

Overview of the Airbnb Community in Africa

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Introduction

As travel and tourism continue to grow their economic contribution to the global economy, traveller arrivals in emerging destinations are expected to rise at twice the rate of arrivals in advanced economies through the end of the next decade.

Travel and tourism today account for 10 percent of global GDP and one in every 10 jobs, according to the World Travel & Tourism Council; travel to emerging destinations is projected to outpace travel to established ones by 4.4 percent per year to 2.2 percent from now until 2030, according to the UNWTO.

As tourism in emerging destinations increases, the Airbnb platform is helping to ensure this growth is healthy and inclusive by being available to communities and populations that traditionally have been unable to fully benefit from tourism. Airbnb helps open these communities to guests through authentic and affordable travel.

Nowhere in the world is this more true than in Africa. Today, the Airbnb platform in Africa is empowering a far more diverse range of places and people, well beyond typical hotel districts and the traditional hospitality industry, to welcome guests, create new opportunities, and establish pathways to economic stability for families.

The typical Africa host on Airbnb earns \$1,500 yearly and the typical listing on Airbnb is shared for 18 nights per year. The average age of hosts in Africa is 43 and the host community is evenly split at 51 percent women and 49 percent men.

In South Africa, the first African country to be represented on the Airbnb platform, the platform counts 43,400 active listings and the typical host earns \$1,900 yearly, with the typical listing on Airbnb being

shared for 19 nights per year. In Nigeria, one of the newest Airbnb communities in Africa with 730 active listings, the typical host earns \$1,000 and the typical listing on Airbnb is shared for 13 nights per year.

Home sharing is healthy tourism by virtue of being not only inclusive but also sustainable, helping people create new economic opportunities for themselves in the homes and communities where they live, and helping emerging destinations welcome more visitors in a scalable, sustainable way. With up to 97 percent of the accommodation charge remaining in the hands of hosts, and 42 percent of guests' spending occurring within the neighbourhoods where they stay, the financial impact of home sharing can be significant for emerging travel destinations.

Intracontinental travel accounts for the greatest share of Airbnb Africa guests: 29 percent of guests arriving in Africa come from somewhere else on the continent. France is the next greatest source of guests, accounting for 13 percent, followed by the US at 12 percent and the UK at 10 percent.

Of the 29 percent of guest arrivals from African nations, South Africa sources fully one-quarter of all intracontinental arrivals at 25 percent, with Kenya claiming 1 percent and other African nations, 3 percent.

2M+

Airbnb guest arrivals
in Africa within the
past five years

\$139M

Host income earned by
households in Africa
in the past year

\$247M

Estimated economic
activity generated by
hosts and guests on
Airbnb in South Africa



Experiences

To meet growing traveller demand for unique or different kinds of experiences, Airbnb earlier this year launched Experiences, an offer through which locals create unique activities, giving travellers unprecedented access and deep insights into communities and places they may not otherwise come across. We are particularly thrilled to have launched the Experiences product in South Africa, making the country one of the few emerging destinations in which hosts offer both homestays and Experiences on our platform.

Today, over 90 Experiences are available in South Africa, of which 15 percent are Social Impact Experiences, the proceeds of which go directly to a nonprofit, all helping to diversify the country's tourism offer and enable South Africans to turn their hobbies and passions into economic opportunities.



Empowering underserved communities

Our work now underway with local hosts in Cape Town's townships offers an especially compelling example of the economic and social empowerment home sharing can bring. Unlike other means of earning that involve technology, the barriers to entry for hosting on the Airbnb platform are low.

One pilot program involving 15 hosts in the Western Cape is focused on fostering entrepreneurship, technology and hospitality skills. Airbnb partnered with Open Africa, the South African College for Tourism, and the Cape Innovation and Technology Initiative to fund a pilot to support communities in Africa to better their future through tourism. The hosts have since formed their own vibrant community group to work together to build out home and experiences offers in their destinations and to raise awareness with local policymakers about the benefits of home sharing.

In Langa, one of South Africa's oldest townships, Airbnb supports iKhaya le Langa, a nonprofit dedicated to revitalising the area through social enterprise and tourism. iKhaya le Langa has been empowering local residents to use the Airbnb platform as hosts, and our CEO and Head of Community, Brian Chesky, has personally affirmed our goal of empowering Langa women to become hosts on Airbnb by the end of 2017.

On a recent weekend of action in Langa, we invited hosts from Cape Town to spend the weekend in the township, where they stayed in listings on Airbnb and took part in activities from sharing meals with each other to enjoying Experiences organised by local hosts. The weekend was a great opportunity for these communities of homestay hosts and Experience hosts on Airbnb to come together to learn from each other, celebrate their diversity and emphasise how all can feel as if they truly belong anywhere.

While Airbnb is not a panacea for the many obstacles to greater empowerment that locals from underserved communities face worldwide, our work in South Africa in particular demonstrates how Airbnb can help locals in emerging economies independently achieve greater financial, professional, and social empowerment.

Through case studies and the words of hosts on Airbnb, the following pages illustrate the impact of hosting and the healthy, inclusive tourism that Airbnb enables in Africa.



Overview of the Airbnb community in Africa

Founded in August 2008, Airbnb is a trusted community marketplace for people to list and book accommodation in more than 65,000 cities and 191 countries around the world.

Airbnb allows travellers to connect to unique local experiences at any price point. Africa now counts 100,000 listings, and hosts on Airbnb have welcomed 1.2 million guests in the past year.

Overview of the Airbnb host community in Africa

The host community

100,000

Active listings

\$1,500

Annual earnings
for a typical host

18

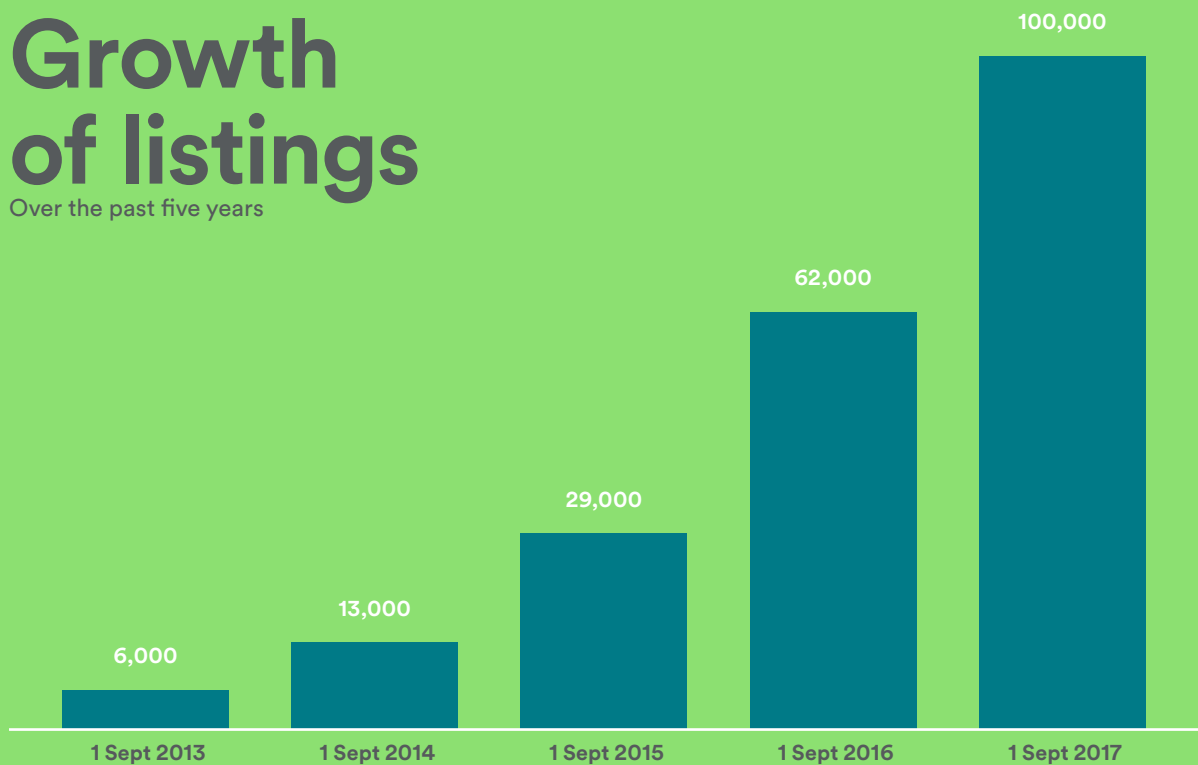
Nights hosted per year
for a typical listing

\$139M

Income earned by local
households in past year

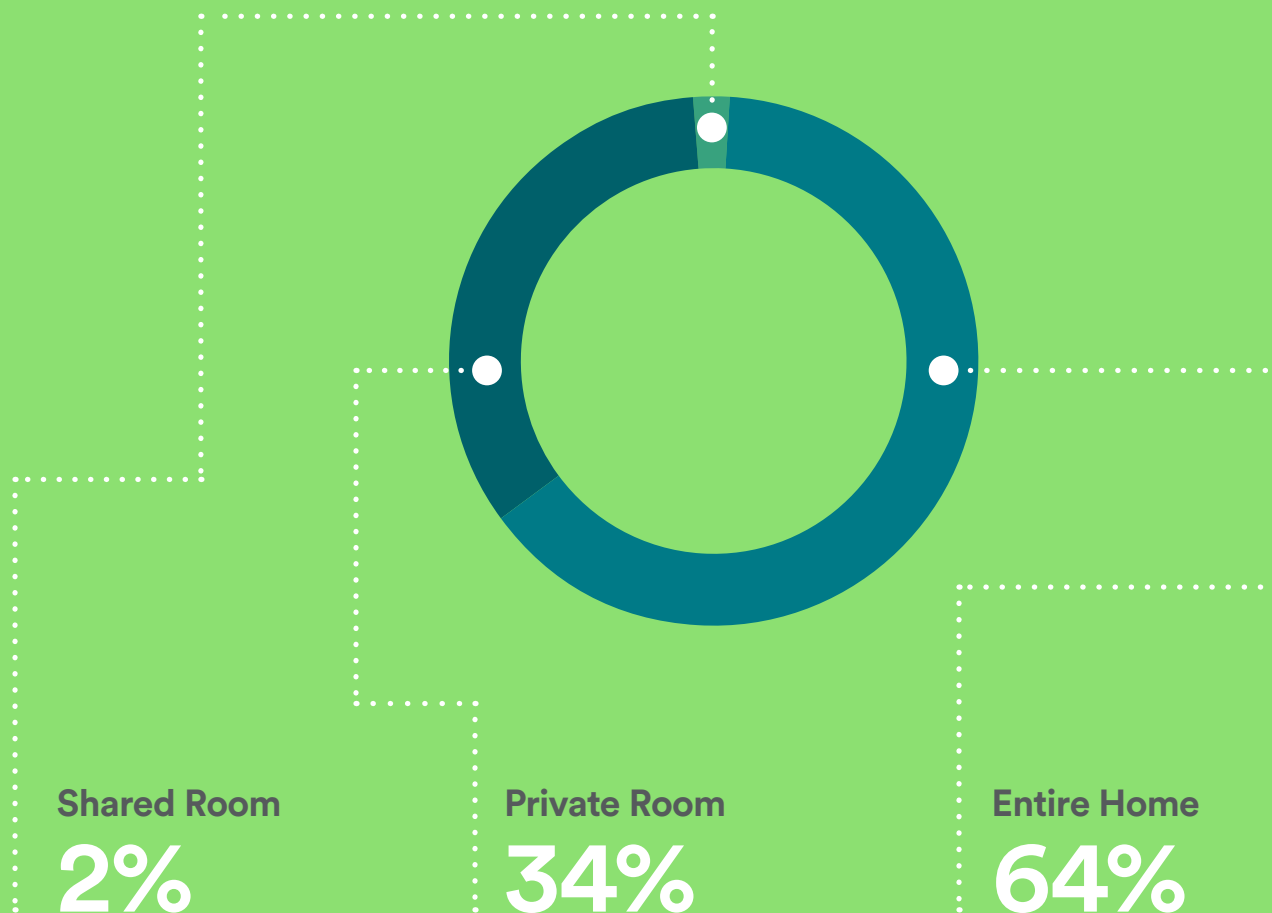
Growth of listings

Over the past five years



Overview of the Airbnb host community in Africa

Active listings on Airbnb in Africa by type



Host demographics



49%

Male

43

Average host age



51%

Female

Overview of the Airbnb host community in Africa

Host quotes

“For me personally, Airbnb embodies the spirit of ‘Ubuntu’, a community-driven foundation of South African culture: ‘I am what I am because of who we all are.’”

Belinda

Cape Town, South Africa

“Airbnb has given me the chance to earn an extra income, which is really valuable to me. Also, because of the good reviews I have gotten since beginning with Airbnb, I get more bookings. There is also a sense of ease when guests book through Airbnb, because you can also see who is coming to your home. It has definitely benefitted me.”

Christine

Nairobi, Kenya

“Airbnb is a great way to travel the world without leaving one's home. I get to meet people from so many different cultures and experience the world through their stories that for me, it's almost as good as being everywhere they've been.

I've made lasting friendships with some of my Airbnb guests, and that's something as well. A network of friends all over the world. Every new person has a different story; it would be difficult not to be impacted even in a small way by them.”

Sylvia

Kigali, Rwanda

Overview of the Airbnb guest community in Africa

Guests

1.2M

Total inbound guests
in the past year

4.2 nights

Average length of
stay per guest

592,000

Outbound guests
in the past year

37

Average age of the
booking guest

2.6

Number of people in
the average party size

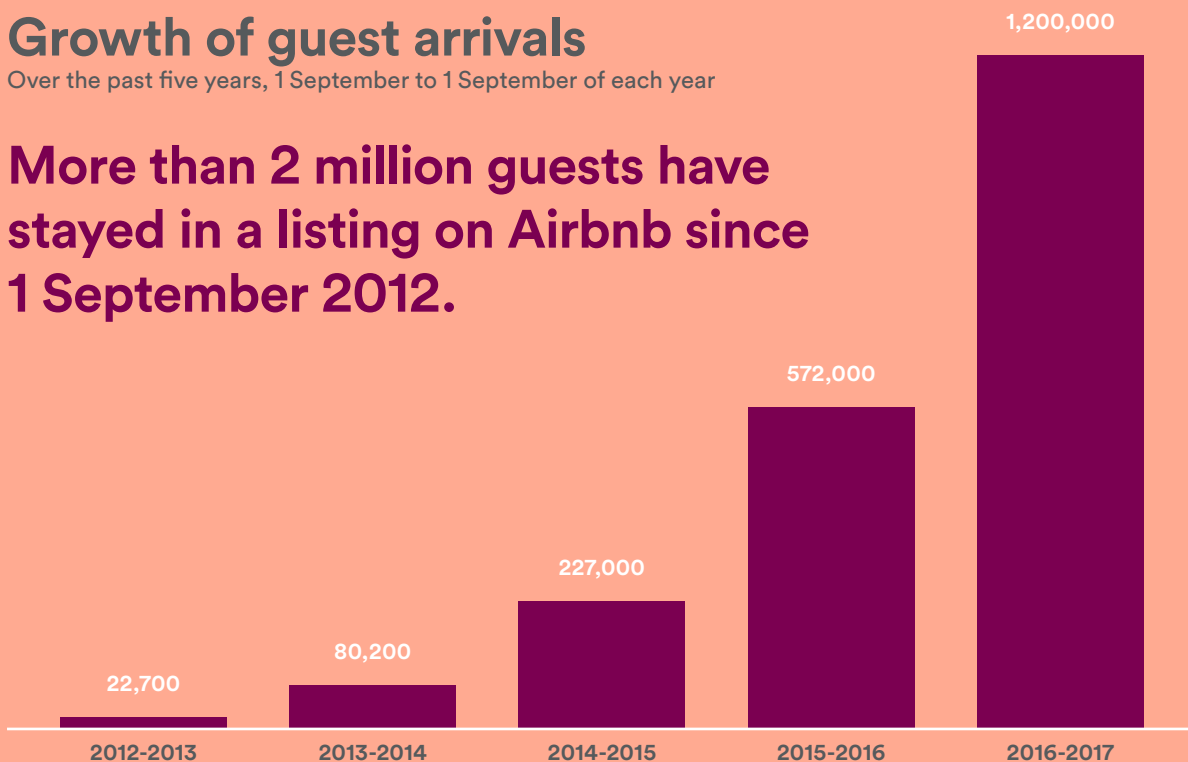
18%

Total guest arrivals travelling
as part of a family and booked
after 1 January 2017

Growth of guest arrivals

Over the past five years, 1 September to 1 September of each year

**More than 2 million guests have
stayed in a listing on Airbnb since
1 September 2012.**



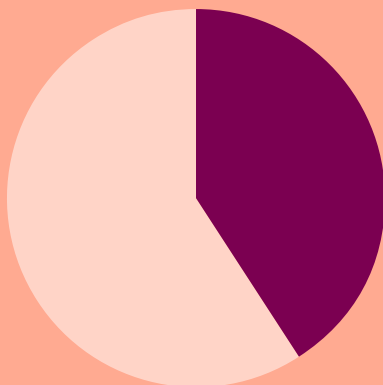
Overview of the Airbnb guest community in Africa

Millennial¹ travellers are increasing in Africa

Trips booked between 1 September and 1 September of each year

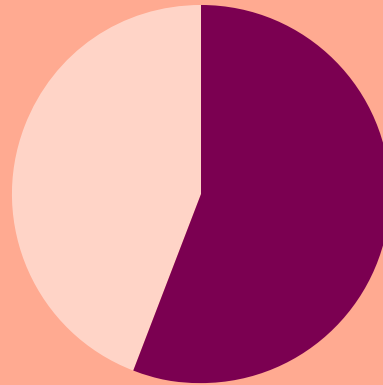
41%

2012-2013



56%

2016-2017

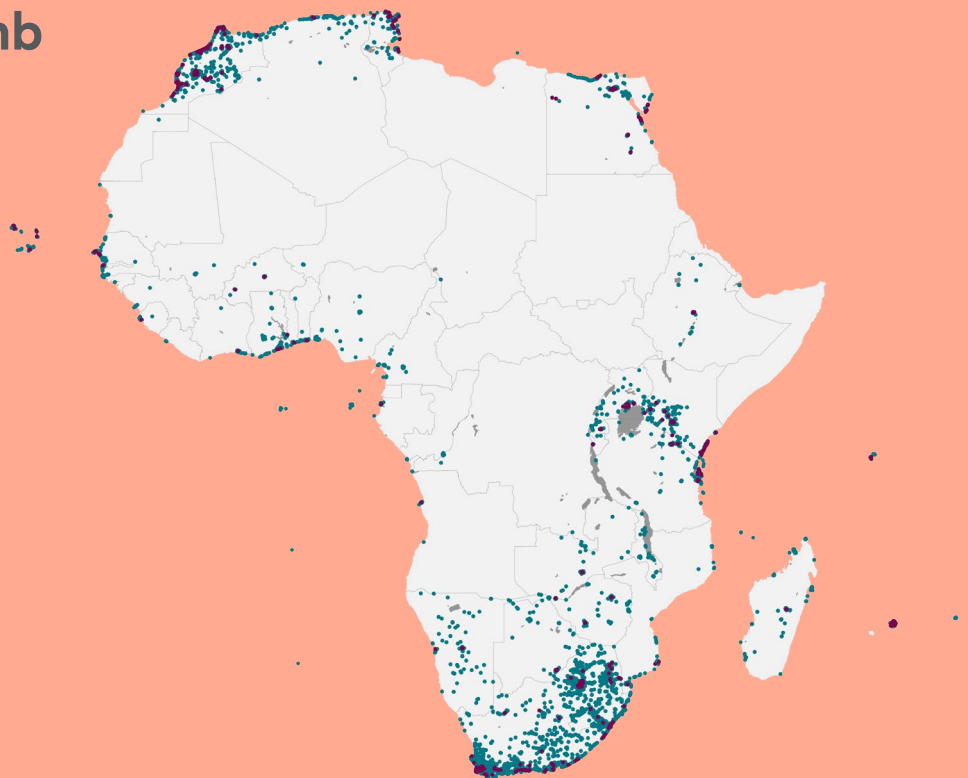


Where do guests go?

Listings on Airbnb visited in the previous year in Africa

● Booked listings between 1 September 2012 and 1 September 2013

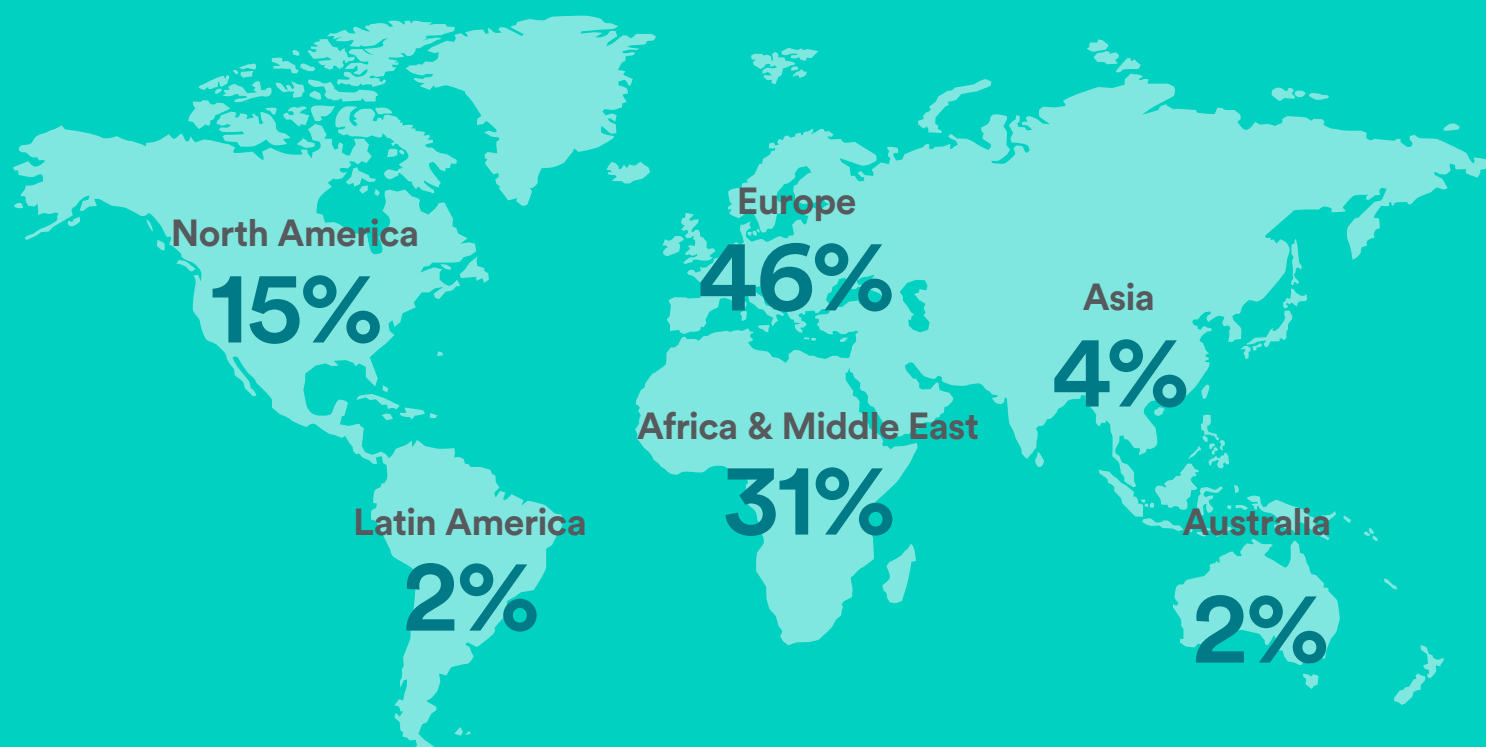
● Booked listings between 1 September 2016 and 1 September 2017



Overview of the Airbnb guest community in Africa

Guest origin

29% of guests who travel to Africa are from Africa



25% South Africa

13% France

2% Canada

2% Australia

12% United States

10% United Kingdom

2% Spain

2% China

8% Germany

3% Netherlands

Overview of the Airbnb guest community in Africa

Guest quotes

“The Airbnb ecosystem has been a game-changer, if you ask me. It has made the world, and its people, far more accessible.”

Travis
South Africa

“I always choose Airbnb and I’ve even stopped checking other accommodation options. It’s not about the price anymore but the comfort and the feeling you get of being home.”

Ainoa
Morocco

Case study: South Africa



Hosts on Airbnb in South Africa have been welcoming guests into their homes since 2010. The following page captures the Airbnb community in the country between 1 September 2016 and 1 September 2017.

Did you know?

1 in 5 guests are travelling as part of a family

1 in 6 hosts who welcomed guests are seniors

44% of South Africans who used Airbnb to travel, stayed in South Africa

South Africa is the leading country on the continent in total guest arrivals

Hosts & listings

43,400

Active listings on Airbnb

\$1,900

Annual earnings for a typical host

19

Nights booked for a typical listing

Guests

651,000

Inbound guests in the past year

143%

Inbound guest growth in the past year

Economic activity

\$86M

Income earned by local households

\$161M

Estimated guest spending

\$247M

Estimated economic activity generated by guests and hosts

Case study: South Africa

Experiences

Airbnb earlier this year launched Experiences, which locals can use to create and offer unique activities. Today, over 90 Experiences are available in South Africa, of which 15 percent are Social Impact Experiences, the proceeds of which go directly to a nonprofit, all helping to diversify the country's tourism offer and help South Africans turn their hobbies and passions into economic opportunities.



90+

Active Experiences

14

Active Social Impact
Experiences

\$25,000

Raised through Social
Impact Experiences

Case study: Morocco



Hosts on Airbnb in Morocco have been welcoming guests into their homes since 2010. The following page captures the Airbnb community in the country between 1 September 2016 and 1 September 2017.

Did you know?

Morocco is the second African country in total guest arrivals

88% more Moroccans have used Airbnb to travel than in the previous year

88% of guests visiting Morocco chose Airbnb to live like a local

Hosts & listings

21,000

Active listings on Airbnb

\$1,300

Annual earnings for a typical host

17

Nights booked for a typical listing

Guests

297,000

Inbound guests in the past year

68%

Inbound guest growth in the past year

Economic activity

\$22M

Income earned by local households

\$39M

Estimated guest spending

\$61M

Estimated economic activity generated by guests and hosts

Case study: Kenya



Hosts on Airbnb in Kenya have been welcoming guests into their homes since 2012. The following page captures the Airbnb community in the country between 1 September 2016 and 1 September 2017.

Did you know?

238% increase in domestic travel on Airbnb in Kenya compared to the previous year

46% of Kenyan host income is earned by women hosts

The collective earnings from hosting on Airbnb for Kenyans increased by 106% compared to the previous year

Hosts & listings

5,900

Active listings on Airbnb

\$970

Annual earnings for a typical host

18

Nights booked for a typical listing

Guests

39,500

Inbound guests in the past year

143%

Inbound guest growth in the past year

Economic activity

\$3.9M

Income earned by local households

Case study: Tanzania



Hosts on Airbnb in Tanzania have been welcoming guests into their homes since 2011. The following page captures the Airbnb community in the country between 1 September 2016 and 1 September 2017.

Did you know?

20% of total guest arrivals in Tanzania are from the US

Tanzania is the fifth African country in total guest arrivals

40% of Tanzanian host income is earned by women hosts

Hosts & listings

2,300

Active listings on Airbnb

\$1,000

Annual earnings for a typical host

17

Nights booked for a typical listing

Guests

24,000

Inbound guests in the past year

90%

Inbound guest growth in the past year

Economic activity

\$2.1M

Income earned by local households

Case study: Nigeria



Hosts on Airbnb in Nigeria have been welcoming guests into their homes since 2014. The following page captures the Airbnb community in the country between 1 September 2016 and 1 September 2017.

Did you know?

Guests in Nigeria stay on average 6.2 nights per trip and per guest

Nigeria is the fourth fastest growing country in Africa in total guest arrivals

Active listings in Nigeria have almost doubled since last year at 98% growth

Hosts & listings

730

Active listings on Airbnb

\$1,000

Annual earnings for a typical host

13

Nights booked for a typical listing

Guests

2,200

Inbound guests in the past year

325%

Inbound guest growth in the past year

Economic activity

\$400,000

Income earned by local households

All definitions

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