

Short-stay accommodation offered via online collaborative economy platforms - impact of the Covid-19 pandemic

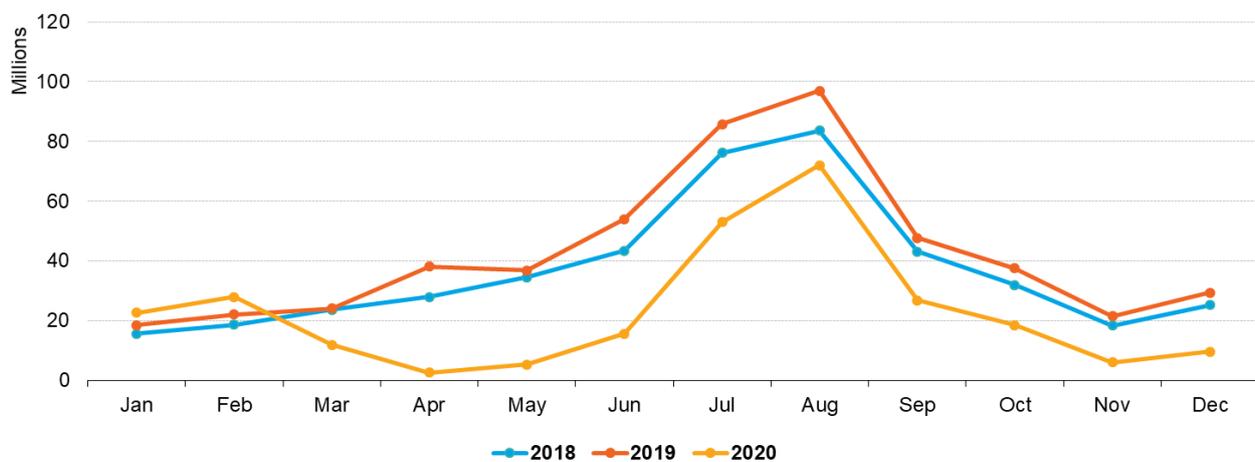
Statistics Explained

Data extracted in December 2021
Planned article update: February 2022



Monthly guest nights in the EU - 2018-2019 vs 2020

Nights spent in short-stay accommodation offered via online platforms



Source: Eurostat (Experimental statistics)

eurostat

Figure 1: Monthly guest nights in the EU, 2018-2020 Source: Eurostat (Experimental statistics)

The ongoing Covid-19 pandemic has profound impacts on tourism in the EU. Travel and lodging restrictions limit the possibilities of spending a vacation abroad, and potential tourists are reluctant in order to limit their exposure to health risks. An agreement between the European Commission and four large online collaborative economy platforms (Airbnb, Booking, Expedia Group and Tripadvisor), signed in March 2020, allows Eurostat to compare guest nights spent in short-stay accommodation offered in 2019 and 2020. The expression “platform tourism”, used throughout this article, refers to short term rentals booked through these four platforms. This article accompanies the [article on the pre-pandemic covering 2018 and 2019](#).

An important disclaimer for the reader is that both articles and the data only refer to the accommodation offered through these four platforms, and can – due to possible overlaps – not be added to other tourism statistics on holiday rentals or other types of accommodation such as hotels, available via [European statistics on tourist accommodation](#)

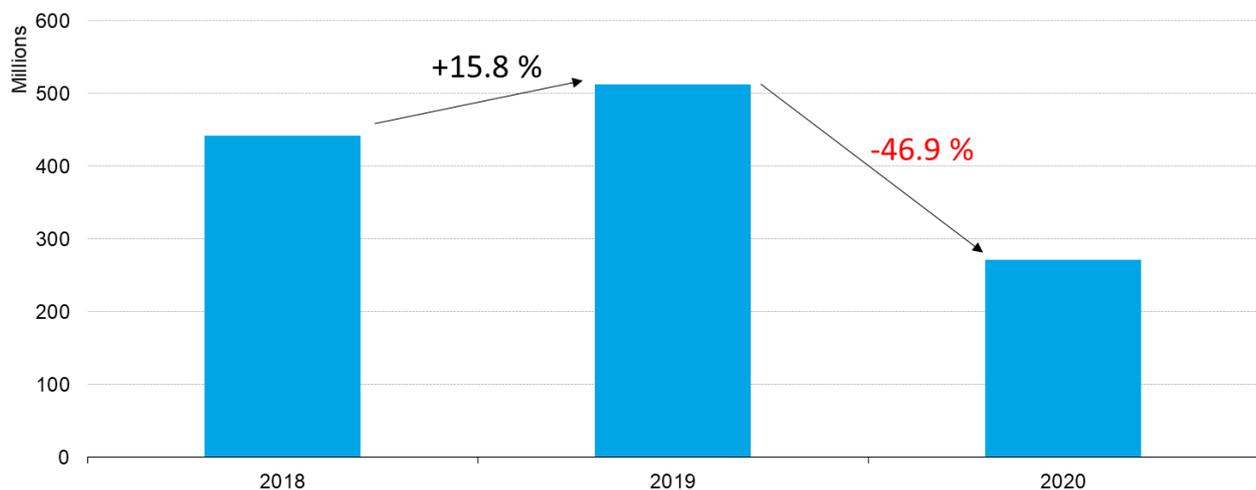
. Additionally, only merged data for the four platforms is released: no data on individual platforms is disclosed.

This article uses data that are published as [experimental statistics](#) . Such statistics use new data sources or methods to match user needs, but have not yet reached the maturity of fully-fledged official statistics. The project pioneers Eurostat's use of privately held data via a direct cooperation with the industry, to produce reliable data covering the entire EU in a coherent way.

In 2020, nights booked through the platforms decreased by almost half

Annual guest nights in the EU

Nights spent in short-stay accommodation offered via online platforms



Source: Eurostat (Experimental statistics)

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Figure 2: Annual guest nights in the EU, 2018-2020 Source: Eurostat (Experimental statistics)

In 2020, 272 million guest nights were spent in accommodation booked via one of the four platforms. This is a drastic decrease of 46.9 % compared with 2019 (see Figure 2), when almost 512 million guest nights were booked. The decrease coincides with the outbreak of the Covid-19 pandemic in March 2020, which led to strict travel and lodging restrictions in most countries of the world and to a general reluctance to travel to limit exposure to health risks. The number of guest nights takes into account the number of nights spent during a stay and the number of tourists in the travel party. The concept is similar to the "nights spent at tourist accommodation establishments" generally used in official tourism statistics, and will be the focal volume indicator in this article.

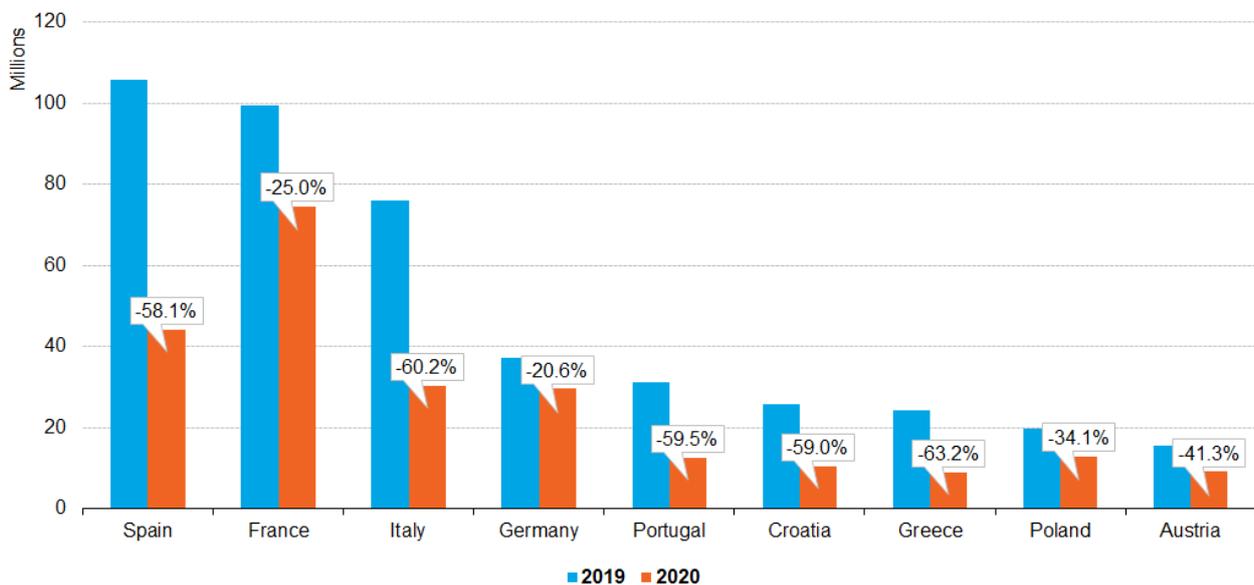
While guest numbers slightly increased in January and February 2020 compared with 2019, the arrival of the Covid-19 pandemic in Europe during March 2020 brought bookings close to zero in April and May (-93.2 % in April and -85.6 % in May, compared with April and May 2019; see Figure 1). After many countries eased travel restrictions in the summer, the number of nights spent recovered and followed the trajectory recorded in previous years, whilst still being much lower (-38.3 % in July and -25.8 % in August). However, the arrival of the second wave of the pandemic in autumn/winter 2020 led to another severe impact on booking numbers towards the end of the year (-71.8 % in November).

The decrease was most pronounced in southern Europe

Figure 3 and Table 1 show that platform tourism was hit unevenly across Europe. When looking at the nine countries with more than 10 million guest nights in 2019 (Figure 3), it becomes clear that traditional summer destinations around the Mediterranean Sea were hit much harder than the European average, with countries such as Spain (-58.1 %) and Italy (-60.2 %) affected more severely than France (-25.0 %) or Germany (-20.6 %). Overall, Table 1 and Figure 4 show that eight countries (Czechia, Greece, Italy, Cyprus, Hungary, Malta, Slovenia and Iceland) registered falls of more than 60 %, with Iceland exhibiting the largest relative decrease (-74.9 % from 2.2 million nights in 2019 to 549.000 in 2020; Figure 4). While the number of guest nights decreased in all 31 countries observed, Switzerland, Germany, France and Sweden were least affected, with relative decreases below 30 %.

Guest nights by country - 2019 vs 2020

Nights spent in short-stay accommodation offered via online platforms
(Countries with ≥ 10 million guest nights in 2019)



Source: Eurostat (Experimental statistics)

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Figure 3: Guest nights by country, 2019 vs 2020 Source: Eurostat (Experimental statistics)

Guest nights spent in short-stay accommodation offered via online platforms, by country - 2019 vs 2020

Country	2019			2020			Change (%)		
	Total	Domestic	International	Total	Domestic	International	Total	Domestic	International
EU	511 939 000	169 736 000	342 202 000	271 698 000	158 348 000	113 350 000	-46.9%	-6.7%	-66.9%
Belgium	6 987 000	1 624 000	5 363 000	4 467 000	2 166 000	2 301 000	-36.1%	33.4%	-57.1%
Bulgaria	3 047 000	830 000	2 217 000	1 629 000	814 000	815 000	-46.5%	-1.9%	-63.2%
Czechia	9 401 000	1 607 000	7 794 000	3 639 000	1 576 000	2 063 000	-61.3%	-1.9%	-73.5%
Denmark	4 681 000	1 004 000	3 677 000	2 954 000	1 385 000	1 569 000	-36.9%	37.9%	-57.3%
Germany	37 236 000	23 513 000	13 723 000	29 583 000	23 830 000	5 753 000	-20.6%	1.3%	-58.1%
Estonia	1 523 000	311 000	1 212 000	806 000	372 000	435 000	-47.1%	19.6%	-64.1%
Ireland	6 912 000	1 498 000	5 414 000	2 920 000	1 777 000	1 143 000	-57.8%	18.6%	-78.9%
Greece	24 302 000	3 394 000	20 908 000	8 936 000	2 293 000	6 643 000	-63.2%	-32.4%	-68.2%
Spain	105 602 000	34 349 000	71 253 000	44 207 000	24 493 000	19 714 000	-58.1%	-28.7%	-72.3%
France	99 453 000	57 033 000	42 421 000	74 606 000	58 233 000	16 372 000	-25.0%	2.1%	-61.4%
Croatia	25 630 000	1 180 000	24 450 000	10 500 000	900 000	9 600 000	-59.0%	-23.7%	-60.7%
Italy	76 044 000	19 696 000	56 348 000	30 284 000	15 160 000	15 124 000	-60.2%	-23.0%	-73.2%
Cyprus	4 241 000	317 000	3 924 000	1 352 000	370 000	982 000	-68.1%	16.7%	-75.0%
Latvia	1 338 000	168 000	1 170 000	748 000	240 000	507 000	-44.1%	42.9%	-56.7%
Lithuania	1 578 000	460 000	1 118 000	992 000	586 000	405 000	-37.1%	27.4%	-63.8%
Luxembourg	281 000	19 000	262 000	187 000	28 000	159 000	-33.5%	47.4%	-39.3%
Hungary	9 173 000	1 140 000	8 033 000	3 186 000	1 126 000	2 059 000	-65.3%	-1.2%	-74.4%
Malta	3 212 000	122 000	3 090 000	897 000	146 000	752 000	-72.1%	19.7%	-75.7%
Netherlands	9 396 000	1 705 000	7 691 000	5 901 000	2 553 000	3 347 000	-37.2%	49.7%	-56.5%
Austria	15 572 000	1 242 000	14 330 000	9 143 000	1 491 000	7 652 000	-41.3%	20.0%	-46.6%
Poland	19 685 000	10 208 000	9 478 000	12 969 000	9 259 000	3 710 000	-34.1%	-9.3%	-60.9%
Portugal	31 064 000	3 500 000	27 564 000	12 577 000	4 159 000	8 418 000	-59.5%	18.8%	-69.5%
Romania	4 192 000	2 019 000	2 173 000	2 312 000	1 750 000	562 000	-44.8%	-13.3%	-74.1%
Slovenia	2 584 000	187 000	2 396 000	877 000	177 000	701 000	-66.1%	-5.3%	-70.7%
Slovakia	2 238 000	567 000	1 672 000	1 435 000	671 000	764 000	-35.9%	18.3%	-54.3%
Finland	2 916 000	1 071 000	1 845 000	1 999 000	1 289 000	709 000	-31.4%	20.4%	-61.6%
Sweden	3 650 000	972 000	2 678 000	2 594 000	1 503 000	1 091 000	-28.9%	54.6%	-59.3%
Iceland	2 186 000	58 000	2 128 000	549 000	64 000	485 000	-74.9%	10.3%	-77.2%
Liechtenstein	17 000	0	17 000	12 000	0	12 000	-29.4%	:	-29.4%
Norway	3 970 000	1 136 000	2 834 000	2 465 000	1 467 000	998 000	-37.9%	29.1%	-64.8%
Switzerland	6 383 000	1 596 000	4 787 000	5 240 000	2 910 000	2 331 000	-17.9%	82.3%	-51.3%

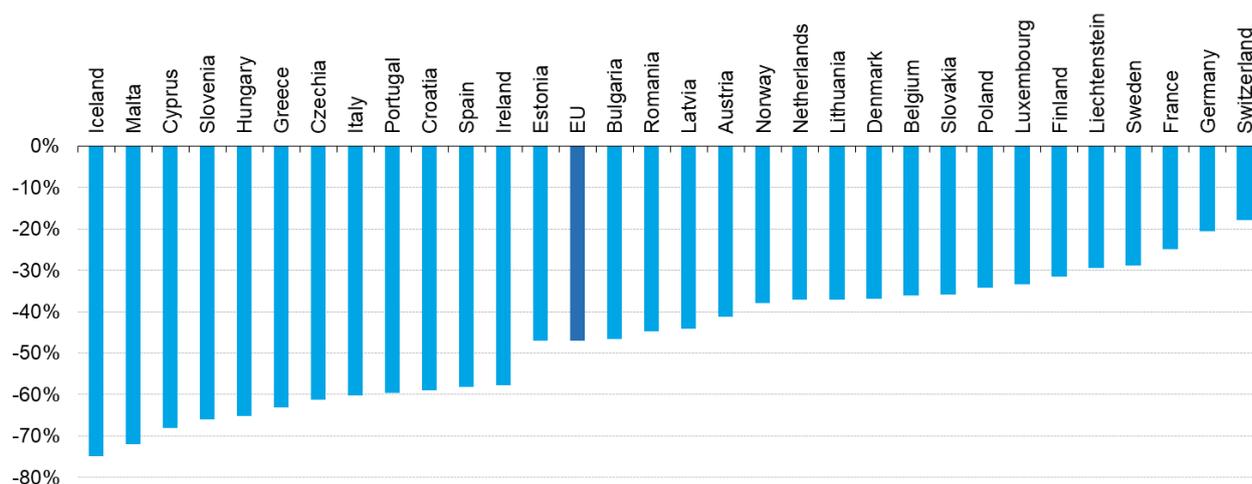
Source: Eurostat (experimental statistics)



Table 1: Guest nights spent in short-stay accommodation offered via online platforms, by country - 2019 vs 2020 Source: Eurostat (Experimental statistics)

Decrease in guest nights in 2020 compared with 2019

Nights spent in short-stay accommodation offered via online platforms



Source: Eurostat (Experimental statistics)

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Figure 4: Decrease in guest nights by country, 2020 compared with 2019 Source: Eurostat (Experimental statistics)

Huge discrepancies at regional level as tourism shifts to domestic destinations

The 27 Member States of the EU are divided into 334 statistical regions (NUTS 2 level). When analysing the decrease of platform tourism at regional level, it becomes clear that not all regions were affected equally, see Figure 5. Coastal regions along the Mediterranean Sea, as well as capital city regions, reported the highest decreases in 2020. The regions with the highest decreases were Eastern Macedonia and Thrace in Greece (-78.8 %), Prague in Czechia (-75.5 %), Iceland (-74.9 %), Eastern and Midland in Ireland (-74.9 %; includes Dublin) and Lazio in Italy (-74.7 %; includes Rome). On the other hand, there were even a handful of regions in Europe where an increase in platform tourism occurred against the prevalent trend, such as coastal regions in Germany (Mecklenburg-Vorpommern + 7.6 %) and the Netherlands (Drenthe +17.1 %), as well as several regions in France, Poland and Sweden, among others. These developments indicate that travellers were shifting from traditional summer destinations along the Mediterranean Sea to domestic resorts on the North and Baltic Seas, as well as avoiding large cities.

Guest nights spent at short-stay accommodation

Booked via online platforms, NUTS2, decrease between 2019 and 2020

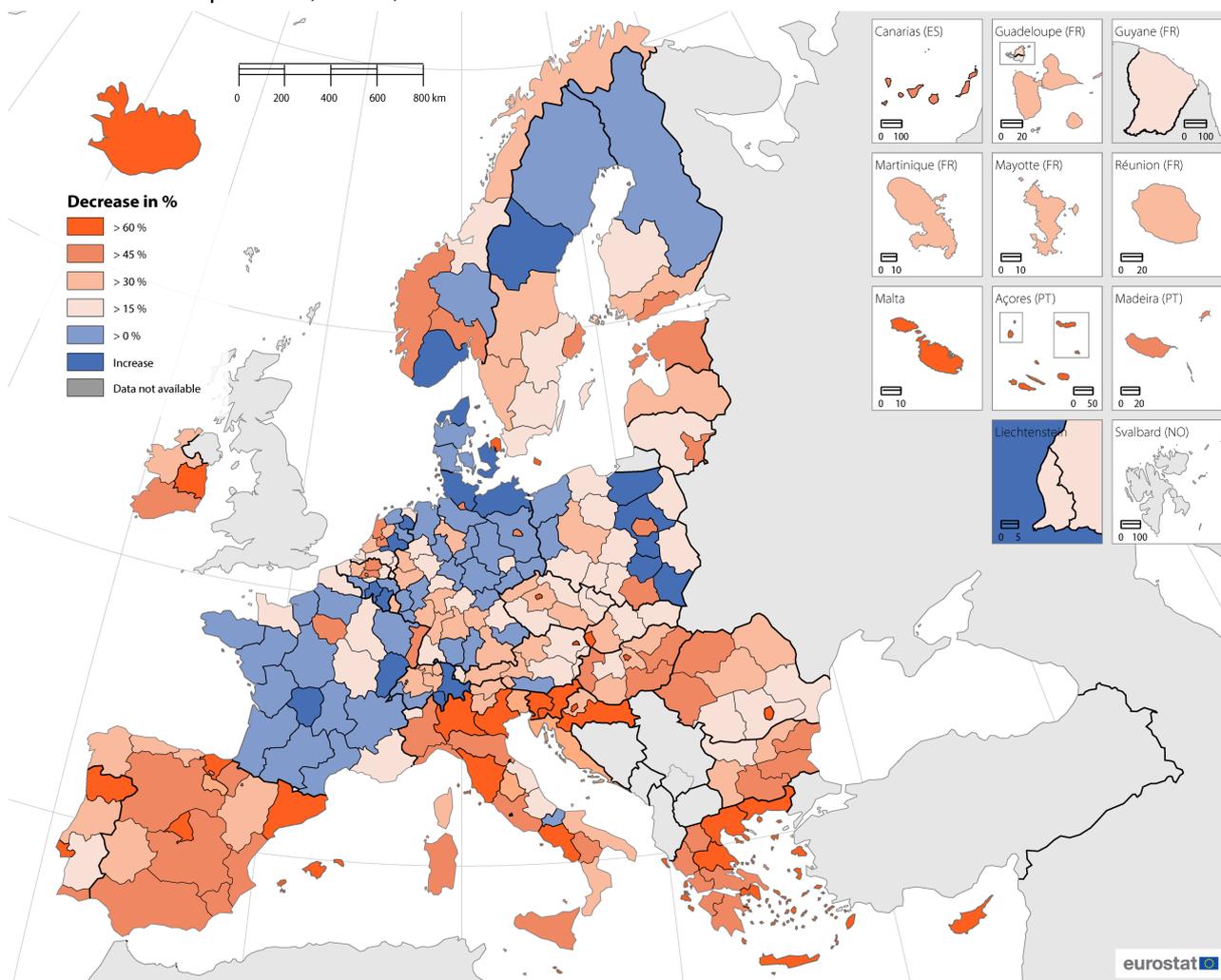
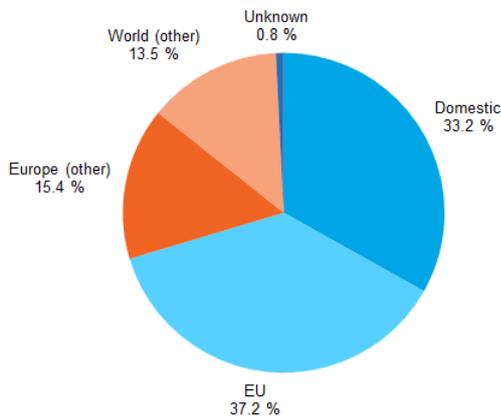


Figure 5: Map of the decrease in guest nights by NUTS2, 2020 compared with 2019 Source: Eurostat (Experimental statistics)

Share of domestic tourists increased from 33.2 % in 2019 to 58.3 % in 2020

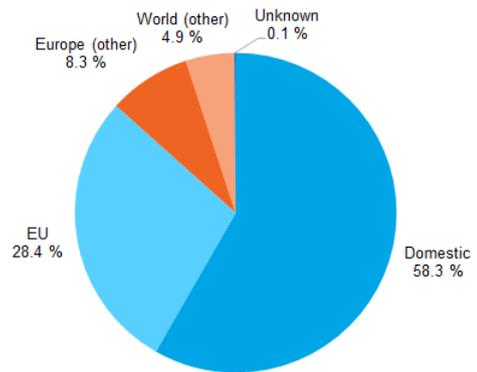
In 2019, domestic tourism (referring to nights spent by tourists within their country of residence) was responsible for around one third of the total nights spent. Tourists from EU countries other than the host country accounted for around 37 % of guest nights, those from other European countries for around 15 %, while 14 % of travellers came from outside Europe. In 2020, as international travel became subject to increasingly severe restrictions, the share of domestic tourists increased to almost 60 %. Travel within the EU still had a significant share (around 28 %), while travel from outside the EU decreased drastically (8 % other Europe; 5 % for the rest of the world).

Guest nights by origin of guest, EU, 2019
Nights spent in short-stay accommodation offered via online platforms



Source: Eurostat (Experimental statistics)

Guest nights by origin of guest, EU, 2020
Nights spent in short-stay accommodation offered via online platforms

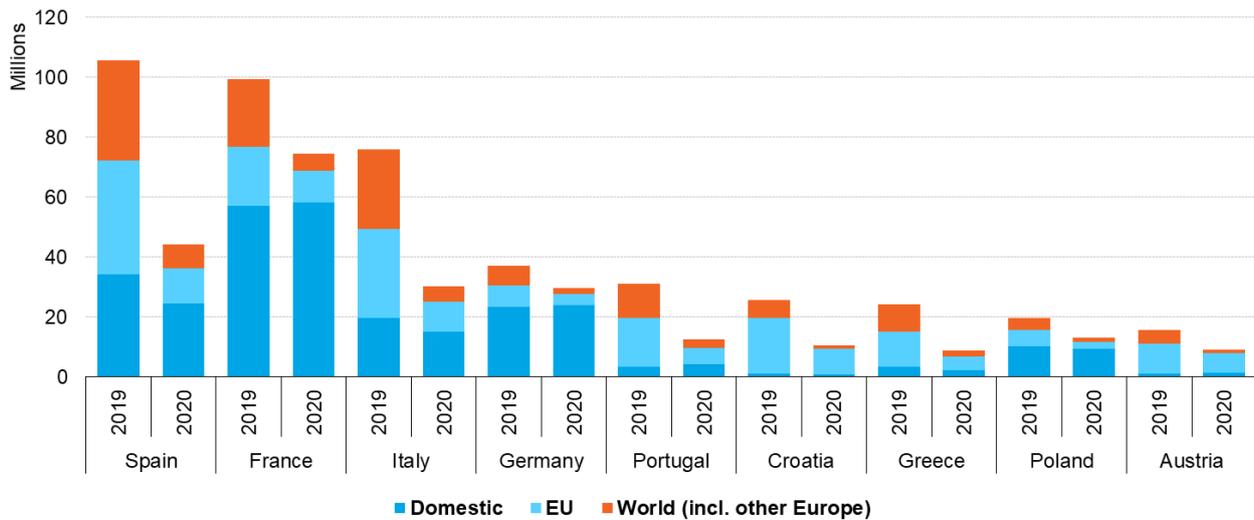


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Figure 6: Guest nights by origin of the guest, EU-27, 2019 and 2020 Source: Eurostat (Experimental statistics)

Guest nights by origin of the guest, 2019 vs 2020

Nights spent in short-stay accommodation offered via online platforms



Source: Eurostat (Experimental statistics)

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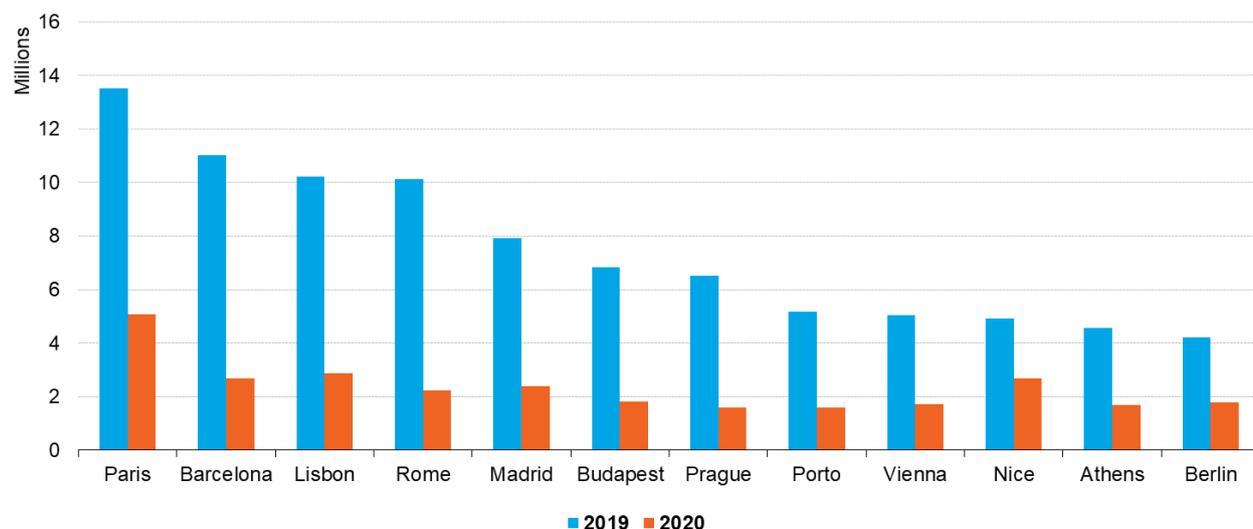
Figure 7: Guest nights by origin of the guest, top countries, 2019 and 2020 Source: Eurostat (Experimental statistics)

Top city destinations losing around three quarters of guest nights in 2020

City destinations were hit particularly hard by the pandemic. Figure 8 shows the number of guest nights for the ten most popular cities in 2019 and 2020. All of them, except Berlin (-57.9 %) and Nice (-45.7 %), reported a decrease of more than 60 % of guest nights in 2020, with Rome losing 78.0 %, Barcelona 75.6 % and Prague and Budapest 73.5 % of guest nights.

Guest nights by city - 2019 vs 2020

Nights spent in short-stay accommodation offered via online platforms



Source: Eurostat (Experimental statistics)

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Figure 8: Guest nights by city, 2019 vs 2020 Source: Eurostat (Experimental statistics)

Data sources

The article is based on data provided to Eurostat by four international platforms (Airbnb, Booking, Expedia Group, Tripadvisor), following agreements on data exchange concluded early 2020. The data covers short-stay accommodation in the EU and EFTA countries, offered by service providers via one of these four online collaborative economy platforms.

Scope and key concepts

- **Scope:** the data covers holiday rentals (excluding hotels and campsites) offered via four online collaborative economy platforms.
- **Number of stays:** number of times a facility offered via the platforms was occupied.
- **Number of nights:** number of nights a facility offered via the platforms was occupied
- **Number of guest nights:** number of nights spent during a stay, taking into account the size of the travel party; this article mainly focuses on this concept (e.g.: a family of four staying 3 nights in an apartment represents 1 stay, 3 nights and 12 guest nights).
- **Domestic guest nights:** guest nights spent by tourists who are residents of the country visited.
- **International guest nights:** guest nights spent by tourists who are non-residents to the country visited.
- **Cities** are those local administrative units (LAU) where at least 50 % of the population lives in an urban centres; an urban centre is a cluster of contiguous grid cells of 1 km² with a density of at least 1 500 inhabitants per km² and collectively a population of at least 50 000 inhabitants. A city can be composed of several local administrative units. For the purpose of these statistics, only 'selected cities' are considered, namely those cities that fulfil at least one of the following criteria: i. capital cities ; ii. cities having at least 200 000 inhabitants ; iii. other cities in a country that, jointly, account for 90 % of annual guest nights spent in cities of that country. Further information on the delineation of the 'selected cities', namely which local administrative units they comprise, can be found [here](#) .

Context

The collaborative economy, also called the sharing economy, covers a great variety of sectors and is rapidly growing across Europe. In the tourism sector, the collaborative economy provides many exciting opportunities for citizens as consumers as well as for micro-entrepreneurs and SMEs. At the same time, its rapid development has led to challenges, particularly in popular tourist destinations. As a result, cities and other communities are seeking to strike a balance between promoting tourism, with the economic benefits it brings, and maintaining the integrity of local communities. To promote a balanced development of the collaborative economy, the Commission issued guidelines to EU countries in 2016 on how existing EU rules apply to the collaborative economy. A series of workshops in 2017 and 2018 identified policy principles and good practices specifically on collaborative short-term accommodation services.

In March 2020, the Commission reached a landmark agreement with Airbnb, Booking, Expedia Group and Tripadvisor on data sharing. The agreement, signed between each platform and Eurostat on behalf of the European Commission, allows Eurostat to obtain key data from the four collaborative platforms and publish key statistics on short-term accommodation rentals concluded through these platforms on its website. In particular, platforms agreed to share, on a continuous basis, data on the number of nights booked and the number of guests. The privacy of citizens, including guests and hosts, is protected in line with applicable EU legislation and data will not allow individual citizens or property owners to be identified. The data provided by the platforms is then subject to statistical validation and aggregated and published by Eurostat.

The agreement has allowed, for the first time, access to reliable data about holiday and other short-stay accommodation offered via these collaborative economy platforms. It helps to close an information gap, since data on holiday homes, apartments and rooms in otherwise private buildings are often outside the scope of existing tourism registers.

See also

- [Short-stay accommodation offered via online collaborative economy platforms](#)

Main tables

- [2019 Output table](#)
- [2018 Output table](#)

Dedicated section

- [Collaborative economy platforms](#)

Methodology

- [Methodological note](#)

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