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Freedom and Flexibility

The relationship Deliveroo
riders have with the
labour market



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Key Findings

The purpose of this report is to offer insights into the relationship Deliveroo riders have with the labour market. The report's analysis and findings were informed by a survey of over 2,500 Deliveroo riders and a series of focus groups - held around the UK - with Deliveroo riders. The key findings from the research are:

- 1. Deliveroo riders are making an informed choice to shun traditional employment.** Riders who had previously been in traditional employment had little desire or intention to return to it - they prefer the flexibility and earning power that is enabled by riding for Deliveroo. Moreover, a recurring theme of the focus groups was that Deliveroo had given riders freedom from working in more traditional employment under 'overbearing' bosses.
- 2. Deliveroo riders value the flexibility of their work more than anything else.** For some, the flexibility enabled by riding means fitting work in around their social life. For others, flexibility means being able to see more of their children or dedicating more time to a hobby or passion. While the reasons why flexibility is important to riders vary, it is a fundamentally important characteristic for the large majority of those who choose to ride.
- 3. Deliveroo needs to attract and retain riders in a competitive market.** Riders choose to ride for Deliveroo because - for them - it has the best combination of earnings potential and functionality. When new competitors to Deliveroo enter the market riders will test them to make a comparison. If a platform came along that suited riders better, they would switch to using it immediately (indeed, many riders already ride for multiple platforms anyway).
- 4. Deliveroo riders are generally happy with their work environment.** Riders were asked about how well Deliveroo provided ten characteristics of the work environment - such as flexibility, opportunities to develop and the availability of work. On every characteristic a greater percentage of respondents were positive about Deliveroo's provision than those who were negative about Deliveroo's provision.
- 5. Deliveroo riders like that they get to keep fit and work locally.** When riders were asked in the survey what they liked most about riding for Deliveroo, 80% chose the option of "Flexible Work". The next most popular answer was "Active Work" (chosen by 39.5% of riders) and "Local work" (chosen by 38% of riders). These benefits are not often recognised - if at all - in the public debate about the gig economy.
- 6. Deliveroo riders have complex views on protections.** When prompted in the survey, riders showed a preference for Deliveroo to provide some form of holiday pay and sick pay. But it is not clear if riders crave protections, or if they have stated a preference for certain protections in an ideal world because they were asked to pick. Indeed, previous survey work by Deliveroo found three-quarters of riders unwilling to trade greater security if it meant less flexibility. When asked in the focus groups, the priority 'ask' of Government from Deliveroo riders was for Ministers to tackle street crime and lower the cost of insuring mopeds. When prompted on the topic of protections, riders suggested that it is a mistake to assume they had more security and protection in the traditional employment that they had experienced - where they felt they could be fired on a whim.

- 7. Deliveroo riders' biggest focus is improvement to the functionality of the app.** While riders who took part in the focus groups were largely indifferent to gaining greater protections, they spoke in depth about making tweaks to the app that could improve their riding experience. Riders want the app to unlock more productive time, by making collections more efficient. Riders want more information about their riding patterns, which they use to inform decisions about how and when to ride.
- 8. Deliveroo riders can typically earn more than they would in the alternative work available to them.** The money that riders make from Deliveroo tends to be better than what they could make – or are making – from other jobs (such as working in supermarkets, on factory floors and directly for takeaway restaurants). The financial rewards of riding are amplified for those who are younger, who would otherwise be earning less if on the minimum wage, which is £5.90 an hour for somebody between 18-20. The average Deliveroo rider earns over £10 per hour.
- 9. The gig economy is likely to continue to grow and become a more important part of the UK labour market.** Our conservative modelling suggests that the gig economy has the potential to more than double in size over the next five years, generating an additional £1.7 billion in **higher incomes for the economy, or around an additional £540 a year for 3.2 million workers.**
- 10. Gig economy platforms are allowing many people with other responsibilities who would struggle with a traditional job to earn extra income and transition back into the labour market.** Past internal surveys by Deliveroo have found that significant proportions of riders have other responsibilities, with almost half of riders (47%) students, 18% caring for children and 12% for parents. Our modelling of the potential growth of the gig economy suggests that in five years it could support an additional 400,000 income-earning opportunities for students and 1,300,000 opportunities for parents and carers.

1. Introduction

Why has this report been written?

The gig economy is an increasingly contentious topic. Its critics say that it can mean less security and lower pay for workers. Its proponents say that it offers a freedom and flexibility that is unavailable in traditional forms of employment, supporting new types of work. More broadly, the gig economy has become a prominent feature of wider debates about how we can ensure high quality ‘good work’ for everyone.¹

Despite forceful opinions on the subject, the evidence base on how the gig economy functions is relatively light and is still developing. In many cases, different reports do not even agree on what should count as a gig economy job, the number of workers in the gig economy, or what matters most to workers as part of ‘good work.’

Deliveroo is one of the leading platforms in the gig economy. According to data from the Department for Business, Energy and Industrial Strategy (BEIS), around 12% of those who worked in the UK gig economy used Deliveroo, while the similar categories of courier work (42%), transportation (21%) and food delivery services (21%) were among the most common gig economy activities.²

In this report, we look at the experience of Deliveroo riders in the gig economy, providing new evidence on the real experience of the gig economy of those working in it. We also analyse the potential of the gig economy to grow and contribute to the economy over the coming years.

Who will be interested in the research?

There were three objectives set for the research set out in this report:

- **To find out more about the relationship Deliveroo riders have with the labour market.** This includes looking at who Deliveroo riders are and why they ride for Deliveroo, what they would be doing for work otherwise, how their working conditions could be improved and what their plans are for the future.
- **To find out more about Deliveroo riders who have other big responsibilities and commitments in their life.** Do gig economy platforms make it easier to balance work with other responsibilities? Specifically, we looked at those riders who are studying, have children or care for somebody.
- **To contribute to the debate around the future of work.** The research sheds light on how a key subset of ‘gig economy’ workers views their working life. The research also informs a modelling exercise that illustrates what these views might mean for the future size and shape of gig economy within the labour market.

Policymakers, platform-based technology firms, unions, representative bodies and anyone interested in the UK labour market would find some value in reading the content of this report.

¹ BBEIS, February 2018, “Good work: a response to the Taylor Review of modern working practices”, <https://www.gov.uk/government/publications/government-response-to-the-taylor-review-of-modern-working-practices>

² BEIS, February 2018, “The characteristics of those in the gig economy”, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/687553/The_characteristics_of_those_in_the_gig_economy.pdf

What is the approach to the research?

The evidence gathering consisted of three exercises:

- **A survey of Deliveroo riders.** The survey fieldwork took place between 3 and 10 September, generating over 2,500 responses.
- **Five focus groups with Deliveroo riders.** The groups were held in London (x2), Manchester, Loughborough and Exeter across August and September 2018.
- **A modelling exercise.** Building off some of the themes from our survey and focus groups, we looked at what the future evolution of the gig economy could mean for incomes and jobs in the labour market.

What is the structure of the report?

The content of the following chapter is as follows:

- **Chapter 2** - A presentation of the survey results, which includes overall findings and a focused analysis of those who are students, parents or carers.
- **Chapter 3** - An analysis of the themes arising from the focus groups, exploring some of the focus group themes in more detail.
- **Chapter 4** - An analysis of what the wider implications from the survey and focus group findings mean for Deliveroo, the gig economy and the UK labour market as a whole.

2. Findings from the survey

Deliveroo riders completed a survey between 3 September and 10 September, generating 2,564 responses - this is the largest survey of its riders that the company has ever conducted. The headline descriptive statistics from the results showed that:

- 93% of respondents were male.
- 73% of respondents were between the age of 18-34.
- 84% of respondents were happy working for Deliveroo.
- 28% of respondents cared for either a child or a parent.
- 21% of respondents were students.³

The below table compares the Deliveroo sample with the sample used in a BEIS publication earlier in 2018, and with the UK population:

	Category	Deliveroo	Gig Economy	UK
Gender	Male	93%	54%	49%
	Female	6%	46%	51%
Age	18-34	73%	56%	27%
	35-54	25%	35%	34%
	55+	1%	10%	39%
Area	London	37%	24%	13%
	Out of London	63%	76%	87%
Student	Full-Time Student	21%	12%	7%
	Non-Full-Time Students (including Part Time students)	79%	88%	93%

The rest of this section sets out:

- The main conclusions from the rider survey.
- A focus on the sub-groups of carers and students in the sample.

³ The survey was conducted outside of term time for some students, so there is a possibility that they are under-represented in the sample. In previous surveys conducted by the company this number has been as high as 50%.

Main Themes

The choice between riding and traditional employment

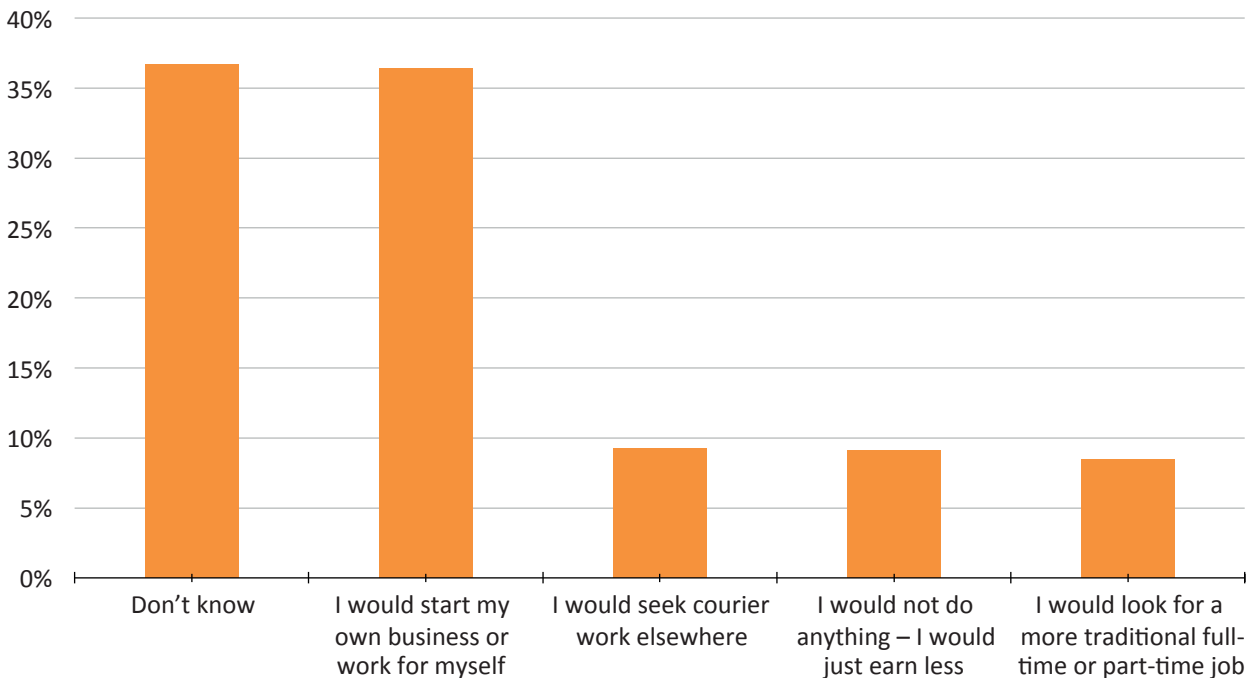
The survey results suggest that riders have the option to choose traditional forms of employment. When riders were asked what their reasons for riding for Deliveroo were, the answers with the lowest proportion of responses were:

- “I cannot find a traditional source of employment” (3.6% of respondents)
- “It is the only work I can find/I had no choice” (3.2% of respondents).

When riders were asked what they would do instead of being a Deliveroo rider, the answer with the lowest number of responses (around 8.5% of riders) stated that: “I would look for a more traditional full or part-time job”. The answer with the highest number of responses other than “Don’t know” is “I would start my own business or work for myself”. This suggests that those giving the answer want autonomy in work, rather than working for someone else. Even those giving the answer “Don’t know” tell us something - that they are not yearning for traditional forms of employment, and have no firm ideas on what they would want to do for work if they were not riding.

Chart One below shows how responses compare.

Chart One: Answers to the question: “If you could no longer work with Deliveroo, what would you do instead?”. Respondents could pick one answer only.



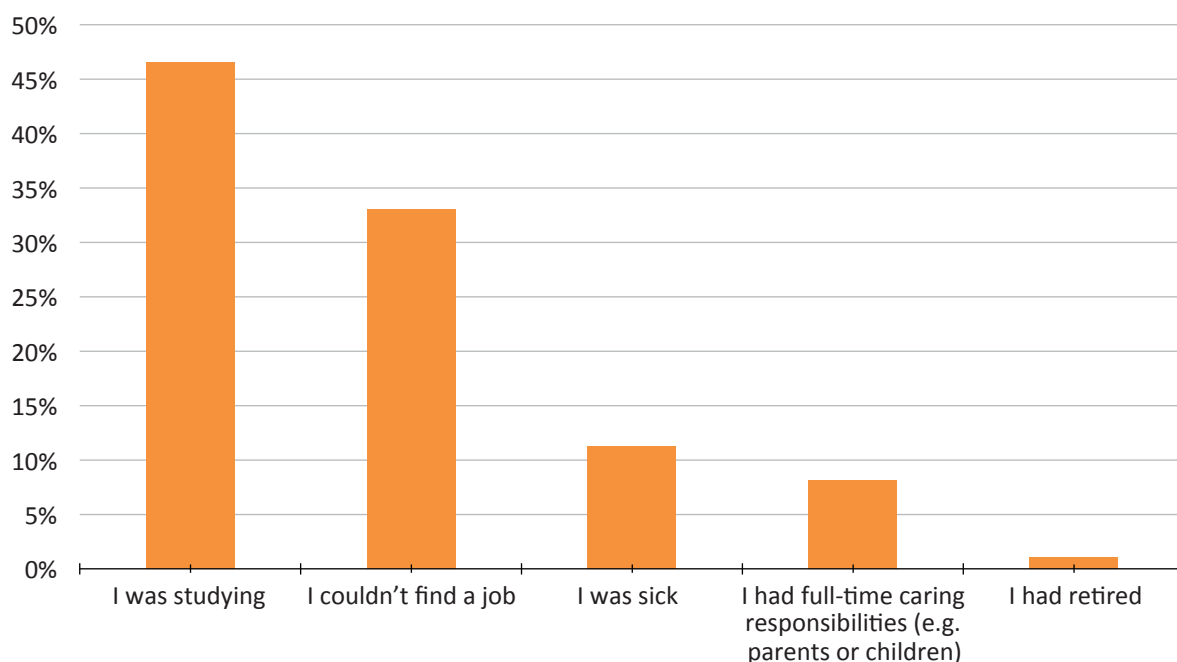
Riders were also asked to respond to the question: “How does riding with Deliveroo compare to your experience with other jobs?”. Respondents could answer with open text. A theme of the answers - something also brought out in the focus groups - was that riders chose to ride with Deliveroo because of negative experiences within traditional employment. A sample of these answers is as follows:

- “[Deliveroo is] a lot more relaxed. I’m constantly pushing myself to earn more, not because some boss is shouting at me and driving me crazy.”
- “I used to work for [a large supermarket chain] and found dealing with certain figures of authority very stressful and often bad for my self-esteem; many managers were rude and disrespectful.”
- “[Deliveroo has] no office politics or bureaucracy...No stress. No being treated unfairly or differently to other employees.”
- “It’s great that I don’t have to constantly be friendly and chippy and that there’s no boss looming over me.”
- “I have the best boss. His name is iPhone and he doesn’t get angry.”

The above findings show that riders are often choosing Deliveroo over traditional forms of employment (and indicate some reasons why riders are often choosing Deliveroo over traditional forms of employment). Other survey results show that Deliveroo may offer more labour market choice when traditional employment is hard to find.

Around half the survey sample had experienced a period of a month or more without work in the last five years. Chart Two, shows the reasons why they were out of work. A third state it was because they couldn’t find a job. It is reasonable to assume that now these respondents have ridden for Deliveroo, periods without work because of inability to find a job would be less likely (providing they live in a location where Deliveroo operates).

Chart Two: Reasons for period of one month of worklessness within the last five years. Respondents could pick one answer only.



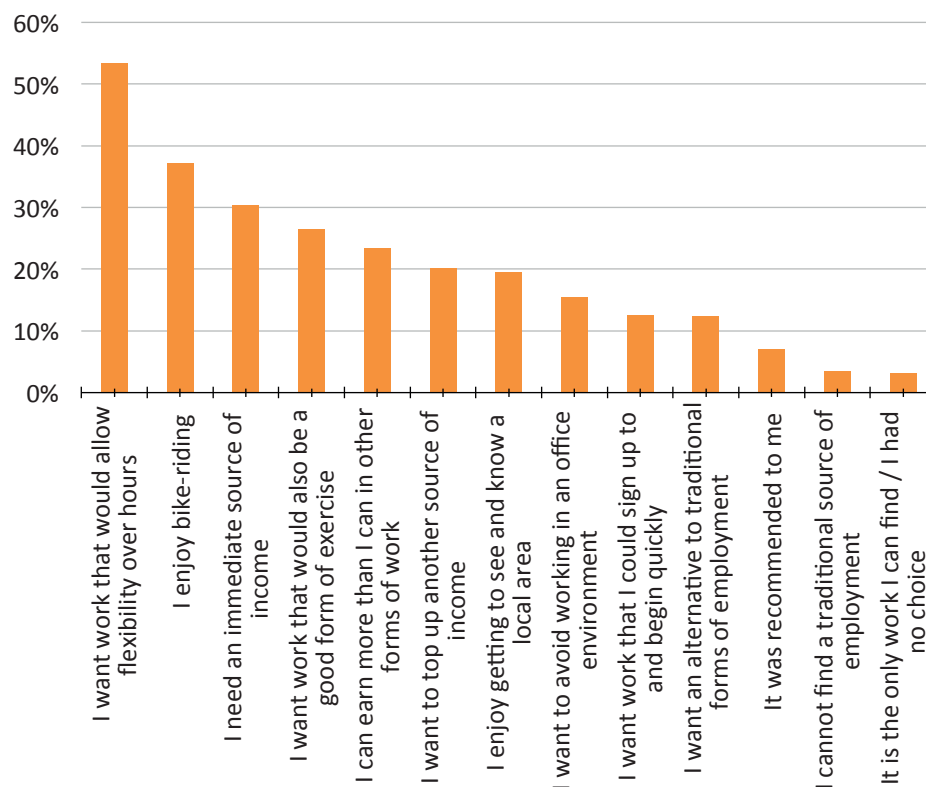
The value of flexibility

Flexibility is of fundamental importance to riders. This is true regardless of age or gender, whether the respondent is a student or not, and whether the respondent has a caring responsibility or not. The three charts in this section show that flexibility is a reason for working as a rider, that flexibility is a characteristic of the work most liked by riders and that riding is more flexible than the previous jobs riders have had.

The second most popular answer for why riders are currently riding for Deliveroo is: “I enjoy bike-riding”. The third most popular answer is: “I need an immediate source of income”. But riders valued these factors far less than flexibility.

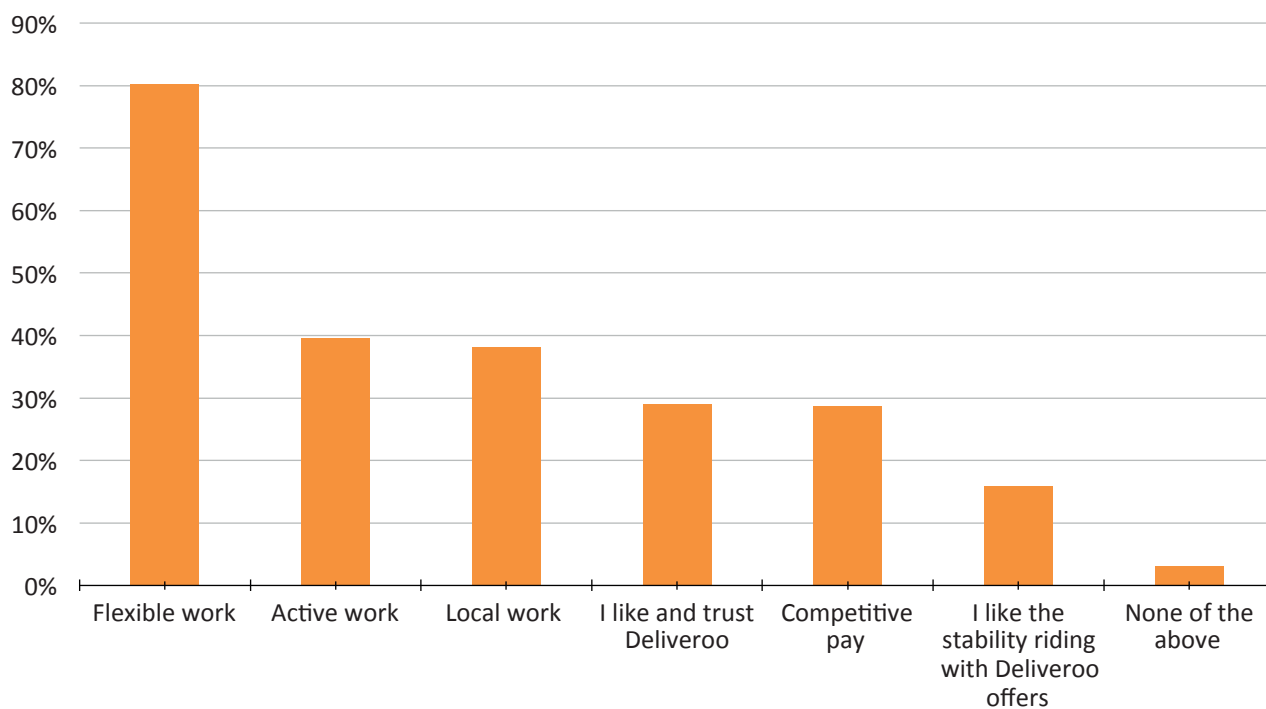
Chart Three shows the dominance of flexibility as a reason to ride for Deliveroo.

Chart Three: Answers to the question: “Why are you currently riding with Deliveroo?”.
Respondents could pick more than one answer.



The above results show the motivation for why riders are choosing to ride with Deliveroo - mainly because they want flexible work. But the flexibility of riding is not only a reason for riding, it is also something they really like once they are working with Deliveroo, preferring this characteristic of the work above all other options. When riders were asked what they liked most about riding for Deliveroo, over 80% chose the option of “Flexible Work”. The next most popular answer was “Active Work” (chosen by over 39% of riders) and “Local work” (chosen by over 38% of riders). These findings are largely absent from the current public debate about the gig economy. Chart Four shows the range of answers in full.

Chart Four: Answers to the question: “Which of the following do you like most about riding with Deliveroo?”. Respondents could pick more than one answer.

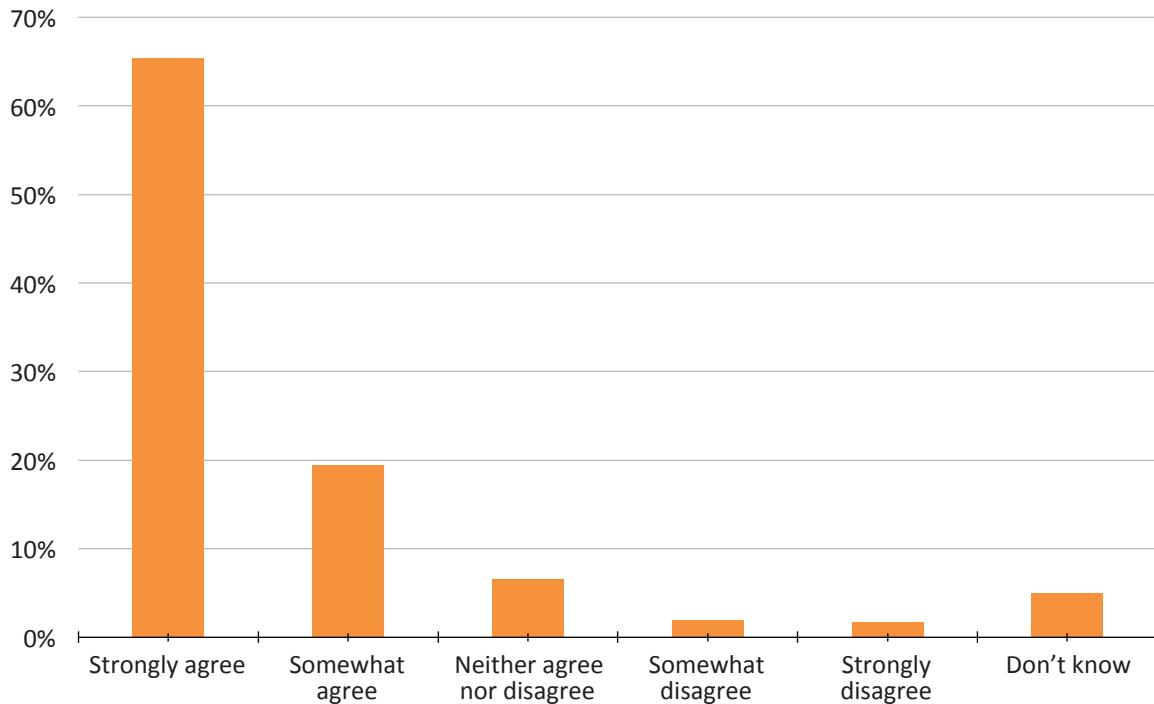


Riders also see the flexibility of riding as being a positive in comparison to previous employment they had had. Over a quarter of those who responded to an open text question asking how riding for Deliveroo compared with other jobs mentioned flexibility. Some riders’ answers made broad reference to how flexibility enabled them to fit work in around other things in life. Other answers were more specific. One stated that the flexibility of riding is supporting them to build a career in art; another stated that the flexibility of riding helps them look after their young child. A few direct quotes from the survey are:

- *“It’s nice to have such flexible work, meaning I can change plans very easily to fit other things I have to do”.*
- *“The flexibility is key, it means I can visit my boyfriend without worrying about booking time off and being able to come back to a job”.*
- *“Amazing with flexibility and gives the ability to work around my hectic family”*

This finding was reflected in a question which asked how riders viewed flexibility of previous jobs in comparison to Deliveroo. The range of answers is shown below in Chart Five. Almost 85% of respondents agreed that Deliveroo is more flexible than their previous job.

Chart Five: Answers to the question: “Deliveroo provides more flexibility than previous or other jobs”.



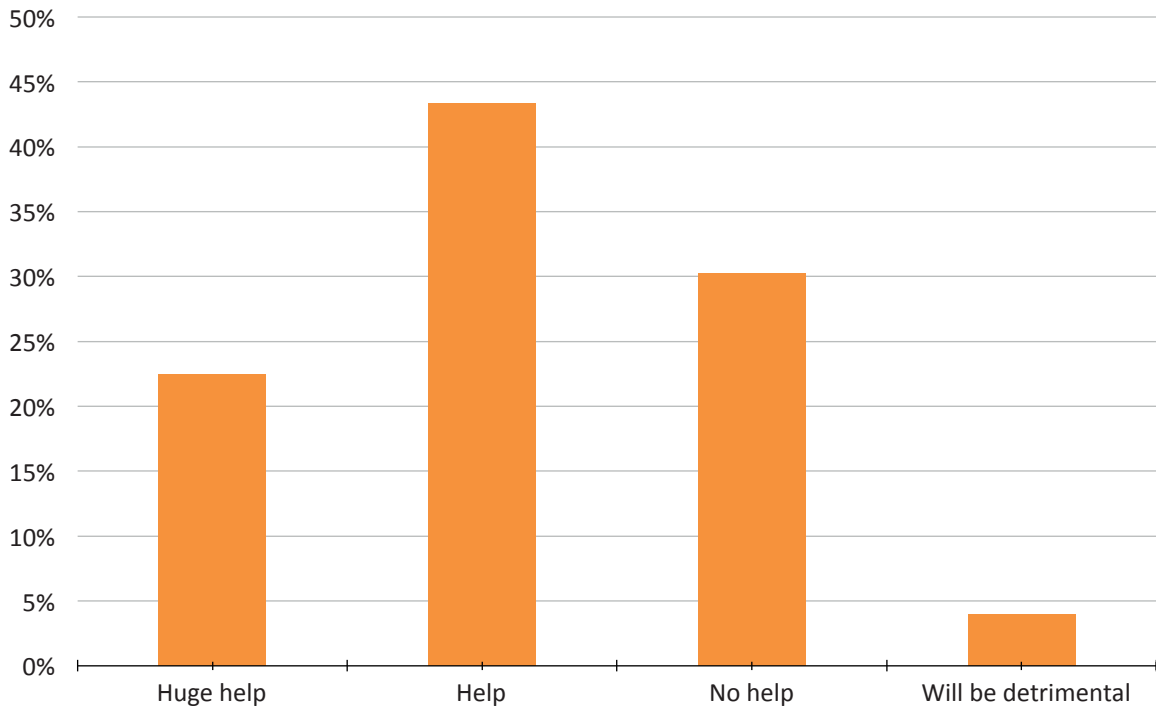
The purpose of riding - and what it means for future employability

Riders fit work around other things that are important to them in life. Riders were asked how they saw working for Deliveroo:

- The top answer – given by 43.3% of riders – was that riding for Deliveroo was a way to make extra money to support daily life (such as socialising and hobbies).
- The second most popular answer was the 40.8% of riders that felt that riding for Deliveroo was “A way to keep fit while earning money”.
- The third most popular answer was the 34.4% of riders who said it was being “A way to support a long-term goal outside of Deliveroo”.

These results might suggest that - for some riders at least - riding for Deliveroo is a transient form of income to fund other interests in life. But riders also see some auxiliary benefits - just under two-thirds of riders also suggested that riding for Deliveroo would help their future employability (see Chart Six).

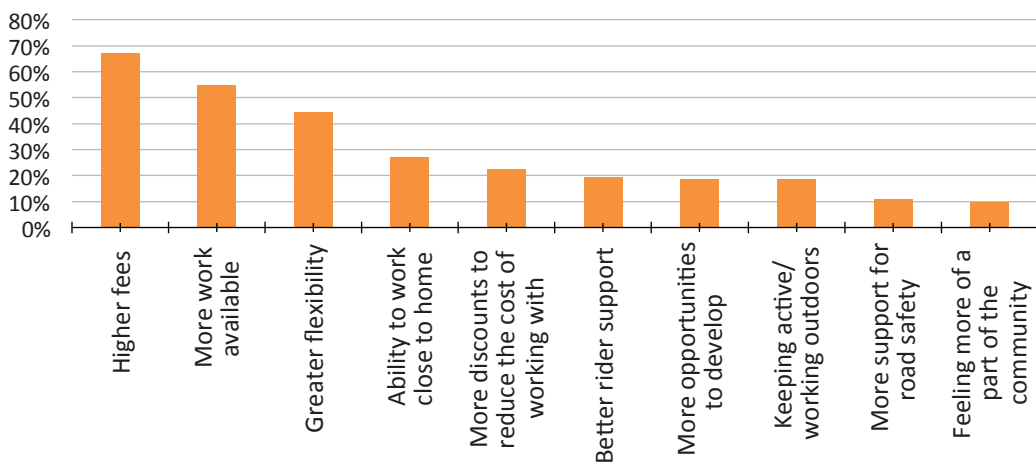
Chart Six: Answers to the question: “How do you think your experience riding with Deliveroo will impact on your future employability?”



The work environment for riders

Riders are positive about their work environment. Riders were also asked which characteristics of the work environment was most important to them, with high fees and work availability coming top of the list. Chart Seven, below, shows the relative importance of each work characteristic to riders.

Chart Seven: Which work characteristics are most important to you?



Riders were also asked how well Deliveroo does at providing these characteristics of the work environment. The results showed that riders - on balance - think that Deliveroo does well on all the characteristics of the work environment that they were asked about. In other words, on every characteristic of the work environment a greater percentage of respondents were positive about Deliveroo's provision than those who were negative about Deliveroo's provision. For example:

- 45% of riders thought Deliveroo does well on providing high fees, compared to 19% who thought Deliveroo does not do well.
- 56% of riders thought Deliveroo does well on providing work availability, compared to 17% who thought Deliveroo does not do well.
- 84% of riders thought Deliveroo does well on providing flexibility, compared to 5% who thought Deliveroo does not do well.

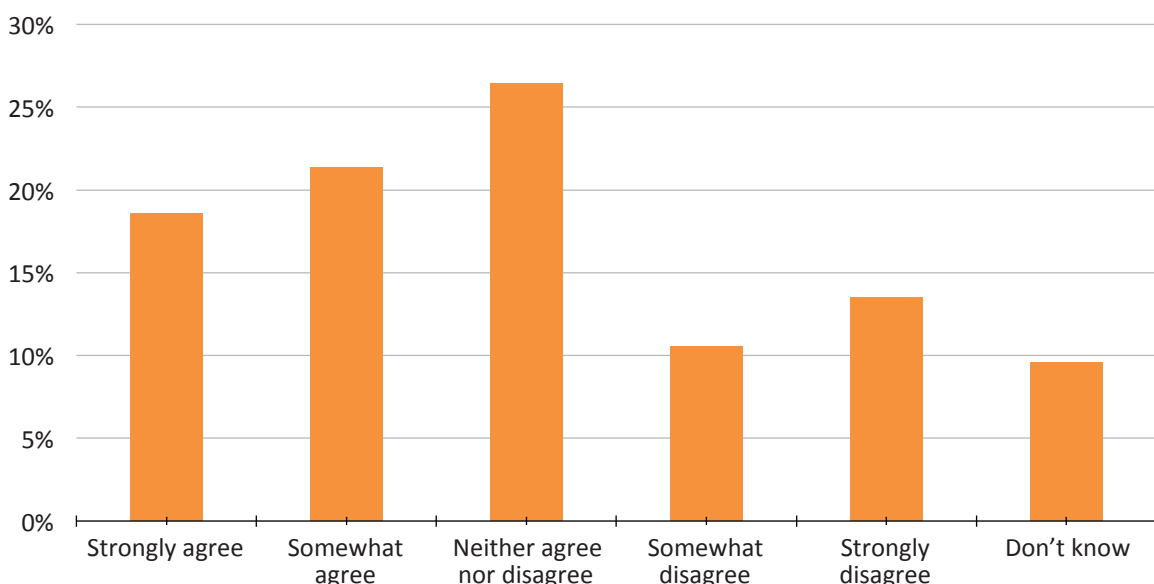
The rider view on protections

Riders were asked what they would prioritise if Deliveroo were able to offer better protections for their riders. The clear priorities were pay set aside for holidays (47% of respondents), pay for sickness (44%) and discounted vehicle insurance (36%). Of the other options on protections - such as access to a pension and maternity/paternity payments - no more than 24% of respondents stated a preference for Deliveroo to offer them.

Despite the results showing clear priorities for the protections that riders want, the most popular answer - "pay set aside for holidays" - was still only given by less than half of the respondents. This is interesting in the context of the focus groups - described in the next chapter - which found riders to be largely indifferent to gaining greater protections. Moreover, riders tended to take the view that they had chosen non-traditional employment and understood it meant the protections were different to those found in traditional employment.

Riders were also asked if they thought that Deliveroo provided more protections than past or other jobs (See Chart Eight, below). 40% agreed that Deliveroo did provide more protections. 24% disagreed. 36% neither agreed or disagreed or didn't know.

Chart Eight: Responses to the statement: "Deliveroo provides more protections to its riders than my past or other jobs".



Again, the answers to this question are interesting in the context of the focus group discussions. Some riders in the focus groups suggested that it is a mistake to assume that there was more security and protection in the traditional employment that they had come from - where they felt they could be unceremoniously fired on a whim. It is impossible to know if survey respondents who agreed that Deliveroo offered more protections than their previous employment were referring to this. It could also be that these survey respondents came from non-traditional precarious employment, and see Deliveroo as offering greater security.

Survey Subgroups

One reason for conducting this research was to understand more about two groups of riders that are known to use Deliveroo because the work better suits their circumstances:

- **Those who have caring responsibilities** - for instance, for children or for parents.
- **Those who are studying** - whether they are studying part-time or full-time.

The below sections describe how these two groups responded to the survey

Deliveroo and Carers

Carers estimate spending around 34 hours a week on caring responsibilities, and about 24 hours a week riding. Some key findings related to carers were:

- For those who care for both parents and children (albeit only 110 of the entire sample), 62% view greater flexibility as something important to them, compared to only 42% of the non-carer sample.
- Carers of all capacities are more likely to regard Deliveroo as a huge help for future employment, with 45% of those who care for both children and their parents regarding it as such, compared to only 18% of those who are not carers.
- 30% of carers rate their happiness at Deliveroo as 10/10 compared to 19% of non-carers who rate their happiness at Deliveroo as 10/10.

Deliveroo and Students

Students estimate spending around 26 hours a week on studying, and about 14 hours a week riding. Some key findings related to students are:

- 68% of full-time students claimed flexibility over hours as a key reason for riding for Deliveroo, and 59% of part-time students, compared to 49% of the non-students.
- 89% of full-time students liked the flexibility offered by Deliveroo (compared to 77% part-time and 78% non-students), and 53% liked the active work (compared to 35% of Part time, and 36% of non-students).
- Full-time students are considerably more likely to regard Deliveroo as a way to make extra money (62% vs. 36% Part-Time (PT), 38% Non-Students (NS)), and a way to keep fit while earning money (62% vs. 35% PT, 35% NS).
- Both full-time and part-time students regard Deliveroo as a way to support a long-term goal outside of Deliveroo (45% for both vs 30% NS).

3. Findings from the focus groups

Five focus groups, each with four or five Deliveroo riders as participants, were held over August and September 2018. Each group was moderated by a Public First consultant and sessions lasted around an hour.

The themes from the focus group discussions add another layer of understanding to the conclusions made from the survey.

Characteristics of focus group participants

Two of the groups - in London and Manchester - consisted of parents. The riders in these groups were all first or second-generation immigrants, male, aged between 20 and 40 and had delivered on mopeds, typically for 2-3 years. All riders used other delivery platforms - such as Uber Eats - to make money as well.

The other three groups - in London, Loughborough and Exeter - consisted of students, mainly taking undergraduate courses but with some taking college courses. The riders in these groups were mostly in their late teens/early twenties, with two of the 15 participants being female. The student riders had been riding for six months to two years, predominantly on push bikes. Most riders used other delivery platforms in addition to Deliveroo.

Across both sets of groups, participants had come to ride for Deliveroo via different routes. Some had been encouraged to find out about Deliveroo via marketing campaigns – through both social media and leafleting campaigns. Others had heard about Deliveroo from friends, or from working in some other form of delivery work.

An important piece of context is the two types of zone that a Deliveroo rider can currently operate in – “Free Login Zones” and “Booking Zones”. The Manchester and Loughborough focus groups were held with riders who largely only operated in the latter category. The distinction between the two zones is as follows:

- **Free Login Zones.** Riders can login whenever they like and are paid per delivery. The riders who took part in the London, Loughborough and Exeter focus groups all delivered in Free Logon Zones.
- **Booking Zones.** Riders can book the slots they wish to ride in advance, or freely login if there is live availability and are paid per delivery. Slot availability for the week ahead is released on Mondays. If a rider’s “statistics” are high, they get earlier access to book slots. The strength of the statistic is based on metrics like attendance at booked sessions (or cancelling with 24 hours notice) and rider participation in peak hours.

Themes from the groups

The following themes describe the focus group discussions:

- Flexibility and financial gain – why Deliveroo riders keep riding.
- Choice and transience – riders' relationship with the labour market.
- Polishing the platform – what riders want from Deliveroo.

Following the description of the themes there are some further conclusions.

Flexibility and financial gain – why Deliveroo riders keep riding

Participants were asked why they did the type of work that they did. The main reasons they gave were that the work is highly flexible and pays relatively well (with a sense of independence, keeping fit and working outdoors being secondary, but often-quoted). Participants were also asked if they would continue with this type of work in the future, with the answers tending to vary between riders who were students and parents. These findings are unpacked with the following conclusions:

- **Financial reward is a big incentive to ride for Deliveroo.** Most participants indicated that the money they could make from being a Deliveroo rider was significantly above what they could make – or were making – from other jobs (such as working in supermarkets, on factory floors and directly for takeaway restaurants).

Two of the Manchester group had been riding part-time with other full-time jobs before it became clear they could earn much more by focussing on riding with Deliveroo. One of the participants said that riding for Deliveroo had even allowed him to meet the earnings requirements for a spousal visa so that his wife could live with him in the UK. Some of the parent riders in London talked about how the earnings from Deliveroo meant that they could send money to family members in their previous country of residence (*"We need to send money back to family because they all depend on us"*, male rider, parent, London).

The financial rewards are amplified for those who are younger, who would otherwise be earning less if on the minimum wage, which is £5.90 for somebody between 18-20 (*"Pay is so good for students"*, female rider, student, Exeter; *"When I tell people how much I earn in an hour, they are like, 'What!?'"*, female rider, student, Exeter).

- **Flexibility allows riders to get more from other aspects of life.** Flexibility was repeatedly raised by participants as an important benefit of riding for Deliveroo. But the reasons riders gave for wanting flexibility were many and varied.

Some riders gave examples of how flexibility allowed them to indulge an interest or hobby. A rider in Exeter said that riding for Deliveroo helped meet her training commitments for the England national hockey team. A rider in London said that he could dedicate more time to his passion of reggae music (*"I work in the evening and go to the studio in the day, and go to college on Wednesdays"*, male rider, student, London).

Some riders gave examples of how flexibility benefitted their studies or working life. Students talked about how riding fits around their course commitments (*“If I’ve got an exam or coursework then I can work around it”*, male rider, student, London). Rather than having to turn up to a job at a particular time – and ultimately being fined or fired by being late or not turning up – riders could decide on when and for how long they worked. (*“For another company, we need to be there on time, and we need to leave on time. That’s the problem. Sometimes they can ask us to do overtime and we don’t want to do it”*, male rider, parent, London).

Some riders gave examples of how the flexibility of Deliveroo gave them more leisure time. Riders often worked long hours for several days in a row, but would then take several days off to go on holiday. Or they would simply log-out of the system to rest or to socialise. In the London group of parents, two of the riders had become friends through working with Deliveroo and were planning on taking several days off to visit Istanbul for a holiday – again they stressed this was only possible because of flexibility and pay. Some riders gave examples of how flexibility benefitted their home and family life. One of the parents in London talked about how the flexibility of Deliveroo meant he could have lunch with his daughter – currently studying for GCSEs – every day. (*“I can earn good money in a few hours... I can give time to my family and spend lunchtime with my family”*, male rider, parent, London).

Another benefit of flexibility for some parent riders in London was that they were able to ride in a very defined geographic location. The downside of driving a cab was, for example, that you might pick up a fare near your house when you were preparing to finish for the evening and then end up all the way on the other side of London – or beyond. With Deliveroo, people were grateful they could work in a set number of postcodes that they knew well (*“I don’t want to go too far away from the area I work in”*, male rider, student, London). Some riders also said this helped with safety – they got to know areas to avoid, and they even got to know areas where CCTV was not working.

- **Riders tend to like the working conditions.** A number of riders said they liked the working conditions of being a Deliveroo rider. They admitted that bad weather could be a problem – and that they also had to keep their wits about them when visiting areas that were known to be street crime hotspots (particularly in London and Manchester) – but many positively contrasted being able to ride around their city (*“I’ve worked in 20 different zones. I like to sightsee with Deliveroo”*, male rider, student, London).

A few riders said they liked the work as it forced them to get fitter (*“Physically I used to have a lot of weight... Since I’ve been working [with Deliveroo] I’ve been fitter... I don’t need to go to the gym anymore... I go up and down, up and down, they keep me fit... I’m more physically strong and ready to go”*, male rider, parent, London; *“I do rowing [for the university club] so keeping fit is a big part of it for me”*, male rider, student, London).

Some riders also suggested that the working conditions were not for everyone – it required fitness and self-motivation that not everyone has (*“It targets people who want to earn money and keep fit”*, female rider, student, Exeter).

- **Riders do not necessarily see riding as long-term, but it tends to suit them for now.** When asked about how long riders expected to ride for there was a mixed response.

London students viewed riding for Deliveroo as temporary until their circumstances changed.

Loughborough students all said they would ride until the end of their degrees. Exeter students suggested

that they would think about their job and career once they had finished their course, but some said they would continue riding for Deliveroo if only for a few hours a week.

Most parent riders said they were happy to commit to riding for the near future at least. Few had fixed plans, but a number of riders talked about their desire to set up their own businesses – some had done this in the UK or in their previous country of residence (*“This job is good to earn some money and save some money and to start a new business, that’s my thinking”*, male rider, parent, London).

Choice and transience – riders’ relationship with the labour market

Participants had not thought in any depth about the issues that dominate the public debate around the gig economy. That said, riders clearly recognised that they were working outside of what would be regarded as traditional employment. The message was that riders chose not to return to traditional employment, had no loyalty to specific gig economy platforms and did not see government regulation as a way to improve their working conditions:

- **Riders were extremely averse to the idea of returning to traditional employment.** Participants were asked what they would be doing if riding for Deliveroo was not available to them (and, more broadly, what they would be doing if similar types of work were not available to them). The large majority said that they would go back to what they were doing before – such as being employed stacking shelves, washing dishes or delivering pizzas or Chinese food. But when asked how they would feel about going back to their previous type of employment, the reaction was overwhelmingly negative (with some riders shuddering at the thought). The negative reaction was driven by riders’ previous jobs being inflexible, having lower earnings potential and often involving being ordered around by a line manager (*“If Deliveroo didn’t exist we would be doing something we don’t like”*, male rider, parent, Manchester).

A key factor in shunning traditional employment was the gain of independence and control. A number of riders referred to themselves as being their “own boss”. The parent riders in London talked about how they had worked long hours at the complete discretion of their employers, having to eat their meals in cars or walking around because their employers were driving them so hard (*“I’m my own boss – people can’t push me”*, male rider, parent, London; *“I can’t work for someone else; here, I feel like I work for myself... I find Deliveroo more easy and more convenient for me”*, male rider, parent, London; *“[Riding is a] more flexible job than other jobs I’ve occasionally worked in like a chip shop or a restaurant. They’d... call you in all the time and you’d have to go. You couldn’t just cancel your shift if you want to.”*, male rider, student, Loughborough).

- **Riders would stop riding for Deliveroo immediately – and without question – if a better platform-based alternative became available.** Most participants would regularly log into and ride for other delivery platforms such as Uber Eats or Stuart. They mostly use these platforms when Deliveroo demand was low (*“I only use the [other apps] when it is quite quiet, otherwise I’ll just choose Deliveroo”*, male rider, student, Exeter). All riders were knowledgeable about the pros and cons of each alternative platform in comparison to Deliveroo. For example, on Deliveroo a rider can turn down a delivery job with no penalty should they want to, which is not a feature of some competitor platforms.

When a new competitor enters the market, riders engage with them and as a matter of course, testing them to see if they have a better offer than Deliveroo (*“When companies first come on the market they spend loads of money to get riders”*, male rider, student, London). Indeed, some participants could

list several courier and delivery companies that had been and gone, but that they had engaged with. Ultimately, they stuck with Deliveroo because it had the best combination of availability of work and ease of use (*“Two changes that Deliveroo made that mean I do less [with other apps]. Ease of switching between zones and being able to see where the customer was”*, male rider, student, London; *“Deliveroo is my favourite – it is a lot more user friendly than the other apps”*, male rider, student, London).

It should be noted that the functionality of the Deliveroo platform in comparison to competitors was referenced in every focus group (and even dominated an entire 45 minutes of one of them). The topic was of far more interest to riders than when they were asked about the issues dominating the public debate, such as job security (where participants offered minimal and ambivalent responses to the questions). It also served as a reminder to Deliveroo that they had to stay one step ahead of their competitors (*“I don’t want to go too far away from the area I work in, so I will do Uber Eats in my area as well”*, male rider, student, London).

- **Riders see no merit in government intervention.** Participants were asked if the Government should act to address any issues they had with gig economy type work. Most riders didn’t think there was anything that could – or should – be done. Instead, riders were mainly concerned about the Government doing more to keep them safe from street crime and reducing the costs of insuring their vehicles.

Riders said experienced downsides to their work – such as difficult customers and mistakes with orders that made riding time less productive. But they were generally happy doing what they were doing, and didn’t want government interference to be to the detriment of the many positives that they experienced riding for Deliveroo. Some also took the attitude that people enter the riding job knowing what they are signing up for; if they don’t like that then they can something else.

Nevertheless, there were two specific issues that participants felt government could potentially help with. The first is safety. Moped riders in Manchester felt that Deliveroo riders were increasingly targeted for theft (in other parts of the country push bike riders also raised concerns about theft, but to a far lesser degree). The moped riders felt that the police did nothing to help when an incident occurred (*“Police don’t chase the motorbike thieves”*, male rider, parent, Manchester). The second – related to the first – is insurance. Delivery riders felt the cost to insure their scooter was too high.

Polishing the platform – how the riding experience could be improved

Participants were asked how riding for Deliveroo could be made better for them. With reference to the final point of the previous section, the answers barely touched upon a desire for further protections. Instead, the answers tended to focus on how they interact with the app and with Deliveroo. To note, Deliveroo will use these findings to learn how the rider experience can be improved:

- **Riders want platform improvements to unlock more productive time.** Participants liked the fact that the financial rewards for riding are commensurate to effort – the more they put in, the more they get out (*“If you work hard you make money. If you don’t work hard you don’t make money”*, male rider, student, London). This made riders acutely aware of the frustrating things that reduced their productive time. As a result, several put forward ideas for improving the functionality of the app. Examples of the ideas that were put forward include:
 - Enabling riders picking up at the same restaurant to switch deliveries if it were mutually beneficial to save time.
 - Making it easier for the rider to have the ability to tell customers when they are close by so that there is less waiting around (*“...sometimes you are waiting ages for someone to come down the stairs”*, male rider, student, London).
 - Alerts in the app that tells riders if there are errors in the order, such as checking if postcodes match with street names in delivery addresses (*“... sometimes I have had the wrong post code and gone to the wrong part of town”*, female rider, Student, Exeter).
- **Riders use the information provided by Deliveroo to make decisions about their riding patterns and to motivate them – they want more of it.** One rider asked for more detailed information on how many deliveries he had done, i.e. a double-drop off only counted as one trip in their riding data. Others asked for more granular information when they were made aware of peaks in demand – this would help to determine if it was worth cycling to a particular zone.
- **The quality of communication between Deliveroo and its riders is patchy.** In two groups, some participants mentioned the fact that the rider helpline was staffed with people who couldn’t speak English very well (although, it should also be noted that some participants responded to negative anecdotes about the rider helpline with positive anecdotes). Separate groups also mentioned that email communication with Deliveroo can be a frustrating experience.

Several riders felt the response they received when contacting Deliveroo didn’t always address the issue they’d raised directly. In Loughborough, the riders suggested a dedicated local or regional representative who could be contacted by phone.

- **There is an opportunity to help riders with their future employability.** Some participants felt that more could be done to provide training. For instance, a student in London saw potential for a scheme that provided a route from being a rider with Deliveroo to being an employee for Deliveroo in its head office. A rider in Manchester noted that he had received an email from Deliveroo promoting skills courses, which he intended to look into as he eventually wanted to set up his own business.

4. Deliveroo, the gig economy and the UK's labour market

This chapter sets out some conclusions on what the survey and focus group findings mean in the context of the gig economy and the UK labour market. It does this by:

- Comparing and contrasting the findings of this research with other research on the gig economy.
- Setting out the findings of this research in the context of the UK labour market.
- Presenting some illustrative modelling of what the results mean for the future size of the gig economy and certain groups within the labour market.

Most workers in the gig economy are highly satisfied with the form of the work, and the trade-offs it involves

The loaded language used by some critics of the gig economy to describe the working environment of its workers is at odds with the findings of the survey and focus groups.

The riders we spoke to were typically happy with their work - they have some minor gripes, but are ultimately content with the work they do. We did not find many riders who had been 'forced' to take gig economy work because they could not find or would prefer more traditional employment – instead, riding for Deliveroo was overwhelmingly a positive and informed choice.

This is in line with recent research for BEIS, finding that the majority (53%) of those working in the gig economy were very or fairly satisfied with their experience – and in food delivery, 65% were overall satisfied.⁴ Other research from Oxford University and Uber, finds that, *“Uber drivers report higher average levels of life satisfaction and worthwhileness in the ORB survey compared to employed and self-employed London workers... [there is] little evidence to suggest that the typical London driver has turned to the gig economy due to the absence of jobs in the conventional labour market”* and that, *“...many drivers transitioned out of blue collar or service jobs with presumably low levels of pay”*.⁵

Similarly, most research on self-employment more broadly finds that self-employed workers do not suffer from any worse job satisfaction – and in the short term, the transition often creates a significant boost.⁶ Other BEIS research has found that “self-employment is generally a positive choice”, and of those that do choose it instead of employment, the vast majority (84%) believe that their life is better off overall.⁷

For policy makers, full-time gig economy work often does well on four of the five pillars of 'good work' that have been set out by the government: strong worker satisfaction; good pay; wellbeing, safety and security; and high autonomy. Looking forward, policy makers and platforms should consider what steps we can take to boost the remaining pillar, participation and progression, and what this means in a gig economy context.⁸

⁴ BEIS, February 2018, “The characteristics of those in the gig economy”, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/687553/The_characteristics_of_those_in_the_gig_economy.pdf

⁵ Oxford Martin School, October 2018, “Uber Happy? Work and Wellbeing in the ‘Gig Economy’”, https://www.oxfordmartin.ox.ac.uk/downloads/academic/201809_Frey_Berger_UBER.pdf

⁶ Georgeliss and Yusuf, October 2016, “Is becoming self-employed a panacea for job satisfaction? Longitudinal evidence from work to self-employment transitions”, <https://onlinelibrary.wiley.com/doi/full/10.1111/jsbm.12292>

⁷ BIS, February 2016, “Understanding self-employment”, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/500305/understanding-self-employment.pdf

⁸ BEIS, February 2018, “Good work: a response to the Taylor Review of modern working practices”, <https://www.gov.uk/government/publications/government-response-to-the-taylor-review-of-modern-working-practices>

Independence and flexibility are valued across the gig economy

In our survey data, we found that flexibility over hours was the single most important reason why riders chose to work with Deliveroo.

This corresponds (and even outperforms) with the findings of many previous studies into the gig economy and self-employment, which have demonstrated the importance of flexibility and independence to those working within it. BEIS research finds that 58% of gig economy providers are satisfied with the independence of their work, and 56% with its flexibility.⁹ Other work by the Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA) has identified ‘flexibility’ as significant pull factor for those in the gig economy, with 63% agreeing that it allows them to have more control and freedom over when they work.¹⁰ Research by Chartered Institute of Personnel and Development (CIPD) finds 50% of gig economy respondents agreeing that, *“People working in the gig economy make a decision to sacrifice job security and workers’ benefits for greater flexibility and independence.”*¹¹

This suggests that any future policy reforms to labour market and welfare rules that would impact the gig economy and on-demand working should seek to avoid compromising the flexibility that has attracted many workers to choose it. If flexibility were to be limited as a result of policy change it risks fewer people having options in the labour market.

This suggests that the challenge from a public policy perspective, therefore, is to explore how security can be increased for those in the gig economy, whilst retaining the flexibility that attracts people to it, while also exploring how independence and flexibility can be increased in traditional forms of employment.

The gig economy is largely additional to, rather than a replacement for, more traditional types of work

While much of the narrative around the gig economy treats it as a substitute for traditional employment – and worries about its lack of security or traditional benefits – our survey finds that those riding for Deliveroo because they cannot find traditional forms of work are rare. In practice, the majority of gig economy work acts as an income top-up for those with another full-time job or other responsibilities, rather than acting as their main activity.

This is reinforced by BEIS research finding that two-thirds (65%) of gig economy workers earn less than 5% of their total income from gig economy work, with 32% claiming the additional income was extra “on top of my regular work” and 19% “a source of income while I focus on something else.” (However, those who do use gig economy work as their main source of income were particularly satisfied with it – with 90% reporting that they were very or fairly satisfied.)¹² Other work by CIPD finds that 58% of gig economy workers have permanent employee jobs elsewhere, suggesting they are largely using gig economy work as an income top-up – with just 14% saying they were working in the gig economy because they could not find a permanent job.¹³

For policy makers, this implies that we should not seek to impose a one-size-fits-all or disproportionate model of regulation, with the extra income from gig work rarely a household’s only or main source of income.

⁹ BEIS, February 2018, “The characteristics of those in the gig economy”, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/687553/The_characteristics_of_those_in_the_gig_economy.pdf

¹⁰ RSA, April 2017, “Good Gigs: a fairer future for the UK’s gig economy”, https://www.thersa.org/globalassets/pdfs/reports/rsa_good-gigs-fairer-gig-economy-report.pdf

¹¹ CIPD, March 2017, “To gig or not to gig?”, <https://www.cipd.co.uk/knowledge/work/trends/gig-economy-report>

¹² BEIS, February 2018, “The characteristics of those in the gig economy”, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/687553/The_characteristics_of_those_in_the_gig_economy.pdf

¹³ CIPD, March 2017, “To gig or not to gig?”, <https://www.cipd.co.uk/knowledge/work/trends/gig-economy-report>

Different gig economy platforms provide different choices and different trade-offs

While much of the analysis of the gig economy treats it as a single type of work, it often represents very different types of job. The work of a freelance graphic designer is very different to that of an on-demand taxi driver – attracting different types of people, requiring different up-front costs and presenting different trade-offs. A prime example is two big motivations for Deliveroo riders - keeping fit and working locally, which, as previously noted, rarely gets highlighted in the public policy debate. These are unlikely to be motivations for offering services to a taxi platform, where the work is sedentary and drop-offs could potentially be hundreds of miles away.

No gig economy job is likely to suit everyone. In the context of Deliveroo, for example, the focus groups found that riders thought that some people would not have the self-discipline required to make the money they want; not everyone wants to work outdoors in all seasons; the times when demand for takeaway food is high - primarily around meal times, especially at the weekend - may not fit with other life commitments.

Gig economy platforms could do more to help their workers build long term skills, and demonstrate their experience in the gig economy to traditional employers

While the majority of gig economy workers do not see their work as a replacement for a traditional job, our survey data suggested that just under two thirds of riders believed that the skills they were building would help with future employability. Given that many gig economy workers will either go into other careers, or, as many in our focus groups suggested start their own business, it is important that platforms assist individuals in building skills and credentials. Polling for the CIPD found that 41% of gig economy workers worried that they were “unlikely to be able to afford to invest in my own skills development, training or learning.”¹⁴

This is potentially a significant missed opportunity, as platforms such as Deliveroo generally have as good or better data on their riders’ performance as traditional employers - but while star ratings and other feedback mechanisms are often visible to the end user within a platform, many would feel uncomfortable incorporating these into a traditional CV or in place of a reference. The Government should work with gig economy platforms and business organisations to help design meaningful accreditation of reliability and effort that workers could transfer to more traditional employment. For some platforms, this could also include accreditation of new skills learned and mastered, giving workers more of an incentive to invest in training.

The gig economy is likely to continue to grow and become a more important part of the UK labour market

One challenge with projecting potential growth paths for the gig economy is that we do not have much good historical data to observe past trends from – with significant disagreement over how large the gig economy is today, let alone how fast it has grown or will continue to grow. For the purposes of the report, we have chosen to follow BEIS’ definition and coverage. This includes everyone who has used a gig economy platform in the last twelve months, with just over half using a platform more than once a month and the rest logging on more irregularly.¹⁵

¹⁴ - To gig or not gig?, CIPD, March 2017

¹⁵ BEIS defines the gig economy as work that, “involves the exchange of labour for money between individuals or companies via digital platforms that actively facilitate matching between providers and customers, on a short-term and payment by task basis”

Nevertheless, we estimate that there are good reasons to believe that it could roughly double in size over the next five years:

- Data from the Online Labour Index show that the number of tasks placed on UK online platforms has grown by around 25% a year in the last two years. The Online Labour Index is a new indicator created by the Oxford Internet Institute that tracks the projects posted on the five largest English-language online labour platforms.¹⁶
- London currently contains a significantly higher share of gig economy work than the rest of the country. While some of this is a demographic effect, if the rest of the UK was to match London's share, this would by itself see an overall increase of 40%.
- The UK gig economy is around ten years old. Assuming a central estimate from the literature on tech adoption of around 20 years and applying a standard logistic model of tech diffusion and ONS projections for population increases, we estimate the potential for a just over doubling in self-employment opportunities. A more detailed methodology is given in the Appendix.
- Following a similar methodology for the US, recent projections by Intuit and Emergent Research find the number of American gig economy workers is likely to increase from 3.8 million in 2017 to 9.2 million in 2021.¹⁷ Applying a similar growth path to the UK, produces an annual growth rate of around 18%.

Aggregating these different estimates, we produce a central estimate that the UK gig economy could grow by 113% over the next five years. If we use BEIS' estimate that the gig economy contained 2.8 million adults in Great Britain in 2017 (4.4% of the population), **this suggests that by 2022 over 5 million people could work in the gig economy, which could mean performing a single task or working more regularly. This could generate an additional £1.7 billion in real terms in higher incomes, or around an additional £540 a year for 3.2 million workers.**¹⁸

The gig economy platforms are allowing many with other responsibilities who would struggle with a traditional job to earn extra income and transition back into the labour market

As the recent Taylor Review on good work highlighted, *“Certain groups are also more likely to place a greater importance on flexibility such as carers, women, those with disabilities and older workers.”*¹⁹ BEIS' data suggests that 18% of gig economy workers have other part-time jobs, 12% are students, 4% are retired and another 4% unemployed.

From official labour market data, we know that there are nearly a million students and carers in the UK who would like a job, but do not currently have one. An expanding gig economy could prove an important source of new jobs for those who need the flexibility it offers. BEIS' data finds that “levels of educational attainment [are] similar between the general population and those involved in the gig economy”, suggesting that a shortage of qualifications are unlikely to be a barrier – with different types of gig economy available for both skilled and unskilled work.²⁰

¹⁶ University of Oxford, Online Labour Index, <https://ilabour.ox.ac.uk/online-labour-index/>. This dataset does not include local gig economy services such as ride sharing or food delivery - and so, while it can serve as a reasonable proxy for overall growth, it is not a full measure of the gig economy as a whole.

¹⁷ Recode, May 2017, “The gig economy workforce will double within four years”, <https://www.recode.net/2017/5/25/15690106/gig-on-demand-economy-workers-doubling-uber>

¹⁸ Assuming average incomes for gig economy workers would stay in line with the average income reported in BEIS' data.

¹⁹ The Taylor Review of Modern Working Practices, July 2017, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/627671/good-work-taylor-review-modern-working-practices-rg.pdf

²⁰ BEIS, February 2018, “The characteristics of those in the gig economy”, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/687553/The_characteristics_of_those_in_the_gig_economy.pdf

	Students	Looking after family/home
North East	17,200	24,300
North West	40,000	53,400
Yorkshire and The Humber	37,600	49,100
East Midlands	34,900	40,400
West Midlands	32,400	36,800
East	22,400	45,300
London	77,600	91,900
South East	58,600	76,500
South West	33,800	36,300
Wales	23,300	26,800
Scotland	44,100	33,200
Northern Ireland	8,800	21,000
Total	430,700	535,000

Applying our earlier estimates of potential gig economy growth over the next five years, this suggests the potential for:

- An additional 400,000 income-earning opportunities for students, supporting a £210 million annual increase in their income.²¹
- An additional 1,300,000 income-earning opportunities for parents and carers, supporting a £690 million annual increase in their income.²²

²¹ Assuming the total share of students in gig economy work stays in line with its current proportion (12%).

²² We do not have national level data on the share of carers, and so have instead used Deliveroo data on the share of carers.

Conclusions

The results of the survey and focus group exercises fit into three categories - “strong conclusions”, “reasonable inferences” and “more research needed”:

- **Strong conclusions.** The large majority of Deliveroo riders are making a labour market choice, and have the option of taking traditional employment if they want it. A key reason for making the choice is the flexibility that Deliveroo offers, which repeatedly arises as an attractive feature of riding. The local nature of the work and keeping fit are also strong motivations to ride for Deliveroo, and should be recognised in the debate around the “gig economy”.

It is also clear that some riders who have specific responsibilities in life, benefit more from the type of work that Deliveroo creates in the labour market. For instance, Deliveroo riders who have caring responsibilities or who are students place greater importance on flexibility than those without caring responsibilities and those who do not study. Like other types of gig economy work, for the majority of riders, the income they gain from the gig economy is additional rather than a replacement for more traditional employment.

Underpinning all of the above choice and benefits is the simple fact that most riders can make as least as much money riding for Deliveroo as they would from other work that is available to them.

- **Reasonable inferences.** A large proportion of riders are using Deliveroo to achieve something else in life. They don't see it as a career, although many think it will improve their future job prospects.

Riders are broadly positive about their working environment, with their major gripes being around the functionality of the app which can - on occasion - limit a rider's productivity.

The gig economy is extremely likely to grow as a proportion of the labour market in future years, offering more choices and incomes to individuals who really value the flexibility and freedom it offers - but is unlikely ever to become the dominant model for the labour market. Nevertheless, policymakers and gig economy platforms could do more to take advantage of the opportunities the gig economy offers, and help individuals moving from the gig economy to other types of work to build their skills and gain meaningful credentials from their experience.

- **More research needed.** Riders have a clear preference for what protections they want Deliveroo to offer - they want some form of payment for holidays and for sickness, and discounted vehicle insurance. Yet the focus groups suggest that riders are not crying out for protections, and are largely indifferent to them being provided, especially if it meant some other benefits of the job would be reduced (indeed, previous survey work by Deliveroo found three-quarters of riders unwilling to trade greater security if it meant less flexibility).

The purpose of the survey and focus groups asking riders questions about protections was because it is often assumed that gig economy workers suffer because their labour market protections and opportunities to build skills are weaker than those provided traditional employment. There was enough evidence in this research to suggest that the issue of protections and training is much more complicated than this. Not least, riders repeatedly raised how in their previous traditional jobs they felt they had little protections or opportunities to train anyway. Even then, the priorities of riders were not protections or opportunities to train. Instead, their priorities were functional improvements to the app that would enhance availability to work, improve flexibility and increase productivity.

On average, gig economy workers remain disproportionately likely to be young and located in London. While some of this will change by itself as the gig economy model diffuses out across the rest of the economy, policymakers could also consider what more they could do to offer signposting and help the less digitally engaged take advantage of what it offers. The gig economy could be a powerful tool for helping many parents, carers or who are between other types of work to raise a little extra income - and we are not always taking full advantage of that.

Appendix: Methodology

In order to estimate the potential future impact of the gig economy on the labour economy, we:

- Produced new estimates of the potential growth of the gig economy
- Combined these estimates with existing data on the demographics and average incomes in the gig economy to quantify its overall impact

Projecting the growth of the gig economy

Like any innovative technology or industry sector, the future trajectory of the gig economy is uncertain and impossible to perfectly predict.

Nevertheless, we believe that a conservative middle estimate is that the sector could grow by a cumulative 113% over five years, averaging the results produced by four different models:

- Projecting forward the annual 25% growth of the Online Labour Index, which measures the number of tasks placed on UK online platforms.²³
- Quantifying the overall impact if the rest of the country was to see the high prevalence of gig economy activity seen in London.
- Following the standard literature on technology adoption and diffusion, we calibrated a standard 'S-curve' logistic model, based on the assumption that the gig economy is currently just under ten years old and that total adoption is likely to take around 20 years (20 years was chosen as reasonable middle estimate of the past time for of other technologies.) Given this model, we estimated that in another five years adoption would increase by 47 percentage points and combined this with ONS estimates of likely population growth to produce an overall estimate of cumulative five year growth of 113%.
- Applied the same rate of growth produced for recent projections by Intuit and Emergent Research for the US gig economy to the UK,²⁴ producing a cumulative five-year growth estimate of 126%.

Quantifying the potential impact on the labour market

Using these overall growth estimates, we estimated the potential impact of gig economy on:

- **Self-employment opportunities.** We used BEIS survey data on total workers in the gig economy and grew this by our five year forecast.
- **Rise in incomes.** We conservatively assumed that these workers would earn on average in real terms the average income found in BEIS survey data, and multiplied this by the total number of workers to produce the likely total income.
- **Students.** We used BEIS data on the proportion of students in the gig economy as a whole, assumed that this remained constant and applied it to the overall growth expected.
- **Carers.** We do not have national level data on the share of carers, and so have instead used Deliveroo data on the share of carers as a proxy for the share of carers across the gig economy as a whole. Again, we assumed the share remains constant and applied this to our overall projections of growth.

²⁴ University of Oxford, Online Labour Index, <https://ilabour.oii.ox.ac.uk/online-labour-index/>

²⁵ Recode, May 2017, "The gig economy workforce will double within four years", <https://www.recode.net/2017/5/25/15690106/gig-on-demand-economy-workers-doubling-uber>



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