

Title: How Inclusive Is P2P Accommodation in Jamaica?

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Abstract:

Technological innovations are fast transforming the accommodation sector especially in the way destinations facilitate tourism, develop products, gather data, access markets, and attract visitors. This disruption has ripple effects across the tourism industry and affects how low-income groups could leverage tourism to improve their livelihood. One of the prominent disruptors is the digital platforms that facilitate peer-to-peer accommodation. The P2P accommodation economy is composed of people who provide accommodation directly to consumers using digital platforms. P2P accommodation may contribute to making the benefits of tourism more inclusive by dispersing tourism over a wider geographic area, providing entrepreneurship opportunities for women and others with a need to supplement their income. This study analyzes the impact of P2P accommodation on the tourism sector of Jamaica and its ability to support inclusive growth. This is the first study researching the impact of P2P accommodation in a Caribbean destination. The study uses a mixed-method approach using national arrival statistics and detailed data obtained from Airbnb on bookings between 2014 and 2017. The quantitative data set is combined with host focus groups and in-depth interviews with hosts and other stakeholders.

Results showed that Airbnb guests accounted for 2.4% of all international arrivals in in Jamaica in 2017 and thus represent a small share of the overall tourism market in the country. The study showed that P2P bookings follow a different geographical pattern than hotels and resorts; this is especially the case for homestays and not so much for vacation rentals. P2P accommodation also provides opportunities for women who represent more than 50% of the hosts. However, the study also showed that those providers with the highest occupancy levels are professionals with well-maintained properties in more desirable neighborhoods. Lack of an attractive property is the main barrier to access for marginalized groups. Guests prefer to stay in secured apartment buildings and gated communities owing to safety concerns. Relatively few providers are very successful, while others have difficulty attracting guests. P2P accommodation has the potential to be inclusive but the type of destination plays an important role in the ability to drive inclusive growth. In resort destinations, a large share of the P2P accommodation inventory consists of traditional vacation rentals often owned by foreigners. In destinations where security is an issue, the ability to benefit from P2P accommodation is limited for those who do not have access to a desirable and safe type of accommodation. The digital platforms are providing access to the market, but barriers remain, as to participate a host needs a desirable

accommodation for rental, digital access, digital skills and an understanding of the guests' needs and wants.

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