Chapter 7:
The sharing economy and its role in metropolitan tourism

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Abstract

The "sharing economy" has been growing rapidly in recent years. In particular, the popular book by Rachel Botsmann and Roo Rogers "What's Mine is Yours" (2010) and the emergence of a number of large players in the sharing business, such as Uber and Airbnb, have sparked controversy on the nature of sharing and how it affects the metropolis.

Although sharing is by no means a new phenomenon (Belk, 2010: 715), it has experienced a significant boost. This has been facilitated by the possibilities offered by the internet, especially the interactive options of the "social web" (Behrendt et al., 2011). However, alongside the mere economic aspects of online sharing, there are also a number of sociological and psychological drivers involved, especially with regard to tourism (Germann Molz, 2014). In tourism, the main effect of the sharing economy has been on the accommodation sector. Sharing websites such as couchsurfing.org and airbnb.com serve as matchmakers between potential hosts offering idle housing capacity and potential guests seeking suitable accommodation (Germann Molz and Gibson, 2007; Picard and Buchberger, 2013). However, what makes sharing websites so special is that, in addition to offering visitors to metropolitan areas overnight stays at little or no charge, they promise real, authentic experiences and personal encounters with local residents going about their everyday lives in the city (Pappalepore, Maitland and Smith, 2010: 228; 2014: 234).

The aim of this chapter is to explore what collaborative consumption in tourism means to "explorer tourists" (Griffin, Hayllar and Edwards, 2008: 55) seeking authentic experiences off the beaten track and outside the "tourist bubble" (Judd, 1999; Maitland and Newman, 2009). The chapter opens with an introduction to the basic characteristics of the sharing economy, focusing on the relevant theoretical concepts of hospitality in urban tourism. Based on empirical findings from a variety of questionnaires, an outline of the respondents' socio-demographic structure follows. We will then proceed to analyse their reasons for sharing accommodation, and their expectations. Empirical evidence shows that – in addition to the monetary aspect, which of course plays a role – there is a wide range of non-monetary motives for sharing accommodation. These motives include host/guest interaction, the individuality and design of the accommodation, and the specific location.

A secondary aspect addressed in the chapter explores the side effects of Airbnb as a stakeholder in urban transformation and gentrification processes. These issues include the transformation of residential housing into holiday rentals as well as the increasing number of visitors in residential neighbourhoods and the consequences that result, such as noise, waste and crowded streets, as well as a change in the retail infrastructure (Füller and Michel, 2014). The chapter concludes with an illustration of the policy steps the government in Berlin has taken up to this point to steer the manifestations of the sharing economy in a sustainable direction.

Key Words: Touristification, Sharing Economy, Visitor Experience, Authenticity, Airbnb

1 Introduction

The “sharing economy” has been evolving rapidly in recent years, with Airbnb becoming one of the largest actors within this business segment. However, in addition to pure market share, the Californian online platform for peer-to-peer room and apartment rentals has also sparked a large controversy on the nature of sharing and how it affects the metropolis. The latter line of discourse in particular will be the central element of the following chapter, focusing on the way in which Airbnb influences the development of residential neighbourhoods in Berlin.

Within the wider framework of this book, which intends to illuminate the linkages between gentrification and tourism, this chapter focuses on Airbnb as a new stakeholder in the hospitality industry and its implications on urban transformation processes in Berlin. As gentrification in general is a multidimensional and highly complex field of research, the results presented here focus on stakeholders’ perspectives. We aim to explore what collaborative consumption in tourism means to “explorer tourists” (Griffin, Hayllar and Edwards, 2008 p. 55) seeking authentic experiences “off the beaten track” and outside the “tourist bubble” (Judd, 1999; Maitland and Newman, 2009). The empirical basis consists of quantitative online and face-to-face questionnaires among the target group of Airbnb guests, as well as in-depth qualitative interviews with Airbnb hosts and guests in Berlin.

This research approach makes it clear that we have concentrated our empirical work primarily on the reasons and motivations of hosts and guests who participate in sharing economy businesses. As a result, the following paragraphs illuminate the motives of participants in online sharing platforms as well as the experiences of both the demand and supply side made by using Airbnb. The empirical results provided below are lastly discussed against the background of current urban developments in Berlin, such as gentrification, and the government’s initiatives intended to tame the rapid rise of such room and apartment “sharing” platforms.

2 The sharing economy in gentrified neighbourhoods and the role of Airbnb

Ever since Rachel Botsman and Roo Rogers’s “What’s Mine is Yours – How Collaborative Consumption is Changing the Way we Live” became a bestseller, the “sharing economy” has become a buzzword in current debates in society. Originally regarded as a result of economic decline following the financial crisis in 2008-2009 (Heinrichs and Grunenberg, 2012: 2), today’s connotation has shifted so that the term is used in many contexts. These range from discussions about collaborative consumption supporting environmentally friendly practices – in line with the sustainability paradigm – to criticism of capitalist consumption patterns and self-expression as a post-materialistic lifestyle. Different factors drive this development. Above all, the internet and its function as an enabler and facilitator of the matchmaking process between the demand and supply side of goods and services represents the heart of the sharing economy (Linne, 2014: 9). For a long time, high transaction costs and a lack of critical mass inhibited the resale and reuse of second-hand products or products that are used only temporarily. Constant access to the mobile internet, together with the emergence of large commerce platforms such as eBay, provided the basic conditions required to make the sharing economy and its sub-industries accessible and manageable for large parts of society (Behrendt, Blättel-Mink and Clausen, 2011).

This boom was not only supported by technological transformations, but also in participants’ value systems – particularly in trend-sensitive and trend-responsive environments. Changing values towards post-materialistic positions play a similar role here, as people's awareness of sustainability issues increase. The blurring of a previously clear differentiation between the producer and the consumer and the resulting hybrid form of the "prosumer" (Surhone, Timpledon and Marseken, 2010) was not a new phenomenon of the sharing economy. This has been discussed in depth, particularly in tourism, mainly with regard to the role played by consumers in co-creating the tourist experience (Günther, 2006: 57; Kagermeier, 2011: 57 et seq.; Pappalepore, Maitland and Smith, 2014). Along these lines, Nora Stampfl has asserted that, "Sharing is nothing new; it has always been part of human co-existence" (2014: 13; author's translation) and the same applies for sharing activities in tourism.

Consequently, in this chapter the sharing economy is not considered to be a fundamental paradigm shift. Instead, it is understood as an evolutionary development of existing societal and behavioural transformations, which is certainly being accelerated by the aforementioned multi-dimensional shift in values. Due to the leading role played by the internet and the wide range of social media options available, these transformations have gained a previously unknown dynamism with unforeseeable ultimate consequences. Considering the central driving forces behind sharing offers in tourism, it can be assumed that the search for "authentic" visitor experiences (Gilmore and Pine, 2007) may play a major role. For a long time, visitors have been yearning for off-the-beaten-track experiences outside the confined lines of the tourist bubble, particularly in city tourism (Judd, 1999, Freytag, 2008; Maitland and Newman, 2009; Stors and Kagermeier, 2013; Stors, 2014).

Airbnb seems to fulfil these needs. The internet platform is one of the major actors in the sharing business and probably the one with the highest impact on the tourism industry. The company is a 2007 San Francisco start-up with an innovative internet-based business model and disruptive potential (Guttentag, 2015). The online platform offers the possibility for ordinary people to rent out their homes as accommodation for visitors. As a result, this new option to leave the tourist bubble and to stay at a private person's place opens up spaces for tourists that were previously mainly used by the local population. In addition, locations with the highest Airbnb density, such as Prenzlauer Berg, Kreuzberg and Neukölln in Berlin (Skowronnek, Vogel and Parnow, 2015, see Figure 1 as well) are often hit by large-scale urban transformation processes such as gentrification in general (Holm, 2013: 175; Krajewski, 2013: 26).

So-called "explorer-tourists" searching for contact and interaction with the local population appreciate this specific spatial pattern. According to Pappalepore, Maitland and Smith (2014), people visit these creative urban areas in order to accumulate or display their cultural capital. They have similar preferences as the group of pioneers that live in such locations (Krajewski, 2004) and they frequent the same cafés, restaurants, second-hand stores, and local art markets as well as the nightlife infrastructure. All in all, the tourists' way of producing and consuming the urban space is very similar to the one observed by user groups that are generally characterised as pioneers and gentrifiers, so that the behaviour of both groups can be described as "conspicuous consumption" (Beauregard, 1986). Consequently, the various interests of the illustrated actors supplement each other. The city users, regardless of being a long-term inhabitant, a temporary migrant or a weekend visitor, likewise co-produce the urban experience (Edensor, 2001; Pappalepore, Maitland and Smith, 2014). With a particular regard to the urban infrastructure, we argue that the additional demand created by the visitors – either from within or outside the city – makes the supply of certain goods and services in the neighbourhood just profitable enough. It also may happen that local businesses change their product range towards the visitors' desires due to these persons' elevated purchasing power. This means the loss of a local daily supply of goods and services for the neighbourhood's long-term inhabitants, which has been currently described as retail gentrification (Cócola-Gant, 2015; Zukin et al., 2009). In some specific cases, the perceived social carrying capacity has already been exceeded by large influxes of tourists to certain areas. Residents feel disturbed by party and nightlife noise, close to clubs but sometimes also within Airbnb apartments, and rubbish lying on the streets. They then no longer perceive the visitors as a positive element within their living environment. This situation has occurred in some parts of Berlin, such as Warschauer Brücke and Simon-Dach-Straße (Bezirksverordnetenversammlung Friedrichshain-Kreuzberg 2014), where political initiatives have already taken place to steer the immense tourism and nightlife economy demand in a more socially responsible direction (Der Tagesspiegel, 2015; Berliner Morgenpost, 2016); a later section of this article looks at these concerns.

3 Airbnb in Berlin and its implications

Based on the outstanding position of Airbnb in Berlin in comparison to other German cities (Kagermeier, Köller and Stors, 2016 p. 72 et seq.), it seems reasonable to primarily focus on Berlin to analyse Airbnb's implications for the city's housing market in particular and for the interplay between tourism and gentrification in general.

3.1 The scope of Airbnb in Berlin

At the end of 2014, official figures about the volume of the Airbnb business in Berlin were released for the first time. According to a study that Airbnb commissioned and that the GEWOS institute conducted, the figures illustrated that within 12 months a total of 13,802 apartments were booked via Airbnb; 69% (9,267) of these were entire apartments and 30% (4,193) single rooms. GEWOS (2014) then calculated the ratio between the 9,467 Airbnb flats booked in Berlin within the one year timeframe and the city's total housing stock of 1,883,161 flats in 2013 (Amt für Statistik Berlin Brandenburg, 2016b). The outcome was that only 0.5% of all apartments in Berlin have ever appeared on the Airbnb webpage, regardless of being let regularly or just one single time. They further noted that entire homes rented for more than 120 days a year – a number that indicates a professional type of renting and the dedication of the apartment to a holiday home – accounted for only 0.06% of all apartments in Berlin (GEWOS, 2014).

Besides this Airbnb study, another completely independent research project was conducted by the University of Applied Sciences Potsdam. Students at the Faculty of Design documented all available Airbnb offers in Berlin that were online on one single day in January and again in February 2015. The data was accessed via Airbnb's API on 11 January 2015 and 25 February 2015 (Skowronnek, Vogel and Parnow, 2015). They found about 11,700 offers, which include fully let apartments, private and shared rooms. If only entire flats are taken into account, the number amounts to 7,714 flats that were online on one single day in Berlin, which equals about 0.4% of all apartments (Skowronnek, Vogel and Parnow, 2015). The students further found a total of 34,418 offered beds, which is on average 2.9 beds per Airbnb flat.

These figures provide an initial quantitative approach to understanding the extent of Airbnb use in Berlin. They show that about the same number of apartments are listed on the Airbnb webpage as the number of flats built annually since 2013 (Investitionsbank Berlin, 2015a: 36). Particularly against the background of current urban developments in Berlin, including the increasing housing shortage (Holm, 2016c) fuelled by a net influx of about 40,000 people annually – not counting refugees (Investitionsbank Berlin, 2015b: 12) – and the concomitantly rising rents (see Section 3.3), these figures must have been an alarming signal for the city's government, which decided to pursue an uncompromising course against apartment letting via Airbnb. This was done because the Berlin Senate Department for Urban Development and the Environment feared a large-scale transformation of regular flats into holiday homes, leading to a further decrease of affordable housing. Their efforts to protect the Berlin housing market against short-term rental resulted in the Misappropriation Ban Act (*Zweckentfremdungsverbot-Gesetz*; Senatsverwaltung für Justiz und Verbraucherschutz Berlin, 2013), which basically prohibited the conversion of regular apartments into holiday homes (Senatsverwaltung für Stadtentwicklung und Umwelt, 2016a). The law came into effect in May 2014 (Senatsverwaltung für Justiz und Verbraucherschutz Berlin, 2014) with a transition period of two years. At the end of April 2016, all holiday apartments had to be registered and licenced at the respective district administration. Otherwise, the host may be punished by a fine up to €100,000. The Berlin Senate Department for Urban Development and the Environment recently stated that about 6,300 holiday apartments had been reported at district administration offices; of these, only 87 received permission (Blume, 2016). Despite this immense effort, the actual number of full apartments let out via Airbnb decreased between 26 April and 25 May 2016 from 6,760 to 5,860, according to another data analysis conducted by the students from the University of Applied Sciences Potsdam (Blume, 2016: 6). All in all, this illustrates that Berlin's government has made a great effort to prohibit the transformation of residential units into holiday homes, but with only marginal results to show for it. In addition, it appears necessary to ask if the government's fight against Airbnb is truly an intervention against rising rents and displacement, or if the online sharing platform simply became a scapegoat for the complex and expensive challenge to provide enough affordable housing for the city's rising number of inhabitants.

After having discussed the actual number of Airbnb flats, the following section deals with the spatial distribution of Airbnb listings in Berlin. Figure 1 shows that most of the urban neighbourhoods – which are called LOR (=Lebensweltlich Orientierte Räume) and represent the lowest administrative level in Berlin (Senatsverwaltung für Stadtentwicklung und Umwelt 2016b) – are only very slightly affected by Airbnb phenomena. Out of the 447 LOR units, in about 100, not a single Airbnb offer could be identified in spring 2015. Another 169 urban neighbourhoods saw one Airbnb listing or fewer per 1,000 inhabitants. At the same time, the concentration of the phenomena to a few LOR units can clearly be identified on the map. Nine LOR neighbourhoods exhibit a density of more than 20 Airbnb offers per 1,000 inhabitants. Concentration in the districts of Mitte, Friedrichshain-Kreuzberg and Pankow (especially the southern part around Prenzlauer Berg) is clearly visible. Thus the density of Airbnb beds is especially high in the central parts of former East Berlin. These are also the neighbourhoods which have been affected the most by the gentrification process since reunification (Bernt, Grell and Holm, 2013; Krajewski, 2013).

In a nutshell, although the share of Airbnb apartments measured as a portion of the total housing stock in Berlin is comparatively low (Skowronnek, Vogel and Parnow, 2015), in certain areas of the city that have been greatly affected by different types of gentrification (Holm, 2013) professional apartment letting via Airbnb and other short-term rental platforms (mainly since the Misappropriation Ban Act came into effect) has especially increased this housing shortage even further (Blume, 2016, Holm, 2016b).

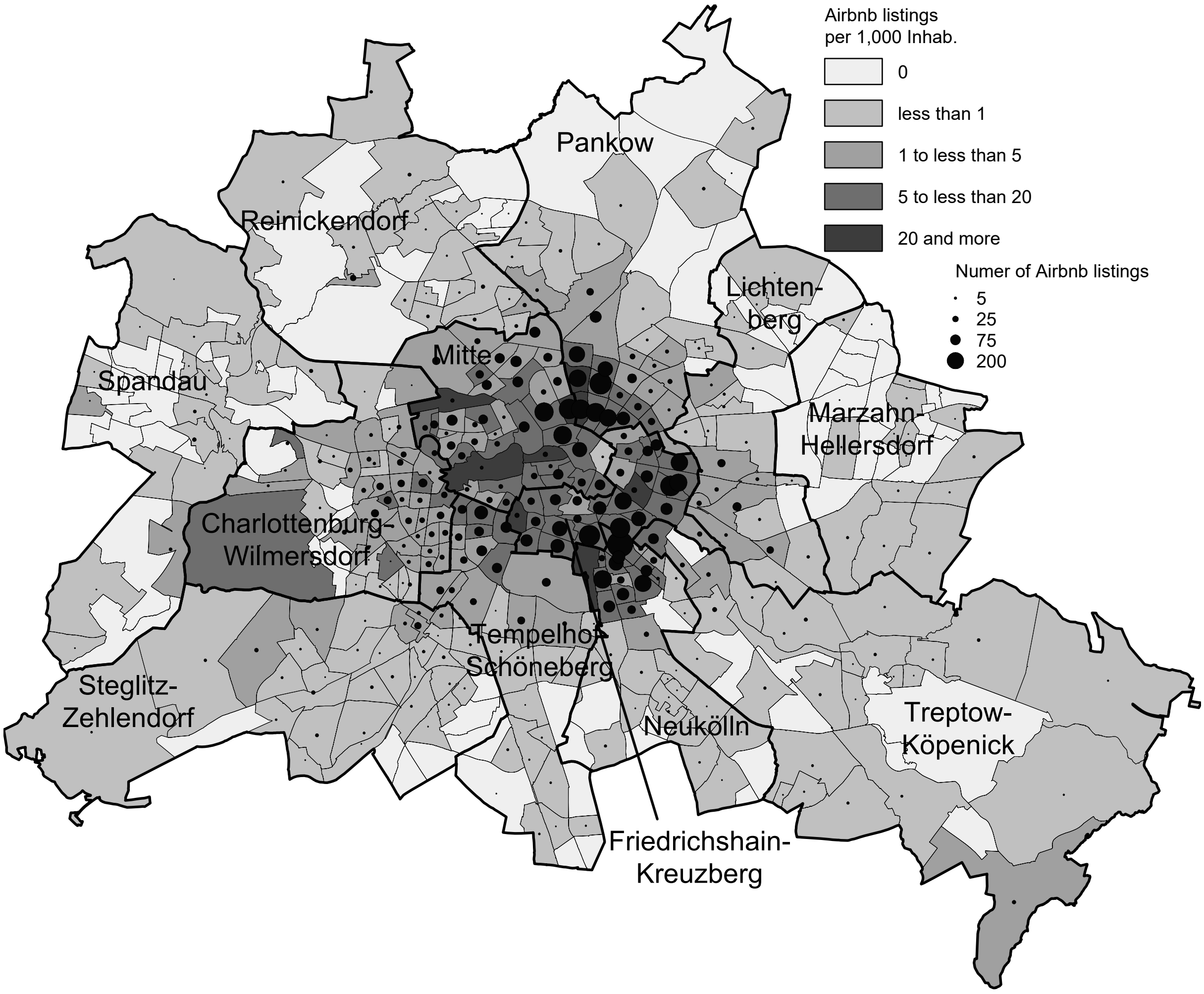

Figure 1: Airbnb in the urban neighbourhoods of Berlin
(Source: Own design using data from Skowronnek, Vogel and Parnow, 2015; Land Berlin 2015 and Senatsverwaltung für Stadtentwicklung und Umwelt Berlin, 2016b)

3.2 Implications of Airbnb on Berlin's hotel industry

From the perspective of Berlin's hotel industry, measures against the competitor Airbnb could be interpreted as an expression of structural problems within the hospitality industry. Hotel options in Berlin have expanded significantly in the 25 years since reunification. An overcapacity of hotel rooms and the accompanying decline of incomes could explain the industry's fears about facing this new competitor. However, statistical figures rebut this presumption. Since 1992, the number of beds has increased by 222% (see Figure 2; Amt für Statistik Berlin-Brandenburg 2016d). Simultaneously, Berlin is among the most dynamically growing destinations in Europe. While the number of guests and overnight stays rose by 130% to 140% in German cities overall in this time (Statistisches Bundesamt 2015; see also Kagermeier 2015: 209), overnights in Berlin rose by 265% and arrivals by even more, 274%. Within the last five years, the demand for hotel rooms has grown faster than supply, so that the occupancy rates of Berlin hotels have continued to improve (Deloitte 2013: 6).

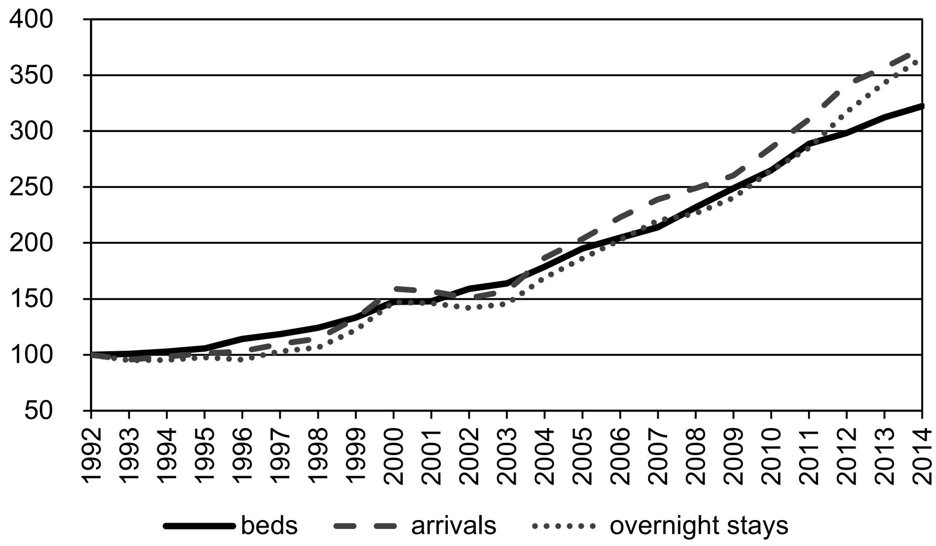

Figure 2: Development of the indexed accommodation capacity in Berlin and the arrivals and overnight stays of tourists between 1992 and 2014
(Index 1992 = 100; Source: Own design using data from: Amt für Statistik Berlin-Brandenburg 2016c)

In comparison to the aforementioned 30.25 million officially registered guest nights in Berlin (Amt für Statistik Berlin-Brandenburg, 2016c), the number of Airbnb nights of about 2.6 million between 1 January 2015 and 1 January 2016 seemed acceptable (Airbnb, 2016). The platform itself states that 20,200 hosts offered their rooms and apartments to about 568,000 guests who stayed for approximately 4.6 nights on average (Airbnb, 2016). Taking into account private overnight stays at friends or relatives (the VFR segment) as well, which amounts to about 32.5 million overnights in Berlin (Berlin Tourismus & Kongress GmbH, 2015: 4), the number of Airbnb nights appears even more modest. Compared to the combined number of private and officially registered overnights in Germany's capital, which is more than 60 million, the proportion of Airbnb nights is around 4% of all generated overnight stays by visitors, despite the high media coverage and enormous criticism of the platform regarding its contribution to housing shortages, rising rents, and even evictions.

3.3 Airbnb and the touristification process in Berlin

The figures above illustrate that no general inefficiencies in the Berlin hotel market can be identified. Moreover, continuously rising guest arrivals keep hotel occupancy rates at a high level of 60.5% (Amt für Statistik Berlin-Brandenburg, 2016d), while hotel rooms cost on average €86. This is relatively cheap in comparison to other German cities, such as Munich (€110) or Hamburg (€101) and considerably less expensive than hotel rooms in other European metropolises, such as London (€165) and Paris (€139) (HRS, 2015).

The total number of Airbnb listings available in Berlin, which amounts to about 15,000, according to data collected by the internet platform Inside Airbnb (Cox, 2015), is also significantly less than in other leading tourism destinations in Europe, such as Paris (45,000) and London (42,000) (Cox, 2016a and b).

However, media coverage and protests against Airbnb – ranging from occupying holiday apartments (Beitzer, 2016, Holm, 2016a; Jacobs, 2016) to large anti-Airbnb billboards in affected neighbourhoods (Mai, 2016) – seem to be much more intense than in other cities, such as Paris (Gravari-Barbas and Jacquot, 2016), even though these other cities have significantly more Airbnb listing.

But why is there such a debate around it? One part of the explanation is surely Berlin's relatively immature mass tourism history, which started after the reunification but which really took off with the rapid increase of tourism overnight stays and guest arrivals in 2003 (see Figure 2). This development coincides with or has been co-initiated through a boom for low cost carriers in Germany (DLR, 2015) and has made Berlin a techno and party tourism destination for the so-called "easyjetset," (Rapp, 2009). Since the majority of clubs are historically located in the less developed and much cheaper areas of the Eastern part of Berlin, the nightlife infrastructure and gastronomic options in these areas encouraged an influx of specific tourism demographic groups.

Since the early 2000s, also the city's tourism marketing has used the underground images of these emerging districts as being ethnically diverse, tolerant, creative and hip in order to promote them as appealing destinations for "authentic" urban tourism (Füller and Michel, 2014: 5). At the same time, gentrification processes catalysed "[r]ising rents and a growing perception of neighbourhood change [that] dominated local media reports and the public discourse" (Füller and Michel, 2014: 5) in these neighbourhoods. In particular, the southeastern part of Kreuzberg and northern parts of the district of Neukölln – both currently experiencing relatively high densities of Airbnb apartments – experienced an increase in rents that was above the city average, while high unemployment rates remained (Füller and Michel, 2014). Holm (2013, 179) found that despite rent increases from 23% to 30% between 1999 and 2008 in the southern neighbourhoods of Kreuzberg, the transformation has not yet led to a displacement of poor and lower-class residents. Nevertheless, the area faced a large influx of households with higher incomes (Holm, 2013: 179) as well as an economic transformation: "[N]ew bars, restaurants, cafés, bicycle shops, small art galleries and independent fashion labels opened weekly" (Füller and Michel, 2014: 5f) due to initially lower rents compared to districts like Prenzlauer Berg or Mitte. Finally, the image of Kreuzberg and the northern part of Neukölln has shifted from being known as a "ghetto" (Best and Gebhardt, 2001 in Füller and Michel, 2014) to "the epicentre of cool" (Dyckhoff, 2011) within 10 years.

2011 was also the year in which the "Berlin does not love you" stickers appeared for the first time in Berlin (Novy, 2013) and the Green Party of the district of Friedrichshain-Kreuzberg invited the residents for an initial roundtable discussion on the topic "Help, tourists are coming" (ntv, 2011). This was also the year in which protests against tourism in residential neighbourhoods of Berlin started (see also Colomb and Novy, 2017).

The brief section above illustrates that tourism and gentrification processes were heavily intermingled even before Airbnb entered the market. However, the financial crisis of 2008-2009 and the resulting investment in the real estate market have further exacerbated the situation in Berlin's housing market. In areas where immigrants and the creative industries could find cheap apartments for the past 20 years, rising investment has led to rents that are no longer affordable for many of the city's residents. Real estate prices have risen by more than 65% since 2007. This is a relatively high figure, but similar magnitudes of rent increases have occurred in other comparable cities. In Munich, for example, real estate prices have risen by about 80% (Jung 2015) in the same time span. Comparatively, real estate prices in Berlin (at approximately 3,500 €/m^2) are only about half the amount of prices in Munich (at approximately 6,500 €/m^2) and still much lower than in Hamburg or Cologne (Wohnungsbörse, 2015). Nevertheless, if we focus on rent increases in recent years, Berlin does have a leading position. Since 2007, rents have risen by almost 50%, whereas in Munich or Hamburg, they have risen by only one-third (Jung, 2015). Nevertheless, the rents in Berlin are still well below the level of many western German cities. Due to its new function as the German capital and the attractiveness of Berlin for young people of the creative class in particular, the city has witnessed a net migration gain of about 40,000 inhabitants per year (Amt für Statistik Berlin-Brandenburg, 2016a, not taking into account the additional number of refugees in 2015). In other words, the expected effect of banning Airbnb totally would have been offset by the migration gain within a couple of months. Moreover, when looking at the type and price of professionally let apartments on the Airbnb webpage – which is officially forbidden now in terms of short-term rental according to the Misappropriation Ban Act – it becomes clear that returning these apartments back into the traditional rental market would not solve the problems illustrated by Holm (2016) and Investitionsbank Berlin (2016) that major deficiencies in affordable housing continue to exist, particularly for households with lower incomes.

The rapid, significant rise in rental rates is certainly one important reason for the inhabitants' sceptical positions towards Airbnb. The city government also quickly identified the platform as contributing to the aggravation of the housing shortage and rising rents. Nevertheless, as Section 3.1 describes, its effect is much too small to be held responsible for the general housing problem in Berlin.

4 Methodological approach

The empirical research leading to the results discussed below did not focus primarily on the discussion about Airbnb in Berlin. The interest has been more oriented to basic research on the motivations of participants in the sharing economy on the one side, and the experiences of Airbnb hosts and guests in Berlin on the other. Nevertheless, these findings might contribute valuable insights to the discussion on gentrification and touristification processes in urban centres.

4.1 An overview of sharing economy participants based on online surveys

A digital questionnaire was created to obtain an initial outline of the socio-demographic and motivational structure of sharing economy participants. The main objective of this online survey was to identify people's reasons for participating in the sharing economy (Kagermeier, Köller and Stors, 2015). In order to collect this data, convenience sampling was conducted involving students, employees and mainly young Tourism Studies graduates from Trier University (Germany). Sampling resulted in 271 completed questionnaires. Due to this specific selection, it cannot be claimed that the results are statistically representative of the German population as a whole. As Heinrichs and Grunenberg (2012: 13) illustrated, there is a high positive correlation between the age, level of education and income of sharing economy participants. By selectively addressing mainly young academics, our sample contains a disproportionately large number of "social-innovative collaborative consumers" (Heinrichs and Grunenberg, 2012: 14; similar to Nielsen, 2014: 9). Compared to the German population, one-quarter can be assigned to this group of social-innovative collaborative consumers (Heinrichs and Grunenberg, 2012: 14). Regarding the awareness of internet platforms that offer overnight stays, the bias becomes even more striking. According to a GfK survey representative of the general population, two-thirds of the population are unaware of offers such as Airbnb (Marquart and Braun, 2014), whereas in our sample, only 1.5% did not know of such possibilities. However, focusing on such a target group enabled more precise statements to be made on their motivations for taking part in sharing activities, which was the main reason for conducting the study. Regarding methods, in order to explore the initial results generated by the online survey in greater depth, the use of structured interviews with Airbnb hosts and guests in Berlin took place, leading to a qualitative study.

4.2 The motivations of Airbnb hosts and guests

A specific segment of the large number of collaborative consumption offers was identified and analysed in order to gain a clear picture of sharing economy participants. For the purposes of this paper, it makes sense to focus on the segment of private accommodation within the sharing economy relevant to tourism, which has gained considerable media interest in recent years. While this small section of the sharing economy is characterised by multiple suppliers, our analysis focuses solely on the market leader, Airbnb.

Since the number of Airbnb hosts in Berlin is considerably large – there are more than 11,700 (Skowronnek, Vogel and Parnow, 2015) units available – it was not possible to contact all of them. Instead, the number of requests was based on the number of listings in Berlin's districts. The most important districts were those with the largest numbers of listings, which were Prenzlauer Berg, Friedrichshain, Kreuzberg, Neukölln and Berlin Mitte. More than 1,000 Airbnb units are available in each of these districts. A total of 46 interview requests were sent in these areas, resulting in 13 interviews. In the districts with listings between 250 and 1,000 (Schöneberg, Wilmersdorf, Charlottenburg, Moabit and Wedding), at least one interview was conducted. Fewer Airbnb hosts were contacted and interviewed in other neighbourhoods. After a one-week interview pre-test in March 2014, interviews were conducted over the space of four weeks in August and September 2014. Despite the relatively short data collection period, more than 100 requests were sent to Airbnb hosts, resulting in 25 personal interviews. This extensive data provides a solid basis for conducting an in-depth analysis of motivational structures and interaction between Airbnb hosts and guests.

To further illuminate the Airbnb guest perspective, it would have been desirable to conduct extensive qualitative interviews with the group of guests as well. However, since they are extremely difficult to approach, data about this group was gathered using a multi-method approach. Socio-demographic characteristics were determined from general studies on participants in the sharing economy and carefully applied to Airbnb users. In addition, the online questionnaire provided information on socio-demographics and motivations of Airbnb users, although the number of Airbnb guests in our convenience sample is clearly relatively small. We also distributed a primarily quantitative questionnaire in German and English to our interviewed Airbnb hosts in Berlin to pass on to their guests. As might be expected, the response rate of these questionnaires was quite low. Finally, we also intended to directly interview Airbnb guests when they were with their hosts. This approach resulted in five guest interviews, the results of which are also presented in the next section.

5 Motives for participating in Airbnb

As the quantitative oriented survey showed (Kagermeier, Köller and Stors, 2015), the main target groups of the share economy in tourism are younger tourists. These findings regarding the respondents' age structure are similar to those generated by the quantitative questionnaires distributed to Airbnb hosts. This group also has experience in other segments of the sharing economy, such as online and offline swapping, buying and selling goods, and hiring people for services; additionally, the group has a medium income level.

In order to conduct a more detailed characterisation of the respondents beyond simply socio-demographic figures, we created a profile of their personalities using a five-point Likert Scale (Figure 3).

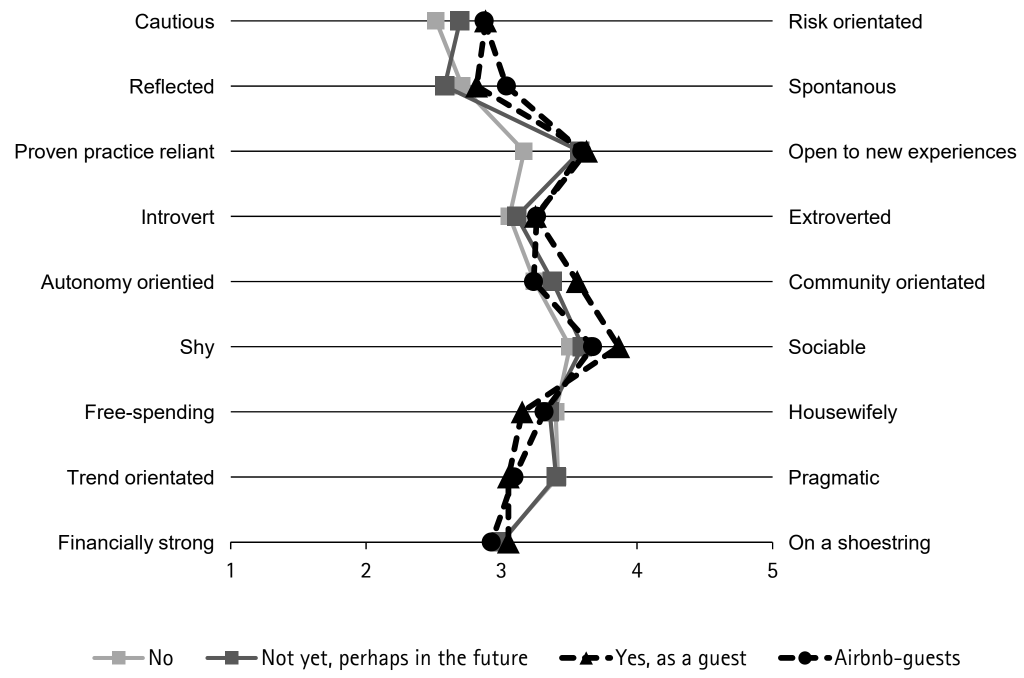

Figure 3: Personality profile of respondents by level of participation
(N = 271 in online survey and N = 61 Airbnb guests in Berlin)

Other than age there are no significant differences within the sample, for example between students and professionals. Also with regard to the use of sharing offers, there are only marginal differences in personality between users and non-users. One reason for this is likely to be that the sample was drawn from a sharing-prone population, which also means that these results cannot be translated easily to the German population. However, it should be noted that sharing economy participants are slightly more risk-tolerant and open to new things than their non-user counterparts. One comparatively strong feature that most sharing economy users have in common is their openness to new things and their sociable personality. This is also mirrored in the descriptions Airbnb hosts gave of their guests. The hosts describe their guests as open, sociable and communicative.

In contrast, financial motivations are less relevant than expected. Actual and potential users of sharing-economy accommodation are no more frugal or thrifty than non-users. At the least, their reason for participating in the tourism sector of the sharing economy is not that they are unable to afford anything else. Their internal driving force must be another kind of motivation.

Figure 4 depicts various potential motives for using private sharing-economy accommodation and how the respondents evaluated them. As expected, the economic dimension within the motivational structure is relevant, but it is not the only driving force. Similar results can also be found in Liedtke's study, which focuses solely on Couchsurfing: in this study, too, financial aspects were less important than other motives, such as meeting new people, cultural exchange and establishing new friendships (Liedtke, 2011: 34 et seq.). Visitors' expectations concerning specific experiences at the destination – such as having direct contact to the local population, gaining insider information from the host about bars, restaurants or the neighbourhood in general, and experiencing the destination from the locals' perspective – are at least as relevant as the monetary factor. These are the most important motives in the leisure segment in particular. More general aspects, such as "expanding one's horizon" or "trying new things" together with recommendations from friends are also relevant, but they are much less important than those dedicated to the on-site visitor experience.

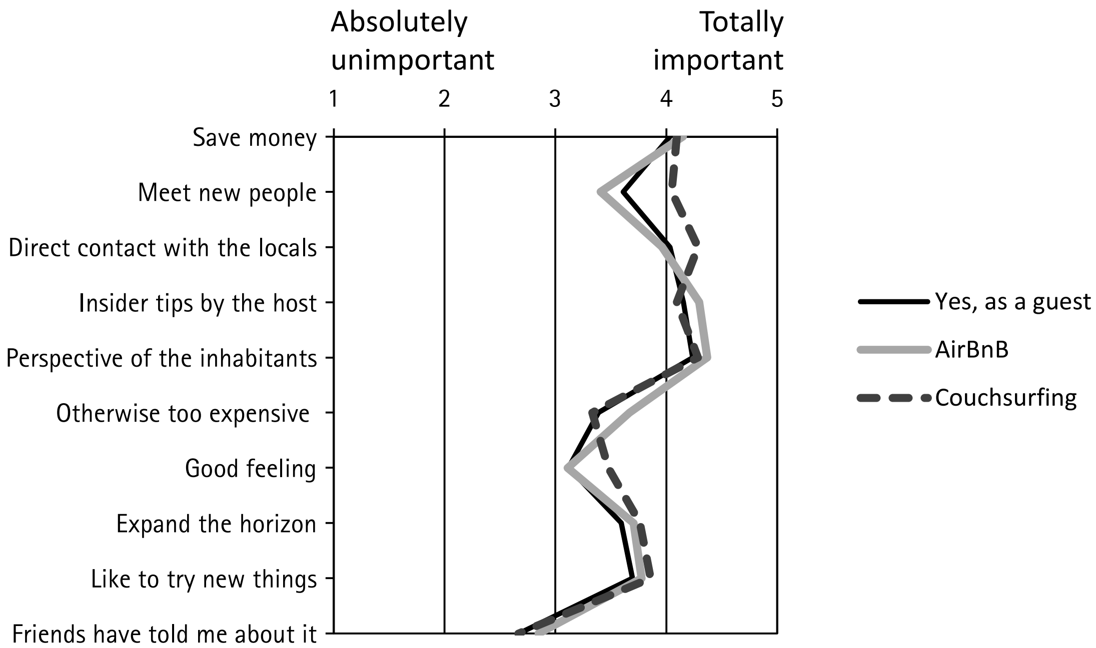

Figure 4: Motivations of sharing-economy accommodation users – differentiated by Airbnb and Couchsurfing users *(N = 112 in online survey)*

Comparing the three lines in Figure 4, it becomes obvious that no significant differences exist between Airbnb users and Couchsurfers. The only noticeable deviation can be found in the social contact items "meeting new people" and "direct contact with the local population". Couchsurfers seem to attach greater importance to these very specific social objectives, while differences decrease in the next item – gaining insider tips from the host.

In a nutshell, the online survey revealed two leading motivational dimensions that were supported by the quantitative questionnaires distributed to and the qualitative interviews conducted with Airbnb hosts: monetary aspects and the social interaction between the guest and the host.

5.1 Monetary dimension and the housing market

The role of financial motivation became a key aspect during the analysis of the quantitative offline questionnaires. This survey revealed that one-third of leisure guests and half of business tourists booked private accommodation via websites such as Airbnb to save money. Leisure visitors also stated that these sharing platforms enable them to visit destinations that they would otherwise be unable to afford.

The price aspect came up for discussion in the qualitative interviews as well. From the guest perspective and from a tourism point of view, the visiting of destinations that would otherwise be too expensive was often mentioned. Moreover, business travellers and people who intended to spend a longer period of time in Berlin (so-called "temporary migrants") appreciated the better value for money of Airbnb apartments. The apartments or rooms are often fully furnished and they offer amenities, particularly for extended stays, that most hotels cannot provide.

> "I got kind of frustrated by staying in hotels, they are really nice… but you are paying €150 a night and there is no kitchen, and internet is an extra €10 a day. And from the budget I have for work travel, I could rent the whole [Airbnb] place. I can get a two-bedroom place, with a kitchen and a balcony…. And there is also the appeal, instead of just staying somewhere you feel as if you are living somewhere for a couple of days" (Guest_Berlin_3).

The high relevance of the monetary dimension likewise applies for the host side, although their motivations seemed to be even more diverse. Reasons for offering the whole apartment on Airbnb or renting out a private room within a shared flat are wide-ranging, as the following examples show. Of course, there are professional suppliers renting out several rooms and apartments to make a business out of it. Skowronnek, Vogel and Parnow (2015) identified about 1,200 persons and thus about 10% of all hosts in Berlin that offer more than one room or apartment.

However, in many interviews, a distinct connection between the tight housing market and the private supply of accommodation was drawn, as the following statements illustrate:

> "It just worked out like that. I went back to Germany and I took over her shared apartment…. The flat is really large, four rooms, and I didn't think of anything else than just continuing it as a shared apartment. I can't use it only for myself, I don't have enough money. And in the case I leave, it'll be transformed into a luxury apartment…. Before Airbnb, I advertised the apartment as a student shared apartment at WG-Gesucht [www.wg-gesucht.de is a Germany-based internet platform where one can advertise and search for shared apartments]. But that is always such a hassle. You always have certain problems…. And now, I am with the holiday guests, which is fantastic. It works out even better than the shared apartment" (Host_Mitte_8).

> "We have a three-room apartment, my husband, the son of my husband, he is 12 years old, and me…. And now, we have a baby. That means we are lacking one room and we need one additional room. And we don't want to leave our house in which we are so rooted…. That's why we rented the other apartment. We plan to combine the two units so that our flat is simply enlarged in the end. It is a one-room apartment with a kitchenette and a bathroom and that is going to be our bedroom in about 2 years, when our little son needs his own room. And until then, we've planned to finance the room via Airbnb" (Host_Rummelsburg_2).

Due to the specific situation in Berlin after reunification and until the 2000s, living space, even in central areas, was comparatively cheap, and low-income to medium-income people could afford to rent quite spacious apartments in these areas. Due to major investments in the real estate market, particularly after the financial crisis in 2008-2009 and in the course of general re-urbanisation processes, real estate prices have risen by more than 65% since 2007 and rental rates increased by almost 50% (see Section 3.3). This context must be taken into account when interpreting the motivations of people who rent out their private homes to total strangers. We do not want to deny the certain existence of a considerable group of suppliers who own or rent apartments and sublet them to tourists for solely professional reasons. And of course it falls within the government's responsibility to ensure that this happens within the legal framework. However, even if an estimate of 30% of Airbnb hosts are professionals, there is a very large majority of 70% of hosts made up of small-scale businesses of people who rent out their rooms or apartments on an occasional basis to co-finance their living in Berlin, to pay for small luxuries, such as a cleaning person or a holiday trip, or even to just be able to keep the apartment they are living in.

5.2 Interaction between hosts and guests as an important element of the visitor experience

Besides the financial aspect, personal interaction between hosts and guests plays a major role for the majority of the tourists interviewed. In particular, visitors from the leisure segment consider it very important to get to know new people (a significant difference from business travellers) and to receive personal information and recommendations from the host (also a significant difference). This element is also reproduced in the contact intensity between hosts and guests. Based on 58 questionnaires completed, one in seven stated that contact was limited to formalities, e.g. receiving keys or brief information about the room/apartment. In some cases, a third party dealt with these formalities (Figure 5). In one in four cases, the host had also prepared written information for the guest. Almost half of the visitors said that the host provided personal information about the city; another 12% undertook activities with the host. In all of the latter cases, personal information and joint activities were supplemented by written information about the city.

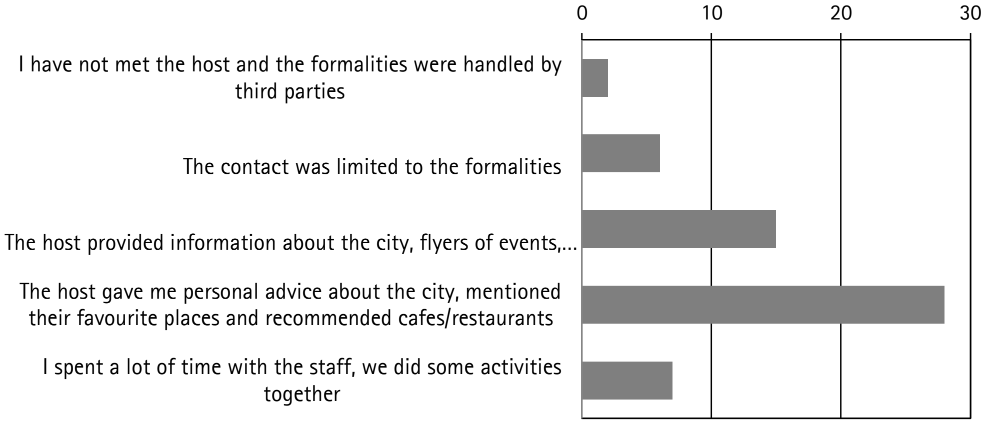

Figure 5: Interaction between hosts and guests *(N = 58; offline survey of Airbnb guests in Berlin)*

Qualitative interviews with the hosts confirmed that most had personal contact with their guests:

> "I hand over the key, I show them around, show them the bathroom, their room of course and I give them the Wi-Fi password. Mostly, I ask them why they are in the city. Sometimes, I leave the keys at a kiosk close by, when I am not at home. Sometimes, it happened that people arrived when I was not in the city at all. I just want them to find everything. But generally, I am always interested in the reasons why they are here, ask if everything is ok, and make some small talk" (Host_Moabit_18).

The intensity of contact between the host and the guest primarily depends on the type of rental. People who actually share an apartment and just rent out one of their rooms have more intense contacts with their guests than hosts who rent out one or more apartments.

One last important aspect to consider at this point is the type of information on the city that is transferred between hosts and guests. It has already been pointed out that many hosts provide written tourist information material for their guests, also in order to support their personal advice. But personal, "insider" tips (see also Figure 4), seemed to be of high relevance. Examples of this type of advice include nearby restaurants, cafés, and bars. This is done with the help of flyers or other information material for the guests, but also with the Airbnb website itself, where a map of the area can be supplemented by icons indicating a favoured café, club, grocery store and so forth.

This is also an important dimension focusing on the touristification process and the much more general questions of how tourist spaces emerge. In these cases, urban residents designate certain localities to be of interest for their guests. They bundle such places in their Airbnb neighbourhood maps and by doing so confer a certain, "touristy" meaning on that place. In doing so, neither the city's government nor the destination management organisation influence these processes directly. Instead, the residents themselves, who often claim to suffer from a tourist glut, actually co-produce such areas and promote them on their Airbnb websites. At this point, it appears promising to go into greater detail about the early and resident-led phase of tourist space production. This is particularly relevant when considering that many Airbnb localities in Berlin are also claimed to be creative quarters and immigrant neighbourhoods, such as large parts of Kreuzberg and Neukölln. It would be worth analysing how other residential groups confer meanings on the same place and see to what extent they form a symbiosis, or if they conflict.

In addition to the written information, hosts often give tips about certain spots in their neighbourhood when talking. In doing so, they likewise direct visitor flows towards certain sights and neighbourhoods.

> "I told him about things that I find are interesting. I told him about the war memorial in this area. That's always something that annoys me, when it comes to tourists. When they come to Berlin and only visit the East Side Gallery and think that you actually could have jumped down the wall. And they don't have any idea of what a divided city actually means. They want to experience the divided city and then they went visiting a gallery and not the wall. That's something I like to show people. And strangely enough, there are no tourists, there are the people themselves. That's not sufficiently promoted in the city. And it is something that I think is a bit different. I have the impression that thus they can also see other neighbourhoods" (Host_Moabit_18).

In contrast to the aforementioned motivational sphere of using Airbnb, the monetary aspect and the personal interaction, the last section deals with an aspect that was only identified in the course of the on-site personal interviews.

5.3 Individuality of the facilities and design of the accommodation

The qualitative interviews conducted with the hosts revealed an element that was underestimated in the previous quantitative surveys. Due to their relatively intense guest contact, Airbnb hosts were able to observe that visitors greatly appreciate the ambience of private accommodation. As a result, not only do direct contacts with the host and the creation of an inside perspective contribute to the specific visitor experience of Airbnb and the like, but the design and amenities of the accommodation are important too.

> "And those who participate in something like that [Airbnb], and say, I don't want to go to a hotel, don't head for a standardised 70s-style flat, but prefer the charm of an old Berlin building.... But I think – for a relatively low price – they want this 'That's Berlin!' feeling. A hostel, in contrast, is of course completely interchangeable; it always looks the same everywhere. I think that's the first thing they want" (author's translation) (Host_Berlin_15).

Finally, further aspects are also relevant when it comes to choosing private accommodation in the sharing economy. Some visitors stated that these online platforms are easy to use, offering a comparison of different accommodation and prices, and fast access to relevant information. For others, the straightforward and instant contact and communication with the host is the greatest advantage. In addition, both the quantitative surveys and the qualitative interviews revealed that the specific location of the rooms and apartments within a city or even a neighbourhood may be highly relevant to visitors, and may be the decisive factor for choosing private accommodation over a hotel.

At the same time, the guests showed a specific interest in accommodation options that are perceived as authentic and that provide an opportunity for personal contact with the locals. In return, this leads to the conclusion that even reducing the rates of commercial accommodation offers of hotels and hostels would not cause the disappearance of the Airbnb phenomenon. Airbnb is only the tip of the iceberg of a tendency in tourism demand where more and more experiences perceived as unstaged outside the traditional tourist bubble are sought out. In other words, gentrifying neighbourhoods are shaped by different actors of which urban tourists and Airbnb users are just two groups among others. Disturbances caused by noise, waste or the mere presence of large visitor flows cannot be attributed to the growth of Airbnb in Berlin. It is much more the atmosphere and scene in these areas that will continue to attract residents who behave like tourists, visitors from other neighbourhoods of the city, traditional tourists staying in hotels, etc., even if Airbnb were completely banned from Berlin.

6 Challenges of the Airbnb phenomenon for urban governance reactions

The Airbnb phenomenon as a new aspect of the (urban) tourism market has evoked sharp reaction from the public sector. In order to restrict the fast-growing holiday apartment rental market and to gain some degree of oversight of this grey market segment, Berlin's Senate enacted a new law. The law prohibiting the misappropriation of living space (*Zweckentfremdungsverbot-Gesetz*; Senatsverwaltung für Justiz und Verbraucherschutz Berlin, 2013) came into effect in May 2014. The regulation states that each supplier of holiday apartments and rooms has to report the business to the responsible district office for request of approval. Meanwhile, about 6,000 holiday apartments have been reported to the districts' offices, with the majority of them located in Berlin Mitte with 1,728 registrations. According to these figures, the share of professional hosts is about 30%, with "professional hosts" defined as people offering two apartments or more (Holm, 2016). At this point, one has to take into account that these figures also contain professional holiday apartment suppliers and even some hostels or hotels which used the Airbnb website as an additional distribution channel for their rooms and apartments. Within the discussion of Airbnb as a whole, it becomes particularly obvious that the hospitality industry in Germany lacks a clear distinction between private and professional holiday home and apartment rentals (the statistical threshold from which renting is regarded as professional is ten beds).

However, what has further aggravated the situation in Berlin and what finally triggered the enactment of the law prohibiting the misappropriation of living space was not just the hotel industry defending itself against a new competitor (IHA, 2015). It was rather the highly strained housing market as well as the greatly increased rental rates in recent years that drove Berlin's officials to take legal action against private rentals to tourists. What the government, at this point, has surely not taken into account is the multi-dimensional background of the privately renting Airbnb hosts for offering their rooms or apartments to strangers.

The 2014 law and its long-lasting consequences can be characterised as an ill-conceived reaction of the local government. To a certain extent, their defensive position is not unusual for managing innovative but unconventional business models, which are in this case fostered by the proliferation of the mobile internet and social media. Instead of trying to analyse the background of the development and the underlying driving forces that lead local residents to rent out their private space, banning private rentals seems to be rather short-sighted, trying to eliminate the symptoms without really touching on the causes of this new phenomenon. There is no doubt that financial regulations and measures in particular need to be adjusted to new business models introduced by the internet in general and by the sharing economy and its subsectors in particular. Mainly, semi-professionals and professional suppliers need to be identified and taxed correspondingly. Moreover, they have to fulfil the general regulations that apply to the professional hospitality industry. On the other hand, private rentals also have to adapt to the existing legal framework. This applies mainly for rules regarding the taxation of rental properties or small-scale economic activities (including local tourism taxes). However, such adjustments need a certain amount of time and are by no means exclusively connected to Airbnb or the sharing economy. On the contrary, they are typical for innovations that existing rules and laws cannot adequately address. Yet hindering these developments to preserve the status quo is surely not the most tolerant and liberal coping strategy that one could have expected from Berlin's government.

Suggesting that Airbnb is a major factor in the upward spiral of real estate and rental prices is, from our perspective, overestimating the platform's influence on the housing market. A very large majority of users do not rent units to simply sublet them to visitors. Many hosts have idle space available and sublet it to simply maintain their current standards of living in times of rising rental rates. However, these figures do not sufficiently take into account the large majority of Airbnb hosts who rent out their whole apartments only from time to time, for example when they are on holiday themselves. As GEWOS (2014) has illustrated, 88% of the apartments were only let 120 days a year or less.

In order to understand the full scope of Airbnb's impact on Berlin's housing market and on the related gentrification discourse, it is indispensably necessary to further differentiate between different types of hosts and hosting on Airbnb. At least two different groups need to be addressed in this context: first, those professional hosts who have bought or rented one or several apartments in order to transform them into holiday homes and make a business out of it. In these cases, the flats were actually withdrawn from the classic housing market and they were let on Airbnb for short-term use for prices far higher than regular tenancy agreements. However, the share of such professional hosts is comparably small. If the frequency or the volume of renting accommodation serves as an indicator of professionalization, it is noteworthy that only 12% of listings are rented out more than 120 days a year (GEWOS, 2014). And those who offer more than one unit cover 10% of the hosts (Skowronnek, Vogel and Parnow, 2015). In order to gain a full understanding of this host group, it would be necessary to analyse it in greater detail. It is also obvious that hotel chains and hostels use the Airbnb platform as a distribution channel as well (Köller, 2016) and in these cases, of course, one host has several listings.

Airbnb (2016) themselves published figures saying that between 1 January 2015 and 1 January 2016 a typical listing in Berlin was booked on average for 34 days, indicating that the vast majority of the hosts rented properties out only occasionally. This second group of Airbnb hosts consists of people renting out their whole apartment for less than 120 days a year. In other words, with such an occupancy rate they could not survive as professional hosts and the obvious assumption must be that these people actually inhabit their apartments and just rent them out when they are away.

A comparison between all available Airbnb beds and the amount of actual overnight stays indicates that most Airbnb hosts do not do so as professionals. This is an important point, since it is particularly the professionalisation of this business that is regarded as illegal in terms of lacking taxation regulations and the conversion from housing into business properties. This aspect of sharing flats is one of the main reasons for its decreasing social acceptance, since it supposedly leads to a reduction of affordable living space, particularly in highly desired, central areas of the city.

Concerning the gentrification process, it must be stated that sharing accommodation – especially via the Airbnb platform – cannot be regarded as the origin of the gentrification process. The existence of pioneers and gentrifiers in a neighbourhood who offer accommodation in their flats is as much a precondition of gentrification as the development of shops and gastronomy services focusing on a gentrified target group. New urban tourists staying in shared accommodation and frequenting the shops and restaurants in gentrifying/gentrified neighbourhoods can at the same time be seen as intensifiers of the gentrification process. But as the figures have shown in the case of Berlin – one of the metropolises with a very visible Airbnb presence – the sharing economy is far from being the most important driving force of the gentrification process and only to a limited extent contributes to its development, even though it is often seen in public discussions as the prime factor.

At the same time, sharing accommodation is not a totally new phenomenon, but has been facilitated by internet platforms like Airbnb such that it has become much more common than in former times. As a result, regulation schemes still have to adapt to this new form of market supply. Questions of taxation, local tourism fees and security certainly have to be discussed, these systems have to be adapted to this new type of accommodation supply alongside traditional providers, while also distinguishing between professional and non-professional providers. At the same time, existing legal instruments concerning the opening hours of restaurants and bars in specific neighbourhoods must also be consistently applied to reduce the negative impacts on inhabitants – always bearing in mind that a totally undisturbed environment cannot be achieved in central urban quarters.

As the empirical findings illustrate, new ways of experiencing urban tourism are on the advance, fostered by the accommodation opportunities initiated by Airbnb and similar platforms. They do not seem to represent a mere temporary fashion or hype, but instead are the manifestation of a fundamental tendency in urban tourism. As it is often the case with innovations, the established ways of governing have difficulties adapting to new phenomena, such as the sharing economy. Using the example of Berlin, it is clear that the way the public sector has handled the challenge is barely adequate. A much more comprehensive and less hasty approach appears to be necessary.

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