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Survey Results

Participation in the Sharing Economy

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Executive Summary

Participation Divide

Only a **minority of Europeans** (27.8%) participate in the sharing economy. Participants are notably younger and of higher socio-economic status than non-participants. Sharing, thereby, is still an **elite phenomenon**.

Digital Divide

Participants are significantly more avid and skilled Internet users than non-participants, particularly in terms of **mobile Internet use**. **Internet access and use**, thereby, is a key challenge for the development of the sharing economy.

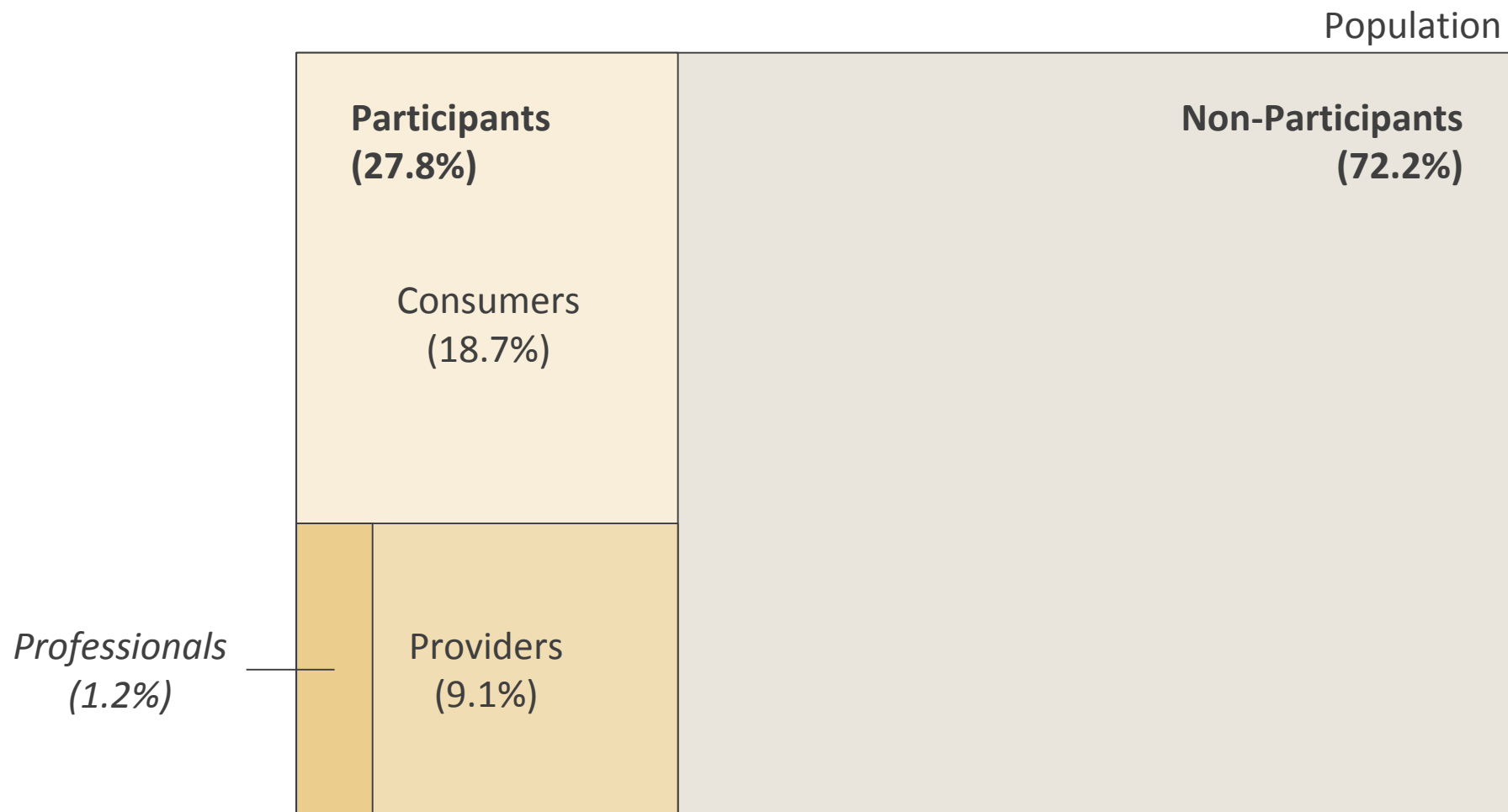
Engagement Divide

Comparing those participating as either consumers or providers, we find **providers** to be somewhat **younger, of lower socio-economic status and more frequently male** than consumers. **Consumers** are drawn to sharing by **savings** primarily, but also by **fun** – providers have a more varied set of reasons to participate.

Provider Divide

There are some noticeable differences between those **providing professionally or occasionally**. **Professional sharing** occurs mostly in **car-sharing**, with providers being predominantly **younger, male and lower SES** participants. Occasional sharers, instead, are of higher SES. About **half of providers** consider sharing just a **convenient side-income**.

Executive Summary



1

Introduction: Participation in the Sharing Economy

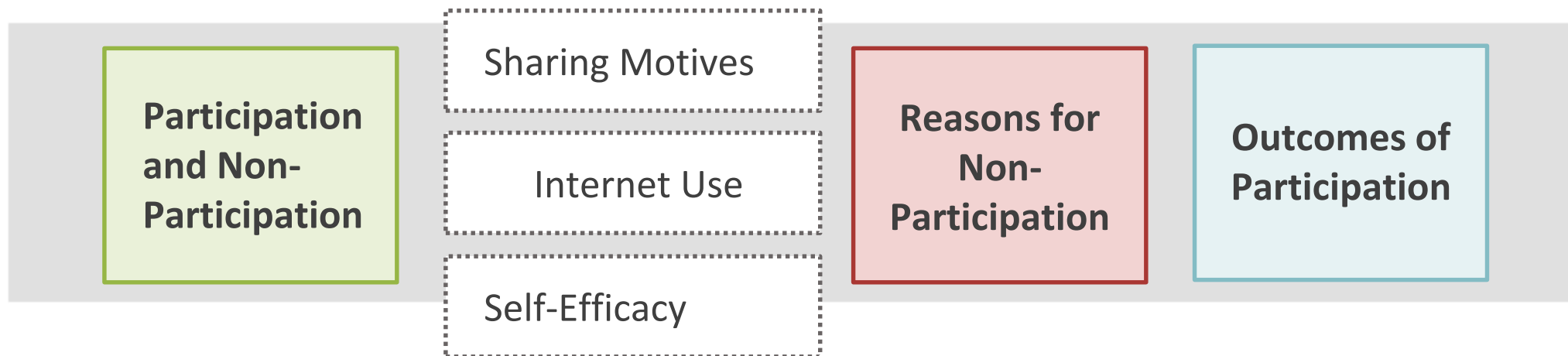
Differentiating awareness and levels of
engagement



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Overview of the Report



We differentiate **participation** from non-participation as well as **levels or forms of participation**. Based on a divides-model, we analyse key antecedents: **motives**, **access** and **skills/capabilities**. Finally we differentiate rationales for non-participation and explore **outcomes** for those who do participate.

2 Participation and Non-Participation in the Sharing Economy

Socioeconomic and skills differences between providers, consumers and abstainers



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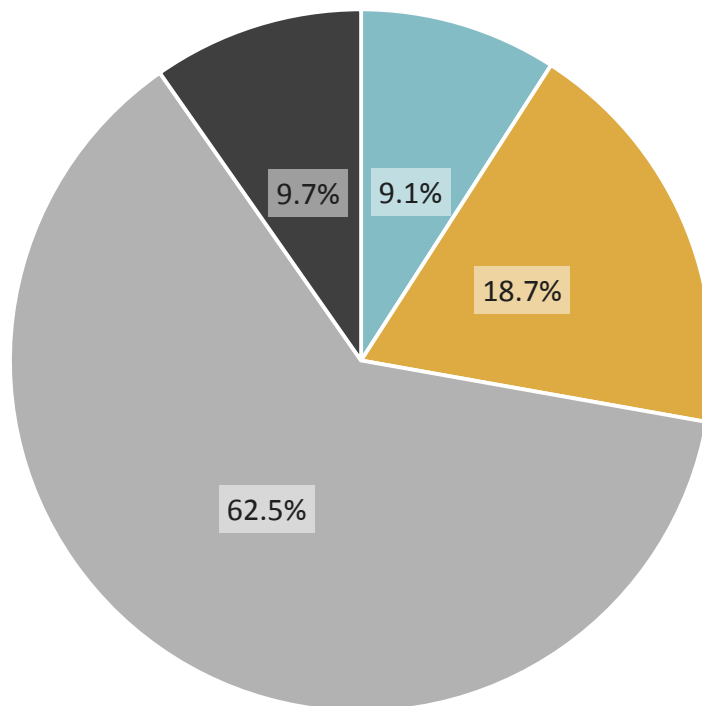
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A person with long, dark brown hair is seen from behind, standing in a hallway. The person is wearing a light blue denim shirt. The hallway has a blue door on the left and a red door on the right, both slightly out of focus. The person is looking towards a white door in the distance.

Sharing Participation is an Elite Phenomenon

Participants are younger, more educated, higher-income and have more Internet skills than non-participants. There is a participation divide in the sharing economy.

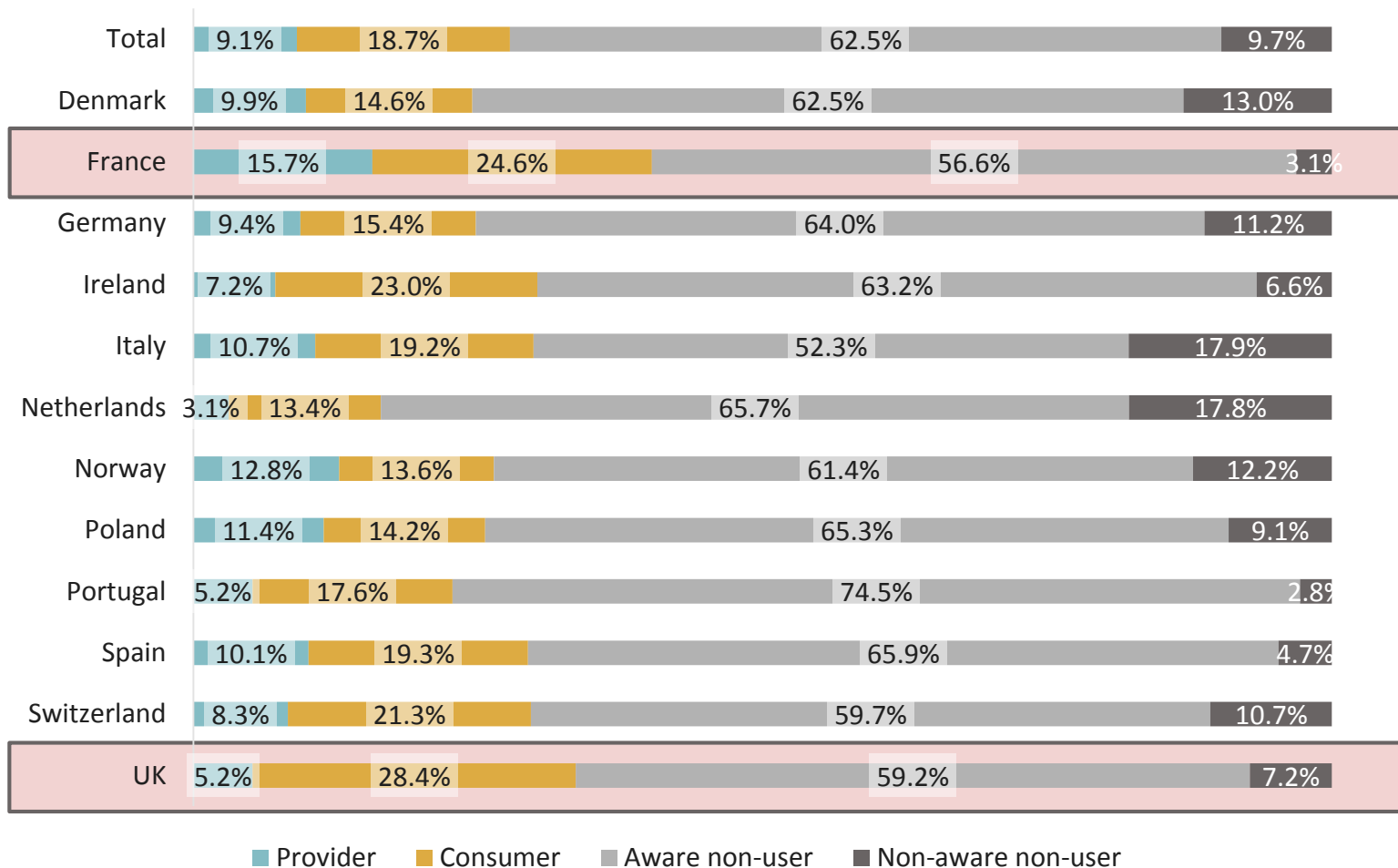
Majority of Europeans familiar with sharing economy – but not participating



■ Provider ■ Consumer ■ Aware non-user ■ Non-aware non-user

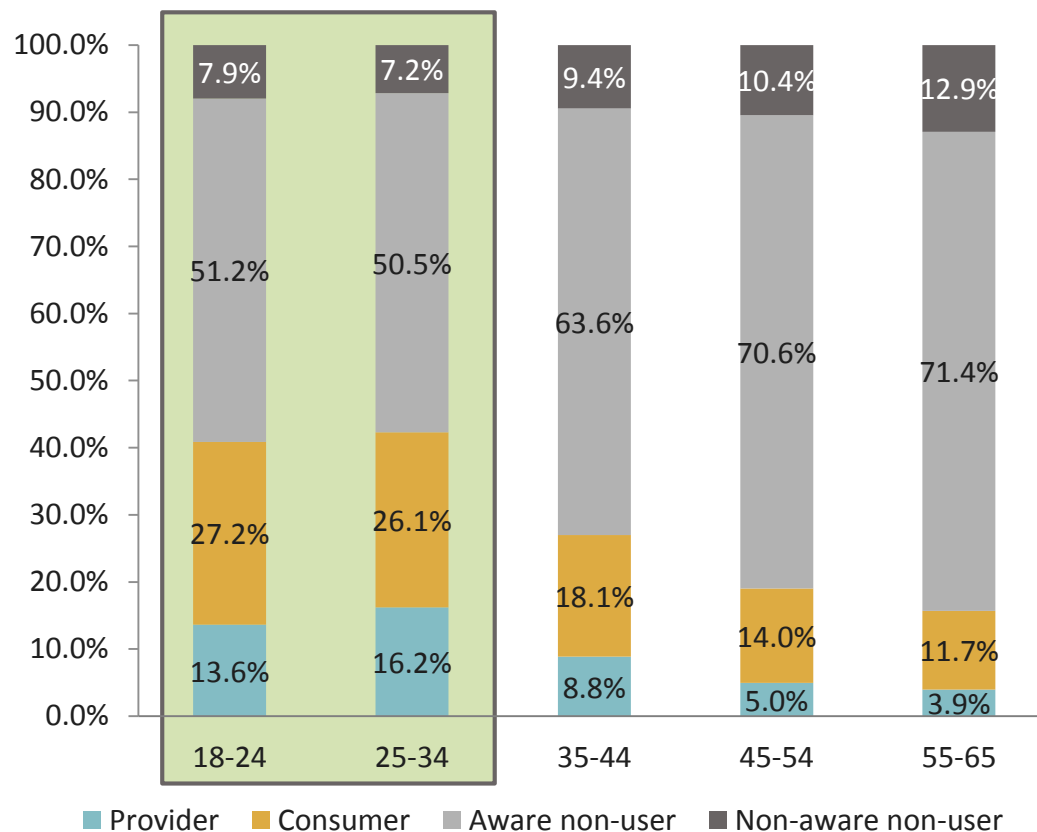
N = 6111 Users and Non-Users (categorized as Providers, Consumers, Aware and Non-aware non-users)

France and UK leading in sharing participation



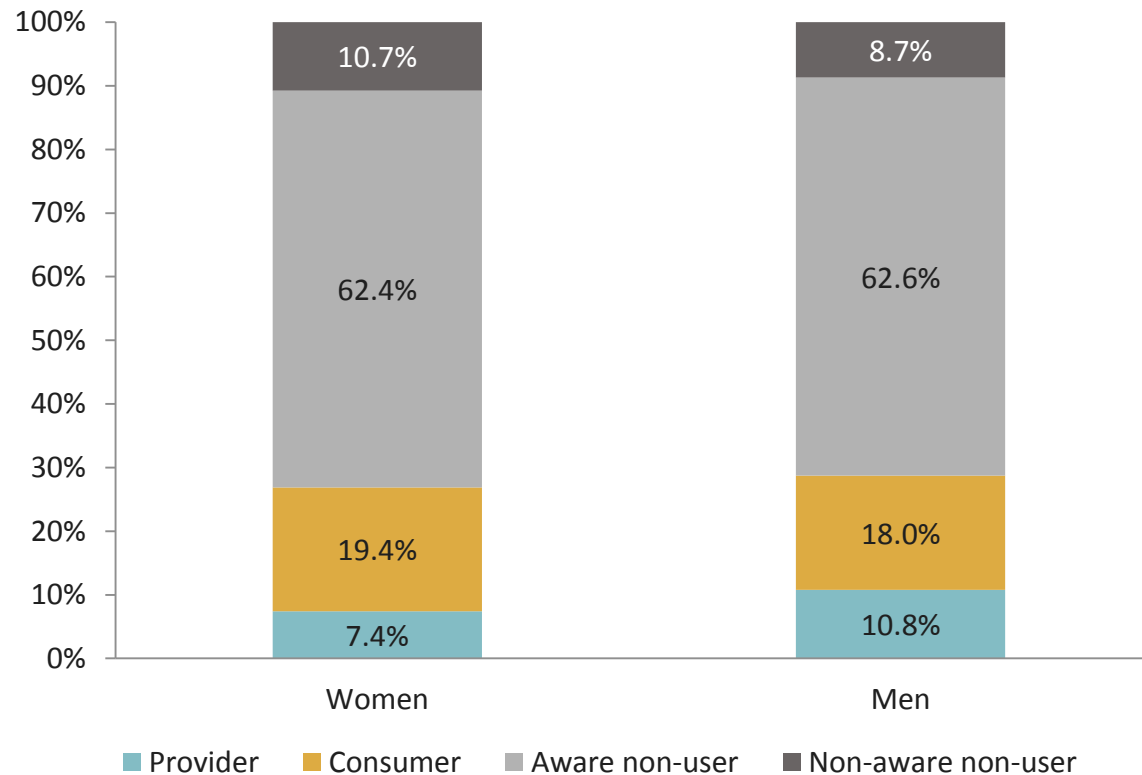
N = 6111 Users; Distribution of classification for each country is displayed

Active participants tend to be younger



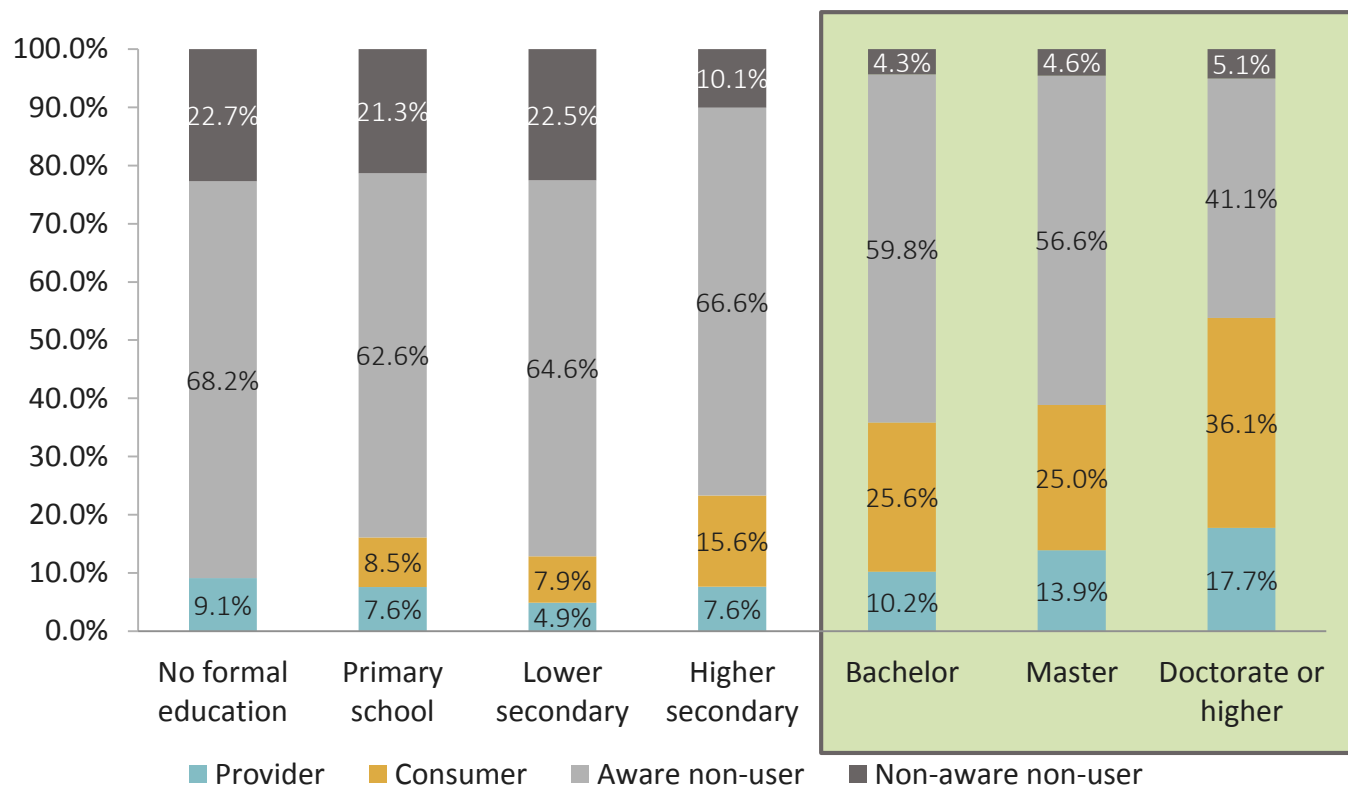
N = 6111; Distribution of Provider, Consumer, Non-Users (Aware and Unaware) in different age groups is displayed

Men provide more frequently than women



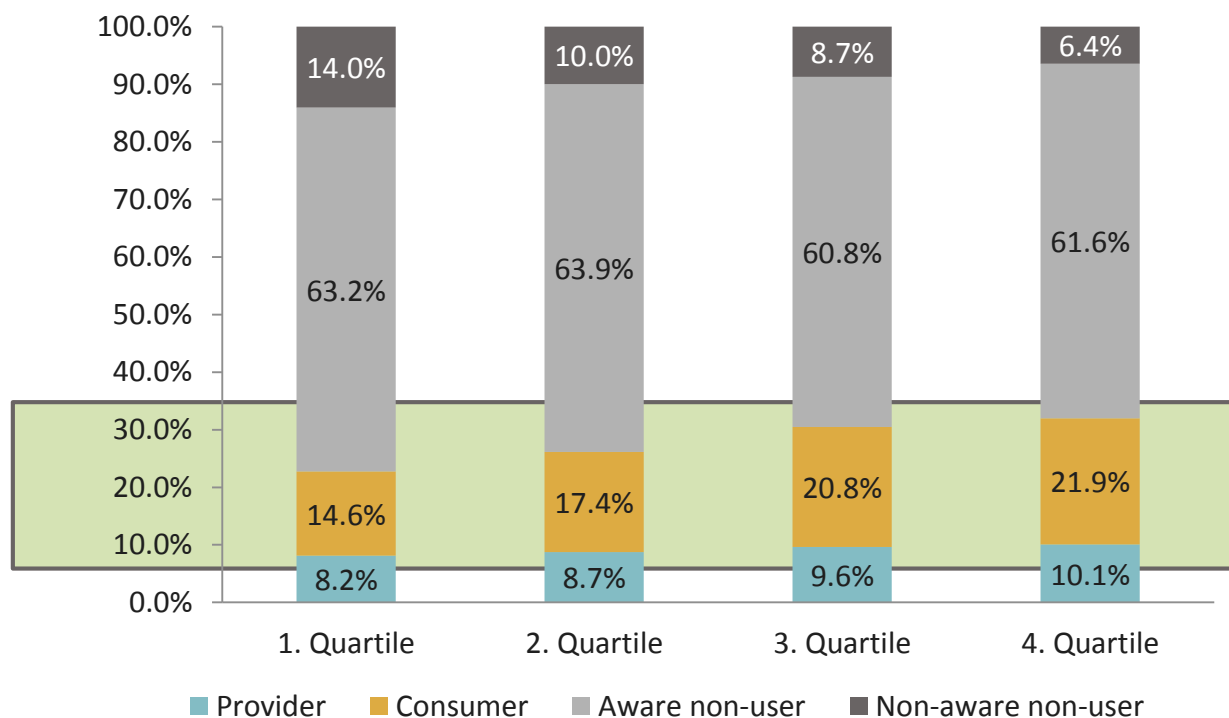
N = 6111; Distribution of Provider, Consumer, Non-Users (Aware and Unaware) between men and women is displayed

Consumption particularly common among highly educated individuals



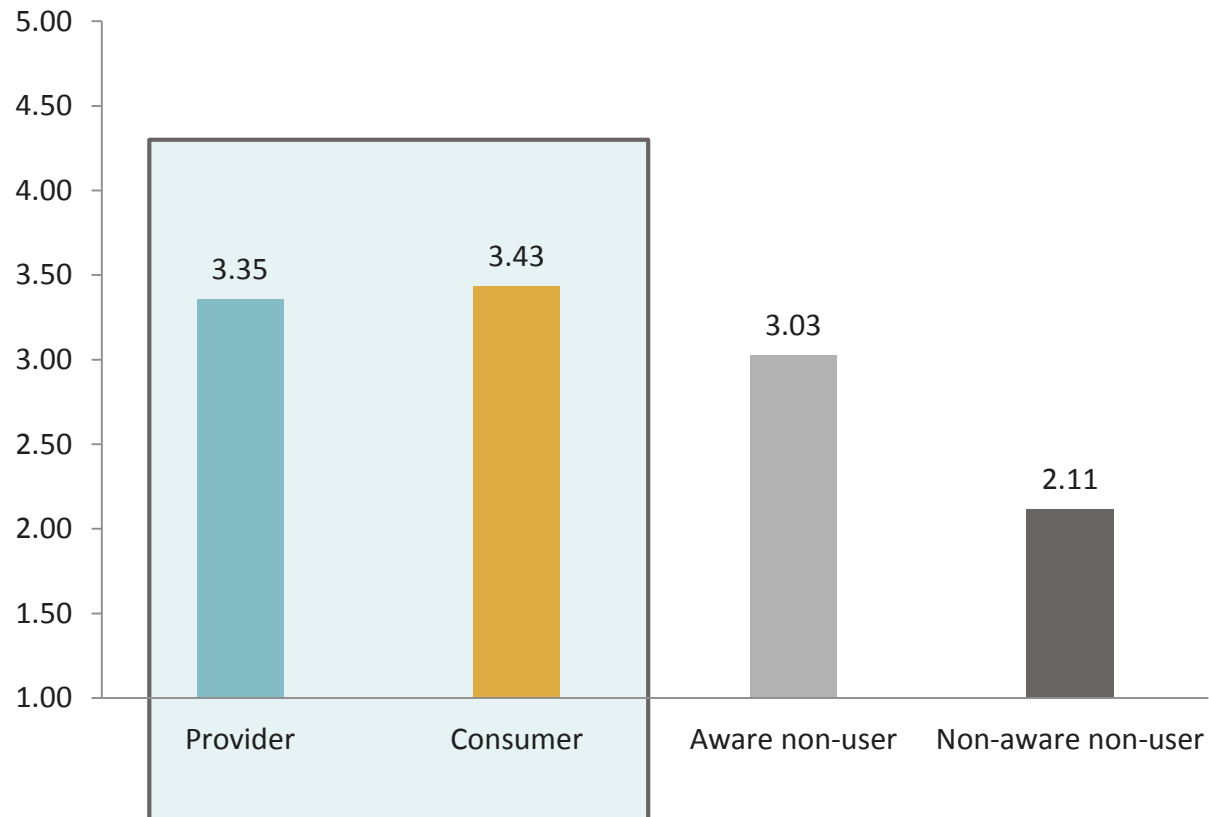
N = 6111; Distribution of Provider, Consumer, Non-Users (Aware and Unaware) in different levels of education is displayed

Consumption more common among higher-income individuals



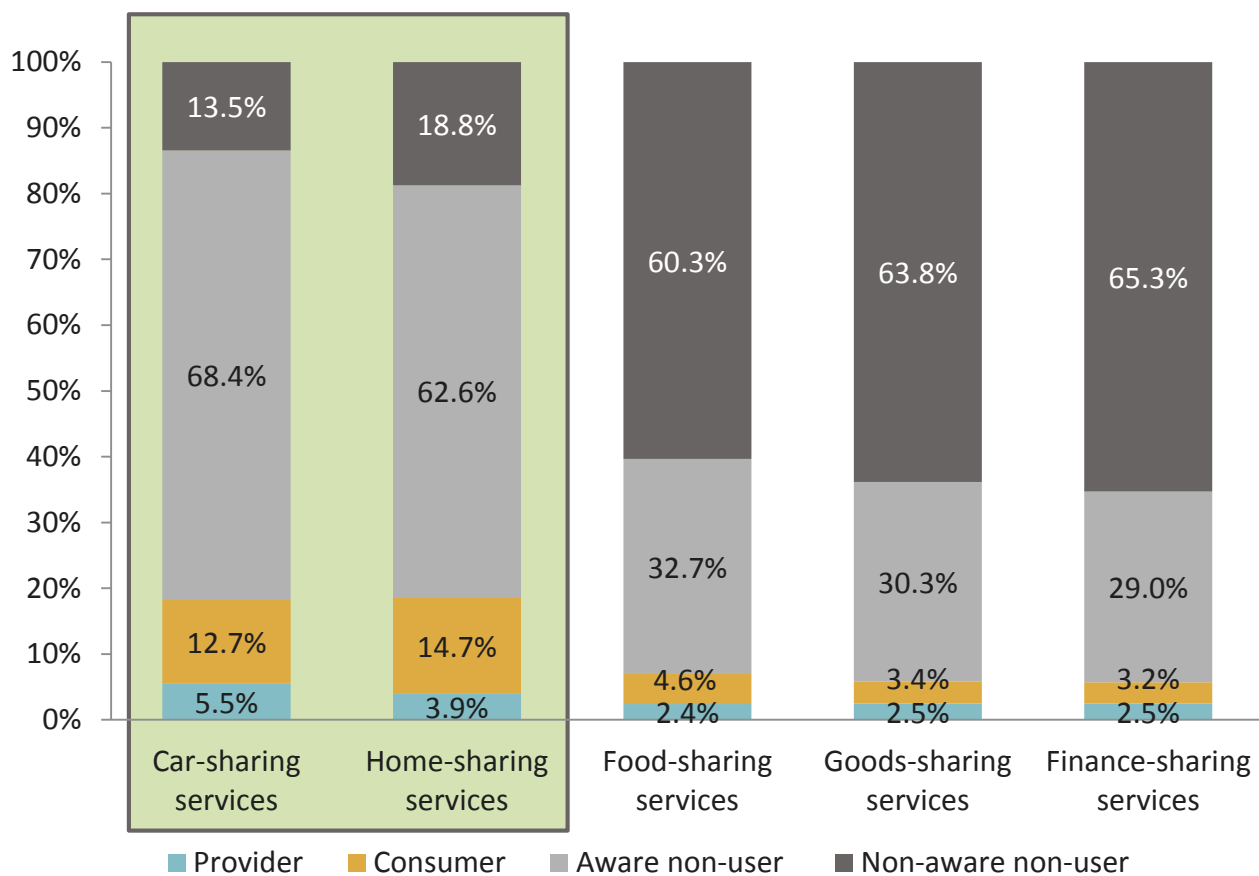
*N = 6111; Distribution of Provider, Consumer, Non-Users (Aware and Unaware) in different income levels is displayed
Quartiles cut the distribution of income in approximately even quarters
(e.g. first quartile represents the lowest 25% of the income distribution)*

Non-participants have lower Internet skills







*N = 6111; Arithmetic means are displayed
Internet skills: 1-5 scale with 1-very low, 2-low, 3-average, 4-high, 5-very high*

The sharing economy is dominated by car- and home-sharing







N = 6111; Distribution of user types in different services is displayed





Car-sharing most common in UK, home-sharing in France

		<i>In percent</i>	Provider	Consumer	Aware Non-User	Non-Aware
	Denmark	Car-sharing	4.7%	10.1%	65.8%	19.4%
		Home-sharing	5.9%	12.8%	58.5%	22.7%
		Food-sharing	2.8%	6.1%	23.3%	67.8%
		Goods-sharing	3.2%	4.9%	23.7%	68.2%
		Finance-sharing	3.0%	4.5%	19.6%	72.9%
	France	Car-sharing	13.4%	16.1%	66.8%	3.7%
		Home-sharing	3.3%	24.8%	64.4%	7.5%
		Food-sharing	1.2%	1.2%	26.3%	71.3%
		Goods-sharing	1.4%	1.4%	30.1%	67.2%
		Finance-sharing	1.2%	1.4%	28.3%	69.2%
	Germany	Car-sharing	6.2%	10.4%	70.4%	13.0%
		Home-sharing	3.8%	8.2%	70.4%	17.6%
		Food-sharing	3.4%	4.2%	42.4%	50.0%
		Goods-sharing	2.8%	2.2%	41.8%	53.2%
		Finance-sharing	3.2%	2.6%	49.4%	44.8%
	Ireland	Car-sharing	3.0%	12.6%	68%	16.4%
		Home-sharing	5.0%	19.2%	65.2%	10.6%
		Food-sharing	3.0%	5.6%	29.2%	62.2%
		Goods-sharing	2.8%	3.2%	22.6%	71.4%
		Finance-sharing	2.4%	3.4%	23.0%	71.2%

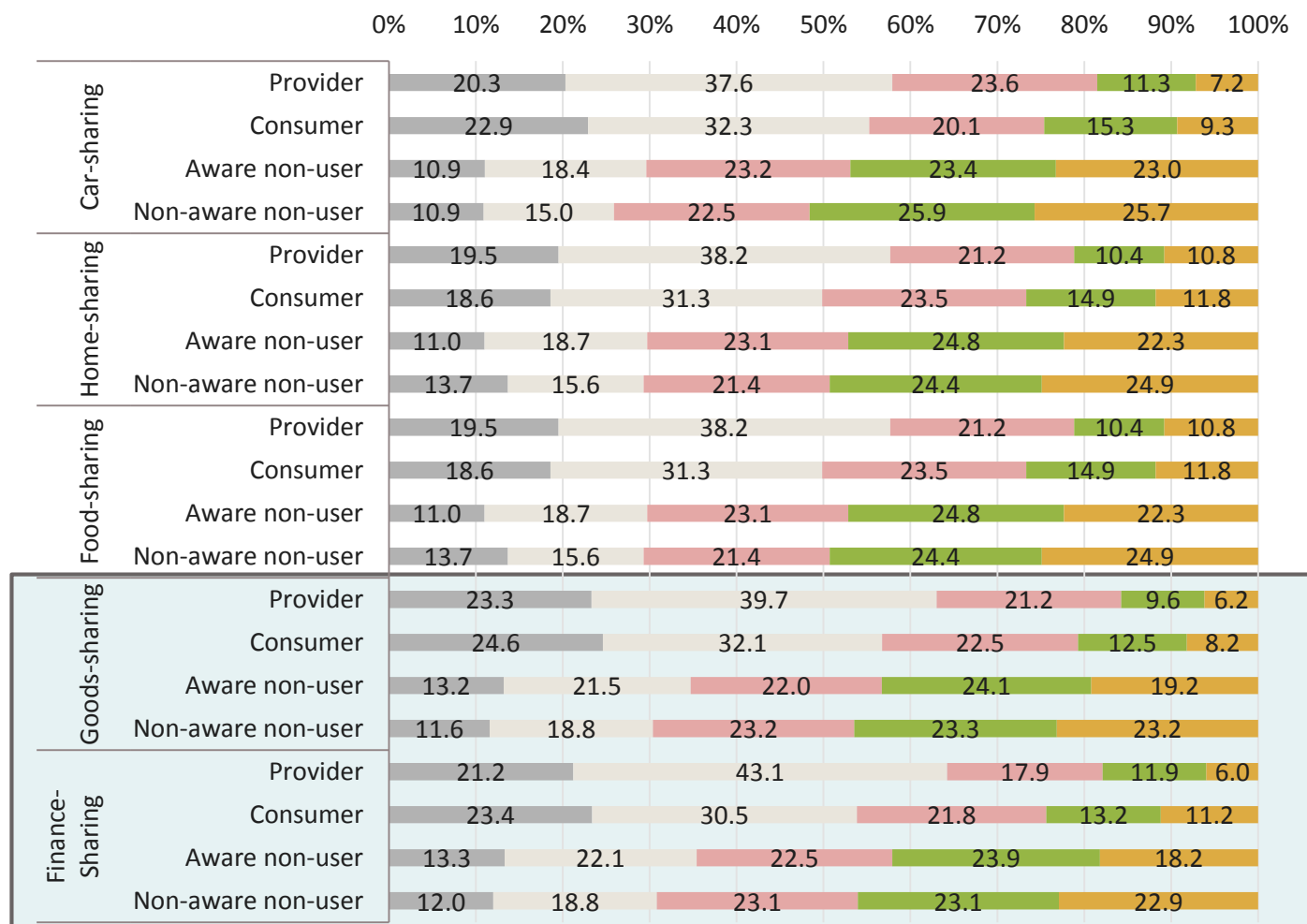
(continued)

		<i>In percent</i>	Provider	Consumer	Aware Non-User	Non-Aware
	Italy	Car-sharing	6.0%	12.8%	61.8%	19.4%
		Home-sharing	6.2%	16.5%	48.9%	28.4%
		Food-sharing	2.6%	6.4%	41.2%	49.8%
		Goods-sharing	2.8%	3.8%	30.6%	62.8%
		Finance-sharing	2.8%	4.7%	28.6%	63.9%
	Netherlands	Car-sharing	1.6%	4.5%	67.4%	26.6%
		Home-sharing	1.4%	11.6%	64.3%	22.7%
		Food-sharing	0.6%	1.4%	39.0%	59.1%
		Goods-sharing	1.6%	2.1%	38.8%	57.6%
		Finance-sharing	0.8%	1.6%	21.9%	75.8%
	Norway	Car-sharing	6.8%	10.4%	66.0%	16.8%
		Home-sharing	7.4%	12.2%	58.6%	21.8%
		Food-sharing	4.2%	7.2%	31.4%	57.2%
		Goods-sharing	3.8%	6.0%	27.6%	62.6%
		Finance-sharing	5.8%	5.2%	24.2%	64.8%
	Poland	Car-sharing	7.9%	13.2%	68.6%	10.3%
		Home-sharing	2.8%	7.9%	52.9%	36.5%
		Food-sharing	3.0%	3.7%	27.2%	66.1%
		Goods-sharing	3.4%	3.2%	26.0%	67.5%
		Finance-sharing	3.2%	3.2%	32.5%	61.1%

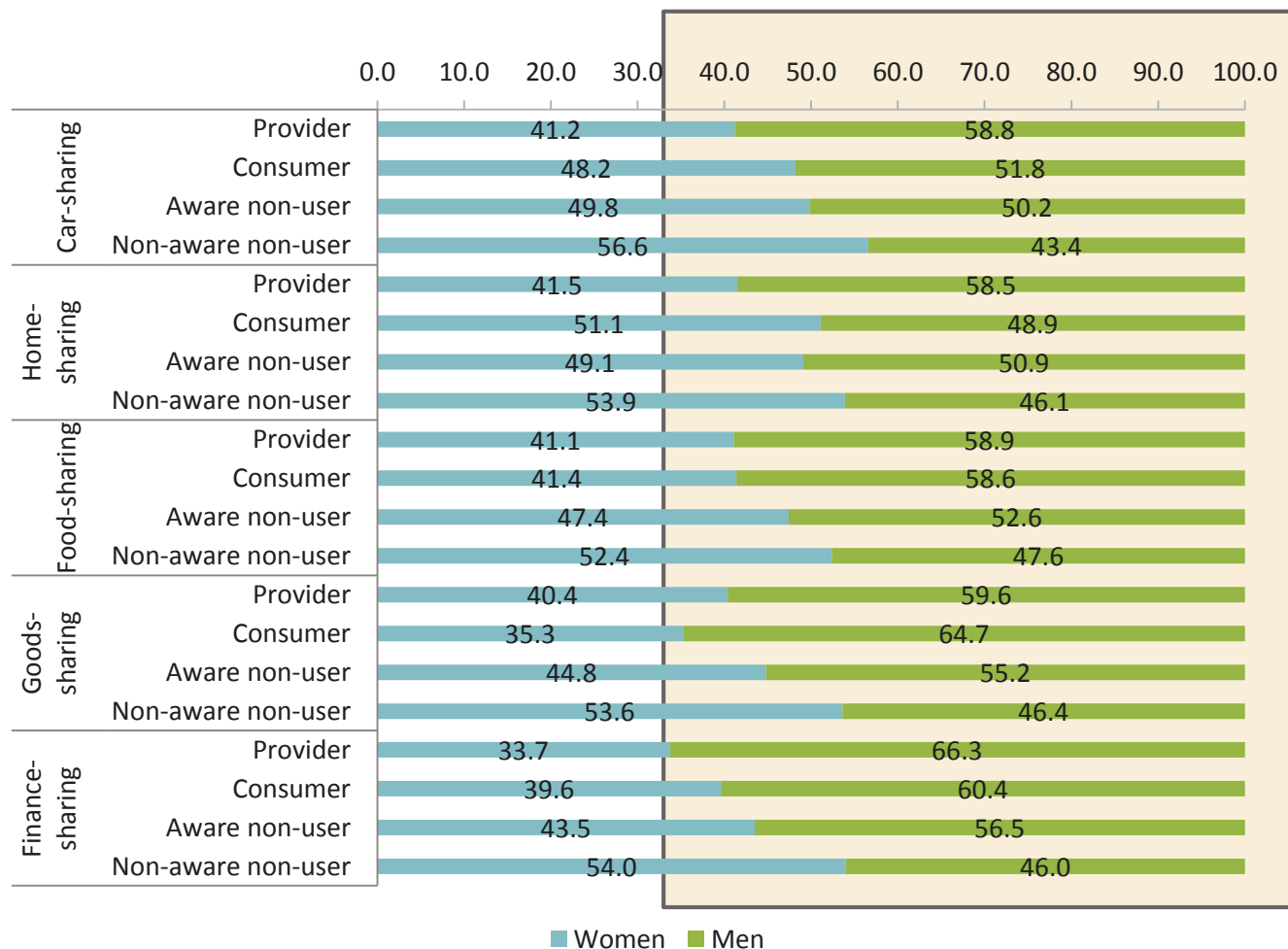
(continued)

		<i>In percent</i>	Provider	Consumer	Aware Non-User	Non-Aware
	Portugal	Car-sharing	2.4%	13.4%	81.0%	3.2%
		Home-sharing	3.2%	10.8%	70.9%	15.2%
		Food-sharing	1.6%	2.4%	37.3%	58.7%
		Goods-sharing	1.4%	1.6%	35.9%	61.1%
		Finance-sharing	1.6%	1.2%	29.7%	67.5%
	Spain	Car-sharing	8.4%	12.9%	72.7%	6.0%
		Home-sharing	3.0%	16.3%	67.4%	13.3%
		Food-sharing	2.2%	6.0%	33.7%	58.1%
		Goods-sharing	2.1%	4.3%	29.4%	64.2%
		Finance-sharing	2.1%	3.7%	30.1%	64.0%
	Switzerland	Car-sharing	3.6%	14.2%	65.2%	17.0%
		Home-sharing	3.0%	18.2%	62.6%	16.2%
		Food-sharing	2.6%	5.1%	32.0%	60.3%
		Goods-sharing	2.2%	4.0%	31.4%	62.5%
		Finance-sharing	2.2%	3.8%	26.1%	68.0%
	UK	Car-sharing	1.6%	22.0%	66.8%	9.6%
		Home-sharing	2.4%	17.8%	67.6%	12.2%
		Food-sharing	1.6%	5.6%	28.8%	64.0%
		Goods-sharing	2.4%	4.0%	25.6%	68.0%
		Finance-sharing	1.6%	3.4%	34.6%	60.4%

Providing goods- and finance-sharing is a particularly „young“ phenomenon

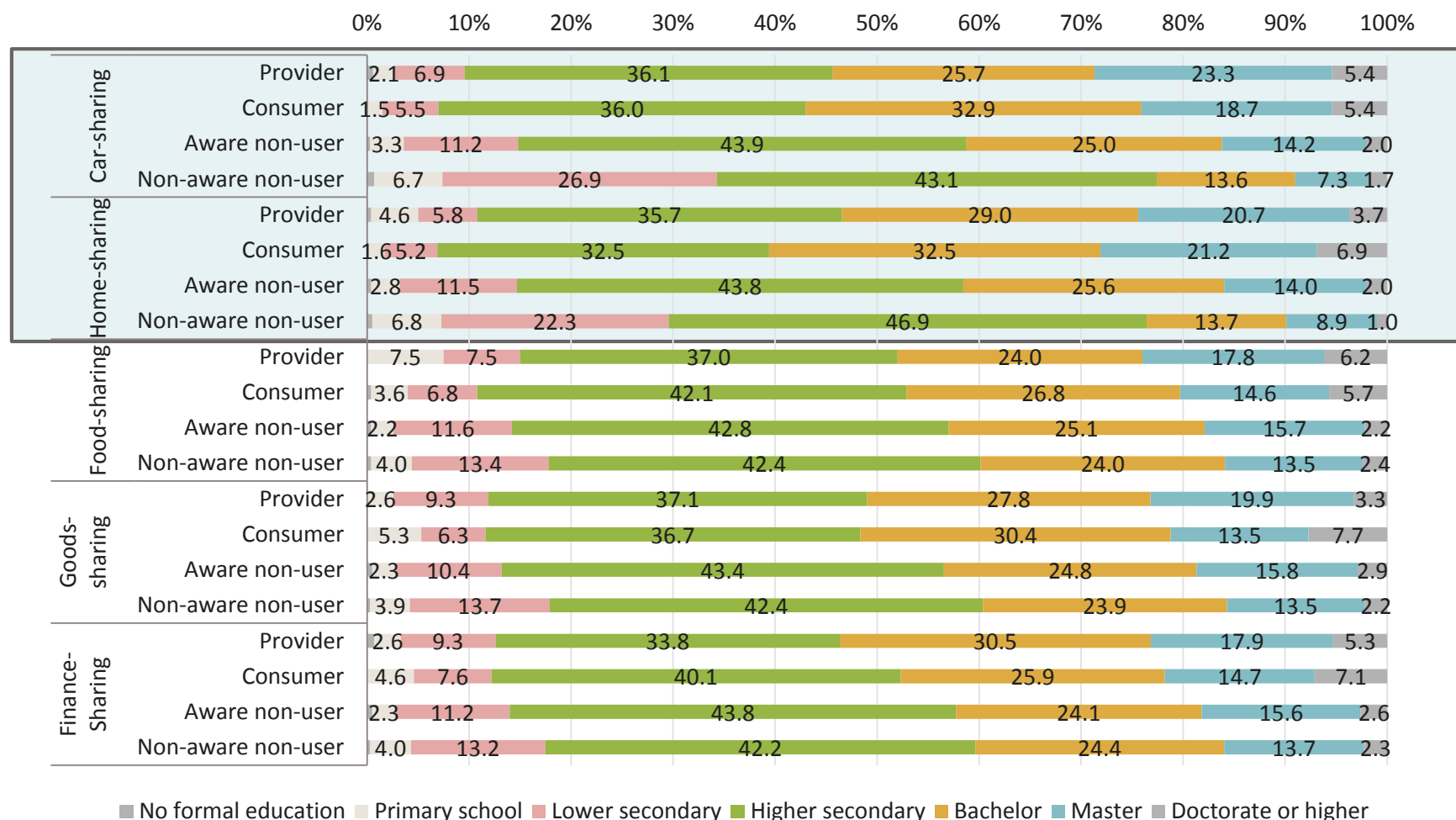


Across services, men more readily provide than women



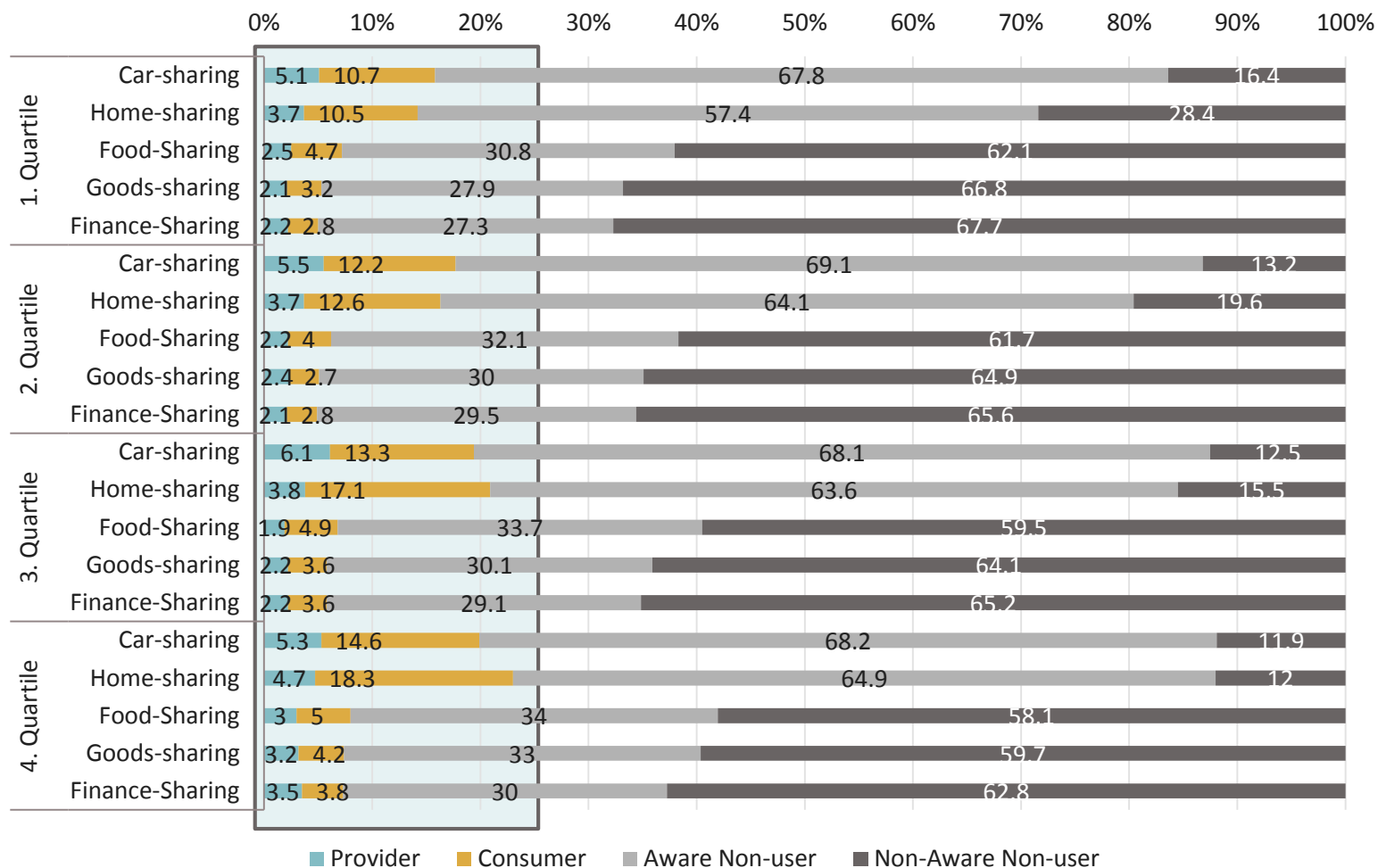
N = 6111; Ratio of women and men in different services is displayed

In car- and home-sharing (un)awareness is strongly related to education



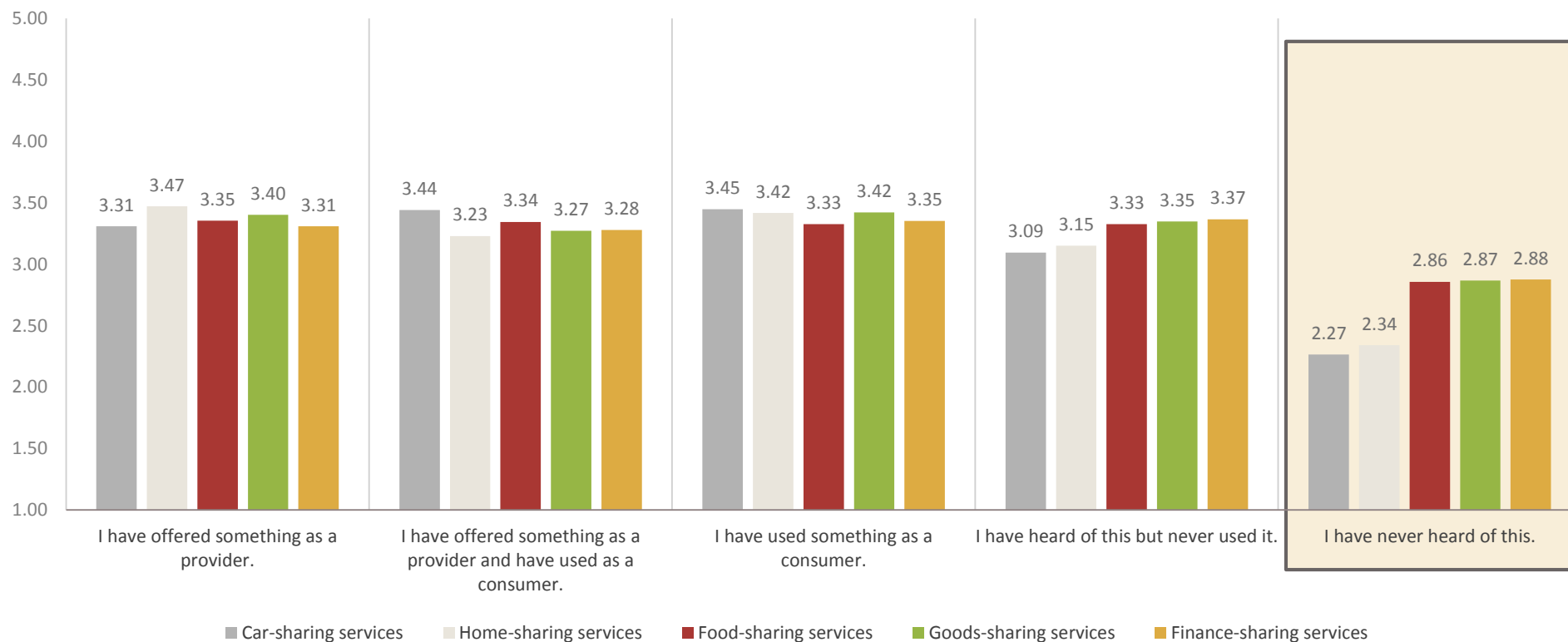
N = 6111; Distribution of user types and their educational level in different services is displayed

Consuming sharing services is positively related to income



N = 6043; Distribution of user types by services in different income quartiles is displayed

Non-aware non-users have very low Internet skills



*N = 6111; Arithmetic means are displayed
Internet skills: 1-5 scale with 1-very low, 2-low, 3-average, 4-high, 5-very high*

Key Insights into Sharing Participation

- **A majority of respondents is not engaged in the sharing economy.** Only 18.7% report having consumed sharing services, 9.1% say they have offered a service as a provider. The largest share (62.5%) have heard of sharing services, but have not used any themselves.
- Among the twelve surveyed countries, **France and UK show the highest share of sharing participants** – however while UK has a large share of consumers, France features the highest proportion of sharing providers.
- Sharing participation is **most common among young, well-educated, higher income Europeans**. Lower-education respondents do provide some sharing services, but levels of consumption rise rapidly with rising educational attainment.

Key Insights into Sharing Participation (contd.)

- The European sharing economy **is largely comprised of car- and home-sharing** – other services show much lower overall levels of participation. Those not aware of car- and home-sharing feature particularly low levels of education and Internet skills.
- While consuming home-sharing services is more common among higher-income individuals, the same doesn't hold for car-sharing, which is quite equally common across income quartiles.
- **Young male Europeans are more ready to experiment with smaller, unfamiliar services.**

3 **Sharing Motives** among Participants and Non-Participants

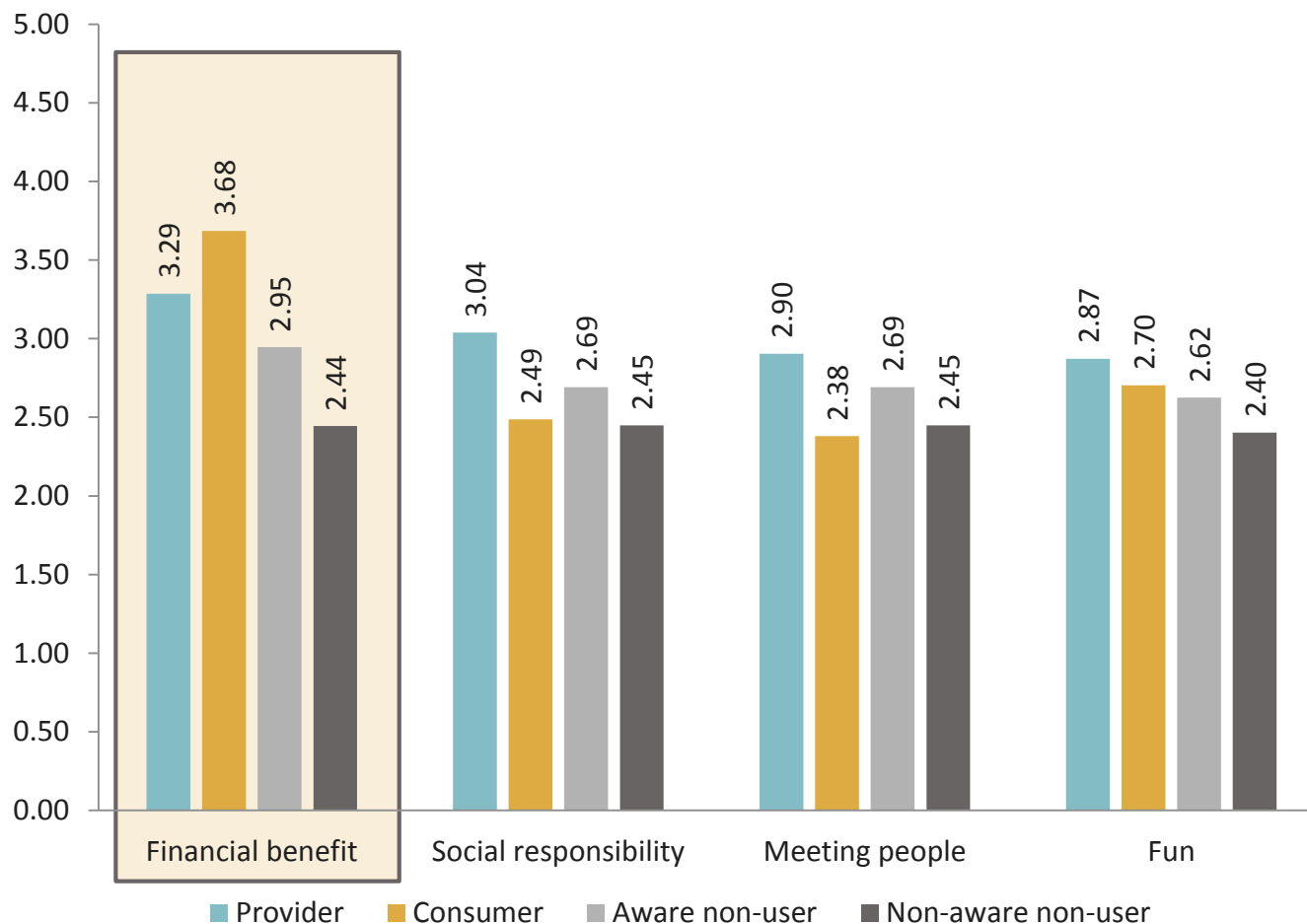
The importance of financial, social, societal
benefits and fun for (non-)participants



It's all about (Saving) Money – and Fun

Financial benefits dominate consumers' motives to participate in sharing, followed by fun. Providers show a more varied set of participation motives.

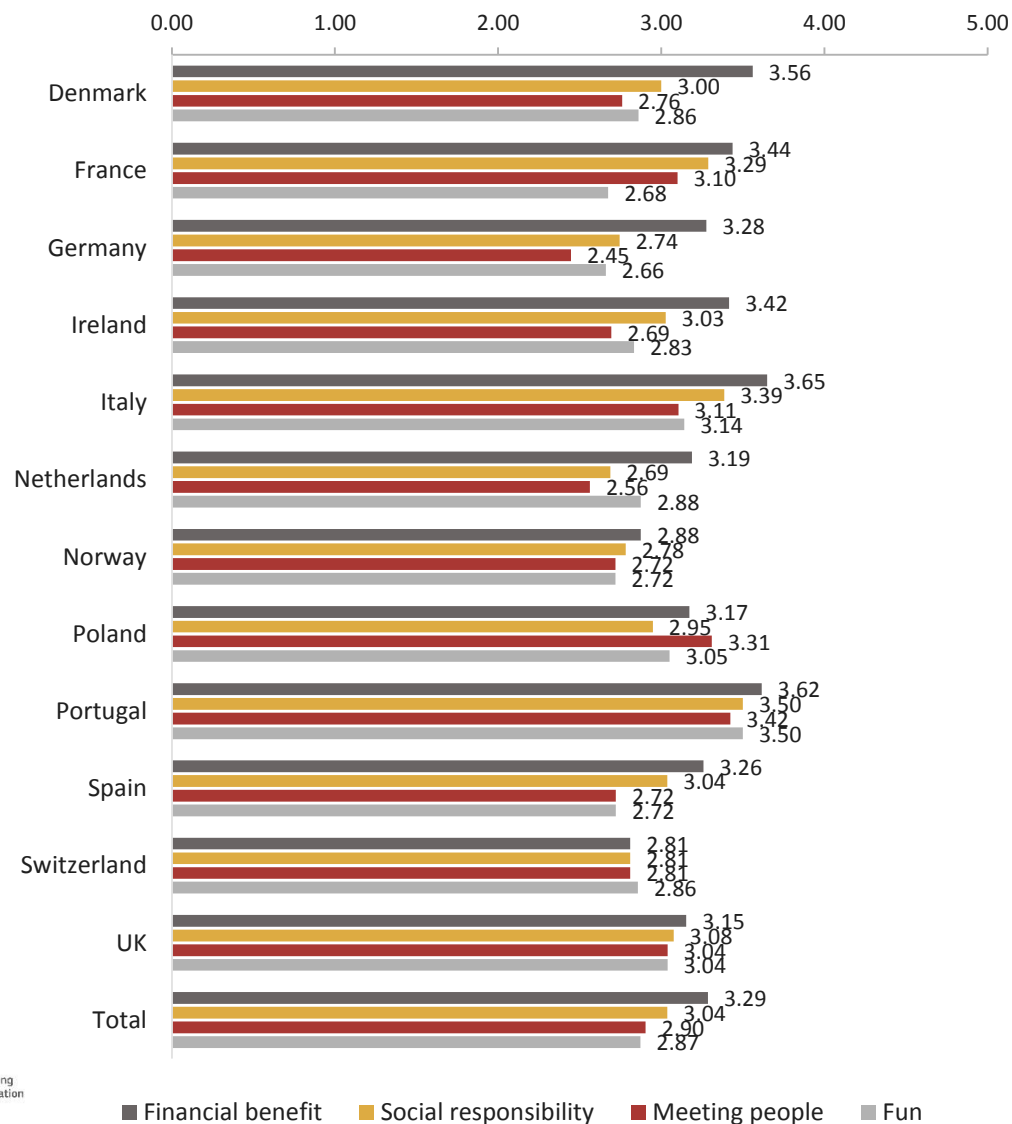
While financial benefits are most important for all types of respondents, consumers are especially keen



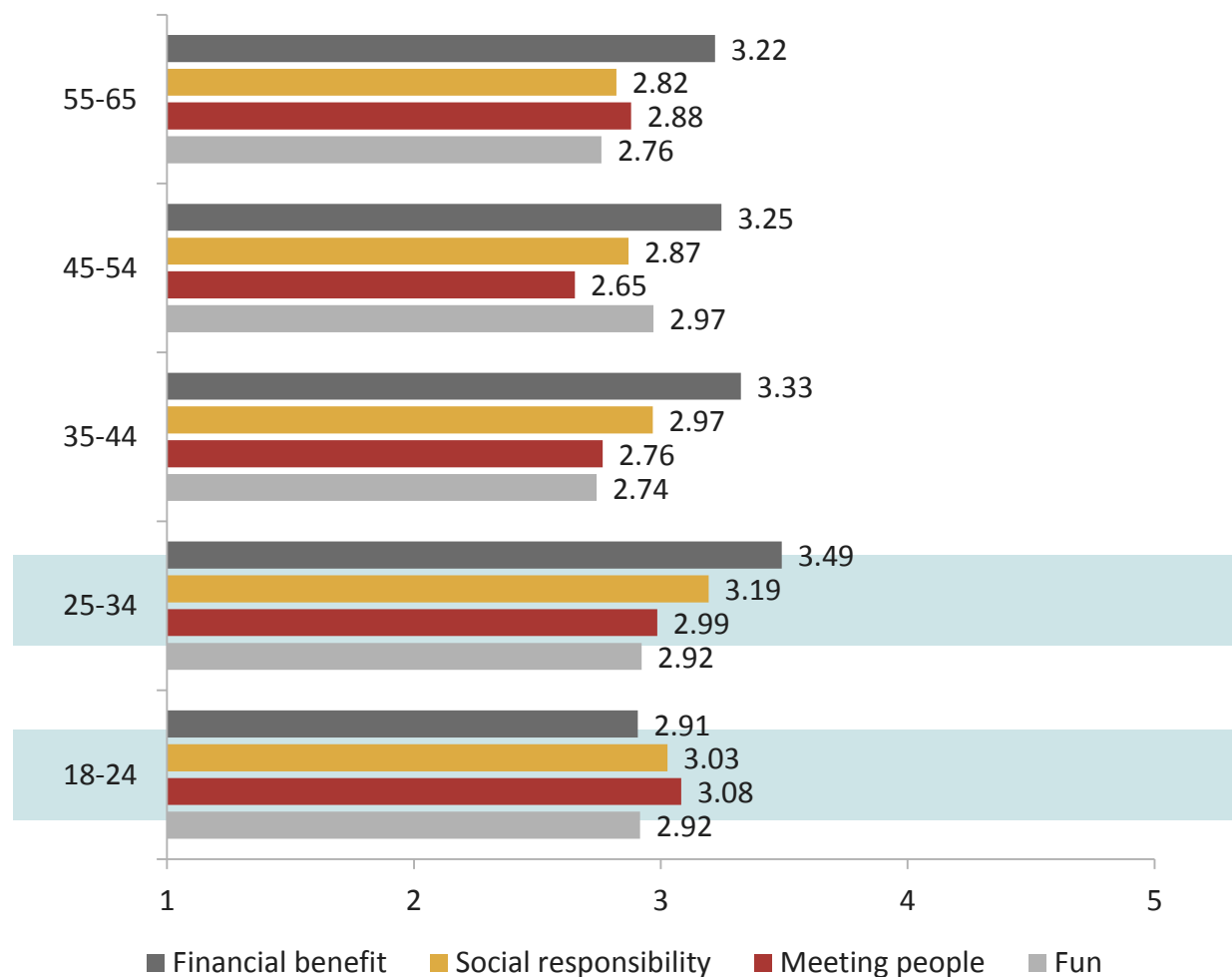
N = 6111; Arithmetic means by user type are displayed

Importance of motives: 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much

Income particularly important for providers in German, Denmark and Ireland



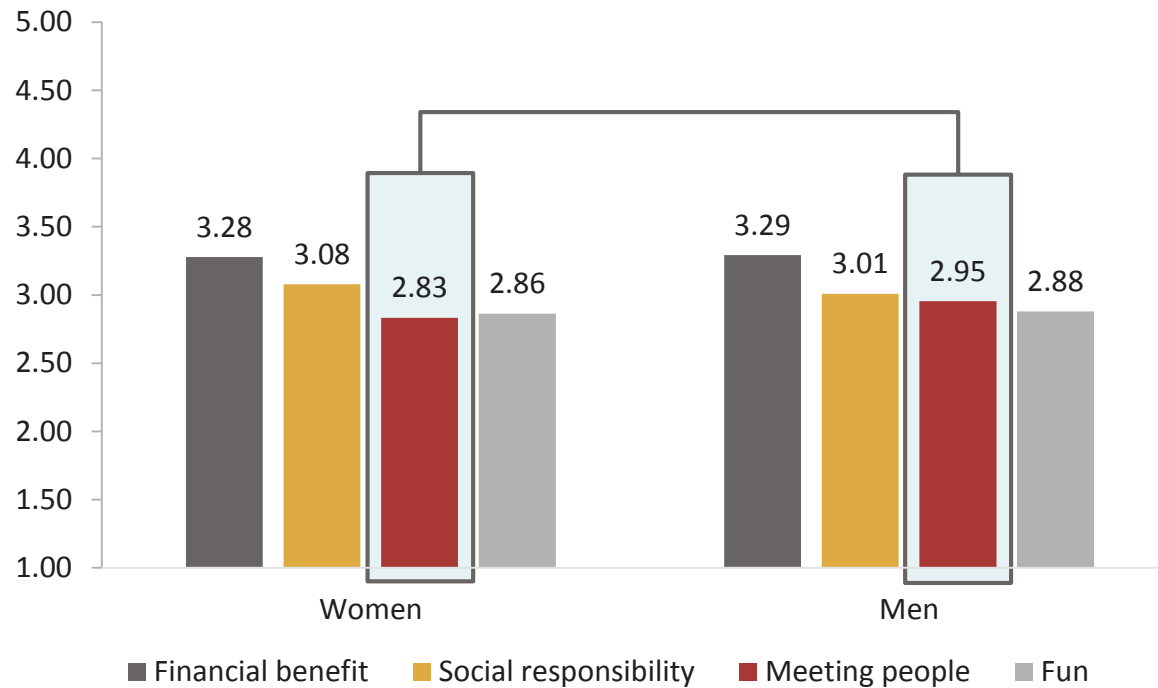
Younger providers more geared towards social motives



N = 556; Arithmetic means for providers by age groups are displayed

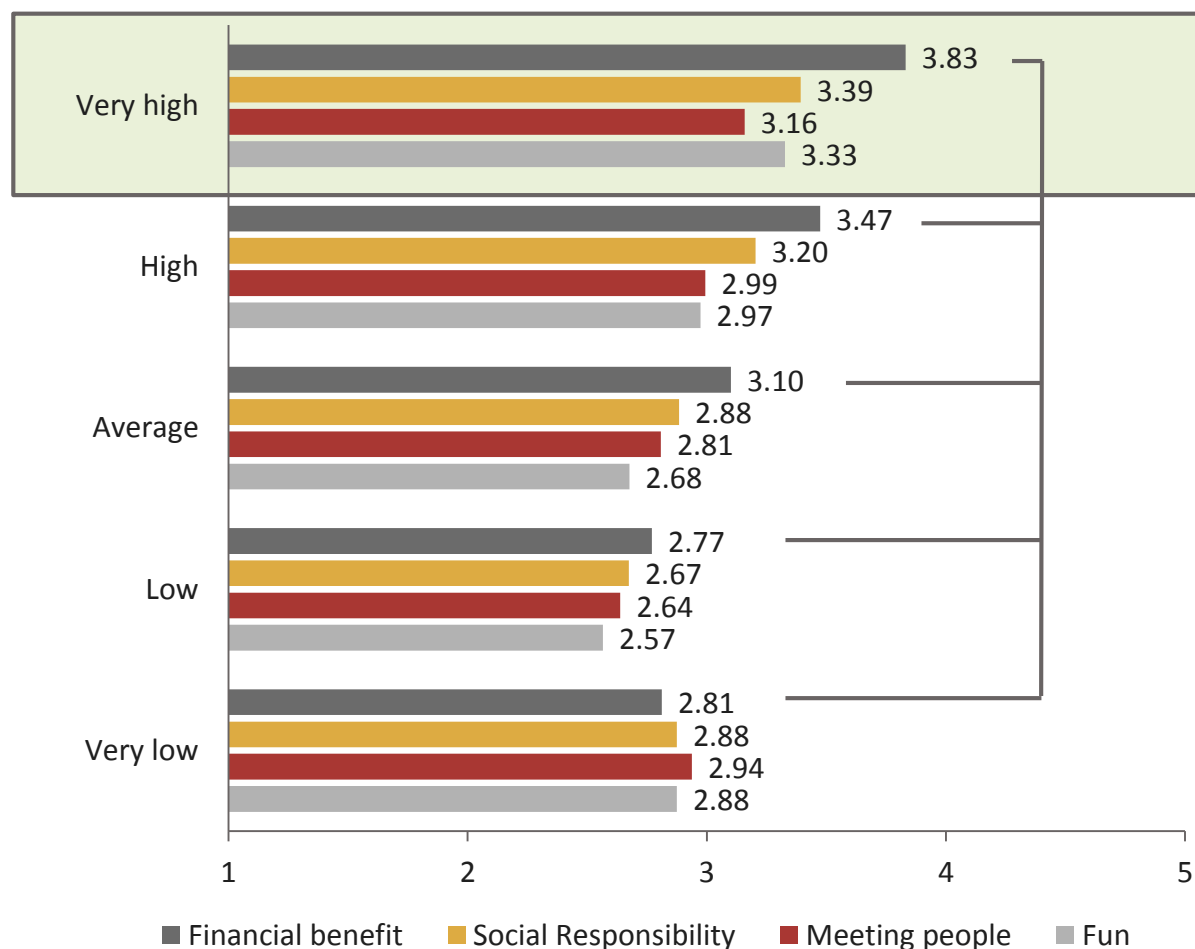
Importance of motives: 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much

Male providers more interested in meeting people

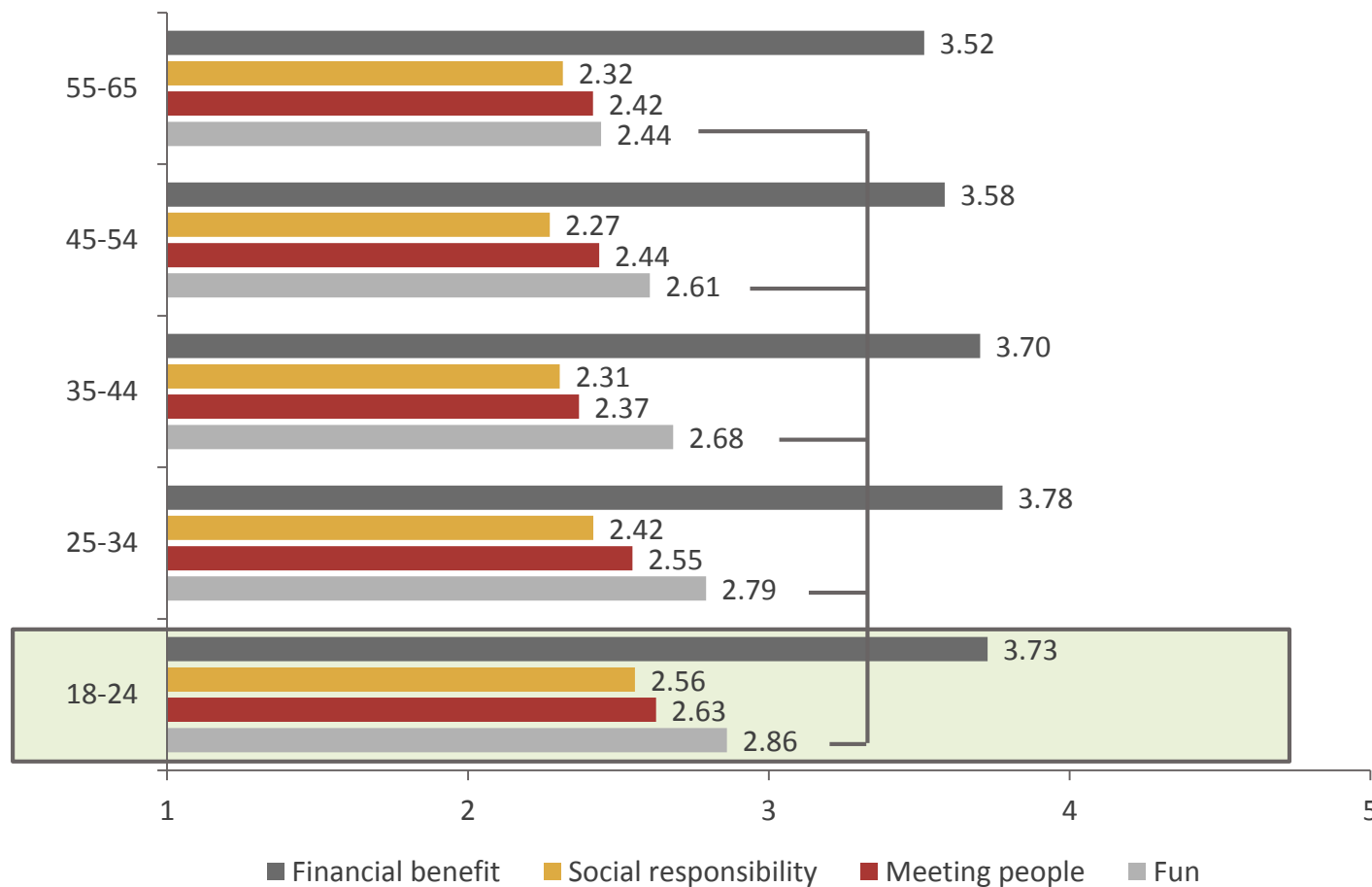


N = 556; Arithmetic means for providers by gender are displayed
Importance of motives: 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much

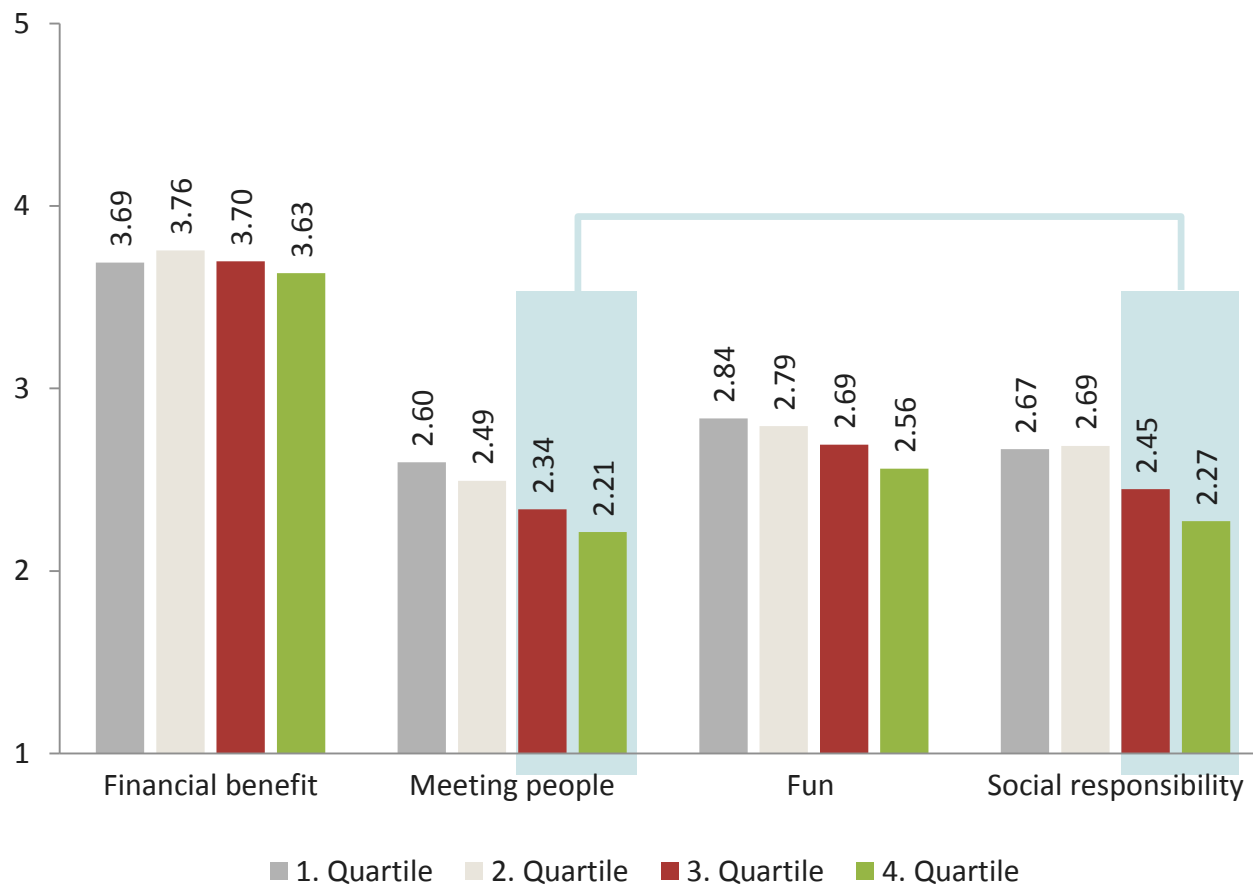
Skilled providers particularly geared towards financial benefits



Younger consumers consider sharing more fun

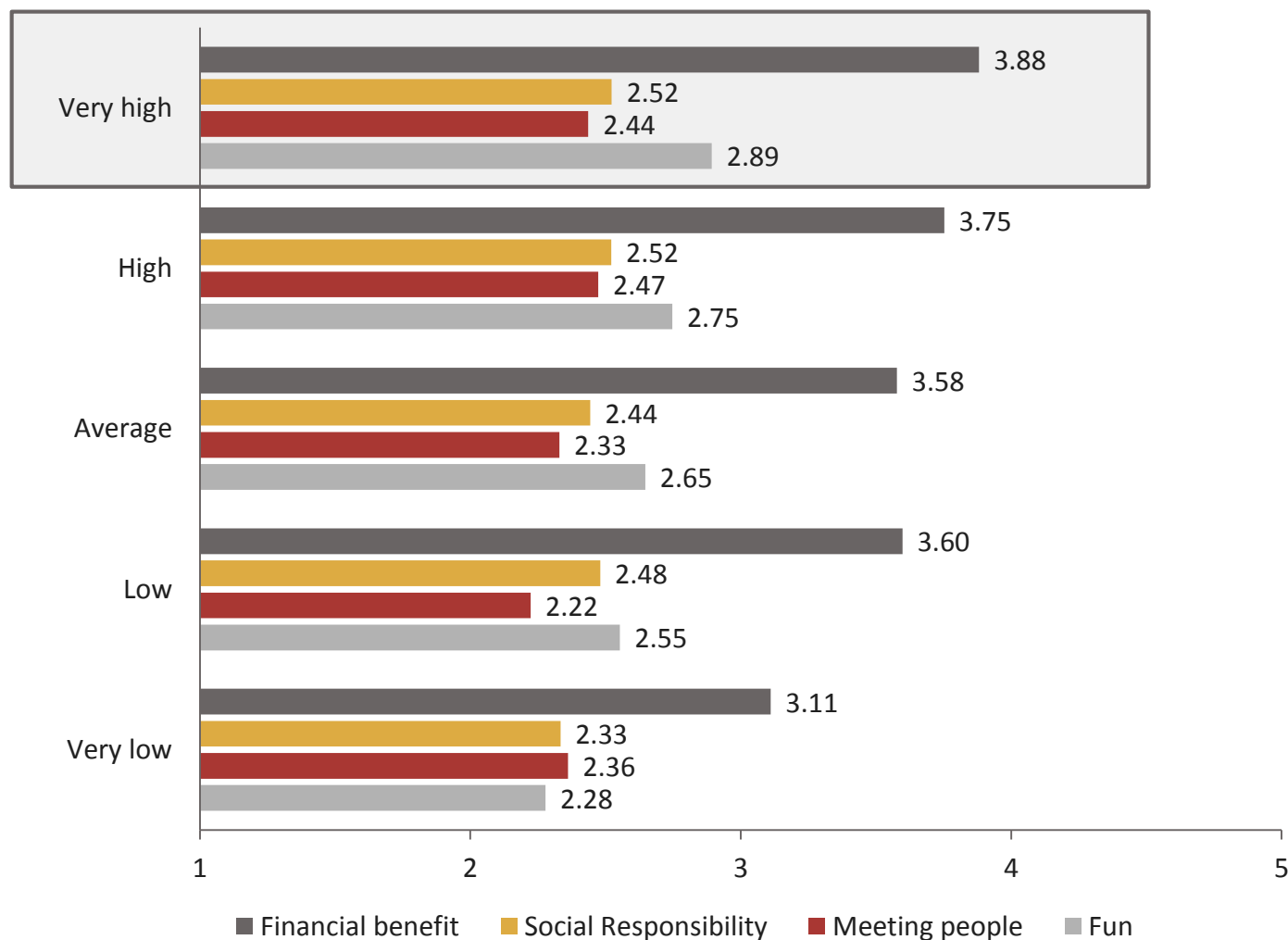


Social motives less important for high-income consumers

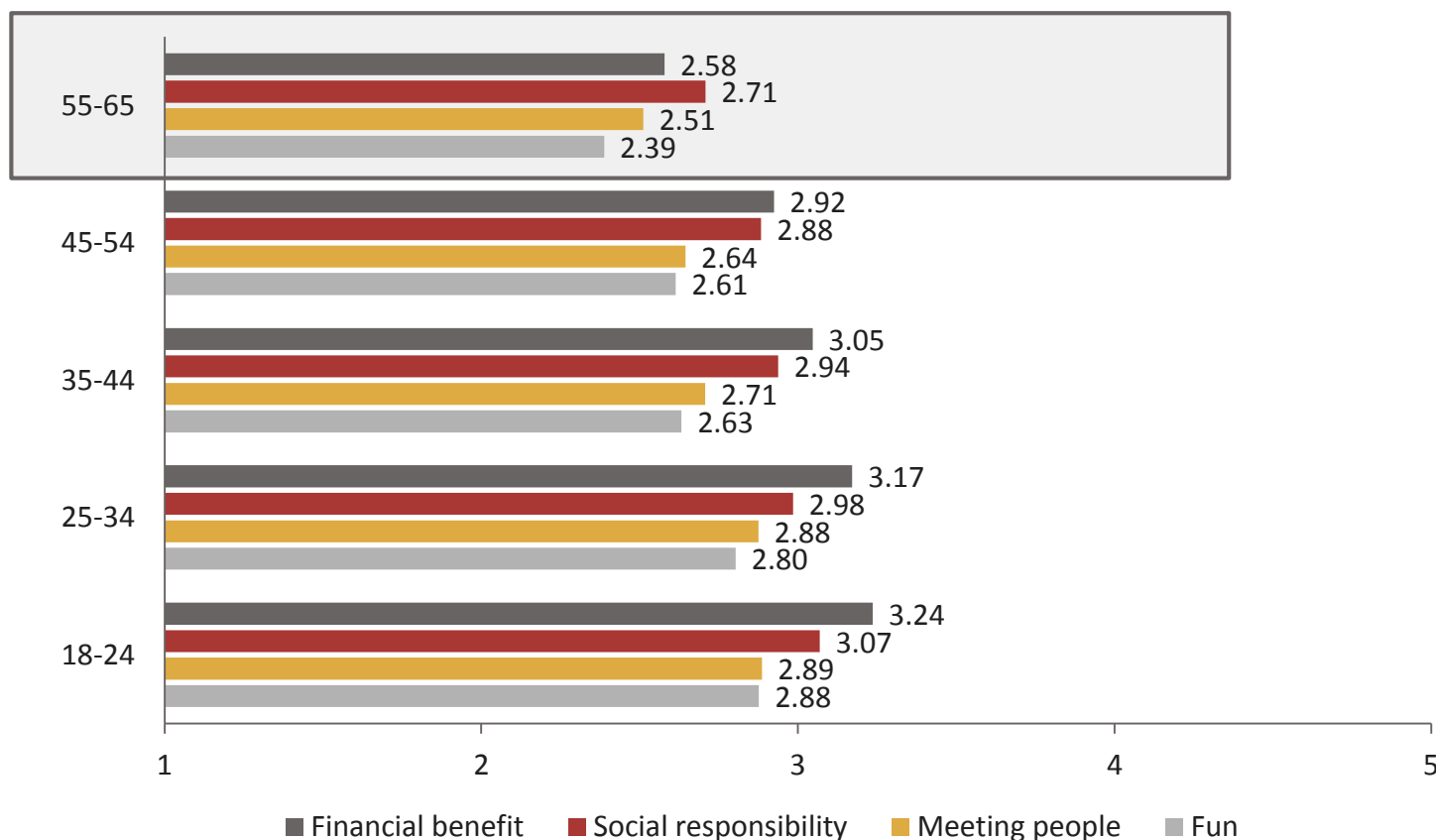


N = 1143; Arithmetic means for consumers by income quartiles are displayed
Importance of motives 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much
Quartiles cut the distribution of income in approximately even quarters

High-skilled consumers experience sharing as more fun – and financially attractive



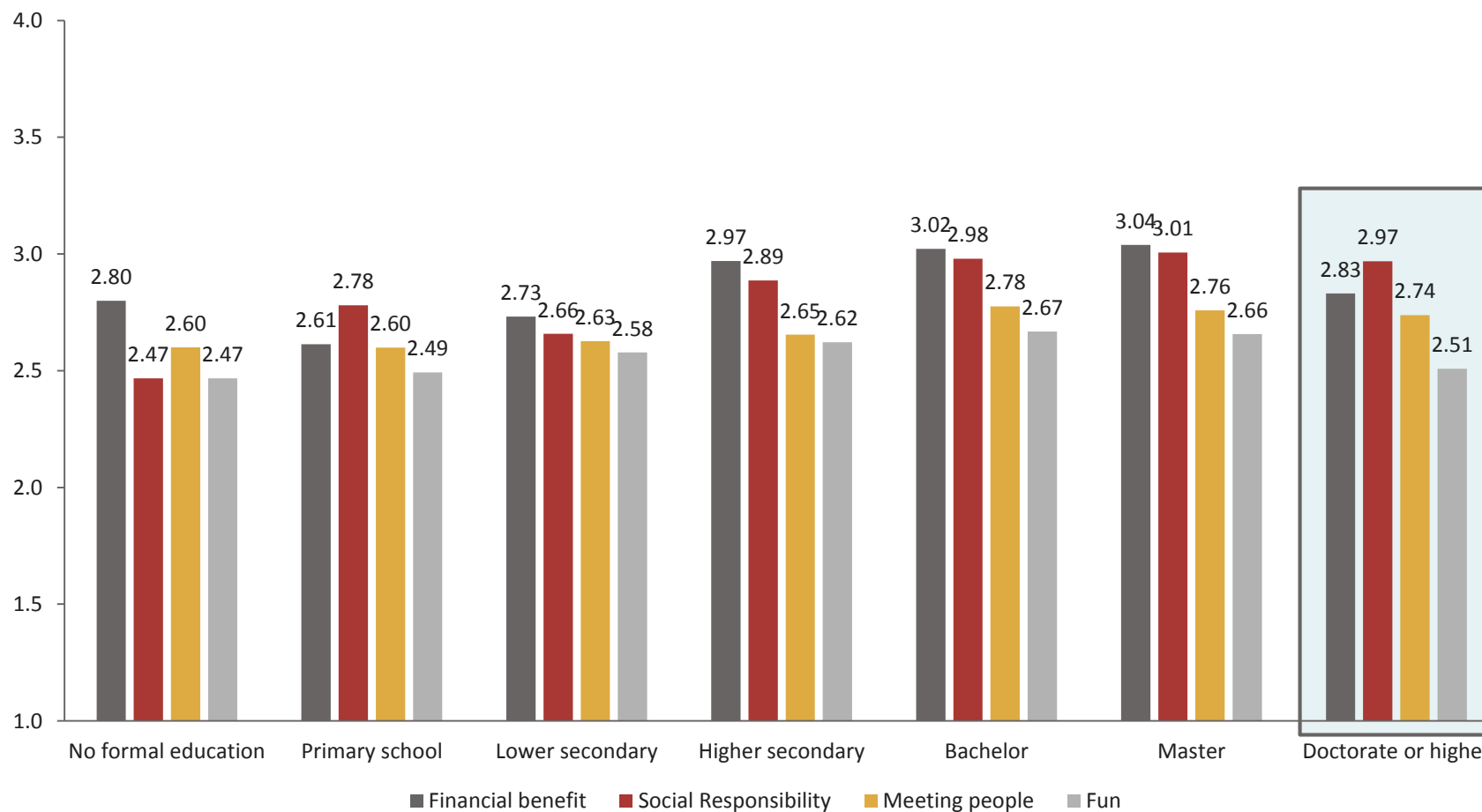
Particularly older aware non-users assume primarily societal benefits



N = 3818; Arithmetic means for aware non-users by age group are displayed

Importance of expected benefits: 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much

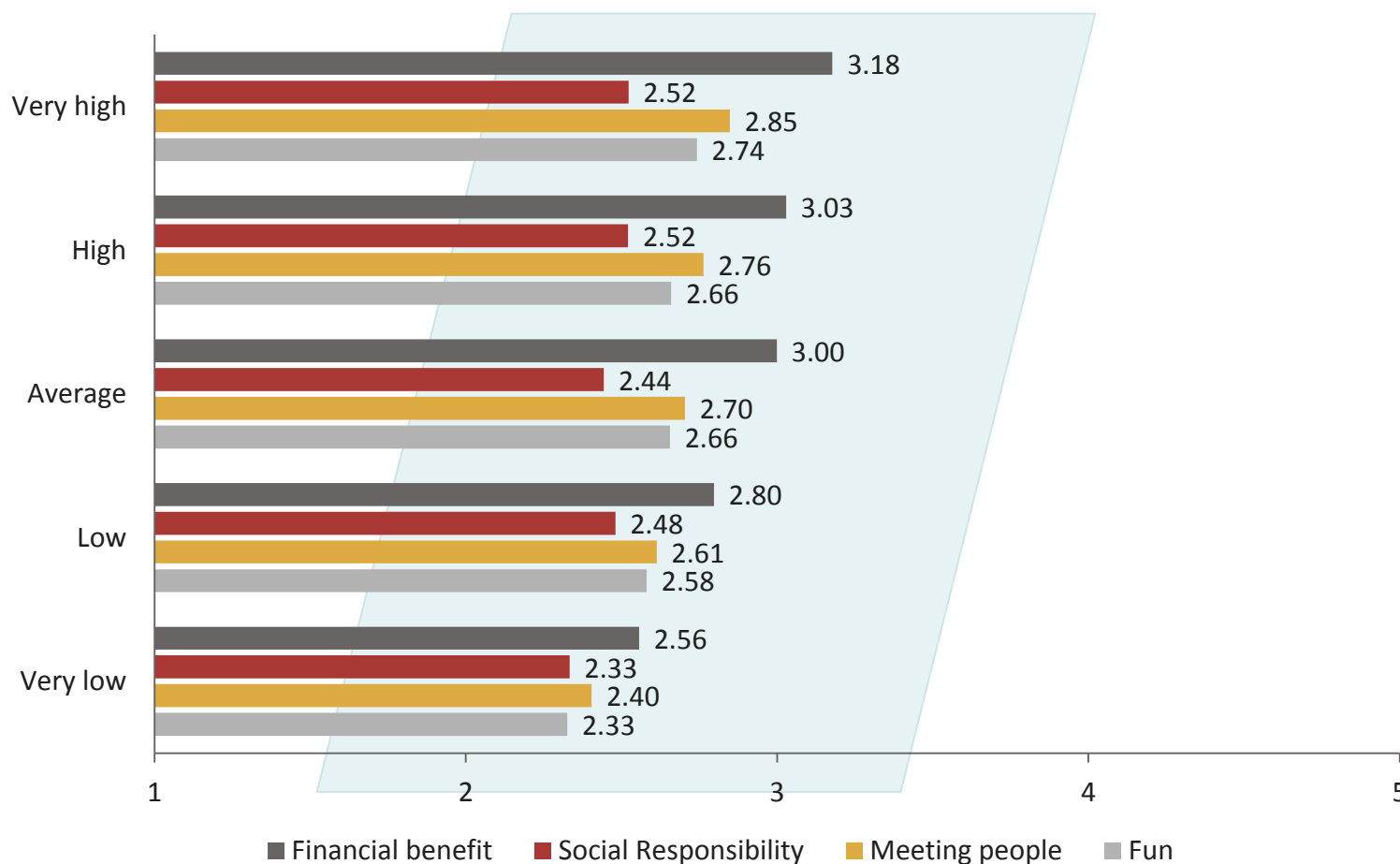
Lower-educated aware non-users see less of a societal benefit



N = 3818; Arithmetic means for aware non-users by education are displayed

Importance of expected benefits: 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much

High-skilled aware non-users generally expect more benefits from sharing



N = 3818; Arithmetic means for aware non-users by Internet skills are displayed

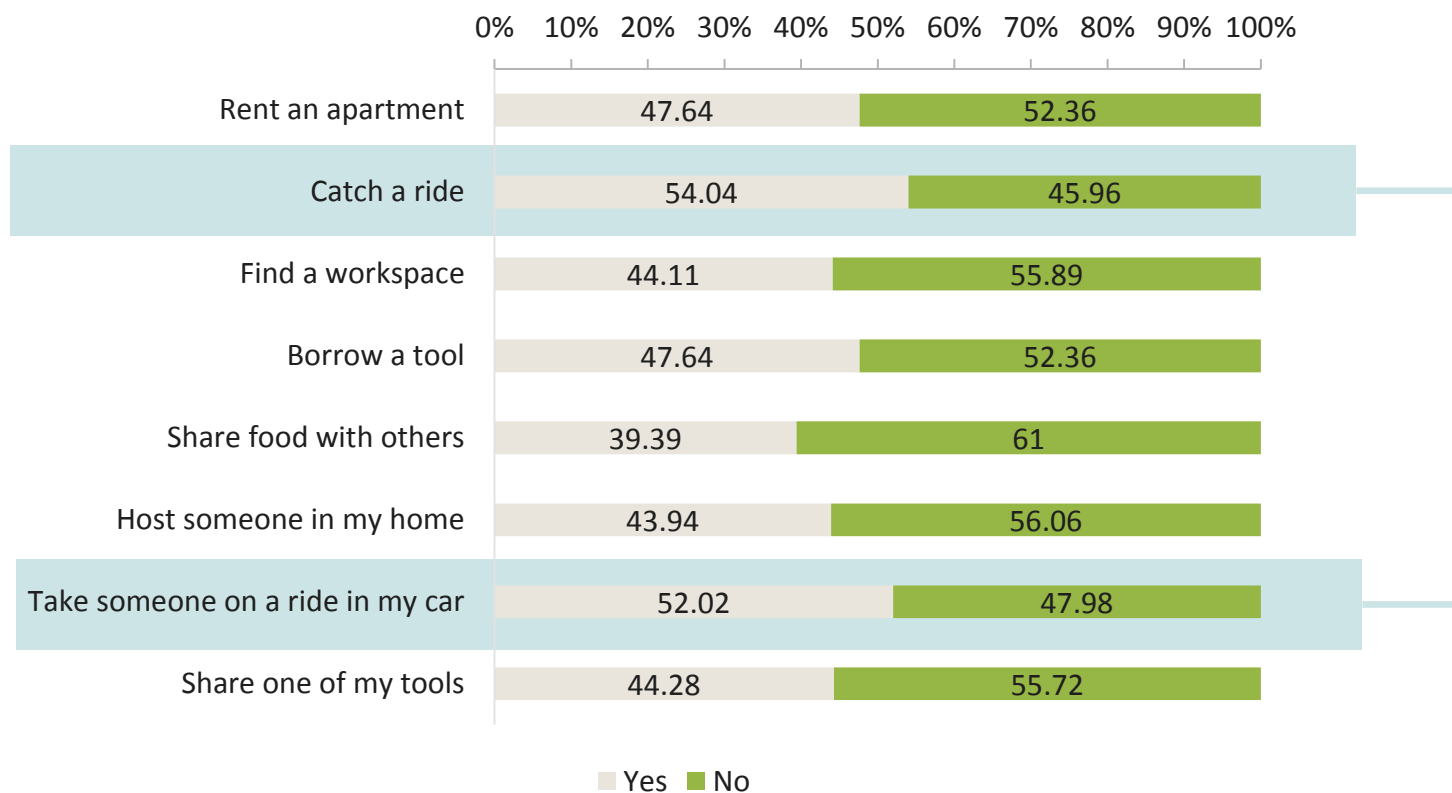
Importance of expected benefits: 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much



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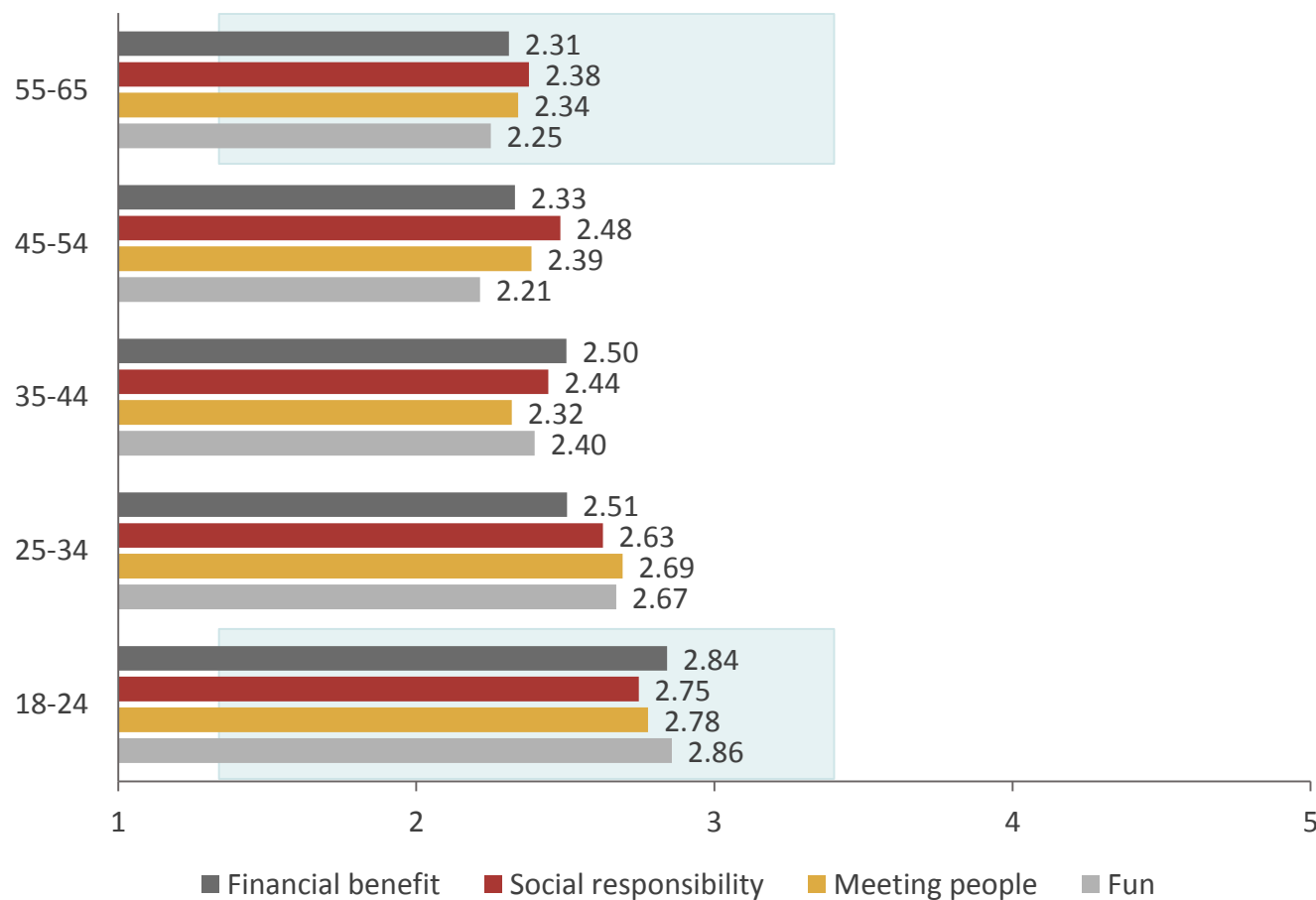
Non-users mostly associate the sharing economy with ride-sharing



N = 594, Non-aware non-users

Sample question: 'What do you think sharing platforms can be used for?'

Older non-aware non-users also assume more social benefits



N = 594; Arithmetic means for non-aware non-users by age group are displayed

Importance of expected benefits: 1-5 scale with 1-not at all, 2-to a small extent, 3-to a moderate extent, 4-to a large extent, 5-very much

Key Insights into Sharing Motives

- **Financial benefits are the most important motivational driver** of participation in the sharing economy – both in terms of providing and consuming. However, financial benefits play a much more dominant role for consumers, compared to providers.
- **Providers estimate social responsibility and social interaction motives significantly higher than consumers.** Younger providers, especially, consider financial benefits less relevant than older cohorts. For them, providing is more about meeting people and exercising social responsibility.
- **Higher income consumers are especially driven by financial benefits,** ranking other motives consistently lower than lower-income consumers do.
- **Aware non-users consider financial benefits less of a boon of sharing services than actual consumers do, but rate social responsibility and social interaction more highly.** This could be due to biases in platforms' marketing efforts and public discourse. This is especially true for older non-users (as younger ones may have heard more first-hand user accounts).

4 Internet Access as Precondition for Sharing Participation

The relationship between Internet use frequency, access device use and (non-) participation



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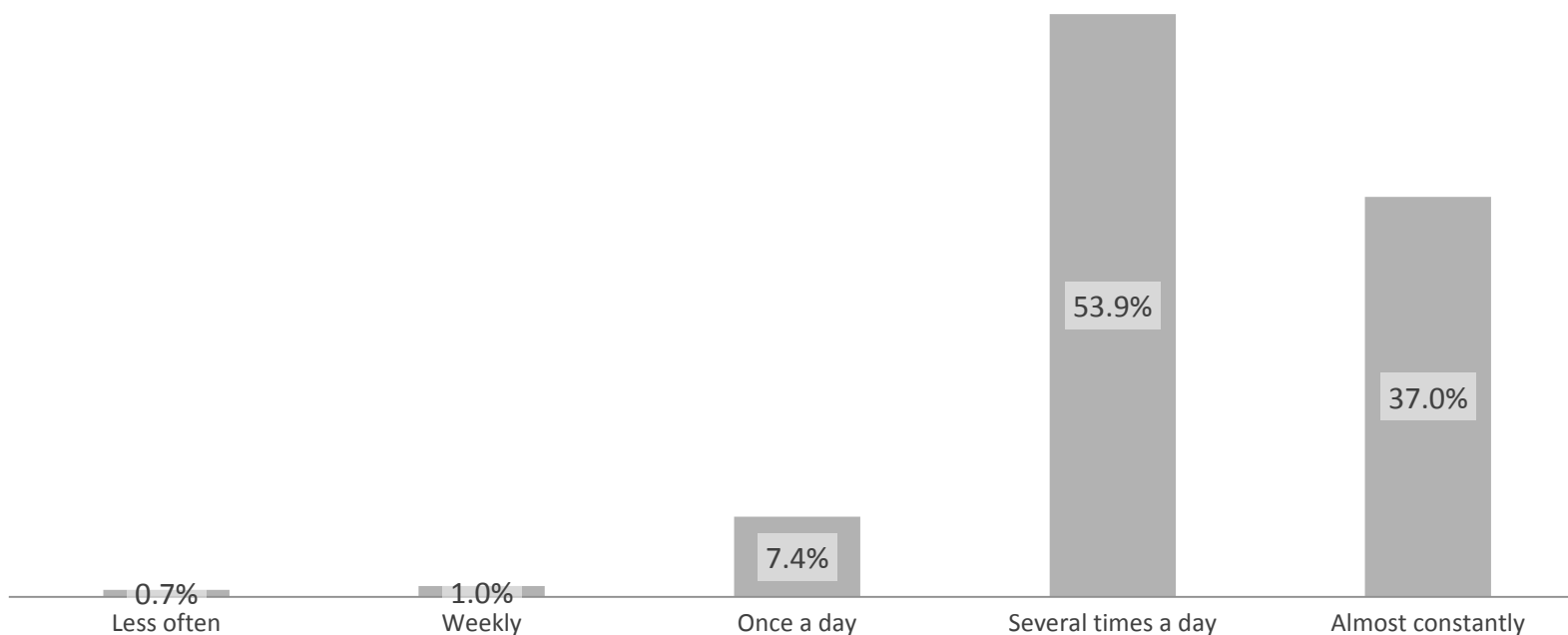
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There is a Digital Divide in the Sharing Economy

Non-participants in the sharing economy use the Internet less frequently than participants, particularly through mobile devices. Internet skills play a key role in distinguishing participants from non-participants.

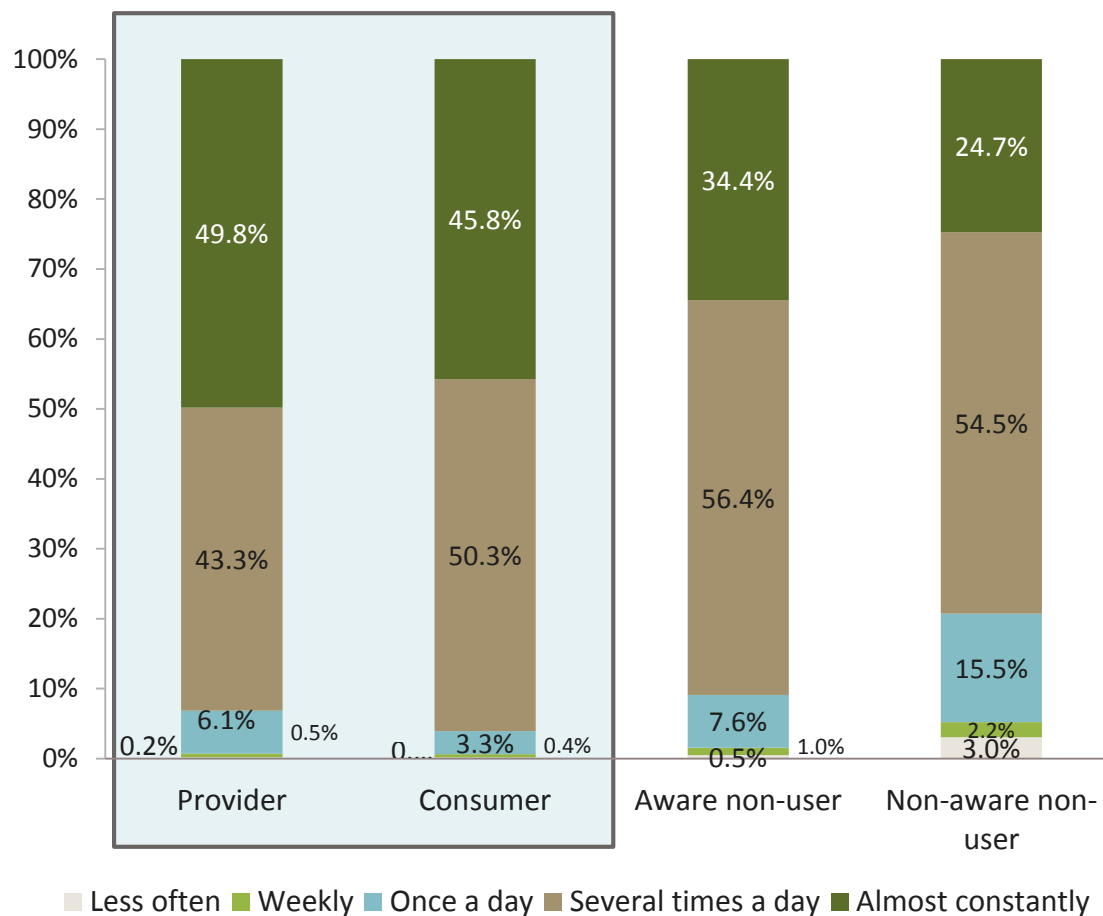
Daily Internet use is the norm throughout Europe...



N = 6111; Percentages

Internet use frequency: 1-5 scale with 1-less often, 2-weekly, 3-once a day, 4-several times a day, 5-almost constantly

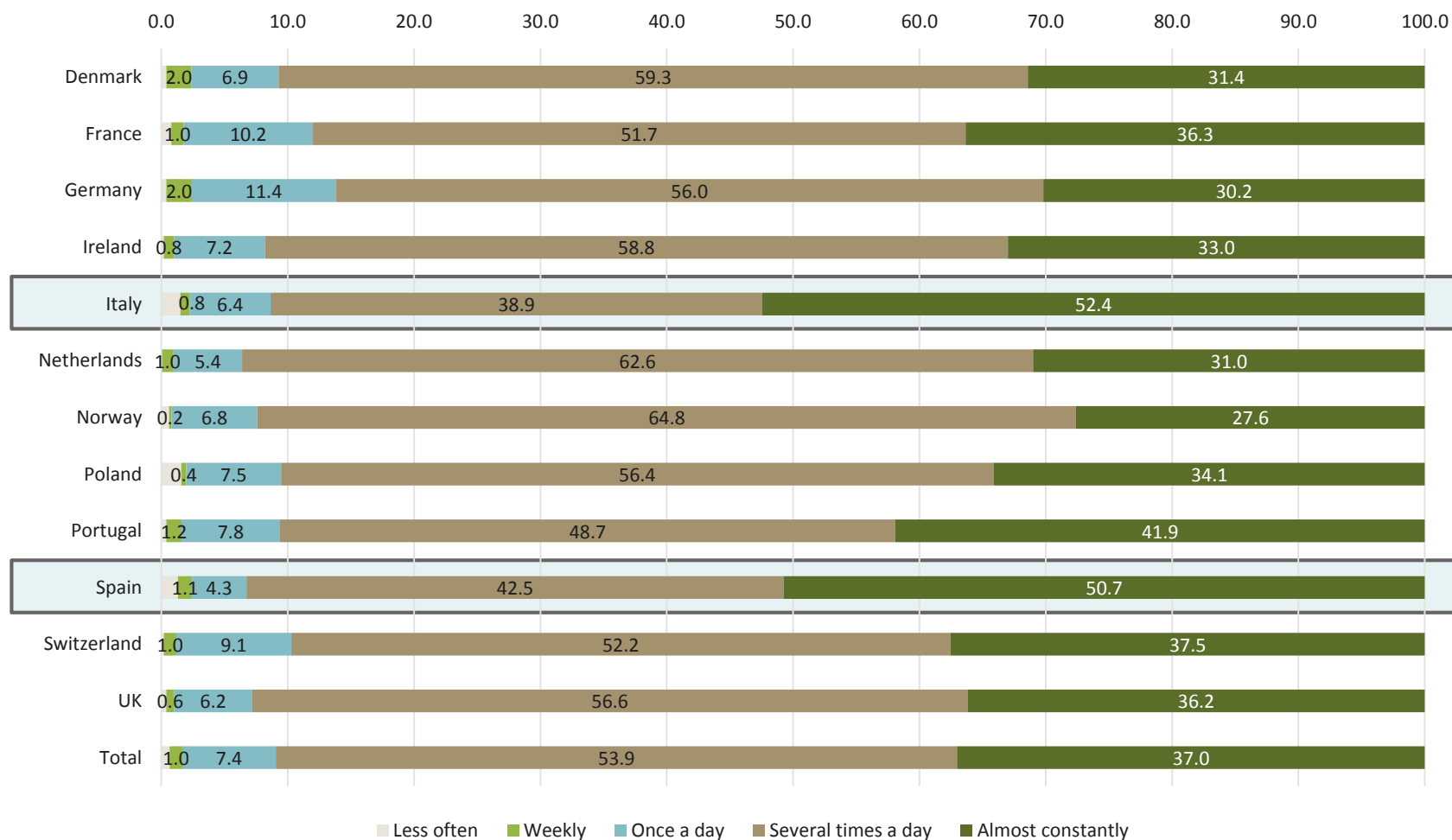
... but sharing participants are more avid Internet users than non-participants



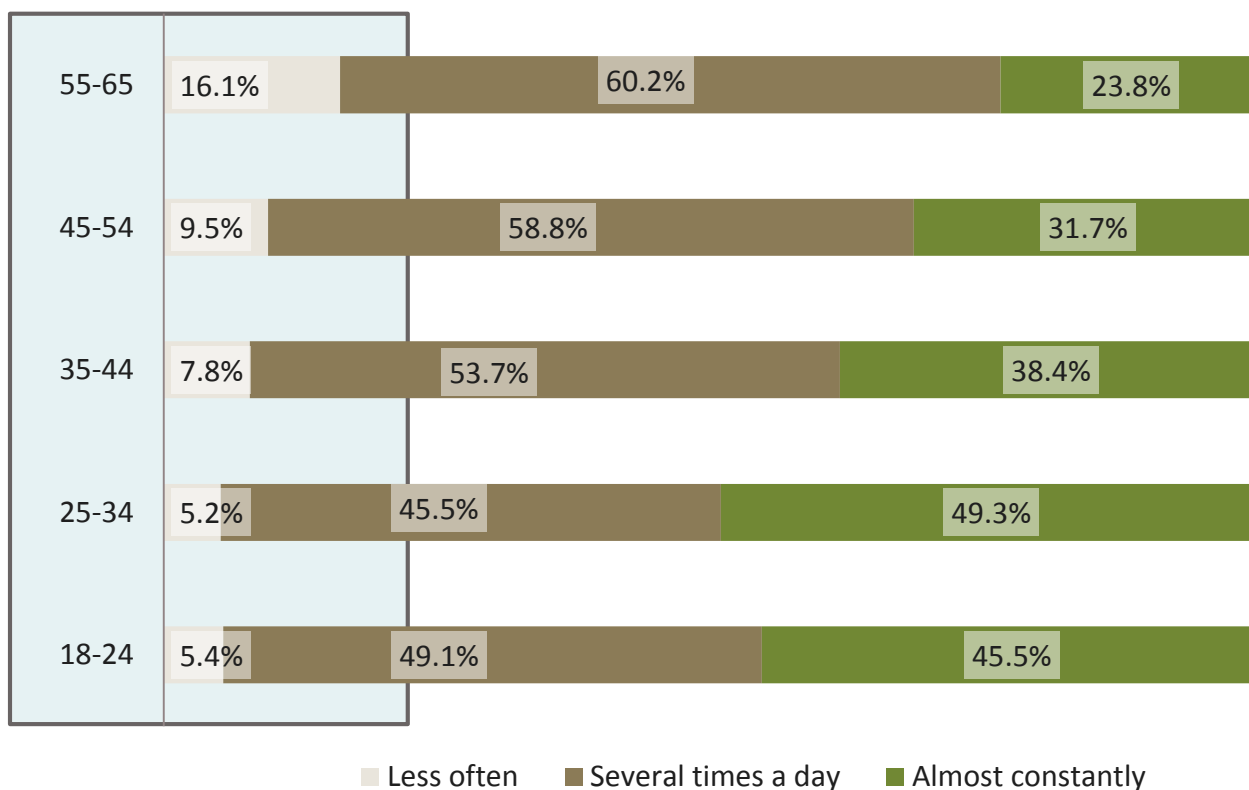
N = 6111

(Providers: 556; Consumers: 1143; Aware non-users: 3818; Non-aware non-users: 594)

“Always on” particularly common in Italy and Spain



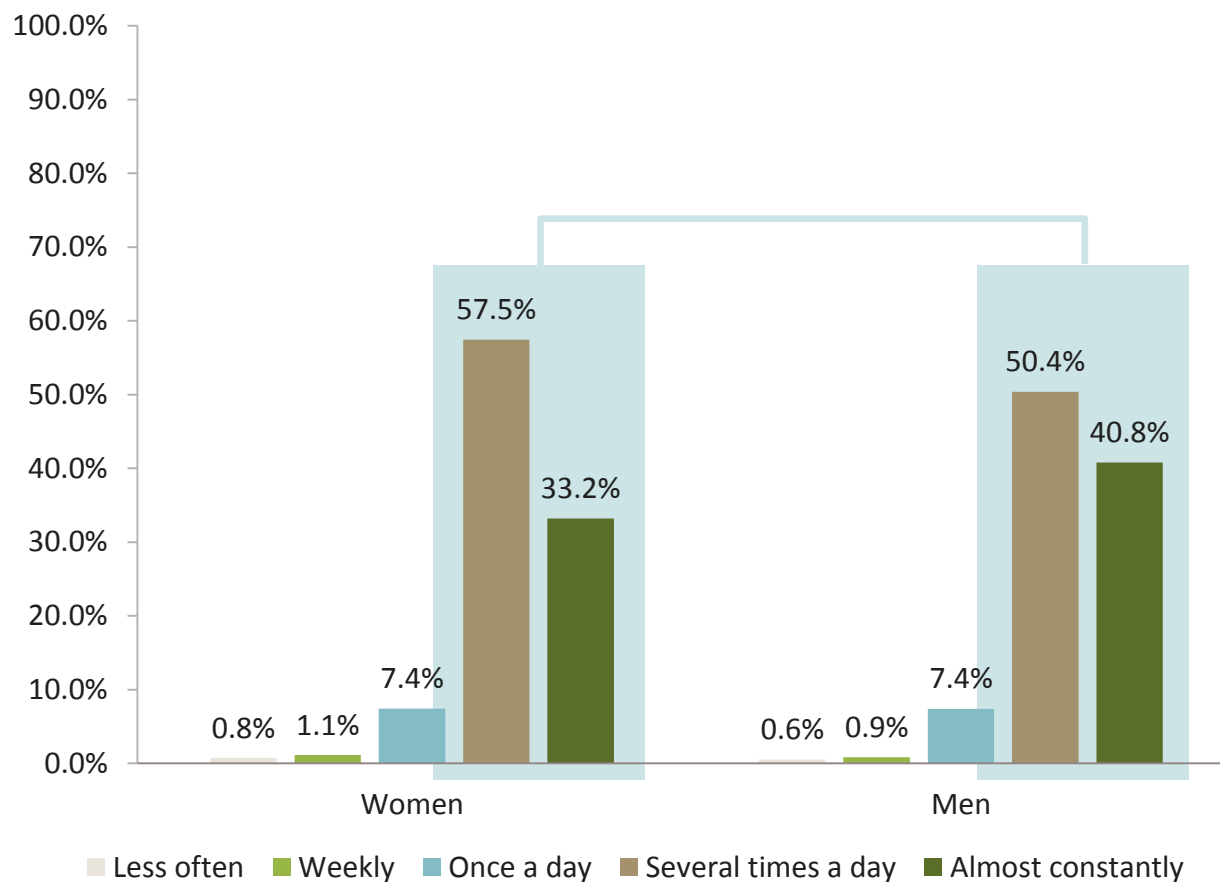
An age divide persists among Europeans



N = 6111; reduced scale

Original Internet use frequency: 1-5 scale with 1-less often, 2-weekly, 3-once a day, 4-several times a day, 5-almost constantly

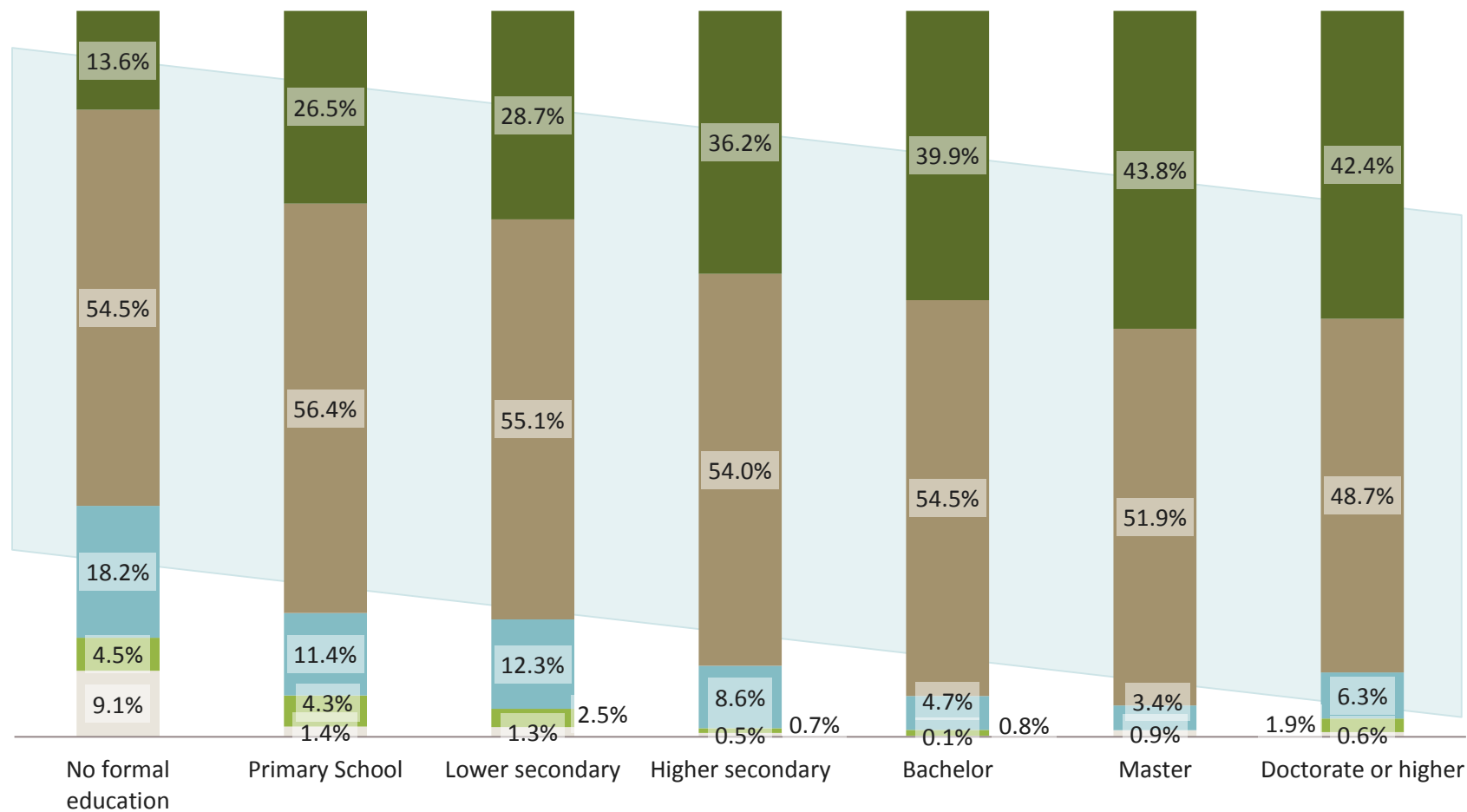
Slight gender divide in terms of access frequency



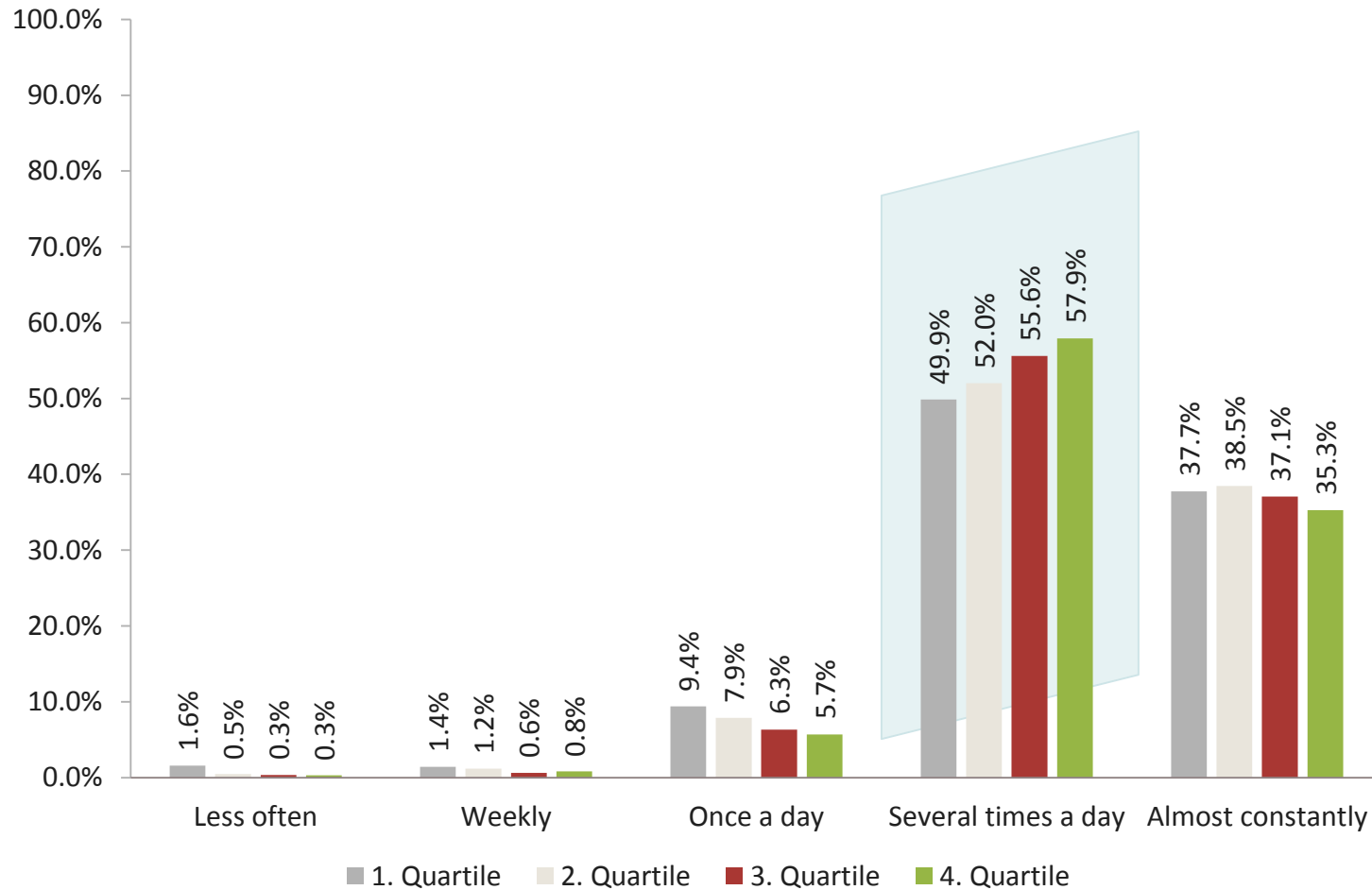
N = 6111

Internet use frequency: 1-5 scale with 1-less often, 2-weekly, 3-once a day, 4-several times a day, 5-almost constantly

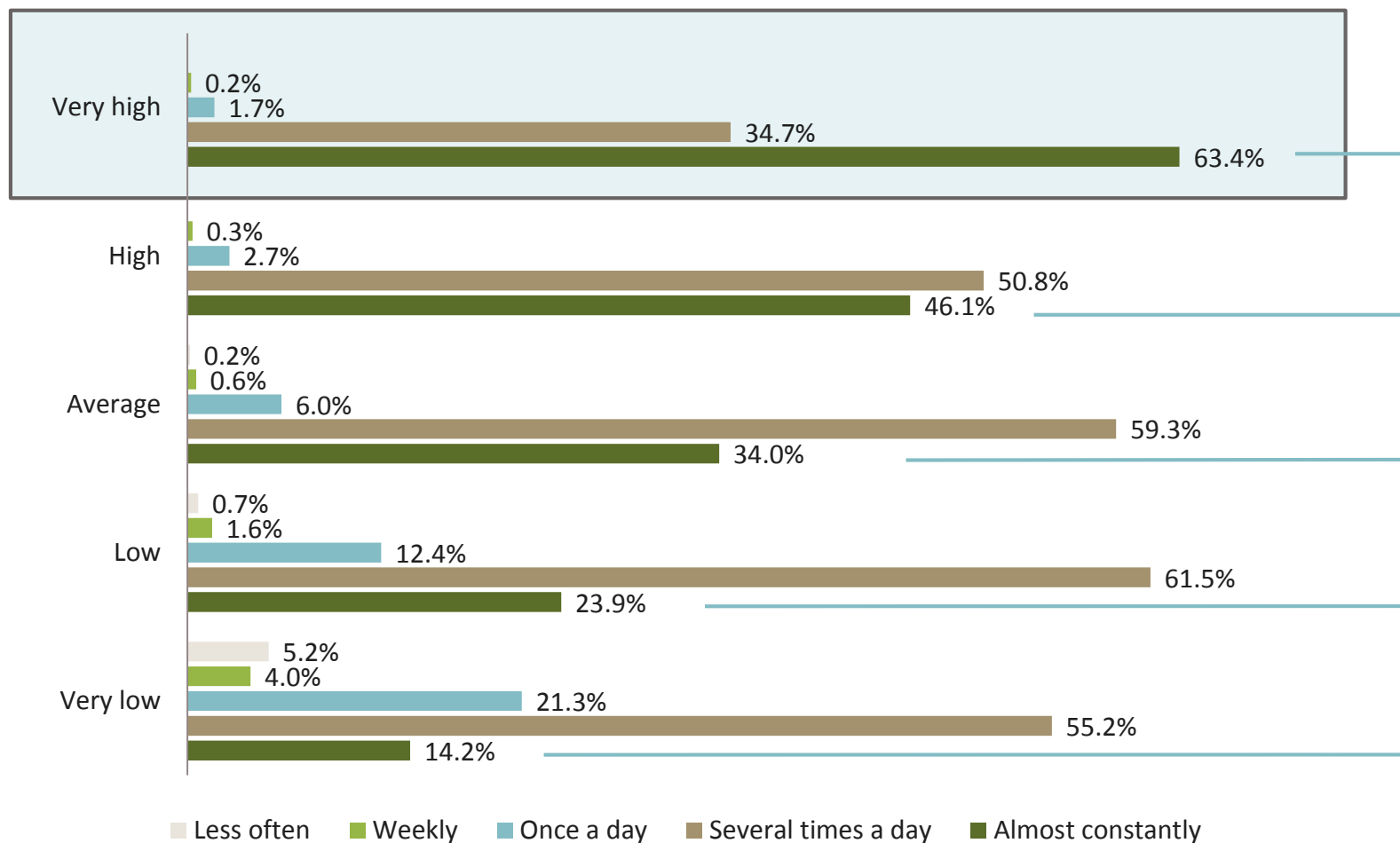
Education is still a major factor in Internet use



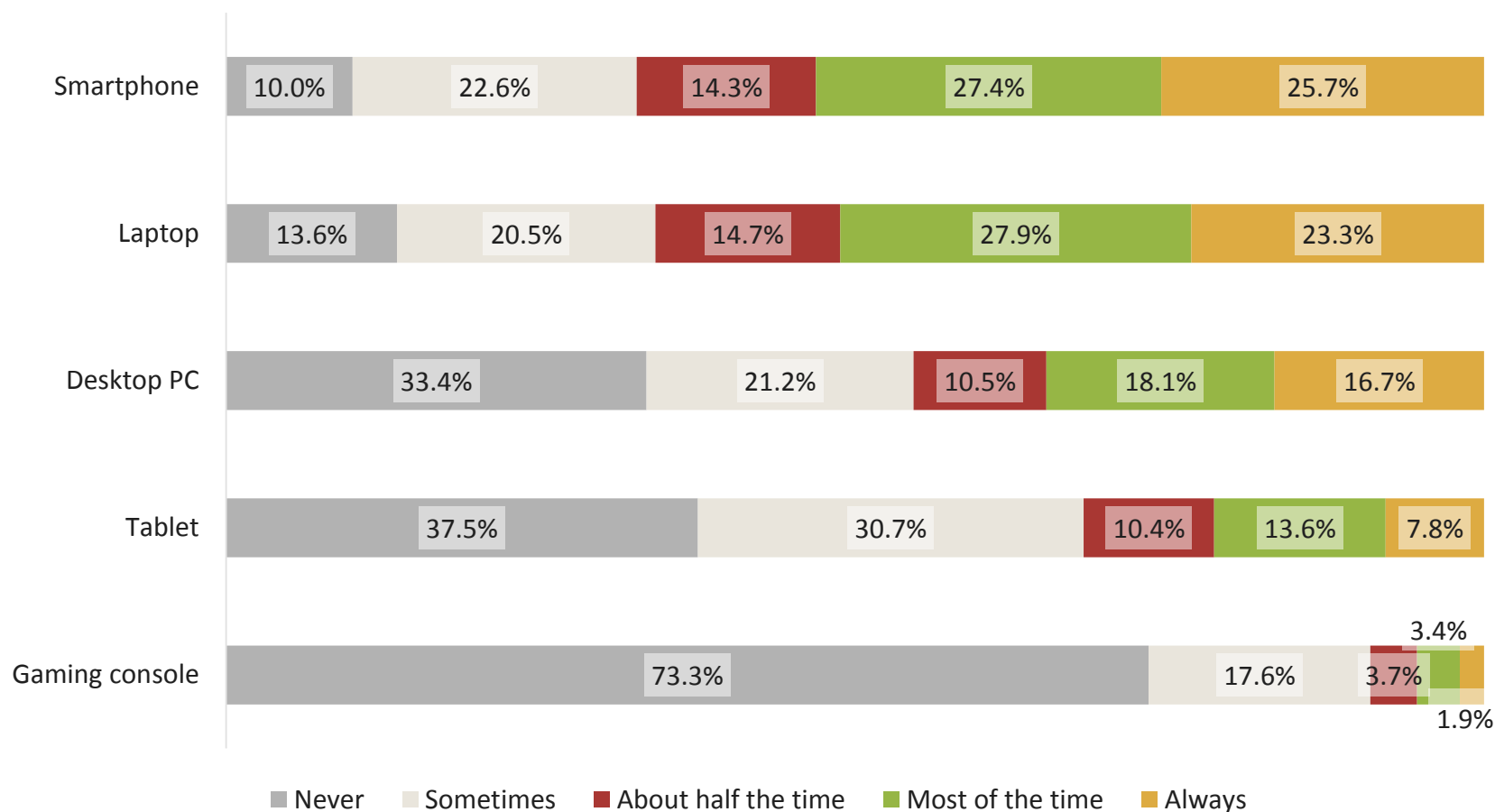
...as is income



Internet skills closely related to use frequency



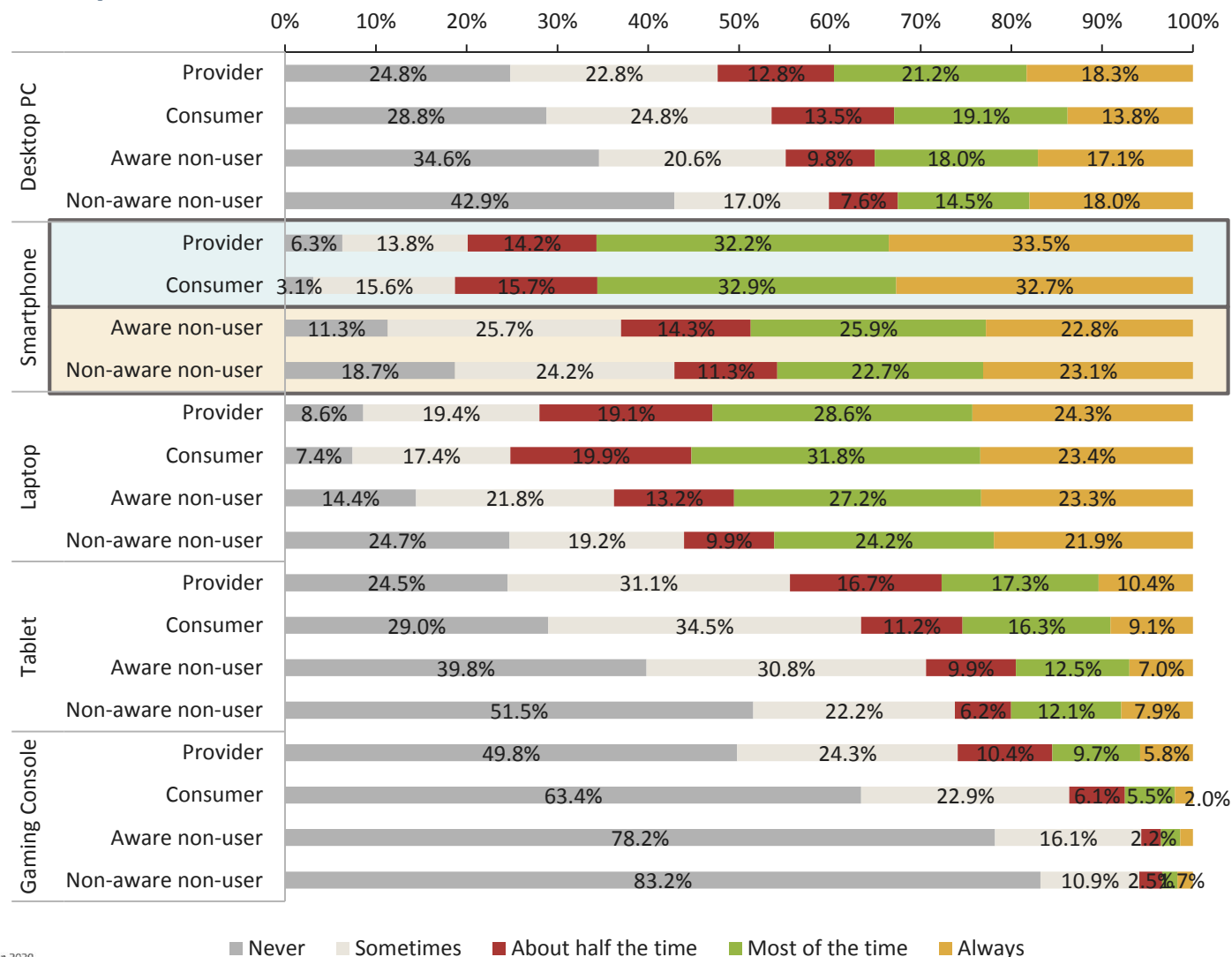
Smartphone most frequently used access device: potential prerequisite to sharing participation



N = 6111

Internet use frequency: 1-5 scale with 1-less often, 2-weekly, 3-once a day, 4-several times a day, 5-almost constantly
Quartiles cut the distribution of income in approximately even quarters

Smartphone use distinguishes participants and non-participants



Key Insights into Sharing Preconditions

- **Daily – and especially constant – Internet use is much more common among providers and consumers of sharing services than among non-users.** Non-aware non-users use the Internet less frequently than all other groups, while providers have the largest share of “always-on” Internet users.
- As participation in the sharing economy is clearly linked to Internet use, **a number of digital divides need to be taken into account: an age divide, a gender divide, an educational divide, an income divide and a skills divide.** In other words: Younger, well-educated, higher income, male and highly skilled individuals use the Internet most frequently and are more engaged in the sharing economy.
- **Smartphone use most clearly distinguishes participants from non-participants in the sharing economy,** with consumers being slightly more avid users than providers. Smartphone use is, again, especially frequent among younger, well-educated, higher income and highly skilled Europeans.

5 Sharing Self-Efficacy of **Non-Users**

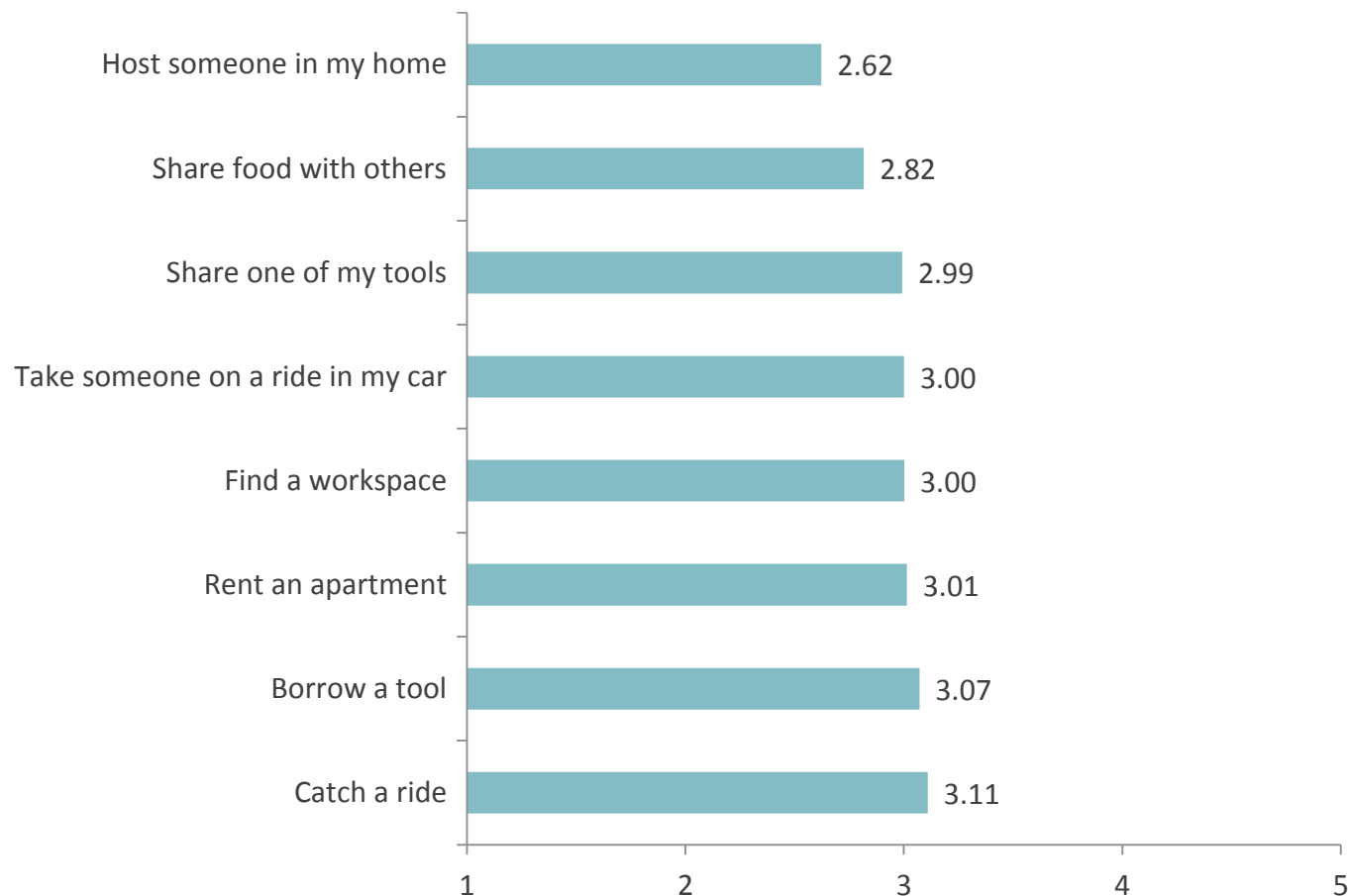
Do non-participants lack confidence in their ability to use sharing services?



Non-Aware Non-Users face a large Skills Divide

While non-participants generally have relatively low confidence in their ability to use sharing services, this is especially obvious among those unfamiliar with the sharing economy.

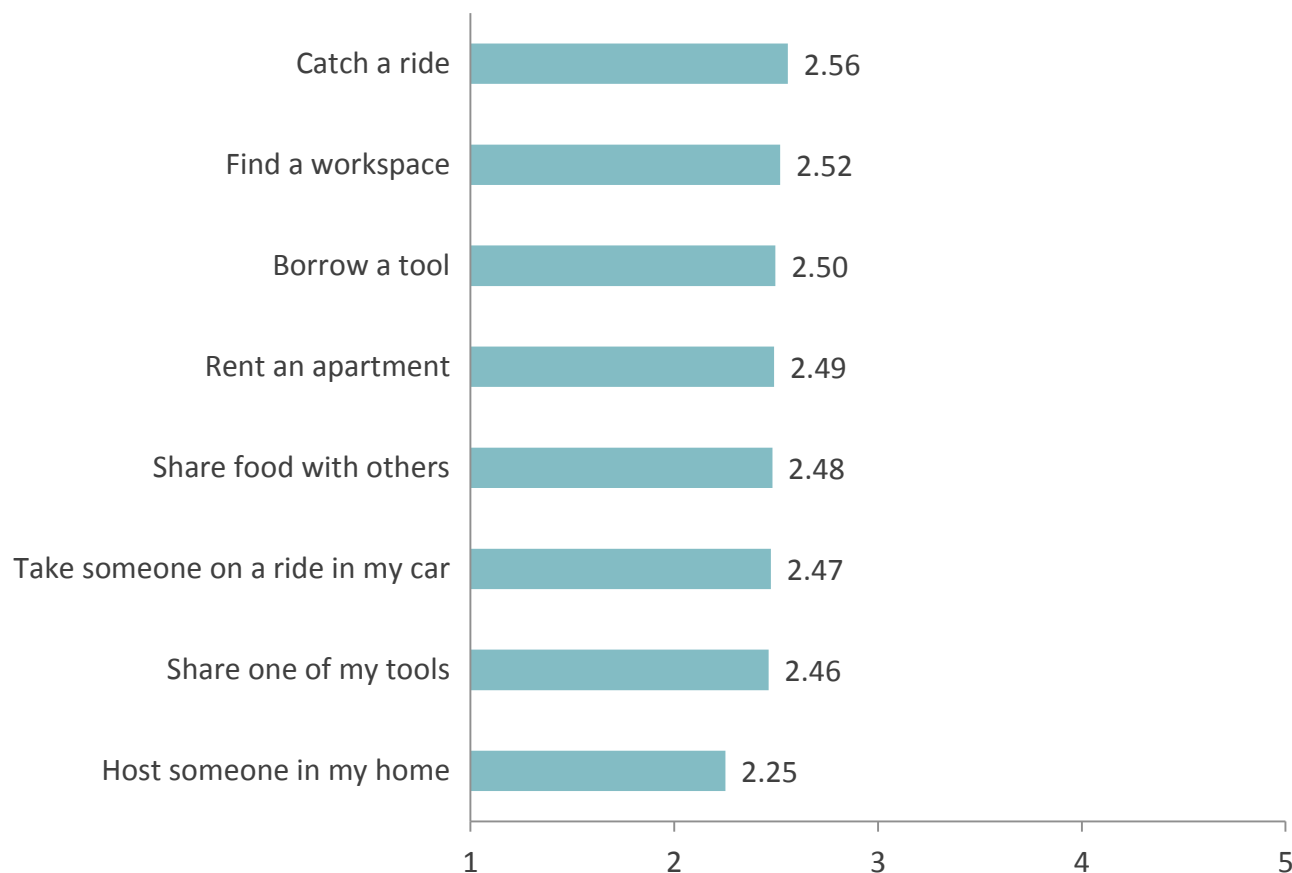
Aware non-users are relatively confident they could consume sharing services



N = 3818, aware non-users; Arithmetic means are displayed

1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree

Non-aware non-users are less confident in their skills, even in terms of consumption



N = 594, non-aware non-users, Arithmetic means are displayed

1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree



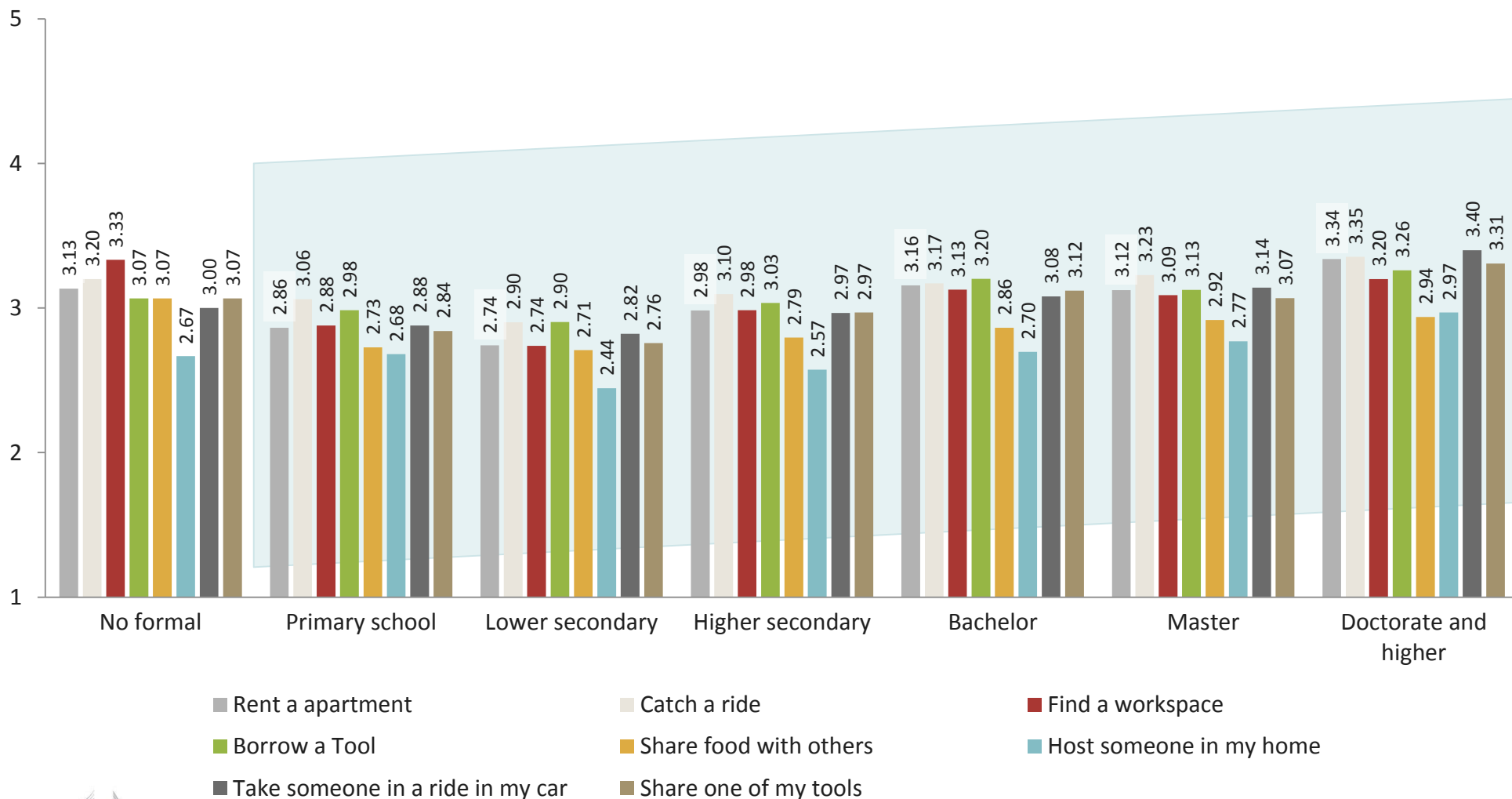
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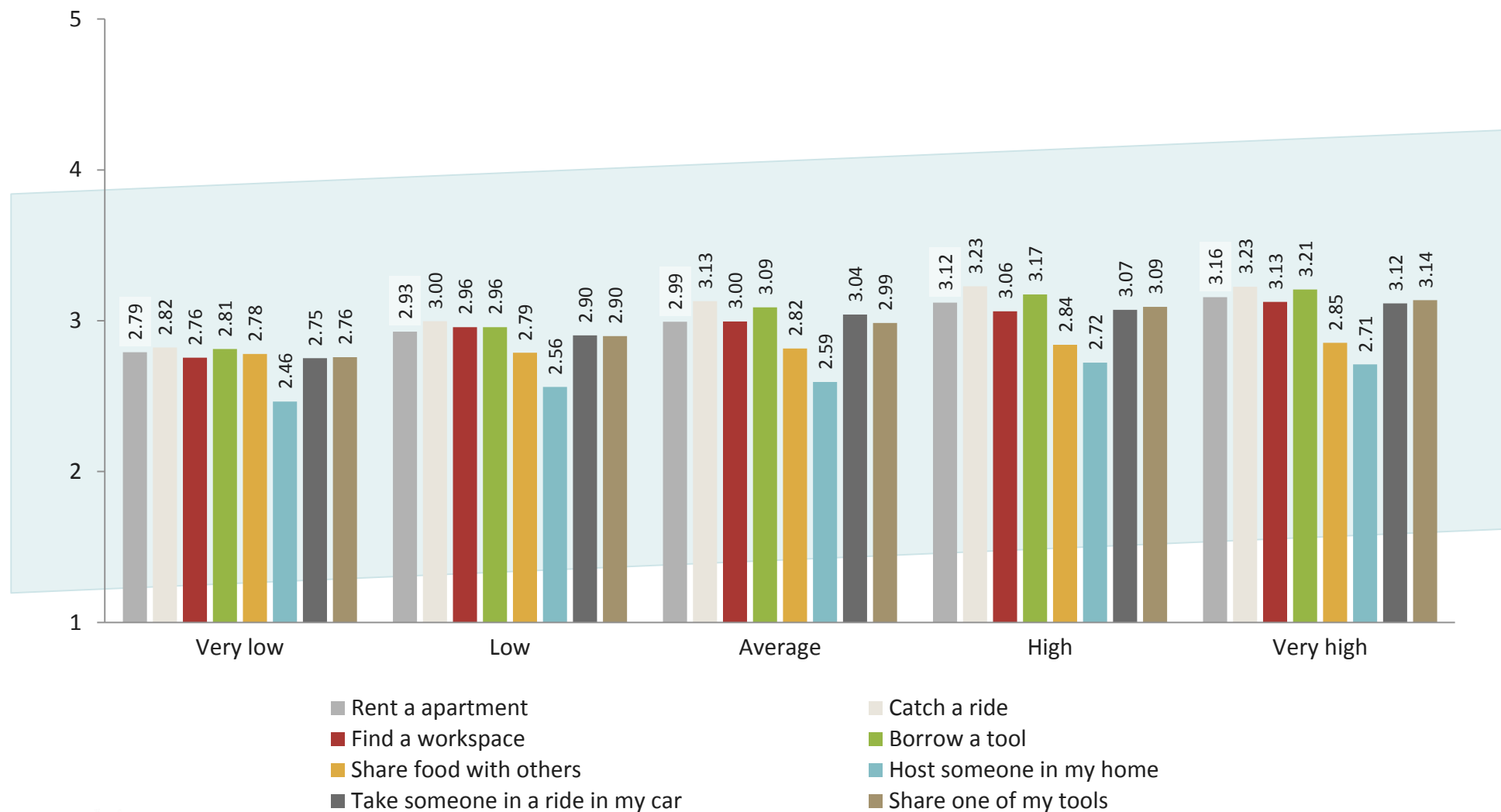
Italian, Danish and Portuguese aware non-users are relatively confident in their use skills

	Rent a apartment	Catch a ride	Find a workspace	Borrow a tool	Share food with others	Host someone in my home	Take someone in a ride in my car	Share one of my tools
Denmark	3.19	3.30	3.03	3.09	2.97	2.96	3.10	3.03
France	2.90	3.07	2.73	3.14	2.65	2.54	3.07	3.01
Germany	2.62	3.04	2.47	2.91	2.54	2.25	2.86	2.78
Ireland	3.30	3.08	3.19	3.10	2.82	2.88	2.85	3.03
Italy	3.18	3.20	3.20	3.03	2.87	2.69	3.16	3.10
Netherlands	2.81	2.90	2.83	3.00	2.82	2.58	2.93	2.92
Norway	3.21	3.19	2.81	3.19	2.75	2.64	3.12	3.07
Poland	2.92	3.40	3.40	3.15	3.20	2.75	3.27	3.01
Portugal	3.26	3.16	3.39	3.21	2.96	2.68	3.04	3.17
Spain	2.97	2.91	3.13	2.99	2.75	2.37	2.92	2.94
Switzerland	2.76	3.05	2.81	3.07	2.68	2.48	2.96	3.00
UK	3.04	3.02	2.92	2.94	2.73	2.66	2.74	2.84
Total	3.01	3.11	3.00	3.07	2.82	2.62	3.00	2.99

With the exception of young pupils, self-efficacy rises with education



Sharing self-efficacy rises with Internet skills



Key Insights on the Self-Efficacy of Non-Users

- Aware non-users are more confident in their ability to use sharing services than non-aware non-users – particularly for consumptive purposes. Interestingly, while actual participation in the sharing economy focuses primarily on car- and home-sharing, non-participants focus more on tasks such as borrowing a tool or finding a workspace.
- While self-efficacy doesn't significantly vary among non-aware non-users, we find that **among aware non-users, sharing self-efficacy is related to general Internet skills**, with more educated individuals showing more of both.
- **Low sharing self-efficacy among non-participants could constitute an obstacle to participation.** It is, however, especially weak among the group of non-aware non-users, who are characterized by higher age, lower education, lower income, low Internet skills and less frequent Internet use.

6 Reasons for Non-Participation in the Sharing Economy

Reasons for non-participation given by those who abstain from the sharing economy



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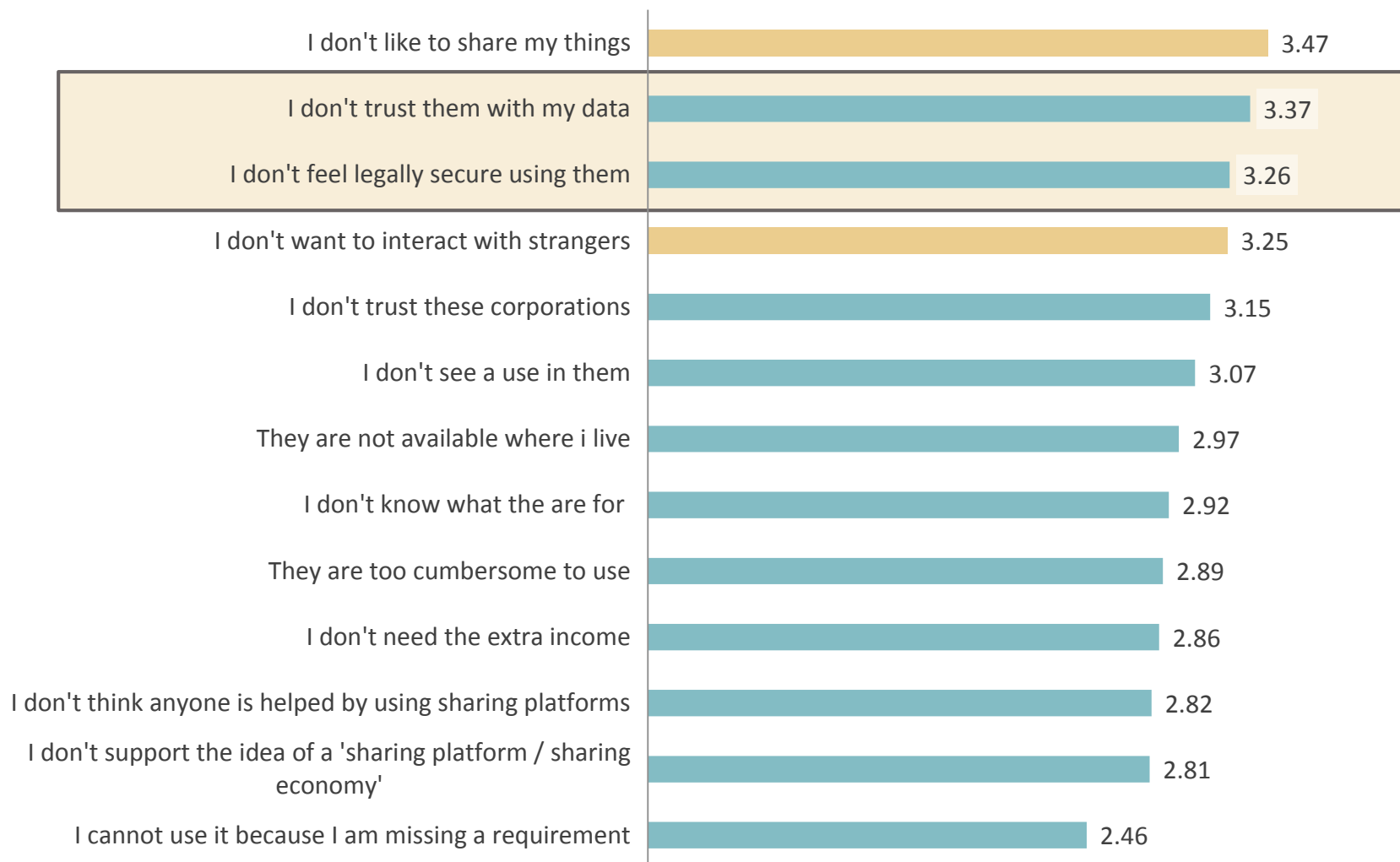
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Privacy and Legal Concerns constitute Key Obstacles

Aside from negative attitudes towards using other people's items and towards interacting with strangers, insecurity in terms of privacy protection and legal standing are key reasons for abstaining from providing and consuming sharing services.

Privacy concerns and legal concerns key reasons for not providing sharing services



Reasons for non-use generally more important for low-skilled users

Skill Index		I don't see a use in them	I don't know what they are for	I don't trust them with my data	I don't feel legally secure using them	They are not available where I live	They are too cumbersome to use	I cannot use it because I am missing a requirement
	Very low	3.45	3.53	3.57	3.55	3.16	3.27	2.94
	Low	3.17	3.16	3.44	3.34	3.03	3.01	2.66
	Average	3.03	2.95	3.37	3.27	2.95	2.89	2.46
	High	2.98	2.72	3.32	3.20	2.98	2.78	2.29
	Very high	2.89	2.41	3.23	3.03	2.81	2.60	2.09
	Total	3.07	2.92	3.37	3.26	2.97	2.89	2.46

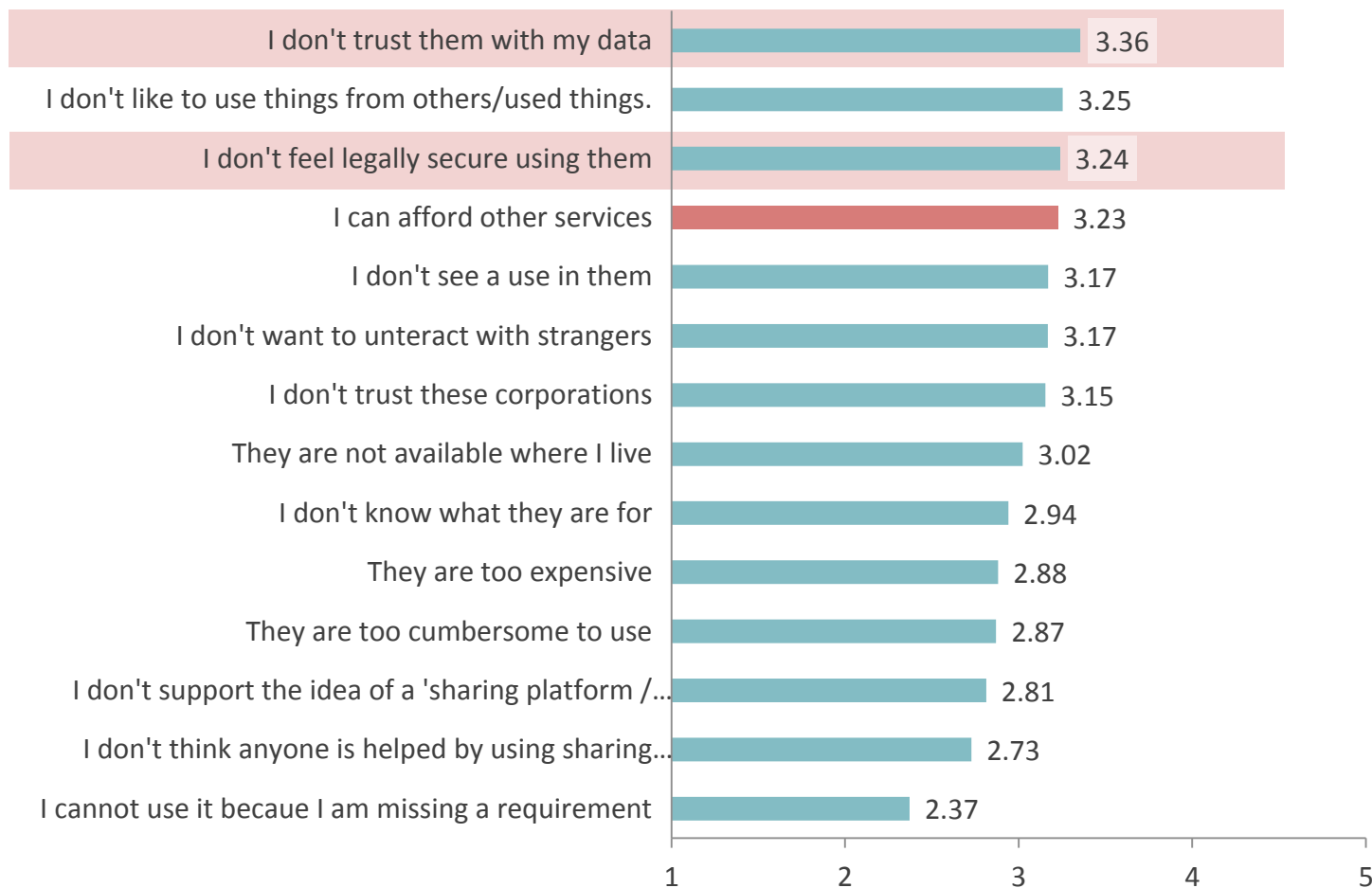
*N = 3818; Arithmetic means for providing by Internet skills are displayed
1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree*

Reasons for non-use generally more important for low-skilled users (continued)

Skill Index		I don't like to share my things	I don't need the extra income	I don't want to interact with strangers	I don't think anyone is helped by using sharing platforms	I don't trust these corporations	I don't support the idea of a sharing platform/economy
	Very low	3.66	3.06	3.54	3.20	3.45	3.24
	Low	3.45	2.91	3.30	2.96	3.23	2.96
	Average	3.43	2.78	3.24	2.79	3.11	2.76
	High	3.48	2.87	3.19	2.71	3.07	2.69
	Very high	3.48	2.86	3.11	2.62	3.05	2.63
	Total	3.47	2.86	3.25	2.82	3.15	2.81

*N = 3818; Arithmetic means for providing by Internet skills are displayed
1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree*

Users avoid sharing services when they can afford alternatives



N = 3818; Arithmetic means for consuming are displayed

1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree



Again, lower skilled non-consumers see more obstacles to using sharing services

	I don't see a use in them	I don't know what they are for	I don't trust them with my data	I don't feel legally secure using them	They are not available where I live	They are too cumbersome to use	I cannot use it because I am missing a requirement
Very low	3.57	3.67	3.60	3.47	3.18	3.25	2.82
Low	3.26	3.17	3.42	3.36	3.06	3.00	2.57
Average	3.10	2.94	3.35	3.23	2.99	2.84	2.36
High	3.10	2.75	3.28	3.15	3.04	2.78	2.23
Very high	3.06	2.43	3.24	3.05	2.91	2.65	2.03
Total	3.17	2.94	3.36	3.23	3.02	2.87	2.37

*N = 3818; Arithmetic means for consuming by Internet skills are displayed
1-5 scale with 1-strongly disagree, 2-somewhat disagree, 3-neither agree nor disagree, 4-somewhat agree, 5-strongly agree*

(continued)

	I don't like to use things from others/ Used things	They are too expensive	I can afford other services	I don't want to interact with strangers	I don't think anyone is helped by using sharing platforms	I don't trust these corporations	I don't support the ideas of a sharing platform/ economy
Very low	3.44	3.11	3.27	3.40	3.14	3.36	3.14
Low	3.32	3.00	3.24	3.25	2.90	3.25	2.98
Average	3.21	2.85	3.20	3.14	2.70	3.11	2.75
High	3.19	2.81	3.23	3.13	2.57	3.12	2.72
Very high	3.22	2.73	3.23	3.02	2.53	3.02	2.60
Total	3.25	2.88	3.23	3.17	2.73	3.15	2.81

*N = 3818; Arithmetic means for consuming by Internet skills 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 Non-Participation

- A general dislike for sharing or using other peoples' objects ranks very highly among the reasons given for non-participation, as does resistance to interacting with strangers.
- Non-participants also rarely say that they are excluded from sharing because they lack a necessary requirement (such as a car, space or object to share, an access device or credit card).
- **Higher education and income individuals do not need the additional income from sharing** or can afford to use other, presumably more comfortable services. Lower-education and -income individuals generally seem more insecure towards the sharing economy.

7 Outcomes of Participation in the Sharing Economy

A look at non-economic (consumers and providers) and economic (providers) outcomes of participation



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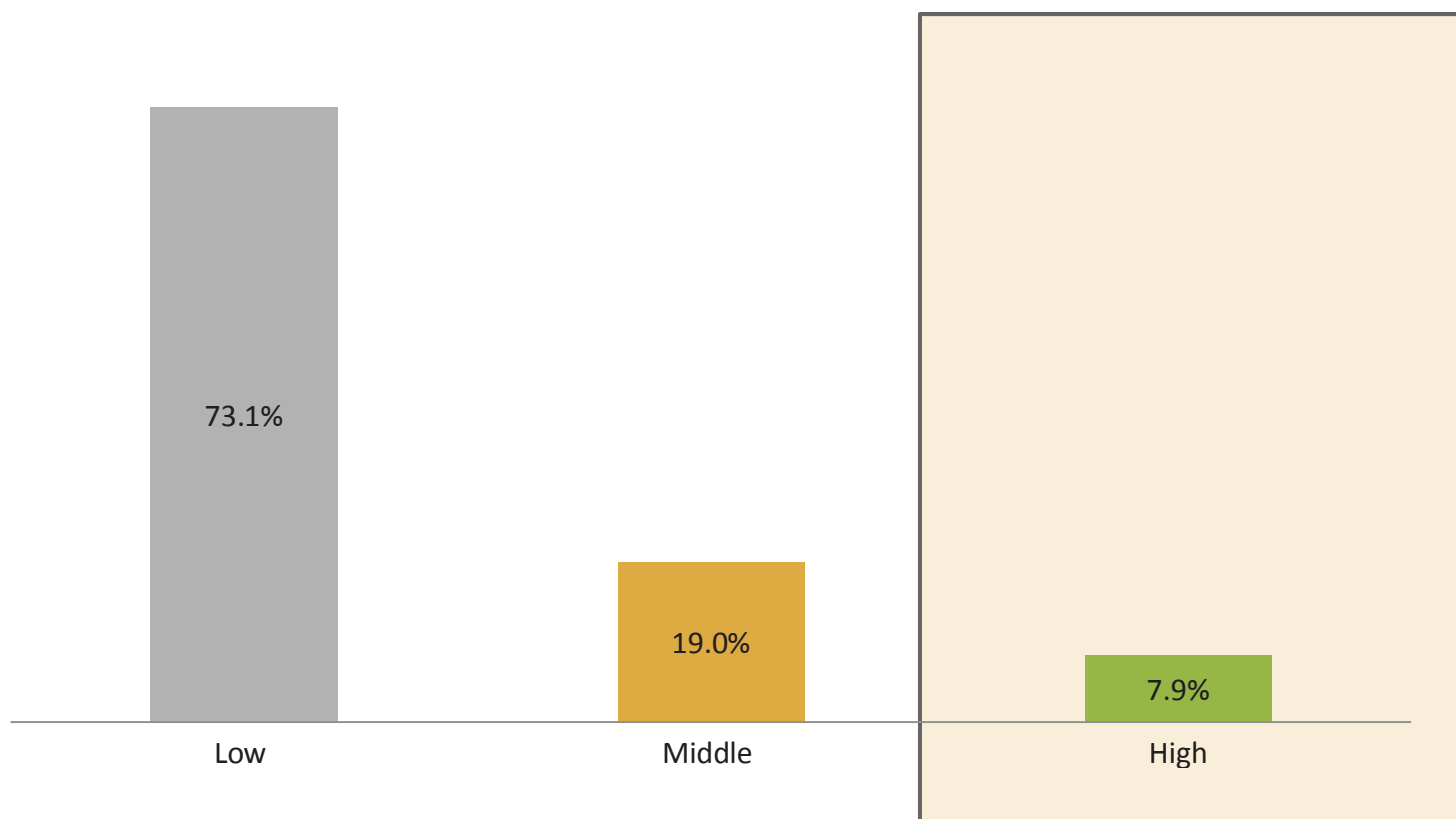
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Few Provide Professionally, Most Enjoy the Side-Income

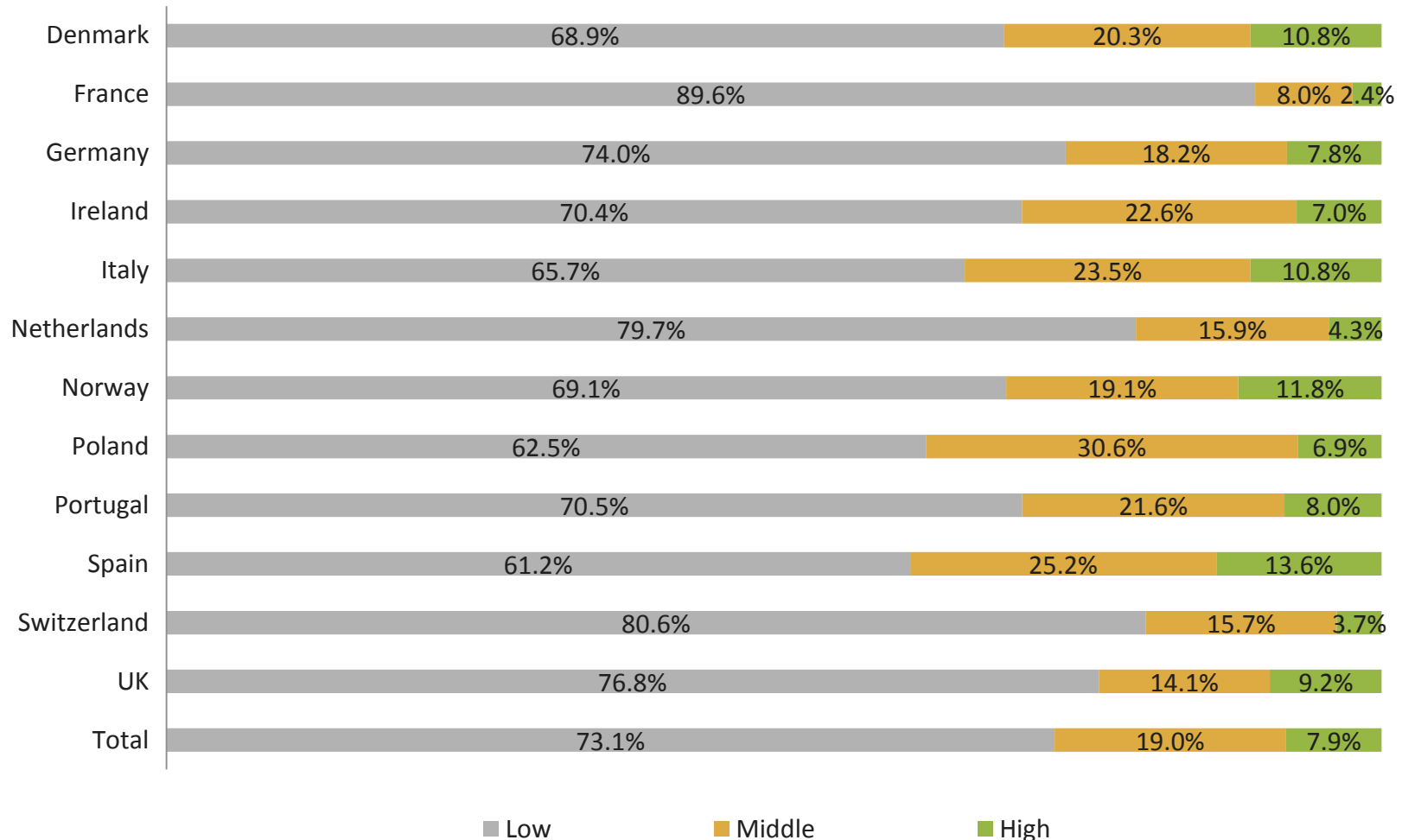
Generally, there is little reciprocity involved in the sharing economy, few ever share repeatedly with each other. Among providers, most participate to earn a side-income. A few rely on sharing for their livelihood, however – and require particular attention.

Sharing economy consumers rarely reciprocate

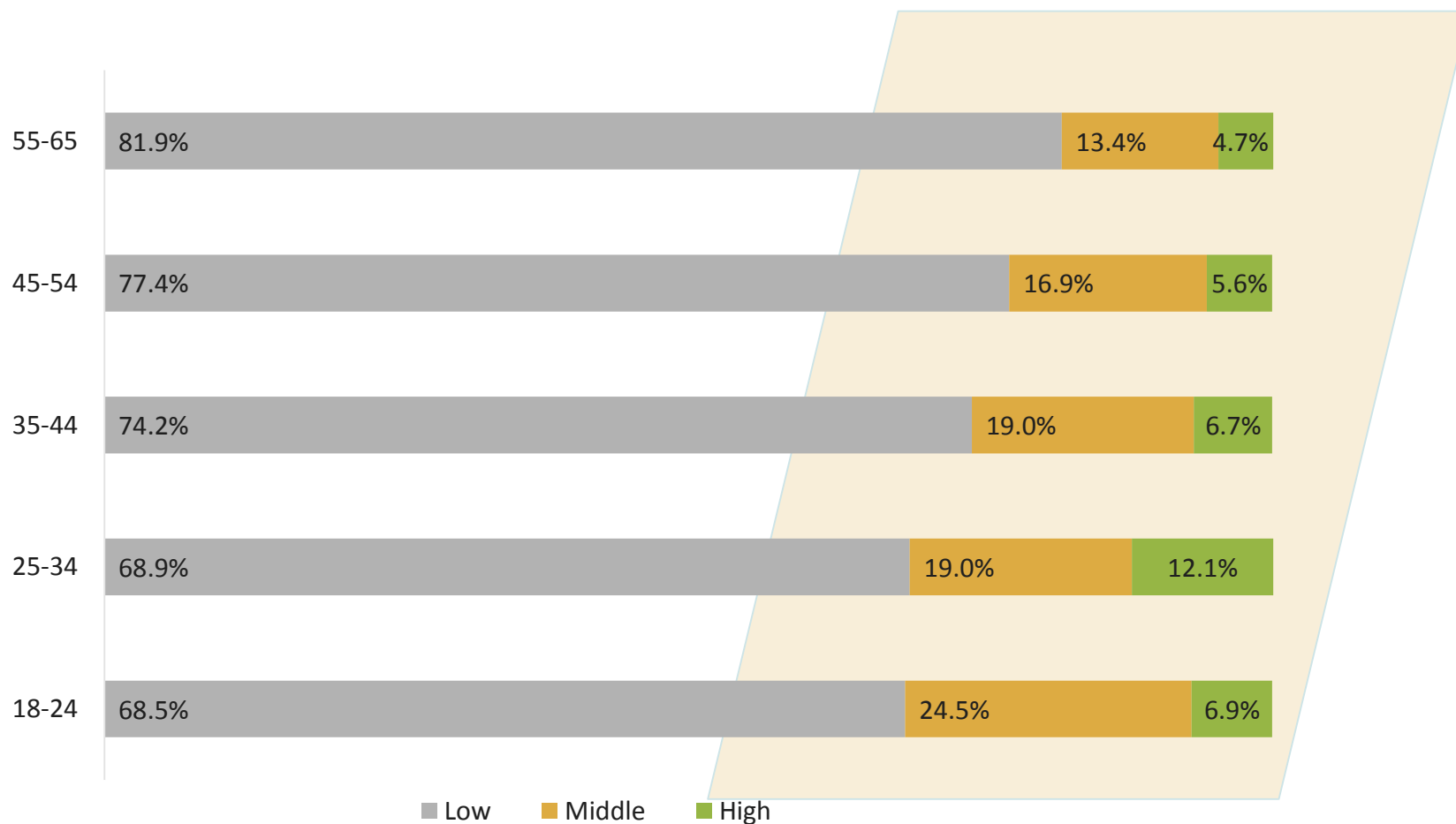


N = 1143, consumers
Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high

Low reciprocity is common...

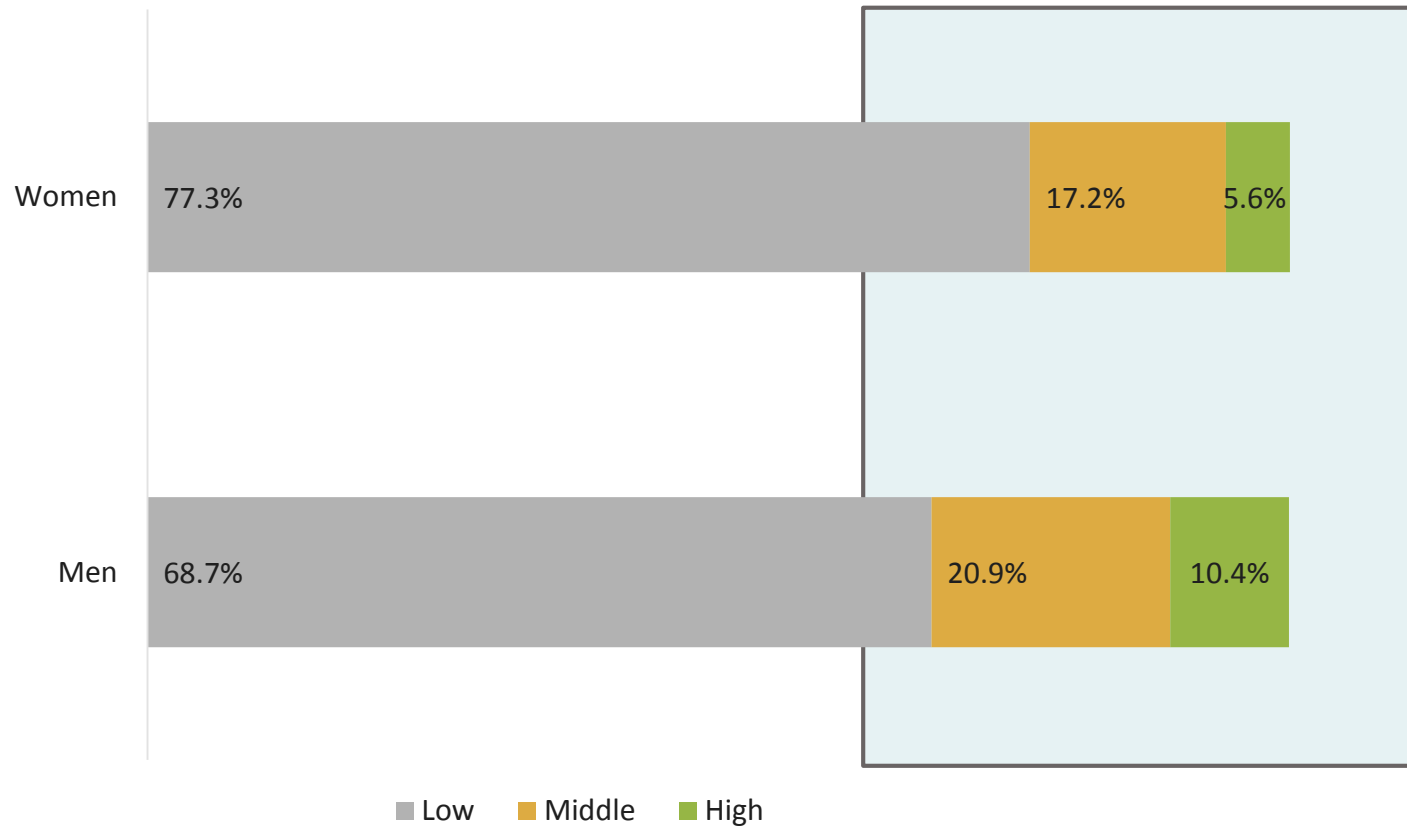


...but less common among 'millennials'



N = 1143, consumers by age group
Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high

Women reciprocate less than men



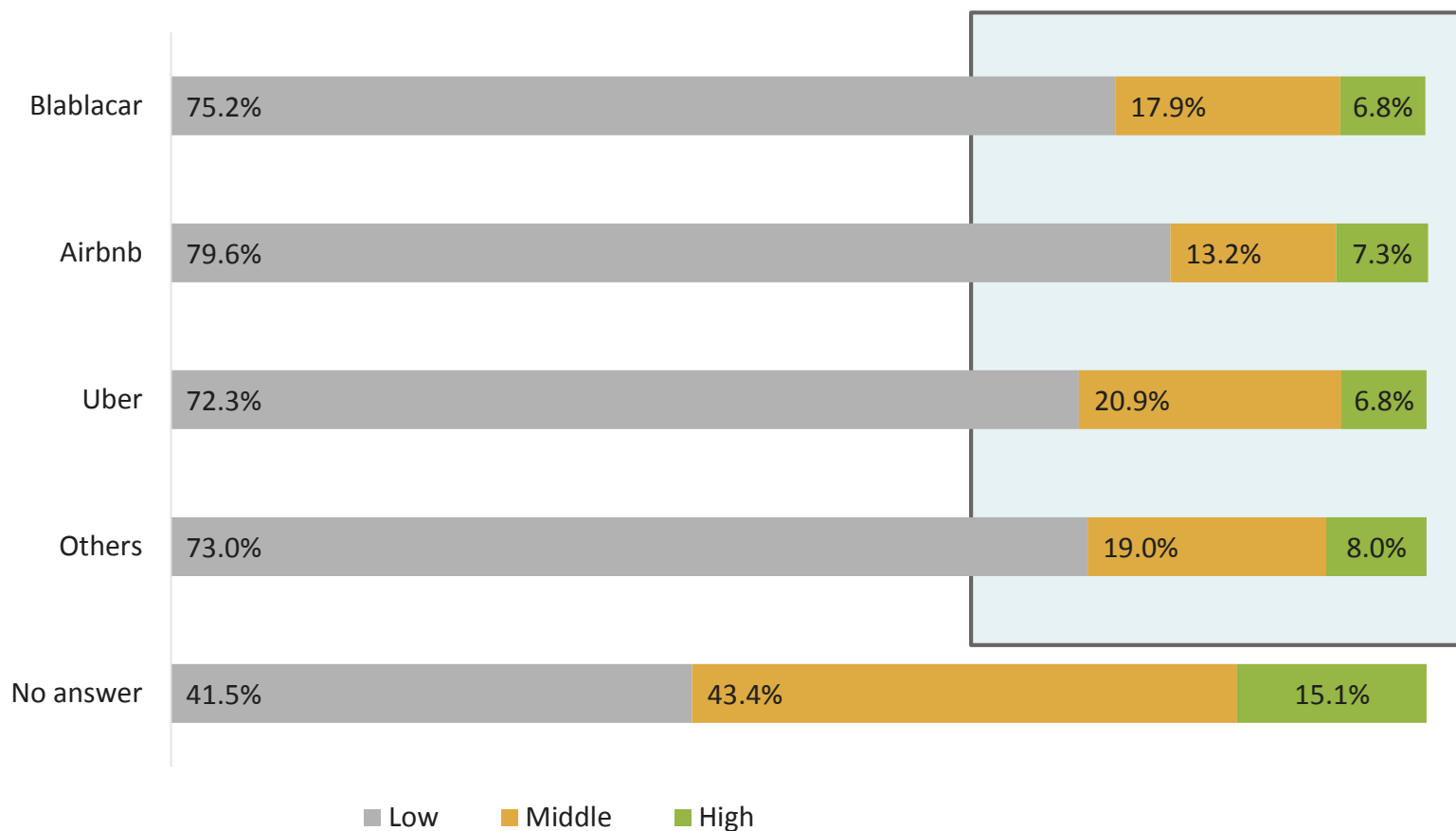
N = 1143, consumers by gender
Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high

Internet skills foster reciprocity

		Social Reciprocity Index		
		Low	Middle	High
Skill Index	Low	78.6%	78.6%	6.8%
	Average	75.8%	75.8%	6.3%
	Medium High	71.5%	71.5%	7.3%
	Highest	71.6%	71.6%	9.5%
	Total	73.1%	73.1%	7.9%

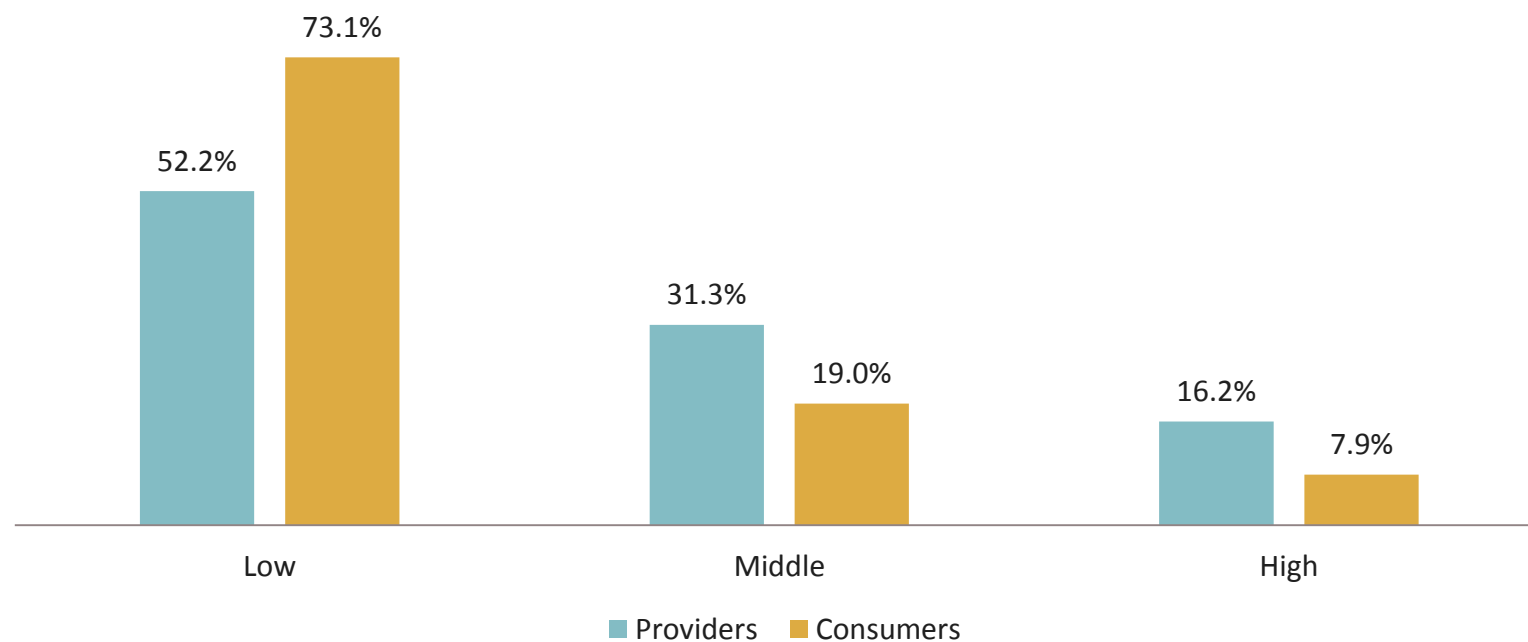
N = 1143, consumers by Internet skills
Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high
Skills index reduced by aggregating highest and lowest values

No effect of platforms on reciprocity



N = 1143, consumers by platform
Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high

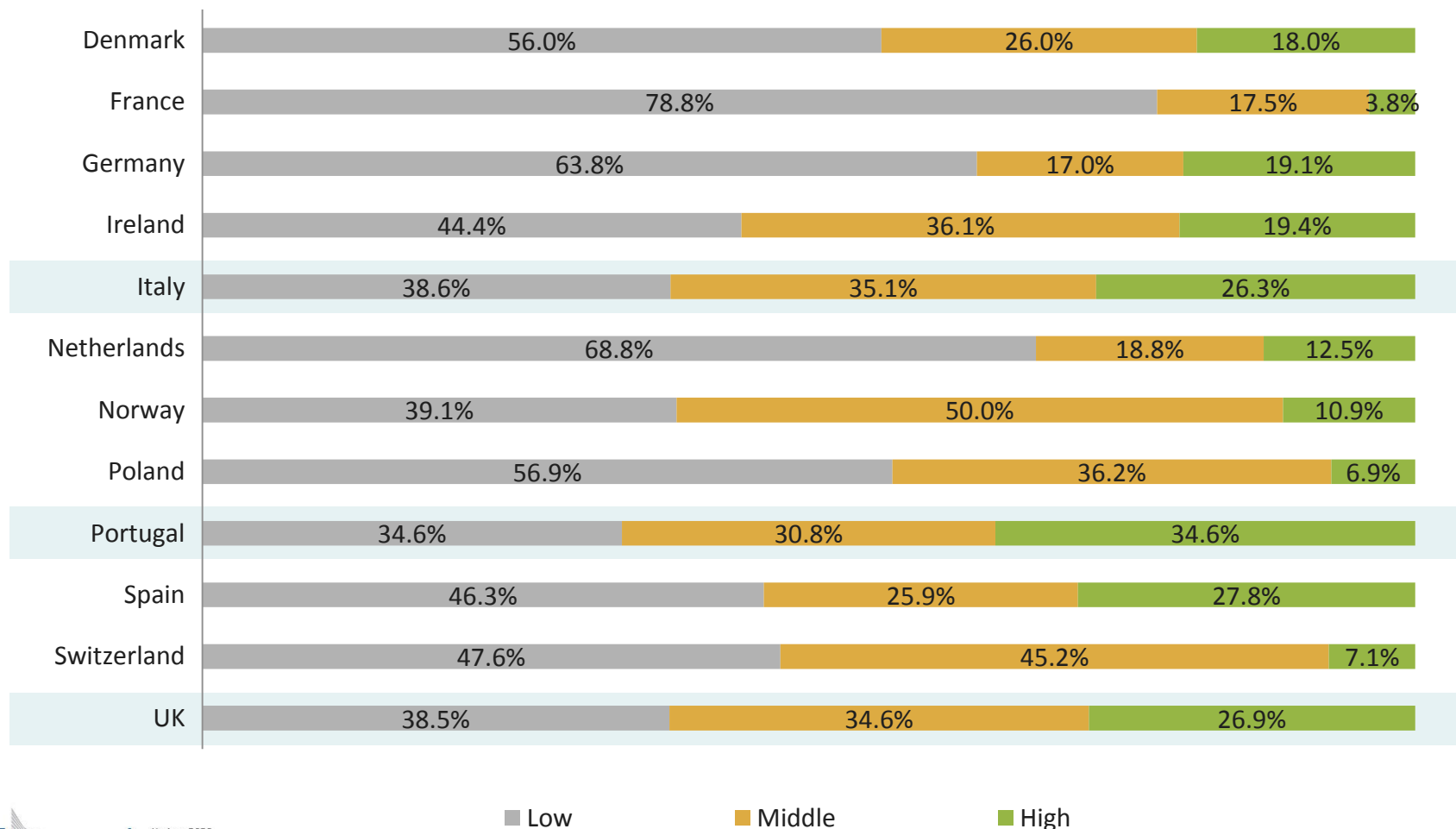
Providers reciprocate more than consumers



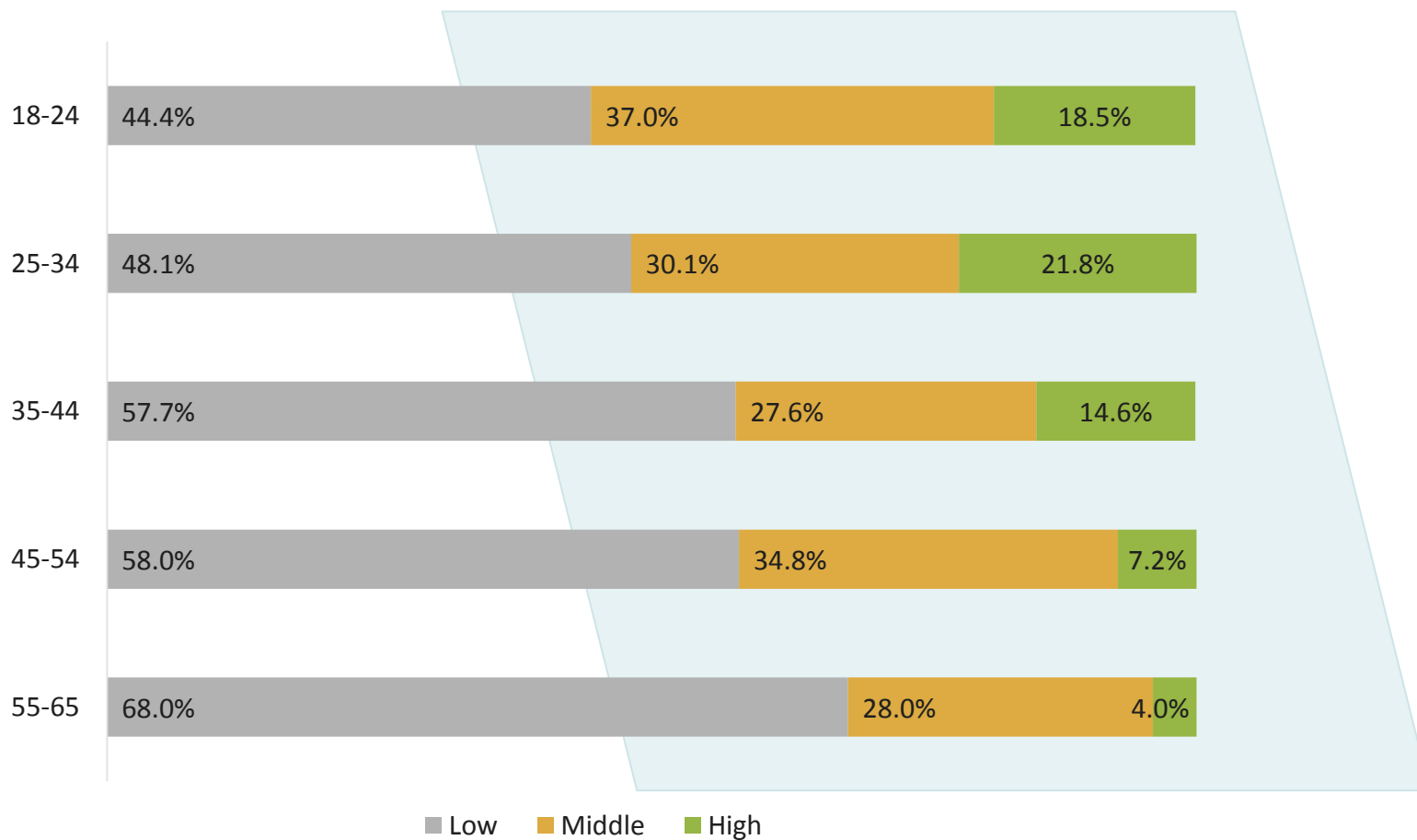
N = 1699

Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high

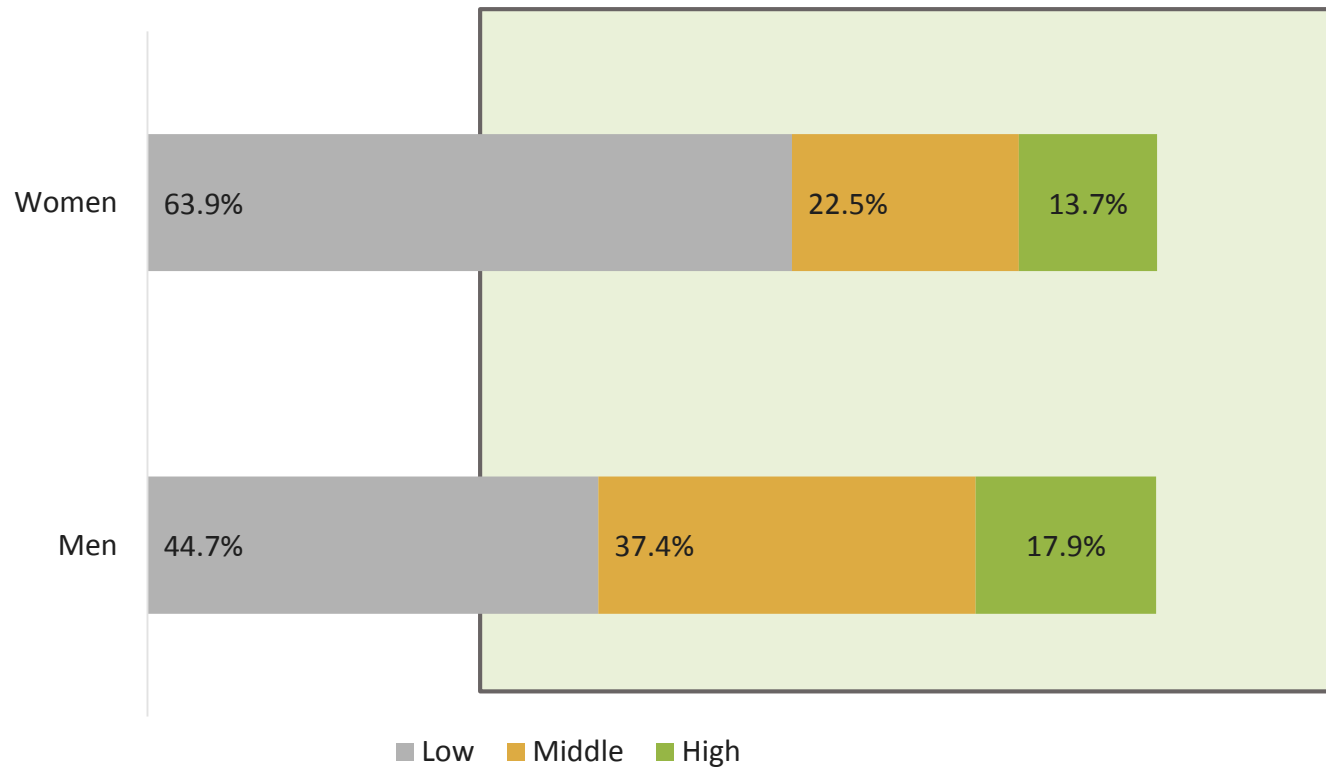
Reciprocity relatively high among Portuguese, British and Italian providers



‘Millennial’ providers also reciprocate more



Reciprocity more common among male providers



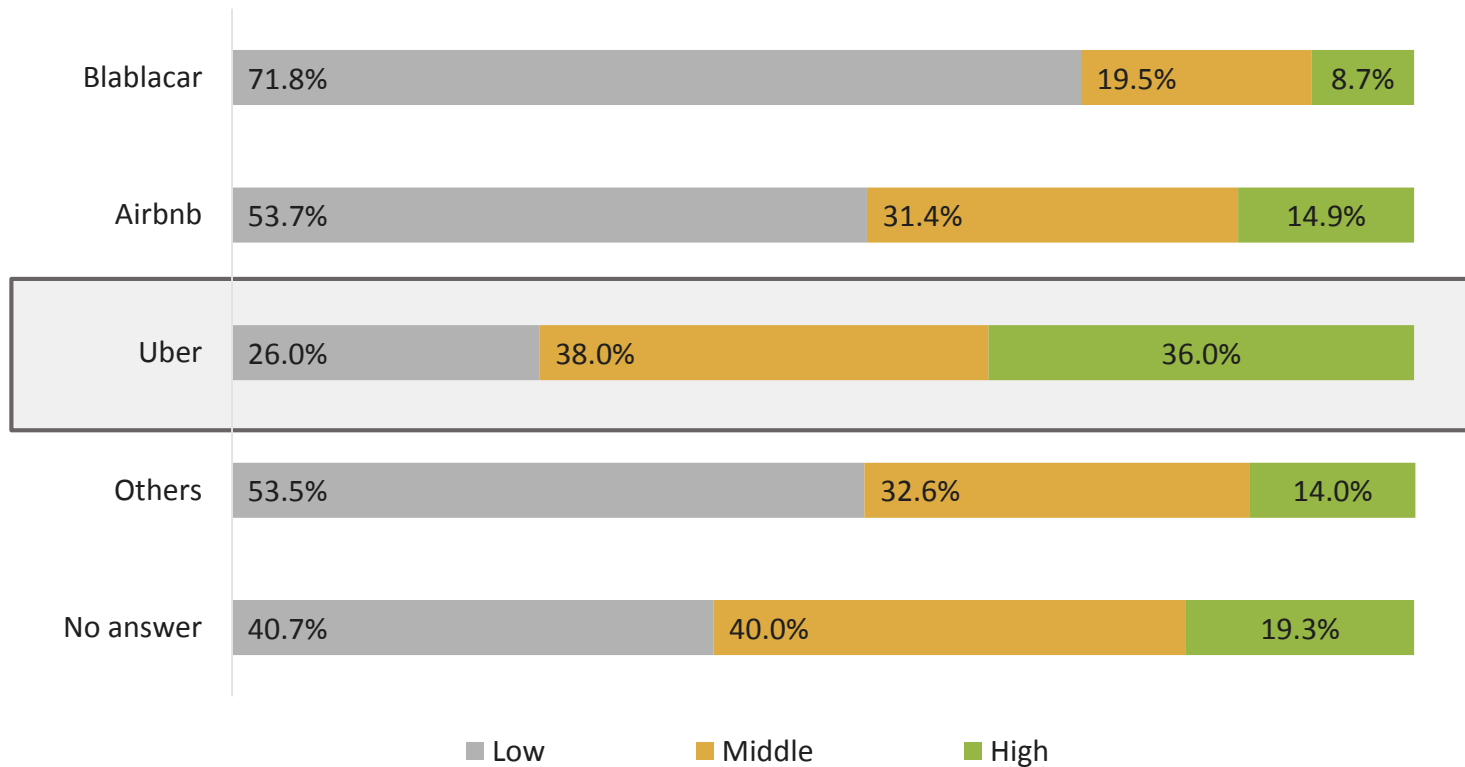
N = 556, providers by gender
Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high

Internet skills have a stronger effect for providers

		Social Reciprocity Index		
		Low	Middle	High
Skill Index	Low	67.3%	25.0%	7.7%
	Average	53.8%	36.6%	9.7%
	Medium High	52.0%	37.3%	10.7%
	Highest	47.8%	23.1%	29.1%
	Total	52.5%	31.3%	16.2%

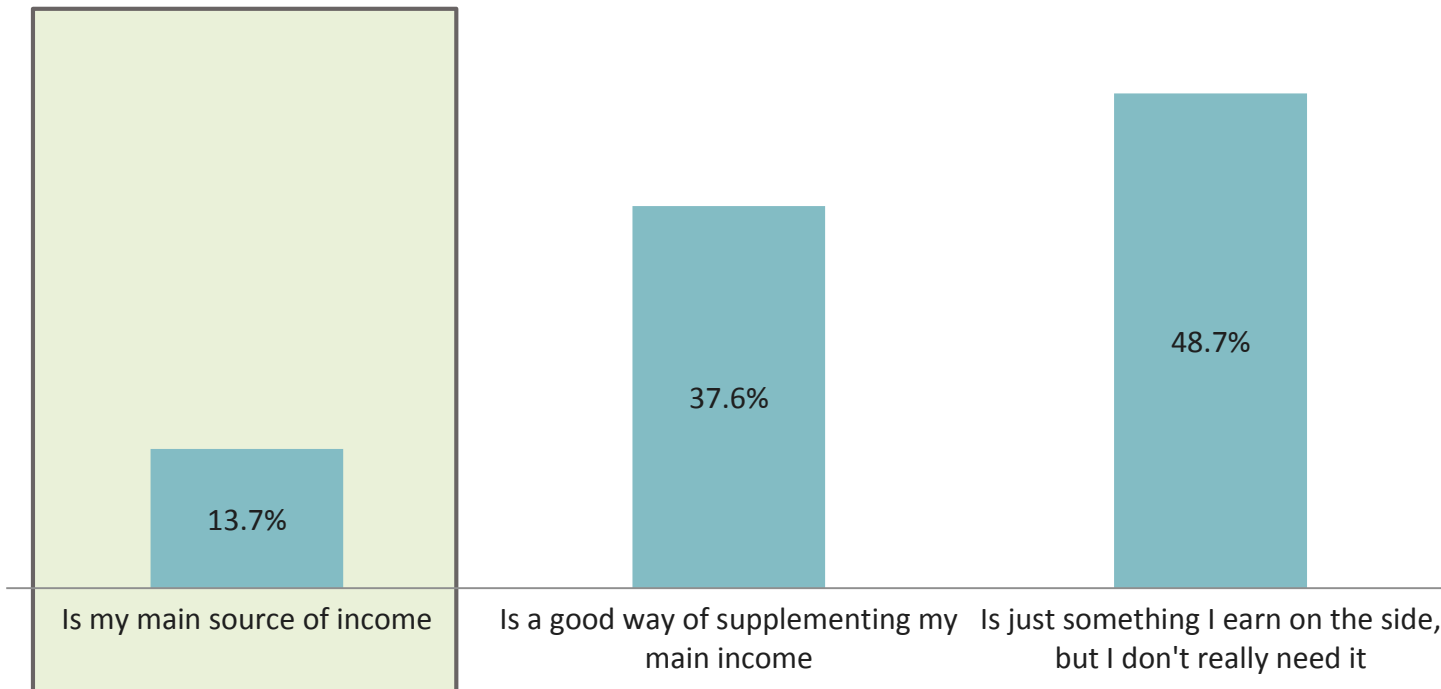
*N = 556, providers by Internet skills
Social reciprocity index):1-3 scale with 1-low, 2-middle, 3-high
Skills index reduced by aggregating highest and lowest values*

The Uber effect: professional reciprocity



N = 556, providers by platform
Social reciprocity index: 1-3 scale with 1-low, 2-middle, 3-high

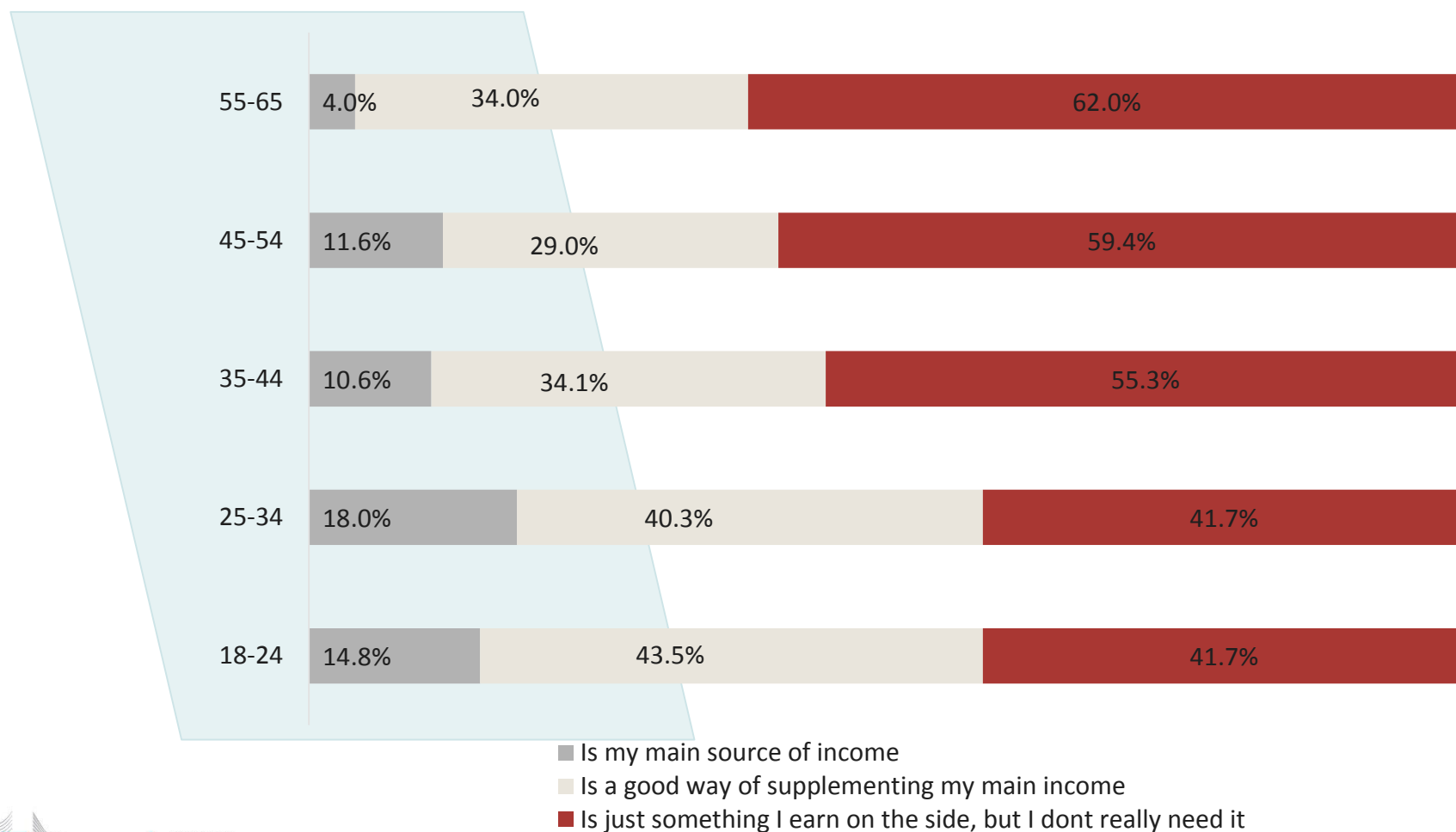
Economic outcomes: Few are 'professional sharers'



N = 556

Sample question: 'The income I get from providing on the sharing platform...'

Millennials are more likely to be 'professional sharers'



Professional sharing is a low-skilled job

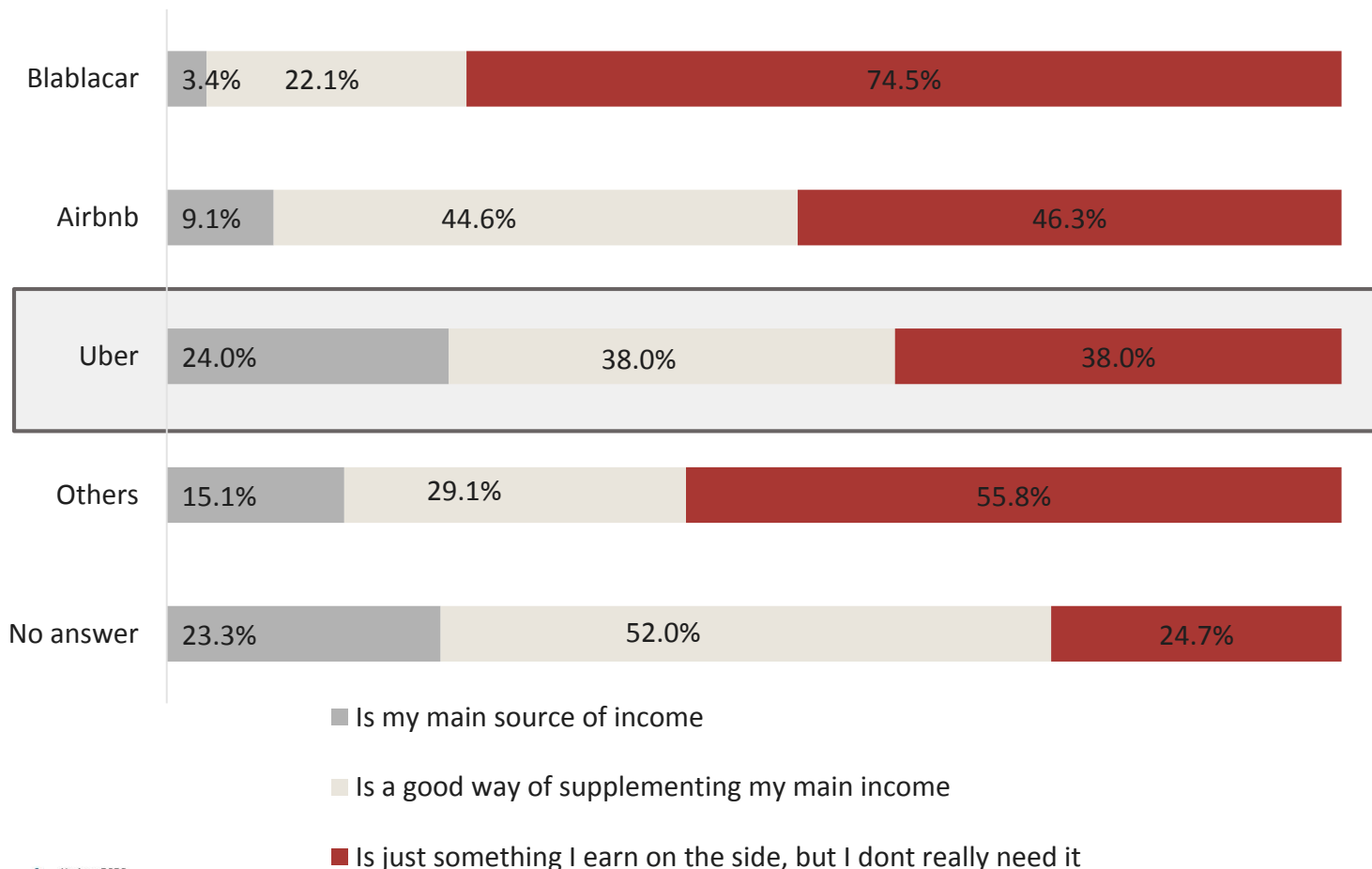
		Main source of income	Supplementing main income	Income earned on the side
Skill Index	Low	21.2%	36.5%	42.3%
	Average	17.2%	39.3%	43.4%
	Medium High	8.5%	46.9%	44.6%
	Highest	13.7%	27.5%	58.8%
	Total	13.7%	37.6%	48.7%

N = 556, providers by Internet skills

Sample question: „The income i get from providing on the sharing platform...“

Skills index reduced by aggregating highest and lowest values

'Uber' jobs and professional sharing



Key Insights on the Outcomes of Participation

- Across countries, we find that **consumers do not seem inclined to have repeated interactions with those met on sharing platforms**. Neither Internet skills nor the preferred platform (e.g., Airbnb, Uber, Blablacar) positively relate to reciprocity.
- Men have a slightly stronger preference for reciprocal relations, which may be related to issues of personal safety. Moreover ‘millennials’ (aged 18 to 34) seem to be more willing to entertain repeated exchanges with other users.
- **Providers are generally more willing to reciprocate** (particularly southern Europeans). However, this may be motivated by a desire foster a community of committed customers.
- Few providers exclusively rely on sharing services for their income. **Users with low Internet skills are more likely to be ‘professional sharers’**, implying that ‘professional sharing’ may be a low-skill (and low-income) occupation.

8

Conclusions



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Summary of Results

Participation Divide

Differences between participation and non-participation

- **Participants** are **younger, more educated, and higher-income** than non-participants.
- Participants are **more avid and skilled Internet users**, particularly in terms of **mobile** usage.
- Participation mostly in **car- and home-sharing**.
- **Privacy and legal concerns** are key **obstacles** to participation – aside from **dislike of used goods**.

Engagement Divide

Differences between consumers and providers

- **Consumers** are on average **more educated, higher income** and somewhat **older** than providers. They also have **higher Internet skills**.
- **Higher Internet skills** are related to **more perceived benefits** from sharing.
- Consumers are primarily driven by **financial benefits and fun**. They stop participating when they can afford more comfortable alternatives.

Provider Divide

Differences between professional and occasional providers

- Most providers participate to earn a side income – they do not rely on sharing for a livelihood.
- The largest share of **‘professional sharers’** is found in **car sharing** (Uber) and among **younger** participants. They tend to be **lower-SES**.
- Professional sharers are especially keen to **generate social capital**, i.e. to foster a customer base.

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