

A Behavioral Study of Chinese Travelers

Project
FEIYU
for
airbnb

2015.06.25

Before:



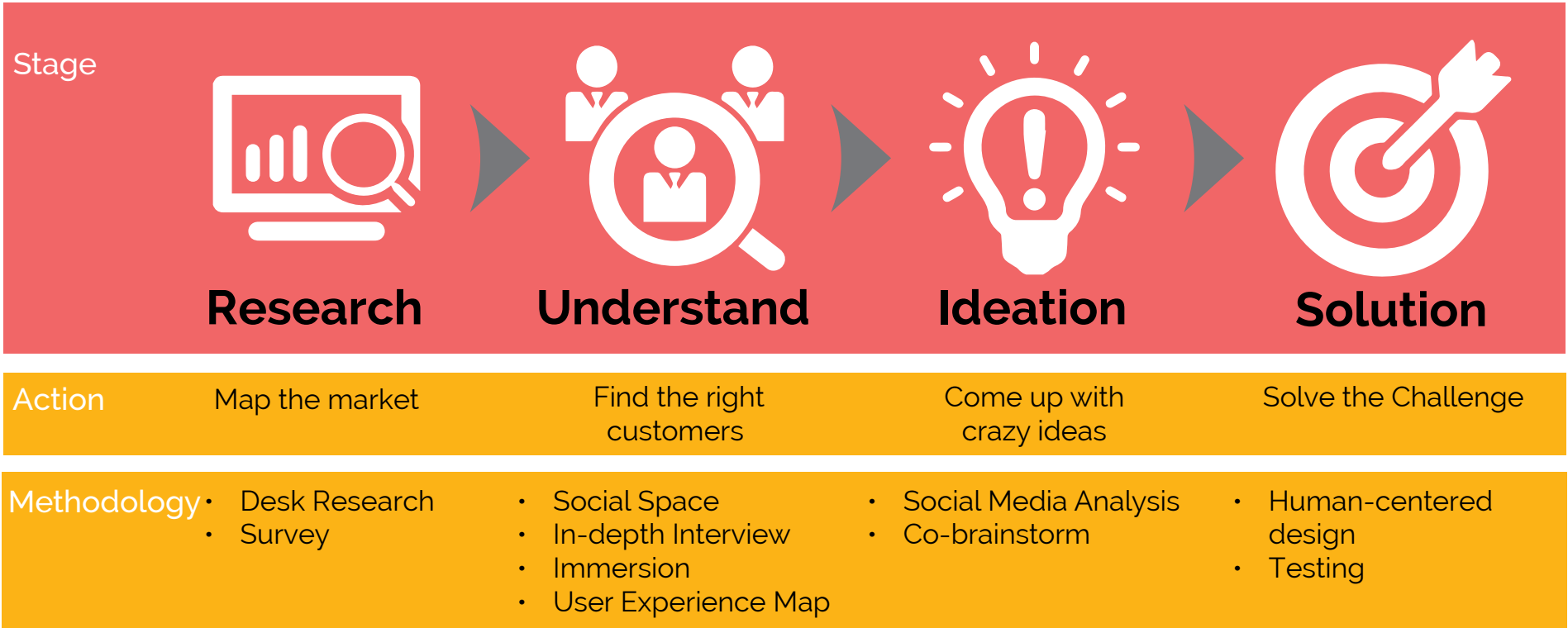
After:



我的旅行力

airbnb

1. Process



2. Research

Focus group: Independent travelers

Pre-trip



Purpose of traveling

- 51% Leisure
- 24% Broaden their horizons and explore themselves
- 18% Experience a different culture

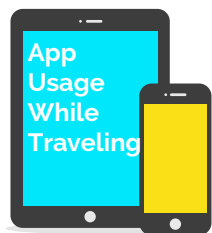
What affects the decision of where to stay

- 39% Location
- 26% Price
- 11% Pictures
- 9% Cost effectiveness
- 7% Reviews



How to search a place to stay

- 56% Hotel booking sites (ctrip etc.)
- 19% Search Keywords that are related to the destination
- 7% Always stay at familiar hotel brand
- 7% Online journals



67%
ctrip
携程

43%
dianping
大众点评

36%
tuniu
途牛

30%
Autonavi
高德地图

23%
elong
艺龙旅行

16%
mafeng-wo
蚂蜂窝

13%
quer
穷游网

10%
veryzhun
飞常准

7%
breadtrip
面包旅行

5%
Lyft

2%
airbnb

53%
qunar
去哪儿

36%
Baidu
Map
百度地图

30%
Didi
滴滴打车

29%
Meituan
美团

16%
Yelp

16%
Ivmama
驴妈妈旅游

10%
xiuxiu
美图秀秀

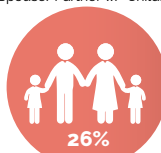
9%
Google
map
谷歌地图

5%
Uber

4%
chanyouji
蝉游记

On the trip

Spouse/Partner w/ Children



Family Members



Alone



Traveling Companions

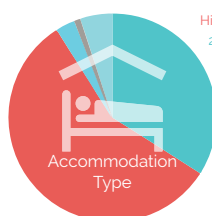


Couples



Friends

High-end hotels 57%
2/3-star hotels 34%
Local Rental 5%
Couchsurf 1%
Hostel 3%



Accommodation Type

Over 50%

of Chinese independent outbound travelers choose high-end hotels while traveling

Post-trip



What do they do after returning to their living place?



- Share the trip on social media
- Reflect on the trip and rest
- Write journals or share tips
- Write reviews of accommodation
- Connect with people met during the trip



Over 65%

of Chinese independent outbound travelers will share their traveling experience online

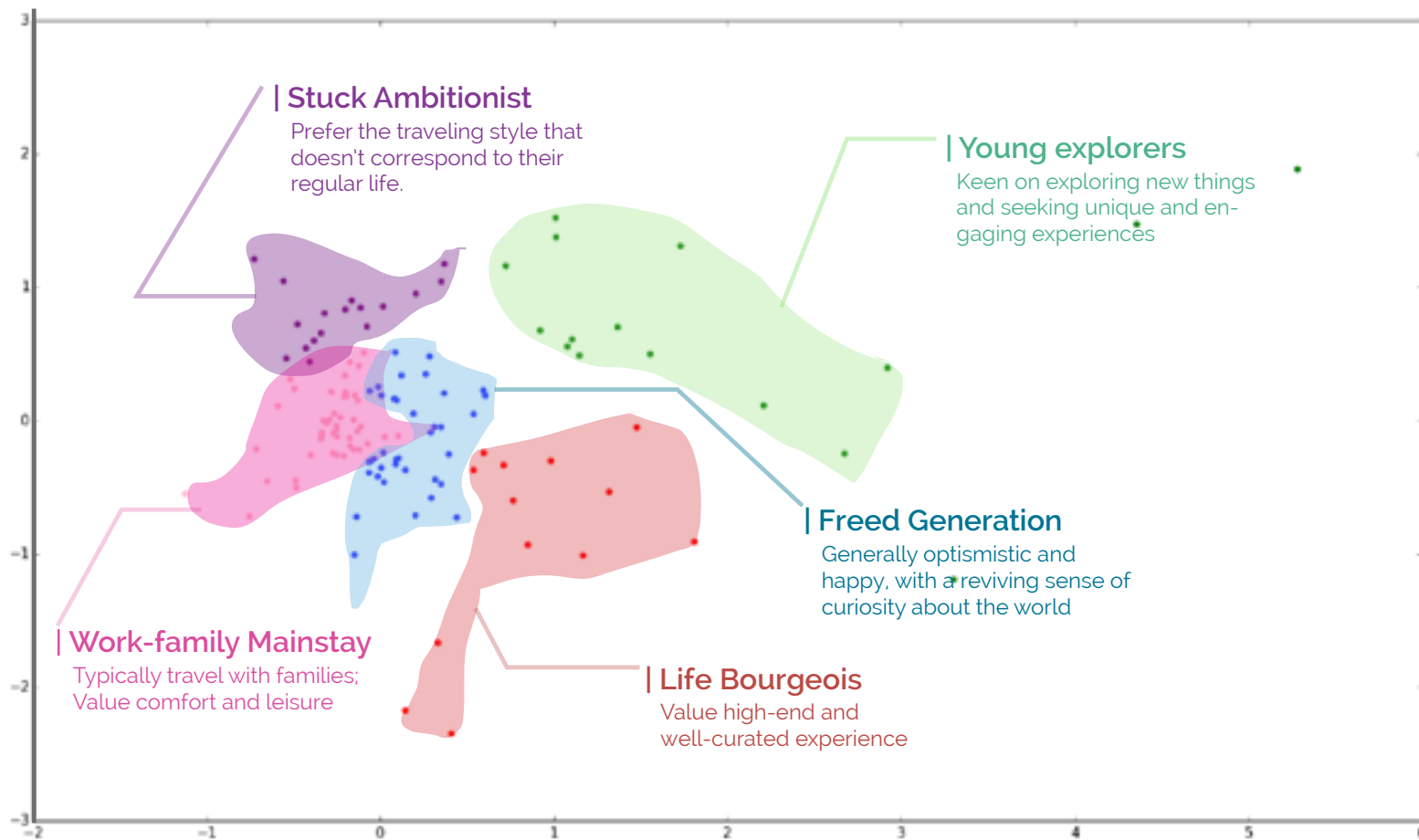
3. Understand

Cluster

Interpretation

Target

Identify groups that have similar lifestyles, attitudes, and travelling behaviors, which will lead to their decisions to choose similar places to stay when traveling.



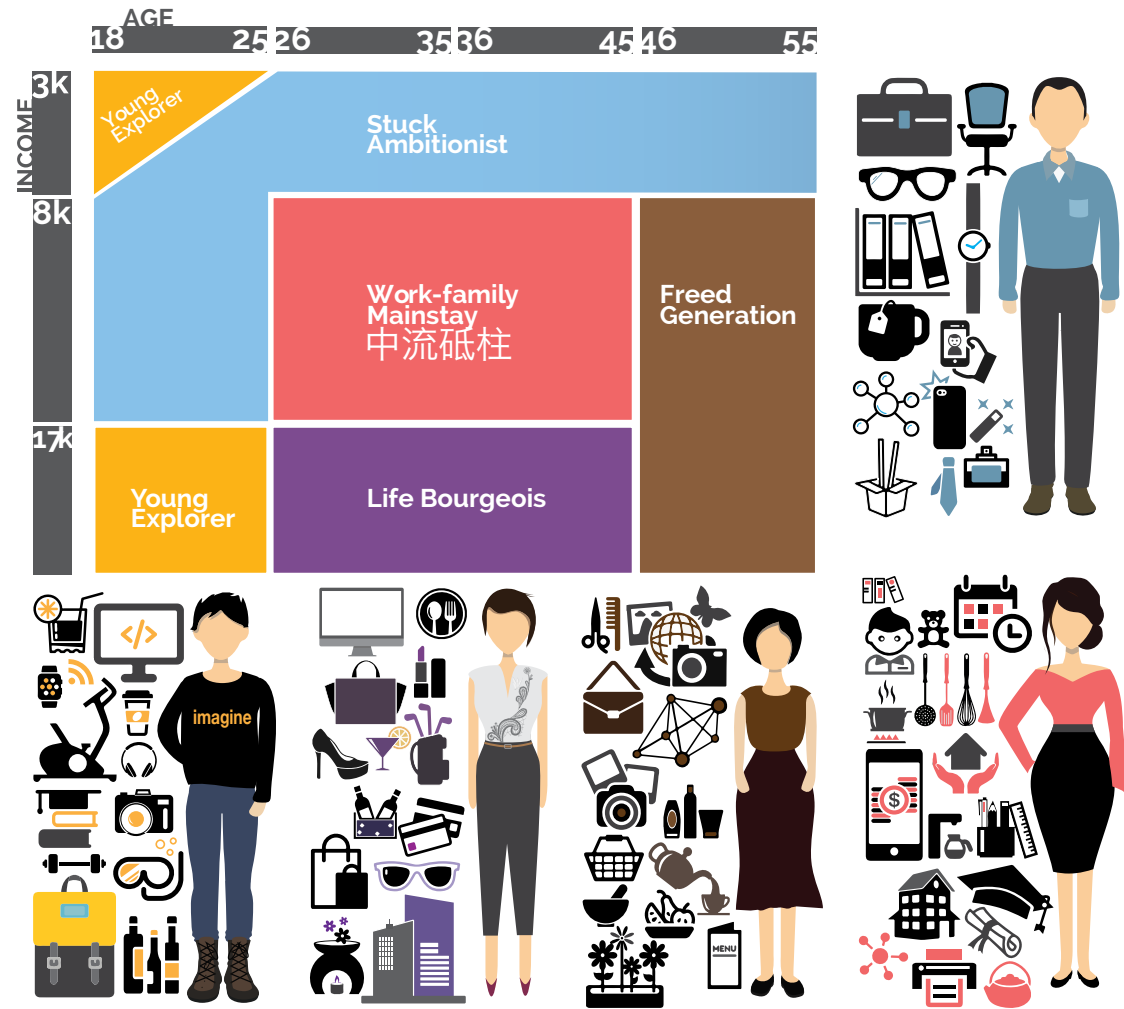
3. Understand

Cluster

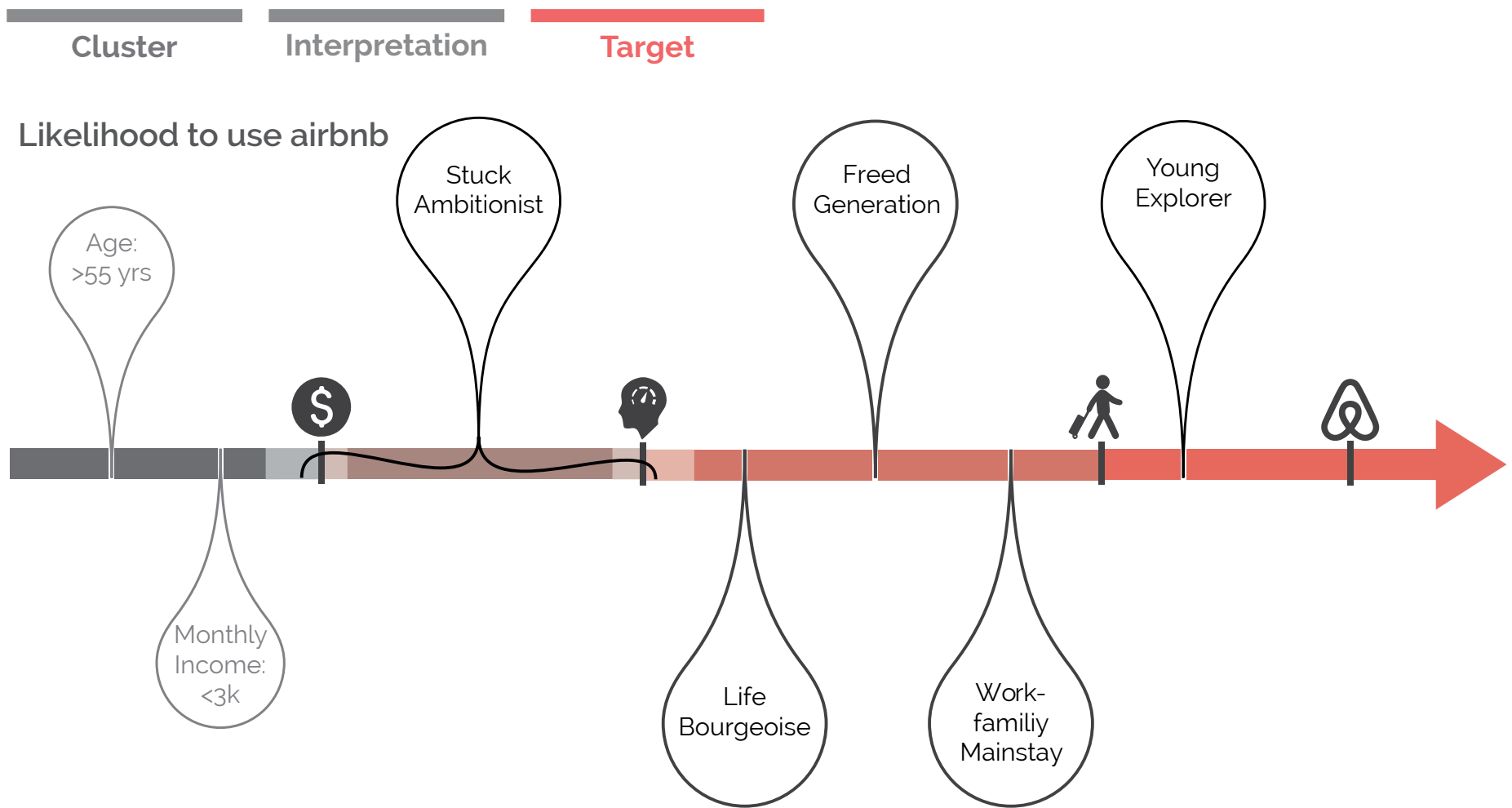
Interpretation

Target

In the Chinese social environment, traveler behaviors are not just decided by ages and incomes. People of a similar mindset behave similarly. It is important to know who they are, what they do, why they come together and how they behave in the Chinese context



3. Understand



Transitional change=

moving to economically ready + moving to psychologically ready.

(Stuck Ambitionst)

Psychologically ready=

ready to accept the concept of Airbnb, but may not necessarily be ready to actually use the service out of their concern

(Work-family mainstay+Freed Generation+Life Bourgeoise)

Behaviorally ready =

ready to experience Airbnb and use the service but may not have done so yet.

(Young Explorer)

4. Ideation

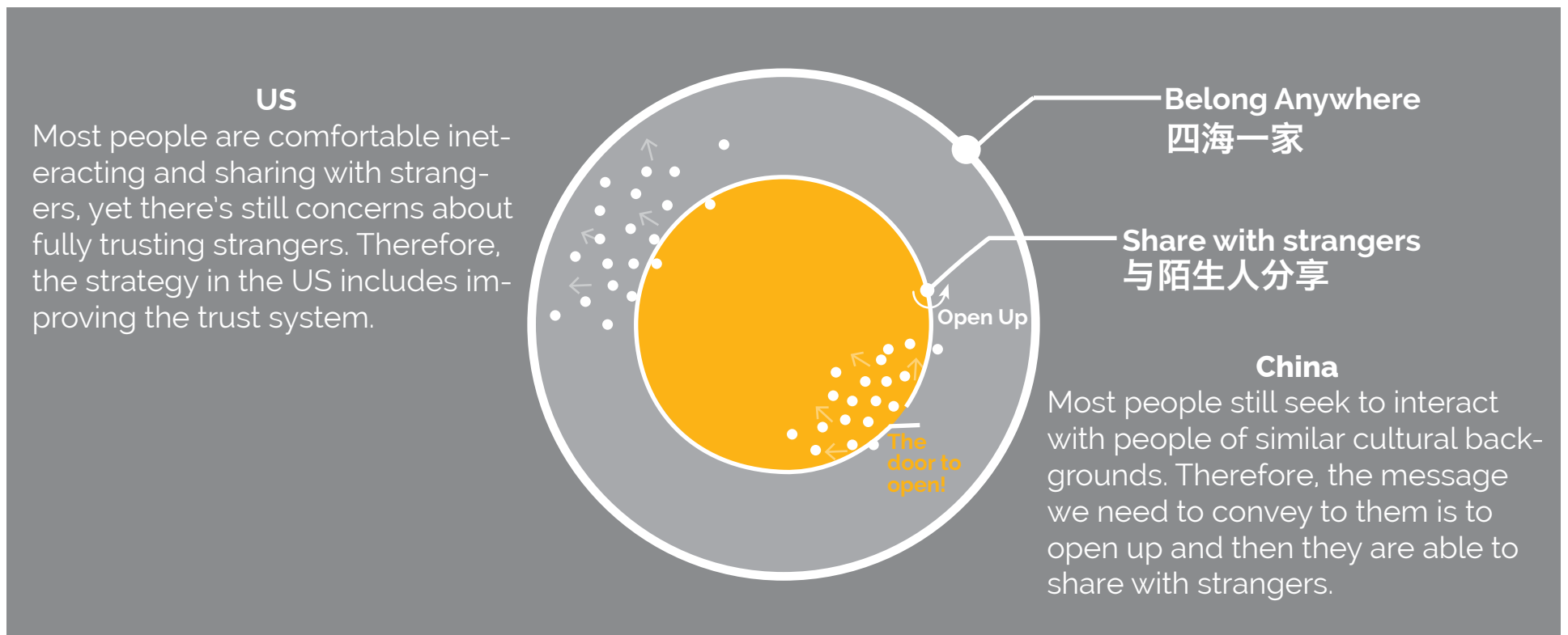
Entry strategy overview



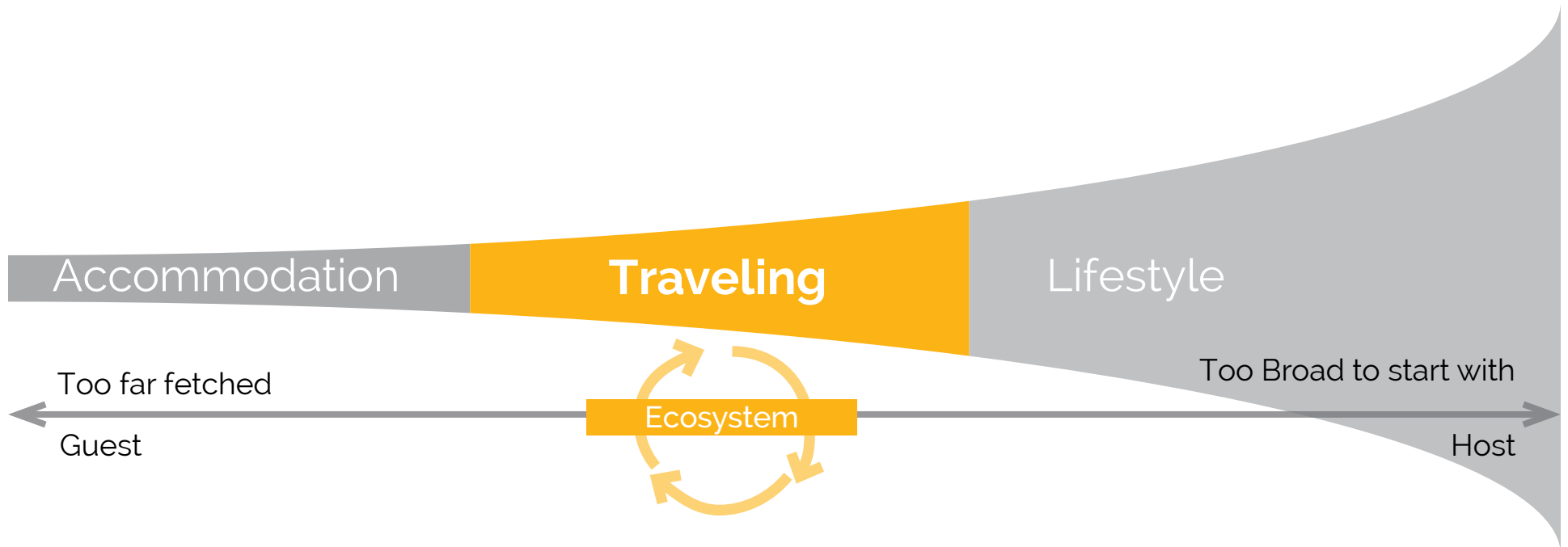
4.1. The Right Message

2.1 What should be the Right Message for China's Market

“Open the Door, Meet the World.” “推开一扇门，和世界相遇。”



4.2. The Right Place to Intervene



Housing is a part of traveling experience. Opening up cannot be triggered solely by an accommodation option, rather it is about the traveling attitude and whole traveling experience. Airbnb needs to encourage Chinese travelers to accept the new idea of "living with strangers" so they can start being a guest to people who are already comfortable sharing.

Traveling style is the epitome of lifestyle. Becoming an open-minded traveler can promote a more open lifestyle step by step. For Airbnb, it will encourage Chinese people to try the new lifestyle of "sharing with strangers", which can ultimately lead them to be a host.

5. Solution Overview

Solution

1. The Message
2. The Place to Intervene

The Message

**Original
Content**

Mindset

Video series

Psychologically prompt our audience to open up

Actions

Sharing&Sharing

Prep our audience with sharing-related activities for the actual act of sharing that comes along with opening up

The Place to Intervene

**Resource
Integration**

Ecosystem

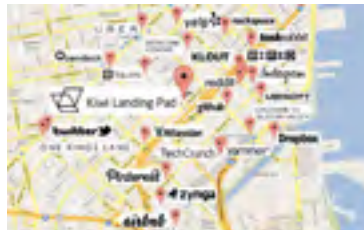
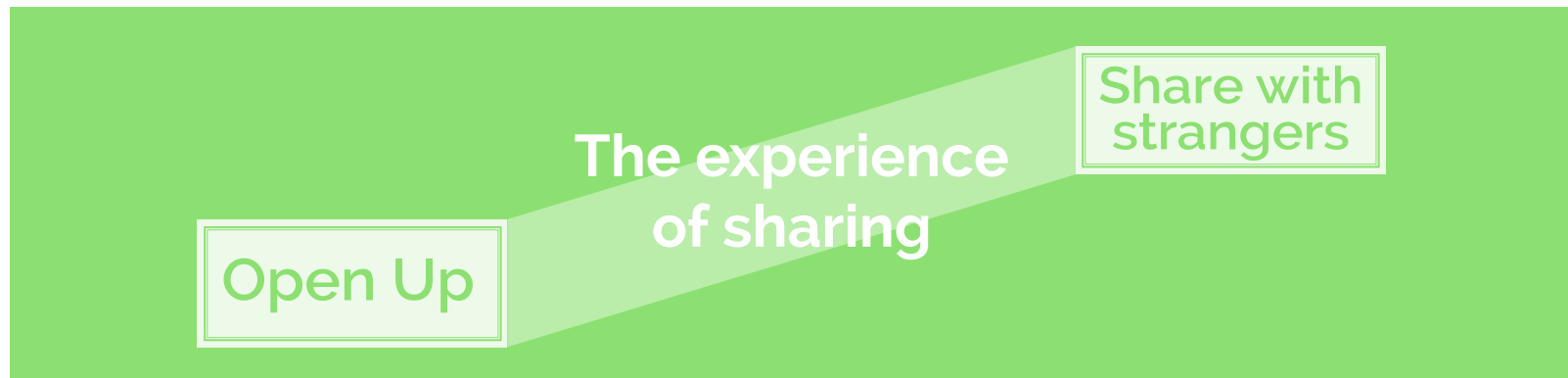
Travel Industry Ecosystem

An ecosystem revolving the flow of traveling that provides potential actions items and partnerships for airbnb to permeate the traveling market

5. Solution

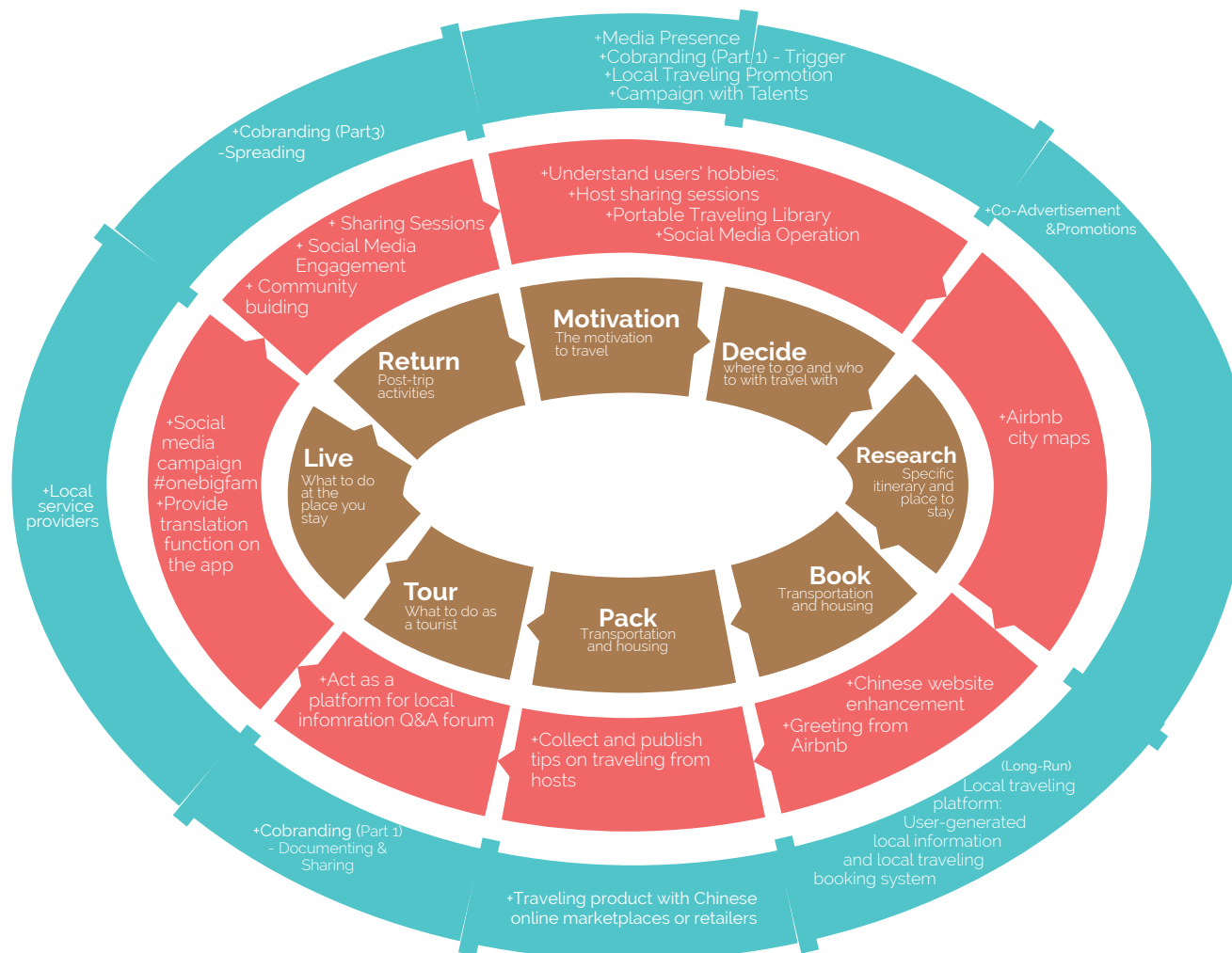
Sharing & Sharing - Overview

Since the key concept of airbnb is “sharing with strangers”, which is actually very new for Chinese outbound travelers especially when choosing accommodations. In order to encourage Chinese travelers who are psychologically ready for airbnb's concept but still have concerns about “sharing with strangers”, it would be more approachable to familiarize them with sharing, and gradually they will feel more comfortable with the idea of living with strangers in airbnb.



5. Solution

Ecosystem Overview



■ The basic flow of traveling;
 ■ Airbnb's action items;
 ■ Potential partnerships (in following pages)

Overall, this chart is an industry ecosystem of local traveling to show where airbnb can intervene.

5. Solution

Stage: Motivation and Decision

What

It's a moving house with the collection of things that represent local cities and it exhibits all around the world.

How

Collect:

Appeal to local people to bring what they think represents the city to the moving house.

Record:

Take pictures of the donated collection.

Exchange:

Allow local people use their own items to exchange for local items from previous cities.

Map:

When the moving library comes to specific city, airbnb can create an online platform where people in the city can pin their favorite places to go.

Engage:

Invite local authors, musicians, artists and designers to create a series of work about the city.

Exhibit:

Open the moving library to the public for two days for people to visit



Where

Major airbnb cities in the world

5. Solution

Stage: Booking

Airbnb+, Shairbnb, Airbnb Standard, Aibnb奇屋版



Airbnb+(升级版)



Shairbnb (分享版)



Airbnb Standard(标准版) - 游客



Airbnb Standard(标准版) - 房东

Recap:

1 There are five types of main traveling mindset among Chinese independent travelers: young explorer, work-family mainstay, freed generation, life bourgeois, and stuck ambitionist

2 In Airbnb's user framework, Chinese outbound independent travels are at five tiers: existing users, behaviorally ready users, psychologically ready users, transactional change users and not ready users. In order to attract mainstream travelers, Airbnb should target behaviorally ready users by providing experience and psychologically ready users by building brand at this stage.



**Thank
you**