



COLLABORATIVE ECONOMY AND TOURISM:

Latest news on STR market and regulatory developments across Europe

WEBINAR | 25th SEPTEMBER 2025

POWERED BY:

TOPOSOLOGY

PLACE MAKING & MARKETING AGENCY





Barry Rogers

Director of Destination Strategy

TOPOSOLOGY
PLACE MAKING & MARKETING AGENCY



TODAY'S AGENDA

1. NEWS & UPDATES

- Challenging Airbnb's claims on overtourism and STR regulations (June 2025)

2. KEY TRENDS IN SUPPLY & DEMAND

- STR services and global trends
- STR services and their performance in 2025: Focus on Europe
- Recent initiatives by major platforms

3. REGULATORY UPDATE

- North America & Europe

4. KEY TAKEAWAYS

5. Q&As

Short-term Rentals, Platforms & Local Communities



NEWS &
UPDATES

Challenging Airbnb's claims on overtourism and STR regulations (June 2015)



Challenging Airbnb's claims on overtourism and STR regulations



Amid protests against overtourism in Southern Europe, Airbnb released a report urging city leaders to focus on hotels as the main culprit. **However, the report is undermined by clear bias and methodological flaws**—omitting or skewing data, using inappropriate comparisons, relying on unverified internal figures, and selectively citing anecdotal evidence.



Overtourism in the EU

What data tells us about the overwhelming impact of hotels on overtourism in the EU



Source: [Airbnb](#), June 2025

Challenging Airbnb's claims on overtourism and STR regulations

We have recently shown that Airbnb's report used Eurostat data to provide a distorted image of the hotel sector's role in overtourism, **while deliberately downplaying the growing impact of STRs.**

JULY 2025

HOTREC Position Paper & Press Pack



Response to Airbnb's Report on Overtourism



Photo Source: [Euronews](#)

Source: HOTREC Position Paper & Press Pack (July 2025)

Challenging Airbnb's claims on overtourism and STR regulations



Claim No. 1: The report states that “*STRs represent a small fraction of the tourism ecosystem in the EU.*” The point is that all STR tourist nights - available among Airbnb, Booking, Expedia and Tripadvisor - represented just 22% of all tourist nights reported by Eurostat in 2024.



Hotels and other similar accommodations account for more than

5 times

as many guest nights as **Airbnb** in the EU's top ten cities.

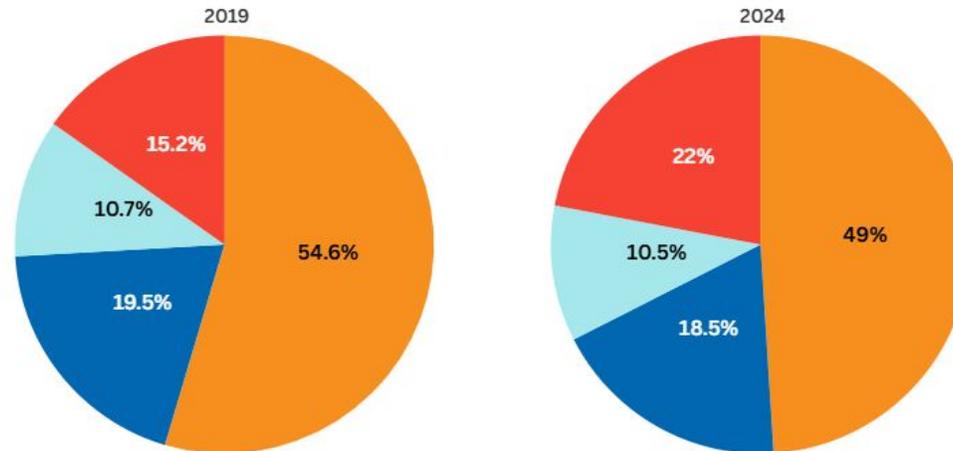
Source: [Airbnb](#), June 2025

Challenging Airbnb's claims on overtourism and STR regulations

Response: The report fails to acknowledge the profound shift in the tourism landscape between 2019 and 2024. **The share of STR nights considerably increased, growing from 15.2% in 2019 to 22% in 2024, while the share of the hotel sector (I551) declined by approximately 6 percentage points.**

Graph 1.1 % Nights Spent at Tourist Accommodation Establishments in 2019 & 2024 (EU27)

- (I551) hotels and similar establishments
- (I552) holiday and short-stay accommodations
- (I553) camping grounds, recreational vehicle parks and trailer parks
- Short-stay accommodation offered via collaborative economy platforms



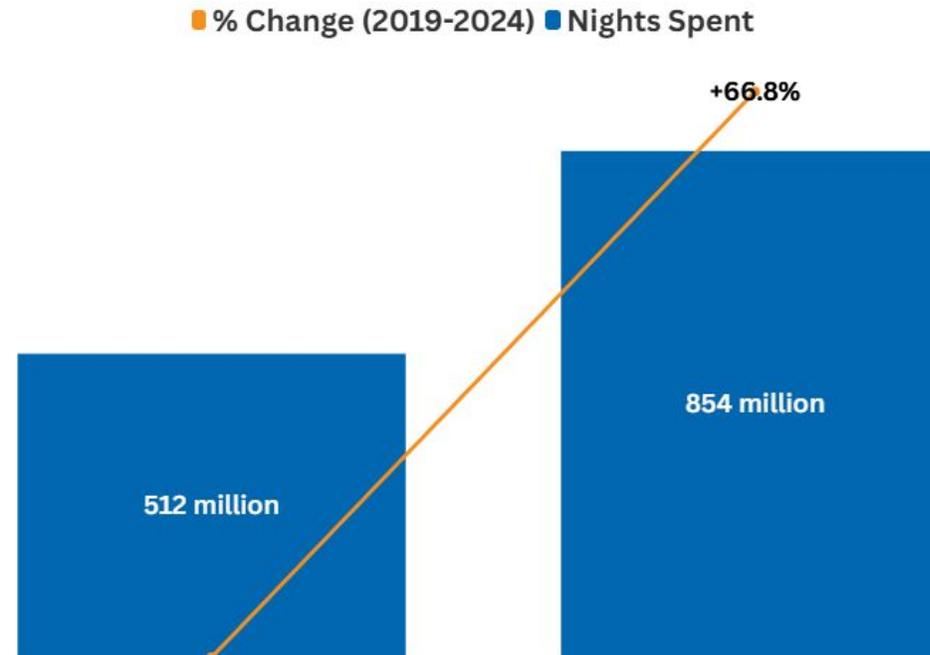
Source: Eurostat
Graph made in Flourish

Source: HOTREC Position Paper & Press Pack (July 2025)

Challenging Airbnb's claims on overtourism and STR regulations

Response: Crucially, nights spent in STRs offered via the four platforms demonstrated robust growth, surging by +66.8% from 2019 to 2024. **This highlights STRs as the most rapidly expanding segment of the EU's tourism ecosystem** rather than merely a small fraction against Airbnb's claims.

Graph 1.2 Nights Spent at Short-Stay Accommodation Offered via Collaborative Economy Platforms in 2019 & 2024 (EU27)



Source: Eurostat
Graph made in Flourish

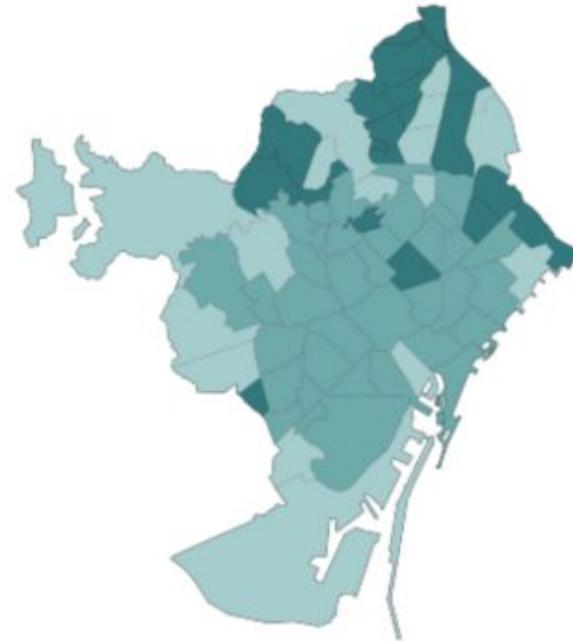
Source: HOTREC Position Paper & Press Pack (July 2025)

Challenging Airbnb's claims on overtourism and STR regulations



Claim No. 2: Airbnb argues that STRs can help alleviate common concerns regarding overtourism (e.g. by facilitating visitor dispersal). However, **the report fails to acknowledge the direct link between the surge in STR activity and the increasing overtourism problems in key cities in 2025.**

Heatmap of Airbnb short-term rentals relative to hotels (or other similar accommodations)



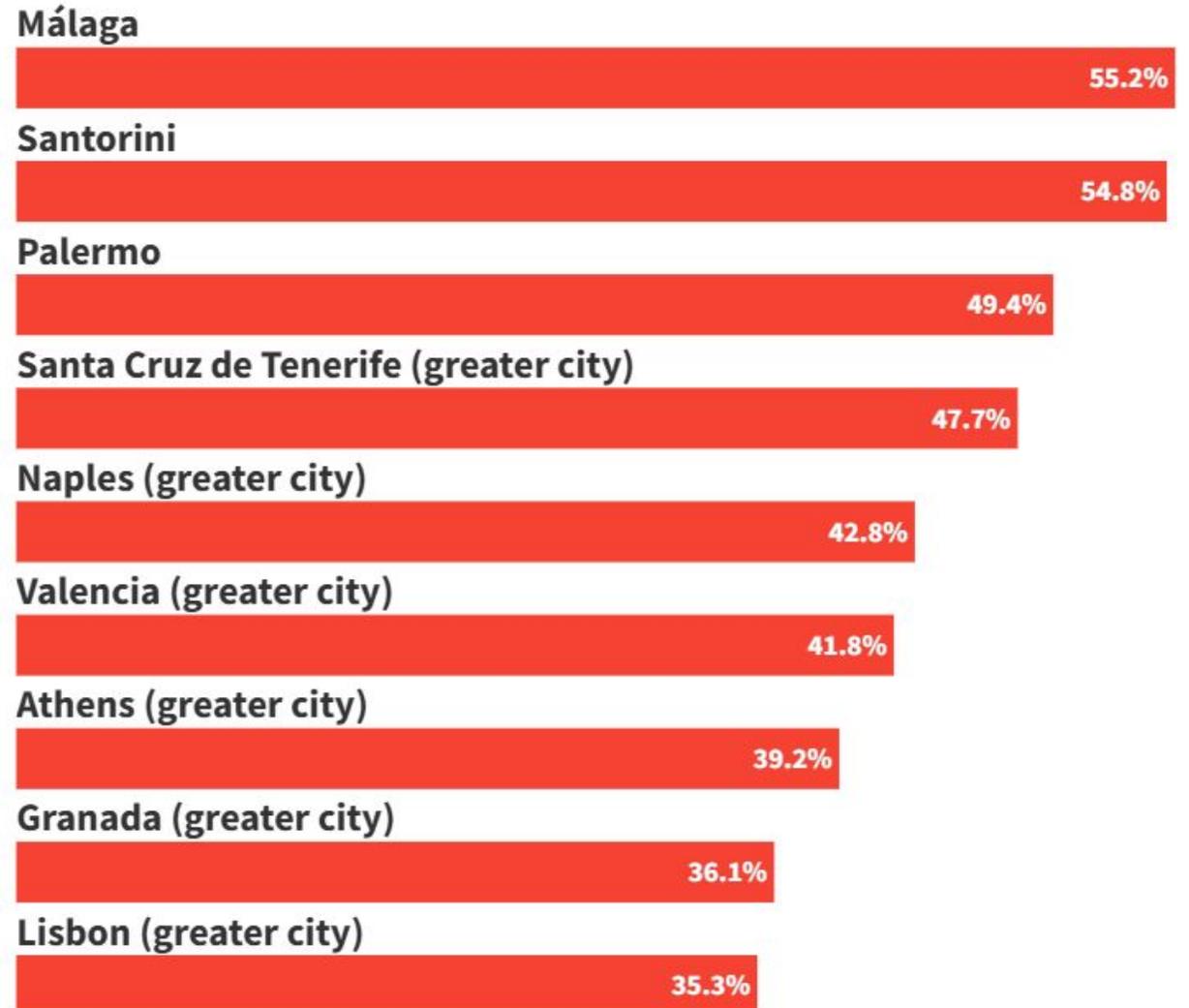
Source: [Airbnb](#), June 2025

Challenging Airbnb's claims on overtourism and STR regulations

Response: The disproportionate impact of STRs in highly affected urban areas is validated through analysing Eurostat data from four platforms.

In 2023, there were at least nine destinations nights spent in STRs exceeded 30% of total nights, four cities where with 40% shares and the exceptional cases of Málaga and Santorini with >50%.

Across all these cities, STR activity far surpassed the EU27 average of 19.7% for nights spent in STRs.



Challenging Airbnb's claims on overtourism and STR regulations



Response: The trajectory of STR nights highlights that STR growth is increasingly concentrated in large metropolitan areas and major destinations. Between 2019 and 2024, Paris added nearly 10 million nights, while Mediterranean destinations recorded some of the steepest increases: Rome (+5.5m), Milan (+4.5m), Madrid (+3.8m), Athens (+3.4m) Malaga (+3.15m) and Nice (+3m).

TIME	2019	2023	2024
CITIES			
Paris (greater city)	13 522 880	19 293 471	23 499 910
Roma	10 130 705	12 540 949	15 662 954
Barcelona (greater city)	11 028 439	10 922 485	12 481 279
Madrid (greater city)	7 904 312	9 478 604	11 789 929
Lisboa (greater city)	10 235 447	10 518 856	11 312 571
Milano (greater city)	4 437 525	6 990 754	8 891 724
Budapest (greater city)	6 818 825	6 720 513	8 207 665
Athina (greater city)	4 553 735	6 519 531	7 994 998
Nice (greater city)	4 913 753	6 749 199	7 891 018
Porto (greater city)	5 170 837	6 398 408	7 008 606
Wien (greater city)	5 056 658	5 783 462	6 626 016
Málaga	3 344 288	5 216 659	6 580 562

Source: Eurostat, September 2025

Challenging Airbnb's claims on overtourism and STR regulations



Claim No. 3: Airbnb says that restrictions on STRs have not solved overtourism issues, **yet no details are presented on the challenges destination authorities face in enforcing STR regulations**, mainly due to the consistent unwillingness of platforms to facilitate data sharing pertinent to regulatory compliance and cooperate in the delisting of non-compliant properties.



Overtourism in the EU

What data tells us about the overwhelming impact of hotels on overtourism in the EU



Source: [Airbnb](#), June 2025

Challenging Airbnb's claims on overtourism and STR regulations



Response: The report attempts to divert attention from national efforts to curb the negative impacts of unregulated STRs. Spain has recently moved decisively – enforcing mandatory registration and pursuing illegal listings – while Italy is steadily advancing work on its regulatory framework.

Key National Short-Term Rental Laws in Italy (2024–2025)

CIN (National Code)	Mandatory code for every STR. Must be shown on listings and outside the property. Issued via Ministry of Tourism portal.	Sept 1, 2024
Taxation Update	Cedolare Secca: 21% on 1st property, 26% on 2nd–4th. Platforms will act as tax intermediaries and CIN must be included in returns.	Jan 1, 2025
Commercial Classification	More than 3 properties = commercial operator. Must register with Chamber of Commerce, apply VAT, and meet business standards.	Jan 1, 2025
Safety Requirements	Gas & CO detectors and fire extinguishers are mandatory. Must maintain documentation.	Nov 2024

Challenging Airbnb's claims on overtourism and STR regulations

We can assume this debate will continue intensively over the next few months, given the announcement by the EU commissioner, Ursula von der Leyen, on September 10, regarding a **new regulatory initiative for controlling the impact of short-term rentals on housing shortages.**



*“We need to revise our State aid rules to enable housing support measures. We need to make it much easier to build new houses and student residences. **And we will also propose a legal initiative on short-term rentals to tackle the remaining issues.**”*

Challenging Airbnb's claims on overtourism and STR regulations



Response: On September 22, the European Parliament published an in-depth analysis discussing:

IN-DEPTH ANALYSIS

Requested by the HOUS Special Committee



- STR impacts on access to affordable housing in the EU.
- The variety of STR regulations and the challenges to their implementation.
- The role that EU legislation plays in influencing the regulation of both STRs and the digital platforms.

The regulatory aspects of short-term rentals in the EU



Challenging Airbnb's claims on overtourism and STR regulations



Response: Policy recommendations vary, but primarily focus on the European Parliament urging the European Commission to interpret the Services Directive to support housing affordability as a public interest objective:

- Closely monitoring the implementation of new data regulations for STRs
- Enhancing the cross-border enforcement of legal actions against platforms
- Advocating for future legislation that increases platform accountability.

IN-DEPTH ANALYSIS

Requested by the HOUS Special Committee



The regulatory
aspects of short-term
rentals in the EU



Short-term Rentals & Platforms



KEY TRENDS IN SUPPLY AND DEMAND

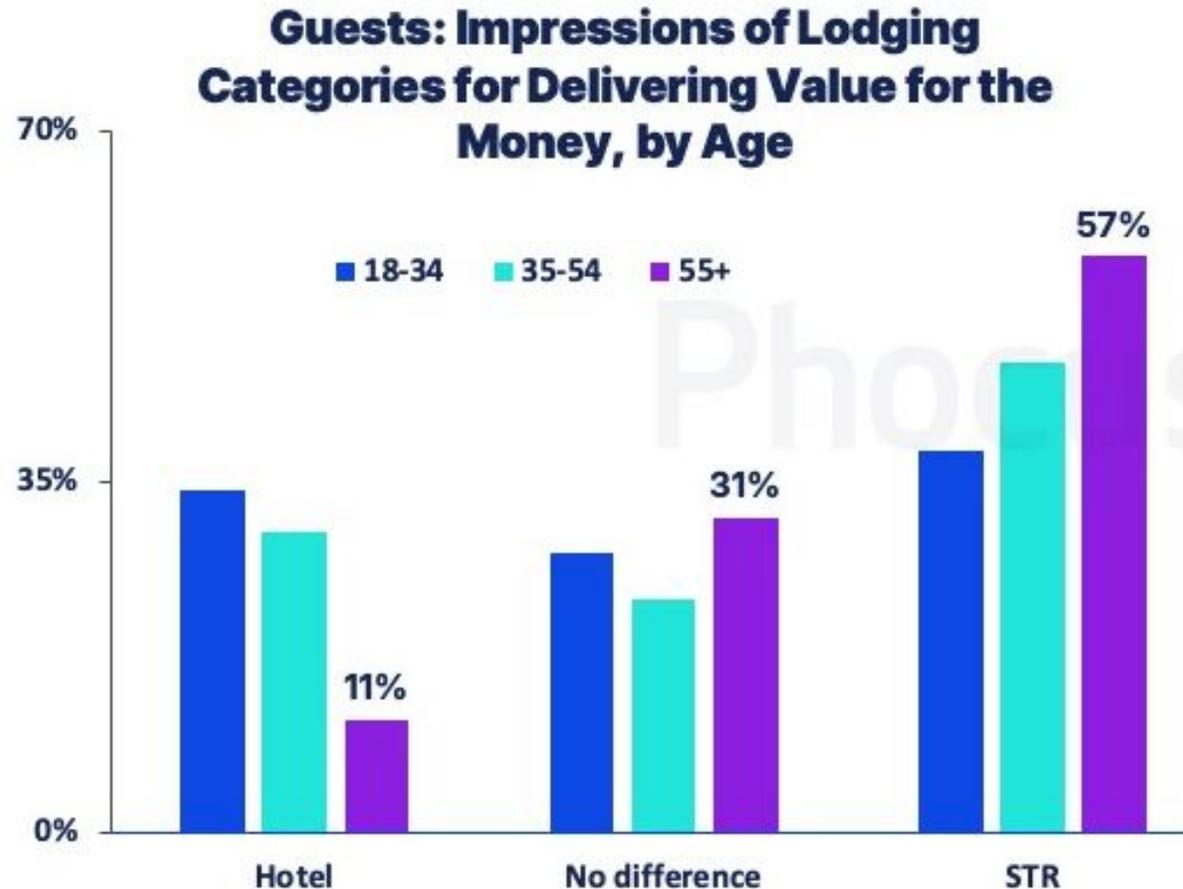
STR services and their recent trends



Global overview

STR services and their recent trends: Global overview

“Silver” travelers (55+) are an expanding STR niche. Phocuswright data shows 57% view STRs as offering better value for money than other accommodation types.



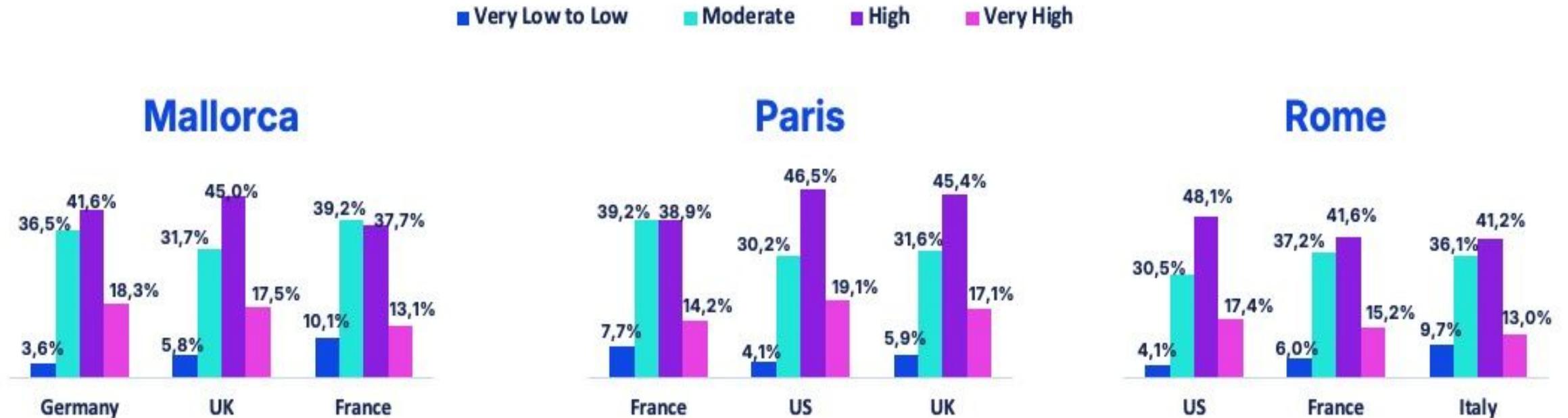
Source: [Mabrian](#), May 2025

STR services and their recent trends: Global overview

STRs attract affluent travelers too. Mabrian data shows affluent travelers make up 45%–65% of market share across key source markets.

STR Users' Profile. Share per Income Level and Key Source Markets.

Full Year 2024



Source: [Mabrian](#), May 2025



STR services and their recent performance



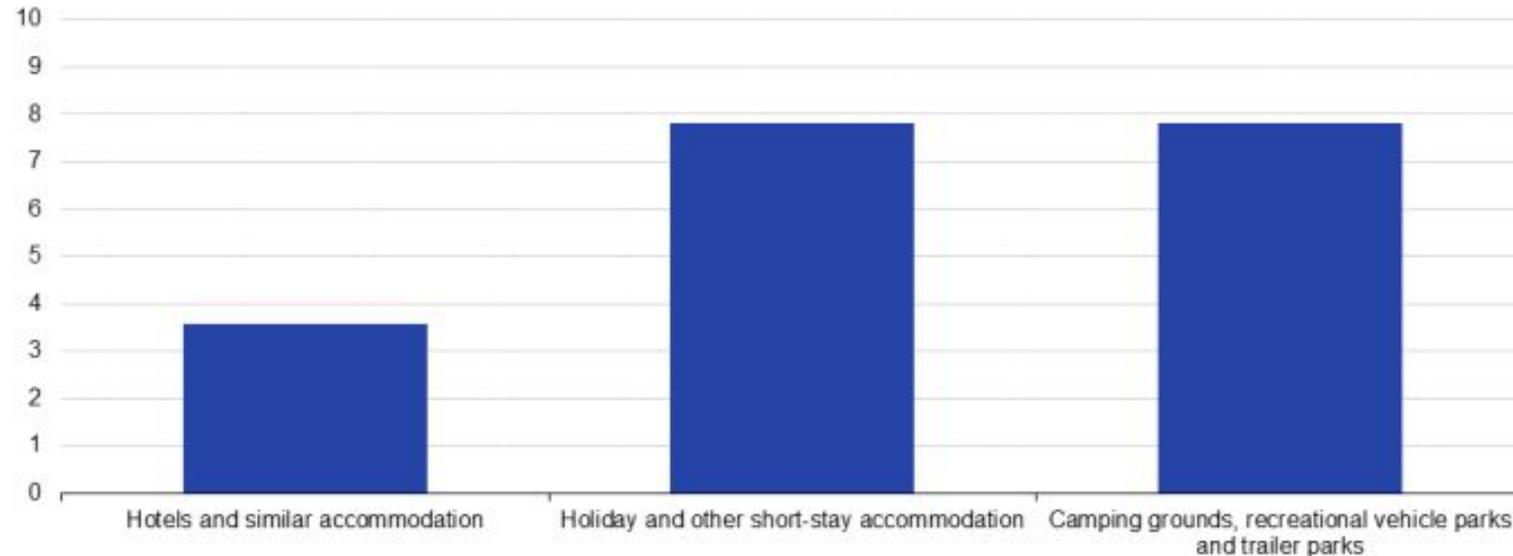
Focus on Europe

STR services and their recent trends: Global overview



In Q2 2025, nights spent at all tourist accommodation types increased compared to the same period in 2024. While hotels and similar accommodation, which make up 62.9% of the market, saw a 3.6% increase to 519.5 million nights, **the holiday and other short-stay accommodation sector (23% of the market) experienced the highest most significant growth rate (+7.8%).**

Nights spent in tourist accommodation establishments, by type of accommodation, Q2 2025 compared with Q2 2024, EU (% change)

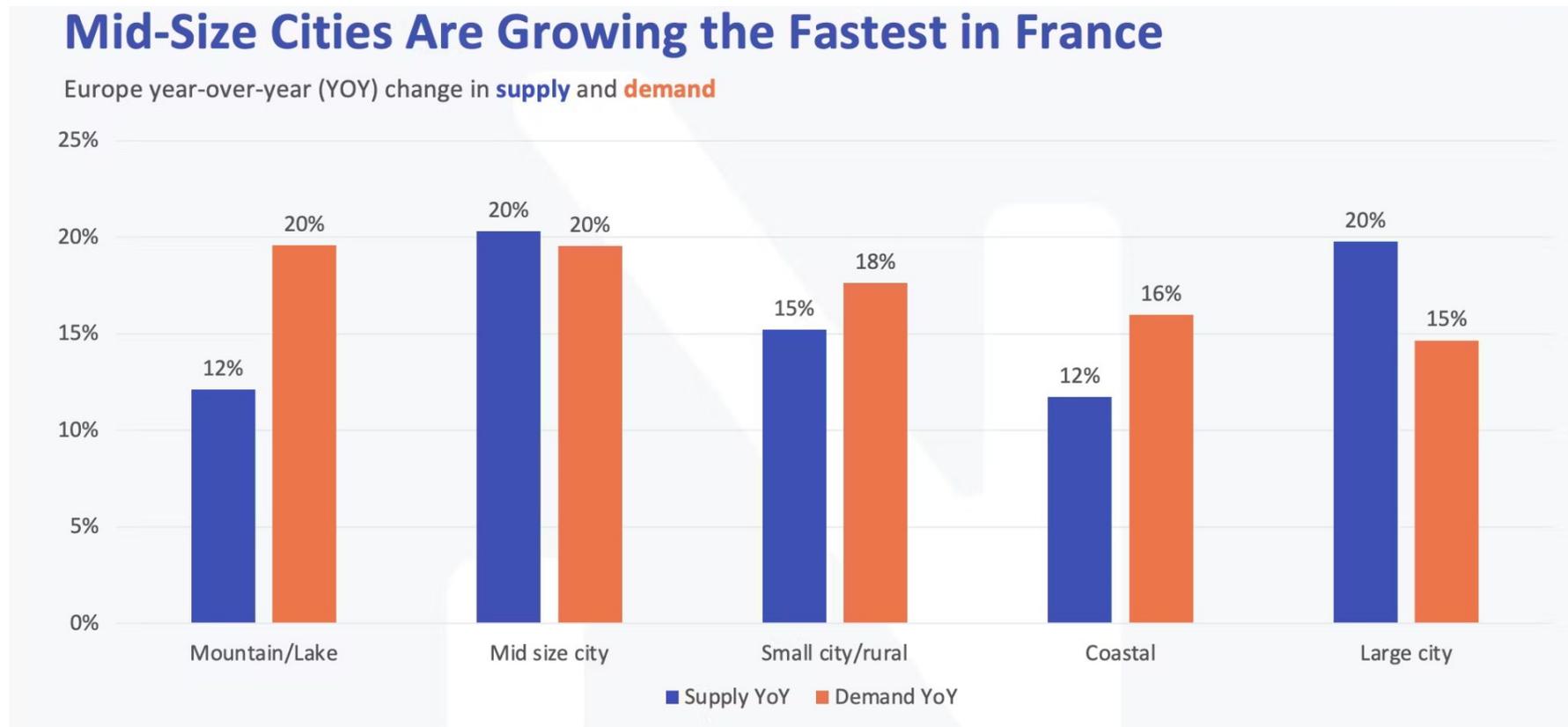


Source: [Eurostat](#), September, 2025

STR services and their recent performance: Focus on Europe

In 2025, STR growth has strengthened in midsize cities and second-tier destinations.

In France, midsize cities led with +20% YoY growth in both demand and supply, while large cities matched supply growth (+20%) but saw slower demand growth (+15%).



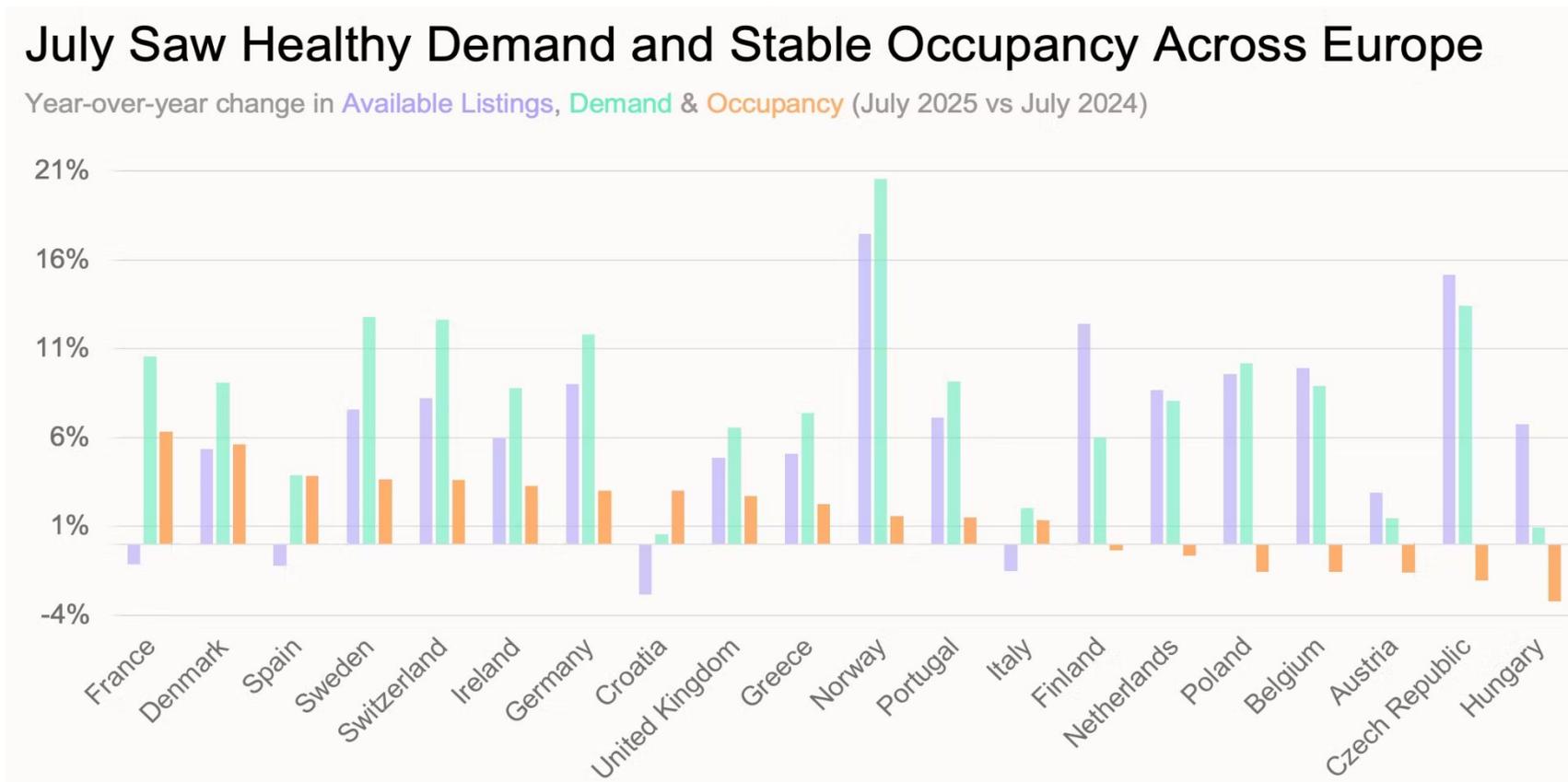
Source: [Airdna](#), May 2025

STR services and their recent performance: Focus on Europe



In July 2025, European STR occupancy held steady or rose across most markets.

France and Denmark led with +6% YoY growth, followed by Spain, Sweden, and Switzerland (+4%), Ireland, Germany, Croatia, and the UK (+3%), Greece, Norway, and Portugal (+2%), and Italy (+1%).

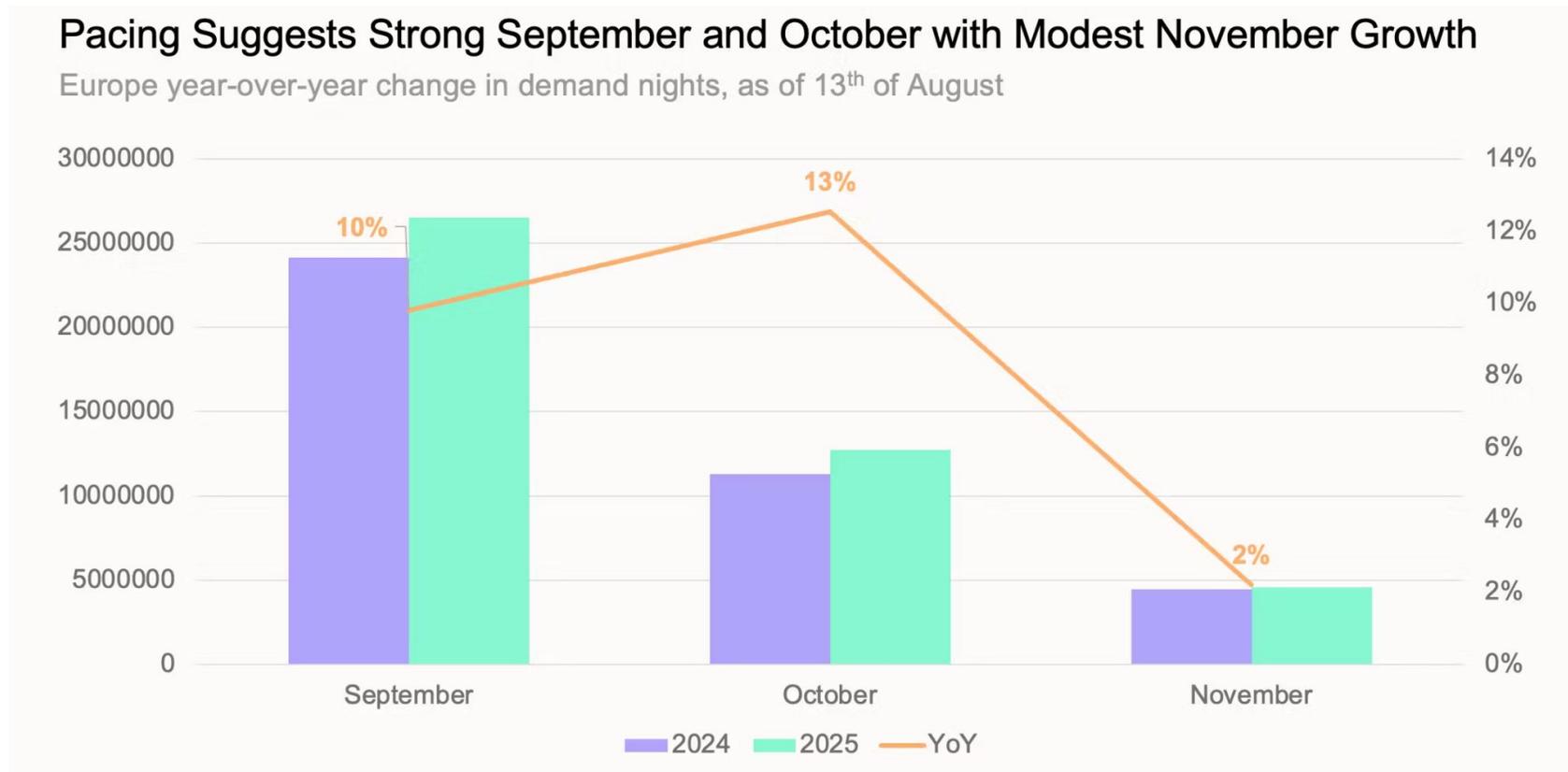


Source: [Airdna](#), August 2025

STR services and their recent performance: Focus on Europe

In mid-August, the pace of autumn STR bookings remained strong.

September bookings rose +10% year-over-year and October +13%, pointing out to a shift toward shoulder-season travel. November grew just +2%, signaling softer demand.



Source: [Airdna](#), August 2025



Recent initiatives by major platforms





Starting October 27, Airbnb will require property managers to move from the split-fee model (3% host + 14–16% guest) to a single-fee system, where hosts pay 15.5% and guests see no service fee at checkout. While this shifts costs onto hosts, Airbnb argues it keeps total booking prices and the managers will be able to protect their margins by adjusting nightly rates by ~15%.



Last week Airbnb also announced the launch of a new hotel interface. CEO Brian Chesky said at the Skift Global Forum that the company will integrate boutique and independent hotels directly into its core platform, building on the acquisition of HotelTonight in 2019.





Airbnb's moves must be seen in the context of growing competition worldwide.

In 2024, Booking achieved an estimated 400.4 million nights in alternative accommodations, nearly 80% of Airbnb's 491.5 million. Despite having less than half the listings (3.5M vs. Airbnb's 8M), Booking also generated nearly double the bookings per listing and grew faster in both nights and listings.

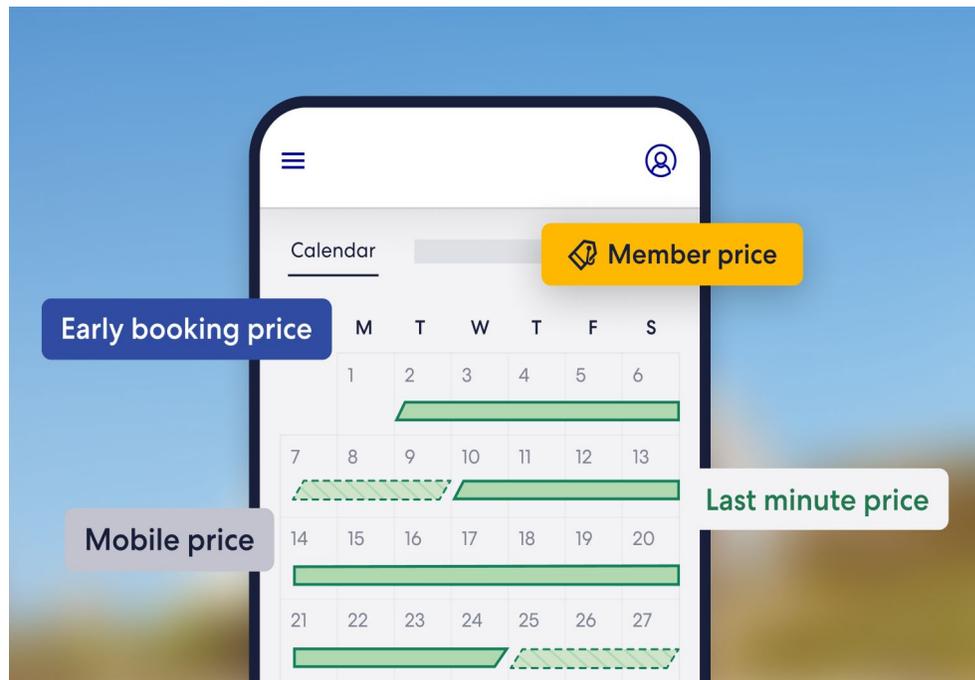


Source: [Miro Gospodinov](#), June 2025

Vrbo has recently enrolled out two major initiatives to boost competitiveness.

a. Its new Promotions Suite lets hosts target diverse traveller segments with early-booking and last-minute discounts.

b. Vrbo also partnered with Becoming rentABLE to improve accessibility. Eight new filters now help travelers with disabilities find suitable properties.





STR REGULATORY UPDATE (North America)



NEW ORLEANS: The City Council removed over 1,000 STR listings overnight after enforcing strict licensing rules: no permit, no listing. Platforms were compelled to delist unlicensed properties, with the impact most visible in the famous French Quarter. The move followed years of disputes over housing shortages and neighbourhood disruption ([Euro Weekly News](#), August 2025).



BEVERLY HILLS: The City Council has prohibited all STRs in single-family and multi-family units, and also cracks down on advertising: simply listing a property as STR now counts as a violation. Penalties are steep—\$1,500 for a first offense, \$3,000 for a second, and \$5,000 for further violations within 12 months, with each day treated as a separate offense ([City of Beverly Hills](#), August 2025).

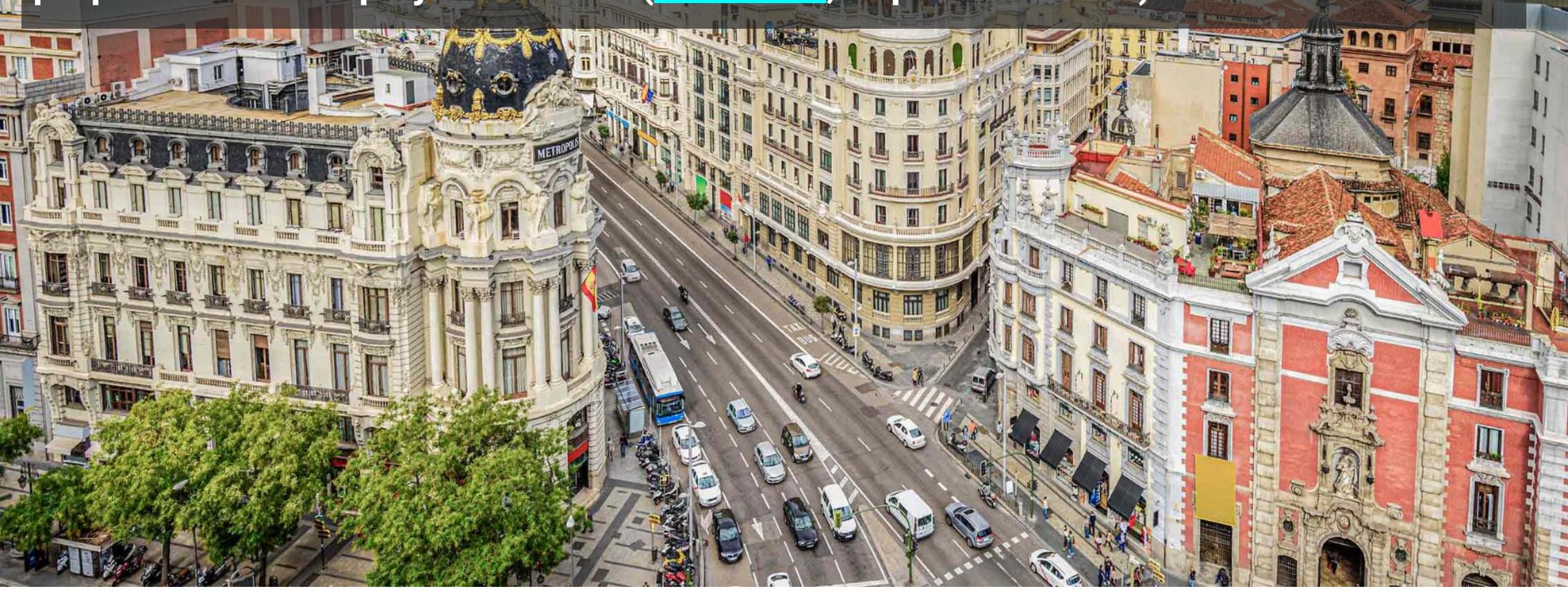




STR REGULATORY UPDATE (EU)



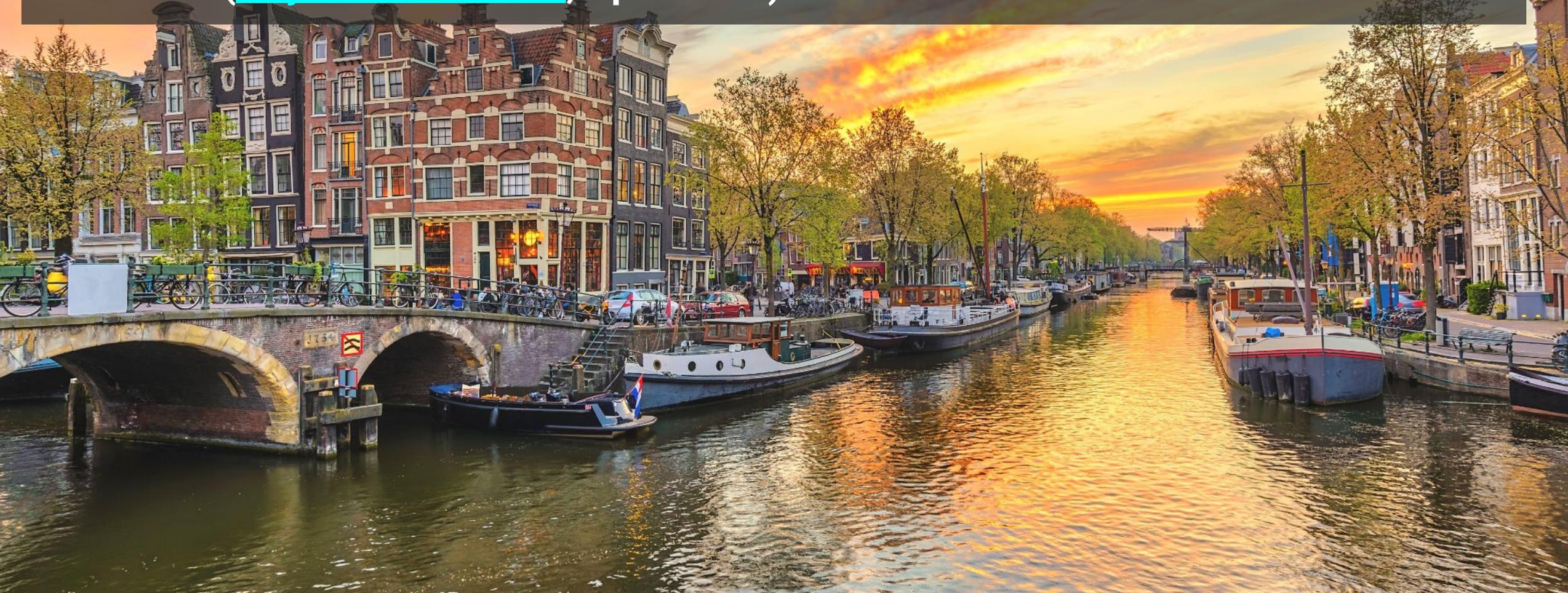
SPAIN: In September 2025, the government ordered the removal of 53,000 illegal tourist flats, converting them into permanent rentals to address housing shortages. Building on July's registration and reporting rules, Airbnb and other platforms were instructed to withdraw these listings, with Airbnb stating that nearly 70,000 properties now display valid codes ([Euronews](#), September 2025).



DUBLIN: In 2025, the City Council has issued around 300 warning letters to property owners for unauthorised STRs. Since STR legislation began in 2019, nearly 2,000 cases have been resolved through enforcement. Securing planning retention for such uses remains highly challenging, underscoring the city's strict regulatory stance ([Irish Independent](#), August 2025).



AMSTERDAM: The municipal executive board has proposed halving the annual holiday rental limit from 30 to 15 nights in two districts, aiming to curb nuisance and improve quality of life. Following consultation with stakeholders, a final decision is expected by the end of 2025, with implementation starting in April 2026 if confirmed ([City of Amsterdam](#), April 2025).



BRUSSELS: Tax authorities have fined owners of 2,000 Airbnb properties for failing to pay required taxes, alongside retroactive payments. Between €1.5–2 million could be recovered for 2022 alone. The move follows a 2022 European Court of Justice ruling upholding Brussels' 2016 tourist accommodation tax order, which obliges STR platforms to share data on operators, units, and overnight stays to enforce compliance ([The Bulletin](#), August 2025).



OSTEND: Ostend has announced plans to restrict STRs in certain neighbourhoods, citing heavy pressure on local infrastructure during peak tourism, when the city's population nearly triples. A new bylaw defining where holiday rentals will be allowed or banned will be finalised by year-end. The city will also prohibit key boxes, reinforcing host–guest contact ([Travel Tomorrow](#), August 2025).



GREECE: A new regulatory framework is set to take effect on October 1st, 2025. Mandatory safety and quality standards are introduced, requiring all STR properties to have civil liability insurance, fire extinguishers, smoke detectors, and a first-aid kit. Enforcement will be carried out by inspection teams, and a €5,000 fine will be imposed for non-compliance or refusal to allow an inspection, with penalties escalating to €10,000 and €20,000 for repeat offenses ([OT](#), September 2025).



STR Regulatory Updates (EU)



Between 2019 and 2024, **Greece saw a substantial increase of 91,000 beds added exclusively via Airbnb**. In comparison, the number of new hotel beds added during the same period was less than 40,000.

Year	Airbnb Beds	Airbnb Units	Hotel Beds	Hotel Units
2014	34.494	7.676	778.057	9.733
2015	47.060	10.362	781.142	9.762
2016	246.862	52.603	788.553	9.742
2017	420.570	89.961	806.045	9.795
2018	588.740	127.410	835.773	9.886
2019	696.110	152.077	856.347	9.984
2020	636.243	139.016	869.250	10.065
2021	614.360	134.551	879.255	10.110
2022	677.212	149.649	885.624	10.099
2023	743.127	165.915	887.748	10.059
2024	787.076	177.208	894.854	10.104

Source: Hellenic Chamber of Hotels (April 2025)

ATHENS: Greece also has extended the ban on new STR permits in central Athens until the end of 2026. Introduced in January 2025, the measure blocks new property registrations in the city's most pressured areas, where affordable long-term housing is scarce ([eKathimerini](#), June 2025).



CYPRUS: A new bill under review in Cyprus will align national rules with incoming EU regulations taking effect in May 2026. The law will require STR platforms to share detailed data with authorities and ensure only registered properties are listed. Stricter enforcement is also coming, including penalties for unregistered ads, targeted tax audits, and renewal monitoring ([Cyprus Mail](#), June 2025).





KEY TAKEAWAYS





Takeaway 1

Airbnb's latest report appears less an objective market analysis and more **a strategic effort to frame the European STR sector in a favorable light**—while shifting the blame for overtourism onto hotels.



Takeaway 2

The result is a narrative that overlooks structural challenges and risks **misrepresenting the true dynamics of Europe's accommodation market.**



Takeaway 3

Highlighting the report's bias and methodological flaws is crucial, particularly against the backdrop of strong STR growth in 2025, the wave of anti-overtourism protests sweeping Southern European destinations this year and the recent announcement by the EU commissioner, Ursula von der Leyen.



Takeaway 4

An increasing number of destinations are beginning—albeit cautiously—to signal **zero tolerance for the unchecked growth of STRs**, reflecting mounting pressure to protect housing, safeguard community well-being, and restore balance between tourism and local life.



Takeaway 5

Forcing platforms into full accountability—from data-sharing to delisting non-compliant rentals—will define the future of STRs, **shaping compliance, transparency, and their ability to coexist with long-term housing and community needs.**



Q&A

- THANK YOU -

