



State of the Vacation Rental Industry: Leisure Short - Term Rental Performance and Predictive Indicators

8.9.22



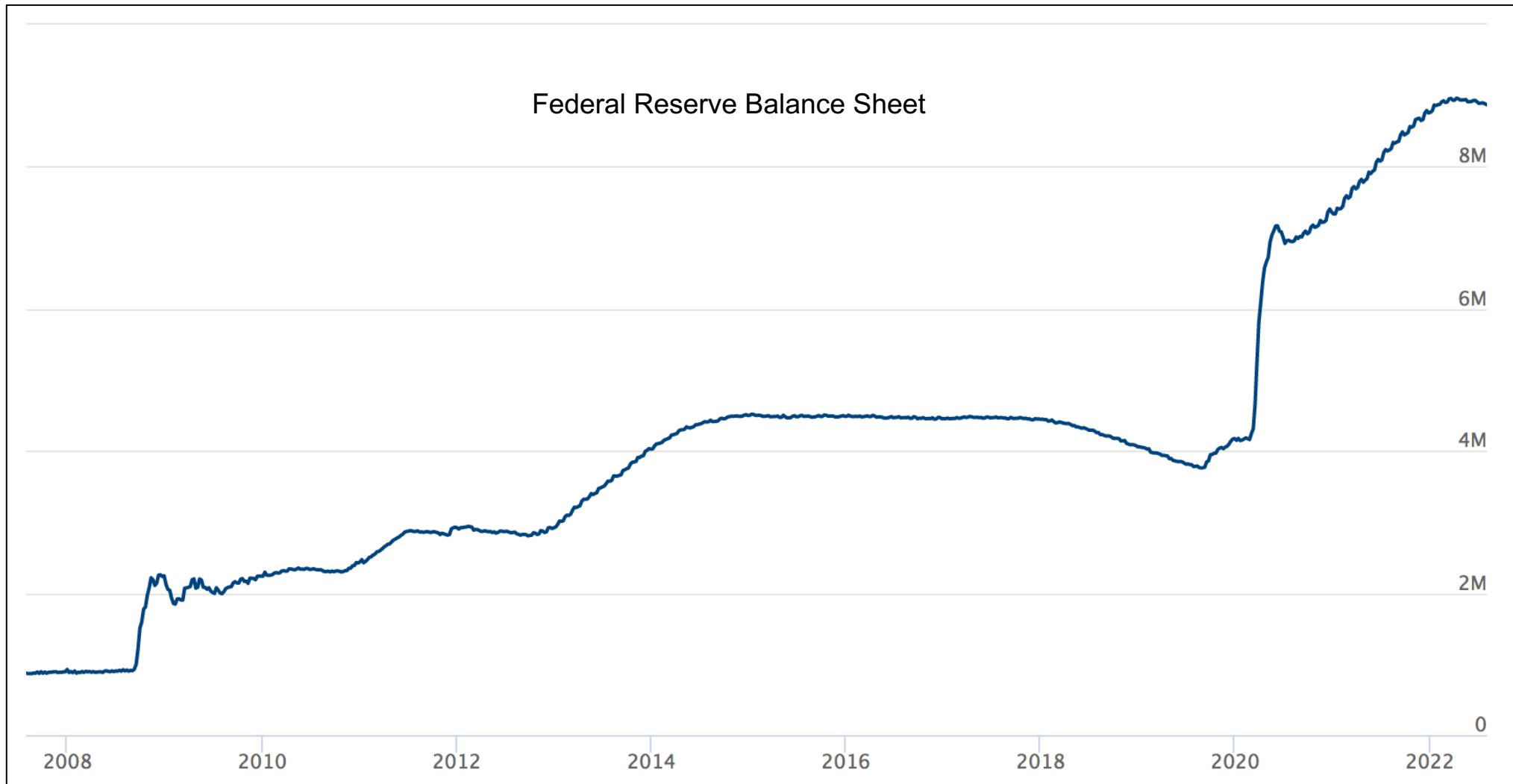
Jason Sprenkle

CEO

The Economy

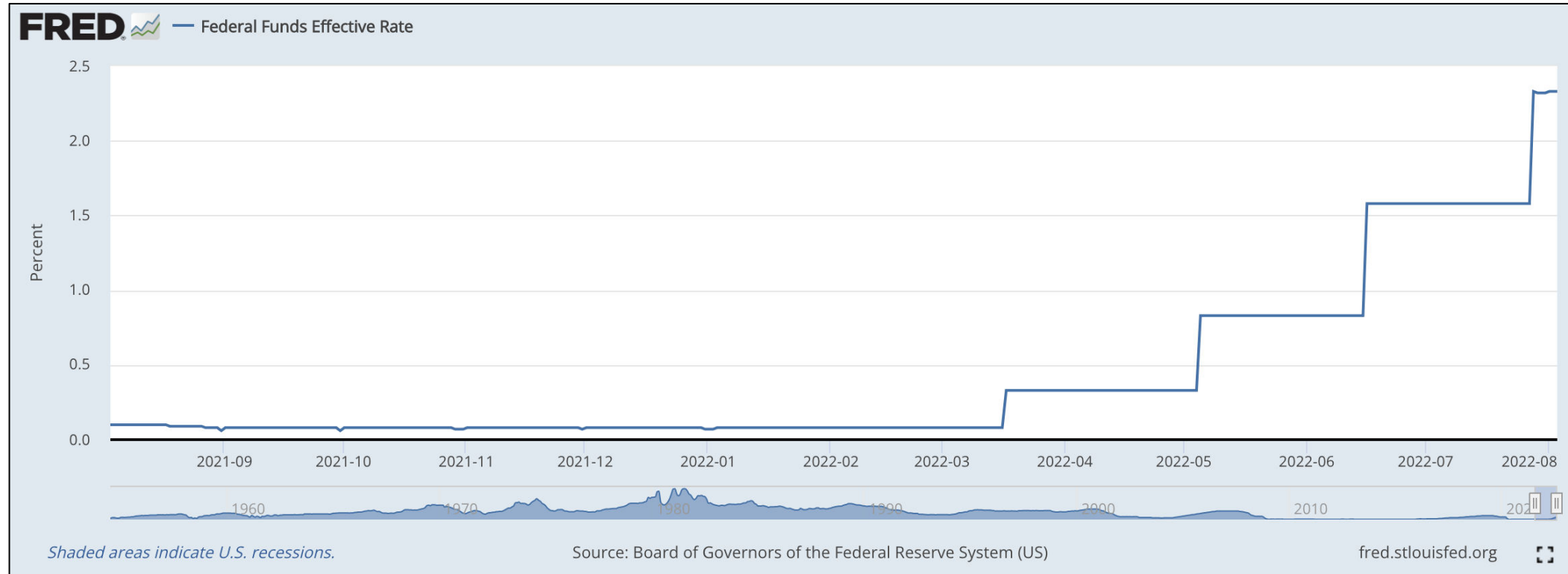


COVID – Monetary Stimulus

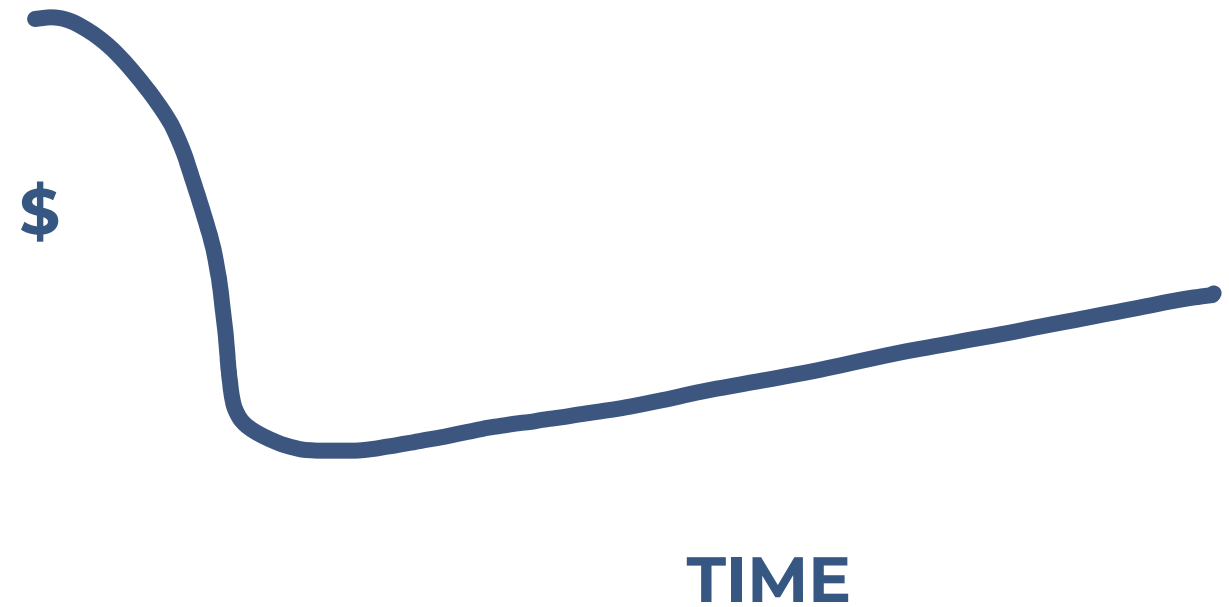


Source: [federalreserve.gov](https://www.federalreserve.gov)

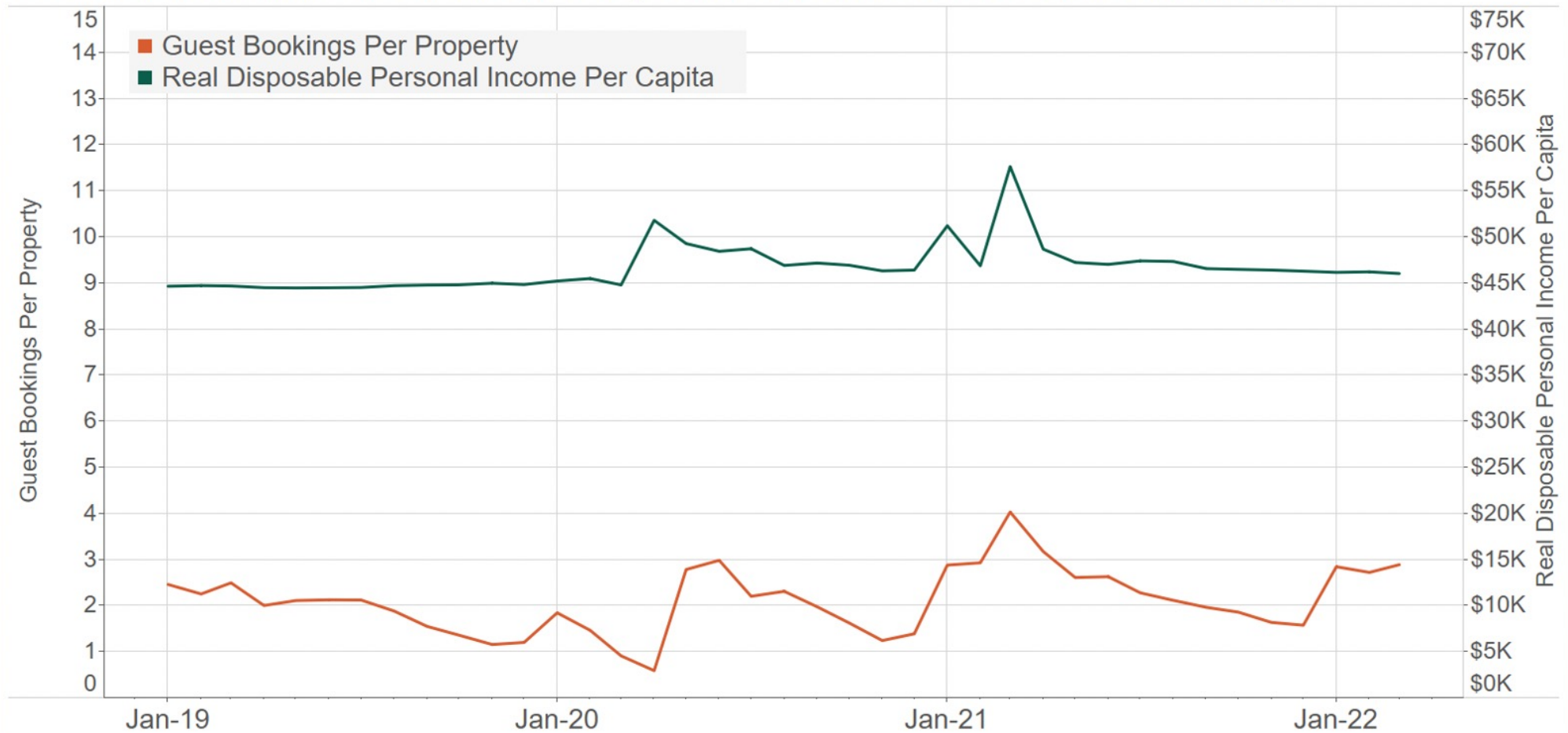
FED – Control Inflation & Tighten Liquidity



COVID
Massive Stimulus
War in Ukraine
Overheated Demand
Supply Chain Crisis
QE Drug
INFLATION



Vacation Rental Reservations and Disposable Income: What's the relationship?



Data Sources

Vacation Rental Bookings: Key Data's direct source data

Disposable Personal Income: U.S. Bureau of Economic Analysis

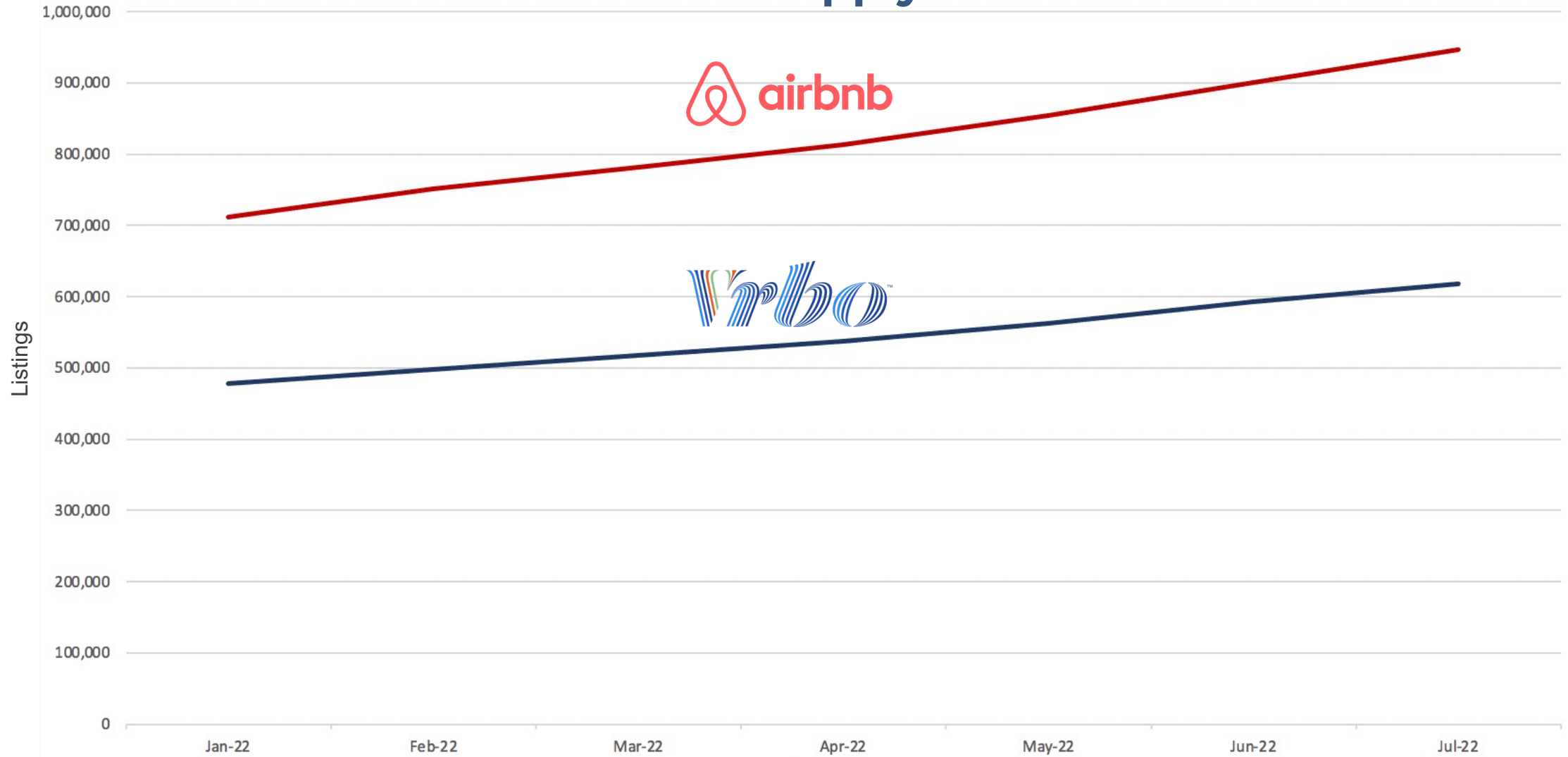
***“You cannot overtake 15 cars in sunny weather ...
But you can when it’s raining”***

- Ayrton Senna

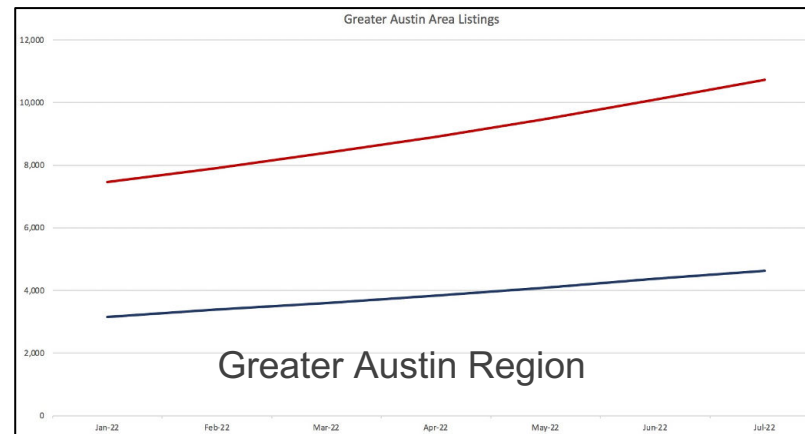
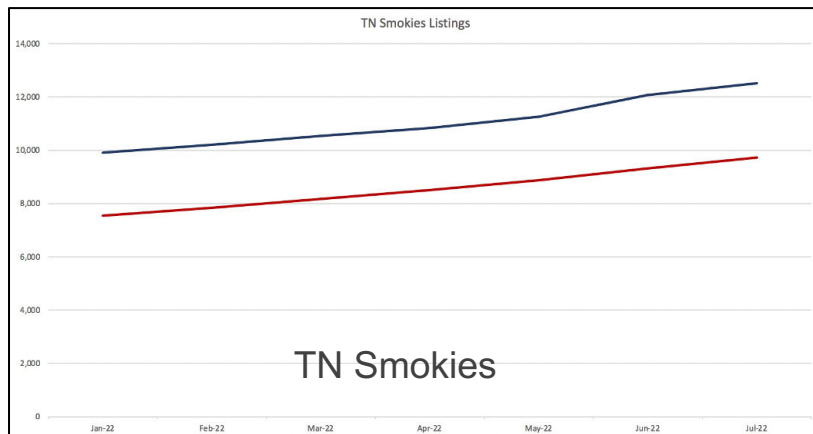
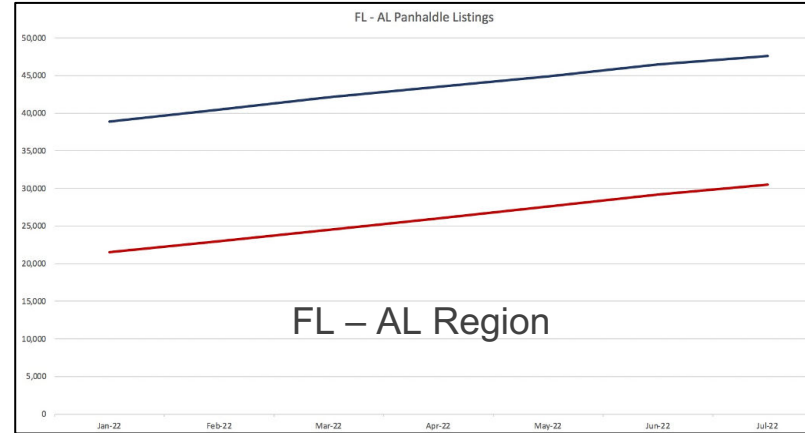
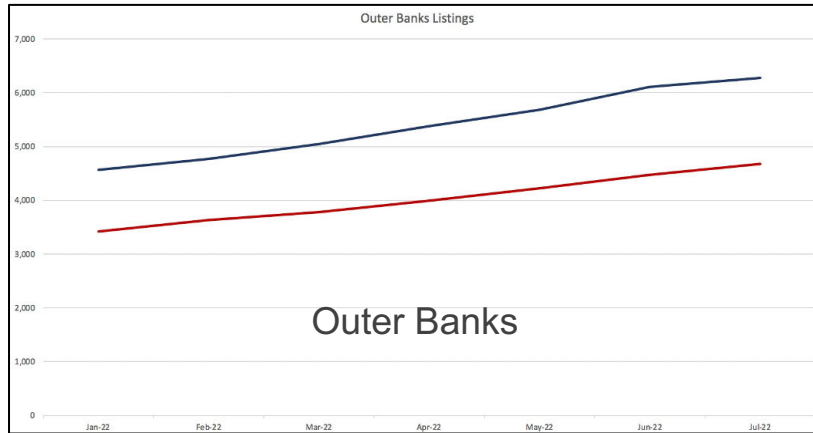
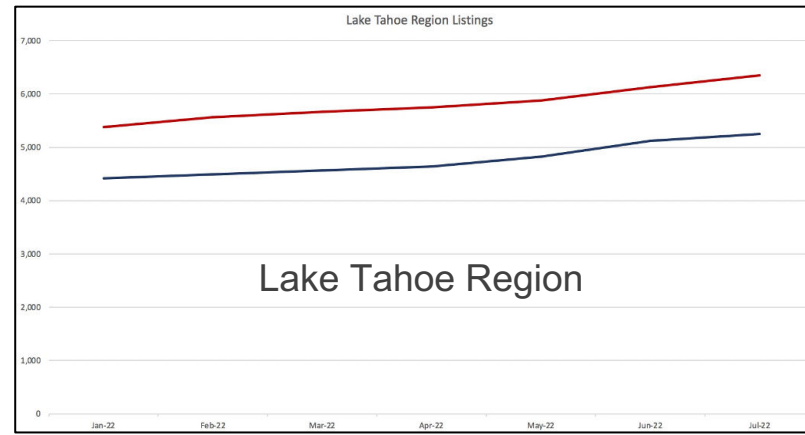
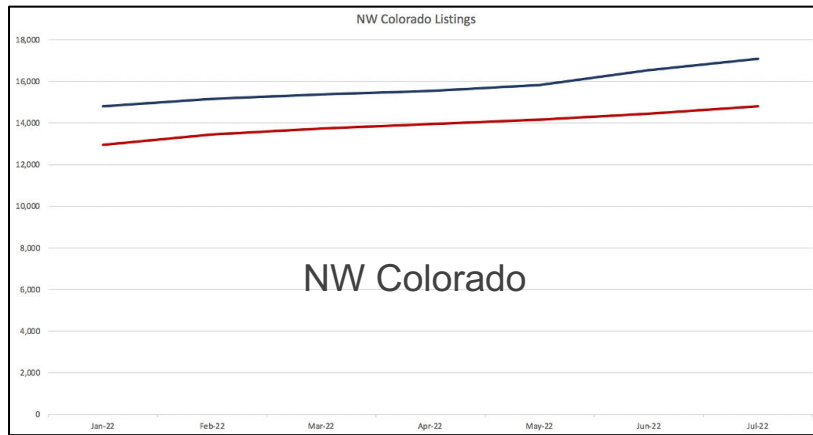
Supply



U.S. Supply



Supply by Region



Supply Outlook



Continued Growth

2nd Homeowners with less
disposable income elect
to rent or rent more

Demand Market Share

Housing Slow Down

Concerns about Economy

Dropping Revenue



***“It is not the strongest of the species that survive,
nor the most intelligent,
but the one more responsive to change.”***

- Charles Darwin

Supply Outlook



Continued Growth

2nd Homeowners with less
disposable income elect
to rent or rent more

Demand Market Share

**Business
Development**



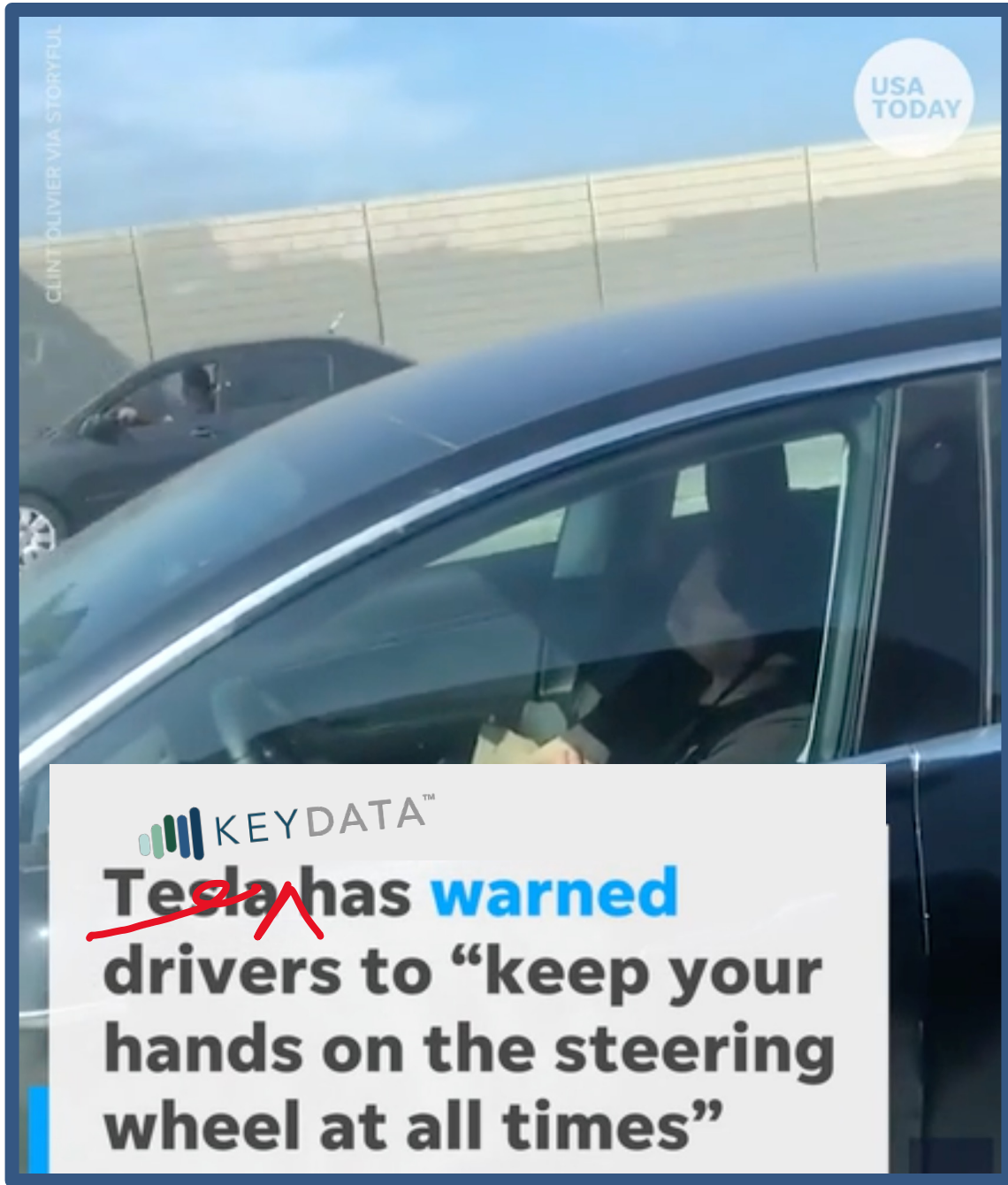
Housing Slow Down

Concerns about Economy

Dropping Revenue

**Maximizing ADR
Revenue Mgmt.**





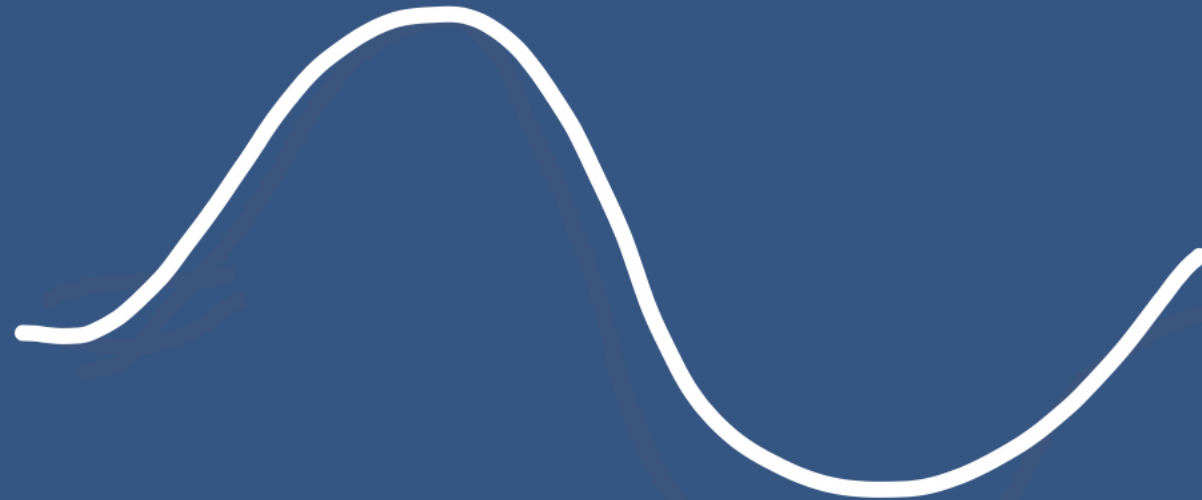
CLINT OLIVIER VIA STORYFUL

USA
TODAY

KEYDATA™

~~Tesla~~ has **warned**
drivers to “keep your
hands on the steering
wheel at all times”

2022

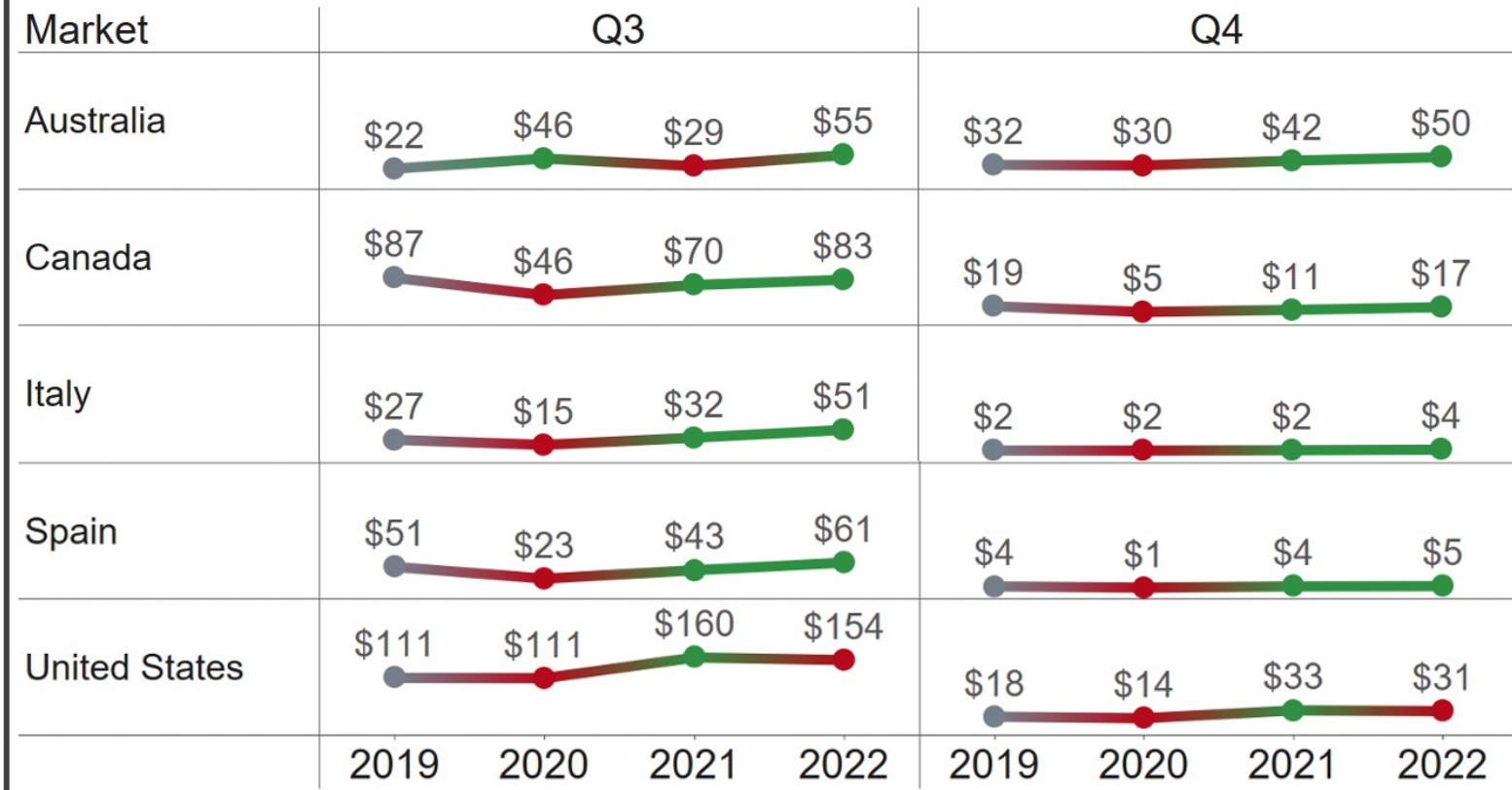


RevPAR by Country

Direct from property management partners. Data for Q3 and Q4 on the books as of July 18.

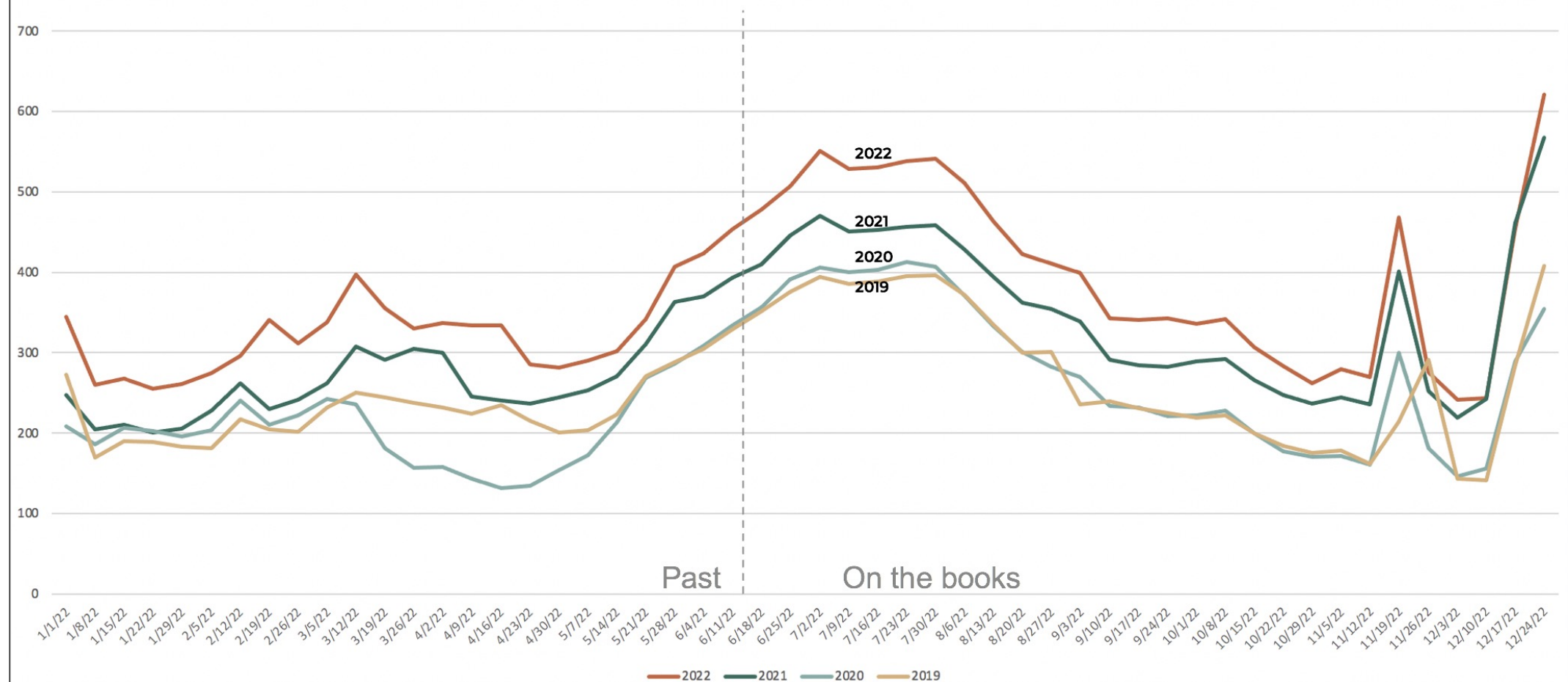
Change from previous year

■ decrease ■ increase



U.S. ADR as of 6/12

(and same day of week prior years)



— 2022 — 2021 — 2020 — 2019

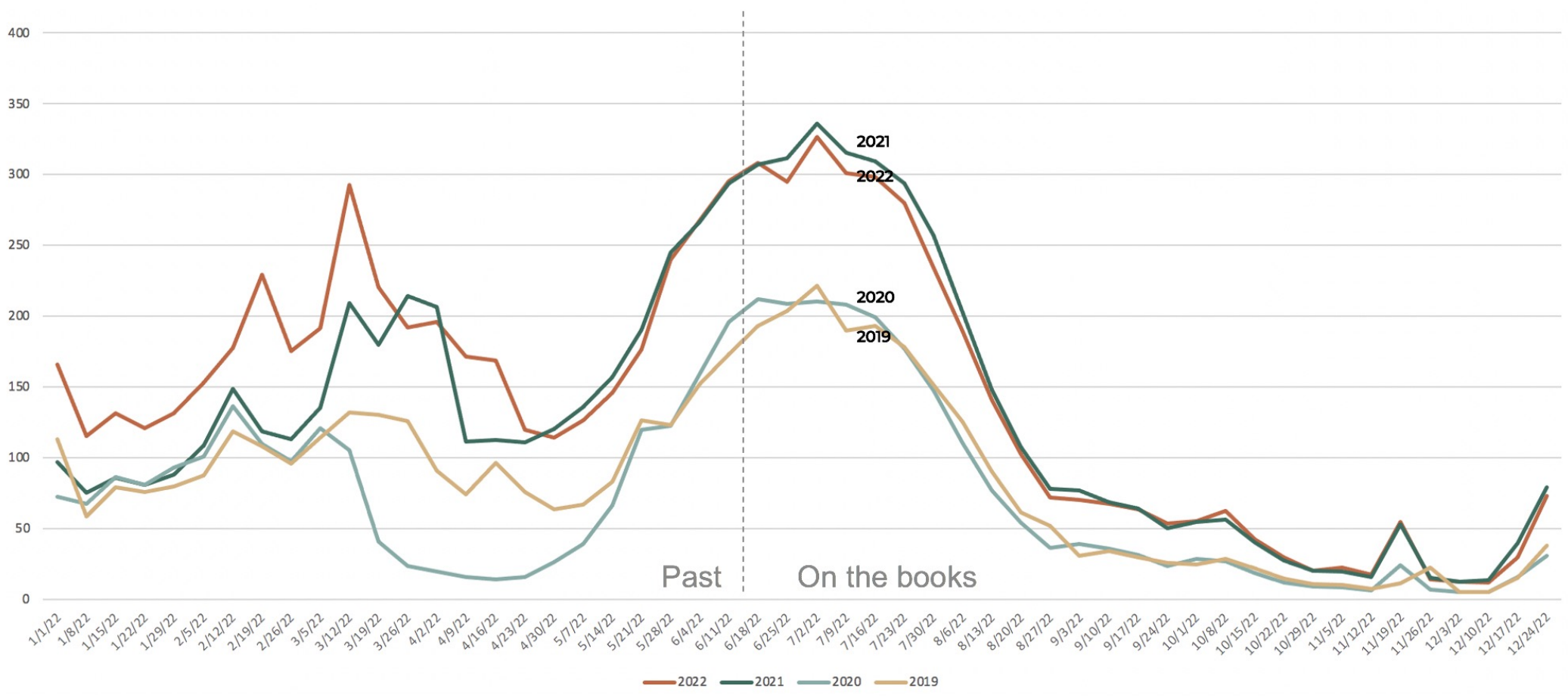
U.S. Adjusted Occupancy as of 6/12

(and same day of week prior years)



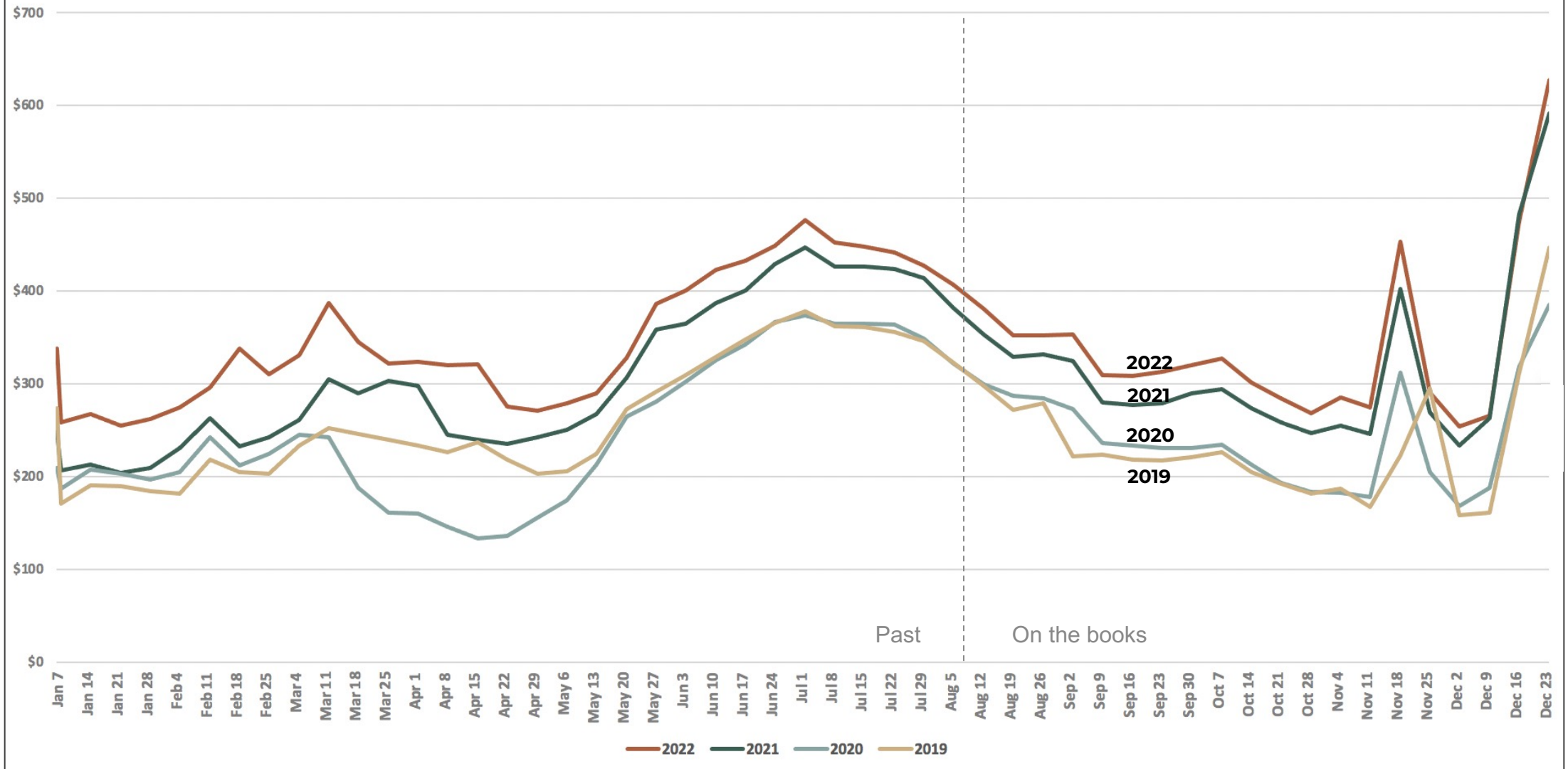
U.S. Adjusted RevPar as of 6/12

(and same day of week prior years)



U.S. ADR

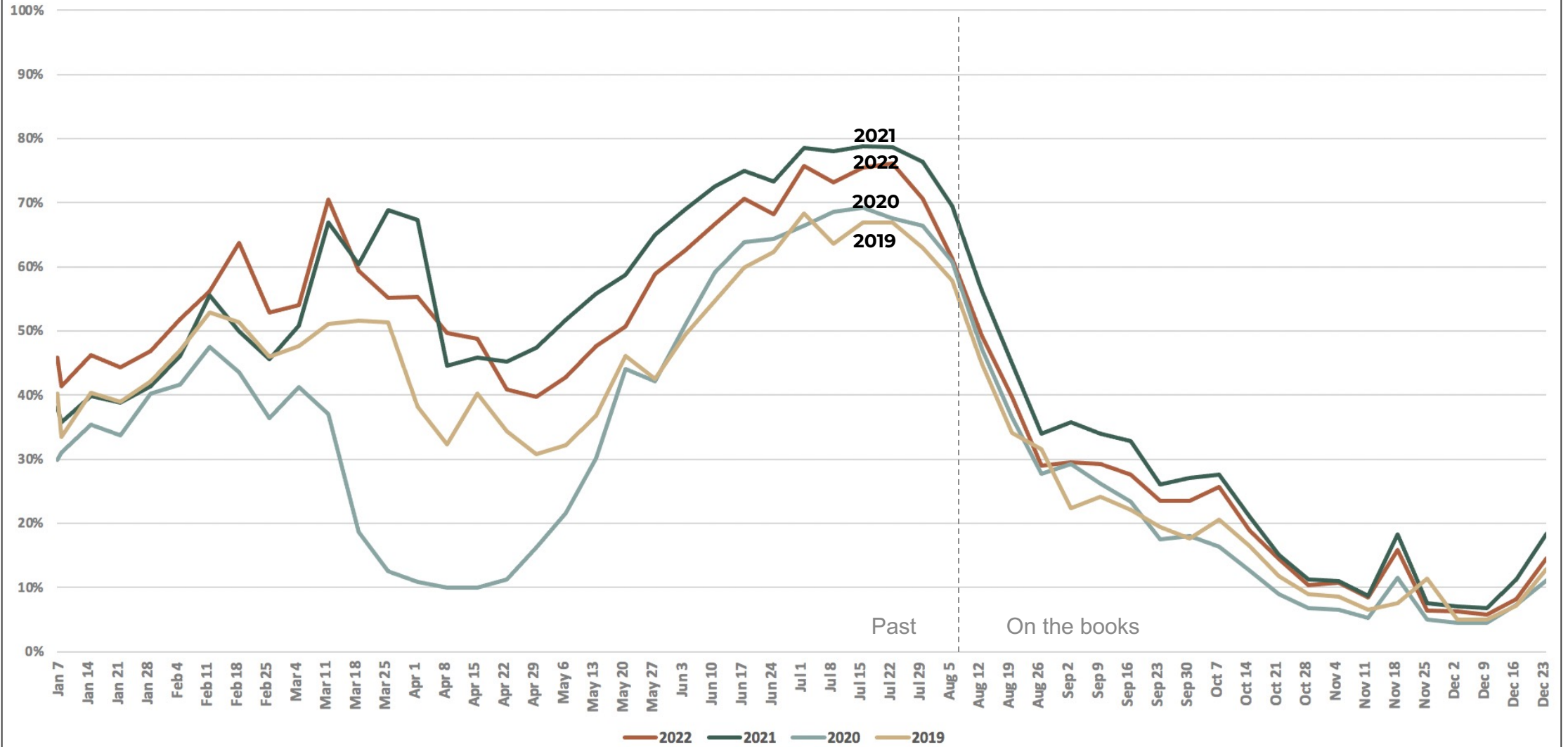
as of 8/5/22
(and same day of week in prior years)



U.S. Adj. Paid Occupancy

as of 8/5/22

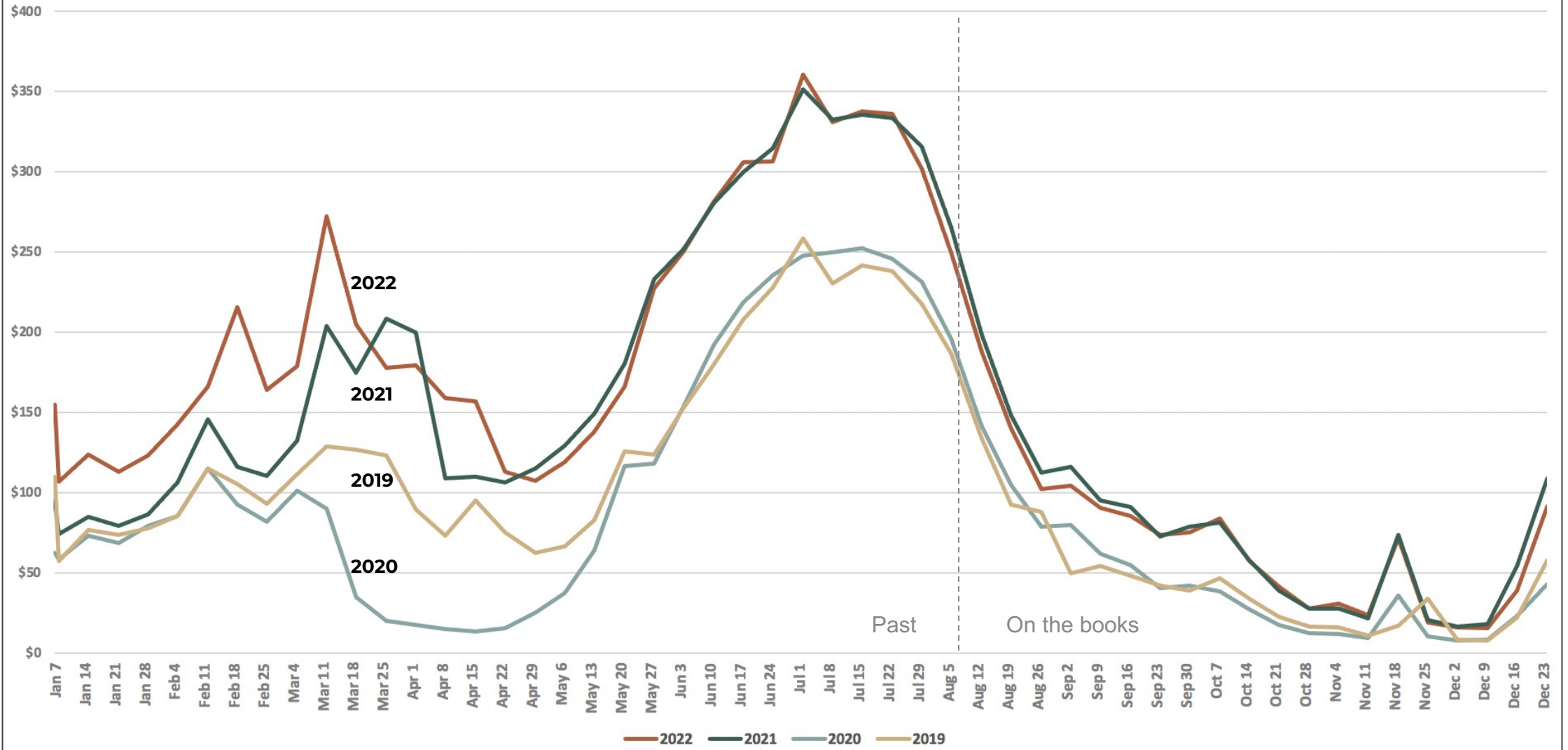
(and same day of week in prior years)

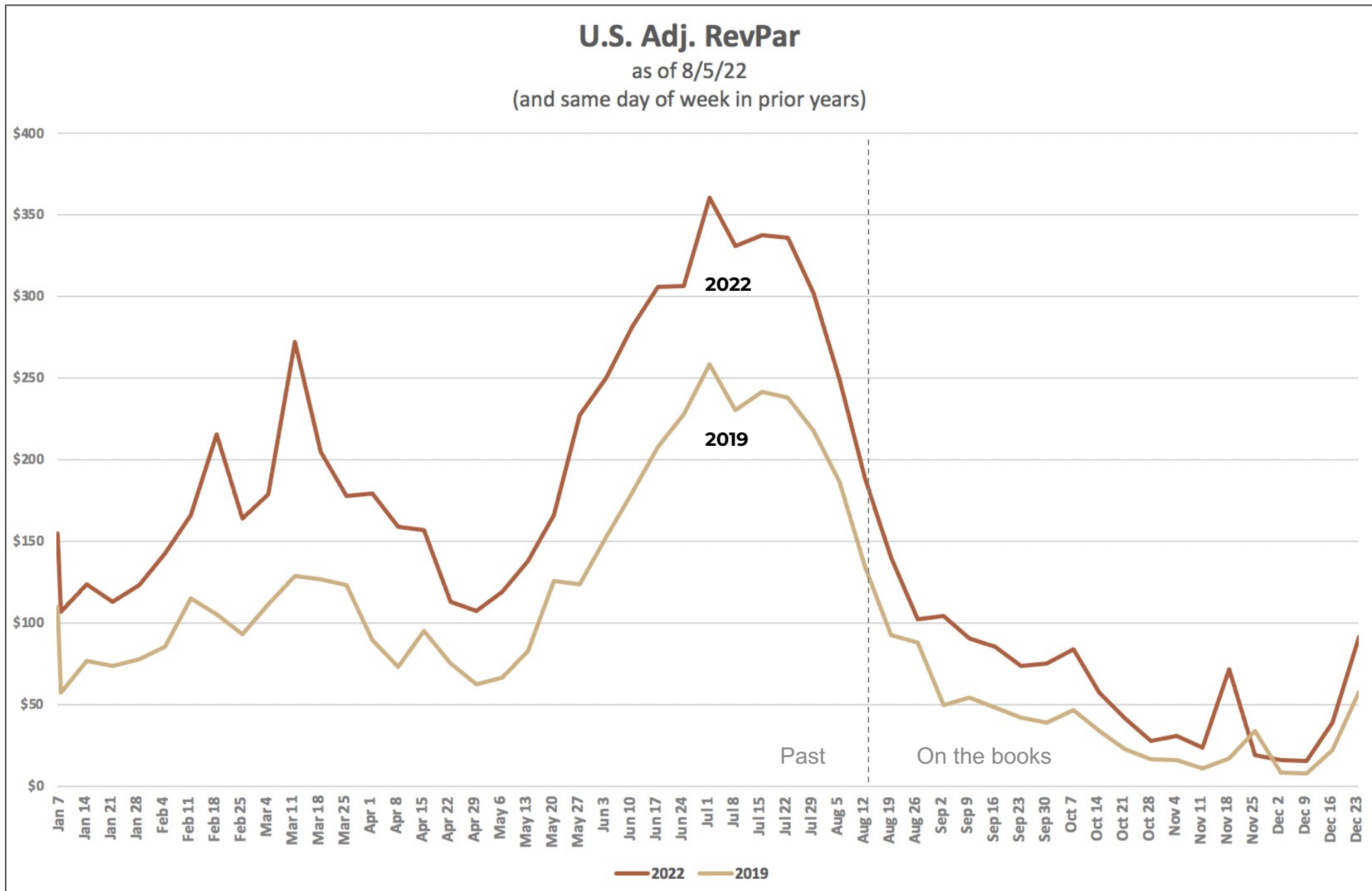


U.S. Adj. RevPar

as of 8/5/22

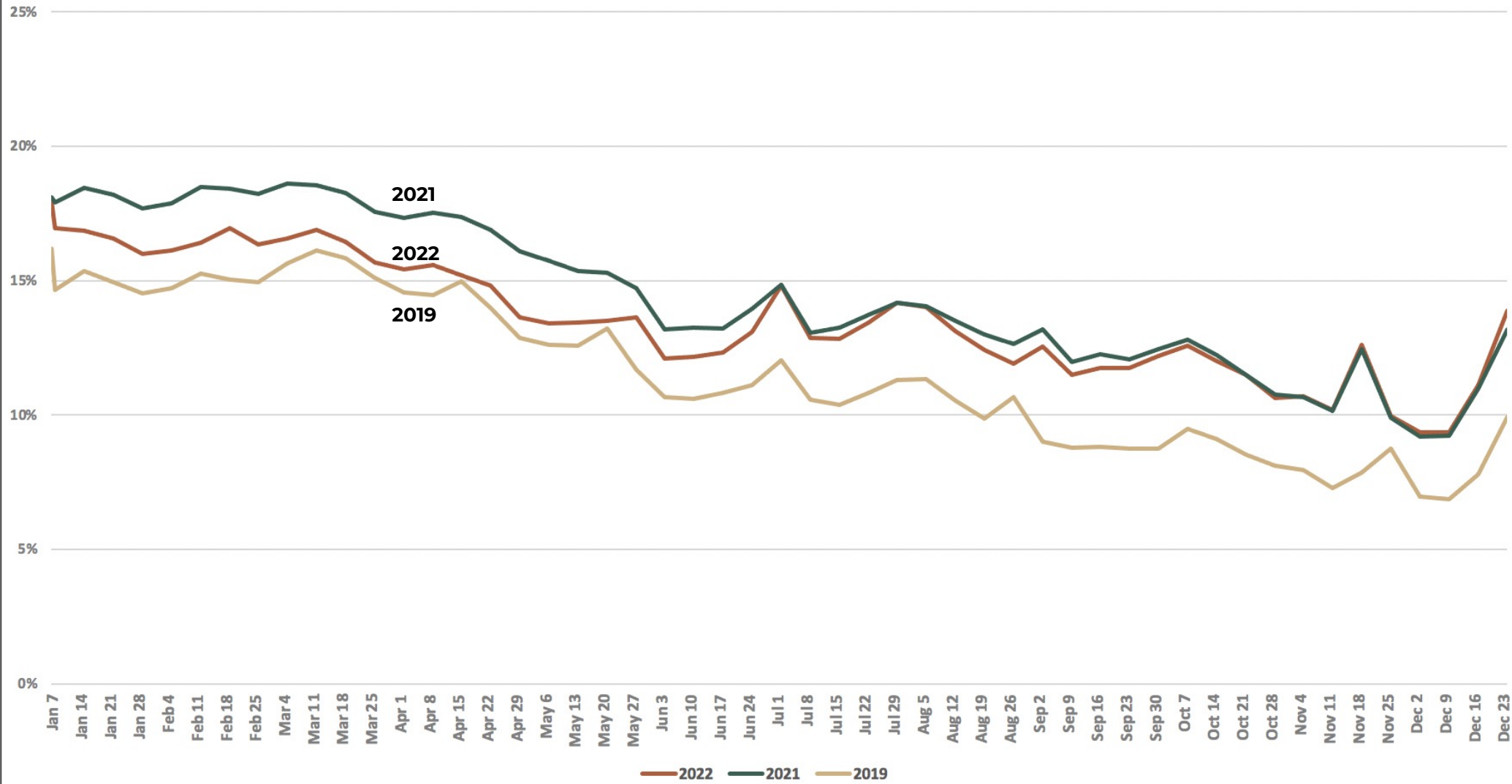
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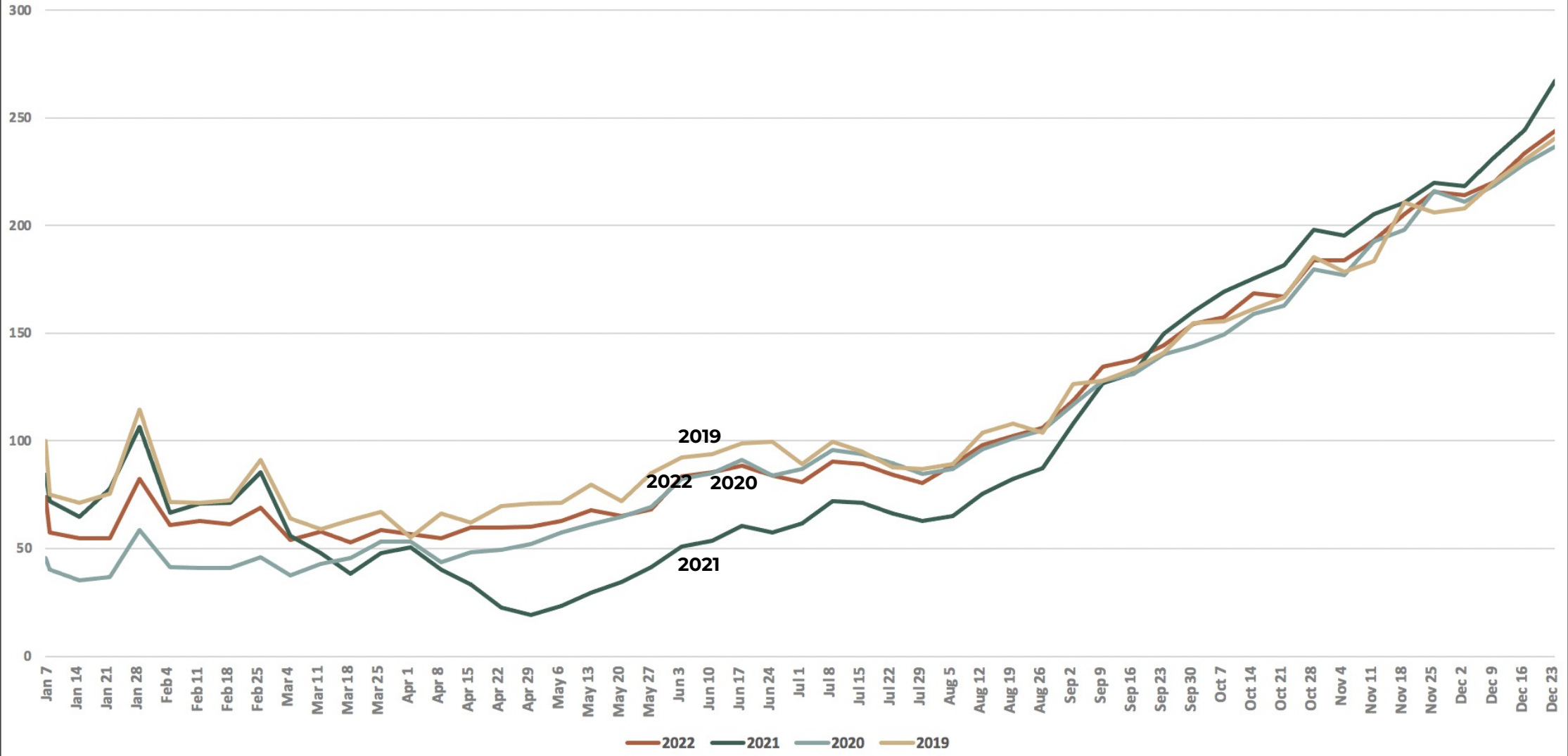
U.S. Owner Occupancy

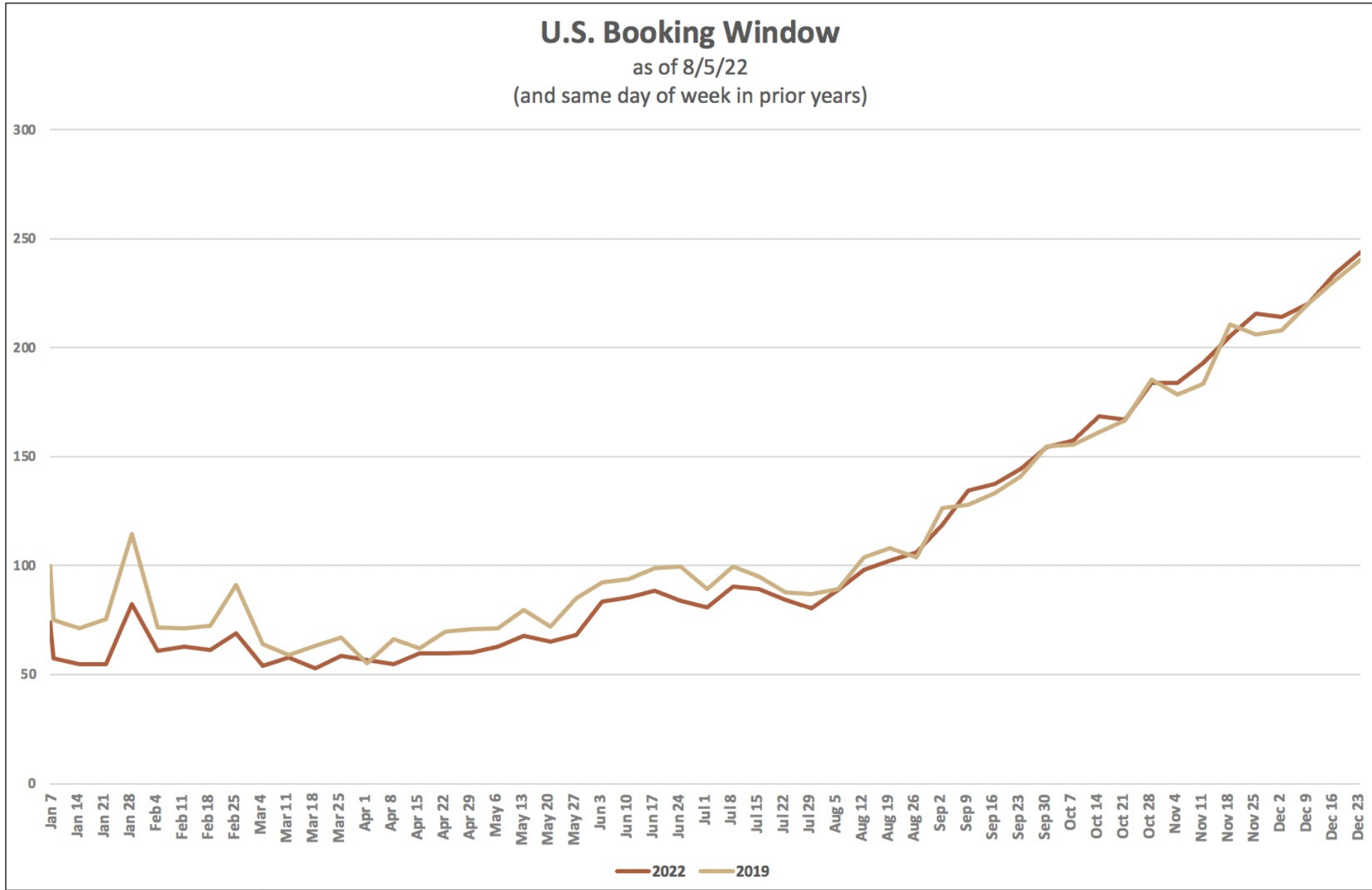
as of 8/5/22
(and same day of week in prior years)



U.S. Booking Window

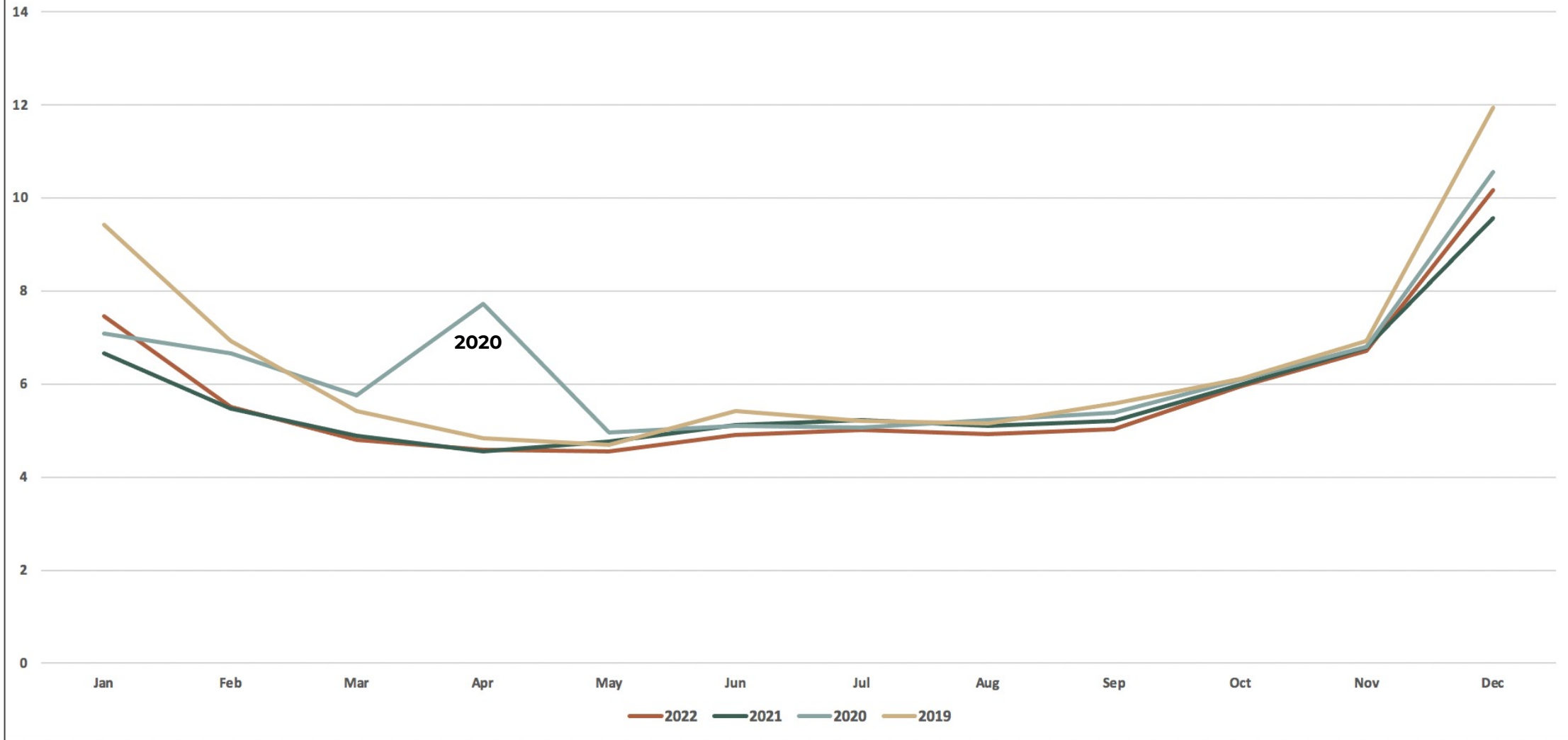
as of 8/5/22
(and same day of week in prior years)

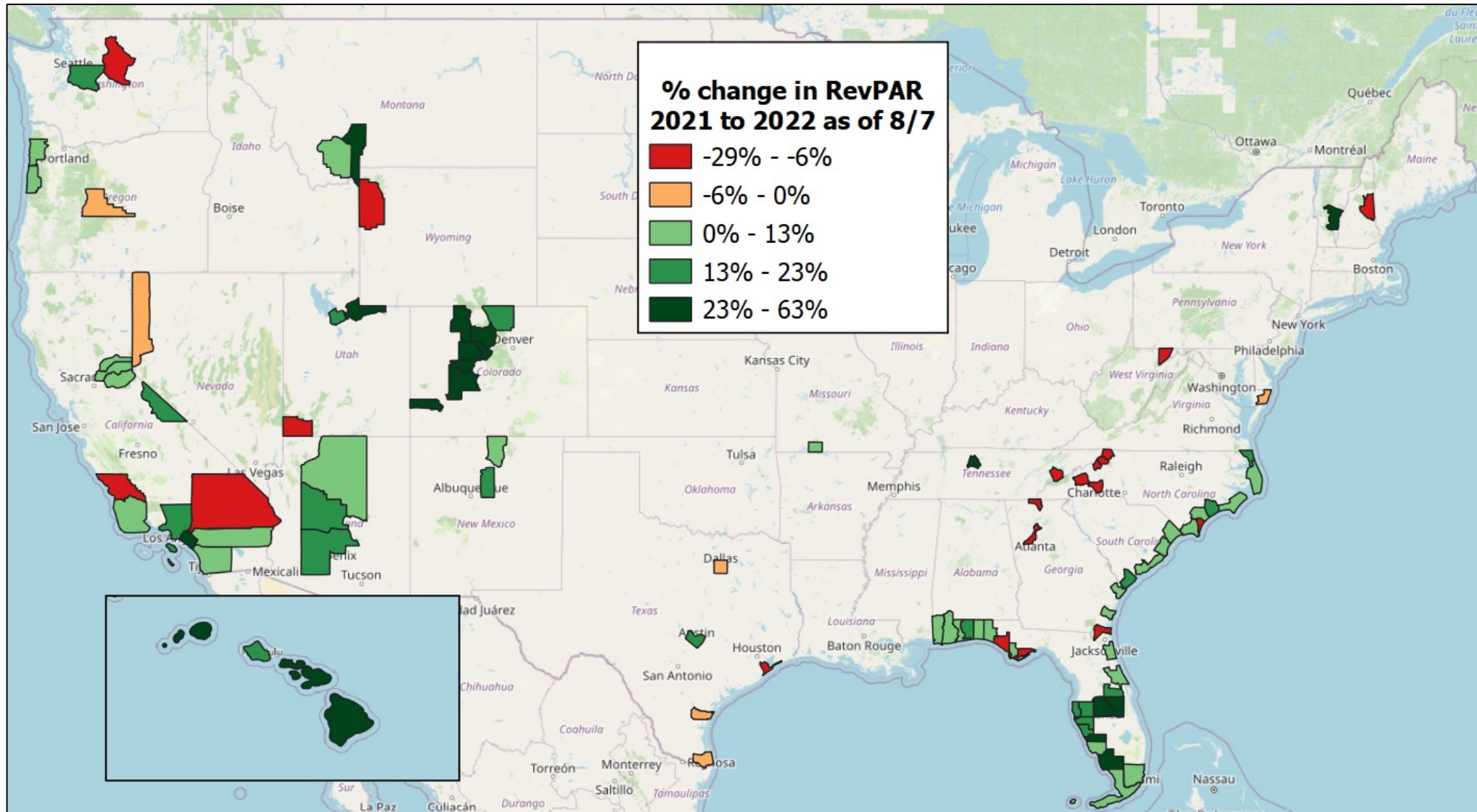


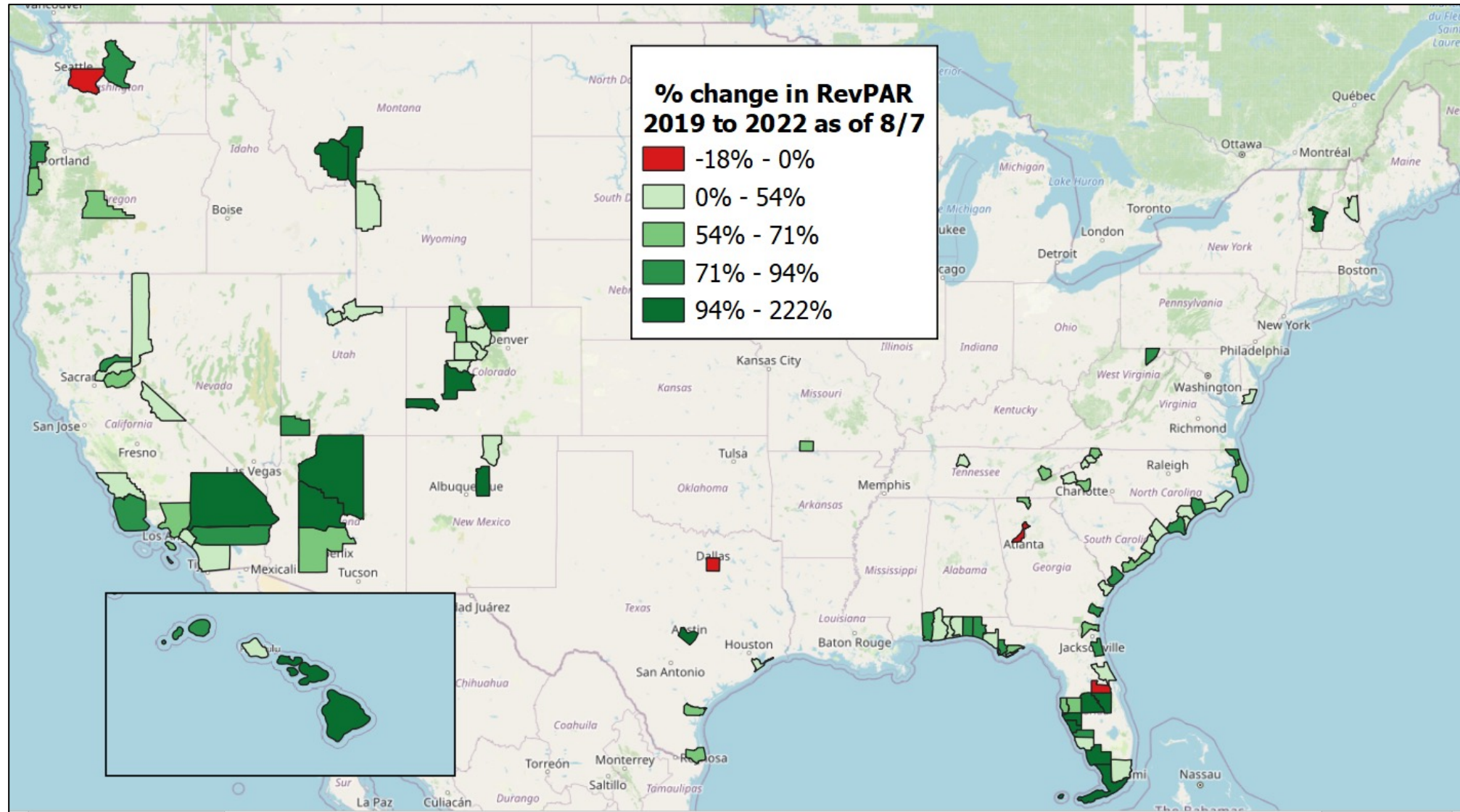


U.S. Avg. Length of Stay

as of 8/5/22
(and same day of week in prior years)





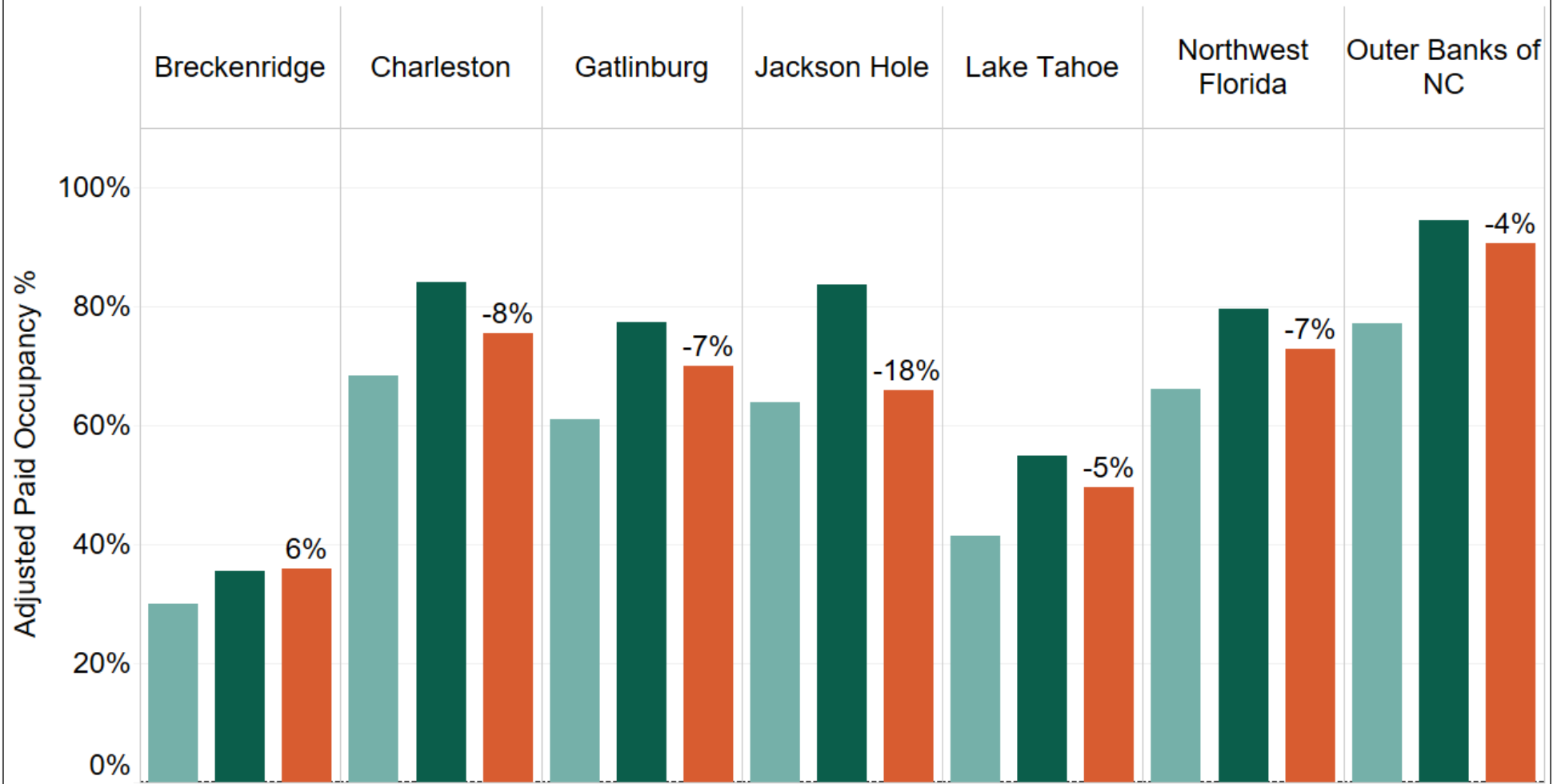


Summer 2022: Leisure Markets Occupancy Lower than 2021

Adjusted Paid Occupancy Rate for June - August

All years as of July 27.

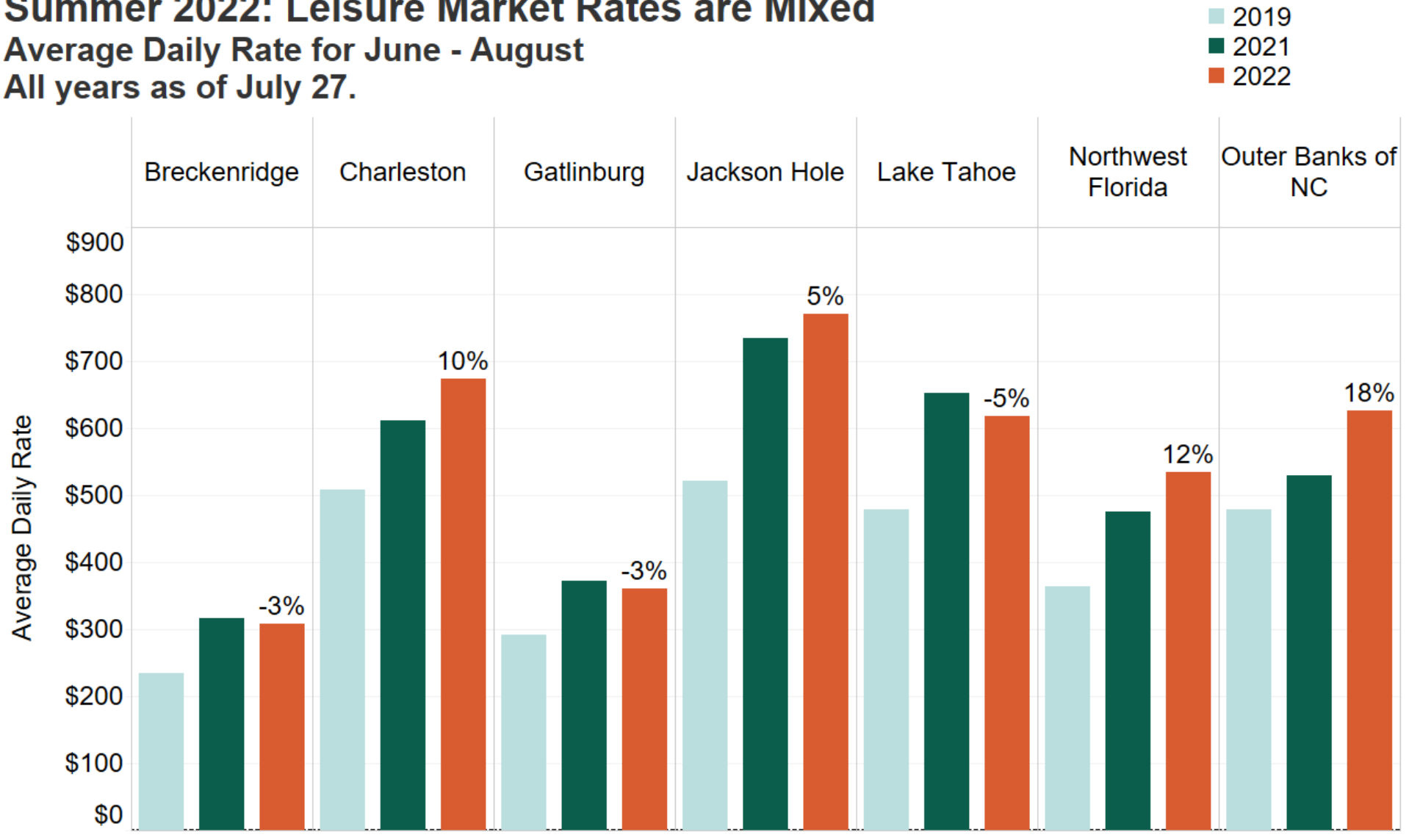
2019
2021
2022



Summer 2022: Leisure Market Rates are Mixed

Average Daily Rate for June - August

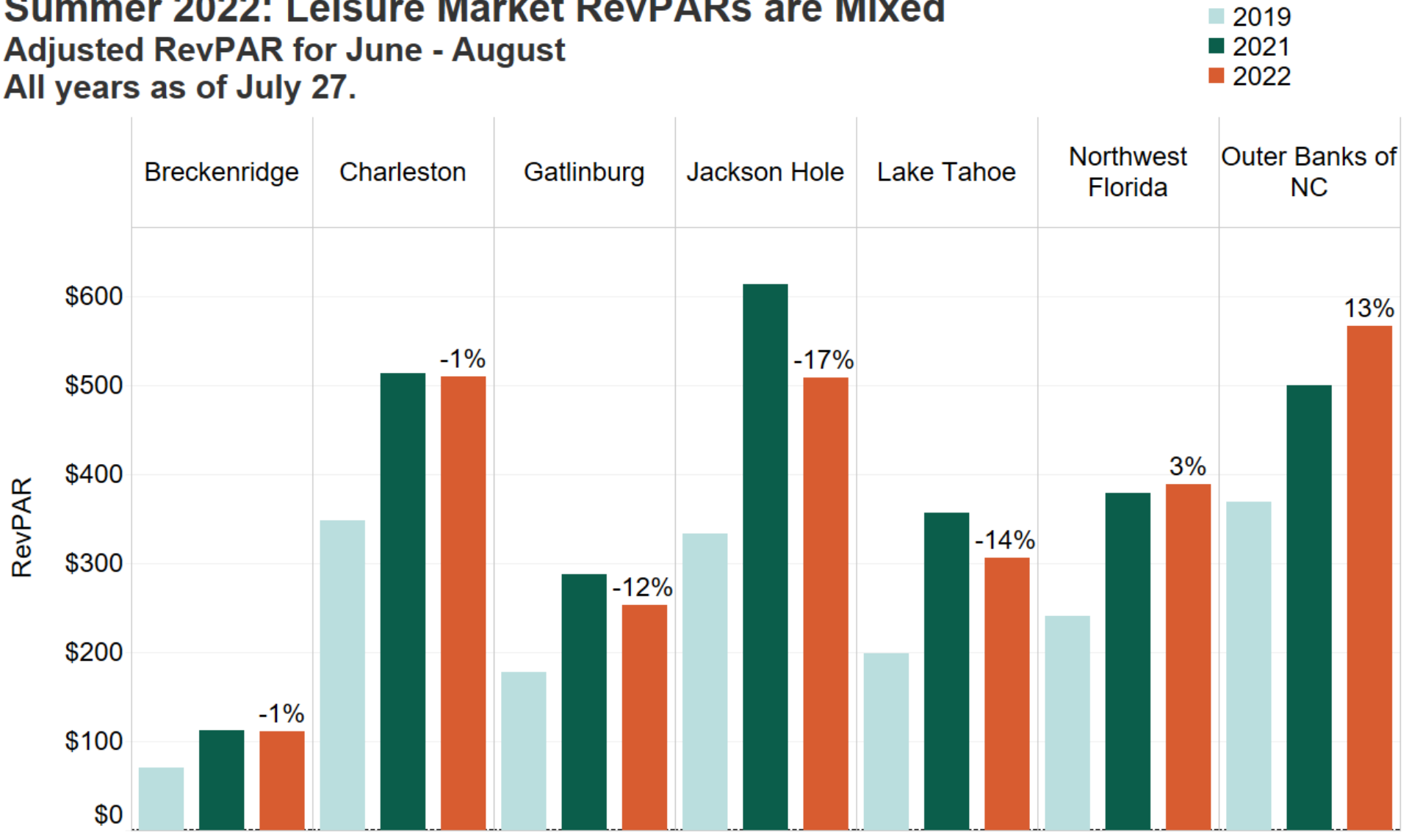
All years as of July 27.



Summer 2022: Leisure Market RevPARs are Mixed

Adjusted RevPAR for June - August

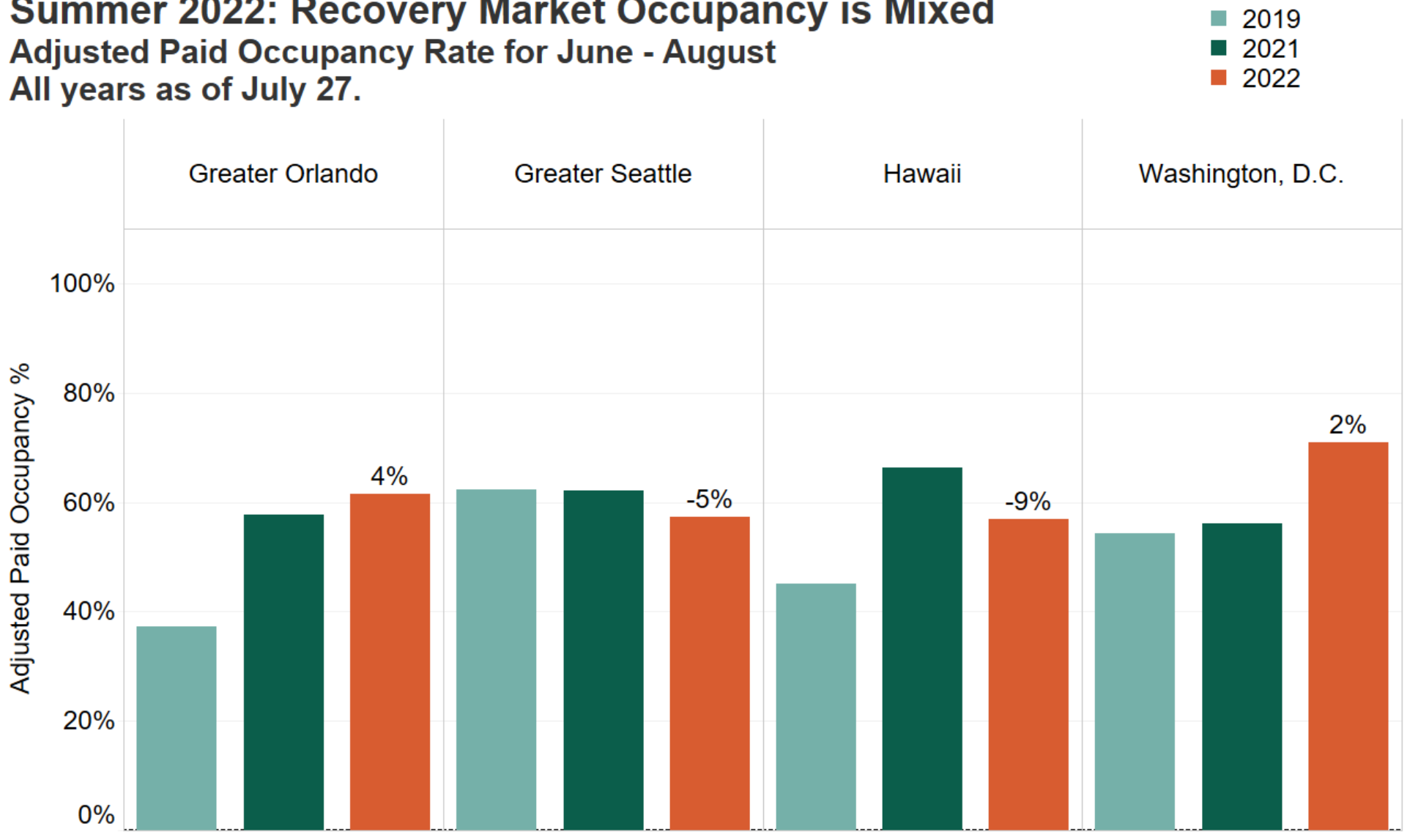
All years as of July 27.



Summer 2022: Recovery Market Occupancy is Mixed

Adjusted Paid Occupancy Rate for June - August

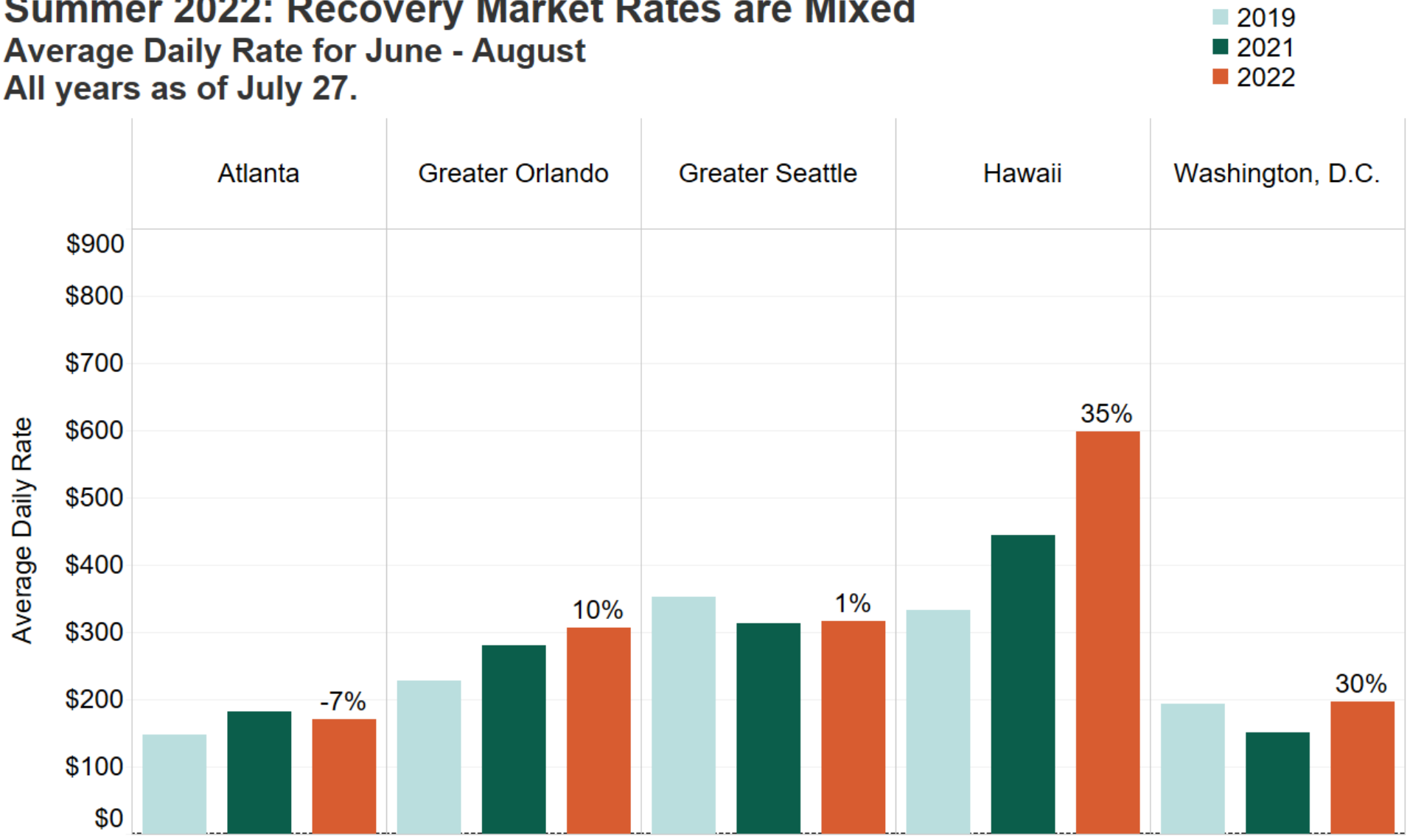
All years as of July 27.



Summer 2022: Recovery Market Rates are Mixed

Average Daily Rate for June - August

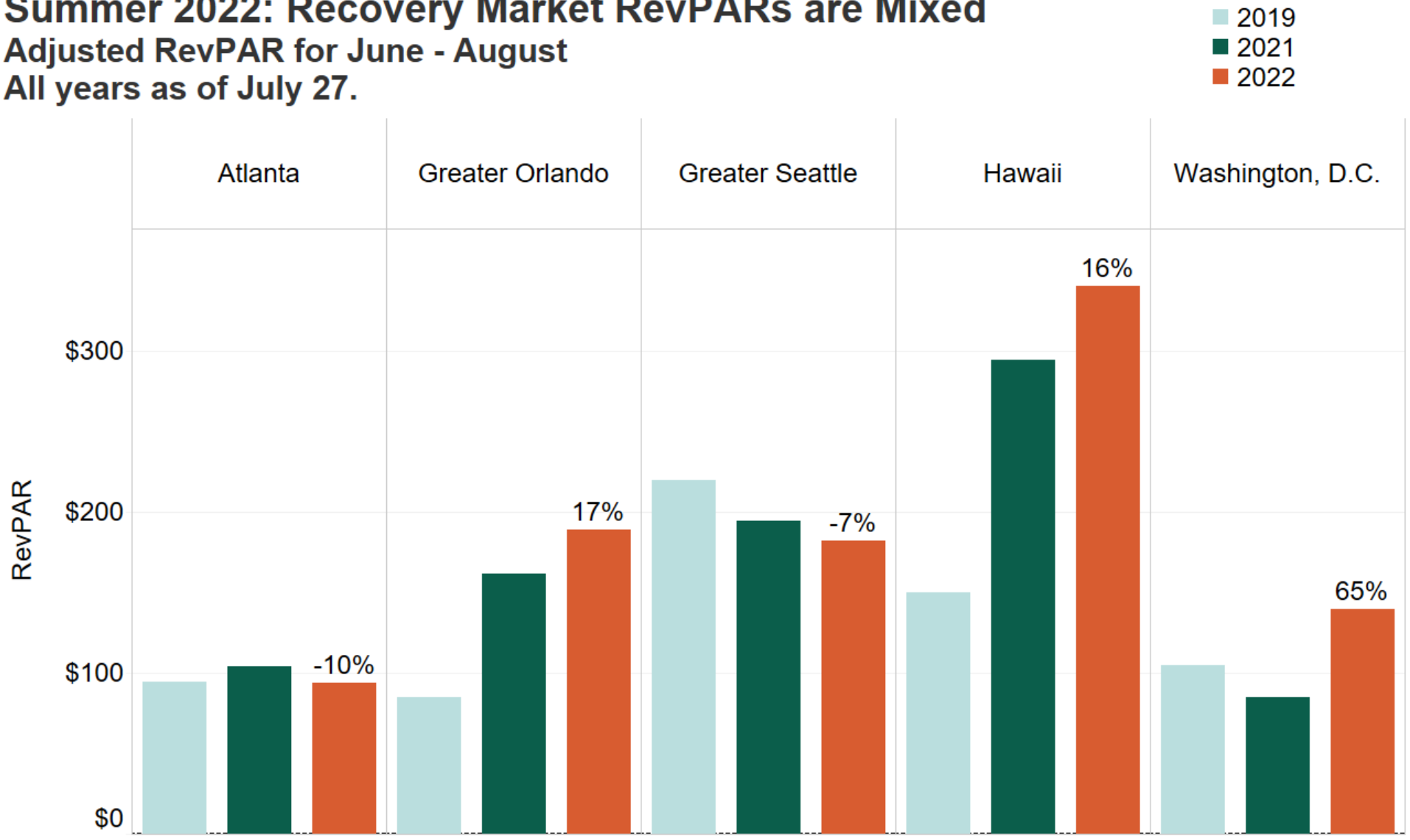
All years as of July 27.



Summer 2022: Recovery Market RevPARs are Mixed

Adjusted RevPAR for June - August

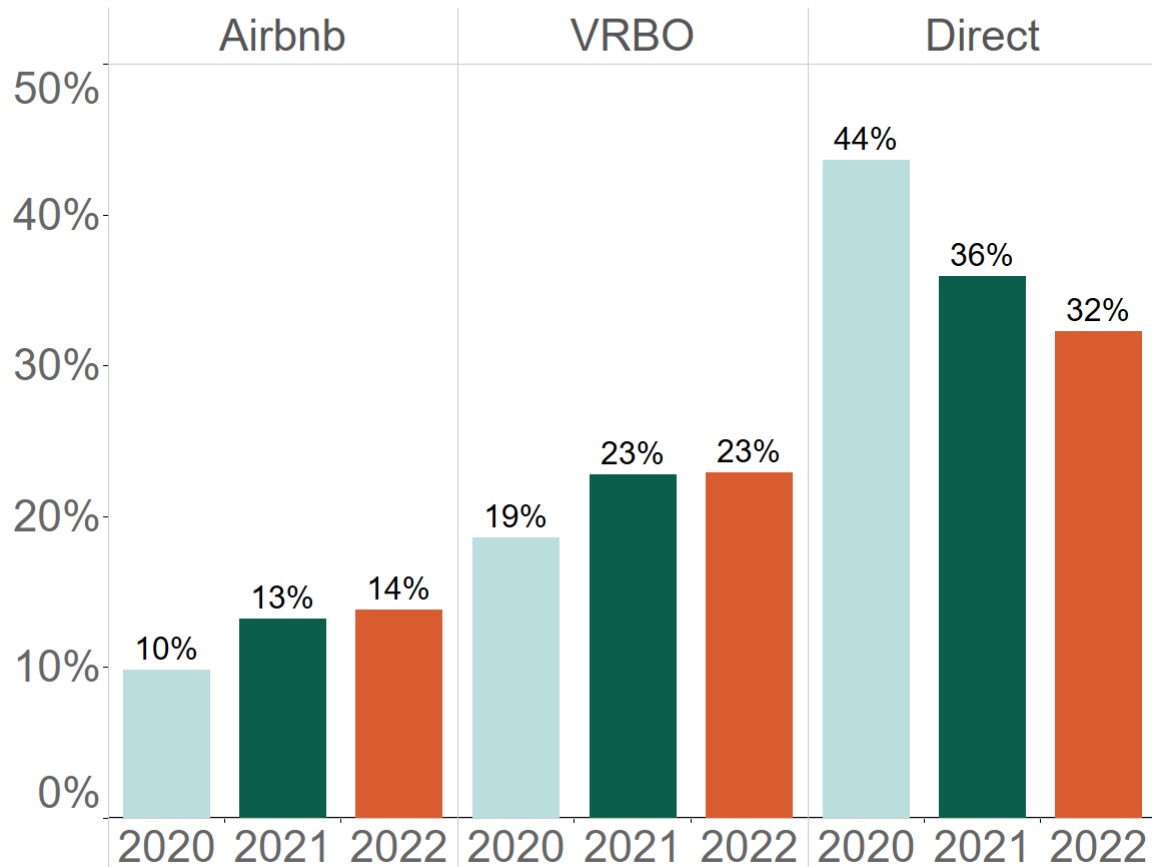
All years as of July 27.



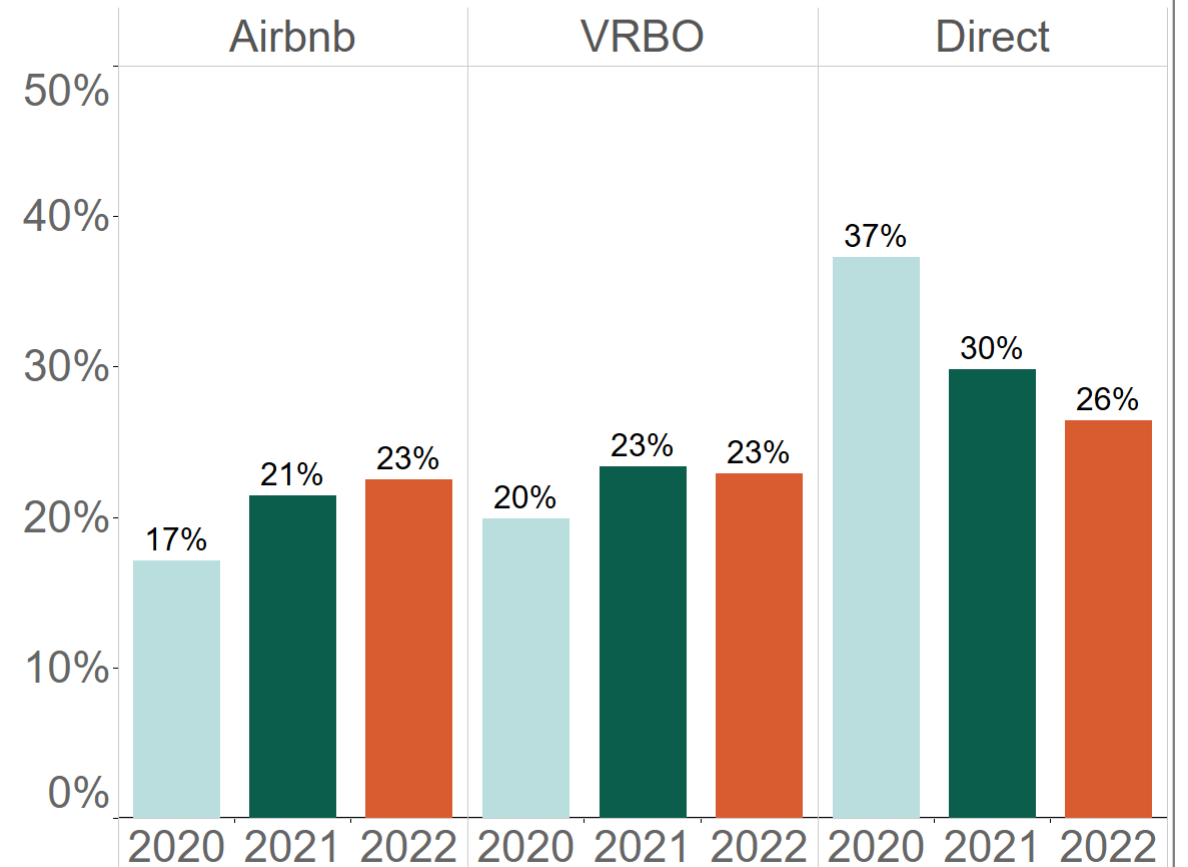
Booking Sources Continue to Shift

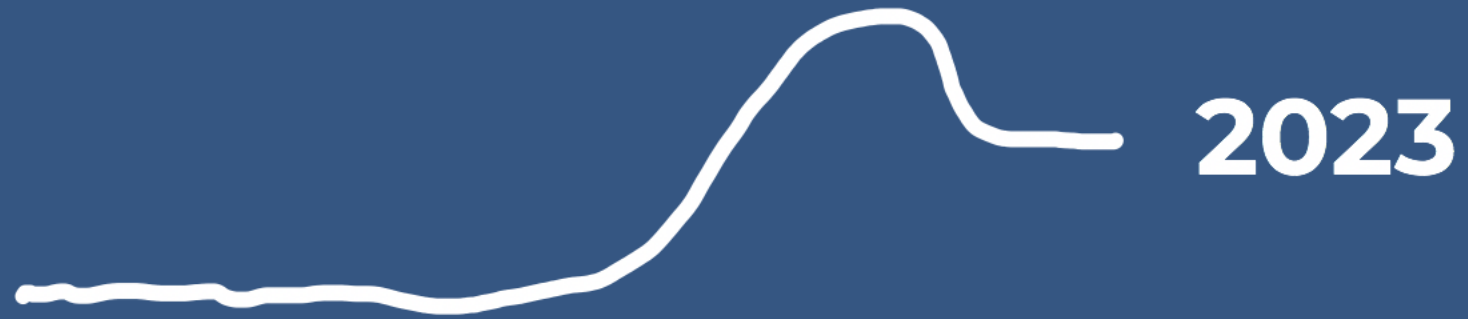
Reservations made between January 1 and July 20 each year.
Data sourced directly from property management companies.

% of Unit Revenue



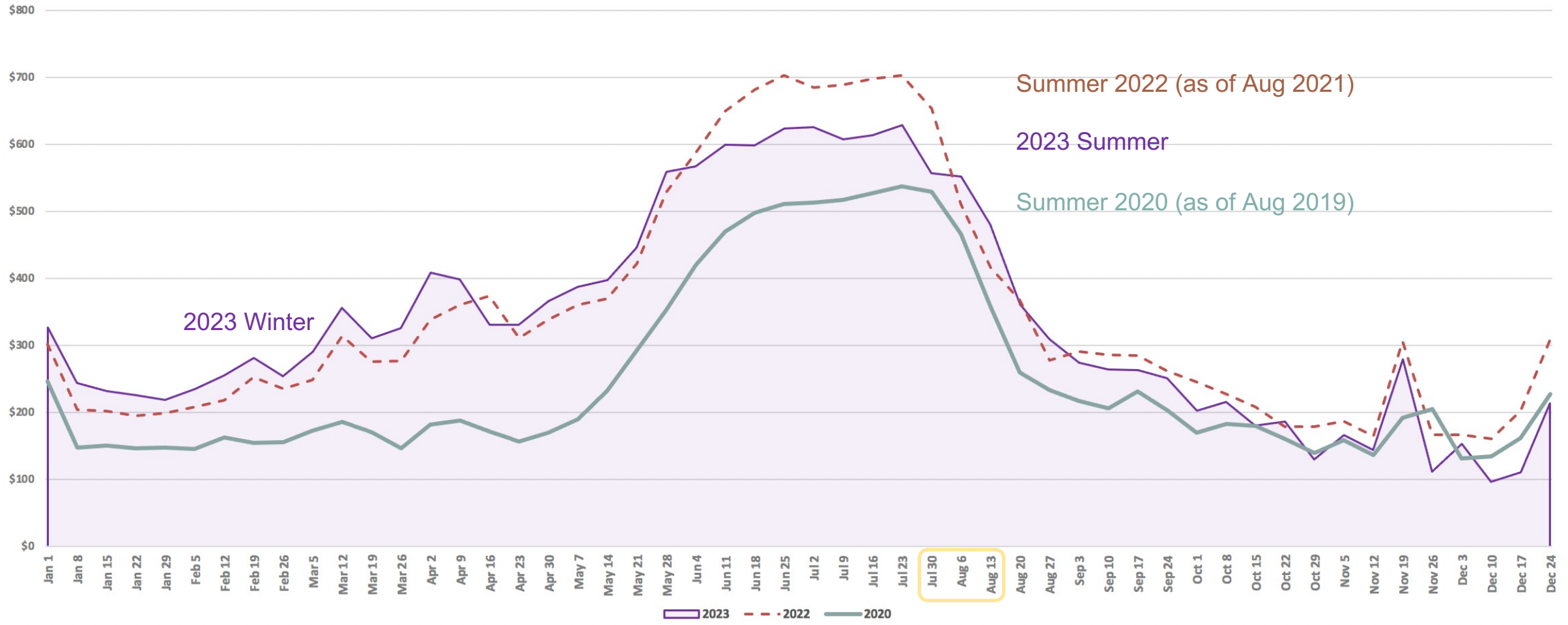
% of Guest Checkins





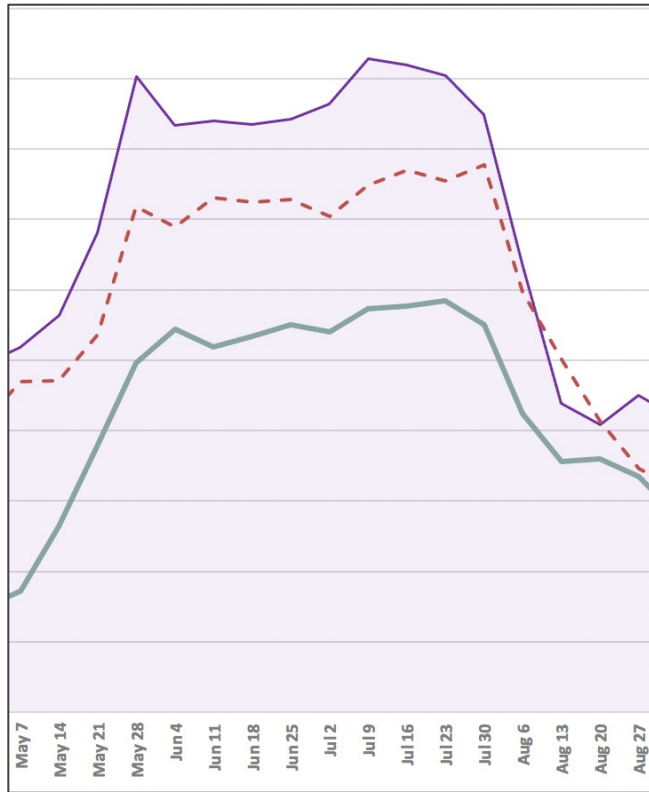
U.S. ADR - 2023 OUTLOOK

as of 8/5/22
(and same day of week in prior years)

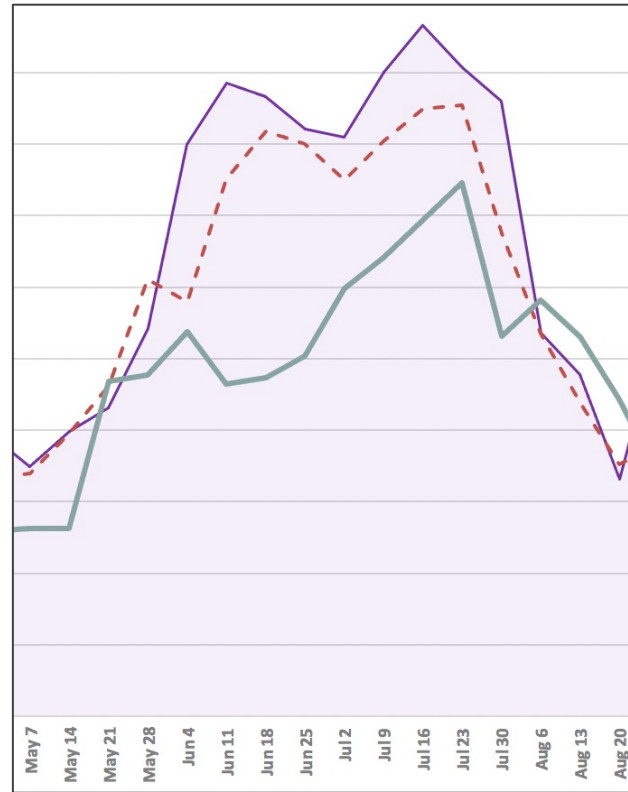


Still Pushing Summer ADR

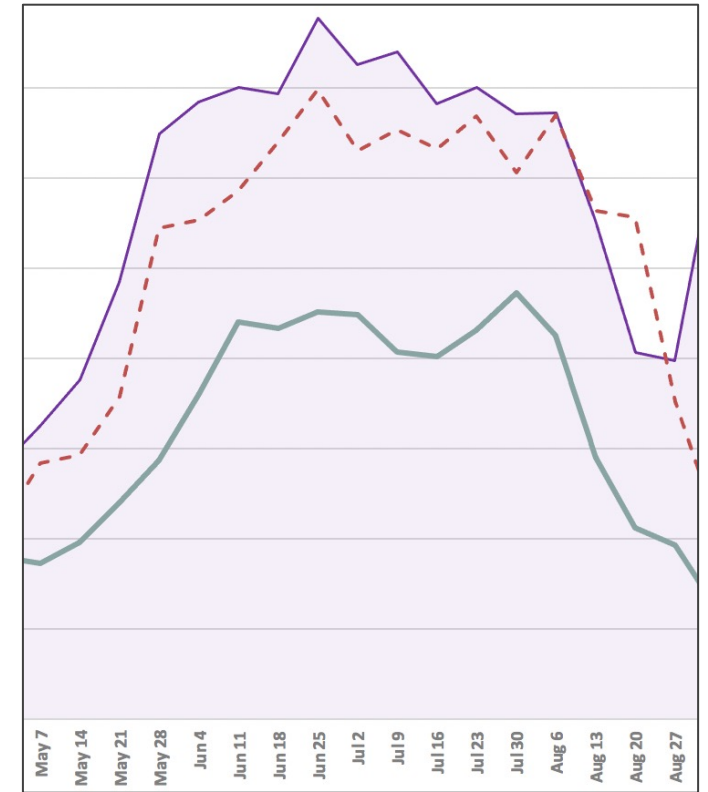
FL – AL PANHANDLE



TN Smokies

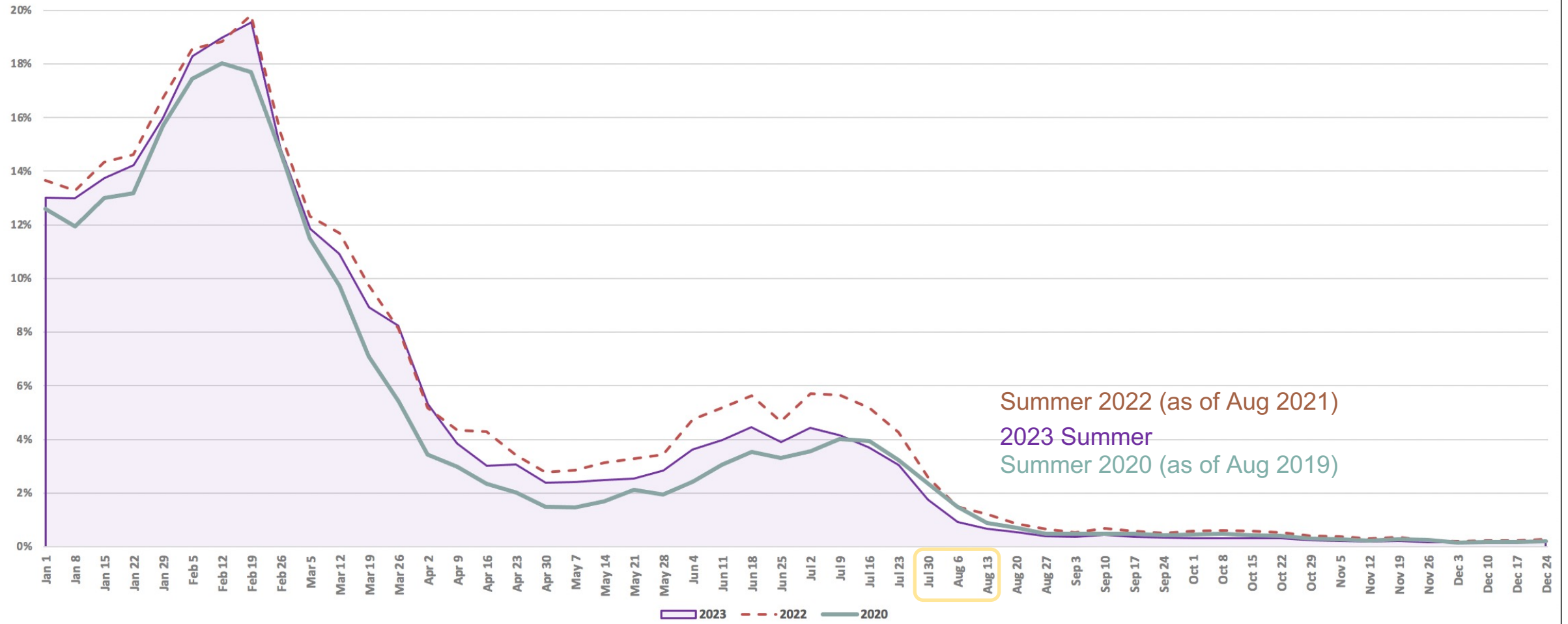


Hilton Head



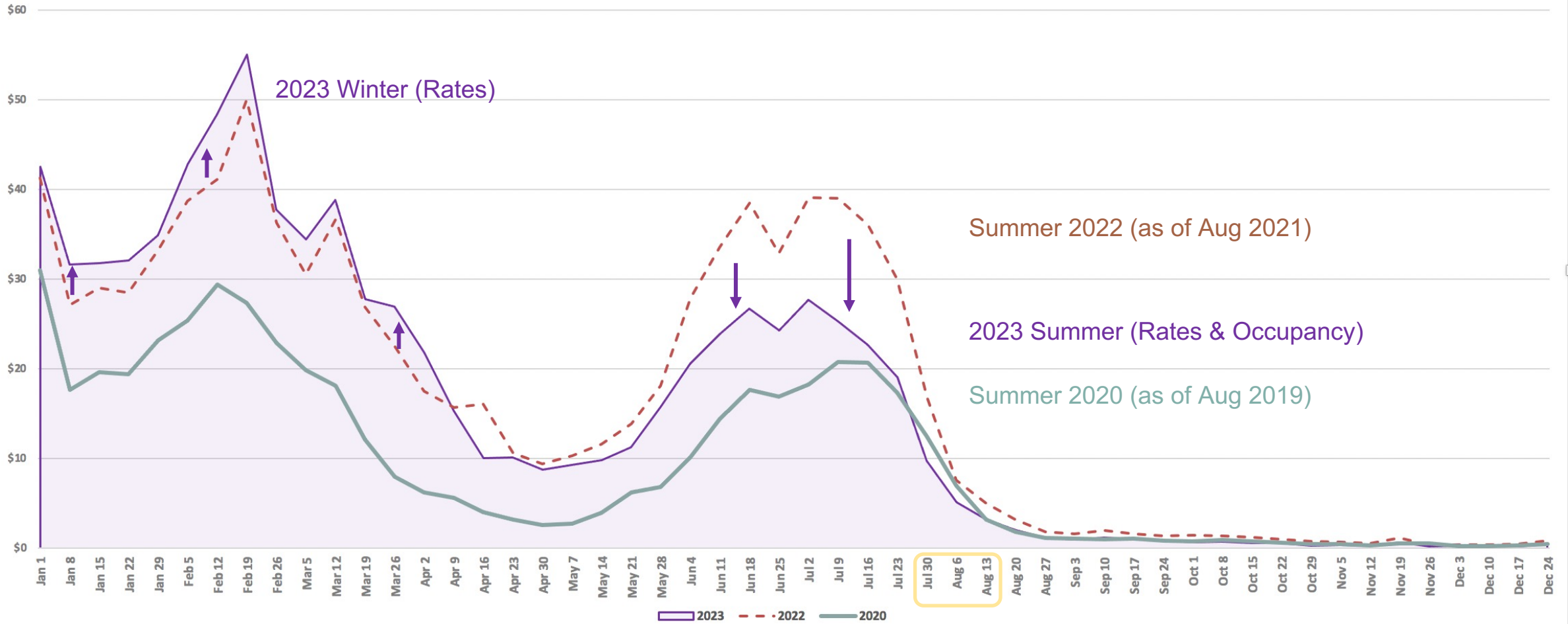
U.S. Adj Paid Occupany - 2023 OUTLOOK

as of 8/5/22
(and same day of week in prior years)



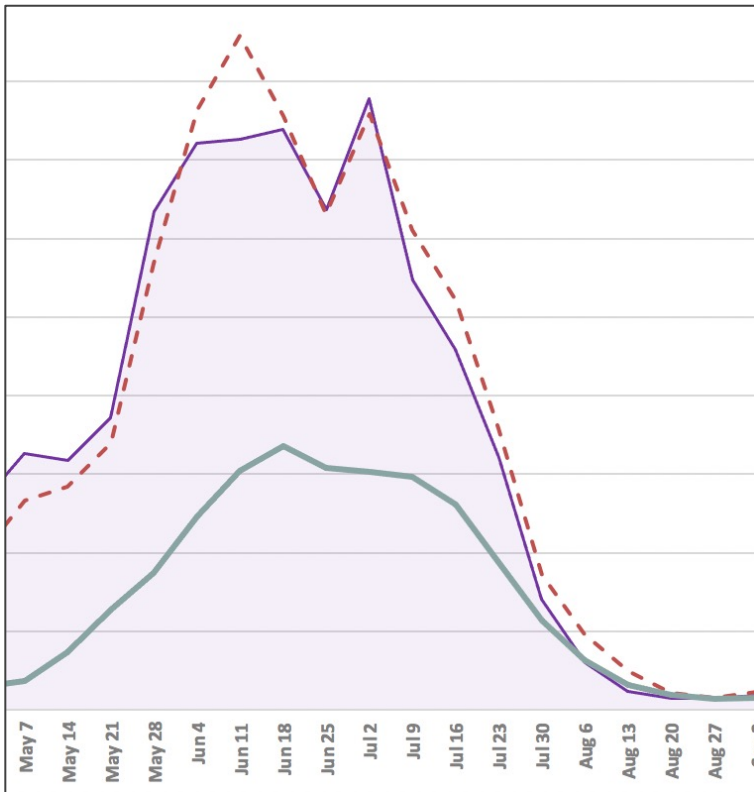
U.S. Adj RevPar - 2023 OUTLOOK

as of 8/5/22
(and same day of week in prior years)

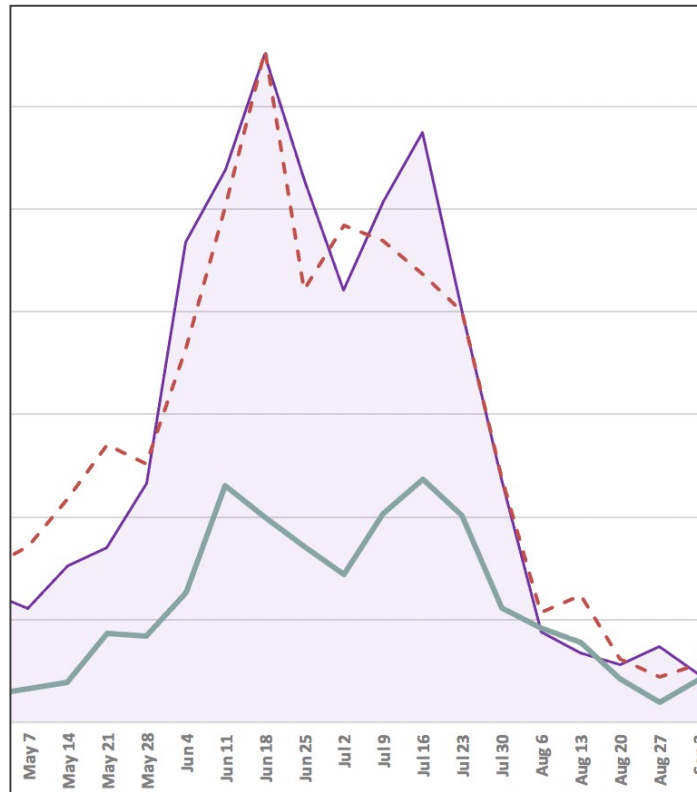


Adj. RevPar

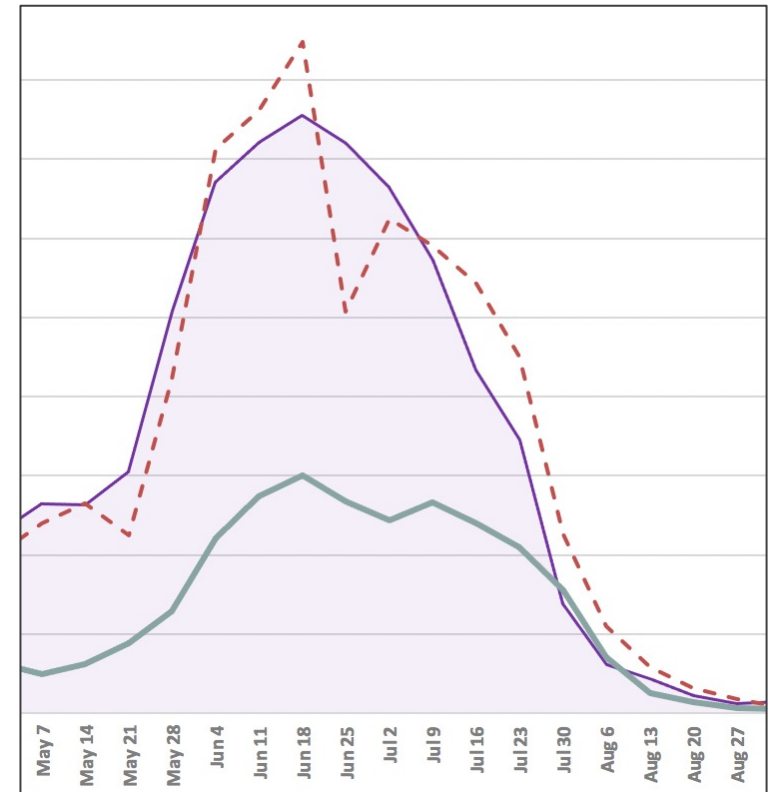
FL – AL PANHANDLE



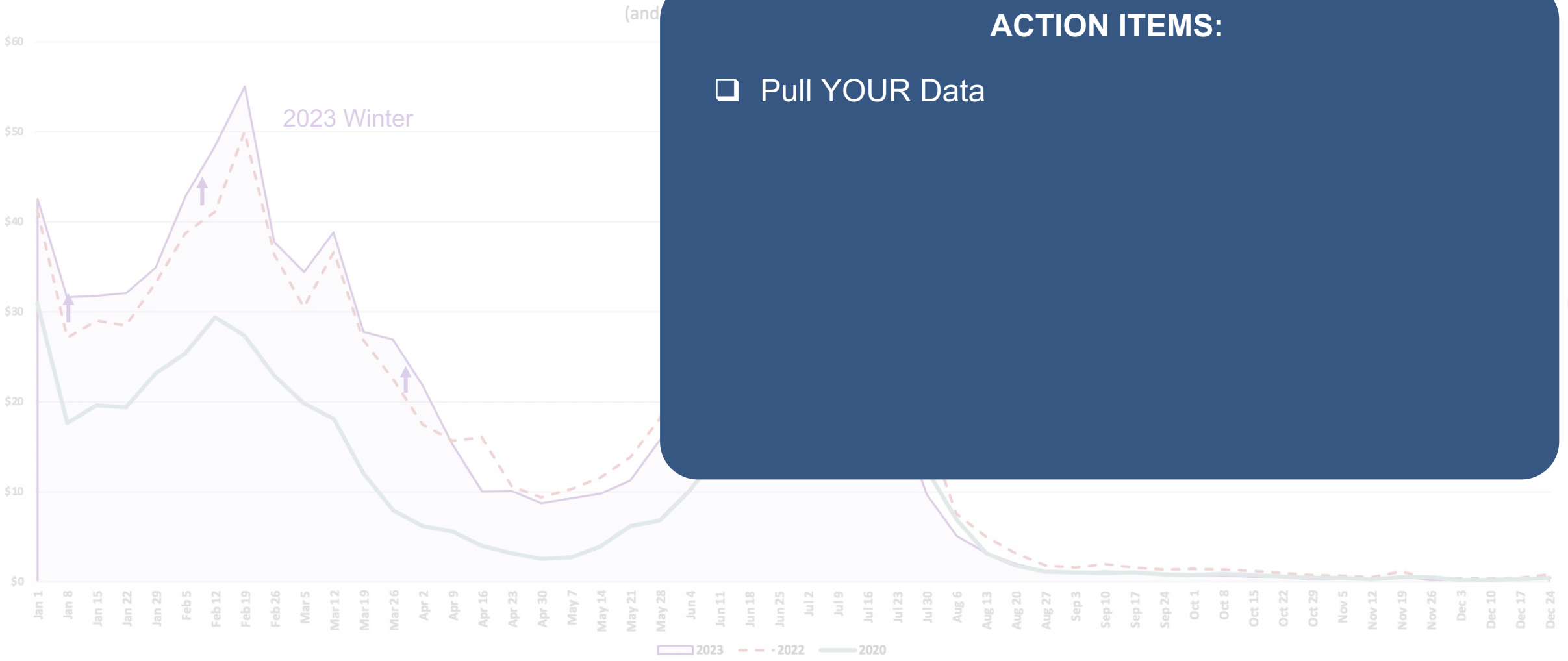
TN Smokies



Hilton Head



U.S. Adj RevPar - 2023 OUTLOOK

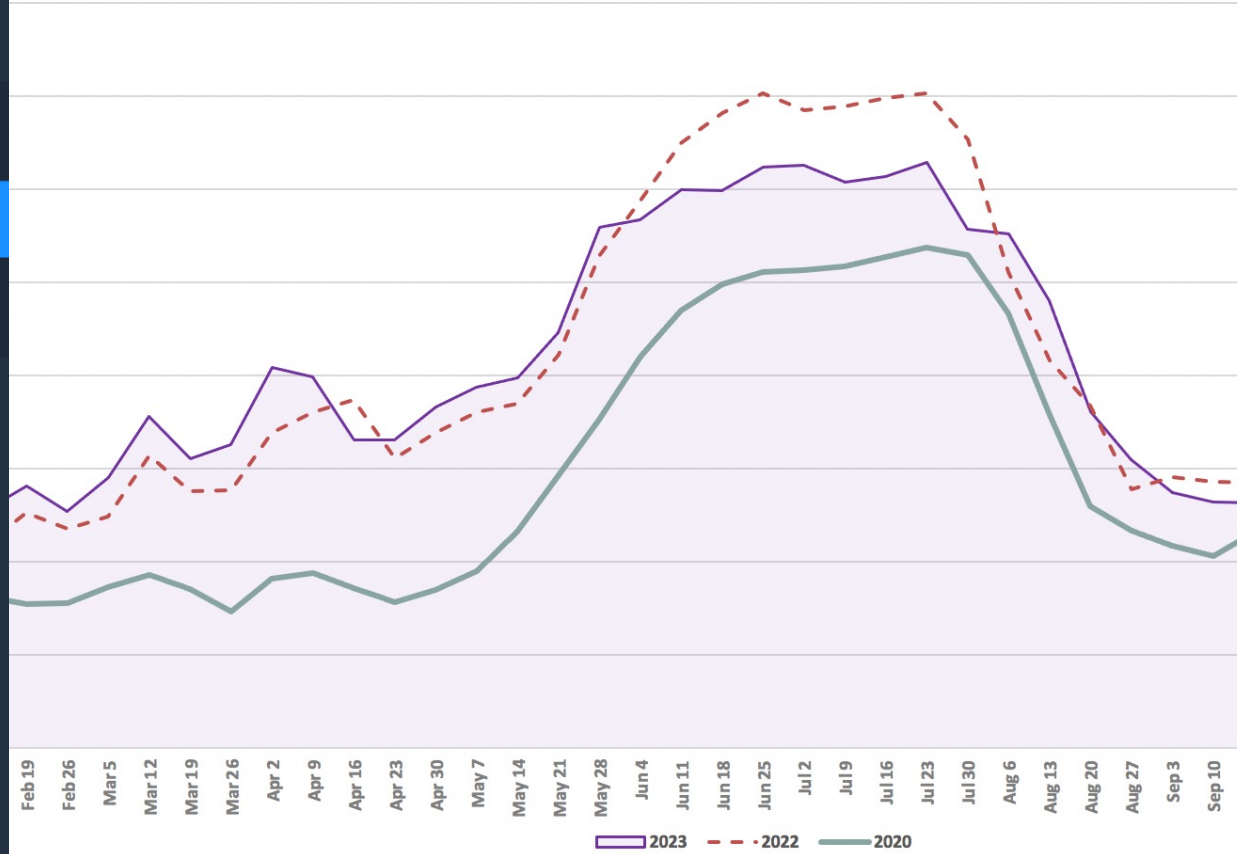


KEYDATA™

- My Reports
- Company
- Snapshot - Annual
- Pacing Detail**
- Markets
- Units
- Market Insights
- Sales
- Marketing Reports
- Business Development
- Budgeting
- Marketplace

U.S. ADR - 2023 OUTLOOK

as of 8/5/22
(and same day of week in prior years)



Arrival Dates

Jan 2023

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Primary Date Range

Dec 2023

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Primary: Next Calendar Year

1/1/2023 - 12/31/2023

As of: Custom 8/6/2022

Compare Range: Minus One Year

1/1/2022 - 12/31/2022

As of: Today Minus 1 Year (same day of week)

Additional Compare Range: Set custom date...

1/1/2020 - 12/31/2020

As of: Custom 8/11/2019

Cancel Close

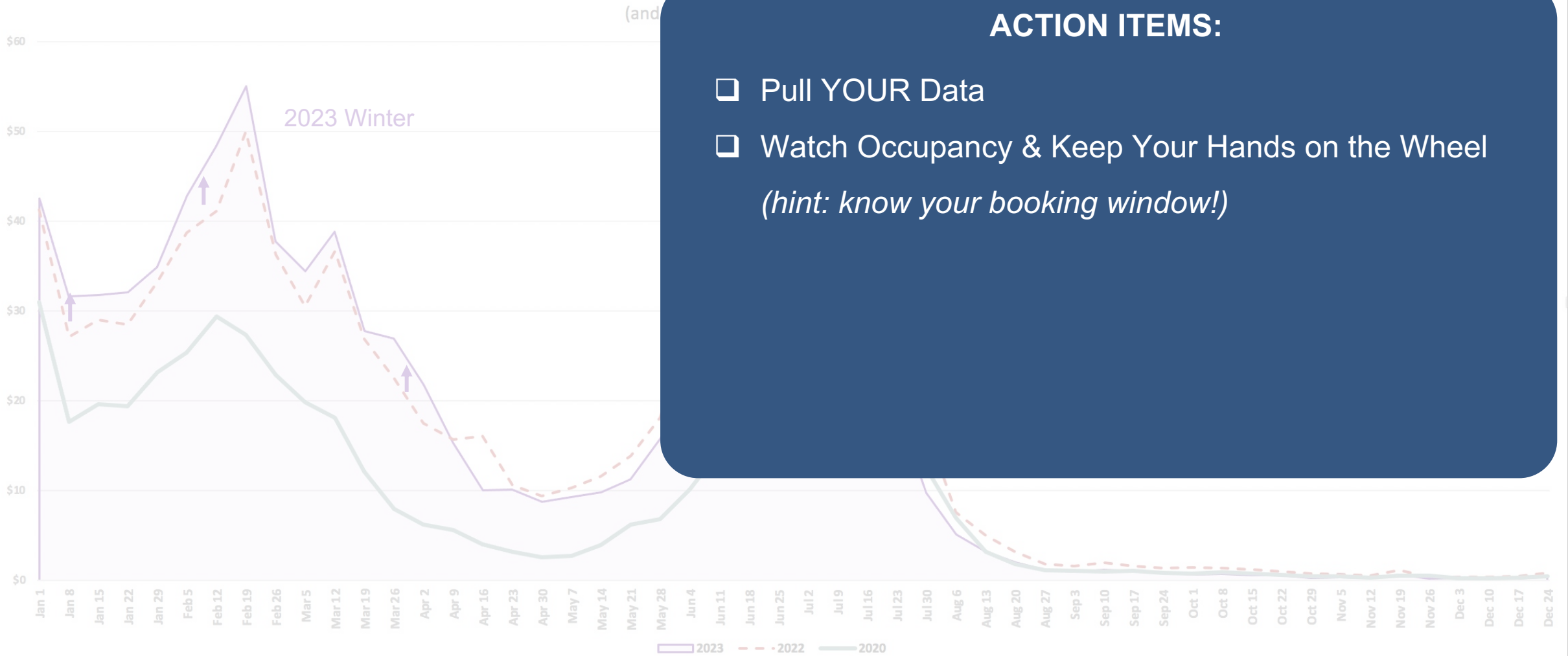
KPI

ADR

Filters and Units

Nothing Set

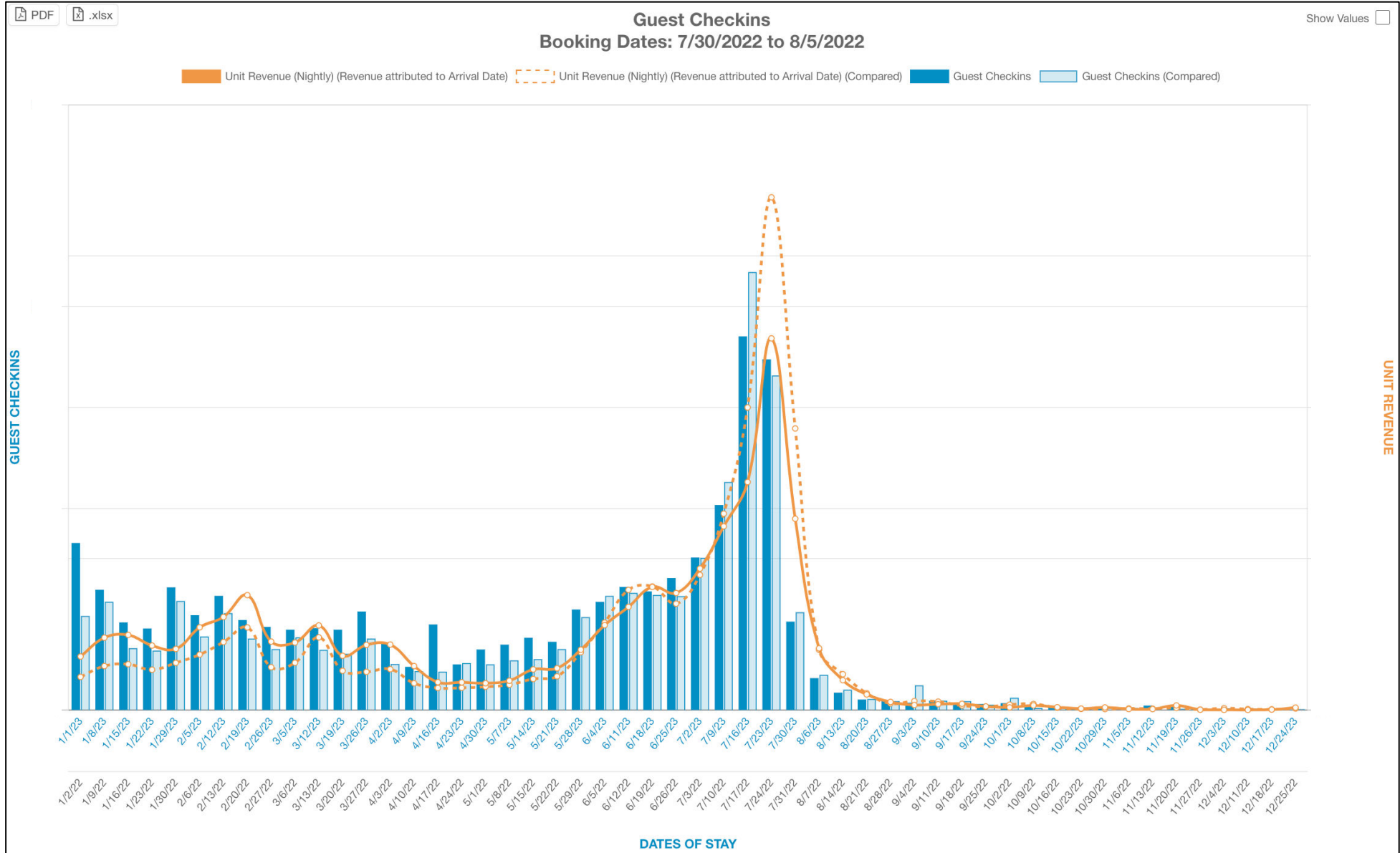
U.S. Adj RevPar - 2023 OUTLOOK



What are you Booking Now?

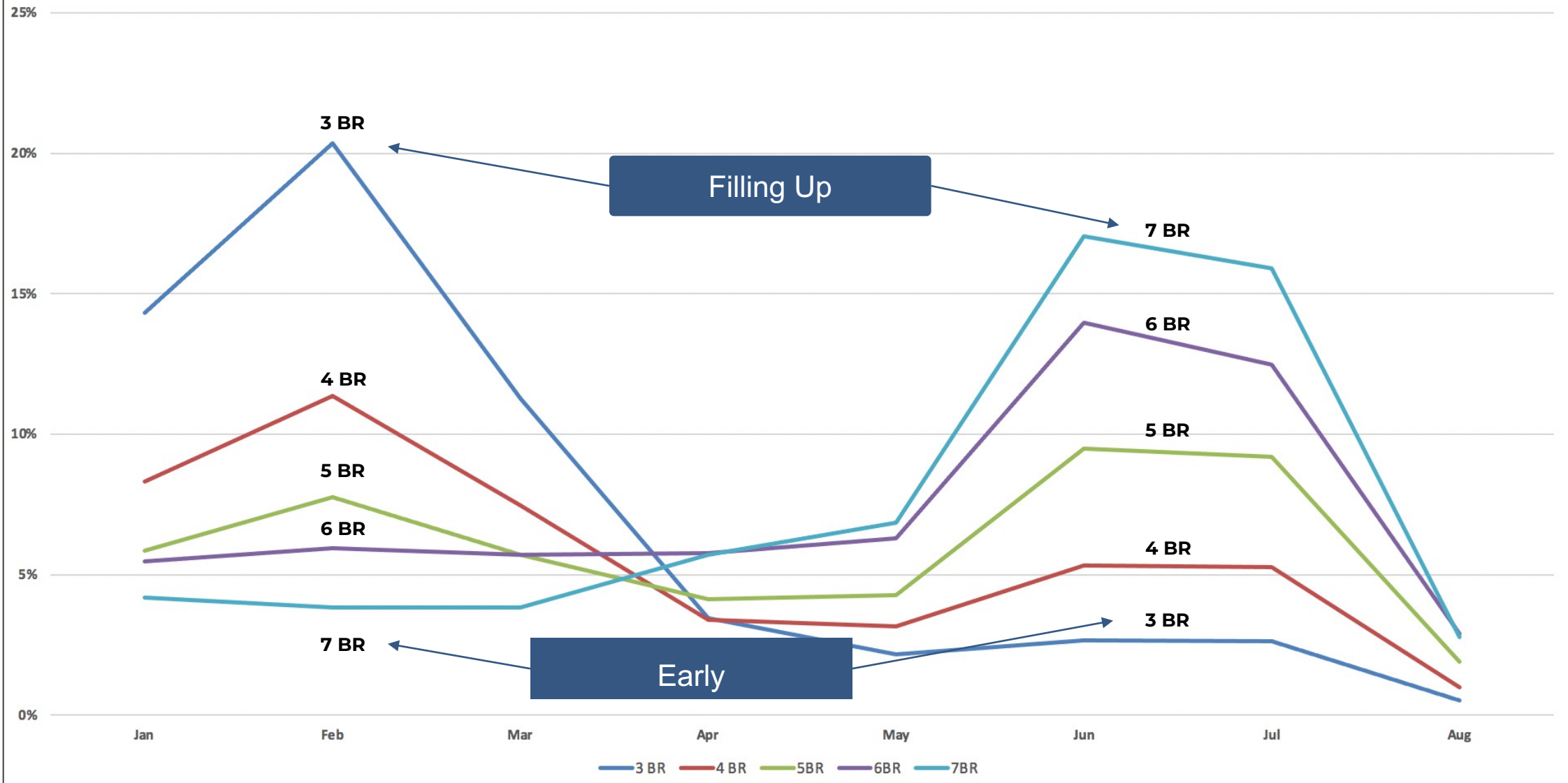
Slowest 4/9 & 4/23

Busiest 7/16 & 7/23

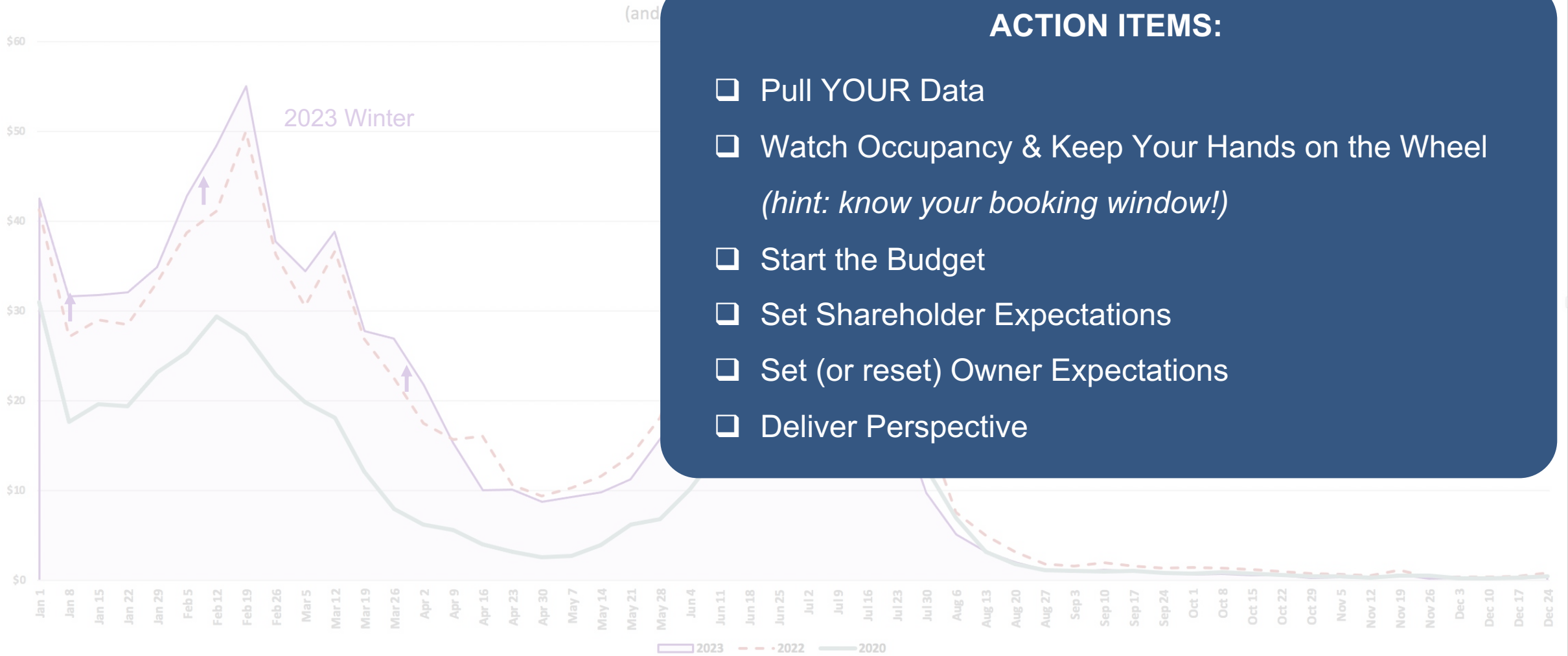


U.S. 2023 Adj. Paid Occupancy by Bedroom Size

as of 8/5/22



U.S. Adj RevPar - 2023 OUTLOOK



Thank You!

Jason Sprenkle, CEO

sales@keydatadashboard.com