Collaborative economy: estimation of the accommodation sector. Results from the demand approach

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Tourism statistics: supply

- NACE 55.2- Holiday and other short-stay accommodation:
  - Survey frame obtained from tourism registers
  - Regionally managed and regulated
  - Different accommodation typologies: tourist apartments, rural tourism accommodation, youth hostels
  - ‘Tourist Apartments’
    - Apartment blocks: complete buildings
    - Private houses/flats/apartments professionally managed
      - Peer to peer private accommodation: not included in registers... but changing!
  - Slow and **not yet consolidated** changes in legislation: new registers of ‘Tourist dwellings’
Tourism statistics: supply

- Obtaining information from platforms: opportunity but... also a challenge
  - Duplicity among different platforms
  - Overlapping with official registers
  - Suppliers outside the platform environment
  - Statistical unit: establishment vs advertisement (?)

- How can we access the information?
  - Aggregated data delivered by platforms: integration in terms of capacity?
  - Webscrapping: sustainable?
  - Non-residents companies: delocalised data collection

- Spain: pilot study starting now
  - Focusing on capacity: integrating data of the main platforms
  - Exploring occupancy
Tourism statistics: income

- New regulation: persons and entities providing intermediation services should report quarterly on the cession of dwellings for tourism purposes
  - Identification of the owner
  - Identification of the dwelling (address and cadastral number)
  - Number of days of the cession and starting date
  - Amount received by the owner

  optionally
  - Number of contract
  - Date of intermediation
  - Means of payment

- Important information for occupancy
Tourism demand surveys: residents

- Domestic and outbound tourism: Residents Travel Survey
  
  - Monthly and quarterly results on a quarterly basis
  - Monthly estimates are based on a sample of 16,400 questionnaires ≈ 6,000 trips
  - Annual estimates ≈ 106,000 questionnaires ≈ 71,000 trips

<table>
<thead>
<tr>
<th>Residents Travel Survey. Sample size (number of trips). 2017</th>
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<td>Domestic</td>
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<tr>
<td>Market accommodation</td>
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<td>Rented dwelling/room/swapping</td>
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<td>Other market accommodation</td>
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Use of platforms by resident tourists

Q1. What was the main type of accommodation used during the trip?
   - 1. Hotel or 2. Pension, lodge, motel, guest house, inn
   - 3. Rented dwelling or 4. Rented room in private home
   - 5. Rural tourism accommodation or 6. Hostels
   - 7. Camping or 8. Cruise
   - 9. Other rented accommodation

Q2. How did you book the main accommodation?
   - Directly with the establishment (owner if Q1=3, 4, 13) through its web or App
   - Directly with the establishment (owner if Q1=3, 4, 13) in person, by mail or by phone
   - In a travel agency or tour operator (real estate if Q1=3, 4, 13) through its web or App
   - In a travel agency or tour operator (real estate if Q1=3, 4, 13) in person, by mail or by phone
   - Through a specialized web page (e.g., AirBnb, Homeaway, Booking, Homelidays, Niumba, Rentalia, Housetrip, Wimdu, Interhome, Friendly Rentals, etc.) – only if Q1=3, 4 or 13
   - Don’t know
Use of platforms by resident tourists

- Different results for **Domestic** and **Outbound** tourism:
  - In 2017, domestic tourism accounted for 91% of total tourism trips. Outbound trips represented only 9%.
  - Different share rented/non-rented accommodation.

![Bar chart showing trips by destination and main accommodation for residents in Spain, 2017.](image)
Use of platforms by resident tourists

- **Domestic tourism:**

  Distribution of trips using rented accommodation by type

  ![Bar chart showing distribution of trips by type for domestic tourism in Spain from 2015 to 2017.](chart.png)

  - **Hotels:**
    - 2015: 63%
    - 2016: 61%
    - 2017: 58%
  - **Rented Dwelling:**
    - 2015: 17%
    - 2016: 18%
    - 2017: 19%
  - **Other market accommodation:**
    - 2015: 21%
    - 2016: 21%
    - 2017: 23%
Use of platforms by resident tourists

- **Outbound** tourism:
  - Distribution of trips using rented accommodation by type

![Bar chart showing distribution of trips to rented accommodation by type for outbound tourism in Spain from 2015 to 2017.](chart.png)
Use of platforms by resident tourists

- **Domestic tourism:**

  ![Pie chart showing the distribution of trips to rented dwellings by booking channel in domestic tourism in Spain 2017. The chart includes the following categories and their percentages: Specialised website (platform) 37%, Service provider-no internet 33%, Real estate-internet 8%, Service provider-internet 7%, Don't know 10%, Real estate-no internet 4%, Included in tourism package 1%.]

Trips to rented dwellings by booking channel
Domestic tourism. Spain 2017
Use of platforms by resident tourists

- **Domestic tourism:**
  - Rented dwellings and rooms: Evolution

![Bar chart showing trips to rented dwellings by booking channel (%). Domestic tourism. Spain.](chart.png)
Use of platforms by resident tourists

➢ Outbound tourism:

Trips to rented dwellings by booking channel

Outbound tourism. Spain 2017
Use of platforms by resident tourists

- **Outbound tourism:**

  - Rented dwellings and rooms: Evolution

![Trips to rented dwellings by booking channel (%)](chart)

*Outbound tourism. Spain*
Use of platforms by resident tourists

Trips characteristics. Domestic:

- Average duration (nights):
- Rented dwelling: 6.3
- Rented dwelling: 5.0
- Rented dwelling: 6.5

- Average expenditure per night (euros):
- Rented dwelling: 56
- Rented dwelling: 68
- Rented dwelling: 49

Considering all domestic trips, those booked through platforms represent 2% of the trips, 2.6% of the nights spent and 4.0% of total expenditure.
Use of platforms by resident tourists

Trips characteristics. Outbound:

Considering all outbound trips, those booked through platforms represent 9.3% of the trips, 7.5% of the nights spent and 7.4% of total expenditure.
Use of platforms by resident tourists

 Platforms’ users:

Trips to rented dwellings by booking channel and age of the tourist

![Bar chart showing trips by booking channel and age of the tourist]
Use of platforms: key points

- Sample sizes can limit the analysis
- What do we want to measure?
  a) Use of digital platforms? (no matter the type of accommodation)
  or
  b) Collaborative economy? (linked to the type of accommodation)

- If a):
  - what is platform? Airbnb, Booking ¿? - dynamic

- If b):
  - classification problems: rented dwelling/rural house
  - distinction of the type of owner not possible

- Understanding of the question
Conclusions

- Introducing a ‘simple’ question in existing surveys can give a quick and good insight on the digital/collaborative economy.

- But supply side still need to be covered:
  - Need to integrate sources: registers, platforms, taxes

- Try to measure associated errors: under/overestimation

Thank you for your attention!

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