

BESPOKE SURVEYS

ABNB / Travel, Volume 12

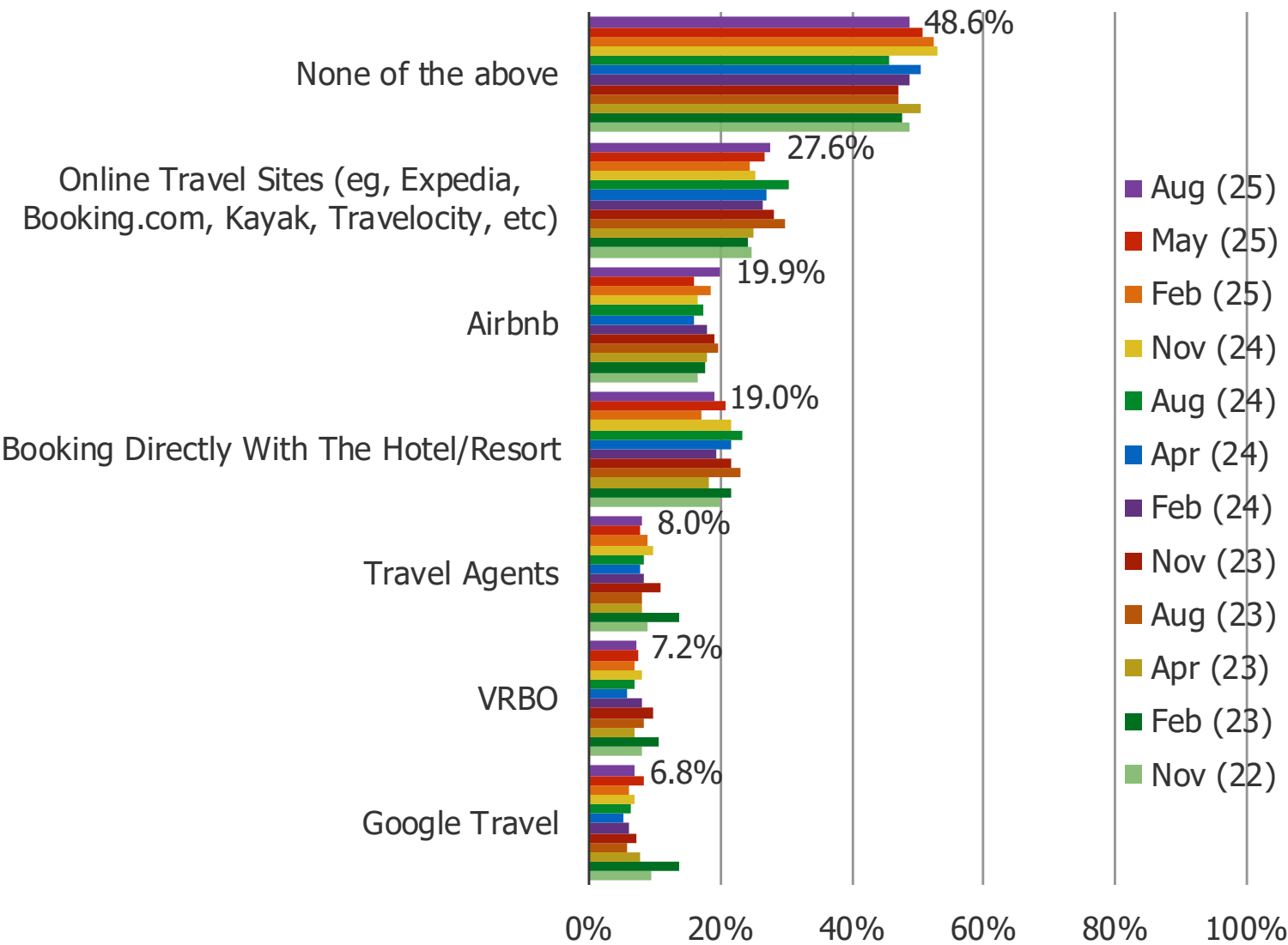
1,000 US Consumers Balanced to Census

Tickers Covered: ABNB, EXPE, BKNG

August 2025

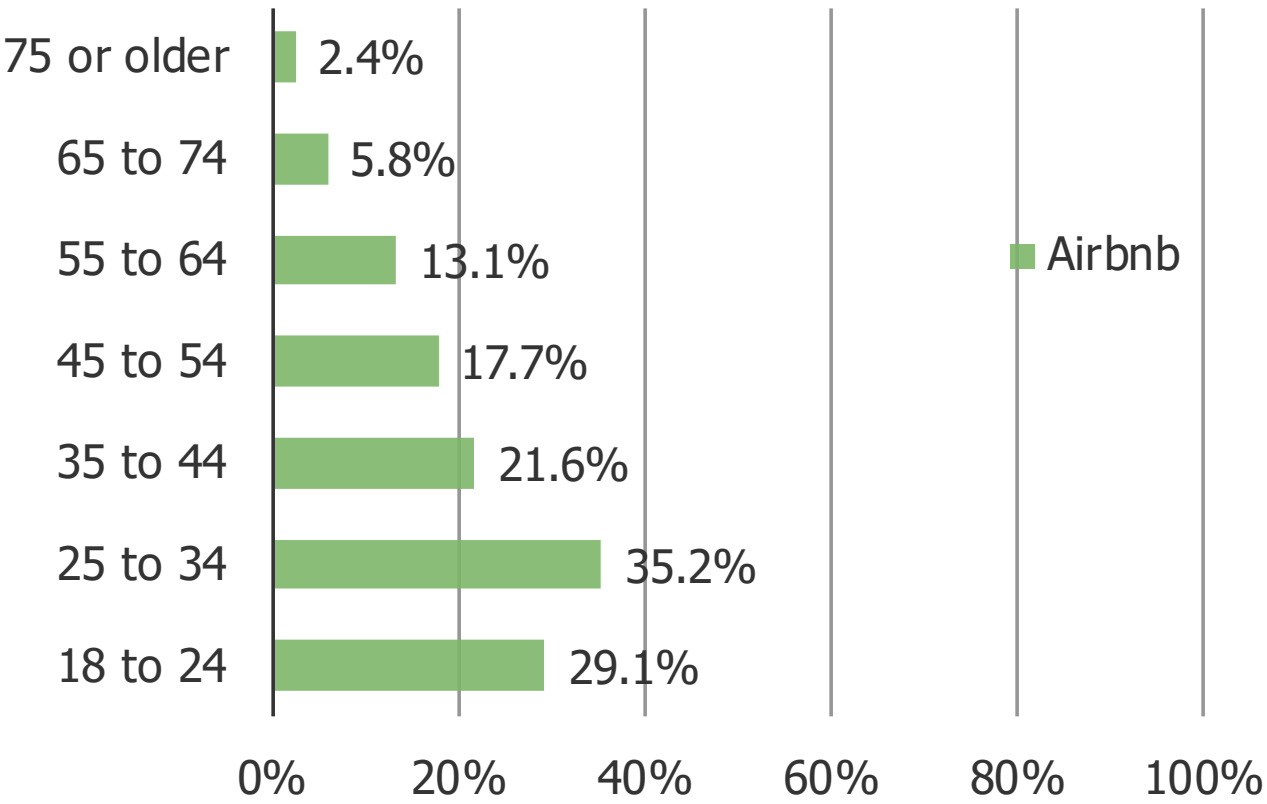
HAVE YOU EVER BOOKED OVERNIGHT TRAVEL THROUGH ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.



% OF CONSUMERS FROM EACH AGE BAND WHO HAVE EVER BOOKED TRAVEL / STAYS THROUGH AIRBNB

Posed to all respondents.

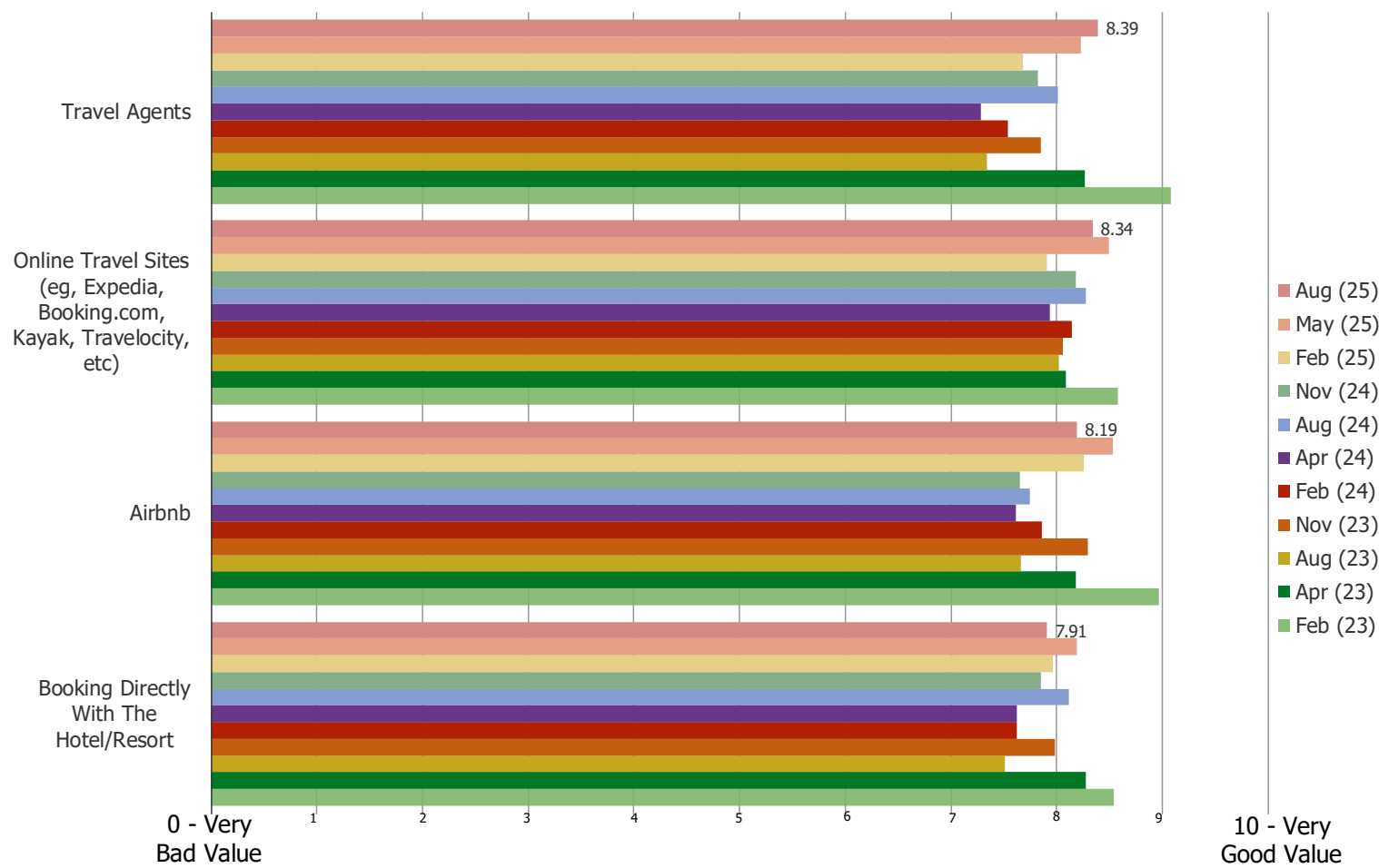


Posed to all respondents who have booked an overnight travel/stay through Airbnb.



IF YOU WERE BOOKING OVERNIGHT STAYS THROUGH THE FOLLOWING TODAY, WOULD YOU EXPECT PRICES TO BE...

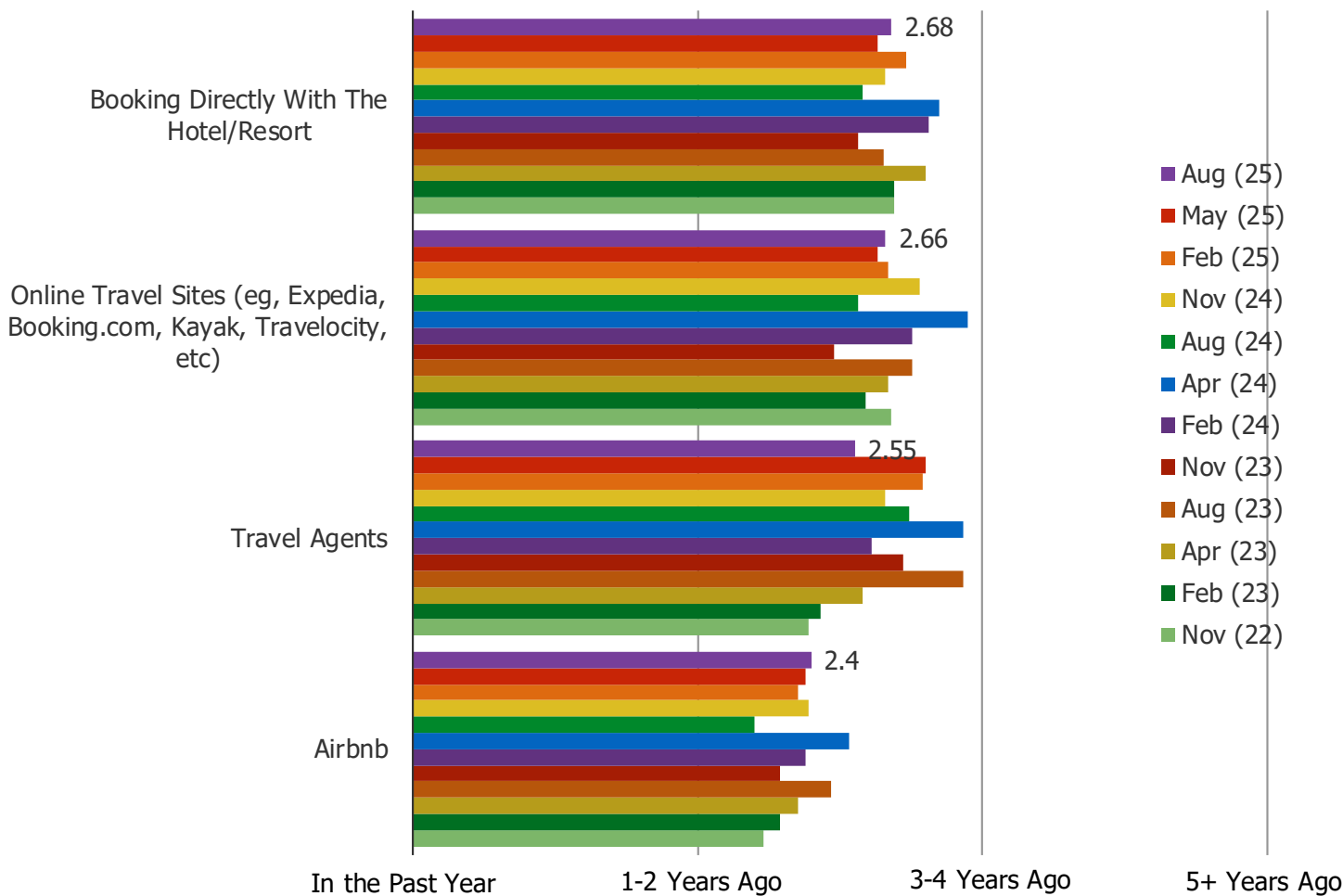
Posed to all respondents who have booked an overnight travel/stay through the below.



	N=
VRBO	76
Google Travel	72
Travel Agents	84
Airbnb	210
Booking Directly With The Hotel/Resort	200
Online Travel Sites	291

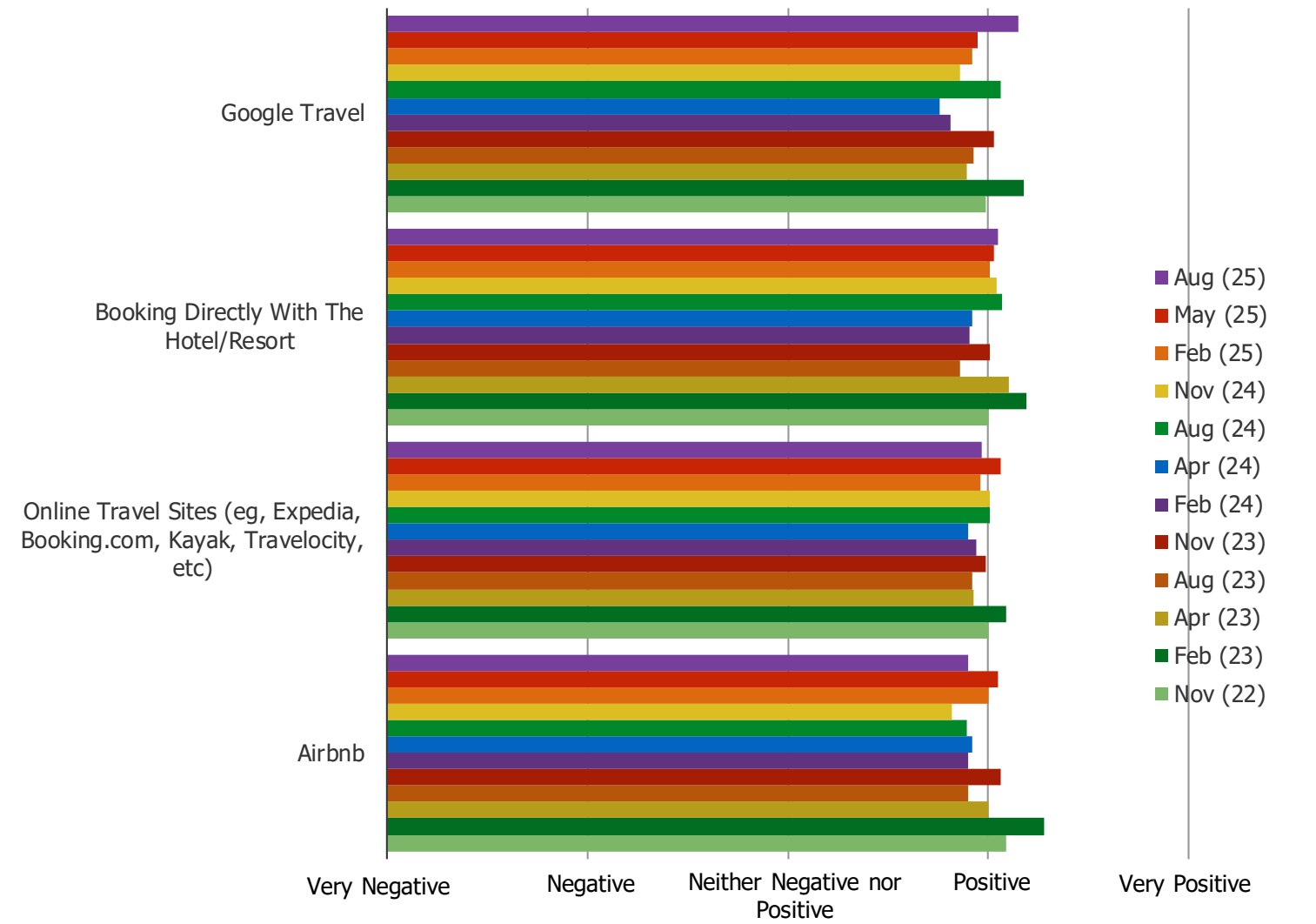
WHEN DID YOU USE THE FOLLOWING FOR THE FIRST TIME?

Posed to all respondents who have booked an overnight travel/stay through the below.



WHAT IS YOUR OVERALL OPINION OF THE FOLLOWING?

Posed to all respondents who have booked an overnight travel/stay through the below.



	N=
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IN RECENT YEARS, HAVE YOU CHANGED HOW OFTEN YOU USE THE FOLLOWING?

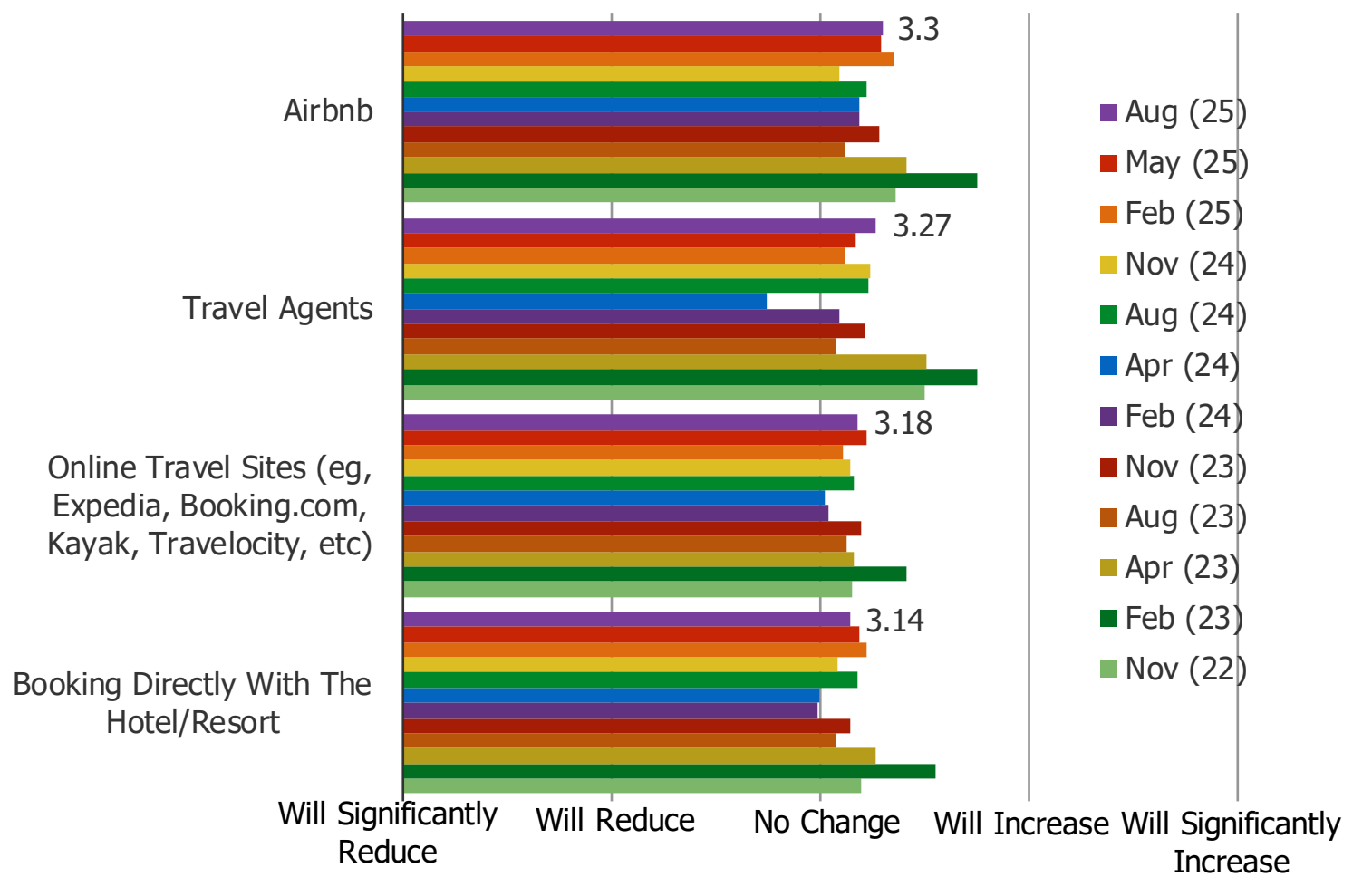
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GOING FORWARD, DO YOU EXPECT TO CHANGE HOW OFTEN YOU USE THE FOLLOWING?

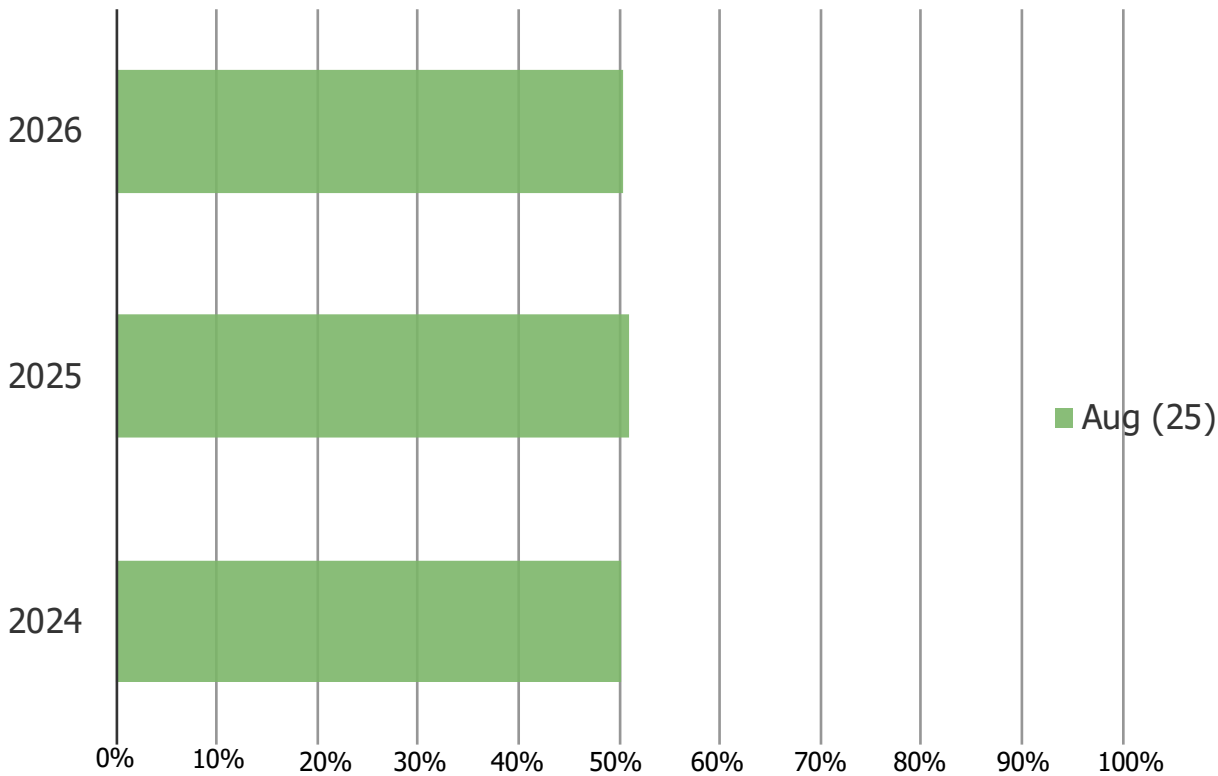
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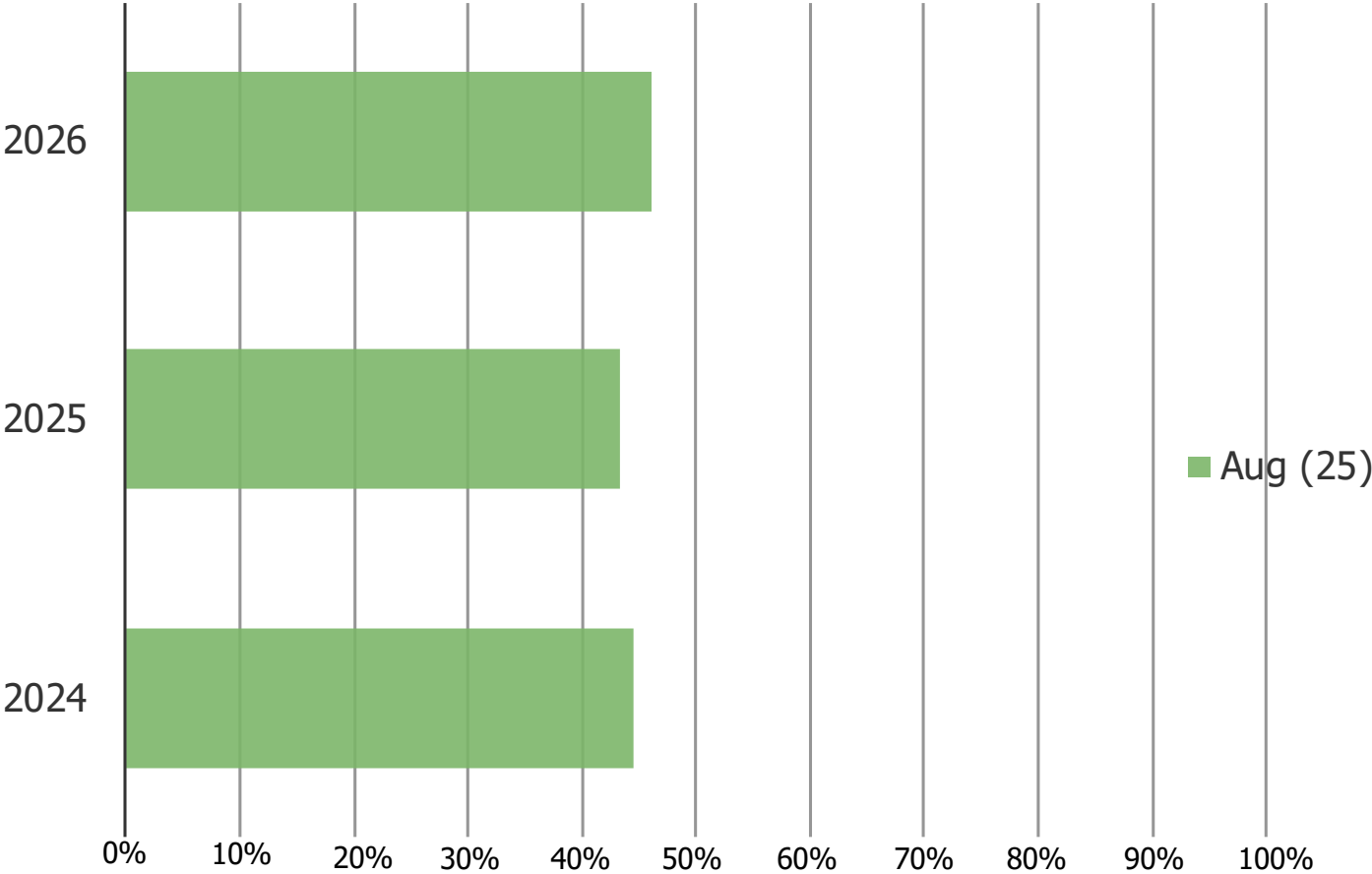
WHAT PERCENTAGE OF YOUR TRAVEL/VACATION OVERNIGHT STAYS WILL BE BOOKED VIA AIRBNB IN THE FOLLOWING YEARS?

Focusing on respondents who have previously booked travel through Airbnb.



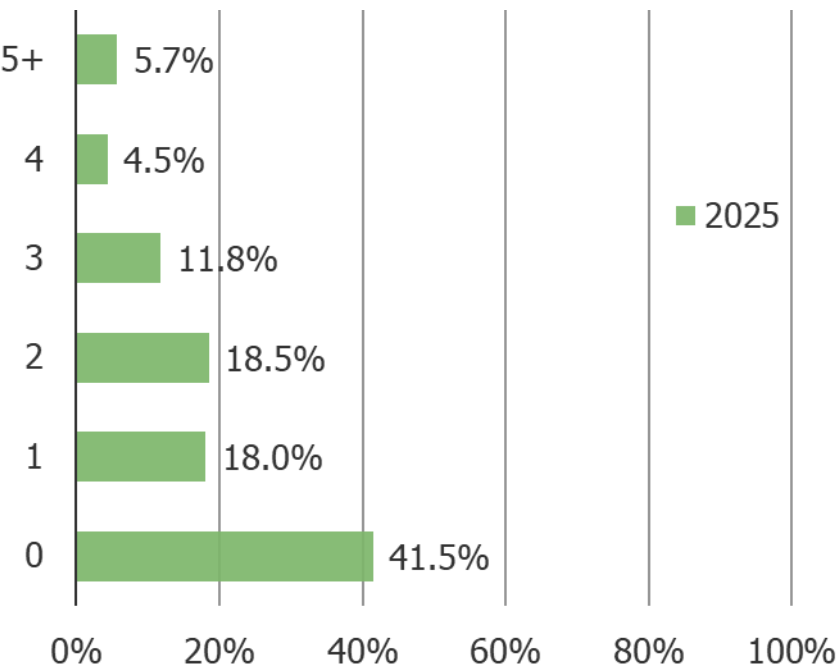
WHAT PERCENTAGE OF YOUR TRAVEL/VACATION OVERNIGHT STAYS WILL BE BOOKED VIA OTA’S IN THE FOLLOWING YEARS?

Focusing on respondents who have previously booked travel through OTAs.

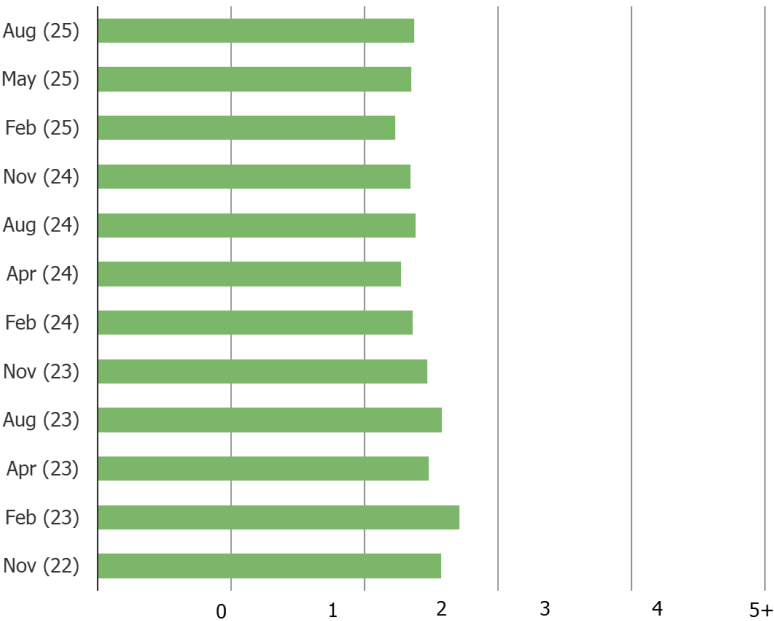


DID YOU / WILL YOU TAKE ANY VACATIONS THAT REQUIRE PAYING TO SPEND ONE OR MORE NIGHTS SOMEWHERE OTHER THAN YOUR HOME?

Posed to all respondents.

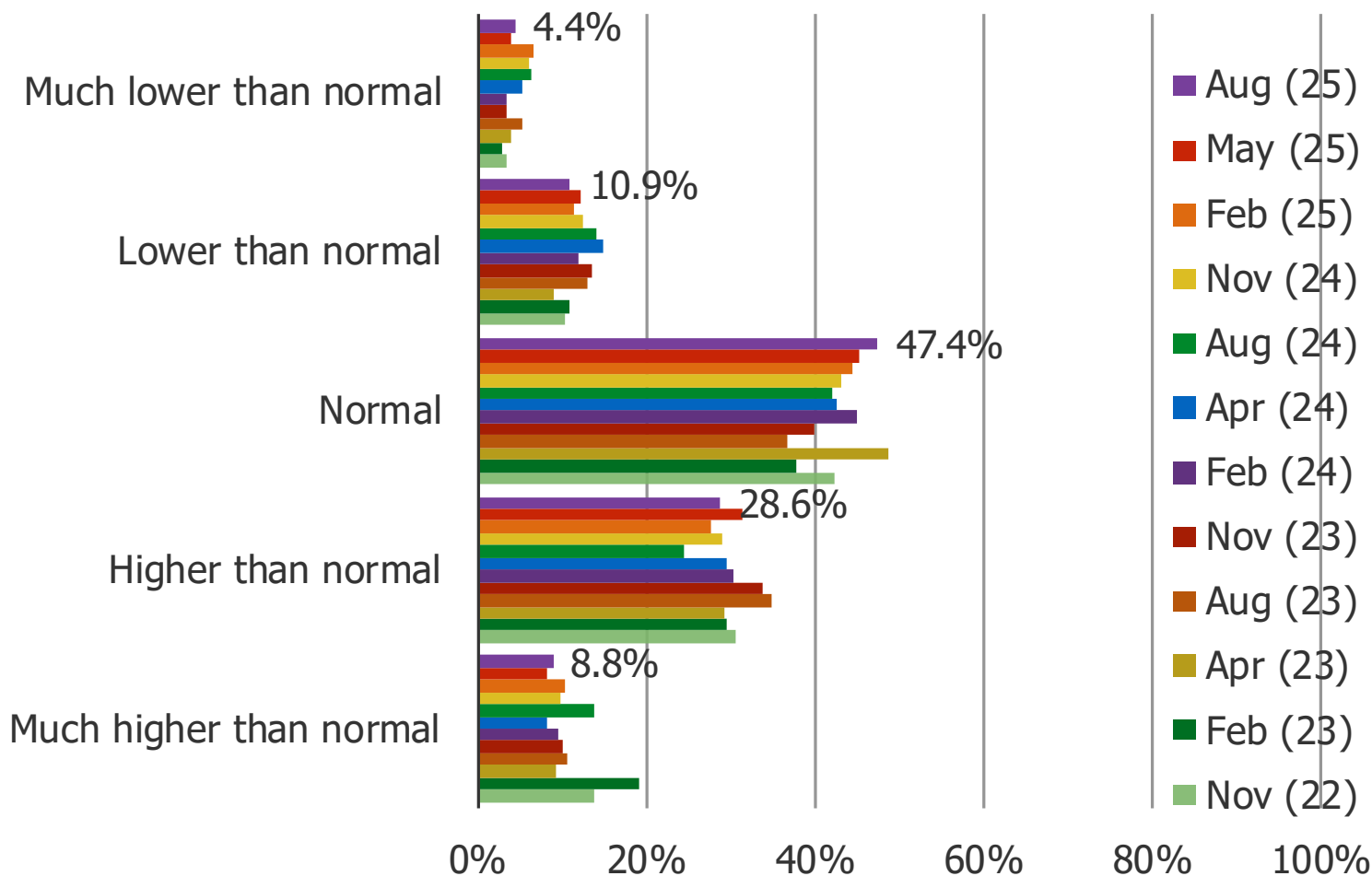


Time series (weighted average)



HOW DID/WILL YOUR BUDGET FOR OVERNIGHT VACATIONS IN 2025 COMPARE WITH NORMAL YEARS?

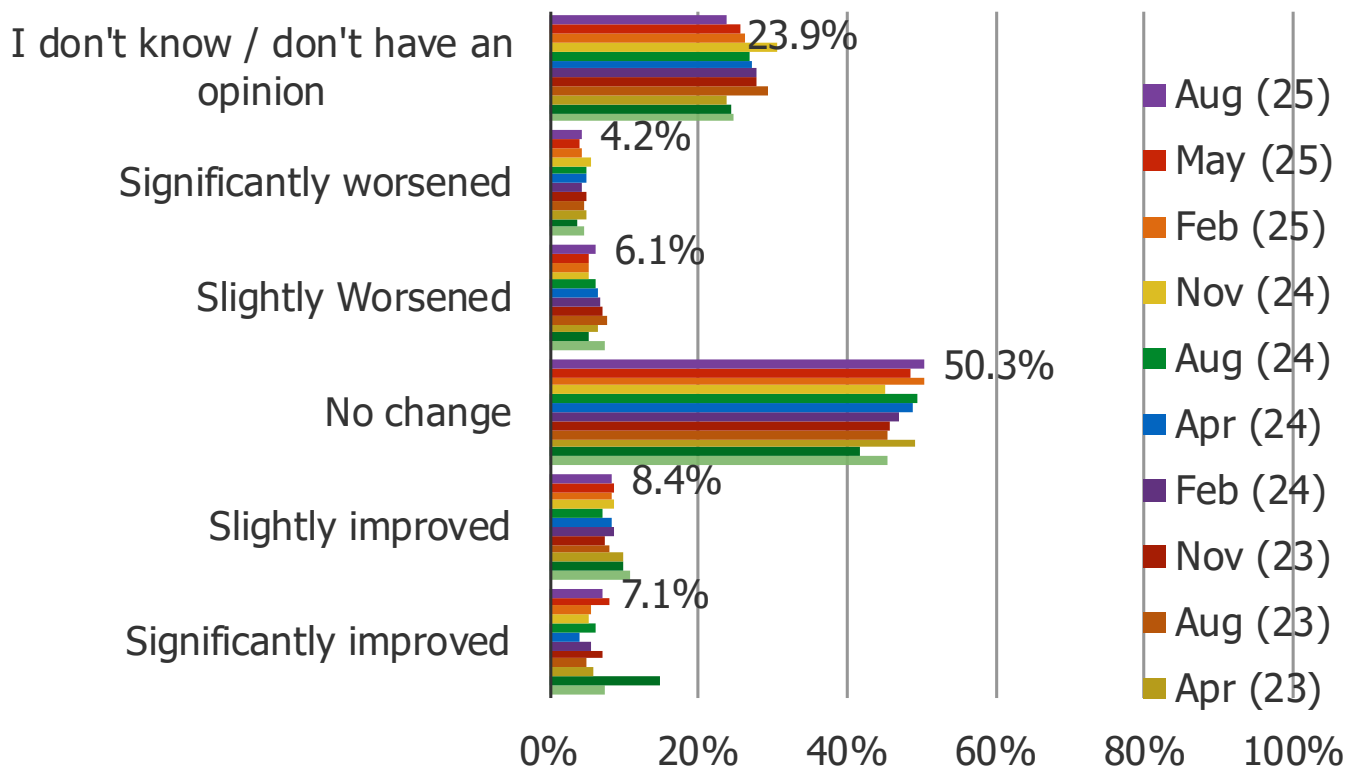
Posed to all respondents who had/have plans for overnight vacations in 2025.



Note – we changed the question text from “in 2023” to “in 2024” in 2024 and from “in 2024” to “in 2025” in 2025...

HAS YOUR OPINION OF AIRBNB CHANGED IN THE PAST 6-12 MONTHS?

Posed to all respondents.



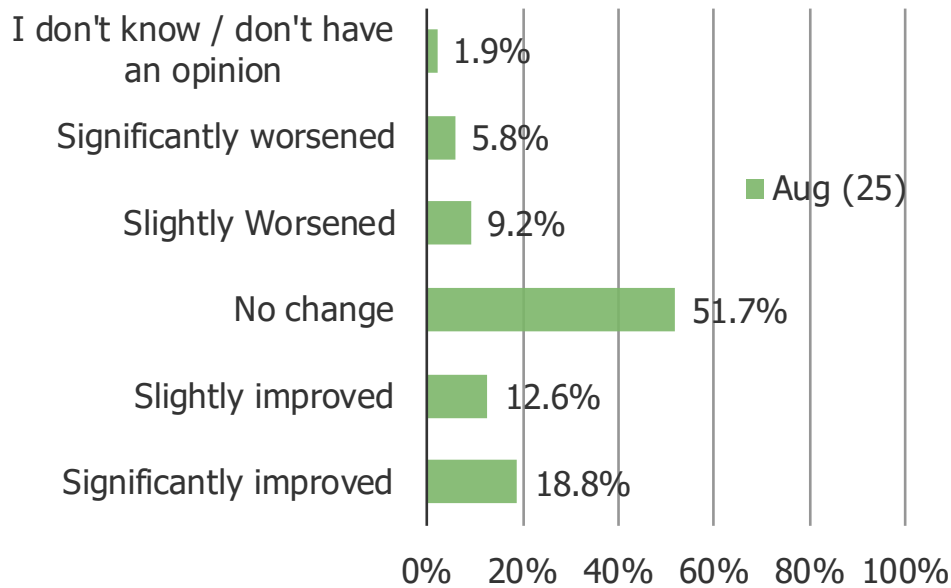
Why?

Respondents who say worsened:

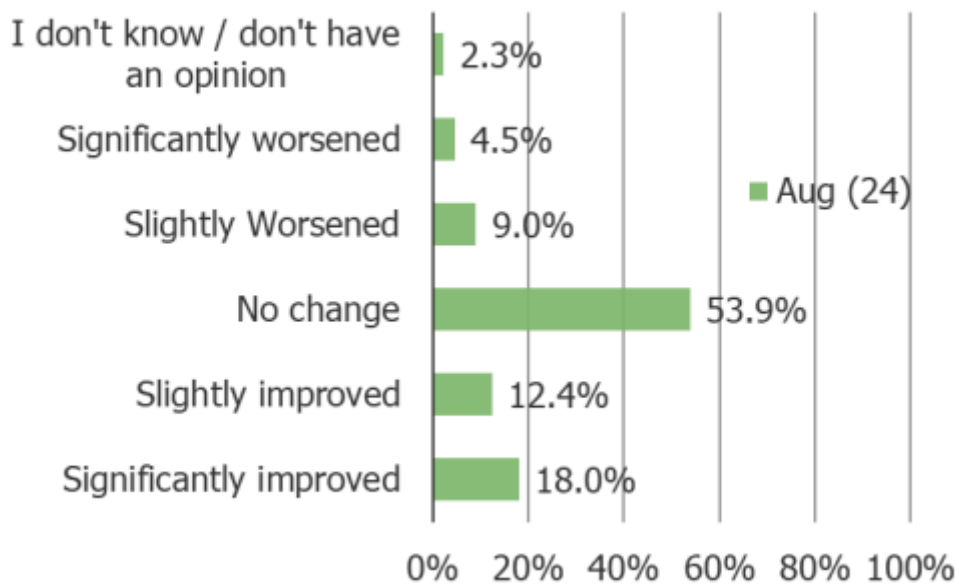
- Additional fees
- Friends had bad experiences
- Have heard stories about them
- Had a bad experience
- Not safe or comfortable
- They are out of control
- Cameras
- Hidden fees

HAS YOUR OPINION OF AIRBNB CHANGED IN THE PAST 6-12 MONTHS?

Posed to respondents who have tried Airbnb (N = 210)

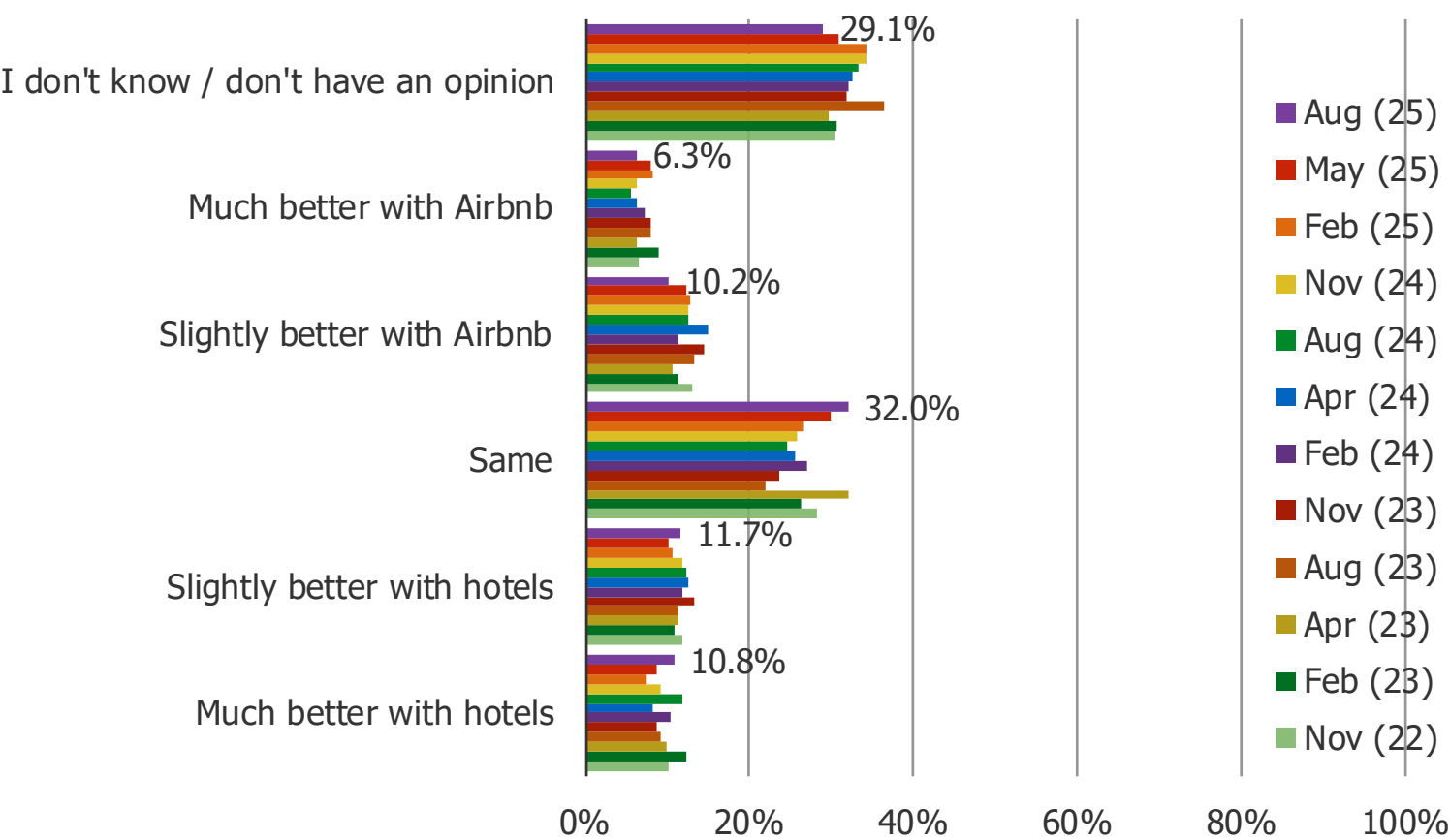


Responses from one year ago...



IN YOUR VIEW, IS THE PRICE TO VALUE BETTER WITH HOTELS OR AIRBNB?

Posed to all respondents.



Focusing on respondents who have booked travel with Airbnb...

- 11.9% said value is much better with hotels (12.36% in Aug 2024)
- 15.2% said value is slightly better with hotels (16.29% in Aug 2024)
- 28.6% said value is the same (25.28% in Aug 2024)
- 21.9% said value is slightly better with Airbnb (26.40% in Aug 2024)
- 19.1% said value is much better with Airbnb (16.85% in Aug 2024)
- 3.3% said they don't know / don't have an opinion (2.81% in Aug 2024)