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Shared, Collaborative and On Demand: The New Digital Economy

The sharing economy and on-demand services are weaving their way into the lives of (some) Americans, raising difficult issues around jobs, regulation and the potential emergence of a new digital divide

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Shared, Collaborative and On Demand: The New Digital Economy

The sharing economy and on-demand services are weaving their way into the lives of (some) Americans, raising difficult issues around jobs, regulation and the potential emergence of a new digital divide

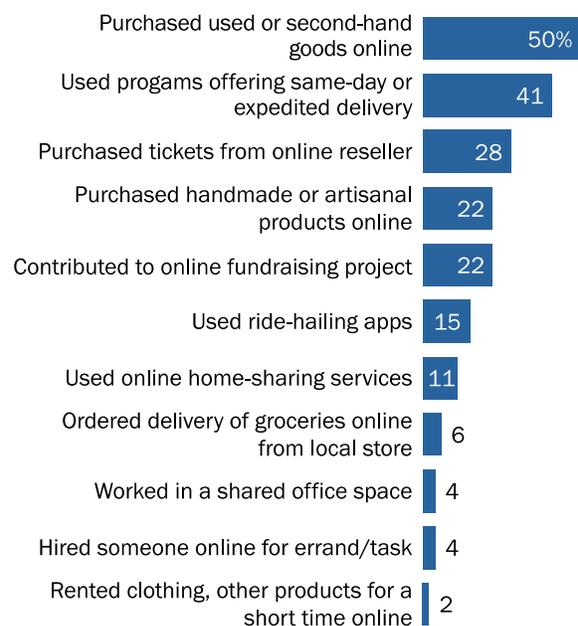
A number of new commercial online services have emerged in recent years, each promising to reshape some aspect of the way Americans go about their lives. Some of these services offer *on-demand* access to goods or services with the click of a mouse or swipe of a smartphone app. Others promote the commercialized *sharing* of products or expertise, while still others seek to connect communities of interest and solve problems using open, *collaborative* platforms. These services have sparked a wide-ranging cultural and political debate on issues such as how they should be regulated, their impact on the changing nature of jobs and their overall influence on users' day-to-day lives.

A national Pew Research Center survey of 4,787 American adults – its first-ever comprehensive study of the scope and impact of the shared, collaborative and on-demand economy – finds that usage of these platforms varies widely across the population. In total, 72% of American adults have used at least one of 11 different shared and on-demand services. And some incorporate a relatively wide variety of these services into their daily lives: Around one-in-five Americans have used four or more of these services, and 7% have used six or more.

At the same time, around one-quarter of Americans (28%) say they have not used *any* major shared or on-demand platforms, and

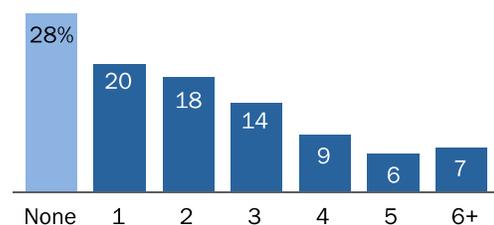
72% of Americans have used some type of shared or on-demand online service

% of adults who have ...



But exposure to these services varies widely

% of adults who have used ... of these services



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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many are wholly unfamiliar with the tools and vocabulary of the new digital economy. For instance, 15% of Americans have used ride-hailing apps like Uber or Lyft, but twice as many have never heard of these apps before. Similarly, 11% of Americans have used home-sharing platforms like Airbnb or VRBO, but roughly half have never heard of home-sharing sites. In addition:

- 61% of Americans have never heard of the term “crowdfunding.”
- 73% are not familiar with the term “sharing economy.”
- 89% are not familiar with the term “gig economy.”

Each of these individual platforms has its own unique user base. Still, exposure to these shared, collaborative and on-demand services at a broad level is heavily concentrated among certain demographic cohorts. In particular:

College graduates – 39% of college graduates have used four or more of these services, compared with just 8% of those with a high school degree or less. At the same time, around one-quarter of college graduates have used none (11%) or only one (15%) of these services.

Those with relatively high household incomes – 41% of Americans with an annual household income of \$100,000 or more have used four or more of these services, three times the proportion among households earning less than \$30,000 annually.

Those under the age of 45 – Exposure to these shared and on-demand services begins to drop off rapidly starting at around age 45. Around one-third of those ages 18-44 have used four or more of these services, and relatively few in this age range have no exposure at all to these services. By contrast, 44% of Americans ages 50 and older (and 56% of those ages 65 and older) have not used any of these 11 platforms.

A number of these services – though by no means all of them – are offered primarily in and around urban population centers. And urban and suburban residents are around twice as likely as those living in rural areas to use four or more of these services. At the same time, around one-quarter of urban and suburban dwellers have not used any of the platforms measured in this survey.

Many are unfamiliar with the vocabulary of the new digital economy

% of adults who have heard of the following terms

39% “Crowdfunding”

27% “Sharing economy”

11% “Gig economy”

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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This report offers a detailed examination of three different services that exemplify the shared, collaborative and on-demand economy: ride-hailing apps, home-sharing platforms and crowdfunding services. Key findings about each of these three services are discussed in more detail below.

Ride-hailing apps (used by 15% of American adults)

More so than many of the services examined in this survey, ride-hailing apps appeal heavily to younger adults. The median age of adult ride-hailing users in the United States is 33, and 18- to 29-year-olds are seven times as likely to use these services as are those age 65 and older (28% vs. 4%). Ride-hailing use is also heavily concentrated among urban residents (especially younger urbanites and those with relatively high levels of income and educational attainment), while being consistently low among rural residents of all kinds.¹

Ride-hailing users' attitudes toward these services are strongly positive; users are in near-universal agreement that ride-hailing saves them time and stress, and that these services offer good jobs for people who prioritize flexible working hours

When presented with a number of attributes that might describe ride-hailing apps, users respond especially strongly to two in particular: 86% of ride-hailing users feel that these services save their users time and stress, while 80% feel that they offer good jobs for those who want flexible working hours. Users also broadly agree that these services could be a good transportation option for older adults with limited mobility, and that they are less expensive than traditional taxi services.

Ride-hailing users are more divided on questions such as whether or not these services simply help serve people who already have plenty of transit options available to them, and whether they are a good way to transport unaccompanied minors. But relatively few (11%) think that these services collect too much personal information about their users. And a sizable majority of users feel that these services use drivers that they feel safe riding with (70% feel that this describes these services well, while just 5% disagree).

Frequent ride-hailing users are less likely than other Americans to own a car – but also rely heavily on a range of other transit options

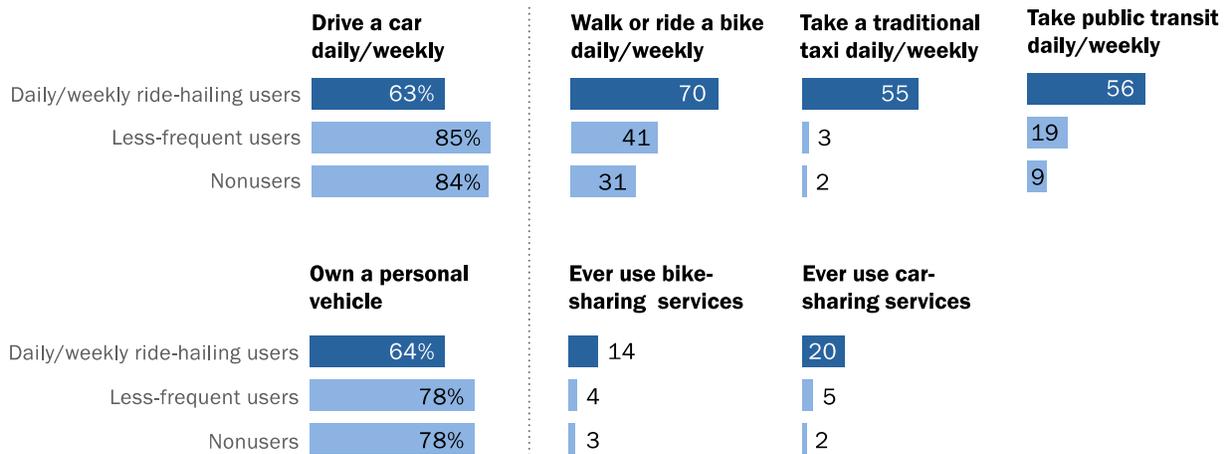
Some 3% of American adults use ride-hailing apps on a daily or weekly basis, and around two-thirds of these regular ride-hailing users indicate that they own a car or regularly drive a personal vehicle. Although this means that a majority of these regular ride-hailing users are car owners/drivers, they are significantly less likely to own or drive a car than either occasional ride-hailing users or Americans who do not use ride-hailing at all.

¹ To a greater extent than many of the services discussed in this report, ride-hailing apps are primarily available in and around metro areas.

Yet although they are less dependent on personal vehicle ownership, these regular ride-hailing users rely heavily on a wide range of personal transportation options that go well beyond ride-hailing alone – such as taking public transit, walking or riding a bike, or even using traditional taxi services. To be sure, this trend carries a strong geographic component: For Americans who live far from urban centers, a personal vehicle might be the only available option to get from one place to another. But for those with the option of doing so, ride-hailing apps can serve as one element among many in a network of transportation options that can help reduce users’ reliance on personal vehicle ownership.

Frequent ride-hailing users less likely to own or drive a car, more likely to use a range of other transit options

% in each group who ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Ride-hailing users are closely following the debate over the best way to regulate ride-hailing apps – and are extremely reluctant to apply legacy taxi regulations to these new services

Just 15% of Americans have used ride-hailing apps themselves, but nearly half of all adults (48%) have heard at least something about the debate happening in cities across the country over how best to regulate these services. Ride-hailing users themselves are following this issue especially closely: Fully 85% of ride-hailing users have heard at least something about this debate, and 39% indicate that they have heard “a lot” about it.

When it comes to their views on how to best regulate these services, the public at large is relatively split. Among Americans who have heard of this issue, 42% feel that these services should *not* be required to follow the same rules and regulations as existing taxi companies when it comes to things like pricing, insurance or disability access; 35% think that they *should* have to follow these rules, while the remaining 23% are not sure how they feel.

But although the engaged segment of the general public is relatively divided, ride-hailing users themselves tend to favor the notion (by a two-to-one ratio) that these services should *not* have to follow the same rules and regulations as legacy taxi operators. Among ride-hailing users who have heard of this debate, 57% believe that these services should not be required to follow the existing regulations that are in place for incumbent providers, while just 27% believe that existing rules and regulations should in fact apply to these new market entrants.

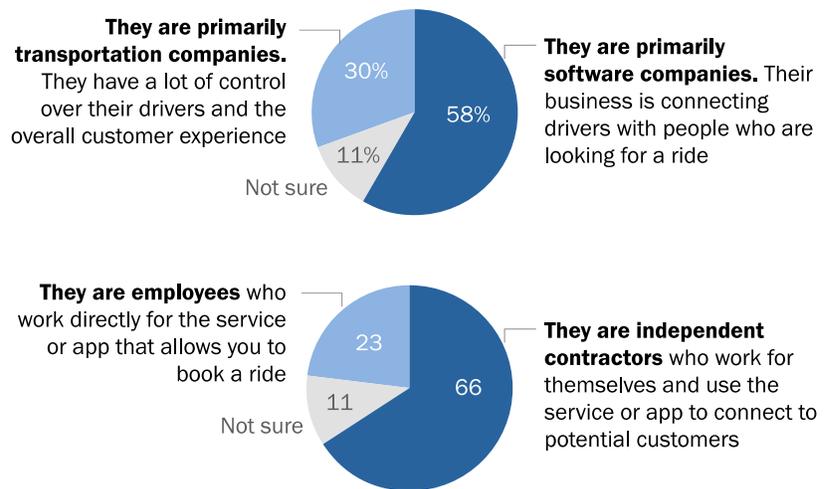
Are they contractors or employees? Employers or platforms? Users have varying views about the relationship between ride-hailing apps and ride-hailing drivers

Ride-hailing apps are one of the leading examples of the so-called gig economy, but many users are not entirely clear about the nature of the relationship between these services and the drivers who use them. In the abstract, users tend to view these services as software platforms rather than transportation companies, and they view their drivers as independent contractors rather than employees. Some 58% of ride-hailing users view these apps as *software companies* that simply connect drivers with people who are looking for a ride, while 30% view them as *transportation companies* that have a great deal of control over their drivers and the overall customer experience. Similarly, 66% of ride-hailing users think of the drivers who work for these services as *independent contractors*, while 23% view them as *employees* of the app or service.

At the same time, ride-hailing users place varying degrees of responsibility on drivers and the services themselves when it comes to managing various aspects of the day-to-day customer experience:

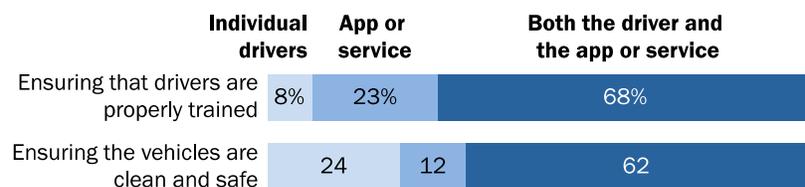
Americans who use ride-hailing services tend to view them as software platforms that connect independent drivers with people seeking a ride ...

% of ride-hailing users who describe these services and the drivers who use them as follows:



... But expect these services to play a role in managing the customer experience

% of ride-hailing users who think ... is/are responsible for ensuring the following aspects of service are achieved



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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- 68% of ride-hailing users believe that both drivers and the services themselves should be responsible for making sure that drivers are properly trained. One-quarter (23%) believe this is the sole responsibility of the services, while 8% think it is the responsibility of each individual driver.
- 62% of users believe that both drivers and services should be responsible for making sure that the vehicles that customers request are clean and safe. Some 12% think this is the responsibility of the services alone, while 24% think it is up to individual drivers to ensure this.

Ride-hailing apps are discussed in detail in [Chapter 2](#) of this report.

Home-sharing platforms (used by 11% of adults)

Around one-in-ten Americans have used a home-sharing site such as Airbnb or HomeAway to stay in someone's home for a period of time – and these services appeal to a relatively broad age spectrum in comparison with ride-hailing apps. Americans ages 35-44 are nearly twice as likely as those ages 18-24 to have used home-sharing services (16% vs. 9%), and the median age of home-sharing users in the United States is 42 – nearly a decade older than the median ride-hailing user.

Users view these services as a good option for groups traveling together and a good way for homeowners to make extra income; at the same time, many users view these services as best for adventurous travelers, and around one-in-five think of them as risky to use

When presented with several attributes that might define home-sharing services, users respond especially strongly to the notion that these services are a good option for families or people who travel as a group (87% of users feel that this describes home-sharing sites well), and that they are a good way for homeowners to earn extra money (85%). At the same time, many users of these sites view home-sharing as something that is perhaps not for everyone. Roughly half of users (53%) say these services are best-suited for adventurous travelers; 42% say the properties on these sites are not always as appealing as they seem online; and around one-in-five (18%) say they are generally risky to use.

37% of home-sharing users have used these services to stay in a shared space in someone's home

Some 37% of home-sharing users report that they have used these services to reserve a single room or other type of shared space in someone's home (this works out to 4% of all American adults). However, many of these users express some level of reservation about doing so. Some 48% of those who have stayed in this type of shared lodging say they worry about staying with someone they have never met before, and 66% of these users feel that home-sharing services are best for adventurous travelers. In addition, these users are twice as likely to have had a bad experience using home-sharing compared with other users.

As was true of ride-hailing, the structure of home-sharing services is difficult for many users to place into the context of the traditional hospitality industry

Much like ride-hailing apps in the context of the employer/worker relationship, home-sharing services are structured much differently from traditional hotels – and consumers are not always clear on the precise nature of this new arrangement. Some 58% of home-sharing users indicate that they see these services as *software companies* whose business is simply connecting people with a spare room or empty house with others who are looking for a place to stay. At the same time, 26% view them as *hospitality companies* that vouch for the quality of the properties they list and have a good deal of control over the customer experience.

And as was also true in the case of ride-hailing, home-sharing users place varying levels of responsibility on homeowners and the services themselves when it comes to managing specific aspects of the day-to-day user experience:

- 67% of home-sharing users believe that *both* individual homeowners and the services themselves should be responsible for making sure that properties are described accurately. Some 8% think it is the sole responsibility of the app or service that people use to book their stay, while one-quarter (23%) believe it is the sole responsibility of individual homeowners.
- 57% of users believe that both homeowners and services should be responsible for resolving payment issues between hosts and guests. Some 31% think this is the responsibility of the services alone, while 11% think it is the responsibility of individual homeowners.
- 53% of users believe that both homeowners and services should be responsible for addressing problems that might come up during someone's stay. One-in-ten (10%) believe that this is the sole responsibility of the app or service, while 35% believe it is the responsibility of the homeowner alone.

Most home-sharing users are not following the debate over the legal and regulatory status of these services particularly closely; those who are following this issue tend to feel that these services should be legal, and that owners should not have to pay hotel or lodging taxes

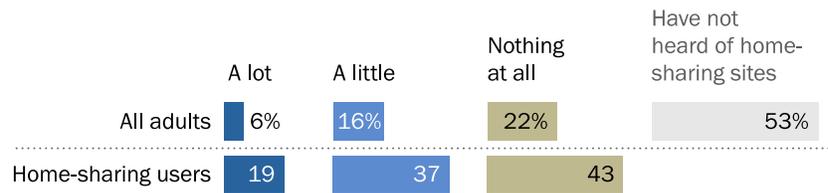
Much like ride-hailing apps, the legal and regulatory status of home-sharing services has been the subject of much debate in cities around the country. But in contrast to ride-hailing, relatively few Americans have been following the debate over home-sharing services: 22% of Americans have heard something about this issue, with just 6% indicating that they have heard “a lot” about it. Even users of home-sharing services themselves are not following this issue particularly closely: Just 19% of home-sharing users have heard “a lot” about it, while 37% have heard “a little.”

But although home-sharing users have not been following the legal debate over these services with nearly the same intensity as their ride-hailing counterparts, those home-sharing users who have been following this issue tend to feel that these services should be both legal and tax-free for owners. Among home-sharing users who are aware of the legal debate over these services, 56% believe that these services *should* be legal, and that owners *should not* have to pay any local hotel or lodging taxes; just 31% believe that owners should be able to legally rent out these services but should have to pay taxes for the privilege of doing so.

Home-sharing sites are discussed in more detail in [Chapter 3](#).

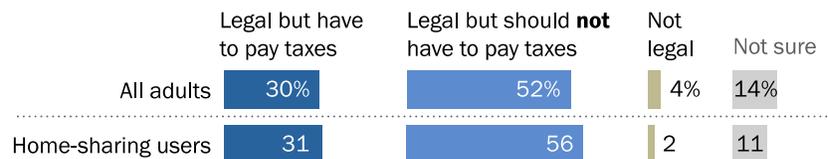
One-in-five Americans have heard of the debate over the legality of home-sharing services

% in each group who have heard ... about the debate over whether or not homeowners should be able to legally rent out their homes using services like Airbnb, VRBO or HomeAway



And both users and nonusers strongly support the legality of these services; they also feel (if less strongly) that homeowners using these services should not have to pay taxes in order to use them

Among those who have heard about this debate, percent who say these services should be ...



Source: Survey conducted Nov. 24-Dec. 21, 2015. “Shared, Collaborative and On Demand: The New Digital Economy”

Crowdfunding sites (used by 22% of adults)

Around one-in-five American adults have contributed to an online fundraising project on a site like Kickstarter or GoFundMe, and 3% of Americans have created their own fundraising project on one of these sites.

Most crowdfunding donors have made relatively modest contributions to a handful of projects

The overwhelming majority of crowdfunding users have contributed to a handful of projects: Some 87% of donors say they have contributed to a total of five projects or fewer on these sites. And while 62% of donors have given \$50 at most to an individual project, relatively large donations are not uncommon: 21% of these donors have given between \$51 and \$100 to an individual project, 14% have given between \$101 and \$500, and 3% have donated more than \$500 at one time.

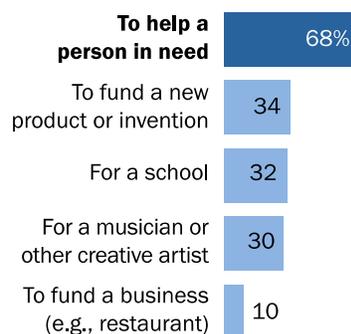
Contributions to help an individual in need – often a friend or family member – are the most common type of crowdfunding donation

Users frequently contribute to crowdfunding projects as a way to help individuals in need. Fully 68% of crowdfunding donors have contributed to a project to help someone facing some sort of hardship or financial challenge, making it the most common type of project of the five evaluated in this survey. In addition to these types of projects:

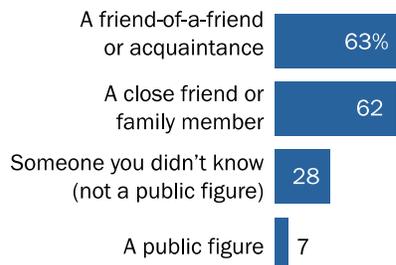
- 34% of crowdfunding donors have contributed to a project to fund a new product or invention.
- 32% have contributed to a project for a school.
- 30% to a project for a musician or other creative artist.
- 10% to a project for a new restaurant or other type of business.

Projects to help a person in need – often a friend or family member – are the most popular use of crowdfunding platforms

% of U.S. crowdfunding donors who have contributed to a project ...



Among the 68% of donors who have contributed to a project to help a person in need, the % who donated to ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Contributions to help someone in need are more often directed toward a person who is already known by the donor, as opposed to a stranger or a public figure. Among those who have contributed to a crowdsourced project to help someone in need, 63% say they have given to help a friend of a friend or an acquaintance, while 62% have contributed to help a close friend or member of their family. By contrast, just 7% of these donors have given to a campaign to assist a public figure, while 28% have given to help someone who was not a public figure but whom they did not know personally.

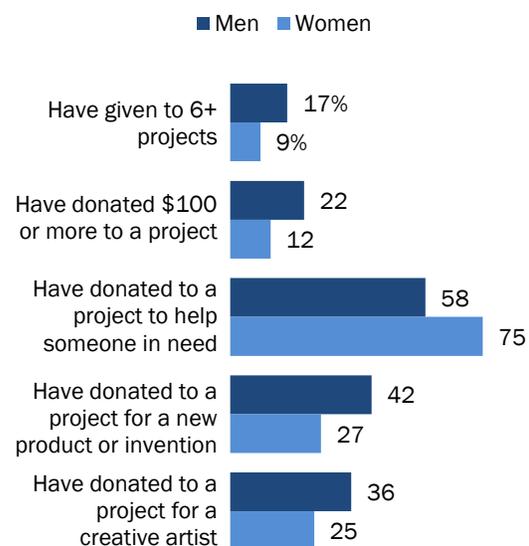
Men and women take a different approach to crowdfunding: Women are more likely to contribute to help someone in need, while men are more likely to fund new products or inventions

Men and women differ in a number of ways when it comes to their use of crowdfunding platforms. Male donors are roughly twice as likely as female donors to have contributed to six or more projects, and are also nearly twice as likely to have contributed more than \$100 to an individual project. And while women are more likely to contribute to a project to help someone in need, men are more likely to help fund new products or inventions, as well as projects for musicians or other creative artists. Younger men are especially interested in funding new products and inventions: 48% of men ages 18-49 who have made a crowdfunding donation have contributed to this type of project.

Crowdfunding sites are discussed in more detail in [Chapter 4](#).

Male and female crowdfunding donors give differently and to different projects

% of male/female crowdfunding donors in U.S. who ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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Other notable findings

- Men and women are equally likely to use most shared and on-demand platforms, but women are twice as likely as men to buy handmade or artisanal goods online: 29% of women have done this, compared with 15% of men.
- A cohort of young adults uses ride-hailing apps with great intensity: 7% of *all* 18- to 29-year-olds (and 10% of 18- to 29-year-olds living in urban areas) indicate that they use ride-hailing on a daily or weekly basis.
- 27% of Americans are aware of ride-hailing apps and indicate that they live in an area where these services are offered, but have not yet tried ride-hailing themselves.
- Users' views on how best to regulate ride-hailing and home-sharing services stand in contrast to their overall political leanings. Even users of these services who are politically liberal tend to support the notion that they should be legal and tax-free (in the case of home-sharing), or that they should be free to operate outside of existing regulatory structures (in the case of ride-hailing).
- Men and women tend to perceive and experience these services somewhat differently when it comes to the issue of user safety – though these differences are not always dramatic or consistent. For instance, women are more likely than men to express safety concerns about the drivers used by ride-hailing services, and women are also more likely to report having a bad experience using a home-sharing site. At the same time, a substantial majority of female ride-hailing users indicate that these services do indeed use drivers that they feel safe riding with. And female home-sharing users are no more likely than men to view these services as risky to use.
- 2% of Americans have contributed to an online fundraising project to help someone in need primarily because they felt socially obligated to do so.
- 6% of women ages 18-49 have started their own online fundraising project, double the figure for the population as a whole.

1. Introduction

In recent years a number of online services have emerged that promise to reshape the way that Americans shop, eat, earn a living, go on vacation, get from place to place, and share goods, services and money with each other. [Commercial juggernauts](#) like the ride-hailing app Uber or the home-sharing platform Airbnb represent some of the most well-known examples of these new services, but they encompass the [host of services, apps and online platforms](#) of various sizes that are generally considered to be part of the shared, on-demand and collaborative economy. These new platforms serve a wide range of markets and objectives, but several characteristics help to define the landscape of this corner of the digital economy. (Note: The list of specific platforms that Pew Research Center measured in this survey is not exhaustive. Moreover, not all of the services discussed in this report possess all of the attributes discussed below.)

One characteristic of these services is that many maintain little (if any) inventory themselves. Instead, they often function as a platform for connecting excess goods or capacity – an old piece of furniture, space in the passenger seat of someone’s car, a room in someone’s home, a parking space, a designer dress or workers’ time and skills – with people who want to purchase or simply use those items or services for themselves.

These services also tend to rely on flexible forms of employment as a key element of their business model. Just as many of these services tend to maintain little in the way of real-world inventory, most directly employ a relatively small number of workers. Typically the people who actually interact with customers and other end users are so-called 1099 workers (a reference to the tax form that independent contractors receive each year) who are not employed by the service itself. This arrangement allows these workers to offer services on a flexible or part-time basis – but also means that they do not qualify for many of the government-mandated benefits available to traditional employees under law, such as employer-subsidized health insurance or the ability to get reimbursed for business expenses.

Finally, these services are often premised on removing the friction, hassle and inconvenience from users’ everyday lives – for a price. For services that offer physical products, this might mean offering same-day delivery of a variety of household items so that users are saved a trip to the grocery store after a long day at the office. For more task-oriented services, this might mean offering users the ability to instantly summon a driver or personal chef at a moment’s notice from a smartphone app.

As is the case with many of the services themselves, the way these services function is not necessarily new. People have been selling used or handmade items on peer-to-peer commerce

platforms like eBay and Craigslist since the early days of the modern web; Amazon introduced its Prime expedited-shipping membership service in 2005; and the dot-com bubble of the late 1990s prominently featured a number of on-demand delivery services, ranging from the famously short-lived Kozmo.com (which promised to deliver a variety of products to customers within one hour with no delivery charge) to the still-operational grocery delivery service Peapod.

But while these new shared and on-demand services are in some respects little different from others that came before them, they have presented a number of challenges to regulatory and policy structures that in many cases predate the internet era by decades. For instance, cities around the country have struggled with how to incorporate ride-hailing apps and home-sharing platforms into existing regulatory structures governing the for-hire vehicle and hotel markets. And the piecemeal, episodic nature of employment in the emerging “gig economy” has placed new challenges on workforce regulations and social safety net programs that were designed for an era when the distinction between workers and contractors was more clear-cut.

These services have also touched off a wide-ranging debate about their impact on the economy and on society as a whole. Many laud these services for the convenience and efficiency they bring into users’ day-to-day lives. But others worry about the [vast quantities of cardboard](#) and other waste that are the byproduct of this convenience, or express concern that these services are simply [helping the already-fortunate](#) to lead more comfortable lives – with little long-term benefit to the broader population who cannot afford to use these services, or to the workers who ultimately make them possible.

This report examines Americans’ use of – and attitudes toward – the shared, collaborative and on-demand digital economy. The following three chapters offer an in-depth examination of three archetypal examples of the most recent wave of digital innovation. [Chapter 2](#) examines the nature and impact of on-demand services in the context of ride-hailing apps. [Chapter 3](#) uses the example of home-sharing services to examine issues related to the sharing economy more broadly. And [Chapter 4](#) uses a series of questions about crowdfunding platforms to examine the scope and impact of collaborative platforms. Finally, [Chapter 5](#) discusses usage data for a number of other digital economy services.

2. On-demand: Ride-hailing apps

For supporters and detractors alike, few services exemplify the modern “on-demand” economy more than ride-hailing apps. Unlike traditional taxi cabs that require customers to hail a car on the street or call into a central dispatch, these apps allow users to request a ride using their smartphone, track the progress of their driver in real-time, and offer an integrated payment and ratings system. The drivers for these services are frequently part-time or “gig” workers who use their own vehicle and combine their ride-hailing work with other sources of income. For instance, a [2015 survey](#) of Uber drivers found that around six-in-ten drivers work another job in addition to driving for Uber. Indeed, the phrase “[Uber for \[X\]](#)” (along with Lyft, its main competitor, Uber is the largest and most well-known of these services) has become technology industry shorthand for a range of services that let users connect in real time with people who are willing to be hired to do various tasks – such as doing laundry, buying and delivering groceries or cooking dinner. The following chapter of this report examines the broader contours of the on-demand economy through the prism of these ride-hailing apps.

15% of American adults have used ride-hailing apps, but one-third have never heard of these services

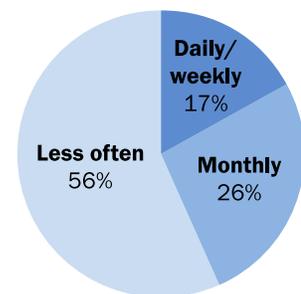
Despite their cultural prominence in media and technology circles, just 15% of American adults indicate that they have ever used a ride-hailing service such as Uber or Lyft. Half of all Americans (51%) are familiar with these services but have not actually used them, while one-third (33%) have never heard of these services before. Notably, the availability of these services is geographically constrained in a way that many of the services discussed in this report are not. With some exceptions, they are largely only available in and around urban areas.²

15% of American adults have used ride-hailing apps

*% of adults who ...
ride-hailing apps*



*Among those who use
ride-hailing, % who
use them ...*



Source: Survey conducted Nov. 24-Dec. 21, 2015.
“Shared, Collaborative and On Demand: The New Digital Economy”

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² For instance, see <https://www.uber.com/cities/> and <https://www.lyft.com/cities>

For most users, ride-hailing is a relatively sporadic activity: 26% of ride-hailing users indicate that they utilize these services on a monthly basis, and an additional 56% use them less often than that. However, close to one-in-five users utilize ride-hailing much more frequently: 3% indicate that they use these services on a daily or near-daily basis, while 14% indicate that they use them weekly. Put differently, 3% of *all* American adults use ride-hailing services on a regular (i.e. daily or weekly) basis, while 12% use these services once a month or less often.

As is the case with many new technologies, ride-hailing usage varies significantly by age. Roughly one-quarter of 18- to 29-year-olds (28%) and one-in-five 30- to 49-year-olds (19%) have used ride-hailing, but just 4% of Americans 65 and older have done so. Indeed, the median age of adult ride-hailing users in the United States is just 33.

In addition to having high rates of usage in general, young adults also are especially likely to use these services frequently. Some 7% of *all* 18- to 29-year olds (and 10% of 18- to 29-year-olds living in urban areas) use ride-hailing on a daily or weekly basis. Just 3% of 30- to 49-year-olds, and fewer than 1% of Americans age 50 and older, use ride-hailing with this degree of frequency.

Along with young adults, ride-hailing usage (as well as awareness) is particularly high among college graduates and the relatively affluent:

- 29% of college graduates have used ride-hailing services and just 13% are unfamiliar with the term. Among those who have not attended college, just 6% have used these services and half (51%) have never heard of them before.
- 26% of Americans with an annual household income of \$75,000 or more have used these services, while just 14% have never heard of them. For those living in households with an annual income of less than \$30,000, just 10% have used these services and 49% are not familiar with them at all.

Ride-hailing popular among young adults, urbanites, college grads

% who have used a ride-hailing service like Uber or Lyft

All U.S. adults	15%
Men	16
Women	14
White	14
Black	15
Latino	18
18-29	28
30-49	19
50-64	8
65+	4
HS grad or less	6
Some college	15
College grad	29
<\$30,000	10
\$30,000-\$74,999	13
\$75,000+	26
Urban	21
Suburban	15
Rural	3

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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There are no substantial differences in ride-hailing usage across gender or racial lines: Men and women are equally likely to use these services, as are whites, blacks and Latinos.

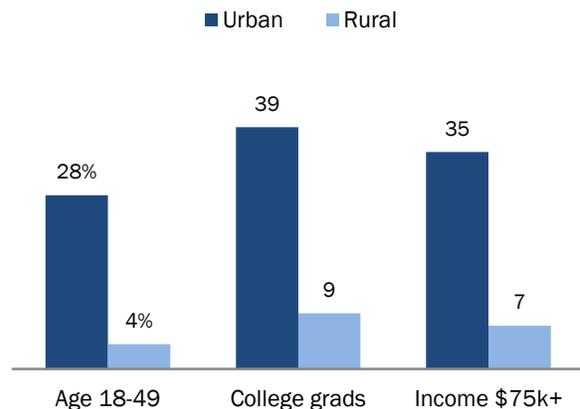
Ride-hailing use is strongly concentrated among urban residents, and several urban demographic groups use ride-hailing at especially high rates

Ride-hailing apps primarily offer their services in and around urban areas – and accordingly, both usage and awareness of these services among rural residents is extremely low. One-in-five urban Americans (21%) have used ride-hailing services, as have 15% of those living in suburban areas. By contrast, just 3% of rural residents have used these services and more than half (54%) have never heard of ride-hailing apps.

And as is the case among the population as a whole, certain demographic subgroups living in urban areas – such as young adults, or college graduates – use ride-hailing at especially high rates. For instance, fully 39% of urban college graduates have used ride-hailing services at one point or another, as have 35% of urbanites earning more than \$75,000 per year and 34% of 18- to 29-year old urban dwellers.

Ride-hailing use is especially high among some urban residents; use by rural dwellers is consistently low

% of urban/rural Americans in each category who have used ride-hailing apps



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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Conversely, usage by rural residents is consistently low – even among groups with high levels of usage at the general population level. For instance, just 9% of rural college graduates have used a ride-hailing service (versus 39% of their urban counterparts), as have 4% of rural residents under the age of 50 (compared with 28% of urbanites younger than 50).

27% of Americans are familiar with ride-hailing apps and aware that these services are offered in their area, but have not yet used ride-hailing. And 8% of ride-hailing users say these services are not available where they now live

Among the 51% of Americans who are familiar with ride-hailing apps but have *not* used them personally, roughly half (52%) indicate that these services are available where they live. Another 19% say these services *are not* available where they live, while the remaining 28% are not sure if those services are offered where they live or not. Put somewhat differently, 27% of *all* American adults are both familiar with ride-hailing services and are aware that they live in an area where those services are offered, but have not yet tried ride-hailing themselves. However, 6% of these

nonusers have ridden with someone else using a ride-hailing service, even if they personally did not request the ride.

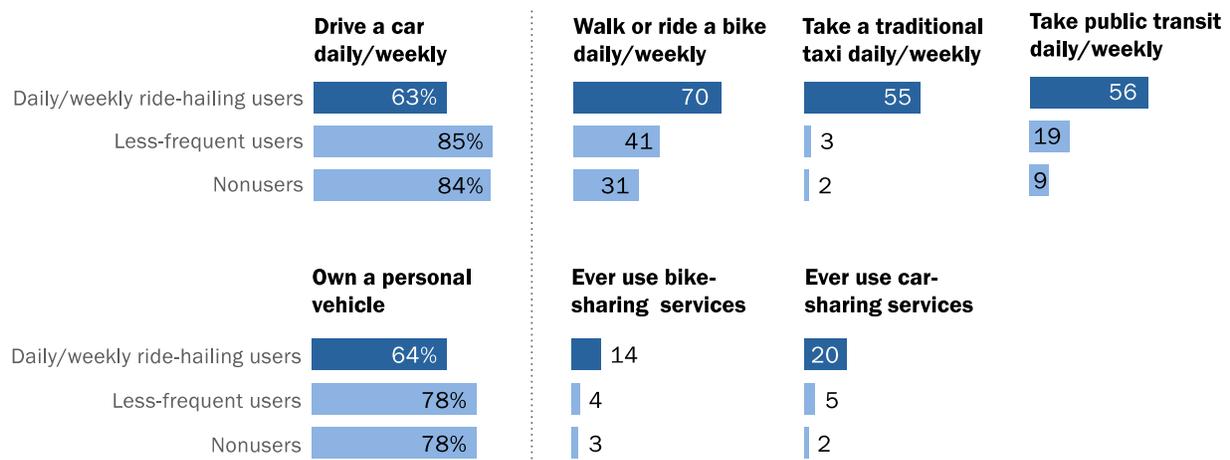
Not surprisingly, the vast majority of ride-hailing users say these services are available where they live – but a minority of users appear to use these services only when they are away from home. Some 8% of those who have used ride-hailing say these services are not available where they currently live. In fact, 6% of Americans who use ride-hailing regularly (on a daily or weekly basis) indicate that these services are not available in the location where they reside.

Frequent ride-hailing users are less likely than other Americans to own a car – but much more likely to use a number of other personal transportation options

As a relatively new phenomenon, the extent to which ride-hailing services replace or supplement other types of personal transportation has been the subject of some debate. Uber founder Travis Kalanick has [said in interviews](#) that one of the company’s long-term goals is to “get to where it’s cheaper to take Uber than to own a car,” but a New York Times [analysis](#) of Uber and taxi rider data in New York City found that use of taxis as well as ride-hailing is highest in neighborhoods with a robust public transportation infrastructure.

Frequent ride-hailing users less likely to own or drive a car, more likely to use a range of other transit options

% in each group who ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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These Pew Research Center data indicate that frequent ride-hailing use is indeed correlated with lower-than-average rates of personal vehicle use and ownership. But these regular ride-hailing users also use a wide range of personal transportation options that go well beyond ride-hailing alone – from taking public transit, to walking or biking, to using traditional taxi services.

To be sure, a majority of ride-hailing users – even those who use these services frequently – are vehicle owners and drive a car regularly. Roughly two-thirds (64%) of regular ride-hailing users³ say they own a personal vehicle of some kind, and 63% say they drive a car on a daily or weekly basis. However, each of these figures is substantially lower than among non-ride-hailing users, or among those who use ride-hailing services on a relatively infrequent basis: 78% of both nonusers and infrequent users own a personal vehicle, and more than eight-in-ten drive a car on a regular basis.

Yet even as these frequent ride-hailing users are less likely than other Americans to own or drive a car, they are significantly *more* likely to use a wide range of other personal transportation options in addition to ride-hailing. Among daily or weekly ride-hailing users, 70% report that they regularly walk or ride a bike somewhere; 56% regularly take public transportation; 55% regularly use traditional taxi services; 20% ever use personal car-sharing services such as Car2Go or ZipCar; and 14% ever use bike-sharing services. In each instance, frequent ride-hailing users are significantly more likely than other Americans to engage in these behaviors.

A substantial majority of ride-hailing users are aware of the debate over how best to regulate these services – and these users feel strongly that ride-hailing services should not be required to follow the same rules and regulations as incumbent taxi operators

At the same time that ride-hailing services have upended the market for traditional taxi services, they also have posed new challenges to long-standing legal and regulatory structures in [cities across the country](#), as well as abroad. Indeed, a [Wikipedia page](#) is dedicated to tracking the current legal status of Uber service in various cities around the globe. The specific regulatory issues at play differ from city to city – but on a broad level this debate often boils down to whether these new entrants to the for-hire vehicle market should be subject to the same rules and regulations as legacy taxi services that operate under a quasi-government monopoly in exchange for relatively strict rules regarding issues such as insurance requirements, handicap access or fares and rates.

³ “Regular users” are defined as those who use ride-hailing services on a daily or weekly basis.

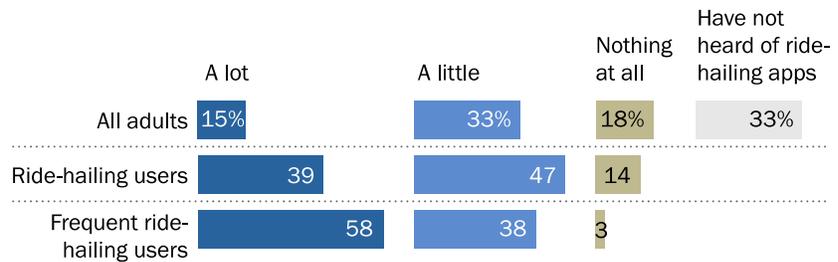
The survey asked two separate questions relating to ride-hailing and regulation. First, it asked respondents how much (if anything) they have heard about the debate over how best to regulate ride-hailing services. Second, those who have been following this debate were asked whether ride-hailing services should be required to follow the same general rules and regulations as existing taxi operators, or if they should be free to operate outside of this existing framework.

Looking at the population as a whole, about half the public (48%) is at least somewhat familiar with the debate over how to best regulate ride-hailing services, although most have not been following it deeply. Some 15% of Americans say they have heard “a lot” about this debate, while 33% have heard “a little” and 18% have heard “nothing at all.” (The remaining 33% of Americans have never heard of ride-hailing apps in the first place.)

The share of Americans who have at least some familiarity with the debate over ride-hailing regulation tend to favor a hands-off approach to regulating these services – if only by a slim margin. Some 42% of these Americans feel that these services should *not* be required to follow the same rules and regulations as existing taxi companies, while 35% think that they *should* have to follow these rules (the remaining 23% are not sure how they feel about this issue).

Frequent ride-hailing users have been following the debate over ride-hailing regulation especially closely

% in each group who have heard ... about the debate over how to best regulate ride-hailing services such as Uber or Lyft

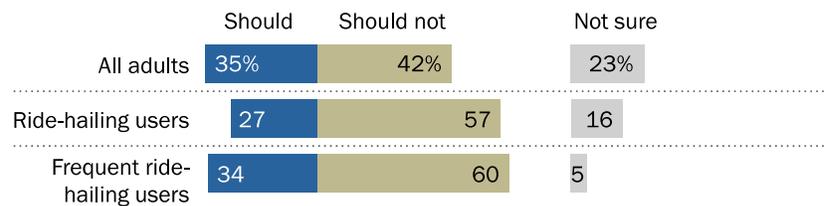


They also tend to feel that these services should not be subject to existing regulations

Among those who have heard about the regulation debate, % who say the following statement is closest to their view



Services like Uber and Lyft ... be required to follow the same rules and regulations as taxis



Note: Frequent users are those who use ride-hailing services on a daily or weekly basis.

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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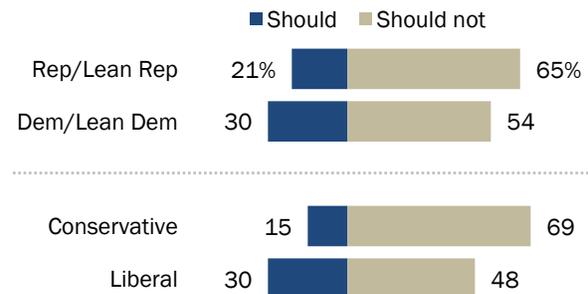
But if the public as a whole is not following these debates especially intently, ride-hailing users themselves are paying much closer attention to this issue. Fully 85% of ride-hailing users have at least some familiarity with the regulatory debates surrounding these services, with 39% indicating that they have heard “a lot” about them. Frequent users (those who use ride-hailing on a daily or weekly basis) are paying especially close attention: An overwhelming 97% of these regular users indicate that they have heard at least something about the controversy over ride-hailing regulation, with 58% indicating that they have heard a great deal about it.

In addition to following this debate more closely than the average American, ride-hailing users also feel more strongly that ride-hailing services should *not* be subject to the same rules and regulations as existing taxi companies. Among ride-hailing users who have heard of this debate, 57% believe that these services should not be required to follow the regulations that are in place for incumbent providers – compared with 27% who believe that existing rules and regulations should in fact apply to these new market entrants (another 16% of these users are not sure how they feel).

This general anti-regulatory attitude is particularly notable given the overall political leanings of ride-hailing users as a group: As a whole, ride-hailing users are twice as likely to identify as Democrats as Republicans (65% identify with or lean toward the Democratic Party, while 33% identify as or lean Republican). In addition, ride-hailing users are also roughly twice as likely to identify as liberal as to identify as conservative. And not only is this group relatively liberal in their overall political attitudes, but ride-hailing users who identify with or lean toward the Democratic Party believe (by a 54% to 30% margin) that these services should *not* have to follow the same regulations as incumbent providers. Similarly, ride-hailing users who identify as political liberals tend to believe (by a 48% to 30% margin) that a flexible approach to regulating these services is most appropriate.

Liberal and conservative users agree that ride-hailing services should not have to follow existing taxi regulations

% of ride-hailing users in each group who feel that these services should/should not be required to follow same rules and regulations as existing taxi services



Note: Based on users who have heard at least something about regulatory debate over ride-hailing services.

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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To be sure, Republican and/or conservative ride-hailing users tend to have a more anti-regulatory attitude than Democratic and/or liberal users, but the clear preference for a light regulatory approach among partisans in all camps is striking.

Users tend to view ride-hailing services as software platforms, not transportation companies, and see their drivers as independent contractors rather than employees. Yet they expect these services to play a prominent role in managing the customer experience

In addition to whether or not ride-hailing apps should be regulated in the same way as legacy taxi services, a second major policy debate surrounding these services (as well as many others in the so-called “[gig economy](#)”) is over whether ride-hailing drivers are *employees* of those services or *independent contractors* who work for themselves.

Ride-hailing services have long maintained that they do not have an employer/employee relationship with the drivers who use their products – rather, they are a technology platform or marketplace that allows independent drivers to connect with customers in need of their services. Indeed, these services [often argue](#) that this independent-contractor relationship is precisely what allows these services to remain commercially viable, since the firms can provide greater flexibility and independence to workers while offering their services at a low cost to end users.

By contrast, many drivers and worker advocacy groups argue that these services engage in a variety of behaviors that make them employers in all but name. A recent [class-action lawsuit](#) brought by Uber drivers, for instance, argued that these drivers “... are required to follow a litany of detailed requirements imposed on them by Uber and they are graded, and are subject to termination, based on their failure to adhere to these requirements (such as rules regarding their conduct with customers, the cleanliness of their vehicles, their timeliness in picking up customers and taking them to their destination, what they are allowed to say to customers, etc.).” The suit, which was settled after this survey was conducted, contended that drivers should therefore be afforded the various rights and protections that accrue to employees under law.

When asked about their view of the relationship between ride-hailing services and the drivers who operate under those services, users tend to side with the notion that these services are software platforms rather than transportation companies, and that their drivers are independent contractors rather than employees. But these views are far from universal – and users also expect ride-hailing companies to play a hands-on role in some traditional employer behaviors, such as making sure that drivers are trained appropriately and generally vouching for the overall customer experience.

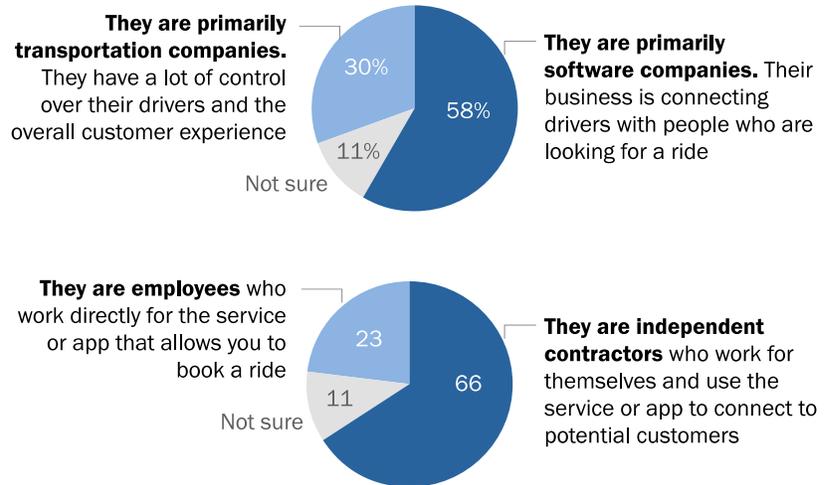
When presented with two alternative descriptions of ride-hailing services, 58% of users indicate that they see them as *software companies* that simply connect drivers with people who are looking for a ride. Meanwhile, 30% side with the notion that they are *transportation companies* that have a great deal of control over their drivers and the overall customer experience. Frequent ride-hailing users (those who use these services weekly or more often) feel especially strongly about this subject, siding with the view that these services are software companies by a 70% to 26% margin.

Similarly, when asked to choose between two alternative descriptions of the drivers who work with these services, fully 66% of users describe them as *independent contractors* who simply use these services to connect to potential customers. This is nearly three times the share of users (23%) who view ride-hailing drivers as *employees* who work directly for the app or service that

customers use to book a ride. Interestingly – and in contrast with their views on the preceding question – frequent users are actually a bit more likely than other users to view ride-hailing drivers as employees, rather than independent contractors: 35% of these frequent users describe these drivers as employees, while 59% describe them as independent contractors.

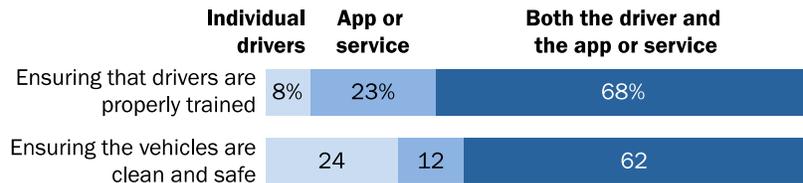
Americans who use ride-hailing services tend to view them as software platforms that connect independent drivers with people seeking a ride ...

% of ride-hailing users who describe these services and the drivers who use them as follows:



... But expect these services to play a role in managing the customer experience

% of ride-hailing users who think ... is/are responsible for ensuring the following aspects of service are achieved



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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Yet even though they largely tend to view ride-hailing companies in the abstract as platforms that connect independent contractors with people needing rides, when pressed on this issue many ride-hailing users have an expectation that these companies will play at least some role in managing various aspects of the day-to-day customer experience:

- 68% of ride-hailing users believe that both drivers and the services themselves should be responsible for making sure that drivers are properly trained. One-quarter (23%) believe this is the sole responsibility of the services, while 8% think it is the responsibility of each individual driver.
- 62% of users believe that both drivers and services should be responsible for making sure that the vehicles customers request are clean and safe. Some 12% think this is the responsibility of the services alone, while 24% think it is up to individual drivers to ensure this.

As is true of many aspects of ride-hailing, frequent users of these services feel differently about these issues than occasional users – although their views do not consistently place greater responsibility on drivers or on ride-hailing services themselves. On the one hand, these frequent users assign greater responsibility to *ride-hailing services* when it comes to initial driver training: 33% of frequent users and 21% of occasional users believe that this is the sole responsibility of the services. On the other hand, frequent users assign more responsibility to *drivers* when it comes to day-to-day vehicle safety and maintenance: 36% of frequent users and 22% of occasional users believe that this is the sole responsibility of individual drivers.

And while there are relatively few demographic differences on this issue, male ride-hailing users tend to assign greater responsibility for both driver training and general vehicle maintenance to drivers (as opposed to the app or service) compared with female users. Some 12% of male ride-hailing users feel that drivers should be solely responsible for their own training (just 4% of female users agree), while 29% of male users feel that drivers should be solely responsible for ensuring vehicle safety and cleanliness (compared with 19% of female users).

Users view ride-hailing services in largely positive terms – especially when it comes to saving riders time and stress and offering good jobs to those who want flexible working hours

Like many new technologies, the popular discussion about ride-hailing apps has been marked by strong views on both sides. Ardent supporters of ride-hailing promote these services as a potential solution to a wide range of ills – from helping people who might have trouble hailing taxi cabs due to their race or appearance, to providing independence for older adults who aren't able to drive on their own. Detractors, on the other hand, view these services as a luxury good for people with plenty of existing transportation options, or worry about the potential privacy implications of the vast store of user data they collect.

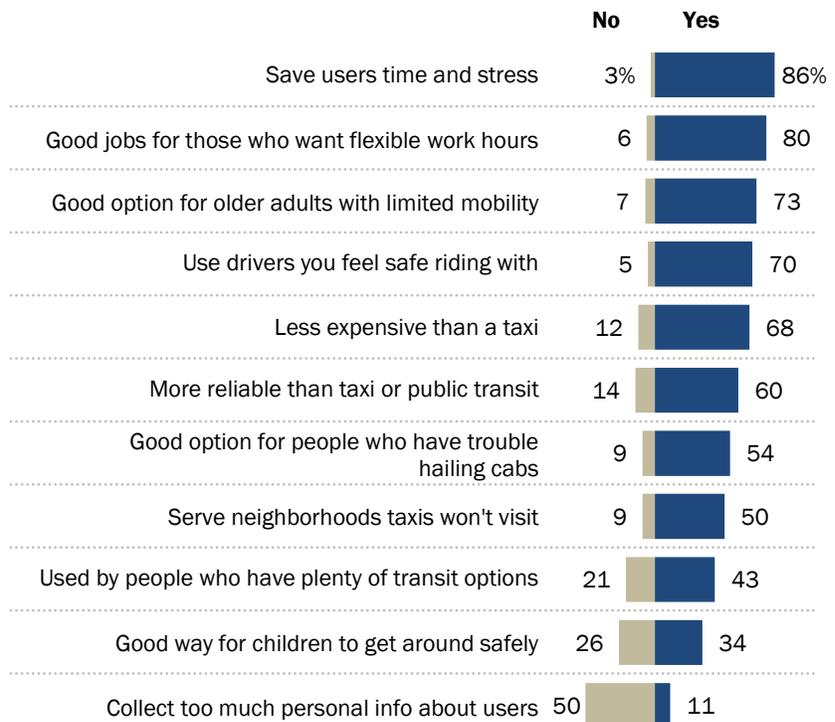
In an effort to probe public attitudes toward these services more deeply, the survey presented ride-hailing users (as well as those who are familiar

with these services, even if they have not actually used them) with a list of 11 attributes that might describe ride-hailing services and asked them to indicate which ones they think describe these services well and which do not. Out of these 11 attributes, four in particular earn widespread approval (and negligible dissent) from users of ride-hailing services:

- 86% of ride-hailing users indicate that these services *save their users time and stress*, with just 3% indicating that this statement does not describe ride-hailing well. Nonusers are also

Users' views of ride-hailing services are largely positive

% of U.S. ride-hailing users who feel that the following statements describe these services well, or not



Note: Don't know responses not shown.

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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inclined to see these services in a positive light on this front (by a 44% to 5% margin) although 49% are not sure if this is a good description of ride-hailing or not.

- 80% of ride-hailing users believe that these services *provide good jobs for people who want flexible working hours*, with just 6% indicating that this statement does not describe these services well. Nonusers are also positively disposed toward ride-hailing services on this front, with 58% saying this statement describes ride-hailing services well.
- Ride-hailing users (and to a somewhat lesser extent, nonusers) also tend to view ride-hailing services as a *good option for older adults who have a hard time getting around on their own*. Some 73% of ride-hailing users indicate that this statement describes these services well, as do 51% of nonusers. Interestingly, 10% of ride-hailing users ages 18-29 believe this statement does *not* describe ride-hailing services well, compared with just 3% of users ages 50 and older.

Lastly, ride-hailing users tend to broadly support the notion that these services *use drivers they feel safe riding with*. Seven-in-ten ride-hailing users (70%) say this statement describes these services well, while only 5% of users feel that this is not the case (the remaining 24% are not sure how they feel on this subject). Nonusers are more than twice as likely to agree (24%) as disagree (9%) with this statement, though 66% are not sure how they feel.

News reports about the safety of ride-hailing often place a particular emphasis on the safety of female passengers – and this survey does find some modest evidence that female passengers are a bit more concerned about the driver-safety issue than men. Some 7% of female ride-hailing users believe this statement does *not* describe these services well, double the 3% of men who feel the same way. At the same time, a substantial 68% majority of female ride-hailing users feel that this statement does in fact describe ride-hailing services well. In addition, driver safety concerns do not appear to be a particular barrier to entry for women who currently do not use these services. Some 23% of female nonusers (and 24% of men) feel that this statement describes ride-hailing services well, while 8% of female nonusers (and 10% of men) believe it does not describe them well.

Users' attitudes on the subject of driver safety are also correlated with how often they themselves use ride-hailing services: Frequent users (those who use these services on a daily or weekly basis) are simultaneously more positive *and* more negative on the subject of driver safety compared with infrequent users. Fully 82% of these frequent users feel that ride-hailing services use drivers they feel safe riding with (compared with 69% of infrequent users). At the same time, 13% of frequent users feel that this statement does *not* describe these services well (compared with just 3% of infrequent users). Put differently, frequent users are simply more likely to have some sort of opinion (whether a positive or negative one) on whether or not they feel safe with ride-hailing drivers: Just 4% of frequent users are not sure if this statement describes ride-hailing services well, while 28% of less-frequent users don't have a strong opinion one way or the other.

Along with these attributes on which there is especially strong agreement among users, the survey asked about several other attributes on which ride-hailing users largely agree – if not always as consistently as on those listed above.

- 68% of ride-hailing users agree that ride-hailing services are *less expensive than taking a taxi*, although 12% do not think this statement describes these services well and an additional 20% are not sure if ride-hailing is cheaper than a traditional taxi service or not. Roughly two-thirds of nonusers (64%) are unsure how these two services stack up in terms of price, although 29% think that ride-hailing offers a cost savings over more traditional options.
- 60% of users think that ride-hailing services are *more reliable than taking a taxi or public transportation* – although 14% indicate that this statement does not describe these services well. Frequent riders feel especially strongly that these services are more reliable than other options: Fully 77% of frequent ride-hailing users feel this statement describes ride-hailing services well, compared with 57% of those who use ride-hailing less frequently. Interestingly, users' views on this issue are quite consistent regardless of whether they themselves use taxi or public transit services: Some 60% of ride-hailing users who also use public transit services feel that this statement describes ride-hailing well, as do 63% of ride-hailing users who also use traditional taxi services at least on occasion.

Ride-hailing companies and their supporters often argue that these services can help address some common complaints about traditional taxi services. First, because users book these services through a smartphone app rather than in person, they might offer a better option for people whose race or appearance makes it difficult for them to hail a cab on the street. Similarly, because the supply of vehicles using these services is not capped or limited in the same way as traditional taxi services often are, they have the potential to serve low-income or less-centrally located neighborhoods where taxis are often scarce.⁴ Overall, around half of ride-hailing users tend to view these services as a potential solution to each of these challenges – although many are not sure how they feel about this issue:

- 54% of users feel that ride-hailing is a *good option for people who have trouble getting taxis to pick them up based on their race or appearance*, while just 9% of users feel that this statement does not describe ride-hailing well (the remaining 37% are not sure).⁵

⁴ Uber has commissioned a study comparing taxi service with ride-hailing in low-income neighborhoods in Los Angeles: <http://botecanalysis.com/wp-content/uploads/2015/07/LATS-Final-Report.pdf>

⁵ Typically the debate over this issue centers around the difficulty that blacks often experience hailing taxi cabs on the street. However, the number of black ride-hailing users in this survey (n=61) is too small to report on this group separately from other ride-hailing users.

- 50% of users feel that ride-hailing services *serve neighborhoods that taxis won't visit*, with 9% indicating that this statement does not describe these services well and 41% indicating that they are not sure.

Where supporters point to ride-hailing as a way to combat discrimination and help underserved neighborhoods, detractors often argue that these services are largely a luxury item for people who have plenty of other transportation options. The survey finds some support for this view as well, although by a less substantial margin:

- 43% of ride-hailing users agree that these services are *mostly used by people who already have plenty of ways to get around*, although 21% feel that this is not the case and 36% are not sure what to think.

Finally, there are two attributes that ride-hailing users generally think do *not* apply to these services. As noted above, most users feel that these services are an excellent option for older adults – but they are much less comfortable with their use by unaccompanied minors. Only around one-third (34%) of ride-hailing users feel that these services are a *good way for parents to make sure their children get around safely when they can't drive them*, with 26% indicating that this statement does not describe these services well (40% are not sure). Nonusers are even more apprehensive on this issue: just 17% think these services are a good option for children, while 28% think they are not.

Interestingly, there are no differences between parents and non-parents on this question: 30% of ride-hailing users who are parents feel that this attribute describes ride-hailing services well, similar to the 35% of non-parents who agree. But frequent users are more likely than occasional users to feel that these services are a good option for parents with small children: 47% of these frequent users believe this statement describes ride-hailing well, compared with 31% of occasional users.

Privacy concerns around the retention of users' personal data is the second issue that largely fails to register with ride-hailing users. In contrast to traditional taxi services (which can be used relatively anonymously) ride-hailing services collect a substantial amount of personal information about their users: from payment information to detailed trip and location histories. Yet by a five-to-one margin, ride-hailing users reject the notion that these services *collect too much personal information about their customers*. Just 11% of ride-hailing users feel that this statement describes these services well, while 50% disagree (the remaining 39% of users are unsure if this describes ride-hailing services well or not). Nonusers generally do not have strong feelings on this

issue one way or another: fully 77% are not sure if ride-hailing services collect too much personal information about their users or not.

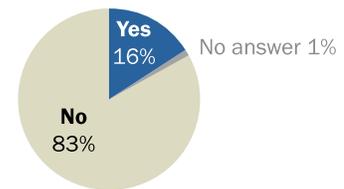
16% of ride-hailing users have personally had a bad experience with these services at one point or another, although 83% have never experienced this

Most users indicate that their experiences with ride-hailing services have been universally positive. Fully 83% of ride-hailing users have never had a bad experience while using these services, while 16% report that they have had a negative experience at some point or another. Daily or weekly users of these services are more likely than less-frequent users to have had a negative ride-hailing experience: 53% of frequent users say they have had a negative ride-hailing experience at some point or another, although a roughly equal share (47%) report that they have never had any sort of bad experience using ride-hailing.

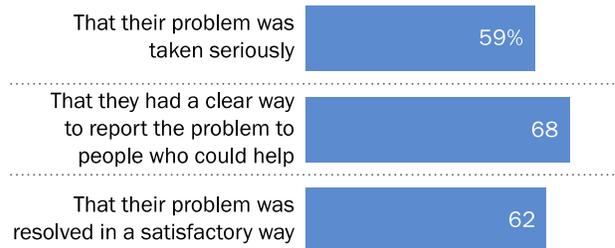
Younger users (who as noted earlier tend to use these services on a relatively frequent basis) also tend to encounter bad experiences at higher-than-average rates: 20% of users ages 18-29 have had this happen to them, compared with 9% of users ages 50 and older. And men and women encounter bad experiences with ride-hailing with similar frequency: 14% of male users have had some sort of bad experience with ride-hailing in the past, similar to the 18% of female users who have done so.

16% of ride-hailing users have ever had a bad experience with these services

% of U.S. ride-hailing users who have ever had a bad experience using one of these services



Among those who had a bad experience, % who felt about their most recent experience:



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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When asked about their most recent negative experience and how it turned out, a majority of users – though by no means all – feel that they had a clear way to report their problem, and that it was ultimately resolved in a satisfactory way. Among the 16% of users who have had a bad experience using ride-hailing services:

- 68% feel that there was a clear way to report the problem to people who could help
- 59% feel that their problem was taken seriously
- 62% feel that their problem was ultimately resolved in a satisfactory way

Just as ride-hailing users are much more likely to have good experiences than bad experiences using these services, nonusers are much more likely to have heard positive things about ride-hailing than they are to have heard negative things. Among nonusers who are aware of ride-hailing, 55% have heard of others having good experiences with these services – double the 28% who have heard of others having bad experiences with ride-hailing.

And as was the case with users' own experiences, male and female nonusers encounter similar opinions of ride-hailing in their interactions with others. Among male nonusers, 54% have heard of other people having good experiences with ride-hailing and 29% have heard of other people having bad experiences. Among female nonusers these figures are nearly identical: 56% of women have heard of others having good experiences, and 26% have heard of others having negative experiences.

3. Shared: Home-sharing services

Home-sharing services are perhaps the classic example of a “sharing economy” platform. These services provide a platform for matching people who are looking for a place to stay for a period of time with other people who have some sort of space available that they are willing to rent. Typically this space is a home, apartment or extra bedroom, but could be anything – from a couch in a common area to a [private island](#).

In many ways, these services function as an internet-enabled version of the [boarding houses](#) and bed and breakfasts of an earlier era, albeit on a far grander scale: Airbnb alone [represents](#) as much as 17% of available short-term room occupancy in several major cities across the globe, and offers more rooms to the public than many major hotel chains. As a result, questions such as the rights of customers and how these services are regulated have taken on greater salience in recent years. This chapter of the report examines Americans’ usage of and attitudes toward these home-sharing services.

11% of American adults have used an online service such as Airbnb, VRBO or HomeAway to stay overnight in a private residence, but half have never heard of these services before

In total, roughly one-in-ten American adults (11%) say they have stayed overnight in a private residence that they booked using a home-sharing site such as Airbnb, VRBO or HomeAway. Some 34% of Americans are familiar with these services but have not actually used them, and around half (53%) have never heard of these services before.

As was the case with ride-hailing apps (see [Chapter 2](#) of this report), usage and awareness of home-sharing platforms are especially high among college graduates and the relatively affluent – groups that are [more likely](#) than less-well-off Americans to take regular trips or vacations in the first place:

- 25% of college graduates have used home-sharing platforms, while 26% have not heard of them. Among

Home-sharing services especially popular with college grads, Americans with higher incomes

% who have used an online service like Airbnb, VRBO or HomeAway to stay overnight in a private residence

All U.S. adults	11%
Men	10
Women	13
White	13
Black	5
Latino	9
18-29	11
30-49	15
50-64	10
65+	6
HS grad or less	4
Some college	8
College grad	25
<\$30,000	4
\$30,000-\$74,999	9
\$75,000+	24
Urban	14
Suburban	11
Rural	6

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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those who have not attended college, just 4% have used these services and nearly three-quarters (73%) have never heard of them before.

- 24% of Americans who live in a household with an annual income of \$75,000 or more have used these services, while 31% have never heard of them. For those living in households with an annual income of less than \$30,000, just 4% have used these services and 69% are not familiar with them at all.

At the same time, home-sharing services appeal to a relatively broad age spectrum. Americans ages 35-44 are nearly twice as likely to have used home-sharing services as those ages 18-24 (16% vs. 9%), and the median age of home-sharing users in the United States is 42 – nearly a decade older than the median age of ride-hailing users (33).

Also in contrast with ride-hailing apps, where there were no significant differences across racial or ethnic groups, whites are more likely than blacks to use home-sharing services (13% of whites have done so, vs. 5% of blacks). And while urban and suburban residents use home-sharing at higher rates than rural residents, this difference is much less dramatic than was true of ride-hailing.

37% of home-sharing users – representing 4% of all American adults – have used these services to stay in a shared space in someone’s home

One key way in which home-sharing services differ from traditional hotels is that they give users the option of booking a shared space in someone’s home. These shared spaces might range from a separate bedroom in an otherwise-occupied home to a couch in someone’s living room. In fact, services like [Couchsurfing](#) promote their “hosts” (in other words, homeowners) as quasi-tour guides who can help guests live like a local while on vacation.

Overall, some 37% of home-sharing users (which works out to 4% of all American adults) report that they have used these services to reserve a single room or other type of shared space in someone’s home. These shared-space accommodations are more popular among men than among women, and more popular among younger users than among older ones. Just over half (55%) of 18- to 29-year-old home-sharing users have booked a shared space in someone’s home, compared with 32% of users ages 30-49 and 31% of users age 50 and older. Similarly, 43% of male home-sharing users have booked a shared space in someone’s home, compared with 32% of female users.

At the same time, not all users who stay in shared spaces are completely unconcerned about doing so: 48% of those who have done this indicate that they worry about staying with someone they have never met before, although 52% say this is not something they worry about. And while men are more likely than women to stay in a shared space, men and women who use home-sharing

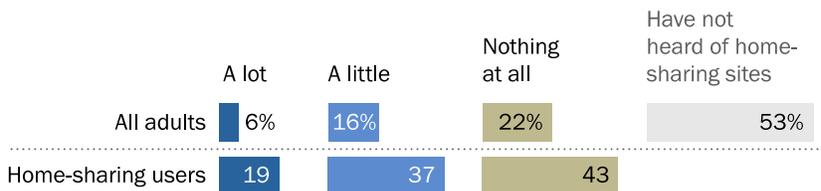
services in this way express similar levels of concern about staying with a stranger (45% of men who use home-sharing services in this way say this is something they worry about, as do 51% of women).

Most home-sharing users are not following the regulatory debate over these services particularly closely; those who are following this issue tend to not favor hotel or lodging taxes for owners

Like ride-hailing apps, home-sharing services have been the subject of much legal and regulatory scrutiny in recent years. Officials in New York City have been in a long-standing battle over the legality of these short-term rental services, with the New York state attorney general [estimating](#) that more than 70% of available rentals on these services are in fact illegal – either for failure to collect and report occupancy taxes or for violating the state’s “multiple dwellings” law. And in California, the Santa Monica City Council recently [passed a law](#) severely restricting the city’s short-term rental market, while voters in San Francisco recently defeated [Proposition F](#), which would have similarly restricted home-sharing services in that city.

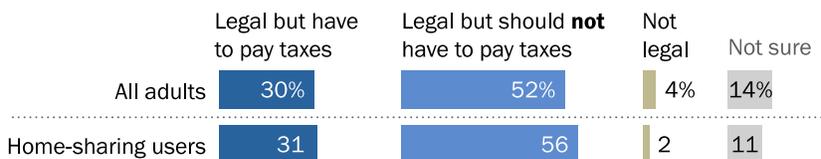
Around one-in-five Americans have heard of the debate over the legality of home-sharing services

% in each group who have heard ... about the debate over whether or not homeowners should be able to legally rent out their homes using services like Airbnb, VRBO or HomeAway



And both users and nonusers strongly support the legality of these services; they also feel (if less strongly) that homeowners using these services should not have to pay taxes in order to use them

Among those who have heard about this debate, percent who say these services should be ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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As with ride-hailing apps, the specific regulatory issues at play in these debates vary from city to city. But in most cases, this controversy centers around two major questions: first, whether it should be legal for residents to rent out their homes using these services in the first place; and

second, whether they should be legally required to pay some form of hotel or occupancy tax in order to do so.

The survey asked two separate questions relating to home-sharing platforms and how these services should (or should not) be regulated. First, it asked respondents how much (if anything) they have heard about the debate happening in various cities over the legality of home-sharing services. Second, those who are aware of the debate were asked if they feel those services should be legal, and/or if owners renting their homes on these services should be subject to local hotel or lodging taxes.

In general, Americans are much less aware of the debate over the legality of home-sharing services than they are of the debate over the regulation of ride-hailing apps. Just 22% of Americans have heard of the debate over whether or not these services should be legal (6% have heard “a lot” and 16% have heard “a little”) while 76% have either not heard of the debate, or have not heard of home-sharing platforms in the first place. As noted in [Chapter 2](#) of this report, nearly half of all Americans have heard at least something about the debate over the regulation of ride-hailing services.

Even users of home-sharing services are not following this issue particularly closely. Just 19% of home-sharing users have heard “a lot” about this debate (as noted in [Chapter 2](#), 39% of ride-hailing users have heard a lot about the debate over regulating those services), while 37% have heard “a little.” Indeed, fully 43% of home-sharing users are not aware of this debate at all, roughly three times the comparable figure for ride-hailing users (just 14% of whom are not aware of the regulatory debate over these services).

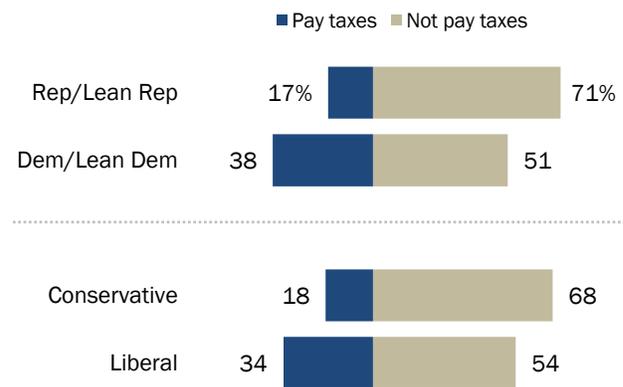
Although home-sharing users have not been following the legal debate over these services with nearly the same intensity as their ride-hailing counterparts, those home-sharing users who have been following this issue tend to feel that these services should be both legal and tax-free for owners. Among home-sharing users who are aware of the legal debate over these services, 56% believe that these services *should* be legal and that owners *should not* have to pay any local hotel or lodging taxes; 31% believe that owners should be able to legally rent out these services but should have to pay taxes for the privilege of doing so.

As might be expected, users who are ideologically conservative, along with those who identify with or lean toward the Republican Party, feel overwhelmingly that people renting out their homes on these services should not have to pay any sort of taxes in order to do so. But this view is also held – albeit to a lesser degree – by users of these services who are to the left of the political spectrum. Users who are Democrats or lean Democratic believe (by a 51% to 38% margin) that homeowners who use these services should *not* have to pay taxes as a condition of doing so, and liberal users take an anti-tax stance by a similar margin (54% to 34%).

Indeed, even among those Americans who are not home-sharing users but have heard of this debate, 50% feel these services should be legal and that owners should not have to pay taxes; 30% feel they should be legal and that owners should have to pay these taxes; and just 5% think these services should not be legal at all.

Both conservative, liberal home-sharing users feel that owners should not have to pay taxes to use these services

% of U.S. home-sharing users in each group who feel that owners should/should not be required to pay hotel or occupancy taxes to use these services



Note: Based on users who have heard at least something about regulatory debate over home-sharing services.

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Users view home-sharing as a good option for people who travel as a group, as well as for homeowners looking to supplement their income; relatively few view these services as risky to use

When presented with a list of seven attributes that might describe home-sharing services, users respond especially strongly to two in particular: Some 87% of home-sharing users believe that these services are a good option for families or other people who like to travel as a group, while 85% believe that these services are a good way for homeowners to earn extra income. A substantial majority (73%) also believes these services are less expensive than a hotel (just 12% think this does not describe these services well).

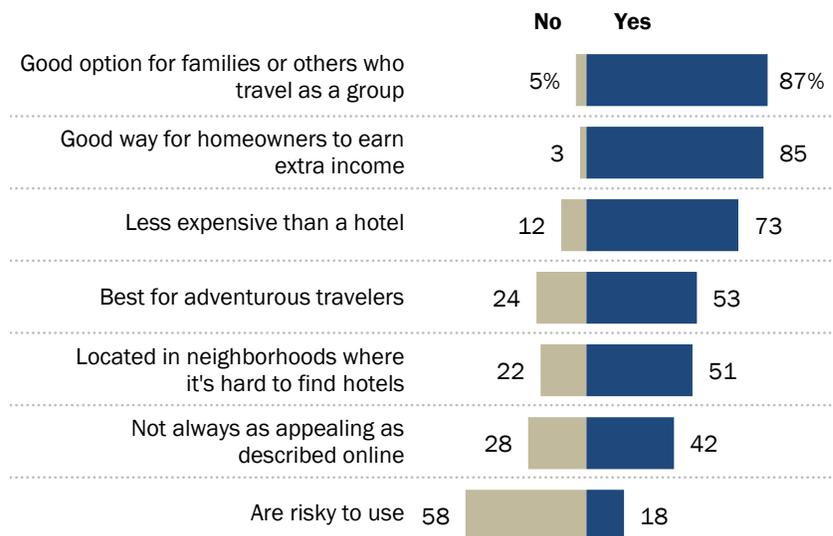
Users are somewhat more divided on other aspects of home-sharing. Around half believe that these services are

best for adventurous travelers (53% think this describes these services well). A similar number believe home-sharing services are located in neighborhoods where it is hard to find traditional hotels (51%). And while 42% of users believe that the properties available on these services are not always as appealing as they are described online, relatively few feel that these services are actually risky to use: 18% of users believe that this statement describes home-sharing services well, compared with 58% who think it does not describe them well.

Younger users are especially likely to view home-sharing services as best suited for adventurous travelers – fully 67% of users ages 18-29 feel that this statement describes home-sharing well, compared with 51% of users ages 30-49 and 48% of those age 50 and older. This difference might be related to the fact that younger users are more likely than older adults to use these services to

Home-sharing users view these services as good for people traveling as groups, homeowners looking for extra income

% of U.S. home-sharing users who feel that the following statements describe these services well, or not



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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stay in a shared or common space in someone’s home: 66% of home-sharing users who have stayed in this type of shared space feel that these services are best for adventurous travelers.

At the same time, there are other aspects of home-sharing to which older users are particularly responsive. For instance, 92% of users ages 30-49 and 89% of users ages 50-64 believe that home-sharing sites are a good option for families or other groups – substantially higher than the 77% share of younger users who agree.

And as was the case with ride-hailing apps, men and women do not differ dramatically when it comes to their perceptions of home-sharing services and user safety. Male and female users have nearly identical views on whether or not these services are risky to use (17% of men and 18% of women feel that this statement describes these services well), or whether they are best for adventurous travelers (53% of both women and men agree).

Nonusers⁶ tend to have mixed views about the relative merits of home-sharing services, although a substantial majority of nonusers view these services as a good way for homeowners to make extra income: Fully 65% of nonusers feel that this statement describes home-sharing services well, while just 5% believe this does not describe home-sharing well. The only attributes on which nonusers respond more strongly than users pertains to issues around user safety: nonusers are twice as likely as users to feel that these services are risky to use (36% vs. 18%).

Most users view home-sharing services as software platforms, not hospitality companies, yet expect these services to play a prominent role in managing various aspects of the overall customer experience

Much like ride-hailing services and traditional taxi services, the way that home-sharing platforms are structured differs dramatically from traditional hotel services. Despite providing listings for a vast number of properties, these services do not own, maintain or otherwise exert physical control over any of the properties involved. As a result, consumers might not always know whom to turn to when problems ranging from [payment issues](#) to [abusive hosts](#), injuries or even [death](#) emerge during their stay.

In general, users of home-sharing services tend to feel that these services are software platforms rather than traditional hospitality companies. When presented with two alternative descriptions of home-sharing services, some 58% of users indicate that they see them as *software companies* whose business is simply connecting people with a spare room or empty house with others who are

⁶ As in previous chapters, “nonusers” refers to nonusers who are aware of these services.

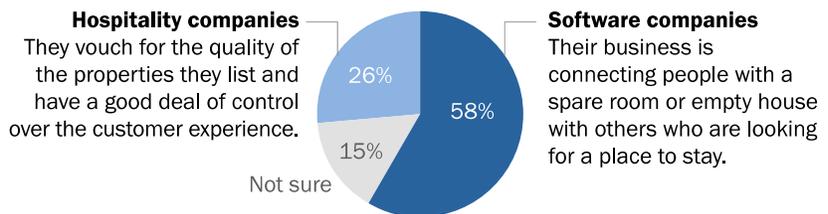
looking for a place to stay; meanwhile, 26% view them as *hospitality companies* that vouch for the quality of the properties they list and have a good deal of control over the customer experience.⁷

And as was true in the case of ride-hailing, home-sharing users expect these services to play a relatively substantial role in managing specific aspects of the day-to-day user experience when presented with specific follow-up examples:

- 67% of home-sharing users believe that *both* individual homeowners and the services themselves should be responsible for making sure that properties are described accurately. Just 8% think it is the sole responsibility of the app or service that people use to book their stay, while one-quarter (23%) believe it is the sole responsibility of individual homeowners.
- 57% of users believe that both homeowners and services should be responsible for resolving payment issues between hosts and guests. Three-in-ten (31%) think this is the responsibility of the services alone, while 11% think it is the responsibility of individual homeowners.
- 53% of users believe that both homeowners and services should be responsible for addressing problems that might come up during someone's stay. One-in-ten (10%) believe that this is the

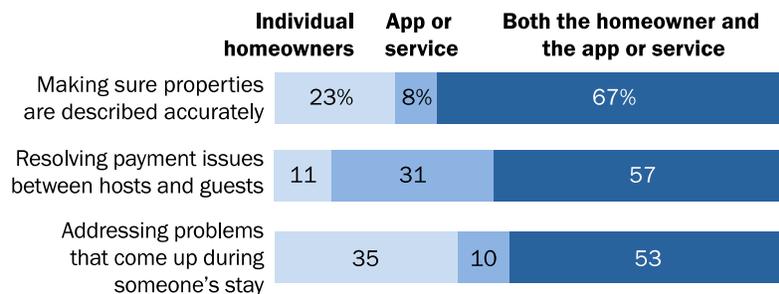
Home-sharing users tend to view these services as software platforms rather than hospitality companies

Among Americans who use home-sharing services, % who see them as ...



... But they expect these services to have at least some role in managing the overall customer experience

% of home-sharing users who think ... is/are responsible for ensuring the following aspects of service are achieved



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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⁷ Ride-hailing users have a nearly identical view of the providers of that service: 58% view them as software companies, while 30% view them as transportation companies.

sole responsibility of the app or service, while 35% believe it is the responsibility of the homeowner alone.

Overall, home-sharing users' views on this question are relatively consistent across various demographic categories, although there are some differences by gender, age and educational attainment. Male home-sharing users are more likely than female users (by a 66% to 53% margin) to view these services as software platforms rather than as hospitality companies. Similarly, 66% of users with a college degree view these services as software platforms, compared with just 46% of users who do not have a college degree. But despite these differences in their abstract views, men and women – as well as those with higher and lower levels of educational attainment – tend to place similar levels of responsibility on these services to help manage different aspects of the customer experience.

In addition to these differences around gender and education, younger users tend to place more responsibility on the app or service when it comes to making sure listed properties are described accurately, and on resolving payment issues between guests and hosts. Some 37% of users ages 18-29 feel that payment issues are solely the responsibility of the app or service (just 22% of users over the age of 50 agree). Meanwhile, 19% of users ages 18-29 feel that these services are obligated to make sure that properties are described accurately (a view that is shared by just 6% of users ages 30-49 and 4% of those 50 and older).

12% of home-sharing users have personally had a bad experience with these services at one point or another

As was true for users of ride-hailing apps, most home-sharing users indicate that their experiences with these services have been entirely positive. Some 12% of home-sharing users report that they have had a negative experience at some point or another, while 86% have never had a bad experience while using these services.⁸

Younger users are more likely than older users to have had a bad experience using home-sharing services at one point or another: 24% of users ages 18-29 have encountered this, compared with 10% of those ages 30-49 and 9% of those ages 50 and older. This may again be related to the fact that younger users are more likely than older users to use these services to stay in a spare room or other shared space in someone's home – users who do this are roughly twice as likely as other users to have had a bad experience with home-sharing (17% vs. 9%). On the other hand, this trend

⁸ The survey asked a series of follow-up questions asking users about their most recent bad experience; however, the number of users who received this question is too small to report these findings.

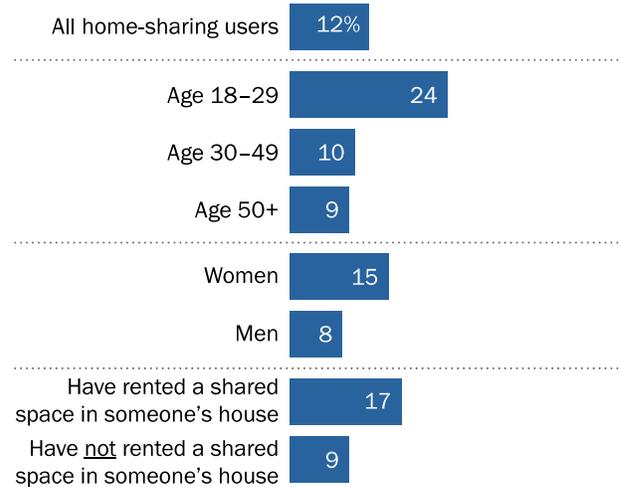
goes beyond home-sharing sites: As noted in [Chapter 2](#) of this report, younger adults are also more likely to report having a bad experience with ride-hailing apps as well.

And while women are no more likely than men to consider these services to be risky in a general sense, women who use home-sharing services are nearly twice as likely as men to have had a bad experience along the way: 15% of female home-sharing users have had some sort of negative encounter, compared with 8% of men (although it is worth noting that 83% of female home-sharing users have *never* had a bad experience using these sites).

Lastly, Americans who do not use home-sharing services are substantially more likely to have heard positive things about these services than they are to have heard negative things. Among nonusers who are aware of home-sharing services, 52% have heard of others having good experiences with these services, compared with 33% who have heard of others having bad experiences.

12% of users have ever had a bad experience with home-sharing services

% of U.S. home-sharing users who have ever had a bad experience using these services



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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4. Collaborative: Crowdfunding platforms

Along with commercialized sharing and on-demand access, collaboration is a third hallmark of the new digital economy. Thanks to a proliferation of open digital platforms, people around the world can join together to take part in a variety of collaborative activities – from creating and circulating [government petitions](#) to supporting [journalistic endeavors](#) or helping to [collect and share](#) information during natural disasters or other major events. The survey focused on one particular type of collaborative online platform: “crowdfunding” sites, which offer anyone the ability to start their own fundraising initiative, that others can contribute to and that supports a specific cause or goal. These findings are discussed in more detail below.

22% of American adults have contributed to a crowdsourced online fundraising project

Roughly one-in-five Americans (22%) report that they have contributed to an online fundraising project on a website like Kickstarter or GoFundMe. Some 41% have heard of these sites but have never contributed to a project that was being funded this way, and around one-third (36%) have never heard of these sites before.

As is true of many of the services discussed in this report, crowdfunding is particularly popular among college graduates and those with relatively high household incomes, and relatively rare among those 65 and older.

22% have contributed to a crowdsourced fundraising project

% who have contributed money to support a fundraising project on a site like Kickstarter or GoFundMe

All U.S. adults	22%
Men	19
Women	24
White	24
Black	19
Latino	16
18-29	30
30-49	27
50-64	18
65+	8
HS grad or less	11
Some college	24
College grad	35
<\$30,000	15
\$30,000-\$74,999	23
\$75,000+	30
Urban	25
Suburban	22
Rural	14

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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The vast majority of crowdfunding users have contributed to a handful of projects, with most making relatively small contributions

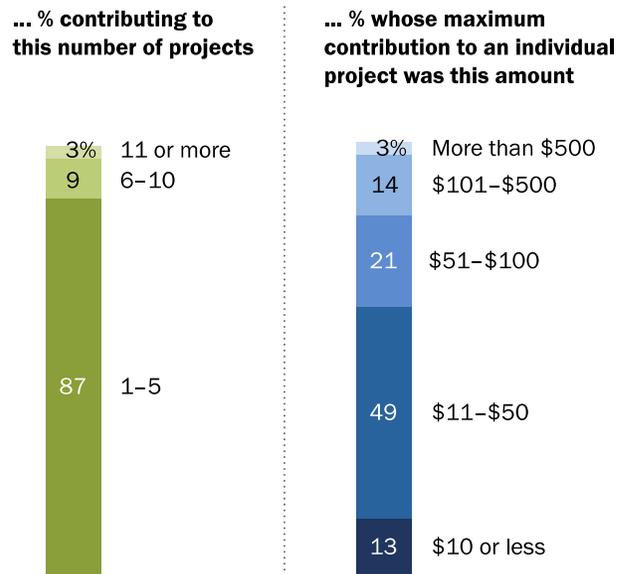
The overwhelming majority of crowdfunding users have contributed to a handful of projects: 87% of these donors say they have contributed to a total of five projects or fewer. Roughly one-in-ten (9%) have contributed to between six and 10 projects, while a small minority (3%) have contributed to more than 10 projects in total.

In terms of their monetary contributions to the projects they support, a majority of these donors say that \$50 is the most they have ever given to an individual project; 13% say that their largest donation has been \$10 or less, while 49% indicate that they have given between \$11 and \$50 at one time. At the same time, relatively large donations are also somewhat common. One-in-five crowdfunding donors (21%) have given between \$51 and \$100 to an individual project, 14% have given between \$101 and \$500, and 3% have donated more than \$500 to an individual project.

The maximum donation people have given to an individual crowdfunding project is highly correlated with how many total projects they have contributed to. Put simply, donors who have contributed to a relatively large number of projects are much more likely to have made a substantial monetary contribution to an individual project. Fully 43% of donors who have contributed to six or more projects have given more than \$100 to an individual project, including 14% of these frequent donors who have given more than \$500 at one time. By contrast, just 12% of donors who have contributed to five or fewer projects have made an individual contribution of more than \$100, and only 1% have contributed more than \$500 to a single project.

A majority of crowdfunding donors have made relatively modest monetary contributions to a handful of projects

Among the 22% of U.S. adults who have contributed to a crowdsourced online fundraising project ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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Contributions to help an individual in need – often a friend or family member – are the most common type of crowdfunding donation

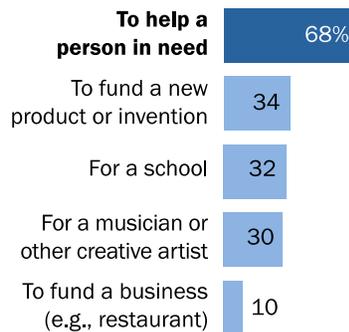
High-tech inventions like the [Pebble Time](#) or [Coolest Cooler](#) (which have raised \$20 million and \$13 million in Kickstarter funding, respectively, at the time this report was published) tend to dominate news stories about crowdfunding, as well as the “most-funded projects” lists on many of these platforms. But Americans who use these sites are especially likely to say that they have donated to a project geared toward helping someone in need. Some 68% of crowdfunding users report having contributed to a project to help an individual facing some sort of hardship or financial challenge.

These contributions to help someone in need are more often directed toward a person whom the donor already knows, as opposed to a stranger or a public figure. Among those who have contributed to this type of online project to help someone in need, 63% say they have given to help a friend of a friend or an acquaintance, while 62% have contributed to help a close friend or family member. By contrast, just 7% of these donors have given to a campaign to assist a public figure, while 28% have given to help someone who was not a public figure, but whom they did not know personally. In

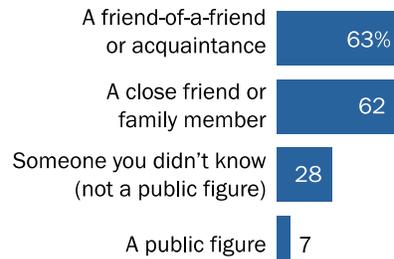
some instances, contributors to these sorts of projects donate out of a sense of pressure or obligation. Of the share of users who have contributed to a crowdsourced project to help someone in need, 14% (which works out to 2% of all American adults) have ever contributed to such a project primarily because they felt pressured by others to donate.

Projects to help a person in need – often a friend or family member – are the most popular use of crowdfunding platforms

% of U.S. crowdfunding donors who have contributed to a project ...



Among the 68% of donors who have contributed to a project to help a person in need, the % who donated to ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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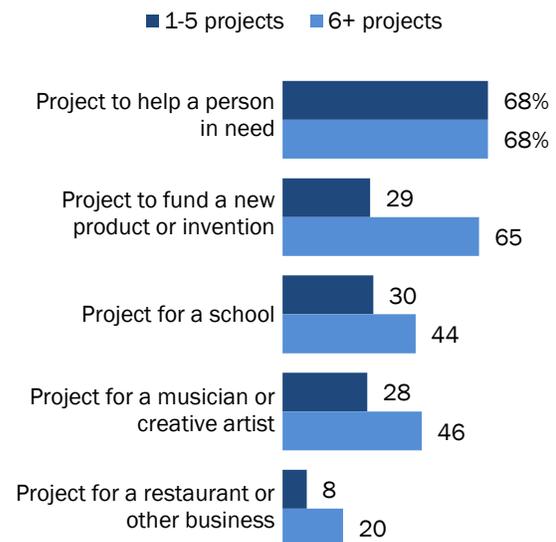
Projects to help someone in need are an especially widespread use of crowdfunding platforms, but contributions to other types of projects are relatively common as well. The survey asked about several other types of projects and found that:

- 34% of crowdfunding donors have contributed to a project to fund a new product or invention.
- 32% have contributed to a project for a school.
- 30% have contributed to a project for a musician or other creative artist.
- 10% have contributed to a project for a new restaurant or other type of business.

In addition to being the most popular type of donation in general, projects to help a person in need hold the widest appeal for frequent and infrequent donors alike. Some 68% of both casual donors (those who have contributed to five or fewer projects) and frequent donors (those who have contributed to six or more projects) have donated to projects of this sort. By contrast, other types of projects – especially those designed to fund a new product or invention – are much more popular among users who have contributed to a wide range of projects. Fully 65% of frequent donors have contributed to a project for a new product or invention, more than double the share of occasional donors (29%) who have done so. These frequent donors are also substantially more likely to have contributed to other types of fundraising projects (such as those to fund a musician or creative artist, or for a restaurant or other business) as well, although these differences tend to be more modest.

Efforts to help someone in need are the most popular crowdfunding projects for new and seasoned donors alike

% of U.S. crowdfunding donors who have given to a ... (among those who have contributed to 1-5 projects vs. those who have contributed to 6 or more)



Source: Survey conducted Nov. 24-Dec. 21, 2015.
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Female crowdfunding donors are more likely to contribute to help someone in need; men tend to contribute to a wider variety of projects, especially those funding new products or inventions

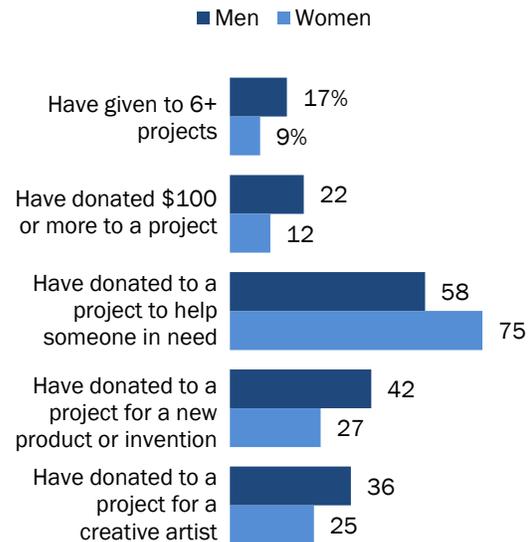
Overall, women are a bit more likely than men to donate to a crowdfunding project of any kind: 24% of women and 19% of men have done this. But among project contributors, men are much more active than women – both in terms of the number and type of projects they fund and the size of the contributions they make.

Male donors are roughly twice as likely as female donors to have contributed to six or more projects (17% of male donors have done so, compared with 9% of female donors), and also nearly twice as likely to have contributed more than \$100 to an individual project (22% vs. 12%). They are also substantially more likely to have contributed to projects seeking to fund a new product or invention, as well as projects for a musician or other creative artist. On the other hand, women are significantly more likely than men to contribute to a project to help someone in need – 75% of female donors have contributed to this type of project, compared with 58% of men.

Looking within the male donor population, younger men in particular stand out for their interest in funding projects relating to new products or inventions. Nearly half of men ages 18-49 who have contributed to a crowdfunding project (48%) have given to a project to fund a new product or invention – a figure that is substantially higher than the share of similarly aged women (31%), older women (20%) or older men (27%) who have done so. By the same token, younger male donors (that is, those ages 18-49) are substantially *less* likely to have contributed to a project to help someone in need – just 54% have done so, compared with 75% of younger women, 74% of older women and 67% of older men.

Male and female crowdfunding donors give differently and to different projects

% of male/female crowdfunding donors who ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.

“Shared, Collaborative and On Demand: The New Digital Economy”

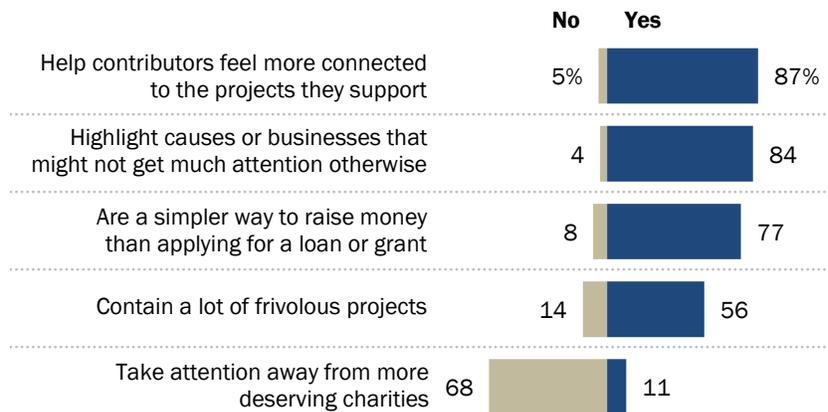
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Crowdfunding donors value their personal connection to the projects they support and the ability to highlight causes that might not get much attention from established charities

When asked about potential attributes that might describe crowdfunding platforms, users respond especially strongly to the notion that these services foster personal connections between donors and causes, and offer a space to highlight businesses or projects that are not widely known. Fully 87% of crowdfunding donors believe that these platforms help contributors feel more connected to the projects they support (just 5% think this is not the case), while 84% believe that these platforms are a good way to highlight causes that might not get much attention otherwise (4% do not think this describes crowdfunding well). And around three-quarters of users (77%) believe that crowdfunding is a simpler way to raise money than applying for a loan or grant.

Donors say crowdfunding helps create personal connections, highlight causes

% of U.S. crowdfunding donors who feel that the following statements describes these services well, or not



Source: Survey conducted Nov. 24-Dec. 21, 2015.
"Shared, Collaborative and On Demand: The New Digital Economy"

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In terms of negative perceptions, a slight majority of users (56%) believe that crowdfunding platforms contain a lot of frivolous projects. At the same time, most users don't think these services take attention away from more-deserving charities – just 11% of users believe that this statement describes crowdfunding services well, while 68% feel it does not describe them well.

Users' views on the merits of crowdfunding show relatively little variation based on the demographic characteristics of donors, although there are some differences in the attitudes of younger and older donors. Compared with older users, crowdfunding donors under the age of 50 are more likely to feel that these services contain lots of frivolous projects (60% vs. 46%), but also to feel that they are a simpler way to raise money than applying for a grant or loan (80% vs. 70%).

By the same token, crowdfunding users tend to have similar views about these services regardless of the quantity or level of their donations. However, users who have donated more than \$100 to an individual project are especially likely to indicate that these services are a good way to highlight lesser-known causes or businesses – 94% of these donors believe this statement describes these services well.

3% of American adults have created their own online fundraising project

The share of Americans who created a fundraising project of their own using a crowdfunding platform is relatively small, with 3% saying they have done so. Many of these project creators are themselves donors to other projects; fully 72% of these project creators have made their own contributions to other people’s projects (looked at a different way, 10% of crowdfunding donors have also created a project of their own).

Creating one’s own online fundraising project is a relatively rare occurrence across a range of demographic groups, but certain groups are a bit more likely to do so than others. In particular, some 6% of women ages 18-49 have created their own online fundraising project, compared with 3% of similarly aged men and just 1% of Americans ages 50 and older (regardless of gender).

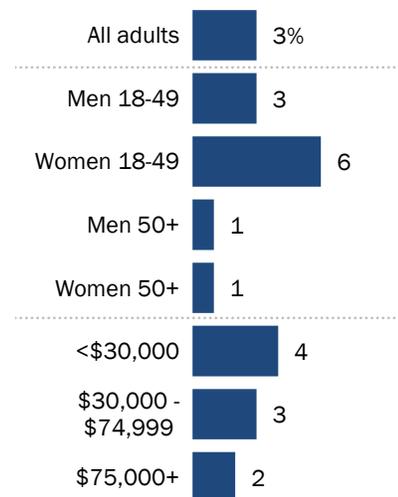
‘In their own words’ responses from project creators

In addition to asking whether they had created a project of their own, the survey also asked respondents to describe a specific project they had created, including the goals of the project and whether or not they reached their monetary objective. A selection of their responses is included below.

Many responses mentioned starting a project in order to pay for medical, veterinary or other personal expenses (either for themselves or for someone else). In a number of instances these projects were designed to appeal to a relatively small group of friends and family, rather than to a wider audience:

Younger women more likely to create online fundraising projects

% who have created their own online fundraising project on a website like Kickstarter or GoFundMe



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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“I have to see a specialist in Florida from Maryland. There were expensive tests that I had to pay out of pocket, traveling expenses and 10 days hotel costs. Yes, I met my goal. Support was mostly from family & friends.”

“I held a fundraiser for a friend who was diagnosed with stage 4 cancer. We raised over \$5,000 in one month. We exceeded our goal.”

“I’m a teacher and used GoFundMe to get updated technology (Chromebooks) for my classroom. I met the goal relatively quickly through donations by parents and other community members.”

“Found a stray puppy with a broken hip that needed surgery. The goal was to raise enough money to get the puppy the surgery. And yes thankfully raised enough money, I got the puppy the surgery and found her a wonderful home to live in!”

“To raise money to help my mother in law pay for a seeing-eye dog. We met the goal.”

“A good friend had just gotten engaged and was moving to live with his fiancée. He couldn't afford to go on our annual guy's boat trip so we all chipped in via GoFundMe to pay for his trip and make it his bachelor party.”

“I created a profile on GoFundMe today to help me pay for a trip around Europe this upcoming December. I don't have enough to pay for all of my hostels and thought I could give this a try.”

“To help my family get a vehicle because ours died and we need one for my son who has autism and other medical problems. No we did not meet our goal.”

Others were more professional or quasi-professional in nature:

“My band raised money to record an album, with varying rewards for donors. We did meet our goal, and it was great!”

“My husband and I run a recording studio. We have done two Kickstarters to raise money for artists to record albums. First was [\$5,000] and was not successful. The second was [\$8,000] and was successful. It is dependent on how much effort the artist invests in the project as well as the size and activity of their social circles.”

“I’ve run several projects. Each was a short-run collection of memorabilia of interest to fans of H.P. Lovecraft. All three projects met their funding goals.”

“I did it twice; once to help a small restaurant get money for flood repairs, and once to help my daughter raise enough money to go to Disneyland with her school choir. We met the goal for my daughter, but not the goal for the restaurant.”

“I work in nonprofit development and marketing. It was for a few clients of mine and it took about 30 minutes to enter all of the content. The goals were between \$1,000 - \$10,000. Some were met and others were not for a variety of reasons.”

“It was to benefit feminist conference organized by a volunteer collective. We raised several thousand dollars. It was successful.”

“To fund a business startup idea based out of a college project. We were fully funded and ran the business for the semester.”

Some noted that even though they didn’t meet their initial goal, they still thought of the experience as a positive one:

“I am a foster parent and was raising money for a larger vehicle to support our family. I did not meet the goal, but did get quite a bit of money. Around \$3,000.”

“I raised \$5,000 for the earthquake victims of Nepal. No, I did not reach my goal but was able to provide money to five different ministries including an orphanage.”

“The goal was to fund a summer intensive for my daughter. It was a good way to get exposure but for the most part it was family who contributed and we didn’t completely meet our goal. We came close enough though and did much better than when we held fundraisers locally where there was a lot of labor and expense going in with a less than stellar payoff. If I were to do it again, I think I’d want to not just ask for money but have the ability to give something back to the donors for helping us (some kind of reciprocity) ... it may have created happier donors and made me feel like I did something tangible to say thank you.”

But others expressed resignation at their failure to reach even relatively modest goals:

“I wanted help getting down to CA to be with my dog when she passed away but I had no means to get there myself. My goal was only \$375 but I did not get a single donation. Therefore I did not reach my goal.”

“My grandfather passed away, I needed help with funeral. I didn't earn a dime. This was a waste of my time and hope.”

“My sister died and we didn't have enough money for a grave plot and headstone near my mom and grandparents at forest lawn but I didn't get any contributors.”

“Needed money for a used car. Started a GoFundMe account. People made fun of me on GoFundMe. I had to wait months to save money like most people do. I did not get any money.”

5. Other shared and on-demand services

In addition to asking a series of in-depth questions about home-sharing services, ride-hailing apps and crowdfunding sites, the survey also measured how many Americans have used a number of other shared and on-demand services. This chapter of the report examines the usage and demographics of these other commercial online platforms.

Several of these services are relatively common, if far from universal. In general, services in this category are those that have been in existence for a number of years, as well as those that are widely available regardless of geographic location:

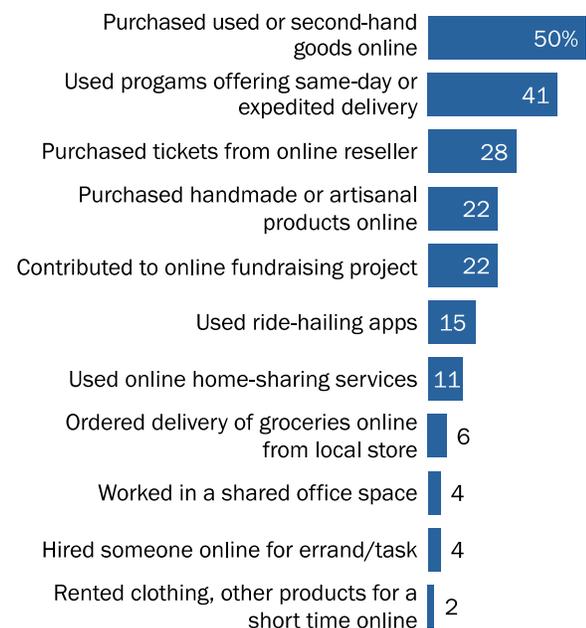
- 50% of Americans have purchased used or second-hand goods online (examples include sites like eBay or Craigslist).
- 41% have used programs that offer same-day or expedited delivery of items they purchased online (examples include services such as Amazon Prime or Google Express).
- 28% have purchased tickets to a sporting or entertainment event from an online ticket reseller (examples include StubHub or SeatGeek).
- 22% have purchased handmade or artisanal products online (examples include sites like Etsy).

On the other hand, several of these services are used by a relatively small minority of Americans. Often these services are new entrants to the market, or those whose availability is more geographically constrained than those listed above:

- 6% of Americans have ordered groceries online from a local store and had them delivered to their home (examples include services like Instacart, Peapod or Fresh Direct).
- 4% have worked in a shared office space that people can reserve for a short period of time.

72% of Americans have used some type of shared or on-demand online service

% of adults who have ...



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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- 4% have hired someone online to do a task or errand (examples include services such as TaskRabbit, Fiverr or Amazon Mechanical Turk).
- 2% have rented clothing or other products for a short period of time online (examples include sites like Rent the Runway).

As noted in previous chapters of this report, 22% of Americans have contributed to an online fundraising project on a site like Kickstarter or GoFundMe; 15% have used ride-hailing apps like Uber or Lyft; and 11% have used online home-sharing services such as Airbnb or HomeAway.

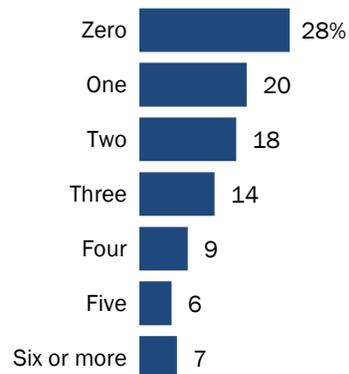
Exposure to the shared and on-demand economy varies greatly within the population: 21% of Americans have used four or more of these services, but 28% have not used any of them

Taken together, roughly three-quarters (72%) of American adults have used at least one of these 11 digital commerce platforms. But although a substantial majority of Americans have at least some connection with the shared and on-demand economy, the extent to which they incorporate these services into their daily lives varies widely across the population.

At one end of the spectrum, roughly half of the public has only modest (if any) exposure to the shared or on-demand economy. Some 28% of Americans have not used any of these services, and 20% have used just one of them (the typical – median – American reports using just two of these 11 services). At the same time, around one-in-five Americans (21%) have used four or more of these 11 services, with 7% indicating that they have used six or more.

28% of Americans have not used any shared or on-demand online service

% of adults who have used the following number of shared and on-demand services (total of 11)



Source: Survey conducted Nov. 24-Dec. 21, 2015.

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College graduates, those with high household incomes, and those under the age of 45 are especially likely to incorporate shared and on-demand services into their lives

The extent to which Americans incorporate shared and on-demand services into their daily lives varies across a number of factors, but certain groups tend to incorporate a relatively broad range of these services into their lives:

College graduates – 39% of college graduates have used four or more of these services, compared with just 8% of those with a high school degree or less. At the same time, roughly one-quarter of college graduates (27%) have used none (11%) or only one (15%) of these services.

Those with relatively high household incomes – 41% of Americans with an annual household income of \$100,000 or more have used four or more of these services, three times the proportion among those from households earning less than \$30,000 annually (13%).

Those under the age of 45 – Exposure to these shared and on-demand services begins to drop off rapidly starting at around age 45. Around one-third of those ages 18-44 have used four or more of these services, and relatively few members of these younger age cohorts have no exposure to these services at all. By contrast, 44% of Americans ages 50 and older (and 56% of those 65 and older) have not used any of these 11 platforms.

A number of the services discussed in this survey are primarily offered in and around major population centers; accordingly, usage of these services by rural residents tends to be relatively low. Just 12% of rural residents have used four or more of these services, roughly half the rate for those in urban (25%) and suburban (22%) areas.

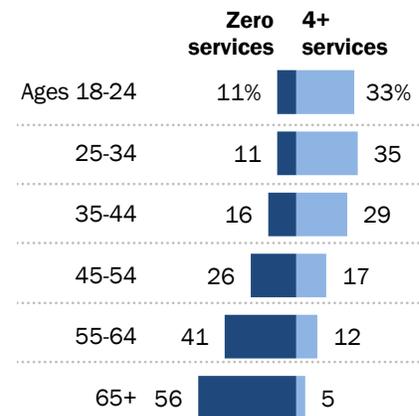
Usage matrix: Online grocery delivery, shared office spaces and online task marketplaces represent the leading edge of shared and on-demand services

As is true of [social media platforms](#), these shared, collaborative and on-demand services have a significant amount of user overlap. And in much the same way that the [vast majority of Twitter and Instagram users also use Facebook](#), certain shared and on-demand services are widely popular among users of various other services. In particular, a substantial majority of shared and on-demand service users indicate that they have purchased used or second-hand goods online, and used same-day or expedited delivery services for their online purchases.

But while some services are widely popular among users of many other different types of services, others tend to cluster together. In other words, these services have a great deal of reciprocity with

Older U.S. adults have little exposure to shared and on-demand services

% in each group who have used the following number of shared and on-demand services (total of 11 measured)



Source: Survey conducted November 24-December 21, 2015

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each other, but not necessarily with the other services. Four services in particular stand out as the “leading edge” applications of the shared and on-demand economy: online grocery delivery services, shared or “co-located” office spaces, online task marketplaces, and short-term clothing or product rental platforms.

Each of these four services is relatively rare within the population as a whole, but vastly more common among Americans who use one or more of these other four services. For instance, among the public as a whole just 6% of Americans have used online grocery delivery services, while 4% have worked in a short-term shared office space and just 2% have rented clothing or other products for a short period of time online. But among the small subset of Americans who have hired someone online to do a task or household errand for them, 40% have used online grocery delivery services (nearly seven times the figure for the general population); 34% have used a short-term shared office space (roughly eight times the figure for Americans as a whole); and 24% have used short-term product rental services (12 times the rate for the general public). All of these four services have a similar level of mutual “reciprocity” when compared with the others.

Shared and on-demand services usage matrix

% of U.S. users in each row who use the services listed in each column (i.e., 55% of Americans who buy used or second-hand goods online have also used services that offer same-day or expedited delivery of items they purchase online)

	Buy used or second-hand goods online	Use expedited delivery services	Use online ticket resellers	Buy handmade products online	Contribute to online fundraising projects	Use ride-hailing apps	Use home-sharing sites	Use online grocery delivery	Use shared office space	Use online task marketplaces	Use online clothing or product rental
% of all adults who ...	50%	41%	28%	22%	22%	15%	11%	6%	4%	4%	2%
% of those who buy used or second-hand goods online who...	N/A	55	39	35	31	21	16	8	5	6	3
% of those who use expedited delivery services who...	67	N/A	45	36	35	25	18	11	7	8	4
% of those who use online ticket reseller markets who...	69	64	N/A	39	37	32	21	12	8	9	5
% of those who buy handmade or artisanal products online who...	79	66	49	N/A	45	30	23	14	8	9	5
% of those who contribute to online fundraising projects who...	71	65	48	46	N/A	28	23	11	8	9	4
% of those who use ride-hailing apps who...	69	67	59	44	40	N/A	30	17	11	12	6
% of those who use home-sharing sites who...	71	63	53	45	45	40	N/A	18	8	10	7
% of those who use online grocery delivery services who...	69	78	62	56	45	47	36	N/A	25	31	21
% of those who use shared office spaces who...	59	67	54	38	42	39	22	32	N/A	34	21
% of those who use online task marketplaces who...	68	74	63	47	48	43	26	40	34	N/A	24

Note: Sample size for those who have used online clothing or product rental sites (n=85) is too small to report as a standalone group.

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Demographic details: Buying used or second-hand goods online

Half (50%) of U.S. adults say they have bought used or second-hand goods on websites like eBay or Craigslist. As with many tech-related products and activities, usage of these sites varies by age. Americans under the age of 50 are roughly twice as likely as those 50 and older to buy second-hand products online (63% vs. 34%). This behavior is also comparatively uncommon among blacks, those who have not attended college and those with relatively low household incomes.

On the other hand, rural residents are just as likely as those living in urban or suburban areas to report buying second-hand goods online.

Nearly two-thirds of U.S. adults under age 50 have bought used items online

% in each group who ever buy used or second-hand goods on websites like eBay or Craigslist

U.S. adults	50%
Men	52
Women	48
White	53
Black	36
Hispanic	48
18-29	64
30-49	62
50-64	42
65+	23
HS grad or less	37
Some college	57
College grad	61
<\$30,000	36
\$30,000-\$74,999	56
\$75,000+	61
Urban	51
Suburban	50
Rural	46

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Demographic details: Expedited and same-day shipping programs

Some 41% of Americans say they have used services that offer same-day or expedited delivery for their online purchases. As with many of these services, use of these services is highest among younger adults, college graduates and those with relatively high household incomes. For example, 57% of those with college degrees have used these types of services, compared with 26% of those with a high school diploma or less.

Roughly four-in-ten Americans use speedy delivery programs for their online purchases

% in each group who ever use programs that offer same-day or expedited delivery of items purchased online, like Amazon Prime or Google Express

U.S. adults	41%
Men	43
Women	39
White	41
Black	33
Hispanic	39
18-29	56
30-49	51
50-64	30
65+	20
HS grad or less	26
Some college	45
College grad	57
<\$30,000	31
\$30,000-\$74,999	39
\$75,000+	55
Urban	43
Suburban	41
Rural	34

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Demographic details: Online ticket resellers

Some 28% of U.S. adults report they have purchased a ticket to a sporting or entertainment event from an online ticket reseller like StubHub or SeatGeek. This activity is fairly strongly correlated with household income and educational attainment: 44% of those living in households earning \$75,000 or more a year and 44% of college graduates have purchased tickets via an online ticket reseller, but only 17% of adults from households earning less than \$30,000 annually and 15% of those without college experience have done so.

Along with age and socio-economic status, this behavior is more common among those under the age of 50 than among older adults; more common among whites than among blacks or Hispanics; and slightly more common among men than among women.

Buying from online ticket resellers varies greatly by income and education

% in each group who ever purchase tickets to a sporting or entertainment event from a ticket reseller like StubHub or SeatGeek

U.S. adults	28%
Men	31
Women	26
White	31
Black	19
Hispanic	24
18-29	38
30-49	36
50-64	23
65+	11
HS grad or less	15
Some college	32
College grad	44
<\$30,000	17
\$30,000-\$74,999	28
\$75,000+	44
Urban	29
Suburban	31
Rural	20

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Demographic details: Purchasing handmade or artisanal goods online

Websites like Etsy serve as a virtual marketplace, allowing entrepreneurs and consumers to sell and buy hand-crafted goods that were once reserved for “real-world” markets and trade shows.

Some 22% of Americans have bought hand-crafted or artisanal products online, and this behavior is especially common among younger adults (especially those under the age of 50), college graduates and those with relatively high household incomes.

In contrast to many of the services discussed in this report, women are substantially more likely than men to engage in this behavior: Some 29% of women have purchased hand-crafted goods online, nearly double the figure for men (15%).

Women are twice as likely as men to purchase handmade goods online

% in each group who ever buy handmade or artisanal products on websites like Etsy

U.S. adults	22%
Men	15
Women	29
White	25
Black	10
Hispanic	20
18-29	34
30-49	28
50-64	15
65+	7
HS grad or less	11
Some college	25
College grad	34
<\$30,000	14
\$30,000-\$74,999	23
\$75,000+	33
Urban	24
Suburban	23
Rural	17

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Demographic details: Online grocery delivery services

Just 6% of U.S. adults say that they ever order groceries online from a local store and have them delivered to their home using a service like Instacart, Peapod or FreshDirect.

Like many other facets of the sharing economy, use of these services is most prevalent among younger Americans, college graduates and those with relatively high household incomes.

Much like ride-hailing, online grocery delivery services are more prevalent among urban and suburban residents than those living in rural areas – even across income and education levels. For example, just 2% of rural residents whose annual household income is \$75,000 or more have used these services, compared with 7% of urban residents earning less than \$30,000 a year.

Ordering groceries online less common among rural and older adults

% in each group who ever order groceries online from a local store and have them delivered via service like Instacart, Peapod, FreshDirect

U.S. adults	6%
Men	5
Women	6
White	5
Black	5
Hispanic	5
18-29	9
30-49	7
50-64	3
65+	2
HS grad or less	3
Some college	6
College grad	8
<\$30,000	5
\$30,000-\$74,999	3
\$75,000+	9
Urban	7
Suburban	5
Rural	2

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Demographic details: Task marketplaces

A number of online services (such as TaskRabbit, Fiverr and Amazon’s Mechanical Turk) allow users to outsource a variety of daily tasks, errands and small jobs to independent “gig” workers. At the moment these services are a relatively niche behavior, as just 4% of U.S. adults say they have hired someone online to do a task or errand.

In general, this behavior is relatively rare across a variety of demographic groups. The biggest dividing line pertains to age: Americans under the age of 50 are three times as likely to use task marketplaces as are those ages 50 and older (6% vs. 2%).

4% of Americans have hired someone online to do task, household errand

% in each group who ever hire someone online to do a task or household errand, using a service like TaskRabbit, Fiverr or Amazon Mechanical Turk

U.S. adults	4%
Men	5
Women	4
White	4
Black	4
Hispanic	5
18-29	7
30-49	6
50-64	2
65+	2
HS grad or less	4
Some college	5
College grad	5
<\$30,000	5
\$30,000-\$74,999	3
\$75,000+	4
Urban	5
Suburban	4
Rural	3

Source: Survey conducted Nov. 24-Dec. 21, 2015.

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Demographic details: Shared or co-located office spaces

For freelancers and other workers who have the ability to work anywhere thanks to digital technology, so-called [co-working spaces](#) can provide a home base or connection with a broader community of workers. Overall, 4% of Americans have ever worked in a shared office space where people can pay to use an office or work area for a period of time. Although a relatively niche behavior for most demographic groups, Americans under the age of 50 are significantly more likely to have done this than those ages 50 and older (7% vs. 2%).

4% of Americans have worked in a short-term shared office space

% in each group who ever work in a shared office space where anyone can pay to use an office or work area for a short period of time

U.S. adults	4%
Men	4
Women	4
White	3
Black	7
Hispanic	5
18-29	7
30-49	6
50-64	2
65+	1
HS grad or less	3
Some college	5
College grad	5
<\$30,000	6
\$30,000-\$74,999	3
\$75,000+	4
Urban	5
Suburban	4
Rural	3

Source: Survey conducted Nov. 24-Dec. 21, 2015.

“Shared, Collaborative and On Demand: The New Digital Economy”

PEW RESEARCH CENTER

Demographic details: Online clothing/product rental

Just 2% of U.S. adults say they have rented clothing or other products from an online service like Rent the Runway. Younger adults are more likely to have used this type of service than older adults: 5% of 18- to 29-year-olds say they have done so, compared with fewer than 1% of adults 65 years of age and older. In contrast to most of these services, lower-income Americans are more likely than those from higher income brackets to use these services. Still, a vast majority of all major demographic groups have not used an online rental services for clothing items.

2% of Americans have rented clothing or other product online

% in each group who ever rent clothing or other products for a period of time using a site like Rent the Runway

U.S. adults	2%
Men	2
Women	3
White	1
Black	3
Hispanic	2
18-29	5
30-49	3
50-64	1
65+	<1
HS grad or less	3
Some college	2
College grad	2
<\$30,000	4
\$30,000-\$74,999	1
\$75,000+	2
Urban	3
Suburban	2
Rural	2

Source: Survey conducted Nov. 24-Dec. 21, 2015.

"Shared, Collaborative and On Demand: The New Digital Economy"

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Methodology

The American Trends Panel (ATP), created by Pew Research Center, is a nationally representative panel of randomly selected U.S. adults living in households. Respondents who self-identify as internet users and who provided an email address participate in the panel via monthly self-administered web surveys, and those who do not use the internet or decline to provide an email address participate via the mail. The panel is being managed by Abt SRBI.

Data in this report are drawn from the December wave of the panel, conducted Nov. 24-Dec. 21, 2015, among 4,787 respondents (4,317 by web and 470 by mail). The margin of sampling error for the full sample of 4,787 respondents is plus or minus 1.94 percentage points.

Members of the American Trends Panel were recruited from two large, national landline and cellphone random-digit-dial (RDD) surveys conducted in English and Spanish. At the end of each survey, respondents were invited to join the panel. The first group of panelists was recruited from the 2014 Political Polarization and Typology Survey, conducted Jan. 23 to March 16, 2014. Of the 10,013 adults interviewed, 9,809 were invited to take part in the panel and a total of 5,338 agreed to participate.⁹ The second group of panelists was recruited from the 2015 Survey on Government, conducted Aug. 27 to Oct. 4, 2015. Of the 6,004 adults interviewed, all were invited to join the panel and 2,976 agreed to participate.¹⁰

Participating panelists provided either a mailing address or an email address to which a welcome packet, a monetary incentive and future survey invitations could be sent. Panelists also receive a small monetary incentive after participating in each wave of the survey.

The ATP data were weighted in a multistep process that begins with a base weight incorporating the respondents' original survey selection probability and the fact that in 2014 some panelists were subsampled for invitation to the panel. Next, an adjustment was made for the fact that the propensity to join the panel and remain an active panelist varied across different groups in the sample. The final step in the weighting uses an iterative technique that matches gender, age, education, race, Hispanic origin and region to parameters from the U.S. Census Bureau's 2013 American Community Survey. Population density is weighted to match the 2010 U.S. Decennial Census. Telephone service is weighted to estimates of telephone coverage for 2015 that were

⁹ When data collection for the 2014 Political Polarization and Typology Survey began, non-internet users were subsampled at a rate of 25%, but a decision was made shortly thereafter to invite all non-internet users to join. In total, 83% of non-internet users were invited to join the panel.

¹⁰ Respondents to the 2014 Political Polarization and Typology Survey who indicated that they are internet users but refused to provide an email address were initially permitted to participate in the American Trends Panel by mail, but were no longer permitted to join the panel after Feb. 6, 2014. Internet users from the 2015 Survey on Government who refused to provide an email address were not permitted to join the panel.

projected from the July-December 2014 National Health Interview Survey. It also adjusts for party affiliation using an average of the three most recent Pew Research Center general public telephone surveys, and for internet use using as a parameter a measure from the 2014 Survey of Political Polarization. Sampling errors and statistical tests of significance take into account the effect of weighting. Interviews are conducted in both English and Spanish, but the Hispanic sample in the American Trends Panel is predominantly native born and English speaking.

The following table shows the unweighted sample sizes and the error attributable to sampling that would be expected at the 95% level of confidence for different groups in the survey:

Group	Unweighted sample size	Plus or minus ...
Total sample	4,787	1.9 percentage points
Ride-hailing users	828	4.7 percentage points
Daily/weekly users	112	12.7 percentage points
Home-sharing users	734	5.0 percentage points
Crowdfunding users	1,215	3.9 percentage points
Men	2,361	2.8 percentage points
Women	2,426	2.7 percentage points
18-29	671	5.2 percentage points
30-49	1,331	3.7 percentage points
50-64	1,530	3.4 percentage points
65+	1,249	3.8 percentage points
College grad+	2,369	2.8 percentage points
Some college	1,553	3.4 percentage points
High school grad or less	865	4.6 percentage points

Sample sizes and sampling errors for other subgroups are available upon request.

In addition to sampling error, one should bear in mind that question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of opinion polls.

The web component of the December wave had a response rate of 68.4% (4,317 responses among 6,308 web-based individuals in the panel); the mail component had a response rate of 66% (417

responses among 712 non-web individuals in the panel). Taking account of the combined, weighted response rate for the recruitment surveys (10.0%) and attrition from panel members who were removed at their request or for inactivity, the cumulative response rate for the December ATP wave is 3%.¹¹

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¹¹ Approximately once per year, panelists who have not participated in multiple consecutive waves are removed from the panel. These cases are counted in the denominator of cumulative response rates.

Topline questionnaire

ASK ALL:

TRANS_FREQ. How frequently, if ever, do you...

a. Drive a car

Dec 1-Dec 21

2015

N=4,787

75	Daily or almost daily
9	Weekly
5	Monthly or less often
10	Never
1	No Answer

b. Take public transportation (like a bus, subway, or train)

Dec 1-Dec 21

2015

N=4,787

7	Daily or almost daily
4	Weekly
24	Monthly or less often
65	Never
1	No Answer

TRANS_FREQ Continued...

c. Walk or ride a bike somewhere (not including for exercise)

Dec 1-Dec 21

2015

N=4,787

19	Daily or almost daily
14	Weekly
24	Monthly or less often
42	Never
1	No Answer

d. Take a taxi that you requested over the phone or hailed on the street

Dec 1-Dec 21

2015

N=4,787

*	Daily or almost daily
3	Weekly
18	Monthly or less often
77	Never
1	No Answer

e. *Travel overnight away from home (either for work or personal reasons)*

Dec 1-Dec 21

2015

N=4,787

2	Daily or almost daily
6	Weekly
62	Monthly or less often
30	Never
1	No Answer

ASK ALL:

OWNCAR.

Do you currently own or lease a car, truck, or motorcycle? (Please include any vehicle you own personally, as well as those you share with another member of your household)

Dec 1-Dec 21

2015

N=4,787

77	Yes
22	No
1	No Answer

ASK ALL:

TRANS_SHARE Do you ever use any of the following things?

		<u>Yes</u>	<u>No/ No answer</u>
a.	A bike-sharing service Dec 1-Dec 21, 2015 [N=4,787]	3	97
b.	A car-sharing service like ZipCar or Car2Go Dec 1-Dec 21, 2015 [N=4,787]	3	97

ASK ALL:

AWARE_SHARE

Have you heard of the following terms? [**Randomize**]

		<u>Yes</u>	<u>No/ No answer</u>
a.	Sharing economy Dec 1-Dec 21, 2015 [N=4,787]	27	73
b.	"Gig" economy Dec 1-Dec 21, 2015 [N=4,787]	11	89
c.	Crowdfunding Dec 1-Dec 21, 2015 [N=4,787]	39	61

ASK IF ONLINE SHOPPER (SHOP1a=1 OR SHOP1b=1 OR SHOP1c=1):

SHOP2. Do you ever...

a. Buy used or second-hand goods on websites like Ebay or Craigslist

Dec 1-Dec 21

2015

N=4,178

63	Yes
37	No
*	No Answer

b. Buy handmade or artisanal products on websites like Etsy

Dec 1-Dec 21

2015

N=4,178

28	Yes
72	No
*	No Answer

ASK ALL:

SHAREECON_USE. Do you ever do any of the following things? [RANDOMIZE]

	<u>Yes</u>	<u>No/ No answer</u>
a. Work in a shared office space where anyone can pay to use an office or work area for a short period of time Dec 1-Dec 21, 2015 [N=4,787]	4	96
b. Order groceries online from a local store and have them delivered to you using a service like Instacart, Peapod, or Fresh Direct Dec 1-Dec 21, 2015 [N=4,787]	6	94
c. Hire someone online to do a task or household errand, using a service like TaskRabbit, Fiverr, or Amazon Mechanical Turk Dec 1-Dec 21, 2015 [N=4,787]	4	96
d. Rent clothing or other products for a period of time using a site like Rent the Runway Dec 1-Dec 21, 2015 [N=4,787]	2	98
e. Purchase a ticket to a sporting or entertainment event from a ticket reseller like StubHub or SeatGeek Dec 1-Dec 21, 2015 [N=4,787]	28	72
f. Use programs that offer same-day or expedited delivery of items you purchase online, like Amazon Prime or Google Express Dec 1-Dec 21, 2015 [N=4,787]	41	59

ASK ALL:

CAR1. Do you ever use ride-hailing services like Uber or Lyft?

Dec 1-Dec 21

2015

N=4,787

15	Yes, I have done this
51	I have not done this, but I have heard of it
33	I have never heard of this before
1	No Answer

ASK IF USE OR HAVE HEARD OF RIDE-HAILING SERVICES (CAR1=1-2):

CAR3. As far as you know, are ride-hailing services like Uber or Lyft available where you live?

Dec 1-Dec 21

2015

N=3,623

60	Yes
16	No
23	Not sure
*	No Answer

ASK IF USE OR HAVE HEARD OF RIDE-HAILING SERVICES (CAR1=1-2):

CAR4. Have you ever ridden with someone you know using a ride-hailing service like Uber or Lyft, even if you did not request the ride yourself?

Dec 1-Dec 21

2015

N=3,623

23	Yes
77	No
1	No Answer

ASK IF USE OR HAVE HEARD OF RIDE-HAILING SERVICES (CAR1=1-2):

CAR5. Thinking about ride-hailing services such as Uber or Lyft, do you think the following statements describe them well? **[RANDOMIZE]**

	<u>Yes</u>	<u>No</u>	<u>Not sure/ No answer</u>
a. Are less expensive than taking a taxi Dec 1-Dec 21, 2015 [N=3,623]	38	8	55
b. Are a good option for people who have trouble getting taxis to pick them up because of their race or appearance Dec 1-Dec 21, 2015 [N=3,623]	38	11	51
c. Use drivers who you would feel safe riding with Dec 1-Dec 21, 2015 [N=3,623]	34	8	58
d. Save their users time and stress Dec 1-Dec 21, 2015 [N=3,623]	54	5	41
e. Are more reliable than taking a taxi or public transportation Dec 1-Dec 21, 2015 [N=3,623]	30	14	56
f. Provide good jobs for people who want flexible working hours Dec 1-Dec 21, 2015 [N=3,623]	63	6	31
g. Serve neighborhoods that taxis won't visit Dec 1-Dec 21, 2015 [N=3,623]	37	7	56
h. Are mostly used by people who already have plenty of ways to get around Dec 1-Dec 21, 2015 [N=3,623]	25	18	58
i. Collect too much personal information about their users Dec 1-Dec 21, 2015 [N=3,623]	9	21	70
j. Are a good option for older adults who have a hard time getting around on their own Dec 1-Dec 21, 2015 [N=3,623]	56	7	37
k. Are a good way for parents to make sure their children get around safely when they can't drive them Dec 1-Dec 21, 2015 [N=3,623]	21	28	51

ASK IF USE OR HAVE HEARD OF RIDE-HAILING SERVICES (CAR1=1-2):

CAR6. Have you heard of other people having...

a. GOOD experiences using these services

Dec 1-Dec 21

2015

N=3,623

65	Yes
34	No
1	No Answer

b. BAD experiences using these services

Dec 1-Dec 21

2015

N=3,623

32	Yes
66	No
2	No Answer

ASK IF USE OR HAVE HEARD OF RIDE-HAILING SERVICES (CAR1=1-2):

CAR7a. Which statement best describes your view of services like Uber or Lyft?

Dec 1-Dec 21

2015

N=3,623

45	They are primarily software companies – their business is connecting drivers with people who are looking for a ride
22	They are primarily transportation companies – they have a lot of control over their drivers and the overall customer experience
33	Not sure
1	No Answer

ASK IF USE OR HAVE HEARD OF RIDE HAILING SERVICES (CAR1=1-2):

CAR7b. Which statement best describes your view of the drivers who work with services like Uber or Lyft?

Dec 1-Dec 21

2015

N=3,623

14	They are employees who work directly for the service or app that allows you to book a ride
57	They are independent contractors who work for themselves and use the service or app to connect to potential customers
28	Not sure
1	No Answer

ASK IF USE OR HAVE HEARD OF RIDE-HAILING SERVICES (CAR1=1-2):

CAR8. How much have you heard about the debate happening in some cities over whether services like Uber and Lyft should be regulated in the same way as existing taxi companies?

Dec 1-Dec 21	
<u>2015</u>	
N=3,623	
22	A lot
50	A little
27	Nothing at all
1	No Answer

ASK IF AWARE OF DEBATE (CAR8=1-2):

CAR9. Some cities are currently debating how to best regulate services like Uber or Lyft. Which statement comes closest to your view on this subject?

Dec 1-Dec 21	
<u>2015</u>	
N=2,872	
35	These services SHOULD be required to follow the same rules and regulations as taxis – it is important that everyone follow the same rules when it comes to things like pricing, insurance, and disability access
42	These services SHOULD NOT be required to follow the same rules and regulations as taxis – it is important to let companies be innovative and meet the needs of their customers, even if that goes against existing regulations
23	I'm not sure
*	No Answer

ASK IF USE RIDE-HAILING SERVICES (CAR1=1):

CAR10. How often do you use ride-hailing services such as Uber or Lyft?

Dec 1-Dec 21	
<u>2015</u>	
N=828	
3	Daily or almost daily
14	Weekly
26	Monthly
56	Less often
1	No answer

ASK IF USE RIDE-HAILING SERVICES (CAR1=1):

CAR11. As a user of these services, who do you think should be responsible for...?

a. Ensuring that drivers are properly trained

Dec 1-Dec 21

2015

N=828

8	Individual drivers
23	The app or service that people use to book rides
68	Both the driver and the app or service
1	No answer

b. Ensuring that the vehicles are clean and safe

Dec 1-Dec 21

2015

N=828

24	Individual drivers
12	The app or service that people use to book rides
62	Both the driver and the app or service
2	No answer

ASK IF USE RIDE-HAILING SERVICES (CAR1=1):

CAR12. Have you, personally, ever had a bad experience using one of these services?

Dec 1-Dec 21

2015

N=828

16	Yes
83	No
1	No answer

ASK IF HAS HAD BAD EXPERIENCE (CAR12=1):

CAR13. Thinking about the most recent time you had a bad experience with these services, did you feel

		<u>Yes</u>	<u>No/ No answer</u>
a.	That your problem was taken seriously Dec 1-Dec 21, 2015 [N=122]	59	41
b.	That you had a clear way to report the problem to people who could help Dec 1-Dec 21, 2015 [N=122]	68	32
c.	That your problem was resolved in a satisfactory way Dec 1-Dec 21, 2015 [N=122]	62	38

ASK ALL:

CF1. Have you ever contributed money to support a fundraising project on a website like Kickstarter or GoFundMe?

Dec 1-Dec 21

2015

N=4,787

22	Yes, I have done this
41	I have not done this, but I have heard of it
36	I have never heard of this before
1	No Answer

ASK IF USES OR IS AWARE OF CROWDFUNDING (CF1=1-2):

CF2. Thinking about websites like Kickstarter or GoFundMe, do you think the following statements describe them well? [RANDOMIZE]

	<u>Yes</u>	<u>No</u>	<u>Not sure/ No answer</u>
a. Take attention away from more deserving charities Dec 1-Dec 21, 2015 [N=3,335]	14	55	31
b. Contain a lot of frivolous projects Dec 1-Dec 21, 2015 [N=3,335]	50	11	39
c. Are a good way to highlight causes or businesses that might not get much attention otherwise Dec 1-Dec 21, 2015 [N=3,335]	72	7	21
d. Are a much simpler way to raise money than applying for a loan or grant Dec 1-Dec 21, 2015 [N=3,335]	66	8	26
e. Help contributors feel more personally connected to the projects they support Dec 1-Dec 21, 2015 [N=3,335]	72	7	21

ASK IF CROWDFUNDING USER (CF1=1):

CF3. How many different projects have you contributed to using these sites?

Dec 1-Dec 21

2015

N=1,215

87	1-5
9	6-10
3	11 or more
*	No Answer

ASK IF CROWDFUNDING USER (CF1=1):

CF4. What is the largest amount of money you have contributed to a single project?

Dec 1-Dec 21

2015

N=1,215

13	\$10 or less
49	\$11 - \$50
21	\$51 - \$100
17	\$101 - \$500
3	More than \$500
*	No Answer

ASK IF CROWDFUNDING USER (CF1=1):

CF5. Which of the following types of projects have you contributed to?

		<u>Yes, have done this</u>	<u>No, have not done this/ No answer</u>
a.	A project to help a person in need (with things like medical or legal bills, or unexpected debt) Dec 1-Dec 21, 2015 [N=1,215]	68	32
b.	A project to fund a new product or invention Dec 1-Dec 21, 2015 [N=1,215]	34	66
c.	A project to fund a new restaurant or other type of business Dec 1-Dec 21, 2015 [N=1,215]	10	90
d.	A project for a musician or other creative artist Dec 1-Dec 21, 2015 [N=1,215]	30	70
f.	A project for a school Dec 1-Dec 21, 2015 [N=1,215]	32	68

ASK IF HAVE HELPED SOMEONE IN NEED (CF5a=1):

CF6. Thinking about the times you have contributed to help someone in need, were any of those people... [Check all that apply]

		<u>Selected</u>	<u>Not selected/ No answer</u>
a.	A close friend or family member Dec 1-Dec 21, 2015 [N=792]	62	38
b.	A friend-of-a-friend or acquaintance Dec 1-Dec 21, 2015 [N=792]	63	37
c.	A public figure Dec 1-Dec 21, 2015 [N=792]	7	93
d.	Someone who was not a public figure, and who you did not know personally Dec 1-Dec 21, 2015 [N=792]	28	72
e.	None of these [EXCLUSIVE PUNCH] Dec 1-Dec 21, 2015 [N=792]	1	99

ASK IF HAVE HELPED SOMEONE IN NEED (CF5a=1):

CF7. Have you ever contributed to a project to help someone in need primarily because you felt pressured to donate by other people?

Dec 1-Dec 21	
<u>2015</u>	
N=792	
14	Yes
85	No
*	No Answer

ASK IF USES OR IS AWARE OF CROWDFUNDING (CF1=1-2):

CF8. Have you ever created your own fundraising project on a website like Kickstarter or GoFundMe?

Dec 1-Dec 21	
<u>2015</u>	
N=3,335	
5	Yes
94	No
1	No Answer

ASK IF HAVE CREATED OWN FUNDRAISING PROJECT (CF8=1):

CF9. Please describe a time that you created a project on one of these sites. What was the goal of the project? Did you eventually meet your goal?

OPEN-END; RESPONSES NOT SHOWN

ASK ALL:

LOD1. Do you ever stay overnight in a private residence that you booked using an online service like AirBnB, VRBO, or HomeAway?

Dec 1-Dec 21
2015
 N=4,787

11	Yes, I have done this
34	I have not done this, but I have heard of it
53	I have never heard of this before
1	No Answer

LOD2 not shown**ASK IF HAVE USED OR HEARD OF HOME SHARING (LOD1=1-2):**

LOD3. Thinking about services such as AirBnB, VRBO, or HomeAway, do you think the following statements describe them well?

		<u>Yes</u>	<u>No</u>	<u>Not sure/ No answer</u>
a.	Are less expensive than a hotel Dec 1-Dec 21, 2015 [N=2,738]	50	8	43
b.	Are located in neighborhoods where it's hard to find hotels Dec 1-Dec 21, 2015 [N=2,738]	32	12	56
c.	Are a good option for families or other people who like to travel as a group Dec 1-Dec 21, 2015 [N=2,738]	56	8	37
d.	Are not always as appealing as they are described online Dec 1-Dec 21, 2015 [N=2,738]	34	10	56
e.	Are risky to use Dec 1-Dec 21, 2015 [N=2,738]	31	24	44
f.	Are best for adventurous travelers Dec 1-Dec 21, 2015 [N=2,738]	55	11	34
g.	Are a good way for homeowners to earn some extra income Dec 1-Dec 21, 2015 [N=2,738]	70	4	25

ASK IF HAVE USED OR HEARD OF HOME SHARING (LOD1=1-2):

LOD4. Have you heard of other people having...

a. GOOD experiences using these services

Dec 1-Dec 21
2015
 N=2,738

62	Yes
37	No
1	No Answer

b. BAD experiences using these services

Dec 1-Dec 21

2015

N=2,738

37	Yes
62	No
2	No Answer

ASK IF HAVE USED OR HEARD OF HOME SHARING (LOD1=1-2):

LOD5. Which statement best describes your view of services like AirBnB or VRBO?

Dec 1-Dec 21

2015

N=2,738

49	They are software companies – their business is connecting people with a spare room or empty home with people who are looking for a place to stay
19	They are hospitality companies – they vouch for the quality of the properties they list and have a lot of control over the customer experience
31	Not sure
1	No Answer

ASK IF HAVE USED OR HEARD OF HOME SHARING (LOD1=1-2):

LOD6. How much have you heard about the debate happening in some cities over whether or not homeowners should be able to legally rent out their homes using services like AirBnB or VRBO?

Dec 1-Dec 21

2015

N=2,738

13	A lot
36	A little
49	Nothing at all
2	No Answer

ASK IF AWARE OF DEBATE (LOD6=1-2):

LOD7. Some cities are currently debating the legality of services like AirBnB and VRBO. Which comes closest to your view on this subject?

Dec 1-Dec 21

2015

N=1,490

30	These services should be legal, but owners should have to pay local hotel and lodging taxes
52	These services should be legal, and owners should NOT have to pay local hotel and lodging taxes
4	It should NOT be legal for people to rent out their homes or apartments on a short-term basis using these services
14	Not sure
1	No Answer

ASK IF HAVE USED HOME SHARING SERVICES (LOD1=1):

LOD8. Have you ever used these services to reserve a single room, or other type of shared space, in someone's home?

Dec 1-Dec 21	
<u>2015</u>	
N=734	
37	Yes
62	No
1	No Answer

ASK IF HAVE STAYED IN SHARED SPACE (LOD8=1):

LOD9. Do you worry about staying in a shared space with someone you have never met before, or is that not something you worry about?

Dec 1-Dec 21	
<u>2015</u>	
N=260	
48	Yes, worry about this
52	No, do not worry about this
*	No Answer

ASK IF HAVE USED HOME SHARING SERVICES (LOD1=1):

LOD10. As a user of these services, who do you think should be responsible for the following things?

a. Making sure properties are described accurately

Dec 1-Dec 21	
<u>2015</u>	
N=734	
23	Homeowners
8	The app or service that people use to book a stay
67	Both the homeowner and the app or service
1	No Answer

b. Addressing problems that might come up during someone's stay

Dec 1-Dec 21	
<u>2015</u>	
N=734	
35	Homeowners
10	The app or service that people use to book a stay
53	Both the homeowner and the app or service
1	No Answer

c. Resolving payment issues between hosts and guests

Dec 1-Dec 21	
<u>2015</u>	
N=734	
11	Homeowners
31	The app or service that people use to book a stay
57	Both the homeowner and the app or service
1	No Answer

ASK IF HAVE USED HOME SHARING SERVICES (LOD1=1):

LOD11. Have you, personally, ever had a bad experience using one of these services?

Dec 1-Dec 21

2015

N=734

12	Yes
86	No
2	No Answer

ASK IF HAS HAD BAD EXPERIENCE (LOD11=1):

LOD12. Thinking about the most recent time you have had a bad experience with these services, did you feel...

		<u>Yes</u>	<u>No/ No answer</u>
a.	That your problem was taken seriously Dec 1-Dec 21, 2015 [N=72]	46	54
b.	That you had a clear way to report the problem to people who could help Dec 1-Dec 21, 2015 [N=72]	65	35
c.	That your problem was resolved in a satisfactory way Dec 1-Dec 21, 2015 [N=72]	67	33

y