

Murray Cox
Founder, Inside Airbnb

insideairbnb.com

 @insideairbnb

 /insideairbnb

492 Macon St #2
Brooklyn NY 11233
United States

ph: +1 (917) 592 9700

The Honourable Members and Staff of the Economics and Industry Standing Committee

Ms Jessica Jane Shaw MLA
Mr Sean Kimberley L'Estrange MLA
Mr Yaz Mubarakai MLA
Mr Stephen James Price MLA
Hon. Donald Terrence (Terry) Redman MLA
Dr David Worth
Mr Lachlan Gregory

Sunday, 3 February 2019

Re: Response to Inquiry into Short-Stay Accommodation in WA

Dear Committee Members and Staff,

Thank you for the invitation to provide information to your inquiry into Short-Stay Accommodation in W.A..

My name is Murray Cox, and I am the founder of **Inside Airbnb** (<http://insideairbnb.com>), a mission driven project to provide data that quantifies the impact of short-stay accommodation on housing and residential communities; and also provides a platform to advocate for appropriate and effective policies to protect our cities from the impacts of short-term rental of residential properties.

The purpose of my response to your inquiry is to:

- 1. Highlight the existence of independent, reliable data on short-stay accommodation in Western Australia**
- 2. Define the characteristics of the short-stay accommodation market in Western Australia, especially its commercial, non-residential nature**
- 3. Provide observations of relevant research, policy analysis, and a recommended policy frameworks**
- 4. Extend an offer to provide further testimony, data or advice to the committee if requested; or to facilitate connections to researchers, or to other cities and states.**

Key findings from my response include:

- **Entire home listings dominate the platform in W.A., making up 70% of all Airbnb listings and 92% of revenue**
- **Airbnb continues to grow, almost exclusively in Entire home type listings**
- **Most Entire homes Airbnb listings are not being rented “occasionally”**
- **Almost half (46%) of Entire home Airbnb listings are part of a property portfolio**

These findings provide clear evidence for the regulation of the short-stay accommodation market in W.A., especially for entire homes.

My policy recommendations, based on my global experience and data-driven research include:

- 1. A permit system to ensure that hosts are operating only in properties that meet specific criteria**
- 2. Platform accountability ensuring that all internet listings have permit numbers displayed, with penalties for hosts and platforms for non-compliance**
- 3. Data reporting by the host or platforms to allow measurement of the industry and to further ensure compliance**
- 4. Statewide laws should be restrictive (see proposed restrictions below), with the ability of some councils to opt-out with more permissive use, as opposed to a permissive statewide approach**

Specific state-wide restrictions should include:

- 1. No short-stay use in apartment buildings unless the by-laws are written or changed to allow them**
- 2. All short-stay use to require proof of primary residency (owner occupier, or tenant with permission)**
- 3. Yearly restrictions on entire home short-stay accommodation allowing no more than 90-days rental per year**
- 4. Limits on the number of rooms/guests for hosted stays to provide differentiation from a “Bed and Breakfast”**

I am available for questions, discussions, or the supply or analysis of additional data, or you are welcome to use data made freely available for independent analysis at <http://insideairbnb.com/get-the-data.html>.

Thank you for the opportunity to respond to this well timed and intentioned Inquiry.

Sincerely,



Murray Cox

Founder of Inside Airbnb

“Home Sharing” or Commercial Use?

Entire Homes Dominate

While Airbnb might have started with “Air beds” and hosts renting “spare rooms”, in W.A., like most regions around the world, Entire home listings dominate the platform, **making up 70% of all Airbnb listings and 92% of revenue.**

The high proportion of Entire home listings is inconsistent with the image represented by Airbnb lobbyists – that “hosts” are renting out “spare” rooms and that “guests” can “live like a local”.

Entire home listings have the most potential to disrupt residential communities, remove housing, displace residents, raise housing costs, and conflict with zoning laws; and the class of short-stay accommodation that policy makers should prioritise to regulate to limit these undesirable impacts.

The reliance on revenue from Entire homes use explains the strong push for de-regulation by platforms and a continued effort to mischaracterise their business.

Room Type	Listings		Estimated Revenue (last 12 mo.)	
	#	%	\$	%
Entire home/apt	8,448	70%	\$86,331,092	92%
Private room	3,542	29%	\$7,574,019	8%
Shared room	129	1%	\$55,304	0%
Total	12,119	100%	\$93,960,415	100%

Table 1 Airbnb Listings and Revenue by Room Type in W.A. as at 12/2018

Not only do Entire home listings make up the majority of Airbnb’s listings in W.A., they make almost all of Airbnb’s revenue.

Inside Airbnb: WA. Distribution of Listings and Revenue
12/2018

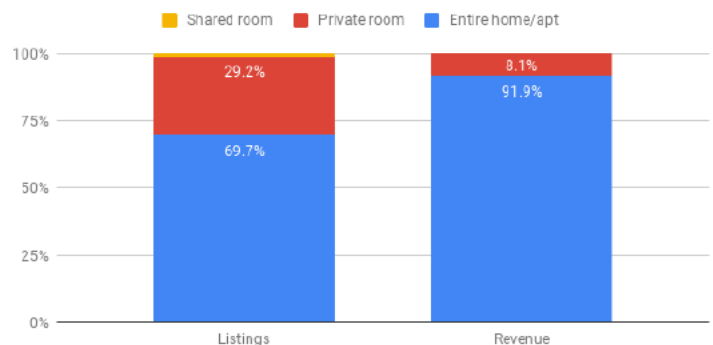


Figure 1 Listings by Room Type 2016-2018.
Entire Home listings dominate and are growing.

“Entire home listings dominate the platform in W.A., making up 70% of all Airbnb listings and 92% of revenue.”

The Growth of Entire Homes

Room Type	12/2016	12/2017		12/2018	
	#	#	% Growth	#	% Growth
Entire home/apt	4,609	6,803	48%	8,448	24%
Private room	2,982	3,551	19%	3,542	0%
Shared room	94	97	3%	129	33%
Total	7,685	10,451	48%	12,119	24%

Table 2 Airbnb Listing Growth by Room Type in W.A. 12/2016 – 12/2018

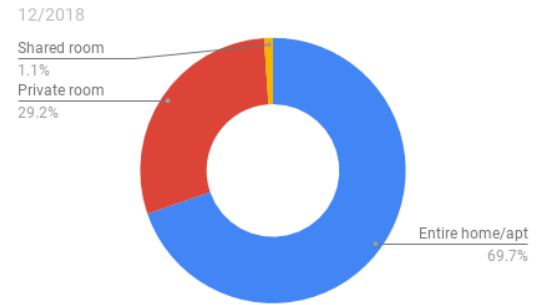
Airbnb continues to grow, almost exclusively in Entire home type listings.

Airbnb listings grew 24% in the 12 months to 12/2018, with almost all growth in the “Entire home/apt” room type.

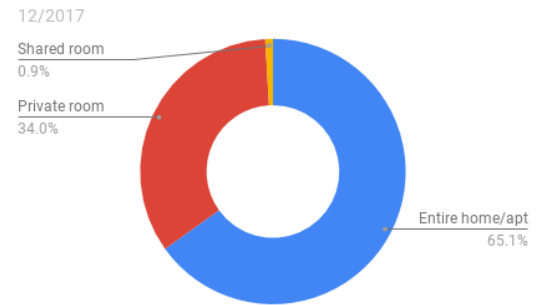
Without regulation, growth in the conversion of residential homes to tourist accommodation could be expected to continue, especially as property owners recognise opportunities to make profits.

In some Local Government Areas (LGA’s) the growth rate of Entire Homes is higher than average. These include Busselton (33%), August-Margaret River (31%), Albany (63%), Bunbury (74%).

Inside Airbnb: WA. Room Type



Inside Airbnb: WA. Room Type



Inside Airbnb: WA. Room Type

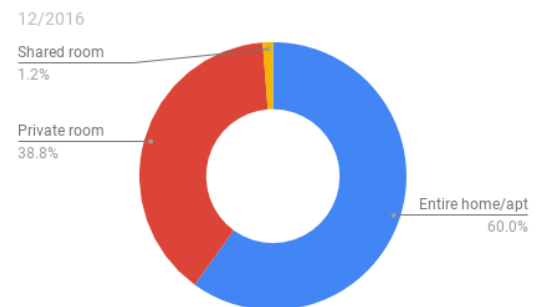


Figure 2 Listings by Room Type 2016-2018.

Entire Home listings dominate and are growing.

Inside Airbnb: WA. Room Type

12/2016 - 12/2018

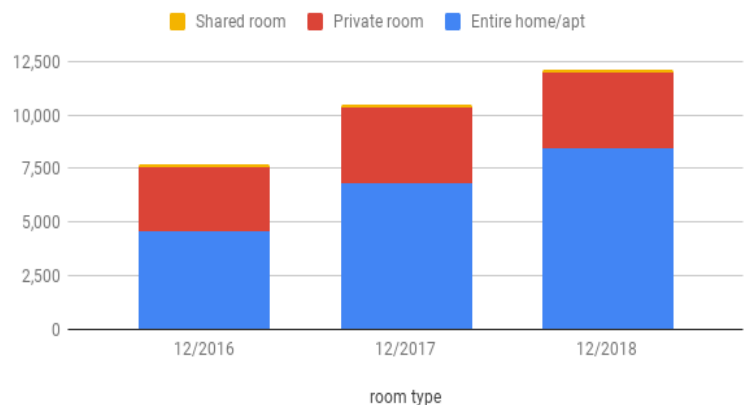


Figure 3 Number of Listings by Room Type 2016-2018.

Entire Home listings dominate and are growing.

“Airbnb continues to grow, almost exclusively in Entire home type listings.”

Entire Homes - Occasional or Full Time?

The majority of Entire home Airbnb listings (55%) are being rented for more than 30 days in the year, and 29% are being rented for more than 90 nights per year (a threshold used by many policy makers to define commercial use).

It is essential that thresholds for commercial use are defined in planning laws in order to be able to appropriately limit full-time commercial use of residential properties where appropriate.

Significant revenue is being generated from “full-time” Airbnb rentals, providing more evidence that this activity should be regulated as a commercial activity, not as residential or permissible use.

<i>Estimated Occupancy (last 12 mo.)</i>	Entire Homes		Estimated Revenue	
	#	\$	\$	%
0 - 29	3,773	44.7%	\$5,699,246	6.6%
30 - 59	1,329	15.7%	\$10,729,826	12.4%
60 - 89	921	10.9%	\$11,790,916	13.7%
90 - 119	637	7.5%	\$10,475,958	12.1%
120 - 149	453	5.4%	\$9,294,438	10.8%
150 - 179	321	3.8%	\$7,631,392	8.8%
180 - 209	249	2.9%	\$6,360,510	7.4%
210 - 239	184	2.2%	\$5,558,810	6.4%
240+	581	6.9%	\$18,789,996	21.8%
Total	8,448	100.0%	\$86,331,092	100.0%

Table 3 Estimated Occupancy of Entire Home Airbnb Listings in W.A. 12/2018

Most Entire homes Airbnb listings are not being rented “occasionally”.

Inside Airbnb: WA. Entire Home Occupancy

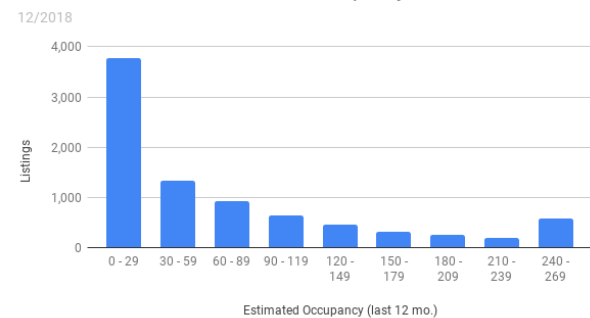


Figure 4 Number of Entire home/apt Listings by Occupancy 12/2018.

Inside Airbnb: WA. Entire Home Revenue by Occupancy

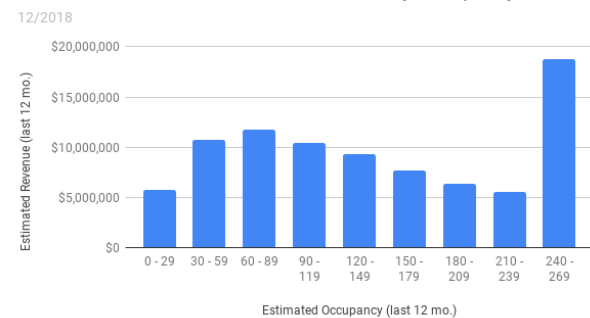


Figure 5 Revenue from Entire home/apt Listings by Occupancy 12/2018.

“Most Entire homes Airbnb listings are not being rented ‘occasionally’”

Property Portfolios

46% of Entire Home Rentals are managed by a “host” that has more than one entire home rental. These listings are clearly not primary residences of the host and are instead part of portfolios controlled by property investors and managers.

Most policy makers whose goal is to maintain the residential nature of short-stay accommodation use mechanisms like permits (with platform accountability), proof of primary residence, no more than one Entire home per host, yearly caps, and for tenants, proof that the landlord has allowed them to rent the entire home when they are not present.

Number of Entire homes/apts managed by host	Listings		Cumulative % (e.g. “2 or more”)
	#	%	
1	4,597	54%	100%
2	1,108	13%	46%
3	396	5%	32%
4	284	3%	28%
5+	2,063	24%	24%
Total	8,448	100%	

Table 4 Number of Entire Home/apt listings by the number of Entire Home Listings the “host” operates.
Almost half of entire home listings are part of a property portfolio.

Inside Airbnb: WA. Distribution of Entire homes/apts by number managed by Host

12/2018

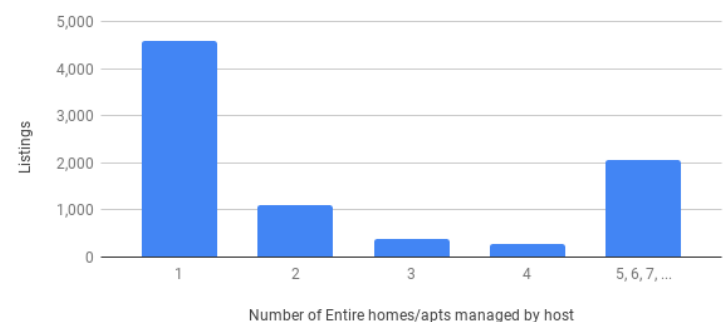


Figure 6 Number of Entire Home/apt listings by the number of Entire Home Listings the “host” operates.
Almost half of entire home listings are part of a property portfolio.

“Almost half (46%) of Entire home Airbnb listings are part of a property portfolio.”

Platform for Licensed/Legitimate Accommodation?

When W.A. Airbnb hosts self-select the “property type” for their listing, a majority (73%) select a property that appears to be a normal residential property; and not a licensed hospitality establishment like a “Bed and breakfast”, “Hostel”, “Boutique hotel” or “Hotel”.

Frequently, advocates for the deregulation of short-stay accommodation state that they are not impacting residential communities because many licensed hospitality providers are using short-term stay platforms like Airbnb.

The data shows that in W.A., platforms like Airbnb are competing with established (regulated) hospitality providers, using residential properties to do so.

Property Type	Entire home/apt		Private room		Shared room		Total	
	#	%	#	%	#	%	#	%
House	3,581	42.4%	1,962	55.4%	65	50.4%	5,608	46.3%
Apartment	2,399	28.4%	348	9.8%	11	8.5%	2,758	22.8%
Townhouse	392	4.6%	128	3.6%	3	2.3%	523	4.3%
Bed and breakfast	23	0.3%	460	13.0%	11	8.5%	494	4.1%
Guesthouse	340	4.0%	64	1.8%	1	0.8%	405	3.3%
Guest suite	269	3.2%	118	3.3%			387	3.2%
Cottage	312	3.7%	21	0.6%			333	2.7%
Villa	247	2.9%	66	1.9%	2	1.6%	315	2.6%
Bungalow	157	1.9%	61	1.7%	2	1.6%	220	1.8%
Condominium	153	1.8%	29	0.8%	1	0.8%	183	1.5%
Chalet	176	2.1%	7	0.2%			183	1.5%
Farm stay	88	1.0%	15	0.4%	1	0.8%	104	0.9%
Serviced apartment	70	0.8%	10	0.3%			80	0.7%
Other	34	0.4%	39	1.1%	2	1.6%	75	0.6%
Cabin	62	0.7%	9	0.3%	2	1.6%	73	0.6%
Hostel	1	0.0%	41	1.2%	25	19.4%	67	0.6%
Loft	56	0.7%	6	0.2%			62	0.6%
Boutique hotel	1	0.0%	50	1.4%			51	0.5%
Nature lodge	1	0.0%	36	1.0%	1	0.8%	38	0.4%
Earth house	26	0.3%	6	0.2%			32	0.3%
Camper/RV	18	0.2%	7	0.2%			25	0.3%
Tent	7	0.1%	12	0.3%			19	0.2%
Hotel			16	0.5%			16	0.2%
Others (combined)	35	0.4%	31	0.9%	2	1.6%	68	0.1%
Total	8,448	100.0%	3,542	100.0%	129	100.0%	12,119	100.0%

Table 5 Airbnb Listings by Room and Property type in W.A. at 12/2018.

Most Airbnb listings are in residential properties.

Impact (on Housing)

The data and maps on the following pages highlight where short-term stay listings are at their largest scale, both in terms of absolute numbers and in comparison to the number of private dwellings in each of W.A.'s Local Government Areas (LGA).

Short-stay accommodation in residential dwellings compete with housing used by essential workers and families living in a community. Frequently the most vulnerable members of the community are renters.

To quantify the impact on renters and the cost of rental housing, the number of Commercial Entire home listings has been compared to Rental stock, again in each of W.A.'s LGA's.

Researchers around the world have shown that short-stay accommodation in areas under housing pressure both displace residents and drive up the cost of housing.

In some LGA's Airbnb Entire home Listings make up almost 10% of Housing Stock and commercial Entire home Listings make up more than 40% of Rental Stock.

Also, in some cases, especially in higher density towns or cities, the impact of short-stay platforms can be isolated to particular neighbourhoods, or even apartment buildings, so more detailed statistics might be required to understand the local impact.

Simply comparing the number of short-term stay accommodation to the total number of housing units (especially across a broad area, like an entire state) is usually inadequate.

Quality of Life Concerns are the Tip of the Iceberg

An important note on the impacts of short-stay accommodation, is that issues frequently reported in the media, or in complaints to the local councils, such as undesirable behaviour by guests, lack of parking, increased garbage etc, are **symptoms** of the residential properties being used for a commercial activity.

Consumer protection and Codes of conduct do not address the root cause of the issue with short-stay accommodation, which is incompatible use of residential property.

“In some W.A. LGA's Airbnb Entire home Listings make up almost 10% of Housing Stock and commercial Entire home Listings make up more than 40% of Rental Stock.”

LGA	Total Housing Stock	Rental Stock	Number of Entire Home Listings	% of Total Housing Stock	Number of Commercial Entire Home Listings	% of Total Housing Stock	% of Rental Stock
BUSSELTON	18,753	3,516	1,107	5.9%	800	4.3%	22.8%
AUGUSTA-MARGARET RIVER	7,799	1,424	734	9.4%	578	7.4%	40.6%
FREMANTLE	14,594	3,842	541	3.7%	357	2.4%	9.3%
PERTH	13,415	5,637	515	3.8%	410	3.1%	7.3%
STIRLING	96,610	26,164	491	0.5%	249	0.3%	1.0%
MANDURAH	40,788	8,138	370	0.9%	196	0.5%	2.4%
VINCENT	16,841	5,440	260	1.5%	168	1.0%	3.1%
JOONDALUP	60,348	9,079	250	0.4%	120	0.2%	1.3%
SOUTH PERTH	20,231	5,943	191	0.9%	116	0.6%	2.0%
SUBIACO	9,866	3,531	188	1.9%	152	1.5%	4.3%
ALBANY	16,926	3,672	186	1.1%	120	0.7%	3.3%
MELVILLE	41,280	7,683	180	0.4%	113	0.3%	1.5%
WANNEROO	70,352	13,675	171	0.2%	82	0.1%	0.6%
COTTESLOE	3,634	805	165	4.5%	102	2.8%	12.7%
BELMONT	18,457	5,988	165	0.9%	124	0.7%	2.1%
ROCKINGHAM	50,929	10,908	157	0.3%	76	0.1%	0.7%
VICTORIA PARK	16,949	6,002	156	0.9%	113	0.7%	1.9%
DENMARK	3,376	528	150	4.4%	101	3.0%	19.1%
BROOME	8,857	2,969	134	1.5%	90	1.0%	3.0%
BAYSWATER	29,903	7,908	132	0.4%	84	0.3%	1.1%
CANNING	35,683	8,944	122	0.3%	84	0.2%	0.9%
GINGIN	3,890	321	116	3.0%	69	1.8%	21.5%
COCKBURN	42,856	8,988	114	0.3%	58	0.1%	0.6%
CAMBRIDGE	10,771	2,010	111	1.0%	58	0.5%	2.9%
ESPERANCE	6,642	1,398	107	1.6%	78	1.2%	5.6%
SWAN	51,418	9,597	100	0.2%	52	0.1%	0.5%
GREATER GERALDTON	17,538	4,251	99	0.6%	71	0.4%	1.7%
NORTHAMPTON	2,613	377	95	3.6%	66	2.5%	17.5%
GOSNELLS	44,408	8,884	94	0.2%	52	0.1%	0.6%
MANJIMUP	5,046	878	90	1.8%	64	1.3%	7.3%
DANDARAGAN	2,956	289	89	3.0%	60	2.0%	20.8%
BUNBURY	15,440	4,311	75	0.5%	51	0.3%	1.2%
MURRAY	7,842	1,203	64	0.8%	33	0.4%	2.7%
MOSMAN PARK	4,073	1,125	60	1.5%	31	0.8%	2.8%
EXMOUTH	2,417	486	56	2.3%	49	2.0%	10.1%
CAPEL	6,656	1,234	54	0.8%	25	0.4%	2.0%
NEDLANDS	8,353	1,507	48	0.6%	22	0.3%	1.5%
HARVEY	10,977	1,913	48	0.4%	31	0.3%	1.6%
EAST FREMANTLE	3,281	590	48	1.5%	24	0.7%	4.1%
MUNDARING	14,658	1,493	47	0.3%	24	0.2%	1.6%

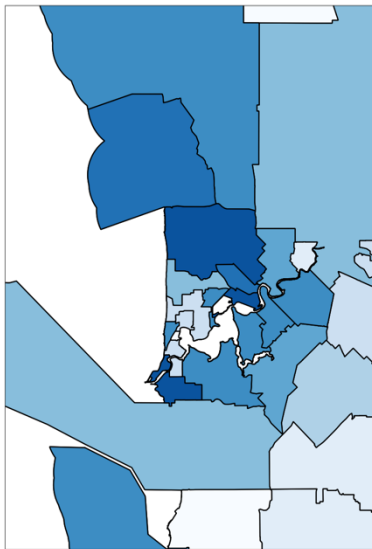
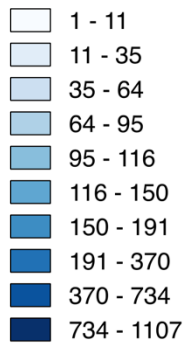
Table 6 Top 40 W.A. LGA's. Entire Home Listings and Commercial Entire Home Listings compared to Housing and Rental Stock.

In some LGA's Airbnb Entire Home Listings make up almost 10% of Housing Stock. Commercial Entire Home Listings can make up more than 40% of Rental Stock.

Source/Notes: Top 40 W.A. LGA's; Housing and Rental Stock, ABS 2016. More data on other LGA's are available by request, or for public download at www.insideairbnb.com/get-the-data.htm

Legend

Number Entire Home/apt Listings



Perth and Region Zoom

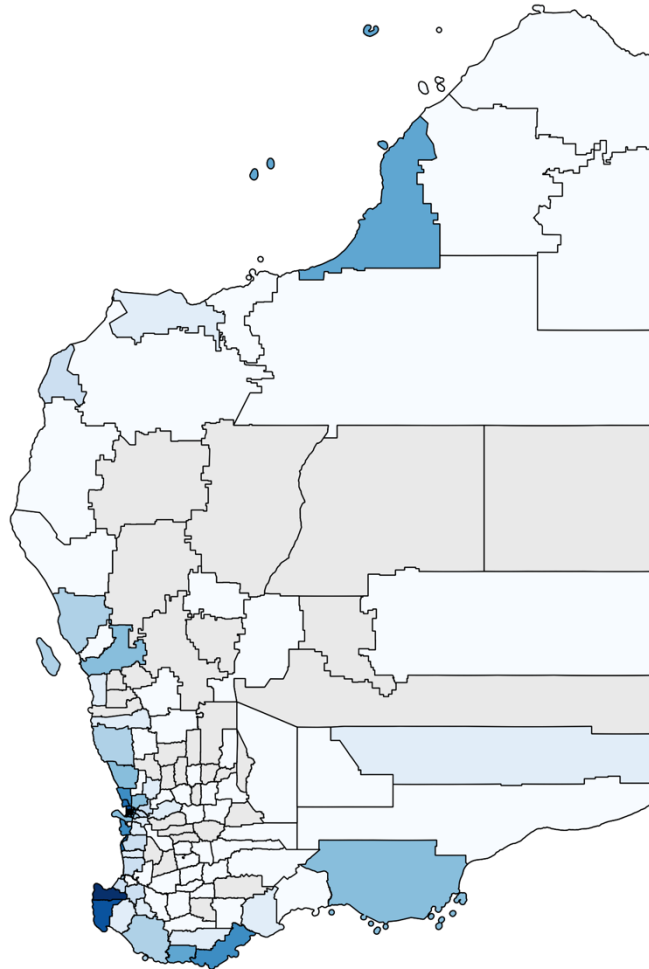
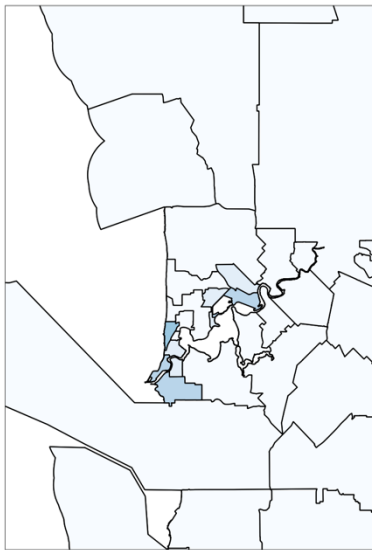
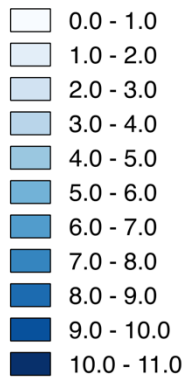


Figure 7 Number of Entire Home Listings by LGA

Source: ABS 2016

Legend

Entire Homes as % of Housing Stock



Perth and Region Zoom

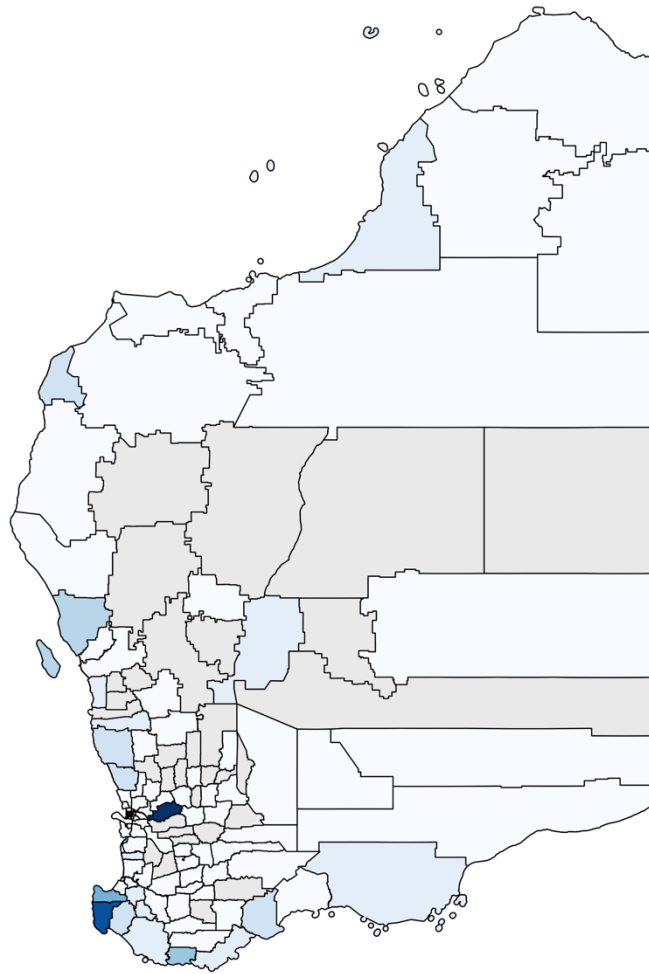
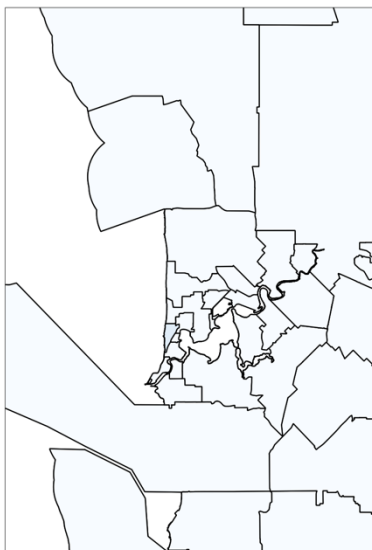
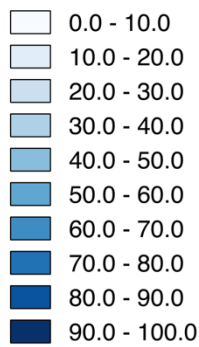


Figure 8 Number of Entire Home Listings as a Percentage of Private Housing Stock, by LGA

Source: ABS 2016

Legend

Commercial Homes as % of Rental Stock



Perth and Region Zoom

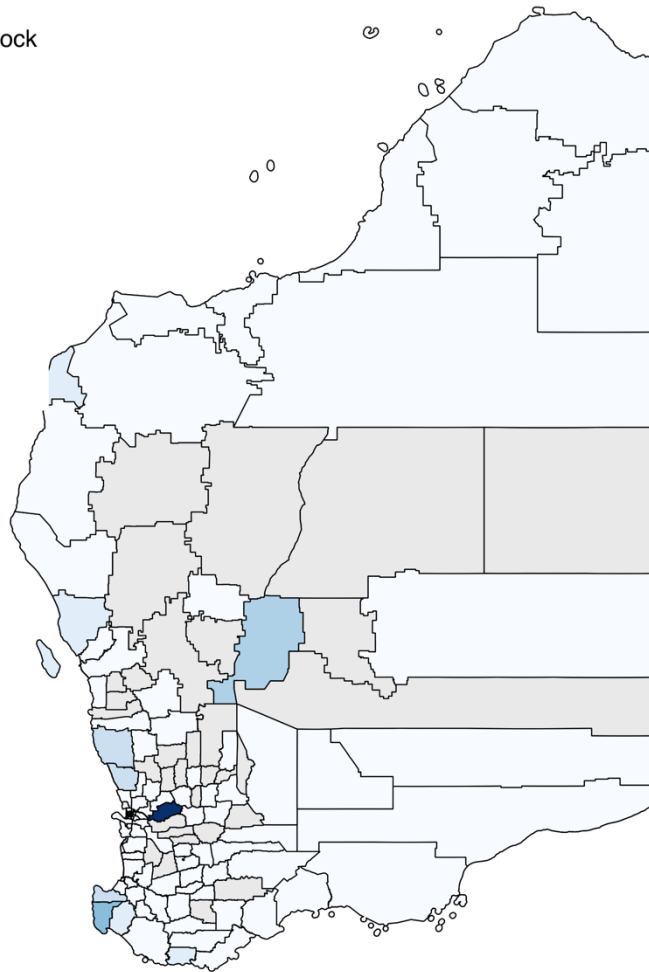


Figure 9 Number of Commercial Entire Home Listings as a Percentage of Rental Stock, by LGA

A Commercial Entire home is estimated to be rented ≥ 90 nights per year, or belongs to a host that has more than 1 Entire home listing. These are thresholds used by many policy makers to define commercial use, and behaviour most likely to displace residents.

Source: ABS 2016

Policy Analysis

Policy Background

Internet based short-stay accommodation platforms like Airbnb have now existed for more than 10 years. Despite some time since their founding, tens of thousands of regions, cities and towns are still struggling with the impacts of short-stay accommodation and challenges of creating appropriate and effective regulations.

Some of the key barriers to dealing with impacts and a policy response include

- The ability of internet platforms' supply to scale quickly to a level not seen before, in neighbourhoods that had never seen short-stay accommodation activity
- Hundreds of millions spent in advertising and lobbying for de-regulation by short-stay platforms
- Platforms' access to policy makers at a level not available to community activists
- Misinformation about the true nature of the short-stay activity
- Obscuring identities and locations of operators so that it is difficult or impossible to enforce regulations
- Platforms that are not accountable to laws
- Law suits, or the threat of law suits in response to new legislation

Cities that have had success in regulating the short-stay are opting for regulations that include:

- A permit system to ensure that
 - hosts are operating only in properties that meet specific criteria defined by policy makers
 - listings on the Internet can be linked to the regulator's information about the property and operator (some jurisdictions make this information publicly available for transparency)
- Platform accountability to ensure only listings that have a permit are allowed to operate
- Data reporting by the host or platform to further ensure compliance
- Although not universal, some jurisdictions require inspections

Examples of limits that allow short-stay activity to minimize impact on residential communities and maintain consistency of zoning, tax credits, leases, and building by-laws include

- Proof of primary residency, or the permission of body corporates or landlords
- Notifications to neighbors
- Bans on entire home listings, or yearly caps to limit full-time use
- Limits on the number of guests that can stay in a property
- Restrictions on buildings that have received residential or affordable housing subsidies
- The presumption of opt-out for apartment building operators or body-corporates

San Francisco

San Francisco is a perfect example of a city that has introduced effective legislation. It struggled for many years with affordable housing being diverted to tourist use and started with a permit system that was characterized as completely ineffective¹.

In January 2018, when a series of progressively more restrictive, accountable and effective laws were introduced, the number of Airbnb listings dropped by more than half.

San Francisco is the “home” of Airbnb, however any idea of cooperation or self-regulation was non-existent - the company resisted regulations every step of the way.

The key characteristics of the San Francisco model are:

- City Issued Permit (with pass-through registration from platforms)
- Platform must display permit # (US\$1,000/listing/day fine)
- Only one permit per housing unit
- Proof of primary residency, permission from landlord
- 90-day yearly cap for unhosted stays
- Host must provide quarterly reports
- Notifications to landlord, building, neighbours
- City can issue administrative subpoenas to platforms to investigate illegal use

San Francisco: The effect of enforceable and accountable regulations



Figure 10 The effect of enforceable regulations in San Francisco.

¹ Compliance rates were as low as 10%. Even the CEO of Airbnb, Brian Chesky, did not apply for a permit for his San Francisco based Airbnb listing, even though it was required by law.

https://sfist.com/2016/01/14/airbnb_ceo_hasnt_registered_own_airbnb/

Australian Legislation

Recently adopted or expected regulations in Australia have been characterized as “world-class”, however this is far from the reality. In most cases they legitimise short-stay use with few meaningful restrictions instead of protecting residents and residential communities.

Australian policies on short-stay accommodation are mostly moving in the opposite direction to the rest of the world, and policy makers should take a hard look at the experience of their international brethren.

Tasmania

The Tasmanian permit system has broad exemptions which allow many operators to avoid the scrutiny of the regulatory system. These include exemptions if

- the premises is used by the owner or occupier as their main place of residence, and only let while the owner or occupier is on vacation or temporarily absent; or
- (ii) the premises is used by the owner or occupier as their main place of residence, and visitors are accommodated in not more than 4 bedrooms.

Tasmania also has no platform accountability or data disclosure requirement.

New South Wales

New South Wales’s recent policies and legislation are equally permissive

- There is an over-focus on “bad behaviour” and consumer protection, instead of aligning laws with residential zoning
- A cap of NO LESS than 180 nights, effectively incentivizing short-stay use in all properties across the state, and subjecting buildings and neighbourhoods to tourist activity NO LESS than half the year
- Requiring buildings to opt-out of short-stay use with 75% votes. This is undemocratic, as it allows 25% of residents to permit tourist use of a residential building, and converts all residential building to de-facto hotels, incompatible with residential zoning and by-laws.

Policy Recommendations

Based on my data-driven analysis and familiarity of policy approaches around the world, the following policy framework should be considered for short-stay accommodation in Western Australia:

- 1. A permit system to ensure that hosts are operating only in properties that meet specific criteria**
- 2. Platform accountability ensuring that all internet listings have permit numbers displayed, to ensure compliance, with penalties for hosts and platforms for non-compliance**
- 3. Data reporting by the host or platforms to allow measurement of the industry and to further ensure compliance**
- 4. Statewide laws should be restrictive (see proposed restrictions below), with the ability of some councils to opt-out with more permissive use, as opposed to a permissive statewide approach**

Specific state-wide restrictions should include

- 1. No short-stay use in apartment buildings unless the by-laws are written or changed to allow them**
- 2. All short-stay use to require proof of primary residency (owner occupier, or tenant with permission)**
- 3. Yearly restrictions on entire home short-stay accommodation allowing no more than 90-days rental per year**
- 4. Limits on the number of rooms/guests for hosted stays to provide differentiation from a “Bed and Breakfast”**

About Inside Airbnb and This Response

Inside Airbnb was founded in 2015 by Australian housing and data activist, Murray Cox, who lives in New York City.

Inside Airbnb is a mission driven project to provide data that quantifies the impact of short-stay accommodation on housing and residential communities; and also provides a platform to advocate for appropriate and effective policies and/or regulation to protect our communities from the impacts of short-term rental of residential properties.

The data available in this response and from Inside Airbnb is compiled from public information displayed on the Airbnb web-site, and is being used by cities, urban planners, journalists, academics and researchers around the world.

The data has been downloaded hundreds of thousands of times and used in hundreds of academic studies. Murray has worked directly with cities such as the City of New York, San Francisco, Paris, Barcelona, Amsterdam and many others.

Frequently short-stay platforms attempt to discredit any independent research and data or link any analysis and criticism of their business to their competitors in the hospitality industry. These claims and their complaints about “fake data” should be taken as evidence of their sole objective to “win at all costs”.

This response is independent and was not commissioned, requested or supported in any way by industry players.