

## CHAPTER 3

# Unplanned Expansions: Renting Private Homes to Tourists

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### Introduction

'It is important to recall that most things that are now attractions did not start out that way' (MacCannell 1999, 203).

Tourism within the private realm of a destination, that is, within residential homes via digital sharing economy platforms, is a relatively new phenomenon that has taken many destinations worldwide by surprise. It has created opportunities for new tourism service suppliers while at the same time causing controversy and concern amongst residents and local authorities. Converting the homes of local residents into tourist accommodation has become an extremely common phenomenon in London over the past decade. This trend is driven by a number of internal and external forces, policies and interventions that have developed or occurred since the early years of the twenty-first century. This chapter focuses on the expansion of tourism into London's private realm via digital sharing economy platforms; it explores links with concepts of 'authenticity', 'dedifferentiation', and 'regulated deregulation' and reveals the tensions

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between the social organisation and political governance of sharing economy accommodation, and between mass tourism and housing.

Defining the 'sharing economy' is not an easy task because the sector is not homogenous and definitions are still evolving (Gyimóthy and Dredge 2017). The term 'sharing economy' is used inconsistently and interchangeably with terms for other new 'economies' such as the 'collaborative economy', 'peer-to-peer economy', 'gift economy' and 'hybrid economy'. The 'sharing economy' broadly describes a sector that enables individuals to make their under-utilised assets, time and/or skills available for temporary use by others via digital platforms (Stephany 2015; Woskow 2014). These assets may be gifted, mutually swapped with the same types of asset of the other party, bartered in exchange for other services, or offered for a fee which usually provides some profit for the asset owner and some value for the digital platform that mediated the transaction. The connection between asset owners and potential temporary users is facilitated by digital platforms that match owners and users. Some platforms offer a free service to both parties, some require paid membership and others charge a commission or fee to one, or both, of the parties. Where money is exchanged, the platform usually handles all transactions.

Tourism and the sharing economy seem to be natural partners: visitors to destinations require temporary use of transportation, accommodation, food, guiding and entertainment services. In many destinations these have traditionally been supplied by the commercial sector. However, the opportunities offered by digital platforms to connect private owners of vehicles, spare accommodation capacity in their homes, culinary or entertainment skills, or specific knowledge about the destination, with visitors from around the world have created new tourism supply capacity within destinations, and financial opportunities for asset owners. These are described in the literature as 'micro-entrepreneurs' if the motive is to profit financially from the 'share' (Stephany 2015). Many authors (e.g. Gyimóthy and Dredge 2017; Gyimóthy 2017; Stephany 2015) have debated the contradiction between the concept of 'sharing' and the profit motive; and it is not the objective of this chapter to debate this point. However, it is important to note that distinctions between the sharing economy and the commercial sector are sometimes difficult to distinguish; some sharing economy owners and platforms operate on commercial principles; some are now owned by, or in partnership with, multinational corporations; and some of the world's largest and most powerful online travel agencies (OTAs) own subsidiaries that connect asset owners in destinations with tourists seeking accommodation or other activities there.

One of the most prevalent forms of sharing economy supply is accommodation. Home owners may make a bed, a room, rooms, or their entire home, available at times when it is unoccupied, and advertise it via one or more multinational digital platforms. In London, thousands of private homes are now available for short-term rental.

## The Appeal of Tourism within the Private Realm

Tourist demand for overnight accommodation in the homes of local residents is not a new phenomenon; prior to its promotion to mass markets via digital sharing economy platforms, local homes were already available to niche markets or closed groups. For example, VFR accommodation in local homes depended on personal acquaintance with or introduction to the home owner, while language schools organised stays with host families for their students. The introduction of online sharing economy platforms expanded the scale and scope of the private realm in city destinations by stimulating the growth in supply of local homes, often introducing free-market principles to the supply, and distributing it publicly on a global scale to tourist markets whose choices were previously often limited to the hotel sector – particularly in city destinations.

This expansion of tourist accommodation in the private realm coincided with a shift in tourist demand for more flexible and distinct experiences and the emergence of what are often described as ‘new’ types of tourists. Often rooted in discussions of post-modernism, authenticity, class and society, these new tourists reject settings, products and experiences that are designed specifically for tourists, and seek the ‘real’, ‘genuine’, authentic aspects of a destination (see also the discussion in Chapter 2).

Poon identified a long-term transformation in demand away from ‘mass, standardised and rigidly inflexible’ (Poon 1993, 4) forms of tourism to more independent, flexible and customised tourist experiences. Her ‘new tourists’, identified in the early 1990s, are experienced travellers who are more demanding; they seek control over their tourism experiences, are adventurous and open to new and different activities, and seek individual experiences as evidence of their individuality. New or innovative tourist products and opportunities to experience the ‘unusual’ or ‘different’ within a destination are likely to appeal to such market segments.

Some authors contend that tourists are ultimately seeking authenticity. MacCannell (1999) suggests that tourists seek a deep understanding of society and culture – ‘it is a basic component of their motivation to travel’ (1999, 100) – yet there are challenges in knowing how ‘real’ those experiences are. MacCannell differentiates between the ‘genuine’ and the ‘spurious’ (1999, 55), ‘truth’ and ‘reality’ (1999, 91) ‘authenticity’, (1999, 96) and ‘inauthenticity’ and ‘staged authenticity’ (1999, 98) in relation to tourist settings and suggests that the division between genuine and spurious is marked by the ‘realm of the commercial’ (MacCannell 1999, 155) – he suggests that that ‘genuine’ tourist experiences occur outside commercial settings. This chimes with Robert Maitland’s research in London (see Chapter 2) which found that for some tourist market segments ‘an important element in the appeal of the city is the opportunity to experience and feel a part of everyday life’ (Maitland 2010, 1).

MacCannell (1999) suggests that the 'differentiation' between social groups that pervades 'modern' society, based on distinctions in socio-economic characteristics, sex, sexuality, life-style, race, education, age, occupation, and political affiliations, can be transcended by 'modern mass leisure tourism' (1999:12). '(T)he lure of the local' (Lippard 1997, cited in MacCannell 1999, 199) and 'someone else's local specificity' (MacCannell 1999, 199) can reduce perceptions of differences between groups, transforming the tourist's personality and relationships, their consciousness, and understanding of the world. Richards (2017) links sharing economy accommodation with the potential for tourists to achieve self-actualisation, 'where personalised experiences are generated through empathy between host and guest' (2017, 173).

Maitland (2010) found synergies between some tourists and some residents in London, particularly those seen as the 'cosmopolitan consuming class' (Fainstein et al. 2003, cited in Maitland 2010, 176) or the 'creative classes' (Florida 2002, cited in Maitland 2010, 176); they engage in similar activities in cities and share tastes and preferences. This 'de-differentiation' between tourism consumption and other forms of consumption results in 'dissolving boundaries between tourists, residents and other city users, and between touristic and non-touristic behaviours' (Maitland 2010, 178).

The transformation from 'old' to 'new' tourists is often linked to a desire for new areas/destinations that offer authenticity and a distinct sense of place. MacCannell, drawing on Goffman's division of social settings into front and back, identifies a continuum of six stages to the search for tourist settings that reveal the 'back region'; stage six provides access to 'the kind of social space that motivates touristic consciousness' (1999, 102). Maitland's research into the attraction of new areas of London revealed the growing importance of 'distinctiveness' and 'conviviality' as part of the tourist experience and the desire to escape from the 'tourist bubble' (Maitland 2008). His work revealed the emergence and growth of a new type of tourist in London: those keen to avoid tourist hot-spots within destinations by seeking 'unspoilt', 'genuine' or 'authentic' places and experiences. Research in Islington, in north London, found that for visitors there 'the presence of local people was important ... and even the most mundane features of everyday life were of interest...' (Maitland and Newman 2009, 79). In Bankside, part of the South Bank area, his research with Newman found a desire from tourists to observe 'the presence of people who were not tourists, but Londoners working, shopping and relaxing ... an area in which the "real" city could be experienced' (2009, 82). The private realm within a destination, that is, the lives, and lifestyles of local people might be seen as an extension of this search for authenticity, sense of place and the 'real' city. This helps to explain the popularity of sharing economy accommodation. Staying in private homes broadens the scope of access to the private realm through first-hand exposure to the 'back region' (MacCannell 1999) of a destination and the 'real' lives of residents through access to their homes. Indeed, rental of entire homes, and therefore the absence of the home owner,

may create a sense of borrowing the home owner's lifestyle and participating in the local's experience of a place.

Maitland and Newman (2009) suggest that London's ability to attract a high percentage of repeat visitors puts the city in a strong position to disperse tourists outside the 'tourist bubble': 44 per cent of overseas and 85 per cent of domestic overnight tourists had stayed in London at least twice in the preceding five years, while 81 per cent of domestic day visitors had visited at least ten times (LDA 2007, cited in Maitland and Newman 2009, 72). Repeat visitors' familiarity with the city may make them more amenable to new, less explored areas of the city. Urry and Larsen (2011) suggest that the 'tourist gaze' demands difference and 'out of the ordinary'. This can be achieved through 'seeing unfamiliar aspects of what had previously been thought of as familiar' (2011, 16); by experiencing new areas of a city whose main 'touristified' (Novy 2017) areas have already been visited, echoing MacCannell's claim that 'the quest for authenticity is marked off in stages in the passage from front to back' (1999, 105). Sharing economy accommodation facilitates the rapid expansion of tourism into areas of cities which have not been 'touristified' (Novy 2017), and are not typically associated with tourism, while the experience of staying in a local home might allow visitors to avoid 'the realm of the commercial' (MacCannell 1999, 155).

Maitland and Newman found that tourism policy in London did not account for the growing appeal of the "real" city' (2009, 82) and that often the expansion of tourism into new areas of the city occurred in spite of, rather than because of, tourism policy. However, in 2017, the appeal of the private realm was officially acknowledged by London and Partners' Tourism Vision. The vision is that visitors will be able to unlock the best version of London for them by tailoring their experience to meet their needs (London and Partners 2017, 9). The vision identifies a specific role for home owners in achieving this:

'Encourage the sharing economy's accommodation hosts as well as hotel concierges to act as advocates for their areas, enabling their guests to experience London "like a local". Extend the suite of curated neighbourhood itineraries for visitors'. (London and Partners 2017, 39).

The role of the private realm in London's tourism future is reinforced by the inclusion of Airbnb in the industry consultation on the vision, and in the inclusion in the document of a quotation from Airbnb:

Home sharing provides visitors with an alternative form of accommodation, disperses tourism across the city to the outer boroughs, and financially benefits Londoners. Hosts in London are ambassadors for their city, offering visitors a more authentic and local travel experience in communities beyond the city centre. By hosts sharing their local knowledge and off-the-beaten-track hidden gems, over 4 million

guests to the capital have really felt like they've lived like a local. (James McClure, General Manager, Northern Europe, Airbnb cited in London and Partners 2017, 39).

### Provision of Local Homes to Tourists

The expansion of tourism accommodation within the private realm and its transformation from niche sub-sector to mass market has been driven by digital platforms that link home owners with potential guests. Airbnb is the best-known platform but there are several other significant suppliers (see Table 3.1). These platforms tend to specialise by type of exchange offered: 'commons', 'generative' or 'communitarian' business models are motivated by altruism, solidarity or reciprocity – no money is exchanged and any surplus generated by the platform, for example through advertising or membership revenue, may be re-invested into the platform. 'Extractive' business models are motivated by profit – hosts charge for the short-term rental of their property, and the platforms extract a proportion of the value created by asset-owners and distribute it to themselves (Gyimóthy 2017). Dredge (2017, 76) describes extractive models as 'platform capitalism', an extension of neoliberalism and backed by venture capital allowing such models to expand rapidly.

The importance of these platforms in transforming the accessibility of private homes to tourists should not be underestimated. Urry (1995) stresses the significance of the 'social organisation of travel' (142) and 'organisational innovations' (142) in stimulating major transformations in tourism. Examples cited by Urry (1995) include the voucher system and inclusive tours introduced by Thomas Cook in the mid-nineteenth century, and the post-war development of inclusive tours by air that made international travel accessible to the mass markets in northern Europe. The power of sharing economy platforms rests in their reduction of the risk of staying in a stranger's home through the development of a strong brand, and the creation of trust through the publication of user reviews.

The appeal of city destinations to extractive models is acknowledged by Ferreri and Sanyal (2018) who describe short-term tourism lets as a force that 'straddles the divide between housing and hospitality' (2018, 2) while others suggest that some cities are more likely to develop sharing economy resources. 'The most significant growth of collaborative business phenomena takes place in cities and urban areas with a high concentration of resources (capital, property, skills) and year-round demand with high purchase power' (Gyimóthy and Dredge 2017, 33). Data on the supply of local homes as tourist accommodation in London suggests that communitarian and extractive supply coexist in London, although extractive business models dominate. A snapshot of some of the suppliers of tourist accommodation in local homes in London is shown in Table 3.1.

Despite the distinction in business models, the significance of ‘authenticity’, ‘backstage’ and ‘conviviality’ to all forms of sharing-economy accommodation is evident: the language used to promote the private realm focuses on the local and ‘genuine’, for example, to ‘live like a local’ (Airbnb); ‘stay in distinctive private homes’ (One Fine Stay); ‘unlock the secrets of the city’ through staying in ‘vibrant neighbourhoods filled with personality’ (Under the Doormat); or, to ‘discover amazing people’ (Couchsurfing). Richards (2011) links the sharing

| Site                   | Number of Entire Properties in Greater London   | Source                           | Business Model                                 |
|------------------------|---|----------------------------------|--|
| Couchsurfing           | 146,000 +   | Couchsurfing.com 2017            | Gifting  |
| Airbnb                 | 53,080 active rentals:<br>27,876 entire homes; 24,549 private rooms; 655 shared rooms | Airbnb 2017 cited in AirDNA 2018 | Short-term rental                              |
| Lovehomeswap           | 650+  | Love Home Swap 2017              | Mutual exchange/<br>points accrual or purchase |
| Homelink               | 171   | Homelink 2018                    | Mutual exchange                                |
| Guardian Home Exchange | 171   | Guardian Home Exchange 2018      | Mutual exchange                                |
| Homeaway               | 5,000+  | Homeaway 2018                    | Short-term rental                              |
| Owners Direct          | 3,000+  | Owners Direct 2018               | Short-term rental                              |
| Holiday Lettings       | 6,330   | Holiday Lettings 2018            | Short-term rental                              |
| Housetrip              | 6,423   | Housetrip 2018                   | Short-term rental                              |
| Flip Key               | 7,137   | Flip Key 2018                    | Short-term rental                              |
| Niumba                 | 2,764   | Niumba 2018                      | Short-term rental                              |
| Booking.com            | 4,427   | Booking.com 2018                 | Short-term rental                              |
| Oasis Collections      | 50+   | Oasis Collections 2018           | Short-term rental                              |
| One Fine Stay          | 700+  | One Fine Stay 2018               | Short-term rental                              |
| Under the Doormat      | 80+   | Under the Doormat 2018           | Short-term rental                              |
| Veeve                  | 370   | Veeve 2018                       | Short-term rental                              |

**Table 3.1:** Snapshot of Suppliers of Tourist Accommodation in Local Homes in London. Source: Compiled by the author.

economy to Lengkeek's (1996) 'colonisation of the lifespace' where the private sphere is commodified, and 'the locals seem to willingly collaborate in the colonisation process' (Richards 2011, 181) through the provision of their homes to tourists via the digital platforms. This calls into question the suggestion that the private sphere for tourism exists outside of commercial settings.

To provide some context, figures for March 2016 show that there were approximately 140,000 hotel rooms across London (London and Partners 2016), while AirDNA data shows that around 50 per cent of entire active rentals on Airbnb throughout London are in properties with two or more bedrooms, meaning that the capacity of short-term rental accommodation is significantly greater than the number of properties listed, at almost 42,000 rooms.

At this stage a word of caution should be noted. While broad figures about the number of properties listed on each website are fairly accessible, occupancy data are not readily available. In addition, property listings may be duplicated across a number of sites to reach a wider market; for instance, Under the Doormat lists its properties on Booking.com, Airbnb, Expedia, TripAdvisor and Homeaway, as well as on its own website (Under the Doormat 2017a). Therefore, it is extremely difficult to estimate the number of entire properties available for short-term rental in London or the number of nights that are booked. This creates challenges for destination planners, regulators and marketers.

### Unplanned Expansions

Richards (2011, 180) links the sharing economy with 'interstitial private resources,' that informally fit into the gaps and spaces left by the formal tourism sector. Indeed, the supply of accommodation in local homes represents capacity that is not planned for via a destination's policy and planning framework. Unplanned tourism development is described by Barbaza (1970 cited in Pearce 1989) as 'spontaneous development' that often creates a number of unanticipated short- and long-term negative impacts within the destination concerned. Spontaneous tourism development is often associated with the rampant physical growth of resorts in response to growing demand, before suitable planning measures could be put in place, for example in the Cote D'Azur in southern France in the 1950s and the Costa Brava in Spain in the 1960s (Barbaza 1970 cited in Pearce 1989). It is not normally associated with urban tourism or with global cities. However, although short-term rental of residential property uses existing property and does not necessarily require new physical development, it does provide new and unplanned-for tourism capacity that has a number of unanticipated negative consequences.

The expansion of mass tourism into the private realm bypasses public tourism and urban planning policies which are designed to achieve specific objectives leading to the attainment of a long-term vision (Yan and Morpeth 2015) and which provide a framework of regulations, guidelines, and directives to



inform decisions and activities within destinations. The provision of commercial tourist accommodation within a destination is usually the result of careful planning processes that identify desirable land use in specific zones, specify the desired capacity of tourist accommodation properties or the desirable number of rooms in an area, and the preferred type and quality of accommodation in line with local tourism, planning, economic, and housing policies. The expansion into the private realm adds unplanned capacity that potentially increases tourism capacity within a destination substantially, with no control over its location or subsequent impacts.

The spontaneous expansion of mass tourism into the private realm might be seen as part of a broader neoliberal focus on reducing barriers to growth, competitiveness and attracting investment, which Gyimóthy and Dredge (2017) attribute to government tourism policies. Dredge and Jenkins (2007) stress that policy in general reflects the choices made by governments and their collaborators to balance the interests of interested stakeholders: policy ‘... is inherently political’ (2007, 8). In London, the expansion of tourism supply in the private realm was not explicitly planned for within tourism or urban planning policies, but was enabled by UK government policies that since 2010 have been directed by free-market ideology intended to reduce regulation, reduce government expenditure and promote the growth of the free-market economy (The Conservative Party 2010; The Conservative Party 2015). A key theme of the 2011 Tourism Policy was ‘Better Regulation – Cutting Red Tape’ (Department for Culture, Media and Sport [DCMS] 2011), with the stated aim of the then coalition government to remove ‘unnecessary rules that make it more difficult or expensive for tourism businesses to grow’ (DCMS 2015). The Tourism Action Plan 2016 refers to ‘common sense regulation: examining the scope for deregulation’ to facilitate the growth of tourism businesses (DCMS 2016, 3).

The supply of entire residential properties in London for short-term rental was heavily regulated until 2015. Short-term rental of an entire property for fewer than 90 days to the same tenant had been illegal since 1973 in order to protect housing stock for the benefit of London’s permanent residents (The National Archive 2015). Any residential property that was offered as temporary sleeping accommodation for fewer than 90 days required planning consent for a change of use from residential to temporary sleeping accommodation. Despite this, the supply of short-term rentals had already created problems in central London boroughs. In the preceding fifteen years, City of Westminster’s Planning Enforcement Team investigated 7,362 properties suspected of illegal short-term lets; over 6,000 of these reverted to lawful permanent residential use (BHA n.d.). A number of online platforms already offered entire properties in London for short term rental: in June 2014, more than 6,600 entire properties (either houses or flats) were listed on Airbnb (Ball et al. 2017); One Fine Stay had been promoting and managing entire properties in London since 2009 (One Fine Stay 2017); Veeve since 2011 (Veeve 2018); and Under the Doormat since 2014 (Under the Doormat 2017b). The ability of these companies to

bypass regulations is a product of the challenge for policy makers to keep pace with technological change and the willing supply of homes by micro-entrepreneurs (Guttentag 2017).

Short-term letting in London was addressed specifically in the 2015 Deregulation Act which amended planning laws in London. The objectives of these changes were to: provide opportunities for London residents to rent out their homes; help boost London tourism through the provision of 'competitively-priced accommodation'; reduce the number of properties lying empty or under-used; reform laws which are 'poorly and confusingly enforced across London'; and create similar freedoms and flexibility to the rest of the UK (Department for Communities and Local Government 2015). The revised regulations allowed for '... some common-sense measures to protect local amenity, whilst allowing Londoners who go on holiday to make a bit of extra money by renting out their home whilst they are away' (Ministry of Housing, Communities and Local Government 2015). These measures, in a process of 'regulated deregulation' (Aalbers 2016 cited in Ferreri and Sanyal, 2018, 4), reduced state control over short-term letting in London, but introduced a framework of regulations to which home owners must comply. The Deregulation Act 2015 allowed 'the use as temporary sleeping accommodation of any residential premises in Greater London' if the cumulative total of nights does not exceed ninety in each calendar year and if the provider of the accommodation pays council tax (The National Archive 2015). These regulations apply to entire properties only; hosts are able to let individual private rooms in their homes without any restrictions, although tenancy agreements in rented properties often forbid this. The relaxation of planning laws responded to 'changes in the way people want to use their homes,' and the development of online platforms enabling this (The National Archive 2015).

Illustrating the 'contradictory priorities at different levels of government' (Ferreri and Sanyal 2018, 4), local authorities in London lobbied against the proposed 90-day rule, arguing that a 30-day limit would more closely reflect average annual holiday entitlement and therefore the amount of time that many properties would be unoccupied, and argued that relaxation of short-term letting regulations risked damaging communities through '... anti-social behaviour, fear of crime and loss of neighbourhood character' (London Councils 2014, 3), and the loss of permanent housing stock.

The pressure on housing in London and the need to protect housing stock is arguably greater now than in 1973; between 1997 and 2016, London experienced a 40 per cent growth in jobs and a population increase of 25 per cent but an increase in housing supply of 15 per cent (GLA 2017). This has created inflationary pressure on property values and rents. Private rents have risen five times faster than average earnings; it is estimated that in 2014/15, one third of households renting privately in London spent more than 50 per cent of their income on rent (GLA 2017). The average price of a property in London increased by 47 per cent between June 2011 and June 2015 (The Guardian 2016). In 1990,

approximately 11 per cent of households rented from private landlords; in 2016 this was estimated to be 28 per cent. Home ownership in London has fallen from 57 per cent in 2001 to 50 per cent in 2011 and is expected to fall below 40 per cent by 2025, with significant reduction in the number of owner occupiers under the age of 34 (GLA 2017). While local authorities support opportunities for home owners to earn income from their homes legally, seven London boroughs (Camden, Hammersmith and Fulham, Haringey, Islington, Lewisham, Waltham Forest and City of Westminster) have requested tougher legislation to discourage illegal lettings (BBC News 2017). Four of the boroughs listed above are in the outer areas of London, suggesting that they are anticipating, or have already experienced, an expansion of short-term lets.

National government recommended that in cases of 'egregious breaches of regulation ... the government, local authorities and sharing economy platforms should work together to ensure that all legal requirements are met' (Woskow 2014, 10). Enforcement of the regulations is the responsibility of the local authority for the area concerned but the quote above highlights the role of digital sharing economy platforms in governance of the sector and monitoring compliance with regulations, 'allowing (them) to actively intervene in the very definition of regulation' (Ferreri and Sanyal 2018, 13). The willingness of short-term rental providers to monitor the occupancy of their property listings in London is mixed. In 2016, Airbnb – under pressure from local authorities to prevent illegal lettings – introduced a maximum of 90 days' availability per calendar year for each London property on its site that did not have planning consent for change of use, but this does not prevent a property owner from listing on other sites. BBC London found that Airbnb's competitors had no plans to enforce the 90-day rule (cited in Lynn and Allen 2017). Homeaway provides information on its website advising home owners of the 90-day rule and other regulations relating to short-term lets in London. Trip Advisor Rentals requires homeowners to agree to comply with local laws and regulations (Lynn and Allen 2017). But these sites do not actively monitor availability and bookings.

Property owners avoid scrutiny by listing a single property on several platforms, or re-registering it on Airbnb using different names and descriptions (Lynn and Allen 2017). Inside Airbnb data (cited by Ferreri and Sanyal 2018) showed that in 2015 and 2016, 41.3 per cent of the entire properties in London listed on Airbnb were multiple listings by single hosts. In 2016, the Institute for Public Policy Research found that almost 25 per cent of short-term rental properties breached the 90-day limit (They Work for You 2017). In September 2017, the City of Westminster suspected that almost 1,500 properties breached the 90-day rule (City of Westminster 2017).

Enforcing of the 90-day rule by planning authorities is slow and complex, often relying on notifications from the public, and requiring investment in staff resources to investigate alleged breaches, monitor properties across several online platforms, and visiting properties suspected of breaching the regulations. The City of Westminster employs six full-time planning enforcement officers

who work exclusively on short-term let investigations within the borough (Ferreri and Sanyal 2018). Camden Council has created a 'partial database' based on data from Inside Airbnb to collect evidence to support enforcement and prosecution (Ferreri and Sanyal 2018). The enforcement process itself takes several months. The earliest that a breach of the permitted 90 days can be identified is 1 April, based on 100 per cent occupancy, and further time is required to serve an enforcement notice and process any appeals. The calendar year is almost over by the time a conviction can occur, and the process starts again the following year.

### **Spatial Distribution of Short-term Rentals of Local Homes in London**

Digital sharing economy platforms have a significant role in 'making spaces' (Ferreri and Sanyal 2018, 3) and in expanding the spatial distribution of tourism accommodation capacity further across London to accelerate the emergence of Maitland's 'new areas' for tourism. Table 3.2 shows that while central areas feature heavily in short-term letting provision, new tourist accommodation areas of the city are emerging. To some extent this is influenced by short-term letting companies that offer managed or serviced properties and therefore develop a cluster of properties to create a geographical critical mass that achieves efficiencies in the delivery of the service – a further example of 'organisational innovation' (Urry, 1995). For example, Under the Doormat offers around 30 properties each in the boroughs of Wandsworth, Lambeth and Richmond-upon-Thames in south-west London and occupancy data for 2016 published by My Property Host (cited in Lewis 2016) revealed that their most popular boroughs by occupancy rate are Tower Hamlets and Hackney in the east of the city, followed by Kensington and Chelsea, the City of London, and Islington. As the product becomes more popular for business tourists and families, they expect outer boroughs with larger properties to become more significant (My Property Host 2016 cited in Lewis 2016).

Each London Borough has its own elected council and is responsible for planning, housing and other services. Quattrone et al. (2016) conducted longitudinal research into the spatial distribution of Airbnb in London between 2012 and 2015. They found that the penetration of Airbnb listings in different areas of London was influenced by proximity to the centre, accessibility by public transport, the socio-economic profile of the area's residents, the number of attractions, the proportion of rental properties compared to owned, and the youth and tech-savviness of its residents. They identified a number of stages in the evolution of Airbnb property listings in London over that time. In the early stages, geography was the most significant determinant with a concentration of listings in areas close to the centre. These areas contained a high proportion of young and ethnically-diverse residents who were technologically literate

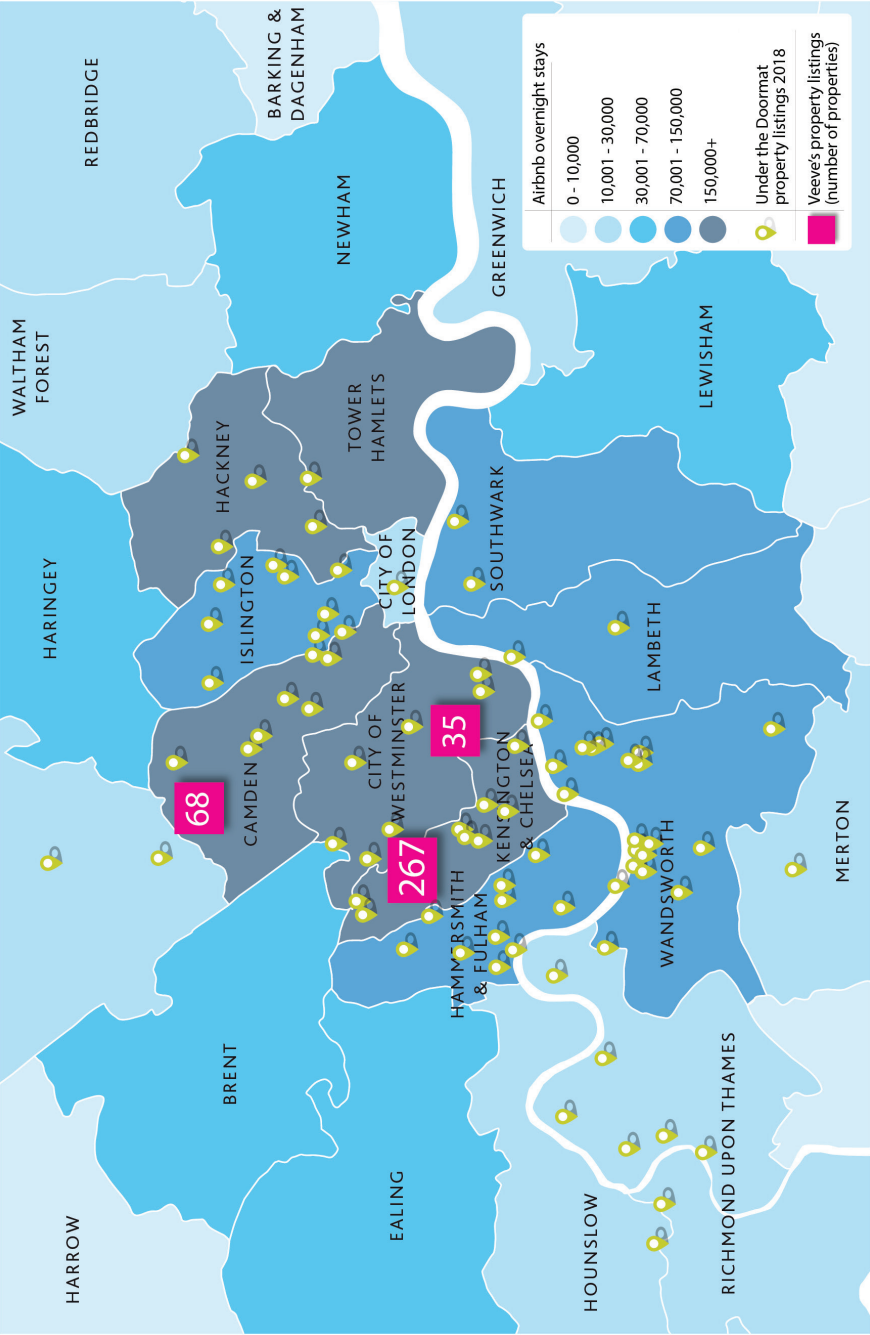


Figure 3.1: The Spatial Distribution of London's Sharing Economy Accommodation Sector (© Mason Edwards).

and early-adopters of hosting. In 2013, Airbnb began to penetrate areas further away from the centre, with less tech-savvy residents, more home owners, and more residents on lower incomes. This trend continued into 2014 and 2015. Their findings suggest that the strongest predictors of areas with high Airbnb listings are the number of rental properties and residents with lower incomes; this suggests that late-adopting hosts joined the platform to boost their own incomes.

Proximity to the centre and technological prowess became less significant over time. In addition, the authors found that private rooms listed on Airbnb tended to be offered in areas with highly-educated non-UK born renters while entire homes tended to be listed in areas with high home ownership and high-value properties. This echoes Richards' (2017) suggestion that many individuals involved in the sharing economy are members of the ex-pat community, perhaps with in-depth understanding of the needs of source markets, or members of the 'cosmopolitan consuming class', perhaps whose homes match the needs of the similar groups visiting as tourists.

Listings of properties do not provide evidence of occupancy. Colliers International and Hotelschool The Hague (2016) mapped the occupancy rates of Airbnb in each London borough and found that over half of overnight stays were concentrated in the five boroughs of City of Westminster, Tower Hamlets, Camden, Kensington and Chelsea and Hackney – adding more tourist accommodation capacity in these boroughs and strengthening existing tourist enclaves (Richards 2017). However, outer boroughs to the north, south and west of London also achieved over 30,000 overnight stays in 2015 (Colliers International and Hotelschool The Hague 2016), 'pioneer(ing) new tourist nodes which are more integrated into local communities' (Richards, 2011, 181).

The dispersal away from central London that is being facilitated by sharing economy accommodation supply has long been an objective of tourism policies, strategies and action plans. Maitland and Newman (2009) highlight this priority in the London Development Agency's 2002, 2004 and 2006 documents and this has continued even after the abolition of the LDA in 2010. Subsequent London Plans (Mayor of London 2004; 2008; 2011) mention this, and the objective is repeated by the Greater London Authority's 2017 London Plan which aims to 'promote tourism across the whole of the city, including outside central London' (GLA 2017, 262).

In order to accommodate visitors outside central London, an increase in accommodation supply is necessary. The London Plan 2017 estimates that, by 2041, 58,000 additional bedrooms of serviced accommodation will be required to meet forecasted demand. The plan recognises the role of short-term rentals in providing more choice for visitors, and in expanding serviced accommodation provision outside the centre in areas that have good transport connections to the centre as long as residential housing is not compromised (Mayor of London 2017). However, the long enforcement process and the absence of reliable data create challenges in protecting housing stock and in enforcing planning regulations.

## Accommodation in the Private Realm Becomes Mainstream

Guttentag (2015) locates the sharing economy in the context of Christensen's disruptive innovation theory (1995 cited in Guttentag 2015, 1194). The theory describes the process by which a new type of product eventually transforms the market by disrupting existing suppliers and becoming mainstream. At first the disruptive product 'will generally underperform with regards to the prevailing products' key performance attributes' (Guttentag 2015, 1194) and instead offers other benefits including lower prices or convenience. Consequently, the market for the disruptive product is small initially with limited profitability and is ignored by leading companies. However, improvements to the disruptive product increase its appeal – and therefore its market share and profitability – and it becomes mainstream and a competitive threat to leading companies. Short-term rentals and continuing innovation in that sector seem to be demonstrating the disruptive innovation model in tourism.

A recurring theme in the literature is the economic shift afforded by sharing economy platforms away from 'the traditional tourism system' (Richards 2017, 174), the ability of tourists to 'circumvent the tourism supply chain' (2017, 169) and for homeowners to 'effortlessly enter the tourism accommodation sector and compete with traditional accommodation enterprises for guests from around the world' (Novy 2015, 1195). In fact, recent moves by the 'traditional' tourism supply chain to incorporate sharing economy accommodation and the private sphere into its own offer demonstrate a response to the competitive threat of sharing economy platforms. Several of the brands listed in Table 3.1 are owned by multinational OTAs that dominate the distribution of tourism accommodation and other tourist services within major markets globally: Homeaway and Owners Direct are part of Expedia, Inc; Holiday Lettings, Housetrip, Niumba and Flipkey are owned by Trip Advisor LLC; and Booking.com is part of Booking Holdings Inc. These companies are not sharing economy businesses but mainstream distribution channels of tourist accommodation.

Similarly, some global hotel companies are responding to the tourist appeal of local homes by expanding their accommodation offer and tapping into the growing demand for short-term home rental. Onefinestay.com, established in London in 2009 and offering more than 700 entire London homes, was acquired by one of the largest hotel companies in the world, Accor Hotels, in 2016 (One Fine Stay 2017). Oasis Collections, with over fifty properties in London, now operates under Hyatt's 'soft brand' The Unbound Collection (Oasis Collections 2018).

Companies that traditionally existed outside of the habitual tourism supply chain have also entered the sharing economy arena, representing 'the encroachment of professional letting into the short-term let platform economy' (Ferreri and Sanyal 2018, 9). Many of the properties listed on sharing economy and OTA platforms are managed by third party companies who handle promotion,



reservations, cleaning and key handling. In such cases, home owner and guest do not need to interact at all. Some offer interior design services and further 'stage' the property through the provision of hotel-standard linen, toiletries and a welcome service. The appeal of these services to home owners in London has given rise to professional services offering property management and hospitality skills: for example Airtorted, Air Agents, Hostmaker, My Property Host, and CityRelay and Lavanda manage short-term lets on behalf of hosts by organising property listing, revenue management, communication with guests, housekeeping and keys and offer '... an end-to-end solution, ensuring you get maximum value from your property without having to lift a finger' (Lavanda 2018). Private sector landlords, property specialists and estate agents, and property speculators have also recognised the potential of short-term lets to tourists: some London estate agencies have expanded into short-term rentals by offering management services to private-sector landlords (Kinleigh, Folkard and Hayward, 2018) while Lavanda also works with estate agents to maximise income from vacant properties awaiting sale or rental (Lavanda 2018). Private sector landlords' letting strategies have been transformed by sharing economy opportunities where higher yielding short-term rentals are substituting long-term rentals to local residents (Simcock 2017). Valuation Office data (cited in *They Work For You* 2017) shows that short-term rentals commonly yield weekly rates three times higher than long-term rentals in the same property: Ferreri and Sanyal (2018) found a difference per day for a one-bedroom flat of between £49 to £150 in Islington and £67 to £178 per day in Kensington and Chelsea.

Integration of the accommodation sharing economy sector into the mainstream has been reinforced by the establishment in 2017 in the UK of a trade association – the Short-Term Accommodation Association. Its role is to represent the interests of the short-term lettings sector and to work with 'all stakeholders towards a stable and supportive regulatory environment' (STAA n.d.a), further echoing Dredge's notion of 'regulatory capture' (2017, 83). The STAA Code of Conduct includes four key principles: protecting hosts and guests, supporting enforcement, maintaining residential amenity, and supporting local business. The code pledges that members will 'always promote responsible hosting and compliance with local regulations' (STAA n.d.b). While STAA requires members to remove listings that breach regulations, their code specifies such decisions depend on local authority notification. The missing link in this process is local authority access to easily obtainable evidence.

## Conclusions

From a tourism perspective, the growth in supply of short-term rentals in London is reminiscent of spontaneous tourism development that has previously caused a range of long-term problems in some coastal destinations of southern



Europe. Unplanned accommodation capacity circumvents existing urban and tourism planning policies. The lack of transparency about capacity, availability and occupancy of short-term rentals prevents local authorities from managing enforcement of illegal lettings, and limits the effectiveness of destination management and marketing. The political will at a national level to embrace business, entrepreneurship, and innovation has enabled ‘disruptors’ to accelerate their expansion into London, while the process of ‘regulated deregulation’ (Ferrerri and Sanyal 2018) has not provided the resources for local authorities to enforce rules and seems to have facilitated the transformation of local homes into tourist accommodation. This is no longer a niche sector serving more discerning clients, but a mass market, and one that is affecting the availability and affordability of residential housing in London.

De-differentiation is a common theme in London’s experience of the sharing economy accommodation sector. Distinctions are being eroded on a number of levels: between the everyday and the ‘tourist bubble’, between ‘staged’ and ‘authentic’ experiences, between the private realm and global businesses, and between tourism and residential property sectors. In ‘touristified’ areas in the centre, existing accommodation supply, mainly in hotels, is supplemented by thousands of residential properties, reinforcing the centre as a tourist enclave, while clusters of serviced homes are facilitating the expansion of tourism into ‘back regions’ of the city, supported by tourism policy and potentially creating new ‘tourist bubbles’.

Accommodation which is promoted as offering an ‘authentic’ and local experience may be professionally managed and ‘staged’ to more closely meet the needs of the ‘cosmopolitan consuming classes’ tourist market it serves – removing any personal contact between the home owner and guest and eroding the distinction between the commercial accommodation sector and the sharing economy.

The response by the ‘traditional’ tourism sector to the growth of the sharing economy has been to incorporate short-term letting into its own offer. The effect has been to enable the global distribution of local homes in London by massive OTAs or by global hotel companies. This is driving the growth and territorial expansion of the tourism industry in London.

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