

Primary Research

Interview

Key Characteristics

- Working, college educated
- Travel Addictor (travel 3-6 times a year)
- Assertive

Distinctive Attitudes and Behaviors

- Prefer unique and customize travel route
- Don't mind to travel alone or travel with strangers
- Wanna know more in-depth culture of the places
- Tour guide is the most important for them when telling them the history
- Use online source to prepare the trip

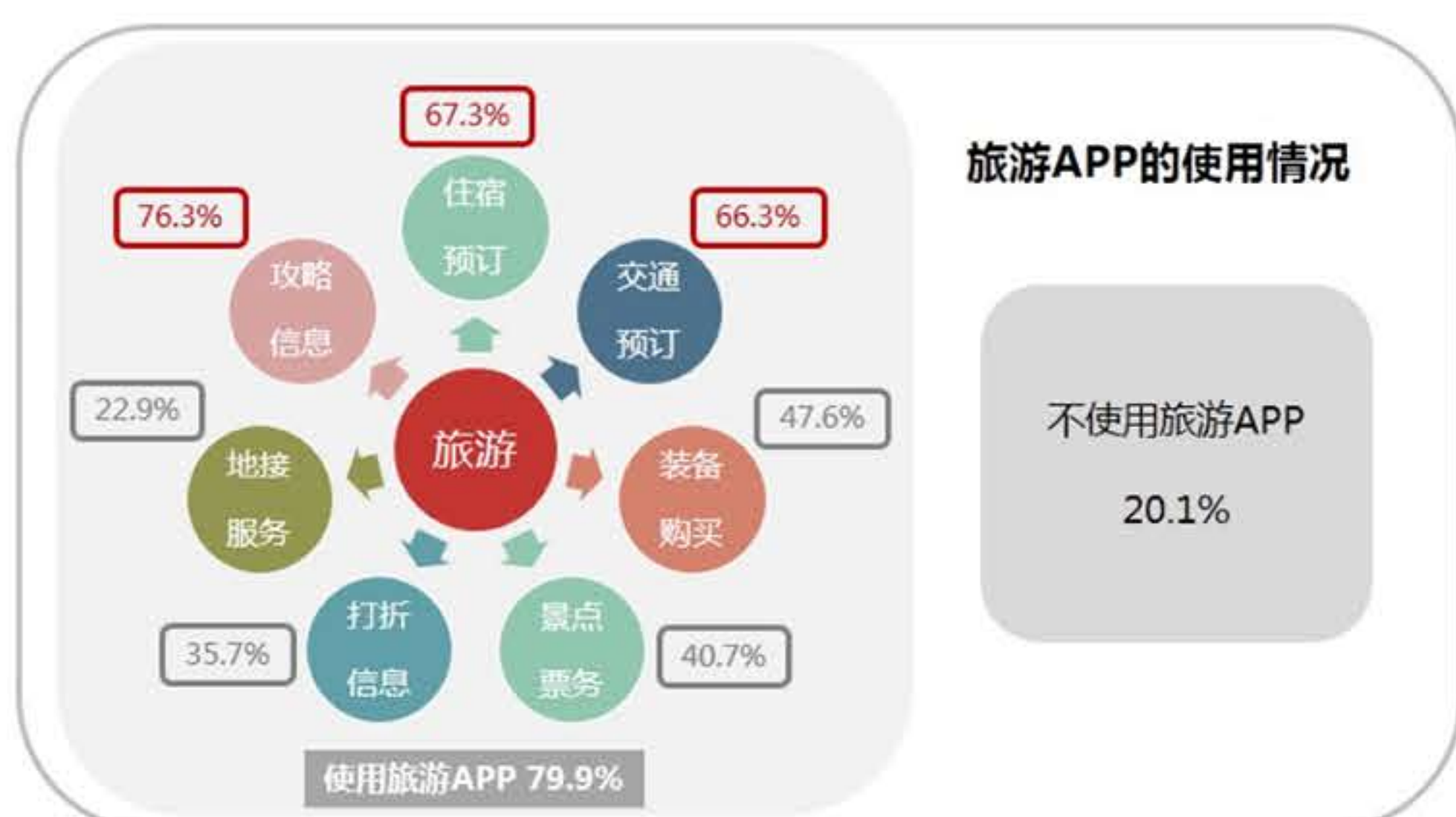
Secondary Research

Most of the Travellers use Travel App

1. Over 80% mobile user downloaded travel apps
2. They mainly focus on Information, Hotels & Transportation
3. Travellers get used to prepare the trips via the apps

06 旅游APP在“移动网民+旅游者”中覆盖率高

- 在参与调研的智能手机用户群中，近八成旅游消费者使用旅游APP安排行程；在攻略信息查询、住宿和交通预订三个旅程环节，旅游APP使用最多。
- 全流程服务越来越受到人们喜爱，旅游用户已逐渐习惯在旅游APP上提前筹备旅程。旅游APP已能提供全流程链条的旅行服务，极大提升了用户的下载使用意愿。



* 多选，各选项之和大于100%

数据来源：企鹅智酷调研

制图：企鹅智酷



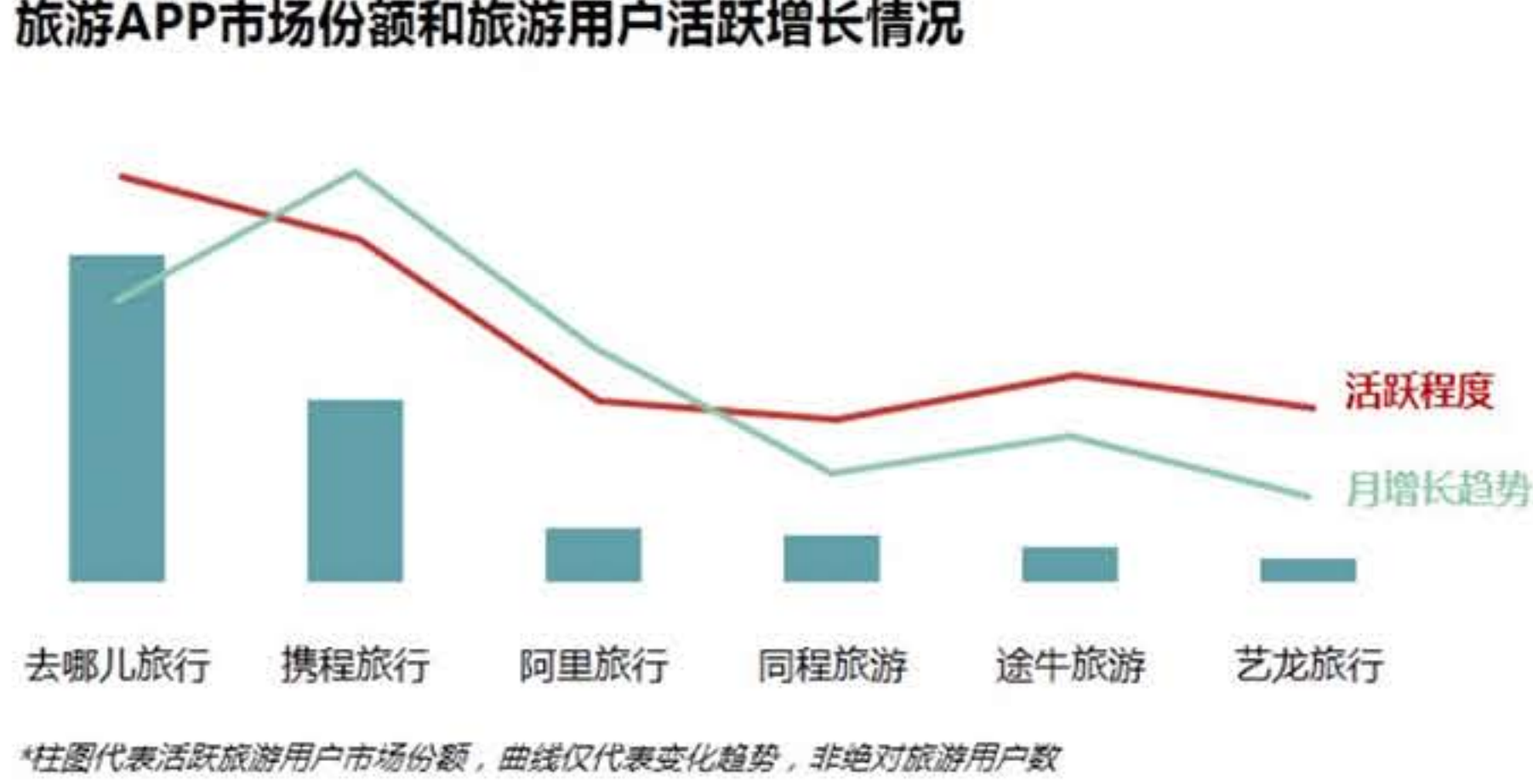
Travel App is competitive and there are 2 apps monopolize

1. Over 70% travel market is monopolize by them
2. Have to find the edge that is different from them

08 巨头垄断旅游APP市场，差异化是竞争砝码

- 携程与去哪儿是较早发力移动端的企业，借助网站业务积累的大量旅游用户，不断开拓新服务提升旅游用户体验。到目前几乎垄断了七成以上的旅游市场。无论从旅游用户活跃度还是增长趋势角度看都呈现出赢家通吃的局面，携程旅行的潜力巨大。
- 借助于平台实力的阿里旅行和持有境外游实力的途牛也表现出乐观增长的势头，老牌主打休闲的同程和专注酒店业务的艺龙在旅游用户活跃度和增加趋势上表现都不太占优。

旅游APP市场份额和旅游用户活跃增长情况



* 柱图代表活跃旅游用户市场份额，曲线仅代表变化趋势，非绝对旅游用户数

数据来源：应用宝大数据中心

制图：企鹅智酷

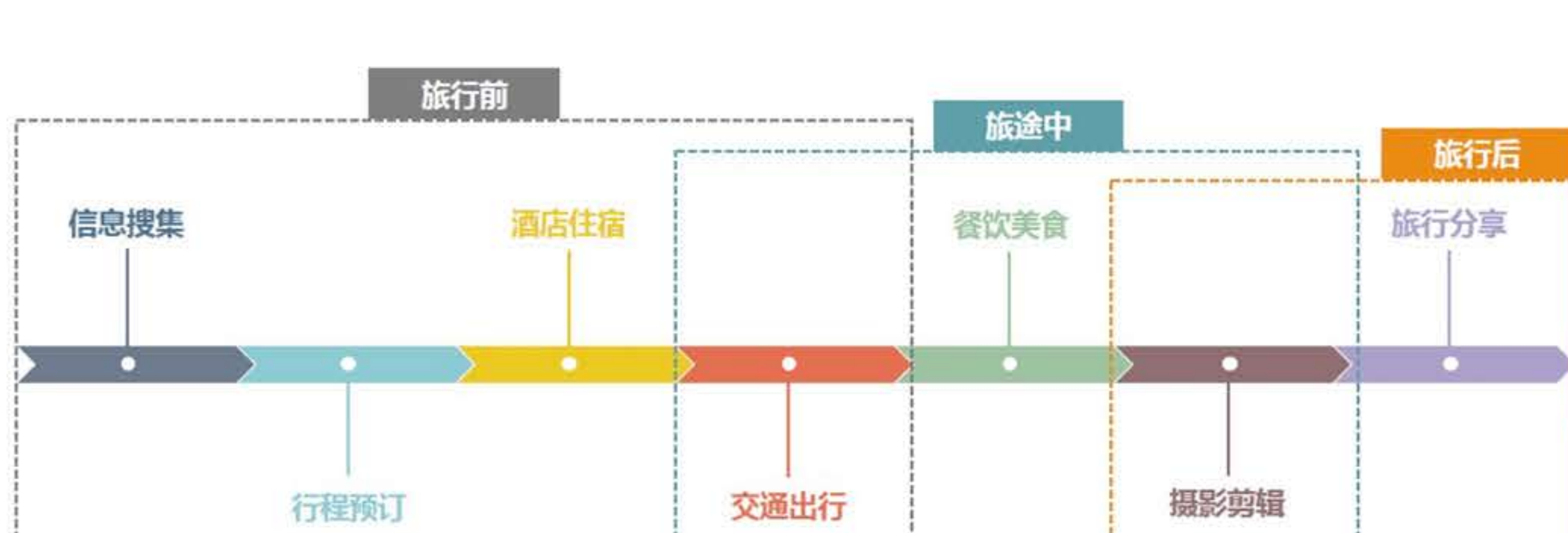


Travel Business Ecosystem

1. Pre-Trip (Information Research, Trip Booking, Hotels Reservation)
2. Travelling (Transportation, Restaurant, Photo Shooting)
3. Post Trip (Photo Shooting, Sharing)

10 旅游市场生态链

- 信息搜集、行程预订、酒店住宿、交通出行、餐饮美食、摄影剪辑和旅行分享等七个板块构建了完整旅游生态链，旅游蛋糕的大头集中在旅行前的筹备期，也是旅游行业竞争最为激烈的领域。

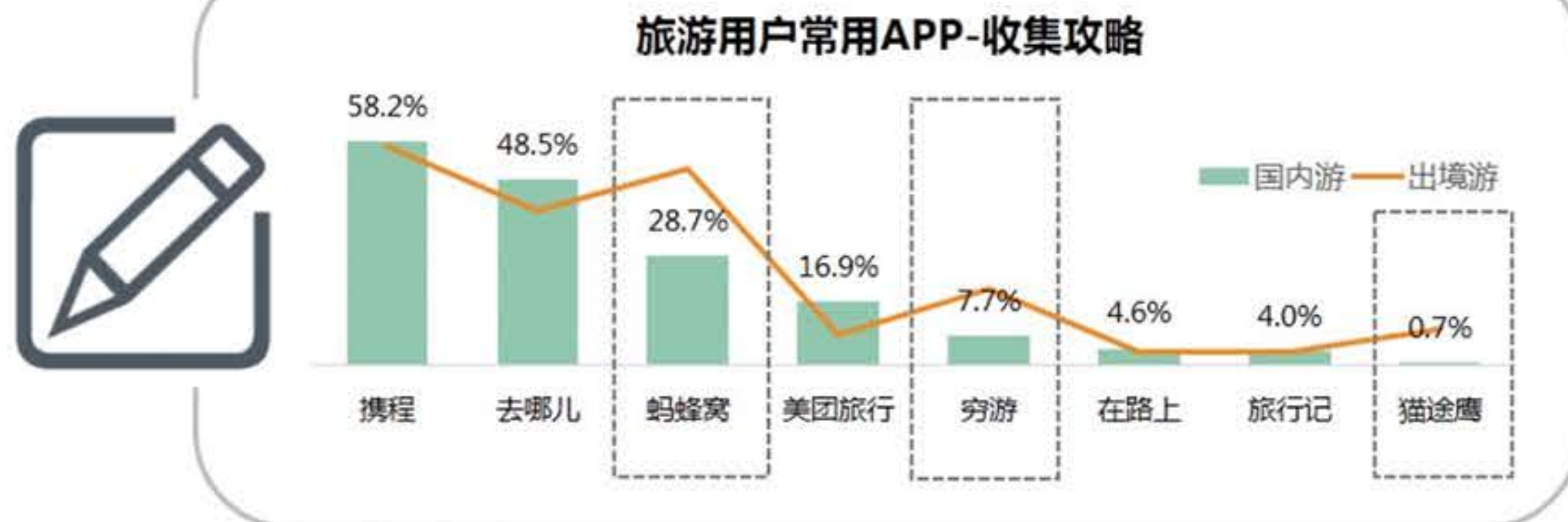


Information Research: Tips make the app performance impressive

1. Provide tips and blogs with big library make the app has good performance

11 信息搜集：攻略先行，蚂蜂窝表现亮眼

- 携程、去哪儿是旅游用户获取攻略的最常用APP，主打旅游攻略的蚂蜂窝紧随其后，提供旅游用户评价服务的美团旅行也有不俗表现。相比国内游，出境旅游用户在蚂蜂窝、穷游和猫途鹰上寻找攻略较多。鉴于收集攻略是游客使用旅游APP的重要事项，提供攻略和社交分享几乎已成为旅游APP的标配，蚂蜂窝正是凭此成为挤进攻略APP第一梯队。



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数据来源：企鹅智酷调研

制图：企鹅智酷



Travel Apps assistant

1. Maps, Translation are the highest
2. People born after 90s like going without planning, but non-90s they are more organized
3. Over 70% travellers will download these apps

20 出境游：助手类APP市场渗透高

- 地图、翻译类APP是出境游客高频下载使用的旅游工具。喜欢独自出游的90后更加依赖手机地图，非90后更喜欢提前了解美食、天气等信息。
- 对于下载旅游助手APP，90后的热情不及非90后，前者出境游喜欢随心所欲，后者更具规划性。
- 超过70%的出境游客都会提前下载旅游助手APP，助手类APP在出境游市场具有较大的布局空间。

出境游前下载的旅游助手APP



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数据来源：企鹅智酷调研

制图：企鹅智酷



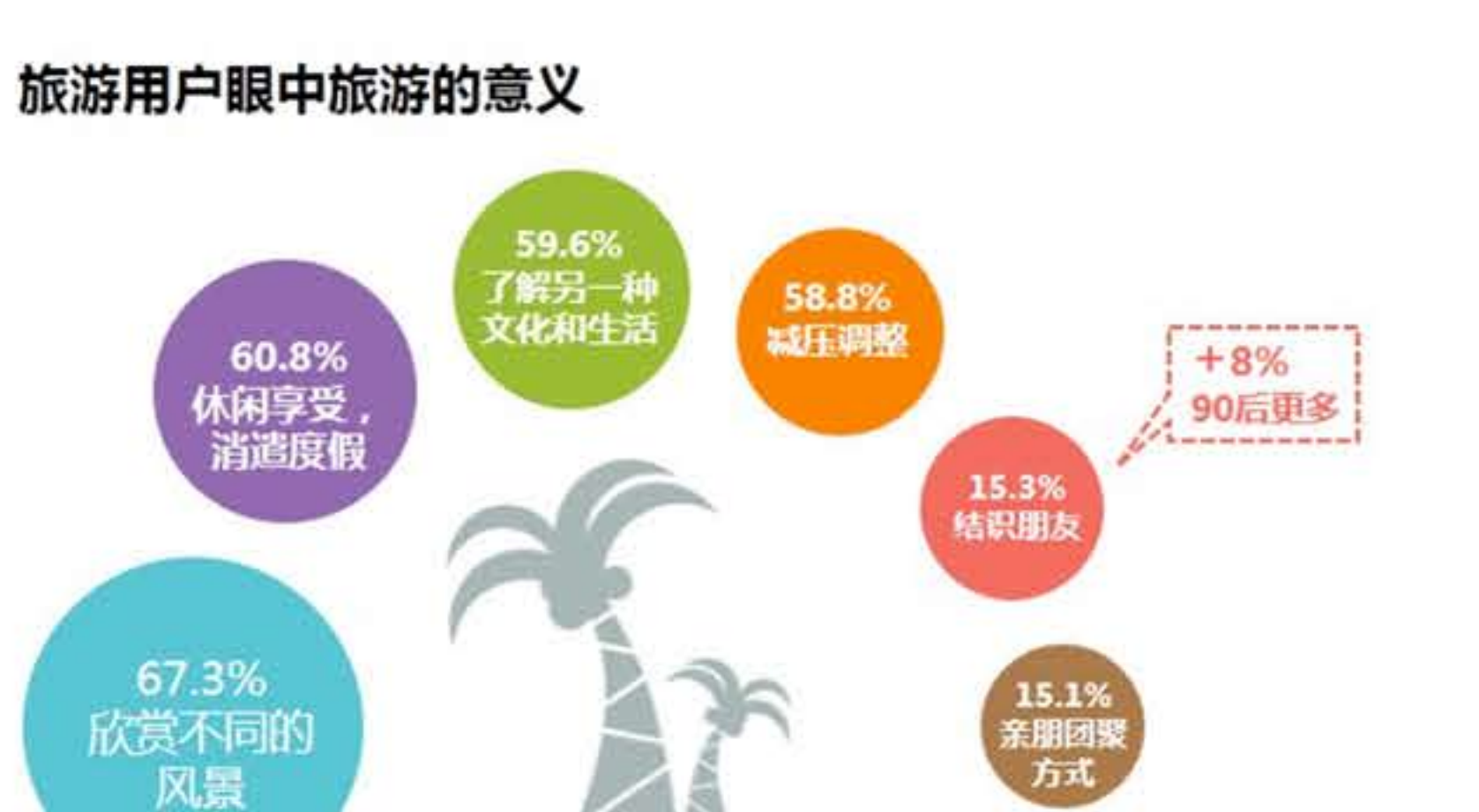
The Characteristic of the place is important

1. Landscape is the highest motivation for travelling but relax travelling becomes the second main purpose.
2. There are 56.9% traveller wish to understand the other culture and lifestyle.
3. 15.3% traveller wish to know more friends , especially teenagers.

45 风景之外，突出休闲、度假和减压的主题

- 欣赏风景仍然是人们出行的最大动机，然而随着需求层次的提升，休闲游成为继观光游之后又一大旅游项目。
- 59.6%的旅游用户希望通过旅游来了解另一种文化和生活，相似比例的旅游用户希望借助旅游来减压。带有本地特色和减压放松的旅游服务项目会受到旅游用户的欢迎。
- 15.3%的旅游用户希望在旅途中结识新朋友，偏爱独行的90后更渴望这一点。

旅游用户眼中旅游的意义



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数据来源：企鹅智酷调研

制图：企鹅智酷



Conclusion

- Unique and characteristic information and tour should be developed
- The way of present the information could be more creative
- Customization travel route has big potential
- Except focus on preparation, we should focus on the role of the app during travelling
- Finding tour guide and travel partner could be included in the app