



VACATION RENTAL SURVEY RESULTS – GLOBAL & BELGIUM REPORT – April 2021

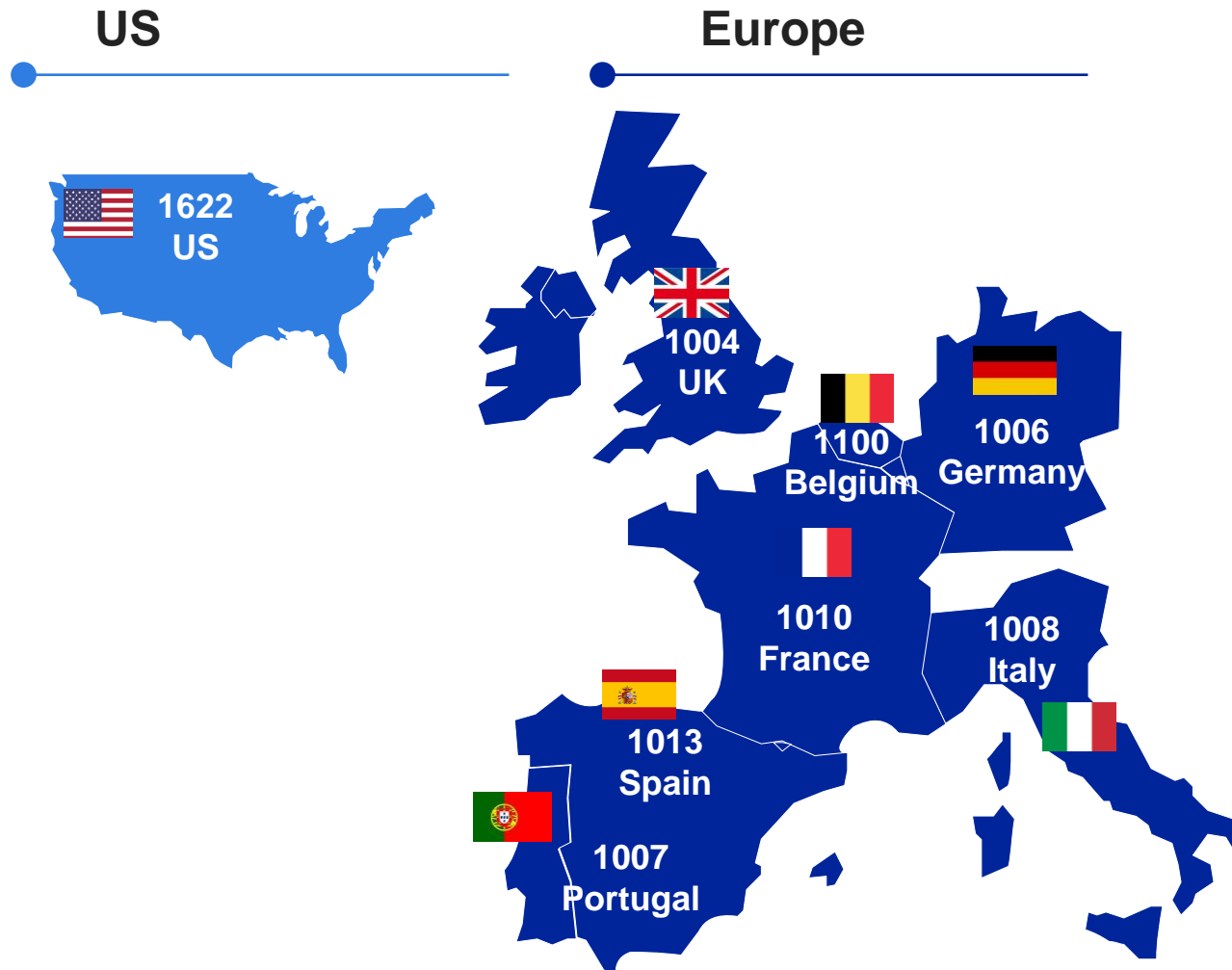
PUBLIC

INTERNAL

CONFIDENTIAL

STRICTLY CONFIDENTIAL

Survey scope & methodology



SAMPLE

- 8 countries
- Surveyed: 15513 respondents
- Analysis base: 8770 respondents planning to travel AND book a vacation rental in next 18 months

TIMELINE

- February 28th to April 1st, 2021

METHOD OF DATA COLLECTION

- Online survey - 15 questions

Desire to travel and interest in vacation rentals is strong despite the pandemic

INTENT TO TRAVEL IN THE NEXT 18 MONTHS

	GLOBAL	BELGIUM
YES	80%	80%
NO	20%	20%

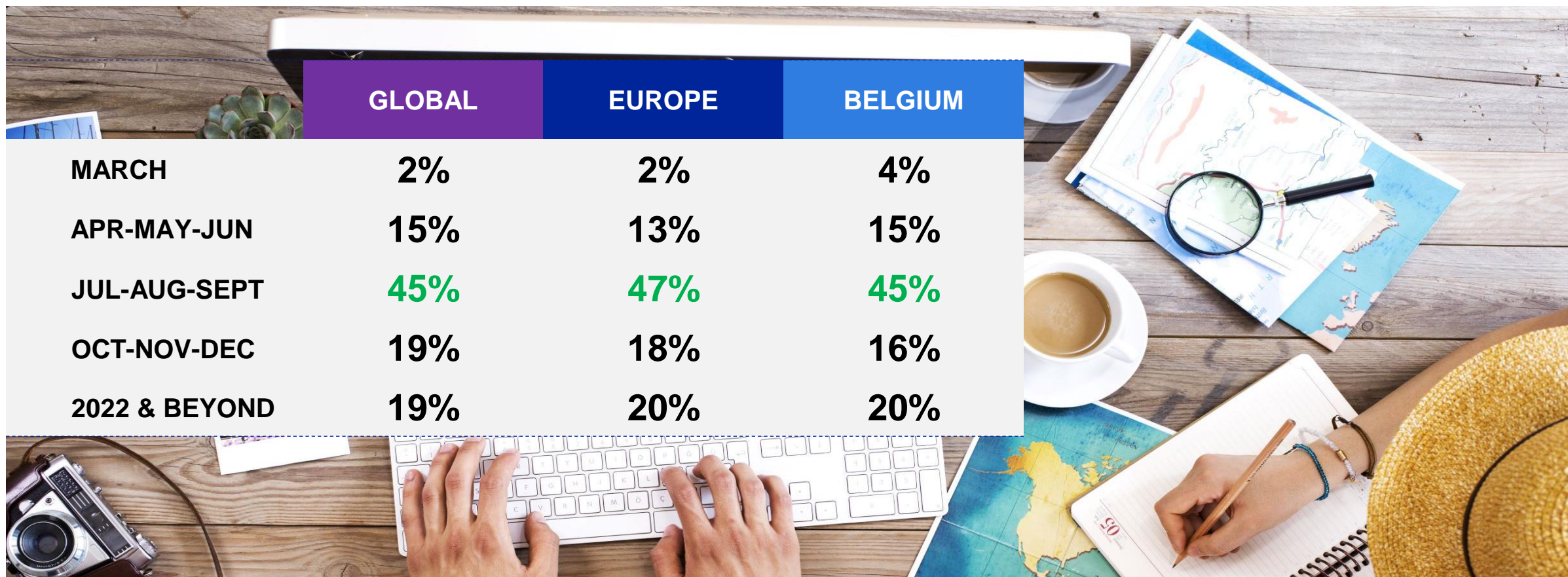
INTENT TO BOOK A VACATION RENTAL IN THE NEXT 18 MONTHS

	GLOBAL	BELGIUM
YES	78%	69%
NO	5%	10%

Question 1: Are you planning on traveling in the next 18 months?
Question 2: Are you planning on booking a vacation rental in the next 18 months?



While Summer 2021 is the top travel season globally...



	GLOBAL	EUROPE	BELGIUM
MARCH	2%	2%	4%
APR-MAY-JUN	15%	13%	15%
JUL-AUG-SEPT	45%	47%	45%
OCT-NOV-DEC	19%	18%	16%
2022 & BEYOND	19%	20%	20%

Question 1: When are you planning on traveling?

... the chosen destination is closer to home

**TRAVEL
DESTINATION –
WITHIN MY OWN
COUNTRY FOR 2021
SUMMER**

GLOBAL

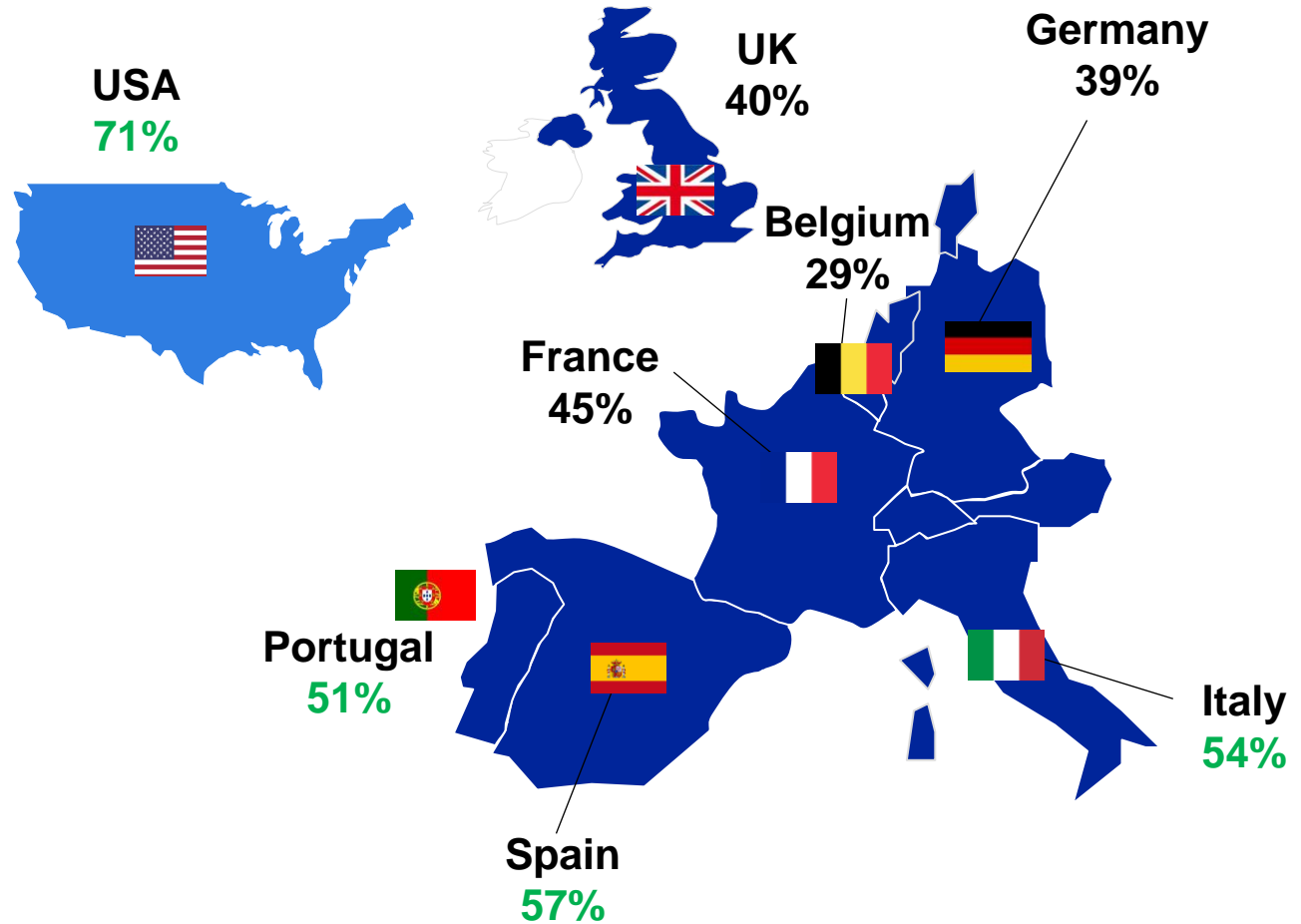
49%

EUROPE

46%

BELGIUM

29%



Question 1: In the next 18 months, are you planning on travelling within your own country or abroad?

Vacation rentals are largely booked for leisure but there is an interest in digital nomad/business use

REASONS TO BOOK A VACATION RENTAL (BELGIUM)

LEISURE TRAVEL	70%
EXTENDED STAY FOR WORK / DIGITAL NOMAD/FLEXCATION	14%
BUSINESS TRAVEL	14%

TOP 3 MOTIVATIONS TO STAY IN A VACATION RENTAL (BELGIUM)

COMFORT	#1
TRANQUILITY	#2
PRIVACY	#3



Question 1: Please select all reasons why you've booked a vacation rental

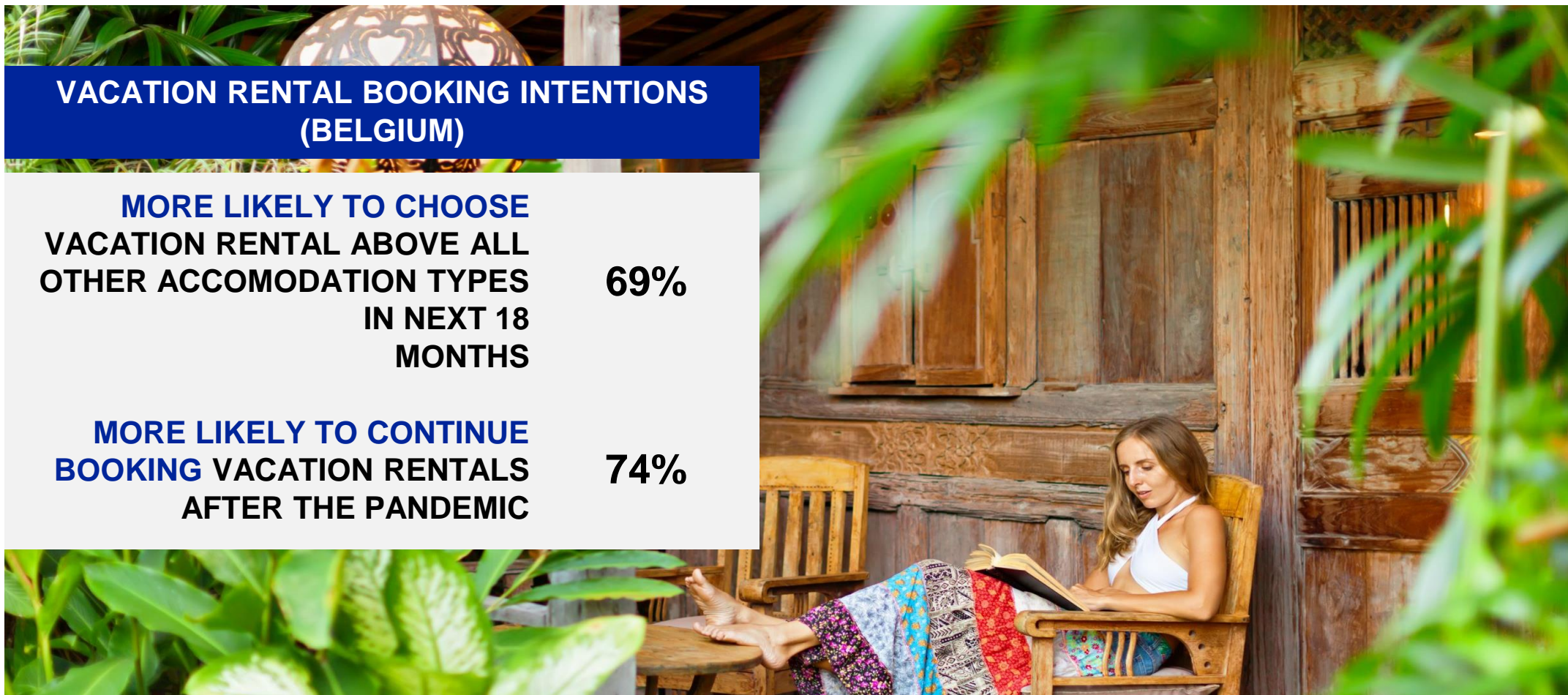
Question 2: Please select all reasons which motivate you to stay in a vacation rental

Vacation rentals are a preferred accommodation choice and this trend is here to stay after the pandemic

VACATION RENTAL BOOKING INTENTIONS (BELGIUM)

**MORE LIKELY TO CHOOSE
VACATION RENTAL ABOVE ALL
OTHER ACCOMODATION TYPES
IN NEXT 18
MONTHS** **69%**

**MORE LIKELY TO CONTINUE
BOOKING VACATION RENTALS
AFTER THE PANDEMIC** **74%**



Question 1: How likely are you to book a vacation rental above all other types of accommodations in the next 18 months?
Question 2: How likely are you to continue booking vacation rentals after the pandemic?

Intend to purchase travel insurance is increasing significantly

PAST - PURCHASED INSURANCE WHEN BOOKING A VACATION RENTAL

GLOBAL

42%

EUROPE

44%

BELGIUM

51%

NOW - MORE LIKELY TO PURCHASE TRIP PROTECTION/ TRAVEL INSURANCE FOR THEIR NEXT TRIP

GLOBAL

69%

EUROPE

70%

BELGIUM

64%



Question 1: Have you ever purchased travel insurance when booking a vacation rental?

Question 2: With the context of the pandemic, how likely are you to purchase trip protection/travel insurance for your next trip?

Top reassuring coverages highlight impact of the Covid pandemic



TOP 3 COVERAGES THAT REASSURE TRAVELERS INTENDING TO BOOK VACATION RENTALS

CANCELATION IN CASE OF COVID INFECTION OR CONFINEMENT		MEDICAL ASSISTANCE & REPATRIATION		REIMBURSEMENT OF UNUSED DAYS IN CASE OF INTERRUPTION OF STAY	
GLOBAL	43%	GLOBAL	22%	GLOBAL	20%
EUROPE	42%	EUROPE	23%	EUROPE	20%
BELGIUM	42%	BELGIUM	15%	BELGIUM	18%

Question: What type of insurance coverage would reassure you to use vacation rentals in the next 18 months?

Travelers will continue to favor socially distanced and safe locations when choosing destinations

TOP 3 MOST IMPACTING CRITERIA WHEN CHOOSING TRAVEL DESTINATION (BELGIUM)

HOW CROWDED THE LOCATION IS #1

LOCATION/DESTINATION THAT HAS CLEAR CLEANING PROTOCOLS #2

WHO I TRAVEL WITH *(individual, friends, family, family& others)* #3



Question: Please rank the following travel criteria from most important (5) to least important (1) due to COVID

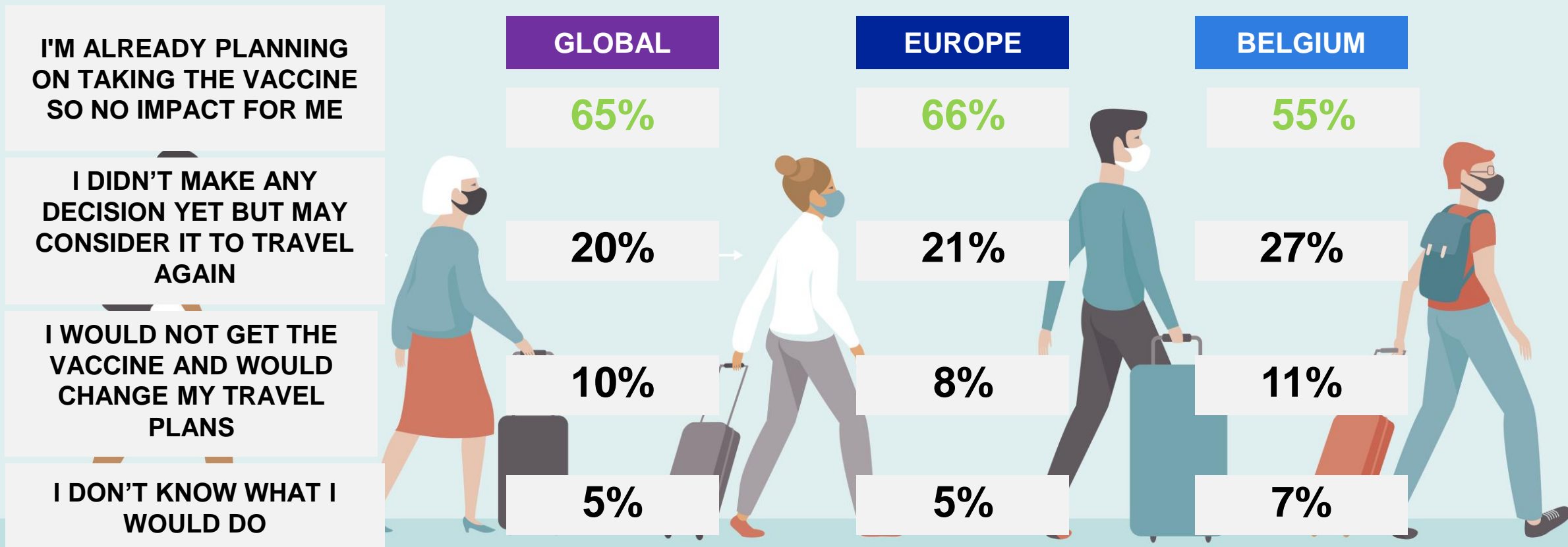
Vaccine and effective treatment availability are top factors for respondents in making a decision to travel

	GLOBAL & EUROPE	BELGIUM
AVAILABILITY OF A VACCINE	83%	69%
AVAILABILITY OF THERAPEUTICS / DRUGS AGAINST THE VIRUS	77%	61%
SLOWDOWN OF COVID-19 SPREAD WITHIN MY OWN COUNTRY	76%	61%



Question: On a scale of 1 (no impact) to 5 (extreme impact), how will each of the following impact your decision to take a trip during the next 18 months?

Travel is a strong motivator for taking the vaccine - majority of respondents are either planning already or willing to do it in order to travel



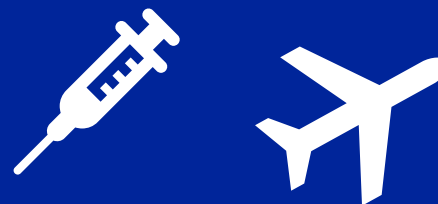
Question: What would you do if COVID vaccination becomes mandatory to take a flight?

Key takeaways

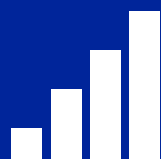
Consumers are excited to travel again,
even if first within own country



Travel is a good motivator to take
the vaccine



Vacation rentals are resilient and top of
mind among accomodation choices,
even beyond pandemic



Travel Insurance uptake is
expected to increase as health
risk awareness grows in the mind
of travelers





Thank you!



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