



Case Study

2017 GOLD GLOBAL EFFIE AWARD WINNER

“DON’T GO THERE, LIVE THERE”

In just 8 short years, Airbnb has redefined the concept of travel accommodations. As global competition mounted, Airbnb needed to bring that disruptive soul to the masses, including its first real foray into China.

With global aspirations on a not-so-global budget, Airbnb created a single message that would resonate across wildly different cultures and disrupt the conventions of the industry. This single, universal message challenged millions of people to reimagine travel, resulting in the most dramatic business results in Airbnb’s history; an average global increase of 13% awareness and 7% consideration.

Competition:
Global Effie Awards

Ran in:
United States, United Kingdom,
France, Germany, China,
Australia, South Korea, India,
Brazil, Mexico

Category:
Transportation, Travel & Tourism

Brand/Client:
Airbnb/ Airbnb, Inc.

Lead Agency:
TBWA\Chiat\Day Los Angeles

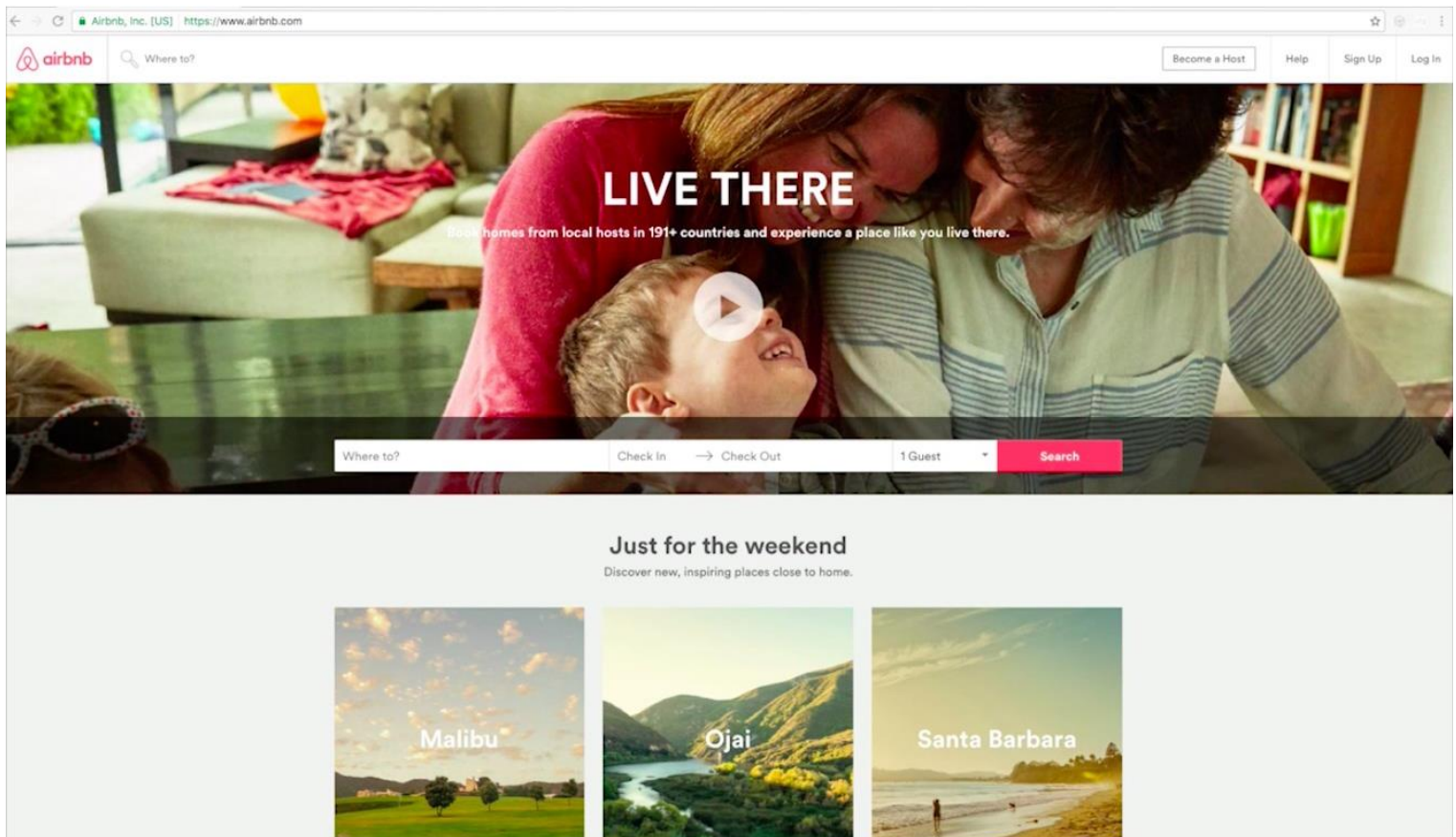
Contributing Company:
Starcom

Product/Service:
Type/Description of the
Product/Service

Classification:
Multinational

Dates Effort Ran:
April 20, 2016 to present

Credits:
Brent Anderson
Jennifer Costello
Andy Develvis
Alex Dimiziani
Nancy King
Kelly Lee
Marion Link
Brooke Lonagan
Jillian Mansheim
Jonathan Mildenhall



Executive Summary

In 2016, Airbnb – one of the world's most disruptive travel companies – told people everywhere to stop traveling. (**bolded as a header**)

Facing mounting market pressures, this is a story about Airbnb rising above the category fray to call out the problem with travel today and the position Airbnb as an antidote. With global ambitions on a local budget, Airbnb had to appeal to the masses, including its first foray into China. By making a universal idea locally relevant, Airbnb saw big gains across its brand and business. In the end, this singular provocative idea challenged millions to reimagine travel to create the most dramatic business results in Airbnb's history.

The Challenge Scale globally without losing Airbnb's soul. Address the need for global awareness and consideration gains through one global message that would resonate with travelers from France to China.

The Idea The antidote to soulless mass travel – Airbnb lets you travel like you live there.

Bringing the Idea to Life "Don't Go There, Live There" was a rallying cry to travelers to quit the tour groups and travel clichés and experience the world like locals, in a way that could only be done by staying on Airbnb.

The Results Surpassed all annual awareness goals in focus markets globally by mid year, and added the most dramatic three-month increase in consideration in Airbnb's eight-year history.

State of the Marketplace & Brand's Business

Airbnb is a disruptive tech and travel brand that makes cultural news daily. From product innovation to ongoing regulatory issues, Airbnb generates a lot of conversation and can seem larger than life.

In truth, Airbnb is still establishing itself as a global brand. Its 2015 campaign, "When you travel on Airbnb, you're never a stranger", created big awareness gains globally. However, it didn't run in key Asian markets. So even as Airbnb's global set its sights and ambitions higher, it had never taken on the challenge of creating a truly global campaign. As the new year began in 2016, we faced several key truths and challenges:

- Awareness on the rise, but still lagging the pack. After 2015's push, global awareness averaged approximately 47% lower than competitors (1). In South Korea and China, awareness stood even lower (2). However, Airbnb was starting to learn that not all awareness gains were created equal.
- As global awareness grew, consideration wasn't keeping up. Airbnb's awareness gains are generally driven by positive news – but sometimes, by not so positive news. Even as awareness grew, consideration didn't seem to be keeping pace (3).
- Deep pocketed competitors were trying to "out Airbnb" Airbnb: In 2016, we continued to see established OTAs considerably outspending Airbnb – but now, they were encroaching into Airbnb's unique identity. Some, like Booking.com in the west and Qunar in China, tried to align themselves with local and passion-based travel (4) — traits that are core to the Airbnb brand. Our work to dissipate fears of homesharing had even proven beneficial to our competitors, with Expedia acquiring home-sharing service HomeAway in late 2015 (5).
- Looking for global growth, but lacking a global budget: Attracting new audiences and driving breakthrough in Asia would be critical to Airbnb's continued growth, but true campaign localization would be impossible with our production budgets. How could we craft messaging that would resonate with wildly different cultures, without being overly simplified?

All of these challenges coalesced to form one of the most significant questions Airbnb had faced to date: could Airbnb scale without losing its soul? We'd proven that we could capture people's attention in 2015, but now that we were faced with the realities of global growth and competition, could we remain true to our pioneering and innovative spirit, while convincing travelers around the globe to take a chance on us?

Sources:

- 1 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016
- 2 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016
- 3 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016
- 4 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016
- 5 Investopedia, "What Expedia Acquiring HomeAway Means for Airbnb", November 2015

Audience

Airbnb has always defined its core audience, “Identity Voyagers,” as a mindset – people who consider travel a core part of their identity. An attitude once mainly seen in younger millennials, the tendency to value “experiences over things” and desire local experiences had become a global mindset that crossed boundaries and demos. (6)

This global desire for authentic travel experiences was a unifier for Airbnb’s audience globally, and would be key for creating a cohesive global campaign. However, for years, we’d been speaking to young, single adventurers with this mindset and hadn’t yet meaningfully addressed one key thing about our target audience.

Globally, more than half had kids, so in order to keep up with the pace of culture, increase awareness, and get more people to consider us, we needed to connect not only with our historical core, but with Identity Voyagers at more mature life stages.

- Audience 1: Identity Voyagers: Airbnb’s historical target. In many key markets, such as China, the majority of Identity Voyagers did not have kids (28%) (7).
- Audience 2: Identity Voyagers with kids: Our greatest opportunity to break through and generate awareness among new demographics would come from connecting with parents. In the US, 62% of Gen-X identity voyagers had kids (8). In South Korea, that number rose to 89% among Gen-Xers (9).

Sources:

6 Forbes, “Experiences over things; the future of the consumer economy”, March 2016

7 CM14AU China Marketing & Media Survey

8 MRI Doublebase 2015

9 Cible Medialand Presse

Objectives & KPI’s

Objective: Awareness– Create immediate uplift in global aided awareness, directly correlated with nights booked on Airbnb

KPI: Marked increase in aided awareness in core investment markets. In each market, this single campaign was expected to deliver awareness increases equal to 2/3 or more of each market’s projected annual goal. In China, we weren’t sure what to expect, since it was our first real foray into the market with a major campaign.

Goal:

US: +9% (Annual goal, +12%)

FR: +10% (Annual goal, +15%)

KR: +10% (Annual goal, +14%)

CN: No precedent

Objective: Consideration– Ensure that awareness was converting into something even more meaningful. Make sure that people not only saw us, but would actually consider traveling with us.

KPI: Past consideration shifts averaged 3% during campaign periods over the last 1.5 years and had been notoriously difficult to come by; expectations were quite low.

Goal: Beat past considerations shifts with a 4% average global increase.

Measurement Tool- All Metrics: Primary Research Partner- Benchmark vs. Wave 4, July 2016 (US)

Insight

Travel is the most aspirational thing in the world: The importance of travel to Identity Voyagers, and the world, cannot be overstated. When asked what they would do with all the money in the world, 42% of people say they would travel (10).

That's why we cling to reviews and recommendations, and all end up in the same place: This pressure we put on ourselves to crack that perfect trip leads to a major flaw in the system. 88% of global travelers list review sites as the most important factors influencing travel decisions (11). The problem is, we end up in the same places, we stand in the same lines and take the same picture; "going" and "doing" cities, rather than truly experiencing them. The result is heavily overcrowded tourist destinations and unhappy travelers.

In China, this misery has its own name. Rebelling against the world's perception of Chinese tourists as the cliché tour group travelers, Chinese millennials displayed an outsized appetite for real, local experiences. Their disappointment at finding tourist traps in their dream destinations quite literally made them ill; a condition known as "Paris Syndrome" (12).

With Airbnb, it's different. When you stay on Airbnb, you're free of conventional tourist neighborhoods, because you're staying in the heart of a real, local 'hood. You're grounded in the comfort of a real home, with space to play and cook. Welcoming, local hosts can teach you something new— so everything feels a little less foreign. When you stay on Airbnb, you don't feel like you're on a trip as a tourist— you feel like you live there.

Sources:

10 Airbnb & YouGov plc., Proprietary Research, April, 2016

11 Ipsos + TripAdvisor, "Trip Barometer: Travel Trends 2016", 2016

12 Bloomberg, "The Paris Syndrome Drives Chinese Tourists Away", August 2014

The Big Idea

Airbnb lets you travel like you live there.

Bringing the Idea to Life

It was a global rallying cry that would challenge adventurous audiences the world over, families and non-families alike, to quit the tour groups and experience the world like locals, in a way that could only be done by staying on Airbnb. Films opened with a provocation. :60, :30, and :15 second spots implored tourists: "Don't go to Paris", "Don't go to LA" and "Don't go to Tokyo." Opening shots were filled with scenes of conventional modern travel, including crowds, selfie sticks, and monuments that were leaving our targets stressed and unfulfilled. We were a travel brand telling people not to travel, at least not like they used to, but to actively reevaluate the way they experienced travel.

The campaign encouraged people to instead LIVE THERE —to stay in a house outside of traditional tourist zones and revel in the authentic experiences they unlocked: trying new foods, exploring local neighborhoods, and meeting new host friends. It reinforced Airbnb's benefit to families by giving them starring roles, balancing the adventure of a new experience, with the experience of being in your very own home. "When you stay on Airbnb" spots told them, "you have your own home. Make your bed. Cook. You know, the stuff you normally do."

We wanted to subvert traditional tourism campaigns, inspiring Identity Voyagers to reimagine travel and embrace unique experiences with Airbnb. Videos were developed with sequential messaging in mind. Our approach was to balance broad reaching efforts that showed what 'living there' was all about, and then followed up with personalized connections focused on families and travel inspirations like food, fashion, and music.

Across the markets, spots ran on TV in engaging environments like the Euro Football Championship, NBA Playoffs, and the season

finale of Modern Family to build awareness of the Airbnb name. Print and OOH were used in each market to introduce the brand, featuring real moments of living that only happen when you feel truly at home – including a father and child sleeping on the hammock, a mother and daughter reading together, and a same sex couple preparing dinner.

Social helped to build additional understanding of what makes travelling with Airbnb special. On Pinterest, a platform typified by pinning visions of aspirational travel, bold, animated pins read “DON’T PIN THERE, LIVE THERE.” New, interactive and immersive Canvas ad units from both Facebook and Instagram Carousels were utilized to create first of their kind guides that offered travelers tips from locals on how to “live there” in major tourist hot spots.

While building reach was vital to increasing awareness, we also needed to break through the category to inspire a re-imagination of travel. First of its kind split-screen 3D cinema technology juxtaposed living there and touring in the US, UK, and AU. Viewers wearing 3-D bifocal glasses could choose to look down and watch travelers experience traditional trips, or look up and experience the sights and sounds of living there, on local side streets, with new friends.

Localized activations in China and Korea helped strategically address trepidation around homes and hosts. In South Korea, Airbnb took to social to ask their community for real photos of themselves and their families enjoying Airbnb homes. The resulting photography was featured in OOH units across the country, creating a personal connection with families. While in China, short-form video created in partnership with Eat Solo introduced the market to local hosts in a way that highlighted their friendliness while showing the benefit of hosts to travelers.

Communication Touch Points - All

Branded Content

Cinema

Consumer Involvement/User Generated

- Consumer Generated

Interactive/Online

- Brand Website/Microsite
- Digital Video
- Display Ads
- Mobile/Tablet Optimized Website

Mobile/Tablet

Paid Media Expenditures

Budget

- Less than other competitors.
- About the same as prior year’s budget.

The Live There campaign effort was Airbnb’s largest investment in a single effort to date with global support across 10 markets. However, the brand still invests significantly less than major competitors in every market. While Airbnb investments are growing, the brand is outspent by competitors with deeper pockets.

Owned Media

After our campaign launch, “Live There” became a guiding principle in Airbnb’s product. The campaign film and “Live There” language secured a prime spot at the top of Airbnb.com and Airbnb’s mobile app, with language from the spot appearing throughout .com and the mobile product. We also updated our owned social profile photos and headers to feature “Live There” imagery.

Sponsorship

- 👉 Display Ad
- 👉 In-App or In-Game Ad

OOH

- 👉 Place-based
- 👉 Transit

PR

Print

- 👉 Magazine- print

Search Engine/Marketing (SEM/SEO)

Social Media

TV

- 👉 Interactive TV/Video on Demand
- 👉 Spots

Sponsorships across TV and digital touchpoints were key ways for Airbnb to align with travel content, and further consideration goals. In TV, Airbnb had a sponsorship of Travel Channel’s “Dive Into Summer” timeblock in the US. In digital Airbnb teamed up with partners like Afar, Eat Solo, and Konbini that encouraged our audience to explore authentic travel experiences, with content like New Food Capitals of the World and Adventure Travel.

Results

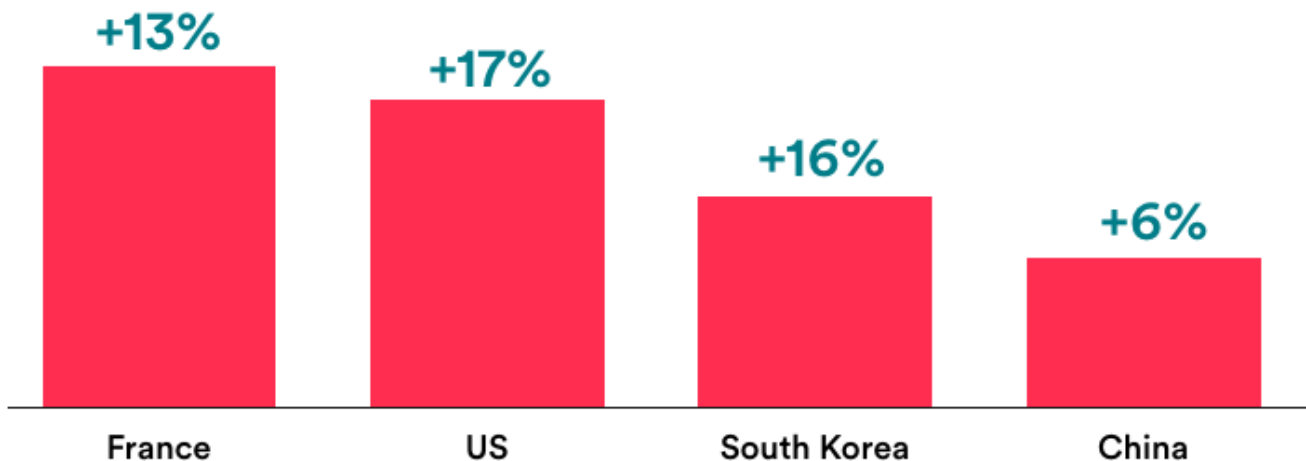
Airbnb’s biggest global campaign to date set out to capture the soul of our brand and drive growth around the world. The result? Surpassed almost all annual awareness goals globally- by mid-year.

Airbnb’s primary objective was to create a global increase in awareness with a single global message that would resonate with travelers from France to China. The results exceeded our expectations. Our single, resonant message allowed us to surpass our goals in France, the US and South Korea so much so that we broke through our ANNUAL goals by mid year (13).

In China, our most culturally distinctive market, the campaign resonated as well, resulting in a 6% increase in a market where awareness growth usually crawls (14).

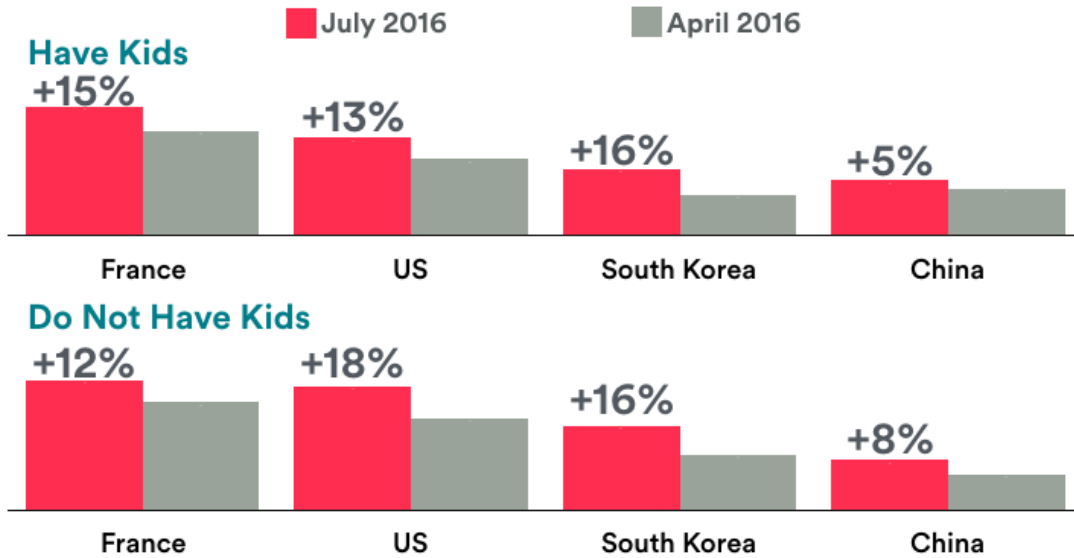
Aided Awareness Shift

Pre-Campaign (April 2016)- Post-Campaign (July 2016)



A deciding factor in Airbnb’s gains was new audience segments. For the first time, Airbnb made inroads with families around the world. The campaign proved that Airbnb could capture the attention of a broad group of travelers while staying true to itself (15).

Aided Awareness by Subgroup



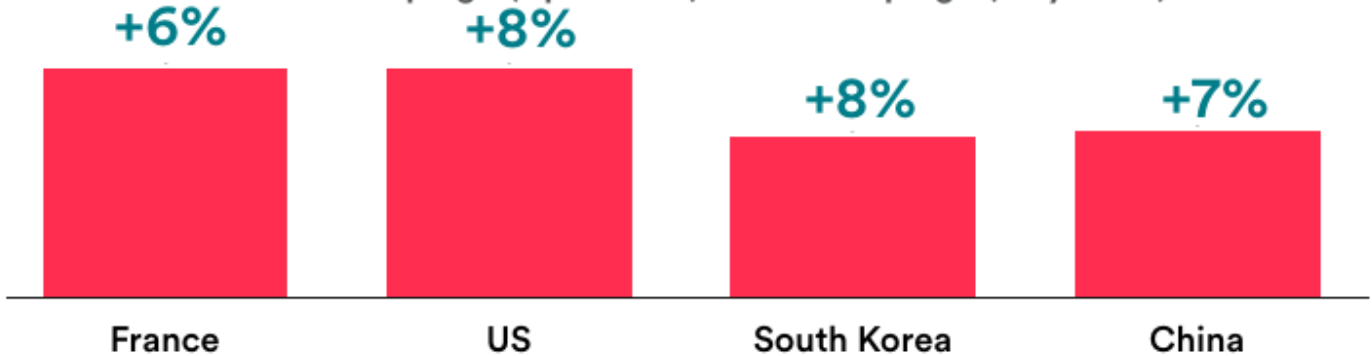
Compared to last year’s campaign, “Live There” created between 2-6x the effective reach, or percentage of overall reach that makes an impact on the viewer (16).

The biggest consideration increase in Airbnb’s history

A major indicator of success would be whether our global message would help people to not only see us, but consider us for upcoming travel. The campaign delivered the biggest consideration in any 3 month period in Airbnb’s history. Increases in South Korea and China even met or surpassed those of our western markets. at a 7% global average increase in awareness, we had beat our goal, and more than doubled past campaign averages (17).

Consideration Shift

Pre-Campaign (April 2016)- Post-Campaign (July 2016)



A lasting impact on brand and product

In addition to being integrated into Airbnb’s product, CEO Brian Chesky championed “Live There” as a guiding principle in the brand’s future. As we look to 2017, “Live There” continues to have an enduring impact on the brand and product, and the heart of the message will carry into future campaigns and product updates.

This was Airbnb’s most successful campaign to date, and its first truly global message. A new global audience of travelers accepted our challenge and learned what it means to LIVE THERE. Even if it’s just for a night.

Sources:

13 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016

14 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016

15 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016

16 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016

17 Primary Research Partner, Benchmark Brand Tracker, Wave 3 (US), April 2016

Other Contributing Factors

While Airbnb is a brand constantly in the spotlight, time series data from our research partners clearly shows Live There impact, with significant gains during the campaign period. Campaign surveys from ResearchNow, Facebook, and Google Consumer Surveys also corroborate campaign impact.



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