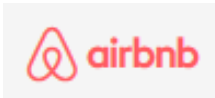


Renting out in the sharing economy: Assessing the meaning of ‘shared accommodation’ for city tourism

International Seminar on Consumer Trends and Tourism
Vienna, September 9th, 2016

Dirk Schmücker

- Booking site without payment handling (procurement site)
- Short-term accommodation
- Local hosts (usually)
- Private („shared“) offers and commercial offers
- Hosted (host being present) or non-hosted (host not being present) accommodation



VRBO®
Part of the HomeAway Family



A banner for Airbnb's 'LIVE THERE' campaign. It features a close-up of a man and a woman smiling at each other. The man is on the left, looking towards the woman on the right. The background is slightly blurred, showing what appears to be a red curtain or wall.

LIVE THERE

Book homes from local hosts in 191+ countries and experience a place like you live there.

[Learn About Airbnb](#)

A banner for Airbnb's 'Stay with Locals and Meet Travelers' campaign. It features a group of five people (three women and two men) smiling and posing together. The man on the right has his arm raised in a celebratory gesture. The background is a bright, outdoor setting with a clear sky.

Stay with Locals and Meet Travelers

Share Authentic Travel Experiences

[f Join with Facebook](#)

[Join with Email](#)





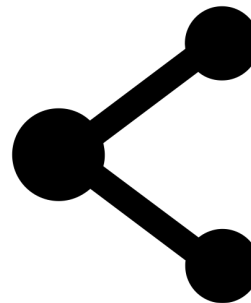




Disturbance of
neighbourhoods, loss of
identity, „touristification“

Spatial competition
(availability and prices of real
estate)

(Unfair) Competition
for the hotel industry



Additional income

Social enrichment (meet
interesting people)

Redistribution of tourism in
the city

WIMDU APARTMENTS FOR BUSINESS TRAVELLERS



Reduce your travel costs!

Relaxing business trips. cheaper than hotels. In Wimdu city apartments.



E.g.
Wifi
24h check-in

Amtliche Abkürzung: ZwVbG
Ausfertigungsdatum: 29.11.2013
Gültig ab: 12.12.2013
Dokumenttyp: Gesetz

Quelle:



Fundstelle: GVBl. 2013, 626
Gliederungs-Nr: 238-3

**Gesetz
über das Verbot der Zweckentfremdung von Wohnraum
(Zweckentfremdungsverbot-Gesetz - ZwVbG)
Vom 29. November 2013**

Zum 08.09.2016 aktuellste verfügbare Fassung der Gesamtausgabe

Nichtamtliches Inhaltsverzeichnis

Titel	Gültig ab
<u>Gesetz über das Verbot der Zweckentfremdung von Wohnraum (Zweckentfremdungsverbot-Gesetz - ZwVbG) vom 29. November 2013</u>	<u>12.12.2013</u>
<u>Eingangsformel</u>	<u>12.12.2013</u>
<u>§ 1 - Anwendungsbereich</u>	<u>12.12.2013</u>
<u>§ 2 - Zweckentfremdung</u>	<u>06.04.2016</u>
<u>§ 3 - Genehmigung</u>	<u>06.04.2016</u>
<u>§ 4 - Rückführung von Wohnraum</u>	<u>12.12.2013</u>

Regulation

Exists e.g. in

Local taxes

Lisbon, Barcelona, Vienna, Amsterdam

Max length of renting

Munich (six weeks), Amsterdam (60 days), San Francisco (90 days), San José (180 days)

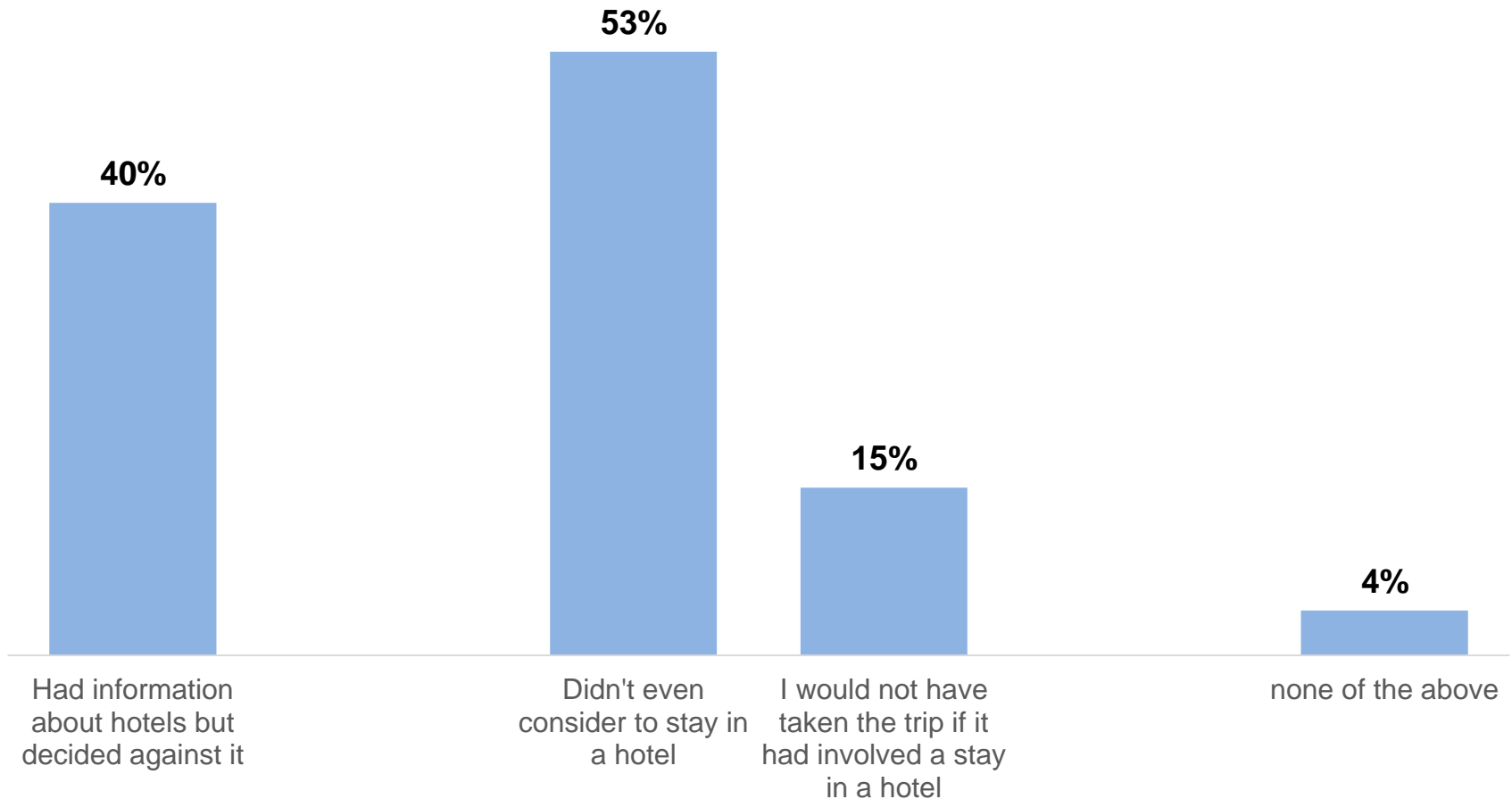
Prohibition of short-term renting and/or licensing/permission required

Berlin, Lisbon, Barcelona, Chicago (specific zones), Kansas City

Listing data

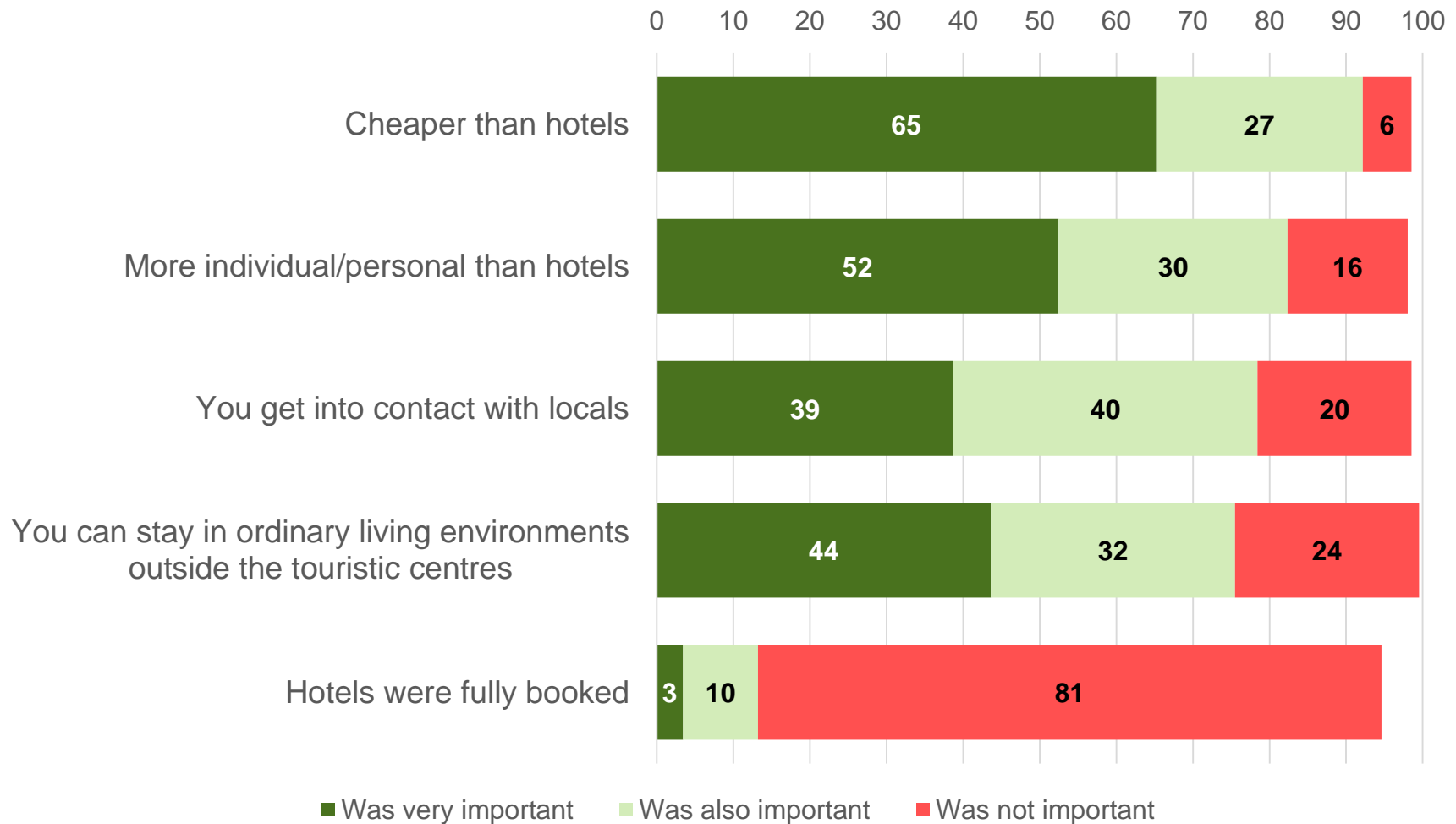
Survey data

Are hosting platforms increasing the pie?

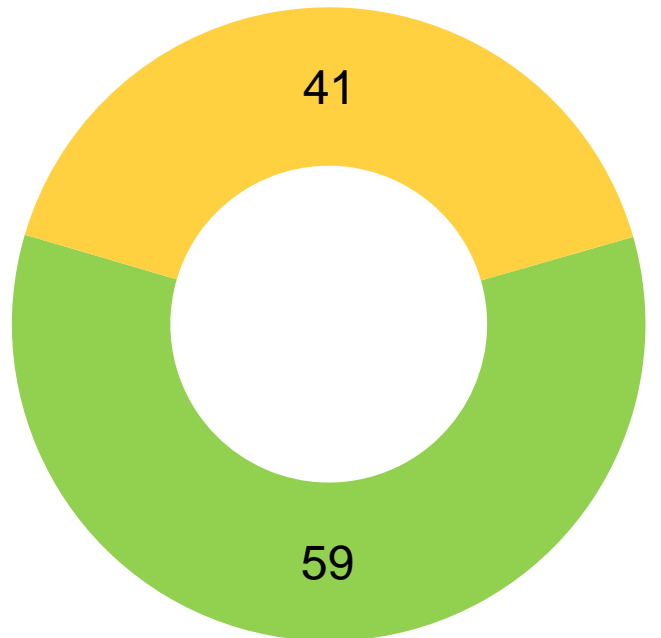


Q9: Thinking about your trip to [...]: Which of these statements apply to you? (multiple responses)
n=204, DGT Survey 2016, Convenience Sample (German Facebook users), May 2016

Is it the price or the social experience?



Q9: Why did you choose a privately rented accommodation? How important were the following aspects? (multiple responses), in per-cent
n=204, DGT Survey 2016, Convenience Sample (German Facebook users), May 2016

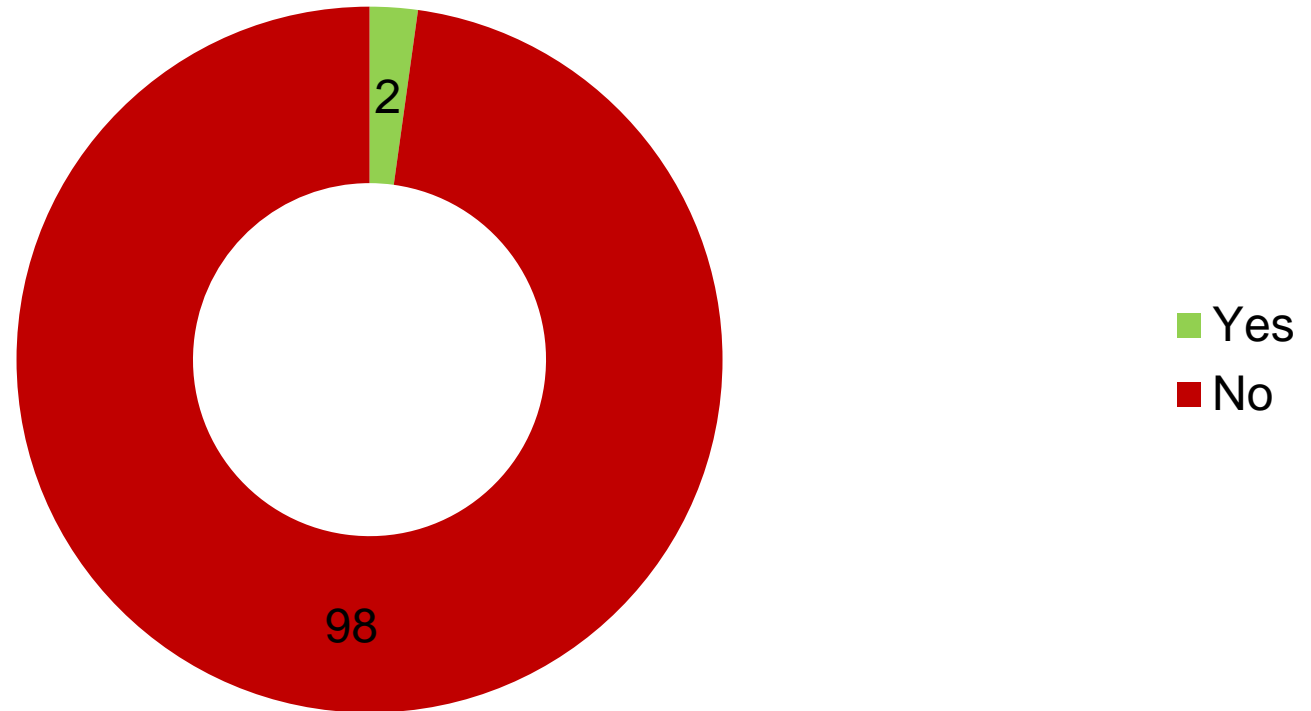


■ Social (+price) ■ Price (only)

„very important“	„Social“ Cluster	„Price“ Cluster
cheaper	50	87
contact	60	8
living environment	71	5
individual/personal	80	13
hotels full	3	5

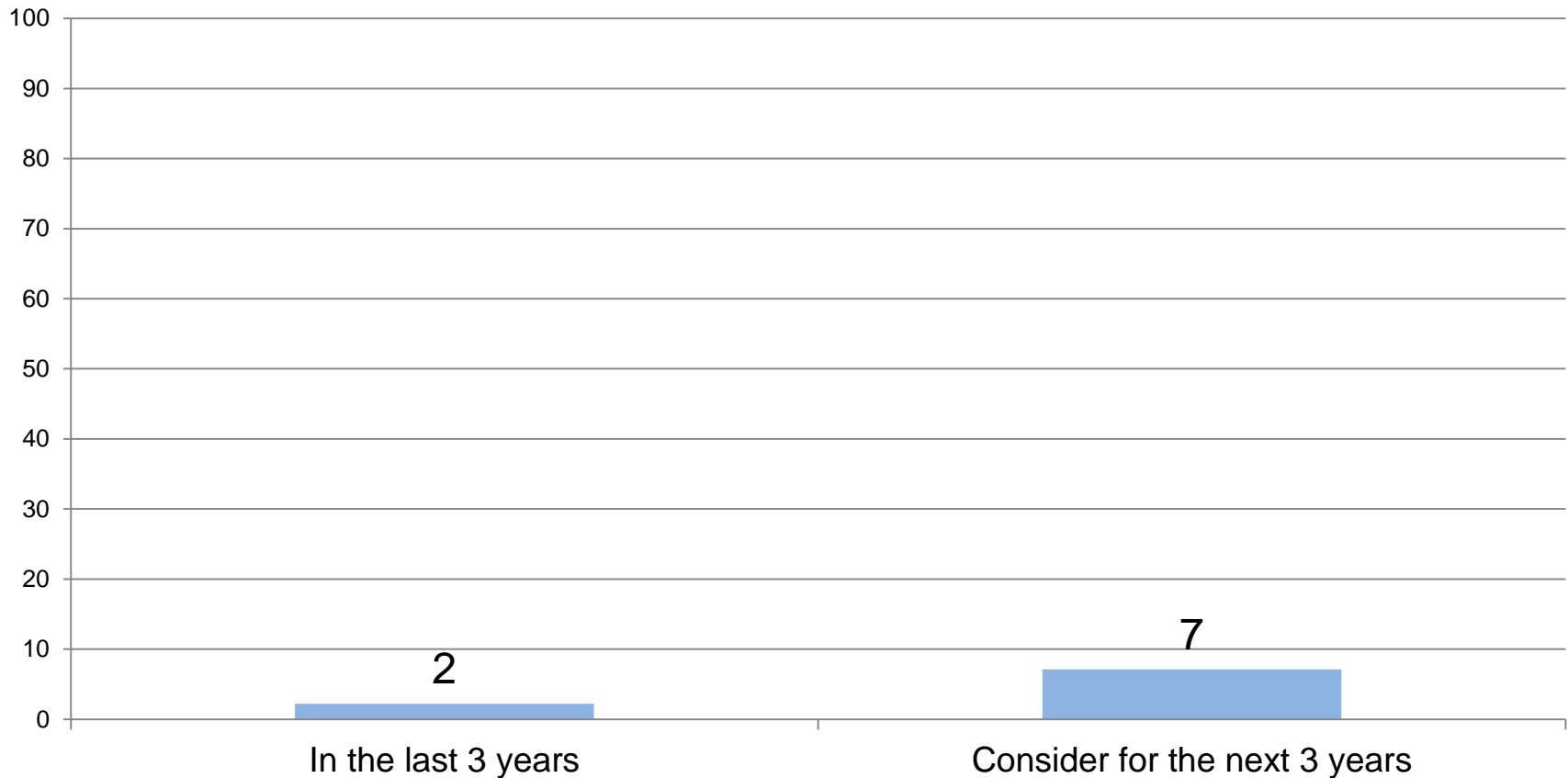
Q9: Why did you choose a privately rented accommodation? How important were the following aspects? (multiple responses), in per-cent
n=204, DGT Survey 2016, Convenience Sample (German Facebook users), May 2016

Booking with AirBnB, Wimdu or similar in the last 3 years, Jan. 2016

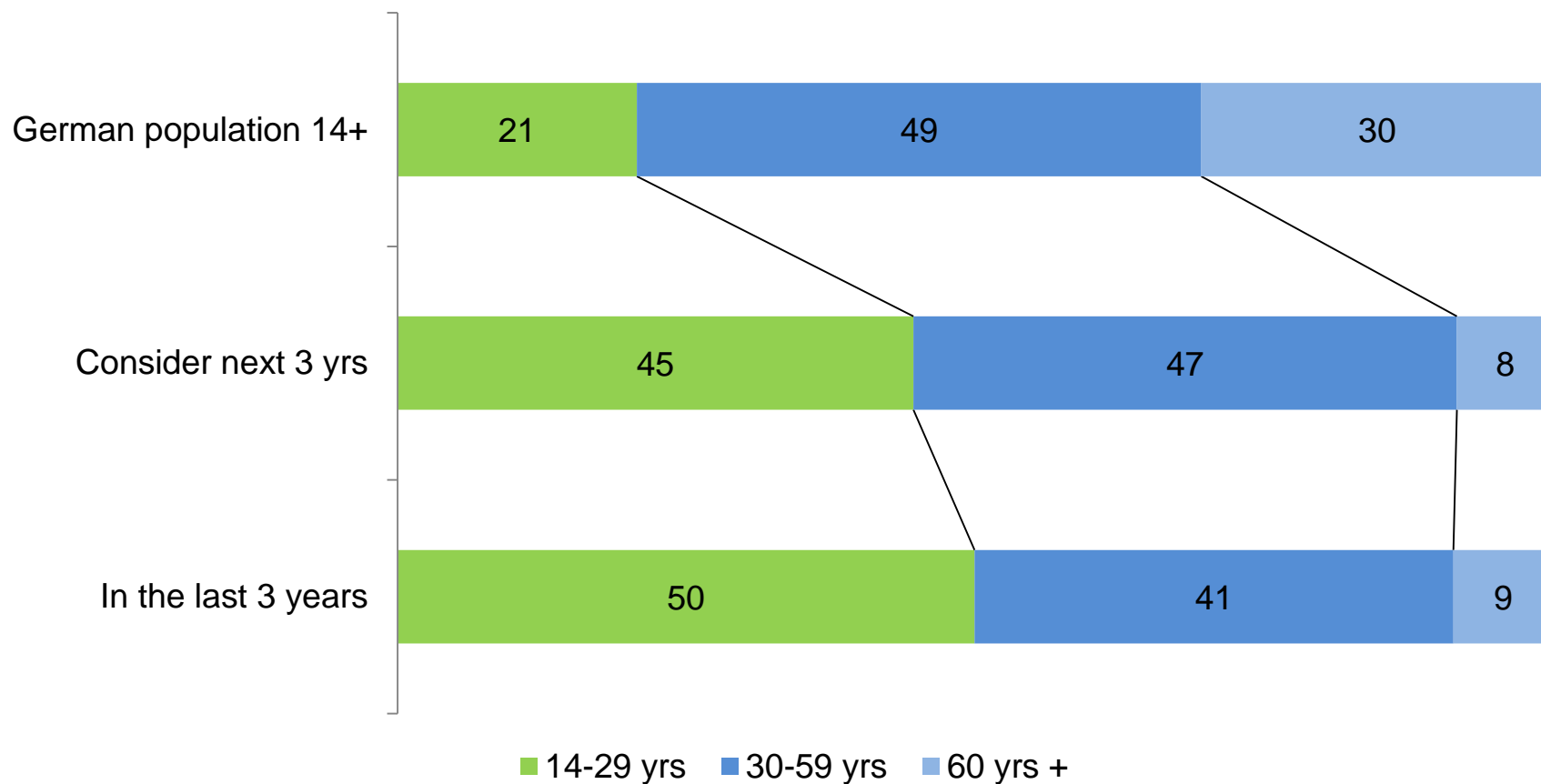


53,4 Mio. holiday travellers in Germany (Germanspeaking population 14 years and older), n =5,945, January 2016, in per-cent.
Source: RA 2016 *face-to-face*

Booking with AirBnB, Wimdu or similar, Jan. 2016



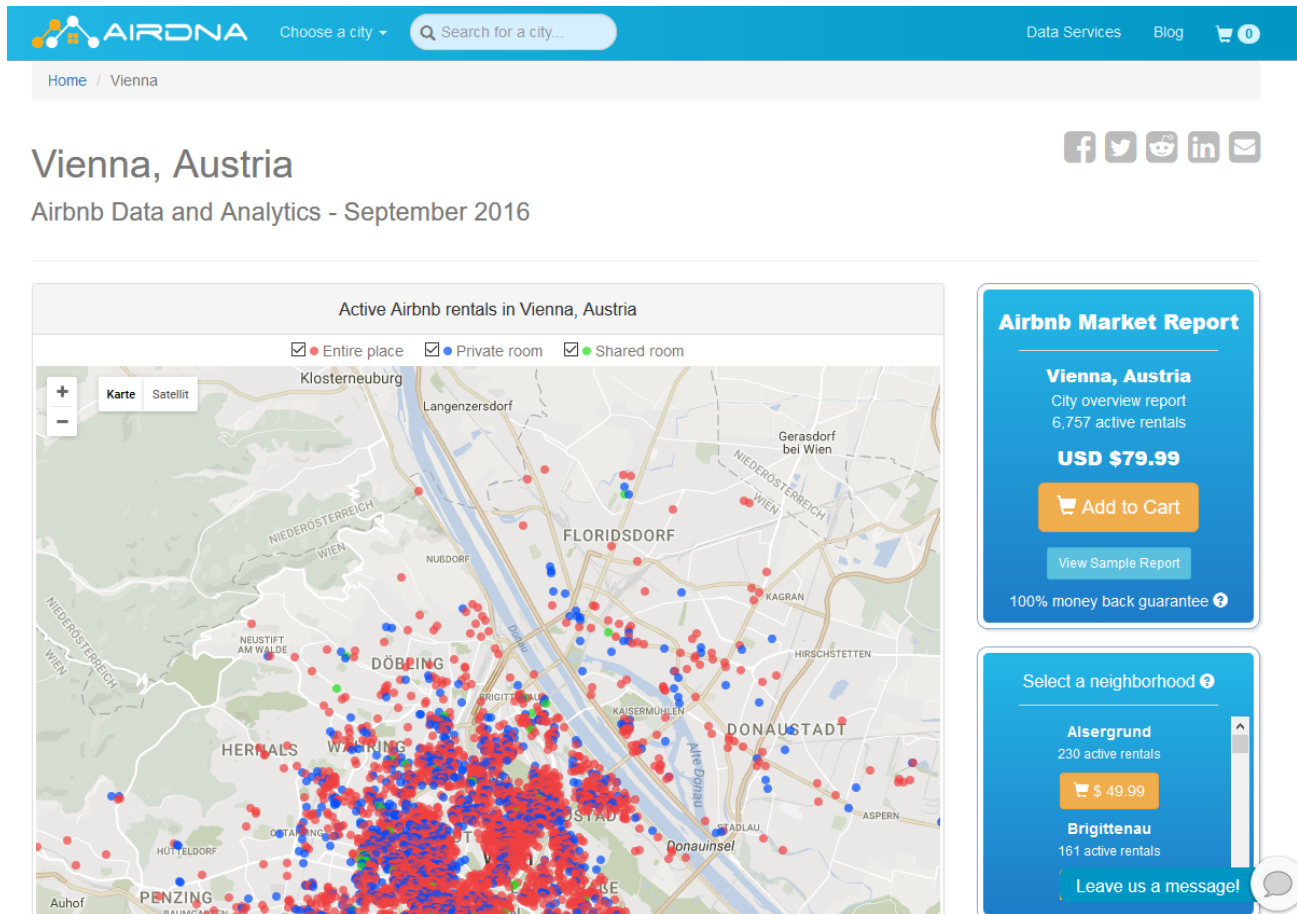
53,4 Mio. holiday travellers in Germany (Germanspeaking population 14 years and older), n =5,945, January 2016, in per-cent.
Source: RA 2016 *face-to-face*



53,4 Mio. holiday travellers in Germany (Germanspeaking population 14 years and older), n =5,945, January 2016, in per-cent.
Source: RA 2016 *face-to-face*

Listing data


Survey data






Data scraping from airbnb.com

[Code](#) [Issues 3](#) [Pull requests 1](#) [Pulse](#) [Graphs](#)

Branch: master [airbnb-data-collection / export_spreadsheet.py](#) [Find file](#) [Copy path](#)

 **tomslee** Bounding box search now updates survey table Survey_type de0d7bc on 7 May

1 contributor

314 lines (295 sloc) 11.6 KB [Raw](#) [Blame](#) [History](#)   

```
1  #!/usr/bin/python
2  import psycopg2 as pg
3  import pandas as pd
4  import argparse
5  import datetime as dt
6  import logging
7  import sys
8  import configparser
9  import os
10
11  LOG_LEVEL = logging.DEBUG
12  # Set up logging
13  LOG_FORMAT = '%(levelname)-8s%(message)s'
14  logging.basicConfig(format=LOG_FORMAT, level=LOG_LEVEL)
15  START_DATE = '2016-04-02'
16  # START_DATE = '2015-07-24'
17
18
19  def init():
20      """ Read the configuration file <username>.config to set up the run.
21      Copied from airbnb.py
22      """
23      try:
24          config = configparser.ConfigParser()
25          # look for username.config on both Windows (USERNAME) and Linux (USER)
26          if os.name == "nt":
```

Which data can be scraped?

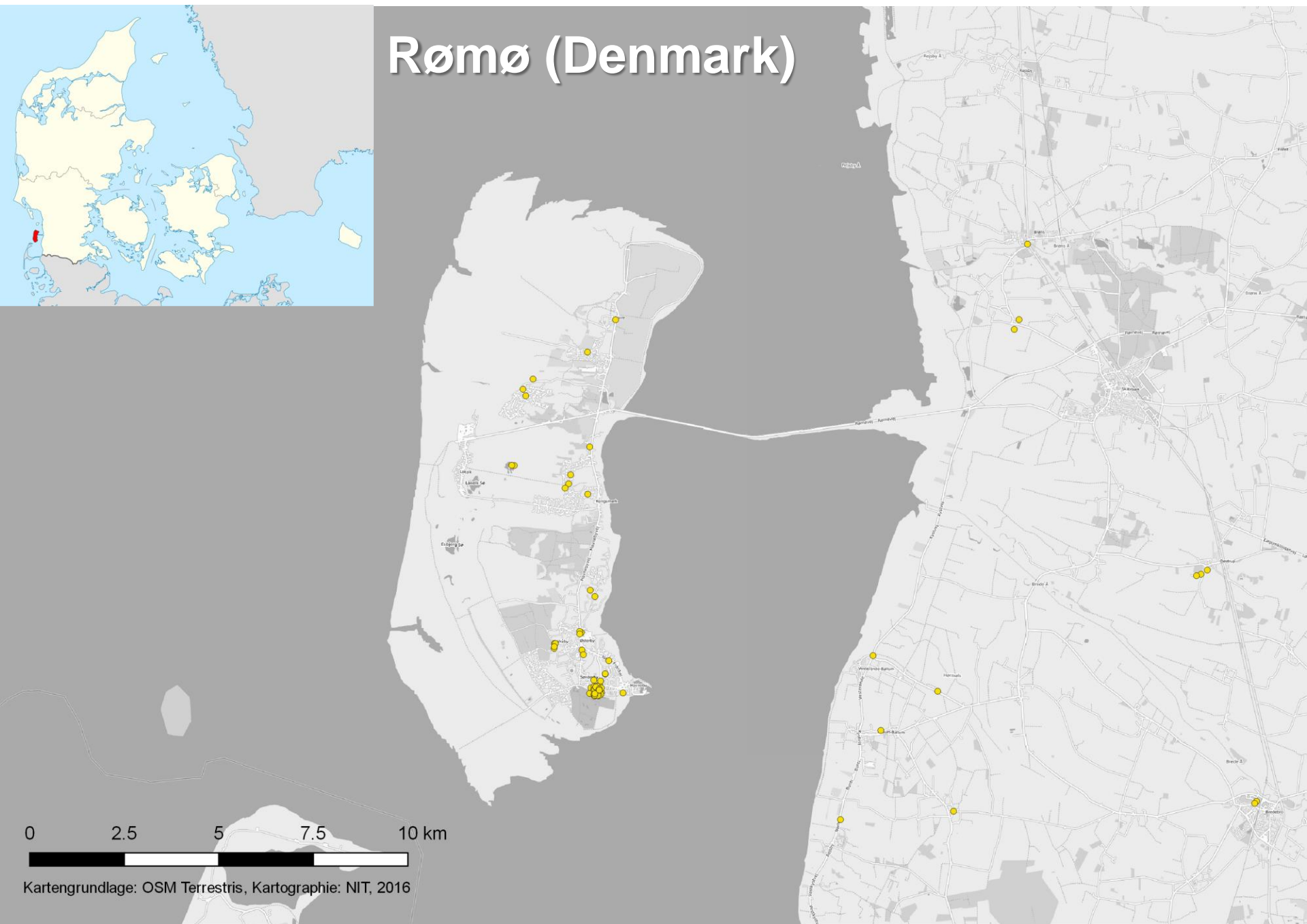
- **Geoposition (more or less exact), neighbourhood**
- **Type of listing (apartments, rooms and beds)**
- **Number of rooms,**
- **Price per unit**
- **Host id**
- **Review number and overall rating**
- **...**

Point in time

- Number of reservations
- Number of days
- Occupancy rate
- Revenue (ADR derived)

Time period

Rømø (Denmark)



0 2.5 5 7.5 10 km

Kartengrundlage: OSM Terrestris, Kartographie: NIT, 2016

• Airbnb listing found when searching for Sylt

Price per accommodate
(apartments), Euro

Sylt	30-50
Other Islands	29-33
Mainland	16-20

0 10 20 30 40 km

Kartengrundlage: VG250/DAGIREF 1.0, Kartographie: NIT, 2016

NIT
NEW INSIGHTS FOR TOURISM

Island of Sylt, Northern Germany

Beds, total

~ 43,000

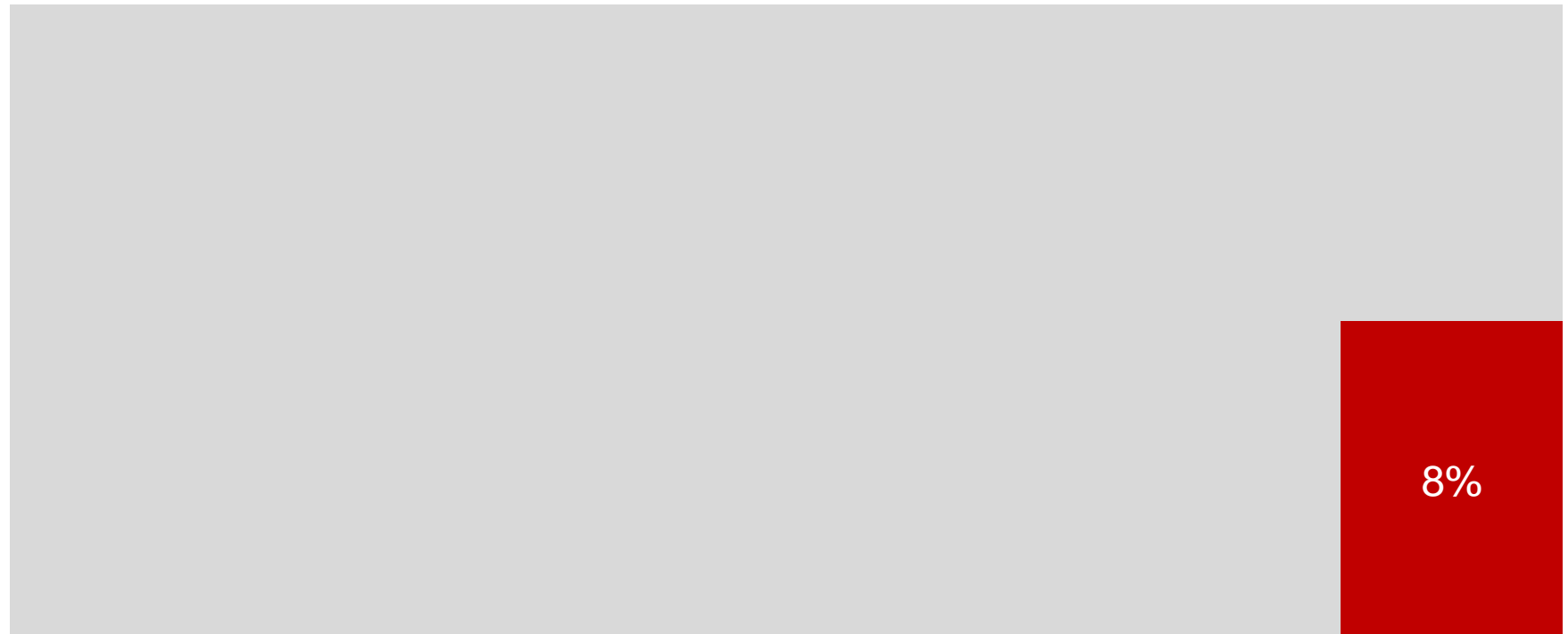
Accommodates, Airbnb

837

2%

Vienna, Austria

Hotelbeds (2015)	Accommodates, Airbnb (est., 2015)
~ 64,000	~ 5.400



Hotelbeds: Wien Tourismus/MA23-Dezernat Statistik Wien, Airbnb: Tom Slee, Aug. 2015, own estimates

Barcelona, Catalonia

Hotelbeds (2015)	Beds in other accommodation (Pensions, hostals, albergs, ...)	Beds in homes/apartments for tourist use (Habitatges d'ús turístic)	Accommodates, Airbnb (est., 2015)
~ 68,000	~ 16,000	~ 40,000	~ 30,000



Hotelbeds/Homes: Ajuntament de Barcelona/Barcelona Turisme: Estadístiques de turisme.




Barcelona: ciutat i entorn 2015, Airbnb: A.A.Sans & A. Quagliere: Unravelling Airbnb: Urban Perspectives from Barcelona. Jan. 2016

	Berlin	Barcelona
Inhabitants (million)	3.4	1.6
Area, km ²	892	101
Airbnb listings (2015)	15,400	14,500
entire home	9,300 (60%)	7,800 (54%)
private room	5,800 (38%)	6,500 (45%)
shared room	200 (2%)	200 (2%)
Airbnb listings per 1,000 inhabitants	4.4	9.1
Airbnb listings per km ²	17.2	143.8

VIENNA

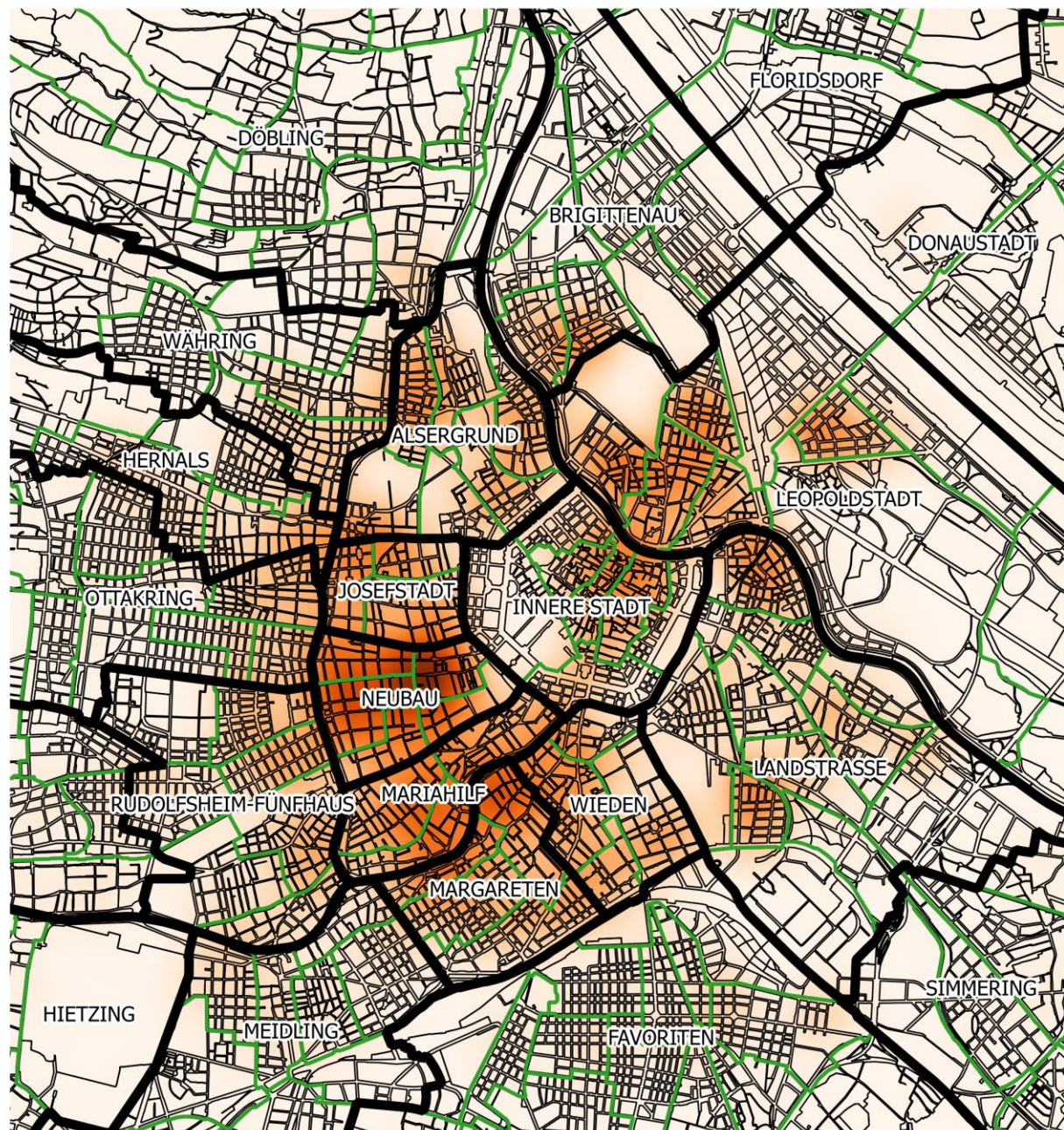
*Density heatmap of Airbnb listings
in the inner city*



-  Bezirk (District)
-  Zählbezirk (Subdistrict)
-  Baublock (City block)

0 1000 2000 3000 4000 m


Administrative boundaries: Stadt Wien,
Magistratsabteilung 21, Feb. 2016; Airbnb data:
Tom Slee, Aug. 2015; Cartography: NIT, 2016




COPENHAGEN

*Distribution of Airbnb listings in
Copenhagen and adjacent kommuner*




 Kommune with listings in the dataset

 Other Kommune

 Bydel (district), City of Copenhagen

Airbnb listing

 Entire home/apt

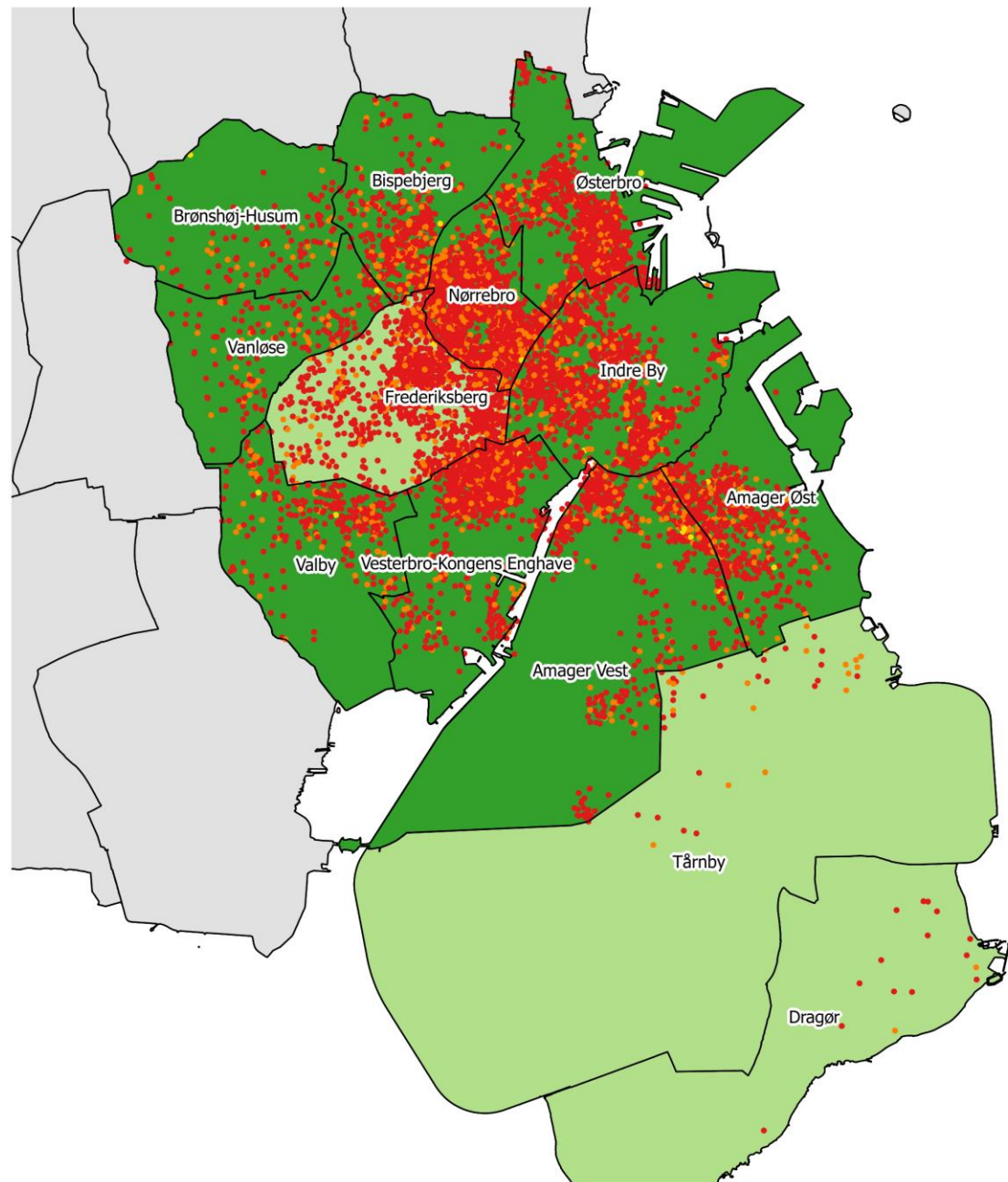
 Private room

 Shared room

0 1000 2000 3000 4000 m



Administrative boundaries: Københavns Kommune
Bydata, March 2016, Kart og Matrikelstyrelsen, DAGI
1.0, Nov. 2011; Airbnb data: Tom Slee, Feb. 2015;
Cartography: NIT, 2016



AMSTERDAM

Average Airbnb prices (entire apartments) by Buurtcombinatie



Prices are given in US-Dollars per night and apartment, based upon 9,100 listings of entire apartments

Mean price (per apartment) is USD 144

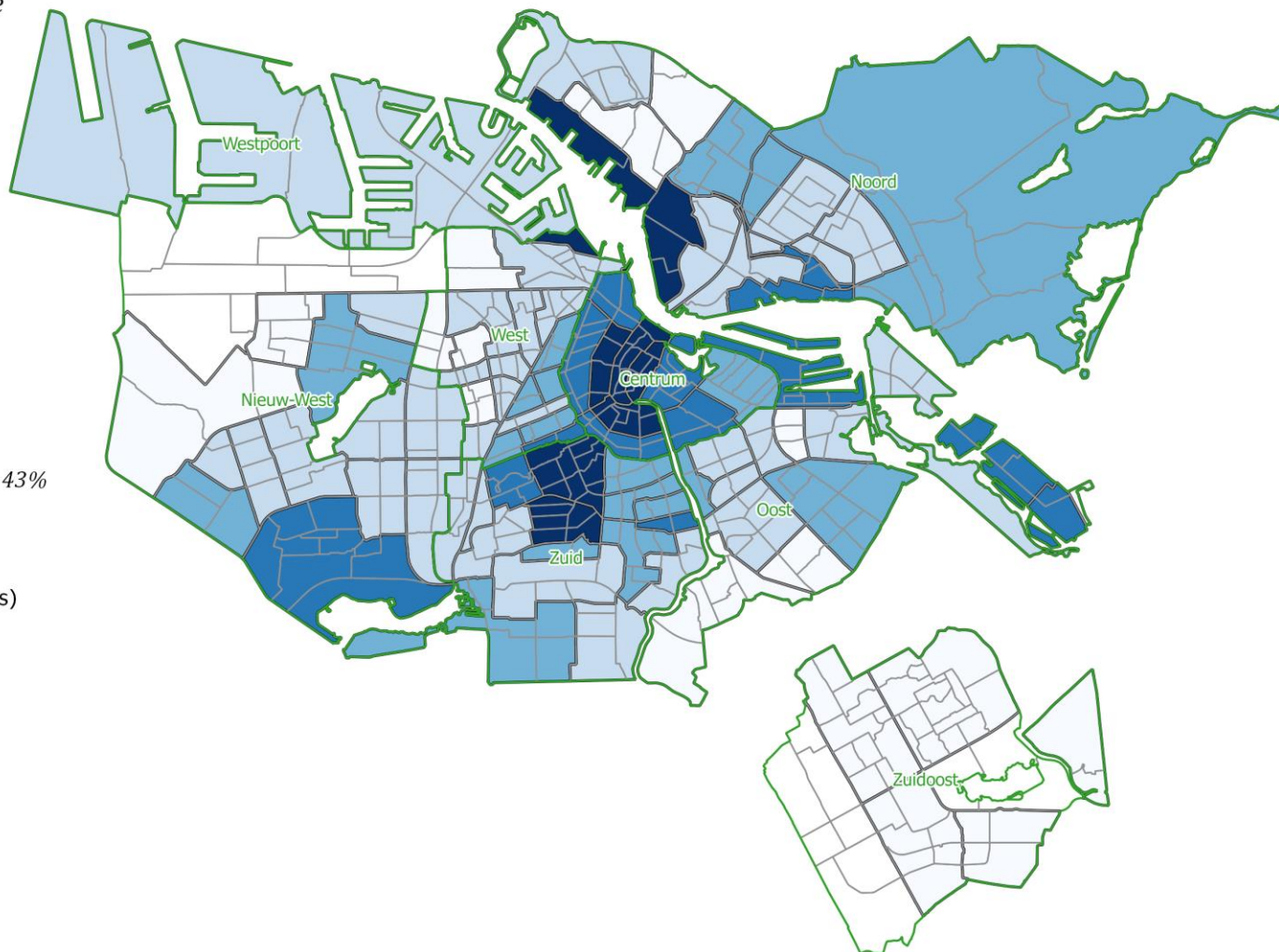
Concentration of listings (Hoover Index): 43%

- Stadsdelen (districts)
- Buurtcombinaties (combined quarters)
- Buurten (quarters)

Mean price per apartment in US-Dollar

- 75 - 106
- 106 - 128
- 128 - 152
- 152 - 181
- 181 - 215

0 1500 3000 4500 6000 m



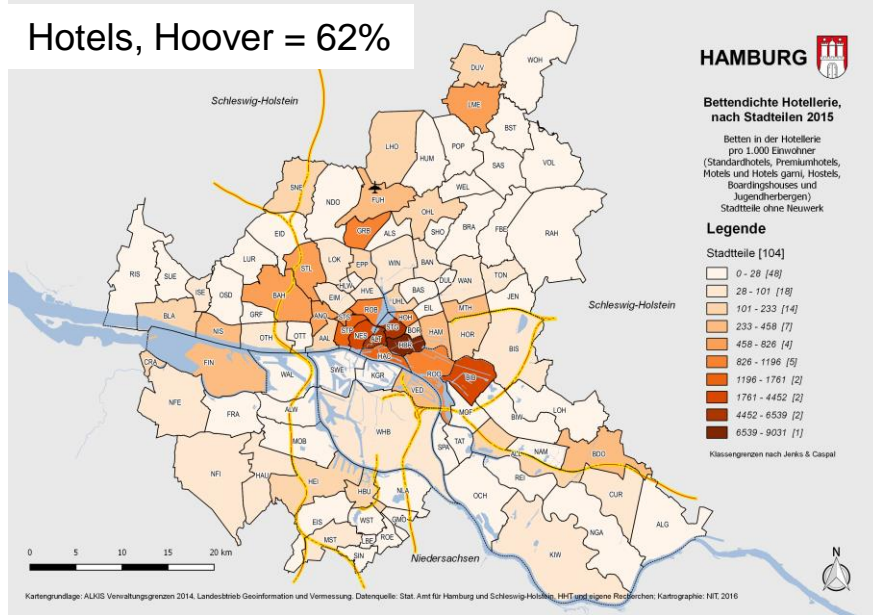
Administrative boundaries: Gemeente Amsterdam, Onderzoek, Informatie en Statistiek, Aug. 2015;
Airbnb data: Murray Cox, Jan. 2016;
Cartography: NIT, 2016

Compare prices?

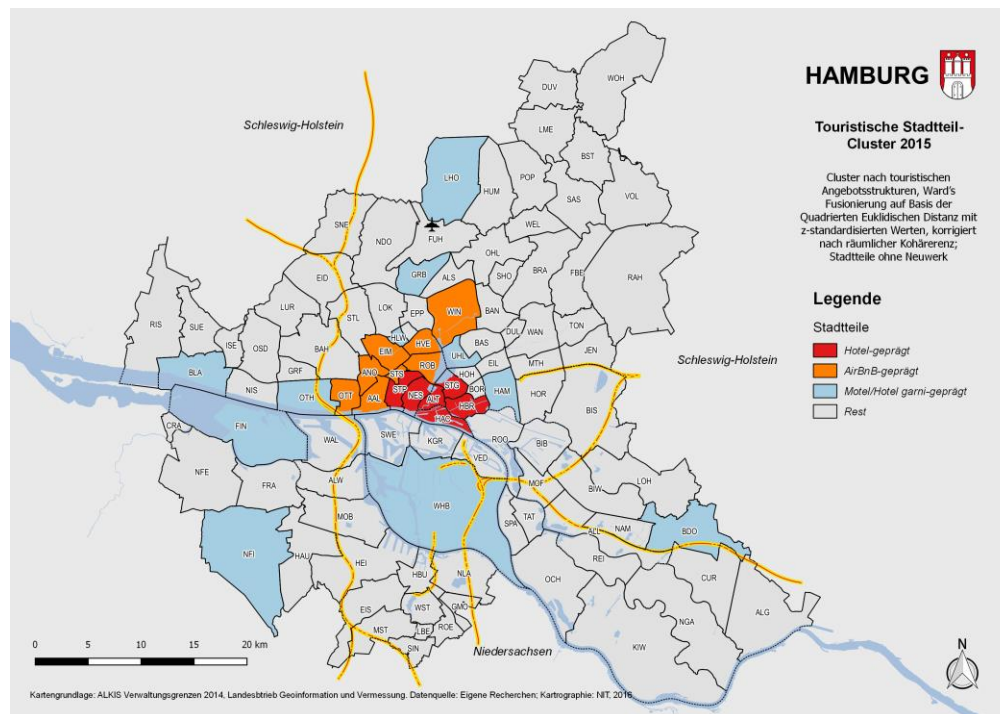
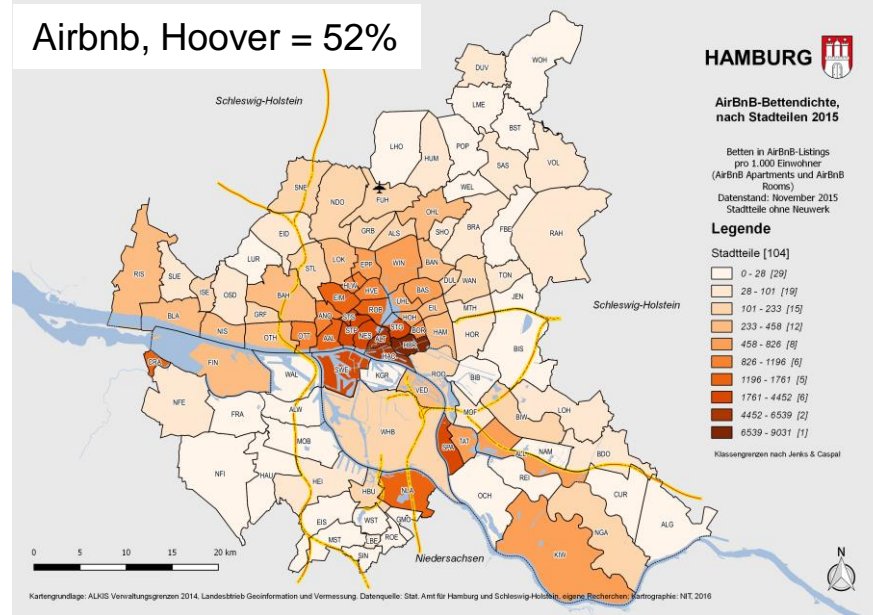
Segment	Metric	EUR
HOTEL	Average Daily Rate (ADR), per room, 2014, exclusive of breakfast and VAT	91
	incl. VAT (7%)	97
AIRBNB	Private room, 2 beds, 2015	46
	Entire home, 2015, 1.8 beds on average	79
	Entire home, 2015, 2 beds on average, central districts	94
YOUTH HOSTEL	DJH Youth hostel, private room, 2-beds, including breakfast, central district	77

Hotel: International Hotel Association (Deutschland), STR Global, Airbnb: Own data

Hotels, Hoover = 62%



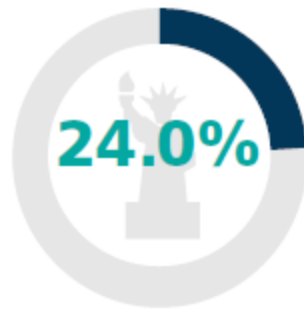
Airbnb, Hoover = 52%



City districts	Hotel cluster	Airbnb cluster	Hamburg, total
Inhabitants	52,000	235,000	1,797,000
Households with children	11%	15%	18%
Real estate, EUR per m ²	1,300	1,700	600
Income tax, per inhabitant	17,000	23,000	18,000
Migration sum, per 1,000 inhabitants	320	260	220
Migration balance, per 1,000 inhabitants	+13	+6	+11

Listing data

Survey data



New York

Nearly a **quarter (24%)**
of Airbnb's revenue
(\$107,471,333) came from
full-time hosts who made
up 3% of operators.



Los Angeles

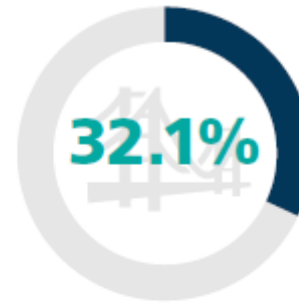
Almost a **third (30%)**
of Airbnb's revenue
(\$79,619,092) came from
full-time hosts who made
up 4% of operators.

full-time host: renting 360+ days per year
Data disputed by Airbnb



Miami

Almost **two-thirds (62%)**
of Airbnb's revenue
(\$76,159,487) came from
multi-unit hosts who made
up 30% of operators.



San Francisco

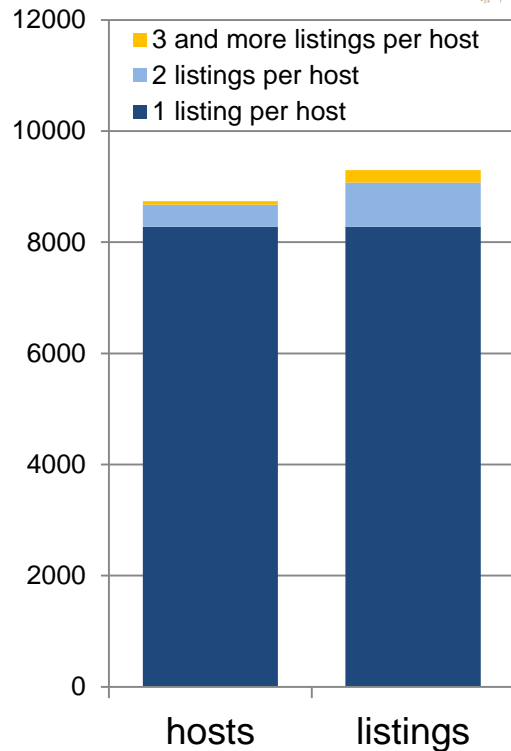
Almost a **third (32%)**
of Airbnb's revenue
(\$58,803,933) came from
multi-unit hosts who made
up 14.9% of operators.

Multi-unit host: 2+ units
Data disputed by Airbnb

Listings per host in selected cities



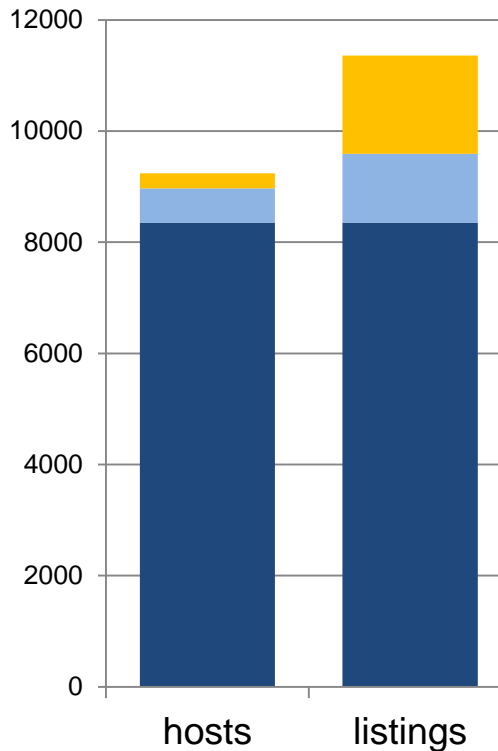
Copenhagen



8,700 hosts
9,300 listings
1.06 listings/host



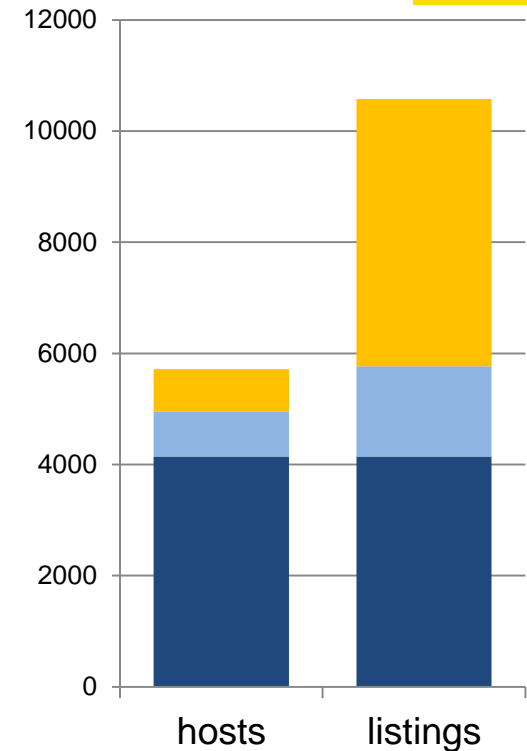
Amsterdam



9,200 hosts
11,400 listings
1.23 listings/host



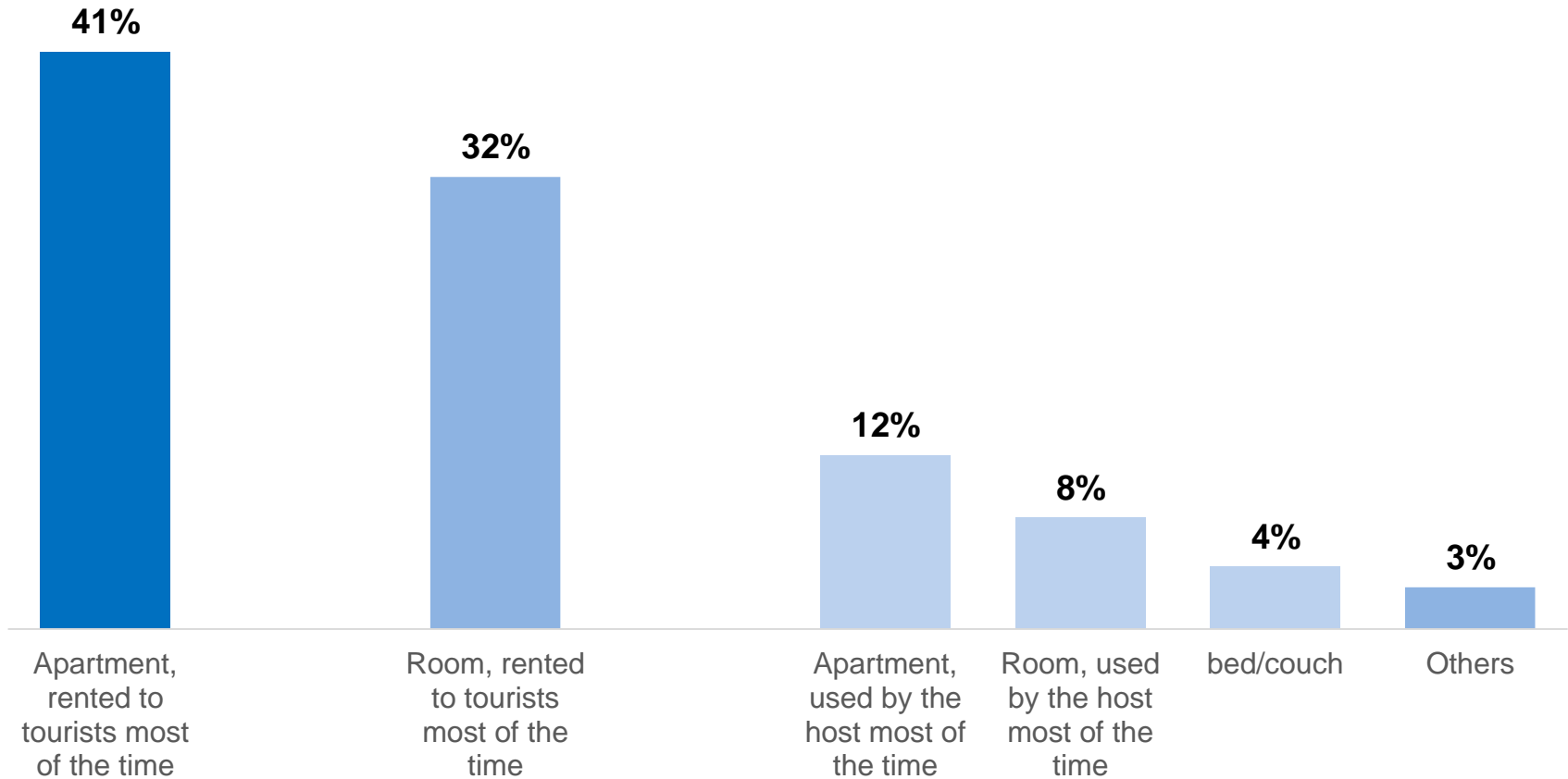
Barcelona



5,700 hosts
10,600 listings
1.85 listings/host

Based upon data from Murray Cox, Tom Slee and others, various years, preliminary data, Analysis: NIT, 2016

Survey: 4 in 10 trips end in a touristic apartment



Q6: Which type of accommodation did you book – which of the following descriptions fits best? Answers in per-cent
n=204, DGT Survey 2016, Convenience Sample (German Facebook users), May 2016

Reviews on a 0-5 scale

Entire home

Room

	Entire home	Room
Total rating (avg)	4.6	4.5
Cleanliness (avg)	4.5	4.4
Description (avg)	4.8	4.6
Value for money (avg)	4.7	4.5

Airbnb listings on the island of Sylt, May 2016, own data

People like the platform more than the accommodation – do they like the idea more than the reality?

		not at all likely						extremely likely				
	NPS	0	1	2	3	4	5	6	7	8	9	10
	D-P	„Detractors“						„Passives“		„Promoters“		
Booking platform	+ 79	4%						10%		83%		
Destination	+ 66	7%						17%		73%		
Type of accommodation	+ 60	10%						19%		70%		

Net Promoter Score (NPS, Reichheld 1996) = Share of Promoters (9/10) – Share of Detractors (0-6)

Q8: How likely is it that you would recommend [this booking platform, this destination, this type of accommodation] to a friend or colleague? Answers in per-cent

n=204, DGT Survey 2016, Convenience Sample (German Facebook users), May 2016

A banner for Airbnb's 'Live There' campaign. It features a close-up of a man and a woman smiling at each other. The background is slightly blurred, showing red curtains and a black metal railing.

LIVE THERE

Book homes from local hosts in 191+ countries and experience a place like you live there.

[Learn About Airbnb](#)

A banner for Airbnb's 'Stay with Locals and Meet Travelers' campaign. It features a group of five people (three women and two men) smiling and posing together. The background is a bright, slightly blurred outdoor setting.

Stay with Locals and Meet Travelers

Share Authentic Travel Experiences

[f Join with Facebook](#)

[Join with Email](#)

Accommodations booked through hosting platforms increase the size of the pie – *and* compete with hotels.

Importance of hosting platforms
differs hugely between cities.

Bestsellers: Whole apartments
by multi-unit hosts.

Shared accommodations evoke problems, but currently, nobody knows when to intervene.

We risk to drown in (listing) data.

Meaningful metrics can hardly be established
by one city alone.

Hosting platforms will not kill the city (or city tourism).



Accommodation on hosting platforms	Hotel accommodation	Living environment
Listings, accommodates, structure	Beds, rooms, structure	Housing and housing prices socio-economic structure
Growth	Growth	
Spatial distribution	Spatial distribution	
Prices	Prices	
Bookings and demand	Demand	

Comparable, meaningful metrics.

Thank you.

Dirk Schmücker
Head of Research

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in Nordeuropa GmbH
Fleethörn 23
D-24103 Kiel

dirk.schmuecker@nit-kiel.de