

POST-COVID19 FEATURES OF SHORT-TERM RENTAL APPLICATIONS. FLEXIBILITY AS A CENTRAL ASPECT OF AIRBNB IN BARCELONA

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ABSTRACT

The Airbnb phenomenon in Barcelona has come to occupy a central role in the local public debate. This has all been substantially altered by the global spread of COVID-19. This scenario has promoted a reformulation of the tourist rental scene, of both regular rentals and those that were also involved in the local tourism scene on an informal and/or irregular basis. In this article, we use this context as a starting point in order to analyse how this adaptation of the tourist rental sector has taken place in Barcelona, in relation to a flexible interpretation of the legislation on urban leases. In order to do that, the methodology uses is basically qualitative, although with the support of a survey in a way of triangulation system of research.

Keywords: Airbnb; Barcelona; short-term rentals; flexibility.

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Características post-COVID19 de las aplicaciones de alquiler de corta duración. la flexibilidad como aspecto central de Airbnb en Barcelona

RESUMEN

El fenómeno Airbnb en Barcelona ha pasado a ocupar un papel central en el debate público local. Todo esto ha sido sustancialmente alterado por la propagación global de COVID-19.

Este escenario ha promovido una reformulación del escenario del alquiler turístico, tanto de los alquileres regulares como de aquellos que también se involucraban en el escenario turístico local de manera informal y/o irregular. En este artículo, tomamos este contexto como punto de partida para analizar cómo se ha producido esta adaptación del sector del alquiler turístico en Barcelona, en relación con una interpretación flexible de la legislación sobre arrendamientos urbanos. Para ello, la metodología utilizada es básicamente cualitativa, aunque con el apoyo de una encuesta a modo de sistema de triangulación de la investigación.

Palabras clave: Airbnb; Barcelona; alquileres a corto plazo; flexibilidad.

1. INTRODUCTION

When the Spanish government declared a State of Emergency for the entire country on 14 March 2020, with the aim of stopping the spread and improving the control of COVID-19, an enormous number of processes, relationships, connections and dynamics came to a grinding halt. Even though society as a whole had been watching what was happening in countries like Italy, where entire areas were beginning to observe control measures, or even the locking down of cities such as Wuhan, the impact that quarantine and the stoppage of the main production sectors would take several more weeks to reveal the magnitude of the situation.

For the tourism sector, the cancellation on 12th February 2020 of the *Mobile World Congress* (MWC) in Barcelona, following the withdrawal of multinationals of the likes of LG, HMD, Sony, Ericsson among others – with the argument that they were protecting the safety of their employees and attendees – had already provided several signs and clues as to what was going to happen within a short space of time¹. From that point on, bookings for hotels, flights, cruises, celebrations and a whole host of events were cancelled one after the other. Most companies offered the option, in principle, to either exchange the cost of the booking for a voucher to be used at a later date or to have the money refunded. Others simply had no idea how to react².

¹ The celebration of the *Mobile World Congress* represents, according to calculations, almost a 0,2% of the Spanish GDP and an economic impact of more than 492 million of euros for the catalan capital (Jareño, 2020)

² According to a news article published by the Aragonese daily paper *Heraldo de Aragón*, one year later, over 90% of the customers who requested this type of solution have received a response. “Vacaciones canceladas en 2020: Un año después es hora de que me den una solución” (“Holidays cancelled in 2020: one year on, it’s time they offered me a solution”), *Heraldo* (13/03/2021). Available at <https://www.heraldo.es/noticias/economia/2021/03/16/vacaciones-canceladas-2020-covid-ano-despues-es-hora-solucion-1477927.html?autoref=true>

The main players associated with what is known as *platform capitalism* (Srnicsek, 2018), such as Airbnb, inevitably found themselves significantly affected. As one of the company's founders, Brian Chesky, commented to the BBC, "It took us 12 years to build the company, and we lost almost everything in a matter of weeks" (BBC, 2020). COVID-19 caused the San Francisco company to have to make huge cutbacks, making 1900 people redundant, or 25% of their direct employees. They also had to very significantly reduce investment in sales and marketing activities, including the *call centre* that had just opened in Barcelona³. However, even in the face of such negative forecasts, in late April 2020 the company received an injection of over 1 billion dollars from *Silver Lake* and *Sixth Street Partners* investment funds, which could demonstrate the confidence of certain economic and financial sectors in the platform's future.

As it would not take long to become clear, the tourism crisis caused by the pandemic demonstrated Airbnb's ability to present itself as not just an intermediary within short-term rental, but as a complete and flexible instrument in the management of property assets within the broad and diverse tourist rental market. The contingencies employed due to COVID-19 brought to light one of the main features that determine how it operates, which we might call its *collaborative modus*: flexibility. The drastic reduction in tourist demand in cities such as Barcelona therefore revealed, in addition to a contraction, a reconfiguration of the tourist rental supply. It brought to the fore a very specific segment of the demand: long-term non-residential rental, that is, the type that – although used by those who have travelled to a different destination to their normal environment – has a duration of several weeks or months, well above the average tourist stay⁴, and is associated with reasons that are not purely holiday-related but rather linked to, i.e., training-related purposes. The *COVID-19 effect* in this particular market has been confirmed by Airbnb itself⁵, which attributes over half of long-term stays marketed on its platform in the period between August and November 2020 to reasons related to the health crisis.

2. SHORT RENTALS ON HOUSING MARKETS AND TOURISM DURING THE PANDEMIC

Recent years have seen growing publications about short-rentals on housing markets (Clancy, 2020; Cocola-Gant and Gago, 2019; Waschsmuth and Weisler, 2018; Yrigoy, 2019). In general, these researches point out the apparent relationship between the proliferation of platforms like Airbnb or Vrbo, former Homeaway, and an increase in the rentals. For example, in the most comprehensive study spanning the entirety of the US, Barron et al (2021) found that an increase in the number of Airbnb listing by 1% means a 0,018%

3 "Airbnb rompe con la empresa que gestiona su 'call center' en Barcelona con mil trabajadores" ("Airbnb parts ways with the company managing its 'call centre' in Barcelona, with a thousand employees"). *La Vanguardia* (02/05/2020). Available at <https://www.lavanguardia.com/economia/20200502/48904394843/airbnb-cierra-call-center-barcelona-cpm.html>

4 In the case of Barcelona, in 2019 this figure was between 2.1 nights for visitors staying in hotels and 3.4 for those who rented a tourist apartment (Observatori del Turisme a Barcelona, 2020).

5 "New Insights Into How Guests Are Using Airbnb for Longer-Term Stays". *News Airbnb* (06/11/2020) Available at <https://news.airbnb.com/new-insights-into-how-guests-are-using-airbnb-for-longer-term-stays/>

increase in a long-term rent in the same area. Even when these platforms were born linked to the new, and sometimes welcome for that, *shared economy*, they soon shown, to a significant degree, that they were to be used to permanently rent out entire apartments to tourist (Kadi et al, 2019; Crommelin et al, 2018; Waschsmuth and Weisler, 2018) as another and classic capitalist activity. Nevertheless, the COVID19 pandemic has modified the direction and speed of this dynamic insomuch as, in the context of the restrictions due to the effects of the virus, the supply and demand for tourism accommodations dropped drastically.

This opened new possibilities of researching with the aim of understanding what had happened in relation to the short-term rentals in many cities during the collapse of tourism market. Although it still is soon to count with a wide number of papers about this issue, it is already possible to find some interesting published investigations. Thus, recent researches like the one carried out by Shen and Wilkoff (2020) in relation with the changing determinants of tourist's repurchase intentions. These north American professors have hypothesized that future guests of tourist apartments would make their choices of where they are staying based on perceived cleanliness during the pandemic. Thereby, after the pandemic situation customers will choose those facilities that offer a much wider sensation of hygiene and risk free in relation with the COVID19. In the same way, Braje et al (2022) point out that topics like perceive values, authenticity and perceived risk will be determinants of consumer's repurchase intentions after COVID19.

Closer to the object of the present article, in relation to the supposedly return to the regular long-term rental market, Kadi, Schneider and Seidl (2020) show us, in the case of four cities in Austria, that even when a "number of property owners have reconsidered their decision to use their units for touristic purposes and converted them back to the regular rental market [...] this has not led to a decrease in rent levels" (2020: 55). They explain this fact considering, among other things, that the housing demand is so high in these cities that landlords can keep the prices also high with no losses. This is on line with the results published by Llanesa and Raya (2021) for the case of Barcelona. They point out that the supply adaptation strategy to accommodate the decreasing demand, especially by professionalized hosts, was to attract a more stable demand coupled with lower prices and longer stays.

Guglielminetti, Loberto and Mistretta (2021), on the other hand, in a note published in February 2021 and including listing of 19 major European cities located in 15 different countries, analyse the impact of COVID19 on supply, demand and prices of short-term rentals. They report that the pandemic had a strong negative impact on market activity, on all dimensions. The demand was drastically reduced and the supply of tourist apartments decreased leading to a "worsening of the average quality of the apartments on the market" (2021: 4) according to the diminishing prices.

3. HYPOTHESIS AND METHODOLOGY

Albeit the media (Aranda and Catà, 2020) was quick to speculate that COVID19 would thus ease the housing shortage and relieve stress from housing markets, i.e., former short-term rentals, which can no longer be rented out on the collapsed tourism market, would

be returned to the regular rental market, increasing constrained supply, this finally did not happen. This article seeks to show that Airbnb is more than a simply operator within the tourism sector. Most specifically, it explores how its flexible collaborative modus has allowed to the platform to continue working in the rental sector but changing from a short-term holidays type to a middle-long term one and, at the same time, to become some kind of gatekeeper of the mobilities of the cities. We will demonstrate this by focusing on the city of Barcelona and on the use of Airbnb by a group of postgraduate university students as an example of not holiday-related specific group. We have chosen Barcelona for two main factors. First of all, because, for the last decades, Barcelona has become a laboratory for urban practices later applied to another metropolis in the world, mainly in Latin America but also in Europe (Delgado, 2004 and 2005; Mansilla, 2016). Furthermore, Barcelona has been dealing with the tourism apartment's impact in the long-term market for years and the actual City Council is one of the governments in Europa which has tried to control and regulate platforms' activities more decidedly (Mansilla and Milano, 2018; Cocola-Gant, Gago and Jover, 2020; Cocola-Gant, Hof, Smigiel and Yrigoy, 2021). And secondly, because the researchers team work as professors and academics in university institutions of the city.

A predominantly qualitative methodology has been used (Corbetta, 2003; Hammersley and Atkinson, 2007). However, this methodology was, to a lesser degree, complemented by a further quantitative type with the aim of using methodological triangulation (Creswell 2003) in an attempt to corroborate the initially presented proposal to the greatest possible extent. Thus, the first step when it came to performing this process was an in-depth document review of articles, reports, reviews, books and documentation focused on the urban economy, the development of platform capitalism and legal references related to the rental and housing sector in Catalonia, the State as a whole and at European Community level. Later, a series of in-depth interviews (15) were conducted with different parties, including different kind of *hosts*⁶, an institutional representative and other entities either directly or indirectly related to the phenomenon of tourism rental, such as companies active in the sector and resident associations or organisations. In addition, a survey was conducted among a specific segment of the demand, such as that represented by students from postgraduate programmes in Barcelona and, finally, a series of specific semi-structured

6 All the hosts have been located using Inside Airbnb's data base and contacted through the Airbnb website. In order to send messages to the hosts is necessary to create a fictitious reservation. If Airbnb notes you are just trying to contact to the hosts, the platform bans you. This happened 3 times during our research. We contacted 39 hosts, we got 18 answers and, finally, we interviewed 6 of them. All of the were "home-sharing" type, except one that usually rent his apartment when he is not at home in holidays. It was impossible to get an interview from a host that rents his/her entire apartment. Due to that, we decided to contact to companies dedicated to the intermediation. We send 19 mails and we got 7 replies. We could realise that, in the interviews, some of them just preferred to finish the interview when they realised what was about it. So, we just could made 2 complete interviews. To get more information and seeing the difficulties that our research was facing, we decided to contact to different organisations: APARTUR, organization of tourist apartments in Barcelona; ACABA, organization created to defend those who got a fine from the City Council because they activities renting apartments without a license; *Veïns i Anfitrions*, organization that try to show that neighbours and hosts can be the same and, finally, an neighbours organization that fight against the effects of Airbnb apartments in Barcelona. 6 interviews in total. The rest of the interviews were realised to 1 civil servant of the City Council of Barcelona related to the tourism sector.

interviews (5) was held with those same students. This quantitative analysis concentrated on systematising and descriptively analysing the platform's use and the type of housing solutions that the students interviewed seek from it. The study involved 600 students from different postgraduate programmes offered by the Escuela Universitaria de Turismo Ostelea, a centre affiliated with the Universitat de Lleida (UdL), from the 2019–20 and 2020–21 intake, as well as students from the Urban Tourism Masters at the Facultat de Geografia i Historia of the Universitat de Barcelona (UB) from the 2020–21 intake. The information collected will appear referenced as proves useful for the argument put forward⁷.

4. THE CONTEMPORARY CITY AS A SPHERE OF FLEXIBILITY: LEGAL RECONFIGURATION PROCESSES

At this stage, it is virtually redundant to say that cities play a fundamental role in capital accumulation dynamics; a phenomenon that, although it was happening in a particularly significant way under the Fordist system, acquired predominance with the neoliberal reforms undertaken in the 1970s by different governments across the globe (Harvey, 1989a, 2001 and 2012; Smith, 1996). The *neoliberal city* is a major city distanced from the rigid parameters that demanded the social and productive organisation model typical of the period immediately following the second world war. As anthropologist Isaac Marrero states about the Barcelona case, the Catalan capital has been characterised by “moving from an industrial, Fordist production model to a flexible, post-Fordist model [as well as by] the consolidation of a global system of connection and interdependence” (2003). On a global level, these production changes have been accompanied by significant transformations within the ideological superstructure of cities (Harvey, 1982b), from which arise new hypotheses based on neoliberal production system (entrepreneurship, individualism, consumption, etc.) and which go on to celebrate informality, flexibility and freedom as founding values, as ethical premises that define new social and production systems⁸.

Simultaneously, and accompanying these processes of economic, social and cultural transformation of cities as spaces for consumption, legal changes have also been developed at all levels, with the aim of facilitating the complete consolidation of this model. With regards tourism, the expansion of Airbnb and other similar platforms focused on accommodation has played a key role in the political agenda of recent years in Barcelona, as well as in other urban destinations. Despite the different stances taken with regards the effects of this platform, there is consensus in terms of the relevance of the subject and the

7 Due to the limitations of time and resources, we decided to make the survey among 2 groups of students. The election was mainly pragmatic but, at the same time, we thought it could be, although not so wide as we desired, very representative of the this kind of phenomenon. Specifically, the selection was made on base of 3 main reasons: 1.- Because the 90% of the students of these 2 training programs are from abroad, 2.- All the members of the research team are professors and researchers in both institutions, so the control over the survey -using a google application- was much easier, and 3.- Both programs were related to tourism so we thought the answers could be more complex. It is possible to consult the questions of the survey in the Annex 2.-

8 In the case of the city of Barcelona, this was demonstrated with the transformation or tertiarisation of its economy following the Olympic Games held there in 1992, in which geographer Rosa Telló called the shift from an “industrial city to a setting for consumption” (1993).

need to regulate this business type, with its global scope (Colomb, Aguilera and Artioli, 2019; Nieuwland and van Melik, 2020). In line with this argument, although there are differences on how to achieve it, it is possible to establish various legal formulas that have been adopted in different countries and cities, such as Paris, Amsterdam or Berlin (Quagliari and Sánchez, 2019).

At European level, two essentially opposed positions are observed. On the one hand, the European Commission (EC) which, in its report *A European agenda for the collaborative economy* (2016), recommends proactively supporting the expansion of these businesses, removing requirements for market access and defining their protection under the legal framework for information society service providers, something that translates into setting limits for States so that they have access to requirements and conditions for these companies in the community arena. The reasoning put forward centres around the opportunities it offers for consumers and entrepreneurs, the economy's growth and modernisation and defence of competition (Fernández, 2018; EC, 2016). In line with this position, some Member State authorities have developed similar reports. By way of example, in the Spanish case, the National Commission on Markets and Competition (CNMC) published the study *Economía colaborativa y nuevos modelos de prestación de servicios por internet* (Collaborative economy and new models of digital service provision) (2017) and the Interdepartmental Commission on the Collaborative Economy of the Institutional Government of Catalonia (Generalitat de Catalunya) produced its *Informe sobre la economía colaborativa en Cataluña* (Report on the collaborative economy in Catalonia) (2017). Among the latter's recommendations is the suggestion to identify, review and amend the sector's regulations, particularly those governing tourism accommodation and mobility.

On the other hand, there is a position that defends a restrictive focus regarding the regulation of these companies and which, in the case of tourism accommodation, has been backed and implemented by primarily local authorities. The emblematic examples of Berlin, Paris, Amsterdam, New York or Barcelona are all illustrations of this stance (Cox and Haar, 2020; Yeon, *et. al.*, 2020; Uzunca and Borlenghi, 2019; Crommelin, *et. al.*, 2018). In broad terms, several European municipal governments have included the regulation of tourist rentals on their agenda, and have opted to establish strict legal requirements (Cox and Haar, 2020; Guttentag, 2017). To do this, they have considered issues such as housing type (primary or secondary residence), the object of the rental (entire home or rooms), the duration (minimum and/or maximum limits), as well as prior formalities (authorisation and/or registration). The main arguments put forward to substantiate this position have been the need to counteract the negative externalities of tourist rental through platforms with regards the reduction in residential rental supply, the exponential rise in prices and the deteriorating liveability of certain neighbourhoods, as well as the defence of the social function of housing.

These processes of reconfiguring regulatory frameworks reflect tensions between the main actors involved and, in turn, between governments on different scales. They also reflect a link between the essential role of regulation and legal compliance and the expansion of these platforms. European institutions, as well as certain national and autonomous authorities, have expressed their desire to achieve legal standardisation, to reorganise the market to include these companies and to guarantee them a cross-border regulatory

framework free of obstacles to their expansion. Thus, despite the fact that COVID-19 halted tourism in Barcelona and indeed all destinations, new regulatory changes have still been made. One example of such changes is Decree 75/2020 of 4 August on Tourism in Catalonia, which will analyse below. Some local governments, meanwhile, have acted in the opposite direction (CEO, 2018), including Barcelona City Council itself, which – using legal tools in accordance with its competencies – has attempted to influence the rules of the game developed for players such as Airbnb. And although not everyone is moving in the same direction, it is essential not to lose sight of the fact that legal rules do not exist in a vacuum, that is, they require a subtext (Perry-Kessaris, 2013) to justify them. Predominant values and ideas will therefore be crucial for understanding their content, extent of compliance and globalisation.

5. TOWARDS THE ABOLITION OF FEES AND BARRIERS: DECREE 75/2020

August 2020 was the moment chosen by the Generalitat of Catalonia to publish its most recent regulation in its attempts to systematise and update tourism legislation: Decree 75/2020 of 4 August, on Tourism in Catalonia. This set of regulations introduces several new points, including most notably the simplification of start-up processes, *ex-post* control and three new accommodation categories: motorhome reception areas, unique accommodation and shared homes. In accordance with the preamble to this regulation, its reference framework is in Directive 2006/12/EC from the European Parliament (EP) and the Council, dated 12 December 2006, relating to services in the internal market and laws that incorporate the Spanish context, translated into the removal of fees, entry barriers and tourism authorisations for new initiatives. Similarly, it incorporates a line of argument in which reasons are expressed, such as the need to promote entrepreneurship and competitiveness, the proposition of responses to a social and economic demand and the unavoidable joining up of the Catalan regulatory framework with that of other surrounding countries.

Among the contents of this Decree, the incorporation of so-called *shared homes* as one of the categories of tourist accommodation has particular relevance for this article. Prior to this regulation, a significant proportion of room rental adverts on Airbnb were of dubious legality and, in fact, many were subject to penalties from Barcelona City Council. With the entry into force of this regulation,⁹ this type of practice is given legal protection. Specifically, the three sections of article 241 define the scope of application, establish to whom proprietorship falls and determine the minimum requirements for starting up this type of activity. It therefore declares that the shared home is a type of tourist accommodation provided in the proprietor's main dwelling in which they reside – in a moment, we will see who can be defined as the “proprietor” – for a stay lasting less than 31 days, in exchange for financial compensation. It then states that the proprietor may be the actual homeowner, or the person authorised by the homeowner, who is registered at and actually resides in the home. This matter, although it is nothing new in terms of the traditionally recognised powers granted to homeowner and tenants, does however distance itself from some arguments made by tenants

⁹ This Decree came into effect 30 days after it was published in the *Diari Oficial de la Generalitat de Catalunya* (Official Gazette of the Generalitat de Catalunya). However, Title IV of the Second Book – which refers to shared homes – will come into effect within a year of publication of this regulation.

on the subject, in which they demand the removal of the requirement for the homeowner to authorise the subletting of the property. On this subject, one of the interviewees, a spokesperson for the *Veïns i Anfitrions* association which brings together residents who use their normal residence for tourism rental activity in Catalonia, complains that the measure may represent a significant restriction for a group that, in his words, is thought to include 70% tenants. The spokesperson therefore signals an unfavourable climate for this type of practice, particularly in Barcelona's case, which would have a negative influence on the decision of owners to allow their tenants to sublet a part of their residence to tourists.

This activity has been penalised so heavily, has such a poor reputation and has been so vehemently attacked [...] that it is very difficult for an owner to easily make a responsible declaration so that their tenant can rent out a room to tourists... it is virtually impossible.

At the end of article 241, a series of requirements are listed to which shared homes must adhere. Among these are: the home must be in conditions of immediate availability and sufficiently equipped and in a perfect state of cleanliness; a double restriction is imposed on the maximum number of spaces: on the one hand, they may not exceed those indicated in the liveability document and, on the other, under no circumstances may there be more than four; it is established that private use of the room must be guaranteed – the room must have a door and use of living rooms as a bedroom is prohibited – and, finally, it is stipulated that the Número de Inscripción en el Registro de Turismo de Cataluña (NIRTC, or Registration Number in the Tourism Register of Catalonia) – or, if the owner does not yet possess an NIRTC, the provisional number –, in addition to the maximum number of spaces, must be displayed in a place that is visible for the accommodation users. The NIRTC must also be included in any advertising produced. Another new feature is the simplification of the administrative intervention schedule previously provided for. This means that the Generalitat's intervention is removed from the activity start-up procedures, leaving inspection of compliance with tourism requirements to a later stage.

Lastly, it is essential to point out the legal and responsibility rules that are established for intermediaries of tourism companies offering accommodation. These can be summarised in two main groups, regarding information and verification. Likewise, those intermediaries located outside the European Union (EU) must have a business email address for notification purposes. They must also confirm that the advertiser is in possession of the NIRTC or the provisional number and, if not, they must refrain from inserting the advert so that the advertisers are prohibited from marketing tourist activities or services that do not comply with legal requirements. In terms of their relations with the tourism authority, they are obliged to declare all data requested as part of the inspection procedures but are, however, exempt from the obligation to declare to the tourism authorities that they are exercising their activity and from being registered in the Tourism Register of Catalonia. This therefore responds to a subject that was generating doubts, while defining the framework within which these parties can act and laying out their responsibilities.

6. THE EVOLUTION OF THE AIRBNB MARKET IN BARCELONA

Once we establish the social, economic and legal context in which companies such as Airbnb are operating in the city of Barcelona, we can state that, with specific char-

acteristics, hosts have employed various tactics for dealing with the adverse tourism circumstances created by the COVID-19 crisis. Firstly, and as mentioned above, it is important to indicate a general contraction of the available accommodation supply in Barcelona being promoted through Airbnb. As indicated on the digital *activist* portal www.insiderairbnb.com, comparing the data from February 2021 with those from the last extraction prior to the COVID-19 emergency beginning, in January 2020, a reduction can be observed in the overall supply of accommodation in the city, from 20,708 adverts in 2020 to 18,471 adverts in 2021, equivalent to a decline of as much as 11%. In order to correctly evaluate this data, we must first consider the extraordinary *fluidity* of the supply marketed through Airbnb. In fact, the platform is offered as a flexible tool providing users with an extremely easy way of creating one or more accounts, or of de-registering and then re-registering later, as well as activating and deactivating adverts linked to their account(s). Changes to the supply are therefore the result of a continuous *turnover* between hosts leaving and adverts disappearing, as well as new users and new adverts being activated. Furthermore, the mere presence of an advert on the platform does not necessarily imply that the accommodation in question is available. Depending on the type and intensity of the tourist rental associated with the dwelling, we might find rooms or flats entirely dedicated to short-stay rental or others that, in contrast, appear on this particular market sporadically. In the latter cases, the availability calendar may remain empty for much of the time, except for when it is updated close to the dates for which the dwelling is fully or partially open to guests. In other cases, the adverts accidentally left on the platform despite the host no longer even residing at the address. Finally, for one reason or another, there are always a significant number of adverts that do not show any available date for the following 365 days. Therefore, if we compare the two databases, the number and weight within the overall supply of adverts with zero availability over a year has significantly increased. Indeed, in one year, these adverts have gone from representing 14% to 22%, which would suggest that the actual contraction of the supply could be rather higher than the 11% indicated above.

The interviews conducted with hosts or other operators confirm that a portion of the supply has effectively decided to distance itself from the *Airbnb market*, at least temporarily. For some hosts who were offering so-called *home-sharing* on an ad-hoc basis, the drastic reduction in bookings and the higher likelihood of last-minute cancellations— as an effect of Airbnb’s contested decision to impose an extension of the terms and conditions for free cancellations in favour of guests – has led them to stop subletting this part of the dwelling for a certain period of time. This is the case for one of the hosts interviewed who, in response to a question about the effects of the flexibility policy imposed by Airbnb during the pandemic, said:

I don’t expect to have any bookings and, if I do, at the moment they are ipso facto (sic), from one day to the next – I receive a message, but I can’t help them due to lack of availability. And I’ve also lowered the price as much as I can because I prefer for us to be on our own than drop it any further, because it wasn’t very profitable. My prediction for the future, I don’t know when the situation will change but, since it’s not my only source of income, it isn’t so bad.

Another host interviewed, who did depend more on the income generated by Airbnb to cover her day-to-day expenses, goes further than this. She calls the measures taken by Airbnb “quite unfair”.

This has complicated things, of course, because it’s a situation that affects everyone and so we are all losers. The fact that they’ve been so strict with things and that they’ve left us high and dry, when many of us, at least those of us who were doing this type of rental [because] we need it to live – it wasn’t an extra flat I had that I decided to rent out so that I could buy myself more things or go on holiday, it was to pay for household expenses, like rent – yes, it means they didn’t leave us any other option. [...] I know it all happened out of the blue and that they did what they could, but to return everything, let’s say, everyone has lost out from this and the loss should be equal.

For this type of host, the solution involved redirecting their offer to the residential market, in search of flatmates or, in the case of entire flats, new tenants. In the words of the previous host:

Yes, now [...] I’ve just left one of the small rooms on Airbnb, we share the large one with a couple, which helps me to pay the rent and I use the small room [the one on Airbnb] to pay my taxes. The value of what I can rent it out for has dropped so much, this rent only allows me to cover taxes, electricity, gas, water and my own rent.

In addition to a reduction in active and available adverts, the recent developments in accommodation supply suggest other types of change at play. The field work confirmed that a portion of hosts have decided to remain within the Airbnb supply in order to target a different *audience* compared with conventional tourism. Specifically, some hosts have opted for a guest profile associated with considerably longer city stays, from a few weeks to several months, for primarily professional or training purposes. This guest profile includes young professionals on placements, and students on Erasmus schemes or postgraduate programmes. In this group we can also include so-called *digital nomads*, i.e., predominantly young professionals with no family ties who, thanks to the development and spread of ICT on the one hand and increasingly flexible working models – particularly in certain creative industries – on the other, can carry out their work independent of their geographic location, allowing them to travel as they work (Müller, 2016; Reichenberger, 2017; Hall *et al.*, 2018). In fact, in June 2021, the daily newspaper *El País* published an article entitled *Proteger a los vecinos, revitalizar la España vacía... Las apuestas de Airbnb para viajar de manera sostenible* (Protecting residents, revitalising empty Spain... Using Airbnb to travel sustainably) (Gandía, 2011). This article appeared to confirm this fact when it stated that:

In Spain, 30% of bookings for 2021 so far are for long stays of at least 28 nights. Worldwide, this type of booking has increased from 14% in 2019 to 24% in the first quarter of this year, and the volume of reviews mentioning the phrase “remote working” has increased by 520%.

These are *temporary* populations who, even *pre-COVID-19*, had been increasingly present within the social landscape of cities such as Barcelona, and had attracted tangible interest from the market, as shown by the city's proliferation of *coworking* spaces or housing offers marketed under the *coliving*¹⁰ label. However, due to the dramatic reduction in tourist arrivals as the result of the health crisis and associated restrictions, this particular segment has come to occupy an unexpectedly central position for operators in the tourism market. It is therefore worth highlighting the recent campaign from *Consorti Turisme de Barcelona* “*Move your desk, change your life*” which aims to attract international professionals interested in remote working for several months in the Catalan capital¹¹. This initiative follows the same lines as tourism strategies employed by various destinations around the world, throughout 2020 and 2021¹². We should add that it is supported and promoted by the legislative changes mentioned above. That is, the ambiguity of the *Ley de Arrendamientos Urbanos* (LAU, or Law on Urban Rentals) in terms of establishing the rental duration periods – which can be less than a year when a specific period has not been stipulated or when it is undetermined – as well as Decree 75/2020 of 4 August on Tourism in Catalonia, which regulates *shared homes* and which allows up to 31 days of tourist accommodation in the Comunidad, fit perfectly with the flexibility necessary for a platform like Airbnb to work.

It is therefore not surprising that, for a portion of the in-home tourism rental supply, this segment of guests has represented a valid alternative to overcome the adverse COVID-19 circumstances, without giving into the temptation of putting themselves in the hands of the residential rental market to which they would have been tied, due to rental contracts likely higher – for a while – than the expected reactivation of the conventional tourism market. This is a line on which the platform itself is actively working, with a campaign developed in the midst of the pandemic¹³ with the aim of encouraging and guiding hosts by means of a kind of *manual* on adapting their homes and sales strategies to attract travellers looking for medium- to long-term stays, without the need to leave Airbnb behind as intermediary. The initiative is part of a broader strategy that includes consistent campaigns dedicated to attracting the growing segment of digital nomads and, in general, those who may be interested in taking advantage of the – new and temporary for some – option of working remotely and therefore temporarily moving to a more pleasant home and/or environment¹⁴. For this purpose, Airbnb has created a specific section within the platform (*Airbnb sublets*) so that people can search for accommodation for stays longer than 30 days, opportunely promoted through direct marketing campaigns among its users (Figure 1).

10 The website www.coliving.com alone displayed 20 offers in the Catalan capital for June 2021, with prices varying between €499 and €1586 a month. For more information: <https://coliving.com/barcelona>

11 “Barcelona se lanza a captar extranjeros que vengan a teletrabajar” (Barcelona launches campaign to attract foreign remote workers). *El Periódico* (17/03/2021). Available at: <https://www.elperiodico.com/es/barcelona/20210317/barcelona-lanza-captar-extranjeros-programa-teletrabajo-turismo-workation-11585505>

12 “Teleworking is here to stay – here’s what it means for the future of work”. *Horizon-Magazine* (01/09/2020). Available at: <https://horizon-magazine.eu/article/teleworking-here-stay-here-s-what-it-means-future-work.html>

13 «Airbnb y Booking viran hacia las estancias de larga duración” (Airbnb and Booking pivot to long-term stays). *Cinco Días* (08/09/2020). Available at: https://cincodias.elpais.com/cincodias/2020/09/07/companias/1599480393_930686.html

14 “From the Office to Any ‘Office’: Digital Nomads Turn to Airbnb”. *News Airbnb* (17/09/2020) Available at: <https://news.airbnb.com/from-the-office-to-any-office-digital-nomads-turn-to-airbnb/>

Figure 1
AIRBNB CAMPAIGN: “CHANGE YOUR PLACE FOR A CHANGE OF PACE”

Change your place for a change of pace



Explore longer stays nearby with everything you need to feel at home, and maybe some extras like a pool or an amazing view. You can even unlock special weekly or monthly discounts.

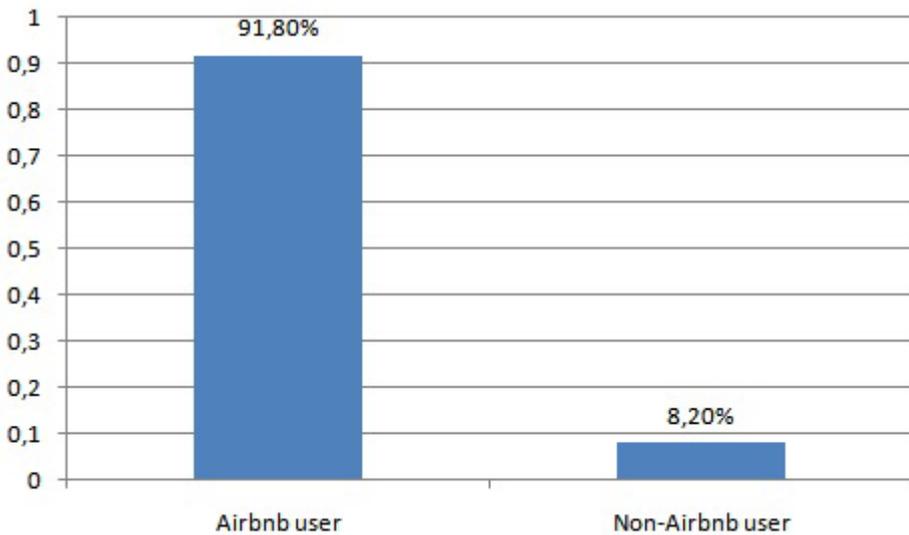
Source: [airbnb.com](https://www.airbnb.com)

An analysis of the databases related to the Airbnb supply seems to confirm this trend. For example, in just one year, the number of adverts that set 30 days as the minimum stay has increased from representing 19% of the supply to 32%, which equates to one in every three adverts. The platform is thereby proving to be a flexible tool available to operators so that they can adjust their marketing strategies within the broad setting of the non-residential accommodation market and thus seek better profitability in a very dynamic, yet complex, context. This flexibility can also be seen in the demand. While we can firstly confirm that the rapid and extraordinary popularity the platform has achieved – both in the media and the market – since its creation back in 2008, is reflected in the boom of short-stay rentals in the more conventional market of tourism hospitality and, Airbnb also seems to be becoming a global reference within the broad non-residential rental sector.

An analysis of housing tactics within the specific and above-mentioned postgraduate student community in Barcelona would seem to confirm this trend. This community features a concentration of middle-class profiles converging in the city from different

countries and continents, and for whom their studies in Barcelona represent an experience that is aligned with *cosmopolitan* lifestyles and *itinerant* backgrounds (Arias-Sans and Quaglieri-Domínguez, 2016). Firstly, it is worth demonstrating the extreme degree to which Airbnb has penetrated the market as a means of searching for housing solutions for the people who responded to the survey (49)¹⁵. Approximately 92% (45) stated they had used the platform at some time (Figure 2).

Figure 2
USE OF AIRBNB TO SEARCH FOR HOUSING SOLUTIONS AMONG THE STUDENTS SURVEYED

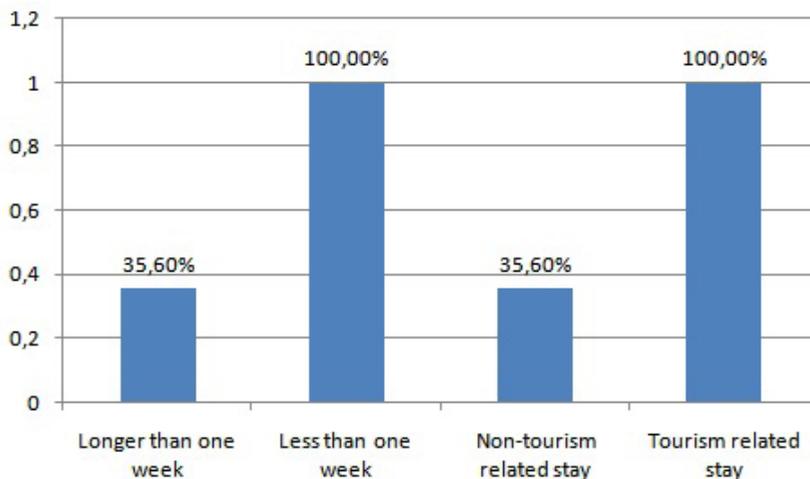


Source: Own survey.

Furthermore, while all respondents stated they had at some time used Airbnb for tourism purposes, a significant percentage declared they had done so for non-tourism purposes, such as: training, work, personal reasons, among others. As it is possible to see in the Figure 3, the 35.6% of the surveyed declares they used Airbnb for non-tourism purposes and they stayed longer than one week.

¹⁵ Of all the surveys distributed, there was a response rate of close to 10%, which is considered sufficiently significant for the purposes of this article.

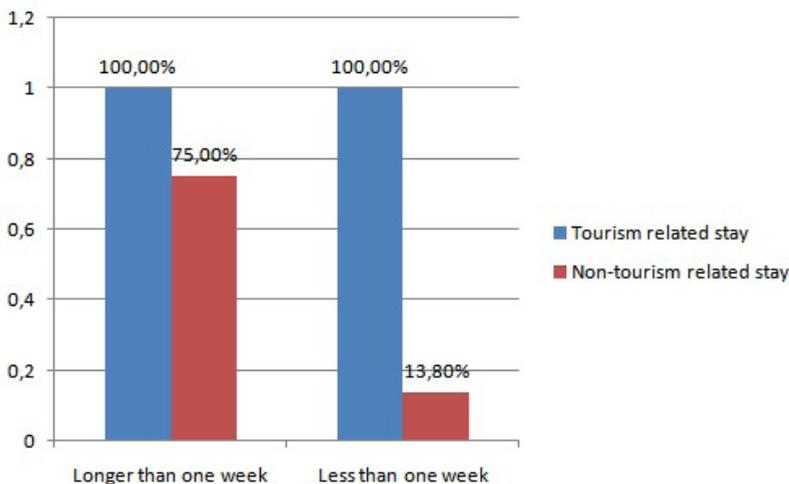
Figure 3
USE OF AIRBNB, ACCORDING TO DURATION AND TYPE OF STAY



Source: Own survey.

Additionally, 75% (12) of survey respondents who booked longer stays of over a week stated they had used the platform for non-tourism purposes. This percentage drops to 13.8% among those who stayed less than a week (Figure 4).

Figure 4
TYPE OF STAY ACCORDING TO DURATION



Source: Own survey.

With particular regards to those who have needed to find housing solutions in order to be able to complete their postgraduate studies in Barcelona, 35% (17) of those surveyed stated they had used Airbnb during the search process, with varied outcomes. Respondents justify this choice primarily based on the practicality the platform offers (59%, 10). While 35% (6) of them were aiming to find accommodation for the full stay or for the greater part of it, the remaining respondents stated they had used the platform to look for temporary solutions. In fact, the in-depth interviews conducted with some of the participants confirm the difficulty experienced by foreign students in finding cheaper, more stable solutions from a distance, due to the various formal requirements demanded by landlords, as well as the preference of some guests for visiting a home prior to committing to a rental contract lasting several months. One of the students interviewed explained that:

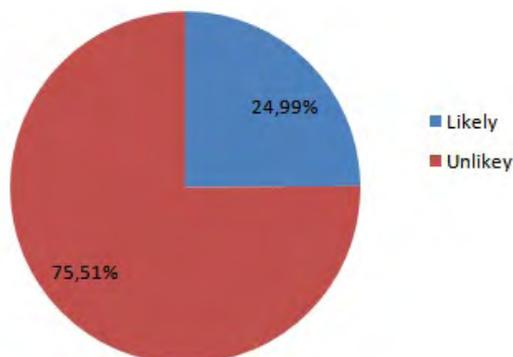
Personally, I use it strategically for places during the first few days, then when I get to know the place well I look for better location options, etc. Or the reverse, too: sometimes I arrive go to small hotels or hostels, and then I find an attractive offer for either a short or long stay somewhere, but on Airbnb, so I swap and change between different types of stay. Often it depends on the purpose of the stay – I’m basically a nomad, so I work from wherever I am, so I’m constantly moving around and I use different platforms in different scenarios.

The extraordinary ease of use and immediacy of access to the supply marketed through Airbnb would therefore seem to represent a clear – indeed, perhaps the most obvious – advantage. However, the field work also highlighted other issues to bear in mind such as, for example, the relatively high level of trust and familiarity the interviewees had with the platform and its procedures which, in contrast, they would not get with other channels that, although perhaps very popular at local or national level, are not known to someone coming from another country. The global nature of Airbnb certainly represents an advantage for extremely itinerant users who trust they will be able to find housing solutions in practically any place in the world. This was confirmed by another of the students interviewed, who explained that:

Yes, what happens is that when we arrive, at first of course we go to family for a few days, they told me “stay with us while you’re looking for a flat and everything, then later you can move on, no problem”. And I said: “OK”. So, looking for a flat from Peru is like trying to... I look at what level of confidence it’s going to give me, whether the flat is as it looks in the photos or whether when I arrive it’s totally different or, sometimes it’s even a scam because sometimes that happens.

In addition, when asked about potential moves related to stays over 30 days in the future, approximately four out of five of those surveyed say it is likely or possible that they will use Airbnb to find accommodation (Figure 5).

Figure 5
¿WOULD YOU USE AIRBNB TO FIND ACCOMMODATION FOR LONG STAYS (+30 DAYS) IN THE FUTURE?



Source: Own survey.

Finally, Airbnb would appear to be a familiar tool available to this population group, regardless of where they come from, to practically and quickly organise a convenient arrival at their destination and have time to familiarise themselves with a new environment and seek more convenient housing alternatives, in terms of both the accommodation and its location.

7. CONCLUSIONS

Urban tourism has become one of the main revitalising elements of local economies over the last three decades. Even with different speeds and applications, Barcelona has proven, particularly since the start of this century, to be an outstanding example of a *tourist city*. Since the creation of Airbnb in 2008 in the North American city of San Francisco, its presence has shaped many of the economic, political and legal dynamics of the Catalan capital. On a regulatory level, we can observe a certain tension in the way in which the activity of *platform capitalism*, focused on tourist accommodation, is addressed between the Barcelona city government and that of the Generalitat de Catalunya, with the former more restrictive and the second more pragmatic. However, it cannot be denied that the consideration of legal and regulatory instruments regarding tourism as a superstructure in synchrony with the characteristics of the Barcelona economy.

The processes of reconfiguring the regulatory frameworks relating to platform-mediated tourist accommodation that affect the city therefore continue to be inconclusive. However, an analysis of the economic, social and cultural codes of contemporary cities allows us to understand this phenomenon more clearly, with global influences and significant local implications. Decree 75/2020 from the Generalitat is not yet fully in force, which means that understanding its true scope, efficacy and consequences is a subject to be included on the agenda of cities such as Barcelona. While the COVID-19 pandemic has

contributed to a certain standstill of the negative impacts of tourism rental through Airbnb and similar platforms, it has nevertheless had significant implications for the dominant stances regarding the regulation of these actors. Therefore, despite its content and supporting arguments being published at the height of COVID-19, European recommendations continue to be to remove barriers and fees for these platform companies, which could be interpreted as though the pandemic were merely an interlude in the construction of a masterpiece: *Barcelona, tourist city*.

The normalisation of Airbnb use within the short-stay tourist accommodation market has generated a very familiarised and loyal demand for the platform, which can now be present itself as a valid form of searching for accommodation for longer stays also associated with professional or educational experiences. The global nature of Airbnb allows its users to access this platform with the aim of finding housing solutions from virtually anywhere in the world whereas, currently, the bulk of the not-strictly-tourist rental market is mediated by local or national operators. In that regard, the shared home option advertised on Airbnb could be an increasingly common way of finding an initial place to stay for nomadic populations seeking medium- to long-term stays.

Airbnb would therefore appear to be not just a tool but a global agent facilitating movement throughout the city for different itinerant populations with variable-length stays, including – perhaps significantly – those that use the platform to find an initial stopover in the area in which they already plan to settle in a more stable manner. This would make the platform the gateway to the city for a wide range of itinerant populations.

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ANNEX 1
List of interviewees

| Profile | Contacted | Replies | Interviews | Characteristics |
|-------------------------|------------------|----------------|-------------------|---|
| Hosters | 39 | 18 | 6 | Home sharing |
| Companies/Professionals | 19 | 7 | 2 | Bizz Flats AB Apartaments Turísticis |
| Associations | 7 | 7 | 6 | APARTUR ACABA Veïns i Anfitrions AAVV El Raval, Sant Antoni, Dreta de l'Eixample |
| Institutions | 1 | 1 | 1 | Ajuntament de Barcelona. Àrea de Vivienda |
| Guests | 5 | 5 | 5 | Estudiantes Posgrados |

ANNEX 2
Questions of the survey

1.- How would you define Airbnb?

A digital platform to find accommodation for short-term stays

A digital platform to find accommodation for stays of different lengths of time

Others

2.- Have you ever used Airbnb to find accommodation?

Yes

No

3.- What kind of accommodation have you found through Airbnb? Please indicate all the options you agree with.

Entire apartments

Rooms in homes with residents ("home-sharing")

Rooms in shared flat with other tourists (hostel type)

Others

4.- For what duration have you used Airbnb? Indicate all the options you agree with

For stays of less than one week (1-6 nights)

For stays between one week and 30 days

For stays longer than 30 days

5.- For what kind of stays have you used Airbnb?

For tourist stays only

For tourist and non-tourist stays

For non-tourist stays only

6.- For what type of non-”tourist” stays have you used Airbnb? Please indicate all the options you agree with.

Work/professional stays

Educational stays, study visits

Stays for personal reasons (family, medical)

Others

7.- For your studies in Barcelona did you need to stay in a different accommodation than your usual residence?

Yes

No

8.- Have you used Airbnb to search for accommodation related to your stay in Barcelona?

Yes, I have found accommodation through Airbnb.

Yes, I searched (also) through Airbnb but finally found accommodation through other channels.

I have not used Airbnb or browsed it

9.- In relation to your stay in Barcelona, when did you search for accommodation on Airbnb?

Before arriving in Barcelona

Once in Barcelona

Before and after arriving in Barcelona

10.- What kind of solution have you sought through Airbnb?

A temporary solution, before coming up with something more convenient.

Accommodation for all or most of my stay

11.- Why have you turned to Airbnb for accommodation?

I did not know other channels or web portals

It seemed to me the most practical option

I could not find accommodation through other channels.

Others

12.- Was the flat you stayed in previously used as a tourist accommodation?

Yes, only one or some rooms

Yes, the whole flat

No

I don't know

13.- Why haven't you used Airbnb to find accommodation for your study stay in Barcelona?
Because I didn't need to: I already had contacts in the city or an accommodation available before I arrived.

Because I did not consider it convenient: I preferred to use other sources

Because it didn't occur to me

Why I am not in favour of using Airbnb

Others

14.- Why haven't you ever used Airbnb?

Because I am not interested in the type of accommodation offered through the platform.

Because I am not in favour of using Airbnb

For no particular reason

Others

15.- For future long stays (+ 30 days), would you use Airbnb to find accommodation?

Probably

It's possible, I don't discard it

I don't think so

Surely not

Others

16.- To complete the above information, we need some socio-demographic data. Specifically, please indicate:

Male

Female

Non-binary

17.- Your country of origin (in the case of Spain, indicate Autonomous Community)

18.- The starting year of your study stay in Barcelona (YYYY)

19.- The length of your study stay in Barcelona (indicate the number of months)

20.- Your age group at the time of your study stay in Barcelona

18-25

26-30

31-35

36+

20.- Would you be willing to participate in a short interview? If so, please provide us with your name and email address.

21.- The results of this survey will be part of a forthcoming publication. If you would like to receive a copy of the study, please provide us with your name and email address.