

The Impacts of Home Sharing in Ireland





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Executive Summary

Airbnb hosts in Ireland have been welcoming guests into their homes since 2009. Over the past seven years, **Ireland residents have formed a vibrant Airbnb community**, sharing unique experiences with travellers from around the world.

The following report examines the impacts of Airbnb and its community in Ireland. **Economic and social impacts** have all been evaluated to understand how Airbnb fits into Irish society. The analysis is based on all travel to and within Ireland during the year-period from **October 2014 through September 2015**.

Airbnb's community in Ireland has significant positive economic, social, and environmental impacts.

Economic Impacts The economic impacts evaluated within this report include impacts to the economy at large, the tourism industry, neighbourhoods, and local households.

Social Impacts Diverse communities around the world are already seeing the personal social benefits of the sharing economy. These peer-to-peer transactions build community, foster cultural exchange, and strengthen empathy and understanding.

Environmental Impacts By helping residents share their homes, Airbnb promotes the efficient use of existing resources as well as a more environmentally sustainable way of travelling. This type of travel results in a significant reduction in energy consumption, water use and waste generation, compared to hotel stays, and also encourages sustainability awareness among both residents and visitors.

€202 million Economic impact
2,020 Jobs supported as a result of Airbnb host and guest spending

73% of hosts in Ireland said that hosting has positively affected their outlook on life

144,000 MMBtu or 3,700 Homes-worth of electricity saved

(Average annual energy consumption in a typical European home)

The Collaborative Economy

Airbnb and our community are part of the new **Collaborative Economy, a movement that enables people to access new economic opportunities, promotes entrepreneurship, strengthens communities and conserves resources**—all aspects of public life in which governments have invested significantly. It is fuelled by network technology and social tools, which are redefining the ways that goods and services are exchanged and created amongst citizens, businesses and governments.

Residents can share their underused assets with others willing to pay to use them; individuals can co-create, collaborate and participate, enabling affordable access to resources of all kinds. Not only is this movement **promoting sustainability** by encouraging the re-use of existing resources, it also thrives across all socio-economic levels, allowing ordinary people to benefit from new economic opportunities. **The Collaborative Economy is about how resources are used, how hospitality is exchanged, how residents are empowered, and how economic opportunities are more evenly distributed across diverse neighbourhoods.** These values are at the heart of who we are.

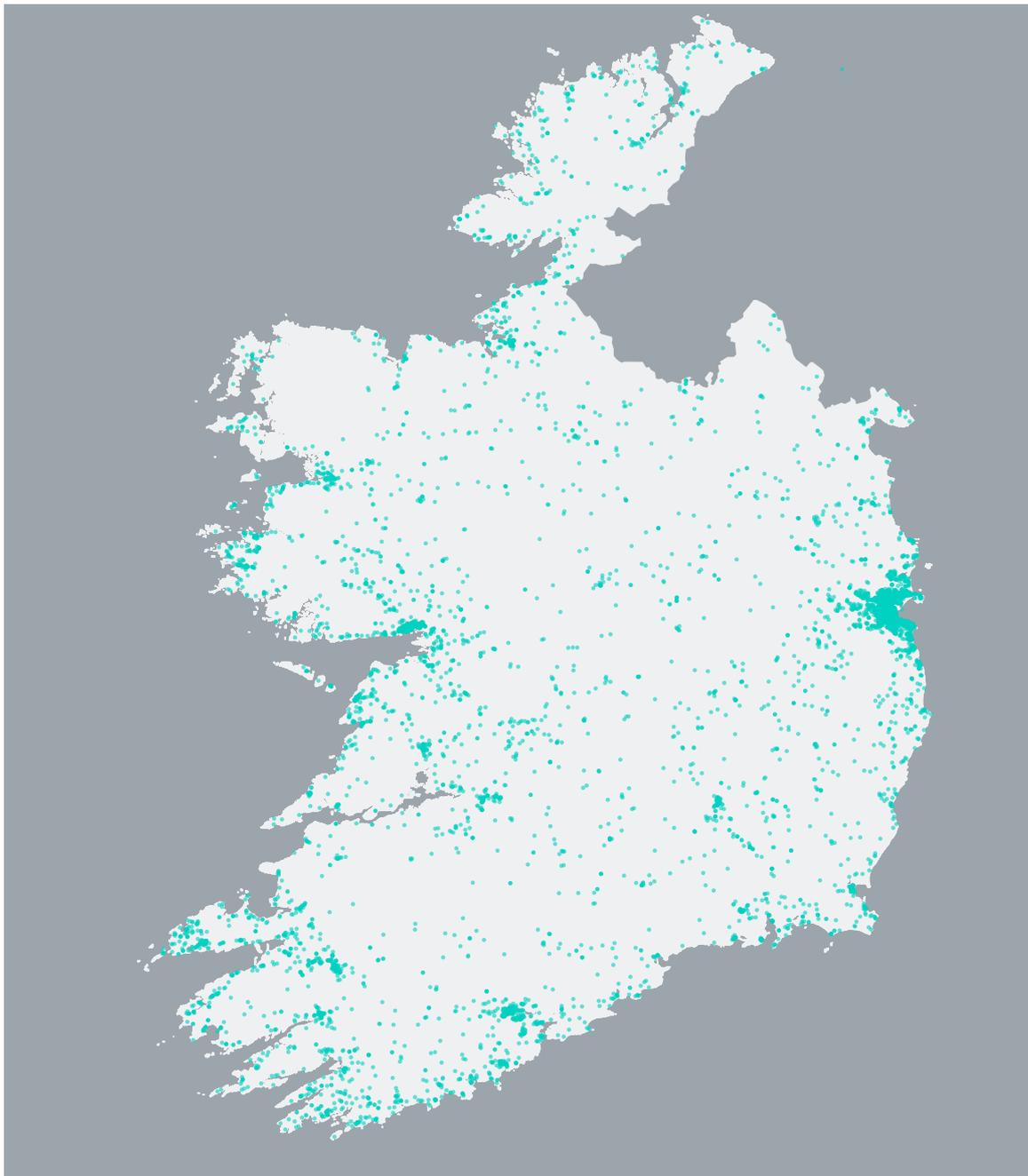
“ The sharing economy is going to change the way we live because the sharing economy offers society an opportunity to use stuff that we are wasting – such as an unused room – and, at a personal level, the incentive is income in a cash-strapped economy. Crucially, this potential income isn’t something new, it’s just **converting a wasted resource into cash**. What can be more attractive?

David McWilliams, davidmcwilliams.ie, August 17 2015

Airbnb's Community

Founded in August of 2008, Airbnb is a trusted community marketplace for people to list and book accommodations in more than **34,000 cities around the world**. Airbnb connects travellers to unique, local experiences, at any price point. On any given night, more than **140,000 people** from more than **190 countries** are travelling on Airbnb around the world.

AIRBNB PROPERTIES IN IRELAND



AIRBNB AT A GLANCE: IRELAND

7,200
Hosts

€ 29.8 M
Host Income

330,000
Inbound Guests

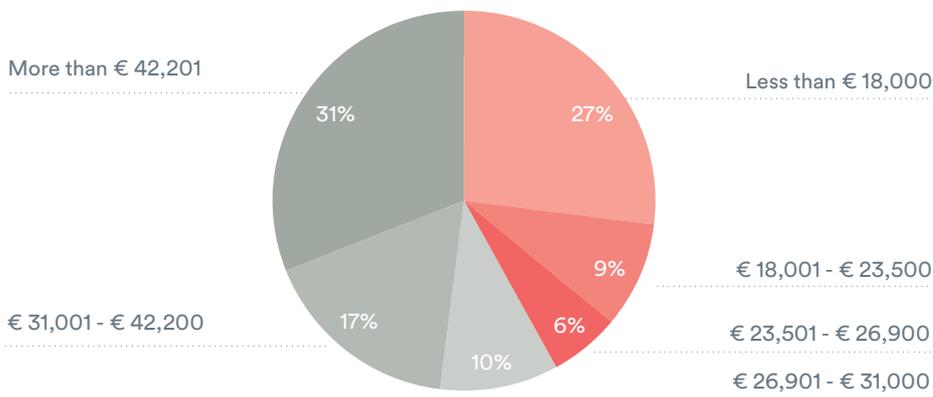
213,000
Outbound Guests

Note: Inbound guests are all visitors to a location. Outbound guests are residents who live in Ireland who have used Airbnb to travel. The two categories contain some overlap. Of Ireland outbound guests, 81% travelled internationally, 19% travelled domestically with Airbnb.

Airbnb's Host Community

Between October 2014 and September 2015, **7,200 Ireland hosts** welcomed guests into their homes. These hosts reflect the diverse communities across Ireland. **The average host is 44 years old, with a large percentage working in art, design or creative services. Fourteen percent of all hosts are retired.** Airbnb hosts are also highly educated—65 percent of hosts hold a college, university, graduate degree or higher.

HOST ANNUAL HOUSEHOLD INCOME



Airbnb hosts come from diverse income brackets.

(Ireland median household income € 26,900/year)

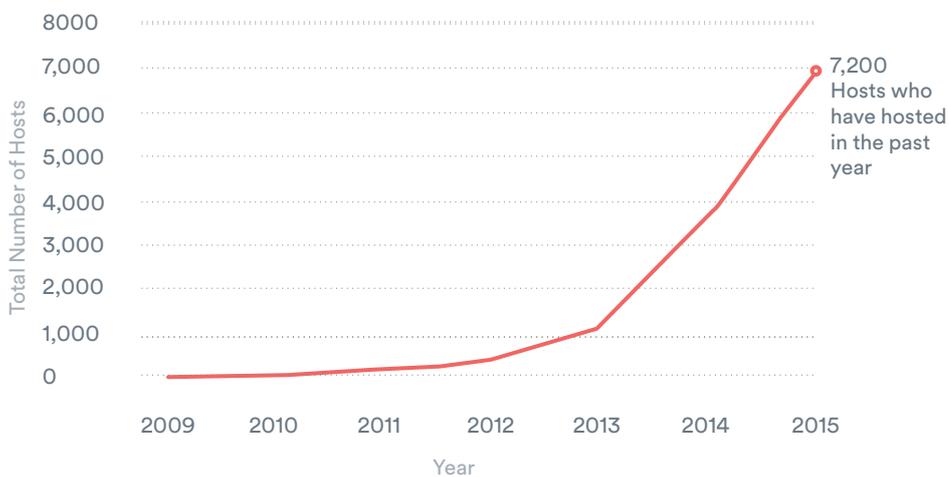
HOST OCCUPATIONS



22% of all hosts work in education and health services.

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

HOST GROWTH



Hosts in Ireland have more than doubled annually since 2010.

Note: Listing Growth includes all listings which have had a booking within the calendar-year period.

Source: Airbnb host survey, Airbnb bookings data.

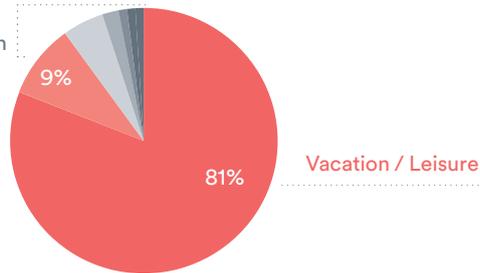
Airbnb's Guest Community

Since 2009, more than 400,000 guests have used Airbnb to explore Ireland. The number of guests using Airbnb has grown steadily since 2009, with visitation more than doubling each year.

GUEST REASONS FOR VISIT

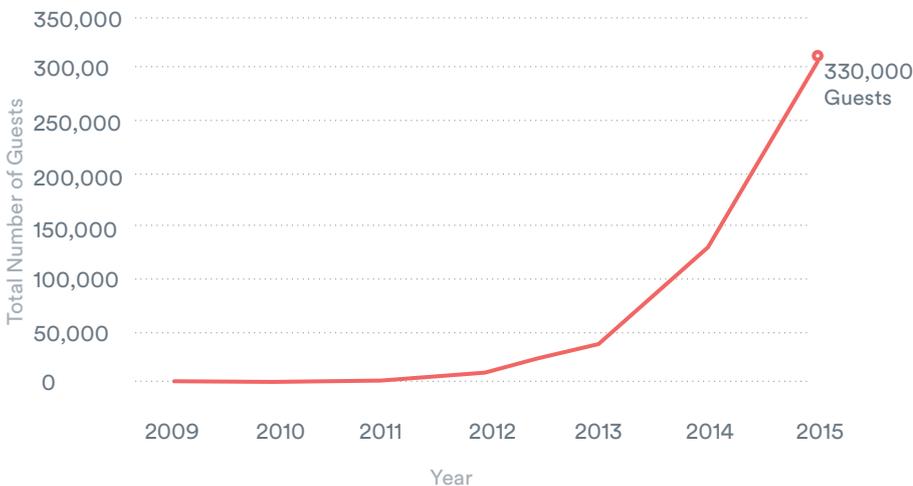
1% Relocation
1% Study
1% Job Hunting
2% Conference / Convention
5% Business

Friends / Family



90 percent of guests in Ireland visited for vacation and leisure or to see friends and family.

GUEST GROWTH



Since 2009, 419,000 guests have visited Ireland with Airbnb.

83%

of Airbnb guests are looking to “live like a local”

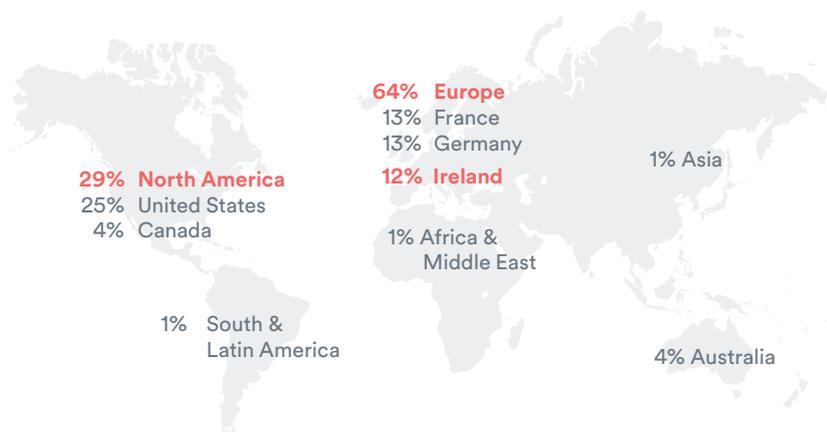
75%

of Airbnb guests are looking to explore a specific neighbourhood

52%

of all trips involve families travelling with partners, or children

GUEST ORIGIN



64 percent of Airbnb guests in Ireland are from Europe.

Economic Impacts

Airbnb's business model has far reaching economic impacts that benefit a) the country overall, b) the tourism industry, c) local businesses and d) local households.

Airbnb helps bring one of the world's most economically powerful industries right to the front door of local residents. In the process, visitors are connected to a more diverse and affordable range of experiences, local households earn additional income, and spending is distributed throughout the city among businesses and neighbourhoods that do not traditionally benefit from tourism.



Overall Economic Impact

Host income and visitors' daytime spending has a significant economic impact. The following figures account for all direct, indirect and induced spending in Ireland.

€202 million

Economic impact

2,020

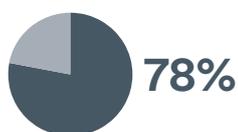
Jobs supported

“ Airbnb is one of the biggest success stories of the emerging ‘shared economy’ – which meets the needs of a new generation of consumers – by bringing fresh, innovative ideas to the global travel marketplace

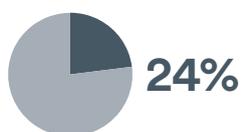
Barry O’Leary, CEO IDA Ireland, April 4 2014

Impacts to the Tourism Industry

Airbnb attracts **visitors, who are able to stay longer and spend more as a result of the new accommodation option. Airbnb guests are also more likely to return to Ireland**, fundamentally strengthening the tourism industry and creating additional opportunities for growth without requiring new investment or infrastructure on the part of the country. The majority of guests are looking for local experiences.



of guests reported that their Airbnb experience made them even more likely to return to the city they visited



of Airbnb guests would not have gone on their trip, or would not have stayed as long without Airbnb



of guests would recommend the Airbnb property that they stayed in to friends and family

€ 561

Total spending per visitor per trip

€ 159	+	€ 36	=	€ 194	
Daily average daytime spending per visitor		Daily accommodation spending per visitor (see note below)		Total spending per visitor per day	
				×	2.9
					Average nights per stay in single Airbnb

Airbnb visitors contribute significantly to Ireland's tourism industry.

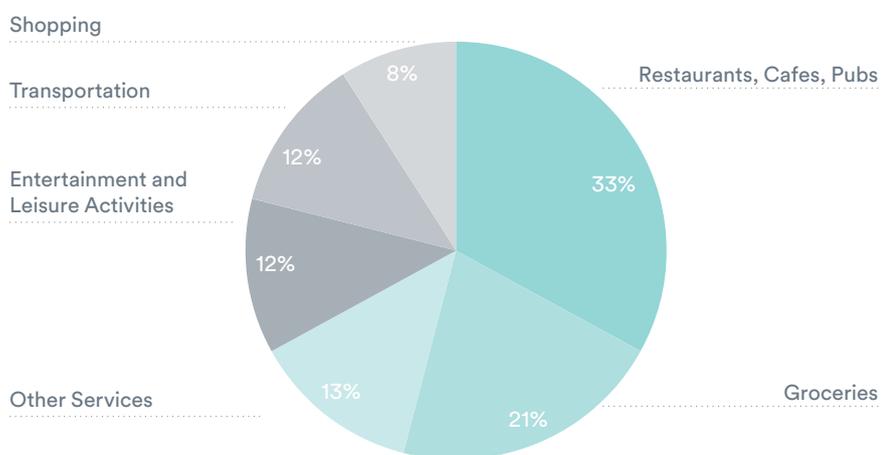
83%

of guests saved money on their trip by using Airbnb

60%

of hosts who saved money using Airbnb spent that money on shopping, food, and entertainment during their trip

GUEST DAYTIME SPENDING CATEGORIES



Note: Airbnb guest expenditure values are not compared to national values as guest trips to Ireland may involve multiple destinations, whereas Airbnb guest spending considers only a single trip and single destination.

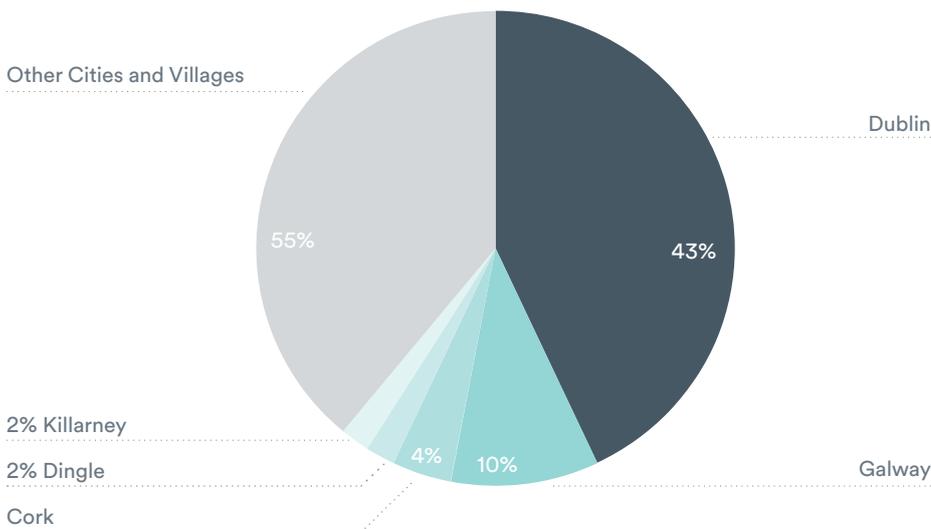
Source: Airbnb guest survey.

Impacts across Cities

Airbnb distributes economic impacts to cities and neighbourhoods that have not traditionally benefitted from tourism spending. With **Airbnb properties across more than 500 cities and villages spread across Ireland**, Airbnb visitors are staying in and exploring places they might never have otherwise visited.

Of all Airbnb guests, 10 percent said they were visiting for a specific festival or event. Saint Patrick's Day, weddings, and various art and folk festivals were the most common events named as reasons for visiting.

GUEST DESTINATIONS



Airbnb guests visited 500 cities and villages across all Irish counties.

81%

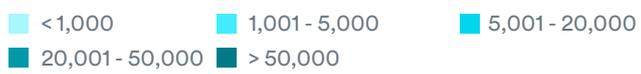
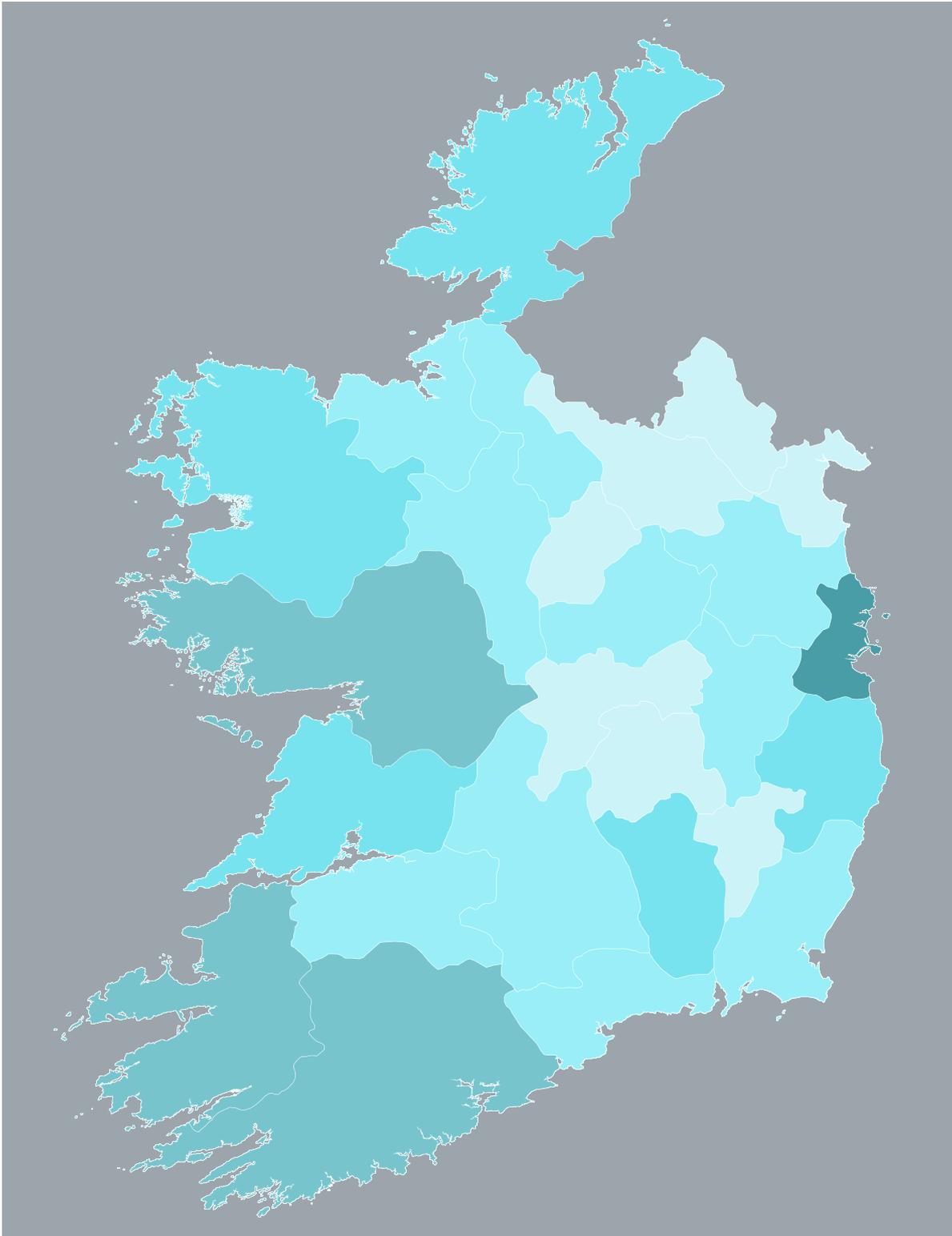
of guests said they were looking to experience local cultural events

10%

of guests visited Ireland because of a specific event or festival

Airbnb guests are very interested in having local and cultural experiences.

AIRBNB GUESTS IN IRELAND



Impact on Residents and Households

Airbnb helps many residents across Ireland pay for regular living expenses and provides some additional spending money. The **typical Airbnb host in Ireland earns € 2,600 per year**, renting out space in their home about 40 nights per year. This **modest income has helped 59 percent of hosts stay in their homes.**

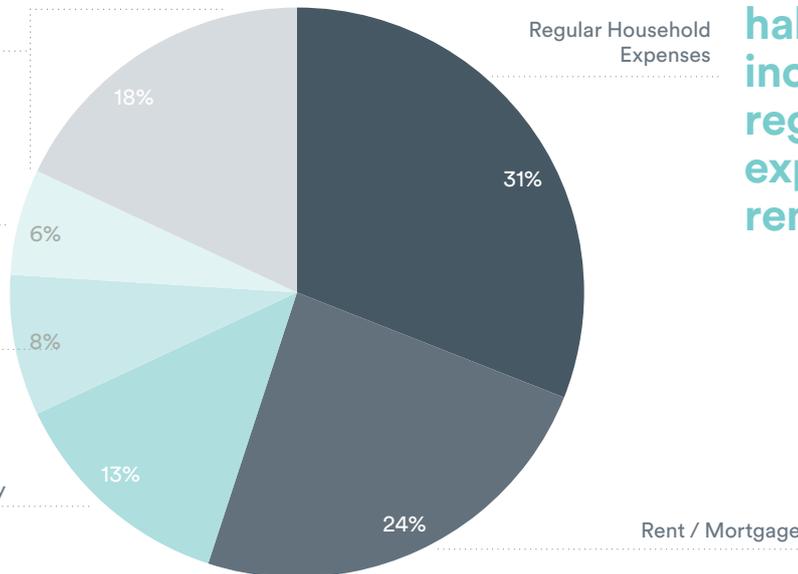
HOSTING INCOME USE

4% Long-term Savings
4% Cleaners
10% Other

Emergency Fund

Vacation

Extra Spending Money



Hosts use more than half of their Airbnb income to pay for regular household expenses, including rent and mortgage.

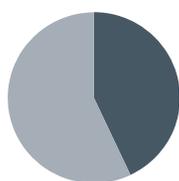
“ I love hosting people from all over the world and I absolutely love the peace of mind that extra income gives me.

Ann F., Cork Airbnb Host

“ As a pensioner I use the money for holidays, some small savings, repairs and maintenance for the property, and books!

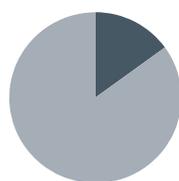
Dublin Airbnb Host

Airbnb also enables hosts to afford to take professional chances and pursue their dreams. Thirty-four percent say that income from hosting has allowed them to support themselves while freelancing or starting a new business or project.



43%

of hosts are freelancers, entrepreneurs or self-employed



15%

of hosts say that Airbnb income has helped them to start a new business.

“ Airbnb has meant that there was still money coming in whilst both my husband and I created jobs for ourselves, to get us off the dole.

Erron S., Rural Airbnb Host

“ I recently started a new architecture practice. Income from Airbnb takes the pressure off a bit.

Dublin Airbnb Host

“ [We use our Airbnb income to support us] as we are developing our place here as an education centre. This lets us run workshops and educate people on sustainable living.

Kerry Airbnb Host

City Case Study: Dublin

COMMUNITY OVERVIEW (OCTOBER 2014 - SEPTEMBER 2015)

2,960 Hosts

143,000 Inbound guests

€ 17.3 M Hosting income earned by Dublin hosts

€ 96.4M Direct guest spending in Dublin

€ 865

Total spending per visitor per trip

€ 206	+	€ 40	=	€ 246	
Daily average daytime spending per visitor		Daily accommodation spending per visitor		Total spending per visitor per day	
				×	3.5
					Average nights per stay in single Airbnb

Airbnb visitors contribute significantly to Dublin's tourism industry.

83%

of Dublin hosts share space in the home in which they live

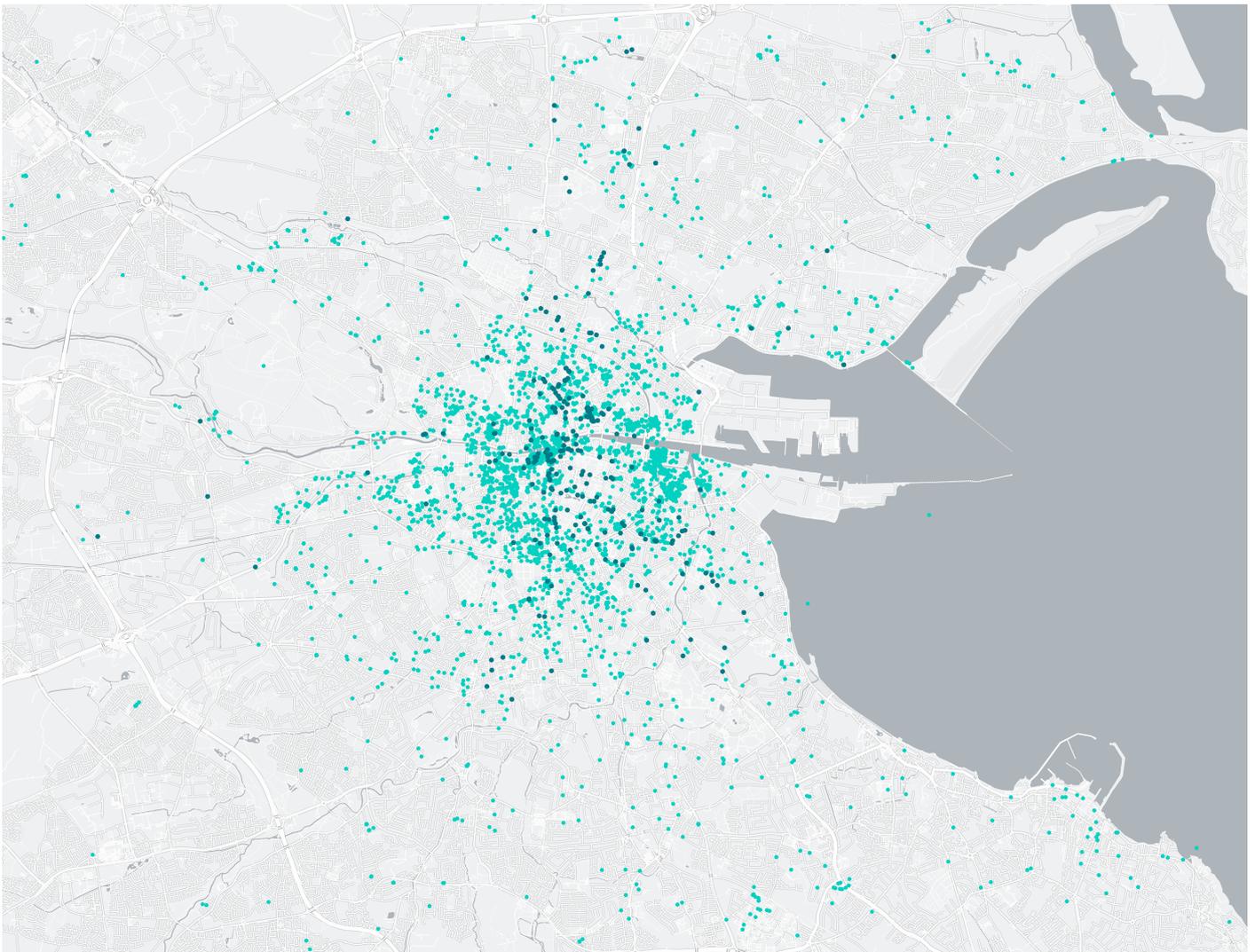
23%

of Dublin hosts work in the tech industry

71%

of Dublin hosts are originally from Ireland

AIRBNB VISITATION BY NEIGHBOURHOOD VS. HOTELS



■ Airbnb Properties ■ Hotels

City Case Study: Galway

COMMUNITY OVERVIEW (OCTOBER 2014 - SEPTEMBER 2015)

470 Hosts

32,000 Inbound guests

€ 2.2 M Hosting income earned by Galway hosts

€ 9.6 M Direct guest spending in Galway

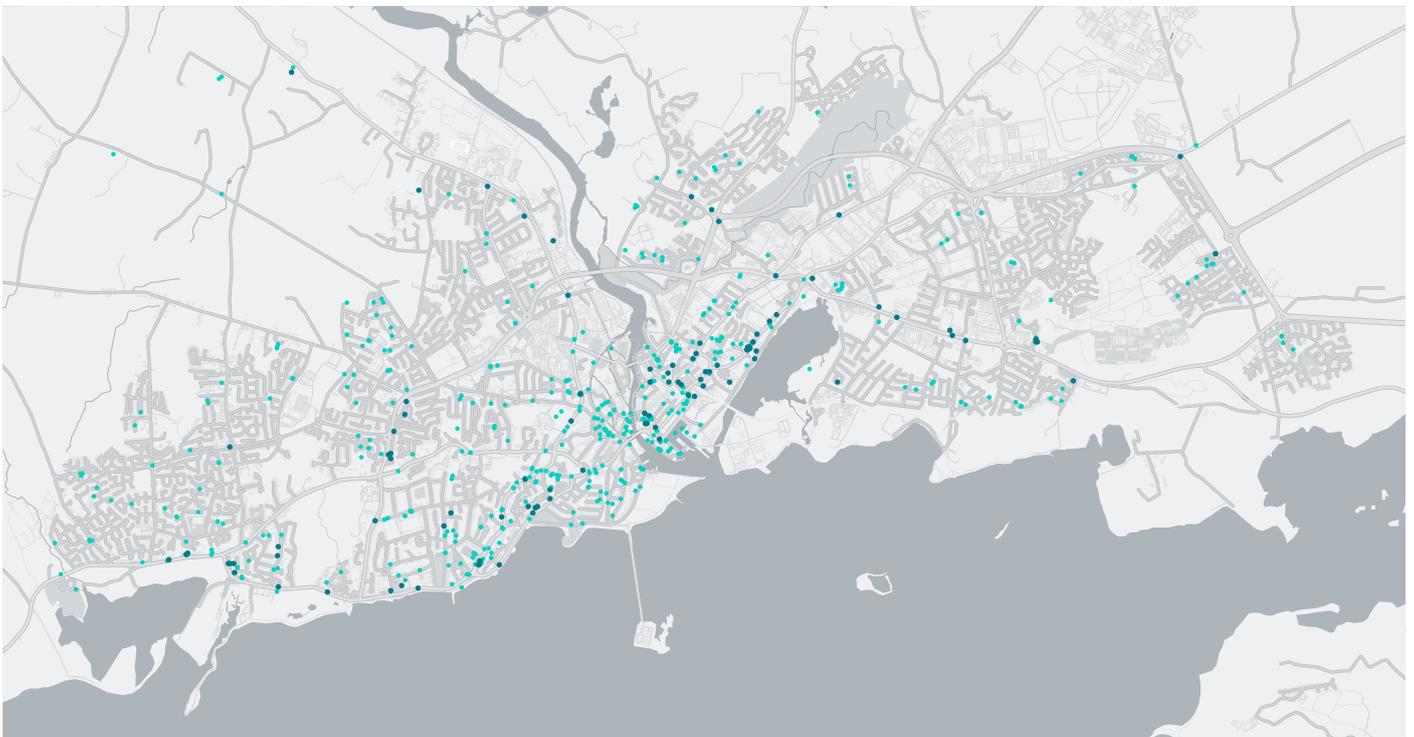
€ 382

Total spending per visitor per trip

€ 129	+	€ 35	=	€ 164	
Daily average daytime spending per visitor		Daily accommodation spending per visitor		Total spending per visitor per day	
				×	2.3
					Average nights per stay in single Airbnb

Airbnb visitors contribute significantly to Galway's tourism industry.

AIRBNB VISITATION BY NEIGHBOURHOOD VS. HOTELS



■ Airbnb Properties ■ Hotels

Source: Airbnb host and guest surveys; Airbnb bookings data; Hotel location data from by Hotelsbase.org API.

City Case Study: Cork

COMMUNITY OVERVIEW (OCTOBER 2014 - SEPTEMBER 2015)

260 Hosts

12,300 Inbound guests

€ 849,000 Hosting income earned by Cork hosts

€ 3.5 M Direct guest spending in Cork

€ 393

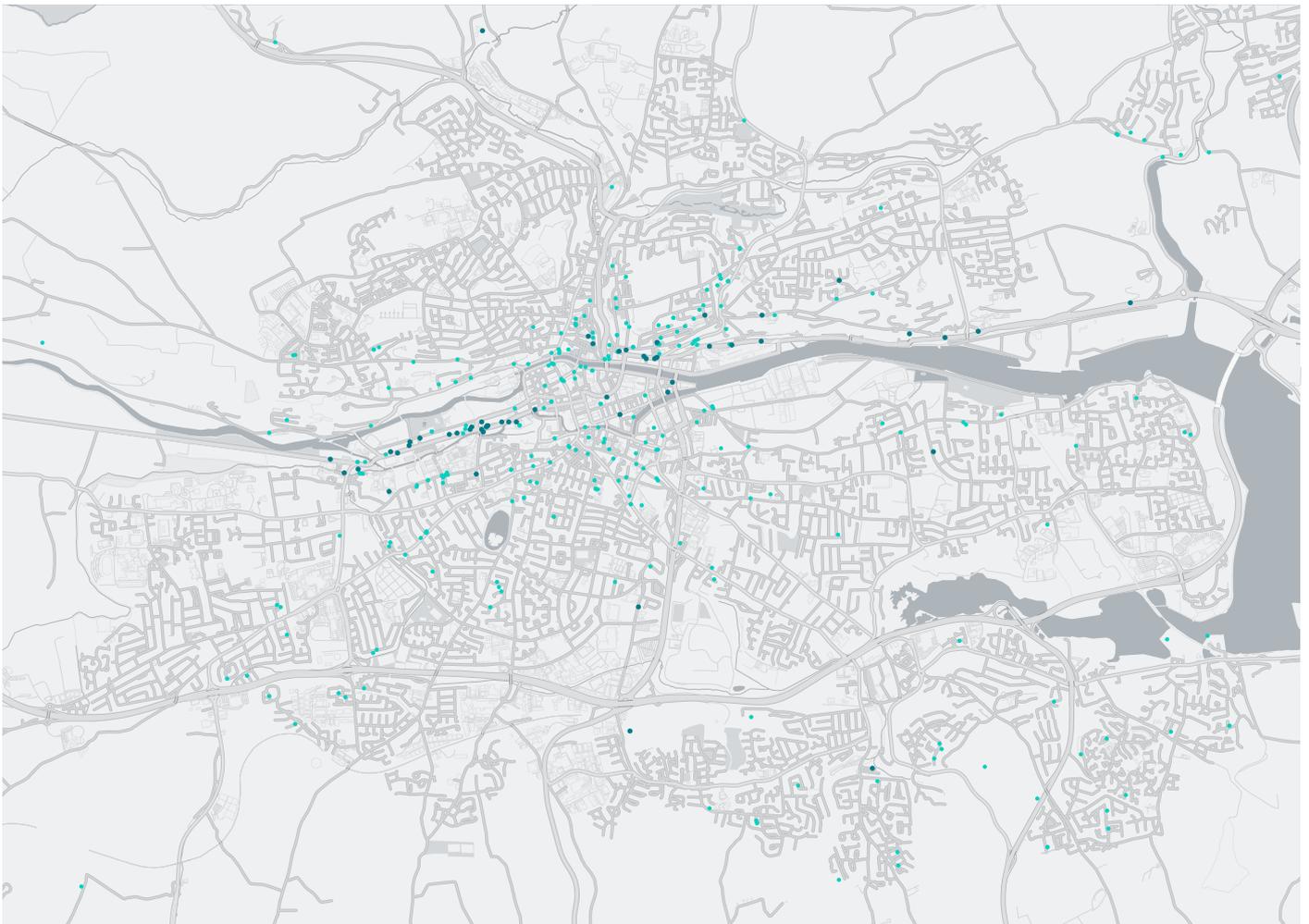
Total spending per visitor per trip

€ 110	+	€ 29	=	€ 139	
Daily average daytime spending per visitor		Daily accommodation spending per visitor		Total spending per visitor per day	
				×	2.8
					Average nights per stay in single Airbnb

Airbnb visitors contribute significantly to Cork's tourism industry.

Note: Spending is per guest per trip. Daytime spending includes all expenses incurred during the trip excluding accommodation, including food, shopping, entertainment, transit and other expenses. Source: Airbnb host and guest surveys; Airbnb bookings data

AIRBNB VISITATION BY NEIGHBOURHOOD VS. HOTELS



■ Airbnb Properties ■ Hotels

Source: Airbnb host and guest surveys; Airbnb bookings data; Hotel location data from by Hotelsbase.org API.

City Case Study: Kilkenny

COMMUNITY OVERVIEW (OCTOBER 2014 - SEPTEMBER 2015)

70 Hosts

4,800 Inbound guests

€ 200,000 Hosting income earned by Kilkenny hosts

€ 835,000 Direct guest spending in Kilkenny

€ 228

Total spending per visitor per trip

€ 110	+	€ 31	=	€ 141	
Daily average daytime spending per visitor (see note)		Daily accommodation spending per visitor		Total spending per visitor per day	
				×	1.6
					Average nights per stay in single Airbnb

Airbnb visitors contribute significantly to Kilkenny's tourism industry.

Note: Spending is per guest per trip. Daytime spending includes all expenses incurred during the trip excluding accommodation, including food, shopping, entertainment, transit and other expenses. Source: Airbnb host and guest surveys; Airbnb bookings data

AIRBNB VISITATION BY NEIGHBOURHOOD VS. HOTELS



■ Airbnb Properties ■ Hotels

Source: Airbnb host and guest surveys; Airbnb bookings data; Hotel location data from by Hotelsbase.org API.



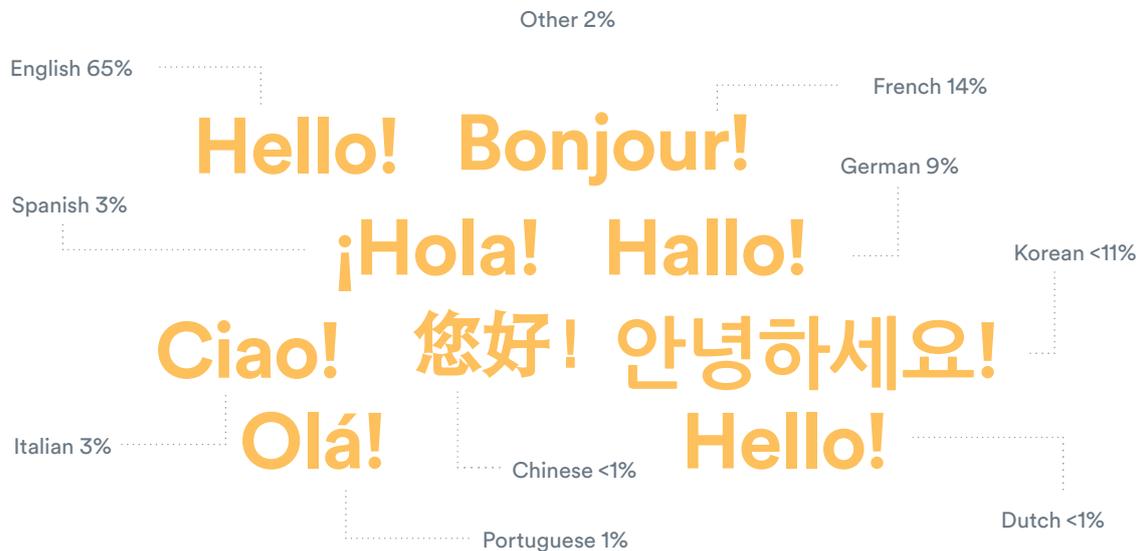
Cultural Exchange

Eighty-eight percent of Airbnb guests in Ireland are international, with 36 percent coming from outside of Europe. In the past year, this resulted in **hosts engaging with guests from more than 140 countries.**

“ Not only does Airbnb provide an alternative income for many people who need it to meet their most basic lifestyle needs, but the cultural exchange, the connectivity and the sense of community and trust that Airbnb builds for both residents and visitors is also invaluable.

Claire Byrne, Green Party Councillor for Dublin City / Pembroke South - Dock.

LANGUAGE DISTRIBUTION OF IRELAND GUESTS



“ I absolutely love meeting people from all over the world and since I have started to host it has motivated me to travel again. Airbnb brings people to our village who otherwise would not come so it enhances life for everyone in rural towns and villages.

Susan R., Cork Airbnb Host

“ Being a host has allowed me to interact with people that I otherwise would not be in a position to meet. Being a host has provided company for me whilst also providing some form of income. I now can socialise at home with my guests.

Caroline O., Kilkenny Airbnb Host

Airbnb and its Community

In addition to helping Ireland hosts connect with people from all walks of life, **Airbnb also helps create stronger local community connections**, as hosts build relationships with one another, with local businesses and with local community organisations, and find ways to support each other as hosts and as members of the same community.

54%

of hosts in Ireland said that hosting has positively affected the way they interact with their community

73%

of hosts say that hosting has positively changed the way they look at life

“ Because of hosting, I have a reason to take pride in my house and community.

Caroline O., Kilkenny Airbnb Host

“ Airbnb has pulled me out of a hole : financially it has helped me keep my home, personally it has provided much missed human interaction, and socially I am more aware and appreciative of my city and all it offers.

Barry O., Dublin Airbnb Host

Women and Airbnb

Women are central to Airbnb's vision of creating a world where anyone can belong anywhere. Well over half of Airbnb hosts, 61 percent, in Ireland are women. For many, hosting allows them to stay in their homes.

9%

of female hosts live in single-parent households

49%

of women hosts live in households earning below median income - compared to 30% for men

61%

of women hosts say hosting has helped them stay in their homes - compared to 52% for men



Environmental Impacts

By helping residents share their homes, Airbnb promotes the efficient use of existing resources as well as a more environmentally sustainable way of travelling. This type of travel results in significant reduction in energy and water use, greenhouse gas emissions, waste generation, and also encourages sustainability awareness among both residents and visitors.



Sustainability Awareness

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

In addition to more sustainable accommodation, Airbnb hosts surveyed around the world also tend to be more environmentally aware than typical residents, for example by having energy efficient appliances, and providing recycling for guests.

Less than half of Airbnb hosts around the world provide single-use toiletry products for their guests, also reducing waste per stay.

Because Airbnb guests stay in more residential neighbourhoods, they tend to be **more likely to use public transportation, walk or bicycle** as their primary mode of transportation than if they had stayed at a hotel.

“ If we are serious about sustainability, we need to be looking at new ways of doing things: how we live, move, travel, consume. Resource-efficient travel will have to play a central role in the Irish tourist industry as we move towards more environmentally focused tourism. Airbnb in Ireland means we are offering something [...] more sustainable as it [...] leverages an untapped resource that has real added value socially, economically and environmentally.

Claire Byrne, Green Party Councillor for Dublin City / Pembroke South - Dock

By staying in properties available on the Airbnb platform instead of traditional accommodation options, Airbnb guests in Ireland between October 2014 and September 2015 resulted in an estimated:

Energy savings equivalent of 3,700 typical homes in Europe
(144,000 MMBtus)

Greenhouse gas emissions reduction equivalent of 10,800 cars
(19,000 metric tons of CO₂)

Water reduction equivalent of 110 Olympic-sized pools
(149 M litres)

Waste reduction of Up to 540 metric tons



Airbnb host in Dublin

86% of Ireland hosts provide recycling for their guests.

28% of Ireland hosts use green cleaning products.

14% of Ireland hosts share their bicycles with their guests.

7% of Ireland hosts have solar panels on their homes.

While Ireland's economy, environment and community have already started to enjoy the benefits of home sharing, the practice is still just getting started. **There is exciting potential to harness the sharing economy's momentum and growth for even greater good.**



Airbnb host in Gorey



Data Sources and Methodology

Geography

With the exception of the case studies, this report focuses on the country of Ireland. Surveys were sent to hosts and guests within the country. Impacts of Airbnb activity in Ireland are also reviewed at the national level.

Economic Impact Methodology

The economic impacts presented in this report were calculated using the Supply and Use and Input-Output Tables for Ireland (CSO 2015). The number of jobs supported was calculated using a multiplier derived by the Irish Department of Finance in their Irish economic impact analysis.

The economic impact includes direct and indirect spending, but excludes induced spending impacts and is calculated at the national level.

The analysis relies on host earning and guest spending data collected from Airbnb and through host and guest surveys.

Hosts' Airbnb income spending is distributed across six household spending categories: Rent or Mortgage, Other Regular Household Expenses, Long-term Savings, Vacation, Extra Spending Money, Cleaners, Emergency Funds, and Other. Guests' daytime spending is distributed across six industries: Gastronomy, Groceries, Shopping, Other Leisure Activities, Transportation, and Other Services.

"The economic impacts presented in this report were calculated by Irish economists David McWilliams and Aoife O'Brien

Photography and Illustrations

All of the photography in this report is by Shane Lynam, a Dublin-based photographer. The illustrations are drawn by Dublin-based artist, Peter Donnelly. Airbnb is excited to share Boston's talented artists with our larger community, all of whom help make the city a beautiful place for visiting Airbnb guests.

Acknowledgments

Many thanks to the local hosts and businesses which were photographed for this study.

Data Sources

The findings in this report are based on extensive data about Airbnb hosts and visitors to and within Ireland from October 2014 through September 2015.

Key data sources include:

Host Survey

Email surveys were sent to all eligible Ireland hosts, who hosted guests from October 2014 through September 2015. 438 Ireland hosts responded to the survey. These results generated a 95 percent confidence level and a confidence interval of +/-5 percent.

Guest Survey

Email surveys were sent to guests who travelled to and within Ireland from October 2014 through September 2015. 1,689 guests responded to the survey. These results generated a 99 percent confidence level and a confidence interval of +/- 4 percent.

Bookings Data

Proprietary Airbnb bookings data from October 2014 through September 2015 for Ireland.

Economic Impact Analysis

Economist David McWilliams and Aoife O'Brien reviewed all data and calculations used in the economic impact analysis and conducted the economic impact analysis.

Environmental Impact Inputs

Environmental Impacts of Home-Sharing: Phase I Report, June 2014. Prepared by environmental consulting firm, Cleantech Group.



Airbnb host in Dublin

