



City Tourism Trends and the Sharing Economy in Europe

Opportunities and Challenges

Karl Wöber



Outline

- Recent trends for European city tourism
 - WTCF Expert Committee members: Roger Carter, Nancy Cockerell, Karl Wöber
- Sharing Economy in Europe
 - Opportunities and challenges
 - The Vienna case



TourMIS 1984-2016 – www.tourmis.info

- Platform for members of tourism associations to **share** data, information, and knowledge



- Provides free and easy access to tourism statistics
- A social media application (~ Wiki)
- 230 tourism experts enter data for 74 countries & 150 cities
- >22,000 registered users

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General Information

European Countries

Cities

- ▶ Latest trends
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Austria

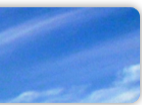
My TourMIS

Data entry

Logout

**28 cities
sharing
monthly data
Jan-Jun 2016**

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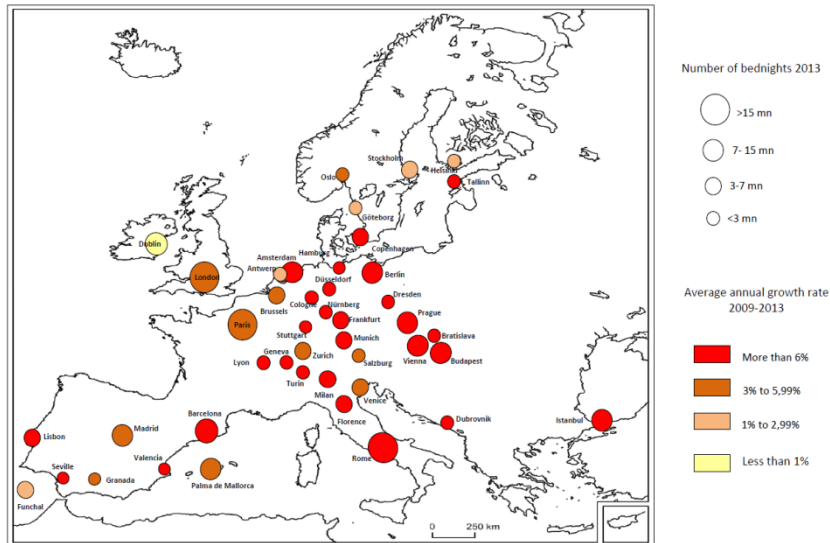
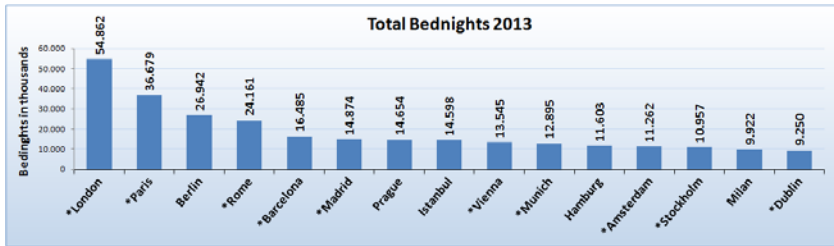
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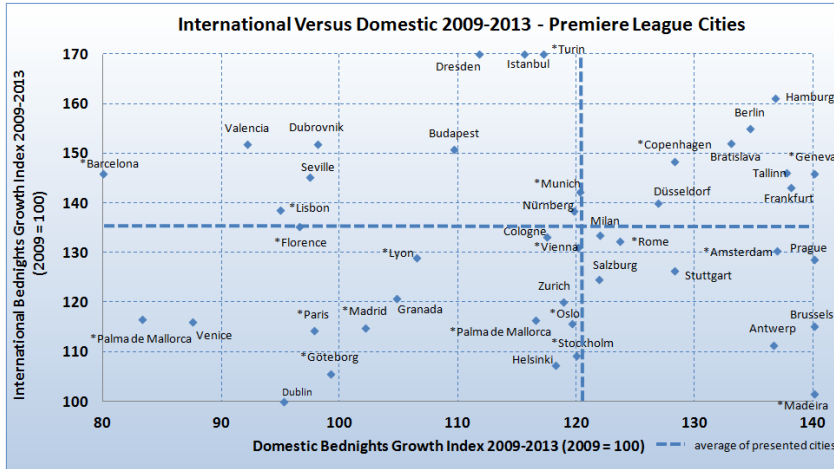
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TourMIS Tools

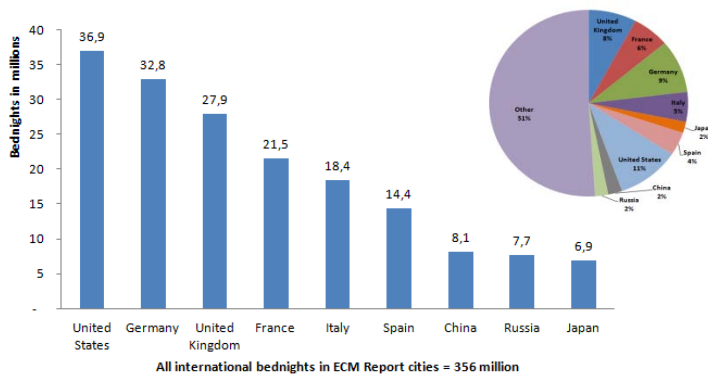


- Market volume and market share analysis
- Measuring and benchmarking seasonality
- Identifying guest mix problems of destinations
- Forecasting tourism demand

TourMIS Tools



- Comparing visitor surveys
- Measuring and benchmarking demand of tourism attractions
- Analysis of the performance of DMO websites





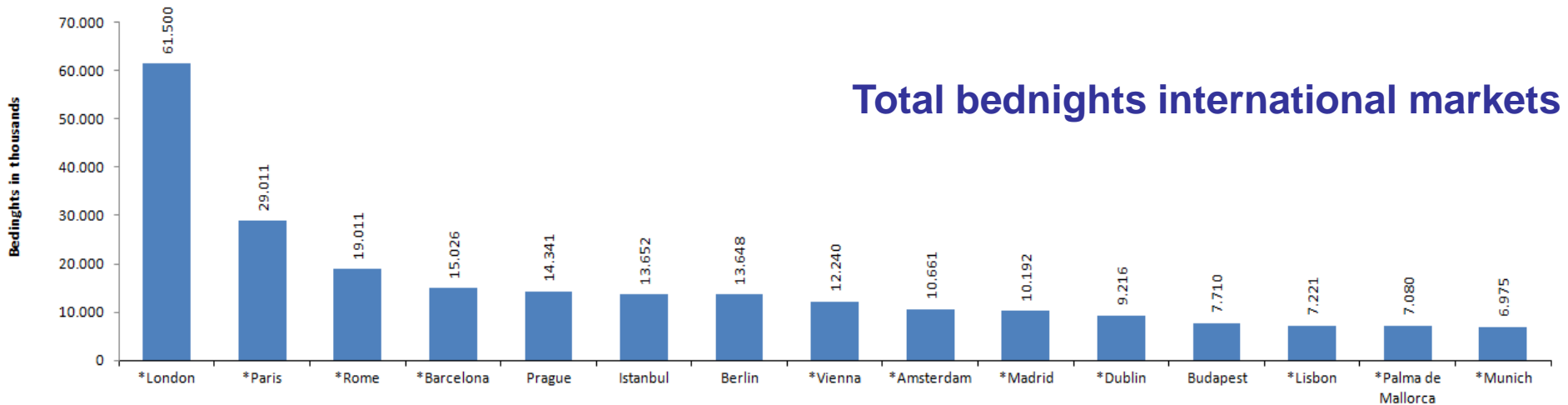
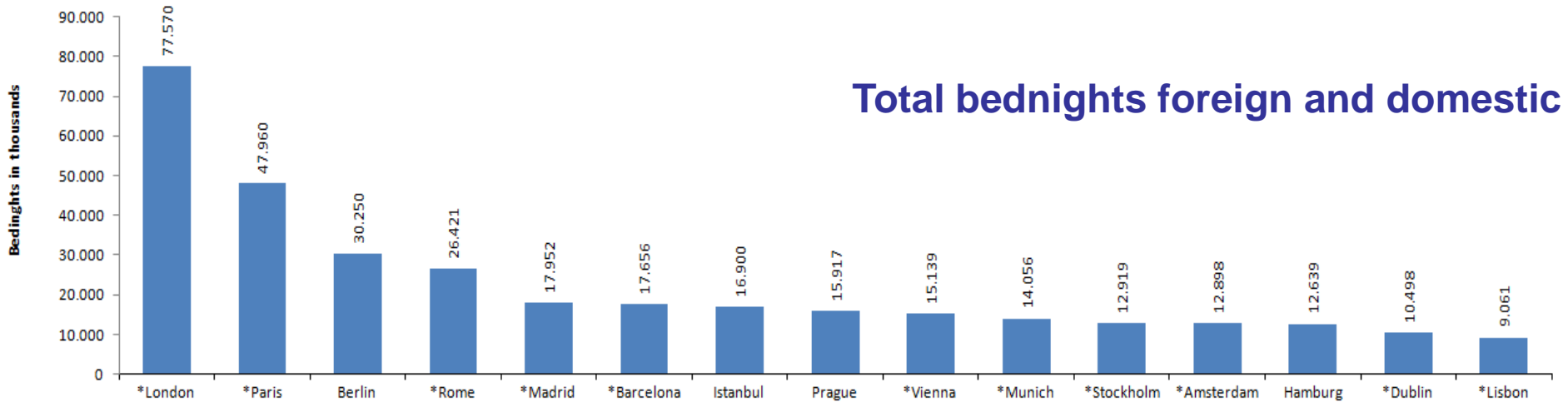
European Cities' Marketing BENCHMARKING REPORT 2015-2016

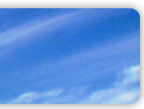
12th Official Edition
Market Trends 2011-2016
Featuring 121 Cities





Europe's Top 15 Cities





Cities vs National Tourism

121 ECM Cities	2015	2014-15
Total bednights	561 mn	+5.5 %
International bednights	356 mn	+5.8 %

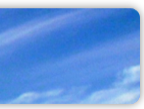
2011 - 2015	EU 28	121 ECM Cities	World *
Total bednights	+ 10 %	+ 16 %	+ 47%
International bednights	+ 17 %	+ 21 %	

Source: ECM; * IPK



Why Is City Tourism Gaining Importance?

- Increase in urbanization
- Greater global mobility; information boom and increased knowledge-sharing
- City tourism products are highly standardized and readily available for purchase
- Cities are ideal for short-breaks
- Cities have become more attractive (cultural, clean, modern, smart)
- MICE and shopping - important travel motivations



Threats to City Tourism

Economical

- The increasing standardization and transparency of products and services leads to greater competition and lower profit margins

Environmental

- Crowding, congestion, waiting time, emissions, and pollution distracts visitors to cities

Social

- Relationship between tourists (tourism industry) and citizens (community)



The Sharing Economy

- Transportation
 - Car-pool, car-lending, car parking at private home
- Accommodation
 - Sub-letting in a private home, couchsurfing
- Hospitality
 - Share a meal, social reviews of restaurants
- Suppliers of guides and tours
 - Locals as tour guides, online guidebooks



Pros and Cons of the , Sharing Economy '

FACTORS	REGULATED tourism businesses	UNREGULATED sharing companies
Price	The price of regulated products covers all overhead costs including licensing and permits.	The prices of unregulated products are typically lower than regulated products as compliance costs are not a factor.
Authenticity	Hotel rooms, taxis, and other tourism products provide a consistent approach, e.g. a hotel room in London and Sydney may operate and even feel the same.	Consumers believe they are “living” in a similar way to a local resident and therefore believe they are experiencing greater authenticity.
Environmental	Regulated businesses usually consume greater amounts as products are purchased primarily for the consumer. This also includes the physical buildings where businesses operate.	Sharing companies allow people to use their existing resources in a higher capacity.
Communication	There are established systems in place for response, complaints and queries. Consumers expect that the supplier will offer a quick-immediate response as risk of business loss would be higher.	Communication with the consumer is dependent on when the supplier has time and their willingness to respond. No real damage is incurred to the supplier from lack of response.



Pros and Cons of the , Sharing Economy '

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Reliability	Booking systems are sophisticated and highly accurate. Where bookings are taken incorrectly, alternatives can in most cases be offered to the consumer.	The booking system relies on the supplier regularly updating their status. The consumer may not be adequately compensated when the booking is taken incorrectly due to the detached relationship between the supplier and the sharing company.
Transparency	Businesses are generally required to identify their address, costs, detail their product and provide photographic or other evidence of the quality.	The potential for false listings is significantly higher. There is great ease in operating under a false guise, or provide a product that does not exist or is vastly different to how it is advertised.
Health and Safety	Businesses require all the necessary licenses, permits and safety equipment to operate, guaranteeing the health and safety of consumers.	There are no guarantee for the product. Consumers are subject to risk and essentially responsible for their own personal safety and belongings.
Quality	A minimum standard of quality is guaranteed through compliance with regulations. Reviews, which often include expert reviews, also provide indication of the quality of a product.	The quality of the product is unknown and cannot be guaranteed. Peer reviews can be provided, however these reviews are generally controlled by the sharing companies and therefore can be moderated.

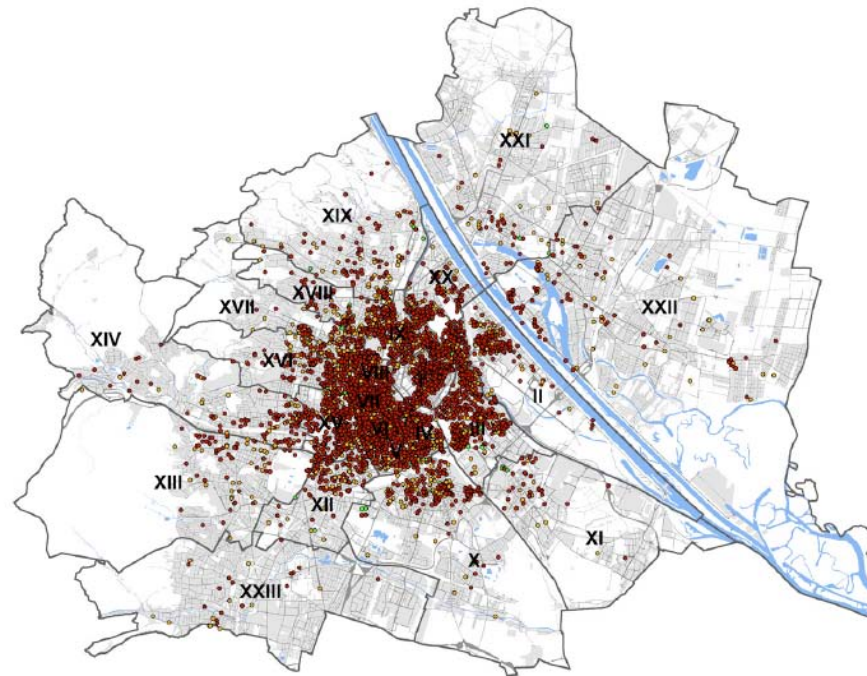


The Sharing Economy in Vienna

TURNING THE SHARING ECONOMY
INTO A FAIR ECONOMY IN VIENNA

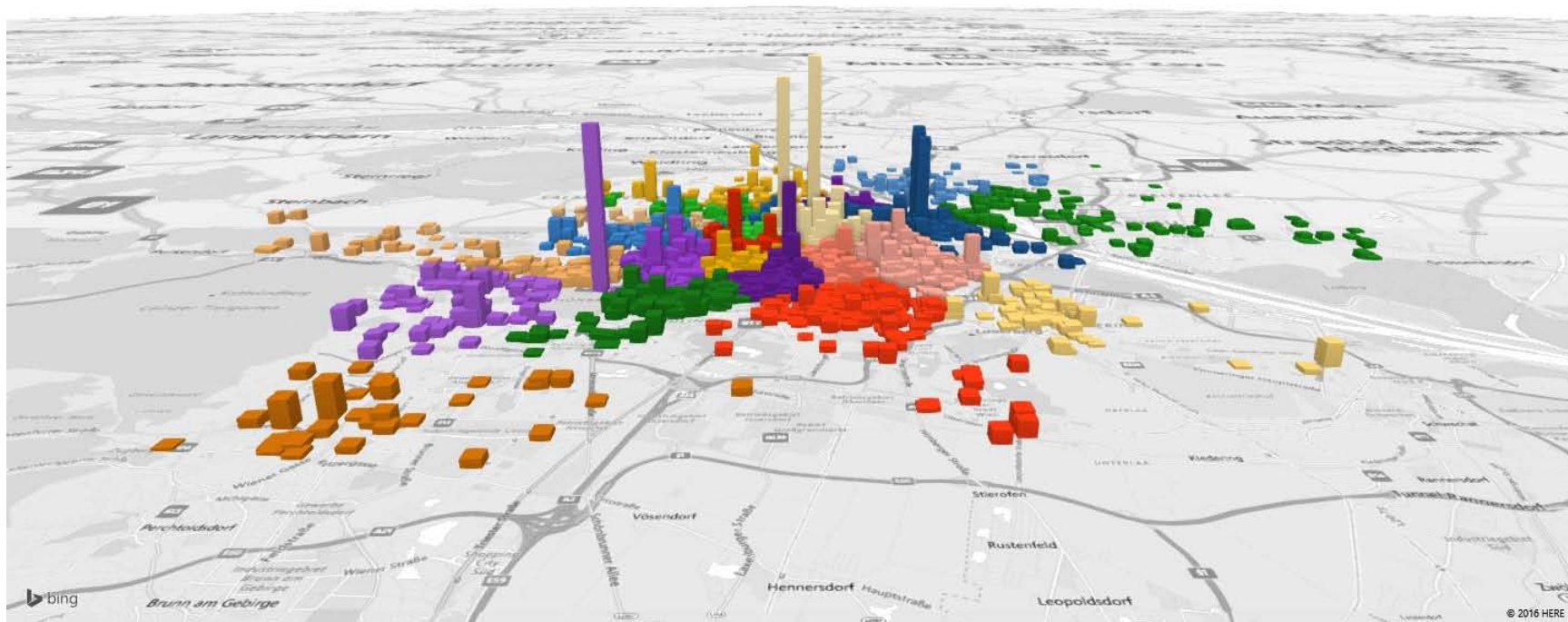


StadT Wien





The Sharing Economy in Vienna: Geographical variety in ADRs





The Sharing Economy: The Vienna Strategy

1. Vienna welcomes innovation and new ideas if they contribute to solving problems and are in line with the needs of society
2. Vienna commits to fair competition and the principle of “good jobs”
3. Regulations have to be complied with, and therefore, efficient enforcement has to be ensured
4. There must be no business at the expense of the general public
5. Communication and information activities are intensified on the regulations to be observed



Outlook

- Response by the European Union
- City tourism will lead the way in supranational tourism policy
- Sharing economy is growing and will challenge cities to adapt to new forms of tourist behavior
 - Governments will try to apply regulations
 - Regulations are not the only way to keep tourism businesses competitive



Thank you!

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