

Airbnb's økonomiske betydning i Danmark – Trends og regionale forskelle

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Metoder til at opgøre omfang og indhold af Airbnb i Danmark – storbyer og kystområder

1. Hvad Airbnb selv har offentliggjort
2. Skrabe-tjenester (insideairbnb, CPH 28.06.2016)
3. Geografiske søgninger på Airbnb
4. Manuelle skraber fra Airbnb's websted

Hvad Airbnb selv har offentliggjort

- 2014: 1 mio. personnætter 214.000 gæster
- 2015: 1,7 mio. personnæt. 405.000 gæster
- 04.2016 til og med 03.2017:
 3 mio. overnatninger 732.000 gæster

Fortolkning af hvad Airbnb selv har offentliggjort

År	Gæster	mio. person- nætter	Opholds- længde	Personer pr. enhed	Bolig- nætter	Pr. bolig/nat (*)	Overnat. oms. mio. kr.		
2012	28.000								

2014	214.000						265		
2015	405.000	89%	1,0	70%	4,7	2,5	0,4	664	451
2016, est.	650.000	60%	1,7	58%	4,2	2,5	0,68		711
			2,7		4,1	2,5	1,07		
04.16-03.17	732.000		3,0		4,1	2,5	1,2		796

HVIS overnatningsforbruget udgør fx 40% af det samlede forbrug

så udgjorde hele forbruget $0,71 \text{ mia.} / 0,4 = 1,8 \text{ mia. kr.}$ i 2016 mod 1,1 mia. kr. i 2015 og 0,7 mia. i 2014.

Når overnatning pr. lejet bolig koster 664 kr. pr. nat ("14.600 kr. pr. år pr. udlejer, 22 bolignætter pr. år", Airbnb 3.6.2017) og når der er 2,5 person pr. bolig og hvis overnatning=40% af samlet forbrug, så er døgnforbruget=664 kr.

Fra "Airbnb i Danmark – et overblik", 2015

Værter

21.000

Tvivlsomt: ligner totale antal opslag

Værter, der har haft gæster i løbet af det seneste år

$21.000 * 1,083 = 22.743$ boligopslag i DK med gæster (??) i 2015 (for mange)

37

Gennemsnitsalder for værter

2,5

Gæster per booking

13.800 kr.

Årlig indtjening for en typisk vært

22

Nætter en typisk bolig udlejes årligt

Gæster

405.000

Tvivlsomt: nok nærmere 300.000 i 2015

Gæster, der rejste til Danmark i løbet af det seneste år

(711.000 gæster siden 2009)

$405.000 * 4,2 = 1,7$ mio. person-nætter

4,2 nætter

Gennemsnitslængden af et ophold, per gæst

Hele DK: OK

3,8 nætter pr. gæst i CPH

337.000

Gæster, der rejste fra Danmark i løbet af det seneste år

(636.000 siden 2009)

Airbnb i DK, CPH og provinsen 2015 (1)

		B	C	A	
2015	M1-M12	Copenhager	Rest of DK	Denmark	
	Guests	280.000	31% 125.000	405.000	1
	Nights per stay	3,8	5,1	4,2	2
	Person nights	1.064.000	37% 637.000	1.701.000	3

Kilder: Airbnb's egne skriftlige angivelser (A og B). – C er differencen mellem de to.

A: "Airbnb i Danmark – et overblik", ultimo 2015.

B: "Overview of the Airbnb Community in Copenhagen", year 2015,

Antal ankomne Airbnb gæster i DK 2015 virker ganske vist som højt tal.

Men da nu Airbnb selv er angivet tallene, så videregives de her – og ganges med opholdslængden.

Airbnb må selv stå på mål for, om det stemmer. – Det er vi vel nødt til at gå ud fra, at det gør?

Airbnb i DK, CPH og provinsen 2015 (2)

		B	C	A	
2015	M1-M12	Copenhager	Rest of DK	Denmark	
	Guests	280.000	125.000	405.000	1
	Nights per stay	3,8	5,1	4,2	2
	Person nights	1.064.000	637.000	1.701.000	3
	Persons per group	2,3	2,92	2,5	4
	Rental nights	462.609	217.791	680.400	5
	DKK per rental night **	680	576	647	6
	Mill. DKK rental **	315	125	440	7
** ex. 12% booking fee - which will be added. - 3% host fee will be subtracted					8

Antal boligopslag på Airbnb vs. hotelværelser



Airdna.co har nye tal for nogle kommuner

	kommune	Listings 02-06- 2017	
1	København	10672	
2	Frederiksberg	1494	
3	Århus	1149	
4	Gribskov	517	
5	Haderslev	436	
6	Viborg	425	
7	Odsherred	399	
8	Odense	368	
9	Bornholm	364	499
10	Aalborg	363	

11	Gentofte	327	
12	Tårnby	269	
13	Halsnæs	267	
14	Syddjurs	253	
15	Gladsaxe	247	
16	Frederikshavn	236	
17	Silkeborg	231	
18	Roskilde	216	
19	Hjørring	214	
20	Faaborg-Midtfyn	212	
21	Helsingør	194	
22	Rudersdal	190	
23	Vordingborg	190	
24	Svendborg	180	
25	Lyngby-Taarbæk	180	

Airbnb på Bornholm

Type	Number of listings	Price per night DKK	Instant booking %	WIFI%	Super-host %	Available% tonight	Available% week 38	Instant avail. week 38
Whole	296	681	22%	70%	6%	6%	44%	8%
Room (+shared)	83	382	43%	94%	4%	19%	58%	25%
2016-09-12	379	615	26%	75%	6%	9%	47%	12%

Beware: The weighted** average price per renting unit per night is lower than the unweighted simple average of 615 DKK (82.50€).

Note: Week 38 is (was) "next week", and is (was) after end of high season.

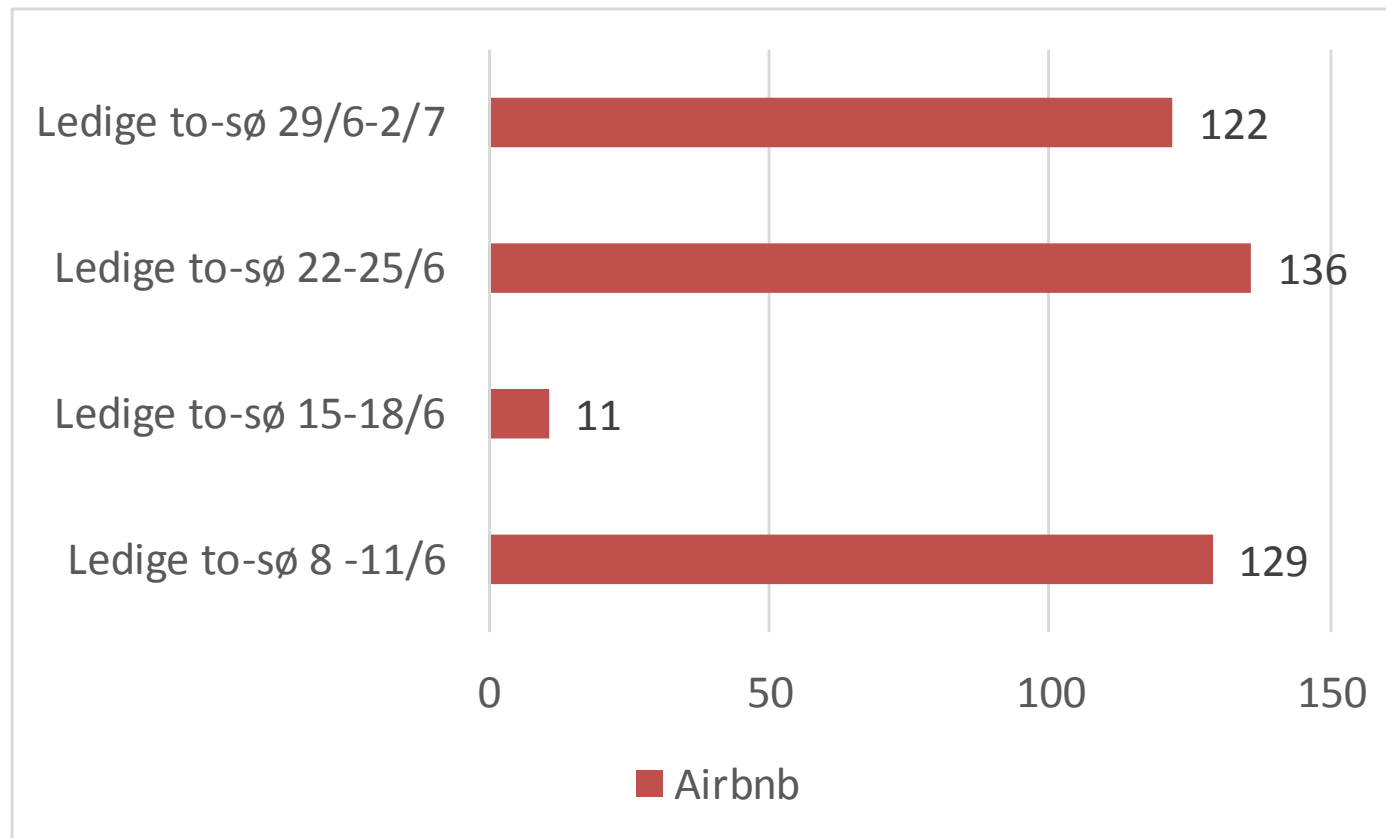
** Weighting can be by number of reviews.

Airbnb på Bornholm sept. 2016 – 5. juni 2017

Bornholm	12-09-2016	05-06-2017	8 mdr.
Opslag i alt	379	499	32%
online	99	200	102%
online %	26%	40%	<<
wi-fi	75%	81%	
Hel bolig %	78%	78%	
Værelse/delt	22%	22%	
Listepris, DKK	615	611	
Superhost %	6%	7%	

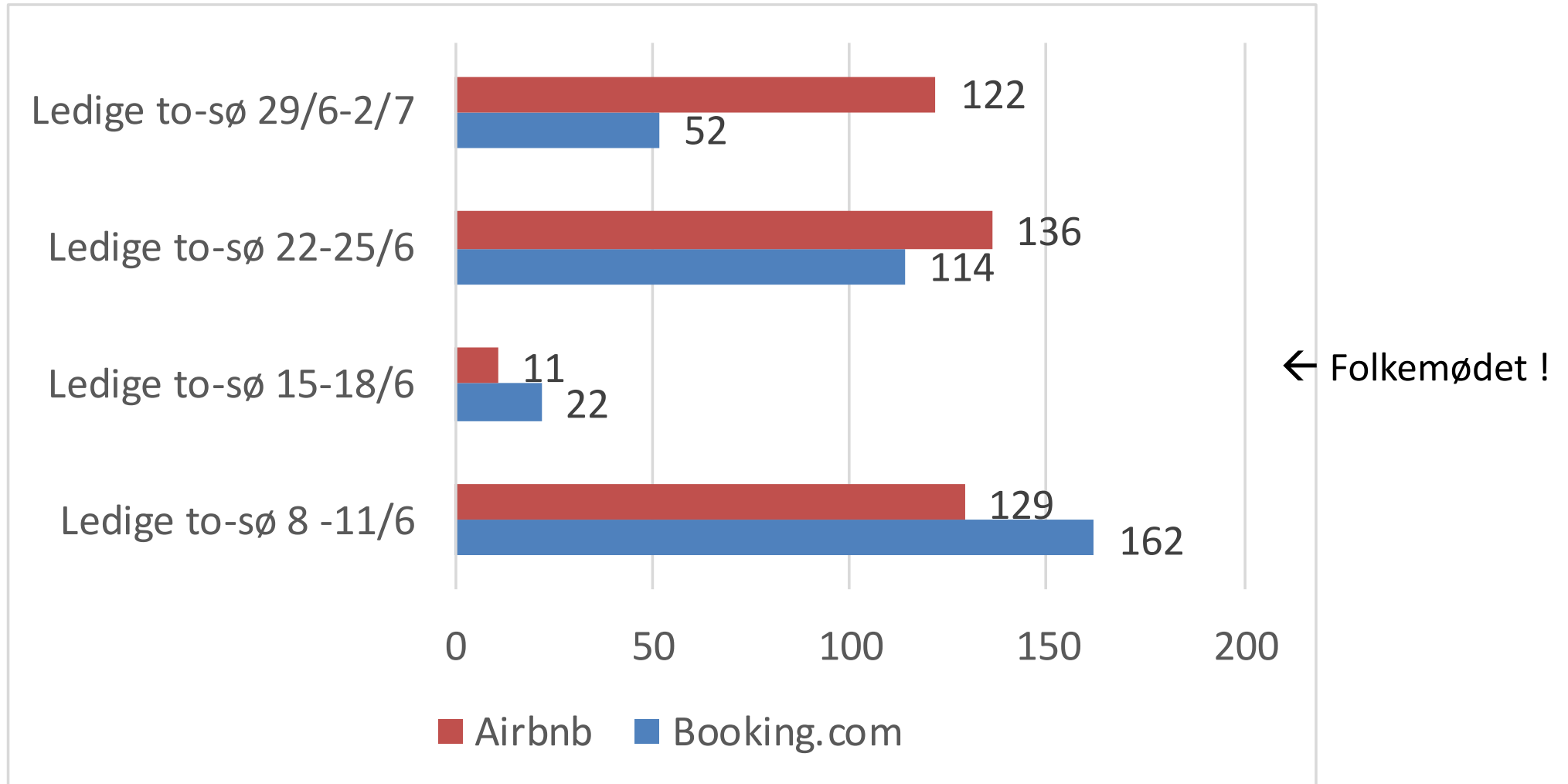
Den hurtige stigning i antallet af og andelen af online bookbare overnatningstilbud ... er vel nok den mest markante trend ... i al fald på Bornholm ... og muligvis i hele DK

Ledige boligtilbud hos Airbnb torsdag-søndag på Bornholm - Hvad sker der på øen medio juni? *



← * Folkemødet !

Ledige boligtilbud torsdag-søndag på Bornholm: Airbnb vs. Booking.com



Hvilke faktorer har betydning for høj rangering?

- Jo bedre bedømmelse (x), jo højere rangering ($r=0.418^{**}$)
- Jo flere reviews, jo højere rangering ($r=0.258^{**}$)

- Jo færre personer, der er plads til, jo højere rangering ($r=0.318^{**}$)
- Jo færre soveværelser/badeværelser, jo højere rangering ($r=0.146^*/r=0.133^*$)

(x) På 1-5 skala, hvor ingen scorede under 3,5 !! – men hvor kun 46% (101 af 220) havde en oplyst rating. Gn.snit=4,6 !

**=stærkt signifikant sammenhæng. - *= signifikant sammenhæng.

En række faktorer havde ikke nogen signifikant positiv eller negativ sammenhæng med rangeringen, rangordenen.

Airbnb, servicegebyr og markedsføringsloven

Airbnb vælger fortsat (pr. juni 2017) at vise priser på første skærbillede ekskl. servicegebyr.

Iflg. den danske markedsføringslov skal priser vises inkl. alle gebyrer:

Det følger bl.a. af markedsføringslovens § 12 a, stk. 1, nr. 6, at en erhvervsdrivende i forbindelse med såkaldt "købsopfordring" som udgangspunkt skal oplyse den samlede pris inklusive afgifter for produktet eller tjenesteydelsen.

Man har samme regler i fx Norge, hvor Airbnb også (fortsat) viser priser ekskl. servicegebyr, til trods for, at den norske forbrugerombudsmand [for længst](#) har bedt Airbnb om at rette ind.

De danske og norske love flugter med [nordiske](#) retningslinjer vedr. prisoplysninger side 12 af 20: "På det første skærbillede, hvor der oplyses en pris, skal det være prisen inklusive alle omkostninger og gebyrer, som direkte kan henføres til varen eller tjenesteydelsen, der oplyses".

Tak for opmærksomheden !

Slut på CHM's indlæg

Spørgsmål? -- Kommentarer? -- efter JZ's indlæg

Airbnb on Bornholm – compared to CPH

Bornholm: No. of listings, end of sept. 2015: 220
Bornholm: No. of listings, middle of sept. 2016: 379
Bornholm: No. of listings, 5 June 2017: 499

Increase 1: 72% in 347 days end 09.15-12.09.16, ~76% in 365 days.

Increase 2: 31% in 266 days 12.09.16-05.06.17, ~43% in 365 days.

Copenhagen city+sububs : 16,150 Airbnb listings by middle of 2016.
670,000 person nights in 2015=**8.2%** of 8.2 mio. registered bednights.
1.2 million person nights in 2016=**13.9%** of 8.6 mio. regist. bednights.

Bornholm: 2.3% of CPH Airbnb listings 2016. 18% of CPH regist. nights.

→ **Airbnb is more predominant in CPH city+sububs than on Bornholm.**

Airbnb to regist. nights	2010	2011	2012	2013	2014	2015	2016
Airbnb Copenhagen %	0,0%	0,1%	0,4%	1,3%	3,1%	8,2%	13,9%
Airbnb Bornholm %	0,0%	0,0%	0,1%	0,3%	0,7%	1,1%	1,9%

Airbnb i DK, CPH og provinsen 2015 (3)

		B	C	A		
2015	M1-M12	Copenhager	Rest of DK	Denmark		Kilder:
	Guests	280.000	125.000	405.000	1	A: "Airbnb i DK". B: airbnbcitize
	Nights per stay	3,8	5,1	4,2	2	Airbnb: se tidl. slide.
	Person nights	1.064.000	637.000	1.701.000	3	1 * 2: ~Airbnb
	Persons per group	2,3	2,92	2,5	4	A: Airbnb. B: Skøn. C: Residual.
	Rental nights	462.609	217.791	680.400	5	A: ~Airbnb. B: Skøn. C: Residual
	DKK per rental night **	680	576	647	6	A: Estimat. B. Vægtet, Insideairbnb
	Mill. DKK rental **	315	125	440	7	Moderat estimat, givet 5 og 6.
** ex. 12% booking fee - which will be added. - 3% host fee will be subtracted					8	Circa (12%), Airbnb.com.
	Accommodation spending, %	40%	40%	40%	9	ca., jf. Eurostat (tour_dem_exe
	Total spending, m.DKK	786	314	1.100	10	#7 / #9
	Døgnforbrug, DKK	739	492	647	11	#10 / #3
	Døgnforbrug, EUR	99	66	87	12	#10 / 7.46
	Forbrug pr. ankomst €	377	336	364	13	Airbnb indikerer 1000€ pr. ankomst
	Forbrug pr. gruppe €	866	983	910	14	#13 * #4.
	Airbnb book. fee, 12%	38	15	53	m.kr.	Cirka 12%, ud fra Airbnb.com.
	Airbnb host fee, 3%	9	4	13	m.kr.	Airbnb angiver selv 3%.
	Total Airbnb fees, 15%	47	19	66	m.kr.	Sum.

Links to news sources about Airbnb – in Denmark (in Danish language)

<http://politiken.dk/search/?q=airbnb> – 481 search results from Politiken

<http://jyllands-posten.dk/arkiv/?q=airbnb> – 207 search results from Jyllands-Posten (JP)

<http://www.business.dk/search/airbnb> (Berlingske Group) - 202 search results

<http://www.b.dk/search/airbnb> - 169 search results from Berlingske

<http://www.bt.dk/search/airbnb> - 124 search results incl. links to e.g. Berlingske <http://www.business.dk/>

<http://www.horesta.dk/da-DK/Global%20Items/Search.aspx?search=airbnb> – 18 search results

Kilder

airbnbaction.com: “Airbnb i Danmark, et overblik”.

airbnbcitizen.com/data/: Copenhagen (seneste: Året 2015).

airbnb.com: Gennemsnitspriser, simple gn.snit (+ca. antal)

airdna.co: Antal overnatningstilbud (tidl. ~12, nu ~18 kommuner)

insideairbnb.com: København kom., Fr.berg kom. (1 by, 2 kom.)



CENTER FOR REGIONAL- OG TURISMEFORSKNING

Airbnb Economic Impact – trends and regional economies

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Presentation at InnoCoast workshop “Deleøkonomi og Kystturisme,
6 juni 2017 ved Aalborg Universitet, København

Literature review

Literature review: relevant articles, such as

Zervas, G., Proserpio, D. & Byers, J. W. (2013): The rise of the sharing economy: estimating the impact of Airbnb on the hotel industry. *Internet publishing*

Pariolero, N. (2015): Assessing the effect of Airbnb on the Washington DC housing market. *Internet publishing*.

Fang, B., Ye, Q. & Law, R. (2016): Effect of sharing economy on tourism industry employment, *Annals of Tourism Research*, 57, 264-267.

The above mentioned articles are based on econometric analysis, not based on the modelling approach.

Quite a number of media articles are collected via online searching referring the issues of Airbnb in Denmark. We find some interesting paradoxes in the argument.

Paradox in the argument for Airbnb

- **Paradox 1:** e.g. hotel organizations: Airbnb is unfair competition, making hotels to lose their market shares. They suggest the government make legislation and restriction on Airbnb; on the other hand, Airbnb do have supplement function when in shortage of supply for hotel rooms.
- **Paradox 2:** local residents: Airbnb helps some residents to rent out their idle houses /rooms to compensate to their expenditures; on the other hand, some other residents might be disturbed by the tourists in the residence areas – issues like public safety, disturb and noise.
- **Paradox 3:** the politicians and decision makers: Airbnb can help local tourism destinations to release the so-called “high-price power” of hotel sector, especially during the tourism’s peak seasons; on the other hand, decision makers worry about the market disorder in house markets, house-renting market; as well as the effects on residents welfare associated with living condition.

Main actors in Airbnb business

- **Tourists:** Existing markets or a new market? Length of stay and party size; leisure or business.
- **Hosts:** Profiles like age education and quality of apartment, listing prices, location and entire apartment or shared rooms.
- **Neighbourhood:** Positive or negative attitude towards Airbnb? Evaluating the social relations.
- **Accommodation organization:** arguing for unfair competition; Restriction, and regulation.
- **Other businesses:** good with extra income and economic growth.
- **Government:** evaluation of impacts of Airbnb; taxation issues, public safety, impacts on house market; social relations;
- **Academics and destination developers:** Arguing positively: idle resource, efficiency, intense competition, agree to regulation and taxation.

Assessing the impacts of Airbnb

- **Social impact analysis:** conducting an interview with the local residents, policy makers and other destination developers to understand social relationships between local communities and Airbnb tourists. This should also include the assessment of Airbnb impact on house prices and relationships between the tourists and residents.
- **Political and environmental impact:** to analyzing the relationship between the different partners: hotel organization, local destination, policy makers and local residents. Hotel branch organizations ask for the equal competition and it requires that the hosts of Airbnb should pay the income taxes from their income, however, it is free from taxes if the Airbnb income is under certain amount; as most of Airbnb hosts are partly renting out their apartments /houses.
- **Economic impact analysis:** evaluating the regional economic impact of this new tourist form; to study which areas (cities versus provinces or coastal regions), which sectors have gained the most?

Summary from previous studies

- From previous analysis, it is found that there is no evidence linking the short renting through Airbnb with **house market**; this means that there is no significant influence on **house price**; This point needs further investigation.
- Airbnb can surely save some **transaction costs**, therefore price for overnight is cheaper at Airbnb than normal hotels;
- Airbnb will increase the **frequency of travel**; it will also increase the **length of stay** at destination; it encourage tourists to be more actively participated into the activities;
- Airbnb tourists tend to **spend more** (in the whole trip at destination), increase not only the spending at overnight, **but on various other consumption categories**, for example, eating at restaurant, visiting museums and other attractions, participating other activities, etc.
- Airbnb is not necessary totally replacement for the hotel tourists, it can be that it create some **new tourist market**, that otherwise these tourists will not come to the destinations. Airbnb **competes only with the low priced hotels**, it will not influence business tourists and tourists who stay in the luxury hotels.

Data collection for Airbnb

Previous presentation regarding:

- Data sources
- Variables in Airbnb datasets:
- Methods for data analysis:
- Estimation of number of bed night at Airbnb

In order to evaluate the economic impact of Airbnb on regional economies, we need to know

Total tourist spending at Airbnb

= number of bed night

× average spending per person per bed night

Airbnb in Copenhagen and Denmark

	Airbnb listing in Copenhagen	Airbnb listing in Denmark
Number of hosts	16,000	21,000
Number of guests (inbound)	320,000	405,000
Average earning for a typical host		13,800
Average length of stay	3.3	4.2
Average group size	2	2.5
Average prices of listing	672 Dkr.	

Method for evaluating the impacts of Airbnb

CRT's LINE tourism model: it is applied by VisitDenmark for evaluating the regional tourism impacts in Denmark.

Structure of the LINE model:

- 1) Region by municipalities = kommuner;
- 2) Social account matrices (SAM) is the model framework;
- 3) 2 by 2 by 2 principles: two plays (producers and households), two markets (labor market and commodity market), and two circuits in the model system;
- 4) Tourism demand is totally integrated in the model system.

Tourism demand is located at place of demand, when there is ***an extra increase in tourism demand***, the production will increase, the employment and income at tourist destination will increase, this gives ***direct, indirect and induced effects*** on the regional economies.

Regional impact of Airbnb in Copenhagen

	Airbnb spending as Hotel-leisure	Airbnb spending as hostel
Number of bed nights (in 1000)	320	320
Estimated daily consumption (kr.)	1150	628
Estimated tourist revenue (mil kr.)	368	201

Note: 320000 bed nights account for 12.4% of leisure hotel tourist nights in Copenhagen. It accounts 10% of leisure hotel income in Copenhagen.

Regional impact of Airbnb in Copenhagen

	Hotel-leisure	Hostel
Direct job creation (number)	362	179
Total job creation	502	253
Direct GVA effects (mil. kr.)	113	59
Total GVA effects (mil. kr.)	203	106
Personal income taxes (mil. kr.)	24	12
VAT and other taxes (mil. kr.)	69	36

Future plan (M5) for the project

Model analysis for Airbnb (as a overnight form) and deliverable results for economic impact

- It will be a co-operative work between VisitDenmark and CRT to obtain and estimate the number of Airbnb bed nights and daily spending data for each municipalities;
- CRT will be responsible for the model calculation;
- Time plan is expected to be during later months in 2017 (depending on the Airbnb data);
- It is agreed with VisitDenmark, that Airbnb project will be a separated report after VisitDenmark's yearly TØBBE report.

Thank you for your attention!

Questions for both of us?

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