The use of the Airbnb Collaborative Platform in Romania: A Survey-Based Research

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Abstract: Recent years have witnessed a wide and strong development of the sharing economy in various industries. As a result of the wide spread of intelligent mobile devices and customers' increasing digital skills, the use of collaborative platforms in tourism, in particular for accommodation services, has become an important alternative for many tourists. In this paper we try to investigate relevant aspects of the profile, motivations and habits of the Romanian tourists who are using Airbnb for renting accommodation services. Survey-based research was conducted during the summer of 2021, a period when very few COVID-19-related restrictions were being enforced in Romania regarding people's mobility and travel. The questionnaire was designed to capture not only the demographic, economic and social profile of the consumers, but also and more importantly the main aspects related to the type of travel (leisure versus business), the motivations of getting involved in the collaborative use of platforms etc., from a demand-side perspective. We have grouped the motivations for using Airbnb taking into account the following main classes of factors: price; comfort; ease of use and functionality; authenticity and local connection. Other investigated issues pertained to analyze the place of Airbnb compared to classical accommodation units, considering factors such as trust and efficacy. We found that there is a certain amount of conformity among the population in making the decision to book accommodation, but there is also an innovative trend, expressing people's desire to try other forms of accommodation that offer authenticity and new experiences, characteristics that are less common in traditional accommodation forms. Indirectly, we can identify several trends in respondents' preferences for tourist accommodation and consumption habits. Trends may include greater availability of accommodation alternatives, including through collaborative platforms and, gradually, the transformation of these alternative experiences into tourism consumption habits.

Keywords: collaborative platforms, accommodation, Airbnb, Romania

1. Introduction

Traditionally, the travel and hospitality industry were organized and operated in a "linear" manner, in the sense that accommodation and tourist transport services were provided by companies with their own means of production (or rented), with employed specialized staff (from drivers and pilots, to hoteliers- receptionists, cleaning staff or chefs). In addition to these providers, we also add intermediaries, i.e. travel agencies and tour operators, which reserved and distributed seats, rooms, built stays and holiday packages, through which consumers were helped (or influenced) to choose the desired option from several existing alternatives. The vast majority of these activities were carried out in specialized companies, legally registered in tourism activity.

The last decades marked by globalization, the democratization of travel, the impact of digital technologies, the Internet and communications, have also left their mark on domestic and international tourism. The tourism industry has reacted (somewhat slower compared to other economic activities), and gradually the elements of the digital economy, the revolution generated by the Internet, modern reservation and management systems have spread in this area as well.

However, the transformations have not stopped here, and while most "classic" intermediaries have entered, in part or in full, the online environment, a new range of intermediaries has emerged, offering to travelers similar services to those of traditional, "linear" business, but in a very different way, which could be described as "circular" (Belleflamme & Ha, 2020). Whether we are talking about leaders as Airbnb (in the short-term accommodation industry) or Uber (for urban transport), or a handful of small online intermediaries, their activities are characterized by an important element - they do not have the means to provides the service, they act as a platform, facilitating the interaction between those who want a service and providers (owners and / or entrepreneurs). As a European Parliament report (2017) states, the sharing of goods and services between individuals is nothing new in itself, economic history can provide many examples in this regard, but in the current

period, the development of the Internet and the creation and development online platforms have made sharing easier than ever.

Throughout this paper, we have tried to understand and analyze the main characteristics and aspects of Romanian tourists, type of travel and motivations, when engaging in collaborative use of platforms, from a demand perspective. In order to do that, we have used the results of a survey applied in 2021 and developed a sample-based study. Thus, the paper is structured as follows: after this part of introduction on the context and motivations of our research, we continue with a theoretical and literature background related to the transformations of the hospitality and travel industry brought by the new realities of the collaborative economy, as well as the worldwide and regionally impact and performance of the leader in the field - Airbnb. We also added some considerations regarding the profile and expectations of consumers of the services offered by the collaborative platforms. Then, in the next sections our focus concern research methodology, analysis and the interpretation of the results. In the end, we have drawn conclusions, also issuing several recommendations on economic policies.

2. Theoretical background

The sharing economy could be found in literature under various definitions and terminology (Araújo, 2021), as peer economy (Zervas, et al., 2017), collaborative economy (Paulauskaite, et al., 2017), collaborative trade (Sigala, 2015), hyper connectivity economy (Rifkin, 2015), a new socioeconomic system (Tussyadiah & Pesonen, 2016) or a hybrid alternative economic model (Rifkin, 2015), (Dredge & Gyimóthy, 2015).

All these approaches, sometimes near, sometimes discordant, start from a few common elements. Thus, most approaches recall that the collaborative economy includes activities of sharing of underused resources, i.e. their owners make them available to other individuals, reproducing the supplier-consumer relationship (Belleflamme & Ha, 2020). However, the approach is quite general and insufficient for the diversity of forms of manifestation of this economy. To complement it, the analysts consider some features of this collaborative economy need to be discussed (Botsman & Rogers, 2010), (Hamari, et al., 2015), (Belleflamme & Ha, 2020), such as (1) the existence and continued development of digital platforms, which reduce transaction costs and facilitate interaction between suppliers and consumers; (2) decentralization trends and the partially informal nature of consumer-provider relations; (3) innovative governance of relationships, gradually replacing traditional economic interactions, (4) networks and assessment systems that build trust between individuals who cannot interact face to face, increase value as networks grow and repeat interactions; (4) the disruptive, innovative but also destructive character of the new economy, which generates conflicts and tensions not only between traditional suppliers and representatives of the new economy, but also between various stakeholders (segments of society, generations, local public administrations, local communities, property-owners and tenants) generating risks and decisions almost unimaginable two or three decades ago (Guttentag, 2015), (Aguilera, et al., 2019), (Zervas, et al., 2017).

The shared economy is therefore a booming phenomenon, and traditional tour operators and tour operators perceive this as a threatening situation, increasingly disadvantageous. As of 2017, reports indicate that in the European Union, tourism is one of the sectors most affected by the collaborative economy (European Parliament, 2017), by this disruptive potential, to replace a property with the temporary use of products and services in many areas.

For tour operators, not only is the rapid advance of private housing rentals alarming, but also the expansion of this economy in other areas such as caravan rentals, pleasure boats, various tourist transports etc. Moreover, the traditional operators see another very worrying aspect, this time in the demand area - younger tourists are the ones who choose such offers. In 2017, according to PwC studies, more than half of the users of collaborative tourism platforms were between 18 and 39 years old (Beutin, 2018), and year after year the proportion and number of those who choose these platforms tend to increase, the new generations being much more willing to these forms of tourism. Younger tourists are not only motivated by lower prices, even if half of them consider it an important aspect of their trip, but also by novelty, perception of authenticity, informal relationships, networking, etc. According to Fes, many of the representatives of this generation, the so-called millennials associate the idea of "holiday package" with the expressions as "heteronomy", "mass processing" or "a kindergarten for adults" (Fes, 2019).

3. Airbnb – facts and figures

The emblematic figure of the collaborative economy in tourism is Airbnb, a company that in less than a decade has become one of the most powerful players in the field of accommodation and more. Even though their innovative offerings, companies such as Airbnb have contributed to the development of the short-term accommodation market, statistics and studies show that most of their current market shares come from a decrease in the shares of existing companies. For example, the impact of the Airbnb offer differs across industry segments - very important in relation to budget and low-end hotels and motels, equilibrate with mid-range hotels, and almost none with high-end hotels.

Airbnb has become a global phenomenon in recent years, and without being spared much controversy, debate and crisis since its launching in 2008, it is still an extremely valuable company with a lot of potential. Publicly listed in December 2020, Airbnb were valued at about US \$ 75 billion. Airbnb's market growth has been (relatively) steady, from about \$ 24 billion in 2015 to \$ 30-31 billion in 2016 and 2017, \$ 38 billion in 2018, and a drop to about \$ 35 billion in 2019 (Statista, 2020), (companiesmarketcap.com, 2021). At the end of 2021, its market value exceeded \$ 100 billion (companiesmarketcap.com, 2021), even when, at the beginning of 2021, this target of \$ 100 billion seemed uncertain due to the impact of the COVID-19 pandemic on the tourism market and international travels.

While the rapid growth of Airbnb has received mixed reactions from specialists and the media (from strong enthusiasm to severe criticism due to the business model that exacerbates the housing crisis for locals in tourist cities, the spread of illegal rentals and problems security), the company has developed a large number of loyal users, interested in tourism and travel alternatives considered (subjectively or not) more "authentic" and cheaper compared to traditional hotel offers. While Europe, the Middle East and Africa (EMEA) and North America, respectively, are some of the most productive and profitable markets, Latin America has the most nights with Airbnb / travel, on average, than any other region in the world, with an average of over four nights, while in other regions the average was between two and three nights per booking (Statista, 2020).

Airbnb's total global revenue reached US \$ 3.38 billion in 2020, a sharp decline (after more than 6 years of sustained growth), mainly due to the impact of the coronavirus pandemic, which caused disruptions and restrictions for travel around the globe. However, the pace of Airbnb revenue growth in the 2014-2021 period (with available data) is impressive, from \$ 0.42 billion in 2014, doubled in 2015 to nearly \$ 1 billion, and then to steadily growing, to a high of about \$ 4.81 billion in 2019. For the first three quarters of 2021, partial data shows a considerable turnover of almost \$ 3 billion, impressive for the difficult conditions of this year.

Airbnb, beyond the alternative of accommodation offers, allows consumers to book so-called "experiences" in the regions they visit. From 2017 to 2019, Airbnb reported year-over-year growth in booked nights and experiences worldwide, from 185.8 million in 2017 to 250.3 million in 2018 and nearly 327 million in 2019. In 2020, the number of nights and experiences booked until September 30 was reported at 146.9 million, a decrease of 180 million over the previous year, this decrease was mainly due to travel restrictions caused by the coronavirus pandemic (Statista, 2020; Stiubea et al, 2021).

In regional terms, in 2019, the region with the most nights and experiences booked with Airbnb worldwide was Europe, the Middle East and Africa (EMEA), with 139 million bookings, followed by North America (96 million bookings) and Asia Pacific (over 58 million). Latin America reported the lowest number of bookings (34 million), however, Latin America region had the highest average number of nights for each Airbnb booking in 2019, while the EMEA ranked third after North America.

The impact of COVID-19 on Airbnb bookings has been considerable, with many countries restricting international and domestic travel in 2020 to prevent the spread of COVID-19, and the tourism industry has been hardest hit by this change. Given that Airbnb's business model relies heavily on the tourism industry, the company saw a decline in bookings in 2020. Thus, in the first quarter of 2020, Airbnb bookings declined rapidly to about 90% compared to the previous period, and the decrease gradually tempered in the second half of the year. In evolution, we find that the average number of overnight stays on each Airbnb reservation tends to decrease quite quickly in the four years analyzed (and we still do not have data for the pandemic year 2020!), between 10 and 25%.

With a lower share of collaborative economy in total GDP (0.05%, in 2016) Romania is placed in one of the last places, at European level (European Commission, 2018). Even if the collaborative services in Romania are not used on a large scale, they have a tendency to increase, fueled by the interest of the young population for such services. Also in Romania, the most active users of these services prove to be the generation of millennials, a factor that has significantly contributed to the growth of the collaborative market - they travel more often and spend more on travel than any other generation. During their travels, they are looking for personalized, unique and authentic experiences. Thus, collaborative economy services such as Airbnb, Couchsurfing and Uber allow users to enjoy the places they travel in more authentic ways than if they had stayed through traditional accommodation services or used traditional services. All these collaborative services can be accessed very easily, through convenient and intuitive applications.

The accommodation capacity on the existing Airbnb collaborative platform in Romania is approximately 15,000 accommodation units (AirDNA, 2020), whether we refer to apartments, whole houses or spaces shared with other people.

Table 1: The main Airbnb indicators for the 5 most important tourist cities in Romania (in 2018)

Indicators / cities	București	Cluj- Napoca	Brașov	Sibiu	Constanța
Active rentals	4234	2194	1066	837	2385
Active hosts	1923	975	658	544	1448
Average daily rate (euro)	35	41	39	39	79
Percentage of whole house rentals	80%	78%	77%	71%	77%
Average occupancy rate	61%	54%	59%	52%	41%
Average number of guests/rentals	3,8	4	4,1	4,5	4,5
Annual growth	69%	180%	89%	103%	145%

Source: (AirDNA, 2020)

AirDna reports also confirms the rapid evolution in the number of listings in these cities. For example, in 2013, in Bucharest there were 312 accommodations for rent, but in 2016 there were 3541, and 4234 accommodations in 2018; an average annual increase with 70% in the last five years (AirDNA, 2020). Most of the Airbnb offers are 2-room apartments - 1,557 (53%), followed by 3-room apartments, 692 (24%), and then we have 472 studios (16%) (AirDna.co, 2019). The average rating of over 145,000 reviews of Airbnb accommodations is 4.7 out of a maximum of 5 stars. The average occupancy rate is between 37% in January and 66% in September. The average daily fare is stable throughout the year, around 35 euros (AirDna.co, 2019).

In a survey conducted by the European Commission, the benefits of services provided through collaborative platforms and their level of consumer satisfaction, could be concentrated in the answers to the question "Would you generally recommend services offered on collaborative platforms or not?". Thus, approximately 9 out of 10 respondents in Romania claim to recommend to others the services provided through collaborative platforms (European Commission, 2018). In fact, this situation is not typical for Romania. In all EU Member States, most users recommend the services offered through collaborative platforms, confirming the trend of increasing acceptance of the collaborative economy.

4. Research design

In order to investigate the relevant aspects regarding the profile, motivations and practices of the Romanian tourists using the Airbnb platform for accommodation rental, we conducted a survey in Romania between May and July 2021 and developed a sample-based study. The survey was carried out online and the questionnaire was distributed by using the online application Google Forms. The questionnaire was posted on various specialised tourism groups, Facebook, WhatsApp, with the majority of respondents being Facebook and WhatsApp users. Few responses were received from posting the survey on tourism specific platforms. The questionnaire consisted of three parts and comprises overall a combination of closed-ended (Yes/No) questions with pre-determined choice questions, with an overall number of 23 questions. In this paper we focus on highlighting the main characteristics of Romanian tourists, but also on the main aspects related to the type of

travel (leisure versus business), motivations for engaging in collaborative use of platforms etc., from a demand perspective. Given that the questionnaire includes questions of interest to all consumers, it could be applied to a broad spectrum of respondents, not just those in a particular field or those with a certain level of education. The questionnaire was applied online and we received a total of 196 responses from Romanian tourists. Main description of the sample is as follows (Table 2):

Table 2: Main description of the sample

Characteristics	Category	Relative frequency (%)	Characteristics	Category	Relative frequency (%)
Gender	Female	65%		Country	32%
	Male	35%	Place of work	Country	
Monthly household net income	2000 lei - 3499 lei	59%	Place of work	Urban	68%
	3500 lei - 5999 lei	23%		Orban	
	6000 lei - 8499 lei	10%		20 years old or less	6%
	8500 lei - 12.000 lei	8%		21 – 30	28%
Education level	High school or vocational school	9%	Age	31 – 40	20%
	University studies	69%		41 – 50	35%
	Graduate/professional degree	1%		51 – 60	10%
	PhD	21%		61 – 70	1%

Source: authors' contribution

Through the analysis of our sample, we found that the respondents of the questionnaires were 65% women, and 35% men, having a job in urban areas - 68% and 32% in country areas. The most represented age group was the 41-50 years, with 35% of the total, followed by the age group of 21-30 years with a percentage of 28%. The group in the category of 31 - 40 years old accumulates 20% of the total, while in the age category of 51 - 60 it represented a percentage of 10%. The respondents who were under 20 years old, totaled a percentage of 6% and, finally, the respondents over the age of 60 represented 1%. Regarding the respondents' income, we observed that most of them, respectively 59%, had the total net monthly income of the household between 2000 lei and 3499 lei, followed by the households that have a net monthly income between 3500 lei and 5999 lei and were in proportion of 23%. They were followed, in a percentage of 10% by the persons who have the total monthly net income of the household between 6000 lei and 8499 lei. The lowest percentage was represented by the persons who answered that they had a net monthly income of the household between 8500 lei and 12,000 lei, respectively 9%. The results obtained after classifying the respondents by the four categories regarding the level of education, we observed that most of the respondents, respectively 69%, answered that they had higher education, 21% of the interviewees had doctoral or postdoctoral studies. The percentage of respondents who graduated only high school is 9%, while only 1% have only a professional specialization (graduate / professional degree).

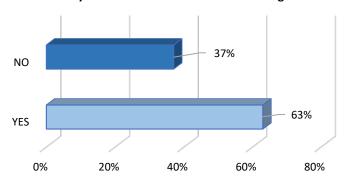
5. Findings and discussion

Through this study we aimed to identify a number of relevant issues regarding efficiency and acceptance, respectively the use by respondents in Romania of the collaborative platform Airbnb. We are interested in finding out how popular the Airbnb platform is by respondents and to what extent they are willing to give up traditional accommodation for collaborative accommodation and what are the characteristics that Airbnb accommodation must have in order for people to give up to the traditional accommodation in favor of the collaborative one.

As preliminary results, we will briefly present the main findings concerning the following investigated issues:

Have you booked accommodation through Airbnb? When we took the survey, we found that more than half of the respondents, 63% or 123 people, did not book accommodation through Airbnb. The percentage of those who have used this platform was 37%, representing 72 people. The fact that the majority of respondents did not use Airbnb is to be expected, given the novelty of the concept and the lack of promotion of Airbnb in Romania.

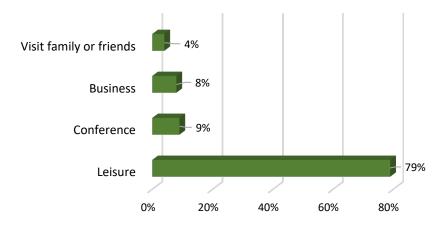
Have you booked accommodation through Airbnb?



Source: Own representation

Figure 1: The share of people who booked or did not book accommodation through the online Airbnb platform

What was the purpose of your trip? The majority of respondents travelled for leisure purposes, respectively 79% of them. Those who travelled to attend a conference, convention or other event accounted for 9%, while 8% of respondents said the reason for their trip was business-related, and 4% of respondents stated that they travelled to visit family or friends. Even if we record percentages for purposes other than relaxation and leisure, we can still see that most respondents travel for relaxation.



Source: Own representation

Figure 2: The main purpose of the respondents' trip

Regarding the reasons for tourists choosing Airbnb over traditional accommodation we used a number of factors such as price, comfort, authenticity, new experiences, safety, the main factors that determined people to choose such a reservation. All these factors were determined based on statements based on between 3 and 7 items (Table 2). Considering that all the analyzed items were evaluated on a 5-point Likert scale, ranging from "1 = strongly disagree" to "5 = strongly agree", in our analysis we determined the mean values, the median and the mode of each item. Thus, based on these items, we tried to find an answer to the question "What are the reasons for tourists choosing Airbnb over traditional accommodation?". The results obtained are presented in the Table 3, below.

Table 3: The decision to book through the Airbnb platform instead of another form of accommodation

The items regarding		Median	Mode			
The price						
I chose Airbnb because it has relatively low costs	3.92	4.00	4.00			
Airbnb accommodation has helped me reduce my travel costs	4.01	4.00	4.00			
I chose Airbnb because I want high quality accommodation at a lower rate	4.01	4.00	4.00			
Comfort						
I chose Airbnb for the convenient location	4.08	4.00	4.00			
I chose Airbnb for the access to home facilities	3.94	4.00	4.00			

The items regarding	Mean	Median	Mode			
I chose Airbnb for the "home" feeling	3.51	4.00	3.00			
I chose Airbnb for the large accommodation space	4.04	4.00	5.00			
I chose Airbnb because the app is easy to use	4.00	4.00	4.00			
I chose Airbnb because it has the instabook function	3.75	4.00	3.00			
I chose Airbnb for the cancellation policy	3.78	4.00	4.00			
The authenticity of the accommodations						
I chose Airbnb to have an authentic local experience	3.47	4.00	4.00			
I chose Airbnb to receive useful local information and tips from my host	3.33	3.50	4.00			
I enjoy interacting with the locals	3.43	4.00	4.00			
New experiences	New experiences					
I thought the Airbnb accommodation experience would be interesting	4.10	4.00	4.00			
I wanted to do something new and different	3.78	4.00	4.00			
I thought the experience was going to be unpredictable	3.26	3.00	3.00			
To have an experience that I could tell my friends / family about	3.32	3.00	4.00			
To have a unique experience	3.46	4.00	4.00			
Safety						
I felt safe during my Airbnb booking	4.43	5.00	5.00			
The area where I was staying was a safe one	4.46	5.00	5.00			
I'm unsure if the Airbnb booking works legally	3.04	3.00	2.00			

Note: 1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree and 5 = strongly agree

The price of accommodation booked through Airbnb was a significant factor in choosing Airbnb services. Thus, one of the main attributes of Airbnb, namely the lower price compared to the traditional accommodation price, proved to be an important factor when respondents booked accommodation through Airbnb. According to the results presented in Table 2, we can see that most of the respondents agree (mode = 4) with the statement that they chose Airbnb because it had relatively low costs

The majority of respondents considered the comfort of Airbnb accommodation as an incentive to use the platform. All items were appreciated by respondents, especially those who referred to the large accommodation (the mean = 4.04) space and convenient location (the mean = 4.08) provided by Airbnb hosts. The majority of respondents considered the Airbnb platform's cancellation policy and ease of use as the main functional attributes of the platform. In addition, 42 respondents agreed or strongly agreed that the instabook (one-click booking) feature is an opportunity for users.

We found that the authenticity of the accommodations listed on Airbnb was preferred by respondents. They expressed an affinity for authentic local experiences and interaction with locals. This fundamental characteristic of Airbnb adds value to the platform and is a great advantage over traditional industry competitors. However, most respondents used traditional means to book their trip. The following is a review of the main reasons why respondents chose not to use Airbnb's accommodation services. We noticed that most responses to the items on the trust factor fell into the categories: strongly disagree, disagree and neutral. Thus, this factor was not decisive in the decision not to use the services of the Airbnb collaborative platform.

The Airbnb platform was not used because, for the most part, it is neither known nor promoted. Therefore, 40 of the respondents gave the reason for not using the platform as not having enough information about how the platform works. It can be inferred that the high number of neutral responses reflects the lack of information about the Airbnb platform among the Romanian population.

6. Conclusions

Following our survey research, based on a comprehensive nationwide questionnaire, we have a (probably partial) picture of people's perception of collaborative versus traditional tourism in Romania. We investigated the demographic, economic and social profile of the consumers, but especially, the main aspects related to the type of travel (leisure versus business) and the motivations for engaging in collaborative use of the Airbnb platform.

We have discovered that there is a certain amount of conformism among the population in making the decision to book accommodation, but there is also an innovative trend, expressing people's desire to try other ways of staying that offer authenticity, new experiences, characteristics that are less found in traditional tourism. Based

on our analysis we believe that the Airbnb collaborative platform can make an important contribution to employment and tourism growth if encouraged and developed responsibly. Due to the COVID-19 pandemic, Romanian tourism has undergone similar, if not identical, protocols of lockdown and social distancing, which required adjusted regulations. Consequently, tourist became more interested in smaller accommodation units, adequate for one single family and which provide opportunities for cooking meals by their own. According to the survey we conducted, collaborative platforms and mostly Airbnb can contribute to the recovery of tourism sector in Romania. Our findings are limited due to the small number of respondents. However, the small number represents itself a symptom that needs thorough attention. Further studies are needed to investigate attitudes, behaviours and motivations regarding the use of collaborative platforms and what is their contribution for the future of accommodation sector.

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