

# Luxury Vacation Rental Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

<https://marketpublishers.com/r/L95171FE70FAEN.html>

Date: July 2025

Pages: 170

Price: US\$ 4,850.00 (Single User License)

ID: L95171FE70FAEN

## Abstracts

The Global Luxury Vacation Rental Market was valued at USD 26.5 billion in 2024 and is estimated to grow at a CAGR of 9.3% to reach USD 63.7 billion by 2034. This represents a compound annual growth rate of 9.3% during the forecast period. The segment has emerged as a key part of the premium travel experience, where affluent travelers are seeking far more than just upscale accommodation. Demand is shifting toward end-to-end curated journeys that provide comfort, convenience, and exclusivity.

Luxury rentals have evolved into high-value assets for brands appealing to modern travelers who prioritize privacy, customization, and elevated service standards. The focus is no longer on square footage and views alone, but on delivering experiences tailored to individual preferences. Features such as wellness amenities, private chefs, and smart tech-enabled concierge services are becoming expectations rather than luxuries.

In the wake of the pandemic, safety and personal space have become essential factors influencing choice. As high-net-worth travelers return to international travel, bookings for standalone estates, chalets, and secluded villas are surging. Simultaneously, a strong emphasis on hygiene, digital personalization, and smart property technologies continues to shape the evolution of premium vacation rental offerings around the world.

The luxury villas and private estate segment held 49% share and is projected to grow at a CAGR of 10% through 2034. These expansive properties appeal to affluent families, remote professionals, and multigenerational groups due to their ability to combine personal privacy with high-end amenities. Customized guest experiences—ranging from private spas and wellness services to in-home dining and concierge planning—make

these rentals ideal for travelers seeking full control over their stay. Their larger footprints and secluded settings meet increasing demand for both space and exclusivity. Wealthy travelers continue to gravitate toward luxury homes that offer flexibility, lifestyle alignment, and upscale aesthetics, especially in sought-after global locations. These rentals are also attractive to investors, as they consistently generate high returns in regions with strong tourism infrastructure and consistent demand.

Online travel agencies segment held 45% share and is expected to grow at a CAGR of 10% between 2025 and 2034. OTAs are transforming the booking experience with their global accessibility, user-friendly platforms, and increasing use of intelligent features. Through advanced search filters, AI-powered recommendations, and real-time availability, they simplify the decision-making process for high-income travelers. These digital platforms continue to lead in luxury bookings by pairing curated listings with tech-enhanced customer journeys, combining service excellence with seamless usability. Their ability to showcase high-value properties and deliver efficient, contactless reservations is proving crucial for market growth. As global travel rebounds, OTAs are also offering flexible booking policies and loyalty integrations to meet traveler expectations and increase repeat usage across regions.

United States Luxury Vacation Rental Market held 82% share and generated USD 9.6 billion in 2024. The country's strong economic fundamentals, transparent legal framework, and broad portfolio of high-end destinations—ranging from coastal resorts to urban escapes—contribute to its leadership in this space. Institutional investors and property owners favor the U.S. for its predictable real estate regulations and streamlined transaction processes, which offer greater confidence and stability. Both international and domestic travelers view the U.S. as a reliable market for luxury rentals, thanks to its established infrastructure, diverse experiences, and continuous innovation in hospitality. Furthermore, rising interest in flexible travel, work-from-anywhere setups, and exclusive staycations is helping to reinforce the U.S. as a hub for premium vacation rental demand.

Major companies actively shaping the luxury vacation rental industry include Onefinestay, VRBO, Rental Escapes, Le Collectionist, Luxury Retreats, Plum Guide, and Airbnb Luxe. Each brand plays a significant role in enhancing consumer trust and expanding access to refined, personalized travel accommodations. To secure stronger market positions, leading players in the luxury vacation rental industry are deploying highly targeted strategies. These include building robust proprietary booking platforms that offer seamless digital experiences and personalized guest interactions.

Many are also expanding their global portfolios by acquiring or partnering with premium local property managers to ensure quality standards and regional authenticity. Other companies are investing in high-touch concierge services, integrated smart technologies, and loyalty programs tailored to affluent clientele.

### **Comprehensive Market Analysis and Forecast**

Industry trends, key growth drivers, challenges, future opportunities, and regulatory landscape

Competitive landscape with Porter's Five Forces and PESTEL analysis

Market size, segmentation, and regional forecasts

In-depth company profiles, business strategies, financial insights, and SWOT analysis

## Contents

### **CHAPTER 1 METHODOLOGY**

- 1.1 Market scope and definition
- 1.2 Research design
  - 1.2.1 Research approach
  - 1.2.2 Data collection methods
- 1.3 Data mining sources
  - 1.3.1 Global
  - 1.3.2 Regional/Country
- 1.4 Base estimates and calculations
  - 1.4.1 Base year calculation
  - 1.4.2 Key trends for market estimation
- 1.5 Primary research and validation
  - 1.5.1 Primary sources
- 1.6 Forecast model
- 1.7 Research assumptions and limitations

### **CHAPTER 2 EXECUTIVE SUMMARY**

- 2.1 Industry 360° synopsis, 2021 – 2034
- 2.2 Key market trends
  - 2.2.1 Regional
  - 2.2.2 Property
  - 2.2.3 Booking Channel
  - 2.2.4 Guest
  - 2.2.5 Service Level
- 2.3 TAM Analysis, 2025-2034
- 2.4 CXO perspectives: Strategic imperatives
  - 2.4.1 Executive decision points
  - 2.4.2 Critical success factors
- 2.5 Future outlook and strategic recommendations

### **CHAPTER 3 INDUSTRY INSIGHTS**

- 3.1 Industry ecosystem analysis
  - 3.1.1 Supplier landscape
  - 3.1.2 Profit margin analysis

- 3.1.3 Cost structure
- 3.1.4 Value addition at each stage
- 3.1.5 Factor affecting the value chain
- 3.1.6 Disruptions
- 3.2 Industry impact forces
  - 3.2.1.1 Growth drivers
    - 3.2.1.1.1 Growing demand for privacy, space, and personalization
    - 3.2.1.1.2 Increased popularity of experiential and immersive travel
    - 3.2.1.1.3 Digital booking transformation and platform expansion
    - 3.2.1.1.4 Remote work and extended stays
    - 3.2.1.1.5 Growing influence of special occasion and multi-generational travel
  - 3.2.2 Industry pitfalls and challenges
    - 3.2.2.1 High operating and maintenance costs
    - 3.2.2.2 Intense competition and commission wars
  - 3.2.3 Market opportunities
    - 3.2.3.1 MIntegration of AI for personalized guest experiences
    - 3.2.3.2 Expansion into emerging luxury destinations
    - 3.2.3.3 Partnerships with experienced providers and local hosts
    - 3.2.3.4 Sustainability-focused property features
- 3.3 Growth potential analysis
- 3.4 Regulatory landscape
  - 3.4.1 North America
  - 3.4.2 Europe
  - 3.4.3 Asia Pacific
  - 3.4.4 Latin America
  - 3.4.5 Middle East & Africa
- 3.5 Porter's analysis
- 3.6 PESTEL analysis
- 3.7 Technology and innovation landscape
  - 3.7.1.1 Proptech solutions in luxury rentals
  - 3.7.1.2 Property management software
  - 3.7.1.3 Channel management systems
  - 3.7.1.4 Revenue management tools
  - 3.7.1.5 Guest communication platforms
  - 3.7.2 Emerging technologies
    - 3.7.2.1 Artificial intelligence and machine Learning
    - 3.7.2.2 Internet of things (IoT) integration
    - 3.7.2.3 Virtual and augmented reality
    - 3.7.2.4 Blockchain applications

- 3.7.2.5 Biometric security systems
- 3.8 Tourist statistics and spending, 2021 -2024
  - 3.8.1 North America
  - 3.8.2 Europe
  - 3.8.3 Asia Pacific
  - 3.8.4 Latin America
  - 3.8.5 MEA
- 3.9 Value chain analysis
  - 3.9.1 Property owners and investors
  - 3.9.2 Property management companies
  - 3.9.3 Technology platform providers
  - 3.9.4 Booking channels and distribution
  - 3.9.5 Ancillary service providers
  - 3.9.6 End consumers
- 3.10 Investment and financial analysis
  - 3.10.1 Investment landscape overview
  - 3.10.2 Investment patterns and funding sources
  - 3.10.3 M&A activity and market consolidation
  - 3.10.4 Financial performance metrics
- 3.11 Patent analysis
- 3.12 Sustainability and environmental aspects
  - 3.12.1 Sustainable practices
  - 3.12.2 Waste reduction strategies
  - 3.12.3 Energy efficiency in production
  - 3.12.4 Eco-friendly Initiatives
  - 3.12.5 Carbon footprint considerations

## **CHAPTER 4 COMPETITIVE LANDSCAPE, 2024**

- 4.1 Introduction
- 4.2 Company market share analysis
  - 4.2.1 North America
  - 4.2.2 Europe
  - 4.2.3 Asia Pacific
  - 4.2.4 LATAM
  - 4.2.5 MEA
- 4.3 Competitive analysis of major market players
- 4.4 Competitive positioning matrix
- 4.5 Strategic outlook matrix

#### 4.6 Key developments

- 4.6.1 Mergers & acquisitions
- 4.6.2 Partnerships & collaborations
- 4.6.3 New Product Launches
- 4.6.4 Expansion Plans and funding

### **CHAPTER 5 MARKET ESTIMATES & FORECAST, BY PROPERTY, 2021 - 2034 (\$MN)**

- 5.1 Key trends
- 5.2 Luxury villas and estates
- 5.3 Luxury penthouses and apartments
- 5.4 Unique and experiential properties
- 5.5 Luxury resort residences

### **CHAPTER 6 MARKET ESTIMATES & FORECAST, BY BOOKING CHANNEL, 2021 - 2034 (\$MN)**

- 6.1 Key trends
- 6.2 Online travel agencies (OTAs)
- 6.3 Luxury-focused platforms
- 6.4 Direct booking channels
- 6.5 Concierge and travel agent booking

### **CHAPTER 7 MARKET ESTIMATES & FORECAST, BY GUEST, 2021 - 2034 (\$MN)**

- 7.1 Key trends
- 7.2 Ultra-high-net-worth (UHNW) travelers
- 7.3 Affluent leisure travelers
- 7.4 Corporate and business travelers
- 7.5 Millennial and gen z luxury travelers
- 7.6 Multi-generational family groups
- 7.7 Special occasion travelers

### **CHAPTER 8 MARKET ESTIMATES & FORECAST, BY SERVICE LEVEL, 2021 - 2034 (\$MN)**

- 8.1 Key trends
- 8.2 Full-service luxury rentals

- 8.3 Self-service premium properties
- 8.4 Hybrid service models
- 8.5 Concierge-enhanced rentals

## **CHAPTER 9 MARKET ESTIMATES & FORECAST, BY REGION, 2021 - 2034 (\$MN)**

- 9.1 Key trends
- 9.2 North America
  - 9.2.1 US
  - 9.2.2 Canada
- 9.3 Europe
  - 9.3.1 Germany
  - 9.3.2 UK
  - 9.3.3 France
  - 9.3.4 Italy
  - 9.3.5 Spain
  - 9.3.6 Nordics
  - 9.3.7 Russia
  - 9.3.8 Portugal
  - 9.3.9 Croatia
- 9.4 Asia Pacific
  - 9.4.1 China
  - 9.4.2 India
  - 9.4.3 Japan
  - 9.4.4 Australia
  - 9.4.5 South Korea
  - 9.4.6 Singapore
  - 9.4.7 Thailand
  - 9.4.8 Indonesia
- 9.5 Latin America
  - 9.5.1 Brazil
  - 9.5.2 Mexico
  - 9.5.3 Argentina
- 9.6 MEA
  - 9.6.1 South Africa
  - 9.6.2 Saudi Arabia
  - 9.6.3 UAE

## **CHAPTER 10 COMPANY PROFILES**

- 10.1 Global companies
  - 10.1.1 Airbnb Luxe
  - 10.1.2 Booking Holdings
  - 10.1.3 Expedia Group (VRBO Premier)
  - 10.1.4 Homes & Villas (Marriott International)
  - 10.1.5 TripAdvisor
- 10.2 Full-service property management companies
  - 10.2.1 AvantStay
  - 10.2.2 Edge Retreats
  - 10.2.3 Elite Havens
  - 10.2.4 Le Collectionist
  - 10.2.5 Natural Retreats
  - 10.2.6 Sonder Holdings
  - 10.2.7 Vacasa
- 10.3 Luxury specialists
  - 10.3.1 LUXJB
  - 10.3.2 Luxury Villa
  - 10.3.3 Onefinestay (Accor Group)
  - 10.3.4 Plum Guide
  - 10.3.5 RedAwning
  - 10.3.6 Villa Plus
- 10.4 Regional specialist
  - 10.4.1 Luxury Retreat (Airbnb)
  - 10.4.2 Oliver's Travels
  - 10.4.3 Onefinestay
  - 10.4.4 Villas of Distinction
- 10.5 Emerging and innovative companies
  - 10.5.1 Blueground
  - 10.5.2 Rental Escapes
  - 10.5.3 Selina Hospitality
  - 10.5.4 Zeus Living

## I would like to order

Product name: Luxury Vacation Rental Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

Product link: <https://marketpublishers.com/r/L95171FE70FAEN.html>

Price: US\$ 4,850.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/L95171FE70FAEN.html>