



Study on the Assessment of the Regulatory Aspects Affecting the Collaborative Economy in the Tourism Accommodation Sector in the 28 Member States (580/PP/GRO/IMA/15/15111J)

European Commission - Directorate General Internal Market, Industry, Entrepreneurship
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Task 4

Market Case study – Barcelona



This study was carried out for the European Commission by
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Definitions:

The key terms used in the case study are defined below. It should be noted that these definitions may differ from the definitions used by the European Commission.

Primary residences: those residences (dwellings) where the person resides more than 180 days per year.

Secondary residences: those residences (dwellings) where the owner spends at least some days per year.

Short-term rental: the rental of an accommodation (room or entire property) on a short-term basis. "Short-term" can be defined by local laws as the maximum period per year during which an accommodation provider can rent out their property or part thereof under specific circumstances.

Long-term rental: the rental of an accommodation (room or entire property) on a long-term basis. "Long-term" can be defined as a period exceeding any short-term threshold imposed by local, regional or national laws (see definition of "short-term rental").

Vacant property: A residence (dwelling) that is not occupied by their owners or any tenants.

Peer provider: For the purpose of this study, the term is used to designate all providers of short-term rentals on collaborative platforms. In certain cases, where data are available, the text makes a distinction between "peer" and "professional" provider. In this case, "peer provider" refers to individuals who do not conduct such activities on a professional basis, i.e. earning the majority of their income through to short-term rentals.

Conventional dwelling: The term is defined according to its definition on EUROSTAT, namely a room or a suite of rooms and its accessories in a permanent building or structurally separated part thereof which by the way it has been built, rebuilt or converted; it is designed for habitation by one private household all the year round and is not at the time of the census used wholly for non-residential purposes.

Vacant conventional dwelling: According to EUROSTAT, vacant conventional dwellings are conventional dwellings (see above) which have no usual residents at the time of the census but are available to become the principal usual residence of at least one person. Vacant dwellings could be either: seasonally vacant, holiday homes, seasonal workers' quarters, non-seasonally vacant, secondary residences, for rent, for sale, for demolition, or for other purposes.

1 Overview of the accommodation sector

This section gives an overview of the short-term accommodation sector in Barcelona. It describes the main players, and gives an insight of the economic development, and explains the main local rules shaping the short-term rental market.

Facts and figures – Barcelona

Barcelona is the capital of the Spanish region of Catalonia with 1,608,740 inhabitants (in 2016). Barcelona is a home to 3.5% of the overall Spanish population.¹

Barcelona is an important economic centre of Spain. In 2012, it generated a national gross domestic product (GDP) of EUR 64.24 million – just over 30% of the national GDP.² The tourism industry accounts for a great part in Spanish economy as, in 2015, Spain was the third most visited country in the world after the United States of America and France.³ Barcelona is also a popular tourist destination with over 6.5 million international arrivals in 2015, which ranks it sixth in Europe (after London, Paris, Berlin, Rome and Madrid), and 25th in the world.⁴

The administration of Barcelona is formed of:

- **The Barcelona City Council.** They define and implement policies for the city. It is formed of three entities:
 - The Mayor of Barcelona, elected every four years, the Mayor chairs and represents the City Council.
 - The Municipal Council is composed of councillors, who are also elected every four years. The Municipal Council meets once a month and is composed of different meetings and committees dealing with specific issues.
 - The Municipal Government Commission is the Barcelona City Council's executive body. It is composed of the Mayor, deputy mayors and appointed councillors.
- **The District Councils.** Those are decentralised administrative bodies run by a District Councillor. The city of Barcelona is divided into 10 districts,⁵ themselves sub-divided into 74 neighbourhoods ("barris").

The map on the following page shows the city of Barcelona and its 10 districts.

1 Eurostat, Population on 1 January by age groups and sex – cities and greater cities. Available at: <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>, accessed on 16/03/2017.

2 Idescat. Territorial Gross Domestic Product. Available at: <http://www.idescat.cat/pub/?geo=mun:080193&id=pibc&n=1538&lang=en>, accessed on 08/07/2017 P. 29

3 Cohispania, 2016. Hospitality Market Report – Spain 2015.

4 International arrivals by city includes visitors from abroad who arrive at the city under review as their first point of entry, and also includes those visitors to the city who arrived in the country via a different point of entry, but then go on to visit the city in question during their trip. Source: Euromonitor International, Top 100 City Destinations Ranking 2017. Available at: <http://blog.euromonitor.com/2017/01/top-100-city-destination-ranking-2017.html>, accessed on 16/03/2017.

5 Ciutat Vella, Eixample, Sants-Montjuic, Les Corts, Sarria-Sant Gervasi, Gracia, Horta-Guinardo, Nou Barris, Sant Andreu, Sant Marti.

Figure 1: Map of Barcelona



1.1 Main players in the collaborative economy accommodation sector

At national level, the National Commission on Markets and Competition (CNMC) is researching the current situation of the collaborative economy in Spain and its impacts for the economy and society.⁶

At regional level, the autonomous community (i.e. region) of Catalonia has the exclusive competence in housing and tourism matters. The Barcelona City Council has the power to set urban planning and zoning rules.⁷ Authorities at regional and local levels are exploring the impact of the collaborative economy in the tourism and hospitality industry and publish literature on the topic. The Government of Catalonia has set an intergovernmental working group and has commissioned a report on the collaborative economy that should include policy proposals for better regulation of the sector and has launched a public consultation on the topic.⁸ At the time of drafting, the Catalan Government is reviewing a draft regional Decree on a Tourism Regulation in Catalonia⁹, which would adapt sector-specific rules to

6 In October 2016, the CNMC has published a report based on a survey of platform users. See: CNMC website, "Uno de cada tres internautas utiliza plataformas de economía colaborativa al menos una vez al año". Available at: <https://www.cnmc.es/en/node/267044>, accessed on 29/05/2017.

7 Rating Legis, 2016, Analytical paper on market access requirements in the short-term accommodation rental sector in Barcelona, Berlin and Amsterdam, p. 4. Available at: <http://ec.europa.eu/DocsRoom/documents/16948/attachments/1/translations>, accessed on 24/05/2017.

8 See: Government of Catalonia website, "Participa en la economía colaborativa". Available at: <http://web.gencat.cat/es/actualitat/detall/Participa-Gencat-leconomia-colaborativa>, accessed on 29/05/2017. The Catalan Competition Authority also works on the topic and has recently published a report on the regulation of the tourism accommodation sector. See: Autoritat Catalana de la Competència, 2016, Una regulació dinàmica en el àmbit del allotjament turístic. The Barcelona City Council has commissioned four studies on the collaborative economy in preparation of the Barcelona Strategic Tourism Plan for 2020. One of them analyses the impact of holiday letting on Barcelona's residential rental market. See: Barcelona City Council website, Strategic Plan 2020. Available at: <http://ajuntament.barcelona.cat/turisme/en/strategic-plan/documents>, accessed on 29/05/2017.

9 Projecte de Decret del Reglament de Turisme De Catalunya. Available at: <http://www.sharingespana.es/emailing/2016/docs/projecte.pdf>.

the Collaborative economy and to the emergence of collaborative economy businesses and the new businesses models. More details are indicated in Task 1 of this study.

The main **collaborative short-term rental platforms** available in Barcelona (and elsewhere in Europe) include: AirBnB, Wimdu, 9flats, HomeAway, HomeExchange, GuestToGuest and LoveHomeSwap. Other collaborative short-term rental platforms are specific to Barcelona, or particularly popular in Spain, including Rentalia, Idealista (including a section on holiday homes), Entreparticulares and Niumba.

AirBnB is the most used collaborative short-term rental platform worldwide and in Europe. The first AirBnB listing in Barcelona was published in 2009, and the platform opened its Barcelona office in 2012.¹⁰ As of May 2017, there were around 17,000 active AirBnB listings in Barcelona.¹¹ Data from AirBnB highlights that between 2012 and 2016, the number of Barcelona guests has grown almost 5 times. In fact, in 2016, just over 16,000 Barcelona hosts have welcomed 1.3 million guests.¹² The platform estimated its economic impact in Barcelona to EUR 1 billion (revenues for hosts plus expenditure of AirBnB guests) and EUR 1.3 billion for the Catalonia region itself.¹³ In addition, AirBnB estimates that 33% of guests would have not come to Barcelona without the platform's services, which resulted in EUR 860 million of guest spending.¹⁴

While AirBnB is the largest collaborative short-term rental platform in the city, other platforms are also present. Among European players, **Wimdu**, a German-born peer-to-peer accommodation rental platform, offers about 3,500 listings in Barcelona.¹⁵ **9flats**, a similar German platform, now merged with Wimdu, offers 1,400 listings.¹⁶ **HomeExchange**, a US-based home swapping platform ("Intercambio casas" in Spanish) reports 1,113 listings.¹⁷ The platform has been acquired in March 2017 by **GuestToGuest** a French home swapping platform that offers 5,700 listings in Barcelona.¹⁸ **LoveHomeSwap**, another US-based home swapping platform created in 2012 does not disaggregate results by city. In addition, hotel booking websites such as Booking.com or TripAdvisor also include peer-to-peer listings. For instance, TripAdvisor owns the collaborative short-term rental platforms HouseTrip and FlipKey.

In addition to the large EU and global collaborative short-term rental platforms, there are other, more local platforms offering short-term rental listings in Barcelona. **Rentalia** is a Spanish home rental website that displays 1,177 listings in Barcelona.¹⁹ **Idealista**, a Spanish peer-to-peer apartment rental website, has 9,218 Barcelona listings, including rooms and entire apartments.²⁰ The rental length depends on the apartment, but the website also lists over 2,200 holiday homes in the city²¹. **Niumba**, a Spanish peer-to-peer vacation rental website (acquired in 2013 by the U.S travel group TripAdvisor) publishes

10 AirBnB, Economic Impact Study, 2016. Available at: <https://www.airbnbcommunity.com/airbnb-community-boosts-barcelona-economy-by-e740-million/>, accessed on 08/06/2017.

11 Active listings are listings that are displayed on AirBnB.com on a given date.

12 AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

13 AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

14 AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

15 Snapshot of http://www.wimdu.es/search?search_geolocation=1940-barcelona as of 29/05/2017.

16 Snapshot of

https://www.9flats.com/es/searches?utf8=✓&mode=list&search%5Bcurrency%5D=GBP&search%5Bsort_by%5D=top_ranking&search%5Bradius%5D=25&search%5Bwoeid%5D=12693396&search%5Bgeo_region%5D=false&search%5Bpoint_of_interest%5D=false&search%5Bquery%5D=Barcelona%2C+Cataluña&search%5Bstart_date%5D=&search%5Bend_date%5D=&search%5Bnumber_of_beds%5D=2&number_of_adults=2&search%5Bnumber_of_children%5D=0&commit=Buscar as of 29/05/2017.

17 Snapshot of https://www.intercambiocasas.com/es/search/Barcelona_España as of 29/05/2017.

18 Information received from GuestToGuest on 24/04/2017.

19 Snapshot of <https://es.rentalia.com/alquiler-vacaciones-barcelona-barcelona/> as of 29/05/2017

20 Snapshot of <https://www.idealista.com/alquiler-habitacion/barcelona-barcelona/> and <https://www.idealista.com/alquiler-viviendas/barcelona-barcelona/> as of 29/05/2017.

21 Snapshot of <https://www.idealista.com/en/alquiler-vacacional/barcelona-provincia/municipios> as of 18/08/2017.

3,043 listings in Barcelona.²² Finally, **Entrepaticulares** is a popular Spanish classified ads website that publishes 56 rental listings in Barcelona.²³

In addition to collaborative short-term rental platforms, a growing number of businesses, such as Airtorted or Hostmaker, attempt to professionally manage peer-to-peer short-term rentals. These are property managers specifically dedicated to handling collaborative short-term rental properties. Peer providers let the business manage the room or property they want to let in exchange for a fee on the rental price. Hostmaker is the most relevant service of this type in Barcelona.²⁴

Also, hotel booking websites, such as **Booking.com** and **Tripadvisor**, offer peer-to-peer short-term rentals. For instance, Booking.com offers 1,189 listings, all of which are entire properties.²⁵ Tripadvisor offers 3,681 holiday rentals,²⁶ but its platforms like **HouseTrip** and **FlipKey** list up to 5,443 entire properties²⁷.

Finally, the **tourism and hospitality industry** participates in debates regarding collaborative short-term rental platforms and its role in short-term rentals across the capital, through representative associations (e.g. Confederación Española de Hoteles y Alojamientos Turísticos, Federación Española de Asociaciones de Viviendas y Apartamentos Turísticos, Chamber of property owners of Catalunya and Tarragona, Barcelona Hotel Association).

It is important to note that peer providers can simultaneously use more than one collaborative short-term rental platform to advertise their listing. This leads to a likely double counting of listings on such websites. Due to lack of data available on the number of double listings, the information presented in this case study regarding the total number of listings on collaborative short-term rental platforms (see sub-section 2.2) should be taken as an approximation.

1.2 Overview of economic development of the collaborative economy accommodation market

The **tourism market** has a key role in the Spanish economy, as the country is the third destination for tourists worldwide.²⁸ The total tourism contribution is estimated to 10.7% of the Spanish GNP.²⁹ In 2013, the tourism industry has created over 2.2 million jobs in Spain.³⁰

Barcelona is the Spanish city with the largest number of incoming tourists, and a key driver for the Spanish hospitality market. In 2013, Barcelona created 15.9% of total Spain hospitality employment. According to a 2013 study of the University of Girona, tourism in Barcelona generates between EUR 8 billion and 9.7 billion turnover per year. According to a 2015 study from the Barcelona official tourism office, visitors had an average daily expenditure of EUR 132.5 per person.³¹

22 Snapshot of <https://www.entrepaticulares.com/resultados-de-busqueda/?property-state=3411&location=barcelona-barcelona&status=alquiler&type=pisos-apartamentos> as of 29/05/2017.

23 Snapshot of <https://www.entrepaticulares.com/resultados-de-busqueda/?property-state=3411&location=barcelona-barcelona&status=alquiler&type=pisos-apartamentos> as of 29/05/2017.

24 Hostmaker website. Available at: <https://hostmaker.co/barcelona/>, accessed on 29/05/2017.

25 Snapshot of <https://www.booking.com/> as of 10/08/2017.

26 Snapshot of <https://www.tripadvisor.co.uk/> as of 10/08/2017.

27 Snapshot of <https://www.flipkey.com/> and <https://www.housetrip.com/> as of 09/08/2017.

28 Cohispania, 2016. Hospitality Market Report – Spain 2015.

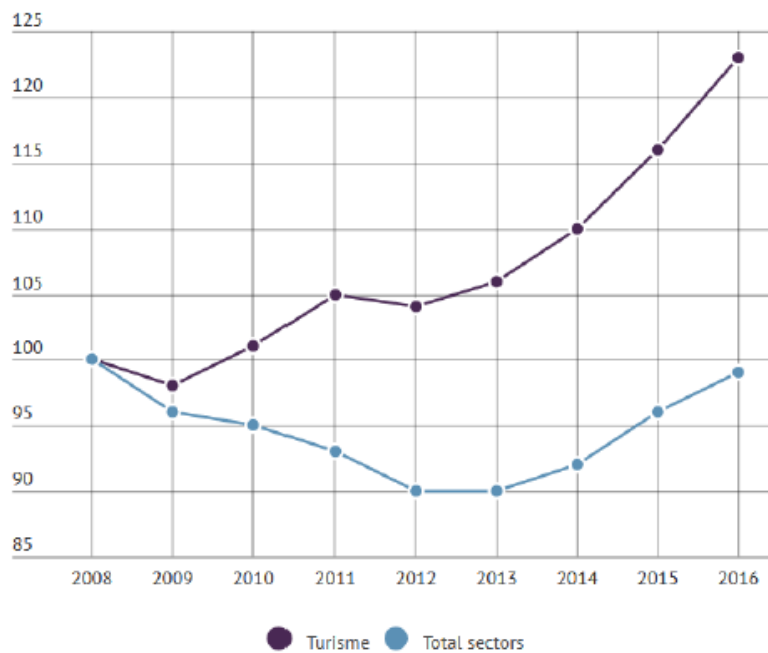
29 Barcelona Strategic Tourism Plan for 2020, p. 43.

30 Barcelona Strategic Tourism Plan for 2020, p. 43.

31 Sum of the average spending on accommodation and non-accommodation. Source: Barcelona City Council, Barcelona tourism activity report – 2015, p. 23.

The economic weight of Barcelona's tourism and hospitality sector has been growing importantly over the past ten years. The number of workstations (i.e. enterprises and people employed) dedicated to tourism has been consistently growing since 2008, whereas for the other sectors of the economy this has remained stable, as Figure 2 shows.

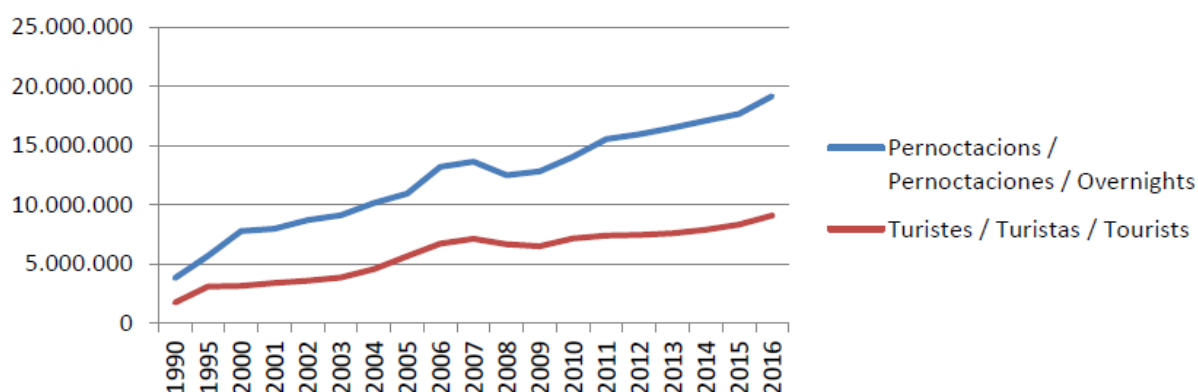
Figure 2: Evolution of tourism workstations in comparison with the other sectors in Barcelona



Source: Studies Department, Barcelona City Council based on Catalan Government data

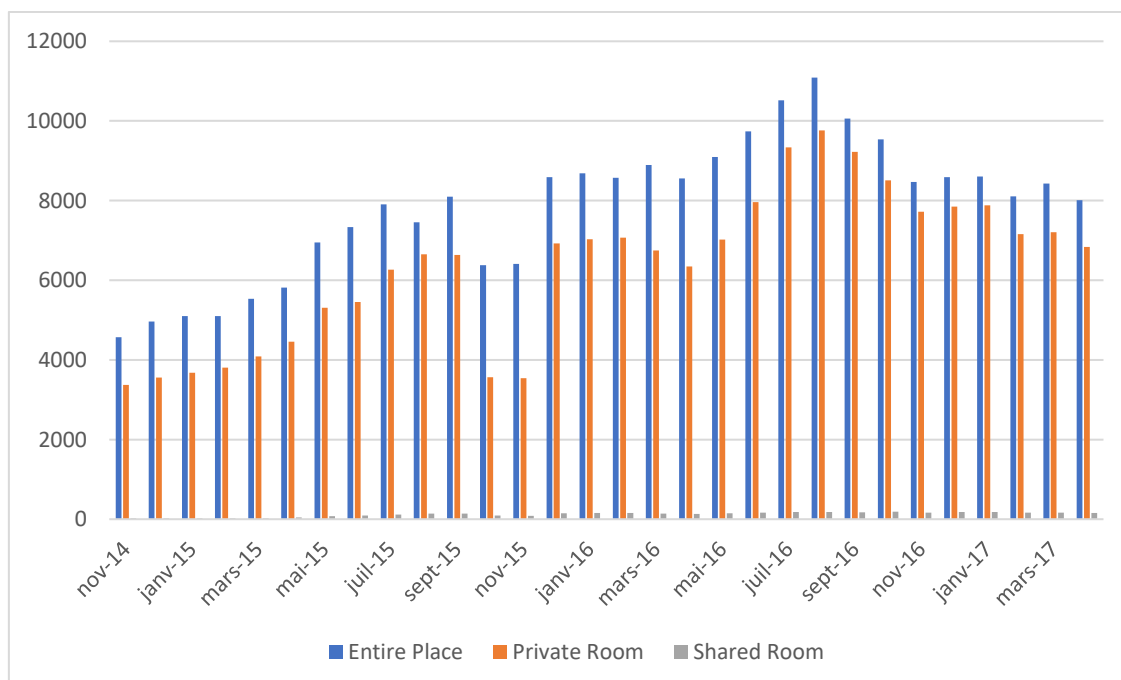
The number of tourists visiting Barcelona has been booming over the past fifteen years, as Figure 3 shows. Barcelona hotels have received 9.1 million tourists in 2016, which is an increase of 9.2% compared to 2015, and a nine-fold increase compared to 1990. The number of overnight stays in Barcelona hotels has also boomed from 15.5 million in 2011 to 19.2 million in 2016, as Figure 3 shows.³²

³² Data received from the Barcelona City Council on 29/05/2017.

Figure 3: Number of tourists and evolution in the past five years

Source: Gremi d'Hotels de Barcelona – Turisme de Barcelona

The **peer-to-peer short-term rental market** is not a new phenomenon in Barcelona, but, according to the Catalan Government, digital platforms have made it more visible.³³ There has been an important increase in the number of properties available for short-term rental. For instance, as mentioned in section 1.1, the number of AirBnB guests in Barcelona has been multiplied almost 5 times between 2012 and 2016.³⁴ Recent period also reports a considerable increase in the number of AirBnB active listings, with an upsurge of 53% between April 2015 and April 2016.³⁵ The number of AirBnB active listings varies between the seasons, as Figure 4 shows.

Figure 4: Total available listings on AirBnB, by type, Barcelona³⁶

Source: AirDNA

33 Interview with the Directorate General for Tourism of the Government of Catalonia, 30/05/2017.

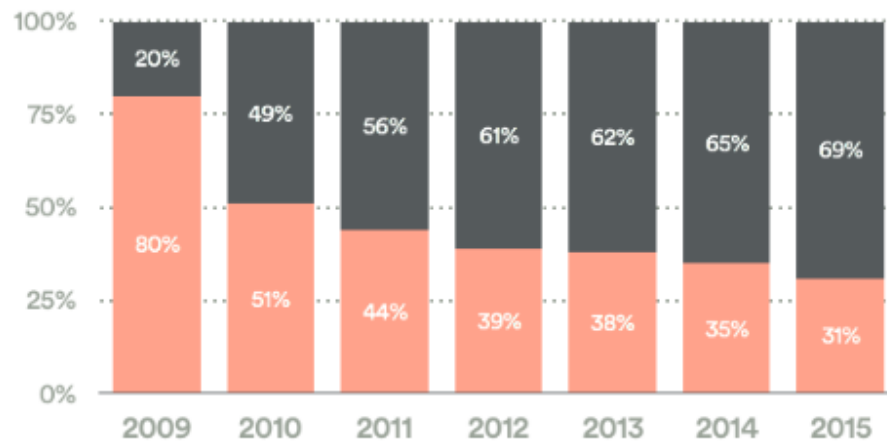
34 AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

35 AirDNA Market Report – Barcelona.

36 The count of AirbnB listings that were advertised for rent during the month or had a booked day in the month.

The expansion in short-term rentals in Barcelona has been increasingly concentrated towards its outskirts. In 2009, almost all bookings (80%) were in the central district of Ciutat Vella. That percentage has decreased consistently every year and in 2015, almost 70% of Airbnb bookings were for listings outside Ciutat Vella, as Figure 5 shows.

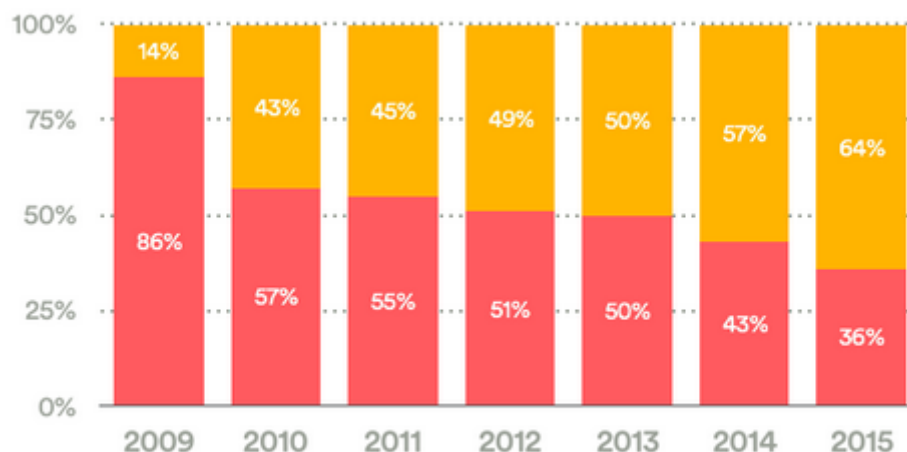
Figure 5: AirBnB booked listings (Ciutat Vella in pink, Barcelona excluding Ciutat Vella in grey), 2009-2015



Source: AirBnB

In 2015, the majority of Airbnb guests in Barcelona (64%) stayed in neighbourhoods outside Ciutat Vella. In 2009, this percentage was only 14%, as Figure 6 shows.

Figure 6: AirBnB total guests (Ciutat Vella in light blue, Barcelona excluding Ciutat Vella in dark blue), 2011-2016



Source: AirBnB

The trend is confirmed by HomeExchange, a collaborative short-term rental platform with 1,113 listings in Barcelona and about 4,000 in Spain. During an interview³⁷, HomeExchange outlined that most of their guests prefer staying in the outskirts of the city, given that 70% of Spanish users have kids, and they value space and nature more than proximity to the city centre.³⁸ Furthermore, this trend can be linked to the restrictive local policy adopted by the Municipality of Barcelona on Ciutat Vella. For instance, in 2015, the City Council has stopped issuing touristic licences for homes for tourist use, capping the number to 9,600. It will not renew the expiring licences in popular touristic areas, such as Ciutat Vella, so this number will decrease in the future, but the duration of such licenses was not specified. It should be noted that the City Council also put restrictions on the number of hotels, by prohibiting the building of new hotels in the city centre.³⁹

1.3 Overview of applicable local rules and regulatory developments

This sub-section provides a brief overview of the regulatory framework applied to collaborative short-term rental platforms and to peer-to-peer rentals in Barcelona. More detailed information regarding this framework is available in Task 1 reports. Note that, while the Task 1 report assesses all relevant regulation passed up to January 2017, this case study expands the timeline to June 2017. Because of the different timelines, some small differences in the regulatory information presented may exist.

The tourism accommodation sector in Barcelona is subject to both regional and city-level rules. While the Catalan Government sets minimum requirements, the Barcelona City Council can go beyond them and implement stricter rules.

At regional level, the Catalan Tourist Act of 2002 sets the rules applicable to short-term rentals.⁴⁰ The 2012 implementing decree⁴¹ has introduced the concept of "homes for tourist use", defined as private properties that are regularly rented out by their owners, directly or indirectly, to tourists on a seasonal basis. Only those short-term rentals which are offered at "homes for tourist use" are regulated and these need to be rented out in their entirety, on the other hand, sharing rooms in primary residences is not regulated; for example. Homes for touristic use for stays of less than 31 days have to comply with holiday-rental regulations in place in Catalonia, i.e.:⁴²

- Register in the Tourism Register of the Catalan Tourist Office;
- Apply for a tourism licence;
- Comply with health and safety laws;
- Be furnished;
- Issue invoices with VAT;
- Charge tourist tax;
- Inform the police of all stays within 24 hours of arrival;
- Provide a contact number in case of problem and make available a complaint form.

In addition to those requirements, it not allowed to rent out just rooms, which means that homeowners may not live in the property⁴³ (and thus can only rent out their secondary

37 Interview with HomeExchange, 07/04/2016.

38 HomeExchange (2013). My House is Yours. A Worldwide Study on Home Exchangers' Profiles and Motivation. Available at: <http://www.oits-isto.org/oits/files/resources/401.pdf>, accessed on 08/06/2017.

39 Interview with the Directorate for Tourism of the Barcelona City Council, 30/05/2017.

40 Law 13/2002 of 21 June on tourism in Catalonia.

41 Decree 159/2012 of December 2012.

42 Government of Catalonia, Viviendas de uso turístico. Available at:

http://empresa.gencat.cat/es/treb_departament/treb_preguntes_i_respostes/emo_turisme/emo_habitatges/, accessed on 07/06/2017.

43 (Article 66(2)) of Decree 159/2012 of December 2012,

residence, i.e. a residence which does not constitute their usual residence).⁴⁴ Homeowners must display the number of their tourism licence on the listing.

The Catalan Government is preparing a decree allowing homeowners to rent apartment rooms under the following conditions:⁴⁵

- They live in the apartment before and during the rental period;
- Rentals cannot last more than 31 days, and rooms can only be available for a maximum period of four months a year (non-consecutive);
- They rent out a maximum of two rooms per apartment;
- Municipalities determine in which city areas this activity can take place;
- Owners are responsible for collecting a tourism tax (EUR 0.65 in Barcelona and EUR 0.45 in the rest of Catalonia).

In cases where homeowners only rent two rooms per apartment, the decree does not require them to register their property in the Tourism Register and to have a tourism license. The decree is expected to be finalised and approved by the Catalan Parliament by the end of 2017.⁴⁶

At city-level, the Barcelona City Council has put some restrictions on the short-term rental market. The 2017 Special Plan on Tourism Accommodation implements a division by zones with different replacement/swapping rules:

- In Zone 1, where are located the most touristic neighbourhoods, new touristic establishments are not allowed and will not be replaced in case they cease their activity. A decrease of the number of licenses for homes for tourist use in this area can enable to have new licenses in Zone 3.
- In Zone 2, new touristic establishments are not allowed, but can be replaced provided they furnish the same number of beds. A decrease of the number of licenses for homes for tourist use in this area can enable to have new licenses in Zones 2 and 3.
- In Zone 3, it is allowed to open new touristic establishments and expand current ones under specific circumstances. A decrease of the number of licenses for homes for tourist use in this area, as well as Zone 1 and 2, can enable to have new licenses in Zone 3.
- In Zone 4, the number of touristic establishments is limited, and the establishment of homes for tourist use is not allowed.

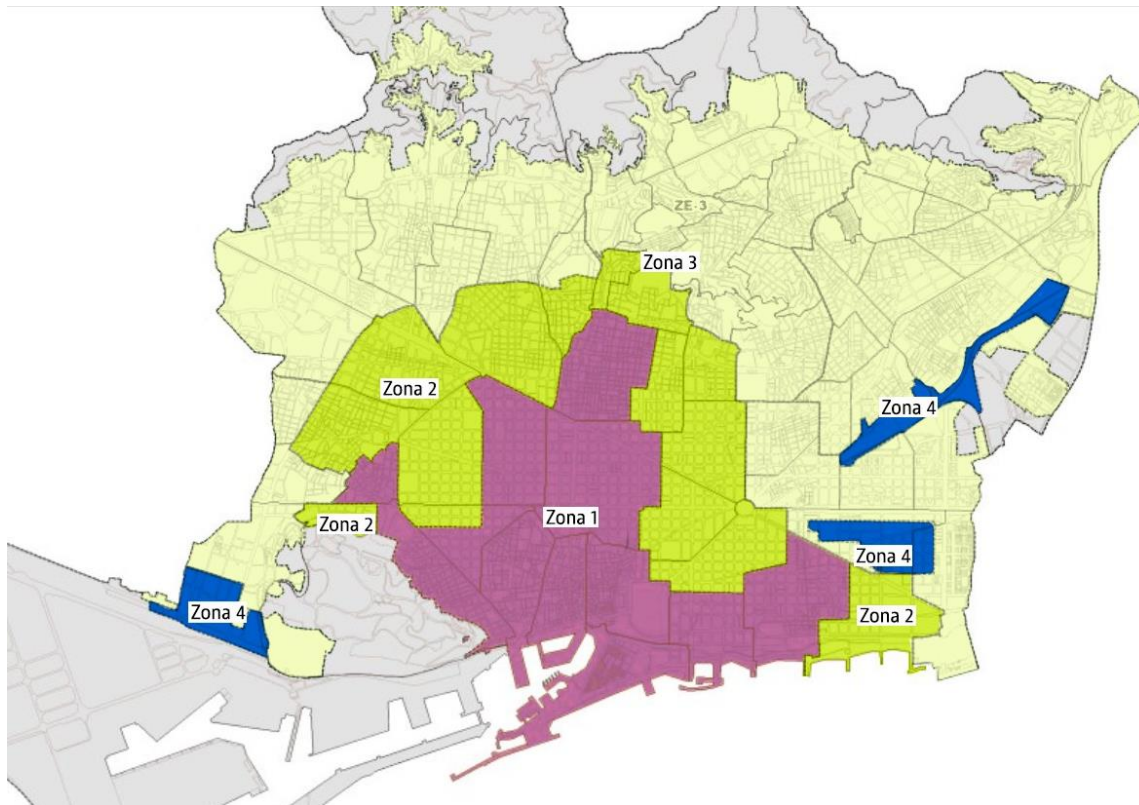
Figure 7 below shows the division by zone established by the Plan.

44 **Secondary residence** is defined as a residence that is “only used for a part of the year, in a seasonal, periodical or sporadic form, and that does not constitute the usual residence of one or more persons”. See the National Institute of Statistics definition, available at: http://www.ine.es/censo_accesible/en/glosario.html

45 There is no public official version of the draft decree for the moment, but the text can be found at: http://fevitur.com/images/20150730_Projecte_de_decret.pdf.

46 Interview with the Directorate General for Tourism of the Government of Catalonia, 30/05/2017.

Figure 7: Special Plan on Tourism Accommodation, division by zones



Source: Idealista.es

Over the summer 2016, the City Council has opened a website and a telephone line for residents to report properties to be illegally rented out to tourists, and has sent a letter to inhabitants to encourage them to denounce this practice.⁴⁷ A team of 20 inspectors (increased to 40 in June 2017), has been mobilised to check the properties reported.⁴⁸ In a press release from September 2016, the City Council said it has issued removal orders against 615 illegal flats during July and August 2016, and opened a total of 1,290 cases.⁴⁹ In case of non-compliance with the law, fines of up to EUR 600,000.⁵⁰

In August 2016, the Barcelona City Council fined two collaborative short-term rental platforms, Airbnb and HomeAway, EUR 60,000 each for advertising homes that were not registered in the Catalan Tourism Register and threatened to rise it to EUR 600,000 for not

47 TechCrunch, 19 September 2017, "Airbnb faces fresh crackdown in Barcelona as city council asks residents to report illegal rentals." Available at: <https://techcrunch.com/2016/09/19/airbnb-faces-fresh-crackdown-in-barcelona-as-city-council-asks-residents-to-report-illegal-rentals/>, accessed on 24/05/2017.

48 The Guardian, Friday 2 June, "Barcelona cracks down on AirBnB rentals with illegal apartment squads". Available at: <https://www.theguardian.com/technology/2017/jun/02/airbnb-faces-crackdown-on-illegal-apartment-rentals-in-barcelona>, accessed on 07/06/2017.

49 Barcelona City Council, Press release, 19 September 2016, "El pla de xoc d'habitatges d'ús turístic permet ordenar el tancament de 615 pisos il·legals durant l'estiu". Available at: <http://ajuntament.barcelona.cat/premsa/2016/09/19/el-pla-de-xoc-dhabitatges-dus-turistic-permet-ordenar-el-tancament-de-615-pisos-illegals-durant-lestiu/?hlst=huts>, accessed on 24/05/2017.

50 Barcelona City Council, Press release, 19 September 2016, "El pla de xoc d'habitatges d'ús turístic permet ordenar el tancament de 615 pisos il·legals durant l'estiu". Available at: <http://ajuntament.barcelona.cat/premsa/2016/09/19/el-pla-de-xoc-dhabitatges-dus-turistic-permet-ordenar-el-tancament-de-615-pisos-illegals-durant-lestiu/?hlst=huts>, accessed on 24/05/2017.

responding to requests to give details on the properties advertised without registration numbers.^{51,52}

As specified during the interview, the City Council has agreements with collaborative short-term rental platforms for them not to publish listings if they do not display the tourism licence – and are therefore illegal. Such collaborations have been established with Rentalia, HomeAway, Niumba, TripAdvisor and Booking.com. As of May 2017, AirBnB did not have such agreement with the City Council, and no information has been provided on the possibility for Airbnb to enter into such form of collaboration.⁵³

1.4 Summary of indicators

Table 1 presents an overview of indicators collected throughout the case study. Further information is provided in the following sections.

Table 1: Summary of indicators

No.	Indicators	Categories	Value
A1	Average market rental prices for long-term rentals (2016, monthly) ⁵⁴	One bedroom	EUR 714.54
		Two bedrooms	N/A
		Three bedrooms	EUR 1,150.16
		All categories	N/A
	Average market rental prices for short-term rentals (2016, monthly) ⁵⁵	AirBnB single room	EUR 1,003
		AirBnB shared room	N/A
		AirBnB entire home/apartment	EUR 3,593
		AirBnB all listing categories	EUR 2,555
		Hotel room	EUR 3,802
A2	Rooms or residences available for short-term rental ⁵⁶	Rooms	8,405
		Entire primary and secondary residences or touristic houses ⁵⁷	23,493
A3	Number of available residences (housing stock) ⁵⁸		675,780

51 Reuters, 11 August 2016, "Barcelona steps up crackdown on AirBnB, threatens further fines". Available at: <http://www.reuters.com/article/us-spain-airbnb-idUSKCN10M1YY>, accessed on 24/05/2017.

52 The Telegraph, 26 November 2016, "Barcelona to fine Airbnb and HomeAway EUR 600,000 each for offering "illegal accommodation"". Available at: <http://www.telegraph.co.uk/news/2016/11/24/barcelona-fine-airbnb-homeaway600000-offering-illegal-accommodation/>, accessed on 20/09/2017.

53 Interview with the Directorate for Tourism of the Barcelona City Council, 30/05/2017.

54 Average rental price for renting an entire property for long-term (more than 90 days) in the urban area considered. The value corresponds to the monthly average rent paid in the last reference year considered in this study.

55 Average rental price for renting a room or entire property on AirBnB or an average hotel on a short-term basis (less than 90 days) in the urban area considered. The value corresponds to the average daily rate on AirBnB or an average hotel multiplied by 30.4167 (in order to represent both months with 30/31 days). Note that the value does not consider potential discounts offered for renting a place for more than a day, even though such discounts are common on collaborative short-term rental platforms and in some hotels. The rooms considered in this indicator can accommodate up to two guests.

56 The sum of all listings, divided by rooms and entire places, found on the EU-level and local collaborative short-term rental platforms considered in this case study. Note that the values do not take into account the possibility of double listings, i.e. the same room or property being listed on multiple collaborative short-term rental platforms. The value, however, excludes listings in hotels, but it may include rooms in hostels or other type of touristic houses (e.g. B&Bs) that operate as businesses.

57 The information presented on collaborative short-term rental platforms does not allow us to distinguish between primary and secondary residences, or between residences (dwellings) and touristic houses. Where available, such distinctions for one or several collaborative short-term rental platforms are indicated in the text, while the indicator value corresponds to the sum of all entire listings available on the EU-level and local collaborative short-term rental platforms considered.

58 The total number of registered residences (dwellings) available in the urban area under study in the latest reference year considered. The number excludes all dwellings serving purposes other than residential ones.

No.	Indicators	Categories	Value
A4	Number of available properties for long-term rental (vacant dwellings) ⁵⁹		88,259
A5	Number of available properties offered through collaborative short-term rental platforms		49,175
A6	Short-term occupancy rate ⁶⁰	For short-term rentals (AirBnB)	59%
		For hotel rooms	80.7%
		Number of nights peer providers rent out their property (AirBnB - median)	28/year (AirBnB), 95/year (InsideAirBnB)
A7	Average length of stay ⁶¹	For short-term rentals (AirBnB)	4.2 nights
		For hotels or conventional accommodation providers	2.5 nights
A8	Income gained through short-term rental activities ⁶²	AirBnB providers (AirBnB, median)	EUR 6,984
		AirBnB providers (InsideAirBnB, average)	EUR 5,300
		Hotels or conventional accommodation providers	EUR 12,540
A9	Percentage of total provider revenues accounted for by short-term rental activities (AirBnB) ⁶³		N/A
B1	Number of tourists using collaborative short-term rental platforms	Total number of tourists on AirBnB (2016) ⁶⁴	1.3 million
		Total number of nights spent in AirBnB locations (2016) ⁶⁵	2.1 million
B2	Share of collaborative economy users out of tourists using conventional accommodation services	Nights spent (2016) ⁶⁶	15.66%
		Number of tourists (2016) ⁶⁷	11.89%

59 The number of vacant residences (dwellings) out of the total number of registered residences (dwellings) in the urban area under study in the latest reference year considered.

60 The occupancy rate refers to the percentage of nights a given property is rented out, out of the total number of nights that property is available. Note that, depending on local laws, properties listed on collaborative short-term rental platforms may be subject to a maximum limit of calendar days of availability. This aspect is considered in the indicator: the ratio refers to the actual occupancy rate (i.e. considering the number of days the listing is available), rather than a theoretical occupancy rate, which assumes availability up to the maximum limit permitted, or up to the maximum number of calendar days per year.

61 The value refers to the average monthly length of rental for a property, either on collaborative short-term rental platforms using AirBnB as a proxy, or in conventional accommodation providers such as hotels.

62 The value refers to the yearly median or average income gained from the rental of an average listing on collaborative short-term rental platforms using AirBnB as a proxy, or for an average room rented via a conventional accommodation provider. Note that for collaborative short-term platforms, various sources are indicated, so as to provide a more impartial value for this indicator.

63 The value refers to the percentage of annual income of the peer provider accounted for by revenues deriving from their collaborative short-term rental platform activities. Due to data availability, the indicator uses AirBnB statistics as a proxy for all collaborative short-term rental platforms in the urban area under study.

64 The value refers to the yearly number of individuals that used collaborative short-term rental platforms for accommodation, taking AirBnB as a proxy for the industry. Note that this is not the same as the total number of nights spent in AirBnB listings, since tourists may rent out properties as a group, rather than as individuals. The value also ignores the number of nights stayed per guest, which is considered in the indicator "Total number of nights spent in AirBnB locations".

65 The value refers to the total number of nights during which listings on the collaborative short-term rental platform AirBnB were rented during the latest year considered in this study. The value is computed using the following formula: $[(\text{total number of tourists using AirBnB listings as accommodation in the given year}) \times (\text{average length of stay in an AirBnB listing})] / (\text{average size of the group renting an AirBnB property})$.

66 The value refers to the ratio between the number of nights spent in AirBnB listings, taking AirBnB as a proxy for all collaborative short-term rental platforms activity, and the number of nights spent in conventional accommodation providers.

67 The value refers to the ratio between the number of tourists using AirBnB listings for their accommodation, taking AirBnB as a proxy for all collaborative short-term rental platforms activity, and the number of tourists using conventional accommodation providers.

2 Real estate and housing availability

This section gives an overview of the real estate market and housing availability in Barcelona, notably rental prices, number of available properties, and occupancy rates.

Due to the lack of data on other collaborative short-term rental platforms and given the comparative size of AirBnB's offer (17,000 active listings compared to about 9,000 on Idealista, its closest short-term rental competitor platform in Barcelona), AirBnB is used as a proxy for the collaborative economy market when no other data are available.

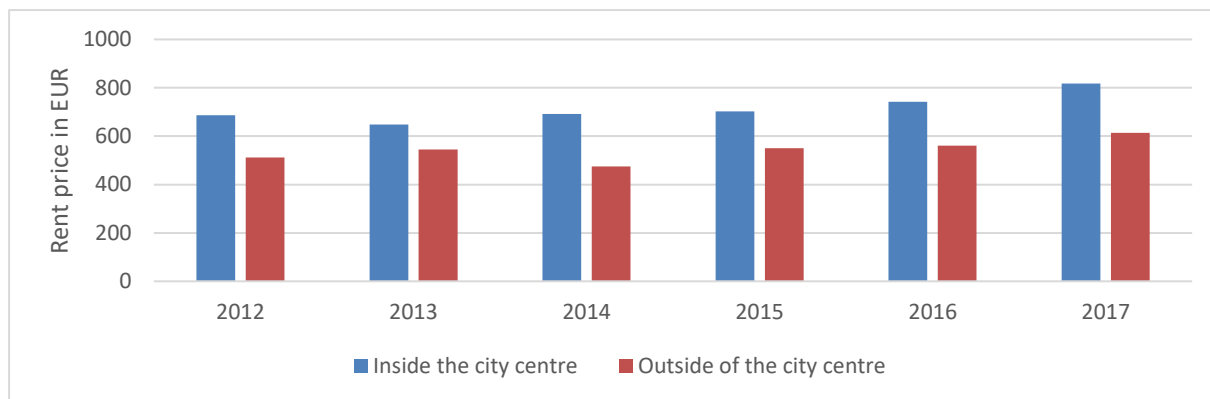
2.1 Overview of average rental market prices

Barcelona is the most expensive Spanish city in terms of long-term rent prices⁶⁸, and short- and long-term rental market prices have considerably increased over the past ten years. In 2016, **the average market price for long-term rentals**⁶⁹ was EUR 801.⁷⁰

Average market prices for long-term rentals in Barcelona have been growing sharply over the past years. Data from the Catalonia Statistics Institute (Idescat) shows that rents have increased by 18% in the last three years, as Figure 8 shows. This increase in rental prices accounts for the largest rent inflation in Spain, according to the Barcelona City Council. According to the City Council, the increase in vacation rentals that restrict the supply of accommodation has contributed to this increase in prices.⁷¹

See Figure 8, for an overview of the long-term rent of one bed-room apartments in Barcelona inside the city centre and outside of the city centre and Table 2 for the average monthly rents for long-term rentals in 2016.

Figure 8: Long-term rent of one bed-room apartments in Amsterdam (in EUR)



Source: <https://www.numbeo.com/cost-of-living/>

68 ABC, 17 January 2017, "Estas son las ciudades españolas más caras para alquilar una vivienda". Available at: http://www.abc.es/economia/inmobiliario/abci-estas-ciudades-espanolas-mas-caras-para-alquilar-vivienda-201701171334_noticia.html, accessed on 07/06/2017.

69 In this study, long-term rentals are understood to be rooms or entire properties rented out over a period exceeding any short-term threshold imposed by local laws (see definition of "short-term rental"). See sub-section 1.3 for a description of such thresholds. Where there is no such threshold, it is assumed to be a period longer than 120 days per year.

70 Idescat, Alquiler de viviendas. Rentas medias mensuales. Municipios con más de 70.000 habitantes. Available at: <http://www.idescat.cat/pub/?id=aec&n=731&lang=es>, accessed on 29/05/2017.

71 El País, 7 September 2016, "El 40% de los pisos turísticos de Barcelona son ilegales". Available at: http://ccaa.elpais.com/ccaa/2016/09/06/catalunya/1473172001_414770.html, accessed on 24/05/2017.

Table 2: Average monthly rents for long-term rentals in 2016

Categories	Average (EUR)
One bedroom	714.54
Two bedrooms	N/A
Three bedrooms	1,150.16

Source: Calculated using data from <https://www.numbeo.com/cost-of-living/>, computed as the average rent between one city centre and one outside city centre apartment

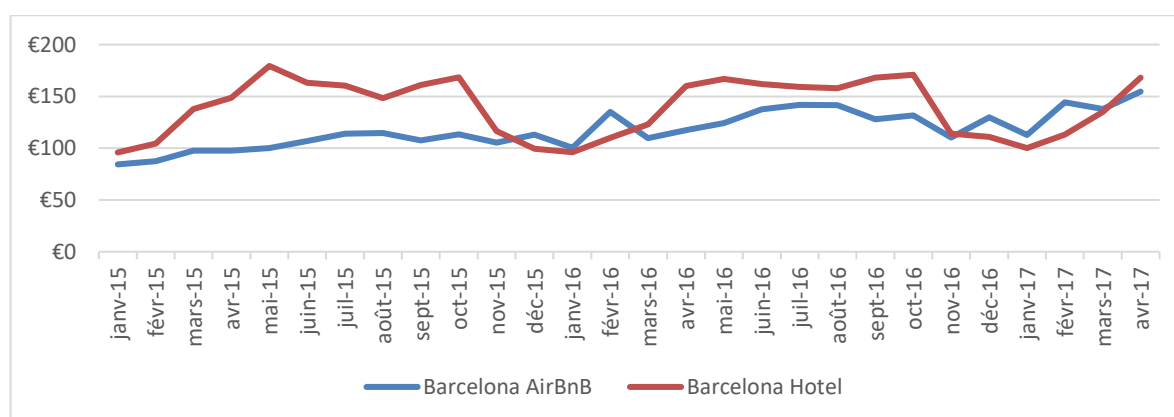
To illustrate the **average market price for short-term rentals** the AirBnB average daily rate is used as a proxy. The average cost for a night on AirBnB in 2016 was EUR 84.⁷² There are differences depending on the listing category, from about EUR 33 for a private room⁷³ to about EUR 164 for an entire place.⁷⁴

This study uses the price of AirBnB entire place average as a comparable alternative to hotel room (double-bed standard room). This alternative is considered comparable because it offers the same level of privacy (e.g. own key, own entrance and private bathroom facilities). Hotel rooms, in this study, are not compared with AirBnB listed rooms because the level of privacy is lower on AirBnB.

Table 3: Average daily and monthly rates for AirBnB listings and hotel rooms in 2016⁷⁵

Categories	Average daily (EUR)	Average monthly (EUR)
AirBnB all listing categories	84	2,555
AirBnB entire home/apartment	118	3,593
AirBnB single room	33	1,003
AirBnB shared room	N/A	N/A
Hotel room	125	3,802

Source: AirDNA data for AirBnB listings in 2016, calculated as an average of all monthly daily rates

Figure 9: Average daily rates: AirBnB entire place and hotel room

Source: AirDNA

72 Inside AirBnB – Barcelona. Available at: <http://insideairbnb.com/barcelona/#>, accessed on 24/05/2017.

73 AirDNA. USD converted into EUR with the USD/EUR exchange rate of 29/05/2017.

74 Inside AirBnB – Barcelona. Available at: <http://insideairbnb.com/barcelona/#>, accessed on 24/05/2017.

75 Average rental price for renting a room or entire property on AirBnB or an average hotel on a short-term basis (less than 90 days) in the urban area considered. The value corresponds to the average daily rate on AirBnB or an average hotel multiplied by 30.45 (in order to represent both months with 30/31 days). Note that the value does not consider potential discounts offered for renting a place for more than a day, even though such discounts are common on collaborative short-term rental platforms and in some hotels. The rooms considered in this indicator can accommodate up to two guests.

Figure 9 shows that the average daily rates of AirBnB entire place have increased steadily between 2014 and 2017. This trend can also be observed for hotels: data from PwC (2016) shows that the average day rate for hotels has increased of 6.2% between 2014 and 2015.⁷⁶

Table 4 shows an overview of average rental market prices for long- and short-term rentals in Barcelona. Reported to monthly rates, the average price for a property in short-term rental is 6.2 times higher than for a property in long-term rental.

Table 4: Summary overview of average rental market prices for long- and short-term rentals – Barcelona

No.	Indicators	Categories	Value (EUR)
A1	Average market rental prices for long-term rentals (2016, monthly) ⁷⁷	One bedroom	714.54
		Two bedrooms	N/A
		Three bedrooms	1,150.16
		All categories	N/A
	Average market rental prices for short-term rentals (2016, monthly) ⁷⁸	AirBnB single room	1,003
		AirBnB shared room	N/A
		AirBnB entire home/apartment	3,593
		AirBnB all listing categories	2,555
		Hotel room	3,802

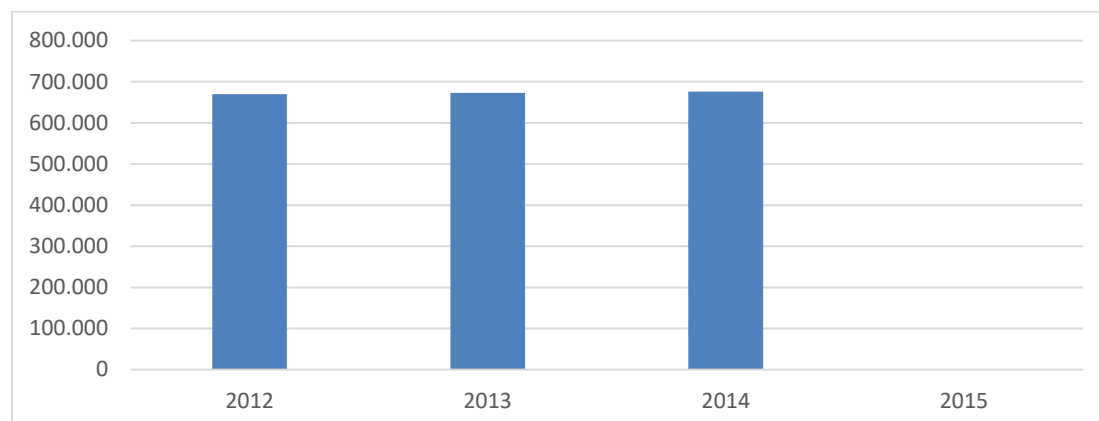
2.2 Overview of number of available properties

According to the Barcelona City Council, the situation of the housing market in Barcelona is difficult. Rising rents have made it expensive for residents to stay in the city centre, displacing population towards the outskirts. To counter this phenomenon, the urbanistic plan of Barcelona privileges the accommodation offer for residents, notably by prohibiting the building of new hotels in the city centre and capping the number of licences granted to homes for tourist use. In the figure below, the number of registered residences (housing stock) in Barcelona is given for the years 2012-2015 from EUROSTAT.

⁷⁶ PwC, 2016, Staying power – European cities hotel forecast for 2016 and 2017, p. 39.

⁷⁷ Average rental price for renting an entire property for long-term (more than 90 days) in the urban area considered. The value corresponds to the monthly average rent paid in the last reference year considered in this study.

⁷⁸ Average rental price for renting a room or entire property on AirBnB or an average hotel on a short-term basis (less than 90 days) in the urban area considered. The value corresponds to the average daily rate on AirBnB or an average hotel multiplied by 30. Note that the value does not consider potential discounts offered for renting a place for more than a day, even though such discounts are common on collaborative short-term rental platforms and in some hotels. The rooms considered in this indicator can accommodate up to two guests.

Figure 10: Number of registered residences (housing stock) in Barcelona

Source: Eurostat (urb_clivcon, urb_cpop1)

With regards to the **number of available properties for short-term rental in Barcelona**, the City Council of Barcelona estimates 14,857 homes for tourist use, including 9,600 registered (legal) homes for tourist use and 5,257 non-registered (illegal) homes for tourist use on AirBnB. Among those properties, the City Council estimates that 8,405 rooms are available for short-term rental in the city of Barcelona.⁷⁹

Another way to calculate this indicator is to aggregate the data from the main collaborative short-term rental platforms mentioned in section 1. Note that, as explained in sub-section 1.1, the counting does not make any provision for potential double listings, i.e. properties listed on more than one platform, and therefore double counted:

- AirBnB: 17,369 available listings⁸⁰, among which:
 - 8,405 rooms accounting for 48.4% of all listings;
 - 8,762 entire homes accounting for 50.4% of all listings;
 - 202 shared rooms, or 1.2% of all listings;
- Wimdu: 3,417 available listings, among which 299 private rooms and 1,356 apartments and "holiday homes";⁸¹
- 9flats: 1,419 available listings, among which 73 private rooms and 1,323 entire places;⁸²
- HomeAway: 5,051 available listings;⁸³
- HomeExchange (Intercambio casas): 1,113 available listings, all of which entire houses;⁸⁴
- GuestToGuest: 5,700 available listings, all of which home shares;⁸⁵
- Booking.com: 1,612 available listings, among which apartments and holiday homes;⁸⁶

79 Data from the City Council of Barcelona and Inside AirBnB.

80 AirDNA - Barcelona. Available at: <https://www.airdna.co/city/es/barcelona>, accessed on 24/05/2017.

81 Snapshot of http://www.wimdu.es/search?search_geolocation=1940-barcelona as of 29/05/2017.

82 Snapshot of

https://www.9flats.com/es/searches?utf8=%26amp;mode=list&search%5Bcurrency%5D=GBP&search%5Bsort_by%5D=top_ranking&search%5Bradius%5D=25&search%5Bwoeid%5D=12693396&search%5Bgeo_region%5D=false&search%5Bpoint_of_interest%5D=false&search%5Bquery%5D=Barcelona%2C+Catalu%C3%B1a&search%5Bstart_date%5D=&search%5Bend_date%5D=&search%5Bnumber_of_beds%5D=2&number_of_adults=2&search%5Bnumber_of_children%5D=0&commit=Buscar as of 29/05/2017.

83 Snapshot of <https://www.homeaway.es/results/espana/barcelona/region:988> as of 29/05/2017.

84 Snapshot of https://www.intercambiocasas.com/es/search/Barcelona_Espa%C3%B1a as of 29/05/2017.

85 Information received from GuesttoGuest on 24/04/2017.

86 Snapshot of https://www.booking.com/searchresults.en-gb.html?label=gen173nr-1FCAEoggJCAIhYSDNiBW5vcnVmaFCIAQGYAS7CAQp3aW5kb3dzIDEwyAEP2AEB6AEB-AELkgIBeagCAw&sid=3e9f60929e87cd6ada1152ed9584acea&sb=1&src=index&src_elem=sb&error_url=https%3A%2F%2Fwww.booking.com%2Findex.en-gb.html%3Flabel%3Dgen173nr-1FCAEoggJCAIhYSDNiBW5vcnVmaFCIAQGYAS7CAQp3aW5kb3dzIDEwyAEP2AEB6AEB-AELkgIBeagCAw%3Bsid%3D3e9f60929e87cd6ada1152ed9584acea%3Bsb_price_type%3Dtotal%26%3Bss=Barcelona&checkin_monthday=&che

- Rentalia: 1,177 available listings, all of which entire places⁸⁷
- Niumba: 3,043 available listings, all of which entire places;⁸⁸
- Entrepaticulares: 56 available listings, all of which entire places.⁸⁹

This study does not make a distinction between primary and secondary residences, and between residences and holiday homes. This is because there is no indication on the collaborative short-term rental platforms of the type of residence the listing is. Even though platforms may indicate whether the listing is an apartment, house or other (e.g. castle, boat, bungalow, etc), it is not clear whether they are the owner's primary or secondary residences. The same is true for rooms, which could be in a primary or secondary residence.

The total number of available properties for short-term rental in Barcelona, as the sum of the above, was of 39,957, as of May 2017. This number should be taken as an approximation. First, it is difficult to list all collaborative short-term rental platforms due to the size of the accommodation offer. Second, attention must be paid to the duplication of listings, as hosts may advertise the same room or property across multiple platforms. No adequate proxy as the percentage of duplicate listings could be found in Barcelona. The Barcelona City Council noted the same problem when counting platforms for its own research.⁹⁰

As a comparison, according to the City Council of Barcelona, in 2016, there were 408 hotels, i.e. 34,872 hotel rooms, i.e. 64,640 hotel beds.⁹¹ The Barcelona Hotel association estimates that the tourism accommodation offer is divided equally between hotels and collaborative economy listings. They estimated that approximately 20,000 apartments were available for short-term rental, which is the equivalent of approximately 70,000 beds.⁹²

The number of available short-term rental properties has been increasing over the past years, as mentioned in section 1.2 above. This increase can be explained as short-term rentals are more affordable for visitors as prices are significantly lower than hotels – about 3.8 times for an AirBnB room compared to a hotel room, as Table 3 shows. In addition, short-term rentals offer a higher return to landlords than long-term tenants, as the average rental price for short-term rental is much higher than for long-term – about 3 times as much for a room. A 2016 study published by the Barcelona City Council has calculated that homeowner revenues from short-term rentals for tourists are between 2.3 and four times higher than revenues from long-term rental, with some profit margins ranging between 7% and 13% for short-term rentals instead of 3%-4% for long-term rentals.⁹³

In 2016, there were 9,600 **registered residences “homes for tourist use” in the Catalan Tourist Register**.⁹⁴ Since 2010, when the register was established, a number of residences quadrupled, as Table 5 shows. As of 2015, new residences can no longer register, and the 2017 Special Plan on Tourism Accommodation establishes different replacement/swapping rules by zone, as explained in Section 1.3.

[ckin_month=&checkin_year=&checkout_monthday=&checkout_month=&checkout_year=&room1=A%2CA&no_rooms=1&group_adults=2&group_children=0](#), as of 29/09/2017.

87 Snapshot of <https://es.rentalia.com/alquiler-vacaciones-barcelona-barcelona/> as of 29/05/2017

88 Snapshot of <https://www.niumba.com/cataluna/barcelona> as of 29/05/2017

89 Snapshot of <https://www.entrepaticulares.com/resultados-de-busqueda/?property-state=3411&location=barcelona-barcelona&status=alquiler&type=pisos-apartamentos> as of 29/05/2017.

90 Interview with the Directorate for Tourism of the Barcelona City Council, 30/05/2017.

91 Data received from Barcelona City Council on 29/05/2016.

92 Interview with a Barcelona Hotel Association representative on 24/05/2017.

93 Barcelona City Council, 2016, *Impacte del lloguer vacacional en el mercat de lloguer residencial de Barcelona*.

94 Barcelona City Council website, Strategic Plan 2020, p. 42. Available at: <http://ajuntament.barcelona.cat/turisme/en/strategic-plan/documents>, accessed on 29/05/2017.

Table 5: Evolution of the number of registered “home for tourist use”

Year	Number of registered homes for tourist use
2010	2,349
2011	2,580
2012	4,730
2013	7,044
2014	9,606
2015	9,606

Source: Studies Department, Barcelona City Council based on Catalan Government data

Data from the Barcelona City Council suggests that 40% of the supply of homes for tourist use is not registered, and therefore illegal.⁹⁵ In January 2016, Inside AirBnB drew the same conclusion in an analysis of “entire homes/apartments” and “private rooms” that shows that 78% of listings have no license number displayed.⁹⁶ License numbers, however, are only needed in case providers rent out entire properties, and are not needed in case of room rentals.

The **number of available properties offered through collaborative short-term rental platforms** account to 49,175 (number of available properties plus 9,218 available rooms on *Idealista* that accounts for both short and long-term periods). This is the sum of all rooms and properties offered through the collaborative short-term rental platforms considered in this study. The figure generally excludes accommodation provided via traditional means, such as hotels, hostels or bed and breakfasts. However, in certain circumstances, hostel and bed and breakfasts managers list their properties on collaborative short-term platforms (e.g. AirBnB), and it is difficult to immediately distinguish between peers and professionals. While the figure for the number of available properties offered through collaborative short-term rental platforms tries to exclude professionals (e.g. by avoiding hotels/hostels from the counting on websites such as Booking.com, or by only considering “holiday rentals”, rather than “hotels” on TripAdvisor), it may nevertheless include some.

In 2011, there were 88,259 **available properties for long- and short-term rental** (vacant dwellings in Barcelona). Out of the 811,520 dwellings recorded in the latest official census from the Catalan Institute of Statistics, 84.3% were primary residences⁹⁷, 4.8% secondary residences⁹⁸, and **10.9% were vacant**.⁹⁹ In addition, in 2011 there were **205,912 primary residences rented out** (as opposed to residence owned) in Barcelona.¹⁰⁰ No distinction was made between proportion of residences rented out on short or long-term basis.

According to Barcelona City Council data, **the short-term rental market therefore represents 7.7% of the private housing stock rented out**.¹⁰¹ As noted in the Barcelona City Council study (2016), this share varies depending on the neighborhoods,

95 El País, 7 September 2016, “El 40% de los pisos turísticos de Barcelona son ilegales”. Available at: http://ccaa.elpais.com/ccaa/2016/09/06/catalunya/1473172001_414770.html, accessed on 24/05/2017.

96 Inside AirBnB – Barcelona. Available at: <http://insideairbnb.com/barcelona/#>, accessed on 29/05/2017.

97 **Primary residence** is defined as a residence that is “used all of the major part of the year as usual residence of one or more persons”. See the National Institute of Statistics definition, available at: http://www.ine.es/censo_accesible/en/glosario.html

98 **Secondary residence** is defined as a residence that is “only used for a part of the year, in a seasonal, periodical or sporadic form, and that does not constitute the usual residence of one or more persons”. See the National Institute of Statistics definition, available at: http://www.ine.es/censo_accesible/en/glosario.html

99 Barcelona City Council website, Número de viviendas según tipología. Available at:

<http://www.bcn.cat/estadistica/angles/dades/timm/censhab/evo/t1.htm>, accessed on 29/05/2017.

100 Barcelona City Council website, Número de viviendas principales según régimen de tenencia. Available at:

<http://www.bcn.cat/estadistica/angles/dades/timm/censhab/evo/t4.htm>, accessed on 29/05/2017.

101 Calculated as the ratio between the number of available properties for short-term rental and the number of primary residences rented out on a long-term basis (i.e. 205,912).

and can reach more than 25% in the area of Dreta del Eixample (27%) and Vila Olímpica (25.8%) and more than 10% in the neighbourhoods of the Sagrada Família (15.9%), Poble-Sec (15.2%), Diagonal Mar (15%), Antiga Esquerra de l'Eixample (14.8%), Poblenou (14.4%), Sant Antoni (13.7%), Gràcia (11.9%), Sant Pere (11.8%), Fort Pienc (11.6%) y Hostafrancs (11.6%).

Our study counts a higher number of available properties for short-term rental than the 2016 Barcelona City Council estimate (around 40,000 versus around 15,000). According to our results, the **short-term rental market would represent 19.4% of the private housing stock rented out**, which concludes that it considerably diverts housing stock away from long-term/residential use.¹⁰² However, it should be noted that due to unavailability of data our estimate is not discounted by the ration of duplicate listings and the possibility of apartments being advertised as entire listing or separate bedrooms at the same time.

Table 6: Summary overview of number of available properties – Barcelona

No.	Indicators	Number
A2	Number of rooms (Barcelona City Council)	8,405
	Number of rooms (AirBnB, Wimdu, 9flats)	8,707
	Number of entire primary and secondary residences (incl. investment flats) (sum of platforms)	23,493
	Number of available properties for short-term rental (Barcelona City Council)	14,857
	Number of available properties for short-term rental (sum of platforms)	39,957
A3	Number of registered residences (Barcelona City Council)	9,600
A3	Number of available residences (housing stock)	675,780
A4	Number of available properties for long and short-term rental (number of vacant dwellings)	88,259
A5	Number of available rooms/properties offered through online means (sum of platforms)	49,175

2.3 Overview of occupancy

In Barcelona, between 2001 and 2011 the under-occupancy rate has decreased by 12,512 dwellings, which is partly explained by the city's population rise.¹⁰³

With regards to the short-term occupancy rate for collaborative platforms, data is only available for AirBnB, which is used as a proxy for the broader sector. The **short-term occupancy rate for rooms/properties advertised online on AirBnB** is estimated by

¹⁰² Please note that this estimate does not take into account the duplication of listings.

¹⁰³ Barcelona City Council website, Numero de viviendas según tipología. Available at: <http://www.bcn.cat/estadistica/angles/dades/timm/censhab/evo/t1.htm>, accessed on 29/05/2017.

Inside AirBnB at 27.2%.¹⁰⁴ In comparison, in 2016, the occupancy rate of the Barcelona hotels was estimated at 75.1%.¹⁰⁵

According to the website AirDNA, occupancy highly varies depending on seasons. Between April 2016 and April 2017, the highest occupancy of AirBnB listings was recorded between July and October 2016 (80%) and the lowest in January 2017 (42%), as Figure 11 shows.¹⁰⁶

Figure 11: Occupancy rate AirBnB all listings and hotel rooms¹⁰⁷



Source: AirDNA

According to AirBnB, only three out of 10 AirBnB listings in Barcelona are rented for more than 90 days, which suggests that the majority of hosts are not professional accommodation providers. However, the high availability of AirBnB listings in Barcelona may imply the contrary. AirBnB hosts can set calendars with the numbers of days their listing is available for, and it can be assumed that the more listings are available, the more likely the host has a professional activity. According to Inside AirBnB, **71.7% of listings are available more than 90 days a year, and the average availability of listings is 224.8 days a year** (two thirds of the time).

Also, AirBnB estimated the **number of nights its peer providers rent out their short-term accommodation** to 66 nights/year.¹⁰⁸ InsideAirBnB estimates the same indicator to be 99 nights a year.¹⁰⁹

Finally, tourists using AirBnB stay on average **4.2 nights**. This is longer than the average length of stay recorded for hotels, which was of 2.5 nights in 2016.¹¹⁰ This supports the view

¹⁰⁴ Taken as a proxy for short-term occupancy rate for rooms/properties advertised online. Estimate based on the average length of stay configured for each city, multiplied by the estimated bookings for each listing over a period. Source: Inside AirBnB – Barcelona. Available at: <http://insideairbnb.com/barcelona/>, accessed on 29/05/2017.

¹⁰⁵ Gremi d'Hotels de Barcelona – Turisme de Barcelona. Source: data received from Barcelona City Council on 29/05/2017.

¹⁰⁶ Taken as occupancy rate of entire place listings with at least 1 booking in the month. Source: AirDNA - Barcelona. Available at: <https://www.airdna.co/city/es/barcelona>, accessed on 24/05/2017.

¹⁰⁷ Booked Listing Nights divided by Available Listing Nights.

¹⁰⁸ AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

¹⁰⁹ Inside AirBnB – Barcelona. Available at: <http://insideairbnb.com/barcelona/#>, accessed on 24/05/2017.

¹¹⁰ Gremi d'Hotels de Barcelona – Turisme de Barcelona. Source: data received from Barcelona City Council on 29/05/2017.

according to which the collaborative economy fosters the local economy in allowing people to stay longer in the place they visit, as will be explained in section 4.1 below.

Table 7 provides an overview of the findings presented in this section.

Table 7: Summary overview of occupancy – Barcelona

No.	Indicators	Value
A6	Short-term occupancy rate for rooms/properties advertised online (AirBnB)	59%
	Short-term occupancy rate for hotel rooms	80.7%
	Number of nights peer providers rent out their property (AirBnB - median)	66/per year (AirBnB) 99/per year (InsideAirBnB)
A7	Average length of short-term rentals (AirBnB)	4.2 nights
	Average length of stay of domestic and overseas overnights visits (hotels)	2.5 nights

3 Income and other tourism indicators

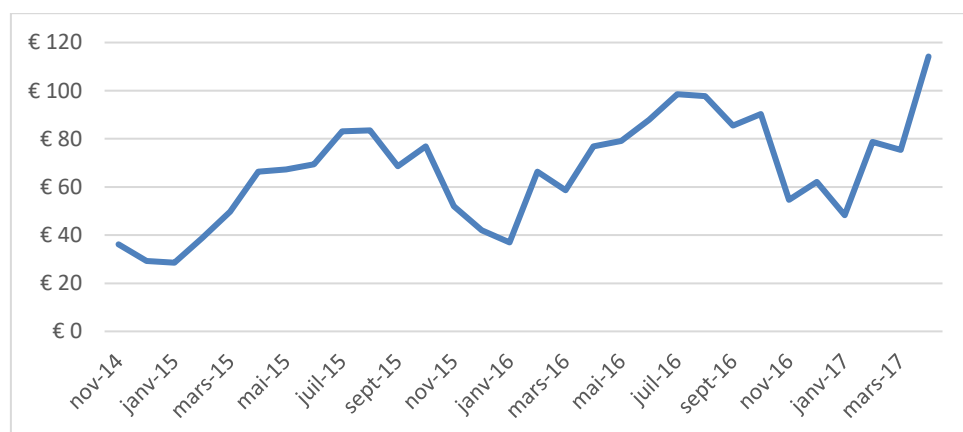
This section highlights the impact of the collaborative economy accommodation market on providers' income and tourism in the city. In doing so, it aims to estimate the broader economic potential of the sector.

3.1 Income indicators

The revenues that Barcelona accommodation providers earn from their collaborative economy activity form an important part of their income. This section uses the income earned by typical AirBnB host as a proxy, given the limited data availability on other collaborative short-term rental platforms.

In Barcelona, **income from short-term rental activities amount to EUR 5,300 per year for the typical peer provider (median)**, which is EUR 442 per month.¹¹¹ InsideAirBnB, however, puts the monthly revenue of a Barcelona host at EUR 582, or EUR 6,984 per year.¹¹² The City Council of Barcelona estimates even higher revenues, up to EUR 1,045 a month or EUR 12,540 a year.¹¹³ This accounts for more than half of the Catalan median yearly wage, which was of EUR 23,927 per year in 2014.¹¹⁴ Figure 12 shows the revenue earned by hosts per available room per month and as can be seen it varies depending on the season, and are higher during the summer period.

Figure 12: Revenue for Airbnb entire place¹¹⁵



Source: AirDNA

According to AirBnB, hosts in Barcelona typically use short-term rental revenues to cover household expenses: 60% of hosts in Barcelona state that such income helps them upkeep their property.¹¹⁶

Finally, most collaborative economy providers only rent out one property, suggesting they are not businesses. In May 2017, AirDNA estimated that 35% of hosts (or 2,243 out of 6,272) had only one listing on the platform.¹¹⁷ Inside Airbnb, however, estimates the

¹¹¹ AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

¹¹² Inside AirBnB – Barcelona. Available at: <http://insideairbnb.com/barcelona/#>, accessed on 24/05/2017.

¹¹³ Considering only recent and frequently booked listings on AirBnB, using Inside AirBnB data.

¹¹⁴ Idescat, Salario bruto anual, 2014. Available at: <http://www.idescat.cat/pub/?id=aec&n=397&lang=es>, accessed on 08/06/2017.

¹¹⁵ Revenue Per Available Room = Entire Place ADR * Occupancy. Differing from the hotel industry, we consider entire place listings as a "room".

¹¹⁶ AirBnB, Economic Impact Study, 2014. <https://www.airbnb.co.uk/press/news/new-study-airbnb-community-contributes-175-million-to-barcelona-s-economy>

¹¹⁷ AirDNA – Barcelona. Available at: <https://www.airdna.co/city/es/barcelona>, accessed on 24/05/2017.

percentage of hosts with multiple listings at 57.5% (9,986 out of 17,369) for the same period.¹¹⁸

Table 8 provides a brief overview of the income indicators identified in this section concerning AirBnB hosts in Barcelona.

Table 8: Summary overview of income indicators – Barcelona

No.	Indicators	Value (EUR)
A8	Average income gained through short-term rental activities (Barcelona City Council)	12,540/year
	Median income gained through short-term rental activities (AirBnB)	5,300/year
	Average income gained through short-term rental activities (Inside AirBnB)	6,984/year

3.2 Tourism indicators

The Barcelona City Council outlined that tourist demand has grown by 17% over the last five years, and estimates that **30 million tourists visit the city every year**.¹¹⁹ As mentioned in section 1 above, Barcelona has the sixth highest number of international arrivals in the EU with 6,769 million visitors in 2015.¹²⁰ The Barcelona City Council estimates that in 2015 there were 8,303 million tourists staying in hotels.¹²¹

Data on tourism arrivals and nights spent exists for AirBnB for the year 2016 for the city of Barcelona and is taken here as a proxy for the broader collaborative short-term rental sector. In Barcelona, the two indicators sought, are the following:

- a) 9,065,650 arrivals in hotels in 2016¹²², and 1.3 million arrivals in AirBnB locations in 2016.¹²³
- b) 19.16 million nights spent in hotels in 2016¹²⁴, and 2.1 million nights spent in AirBnB locations in 2016¹²⁵.

In 2016, 15.66% of incoming tourists in Barcelona (as share of tourists staying in traditional accommodation) stayed in properties available on AirBnB. The share of tourists using AirBnB has more than doubled since 2012 (7.3%).¹²⁶ In 2016, tourists spent 11.89% of nights in AirBnB listings (as share of traditional accommodation). Distinct factors may account for the customer's preferences when choosing between a hotel or an AirBnB accommodation. For instance, 87% of the AirBnB guests preferred the platform because it provides more services¹²⁷ and 76% because they wanted to explore a particular neighbourhood.¹²⁸

118 Inside AirBnB – Barcelona. Available at: <http://insideairbnb.com/barcelona/#>, accessed on 24/05/2017.

119 Barcelona City Council website, Strategic Plan 2020, p. 29. Available at: <http://ajuntament.barcelona.cat/turisme/en/strategic-plan/documents>, accessed on 29/05/2017.

120 Euromonitor International, Top 100 City Destinations Ranking 2017. Available at: <http://blog.euromonitor.com/2017/01/top-100-city-destination-ranking-2017.html>, accessed on 16/03/2017.

121 Barcelona Tourism Activity Report 2016, p. 2.

122 Barcelona Tourism Activity Report 2016, p. 2.

123 Number of guests staying in AirBnB in 2016. Source: AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

124 Barcelona Tourism Activity Report 2015, p. 33.

125 According to AirBnB (2017). The number of nights spent was calculated by multiplying the number of arrivals (1.3 million) by the average length of stay (4.2 days), and then dividing by the number of tourists per AirBnB property (2.6).

126 7,440,113 arrivals in hotels / 277,000 AirBnB guests in 2012. Sources: Barcelona Tourism Activity Report 2015, p. 33 and AirBnB, Economic Impact Study, 2016. Available at: <https://www.airbnb.com/citizens/airbnb-community-boosts-barcelona-economy-by-e740-million/>, accessed on 08/06/2017.

127 Wording used in the survey and there is no explanation as to what services it refers to.

128 AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

It should be noted that, despite the increased popularity of the short-term rental market over traditional accommodation, tourists in Barcelona still choose to stay in hotels as their first option.¹²⁹ In 2016, Barcelona hotels have received 9.1 million tourists, which is an upsurge of 9.2% compared to 2015. Hotel occupancy has increased by 7.5 percentage points since 2011, which can be explained as the supply of available beds in hotels has increased slower than the demand for overnight stays in the city (since 2015 it is forbidden to build hotels in the city centre, whereas the number of tourists visiting the city has constantly increased).¹³⁰ Data from PwC (2016) shows that between 2014 and 2015, the average day rate for hotels has also increased by 6.2%.¹³¹ It can be concluded that the growth in the number of tourists in Barcelona has also had a positive impact on the hotel sector.

As indicated in section 1.2 above, there is an increasing trend among short-term rental tourists (on AirBnB, but also on HomeExchange) to stay in peripheral areas, rather than the city centre. In addition, AirBnB estimates that 75% of its hosts are located outside the neighbourhood of Ciutat Vella, the city centre of Barcelona.¹³² This consistent with the long-term forecasts of the platform predicting that the largest growth in their tourist base over the coming years will be in suburban and rural areas.¹³³ Table 9 summarises the main tourism indicators retrieved in this section.

Table 9: Summary overview of tourism indicators – Barcelona

No.	Indicators	Value
B1	Total number of tourists using AirBnB in 2016	1.3 million
	Total number of tourists using AirBnB in 2012	277,000
	Total number of nights spent in AirBnB locations in 2016	2.1 million
B2	Ratio of tourists using AirBnB accommodation to tourists using traditional accommodation locations in 2016	15.66%
	Ratio of night spent in AirBnB locations to nights spent in traditional accommodation locations in 2016	11.89%

129 Barcelona Strategic Tourism Plan for 2020, p. 42.

130 Barcelona Tourism Activity Report 2015, p. 27.

131 PwC, 2016, Staying power – European cities hotel forecast for 2016 and 2017, p. 39.

132 AirBnB, Economic Impact Study, 2016. Available at: <https://www.airbnb-citizen.com/airbnb-community-boosts-barcelona-economy-by-e740-million/>, accessed on 08/06/2017.

133 Interview with AirBnB on 13/04/2017.

4 Impact on local communities

This section describes positive and negative implications of the collaborative economy accommodation offer on local communities.

4.1 Development of ancillary services

Barcelona and the Catalonia region are key drivers of the Spanish economy, and host many of the active Spanish businesses. According to Eurostat, the Catalonia region hosted 18.4% of all active enterprises in Spain in 2014. In addition, in 2014, 15.7% of Spanish enterprises in the accommodation and food sector were based in Catalonia.¹³⁴ The tourism sector is an important economic driver for the city of Barcelona. In 2016, the tourism and hospitality industry represented 90,555 workstations (enterprises and people employed) accounting for 8.8% of the total city employment.¹³⁵

One of the ways in which collaborative economy tourism contributes to local economic development can be through increased spending on local businesses. As described in section 1.2 and section 3.2 above, there is a growing tendency among collaborative economy guests to stay in peripheral areas. 64% of AirBnB guests stay outside the city centre of Barcelona, where is concentrated three quarters of the offer and, according to the platform, 39% of visitor spending in Barcelona occurs in the neighbourhood they stay in.¹³⁶ HomeExchange also noted that over half of their users are families, who prefer the suburbs over the city centre.¹³⁷ Given these trends, it is likely that guests using collaborative short-term rental platforms impact the quality and number of ancillary services where they stay.

According to AirBnB, in 2016, its guests spent EUR 860 million in local businesses. The platform noted that, in 2016, 36% of total tourist spending among AirBnB tourists in Barcelona went to food services and 19% to shopping.¹³⁸ On the other hand, HomeExchange, in a 2013 study surveying its users, found that 71% of home exchangers in Spain prepare their own food.¹³⁹

According to the AirBnB, in 2016 the platform has brought EUR 1.027 billion to the Barcelona economy. This is almost a tenfold increase compared to 2013, when the economic impact was estimated at EUR 128 million. AirBnB data shows indeed AirBnB guests stay 1.9 times longer and spend 2.3 times more money compared to typical tourists.¹⁴⁰

The Barcelona City Council, in a report dated from 2015, shows contradicting figures. Indeed, it estimates that Barcelona tourists staying overnight in hotels spend an average of EUR 99 per day, compared to EUR 78 for those staying on all types of accommodation.¹⁴¹

134 Eurostat (2017). Dataset: Business demography and high growth enterprise by NACE Rev. 2 and NUTS 3 regions [bd_hgnace2_r3]. Accessed on 29/05/2017.

135 Data received from the Barcelona City Council on 29/05/2017.

136 AirBnB, 2017, Overview of the AirBnB Community in Barcelona and Catalonia.

137 Interview with HomeExchange on 07/04/2017.

138 HomeExchange (2013). My House is Yours. A Worldwide Study on Home Exchangers' Profiles and Motivations. Available at: <http://www.oits-isto.org/oits/files/resources/401.pdf>

139 HomeExchange (2013). My House is Yours. A Worldwide Study on Home Exchangers' Profiles and Motivations. Available at: <http://www.oits-isto.org/oits/files/resources/401.pdf>

140 AirBnB, Economic Impact Study, 2014. <https://www.airbnb.co.uk/press/news/new-study-airbnb-community-contributes-175-million-to-barcelona-s-economy>

141 Including hotels, guesthouses, tourist apartments, hostels, homes for tourist use, campsites, rural accommodation. Source: Barcelona City Council, Barcelona tourism activity report – 2015, p. 23.

Also, the Barcelona Hotels association highlights that collaborative economy users are usually “budget travellers” who tend to spend less than the average tourist.¹⁴²

4.2 Housing supply changes

Based on figures from several collaborative short-term rental platforms as well as Barcelona City Council figures (see section 2.2 above), **the number of short-term rental properties has increased in the past few years**. Platforms such HomeExchange or AirBnB noted increase in the number of users and listings, despite the moratorium on short-term licenses imposed by the City Council. Therefore, this increase is likely to put pressure on the local housing supply, which has been confirmed by public authorities.¹⁴³

The study by the City Council shows that **out of 73 neighbourhoods the short-term accommodation offer concentrates in ten neighbourhoods** located in the most central two districts - Ciutat Vella and Eixample. The neighbourhood with the highest short-term rental offer are Dreta del Eixample with 2,294 homes for tourist use, legal or illegal, which represents 14% of the total Barcelona supply. The neighbourhoods of Gràcia, Sagrada Família, Antiga Esquerra de l'Eixample offer 1,000 homes for tourist use.

According to the Barcelona City Council, this concentration in the accommodation offer has led to important changes in the housing supply. The conversion of available properties into hotels and short-term rental units has led to a rise in rental prices that, along with some negative externalities for residents, contribute to the **displacement of local population outside the city centre**. For example, since 2007 the district of Ciutat Vella and Barri Gotic has lost 11% and 45% of its population respectively.

The City Council of Barcelona has taken measures to increase the long-term housing supply in those areas, as explained in section 1.3 above. Also, the spread of collaborative economy listings outside the city centre could help to deconcentrate the short-term rental offer outside the city centre.

4.3 Inhabitants' perception of collaborative short-term rental platforms

There are diverging views regarding the benefits and drawbacks of collaborative short-term rental platforms in Barcelona. Platforms tend to stress the advantages for residents. As already mentioned those are mainly economical. Renting short-term through platforms hosts can **increase the revenues and the flow of tourists** induces positive impacts for local economy.¹⁴⁴ It is also a way to develop the tourism and bring positive externalities to outer and remoted areas. AirBnB also points to the **social and cultural experience** provided by those peer-to-peer services.¹⁴⁵

An opinion survey in 2015 conducted on Barcelona residents showed that more than 91.5% believed that tourism was beneficial for the city. This share of respondents is lower in central areas. For example, merely 11.7% and 15% of citizens in districts of Ciutat Vella and Gràcia regarded tourism as beneficial activity.

On the other hand, representatives of the tourism and hospitality industry tend to emphasise **concerns** raised by the increase of short-term lettings in the city. This is the

142 Interview with a Barcelona Hotel representative.

143 Interview with the Directorate for Tourism of the Barcelona City Council, 30/05/2017.

144 See the AirBnB studies mentioned in the above sections.

145 AirBnB, Economic Impact Study, 2016. Available at: <https://www.airbnbncitizen.com/airbnb-community-boosts-barcelona-economy-by-e740-million/>, accessed on 08/06/2017.

case of the Barcelona Hotels association, which emphasised the **negative impact on housing availability and the peacefulness of neighbourhoods**.

According to the 2015 survey conducted by the City Council, 43% of Barcelona residents (61.6% in Ciutat Vella) considered tourism to be reaching its limits in terms of the city's capacity to provide services for tourists. The demand for reduction of tourism has been initiated by neighbourhood associations and social movements, and ever since it has been the reason for demonstrations in the city.¹⁴⁶

In 2016, the City Council has received about **2,750 complaints from Barcelona inhabitants that concerned homes for tourist use**.¹⁴⁷ According to the Barcelona City Council, these complaints related to the denunciation of illegal rentals, but also covered noise or disorder problems.¹⁴⁸

To those criticisms, AirBnB argues that the vast majority (90%) of AirBnB bookings in Barcelona are for groups of fewer than four people. In November 2016, AirBnB launched an initiative called Community Compact to promote responsible home sharing in Barcelona and provide information about their users to policymakers to respond to those concerns.¹⁴⁹

4.4 Impact on public services

There is very limited data available on the impact of the collaborative economy accommodation offer on public services. The City Council of Barcelona has detected a **crowdedness of public transport in touristic areas** (for instance, in the metro stations near tourist monuments such as Sagrada Familia or Park Güell).¹⁵⁰

In June 2017, the Barcelona City Council plans to release its new mobility plan that assesses the impact of tourists staying in homes for tourist use on public transports.¹⁵¹

146 El Diario, 28/01/2017, "Vecinos de Barcelona toman la Rambla para protestar contra la masificación turística". Available at: http://www.eldiario.es/catalunya/barcelona/Vecinos-Barcelona-Rambla-masificacion-turistica_0_606489470.html, accessed on 08/06/2017.

147 Data received from the Barcelona City Council on 29/05/2017.

148 Interview with the Directorate for Tourism of the Barcelona City Council, 30/05/2017.

149 AirBnB, Economic Impact Study, 2016. Available at: <https://www.airbnb-citizen.com/airbnb-community-boosts-barcelona-economy-by-e740-million/>, accessed on 08/06/2017.

150 Interview with the Directorate for Tourism of the Barcelona City Council, 30/05/2017.

151 Interview with the Directorate for Tourism of the Barcelona City Council, 30/05/2017.

5 Future developments

The collaborative economy in the tourism accommodation sector is growing in Barcelona and, for this reason, is increasingly under the focus of policy makers.

Despite noticeable economic benefits, the negative impact on the housing supply and local residents has been stressed by residents and hospitality industry associations. Several factors could nevertheless slow this phenomenon in the future. First, policies taken by the City Council of Barcelona encouraging long-term accommodation offer over short-term and tourist rentals. Second, collaborative economy increases the accommodation offer in peripheral areas moving tourism traffic from already crowded city centre and contributing to more balanced spread of tourists in the city. Finally, a growing dialogue between platforms and policy makers, as shown by the collaboration regarding illegal listings.

The Draft Decree on room rentals, due at the end of 2017, will further regulate short-term rentals. In 2015, the Government of Catalonia has created an interdepartmental commission for the study of the collaborative economy which is focusing on several themes (i.e. accommodation, consumer issues, taxation, etc.). Its final statement is expected to contribute to reducing regulatory uncertainty around the collaborative economy.¹⁵²

¹⁵² Interview with the Directorate General for Tourism of the Government of Catalonia, 30/05/2017.

6 ANNEX 1: List of interviewees

Organisation	Interview date
Barcelona Hotels Association	24/05/2017
Directorate General for Tourism of - Government of Catalonia	30/05/2017
Directorate for Tourism - Barcelona City Council	30/05/2017

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