

## New estimate of the size of Dutch 'Gig Economy'

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Joint study by the Foundation for European Progressive Studies (FEPS) and UNI Europa, carried out by University of Hertfordshire and Ipsos MORI is investigating the size of the 'gig economy' in Europe. In Netherlands the research was co-sponsored by TNO Netherlands.

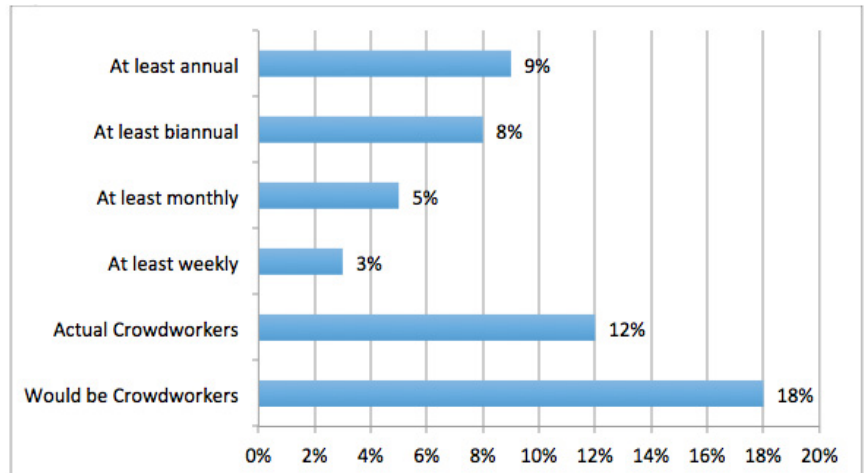
In the online survey of 2,125 Dutch adults aged 16-70, 18% say they have tried at some time to find work managed via so-called 'sharing economy' platforms (Fig. 1) such as Upwork, Villamedia, Croqer, or Uurtjeover – equivalent to around 2.2 million people. Around one in eight (12%) of respondents said they had at some time earned money in this way, equivalent to around 1.4 million people.

There is little difference between the proportions of men and women who are working in this way, with 18% of men who responded saying they had sought crowd work and 11% actually obtaining it, and 17% and 11%, respectively, of women.

Three per cent of respondents claim to find paid work via online platforms at least once a week, equivalent to around 360,000 adults, with 5%, or around 600,000, finding such work at least once a month.

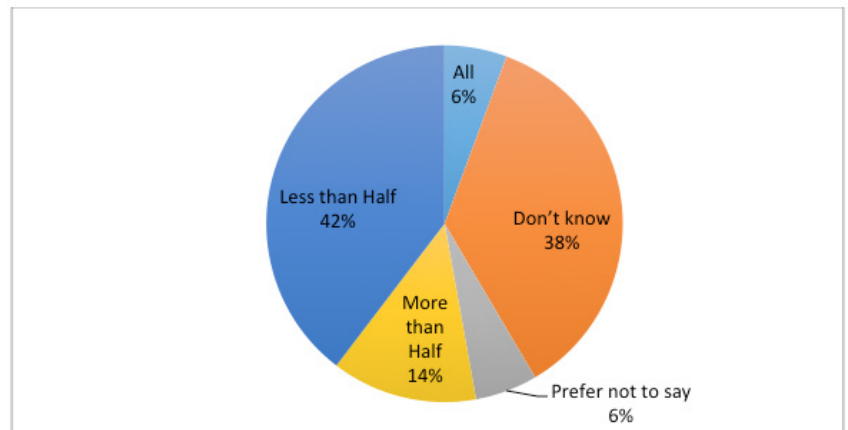
**Main source of work or a supplement to a main job?** It is often thought the gig economy is used either for altruistic reasons or as an occasional income top-up in addition to another main job. In fact, for a substantial minority of crowd workers, it is the only or main source of income with 6% saying it is their only source of income and 14% that it represents more than half (Fig. 2). The majority, 42% say that it represents less than half their income. A substantial proportion (44%) did not know or did not wish to divulge this information.

**FIGURE 1: NETHERLANDS CROWD WORKERS – OVERVIEW <sup>1</sup>**



<sup>1</sup> Base: 2,125 online adults aged 16-70 across the Netherlands

**FIGURE 2: PROPORTION OF INCOME FROM CROWD WORK (% OF ALL CROWD WORKERS) <sup>2,3</sup>**



<sup>2</sup> Unweighted base: 248 online Dutch adults 16-70 who have found paid crowd work online

<sup>3</sup> Where percentages do not sum to 100, this may be due to computer rounding, the exclusion of "don't know" categories, or multiple answers



**Earnings** Crowd workers are spread across a broad range of income categories (Fig. 3). Around one third (32%) earn under €18,000 per year. Almost as many (29%) earn between €18,001 and €36,000 and another third (32%) earn between €36,001 and €60,000 each year. A smaller percentage (6%) of crowd workers earn more than €60,000 per year.

#### What work are they looking for?

People looking for work via online platforms are often looking for several different types of work (Fig. 4).

Fifteen per cent of the 2,125 Dutch adults surveyed say they have at some time looked for online work they can carry out from their homes on platforms such as Freelancer or Villamedia. This is work that can be done from anywhere, so they are in a global labour market, perhaps competing with workers in India, Eastern Europe, the Americas or other parts of the world.

At the same time, 9% of the Dutch adults surveyed said they have at some time looked for work they can do offline, such as cleaning, carpentry or gardening in other people's premises, for platforms such as Croqqr or Uurtjeover.

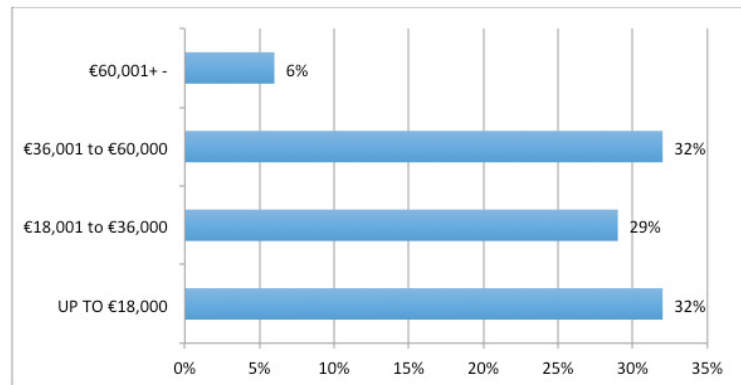
Finally, a similar proportion (8%) say they are looking for work as drivers, for companies like Über or Blablacar.

It is clear that many crowd workers do not restrict themselves to a single type of work but offer to provide several kinds of service.

#### What work are they actually doing?

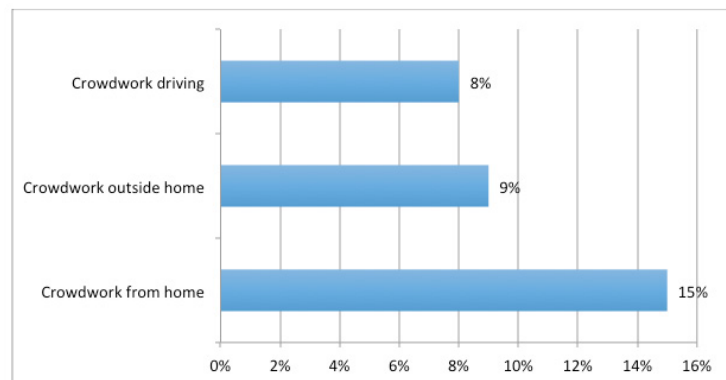
When it comes to the work that crowd workers are actually doing, it is clear that some do a wide variety (Fig. 5). A significant proportion of respondents who are undertaking work via online platforms are doing more than one type of work. The range is extremely broad, from high-skill professional work at one extreme to running errands at the other. The most common type of crowd work, done by more than 58% of crowd workers, is office work, short tasks and 'click work' done online. However large numbers (50%) are doing either creative and IT work or (50%) professional work. When it comes to work that is carried out offline (even though it is managed via online platforms) we again find high proportions of crowd workers active

FIGURE 3: PERSONAL INCOME OF CROWD WORKERS <sup>4</sup>



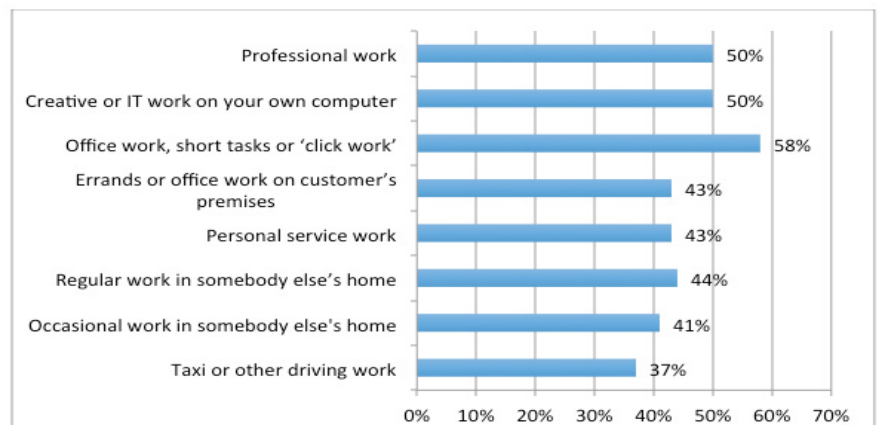
<sup>4</sup> Unweighted base: 248 online Dutch adults 16-70 who have found paid crowd work online. Figures exclude those who did not know or refused to divulge income

FIGURE 4: TYPE OF WORK SOUGHT ON ONLINE PLATFORMS <sup>5</sup>



<sup>5</sup> Base: 2125 online adults aged 16-65 across Netherlands

FIGURE 5: TYPES OF WORK BEING CARRIED OUT BY CROWD WORKERS <sup>6</sup>



<sup>6</sup> Unweighted base: 248 Dutch adults 16-70 who have found paid crowd work online





across several activities. Almost four in ten (37%) do driving work, and similar proportions do personal service work (43%), and errands or office work on their clients' premises (43%). Again, similar proportions do regular (44%) or occasional (41%) work in other people's homes. This reinforces the picture of people piecing together a livelihood from a range of different tasks.

**Who are the crowd workers?**

Women are somewhat less likely than men to be crowd workers, with 46% of the crowd workforce female and 54% male.

Crowd workers are more likely to be young than old, but not dramatically so (Fig. 6). More than one in five (22%) is aged between 16 and 24, and the same proportion (22%) between 25 and 34. The remainder are distributed widely across the older age bands, with 21% aged 35-44, 17% 45-54 and 18% 55-70. There are clearly significant numbers of 'silver surfers' among the crowd workforce.

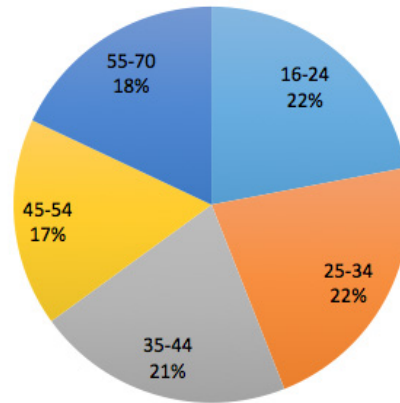
It is often thought that most crowd workers are students. This is not the case. Only 13% of those actually doing crowd work in the sample were students, a proportion roughly in line with the percentage (11%) of students in the overall population.

**Where are they living?** Crowd workers can be found in all provinces of the Netherlands, approximately in line with the general distribution of population (Fig. 7). The largest concentration (24%) is in Zuid-Holland, followed by 21% in Noord-Holland.

**Who are they working for?** A third of respondents (33%) in the survey said that they have bought services from a crowd worker in the last year, equivalent to an estimated 3,950,000 Dutch adults. This figure would include activities such as home maintenance and repairs, or booking a taxi. The figure relates only to work that is directly carried out for the client and does not include services where people rent out their properties, like Airbnb.

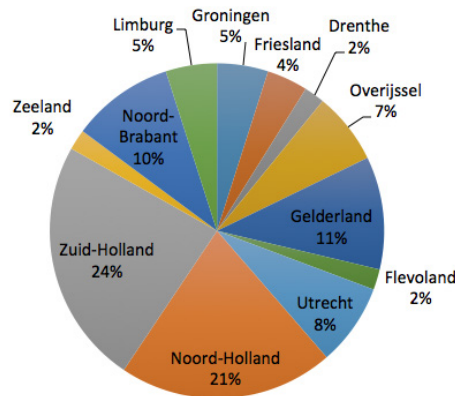
In the Dutch survey, customers for crowd work were somewhat richer than the crowd workers who supply them with services, though there was considerable overlap between the two groups (Fig. 8). Only 18% of crowd work customers earned less

FIGURE 6: AGE OF CROWD WORKERS <sup>7</sup>



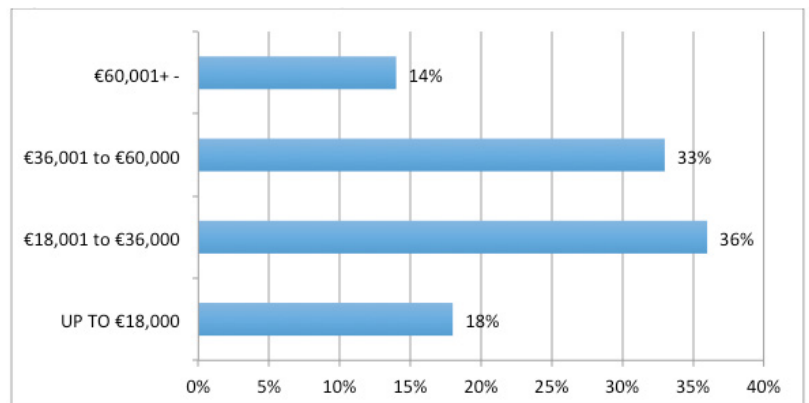
<sup>7</sup> Unweighted base: 248 Dutch adults aged 16-70 who have found paid crowd work online

FIGURE 7: CROWD WORKERS BY REGION <sup>8</sup>



<sup>8</sup> Unweighted base: 248 Dutch adults aged 16-70 who have found paid crowd work online

FIGURE 8: CROWD WORK CUSTOMERS BY PERSONAL PRE-TAX INCOME <sup>9</sup>



<sup>9</sup> Base: 706 online Netherlands adults aged 16-70 who have purchased crowd work services online. Figures exclude those who did not know or refused to divulge income





than €18,000 per year, compared with 32% of crowd workers. By contrast, at the top of the earnings range, some 14% of crowd work customers earned more than €60,000 per year, compared with only 6% of crowd workers. In the middle-income range, crowd work customer incomes were more in line with crowd worker incomes: some 36% of crowd work customers earned €18,001 to €36,000 per year, compared with 29% of crowd

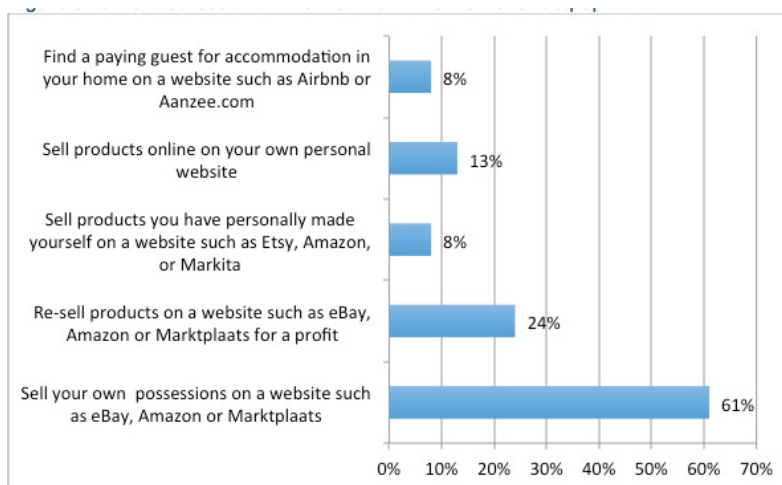
workers; and 33% of crowd work customers had incomes between €36,001 and €60,000, compared with 32% of crowd workers.

### Broader involvement in the online economy.

Looking more broadly at the Dutch population's involvement in the online economy (excluding online grocery shopping) around 72%

of respondents are either making an income from online activities, including home rental schemes like Airbnb, or buying labour from others – giving an estimated equivalent of more than 8.5 million people across the Netherlands as a whole.

FIGURE 9: OTHER SOURCES OF ONLINE INCOME IN THE UK POPULATION <sup>10</sup>



<sup>10</sup> Base: 2125 online adults aged 16-70 across the Netherlands

**About the research.** University of Hertfordshire, European think tank FEPS and European service workers' union UNI Europa are collaborating on a year-long research project to explore the scale and impact of the growth of crowd working, and provide a more comprehensive picture of the digitalised labour market across the European Union.

For the first stage of this project, Ipsos MORI interviewed an online sample across the United Kingdom using i:omnibus, Ipsos MORI's online omnibus. This survey has now been replicated in several other European countries. The Dutch survey was co-sponsored by TNO Netherlands. In the Netherlands, 2125 adults aged 16-70 were interviewed. Interviews took place between 22nd and 27th April 2016. Data are weighted by age

within gender, region, working status and economic activity to match the profile of the adult population aged 16-70 in the Netherlands.

Population estimates are derived according to Eurostat 2014 population figures for adults aged 16-70 in the Netherlands, estimated at 11,967,601. Survey percentages are grossed up as a proportion of this figure.

