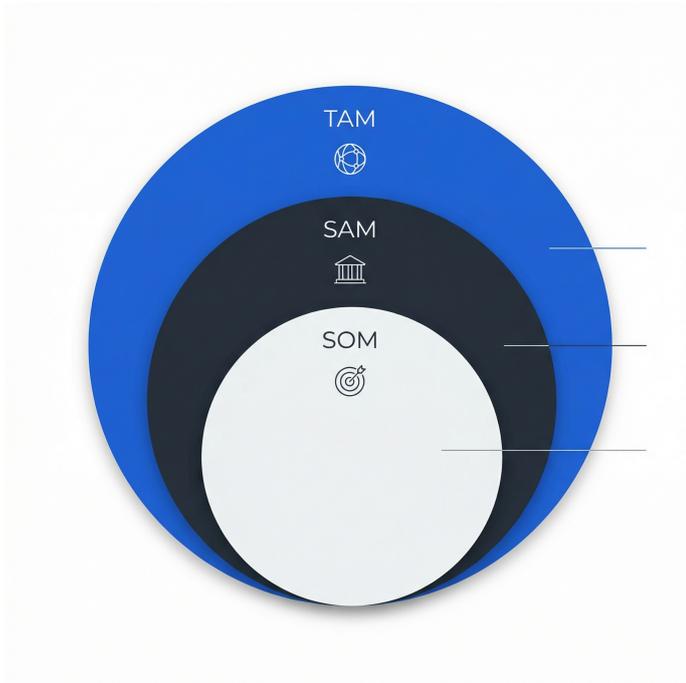


MARKET RESEARCH & ANALYSIS

Market Research

Market Potential



TAM

\$2.94 billion (luxury travel market)

Luxury Travel Market Size, Share & Growth (Fortune Business Insights) (2026)

SAM

\$500-600 million (curated unique stays segment)

Luxury Travel Market Size, Share & Growth (Fortune Business Insights) (2026), Why Unique Vacation Rentals Are a Smart Investment (AirDNA) (2024)

SOM

\$50-75 million (initial addressable market)

Luxury Travel Market Size, Share & Growth (Fortune Business Insights) (2026), 2023 Travel Trends: U.S. Travelers Aim to Experience Destinations (GetYourGuide) (2023), Why Unique Vacation Rentals Are a Smart Investment (AirDNA) (2024)

Growth Rate (CAGR)

8.68%

Luxury Travel Market Size, Share & Growth (Fortune Business Insights) (2026)

Demand Drivers

- 90% of travelers prioritize authentic local experiences
- 45% of travelers express concern their experiences lack authenticity
- Premium pricing acceptance for authentic unique stays
- Growth in sustainable and ethical tourism concerns
- Increased regulation of conventional STR platforms

Market Trends

Macro Trends

Rising demand for authentic travel experiences very high

Growing traveler concerns about experience authenticity high

Sustainability becoming market requirement high

Regulatory tightening on peer-to-peer accommodations medium

Shift toward verifiable sustainability claims high

Micro Trends

AI-powered personalized travel experiences high

Enhanced identity verification for traveler safety very high

Dynamic pricing for unique accommodation properties high

Short-term rental insurance innovations medium

Niche travel market segmentation high

Competitive Analysis

Provider/Product	USP	Pricing	Age
Airbnb	Largest selection with 7.7M listings, brand recognition	Split fee (3% host fee, 14.1-16.5% guest fee)	established (>5y)
Vrbo	Exclusive whole homes, superior filtering capabilities	5% commission + 3% processing fee	established (>5y)
Fairbnb.coop	50% fees reinvested in local communities, anti-overtourism	7-12% commission	new (<2y)
SLH	Over 650 boutique hotels worldwide, curated collection	B2B commission model	established (>5y)
TrustedHousesitters	Free stays in exchange for pet sitting	Subscription fee (\$149/year)	established (>5y)

White Space Gap Analysis

- Trusted verification system addressing traveler safety concerns

Score: high

- Transparent pricing without hidden fees causing traveler frustration

Score: high

- Ethical monetization model avoiding overtourism concerns

Score: medium

- Authentic local experiences with verified community connections

Score: high

- Balanced fee structure rewarding hosts with higher retention rates

Score: high

Pain/Gain Analysis

Customer Jobs

- Discover authentic local experiences that reflect destination culture
- Book trustworthy accommodations with verified hosts
- Monetize unused spaces with minimal risk
- Ensure safety and security during travel stays
- Avoid generic, chain-like accommodations

Customer Pains

- 45% of travelers concerned about experience authenticity
- High guest fees (14-16.5%) and unclear pricing on platforms
- Hosts face 15%+ fees reducing revenue potential
- Verification concerns for both hosts and guests
- Trust issues with fake reviews and ratings manipulation

Customer Gains

- Travelers spend 3 hours daily on authentic experiences
- 95% of travelers prefer new and unique experiences
- Furnished rentals increase revenue by 35-40%
- LTV:CAC ratio of 3:1 improves marketplace sustainability
- Direct booking rates increase 30% with strong trust signals

Product Hypotheses

Hypothesis 1

Idea:

Curated unique stays marketplace with balanced fees

Key Benefit:

Addresses traveler demand for authenticity while providing hosts better economics

Critical Assumption:

Will travelers pay premium for authentic verified stays; will hosts join with lower fees

Hypothesis 2

Idea:

Enhanced verification layer with trusted identity checks

Key Benefit:

Reduces booking abandonment due to trust concerns

Critical Assumption:

Verification adds conversion value outweighing potential friction

Hypothesis 3

Idea:

Transparent pricing model without hidden fees

Key Benefit:

Builds trust and reduces booking friction

Critical Assumption:

Transparent pricing creates competitive advantage versus opaque models

Hypothesis 4

Idea:

Bilateral review system with verified experience tags

Key Benefit:

Creates more trustworthy community than current platforms

Critical Assumption:

Verified reviews improve booking conversion rates by 25%

Hypothesis 5

Idea:

Community reinvestment model with ethical positioning

Key Benefit:

Attracts ethically conscious travelers growing market segment

Critical Assumption:

Ethical positioning increases customer LTV by 20%

Next Steps

Research Questions

- How much premium will travelers pay for authentic verified stays versus standard listings? (Idea 1)
- What fee structure do hosts consider fair while maintaining platform sustainability? (Idea 1)
- Which verification methods maximize trust while minimizing booking friction? (Idea 2)
- How much does pricing transparency impact booking conversion rates? (Idea 3)
- How do verified experience tags improve review credibility and trust? (Idea 4)

Interview Types

- Exploratory
- Problem Validation

- Solution Validation

Data & Insight Gaps

- Actual conversion uplift from identity verification
- Direct booking rate impact of community reinvestment model
- Quantitative measurement of trust metrics impact on repeat bookings