



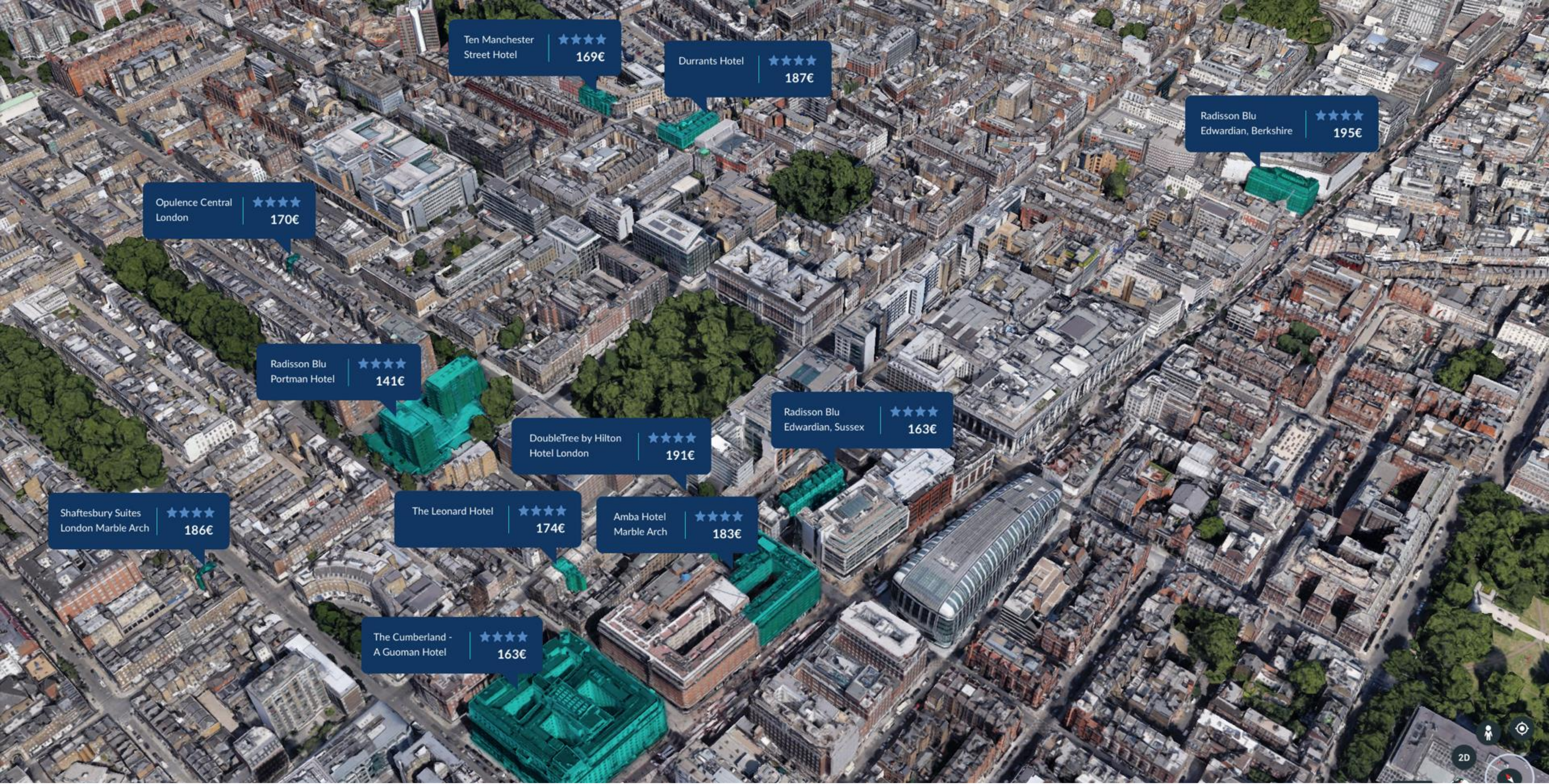
SHORT-TERM RENTALS AND VISITOR MANAGEMENT

Fernando Dal Re

VP Marketing & Public Sector Lead
fernando@seetransparent.com

TRANSPARENT

ETOA



Ten Manchester Street Hotel | ★★★★★ | 169€

Durrants Hotel | ★★★★★ | 187€

Radisson Blu Edwardian, Berkshire | ★★★★★ | 195€

Opulence Central London | ★★★★★ | 170€

Radisson Blu Portman Hotel | ★★★★★ | 141€

DoubleTree by Hilton Hotel London | ★★★★★ | 191€

Radisson Blu Edwardian, Sussex | ★★★★★ | 163€

Shaftesbury Suites London Marble Arch | ★★★★★ | 186€

The Leonard Hotel | ★★★★★ | 174€

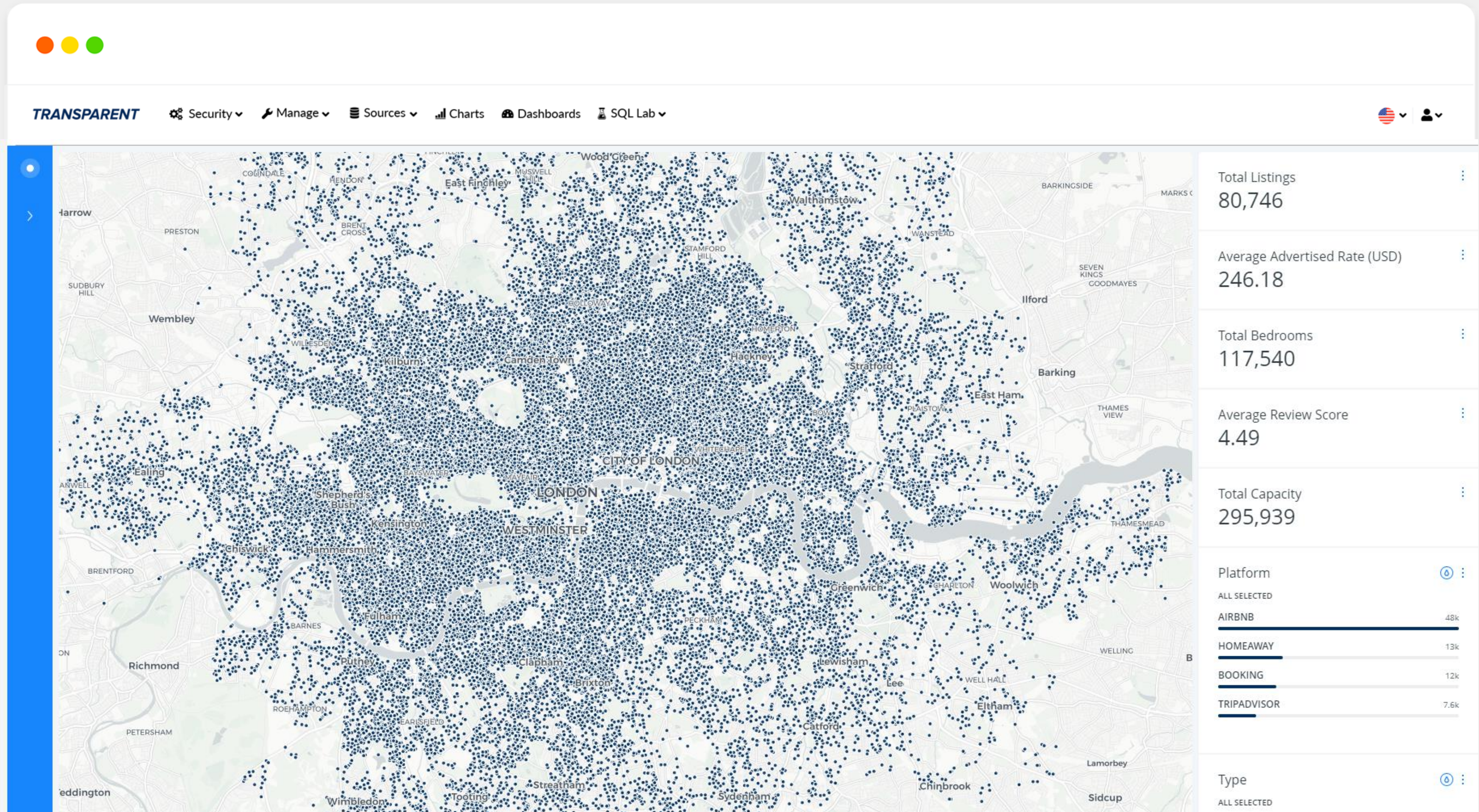
Amba Hotel Marble Arch | ★★★★★ | 183€

The Cumberland - A Guoman Hotel | ★★★★★ | 163€

The Hospitality Industry is Getting Disrupted by **Private Accommodations**



LONDON SHORT-TERM RENTALS MAP



**1 in every 4 \$ spent on lodging
is for Private Accommodations**



THE INDUSTRY NEEDS MORE DATA



No Data available for Pricing,
Demand and Strategy



Home
Owners



Real Estate
Investors



Property
Managers



Hotel & Hotels
Developers



Destinations



Short-term
Rental Sites



TRANSPARENT

The Data Source of Record
for the Short-term Rental Industry



28 million

Listings ⁽¹⁾

⁽¹⁾ Global short-term rentals density as of June 2019
Transparent Intelligence

ABOUT TRANSPARENT

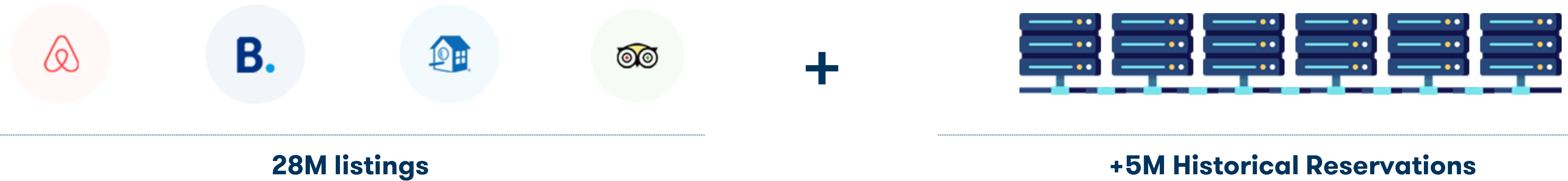
Mission

Bring greater understanding to the vacation rental industry through reliable, objective data.

Team

25 employees, based in US & Europe, backed by Venture Capital investors

Data



Clients

Booking.com

SYKES cottages

ACCOR HOTELS

Phocuswright
Powering great decisions.

KPMG

TRANSPARENT'S EXPERIENCE WITH DESTINATIONS

Worked for four **National Tourist Offices** in Europe



Worked for Destinations both in Europe and the USA

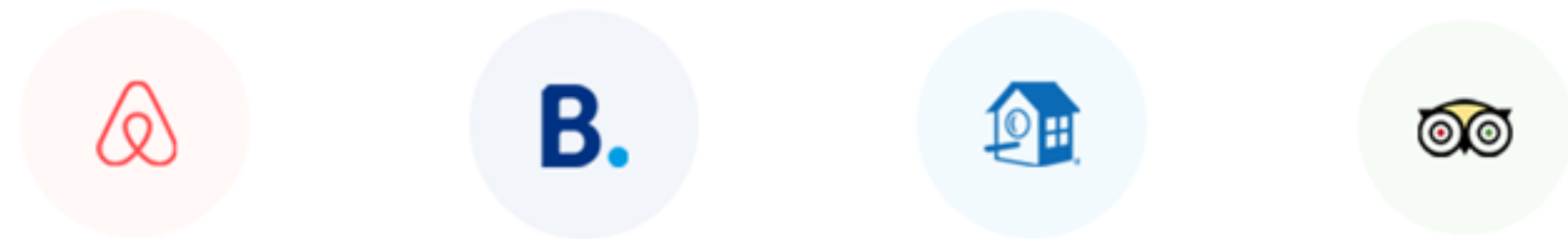




Transparent's Methodology For Measuring Short-Term Rentals

METHODOLOGY OVERVIEW

Indexed Public Data



Major online platforms

- ✓ Supply
- ✓ Rate
- ✓ Availability

Broad Coverage

+

Private Data Feed



Property Management Software Partners

- ✓ ADR
- ✓ Occupancy
- ✓ Party Size
- ✓ Booking Window
- ✓ Length of Stay

Precision

Source

Metrics

Advantages

METHODOLOGY: DEDUPLICATION

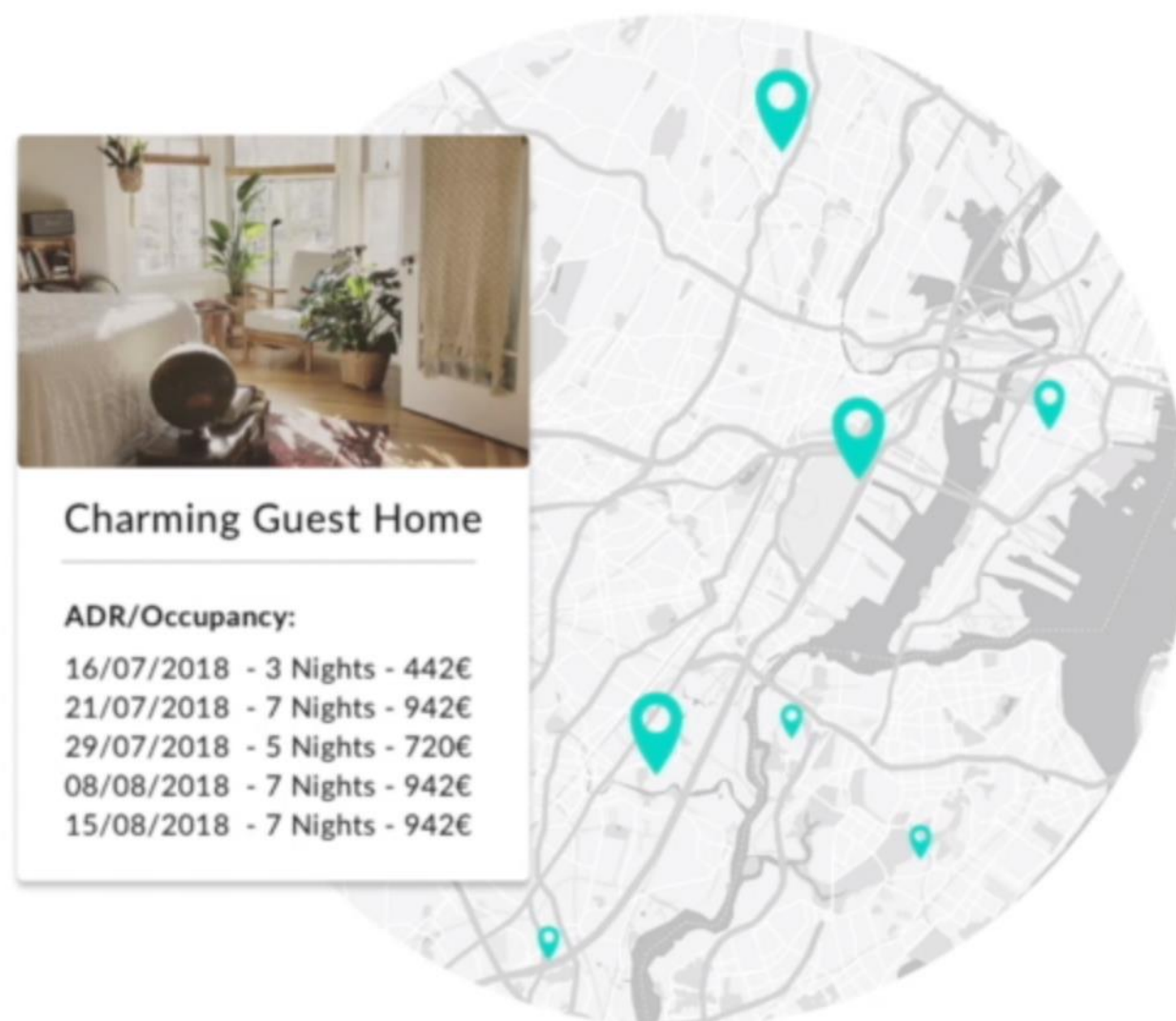
Platform	Title and location	Bedrooms	Guests	Bathrooms	Property	Manager
AIRBNB	Douro Villa with swimming pool San Francisco, CA 94102, USA	4	8	2.5	House	Maria Henriqueta
HOMEAWAY	PENTHOUSE San Francisco, CA 94102, USA	4	7	2	House	Maria Henriqueta

City: Created Butte / Distance: (meters)

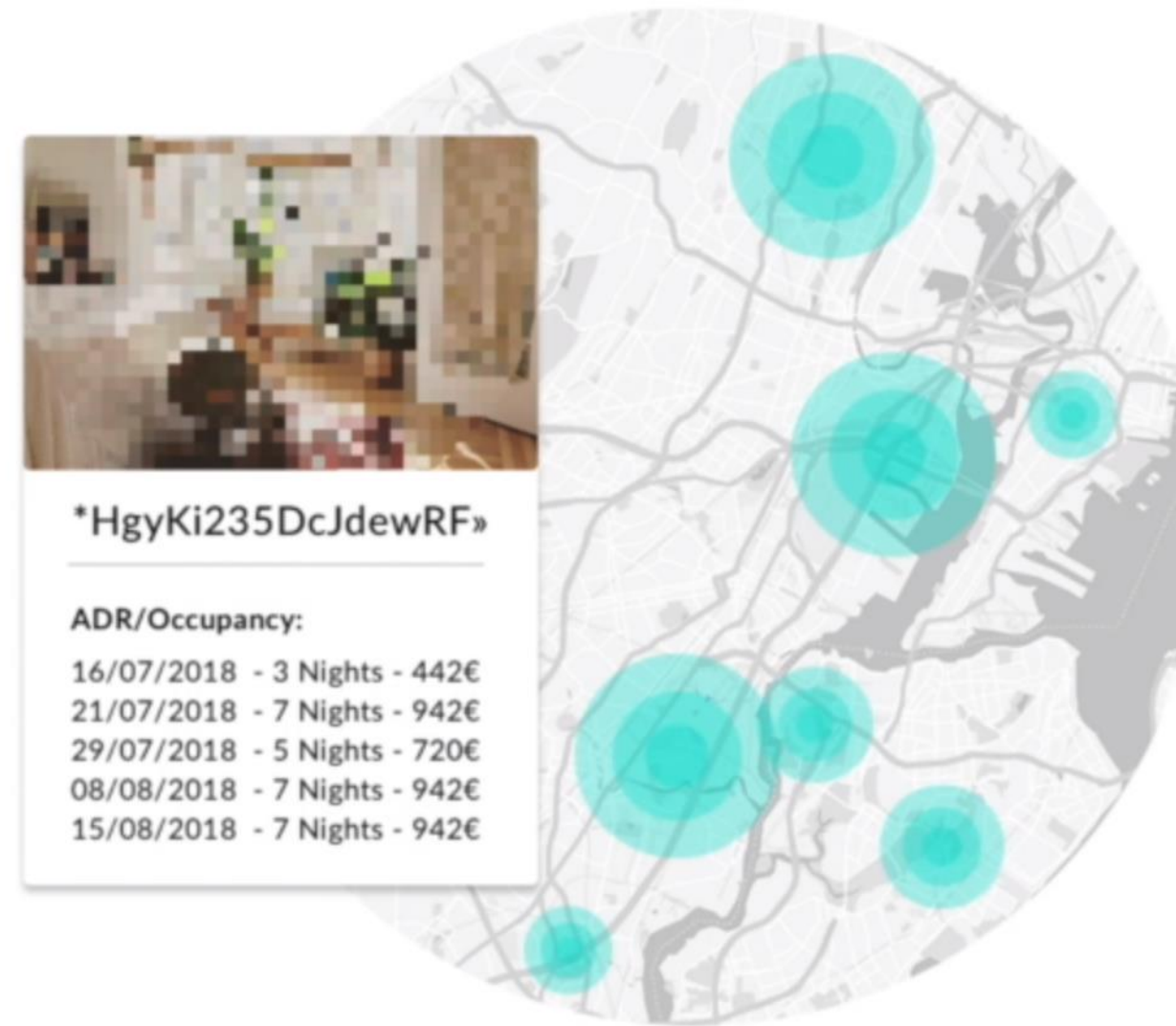
✕ BACK TO INDEX
← →
✓ SAME PROPERTY
🏠 SAME BUILDING
✕ NOT A DUPLICATE

METHODOLOGY: PARTNER DATA FEED

Data Partner



TRANSPARENT



- ✓ Average Occupancy
- ✓ ADR
- ✓ Average Length of Stay
- ✓ Average Booking Window
- ✓ Average Party Size



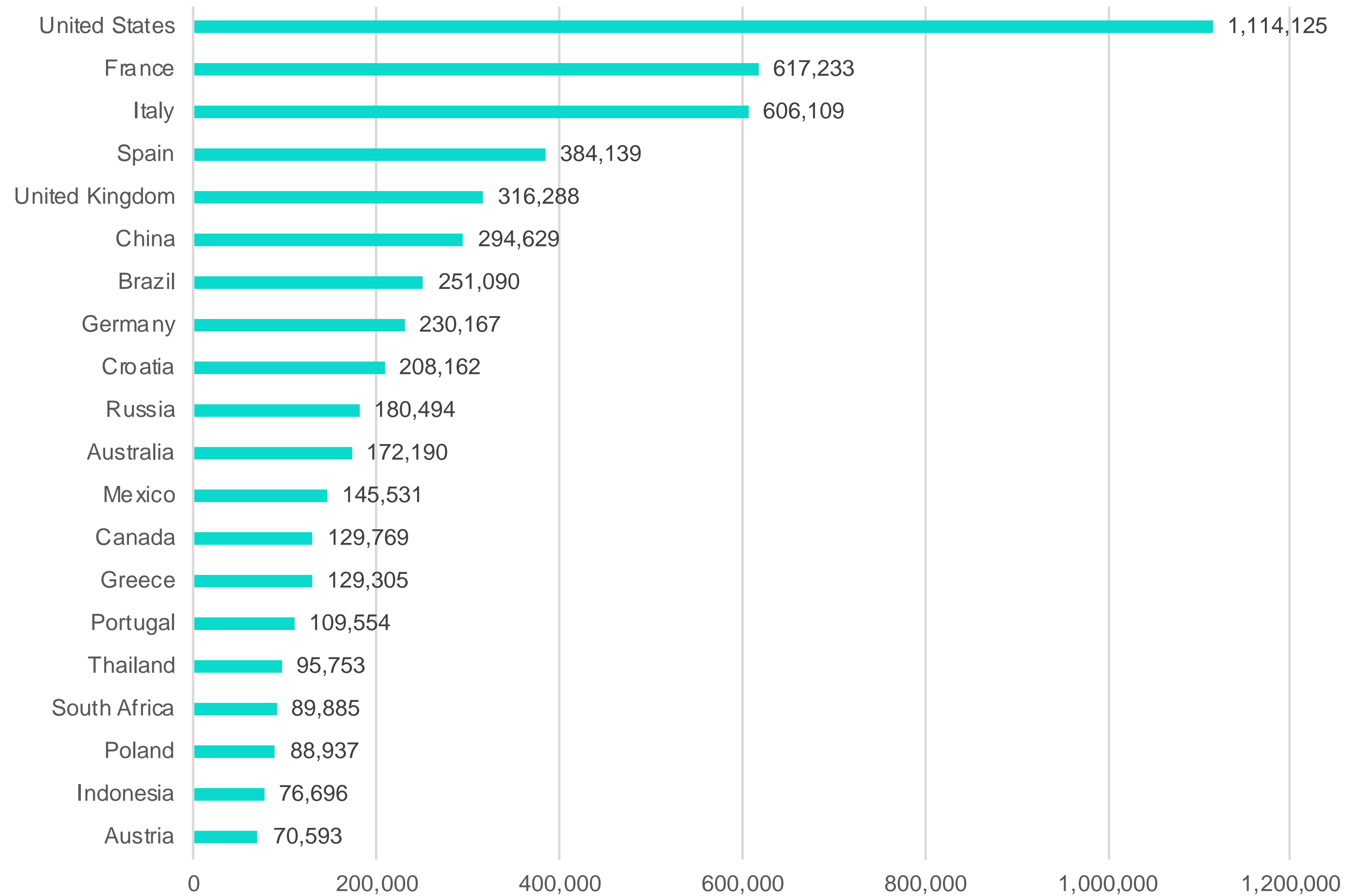
The European Short-Term Rental Industry

(by the numbers)



Not so big?

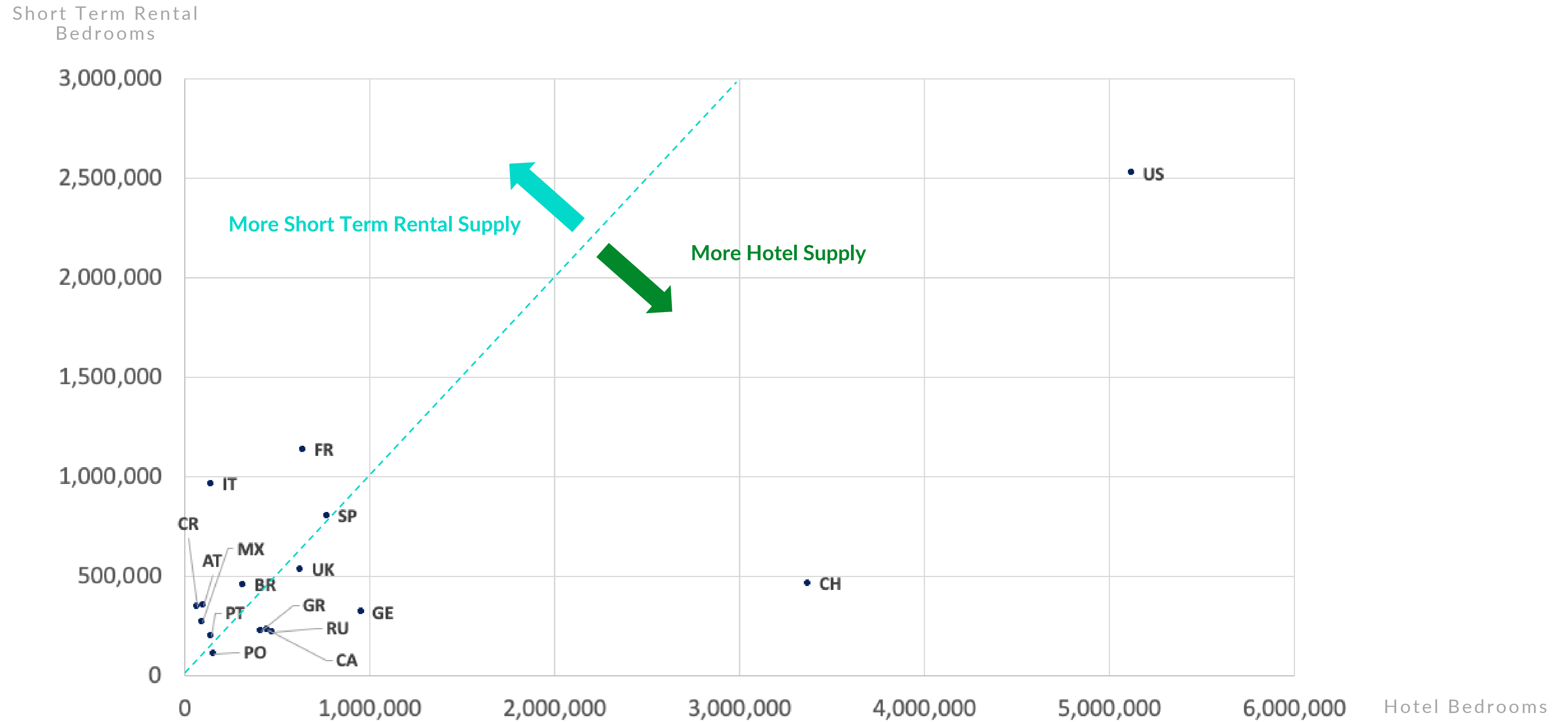
NUMBER OF UNIQUE PROPERTIES BY COUNTRY





Irrelevant compared to hotels?

VACATION RENTAL vs. HOTEL SUPPLY





Beach Houses and Cottages?

EUROPE - LISTINGS BY SUBTYPE OF PROPERTY



44%

APARTMENT



25%

HOUSE



5%

GUEST HOUSE



4%

VILLA



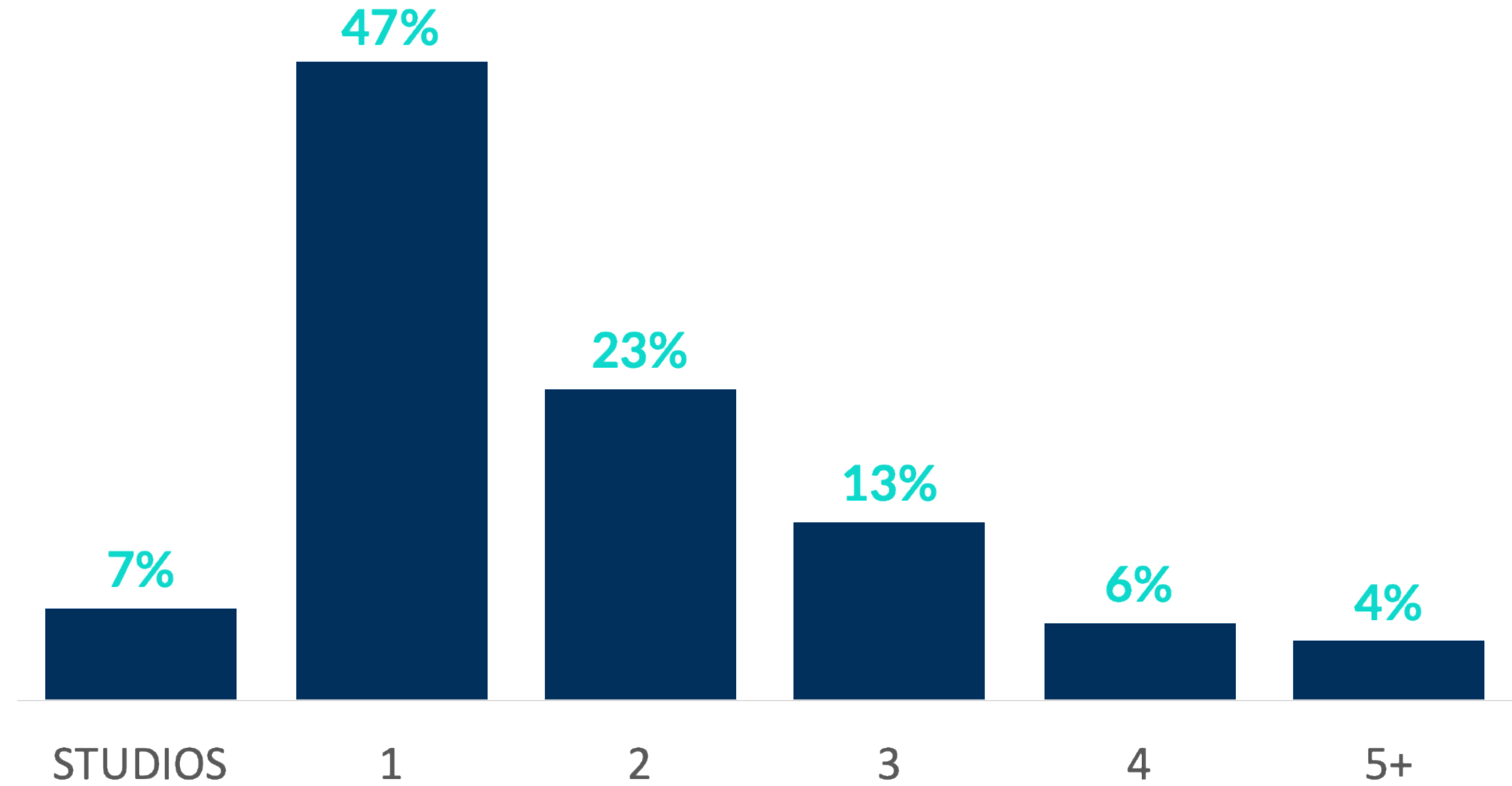
22%

OTHER



For families and large groups?

BREAKDOWN BY SIZE

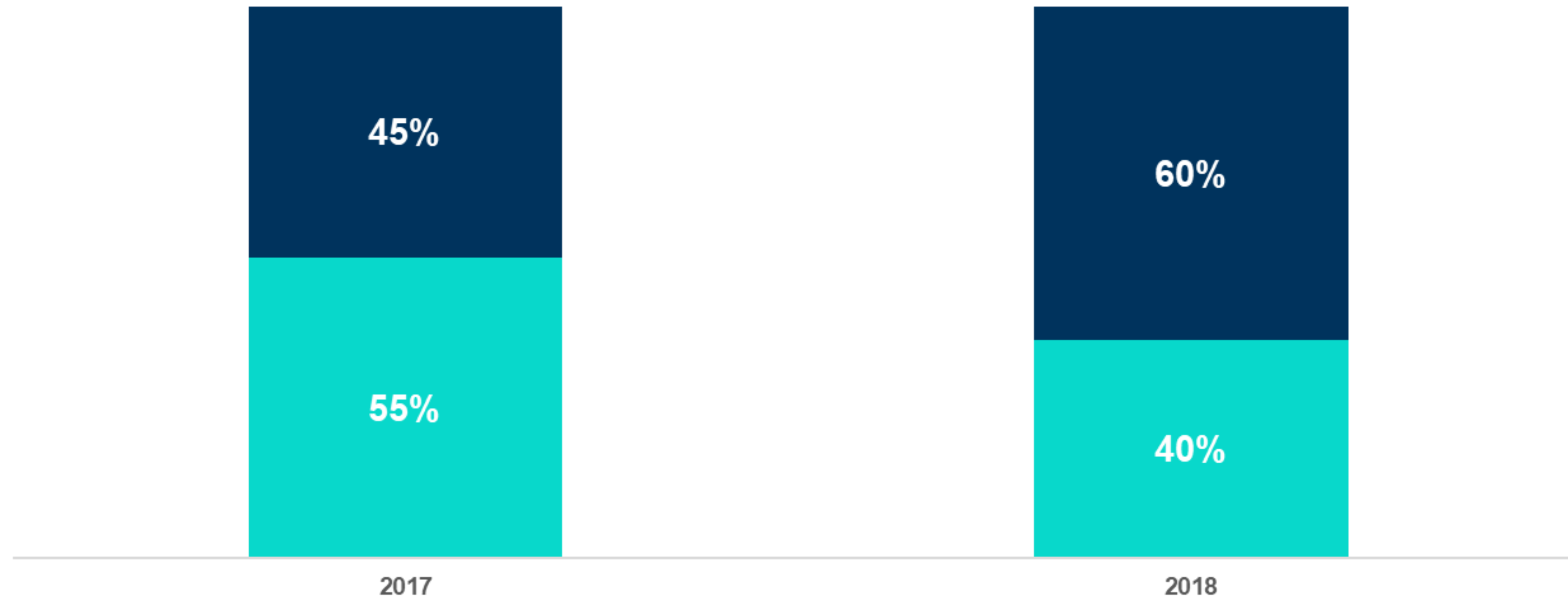




Leisure?

SUPPLY BY DESTINATION TYPE

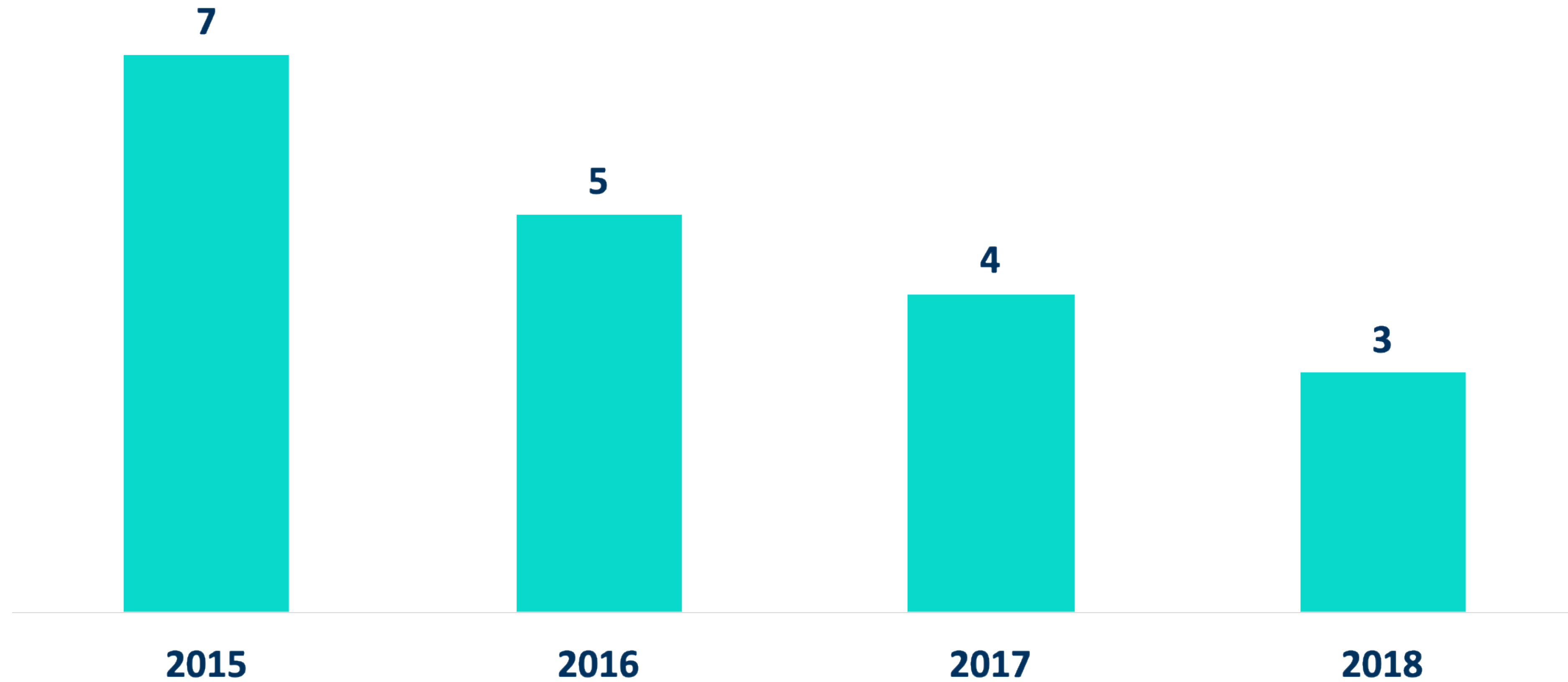
Leisure Urban





One week vacation?

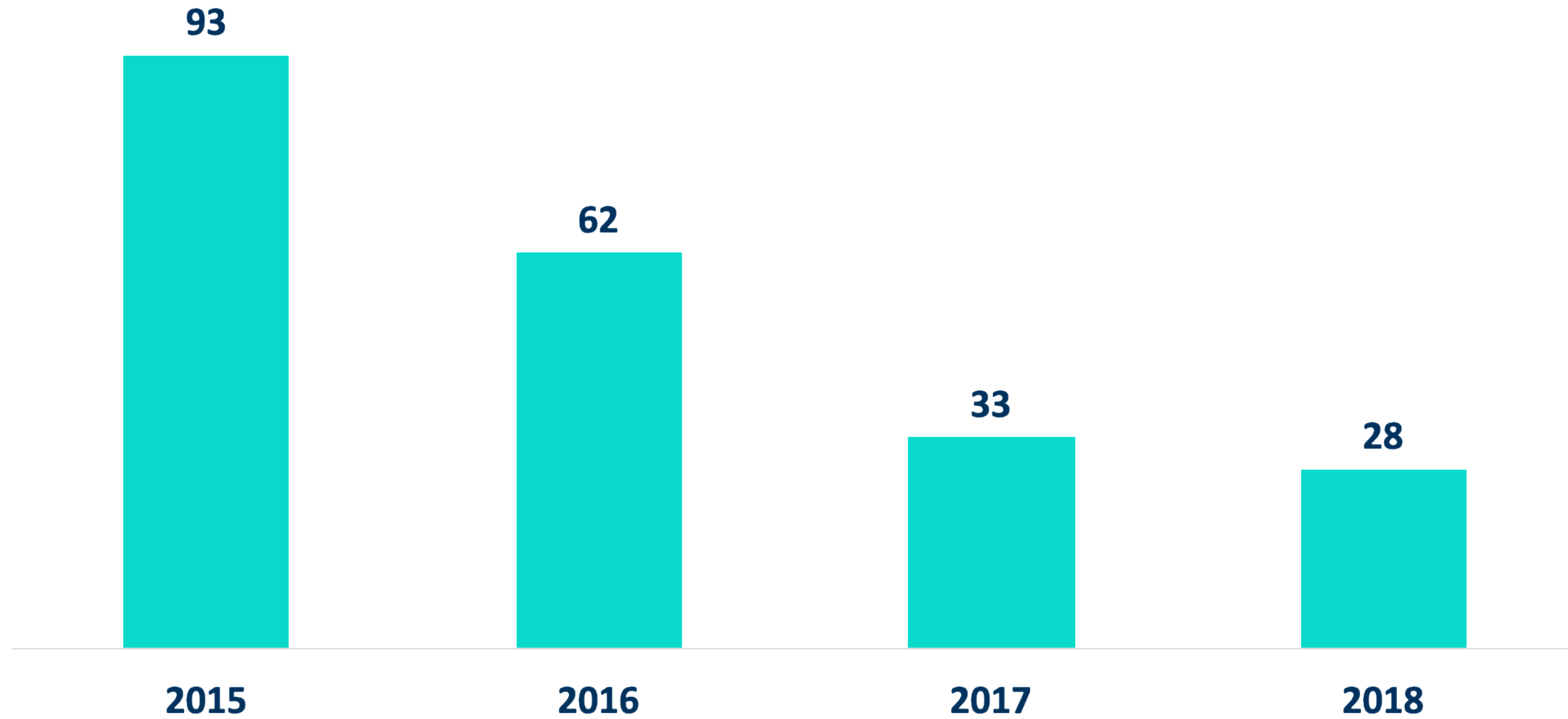
EVOLUTION OF THE LENGTH OF STAY





Planning one year ahead?

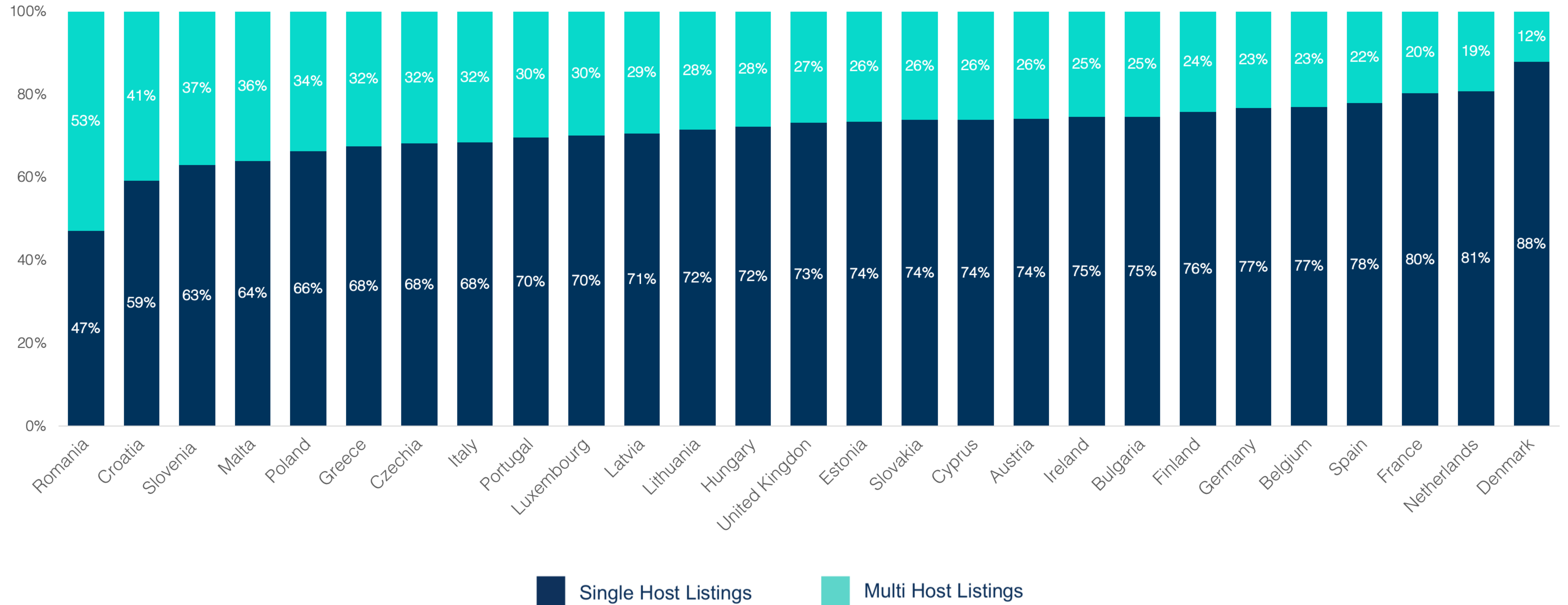
EVOLUTION OF LEAD TIME



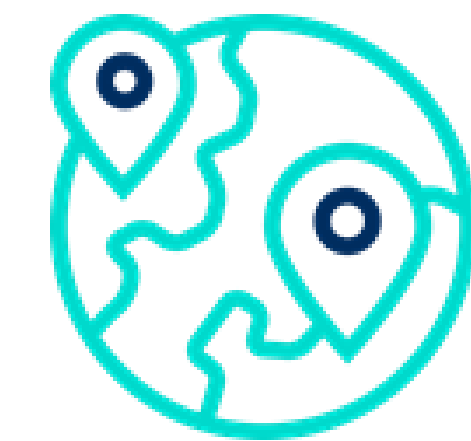
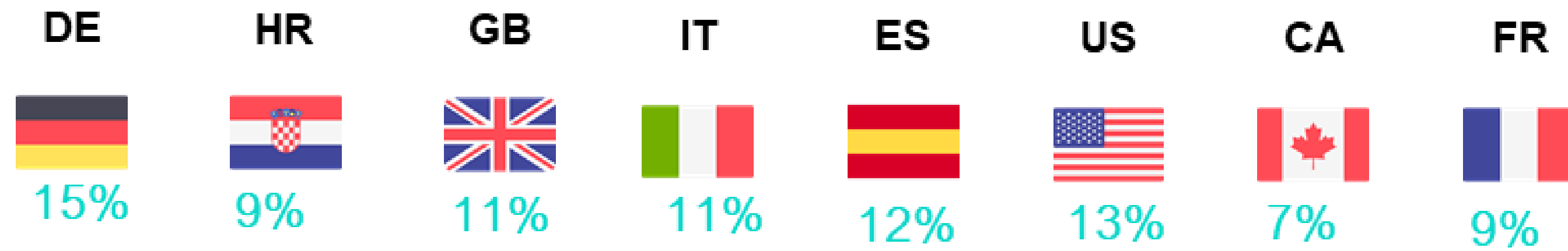
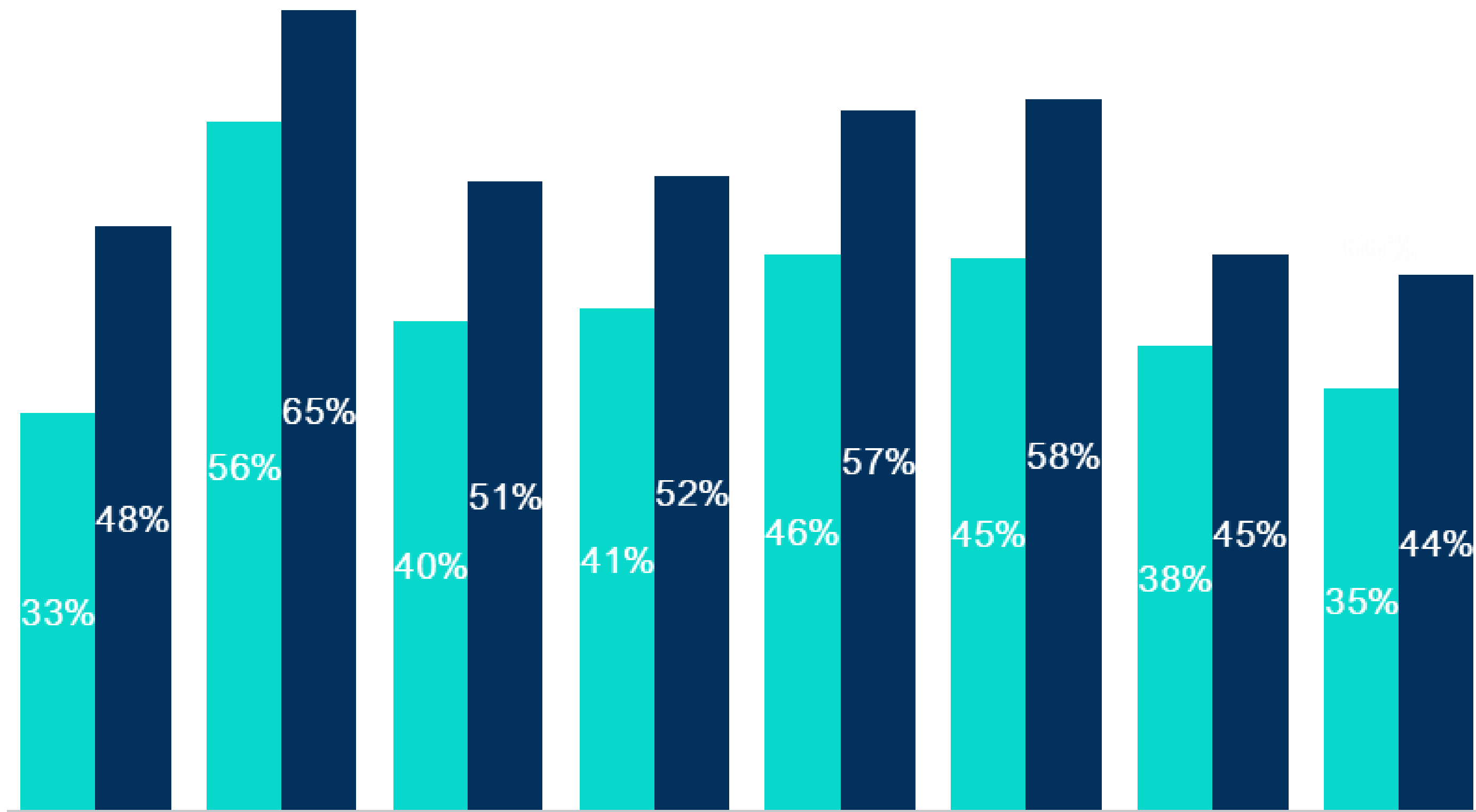


Sharing Economy?

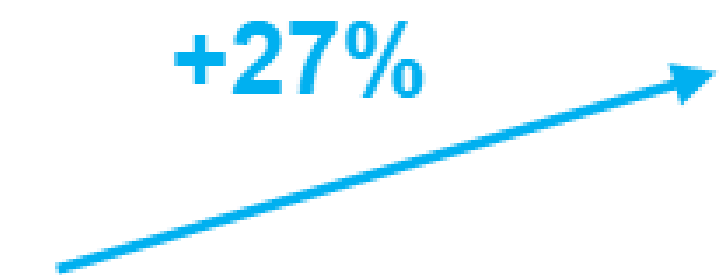
HOST TYPE BY COUNTRY



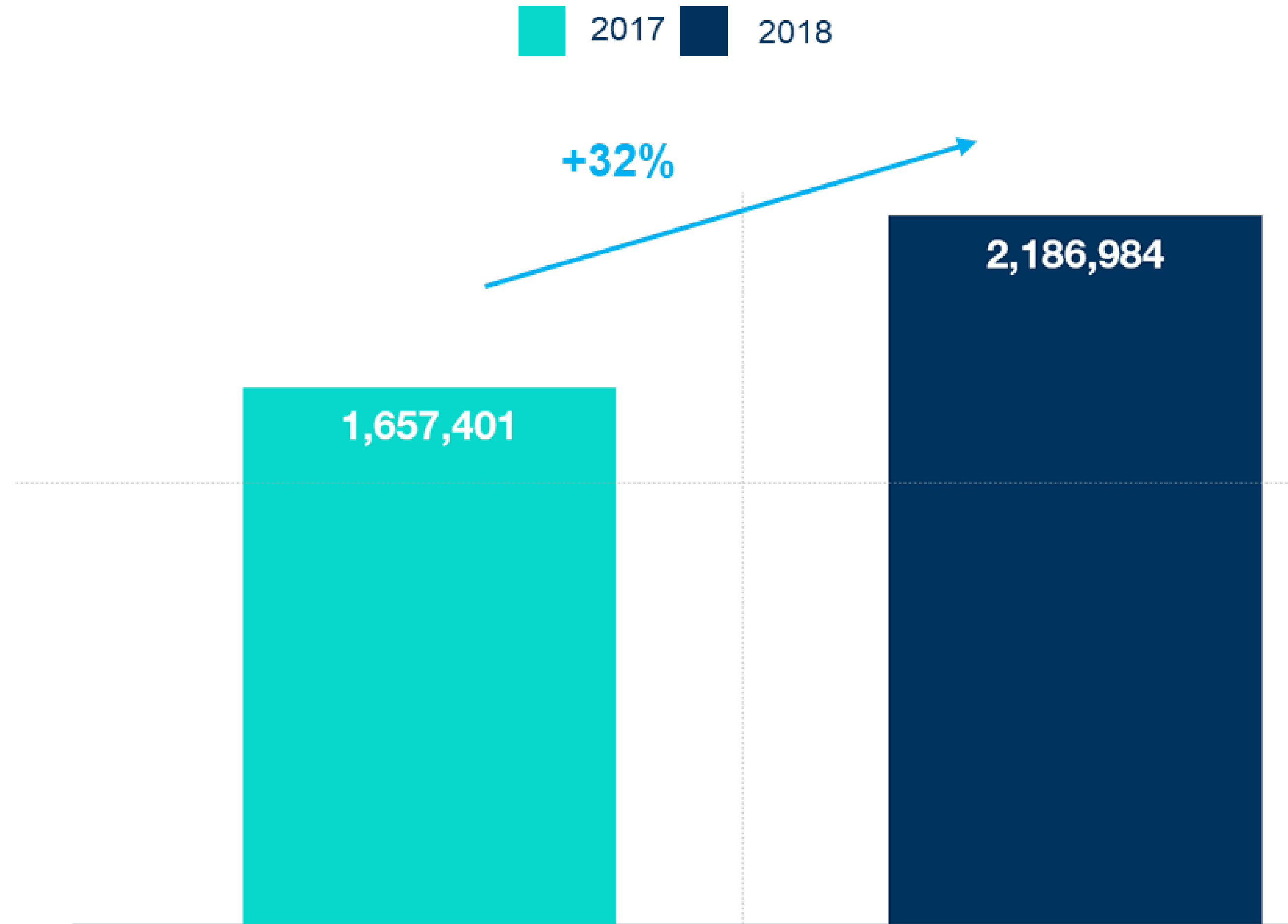
INSTANT BOOKABLE BY COUNTRY



LISTINGS BY COUNTRY



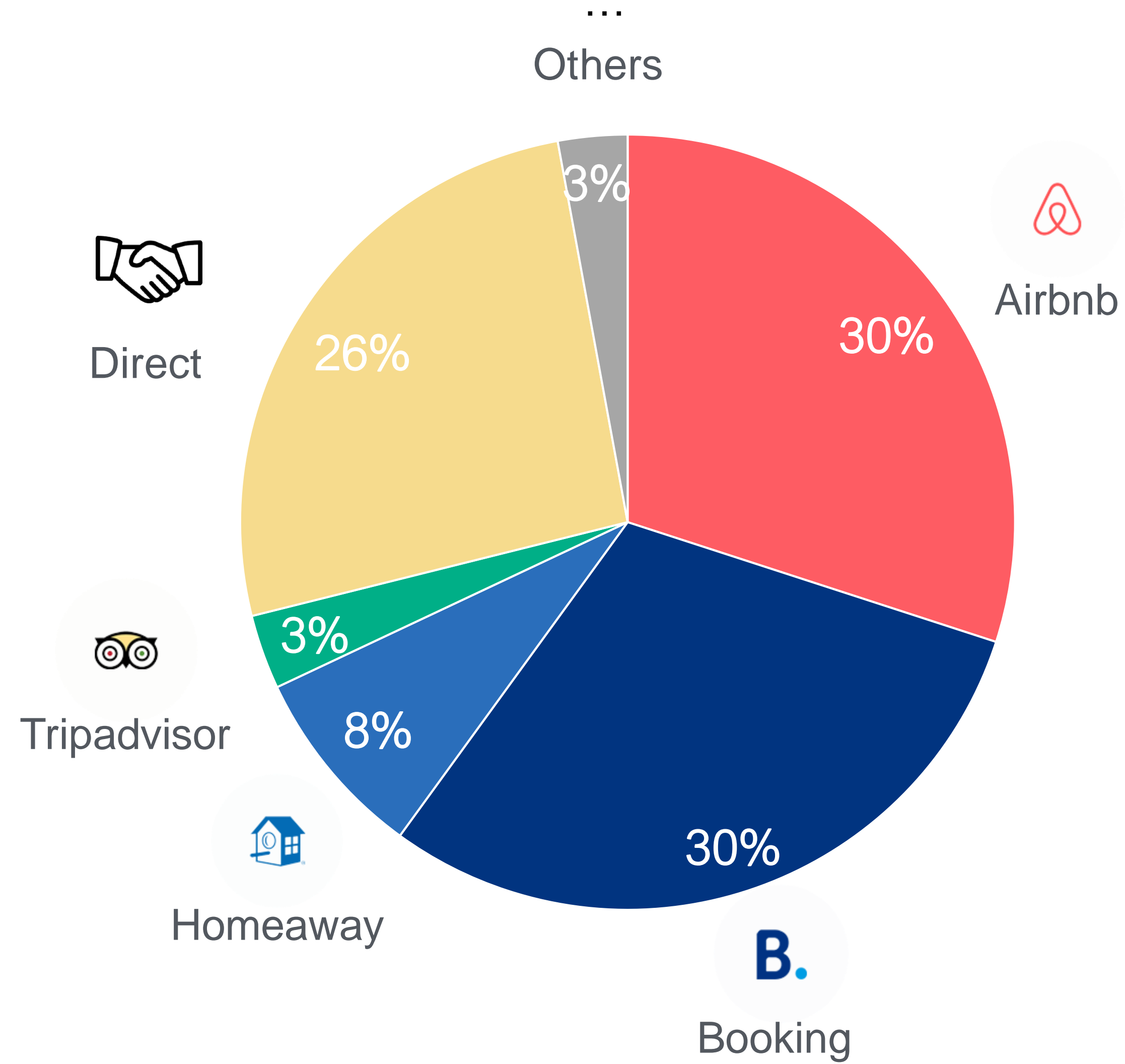
SUPPLY MANAGED BY THE TOP 20% OF HOSTS





Different Distribution?

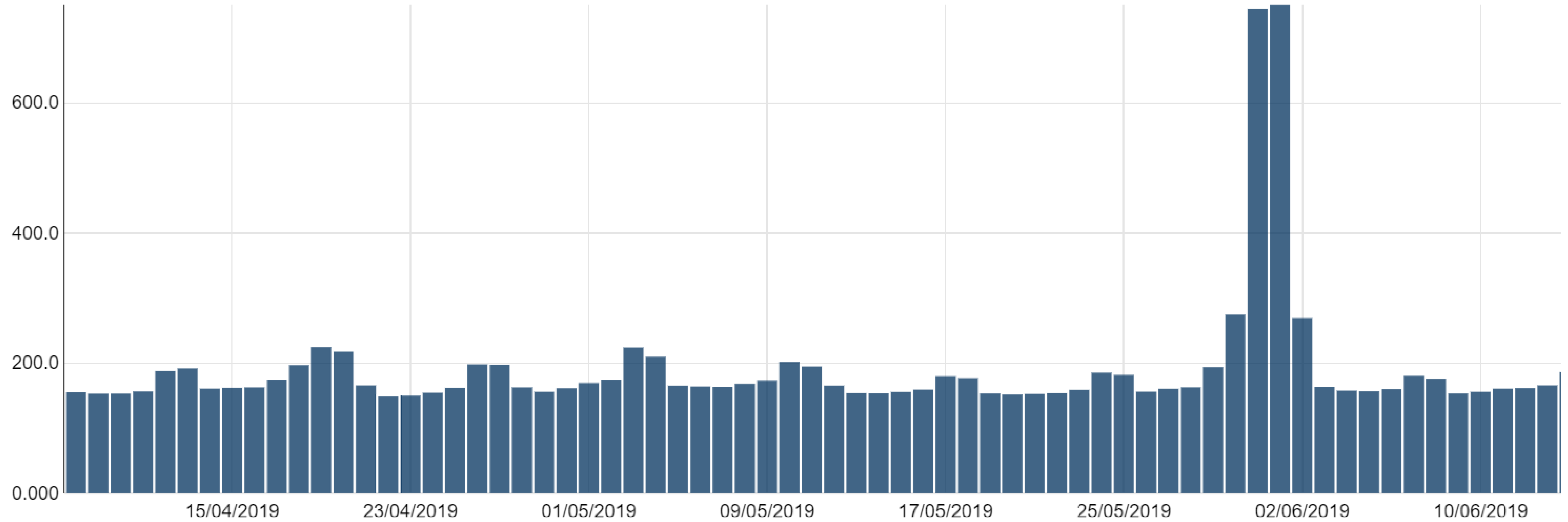
THIRD PARTY CHANNELS ARE KEY TO DISTRIBUTION



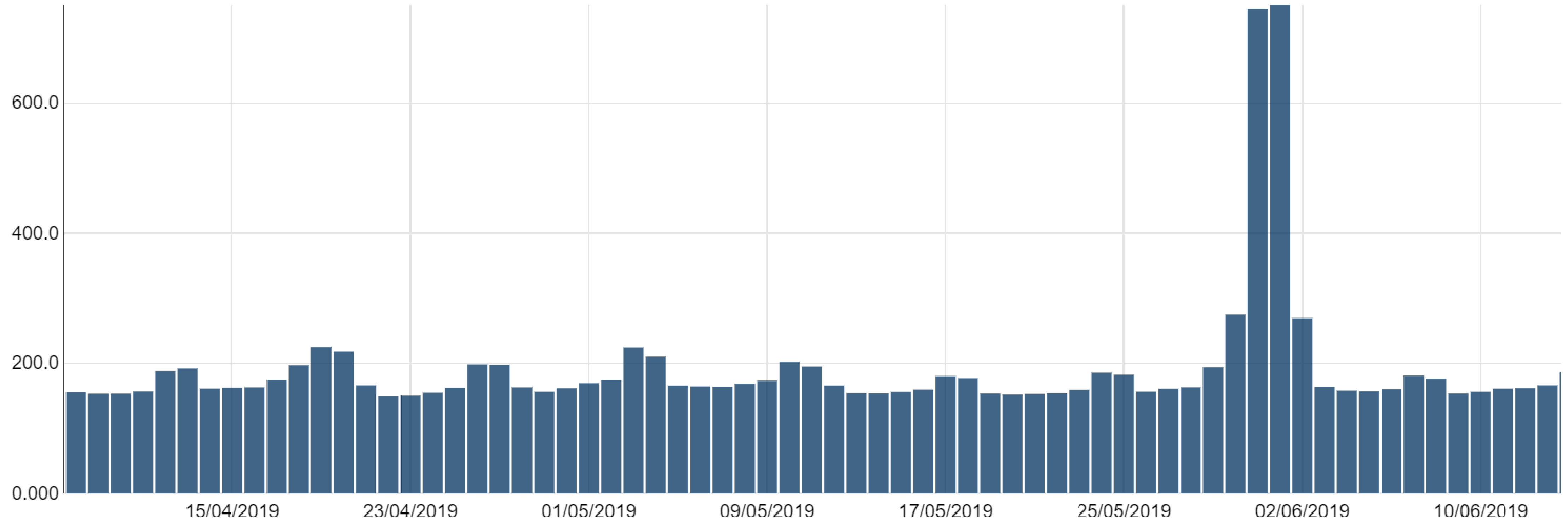


Events

SHORT-TERM RENTALS & EVENTS



SHORT-TERM RENTALS & EVENTS





Regulations

REGULATIONS

New regulations will harm my business	
Country	TRUE
 Portugal	81%
 Spain	78%
 Greece	75%
 France	69%
 UK	59%
 Switzerland	56%
 Italy	48%

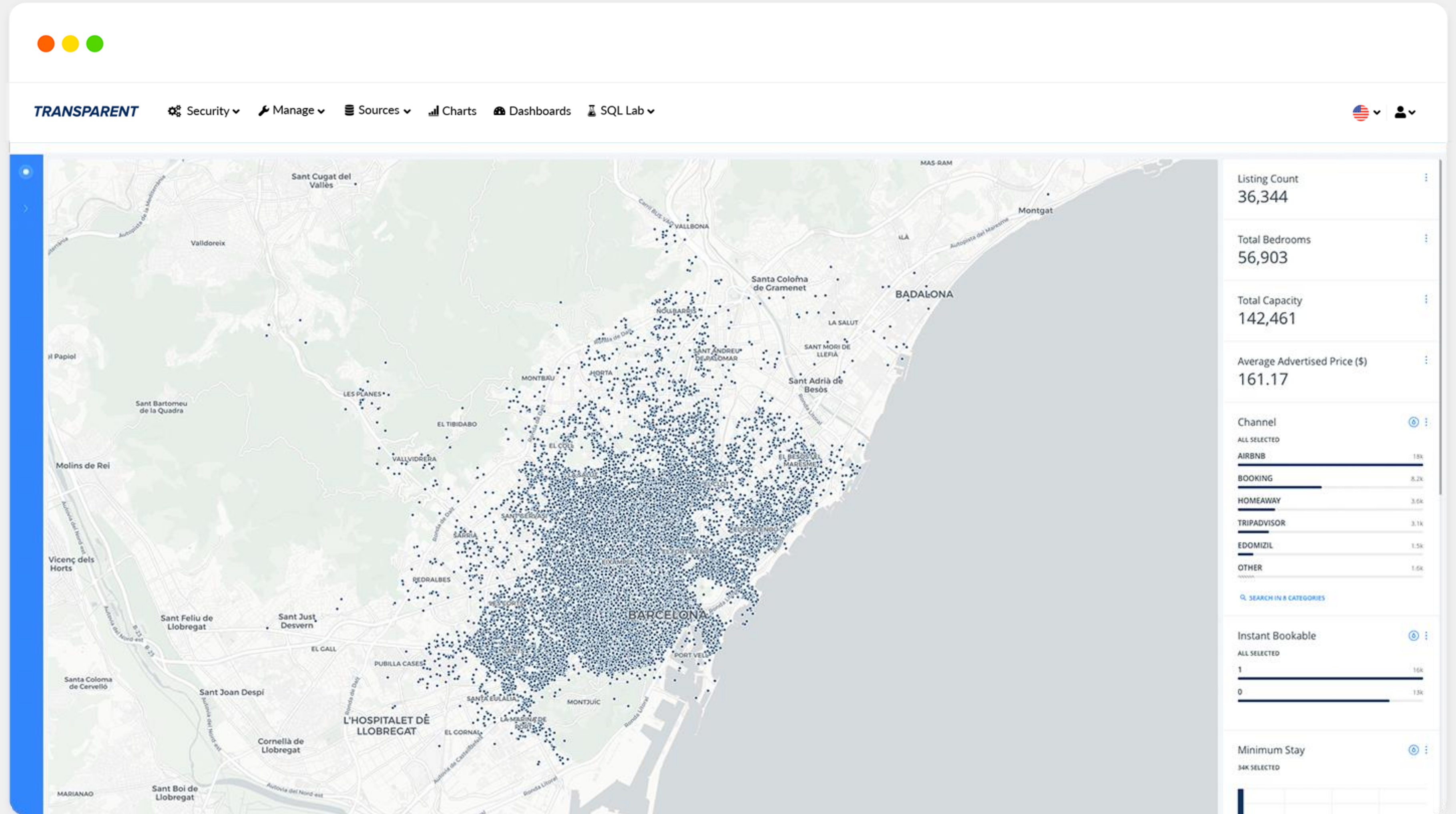


Short-Term Rentals

WHAT TO MEASURE?

SUPPLY INTELLIGENCE

- ✓ Supply Growth
- ✓ Real de-duplicated Supply
- ✓ Real Capacity
- ✓ Compliance controls



TRAVELERS INTELLIGENCE

- ✓ Top Visiting Countries
- ✓ Travelers seasonality
- ✓ Preferred accommodations
- ✓ Benchmarking analysis

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[Security](#)
[Manage](#)
[Sources](#)
[Charts](#)
[Dashboards](#)
[SQL Lab](#)

Top 5 Countries of Origin (last 12m)

Monthly	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18
#1												
#2												
#3												
#4												
#5												

Country / Bedrooms

Country / Bedrooms	0	1	2	3	4
FR	7%	63%	24%	6%	1%
ES	5%	69%	21%	4%	1%
DE	6%	63%	25%	5%	1%
GB	6%	60%	25%	8%	2%
IT	7%	68%	20%	4%	1%
NL	6%	61%	26%	5%	2%
BR	5%	67%	22%	5%	1%
US	5%	61%	24%	8%	1%
CH	6%	60%	26%	7%	1%
RU	4%	76%	17%	2%	1%
Average	6%	65%	23%	5%	1%

Country / Bedrooms	0	1	2	3	4
PT	5%	79%	12%	3%	1%

Travel split (Domestic vs. Intl. last 12m)

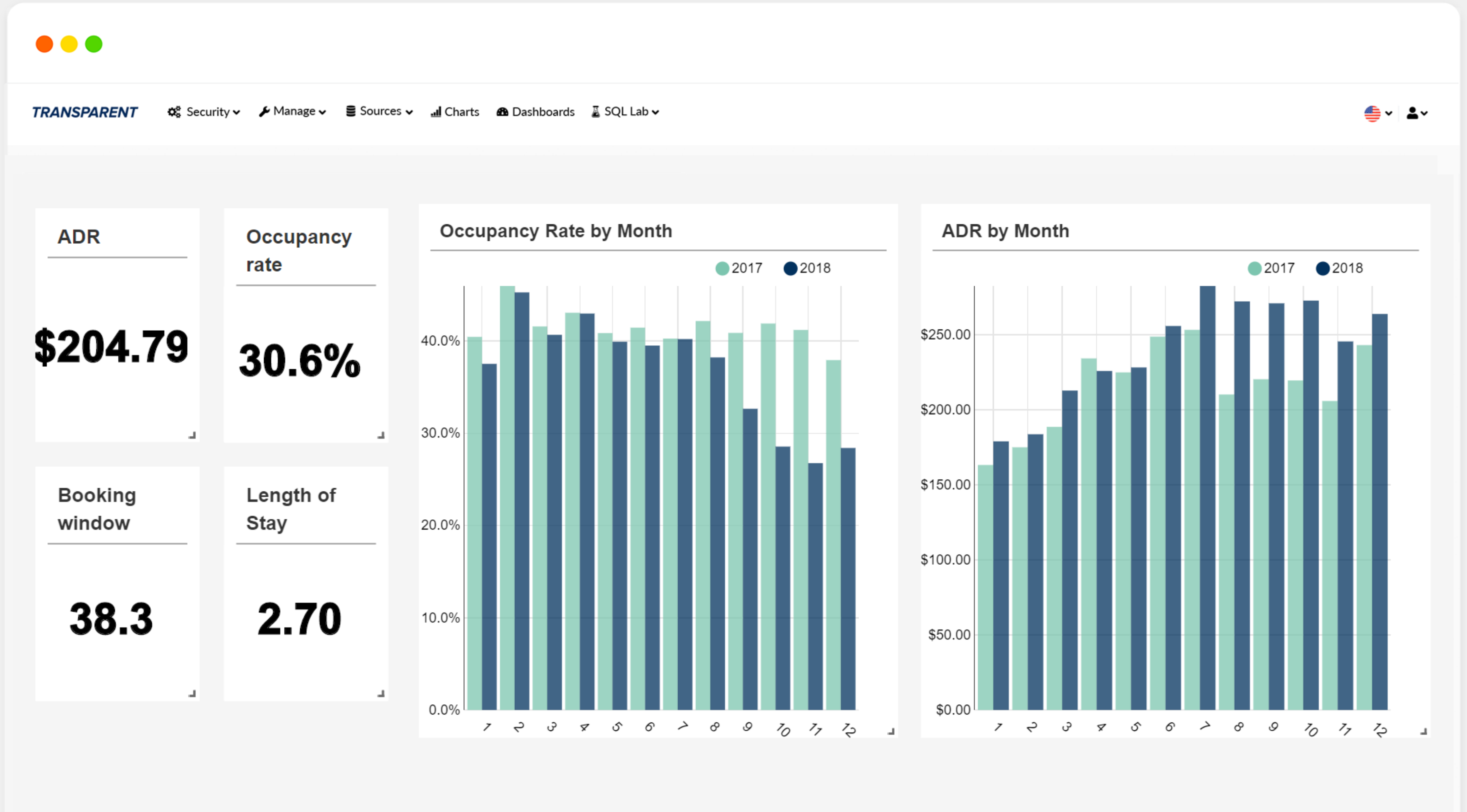
	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18
Domestic	8%	7%	11%	12%	10%	12%	8%	12%	10%	8%	16%	10%
Internacional	92%	93%	89%	88%	90%	88%	92%	88%	90%	92%	84%	90%

Total number of reviews per year

Year	Total Reviews
2010	1
2011	17
2012	87
2013	366
2014	814
2015	2210
2016	5880
2017	14203
2018	16158 est (5396 base)

REAL HISTORICAL PERFORMANCE

- ✓ ADRs
- ✓ Length of Stay
- ✓ Booking Window
- ✓ Occupancy Rates
- ✓ Party Size





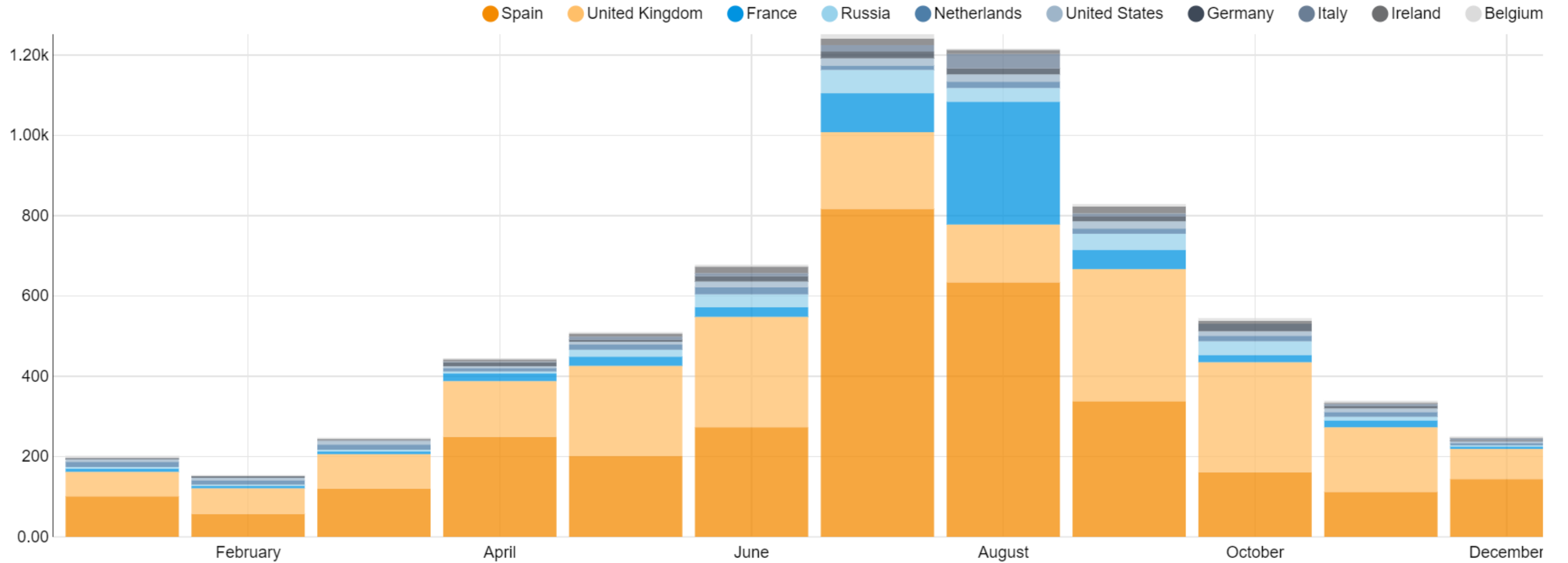
Short-Term Rentals and **VISITOR MANAGEMENT**



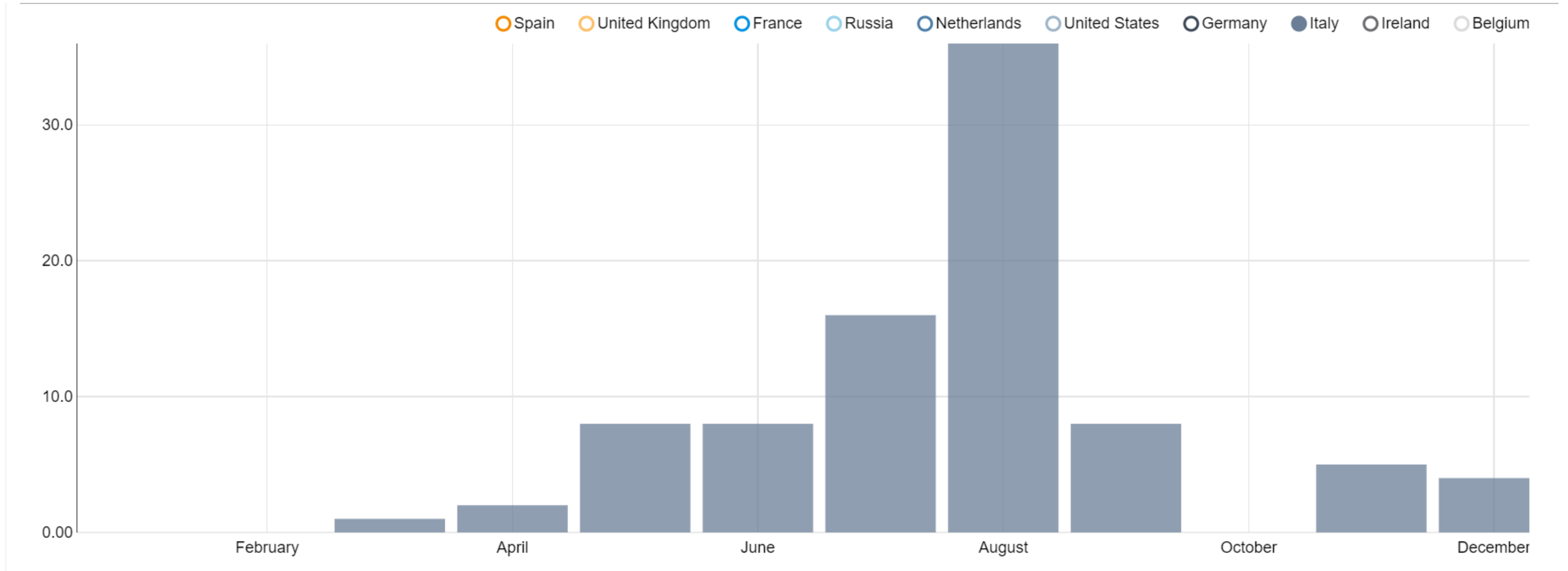
**“YOU CAN’T MANAGE
WHAT YOU DON’T
MEASURE”**

Peter F. Drucker

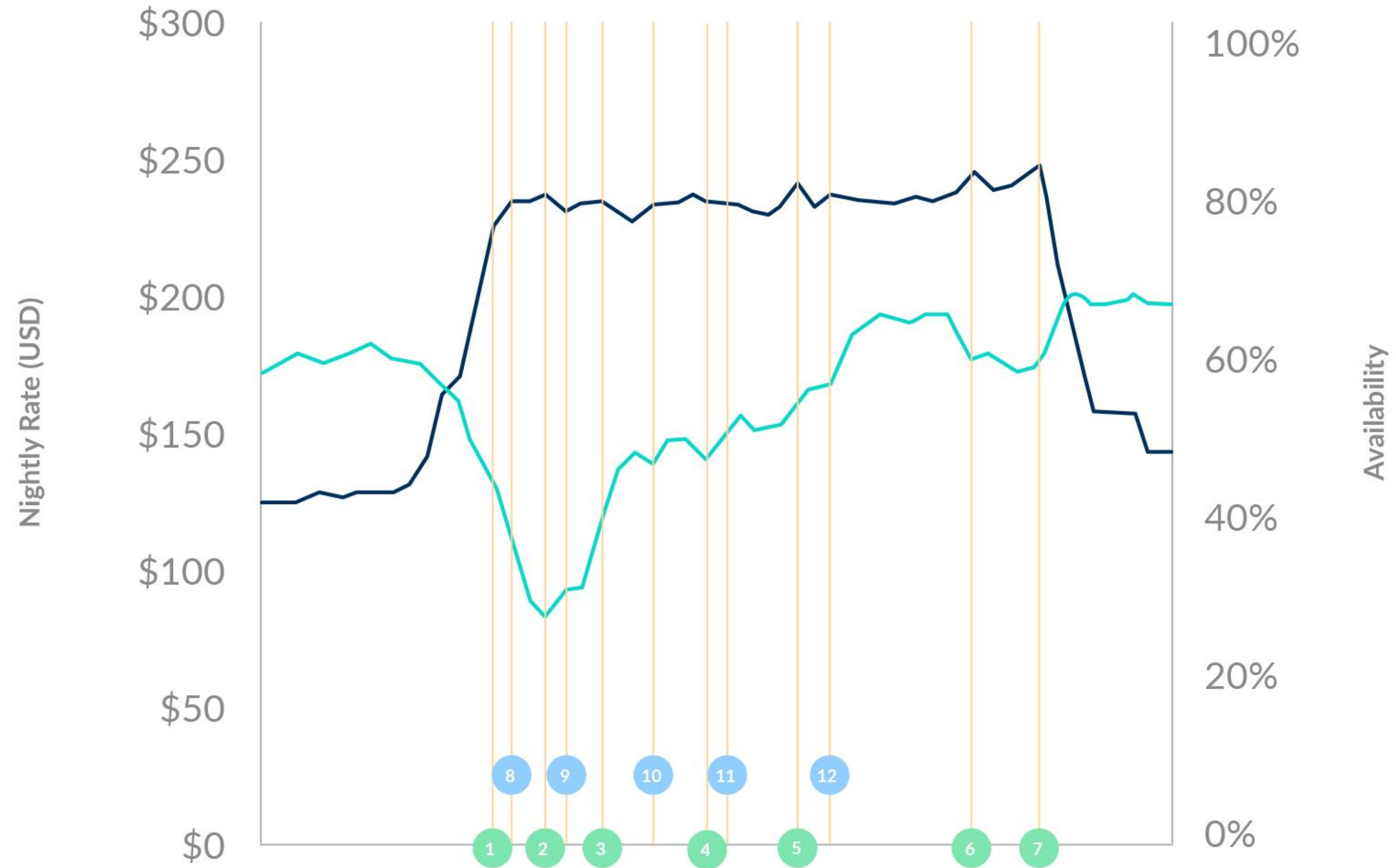
CASE STUDY #1: WHERE ARE THE ITALIANS?



CASE STUDY #1: WHERE ARE THE ITALIANS?



CASE STUDY #2: IS MY DESTINATION PREPARED TO HOST BIG EVENTS?



1 MONTH IN 2018

+3M ATTENDEES

64 EVENTS

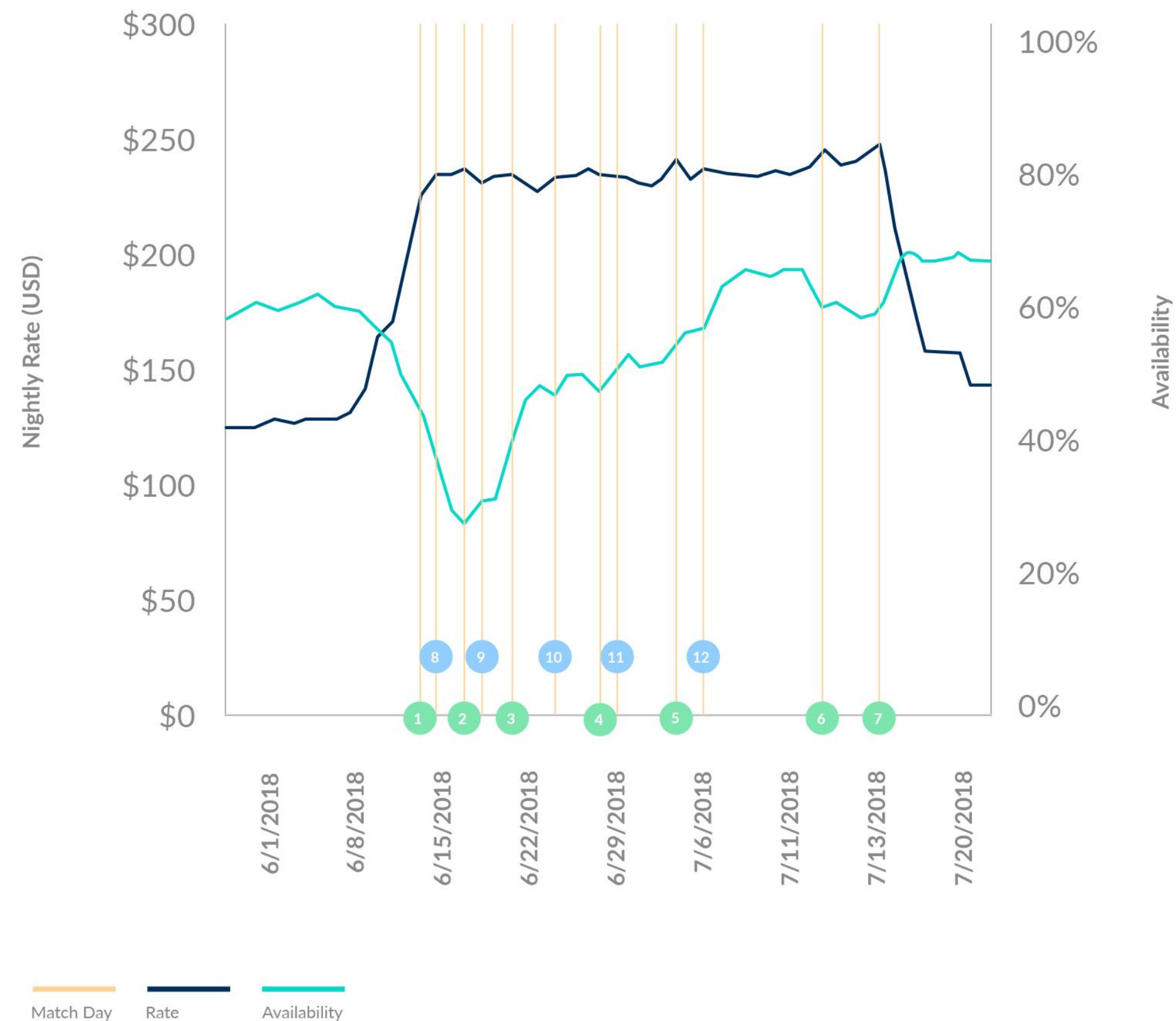
11 CITIES

CASE STUDY #2: IS MY DESTINATION PREPARED TO HOST BIG EVENTS?

FIFA WORLD CUP 2018 - RUSSIA

TRANSPARENT | seetransparent.com

Moscow



► Moscow has 13 matches in 2 stadiums, spanning the entire tournament

MATCHES:

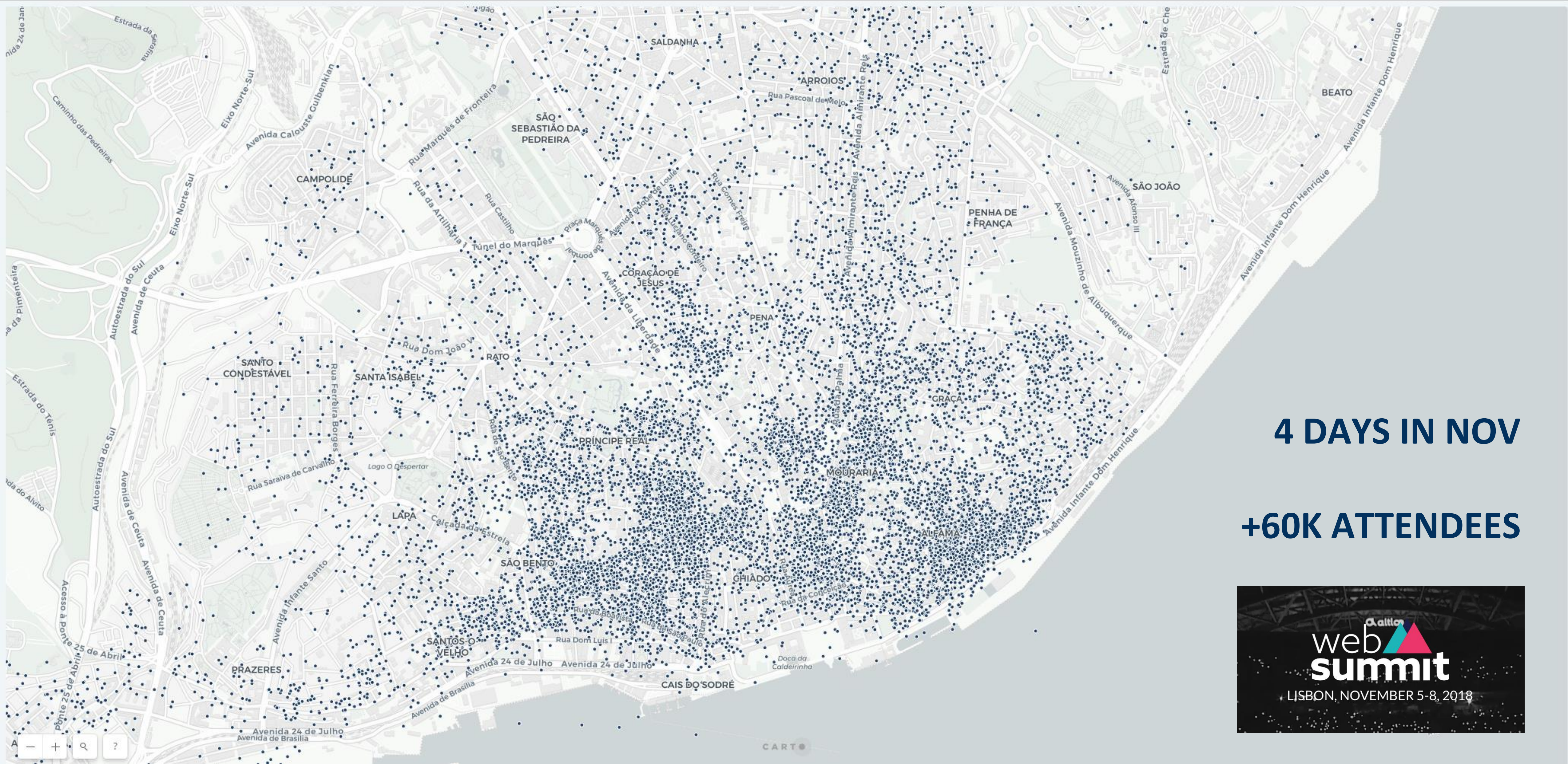
Luzhniki Moscow Stadium

1		RUSSIA	VS	SAUDI ARABIA	
2		GERMANY	VS	MEXICO	
3		PORTUGAL	VS	MOROCCO	
4		DENMARK	VS	FRANCE	
5	ROUND OF 16		6	SEMI-FINAL	
			7	FINAL	

Spartak Moscow Stadium

8		ARGENTINA	VS	ICELAND	
9		POLAND	VS	SENEGAL	
10		BELGIUM	VS	TUNISIA	
11		SERBIA	VS	BRAZIL	
12	ROUND OF 16				

CASE STUDY #3: HOW CAN I USE DATA TO PLAN IN ADVANCE?





Wrapping Up **KEY TAKEAWAYS**



1 in every 4 \$ spent on lodging
is for **Private Accommodations**

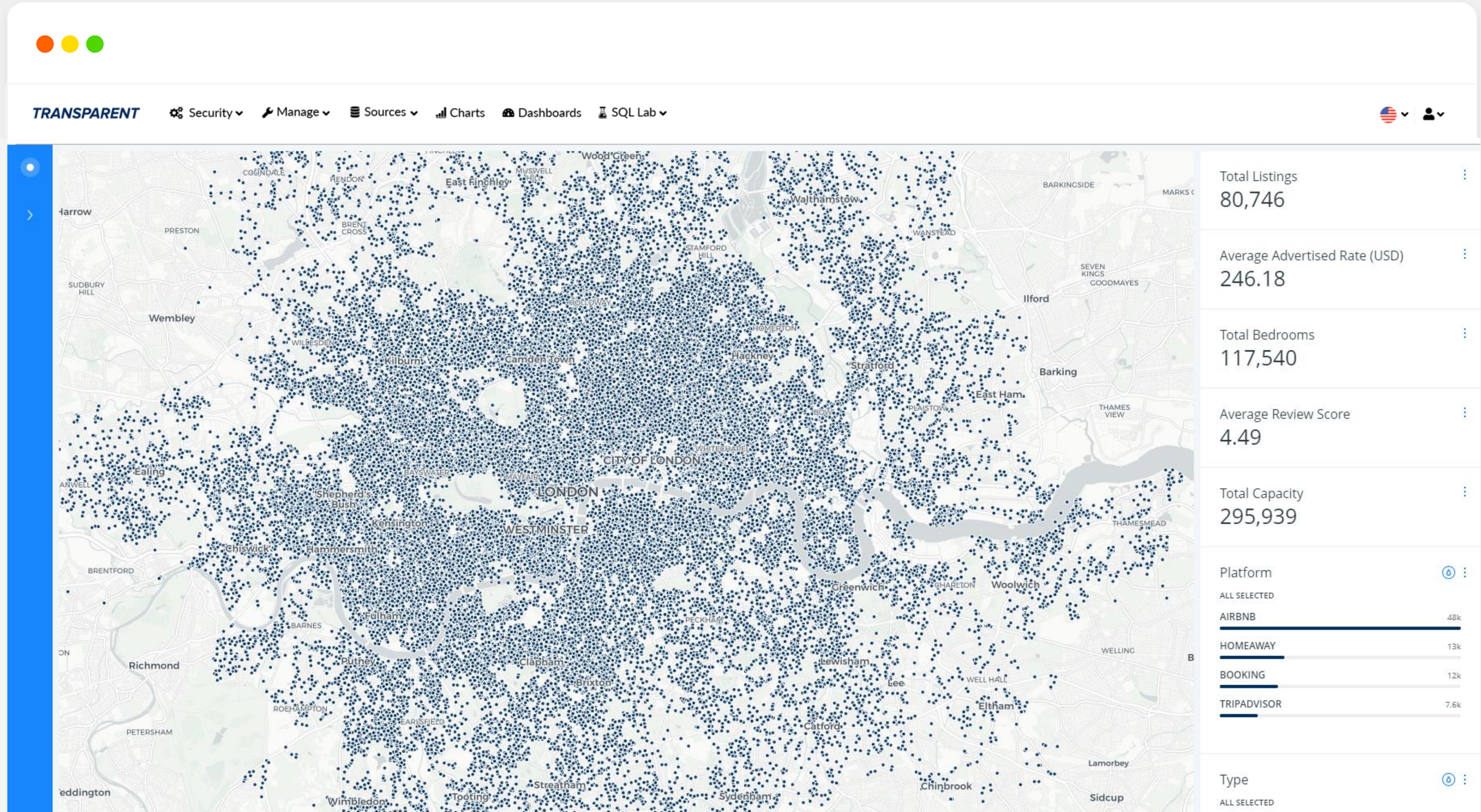




**“YOU CAN’T MANAGE
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TRANSPARENT IS HERE TO HELP



TRANSPARENT

Fernando Dal Re

VP of Marketing & Public Sector Lead

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