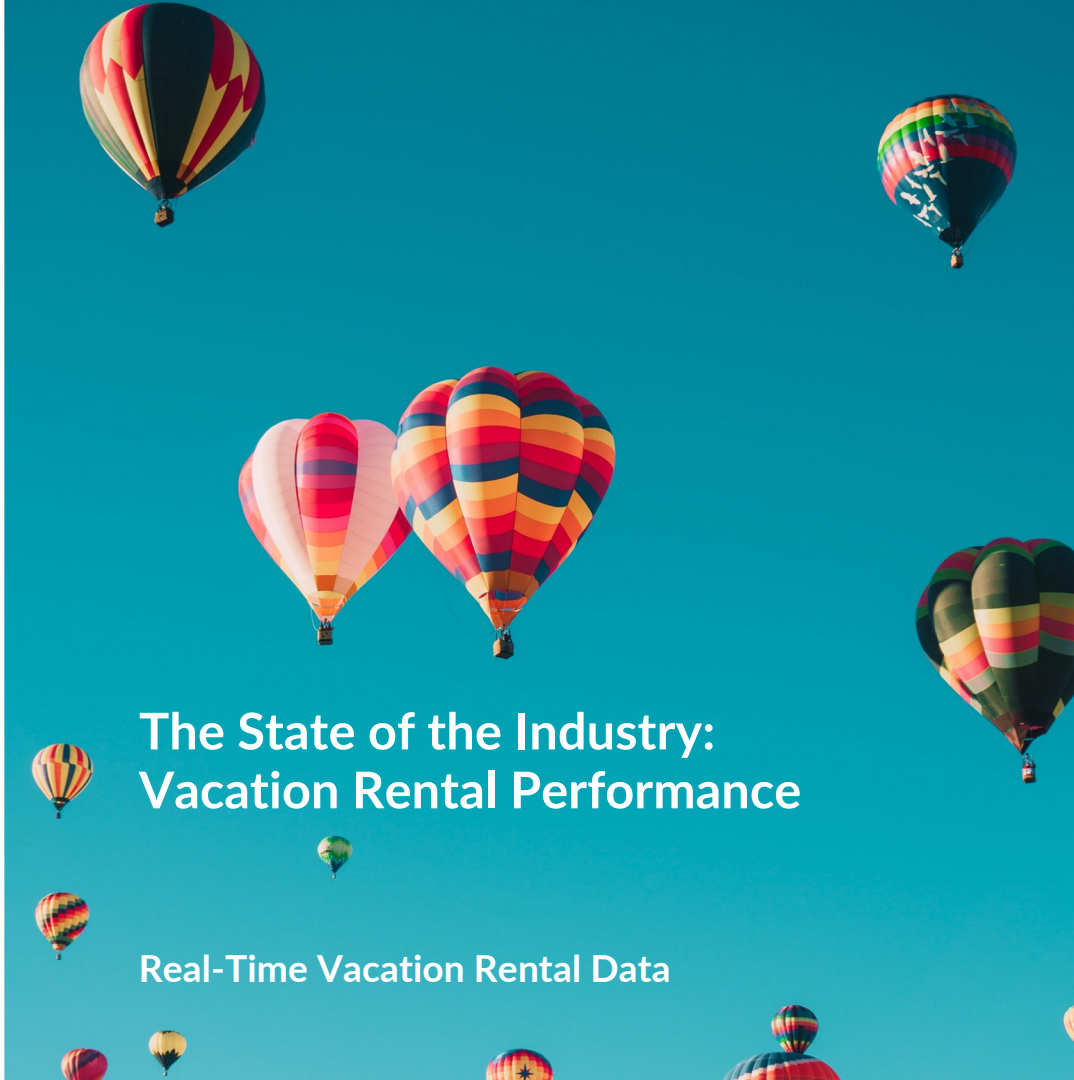
KEYDATA™



The State of the Industry: Vacation Rental Performance

Real-Time Vacation Rental Data

Prepared by Key Data Dashboard™ | © KEYDATA DASHBOARD

Melanie Brown

Director of Data and Analytics

Key Data Dashboard

melanie@keydatadashboard.com

OUR FOCUS

Key Data is the #1 trusted data & analytics provider of real-time vacation rental market data for the short-term rental industry.

Data Methodology

Through direct integrations with the **reservation systems** for vacation rental professionals, hotels and resorts around the world, Key Data aggregates historical and forward-looking data in **real time** to create the industry's most trusted source of data and analytics.

Key Data also **scrapes** the major online travel agencies (OTAs) to provide analytics on a combination of rental by owners and professionally managed properties.

OUR SERVICES

PRODATA

Professional Property Managers, Hotels + Resorts

DESTINATIONDATA

DMOs + Tourism Organizations

REALTORDATA

Realtors + Property Managers

HOSTDATA

Airbnb Hosts + Rent by Owner

TRENDDATA

Trend Reports

ENTERPRISEDATA

Custom Data + API Solutions

PROVIDE

BETTER

DATA

TOGETHER

The State of the Industry

Let’s dive in.

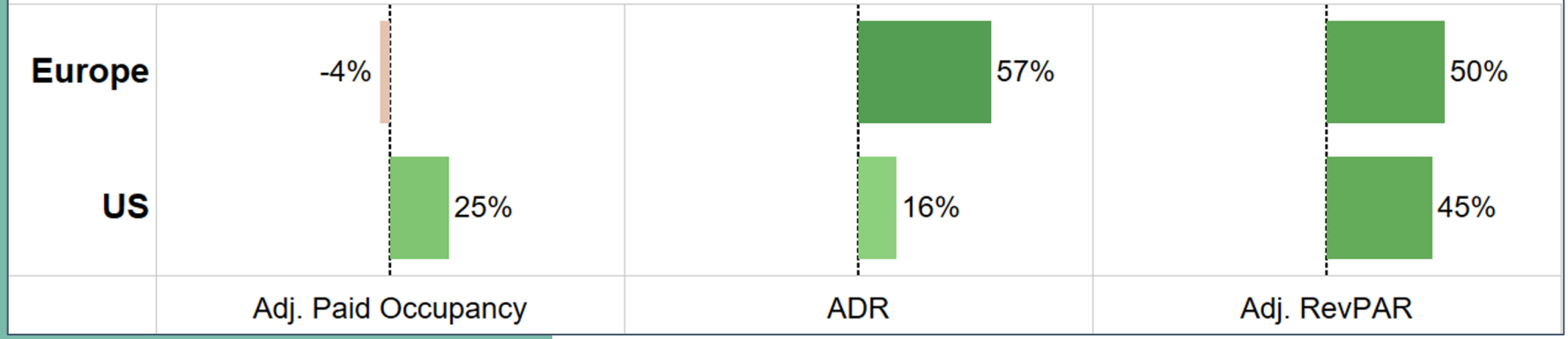
The State of the Industry

1. Overall Performance
2. Booking Patterns
3. Unit Types
4. Looking Ahead

% Change in Key Metrics

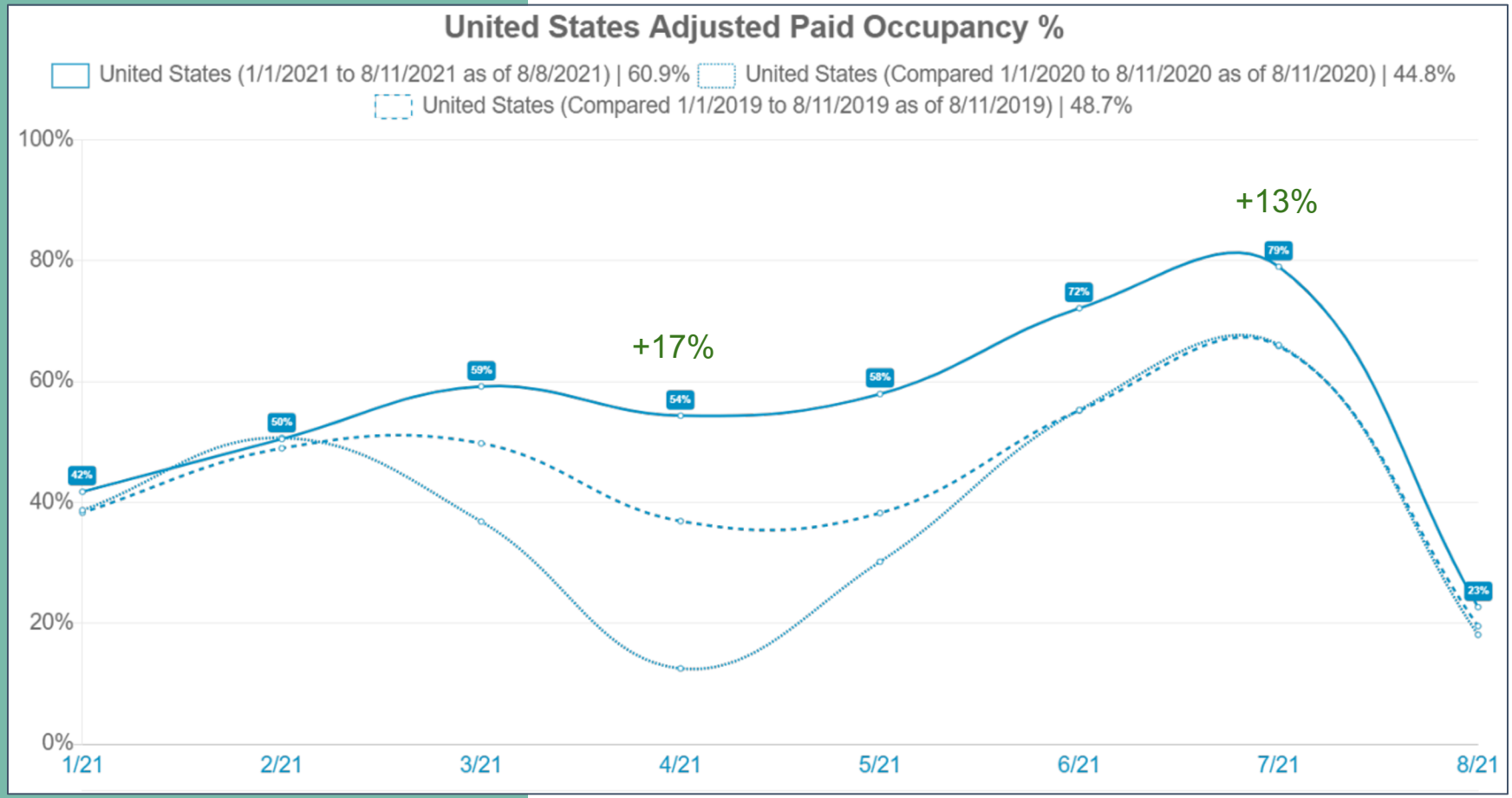
2021 YTD vs 2019 YTD as of August 10

KEYDATA™

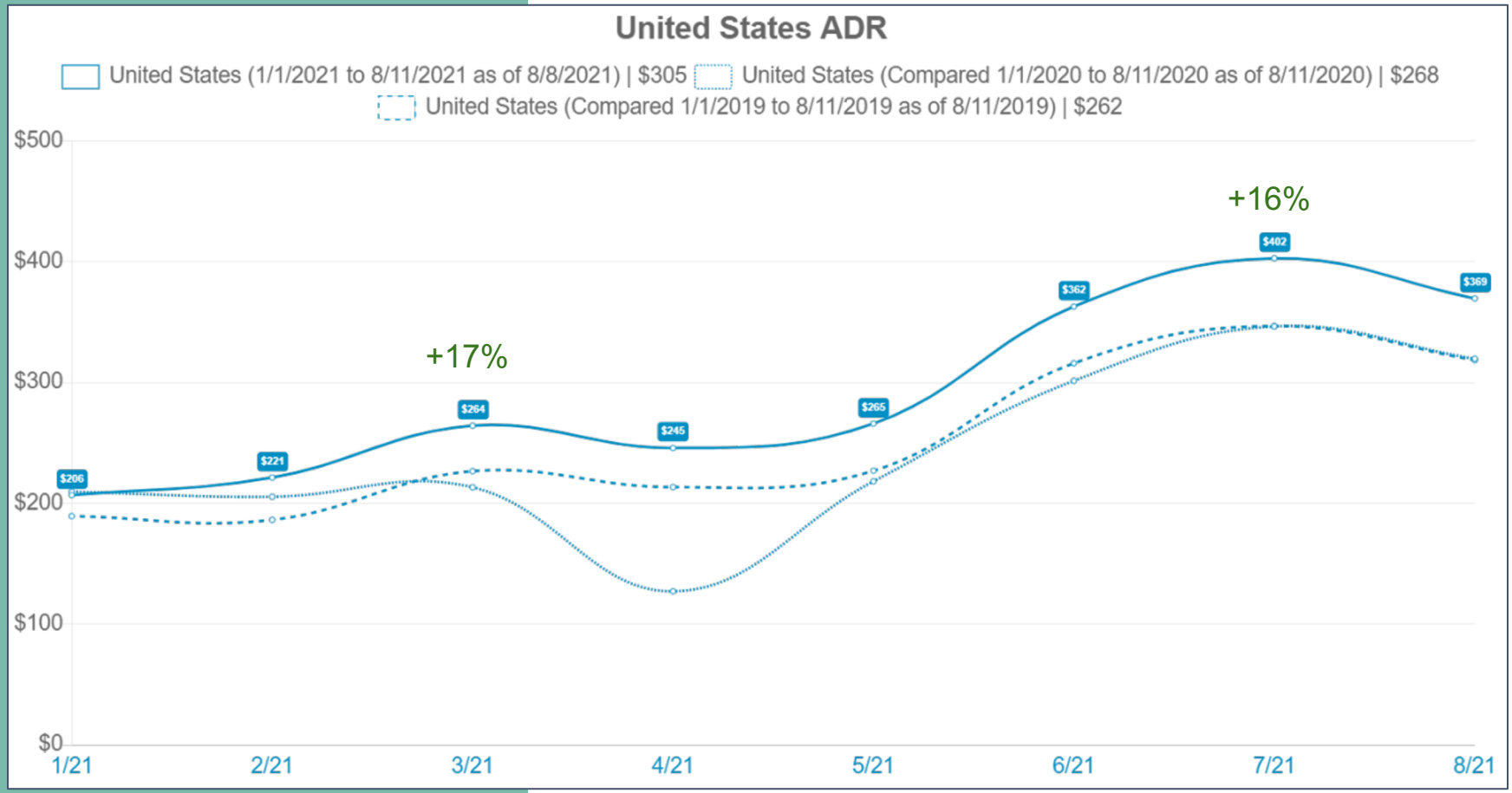


KEYDATA™

United States Adjusted Paid Occupancy %

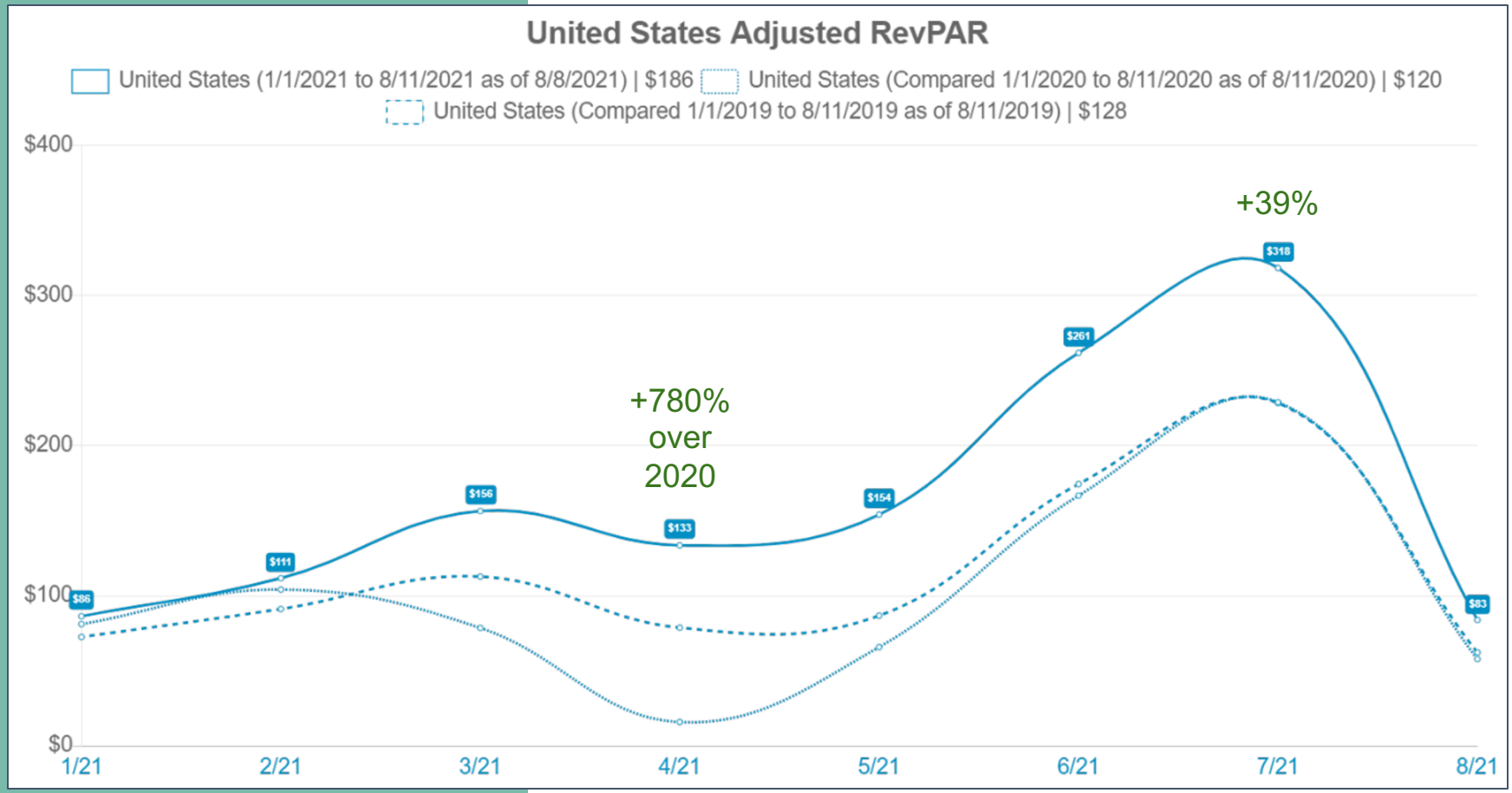


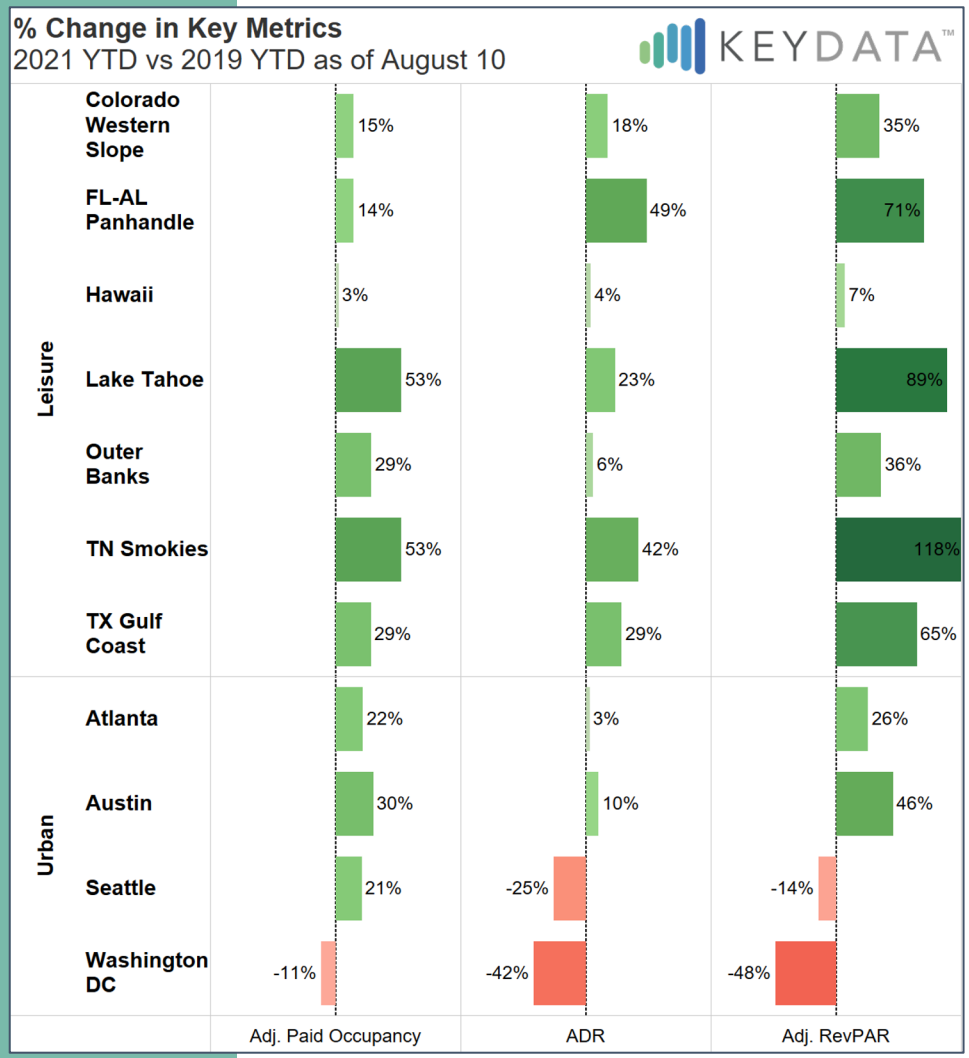
KEYDATA™


United States ADR
United States (1/1/2021 to 8/11/2021 as of 8/8/2021) | $305
United States (Compared 1/1/2020 to 8/11/2020 as of 8/11/2020) | $268
United States (Compared 1/1/2019 to 8/11/2019 as of 8/11/2019) | $262
$500
$400
$300
$200
$100
$0
1/21
2/21
3/21
4/21
5/21
6/21
7/21
8/21
$206
$221
$264
$245
$265
$362
$402
$369
+17%
+16%

KEYDATA™

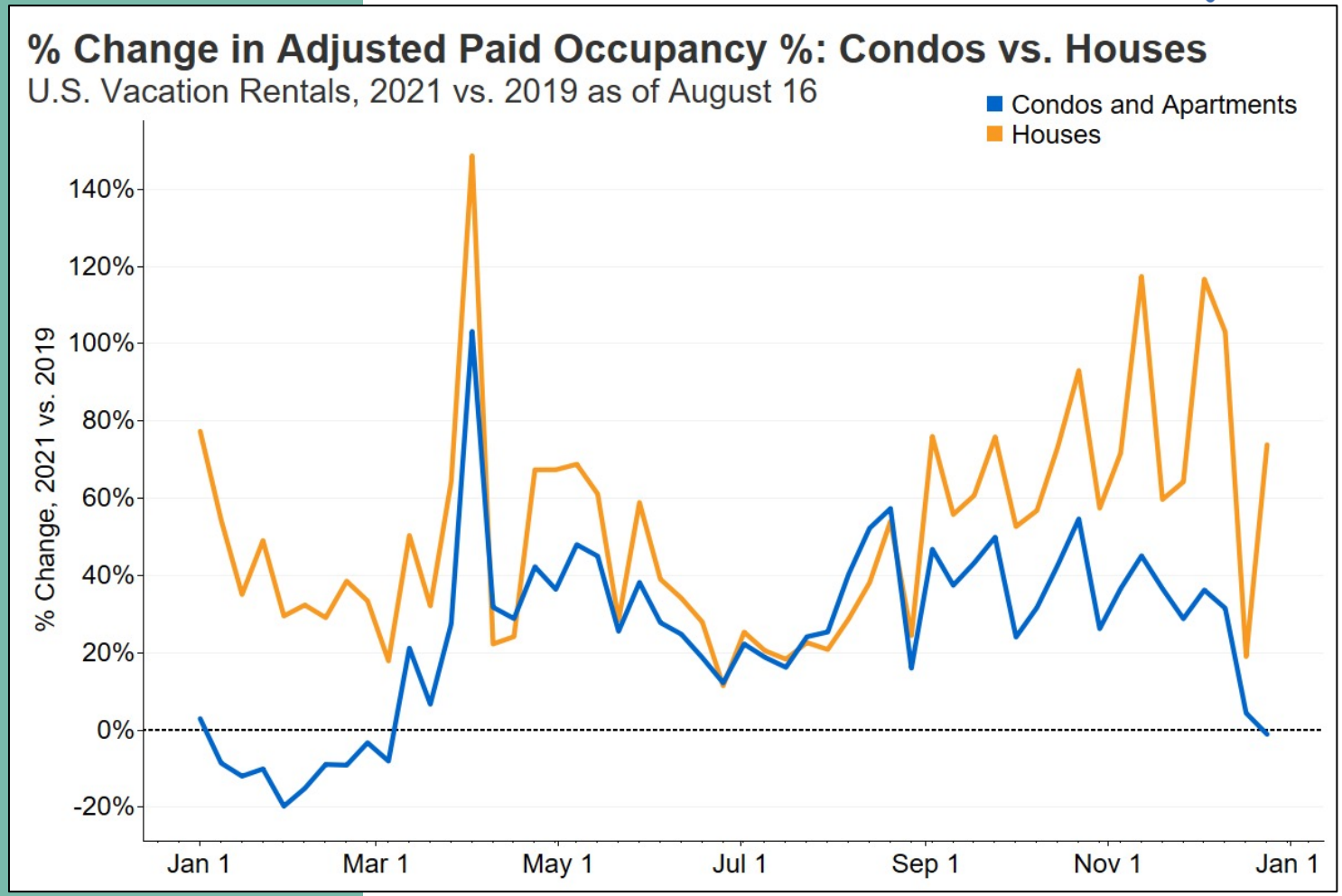
United States Adjusted RevPAR




% Change in Key Metrics
2021 YTD vs 2019 YTD as of August 10
KEYDATA™
Leisure
Colorado Western Slope
15%
18%
35%
FL-AL Panhandle
14%
49%
71%
Hawaii
3%
4%
7%
Lake Tahoe
53%
23%
89%
Outer Banks
29%
6%
36%
TN Smokies
53%
42%
118%
TX Gulf Coast
29%
29%
65%
Urban
Atlanta
22%
3%
26%
Austin
30%
10%
46%
Seattle
21%
-25%
-14%
Washington DC
-11%
-42%
-48%
Adj. Paid Occupancy
ADR
Adj. RevPAR

Inventory Differences

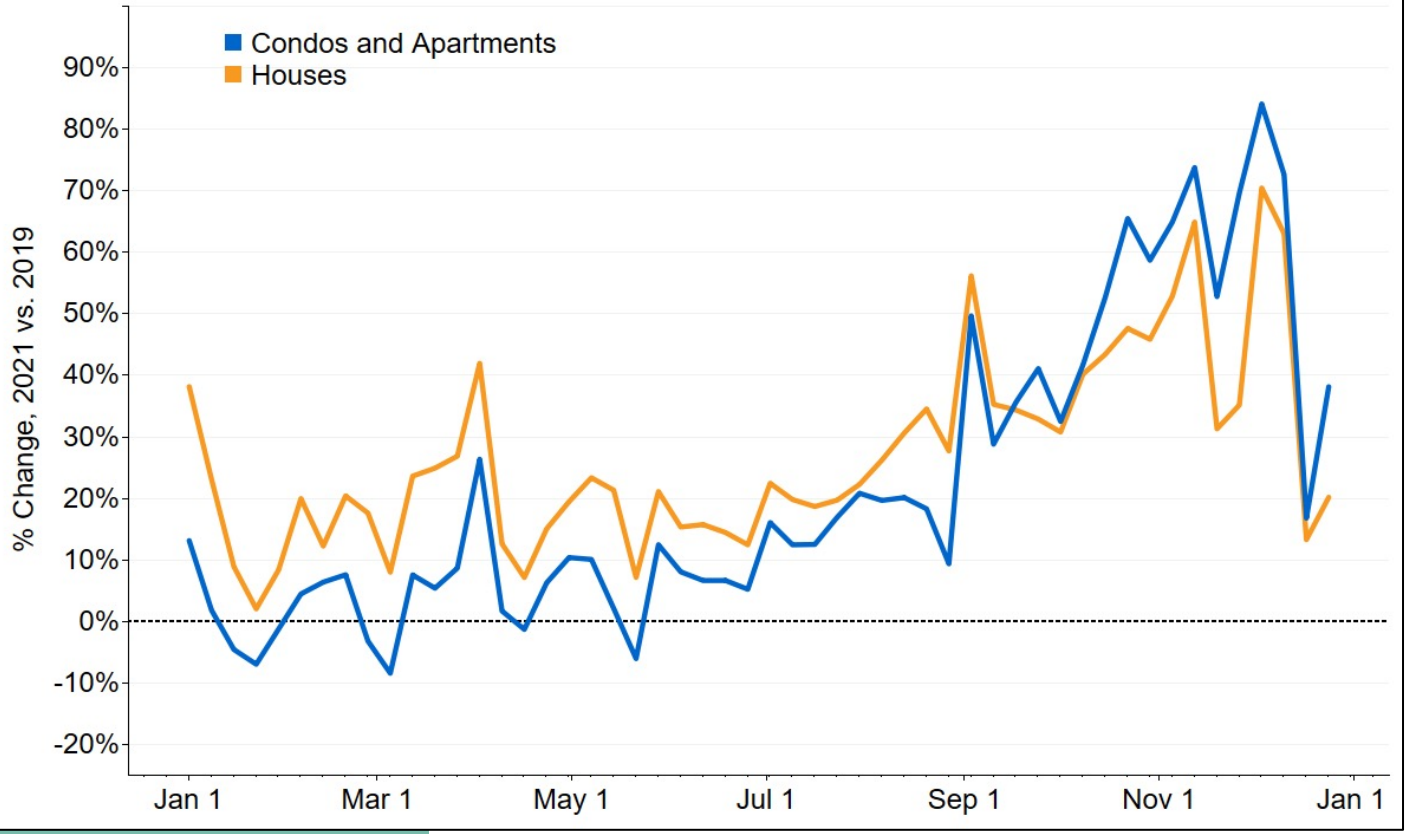
KEYDATA™


% Change in Adjusted Paid Occupancy %: Condos vs. Houses
U.S. Vacation Rentals, 2021 vs. 2019 as of August 16
Condos and Apartments
Houses
% Change, 2021 vs. 2019
140%
120%
100%
80%
60%
40%
20%
0%
-20%
Jan 1
Mar 1
May 1
Jul 1
Sep 1
Nov 1
Jan 1

KEYDATA™

% Change in ADR: Unit Type

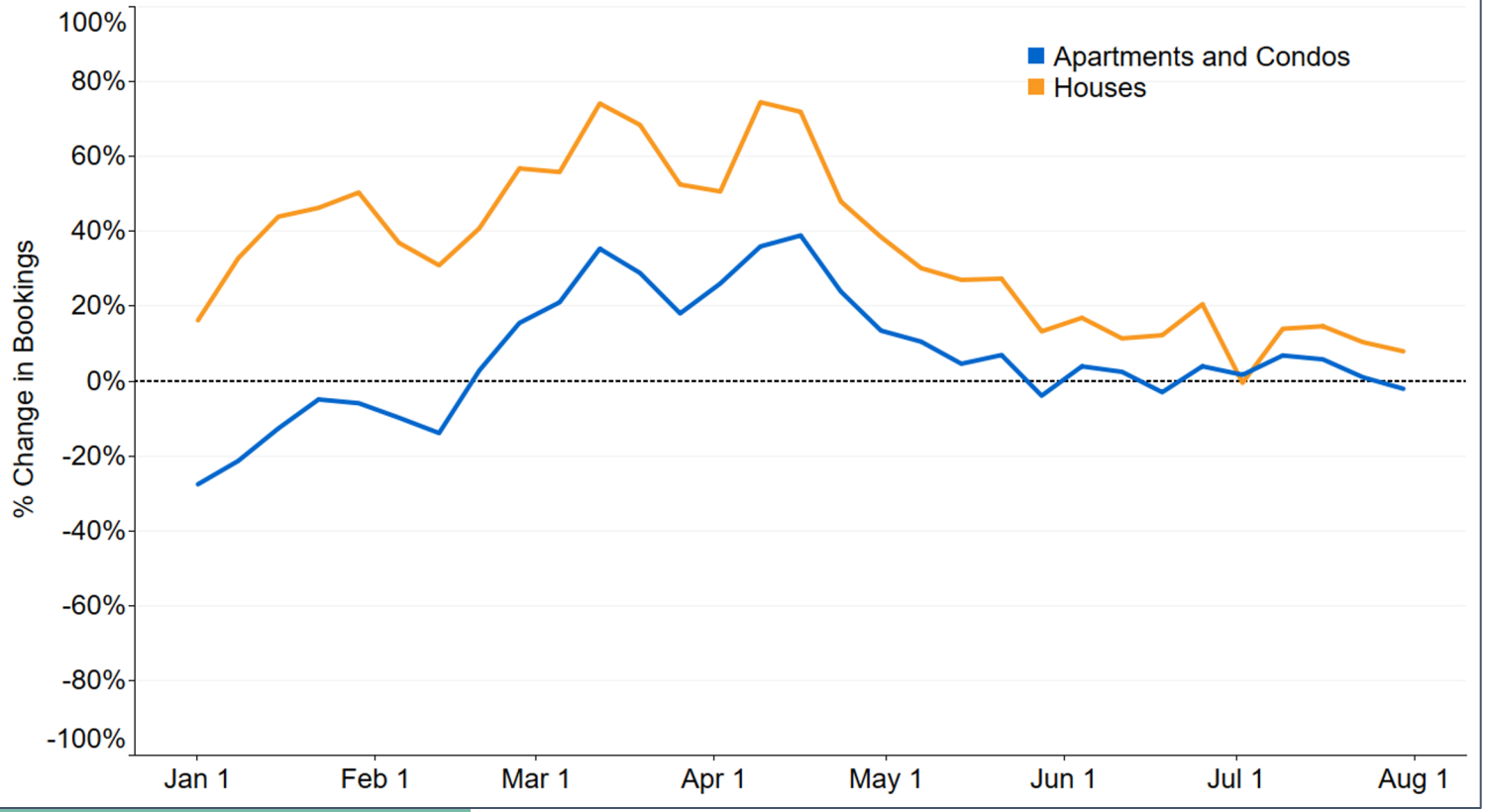
U.S. Vacation Rentals, 2021 vs. 2019 as of August 16



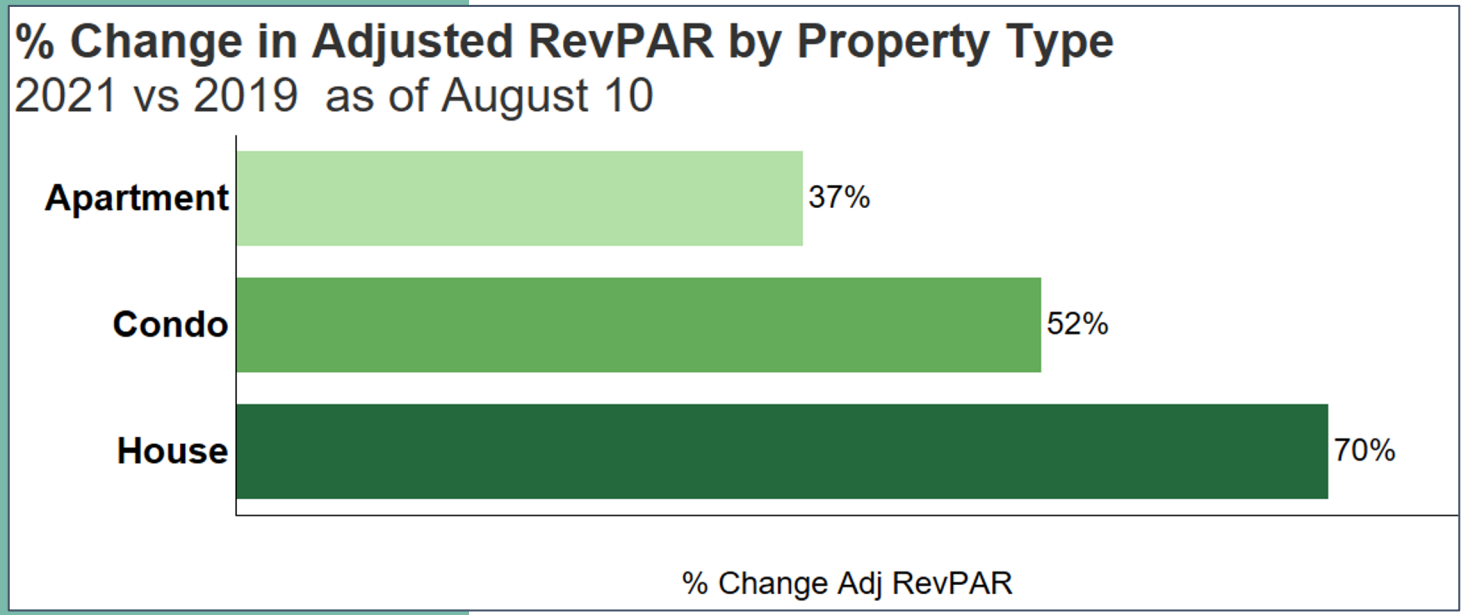
KEYDATA™

% Change in New Guest Bookings Per Property

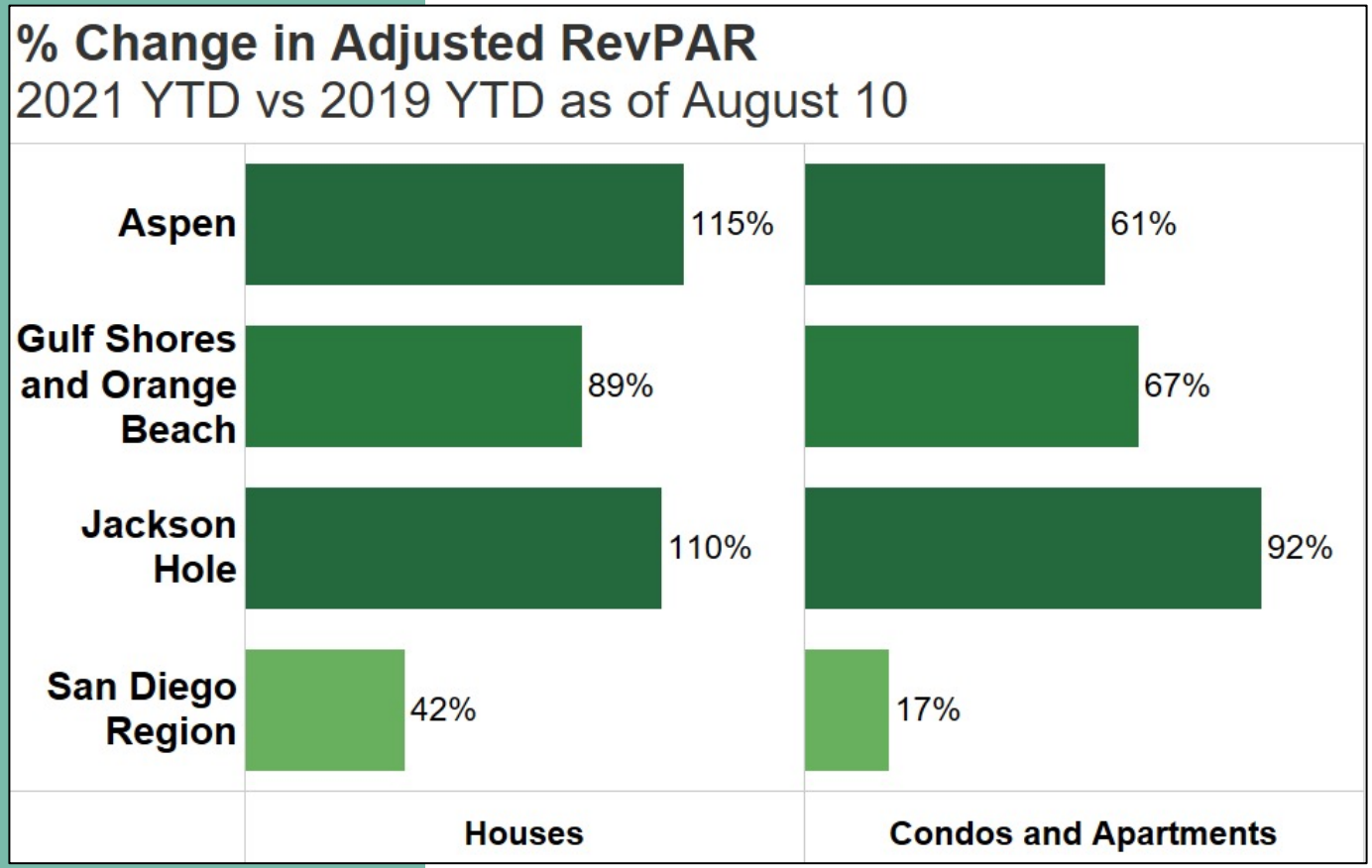
U.S. Vacation Rentals, 2021 vs. 2019



KEYDATA™


% Change in Adjusted RevPAR by Property Type
2021 vs 2019 as of August 10
Apartment
37%
Condo
52%
House
70%
% Change Adj RevPAR

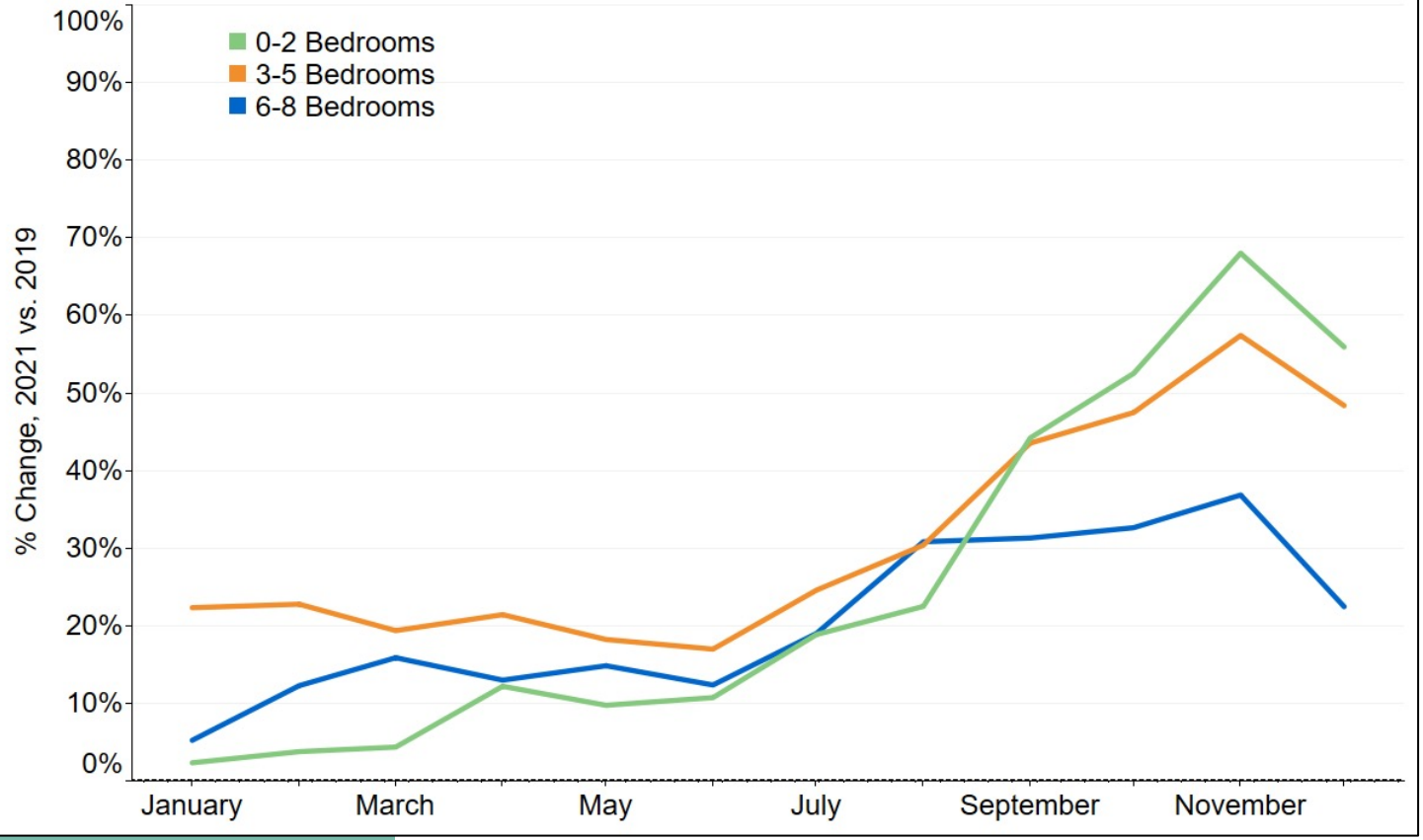
KEYDATA™


% Change in Adjusted RevPAR
2021 YTD vs 2019 YTD as of August 10
Aspen
115%
61%
Gulf Shores and Orange Beach
89%
67%
Jackson Hole
110%
92%
San Diego Region
42%
17%
Houses
Condos and Apartments

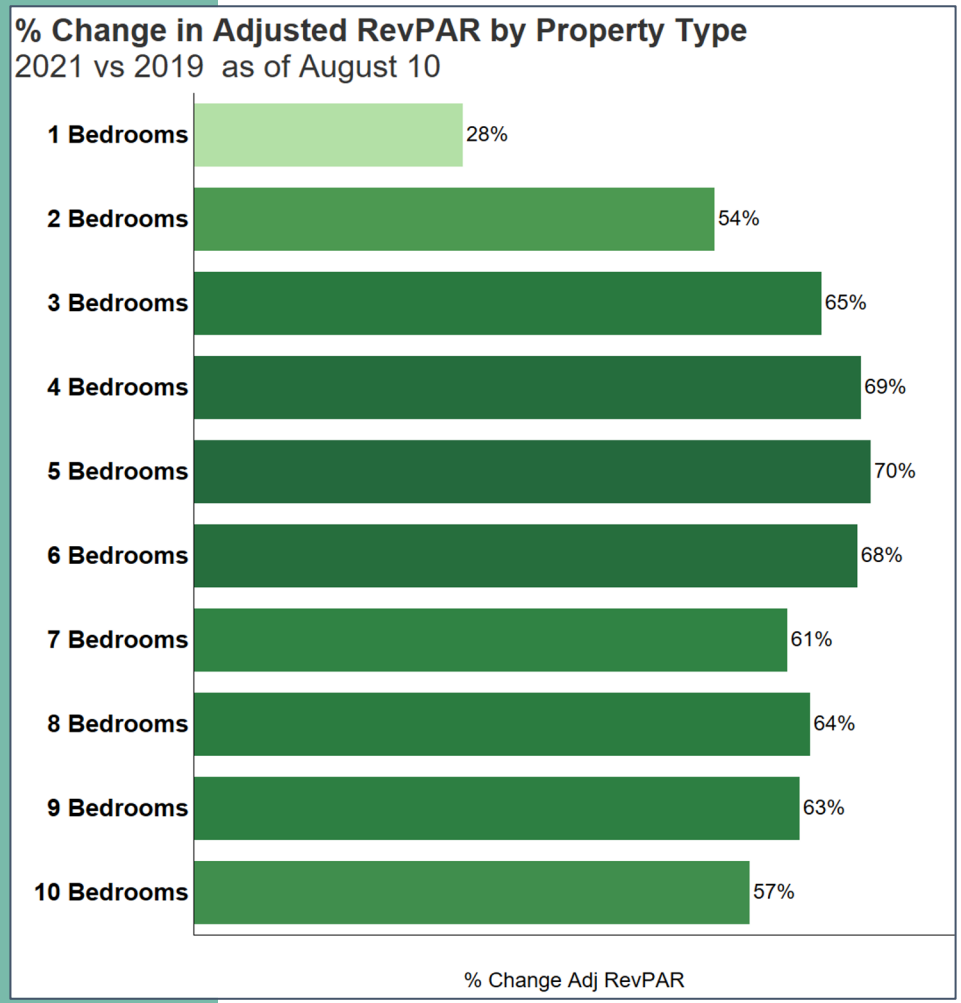
KEYDATA™

% Change in ADR: Bedroom Counts

U.S. Vacation Rentals, 2021 vs. 2019 as of August 16



KEYDATA™

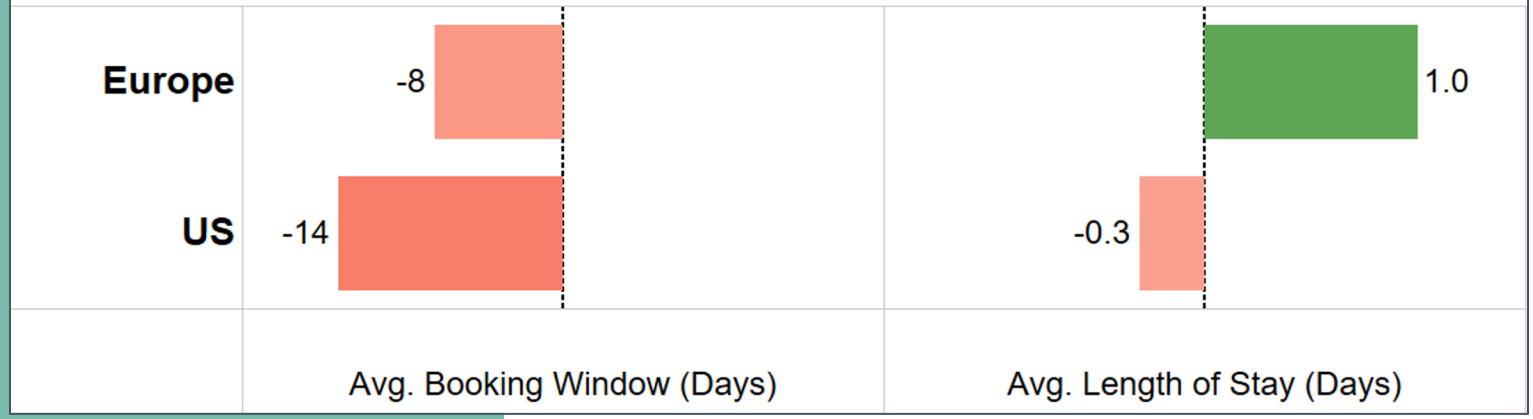

% Change in Adjusted RevPAR by Property Type
2021 vs 2019 as of August 10
1 Bedrooms
28%
2 Bedrooms
54%
3 Bedrooms
65%
4 Bedrooms
69%
5 Bedrooms
70%
6 Bedrooms
68%
7 Bedrooms
61%
8 Bedrooms
64%
9 Bedrooms
63%
10 Bedrooms
57%
% Change Adj RevPAR

U.S. Booking Trends

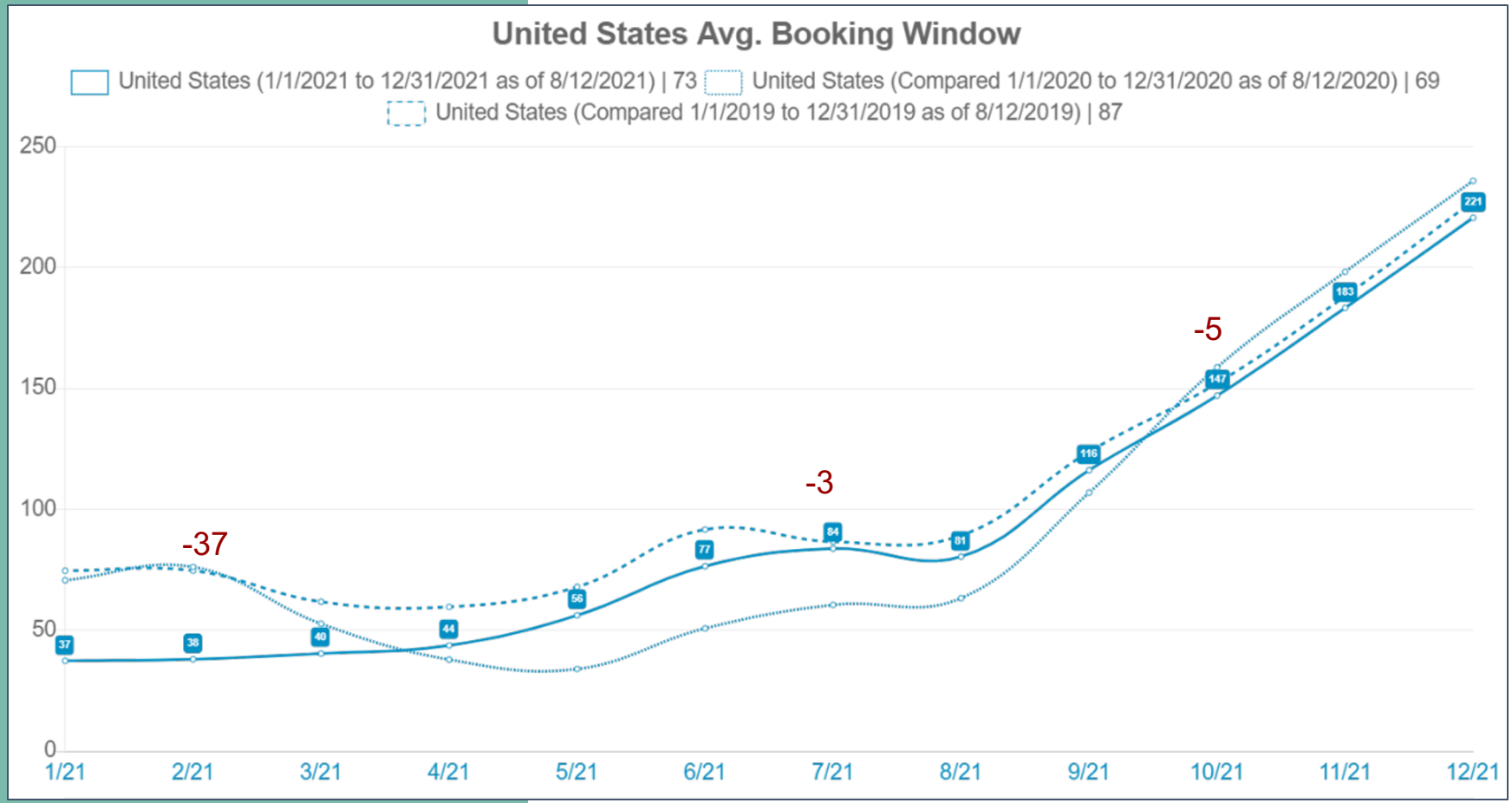
Change in Key Booking Metrics

2021 vs 2019 as of August 10

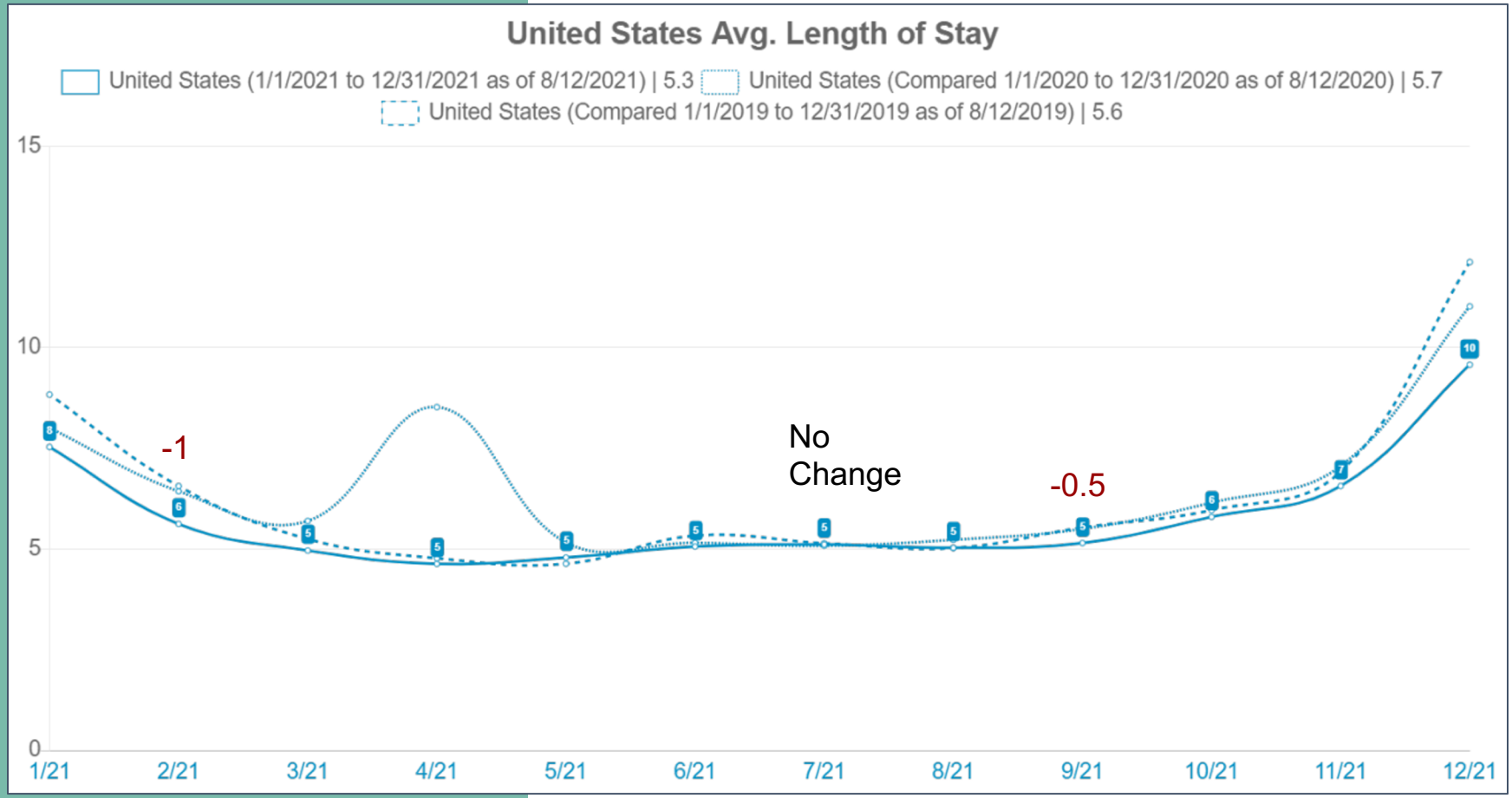
KEYDATA™



KEYDATA™


United States Avg. Booking Window
United States (1/1/2021 to 12/31/2021 as of 8/12/2021) | 73
United States (Compared 1/1/2020 to 12/31/2020 as of 8/12/2020) | 69
United States (Compared 1/1/2019 to 12/31/2019 as of 8/12/2019) | 87
250
200
150
100
50
0
1/21
2/21
3/21
4/21
5/21
6/21
7/21
8/21
9/21
10/21
11/21
12/21
37
38
40
44
56
77
84
81
116
147
183
221
-37
-3
-5

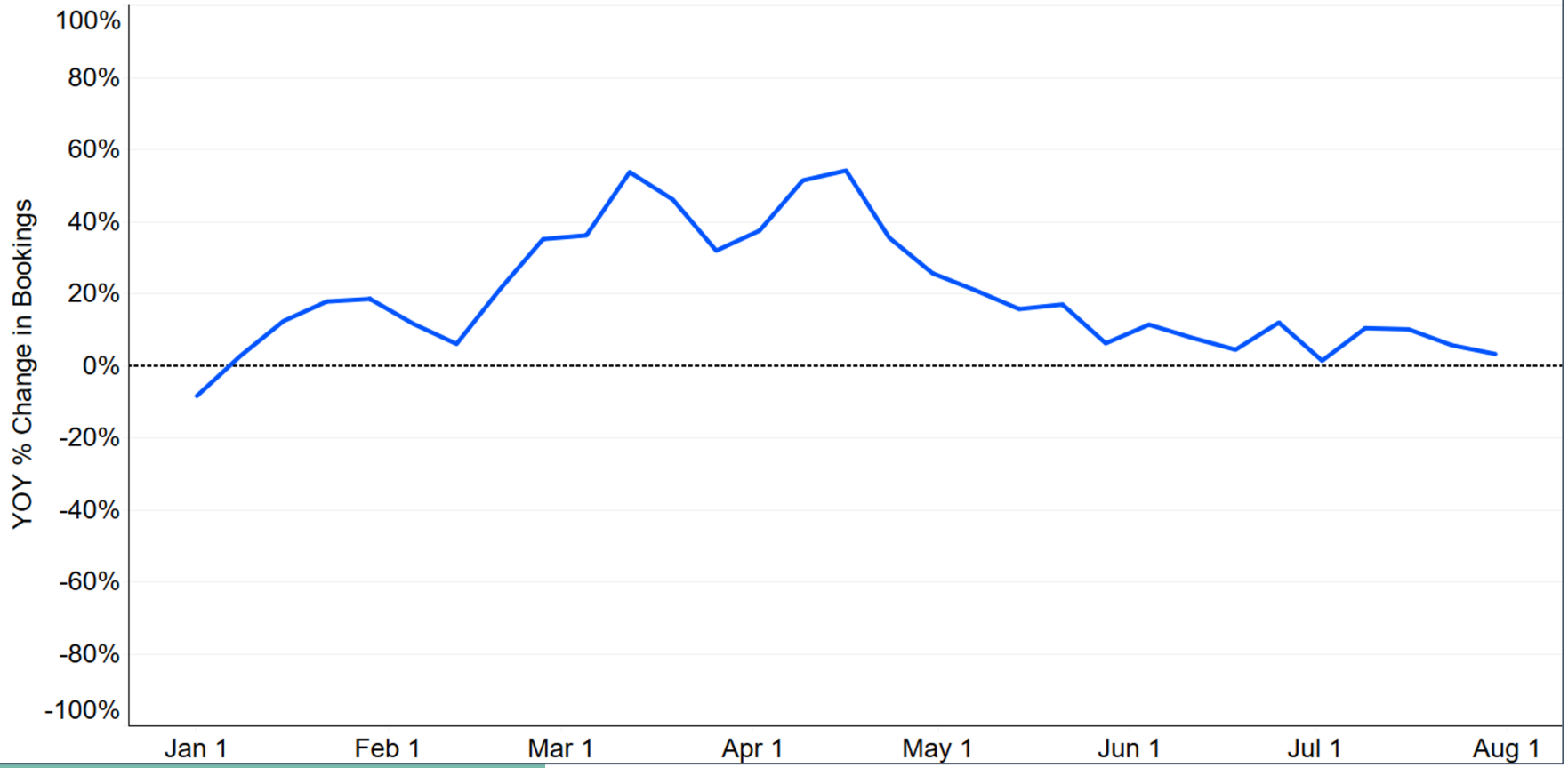
KEYDATA™


United States Avg. Length of Stay
United States (1/1/2021 to 12/31/2021 as of 8/12/2021) | 5.3
United States (Compared 1/1/2020 to 12/31/2020 as of 8/12/2020) | 5.7
United States (Compared 1/1/2019 to 12/31/2019 as of 8/12/2019) | 5.6
15
10
5
0
-1
No Change
-0.5
1/21
2/21
3/21
4/21
5/21
6/21
7/21
8/21
9/21
10/21
11/21
12/21

% Change in New Guest Bookings Per Property

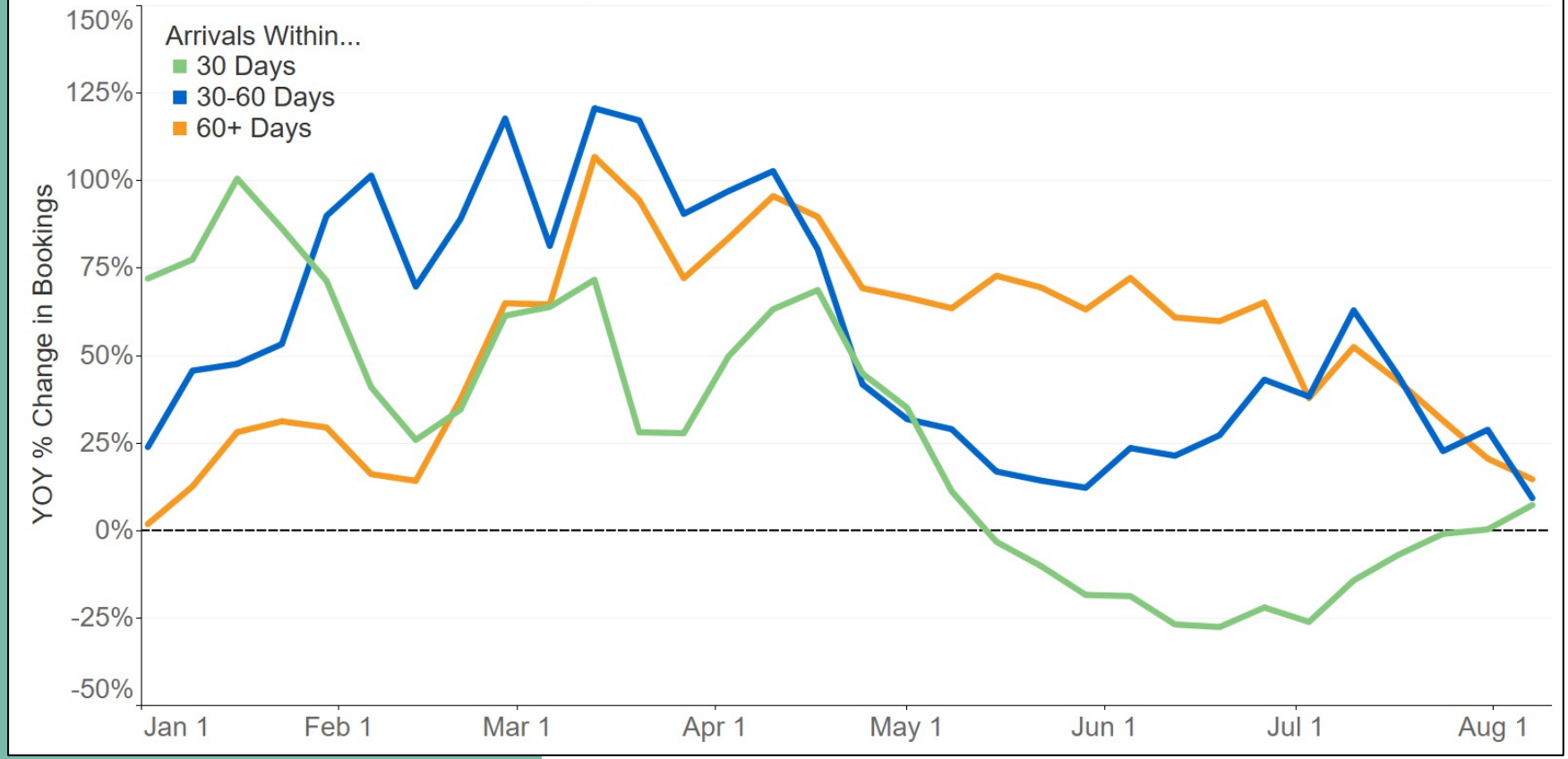
U.S. Vacation Rentals, 2021 vs. 2019

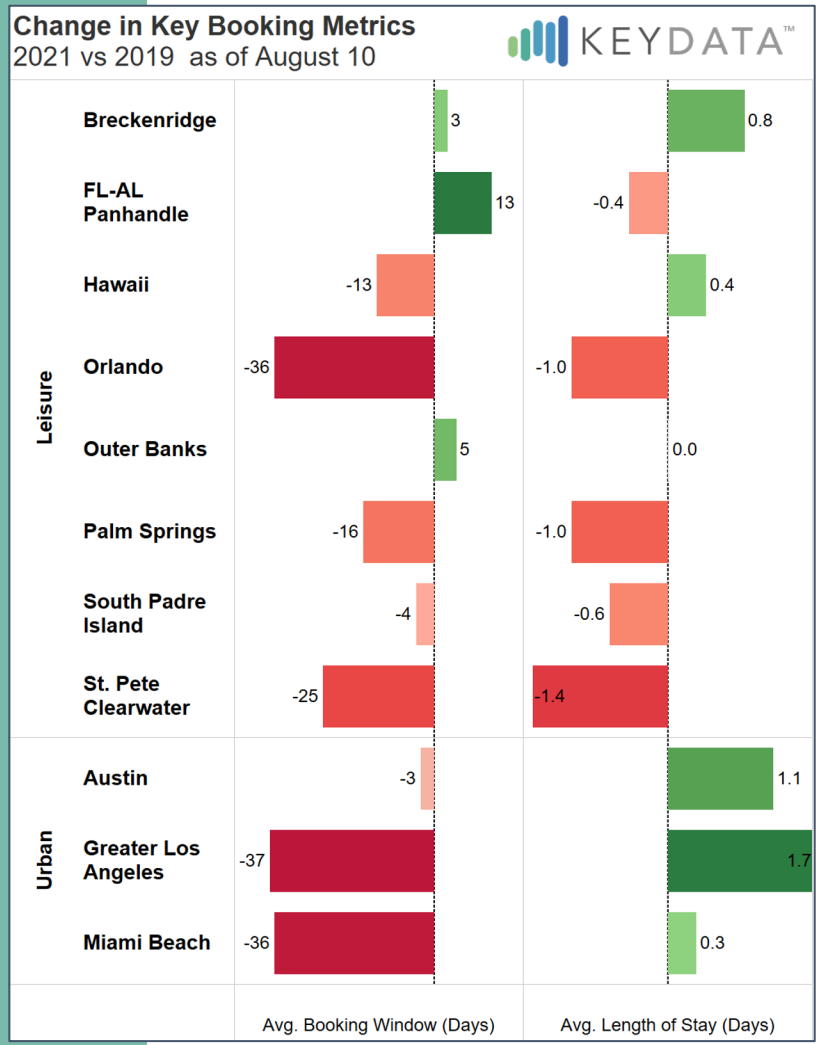
KEYDATA™



% Change in New Guest Bookings per Property

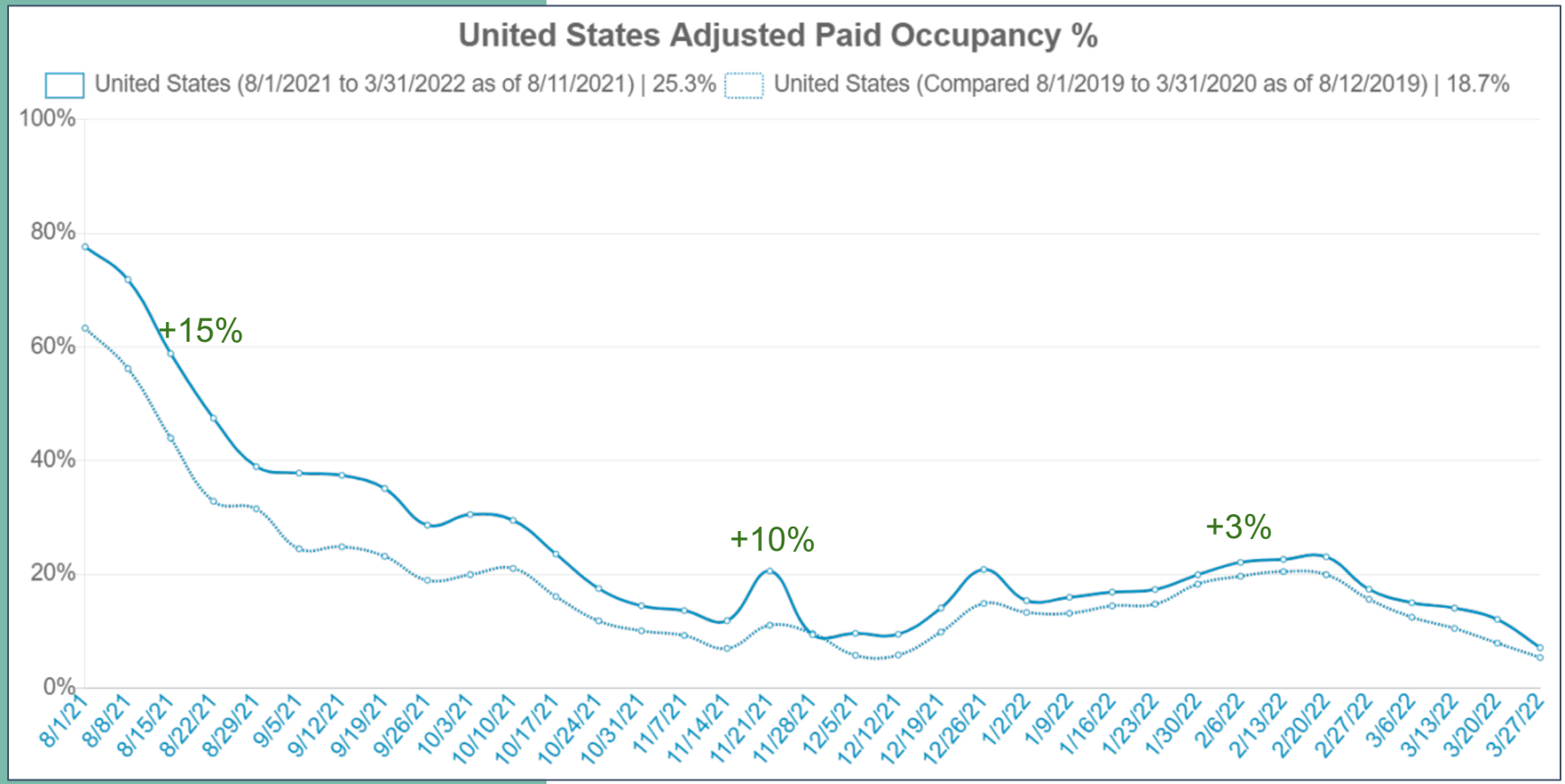
Southeast U.S. Vacation Rentals, 2021 vs 2019



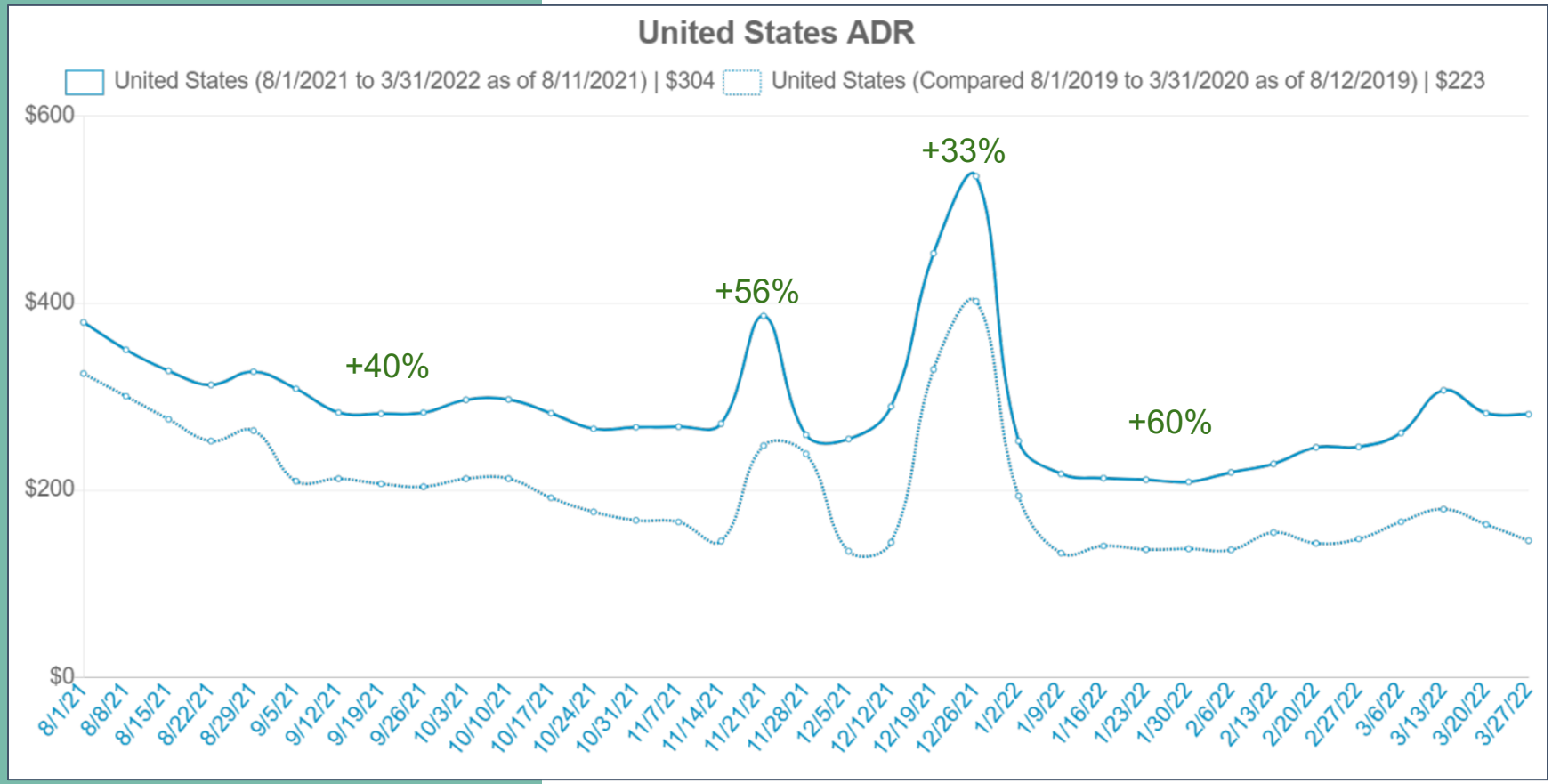

Change in Key Booking Metrics
2021 vs 2019 as of August 10
KEYDATA™
Leisure
Breckenridge
3
0.8
FL-AL Panhandle
13
-0.4
Hawaii
-13
0.4
Orlando
-36
-1.0
Outer Banks
5
0.0
Palm Springs
-16
-1.0
South Padre Island
-4
-0.6
St. Pete Clearwater
-25
-1.4
Urban
Austin
-3
1.1
Greater Los Angeles
-37
1.7
Miami Beach
-36
0.3
Avg. Booking Window (Days)
Avg. Length of Stay (Days)

Looking Ahead

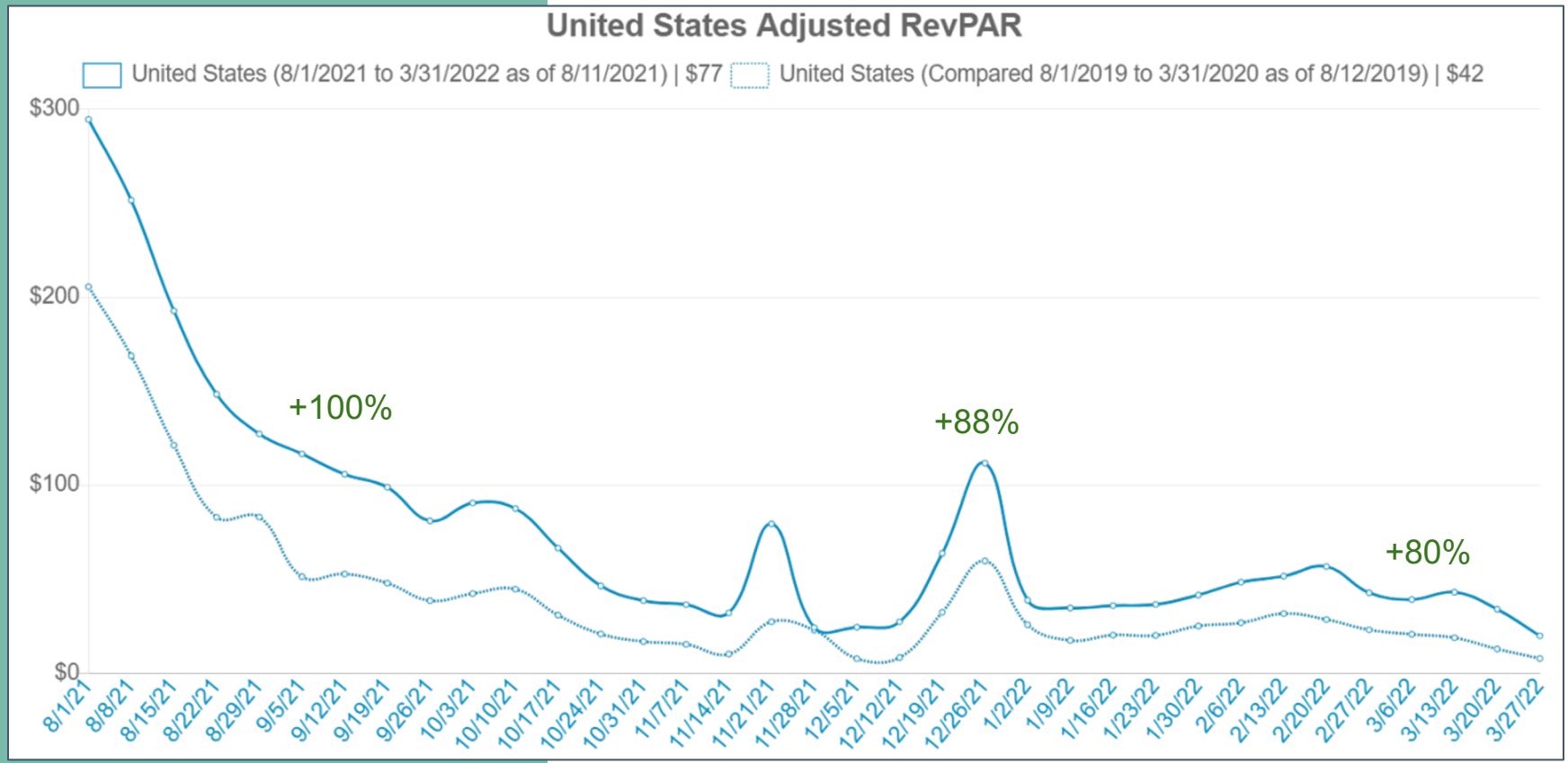
KEYDATA™


United States Adjusted Paid Occupancy %
United States (8/1/2021 to 3/31/2022 as of 8/11/2021) | 25.3%
United States (Compared 8/1/2019 to 3/31/2020 as of 8/12/2019) | 18.7%
100%
80%
60%
40%
20%
0%
+15%
+10%
+3%
8/1/21
8/8/21
8/15/21
8/22/21
8/29/21
9/5/21
9/12/21
9/19/21
9/26/21
10/3/21
10/10/21
10/17/21
10/24/21
10/31/21
11/7/21
11/14/21
11/21/21
11/28/21
12/5/21
12/12/21
12/19/21
12/26/21
1/2/22
1/9/22
1/16/22
1/23/22
1/30/22
2/6/22
2/13/22
2/20/22
2/27/22
3/6/22
3/13/22
3/20/22
3/27/22

KEYDATA™


United States ADR
United States (8/1/2021 to 3/31/2022 as of 8/11/2021) | $304
United States (Compared 8/1/2019 to 3/31/2020 as of 8/12/2019) | $223
$600
$400
$200
$0
+40%
+56%
+33%
+60%
8/1/21
8/8/21
8/15/21
8/22/21
8/29/21
9/5/21
9/12/21
9/19/21
9/26/21
10/3/21
10/10/21
10/17/21
10/24/21
10/31/21
11/7/21
11/14/21
11/21/21
11/28/21
12/5/21
12/12/21
12/19/21
12/26/21
1/2/22
1/9/22
1/16/22
1/23/22
1/30/22
2/6/22
2/13/22
2/20/22
2/27/22
3/6/22
3/13/22
3/20/22
3/27/22

KEYDATA™


United States Adjusted RevPAR
United States (8/1/2021 to 3/31/2022 as of 8/11/2021) | $77
United States (Compared 8/1/2019 to 3/31/2020 as of 8/12/2019) | $42
$300
$200
$100
$0
+100%
+88%
+80%
8/1/21
8/8/21
8/15/21
8/22/21
8/29/21
9/5/21
9/12/21
9/19/21
9/26/21
10/3/21
10/10/21
10/17/21
10/24/21
10/31/21
11/7/21
11/14/21
11/21/21
11/28/21
12/5/21
12/12/21
12/19/21
12/26/21
1/2/22
1/9/22
1/16/22
1/23/22
1/30/22
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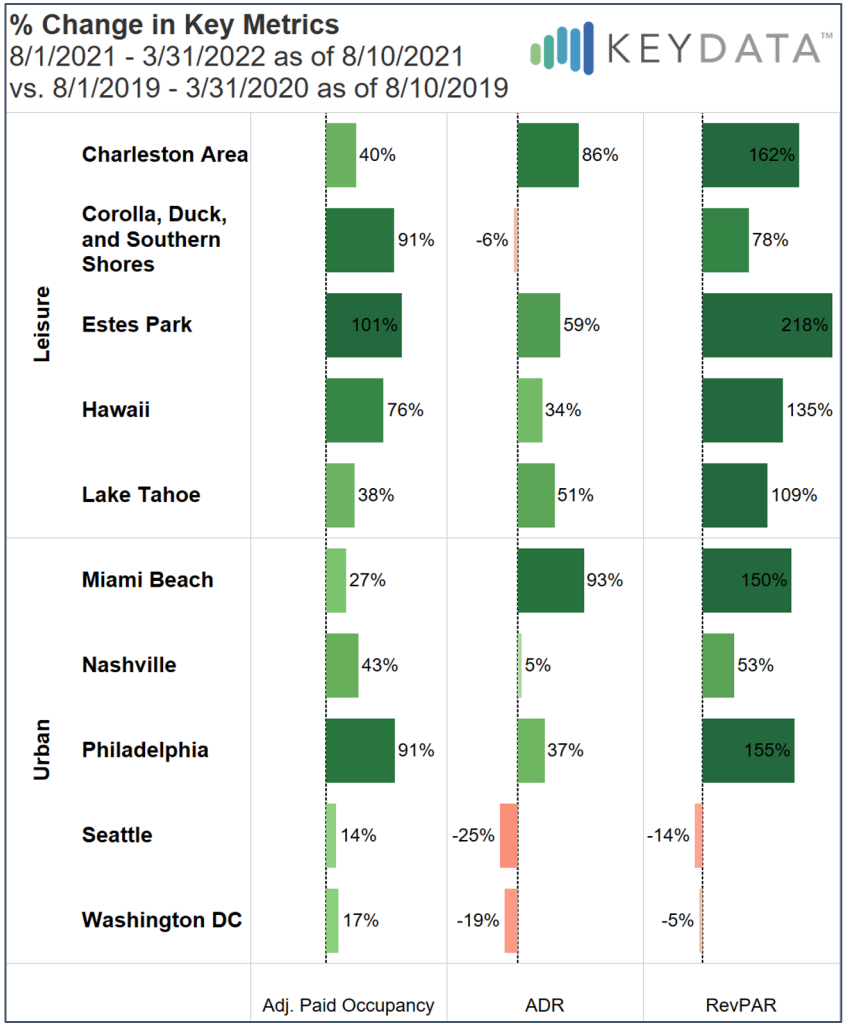
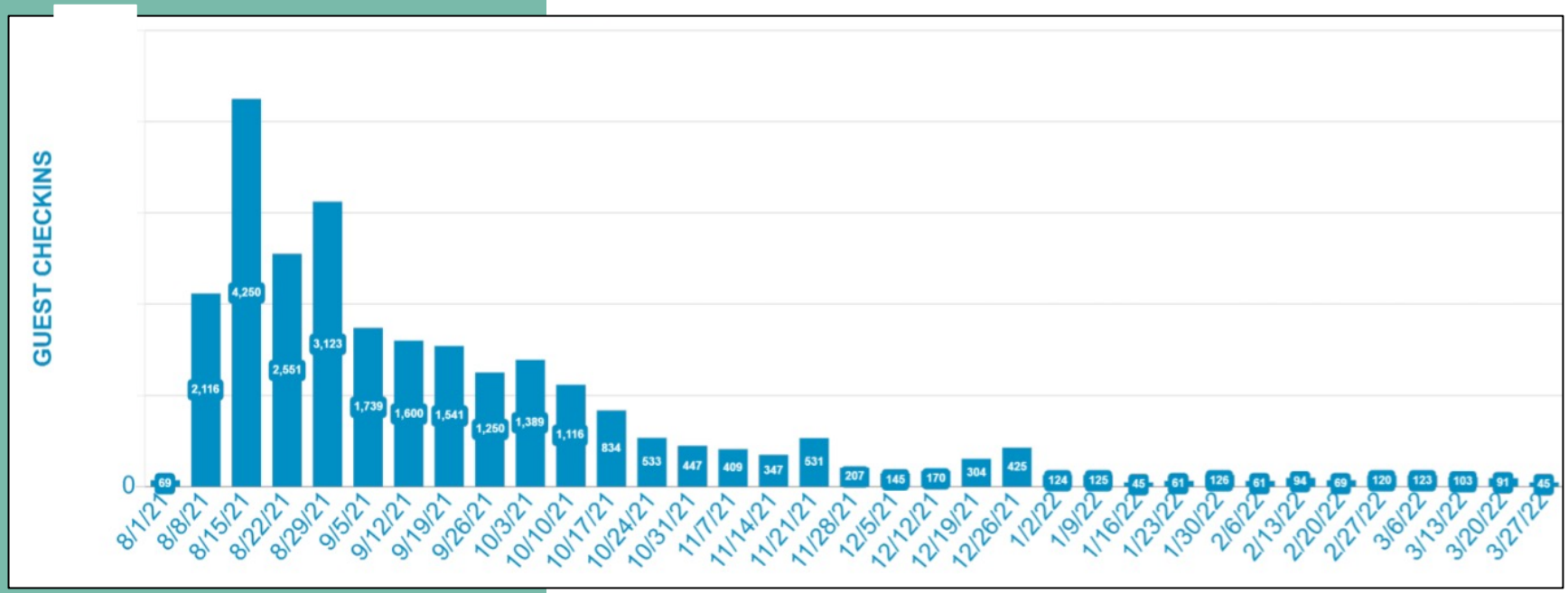
3/20/22
3/27/22


% Change in Key Metrics
8/1/2021 - 3/31/2022 as of 8/10/2021
vs. 8/1/2019 - 3/31/2020 as of 8/10/2019
KEYDATA
Leisure
Charleston Area
40%
86%
162%
Corolla, Duck, and Southern Shores
91%
-6%
78%
Estes Park
101%
59%
218%
Hawaii
76%
34%
135%
Lake Tahoe
38%
51%
109%
Urban
Miami Beach
27%
93%
150%
Nashville
43%
5%
53%
Philadelphia
91%
37%
155%
Seattle
14%
-25%
-14%
Washington DC
17%
-19%
-5%
Adj. Paid Occupancy
ADR
RevPAR

Guest Arrivals for Reservations Made 8/11/2021 - 8/17/2021
Southeast U.S. Vacation Rentals

KEYDATA™



The state of the industry…

- Is strong! And staying strong for the foreseeable future.
- Rates are up.
- Europe is still recovering.
- Booking behavior is returning to normal.
- Change isn’t uniform. Get to know these metrics for your market.

Thank you.

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WEB // KeyDataDashboard.com