

# People Pilot\*

## Master Research Deck\*\*

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People Project, October 2019

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## Executive Summary

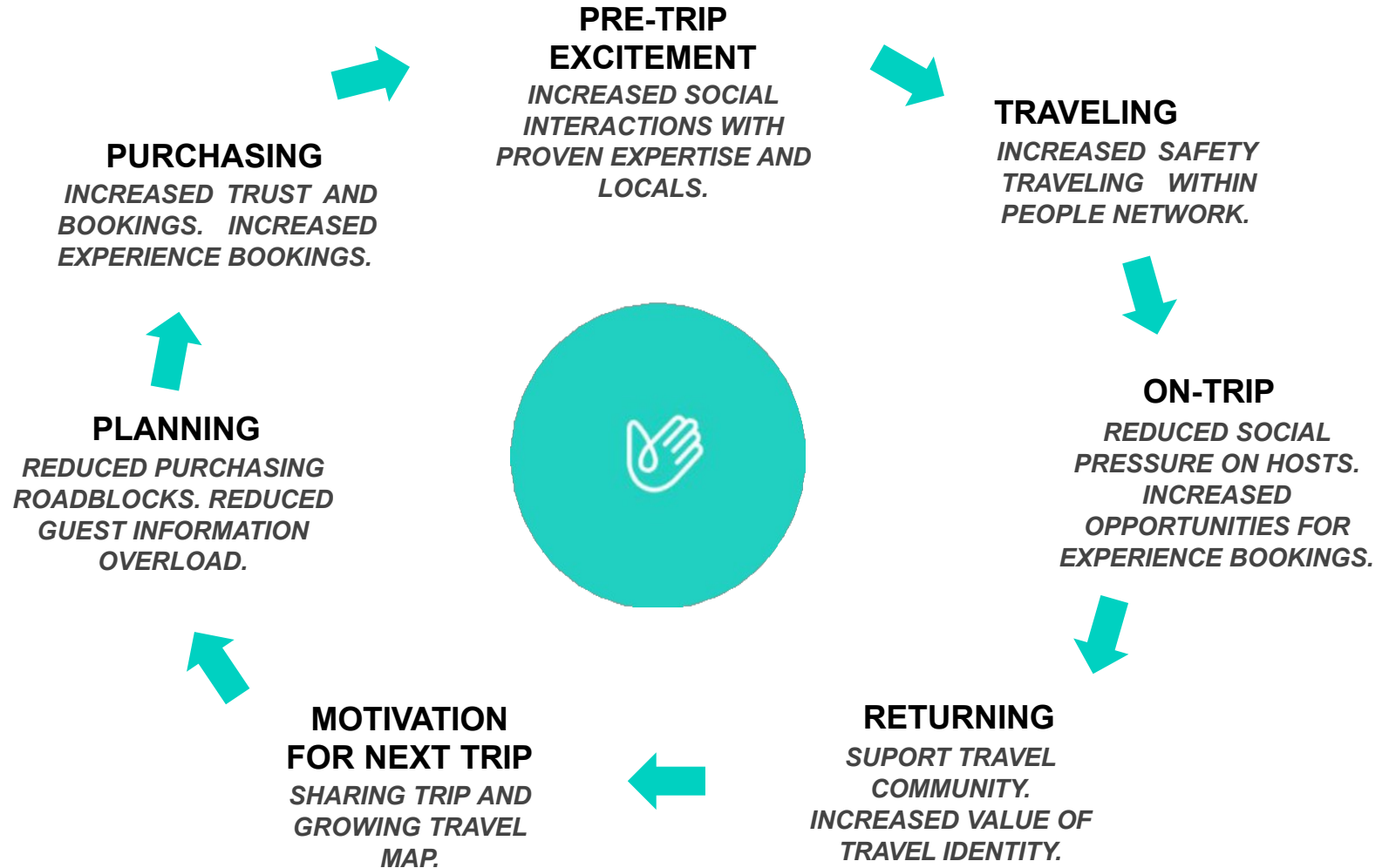
Findings from the People Pilot suggest that the **Airbnb People App can fulfill several marketplace gaps** and **provide solutions to existing Airbnb Guest problems**. In particular:

1. **People provides a safer space** for users across the globe to meet people online\*.
2. **People increases belonging** of meeting new people online by **widening the age demographic of users**.
3. **People removes existing roadblocks** for Airbnb Guest retention and Airbnb Guest acquisition when Guests desire to meet new people while they travel\*\*.
4. **People helps to transform Airbnb into a “go-to” source for ALL travelers needs.**



People not only helps Guests to meet like-minded travelers, but allows Airbnb to **support Guests at *every stage of the travel journey.***







If we do not support the ability to meet people while traveling, we risk **NEVER entering Guests' minds** during socially motivated trip Planning  
AND we risk *eliminating an entire market of socially motivated travelers.*



# Half of Airbnb Guests are **motivated to meet new people** as part of their travel journey.

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**37%**

Of Airbnb Guests are ***Really*** or  
***Extremely Motivated*** to  
meet new people while  
traveling.

n = 241 of 927  
survey responses

**23%**

Of Airbnb Guests are  
***Moderately Motivated*** to  
meet new people while  
traveling.

n = 217 of 927  
survey responses

But meeting people while staying in an  
Airbnb **isn't always easy.**

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**12%**

Think meeting new people is  
***difficult*** while staying in an  
Airbnb

n = 103 of 900  
survey responses

**14%**

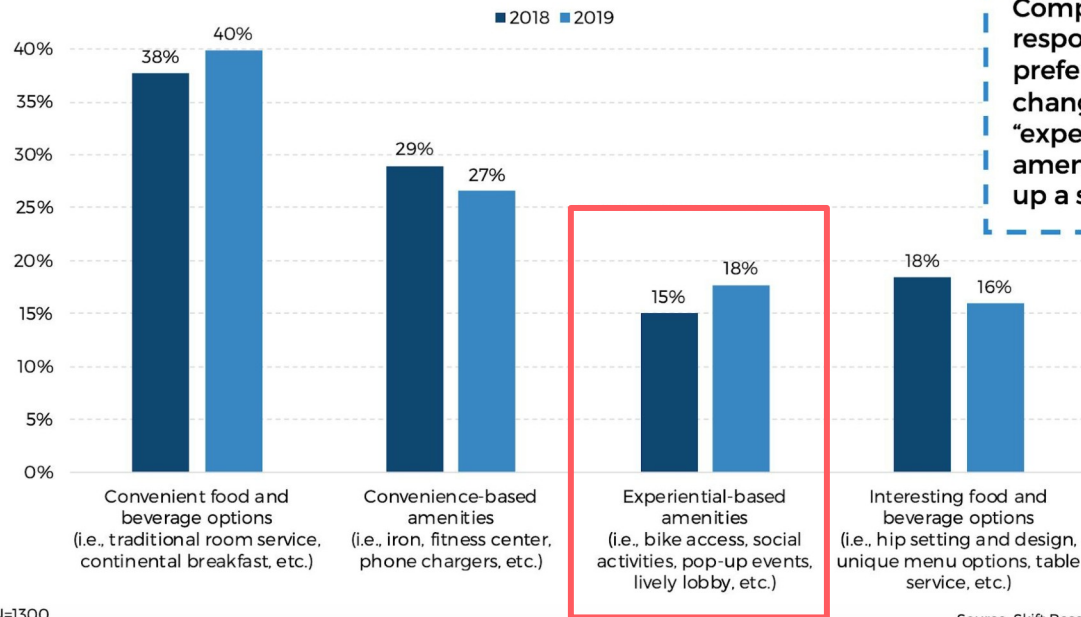
Have ***never*** met another  
person while staying in an  
Airbnb

n = 127 of 900  
survey responses

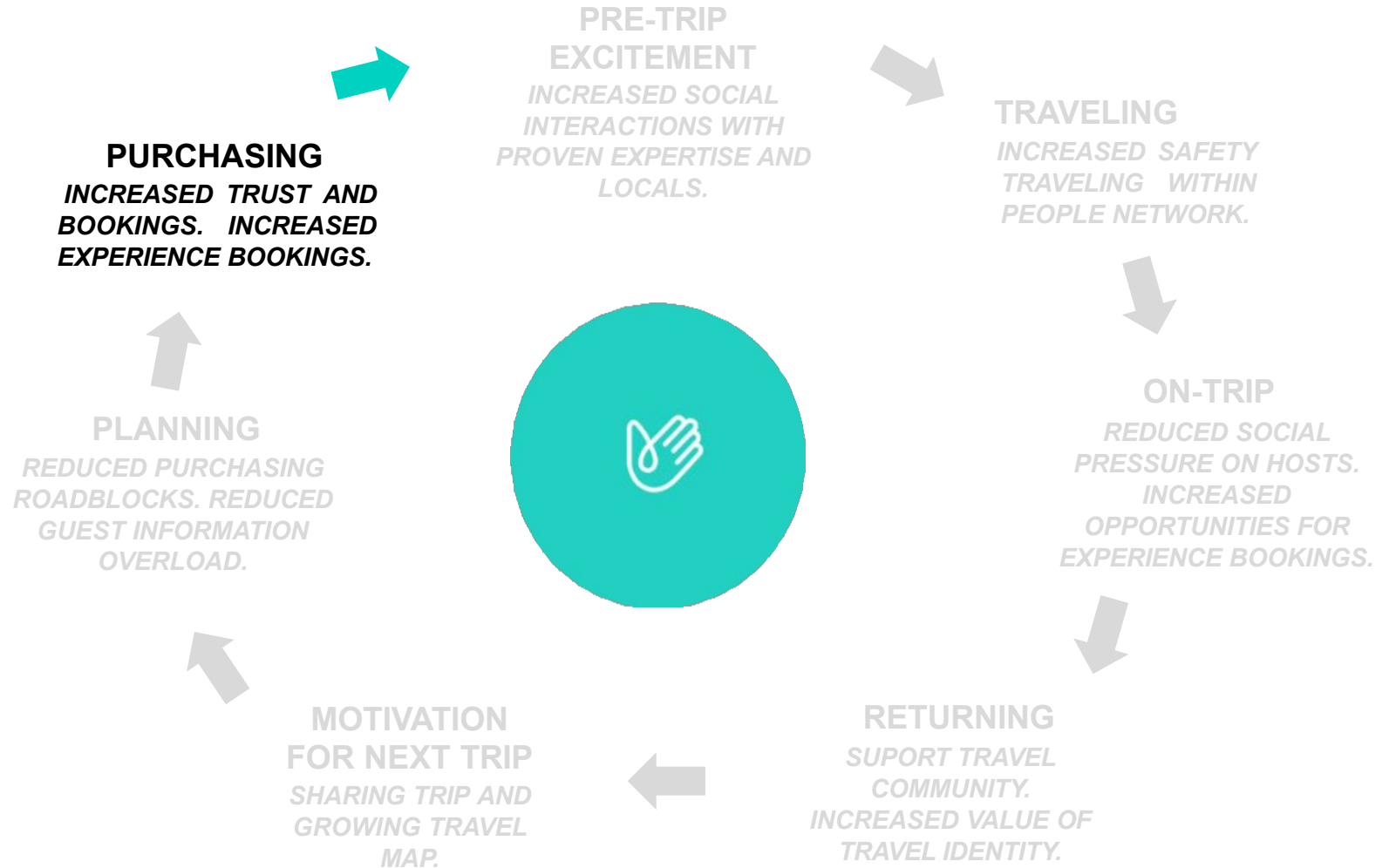


In addition to any difficulties meeting people with Airbnb, our competitors are experiencing *increased pressure* to boost experiential-based amenities and social connections, with 18% of travelers in a recent survey listing experiential-based amenities as THE most important part of their stay.

What is most important to you in terms of your actual hotel stay and experience?



Compared to 2018, respondents' hotel preferences haven't changed much, but "experiential-based amenities" have moved up a spot in importance.



By adding additional trust mechanisms (e.g., social trust) to the Airbnb ecosystem, we can **increase trust** for new Airbnb Hosts (thereby *increasing booking opportunities* for new listings) and **strengthen the existing trust and value of our Hosting community.**



We also ***risk forcing existing Airbnb Guests to CANCEL purchases*** if desires to meet new people while traveling are not met.

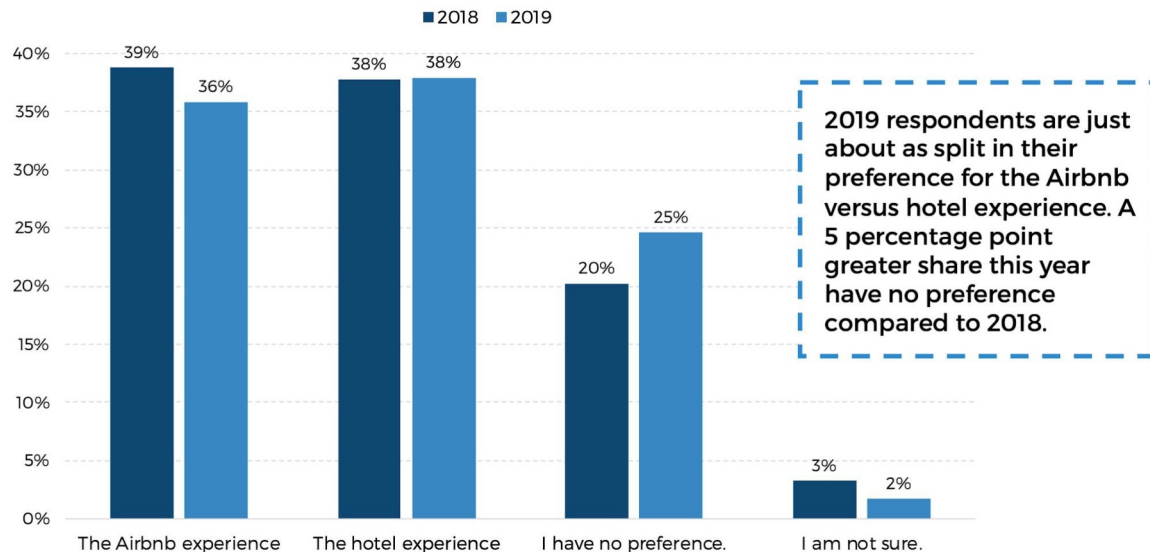


*“OF COURSE!!!!!! [there are differences being able to meet people while staying in Airbnb] /     / If I am interested in meeting new people when traveling, **I will stay in a hostel**. One     trip 8 months ago, **I downgraded my accommodations to a hostel** purposely in order to be able to meet new people.”*

*Airbnb Guest*

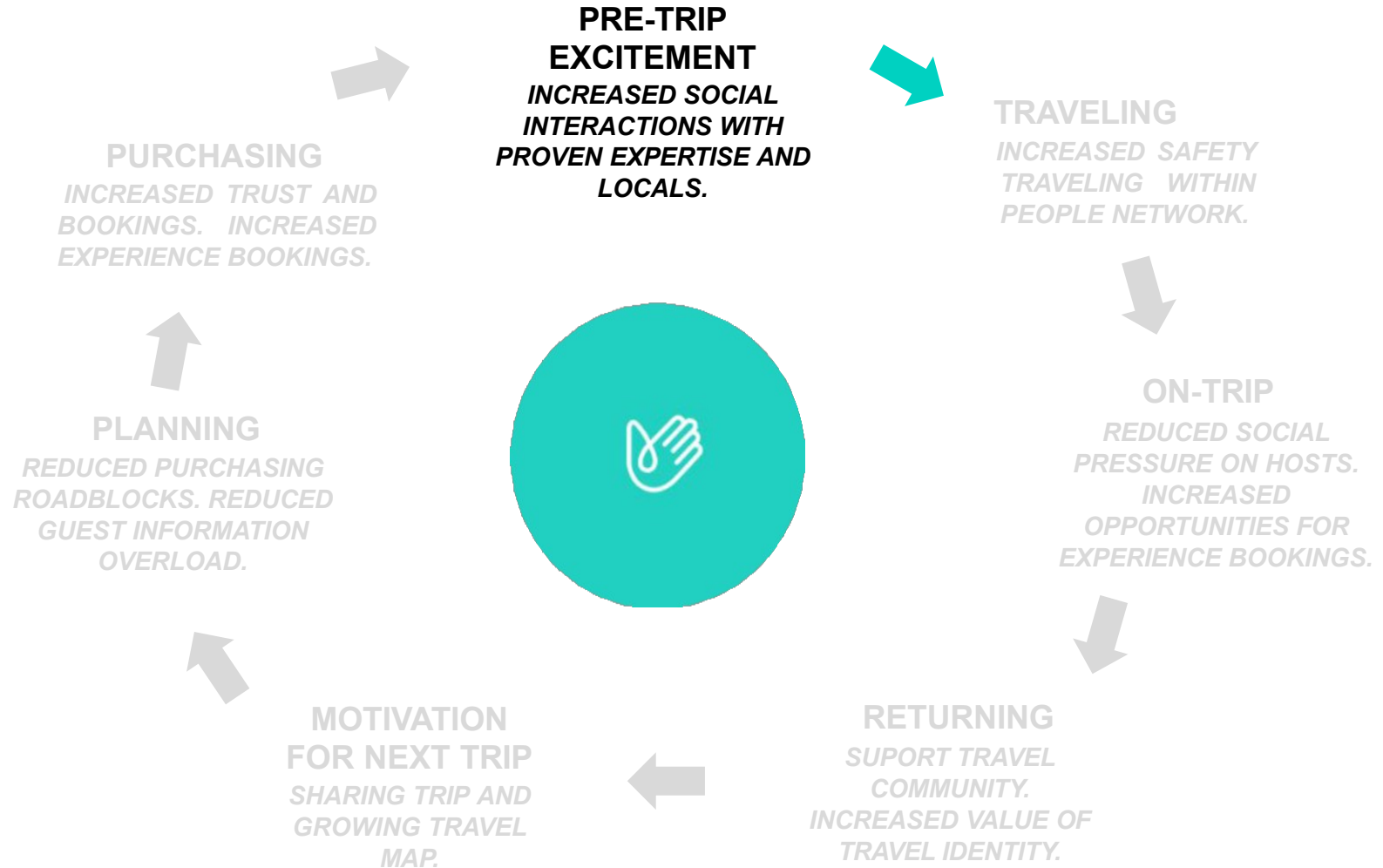
As price continues to be less of a differentiator when Guests are deciding between the hotel and Airbnb experience, the “experience” of belonging and community becomes paramount.

Overall, what type of accommodation experience do you prefer?



2018 N=400, 2019 N=533

Source: Skift Research, U.S. Experiential Traveler Survey 2019



Some Guests are already turning to other tools (e.g., Meetup, Facebook Groups, Couchsurfing, dating apps, etc.) to connect with people while traveling, but these applications are **not always effective\*** and in some cases, can require **user fees\*\***.





In addition to yearly fees, there is no way for Organizers OR Event attendees to **verify the identities of Meetup attendees.**

Opportunity to **add value** by removing fees (thereby empowering more users) and by supporting identity verification.

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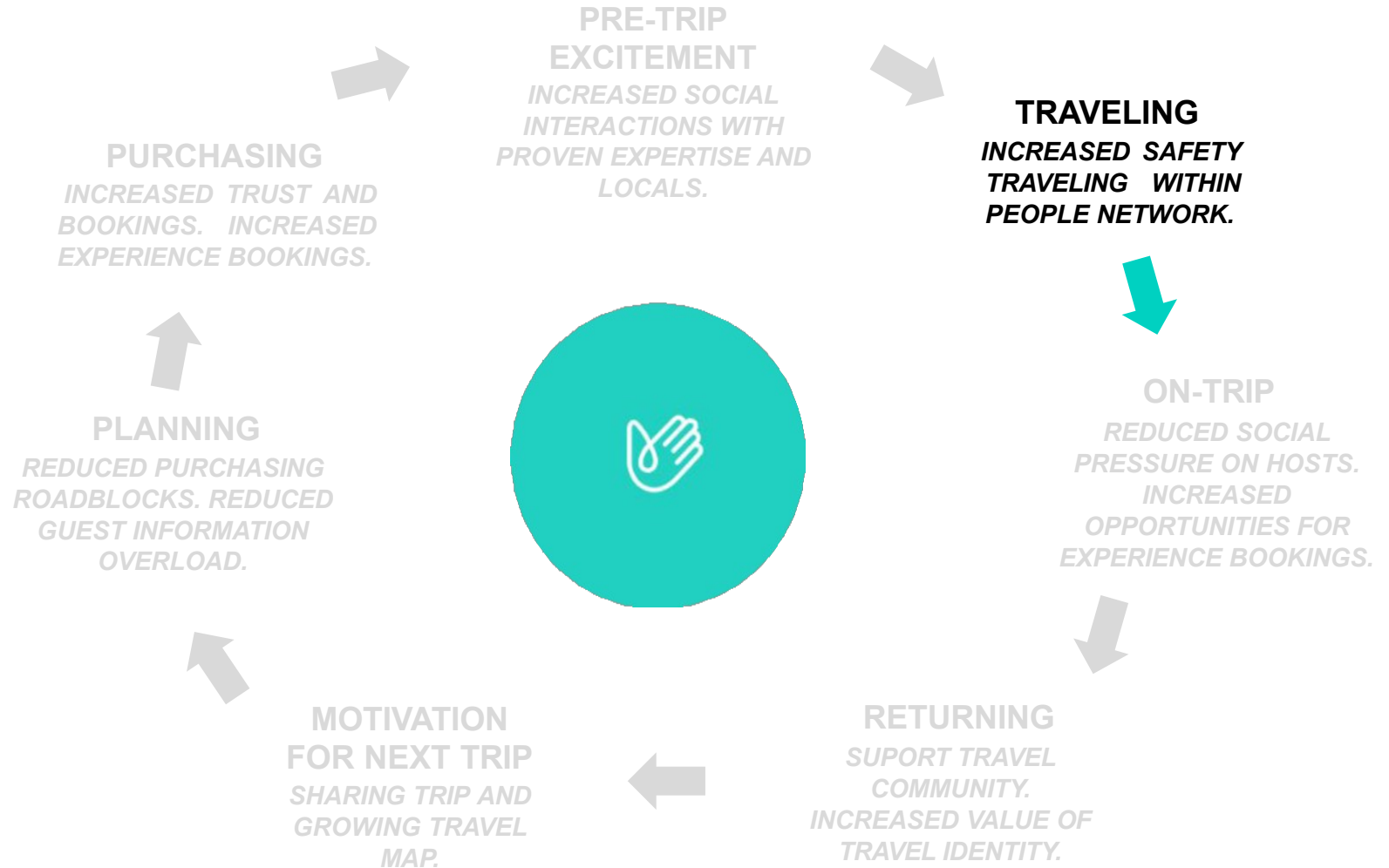
## Organizer subscription price breakdown

Choose between a one-month and a six-month billing cycle. Save more with a six-month subscription by paying upfront.

Location	Six-month subscription	Monthly subscription
Australia, the United Kingdom, Canada, and the United States	\$16.49 per month* (\$98.94 total)	\$23.99 per month*
All other countries	\$9.99 per month* (\$59.94 total)	\$14.99 per month*

\*Prices may vary based on your location, currency, and on subscriptions started through the Meetup app (iOS and Android). Taxes may apply.

SCREENSHOT MEETUP WEBSITE



*“I’m **concerned about the safety** of meeting strangers online. People only present the facts that they want others to see [and] **“weeding out” people can be time consuming.**”*

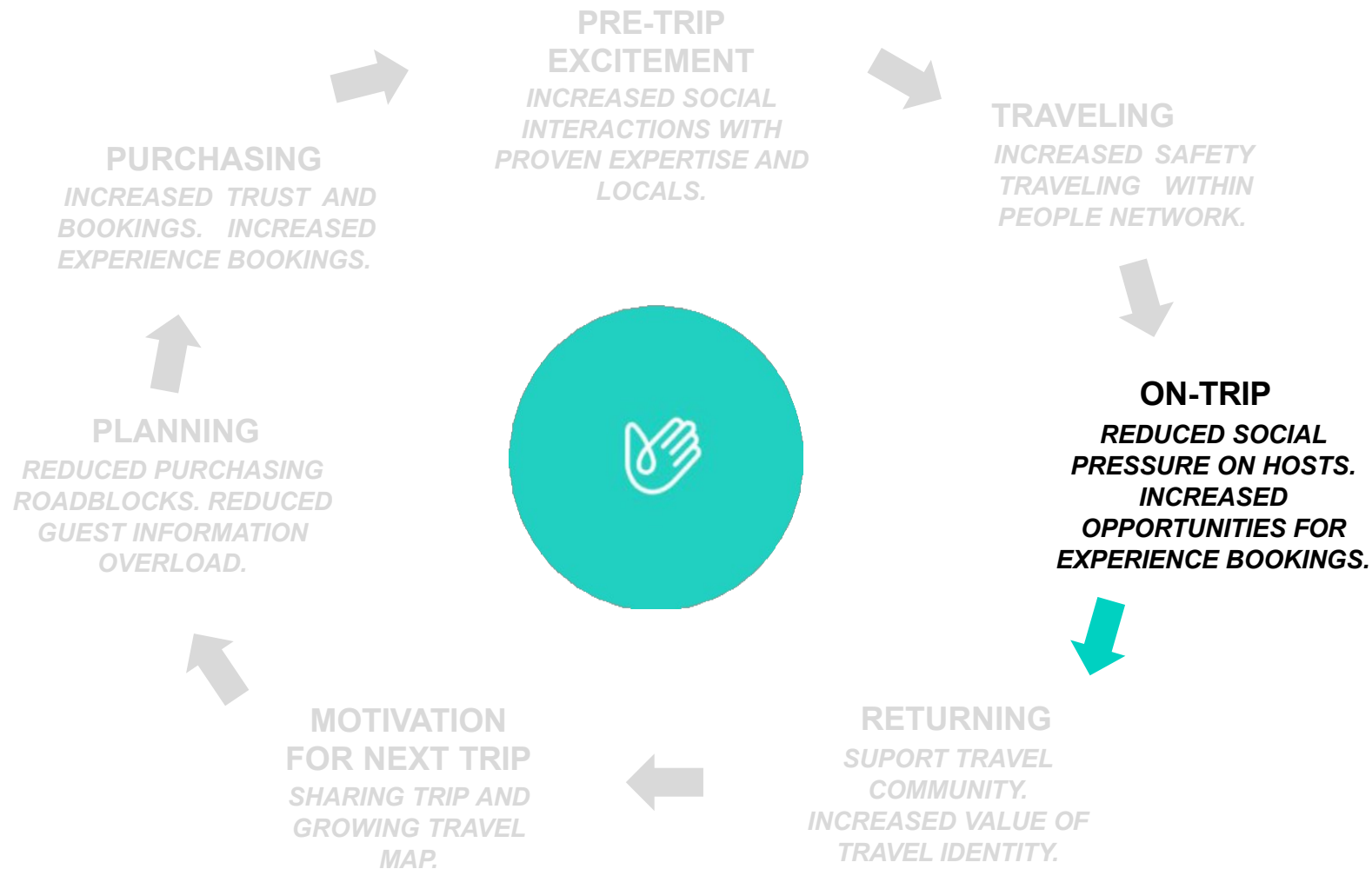
*Airbnb Guest*

Combining **Airbnb** user verification requirements with the **creation of People's travel map**, Airbnb can become the **first ever social media platform to *bridge the growing gap of trust between the physical and digital world***\*.



Opportunity to design and position People as **the most secure social networking application available.**





Hosts often **assume all of the pressure** to provide Guests with human connection, when travelers are simply motivated to **meet any new people** while traveling.

Some Guests are **turning to Experiences** to solve the human connection problem, but there is huge room for **improvement**.



Large opportunity to **aid older Airbnb Guests who feel left out** of existing applications designed to meet new people and/or **Guests who fear the age range of Experience users\*** by *widening opportunities for human connection across age groups.*



*“I’m shy. I also **worry** that I’m too old to use [ existing applications designed to meet people].”*

*Airbnb Guest*

*“People can say they are who they are not and that  
**makes me nervous. At my age of 58, I have too  
much to lose.**”*

*Airbnb Guest*

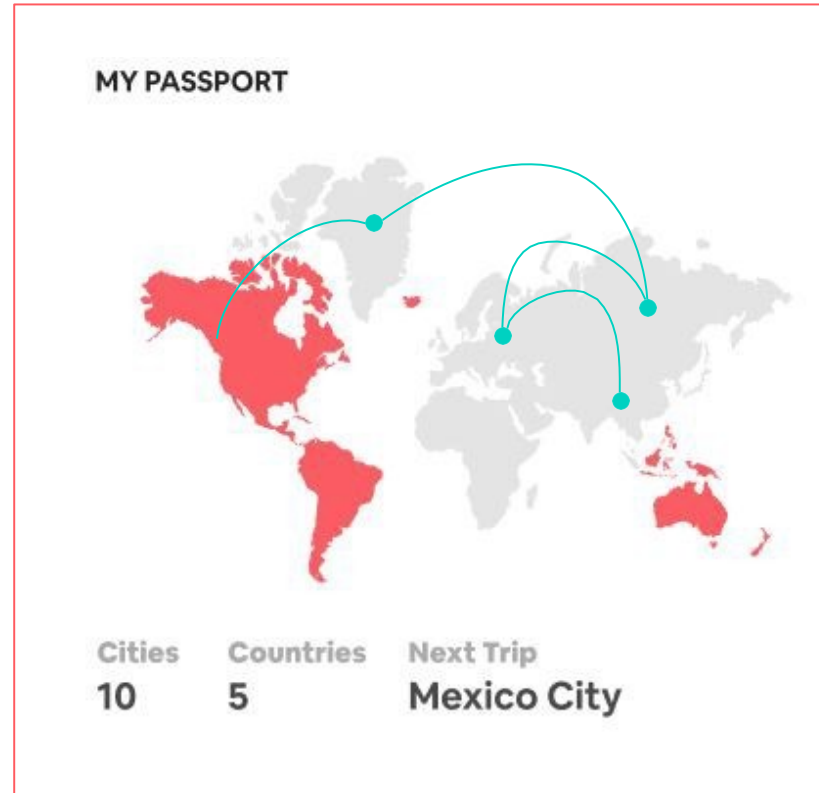


Opportunity to **support travel community** by enabling travelers to **sell, purchase, or donate items** used for their trip to other travelers nearby.





Grey areas on travel map can be used to help answer the often difficult question of:  
**Where should I go next?**



The **need for human connection** also extends far past traveling.





**Huge opportunity to make a positive global impact and to support our community worldwide.**



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*As a society, we have built stronger wifi connections over time, but our personal connections have deteriorated...*

*Loneliness is a growing health epidemic...  
[and we should] make fostering social connections a strategic priority.*

**Former United States Surgeon General**




[LINK TO PEOPLE PROJECT DECK: CALEY KEVLIN](#)

# Reactions from the People Pilot

*October 2019*



*“Overall this looks so freaking cool! I’m so **excited** to meet  
**people in my next trip!** Very good stuff! ”* 

*Airbnb Employee*

*“I love the 'profile' interface and the 'my passport' sections -- I think the **design is sleek and is representative of our brand**, and I **am excited to experience a future iteration of the app!***

*The 'my passport' feature is a nice snapshot that can be used to **show others more opportunities to connect** based on previous travel experiences.”*

*Airbnb Employee*

Over time, the **presence of bugs** in the pilot contributed to ***reduced user engagement\**** and ***reduced desire*** to continuing using People.



HOWEVER

**63% of exit survey respondents reported **more comfortability** messaging strangers on People**  
than on *any existing applications* designed to meet new  
people.





Pilot data also outlined **future design improvements** (e.g., increasing education, improving value propositions, increasing clarity regarding data privacy, etc.) in order to design ***the most secure social networking application to support all traveler needs.***



**Huge opportunity to add value** in this space  
and to **secure Airbnb as a “go-to” travel platform.**



# APPENDIX

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*Design Related Insights*

## ***Executive Summary of Past Interview Insights***

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Being in good company can elevate any experience.

Sharing a connection with another person can elevate the experience we call life.

But, **meeting people *isn't easy***.

Problems with existing applications include: the ***confusing nature of existing applications***, the often ***hyper focus on dating***, and the ***lack of successful connections*** in relation to the time required to meet someone.

20% of past app users have also ***never tried using an application while traveling***. However, people who *have used* apps to meet other travelers report experiencing lifelong meaningful connections.

**Huge opportunity to facilitate successful human connections all over the world.**

# Summary of Interview Insights

## How many people have used existing applications to meet new people?

Majority of survey responses (67%) reported some experience using any application(s) to meet new people. However, *only 23% of application users reported being active* within the past week.

## What can influence application use?

Reductions in usage were associated with *lack of time*, *lack of motivation* to meet new people (e.g., have established friend group in local city, traveling with other people who are not interested in meeting new people, etc.), and/or *lack of positive connections* with application(s) used.

In addition to lack of time, lack of motivation, and/or lack of positive connections, *lack of awareness*, *assumptions that all applications are for dating only*, and/or *lack of trust or faith in applications* designed to meet people can also *prevent users* from ever trying an application to meet new people.

When users have tried to use apps to find friends (e.g., Bumble, Meetup, etc.) the *process wasn't always described as easy* - upcoming usability and feedback sessions will be used to support ease of use here.

Lastly, there also exists a marketplace gap for applications to aid underlying motivations to meet new people while traveling. In particular, by providing *access to* and *awareness of* easy to use applications while traveling.

# Summary of Interview Insights Cont.

## **What can we learn from the experience of meeting new people?**

Meeting new people can be anxiety provoking. There is no perfect roadmap for predicting when two people will have a meaningful connection together. Shared interests and/or common ground can build confidence that there will be things to talk about and/or confidence that interacting with a stranger will be positive BUT meaningful and LASTING interactions can be unpredictable. The more experience someone has meeting new people in-person versus meeting new people via applications the more their metrics used to assess potential positive connections can change over time.

In-person, meeting new people often includes valuable non-verbal cues and opportunities for more nuance in communication (e.g., communicating sarcasm, showing emotion, etc.).

Online, meeting new people often includes more immediate informational cues (e.g., similar interests, hometown, relationship status, etc.) but there is no guarantee that a positive online connection will transfer to a positive in-person connection with the same person.

The amount of time it takes to assess if someone wants to continue talking to someone and/or the process of deciding IF they want to talk to someone varies person-to-person AND varies between in-person versus online environments.

# Summary of Interview Insights Cont.

## What do people dislike about applications?

Profile pictures that don't include a person's face were associated with the highest level of negative sentiment. Inability to know what you're truly signing yourself up for with group meetup applications (e.g., unclear who will be attending the event).

## What are people excited about moving forward?

Matching on shared interests, shared sense of humor, shared "vibes," shared values, and/or shared common ground was valued. In particular, *exploring new and unique ways to assess difficult metrics* like "sense of humor" and "vibes."

*Solo travelers* see a great use case for this application as well as *group travelers with similar travel goals* to other People users.

When users *have been* able to easily use any travel application(s) to make connections, connections made were sometimes described as life-long, meaningful, and life-changing.

*Huge opportunity to facilitate meaningful connections all over the world.*

## ***Executive Summary of Past Usability Insights***

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**Algorithmic matching** could benefit from *more randomization* and *added context* on matching categories (e.g., situation where *almost every* match is identical - “[name] also likes Japanese. Say hi!” and “Japanese” alone is unclear that this is referring to food preferences).

**Visual cues** *could be enhanced* throughout (e.g., switching color signifiers when possible, clarifying possible actions, etc.).

**Language modifications** could be used to enhance comprehension throughout (e.g., added information in on-boarding process, clarifying use of notifications, etc.).

**Current design and placement of matching-questions** could *hinder matching potential* (previous multiple choice questions have been converted to open-ended responses, placement of questions during first-time login have been converted to end of People rather than during on-boarding, inability to answer more than one question per session).

Reinstating multiple choice where appropriate, transferring set of matching questions to on-boarding, and enabling the ability to answer multiple questions at a time can *improve matching possibilities*.