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Published Version

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Miguel, C., Načinović Braje, I., Drotarova, M. H., Dumančić, K., Kirkulak-Uludag, B. and Giglio, C. (2024) The effects of the professionalization of hosting on service quality: towards quality standards and certifications within the short-term rental market. *International Journal of Hospitality Management*, 122. 103796. ISSN 1873-4693 doi: 10.1016/j.ijhm.2024.103796 Available at <https://centaur.reading.ac.uk/116630/>

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To link to this article DOI: <http://dx.doi.org/10.1016/j.ijhm.2024.103796>

Publisher: Elsevier

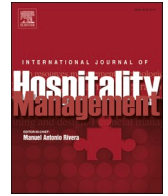
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The effects of the professionalization of hosting on service quality: Towards quality standards and certifications within the short-term rental market

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ARTICLE INFO

Keywords:

Airbnb
Booking.com
Certification
Professionalization
Quality standards
Sharing economy
Short-term rentals

ABSTRACT

This paper explores how the increasing professionalization of the short-term rental market (previously dominated by individual hosts) fosters the implementation of formal quality standards in the sector. It is based on 36 in-depth interviews conducted with different stakeholders of the short-term rental industry in six European countries, namely, Croatia, Cyprus, Italy, Spain, Turkey, and the UK, and at EU level. The article maps different initiatives that outline some quality standards for short-term rentals. We found first, that to implement quality standardisation, it is important to distinguish between private and professional hosts; and, second, that consensus must be reached on: (1) whether quality would be standardised at national or EU level; (2) which governing body should be responsible for quality certifications (e.g., governments or private institutions as in the case of ISO standards); and (3) identification of practices that should be certified (e.g., property facilities/amenities, size, health & safety protection, etc.).

1. Introduction

In the context of the so-called sharing economy (Gyódi, 2019; Miguel et al., 2022a), new technological infrastructure and platform mediation has enabled any person to offer short-term accommodation (Kuhzady et al., 2020; Farmaki and Miguel, 2022). Short-term rental (STR) platforms enable not only individuals (peers) but also professionals (companies) to advertise their properties (Gerwe and Silva, 2020; Načinović Braje et al., 2022). STR platforms imply some opportunities (e.g., empowerment of individuals to generate revenue with existing assets, improving the amount and type of accommodation offered) (Hajibaba and Dolnicar, 2018; Farmaki and Miguel, 2022). On the other hand, STR platforms may introduce some challenges (e.g., contribution to the gentrification of cities, regulatory issues, taking market share from the hospitality industry) (Cocola-Gant, 2020; Dogru et al., 2019). In recent years, the STR market has been booming most likely due to financial benefits of STRs (Manganelli et al., 2020). Nevertheless, this impressive growth was impacted by the effects of the COVID-19 pandemic on the accommodation sector (Dolnicar and Zare, 2020; Farmaki et al., 2020;

Načinović Braje et al., 2022; Miguel et al., 2022b).

Although platforms like Airbnb (dominant platform in the STR market) (García-López et al., 2020; Manganelli et al., 2020; van Holm, 2020) or HomeAway started as peer-to-peer (P2P) accommodation providers and Booking.com as a professional accommodation provider, nowadays all STR platforms offer both P2P and professional accommodation services (Adamiak, 2019; Načinović Braje et al., 2022). Adamiak (2019), in his longitudinal study of Airbnb listings across 167 countries, found that 41.5% of Airbnb listings were multi-hosted entire apartments/homes. These multi-listings may be private owners of multiple apartments (P2P), or professionals (including corporate owners and property management companies) (e.g., Adamiak, 2019; Cocola-Gant et al., 2021). Moreover, as Adamiak (2019) observed, the offer of accommodation by professional hosts is growing more rapidly than the offer of P2P hosts. Despite such increasing popularity and professionalization of STRs, research indicates that these could be associated with inconsistent service quality (e.g., see Zhang et al., 2023; Huang et al., 2020; Sthapit et al., 2020; Birinci et al., 2018), especially when compared to hotel accommodation. Professionalization and growing

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<https://doi.org/10.1016/j.ijhm.2024.103796>

Received 2 September 2022; Received in revised form 8 May 2024; Accepted 17 May 2024

Available online 8 June 2024

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business size might lead to the quality problems (Zhang et al., 2023), so the idea of possible standardization within STRs deserves further examination.

In terms of quality assurance, quality standards and certifications are commonplace for the traditional accommodation sector. For example, the hospitality industry has different ISO standards. ISO standard 18513:2003 (last reviewed in 2014) deals with the definition of terms utilized within the tourism industry to define tourism accommodations typologies and services (ISO, 2014). A more updated standard is currently under development within the ISO/FDIS 18513 (ISO, 2021b), whilst further standards - like ISO/DIS 21620 - are in progress for specific niches like heritage hotels (ISO, 2020c). However, there is not an ISO standard for STRs. Most often local or national authorities set rules on the requirements of the STR services. The logic behind is the fact that the consumer must be protected by the given standard at one side, and at the other, the accommodation provider must fulfil certain rules. In cities and countries where a license to operate a STR is mandatory, requirements usually include: proof of compliance with sanitary, fire, and minimum equipment conditions; requirements on the size of the rooms, bathroom, kitchen; disclosing the identity of the hosts; obtaining civil liability insurance; and displaying a visual identity logo in the apartment (Barcelona City Council, n.d.c.; Deloitte, 2019; Von Briel and Dolnicar, 2020), which leaves the quality of the service untouched. However, as pointed by Muschter et al. (2022), STRs often show lack of compliance with tourist regulations while regulation is necessary to address the negative impacts of the sharing economy markets.

This paper discusses the effects of the increasing professionalization of the STR market on service quality. It is indeed a complex task since “the definition of ‘professionalization’ on Airbnb itself remains unclear” (Bosma, 2022, p. 596). More specifically, its first objective is to examine insiders’ stakeholders’ point of view on the professionalization of the STR market sector. Secondly, the article gathers stakeholder’s views on the need to develop quality standards for the STR industry and points to possible features of such standards. The study is based on 36 in-depth interviews conducted with different stakeholders of the STR market industry in six European countries, namely, Croatia, Cyprus, Italy, Spain, Turkey, and the UK, and also at EU level (e.g., European Home Holiday Association). Undoubtedly, the process of professionalization of the STR market is fostering the emergence of quality standards and certification. The article maps different initiatives to provide some quality standards for STRs in some European countries, e.g., Quality in Tourism in the UK, and opens the debate about the need of external accreditations as opposed to the self-regulated nature of STRs via customers reviews (Cohen and Sundararajan, 2015; Gamito, 2016).

2. Literature review

2.1. The professionalization of the short-term rental market sector

A STR market is characterized by an online marketplace, which, over the last decade has enormously expanded (van Holm, 2020), providing price resilience of the properties (Shokoohyar et al., 2020). The STR market business model is surrounded by three key stakeholders: a provider, a user, and a platform (Tedds et al., 2021). Further to this, STR hosts are divided into single-listing hosts (e.g., a spare room or an apartment), also called individual or P2P hosts (Mahadevan, 2019), and multi-listing hosts or ‘multihosts’ who have two and more listings (Demir and Emekli, 2021; Dogru et al., 2020; Gil and Sequera, 2020). As observed by several authors (e.g., Demir and Emekli, 2021; Dogru et al., 2020) multi-listing hosts transform the sharing economy model, from consumer-to-consumer to business-to-customer. These multi-listing hosts are contributing to the professionalization of the STR market sector (Dogru et al., 2020; Wachsmuth and Weisler, 2018). Many of these multi-listing hosts are property management companies, defined by Picascia et al. (2017, p. 12) as ‘agencies listing third-party properties for STR’. Property management companies offer services such as user

profile management, booking aid, cleaning, and price optimization (e.g., Casamatta et al., 2022; Cocola-Gant et al., 2021) and full-scale property management (Stabrowski, 2017). Cocola-Gant et al. (2021, p. 2) label these types of intermediaries ‘corporate host’ and argue that they ‘have imitated practices and culture from the hotel industry’.

Existing literature on STRs sheds light on the changing dynamics of hosting due to the professionalization of the sector (e.g., Bosma, 2022; Casamatta et al., 2022; Cocola-Gant et al., 2021; Dugro et al., 2020; Giannoni et al., 2021; Wachsmuth and Weisler, 2018). Increasingly, STR hosts are adopting a multichannel distribution strategy. The study conducted by Giannoni et al. (2021) shows that 51% of hosts in Corsica are using Airbnb and at least one more online channel to advertise their properties. According to Casamatta et al. (2022), professional hosts differentiate from opportunistic hosts by their pricing strategy and market behaviours. For instance, the professional hosts offer even 20% higher pricing during the peak season, in contrast to the opportunistic hosts, due to their economic driven understanding about their business opportunities. Giannoni et al. (2021) argue that those hosts should be considered as professional competitors to the traditional hotel accommodation. In addition, according to Dugro et al. (2020), multi-listing hosts are typically more dynamic in managing inventory and providing more standardized accommodation experiences.

The process of professionalization of the STR market is concentrating revenues, perhaps, to more narrowed group of hosts (Cocola-Gant et al., 2021; Deboosere et al., 2019; Katsinas, 2021). According to Bosma (2022, p. 16), STRs produce an insecure income for those hosts who are not able to bring their own capital, whereas, only those hosts who are able to offer their own capital can generate ‘a more reliable income stream’. As Cocola-Gant et al. (2021, p. 2) pointed out ‘individual hosts will struggle to survive unless they professionalize themselves’. The study conducted by Dogru and colleagues (2020) shows that multi-listing hosts and hosts offering entire properties generate the majority of Airbnb’s revenues. In this context, policymakers must take into consideration the existence of a wide spectrum of host types within the STR market, as Tedds et al. (2021, p. 3) highlight, ‘from unsophisticated home-sharers to professional STR businesses’ rather than crafting regulations that categorise all STRs as commercial activity. For example, in some European cities there are some limitations for the P2P hosts in order not to be categorized as a professional, such as renting their properties for a maximum number of days per year (e.g., 120 days in Paris) (Gyódi, 2019), while in other cities such as Barcelona all hosts who either rent a room or an entire apartment for any period of time need to get a license and pay tax (Gencat, 2020).

2.2. Quality standards and certifications in the accommodation sector

While some studies reveal loyal consumer attitude towards STRs (Lalicic and Weismayer, 2018), other studies discuss negative STR experiences, e.g., dirty and poor room conditions, rude host treatment, and poor customer service (e.g., Sthapit et al., 2020). The major argument for negative STR experience is associated with quality standards of the STR industry. Birinci et al. (2018) point out that STRs offers non-standardised accommodation experiences in comparison with hotel accommodation. Likewise, Huang et al. (2020) discuss that guests are more likely to experience unpredictable and inconsistent service quality with Airbnb than in traditional accommodations. Property management companies, that often manage many properties on behalf of the owners, claim they can improve the quality standards, guest satisfaction, and revenue (Picasa, 2017). Quality standards and certifications based on the definitions provided by the International Organization for Standardization’s (ISO) play a key role in the tourism industry in general, and specially, in the accommodation sector (Casadesu et al., 2010; Huang et al., 2020; Slocum et al., 2020; Sthapit et al., 2020). The introduction of such standards aimed to ensure that different operators - e.g., tourism buyers, providers, and consumers - are able to make informed decisions thanks to the standardization of terms and specific

requirements of tourism services, destinations, facilities, and equipment (Casadesus et al., 2010; ISO, 2014; ISO, 2020).

Different countries have adopted specific norms and systems to regulate and standardize quality levels of accommodation services. For instance, Italy adopted the UNI/PdR 28:2017 to standardize additional value-added services of accommodation structures that are important to customers, but not mandatory by law (UNI, 2017). In the United Kingdom, *Quality in Tourism* (2019) (QT) introduced an up-to-date accreditation system for apartments safety, aiming at ensuring access to clean, safe, and legal accommodation. Objective factors utilized by QT for assuring and certificating STRs quality are safety, compliance, hospitality and welcome (e.g., by means of annual overnight assessment, advice, guidance, and support based on business reporting, stars rating and certificates, awards etc.) (*Quality in Tourism*, 2019). In Spain, quality standards - like UNE-ISO 21401:2019 and the Q Mark for Spanish Tourism Quality - are geared to perform audits of critical factors about the compliance with quality, safety, and professional service requirements within the accommodation industry (Álvarez-García et al., 2015; UNE, 2019).

Service quality attributes within STR accommodation platforms include host's behaviour and caring, property-related quality features, communication quality, guest's trust towards hosts as well as towards platforms, and transaction experience (Ju et al., 2019). To develop and maintain trust, an important aspect for successful operations of STR platforms, these platforms "have been integrating various reputation mechanisms, including online reviews and rating systems" (Načinović Braje et al., 2022, p. 163). Indeed, most STR platforms advocate that reviews and ratings are the best governance model to regulate the quality of their listings (Cohen and Sundararajan, 2015; Gamito, 2016). The need for quality certifications for STRs was perceived before the COVID-19 pandemic (Ert and Fleischer, 2019; *Quality in Tourism*, 2019) and is an ongoing issue within the STR market sector (Zhao et al., 2023). As Ert and Fleischer (2019) highlight, the need for quality assurance of STRs was recognized by Airbnb with the introduction of the "Superhost" badge back in 2014. Moreover, the definition and implementation of quality regulations and standards are important when it comes to STRs to minimize any negative effect or experience (Birinci et al., 2018; Huang et al., 2020; Slocum et al., 2020; Sthapit et al., 2020). Standards and regulations make guests feel more secure and protected against any unpleasant events. By increasing customer trust via quality standards and certifications, STR service providers may boost not only the tourism industry, but the competitiveness and development of the whole national economy (Slocum et al., 2020).

3. Methodology

This study adopted a qualitative research design (Flick, 2014) to explore quality standards within the STR industry and followed an inductive approach, which involves a bottom-up process of data analysis, where researchers start with specific observations or data points and then develop broader themes, patterns, or theories based on these observations (Creswell and Poth, 2018). The inductive research approach, as observed by Creswell and Poth (2018), is characterized by its flexibility, allowing researchers to explore new perspectives and generate insights directly from the data without imposing pre-existing theories or hypotheses. Inductive reasoning is particularly well-suited for qualitative research because it enables researchers to capture the complexity and richness of participants' experiences and perspectives. The paper is based on in-depth interviews with 36 experts who represented different stakeholders from the STR market industry in Croatia, Cyprus, Italy, Spain, Turkey, the UK, and with those who worked at EU level. A selection of European countries that heavily rely on tourism for their GDP, namely Croatia, Cyprus, Italy, Spain, and the UK were chosen for the study (Statista, 2022). Although less reliant on tourism for its economy, one of the most visited countries in the world is Turkey (World Population Review, 2022) representing an emerging market for

Table 1
Profile of the participants.

Country	Company / Institution	Position of the interviewee	Gender	Age
Croatia	Croatian Chamber of Commerce	Head of Short-Term Rental Association	Female	41–50
Croatia	Direct Booker (STR agency)	Owner	Male	31–40
Croatia	Eurotours villas (STR agency)	Owner	Male	41–50
Croatia	Institute for Tourism	Managing Director	Male	41–50
Croatia	Tourism Board Labin-Rabac	Head of Board	Female	61–70
Cyprus	Political party EDEK	MP	Male	51–60
Cyprus	Cyprus Tourism Organization (KOT)	Officer	Male	41–50
Cyprus	Political party 'DYSI' (leading party in Cyprus)	President	Male	51–60
Cyprus	Property management company	Owner	Female	31–40
Cyprus	Short-term accommodation association	President	Male	51–60
Italy	P2P Accommodation platform	Analyst	Male	21–30
Italy	STR accommodation association ABBAY (Veneto)	Vice-president	Female	41–50
Italy	Calabria Tourism Entity	Regional expert on tourism	Female	31–40
Italy	STR Accommodation company for students for the summer	Manager	Male	31–40
Italy	Sustainable tourism association	Vice-president	Female	41–50
Spain	Amficat (Catalan Hosts Association)	President	Female	51–60
Spain	APARTUR (STR apartment association in Barcelona)	President	Male	41–50
Spain	HiGuest (STR property management company in Barcelona)	Area Manager	Male	51–60
Spain	SimplyHosted (STR property management company in Cadiz)	Owner	Male	41–50
Spain	Spanish Association of Tourism Professionals	President	Male	61–70
Turkey	Aegean Tourist Business and Accommodation Association	Board member	Male	51–60
Turkey	Kirayaortak.com (Roomates and STR accommodation platform)	Owner	Male	21–30
Turkey	Missafir.com (STR property management company)	Owner	Male	31–40
Turkey	Tatildekiralama.com (STR accommodation platform)	Owner	Male	31–40
Turkey	Turkey Association of Tourism Travel Agencies	Board member	Male	61–70
UK	Association of Service Apartments (ASAP)	Chief executive	Male	41–50
UK	Dr in the House	Operations manager	Male	51–60
UK	Love Home Swap	Managing director	Female	41–50
UK	Quality in Tourism	Director	Female	41–50
UK	UnderTheDoormat/ Short-term Accommodation Association (STAA)	STAA Chairperson and Founder and CEO, Under The Doormat	Female	41–50
EU	Airbnb	EU Public policy managers	2 Females	31–40
EU	AirDNA	Founder	Male	41–50
EU	EHHA	Representative	Female	41–50
EU	Expedia/HomeAway	VP Government & Corporate Affairs EMEA - APAC - LATAM at Expedia Group	Male	41–50
EU	PriceLabs	Analyst	Male	31–40
EU	Integrated Property Management Company	Senior manager	Male	51–60

short-term rentals. Therefore, we decided to include Turkey in the study as well because of its volume within the European short-term rental market. The fieldwork took place between May and June 2020 coinciding with the first wave of the COVID-19 pandemic. All interviews were conducted online via Zoom, Skype, or Google Meet, as the result the pandemic related measures that prevented travel and/or face-to-face interaction (Salmons, 2012). The research presented in this article was part of a larger project by a cross-national team of researchers focusing on the collaborative economy in Europe. The interview protocol was organised around five blocks of questions included the following topics:

(1) STR market characteristics in the participants' country or at EU level; (2) types of hosts; (3) the COVID-19 pandemic's impacts on the STR market; (4) STR policies during COVID-19; and (5) the new trends in the STR industry. In particular, this paper focuses on questions from blocks 1, 2 and 5.

Semi-structured expert interviews were used as the main method of data collection which is deemed particularly suitable for under-researched and fast-changing context (Bogner et al., 2009). Participants (see Table 1) were recruited using purposive sampling (Sharma, 2017) and included tourism experts, policymakers, STR accommodation associations representatives, tourism board officials, STR property management company managers, and STR platform representatives. The researchers from each country aimed to reach a diverse sample in terms of the organisational profile of the experts and their level of seniority following the principle of saturation (Glaser and Strauss, 2017). It must be emphasized that private hosts were not directly targeted with this research but were represented through STR associations. The level of expertise was established through the evaluation of professional activity, such as participating in forums and professional conferences as well as through the membership in a professional body, such as the European Holiday Home Association (EHHA). Both LinkedIn and professional connections were used for recruiting participants.

As for the sample representativity and the replicability of the findings, we ensured the presence of both male and female interviewees as well as all age bands (see Table 1), but all the methodological contributions in literature recommend that the quantitative-born concepts and measures of sample representativity and validity are not applicable to the expert/elite interviews, given their qualitative nature (Littig, 2009; Stenbacka, 2001; Meuser and Nagel, 2005). Moreover, the lack of both a preliminary definition of the "elite" (or "expert") profile as well as of the "formal guidance or indication" for choosing a representative and valid "pool of experts" is an additional obstacle "in a variety of economic sectors and countries, as well as from the social sciences literature on elites" (Harvey, 2011, p. 431; see also Zuckerman, 1972; Lukes, 2005), including the tourism sector (Hall, 2011). This is even more true for income data, considering the reluctant behaviour of many interviewees towards "one of the questions [...] found awkward asking elite members [that] is their annual salary because in many cultural contexts this is still considered a very private question" (Harvey, 2011, p. 437). Hence, we did not disclose any information about income. This choice is fully coherent with both methodological and sector-specific literature that do not include income among the significant factors in elite interviews (Harvey, 2011; Littig, 2009; Smith, 2006; McDowell, 1998; Parry, 1998; Woods, 1998; Richards, 1996; Burt, 1992; Zuckerman, 1972), especially in the tourism and hospitality literature (Miguel et al., 2022b; Amore and Hall, 2021; Gross et al., 2017; Darbi and Hall, 2014; Wood and Jayawardena, 2003; Jayawardena, 2003; Jayawardena, 2002).

Expert interviews are effective in obtaining unique expertise in a quickest way (Bogner et al., 2009). The interviews were semi-structured thus enabling certain level of flexibility and freedom while keeping the focus around the research questions. On average, the interviews lasted around one hour. The interviews in the UK and at EU level were conducted in English and the rest of the interviews were conducted in the local language of research participants, and later translated to English for the subsequent thematic analysis. Transcription is at the heart of qualitative research (Hennik & Weber, 2013), and therefore, it is essential to accurately translate interviews from the original language (Twinn, 1997). The cross-national researchers' team are proficient in both languages, the source language (i.e., Croatian, Greek, Italian, Spanish and Turkish) and the target language (i.e., English), which ensured the quality of the translations (Al-Amer et al., 2015).

The transcribed interviews were analysed using thematic analysis, in accordance with the guidelines of Braun and Clarke (2006): familiarization, coding, generating themes, reviewing themes, defining, and naming themes, and writing up. Based on the framework developed by Braun and Clarke (2006), the first step was to transcribe, read, and

re-read all the interviews in order to become familiar with the data. Second, one researcher defined codes to initiate the coding process (ibid.). Coding involves creating different categories that can be referred to as tags or labels. The codes are usually assigned to specific sentences or whole paragraphs. Following the inductive approach (Creswell and Poth, 2018), codes were generated from the data itself to allow patterns and themes to emerge from the interview data. This approach is exploratory and data-driven and allowed the researchers to remain open to new themes that could emerge from the data. The identification, moderation and definition of the themes were divided between two different researchers (Burla et al., 2008). During the first stage of the analysis the first-level codes were identified within the interviews using the software NVIVO (Sotiriadou et al., 2014; Woods et al., 2016), which were then moderated and developed into common themes. As Braun and Clark (2006) observe, reviewing and defining themes is an important step in the thematic analysis process, since it allows data to be refined to write findings. Six themes were identified during the analysis process: Conceptualising Peer-to-peer Accommodation, Types of hosts (covered in subsection 4.1.), Quality standards, Quality certifications, Review and rating systems (covered in subsection 4.2.), and Issues with quality standards and certifications (covered in subsection 4.3.). Afterwards, data reduction was conducted to shorten the data to a manageable size. Finally, the main themes were cross-referenced with quotations from the interviews during the writing up step.

The project received ethical approval from Leeds Beckett University. The consent form and the participant information document were sent to all participants prior to the interviews and confidentiality was ensured through anonymization (Surmiak, 2018) and data protection (Wiles et al., 2008). The participants were offered different options concerning the anonymization of personal information (Surmiak, 2018). In most cases, the experts chose to reveal their real names apart from several exceptions (Hammersley and Traianou, 2012). For instance, two participants did not allow to mention the name of the company, while one participant did not allow to reproduce direct quotes. Nevertheless, the study analysis only refers to the specific position of the expert within the company or only generic profile of the company is used in cases where the experts chose to stay anonymous.

4. Discussion

4.1. Mapping the boundaries between P2P and professional hosts

The success of Airbnb transformed STR platforms' business model originally created to facilitate P2P exchanges, and, at the same time, fostered that on-line travel agents and accommodation brokers such as Booking.com entered the P2P accommodation sector (Adamiak, 2019; Načinović Braje et al., 2022). The increased professionalization of the STR market sector has been discussed by different authors (e.g., Coca-Gant et al., 2021; Dogru et al., 2020). In fact, in the context of accommodation, the issue of profit orientation has been recognized among most contradictory aspects of sharing economy (Kuhzady et al., 2020). In the interview several stakeholders commented about this topic. As AirDNA founder put it:

"I think it's been an evolution of what was P2P sharing, where there's been this natural evolution of what started as P2P became really a commercial activity at some point in time. (...) Airbnb, you know, was at one point 100% P2P, and every year it gets a little bit less so" (AirDNA, founder, EU level).

Despite the literature conveying a tendency for further professionalization in the STR industry (Adamiak, 2019), our study identified a shift towards a state of co-existence between private/ nonprofessional and professional hosts. According to our findings, in most countries there are prevailing private hosts in the STR market (PriceLabs Analyst). For example, some stakeholders estimate that in the UK and Italy 60–70% of the total STR market is run by private hosts (Quality in

Tourism, CEO, UK; STAA chair, STR accommodation association, UK; Regional expert on tourism, Italy), while others estimate that in Spain and Italy private hosts are 80% of the market (Simply Hosted manager, STR property management company, Spain; Host association, president, Italy). Nevertheless, the Regional Expert on tourism from Italy disagreed and claimed that the professional quota in Italy is 50%. In the same vein, data provided by HomeAway/Expedia shows the STR platform has 50/50 or 60/40 split of professional vs private hosts in Europe, depending upon the country. On average, according to HomeAway/Expedia, the split of private and professional hosts in the selected countries is around 65/35. Our findings follow [Adamiak's \(2019\)](#) research results, who found that 41,5% of Airbnb listings belong to multi-host, where such listings can be P2P (private owner) or professionally managed.

Following EU Consumer Protection Cooperation regulations (European Commission, 2018) and different protection offered for users of individual and professional providers, the distinction between a private or a professional host was formally recognized by EU legislation in 2018. Consequentially, some platforms explained how they request the hosts to identify themselves as either professionals or private. Airbnb implemented the distinction between private and professional hosts in 2018, while hosts at Booking.com are required to clearly indicate whether an accommodation is offered by a private host or a professional since 2019 ([Rental Scale-up, 2020](#)). Airbnb revealed that they have a system called 'the professional host framework' which hosts must fill in before putting a property on the platform, and they highlighted that they are 'basing a lot of this on self-declaration' (Airbnb, Public Policy manager, EU level).

While the co-existence of private (nonprofessional) and professional hosts (corporate owners or property management companies) within the STR industry has been documented by previous work ([Adamiak, 2019](#); [Cocola-Gant et al., 2021](#); [Prayag et al., 2018](#)), there is still much ambiguity on what distinguishes nonprofessional and professional hosts ([Abrate et al., 2022](#)). Existing literature separates nonprofessional from professional hosts largely on the merits of the number of listings; professional hosts manage multiple listings as opposed to the individual listings of nonprofessional or private hosts ([Abrate et al., 2022](#); [Deboosere et al., 2019](#)). Yet, it is increasingly understood that this distinction may be the tip of the iceberg and there is much to unveil at the boundaries between nonprofessional from professional hosts. [Xie et al. \(2021, p. 413\)](#) include among professional hosts multi-listing hosts as well as private hosts that rent full-time "for the full length of a month (e.g., 30 days or more) or year (e.g., 360 days or more)". However, they also label non-professional hosts to single-listing host, which complicates their definition of professional vs non-professional host. [Xie et al. \(2021\)](#) also identify a part-time host who would rent their properties for less than the full length of a month or year. On the other hand, [Adamiak, \(2019\)](#) pointed out that multi-listing hosts can be either non-professional hosts (private owners) or professional hosts (corporate owners or property management companies).

STAA chair describes very well the complex configuration of the STR market, where there is a part which is P2P and other actors are professionals:

"There's P2P (P2P you normally have the host who is actually the person welcoming the guests directly), and there is, within short-term accommodation, service apartments, the professionals, the professionally managed STRs (where an owner might contract out with a company to do that management). (...) Also, traditional holiday homes providers" (STAA – Short term accommodation association, chair, UK).

PriceLabs, a service provider to the STR market label all types of hosts as 'usual business': "We just described them as the scale of business, whether it's someone running a shared bedroom as a business, versus someone running few hundred properties as a business" (PriceLabs, analyst, EU level). The findings give a sense of the absence of the 'P2P' or 'sharing' aspects from the way that professional providers are

understanding and defining their activities. For instance, the representative of APARTUR (STR accommodation association, Spain) indicated: "We are not Sharing Economy. (...) renting entire apartments in a professional way as a business we don't consider that there is any collaboration element here. It is an accommodation sector like others". The president of the Spanish Association of Tourism professionals was even more critical: "Labelling sharing tourism or sharing accommodation, an activity that is purely economic 99%, it is a language trick, it is a marketing strategy to sell it to customers, at the end of the day we are talking about exchange of a service for a price, we are talking about economy" (Spanish Association of Tourism Professionals, President, Spain). This claim is in line with [Hawliczek et al.'s \(2018\)](#) study on sharewashing in the STR industry which highlights that STR platforms mislead consumers by purposely emphasizing an image of social and ecological principles while the platform's business model is actually centred around profits.

4.2. Quality assurance in STRs

Quality assurance in the STR industry is currently ensured by different stakeholders such as property management companies, STR platforms or public and private accreditation bodies. For example, property management companies, who have their own quality standards to select a property, often visit the properties before adding them to their portfolio. Small STR platforms like Doctor in the house or TatildeKiralala also visit the accommodations before accepting the owners as hosts. For example:

"We have almost 1000 business partners from Turkey's most popular holiday resorts and villas and 3000 villas and boats available for guests. All boats and villas have been visited and seen before rental process" (TatildeKiralala, STR platform, Turkey).

Quality standards inspected by property managers, according to interviews from different countries, may include location, new furniture, new bedding, Internet connection, safety and security and other important elements. Among these, safety and security issues have been found to restrain the use of STR (e.g. [Tussyadiah and Pesonen, 2018](#)), which has been recognized by industry practitioners: "For me the most important thing is that each of our properties has to go through all important health & safety checks before any guests will come to stay in" (Property management company, manager, Cyprus). Furthermore, a private third-party health & safety certification in STRs have evolved, as for example CertiStay ([Stevens, 2019](#)). This private initiative for property auditing and certification is based on regulatory requirements and industry best practices and standards, and it is intended to be used by owners and property managers. In addition to rental safety, location and neighbourhood safety can also restrain the use of STR ([Lim et al., 2020](#); [Slocum et al., 2020](#)), which is also recognized by property managers. STR platform 'Doctor in the House' mentioned to decline many hosting requests because they wanted to maintain high quality standards in terms of comfort of the doctors but also in terms of safety of the neighbourhood and the agreeability of the host: "what we want from the host is that they're friendly and polite, and kind, and we just want to get a sort of good feel for them" (Doctor in the House, STR platform, UK). The hosts behaviour as an important aspect for the P2P accommodation service quality has also been previously documented by several studies (e.g., [Ju et al., 2019](#); [Zhang et al., 2018](#)).

However, the extent of platform involvement in the quality assurance depends upon its size, as large STR platforms illustrate a different process. Global STR platforms such as Airbnb, HomeAway, or LoveHomeSwap mentioned that they did not have any specific quality standards to list or remove properties from their platforms. Additionally, each platform constructs different narratives regarding quality assurance. Interestingly, in the case of home-exchange, LoveHomeSwap representative claimed that the platforms naturally self-regulate themselves "in the sense of the quality of homes and the types of homes" since potential hosts "would typically go in and view all their listings in their

area and they would very quickly gauge as to whether they had the right kind of property or not". Nevertheless, both Airbnb and HomeAway reported to investigate properties with low reviews, confirming the role of reviews as a control quality tool (Cohen and Sundararajan, 2015; Gamito, 2016). As argued by the Airbnb representative:

"Reviews are really important part of determining quality of our hosts. (...) If there is a reason that these reviews are so low, and they've been properly investigated by customer service, then Airbnb will follow up and remove those listings so there is that degree of control certainly" (Airbnb Public Policy manager, EU level).

Likewise, AirDNA claimed that Airbnb ratings and reviews were "very trustworthy" because "if somebody has 100 reviews and a five star, absolute five stars review on cleanliness, you can be pretty certain that's a really clean, well-maintained property". Research thus confirms previous findings that both quantity and quality of reviews matter in the STR market and that reviews can help platforms to increase the quality of services offered (von Helversen et al., 2018; Lee et al., 2020). Consumers look at review scores and read reviews when they compare rentals of similar value and comfort (von Helversen et al., 2018). Gamito (2016) argues that large STR platforms are aware that rating and reviews are the best way of regulating the quality of the STR offering and deem self-regulation as the ideal governance model for this activity. As the Head of Croatian Institute for Tourism stated: "Technology brings transparency because it is found out very quickly if something is wrong". In fact, the verified review system can be seen as a form of self-regulation to reduce information asymmetries between hosts and guests. However, there are several other issues where platforms' self-regulation could contribute: removing illegal listings, disclosing information for collecting taxes, following local laws on housing, etc. (Cox and Haar, 2020). To yield best results, such forms of self-regulation should be joint implemented by most platforms, as was the case with verified review system (see Cusumano et al., 2021).

In addition to review system, formal STRs accreditation schemes have recently mushroomed in different countries so "any individual host or any company who operates in the STR sector can get accredited" (STAA, short-term accommodation association, UK). At the national level, countries like Croatia and the UK have started to create accreditation programs to provide some quality standards for the STR market industry. The Tourist Board representative from Croatia reported that in the region of Istria they have created the 'Domus Bonus certificate for quality' as "an attempt to guarantee uniformity of accommodation quality at the level of Istria County", but she also complained that "large digital platforms do not even take it into consideration", confirming the great importance of reviews on digital platforms (Cusumano et al., 2021). In the UK, there is the accreditation standard for STRs called 'Quality in Tourism', which is like a third-party verification as well as an International Service Apartment accreditation programme. The ASAP (Association of Service Apartments) representative for the UK explained that it is mandatory for ASAP members to get a quality accreditation "which focus on the code of conduct and also health & safety measures".

External accreditation schemes usually request higher quality standards than the minimum ones requested by national or local authorities to operate in the STR market (Hajibaba and Dolnicar, 2018; von Briel and Dolnicar, 2020). For example, in the UK the insurance is not a mandatory requirement to operate in the STR market. Nevertheless, to get the 'Quality in Tourism' accreditation, STRs need to have a gas certificate, carbon monoxide detectors, and an insurance. Professional STR associations (STAA chair, STR accommodation association, UK) showed a positive view of such accreditation scheme despite the fact it creates direct costs for hosts (£100 a year). The Director of 'Quality in Tourism' explained that the percentage of STRs who have this accreditation in the UK was tiny (less than 1%). Generally, although there are already accreditation schemes in some countries, it seems its implementation is still in its infancy, so main challenges that prevent the expansion of the quality assurance and certification programs need further exploration.

4.3. Challenges associated with quality standards and certifications

The main issue with quality assurance within the STR industry is the lack of any official, broadly accepted, quality standards for STRs. As an integrated property management company at EU level put it: "In the P2P accommodation world, at least at what I'm seeing now with many individual owners, there are no strict rules, there are no like basic minimum requirements. So, theoretically, we could say that anything could fit". However, in some cases, standardization can improve customer experience (Zhang et al., 2023). For example, the COVID-19 pandemic has fostered the appetite for STRs being certified because consumers were looking for just that: "because of the current pandemic I think that I just identified this massive hole in the market" (Director of Quality in Tourism, UK). These statements are in line with extant literature that recognizes a key role of quality standards and certifications in the accommodation sector (e.g., Birinci et al., 2018; Sthapit et al., 2020; Huang et al., 2020; Slocum et al., 2020).

As many countries have implemented hotel grading schemes based on stars ratings, possibly STR could benefit from similar stars rating system, especially to overcome the issue of lack of trust associated with STR (Martin-Fuentes et al., 2018). Such a rating system is already applied to STRs in the UK or Croatia. In the UK, Quality in Tourism (2019) considers objective factors in their accreditation system: safety, compliance, hospitality and welcome to award different stars. Similar objects are evaluated within the Q Mark for Spanish Tourism Quality (Álvarez-García et al., 2015; UNE, 2019). Nevertheless, some stakeholders recognised that this stars system was problematic as there were inconsistencies with the quality standards. For example:

"Accommodation stars system represent one way of evaluating the quality of accommodation, but there is a problem of inconsistency of the criteria for evaluating the accommodation quality and stars awarding at the broader level because different countries have different evaluation criteria, which means that a 3-star accommodation in Croatia is not the same quality as the one in Italy, for example. In addition, some countries such as Portugal do not even award stars for private accommodation, which is an additional problem because it prevents the comparison of the accommodation of the same type" (Short term accommodation association, Croatia).

Stars rating system for STR should be carefully modelled, to correspond with STR user preferences like value for money, cleanness, location and other (Martin-Fuentes et al., 2018). Interviewees observed that the accommodation stars system was losing its importance in favour of reviews on digital platforms as platforms have gained so much influence that they have begun to guide the policies in tourism towards self-regulation as pointed out by some scholars (e.g., Cohen and Sundararajan, 2015; Gamito, 2016). Despite claims for self-regulation being an ideal governance model for the STR market discussed in the previous section, the main reason why regulation is needed and why this sector cannot be regulated only by the market itself is that the protection of consumer must be assured (Stemler, 2016). The question of the reviews is also doubtful since there are a lot of cases with false reviews either good or bad which cannot be controlled. Quality in Tourism director blamed big STR platforms for not being supportive of Quality schemes: "very few have picked it up and I think that's mainly because the OTAs and the Airbnbs of this world have not been supportive". It seems the big STR platforms push for self-regulation clashes with external quality assurance initiatives. However, as opposed to Airbnb and Booking.com, HomeAway/Expedia representative explained that they recommend British hosts to display the 'Quality in Tourism' accreditation.

In order to assure the certain quality standard achievement regulation is needed. Quality assurance differ from country to country. This can be explained by the diverse STR market regulations among cities and countries (Hajibaba and Dolnicar, 2018; von Briel and Dolnicar, 2020), impact of different socio-economic conditions of cities, and the attitudes of the management companies and private hosts (e.g., Ju et al., 2019;

Zhang et al., 2018). While some national and local governments apply strong measures to regulate STR market, others have either light or no regulatory approaches for quality assurance in the STR market.

5. Conclusions

5.1. Practical implications

This work claims a twofold originality and provides practical implications for the main categories of stakeholders identified by Tedds et al. (2021): providers/hosts, guests/customers, and platforms. In addition, implications for another stakeholder category (i.e., policymakers) are discussed. First, it fills a gap in literature by investigating the hitherto unexplored need to harmonize and implement quality standards in the STR market. In fact, despite an escalating interest in the increasingly growing and professionalized offer by some types of hosts (Adamiaak, 2019), other host categories like the P2P one are not experiencing the same growth rate, partly due to the complex application of professionalization practices (Dugro et al., 2020; Cocola-Gant et al., 2021) and locally different and mandatory quality-related requirements (Mahadevan, 2019). As a result, we found that STR market is increasingly being professionalized and strongly differs from the basic idea of peer-to-peer transactions (e.g., Deboosere et al., 2019; Dugro et al., 2020; Katsinas, 2021; Načinović Braje et al., 2022). The study highlights that the distinction between professional hosts (corporate) and private hosts should be taken into consideration by the policymakers rather than regulating all STRs with the same regulation (Gyódi, 2019; Tedds et al., 2021). In fact, the development of regulations on the STR industry is still ongoing and currently characterized by some limitations due to the ineffective policymakers' activity.

In general, such a category of stakeholders does not account for the many and relevant differences in terms of host types, and does not even provide clear and universal definitory criteria to distinguish among P2P and professional accommodation services in STR platforms (Adamiaak, 2019; Načinović Braje et al., 2022; Cocola-Gant et al., 2021). Instead, policymakers craft regulations that should only apply to commercial businesses operating in the STR industry (Tedds et al., 2021). Also, many platforms adopt self-declarations from the hosts to assign them to host categories (based on an Airbnb, Public Policy manager, EU level). Such limitations could be partly explained by the lack of an exact and shared definition for the construct of professionals operating in the STR market vs peer stakeholders operating within the canons of the sharing economy (Gyódi, 2019; Dogru et al., 2020; Cocola-Gant et al., 2021). Hence, this paper has some implications for policymakers, as it helps informing them about the need of: (a) establishing a set of criteria to identify and understand better the different categories of STR hosts (e.g., P2P vs professional, single-listing vs multi-listings); (b) designing and implementing ad hoc measures devoted to each category of host and the corresponding accommodation services (ISO, 2014). For instance, by making a distinction between P2P and professional accommodations, different rules, laws, standards and fiscal measures could apply in order to attribute quality accreditations, official licenses for the accommodations, and taxation levels (Gencat, 2020). A certain "badge" could be created as a visible sign of the differentiation between professional and P2P hosts. This obligation should be guaranteed by the platform.

In addition, hosts' behaviour may change according to their category: professional hosts have a 20% higher price than opportunistic hosts in peak season, substantially mimicking the hotel industry, and are more inclined to adopt industry standards and third-party certifications (Casamatta et al., 2022; Giannoni et al., 2021; Dugro et al., 2020). Therefore, policymakers should adapt their measures according to each specific category of host, for instance, by designing incentives geared to opportunistic hosts, that are less sensible towards the adoption of quality certifications and standards. Moreover, policymakers should ensure that P2P hosts would be guided into the professionalization path by means of national or local regulations, ensuring the annual overnight assessment

and guidance by third-party quality certification bodies, instead of relying on self-regulated accreditations. In fact, as a further element of originality, this work clearly points out how the need of a standardized third-party certification in the context of STRs in Europe in order to provide customer-centric ratings and reviews on rental platforms with the key role to assure quality, boost STR businesses and the whole national economy. In turn, supporting hosts to achieve third-party certifications and incentives would lower some entry barriers (e.g., complexity of procedures, inconvenience and operational inefficacy) and generate a boost involving not only the tourism industry, but the competitiveness and development at the country level (Slocum et al., 2020).

The process of professionalization has also managerial implications for the hosts. First, the adoption of tailored standards and rules could favour the survival and development of STR businesses, especially those based on multi-listings, that are less flexible and more exposed to crises (e.g., COVID-19) (Dolnicar and Zare, 2020; Gerwe, 2021; Deboosere et al., 2019; Katsinas, 2021). Hence, in an organizational perspective, multi-listing hosts like property management companies should facilitate the implementation of standards and quality accreditations for their accommodations, as these are drivers for guest satisfaction, loyalty, and revenue growth, while increasing at the same time the price resilience of the property (Shokoohyar et al., 2020; Picasa, 2017; Lalicic and Weismayer, 2018). Yet, as tourists are generally seeking for authentic and unique experiences (e.g. Načinović Braje et al., 2022; Akarsu et al., 2020), although some standards are desirable, excessive standardization could reduce authenticity as it inhibits choice for guests, negatively affects guest experience, and hinders adaptation to customer demands (Zhang et al., 2023). Second, the professionalization supports especially P2P accommodation providers to perform informed decision-making processes (e.g., about the requirements of accommodation services, facilities, equipment) and empower themselves through the exploitation of revenue-generating existing assets (ISO, 2014; ISO, 2020; Barcelona City Council, n.d.c.; Deloitte, 2019; Von Briel and Dolnicar, 2020; Cocola-Gant et al., 2021; Hajibaba and Dolnicar, 2018).

From the guests' and platforms' perspectives, practical implications may vary according to the national and local regulations adopted in the socio-economic contexts at hand (Hajibaba and Dolnicar, 2018; von Briel and Dolnicar, 2020). Such differences pose a general issue related to the difficulty of comparison of accommodations located in different countries, as the star rating system may be either missing or working in different ways. For this reason, the stars system was losing importance and being replaced by the reviews in digital platforms. However, reviews pose further challenges to both platforms and guests, as not all of the platforms provide verified reviews, hence, decisions made by guests, based on fake comments, may lead to negative customer experiences. Therefore, the main favourable implication for guests and platforms relates to customer protection, that must be assured by the platform itself through a combination of verified reviews and technological solutions (e.g., algorithms, reputation management), that bring transparency and reduce those information asymmetries or shrewashing initiatives that typically hinder the guest experience (Hawllitschek et al., 2018; Cohen and Sundararajan, 2015; Gamito, 2016; Stemler, 2016). Moreover, not only verified reviews and algorithms, but also an overall governance model managed by the platform and third-party organizations may regulate the quality of the listings and, in turn, help guests to reduce negative experiences (e.g., by removing illegal listings, disclosing data for tax collection, classifying host type without relying on self-declarations, reducing unpredictable and inconsistent service quality), while increasing the perception of customer protection, guest trust towards STRs at large (e.g., hosts and platforms) and transaction experiences (Sthapit et al., 2020; Cox and Haar, 2020; Huang et al., 2020; Slocum et al., 2020).

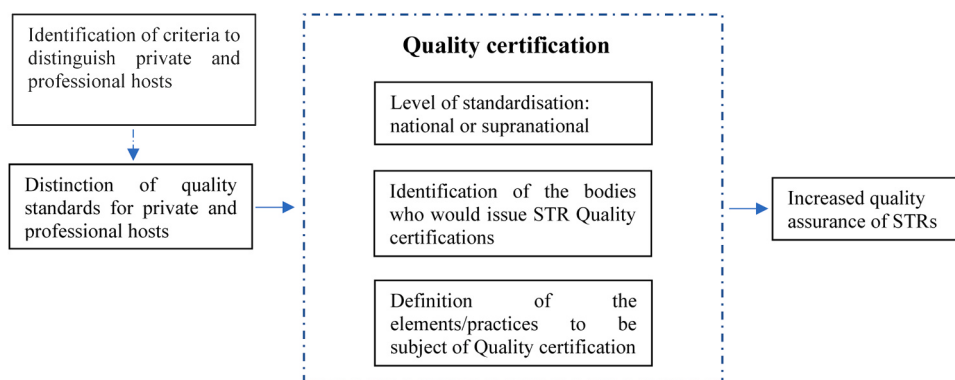


Fig. 1. Process of implementation of quality standards in the STR market.

5.2. Theoretical implications

This work addresses the identification of the implementation process of quality standards within the STR industry (Fig. 1).

As a general remark, Fig. 1 reports about the nature of quality certification and the two possible ways for obtaining it for STRs, namely, self-regulated (via online customers' reviews or on-site visits) and external ones. The latter typology can be issued by either governmental or private institutions (representative from Tourist Board from Croatia; Director of Quality in Tourism; Casadesu et al., 2010; Álvarez-García et al., 2015; UNE, 2019). In both cases, irrespective of the nature of the issuers, the implementation process of quality standards can be based on either a local (e.g., urban, regional, national) or a supranational (EU, international) standardization level. However, when setting the norms, rules and requirements mandatory by law, policy-makers usually fail in terms of targeting the existing quality accreditation. In fact, policies consider all hosts as commercial actors (Tedds et al., 2021), and policies are developed correspondingly, with scarce/no consideration of the relevant quota of private/P2P hosts that follow the collaborative principles of the sharing economy (Gyódi, 2019; HomeAway/Expedia representative; Demir and Emekli, 2021). The difference between regulation and certifications imposed by authorities and voluntary certifications has to be emphasized. In that context it must be underlined that the certification is easier to obtain especially having in mind its effectiveness and relatively fast procedure compared to policy creation which is often inefficient and slow.

In addition, a "comparability issue" arise depending on whether the external body issuing the quality certification is a governmental or a private one, as suggested by the interviewee from a short-term accommodation association in Croatia. In fact, if the issuing body is linked to national governments, the result would be a comparable arena of accommodations at the country level, but no comparison would be possible among STRs located in different countries, as the criteria would be different. This would depict a sort of fragmented scenario at the EU level. The scenario would be even more fragmented if the certification system has local or regional basis and criteria. On the contrary, if the certification comes from private institutions, the comparison would be possible also among different countries, provided that the issuing private body is widespread in the STR industry. Private issuers have a higher awareness of the target market for their quality certifications, and target them much better (Gyódi, 2019; Tedds et al., 2021). Fig. 1 proposes a detailed list of objects, practices, and criteria that are identified by already existing STR quality certifications and the interviewed experts. All of them make part of the proposed STR Professional Accreditation process. Finally, based on such a list of objects, practices and criteria, we propose a formal definition of STR Professional Accreditation as 'the third-party-issued quality certification for professional hosts that operate in the STR market as commercial actors, assuring that high quality standards are offered in terms of facilities and location, property

structure and equipment, health, safety and security protection, hosts' behaviour, guests' trust, circularity and sustainability'.

5.3. Limitations and further research directions

This study has some limitations. First, the data was collected during the first wave of the COVID-19 pandemic (between May and June 2020), therefore, the period in which data collection took place may have influenced the findings. Second, although individual hosts were partly represented by STR accommodation associations, the study did not include individual hosts, only professional ones. Individual hosts may have more concerns about implementing quality standards in their hosting activity than companies. Nevertheless, this study does not shed light on individual hosts and their perception of competition from certified listings if they have quality certification. Therefore, future studies could focus on experiences of individual hosts compared to their professional competitors in terms of quality assurance. Furthermore, it would be interesting to conduct an ethnographic study explaining a dynamic process of individual hosts' journey while implementing quality standards within their hosting activities. Third, the detail of the accreditation schemes was not analysed in depth. Future research could analyse the requirements that are needed to receive a STR quality accreditation from different accreditation bodies. Also, future studies could explore the implementation of an accreditation scheme in one given country, e.g., Quality in Tourism in the UK. With the ongoing professionalization of the STR market sector, it seems it is only a matter of time that professional practices and standardisation of the quality of the STR accommodation service is implemented worldwide. The question is how these quality standards should be implemented and which organisms would take care of this task.

CRediT authorship contribution statement

Berna Kirkulak-Uludag: Funding acquisition, Investigation, Writing – original draft, Writing – review & editing. **Kosjenka Dumančić:** Data curation, Funding acquisition, Investigation, Writing – original draft. **Maria Hadjielia Drotarova:** Data curation, Formal analysis, Investigation, Methodology, Writing – original draft, Writing – review & editing. **Ivana Načinović Braje:** Data curation, Funding acquisition, Investigation, Writing – original draft, Writing – review & editing. **Cristina Miguel:** Conceptualization, Data curation, Formal analysis, Funding acquisition, Investigation, Methodology, Project administration, Software, Supervision, Writing – original draft, Writing – review & editing. **Carlo Giglio:** Data curation, Funding acquisition, Investigation, Writing – original draft, Writing – review & editing.

Declaration of Competing Interest

None

Acknowledgements

The study was funded by the Higher Education Curricula Development on the Collaborative Economy in Europe (COLECO) Grant Agreement Number: 2019-1-UK01-KA201-062118 Funder: Erasmus + Key Action 2 Strategic Partnerships for Higher Education.

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