

ABNB - KPI Tracker

Executive Summary

This data product from Airbtics provides a monthly prediction on Airbnb's Gross Booking Value (GBV) and Total Nights Booked (TNB). The granularity of the data is country level, which can be used as an alpha source for trading ABNB stock.

The data product is sourced and built by Airbtics, which specializes in providing short-term rental data to Airbnb Hosts. The firm was founded in 2019 July and has been producing Airbnb's KPI prediction since January 2021.

Data Overview

The reviews on Airbnb are the result of actual bookings. We've built a model to estimate when the bookings (reviews) were made using Airbnb's calendar data. The history from 2015 to 2020 was used to validate the model we used.

The dataset differs from other Airbnb KPI predictors in one important way. It uses Airbnb's user review data combined with Airbnb calendar data to identify the booking dates of the reviews. It makes the dataset accurate as opposed to solely relying on the calendar data, which doesn't tell whether blocked days are booked on Airbnb or other platforms.

Data Collection Methodology: Web scraping. Collecting from 7 Million Airbnb listings weekly.

Data Update Frequency: Monthly

Data Update Lag: 2 weeks

Historical Data: 2015 (5 years)

Granularity: Per Country

Uniqueness: Unique, replicable only at a very high cost.

Market Awareness: Exclusive awareness, proprietary secret by owners/users

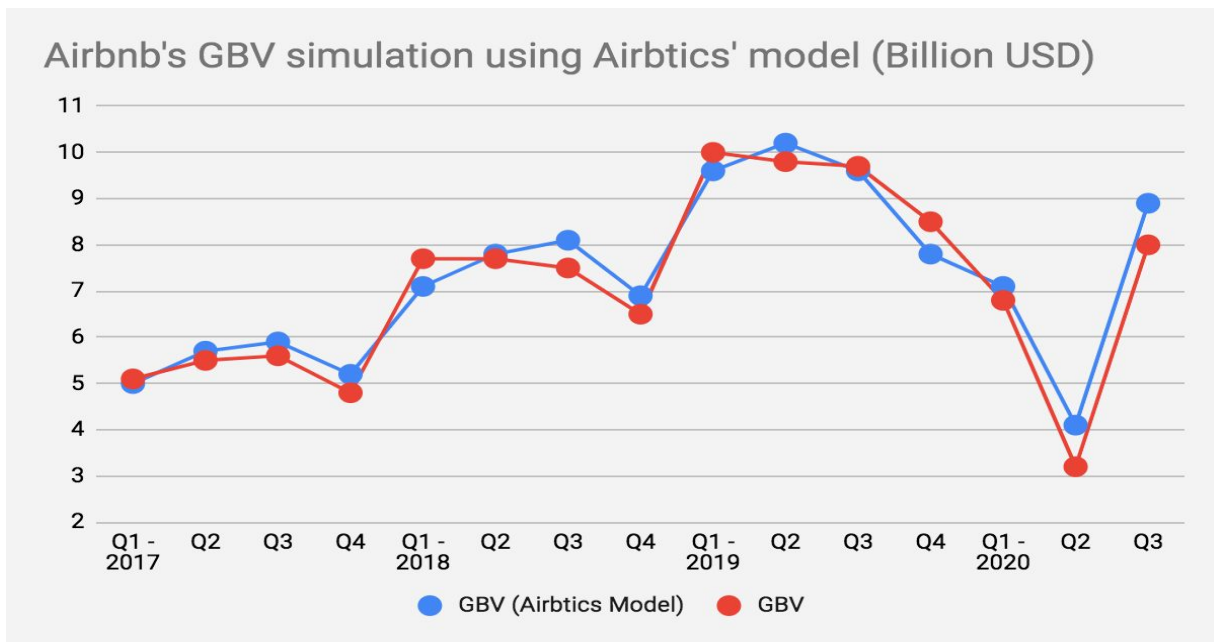
Hedge Fund Usage: <5 funds

Validation

Airbtics' KPI Tracker appears to strongly match Airbnb's KPIs disclosed through S1 filings.

- Used Pearson product moment correlation coefficient

Metrics	Period	Frequency	Granularity	Correlation
GBV	2017 - 2020	Quarterly	Worldwide	97.2
GBV	2015 - 2020	Yearly	Worldwide	99.84
GBV	2019	Yearly	Continent	99.8
GBV	2019 Sept - 2020 Sept	Monthly	Worldwide	87
TNB	2017 - 2020	Quarterly	Worldwide	97.1
TNB	2015 - 2020	Yearly	Worldwide	99.84
TNB	2019	Yearly	Continent	98.1
TNB	2019 Sept - 2020 Sept	Monthly	Worldwide	88.7
Average Daily Rate	2019	Yearly	Continent	94.6
Average Length of Stay	2019	Yearly	Continent	91



Applications

1. Fundamental investing

The dataset can be used as a source of alpha for buying or selling ABNB stock.

Trial

You can try the sample data here. You can even purchase some of historical data - <https://data.airbtics.com/#/products/763d48b4-4e91-42dc-9fd5-5e877ec608ed>

You can directly schedule a call with the director at Airbtics to discuss further details - <https://calendly.com/jaeseokn/airbtics-demo>

Feel free to ask questions via jae@airbtics.com