S.

■ CLEAR ■ VeriFLY ■ CommonPass

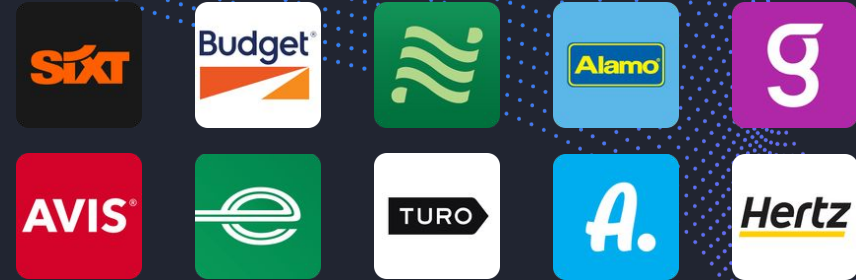


WHAT TO KNOW

Some locations and travel companies, mainly airlines, require(d) proof of vaccination and/or proof of a recent negative test result before traveling, which led to the growth of “vaccine passport” apps.

Verify has grown through partnerships with travel companies like British Airways, American Airlines, Carnival Cruise Line and Hyatt. Brands employ Verify to help organize and verify health documents associated with travel.

Clear was already operating prior to the pandemic as a program that enables members to quickly verify their identities at security kiosks. It added health document verification to its repertoire.



05

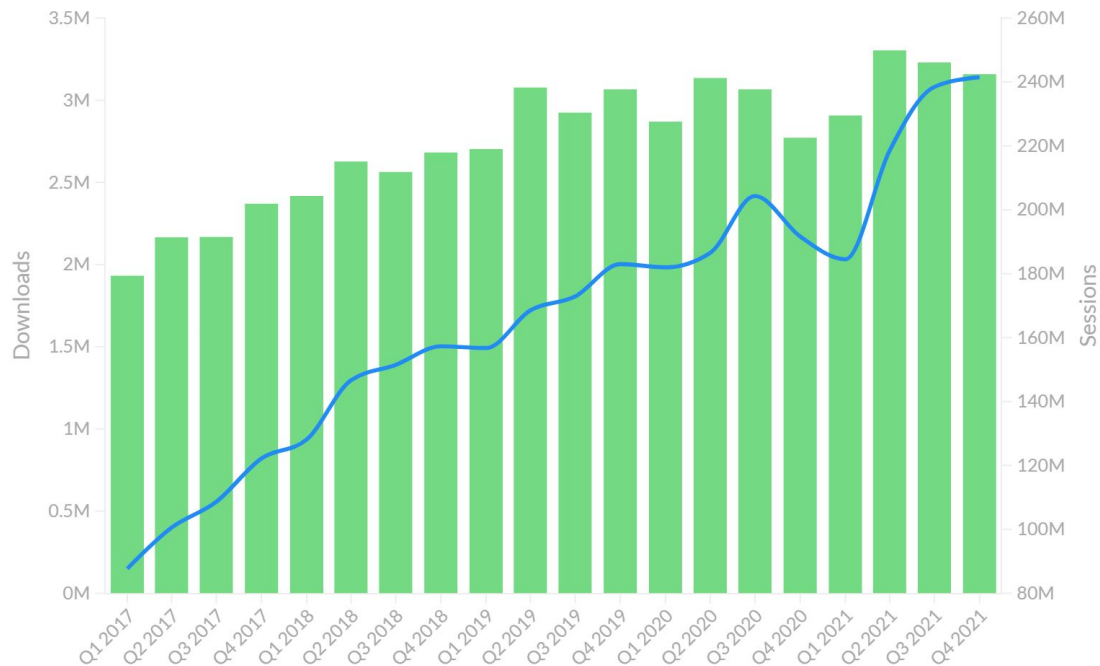
Car Rental

Apps used to browse, secure and manage vehicle rentals.

The top 10 rental car apps

Quarterly downloads and user sessions, U.S.

■ Sessions ■ Downloads



WHAT TO KNOW

User sessions of car rental apps hit an all-time high in Q4 2021 with 241.5 million. Numbers are continuing to climb every day in 2022 through February.

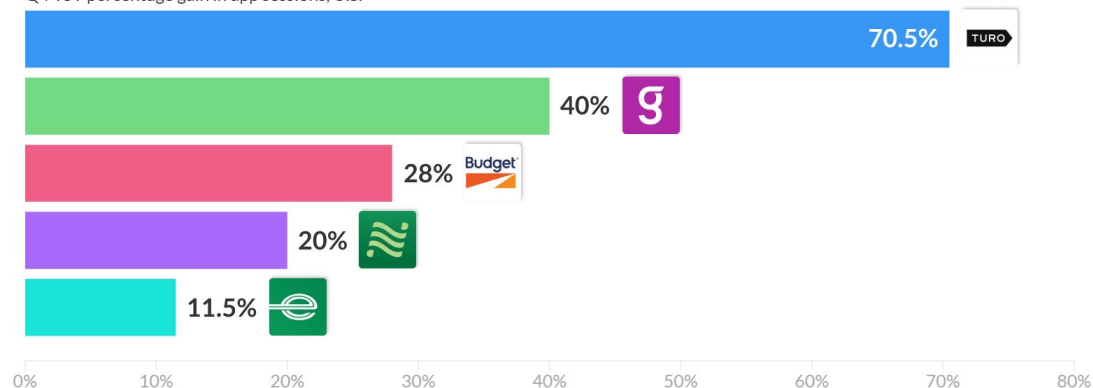
Rental car apps rebounded well in 2021 due to a number of factors such as business travel and vacation travel picking back up.

At the same time, car dealerships struggled with supply chain issues, causing more people to rent while they wait to purchase. Car transportation is also viewed as safer than public transportation these days due to risk of infection.

Fastest growing car rental apps

Turo Getaround Budget National Enterprise

Q4 YoY percentage gain in app sessions, U.S.



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WHAT TO KNOW

Both Turo and Getaround are growing faster than the traditional car rental players in this market.

These companies act as an Airbnb-style option for customers. They must attract both hosts and guests, but they do not need to buy or maintain inventory.

At the beginning of the pandemic, traditional car rental companies sold off inventory and then had trouble getting it back due to supply chain issues. Turo and Getaround benefited greatly from this.

Turo invests substantially more time/effort into its mobile app

App	Average number of days between updates
Turo	 6
Sixt	 16
Getaround	 18
Enterprise	 19
Avail	 24
Hertz	 27
Avis, Budget, Alamo	   30
National	 90

WHAT TO KNOW

Update cadence for an app is usually (not always) a good indication of both how well the app runs for users and the investment the company is making into mobile.

While National has a poor update cadence but was one of the fastest growing apps - I think it is more a situation of a 'rising tide' for them. Whereas Turo is far and above the fastest growing app and is far and above dedicating the most effort to squashing bugs and listening to customer feedback.

Outside of "Turo" and "rental," "first" is the #1 keyword used in its app reviews, and it's associated with a positive Impact Score. Impact Score is a weighted index Apptopia created to measure the effect a keyword has on Sentiment.

Reviewers are speaking positively about their first experience with the app, the company and their rental.



06

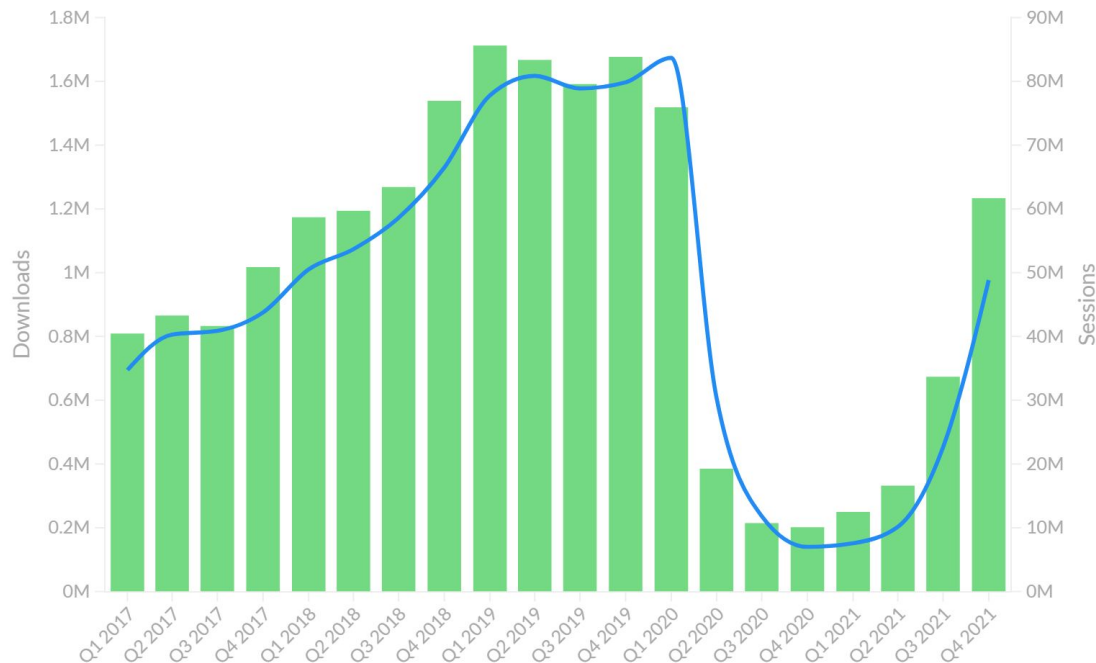
Cruise Lines

Apps published directly by cruise lines for the purpose of booking a cruise as well as a tool for guests once onboard.

The top 8 cruise line apps

Quarterly downloads and user sessions, U.S.

■ Sessions ■ Downloads



WHAT TO KNOW

This is an intense graph, displaying the massive hit the vacation cruising industry took due to the pandemic. The industry is not yet fully recovered to pre-pandemic times.

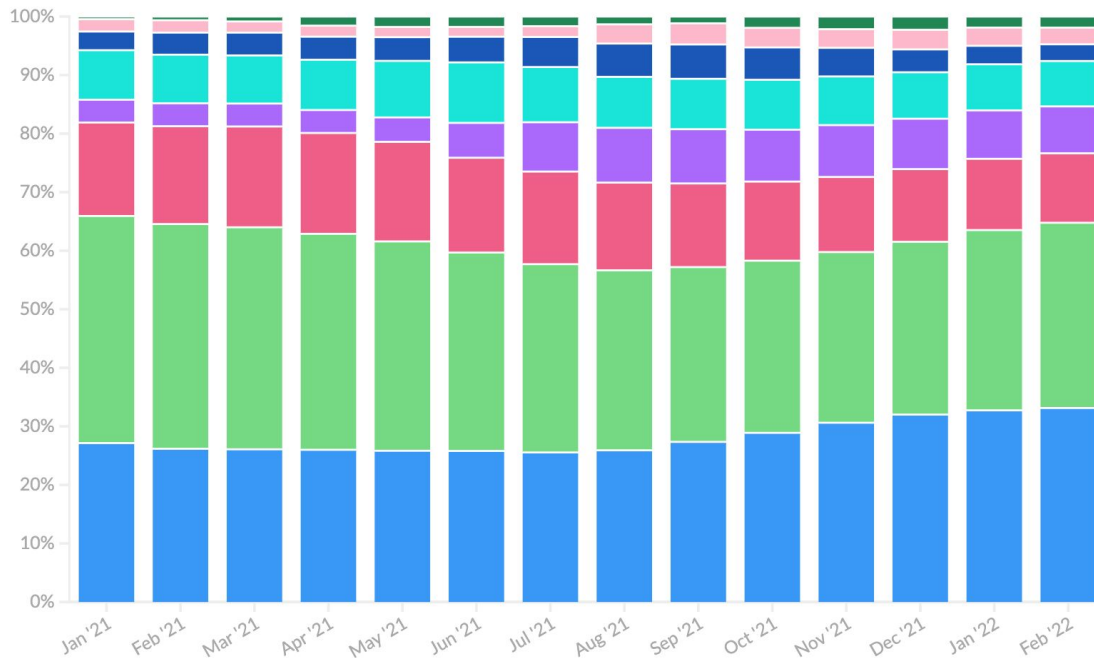
During the 2021 calendar year, cruise line apps were the fastest growing travel segment by user sessions within this report, at 545%.

Both Carnival and Royal Caribbean reported significantly higher passenger spend in Q4 2021.

Royal Caribbean takes over for Carnival as the market share leader

Market share by MAUs, U.S.

■ Royal Caribbean
 ■ Carnival
 ■ Norwegian
 ■ Celebrity
 ■ Disney
 ■ Viking
 ■ MSC
 ■ Virgin



WHAT TO KNOW

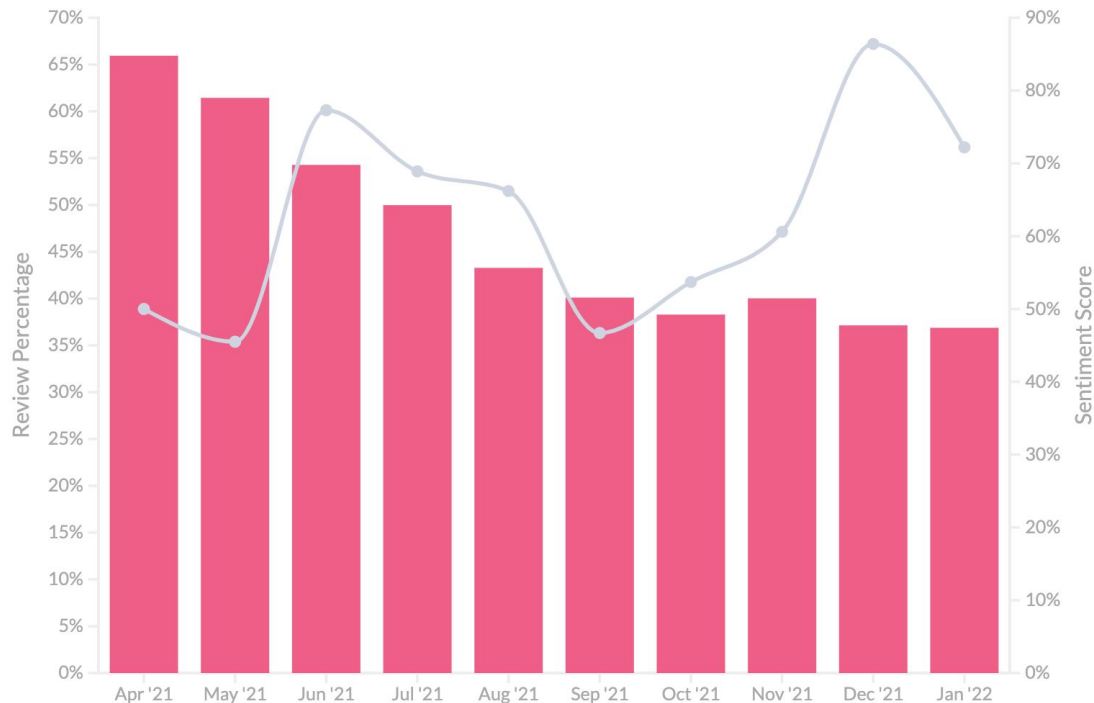
Looking at MAUs year-over-year in 1Q22, Virgin Voyages is the fastest growing app at 1,313%. It is also the newest (launched 2/26/20) and the one with the smallest share of the market at 1.9%.

All cruise line apps are growing strong YoY, including Celebrity Cruises (owned by Royal Caribbean) at 971%. Celebrity has also more than doubled its market share over the past year, growing from 3.8% to 8.1%.

Celebrity was the first cruise line granted CDC approval to start cruising in June 2021. Shortly after, it dropped its requirement for passengers to show proof of vaccination before boarding.

Virgin Voyages app reviews call out glitches and bugs

■ Percentage of reviews speaking to Performance & Bugs ■ Overall Sentiment Score



WHAT TO KNOW

Unfortunately for Virgin Voyages, it launched right as the pandemic set in. Because of this, it was not able to get much user feedback via [app reviews](#) until mid 2021, when it found out the app was very buggy. This caused its [Overall Sentiment](#) to tank.

On the flip side of this is Carnival, averaging a 91% Sentiment score over the past three months. Outside of “Carnival” and “cruise,” “chat” is the #1 keyword used in its app reviews, and it’s associated with a positive Impact Score. Impact Score is a weighted index Apptopia created to measure the effect a keyword has on Sentiment.

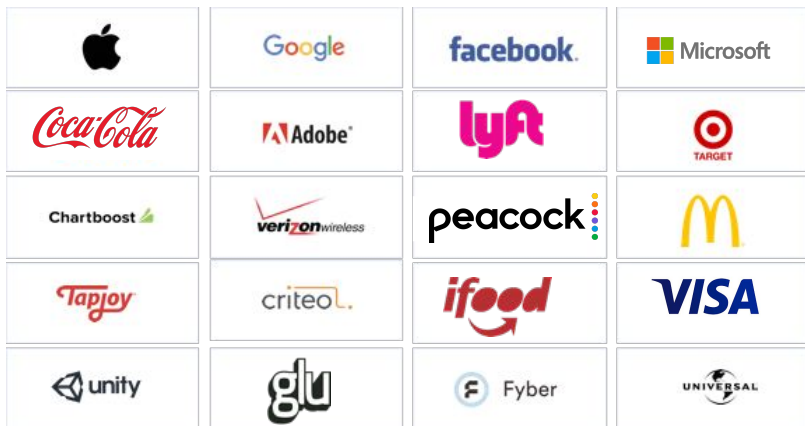
For an additional \$5, users can chat with the people in their contacts for the entirety of their cruise even without internet. This is a feature customers are clearly happy with.

Apptopia is the leader in real-time competitive intelligence

Industry Agnostic

Trusted by more than 100,000 publishers worldwide

We enable brands to analyze critical competitive signals across mobile apps & connected devices.



Data on over 7M+ apps

Coverage in over 60 countries

Data Points

- Downloads
- IAP Revenue
- Daily Active Users
- Monthly Active Users
- Avg. Sessions Per user
- Total # of Sessions
- Avg. Session Length
- Total Time Spent In App
- SDK installs/uninstalls
- Demographics
- Cross-app usage
- Feature tagging
- User reviews

Data Granularity

- App
- Store
- Day
- Country

Review Intelligence

Natural language processing extracts insights from over 1.5 billion user reviews

Performance intelligence on 7M+ Apps

Downloads, revenue, and usage estimates for over 7M+ apps

SDK Intelligence

SDK install/uninstall data on over 6M+ apps & over 2,900 SDKs identified

Actionable Insights

Audience Intelligence

Demographic insights on over 1.8M apps

Product Intelligence

Bone-deep product insights into every app and mobile game

Search Intelligence

ASO tools and insights to power keyword research and organic downloads

Our Data

Collect

Where does the data come from?

Combining the analytics dashboards for over 125K+ apps with our advanced models, we provide the most reliable estimated data for more than 7 million apps. Over the past 8 years, we have ethically sourced our data without relying on panel data, allowing us to provide the most accurate estimated mobile data without compromising our integrity.

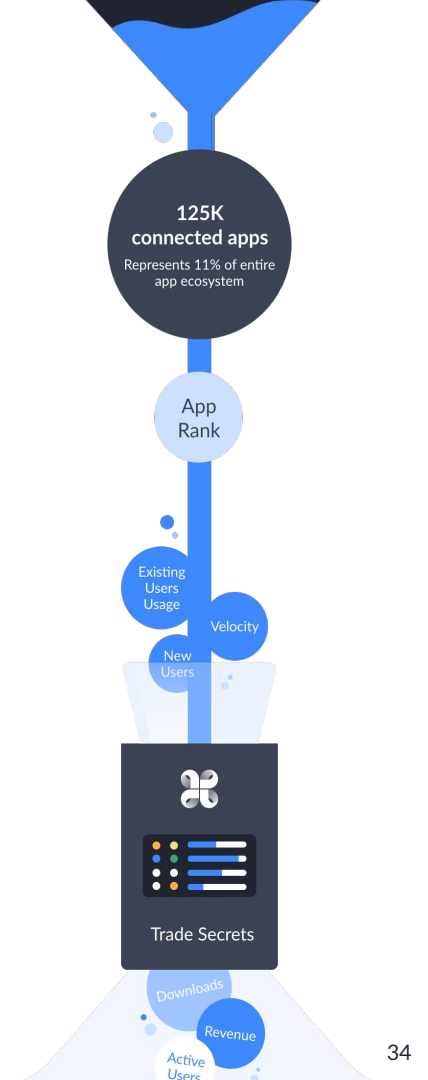
Transform

How is that turned into useful data?

An app's rank is derived from the velocity of new users and existing users' usage. By reverse engineering apple and google's ranking algorithms, we are able to get download, revenue, and usage data for every app in the world.

We also use Trade Secrets to derive usage signals from the metadata of an app such as category, ratings, reviews and release notes.

You can find more information on how we collect data and create our models here: [Part 1](#) and [Part 2](#). Visit our [compliance page here](#).





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Identify market opportunities & threats faster with data.

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