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Empirical analysis of customer motives in the shareconomy: a cross-sectoral comparison

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Abstract

We present the results of an empirical study on German customers' motives to participate in the shareconomy. We focus on four different industries with two companies each: accommodation renting (Airbnb vs. Couchsurfing), car sharing (DriveNow vs. tamyca), commodities (Leihdirwas vs. WHY own it) and clothing (Prêt-à-Louer vs. Kleiderkreisel). We can conclude that the lower prices compared to classical consumption offers provide the main motive for customers using sharing offers. Across industries, we find tremendous differences as regards the importance of further motives like environmental awareness or availability of offers. Based on the results of the study, we elaborate recommendations for the different sectors.

Keywords: Sharing economy; consumer survey; cross-sectoral comparison; Germany
JEL: M31; O35

1 Introduction

The modern phenomenon of the shareconomy is affecting the global economy with increasing scale. Consumers turn into micro entrepreneurs and the classical differences between production, trade, and consumption vanish. Next to the omnipresent concept of car sharing, the economic relevance of sharing accommodations is growing. For instance, the US-owned company Airbnb enables private renting of rooms, flats, as well as luxurious mansions and can therefore be seen as a role model for a successful business based on the principles of the shareconomy. In peek nights, up to 425,000 users worldwide rent accommodations listed on Airbnb (McKinsey&Company, 2014).

It is not only the sharing of cars and accommodations that becomes more and more prominent. An enormous number of online platforms helps customers to exchange commodities like tools, clothes, or digital means of entertainment in an organized way. Since especially for C2C sharing networks, a certain amount of participants is crucial in order to perform, these exchange platforms are in need to attract a high number of users. Hence, it is utterly important for them to address consumers in the right way and convince them of the advantages to participate in the sharing community. These advantages include for example ecological sustainability, fast and ubiquitous access to the products as well as the low price of usage compared to classical consumption. As regards different products, it seems appropriate to highlight different advantages correspondingly. It is thus the main goal of this paper to analyze the importance of different motives in different industries that drive customers to participate in the shareconomy. Using survey data, we identify those aspects that are considered as relevant by consumers.

For all industries, we find that the low price of the sharing offers compared to classical

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consumption offers is the strongest motive for consumers. This result holds independent of sex, age, or income of consumers. Across industries, the importance of the remaining motives differs remarkably. For car sharing services, the good local access is the second most important criterion for consumers. In contrast, for commodities avoiding ownership is highly relevant. The comparison of industries thus yields insights for targeted communication that can help suppliers of sharing offers to improve the placement of their services.

2 Data collection

Within this study, we want to measure which motives lead consumers to use sharing offers instead of classical consumption offers. Therefore, we let consumers evaluate the importance of different criteria in four different industries: accommodation, car sharing, commodities and clothing. These industries are selected with respect to their popularity and their long-term chance of success in the shareconomy (FGM Market Insights, 2014). Furthermore, each industry is represented by two offers, which differ in the organizational form, cost and payment structure and/or transaction form. Thus, a total of eight sharing offers were assessed and analyzed: *Airbnb* and *Couchsurfing* (accommodation renting), *DriveNow* and *tamyca* (car sharing), *Leihdirwas* and *WHY own it* (commodities) as well as *Prêt-à-Louer* and *Kleiderkreisel* (clothing).

Airbnb and Couchsurfing both organize C2C accommodation sharing. While users at Airbnb pay a renting fee per day, private accommodations at Couchsurfing are always offered for free. DriveNow is a professional free-floating car sharing network organized by the two automobile companies BMW and MINI together with the car renting company Sixt. Users have to register and can search locally for cars that can be short-term rented for fixed fees. In contrast tamyca is a platform to organize C2C car sharing with individual tariffs. Both platforms Leihdirwas and WHY own it organize C2C borrowing of commodities like board games or vacuum cleaners. The difference is that borrowing at WHY own it is always free of cost while that at Leihdirwas is costly. Finally, the two companies in the shareconomy of clothing show a greater difference in their sharing concepts. *Prêt-à-Louer* offers short-term borrowing of design fashion for single usage at a fixed price. In contrast, *Kleiderkreisel* is a platform for C2C swapping and trading of clothes of all kind.¹

To identify relevant motives for customers, we reviewed the recent stream of literature dealing with shareconomy (see Table 1). Moreover, we analyzed the public communication of the eight sharing platforms. To date, there is no comprehensive study to evaluate the characteristics of the shareconomy across industries. While some works consider only general motives within the sharing economy (Heinrichs and Grunenberg, 2012), the remaining works focus on specific industries, e.g. car sharing (Gossen, 2012). Further distinctions made in the literature are intrinsic vs. extrinsic motivation (van de Glind, 2013; Hamari, Ukkonen, and Sjöklint, 2013) or emotional vs. rational motives (Böckmann, 2013). In particular, Hamari, Ukkonen, and Sjöklint (2013) analyze the conditions for participating in non-ownership consumption. For our study, we identified a total of ten motives. To use these in our customer survey, we translated them into personal statements (see Table 2).

To obtain an applicable image of the relative importance of the motives, we apply the constant sum technique (Zacharias, 1998). This technique can only be used with a small number of items to be rated (Raab, Unger and Unger, 2009). We thus use a preliminary

¹Table 6 in the appendix summarizes the characteristics of the different sharing offers.

Table 1: Customers' motives found in the literature

	cost reduction	network size and choices	access and availability	social contacts and interaction	sustainability, environment, and saving resources	social responsibility and generosity	diversity and variety	innovation and rarity	usage instead of ownership	fun and self-perception
Scholl and Konrad, 2004	X	X	X				X	X	X	
Lawson, 2010					X	X			X	
Moeller and Witkowski, 2010		X	X					X		
Lawson, 2011	X				X		X		X	X
Salesforce.com, 2011	X			X	X					
Carbonview Research, 2012	X		X	X	X	X			X	X
Gossen, 2012	X	X	X		X		X	X	X	
Heinrichs and Grunenberg, 2012	X		X	X	X	X		X		
Lamberton and Rose, 2012	X	X	X		X	X			X	
Pick, 2012	X		X	X	X					
Tahapary, 2012	X			X	X	X				
Hamari, Ukkonen and Sjöklint, 2013	X				X	X				X
van de Glind, 2013	X		X	X	X	X				X
Zentes, Freer and Beham, 2013	X	X	X	X	X			X	X	
FGM Market Insights, 2014	X		X	X	X					
Owyang, Samuel and Grenville, 2014	X		X	X	X	X		X	X	

survey to reduce the number of motives from ten to five.

The preliminary survey was conducted in September 2014. We presented a neutral description of eight different sharing offers and used our selected companies as representative examples. A total of 15 participants was asked to rate the absolute importance of all ten motives for all eight kinds of sharing offers on a five point scale where 1 represented very low importance and 5 represented very high importance. As a result, we use the following five motives for our main survey: (i) *cost reduction*, (ii) *access and availability*, (iii) *sustainability, environment and saving resources*, (iv) *innovation and rarity*, and (v) *usage instead of ownership*.²

The main survey was conducted online during October 2014. We asked 105 participants to rate the importance of the five motives for each of the eight sharing offers. Accord-

²See Table 7 in the appendix for an overview of the complete results of the preliminary survey.

Table 2: Operationalization of customer motives in personal statements

Motive	Operationalization
Cost reduction	This offer has a good price-performance ratio and helps me to save money.
Network size and choices	This offer gives me a wide choice between different products.
Access and availability	If I need a product, I have access to it everywhere, fast, and easy.
Social contacts and interaction	Due to this offer, I meet new people or I can exchange ideas with like-minded people.
Sustainability, environment, and saving resources	By using this offer, I can help to save resources, live sustainably and do good to the environment.
Social responsibility and generosity	By using this offer, I act socially responsibly as well as ethically correctly and can help others.
Diversity and variety	Due to this offer, I can achieve more diversity and increase my daily variety of products.
Innovation and rarity	Due to this offer, I have access to special products that I would not be able to get otherwise.
Usage instead of ownership	Due to this offer I can try out products and get rid of obligations resulting from property.
Fun and self-perception	Using this offer is fun to me and makes me feel pleased with myself.

ing to the used constant sum technique, participants had to distribute exactly 10 points within one sharing offer to the five motives using integer numbers. Next to the ratings, we tracked the following demographic characteristics for each participant: sex, age, education, monthly net income, and experience with sharing offers.

3 Results

To enhance readability in the rest of this paper, we label our main motives in the following way:

- (i) *Cost*: cost reduction,
- (ii) *Access*: access and availability,
- (iii) *Environment*: sustainability, environment, and saving resources,
- (iv) *Rarity*: innovation and rarity,
- (v) *No ownership*: usage instead of ownership.

Table 3: Average score of the five motives in the main survey

Motive	\emptyset	accommodation	car sharing	commodities	clothing
Cost	3.45	4.51	2.84	3.05	3.39
Rarity	1.80	1.68	1.12	1.95	2.45
Environment	1.70	1.33	2.15	1.48	1.83
Access	1.54	1.49	2.06	1.59	1.02
No ownership	1.52	0.99	1.83	1.93	1.31

Our main result is presented in Table 3, where the average score for the motives is presented. We find that overall, the low price is by far the most relevant driver for people using sharing offers. With an average of 3.45 out of 10 points, Cost is nearly twice as important as the second most important motive Rarity (1.80). This finding is highly significant (pairwise Wilcoxon signed-ranks tests, one-sided, $p < 0.0001$ each). When we look at the remaining motives, we find that Environment (1.70) is more important than Access (1.54). The least important motive is No ownership (1.52). Comparing the scores of the last four motives, we only find two significant differences: Rarity vs. Access (Wilcoxon signed-ranks test, one-sided, $p = 0.0045$) and Rarity vs. No ownership (Wilcoxon signed-ranks test, one-sided, $p = 0.0025$). Our first general result therefore contributes to existing studies reporting that economic and practical reasons seem to incorporate a stronger influence than ecological ones (Böckmann, 2013; FGM Market Insights, 2014).

Result 1. *The main motive for consumers in each of the analyzed shareconomy sectors is the perceived low cost of sharing offers.*

Looking at accommodation renting only, we find that the Cost motive has the highest score among all sharing industries (4.51). This can be explained by the fact that “classical” renting offers provide nearly the same benefits as regards Rarity, Environment, and Access. In line with that, No ownership has not only the lowest score within the accommodation sector but also the lowest score among all industries (0,99). That result is not surprising since buying the accommodation is typically not an alternative in the traditional counterpart of that industry.

In the car sharing industry, things seem to be different. While Cost has the lowest score among all sharing industries (2.84), Environment (2.15) and Access (2.06) hold the highest industry scores. The finding that Environment is so important is in line with consumers’ expectations towards the saving of resources when sharing cars. The valuation of the motive Access is remarkably consistent with the recent development of organized urban car sharing networks. Looking finally at the car sharing scores, Environment, Access, and No ownership (1.83) are significantly more important than Rarity (pairwise Wilcoxon signed-ranks tests, one-sided, $p < 0.0001$ each).

Within the sharing of commodities, No ownership (1.93) has the highest score among all industries. This is not surprising because for usually short-term used commodities like tools, board games, or sports equipment, sharing offers provide a beneficial alternative to classical purchase. Further analyzing the scores, we find that Rarity (1.95) and No ownership are significantly more important than the motives Access (1.59) and Environment (1.48).

When we analyze the scores in the shareconomy of clothes, we find a significant ranking. Rarity (2.45) has the highest score among all industries, which is presumably due to consumers’ preferences for customer-specific dresses and their habits of renewing clothing regularly. The next most important motive in the clothing shareconomy is Environment (1.83) and the least important motive is Access (1.02).

Result 2. *Succeeding the low price, the most relevant motives are diverse across sharing industries. Accommodation reveals no specific motive, Environment and Access are highly relevant for car sharing, Rarity and No ownership are important for commodities, and Rarity is the main motive for Clothing.*

Table 4 shows the average scores for each of the two sharing offers that we selected as representatives for each industry. We find some remarkable differences. Between Couchsurfing and Airbnb, we find a slight difference in the Cost score (Wilcoxon signed-ranks

Table 4: Average score of the five motives for the eight selected sharing offers

Motive	Airbnb	Couchsurfing	DriveNow	tamyca	Leihdirwas	WHY own it	Prêt-à-Louer	Kleiderkreisel
Cost	4.34	4.69	2.59	3.09	2.97	3.12	2.91	3.87
Rarity	1.74	1.61	1.17	1.07	2.10	1.81	2.98	1.92
Environment	1.42	1.24	2.07	2.24	1.36	1.59	1.25	2.41
Access	1.46	1.52	2.49	1.63	1.65	1.53	1.18	0.86
No ownership	1.04	0.94	1.69	1.98	1.92	1.94	1.68	0.94

test, one-sided, $p = 0.056$), which seems to be due to the fact that the accommodation offers at Couchsurfing are free of rent. Comparing DriveNow and tamyca, we find a lower score of Cost (Wilcoxon signed-ranks test, one-sided, $p = 0.001$) combined with a higher score of Access (Wilcoxon signed-ranks test, one-sided, $p < 0.001$) at the former one. This can be related to DriveNow being professionally organized by BMW and Sixt while tamyca being a platform to connect private users only. The two platforms Leihdirwas.de and WHY own it show similar scores. The significant difference between the two Rarity scores (Wilcoxon signed-ranks test, one-sided, $p = 0.003$) might be explained by consumers' expectations to find more exclusive products at the fee-based platform Leihdirwas.de. When we compare the scores of the two clothing offers, we find significant differences (pairwise Wilcoxon signed-ranks test, one-sided, $p < 0.0001$ each). Prêt-à-Louer rent designer fashion and thus consumers value Rarity and No ownership higher. In contrast, kleiderkreisel.de helps consumers to organize private trading and swapping and correspondingly, consumers value Cost and Environment higher.

Result 3. *In each industry, the valuation of certain motives differs between the two analyzed sharing offers. These differences are mainly due to the characteristics and the organizational embodiment of the offered product.*

Table 5: Average score of the five motives for different consumer groups

Motive	experienced	non-experienced	female	male
Cost	3.34	3.69	3.54	3.24
Rarity	1.79	1.82	1.79	1.83
Environment	1.75	1.57	1.79	1.47
Access	1.52	1.58	1.37	1.92
No ownership	1.59	1.34	1.51	1.54

The average scores of the valued motives for distinguished user groups are depicted in Table 5.³ When we compare the scores given by experienced and non-experienced consumers, we find that the non-experienced ones value Cost higher while the experienced ones value No ownership higher. However, only the latter difference is significant (MWU, one-sided, $p = 0.052$).

Female and male consumers reveal some slight differences in scoring their motives to use

³We find no differences in the scores with respect to age, education, or monthly net income.

sharing offers. We can see that females value Cost and Environment higher than males. These differences are not statistically significant. In contrast, male consumers give a significantly higher score to Access (MWU, one-sided, $p = 0.001$).

Result 4. *There are no consumer-specific motives except for experienced consumers valuing No ownership significantly higher and male consumers valuing Access significantly higher.*

4 Discussion

From the results of our survey we have learned that consumers' motives to participate in the shareconomy are different across industries. The only aspect that is relevant independent of product and the organizational form of sharing is the low cost of usage. This is in line with the recent stream of literature and underlines that sharing is from the very bottom an economic phenomenon. Regardless of the sector, companies active in the shareconomy could embrace the aspect of cost saving to address potential consumers. However, price conscience is an ambivalent issue regarding consumers perception of price-focused communication and it can therefore be risky to be the main pillar in a communication strategy. To this effect, but also in order to differentiate between competitors, the next relevant aspects provide an appropriate starting point. As shown in our survey, these should be well chosen because consumers revealed different valuations depending on the product and industry characteristics. In particular, social or ethical aspects of sharing were valued least important and communication strategies that focus hereon might not achieve their proposed goals. While for certain sharing offers addressing these aspects might be promising, we can conclude that for all industries studied in this paper, the communication focus should be different.

For sharing accommodations, no clear recommendation can be inferred from our results. The Cost aspect is so dominant that the main communication should exactly be directed at this advantage. If any, sharing offers could concentrate on a single further motive that distinguishes them from their competitors. The actual communication strategies of Airbnb include highlighting the exclusivity of certain accommodations while those of Couchsurfing underline the opportunity to enter a social community. Therefore these two companies have positioned differently, which is what we would expect.

In the car sharing industry, we have identified two important consumers' motives next to the low price. Saving the environment is relevant to consumers and thus companies can use this aspect to convince new customers to use their service. This seems to be quite necessary since main competitors like bus or train services constantly claim to be more environmentally friendly. Next to this aspect, a good and easy access to cars is important to potential users of car sharing services. With an increasing network and mobile applications, both DriveNow and tamyca for example address these customer needs in the right way. Interestingly, DriveNow is also promoting their fleet consisting of exclusive brands, models, and equipment. According to our results, consumers seem not to be attracted much by that as shown by the low score for the Rarity motive.

Two aspects that we identified as important for consumers sharing commodities instead of purchasing them are the access to special products and avoiding ownership. Both selected platforms Leihdirwas and WHY own it already use these two aspects in their communication. As regards the widened access to commodities, we can think of expensive goods like sports equipment on the one hand and rarely used goods like a drill on the other hand. A sharing offer's communication should be chosen depending on the kind of good that is

provided. For the rarely used commodities, it seems appropriate to highlight the No ownership aspect of sharing. Additionally, it must be clear that also the lending participants in the shareconomy need to be attracted. In this respect, WHY own it addresses them in a good catchy way already through its name.

Companies operating in the industry of sharing clothing can focus on the following two aspects: access to special dresses and protecting the environment. Looking at the two businesses we studied, we find one example for each of these aspects. Prêt-à-Louer is centering its service around the lending of designer fashion. Comparable to expensive commodities, it is more attractive for consumers to lend rather than purchase that kind of fashion. At Kleiderkreisel, consumers do not only find a wide variety of products, but can also save resources by swapping clothes. It seems that the motive of environmental sustainability is still a strong one in companies' communication that helps to convince consumers to participate in sharing clothes.

While our survey results shed some light on consumers' motives in four branches in Germany, some open questions remain. Continued research should address additional services or goods within sharing markets like food, bikes, or household chores. Moreover, the comparison of consumers' motives in different industries in different countries might yield further insights, which can help companies in the shareconomy to improve their communication strategies.

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A Platform characteristics

Table 6: Overview about the characteristics of the eight sharing offers

	who2whom	type of sharing	fees	access via
DriveNow (BMW/Sixt)	B2C	renting short-term	usage fee (pay per use in time) optional insurance fee no general fee for platform use	mobile application
Tamyca	P2P	renting short-term	usage fee according to agreement between users	website
Airbnb	P2P	renting mostly short-term	individual usage fee commission fee to platform no general fee for platform use	website (and mobile application)
Couchsurfing	P2P	renting mostly short-term	accommodation is mainly shared or provided for free no usage or commission fee no general fee for platform use	website
Leihdirwas	P2P	renting short-term	usage fee according to agreement between users commission fee for platform no general fee for platform use insurance provided	via website
WHY own it	P2P	lending short-term	no general fee for platform use	mobile application
Prêt-à-Louer	B2C	renting short-term	varying usage fee per rent no general fee for platform use	website
Kleiderkreisel	P2P	selling swapping or giving as a gift	determined by user no general fee for platform use commission fee via mandatory payment system	website and mobile application

B Preliminary survey

Table 7 summarizes the results of the preliminary survey.⁴

Table 7: Average score of the chosen motives in the preliminary survey

Motives	accommodation	car sharing	commodities	clothing	$\bar{\emptyset}$
Cost	4.43	4.07	4.33	4.27	4.28
Choice	3.40	2.60	3.83	3.67	3.40
Access	3.27	3.90	3.53	3.20	3.48
Social	3.13	1.63	2.43	2.07	2.32
Environment	2.97	4.07	3.83	3.57	3.61
Ethical	2.73	3.13	3.07	3.07	3.00
Diversity	3.07	2.77	3.23	3.80	3.22
Rarity	3.80	2.97	3.83	3.87	3.62
No ownership	2.50	4.20	3.83	3.30	3.46
Fun	3.40	2.97	3.07	3.20	3.16

C Original language

The following German sentences were originally used to represent the motives of interest in the preliminary survey and in the main survey accordingly:

Cost reduction: “Das Angebot bietet ein gutes Preis-Leistungs-Verhältnis und hilft mir dabei Geld zu sparen.”

Network size and choices: “Das Angebot ermöglicht mir eine groe Auswahl zwischen verschiedenen Produkten.”

Access and availability: “Wenn ich ein Produkt brauche, habe ich überall, schnell und einfach Zugriff darauf.”

Social contacts and interaction: “Durch das Angebot lerne ich neue Menschen kennen oder kann mich mit Gleichgesinnten austauschen.”

Sustainability, environment, and saving resources: “Mit der Nutzung des Angebotes kann ich dabei helfen, Ressourcen zu schonen, nachhaltig zu leben und der Umwelt etwas Gutes tun.”

Social responsibility and generosity: “Mit der Nutzung des Angebotes handle ich sozial verantwortlich und moralisch korrekt und kann anderen helfen.”

Diversity and variety: “Durch das Angebot kann ich für mehr Abwechslung sorgen und meine tägliche Produktauswahl erweitern.”

Innovation and rarity: “Durch das Angebot habe ich Zugang zu besonderen Produkten, die ich sonst nicht bekommen könnte.”

Usage instead of ownership: “Durch das Angebot kann ich Produkte ausprobieren und mich von den Pflichten durch Eigentum befreien.”

Fun and self-perception: “Die Nutzung des Angebotes macht mir Spaß und macht, dass ich mit mir zufrieden sein kann.”

⁴The abbreviated motives stand for: *Cost*: cost reduction, *Choice*: network size and choices, *Access*: access and availability, *Social*: social contacts and interaction, *Environment*: sustainability, environment, and saving resources, *Ethical*: social responsibility and generosity, *Diversity*: diversity and variety, *Rarity*: innovation and rarity, *No ownership*: usage instead of ownership, *Fun*: fun and self-perception.

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