

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

*María Izquierdo Valverde, INE Spain*

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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  $\approx$  6,000 trips
  - Annual estimates  $\approx$  106,000 questionnaires  $\approx$  71,000 trips

### **Residents Travel Survey. Sample size (number of trips). 2017**

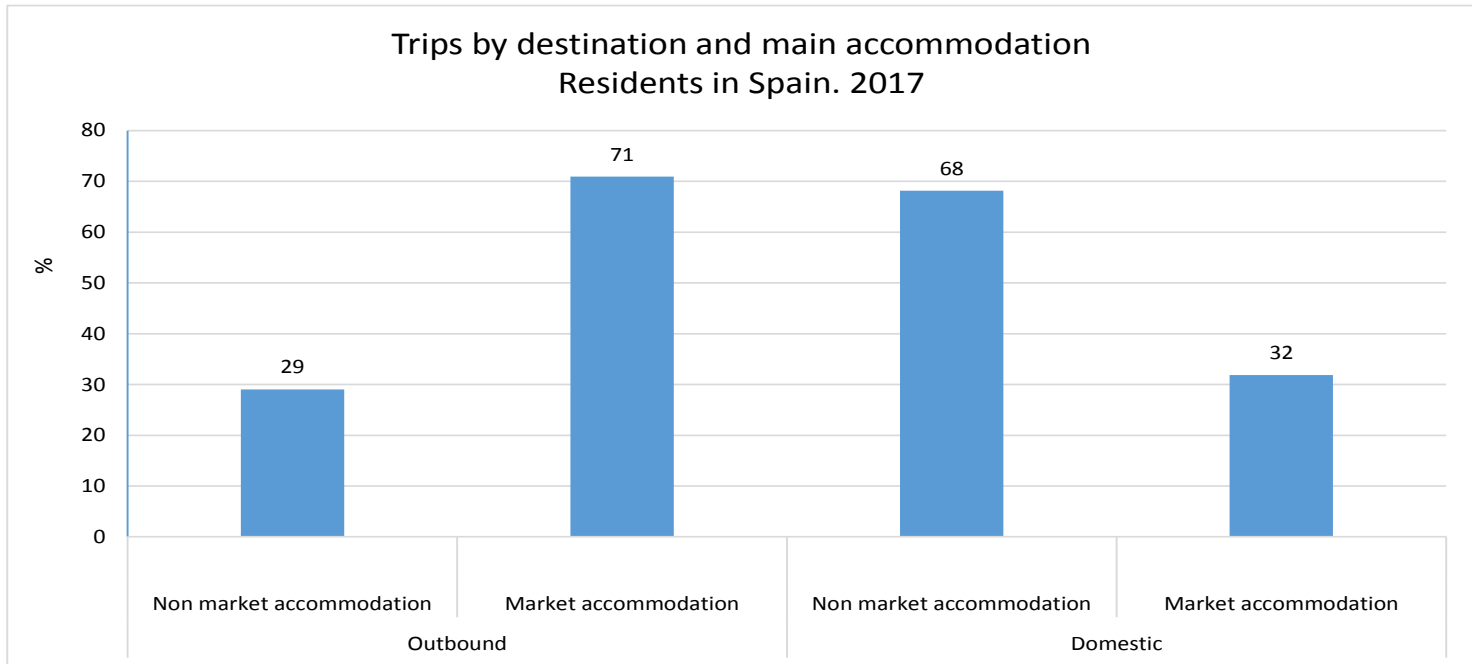
	Domestic	Outbound	Total
Market accommodation	19.523	4.495	24.018
Rented dwelling/room/swapping	2.799	755	3.554
Other market accommodation	16.724	3.740	20.464

## 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
    - 10-14. Non-rented accommodation (**13. Home swapping**)
  
  - 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

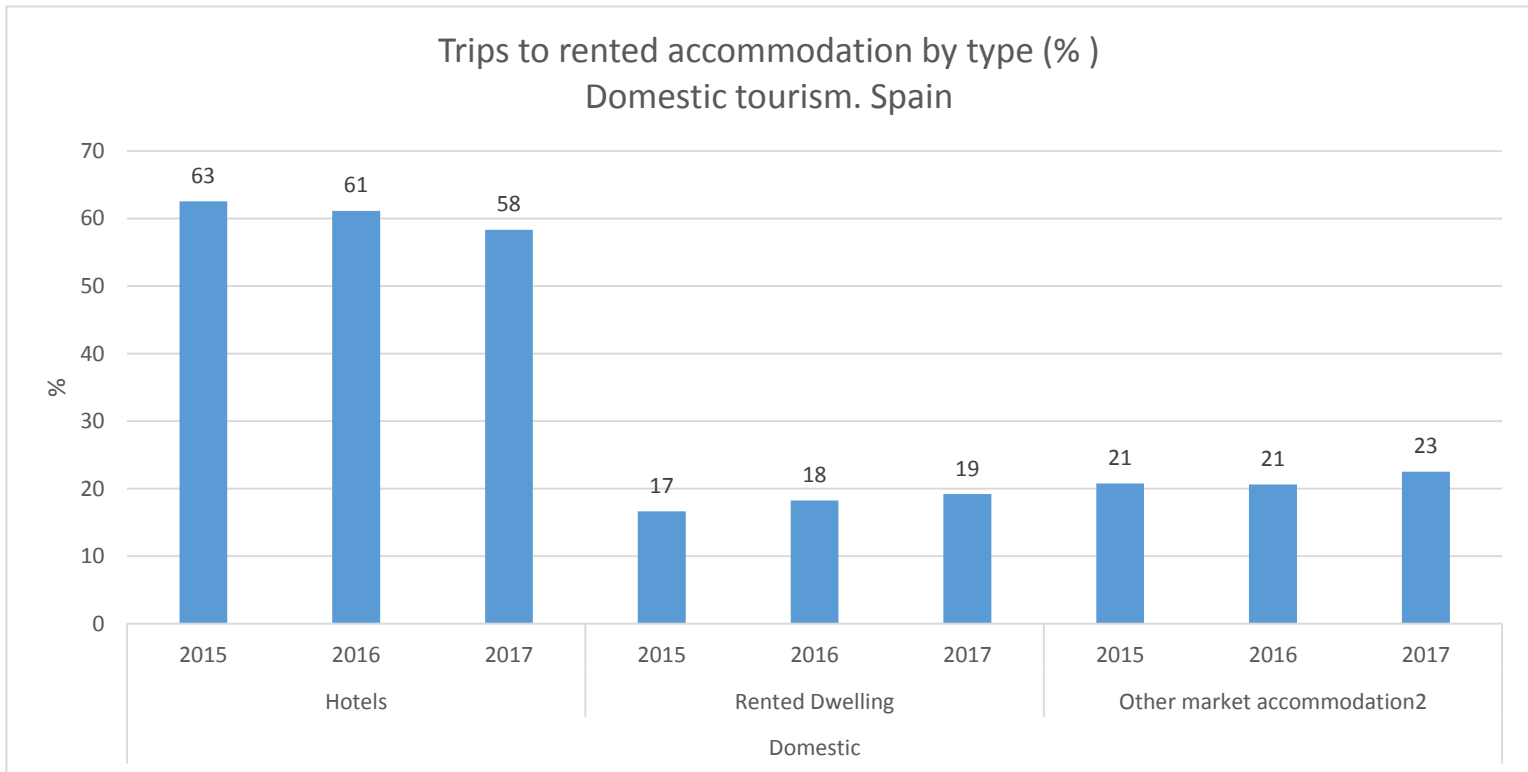
- Different results for **Domestic** and **Outbound** tourism:
  - In 2017, domestic tourism accounted for 91% of total tourism trips. Outbound trips represented only 9%
  - Different share rented/non-rented accommodation



# Use of platforms by resident tourists

➤ **Domestic** tourism:

## Distribution of trips using rented accommodation by type

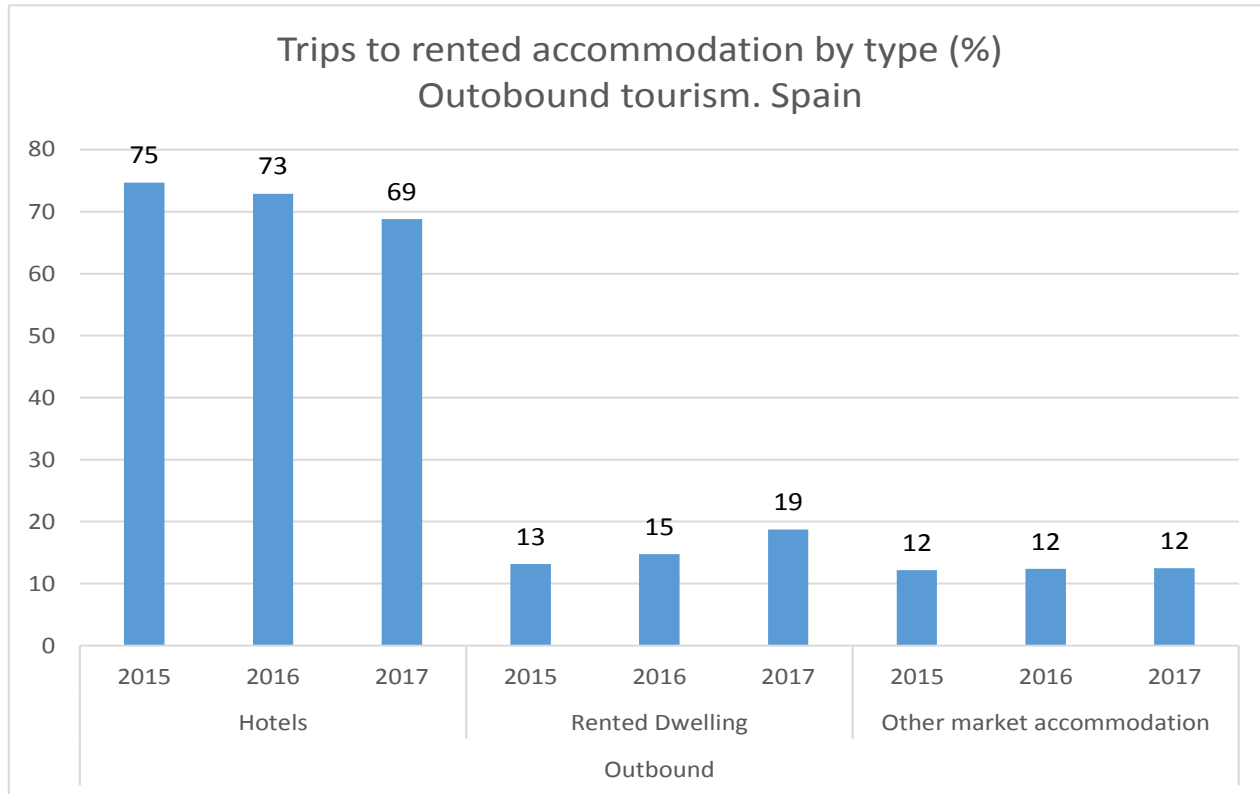




# Use of platforms by resident tourists

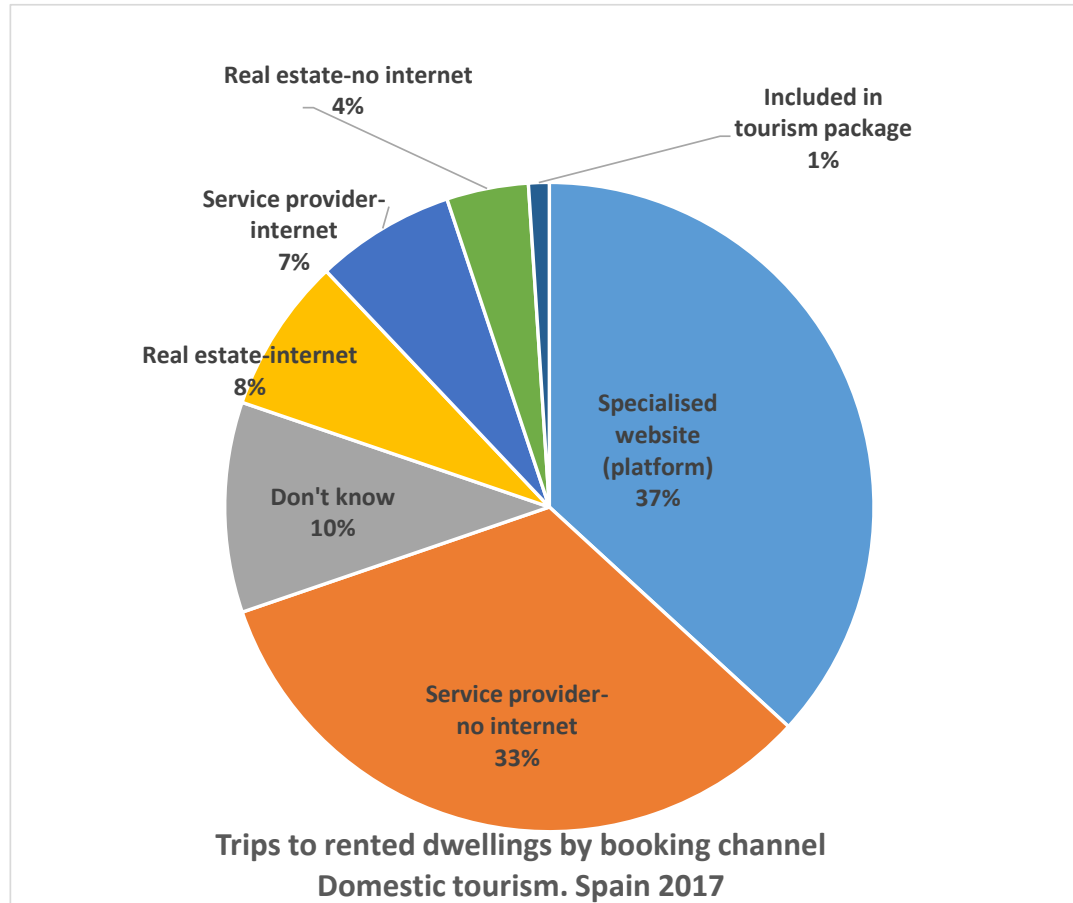
➤ **Outbound** tourism:

- Distribution of trips using rented accommodation by type



# Use of platforms by resident tourists

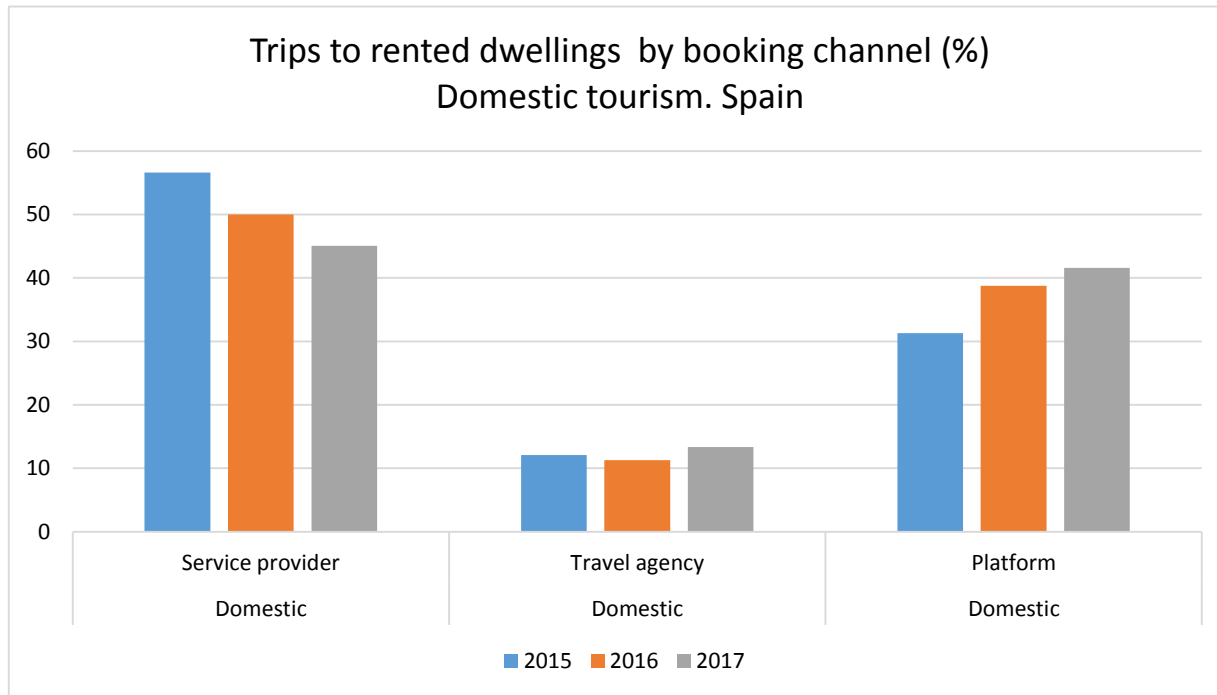
➤ **Domestic tourism:**



# Use of platforms by resident tourists

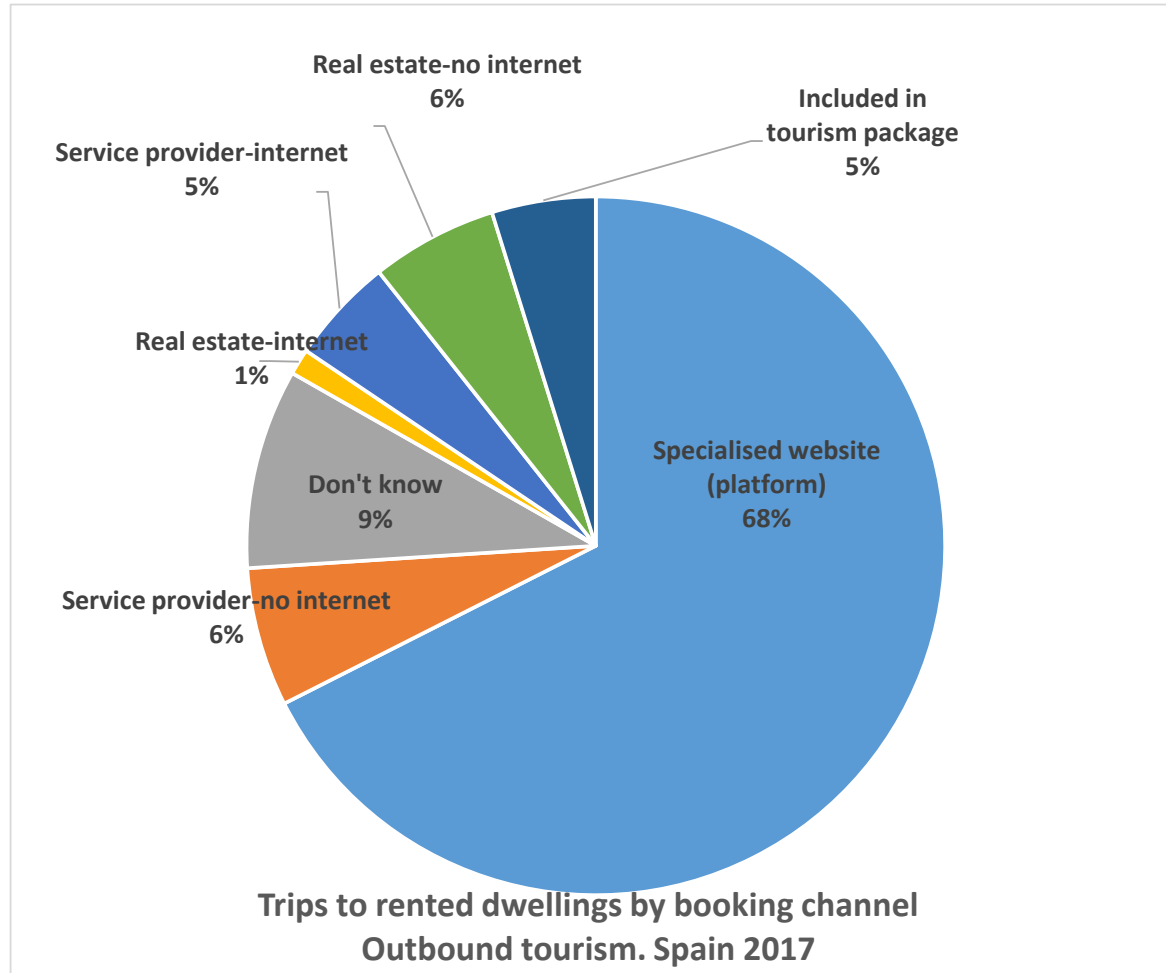
➤ **Domestic** tourism:

- Rented dwellings and rooms: Evolution



# Use of platforms by resident tourists

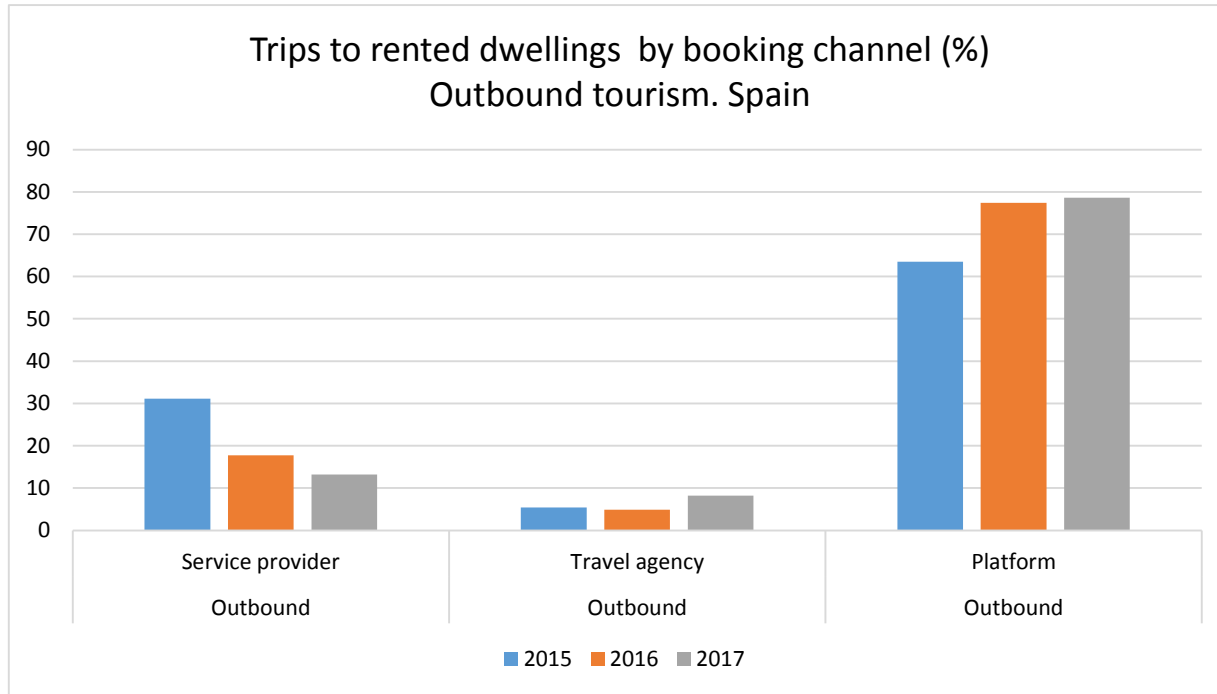
➤ **Outbound** tourism:



# Use of platforms by resident tourists

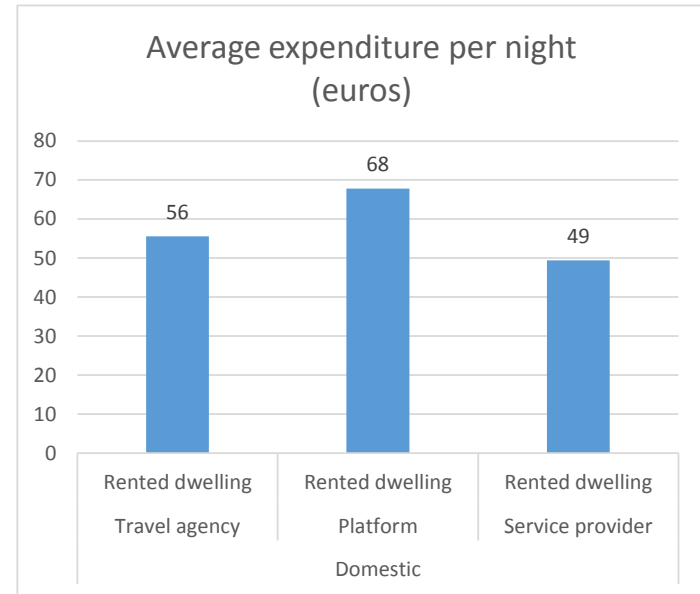
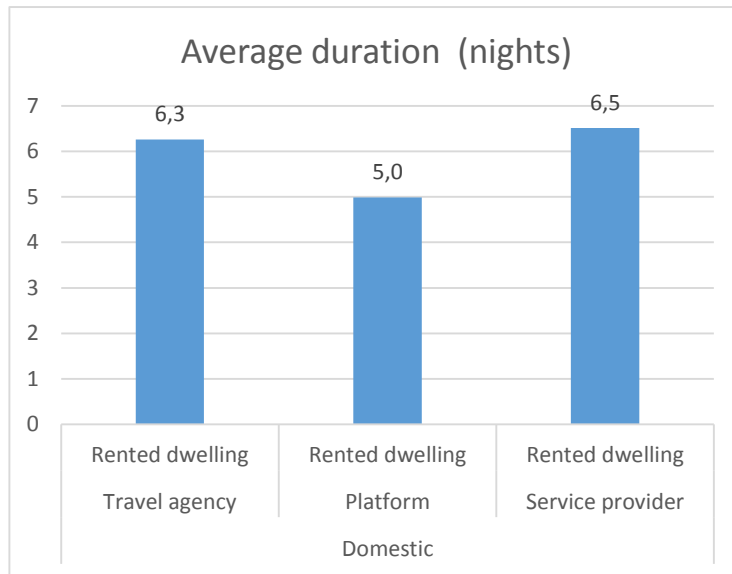
➤ **Outbound** tourism:

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# Use of platforms by resident tourists

## ➤ Trips characteristics. Domestic:

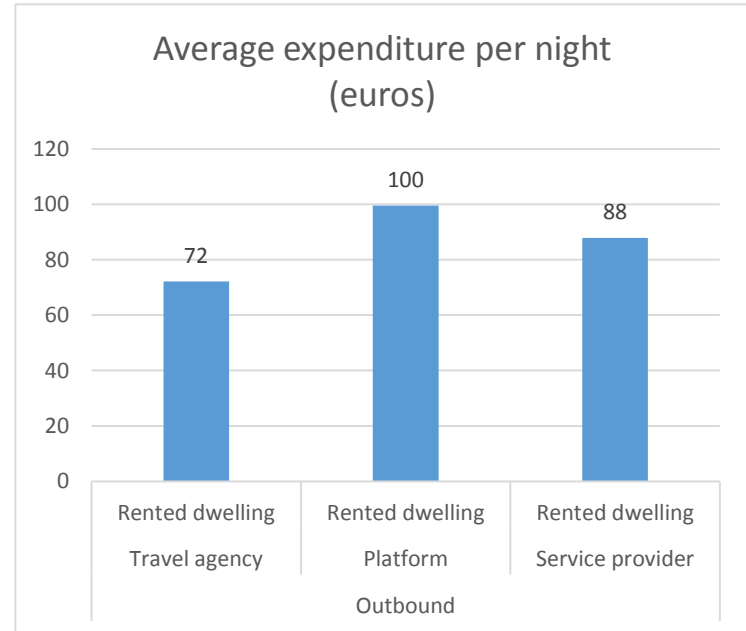
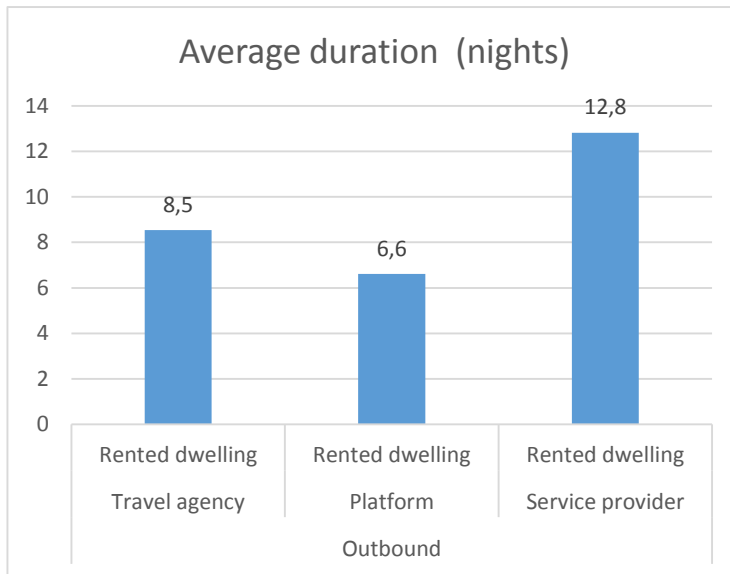


Considering all domestic trips, those booked through platforms represent 2% of the trips, 2.6% of the nights spent and 4.0% of total expenditure.



# Use of platforms by resident tourists

## ➤ Trips characteristics. Outbound:



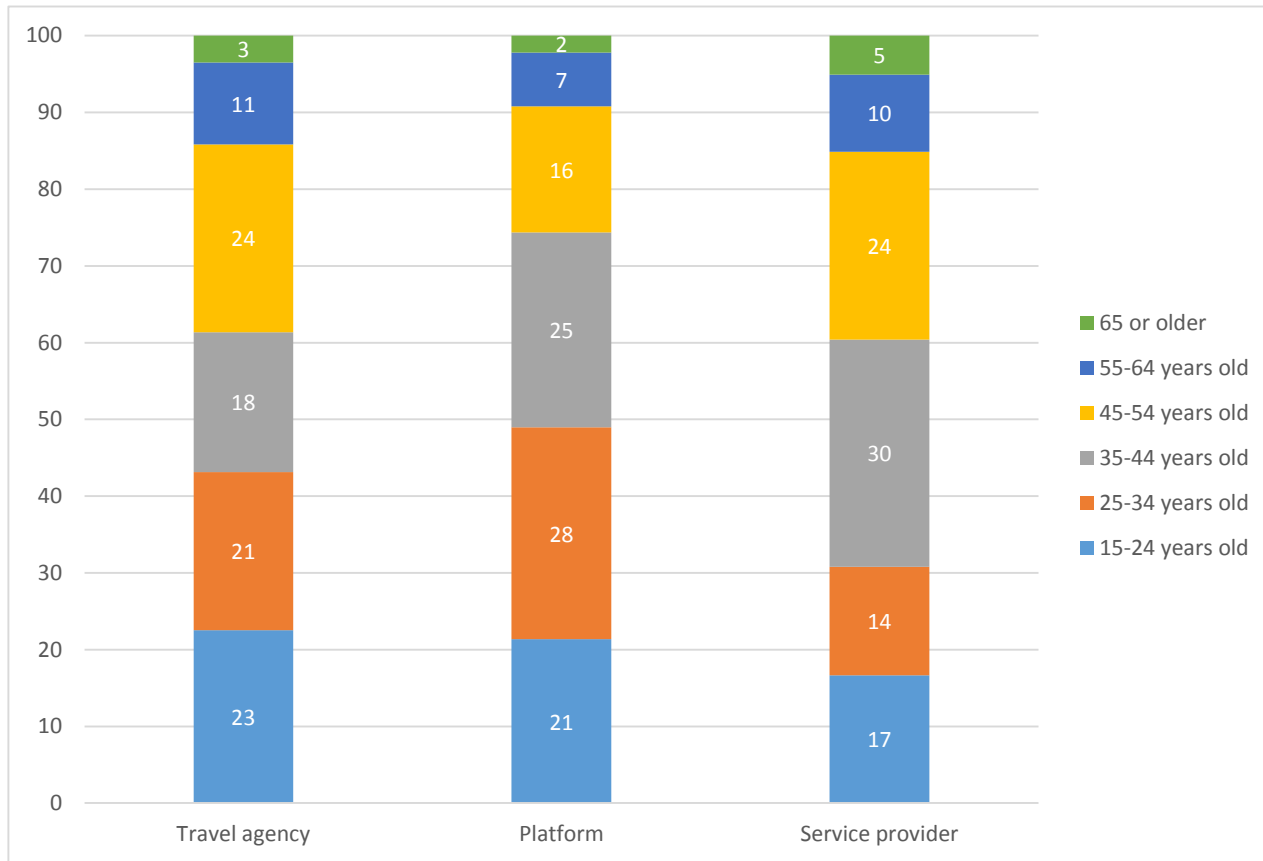
Considering all outbound trips, those booked through platforms represent 9.3% of the trips, 7.5% of the nights spent and 7.4% of total expenditure



# Use of platforms by resident tourists

➤ **Platforms' users:**

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





## 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!**

maria.izquierdo.valverde@ine.es  
turismo@ine.es

