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## SHARING ECONOMY IN THE TOURISM MARKET: OPPORTUNITIES AND THREATS

### Summary

This article aims to review the existing investigations concerning the sharing economy in tourism and to attempt an interdisciplinary presentation of the size and specific characteristics of this phenomenon in the tourism market. The study discusses the main determinants of the sharing economy idea in tourism, the scope of consumer acceptance and assessment of this phenomenon (own survey results) and indicates inevitable consequences of changing needs, not only in the service market but also in the labour market. Drawing on the results of previous research, the article focuses on competition methods employed by enterprises, the use of creativity and innovation in tourism, the ways of using cost advantages (including by cutting the costs of 'red tape' and intermediaries). The discussion of the current situation in the tourism market also indicates activities undertaken in order to protect the existing competitive positions of traditional tourism businesses. It compares certain aspects of the phenomenon development in Poland and Ukraine.

**Keywords:** tourism, competitiveness in the tourism market, sharing economy, collaborative consumption.

**JEL codes:** L83

### Introduction

The emergence and remarkably dynamic development of new business models, based on broader collaborative and sharing economy concepts, has been modifying the rules of the functioning of enterprises operating in the leisure industry, including in the tourism market, and changing competition conditions. A review of the literature reveals a wide variety of approaches to this issue, the phenomenon is understood in various ways as well; therefore, there is no agreement as to its unequivocal definition. In the literature, the notions used include the sharing economy, the collaborative economy, employees' profit-sharing arrangement, collaborative consumption, frequently used interchangeably. On the basis of the main idea introduced by Rachel Botsman, 'access over ownership', various authors seek an answer to the question whether,

to what extent and on what conditions groups of individuals are inclined to act together and in agreement for the purpose of obtaining mutual benefits rather than individual benefits (Ostrom; Olson; Botsman & Rogers; Zieliński) or to act in order to make better use of underutilised resources. Interestingly, surveys carried out by PricewaterhouseCoopers (*The Sharing Economy* 2015) suggest that more than half of the respondents consider temporary access to goods or services to be a new type of ownership.

There are two main dimensions of the sharing economy (including collaborative consumption) usually distinguished in the literature: consumer-oriented and community-oriented (Botsman, Rogers 2010; 2011; Ejsmont, Ruszewski 2013), whereas collaborative consumption is understood as the shared use of goods and services with a view to improving the quality of life of individuals, satisfying the needs of a group and creating a new quality of social relations in a community. An important and frequently emphasised objective is also making better use of resources, thus environmental friendliness. Therefore, the sharing economy concepts are identified as mutualised access to a product, in contrast to the need to own one by each individual. Such access may be based on non-profit or profit-oriented exchange (the respective examples in the tourism market can be BlaBlaCar and Airbnb). Despite the lack of definitions agreed by scholars and practitioners, three models of the sharing economy are most frequently discussed in the literature. Those are as follows: product-service systems, redistribution markets and collaborative lifestyles. Frenken (2015) additionally points to the fact that they are based on one of the following three concepts: providing goods or services, granting access to resources and consumer-to-consumer (*Peer-to-Peer*, P2P) platforms.

Despite a rising number of scientific investigations (Ert, Fleicher, Magen 2016; Fang, Ye, Law 2016) and empirical studies carried out by research and consulting institutions (McKinsey&Co. 2016; PWC 2016; LSE Consulting 2016; ITB World Travel Trends Report 2016/2017 etc.) as well as media discussions (Cheng 2016; Heo 2016), the social and economic potential of the sharing economy in tourism remains not explored thoroughly enough, although the phenomenon in question particularly concerns tourism; one may venture to say that the body of knowledge on the subject is incomplete, chaotic and unstructured. This lack of order refers to both the idea of social entrepreneurship in tourism, essentially promoting the building of civil society and undertaken for social benefit, and to studies of the phenomenon in question as a special tool for reducing unfavourable developments and social problems, frequently an opportunity for groups and communities at risk of poverty (e.g. families of persons with disabilities), lack of access to employment and exclusion (Fang, Ye, Law 2016).

The development of information technology as a major pillar of the rise of sharing economy concepts, especially the availability of the so-called Meta Search Engines, also used by tourism businesses (Markiewicz, Pędziński,

Skalska 2016), the rivalry of economic operators for competitive positions in the tourism market takes ever-new forms. Enterprises use various methods and measures in order to survive in the market and to increase profits. New entrants operating based on sharing economy ideas and supplying on a large scale accommodation and other services outside the traditional tourism sector subject to legal regulations (e.g. Airbnb, Couchsurfing, HomeAway) have been creating new conditions of competitiveness and changing the market structure (Goren 2015; HR&A, HR&A report 2015; ITB World Travel Trends Report 2016/2017). It is a breakthrough phenomenon having a real impact on the functioning of the existing enterprises in the tourism market; furthermore, it must be emphasised that the emergence of new business models based on the sharing economy concept poses an increasing challenge to traditional tourism firms. Individuals providing services based on the idea, usually micro-entrepreneurs, by sharing/jointly using resources and satisfying consumer needs by providing access rather than transferring ownership (Bard hi, Kharkov 2012), gain strong cost-based competitive advantages, especially by cutting intermediation and distribution expenses. In such a situation, the main traditional tools of competition in this market include prices but it is worth noting that the starting point in economic decision making by consumers is utility (consumer satisfaction, business profit), measured in relation to the price to be paid, rather than the price itself (Skalska, 2014; Heckscher, Skalska 2016; Becket et al. 2013; Simon 1996).

In tourism, the rivalry in customer acquisition, also by means of pricing, may concern both individual economic operators and tourism destinations. In both cases, it is important to choose one of a variety of available strategic options and to decide whether to compete by attempting to gain a utility-based advantage (e.g. product attractiveness, high quality, an elite nature or other such characteristics or a price and cost advantage (a low-priced product with low production costs). Therefore, the considerable role of this economic instrument in controlling the tourism market, including demand, as well as the possibility to use it in business management and in promoting tourism services, whether supplied by traditional tourism enterprises or sharing economy entities, cannot be underestimated. It concerns both the enterprise and tourism destination levels. The problem of price competition, especially within new business models, although of key importance to market players, is not often addressed in empirical surveys; it is even less frequent for studies to cover the issue of the price in relation to the utility of a product/service (Skalska, Heckscher 2016).

The article aims to review the existing investigations concerning the sharing economy in tourism and to attempt an interdisciplinary presentation of the size and specific characteristics of this phenomenon in the tourism market, with a focus on its state as observed in Poland and – with regard to certain aspects – in Ukraine. The study discusses the main determinants of the sharing economy idea in tourism, consumer acceptance and assessment of this phenomenon (own

survey results) and indicates inevitable consequences of changing needs, not only in the service market but also in the labour market. Drawing on the results of previous research, the article focusses on competition methods employed by enterprises, the use of creativity and innovation in tourism, the ways of using cost advantages (including by cutting the costs of 'red tape' and intermediaries). The discussion of the current situation in the tourism market also indicates activities undertaken in order to protect the existing positions of traditional tourism businesses.

### **Position of new entrants in the tourism market: controversy surrounding the phenomenon**

In recent years, the development of sharing economy concepts in the tourism market has mostly involved the emergence of businesses such as Airbnb, BlaBlaCar, Couchsurfing, HomeAway, etc., operating not only in the provision of accommodation and transport services but also in the supply of food- and beverage-serving and tour guide services (EatWith, Vocale). Those are global portals, intermediates between service providers and consumers (tourists), certainly disrupting the previous functioning of the tourist accommodation and transport service sector and, over time, transforming into new profit-oriented business models. Assessments of their importance to the current and future market structure are not unambiguous. In the opinion of various market observers and analysts (ITB World Travel Trends Report 2016/2017), despite a steep rise in the number of accommodation places provided by Airbnb, Couchsurfing, HomeAway and similar service providers, they still account for a relatively insignificant share of the tourism market. On the other hand, however, even though in 2015 foreign trips during which the Europeans used accommodation services purchased through such platforms merely represented 3%, in cities such as Amsterdam, London, Berlin and Madrid they play a much greater role. For instance, in Amsterdam and London the share of Airbnb in the accommodation market was 10% and 7.6%, respectively, in 2015 (Ibidem).

Major determinants of the sharing economy in tourism include the following: environmental factors (sustainable consumption), the importance of the community and authenticity, the global economic crisis and technological factors (Markiewicz, Pędziński, Skalska 2016). With regard to the environmental protection, a 2014 survey carried out by PricewaterhouseCoopers in the US market suggests that as many as 76% of the respondents assessed the idea of sharing as favourable for the environment (*The Sharing Economy* 2015). Undoubtedly, another driver of growth is the service providers' orientation to increase their personal incomes or even to create jobs for themselves (Mandatory

J. et al. 2016); it is of particular importance to less developed countries, with sluggish economies, especially with stagnant wages and job opportunities (ibidem).

In the new market situation that we certainly witness, the competitive positions of traditional tourism enterprises are being dramatically changed by the two parallel and continuously strengthening forces mentioned above. Those include information technology, supporting not only the process of service reservation but also the distribution of information and recommendations through *bloggers* and social media (it is worth noting that Google has joined in lately) as well as changes of consumer needs and behaviour towards an increased interest in customised services and authentic experiences. But this phenomenon is not free from controversy and market changes have been perceived as very ambiguous: on the one hand, supported by customers, especially young people who appreciate the end result of services rendered and, on the other hand, criticised as a destructive economic force, or even overtly condemned by existing traditional market players as a very serious and unfair threat to competition.

According to a number of studies and observations of ongoing changes, the real-life behaviour of service providers is increasingly closer to typical profit-oriented activities, deviating from the idea of sharing or exchanging unused resources and creating authentic, close relations between tourists and hosts (ITB World Travel Trends Report 2016). The above is reflected in the results of surveys conducted in four European cities characterised by significant shares of accommodation services provided through the platforms in question; those suggest, for example, that more than 82% of accommodation places rented through Airbnb are independent residential units, rented as the entire property, whereas private or shared rooms only account for ca. 18%. Over 80% of the accommodation is available for rent for more than 31 days, many hosts list multiple properties (flats/houses), receiving a prevailing share of revenue (Ibidem). A similar phenomenon is pointed out by the authors of the World Travel Monitor (KIP International 2015), suggesting that the structure of the accommodation available for rent through Airbnb contradicts the idea of the sharing economy and indicates a typically commercial orientation of this operating model. Thus, as many as 64% of accommodation facilities booked through such platforms by Europeans on outbound trips were apartments, flats, villas and holiday homes, whereas boarding houses and budget hotels represent another 18%. According to the results of own empirical studies, described in detail below, show that the scope of additional services offered by hosts, e.g. dinner/lunch with guests, guided city tours, preparing breakfast, providing transfer between the airport/railway station and the accommodation, indicates closer and more authentic contact between the host and the guest.

Both the above-mentioned structure of accommodation available for rent and Airbnb activities announcing expansion towards a new platform including

not only accommodation but also destination services (tourist information), local activities (e.g. guided tours) and tourist transport allow to assume that the platform is slowly transforming into an Online Travel Agency (OTA), supplying various services within a single application. Therefore, Airbnb is becoming a business concept using and incorporating the sharing economy idea into typical commercial activities.

Controversy surrounding the phenomenon is also raised by the impact of mass provision of accommodation resources by Airbnb, Couchsurfing and similar portals on changing functions of city centres, particularly of a monumental nature, where residents renting accommodation to tourists are increasingly replaced (displaced) by them. In such a situation, city centres are gradually becoming tourist ghettos.

Assessments of the threat posed by Airbnb to the hotel industry vary (PAPI 2014; ITB World Travel Trends Report 2016). According to the 2016 survey carried out by Pędzierski among Polish hotel-keepers, every fourth respondent has no knowledge of platforms such as Airbnb, whereas two-thirds see no current threat to the financial performance of their hotels arising from the rising popularity of those platforms; a mere half believe that in the future such booking platforms may become significant competitors for hotels. Neither do the respondents see threats following from the use of such services by corporate customers. As few as 42% of the surveyed hotel-keepers took account in their marketing and sales plans of increasing accommodation facilities offered by reservation platforms based on the sharing economy model (Pędzierski 2016, unpublished surveys). In addition, assessments by tourism market experts presented in the ITB World Travel Trends Report (ITB World Travel Trends Report 2016) seem to underestimate the competitive threat, merely indicating that in London Airbnb apparently increases its market share; otherwise, the undertaking is a threat to city functions rather than to the hotel industry. In response to those threats, central, regional and local government institutions take certain regulatory measures aimed at structuring the sharing economy and collaborative consumption, structuring the space which has emerged between creativity and entrepreneurship on the one hand and the need to introduce formal regulations on the other hand. In particular, the above tasks concern the hotel market (Airbnb, HomeAway) and transport used in tourism (BlaBlaCar). For example, in 2016, the authorities of Barcelona imposed considerable fines on Airbnb and HomeAway, intermediaries in the rental of private accommodation facilities without the required licences. At the same time, it is worth stressing that an analysis of information provided on the Airbnb platform on its Ukrainian activities reveals that it operates primarily in large cities (Kiev, Odessa, Kharkov, Lvov, etc.); there tend to be several listings for smaller cities and certain towns. Another platform, well-known in Poland, BlaBlaCar, is rarely used in Ukraine.

## Determinants of the fact and frequency of using sharing economy services in tourism: empirical survey results

Empirical studies<sup>1</sup> carried out among users of platforms intermediating the provision of services, e.g. Airbnb, Couchsurfing, Uber, BlaBlaCar and EatWith, allow to analyse the determinants of the fact and frequency of their use by tourists and to identify the reasons why consumers representing different market segments choose services provided via such portals (prices, ease of reservation, a wide range of services, authenticity etc.). The survey also attempted to assess the quality of services supplied within the new business models relative to prices. The survey also aimed to establish the knowledge of the issue of the sharing economy in tourism, users of services provided by platforms based on the sharing economy concepts, the assessment of such platforms and the determinants of the choice of services supplied by such platforms in tourism.

The survey was conducted using the PAPI method as well as online and covered a total of 249 persons. In reply to the question concerning the awareness of the phenomenon, nearly 40% of the respondents described it as superficial. The best-known concepts appeared to be the *sharing economy* (33% of indications), the *collaborative economy* (29%), *collaborative economics* (28.6%). Fewer respondents indicated the *peer-to-peer economy* (8% of indications) and the *mesh economy* (4.4%). The survey results are not significantly different from those carried out by other research institutions. For instance, according to the *Goldman Sachs Global Investment Research*, at the end of 2015 35% of those surveyed declared to be aware of the phenomenon; the awareness increased every quarter of the year (Schneider et al. 2016). Despite barely knowing the nature of the phenomenon, the vast majority of the respondents (66.1%) used platforms operating based on the new business models. Those were usually young and educated dwellers of cities (with a population over 100,000)<sup>2</sup>. The most frequently used platforms were those enabling the exchange of transport services (BlaBlaCar: 85.1% of indications and Uber: 79.4%), followed by accommodation services (Airbnb: 40.3% of indications and Couchsurfing: 27%). It must be pointed out that relatively well-known and used platforms were intermediaries in the provision of tour guide services (e.g. GoForGuide, GetYourGuide) and food- and beverage-serving services (EatWith, Vizeat).

The reasons for using platforms based on sharing economy concepts are different for tourist transport services and for accommodation services. With regard to the former, the most frequently indicated ones were as follows: a lower price (nearly 40% of indications), easier and faster access (34%) and greater

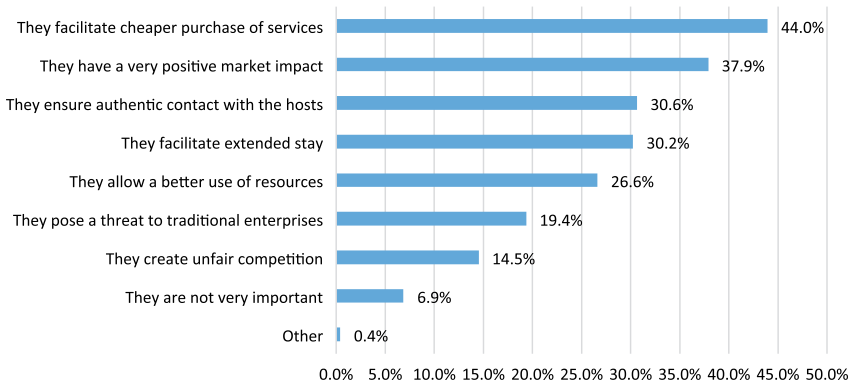
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<sup>1</sup> The survey was carried out in collaboration with D. Borysowa, a student at the Warsaw School of Tourism and Hospitality Management (SGTiR).

<sup>2</sup> The dominating share of young people among users of sharing-economy platforms is also indicated in other surveys (The Sharing Economy 2015).

comfort (31%). Determinants such as the possibility to meet new people and experiencing authentic contact are much less important (11% of indications). As regards accommodation services, the respondents mainly appreciated a wider range of listings (28% of indications), a favourable price-quality ratio (26%) or simply a lower price (22%). The possibility of using a private room/place, meeting new people or experiencing more authentic and real contact are much less important but still play a role (a total of ca. 37% of indications).

**Figure 1. Role of sharing economy platforms in the tourism market as assessed by those surveyed (% of indications).**



Note: The percentages do not add up to 100% since the respondents could indicate more than 1 answer.

Source: own study.

When asked about the role of the platforms concerned in the tourism market, those surveyed primarily indicated their positive market impact from the consumer’s point of view (cheaper purchase of services, competition benefits, the possibility to extend one’s stay thanks to lower prices). In addition, the respondents appreciated the possibility to establish authentic contact with the hosts (31% of indications) and better use of resources (ca. 27% of indications). It is worth emphasising that access to cheaper services and better use of resources were more frequently indicated by older persons, whereas younger respondents valued authentic contact more. Every fifth respondent saw a threat to traditional tourism enterprises and 14.5% of those surveyed indicated unfair competition. Studies carried out by PricewaterhouseCoopers LLP also suggest that the respondents see the risk of sharing economy platforms’ ‘evading’ legal regulations; as many as 59% make confidence in them conditional on their compliance with relevant legal provisions, whereas 72% perceive the idea of exchange through online portals as inconsistent (*The Sharing Economy* 2015).

An analysis of opinions and assessments of those surveyed clearly shows differences in the perception of individual business models, indicating to what



extent consumers believe declarations of the enterprises covered with regard to their implementation of sharing economy concepts. A comparison of BlaBlaCar and Uber indicates that the former is appreciated for the possibility to establish direct contact with the driver and the price which, as assumed, should not significantly exceed the travel costs shared by the passengers. As regards Uber, users value highly its typically commercial aspects: ease of access, the form of payment, the form of booking services. In both cases, trust and safety were rated low, slightly lower among women and, additionally, deteriorating with the respondents' age. A threat to safety also concerns online payments and inspires the creation of new solutions to secure transactions via the Internet (Schneider et al. 2016).

**Table 1. Ratings of selected aspects of the provision of tourism services by Airbnb and Couchsurfing (0 to 10)**

Service characteristics	Airbnb	Couchsurfing
Ease of access, fast contact and service booking	7.78	7.41
Manner of registration	7.88	8.23
Additional services (breakfast, guided tours in the area, etc.)	6.47	7.32
Furnishings of the flat/facility	6.92	7.68
Cleanliness	7.3	7.09
Service provision reliability	7.65	7.68
The hosts' honesty (e.g. consistency of services offered and actually provided)	8.02	8.59
Service price	7.59	8.26
Trust in the host	7.19	7.68
Authentic contact with the host	7.75	7.85
Safety	7.98	7.76
Possibility to have direct contact with the host	7.79	8.0
Other characteristics	6.89	7.23

Source: own survey carried out in collaboration with D. Borysowa.

Furthermore, the comparison of accommodation platforms (Table 1) shows that the respondents see more of the sharing idea in Couchsurfing than Airbnb, as reflected in higher ratings of possible direct and authentic contact with the host and consistency of services offered and actually provided as well as the possibility to use additional services such as breakfast or guided tours in the area. With regard to Airbnb, higher ratings concerned typically commercial aspects of services: ease of access, fast contact and service booking, cleanliness and safety. Research has confirmed that trust, convenience and authenticity are the most appreciated characteristics stimulating the development of undertakings based on the sharing economy concepts.

## New research areas

In conclusion, it is worth pointing out that the phenomenon of the sharing economy and collaborative consumption, growing very fast not only in tourism, opens a wide and still methodologically unstructured field of study, also encouraging interdisciplinary empirical surveys. Since the business models based on the sharing economy are at an early stage of development, there are no conclusive studies or analyses allowing to assess their impact on the development of the tourism industry. Both in Poland and in other countries, the basis should be to identify the size of the phenomenon, in terms of scope, composition, direction and rate of changes. It is worth indicating three main research areas: (1) relationships between changes in consumer behaviour with regard to the hierarchy of needs, their level, means and ways of satisfying them and the development of various forms of collaborative consumption. Such changes are mostly initiated by young generations, revealing not only differentiated, frequently impermanent, consumer needs and behaviour but also demonstrating various forms of responsibility for sustainable development, including conscious limitation of consumption, an increased need for experiences and their authenticity. This limitation is reflected in both deconsumption and making an efficient use of available resources based on the sharing economy concept; (2) influence of the new business models using the idea of sharing and collaboration on the tourism market, its structure, the manner of operation of existing economic entities (usually small and micro-enterprises) and competitiveness conditions; it is worth undertaking studies seeking to answer the questions whether and how traditional tourism businesses see a threat posed by such new business models, whether it is treated as important, how it is responded to and what measures are taken to transform it into an opportunity to boost own economic activities; (3) impact on the socio-economic environment (employment, the multiplier effect on local development) as well as on the institutional and legal environment; the phenomenon of the new solutions based on the sharing economy ideas 'evading' mandatory legal regulations in the tourism sector. An important question arises whether economic operators are able to use the ethos of sharing and convert the currently increasing threat into an opportunity for the future and how they can apply the new concepts to their existing business strategies.

## Conclusions

The phenomena of sharing, loans for use, exchange are no novelty in the history of market behaviour. Not only do they enable to use services cheaper than those offered within traditional business models, they also lead to more authentic contact with hosts, building relations and easier travelling. The

difference between the current and previous behaviour is the scale of the phenomenon, still increasing and stimulated by the potential of the latest information technology. The existence of similar phenomena in the world history shows that they tend to wither over time and to be used temporarily, in particular at times of economic downturn. The sharing economy in its current form faces a number of unresolved problems, including legislation issues, and local conflicts arising from the non-acceptance of the new competitiveness conditions in the market by traditional tourism enterprises.

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## Ekonomia współdzielenia na rynku turystycznym: możliwości i zagrożenia

### Streszczenie

Celem rozważań jest ocena istniejących badań dotyczących ekonomii współdzielenia w turystyce oraz próba interdyscyplinarnego przedstawienia rozmiarów i specyficznej charakterystyki tego zjawiska na rynku turystycznym. Analizie poddano główne czynniki warunkujące ideę ekonomii współdzielenia w turystyce, zakres akceptacji konsumenckiej, ocenę tego zjawiska, a także wskazano na nieuniknione konsekwencje zmieniających się potrzeb nie tylko na rynku usług, ale i rynku pracy. Czerpiąc z wyników poprzednich badań, skupiono się na metodach konkurencyjności stosowanych przez przedsiębiorstwa, wykorzystywaniu kreatywności i innowacyjności w turystyce oraz sposobach wykorzystywania przewagi cenowej (w tym cięcia kosztów biurokracji i pośredników). Rozważania na temat obecnej sytuacji na rynku turystycznym wskazują również na działania podejmowane w celu ochrony obecnych konkurencyjnych pozycji tradycyjnych firm turystycznych. W pracy porównano też niektóre aspekty rozwoju tego zjawiska w Polsce i na Ukrainie.

**Słowa kluczowe:** turystyka, konkurencyjność na rynku turystycznym, ekonomia współdzielenia, wspólna konsumpcja.

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