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A Critical Perspective on the Sharing Economy in Tourism Using Examples of the Accommodation Sector in Austria

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Introduction

This chapter focuses on the area of tourism in Austria, specifically in the short-term accommodation sector. In Austria, tourism has an important status. With 89.3 million overnight stays by non-residents in 2018, Austria ranks fifth compared to other European countries in terms of absolute overnight stays (Eurostat 2020). In recent years, digital platforms have gained increasing importance in the rental accommodation sector and have changed consumption patterns in other realms of daily life too (e.g., food delivery services). Today platforms serve as providers or

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mediators for sharing different sets of (in)tangible resources. As a result of digitalisation, the rise of the platform economy has changed modes of economic production and consumption in society (Kenney and Zysman 2016; van Dijck et al. 2018). And as in many other countries, there have been debates on how to regulate this upcoming sector (Kirchner and Schüßler 2020). Especially in cities, so-called 'platform urbanism' has significantly altered the production of space since platform activities have changed the relationship between people and their urban spatial environment (Graham 2020). Despite numerous efforts in Austria, attempts to counteract the changes associated with the sharing economy regulatorily have so far been unsuccessful.

In addition to structural changes, the tourism sector has been hit heavily by COVID-19, the consequences of which are not yet foreseeable. However, it is obvious that there will be fundamental changes because a decline in the total number of overnight stays can already be observed. Overall, the number of overnight stays in Austria fell by 36% in 2020 compared to the previous year. This corresponds to a decline of 98 million in overnight stays. Compared to other provinces, the federal capital Vienna was hit hardest by this decrease, overnight stays dropping by 74%. In December 2020, there was a 94% drop in overnight stays in Austria. The country's well-known winter tourism has thus been severely affected by the pandemic in the 2020/2021 season (Statistik Austria 2021).

Starting with a description of various business and governance models within the sharing economy and a characterisation of the tourism market in Austria, this chapter will focus on alternatives within the sharing economy and describe possibilities for individual and (mainstream) state-regulatory action. In this chapter, references to terms or reports on the so-called collaborative economy are to be understood as part of the sharing economy since uniform terminologies have not been established (Botsman and Rogers 2010; Krok 2019), and conceptual explorations are not part of this chapter. It takes a closer look at the consequences and opportunities of the development of market-based sharing platforms by juxtaposing two cases in terms of their business models within peer-to-peer accommodation as an economic mode between platform capitalism and platform cooperatives. By presenting examples of 'non-economic

fields', which fulfil basic structures of (commons-based) sharing, the chapter introduces various forms of collaborative consumption within the sharing economy, including platforms as facilitators and mediators for enabling civic participation.

Sharing Economy Business Models: Between Market-Based Services and Platform Cooperatives

Within the sharing economy, there are different business and usage models. Petropoulos (2017) structures the models into the following three groups: (1) P2P/C2C peer-to-peer/customer-to-customer: a platform (online/offline) through which a private person trades with another person or creates services for the latter (e.g., Airbnb, Blablacar); (2) B2C business-to-customer: trading activities or service provision between companies and customers (private individuals); and (3) B2B business-to-business: used to trade between companies or create services. Most authors developed these models in relation to digital technologies—unlike, for example, analogue exchange or 'swapping' circles (Hamari et al. 2016). The success of these models lies in the platform being perceived as an engine of trust. With the help of reputation and evaluation systems, platforms disguise the fact that things are being 'shared' among 'strangers' (Schor 2014). What is primarily shared on platforms is rarely an actual resource or good, but instead access to the platform, which mediates the services being shared. The good (e.g., housing space, cars, or food) is mediated by means of commission fees and thus further commodified as immaterial value for the operator (e.g., Airbnb). Regardless of whether platforms are for-profit or not-for-profit, Pentzien (2019) names three principles of operation. Firstly, they generate value by coordinating interactions and transactions between two or more actors. Secondly, they integrate supply and demand and shape the relationships between these actors. This gives them the power to exclusively determine rules and governance mechanisms. And thirdly, they generate data by acting as information brokers between the actors. This data is analysed

and sold as a commodity itself. This creates competition between the platforms in the data market (Pentzien 2019).

Today's sharing economy operates within the contested field between the commodification and the commoning of social capital 'such as "trust" in the form of peer ratings and reviews' (Thompson 2015, cited in Dobusch 2019, p. 114), which is situated in networks mediated through platforms. Dobusch (2019) distinguishes between digital platforms that are commons-based and market-based. The essential difference is the respective resource pool and exchange process. While commons-based platforms generally make material resources available without imposing remunerated conditions of reciprocal exchange on their users, market-based platforms, on the other hand, make use of a data-driven pool of resources linked to reciprocal monetary exchange.

In the case of market-based platforms, the business model relies on the extraction of data. These platforms integrate supply and demand. Unlike data mining on social media platforms, where micro-targeting is used for advertising, short-term rental (STR) platforms such as Airbnb, recommendation algorithms wield power over providers on the platforms (Dobusch 2019). In terms of neoliberal logics of the generation of capital, the model is therefore based on the constant collection of data (Srnicsek 2017; Pentzien 2019; Grabher and König 2020). With the collection of data and its processing (datafication), competitive advantages in new areas are opened up. Revenue is generated by outsourcing personnel and infrastructure costs, workers' rights, and the costs of the operational business. Markets are monopolised and made inaccessible for other players, as is best exemplified by the business models of Uber and Airbnb (Heiland 2018; Srnicsek 2017). These developments have led to sharing (economies) with commons-based platforms to pursue different strategies. Often summarised under the buzzword of 'platform cooperativism' (Scholz 2016), these models differ from the classical market-based sharing economy in their governance structure and the participation possibilities for their users. These platforms aim to counteract 'extractive capitalism' by returning surpluses to local economic cycles and local communities, as opposed to the business models of Airbnb and Uber, which exploit local resources as a global competitive advantage (Foramitti et al. 2020).

In summary, the platform acts as a mediator. A resource is made available, owned by one party but shared with others. Thus, the platform generates a higher value for the provided resource. The advent of digital technologies has led to an increase in exchange practices, so platforms today also need to establish a 'set of formal and informal rules' to ensure that collaborative usage can indeed be guaranteed (Dobusch 2019, p. 110). For the sharing economy and its actors, these areas are legal grey zones. Political actors often lack the means for regulatory intervention.

The Austrian Sharing Economy

Austria generated about €536 million in revenue from sharing economy activities in 2016 (Naumanen et al. 2018). This corresponds to about 0.15% of the national gross domestic product (GDP). Austria's economic performance in the sharing economy is thus slightly below the average EU GDP of 0.17%. The largest revenues are generated in the financial sector (€248 million) and the accommodation sector (€236 million), followed by the sector of online skills (€27 million) and transport (€24 million) (Naumanen et al. 2018). Looking at the respective sectors according to their underlying business models, the accommodation sector is characterised by international platforms offering services for short-term rentals (STRs)—usually, fully furnished apartments or rooms, rented on a daily/weekly basis. Especially in popular tourist destinations, the emergence of Airbnb has increased rents on the local housing market (Naumanen et al. 2018).

Within the EU, the internationalisation of platforms is most evident in Austria. In total, 221 platforms identified in the study by Naumanen et al. (2018), 39 are active in Austria, about half of which (19) are international (calculations by the chapters' authors based on data provided in aforesaid study). With the exception of the financial sector, international platforms predominate. To illustrate this, in 2016, there were no domestic platforms, and the accommodation sector was instead dominated by six international players, such as Airbnb and Booking.com, to name the two largest (Naumanen et al. 2018). In terms of the total

number of people (19%) who have ever made use of service via an online platform, Austria is below the EU average of 23%. However, in relation to total platform activity (EU average = 57%, EC 2018: 1; online fact-sheet Austria), almost two-thirds of Austrian users have availed of accommodation service. As for persons who have provided service via a platform, Austria is among the EU average of 6% (EC 2018, pp. 8, 63).

Austrian Tourism Sector and the Rise of Airbnb

The tourism sector in Austria is of great significance, both economically and culturally. In 2018 the tourism sector generated 6.5% of the Austrian GDP. In the Organisation for Economic Co-operation and Development comparison, this is above average (OECD 2021). In terms of turnover, the accommodation sector generated the highest financial share of 48% (Fritz et al. 2020, p. 18). In the 2018 winter season, 1.13 million beds were available as accommodation in Austria. Since the year 2000, this number has increased by 3.1%. Significantly above-average growth was recorded in this period for beds in private accommodations (+574%) and commercial vacation apartments (+2730%). Experts believe that this increase, especially in the capital city of Vienna, can be traced back to the global trend of collaborative consumption, driven by C2C-platforms such as Airbnb (Fritz et al. 2020, p. 1). In 2018, Airbnb reported that 1.1 million guests booked accommodation in Austria via their service. It is estimated that in Austria, 30,000 hosts are providing private short-term accommodation via digital platforms (Kurier 2019).

In the accommodation sector, which relies on tourism, Airbnb has taken on the role of a digital frontrunner for services mediated via platforms. In 2017 alone, Airbnb made a profit of \$93 million out of \$2.56 billion in revenues, reaching \$4.81 billion by 2019, only to drop by 50% in 2020. Travel restrictions due to the pandemic resulted in just 150 million bookings worldwide (Airbnb 2020). In Vienna, about half of the offers (49.8%) in 2019 were made by hosts with multiple listings, which indicates commercially organised STRs (Inside Airbnb 2019). An empirical study for Salzburg (Smigiel et al. 2019, p. 161) indicates

that accommodation offered via Airbnb is to a large degree facilitated by professionalised providers (e.g., commercial hosts with multiple listings approximately 55%). Furthermore, very few people actually 'share' their own apartment. According to a quick search on the market minder platform AirDNA the type of accommodation that is actually 'shared' (shared room) is higher in the capital, with a quarter of all listed offers than in the much smaller cities of Salzburg (15%), Graz (17%), Innsbruck (18%), and Linz (19%). One possible explanation could be the higher demand for housing in larger cities. According to conservative estimates by Smigiel et al. (2019, p. 163), Airbnb is depriving Salzburg's housing market of around 50% of its overall stock in the long term. In Vienna, Seidl et al. (2017), who used the same methodology as Smigiel et al. (2019), found an effective deprivation of 38% through the same type of accommodation. Both studies used a mixed-methods approach in which all Airbnb offers were quantitatively surveyed and analysed on two cut-off dates in June 2017 and June 2018. Subsequently, guided in-depth interviews were conducted with 10% (Salzburg) of the Airbnb providers according to provider structure (Smigiel et al. 2019, p. 156). The method proved successful and was later also used in a similar fashion for the Thessaloniki case study in Greece (Katsinas 2021).

The commercialisation of platforms will become more widespread in the future and move away from the former practice of 'sharing' by expanding the original offer with complementary services. Such developments can already be observed with Airbnb integrating city tours, photo tours, food tours in hip restaurants, and the like in their offers (O'Regan and Choe 2017). The world market leader Airbnb is expanding into new business areas in order to become an all-around travel provider on a global scale (Behrendt et al. 2017). However, Airbnb also struggled with the effects of the COVID-19 pandemic. Expecting revenues of only \$2.4 billion in 2020 (half of the previous year's sales of \$4.8 billion), the company announced that it would lay off 1900 employees. This represents a quarter of the total workforce at Airbnb (Grieß 2020). Contrary to expectations, Airbnb joined the public stock market in December 2020. Two months later, in February 2021, Airbnb presented its quarterly figures from the previous year with the surprising result that instead of a 50% drop in revenue, it only made a 30% loss (FAZ 2021).

This is explained by the pandemic-related geographical reorientation of customers towards more remote regions. Media research (Glusac 2020; Griefß 2020; Twickel 2020) on tourism during the pandemic and official numbers on overnight stays in 2020 (Statistik Austria 2021) reveal how vulnerable supposedly stable industries such as Austrian tourism can be, especially when they have been impacted by neoliberal exploitation mechanisms, where players like Airbnb are very quick to adapt to unstable markets in times of crisis.

In the year 2020, overnight stays in Vienna were 74% down from 2019. This equals a decline of around 13 million in absolute numbers. The year before the COVID-19 crisis, overnight stays and sales in Austria reached all-time highs (Statistik Austria 2021). At the time of writing, COVID-19 infection rates in Austria and Europe are still high. Therefore, it is hardly realistic to expect a return to an 'old normal' in tourism. It can be assumed that the crisis will lead to bankruptcies and a restructuring of the tourism industry, which in Austria is strongly characterised by the winter season and ski tourism. These are both areas of tourism where adaptation to climate change will be necessary and global warming poses major long-term challenges. In 2020 the Austrian Federal Government established financial support funds to deal with the COVID-19 crisis, with companies in the tourism sector receiving financial support (Martins et al. 2020).

Overall, and despite previous regulatory efforts by the authorities, it is not foreseeable at this time how the crisis will affect the STR market industry. It can be assumed, however, that STRs could benefit from the situation, and already prevailing platforms could further expand their market dominance. Recent media reports indicate that Airbnb and similar platforms could emerge as winners from the current crisis: especially in times of physical distancing where people tend to look for remote locations, independent units, and are more flexible by working remotely. Despite temporary setbacks and city tourism dwindling, Airbnb will adapt its business model to include close to home destinations ('staycations') and enable holidays outside the major city regions (Glusac 2020; Twickel 2020).

The case of STRs in general and Airbnb, in particular, has so far involved many regulators and caused municipalities to react in various

ways without resulting in any standardised regulation on a national or international level. For this reason, Austria introduced the recording obligation for platforms in 2020. Since the beginning of the year 2021, information must be made available by the platforms to the responsible tax authorities (BMLRT 2019a).

In 2018 the development of a new strategy for Austria as a tourism destination was started but had not been completed. In interim reports, it is emphasised that digitalisation poses an enormous challenge for the industry. Blockchain, artificial intelligence, and similar technologies are seen as ground-breaking for future developments (BMLRT 2019b). As demonstrated above, it can be assumed that the Austrian tourism industry will face changes, which bear challenges but also opportunities. At present, the state-run Corona Aid Fund is intervening strongly in markets, attempting to mitigate the negative consequences of the pandemic. It would therefore be the right time to support local, regional, or fair alternatives in the field of digital STRs and to support the development of commons-based platform cooperatives. The *Commons Manifesto* by Michel Bauwens et al. (2019) can serve as a guideline on how to better initiate such development processes and as a good working basis for practice at the local level. It is necessary to draw attention to new and more sustainable concepts in tourism. The following section draws attention to two different platform models providing alternative structures of peer-to-peer accommodation.

Interest in Hybrid Sharing Models in the Austrian Accommodation Sector

Due to restrictions on travel and contact, traditional accommodation services are available to a limited extent. Demand has fallen sharply as a result of the pandemic. The situation illustrates that platform-based services require reorganisation in order to remain viable even in times of crisis. The following two examples show how local actors in the field of platform economy are contributing to a critical discourse on alternative futures alongside global players of techno-capitalist platformisation such as Airbnb (Graham 2020). The two Austrian examples from

the accommodation sector given below illustrate alternative possibilities for entering a niche market alongside players such as Airbnb and Booking.com. Although both examples can be summarised as for-profit models, their offers are different from those of players such as Airbnb. Reposée and Schau auf's Land illustrate how current challenges can be tackled by innovation in the segments of slow tourism, rural regions, and food consumption in combination with touristic accommodation.

Reposée

The Viennese start-up Reposée has created a niche market for 'seasonal sharing,' says Felix Woldt, its co-founder (Tourismuspresse 2018). The platform allows users to book holiday flats as well as weekend homes that are easy to reach and can be rented regularly over a long period of time. The Austrian platform was established in 2017, received financial support from the federal government and rents out properties that are empty over a long period of time during the year. On their website, accommodation is provided to users within a radius of maximum 300 km from their permanent residence, so they can travel there regularly over the weekend or even during the week (Sharing Economy Wien 2021). Proprietors remain flexible and save high initial investments in their own (second) homes. One of the aims of the project is to counteract the seasonal vacancy in tourism communities. In contrast to STRs, long-term rental and swapping models make it easier to book an apartment even in difficult times, as their business models do not require frequent rentals. In addition, individual usage and exchange models can (informally) be agreed upon between the hosts and the guests. Assuming that the business model is intended to work on a long-term basis and is not based primarily on algorithm-driven rating systems, stronger bonds between consumers and providers can also be expected, making the latter less dependent on short-term guests.

Schau auf's Land

This platform is aimed at a specific target group (e.g., 'Eco Camping' labelled) within the agri-tourism and eco-tourism sector (Röser 2020). The main objective is to bring together caravan and motorhome travellers with agricultural businesses in rural regions, such as farms and wineries that market directly. The concept is not new—the idea comes from French wineries and is now present in many European countries with similar platforms. At present, about 150 farms are listed on the Austrian platform. Travellers can stay 'free of charge' (paying an annual fee of €35) on one of the farms, providing agriculturalists with the opportunity to extend their sources of income through direct marketing (Derbrutkasten 2020). Even though traditional segments of the accommodation sector, such as the hotel industry, suffered financial losses due to drastically falling numbers of overnight stays (Statistik Austria 2021) caused by the COVID-19 restrictions (Martins et al. 2020), it remains unclear whether a concept such as Schau auf's Land is viable because no jobs are attached to it. Furthermore, it remains unclear whether a tourism levy in the form of a visitor's tax is paid to the respective municipality for each overnight stay. During a pandemic, an overnight stay with Schau auf's Land is a good alternative and further empirical research on the example Schau auf's Land is currently in planning.

What can be observed is the necessity but also an opportunity for a change in tourism. Austria has the potential to focus more on factors such as regionality, authenticity, and deceleration, which can be subsumed as 'slow tourism' to advocate rural regeneration, as Alison Caffyn (2012) puts it. In this chapter, the examples of Reposée and Schau auf's Land illustrated how hybrid platform models could become established alternatives in the field of touristic accommodation. Another alternative to fill gaps in hospitality infrastructure is creating networks of peer-to-peer accommodations in order to balance 'substantial growth in tourism demand while having serious shortages in tourism accommodation' (Knežević Cvelbar and Dolnicar 2017, p. 98). Even if they currently play a minor role in terms of competitiveness and overall market performance, they can nevertheless take on a pioneering role of alternative

approaches within platform economies and peer-to-peer network relations. Enterprises like *Reposée* and *Schau auf's Land* should continue to be supported by the public sector in terms of funding schemes in their start-up periods. The two examples illustrate opportunities within the regimes of market-based sharing and may be able to occupy niches in places with less competition than in large city regions such as Vienna.

Also, in urban contexts, more and more initiatives (e.g., Fairbnb) have appeared alongside the global players in the STR industry and counteract well-known upshots such as the gradual subtraction of residential housing and gentrification (Foramitti et al. 2020; Katsinas 2021). At the local level, there are now a number of initiatives as alternatives to market-based sharing. The goal of these initiatives is to provide paths for urban commoning via city-owned platform cooperatives and 'produser'-owned platforms (neologism composed of the term producer and user), which are engaged in collaborative cycles and circular economies (Scholz 2016). In the accommodation sector, no such examples exist in Austria.

Summary

In the past, areas such as the sharing economy and other dynamic economic sectors created by digitalisation have often initiated processes of change in a pioneering way in society—with both positive and negative consequences. Terms such as sharing or collaboration must be brought into a new discourse since they have long been undermined by the capitalist logic of extraction by the majority of (market-based) platforms, differing from the initial idea of non-commodified sharing. The promise of a post-capitalist alternative to neoliberalism, originally attributed to the new sharing economy, dissipated when the business logic of the majority of digital platforms surfaced, and the expected revival of community and network effects did not lead to a transformation in the current economic growth paradigm (Grabher and König 2020).

Concluding, it can be said that STRs play an important role in the Austrian tourism sector. Looking at the number of domestic STR platforms, it should be emphasised that a main source of revenue in Austria

is increasingly at risk of being undermined by global players such as Airbnb. In order to prevent the popular Austrian hospitality sector from slowly (and literally) being ‘rented’ out to international companies and no longer being ‘shared’ with its global tourists, the national authorities should—especially in times of crisis—provide additional support to cooperative platforms and models similar to Resposée and Schau auf’s Land within market-based economies. Such efforts must be coordinated within the EU. Stefan Kirchner and Elke Schüßler (2020) emphasise the importance of understanding the underlying organisational structures for a functioning regulation of the field. Regarding possible regulatory interventions, they emphasise the role of various actors from the public sector, private actors, civil society associations, and unions (Kirchner and Schüßler 2020). Only then can a transition to a new, more sustainable tourism based on supply structures of digital platforms be gradually put on a more resilient path.

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