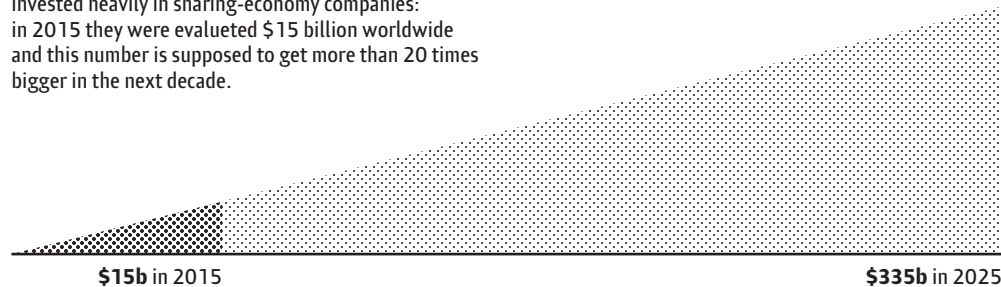


WorkFlow

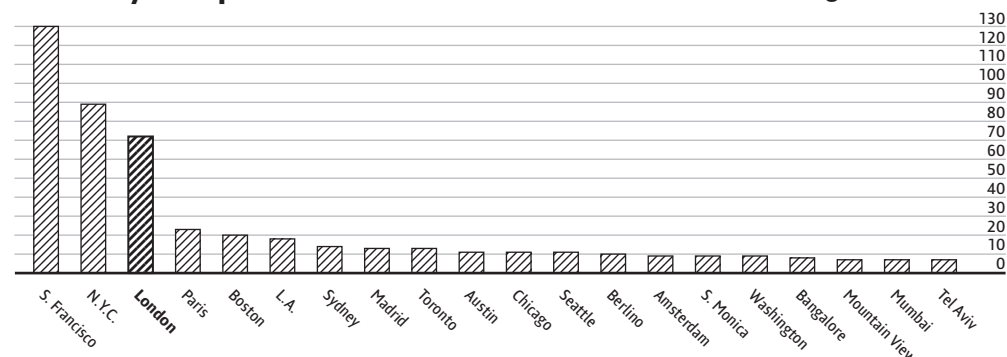
#visualizingthecrisis

Welcome to the Sharing Economy

It's hard to find more exuberant sharing-economy enthusiasts than investors. Venture capitalists have invested heavily in sharing-economy companies: in 2015 they were evaluated \$15 billion worldwide and this number is supposed to get more than 20 times bigger in the next decade.



Ranking of the Top 20 Cities for Number of Sharing Economy Companies



"The UK, and London in particular, is the centre of the sharing economy."
James McClure, Airbnb general manager UK and Ireland

They Call it Uberization

Uber has more than 42,000 London drivers

Dogvacay connects pet owners with over 20,000 pet sitters

Millennials are putting off ownership in favor of renting and leasing.

Airbnb in London

25,361 Hosts
£101 average price per night
£746 average income per month

416 shared room
11,614 private room
13,331 entire home/apartment
28% central properties
72% non-central properties

Airbnb in 2013 had £502m impact in UK economy

"Airbnb is a force for good in the UK economy – McClure said – It promotes the UK as a destination and spreads tourist spend to local business."

Average Incomes per Month

Capital Platforms

+ \$314

Labour Platforms

+ \$533

While in the US...

Take a Ride in Bangkok

Uber has just launch UberMOTO in Thailand, where 87% of households own a motorcycle or a scooter.

Driver-Partners Spend Uber Income on...

- A Monthly bills
- B Car payments
- C House payments
- D Treats for themselves/family
- E Expenses for their children
- F Saving for emergencies
- G Paying medical bills
- H Student loan
- I Saving for retirement
- J Saving for a big purchase

Who They Are

- K 12% New Regulars: no previous providing experience and now driving UberX (> 30 hrs/week)
- L 18% The Pros: currently driver UberBLACK
- M 18% Crossovers: UberX driver-partners who previously drove taxis or black cars
- N 52% Part-Timers: no previous providing experience and now driving UberX (< 30 hrs/week)

What They Do

- O 2% Stay-at-home parent
- P 3% Retired
- Q 7% Students
- R 8% Unemployed
- S 10% Working multiple jobs, at least 1 full-time
- T 26% Working 1 or more part-time jobs
- U 44% Working 1 full-time job

“Share-the-Scraps Economy”: the Dark Side of Collaborative Consumption

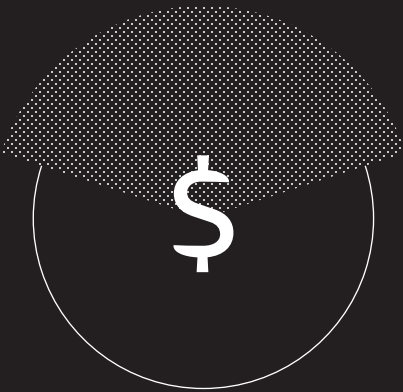


“Uber drivers use their own cars, take out their own insurance, work as many hours as they want or can – and pay Uber a fat percent. Worker safety? Social Security? Uber says it's not the employer so it's not responsible.”
Robert Reich, Chancellor's Professor at the University of California at Berkeley

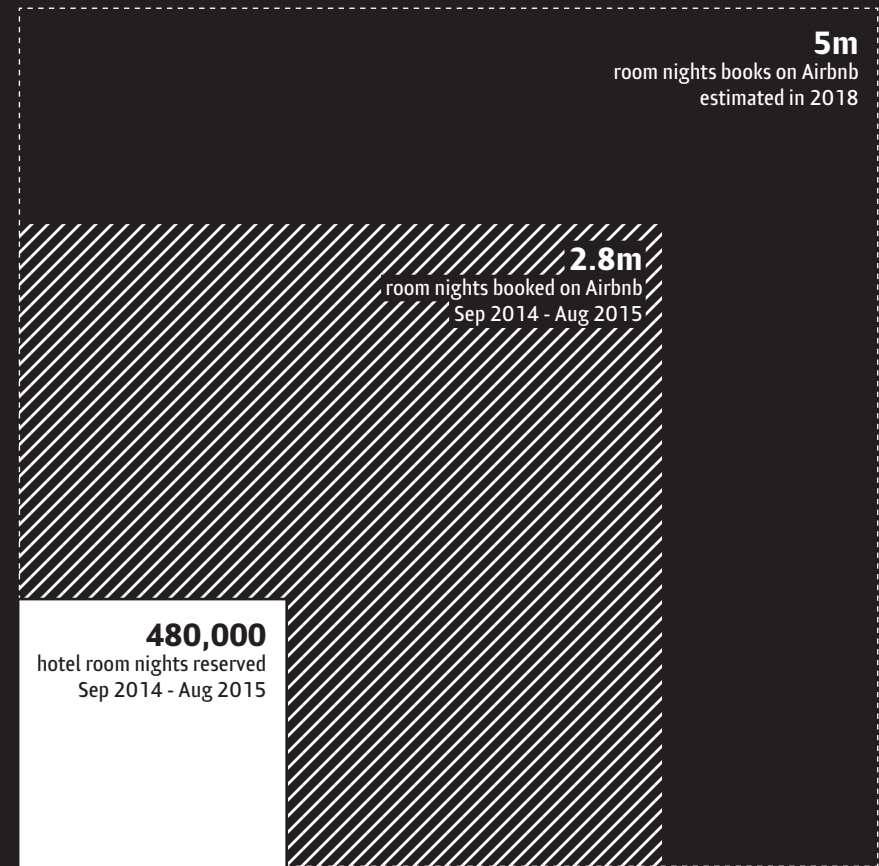
Hosts operating an unregulated full-time business account for 30% of the total revenue on Airbnb. Hosts renting out two or more units account for 40% of the total revenue on Airbnb.



Airbnb
revenues

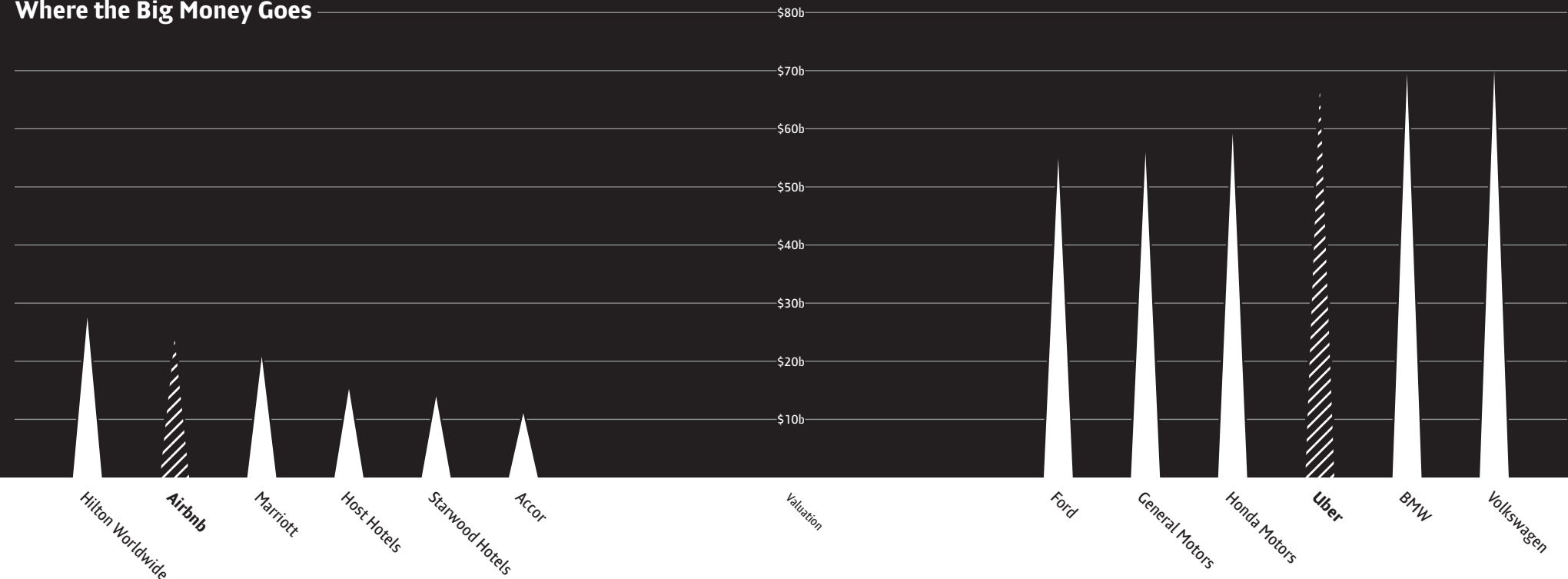


The Impact of Airbnb on Hotel and Hospitality Industry



HVS Consulting estimated that hotels lose approximately \$450 million in direct revenues and over 2,800 jobs per year to Airbnb.

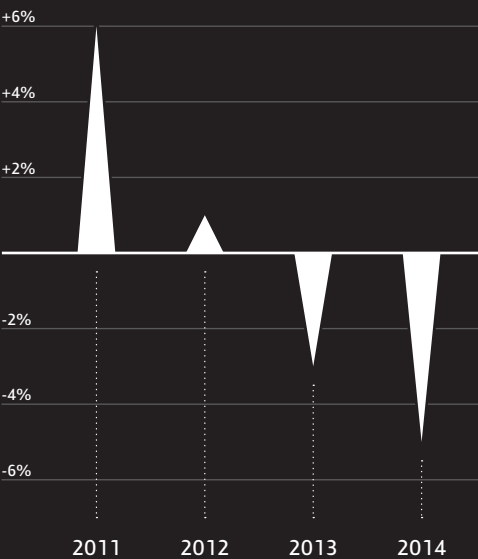
Where the Big Money Goes



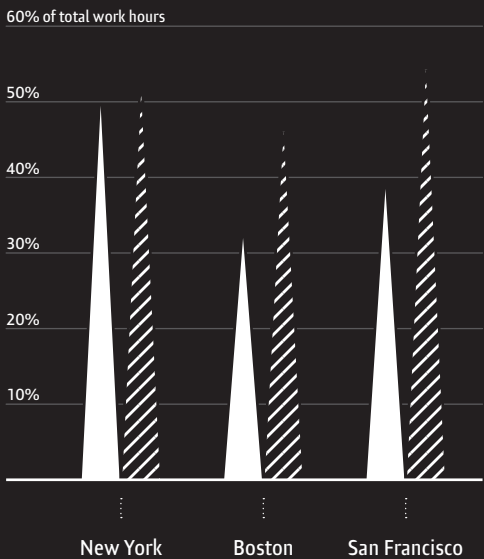
Impressum

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Annual percentage change in the number of New York City Taxi Trips.

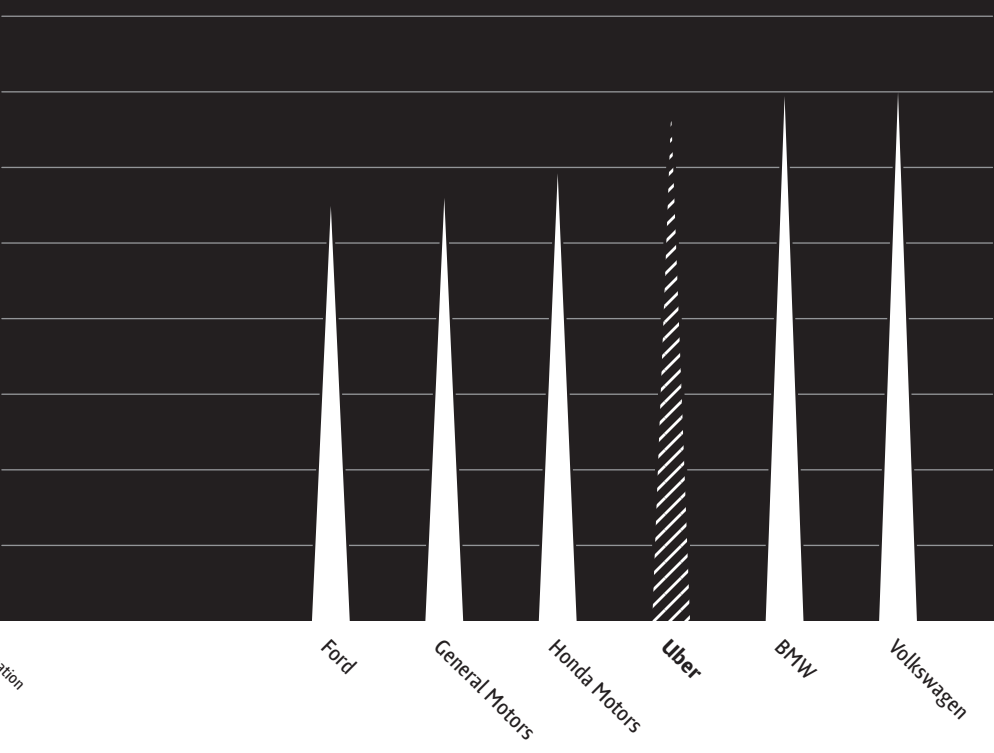
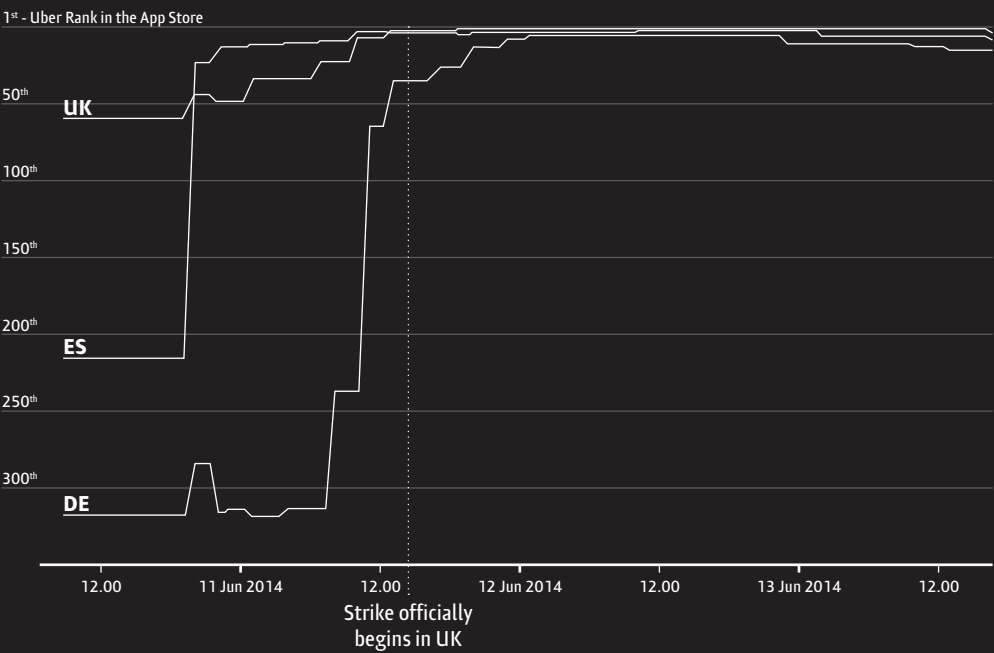


Work hours with passengers in New York, Boston and San Francisco.



Taxis vs. Uber: the European Strikes

Large-scale protests by taxi drivers that took place in London, Madrid and Berlin in June 14th 2014 obtained an opposite effect.



Sources

ag.ny.gov / Bloomberg / Business Insider UK / CNBC / Independent / insideairbnb.com / hospitalitynet.org / Penn State / salon.com / The Economist / The New York Times / The Telegraph / tradingeconomics.com