Survey Results
Power in the Sharing Economy: European Perspectives

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Executive Summary

Peer-to-Peer Relationships

- Users of the sharing economy report moderate levels of emotional labor.
- Consumers perceive themselves as receiving better interpersonal treatment than providers.
- Sharing economy consumers have high expectations of professionalism from providers.
- The majority of participants do not want the rating/review system to be removed.
- However, almost one in five consumers think that consumers should not be rated/reviewed.

Peer-to-Platform Relationships

- Sharing economy users have low expectations that platforms would take action to correct their concerns.
- Almost a third of users are hesitant to question a sharing platform's policies.
- Less than half of all users think that sharing platforms' pricing policies are fair.
- European users agree that platforms take too much money from each transaction.
- Almost a third of all providers feel pressured to provide more often than they would like.

Platform-to-Society Relationships

- More than a third of all providers use online communities to connect with other providers.
- Non-users are more supportive of provider unionization than users.
- A large majority of respondents think that sharing platforms should follow the same rules and regulations as established companies.
- Respondents want some regulation but not a complete ban.

1 Introduction: Power and the Sharing Economy

User perceptions and concerns

Overview of the Report

Power Dynamics

Peer-to-Peer Relationships	**Peer-to-Platform Relationships**	**Platform-to-Society Relationships**
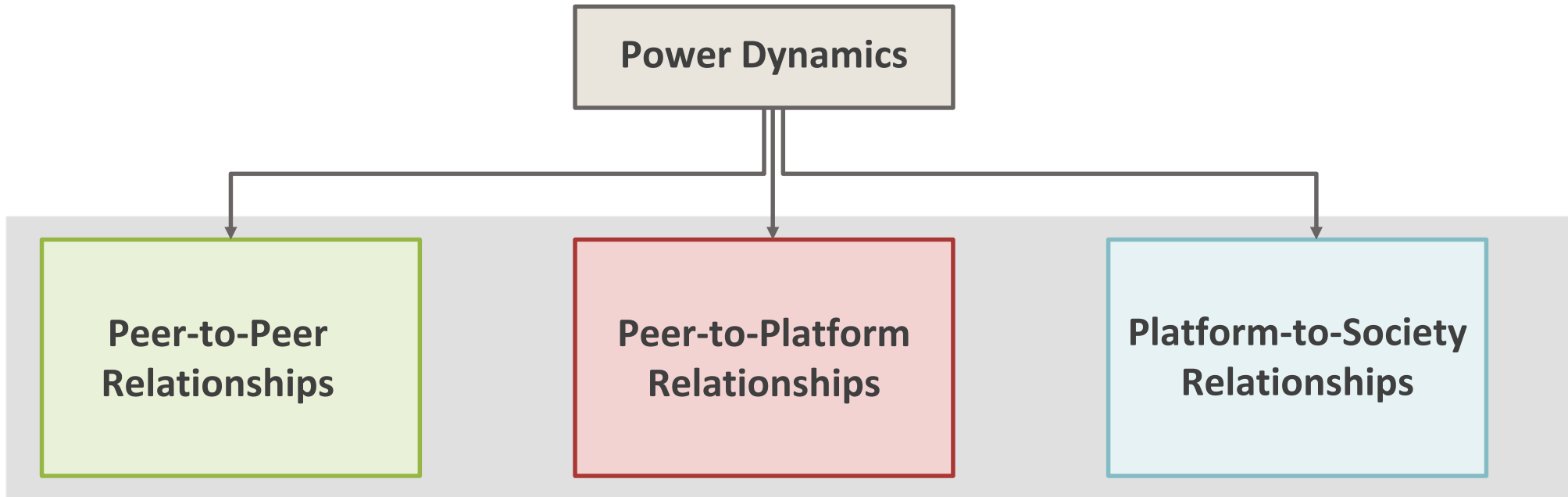
The growth of commercial sharing platforms, the breadth of their economic and social impact, and the conflicting interests among stakeholders have brought to light underlying tensions in the perceived **power-balance** between platforms, providers, and consumers. In the three sections of this presentation, we address peer-to-peer relationships, peer-to-platform relationships, and the platform-to-society relationships.

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2 Emotional Labor in the Sharing Economy

Self-conscious emotional regulation among providers and consumers during a sharing transaction

Emotional Labor

Sharing with strangers often necessitates human interaction. However, the 'service layer' of certain platforms demands emotional regulation akin to traditional service industries. Are providers, and even consumers, forced to put on a friendly face?

Emotional Labor: Sharing Economy users present high levels of emotional labor during transactions.

83.6%
of users usually **express* friendly emotions** during a sharing transaction.

63.2%
of users usually **hide* their annoyance about** something during a sharing transaction.

62.7%
of users usually **hide* their disapproval about** something during a sharing transaction.

*Percentage of providers/consumers who selected "About half the time", "Most of the time", or "Always"

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Consumers perform **more emotional labor** than providers.

The largest differences between consumers and providers are in
expressing positive emotions

	Express feelings of sympathy (e.g., saying you are sorry to hear about something, saying you understand).	Express friendly emotions (e.g., smiling, giving compliments, making small talk).	Hide your disapproval about something someone has done.	Hide your annoyance about something someone has done.
Providers	3.1	3.38	2.77	2.74
Consumers	3.2	3.48	2.78	2.83

□ Providers □ Consumers

N = 1699 Consumers and Providers: 556 Providers and 1143 Consumers; Arithmetic means for each item are displayed. 1-5 scale with 1-never, 2-sometimes, 3-about half the time, 4-most of the time, 5-always

Women perform **more emotional labor** than men.

3.24

3.1

3.56

3.35

The biggest gap between genders **is in expressing friendly emotions**

2.82

2.74

2.83

2.77

Express feelings of sympathy (e.g., saying you are sorry to hear about something, saying you understand).

Express friendly emotions (e.g., smiling, giving compliments, making small talk).

Hide your disapproval about something someone has done.

Hide your annoyance about something someone has done.

■ Female ☐ Male

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N = 1699 Consumers and Providers: 556 Providers and 1143 Consumers; Arithmetic means for each item are displayed. 1-5 scale with 1-never, 2-sometimes, 3-about half the time, 4-most of the time, 5-always

Portuguese users perform the most expressive emotional labor; **Norwegian** users perform the least.

Portugal reports highest scores on both elements.

Norway reports low scores on both elements.

Cross-Country Average: 3.18, 3.45

Denmark: 3.08, 3.47

France: 3.1, 3.4

Germany: 3.24, 3.4

Ireland: 3.04, 3.5

Italy: 3.13, 3.58

Netherlands: 3.22, 3.28

Norway: 2.95, 3.32

Poland: 3.18, 3.61

Portugal: 3.75, 3.85

Spain: 3.25, 3.18

Switzerland: 3.25, 3.41

UK: 2.99, 3.44

▮ Express friendly emotions (e.g., smiling, giving compliments, making small talk).

▯ Express feelings of sympathy (e.g., saying you are sorry to hear about something, saying you understand).

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N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-never, 2-sometimes, 3-about half the time, 4-most of the time, 5-always
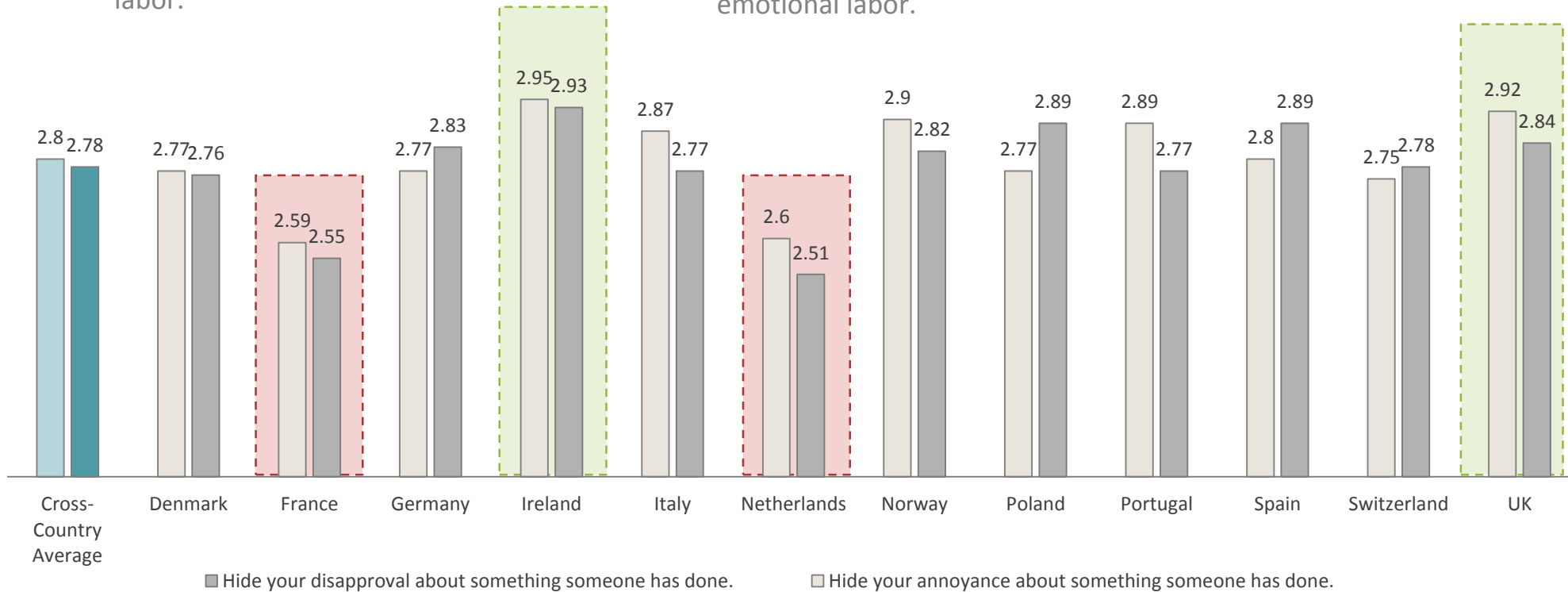
Users **do not** frequently perform suppressive emotional labor.

English speaking participants score highest for suppressive emotional labor.

France and **The Netherlands** report the least suppressive emotional labor.

Cross-Country Average: 2.8, 2.78
Denmark: 2.77, 2.76
France: 2.59, 2.55
Germany: 2.77, 2.83
Ireland: 2.95, 2.93
Italy: 2.87, 2.77
Netherlands: 2.6, 2.51
Norway: 2.9, 2.82
Poland: 2.77, 2.89
Portugal: 2.89, 2.77
Spain: 2.8, 2.89
Switzerland: 2.75, 2.78
UK: 2.92, 2.84

■ Hide your disapproval about something someone has done.   □ Hide your annoyance about something someone has done.

N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-never, 2-sometimes, 3-about half the time, 4-most of the time, 5-always

Key Insights into Emotional Labor

- Users of the sharing economy report, on average, **moderate to high levels** of expressing positive emotions and moderate levels of suppressing negative emotions.

- However, **consumers** score slightly higher for emotional labor than providers.

- **Women** perform more emotional labour than men.

- There is a North-South pattern, with Southern European countries such as Portugal and Italy having higher values for emotional labor than Northern European countries such as Norway.

3 Interpersonal Treatment in the Sharing Economy

Do providers and consumers treat each other with respect, dignity, and politeness?

Interpersonal Treatment

The respectful treatment of one's peers is an underappreciated aspect of the experiential reality of the sharing economy. For those who share more frequently, how users are treated has a significant impact on whether the sharing economy provides decent working conditions.

Consumers perceive themselves as **receiving better treatment** than providers.

Users overall still perceive themselves as being treated with politeness, dignity, and respect.

3.92

3.83

3.88

3.68

3.62

3.61

Consumers/Providers treat me in a polite manner.

Consumers/Providers treat me with dignity.

Consumers/Providers treat me with respect.

☐ Providers ☐ Consumers

N = 1699 Consumers and Providers; Arithmetic means for each group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Female users perceive themselves as **receiving better treatment** than male users.

The largest experiential difference between genders is in **polite treatment.**

3.94

3.74

3.85

3.68

3.89

3.7

Consumers/Providers treat me in a polite manner.

Consumers/Providers treat me with dignity.

Consumers/Providers treat me with respect.

■ Female ■ Male

N = 1699 Consumers and Providers; Arithmetic means for each gender are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree
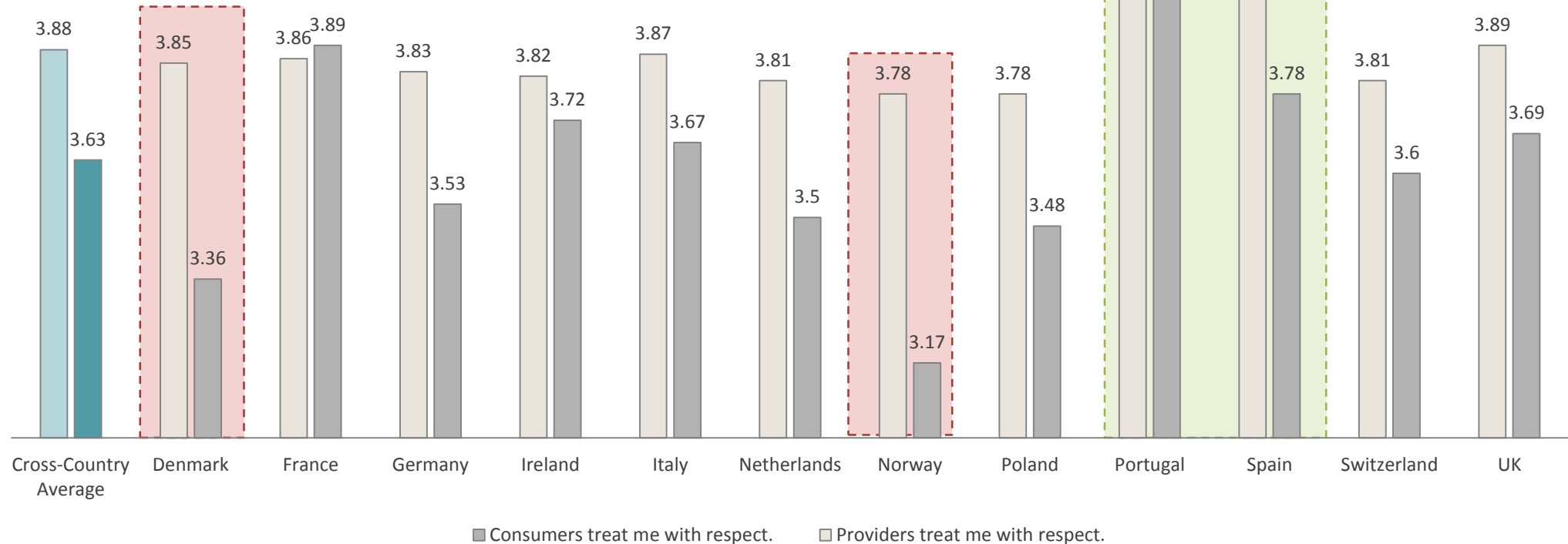
Perceptions of respectful treatment differ between northern and southern Europe.

Norwegian and **Danish providers** feel the least respected by consumers.

Portuguese and **Spanish consumers** feel the most respected by providers.

	Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
Providers treat me with respect	3.88	3.85	3.86	3.83	3.82	3.87	3.81	3.78	3.78	4.16	4.07	3.81	3.89
Consumers treat me with respect	3.63	3.36	3.89	3.53	3.72	3.67	3.5	3.17	3.48	4.19	3.78	3.6	3.69

◼ Consumers treat me with respect. ◻ Providers treat me with respect.

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N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Professionalism: Sharing Economy users have high expectations of professionalism from their peers.
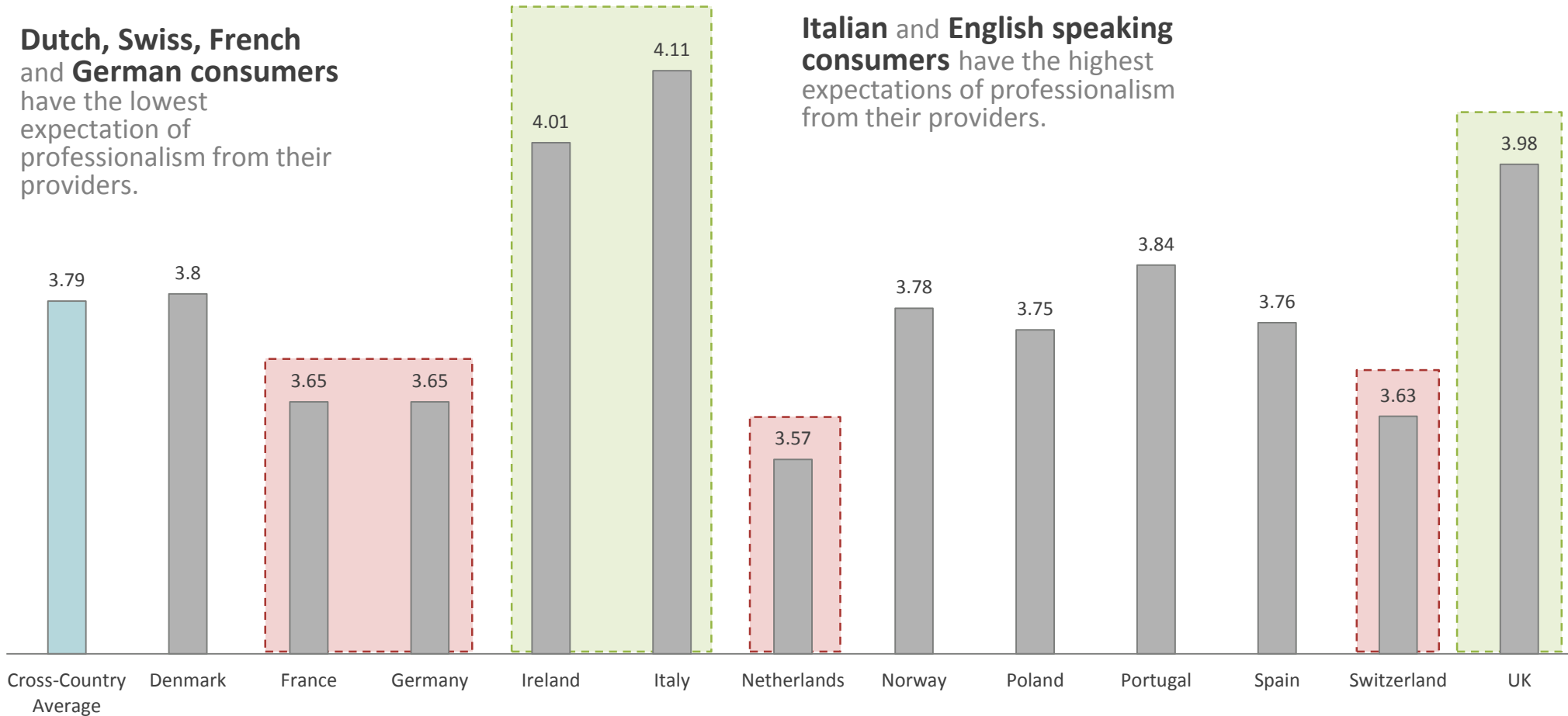
66%

of consumers **expect* a professional level of service** from their providers.

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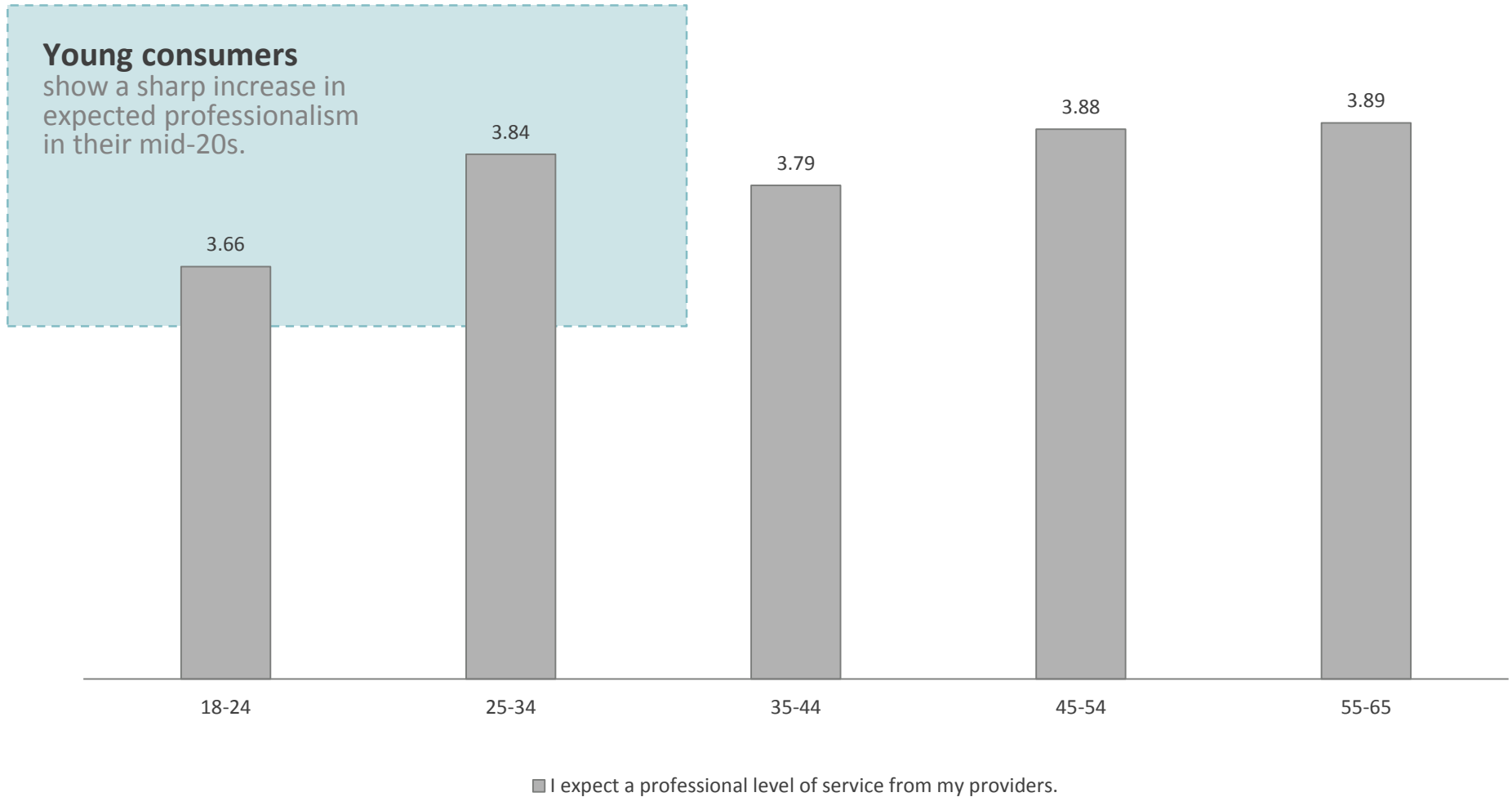
European consumers expect a **professional level of service** from their providers.

Dutch, Swiss, French and **German consumers** have the lowest expectation of professionalism from their providers.

Italian and **English speaking consumers** have the highest expectations of professionalism from their providers.

Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
3.79	3.8	3.65	3.65	4.01	4.11	3.57	3.78	3.75	3.84	3.76	3.63	3.98

N = 1143 Consumers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Younger consumers have the lowest expectations of professionalism from providers.

Young consumers
show a sharp increase in
expected professionalism
in their mid-20s.

3.66	3.84	3.79	3.88	3.89
18-24	25-34	35-44	45-54	55-65

I expect a professional level of service from my providers.

N = 1143 Consumers; Arithmetic means for each age-group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Key Insights on Interpersonal Treatment

- **Overall treatment of peers** in the European sharing economy is very good: Consumers and providers treat each other with respect, with dignity, and in a polite manner.

- **Consumers** report better treatment than providers.

- **Women** report better treatment than men.

- Consumers expect a **professional level of service** from providers.

- Service expectations increase with **age**.

4 The Rating/Review Systems of the Sharing Economy

The feedback systems employed by sharing economy platforms are essential in building trust between strangers
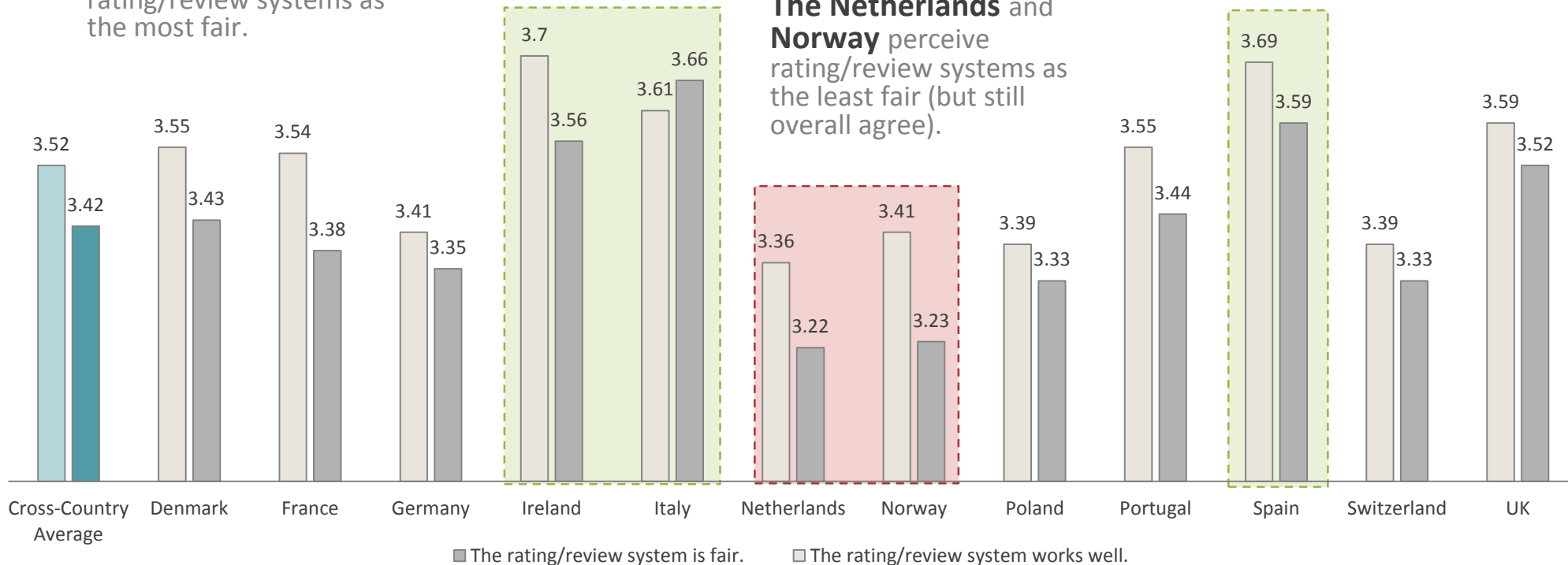
The Rating/Review Systems

Rating systems, through their ability to determine the eligibility and ranking of providers, put consumers into a position of control. But what can you expect from a five-star rating...and how far would you go to get one?

The Irish and southern Europeans have the **most positive assessment** of the rating/review systems

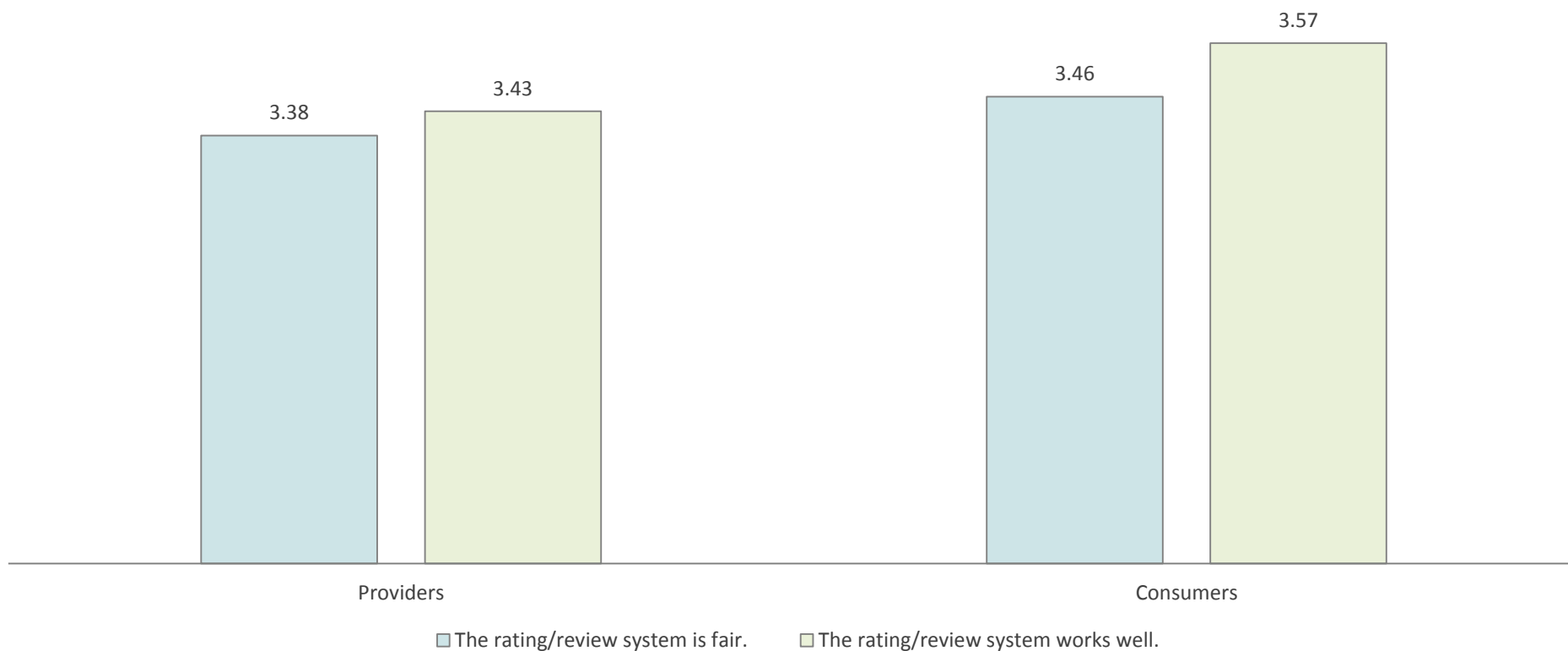**Ireland** and **Southern Europe** perceive rating/review systems as the most fair.

The Netherlands and **Norway** perceive rating/review systems as the least fair (but still overall agree).

	Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
Works well	3.52	3.55	3.54	3.41	3.7	3.61	3.36	3.41	3.39	3.55	3.69	3.39	3.59
Is fair	3.42	3.43	3.38	3.35	3.56	3.66	3.22	3.23	3.33	3.44	3.59	3.33	3.52

■ The rating/review system is fair.   ■ The rating/review system works well.

N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Consumers perceive rating/review systems more positively than providers.

Users overall tend to perceive rating/review systems as **fair** and **working well**.

Providers		Consumers	
3.38	3.43	3.46	3.57

☐ The rating/review system is fair.   ☐ The rating/review system works well.

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N = 1699 Consumers and Providers: 556 Providers and 1143 Consumers; Arithmetic means for each item are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Ratings Literacy: Sharing Economy consumers feel only moderately comfortable with how the rating/review systems work.

53.9%
of consumers claim* to **know how the rating/review system works.**

48.8%
of providers agree* that **consumers know how the rating/review system works**

Percentage of providers/consumers who selected "somewhat agree" or "strongly agree"

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Ratings and Reviews: Sharing Economy users overall do not think that the rating/review systems should be removed.

19.2%

of consumers think* that consumers **should not be rated/reviewed.**

Percentage of consumers who selected "somewhat agree" or "strongly agree"

Ratings and Reviews: Sharing Economy users overall do not think that the rating/review systems should be removed.

22.4%

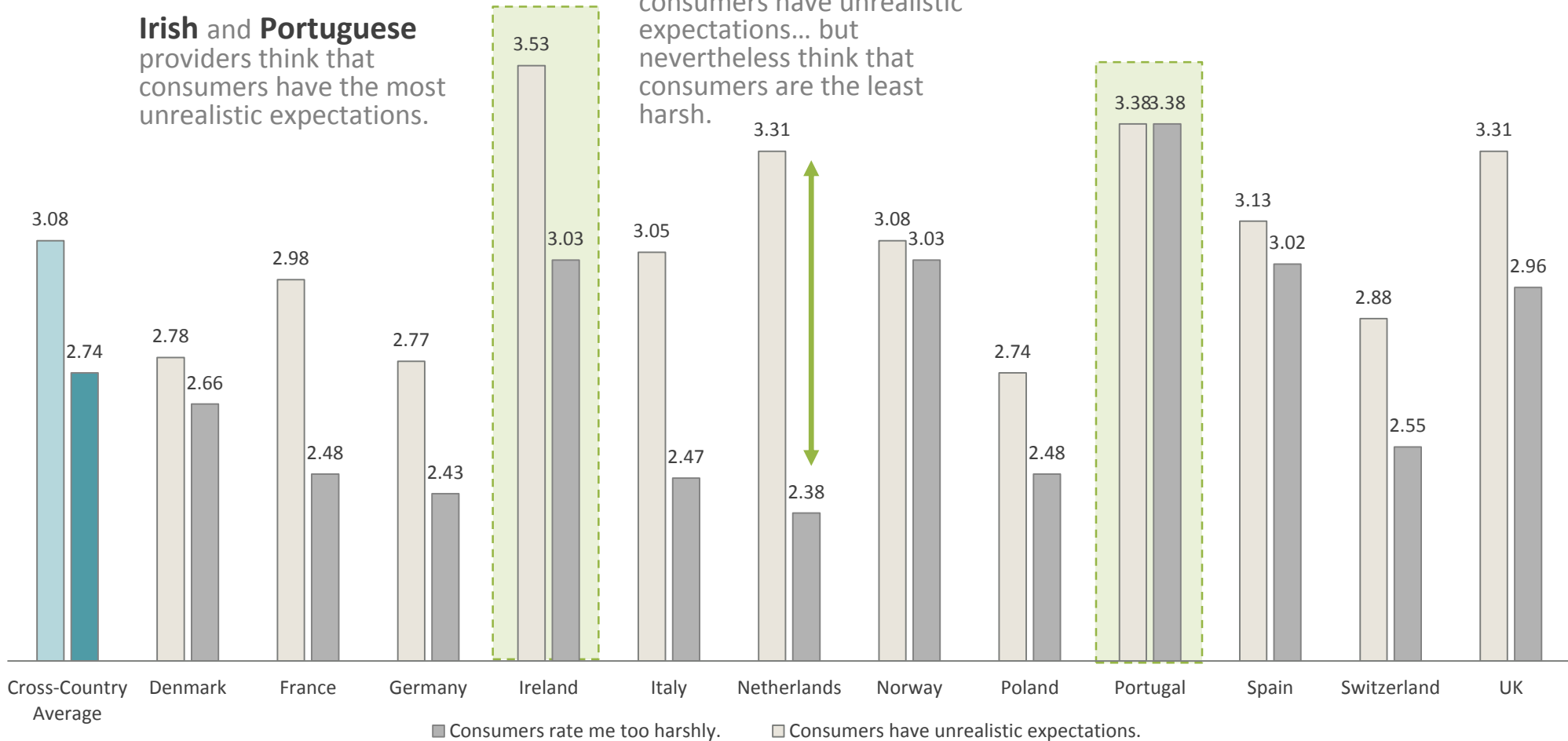of providers want* the **rating/review systems to be removed**

12.5%

of consumers want* the **rating/review systems to be removed**

Percentage of providers/consumers who selected "somewhat agree" or "strongly agree"

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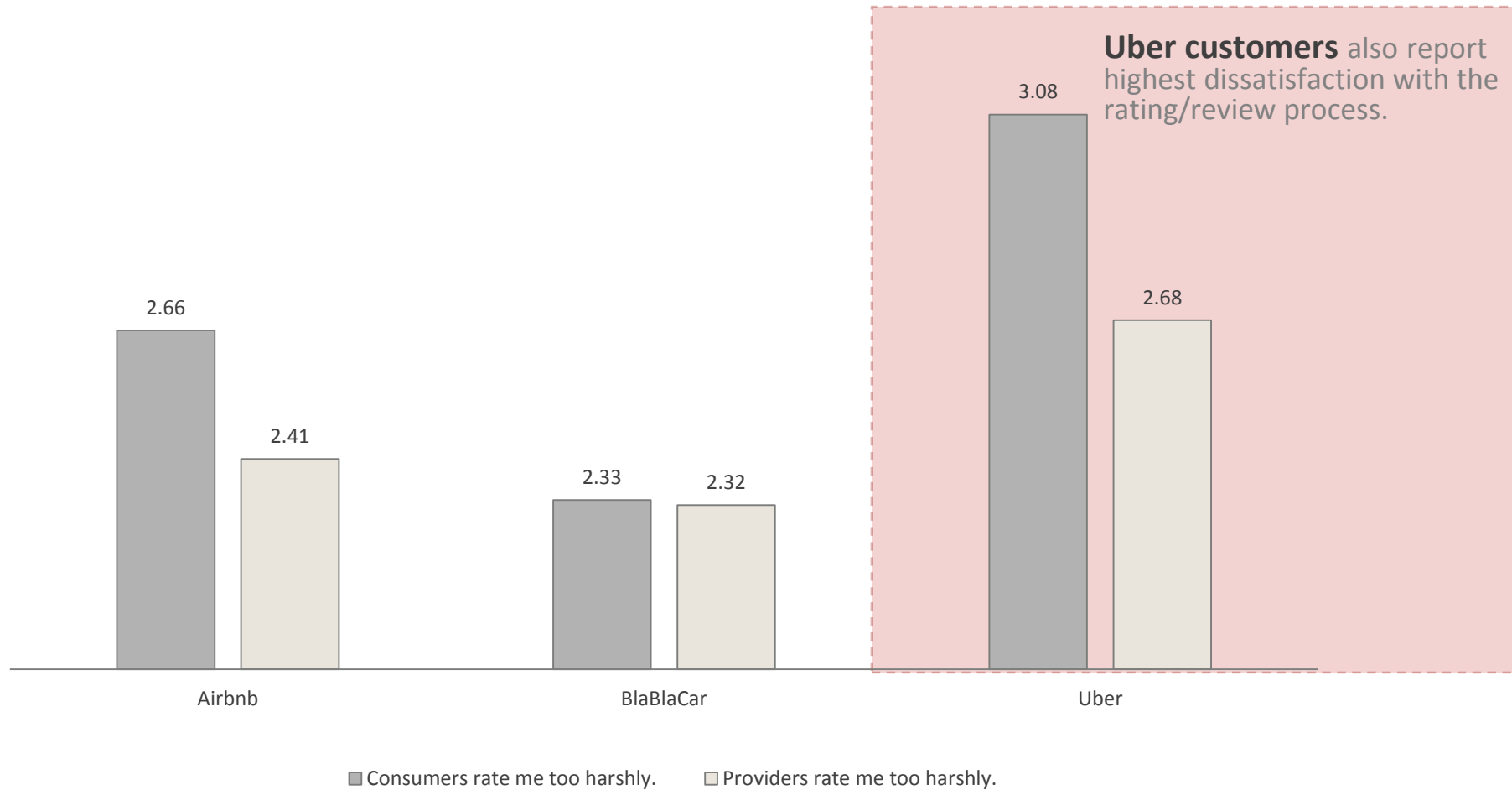European Union funding
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European providers **are divided** over the accuracy of their ratings.

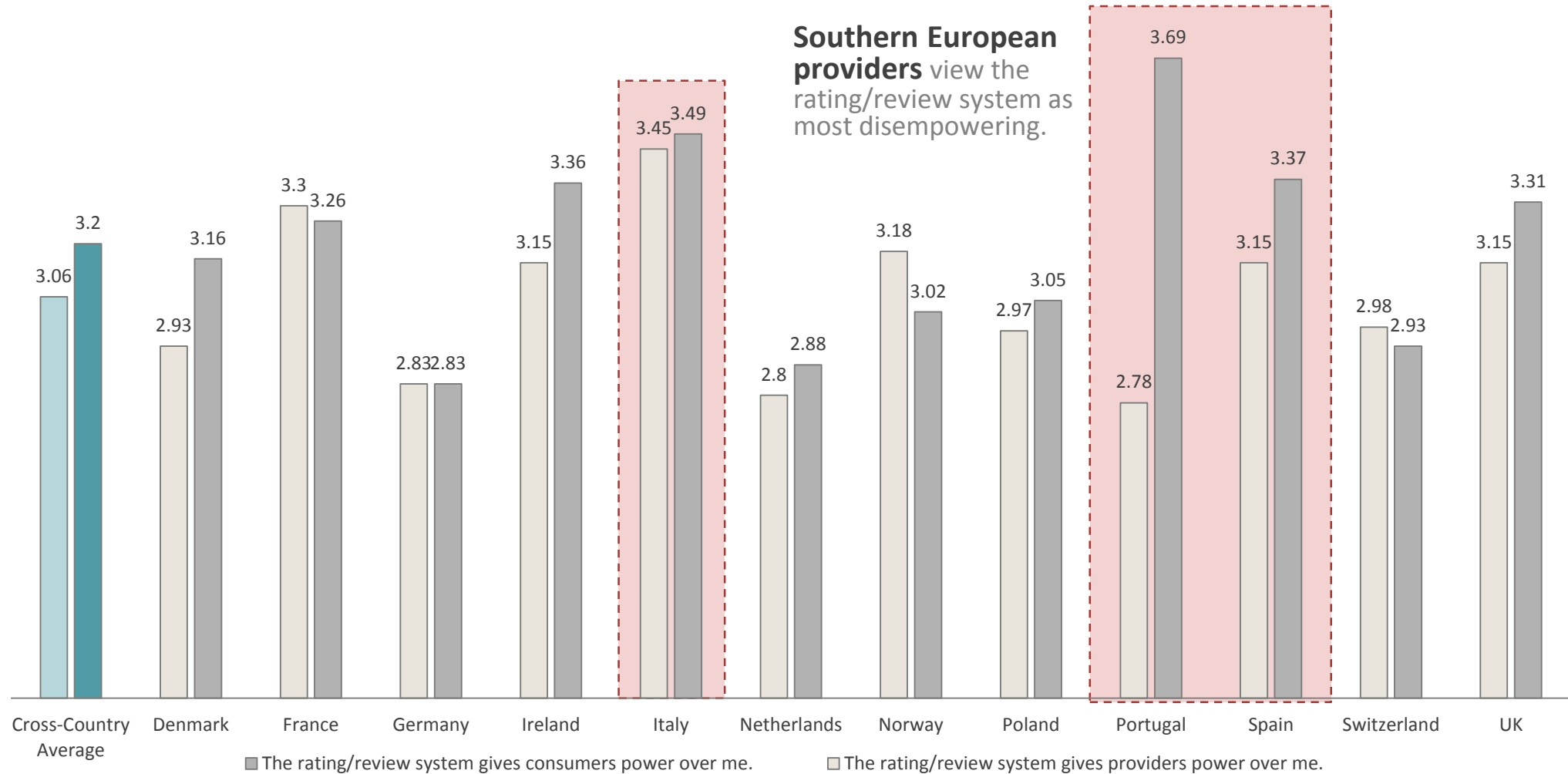**Irish** and **Portuguese** providers think that consumers have the most unrealistic expectations.

Dutch providers agree that consumers have unrealistic expectations... but nevertheless think that consumers are the least harsh.

Chart values by country:

Country	Consumers have unrealistic expectations.	Consumers rate me too harshly.
Cross-Country Average	3.08	2.74
Denmark	2.78	2.66
France	2.98	2.48
Germany	2.77	2.43
Ireland	3.53	3.03
Italy	3.05	2.47
Netherlands	3.31	2.38
Norway	3.08	3.03
Poland	2.74	2.48
Portugal	3.38	3.38
Spain	3.13	3.02
Switzerland	2.88	2.55
UK	3.31	2.96

◼ Consumers rate me too harshly. ◻ Consumers have unrealistic expectations.

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N = 556 Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Uber drivers perceive their ratings to be the most tough.

Uber customers also report highest dissatisfaction with the rating/review process.

Airbnb: 2.66, 2.41

BlaBlaCar: 2.33, 2.32

Uber: 3.08, 2.68

■ Consumers rate me too harshly.　■ Providers rate me too harshly.

N = 1253 Consumers and Providers; Arithmetic means for each item are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Southern European users think that the rating/review system creates **power imbalances**.

Southern European providers view the rating/review system as most disempowering.

	Portugal	Spain
3.69		

Cross-Country Average: 3.06, 3.2
Denmark: 2.93, 3.16
France: 3.3, 3.26
Germany: 2.83, 2.83
Ireland: 3.15, 3.36
Italy: 3.45, 3.49
Netherlands: 2.8, 2.88
Norway: 3.18, 3.02
Poland: 2.97, 3.05
Portugal: 2.78, 3.69
Spain: 3.15, 3.37
Switzerland: 2.98, 2.93
UK: 3.15, 3.31

■ The rating/review system gives consumers power over me.   ☐ The rating/review system gives providers power over me.

N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Key Insights on the Rating/Review System

- Rating/review systems are **assessed relatively positively** and seen as a necessary part of the sharing economy.

- A sizable minority of respondents reports **only moderate knowledge** about how the rating/review systems work.

- **Countries** are divided about whether consumers have unrealistic expectations towards providers.

- **Uber drivers** perceive the rating/review systemss as tougher than Airbnb hosts and BlaBlaCar drivers.

5 Dispute Resolution in the Sharing Economy

Despite the cutting-edge technologies which characterize certain sharing economy platforms, peer-to-peer transactions between strangers and mediated by sharing platforms might not always go flawlessly....

Dispute Resolution

Platforms mediate communication through software, determining what, how, and when comments can be made by users. Since customer service interactions are mediated, how can users resolve problems that arise?

Platform concerns: Sharing Economy users have low expectations about platforms resolving their user problems.

36.5%
of users think* that sharing platforms give **high priority to handling user concerns**.

38.9%
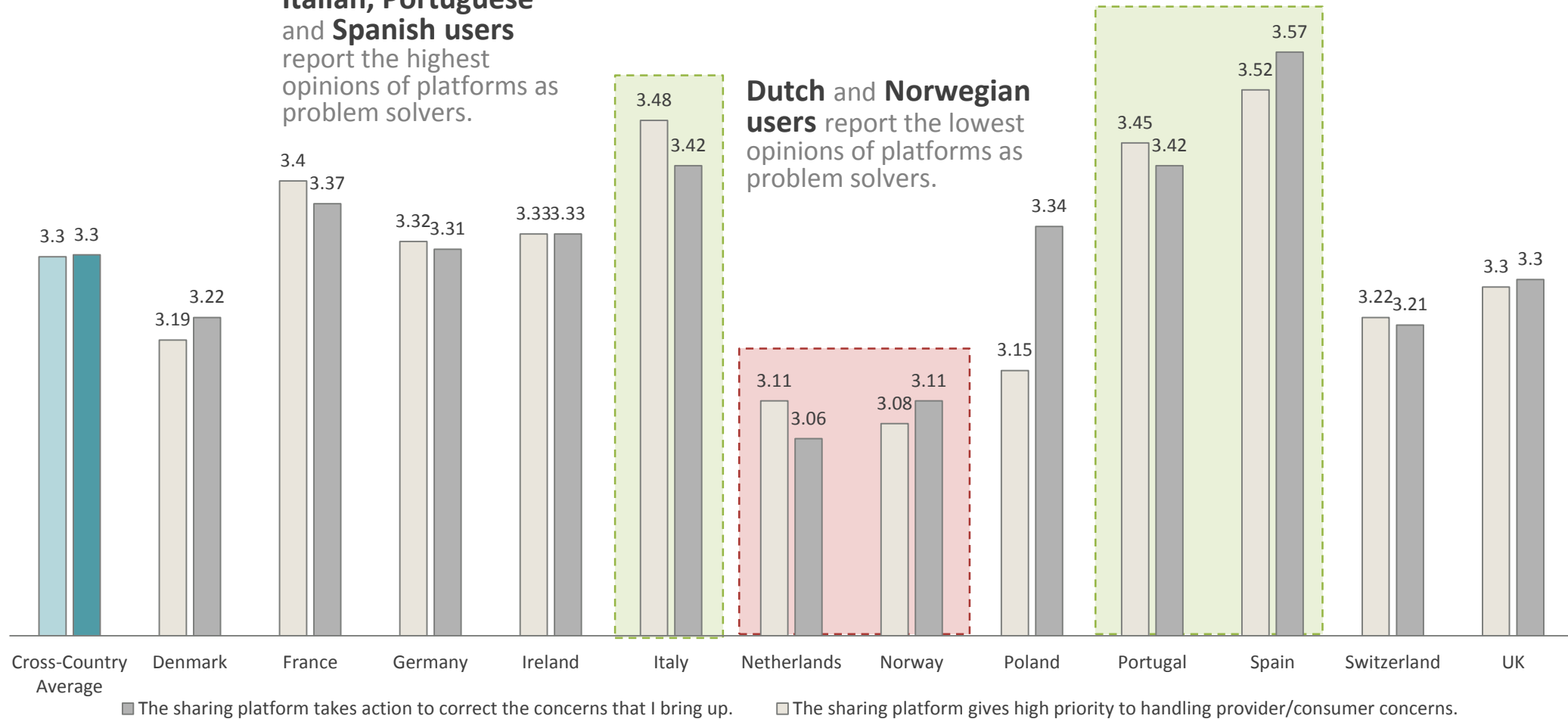of users think* that sharing platforms would **take action to correct their concerns**.

49.7%
of users think* **that all users are treated the same** by the sharing platform.

*Percentage of providers/consumers who selected "somewhat agree" or "strongly agree"
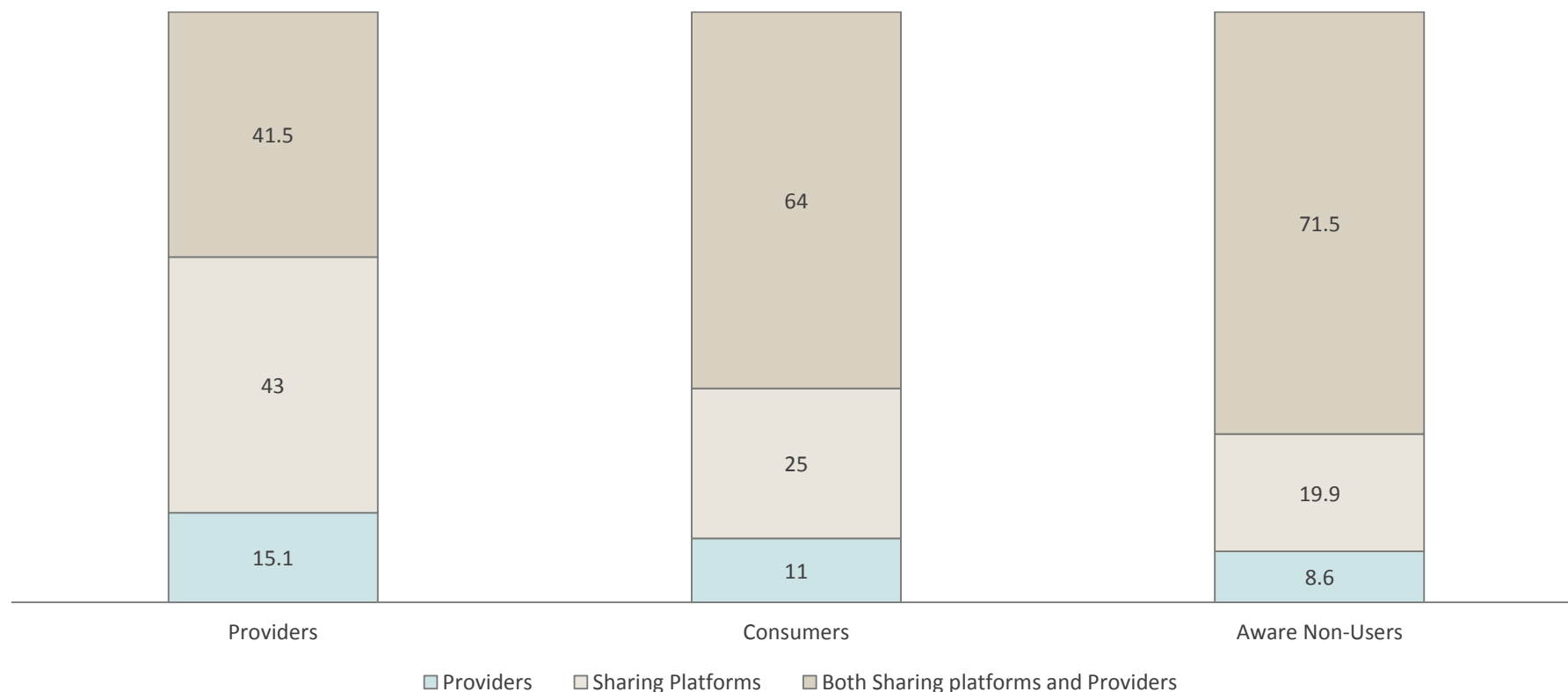
Northern Europeans have **lower perceptions of platforms as problem solvers** than southern Europeans.

Italian, Portuguese and **Spanish users** report the highest opinions of platforms as problem solvers.

Dutch and **Norwegian users** report the lowest opinions of platforms as problem solvers.

Cross-Country Average: 3.3, 3.3
Denmark: 3.19, 3.22
France: 3.4, 3.37
Germany: 3.32, 3.31
Ireland: 3.33, 3.33
Italy: 3.48, 3.42
Netherlands: 3.11, 3.06
Norway: 3.08, 3.11
Poland: 3.15, 3.34
Portugal: 3.45, 3.42
Spain: 3.52, 3.57
Switzerland: 3.22, 3.21
UK: 3.3, 3.3

■ The sharing platform takes action to correct the concerns that I bring up.　　■ The sharing platform gives high priority to handling provider/consumer concerns.

N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Providers assign **more responsibility to themselves** for resolving issues which come up during a sharing experience.

	Providers	Consumers	Aware Non-Users
Both Sharing platforms and Providers	41.5	64	71.5
Sharing Platforms	43	25	19.9
Providers	15.1	11	8.6

☐ Providers   ☐ Sharing Platforms   ☐ Both Sharing platforms and Providers

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each item are displayed. Respondents were asked "Who do you think should be responsible for resolving problems that might come up during a sharing experience?".

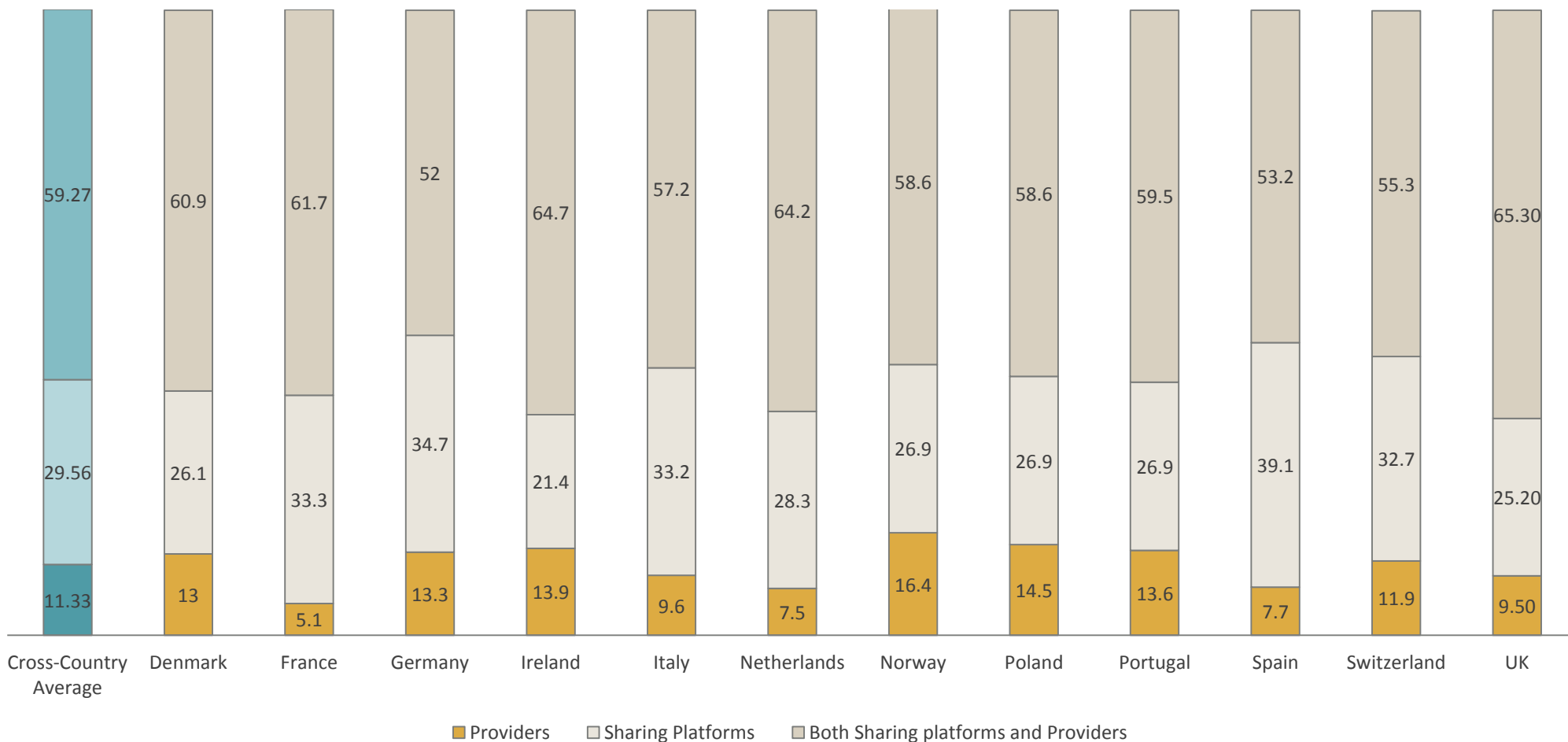European Commission | Horizon 2020 European Union funding for Research & Innovation

Italians view **platforms as more responsible** for resolving problems that might come up during a sharing experience.

■ Providers   ■ Sharing Platforms   ■ Both Sharing platforms and Providers

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each item are displayed. Respondents were asked "Who do you think should be responsible for resolving problems that might come up during a sharing experience?".

Providers assign **more responsibility to themselves** for resolving negative externalities.

	Providers	Consumers	Aware Non-Users
Both Sharing platforms and Providers	34.40	51.70	64.90
Sharing Platforms	45.00	37.10	25.50
Providers	20.70	11.20	9.90

□ Providers   □ Sharing Platforms   □ Both Sharing platforms and Providers

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each item are displayed. Respondents were asked "Who do you think should be responsible for resolving problems that impact non-users?".

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Norwegians view providers as **more responsible** for resolving negative externalities.

	Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
Both Sharing platforms and Providers	59.27	60.9	61.7	52	64.7	57.2	64.2	58.6	58.6	59.5	53.2	55.3	65.30
Sharing Platforms	29.56	26.1	33.3	34.7	21.4	33.2	28.3	26.9	26.9	26.9	39.1	32.7	25.20
Providers	11.33	13	5.1	13.3	13.9	9.6	7.5	16.4	14.5	13.6	7.7	11.9	9.50

■ Providers ☐ Sharing Platforms ☐ Both Sharing platforms and Providers

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each country are displayed. Respondents were asked "Who do you think should be responsible for resolving problems that impact non-users?".

Key Insights on Dispute Resolution

- Sharing economy users in Europe have **low expectations about how sharing platforms handle their concerns**. However, a large part might not have experienced concerns and are undecided.

- There is a **North-South difference**: Southern European users assess platforms more positively when it comes to handling concerns, northern European and Dutch users are more critical.

- **Providers** see more responsibility among themselves and on the side of the sharing platform to resolve problems during and after sharing transactions. **Consumers** and **aware non-users** see both the providers and the platforms responsible to a larger extent.

- Users in **Italy** and **Spain** see platform responsibility as particularly pronounced, whereas users in **Norway** report higher values for provider responsibility.

6 Terms and Conditions in the Sharing Economy

Terms and conditions are crucial elements of a platform's governance. They describe user rights and show the underlying philosophies of how a platform operates

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Terms and Conditions

The human limitations of information processing when it comes to 'terms and conditions' enables sharing platforms to unilaterally determine the terms of exchange. Do users understand the terms and conditions? Are they even accessible?

Terms and Conditions: Sharing Economy users are largely ambivalent about the terms and conditions of platforms.

46.9%

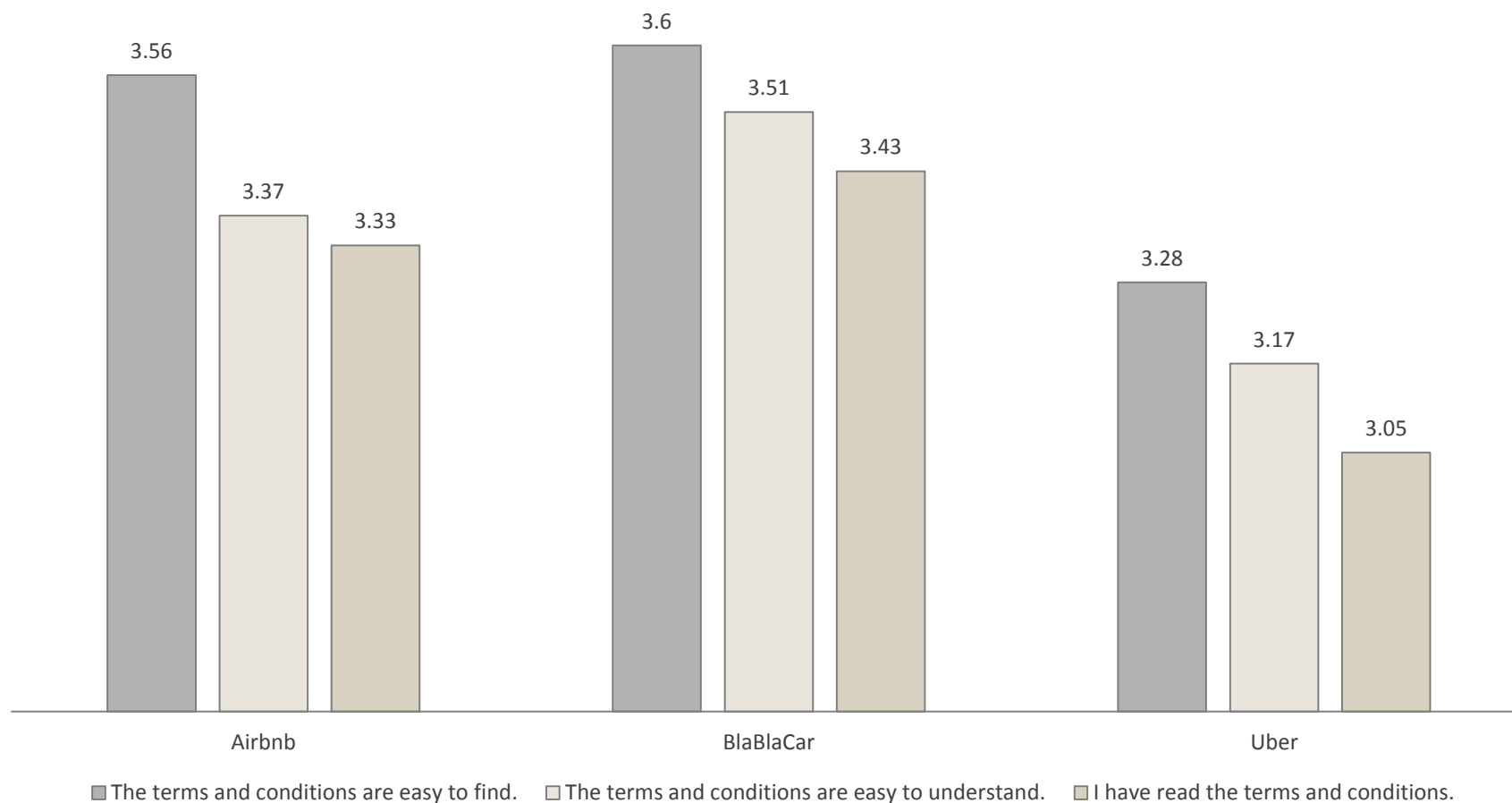of users think* that the **terms and conditions of platforms are easy to understand**.

25.6%

of users think* that sharing platforms **change the terms and conditions too frequently.**

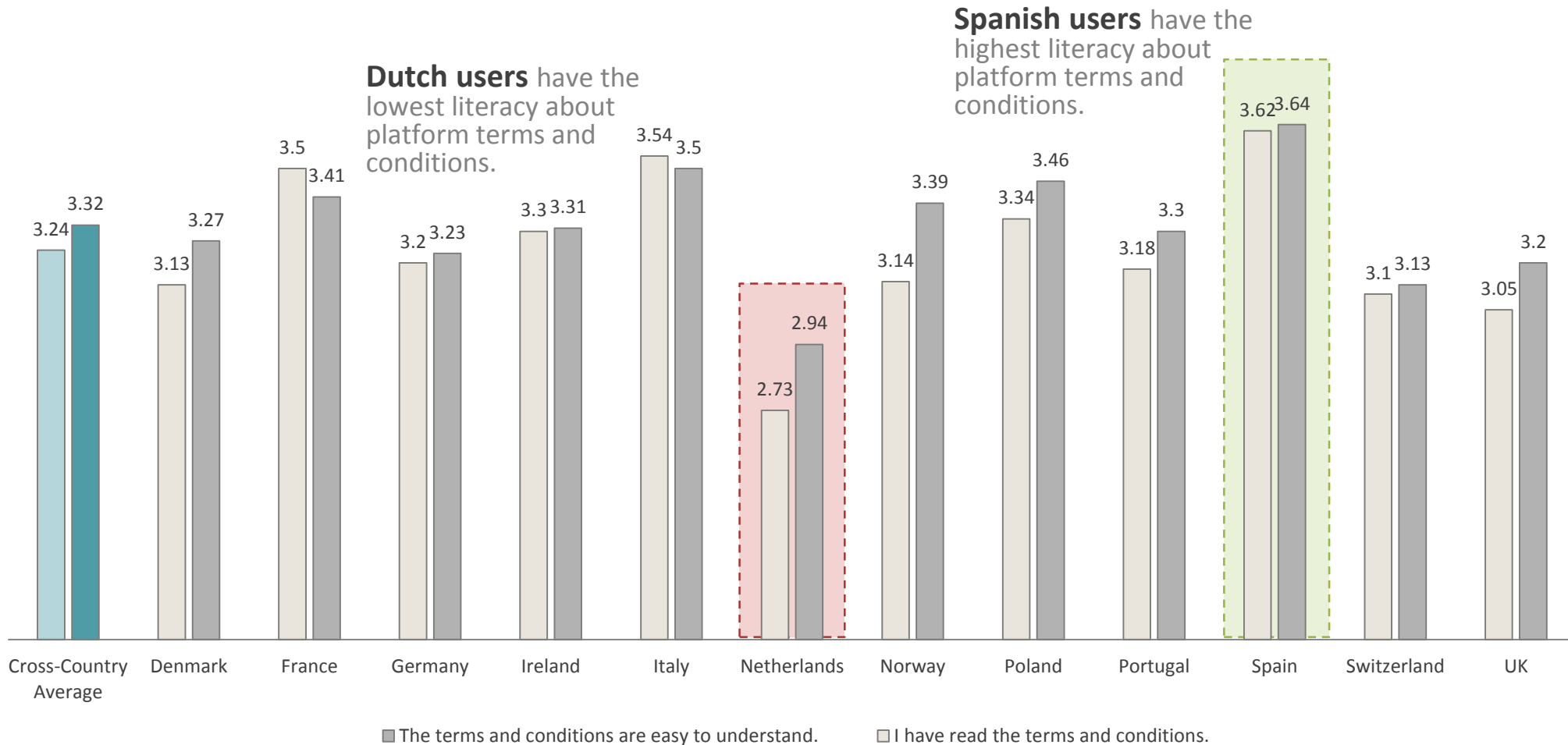**32.9%**

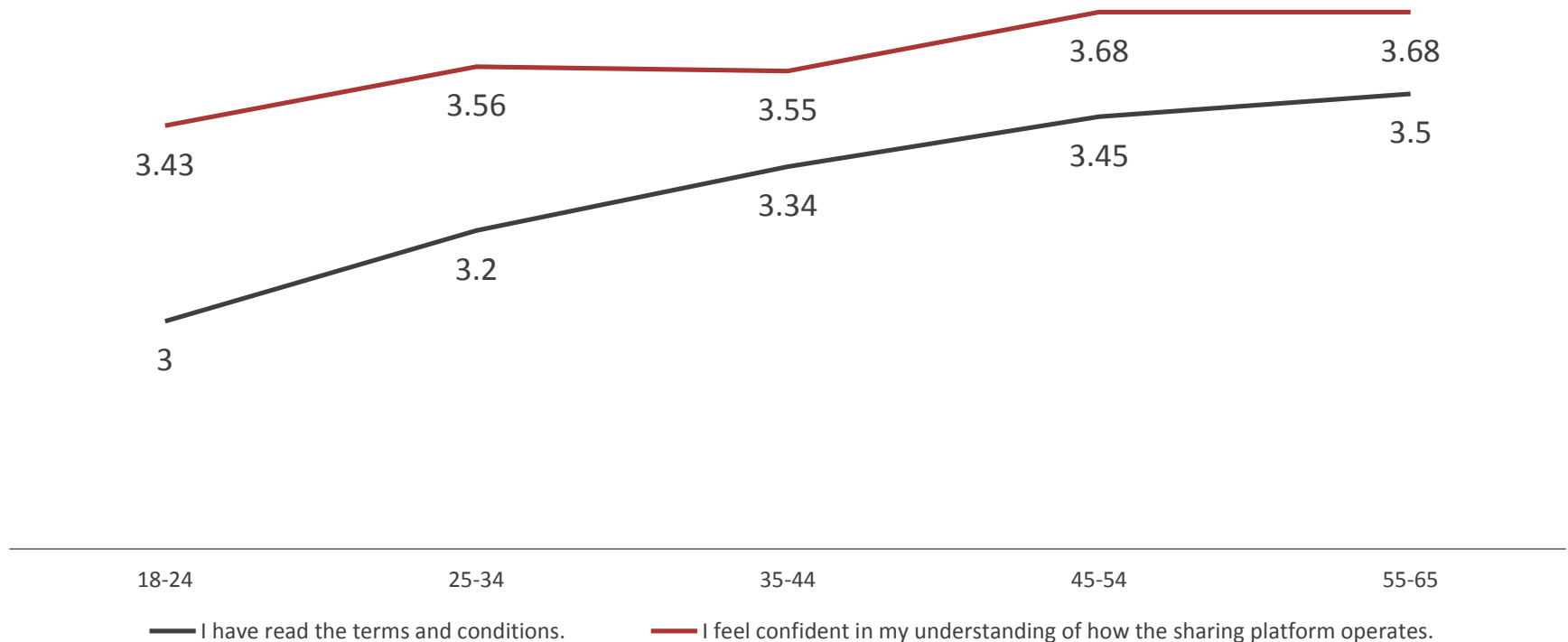of users are **hesitant* to question sharing platform's policies**.

Percentage of providers/consumers who selected "somewhat agree" or "strongly agree"

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BlaBlaCar is perceived to have the most accessible terms and conditions. **Uber** has the least accessible.

Airbnb: 3.56, 3.37, 3.33

BlaBlaCar: 3.6, 3.51, 3.43

Uber: 3.28, 3.17, 3.05

■ The terms and conditions are easy to find.   ■ The terms and conditions are easy to understand.   ■ I have read the terms and conditions.

N = 1253 Consumers and Providers; Arithmetic means for each group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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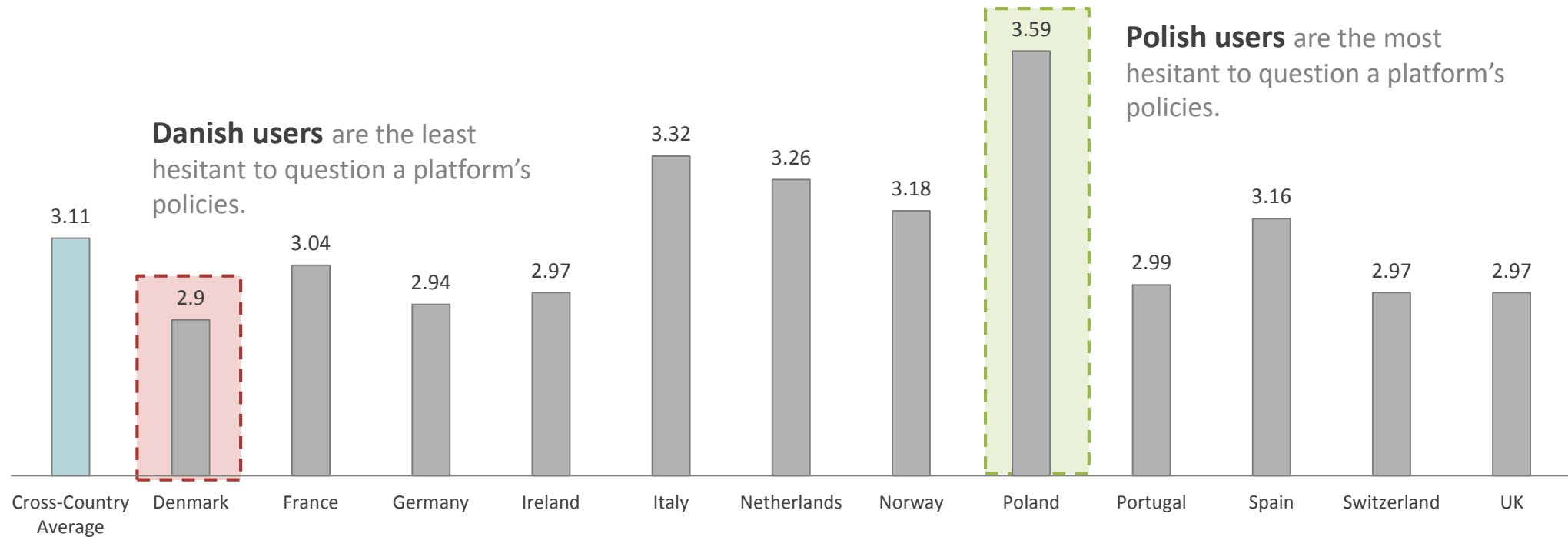
European users display **moderate literacy** about platform terms and conditions.

Dutch users have the lowest literacy about platform terms and conditions.

Spanish users have the highest literacy about platform terms and conditions.

Country	I have read the terms and conditions.	The terms and conditions are easy to understand.
Cross-Country Average	3.24	3.32
Denmark	3.13	3.27
France	3.5	3.41
Germany	3.2	3.23
Ireland	3.3	3.31
Italy	3.54	3.5
Netherlands	2.73	2.94
Norway	3.14	3.39
Poland	3.34	3.46
Portugal	3.18	3.3
Spain	3.62	3.64
Switzerland	3.1	3.13
UK	3.05	3.2

■ The terms and conditions are easy to understand.   ■ I have read the terms and conditions.

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N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Older users display higher literacy about platform terms and conditions.

3.43

3.56

3.55

3.68

3.68

3.5

3.45

3.34

3.2

3

18-24   25-34   35-44   45-54   55-65

—— I have read the terms and conditions.   —— I feel confident in my understanding of how the sharing platform operates.

N = 1699 Consumers and Providers; Arithmetic means for each age-group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Across Europe, participants show **hesitancy** towards questioning a platform's policies.

Danish users are the least hesitant to question a platform's policies.

Polish users are the most hesitant to question a platform's policies.

3.11 — Cross-Country Average
2.9 — Denmark
3.04 — France
2.94 — Germany
2.97 — Ireland
3.32 — Italy
3.26 — Netherlands
3.18 — Norway
3.59 — Poland
2.99 — Portugal
3.16 — Spain
2.97 — Switzerland
2.97 — UK

N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Key Insights on Terms and Conditions

- Sharing economy users have **mixed opinions** about platform terms and conditions, with a slight positive angle overall.

- **BlaBlaCar**'s terms and conditions fare best, followed by **Airbnb**. Users assess **Uber**'s terms and conditions as the worst among the three major sharing platforms in Europe.

- Users in the **Netherlands** report the lowest levels of literacy about terms and conditions. Those in **Spain** report the highest levels.

- Literacy about sharing platforms and their terms and conditions increases with **age**.

- **Polish** users are least critical towards platform policies. **Danish** users are most critical.

7 Pricing in the Sharing Economy

The complicated model of sharing economy pricing can raise questions about the transparency and fairness of platform pricing models

Pricing

Sharing economy platforms continue to 'disrupt' traditional businesses, operating with new pricing options and models. Are these options fair? Are platforms taking too much of a 'cut' for what is simply mediating between peers?

Pricing: Opinions vary about the fairness of the sharing economy's pricing mechanisms.

54%
of users think* that sharing platforms **provide clear information about the pricing system**.

31.5%
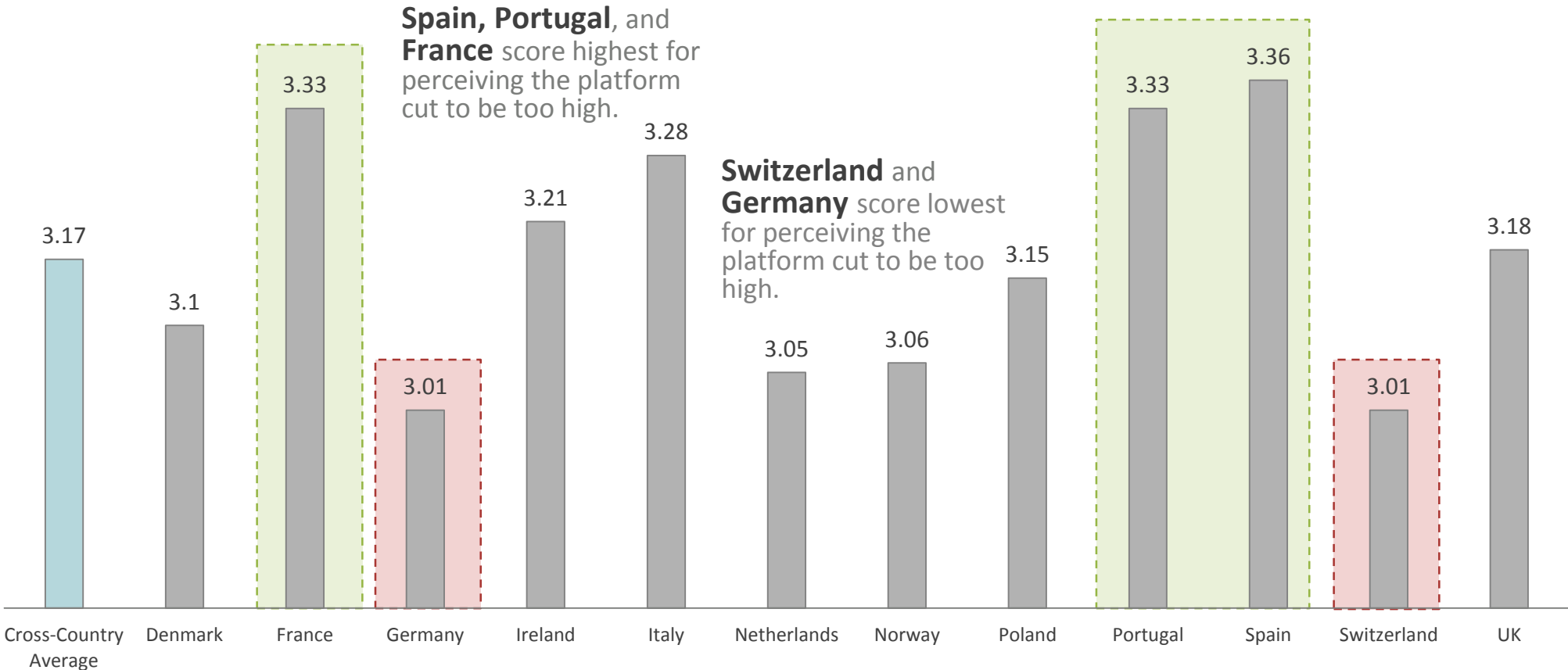of users think* that **the sharing platform cut is too large.**

44.6%
of users think* that the sharing platforms' **pricing policies are fair.**

Percentage of providers/consumers who selected "somewhat agree" or "strongly agree"

Older users perceive platform pricing information most clearly.

Users show a sharp increase in perceived pricing clarity in their mid-40s.

3.36 — 18-24
3.44 — 25-34
3.48 — 35-44
3.62 — 45-54
3.65 — 55-65

■ The sharing platform provides clear information about the pricing system.

N = 1699 Consumers and Providers; Arithmetic means for each age-group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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European Users agree that platforms **take too much money** from each transaction.

Spain, Portugal, and **France** score highest for perceiving the platform cut to be too high.

Switzerland and **Germany** score lowest for perceiving the platform cut to be too high.

Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
3.17	3.1	3.33	3.01	3.21	3.28	3.05	3.06	3.15	3.33	3.36	3.01	3.18

N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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European users perceive **platform pricing policies** as being moderately fair.

Italians perceive platform pricing policies as the most fair.

Norwegians perceive platform pricing policies as the least fair.

Cross-Country Average	3.35
Denmark	3.35
France	3.28
Germany	3.39
Ireland	3.38
Italy	3.52
Netherlands	3.29
Norway	3.27
Poland	3.32
Portugal	3.41
Spain	3.41
Switzerland	3.29
UK	3.32

N = 1699 Consumers and Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Key Insights on Pricing

- Users' opinions about pricing practices are **mixed**, with a large part of users being ambivalent or not knowledgeable.

- The **pricing information** provided by platforms seems to be clear but a third of users think that the **platform cut is too large**.

- **Younger** users find the pricing information less clear than **older** users.

- The perceptions of platforms as greedy vary across **countries**: More users in Spain, Portugal, and France find the platform cut too large compared with Germany and Switzerland.

- There is a small **North-South divide** in pricing fairness perceptions. Users in the South, particularly in Italy, Portugal, and Spain, find the pricing policy fairer than those in Norway, France, Switzerland, and the Netherlands.

8 Platform Control in the Sharing Economy

Matching platforms enable flexible and convenient access to under-used assets by connecting providers and consumers. But how do platforms ensure availability and accessibility among providers?

Platform Control

Does the view of convenient flexibility reflect reality or do providers feel pressured to provide more often than they would want to? Are providers able to determine their own schedule or do they feel overly constrained by the platform? Do they think they have the option to reject transactions and to determine themselves who to share with?

The Micro-Entrepreneur: Sharing Economy providers want control over their own schedules.

30.4%
of providers **feel* pressured to provide more often than they would like**.

50.3%
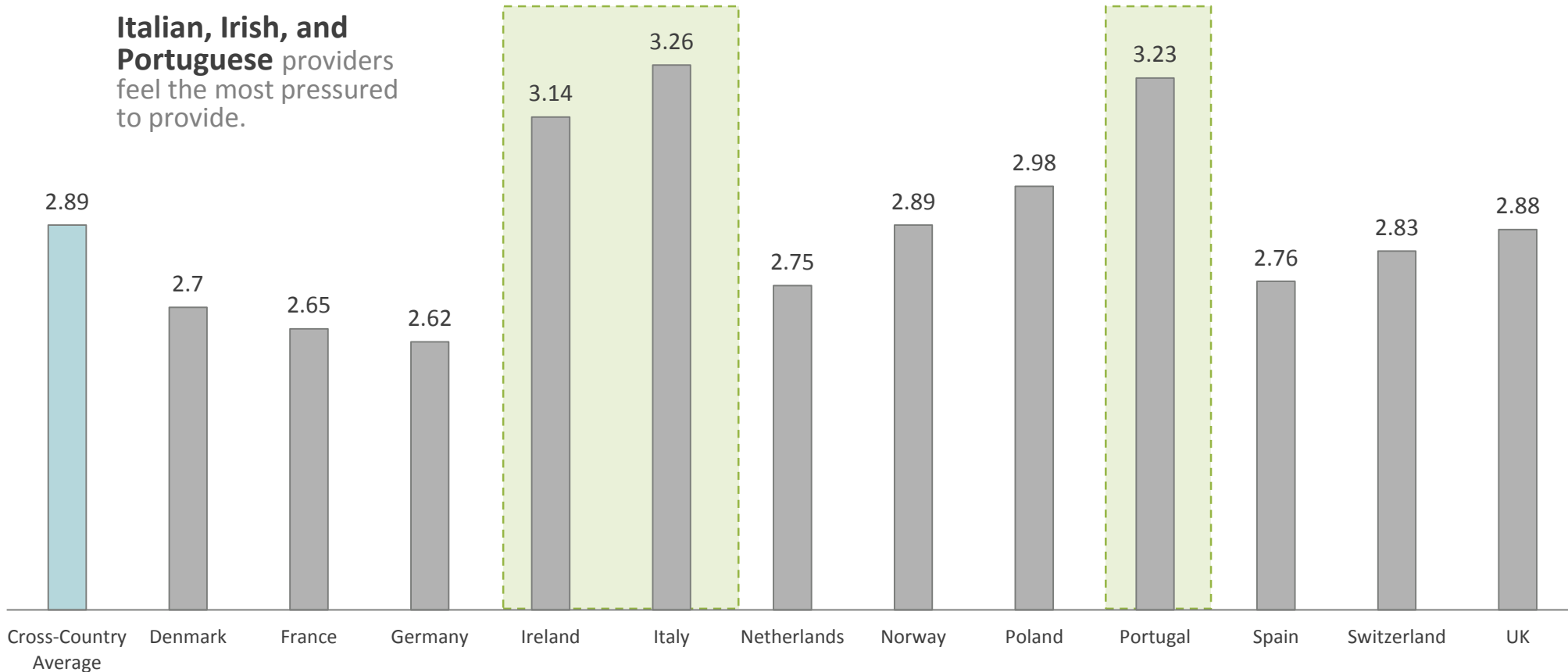of providers **think* there should be no consequences for rejecting a transaction**

63%
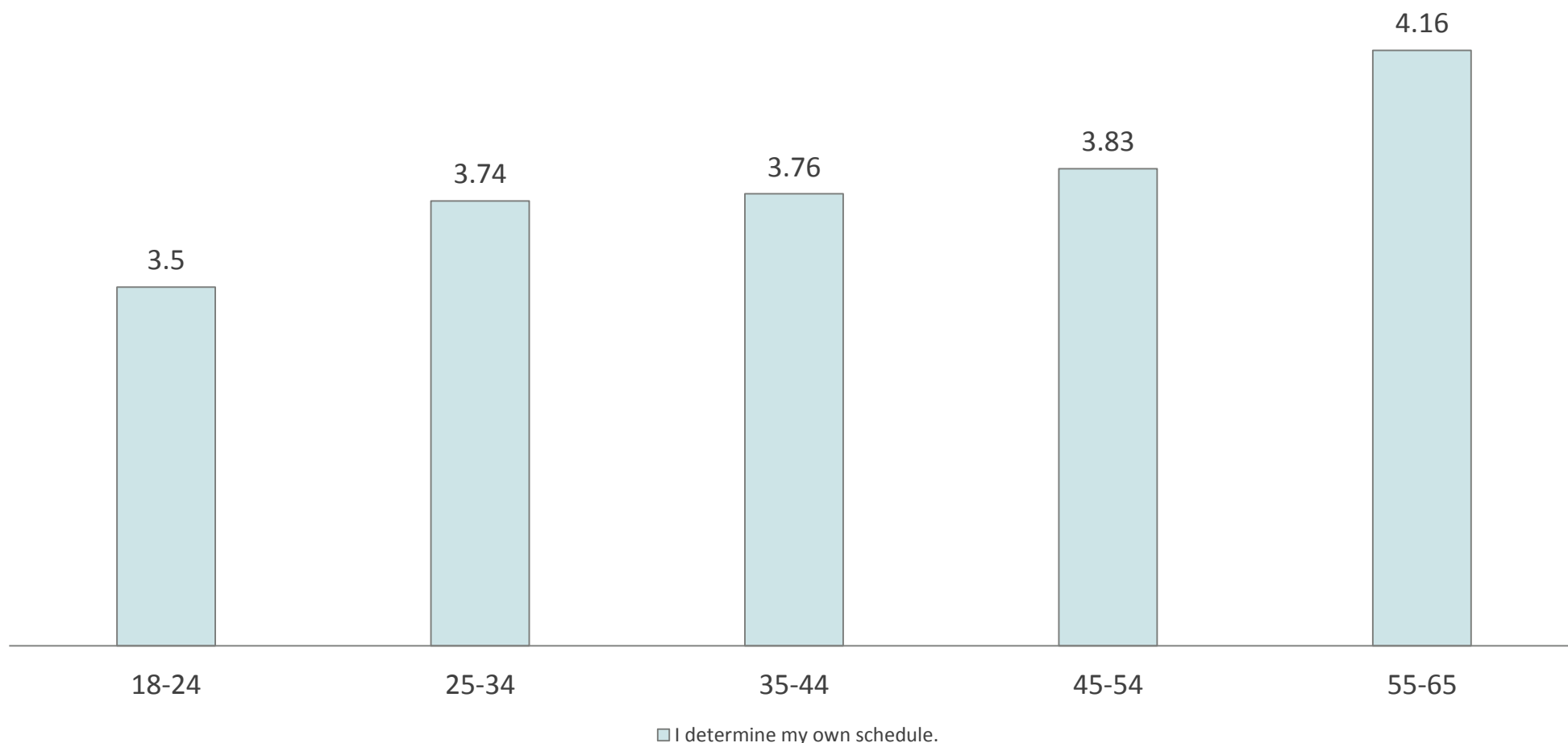of providers **determine their own schedule***.

*Percentage of providers who selected "somewhat agree" or "strongly agree"

Italian providers feel the most pressured to provide more often than they would like.

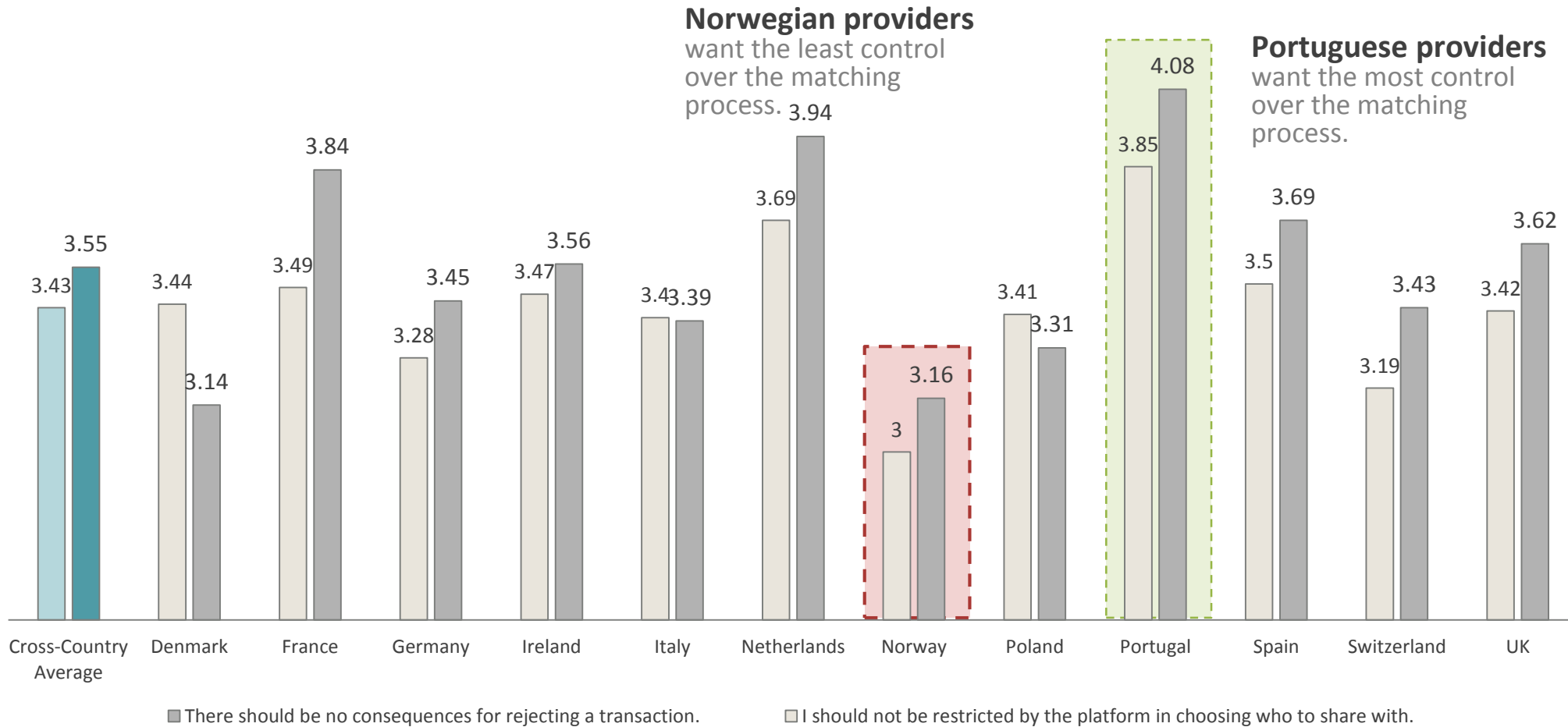**Italian, Irish, and Portuguese** providers feel the most pressured to provide.

Cross-Country Average	2.89
Denmark	2.7
France	2.65
Germany	2.62
Ireland	3.14
Italy	3.26
Netherlands	2.75
Norway	2.89
Poland	2.98
Portugal	3.23
Spain	2.76
Switzerland	2.83
UK	2.88

N = 556 Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Younger providers have the least control over their schedules. Older providers have the most control.

4.16

3.83

3.76

3.74

3.5

18-24   25-34   35-44   45-54   55-65

☐ I determine my own schedule.

N = 556 Providers; Arithmetic means for each age-group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Uber drivers feel the strongest pressure to provide more often than they would like.

Whereas **BlaBlaCar** and **Airbnb** providers largely do not feel pressured to provide, **Uber** drivers feel the pressure strongly.

3.4

2.84

2.51

Airbnb

BlaBlaCar

Uber

I feel pressured to provide more often than I would like.

N = 316 Providers; Arithmetic means for each group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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European providers want control over the matching process.

Norwegian providers
want the least control over the matching process.

Portuguese providers
want the most control over the matching process.

Cross-Country Average: 3.43, 3.55
Denmark: 3.44, 3.14
France: 3.49, 3.84
Germany: 3.28, 3.45
Ireland: 3.47, 3.56
Italy: 3.43, 3.39
Netherlands: 3.69, 3.94
Norway: 3, 3.16
Poland: 3.41, 3.31
Portugal: 3.85, 4.08
Spain: 3.5, 3.69
Switzerland: 3.19, 3.43
UK: 3.42, 3.62

■ There should be no consequences for rejecting a transaction.   □ I should not be restricted by the platform in choosing who to share with.

N = 556 Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Choice: Sharing Economy users want the ability to choose who they share with.

44%
of providers think* they **should not be restricted in choosing who to share with**.

59.5%
of consumers think* they should be **allowed to choose a provider based on their own criteria**.

40.8%
of **consumers feel* they have control over the matching process.**

Percentage of providers/consumers who selected "somewhat agree" or "strongly agree"

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European consumers want a lot of control over choosing their providers.

Danish consumers want the most control over selecting a provider.

Portuguese providers want the least control over selecting a provider.

Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
3.68	3.81	3.71	3.79	3.77	3.76	3.55	3.59	3.79	3.53	3.65	3.7	3.56

N = 1143 Consumers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Key Insights on Platform Control

- Providers desire control over sharing transaction modalities and report **high flexibility**.

- At the same time, many providers feel **pressured** to provide more often than they would want to.

- Providers in **Italy, Portugal, and Ireland** feel most pressured. Providers in **Germany and France** feel least pressured.

- **Younger providers** have less control over their schedule than older ones.

- Consumers in **Denmark, Germany, and Poland** want most control over choosing their providers. Consumers in **Portugal, the Netherlands, UK, and Norway** have lower levels of desired control.

9 Collective Action in the Sharing Economy

An important discussion when it comes to labor and the sharing economy revolves around collective action

Collective Action

Decentralization and hierarchization among users acts as a significant barrier to group identification and subsequent collective action. Are providers organizing and speaking collectively to have their interests represented?

Online Communities: Sharing Economy

35%
of providers use **online communities to connect with other providers***.

30.9%
of **female providers** use online communities to connect with other providers***.

35.5%
of **male providers** use online communities to connect with other providers***.

Percentage of providers who selected "somewhat agree" or "strongly agree"

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Use of online communities among providers varies strongly by country.

Dutch, French, and **German providers** score lowest for use of online communities.

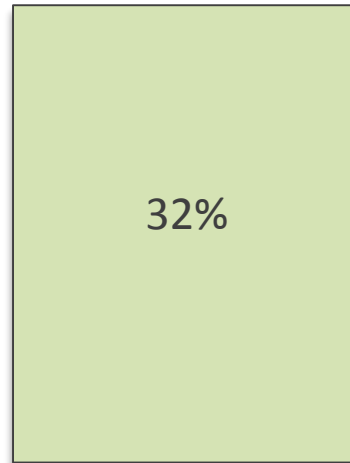**Portuguese** and **Polish providers** score highest for use of online communities.

3.03	2.82	2.63	2.62	3.33	3.04	2.44	3.19	3.41	3.46	3.2	2.98	3.19
Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK

N = 556 Providers; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree
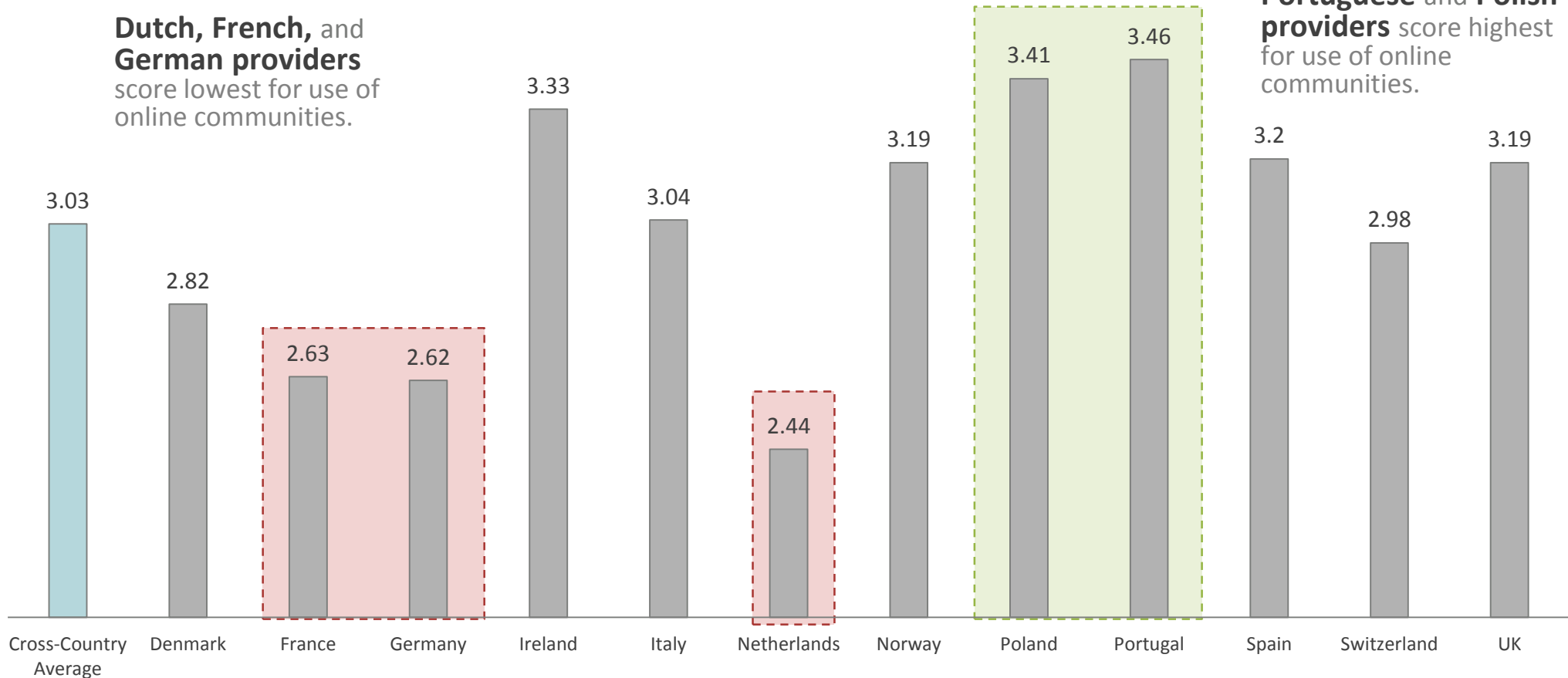
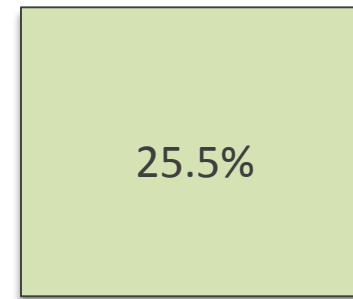# Some examples of **provider communal action.**

50%

of Uber drivers use **online communities to connect with other providers*.**

50%
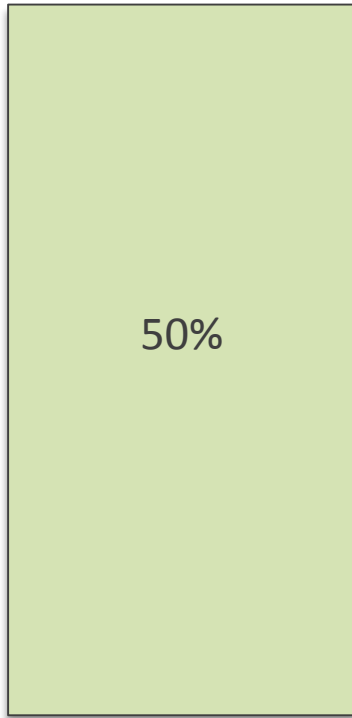
32%

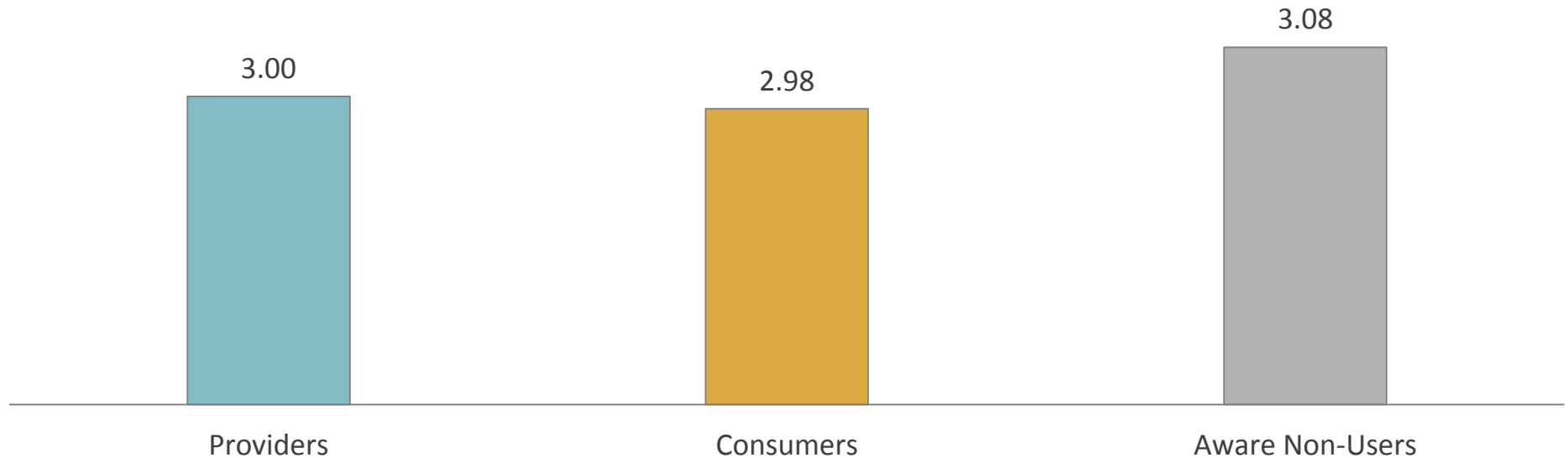of Airbnb hosts use **online communities to connect with other providers*.**

32%

25.5%

of BlaBlaCar drivers use **online communities to connect with other providers*.**

25.5%

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Percentage of providers who selected "somewhat agree" or "strongly agree"

Non-Users **support provider unionization** more than users.

Differences in perception
between respondent group
are, however, slight.

Providers	Consumers	Aware Non-Users
3.00	2.98	3.08

N = 5517 Consumers, Providers and Aware Non-Users; Arithmetic means for each group are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

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Dutch respondents oppose unionization most strongly; **British** respondents are most supportive.

N = 5517 Consumers, Providers and Aware Non-Users; Arithmetic means for each country are displayed. 1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree
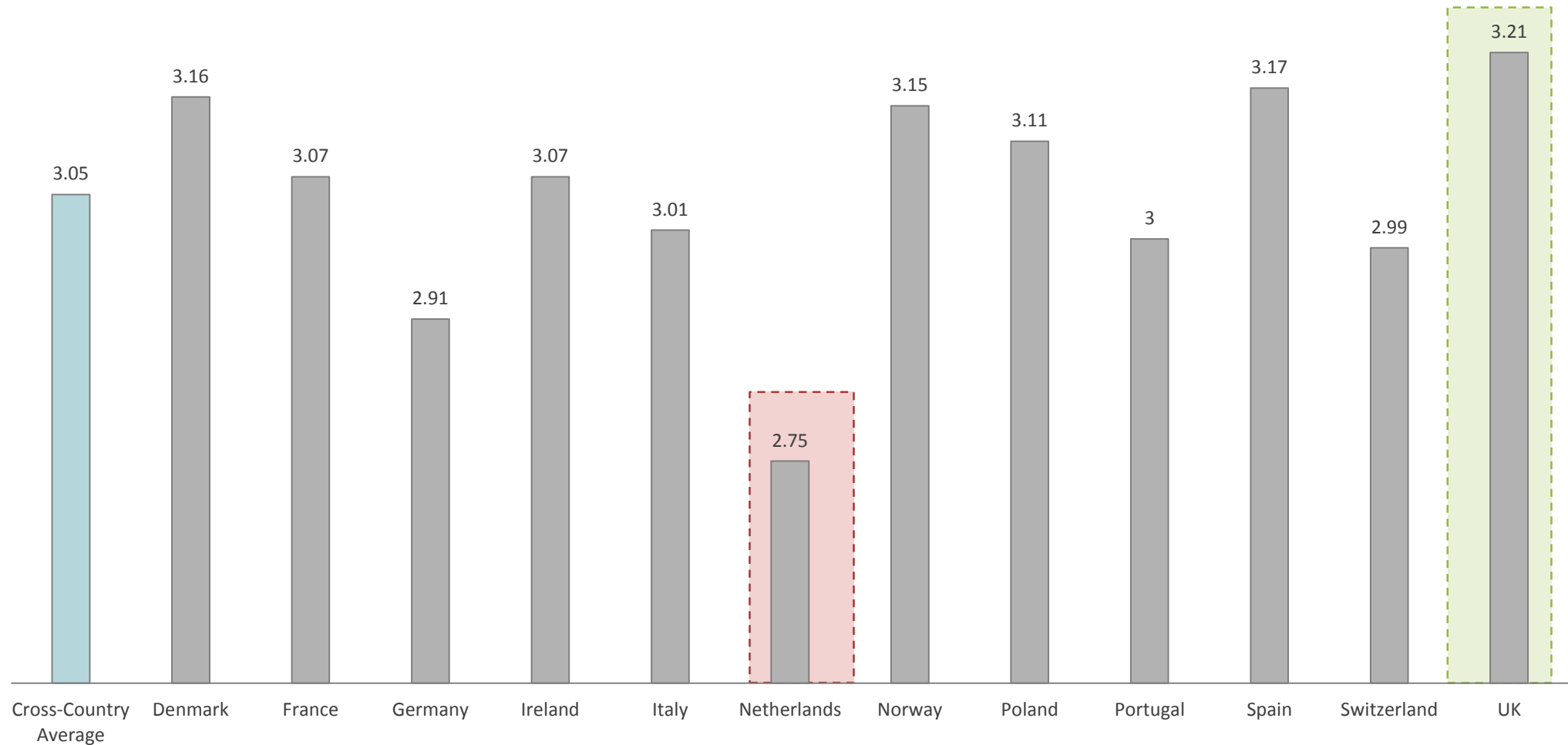
Key Insights on Collective Action

- More than a third of all providers in the survey report using **online communities** to connect with other providers.

- The use of online communities is more prevalent among **male providers** than female providers.

- **Uber drivers** use online communities to a larger extent than Airbnb hosts and BlaBlaCar drivers.

- **Support for unionization of providers** is stronger among non-users than among providers and consumers.

- Support for unionization of providers is strongest in the **UK** and weakest in the **Netherlands**.

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10

Narratives of the Sharing Economy

The initial framing of issues in the media has created path dependencies for discussing platform narratives
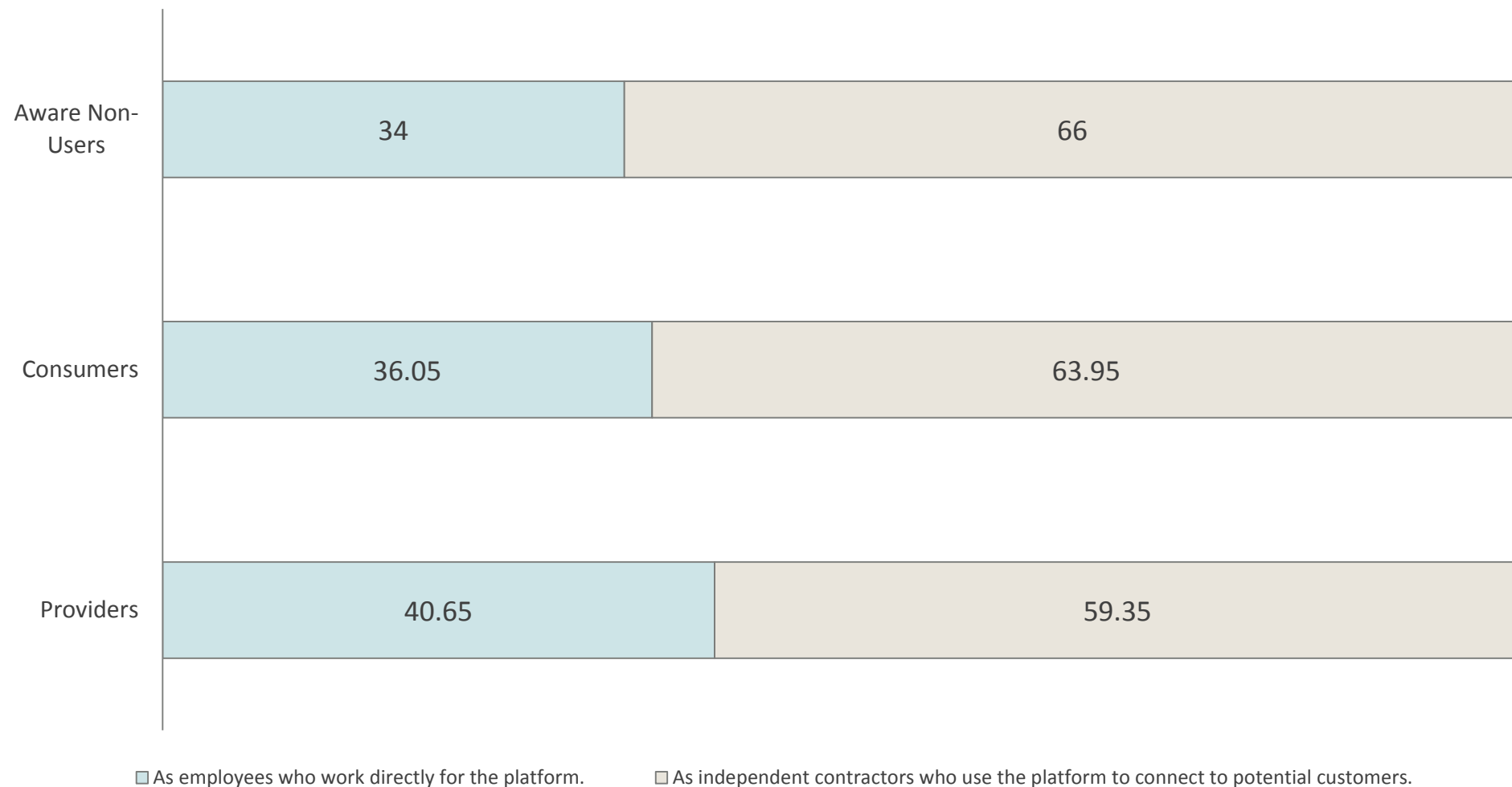
# Narratives of the Sharing Economy

How do respondents perceive sharing economy platforms in terms of their primary function and mission? Do they see them as mere intermediaries between provider and consumers?

Providers have the highest perception of themselves as employees. Non-users have the lowest perception of providers as employees.

Aware Non-Users: 34 | 66

Consumers: 36.05 | 63.95

Providers: 40.65 | 59.35

☐ As employees who work directly for the platform.   ☐ As independent contractors who use the platform to connect to potential customers.

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each item are displayed.

Norwegians have strongest perceptions of providers as employees; The **Dutch** have the weakest perceptions of providers as employees.
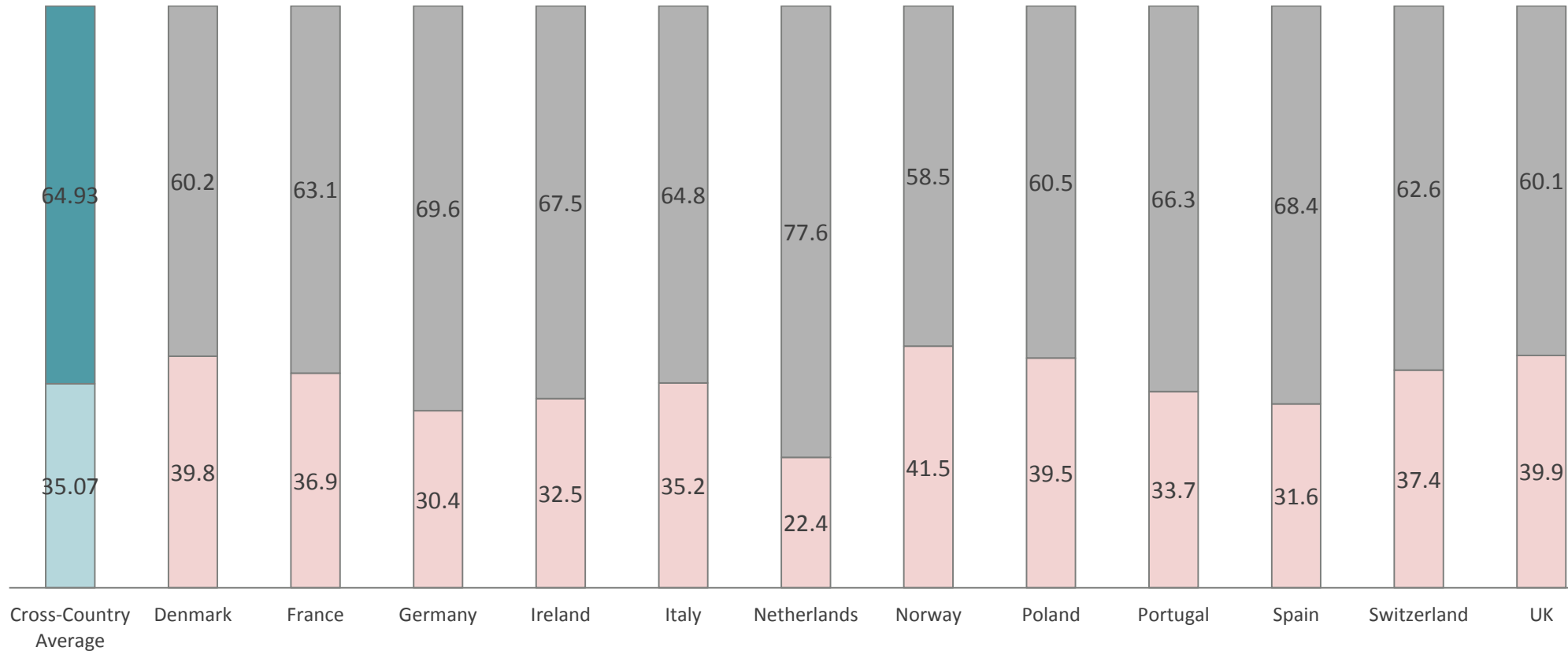
	As employees who work directly for the platform.	As independent contractors who use the platform to connect to potential customers.
Cross-Country Average	35.07	64.93
Denmark	39.8	60.2
France	36.9	63.1
Germany	30.4	69.6
Ireland	32.5	67.5
Italy	35.2	64.8
Netherlands	22.4	77.6
Norway	41.5	58.5
Poland	39.5	60.5
Portugal	33.7	66.3
Spain	31.6	68.4
Switzerland	37.4	62.6
UK	39.9	60.1

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N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each item are displayed.

Providers have the highest perceptions of **ride-hailing platforms** as primarily software companies.

	Providers	Consumers	Aware Non-Users
They are primarily transportation companies.	51.10	63.60	69.40
They are primarily software companies.	48.90	36.40	30.60

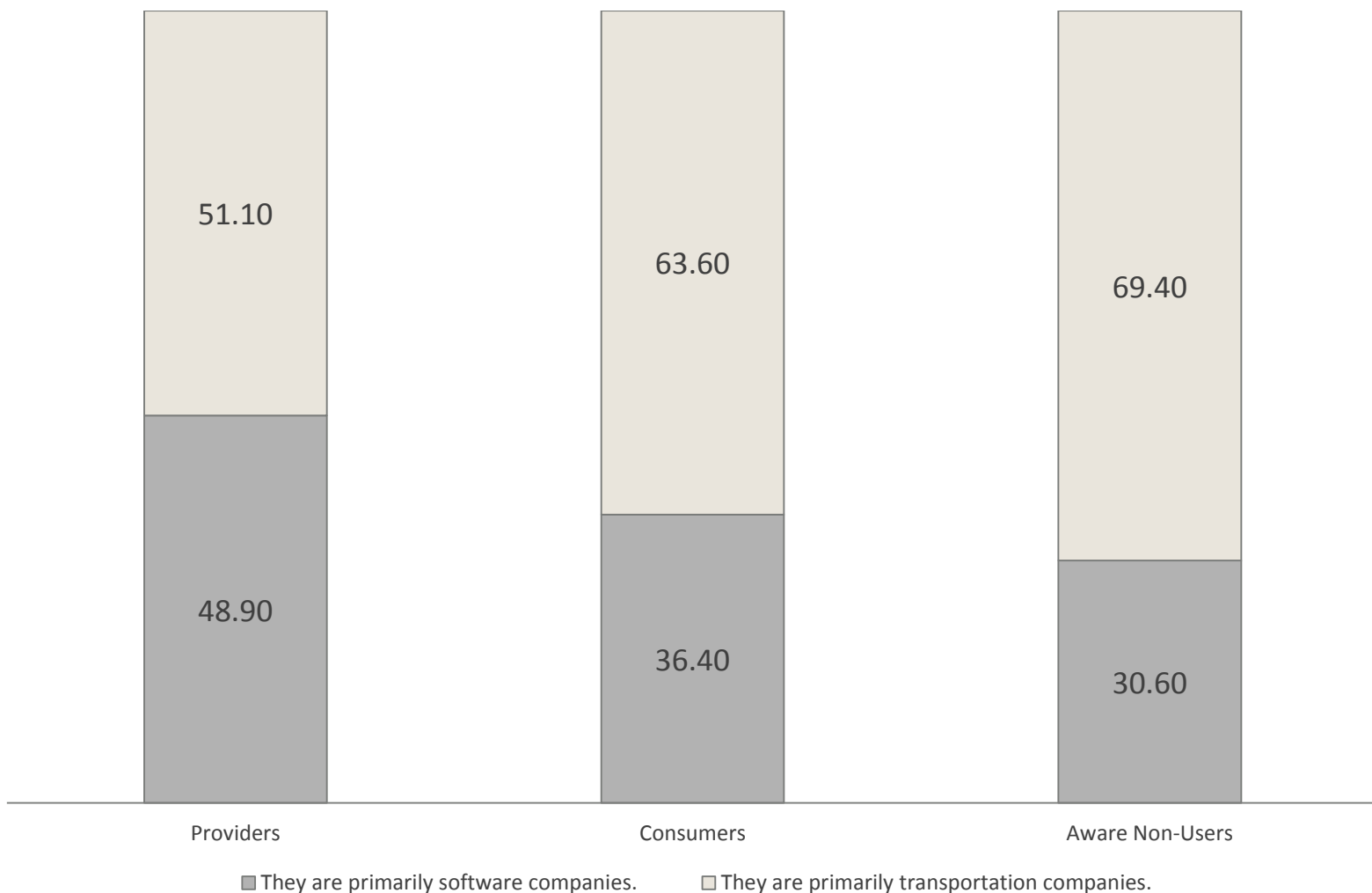■ They are primarily software companies.   ■ They are primarily transportation companies.
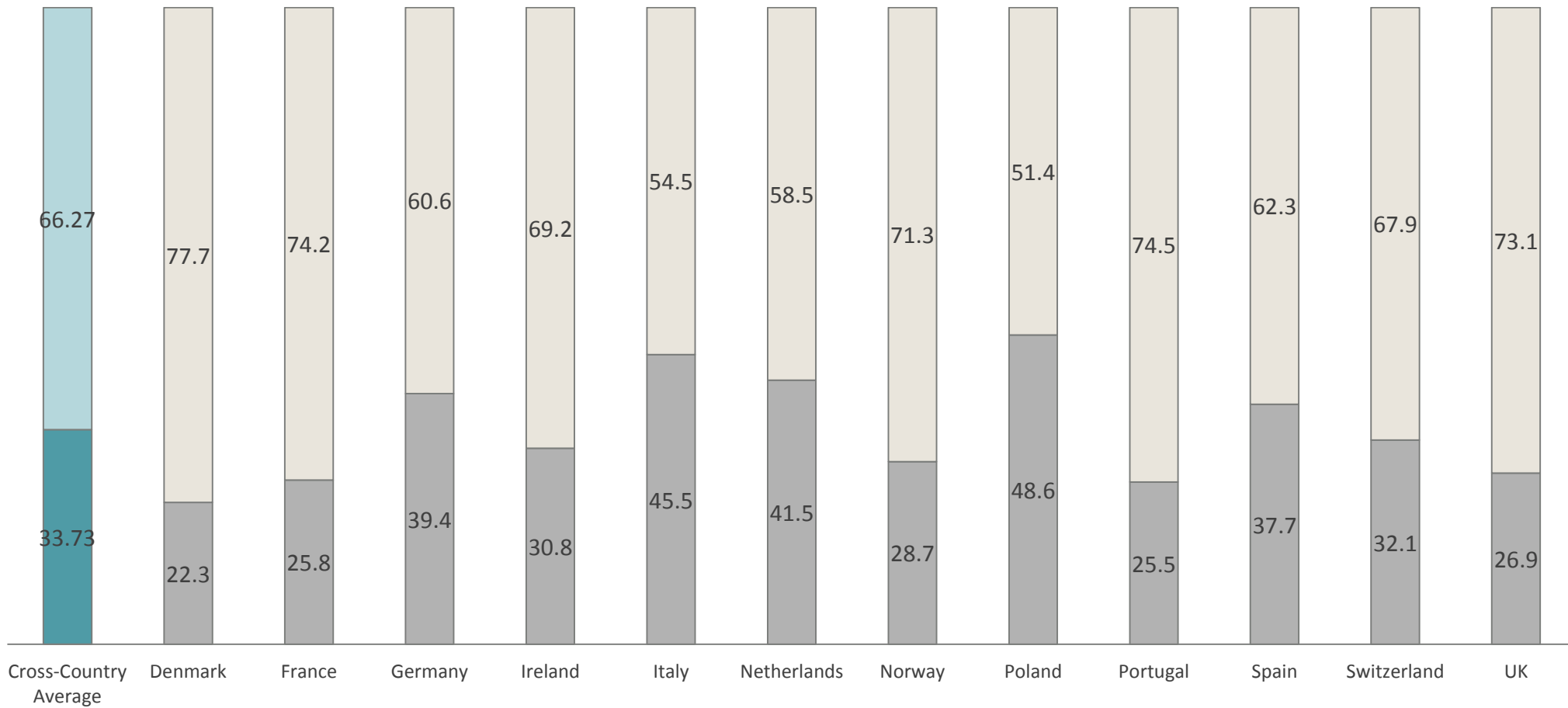
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N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each country are displayed. Respondents were asked "Which statement best describes your view of ride-hailing platforms like Uber?"

".

Polish and Italian respondents have the highest perceptions of ride-hailing platforms as primarily software companies.
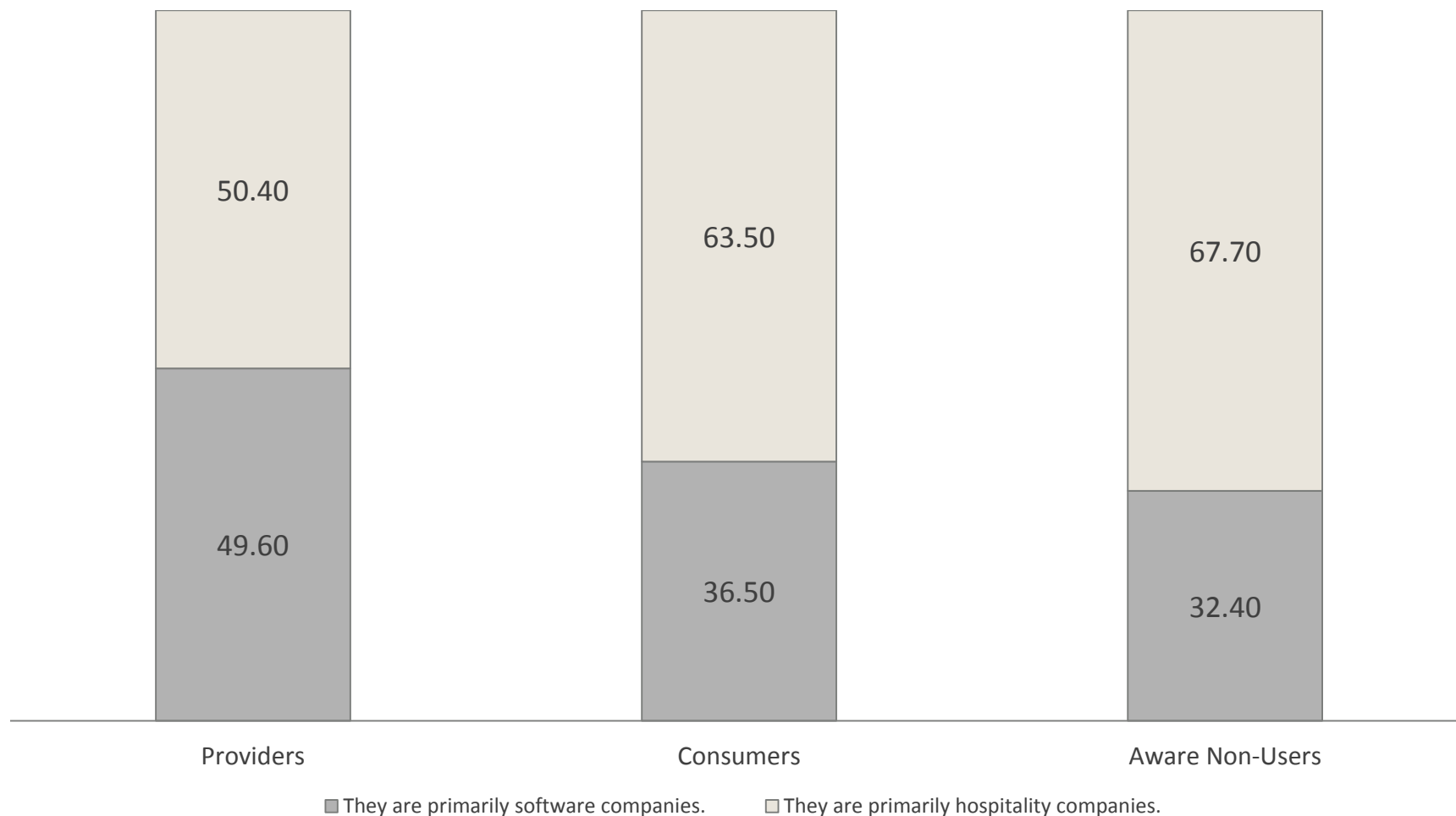

	Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
They are primarily transportation companies.	66.27	77.7	74.2	60.6	69.2	54.5	58.5	71.3	51.4	74.5	62.3	67.9	73.1
They are primarily software companies.	33.73	22.3	25.8	39.4	30.8	45.5	41.5	28.7	48.6	25.5	37.7	32.1	26.9

■ They are primarily software companies.   ■ They are primarily transportation companies.

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each country are displayed. Respondents were asked "Which statement best describes your view of ride-hailing platforms like Uber?"
"

Men have the highest perceptions of ride-hailing platforms as primarily software companies.

70.2

62.6

29.8

37.4

Female

Male

☐ They are primarily software companies.   ☐ They are primarily transportation companies.

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each group are displayed. Respondents were asked "Which statement best describes your view of ride-hailing platforms like Uber?"
"*.*

Providers have the highest perceptions of view home-sharing platforms as primarily software companies.

	Providers	Consumers	Aware Non-Users
They are primarily hospitality companies.	50.40	63.50	67.70
They are primarily software companies.	49.60	36.50	32.40

◻ They are primarily software companies.   ◻ They are primarily hospitality companies.

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N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each group are displayed. Respondents were asked "Which statement best describes your view of home-sharing platforms like Airbnb?".

Polish respondents have the highest perceptions of home-sharing platforms as primarily software companies.

	Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
They are primarily hospitality companies.	64.02	70	74	62.2	71.9	59.7	61.3	62.9	49.9	69.8	59.9	64.4	73.1
They are primarily software companies.	35.08	30	26	37.8	28.1	40.3	38.7	37.1	50.1	30.2	40.1	35.6	26.9

■ They are primarily software companies.   ■ They are primarily hospitality companies.

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N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each country are displayed. Respondents were asked "Which statement best describes your view of home-sharing platforms like Airbnb?".

Men have the highest perceptions of home-sharing platforms as primarily software companies.

	Female	Male
They are primarily hospitality companies.	69.9	60.2
They are primarily software companies.	30.1	39.8

■ They are primarily software companies.   ■ They are primarily hospitality companies.

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Key Insights on Narratives

- A two third majority sees providers as **independent contractors**.

- The proportion of **providers** who see themselves as employees – rather than indpendent contractors – is higher than the proportion of consumers and aware non-users who see providers as employees.

- Respondents in **Norway, the UK, and Denmark** see providers more as employees than respondents in other countries.

- A one third minority sees ride-hailing and home-sharing platforms as **software companies**, a two third majority as **transport** and **hospitality companies**.

11

Regulating the Sharing Economy

A lack of clarity over service legality leaves users vulnerable

Regulating the Sharing Economy

The novel nature of sharing economy platforms, in addition to their frequently trans-national nature, has created a scattered regulatory backdrop against which companies have been able to expand with varied levels of resistance and compliance.

Three quarters of Europeans think that sharing economy companies should **follow the same rules and regulations** as established companies.
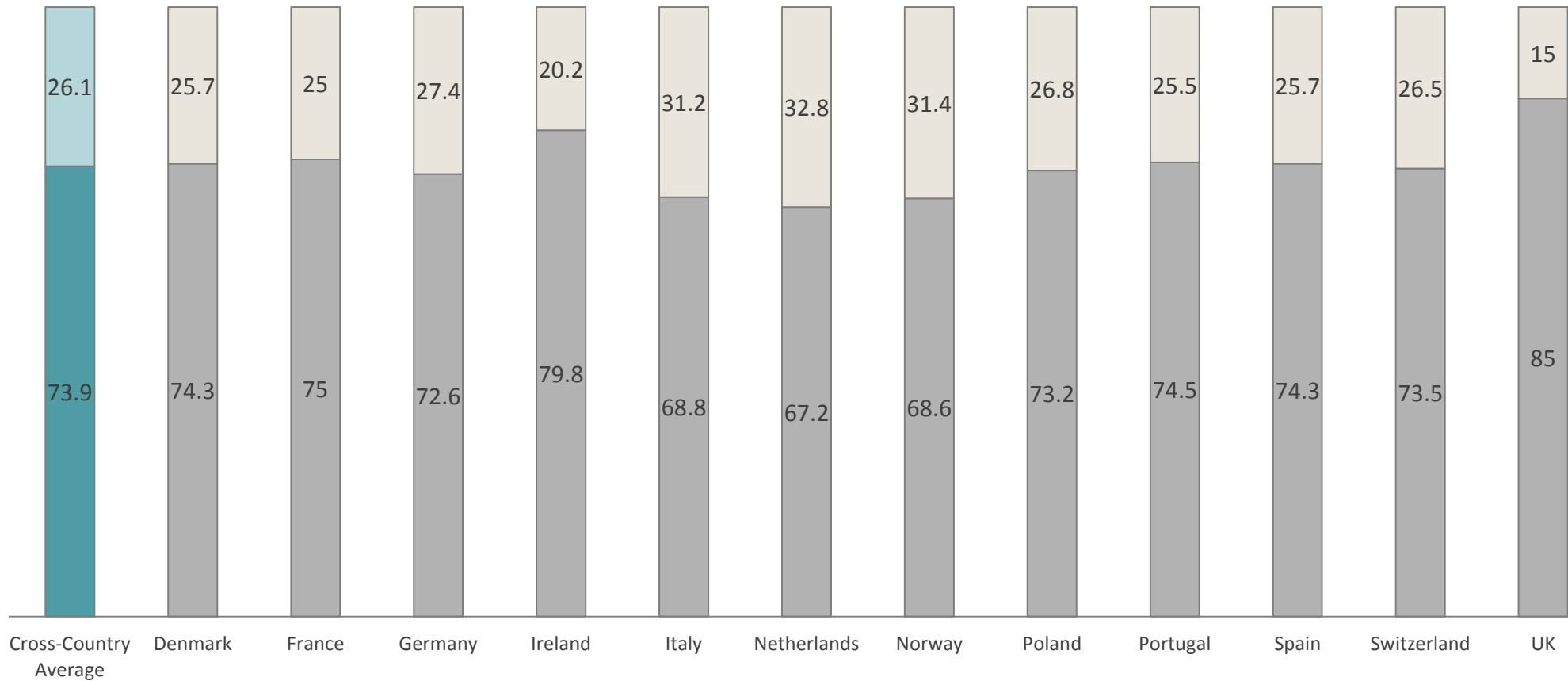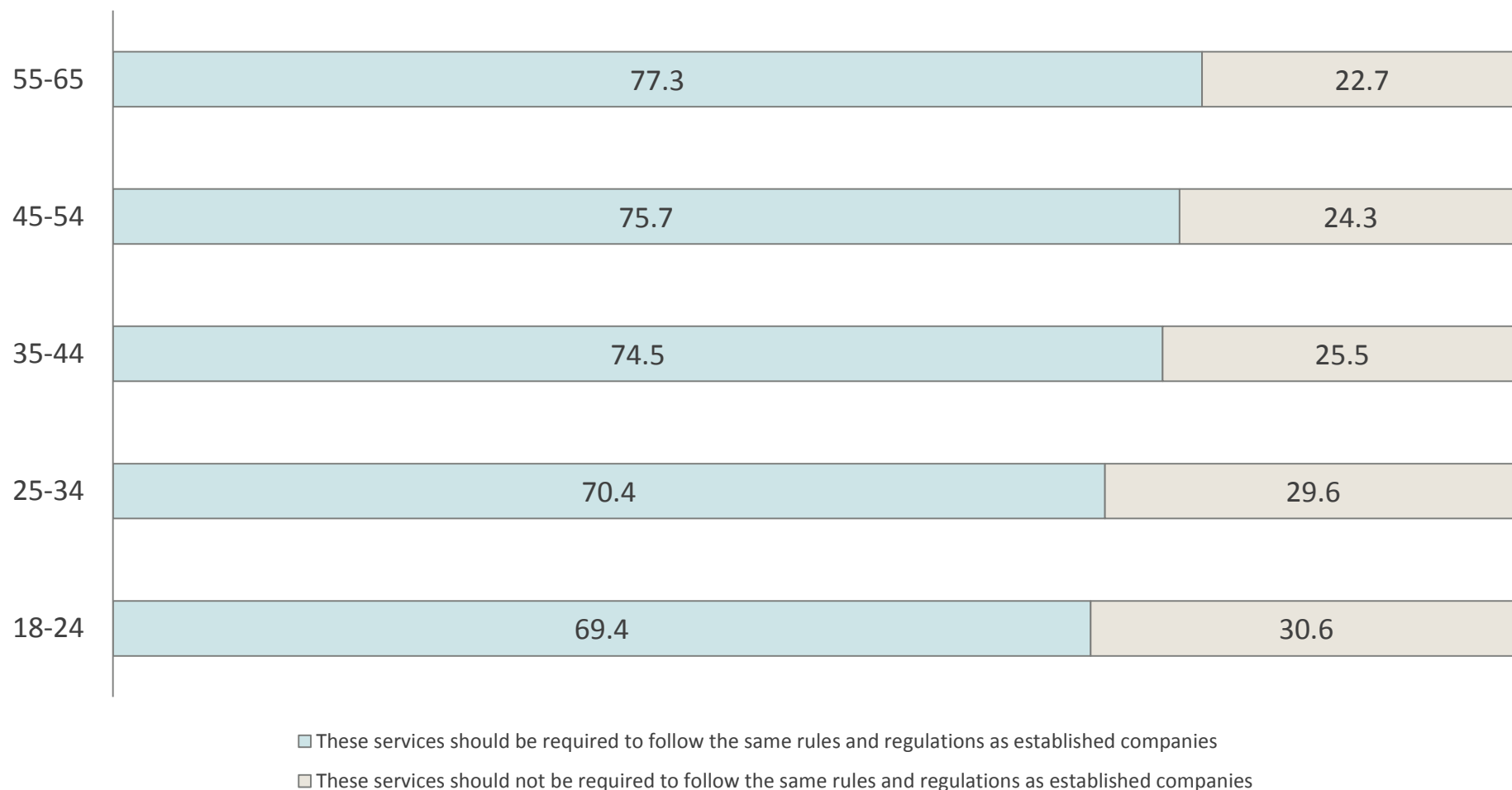

	Cross-Country Average	Denmark	France	Germany	Ireland	Italy	Netherlands	Norway	Poland	Portugal	Spain	Switzerland	UK
Not required	26.1	25.7	25	27.4	20.2	31.2	32.8	31.4	26.8	25.5	25.7	26.5	15
Required	73.9	74.3	75	72.6	79.8	68.8	67.2	68.6	73.2	74.5	74.3	73.5	85

☐ These services should not be required to follow the same rules and regulations as established companies

☐ These services should be required to follow the same rules and regulations as established companies

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N = 6111 Consumers, Providers, Aware Non-Users and Non-Aware Non-Users; Percentages for each item are displayed.

Providers are the most supportive of sharing platforms **not following the same rules and regulations** as established companies.

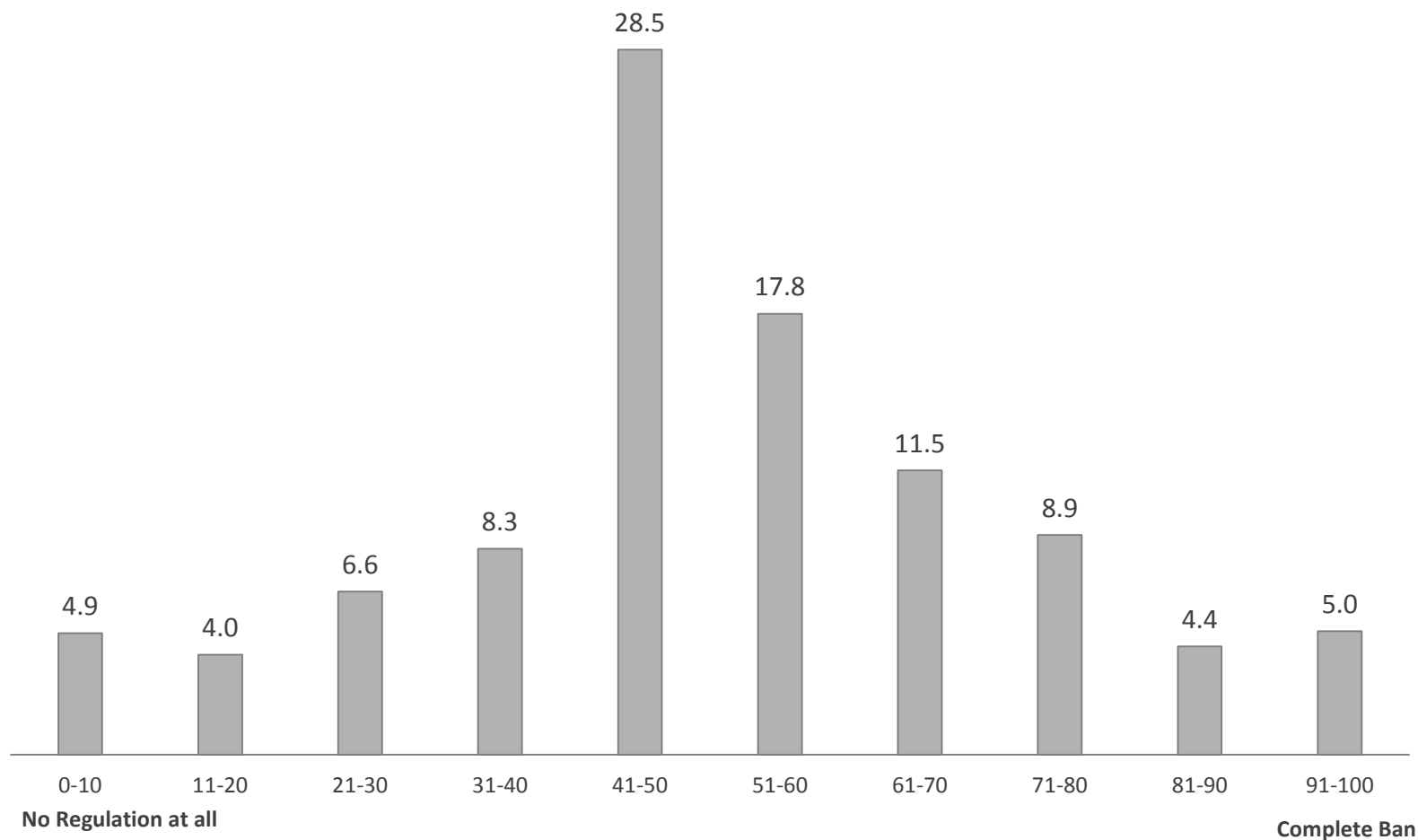|	These services should be required to follow the same rules and regulations as established companies	These services should not be required to follow the same rules and regulations as established companies
Non Aware Non-Users	70.50	29.50
Aware Non-Users	76.80	23.20
Consumers	70.20	29.80
Providers	65.10	34.90

☐ These services should be required to follow the same rules and regulations as established companies

☐ These services should not be required to follow the same rules and regulations as established companies

N = 6111 Consumers, Providers, Aware Non-Users and Non-Aware Non-Users; Percentages for each item are displayed.

Younger Europeans are **more supportive** of platforms not following the same rules and regulations than older Europeans.
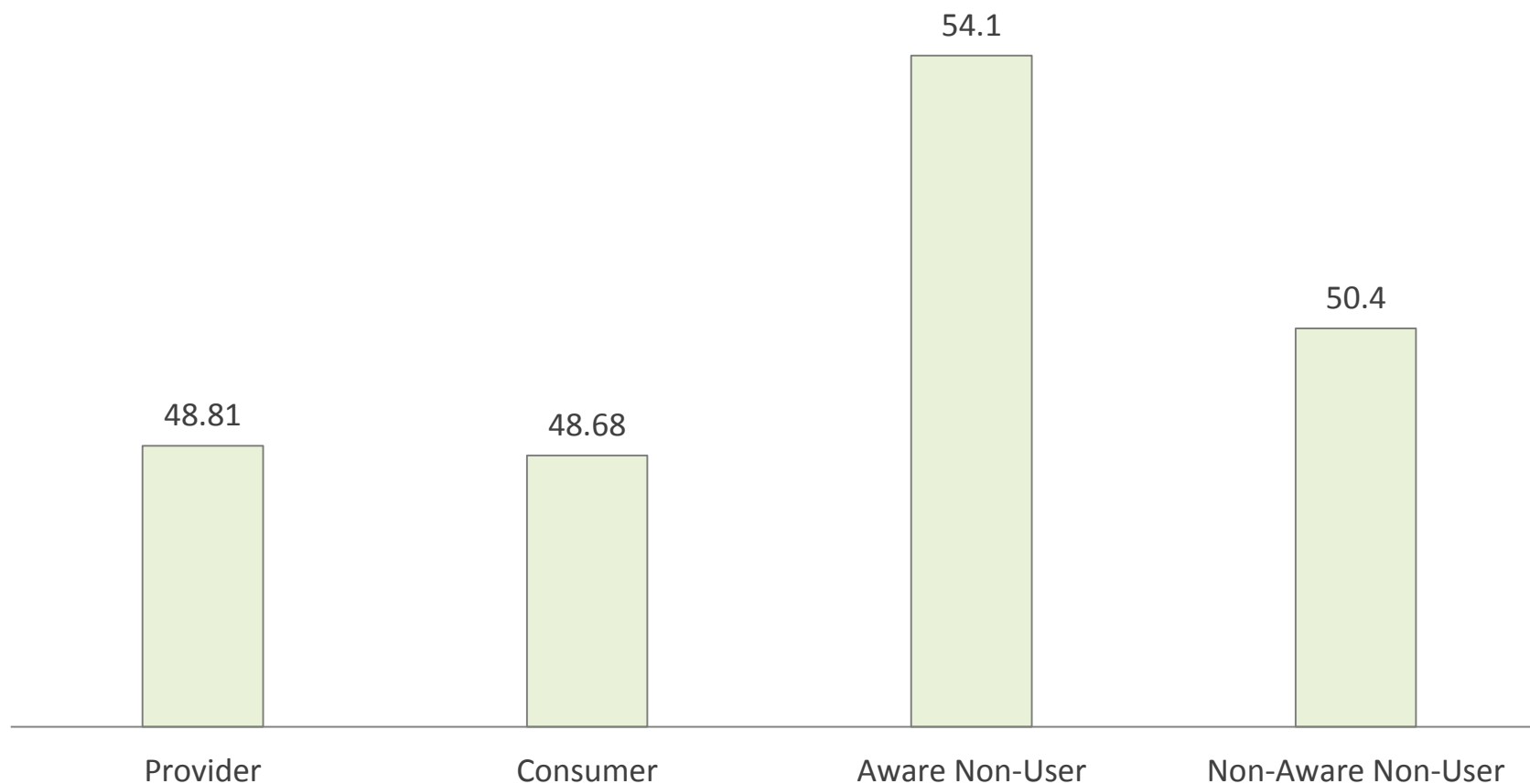
Age	Follow same rules	Not follow same rules
55-65	77.3	22.7
45-54	75.7	24.3
35-44	74.5	25.5
25-34	70.4	29.6
18-24	69.4	30.6

☐ These services should be required to follow the same rules and regulations as established companies

☐ These services should not be required to follow the same rules and regulations as established companies

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N = 6111 Consumers, Providers, Aware Non-Users and Non-Aware Non-Users; Percentages for each item are displayed.

Uber users are more supportive of platforms following the same rules and regulations as established companies.

	These services should be required to follow	These services should not be required to follow
Uber	75.6	24.4
BlaBlaCar	61.6	38.4
Airbnb	64	36

☐ These services should be required to follow the same rules and regulations as established companies

☐ These services should not be required to follow the same rules and regulations as established companies

N = 1253 Consumers and Providers; Percentages for each item are displayed.

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Respondents prefer **moderate regulation of the sharing economy**. Only a small minority wants no regulation at all or a complete ban.

28.5
17.8
11.5
8.3
8.9
6.6
4.9
4.0
4.4
5.0

| 0-10 | 11-20 | 21-30 | 31-40 | 41-50 | 51-60 | 61-70 | 71-80 | 81-90 | 91-100 |

No Regulation at all

Complete Ban

N = 5517 Consumers, Providers and Aware Non-Users; Percentages for each country are displayed. Respondents were asked "How much regulation should there be towards the sharing economy? 0 means no regulation at all and 100 means a complete ban."

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Aware Non-Users want most regulation and **Consumers** want the least regulation.

N = 6111 Consumers, Providers, Aware Non-Users and Non-Aware Non-Users; Percentages for each item are displayed. Respondents were asked "How much regulation should there be towards the sharing economy? 0 means no regulation at all and 100 means a complete ban."

Uber users want most regulation and **BlaBlaCar** users want the least regulation.
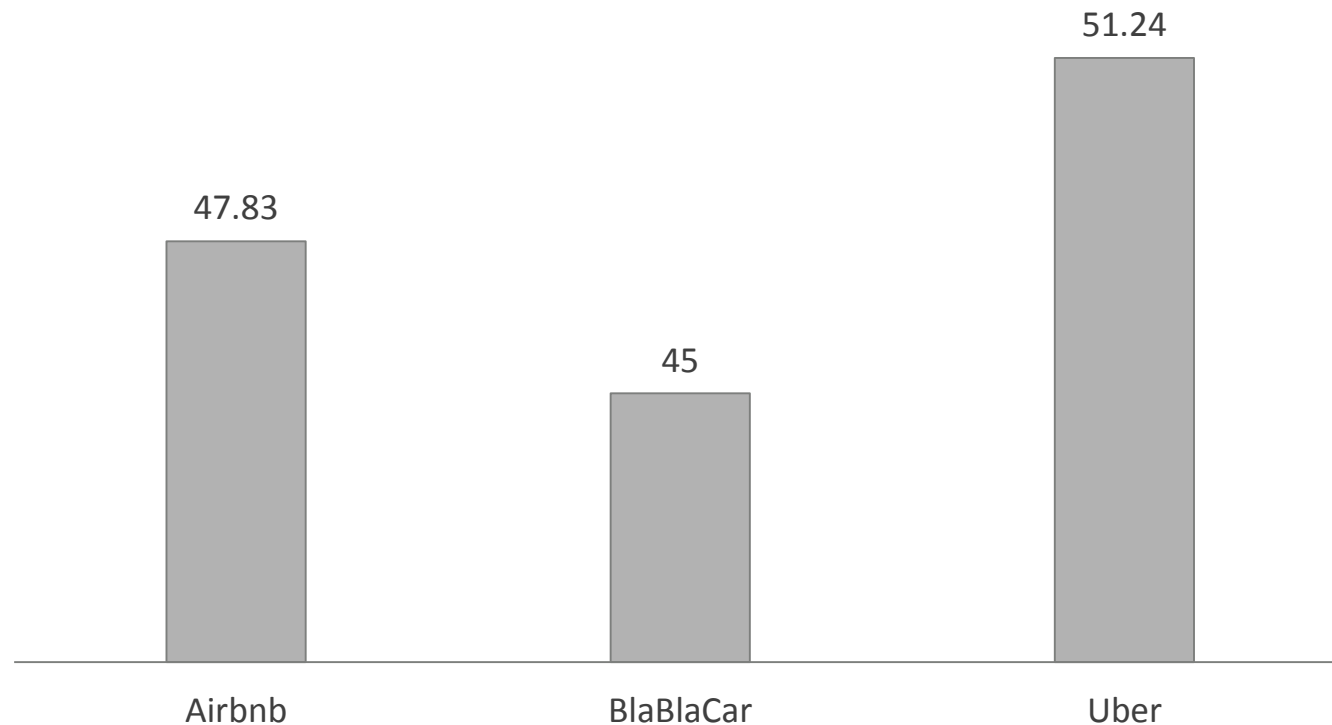
N = 1253 Consumers and Providers; Percentages for each item are displayed. Respondents were asked "How much regulation should there be towards the sharing economy? 0 means no regulation at all and 100 means a complete ban".

Key Insights on Regulation

- Three quarters of respondents think that **sharing platforms should follow the same rules and regulations as established companies**.

- Respondents opt for a **middle ground in regulation**, between laissez-faire and a complete ban.

- **Uber drivers** are more in favor of equal treatment of sharing platforms and established companies than BlaBlaCar drivers and Airbnb hosts.

- **Aware non-users** want most regulation, consumers want the least.

- **Younger respondents** are more supportive of special rules and regulations for the sharing economy compared with older respondents.

12 Conclusions

Summary of Results

Providers and Consumers report different power-related attitudes and behaviors.

There are pronounced **country differences** in power aspects.

Platforms partly differ in how they are perceived in terms of power aspects.

Consumers report better **interpersonal treatment** than providers and equal levels of **emotional labor**. They also perceive the **rating/review system** more favourably.

Providers assign more **responsibility to themselves** and to platforms for solving problems. Consumers see more **shared responsibility** between providers and platforms.

Consumers want the **least regulation** of sharing economy companies of all respondents,

In some regards, especially with regards to peer-to-peer aspects, there is a North-South difference, with southern European countries reporting **higher levels of emotional labor** and interpersonal treatment.

Dutch users **support unionization the least** among all countries. They also have the weakest conceptualization of providers as employees.

Norwegian users view the pricing policies and rating/review systems as the least fair.

Uber drivers feel the **most pressure to provide** more often than they would like to.

Uber's **terms and conditions** are also assessed as being worse than those of Airbnb and BlaBlaCar.

Uber drivers see themselves more **as employees** than Airbnb hosts and BlaBlaCar drivers. They use **online communities most** and desire most regulation.

thank you for
your consideration

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