AIRBNB CASE STUDY

The Gap

Limitations

68.37% of Airbnb's new users utilize mobile web over app in the MENA region

✦ Lower user retention and engagement

✦ Less completed bookings

✦ Fewer monetization opportunities

Assumptions *Why do we need these users on the app?*

Users who download and use the app are **more likely** to complete bookings due to saved preferences and payment methods

App users tend to have **higher retention** due to push notifications, easier re-engagement, and personalized experiences

Growth loops are **more effectively** activated through the app

Assumptions *Why aren't these users on the app?*

High friction in the download funnel especially for MENA users due to storage constraints, data limits, and premature app prompts

New users who discover Airbnb through search engines **aren't aware** an app exists

The app doesn't offer clear advantages over mobile web for new users

Diagnostic Framework *How we'll find the gaps*

Web Funnel
External Analytics

- Traffic source (search, social, referral)
- App prompt timing and visibility
- Click-through vs. drop-off

Collaborating Teams
Growth, Marketing, Performance

App Funnel
Internal Analytics

- Post-install actions (searches, bookings, exits)
- Onboarding completion rates

**Collaborating Teams**
Product Analytics, Data Science

Qualitative Inputs

- App Store reviews (MENA)
- Community feedback (Reddit, forums, etc.)

Key Hypotheses

Area	Hypothesis
Awareness	Users enter via Google and don't know there's an app
Timing	App prompt shows up too early or feels intrusive
Friction	Users hesitate due to download size or data limits
Trust	App skepticism due to permissions or payment security
Value Gap	App doesn't offer benefits that web doesn't already have
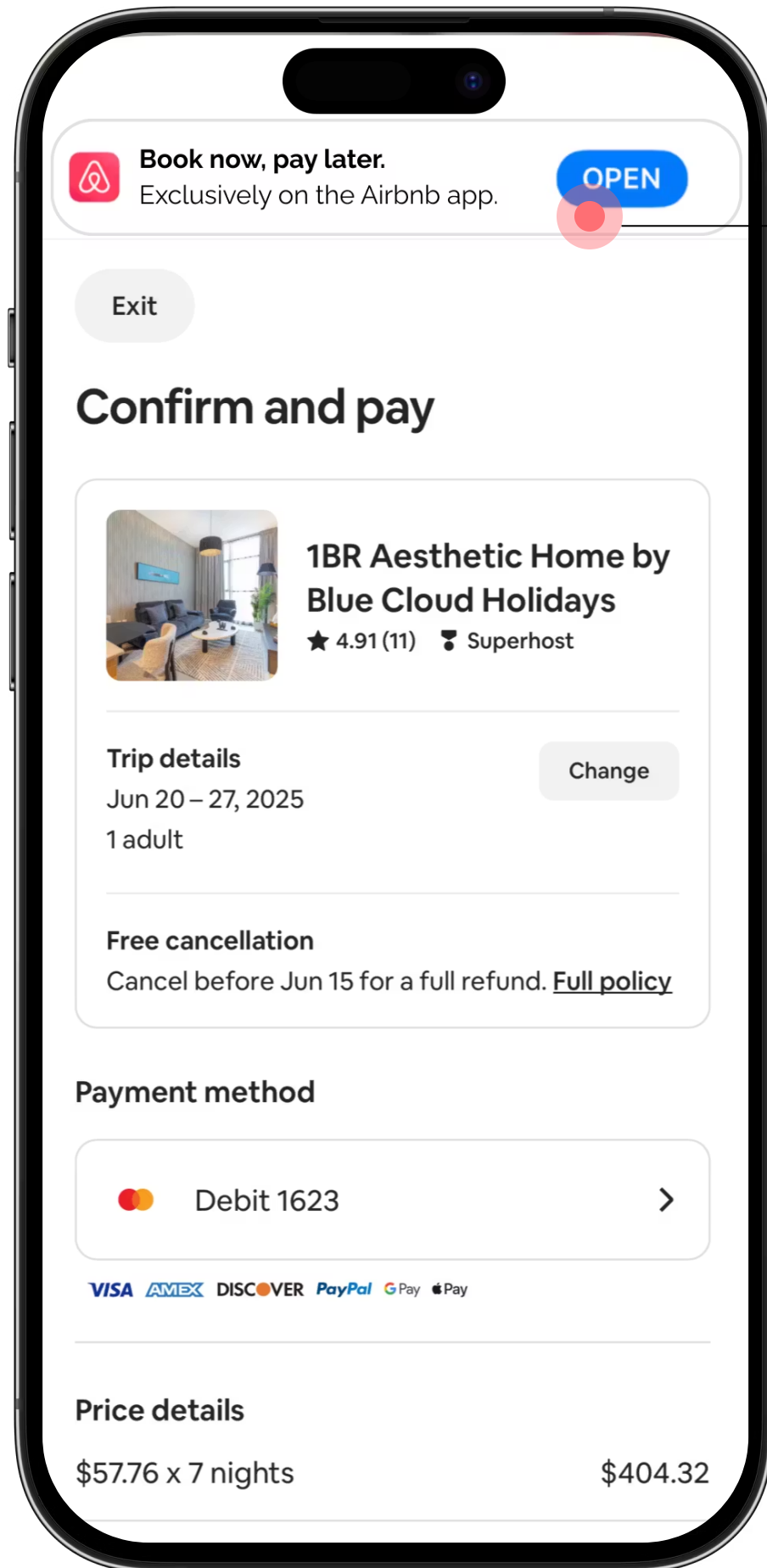
Feature Ideation

This feature is an example that combines all 3 levers

Strategy Overview

Funnel Optimization

- Smarter, delayed app banners
- Deep linking that preserves search state

Cultural & Market Fit

- Local BNPL (Tabby, Tamara) integration
- Local language support + UX nuances

Feature Differentiation

- Host-side mobile dashboard (exclusive to app)
- Guest-side app-only benefits (e.g., saved filters, price drop alerts)

Proposed MVPs & Experiments

MVP	Type	Goal	KPI
Delayed app banner	A/B Test	Improve install conversion	Install rate (vs. current)
BNPL integration	Pilot	Build trust, increase conversion	App booking conversion rate
Host dashboard (mobile)	Feature Rollout	Pull hosts into mobile ecosystem	Host DAU, usage analytics

Collaboration Plan

Regional Ops

Analyze web funnel, test banner designs

Growth and Marketing

Analyze drop-offs, app event behavior

Data Science

Implement deep linking, BNPL integration

Engineering

Validate payment habits, provide cultural input

Risk & Mitigation

Anticipating what might break

Risk	Mitigation
Deep link might not work consistently across devices	Test on most-used devices and browsers in MENA before full launch
BNPL rollout may be delayed due to external coordination	Start with a small test in one region and align cross-functionally
Users may not see enough value in downloading the app	Test messaging that highlights app-only benefits like faster checkout, price alerts, and local payment options

Success Metrics

Initial Success Targets
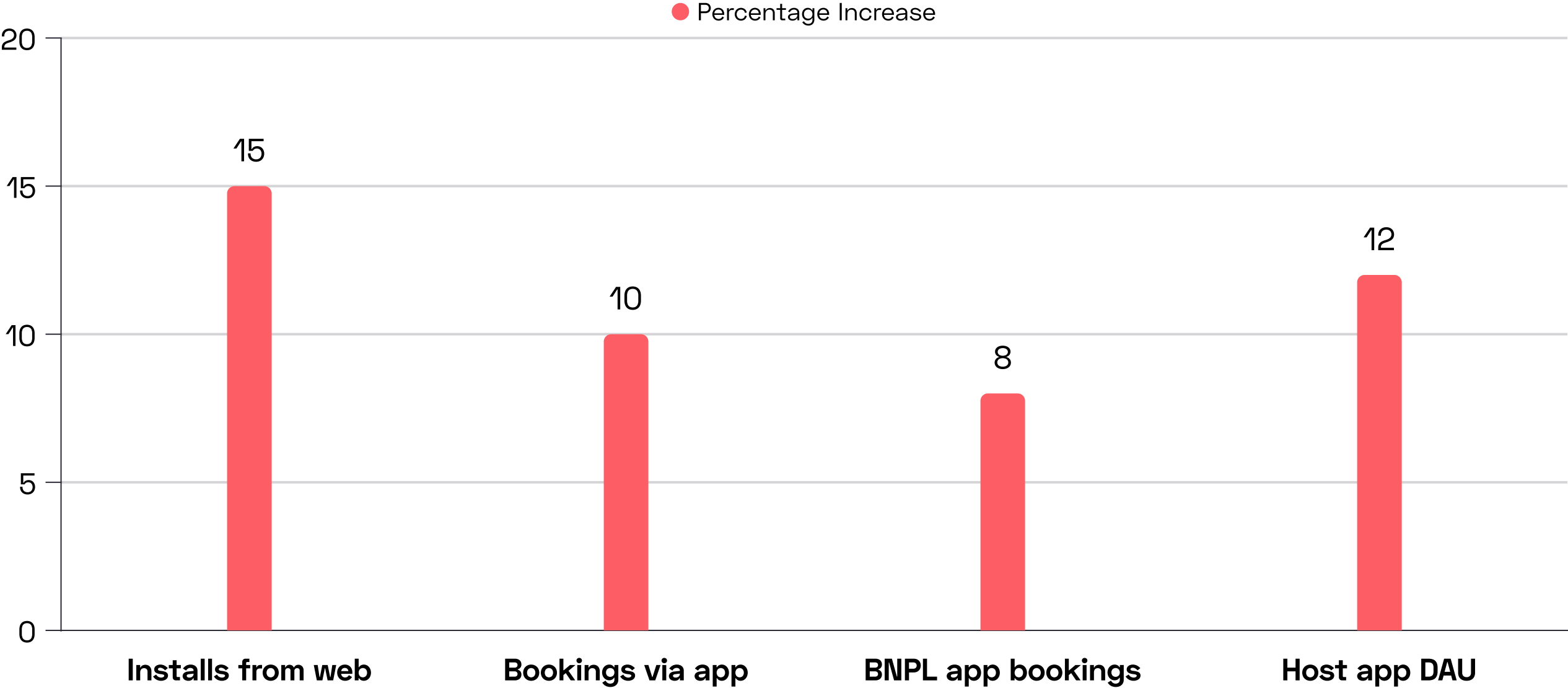
These metrics are directional and subject to refinement after internal data review

Questions to Investigate

1 What's the current install funnel CTR by country?

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2 How does onboarding completion compare to other markets?

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3 Is mobile app usage among MENA hosts trending upward or downward?

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4 What internal experiments (if any) have already been conducted on this funnel?

Timeline

6-Week Roadmap to Action

Funnel data review + stakeholder interviews

A/B testing of banners + internal usability testing

BNPL pilot + host dashboard v1 launch

Rollout + learn/iterate

Week 1-2

Week 3-4

Week 5-6

Week 7+