



REPORT | MAY 29, 2018

Healthy Travel and Healthy Destinations



Foreword

by Jonathan Tourtellot

Tourism has grown to become one of the largest industries on Earth—more than 10 percent of the world’s gross domestic product—and it’s having an impact. A lot of impacts, in fact. Tourism is the ultimate double-edged sword. If done well, it can do a lot of good. It can boost economies and provide jobs; it can educate both locals and visitors; it can promote international understanding; it can motivate conservation and preservation; and it can be a lot of fun. Tourism done poorly, on the other hand, can do plenty of harm—overdevelopment, cultural and environmental degradation, commercial blight, social stress, and crowding to such an extent that a new word has been coined for it: overtourism.

Consider: The number of international trips made in the 1959, when transoceanic jet travel was just getting started, was estimated to be about 25 million per year. In 2017, that figure had grown beyond 1.3 billion¹, a 48-fold increase. Needless to say, the destinations and attractions that these people are visiting have not grown 48 times in size to accommodate them. All other things being equal, the 20 tourists admiring Rome’s Trevi Fountain at a given time in 1959 number almost a thousand today.

And travel demand is only growing larger. According to a 2017 Brookings Institution report, spending by the fast-growing Chinese and Indian middle classes will be about five times that of their North American counterparts by 2030, and much of it will be spent on travel. In many cases, government incentives have encouraged the trend, from aircraft fuel subsidies to looser border-crossing requirements, all reflecting policymakers’ penchant for measuring tourism success by number of arrivals. All too often, tourism tax revenue goes to yet more marketing, rather than to help residents or care for the destination.

At the current rate of increase reported by the United Nations World Tourism Organization, international arrivals could easily exceed 2 billion a year by 2030. And that’s just international! Multiply that figure by four or five² to estimate all the domestic tourist trips that people take every year inside their own countries.

What causes such colossal growth?

¹ UNWTO press release 18003, 15 Jan 2018

² <http://www2.unwto.org/agora/some-points-domestic-tourism>

Three powerful trends have contributed to it. Growth in population, growth in global affluence, and growth in technology, from cheaper transportation in jet airliners and mega-cruise ships, to the Internet.

To be sure, a world with more middle-class wealth, more information, and more chances to travel is generally a positive. We've seen the world without those things, and this is better. But this transformation has also spawned by-products such as mass tourism and over-commercialization. The swiftly evolving Internet adds both problems and solutions to the mix via social media, crowd-sourced information, and the sharing economy.

Including home sharing. What roles does a platform such as Airbnb have in terms of tourism impacts? This report strives to answer some of those questions.

From the destination point of view, tourism can be plotted on a spectrum from beneficial to problematic. At the beneficial end, we can posit that healthy travel is good for the visitor and good for the destination—its people, environment, culture, and character. The goal, of course, is to avoid conditions that fail to do that, as in the case of “leakage,” when a high proportion of tourist revenue goes to the bottom line of a far-away business or corporation rather than helping the local economy.

Style of tourism makes a difference, as well. Day-trippers wielding selfie sticks, for instance, leave the destination with much less per person than travelers who stay for a week, spending more, learning more, and telling more stories about the destination back home—stories that inspire new visitors to plan their own stays long enough to truly appreciate the place. Independent research from Amsterdam, Barcelona and Japan shows that by substantial percentages, Airbnb guests stay longer, attend more cultural events, and share their experiences on social media more than hotel guests. That style seems to make for happier travelers, too: In all three cases, Airbnb guests rate higher than hotel guests in “intent to return” to the destination and in “recommending it others.”

As with any systemic innovation, the sharing economy can have various effects across the range of tourism impacts. With collaboration among stakeholders, those effects tend toward beneficial impacts. To see how, we must explore how tourism works.

Tourism is ultimately all about the destination that people choose to visit. Thus the tourism industry is unusual in that it depends on something it neither owns nor manufactures: The place and its people. Except for manufactured attractions like theme parks and convention centers, tourists come to experience what was, in effect, already there—the scenery, the weather, natural and historic attractions, cultural experiences, and of course, the people.

Framed this way, it's easy to posit that the best type of visitor spending is that which creates a “virtuous circle,” whereby locals who benefit from tourism will in turn have an incentive to protect the character of the destination and enhance its appeal for future guests.

Compared to conventional tourism businesses, the sharing economy has an obvious advantage here: Most of the tourist's lodging budget goes straight to a local resident. No middleman, except for the small percentage collected by the online platform. For Airbnb stays, that means 97 percent of the posted price of their listing remains with the host.

In some overly popular city centers, however, tourism demand can distort the economy, driving up real estate values and displacing residents. What's more, mass tourism tends to spawn mass retail: Familiar international franchises selling their standard stuff and souvenir shops selling T-shirts manufactured in some other country. These generic businesses force out distinctive local shops, eateries and crafts. Historic centers sag beneath too many hotel rooms, too many nonresident units on home-sharing platforms, too many day-trippers and visitors drawn to the same “must-see” attractions. Overtourism.

Many tourists themselves don't like it, preferring more authenticity or, as four out of five Airbnb guests affirm, “to live like a local.” Can a home sharing platform then mitigate the effects of overtourism as much or more than it inadvertently contributes to them? It's worth noting that when costs rise in tourist-saturated or gentrifying districts, the sharing platform can actually help residents stay in place by hosting a spare room to cover higher expenses.

One way to mitigate overtourism is dispersal: Spread visitors throughout the city so they don't overwhelm certain districts and popular sites. Home sharing may help in two ways—one simply because shared listings are often more spread out geographically than commercial lodgings, and the other by what hosts themselves may recommend to their guests.

To the extent that hosts tend to deemphasize a city's conventional, overcrowded sites in favor of their own insider tips—the best neighborhood shops and their own personal favorite locations and attractions—they help with dispersal. In many cases, the data seems to confirm this, as the eight case studies in this report demonstrate. What's more, new services such as Airbnb Experiences add diversity to a city's menu of tourism opportunities and so help to further diffuse tourist traffic.

Many less famous towns and smaller cities, however, could still use a bit more tourism—even more so for rural areas. A majority of humanity now lives in large cities so it's no surprise that a majority of tourists hail from them, many seeking to escape, however briefly, the hustle-bustle of urban living and to reconnect with nature.

Yet many of the world's attractive countrysides are facing threats such as deforestation and desertification; depopulation as people flee to better prospects in the cities; and in some areas, the reverse: invasion by urban sprawl. Home sharing can help in several ways:

- It opens a new revenue stream that can provide an alternative to such questionable rural practices as overgrazing in marginal environments and overdevelopment in urban fringes.
- In some countries, it has proven especially helpful for rural women who learn how to become micro-entrepreneurs. In 10 of 11 recently profiled countries, the majority of rural Airbnb hosts were women.³
- In locales where tourism is just developing, home sharing makes use of existing structures and prompts their restoration, and so weakens incentives for construction of generic hotel blocks that profit distant owners.

Without question, conventional hotels, resorts, and even cruise ships do contribute to certain portions of a local economy. So do homeowners who use their Airbnb earnings to spruce up their houses and hire local labor for cleaning and maintenance. These secondary and tertiary effects are not always evident. Researchers are only beginning to analyze the money flow of the tourism boom.

The sharing economy, the Internet, and surging tourism continue to bring fast-breaking changes to destinations around the world. We need more research like that reported in the “How,” “Where,” and “Who” sections of the following pages, and in the revealing data from eight case studies. We must understand, manage, and even reinvent tourism if it is to provide the highest benefit both to travelers and to the destinations they visit.

The relative authenticity and sustainability of well-handled home sharing can contribute to creating resilient destinations that retain their distinctive characters over the long term.⁴

³ “Beyond Cities”, Airbnb, 2017.

⁴ Airbnb compensated Jonathan Tourtellot for writing the foreword for this report and for advising on the report's contents.

Introduction

“All great literature is one of two stories,” the saying goes. “A man goes on a journey or a stranger comes to town.” Travel inspires the stories that are worth retelling. Our journeys to new places and connections to new people comprise the meaningful moments worth writing about.

An equally important implication is that each travel story inspires two perspectives: that of the traveler and that of the destination. As Jonathan Tourtellot writes, travel can significantly help or harm a destination. Similarly, destinations have the potential to inspire and educate. In an ecosystem of healthy travel, the benefits flow in both directions.

In recent years, however, the unintended consequences of the global travel industry’s astonishing growth have inspired a dialogue about the tension between travelers and the places they visit. Questioning, exploring, and easing this tension have become more important than ever, especially in light of new technologies and innovation in the travel sector. New technologies have the potential to speed up processes that are detrimental to destinations; alternatively, technology may unlock new, healthy models for how travelers interact with destinations.

This report studies these phenomena. We focus on the rise of the sharing economy and explore the effects of Airbnb on traveler-destination interactions. We present new global data on the ways in which Airbnb guests travel and the flow of benefits through a destination. Then, we present local data from eight destinations, each in the midst of questioning its relationship with travel and tourism. We find that:

Airbnb travelers engage with destinations through a more diverse set of activities than travelers who stay in traditional accommodations. TRAVELSAT survey data for three globally popular destinations shows that Airbnb guests are more likely to engage in a variety of artistic, athletic and social activities. At the end of the trip, Airbnb guests are 11 to 28 percent more likely to express a desire to visit the destination again.⁵

Airbnb travel largely takes place outside of traditional tourist districts. In each of our eight local case studies, at least two-thirds of all guest arrivals take place outside of traditional tourist areas. Across all eight, between 71 and 91 percent of host-recommended places and activities are located outside of traditional tourism areas. Moreover, 31 to 96 percent of Airbnb Experiences are hosted beyond well-worn tourist neighborhoods.

Airbnb hosts educate travelers through local, unique recommendations. Half of all host recommendations are within a 20-minute walk of the host’s listing. Moreover, 61 percent of recommendations are only recommended by a single host, resulting in over 1 million unique recommendations currently provided by Airbnb hosts.

The vast majority of each dollar spent on Airbnb flows directly to hosts. Hosts then spend and reinvest their earnings in a number of ways. Of each euro or dollar or yen or yuan spent on Airbnb, a host spends 35 cents to cover rent or mortgage and household expenses, 13 cents on home improvement, 5 cents to supplement savings, and 4 cents to invest in education, health care, or starting a new business. Relative to chain hotels, a smaller percentage of home sharing spending is paid in fees. As we show throughout our eight case studies, these cents add up.

Taken together, the results illustrate why we at Airbnb are optimistic about the future of healthy travel.

⁵ TRAVELSAT Survey Data for three destinations: Amsterdam, Barcelona, and Japan, collected and compiled by TCI Research.

Airbnb is changing how people travel

Travelers want authentic experiences, but these experiences are not always easy to discover through traditional channels. In a comprehensive survey of Airbnb guests, we found that a desire to integrate with local places and people while traveling is one of the key factors that brings travelers to the platform in the first place.⁶ Four out of five guests surveyed expressed that the desire to “live like a local” was an important factor in choosing to stay at an Airbnb listing. Three in four guests chose Airbnb because they wanted to explore a particular neighborhood. Nearly half of surveyed guests expressed that they chose Airbnb in part because they wanted to meet new people while traveling.

79%

Of Airbnb guests stated that the desire to “live like a local” was important in their choice to book through Airbnb

75%

Of Airbnb guests stated that the desire to visit a particular neighborhood was important in their choice to book through Airbnb

49%

Of Airbnb guests stated that the desire to meet new people was important in their choice to book through Airbnb

When asked to elaborate, one survey respondent who had recently taken a trip to the Netherlands wrote:

“Airbnb [...] has allowed me to travel the way I like to. Staying in tourist zones just teaches you about tourism... living in an authentic local neighborhood allows one to experience a new lifestyle, use local vendors, try local foods, see LIFE.”

– Tasha, San Diego

TRAVELSAT, the UNWTO-awarded global standard for measuring and benchmarking visitor experience, shows that Tasha is not alone. Survey data for three leading global travel destinations, Amsterdam, Barcelona, and Japan, shows that Airbnb guests engage in a more diverse array of activities while traveling.

Figure 1 shows the percent difference between Airbnb and hotel guests who engage in a particular type of activity during their travel to the three destinations. Positive values indicate that Airbnb guests are more likely to participate.

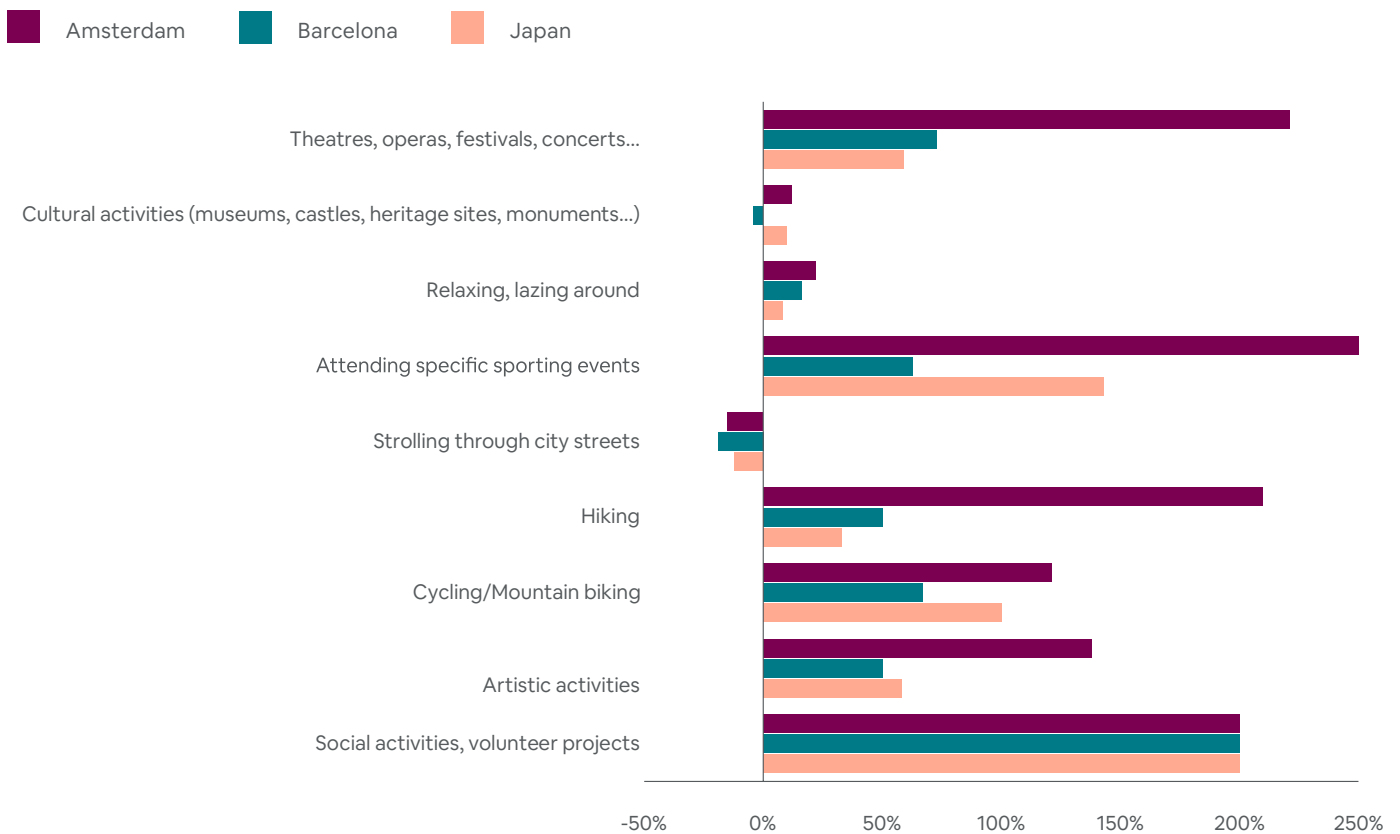


Figure 1: Traveler Activities (% Difference for Airbnb Guests vs. Hotel Guests), Source: TRAVELSAT.

In Amsterdam, Airbnb guests engage in more local activities across the board. The average hotel guest regularly participated in 3.6 activity categories, while the average Airbnb guest listed 4.7. In particular, Airbnb guests were over 200 percent more likely to regularly visit theatrical or musical performances, over 200 percent more likely to attend specific sporting events, and 200 percent more likely to engage in social activities or volunteer projects. Airbnb travelers were also statistically significantly more likely to engage in physical activities such as hiking or cycling.

The responses for Barcelona travelers tell a similar story. Airbnb guests are more likely to engage in social activities and volunteer projects than their hotel counterparts in Barcelona, and they are also disproportionately likely to pursue artistic and athletic activities. The result is a more diverse array of travel experiences for Airbnb guests, who engage with the

destination through more activities on average (4.6 compared with 4.0).

The survey data for international visitors to Japan shows the same trend. Airbnb travelers visiting Japan are more likely to engage regularly in active (hiking, cycling, volunteering, etc.) or artistic (theatre, opera, etc.) activities than hotel guests.

Longer stays provide travelers with opportunities to explore the many sides of a destination. The TRAVELSAT survey shows that Airbnb guests in all three studied markets are more likely to stay in the destination for more than one week. Airbnb guests in Amsterdam were more than twice as likely as hotel guests to stay for over a week. In Barcelona and Japan, where longer trips are more common, Airbnb guests were still 50 percent and 35 percent more likely to stay more than seven days, respectively.

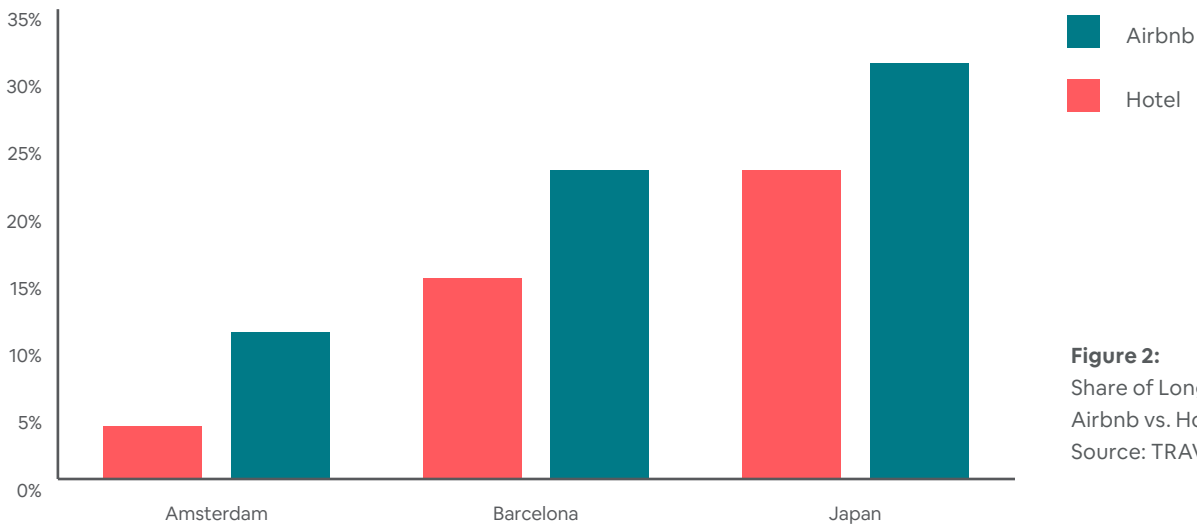


Figure 2: Share of Long Stays (>7 Days) for Airbnb vs. Hotel Guests, Source: TRAVELSAT.

Perhaps the ultimate measure of destination satisfaction, however, is the rate at which travelers want to return. Across all three study markets, Airbnb guests were more likely than hotel guests to express

an intention to repeat their visit to the destination. The difference in all three cases was statistically significant.

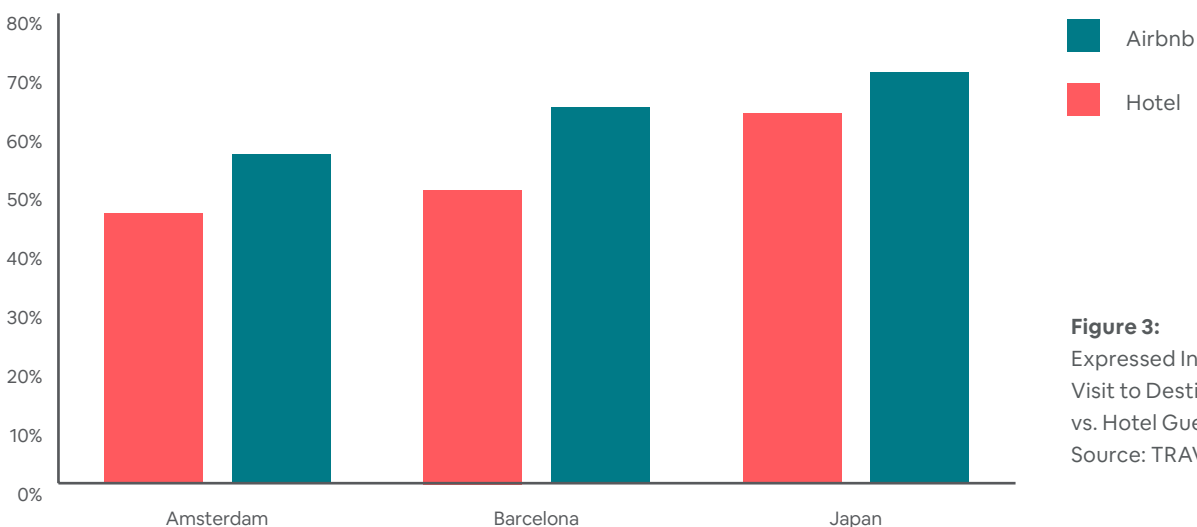


Figure 3: Expressed Intent to Repeat Visit to Destination for Airbnb vs. Hotel Guests, Source: TRAVELSAT.

Airbnb is changing where people travel

We find that Airbnb is not only changing how people travel, but also where they travel, distributing travelers more evenly both within and across destinations. Homes are less concentrated than hotels, so home sharing empowers those who wish to explore new neighborhoods. Across the eight destinations we analyze in this report, 72 to 93 percent of Airbnb listings are outside of at-risk overtourism areas.^{7,8}

Airbnb guest activities are also more dispersed. In each of the eight destination case studies, at least two-thirds of all guest arrivals take place outside of traditional tourist areas. The Airbnb platform encourages this geographic diversity. In these eight markets, between 71 and 91 percent of host guidebook recommendations are located outside of traditional tourism areas. Moreover, anywhere from 31 to 96 percent of Airbnb Experiences are hosted outside of well-worn tourist neighborhoods.

Recent research demonstrates that Airbnb is also increasingly empowering travelers to explore new destinations altogether. Rural travel, for example, offers a promising alternative to well-trodden urban centers. In “Beyond Cities: How Airbnb Supports Rural Revitalization,” we studied 11 rural markets which hosted a cumulative 8.5 million guest arrivals in 2016. Rural hosts in these destinations alone earned over \$1 billion that year. In non-traditional tourist destinations, home sharing allows a community to participate in the growing global tourism industry without needing to develop costly new accommodations that may alter a destination’s landscape.

Any force that distributes travelers more evenly within and across destinations is a welcome relief for those concerned about overtourism. A recent report by McKinsey and the World Travel & Tourism Council on overcrowding explicitly calls for policies that “[s]pread visitors across sites, for example, by developing new attractions and promoting less-popular sites and areas.”⁹ Airbnb by design does exactly that. If the growing global middle class chooses together to visit the same few travel markets at the same time, crowding is inevitable. Home sharing fights this trend, promoting accommodation options across the wide range of destinations that people want to visit.

⁷ We focus on eight destinations in the final section of this report: Amsterdam, Bali, Bangkok, Barcelona, Florence, Kyoto, Mallorca, Queenstown, and Venice.

⁸ See each local case study section for a map of the identified overtourism-risk area.

⁹ McKinsey & Company and World Travel and Tourism Council, “Coping with Success: Managing Overcrowding in Tourism Destinations.” Accessed on May 15, 2018.

Airbnb changes who benefits from travel

A lack of crowding, while a step in the right direction, is not sufficient to ensure that travel is healthy and directly benefits the destination. Healthy travel must ensure that the benefits of travel are felt throughout a destination's community. The McKinsey/WTTC report also explicitly points to "alienation of local residents" as a key problem in destination management. A disconnect between the travel sector and the touristed economy is not sustainable, and not all travel spending is created equal.¹⁰ To understand the ways in which the local economy does (or does not) benefit from travelers, we study the path that traveler-spent dollars take once spent on various types of accommodations: Airbnb listings, hotels belonging to major chains or that are franchised, and cruise lines.

Where does the Airbnb dollar go?

Hosts on Airbnb keep up to 97 percent of the posted price of their listing. The remaining 3 percent is paid to Airbnb as a host fee. Guests also pay a service fee based on the posted price, as well as a cleaning fee, which the host may use to pay for local cleaners or reimburse their own time spent maintaining their space for visitors.

Taken together, from the traveler's point of view, 13 cents on each accommodation dollar go to Airbnb, and the remaining 87 cents go directly to the host, perhaps to be shared with cleaners employed locally by the host.^{11,12}

If that same traveler were to, instead, book a major chain hotel through an online travel agency (OTA), anywhere between 14 and 35 cents would be paid out in franchise fees, management fees, and OTA commissions before the remainder can even reach the hotel management's budget. The hotel management company itself may or may not be located in the local economy. As we discuss below, hotel dollars take a variety of different paths depending on the hotel's ownership, management structure, and if applicable, OTA fees. Perhaps not surprisingly, the same dollar spent on cruise ship accommodations struggles to reach the destination's economy at all.

¹⁰ In fact, a large amount of literature in tourism economics explores the measurement of travel spending "leakage." That is, what share of travel spending remains in the destination country?

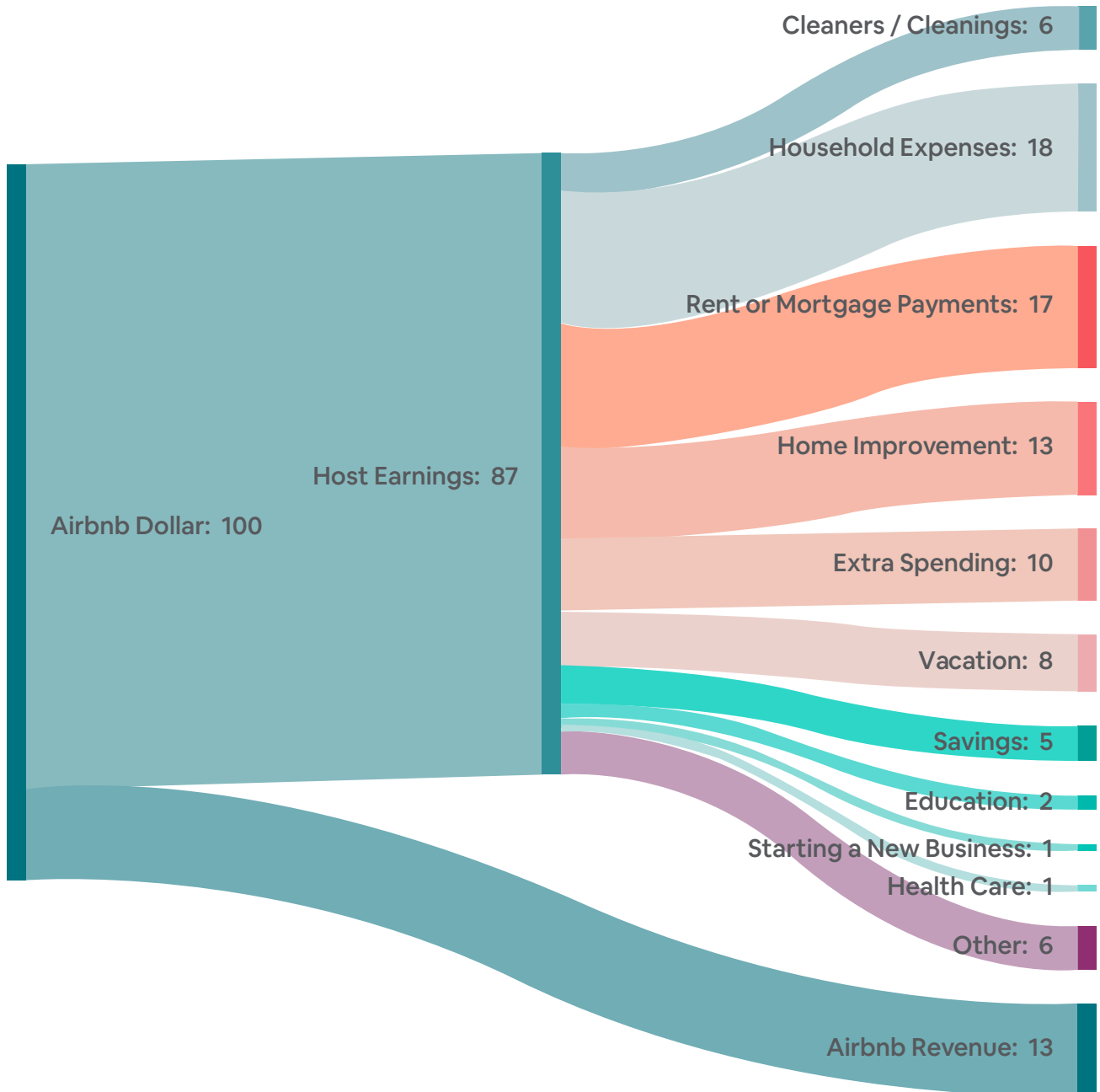
¹¹ The "dollar spent on an Airbnb accommodation" includes guest service fees. It does not include local tourism taxes, which vary across geographies.

¹² It is possible that hosts employ other local services in the process of managing their listing.

After the Airbnb host nets the 87 cents, what happens next? Six cents reimburse cleaning fees.¹³ Hosts then spend an average of 35 cents covering their household expenses and rent or mortgage payments. Survey evidence shows that this income supplement is significant. Over half of all surveyed Airbnb hosts state that their income supplement helped them afford to stay in their homes.

Hosts spend 13 cents of each traveler dollar on home improvement and renovation. This statistic implies

that Airbnb travel actually can improve the physical housing stock of neighborhoods as hosts reinvest traveler dollars back into their homes. Hosts invest their Airbnb earnings in other key ways, as well. Hosts keep 5 cents on each dollar for their personal savings. Two cents flow to education investments, 1 cent pays for health care, and a little over 1 cent on average is used to support hosts starting new businesses. The remaining 21 cents are spent on other goods and vacations that enable hosts themselves to travel.



¹³ Cleaning fee and Airbnb host and guest fee shares are guest spending weighted averages over all completed reservations with a check-in date in the 2017 calendar year.

Where does the big chain-hotel dollar go?

The path taken by a dollar spent on a multinational or otherwise large hotel chain is not as straightforward. For one, the path of a dollar spent depends on how the hotel was booked. When a hotel is booked through an online travel agency (OTA) or aggregator, anywhere from 10 to 25 cents of the dollar spent flows to the OTA, before even reaching the hotel itself.¹⁴ According to a recent Skift report, hotels affiliated with a global brand are often able to negotiate commission rates at the lower end of the range, leaving smaller and boutique hotels to pay the relatively higher rates.

Next, the remaining 75 to 90 cents reach the hotel, which in most cases must instantly pay a management

fee or a franchise fee to the company that affiliated the brand. The largest hotel chains no longer own or operate the majority of their properties, but instead collect franchise fees for use of their brand or management fees in exchange for management resources.¹⁵ According to Skift, the typical franchise fee costs another 11 cents of the traveler's dollar.¹⁶ Management fees take a cut out of gross revenue and gross operating profits, totaling an estimated 4 to 10 cents of each traveler dollar.¹⁷ At the end of the day, this implies that anywhere between 14 to 36 cents of each chain travel dollar may not ever reach the actual destination community.

Where does the cruise dollar go?

Cruise line accommodations are the worst offenders in this exercise. In Venice, for example, there were over 1.4 million cruise passenger arrivals in 2017.¹⁸ For each dollar spent on a night of cruise ship accommodations:^{19,20}

- Ship costs and fuel equal 29 cents
- Booking agent commissions equal 15 cents
- Cruise line profits equal 14 cents
- Corporate operating costs equal 13 cents
- Ship crew wages equal 13 cents
- On-board food and entertainment expenses equal 12 cents
- Transportation costs equal 4 cents

The only relevant fraction of the cruise line dollar that may potentially benefit the port destination communities are fuel costs and local transportation costs to shuttle day-trippers from the port to a limited number of sites. Unless the cruise liner or members of the ship crew happen to be based in the destination in question, the vast majority of the cruise line accommodation dollar does not benefit the destination economy or community.

¹⁴ Stone, Rebecca and Skift Research "A Deep Dive Into Operating & Branding Strategies for Hotel Owners," Exhibit 17, February 2018.

¹⁵ According to Skift Research, 80 percent of major brands' hotels in the US are franchised, while another 19 percent are managed. Only 1 percent of US brand hotels are owned or leased by the parent brand company. In the rest of the world, management arrangements are more common. 55 percent of name brand hotels in non-US markets are managed, while 31 percent are franchised. Marriott, which has the most rooms of any hotel chain in the world, reported in its 2017 10-K that 55 percent of Marriott rooms were subject to franchise agreements and 43 percent were operated under management agreements.

¹⁶ The US Hotel Franchise Fee Guide reports a similar average franchise fee estimate of 10.8 percent.

¹⁷ Skift research estimates that management fees comprise 2 to 4 percent of gross revenue and 10 to 30 percent of gross operating profit. The Smith Travel Research "Moving Forward" Report documented gross operating profit rates of 20 to 47 percent across thirteen top European markets. Conservatively assuming a 20 percent gross operating profit, a high end of 4 percent of gross revenue and 30 percent of gross operating profit equals a total of 10 percent in management fees, which is roughly in line with Skift's reported typical franchise fee.

¹⁸ Cruise industry data from [Statista](#), sourced from Risposte Turismo.

¹⁹ We exclude interest, taxes, and depreciation.

²⁰ Cruise Market Watch, "Financial Breakdown of a Typical Cruiser." Accessed: May 15, 2018.

Airbnb travel is powered by hosts

What is the mechanism that enables this diverse and dispersed travel experience? We believe that Airbnb hosts are empowering authentic and inclusive travel directly, and to test this hypothesis, we analyze the nature and spatial distribution of host recommendations. Airbnb hosts can create guidebooks that teach guests about their hometowns and neighborhoods, and guests can rely on these recommendations to enhance their experience. This local knowledge sharing may be one mechanism through which guests' demonstrated desire to "live like a local" is realized. In fact, whether through the guidebooks product or not, 99 percent of surveyed hosts globally stated that they gave their guests local recommendations. What are these hosts recommending, and where?

99%

**Of Airbnb hosts offer local
recommendations to their guests**

78%

**Of Airbnb hosts offer recommendations
for cultural activities**

89%

**Of Airbnb hosts offer recommendations
for restaurants and cafes**

A global analysis of over 2.8 million host guidebooks reveals that host recommendations are both local and unique. The median guidebook recommendation location is a 20-minute walk from the host's listing. Two-thirds of recommended places to eat were within the same radius. Similarly, 50 percent of cultural activities recommended globally are within a 20-minute walk. With many of Airbnb's listings located outside traditional tourism zones — over 82% across the eight major tourism destinations analyzed — guests are able to experience their hosts' favorite spots locally and conveniently.

50%

Of hosts' overall recommendations are within a 20-minute walk of their listing

67%

Of hosts' recommendations for places to eat are within a 20-minute walk of their listing

50%

Of hosts' recommendations for cultural activities are within a 20-minute walk of their listing

In the absence of local residents' suggestions, travelers tend to rely on smaller, widely clicked-on sets of published "top-10/must-see" lists or aggregated reviews of other travelers. The unfortunate consequence is that these alternatives direct travelers to a small set of places within a destination. In the worst case, once a traveler arrives to this "must see" site, all she can see are other travelers.

Host guidebooks on Airbnb are diverse because locals' interests are diverse. In fact, 61 percent of host guidebook recommendations globally are only recommended by one host, meaning only the guests of that host are being directed to that location or activity through Airbnb. Globally, this implies that today, one can find over 1 million individual-host guidebook recommendations that no other host recommends.

61%

Guidebook recommendations only recommended by one host

1 million+

Unique guidebook recommendations only recommended by one host

An important underlying cause of mass travel concerns is the fact that traditional traveler activities lack diversity. It stands to reason that if travelers learn about destinations only from prior tourists, this cycle will continue to bring more and more tourists to the same few places. Local residents within a destination, on the other hand, vary greatly in their interests and experiences. If the destination's community can guide travelers, then travel will by design become more dispersed and better integrated into the local economy.

Local case studies

While the global statistics tell a holistic story, we recognize that no two destinations are alike. In the following sections, we zoom in on Airbnb activity in eight prominent destinations around the world: Amsterdam, Barcelona, Venice, Mallorca, Bangkok, Bali, Kyoto and Queenstown.



Amsterdam

Amsterdam is mostly known for its romantic canals and beautiful museums with paintings by Van Gogh and Rembrandt, not for its extraordinary districts around the city centre that locals love. Tourists typically stay around the canals and visit Dam Square and Leidseplein, two areas full of chain stores and restaurants that Amsterdam residents rarely frequent. Thanks to hosts on Airbnb, visitors finally can reside outside the crowded city centre and behave like locals, while boosting local businesses off the typical tourist paths.

7.8

Total overnight guests per resident in 2017²¹

0.9

Total Airbnb guest arrivals per resident in 2017²²

12%

Overnight guests who visited Amsterdam through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Amsterdam.

2.5 guests

Average Airbnb booking size

3.3 nights

Average trip length

4.8 stars

Average guest rating (out of 5)

150+

Total guest countries of origin

Tourism benefits the local economy, as guests spend within communities during their stays.

€128M

Guest spending in restaurants

€33M

Guest spending on groceries

€72M

Guest spending on local shopping

€70M

Guest spending on cultural activities

€28M

Guest spending on leisure activities

€38M

Guest spending on local transportation

²¹ Guest arrival data from [Top 100 City Destinations Ranking](#), Euromonitor, 2017 (6,570,400). Population data from [Statista](#), sourced from Centraal Bureau voor de Statistiek 2017 (844,974).

²² Based on 2017 Airbnb guest arrivals (780,000), 2017 resident population.

When guests stay at an Airbnb listing in Amsterdam, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Amsterdam, these local recommendations help guests get to know off-the-beaten-path areas.

12 minutes

Median walking time from a listing to a guidebook-recommended location²³

8 minutes

Time to recommended restaurants

5 minutes

Time to recommended grocery stores

3 minutes

Time to recommended shops

GUEST QUOTE

“Staying in a residential area and getting help and advice from our hosts gave our trip a local feel. It was really nice to be far from the chaos of the tourist attractions and hotels. We enjoyed the local shopping, amazing restaurants, and bars in our neighborhood. We couldn't have done it without Airbnb!”

– Airbnb guest to Amsterdam

The Airbnb model also ensures that accommodation spending benefits the local economy, as hosts spend their earnings within their community.

€19M

Host earnings spent on home improvement

€4M

Host earnings spent on starting a new business

6,700

Hosts who use their Airbnb income to help stay in their home

HOST QUOTE

“I use most of my [Airbnb hosting] income to finish renovating the house we live in. Once this is done, the money will be used to pay off the mortgage. If I rent while I'm on vacation, I consider this extra vacation budget.”

– Airbnb host in Amsterdam

²³ Assuming 20 minutes to walk one mile, or about 1.6 kilometers, at an easy walking pace.

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

78%

Home guest arrivals
outside of traditional
tourism areas

50%

Experience guest arrivals
outside of traditional
tourism areas

80%

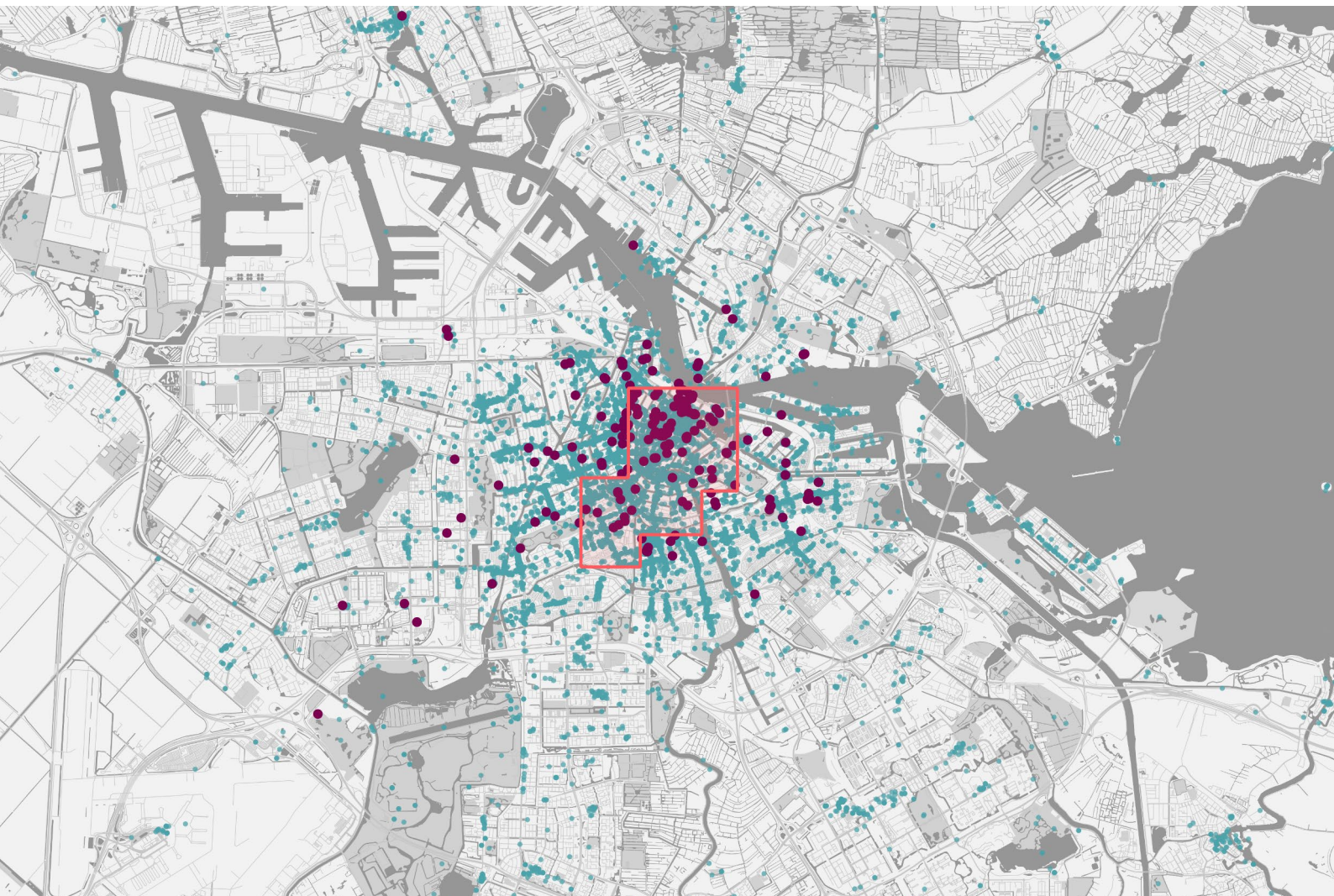
Host guidebook
recommendations outside
of traditional tourism areas

Airbnb activity in Amsterdam

 Airbnb Host Guidebook recommendations

 Airbnb Experiences

 Traditional tourism areas



Barcelona

Barcelona is the city of Gaudí, Las Ramblas and FC Barcelona. For many, that's just about it. Most travelers tend to stay around Plaça Catalunya and visit La Boquería market, where residents no longer shop, or go to the Sagrada Família, where souvenir shops have replaced greengrocers and other traditional businesses. But thanks to their local knowledge, hosts on Airbnb are sending their guests to less visited locations, away from the tourist traps of the city.

4.7

Total overnight guests per resident in 2017²⁴

0.9

Total Airbnb guest arrivals per resident in 2017²⁵

18%

Overnight guests who visited Barcelona through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Barcelona.

2.6 guests

Average Airbnb booking size

4.5 nights

Average trip length

4.8 stars

Average guest rating (out of 5)

150+

Total guest countries of origin

Tourism benefits the local economy, as guests spend within communities during their stays.

€282M

Guest spending in restaurants

€89M

Guest spending on groceries

€147M

Guest spending on local shopping

€144M

Guest spending on cultural activities

€58M

Guest spending on leisure activities

€87M

Guest spending on local transportation

²⁴ Guest arrival data from Top 100 City Destinations Ranking, Euromonitor, 2017 (7,624,100). Population data from Open Data BCN 2017 (1,625,137).

²⁵ Based on 2017 Airbnb guest arrivals (1,377,000), 2017 resident population.

When guests stay at an Airbnb listing in Barcelona, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Barcelona, these local recommendations help guests get to know off-the-beaten-path destinations.

11 minutes

Median walking time from a listing to a guidebook-recommended location²⁶

7 minutes

Time to recommended restaurants

3 minutes

Time to recommended grocery stores

9 minutes

Time to recommended stores

GUEST QUOTE

“[Airbnb] is an affordable way to live with the locals and experience locations authentically ... The hosts are almost more fun to experience than the places because they are so friendly and helpful. I wouldn't travel any other way. In fact, I currently have 61 wish lists, which include almost 40 places that I've already traveled to!

– Airbnb guest to Barcelona

The Airbnb model also ensures that accommodation spending benefits the local economy, as hosts spend their earnings within their community.

€21M

Host earnings spent on home improvement

€5M

Host earnings spent on starting a new business

9,500

Hosts who use their Airbnb income to help stay in their home

HOST QUOTE

“It is a pleasure to receive people at home and to explain the things that I like about the city. I like to be able to speak and listen to life stories of other people, people's countries. It gives me life to receive people at home, and I am very grateful to be able to do it, and to see that the people that come are satisfied with what I offer them.

– Airbnb host in Barcelona

²⁶ Assuming 20 minutes to walk one mile, or about 1.6 kilometers, at an easy walking pace.

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

84%

Home guest arrivals
outside of traditional
tourism areas

82%

Experience guest arrivals
outside of traditional
tourism areas


90%

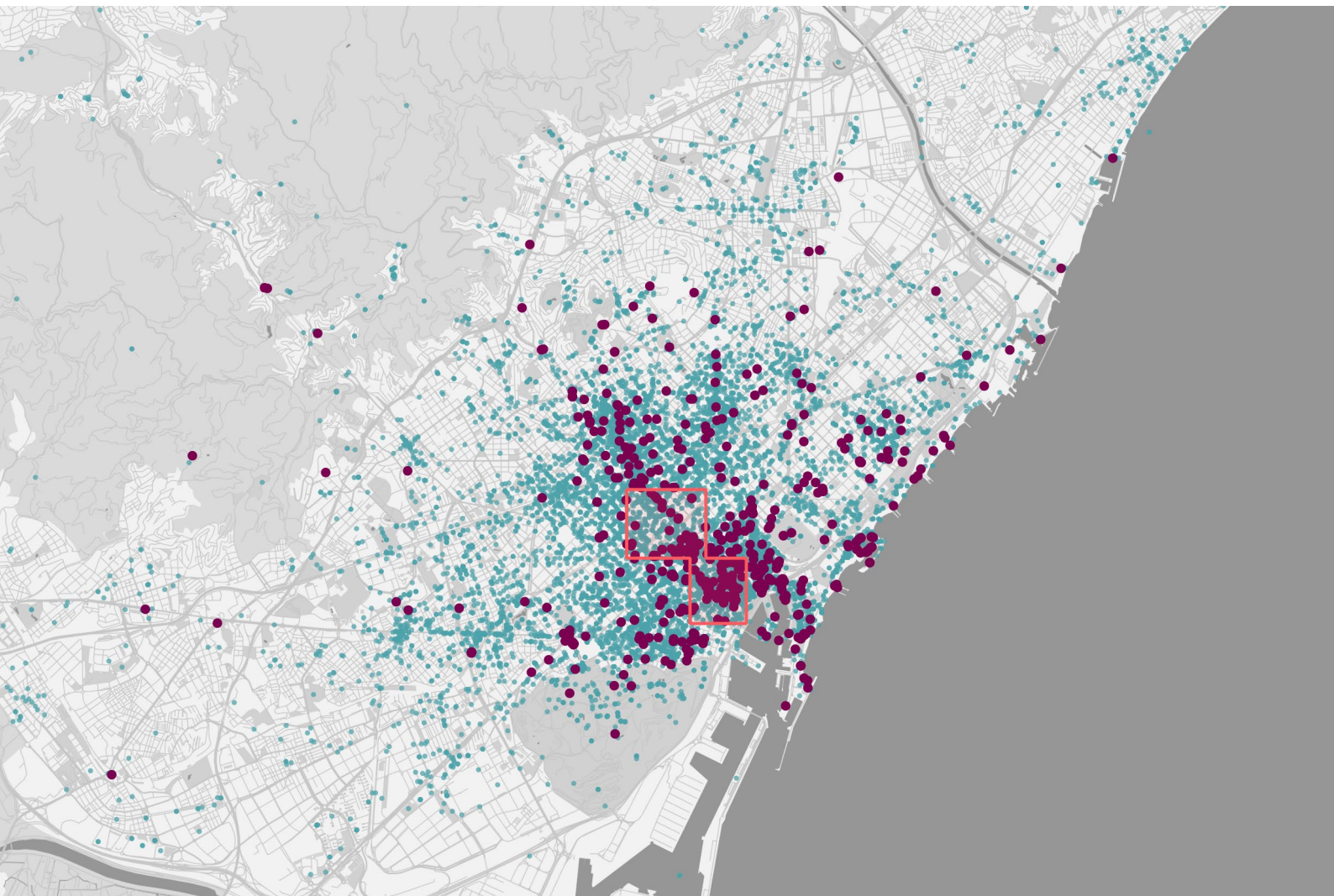
Host guidebook
recommendations outside
of traditional tourism areas

Airbnb activity in Barcelona

 Airbnb Host Guidebook recommendations

 Airbnb Experiences

 Traditional tourism areas



Venice

One of the most iconic destinations worldwide thanks to its narrow canals and unique mix of Gothic and Byzantine architecture, Venice needs no introduction. With a population of 270,000, of which only a mere 50,000 live in the city on the lagoon, Venice attracts over 20 million visitors per year, with day-trippers and cruise passengers queuing to access Rialto Bridge and San Marco Square on hot days before disappearing at sunset, having seen little else and spent mainly at souvenir shops. Crowding has become such an issue that the Mayor has considered limiting access mainly to overnight travelers, with prominent publications listing the city as a place to not visit in 2018. But with Airbnb, local hosts are actively promoting less-trafficked routes and local shops to their overnight guests, helping City Hall in its efforts to attract healthy, sustainable tourism.

73.8

Total day + overnight guests per resident in 2017²⁷

2.2

Total Airbnb guest arrivals per resident in 2017²⁸

3%

Overnight guests who visited Venice through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Venice.

2.7 guests

Average Airbnb booking size

2.8 nights

Average trip length

4.8 stars

Average guest rating (out of 5)

150+

Total guest countries of origin

Tourism benefits the local economy, as guests spend within communities during their stays.

€19M

Guest spending in restaurants

€6M

Guest spending on groceries

€5M

Guest spending on local shopping

€15M

Guest spending on cultural activities

€3M

Guest spending on leisure activities

€6M

Guest spending on local transportation

²⁷ Guest arrival data from World Population Review 2017, includes day trippers as well as overnight guests (20,000,000). Population data also from World Population Review 2017 (270,884).

²⁸ Based on 2017 Airbnb guest arrivals (605,700), 2017 resident population.

When guests stay at an Airbnb listing in Venice, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Venice, these local recommendations help guests get to know off-the-beaten-path destinations.

8 minutes

Median walking time from a listing to a guidebook-recommended location²⁹

6 minutes

Time to recommended restaurants

4 minutes

Time to recommended grocery stores

6 minutes

Time to recommended stores

GUEST QUOTE

“All hosts I've stayed with were super nice and accommodating. They went above and beyond to provide information about the area we were staying in and recommended restaurants, sites and activities.”

– Airbnb guest to Venice

The Airbnb model also ensures that accommodation spending benefits the local economy as hosts spend their earnings within their community.

€2M

Host earnings spent on home improvement

€400K

Host earnings spent on starting a new business

600

Hosts who use their Airbnb income to help stay in their home

HOST QUOTE

“[Hosting on Airbnb] allowed me to renovate part of the home, reducing the environmental impact of consumption and emissions. The rest is used to pay the mortgage, bills and household expenses.”

– Airbnb host in Venice

²⁹ Assuming 20 minutes to walk one mile, or about 1.6 kilometers, at an easy walking pace.

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

72%

Home guest arrivals outside of most popular tourism areas

86%

Experience guest arrivals outside of most popular tourism areas

75%

Host guidebook recommendations outside of most popular tourism areas

Airbnb activity in Venice

 Airbnb Host Guidebook recommendations  Airbnb Experiences  Most popular tourism areas



Mallorca

Mallorca is well-known for its beaches, the Tramuntana and the delicious ensaimadas, but many travelers don't leave the soft sands to discover the areas that locals call home. In 2017, almost 17 million people visited the Balearic Islands, with many of them staying in the island of Mallorca. Most travelers usually stay in the capital city of Palma or go to resort towns where they don't get to experience the local flair. Airbnb hosts are spreading guests across the island, bringing new business to family-run cafes, restaurants and even vineyards.

10.2

Total overnight guests per resident in 2015³⁰

0.5

Total Airbnb guest arrivals per resident in 2017³¹

5%

Overnight guests who visited Mallorca through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Mallorca.

3.0 guests

Average Airbnb booking size

5.6 nights

Average trip length

4.8 stars

Average guest rating (out of 5)

140+

Total guest countries of origin

Tourism benefits the local economy, as guests spend within communities during their stays.

€130M

Guest spending in restaurants

€60M

Guest spending on groceries

€50M

Guest spending on local shopping

€40M

Guest spending on cultural activities

€20M

Guest spending on leisure activities

€60M

Guest spending on local transportation

³⁰ Guest arrival data from IBESTaT 2015 (8,806,950). Population data from Ministerio de Economía y Competitividad 2015 (859,289).

³¹ Based on 2017 Airbnb guest arrivals, 2015 resident population (433,900).

When guests stay at an Airbnb listing in Mallorca, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Mallorca, these local recommendations help guests get to know off-the-beaten-path destinations.

4,000+ locations

Mallorca recommendations
in Airbnb guidebooks

20 minutes

Time to recommended
restaurants

15 minutes

Time to recommended
grocery stores

28 minutes

Time to recommended stores

GUEST QUOTE

“Airbnb has allowed me to save a lot of money, so I've gotten to see more of the world than I would've. However, my favorite thing about Airbnb is hearing from the hosts and living like a local wherever I am and getting to see the city or town through their eyes.”

– Airbnb guest to Mallorca

The Airbnb model also ensures that accommodation spending benefits the local economy as hosts spend their earnings within their community.

€19M

Host earnings spent
on home improvement

€2M

Host earnings spent on
starting a new business

4,100

Hosts who use their
Airbnb income to help
stay in their home

HOST QUOTE

“Airbnb has allowed us to pay our daughter's studies and also keep the house in good condition. So far the experience has been very positive. We had some great guests!”

– Airbnb host in Mallorca

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

83%

Home guest arrivals
outside of traditional
tourism areas

91%

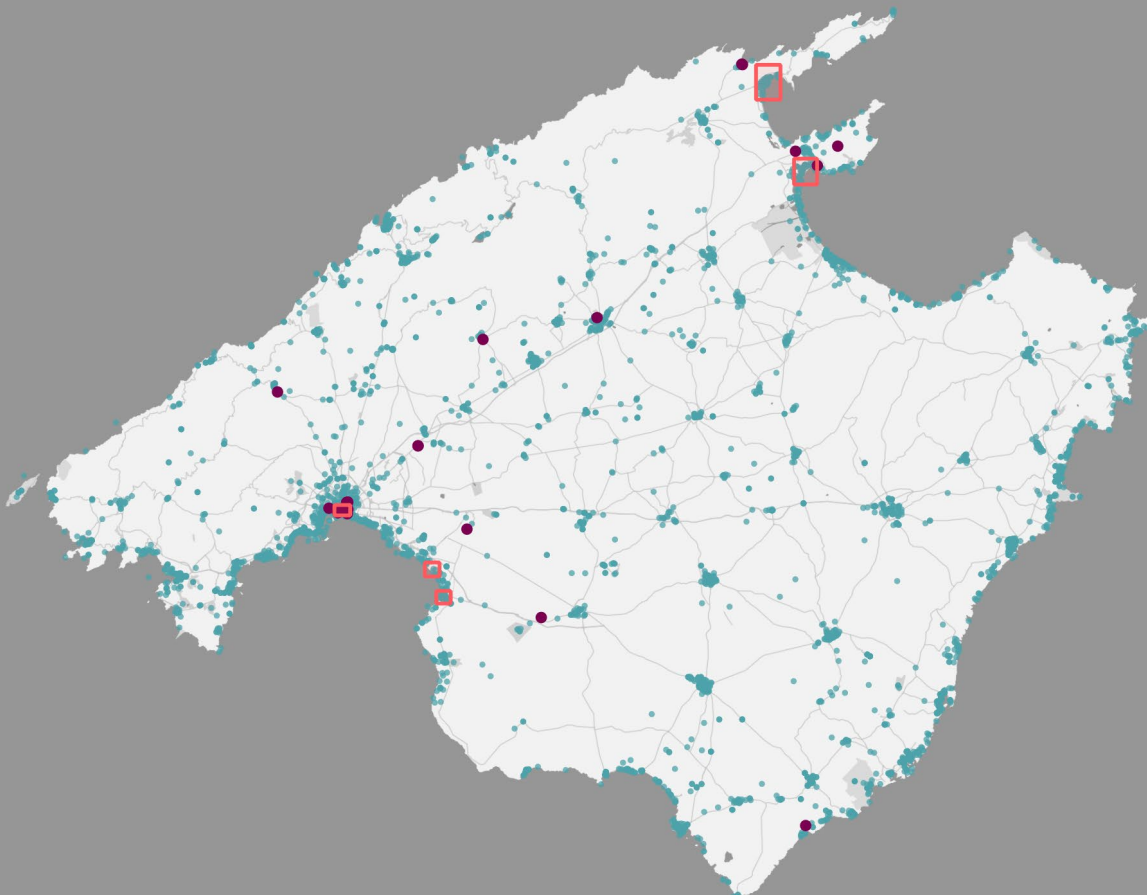
Experience guest arrivals
outside of traditional
tourism areas

90%

Host guidebook
recommendations outside
of traditional tourism areas

Airbnb activity in Mallorca

 Airbnb Host Guidebook recommendations  Airbnb Experiences  Traditional tourism areas



Bali

With its soft, sandy beaches, captivating rice terraces and well-preserved UNESCO Heritage Sites, Bali is Southeast Asia's quintessential tropical paradise. The island has seen a rapid surge in intrepid tourists after comedy-drama Eat, Pray, Love catapulted it into the international limelight. As tourist numbers continue to grow, Airbnb is helping to build accommodation supply and empower passionate local hospitality entrepreneurs who are keen to share some authentic Balinese hospitality.

3.3

Total overnight guests per resident in 2016³²

0.2

Total Airbnb guest arrivals per resident in 2017³³

5%

Overnight guests who visited Bali through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Bali.

2.8 guests

Average Airbnb booking size

4.1 nights

Average trip length

4.9 stars

Average guest rating (out of 5)

150+

Total guest countries of origin

Tourism benefits the local economy, as guests spend within communities during their stays.

Rp 1,011B

Guest spending in restaurants

Rp 200B

Guest spending on groceries

Rp 900B

Guest spending on local shopping

Rp 220B

Guest spending on cultural activities

Rp 350B

Guest spending on leisure activities

Rp 380B

Guest spending on local transportation

³² Guest arrival data from Bali Government Tourism Office (13,571,617), sum of domestic and foreign tourist arrivals, 2016. Population data from Bali Government Tourism Office (4,152,800), Direct Foreign Tourist Arrivals only.

³³ Based on 2017 Airbnb guest arrivals (630,000), 2016 resident population.

When guests stay at an Airbnb listing in Bali, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Bali, these recommendations help guests get to know off-the-beaten-path destinations.

21 minutes

Median walking time from a listing to a guidebook-recommended location³⁴

15 minutes

Time to recommended restaurants

14 minutes

Time to recommended grocery stores

18 minutes

Time to recommended stores

GUEST QUOTE

“I've been able to see the places I've visited through my hosts' eyes. I would've never found the \$10 sandwich special at Robert's Western World in Nashville, or the coffee at Ten Belles in Paris, or the amazing hidden rice fields in Ubud if it wasn't for the hosts.

– Airbnb guest to Bali

The Airbnb model also ensures that accommodation spending benefits the local economy as hosts spend their earnings within their community.

Rp 160B

Host earnings spent on home improvement

Rp 16B

Host earnings spent on starting a new business

2,500

Hosts who use their Airbnb income to help stay in their home

HOST QUOTE

“A lot of the money we earn from hosting goes back into our villa, such as maintenance and staff bonuses. Anything left over we save to travel.

– Airbnb host in Bali

³⁴ Assuming 20 minutes to walk one mile, or about 1.6 kilometers, at an easy walking pace.

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

67%

Home guest arrivals
outside of traditional
tourism areas

79%

Experience guest arrivals
outside of traditional
tourism areas

71%

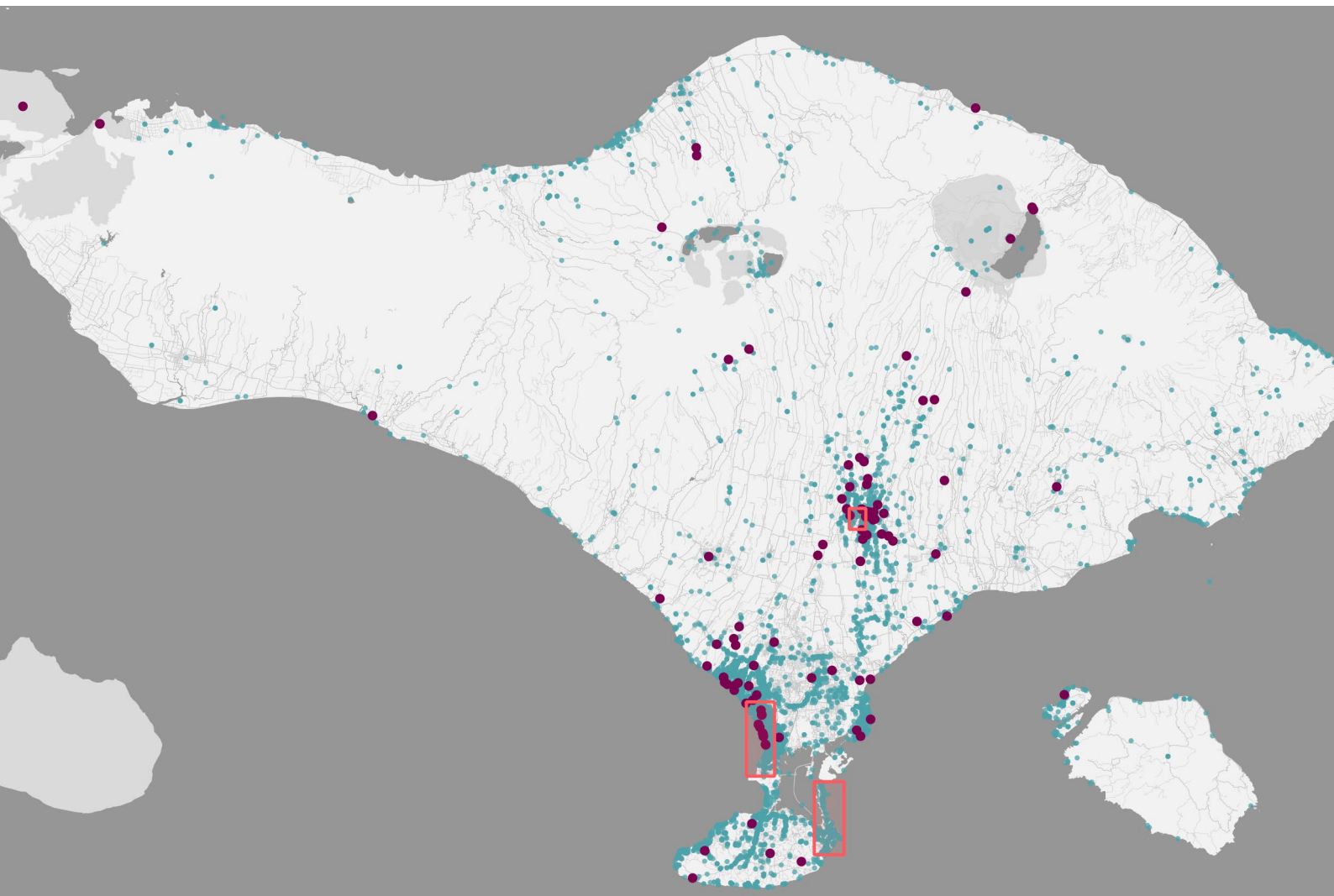
Host guidebook
recommendations outside
of traditional tourism areas

Airbnb activity in Bali

 Airbnb Host Guidebook recommendations

 Airbnb Experiences

 Traditional tourism areas



Bangkok

Bangkok is at once both glamorous and gritty, cosmopolitan and countryside. Travelers are drawn to the city's gastronomic delights, exciting nightlife, looping market mazes and lush jungles just a stone's throw from the Chao Phraya River. As tourist numbers grow rapidly, Airbnb is helping to diversify tourism with listings in local neighborhoods and authentic Experiences such as [Thanwarat's Hands on Royal Thai Recipe](#) cooking class.

2.8

Total overnight guests per resident in 2017³⁵

0.2

Total Airbnb guest arrivals per resident in 2017³⁶

5%

Overnight guests who visited Bangkok through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Bangkok.

2.5 guests

Average Airbnb booking size

4.3 nights

Average trip length

4.9 stars

Average guest rating (out of 5)

150+

Total guest countries of origin

Tourism benefits the local economy, as guests spend within communities during their stays.

฿1.7B

Guest spending in restaurants

฿800M

Guest spending on groceries

฿1.4B

Guest spending on local shopping

฿710M

Guest spending on cultural activities

฿790M

Guest spending on leisure activities

฿800M

Guest spending on local transportation

³⁵ Guest arrival data from Top 100 City Destinations Ranking, Euromonitor, 2017 (23,270,600). Population data from Thai National Statistical Office, 2010 Population and Housing Census (8,300,000).

³⁶ Based on 2017 Airbnb guest arrivals (1,220,000), 2010 resident population.

When guests stay at an Airbnb listing in Bangkok, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Bangkok, these local recommendations help guests get to know off-the-beaten-path destinations.

19 minutes

Median walking time from a listing to a guidebook-recommended location³⁷

9 minutes

Time to recommended restaurants

6 minutes

Time to recommended grocery stores

26 minutes

Time to recommended stores

GUEST QUOTE

“The Airbnb experience always gives me that off-the-beaten-path feeling. It’s fantastic for the starry-eyed wanderer who wants to set their own destination.”

– Airbnb guest to Bangkok

The Airbnb model also ensures that accommodation spending benefit the local economy, as hosts spend their earnings within community.

\$100M

Host earnings spent on home improvement

\$75M

Host earnings spent on starting a new business

2,000

Hosts who use their Airbnb income to help stay in their home

HOST QUOTE

“Hosting on Airbnb is like opening your doors to new opportunities. Opportunities to meet new people and become friends. Opportunity to expand your business network. Opportunities to know other cultures from different countries... and so on. It becomes an endless source of opportunities. I will continue to be a host as long as I live.”

– Airbnb host in Bangkok

³⁷ Assuming 20 minutes to walk one mile, or about 1.6 kilometers, at an easy walking pace.

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

88%

Home guest arrivals
outside of traditional
tourism areas

99%

Experience guest arrivals
outside of traditional
tourism areas

91%

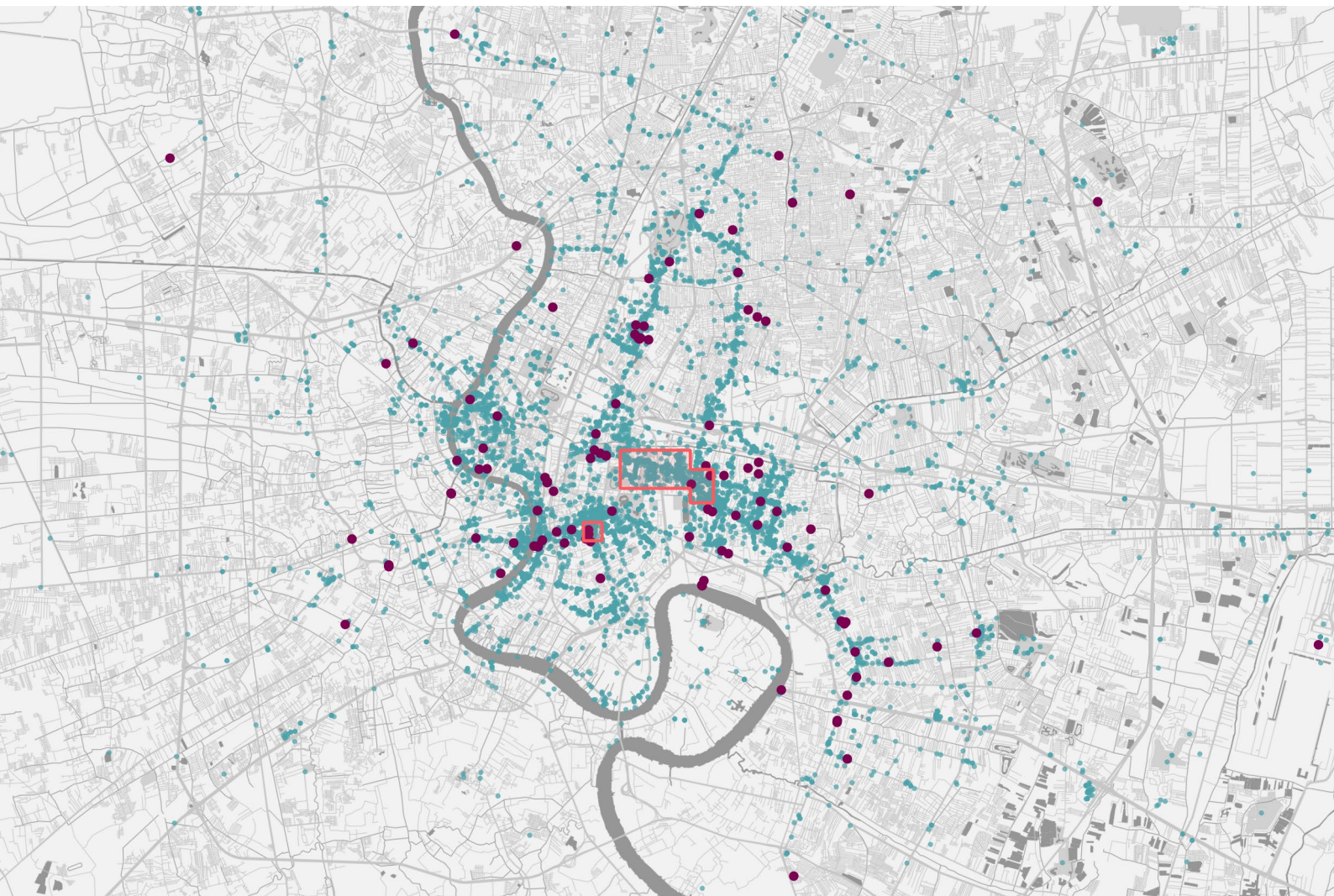
Host guidebook
recommendations outside
of traditional tourism areas

Airbnb activity in Bangkok

 Airbnb Host Guidebook recommendations

 Airbnb Experiences

 Traditional tourism areas



Kyoto

Kyoto, Japan's ancient capital, is an alluring blend of diverse cultures and history dating back more than 1,200 years. In 2017 alone, the city's 14 UNESCO World Heritage Sites and 2,000 shrines and temples attracted more than 55 million tourists from across Japan and around the world. Most of Kyoto's historical sites are clustered around the Imperial Palace in the urban district, which makes the city very dense on a daily basis. Through initiatives such as the [Yoshino Cedar House](#), Airbnb is supporting rural regeneration and inspiring tourists to stay in, and explore local neighbourhoods.

2.1

Total overnight guests per resident in 2017³⁸

0.5

Total Airbnb guest arrivals per resident in 2017³⁹

22%

Overnight guests who visited Kyoto through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Kyoto.

2.8 guests

Average Airbnb booking size

3.1 nights

Average trip length

4.9 stars

Average guest rating (out of 5)

150+

Total guest countries of origin

Tourism benefits the local economy, as guests spend within communities during their stays.

¥13B

Guest spending in restaurants

¥3B

Guest spending on groceries

¥18B

Guest spending on local shopping

¥4.1B

Guest spending on cultural activities

¥2B

Guest spending on leisure activities

¥10B

Guest spending on local transportation

³⁸ Guest arrival data from Top 100 City Destinations Ranking, Euromonitor, 2017 (3,029,600). Population data from Kyoto City Statistical Portal 2017 population estimate (1,472,027).

³⁹ Based on 2017 Airbnb guest arrivals (670,000), 2017 resident population estimate.

When guests stay at an Airbnb listing in Kyoto, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Kyoto, these local recommendations help guests get to know off-the-beaten-path destinations.

14 minutes

Median walking time from a listing to a guidebook recommendation location⁴⁰

5 minutes

Time to recommended restaurants

4 minutes

Time to recommended grocery stores

7 minutes

Time to recommended stores

GUEST QUOTE

“We loved our visit to a ‘tiny house’ off the grid in the Japan countryside. Our host picked us up at the train station and took us to a community farmer's market and grocery store before taking us to our Airbnb. We loved our time there.

– Airbnb guest to Kyoto

The Airbnb model also ensures that accommodation spending benefits the local economy as hosts spend their earnings within the community.

¥820M

Host earnings spent on home improvement

¥520M

Host earnings spent on starting a new business

1,500

Hosts who use their Airbnb income to help stay in their home

HOST QUOTE

“Hosting has opened up the world to me. I have made friends and had the opportunity to learn languages and foreign cultures. I am grateful.”

– Airbnb host in Kyoto

⁴⁰ Assuming 20 minutes to walk one mile, or about 1.6 kilometers, at an easy walking pace.

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

76%

Home guest arrivals
outside of traditional
tourism areas

78%

Experience guest arrivals
outside of traditional
tourism areas

72%

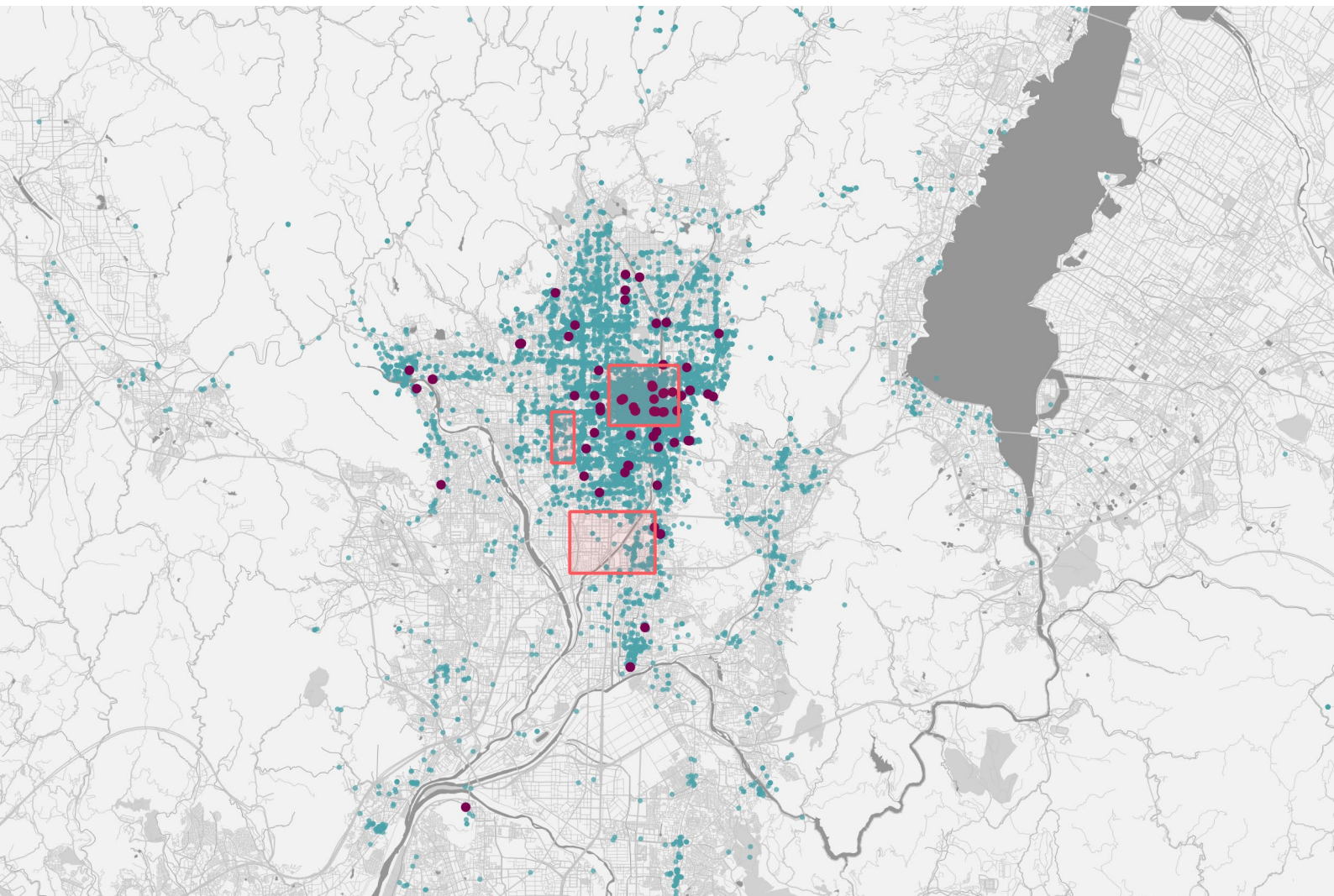
Host guidebook
recommendations outside
of traditional tourism areas

Airbnb activity in Kyoto

 Airbnb Host Guidebook recommendations

 Airbnb Experiences

 Traditional tourism areas



Queenstown

From skiing perfect powder, hiking the open expanses of the High Country to sampling some of the best wine and produce in the world, Queenstown offers something for every kind of traveler. This diverse and enduring appeal has sustained a tourism boom, as well as created growing pains for the community and locals. Airbnb is helping ease some of the growing pains, including a shortage of accommodations, while more fairly and sustainably spreading the benefits of tourism throughout the community.

51.3

Total overnight guests per resident in 2017⁴¹

5.2

Total Airbnb guest arrivals per resident in 2017⁴²

10%

Overnight guests who visited Queenstown through Airbnb in 2017

Airbnb attracts diverse, high-quality travelers to Queenstown.

2.9 guests

Average Airbnb booking size

3.1 nights

Average trip length

4.9 stars

Average guest rating (out of 5)

100+

Total guest countries of origin

Tourism benefits the local economy as guests spend within communities during their stays.

\$25M

Guest spending in restaurants

\$10M

Guest spending on groceries

\$9M

Guest spending on local shopping

\$10M

Guest spending on cultural activities

\$8M

Guest spending on leisure activities

\$15M

Guest spending on local transportation

⁴¹ Guest arrival data (1,447,383) calculated from Ministry of Business, Innovation & Employment guest night data for 2017 (3,618,458) and average guest length of stay information from Infometrics report (2.5), 2017. Population data from Queenstown-Lakes District 2013 Census population estimate.

⁴² Based on 2017 Airbnb guest arrivals (146,420), 2017 resident population estimate.

When guests stay at an Airbnb listing in Queenstown, more often than not, their hosts share their favorite local recommendations. Because most Airbnb guests stay outside of the traditional tourism zone in Queenstown, these local recommendations help guests get to know off-the-beaten-path destinations.

800+ locations

Queenstown recommendations
in Airbnb guidebooks

25 minutes

Time to recommended
restaurants

17 minutes

Time to recommended
grocery stores

26 minutes

Time to recommended stores

GUEST QUOTE

“When reflecting on our favorite parts of a holiday, it always comes back to an experience, rather than a place, and staying in local accommodation. Airbnb provides the best opportunities for this. [Hosts’] simple and often generous hospitality create a lasting impression that stay with you, long after the scenery has faded.

– Airbnb guest to Queenstown

The Airbnb model also ensures that accommodation spending benefits the local economy as hosts spend their earnings within their community.

\$5M

Host earnings spent on home
improvement

\$8M

Host earnings spent on rent or
mortgage

600

Hosts who use their
Airbnb income to help
stay in their home

HOST QUOTE

“[Hosting on Airbnb] covers the costs associated with our apartment, like body corporate fees, power, WiFi, and [mortgage] rates. The small bit left over is extra spending money.”

– Airbnb host in Queenstown

Thanks to local hosts, Airbnb homestay and Experience guests are spread throughout the area rather than concentrated in areas already known for overtourism.

93%

Guest arrivals
outside of traditional
tourism areas

31%

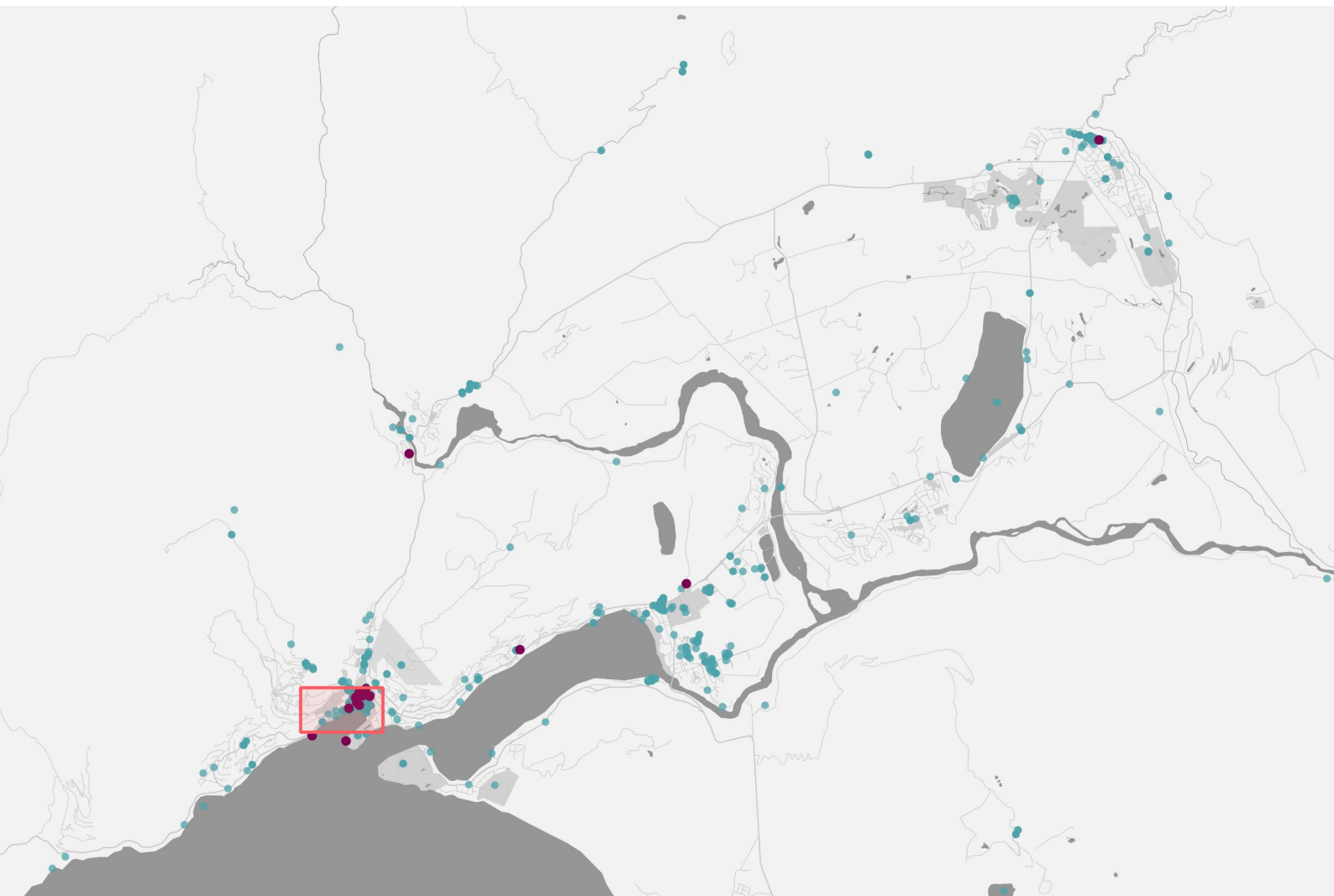
Experience guest arrivals
outside of traditional
tourism areas

75%

Host guidebook
recommendations outside
of traditional tourism areas

Airbnb activity in Queenstown

 Airbnb Host Guidebook recommendations  Airbnb Experiences  Traditional tourism areas





Conclusion

Travel can be enriching or disruptive, transformational or disappointing, healthy or destructive. This “double-edged sword” implies that all stakeholders have a great responsibility to preserve destinations and the character of travel itself. Unfortunately, the mass travel industry has been converging on an equilibrium of concentrated travel, overcrowded destinations, and a disconnect between the broader tourism economy and the local community. As this report describes, home sharing defies, and in some ways is even starting to reverse these trends in several important ways.

The travel industry, however, still has a long way to go. For many, travel is a risky and expensive endeavor. It can be difficult and costly to learn about the best ways to experience destinations, so many aspiring travelers default to safe options, confirmed by “must-see” lists that a few outlets compile for millions to click through.

At its best, technology has the potential to make travel easier and more transformational. To do so, however, we believe that people need to remain at the heart of the travel experience. Hosts are best equipped to educate guests, and communities are best equipped to welcome travelers. If technology can empower people, then travel can continue to create the meaningful moments and even transformational experiences worth writing about, and the stories worth retelling. We are optimistic for this future.

Methodology

Data in the local case studies of this report comes from several sources. Total overnight guests per resident in 2017 and Total Airbnb guest arrivals per resident in 2017 were calculated using externally reported data about local populations and annual tourism volume, as well as internal Airbnb data covering trips between January 1, 2017 and December 31, 2017. Data on Airbnb guest demographics and bookings also reflect activity during calendar year 2017.

Data on how Airbnb guests spend their money and how Airbnb hosts spend their hosting earnings was calculated using the latest annual Airbnb Community Compact guest and host surveys, in which over 80,000 hosts and 40,000 guests participated. Guests who had visited the selected markets in 2017 reported their daytime spending by category, while hosts who had hosted in the selected markets in 2017 reported how they spend their hosting earnings by category. Currency figures are reported in the local currency of the market. Additional topics from the survey, such as why guests choose to book through Airbnb, how hosts interact with their guests and how Airbnb helps hosts afford to stay in their home, appear throughout the report.

Data on Airbnb host guidebooks, a product feature allowing hosts to share their favorite local spots with guests, include all places recommended by hosts with active listings in the selected markets as of May 1, 2018. Distances between listings and recommended places are geodesic distances reported as walking times, where 20 minutes of walking equals 1 mile or about 1.6 kilometers. Data on Airbnb Experiences, which first launched in November 2016 and has expanded to over 100 markets, reflects all-time Experience guest arrivals through May 1, 2018.

