

[www.pwc.com/cz](http://www.pwc.com/cz)

*The Future of the  
Sharing Economy*  
FIR Annual Conference 2017

**pwc**

*Surfboard*

\$7 a day

*Boombox*

\$5 a day

*Roof Rack*

\$8 a day

*Mini-van rental*

\$30 a day

Video

*Dress*

\$4 a day



A background image showing a hand holding a key over an open palm, symbolizing offering or access. The text is overlaid on this image.

*No matter how you name it  
– sharing economy, peer to peer  
economy, the on-demand economy,  
collaborative economy –  
it is getting **very big very fast.***

It is something that business executives very much  
need to tune into.

---

## ***Projected growth of the sharing economy***

Globally

Global revenue  
by 2025

**\$335**  
**billion**

PwC's projections show that five key sharing sectors – travel, car sharing, finance, staffing and music and video streaming – have the potential to increase global revenues from roughly \$15 (2015) to around **\$335 billion by 2025**.

## *The sharing economy may be a bright spot of Europe's economy through 2025...*

We project sharing economy revenues will grow at roughly **35% per year**, around ten times faster than the wider economy as a whole – which we expect to expand at roughly 3% per year over the same period.

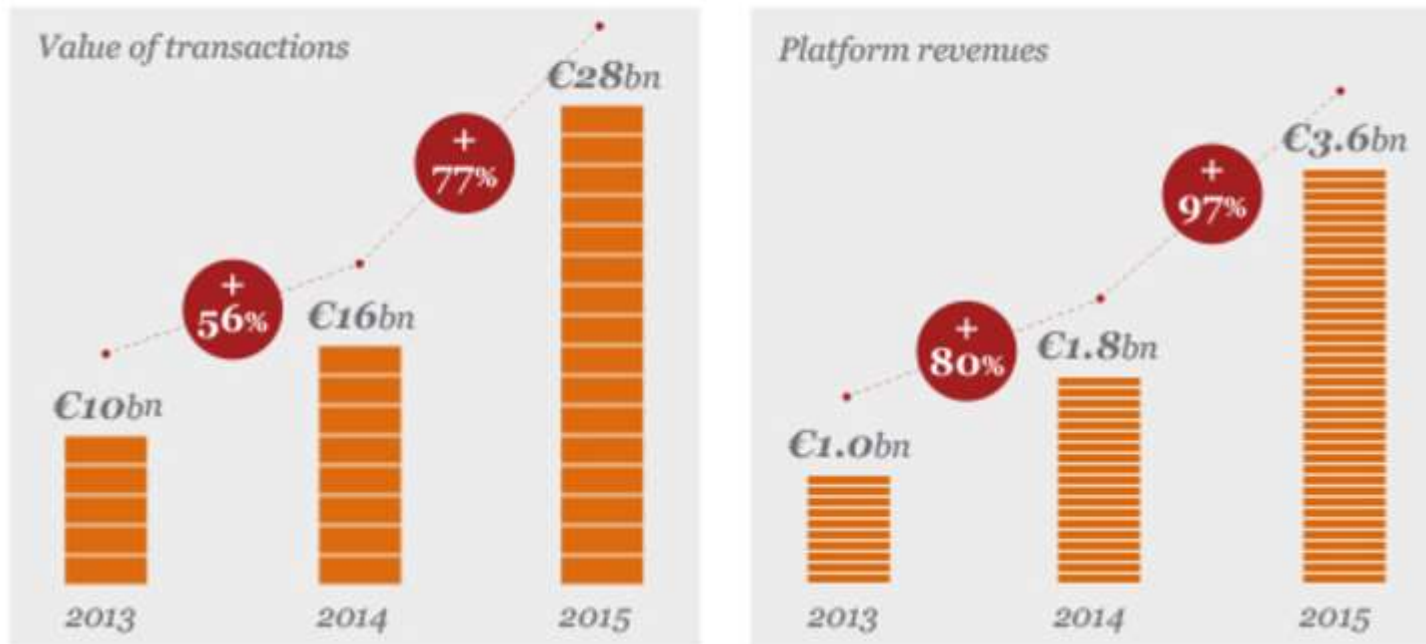
Europe's five key sharing economy sectors could deliver **€570 billion by 2025** in transactions, up from just €28 billion today.

Estimated revenues  
by 2025

€83  
billion

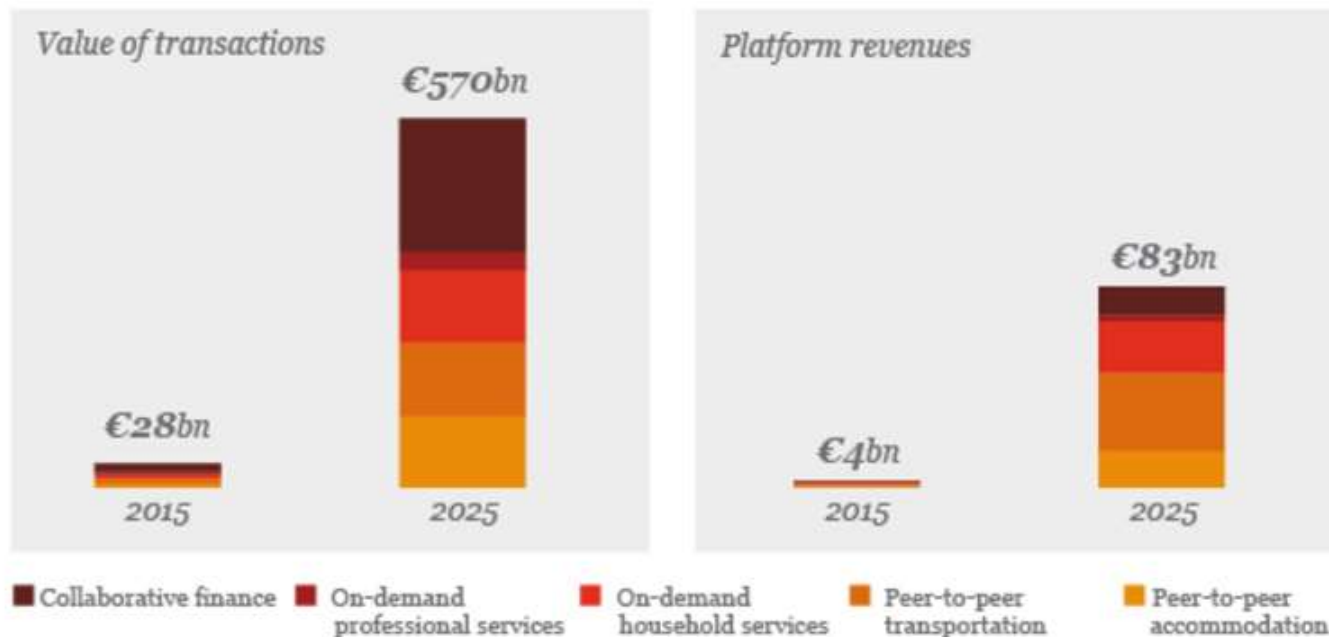
***The growth both in transactions and revenues has been very strong since 2013, and accelerated in 2015, as large platforms invested significantly in their European operations.***

***Revenues and total transaction value facilitated by sharing economy platforms in Europe, 2013-2015***



**Four out of the five sharing economy sectors could facilitate over €100bn of transactions on an annual basis, with only on-demand professional services still short of this milestone.**

**Revenues and total transaction value facilitated by sharing economy platforms in Europe by sector, 2015-2025**

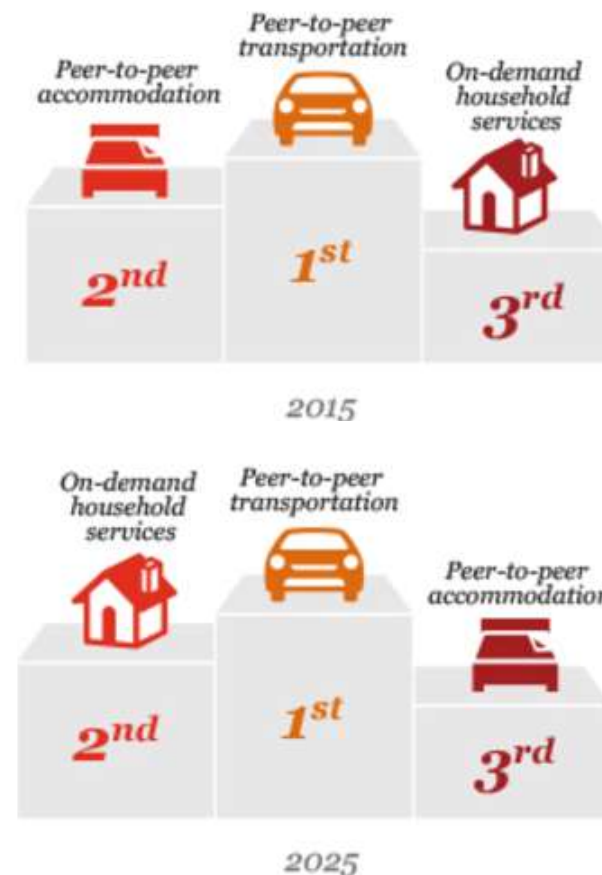




## ***Peer-to-peer transportation remaining Europe's biggest sharing economy sector***

Peer-to-peer transportation will remain the largest sharing economy sector across Europe through 2025, accounting for over 40% of total revenues.

On-demand household services will be the fastest growing of the five sectors, expanding its revenues at roughly 50% per year to 2025, and overtaking peer-to-peer accommodation as the second-biggest sharing economy marketplace by revenue.





## *Megatrends – 2017 predictions*

*Disruption in unexpected sectors  
and corporates adapting their  
business models*

---

## ***Trends for 2017 onwards***

### **Permeating new sectors**

2017 will see the innovation ripple across established sectors such as healthcare or retail.

High-value add industries may still be surprised by the sharing economy as well – Lawyers on Demand.

### **Silver surfing the sharing economy**

Digital natives, the early-adopters who powered the rise of the sharing economy, will start to take a back seat to the “silver surfers” - who could well drive the next phase of growth. The over 50’s have already become the fastest-growing user group for many platforms.

### **Corporates as sharing economy platforms**

Many corporates will become platforms themselves in order to tap this new source of talent.

PwC piloted the “Talent Exchange” within a subset of our US Advisory business.

*Branded experiences that drive emotional connection.*

## *Experiences increase contentment far more than purchases do.*

### **Experience economy**

Today, only one in two consumers agree with the statement that “owning things is a good way to show my status in society.”

Four in five consumers agree that there are sometimes **real advantages to renting over owning.**

Adults ages 18 to 24 are nearly twice as likely as those ages 25 and older to say that **access is the new ownership.**

*„I don't need a drill.*

*I need a hole in my wall.“*



## *Understanding the economy of trust*



**64%** of consumers say that in the sharing economy, peer regulation is more important than government regulation



**69%** say they will not trust sharing economy companies until they are recommended by someone they trust

Convenience and cost-savings are beacons, but what ultimately keeps this economy spinning—and growing—is **trust**.

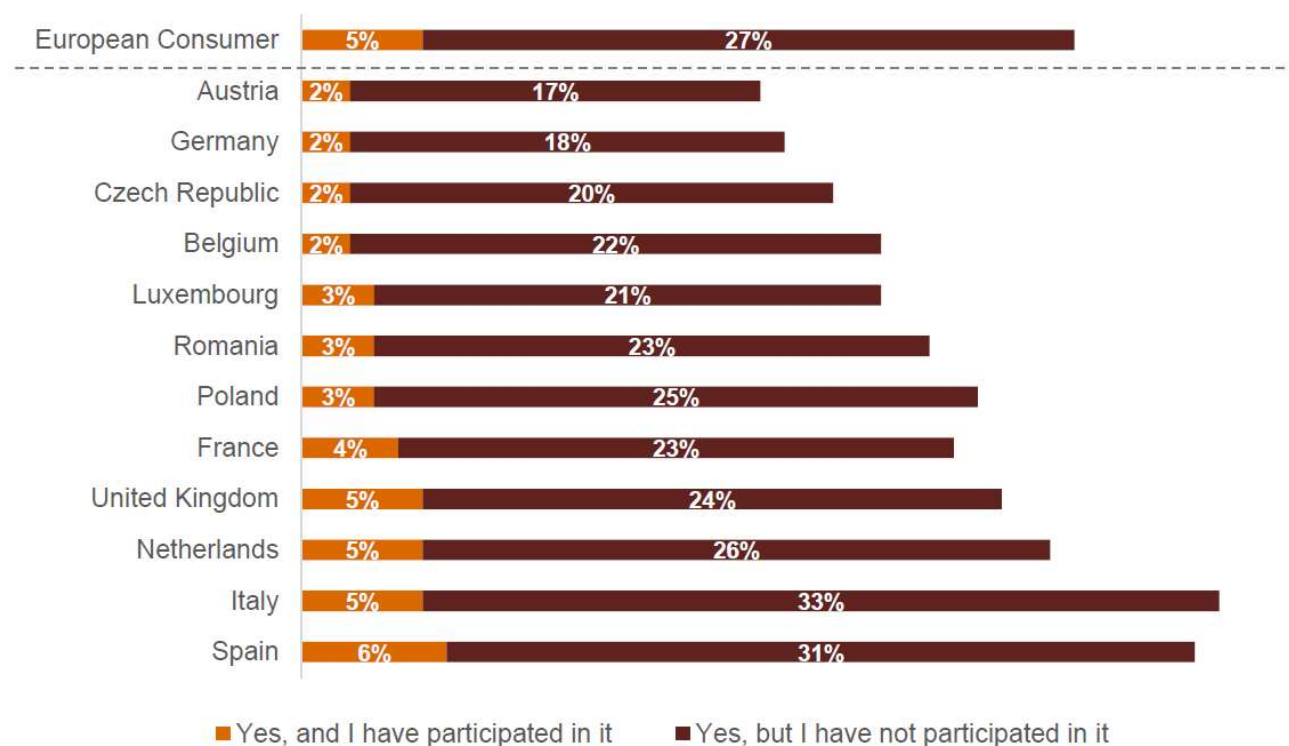
And yet our fundamental trust in peers has not changed markedly over the years.

Only 29% of consumers we surveyed said they trust people more today than they did in the past.

But if trust in individuals and institutions is waning or at best holding steady, **faith in the aggregate is growing**.

# *Participation in the sharing economy in Europe is growing, but it is still weaker compared to US.*

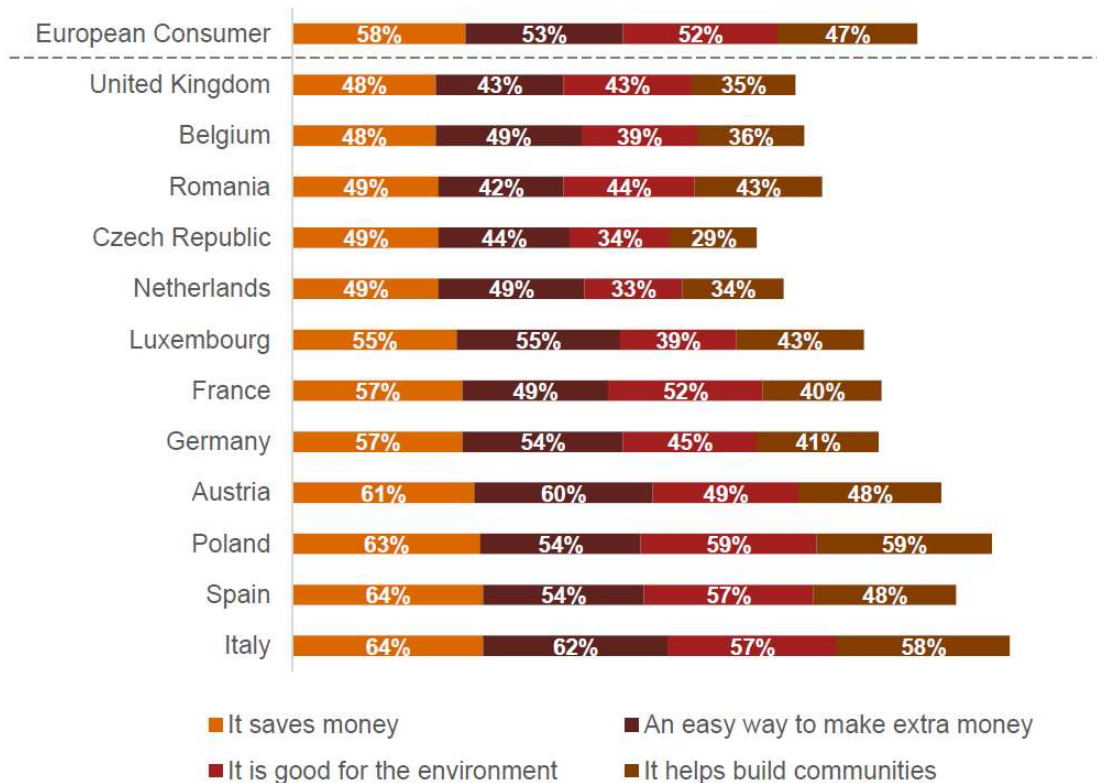
## Participation in the collaborative economy in Europe in 2015



Source: ING International Survey "The Sharing Economy 2015" (July 2015)

***Cost saving considerations are the main factor influencing participation in the sharing economy across member states.***

## **Factors influencing participation in the collaborative economy**



Source: ING International Survey "The Sharing Economy 2015" (July 2015)



---

# *Never settle for stable...*

Informace obsažené v této publikaci mají obecný charakter a neslouží jako zdroj odborného poradenství. Nedoporučujeme, abyste na základě těchto informací podnikali konkrétní kroky bez dodatečné odborné konzultace. Neposkytujeme žádná prohlášení ani záruky (výslovné ani učiněné mlčky), pokud jde o úplnost a přesnost informací obsažených v této publikaci. PricewaterhouseCoopers Česká republika, s.r.o., její členové, zaměstnanci a spolupracovníci, v rozsahu povoleném příslušnými právními předpisy, neodpovídají za jakékoliv následky způsobené případným jednáním, zdržením se jednání, spoléháním se na informace obsažené v této publikaci či jakýmkoliv rozhodnutím učiněným na základě informací v této publikaci.

© 2017 PricewaterhouseCoopers Česká republika, s.r.o. Všechna práva vyhrazena. "PwC" je značka, pod níž členské společnosti PricewaterhouseCoopers International Limited (PwCIL) podnikají a poskytují své služby. Společně tvoří světovou síť společností PwC. Každá společnost je samostatným právním subjektem a jednotlivé společnosti nezastupují síť PwCIL ani žádnou jinou členskou společnost. PwCIL neposkytuje žádné služby klientům. PwCIL neodpovídá za jednání či opomenutí jednotlivých společností sítě PwC, ani nemůže kontrolovat výkon jejich profesionální činnosti či je jakýmkoli způsobem ovlivňovat.