STUDY

Techno-disruptions and travel

Examining the impact of platformisation in the Indian tourism sector

IT for Change

TOURISM WATCH

Brot für die Welt

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Content

Preface

Digital travel and booking platforms are challenging and changing the global tourism industry with far-reaching impacts for the entire value chain. The tourism industry adopts digital tools and online activities at a higher pace than most other industries. This is particularly the case in India, a rapidly platformising tourism market. However, it is also true for a 'traditional' sending market, such as Germany. In 2019, online bookings accounted for 43 percent of the total turnover of leisure and business trips by German travellers. As more and more traditional tour operators digitalise their operations and new start-ups in tech and tourism mushroom, the market power of online players in tourism is poised to grow all over the word.

IT for Change, Brot für die Welt and its special desk, Tourism Watch, strive to reduce inequalities and promote global justice. In the context of tourism, one of the main questions today is whether online platforms foster economic inclusion and empowerment or further marginalise local tourism businesses. We aim to answer this question by taking a closer look at India – a nation at the forefront of digital development, with tech-savvy travellers and a vibrant domestic platform economy. This study sheds light on digital business models and the role of micro-, small- and medium-sized businesses in platformised value chains as they form the backbone of local tourism – both in the formal and informal economy.

In theory, the integration of local tourism businesses into digital booking platforms could democratise and balance (global) economic power structures by making large and powerful intermediaries, like international tour operators and incoming agencies, obsolete and allow for a more direct interaction between guests and hosts. In reality, booking platforms themselves act as new kinds of gatekeepers. They determine the rules of access through opaque algorithms and impose price models that are out-competing small, often family-run, businesses on uneven terms. The findings of this study from India as well as research from other Asian and African countries show that the ability to participate proactively and to benefit from platformisation requires more than just access to technology and needs a healthy data and network advantage for small players.

If tourism is to contribute to sustainable development as constituted in the 2030 Agenda on Sustainable Development, it needs to expand social and economic benefits for the local population and must reduce its negative impacts on environment and societies. However, current trends of platformisation in tourism do not hold up to this vision. Policy frameworks, as well as business conduct and travel behaviour must change urgently. Otherwise, the digital transformation of tourism will continue to polarise – favouring financially strong booking platforms and dominant online travel agencies and relegating the majority of people in local destinations to a merely subordinate role.

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Summary

Platform giants have emerged as game changers for the tourism industry in India, whether domestic players like MakeMyTrip and OYO Rooms or international companies such as Airbnb and TripAdvisor. They have given rise to new forms of data-based optimisation and personalisation, whether in ticketing, accommodation and tour experiences or in the more hidden, business-to-business layers.

But not all small tourism businesses are well-placed to benefit from this development. In fact, the divide between dominant digital players and small local enterprises widens. Those who are not able to use platforms to their advantage fall out of global value chains. This threatens their livelihood and raises questions of global justice.

On the one hand, these shifts have significantly boosted aspirations to travel and afforded new conveniences and choices to the end consumer. On the other hand, these disruptions have resulted in highly uneven outcomes for various actors placed within the value chain. This study throws light on the complex terrain of platformisation in the tourism industry in India.

Highlights

- Backed by venture capital (VC) and possessing a large network-data advantage, dominant travel platforms have consolidated their hold over the sector and today exercise considerable leverage over the wider ecosystem. Platform practices, including deep discounting and the algorithmic manipulating of listing visibility, have significantly impacted the economic livelihood of smaller actors, who have reported a direct loss in autonomy, revenues and market visibility on account of platform activity. Yet, platformisation presents a Hobson's choice for these actors,

Today, tourists can research and book almost all tourism services online via platforms and their apps – from tickets to tents and tours.

who find themselves growing increasingly dependent on platforms for business.

- The communicative networks of platforms (rating and rankings, reviews and virality, i.e. high visibility through widespread sharing on social media) play a considerable role in determining touristic and economic success as well as mediate the gains and losses for actors. Older, well-established sectors with a high number of competitors, like hotels and tour companies, face an uphill struggle to be able to harness an advantage within these networks. Emergent sectors, such as homestays and hostels as well as micro-entrepreneurs and freelancers, are better placed to capitalise on communicative network power.

- In modularising, fine-tuning and enhancing the consumptive experience of touristic sites through data-based tactics, platforms both draw from and contribute to the "bucket list" mentality of the millennial consumer. The millenial traveller can today be segmented, analysed and targeted with products and services with a perspicacity that was hitherto unavailable. As local actors become forced to homogenise their operations as executors in the last mile, entrepreneurial autonomy within the local context risks being hollowed out in the long term.

- Platforms fragment the value chain, dislocating local networks of trust and disincentivising local collaboration. This is likely to result in a zero-sum situation as marginal players forced to rely on platform mediated arrangements lose local traction, even as the platform entrenches itself in the local value chain.

- A critical connection between platform-led overtourism and ecological impacts becomes apparent, which constitutes a core concern for sustainable tourism policies in the country. This is countered by the emergence of a noteworthy, albeit small, trend towards alternatives that seek to reclaim the locally responsible tourism experience.

- Policy responses lag behind in addressing the challenges caused by emerging digital tourism stakeholders. Pre-existing guidelines for tourism development as well as existing sectoral laws governing commercial activity are in need of an overhaul to be able to effectively regulate platform-based activity in tourism.

Platformisation, much like in other sectors of the economy, calls for strong and effective regulatory responses in tourism as well. Policy must keep in check the inequitable outcomes spurred on by the activities of large platforms and also work to foster the local economy, promote sustainable tourism and encourage better data-led innovation in the industry.

Key recommendations

For governments
a. Enhance the capacities of the local, regional and national administration to use data-enabled tourism management.
b. Further anti-competition policies to limit the power of platform monopolies.
c. Strengthen legal instruments regarding the accountability of businesses (including OTAs and platforms).
d. Increase the data literacy of micro, small and medium enterprises (MSMEs) through training and capacity building.
e. Support MSMEs through regulation.
f. Offer alternative platforms that provide market access to small players.
g. Ensure tourism is environmentally and socially responsible.

For platforms and online travel agents
a. Enshrine due diligence practices.
b. Design algorithms in a transparent way.
c. Cooperate with public bodies and provide available information to monitor tourism development.
d. Harness communicative power to inform and nudge tourists towards responsible tourism behaviour.

Chapter 1
Introduction

1.1 The age of Instagram tourism

The days of early globalisation and limited internet, when backpackers set off – a dog-eared copy of the Lonely Planet tucked away in their belongings – to find hidden treasures off the beaten path, seems wholly out of sync with our current times. Today, the travel hashtag is one of the most ardently followed spaces on Instagram. We live in a world where, minute by minute, tourists all over the globe post selfies in front of monuments and eye-catching vistas, capturing the "famous and most-visited" to the "hidden and off-beat" destinations, creating endless feeds of user-generated content. These days, Airbnb controls more properties than the largest hotel chains. Ratings and rankings on TripAdvisor determine tourists' travel decisions before they have even left their homes. Suffice to say, outside of clickbait listicles that extol "10 hidden gems in Southeast Asia", there are no secret treasures anymore.

"Insta-spots" appear on the tourism map overnight, leaving many destinations underprepared and overrun by the sudden influx of Instagram travellers. After serving as the shooting location for the movie "The Beach" in 2000, the once quiet Maya Bay on Ko Phi Phi turned into Thailand's most iconic beach and island attraction. Drawing an average of 5,000 visitors a day, Maya Bay became one of the most "instagrammed" beaches on social media over the decade. So much so that in 2018, the beach was shut down to visitors, bringing into effect a four-year ban to allow the island to recover from the ecological damage caused by excessive tourist traffic, much of which has been attributed to the trend of "Instagram tourism" (cf. Zsombor, 2019).

Other popular tourist destinations, including European cities such as Venice and Barcelona, and some summer hill destinations in India, have also turned to travel bans, visitor limits and tourism taxes to combat the problems of overtourism (cf. Milano et al., 2018; Batha, 2019). Local residents, city governments and other stakeholders have cited tourist traffic led by travel platforms as the cause of multiple issues, e.g. disruptions to everyday life, rising gentrification and rents, as well as the overcrowding of public spaces to name but a few. In the Global South, there has been a longer critique of the structural problems of mainstream tourism and the mid-to-long-term impact

For many millennial travellers, "instagrammability" is one of the most important factors when deciding on where to spend their holidays.

Box 1: The outlook for global travel

The growth of the online travel market corresponds with the significant role played by tourism, which as an industry accounted for 10.4 per cent of the global GDP in 2018 (cf. World Travel & Tourism Council, 2019). Despite being underemphasised in terms of policy, tourism activity has an indelible impact on economic development and job creation across the world. In many developing nations, where industrialisation has been limited, tourism has been pursued as a vital development strategy and is a primary driver of revenue.

The United Nations World Tourism Organisation (UNWTO) had forecasted that international tourism would increase to cover 1.4 billion border crossings by the year 2020, a threshold which was met two years ahead of schedule in 2018 (cf. UNWTO, 2018). This upswing in numbers has been bolstered in no small part by a promising outlook for the global online travel market – marked by the presence of top players such as Priceline, Expedia, TripAdvisor, Alibaba, Airbnb and Ctrip – poised to be worth $1,134.55 billion by 2023 and recording strong annual growth of 13.16 per cent between 2018 and 2023. In particular, the Asia-Pacific region, home to a fast-growing base of international travellers, shows the fastest growth potential at 15.9 per cent over the forecast period (cf. Market Research Future, 2019).

on the lived and natural habitats of communities, including, specifically, the resource appropriation locals often face in the name of tourism development (cf. Dasgupta et al., 2016). For instance, Bali's 2016 proposed land reclamation project, which planned to usher in more tourism in the ecologically sensitive Benoa Bay, was met with widespread protests (cf. Langenheim, 2016).

The World Bank (2018) notes that user-generated content (UGC) is, for travellers, the most important and widely used source of travel information. In the past, guide books such as the Lonely Planet served as critical spheres of influence for the elite who travelled for work or leisure. Today, travel as an aspiration coalesces around social media. Key nodes of influencers – millennials who have successfully monetised their travel experiences through various platforms – trigger a herd mentality among their followers. Online platforms like Instagram and TripAdvisor have become crucial in supporting decisions about travel-worthy destinations, changing the way consumers make travel choices, such as where and how to travel, where to stay, what to see and how to get around.

Further, industry research finds that 61 per cent of travellers download apps from travel platforms before trips and 87 per cent of millennials consider their smartphone to be their most critical travel essential (cf. PATA, 2018). Travellers not only rely on platforms to research, book and plan their trips, but also while they are away, e.g. to navigate their destination, find sights and attractions, and choose restaurants. What is more, current market research indicates that the prospects for online mediated travel seem to be booming overall (see Box 1).

1.2 Understanding the tourism platform ecosystem

Global platform giants in ticketing (Travelocity, Kayak), hotel accommodation and rentals (Booking, Airbnb, Ctrip), as well as tours and experiences (TripAdvisor, Viator) have emerged as game changers for the tourism sector, giving rise to a new industry ecosystem in tourism and travel driven by data-based optimisation and personalisation. Online Travel Agencies/Aggregators (or "OTAs" as they are known) are part of this mutating ecosystem, serving as critical multi-segment marketplaces that allow travellers to plan and design itineraries that match their interests and budgets. A range of Software as a Service (SaaS) platforms that work to provide intermediation and business-to-business layers, such as dynamic pricing algorithms (Danamic, recently acquired by OYO Rooms), channel management to optimise cross-platform presence (RateGain), booking mechanisms for inventory (Hotelogix), and sourcing and analytics support (Duetto, Beyond Pricing), form the backbone of these new platforms.

Travel platforms are bundling in more and more allied services and products – such as food and shopping – to

their offerings as a way of growing their customer base. As airlines become more competitive through direct sales channels for online ticketing, online travel platforms are working to seek new sources of revenue and consumer engagement. For instance, in April 2019, Traveloka, a major Southeast Asian platform, began to onboard spa services and partnered with a theatre chain to offer film tickets (cf. Hamdi, 2019). The company subsequently launched a credit card service in partnership with Visa and Bank Rakyat Indonesia (cf. Bin Daud, 2019). Similar niche finance products and services, such as insurance, travel loans, etc., are also now being offered via mainstream and alternative finance platforms (IndiaLends, Lending Tree).

On the one hand, the platformisation of the tourism industry has done much to elevate travel as a social aspiration, expanding choice for the average tourist through increased information, reduced costs, and the elimination of pain points (providing different services under the same roof, integrating functionalities). On the other hand, it has also shifted economic power towards new online business models – the recent bankruptcy of the Thomas Cook Group, one of the world's oldest holiday companies, being a case in point (cf. BBC, 2019). Previous research in the domain has demonstrated how travel platforms can turn geographies into consumption commodities through hyper-emphasis on visual and culturally essentialist marketing, invariably benefiting well established/financed businesses who are suitably poised to exploit these angles (cf. Bentley & Maharika, 2019). Platforms prop up certain tourist circuits that receive high capital flow at the real cost of expelling other places and spaces from tourism imaginaries altogether.

An important, albeit smaller, group of alternative players has also made a mark online, exploring the potential of "collaborative consumption" (cf. Botsman & Rogers, 2011) for sustainable and community oriented touristic practices (cf. Yannopoulou, 2013; ITB, 2014, as cited in Dredge & Gyimóthy, 2015). While a website like Global Free Loaders, which is still in operation, was an early example of connecting hosts and travellers, allowing the sharing of accommodation on non-monetary terms, the platform Couch Surfing – which has been running longer than Airbnb – is a take on the concept more akin to the network era. Indeed, the platform opportunity has also given rise to some unique social value propositions. The global hospitality exchange network Warm Showers, which operates in close to 175 countries, allows touring cyclists to connect with other cyclists residing en route who are willing to offer restroom facilities and accommodation during the journey. Premised again on non-monetary rewards, the network allows a global community with a shared interest to engage in their hobby in a sustainable, non-market framework (cf. Kramon, 2017). While trends in this direction are more visible in the Global North, alternative platforms built on ideas of responsibility, local development and respect for natural and historical heritage are still a fringe movement in the Global South.

The current global interest around platform governance presents an opportunity to examine the disruptive impact that online travel platforms have had, especially in Global South economies. This facet of tourism in developing countries remains rather understudied, with knowledge production in the sector largely served through commercial and market research.

Through an exploratory empirical study of the platformisation of tourism in India this research attempts to unpack and critically examine the development impacts of travel platforms. It sets out to address the following questions:

1. What is the state of play with respect to the domestic tourism platform ecosystem in India? What business models are currently operational? How do they fare with respect to global competitors?
2. How do tourism platforms shape economic relations and transform existing value chains and power structures among various actors? What new opportunities/barriers to economic participation arise for small and marginal actors?
3. What changes are needed to ensure development outcomes for local communities and micro, small and medium-sized enterprises (MSMEs) in the sector?

Chapter 2
Methodology

This study is an empirical exploration of the implications of platformisation for small operators and local actors associated with travel and tourism in India. The tourism market in India – a rapidly platformising sector – is analysed in order to find out what opportunities, risks and challenges smaller operators face. This study aims to contribute to the discussion on how platforminsation affects issues of inequalities and global justice in tourism.

The research adopted a methodological approach with three interrelated components.

a. Scanning of secondary literature regarding the domestic tourism platform ecosystem in India, including mainstream and alternative platforms and their footprint in the Indian tourism industry.

b. Interviews with different actors in the industry, including hoteliers (high-end, mid-range and heritage properties), hostel operators, homestay owners, local guides, tour operating companies (general and specialised), restaurant owners, business associations and groups, as well

as government representatives in state ministries of tourism in two Indian states. All service providers and business actors interviewed for this study reported either a prior or current listing on one or more travel platforms.

Two high-traffic tourist destinations in India were identified as sites of inquiry. The sites chosen were:

- **Jaipur** in the state of Rajasthan, a popular domestic and international tourist destination in India. Jaipur is part of the popular Golden Triangle tourism circuit comprising New Delhi, Agra and Jaipur, and enjoys high degrees of connectivity by road, air and rail. Jaipur is also prominently placed in other tourism circuits within the state of Rajasthan, which, as a region, receives a very high inflow of domestic and foreign tourists from all classes (low-end/backpacker to high-end luxury travellers), and thus has a very densely clustered tourism economy.

- **Manali,** situated in the ecologically fragile Indian Himalayan Region (IHR). Located in the north-western state of Himachal Pradesh, the town has historically been a backpacker destination for budget travellers from both the domestic and international markets. Manali is an important adventure tourism destination for trekkers, hikers and bikers, and is also a critical gateway to another notable destination, Leh, and other renowned Himalayan trails. The tourism economy in Manali has, until recently, been locally owned and made up of independent business owners who operate at small to medium scale.

Most tourists visit the Palace of Winds when in Jaipur. The unique building is part of the women's section of the enormous City Palace at the center of Jaipur.

c. A spatial and territorial mapping of select regions through open street mapping was undertaken to understand the integration of local businesses into the tourism platform economy in one of the selected sites. The integration of the two major platforms in the hotel sector – MakeMyTrip and OYO Rooms – was analysed for the period 2016-2019 through available Open Street Map data to trace the proliferation of both platforms in one of the sites included in the study. Cluster map 1 indicates properties listed on MakeMyTrip in Jaipur per year between 2016 and 2019, and map 2 shows properties listed on OYO Rooms per year between 2016 and 2019.

Chapter 3
Tourism in India

3.1 Government policies and approaches

Despite its historical economic importance, tourism has been under-prioritised as a policy area in India, given its connotation as a "soft" economic sector. In terms of key policies, the most notable is the National Tourism Policy (NTP), which was formulated in India in 2002 and subsequently updated in 2017 when the Government of India also launched its "Incredible India 2.0 marketing campaign". This campaign focussed heavily on online marketing strategies and launching an app for tourists. However, given the multiplicity of destinations within India that appeal to varying interests, age groups and budgets, tourism development has relied to a large extent on governments at the state level. State governments, e.g. in Kerala and Rajasthan, successfully target foreign tourists by forging a strong destination identity and branding via social media campaigns around specific themes and cultural aspects, and developing new attractions (such as festivals and parades or wildlife and tiger conservation).

Intersections between tourism and local development

In regions where tourism is the primary source of revenue, such as Goa (a popular beach destination) and Uttarakhand (a mountainous state), tourism divisions driven by the promise of expanded revenues have exercised considerable influence in determining the course of local development. There has been an eagerness to facilitate the entry of large hospitality chains for resort development and tourism infrastructural investments. On many occasions this has led to illegal land acquisition or the flouting of zoning laws and the privatisation of community resources (such as beaches and forests). Tourism development in India intersects with the local economy, livelihoods and sustainability, showing a worrisome trend: bureaucracy-led development and planning for tourism are shrinking the space for local agendas and weakening local participatory mechanisms, such as the involvement of panchayats (village-level councils) in local development (cf. Dasgupta et al., 2016; Murkutla et al., 2017). Even progressive tourism practices, such as ecotourism, are mostly conceptualised and implemented without including local stakeholders, as

has been found in the case of Uttarakhand (cf. Pande & Sharma, 2018). The unregulated entry of large platform booking businesses and OTAs is exacerbating these negative effects.

Legacy governance issues

Problems with regard to tourism management and practices in India remain a challenge and severely impact both local communities and the environment. The effects of the high influx of tourists over decades is starting to show, e.g. in the Himalayan Region. In the media there are reports of problems, e.g. increased vehicular traffic and acute water shortage, in popular summer hill destinations such as Shimla, Mussoorie and Nainital.

Box 2: Facts and figures on India's booming travel market

Travel and tourism in India contribute close to 10 per cent to the national Gross Domestic Product (GDP), 88 per cent of which comes from domestic travel.

9 mio

100 mio

India sees high volumes of international and very high volumes of domestic travellers. (cf. PATA, 2018; WEF, 2017).

70%
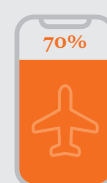
70 per cent of travel in India is researched or booked online – making it the highest-ranked digitally dependent traveller nation (cf. Travelport, 2017).

30%

The Indian travel market is projected to grow at an annual rate of 11 per cent, hitting $48 billion by 2020. The hotel sector alone is expected to hit $13 billion by 2020 with online hotel bookings making up $4 billion of the gains. Budget and mid-scale hotels are expected to make up 52 per cent of the total market share within this (cf. Google & BCG, 2018).

Pilgrimage and religious tourism takes place as a "procession" during particular times of the year, with large contingents of visitors navigating highly congested mountain routes, their footfall eroding and degrading hill terrains. Support facilities for visitors (toilets, tents and campsites, meals) are set up without much concern for waste management and disruption to the lives of local communities. Pollution and contamination of water bodies and improper waste management has led to an increased incidence of ill health among local residents (cf. Equations, 2017).

The high visitor density along narrow and congested routes has also made these regions more disaster-prone (cf. NITI Aayog, 2019). Despite the repeated occurrence of fatal landslides, flash floods and avalanches in these fragile regions, crowd management and infrastructural support by tourism boards and concerned public authorities has been largely ad hoc. Similarly, carrying capacity and footfall projections often do not fully take into account the environmental consequences for the sensitive mountain ecology. Even restricting visitors through daily quotas has not worked (cf. Niti Aayog, 2019). The entry of OTAs into a scenario marked by a lack of institutional and regulatory frameworks has only exacerbated the problems of overtourism in India.

Local people, such as this organic farmer in Uttarakhand, India, must participate in tourism planning and development in order to profit from it in the long run.

Attempts to regulate digital tourism

In early 2019, the national Ministry of Tourism rolled out a scheme for the "Approval of Online Travel Aggregators (OTAs)" in a bid to "encourage quality standards and services." Under this scheme, an OTA (defined by the Ministry as "an intermediary/agent selling travel products and services such as airlines, car rental, cruise lines, hotels/accommodation, railways and vacation packages on behalf of suppliers, using internet as a medium" (cf. Ministry of Tourism, Government of India, 2019) needs to submit an undertaking which:

- confirms that properties and services listed on the platform are duly registered with appropriate authorities in India and are licensed to run operations,

- agrees to share the responsibility along with the host entity for maintaining quality standards, comfort, safety and security of all offered travel and related services,

- agrees to carry out mandatory physical verification of properties and suppliers and ensure that veracity of the declarations made by the hosting entity and facilities/services/amenities/products promised to the customers are actually present on the ground,

- understands the crucial nature of the sensitive personal data or information provided to it by both the buyer and seller, and that the integrity and confidentiality of such information shall be protected as per the Information Technology (Reasonable Security Practices and Procedures and Sensitive Personal Data or Information) Rules, 2011 and other laws/acts/rules prevailing in India from time to time.

However, this programme is currently voluntary and several large platforms such as MakeMyTrip (MMT) have insisted that this regulation does not apply to them. MMT held that its platform could not be assessed for the quality of service of the inventory offered since it was a technology platform and not a tour operating company (cf. Economic Times, 2019).

3.2 The industry landscape

Over recent years, India's tourism sector has steadily become more competitive, rising from 65th in 2013 to 40th in the Travel & Tourism Competitiveness Report 2017 (cf. WEF, 2017). Market trends, as observed by a number of industry reports, show that the Indian travel market is sizeable and has been projected to grow at an annual rate of 11-11.5 per cent, hitting $48 billion by 2020 (see Box 2).

The number of Indian consumers with internet access has more than doubled in the last three years. By 2020, nearly half of all urban Indian buyers will be digitally influenced, of which two thirds will buy online (cf. Google & BCG, 2018). For instance, booking railway tickets for the enormous national rail system, which is administered by the state-run Indian Railway Catering and Tourism Corporation (IRCTC), is often the single

and only online transaction many Indians currently make. It is therefore considered a key gateway to getting more people to engage in online travel and e-commerce in general. OTAs have thus integrated IRCTC ticketing at significantly high costs, charged by the latter, to be able to offer this service to customers (cf. Ramanathan, 2019).

With regard to the domestic platform economy, the following trends in the Indian tourism sector can be observed:

Strong hold of Indian platforms

Domestic platforms reign supreme through aggressive expansion strategies and market consolidation. While India is a key market for many global travel platforms such as Airbnb, TripAdvisor, Booking, Expedia and Trivago, the country also has a large domestic platform ecosystem that operates in travel and tourism services with over 30 active players. These include popular booking, ticketing
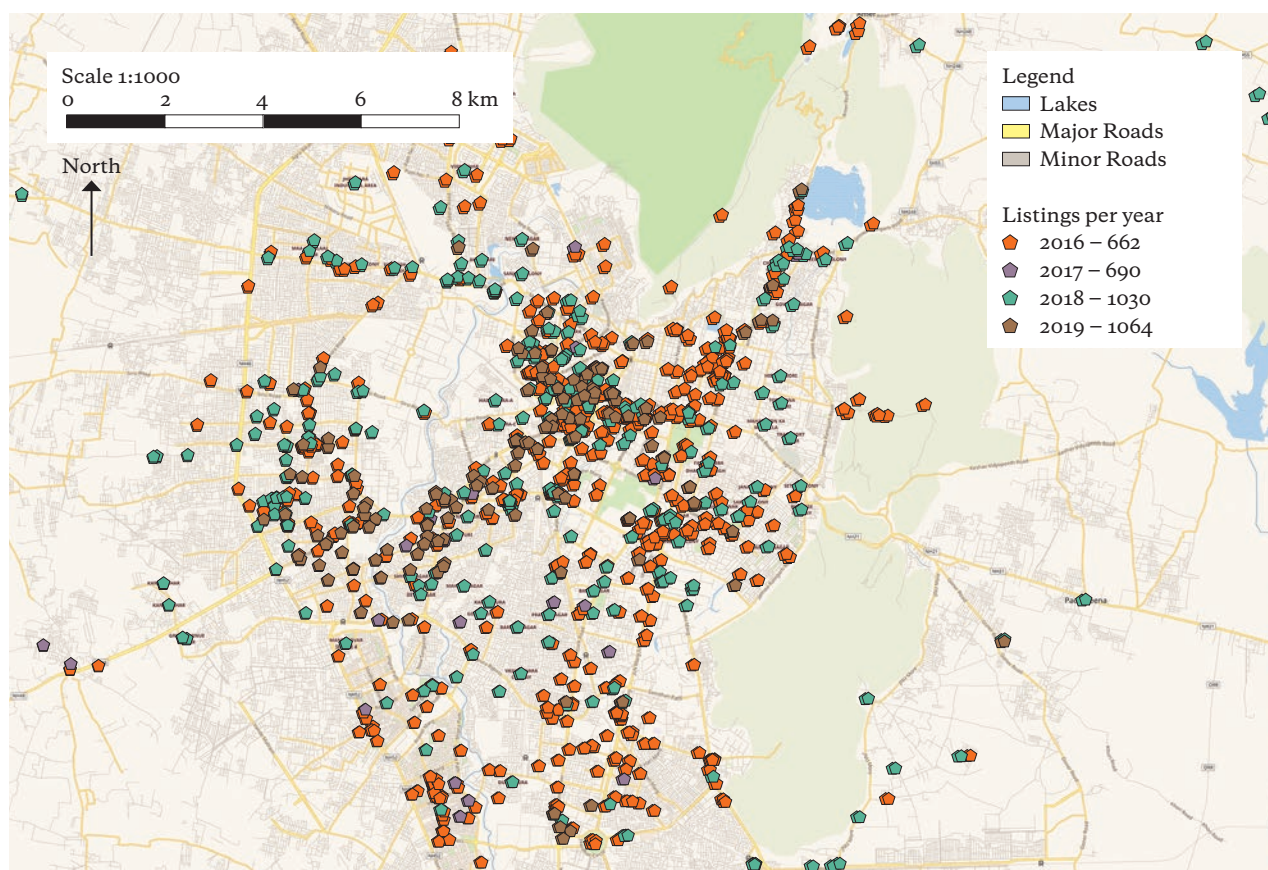
Map 1: Map of listings across years on MakeMyTrip in Jaipur
Author: Yogesh Kumar, IT for Change, © OpenStreetMap contributors
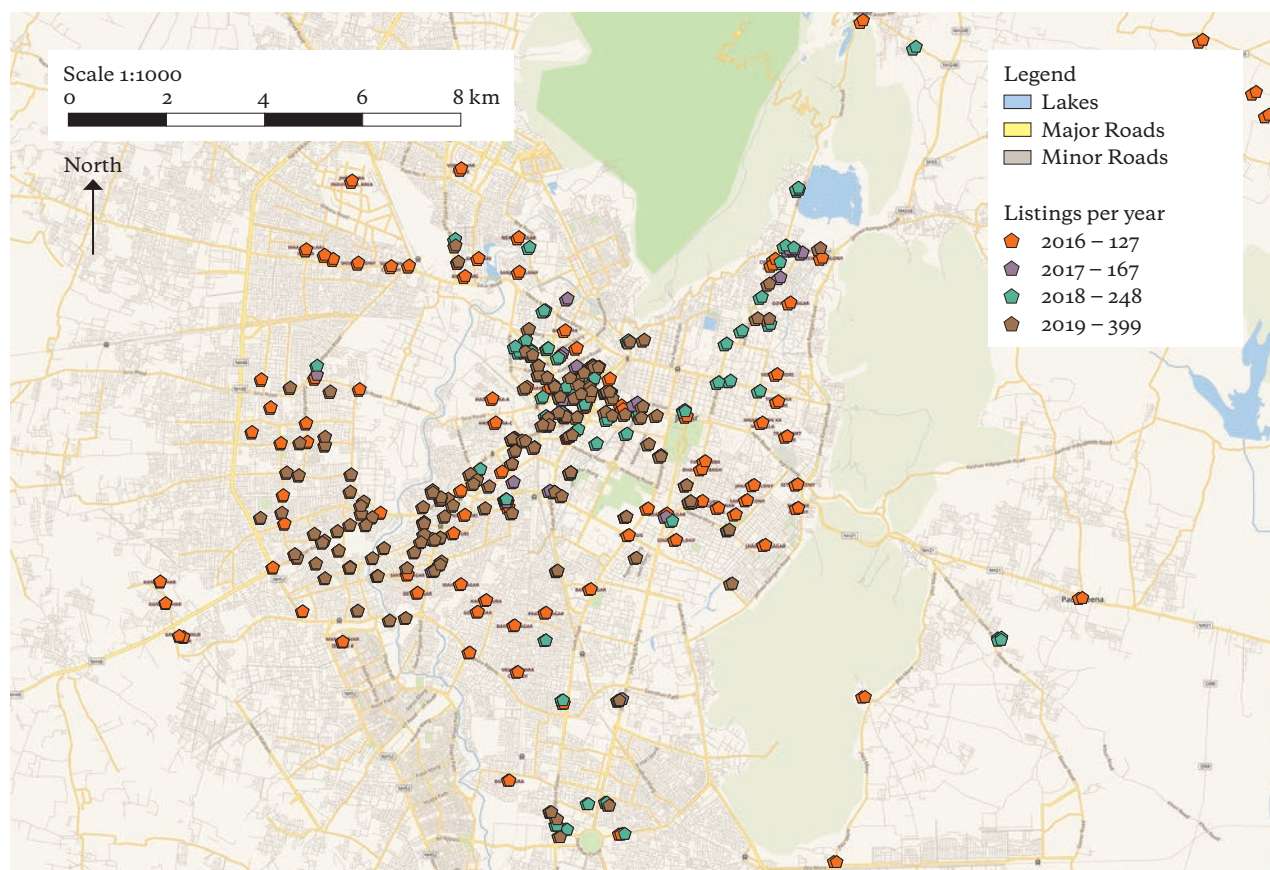
Map 2: Map of listings across years on Oyo in Jaipur
Author: Yogesh Kumar, IT for Change, © OpenStreetMap contributors

and itinerary planning platforms, such as MMT, OYO Rooms, ClearTrip, Yatra and Redbus, as well as newer alternative ventures, such as Ithaca and White Collar Hippie, which offer personalised travel consultations and services. Niche tourism platforms, such as Thrillophilia, Deyor Camps and India Hikes, offer adventure tourism services. SeekSherpa and Padhaaro, offer local guides and tour experiences and also illustrate the kinds of platforms that have emerged.

Indian OTAs expanded aggressively in the past decade. A few large players have cornered a bulk of the market share and dominate the market, displacing traditional tour operators, ticketing agents and hotels. MMT is the oldest and one of the leading market players. It was founded in 2000 as a platform to facilitate ticketing for expat Indians residing in the US and later expanded to the Indian market with other offerings, including accommodation booking, itineraries as well as bus and rail ticketing.

Over the years, MMT has edged out competition from other domestic contemporaries such as ClearTrip and Yatra, acquired stakes in a slew of travel verticals and small platforms, and even bought out its toughest competitor, Goibibo. Together with Goibibo, MMT controls close to 70 per cent of online hotel bookings in India (cf. Mishra, 2018). Map 1 shows the proliferation of MMT-affiliated hotels in the city of Jaipur through a cluster map that traces the listings of properties in the city between 2016 and 2019. From 662 hotels in 2016, the platform nearly doubled its listings to 1,064 hotels by 2019.

MMT's toughest competitor is OYO Rooms. The platform has seen the kind of breakout success that has been typical of VC funded unicorns. OYO Rooms started in 2013 as an aggregator and intermediary for mid-range and budget hotels. Given the lack of standardisation and information asymmetry that impedes tourists from booking budget accommodation, it delivers a unique value

proposition. Hotels associated with the platform are able to list inventory under the OYO brand. Consumers feel more comfortable booking rooms at low-end hotels as the platform promises a common minimum experience. OYO's growth in India and other international markets has catapulted the platform to one of the top ten hotel chains in the world, currently listing 173,000 rooms as part of its total inventory (cf. OYO, 2019). Map 1 shows the listings of hotels with the brand from 2016-2019 in the city of Jaipur. As the data shows, in 2016, OYO Rooms started with 127 properties in Jaipur, a number which rose to 399 in 2019. The cluster map also shows us the geographical spread and presence of the platform. Listed properties from 2016 are largely scattered across non-central areas of the city. But by 2019, a dense clustering of OYO Rooms properties in the more central (i.e. more touristic) parts of the city can be observed.

The fact that platform companies from other sectors are making ambitious forays into the tourism sector

70 per cent of travel in India is researched or booked online making India one of the most digitally dependent traveller nations worldwide.

shows the market's potential. A notable example of this is the fintech and e-commerce platform Paytm. It began by offering currency exchange services on its platform and gradually expanded to offering rail and flight ticketing services. Paytm has continued to make strategic investments in online travel through acquiring Infinity Transoft, a ticketing and logistics software company, and has outlined an expansion plan of $35 million for the travel market, noting in a statement that "our goal is to become India's go-to destination for all travel needs" (cf. Paytm, 2017).

Difficulties to adapt to the Indian market

Global platforms see middling success but remain in the fray. The strong hold of Indian platforms on the Indian domestic market and the emergent duopoly between MMT and OYO Rooms in the OTA segment (cf. Box 3) has meant that international platforms such as Airbnb and Booking have faced slower growth trajectories in the Indian tourism market compared to their global performance. While they have been profitable, and seen significant uptake among Indian travellers, they have not been able to overtake Indian platforms in the way multi-national platforms have in the case of e-commerce (Amazon versus Indian Flipkart) and ride-hailing (Uber versus Indian platform Ola). For example, the revenue of Airbnb's India entities stood at approximately $8 million in 2018. In the same year, Airbnb's projected revenues in China were $130 million. Currently, India only accounts for a small percentage of Airbnb's overall listings. The homestay market has been lukewarm in its growth, thus limiting the success Airbnb has been able to achieve in the country (cf. Vandana, 2019). As Indian tourists have far more budget options to choose from and rarely take to DIY travel, homestays remain a niche option.

Similarly, Booking, which is part of the world's biggest travel company, Priceline, has not been able to garner an edge over domestic platforms. Given its business model, where transactions happen at the hotel end, the platform has been unable to participate in the deep-discounting practices (through additional cashback and digital wallet credit) that most Indian OTAs have followed in a bid to win customers, and thus lost out on capturing market share (cf. Srivastava, 2017). On the other hand, major OTAs are banking on their success on home turf in order to expand into overseas markets, particularly where there are large populations of Indian expats.

remains very questionable, especially in markets where customer loyalty is fickle and contingent on deep discounting. Additionally, organised pushback and counter-strategies from other actors in the value chain (hoteliers and restaurant associations) against the current terms of engagement and a possible antitrust ruling from the Competition Commission of India (CCI) could signal a new turn in the policy landscape. It is, however, important to note that the bigger players who control the market are able to retain their place thanks to their data power. To change the current course of the online travel market may hence require new regulatory intervention in the direction of disallowing vertical integration – a modus operandi of choice that Big Tech adopts for data consolidation.

Online ride-hailing services are growing increasingly popular in India. The American platform Uber faces strong competition from the Indian platform Ola.

Venture Capital drives platform growth

Financialisation is a key driver of OTA market expansion. VC and global investments have been a major factor in spurring on big platform growth. MMT, which began in the pre-VC era, has recently seen major investment from Chinese platform Ctrip, which currently holds a majority stake in the company (cf. Russell, 2019). In 2018, OYO Rooms joined India's ever-growing list of unicorns through a $1.5 billion funding round backed by SoftBank. Apart from mainstream OTAs, niche travel platforms such as Thrillophilia, which provide adventure tourism services, have also been able to attract considerable VC funding. This has allowed domestic OTAs to expand and diversify at a rapid pace (as detailed in the previous discussion), acquire smaller outfits and capture consumer loyalty through large discounts and network perks.

However, the promising revenue growth registered by most of these players must be weighed against the fact that venture capital currently offsets a bulk of the huge losses that platforms incur by employing these tactics. The long-term viability of these platforms therefore

Chapter 4
Risks and opportunities for local tourism enterprises

The market trends in the OTA sector captured here are not merely a numbers game. They are playing out in local tourism economies in critical ways, impacting several actors and stakeholders, changing on-the-ground practices of tourism and local economic relationships and bearing upon important ecological questions of sustainability. The local tourism economy is largly build on micro, small, and medium enterprises (MSME).

Creating unequal benefits and risks

Platform impacts differ, as do the opportunities and challenges they engineer. The extent and nature of platform disruptions faced by local actors vary based on the given geographical context and the specific locations of actors in terms of their business operations.

Tour operators. In Jaipur, the tourism market is very mature, with a high inflow of inbound foreign tourists from older, high-income demographics. This is a target group that typically seeks a moderate to very high degree of personalised intermediation. Therefore, traditional tour operators and travel agencies have managed to

retain customers despite the growing presence of travel platforms. Tour operators in Jaipur recognised the advent of OTAs as something to be taken seriously. However, overall they remained confident of being able to sustain their businesses in the medium to long term because they view their role as critical. The head of a Jaipur-based pan-Indian tour operating company, which has been in business since the 1950s, had this to say about the continued relevance for businesses like his, especially in the inbound sector:

Europe [like India] is an equally complicated destination but it's so simple to organise things on your own [as a traveller]... In India, there is [a] lack of transparency and there is active misinformation, which is why I think we have business. Because people want somebody who is reliable and trustworthy and who can put things together for you... For example, if you have booked a cooking class, you still have to call the day before, ask for directions, tell the driver, etc... If I book [the class] for them, then it all becomes my responsibility, so they are free to spend time on doing other things, taking pictures and not worry about all that. These are the people who realise that if you use a tour operator, you have a concierge service at your disposal.

As many buildings are built with yellow and pink sandstone, like the Amber Fort, Jaipur is also known as the "Pink City". Its visitors value relatively high levels of personalised interaction allowing established tour companies to compete with online platforms thus far.

For guides and micro-entrepreneurs offering cultural and specialised tours in Jaipur, platforms have been a positive and important venue of engagement. For mainstream guides who lead tours of monuments and archaeological sites (where only certified guides can offer services), travel platforms such as TripAdvisor have offered a space to establish an online presence and reputation (through reviews and ratings), attract visibility and customers, and expand their business.

In many cases, guides are also savvy enough to recognise the currency of Instagram tourism and draw from their knowledge to make it a selling proposition. *"When I lead my tour group on a tour of the fort [the Amber Fort in Jaipur], I tell them exactly at what points and places to stop for a good selfie or a picture, so they can post on social media. It makes them very happy,"* said one respondent, who was the president of the Jaipur Guide Association.

Others who offer guided walking tours of the historic city and marketplaces, or lead specialised history or cultural tours, were mostly hobbyists and amateur enthusiasts. They felt that platforms had afforded them an opportunity to turn a niche passion into an enjoyable and additional revenue source, as well as a chance to share their knowledge with others

In Manali where a bulk of tour operators organise adventure tours, such as trekking and biking, respondents reported a grimmer outlook as a result of platformisation. These operators have seen their businesses diminish substantially on account of competing services offered by online travel platforms at highly attractive discounts. Manali, unlike Jaipur, is a smaller destination, which does not receive many high-end tourists seeking human intermediation, nor does it enjoy a well-oiled state apparatus working on tourism. Consequently, the disruption to local businesses has been brutal to say the least. *"Any activity that happens in Manali nowadays doesn't really happen directly. Very few people do direct business. A lot of it happens through OTAs,"* noted the head of the local association for adventure tour operators in Manali, who pointed out the ways in which OTAs had smaller operators beat in terms of visibility, pricing and responsiveness.
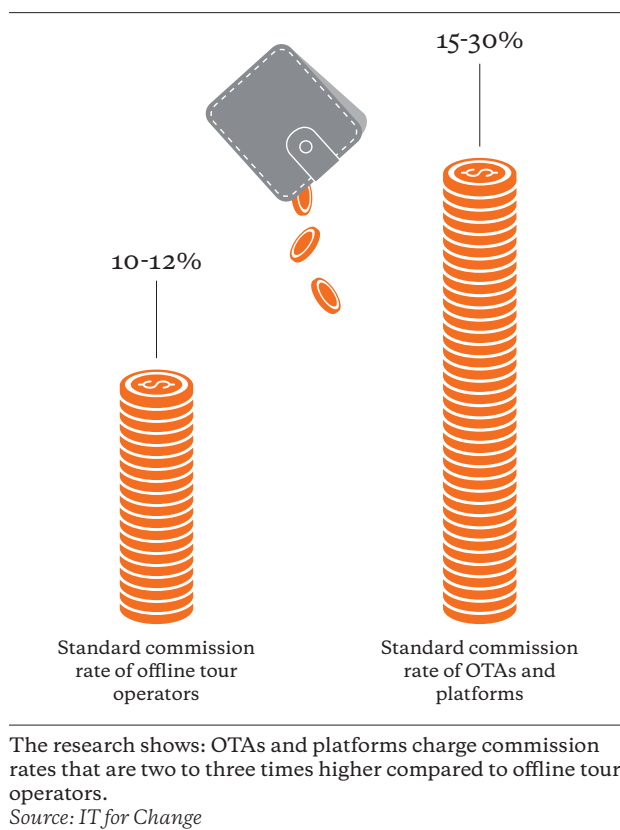
If you search online for Hampta pass trek [a popular Himalayan trekking trail], you will not find a single tour company from Manali at the top of the search results. If a name does come up, the company doesn't have the capacity to offer fixed departures. Even if the operator does, he is not going to be able to reply to your query before two days.

He may be online. But he doesn't have a back-office to aid his operations and he can't come back to you immediately. The moment you don't receive an instant response, you go elsewhere. Our costs, which are based on traditional trekking practices where you carry your gear on the go, are high because we don't have fixed camps. Everything – the cost of our mules, porters, camp-help – everything goes up as a result. We have to calculate all of those into our quotation. If we are able to arrive at INR 16,000 based on these calculations, an OTA is able to give you the same at INR 9,000. This is primarily because they have fixed camps up on the route, where all [the] supplies have already been stored. When you look at our costing for 16,000 and theirs for 9,000, why would you want to go with us?

The heavily reduced prices offered by adventure platforms have also depressed the overall market for adventure tourism in the region, prohibiting operators from increasing their package rates for the past two to three years, even as they continue to lose customers by the droves. Some operators have in effect begun to wrap up their operations, no longer seeing any incentive to be in the game. *"Travel platforms offer a six-day package at INR 6000-7000. Our cost is that per day! We can't sustain below that,"* observed one operator, who said he had not undertaken a single trek in the past five years on account of the competition from platforms.

Another long-time tour operator in Manali, whose clientele include veteran mountaineers from across the globe, claimed that the outlook for small operators looked dire without serious intervention. *"If this pattern goes on, then we will be like an extinct species in two years. They are going to take over everything,"* he said.

Hotels. Hotel businesses, where platformisation has been most pervasive, have been one of the most affected actors in the tourism ecosystem, as voiced by respondents in both Manali and Jaipur. Budget and mid-range hotels, as well as stand-alone high-end boutique properties, increasingly rely on platforms for online visibility, customer traffic and bookings, and list large portions of their inventory online (anywhere from 25 to 40 per cent of total rooms available). This is not an advantageous position for this segment of hoteliers, who see very narrow profit margins when compared to international luxury hotel chains. To put this into better context, the standard commission rate charged by tour operators on hotel bookings has been 10-12 per cent. Interviews with

15-30%

10-12%

Standard commission rate of offline tour operators

Standard commission rate of OTAs and platforms

The research shows: OTAs and platforms charge commission rates that are two to three times higher compared to offline tour operators.
Source: IT for Change

refund policies offered by platforms, with customers cancelling at the last minute, costing them business. One hotelier observed how customers had learned to game the discount and cashback schemes offered by platforms:

> *Last year, through Goibibo or MMT, I used to get reservations four months in advance – very high-value reservations – and then closer to the date, they used to get cancelled. Then I realised that when you're making a reservation on Goibibo or MakeMyTrip, you get a certain amount in your cash wallet [the platform's digital cashback system], which you can use for your next booking. So, say I am sitting in Delhi and I make a reservation for Manali, four nights, two rooms for INR 80,000. After making a payment of INR 80,000, I get cash in my wallet for INR 3,000 or INR 4,000. My actual plan is to go on vacation within 15 days. So I make a reservation for a flight using that cash, go to Goa, have fun, come back and make a cancellation.*

Further, issues of large unpaid dues by OYO Rooms were reported by several affiliated hotels in 2019 and fraud cases have been registered against the platform for

hoteliers undertaken for this study show that with OTAs, this number has varied greatly, ranging from anywhere between 15 and 30 per cent.

Hoteliers reported feeling squeezed by the steep commissions charged by platforms and the constant pressure to offer discounts to guarantee that the platform would give them better visibility. *"Discounting is like a drug. This is a very new market. People [referring here to tourists] who've recently gotten on the bandwagon, they really like the discount feature,"* observed a budget hotelier from Jaipur. Hoteliers also expressed frustration with unilateral actions taken by platforms, which included pushing rankings up and down, diverting customer traffic to other properties (presumably on account of preferential deals struck with those properties) and offering additional discounts on tariffs through wallet credit and cashback schemes. These measures not only eroded the hoteliers' revenues (when customers booked rooms but cancelled later on), but also limited their ability to charge full price through other channels, as their own standard rates and what OTAs ended up offering would result in a price disparity. Hoteliers also observed that they bore the brunt of easy cancellation and

OYO Rooms and MMT have to defend themselves in court for abusing their market power. The outcome of this lawsuit will likely set a precedent for e-commerce regulation in India.

Box 3: CCI and the MMT-OYO Rooms Deal

Symptomatic of how global platformisation has panned out in most sectors, digital companies in the travel space too play a now familiar game. They draw consumers in through deep discounts and scale-based operations and allow cash burn to offset substantial losses for extended periods, thereby cornering market share, edging out competition, co-opting all other actors in the ecosystem and establishing an unbeatable network effect through added sticky layers (like wallets and seamless customer services).

An apt illustration of this is a preferential listing agreement that was struck between OYO Rooms and MMT in 2018. MMT delisted competing leading hotel chains from its platform and agreed to open up customer data to OYO Rooms to allow integration between both the platforms' wallet and loyalty programmes. This resulted in a tightened hold over the mid-range hotel segment, which today stands almost entirely platformised.

In response to this and other OTA practices, in 2018 the Federation of Hotel and Restaurant Associations of India (FHRAI) brought to the Competition Commission of India (CCI) an allegation of abuse of individual and collective market power by OYO Rooms and MMT. Charges included that of exorbitant commissions, restrictive listing practices, manipulation of supply and demand, predatory pricing and undercutting of hotels' tariffs, using algorithmic manipulation unilaterally to affect hotels' visibility, pocketing extra service charges from customers on behalf of the hotel (without remitting the same) and charging a Performance Linked Bonus (PLB) for room sales. The de facto cartelisation of the hotel market through the MMT-OYO Rooms deal was also pointed out as an abuse of market power.

Although, in the past, the CCI had approved the MMT-Goibibo merger and had cleared OYO Rooms of anti-competitive practices in a previous case, here it has noted significantly that: "the intervening period has seen the online travel portals and the customised service that they provide to consumers on account of big data analytics to have established a distinct and significantly more prominent position in the hotel reservation space in India." (cf. CCI, 2019).

Noting the increased usage of OTAs in India, the CCI observed that in effect they could be considered a "distinct mode of distribution", lack of access to which hampered consumer reach for the hotel industry (cf. CCI, 2019).

In October 2019, the CCI identified the existence of a prima facie case for investigation against MMT and OYO Rooms for alleged anti-competitive practices. The authority called for an investigation into claims put forth by FHRAI on the issue of price parity, exorbitant commission, predatory pricing and service fees, and has asked for an internal probe-based report to be submitted within 150 days. The outcome of this case is being closely watched by many platform companies given the important precedent it could end up setting in the e-commerce domain, paving the way for policy and regulatory reform.

Separately, in a report on e-commerce, which was released in January 2020, the CCI has addressed the issue of deep discounting, observing that "given that multiple major platforms in the same markets are stated to be engaged in this practice, what seems to lie at the core of this issue is an imbalance of bargaining power between platforms and businesses" (cf. CCI, 2020)

the same reason (cf. Dash, 2019). It was learned during the course of this research that an unofficial blacklisting of the platform is currently prevalent among many hotels across cities, along with formal regulatory action that has also been taken up (see Box 3).

The dissatisfaction with current OTA practices does not mean that hoteliers have not understood the growing relevance of the online travel market and recognise the opportunities for reaching new clientele, gaining online visibility and accessing new revenue sources. A positive

perspective was also put forth by a renowned heritage hotelier who opined that stand-alone properties have benefited from being able to bypass the traditional agent and reach clients on more advantageous terms as well as gain larger visibility.

Homestays. Homestay owners who operate on platforms such as Booking and Airbnb largely reported a positive experience of platform association. With all respondents interviewed, homestays were operated as a way of converting

Homestays in Tirthan Valley. Not all travellers know what to expect when booking a homestay via an online platform. Staying in a family's home is a unique experience that needs more explaining and managing of tourists' expectations compared to staying in a rather standardised hotel.

unused property and extra space into a monetisable asset and treated as a supplemental and/or seasonal source of income at best. Connecting to platforms significantly changed the way homestay operators – a majority of them affluent or propertied – viewed their enterprise and the stakes for success within it. For those who had built a business through platforms in Jaipur, the business was a welcome way to bring in extra earnings. For others in Manali, who took in seasonal guests for some parts of the year, platform listing or lack of it, did not register as a necessarily important factor in terms of impact to livelihood, as it was merely meant to provide a bonus to existing channels of revenue such as apple farming.

In Tirthan Valley, a relatively more off-beat destination situated about an hour away from Manali, a different perspective comes through from homestay owners. The valley has an established cottage industry of renowned homestays, some of whom count themselves among the oldest of such establishments in the country. Here there are increasing concerns about the creeping advent of platform players and what it means for the valley, a bulk of which falls under the protected area of the Great

Himalayan National Park (GHNP). These concerns have been centred in the way these homestay owners work with platforms, as one homestay owner noted:

We have been associated with platforms for a year now. But we are very careful in how we take bookings. There is a pre-approval process we follow. When someone wants to book, we talk to them, we tell them we are in a very environmentally friendly place and we don't allow loud music because birds and aquatic life get disturbed. We don't allow shouting or any kind of pollution in the area. Sometimes we lose business because of that. But a lot of people appreciate it also.

The valley's tourism business primarily consists of a tight-knit group of local-owned businesses who have operated successfully through referrals and a loyal trove of repeat clients from the pre-internet days. They expressed their concerns about an increasing platform presence as newer establishments, which did not enjoy their competitive advantage, have come to depend on OYO Rooms and MMT for business. While older homestay owners do not necessarily fear loss of business yet, they worry about the cascading impact of OTAs on the area and the inevitable tariff wars and overtourism problems it will usher in. Despite recognising the problem, the homestay owners are not sure about how to tackle the issue. *"We cannot tell them [newer homestay operators], don't go with them (OTAs) or don't sell on OYO. How can we? Won't they turn back and ask us: you've enjoyed steady earnings from this business for so long and you don't want us to prosper?"* explained one homestay operator.

Homogenising the tourism experience

Discovery and serendipity, the hallmarks of travel, have today given way to experiences that are designed by platforms through data-based decision-making. Platforms eliminate pain points in transactions and interactions, and offer many different choices. Thus, they create the illusion of offering boutique, tailor-made experiences to the traveller, but in effect, they merely engineer data-based product-service hybrids. In an industry that essentially relies on networking between customer and service provider, platforms create trust infrastructures. By gathering

informational power, they manage to delocalise and depersonalise the travel experience. The average traveller does not need to interact with a small bike shop owner in Manali when enquiring about a biking expedition from Manali to Leh, nor do they have to rely on patchy and intermittent e-mails back and forth. Instead, with a few clicks, they can make decisions based on information and data points offered by a travel platform at a rate that is unbeatable. As one adventure tour operator noted, customers who go with OTAs often have little interest in trekking or adventure. *"They look at the costs and take the rest for granted,"* he says.

Travel decisions thus become heavily brokered through the platform's trust infrastructures (where to go, where to stay, what to see, what to skip, where to eat), which serve as a minimum guarantee and a set of givens against which come to define a particular tourism experience. On the other hand, through the process of platform integration, disparate service providers also begin to standardise aspects of their business, online presence and social media narratives in order to be a more reliable option and better leverage their association with the platform. To a large extent, seamless experiences and cheap prices trump locally situated offerings or local knowledge, even when, paradoxically, the platform's trust is built on the foundations of local knowledge. As one tour operator observed:

> Who fed them [the platforms]? Who gave them data, who designed programs for them? They've listed all of us but all the queries come to them. Nobody identifies us. They could get a query for my treks, but they could give it to anyone, take the business themselves or even use it to bargain with me.

Lacking local benefits

Consolidation and oligopolistic alliances distort the sector and impoverish local networks, undermining the local economy. Platform practices have caused deep and disruptive shifts in the local economies of tourism that were researched for this study. The resilience of traditional actors and locally embedded networks, and their modes of economic activity have been put to the test by the onslaught of platformisation, with many losing out in the process. While platform mediated tourism must, perforce, play out in the local context, the "local" often does

When designing their products and packages, OTAs and platforms rely heavily on local experts, actors and networks. However, once they are established, the local players benefit little from those tourists who book via the platform.

not see any noticeable gains. *"The locals in Manali, the shopkeepers and others, etc., what do they get from the influx of these (platform-led) tourists?"* questions the head of the local adventure tour operators association, noting the way OTA-led adventure tourism increasingly happens with tourists practically "parachuted" in and out.

> The tourist [who comes for these treks] doesn't stay at a hotel here, which means he doesn't engage with a piece of the local economy here at all…We wouldn't lead treks on the first day the tourist came. We'd tell them, it's a high-altitude trek and you're from a lower altitude. You need to acclimatise so that you or we don't face difficulties on the way. So you stay a night here. If you stay a night, you visit the local market. […] you'd end up buying a shawl or a cap. This way there's some business for the shopkeepers in the market.

Platforms also take advantage of pre-existing local and personalised networks in the local economy. For instance, when adventure tourism platforms first entered the market in Manali, they did so through

partnerships and collaborations with local operators from the area. Gradually, these arrangements were reduced to perfunctory deals, with operators not only losing their customers, but also having their staff poached by platforms, while being reduced to leasing equipment to the platform companies below market rates. As one bike tour operator put it:

> They [platform companies] will come to you and tell you that they have this much business and you have got 20 bikes. So give me your 20 bikes for three months on rent. Normally you get about INR 1200 a day [for a bike rental]. But when the guy will talk about volume and you don't really have any real work, and you have taken your bikes on loan and there are EMIs [Equal Monthly Instalments] to be paid … then they will dictate terms.

Exacerbating challenges of overtourism

The economic impact has local business actors in Manali's tourism economy deeply worried. In addition, the ecological damage that is already unfolding in the Himalayas as a result of tourism practices that were discussed in earlier sections are now being made worse by mass treks (i.e. groups of 40-75) led by platform companies. This has been an equally pressing concern for the local community. The increased proliferation of solid waste in the mountains, poor trekking practices (erecting permanent tents alongside trails, setting up toilet camps close to water sources), and land-related friction with local communities (due to increased traffic, pressure on water resources) are issues that spell larger consequences for the future of adventure tourism. The lack of respect for the local ecology was attributed to the fundamentally remote nature of OTA platform operations. *"Someone who guides a trek here today will be assigned some other route tomorrow, but the locals who are associated with this business have to continue to live here. They [referring to platforms] will leave a mess behind, but it will fall upon us to clean after them,"* pointed out the head of the adventure tour association. But businesses fear that the problem ushered in by overtourism will invoke reactionary policy responses, such as blanket bans, and that these measures will only seek to hurt their livelihood proposition even more. *"The government will just say ban. It's so easy to say no more trekking,"* observed one operator. *"What*

is more important is how to ensure you can keep it going but with an eco-sensitive approach."

Lack of safety preparedness, which has resulted in accidents and mishaps in regions, has also been a concern. The Adventure Tour Operators of India (ATOAI), a national business association, has been working to reach out to OTAs and address these aspects. Much like local operators, the association is wary of ill-informed tourism practices that can trigger blanket bans for the industry as a whole.

Using platform data effectively

Data is a key asset, but not everyone is well placed to gain from it. The data practices employed by actors, with the aim of improving their business, ranged from the very basic to the highly sophisticated. Traditional and older actors, such as travel agencies and stand-alone hotels, while recognising the significance of data to the platformised tourism sector, did not express a willingness to engage and invest in data-optimisation strategies. They did work on communicative aspects, such as maintaining an online presence on social media, and

Many forms of protest against the dominant position of platforms, such as OYO, are becoming visible in India nowadays.

responding to online reviews and feedback. B2B communication layers through Whatsapp were also utilised effectively by travel agents. For instance, a Jaipur-based B2B tour operator who was interviewed for this study maintained three to four Whatsapp broadcast lists targeting about 1,000 people, which included business contacts, associates and former clients. He used the channels, along with Facebook, Instagram and Twitter, to advertise new itineraries, services and packages, and to gain visibility and new business.

Others, including a Jaipur-based budget hotel chain operator, cited budgetary reasons for not being able to maximise a data opportunity despite having a business of scale. He did, however, make use of data analytics reports received from the various platforms his properties were listed on. Similarly, homestay owners who were newer entrants to the domain were able to make use of analytics reports to work on making improvements to their services and managing their price points.

Property owners were candid about the arbitrariness of many data parameters that often affected tourist decision-making. These included ratings and reviews, visibility and customer traffic, any of which could rest on a particular negotiation and arrangement between the business and the platform. Several of the hoteliers and homestay operators who were interviewed for this study

had also experimented with preferential listing programmes and services offered by platforms. An example of this was Booking's genius programme, which guaranteed greater visibility through algorithmic search and recommend for a higher commission rate.

In many cases, analytics reports received from platforms were focussed on getting service providers to offer more discounts, or ultimately lacked any clear actionable value proposition for them to build on. A tour guide offering walking tours commented on the random inferences through data points he received. "*Within two hours on Instagram, you have a thousand likes, but it's not valuable… your photos have been viewed 25,000 times on Google. Now what do you make of this?*"

One homestay owner, who had prior experience working for a luxury hotel chain, was able to channel industry experience to do more with the analytics, including forecasting demand, determining minimum booking windows and managing price points. But for smaller businesses, especially in Manali, skill and resource gaps in the region, along with infrastructural issues, posed critical challenges to being able to harness leverage or any discernible data advantage. When asked, if they could collectively mount a local platform and list their businesses on it, operators pointed out that the overheads would make it unviable for them to explore.

Box 4: A model for community-based tourism in Uttarakhand

SEWA federation, one of the largest cooperatives in the world, works with women's trade unions, self-help groups and cooperatives across the country's key economic sectors. Since March 2019, SEWA has been working on a pilot involving women-run and operated homestay enterprises in the Almora and Rudra Prayag districts of Uttarakhand. The village-based homestay network aims to create a tourism identity around villages and to bring more women into the tourism and hospitality business, e.g. covering the provision of accommodation, food, tour guide services, etc.

To this end, the federation has partnered with Himalayan Arc, a decade-old cooperative of women-run homestays and hospitality service providers in the Munsiyari region of the western Himalayas, spearheaded by the woman sarpanch (leader) of the village

local council. The federation has provided practical inputs into how the enterprise can be set up and how the capacities of women can be enhanced.

Given prohibitive commissions and the limited digital literacy of the women, SEWA has opted to partner with small boutique companies who specialise in marketing homestays. SEWA also recognises that a long-term plan needs to include a strategy for platform engagement, but one that is forged on their own terms.

"We hope to use the pilot to advocate for cheaper commissions with platforms such [as] Airbnb," noted the pilot coordinator, suggesting that this form of socially conscious tourism that foregrounds women's economic empowerment could hit the right nerve with a niche clientele on these platforms.

Community-based tourism initiatives enable meaningful exchange between guests and hosts. On rather generic platforms, the complex nature of the experience cannot be explained in sufficient detail. Therefore, many rely on direct online communication via websites or social media.

Businesses that are built on platform models and have embedded data-based practices into their operations had a more integrated and focussed approach to maximising a data-based advantage. This includes a start-up chain of hostels where back-end operations include collecting additional data points and building guest profiles, which are then channelled into making decisions such as targeting advertisements and budgetary choices. The company was also actively working on strategies to onboard guests through direct bookings and to reduce dependence on platforms.

However, the shift in paradigm has not gone without resistance. As mentioned earlier, there have been efforts to de-list/blackball and bring regulatory action against OTAs for what have been seen as unethical and anti-competitive practices. However, much like in leveraging opportunities, we find that various actors are placed differently when it comes to their ability to push back. For small hoteliers, blackballing or de-listing from the platform has been the only way to fight back, even at great cost to their revenues. But high-end hospitality players with chain enterprises, such as the Taj, Oberoi and Lemon Tree, have been able to invest in strengthening their direct digital marketing sales and create "stickiness" out of existing brand affinity and loyalty through perks, rewards and discounts, etc. Similarly, some tour operators and enterprises are content to disengage from platforms, run through existing repeat clientele and not to pursue scale as a strategy.

Alternatives to platform presence

Alternatives succeed by pursuing platform-light strategies that focus on direct engagement. In the current context of scale-based network-data infrastructures, OTAs wield tremendous economic power. Alternatives and boutique options in the domain, which have mushroomed in the past few years, seem to recognise this and take a more hybrid approach to their businesses. They differ from traditional tour operators in that they actively engage in dynamic online presence and social media management, building strong client networks and modelling themselves more as concierge services that offer personalised customer care and a high-quality experience. These alternatives target niche tourist clientele who seek boutique experiences, do not want to engage with platforms or prefer to pursue a more socially conscious form of travel and tourism (see Box 4).

For instance, Jaipur Virasat, a foundation committed to the preservation of the cultural heritage of Rajasthan, has been working on developing a rural musical tourism circuit in the state. It involves, among other aspects, experiential tours that facilitate interactions with folk musician communities, curated shows and workshops, and a museum that has been recently set up in Jaipur. The foundation has so far opted to work with local actors such as Arya Niwas, a hotel chain in the city, as well as traditional tour operators and the Ministry of Tourism. Central concerns for the foundation are equitable revenue and benefits sharing as well as retaining the cultural ethos of the artist communities they work with. Therefore, the exploration of platforms has been guarded and slow, even while there is a recognition that the online market is an important avenue to target and a great deal of effort is put into social media marketing.

Chapter 5
Discussion

Platform integration becomes a Hobson's choice

For almost any small to medium tourism enterprise (with few exceptions), platform integration today is not an option but, rather, a survival strategy. Tour operators, hoteliers and local enterprises are required to make investments in order to optimise their online presence on platforms, regardless of their actual capabilities to do so. They must work relentlessly on their online reputation management and be responsive to reviews and feedback. Even as they face disadvantageously high commissions, eroding revenue margins on a crowded marketplace brimming with competitors, they are disproportionately reliant on online platforms for business. Data in this context becomes a centralising and disciplining tool in the hands of the platform to ensure member nodes fall in line. Actors on the platform, ever aware of the fragility of their position on the site and countered with information asymmetry, may feel compelled to respond to the data-based feedback (adjusting pricing, enrolling in discount programmes and investing in upgrading facilities) without having the assurance that these strategies will yield better outcomes.

The Hobson's choice for small actors seems to be either to use platforms on highly skewed terms of market engagement or risk being brutally ejected from the economies of tourism altogether. There is a noticeable and direct loss of revenues and opportunities for marginal actors. Traditional intermediaries (such as travel agencies, tour operators, unions and very marginal actors) who cannot or have not successfully integrated their businesses into the digital economy become obsolete.

The delocalisation of business stakes combined with increased corporate finance either via OTAs or through significant investment in real estate and transportation operations could also mean that the actual site of tourism activity will be left with the most minimum and necessary – and almost exclusively consumptive – relationship with the economics of tourism activity. Infrastructure priorities could become skewed towards privileging tourism over local development instead of there being a symbiotic relationship between the two. Platform integration seems

As more and more travellers, both in India and the world over, search for travel information and book online, tourism businesses must decide whether to accept the terms and conditions of the platforms or risk not reaching potential clients online.

to therefore suggest a moral hazard that not only affects marginal and less powerful players in the tourism ecosystem, but also the overall health of the local economy.

The potential of the platform marketplace in tourism, however, may not yet be saturated. New disruptions, whether from larger platforms in different sectors such as Paytm or, by way of alternative, boutique players and more niche platforms, show us that despite the oligopolistic tendencies discussed in this study, the door is open for unlikely entrants in this sector. Effective policies need to ensure that these opportunities are seized not only by established powerful players but rather empower smaller economic actors to find their place within the platform landscape.

Platforms determine touristic and economic value through communicative power

The communicative networks of platforms and the rating and ranking of geographies and spaces play a significant role in determining value. Even though the evidence tells us these data points can be arbitrary, the communicative power of platforms can end up mediating the gains and losses for actors. Further, they privilege those who are able to leverage the network-data advantage. First movers, in particular, who listed their services on OTAs prior to the current state of market saturation, have been able to create and maintain a strong online reputation (most viewed, most reviewed, the highest ranked, etc.) and thus establish a data-based advantage that is hard to overturn. However, new nodes/actors will find it increasingly difficult to break out into these spaces and will need algorithmically manipulated "boosts" for better visibility, specific accreditation, higher rankings, etc. In both cases, OTAs stand to only strengthen their network power. For service personnel who are at the lower ends of the value chains – hired guides, hotel service staff, waiters – ratings and rankings can easily become a punitive force. While they are now encouraged to urge customers to evaluate their performance on various platforms as part of their work, they do not necessarily benefit from these reviews, given that it only adds to the value of the enterprise. On the other hand, they remain the most vulnerable to the outcomes of bad reviews and could be subject to demotion or even termination (cf. Bentley & Maharika, 2019).

Tourism companies encourage their customers to leave positive reviews on platforms such as TripAdvisor hoping for better rankings and higher visibility online.

In emergent sectors such as homestays and hostels, entrepreneurs and freelancers could use communicative network power to their advantage. They could look towards new sources of income and livelihood by building and engaging in a strong online reputation, as the difference between a hundred reviews and five would matter less. An opportunity for alternative tourism enterprises also exists: to reach out to discerning audiences and cultivate a strong brand identity and customer preference for responsible tourism through developing and capitalising on social media engagement strategies.

Platformisation reinforces travel as a consumptive aspiration

The global growth of tourism is, at least to some extent, connected to a marketisation of geographies in the contemporary phase of globalisation and fuelled by the commodification of travel through online platforms. A mutually reinforcing, neoliberal dynamic seems to be evident between the forms of desire, experience and subjectivity,

identity and belonging that characterise consumption and use cultures of the platform age and the commodification of the datafied, millennial consumer-user, who becomes the prime target for the online travel platform. Platforms modularise, fine-tune and enhance the consumptive experience of touristic sites through data-based tactics. They are able to segment, analyse and target travellers with products and services with a perspicacity that was hitherto unavailable. Thus, platforms both draw from and contribute to the "bucket list" mentality of the millennial consumer.

For the new generation of travellers, tourism increasingly becomes an element of lifestyle. A large portion of millennial travellers choose their next travel destination based on its "instagrammability" (i.e. how much positive attention their travel photos and stories will generate among their peers on social media).

As the experience of tourism lends itself to a multiplicity of modularised offerings by big platforms, who are able to add diverse layers at low costs, local entrepreneurial autonomy risks being hollowed out in the long term. Local actors will be relegated to merely "executing" the datafied experience at the last mile.

A culture such as this raises larger questions as to how policy can govern the commodification of space and place in the digital era. Enormous venture capital in effect subsidies the average tourist. The flipside of this heightened global consumptive aspiration for travel has deeper structural impacts. As pointed out in the findings section, predatory pricing and deep discounting practices have had direct consequences, including revenue erosion and price depression for the local tourism ecosystem. The gatekeeping function that dominant platforms have increasingly distorts visibility and market access for local and smaller businesses, leaving them dependent on platforms.

Platforms effect a trust paradox

For reliable information and elimination of pain points at minimal cost, consumers count on platforms that aggregate and connect to service providers as an essential trust infrastructure. Most local economic actors, however, feel co-opted and manipulated into participating in platform activity and actively mistrust the tactics of OTAs. Under the banner of big platforms, enterprises also lose out on their ability to build up an independent brand identity or consumer affinity, thus limiting their potential for repeat clientele. This manifests itself clearly

Online ride hailing services are growing more popular in India too putting traditional taxi and rickshaw businesses under pressure. In Goa for example, taxi drivers protested against the presence of ride-hailing platforms.

in the inability of new hotels and homestays to attract clientele without an OYO branding or MMT association.

As remote orchestrators who modularise and fragment the value chain, platforms dislocate local networks of trust and disincentivise local collaboration. This is likely to result in a zero-sum situation, as marginal players forced to rely on platform mediated arrangements lose local traction, even as the platform entrenches itself into the local value chain. Organised action and resistance by interest groups, such as hoteliers, tour guides, taxi unions, etc., may not be able to make a real dent, but there is evidence of some push back in small pockets. Taxi drivers have, for instance, successfully used collective action, such as protest and government lobbying, against the presence of ride-hailing platforms in Goa (cf. News18, 2019).

Niche actors like older homestays (such as those in the Tirthan Valley) or tour operators in Jaipur who cater to high-end consumers and foreign clients demonstrate some resilience; they are able to build and sustain a brand identity based on trust and word of mouth. Homestay operators in Tirthan Valley, for example, have set up the Tirthan Tourism Development Association in an effort to retain local control over the tourism development trajectory at the destination and counter the creeping presence of platforms.

Bigger players such as international hotel chains with business at scale and existing brand affinity are also able to operate independently and expand their market base, honing better data capabilities along the way.

The India Planning Commission's 11th Five-Year Plan has also noted the importance of tourism, identifying it as "the largest service industry in the country" and highlighting its ability to be "an instrument for economic development and employment generation, particularly in remote and backward areas" (cf. NITI Aayog, 2019).

But the current trends of platformisation in this sector, marked as they are by increased monopolisation, do not hold up to this vision. With platformisation, much like in other sectors of the economy, strong and effective regulatory responses become imperative in tourism as well. Legacy laws need revisiting and urgent measures are necessary to mitigate risks stemming from over-tourism. Policy must also keep in check the inequitable outcomes spurred on by the activities of large platforms, including disadvantageous lock-ins for small actors and negative impacts to the overall health and sustainability of the sector.

But beyond that, policy has a bigger role to play in supporting and nurturing tourism platformisation and digitalisation in a way that maximises gains for local economies and actors. Given the vast employment and revenue generation opportunities that tourism can usher in, policy can also outline tech-enabled strategies that states can pursue to create additional economic opportunities, safeguard local heritage, build robust data sets and bolster administrative responsiveness to protect natural habitat.

Chapter 6
Towards the vision of an inclusive and fair digitalisation in tourism

This study, although limited to a small-scale ethnography, offers an adequate picture of the complex terrain of platformisation in the tourism industry in India and allows for a first set of generalisations regarding the challenges of pervasive platformisation along the tourism value chain all over the world.

If global tourism is to contribute to sustainable development as constituted in the 2030 Agenda on Sustainable Development, it needs to increase the social and economic benefits for the local population and reduce its negative impacts on the environment and communities. But the current trends of platformisation in this sector do not hold up to this vision. Urgent changes in policy frameworks, as well as in business conduct and travel behaviour, are necessary.

In the digital era, governments, platforms, tourism businesses and travellers must be held to account in order for tourism to contribute to well-being and sustainable development at the local level – in India as well as in the rest of the world.

The following recommendations describe the necessary preconditions for an inclusive tourism development strategy in the digital age. They must be transferred and adapted to the specific national and local context.

Recommendations for governments

Governments should review and expand policies concerning the challenges of increasing platformisation by

a. **developing a coherent pan-government data policy:** in order to better support local tourism networks, the data capacities of local governments must be strengthened. Big data programmes are needed that can help local governments and businesses plan and manage tourist inflow better, segment and target clientele more effectively, as well as understand trends and respond accordingly. For instance, understanding the trend of inbound tourists during a particular season (demographic, countries from which traffic is highest, average expenditure and time spent) can aid decision-making for issues such as where to place advertisements, what social media strategies to pursue, and so on. Drawing from existing normative and legal frameworks on data governance, governments need to build up guidelines and protocols for database generation and cross-departmental data sharing as well as mandate data sharing by private companies and platforms through pilots that maximise the data advantage for the local economy. Partnerships can be brokered to facilitate the real-time sharing of data from small companies, tourism associations, governments and other relevant actors.

b. **enhancing the capacities of the local, regional and national administration to use data-enabled tourism management:** based on local consultation, governments should define ecological and social carrying capacities and use data to monitor compliance. These programmes need to integrate and be able to pull from relevant areas, such as water, transportation, land use patterns, etc., to be able to project intake of tourists without creating resource overload. Considerable capacity building will be needed from national to local levels for authorities to transition into data-enabled tourism management.

c. **furthering anti-competition policies to limit the power of platform monopolies:** platform practices in tourism mirror platform practices in most other sectors. Curbing the excesses in tourism, then, is really about taking a more comprehensive view of the issues associated with platform governance at a larger level. It is clear that principles of consumer welfare cannot go far enough in being able to limit or prevent market dominance by one or a few OTAs through vertical integration, stickiness and preferential agreements and deals, as well as hidden and deep discounting regimes.
Governments need to ensure that stakeholders in the tourism industry are able to have fair and reasonable access to markets without OTAs being the necessary and only gatekeeper in the marketplace. The data advantage garnered by big businesses gives them a unique market advantage. Current global policy discussions around antitrust/anti-competitive practices rooted in data capital are a good start. But these measures are unlikely to go far enough. Small players are not in a position to match the efficiencies that dominant platforms provide consumers. They require public policy support on many fronts: from financing to marketing and public data infrastructure.

Tourism as well as platform governance measures must strengthen the role of local MSMEs and community-based tourism initiatives.

with respect to planning, advertising, advocating and engaging with audiences, etc. This can lead to local solidarity that will then ensure a more resilient local economy, protected from the potential shocks of speculative financialisation that fuel big OTAs. Data trusts for the industry that are held and operated by an MSME level industry associations with seed public funding can be another way to create a data advantage for small businesses. Industry association and institutions in tourism and hospitality must implement learning programmes on data literacy for the platform economy.

f. **supporting MSMEs through regulation:** informal sectors of the tourism economy, such as homestays, which are not regulated uniformly, need to be better supported and promoted through strong governance and regulatory systems based on international good practices and standards. This will help them leverage opportunities for listing on platforms, boosting local economies and also countering capital and resource-intensive tourism development. Legal recognition can also help MSMEs appeal against the bad practices of platform businesses.

g. **offering alternative platforms that provide market access to small players:** in regions where there are critical infrastructural and skill gaps, concerned tourism ministries and departments must do more to feature and promote such homestays and local businesses on their website and social media channels so they are not left completely reliant on OTAs for visibility and traffic. Tourism boards and departments can also serve an important public utility function by creating/linking to searchable databases, which are at the network-informational layer, to offer directory type listings of all local businesses. This should be maintained and updated frequently. Bali Spirit, a non-profit that runs a registry of local tourism businesses in the region of Ubud in Bali, or Tirthan Valley Homestays, a listings website set up and operated by locals in the Tirthan Valley, are some examples of low-tech solutions that could be relevant and useful for small businesses.

Incubators and other forms of funding can be made available through government programmes to seed the creation of alternative platforms managed by local organisations and promoting locally run businesses.

d. **strengthening legal instruments regarding accountability of businesses (including OTAs and platforms):** holding international platforms accountable within the national context is an important function that governments must perform. The vast constituencies who are implicated in the tourism sector are by no means insignificant. It will therefore be necessary for the concerns of local actors in the tourism industry, especially in Global South nations, to be considered in ongoing national, regional and international discourses with regard to: trade and the digital economy and the implicit issues of labour regulation in relation to servicification of the tourism value chain; taxation and extraterritoriality in terms of holding international platforms accountable; and data sovereignty to ensure that vulnerable actors and their livelihoods are fortified against the given trajectories of global platformisation.

e. **increasing the data literacy of MSMEs through training and capacity building:** public policy mechanisms must work on a combined data advantage for MSMEs

In order to bridge the digital divide in tourism, platforms must act with due dilligence respecting the rights and needs of the local population and MSMEs.

h. **ensuring tourism is environmentally and socially responsible:** strict policies that are modelled on the "leave no trace behind" maxim need to be in place that counter overtourism practices, including limits on group sizes, waste management and the demarcation of protected areas. In addition, a range of digital tools – GIS, IoT, cameras, wearables, drones and so on – can be deployed to gather data and check for overtourism through community-led models. Big data sets can be generated to preserve natural and cultural heritage, regulate footfall, beef up disaster preparedness and support human monitoring. Models like the Greater Himalayan National Park, where local communities and stakeholders (residents, businesses, governments, forest department, law enforcement) have been actively able to participate in policies around tourism, are instances that can become pilots for data-supported local management. Platform players need to be brought into the consultative structures that can collectively work with other actors to shape the course of tourism.

Recommendations for platforms and online travel agents

Companies should assume responsibility by

a. **enshrining due diligence practices:** in line with the UN Guiding Principles on Business and Human Rights, companies have the responsibility to act with due diligence and avoid any infringements of human rights. In this regard, national and international booking platforms should conduct periodic human and environmental impact assessments with regard to their activity and proactively report on their business impact along their entire supply chain. Platforms should also provide access to remedy to actors within their supply chain and develop complaint mechanisms that are effective and easily available for small-scale businesses.

b. **designing algorithms in a transparent way:** the algorithmic practices of platforms need to adhere to clear transparency guidelines with respect to listed businesses as well as consumers. These need to be incorporated into techno-design (building explainable systems) and can also facilitate redress (building accountable systems). Suggestions from the Indian CCI's 2020 report on e-commerce offer a useful approach in this regard. The report suggests including in the terms and conditions a general description of the main search ranking parameters of a platform that is drafted in plain and intelligible language and kept up to date, specifying when and how rankings are subject to direct or indirect remuneration paid by business users. This should also include a description of those possibilities and their effects.

c. **cooperating with public bodies and providing available information to monitor tourism development:** tourism companies rely on the long-term sustainability of the destinations. With their access to vast amounts of digital intelligence and analytical insights, platforms are well placed to map and monitor the tourism footprint in a given region. By proactively sharing information on these aspects (number of beds booked in peak season, footfall, water usage, etc.) with public bodies, platforms can contribute to the creation of an early warning system to avoid overtourism.

d. harnessing communicative power to inform and nudge tourists towards responsible tourism behaviour: beyond the arbitrary hierarchies of ratings and rankings that determine market outcomes, platforms should work to develop data points that can attempt to quantify social value, going beyond the classic parameters of customer experience. Metrics that can nudge consumers towards ecological and social concerns and contribute to equity and sustainability can have the long-term impact of transforming consumer consciousness, and platform businesses certainly need to move in this direction.

Platforms should afford higher visibility through listings and rankings for local businesses with a sustainability certification based on factors such as: how green is a given business? Are they locally owned/small scale/run by women? Do they hire, operate and purchase locally? Do they pay fair wages to their employees? These are but some illustrations of how different data points could be used by platforms to create social value rankings, which could then persuade tourists to make different decisions about their travel choices.

Recommendations for travellers and tourists

They should travel responsibly in the digital age by

a. making informed travel decisions: go beyond the Instagram-fed allure around tourist destinations. Instead of accessing handy information about sights and accommodation from OTAs, tourists should also seek better data regarding the environmental and social circumstances of the host country and factor these in when making travel decisions.

b. using platforms responsibly: where possible, tourists should opt for smaller and specialised platforms or book directly with providers through their own marketing channels. Tourists should use feedback instruments, such as reviews and ratings, in a responsible and adequate way that takes into account the local context.

c. leaving space for offline interactions: tourists and travellers booking everything in advance or on the run support the power advantages of dominating platforms. Choosing excursion providers and restaurants by checking the offer on the spot is a way to actively contribute to preserving a diversified tourism experience and avoiding the data-led homogenisation of travel.

Tourists can do their part in order to ensure that their hosts profit from tourism as much as possible.

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