Mapping the Melbourne Sharing Economy

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1 Introduction

This report presents findings from an analysis of the scale and scope of the sharing economy in Melbourne. The central aim of this report is to outline the breadth of the sharing economy in Melbourne, and to identify future directions for further investigation.

The new services that form the sharing economy are becoming widespread and are used regularly by members of the public, both in Victoria and internationally, with many of the commercial companies that form part of this economy having a market value in the billions. A critical understanding of how sharing occurs through digital technologies, how sharing itself is conceptualised by individual, community, and corporate actors, and the wider implications of these networks for our social and economic relations, are all urgently needed.

This report maps the services, networks and discourses around the sharing economy across Melbourne – a designated 'sharing city' (Sharp 2016). Furthermore, it contributes the first comprehensive listing of networks active and available to people in Melbourne.
2 Research design

The sharing economy is becoming a central part of life in Melbourne. However, we are yet to fully understand exactly how big this new sector of the economy is, who is involved in it, or how to properly define it. This study seeks to redress these gaps, establish what is currently known about the sharing economy in Melbourne, and identify opportunities for future research.

This report explores the following questions:

- What is meant by the term ‘sharing economy’?
- What types of resources are exchanged through the sharing economy in Melbourne?
- What is known about the scale and diversity of the sharing economy in Melbourne?
- Who is participating in the sharing economy in Melbourne?
- What responses and concerns are prompted by the sharing economy in Melbourne?

Data was collected about services that can be accessed in Melbourne either online or in person from March 2016 to November 2016. We gathered data from existing publically available resources, including:

a) online platforms: e.g. Terms of Service agreements, platform-specific policies, etc;

b) modulated searching: that is, using search engines to conduct targeted searches around the keywords ‘sharing economy’, ‘Melbourne’, ‘Victoria’, and ‘Australia’; Additional keywords were refined in order to generate results that were relevant.

c) published data: analysis of existing literature and reports across academic, government and industry fields pertinent to the research topic.

These sources of information were systematically analysed for the following information:
• identification of sharing economy platforms that can be accessed in Melbourne;
• information pertinent to the regulation of sharing economy platforms in Melbourne; and,
• information pertinent to participation and social engagement in the sharing economy in Melbourne.

The process for mapping the sharing economy in Melbourne began with listing digital platforms known to the research team. Next, published data were examined for identification of further unknown platforms. Finally, modulated searches were conducted to identify additional platforms. Information on the type of organisation, mode of participation, and governance structure for each platform was gathered directly from available material on the platform sites, via direct communication with founders via social media (i.e. Twitter), and through public materials such as press releases.

Industry and government reports on the sharing economy were identified through keyword searches and institutional repositories. Reports were critically examined for accounts from key bodies, and indications of particular agendas and choices made in the presentation of opinions and evidence. Reports were also searched for data relevant to understanding the sharing economy in Melbourne, and the validity of the data queried.

Peer-reviewed academic literature on the sharing economy was sourced through journal databases, search engines and information gateways using the keywords identified above. Literature was drawn from the fields of media and communication, sociology, sustainability, urban studies, tourism and hospitality, and economics. A number of studies that have conducted field-based research on the sharing economy in other locations were also identified. The literature was assessed for relevance and coverage. Findings from the mapping exercise and analysis of reports was contextualized within this literature.

Using these approaches we were able to develop a generalised, contextual mapping of the sharing economy in Melbourne. Appendix 1 lists all networks identified during the course of the research. While claims cannot be made that the list is exhaustive given the scope of the project and fluidity of the space, it is the most comprehensive list available for Melbourne to date.
3 What is the sharing economy?

The sharing economy is an umbrella term used to describe various forms of exchange that range from renting and lending, to swapping, bartering, giving and sharing. It invites individuals, communities and organisations to forgo ownership in favour of access to resources or experiences shared between parties through a variety of mechanisms. These sorts of exchanges are not new. However, digital media have provided the means to efficiently connect those requiring access to particular shared resources at a distribution and scale that is disrupting numerous sectors, and established patterns of ownership and exchange.

Through the sharing economy, people rent rooms in private homes, loan locally available cars, source funds to commence projects, eat food prepared in other people’s kitchens, circulate used objects, and learn from others, among other things. Businesses and institutions such as municipalities also participate in this economy. The most recognisable businesses operating in the sharing economy are the global commercial platforms Uber and AirBnB with estimated market valuations of US$62.5 billion, (Isaac and de la Merced 2016) and US$30 billion (Newcomer and Huet 2016) respectively at the time of writing.

The genesis of the sharing economy can be traced to steady increases in consumption practices over the preceding decades, followed by changing attitudes towards material acquisition, accumulation, and dispossession, which in turn help to facilitate secondary markets. Technologically, it builds on processes established by earlier web platforms for the recirculation of goods in the 1990s, i.e. eBay, Freecycle, Gumtree, Amazon (Schor and Fitzmaurice 2015) and the sharing of content through social networks, i.e. Facebook, Twitter. The sharing economy also has roots in the open source movement, where propriety software and goods are made freely available, and the commons, where resources are freely available to all.

However, the sharing economy only emerged in the public eye as a contemporary phenomenon around 2011 following the early success of Uber and AirBnB and coinciding with the publication of Rachel Botsman and Roo Rogers’ (2010) Collaborative Consumption (Walsh 2011; ‘The rise of the sharing economy’ 2013). The rising prominence of the sharing economy can also be traced to a number of
broader factors: early kinship group sharing (i.e., sharing amongst immediate and known family or community members [Belk 2014; Gell 1986; Malinowski [1927] 2002]), growing concerns for depletion of natural resources, economic instability, and the development of technological infrastructure for decentralized ownership, consumption and distribution. Taken together, these dynamics prompt novel ways of exchanging resources.

The sharing economy, then, is both an old social tradition and a novel technical and cultural enterprise, but one which, in its current growth and scale, is distinctive for a number of reasons:

**Excess or idling capacity**

The sharing economy generally assumes that ‘shareable goods […] systematically have excess capacity’ (Benkler 2004: 276). Owners of underused resources may wish to put this idle capacity to use by renting or loaning out goods and spaces. Services, and individual labour also fall within this model of idle capacity, with many able to use sharing economy platforms to sell or exchange their labour or skills.

**Profit**

In turn, others are able to take advantage of ownership to put resources to work for social or material gain. Some consumers are untroubled by the burdens of asset ownership and instead offset the depreciation of goods by using excess capacity for profit. This might involve restricting their own use of assets in order to share and profit from them.

Many sharing platforms and organisations offer a wide range of resources and experiences at a cheaper rate than their more formalised counterparts in commercial markets. This is usually because people are renting or exchanging resources from peers as opposed to using a professional service with typical overheads and limited ability to respond to fluctuating demands.
Burdens of ownership
Consumers may wish to briefly acquire or make use of a particular resource which they feel is unnecessary or impractical to own. Accessing resources when needed through the sharing economy can remove burdens of ownership. The burden of ownership includes financial considerations, space limitations – especially in high-density living areas – as well as moral concerns around sustainable consumption practices.

Sustainability
The sharing economy is described as a sustainable alternative to over-consumption (Albinsson and Perera 2012; Richardson 2015). Accessing resources through the sharing economy can be a political performance of anti-consumption values, and can directly support sustainable living practices that can reduce ecological footprints of individuals. In turn, such values can be leveraged by commercial sharing platforms.

Technology
Technology marks the sharing economy as distinct from traditional forms of sharing between families and local communities because it enables sharing between strangers. Through internet-enabled devices and location-based software or applications, people are able to conveniently and effectively connect to strangers. Mobile technologies enable consumers to access platforms while on the move, or away from home.

The degree to which sharing economy actors are dependent on technology varies greatly, and not every engagement in this economic model is facilitated by technology.

Scale
Through internet technologies, the sharing economy connects dispersed networks of people and resources, enabling sharing to occur at a scale that was previously not possible (Botsman and Rogers 2010). As early as 2011, AirBnB for example, listed over one million rooms for rent, more than commercial chains such as the Hilton, InterContinental and Marriott (Upbin 2011).
Social connection

Despite the prevalence of commercial transactions within many sharing economy networks, the sharing economy emphasises social connections, communication between participants, and blurs boundaries between what is public and what is private (John 2013).

It offers people the opportunity to experience or embed themselves within local cultures. People are ideologically motivated to participate through the presence or promotion of community-oriented values with the hope that participating will encourage social connectedness.

Social connection is a key motivation for users, however networks in the sharing economy have conflicting objectives, and have been shown to regularly “fail to deliver durable social ties” (Schor and Fitzmaurice 2015: p.414).

Trust

Trust and reputation are central to the sharing economy. Platforms incorporate mechanisms for signaling trust and metrics of reputation to encourage transactions. This is established through the use of standardized crowd-sourced reputation protocols provided through digital platforms, i.e. user profiles, verifications, ratings and reviews.

Trust systems build on protocols of earlier and existing internet-based networks. For example, file-sharing platforms such as Napster, open-source knowledge sharing such as Wikipedia and Linux, and content aggregation platforms such as YouTube, that distribute user content without monetary exchange, and through which users can be connected to one another, with varying degrees of anonymity. These are combined with protocols of peer-to-peer marketplaces such as eBay and Etsy, and online payment platforms such as PayPal that handle payment verifications. These prior developments in eCommerce and payment platforms established security for online payments, making transaction risks less of an obstacle for users (providers and consumers). Finally, social media platforms, such as Facebook and Twitter, habituate users to disclosing personal information and networked interactions with strangers.
The sharing economy, clearly, is a slippery concept to define. It is easy to fall upon expansive and therefore meaningless or contradictory descriptions that encompass all activities with any of the characteristics described above. This has the effect that the social and economic merit of the sharing economy cannot be distinguished from other economic models. While Juliet Schor, Professor of Sociology at Boston College, suggests that “a solid definition of the sharing economy that reflects common usage is nearly impossible” (2014), others analysts have attempted to lock down a clear definition. For example, Deloitte argues that:

To be classified as part of the sharing economy, the platform should be owned and operated separately from the services exchanged. The ultimate owners of the assets, e.g., cars, houses, etc., whose services are exchanged on the sharing platform can be individuals, businesses or a mix of both. (Deloitte 2015a: 2, emphasis theirs)

Furthermore, there are many terms used in regards to specific dynamics of the sharing economy. For example, the peer economy, or P2P economy, describes networks operating with a peer-to-peer model through which people might buy, share, loan, or rent resources; the access economy (Rifkin 2000) defines access as preferable to ownership; the gig economy describes the supply and demand of labour for specific tasks organised on a flexible on-demand basis through mobile applications, as evidence of a wider casualisation of the workforce, (e.g. de Stefano, 2016); and the term “the mesh”, coined by Lisa Gansky (2010) in her book of the same name, indicating the use of digital technologies for connecting people and resources, in reference towards other networking technologies such as social media. The proliferation of such terms demonstrates how different perspectives emphasize particular characteristics of the sharing economy over others. As the figures below show, some terms have been taken up by public discourse more easily than others.
These semantics are part of what makes this phenomenon so tricky to navigate and define. In this report, the term ‘sharing economy’ is used for simplicity, with recognition of its bias and limitations for distinguishing between motivations and flows of value.

Beyond semantics, we suggest the sharing economy is defined by two key structural characteristics: platforms and networks. From eBay, Amazon, Facebook and Twitter to Uber and AirBnB, platforms are central to people’s social experiences and may be thought of as a type of media institution. The artefact of
platforms is the software or application interface through which users engage, and behind which typically sits a commercial entity. Both applications and platforms are closed and controlled systems. Platforms need to be thought of critically in terms their governance, which includes investigating how they are shaping social experience, how they connect (and disconnect) people, and how they derive value from users. A key step towards this aim is an index of key characteristics of platforms, this is achieved in the table appendixed to this report.

By contrast to platforms, networks are the complex arrangement of actors around a given practice, i.e. groups of individuals, collections of resources, systems of exchange that collectively form a network of practice. Not all sharing economy networks include or require the use of platforms. It is challenging to identify those without platforms, or digital trace. This scoping report therefore focuses primarily on those with some form of digital presence.

Involvement in the sharing economy can be self-defined or defined by others. Businesses seeking to align themselves with particular characteristics perceived as integral in the sharing economy cause tensions with other actors who may have different ideas about what constitutes the sharing economy and what is simply existing market practice.

We also identify a number of key actors that make up the sharing economy. These include: individuals engaging as consumers and/or providers, both for-profit and non-profit organisations, as well as social enterprises, public institutions and communities. At the regulatory level, these also include regulatory bodies and local, state and federal governments. Our analysis of the literature shows that insufficient work has been done on the businesses and organisations operating in these spaces (see also Cheng 2016). Emerging sharing economy start-ups have varying degrees of success (Evans and Schmalensee 2010). Therefore, the business models of sharing economy start-ups in Melbourne, the roles of local and international entrepreneurs and stakeholders, and motivations of investors, all require further investigation.
Governance models within the sharing economy vary dramatically. It is important to map these distinctions and to consider their impact upon the wider structure of the sharing economy. We systematically identified and indexed all sharing economy platforms presently available in Melbourne in order to map governance structures and value flows based on information available at the time. The full index is included as an Appendix at the end of this report.

Summary of key findings

- The sharing economy is an umbrella term used to describe various forms of exchange; from renting and lending, to swapping, bartering, giving and sharing.
- The sharing economy is both an old social tradition and a novel cultural enterprise.
- The sharing economy is distinctive for the following reasons: technology; excess or idling capacity; burdens of ownership; profit; social connection; trust; scale; and, sustainability.
- The sharing economy means different things to different actors. Actors appropriate the definition and emphasize the characteristics that serve their interests best.
- The governance models of organisations in the sharing economy differ immensely.
- More needs to be known about the diversity in how organisations in the sharing economy are governed.
- Different governance models require different support and regulation.
4 What is being shared: Types of resources

There is a diverse range of resources exchanged in sharing economy networks across Melbourne. We place these resources into the following loose categories: goods (food, material objects); assets (amenities, facilities, spaces); and services (knowledge, labour). These categories are described below, together with representative examples.

Goods

Food

![Food network](http://www.eatwithme.net/welcome)

Food networks connect people for a range of activities related to producing and eating food. Food produce may be sold, given, or shared. Some networks enable growers to swap seeds and produce with other gardeners or to share knowledge of private land available for growing produce. Other networks bring people together to share meals and company in established restaurants and private residences, or enable food to be exchanged through meal sharing.
Significant examples active in Melbourne include:


- **EatWithMe** ([http://www.eatwithme.net/](http://www.eatwithme.net/)): Connects people with others interested in planning or attending events to share food and eat together. Events may be in restaurants or private homes.

- **Growstuff** ([http://www.growstuff.org/](http://www.growstuff.org/)): An open source platform for food gardeners to learn about growing food, track harvests, and swap seeds and produce.

- **Mamabake** ([http://mamabake.com/](http://mamabake.com/)): A network for mothers to form groups that meet to cook large batches of meals which are distributed among the group.

- **Melbourne Permablitz Network** ([http://www.permablitz.net/](http://www.permablitz.net/)): People come together to create edible gardens and share skills related to permaculture and sustainable living. The network is based on volunteerism and reciprocity.

- **Open Food Network** ([https://openfoodnetwork.org/](https://openfoodnetwork.org/)): The Open Food Network is an open marketplace for finding, buying, selling and moving sustainable local food that supports alternatives to corporate controlled supply chains.
Objects

These networks facilitate the exchange of material objects and goods (such as tools, clothes, furniture). Goods can be loaned or rented, or may permanently change ownership. These networks operate alongside other popular established platforms such as eBay and Gumtree.

Examples include:

- **Brunswick Tool Library** ([http://brunswicktoollibrary.org/](http://brunswicktoollibrary.org/)): A library of hand tools, power tools, garden ladders, etc. for fee-paying members to borrow for use on their own projects.


• **Streetbank** ([http://www.streetbank.com/](http://www.streetbank.com/)): A platform for people to list objects and skills to be shared or given away, and facilitate neighbourly connections. It is reciprocal, meaning users must offer something to give or share to use the platform.

• **Zilch** ([http://www.au.zilch.com/](http://www.au.zilch.com/)): A platform for giving away or finding objects for free.

**Assets**

**Mobility**

![Carhood](https://www.carhood.com.au/)

Figure 5 Home page, Carhood, 11 November 2016. Author's screenshot. Retrieved from URL: [https://www.carhood.com.au/](https://www.carhood.com.au/)

These networks provide access to vehicles for short periods of time for a fee or hourly rate. Compared to car-hire organisations with central locations, vehicles are usually distributed around neighbourhoods. Vehicle platforms also enable the transportation of people and objects.
Examples include:


With car-pooling, the driver determines the journey, and journey costs, such as petrol, may be distributed amongst passengers. Where the driver performs a service, such as car-sourcing (the transportation of another person/persons or object) a fare will usually be charged, together with a platform fee.

- **Catchalift** ([http://catchalift.com/]), **CoSeats** ([http://www.coseats.com/]), and **ShareURride** ([http://www.shareurride.com.au/]): Enable more people to use the same vehicle by sharing costs.

- **Uber** and **Uber X** ([https://www.uber.com/cities/melbourne/]): Car rides on demand.
Domestic spaces

![Warm Showers](https://www.warmshowers.org/)

Figure 6 Home page, Warm Showers, 11 November 2016. Author’s screenshot. Retrieved from URL: https://www.warmshowers.org/

These networks provide accommodation. Shared rooms, private rooms, and whole properties are available. Ownership or occupation of assets is retained and people rent access for short periods of time.

Examples include:


- **Broads Abroad Travel Network** ([https://www.broadsabroad.net/](https://www.broadsabroad.net/)): Social network enabling mature-age female members to arrange to stay at one another’s house for free.

• **Melbourne Homestay** ([https://www.melbournehomestay.org/](https://www.melbournehomestay.org/)): Online marketplace for non-Australian temporary residents, typically students.


• **WarmShowers** ([https://www.warmshowers.org/](https://www.warmshowers.org/)): Social network for touring cyclists to coordinate free accommodation.

Further to the above are networks that enable access to underutilised domestic spaces for asset storage or parking.

Examples include:


• **Spacer** ([https://www.spacer.com.au](https://www.spacer.com.au)) and **Spacelli** ([https://spacelli.com](https://spacelli.com)): Connects users who need somewhere to store their things with people who have extra space.
Sharing economy finance networks enable people to raise money for specific goals by lending and borrowing, investing or donating small amounts of money to large number of others. Fundraising models vary. Most business-oriented campaigns, such as those to fund a prototype of a new product, only allow campaigns to keep money if funding goals are reached, whereas social or personal campaigns may be more flexible and allow campaigns to keep any money raised. Most platforms charge administration fees. Platforms coordinate transferal of money and verification of campaigners. While platforms have different policies regarding type of campaigns allowed, ultimately donors decide whether a campaign is worthy of being funded.
Examples include:

- **Chuffed** ([https://chuffed.org/](https://chuffed.org/)): Crowdfunds only non-profit, community groups and social enterprises. One of the few platforms not to charge administration fees to campaigners, and to issue tax deductible receipts.


- **Pozible** ([https://pozible.com/](https://pozible.com/)): Like Kickstarter ([https://www.kickstarter.com](https://www.kickstarter.com)), a crowdfunding platforms that allows campaigners to reward donors based on amounts pledged.

Labour and skills

Service networks operate as marketplaces for sharing labour and skills. Task-based platforms are used by individuals and organisations to outsource tasks, which vary in the degree of skill required. Tasks can be fixed price, auctioned, or exchanged for comparative services.

Examples include:

- **Airtasker** ([https://www.airtasker.com/](https://www.airtasker.com/)): A marketplace for people and businesses to outsource tasks and services.
- **GiveGet** ([https://www.giveget.biz/](https://www.giveget.biz/)): A platform for entrepreneurs to exchange skills for in-platform credit called $Getbacks and to collaborate to complete tasks.
- **MeeMeeP** ([https://www.meemeep.com/](https://www.meemeep.com/)): A freelance platform for delivery drivers.

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Figure 8 Home page, GiveGet, 28 October 2016. Author’s screenshot. Retrieved from URL: https://www.giveget.biz/
Peripheral and intersecting networks

In addition to networks that are possible to categorise as part of the sharing economy, there are a range of other organisations and networks that align or overlap with the sharing economy through related values and practices.

Co-working spaces

Co-working spaces provide rentable work-areas with additional supportive infrastructure and facilities such as wireless internet, kitchens, meeting rooms, and social spaces for members on a fixed, casual or hourly basis. Co-working spaces often employ community managers (who's role is to foster connections between members), host networking and social events, and position themselves as hotbeds of productivity, innovation and entrepreneurship.

Co-working spaces are abundant in Melbourne. Examples include:

- ACMI X (https://www.acmi.net.au/acmi-x/)
- Depo8 (http://depo8.com/)
- Electron Workshop (http://www.electronworkshop.com.au/)
- Hub Southern Cross (http://www.hubaustralia.com/)
- Inspire9 (http://inspire9.com/)
- Nest Coworking (http://nestcoworking.com.au/)
- Queens Collective (http://www.queenscollective.com/)
- York Butter Factory (http://yorkbutterfactory.com/)

Of particular note, are co-working spaces for particular groups, including:

- Happy Hubbub (http://www.happyhubbub.com.au/): for parents of young children, with childcare facilities on site
- One Roof Women (http://melbourne.oneroofwomen.com/): for female entrepreneurs
- The Arcade (http://thearcade.melbourne/): not for profit coworking space for game developers

**Maker-spaces**

Maker-spaces are sometimes referred to as hacker-spaces, hack-spaces, or fab-labs. They are physical spaces where people gather to create, invent, and learn. Maker spaces often have resources such as 3D printers, electronics, craft and hardware supplies and tools. Maker-spaces are predominantly collaborative and creative learning environments, as well as sites for technological experimentation, hardware and software development, and idea prototyping.

Maker-spaces are similar to co-working spaces in that they provide facilities, space and tools. Many have membership and facility fees that help cover the day-to-day operation costs, and varying policies for replacement of consumable materials.

Indicative examples in Melbourne include:

- Connected Community Hackerspace ([http://www.hackmelbourne.org/](http://www.hackmelbourne.org/))
- Footscray Maker Lab ([http://footscraymakerlab.com/](http://footscraymakerlab.com/))
- Make-Create ([http://make-create.org/](http://make-create.org/))

**Municipal assets and the commons**

These assets are owned by local government and are made available to members of the community at low or no cost. They have historical foundation in the use of the “commons”, and in publically owned but privately used garden allotments.

Examples include:

Friendly Societies or Mutual Benevolent Societies

Prior to contemporary commercial insurance and government instituted welfare systems, Friendly Societies provided members with social roots in religious, political, trade or cultural affiliations with financial and social services. In the early part of the 20th century most Australians had an affiliation with a Friendly Society. While many Friendly Societies have discontinued their operations, and others have developed into purely commercial entities, there are still Friendly Societies that offer financial services to their member-owners. For example, a detailed list can be seen here: http://www.customerownedbanking.asn.au/members/list-of-members

Other examples of friendly or mutual benevolent societies include:

- Australian Scholarship Group (https://www.asg.com.au/)

Servicing organisations

There is a growing market of startup organisations servicing and/or exploiting the sharing economy industry. An investigation of the sharing economy needs to take into account the full ecosystem of these servicing networks, and the conditions in which they develop.

Examples of servicing organisations around the domestic spaces sector include:

- AirDNA (https://www.airdna.co/): Provides data and insights on local AirBnB market for property managers.
- Horizon (http://www.horizonapp.co/): A smartphone app that analyses social media profiles to identify mutual connections between AirBnB hosts and guests.
- Keycafe (https://www.keycafe.com/): Allows for remote controlling of access to properties.

**Summary of key findings**

- We categorise resources available through the sharing economy in Melbourne in the following way: goods (food, material objects); assets (amenities, facilities, spaces); and, services (knowledge, labour).
- A comprehensive directory of sharing economy networks available in Melbourne was not previously available to consumers.
- In addition, resources are available through peripheral and intersecting networks such as co-working spaces, maker spaces, municipal assets, and friendly societies.
- There is a growing sector of organisations servicing the sharing economy that form part of a broader ecosystem.
What is the scale of the sharing economy?

There is not yet a robust quantification process for understanding the impact of the sharing economy (Cheng 2016: 60; Schor and Fitzmaurice 2015). Given that many of the key actors are private, there is limited reliable data on revenues and scale. Yet, this has not prevented industry authorities speculating on the market size and growth. Anecdotal reports tell us that the sharing economy in fact comprises a comparatively small part of the global economy – just 5% of total revenue for key sectors impacted by the sharing economy (PwC 2014). PricewaterhouseCoopers (PwC) estimated in 2014 that the global revenue of the sharing economy stood at around US$15 billion, and that figure was expected to increase to US$335 billion by 2025 (PwC 2014).

Based on a survey of 1000 US consumers, the 2014 PwC report stated that 44% were familiar with the sharing economy, and 19% had participated in some form (PwC 2014). However, this survey includes corporations such as Amazon and Ebay in their definition of the sharing economy which highlights ambiguities in definitions of the field and how these play out across attempts at analysis of reach.

A more recent analysis in 2016 shows that, in Europe at least, the sharing economy is in fact ‘expanding at roughly double the pace’ and such rapid growth is expected to be sustained over the coming decade (PwC 2016).

Drawing from institutional data on JP Morgan’s own worldwide customer base (hence already skewed towards the somewhat affluent), the JPMorgan Chase & Co. Institute examined both a randomized sample of 1 million bank customers together with a dataset of 260,000 individuals who had transaction activity in relation to 30 specific sharing economy platforms (Farrell and Grieg 2016). From the analysis of both datasets they found that 4% of people have participated in the sharing economy platforms between October 2012 to October 2015, 1% earned an income from their activities, and that the number of people participating was increasing, with a 43 fold growth over the three-year period of analysis. Though a full list of the 30 platforms identified was not given, it included AirBnB, Uber, as well as eBay.
Pew Research Center published a recent report on the scope and impact of the shared, collaborative and on-demand economy (Smith 2016). From a representative sample of 4787 US participants the survey found that a total of 72% of Americans have used a sharing on-demand service at least once. While 72% is at first glance an impressive figure, this represents participation in both sharing and on-demand services, such as online shopping, therefore a significant percentage may in fact only engage with on-demand services.

Survey data on participation is sparse and generally based upon small sample sizes, or partial representations. Furthermore, surveys vary in terms of scope and criteria, so results are not easily comparable. However, it can be said that participation in sharing economy activities is growing rapidly worldwide, while, as noted above, still making up just a small portion of the greater economy.

Studies of the scale of the sharing economy in the Australian context are few and far between. There are currently no comprehensive participation figures for the sharing economy in Melbourne. Data on specific platform use is typically derived from third party organisations data-scraping platforms – e.g., figures from AirDNA (http://www.AirDNA.com) report that there were 14,234 active AirBnB rentals and 10,251 active hosts in the month of October 2016. Furthermore, where data on specific platform use is available, it is near impossible to extrapolate user engagement across platforms.

In 2014, a study conducted by Vision Critical with Collaborative Lab researched behaviours and attitudes towards the sharing economy (Vision Critical 2014). The study suggests that 53% of Australians had recently participated in the sharing economy. Participation in this report includes sharing with friends or family without the use of technology-enabled platforms, and details of methodology and sample are not provided. The Vision Critical study shows a definite awareness of the sharing economy in Australia, but there is insufficient data to speculate further on participation and actors, or to ascertain how specific or relevant these findings are to Melbourne. Given Australia’s particular geography, there are likely to be striking differences in experiences of participation between those participating in remote, rural and urban areas, aside from socio-demographic differences.
Summary of key findings

- There is not yet a robust quantification process for understanding the impact of the sharing economy.
- Indications are that the sharing economy is growing steadily in scale, and this growth is expected to continue.
- While there is evidence of wide enthusiasm for participation, relatively little information is available in the public sphere about how many Australians, and how many Melbournians, participate in the sharing economy.
Who is participating: Key actors

A range of individuals participate in the sharing economy in Melbourne, each with values and motivations particular to their circumstance. It is relevant to note as well that many who own and share assets also borrow other assets i.e. individuals often participate in various roles within this economic space.

Using participation data from the UK (Stokes et al 2014) we can surmise that those employed in professional roles are more likely to participate than pensioners, ethnic minorities, or those who are unskilled or unemployed.

Scholars Juliet Schor and Connor Fitzmaurice (2015) identify that young adults, or millennials, in the US are disproportionately active in the sharing economy as key instigators and innovators (pp. 410-411). In Australia, millennials are among the highest users of social networking and mobile technologies that underpin much of the sharing economy (Ewing et al. 2014).

While certain actors are easily identifiable through traces on online activity, others are more difficult to identify, especially at the local level where networks are less reliant on digital technologies to coordinate member activities. Participation in the sharing economy is also a matter of digital inclusion (Thomas et al. 2016). Access to digital technologies tend to correlate with other social advantages. Out of the lowest income houses in Australia, four in ten are without internet access (Australian Bureau of Statistics 2016). Those without access to digital technologies are certainly disadvantaged in the sharing economy.

Those with higher economic capital are more likely to participate in the sharing economy (Nesta 2014), hence the sharing economy is likely to reflect, and perhaps exacerbate, existing social divides. Advocates of the sharing economy claim that it can contribute to a more equal and socially progressive economy (Schor and Fitzmaurice 2015: 422). Yet, studies in other locations have pointed to how the sharing economy sustains existing socio-economic inequalities. Schor and Fitzmaurice (2015) show how, in the US, people engage in food swaps with those who they perceived to have similar cultural capital, with value judgments made based on the person’s appearance, as well as the appearance of the product and its packaging. Those trading skills in time banks are likely to trade skills with
persons that replicate existing cultural capital bias (Dubois et al 2014). Racial bias also impacts on participation. Edelman and Luca (2014) argue that users of AirBnB discriminate based on race, with users paying 12% more to stay at the properties of whites than non-whites.

Systematic and detailed fieldwork is needed to explore the contexts for sharing economy engagement and inclusion across these networks.

**Summary of key findings**

- Individuals participate in the sharing economy in diverse and multiple ways.
- The sharing economy likely exacerbates existing social divides.
- Those employed in professional roles are more likely to participate.
- Millennials are more likely to participate than other age groups.
- Not all actors in the sharing economy leave digital traces. Some are difficult to identify and locate.
- Detailed fieldwork is needed to understand the scope of the sharing economy in Melbourne – who participates, who is prevented from participating, and why.
What responses does the sharing economy provoke?

Regulatory concerns

The most notable responses to the sharing economy have centred around industry-specific disruptions, regulations and concerns for lack of compliance with Australian laws.

The legality of Uber has been at the centre of this debate. While the company has been operating in Australia since 2012, it has done so in breach of various State and Territory laws that require companies or drivers to hold a hire car license for each commercial passenger vehicle, which costs AUD$23,017 in Victoria (Taxi Service Commission 2016). State governments have historically restricted these licenses so that hire car companies would not directly compete with the Taxi industry. The success of Uber has seen the New South Wales, Australian Capital Territory, and Western Australian governments engage in law reform to allow the company to operate legally. A recent Deloitte study estimated taxi fares in Australia to be roughly 20% higher than the average UberX fare, taking surge pricing into consideration (Deloitte 2016).

Uber is widely used in Victoria but has been operating in a legal grey area. It was effectively banned in December 2015 when the County Court of Victoria found that Uber driver Nathan Brenner was operating in breach of the Transport Act. However, this was overturned on appeal, with the Court finding that “legislation which applied to commercial passenger vehicles excluded Uber arrangements” (Brown 2016). In response to the case the Labor Victorian Government sought to close this loophole in order to clarify the powers that the Taxi Service Commissioner has. However, following pressure from Sex Party member Fiona Patten who introduced a private members bill on the issue, the Government agreed to develop a comprehensive regulatory and legislative framework for regulating the taxi, hire-car, and ride-sharing industries.

It is not clear what this will look like in practice, but other States and Territories in Australia offer useful models for consideration. Looking ahead, arguably the most important issue to be raised by these recent reforms is the question of access. Many disabled commuters are reliant on wheelchair accessible taxis to get around and these trips are subsidised by the state. UberAssist launched in
2015 to serve this segment of the population. However, in New South Wales, for example, ride-sharing is not yet embedded into these existing subsidy schemes (although a review is underway). Embedding these new modes of transport into these schemes and ensuring an ongoing supply of accessible transport are critical to any future reform effort. Demonstrating how transportation plans can integrate Uber, the Victorian Racing Club designated pick-up and drop-off points at Flemington racetrack over the Melbourne Cup weekend in 2016.

Regulatory issues have also emerged around the sharing of domestic spaces, most notably through the paid service AirBnB. The private accommodation market in Melbourne reportedly undercuts the hotel index by 52%, with the average private room costing AUD$75 compared to AUD$155 (Olsen and Kemp 2015: 7). A case in June 2016 allowed a landlord to evict tenants who were subletting their entire St Kilda home through the service (Swan v Uecker 2016). Owners, corporations, and long-term tenants in apartment buildings have also battled with other apartment owners in the complex who continually lease out their apartment to short-stay visitors. This is largely due to the disruption that short-stay residents are likely to cause (such as loud parties) as well as the security issues that are raised when a range of people have access to a shared complex. However, a Supreme Court of Victoria judgment in July 2016 found that an owner’s corporation could not ban owners from leasing their property through short-term operators (Owners Corporation PS 501391P v Balcombe 2016).

In response to these voiced concerns, a number of reports specifically addressing regulation and the sharing economy emerged. The Institute of Public Affairs recommended that industry-specific regulations be avoided in favour of encouraging self-regulation that could occur through the “reputational rating mechanisms” and flexibility already embedded in many sharing platforms (Allen and Berg 2014). A Deloitte report in 2015 reviewed the state of the collaborative economy (an alternative name for the sharing economy) in New South Wales and similarly noted that the collaborative economy did not comply with current Australian laws, given they are directed towards traditional consumer markets (Deloitte 2015b).

A Grattan Institute report released in 2016 took an even more detailed regulatory angle and addressed some of the common regulatory issues associated with the sharing economy (Minifie and Wiltshire 2016). One of its recommendations was
that state governments across Australia ought to legalise ride-sharing and provide more power to owner-corporations so they could manage the noise and loss of amenity that often comes with people using short-stay accommodation. Rather than banning short-stay rentals, these actors should focus on advocating for more powers to manage the loss of amenity from use of common areas and a swifter dispute resolution system for noise complaints.

A number of significant political interventions have also occurred in this space. In the lead up to the 2016 General Election, the Australian Labor Party released their National Sharing Economy Principles (Australian Labor Party 2016), which stated that personal resources could be shared under rules and regulations specific to the sharing economy, with appropriate taxation, licensing, insurance, and consumer protection; that workers should be compensated equal to industry standards; and, that public safety and accessibility for all should be secured. The Liberal Party did not release an equivalent policy but broadly addressed the sharing economy as part of their National Innovation and Science Agenda (The Liberal Party of Australia 2016). At the state level, a number of governments have embraced the sharing economy, most notably New South Wales, Western Australia, and the Australian Capital Territory.

The role of regulatory and administrative bodies in sharing economy regulation is still fluid. Researchers have raised questions as to how governments can optimise the integration of the sharing economy with existing service providers (Cohen and Kietzmann 2014). The impact of the sharing economy on particular sectors has been identified as a key concern, though this needs to be researched further (Lyons and Wearing 2015; Richardson 2015).

It is of course important to focus on the regulatory problems raised by such examples, however, we must move beyond the dominant narrative of disruption. To focus on regulation and the economy means that we still do not know enough about the varied social and economic contexts through which people come to the sharing economy. While the relative cheapness of sharing economy providers is recognised (see IPA 2015), scales of engagement are still represented as largely homogeneous, with little attention to the unique local and cultural factors influencing engagement.
Labour Rights

Scholars and critical commentators are also concerned that the sharing economy is contributing to a casualised, on-demand labour market with little to no income security (Lyons and Wearing 2015; Schor and Fitzmaurice 2015; de Stefano 2016). Sharing economy start-ups are shown to evade tax and regulation (Lyons and Wearing 2015). Sharing platforms have also liberally interpreted (or, some would say, simply ignored) regulations regarding the health, safety, and working rights of individuals.

Juliet Schor (2014) argues that the sharing economy allows for a flow-on displacement of workers, whereby higher educated workers drive taxis and perform domestic chores, pushing lower-socio-economic workers out of such roles. Sharing economy organisations are criticised for adopting rhetoric that describes them as mobile and flexible workplaces, in which workers are ‘partners’, yet these organisations operate without a “traditional sense of ‘workplace’ or ‘coworkers’” (Gray et al 2016). Work itself is ‘time-sensitive, algorithmically mediated’, tightly controlled by platform owners, yet precarious (de Stefano 2016).

As Jim Minifie and Trent Wiltshire note, workers on independent contracts lose many of the rights generally associated with employees such as a “minimum wage, maximum weekly hours, paid leave, notice periods after dismissal, redundancy payouts and unfair dismissal protections” (Minifie and Wiltshire 2016). These issues were publically raised by UnionsACT during the 2015 ACT Taxi Innovation Review (ACT Government 2015) noting that the above system allows Uber to avoid providing many standard workers rights. Dismissal, for example, simply involves the company “[deactivating] a worker without notice and entirely on the reviews of customers [… a process that is] at odds with the National Employment Standards” (UnionsACT 2015). The recent Central London Employment Tribunal’s decision that Uber drivers are not self-employed contractors utilising the services of the Uber communications platform (Aslam Farrah and Others v. Uber), but are employees entitled to entitled to holidays, sick pay, and a minimum wage, is a ruling that undermines Uber’s business model, may well have an impact on Uber internationally, and, through setting a precedent, may impact on other platforms utilising a similar business model. Needless to say, Uber is appealing the decision.
Working to discharge such issues for Australian workers, plaintiff law firm Maurice Blackburn is working with food delivery drivers employed by Deliveroo and Foodora (companies similar to UberEats who make use of digital media and on-demand workers to provide food delivery services) to build a test case around the legal limits of the independent contractor definition. The argument is that, whereas an independent contractor runs their own business and controls how the service is delivered, these companies require employees to wear uniforms, attend training and, it is argued, generally treat people like “employees” (Hatch 2016). More information is available through Young Workers Centre (http://www.youngworkers.org.au/rights4ridersfaq).

Crowdwork and crowdsourcing are also disruptive collaborative infrastructures. These are practices where large crowds of people perform micro-tasks to complete a larger project goal (e.g. Wikipedia, Mechanical Turk). People’s actions are aligned to the requirements of the platform rather than the activities of others, and the overall coordination of actions are algorithmically orchestrated, raising questions about the nature of collaboration.

In relation to these changing markets, Minifie and Wiltshire (2016) argues that better labour regulations would help protect contractors working in the sharing economy, and tighter tax laws could provide better outcomes for the Australian public.

Despite the fact that questions of disruption, regulation, and labour have dominated public discourse about the sharing economy, our review identifies areas in which further research is required. In particular, these include questions about access, inclusion and equity. The sharing economy is distributed but not equally accessible, tending to cluster in urban areas that have good infrastructure and strong cultural or creative industries. Looking beyond Melbourne, this poses challenges to people living in regional and rural areas.
Summary of key findings

- The sharing economy prompts concerns around regulation, worker’s rights, and safety.
- Regulation needs to be specific to the local context.
- Issues around access, inclusion and equity need to be addressed.
8 Key areas for future investigation

We identify a current lack of attention to the following issues, particularly around matters of access and equity – such as digital literacy and socio-economic stratification – and suggest that future analyses of the sharing economy and public discourse focus on:

1. enabling equity
2. facilitating community sharing
3. facilitating data sharing
4. developing appropriate regulatory approaches
5. reducing the ecological footprint of residents.

These key areas should be investigated to inform actions that could be adopted to enable Melbourne to develop as a sustainable and socially progressive city.
9 Conclusion

The social and economic challenges emerging from the sharing economy are multifaceted. This report has set out details about the sharing economy in Melbourne. We have developed a generalised conceptual understanding of the key considerations of the sharing economy for Melbourne.

More work is needed to understand the impact and potential of the sharing economy in Melbourne. To begin, we suggest the following lines of enquiry:

- Who participates in the sharing economy;
- Exploring what barriers to entry into the sharing economy exist, and who they affect;
- Whether there is a digital divide for participation;
- Whether there are geographical inequalities affecting participation;
- Where and how bias exists in the sharing economy;
- How trust and reputation mechanisms might present biases, and how these can be avoided;
- How the sharing economy can be appropriately regulated;
- How consumers in the sharing economy can be better protected;
- How the complexity of user experience can be fed into future developments in this space;
- How different consumers view and engage with the sharing economy. What does sharing mean to people.

The coming years will be decisive for local and state actors in determining how to respond to the sharing economy in Melbourne. Strategies ought to be adopted in relation to the five key areas identified in this report to enable the sharing economy to develop in Melbourne.

We are now working with local thought leaders and participants – key experts, industry leaders, and practitioners – toward developing a shared agenda that will inform the future directions of our research in addressing the issues identified in this report.
10 References


Aslam & Ors v Uber BV & Ors [2016] EW Misc B68 (ET) (28 October 2016)


## Appendix 1: Index of key characteristics of platforms identified during the project

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<td>Mission</td>
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<td>Security/Peace of mind</td>
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<td>Website</td>
<td>Fees for service</td>
<td>Manage listings, connect users, verify users, other</td>
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</table>

* Platform types: P2P (Peer-to-Peer), B2C (Business-to-Consumer), B2B (Business-to-Business)
* Form of exchange between peers: Dollar Economies (Money), Alternative (Alternative Form of Exchange)
* Business approach: Free (Free), Mission (Mission)
* Status of resources: Existing-user owned (Existing-user owned), Bought-for-purpose owned (Bought-for-purpose owned)
* What the platform affords: Extract value from existing resources (Extract value from existing resources), Value for money from platform owned (Value for money from platform owned), Enhance social connections (Enhance social connections), Sustainable (Sustainable), Security/Peace of mind (Security/Peace of mind), Group insurance (Group insurance)
* Technology: Tech-enabled (Tech-enabled), Tech-dependent (Tech-dependent)
* Channels: Website (Website), Application (Application)
* How platform is monetised: Fees for service (Fees for service), Membership plans (Membership plans), Community donations (Community donations)

* Key activities performed by platform: Manage listings, connect users, verify users, other, Self advertising, Sell advertising space, Fare calculations, travel directions, Advertising, ?
Appendix 2: List of networks currently available in Melbourne

Goods

Food

- Australian City Farms & Community Gardens Network (http://communitygarden.org.au/)
- EatWithMe (http://www.eatwithme.net/)
- Growstuff (http://www.growstuff.org/)
- Mamabake (http://mamabake.com/)
- Melbourne Permablitz Network (http://www.permablitz.net/)
- Open Food Network (https://openfoodnetwork.org/)
- RipeNearMe (http://ripenear.me)

Objects

- Brunswick Tool Library (http://brunswicktoollibrary.org/)
- Clothing Exchange (http://www.clothingexchange.com.au/)
- Freecycle (https://www.freecycle.org/)
- Friends with Things (http://friendswiththings.com.au/)
- Gumtree (http://www.gumtree.com.au/)
- Rentoid (http://www.rentoid.com/)
- Streetbank (http://www.streetbank.com/)
- Zilch (http://www.au.ziilch.com/)
**Assets**

**Mobility**

- Carhood (https://www.carhood.com.au/)
- CarNextDoor (https://www.carnextdoor.com.au/)
- CoSeats (http://www.coseats.com/)
- Drive My Car (http://www.drivemycar.com.au/)
- Flexicar (http://flexicar.com.au/)
- GoGet (https://www.goget.com.au/)
- Green Car Share (http://www.greensharecar.com.au/)
- MyCarPooling (http://mycarpooling.com.au/)
- ShareURride (http://www.shareurride.com.au/)
- Uber and Uber X (https://www.uber.com/cities/melbourne/)

**Domestic spaces, storage and parking**

- AirBnB (https://www.airbnb.com.au/)
- Broads Abroad Travel Network (https://www.broadsabroad.net/)
- Couch Surfing (https://www.couchsurfing.com/)
- Divvy (https://www.divvyparking.com/)
- Find a car park (https://findacarpark.com.au/)
- JustPark (https://www.justpark.com)
- Melbourne Homestay (https://www.melbournehomestay.org/)
- Nomador (https://www.nomador.com/)
- Parkhound (https://www.parkhound.com.au/)
- Parking Made Easy (https://www.parkingmadeeasy.com.au/)
- Spacelli (https://spacelli.com)
- Spaceout (http://www.spaceout.com.au/)
- Stayz (https://www.stayz.com.au/)
- Swap Nights (https://swapnights.com/) *
- Trusted Housesitters Australia (https://www.trustedhousesitters.com/au/)
- WarmShowers (https://www.warmshowers.org/)
- Your Home My Home (http://www.yourhomemyhome.com.au/)
Services

Finances

- Chuffed (https://chuffed.org/)
- Kickstarter (https://www.kickstarter.com)
- MoneyPlace (https://moneyplace.com.au/)
- OzCrowd (http://ozcrowd.com/)
- Pozible (https://pozible.com/)
- RateSetter (https://www.ratesetter.com.au/)
- SocietyOne (https://www.societyone.com.au/)
- ThinCats Australia (https://www.thincats.com.au/)

Labour

- Airtasker (https://www.airtasker.com/)
- Community Exchange System Australia (https://www.communityexchange.net.au/)
- CrewWithMe (http://www.crewwith.me/)
- GiveGet (https://www.giveget.biz/)
- Help me with it (https://helpmewithit.org.au)
- Langademy (https://www.langademy.com)
- MeeMeep (https://www.meemeep.com/)
- Ozlance (https://ozlance.com.au/)
- Sidekicker (https://www.sidekicker.com.au/)
Appendix 3: Useful information regarding the sharing economy

Information on the Sharing Economy and Tax from the Australian Tax Office

Providing taxi travel services through ride sourcing and your tax obligations:

Further information sources on the sharing economy

Collaborative consumption: www.collaborativeconsumption.com
The site extends the work of Rachel Botsman from her book What’s Mine is Yours (2010). It draws together a range of curated content, and collated information. It has both a comprehensive directory of existing sharing economy platforms, and a regularly updated list of emerging reports on the sharing economy.

Ouishare: http://ouishare.net
The Ouishare network supports resource-sharing systems and activities through an online magazine and an annual festival, as well as a job board, and a tool kit called Ouikit designed to help develop sharing communities.

Shareable: www.shareable.net
Shareable is an online magazine that provides news, and acts as a ‘connection hub for the sharing transformation’. Shareable is international in scale. Darren Sharp is the local editor for Melbourne and Australia.