

Consumer Survey

AIRBNB AND COMPETITORS

December, 2020

BACKGROUND:

- ❑ Survey of 1,100+ US Consumers balanced to census.

FINDINGS:

- ❑ **Customer View/Sentiment Toward Airbnb Stronger Than Views Toward Alternative Channels**
 - ❑ Airbnb has a considerable lead when it comes to Net Promoter Score relative to alternative channels for booking travel. Airbnb users have a very positive view of the platform, in most cases more favorable than competitive options
- ❑ **Future Airbnb Usage Intention Trends Are Favorable**
 - ❑ Customers say they have been increasing usage of Airbnb in recent years and that they expect the trend to continue in future years. Consumers feel that is a major popularity gainer within the travel space.
- ❑ **Travel Dipped in 2020, looks to bounce back in 2021 and 2022**
 - ❑ The percentage of consumers who took a trip in 2020 in which they needed to pay for an overnight stay dropped relative to 2019. Consumers expect travel activity to bounce back in 2021 and expected a positive inflection in travel spend, in particular, in 2022.
- ❑ **More Details About The Airbnb User**
 - ❑ The Airbnb user is far younger than the average consumer and compared to users of competitive platforms. They are also more affluent than the average respondent and than OTA users. Potentially due to the user cohort being young, Airbnb users are among the least likely to say they would take the Covid vaccine.



I

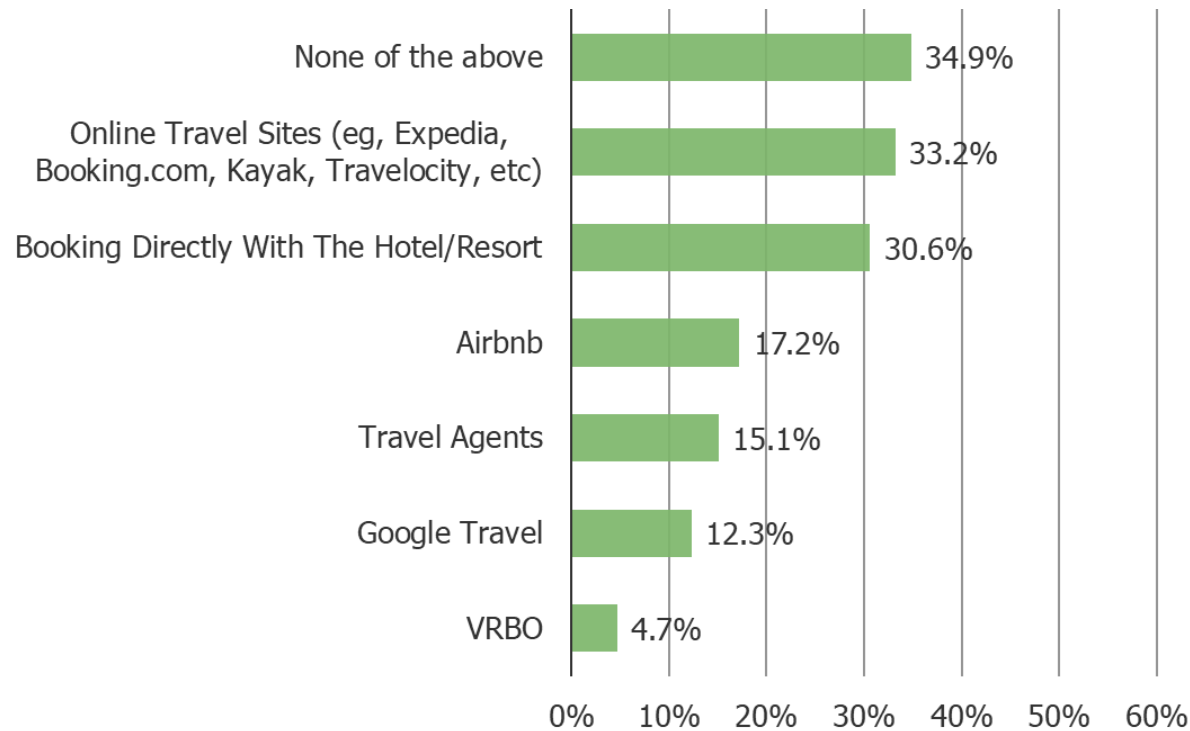
☐ **AIRBNB AND COMPETITORS FEEDBACK**

☐ **TRAVEL TRENDS YEAR-BY-YEAR**

☐ **DEMOGRAPHICS AND COVID IMPACTS**

Have you ever booked overnight travel / stays through any of the following services? (Select ALL that apply)

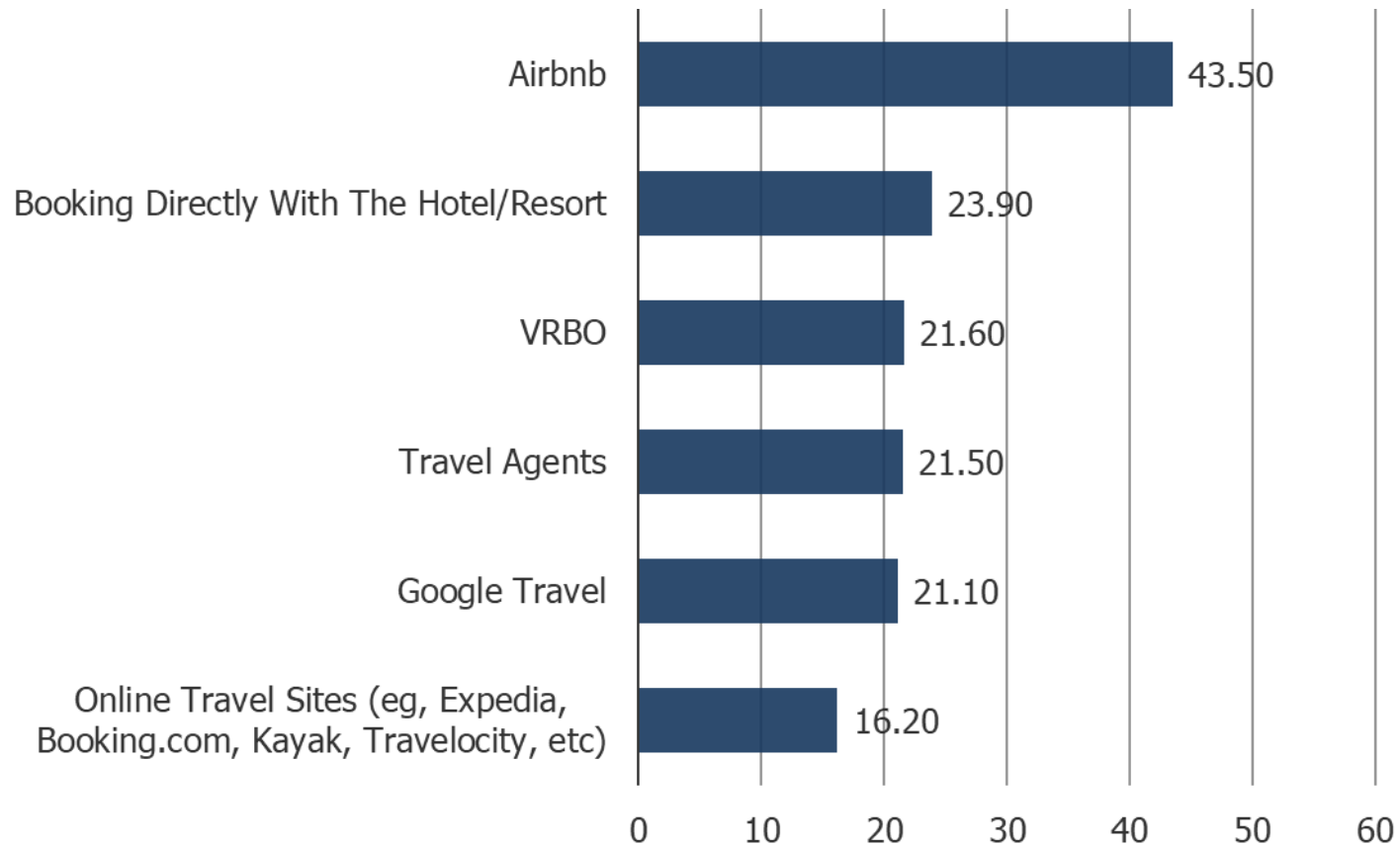
Posed to all respondents.



Age	Airbnb	VRBO	Online Travel Sites	Google Travel	Booking Directly With The Hotel/Resort	Travel Agents	None of the above
18-24	30.1%	3.9%	26.2%	11.7%	31.1%	8.7%	31.1%
25-34	26.6%	4.0%	34.5%	15.1%	29.5%	11.2%	32.7%
35-44	15.7%	7.2%	37.3%	19.5%	34.3%	18.6%	23.7%
45-54	16.5%	3.7%	38.4%	14.6%	31.1%	19.5%	30.5%
55-64	7.2%	4.8%	28.1%	3.6%	27.0%	9.6%	52.1%
65-74	5.9%	4.4%	27.4%	3.7%	30.4%	20.0%	45.9%
75+	2.4%	2.4%	29.3%	0.0%	34.2%	29.3%	41.5%

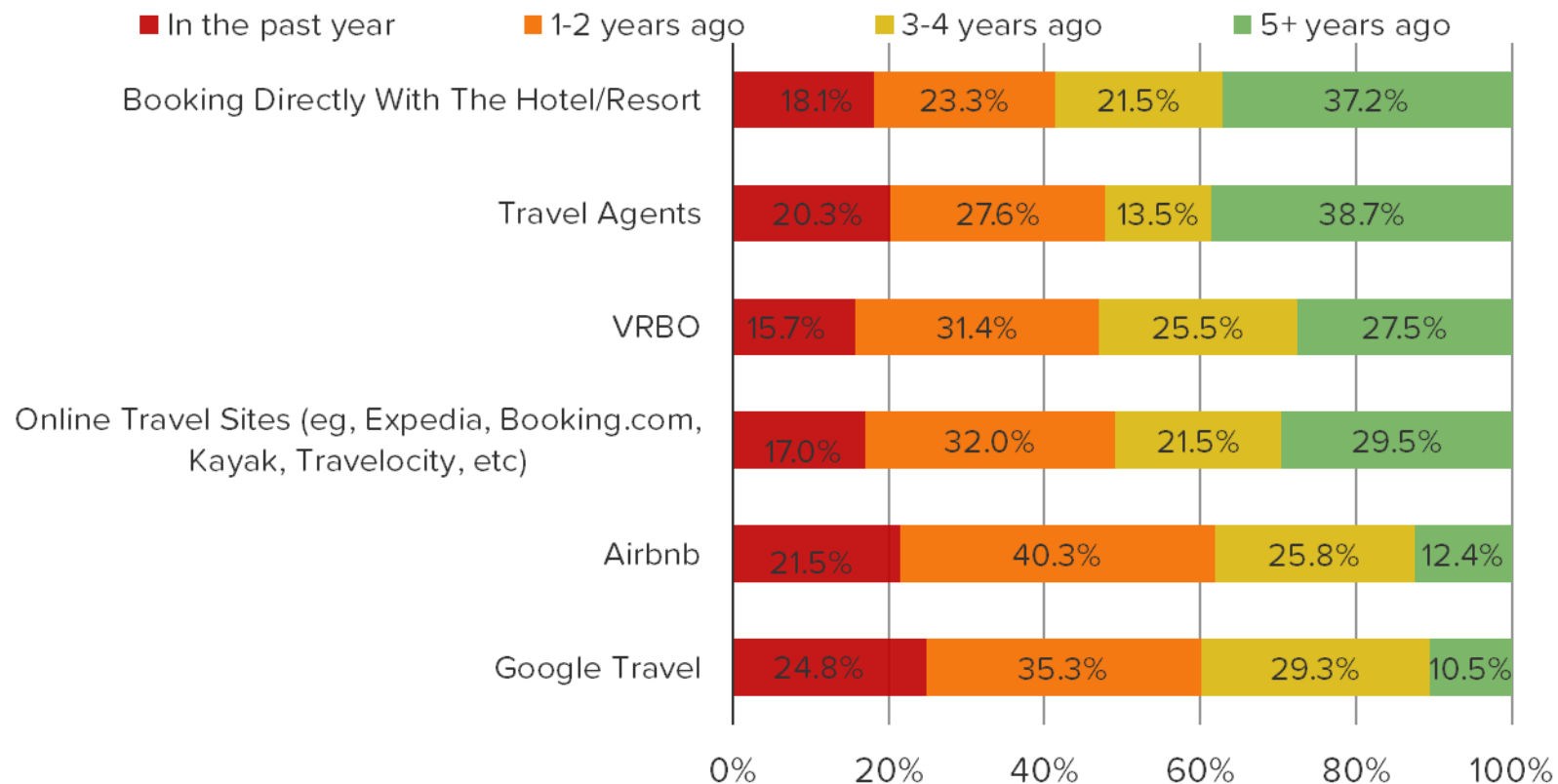
How likely is it you would recommend the following to a friend or colleague? (NPS Result)

Posed to all respondents who have used the below.



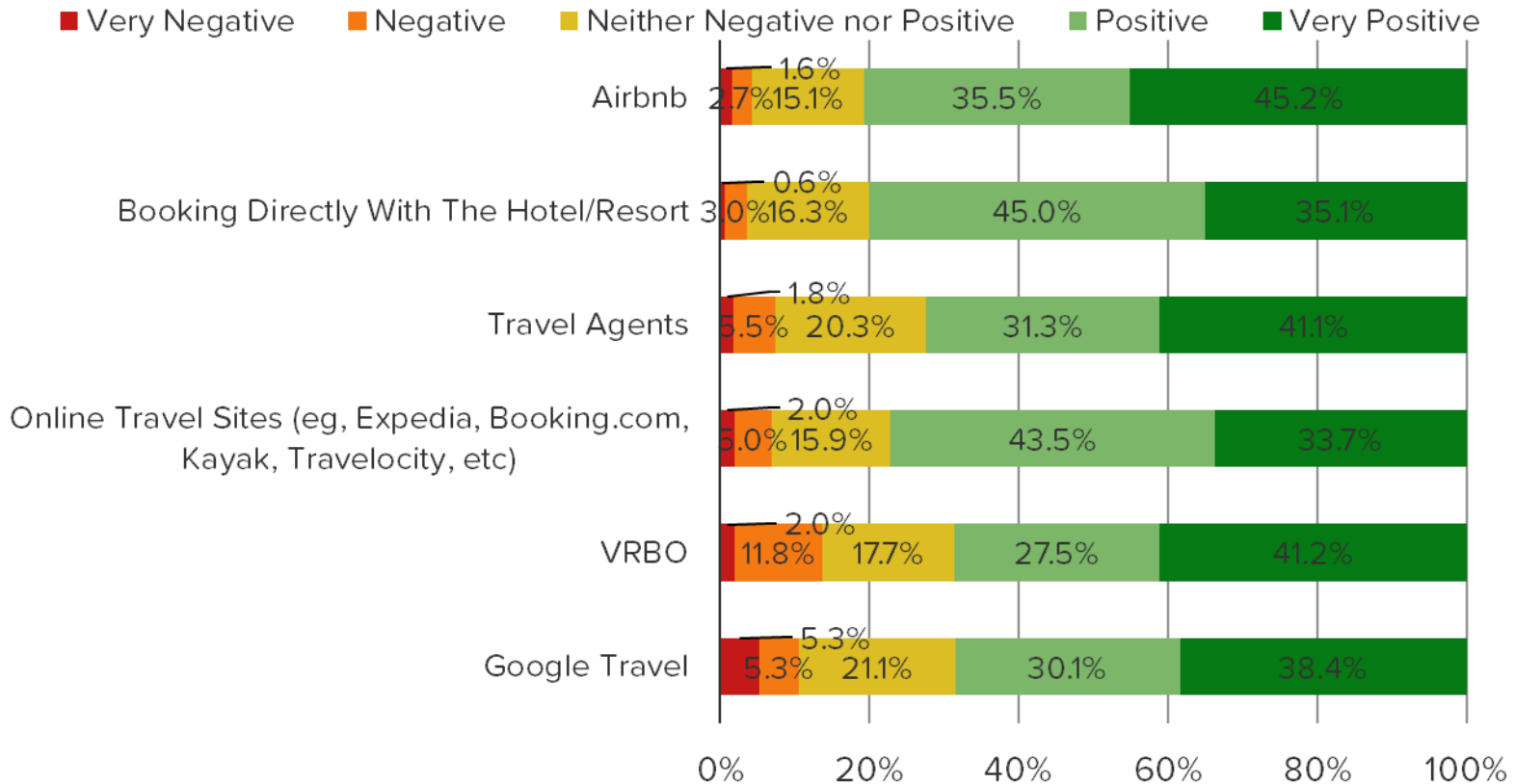
When did you use the following for the first time?

Posed to all respondents who use the below.



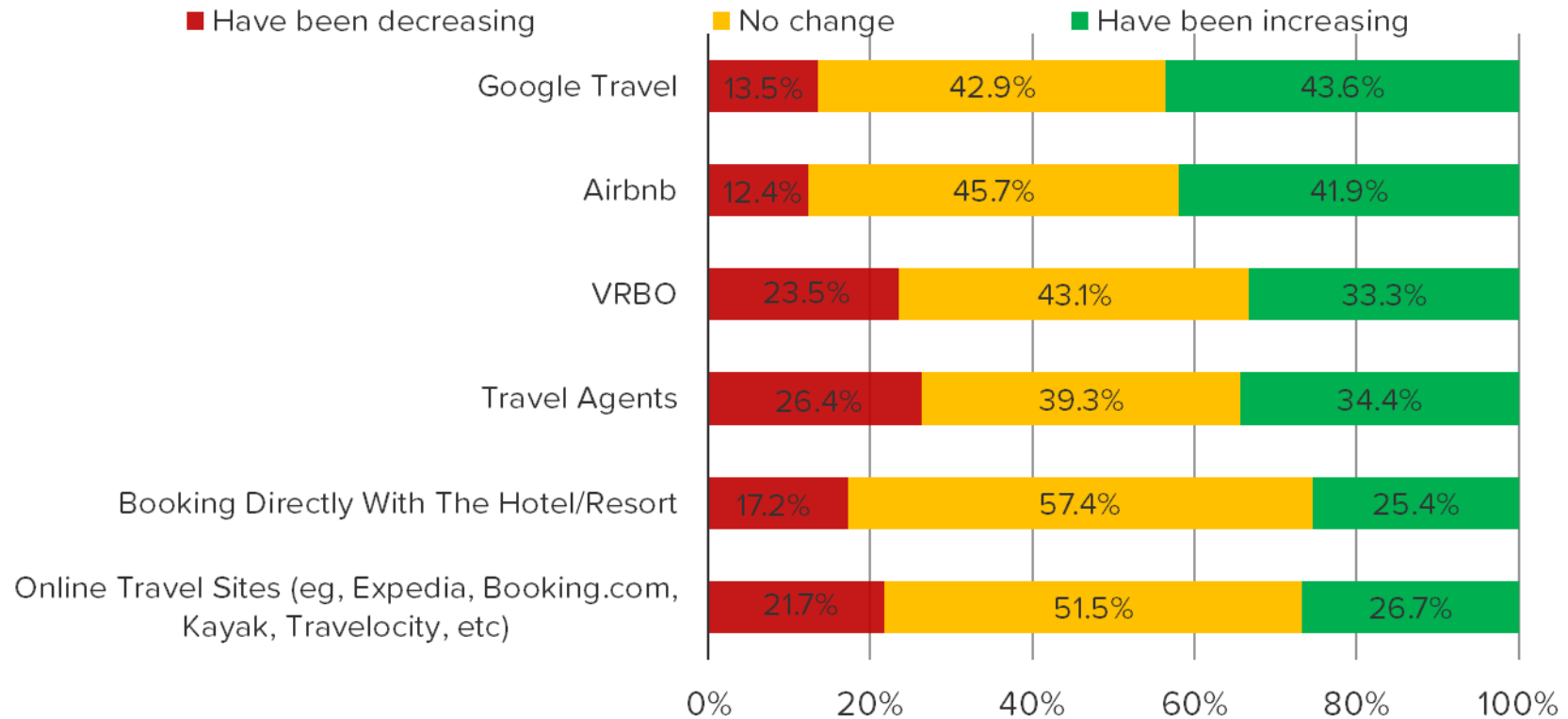
What is your overall opinion of the following?

Posed to all respondents who have used the below.



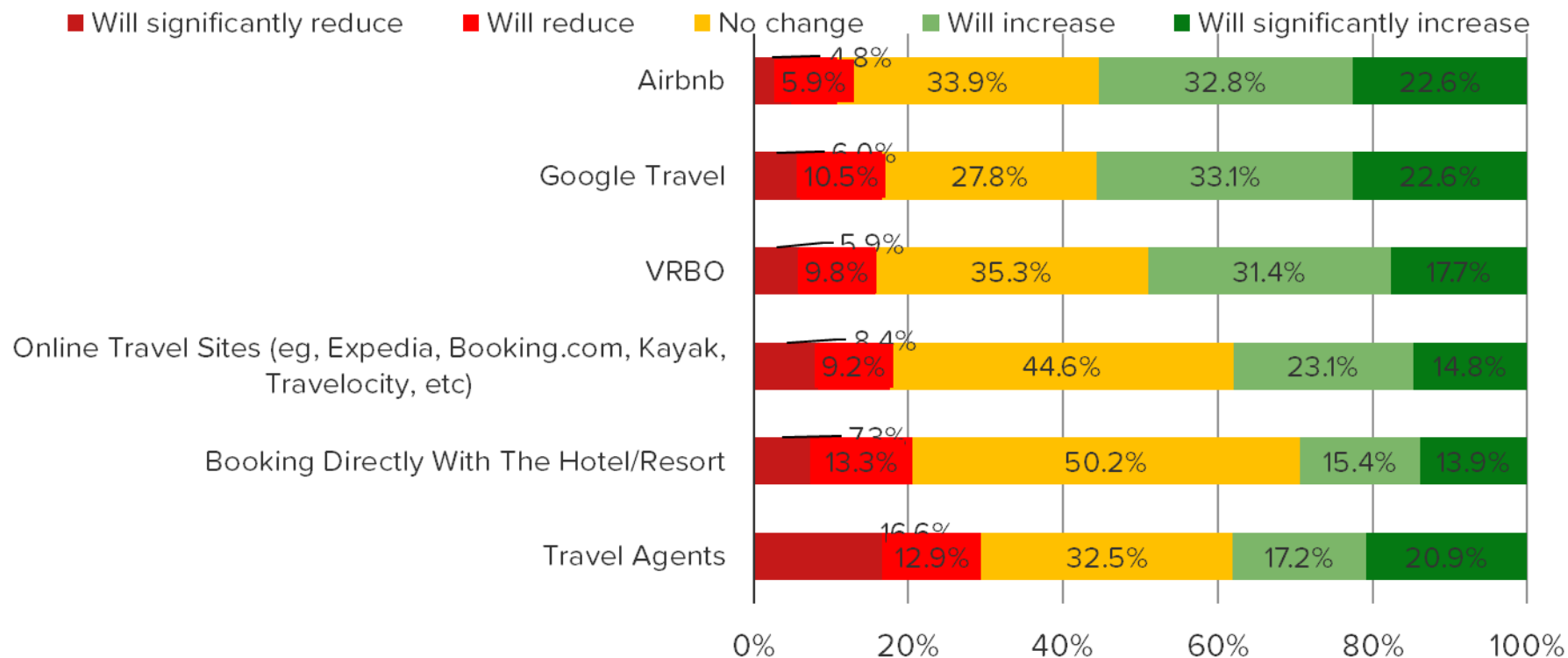
In recent years, have your changed how often you use the following?

Posed to all respondents who have used the below.



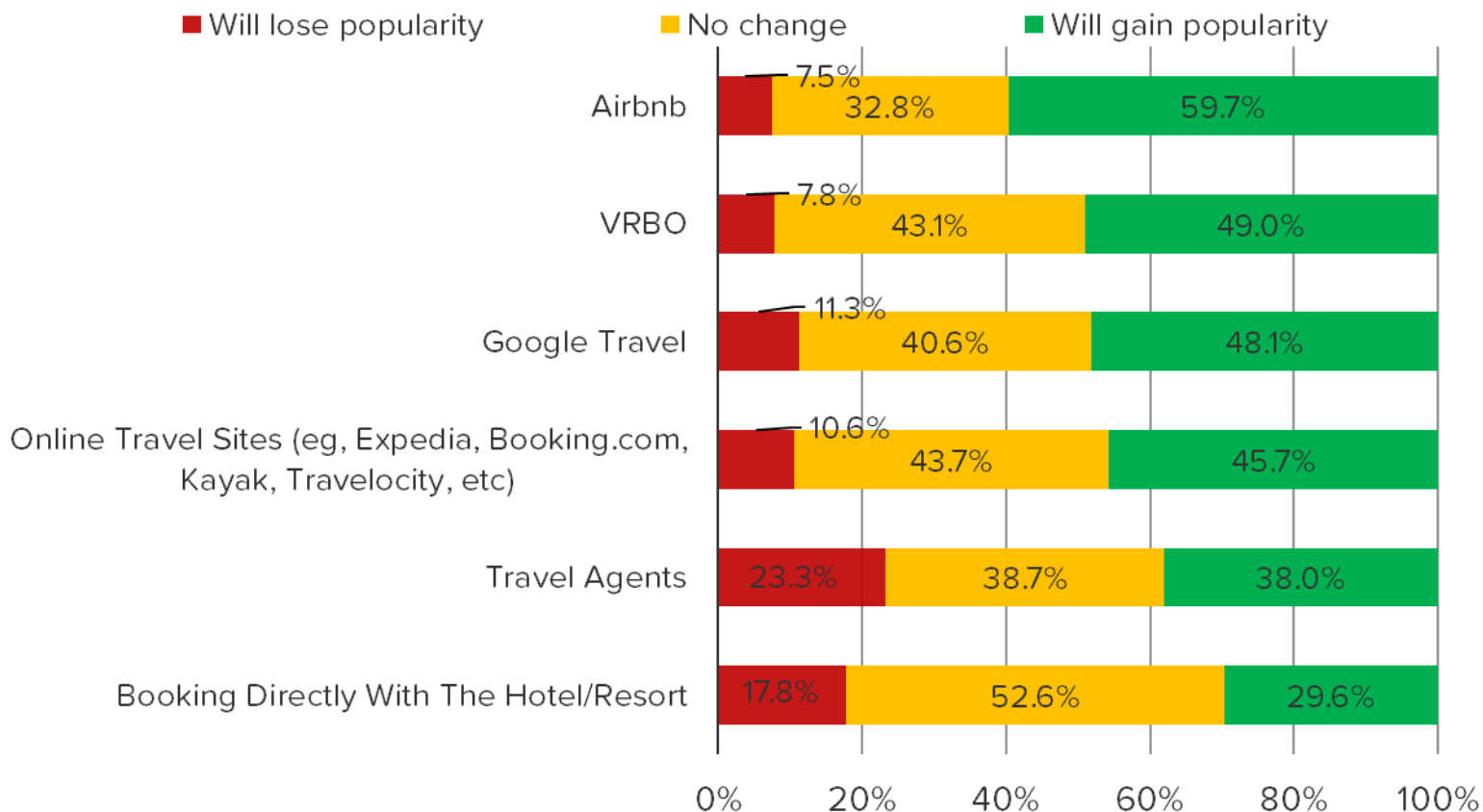
Going forward, do you expect to change how often you use the following?

Posed to all respondents who have used the below.



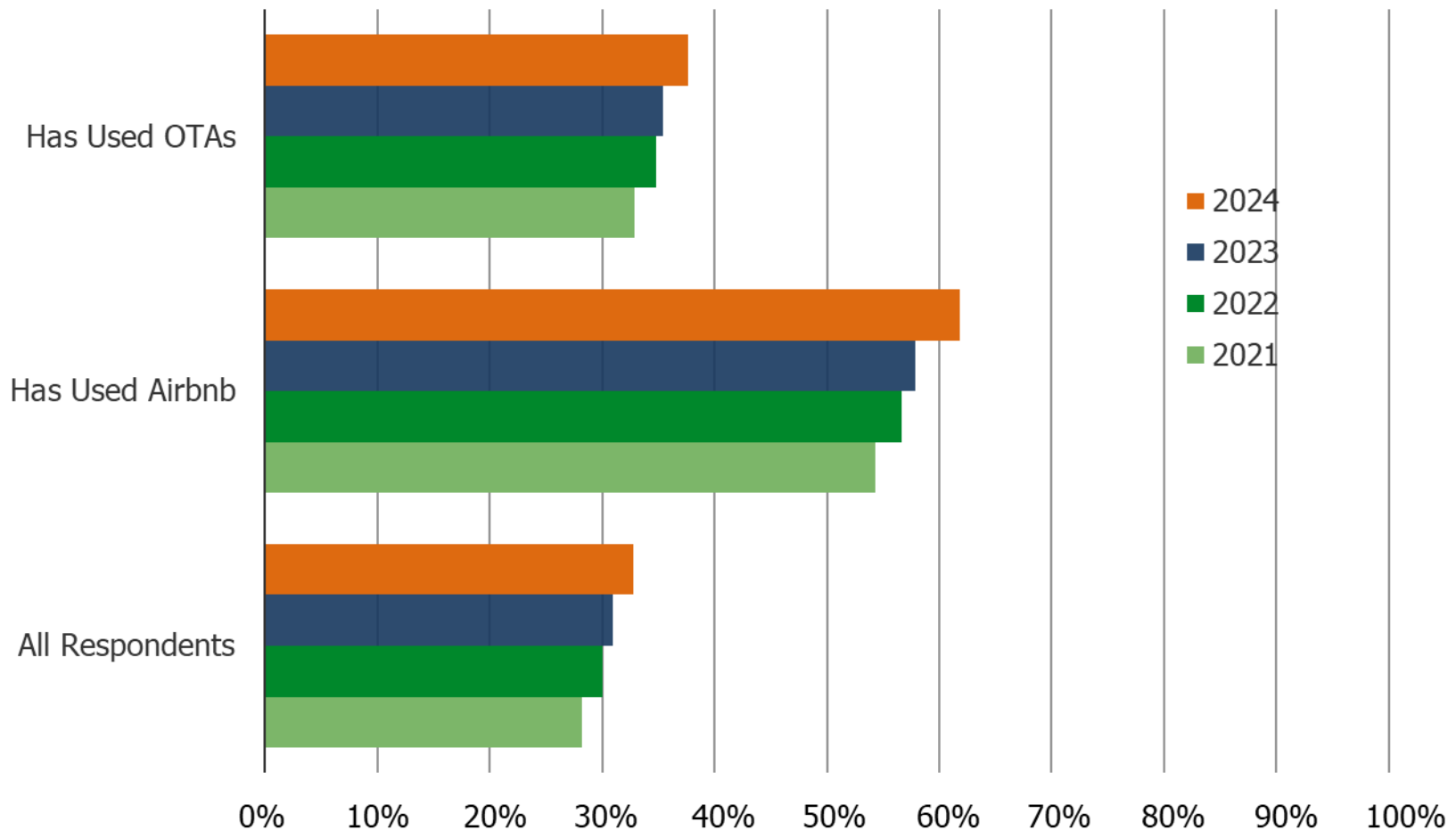
Going forward, do you expect the following to gain or lose in popularity with consumers?

Posed to all respondents who have used the below.



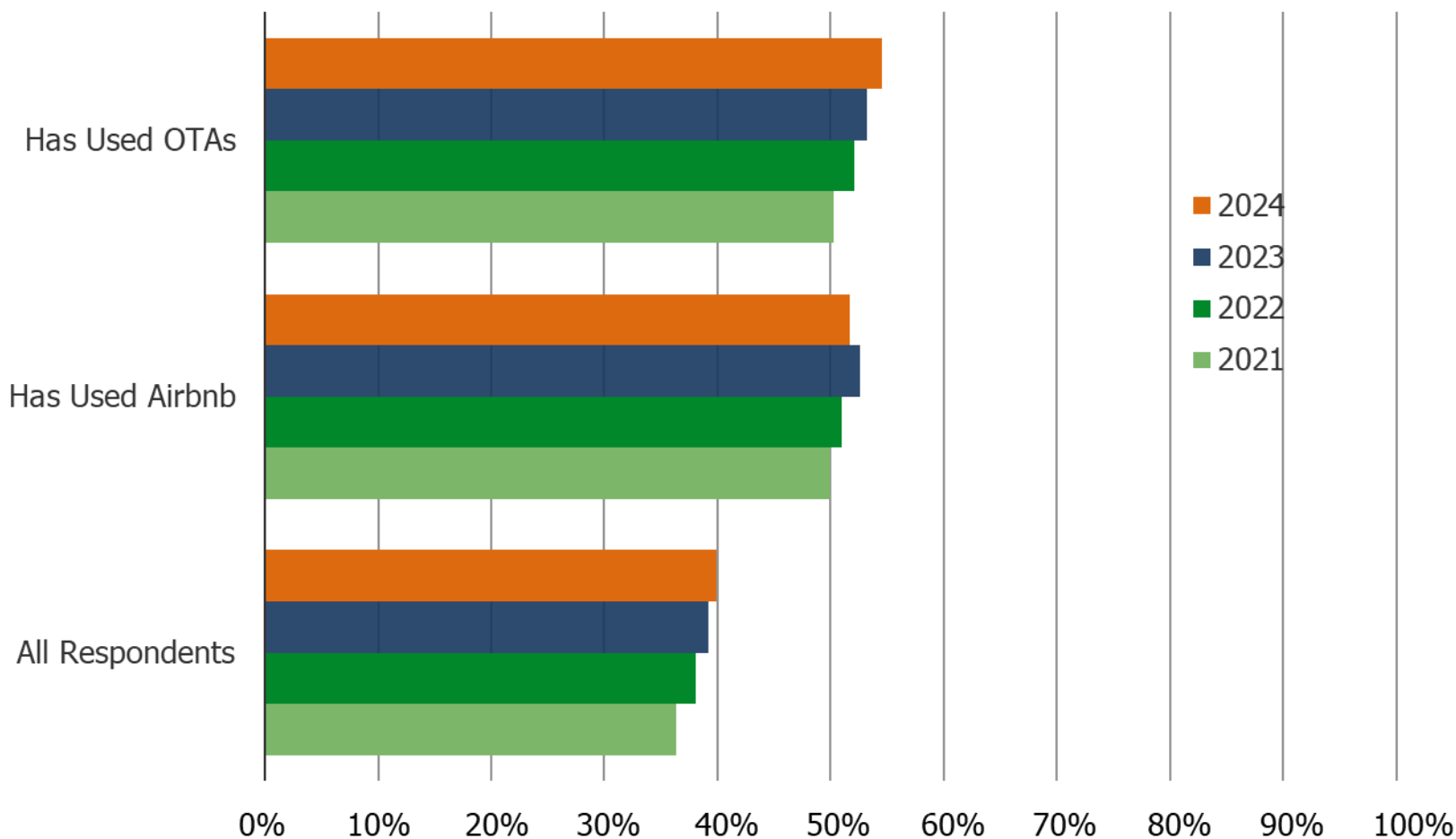
What percentage of your travel/vacation overnight stays will be booked via Airbnb in the following years...

Posed to all respondents.



What percentage of your travel/vacation overnight stays will be booked via online travel websites (ie., Expedia, Booking.com, Kayak, etc.) in the following years...

Posed to all respondents.



I

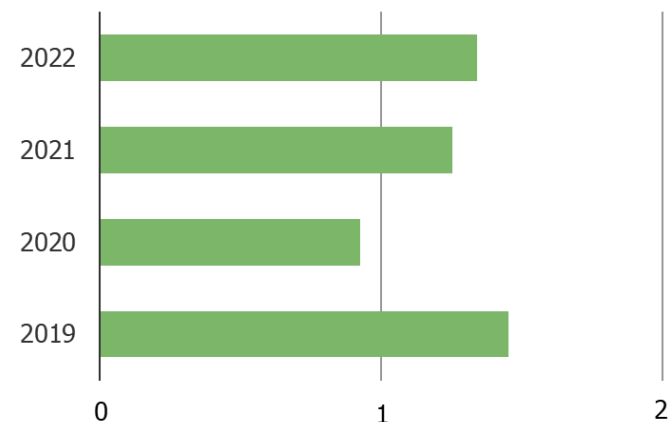
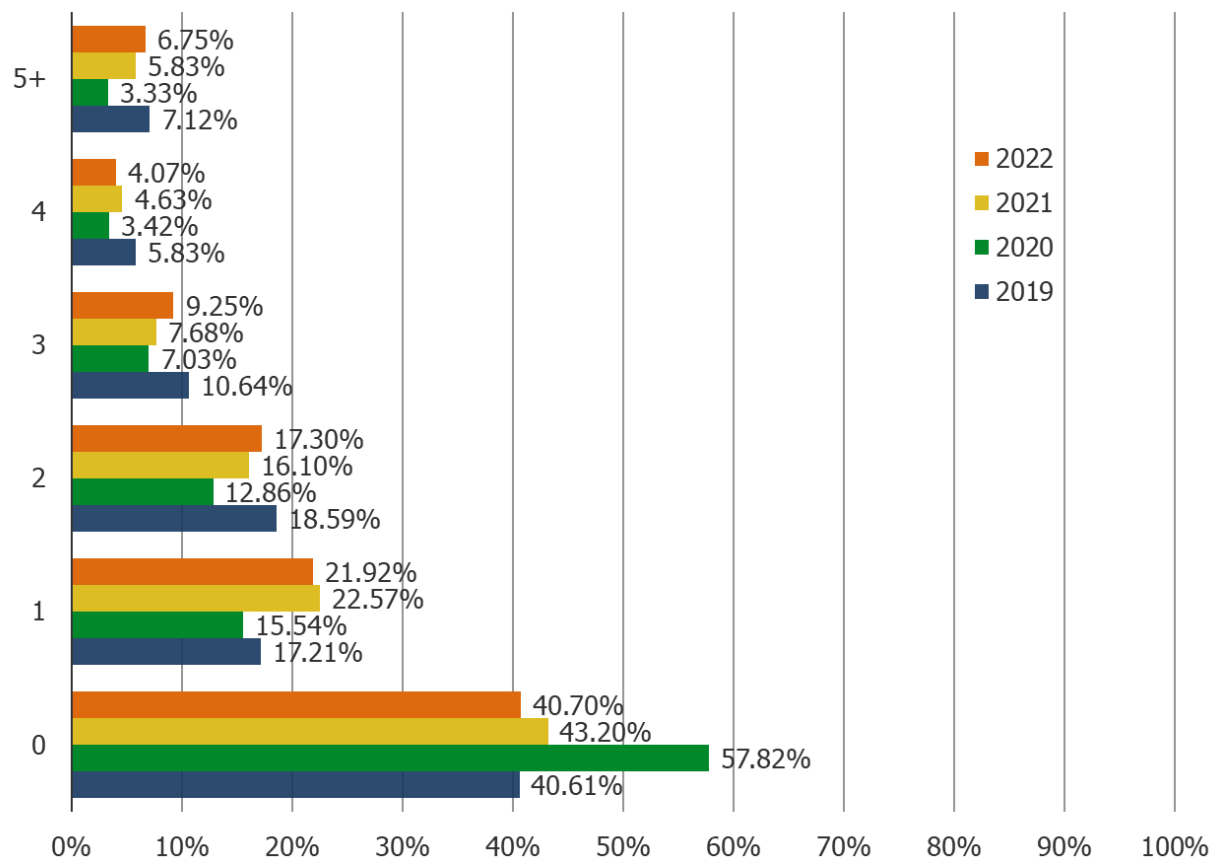
☐ AIRBNB AND COMPETITORS FEEDBACK

☐ TRAVEL TRENDS YEAR-BY-YEAR

☐ DEMOGRAPHICS AND COVID IMPACTS

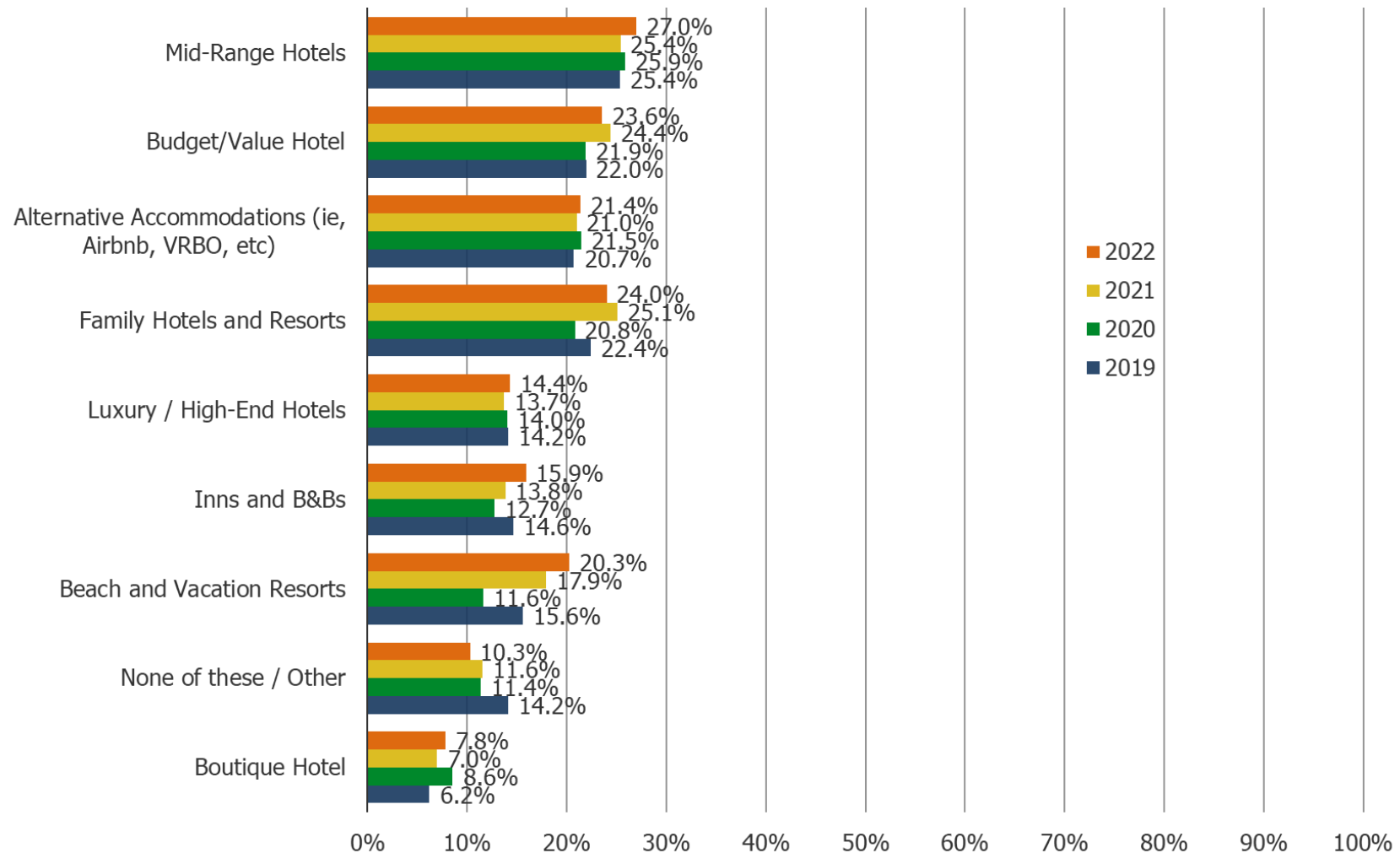
Did you/will you take any vacations in which you had to pay to spend one or more nights somewhere other than your home?

Posed to all respondents.



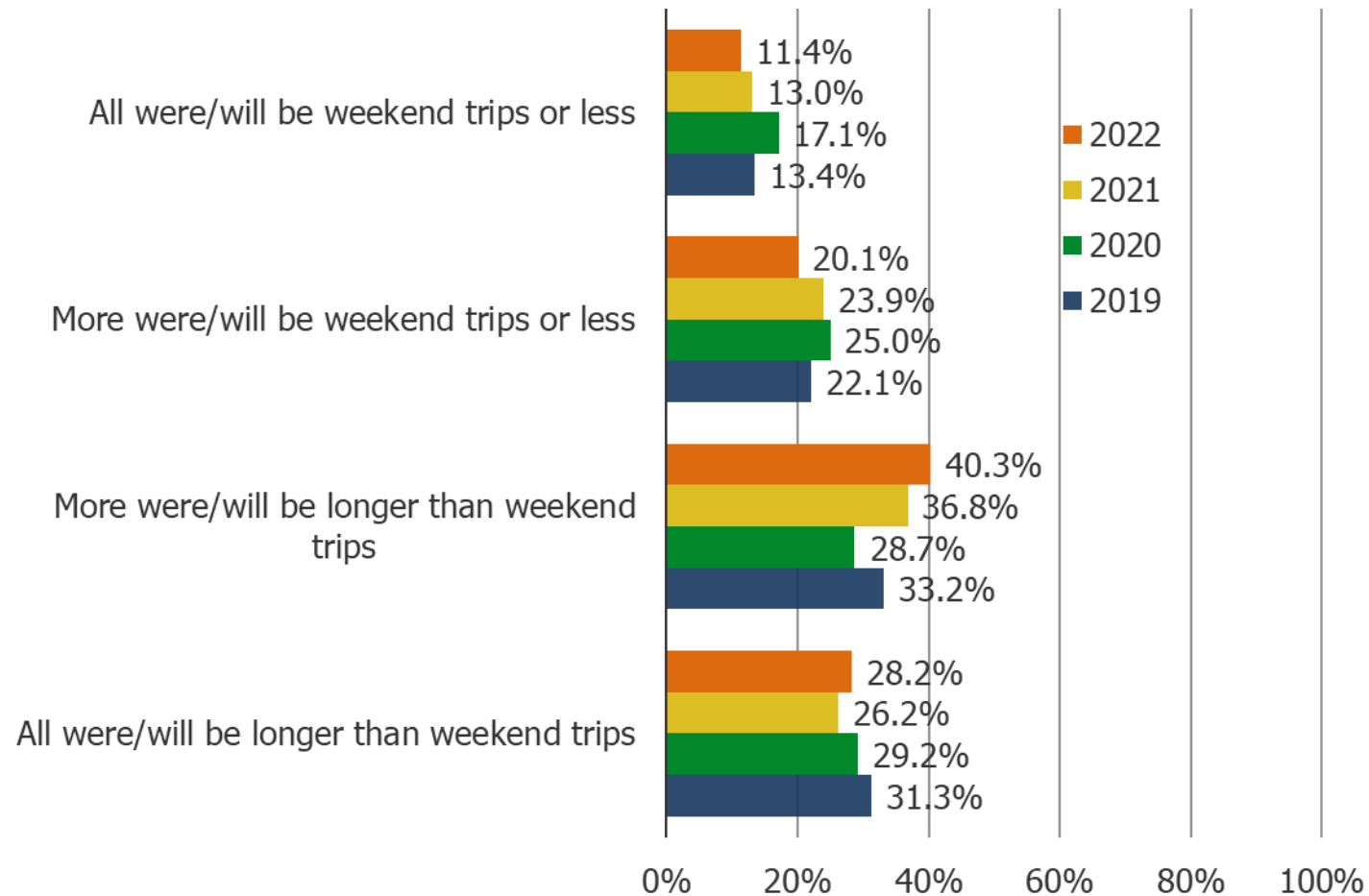
Did you/will you pay to utilize any of the following in your overnight vacations in...? (Select ALL that apply)

Posed to respondents who said they did, or will, take more than zero trips where they had to pay to stay overnight (asked separately, year-by-year).



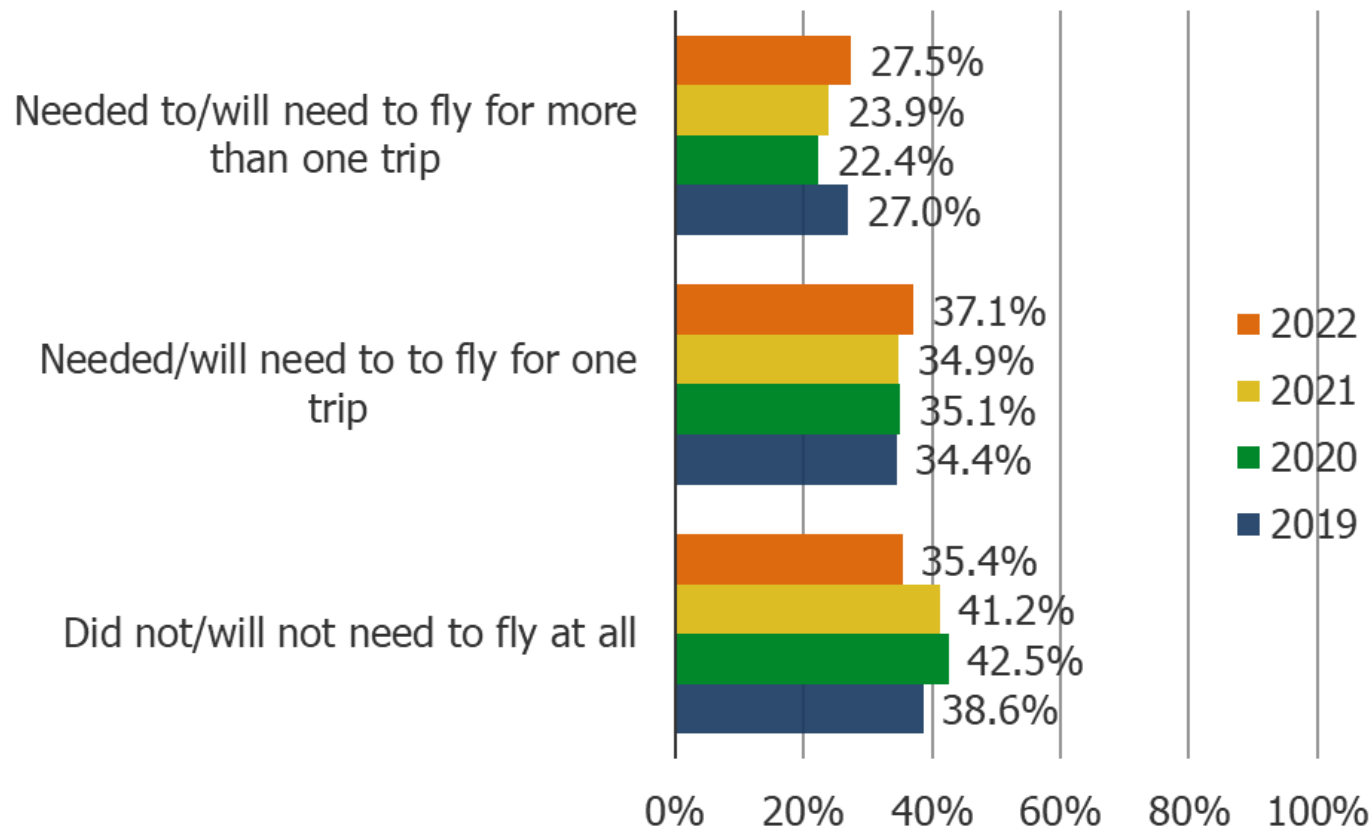
Which types of vacations did you/will you take?

Posed to respondents who said they did, or will, take more than zero trips where they had to pay to stay overnight (asked separately, year-by-year).



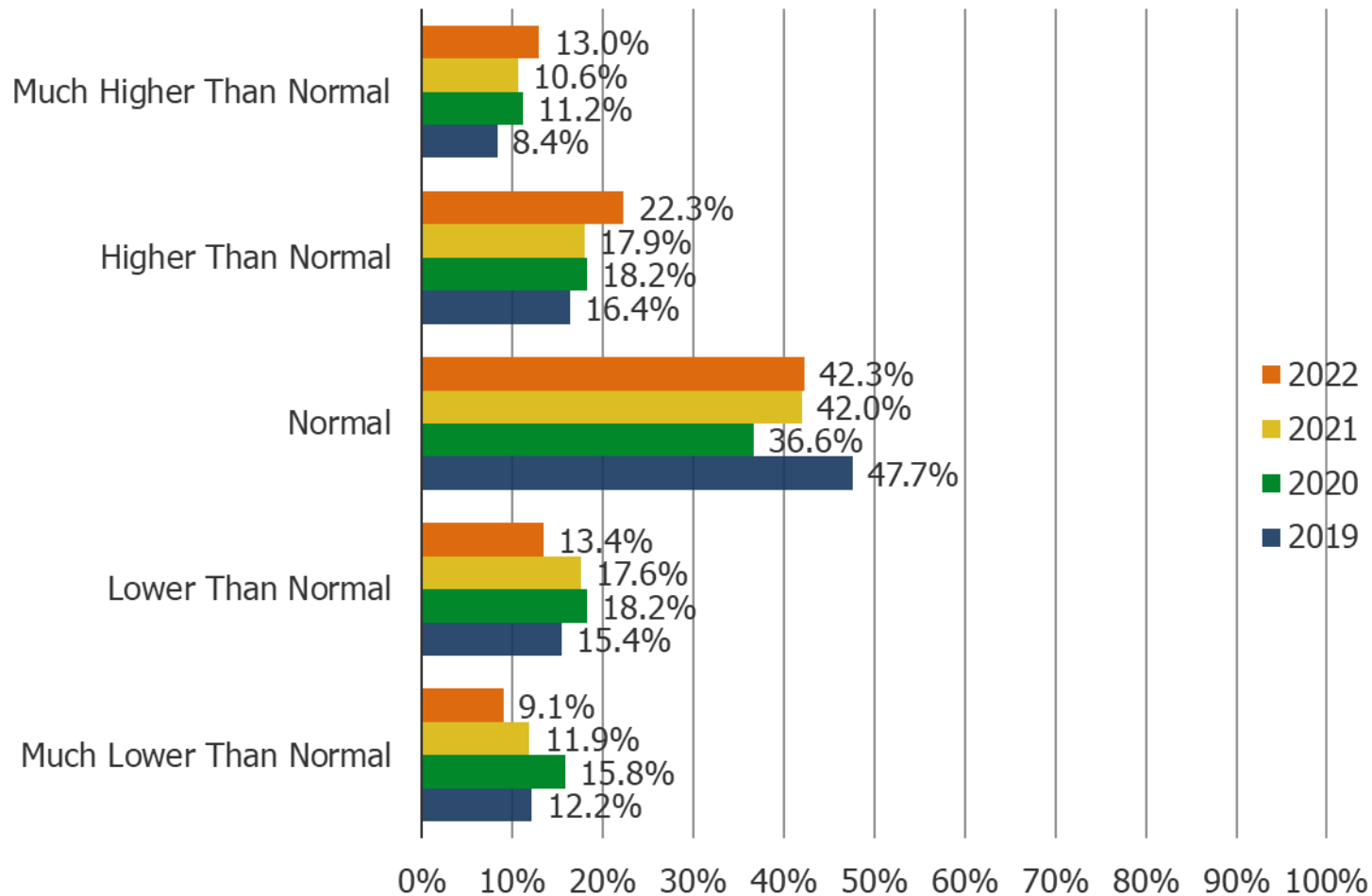
Did you/will you need to fly to go on any of your trips in...?

Posed to respondents who said they did, or will, take more than zero trips where they had to pay to stay overnight (asked separately, year-by-year).



How did/will your budget for overnight vacations compare with normal years?

Posed to respondents who said they did, or will, take more than zero trips where they had to pay to stay overnight (asked separately, year-by-year).

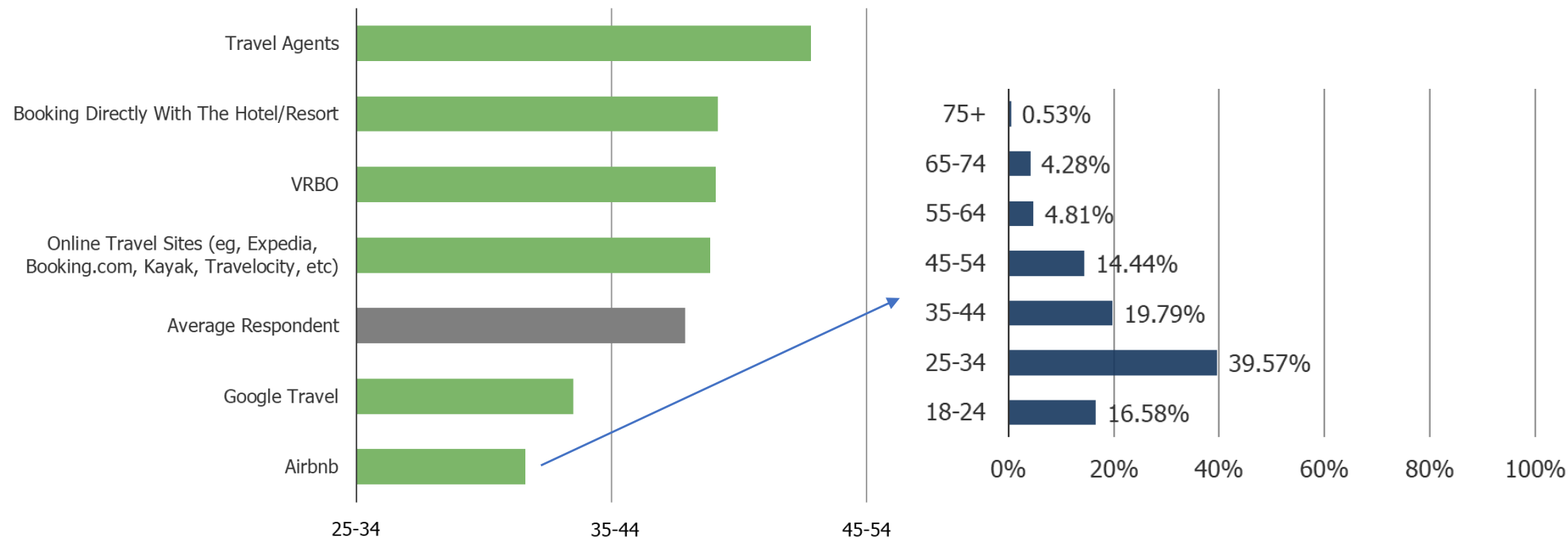


I

- ☐ AIRBNB AND COMPETITORS FEEDBACK
- ☐ TRAVEL TRENDS YEAR-BY-YEAR
- ☐ DEMOGRAPHICS AND COVID IMPACTS

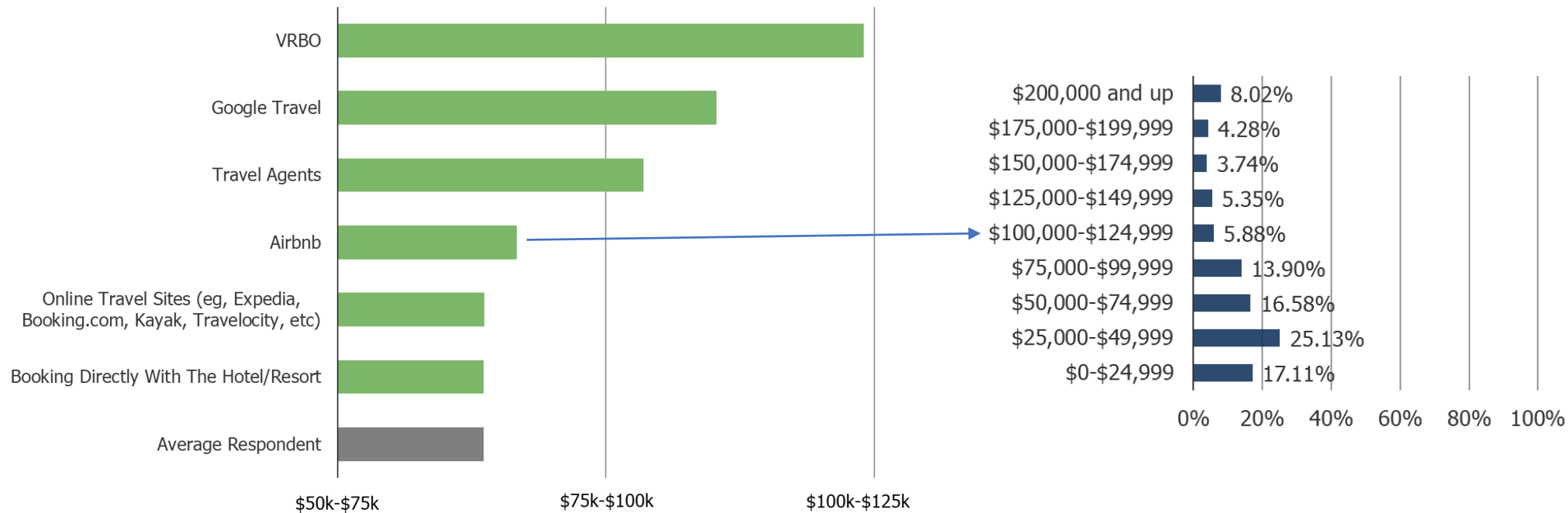
What is your age?

Posed to respondents who have used each of the following:



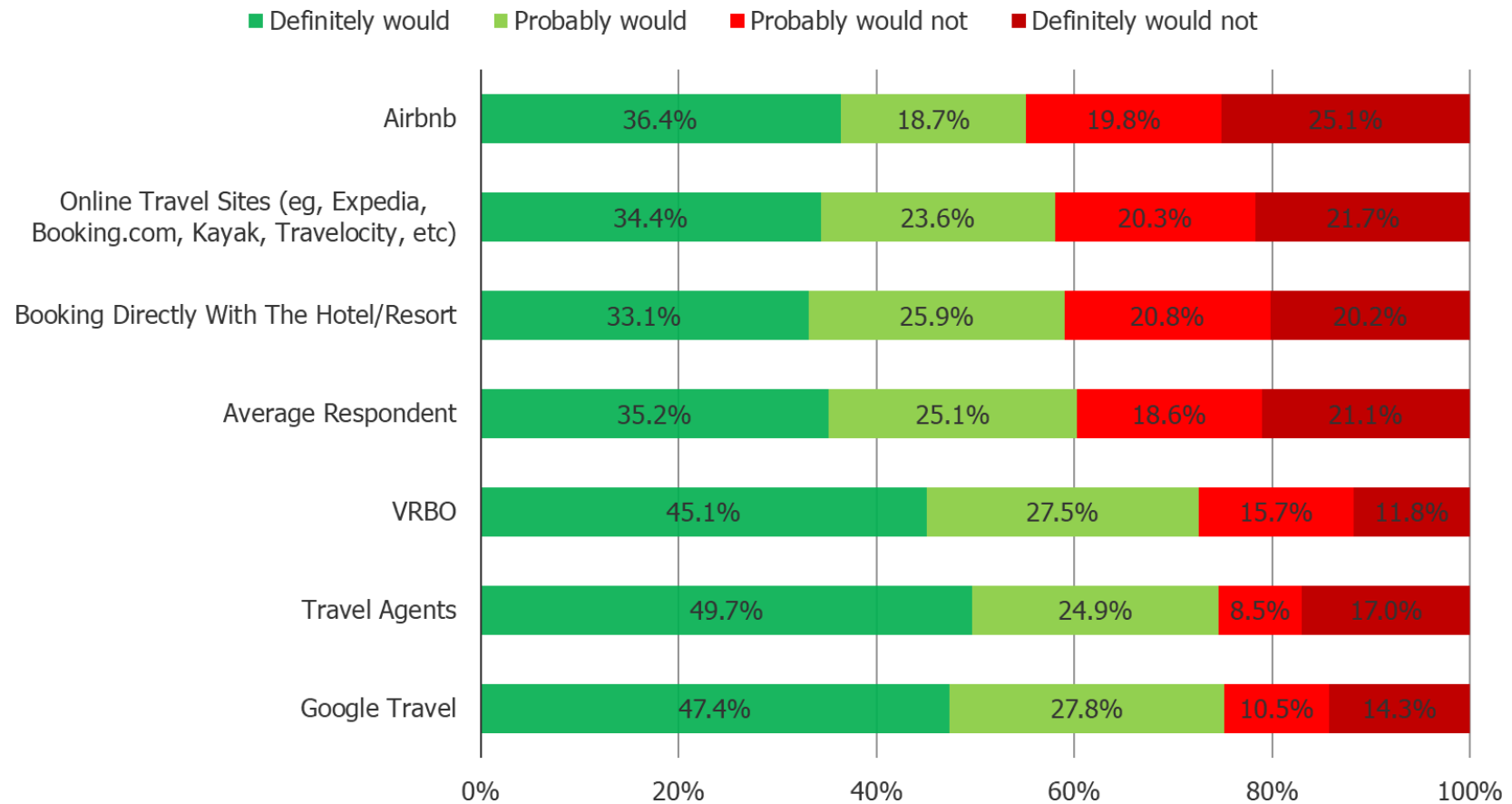
What is your age?

Posed to respondents who have used each of the following:



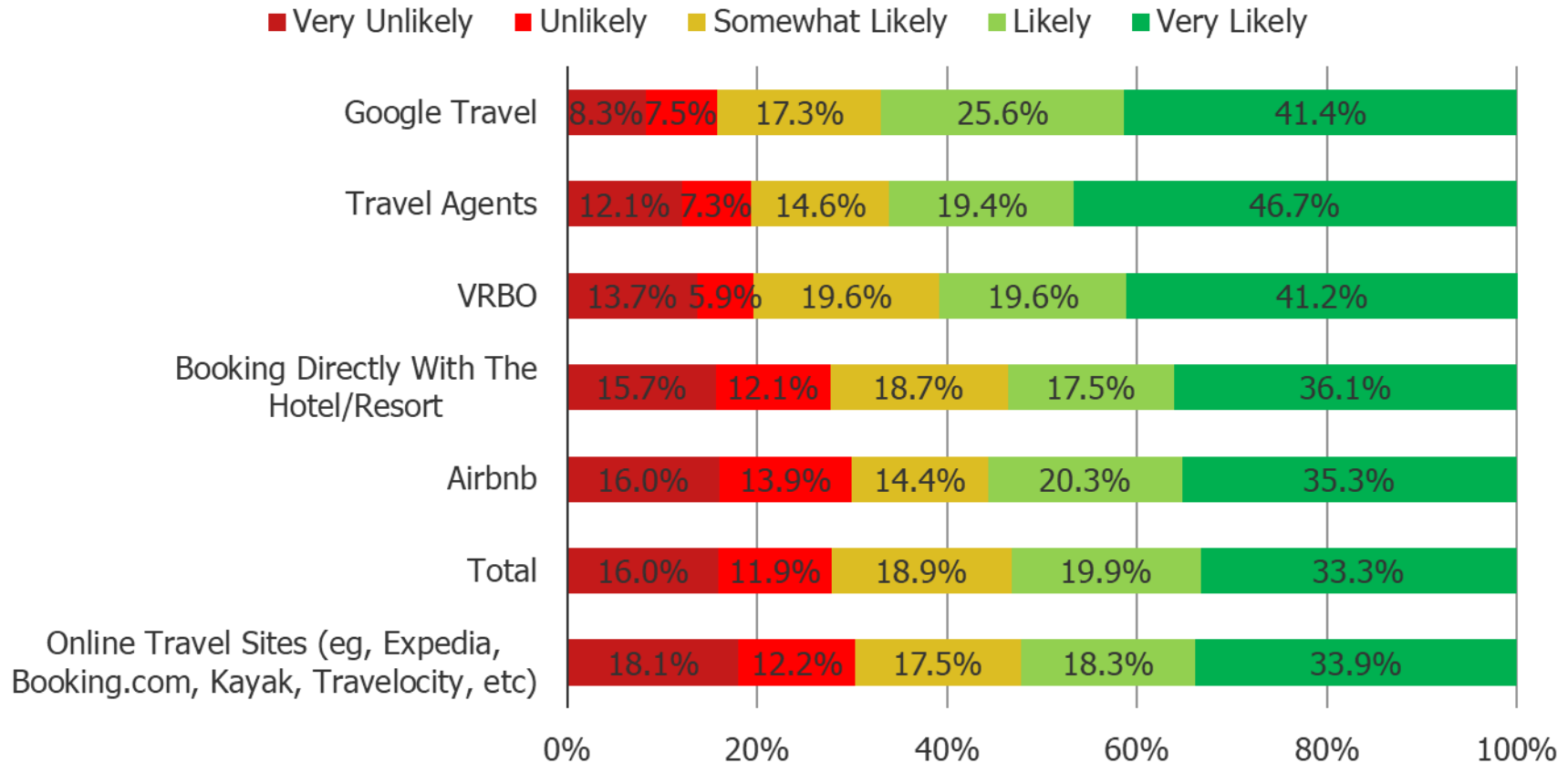
If you were offered the opportunity to take the Covid vaccine today, would you take it?

Posed to respondents who have used each of the following:



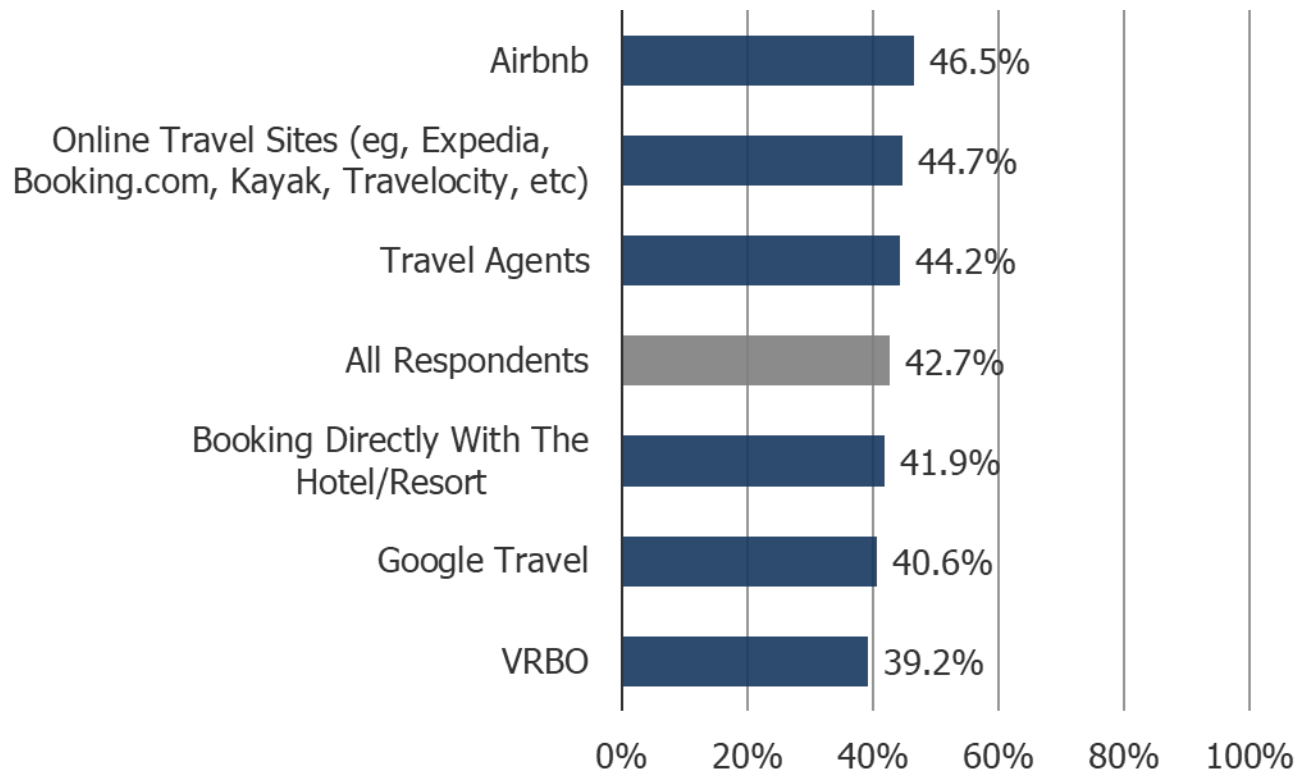
How likely is it that you will get the Covid vaccine at some point in 2021?

Posed to respondents who have used each of the following:



Did you have to delay, postpone, or cancel any vacation that you would have taken in 2020 if not for the pandemic?

Posed to respondents who have used each of the following:



Do you expect to try to re-schedule the vacation in the future?

Posed to respondents who have used each of the following and had to cancel or postpone a vacation in 2020:

