



Airbnb in South Africa: The Positive Impact of Healthy Tourism



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Introduction

Tourism has become a driving force of the global economy—especially in emerging destinations.

Travel and tourism today account for 10 percent of global GDP and one in every 10 jobs worldwide, and travel to emerging economies is expected to grow at twice the rate of travel to advanced economies from now until 2030¹.

But not all tourism is created equal. As the travel industry continues to grow, Airbnb promotes a unique, differentiated form of healthy tourism: tourism that is local, authentic, diverse, inclusive, and sustainable, versus mass travel that bottles up the economics of travel and can be environmentally less sustainable.

Airbnb is an online marketplace (also described as a platform) where travellers can discover and book unique accommodations and experiences offered by a community of hosts from around the world. At Airbnb, we believe that this form of people-to-people travel creates healthy tourism that benefits the hosts who share their homes and passions, the guests who are seeking authentic cultural experiences, and the local residents whose cultures, customs, and economies are celebrated and supported. Our vision is to use technology to help spread the benefits of tourism, previously kept in the hands of a few, to the many.

Africa is a prime example of Airbnb's commitment to this vision. The Airbnb community has grown rapidly across Africa—especially in South Africa—as guests from every corner of the world use Airbnb to visit, stay with local hosts, and participate in promoting a new, healthier form of travel.

Since Airbnb's founding, 2 million guests have arrived at listings on Airbnb in South Africa, and 3.5 million guests have arrived at listings across Africa as a whole, with roughly half of these arrivals occurring in just the past year.

These guests are creating significant economic benefits for the community of local hosts. As opposed to travel that is mass, corporate and less sustainable, travelling on Airbnb enables tourists to discover new destinations and helps to ensure that local residents directly benefit from tourism's economic growth. Since Airbnb's founding in 2008, hosts across Africa have earned over \$400 million in income from hosting².

In particular, a new analysis by Genesis Analytics helps to estimate the economic impact that Airbnb is having in South Africa. From June 1, 2017 through May 31, 2018, host and guest activity on Airbnb generated an estimated R8.7 billion (roughly \$678 million USD) in economic impact in South Africa. This economic impact corresponds to a total of over 22,000 jobs supported across the broader South Africa economy.³

¹ Sources: World Travel & Tourism Council; UNWTO

² As of May 31, 2018

³ For more detail, please see the Methodology section.



This impact also is being distributed across a wide range of hosts in South Africa. A significant majority—65 percent—of hosts on Airbnb in South Africa are women, and hosts across the country are using their extra income from hosting to make ends meet and otherwise afford to stay in their homes.

Airbnb is proud to organise the 2018 Africa Travel Summit, bringing together innovators in tourism and technology to share, discuss and debate how technology can be used to further accelerate inclusive and sustainable economic growth through travel across the African continent.

The Summit is one component of our continuing work to promote healthy tourism. In 2017, Airbnb announced a \$1 million investment through 2020 to promote and support community-led tourism projects in Africa. In partnership with local organisations, we have established the Airbnb Africa Academy, providing information and tools to support aspiring entrepreneurs from rural and under-resourced communities across South Africa. We have plans to extend this initiative to other countries across Africa in 2019.

Airbnb also has worked to expand use of the platform for Experiences across South Africa, helping more locals turn their passions into economic opportunities that showcase authentic travel experiences—including Social Impact Experiences that send proceeds directly to local nonprofit organisations.

Home sharing and Experiences are 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 52 percent of guests' spending in Africa occurring within the neighbourhoods where they stay, the financial impact of hosting can be significant for emerging travel destinations.

This report outlines the growth of Airbnb's healthy tourism and the impacts of the economic opportunities created for hosts in South Africa and beyond.

Since Airbnb's founding, 2 million guests have arrived at listings on Airbnb in South Africa, and 3.5 million guests have arrived at listings across Africa as a whole, with roughly half of these arrivals occurring in just the past year.

From June 1, 2017 through May 31, 2018, host and guest activity on Airbnb generated an estimated R8.7 billion (roughly \$678 million USD) in economic impact in South Africa. This economic impact corresponds to a total of over 22,000 jobs supported across the broader South Africa economy.

Since Airbnb's founding in 2008, hosts across Africa have earned over \$400 million in income from hosting, and hosts in South Africa have earned \$260 million from hosting.

In South Africa:

65%

Of home hosts
are women

82%

Of guests say they
are more likely to
return due to Airbnb

95%

Of hosts recommend
local businesses to
their guests

80%+

Of hosts engage in
eco-friendly practices





Healthy Tourism

Airbnb is promoting travel that is local, diverse and inclusive across Africa



Airbnb's rapid growth across Africa

At a time when travel is 10 percent of the global economy and growing, Airbnb is bringing healthy tourism to Africa, enabling guests to discover new destinations and seeing dramatic growth in emerging travel markets across the continent.

Since Airbnb's founding, 2 million guests have arrived at listings in South Africa, and 3.5 million guests have arrived at listings across Africa as a whole.

Of the top eight fastest-growing countries in the world for guest arrivals, three are located in Africa (Nigeria, Ghana, and Mozambique). And growth in guest arrivals is strong in top destinations across the continent.

YOY growth in guest arrivals⁴

South Africa

65%

Ghana

141%

Nigeria

213%

Kenya

68%

Rwanda

73%

Mozambique

136%

In fact, seven countries in Africa have seen guest arrivals growth more than double in the past year.

YOY growth in guest arrivals⁵

Nigeria

213%

Ghana

141%

Mozambique

136%

Côte D'Ivoire

113%

Algeria

105%

Egypt

104%

Zimbabwe

104%

Building on growing momentum across the continent, in 2017 Airbnb and Cape Town signed Airbnb's first city collaboration agreement in Africa. Under the agreement, Airbnb and the city are working together to promote the benefits of people-to-people tourism for Cape Town residents and their communities, bringing community-led tourism to townships and supporting greater economic and social empowerment. Since Airbnb's founding in 2008, of the 2 million guests who have arrived at listings in South Africa, roughly half of these arrivals have occurred in just in the past year.

⁵ As of July 1, 2018



Cape Town is the most popular South African destination on Airbnb, but guests are also discovering other destinations across the country. The past year has seen especially strong growth in guest arrivals for other cities across South Africa:

YOY growth in guest arrivals⁶

Johannesburg

79%

Durban

106%

Hermanus

77%

Plettenberg Bay

77%

Pretoria

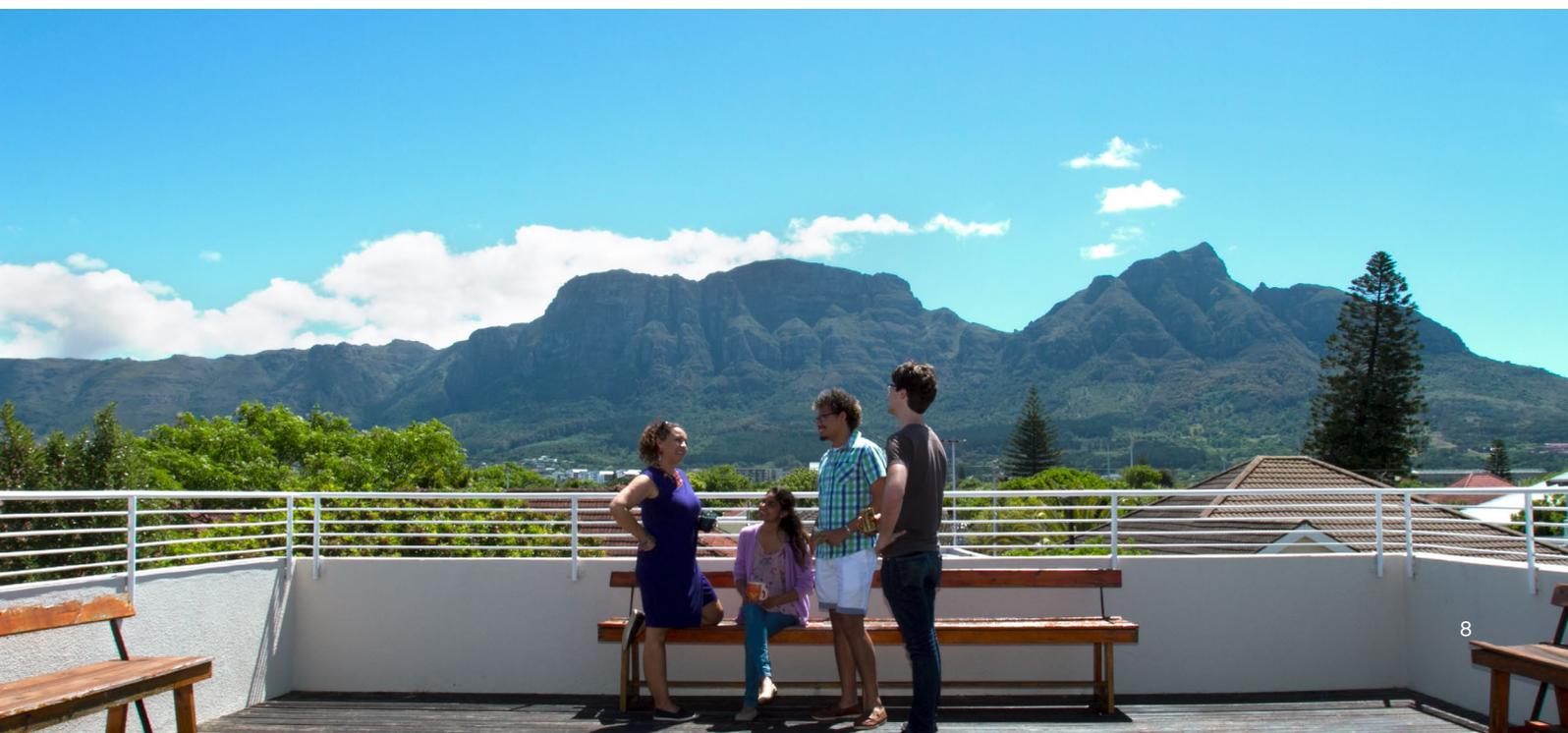
149%

George

88%

A portion of this growth represents incremental gains in tourism for the country: new travellers who would not have come to South Africa or stayed as long on their trip without the availability of listings on Airbnb. According to a survey of guests who travelled to South Africa in 2017, an overwhelming 82 percent say they are more likely to return to South Africa due to Airbnb. And 28 percent of guests say they would not have travelled to South Africa, or stayed as long, without Airbnb.

6 As of July 1, 2018





Creating a more local, authentic and sustainable travel experience

Survey data also demonstrates that guests are choosing to use Airbnb when they visit South Africa because they are seeking a different travel experience. The survey found that the majority of guests to South Africa chose to travel using Airbnb in part so they could live like a local and explore specific neighbourhoods.

What were the considerations that led to using Airbnb?

66%

of guests wanted to live like a local

81%

of guests wanted to explore a specific neighbourhood

Guests to South Africa also specifically view Airbnb as a more environmentally friendly, authentic way to travel, with greater benefit to the local economies where they are travelling.

How do you compare Airbnb to other accommodation options?

62%

of guests believe the environmental footprint is better on Airbnb

67%

of guests believe the benefit to the local economy is better on Airbnb

76%

of guests believe the authenticity is better on Airbnb

These percentages are nearly identical to global percentages representing all travellers who used Airbnb in 2017. Whether visiting South Africa or elsewhere around the world, travellers view Airbnb as a more sustainable, authentic form of travel that has more beneficial impact on local economies.

Not only are guests specifically choosing listings on Airbnb to explore local neighbourhoods, but they are also spending their tourism dollars in those neighbourhoods. Airbnb naturally enables tourism outside of the traditional hotel districts, ensuring local businesses and residents directly benefit from increased travel.

According to the survey of guests to South Africa, 52 percent of their tourism spending occurs in the local neighbourhood where they stay.

And because listings on Airbnb are often more affordable than other forms of accommodation, guests who choose to book using Airbnb have more money to spend at those local businesses. Many guests choose listings on Airbnb because they are a more affordable option than other forms of accommodation: 98 percent of guests to South Africa said they chose to stay at listings on Airbnb in part to save money. But these guests then spend the money they saved at other locations during their trip—for example, at local businesses. Fifty-two percent of guests using Airbnb in South Africa said they spent the money they saved on accommodations on other purchases and activities during their trip.

And hosts on Airbnb are doing their part to promote and enable this more local, sustainable form of tourism. According to a survey of South Africa hosts, 95 percent say they recommend local businesses (cafes, grocery stores, shops, cultural activities, and more) to their guests. And more than 80 percent of South Africa hosts report that they engage in eco-friendly practices (recycling, providing public transit info, green cleaning, and more) when they host.



Experiences on Airbnb: expanding the possibilities for healthy tourism

In November 2016, Airbnb launched Experiences—magical, handcrafted activities powered by local people that guests can book on Airbnb. Experiences are one-of-a-kind activities designed and hosted by locals. Unlike a typical tour or workshop, Experiences go beyond the activities themselves, offering a deep-dive into the local host’s world through their particular passion. Hosts offer their guests special knowledge, unique skills, and inside access to local places and communities that guests could not find on their own.

Since launching, Experiences have expanded from 500 in 12 cities to over 15,000 Experiences in more than 800 cities, including hundreds of Experiences available in Cape Town and dozens more in Johannesburg and Durban. Now open to hosts across all of South Africa, Experiences have rapidly grown to become another pillar of local, authentic travel.

Global growth in available Experiences

500
Experiences

November 2016



15,000+
Experiences

August 2018

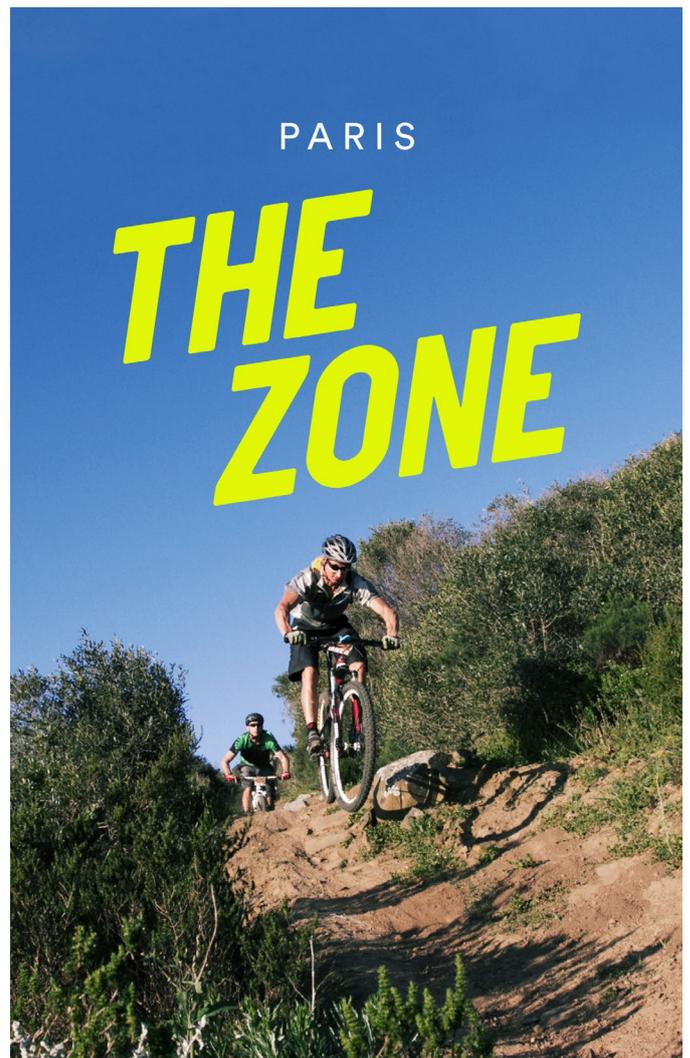
Global Experience bookings up over 1,100% in the past year

The introduction of Experiences on Airbnb creates new economic opportunities by helping people unlock their passions, talents and interests and earn money through hosting, catering to the hundreds of millions of people who use Airbnb's platform to discover unique and authentic travel opportunities.

Experiences is a platform for economic empowerment: Hosts keep 80 percent of what guests pay for an Experience, and they are fully in control of how and when they provide them. From Barcelona to Paris, to Seattle, to Florence, to Los Angeles, some of the most popular Experience hosts globally are on track to earn more than \$200,000 USD this year. In

South Africa, the average earnings for someone who hosts Experiences six times per month is \$14,000 USD annually. Those who host more frequently, 12 times per month, average \$18,000 USD annually.

Top Experiences in South Africa include "A jog in township with locals" offered by Ayanda and Buntu, who co-founded an initiative in Khayelitsha township dedicated to providing children with opportunities through sport. Tauriq takes visitors on a hike up the lesser-known trails of Cape Town's Table Mountain, while Rafiq guides them through the long history of the Bo-Kaap area.





Social Impact Experiences in South Africa

Social Impact Experiences build on the inherent good of travel using Airbnb, providing nonprofits a platform to fundraise and promote their mission while inspiring users of the platform to engage in social causes around the globe.

Each organisation decides what Experience will most help the communities they serve—whether it’s fundraising, building awareness, volunteering, or all of the above—and Airbnb waives its service fees so that 100 percent of the proceeds go directly to the nonprofit.

With these Experiences, Airbnb makes its global footprint and peer review system available to impactful organisations, including in neighbourhoods that are not normally on the tourist map. Immersing in a social cause, community, mission and vision of a nonprofit transforms people to act beyond the timespan of the Experience, creating long-term donors, volunteers, and ambassadors for a cause.

One example is the “Paddle with the Penguins” Experience in Cape Town. Founded in 2003, AfriOceans Conservation Alliance conducts marine environmental education and awareness programs that promote responsible tourism. Their Social Impact Experience gives guests the unique opportunity to kayak with African penguins at Boulders Beach near Cape Town. Prior to the launch of Experiences, AfriOceans was about to close—listing on Airbnb was a last desperate measure to generate some funds. Now, upwards of 1,000 guests have taken the “Paddle with the Penguins” Experience through Airbnb, and AfriOceans credits Airbnb with breathing new life into their organisation.

Another example is “Authentic downtown Joburg stroll,” a guided walk through inner-city neighborhoods in Johannesburg that gives guests the opportunity to see a misunderstood part of the community through an entirely new lens. The Experience is offered by local organisation Dlala Nje, which uses the funds raised from the Experience to provide a safe educational space and job opportunities for local youth.

~30%

**of Experiences booked
in South Africa are Social
Impact Experiences**



BONGANI

**ALL
ARTISTS
HERE**



Economic Empowerment

Airbnb is creating new economic opportunity
for hosts across South Africa



Estimating Airbnb's impact in South Africa

Airbnb has continued to grow rapidly across Africa, with millions of guests participating in a newer, healthier form of tourism. And in contrast to travel that is mass, corporate, and less sustainable, Airbnb enables these tourists to discover new destinations and helps to ensure that local residents directly benefit from tourism's economic growth. At a time when technology is displacing and replacing people in the workforce, travel on Airbnb is bringing significant economic benefits to Airbnb's community of hosts, including hosts in South Africa.

Airbnb commissioned Genesis Analytics to study the economic impact of home sharing on Airbnb across South Africa. The study's findings demonstrate the breadth of this impact and the ways that Airbnb is helping to create a new generation of entrepreneurs across the country.

From June 1, 2017 through May 31, 2018, host and guest activity on Airbnb generated an estimated R8.7 billion (roughly \$678 million USD) in economic impact in South Africa.

This estimated impact includes income earned by hosts using Airbnb, some of which is spent in the local economy, and expenditure by their guests on transport, tours, restaurants and other tourism and leisure activities (for more detail on the methodology, please see the Methodology section). This economic impact corresponds to a total of over 22,000 jobs supported across the broader South Africa economy.

Home sharing is helping people create new economic opportunities for themselves in the homes and communities where they live, and enabling emerging destinations across Africa to welcome more visitors in a scalable, sustainable way. With up to 97 percent of the accommodation charges remaining in the hands of hosts, the financial impact of home sharing can be significant for emerging travel destinations. Since Airbnb's founding in 2008, hosts across Africa have earned over \$400 million in income from hosting.

The Airbnb Africa Academy

As part of Airbnb's support for a new generation of entrepreneurs, Airbnb has partnered with Open Africa and the Social Enterprise Academy to create the Airbnb Africa Academy, an initiative to encourage healthy tourism and entrepreneurship in rural and under-resourced communities across the continent. Through the Academy, local hosts and co-hosts are provided information and tools that they can use to create listings on Airbnb's platform by utilising their spare room or their entire home, or by designing a unique Experience to further expand hosts' healthy and inclusive role in African tourism. The Africa Academy is part of Airbnb's \$1 million commitment to boost community-led tourism in Africa, and is supported by the World Bank Group.



“Airbnb gave me the opportunity to actually show people the real Soweto. Our history is not just history that you read . . . it's part of who we are. It's us.”

– Ntsiki, Soweto, Johannesburg

The first sessions of the Airbnb Africa Academy took place this year in Johannesburg on July 31 and August 1, and in Cape Town on August 3-4, working with 12 communities in Gauteng and the Western Cape. Fifty participants were interested in becoming hosts and co-hosts of Homes and Experiences on Airbnb. The two-day programmes covered subjects including ways of becoming a tourism entrepreneur, evaluating the tourism potential in local communities, navigating the Airbnb platform, understanding guest expectations, and information on the standards that apply to Superhosts. Each participant was provided with the opportunity to experience the Airbnb platform firsthand, participating in an Experience and spending the night in a home listed on Airbnb.

Airbnb is excited to share more learnings from the Africa Academy at the Africa Travel Summit, and we are looking to scale the programme by working with community-based and grassroots organisations in South Africa and Kenya, with plans for a potential expansion to two additional markets in Africa in 2019.



“We need to educate people, and I'm hoping that by doing this Experience . . . the youth who are unemployed can realize that we have it within ourselves. You can make it.”

– Lindiwe, Soweto, Johannesburg

Airbnb's thriving community of hosts

Airbnb is helping to develop a growing community of new entrepreneurs across Africa. With dramatic growth taking place across the continent, the Airbnb platform is enabling a wide range of hosts across Africa to directly benefit from these new economic opportunities. For example, Airbnb's community of hosts in South Africa has grown to over 35,000, and the significant majority of them (65 percent) are women.

Women are not only a disproportionately high percentage of Home hosts in South Africa, but also lead several incredible Experience offerings across the country. Hosting on Airbnb is creating new opportunities for enterprising women, enabling them to open their homes to guests or create Experiences that feature their neighbourhood or their unique skills to earn some additional income. Many women entrepreneurs are launching business ideas on the Experiences platform around the world, a global community of women hosts that continues to grow.

With the recent launch of Experiences in Johannesburg, Victoria Adasonia took the opportunity to launch a Social Impact Experience in support of her NGO, Woman with a Mission, which creates opportunities for women to become entrepreneurs and offers mentorship and guidance. Victoria started hosting her "Explore local shops with a stylist" Experience on Airbnb in June, and takes guests on a journey to better understand fashion and the role it plays in building self-confidence while discovering local shops. A highlight of the tour, she says, is meeting one of Nelson Mandela's personal tailors. With money raised through her Experience, Victoria is able to help more women build their confidence through workshops, seminars, life coaching and more. She also has encouraged other women from her foundation to sign up on Airbnb as hosts for a new source of extra income.

“This technology really creates opportunities,” Victoria says. “We can do what we love to do . . . It’s also really helped us to spread the word about what we do. It has been a challenge to raise money for Woman with a Mission. Now we have an office, staff, and we are able to . . . raise awareness and create more opportunities for women.”

The popularity of hosting is spreading across the Woman with a Mission organisation. Philisine hosts a Zulu-language Experience in Johannesburg. By building awareness of her cause through her Experience, she hopes to attract more successful women as mentors to support other women and communities.





Meanwhile, in the Bo-Kaap, Fayruza opens her home for a Cape Malay cooking experience incorporating food, history, culture, great company and a lot of laughs. Her Experience is so popular that it has earned over 100 five-star reviews on Airbnb, and now she is printing her own cookbook.

“My Experience is about showcasing community, and sharing food and culture in my bustling family home,” Fayruza says. “People love that it’s about the food, but they also love that my family come and join us and help fold samosas and make curry. And for me, I feel like I’m travelling without leaving home.”

Formerly an airline steward before a career in senior management for a security company, Fayruza took ill a couple of years ago and decided to scale back her career in favour of a less stressed lifestyle.

“Becoming an Experience host on Airbnb has been a personal journey for me,” she says. “I made a conscious decision to change my life and pursue what I love, which has always been food. But I’m a single mom, so I needed to work. My niece suggested I rent out my spare room on Airbnb and that’s when I discovered the Experiences platform. My family home is big and I love entertaining and love having people around my table so I thought ‘I can do this.’”

“I’ve been able to stay at home since September, working how I want and when I want. I will be on medication for the rest of my life and I will always need to watch my stress levels, but Airbnb has given me a quality of life I’ve never had before.”

Another host on Airbnb, Ntsiki, explains that Experiences was the platform she needed to forge her own career as a tour guide, having worked for tour companies previously. Her “Don’t watch Soweto, be part of Soweto” Experience shows both the touristy side and the “not so touristy” side of the township.

“I noticed a lot of companies are doing an injustice to Soweto, showcasing it as if it’s dependent on our history,” she says. “I try to mix the history with the current for a true experience of Soweto.”

“I didn’t want to just do the same tours every day with a company. I wanted to grow and work on my own set of rules. I don’t want to sound like a book or audio guide. With Airbnb, I am myself and I tell my story. Soweto is like writing a story every day. When you are here you become part of the story.”

Hosts are earning extra income that helps them make ends meet

Hosts across South Africa are making extra income, welcoming tourists that are exploring destinations and neighbourhoods that don't typically benefit from mass tourism. Since Airbnb's founding in 2008, hosts in South Africa have earned nearly \$260 million from hosting.

A large percentage of hosts on Airbnb in South Africa are hosting as part of efforts to supplement their income as a freelancer, part-time worker, or parents. According to a survey of hosts who hosted at least one guest in 2017, roughly half of hosts in South Africa report that they are a freelancer, work part-time, or are a stay-at-home parent.

And according to the survey, roughly half of hosts across some of the most popular African countries on Airbnb report that they use this extra income to help make ends meet and afford staying in their home.

	Typical host earnings in past year (USD)	Percentage of hosts who use Airbnb earnings to help make ends meet	Percentage of hosts who use Airbnb to help afford staying in their home
South Africa	\$1,900	46%	47%
Morocco	\$1,200	45%	51%
Kenya	\$920	55%	57%

In South Africa, 61 percent of hosts surveyed report their primary reason for hosting is additional income, which they use for a wide range of important expenses.

24%

of hosts spend their earnings on household expenses

18%

of hosts spend their earnings on home improvement

15%

of hosts spend their earnings on rent or mortgage

Additionally, 5 percent of hosts surveyed reported that their extra income from hosting helped them avoid foreclosure. Extrapolated across Airbnb's entire community of hosts in South Africa, that could potentially represent over 1,700 hosts who avoided foreclosure thanks to their income from hosting.



Airbnb's continuing commitment to healthy tourism in Africa

Airbnb is proud to organise the 2018 Africa Travel Summit, bringing together innovators in tourism and tech to share, discuss and debate how technology can be used to further accelerate inclusive and sustainable economic growth through tourism on the African continent. And Airbnb views the Summit as only the beginning of its work. Airbnb will continue to invest in South Africa as a unique opportunity to support community-led tourism and empower a new generation of entrepreneurs.



Methodology

The economic impact has been modelled for a one-year period from June 1, 2017 to May 31, 2018, using applicable data drawn from Airbnb's records, Airbnb's annual survey of hosts (1,788 respondents), and Airbnb's annual survey of guests (651 respondents). Airbnb provided input data that included total guest arrivals, guest nights, total host earnings, average daily spending and breakdown by category, host earnings spent by category, and host industries of employment.

The impact of total spending of hosts' income and of total guest spending on items other than accommodation through Airbnb is modelled through a Social Accounting Matrix (SAM) to derive wider benefits to the economy. A SAM is a static, modelled representation of all transactions that take place within an economy, including monetary flows between productive activities (economic sectors), commodities, factors of production (labour, land, capital) and institutions (business, government, households). A 2012 SAM is used for this economic impact assessment, based on 2012 Supply-Use Tables and labour market and household survey data, see www.wider.unu.edu/database/2012-social-accounting-matrix-south-africa.

Regarding the modeling of hosts' income: Some hosts on Airbnb are establishments like small hotels and B&Bs; others are private households. The spending of these groups might be differentiated, however there is no feasible way of determining which of the hosts fall in the former group and which in the latter. Thus, the assumption is made that all hosts are private households.

Regarding gross versus net benefits: The total economic impact results represent the gross benefit of Airbnb to the economy over the period, not the net benefit.

Glossary of Terms

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.
Guest:	Airbnb community members who stay in listings on Airbnb.
Host:	Airbnb community members who rent space or share an Experience on Airbnb.
Guest Arrivals:	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:	Hosts can classify their listing as one of three different types: Entire Home / Apartment listings, Private Room Listings, or Shared Room Listings:
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.
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 such as the kitchen, living room, and / or a bathroom with the host.
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 such as the kitchen and/or a bathroom with the host.
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 community of hosts on Airbnb. Airbnb community members who rent space on Airbnb.