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Data source

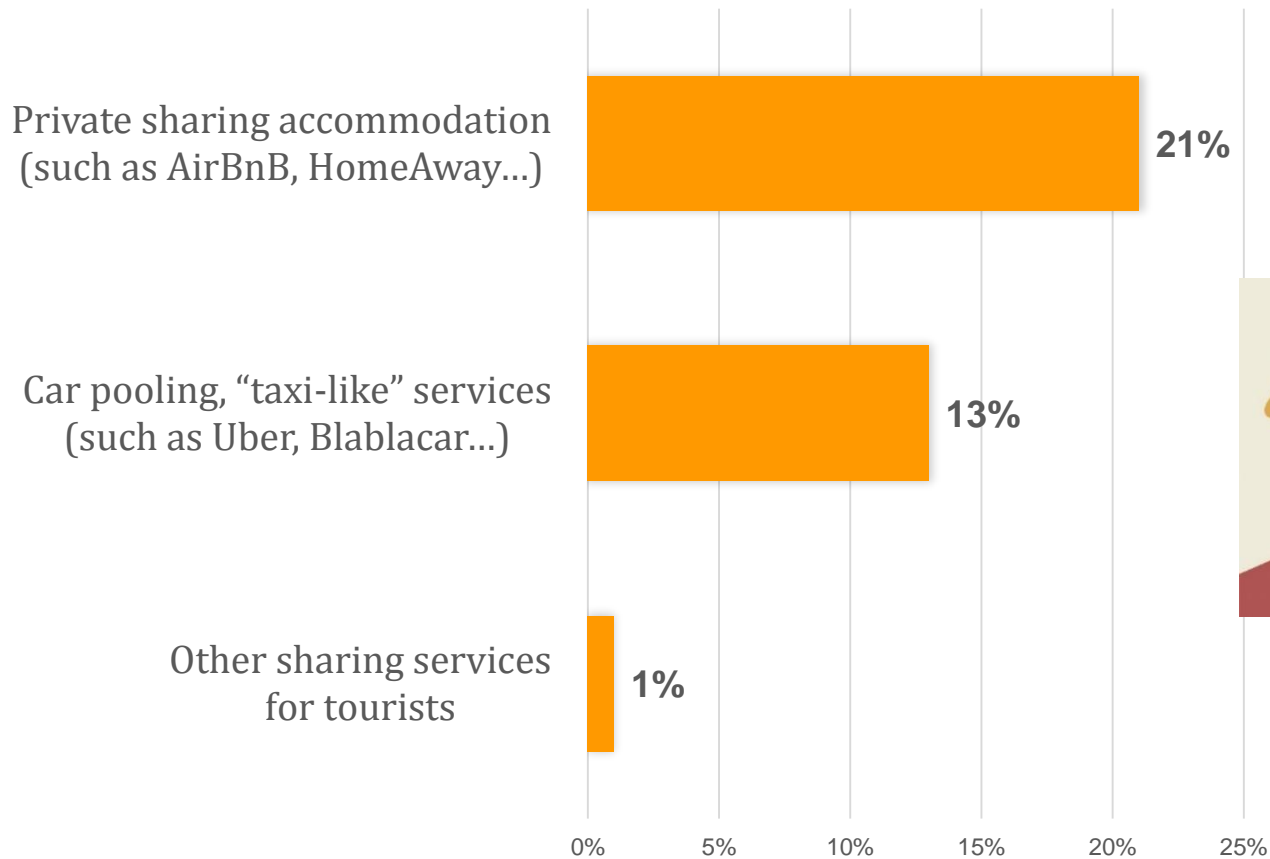
TRAVELSAT[®] is the UNWTO-awarded reference **global competitive research platform** for destinations. It provides public and private players of the **visitor economy** with insights combining **representative surveys** with controlled **Big Data** targeted analysis covering the **whole travel experience from inspiration to sharing**.

- **What share of visitors** do they represent ?
- What is their **profile** Vs average ?
- Does sharing really **improve experience** ?
- Does sharing impact **destination competitiveness** ?

The following report is based on a custom data analysis benchmarking results from travel collaborative platform users (900+ interviews) Vs average visitors (10.000+ interviews) staying in the same set of European cities in 2015.

Not a niche anymore !

Usage of sharing economy services during the stay (%)



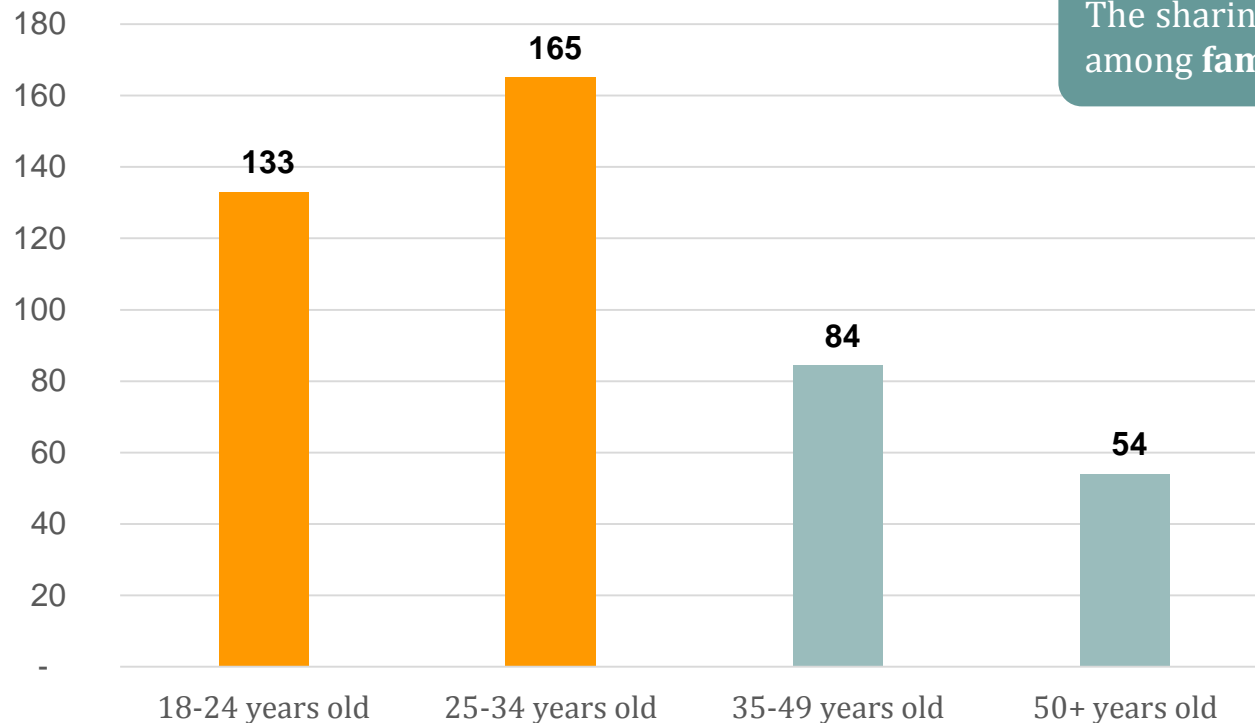
Nearly 1 of 3 tourists have used at least one sharing service during their stay...



Millennials as early adopters



Sharing Services Usage Index - Variations per age

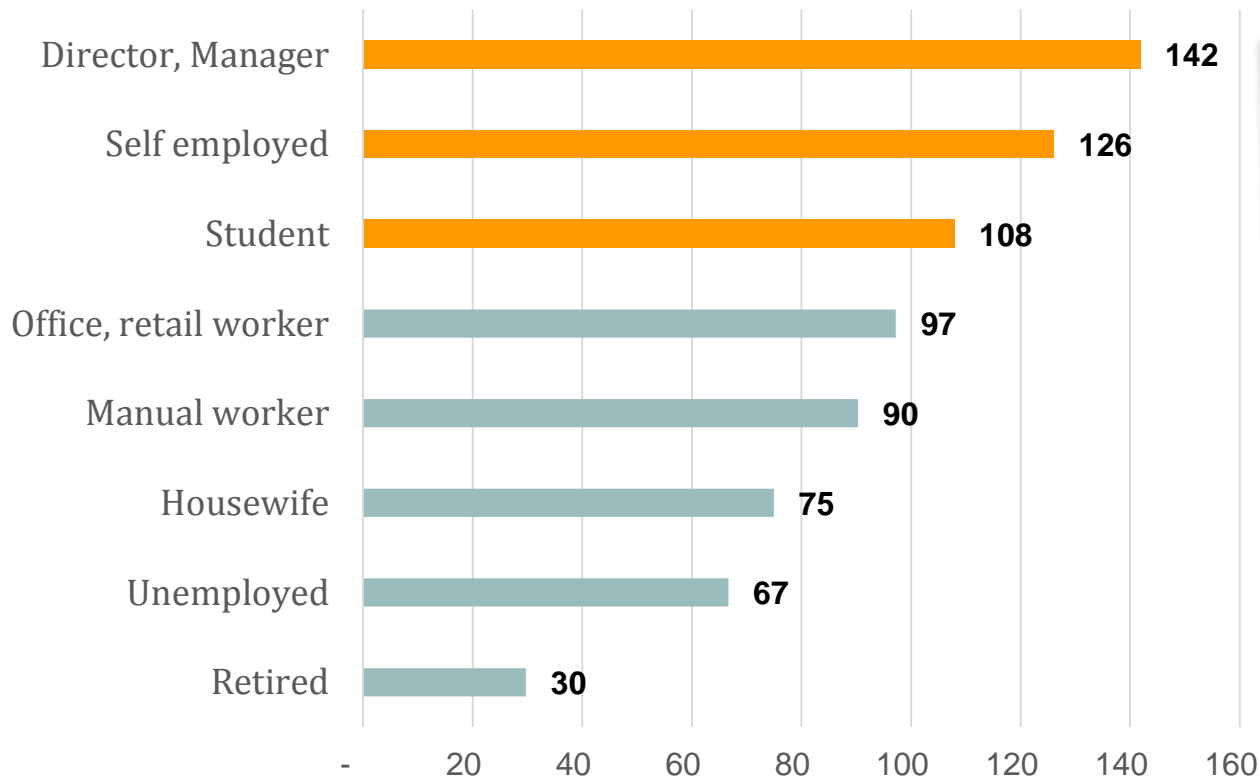


The sharing usage is also higher among **families** (*index 116*)

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High social classes... but not exclusively

Sharing Services Usage Index – Variations per occupation level



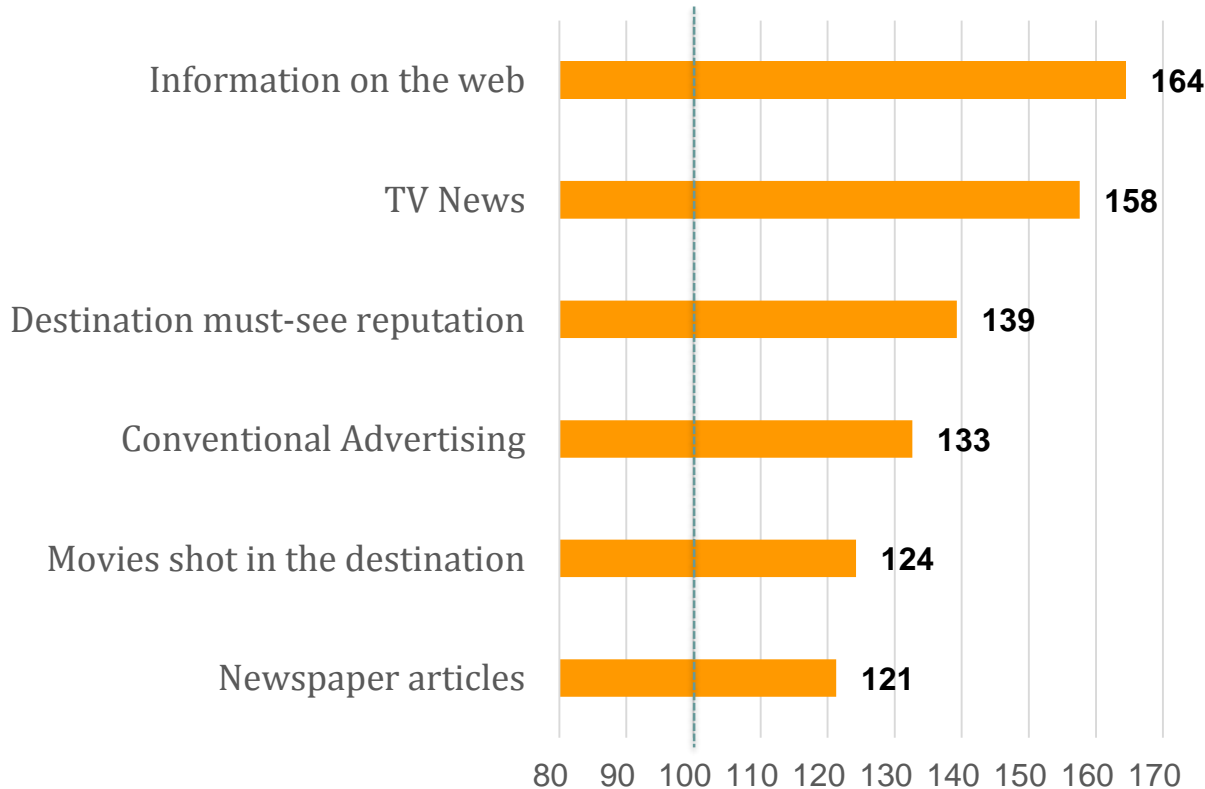
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Inspired by multimedia channels

What mostly prompt destination choices of sharing services' users

(average visitors index = 100)



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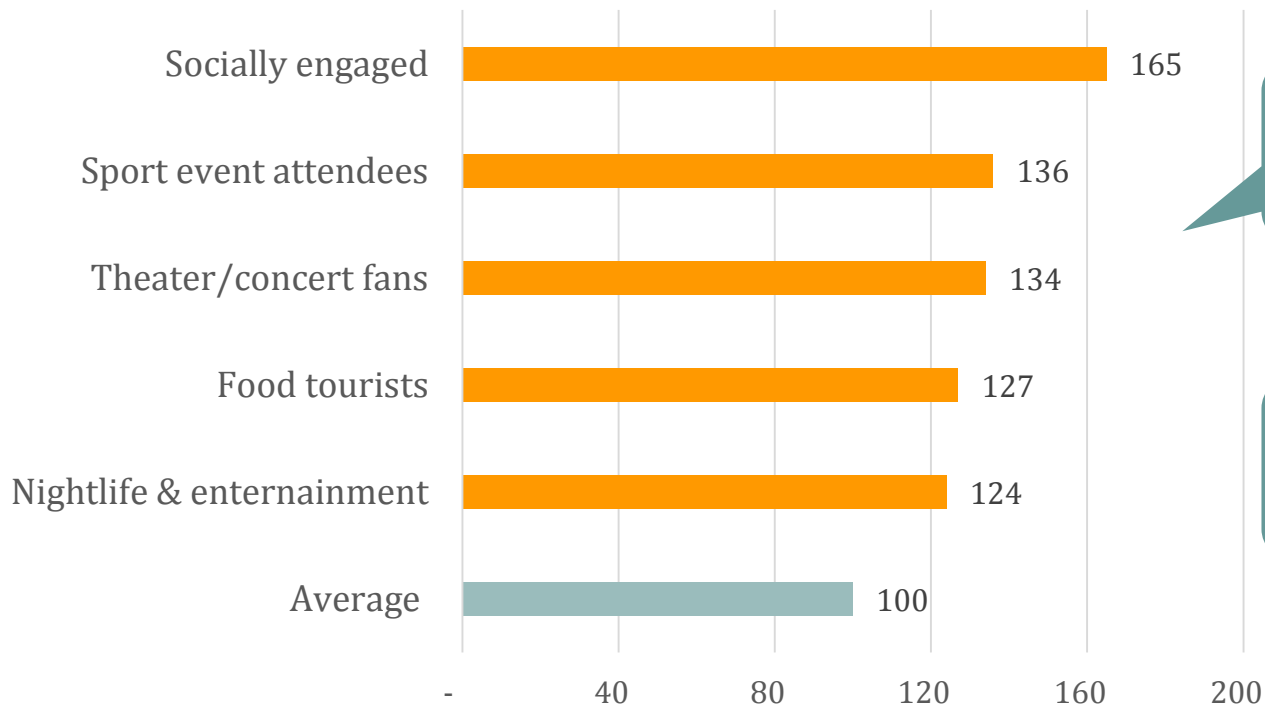
Going digital is key
but not enough !



Exploring the destination



Sharing Services Usage Index – High Affinity Segments



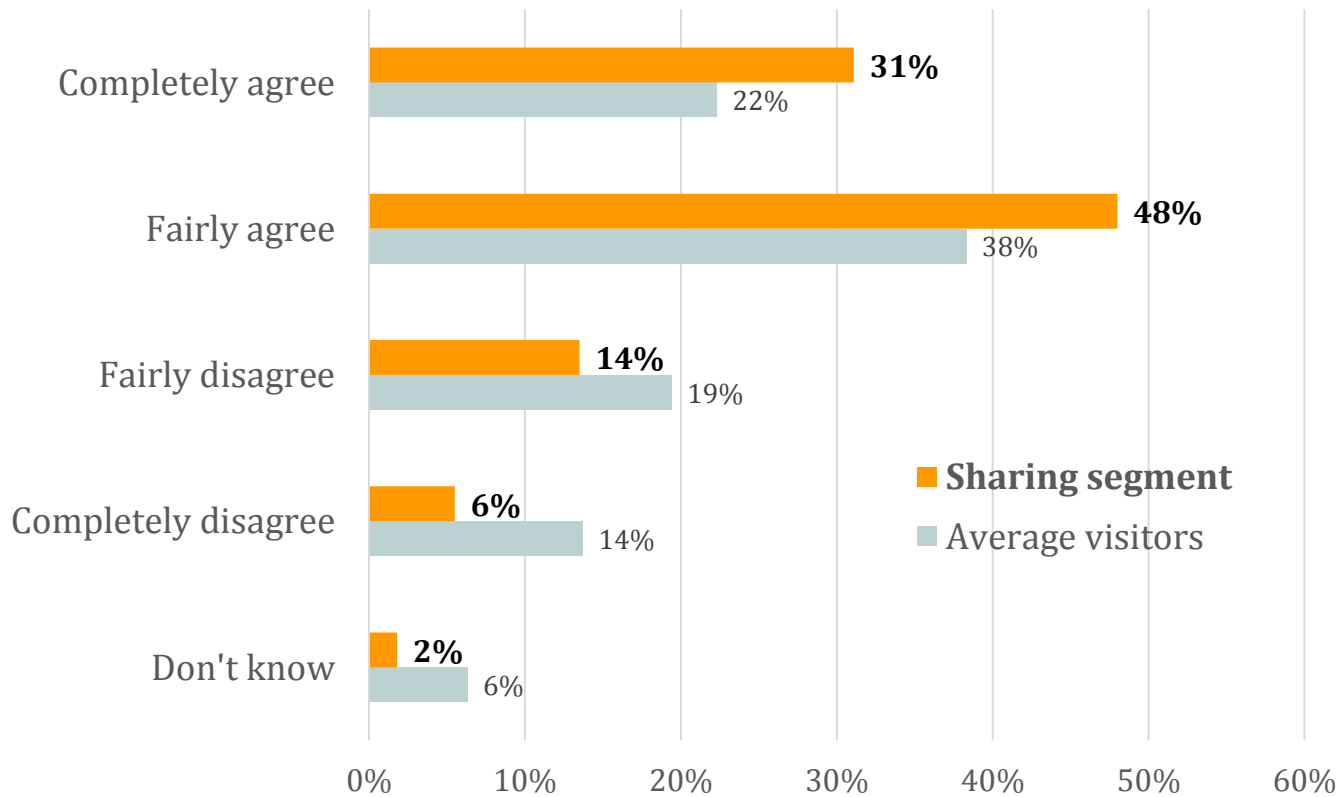
A stronger than average engagement in enjoying all day & night destination facets

They are also 35% more than average mentioning *shopping* as their main purpose of visit...

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Inspiring others

"I like sharing about my travel experiences on Internet, even with people I may not know"



3 of 10 collaborative platforms users are active web influencers !

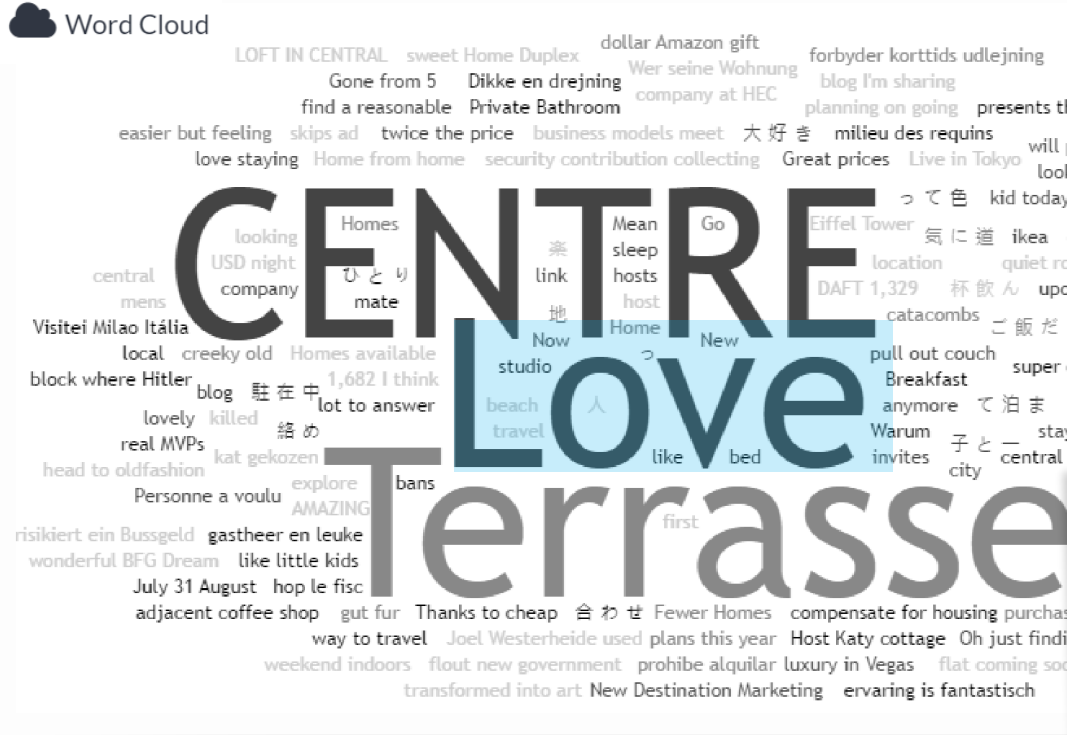
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It's about travelling and love ! (not only money)



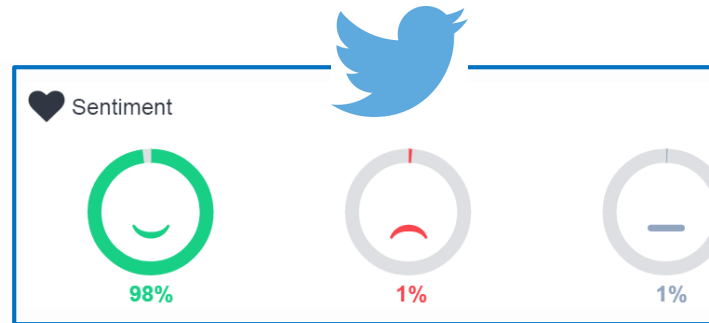
TRAVELS@T Pulse
Web Social Media
Conversations Report

Snapshot of most frequent words and # associated with Airbnb in European cities in week 18 – 2016



TRAVELS@T PULSE / VIZR MAY 2016 - All markets, all cities

It's about **positive sentiment** ! (not only money)



Mankool Athens
@Mankool_Athens

Morning #latte in #Athens at the local #bakery. When I travel, I love staying in #airbnb because it's cheaper (who...
<https://t.co/zvVy8Mq4qD>



il y a 3 jours



Kelsey Fieret
@kelseyfieret

I love @Airbnb! Eerste ervaring is fantastisch. Mooi huis, lieve gastheer en leuke stad. Wat wil een mens nog meer #dublin #airbnb



il y a 4 jours



Stylish Rentals
@StylishRentals

Love this! "Appartement Terrasse PARIS CENTRE - Apartments for Rent in Paris" @airbnb #Travel



Nick Pellant
@nickpellant

.@ffoxphoto and I just enjoyed a delicious and very chatty breakfast with our lovely @Airbnb hosts. Now off to explore London!



il y a 3 jours

Positive ●

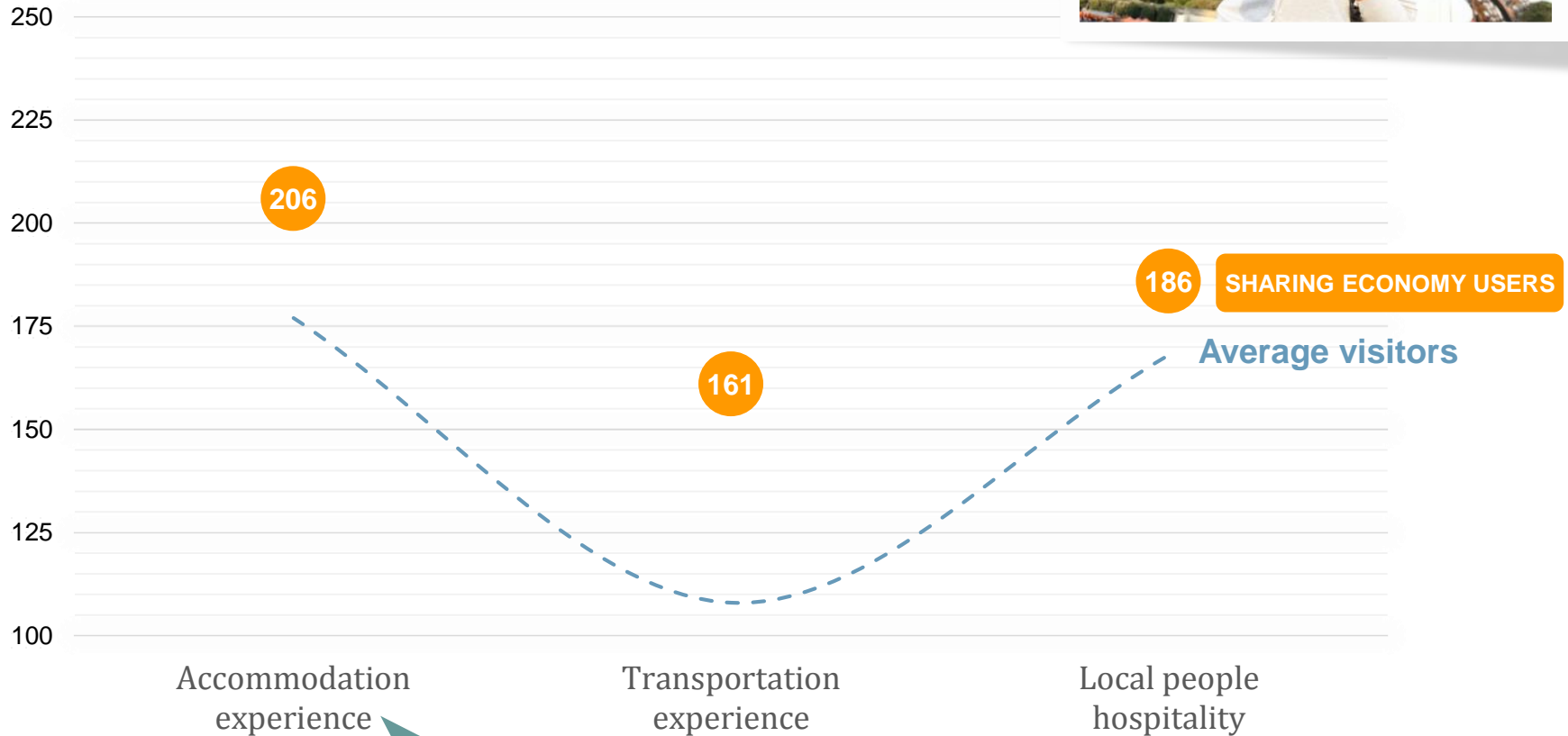
Positive ●

Enjoying the destination ...



A positive impact on visitor experience

Satisfaction Index – Gap Analysis



... BUT also 30% more complaints reported Vs average, reflecting a lack of consistency in the quality provided...

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Impact on destination competitiveness...



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So yes... dare to share !



5 TAKE-AWAYS FOR SHARING...

1. **CTOs caught in the crossfire** : the new consumer agenda does not fit the political agenda
2. The travel 'uberisation' is anchored for a long time. **Being 'for' or 'against' it is not the right question to ask anymore.**
3. **Segmentation opportunities** for destinations for engaging with viral, highly socialized, brand-sensitive destination explorers who are not only "money-savers" anymore !
4. "Sharing" **positively impacts visitor experience** on the visitor journey facets it touches...
5. ... AND positively **influences cities' competitiveness** too from consumers' viewpoint.