



# Overview of the Airbnb Community in Italy

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# Executive Summary - Italy

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Airbnb hosts in Italy have been welcoming guests into their homes since 2008. Over the past eight years, Italy residents have formed a vibrant Airbnb community, sharing unique experiences with travelers from around the world.

## Economic Impact

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**€3.4 B**

Total economic impact

**3.6 M**

Inbound guests in the past year

## Environmental Impact

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Energy savings equivalent of

**51.1 M Homes**

# Overview of the Airbnb Community in Italy

Airbnb hosts in Italy have been welcoming guests into their homes since 2008. The following page captures the Airbnb community in Italy between January 1, 2015 and January 1, 2016.

## Hosts

**83,300**

Hosts who have hosted in the past year

**€2,300**

Annual earnings for a typical host

**26**

Days hosted annually per typical listing

## Guests

**3.6 M**

Inbound guests in the past year

**3.6 nights**

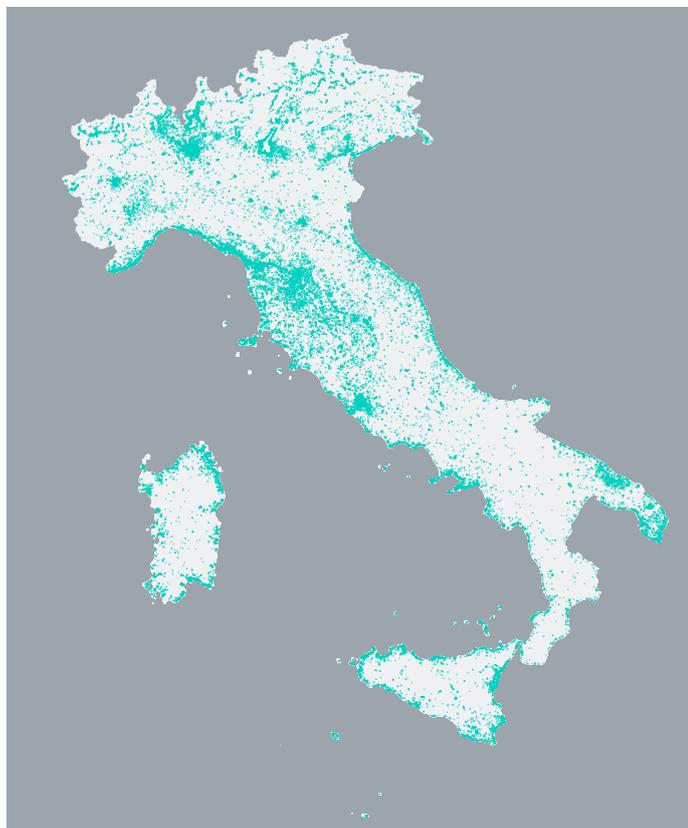
Average length of stay per guest, compared to 3.0 for traditional accommodations

**1.34 M**

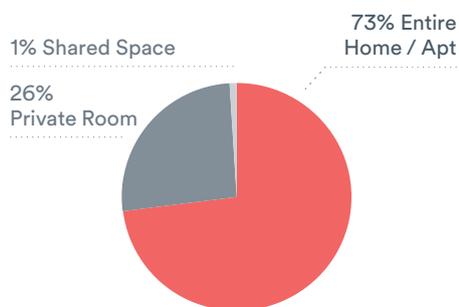
Outbound guests in the past year

## Airbnb Listings

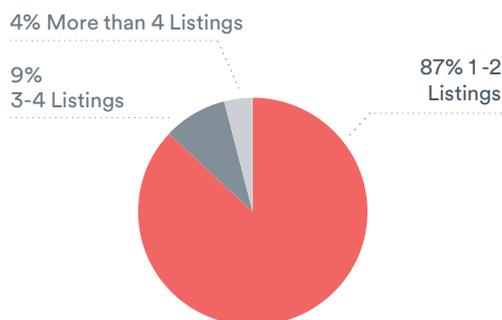
### AIRBNB LISTINGS VISITED IN THE PREVIOUS YEAR



### CURRENTLY ACTIVE LISTINGS BY TYPE



### # OF LISTINGS PER HOST



Note: This report summarizes the Airbnb community and impact in Italy between January 1, 2015 and January 1, 2016. All data is based on this time period. Unless otherwise noted, all data presented in the report is drawn from Airbnb proprietary bookings data or from an Airbnb survey of hosts and guests to Italy during 2015, hotel length-of-stay data, which is drawn from the Italian National Institute of Statistics tourist flow data for the year 2014.

# Airbnb Host Profile

Airbnb hosts in Italy are regular community members who rent their homes occasionally throughout the year, earning modest but significant supplemental income to help make ends meet.

## Host Demographic Profile

**43**

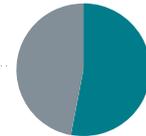
Average host age

**31%**

Hosts over age 50

### HOST GENDER

47% Male



53% Female

**73%**

Hosts living in family households

**32**

Average number of years a host has lived in their hometown

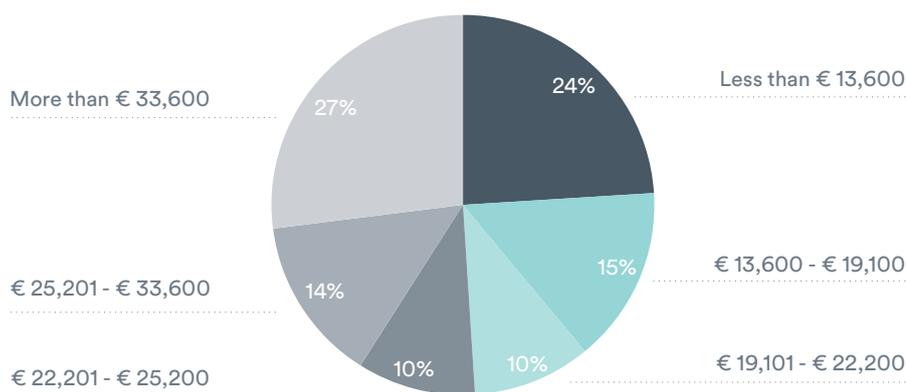
**44%**

Hosts who primarily rent their primary home

## Host Economic Profile

The income that Airbnb hosts earn is critical to helping them make ends meet and stay in the homes they love. Many of the Airbnb hosts in Italy earn below the national median income.

### HOST INCOME LEVELS



**49% of hosts' household income is at or below Italy's median household income.**

(€ 22,200 /year)

Note: Median income data for Italy is from European Commission's Eurostat database, 2013 Income by Quintile tables, adjusted for average household size and inflated to 2015 values.

# Airbnb Guest Profile

Airbnb guests to Italy predominately travel for vacation and leisure. Guests chose to stay in Airbnb properties because they are looking for an authentic, local experience.

## Guest Profile

2.6

People in the average party size

92%

Percent of trips that involve 4 or fewer guests

87%

Guests who chose Airbnb so they can "live like a local."

### GUEST TRAVEL MOTIVATIONS

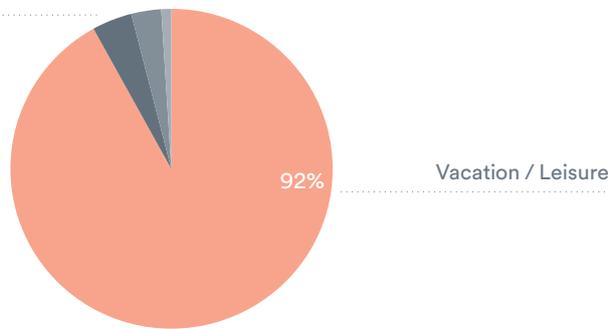
Visiting friends / family - 3%

Work-related reasons

1% Conference

3% Business

Other - 1%



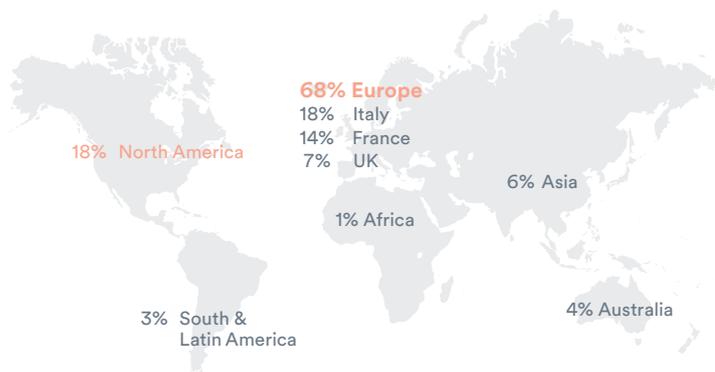
92% of Airbnb guests visit Italy for vacation and leisure.

“ Airbnb took a promising trip and made it amazing. We met the best people, stayed in villages where no hotels existed, and really felt integrated in the communities we visited.

Leslie C., Airbnb Guest from North America

## Guest Origin

Guests from around the world are using Airbnb to visit Italy.



## Host and Guest Quotes

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“ Airbnb makes all the difference in my travel - great way to save money and we get to stay in places way more interesting than a hotel.

Airbnb Guest to Italy

“ I feel part of a community where courtesy and equality between people are very important.

Marica R., Airbnb Host in Tuscany

# Airbnb and Tourism

Responsible home sharing is a new engine for Italy tourism and the Italian economy. Airbnb grows the tourism pie, attracting many guests who might otherwise not have come, or been able to stay as long.

## Tourism

**3.6 nights**

Average length of stay per guest, compared to 3.0 for traditional accommodations

**28%**

Guests who would not have come or not have stayed as long without Airbnb

**76%**

Guests for whom Airbnb makes them more likely to return

## Airbnb Guest Experiences

Airbnb guests to Italy are often looking for more than traditional accommodations offer. Staying in a home provides them with the amenities they want, and results in positive experiences that make them want to return.

**4.6**

Average host rating (out of 5)

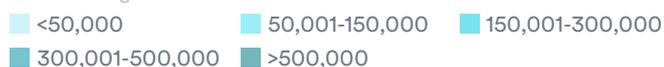
**87%**

Guests who chose Airbnb because of the amenities

### DISTRIBUTION OF GUESTS BY REGION



Number of guests



# Tourism and the Local Economy

The economic activity of Airbnb guests in Italy contributes to local economic health, supporting local resident hosts whose Airbnb income is critical to helping them make ends meet, and supporting local businesses that don't typically benefit from tourism spending.

## National Economic Impact

**€3.4 B**

Total economic impact

**98,400**

Total jobs supported

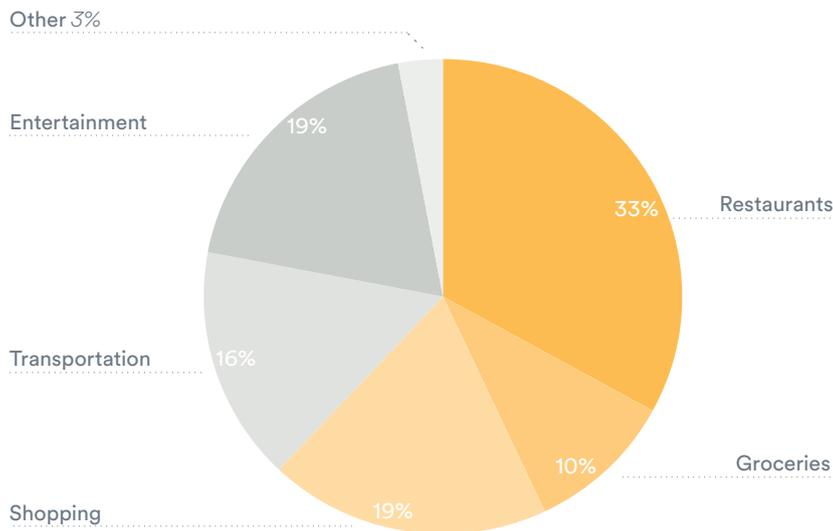
## Guest Spending

**€394 M**

Income earned by local households

**€2.13 B**

Estimated visitor spending at Italian businesses



The average Airbnb guest spends 38% of their money at local businesses in the neighbourhoods in which they stay.

Airbnb guests spent € 738M at restaurants and bars during their visits.

Airbnb guests ate almost 13 million dinners in Italy.

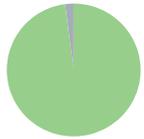
The economic impact and jobs supported analysis was prepared by Italian economist, Antonio Preiti. The impact was calculated using the national domestic demand multiplier from the Centro Europa Ricerche (CER) econometric model.

Number of dinners is equal to the number of guest nights (total nights spent in Airbnb listings multiplied by total number of guests).

# Environmental Impacts

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Staying in an Airbnb property is, by its nature, much more resource efficient and environmentally friendly than typical accommodations.



**98%**

Hosts who incorporate environmentally-friendly practices in their hosting

**85%**

Hosts who provide recycling facilities for guests

**15%**

Hosts who provide bicycles for guests

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By staying in properties available on the Airbnb platform instead of traditional accommodation options, Airbnb guests in Italy between January 1st, 2015 and January 1st, 2016 resulted in an estimated:

Energy savings equivalent of

**51.1 M homes**

Water reduction equivalent of

**800 Olympic-sized pools**

Greenhouse gas emissions equivalent of

**147.4 M cars**

Waste reduction of

**Up to 7,300 tons**

“ Our apartment was built with green building techniques and all the crops in our garden are organic.

Airbnb Host in Tuscany

“ I made the furniture in the apartment where I host, using old pallets and old mason’s tools ... all wood and green.

Airbnb Host in Florence

# Case Study: Florence

## Hosts

**3,700**

Hosts who have hosted in the past year

**€6,300**

Annual earnings for a typical host

**64**

Days hosted annually per typical listing

## Guests

**364,000**

Inbound guests in the past year

**3.2 nights**

Average length of stay per guest

**40,000**

Outbound guests in the past year

## Guest Spending

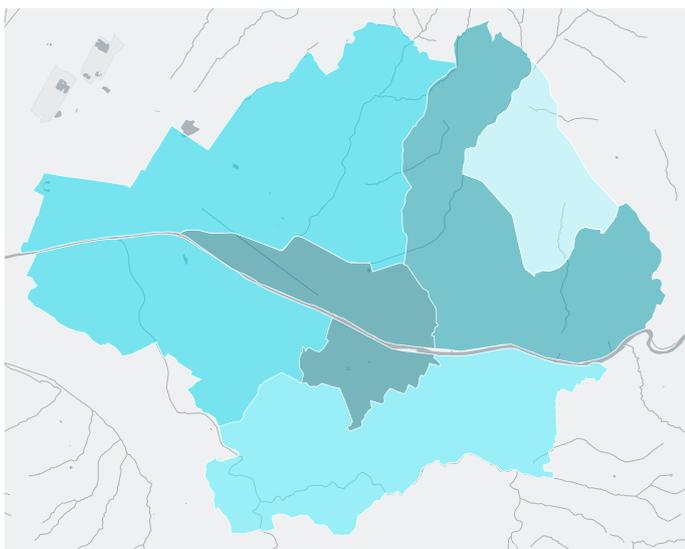
**€38 M**

Income earned by local households

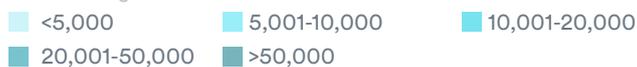
**€169 M**

Estimated visitor spending at Florence businesses

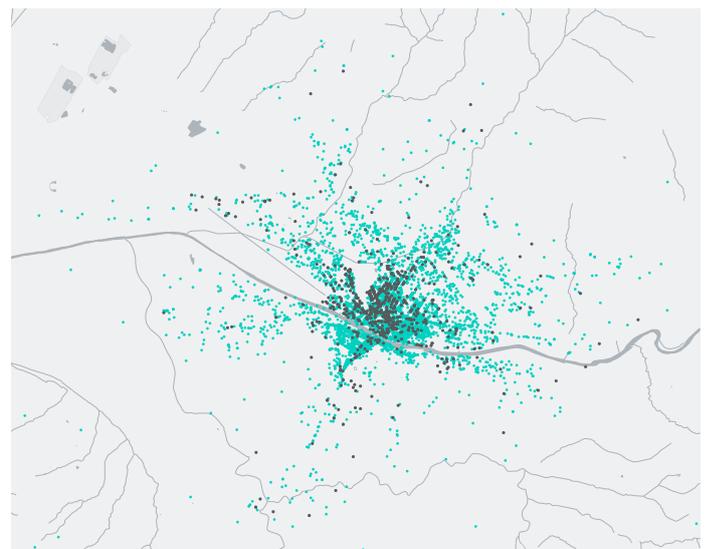
AIRBNB VISITATION BY NEIGHBORHOOD



Number of guests



AIRBNB PROPERTIES VS. HOTELS



# Case Study: Rome

## Hosts

**9,900**

Hosts who have hosted in the past year

**€5,500**

Annual earnings for a typical host

**50**

Days hosted annually per typical listing

## Guests

**758,000**

Inbound guests in the past year

**3.7 nights**

Average length of stay per guest

**203,000**

Outbound guests in the past year

## Guest Spending

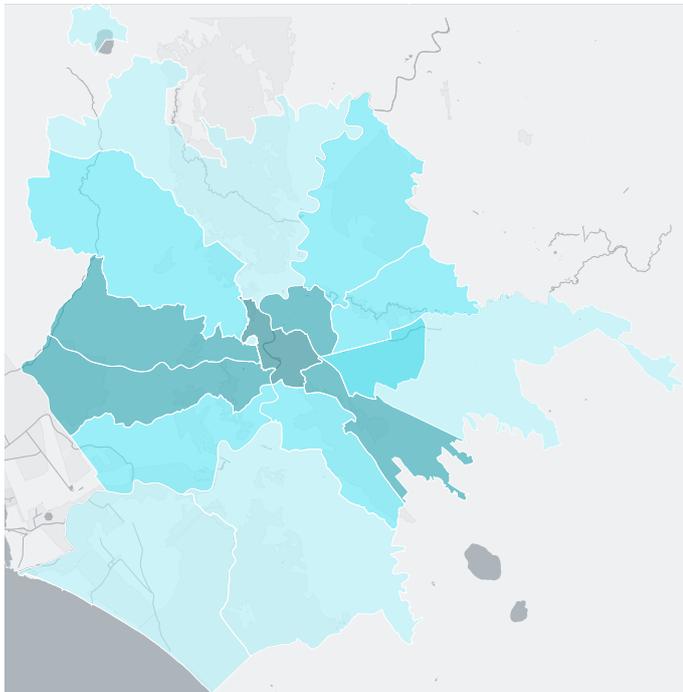
**€93 M**

Income earned by local households

**€400 M**

Estimated visitor spending at Rome businesses

### AIRBNB VISITATION BY NEIGHBOURHOOD



Number of guests

<5,000

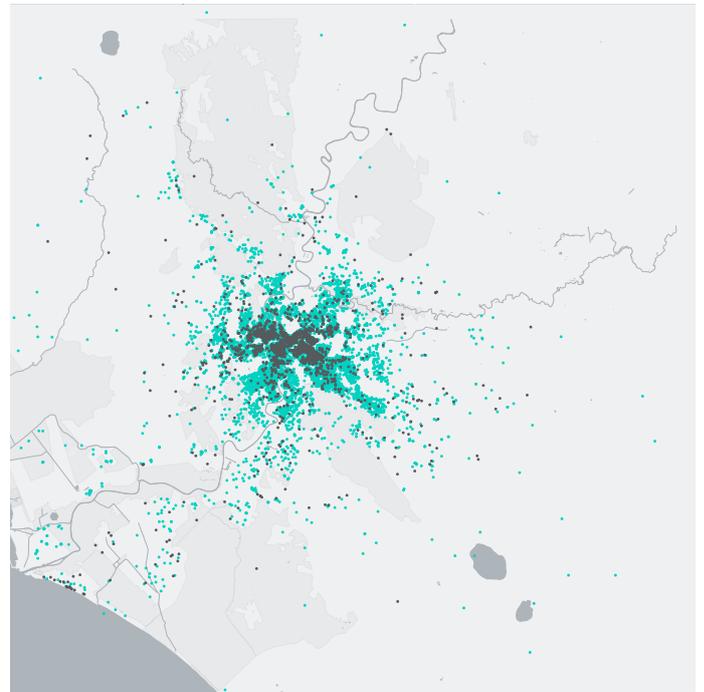
5,001-15,000

15,001-30,000

30,001-60,000

>60,000

### AIRBNB PROPERTIES VS. HOTELS



Airbnb properties

Hotels

# Case Study: Airbnb Around the Rome Metro

## Listings and Guests

**538,000**

Guests who stayed within  
1 km of a metro station

**71%**

Guests who stayed within 1 km  
of a metro station  
should be kilometre

## Listings that hosted during 2015 that are within 1 kilometer of a metro station



- 1 kilometer buffer zone around metro stations
- Listings within 1 kilometer from a metro station
- Listings further than 1 kilometer from a metro station

# Case Study: Milan

## Hosts

**9,600**

Hosts who have hosted in the past year

**€2,700**

Annual earnings for a typical host

**33**

Days hosted annually per typical listing

## Guests

**456,000**

Inbound guests in the past year

**3.2 nights**

Average length of stay per guest

**166,000**

Outbound guests in the past year

## Guest Spending

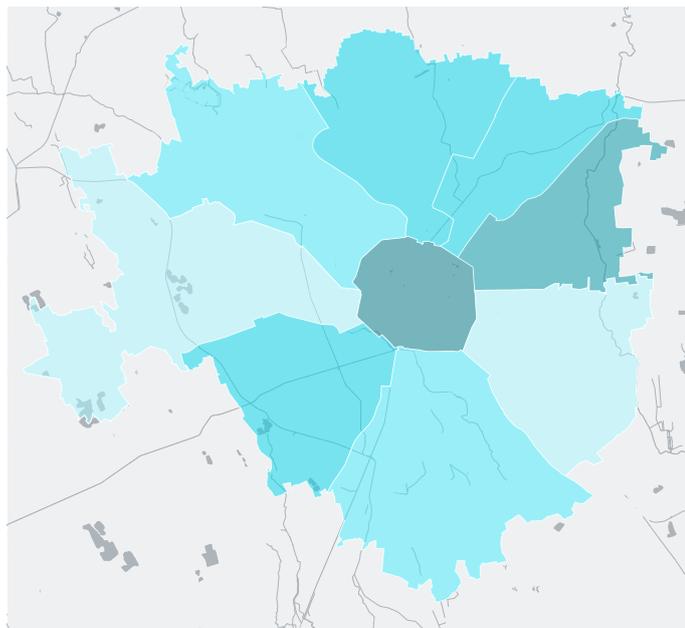
**€48 M**

Income earned by local households

**€229 M**

Estimated visitor spending at Milan businesses

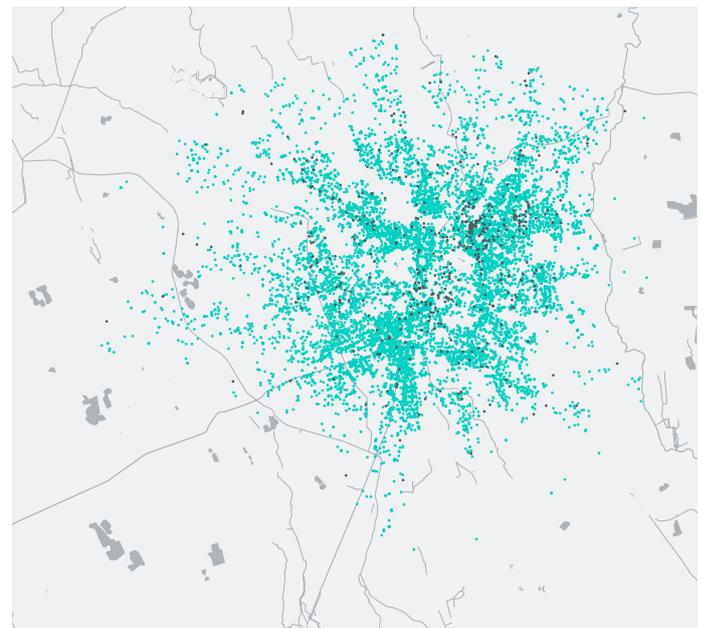
AIRBNB VISITATION BY NEIGHBORHOOD



Number of guests



AIRBNB PROPERTIES VS. HOTELS



# Case Study: Milan Expo - Overview

In the six months between May 1, 2015 and October 31, 2015, Milan hosted the 2015 World's Fair. Airbnb hosts provided Fair guests with a unique way to experience the city, and many visitors took advantage of being able to live like a local.

## Hosts and Listings

**8,400**

Hosts who hosted during the Expo

**11,200**

Listings hosted guests during the Expo

**€93**

Average nightly rate during the Expo

## Guests

**339,000**

Inbound guests during the Expo

**2.5**

Average party size during the Expo

**3.0 nights**

Average trip length during the Expo

## Guest Spending

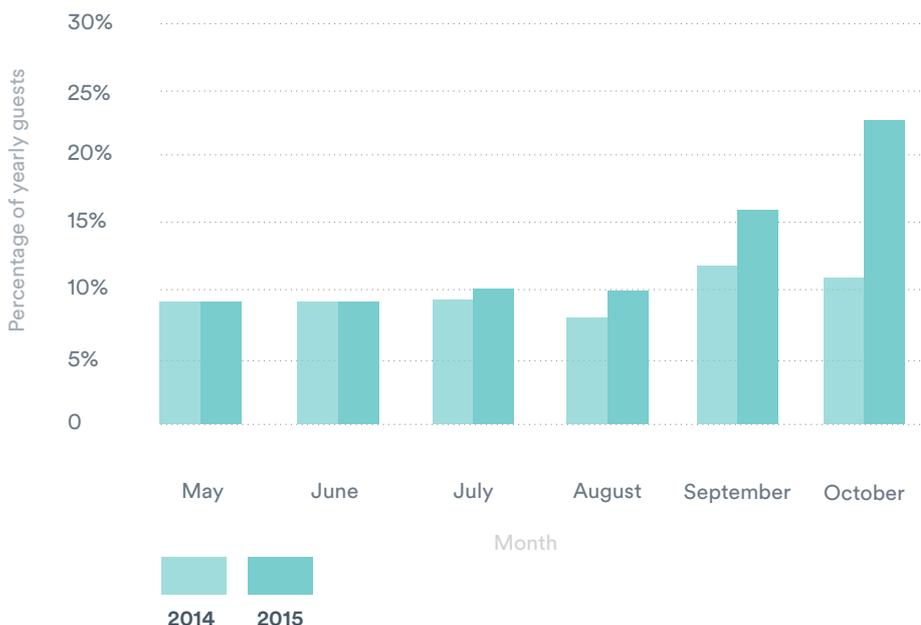
**€33 M**

Income earned by local households

**€160 M**

Estimated visitor spending at Italy businesses

## ANNUAL GUESTS DURING THE EXPO PERIOD IN BOTH 2014 AND 2015

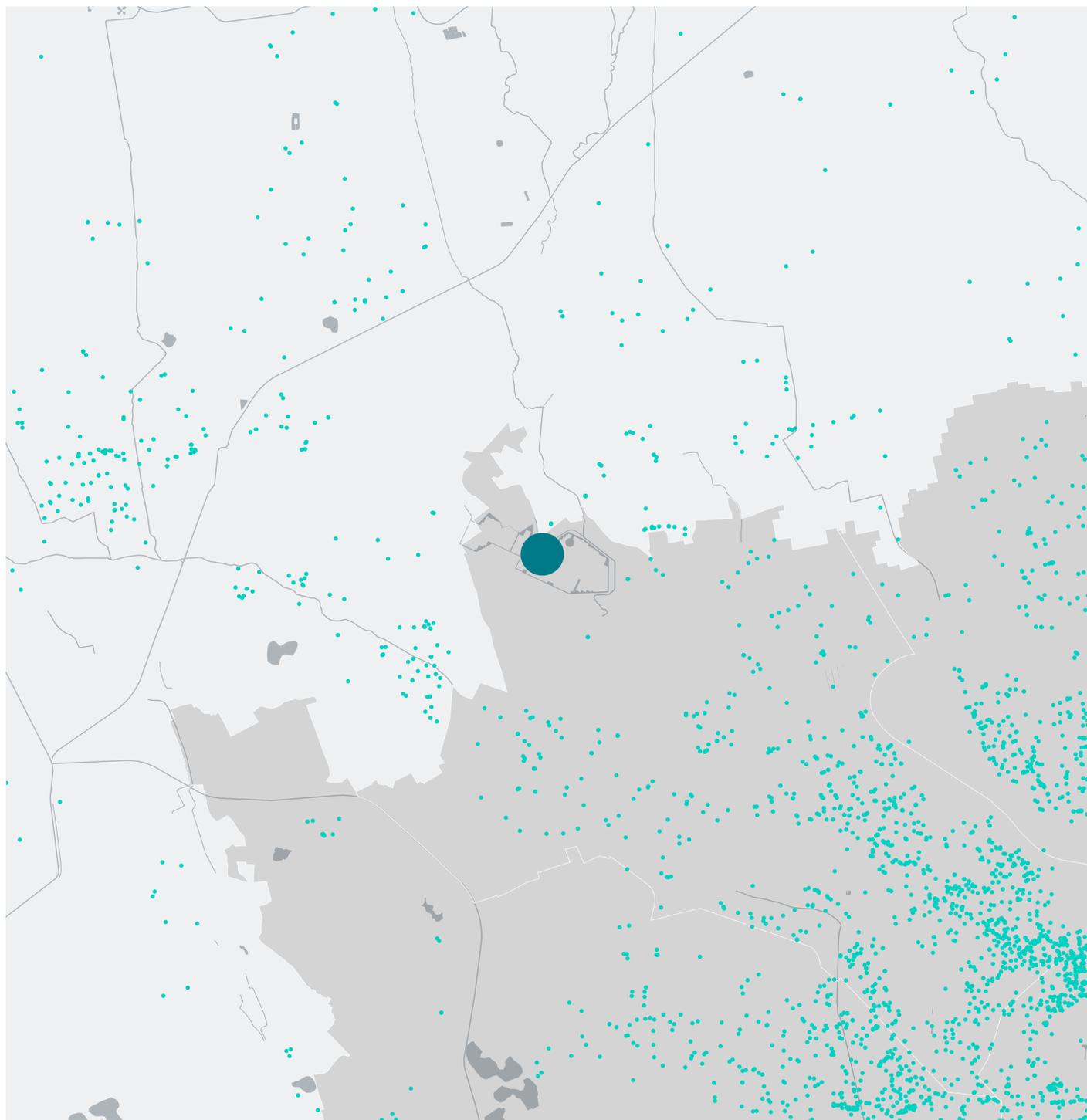


**74% Airbnb guests to Milan visited during Expo months in 2015.**

(Compared to just 58% during the same months in 2014)

# Case Study: Milan Expo - Guest Distribution

## Hosted listings around Milan during the Expo



- Airbnb properties
- Expo location
- City of Milan

**14%**

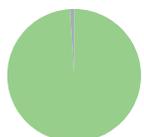
Guests in Milan who stayed within 5km of the Milan Expo

**12%**

Guests in the region of Lombardy who stayed within 5km of the Milan Expo

# Case Study: Milan Expo - Environmental Benefits

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**99%**

Hosts who incorporate environmentally-friendly practices in their hosting

**91%**

Hosts who provide recycling for guests

**31%**

Hosts who use green cleaning supplies

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By staying in properties available on the Airbnb platform instead of traditional accommodation options, Airbnb guests in Milan during the 2015 Expo between resulted in an estimated:

Energy savings equivalent of

**4,000 homes**

Water reduction equivalent of

**63 Olympic-sized pools**

Greenhouse gas emissions equivalent of

**11,400 cars**

Waste reduction of

**Up to 560 tons**

# All Definitions

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Annual Earnings (Typical Host)	Median value of total income earned by host during the one-year study period. Annual earnings are presented for typical hosts.
Average Length of Stay	The average length of stay per guest, rather than per trip.
Guest	Airbnb community members who stay in Airbnb listings.
Host	Airbnb community members who rent space on Airbnb.
Inbound Guest	All guests visiting a particular location. Inbound guests includes guests who live in the same location they may have stayed in.
Listing (Active)	A property listed on Airbnb. Listings may include entire homes or apartments, private rooms or shared spaces. Active Listings are all listings that appear on the website during a search. Active listings do not necessarily have availability on a particular date or at all.
Listing Types	<p>Airbnb classifies listings as three different types: Entire Home / Apartment listings, Private Room Listings, and Shared Room Listings:</p> <p><b>Entire Home / Apartment Listing</b> - A listing where the guest can rent the entire home from the host. The host is not present in the home during the guest's stay.</p> <p><b>Private Room Listing</b> - A listing where the guest can rent a private bedroom within a home. The host may be present in other parts of the home during the guest's stay, and the guest may share common spaces like the kitchen, living room, and/or a bathroom with the host.</p> <p><b>Shared Room Listing</b> - A listing where the guest can rent a communal space, such as a shared bedroom or a living room sofa, within a home. The host may be present in the home during the guest's stay, and the guest may share common spaces like the kitchen and/or a bathroom with the host.</p>
Nights Hosted (By Listing)	Total number of nights a given listing is rented through Airbnb in the study period. Only listings that were active as of the start of the study period, and had at least one booking during the study period are included, in order to present the most representative annual values for Airbnb hosting activity.
Nights Hosted (Typical Host)	Median value of total nights hosted per host during the one-year study period. Nights Hosted are presented for typical hosts.
Outbound Guest	All guests from a particular location who booked an Airbnb listing, regardless of where the listing is. There may be some minor overlap between Inbound Guests and Outbound Guests. All guests associated with a particular reservation are attributed to the location of the booking guest.
Total Economic Impact	The direct, indirect, and induced economic impact supported in a community directly related to Airbnb host and guest spending. This number is an estimate, calculated based on host earnings from Airbnb bookings data, guest spending estimates based on external data sources, and a economic multiplier range of 1.0 to 1.5.
Typical Host	The median host for all hosts who had at least one active listing as of the start of the study period and at least one booking during the study period. Typical host definitions are used to calculate Annual Earnings and Nights Hosted. Presenting the median value for all hosts who were active as of the start of the study period provides the most representative values for the Airbnb host community.