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New Platform Tourism Services (or the so-called Sharing Economy)

Understand, Rethink and Adapt

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New Platform Tourism Services (or the so-called Sharing Economy) – Understand, Rethink and Adapt
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Foreword

We are living in the era of travel. International tourism continues to grow strongly despite global challenges. In 2016, the number of international tourist arrivals reached 1,235 million, a 4% increase over 2015. This represents the seventh consecutive year of robust growth in international tourist arrivals. A comparable sequence of growth has not been seen since the 1960s. Data for the first four months of 2017 confirm this trend, with international tourist arrivals increasing by 6%.

Alongside tourism's continued growth in recent years we have also witnessed a shift in business models and consumer behaviour, mainly as a consequence of the global economic crisis, advances in technology and the emergence of digital platforms. Increasing entrepreneurship and the driving role of consumers have taken centre stage with the rise of new platform tourism services, often referred to as the sharing economy.

UNWTO defines new platform tourism services as business models in which private individuals offer tourism goods or services to visitors through digital platforms. They span the tourism segments of information, accommodation, transport, gastronomy and other tourism activities.

While we welcome the innovation and convenience of these platforms, we must underline the need for the sector to find creative solutions to safeguard consumer rights and quality standards while ensuring fair competition for all businesses. On the other hand, destinations and companies must adjust their policies

and strategies to these changes in the market in order to remain competitive.

In this respect, we have identified three main directions in the way forward: understanding and monitoring the new platform tourism services; rethinking regulation and addressing the interests of all stakeholders involved – tourists, workers, providers, platforms, competitors, and local communities; and, finally, adapting to the market changes based on a 4C approach – communication, collaboration, cooperation and coordination.

By addressing these issues, tourism providers and destinations will be able to adapt to the challenges of new platform tourism services and adopt a differentiated approach, tailored to their specific needs.

I trust that this report provides useful insight about the new platform tourism services and that it contributes to the ongoing discussion and spirit of collaboration among stakeholders. I encourage travellers, service providers, platforms and authorities around the world to contribute to this discussion and to continue working together so that well-informed policies can be considered and agreed upon for the benefit of all.

Taleb Rifai,
Secretary-General, World Tourism Organization (UNWTO)

Executive summary

The provision of services and products by private individuals in tourism is not a new phenomenon and has existed since the birth of tourism. In recent years however, its exponential growth and diversification through digital platforms has led to the creation of new business models, sparking an intense debate on its value and challenges for the tourism sector.

The rise of global digital platforms has provided private individuals and commercial suppliers new opportunities to offer services and products in the areas of tourism information, accommodation, transport, food and other tourism activities to an extent previously unknown. What began as the sharing of private assets and services through online platforms, usually referred to as sharing or collaborative economy, has become today a central and controversial topic in the sector as it evolved much beyond the simple sharing of private products and services. This appears to be a natural step in a market needing to adapt to constant changes brought about by technological advances and shifts in consumer behaviour. Indeed, market changes leading to adaptation and new forms of regulation are not something new.

Considering the implications of the above, UNWTO proposes to use a new concept – that of *new platform tourism services* – defined as business models in which products or services are offered to visitors through digital platforms. These products or services can be offered by private individuals or by commercial entities and distributed (intermediated) via digital platforms that match demand and supply.

Many terms and definitions have been proposed to describe this phenomenon, but beyond its conceptualization the main purpose is to identify the key trends and challenges arising from these new platform tourism services, while providing insight into their current benefits and future importance.

This report aims to gather further evidence on these new platform tourism services across destinations worldwide, in five main areas – information, accommodation, transport, food and 'things to do' or tourism activities. The study aims to gain a better understanding of how this phenomenon is shaping the tourism sector, to identify the specific opportunities and challenges it poses, and to assess possible actions and the way forward. To do so, besides desk

research, UNWTO has conducted a survey among its Member States, Affiliate Members and a selection of 250 destinations, about the importance and impact of these new tourism services on their market. A total of 114 responses were received from organizations across all world regions.

The following key findings emerged from this research project:

1. **New platform tourism services are important and are expected to continue growing in importance in the coming decade**. Of the five areas (information, accommodation, transport, food and other tourism activities) identified in new platform tourism services, information and accommodation appear to be the most relevant today, followed by transport services. Food and other tourism activities remain somewhat behind in terms of current importance;

2. **Despite the challenges, the positive impact of new platform tourism services outweighs its negative effects**. Although there are several challenges to be addressed, the majority of studies and examples, as seen in most responses to the survey, indicate that the positive effects of the new platform tourism services outweigh the negative impacts; and

3. **The opportunities generated should not distract from the pressing need to address the economic, social or environmental challenges created by the new platform tourism services**. Doing so requires a comprehensive approach, where four governance areas are identified as key pillars: (i) planning and sustainability; (ii) fair competition; (iii) consumer protection; and (iv) labour conditions.

Looking forward, three main paths have been identified:

1. **Understanding and monitoring**: a better understanding and monitoring of the new platform tourism services is necessary to assess the size and structure of the market, as well as the governance measures taken worldwide. In this sense, access to data and effective measurement become essential in moving forward. Recent cooperation between relevant authorities and digital platforms are a first step in this direction;

2. **Rethinking regulation**: regulating according to the needs and situation of each destination is crucial to maintain or establish a level playing field and guarantee fair competition, as well as to avoid risks for consumers, workers, service providers and digital platforms. In order to ensure that new platform tourism services positively affect the management and reputation of a destination whilst protecting visitors and local communities, authorities should distinguish between:

   a) Services that **do not generate an economic benefit** beyond the recovery of costs and generally involve only occasional economic transactions, which can be considered as *true sharing*; and

   b) Services that **generate an economic benefit** beyond the recovery of costs and generally involve frequent or systematic transactions, which can be considered a *commercial activity by private persons or entities.*

The latter generally works in the same way as a commercial business and should be treated as such. At the same time, it is important to acknowledge that this distinction is not always clear-cut in practice, as most platforms offer both *true sharing* and *commercial activities*. To avoid over-regulation and prevent choking off the supply, regulation has to be tailored and be specific to each case and situation; and

3. **Adapting to the new platform tourism services based on a 4C approach** – communication, collaboration, cooperation and coordination. It is evident that the so-called sharing economy is there to stay and rather become ever more relevant, so it is essential to promote communication, collaboration, cooperation and coordination between all groups of stakeholders. By increasing collaboration efforts such as the ones mentioned in this study, destinations, as well as established tourism operators can work together with platforms in order to mutually benefit from the opportunities generated.

Altogether, new platform tourism services offer opportunities for providers, both individuals and commercial entities, as well as for destinations, as long as planning and sustainability, fair competition, consumer protection and labour conditions are considered and addressed.

To better manage the increasing presence of new platform tourism services, it is essential to better understand and measure it. In order for governments and other tourism authorities to protect visitors, workers and local communities, and ensure a level playing field, collaboration and the sharing of best practices and experiences is the best way forward. Rethinking regulations and guaranteeing that appropriate enforcement mechanisms are in place, are also vital to ensure that the tourism sector can reap the benefits of the new platform tourism services while addressing its emerging challenges.

Introduction

The emergence of new tourism products and services through digital platforms – often referred to as the sharing economy, collaborative economy or peer-to-peer (P2P) economy – has been welcomed by both visitors and the providers of these services alike. However, this development has also raised questions and growing concerns amongst traditional operators and destinations. Whilst these new business models have a significant potential to offer innovative services, often at lower prices, creating new products, employment opportunities and sources of income, as well as a more efficient use of resources, it has also raised issues of unfair competition, consumer protection and the labour conditions of employees and the self-employed, as well as negative consequences on local communities.

This research provides a first step towards enhancing the understanding of this phenomenon in tourism by putting it into the context of development and change. As the new platform tourism services continue to grow rapidly, it becomes increasingly important to examine its implications at a global scale. This study seeks to understand the importance of this phenomenon worldwide, the various issues it raises, and whether these are being addressed and how. In order to gather evidence, the World Tourism Organization (UNWTO) launched a survey in which its Member States and Affiliate Members, as well as a selected number of destinations (250), have been invited to participate. This study draws on the responses to the survey and aims to identify the different opportunities and challenges at stake, as well as the areas of and issues relating to governance arising from these.

Despite a major difficulty in the very conceptualization of the so-called sharing economy, it is evident that in recent

years these services have been expanding rapidly and impacting the tourism sector. In fact, this phenomenon is not only limited to tourism but is also found in many other areas of social and economic activity. With regard to the tourism sector, the growth of these platforms has mainly developed in the fields of information, accommodation, transport, food, and other tourism activities.

With the aim of providing further empirical evidence, this exploratory study offers a global overview of the current situation, effects and future relevance of these platform services in each one of the five aforementioned fields. Whilst acknowledging the complexity of the topic and the need to adopt a tailored approach for each situation, this study also seeks to contribute to the discussion on the way forward.

Methodology

The UNWTO Secretariat conducted a survey on the emergence of new platform tourism services. UNWTO Member States and Affiliate Members, as well as a selected number of destinations (250), were invited to participate in the survey. 114 respondents from all around the world replied. Answers were collected electronically. The majority of questions were open-ended, inviting respondents to share their experiences, study results and actions implemented. The survey was conducted globally and the regions in this report refer to the UNWTO regions.

More details on the methodology and respondents' profiles can be found in the Annexes.

1.

Tourism development and change

Tourism, like society and the economy, is constantly evolving under the influence of, and often thanks to, many external factors. Following a comprehensive STEEPLED analysis, the **s**ocial, **t**echnological, **e**conomic, **e**nvironmental, **p**olitical, **l**egal, **e**thical and **d**emographic factors that drive change can be identified.

As a result of change and innovation, the tourism landscape has been continuously evolving in recent decades with, for example, the appearance of airline alliances, the incorporation of low-cost airlines, dynamic pricing and yield management, paperless travel through electronic ticketing and check-in, online travel agencies, all-inclusive resorts, time-share properties, boutique hotels, wellness, themed holidays, the Chinese tourism boom, the mega-hubs in the Middle East, the cruise boom, the experience economy, storytelling, and so forth.

Whilst technology is one of the major factors driving tourism growth, it is by no means the only one. The growth of tourism has only been possible thanks to the development of the various means of transport and infrastructure, enabling greater capacity, higher speed, and more comfort and safety when travelling, thus lowering the cost of travel. Both step changes and incremental changes have shown an evolution from horse and sailing boat to jet plane. Technology also plays a key role in the evolution of buildings (heating and cooling systems, lighting, elevators, the use of sound and images, cleaning methods, etc.), swimming pools, attractions, food preparation, facilitation, safety and security, etc.

Generally, change is an important driver of growth, as it can result in, inter alia, effects such as:

- Incorporation of new products, markets and segments and the transformation of existing ones;
- Offering of new, different, better or better value for money products and services;
- Increase in choice, further differentiation, diversification and sophistication;
- Enhanced user experience;
- Use of economies of scale and lower costs;

– Increased labour productivity; and

– Increased competitiveness.

Overall, change can be a major source of market growth and in addition can lead to greater inclusiveness (i.e., by opening up participation in tourism to a broader section of society), enable more frequent trip-taking, and offer opportunities for new entrepreneurs to enter the marketplace. However, change also can be disruptive for traditional operators, as they might become less relevant or even obsolete, and hence may need to adapt in order to survive.

1.1 Connecting the world

In recent decades, the development of information and communications technology (ICT) has probably been the single biggest driver of change. The combination of telecommunications, computers, databases, networks, Internet, mobile phones, wireless technology, global positioning systems and smartphones has, amongst other things, facilitated the development of effective platforms to connect people and businesses, exchange information and execute transactions. For both public entities and private companies alike, it offers an indispensable and very powerful tool for management, logistics, distribution and marketing. ICT underpins many industries, such as the banking sector, which uses ICT for accounts and financial transactions, or the manufacturing sector which uses it for production, and retail for sales. Some other industries have been radically transformed by ICT development, such as the media and entertainment sectors.

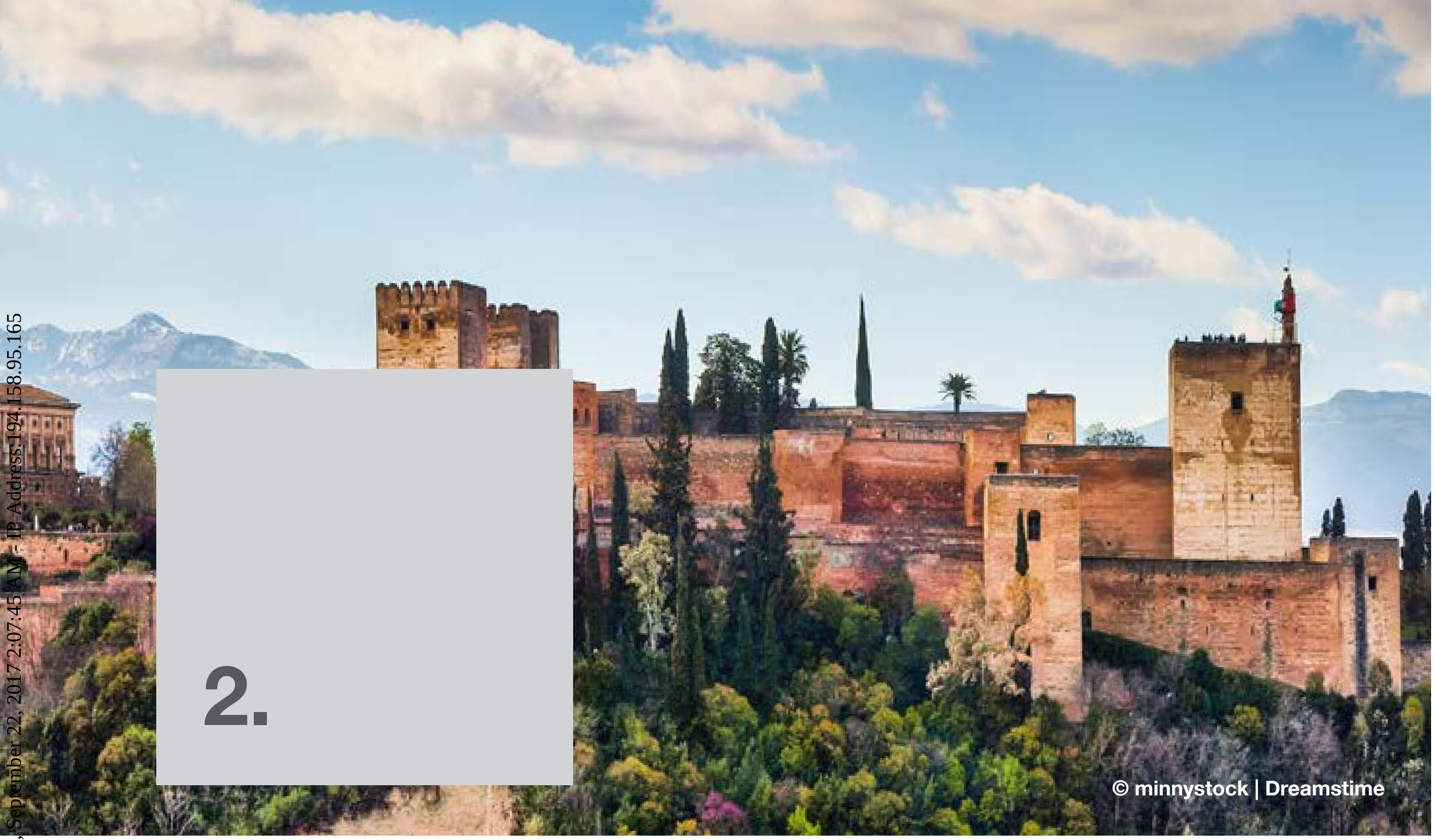
Tourism companies have been amongst the first to tap into the possibilities offered by ICT. Indeed, tourism and ICT are an excellent match, since tourism is more of a virtual than a physical product which only becomes tangible at the end of the process, when the traveller actually travels. The airline industry has been one of the main pioneers in developing automated computer reservation systems (CRSs) that evolved into global distribution systems (GDSs) in the 1970s and 1980s, facilitating the management of reservations and sales in the field of air travel, hotel rooms, rental cars, package tours, inter alia, through companies such as Sabre, Amadeus and Galileo.

1.2 Tourism and the platform economy

With the spread of the Internet in the 1990s, a communications infrastructure became available that quickly connected billions of users. Whereas in the past electronic transactions were predominantly conducted from business-to-business (B2B) through a dedicated infrastructure, the Internet added the possibility for businesses to directly connect to and transact with customers (B2C).

Among the first companies in tourism to exploit the Internet as a platform to connect supply and demand were the online travel agencies (OTAs) and booking engines, such as Expedia, booking.com and Rumbo. In some instances, these were virtual extensions of existing physical businesses, but in others they were start-ups, new entrants in the tourism sector originating from tech firms or companies linked to the GDSs bypassing the travel agencies they used to work with. Also, most airlines and hotel chains opened up to direct sales via the Internet, bypassing intermediaries. Additionally, B2C services that were previously covered only to a very limited degree, started to be offered through the Internet, such as TheFork or BeMyGuest which opened up the areas of online reservations for restaurants and activities, respectively.

The rapid evolution of ICT gave rise to many new opportunities resulting from the combination of digital platforms, mobile technology and smartphones, user-generated content, reviews and feedback, the integration with social media, the incorporation of global positioning services (GPSs), and the use of big data and artificial intelligence.



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2.

New platform tourism services: is it really sharing?

The supply of tourism products and services through digital platforms – often referred to as the sharing or collaborative economy – can be understood as sharing information, assets and services in community-based peer-to-peer (P2P) networks. There are several terms which are used interchangeably with the term sharing economy. They include, but are not limited to, the collaborative economy, collaborative consumption, peer-to-peer (P2P) economy, consumer-to-consumer (C2C) economy and participative economy. The underlying idea of transactions between peers is that supplier and user are on a rather equal level and that the supplier is not a company, but generally a private person offering a product, service or information through an intermediary's platform. This offer can be material assets such as a house, a room or a car, as well as immaterial resources such as time and skills.

In the tourism sector, peer-to-peer activities have developed in five fields of activity (see table 2.1). The list of examples mentioned below is not a complete inventory, but a sample that includes popular platforms in all relevant fields of activity.

Table 2.1: Fields of activity of new platform tourism services

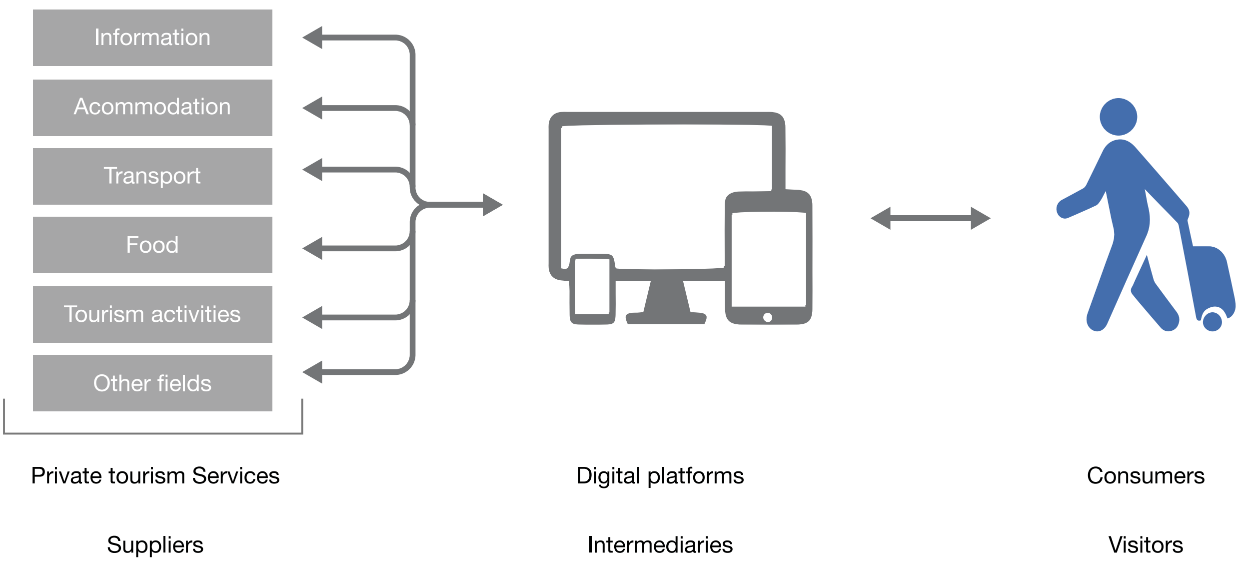
Field of activity	Description	Examples of digital platforms
Information	User-generated reviews, ratings and content for tourism(-related) services	TripAdvisor, Yelp, etc.
Accommodation	Short-term rentals of beds, rooms, apartments, homes, etc.	Airbnb, HomeAway, Couchsurfing, etc.
Transport	Short-distance ride-hailing, long-distance ride-sharing, and car-sharing services	Uber, Lyft, BlaBlaCar, etc.
Food	Communal dining or 'meal sharing' in a private environment	EatWith, Feastly, VizEat, etc.
Tourism activities	Guided tours and excursions, attractions and other activities	BeMyGuest, ToursByLocals, Vayable, etc.

Although the popularity of these services has been growing in recent years, understanding to what extent the exchange between private persons is really sharing or collaboration poses a significant challenge, and hence requires closer examination. In the tourism sector, the implications of the so-called sharing economy have been intensively debated, and many definitions have been used to describe this phenomenon. The nature of this phenomenon has created mixed responses from the relevant stakeholders, ranging from outright disputes to adoption and collaboration. Opinions are generally divided between those who refer to this as a private activity and those who consider it a regular professional activity.

For the purposes of this study, the new platform tourism services will be defined as business models in which private individuals offer goods or services to visitors through digital platforms that match demand and supply. The new platform tourism services include three categories of actors: service providers, digital platforms, and the users of these services or products (see figure 2.1). In addition, this type of provision implies an exchange between a private individual or a business/company, and in this context it is important to distinguish between:

- Services that **do not generate an economic benefit** beyond the recovery of costs and generally involve only occasional economic transactions, which can be considered as *true sharing*. For instance:
  - Sharing of opinions, reviews, ratings, comments, etc., as is the case with TripAdvisor (at least with regard to user-generated content);
  - Hospitality exchange via platforms such as Couchsurfing and HomeExchange.com;
  - The majority of longer-distance ride-sharing services on platforms such as BlaBlaCar; and
  - Part of home cooking and dining services on platforms such as EatWith, Feastly and VizEat; and
- Services that **generate an economic benefit** beyond the recovery of costs and generally involve frequent or systematic transactions, which can be considered a *commercial activity by private persons or entities*:
  - Part of the short-term rental of accommodation on platforms such as Airbnb and HomeAway;

Figure 2.1: New platform tourism services



- Short-distance transport services on platforms such as Uber and Lyft; and

- Part of the activities and experiences offered by platforms such as BeMyGuest, ToursByLocals, and Vayable.

For this latter category of commercial transactions, the sharing or collaborative economy is something of a misnomer, as activity generally takes the shape of a business, and needs to be recognised as such. However, this distinction is generally not as clear-cut in practice, as most platforms include both true sharing and commercial activities, and many also include offers from regular companies alongside privately-offered tourism services. Whether – or to what extent – it is actually *sharing* is very difficult to assess and remains a major challenge in the development of these services in the future.

2.1 Service providers

The term *service providers* refers to private individuals offering goods and services through digital platforms. These can be private individuals who share assets, resources, time and skills on an occasional basis, or regular service providers acting in a professional capacity. In the tourism sector, this occurs when individuals provide access to under-utilized goods and resources such as offering their home as accommodation, their car as means of transportation, or their knowledge to visitors. Whereas in a conventional business model a company provides access for consumers to company-owned property or other resources in peer-to-peer platforms can facilitate access for consumers to gain temporary access rights to another consumer's goods or competencies.[1] This shift from ownership towards accessibility is another characteristic of the new platform tourism services. Alongside these private individuals, the number of professional providers offering their assets and services through digital platforms has grown considerably over the years. Furthermore, the supply offered in most online platforms demonstrates that, across all domains of tourism, there is a difficulty in distinguishing between private assets and activities, and conventional business conduct. Although in some cases new suppliers do not intend to operate as a regular business, in others professional providers might be using the opportunity to be treated under the same conditions as private individuals. Categorizing these providers and assessing at what point an individual providing services on an occasional basis becomes a professional poses a challenge. In practical terms, there is a considerable grey zone between private and commercial providers, and it is this grey zone that causes most of the concerns related with the services in question. Frequently, not even the consumer will be able to distinguish whether the apartment rented is *private* or *commercial*, whether the car seat he or she pays for is in a private car or not, whether the attraction he or she books is a private venture or a business.

A number of reasons can be identified which help to explain the growing importance of private tourism service suppliers. Firstly, the number of private persons interested in supplying tourism products and services is rather large. Secondly, a large variety and wide range of products and services can be offered by a diversity of suppliers. For instance, the offer through Airbnb ranges from unused couches to luxury castles, or the ride-sharing offers through BlaBlaCar cover a large number of routes. Thirdly, the motivation to take part is varied. It might be driven by the wish to gain some (additional) income, but it might also fulfil a desire to meet and engage with people, to share knowledge and experience, to enhance people's lives, and to contribute positively to the world.

It is worthwhile noting that the private tourism offer is often not an entirely new phenomenon. For instance, private short-term rentals and private longer-distance transportation have existed long before the emergence of these new digital platforms, but were previously offered through personal networks or the bulletin board of the local supermarket, or via a classified advertisement in the local newspaper.

In relation to the existing commercial tourism offer, it is possible to observe that privately offered tourism products

[1] Dervojeda, K. et al. (2013), The Sharing Economy. Accessibility Based Business Models for Peer-to-Peer Markets, European Commission, Directorate-General for Enterprise and Industry, Brussels.

and services are not always the same as the existing products and services offered by traditional suppliers, and thus they can complement the regular offer.

Moreover, the offer is not always permanent, but often temporary, depending on the capacity and availability that private providers may have. Furthermore, additional supply can cushion demand in peak periods. For example, during the 2014 FIFA World Cup, Airbnb worked with the Brazilian Government in order to increase accommodation capacity in some Brazilian cities. Airbnb also partnered with the Rio 2016 Olympic Committee as an 'alternative official accommodation sponsor' of the 2016 Rio Olympics.[2]

2.2 Digital platforms

Digital platforms are intermediaries, connecting providers with users through an online platform, and facilitating transactions between them. In principle, suppliers and users can contact each other directly without the need for intermediaries. Digital platforms, however, enable providers to market services cost-effectively and with worldwide reach. In the tourism areas, digital platforms have been expanding rapidly across the various sectors of activity. The platforms function as intermediaries that aggregate offer which can be searched and filtered, facilitate transactions, allow the sharing of reviews and feedback, provide suppliers with a channel for marketing and promotion, and mediate in the case of disputes, and build confidence and trust between buyers and sellers alike.

Most of these platforms are created and administered by private companies, whether global companies such as Airbnb or Uber, or smaller ones operating at a national level. Likewise, most of these platforms do not exclusively provide tourism services from private individuals, but also from commercial entities. Platform companies predominantly act as middlemen, hence avoiding the risks and costs associated with the services offered, which instead lie with the providers of these services. For instance, drivers are responsible for their own cars and suppliers of accommodation are likewise responsible for their own apartments. Whilst there have been some small developments in this field, there is still a very large grey area in legal terms. As a result, in some cases private suppliers may not be aware of their obligations, rights and responsibilities.

Through these platforms new marketplaces are created, allowing services to be provided on a peer-to-peer or shared usage basis.[3] The new digital platforms in tourism tend to offer a mix of *true sharing* and commercial activities, and plain commercial offers. Thus, it would probably be incorrect to classify the whole operation of a given platform as either belonging to the private or non-private part of the market. There are platforms which typically facilitate private exchange (but also include commercial offers) and others which do not. However, it is not the platform that determines whether a transaction is a private or commercial exchange, but rather the supplier. In future debates it is important to acknowledge that, even though the goods or services are often provided by private individuals, in some destinations the commercial share of the portfolio is substantial and growing.

Digital platforms distributing products and services offered by private individuals exist in the marketplace alongside the regular platforms for traditional B2C transactions, such as the online travel agencies (OTAs). Boundaries between these two types of platforms, however, are increasingly less clear, as commercial offer is becoming incorporated in the former and true sharing in the latter.

The reviews and ratings provided by both customers and providers are an important feature of the platforms, and is valued by both customers and providers alike, as it helps people to make a better-informed choice, as well as increase trust and safety. The ability of platforms to provide trust between their service providers and users, especially between strangers, is crucial, and has significantly contributed towards consolidating the reputation and transparency of these platforms. On the other hand, certain issues can arise with regard to the accuracy and objectivity

2 Airbnb (2016b), Bringing More Travellers to More Places: Airbnb's Partnerships With Cities and Destination Managers (online), available at: www.airbnbcitizen.com/bringing-more-travelers-to-more-places-airbnbs-partnerships-with-cities-and-destination-managers/.
Airbnb (2016c), Olympics recap: Rio hosts champion hospitality (online), available at: www.brazil.Airbnbcitizen.com/olympics-recap-rio-hosts-champion-hospitality/.

3 Organisation for Economic Co-operation and Development (2016), 'Policies for the tourism sharing economy', in: OECD Tourism Trends and Policies 2016, OECD, Paris, pp. 89-120.

of the reviews by both suppliers and customers (ratings acceptance), or even give rise to discrimination by race, gender or otherwise. To this end, the World Committee on Tourism Ethics, an independent body working under the auspices of UNWTO, has recently prepared a document entitled *Recommendations on the Responsible Use of Ratings and Reviews on Digital Platforms*[4].

2.3 Visitors (consumers)

In general, visitors have welcomed the emergence of the new platform tourism services. Visitors have benefited from the innovation, convenience, broader choice and lower prices provided by these new platforms and have, as a result, been increasingly interested in using the services on offer.

The motivation from visitors to use the new platform tourism services varies. It is often argued that the growing demand is primarily price-driven. However, there are also other equally important factors at work here. For instance, it might well be argued that visitors' desire for a different type of experience with an increased interaction with locals, or allow them to search for something that better suits their specific needs or preferences. When travelling with young children, for example, it might be more convenient for visitors to stay in an apartment rather than in a hotel. In fact, the supply of tourism services through digital platforms can even broaden the range of options which otherwise might not have been available in the marketplace.

In the tourism sector, these services are likely to provide a preferable alternative across the different areas of activity. For instance, regular taxis do not generally facilitate sharing a ride with another client, whereas this is one of the options available with Uber or Lyft; visitors might prefer to share a room or a house if this enables them to travel and save money or cut costs. In longer distance ride-sharing like the services provided by BlaBlaCar, one might also be able to find a ride on a route that is not served by regular transport services, particularly in the case of more remote areas.

Another important motivation for visitors is the possibility to use globally recognized platforms when travelling in different countries. The convenience and flexibility of such services, as well as the forms of trust and verification they provide, are attracting more and more users. Safety and security can play an important role, in particular with taxi-type transportation as, in various countries, passengers may feel safer due to the fact that the driver and car are registered in the platform's system, the clear pricing system that cannot be easily manipulated, and the ratings and reviews system. However, the provision of tourism services through digital platforms is often not guided by the same rules that apply to regular businesses, which may give rise to consumer protection issues relating to quality standards, health and safety, privacy or equal treatment (non-discrimination policy). Lastly, as mentioned earlier, demand for these tourism services, specifically in the domain of *true sharing*, is also a reflection of a trend that values access to assets over ownership. Visitors are interested in taking greater advantage of asset sharing and of making a more efficient use of available resources.

2.4 Traditional tourism businesses

Traditional tourism businesses are those that operate within the existing regulatory framework, often through a government license. Over the years, and usually through associations, traditional businesses have repeatedly voiced some negative aspects of the so-called sharing economy in tourism. Unfair competition, possible threats to health and safety, tax evasion, environmental obligations and liability issues have all been identified by incumbent industry operators as key concerns that need to be addressed.[5] Traditional businesses argue that new suppliers do not comply with the existing regulations and, thus, ask for action to level the playing field.

Having said that, it is important to note that there seems to be, however, a consensus among traditional businesses that there is little or no point in denying the expansion and popularity of these services in the tourism sector. At times, there has even been integration between traditional and new

4 World Committee on Tourism Ethics (2017), Recommendations on the Responsible Use of Ratings and Reviews on Digital Platforms, UNWTO, Madrid, available at: www2.unwto.org/press-release/2017-05-01/unwto-international-congress-ethics-presents-recommendations-responsible-us

5 Caribbean Hotel & Tourism Association (2016), The Caribbean Sharing Economy Resource Guide (online), available at: www.caribbeanhotelandtourism.com/chta-recommends-public-private-sector-solutions-to-regularize-the-sharing-economy/.
HOTREC (2017), Policy Priorities for a responsible and fair 'collaborative' economy (online), 14 February 2017, available at: www.hotrec.eu/policy-issues/sharing-economy.aspx.

services, where new business opportunities are created and developed through partnerships or joint ventures such as the partnership between Hilton Worldwide and Uber.[6]

Although the new platform tourism services are often in competition with conventional businesses, there might be cases where the supply of these services can bring benefits to all. In some cases, privately offered services can provide additional enhancements to the tourism experience that the traditional operators cannot provide.

On one hand, these services can enable tourists to enter into contact with locals, and provide a new type of tourism experience. In a similar way, the supply of private tourism services can help the sector to respond to peaks in demand when commercial capacity reaches saturation point. Some have also claimed that the new platform tourism services might contribute towards increasing tourism flows in less popular destinations, where the commercial offer is either non-existent or scarce. In addition, part of the private tourism offer is priced below the commercial standard. This can help to reach a segment of customers who would not use the commercial offer, simply for reasons of cost.

With this in mind, it may be claimed that private tourism services can complement the existing commercial services, both in terms of quality and price. Aside from its young age, it has been argued that many types of traveller segments are increasingly drawn towards using these services and therefore, the profile of consumers attracted to these services are becoming more diverse every day.[7] This complementary function can be advantageous for destinations, enabling them to reach new segments of customer demand. It is also important to highlight that the traditional market players also need to adapt and not remain static. In the longer-term, they must adapt their current approaches to reflect the new technological reality if they wish to continue to be competitive and relevant for today's visitor.

The uncertainty about the rights and obligations of those taking part in the so-called sharing raises the central question regarding under what conditions the new platform tourism services must operate. It is worthwhile emphasizing, however, that levelling the playing field does not necessarily mean more regulation (by way of including private suppliers into existing regulations), but can also mean rethinking the existing regulation for all.

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[6] Juul, M. (2017), Tourism and the sharing economy, Briefing, European Parliament, EPRS (online), available at: www.europarl.europa.eu/thinktank/en/home.html.
[7] Toposophy (2016), DMOs and the sharing economy: Taking the Leap (online), available at: www.toposophy.com/insights/insights/?rid=12.

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Importance and impact of new platform tourism services

In order to assess to what extent new tourism services through digital platforms are an issue and how this is dealt with in destinations around the world, UNWTO conducted a survey among tourism organizations or administrations, as well as representatives from the private sector, associations and academia. The survey asked respondents about the perceived current and expected future effects of these new services in their destinations, the opportunities and challenges, and governance issues related to planning and sustainability, fair competition, consumer protection and labour conditions. The questions covered five specific areas of tourism services: information (such as TripAdvisor), accommodation (such as Airbnb), transport (such as Uber or BlaBlaCar), food (such as EatWith) and tourism activities or 'things to do' (such as ToursByLocals). (See further details on the survey in Annex 1 and the survey questionnaire in Annex 2).

The survey comprised feedback from 114 respondents from all world regions, of which 52% from Europe, 23% from the Americas, 14% from Asia and the Pacific, and 11% from Africa and the Middle East. Two-thirds of the responses (66%) came from destination administrations or organisations, whether national, regional or local, and the remainder (33%) from the private sector, associations, academia or other institutions. See Annex 1 for further detail.

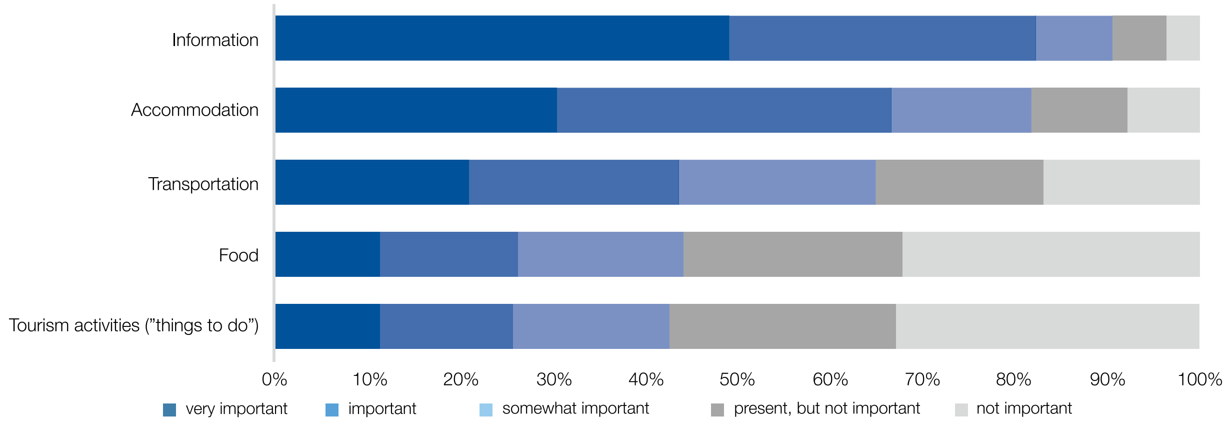
This chapter analyzes the quantitative results of the survey regarding the importance and impact of new platform tourism services in destinations. Chapter 4 looks at qualitative feedback from respondents on the opportunities and challenges of this phenomenon by area, as well as recommendations on the way forward. Chapter 5 addresses governance issues relating to these new platform tourism services.

3.1 Importance of the new platform tourism services

Of all five categories, 'information' services such as TripAdvisor or Yelp are perceived as the most important in their markets by respondents overall. Rating their importance on a five-point scale ranging from 'not present' to 'very important', almost half of respondents considered 'information' services as being 'very important', and one third as 'important'. Thus, more than 80% of respondents rated information services as 'important' or 'very important' in their markets (see figure 3.1).

Figure 3.1: Current importance of new platform tourism services (%)

Question B1: How do you rate the current importance of private tourism services through digital platforms for your activity/destination?



'Accommodation' services were considered the second most important, with 67% of respondents rating it as '(very) important', and 'transport' the third most important, with 44%. Both the categories of 'food' services and 'tourism activities' were considered less important overall, with less than a third of respondents rating them as '(very) important'.

By UNWTO regions, the Americas showed the highest percentage of respondents perceiving 'information', 'accommodation' and 'transport' services as 'important' or 'very important' (96%, 77% and 62% respectively). Africa and the Middle East recorded the highest percentage of 'important' and 'very important' responses in the category of food (38%), though the sample in this region is relatively smaller. In Africa and the Middle East, the other services are rated less important than in other regions of the world. Asia and the Pacific saw the highest percentage of '(very) important' responses in 'tourism activities' (38%).

Regarding the types of organizations, 'other organizations' from the private sector, tourism associations and academia showed the highest percentages of '(very) important' responses in all five areas of tourism services. Regional and local bodies showed a higher percentage of '(very) important' responses in the 'accommodation' services (64%)

Figure 3.2: Current importance of new platform tourism services (% of responses indicating 'important' or 'very important')

Question B1: How do you rate the current importance of private tourism services through digital platforms for your activity/destination?

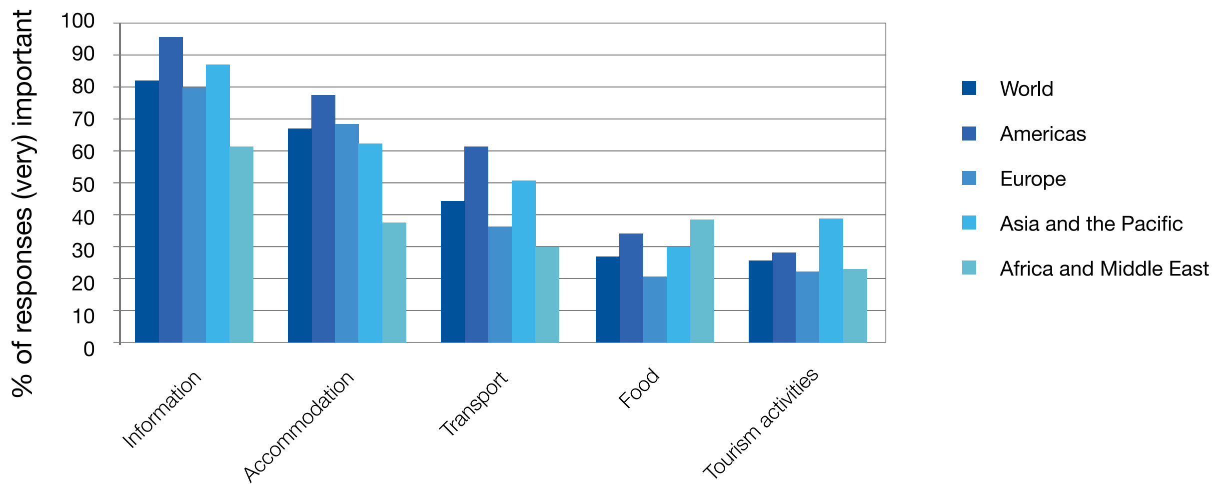
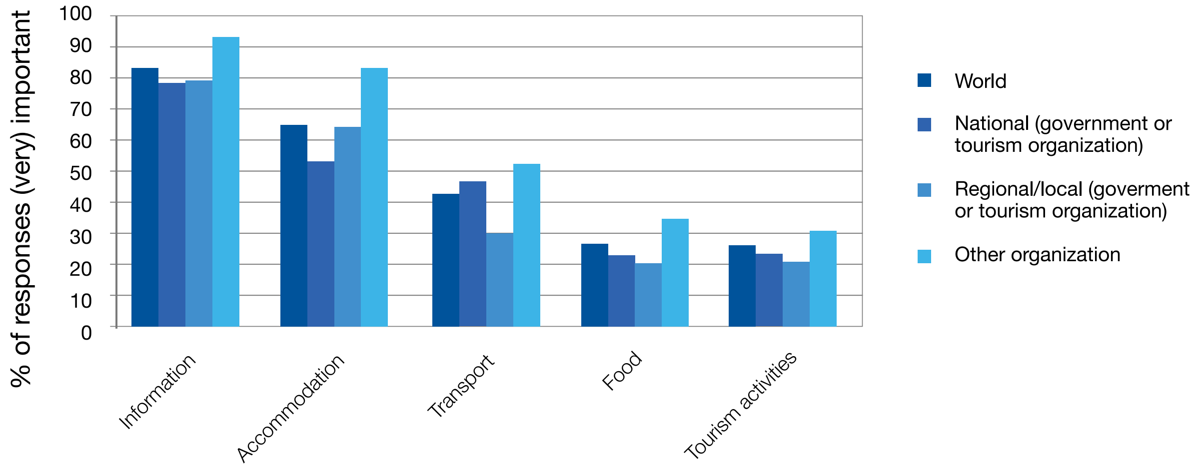


Figure 3.3: Current importance of new platform tourism services (% of responses indicating 'important' or 'very important')

Question B1: How do you rate the current importance of private tourism services through digital platforms for your activity/destination?



compared to national bodies (54%). For transport it was the opposite, with national bodies showing a higher percentage than regional bodies (47% versus 30%).

In addition to the five fields of private tourism services identified in the survey, the respondents added other sectors to the list which they considered relevant. These additions have been included into the existing categories: cultural and metropolitan services are included in 'tourism activities'; nautical services like mooring, swapping or private boat rental are in the field of 'transport'; and general information and mapping services are part of 'information'.

3.2 Impact of the new platform tourism services

The overall impact of new platform tourism services on destinations is predominantly rated as positive by respondents (see figure 3.4). In all fields of tourism services, the positive aspects seem to offset the negative aspects, according to the responses.

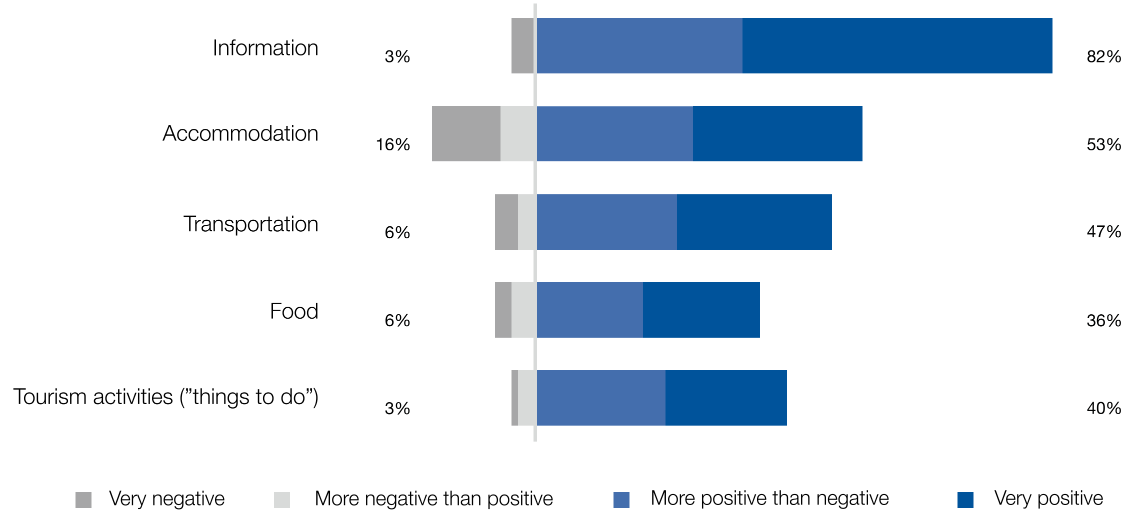
The most positive impact is in 'information' services, with 82% of respondents perceiving more positive than negative effects, while only 3% see more negative than positive effects. 'Transport' ranks second in terms of positive overall effect, with 47% of respondents considering predominantly positive effects, and only 6% seeing more negative than positive effects. In 'tourism activities', slightly more than 40% of respondents identify more positive than negative effects, while only 3% declared there were more negative than positive effects. However, about 40% of the respondents could not assign a score to this particular field.

'Accommodation' services are considered the most controversial according to the survey. The share of respondents who perceived a more negative than positive impact is the highest (16%). This reflects the intense debate about the impact of these new tourism services (the so-called sharing economy) on tourism, and specifically in the accommodation sector. The category of 'food' services which consist of dining experiences in private homes also shows a positive balance, though the percentage of respondents seeing more positive then negative impacts is the lowest (36%). However, as in 'tourism activities', about 40% of respondents could not provide an answer to this question, mostly because such services are not present in their destination, or relevant in their scope of work.

By region, respondents from Asia and the Pacific rated 'information', 'accommodation' and 'transport' services the most positively (see table A3.3). Respondents from Europe tend to be more critical of these tourism services through digital platforms, recognizing more negative effects. By organization

Figure 3.4: Current overall impact of new platform tourism services (%)

Question D1: How do you rate the current overall impact of private tourism services through digital platforms for your destination/activity?



Note: "neutral" or "unable to answer" responses are not included in the graph and make up the remainder to 100%.

types, representatives of regional or local bodies identify more negative effects compared to those of national administrations or other organizations (see annex 3, table A4.4). However, in all sub-groups the balance score is positive, meaning that respondents overall identified more positive than negative effects in the five fields.

3.3 Future perspectives

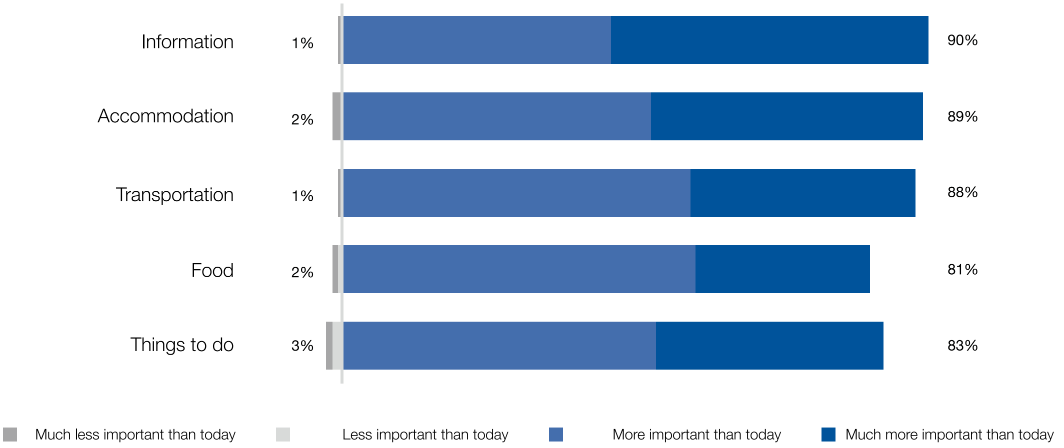
A large majority of respondents agree on the growing importance of the new platform tourism services in the coming five to ten years. Between 40% and 50% of respondents expect these tourism services to be "more important" and up to 50% "much more important" than today (see figure 3.3). The number of respondents expecting a declining role of these new services is 3% or less, while the remaining 9% to 17% expected no change in importance or could not answer.

In all five areas, over 80% of respondents answered that these services will be 'more important' or 'much more important' in the next five to ten years. For the 'information', 'accommodation' and 'transport' services, this percentage is 90%, 89% and 88% respectively. These areas are already very present and relevant today and are expected to become even more important in the future. Although 'food' and 'tourism activities' are considered comparatively less important today, 81% and 83% of respondents respectively expect to see their importance increase in the coming decade.

By UNWTO region and by type of organization there are just marginal differences in expectations (see Annex 3, tables A4.5 and A4.6). Respondents in the Americas and Asia and the Pacific are the most convinced about the future importance of these new tourism services, in particular in the areas of information, accommodation and transport. Representatives from regional and local governments or tourism organizations in general have the comparatively lowest expectations about the future importance of these services in all five areas of activity.

Figure 3.5: Future importance of new platform tourism services (%)

Question D2: From your perspective, how would you rate the future importance in the next 5–10 years of these private tourism services for your destination/activity?



Note: "no change" or "unable to answer" responses are not included in the graph and make up the remainder to 100%.

4.

Opportunities and challenges by area of tourism service

After presenting quantitative results of the UNWTO survey on new tourism services through digital platforms in Chapter 3, this chapter looks at the qualitative feedback of respondents on the opportunities and challenges identified in each of the five areas of activity, as well as recommendations for the future. The responses reveal a very diverse set of situations across countries. Understanding these different conditions can help destinations seize the opportunities and tackle the challenges arising from these services. The areas of 'food' and 'tourism activities' will be analyzed jointly, as these were considered by respondents to be less present and relevant in their destination or activity (see figure 3.1).

4.1 Information services

Information services such as TripAdvisor or Yelp provide user-generated reviews and other information on a wide range of tourism services such as accommodation, gastronomy and other activities, including guided tours and excursions, among others. Respondents acknowledge however, that multi-purpose social media like Facebook, Instagram or Twitter can also function as a source of user-generated information and opinions on tourism. While social media networks are not specifically designed for travellers, they constitute a popular source of inspiration and advice for travel, and a way of sharing travel experiences. Furthermore, general information and mapping services such as Wikipedia, OpenStreetMap and Wikitravel can also provide user-generated information for travellers. Others such as Wikiloc and Skiresort.info provide specific information on trails for hiking, skiing or biking.

Most responses indicate that TripAdvisor and Yelp are by far the most widespread platforms for information services. These platforms are particularly useful for travellers as they allow users to search for nearby attractions, accommodation or restaurants based on location, distance, rating and other parameters. They also offer the possibility to access and save information at any time before and during the trip.

Respondents to the survey also mentioned several other specific tourism information platforms such as Minube and Foursquare. Minube is intended to inspire visitors and provide information on places to visit. Other lesser-known platforms mentioned were Zoover or Wayn which provide guest reviews and travel experiences. There

are also meta-review platforms which can facilitate reputation management on a company and destination, such as ReviewPro and TrustYou.

4.1.1 Opportunities and challenges

Information platforms and user-generated content in the form of reviews and ratings provide a range of opportunities and challenges for tourism. In fact, more than 80% of the respondents identified distinct opportunities and challenges relevant to their destination or activity in this area.

Opportunities can be identified for visitors, for destinations and for service providers. Visitors benefit from these information services with easier and faster access to comprehensive, reliable and trustworthy information. More travel information not only leads to better informed choices and decision making before the trip, but also to better experiences during the trip itself. Furthermore, information resulting from customer feedback can indirectly help improve the quality of the tourism services.

For destinations, opportunities lie in the increased, quick and cost-efficient visibility of a destination. When properly used, these platforms furthermore represent an additional channel for marketing and promotion, as well as a valuable source of information about visitors and their expectations and experiences. This also stimulates quality improvement and what the Junta de Andalucía (Spain) called “data marketing optimization”.

For service providers, information platforms allow them to reach a wider, even global audience in less time and at a lower cost compared with traditional information channels. In this way information platforms can be a ‘business booster’ for tourism service suppliers. Information services can help individual businesses gain visibility where it might not have been possible otherwise. However, reaching more potential customers alone will not necessarily increase turnover.

There are additional opportunities for tourism businesses connected to information services. One is that customer feedback can help identify weak spots in the provider’s own service chain, and as a consequence turn weaknesses into strengths, if properly managed. In this way even negative reviews can help an operator or service provider to gain competitive advantages. Furthermore, positive feedback can help to motivate both entrepreneurs and staff. Lastly, information services can provide valuable market data, both on a provider's own business and on that of competitors.

There are a number of challenges related to these information platforms, though, according to the responses received. Most importantly, the quality of information is critical for all stakeholders – visitors, destinations, service providers and platforms. On one hand sometimes it might be needed to correct factual information (for instance opening hours, entry prices or amenities of an establishment). With regard to judgements and experiences, it concerns the publication of unreliable, biased or even false reviews or ratings, either misleadingly negative or positive. Dealing with such misinformation can be time-consuming and costly.

As highlighted in the responses of HOTREC, the European trade association of hotels, restaurants and cafes, and FEHGRA, the Hotel and Gastronomic Business Federation of Argentina, a code of conduct and good practice for service providers, online platforms and users is crucial. In this context, the World Committee on Tourism Ethics, an independent body working under the auspices of UNWTO, has recently prepared the document *Recommendations on the Responsible Use of Ratings and Reviews on Digital Platforms*.[8] These recommendations are addressed to the three main stakeholders involved – digital platforms, service providers and users – with the goal of encouraging the responsible use of ratings and reviews on digital platforms related to tourism.

Another important challenge lies in fully and successfully exploiting the opportunities. An issue raised by a few respondents to the survey was the fact that some businesses, especially small and medium enterprises (SMEs), are unfamiliar with these platforms and unsure of how to properly use them or how to deal with reviews and feedback. For hoteliers, destination managers, restaurant owners and other stakeholders, it is essential to grasp the online interactive technology in order to be able to address the issues raised by the user and to improve the products and services they market, so as to align their products and services with consumer expectations. The management of negative ratings, whether justified or not, does not only provide a challenge for businesses but also for destinations, because negative reviews for a business can radiate out to the entire destination and produce a halo of negative reputation. Destination management organizations (DMOs) are sometimes requested to provide guidance and support to SMEs. However, DMOs and tourism information points also need to be qualified to deal appropriately with these platforms.

Fostering collaboration between platforms based on user-generated content and traditional tourism information offices or providers is a further challenge. Both sources of information should be considered complementary and not competing with one another. Partnerships between NTOs and DMOs and online platforms are extremely valuable for the visibility of a destination and for the platforms themselves. The presence of tourism offices in such platforms contribute to the accuracy and integrity of the information offered. Factual information on heritage, museums, attractions, etc., which are typically promoted by destinations in their own websites, is thus also made available for potential visitors that rely on these platforms and forums.

"One of the main reasons why tourist boards exist today is to provide visitors with information on a particular destination. In the face of emerging global players, an important question for these organizations is how to deal, exchange, regulate and curate information? What is the future role of a DMO and how it creates value and remains relevant?"

Vienna Tourist Board, response to UNWTO survey

[8] World Committee on Tourism Ethics (2017), *Recommendations on the Responsible Use of Ratings and Reviews on Digital Platforms*, UNWTO, Madrid. See http://ethics.unwto.org/en/content/world-committee-tourism-ethics and www2.unwto.org/press-release/2017-05-01/unwto-international-congress-ethics-presents-recommendations-responsible-us.

With regard to more practical challenges, there were two further issues identified by respondents. Firstly, to be able to communicate to a worldwide audience and make use of these global platforms a reasonable command of languages is indispensable, in particular of English. Secondly, access to a stable and reasonably fast internet connection is also crucial, but not always available in some destinations in emerging market and developing countries.

Overall, when weighing the opportunities against the challenges, respondents clearly expressed the opinion that the positive aspects prevail. Thanks to the diverse and wide scope of information offered, online platforms have become a central source of information for consumers. For destinations, hoteliers, airlines, restaurants, attractions and other providers, platforms also have become an important communication channel, complementing traditional B2C (business-to-consumer) communication.

Today's visitors are making considerable use of user-generated ratings and reviews on online platforms when choosing places to visit, stay or eat. In the future, new tourism service providers, traditional businesses and authorities will have to increasingly work together in a proactive and responsible way in order to tap opportunities and tackle some of the aforementioned challenges.

4.1.2 Action taken and the way forward

When asked about action that has been taken in terms of addressing the various opportunities or challenges generated in the field of information services, respondents offered a number of examples of how these issues have been dealt with. Across destinations, stakeholders from both the public and private sectors stressed the importance of making better use of and better managing online user-generated content to potential visitors. In this context, it is important to highlight the crucial role of tourism organizations and relevant authorities such as destination management organizations in dealing with the different stakeholders involved – service providers, digital platforms and users. This is especially important when solving conflicts between stakeholders, if these should arise. For instance, one respondent mentioned that in the case of negative ratings, the DMO had explained that they sometimes reach out to businesses, and prompt them to react to this feedback and work on their weaknesses.

Presently, millions of reviews and ratings related to the travel and tourism sector are available online via the numerous platforms. Given their high visibility and importance, more and more destinations are dedicating resources to this issue. In the survey, the Tourism Board of Macao, for instance, indicated that they have used digital platforms to conduct a global media campaign with a view to targeting key source markets. The Malta Tourism Authority also mentioned the organization of joint marketing initiatives on digital platforms.

In addition to research studies, workshops and other educational activities, sponsorship agreements and other collaborative opportunities between major platforms and public tourism organizations were also mentioned by some respondents. An example of this type of collaboration is the case of the Tourist Board of the Croatian town Mali Lošinj and TripAdvisor. For one year, a sponsorship agreement between them allowed the Tourist Board to provide and manage the content about their town, such as pictures and videos, on the TripAdvisor platform. This can help tourism organizations not only to guarantee the trustworthiness of information provided to visitors, but also allow them to be in a better position to help businesses to deal with the reviews and ratings, as was mentioned by one respondent.

Another example of collaboration that deserves mentioning is that of the Seychelles Tourism Board and TripAdvisor to provide adequate information and training on digital marketing platforms to its tourism operators, as well as to encourage them to increase their presence in such platforms:

"In the past two years, the Seychelles Tourism Board has organized several digital marketing workshops in relation to TripAdvisor with the aim of raising awareness and educating tourism operators on the importance of TripAdvisor. In addition, in 2015, the Tourism Board, in collaboration with TripAdvisor, organized a TripAdvisor awards ceremony in the archipelago, which saw over 100 hotels, guesthouses, self-catering apartments, boat and dive operators being awarded with TripAdvisor Certificates of Excellence for 2014, based on reviews by their customers."

Seychelles Tourism Board, response to UNWTO survey

Efforts to include online information services in public strategies, and continuing research to better understand the behaviour of visitors, is also taking place in smaller destinations and those seeking to become more digital, according to responses to the survey. The Ministry of Tourism of Kenya pointed out that officials are currently encouraging tourism operators to go digital.

This collaboration also extends to the private sector. A UNWTO Affiliate Member from the traditional accommodation sector in Brazil explained that they have collaborated with TripAdvisor in order to learn how to properly use the platform, and to know the rules that apply. Initiatives like this sometimes are triggered by the concern that some user-generated content might be false. This was also mentioned by Visit Espoo, in Finland, or the Macao Tourism Office. Another example of successful private-public collaboration is the initiative of the Junta de Andalucía, Spain, called Andalucía Lab, which aims at boosting the digital and technological competitiveness of the thousands of small companies that comprise the tourism and retailing sectors in the region of Andalucía, to help build a more competitive destination.

Table 4.1: Accommodation services (house, apartment, room, bed, etc.) and type of transaction

For rent	For exchange	For free
Airbnb Homeaway Wimdu 9flats.com alterkeys.com onefinestay	Couchsurfing HomeExchange.com GuestToGuest CasaVersa Love Home Swap	Couchsurfing

4.2 Accommodation services

Survey responses show that there is a significant number of accommodation rental platforms across the world, whether operating on a global, regional or national scale. The majority of respondents (85%) mentioned several accommodation platforms which are active in their destination (listed in table 4.1). When analyzing these platforms, it is important to highlight the broad range of the tourism offer provided, depending on the platform used. In a single platform the accommodation offered can take the form of providing a single room or even a sofa, or the entire property, whether the owner's primary residence (while they are away), or a secondary residence (a holiday home or even a boat). By contrast, other platforms only focus on offering an exclusive type of accommodation. Not all platforms are limited to the temporal provision of primary or secondary properties by private individuals, but offer also properties by commercial operators renting out on a permanent base.

Although the most popular platform for accommodation is Airbnb, several other websites were cited by respondents. There are differences between these platforms, both in terms of popularity (which often depends on the destination) and the type of experience they provide. Another important distinction exists between the *true sharing* platforms where exchange takes place without commercial motives, and even, in some cases, with no economic transaction, and the platforms with commercial providers where a money transaction takes place, in addition to the less clear-cut cases, where a mix of both occurs.

For instance, Couchsurfing works on the premise that a user has potential friends around the world, and therefore these friends can also act as hosts who are willing to let a stranger sleep over in their place for free. Another lesser-known home exchange platform is GuestToGuest, which seeks to be an alternative to both Airbnb and Couchsurfing. Without any payment involved, the users of GuestToGuest can stay at another user's property by using a 'Guestpoints' system. Another example is Homestay, which is something in between, allowing visitors to learn a bit more about the local culture by staying at a local's home. According to the platform rules, the hosts must be at home during a visitor's stay and agree to spend time with them. Indeed, the categorization of peer-to-peer rental accommodation platforms is not simple, and can include a wide range of formats.

In addition, there is a growing service industry which provides administration services, guest handling, payment, cleaning and others to property owners. Other service providers such as Pillow, Beyond, and Guesty were mentioned by respondents, but these are designed for hosts, not guests, and therefore will not be discussed in this report.

4.2.1 Opportunities and challenges

Accommodation services offered through digital platforms give rise to a variety of opportunities and challenges. From a destination perspective, one of the major opportunities is the potential to attract and host more tourists, either by increasing the room capacity of a destination, or by offering a new and different type of experience to visitors. Bringing tourists closer to the local communities, an increase in affordable accommodation, innovative ideas and the enlarged visibility through global platforms are marketing opportunities for destinations.

According to the Secretariat of Tourism of the State of Guanajuato, Mexico (SECTUR GTO), lower prices provided by the new accommodation offer and the creation of unique experiences with personalized features, can result in more visitors to the region. Similarly, the Municipality of Tel Aviv-Yafo, Israel, stated that by providing more affordable options, the online platforms have helped to reach new demographic segments of tourists, particularly attracting the younger generation, which was previously more difficult given the high prices of accommodation in the city. Indeed, throughout the survey, the affordability factor was mentioned by a considerable number of respondents who were quite distinct both geographically and in terms of organization, ranging from national to local tourism authorities.

Moreover, the additional competition brought about by these online platforms has lead to a larger variety and number of accommodation options on offer, and thus often contributed to make destinations more competitive. Airbnb itself claims that it is positioned to help capture the variety of experiences a destination has to offer, and thus help a destination to stand out from the crowd. Some respondents mentioned this phenomenon:

"The service providers in the field of accommodation help raise competitiveness, which can lead not only to improving the quality of the offer, but also to expanding it and presenting a more distinctive offer. Also, the platform itself can be seen as a source of ideas that can be successfully implemented by other competitors."

Ministry of Trade and Tourism of Bosnia and Herzegovina,
response to UNWTO survey

For hosts, the benefits lie not only in the possibility of increasing their revenues from more guests, but also in meeting people from other parts of the world, which can be an enriching experience. Likewise, local communities can benefit from new sources of income and also from the revitalization of local businesses and economies. It can also bring tourists closer to local communities, as mentioned by the Ministry of Tourism of Brazil, favouring the development of tourism in certain areas. Respondents from the Republic of Korea also highlighted the creation of jobs and the revitalization of local economies as opportunities. Social and economic development at the local level, including the rediscovery and revival of neighbourhoods outside the city centre, also provide opportunities for some destinations. This can be especially important for local communities in emerging countries.

Despite the opportunities mentioned in the survey, a significant number of challenges were also reported. The most common was that the increase in tourist accommodation rentals is sometimes viewed as unfair competition for the traditional providers such as hotels. Although the new suppliers do not necessarily compete with the traditional accommodation providers, they might create "indirect competition", as the Honduras Institute of Tourism calls it. In their view, "it can provide a more appealing alternative for today's visitor, who is seeking a more local and authentic experience".

Several respondents mentioned unequal conditions and unfair competition between the new service providers and traditional operators. The Ministry of Tourism of the Ivory Coast highlighted unfair competition and tax evasion, particularly due to the fact that digital transactions are more difficult to track. In line with this, the Ministry of Foreign Trade and Tourism in Peru (MINCETUR) mentioned that measuring and regulating these providers represents a significant challenge for their organization. In many cases, respondents called it a "shadow economy", an "informal economy" or a "black economy", not only in terms of taxes, but also regarding the working conditions of employees.

It is also important to explain that 'unfair' competition does not necessarily mean that regulations should be the same for commercial and new accommodation suppliers. According to the survey respondents, there is still much debate as to whether private tourism services have to follow exactly the same rules as commercial services.

Although challenges seem most prominent in city tourism and less visible in rural destinations, the negative consequences can affect all stakeholder groups to different degrees. Unfair competition can affect the existing hotel industry and other commercial lodging outlets (see HOTREC citation below).

The Tourist Agency in Valencia, Spain, argues that the current conditions provided by private suppliers and the lack of control over such activities, prevent the assurance of quality that, in turn, endangers the image and reputation of the destination. By providing non-traditional accommodation such as a private residence or a holiday home, the digital platforms claim that they are able to create stronger links between local people and visitors, helping destinations to attract and accommodate travellers. However, when visitors stay in these properties, authorities cannot verify their quality or safety and security, and that can also be perceived as a negative side-effect.

In short, ensuring a level playing field in the accommodation sector for all the players in the marketplace is a key challenge that was identified by many organizations participating in the survey. Distinguishing the occasional accommodation rentals offered by private individuals from what the city of Vienna characterises as the "sharing economy with commercial orientation" is extremely difficult, and provides an obstacle to applying adequate regulation. This difficulty was acknowledged by the Vienna City Administration, which identified as a "crucial challenge the need to find out how to integrate the so-called sharing economy activities in the tourism value chain, or vice-versa".

"HOTREC has developed some key pillars for a fair and responsible 'collaborative' economy, which should be converted into practice by the authorities. This includes the call for better enforcement of compliance with tax obligations, registration of the activity, liability of platforms to actively cooperate in the enforcement of existing rules, but also of voluntary commitments."

HOTREC, the European trade association of hotels, restaurants and cafes, response to UNWTO survey

Related to this is the issue of data compilation. Authorities from different countries and cities with existing regulations indicated that access to data was a problem, meaning that sometimes they are unable to distinguish between private hosts and commercial providers. They also mentioned that they cannot always enforce existing rules regarding registration or tax collection for instance. In order to address this, some organizations such as the Hungarian Tourism Agency have started to collaborate with platform companies in order to be able to access the data they need.

From the local community's perspective, one of the most frequent challenges mentioned is the uncontrolled planning and development of holiday rentals in residential areas. The main concern here is that these short rentals, especially in cities, might grow in an uncontrolled manner, and thus increase the pressure on the housing market, meaning a decline in availability of properties for long-term rentals. This is problematic, especially for cities where housing space is scarce, and is true for many of the bigger cities today. The Vienna City Administration shared this concern by noting that their city is growing, and so the housing market is under pressure. Although more than 60% of residents in Vienna live in publicly-financed dwellings, there is concern that letting whole apartments will exert increasing pressure on the housing market, diminishing supply available for residents and pushing up rental prices.

To date, there have only been a few studies focusing on the impact of the supply of tourist accommodation through digital platforms in different destinations, and these have been mainly in urban areas. One of these is the research conducted by EXCELTUR, Alliance for Excellency in Tourism (Spain), about the impact and challenges rising from the phenomenon of tourism rental homes in Spain. The study aims to provide an assessment of the current implications and legislation in Spanish territory, and analyze the present challenges associated with this phenomenon in depth.

Source: EXCELTUR, Alliance for Excellency in Tourism; Exceltur (2015b), Estudio sobre el impacto en España del negocio de alquiler de viviendas para uso turístico a través de plataformas P2P on-line, Comunicado de Prensa, Madrid, 25 June 2015 (online), available at www.exceltur.org/monograficos8.

Lastly, because these service providers tend to be less concentrated and have extended into residential areas, questions of nuisance and disturbance – and also the changing of neighbourhoods through "touristification" – are discussed. For instance, although new providers can contribute to the supply of accommodation in areas with limited hotel supply, or when the city is hosting large events, the Federation of Tourism Companies of Chile (FEDETUR) emphasizes that the new supply might create problems in residential neighbourhoods. Locals might feel less at home because of the rising number of tourists in their neighbourhood, causing an emotional challenge, rather than an economic one.

4.2.2 Action taken and the way forward

As mentioned above, some destinations, especially cities, have implemented new regulations or revived older regulations, mainly to differentiate between services of the sharing economy without commercial orientation, and those with a commercial orientation, in order to apply these regulations to the latter group. Despite the strong focus on Western European or North American destinations in the public debate, there have been some recent developments in other parts of the world where accommodation supply through digital platforms has also been growing.[9] In Latin America, for instance, Costa Rica is the first country that has attempted to regulate the activities of the so-called sharing economy in the field of accommodation by initiating collaboration between representatives of the tourism sector and digital platforms:

"The Costa Rica National Chamber of Tourism (CANATUR), composed of members representing the national tourism industry, chambers and associations of Costa Rica's private tourist sector, is working on the drafting of a bill to collect sales taxes from Airbnb hosts in the country. According to CANATUR, Airbnb is very interested in collaborating, and is outlining a legal framework to regulate this type of sharing economy enterprise. Airbnb has declared its willingness to adjust its platform to facilitate tax collection from the hosts of short-term rentals of less than thirty days. CANATUR

[9] Nielsen (2014), Is sharing the new buying? Reputation and trust are emerging as new currencies, The Nielsen Company (online), available at: www.nielsen.com/content/dam/nielsenglobal/apac/docs/reports/2014/Nielsen-Global-Share-Community-Report.pdf.

stated that this agreement is proof that sharing economy platforms should become tax collectors. Airbnb hosts without the tourism business recognition issued by the Costa Rican Tourism Board will be taxed."

Costa Rica Tourism Board, response to UNWTO survey

Several points should be underlined regarding the way forward. Firstly, appropriate regulations to deal with existing grey areas in private and commercial accommodation need to be adopted and enforced, even if that means adjusting the existing legal framework to the new situation. In certain cities, platforms are already collecting – or will start to collect – taxes directly for each reservation. In other cases, governments have approved legislation allowing property owners to rent out their private homes as short-term tourist rentals without the need to register as a hotel business.

As a consequence of the increasing number of short-term home rentals, in many destinations thresholds have been put in place to help differentiate between occasional accommodation providers and commercial providers. One way is to put a limit on the number of days a property is rented: 60 days a year in the case of Amsterdam[10] , 90 days in London[11], or 120 days in Paris[12]. Providers who rent an apartment for no longer than 60, 90 or 120 days a year in these cities are treated as non-commercial providers. Other ways include setting a maximum number of beds, or a maximum number of guests in the apartment at a given time. Other cities have adopted a more restrictive approach, and have prohibited short-term rentals altogether, unless properly licensed. In most cases, however, the regulations have been in place for a long time, but have only come to public awareness more recently because of the increasing volume of short-term rentals.

In Germany, six of the eight biggest cities have 'misuse regulations' for residential space, and one is reviving an old regulation from 2004.[13]

Through several reports and studies, hoteliers and hotel associations have argued that they have been seriously affected by these new accommodation suppliers, resulting in a loss of revenue. They have been actively calling on authorities, at the national or regional level, to create a fair environment in the field of tourist accommodation services.

Although licensing is the most obvious approach to regulation (and is a common theme among the responses), some respondents such as the Vienna City Administration have been looking at other solutions. Although the sharing economy is a relatively recent phenomenon in Vienna, an internal working group was established last year to study it. The group considered ideas like an intensive information campaign, or ways in which the existing regulations can be amended to turn the sharing economy into a fairer economy in Vienna.[14]

Investing in information campaigns aimed at current and would-be hosts in order to communicate the rules and regulations, is a necessary first step to raise public awareness, as well as tackling the lack of knowledge on guidelines and legal provisions in this matter. To this effect, Malta Tourism Authority's campaigns have included educational and promotional campaigns aimed at making owners aware of their responsibilities before the law, of the fines applicable if they break it, and the options available for regularization. The tourism authorities in Vienna have also changed the tourism law and created clear standards and regulations on how citizens can use or provide these accommodation services.

[10] For more information, see Amsterdam short stay policy (2017), 'I am Amsterdam', available at: www.iamsterdam.com/en/living/everyday-essentials/housing/rental-property/shortstay.
[11] For more information, see Department for Communities and Local Government (2015), Promoting the sharing economy in London. Policy on short-term use of residential property in London (online), London, available at: www.gov.uk/government/publications/short-term-use-of-residential-property-in-london.
[12] Baldy, R. (2017), 'Décret Airbnb: les loueurs vont devoir s'enregistrer', Le Parisien, 05-05-201 (online), available at: www.leparisien.fr/economie/decret-airbnb-les-loueurs-vont-devoir-s-enregistrer-05-05-2017-6918285.php.
[13] Data provided by the NIT Institute for Tourism and Recreational Research in Northern Europe, Kiel, Germany.
[14] City of Vienna (2016b), Turning the Sharing Economy into a fair economy in Vienna (online), available at: www.wien.gv.at/wirtschaft/standort/publikationen.html#wir.

Equally important to the sharing of information is access to data and measurement. Measurement only becomes possible if the authorities are able to cooperate with platforms, and are granted access to their data. The need for some kind of inventory or database of regulated and unregulated accommodation was often mentioned in the responses to the survey. In fact, collaboration between the online platforms, which are intermediaries for these providers, and the authorities, is a step in this direction. While some tourism organizations reported past or current conversations with digital platforms, particularly regarding data, others declared that they had not managed to reach an agreement with the platforms.

"In August 2017, the Balearic Islands Regional Tourism Government has approved a new regulation for holiday rentals. Digital platforms advertising or commercialising holiday homes in the Balearic Islands are obliged to display the holiday home official tourist registration number. The non-compliance with the above obligation is penalized by a fine that for marketing platforms ranges between EUR 40,001 and EUR 400,000, and for owners or traders, between EUR 20,001 and EUR 40,000."

Balearic Islands Regional Tourism Government,
updated response to UNWTO survey

In matters relating to cooperation with platforms, the goal always seems to be the same: finding a way to guarantee both the quality of services and compliance with regulations. Drawing on recent developments, it is noteworthy that some platforms have already acknowledged their responsibility and will to share their information with the authorities.[15] Over the past years Airbnb has launched some partnerships with destination managers in a range of cities including, but not limited to: San Francisco (California, United States of America), Tel Aviv (Israel), Brooklyn (New York, United States of America), Copenhagen (Denmark), London (United Kingdom), Cuiabá (Brazil) and Amsterdam (the Netherlands).[16]

"As Airbnb grows, it has recognized the opportunity and responsibility it has to work with local governments to craft progressive, fair rules for home sharing. In November 2015, it launched the Airbnb Community Compact, outlining a set of policy principles and commitments 'guiding how we engage with communities around the world. The commitments include paying our fair share of hotel taxes, working with communities to put in place rules that support each community's specific policy needs, and sharing data by regularly providing information about our host and guest community to cities and other jurisdictions in which we operate, in a manner that is consistent with our privacy obligations'."

Airbnb, response to UNWTO survey

A second approach towards understanding this phenomenon – and the challenges it poses – is that of a comparative analysis between destinations. This includes the question of when a lot is too much. This question cannot be answered by one city alone, but rather needs a set of standards to be discussed by destinations. Exchanging, comparing and analyzing the information provided by online platforms is important, but so is sharing experiences between destinations facing a similar situation. In this regard, a proposal has been made by the Tourist Agency of Valencia, Spain, to develop a comparative analysis between urban European destinations on how they manage the challenges of the so-called sharing economy.

In some cases, destinations are including these new tourism services in their general quality control programs. Many destinations and DMOs have invested massively into the quality of services, especially (but not only) in the field of accommodation. This guarantee of quality for the customer needs to be extended to private tourism services, as highlighted by Visit Flanders, Belgium:

[15] Airbnb (2016a), Airbnb Policy Tool Chest (online), available at: www.airbnbcitizen.com/introducing-the-airbnb-policy-tool-chest.
[16] Airbnb (2016b), Bringing More Travellers to More Places: Airbnb's Partnerships with Cities and Destination Managers (online), available at: www.airbnbcitizen.com/bringing-more-travelers-to-more-places-airbnbs-partnerships-with-cities-and-destination-managers.

In Flanders, since April 2017, the new Accommodation Act has been in force, and has resulted in several significant changes in overnight accommodation in the region. The Act simplifies the administrative rules for tourism accommodation with clear rules on safety and quality. Along with the traditional accommodation, new types of accommodation such as private guest rooms or other online rentals are included and obliged to follow the same standards related to (fire) safety, insurance and hygiene. This requires the compliance of several basic quality standards.

Visit Flanders[17]

Looking forward, most respondents mentioned the need to monitor the situation, including the impact of this increasing supply of accommodation on all stakeholders. The Ministry of Tourism of Brazil has shown interest in analyzing the impact of the supply of these tourism rentals on the housing market.

In April 2016, the UNWTO Affiliate Members in collaboration with the Ministry of Tourism of Uruguay, the Hotel and Restaurant Association of Uruguay (AHRU) and the Hotel and Gastronomic Business Federation of Argentina (FEGHRA) organized the First Ibero-American Meeting on the Sharing Economy which gathered government bodies, national tourism organizations, tourism associations, academic institutions and other private sector actors to discuss the situation in this regard. Held at Montevideo, Uruguay, the event analyzed the impact of the so-called sharing economy on the tourist accommodation sector in Ibero-America, to discuss possible solutions, minimize its negative consequences and to promote public-private partnerships.[18]

4.3 Transport services

Currently, four types of services can be distinguished in the field of land transport, depending on whether the service is a ride by a driver or the sharing of a vehicle,

[17] For more information: Visit Flanders available at: www.fdfa.be/en/tourism-licences.
[18] For more information: 1ª Reunión Iberoamericana sobre economía colaborativa en el alojamiento turístico, 4 – 5 April 2016, Montevideo, Uruguay, available at: http://affiliatemembers.unwto.org/es/event/1-reunion-iberoamericana-de-la-omt-sobre-economia-colaborativa-en-el-alojamiento-turistico-0

and on the distance travelled. See major operators for each type of service in the table below (indicative of the diversity of relevant platforms operating worldwide, not exhaustive). There are also services for air and water transport, but these are rather specialised niche services and are not dealt with in this section.

Table 4.2: Types of transport services

Type of transport service	Examples of digital platforms
Short distance ride-hailing	Uber, Lyft, Cabify, Liftago, Grab, Didi Chuxing, Ola, Careem, Taxify and Yandex.Taxi
Long distance ride-sharing	BlaBlaCar, Sidecar, Toogethr, OpenRide and Rdvouz
Private car-sharing	Getaround and Ridelink
Institutional car-sharing	Zipcar, Car2go and Drive-now

Although these services are used in the first place by locals, they serve visitors' needs as well. The most commonly discussed type of transport service is that of short-distance *ride-hailing*. Ride-hailing is comparable to the service provided by a regular taxi, but generally it is provided by private individuals using their own vehicles to drive passengers for a fee. Drivers are often not licensed and work on a freelance basis. Ride-hailing platforms have become popular all around the world, and many prefer using this service over a traditional taxi. Uber is the best-known example of a ride-hailing company globally and currently operates in more than 600 cities worldwide and more than 70 countries.[19]

Long distance ride-sharing consists of connecting drivers who have empty seats and are travelling to a certain destination, with individuals looking to travel on the same route. Online platforms such as BlaBlaCar are used to connect drivers with riders and to share the costs of a trip. Drivers are not professionals looking to make a profit, but mostly seek to lower their own costs

19 More information available at: https://newsroom.uber.com/locations (information retrieved in 15 August 2017).

or to have company while travelling. While long distance ride-sharing is generally considered as *true sharing*, i.e. recovering marginal costs by making use of unused assets, short-distance ride-hailing is typically not.

Another type of transport service through digital platforms is car sharing, a sort of short-term car rental. The main difference between private and institutional car-sharing is the ownership of the car, a private individual in the first case and a company in the latter. In both cases, anybody with a driving license can rent a car for short periods of time. An example of institutional car-sharing currently operating in several cities is car2go. Cars are parked in various locations across the city, and registered users of the service do not have to meet anyone or complete paperwork to be able to rent a car.

As with the accommodation sector, there is a growing market of related services for these new transport service suppliers, such as insurance for providers of ride-share services like Rideshare Insurance, or other intermediary services like HyreCar, aimed at renting vehicles to people who want to drive for Uber or Lyft. Although respondents mentioned some of these services, these are not further discussed here.

4.3.1 Opportunities and challenges

Respondents identified a range of opportunities in the supply of transport services offered through digital platforms. Short distance ride-hailing services were identified by organizations as an opportunity to enhance competitiveness and improve the overall quality of existing transport services. Increasing transportation options, convenience, affordable prices and better accessibility are some of the benefits highlighted in their responses. It is also often argued that ride-hailing services such as Uber or Lyft can even provide superior quality and better customer experience compared with that offered by traditional taxis. Quality refers to the type and cleanliness of the car and the friendliness of the driver among others, but also to the clarity and transparency experienced in the booking and payment process and the perceived safety, as driver and car are both known and rated.

Some respondents stated that the competition created by these new providers might trigger a desirable pressure on taxi companies to improve their services, and to introduce more convenient digital information and booking services. In the words of one respondent, "often taxi drivers do not offer great quality and one might argue that they have 'missed the boat'". Besides the lower prices, the innovation and convenience of digital platforms seem to increase the client base. For international travellers there is also the advantage that this service is similar from country to country, with the convenience that the visitor can use the same app everywhere they go.

Whether or not it is *true sharing*, some respondents argued that the rise of new transport providers cannot only help reduce traffic congestion, but also improve local air quality, and free up parking spaces. With affordable rides readily available there is less need to own a car. Some respondents also mentioned the sustainability factor as another opportunity. This is mostly accurate for the long distance ride-sharing services such as BlaBlaCar. People travelling with extra seats can offer them and find passengers interested in sharing the travel costs. For remote areas, or areas without a transportation network, these transport services can be of great value. Improving the connectivity of some less well-visited destinations can make a destination visible and help further develop tourism in the region. Similarly, as highlighted by the Ministry of Industry and Trade of the Czech Republic, the mobility provided in urban areas through these services can help the push towards replacing car ownership.

In some countries the supply of transport services through digital platforms is still a relatively nascent market, but one with great potential. It has been said that, with properly formulated regulatory frameworks, these services can help bring value to local communities and tourists alike. In others, platforms offering ride-sharing, ride-hailing or car-sharing services, have been growing and thriving, particularly in big cities:

"In the Czech Republic, Liftago is one of the most widely-used transport platforms. In contrast to most of its competitors, Liftago is building the marketplace on top of existing taxi infrastructure. The platform only allows drivers who comply with the regulatory framework in place to operate through their platform. The ride-hailing platform allows passengers to choose their driver (taxi), enabling the best drivers to thrive, and therefore delivering a superior passenger satisfaction. Liftago is proposing alterations to the current regulations at municipal, ministerial and governmental levels in order to update parts of the existing framework, and to decrease the costs and increase accessibility for all industry drivers (and thus for riders)."

Liftago, response to UNWTO survey

It is the relationship between short distance ride-hailing and the traditional taxi system that is generating the main challenges in this area, according to most respondents. While commercial suppliers have to comply with a series of regulations, new suppliers, in most cases, do not. Regulatory issues include licensing, car and passenger safety, and working-time regulations for drivers. As with other sectors of the so-called sharing economy, respondents often refer to these new providers of transport as unregulated and, therefore, illegal.

Consumers can only benefit from a greater range of options if appropriate protection is in place. The fact that safety standards for drivers and passengers (such as provider background checks, insurance, etc.) are not always guaranteed when using ride-hailing services, poses a significant challenge. Failing to meet these requirements can represent a risk to all the parties involved – drivers, platforms and consumers alike.
To sum this up, the challenges of maintaining a level playing field for transport services are, to a large extent, similar to those raised in with regard to accommodation. Nonetheless, in the specific case of transport services, public organizations seem to be more inclined to regard the supply of transport services through digital platforms as a regular business activity that needs to operate under the same regulatory framework, as any other.

4.3.2 Action taken and the way forward

In recent years, ride-hailing platforms have been subject to intense scrutiny and to regulatory pressure from the authorities in many destinations. This has been much less the case with other types of services such as ride-sharing or car-sharing. There seems to be a general agreement amongst respondents about the need to maintain a level playing field between these new providers and traditional commercial transport providers.

In practice, approaches and regulations differ across countries and even within countries. In a number of places short-distance ride-hailing operate without limitations, while in others these services have to comply with specific regulations, such as displaying a windshield symbol in their car, or the requirement for drivers to be registered or obtain a license for a passenger transport business. In some destinations platforms such as Uber have been banned from operating, and in others there is still pressure to do so. In Italy, for instance, Uber ride-hailing services have been recently banned after a court ruled that it represents unfair competition for traditional taxis.

Long distance ride-sharing also has sometimes been disputed, as the following case from Spain shows.

In 2010, the Spanish Confederation for Bus Transport (Confebús) filed a lawsuit against the company BlaBlaCar for unfair competition. It argued that BlaBlaCar was, in effect, providing the services of a transport company, and that this ride-sharing was unfair competition. In the beginning of 2017, a Spanish First Instance Commercial Court dismissed the case, stating that BlaBlaCar is a platform that focuses exclusively on private transport, and is therefore not subject to the transportation regulations.

Source: Marraco, M. (2017), 'El juez rechaza que Blablacar sea "competencia desleal" contra los transportistas', El Mundo, 03-02-2017 (online), available at: www.elmundo.es/economia/2017/02/03/5894789346163f44288b4629.html

The legal definitions, and the establishment and enforcement of legal frameworks are considered to be major challenges that need to be addressed. Taxi associations are calling for equal conditions and expect governments to enforce these regulations at all levels. However, a complete ban on ride-sharing services is not likely to be sustainable in the long-run, as these services diversify and complement the available offer and meet a strong public interest in places where they are allowed to operate. In fact, in some places services have been admitted under specific conditions after having been banned initially, as happened in Madrid, Spain.

It is expected that traditional operators can co-exist with the new ride-hailing services, but might have to adapt to new standards in order to be competitive. Some respondents reported about the launching of initiatives to encourage the established taxi businesses to go digital, and thus to improve their services.

4.4 Food, tourism activities and other tourism-related domains

This section will focus on experiences such as meal-sharing and other tourism activities, i.e. 'things-to-do', offered by private individuals to visitors through global digital platforms. Of these, the most important are:

Table 4.3: Fields of 'food 'and other 'tourism activities'

Field of activity	Description	Examples of digital platforms
Food	Communal dining or meal sharing in a private environment	EatWith, Feastly, VizEat, BonAppetour and PlateCulture
'Things to do' or tourism activities	Guided tours, excursions, attractions and other activities	BeMyGuest, ToursByLocals, Vayable, Trip4real[20], Klook and Triip

Meal sharing has also reached the tourism sector in recent years and consists of enjoying homemade food in a stranger's house when travelling. Through meal-sharing platforms, visitors are offered a variety of dining experiences in a private setting. Guests are either provided with a meal or can use their own culinary skills to help prepare it. In both cases, the experience offers a closer look at the culture and cuisine of the destination. Similarly, visitors can use global platforms such as ToursByLocals or Triip to connect with engaged locals who rely on their knowledge to design a wide range of tours, outings and other activities.

Compared with other tourism services discussed such as accommodation or transport, these 'things to do' or tourism activities appear less developed at the moment, hence they have not generated as much discussion in terms of opportunities, challenges and action taken. Moreover, overall it has attracted far less attention, because to date the competition generated by these suppliers has mainly been for small and medium enterprises (SMEs).

4.4.1 Opportunities and challenges

The respondents saw many more opportunities than challenges in the 'food' and 'things to do' areas. The most frequently emphasized argument is about enhancing the destination experience through these services, which can lead to a strengthened reputation and positioning of the destination. Around the world, food or other tourism activities are becoming a popular choice for visitors, but also for locals. By bringing visitors closer to locals, these services not only provide an opportunity to generate income, but also to foster tourism development altogether:

"Food brings tourists closer to local communities, promoting the cuisine and regional crafts, tourism development in certain localities, in addition to generating income."

Ministry of Tourism of Brazil, response to UNWTO survey

Most respondents agree that homemade food can show tourists the culinary richness and heritage of the destination they visit:

[20] Trip4real has been recently acquired by Airbnb. For more information: 'Airbnb moves further into local activities with Trip4real acquisition', in Business Insider, 20-09-2016 (online), available at: www.businessinsider.com/airbnb-movies-further-into-local-activities-with-trip4real-acquisition-2016-9.

"It is a great opportunity to showcase the secret gems of Greek gastronomy."

Association of Greek Tourism Enterprises (SETE),
response to UNWTO survey

There are, however, a few challenges connected to these new services. In the area of food, some respondents raised the issue of health and hygiene, and thus of consumer protection. While restaurants are usually strictly regulated and monitored when it comes to hygiene and cleanliness, food services provided by private individuals are not.

In the area of 'things to do' or tourism activities, some respondents see these services challenging the traditional role of the public tourism information services such as DMOs, tourist offices, or visitor information centers. In a broader context, this is not only true for assistance with activities, guided tours and attractions, but also for general official information about the destination as well.

4.4.2 Action taken and the way forward

Weighing opportunities and challenges, respondents suggested focusing on promoting such private services rather than on regulating them. This includes encouraging further collaboration of both the private individual providers and the professional ones like restaurants and official tour guides, as well as the tourism boards, with each other and with the platforms.

5.

Governance

As evidenced from the survey responses, new platform tourism services can raise a number of governance issues. In the research conducted, four main areas of governance were identified:

- Tourism planning and sustainability
- Fair competition, i.e. keeping a level playing field
- Consumer protection and
- Labour conditions for service providers and workforce.

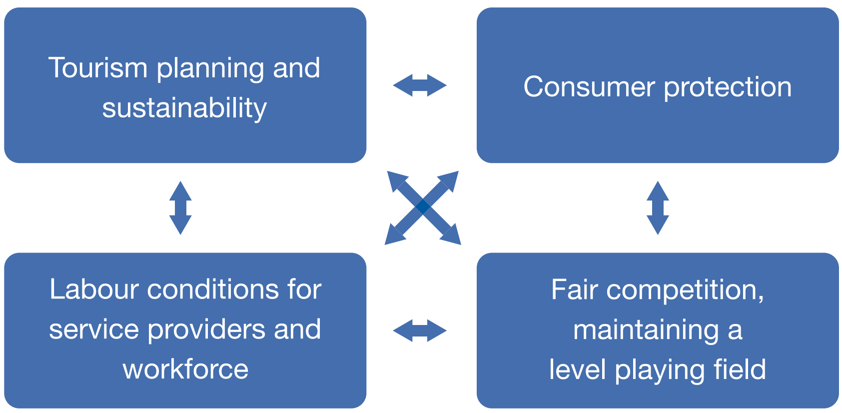
Each area and its implications for stakeholders involved is summarised below.

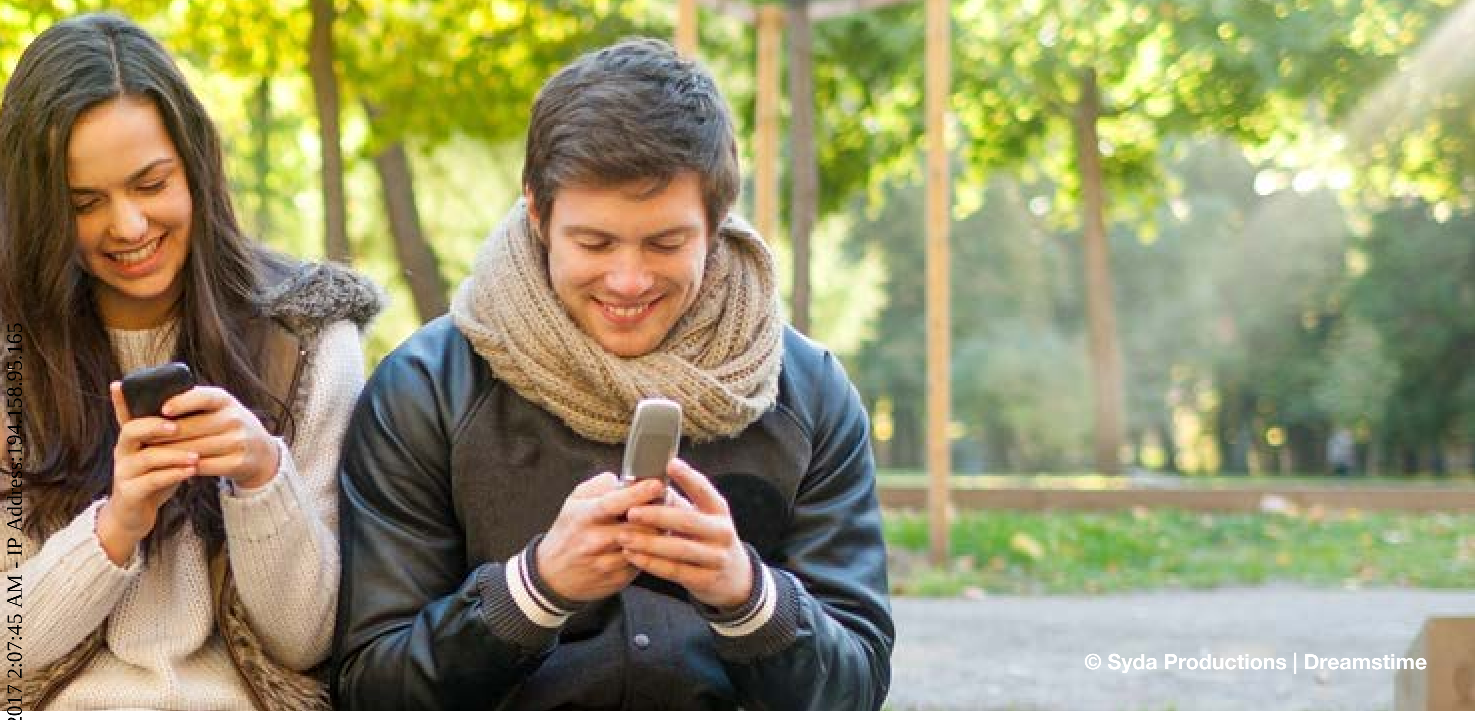
5.1 Governance issues

Overall, the vast majority of respondents perceived governance as being ‘important’ or ‘very important’ when dealing with new platform tourism services (see figure 5.2).

According to the survey, consumer protection and fair competition are considered the two most important areas of governance, with 85% of respondents seeing both areas as ‘very important’ or ‘important’. Tourism planning and sustainability follows at a very close distance covering issues such as unplanned and uncontrolled growth, overcrowding and congestion, and crowding out of traditional residents from areas popular

Figure 5.1: Areas of governance for new platform tourism services





among visitors. Conditions for service providers and the workforce is considered a comparatively lesser important area of governance. Nonetheless, even in this case, 40% of respondents think that it is very important to address this issue. In this context, reference is made to the ongoing process for a draft UNWTO *Convention on the Protection of Tourists and the Rights and Obligations of Tourism Service Providers*.

"It is necessary to introduce suitable and effective policies/measures in order to protect tourists and tourism service providers. Please see relevant provisions in the UNWTO Convention on the protection of tourists and tourism service providers, with which Cyprus fully agrees."

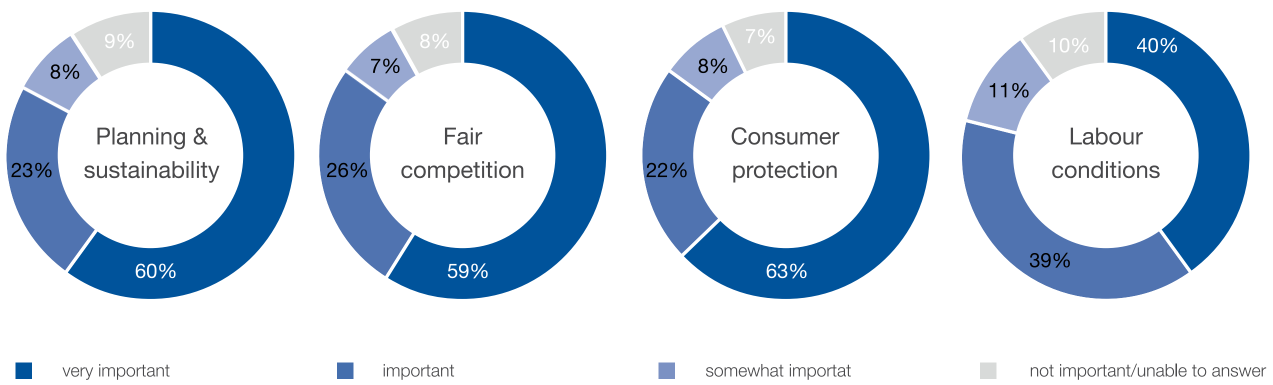
Cyprus Tourism Organization, response to UNWTO survey

Key aspects to consider in the four areas of governance are detailed below:

1. *Tourism planning and sustainability*: tourism services provided through digital platforms can play a role in boosting local economic development, developing neighbourhoods, re-directing tourism flows and offering new employment opportunities for the local communities. When integrated into a responsible and sustainable framework, tourism has a positive effect for local residents and the livelihood of neighbourhoods through the economic activity it creates, the availability of more services, and increased safety. However, when growth is badly managed tourism can have a negative impact on the quality of life of the local populations, to the extent that residents may begin to perceive tourism predominantly

Figure 5.2: Importance of areas of governance

Question E1: How important are the following areas of governance when dealing with these *private tourism services and platforms in your destination/activity? (%)*



in negative terms, as has happened in a few popular destinations. The expansion of new platform tourism services, particularly in the area of accommodation in popular areas can add to this pressure. Key issues and concerns in this respect include, among others:

– Territorial development and urban planning (unplanned spatial distribution, uncontrolled and unsustainable growth);

– Housing pressure (availability and affordability of housing, tourism gentrification and the crowding out of traditional residents, ineffectiveness of zoning);

– Quality of life (overcrowding and congestion, increased tourist traffic in residential areas, nuisance to neighbours and neighbourhoods);

– Issues of cleanliness and waste collection, noise levels;

– Safety and security (theft, vandalism and violence); and

– Environmental protection.

2. *Fair competition and level playing field* refers mainly to the relationship between new private offers and the existing commercial tourism supply. As many transactions are, in fact, commercial, tourism services offered through digital platforms often take the shape of a business, and hence need to be recognised and treated as such. In order to avoid unfair advantages or disadvantages, the new and the traditional offer should compete under comparable conditions, while taking the specific characteristics of their activity into account, such as size and regularity. In particular, there is often a need to address issues with regard to registration, licensing or certification of the activity, and taxation (VAT, income tax, corporate tax, local taxes, etc.). Existing regulation often fails to properly cover or fit private tourism services, and transactions therefore fall into a grey area.

3. *Consumer protection*: When dealing with private suppliers, consumers are generally not protected in the same way when using traditional suppliers. Digital platforms establish guidelines and standards which rely on self-regulation and ‘complaint reporting mechanisms’ to enforce them, meaning that, in many cases, there are no guarantees that private providers and consumers are properly protected. These limitations have been recognised by the platforms themselves.[21] A more in-depth analysis on this subject has been recently published by the European Commission.[22]

In this area, among others, the following aspects should be considered:

– Transparency of information;

– Quality standards;

– Health and safety;

– Privacy;

– Equal treatment (non-discrimination policy);

– Accessibility requirements; and

– Security.

4. *Labour conditions for service providers and workforce*: The supply of tourism services through digital platforms has generated new employment opportunities, in most cases in the form of self-employment. In the same way as consumers have to rely on themselves, this is also true for the providers. It is not always clear what terms and conditions have been agreed between private providers and platforms, as well as what are the rights and obligations to suppliers (as ‘workers’) and consumers. In addition, a ‘second level’ of services is emerging, providing the original suppliers of private services with support services such as cleaning apartments or insuring cars.

21 See note 15.
22 Directorate-General for Justice and Consumers (2017), Exploratory study of consumer issues in online peer-to-peer platform markets, European Commission, Brussels (online), available at: www.ec.europa.eu/newsroom/just/item-detail.cfm?&item_id=77704.

All this may create uncertainty and blurred boundaries in the following extendable areas:

– Working hours and remuneration;

– Health and safety;

– Social legislation, social security and insurance;

– Qualification and training;

– Externalised labour (independent contractors, precarious and undeclared work);

– Insurance, liability and responsibility; and

– Equal treatment (non-discrimination policy, equal opportunities).

5.2 The way forward

Despite the importance attributed to governance issues in the survey, relatively little action has been taken worldwide to address them. The majority of respondents reported that the situation is either being monitored, or research is being planned or undertaken.

Around 40% of respondents report that the situation is being monitored and another 17% to 26% report that specific research is currently being undertaken, particularly in the area of fair competition (36%).

Only few respondents reported about policies being adopted or enforced in their destination (see figure 5.3).

By governance area, 21% of the respondents report that they have taken action with regard to fair competition, 15% have done so regarding consumer protection, 13% regarding planning and sustainability and 12% regarding labour conditions.

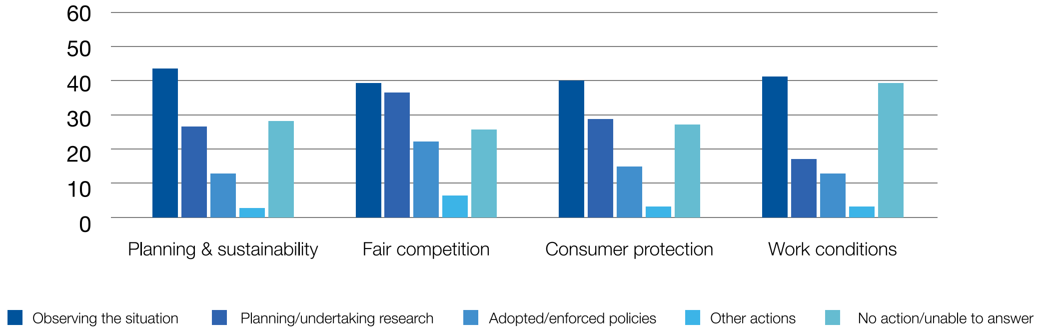
In regard to implementation, only very few governance actions have been reported, and mostly in the areas of 'accommodation' and 'transport' services.

For 'accommodation', and even more so for 'transport', responses show that the focus of actions taken is more on regulation or even on the prohibition of services, while for the other fields – 'information', 'food', and 'tourism activities' – the focus is more on encouragement and adoption. Still, the balance for the areas of 'transport' and 'accommodation' is positive as well.

The majority of governance actions being implemented are not, however, specific to tourism services, but rather concern the adoption of broader regulations in the fields of consumer protection, safety and hygiene, insurance or taxation. These general rules then also apply to the new platform tourism services according to the survey responses. However, due to the grey area between private and commercial tourism services, there seems to be a necessity to stress the applicability and reinforcement of such rules.

Finally, many respondents reported initiatives aimed at exploring and taking advantage of the opportunities digital platforms offer to both private tourism suppliers and to destinations. Online and face-to-face workshops and seminars, as well as studies are helping to identify and exploit the possibilities emerging from these services, often in collaboration with platform operators.

Figure 5.3: Areas of governance: responses (%)



Conclusions

The supply of tourism services through digital platforms is currently a much-debated phenomenon in the tourism sector worldwide. With this in mind, it is essential for stakeholders to identify the different opportunities and challenges and better understand how the new platform tourism services or the so-called sharing economy is shaping and will continue to shape tourism. This report draws on the expertise and experiences of UNWTO Member States, UNWTO Affiliate Members and a selection of destinations.

To date, there have been only very few studies on the issues emerging from the new platform tourism services and the respective policies to address them. Not everything about the so-called sharing economy is new and the empirical evidence available so far suggests that this phenomenon will continue to grow in the tourism sector and as a result needs to be properly understood. Rather than focusing on its conceptualization, it is crucial to identify the key issues arising from the emergence of these services while providing insight into their benefits and future importance.

For the purpose of this study, the new platform tourism services are defined as business models in which products or services are offered through digital platforms to visitors. These can be offered by private individuals or commercial entities and (intermediated) via digital platforms that match demand and supply. New platform tourism services can be found in five main fields – ‘information’, ‘accommodation’, ‘transport’, ‘food’ and other ‘tourism activities’.

It is possible to conclude from the survey that, in terms of relevance among the five areas in analysis ‘information’, ‘accommodation’ and ‘transport’ are the most important services, as they have already transformed the tourism business, and will continue to do so in the future. ‘Food’ and other ‘tourism activities’ services are lagging slightly behind in terms of their market relevance, but are growing in many destinations.

All of the aforementioned fields present their own specific opportunities and challenges according to respondents. However, currently the opportunities seem to far outweigh the challenges and negative effects.

Regarding the way forward, three main conclusions can be drawn from the survey. As highlighted in the

figure below, there is an intricate relationship between the following main lines of action:

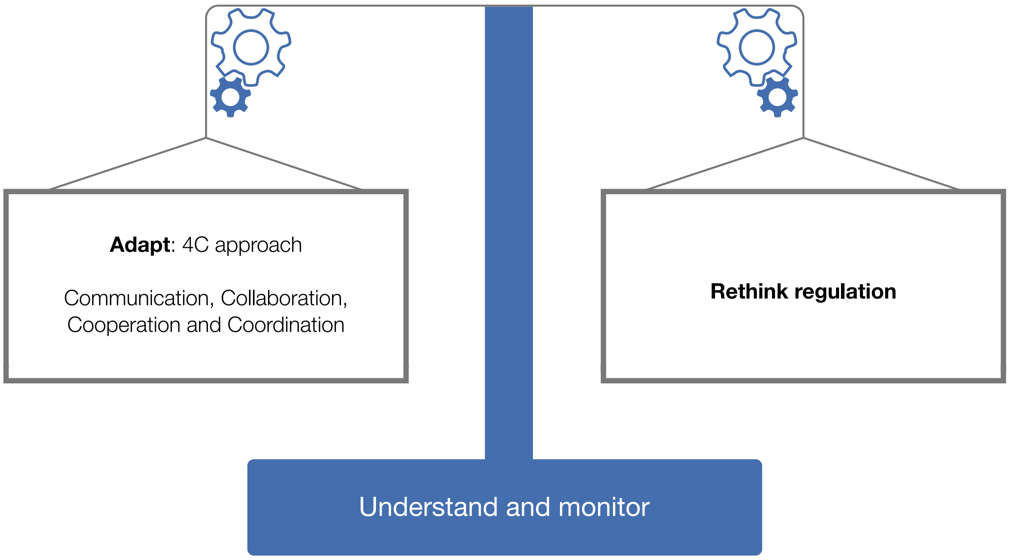
1. Understand and monitor;

2. Adapt following a 4C approach (communication, collaboration, cooperation and coordination); and

3. Rethink regulation

Whilst understanding and monitoring is the base to be built upon, the other two elements in the figure need to be balanced and this needs to be adjusted to each situation and case.

Figure C1: New platform tourism services: the way forward



By starting with a better ***understanding and monitoring*** of the new platform tourism services, stakeholders will undoubtedly be in a better position to take action. Around the world, governments, destinations and the private sector will need to assess the development of these services in the tourism sector, namely through better measurement and further research. This is not only a prerequisite for making informed and evidence-based decisions, but it can also lead to a change in approach and perspective. With objective and valid data, the impact of these services may be assessed more accurately and in more depth, which will allow the various stakeholders to exploit the inherent opportunities. Thus a sound monitoring of market volume and structure needs to be part of the destinations' indicator systems. This is specifically true for accommodation services, and examples show that cooperation and collaboration with the relevant platforms can help in this regard. Another facet of better understanding the phenomenon is to learn from other destinations and their experiences. This is particularly important when discussing and implementing specific regulations tailored to this phenomenon and trying to assess their success.

Secondly, ***adapting*** to the new platform tourism services is one of the main ways forward. This includes a dialogue with all stakeholders, taking a 4C approach – communication, collaboration, cooperation and coordination between:

- Tourism and other government policy areas (transport, foreign affairs, environment, among others);
- National, regional and local authorities;
- Public and private sectors; and
- Tourism stakeholders and local communities.

Thirdly, there is a need to ***review*** and ***rethink*** the current situation and regulatory framework, and to adjust them smartly addressing the interests of all groups of participants involved and affected by these activities – visitors, workers, providers, platforms, competitors and local communities. However, it is essential to recognize that needs and regulations differ widely by destination. Regulation needs to be tailored to suit this new situation, adjusted to each destination's needs and to be proportionate to the scale of operations, a view already shared by other key stakeholders[23].

When rethinking regulation the following issues should be considered:

1. To start with, there is a need to distinguish between:
   - Services that **do not generate an economic benefit** beyond the recovery of costs and generally involve only occasional economic transactions, which can be considered as *true sharing*; and

[23] European Commission (2016), A European agenda for the collaborative economy, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions (online), Brussels, available at: www.ec.europa.eu/growth/single-market/services/collaborative-economy.

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– Services that **generate an economic benefit** beyond the recovery of costs and generally involve frequent or systematic transactions, which can be considered a *commercial activity by private persons or entities*.

2. As long as private tourism services are provided in the domain of *true sharing*, the main focus needs to be on the protection of consumers and local communities. 'Accommodation', 'transport', 'food' and all 'other tourism services' provided within the *true sharing* parameters need to be safe and secure across all stages of the customer journey, from booking and payment up to the actual stay and consumption. Additionally, the impacts on local neighbourhoods and residents are aspects that should be addressed in framing the corresponding regulation.

3. Specifically for private providers who do not act as businesses and have no intentions to start doing so, it is necessary to raise awareness of the existing rules and create simplified procedures to ensure they comply. Some of the regulatory aspects currently being discussed such as evasion of taxes, misuse of lodging space, might not require new regulation, but rather a better enforcement of existing rules. Information campaigns to raise awareness, as well as legal clarity from respective authorities towards private service providers is key to achieve this. In some situations, the registration of providers can be useful in order to avoid negative consequences in terms of consumer protection and rule enforcement. According to respondents, different regulatory frameworks for different segments of the so-called sharing economy seem to be one possible solution.

4. As soon as private individuals act in a commercial way, they need to be treated along comparable lines of regulation as traditional commercial providers. There is no reason why hosts, who make their living from professionally renting apartments via a digital platform, should be treated any differently from comparable apartment or hotel business. Obviously, thresholds need to be defined to separate commercial service providers from those operating in the private domain.

5. In order to be able to differentiate one group from the other, access to platform data and comparisons with other destinations can certainly be helpful. Governments and other relevant authorities can negotiate the monitoring methods with digital platforms and, if need be, the sharing of data in order to ensure compliance with national/regional standards.

It must be clearly recognised, however, that new platform tourism services can provide an opportunity to offer authentic, unique, personalised and affordable experiences to visitors. Thus, over-regulation should also be avoided. The goal must be to ensure a balance between safeguarding public interest and create sufficient room for innovation and entrepreneurship.

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Annex 1 - Survey methodology and participation

UNWTO Member States and Affiliate Members, as well as a selected number of destinations (250), were invited to participate in the global UNWTO survey on *Private tourism services through digital platforms*, which was conducted between December 2016 and March 2017. Respondents received a questionnaire prepared by the UNWTO Secretariat (see annex 2) and could either reply by e-mail or through an online interactive survey system.

A total of 114 responses were collected from all world regions, 62 of these through the online survey system and the remaining 52 through e-mail. About half of all aforementioned responses came from organizations based in Europe, 23% from the Americas and 14% from Asia and Pacific (see figure A1.1). Participants were based in 62 different countries, ranging from Algeria to the United States of America.

The questionnaire was fully structured (i.e. the sequence of questions was fixed), but most questions were open-ended, inviting the respondents to express themselves in their own words (see annex 2). Thus the survey has more the character of an expert interview, collecting viewpoints and contributions to the discussion. In order to allow the submission of more detailed information, an upload function was available for additional documents. The average time used to complete the online survey for online responses was 30 minutes, but some participants took up to an hour to complete the survey. In order to make sure that participants with adequate expertise were selected, addressee were given the opportunity to forward the questionnaire on to someone with more expertise on the subject; 54% of responses came from such respondents. Altogether, this open approach worked quite well and gave a broad and authoritative perspective on the subject has thus been provided.

Most participants (66%) represented the perspective of a particular destination, almost half of these (31% of all respondents) taking the view for a whole country, 25% for a locality or region and the remaining 11% providing a wider perspective (see figure A1.2).

In order to reflect the global character of the audience, three language versions of the questionnaire (English, French and Spanish) were provided. 77% of the responses were given in English (see figure A1.4). Most participants pertain to central governments (including National Tourism Administrations), regional or local DMOs or national tourism organizations (NTOs), but private companies (including the operators of platforms for private tourism services) were also included (see figure A1.3).

Figure A1.1 Respondents by region (%)

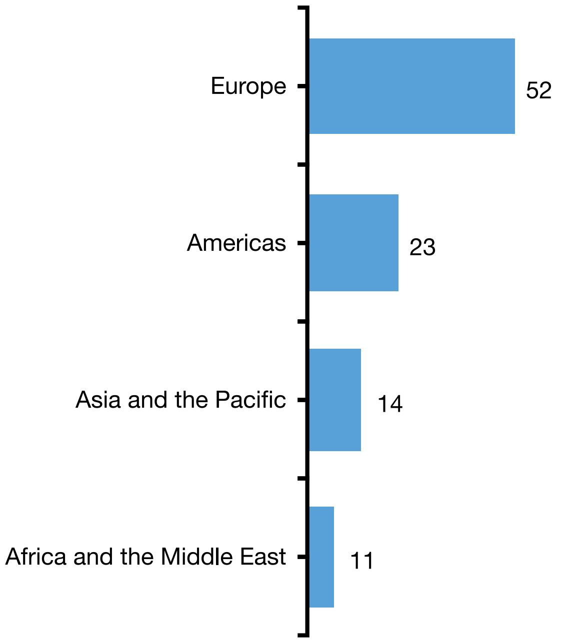


Figure A1.3 Respondents by type of organization (%)

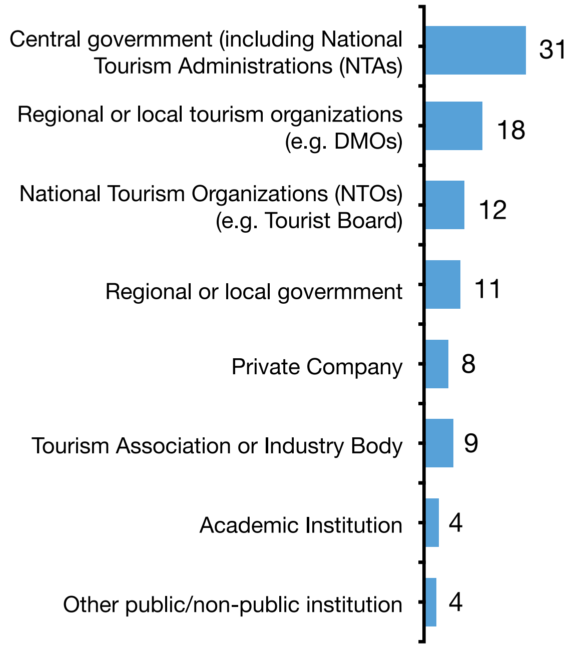


Figure A1.2 Respondents by sector (%)

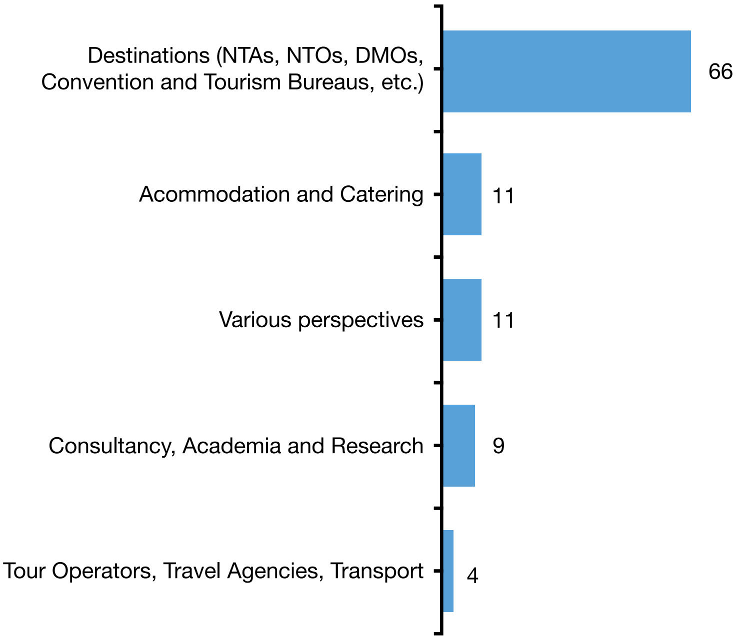
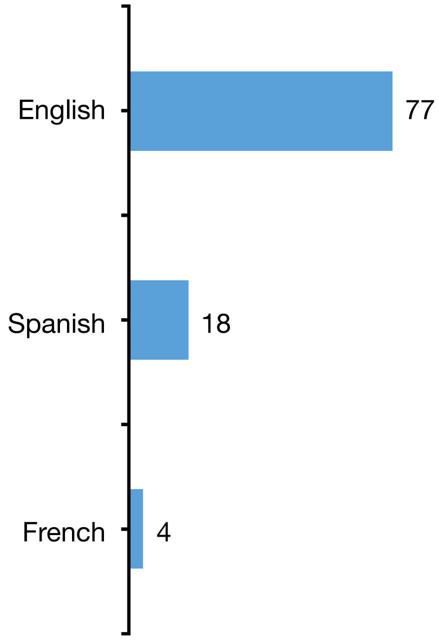


Figure A1.4 Respondents by language (%)



List of countries where participating organizations are based

Africa and Middle East

Algeria
Côte d'Ivoire
Egypt
Kenya
Mauritius
Morocco
Sudan
Togo

Americas

Argentina
Bahamas
Brazil
Chile
Colombia
Costa Rica
Ecuador
Guatemala
Honduras
Mexico
Nicaragua
Paraguay
Peru
Puerto Rico
Seychelles
United States of America
Uruguay

Asia and the Pacific

Australia
China
Iran
Japan
Korea
Malaysia
Maldives
Papua New Guinea
Sri Lanka

Europe

Austria
Belgium
Bosnia and Herzegovina
Bulgaria
Croatia
Cyprus
Czech Republic
Finland
Germany
Greece
Hungary
Israel
Italy
Lithuania
Malta
Monaco
Mongolia
Netherlands
Portugal
Romania
Russian Federation
Spain
Switzerland
Tajikistan
Turkey
Ukraine
United Kingdom

Annex 2 - UNWTO questionnaire on Private tourism services through digital platforms

One of the most recent trends in tourism has been the entry of private tourism services into the areas of ‘information’ (such as TripAdvisor and Yelp), ‘accommodation’ (Airbnb, HomeAway or Couchsurfing), ‘transport’ (Uber, Cabify or BlaBlaCar), ‘food’ (EatWith, Feastly or VizEat) and ‘tourism activities’ (‘things to do’) (BeMyGuest,ToursByLocals or Vayable).

In order to gain insight into the so-called *sharing economy* phenomenon, the UNWTO Secretariat is conducting a survey on *Private tourism services through digital platforms*. This survey intends to explore the role and impact of private tourism services, the opportunities and challenges these can present, and how these issues are being addressed by many destinations. The present survey will provide valuable data on this topic.

Thank you in advance for taking the time to complete the questions below.

Instructions:

- We would appreciate it if your answers contain as much detail as possible, as it is important that they reflect your opinion as accurately as possible.

- Questions in sections A to G deal with the entry of private tourism services into digital platforms in your activity/destination. Questions in section H focus on the discussion paper produced by the UNWTO Tourism Market Trends Programme regarding this topic.

- Your answers may be treated confidentially if you so wish. At the end of this survey you can indicate whether your organization can be named in the survey report, or whether your responses should be dealt with anonymously.

- We kindly ask you to return the present survey, duly completed, by 20 January 2017.

If you have any further questions or need any assistance with the survey, please do not hesitate to contact marketing at unwto.org.

Thank you in advance for your kind collaboration, and we look forward to sharing the results of this project with you in the near future.

A Perspective

In answering this survey, we kindly ask you to take the perspective of the destination in which you operate and/or the activity you are working in.

A1 Location/destination

A1 a) Where are you based?

Please state the city and country.

____

A1 b) What is the geographical focus of your activity?

Please choose the most appropriate one.

1. If a country, please specify:

   ____

2. If a locality/region (within a country), please specify:

   ____

3. If wider, please select below:
   - a) UNWTO regions (please select all that apply): ☐
     - Africa ☐
     - Americas ☐
     - Asia and the Pacific (including Oceania) ☐
     - Europe ☐
     - Middle East ☐
   - b) worldwide ☐

A2 Type of organization

In case you are representing more than one type of organization, please choose the one that has been invited to participate in the survey.

Public administration/tourism organization:

1. Central government, including national tourism administrations (NTAs) ☐
2. National tourism organization (NTO), e.g., tourist board ☐
3. Regional or local government ☐
4. Regional or local tourism organizations, e.g., destination management organizations (DMOs) ☐
5. Other public institution (please specify):

   __________________________________ ☐

Other. Public or private organization:

6. Private company ☐
7. Tourism association or industry body ☐
8. Academic institution ☐

9. Consultancy ☐
10. Other (please specify): ☐

____

A3 Type of activity

Please choose the most appropriate.

1. Destinations (NTA, NTO, DMO, convention and tourism bureau, etc.) ☐
2. Accommodation and catering ☐
3. Tour operators and travel agencies ☐
4. Transport ☐
5. Activities, entertainment and cultural services ☐
6. General industry bodies ☐
7. Consultancy, academia and research ☐
8. Other (please specify): ☐

____

B Overall rating

B1 How do you rate the *current importance* of private tourism services through digital platforms for your destination/activity?

Please give a rating for each of the sectors below in relation to your destination/activity.

	not present	present, but not important	somewhat important	important	very important
1. **Information** (e.g., TripAdvisor or Yelp)					
2. **Accommodation** (e.g., Airbnb, HomeAway or Couchsurfing)					
3. **Transport** (e.g. Uber, Cabify or BlaBlaCar)					
4. **Food** (e.g. EatWith, Feastly or VizEat)					
5. **Things to do** [Tourism activities] (e.g. BeMyGuest, ToursByLocals or Vayable)					
6. **Other category** (please specify below)					

B2 If ‘Other category’, please specify.

____

C Private tourism services

C1 Information

Please answer questions C1.1 to C1.3 *only* if platforms in the field of 'information' are present in your destination/activity.

C1.1 Please specify which digital platforms are active in the field of 'information'.

____

C1.2 From your perspective:

Do private tourism services offered through digital platforms in the field of 'information' generate specific *opportunities and/or challenges* for your destination/activity?

Yes: ☐
No: ☐

C1.3 If 'yes', could you please *specify* the opportunities and/or challenges generated in the field of 'information'?

____

C1.4 Has any action been taken by your organization or any other organization(s) in relation to these opportunities and/or challenges?

Please select all answers that apply.

1. Yes, my organization has taken action relating to these opportunities and/or challenges ☐
2. Yes, another organization/other organizations have taken action relating to these opportunities and/or challenges ☐
3. No action has been taken so far ☐

C1.5 If 'yes', please give examples of what action has been taken.

____

C2 Accommodation

Please answer questions C2.1 to C2.3 *only* if platforms in the field of 'accommodation' are present in your destination/activity.

C2.1 Please specify which digital platforms are active in the field of 'accommodation'.

____

C2.2 From your perspective:

Do private tourism services offered through digital platforms in the field of 'accommodation' generate specific *opportunities and/or challenges* for your destination/activity?

Yes: ☐
No: ☐

C2.3 **If 'yes', could you please *specify* the opportunities and/or challenges generated in the field of 'accommodation'?**

____

C2.4 **Has any action been taken by your organization or any other organization(s) in relation to these opportunities and/or challenges?**
Please select all answers that apply.

1. Yes, my organization has taken action relating to these opportunities and/or challenges ☐
2. Yes, another organization/other organizations have taken action relating to these opportunities and/or challenges ☐
3. No action has been taken so far ☐

C2.5 **If 'yes', please give examples of what action has been taken.**

____

C3 Transport

Please answer questions C3.1 to C3.3 *only* if platforms in the field of 'transport' are present in your destination/activity.

C3.1 **Please specify which digital platforms are active in the field of 'transport'.**

____

C3.2 **From your perspective:**
Do private tourism services offered through digital platforms in the field of 'transport' generate specific *opportunities and/or challenges* for your destination/activity?

Yes: ☐
No: ☐

C3.3 **If 'yes', could you please *specify* the opportunities and/or challenges generated in the field of 'transport'?**

____

C3.4 **Has any action been taken by your organization or any other organization(s) in relation to these opportunities and/or challenges?**
Please select all answers that apply.

1. Yes, my organization has taken action relating to these opportunities and/or challenges ☐
2. Yes, another organization/other organizations have taken action relating to these opportunities and/or challenges ☐
3. No action has been taken so far ☐

C3.5 If 'yes', please give examples of what action has been taken.

____

C4 Food

Please answer questions C4.1 to C4.3 *only* if platforms in the field of food are present in your destination/activity.

C4.1 Please specify which digital platforms are active in the field of 'food'.

____

C4.2 From your perspective:

Do private tourism services offered through digital platforms in the field of 'food' generate specific *opportunities and/or challenges* for your destination/activity?

Yes:
No:

C4.3 If 'yes', could you please *specify* the opportunities and/or challenges generated in the field of 'food'?

____

C4.4 Has any action been taken by your organization or any other organization(s) in relation to these opportunities and/or challenges?

Please select all answers that apply.

1. Yes, my organization has taken action relating to these opportunities and/or challenges ☐
2. Yes, another organization/other organizations have taken action relating to these opportunities and/or challenges ☐
3. No action has been taken so far ☐

C4.5 If 'yes', please give examples of what action has been taken.

____

C5 Things to do ['tourism activities'].

Please answer questions C5.1 to C5.3 *only* if platforms in the field of 'things to do' ['tourism activities'] are present in your destination/activity.

C5.1 Please specify which digital platforms are active in the field of 'things to do' ['tourism activities'].

____

C5.2 From your perspective:

Do private tourism services offered through digital platforms in the field of 'things to do' ['tourism activities'] generate specific *opportunities and/or challenges* for your destination/activity?

Yes: ☐
No: ☐

C5.3 **If yes, could you please *specify* the opportunities and/or challenges generated in the field of 'things to do' ['tourism activities']?**

____

C5.4 **Has any action been taken by your organization or any other organization(s) in relation to these opportunities and/or challenges?**
Please select all answers that apply.

1. Yes, my organization has taken action relating to these opportunities and/or challenges ☐
2. Yes, another organization/other organizations have taken action relating to these opportunities and/or challenges ☐
3. No action has been taken so far ☐

C5.5 **If 'yes', please give examples of what action has been taken.**

____

C6 Other category [__________]

Please answer questions C6.1 to C6.3 *only* if platforms in the field of [__________] are present in your destination/activity.

C6.1 **Please specify which digital platforms are active in the field of [__________].**

____

C6.2 **From your perspective:**
Do private tourism services offered through digital platforms in the field of [__________] generate specific *opportunities and/or challenges* for your destination/activity?

Yes: ☐
No: ☐

C6.3 **If yes, could you please *specify* the opportunities and/or challenges generated in the field of [__________]?**

____

C6.4 **Has any action been taken by your organization or any other organization(s) in relation to these opportunities and/or challenges?**
Please select all answers that apply.

1. Yes, my organization has taken action relating to these opportunities and/or challenges ☐
2. Yes, another organization/other organizations have taken action relating to these opportunities and/or challenges ☐
3. No action has been taken so far ☐

C6.5 **If 'yes', please give examples of what action has been taken.**

____

D Effects and future importance

D1 How do you rate the current *overall effect* of private tourism services through digital platforms for your destination/activity?

Please give a rating for each of the sectors below if present in your destination/activity.

	Very negative	More negative than positive	Neutral, balanced	More positive than negative	Very positive	Unable to answer
1. **Information** (e.g., TripAdvisor or Yelp)						
2. **Accommodation** (e.g. HomeAway or Couchsurfing)						
3. **Transport** (e.g. Uber, Cabify or BlaBlaCar)						
4. **Food** (e.g. EatWith, Feastly or VizEat)						
5. **Things to do** [Tourism activities] (e.g. BeMyGuest, ToursByLocals or Vayable)						
6. **Other** (as specified in B2)						

D2 From your perspective, how would you rate the *future importance* (in the next five to ten years) of these private tourism services for your destination/activity?

Please give a rating for each of the sectors below.

	Much less important than today	Less important than today	No change	More important than today	Much more important than today
1. **Information**					
2. **Accommodation**					
3. **Transport**					
4. **Food**					
5. **Things to do** [Tourism activities]					
6. **Other** (as specified in B2)					

E Governance

The growth of private services in tourism through digital platforms can give rise to a number of governance issues.

E1 How important are the following areas of governance when dealing with these private tourism services and platforms in your destination/activity?

	Much less important than today	Somewhat important	Important	Very important
1. **Fair competition and market conditions, maintaining a level playing field** (e.g. regulation, taxation, etc.)				
2. **Consumers protection** (e.g. quality, safety, privacy, etc.)				
3. **Labour conditions of the work force** (e.g. hours and remuneration of Airbnb hosts, Uber drivers, social legislation, insurance and responsibility, etc.)				
4. **Public sector and civil society: tourism planning and sustainability** (e.g. urban planning and housing, quality of life of residents, overcrowding and congestion, nuisance to neighbours and neighbourhood, etc.)				

E2.1 Fair competition and market conditions, maintaining a level playing field (e.g. regulation, taxation, etc.):
What has been the response so far in your destination/activity with regard to private tourism services and platforms?
Please select all answers that apply.

1. None so far ☐
2. We are observing the situation ☐
3. We are planning or undertaking research ☐
4. We have adopted and/or enforced policies ☐
5. Other (please specify): ☐
   ____

E2.2 If relevant policies have been planned and/or adopted, please specify the nature and effectiveness of these policies.

____

E3.1 Consumer protection (e.g. quality, safety, privacy, etc.):

What has been the response so far in your destination/activity with regard to private tourism services and platforms?

Please select all answers that apply.

1. None so far ☐
2. We are observing the situation ☐
3. We are planning or undertaking research ☐
4. We have adopted and/or enforced policies ☐
5. Other (please specify): ☐

   ____

E3.2 If relevant policies have been planned and/or adopted, please specify the nature and effectiveness of these policies

____

E4.1 Labour conditions of the work force (e.g. hours and remuneration of Airbnb hosts, Uber drivers, social legislation, insurance and responsibility, etc.):

What has been the response so far in your destination/activity with regard to private tourism services and platforms?

Please select all answers that apply.

1. None so far ☐
2. We are observing the situation ☐
3. We are planning or undertaking research ☐
4. We have adopted and/or enforced policies ☐
5. Other (please specify): ☐

   ____

E4.2 If relevant policies have been planned and/or adopted, please specify the nature and effectiveness of these policies.

____

E5.1 Public sector and civil society: tourism planning and sustainability (e.g. urban planning and housing, quality of life of residents, overcrowding and congestion, nuisance to neighbours and neighbourhood, etc.):

What has been the response so far in your destination/activity with regard to private tourism services and platforms?

Please select all answers that apply.

1. None so far ☐
2. We are observing the situation ☐
3. We are planning or undertaking research ☐
4. We have adopted and/or enforced policies ☐
5. Other (please specify): ☐

____

E5.2 If relevant policies have been planned and/or adopted, please specify the nature and effectiveness of these policies.

____

E6 Are there any other relevant areas of governance that you consider important?
If so, please specify.

____

F The way forward

Please provide us with your recommendations or suggestions for future tourism policies relating to private tourism services through digital platforms for the fields that are relevant for your destination/activity.

F1 Information

____

F2 Transport

____

F3 Accommodation

____

F4 Food

____

F5 Things to do [tourism activities]

____

F6 Other fields (please specify)

____

G Case studies

G1 **This research also aims at identifying relevant case studies. Do you have any case study (e.g. destination, digital platform) to recommend in this regard?**
If so, please indicate below.

A case study could be either a solution for a specific challenge arising from, or a specific insight into the mechanisms of private tourism services through digital platforms.
If you would like to provide us with any additional information on relevant case studies, please attach/forward any relevant documents via e-mail marketing2@unwto.org.

G2 **If you are interested in providing additional details on this subject, please provide your contact details below, and we will contact you shortly.**

H Discussion paper

The UNWTO Tourism Market Trends Programme has prepared a discussion paper, which has been sent to you with the invitation e-mail.

H1 **The discussion paper summarizes our key ideas on the topic. What is your overall impression:**
Do you think the discussion paper attached covers the key ideas sufficiently?

Yes: ☐
No: ☐

H2 **If 'no', please share with us what you think would make it more complete.**

H3 **To what extent do you agree with the ideas in the discussion paper?**

1. Strongly disagree ☐
2. Mostly disagree ☐
3. Mostly agree ☐
4. Strongly agree ☐
5. Neither agree nor disagree ☐

H4 **If you disagree, please specify which ideas you disagree with.**

H5 Please share with us any general comments or suggestions on the discussion paper attached.

____

I Organizational data

I1 Your name:

____

I2 Name of your organization or company:

____

I3 Your position within the organization or company:

____

I4 Your telephone number:

____

I5 Your e-mail address:

____

I6 Have you been contacted directly by UNWTO, or has the survey/invitation been forwarded to you?

1. I was contacted directly by UNWTO ☐
2. The survey/invitation has been forwarded to me ☐

I7 Confidentiality

1. My organization can be identified in this report with the answers given ☐
2. Answers given in this survey should be dealt with anonymously ☐

We greatly appreciate your time and efforts in completing this survey.

Thank you!

Annex 3 - Survey results

Current importance of new platform tourism services

Table A3.1: Current importance of new platform tourism services by region

Current importance (very) important (in %)	Africa and Middle East	Americas	Asia and the Pacific	Europe
n = number of respondents	13	26	16	59
Information	62	96	88	80
Accommodation	38	77	63	69
Transport	31	62	50	37
Food	38	35	31	19
Tourism activities	23	27	38	22

Table A3.2: Current importance of new platform tourism services by type of organization

Current importance (very) important (in %)	National (government or tourism organization)	Regional/local (government or tourism organization)	Other organizations
n = number of respondents	49	33	32
Information	78	79	94
Accommodation	54	64	84
Transport	47	30	53
Food	24	21	34
Tourism activities	24	21	31

Overall effect of new platform tourism services

The ***balance score*** is the share (in %) of respondents who give a (very) positive rating minus the share (in %) of respondents who give a (very) negative rating.

Balance score = % (very) positive – % (very) negative

If the score is *positive*, more respondents gave a positive rating than a ***negative*** rating. If the score is negative, more respondents gave a negative rating than a positive rating. The score can range from:

– 100 = all respondents give a negative rating to + 100 = all respondents give a positive rating).

A score of 0 means that the percentages of respondents with positive or negative ratings are the same size.

Table A3.3 Overall effect of new platform tourism services by region

Current importance (very) important (in %)	Africa and Middle East	Americas	Asia and the Pacific	Europe
n = number of respondents	13	26	16	59
Information	+ 85	+ 84	+ 88	+ 75
Accommodation	+ 46	+ 23	+ 63	+ 32
Transport	+ 38	+ 54	+ 56	+ 34
Food	+ 54	+ 19	+ 31	+ 31
Tourism activities	+ 38	+ 42	+ 38	+ 36

Table A3.4 Overall effect of new platform tourism services by type of organization

Current importance (very) important (in %)	National (government or tourism organization)	Regional/local (government or tourism organization)	Other organizations
n = number of respondents	49	33	32
Information	+ 88	+ 64	+ 85
Accommodation	+ 43	+ 30	+ 31
Transport	+ 45	+ 27	+ 53
Food	+ 33	+ 21	+ 38
Tourism activities	+ 35	+27	+ 53

Future importance of new platform tourism services

Table A3.5 Future importance of new platform tourism services by region

Current importance (very) important (in %)	Africa and Middle East	Americas	Asia and the Pacific	Europe
n = number of respondents	13	26	16	59
Information	+ 92	+ 96	+ 94	+ 84
Accommodation	+ 85	+ 100	+ 100	+ 80
Transport	+ 85	+ 96	+ 100	+ 81
Food	+ 92	+ 85	+ 69	+ 78
Tourism activities	+ 69	+ 88	+ 75	+81

Table A3.6 Future importance of new platform tourism services by type of organization

Current importance (very) important (in %)	National (government or tourism organization)	Regional/local (government or tourism organization)	Other organizations
n = number of respondents	49	33	32
Information	+ 96	+ 76	+ 97
Accommodation	+ 92	+ 76	+ 91
Transport	+ 96	+ 67	+ 88
Food	+ 86	+ 70	+ 81
Tourism activities	+ 84	+ 76	+ 81

List of acronysm and abbreviations

B2B	business-to-business
B2C	business-to-consumer
C2C	consumer-to-consumer
CANATUR	Costa Rica National Chamber of Tourism
Confebus	Confederation for Bus Transport in Spain
CRS	computer reservation system
DMO	destination management organisation
EXCELTUR	Alliance for Excellency in Tourism
FEDETUR	Federation of Tourism Companies of Chile
FEGHRA	Federación Empresaria Hotelera Gastronómica de la República Argentina
GDS	global distribution system
GPS	global positioning service
HOTREC	The Confederation of National Associations of Hotels, Restaurants, Cafés and Similar Establishments in the European Union and European Economic Area
ICT	information and communications technology
MINCETUR	Ministry of Foreign Trade and Tourism in Peru
OECD	Organisation for Economic Co-operation and Development
OTA	online travel agency
P2P	peer-to-peer
SME	small and medium entreprise
STEEPLED	social, technological, economic, environmental, political, legal, ethical and demographic (analysis)
UNWTO	World Tourism Organization
VAT	value added tax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