

Practice and Perception of Peer-to-Peer Sharing

Results of a qualitative survey in Germany

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1. The PeerSharing project
2. Results of an exploratory pre-study
3. Conclusions

THE PEER-SHARING PROJECT

Baseline Study & Inventory

Desk Research

Governance Analysis

Case studies

Practice Dialogue & Transfer of Results

Practitioner and stakeholder dialogues
User dialogue via Utopia and Ouishare

Case Studies with Business Partners



How sustainable is online peer-to-peer sharing?

Analysis of Consumer Behavior

Qualitative pilot study
Representative consumer survey
User survey

Perspectives for Business Models

Focus groups with users

Scenario- / Potential Analysis

Scenario workshops
Scenario-writing

Life Cycle Assessment

LCA using the example of the business partners

Analysis of consumer behavior

exploratory
pre-study



users



non-users

autumn/2015

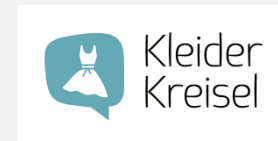
representative
survey



online
N=2.000

spring 2016

user
survey



autumn 2016

THE EXPLORATORY PRE-STUDY

- **Objectives**
 - Explore the practice and perception of P2P sharing
 - Provide empirical insights feeding into the preparation of the forthcoming large-scale surveys
- **Approach**
 - 32 semi-structured telephone interviews
 - 16 interviews with users of P2P sharing platforms (Ø 25 min)
(4 interviews per business partner: Wimdu, Kleiderkreisel, Flinc, Drivy)
 - 16 interviews with non-users (Ø 17 min)
 - Fieldwork duration: July to October 2015
 - Recording and transcription of the interviews, analysis with MAXQDA

- **Interview guideline**
 - Familiarity the term „sharing economy“
 - General attitudes towards the sharing economy
 - Assessment of social and environmental impacts of P2P sharing
 - Experience with P2P sharing and impact on everyday consumption
 - Future intended use
 - Motivations for and barriers to a (possible) broader future use of P2P sharing platforms

- **Definition of „sharing economy“ in interview guideline**

„Sharing is about using everyday stuff, such as tools, cars, flats, together with other people. Through sharing people can use things they don't own themselves and they can offer things they do not use at the moment to others.

A couple of years ago online platforms have started to offer such sharing services. They enable the sharing of stuff between strangers.

Examples are internet platforms for private ride sharing or car sharing. Furthermore, there are online marketplaces for sharing of private accommodation or swapping and trading of second hand clothing.“

- **Most interviewees are familiar with the term “Sharing Economy”**
 - Most commonly defined (unaided) as “sharing of private stuff”
 - Most prominent example (both groups): car sharing
 - Popular platforms mentioned: Airbnb, eBay, Couchsurfing (both groups)
 - Non-users describe practices: swapping events, sharing of food, sharing of tools, ride- and bikesharing, repair cafes

- **Users and non-users alike show a positive attitude towards P2P sharing**
 - Financial benefits
 - Positive social effects
 - Environmental gains
- **Nearly all users have made only positive experiences with the platforms**
 - More economical consumption (peer consumer: access and affordability; peer provider: additional income)
 - More social interaction
 - Importance of rating systems and insurance services
 - Environment is a driver only for a very few

Attitudes towards the sharing economy (2)



- All non-users assess sharing generally positive
 - Advantages of the concept
 - Financial benefits
 - Access to broader range of goods
 - Relief from duties related to possessions
 - Opportunities for social interaction
 - Environmental benefits
 - Concerns
 - Commercialization of P2P sharing
 - Lack of discriminability from commercial offers

- **Ecological benefits of P2P sharing are obvious to most respondents**
 - Mechanism: more efficient allocation of resources; multiple use of tangibles
 - Impact: reduced need for production, conservation of resources, waste prevention (esp. in mobility and clothing, less so in accommodation)
 - Paradigm: alternative to mass consumption and wastefulness
- **Some interviewees also mention unintended rebound effects**
 - E.g. additional transports, higher wear and tear

- **Most Interviewees expect positive social effects**
 - More social interaction, networks and communities
 - Enhance open-mindedness and tolerance of society in general
- **Users**
 - Intensity of social interaction varies from platform to platform
 - Wimdu, drivy: more formal
 - Kleiderkreisel: long-term, sometimes leading to friendships
 - Possible negative effects: peer pressure
- **Non-Users**
 - No negative effects mentioned
 - Possibility of social inclusion through sharing economy

Motives to engage in P2P sharing



- **The main motive to do P2P sharing is economical**
 - Majority of users report positive economic effects
 - Sharing as source of income or means to save money
- **Critical perspectives**
 - Commercialization of social interactions
 - Job loss in traditional economy
 - Misappropriation of private accommodation

- **Security and privacy concerns are the biggest barriers**
 - Concerns about the reliability and trustworthiness of peers
 - In accommodation: regulatory uncertainty
- **Other barriers**
 - Organizational efforts and costs
 - Lack of demand
 - Lack of availability

CONCLUSIONS

- **People perceive the sharing economy and P2P sharing very positively**
- **Main reason: (P2P) sharing provides triple benefits (people, planet, profit)**
- **Main driver to do P2P sharing is economical; others are pragmatic and social; environmental motives are less important**
- **Future potential of P2P online platforms depends upon ...**
 - ... design of the intermediary service, esp. in terms of risk mgt.
 - ... critical mass / accessibility
 - ... clear regulatory framing



PeerSharing

Thank you very much!

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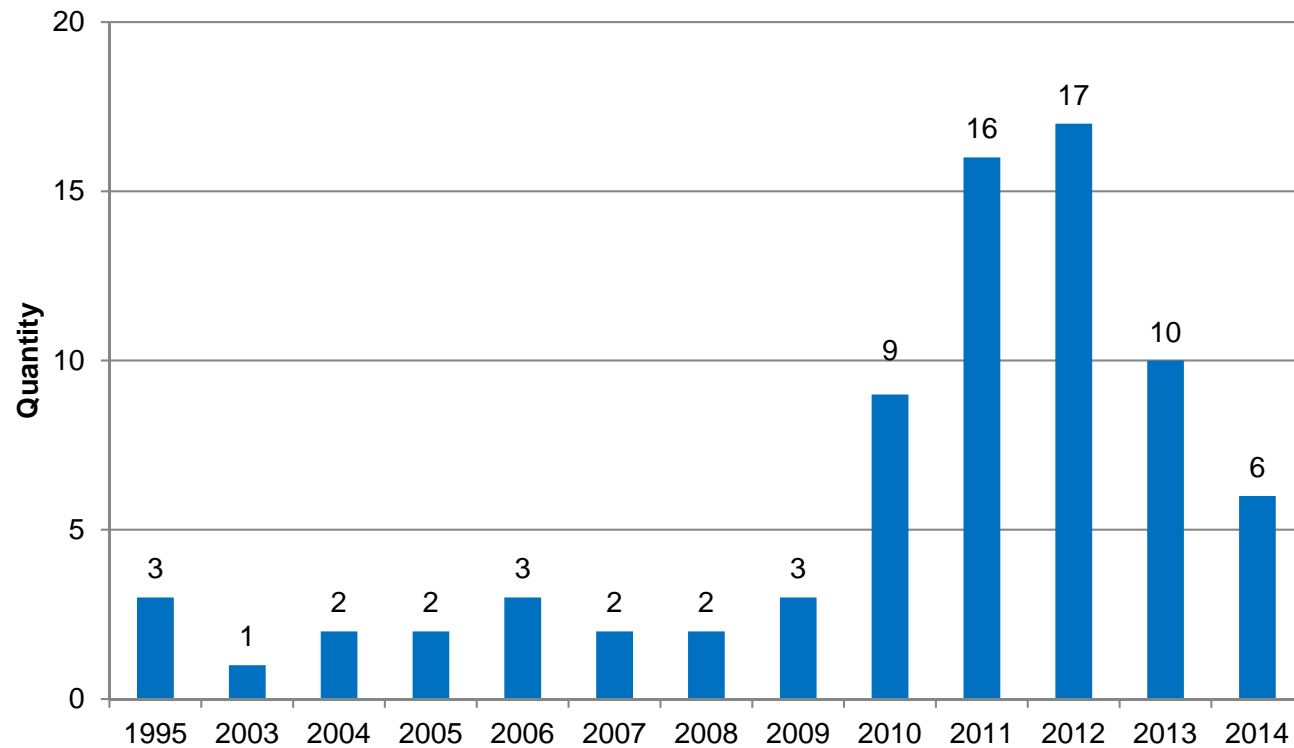
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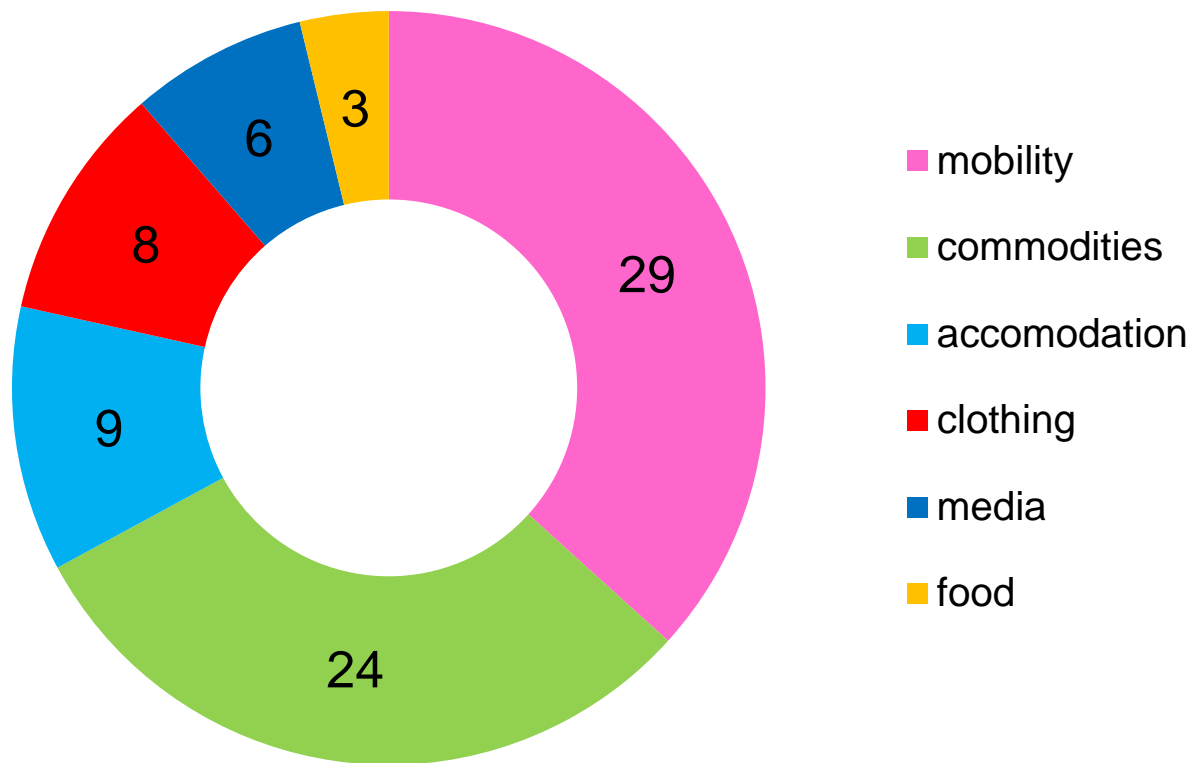
P2P SHARING IN GERMANY

New P2P platforms in Germany



Between 2010 and 2012 the number of online-platforms for peer-to-peer sharing in Germany rises rapidly. Recently, the number declines.

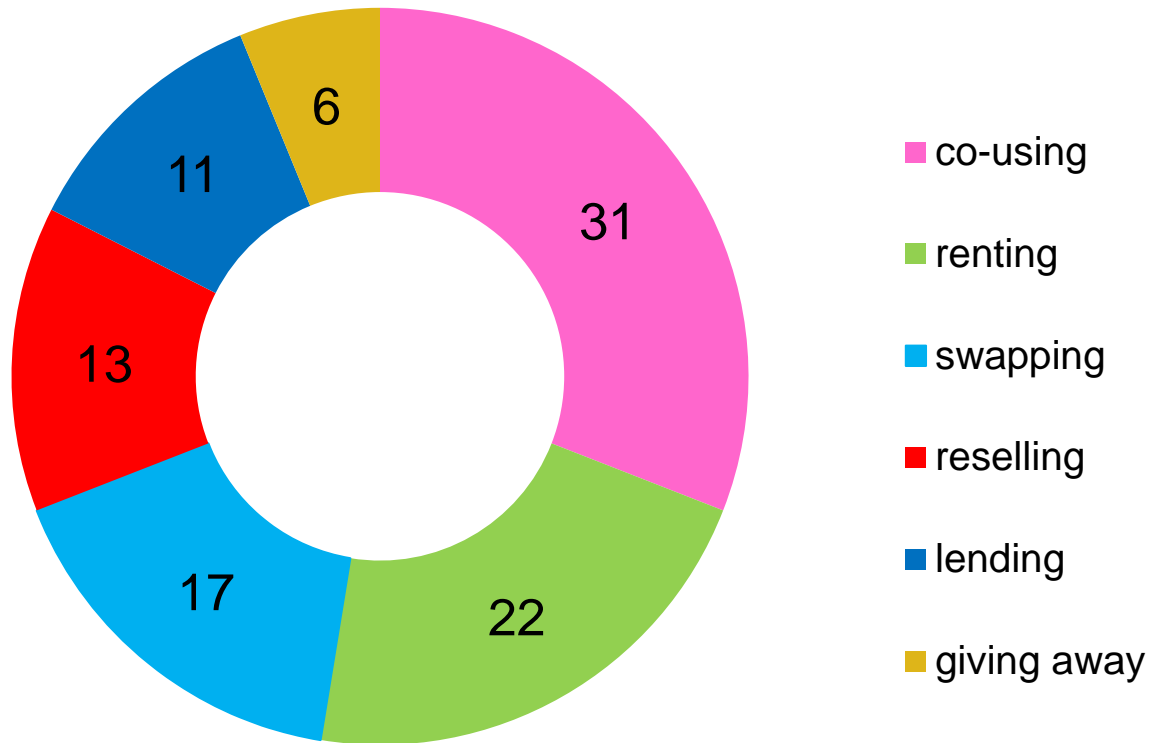
P2P platforms across fields of consumption



N = 79

Online platforms for peer-to-peer sharing exist primarily in the mobility and commodity sector.

Distribution of different sharing practices*



Almost one third of the peer-to-peer sharing platforms in Germany enable simultaneous shared use (co-using). Second ranks the intermediation of renting practices.

* Multiple selections possible