Understanding Short-Term Rental Monitoring for Sustainable Data-Driven Destination Management

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Abstract. Short-term rentals have gained importance in tourism accommodation sector and their expansion has been driven by digital platforms. This expansion has not yet been fully reflected in official statistical systems which can present challenges for monitoring and governance of short-term rental activity. The study provides a structured overview of data sources for short term-rentals and comparisons between platform-derived and official statistics. Using AirDNA and official statistics from 24 local destinations in Slovakia, the results show that there are significant differences in capacity to accommodate visitors indicating unregistered short term rental activities. The findings also highlight the supplementary nature of these data sources as well as the new registration system introduced by the european union and the need for data-supported management of destinations.

Keywords: Short-Term Rentals · Data-Driven Destination Management · Platform-Based Data · Official Tourism Statistics · EU Regulation

1 Introduction

The Short-Term Rentals (STRs), which now represents an important part of the worldwide tourism accommodation market, has experienced a very rapid expansion over the last ten years. The advent of online platforms such as Booking.com and Airbnb have caused a complete transformation in the manner in which accommodations are marketed and consumed [2]. With these on-line platforms, property owners can now lease their private homes to tourists and short-term visitors, thus generating new types of housing supplies that differ greatly from those provided by hotels. Therefore, STRs have progressed from being a small type of tourist accommodation related to the "sharing economy" into one of the most significant sectors of the tourism industry in numerous locations [5, 9].

Growth of peer-to-peer accommodations has received considerable attention in a number of different contexts (e.g., the overall development of the sharing economy; the emergence of new forms of digital platforms) as well as the ways in which these digital platforms enable individual stakeholders to generate additional revenue by monetizing unused resources (such as an extra room or even an entire property). For example, the

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emergence of STR platforms can provide hosts with additional sources of income while providing tourists with alternative, and in many cases, less expensive alternatives for their accommodations [9]. Many destinations are seeing an increase in STR capacity and diversity of the accommodation base, particularly in locations that lack sufficient hotel infrastructure [17].

Research has expanded rapidly over the past decade, reflecting the importance of this phenomenon in tourism, urban studies and housing research [5]. Studies have examined various aspects of the STR market, including its economic effects, impacts on the hotel industry, implications for housing markets and challenges related to regulation and governance [1, 4].

Despite the growing importance of short-term rentals, for many years this segment of the accommodation sector remained largely outside traditional statistical and regulatory frameworks [11]. Unlike hotels and other registered accommodation establishments, STRs hosts were often not required to report their activities to public authorities. Official tourism statistics frequently failed to capture the real scale of STRs activity.

This lack of reliable data created several governance challenges. Without comprehensive information about the number of listings, rental frequency, or geographical distribution of STR properties, policymakers have had limited ability to assess the actual size and development of the STR market. As a result, policy debates and regulatory responses were often based on incomplete or indirect data sources rather than systematic evidence [4].

Another challenge arises from the spatial concentration of STR activity. Research shows that STRs tend to cluster in areas with high tourism demand, particularly in historic city centres and popular urban neighbourhoods. Such spatial concentration may intensify tourism pressure and change the character of local communities [16]. Without adequate monitoring systems, local authorities may struggle to identify these spatial patterns and evaluate their impacts on urban environments.

Monitoring is an important factor in helping regulators enforce their policies. Cities are implementing new policies that regulate STRs through a variety of means, such as requiring property owners to register with the city, limiting how many times per year an owner can rent out their property and prohibiting entire home rentals [13]. These types of regulatory tools are less effective if there is no way to monitor whether those who rent out their properties comply with local regulations. If city officials do not have reliable data from platforms or official host registries, it can be very challenging to enforce such laws.

Furthermore, insufficient monitoring may create an uneven competitive environment between traditional accommodation providers and STR hosts. Hotels are typically subject to strict regulatory requirements, including safety standards, taxation and statistical reporting obligations. In contrast, many STR hosts historically operated with fewer regulatory obligations, which raised concerns regarding fair competition within the tourism accommodation sector [4]. Recently, the European Union has introduced new regulatory frameworks, which are expected to require digital platforms to share data with public authorities [11].

Therefore, the aim of the study is to provide a structured overview of short-term rental data sources, highlight key differences between platform-derived and official statistics and demonstrate these differences through an empirical case study.

2 Monitoring STRs as a Tool for Sustainable Data-Driven Destination Management

The monitoring of short-term rentals can be considered as an important component of sustainable data-driven destination management. Data on STR serves as basis for governance. The systematic analysis of such data enables destination management organizations to identify emerging pressures, including overtourism, housing market distortions and spatial imbalances. It informs the design and implementation of targeted regulatory measures (e.g., zoning, caps or dynamic restrictions). Data-driven monitoring enhances the capacity for adaptive, evidence-based decision-making and supports a more balanced integration of economic benefits with social equity and environmental sustainability objectives.

2.1 The Need for Data on Short-Term Rentals

In addition to regulatory and tourism statistical concerns, the growth of STRs is associated with additional social-economic implications, primarily regarding urban housing market conditions. There are an increasing number of studies that empirically demonstrate how increased numbers of STRs can impact housing supply and price levels within tourist destination cities.

Several studies have found that the growth of Airbnb listings can contribute to rising housing prices and rental costs. For example, research conducted in Boston identified a positive relationship between Airbnb activity and increases in rental prices, suggesting that the conversion of residential properties into STRs may reduce the supply of long-term housing [10]. Similarly, Barron et al. [1] found that increases in Airbnb listings across the United States were associated with measurable increases in both rents and housing prices.

The growth of STR platforms has several implications that are far reaching. Wachsmuth and Weisler [16] argue that the expansion of STRs could be an impetus to a form of tourism driven gentrification as it creates conditions under which property owners would choose to convert long term housing into more lucrative short term tourist accommodations. The process may create changes in the social composition of neighborhoods and potentially reduce available housing for local residents.

At the same time, STR's can be a source of positive financial impact on their host communities. The activity generated by STRs may cause visitors to spend money in their neighborhoods, help support local small business and create new income generating options for local residents [9]. As such the primary challenge facing policy makers is how to balance the possible economic positives from STR activity, with the negatives they are creating in regard to the housing market and community.

To achieve effective regulation of STR markets, government officials must have access to credible, consistent and accurate data that allow them to assess the scale,

dynamics and geographic location of short-term rental activity. Without this type of data, policymakers are unable to create evidence-based regulations or measure the success or failure of implemented regulatory measures.

2.2 The Role of Data Sharing and Regulatory Frameworks

Recognizing the challenges associated with STRs, governments and international organizations have increasingly focused on improving transparency and data availability in the STR sector. Several policy initiatives aim to establish mechanisms that enable public authorities to access reliable data about STR activity while respecting privacy and data protection requirements. Destination management organisations (DMOs) should be able to quickly respond to these rapid changes and challenges [7].

Improved data sharing between digital platforms and public authorities can significantly enhance the monitoring of STR markets [11]. Access to reliable data allows policymakers to identify active listings, analyse spatial distribution patterns and evaluate the intensity of STR activity across different locations.

Hotels, who often represent hotel associations, express concerns over the inequality of regulations and the competitive disadvantage they face in comparison to their competitors offering STR accommodation. For example, hotels and STR's offer similar types of accommodation, but are regulated under different systems of law, especially when it comes to taxes. Hotels may feel unfairly disadvantaged by the lack of regulations of STR accommodation. Additionally, many times STR listings appear side-by-side with hotel listings. Therefore, the lines between STR and hotels become increasingly blurred [15].

Data will enable policy makers to develop evidence-based policies that regulate the industry appropriately and assist in enforcing current laws and regulations.

Additionally, increased transparency helps to resolve issues such as taxation, safety standards and regulatory enforcement. Authorities' ability to collect accurate information about both hosts and properties will enable them to better collect taxes owed by STR providers and enforce compliance with applicable law. The creation of a fair and equitable marketplace between STRs and hotels is aided by these developments [4].

2.3 The Importance of Local-Level Measurement

While national and international regulatory frameworks are important for improving transparency in the STR sector, the measurement of STRs at the local level remains particularly crucial. The impacts of STR activity are often highly localized, with significant differences between cities, regions and neighbourhoods.

Local authorities require detailed and spatially disaggregated data to understand how short-term rentals affect local housing markets, tourism flows and community dynamics, as well as to improve regulatory enforcement, limit the expansion of the informal economy and ensure proper taxation of STR activities. Measuring STR activity at the municipal level allows policymakers to identify areas with high concentrations of listings and monitor potential pressures related to tourism intensity or housing availability.

In addition, local-level measurement enables the development of targeted policy responses adapted to specific local conditions. While some destinations may experience

challenges related to overtourism and housing shortages, others may benefit from STR development as a tool for tourism diversification or regional economic development. Accurate data are therefore essential for designing policies that balance tourism growth with the protection of residential housing and community well-being.

As such, an improved way to monitor and measure short-term rentals in communities is emerging as a major priority among local governments and scholars. The availability of reliable data serves as the basis for informed decision making in government through evidence based governance and enables the formulation of sustainable tourism policy with consideration given to both the positive economic effects and negative societal effects.

Although there is growing research regarding STR's, many gaps exist with regards to comparing, assessing the reliability of, and measuring the policy relevance of various STR data sources, especially at the local level. The majority of existing research has examined the effects of STR on housing markets, tourism dynamics, and urban changes, whereas very little focus has been placed on the underlying data systems that affect how these phenomena are being collected and interpreted as data.

The recent introduction of Regulation (EU) 2024/1028 of the European Parliament and of the Council [6] marks a significant shift towards the institutionalisation of STR data through mandatory registration systems and platform data-sharing obligations in the European Union (EU). In addition to these studies, however, very little has been done to identify how new regulations are likely to affect the current limitations of STR data, as well as increase the reliability and transparency of STR data, and enable better use of STR data in local destination management. This study therefore adds a contribution to the scientific literature with the comparison of local platform-based STR data with official local STR data and analysis of possible discrepancies in measurement and the consequences for local tourism governance.

3 Methodology

This study uses a comparative and exploratory research approach in order to identify the differences at a local level (number of accommodation units and estimated revenues) and evaluate the potential applications to data driven destination management among platform derived short term rental data and official tourism statistics.

The aim of this paper is to provide a structured overview of short-term rental data sources, highlight key differences between platform-derived and official statistics and demonstrate these differences through an empirical case study using AirDNA data at the local level.

The analysis is based on two primary data sources. The first source of data was provided by AirDNA. AirDNA is a private company that offers commercial analytics about STRs at the level of individual listings. The data collected from AirDNA included, among other items, the total number of active listings for STRs as well as the estimated revenue generated by these listings. Second, official data on accommodation establishments and tourism income were sourced from the Statistical Office of the Slovak Republic, which collects data from legally registered accommodation providers through mandatory statistical reporting.

The type of unit used to measure is different within each dataset. Official datasets are usually measured by "establishment," with establishments able to contain multiple rooms or units. AirDNA's dataset is measured based on listings, which most often represent one single rental unit. Therefore, it is important to take into account the differences in measurement types when comparing these results. It could also limit comparison in terms of the actual total number for each dataset.

The study focuses on 24 selected destinations in Slovakia where STR activity was identified. The selection of these areas represents a mix of city based local tourism destinations with adequate data regarding STRs collected by AirDNA, along with other areas such as mountainous or spa areas that are well-established regional destinations. The geographic area of analysis corresponds to the municipal level of analysis (NUTS 4/LAU) since this is an appropriate scale for destination planning and policy making at a local level. In addition to empirical evidence, the study also draws upon additional contextual information regarding Eurostat's experimental statistical data collection and the European Union's legal regulatory framework [6].

4 Results

4.1 Comparison of STR Data Sources

The availability and source of data on short-term rentals varies. Data can be obtained from commercial STR analytics platforms, open-data platforms, Eurostat experimental statistics and from STR registration systems (Table 1).

Commercial STR analytics platforms (e.g. AirDNA, Lighthouse, Rabbu, Airbtics, AllTheRooms) offer the most granular data, typically at the listing level and in near real-time. Their datasets include performance indicators such as pricing, occupancy and revenue, making them suitable for market intelligence and investment. Their data collection relies primarily on web scraping and API integrations from major STR platforms. Although they provide highly granular data, covering listings, neighbourhoods and cities, however they are not aligned with official statistical classifications such as NUTS2 and NUTS 3 (see Table 1), which limits their comparability in policy contexts (Fig. 1).

Open-data platforms for STR provide medium to high data availability, often in the form of periodic snapshots with partial geographic or platform coverage. These datasets are widely used for research, transparency initiatives and housing market monitoring [3, 12]. Their sources include web scraping projects (e.g. Inside Airbnb), municipal open-data portals and academic datasets. Similar to commercial platforms, they offer fine spatial granularity at the listing and neighbourhood levels, but their coverage is inconsistent and often fragmented across cities.

Eurostat's experimental statistics represent a shift toward harmonised and officially validated STR data at the European level. These datasets are based on direct data-sharing agreements with major platforms (Airbnb, Booking, Expedia) and provide aggregated indicators such as guest nights and stays. Their primary purpose is to support official statistics, policy analysis and cross-country comparability. However, this standardisation comes at the cost of reduced spatial granularity, with data typically available at NUTS 2 (monthly) and NUTS 3 (annual) levels and only limited city-level detail (capital cities,

Table 1. Data sources on STR

Source	Data Availability	Purpose	Data Source	Granularity (NUTS)
Commercial STR analytics platform	Very high (listing-level, pricing, occupancy, revenue, near Real-Time)	Market intelligence, investment analysis, revenue optimization	Web scraping/ API integrations	Listing, neighbourhood, city
Open-data platforms for STR	Medium–high (listing-level, periodic snapshots, partial coverage depending on city/platform)	Research, transparency, policy analysis, housing market monitoring	Web scraping (e.g. Inside Airbnb), municipal open-data portals, academic datasets	Listing, neighbourhood, city,
Eurostat experimental statistics	Medium (aggregated EU-wide indicators)	Official statistics, policy analysis, comparability	Direct data sharing agreements with platforms	NUTS 2 (monthly), NUTS 3 (annual), selected cities
STR registration systems (EU regulation)	Potentially very high (mandatory reporting)	Regulation, taxation, housing policy, transparency	Mandatory platform reporting to national authorities	Listing-level, LAU, NUTS 3, NUTS 2, national
Commercial STR analytics platform	Very high (listing-level, pricing, occupancy, revenue, near Real-Time)	Market intelligence, investment analysis, revenue optimization	Web scraping/ API integrations	Listing, neighbourhood, city

Source: Own elaboration

cities with 200.000 or more inhabitants, and other selected cities with relevance for tourism).

STR registration systems introduced under the new EU regulatory framework represent a significant transformation in the STR data ecosystem. By mandating platform reporting to national authorities, these systems are expected to provide highly comprehensive and reliable data, potentially covering the entire market. Their purpose extends beyond analysis to include regulation, taxation, housing policy and transparency. Importantly, these systems enable multi-level spatial aggregation, from individual listings and local administrative units (LAU) to NUTS 3, NUTS 2 and national levels, thereby bridging the gap between granularity and standardisation.

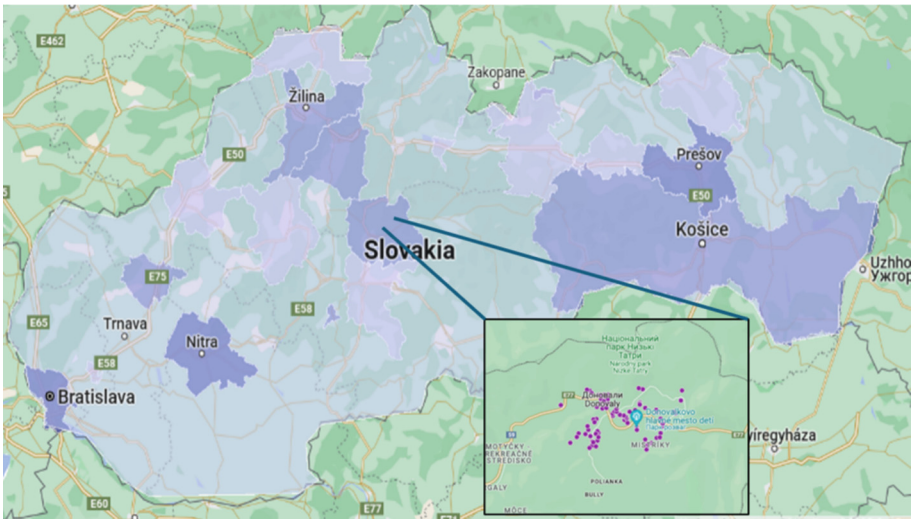

Fig. 1. The example of data granularity from AirDNA

So far, the most granular data is provided by commercial STR analytics platforms. Therefore, we illustrate the data availability and comparability of these commercial platforms and national statistics.

4.2 Data from National Statistics vs Commercial Platforms

The use of AirDNA as a representative commercial data source reflects the current practice in STR research and data-driven destination management, where platform-derived datasets are frequently employed to complement incomplete official statistics. This approach is particularly relevant in contexts where informal or unregistered accommodation is not captured by statistical reporting systems. By comparing these two data sources (Table 2), the analysis highlights both the added value of high-granularity platform data and the limitations of relying solely on official statistics.

The table presents a comparative overview of short-term rental activity across 24 selected local destinations in Slovakia, where STR listings were identified using AirDNA data. All these tourist destinations have been characterized as having reasonably high visitor demand. An obvious difference exists between both data sets. Statistics provide data on formally registered accommodations that are legally permitted to participate in tourism activities. Formally registered accommodations are required to submit information regarding their tourism-related activities through standardized statistical surveys that are mandatory. By contrast, AIRDNA records all accommodation types available for short-term rental offers via online platforms, regardless of whether these operators are officially registered. As a result, informal or unregistered accommodation providers, who are not included in official statistics, are reflected in the AirDNA dataset.

The comparison reveals that in 20 out of the 24 analysed destinations, the number of accommodation facilities identified by AirDNA exceeds those reported by official

Table 2. Comparison of data on accommodation facilities from national statistics and commercial STR platforms

No.	Destination	Accom. Facilities (Stat. Office)	Accom. Facilities (AirDNA)	Difference (abs.)	Tourism Income (Stat. Office, in thousands of EUR)	Tourism Income (AirDNA, in thousands of EUR)
1.	Senec	30	51	21	3 572	356
2.	Nitra	40	92	52	5 943	2 072
3.	Piešťany	39	122	83	25 598	461
4.	Trenčín	41	120	79	4 416	448
5.	Trenčianske Teplice	27	19	-8	10 878	109
6.	Bojnice	30	50	20	4 167	384
7.	Rajecké Teplice	24	31	7	5 645	285
8.	Žilina	47	131	84	5 915	838
9.	Martin	35	109	74	2 617	506
10.	Banská Štiavnica	81	130	49	2 883	1 079
11.	Donovaly	62	95	33	3 506	761
12.	Kováčová	10	4	−6	696	33
13.	Banská Bystrica	42	198	156	4 560	1 151
14.	Zvolen	19	35	16	3 146	205
15.	Demänovská Dolina	104	55	−49	21 276	544
16.	Liptovský Mikuláš	105	238	133	9 832	1 680
17.	Liptovský Ján	34	37	3	5 225	278
18.	Vysoké Tatry	210	278	68	39 657	3 639
19.	Poprad	81	179	98	6 807	755
20.	Kežmarok	17	33	16	778	153
21.	Spišská Nová Ves	15	22	7	1 254	99
22.	Prešov	45	82	37	3 185	282
23.	Košice	176	601	425	20 889	3 722

(*continued*)

Table 2. (*continued*)

No.	Destination	Accom. Facilities (Stat. Office)	Accom. Facilities (AirDNA)	Difference (abs.)	Tourism Income (Stat. Office, in thousands of EUR)	Tourism Income (AirDNA, in thousands of EUR)
24.	Bardejov	38	29	−9	4 245	75
Sum		**1352**	**2741**	**1389**	**196 691**	**19 916**
Average		**56**	**114**	**58**	**8 195**	**830**
St. deviation		**50**	**126**	**92**	**9 405**	**1 013**
Min		**10**	**4**	**−49**	**696**	**33**
Max		**210**	**601**	**425**	**39 657**	**3 722**

Source: Own elaboration

statistics. The differences are substantial, reaching up to 425 units in absolute terms (e.g. in Košice). In aggregate, AirDNA identifies 2,741 accommodation units compared to 1,352 recorded in official statistics, resulting in a total difference of 1,389 units. This suggests a significant volume of accommodation capacity that remains outside the scope of official statistical monitoring and in some cases also from official registers of accommodation providers and taxpayers.

A similar pattern is observed in tourism income estimates. While official statistics report substantially higher total revenues, reflecting the inclusion of formal, often larger-scale accommodation providers, AirDNA captures a smaller but non-negligible share of income generated through platform-based rentals, which typically consist of a high number of small-scale units generating lower revenue per unit. The difference between these two types of accommodation illustrates a "volume vs. scale" paradigm in the way that traditional suppliers generate greater revenue through fewer properties and platform based rental property owners do with multiple individual properties. Due to the lack of formal registration, such activity may fall within the grey economy.

The table illustrates the limitations of relying solely on official statistics for understanding the full scope of tourism accommodation supply. At the same time, it also provides evidence of the additional benefits that can be derived from using platform-based data to identify areas within the tourism industry that have not been previously identified as being part of the formal or traditional tourist supply chain. The results show how important it is to use multiple data sets to better understand and manage destinations through more complete and accurate data-driven destination management.

The differences in the definitions and methods of AirDNA versus official sources limit direct comparison, as well as comparisons of listings versus formally registered accommodation establishments, and/or estimates of revenue vs. reported income. Additionally, the lack of clarity regarding how they collect their data and model their outputs makes it difficult for others to reproduce results, which can limit the strength of conclusions drawn from empirical studies. Although AirDNA is a very detailed and valuable

data source, all users should exercise caution when using AirDNA's outputs and combine them with official statistics whenever possible, to allow for a much more complete and accurate study of dynamic behavior in short term rentals.

This limitation can be overcome by new EU regulation. The adoption of Regulation (EU) 2024/1028 on short-term rental data marks a turning point, introducing mandatory registration systems and obligations for platforms to share data with national authorities. This framework is expected to significantly enhance data completeness, accuracy and spatial granularity, enabling access to listing-level information that can be aggregated across multiple territorial levels (from local administrative units to national and EU scales).

It reflects a transition from fragmented, platform-driven data collection towards a more integrated and regulated data ecosystem. This shift has important implications for data-driven destination management, as it improves the capacity of public authorities and destination management organisations to monitor, regulate and strategically manage tourism development.

These results are subject to many limitations that affect the interpretation of these results. As an example, data from platforms (such as AirDNA) is based upon estimates which do not account for all of the short-term rentals. Also, there are issues with how data is defined and collected by different sources. This will impact the ability to compare officially reported numbers with those found through platforms.

5 Conclusion

Until now, destination management has relied on a combination of statistics, commercial short-term rental analytics platforms and open-data platforms. The new regulation introduces mandatory registration systems and platform data-sharing obligations, which will significantly improve data completeness and coverage of the entire STR market. A key benefit is the availability of listing-level data, which can be aggregated to LAU, NUTS3 and NUTS 2 levels. DMOs will be able to identify hotspots and spatial concentration of STRs and monitor tourism pressure at neighbourhood level. With access to reliable data, public authorities can enforce registration and compliance, monitor illegal or unregistered rentals, improve tax collection and design targeted housing and tourism policies.

This shifts destination management from reactive to proactive and evidence-based decisions. Improved data availability enables DMO's and municipalities to achieve equilibrium between tourism growth and residential need, limits concentration of STR and supports sustainable tourism development.

This study's findings are also subject to additional interpretations based on the changing role of DMOs as they become embedded into smart data governance frameworks. Recent studies [8, 14] describe DMOs in a more contemporary role than that of merely coordinator/ marketer. They are now described as knowledge actors at the center of destination networks, thus, capable of influencing development outcomes. This inclusion of STR data is a critical component which enables the DMOs to perform their new role.

In addition to functioning as traditional knowledge generators, DMOs are becoming required to perform several other functions including acting as data miners, knowledge

hubs and boundary spanners [8]. Acting as data miners, DMOs can use STR data to identify hidden trends in tourist demand or location specific concentrations of tourist accommodation supply or informal accommodations. Furthermore, by acting as data miners, DMOs can address the previously identified deficiencies in the quality and quantity of available data from official and platform-based sources. Acting as knowledge hubs, DMOs can act as an intermediary to gather multiple types of data sets (commercial, official and regulatory), redistribute this information among relevant stakeholders and enable stakeholders to make informed decisions using empirical evidence. Finally, by acting as boundary spanners, DMOs can link destination systems at the local level with access to external knowledge sources (national statistical offices, digital platforms, emerging European Union regulatory structures). In doing so, DMOs may be able to mitigate some of the data-related challenges they currently experience [8], management related challenges and methodology related challenges.

The observed discrepancies between AirDNA and official statistics highlight the fragmented nature of current data ecosystems, which requires active mediation and interpretation. In this regard, DMOs play an important role in translating data into actionable knowledge, facilitating stakeholder coordination and supporting policy interventions. Moreover, the upcoming EU regulation on STR data further reinforces this transformation by providing more comprehensive and standardized data inputs, thereby strengthening the capacity of DMOs to act as smart leaders in data-driven destination management. Thus, future research should focus on how the implementation of the EU regulation will affect data quality, availability and integration across different sources. The regulation also creates new opportunities for research in data-driven destination management by enabling more precise analyses at the local level.

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