



The Future Of Travel

Exclusive Insights on European travel in 2020 & 2021



What we'll cover:

1. 2020 takeaways
2. Guest travel behavior in 2020
3. 2021 outlook
4. How guests are planning to travel in 2021
5. What guests expect from property managers
6. How property managers are securing their future

HomeToGo's "The Future Of Travel" report is a comprehensive analysis of travel behavior in Europe with a focus on **Spain** and **Germany** by HomeToGo in December 2020 and January 2021 with **additional insights provided by Transparent**. Our Guest / Property Manager Survey was conducted with 250 respondents. In this report, we look at guest intentions for travel in 2021, how property managers have responded to the pandemic, and combine that analysis with our internal data that contains invaluable user insights on top-line data points, such as average booking volume, length of stay, book-to-check-in, and more.

Our hope in offering this exclusive analysis that overlaps user behavior with consumer intentions and insights from property managers is to **help give our colleagues in the travel industry the best chance possible at bouncing back from the hit we all took in the pandemic**. We want this report to serve as a tool to help you have a successful business in 2021.

This white paper is dedicated to all those who have found themselves struggling to get by during the pandemic. **HomeToGo has shared in that pain but we believe that the analysis showcased in this white paper forecasts a brighter future for us all.**



HomeToGo is the world's fastest growing booking channel. In December 2020, we conducted a survey of guests and property managers to better understand what travel might look like in 2021. **We focused on consumer respondents in Germany and Spain to highlight two distinct travel markets.** Insights on additional markets can be made available upon request.

The headline that should have everyone excited about 2021 is that an **overwhelming majority of respondents indicated they plan to travel this year.** In the pages to come, we'll look closer at what to expect from these guests.

70%

of German consumer respondents and

63%

of Spanish consumer respondents plan to travel in 2021 regardless of any other consideration related to the pandemic.

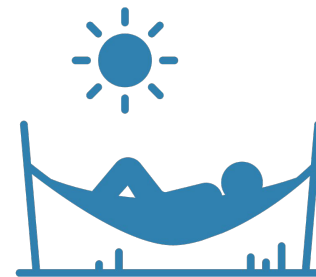
2020 Takeaways



**Europeans planned
with shorter notice**



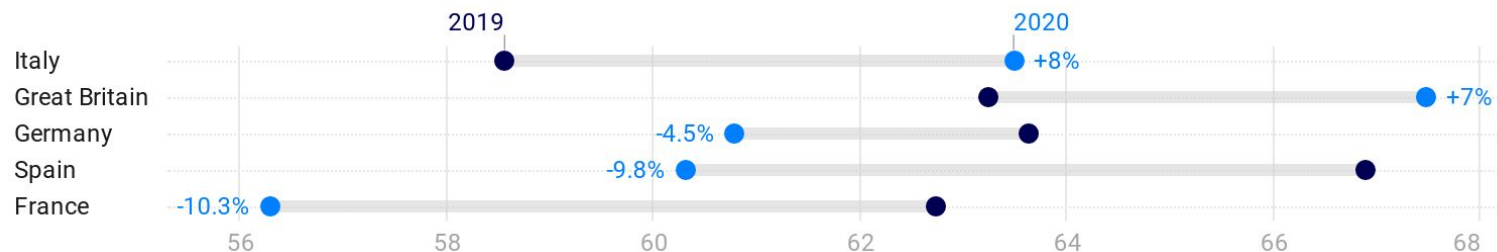
**Property managers earned
more on average per night
compared to the previous year**



**Europeans booked
longer stays**

On average, Europeans planned with shorter notice in 2020

Year on year change in booking lead time (days) across European countries



90%

of property managers say they've made their cancellation policies more flexible for guests and **52%** said they're **offering free cancellation** in 2021

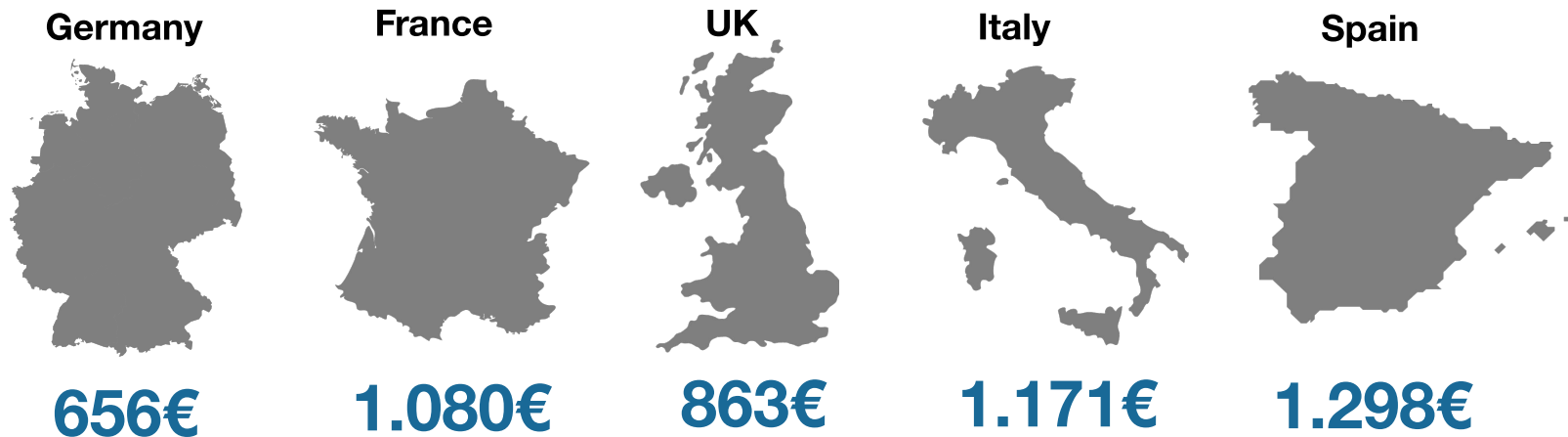


TIP

Offer free cancellations or remove minimum and maximum stays. **To make up for last-minute vacancies**, offer guests a special rate to make your property stand out

How much did guests spend on average last year

Here's a look at the average booking value in European in 2020

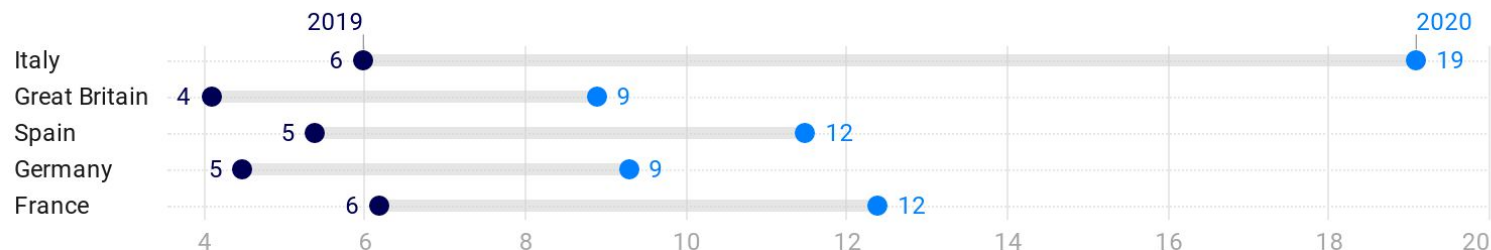


TIP

According to Transparent, Spain saw an **18%** increase in average **daily rate** from 2019 to 2020.

Europeans booked longer stays on average last year

Year on year change in length of stay (days) across European countries



43% of property managers say guests booked longer stays compared to previous years



190%

increase in length of stay among European guests in top five markets

2021 Outlook



Family and couple travel in rural, domestic destinations



Germans prefer spring and beach travel, Spaniards prefer winter and city travel



Expect more last-minute bookings among drive-to destinations

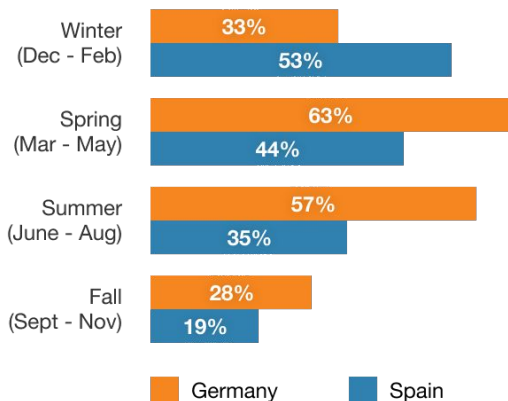


Guests currently projected to spend more on bookings than in previous year

Where and when are people heading for their first trip in 2021?

Germans favor spring and summer but Spaniards are eager to travel ASAP

Summer is the main season among German guests who are planning a trip in the next 12 months whereas Spaniards are eager to travel this winter



63%

of German guests prefer to stay near a beach



64%

of Spanish guests prefer to visit cities

Europeans are currently planning far in advance



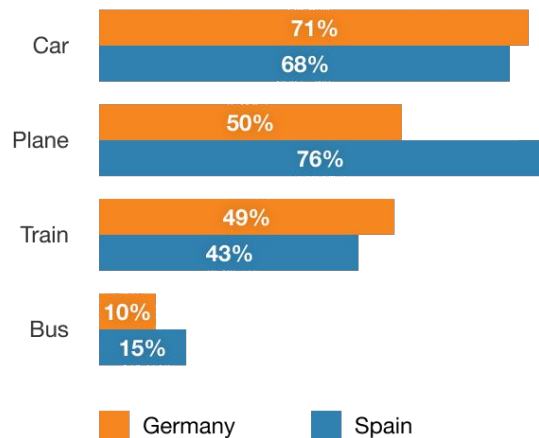
154 days

is the average lead time we see among **domestic guests** in January 2021. The trajectory currently follows year-over-year trends but **we expect lead time to continue decreasing in the coming months.**

Drive-to destinations and last-minute trips are still popular

Guests are hitting the road in 2021 — literally.

Means of transportation which guests plan to use in 2021



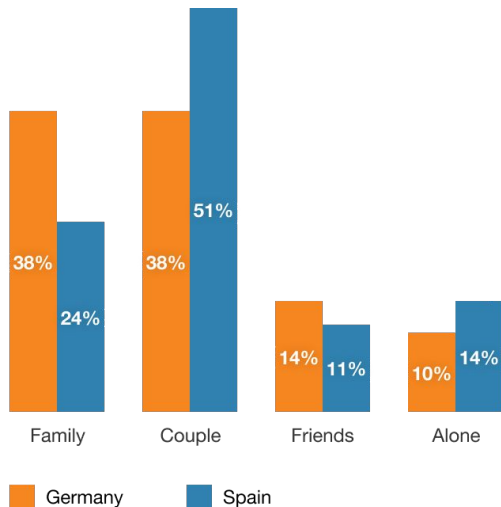
81% of property managers noticed more last-minute bookings in 2020



Who will guests hit the road with in 2021?

And how much are guests currently spending on bookings in 2021?

Spanish guests overwhelmingly prefer travelling with their partner. Germans are split between family and couple travel.



1.249€

Average booking value for bookings in Europe with a **check-in date in 2021** as of January 2021. That's a **20% increase** from 2020 so far.



TIP

Although we generally see a **higher average booking value for 2021**, we do expect to see the value change as more **last-minute bookings for short trips** come in and the year progresses.

What destination types are the most popular so far?

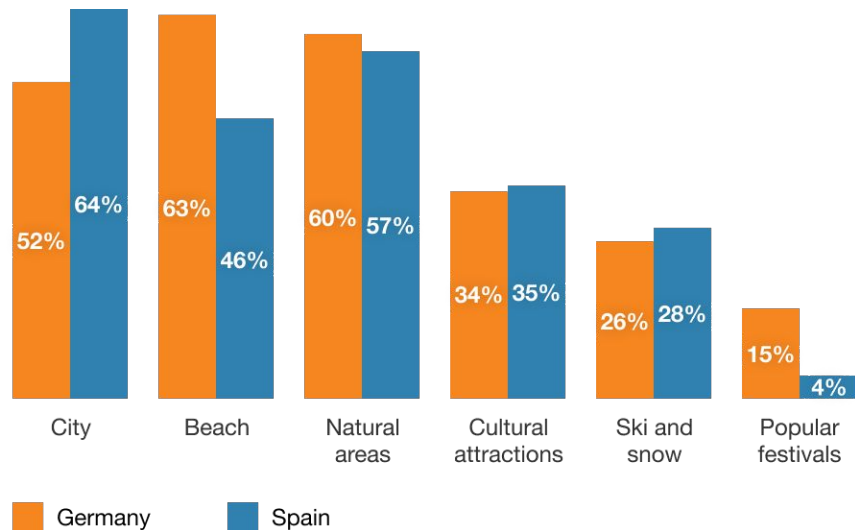
Guests are embracing their wild side. Rural destinations and natural areas are proving most popular.



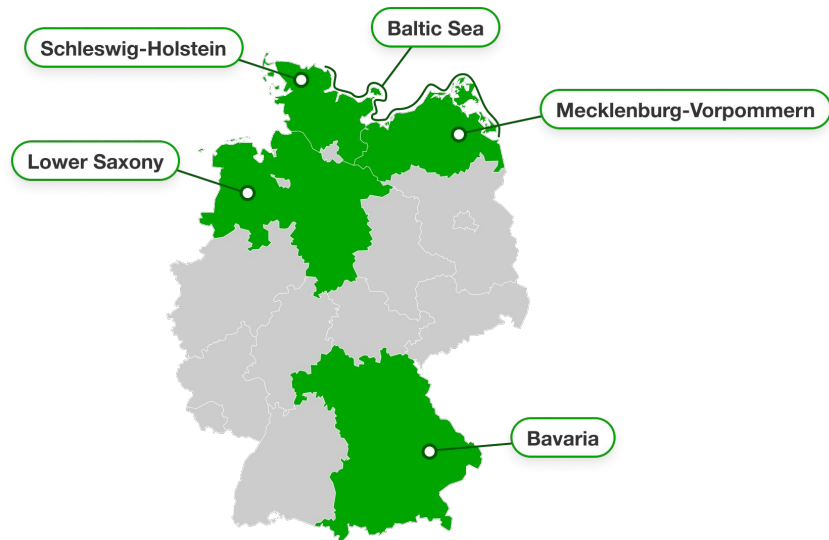
9 in 10

of European guests prefer
rural destinations

The most popular types of attractions guests are planning to visit in the next 12 months



The most popular destinations in 2021 so far



Cleanliness is still a major decision factor for guests



56%

of Spanish guests included enhanced cleaning in their top-three decision-making factors when making a booking (22% said it was most important)



91%

of property managers are highlighting COVID-related cleaning measures



TIP

81% of property manager **are not reflecting extra COVID-related cleaning fees** in the final price. We recommend both listing extra cleaning measures and reflecting it in your price.

How are property managers securing their future?

Property Managers are realizing the importance of revenue diversity and targeting the right guest personas



52%

of property managers have diversified revenue channels



91%

of property managers are interested in listing on another OTA



57%

are noticing more bookings from guests wanting to work remotely



38%

are noticing more bookings from family guests

How can property managers target remote workers?



24%

of Spanish guests plan to work remotely while traveling



TIP

Promote a mixture of features that make your property **comfortable for a long-term stay** as well as anything unique that makes your listing **stick out among your competition.**



High-speed, stable internet



Access to essentials like grocery stores and take away food



Comfortable work space



Pets allowed

What property managers are looking forward to in 2021

“ A return to normalcy.

“ We look forward to bookings booming again.

“ We believe the pandemic will get better, therefore, we expect to achieve similar results as in previous years.

“ Hopefully, as these restrictions end, everyone will want to travel again and have holidays more than before.



HomeToGo is the fastest-growing vacation rental distribution channel in the world. [Join now](#) to expand your reach to millions of new customers. Fast payout, direct guest communication and smooth integration – that's how HomeToGo helps property managers maximize bookings and diversify their revenue streams.



Transparent tracks 35 million Airbnb, Vrbo, Booking.com & TripAdvisor listings to **empower property managers with market insights** to optimize rate, occupancy & growth. Learn about our [free](#) and [PRO](#) data dashboards - users report up to 25% growth in revenue as well as hours saved.



Contact us

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Full Spanish Report (en español):

hometogo.es/espana/#comportamiento-turismo-2021

Full Germany Report (auf Deutsch):

hometogo.de/media/reisetrends

Want to list your properties on HomeToGo or have questions about a potential partnership?
Reach out to channel.manager@hometogo.com.